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| Test Script  SAP SuccessFactors HCM Core  April 2018  English | Customer |
| Manage Employee Benefits  ID: 2OB (United States) |

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Document History

| **Revision** | **Change Date** | **Description** |
| --- | --- | --- |
|  |  |  |

# Purpose

## Purpose of the Document

This document provides a detailed procedure for testing the scope item Manage Employee Benefits after solution deployment, reflecting the predefined scope of the solution. Each process step is covered in its own section, providing the system interactions (i.e. test steps) in a table view. Steps that are not in scope of the process but are needed for testing are marked accordingly (see column Test Step). Customer-project-specific steps must be added.

Note for the customer project team: Instructions for the customer project team are mentioned between brackets and should be removed before hand -over to project testers. The appendix is included for internal reference, in particular to support A2O, and should also be deleted before hand-over to the customer, unless deemed helpful to explain the larger context.

## Purpose of Manage Employee Benefits

Benefits are either monetary or non-monetary components paid to an employee. In general, there are some mandatory benefits by law, which may vary from country to country. Apart from mandatory benefits there are other benefits, which may vary again from company to company or industry to industry.

Different types of benefits are considered in SAP SuccessFactors Employee Central:

* Allowances: these are benefits, which are provided directly in the employee’s salary
* Reimbursements: these are benefits where an employee incurs expenses, and submits a claim to recover the money
* Pension: this is a retirement benefit that an employee is entitled to at the time of retirement. This amount is to be paid regularly to an employee, following his/her retirement from service. To enable enough payment at the time of retirement, many employers offer this as a benefit where they contribute a certain percentage or amount to an employee’s chosen retirement fund. The employee also contributes to this fund.
* Insurances: Insurance plans provide the protection to the policy holder and its dependents from life’s uncertainties or medical emergencies.
* Deductible Allowances: these are the benefits that allow some periodic deductions from an employee’s compensation after his or her enrollment.
* Other Benefits: There are some benefits in which the employee is eligible for without enrolling or claiming. Employee can view these benefits on their employee overview page. To get a detailed information about such benefits or its policies, the employees can use the link that appears against each benefit

This document describes the typical activities performed by the employee to enroll in benefits, edit benefits, or claim a benefit. If the employee has no access to the system, the benefits administrator can perform these activities on behalf of the employee.

# Prerequisites

This section summarizes all prerequisites to conducting the test in terms of systems, users, master data, organizational data, and other test data and business conditions.

## Configuration

Please ensure to follow the correct installation sequence of building blocks as specified in the Prerequisite Matrix.

## System Access

The test should be conducted with the following system and users:

|  | Type of Data | Details |
| --- | --- | --- |
| System | SAP SuccessFactors Employee Central | <Provide details on how to access system, e.g. system client or URL> |
| Standard User | Employee | <Provide Standard User Id and Password for test, if applicable> |
| Standard User | Benefits Administrator | <Provide Standard User Id and Password for test, if applicable> |

 Note

In the following, the SAP SuccessFactors Employee Central system will be referenced as Employee Central.

## Roles

For non-standard users, the following roles must be assigned in Employee Central to the system user(s) testing this scenario.

| Business Role | Permission Role | Process Step | Sample Data |
| --- | --- | --- | --- |
| Benefits Administrator | For testing purposes, only: use the appropriate Super Admin group to which the role of the SAP BestPractices Benefits Admin has been granted | Refer to chapter Overview Table | Test user: <userid>; Password: <password>  For testing purposes, you can log in as Super Admin and use the Proxy Now option to proxy as the benefits administrator role. |
| Employee | SAP BestPractices Benefits ESS US | Refer to chapter Overview Table | Test user: <userid>; Password: <password>  For testing purposes, you can log in as Super Admin and use the Proxy Now option to proxy as the employee role. |
| (Employee’s) HR Business Partner   Note  This is the person having Relationship Type HR Manager to the employee; visible in the Job Relationships block of the employee. The Job Relationships block is located in the Employment Information section > Job Relationships subsection. | SAP BestPractices Employee (Self Service for EC) | Refer to chapter Overview Table | Test user: <userid>; Password: <password>  For testing purposes, you can log in as Super Admin and use the Proxy Now option to proxy as the employee role. |

## Master Data, Organizational Data, and Other Data

The organizational structure and master data of your company have been created in your system during implementation. The organizational structure reflects the structure of your company and includes the company, cost center and location in the system. The master data reflects employee specific data.

## Business Conditions

Before this scope item can be tested, the following business conditions must be met.

|  | Business Condition | Comment |
| --- | --- | --- |
| 1 | Employees must have been hired (or rehired) and already exist in the system. | In case the Core content has been deployed with the SAP Best Practices, you can refer to the appropriate process step of scope item Add New Employee / Rehire (FJ0). |
| 2 | The benefits to which the employee is eligible have been set up during configuration.  In case the employee should be enrolled automatically in some benefits, appropriate jobs for automatic enrollment have been setup and have run successfully. |  |
| 3 | In case the employee has dependents, who should also be enrolled in benefits, appropriate data of these dependents must have been maintained in the employee’s file. | In case the Dependents Management content has been deployed with the SAP Best Practices, you can refer to the appropriate process steps in test script of scope item Manage Dependents (1LY). |

## Preliminary Steps

### Enrolling Employee Automatically in Benefits (Optional)

Use

Benefits might exist for which the employee needs not manually enroll in, but is automatically enrolled. This is the case for benefits, for which during configuration, field Enrollment Required has been set to Yes and field Enrollment Type has been set to Automatic.

Prerequisites

A one-time job for auto enrollment of benefit has been created during configuration and scheduled to run.

Result

After the job has run for the employee, the employee will be automatically enrolled in the selected benefits.

# Overview Table

The scope item Manage Employee Benefits consists of several process steps provided in the table below.

| Process Step | UI Type | Business Condition | Business Role | Transaction | Expected Results |
| --- | --- | --- | --- | --- | --- |
| View my Eligible Benefits | Employee Central UI | The employee is allowed to enroll in benefits. | Employee | Company Instance URL | Details to eligible benefits have been viewed. |
| Benefits Enrollment (Sub-Process) | | | | | |
| Use Case 1: Option 1: Enroll in Benefits during Open Enrollment Period via Self-Service | Employee Central UI | The employee wants to enroll in benefits during the open enrollment period. | Employee | Company Instance URL | A benefit has been enrolled in during the open enrollment period. The request has been sent to the HR Business Partner for approval. |
| Use Case 1: Option 2: Enroll in Benefits during Open Enrollment Period on Behalf of Employee | Employee Central UI | The employee wants to enroll in benefits during the open enrollment period, but has no access to the system. | Benefits Administrator | Company Instance URL | A benefit has been enrolled in during the open enrollment period by the benefits administrator for the employee. The request has been sent to the HR Business Partner for approval. |
| Approve Enrollment in Benefits during Open Enrollment Period | Employee Central UI |  | HR Business Partner (of the employee) | Company Instance URL | The enrollment in benefits during the open enrollment period has been approved. |
| Send E-mail Notification about Approval of Employee Enrollment in Benefits during Open Enrollment Period | Back-ground | The e-mail address of the employee is maintained in his or her employee file. |  |  | A notification about the approved enrollment in benefits during the open enrollment period has been sent to the enrolling employee. |
| Receive E-mail Notification about Approval of my Enrollment in Benefits during Open Enrollment Period | E-Mail |  | Employee | outside software | The notification about the approval of the enrollment in benefits during the open enrollment period has been received by the enrolled employee. |
| Use Case 2: Option 1: Enroll in Other Benefits via Self-Service | Employee Central UI | The employee wants to enroll in other upcoming benefits. | Employee | Company Instance URL | Another upcoming benefit has been enrolled in. |
| Use Case 2: Option 2: Enroll in Other Benefits on Behalf of Employee | Employee Central UI | The employee wants to enroll in other upcoming benefits, but has no access to the system. | Benefits Administrator | Company Instance URL | Another upcoming benefit has been enrolled in by the benefits administrator for the employee. |
| View my Benefits Enrollments | Employee Central UI |  | Employee | Company Instance URL | Details to the benefits enrollments have been viewed. |
| Benefits Update (Optional Sub-Process) | | | | | |
| Option 1: Update Benefits Enrollment via Self-Service | Employee Central UI | The employee wants to update a benefits enrollment. | Employee | Company Instance URL | A benefits enrollment has been updated. The data is saved and visible on the employee’s profile. |
| Option 2: Update Benefits Enrollment on Behalf of Employee | Employee Central UI | The employee wants to update a benefits enrollment, but has no access to the system. | Benefits Administrator | Company Instance URL | A benefits enrollment update has been entered by the benefits administrator for the employee. The data is visible on the employee’s profile. |
| Benefits Claims (Sub-Process) | | | | | |
| Option 1: Claim Benefits via Self-Service | Employee Central UI | There is still some amount of money left out of the maximum amount that the employee can claim. | Employee | Company Instance URL | A benefit has been claimed. The request has been sent to the HR Business Partner for approval. |
| Option 2: Claim Benefits on Behalf of Employee | Employee Central UI | There is still some amount of money left out of the maximum amount that an employee can claim. The employee has no access to the system. | Benefits Administrator | Company Instance URL | A benefit has been claimed by the benefits administrator for the employee. The request has been sent to the HR Business Partner for approval. |
| Approve Benefits Claim | Employee Central UI |  | HR Business Partner (of the employee) | Company Instance URL | The benefits claim has been approved. |
| Send E-mail Notification about Employee Benefits Claim Approval | Back-ground | The e-mail address of the employee is maintained in his or her employee file. |  |  | A notification about the approved benefits claim has been sent to the requesting employee. |
| Receive E-mail Notification about Approval of my Benefits Claim | E-Mail |  | Employee | outside software | The notification about the approval of benefits claim has been received by the requesting employee. |
| View my Approved Benefits Claim (Optional) | Employee Central UI |  | Employee | Company Instance URL | Details to the approval of benefits claim have been viewed. |

# Test Procedures

This section describes test procedures for each process step that belongs to this scope item.

The test should take around 70 minutes.

Prerequisites

Enrolling in benefits during the open enrollment period as well as claiming benefits requires the approval of the employee’s HR business partner. Therefore, during hiring of the employee, the Relationship Type HR Manager must have been maintained.

 Recommendation

In case it has been missed to maintain the Relationship Type HR Manager, it can be added as briefly described below:

* Log on to Employee Central as HR Administrator.
* Select from the Home drop-down My Employee Files. Select the drop-down next to your name to enter the employee’s name in the search box, and choose in the list of employees matching the search criteria the appropriate employee.
* Go to the Employment Information section, and there scroll to the Job Relationships subsection.
* Select the Pencil (Edit) icon next to the Job Relationships block.
* In the upcoming Job Relationships dialog box, enter in the When would you like your changes to take effect? field the date the change is to become valid (most likely the hiring date of the employee). The Job Relationships block shows up in the dialog box. Select the ⊕ Add link and make the following entries:

For field Relationship Type, select HR Manager from the drop-down, and for field Name, select the appropriate employee from the drop-down.

* To add additional relationship types, which should become effective the same data, select the ⊕ Add link and make entries as appropriate.
* Choose the Save button. The data is saved and is visible in the employee’s Job Relationships subsection of the Employment Information section. Note, that also the Clock (History) icon becomes now visible. You can use it, for example, to make corrections on an existing Job Relationships record, if needed.

## Viewing my Eligible Benefits

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | Employee | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

The employee views the benefits he or she is eligible for. This may refer to benefits the employee can enroll manually in, is enrolled automatically in, or for which no enrollment is required (but if the employee is eligible, the benefit is visible in the benefits overview page).

The benefits in which the employee is allowed to enroll are divided into two categories:

* benefits which are open for enrollment only during a so-called “Open Enrollment” window.
* benefits which are open for enrollment the whole year, such that the employee can enroll into them any time during the year.

Prerequisites

* Benefits have been setup by the Benefits Administrator.
* The personal data of the employee is up-to-date.
* If applicable, information regarding the employee’s dependents has been maintained.

 Note

In case the Dependents Management content has been deployed with the SAP Best Practices, you can refer for more details to test script of scope item Manage Dependents (1LY).

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as an Employee. | The Home page is displayed. |  |
| 2 | Select Employee File | From theHomedrop-down, select My Employee File*.* | The My Employee File screen is displayed containing your profile. |  |
| 3 | Go to Benefits Section | On the My Employee File screen, scroll to the Employee Benefits section.   Note  Alternatively, you can choose the More  icon and select Employee Benefits. | The Employee Benefits section is displayed. It consists of the Employee Benefits subsection, which on its turn consists of following blocks:   * Current Benefits   This shows the list of the benefits for which you have already enrolled in or have been automatically enrolled in.   Note  In the present SAP Best Practices, the employee is automatically enrolled for telephone reimbursement and basic tuition reimbursement.   * Benefits   This shows the list of benefits to which you are entitled and for which enrollment is pending. The remaining time for enrollment is indicated by the number of Days Remaining and the change in color indicates enrollment urgency. |  |
| 4 | View Benefits Details | To view the details of the benefits to which you are eligible, click in the Benefits block on the quick card icon next to each benefit name to view the details of the benefit. | The <Benefit Name> Details window is displayed, containing details to the benefit as configured during implementation, like for example: general data, benefit payment option, contact person in case of questions, |  |
| View details in the <Benefit Name> Details window. When done, choose X (Cancel). |  |  |
| 5 | Go to Benefits page | Select in the Current Benefits block the Go to Benefits link. | The Benefits page is opened, containing several sections. The (US Open) Enrollments section is displayed per default. It consists of following subsections:   * Open Enrollments   This shows the list of benefits which you can enroll in or edit only during a certain enrollment period.   * Other Upcoming Enrollments   This shows the list of benefits which you can enroll in any time during a calendar year. |  |
| 6 | View Open Enrollments Details | In the Open Enrollments subsection, details about the open enrollment process are displayed.  Read the instructions and notes. These provide the step-by-step procedure you need to execute for enrolling in a benefit.   Note  Alternatively, you can skip reading the instructions and notes for now, and perform this activity when actively enrolling in benefits, as described in process step 4.2.1.1.1 Enrolling in Benefits during Open Enrollment Period via Self-Service. |  |  |
| Check the list of benefits to which you are eligible.  Next to each benefit name, you can select the quick card icon to view details about that particular benefit. |  |  |
| 7 | View Details of Other Enrollments | In the Other Upcoming Enrollments subsection, details to the benefits outside the open enrollment period are displayed.  Check the list of benefits to which you are eligible.  Next to each benefit name, you can select the quick card icon to view details about that particular benefit. |  |  |
| 8 | View Data in Other Sections | View data as available in the other sections and subsections of the Benefits page.  For example, in the present SAP Best Practices, no enrollment is needed for telephone reimbursement or basic tuition reimbursement. Instead, if you are eligible, you will see them automatically in the Reimbursements section. You can select the quick card icon next to the Telephone Reimbursement or Basic Tuition Reimbursement benefit to view details about it. |  |  |

## Benefits Enrollment (Sub-Process)

Purpose

An employee, who is eligible for benefits, will be allowed to enroll in these. He or she can enroll in the benefits using the self-service functionality.

In general, benefits are divided into two categories:

* benefits, which are open for enrollment only during a so-called “Open Enrollment” window.

If the employee does not enroll during the open enrollment period in benefits of this category, the appropriate benefits disappear from the employee’s Employee File page after the enrollment period ends. The employee will not be able to enroll in these benefits anymore and needs to wait for the next open enrollment period.

* benefits, which are not related to a specified open enrollment period, such that the employee can enroll into them any time during the year.

If the employee cannot access the system, then a person with the appropriate permissions (most likely a benefits administrator) can enroll in benefits on behalf of the employee.

In the following, enrollment in these two benefits categories, performed by the employee as well as by the benefits administrator on behalf of the employee, is described in detail.

#### Use Case 1: Enrolling in Benefits during Open Enrollment Period

Purpose

The employee enrolls in benefits he or she is eligible for. There exist benefits, which are open for enrollment only during a so-called “Open Enrollment” window. If the employee does not enroll during the open enrollment period in benefits of this category, the appropriate benefits disappear from the employee’s Employee File page after the enrollment period ends. The employee will not be able to enroll in these benefits anymore and needs to wait for the next open enrollment period.

In case the employee has no access to the system and thus cannot enroll in benefits by him- or herself, the benefits administrator with appropriate permissions can do it on behalf of the employee. The benefits administrator follows the same procedure as the employee would do. Most likely, the employee and the benefits administrator would sit together; the employee informs about the benefits he or she would like to enroll in, and the benefits administrator actively does it in the system.

Once the enrollment package has been approved, the employee receives an appropriate email notification about the approval.

In the following, both options are described.

##### Option 1: Enrolling in Benefits during Open Enrollment Period via Self-Service

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | Employee | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

The employee enrolls in benefits during the so-called “Open Enrollment” window. Once the employee has confirmed his or her enrollment, an approval workflow is triggered for the whole open enrollment package, in which the employee has enrolled manually.

Prerequisites

* The personal data of the employee is up-to-date.
* If applicable, information regarding the employee’s dependents has been maintained.

 Note

In case the Dependents Management content has been deployed with the SAP Best Practices, you can refer for more details to test script of scope item Manage Dependents (1LY).

* The Relationship Type HR Manager must have been maintained for the employee in order for the workflow to be triggered.

Procedure

 Note

Several benefits, in which you can enroll only during a certain time period, are delivered within this SAP Best Practices. These are grouped into life, medical, vision, and dental insurances, employer pension, and savings plans. In the following we describe only enrollment into medical insurance. The enrollment procedure in the other benefits visible in the Open Enrollments subsection is similar.

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as an Employee. |  | The Home page is displayed. |  |
| 2 | Select Employee File | From theHomedrop-down, select My Employee File*.* |  | The My Employee File screen is displayed containing your profile. |  |
| 3 | Go to Benefits Section | On the My Employee File screen, scroll to the Employee Benefits section.   Note  Alternatively, you can choose the More  icon and select Employee Benefits. |  | The Employee Benefits section is displayed, containing the Current Benefits and Benefits blocks. |  |
| 4 | Go to Benefits page | Select in the Current Benefits block the Go to Benefits link. |  | The Benefits page is opened, containing several sections. The Enrollments section is displayed per default, containing the Open Enrollments and Other Upcoming Enrollments subsections. |  |
| 5 | Read Instructions (Optional) | In the Open Enrollments subsection, details about the open enrollment process are displayed.  Read the instructions and notes, if not already done as described in process step Viewing my Eligible Benefits. |  |  |  |
| 6 | Check Dependent Details | In the Open Enrollments subsection, select the Check Dependent Details link. |  | A new page opens, containing your Employee File page. |  |
| Go to the Dependents subsection and view the data of your dependents as maintained in the system. |  |  |  |
| Go back to the Benefits page. |  |  |  |
| 7 | Select Benefit to Enroll in | In the <benefit name> block related to the benefit you want to enroll in, for example Medical Insurance, choose the Select Benefit button. |  | The Enrollment of <benefit name> dialog box is displayed. |  |
| 8 | Enter Enrollment Details | In case of enrolling in the medical insurance, view in the Enrollment of Medical Insurance dialog box the data displayed in the General Information block: generalized information in General, currency of benefit in Entitlement Details, and information about the benefit in Policy Documents and Useful Contacts part of the block. |  |  |  |
| If required for the benefit you want to enroll in, upload a supporting document. | Select the  icon next to field Attachment. In the Choose File to Upload dialog box, browse for the document you need to upload, and then choose Open. In the upcoming success dialog box, choose OK. |  |  |
| In the Select Plan part of the Insurance Enrollment block, make following entries: | Plan: select from drop-down the insurance plan for which you want to enroll | Field Carrier is automatically populated with the relevant insurance provider and is read-only. |  |
| Enrolling For: select from drop-down for whom you want to enroll   Note  You have the option to enroll yourself only, yourself and one dependent, or yourself and your family. | In case you select to enroll your dependents, you will need to enter details also in the Enroll Dependents block. |  |
| Coverage: select from drop-down the coverage that you want to enroll   Note  The system displays the coverage option based on the option that you select in fields Plan, Enrolling For, and Carrier. | The contribution fields in the Contribution Amounts block are automatically populated and are read-only; they show your contribution, your employer’s contribution, and the payment frequency. |  |
| In case you have selected in field Enrolling For a value which includes also your dependent(s), you need to enter details in the Enroll Dependents block, too. For this, select the ⊕ Add Enroll Dependents link. The Enroll Dependents block is expanded and you can make following entries: | Name: select name of dependent from drop-down | The fields Relationship, Date of Birth and Gender are automatically filled with the data maintained in the Employee File page > Personal Information section > Dependents subsection and are read-only. |  |
| 9 | Confirm Benefit to Enroll in | Select the Confirm button. |  | The message Your changes were successfully saved is displayed. The benefit has been added to the shopping cart .  In the <benefit name> block related to the benefit you have selected in test step # 7, high-level details of that benefit are displayed. The Select Benefit button has changed to Edit Details button.   Note  In case you have entered data in the Enroll Dependents block, but in field Enrolling For you have selected Employee, an error message is displayed. Choose OK to return to the Enrollment to <benefit name> dialog box. Either adapt the value in field Enrolling For or delete the dependent data in the Enroll Dependents block. |  |
| 10 | Enter Enrollment Details in Other Benefit Types | Repeat test steps # 7 to # 9 for other benefits in which you can enroll only during the open enrollment period. The fields to be filled depend on the benefit type you enroll in. |  |  |  |
| 11 | Enroll in Benefits | Once you have selected and confirmed all benefits of interest, you can finally enroll in them.  Click on the shopping cart icon . |  | The Benefits Selection callout is displayed, containing the list of benefits and plans in which you want to enroll. For each benefit and/or plan, details to the amount of money you and your employer are contributing as well as the frequency of these payments are given. At the bottom of the callout, your total estimated contribution is given. |  |
| On the Benefits Selection callout, select the Enroll button. |  | The Terms and Conditions dialog box is displayed. |  |
| After having read the Terms and Conditions for enrollments, agree to them by flagging the appropriate checkbox. Then select the Confirm button. |  | A workflow is triggered. The Please confirm your request dialog box appears on the screen. |  |
| 12 | Enter Comment to Request | In the dialog box, enter an appropriate comment to your request, if appropriate. |  |  |  |
| 13 | Check Approver | In the dialog box, select the Show workflow participants link to verify the approver of the request. |  | Your HR Business Partner is shown as approver. |  |
| 14 | Confirm Workflow | Select the Confirm button. |  | The message Your changes were successfully saved is displayed. The workflow has been sent to the next processor.  Each benefit within the enrollment group has status Approval Pending and the Edit Details button below the benefit is greyed out. |  |
| 12 | Return to Employee Files screen (Optional) | Choose the arrow back  button on top of the Benefits page, to return to the My Employee File screen. |  | The My Employee File screen is displayed. |  |



 Note

In case you have enrolled only for some of the benefits, you still have the option to enroll in the left benefits for as long as the enrollment period is open.

If you do not enroll to benefits during the open enrollment period, the appropriate benefits disappear from your people profile after the enrollment period ends.

 Recommendation

As employee, you have the option to continue with use case 2 described in chapter 4.2.1.5 Enrolling in Other Benefits.

As HR Business Partner of the employee, you should continue in the process execution with process step 4.2.1.2 Approving Enrollment in Benefits during Open Enrollment Period and subsequent.



##### Option 2: Enrolling in Benefits during Open Enrollment Period on Behalf of Employee

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | Benefits Administrator | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

In case the employee has no access to the system and thus cannot enroll in benefits by him- or herself, the benefits administrator with appropriate permissions can do it on behalf of the employee. The benefits administrator follows the same procedure as the employee would do. Most likely, the employee and the benefits administrator would sit together; the employee informs about the benefits he or she would like to enroll in, and the benefits administrator actively does it in the system.

Prerequisites

* The personal data of the employee needs to be up-to-date.
* If applicable, information regarding the employee’s dependents has been maintained.

 Note

In case the Dependents Management content has been deployed with the SAP Best Practices, you can refer for more details to test script of scope item Manage Dependents (1LY).

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as a Benefits Administrator. | The Home page is displayed. |  |
| 2 | Search Employee | In the Search for actions or people box, in the top right corner of the screen, enter the name (or name parts) of the employee on behalf of whom you want to enroll in benefits. | The autocomplete functionality suggests a list of employees matching your search criteria. |  |
| 3 | Select Employee | Select the appropriate employee from the result list. | You are directed to the Employee Files page in which the profile of the employee is displayed. |  |
| 4 | Go to Benefits Section | On the My Employee File screen, scroll to the Employee Benefits section.   Note  Alternatively, you can choose the More  icon and select Employee Benefits. | The Employee Benefits section is displayed, containing the Current Benefits and Benefits blocks. |  |
| 5 | Enroll Employee in Benefits | Enroll the employee in benefits related to the open enrollment period.  Proceed similar as described in the Procedure of process step 4.2.1.1.1 Enrolling in Benefits during Open Enrollment Period via Self-Service, starting test step # 4. |  |  |

 Recommendation

Continue in the process execution with process step 4.2.1.2 Approving Enrollment in Benefits during Open Enrollment Period and subsequent.

#### Approving Enrollment in Benefits during Open Enrollment Period

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | HR Business Partner (of employee) | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

The HR Business Partner of the employee approves the enrollment in benefits the employee has performed during the open enrollment period. Until the enrollment request is approved, it has status Approval Pending and cannot be edited.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as an HR Business Partner. | The Home page is displayed. |  |
| 2 | Access Requests Tile | On the Home page, go to theTo Dosectionand click on the Approve Requests tile. | The Approve Requests dialog box is displayed, containing a list of all the requests you need to approve. For each request, high level details are given, which depend on the request type. |  |
| 3 | Select Enrollment Request | In the Approve Requests dialog box, click on the Benefit Enrollment Group for <Employee Name> link.   Note  In case you have several requests in the tile, select the Go to Workflow Requests link located at the bottom right of the Approve Requests dialog box. The My Workflow Requests (#) screen is displayed. If appropriate, click More, to have the complete list of requests. Select the Filter  icon to search for the request you need to approve. In the filter criteria fields, which show up, make entries as appropriate. For example, enter for field Request Type value Change Generic Object Actions and for field Object value Benefit Enrollment Group, then choose the Go button. In case you obtain several results for your search, you have the option to sort the requests, for example based on the date you received them, in order to ensure their timely completion. Select the Sort cid:image064.png@01D2EF17.DB16DA80 icon and in the menu, that expands, check the appropriate radio-buttons and choose Apply. In the result list, click on the appropriate Benefit Enrollment Group for <Employee Name> link. | The Employee Files > Workflow Details screen is displayed containing details to the benefits claim request. The screen is divided in several sections:   * The Do you approve this request? section contains a short overview of the request, its initiator, and the workflow participants. * The Benefit Enrollment Group section contains the detailed request. * In the Comment section, you can post your remarks to the request. * On the right part of the screen a short profile of the employee for whom the benefit enrollment is requested is given, as well as administrative details to the request initiation. |  |
| 4 | Review Employee Benefit Enrollment | Review the details in the Benefit Enrollment Group section. | The data for the benefit enrollment has been reviewed and is ready for approval. |  |
| 5 | Approve Enrollment | If everything is fine, choose the Approvebutton to approve the benefit enrollment request. | The system generates a message about the successful approval of the workflow. You are directed back to your Home page.   Note  In case you have approved the request starting from the My Workflow Requests (#) screen (see Note in test step # 3), you are directed back to this page; the number of requests you still need to approve has decreased by 1. If appropriate, you can process other requests as per your requirement. Once there is no request left for you to approve, the My Workflow Requests (#) screen will have no entry anymore and the Approve Requests tile will no longer be visible in the To Dosection of your Home page. |  |

 Note

If required, you can also decline the benefit enrollment request. In this case, it is recommended to add a comment explaining your decision.

Result

The enrollment in benefits during the open enrollment period has been approved. It is visible in the Current Benefits block of the Employee Benefits section in the employee’s file and can be viewed by the employee.

#### Sending E-mail Notification about Approval of Employee Enrollment in Benefits during Open Enrollment Period

Purpose

After the employee’s enrollment in benefits during the open enrollment period has been approved, an email is sent out to the employee notifying him or her about this approval.

Prerequisites

The email address of the employee needs to be maintained in his or her employee file in the Contact Information block (located in the Contact Information subsection).

Procedure

This is an automated step, and no manual execution is required.

#### Receiving E-mail Notification about Approval of my Enrollment in Benefits during Open Enrollment Period

Purpose

The Employee has received an email notification about the approval of his or her enrollment in benefits during the open enrollment period.

Procedure

This is an automated step, and no manual execution is required.

 Recommendation

You can continue in the process execution either with Use Case 2 described below and subsequent, or directly with process step 4.2.2 Viewing my Benefits Enrollments.

#### Use Case 2: Enrolling in Other Benefits

Purpose

Besides benefits, which are open for enrollment only during a certain period, there exist also benefits in which the employee can enroll any time during the year. In case the employee has no access to the system and thus cannot enroll in these benefits by him- or herself, the benefits administrator with appropriate permissions can do it on behalf of the employee. The benefits administrator follows the same procedure as the employee would do. Most likely, the employee and the benefits administrator would sit together; the employee informs about the benefits he or she would like to enroll in, and the benefits administrator actively does it in the system.

 Note

Depending on the configuration there may be an approval workflow triggered for each benefit the employee has enrolled in manually. This is not considered in the present document.

In the following, both options are described.

##### Option 1: Enrolling in Other Benefits via Self-Service

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | Employee | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

The employee enrolls in other upcoming benefits. Such benefits are not restricted for enrollment to a certain period only, but they are open for enrollment throughout the entire calendar year.

Prerequisites

* The personal data of the employee is up-to-date.
* If applicable, information regarding the employee’s dependents has been maintained.

 Note

In case the Dependents Management content has been deployed with the SAP Best Practices, you can refer for more details to test script of scope item Manage Dependents (1LY).

Procedure

 Note

Several benefits of different types are delivered within this SAP Best Practices. We describe examples for two different types. The enrollment procedure in other benefits not mentioned here, but visible on your Employee File, is similar.

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as an Employee. |  | The Home page is displayed. |  |
| 2 | Select Employee File | From theHomedrop-down, select My Employee File*.* |  | The My Employee File screen is displayed containing your profile. |  |
| 3 | Go to Benefits Section | On the My Employee File screen, scroll to the Employee Benefits section.   Note  Alternatively, you can choose the More  icon and select Employee Benefits. |  | The Employee Benefits section is displayed, containing the Current Benefits and Benefits blocks. |  |
| 4 | Select Benefit to Enroll in | To enroll in a benefit, proceed using one of the options below:  Option 1:  Select in the Benefits block of the Employee Benefits subsection the Enroll Now button below the benefit you want to enroll in, for example Meal Allowance or Health Club Reimbursement.  Option 2:  Select in the Current Benefits block the Go to Benefits link. On the upcoming Benefits page, go to the Other Upcoming Enrollments subsection, located in the Enrollments section. Choose in the <benefit name> block the Enroll Now button. |  | The Enrollment of <benefit name> for <employee name> dialog box is displayed. The start date of the change, visible in field When would you like your changes to take effect?, defaults to today’s date and is read-only.  Continue with one or several of the below described use cases. Test steps # 5 and # 6 contain examples for benefit types you can enroll in. In case you do not want to enroll in all the benefits described, you have always the option to execute directly test step # 7. |  |
| 5 | Use case 1: Enroll in Meal Allowance | In case of enrolling in meal allowance, view in the Enrollment of Meal Allowance for <employee name> dialog box the data displayed in the General Information and Policy Documents and Useful Contacts blocks. |  |  |  |
| In the Entitlement Details block make following entries: | Enrollment Amount: enter as appropriate   Caution  The entered value should be less than or equal to the amount displayed in the read-only field Benefit Entitlement Amount. Otherwise an error message is issued by the system.   Note  The Currency defaults to US Dollar (USD) and is read-only. |  |  |
| Benefits Payment Method: select US - Meal Allowance from drop-down |  |  |
| If needed, you can upload a supporting document. For this, select the  icon next to field Attachment. In the Choose File to Upload dialog box, browse for the document you want to upload, and then choose Open. In the upcoming success dialog box, choose OK. |  |  |  |
| Choose the Save pushbutton. |  | The message Your changes were successfully saved is displayed. The enrolled benefit is displayed in the Allowances block of the Allowances section. |  |
| 6 | Use case 2: Enroll in Health Club Reimbursement | In case of enrolling in health club reimbursement, view in the Enrollment of Health Club Reimbursement for <employee name> dialog box the data displayed in the General Information and Policy Documents and Useful Contacts blocks. |  |  |  |
| If needed, you can upload a supporting document. For this, select the  icon next to field Attachment. In the Choose File to Upload dialog box, browse for the document you want to upload, and then choose Open. In the upcoming success dialog box, choose OK. |  |  |  |
| In the Deduction Details block make following entries: | Employee Contribution: enter amount the employee contributes | The fields Employee Contribution Pay Component and Employer Contribution Pay Component are automatically filled and read-only. |  |
| Employer Contribution: enter amount the employer contributes |  |
| Choose the Save pushbutton. |  | The message Your changes were successfully saved is displayed. The enrolled benefit is displayed in the Deductible Allowances subsection of the Deductible Allowances section. |  |
| 7 | Return to Employee Files screen (Optional) | Choose the arrow back  button on top of the Benefits page, to return to the My Employee File screen. |  | In the Current Benefits block of the Employee Benefits section, all benefits you have enrolled in are shown together with the enrollment amount. |  |

 Note

If a workflow is configured in the system, then saving the enrollment details triggers a workflow. The enrollment details are sent to the next processor for approval. Most likely, for each benefit a separate workflow would be defined. This is not considered in the present document.

 Recommendation

Continue in the process execution with process step 4.2.2 Viewing my Benefits Enrollments.

##### Option 2: Enrolling in Other Benefits on Behalf of Employee

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | Benefits Administrator | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

In case the employee has no access to the system and thus cannot enroll in other upcoming benefits by him- or herself, the benefits administrator with appropriate permissions can do it on behalf of the employee. The benefits administrator follows the same procedure as the employee would do. Most likely, the employee and the benefits administrator would sit together; the employee informs about the benefits he or she would like to enroll in, and the benefits administrator actively does it in the system.

Prerequisites

* The personal data of the employee needs to be up-to-date.
* If applicable, information regarding the employee’s dependents has been maintained.

 Note

In case the Dependents Management content has been deployed with the SAP Best Practices, you can refer for more details to test script of scope item Manage Dependents (1LY).

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Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as a Benefits Administrator. | The Home page is displayed. |  |
| 2 | Search Employee | In the Search for actions or people box, in the top right corner of the screen, enter the name (or name parts) of the employee on behalf of whom you want to enroll in benefits. | The autocomplete functionality suggests a list of employees matching your search criteria. |  |
| 3 | Select Employee | Select the appropriate employee from the result list. | You are directed to the Employee Files page in which the profile of the employee is displayed. |  |
| 4 | Go to Benefits Section | On the My Employee File screen, scroll to the Employee Benefits section.   Note  Alternatively, you can choose the More  icon and select Employee Benefits. | The Employee Benefits section is displayed, containing the Current Benefits and Benefits blocks. |  |
| 5 | Enroll Employee in Benefits | Enroll the employee in other upcoming benefits outside the open enrollment period.  Proceed similar as described in the Procedure of process step 4.2.1.5.1 Enrolling in Other Benefits via Self-Service, starting test step # 4. |  |  |

 Recommendation

Continue in the process execution with process step 4.2.2 Viewing my Benefits Enrollments.

### Viewing my Benefits Enrollments

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | Employee | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

After having enrolled in several benefits, the employee can view the benefits he or she has enrolled in. For this, the employee has two options:

* View details to all enrolled benefits as displayed on the Benefits page, or
* View details to a reduced number of enrolled benefits using the Benefits Confirmation Statement.

 Note

In the benefits confirmation statement, the benefits of type reimbursement are not displayed.

Prerequisites

The employee is already enrolled in benefits.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as an Employee.  Note  Alternatively, you can go to your e-mail inbox and search the e-mail notification you received about the approval of your enrollment in benefits during the open enrollment period. The subject of this email states something like “The Create Benefit Enrollment Group action for <your name> has been approved”. Open this e-mail and choose the available hyperlink. You are directed to the Employee Central login screen, where you need to enter your password (your username is already filled by default). | The Home page is displayed. |  |
| 2 | Select Employee File | From theHomedrop-down, select My Employee File*.* | The My Employee File screen is displayed containing your profile. |  |
| 3 | Go to Benefits Section | On the My Employee File screen, scroll to the Employee Benefits section.   Note  Alternatively, you can choose the More  icon and select Employee Benefits. | The Employee Benefits section is displayed.  Continue with one or both of the two options detailed below. |  |

Option 1: via Benefits Confirmation Statement

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 4 | Go to Benefits Confirmation Statement | Select in the Current Benefits block of the Employee Benefits section the View Benefits Confirmation Statement link. | The Benefits Confirmation Statement page is displayed, containing the benefits confirmation statement as of today. |  |
| 5 | View Detailed Benefits Confirmation Statement as of Today | In the header of the benefits confirmation statement, details to the employee are displayed, like name, date of birth, and address.  The benefits you have enrolled in are listed in a table. To each enrolled benefit, details like type, start and end date, enrolled for, employee/ employer contribution, etc., are displayed. View these details. |  |  |
| 6 | View Benefits Confirmation Statement as of <Date> | Select in the View Benefits Statement As Of field a date from the calendar help. | The benefits confirmation statement as of the selected date is displayed. |  |
| View details of the benefits statement as of the selected date. |  |  |
| 7 | Download Benefits Confirmation Statement (Optional) | Choose the Download button to download the benefits confirmation statement and save it on your local disk. |  |  |
| 8 | Print Benefits Confirmation Statement (Optional) | To print the benefits confirmation statement, choose the Print button. |  |  |

Option 2: via Benefits page

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 4 | Go to Benefits page | Select in the Current Benefits block of the Employee Benefits section the Go to Benefits link. | The Benefits page is opened, containing several sections. |  |
| 5 | View Details to Enrolled Benefits | Navigate on the Benefits page to view the data displayed in each of the sections. If appropriate, select the quick card icon next to each benefit you have enrolled in, to view details about that particular benefit. |  |  |
| 6 | Go Back to Employee File Screen | When done, choose the arrow back  button on top of the Benefits page, to return to the My Employee File screen. |  |  |

## Benefits Update (Optional Sub-Process)

### Updating Benefits Enrollment

Purpose

If needed, the enrollment in a benefit can be updated. These updates may refer to changes in the enrollment amount, changes in the persons enrolled, and so on. An additional trigger for updating a benefit enrollment is a change in the employee’s personal information, which may include a change of the dependents.

If appropriate permissions have been granted to the employee, he or she will update the benefit enrollment.

In case the employee cannot access the system or has no permissions to update a benefit enrollment, then a person with the appropriate permissions (most likely a benefits administrator) can update the benefit enrollment on behalf of the employee.

In the following, both options are described.

#### Option 1: Updating Benefits Enrollment via Self-Service

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | Employee | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

If needed, the employee can edit a benefit enrollment. These updates may refer to changes in the enrollment amount, changes in the persons enrolled, and so on. The changes start being valid as of today’s date.

Prerequisite

The employee is already enrolled in the benefit. Editing permissions have been granted to the employee.

In case the update is triggered for example by a change in the employee’s marital status or a change in the employee’s family, the appropriate data must have been maintained.

 Note

In case the Core content has been deployed with the SAP Best Practices, you can refer for details on changes in the employee’s marital status to test script of scope item Data Change Employee File (FJ5).

In case the Dependents Management content has been deployed with the SAP Best Practices, you can refer for details on changes in the employee’s family data to test script of scope item Manage Dependents (1LY).

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as an Employee. | The Home page is displayed. |  |
| 2 | Select Employee File | From theHomedrop-down, select My Employee File*.* | The My Employee File screen is displayed containing your profile. |  |
| 3 | Go to Benefits Section | On the My Employee File screen, scroll to the Employee Benefits section.   Note  Alternatively, you can choose the More  icon and select Employee Benefits. | The Employee Benefits section is displayed. |  |
| 4 | Go to Benefits page | Select in the Current Benefits block the Go to Benefits link. | The Benefits page is opened, containing several sections. |  |
| 5 | Select Benefit | Go to the appropriate section and choose the Pencil (Edit) icon next to the benefit, for which you want to update your enrollment.   Note  Benefits from the open enrollment category, in which you are already enrolled, can also be updated by choosing the Edit Details button in the <benefit name> block located in the Open Enrollments subsection of the Enrollments section. | The Enrollment of <benefit name> dialog box is displayed, containing the editable fields. |  |
| 6 | Edit Benefit Enrollment | In the Enrollment of <benefit name> dialog box, the start date of the change, visible in field When would you like your changes to take effect?, defaults to today’s date and is read-only.  Adapt existing data as appropriate, for example the enrollment amount. |  |  |
| 7 | Save Data | Choose the Save pushbutton. | The message Your changes were successfully saved is displayed. The data is saved and is visible in the appropriate section of the Benefits page. |  |
| 8 | Return to Employee Files Screen (Optional) | Choose the arrow back  button on top of the Benefits page, to return to the My Employee File screen. | In the Current Benefits block of the Employee Benefits section, the enrollment amount in that benefit has been updated accordingly. |  |

#### Option 2: Updating Benefits Enrollment on Behalf of Employee

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | Benefits Administrator | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

In case the employee has no access to the system or has no permissions to update a benefit enrollment by him- or herself, the benefits administrator with appropriate permissions can do it on behalf of the employee. The benefits administrator follows the same procedure as the employee would do.

Prerequisite

The employee is already enrolled in the benefit.

In case the update is triggered for example by a change in the employee’s marital status or a change in the employee’s family, the appropriate data must have been maintained.

 Note

In case the Core content has been deployed with the SAP Best Practices, you can refer for details on changes in the employee’s marital status to test script of scope item Data Change Employee File (FJ5).

In case the Dependents Management content has been deployed with the SAP Best Practices, you can refer for details on changes in the employee’s family data to test script of scope item Manage Dependents (1LY).

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as a Benefits Administrator. | The Home page is displayed. |  |
| 2 | Search Employee | In the Search for actions or people box, in the top right corner of the screen, enter the name (or name parts) of the employee on behalf of whom you want to update a benefits enrollment. | The autocomplete functionality suggests a list of employees matching your search criteria. |  |
| 3 | Select Employee | Select the appropriate employee from the result list. | You are directed to the Employee Files page in which the profile of the employee is displayed. |  |
| 4 | Go to Benefits Section | On the My Employee File screen, scroll to the Employee Benefits section.   Note  Alternatively, you can choose the More  icon and select Employee Benefits. | The Employee Benefits section is displayed. |  |
| 5 | Update Benefits Enrollment for Employee | Update a benefits enrollment for the employee.  Proceed similar described in the Procedure of process step 4.3.1.1 Updating Benefits Enrollment via Self-Service, test steps # 4 to # 7.  The data is saved and is visible in the appropriate section of the Benefits page. |  |  |

## Benefits Claims (Sub-Process)

### Claiming Benefits

Purpose

There exist benefits where an employee incurs expense, and submits a claim, to get the money reimbursed. Most likely, the benefits that can be claimed are of type Reimbursement.

Normally, the employee will claim the benefit by him- or herself. In case the employee cannot access the system, a person with the appropriate permissions (most likely a benefits administrator) can claim the benefit on behalf of the employee.

In both of these cases, a workflow will be triggered and the employee’s HR Business Partner needs to approve the amount of money claimed before it is paid out to the employee. The employee receives an email notification about the approval of the benefits claim.

In the following, both options are described.

#### Option 1: Claiming Benefits via Self-Service

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | Employee | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

If a claim is enabled in a particular benefit, then the employee is able to claim a benefit. Most likely, the benefits that can be claimed are of type Reimbursement.

 Note

In this SAP Best Practices, the delivered benefits of type Reimbursement are Basic Tuition Reimbursement and Telephone Reimbursement. We describe the procedure for both as options. In case, you want to claim an amount for both of them, you will need to execute the described procedure separately for each of them; for each of them an approval workflow will be triggered.

Prerequisite

The employee has been automatically enrolled or has manually enrolled in benefits of type Reimbursement.

There is still some amount of money left out of the maximum amount that can be claimed.

Procedure

| Test Step # | Test Step Name | Instruction | User Entries: Field Name: User Action and Value | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as an Employee. |  | The Home page is displayed. |  |
| 2 | Select Employee File | From theHomedrop-down, select My Employee File*.* |  | The My Employee File screen is displayed containing your profile. |  |
| 3 | Go to Benefits Section | On the My Employee File screen, scroll to the Employee Benefits section.   Note  Alternatively, you can choose the More  icon and select Employee Benefits. |  | The Employee Benefits section is displayed. |  |
| 4 | Go to Benefits page | Select in the Current Benefits block the Go to Benefits link. |  | The Benefits page is opened, containing several sections. |  |
| 5 | Go to Reimbursement section | On the Benefits page, go to the Reimbursements section. |  | The Reimbursements section is displayed. It consists of the Reimbursements subsection, which on its turn consists of following blocks:   * Reimbursements   This shows the list of benefits of type reimbursements in which you have been automatically enrolled in.   * In-process Claims   This shows your claims awaiting approval.   * Recently Approved Claims   This shows your claims, which have already been approved. |  |
| 6 | Start Claim | Below the benefit for which you want to claim a reimbursement, select the Start a Claim button. |  | The Claim <benefit name> for <employee name> (of type Reimbursement) dialog box is displayed.  Depending on the benefit you want to claim, continue the process execution with either test step # 7a or # 7b detailed below. |  |
| 7a | Option 1: Claim Telephone Reimbursement | In the Claim Telephone Reimbursement for <employee name> dialog box, make following entries: | Claim Date: defaulted to today’s date; read-only field |  |  |
| Entitlement Amount: maximum amount an employee can claim for the selected benefit; read-only field |  |
| Total Claim Amount: enter an appropriate amount, which is less than or equal to the entitlement amount |  |
| Currency: defaulted to US Dollar (USD); read-only field |  |
| If needed, you can upload a supporting document. For this, select the  icon next to field Attachment. In the Choose File to Upload dialog box, browse for the document you want to upload, and then choose Open. In the upcoming success dialog box, choose OK. |  |
| Enter Remarks as appropriate. |  |
| In the Policy Documents and Useful Contacts block, you can select the quick card icon next to the employee in Contacts, to view details about the person you can contact regarding this benefit. |  | Continue with test step # 8. |  |
| 7b | Option 2: Claim Basic Tuition Reimbursement | In the Claim Basic Tuition Reimbursement for <employee name> dialog box, the fields in the Entitlement and Claim Amount block are read-only. Check the Entitlement Amount. |  |  |  |
| In the Benefit Employee Claim Detail block, select the ⊕ Add Benefit Employee Claim Detail link. The Benefit Employee Claim Detail block is expanded and the editable fields show up. Make following entries: | Amount: enter an appropriate amount, which is less than or equal to the entitlement amount |  |  |
| Description: enter as appropriate, for example the reason for claiming the amount |  |
| If needed, you can upload a supporting document. For this, select the  icon next to field Attachment. In the Choose File to Upload dialog box, browse for the document you want to upload, and then choose Open. In the upcoming success dialog box, choose OK. |  |
| Enter Remarks as appropriate. |  |
| In the Policy Documents and Useful Contacts block, you can select the quick card icon next to the employee in Contacts, to view details about the person you can contact regarding this benefit. |  | Continue with test step # 8. |  |
| 8 | Save Data | Choose the Save pushbutton. |  | A workflow is triggered. The Please confirm your request dialog box appears on the screen. |  |
| 9 | Enter Comment to Request | In the dialog box, enter an appropriate comment to your request, if appropriate. |  |  |  |
| 10 | Check Approver | In the dialog box, select the Show workflow participants link to verify the approver of the request. |  | Your HR Business Partner is shown as approver. |  |
| 11 | Confirm Workflow | Select the Confirm button. |  | The message Your changes were successfully saved is displayed. The workflow has been sent to the next processor. The claim is displayed in the In-process Claims block. In the Reimbursements block, the Amount used chart below the appropriate benefit is updated accordingly. |  |
| 12 | Return to Employee Files screen (Optional) | Choose the arrow back  button on top of the Benefits page, to return to the My Employee File screen. |  | In the Current Benefits block of the Employee Benefits section, the amount of reimbursement still available from the entitlement amount has been updated accordingly. |  |

 Note

In case email is configured and the email address of your HR Business Partner is maintained in the system, he or she receives an automatic email about the workflow item needing his or her attention.

 Recommendation

Continue in the process execution with process step 4.4.2 Approving Benefits Claim and subsequent.

#### Option 2: Claiming Benefits on Behalf of Employee

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | Benefits Administrator | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

In case the employee has no access to the system and thus cannot claim a benefit by him- or herself, the benefits administrator with appropriate permissions can do it on behalf of the employee. The benefits administrator follows the same procedure as the employee would do.

Prerequisite

The employee has been enrolled in benefits of type Reimbursement.

There is still some amount of money left out of the maximum amount that can be claimed.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as a Benefits Administrator. | The Home page is displayed. |  |
| 2 | Search Employee | In the Search for actions or people box, in the top right corner of the screen, enter the name (or name parts) of the employee on behalf of whom you want to claim benefits. | The autocomplete functionality suggests a list of employees matching your search criteria. |  |
| 3 | Select Employee | Select the appropriate employee from the result list. | You are directed to the Employee Files page in which the profile of the employee is displayed. |  |
| 4 | Go to Benefits Section | On the My Employee File screen, scroll to the Employee Benefits section.   Note  Alternatively, you can choose the More  icon and select Employee Benefits. | The Employee Benefits section is displayed, containing the Current Benefits and Benefits blocks. |  |
| 5 | Claim Benefits for Employee | Claim benefits for the employee.  Proceed similar as in the use cases described in the Procedure of process step 4.4.1.1 Claiming Benefits via Self-Service, starting test step # 4. |  |  |

 Recommendation

Continue in the process execution with process step 4.4.2 Approving Benefits Claim and subsequent.

### Approving Benefits Claim

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | HR Business Partner (of employee) | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

The HR Business Partner of the employee approves the benefits claim submitted by that employee. Until the claim request is approved, it is displayed in the In-process Claims block of the Reimbursements section in the employee’s profile.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Log on to Employee Central as an HR Business Partner. | The Home page is displayed. |  |
| 2 | Access Requests Tile | On the Home page, go to theTo Dosectionand click on the Approve Requests tile. | The Approve Requests dialog box is displayed, containing a list of all the requests you need to approve. For each request, high level details are given, which depend on the request type. |  |
| 3 | Select Claim Request | In the Approve Requests dialog box, click on the Benefit Employee Claim for <Employee Name> link.   Note  In case you have several requests in the tile, select the Go to Workflow Requests link located at the bottom right of the Approve Requests dialog box. The My Workflow Requests (#) screen is displayed. If appropriate, click More, to have the complete list of requests. Select the Filter  icon to search for the request you need to approve. In the filter criteria fields, which show up, make entries as appropriate. For example, enter for field Request Type value Change Generic Object Actions and for field Object value Benefit Employee Claim, then choose the Go button. In case you obtain several results for your search, you have the option to sort the requests, for example based on the date you received them, in order to ensure their timely completion. Select the Sort cid:image064.png@01D2EF17.DB16DA80 icon and in the menu, that expands, check the appropriate radio-buttons and choose Apply. In the result list, click on the appropriate Benefit Employee Claim for <Employee Name> link. | The Employee Files > Workflow Details screen is displayed containing details to the benefits claim request. The screen is divided in several sections:   * The Do you approve this request? section contains a short overview of the request, its initiator, and the workflow participants. * The Benefit Employee Claim section contains the detailed request. * In the Comment section, you can post your remarks to the request. * On the right part of the screen a short profile of the employee for whom the claim is requested is given, as well as administrative details to the request initiation. |  |
| 4 | Review Employee Benefit Claim | Review the details in the Benefit Employee Claim section. | The data for the benefit claim has been reviewed and is ready for approval. |  |
| 5 | Approve Request | If everything is fine, choose the Approvebutton to approve the benefit claim request. | The system generates a message about the successful approval of the workflow. You are directed back to your Home page.   Note  In case you have approved the request starting from the My Workflow Requests (#) screen (see Note in test step # 3), you are directed back to this page; the number of requests you still need to approve has decreased by 1. If appropriate, you can process other requests as per your requirement. Once there is no request left for you to approve, the My Workflow Requests (#) screen will have no entry anymore and the Approve Requests tile will no longer be visible in the To Dosection of your Home page. |  |

 Note

If required, you can also send the claim request back for further details. In this case, it is recommended to add a comment explaining your decision. The employee (or benefits administrator) can then either adapt the claim request and resubmit it for approval, or cancel it.

Result

The benefits claim has been approved. It is visible in the Recently Approved Claims block of the Reimbursements section in the employee’s file and can be viewed by the employee.

#### Sending E-mail Notification about Employee Benefits Claim Approval

Purpose

After the benefit claim has been approved, an email is sent out to the employee notifying him or her about the claim approval

Prerequisites

The email address of the employee needs to be maintained in the employee file in the Contact Information block (located in the Contact Information subsection).

Procedure

This is an automated step, and no manual execution is required.

#### Receiving E-mail Notification about Approval of my Benefits Claim

Purpose

The Employee has received an email notification informing him or her that the benefits claim has been approved.

Procedure

This is an automated step, and no manual execution is required.

### Viewing my Approved Benefits Claim (Optional)

Test Administration

Customer project: Fill in the project-specific parts (between <brackets>).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name | <name> | Testing Date | <date> |
| Business Role(s) | Employee | | | | |
| Responsibility | <State Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | <duration> |

Purpose

After having received the email notification about the approval of the benefits claim, the employee can view the approval details in the system.

Procedure

| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| --- | --- | --- | --- | --- |
| 1 | Log on | Go to your e-mail inbox and search the e-mail sent by the SAP SuccessFactors service mailbox.  Note  The subject of this email states something like “The Create Benefit Employee Claim action for <your name> has been approved.”  Open this e-mail and choose the available hyperlink. You are directed to the Employee Central login screen, where you need to enter your password (your username is already filled by default). | You are directed to the My Employee File > Workflow Details page, containing details to the completed workflow request. |  |
| 2 | View Workflow Details | View the workflow details visible in the different sections and subsections. |  |  |
| 3 | Go to your Employee File screen | Choose the Back to: Profile Page link on the top left corner of the page. | You are directed to the My Employee File screen, in which the Personal Information section is displayed per default., |  |
| 4 | View Approved Benefits Claim | Navigate to the Employee Benefits section. Select in the Current Benefits block the Go to Benefits link. On the Benefits page, go to the Reimbursements section.  Check, that your approved benefit claim is visible in the Recently Approved Claims block of the Reimbursements section. |  |  |

Result

The claimed amount of money will be paid out to the employee during payroll.

# Appendix

## Process Chains

The process to be tested in this test script is part of a chain of integrated processes.

In the assumption that the Employee Central related content in your instance has been deployed with the SAP Best Practices, you can test following business processes.

### Preceding Processes

You may first have completed the following processes and conditions before you start with the test steps:

| Process | Business Condition |
| --- | --- |
| In case the Core content has been deployed: Add New Employee / Rehire (FJ0) | Employees must have been hired (or rehired) and already exist in the system. |
| In case Dependents Management has been deployed: Manage Dependents (1LY) (Optional) | In case dependents of the employee should also be enrolled in the employee benefits, data of these dependents needs to be maintained in the system. |

Typographic Conventions

| **Type Style** | **Description** |
| --- | --- |
| Example | Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options.  Textual cross-references to other documents. |
| Example | Emphasized words or expressions. |
| EXAMPLE | Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE. |
| Example | Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools. |
| Example | Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation. |
| <Example> | Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system. |
| EXAMPLE | Keys on the keyboard, for example, F2 or ENTER. |

|  |
| --- |
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