OSC TRAINING

PA310

Create and Maintain Employee Data

TRAINING COURSE

State of North Carolina

Office of the State Controller

April 14, 2016

For assistance with any TRAINING needs, contact:

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Introduction

Introduction

Overview

The course introduction is an opportunity to get to know the others who are attending class as well as to agree on classroom courtesy. The instructor will inform you about the building facilities and when breaks will occur.

Know that the late arrival session policy exists for Day 2 of class as well as the first day. If you are late the second day (past the first 30 minutes of class), you will be asked to take the second day of class the next time it is offered.

NOTE: PA is the acronym for Personnel Administration.

Pre-requisites

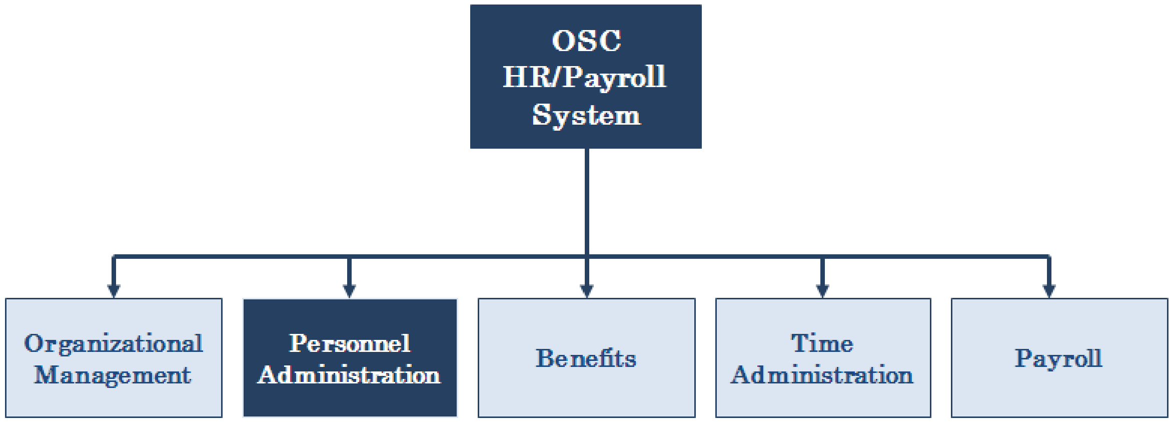
- PA210 - Personnel Administration Terms, Concepts, and Display Data

There is only one prerequisite you must take before attending this course. Attending this prerequisite ensures that you are adequately prepared with the new processes, concepts, and terms that are needed for successful completion of the *Create and Maintain Employee Data* course.

PA210 can be taken either virtually or through an instructor-led classroom.

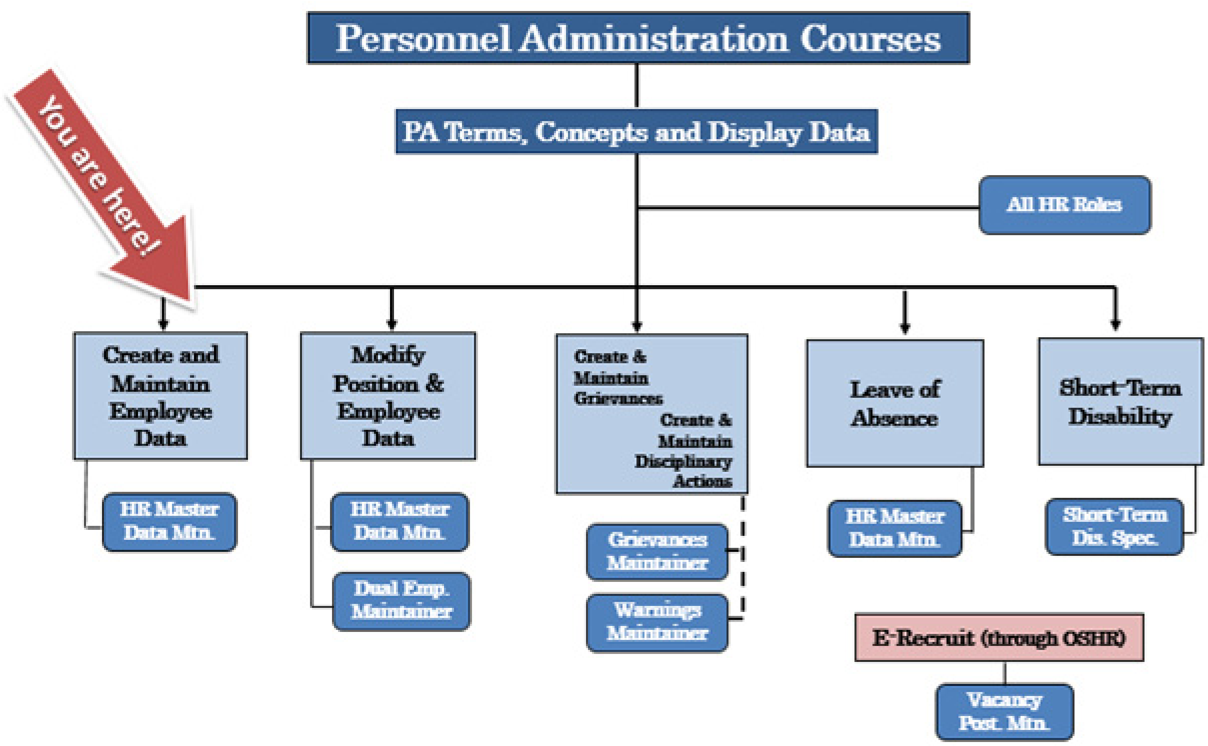
PA313 is the class that follows the PA310 class. It is offered both as an instructor-led or virtual course. After successful completion of PA313, the requirements for the HR Master Data Maintainer security role will be completed.

OSC HR/Payroll Training Curriculum



The OSC HR/Payroll training program comprises several courses and different modules. Based on your HR role, you will attend courses in the *Personnel Administration* module.

PA Curriculum by Security Role



Within the Personnel Administration module, there are several courses. Your position/security roles determine which courses you may be required to attend.

Strategy for Training

Tell Me (Concepts)

- Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN

Show Me (Demonstrations)

- Instructor will demonstrate job-related tasks performed in the OSC HR/Payroll system – HANDS OFF.

Let Me (Exercises)

- Student will complete the exercises which allows for hands-on practice in class – HANDS ON

Support Me (Availability)

- Instructor will be available to answer questions while the students complete the exercises

Course Map

You can see the Course Map of the class at the beginning of each lesson. The bolded and larger text indicates which lesson you are beginning.

The lessons covered in this class include:

- Lesson 1: Review of PA Infotypes
- Lesson 2: Introduction to Actions
- Lesson 3: Entering Employees in the HR/Payroll System
- Lesson 4: Adjusting Salaries
- Lesson 5: Promoting Employees
- Lesson 6: Separating Employees
- Lesson 7: Entering Transfers
- Lesson 8: Workflow Process & Inquiry
- Lesson 9: Reviewing Additional Actions
- Lesson 10: Course Review

The *Create and Maintain Employee Data* Student Guide can be used as a reference when you return to the workplace. For example, you can use the exercises for practicing in the HR/Payroll system training environment.

You may also find it useful to take the Employee Self-Service and Manager Self-Service courses although they are not required for the PA curriculum. They are, however, mandatory for other requirements.

Course Objectives

Upon completion of this course, you should be able to:

- Describe the process for the various Actions
- Create new records associated with the life cycle of an employee
- Modify existing employee data
- Understand Workflow from the beginning of the process to completion

Reference Materials

- Student Guide
- OSC Training HELP website
  - — Job Aids
  - — Work instructions - Business Process Procedures (BPPs)
  - — Support Material Updates - *"What's New"*
- Other Resources
  - — Online help - from the SAP portal

SUMMARY

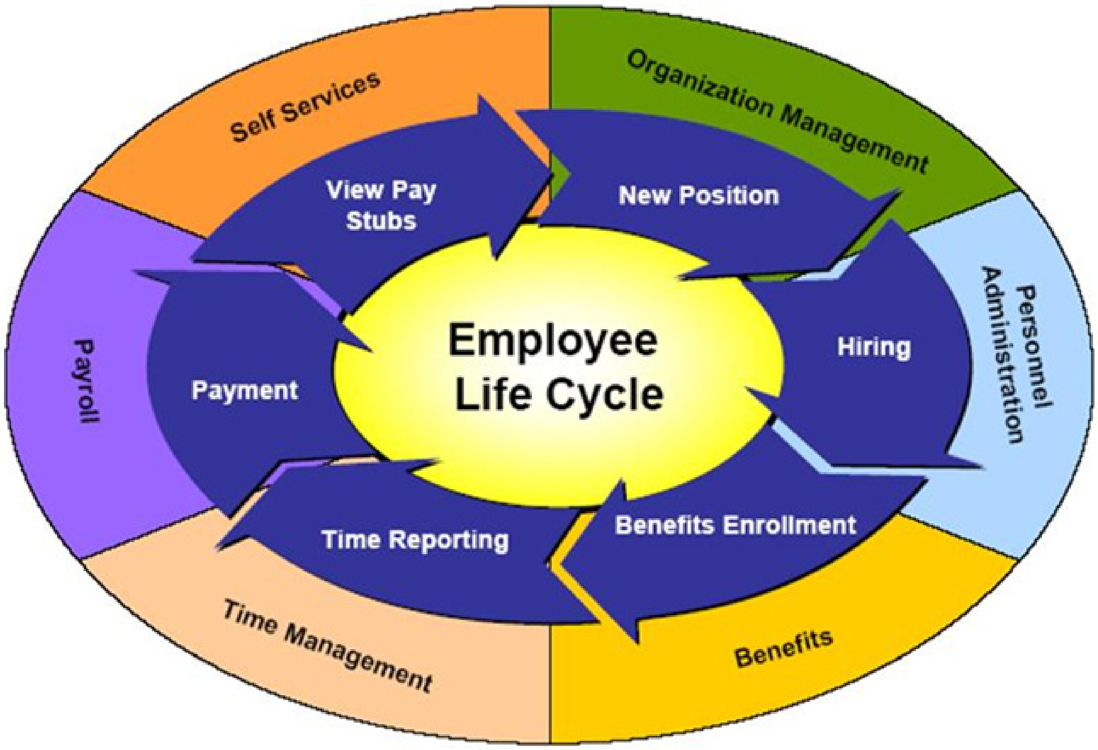
This course is intended to give HR professionals an understanding of the HR/Payroll system Personnel Administration module. This course will provide you with demonstration and practice for creating and modifying employee data.

Review of PA Infotypes

Objectives

- Recall terms and concepts from the *PA210 Terms, Concepts, and Display Data* course.
- Understand that entries made in PA affect an employee's time, benefits, or pay.
- Review the various Infotypes in PA Actions.

HR/Payroll System Integration



Based on the data you viewed in *PA210 Terms, Concepts and Display Data*, you should have a good understanding of the various infotypes that are part of an employee's personnel record. Because the OSC HR/Payroll is an integrated system, every entry made in Personnel Administration affects some component of an employee's time and pay.

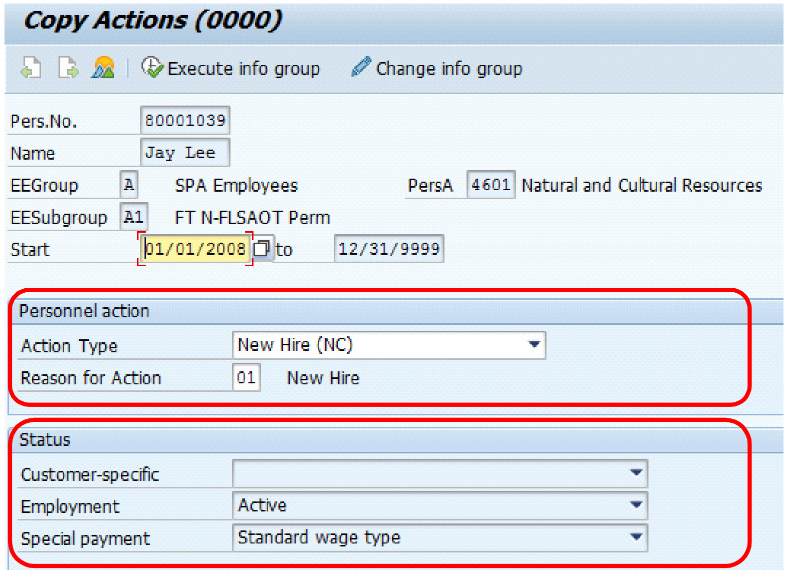
Some infotypes for which PA is responsible are applied directly to the employee. Many of the infotypes that affect an employee's time and pay display automatically during PA Actions. Other infotypes are applied to the position which also affect how the employee enters time and is subsequently paid.

PA Infotypes and Time, Benefits & Payroll

- IT0000 - Actions
- IT0001 - Organizational Assignment
- IT0002 - Personal Data
- IT0006 - Address (permanent)
- IT0007 - Planned Working Time
- IT0008 - Basic Pay
- IT0041 - Date Specifications
- IT0552 - Time Specification / Employ. Period
- IT2003 - Substitution
- IT2001 - Absences

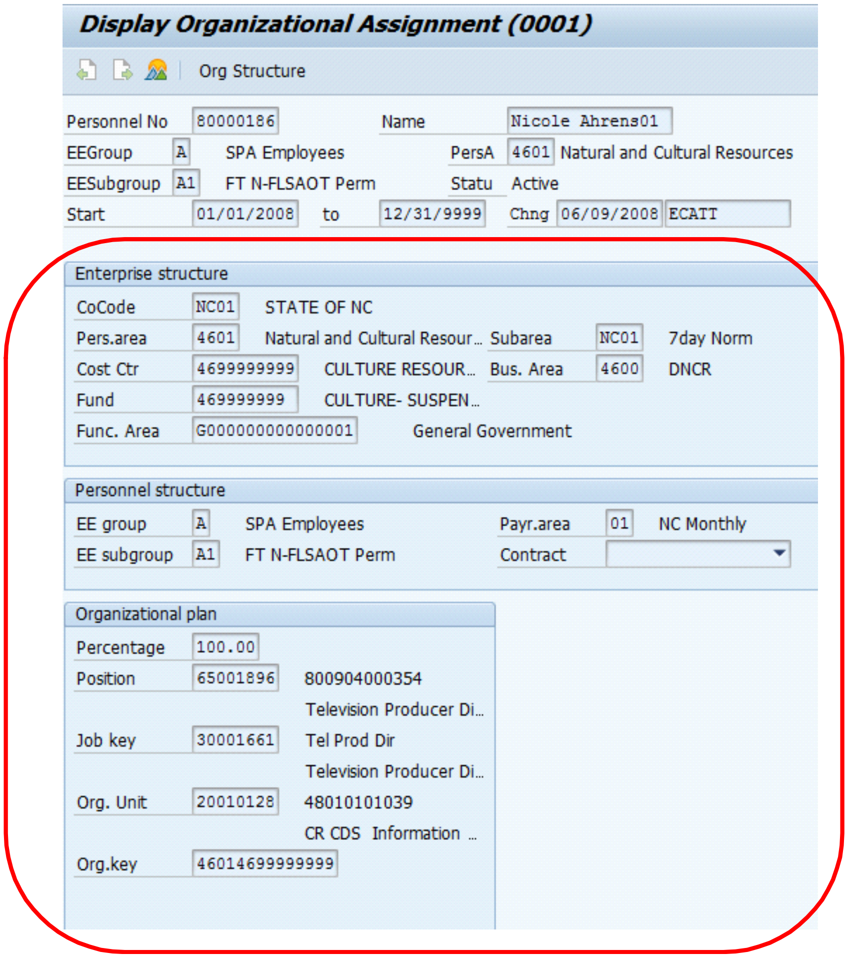
The infotypes listed above are entered in PA, but affect an employee's time, benefits and payroll. It is important to understand how the entries made in PA are related to results in those areas. Note that the above list represents only a few PA infotypes; it is in no way a complete list of all PA infotypes.

Actions - IT0000



The **Actions IT0000** infotype indicates the events that occurred on the employee's personnel record. Some examples are: New Hire, Promotion, Range Revision, etc. Actions are covered in more detail later in the class. In addition, the infotype shows the employment status (Active, Inactive, Withdrawn). Time, Payroll and Benefits use information from IT0000.

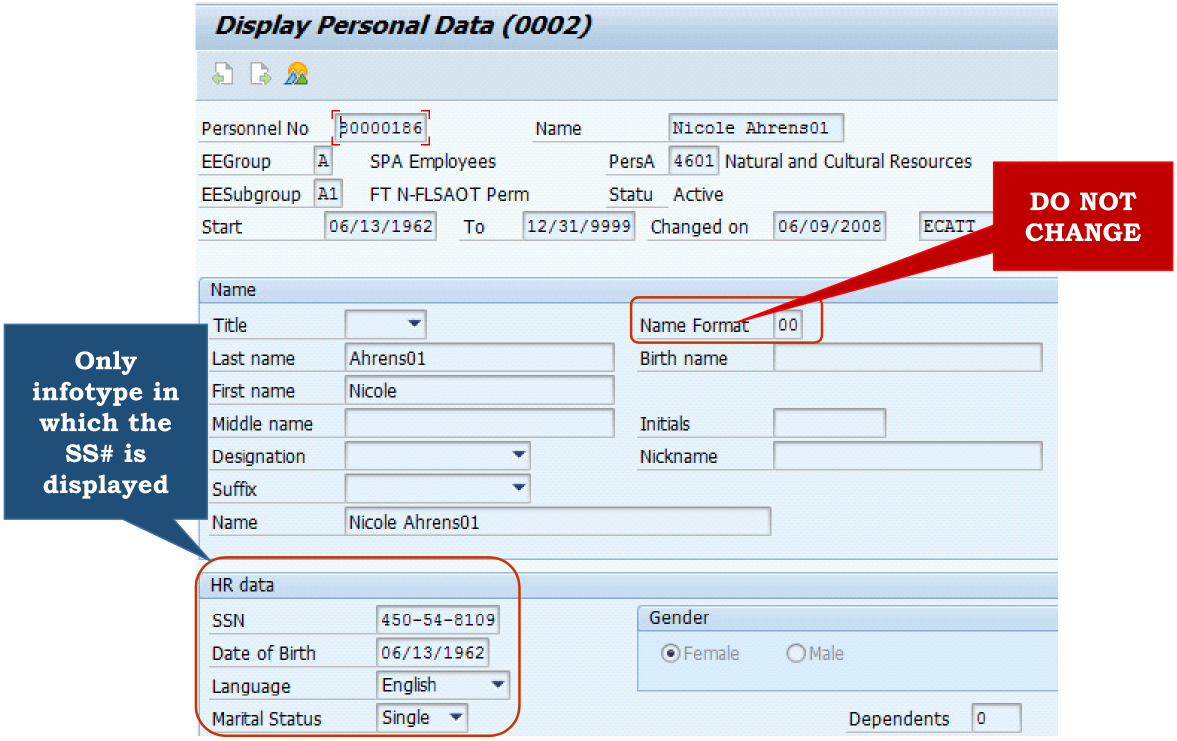
Organizational Assignment - IT0001



Time, Payroll and Benefits pull information from **Organizational Assignment IT0001**. All of the fields on this infotype default from the position assigned to the employee.

- **Personnel area**: Used by Payroll to determine where wages and salaries are posted and from where they are paid
- **Subarea**: Identifies various working schedules for Time Management rules
- **Cost Center, Fund, Functional Area, Business Area**: Are related to Finance and Funding
- **Employee Group**: Drives benefits eligibility, leave and pay calculations
- **Employee Subgroup**: Defines work status (full time, part time) overtime rules, and impacts benefits
- **Payroll area**: Determines the payroll cycle
- **Contract**: Identifies if employee will pay full or partial cost for health insurance premiums and retiree status
- **Percentage**: Always 100%
- **Position and Job**: The position to which the employee is assigned and the job to which the position is related
- **Organizational Unit**: An entity within the organizational structure

Personal Data - IT0002

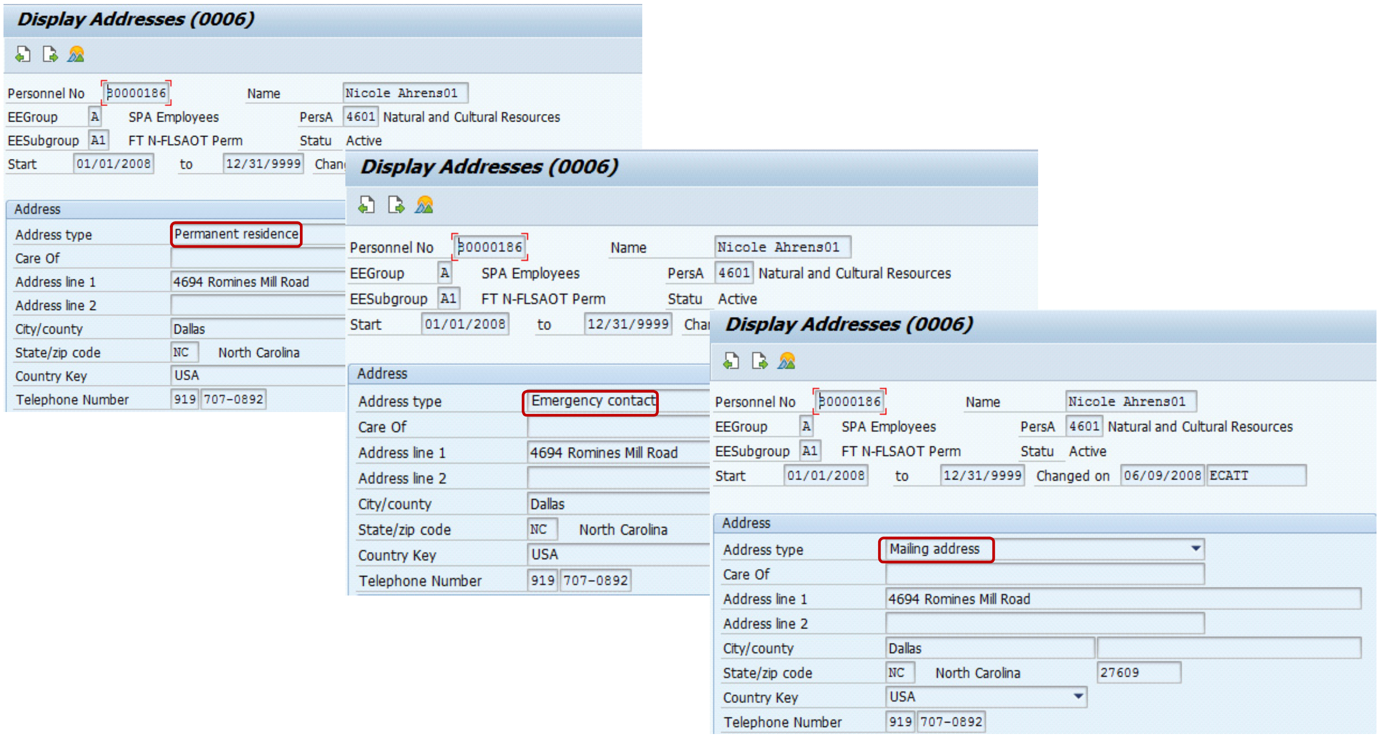


The **Personal Data (IT0002)** infotype displays Social security number, date of birth and marital status—information that is important for tax reporting, payroll, and benefits.

- **NOTE**: All personal data changes must be maintained by BEST HR.
- **Critical!** – <u>Do not change</u> the *Name Format* field default. This field should **ALWAYS** be "00".

> **CRITICAL**: If you skip this infotype in the New Hire Action, you will have to provide BEST HR with the information to create the infotype. That is why it is very important to Save the action.
>
> The lack of an Infotype 0002 causes errors on interfaces, PERNRs with no names, etc.
>
> You must save during the PA40 Action. <u>You cannot maintain in PA30.</u> If you do not save this infotype, you may receive a call from the OSC HR/Payroll Functional team as to why it was skipped.

Addresses - IT0006

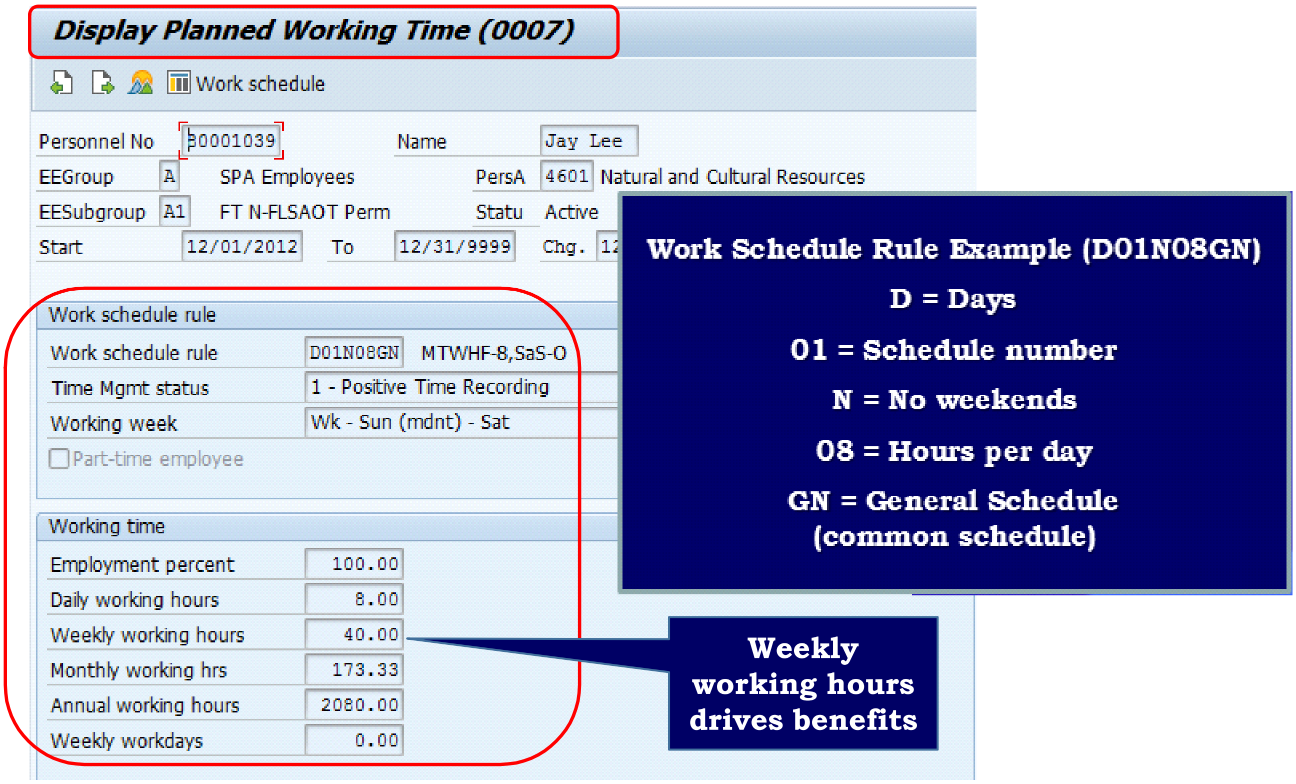


The various tax infotypes (Residence Tax, Work Tax Area, Unemployment State) are dynamically associated with IT0006 – permanent address. If IT0006 is skipped during the New Hire Action, the tax infotypes do not display, and the employee's record will error out in payroll.

🗁 NOTE: When entering an address, always select the appropriate subtype and begin with *Address line 1* and only use *Address line 2* when necessary to enter additional address information. (There is a limitation of 32 characters on each line.)

If the address information is incorrect, employees do not receive W2s at the end of the year.

Planned Working Time - IT0007



The Work Schedule Rule (WSR) is the foundation upon which an employee's time is processed in the HR/Payroll system. Each employee is assigned a WSR in PA that best represents his or her work pattern. The WSR combines an assigned holiday calendar (the main State holiday calendar or an alternate calendar approved by OSHR) with a repeatable pattern of work representing an employee's scheduled work days as well as scheduled non-work days. The WSR can represent work patterns repeated over a single or multiple weeks and may include day, evening and night shift designations that trigger premium payments (if applicable) at rates designated on the employee's position (if the position is appropriately flagged). The WSR does not limit the number of hours an employee may record on any given day, but will only allow leave to be taken on scheduled work days. Many fields are dynamic and trigger other time functions. For example, Time Sheet Defaults (IT0315) are directly related to the Time Management Status field on IT0007. A Time Mgmt Status of "1" indicates that a time sheet is required, whereas a "9" indicates a Time Sheet is not required. If a negative time employee is on Leave of Absence, IT0007 must be revised to change the employee to positive during the Leave and changed back to negative upon Reinstatement/Reemployment. The Employment percent field should always be 100%.

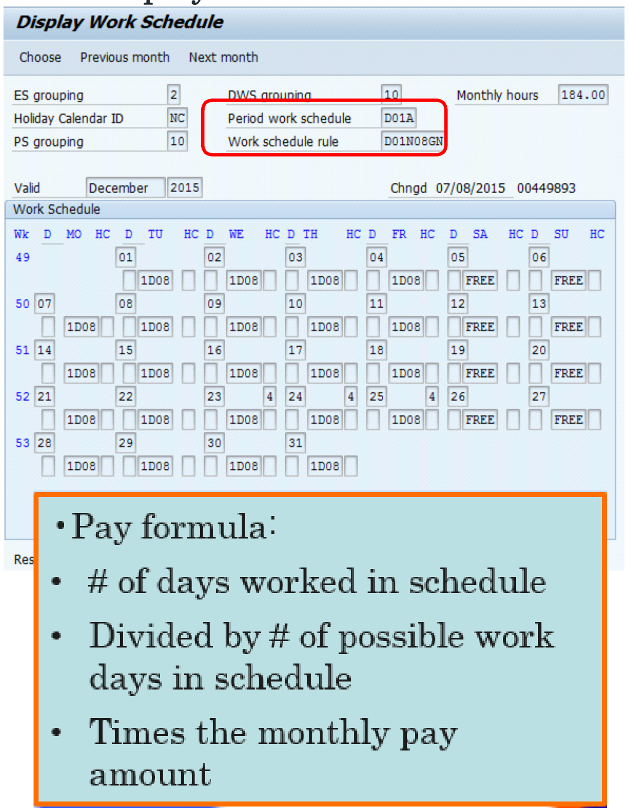
An employee should only be assigned as a negative time employee if he or she is working 5 days a week, 8 hours a day.

Enter the number of hours this individual will work per week, and click Enter to have the system validate the details. The Planned Working Schedule and Time Mgmt status defaults from the employee's enterprise structure.

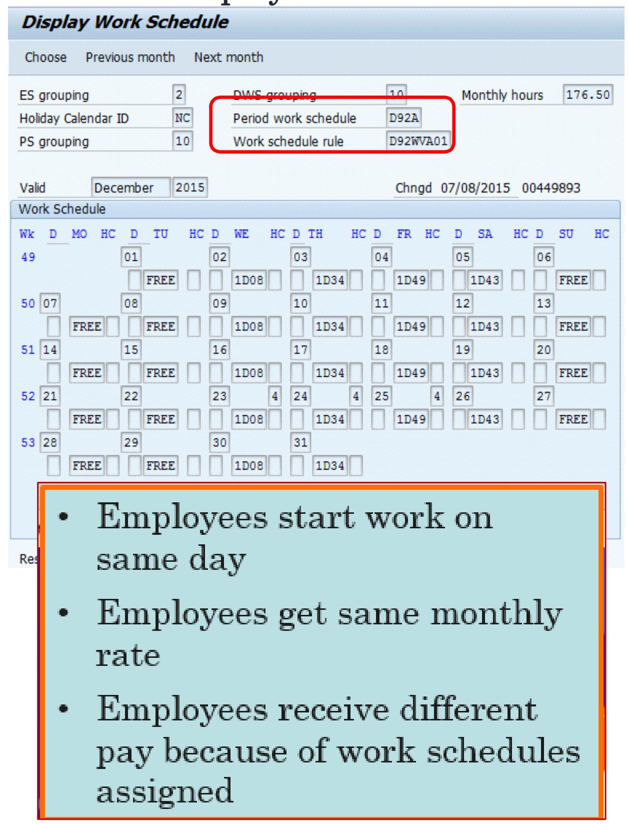
It is critical that you review for correctness (including the working week) and change the work schedule as appropriate for the employee if it is different from the one that defaults. If the individual is part-time, be sure to check the Part-time employee box. The defaulted work schedule is based on information provided by the various agencies and OSC HR/Payroll system team members.

Work Schedule Comparison - Example

Employee A – IT0007



Employee B – IT0007



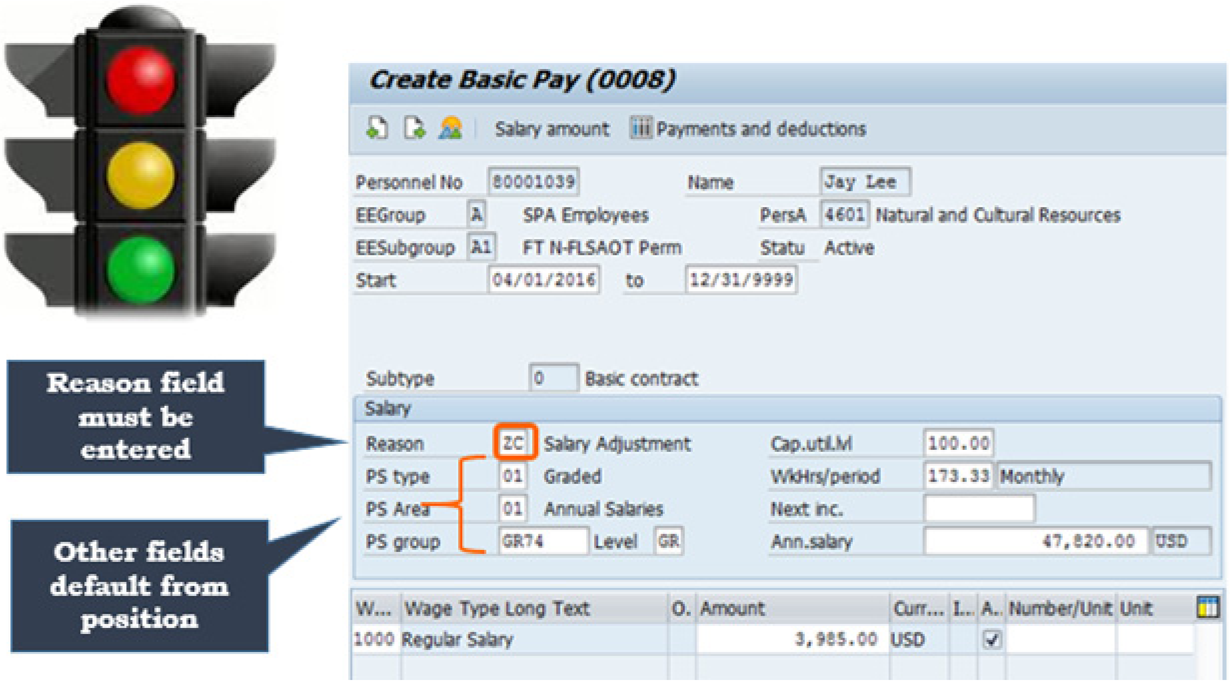
To show how IT0007 affects an employee's pay, the following describes two employees hired on the same day but given two different work schedules. Both employees are paid $6,250 monthly salary.

Employee **A** starts on Sept. 19 and is assigned work schedule D01N08GN which has 22 possible work days in the month. Counting Sept. 19th, the employee worked 8 days of the possible 22. The Pay is figured by this formula: 8 days divided by 22 times the monthly rate ($6,250) = $2,272.73 paid for the month for Employee A (based on IT0007 and IT0008).

Employee **B**'s work schedule (D92WVA01) has 16 possible work days in the month. Counting the first day Employee B reported to work (9/19), the employee worked 6 out of the 16 days. The number of days worked (6) divided by the possible work days (16) times the monthly salary ($6,250) calculates a pay of $2,343.75.

You can see that both employees were paid correctly, yet the specific work schedule, in conjunction with IT0008, determined two different pay outcomes for the employees once again illustrating how entries made in PA affect employee pay or time.

Basic Pay - IT0008



On the Basic Pay (IT0008) infotype, the pay scale values (pay scale type, pay scale area, pay scale group and level) have been designed to default based on the rules assigned to the employee's position. If the pay scale values do not default, please contact BEST Shared Services or your BEST HR Specialist.

🗁 NOTE: If the Level field is not entered on the PCR, it will not default on the infotype. You must then enter it later. If left blank, it will cause some fields on BI reports to be blank.

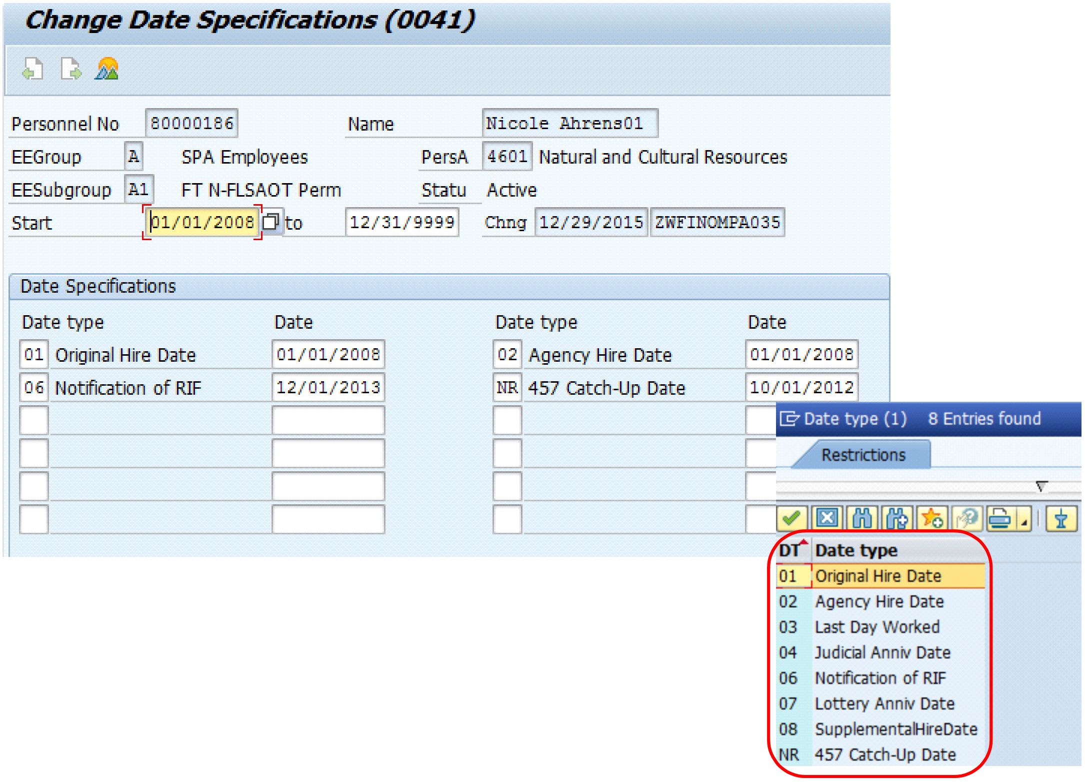
Enter the Reason for the action (in the case of a New Hire there is only one reason), and the person's Amount if hourly. Click Enter and the system will validate the salary and provide the hourly rate.

🗁 NOTE: If the person is on an hourly position, enter their HOURLY rate, and the system will calculate their salary.

- *Reason* - enter or select from the drop-down menu
- *Next increase* - this field is blank except for the Judicial Branch, which uses it to track the next increase for employees in specific Jobs.
- *Annual Salary* - populates from the workflow, verify this field for accuracy
- *Amount* - will be blank; if the employee is paid hourly instead of annually, enter the hourly amount in the Amount field
- *Number/Unit* - will be blank
- *Unit* - will be blank

🗁 NOTE: Employees can be different from the position. For example, the position may be annual salary and the employee may be hourly (if Supplemental Staff working against a permanent position).

Data Specifications - IT0041



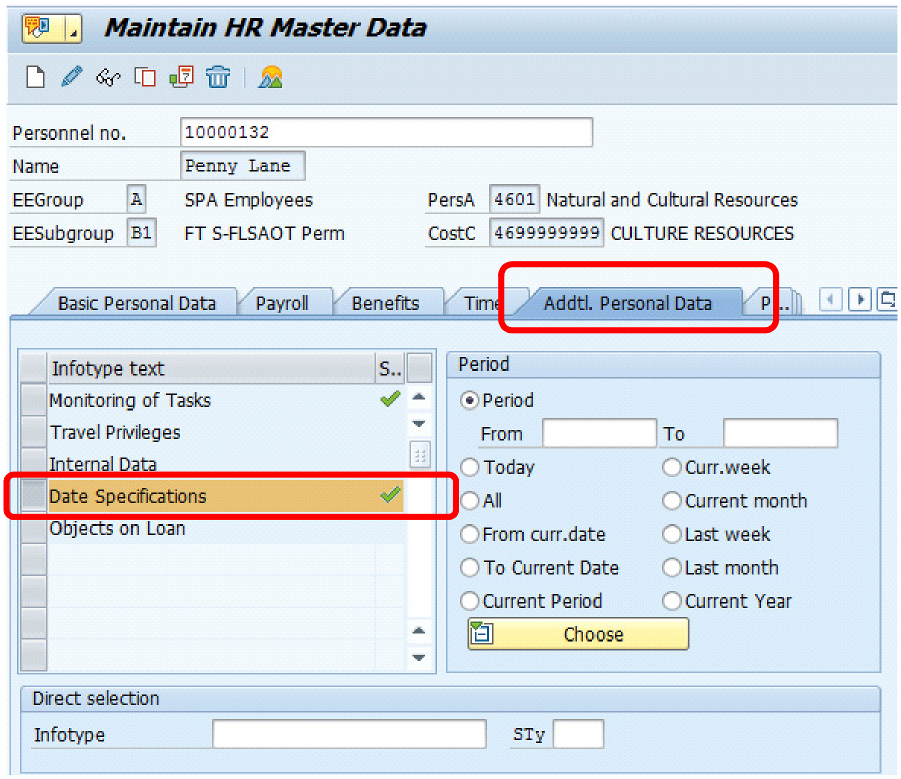
Action	Defaulted Dates Types (Agency may change date based on OSHR/Agency Policy/Guidelines
Z0 - New Hire Z7 - Non-Beacon to Beacon ZS – Adjusted Hire Date	01 – Original Hire Date 02 – Agency Hire Date 04 – Judicial Anniv Date (for specific Judicial Jobs)
ZG - Separation	03 – Last Day Worked (defaults date from PCR)
Z2 – Reinstatement/Reemployment (from LOA)	Copies existing date types with effective date of action. Agency can change date types if required.
Z2 – Reinstatement/Reemployment (from Separation)	02 – Agency Hire Date 04 – Judicial Anniv Date (for specific Judicial Jobs) 07 – Lottery Anniv Date (All of Lottery except Temps)
Z8 – Transfer (within Agency)	Copies existing date types with effective date of action. Agency can change date types if required.
Z8 – Transfer (Agency to Agency)	02 – Agency Hire Date 04 – Judicial Anniv Date (for specific Judicial Jobs)
Z8 – Transfer (Temp to Perm)	01 – Original Hire Date 02 – Agency Hire Date 04 – Judicial Anniv Date (for specific Judicial Jobs)

NOTE: For AOC, time evaluation bases longevity payments for employees that are eligible for monthly longevity on date type 04.

NOTE: IT0041 was created November 1, 2013 for all Supplemental Staff.

CRITICAL!
Use caution when adjusting the validity dates of the copied record. If the validity dates are set to dates in the past, then the dates will be used in any retro-calculations triggered by Time Evaluation. If the only change to the record involves adding another date type, then use the current date as the new validity From date and 12/31/9999 as the new validity To date.

CHANGING DATE SPECIFICATIONS



There is a need to change a date on an employee's record to accurately reflect their career with the State. The date specification is changed on an employee's record and is processed via transaction code PA30. Always use **COPY** to keep a record of the historical date specifications.

The date specification:

- Stores date types that are used by Time Evaluation and date types that are relevant for other HR functions.
- Usually maintained within an Action or via PA30.

Date Specifications:

- 01 – Original Hire Date
- 02 – Agency Hire Date
- 03 – Last Day Worked
- 04 – Judicial Anniversary Date (specific Judicial employees)
- 06 – Notification of RIF
- 07 – Lottery Anniversary Date
- 08 - Supplemental Hire Date
- NR – 457 Catch-Up Date

> **NOTE**: These fields are included on interfaces and reports. Therefore, it is very important for the fields to be correct.

Additional Resources
You can find several additional support materials about Date Specifications on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/ Follow this path to access the latest version of Date Specification Job Aids: *Personnel Administration > Job Aids* • Change Date Specifications • Longevity

KNOWLEDGE CHECK

Which infotype...	Answer
1. Displays the SSN, date of birth and marital status?	
2. Displays the emergency contact information?	
3. Captures the events that occur on an employee's personnel record?	
4. Do you enter a Reason code on the Basic Pay infotype? (system will not require this...you must remember to enter the code.)?	
5. Houses the Work Schedule Rule (WSR)?	

SUMMARY

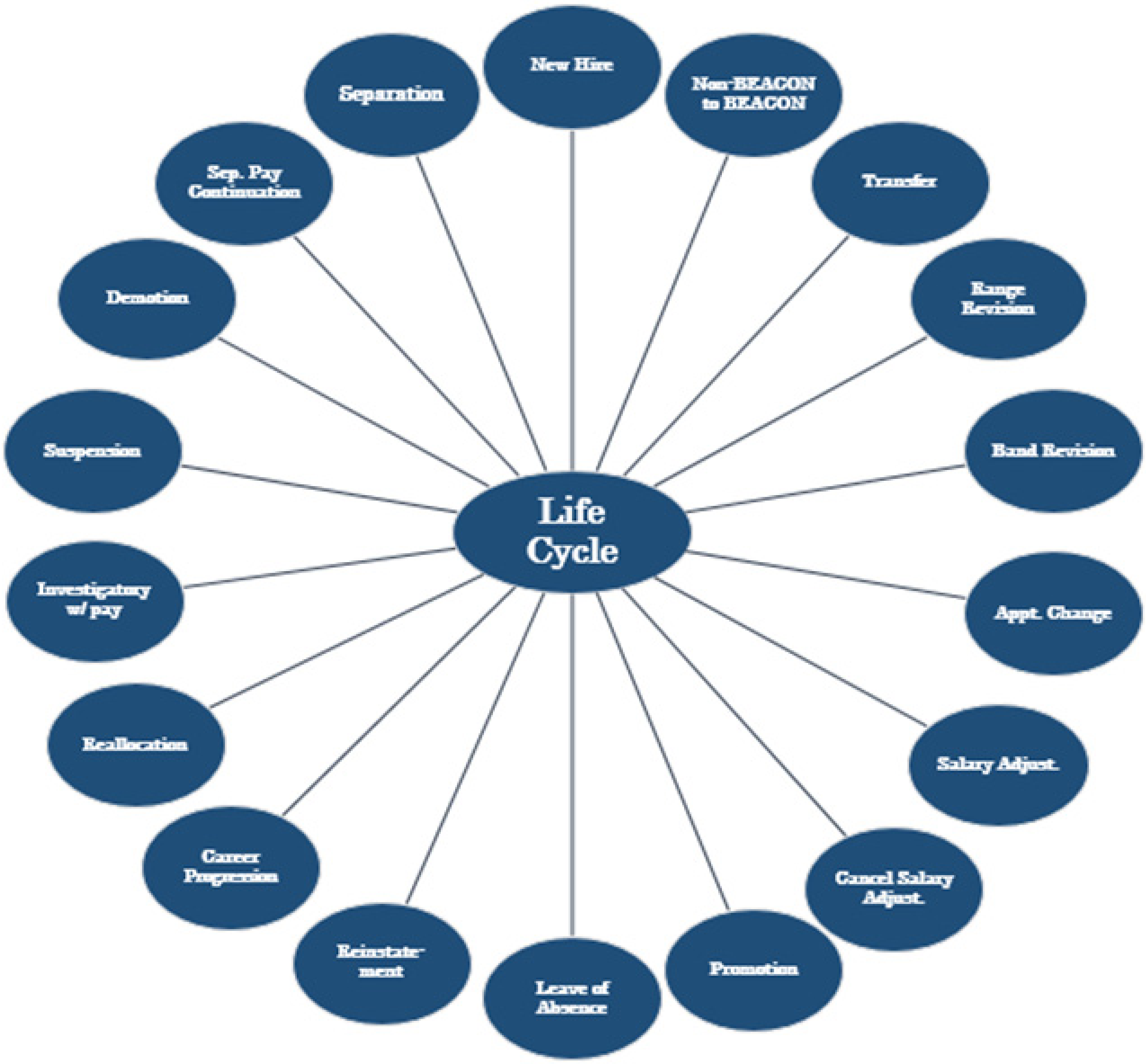
This lesson reviewed terms and concepts from the *PA210 Terms, Concepts, and Display Data* course. It also demonstrated how entries made in PA affect an employee's time, benefits, or pay. The lesson also reviewed the various Infotypes in PA Actions.

Introduction to Actions

Objectives

- Describe the various Actions associated with the life cycle of an employee
- Identify how to access help
- Describe various helpful tips and tricks
- Explain the Workflow process

Actions



As discussed in the *PA Terms, Concepts and Display Data* course, the life cycle of an employee comprises many different events. the HR/Payroll system defines those events as a specific infotype called **Actions (IT0000)**. Actions for the State of North Carolina are shown above. LOA stands for Leave of Absence.

An Action combines logically related infotypes into one infogroup. The infotypes in the infogroup are sequentially arranged and automatically display. This helps to simplify the data entry for the Action. You do not have to remember whether a particular infotype should be included—the HR/Payroll system automatically includes the infotypes that are associated with a particular Action. Depending upon the employee's specific data, you may not need to enter data on each of the infotypes presented in the Action.

Each Action has one or more reasons that are associated with the life cycle event. When you create an Action in the HR/Payroll system you determine and select the appropriate reason for the employee's life cycle event.

With the Actions infotype (IT0000) you can display an overview of all the important changes related to an employee, and you can thus document the most important stages an employee passes through in his or her history with the State. Only the current data was downloaded into the HR/Payroll system.

🗁 Refer to BI Reports for employee history.

Actions You will Create in this Class

- New Hire
- Non-BEACON to BEACON
- Reinstatement / Reemployment
- Salary Adjustment
- Appointment Change
- Reallocation
- Promotion
- Transfer
- Separation
- Separation with Pay Continuation

The State of North Carolina has a variety of Actions that you will use. However, in this course, you will only create a selected few, as listed above. This course is designed to give you the opportunity to learn four basic functions: getting an employee into the system, making salary adjustments based on work events, transferring and separating the employee. Additional Actions are discussed, although specific exercises are not performed in this class. Leave of Absence is covered in a subsequent class, *PA420 Leave of Absence*, *PA425 LOA - Military*, as well as in *PA370 Short-Term Disability*.

The demonstrations and exercises that are presented hereafter assume that all necessary policies and procedures have been followed, and appropriate forms, etc. have been submitted and approved. **All of the approvals and processes that you had to do prior to the HR/Payroll system are still the same**.

In addition, the necessity of keeping appropriate hard copies of personnel records (applications, reviews, etc.) remains. These documents should still be saved and stored as they were prior to the HR/Payroll system.

PA Support Materials

We will access the Training HELP website and view the following PA support materials as we go through the course:

- Personnel Areas and Subareas
- Employee Groups and Subgroups
- PA Infotypes
- PA Actions Reasons and Definitions
- Business Process Procedures (BPPs)
- Other Job Aids as necessary
- Tutorials

The instructor will show you how to display various online job aids located in the Training HELP website: http://www.osc.nc.gov/training/osctd/help/

Data System Functions

- **Create:** Create a new infotype for an existing employee.
- **Change:** **Do not use!** A decision has been made that HR/Payroll system users will use the Copy function with the original date to overwrite existing data and correct data. You will not use the Pencil icon. You can only correct a current (not historical) record. Only BEST Shared Services can make changes to historical records.
- **Delete:** **Do not use!** Only BEST can perform this with OSHR approval. Eliminate a record. This function should be used with caution, because it permanently removes the information from the database, and cannot be retrieved.

Best Business Practice: Have BEST Shared Services make these changes.

- **Delimit:** Enter an end date on an infotype to make it inactive.
- **Copy:** Modify or update an infotype to ensure that history is maintained (as long as you change the effective date accordingly). If you don't use a new effective date, you are overwriting history on some infotypes.

NOTE: Ensure that you use the new effective date when you use this function.

- **Display:** View an individual infotype.
- **Overview:** View a list or summary of the infotype's data.

Miscellaneous Tips and Tricks

Case sensitivity

The HR/Payroll system is case sensitive. The standard for the State uses upper and lower case (Title Case). It is important to maintain this format for consistency in reports and searches. This is true for all entries, including Actions and PA30 transactions.

Gather all data before initiating Action

It is a best practice to gather all of the employee's information before initiating an Action—don't start the Action until you can finish it. There may be occasions, like a New Hire, when the information is not available (bank details, tax, etc.). In that case, after you get the approval via Workflow, let the PCR stay in the inbox until the employee arrives before you initiate the Action. If the employee is a no-show, you only have to cancel the PCR since the Action was not initiated. When you do initiate the Action, if the bank and tax information is still not available, you must set the Bank Details (IT0009) to check. See the note in Exercise 3.1 concerning Bank Details. Tax withholding automatically sets to single, zero allowances.

Workflow

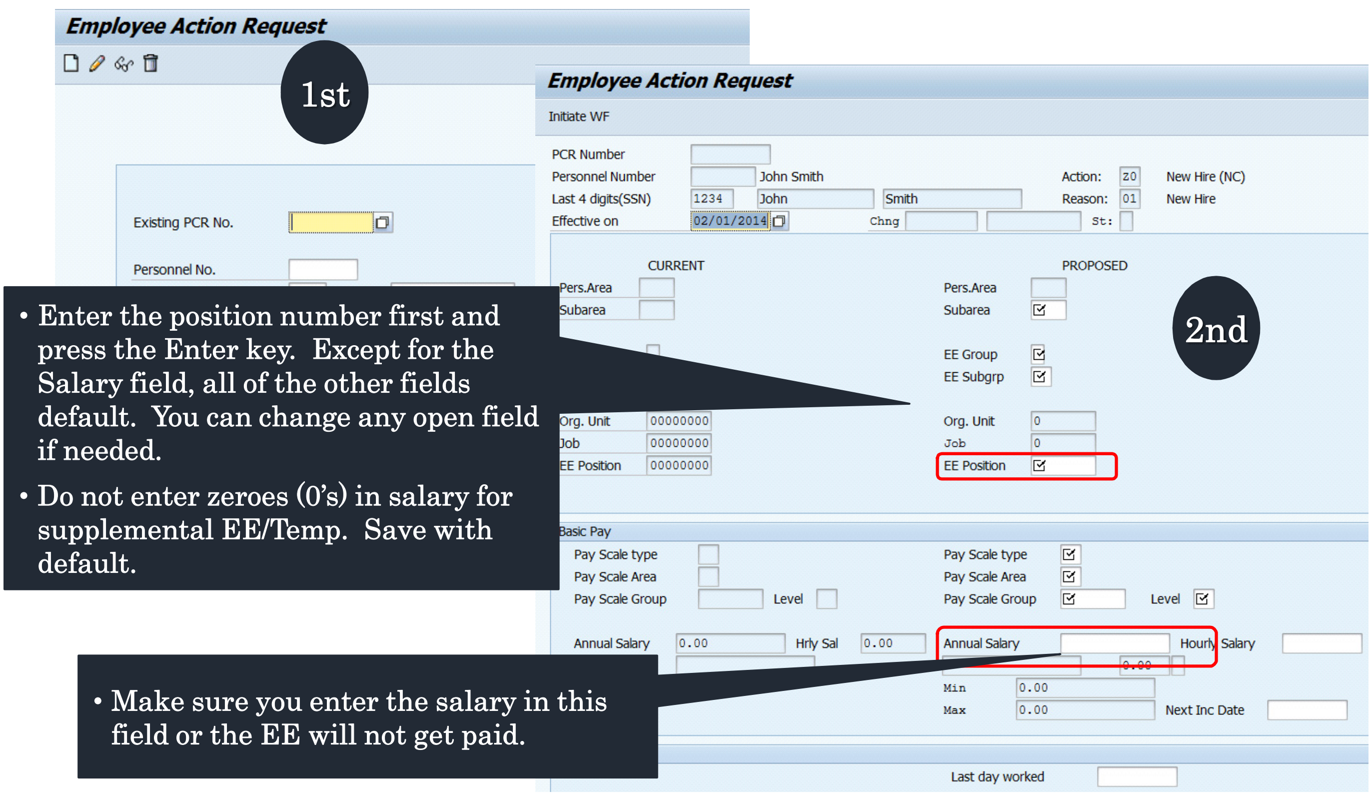
All PA Actions need approval before the Action can be executed. The HR/Payroll system Workflow enables approvals (or rejections) to be obtained electronically. In your Agency, you may already have a manual process in place. Workflow does not eliminate that process entirely, however, it may duplicate a portion of your manual process. You still have to provide the same type of documentation to the Approver that you have always provided -that has not changed. However, in the HR/Payroll system, you can attach documents to the Workflow as well as write notes.

NOTE: Keep in mind that the notes and documents associated with Workflow do not automatically move forward when processing the infotypes of the approved workflow document.

The authority to approve an Action is associated to the Position, and not to the person and person's role. If a person leaves an approver Position, the authority to approve stays with the Position. A person who is subsequently assigned to that Position, also assumes the approval authority (unless the Position is changed by Security).

NOTE: The OSC Security Team is delimiting all roles on a vacant position that require training. The Data Owner will need to submit a Security form to add the appropriate roles when the position is filled.

ZPAA076 - Workflow



Use Transaction code **ZPAA076** to *initiate* the HR/Payroll system electronic approval process, referred to as Workflow (WF).

On the initial *Employee Action Request* screen enter the applicable data. After the Action type and Reason is entered, the second *Employee Action Request* screen is displayed. This screen has two columns. The left column displays the current status of the employee. On the right, enter the new data pertinent to the Action being processed. If the employee is hourly, be sure that the Pay Scale Area field is "hourly". Enter the hourly amount in the hourly field (not the annual salary field).

OSC Training

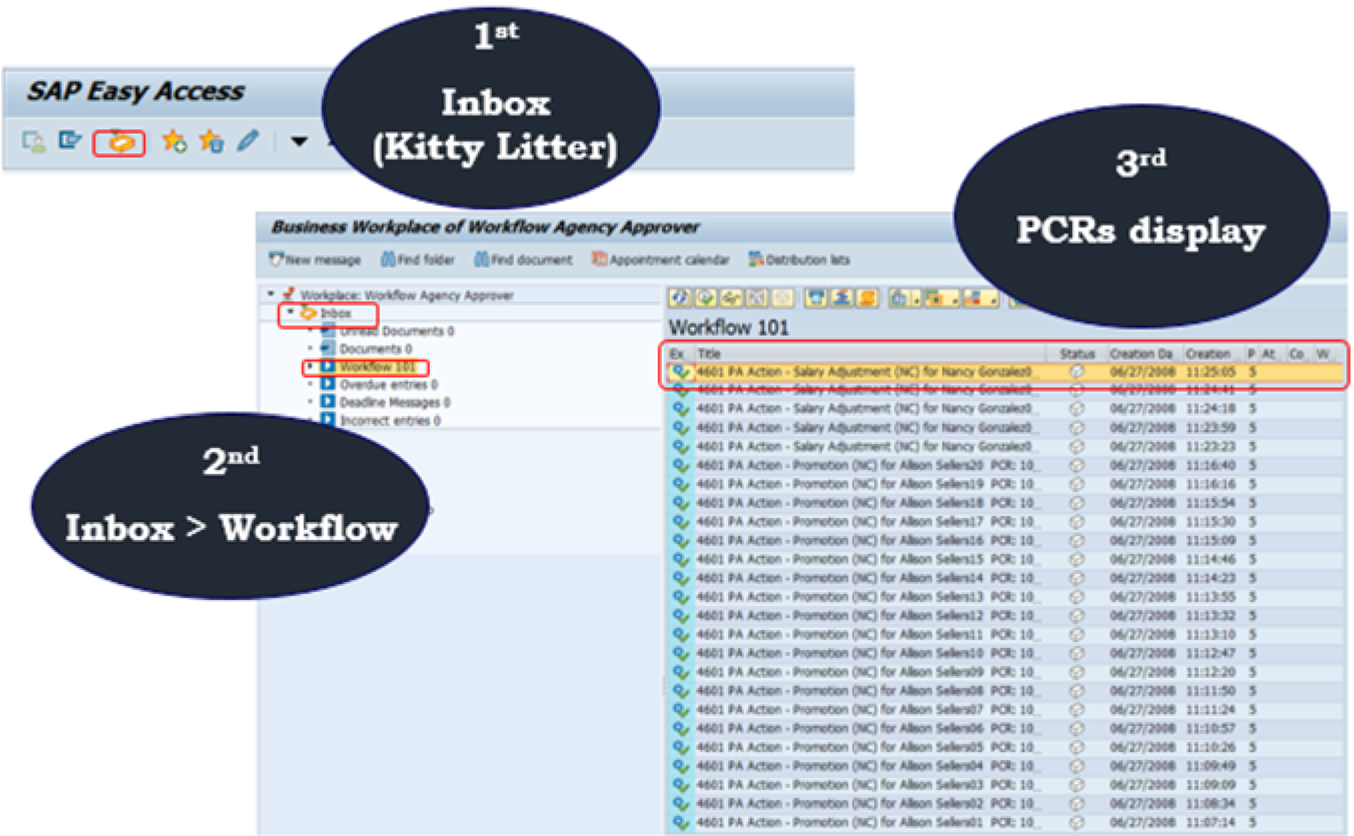
For Work/Against (W/A) actions, the basic pay data should reflect the W/A data and not the assigned position data.

It is critical to review the data entry for accuracy before initiating WF. After WF is initiated, you will not be able to go back in and correct an error. In that case, you have two choices (a) contact the Approver and ask him or her to reject it so that it automatically comes back to you. You make the corrections and send back through the WF process, or, (b) if the WF has already been approved by all approvers and is still in your inbox, you can "reject execution" if the action has not been entered. BEST Shared Services is not part of the PA Actions approval process.

When you initiate Workflow you will receive a Personnel Change Request (PCR) number. Be sure to make a record of the PCR number so that you can track it.

After all the data is entered and WF is initiated, the HR/Payroll system sends the request to the appropriate Approver who can approve or reject the request (there may be more than one level of approval).

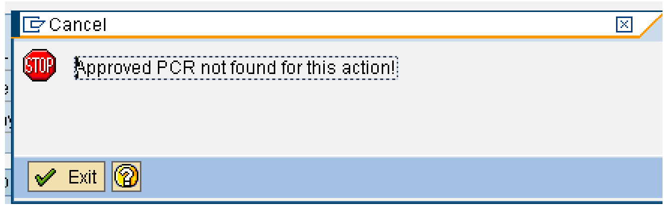
Inbox



The second part of the Workflow is to see if your Workflow item has been approved or rejected. Access the SAP Business Workplace from the Easy Access screen.

From the Business Workplace screen, click *Inbox > Workflow*. All the approved or rejected PCRs that you have initiated are listed on the right. Double-click the approved PCR, and the applicable screen automatically displays for the Action. You are now ready to execute the appropriate Action.

Workflow is always the first step before you initiate an Action. You do not use Workflow for PA30 transactions. If you are ever in doubt whether Workflow is needed, access the Personnel Actions screen using PA40. If the Action is on the list, it must be processed through Workflow. If you attempt to bypass Workflow for an Action, you will receive the error message below and not be allowed to continue.



KNOWLEDGE CHECK

Question		Answer
1.	Each Action has one or more ___ associated with the event.	
2.	Use the ___ function to enter new data into the system	
3.	When you use the ___ function, you should be sure to use a new effective date.	
4.	The HR/Payroll system is case sensitive. You should use the ___ case when entering data.	
5.	When you initiate Workflow on ZPAA076, you receive a ___.	

SUMMARY

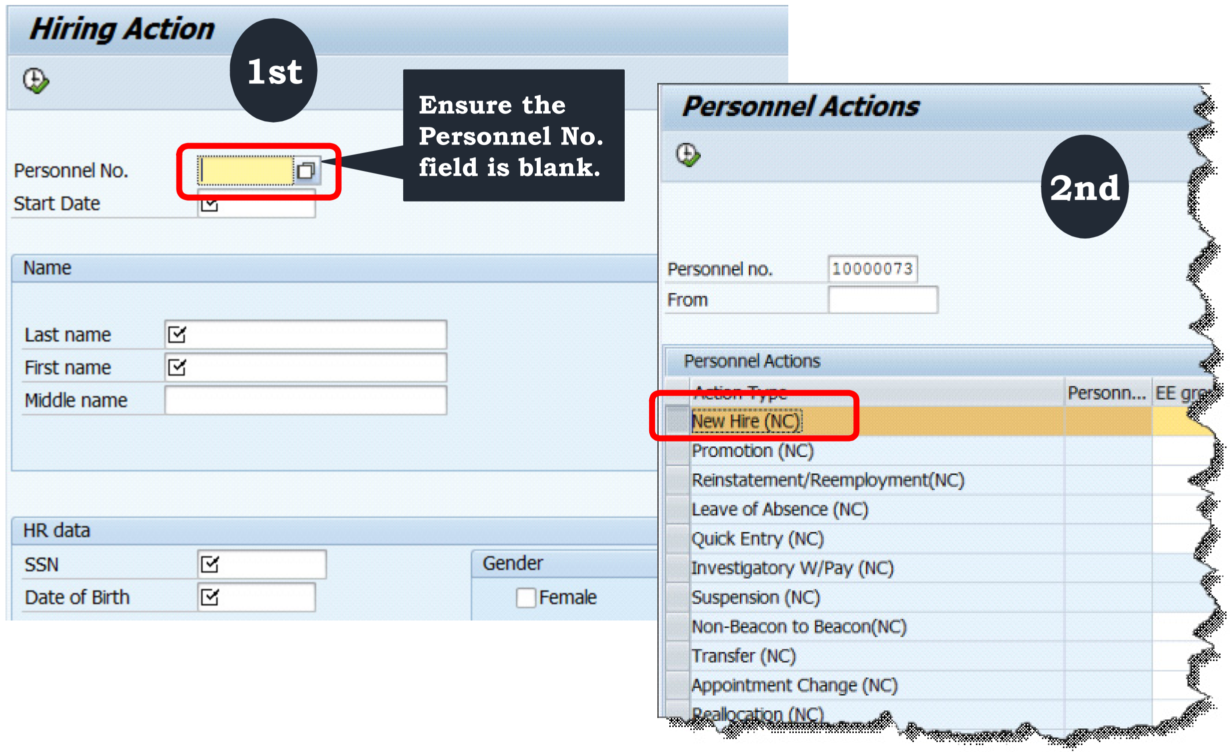
This lesson described the various Actions associated with the life cycle of an employee. It also described how to access the various forms of help available. Several helpful tips and tricks were explained. The workflow process was described.

Entering Employees in the HR/Payroll System

Objectives

- Process Actions using Workflow
- Use the appropriate Action to assign employees to the HR/Payroll system
- Select the applicable reason for each Action
- Distinguish between the hire Actions for new employees

The HR/Payroll System and the Retirement System



When processing a **New Hire**, the *Hiring Action* screen displays when you execute the PCR from your inbox. The employee's basic data (name, gender, SSN, etc.) is entered. The information is sent to the Retirement System, which is external to the HR/Payroll system. The Retirement System assigns an external Personnel Number.

CRITICAL: Ensure that the Personnel No. field is blank. If you have recently processed a New Hire, the Personnel No. field may be pre-populated with that previous number.

After the Personnel Number is assigned, the Personnel Action screen is automatically displayed. You will then select the New Hire action and continue entering the necessary data to complete the transaction.

CAUTION! Never manually assign a personnel number or (although the HR/Payroll system will not prevent you from doing so) or enter a bogus Social Security number. Manually assigning a number causes the employee personnel number to be out of sync with the Retirement System.

NOTE: If the Retirement System is down and you need to initiate a New Hire, contact BEST Shared Services for assistance.

Assigning Employees to the HR/Payroll System

Use the Actions described below to assign an employee to the HR/Payroll system. It is important to understand when to use a specific Action before entering employee data. Follow State policy regarding effective hire date when first day worked follows a beginning payroll period after a weekend or holiday.

Before an employee record is entered into the HR/Payroll system, use the BI Verify Employment report found in the Cross Agency Verification **folder** to search for the employee by last name and last four digits of the Social Security number to ensure that he or she in not already in the system. You should also use the **PPOSE** or **PO13D** transactions to ensure that the Position to which the employee will be assigned is vacant.

New Hire is used to create a personnel record for a newly hired employee who has never been employed by any State agency. This Action includes employees who are temporaries and National Guard.

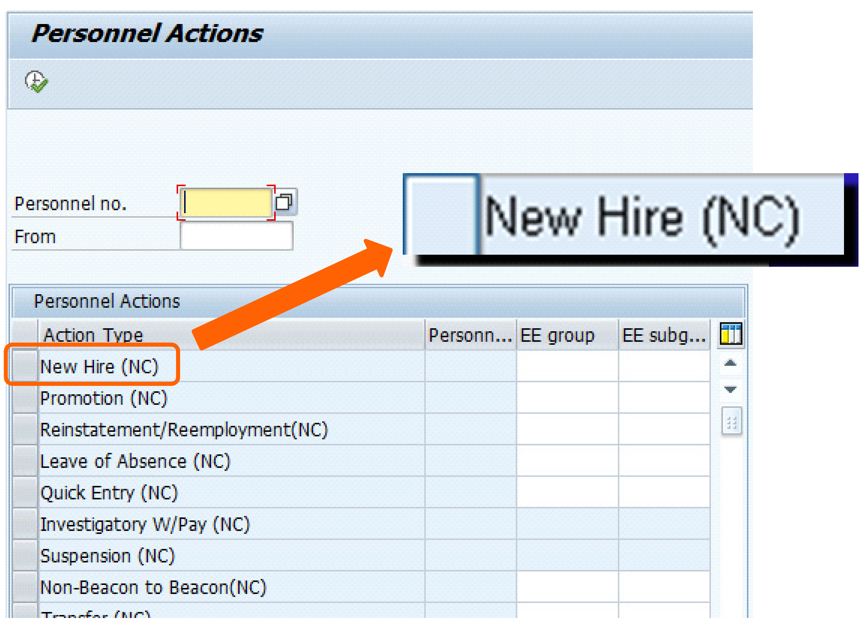
Non-Beacon to Beacon is used for an employee currently working for a Non-BEACON agency or when a State University employee is transferring without a break in service (separation of 31 calendar days) to a BEACON agency. It is also used when an employee previously worked for a Non-BEACON agency or State University and is returning after a break in service to a BEACON agency. (Example - NCSU to DOT)

This action is also used if a former employee left State employment before his or her agency implemented BEACON (the former employee has a record in PMIS, but does not have any record in the OSC HR/Payroll system).

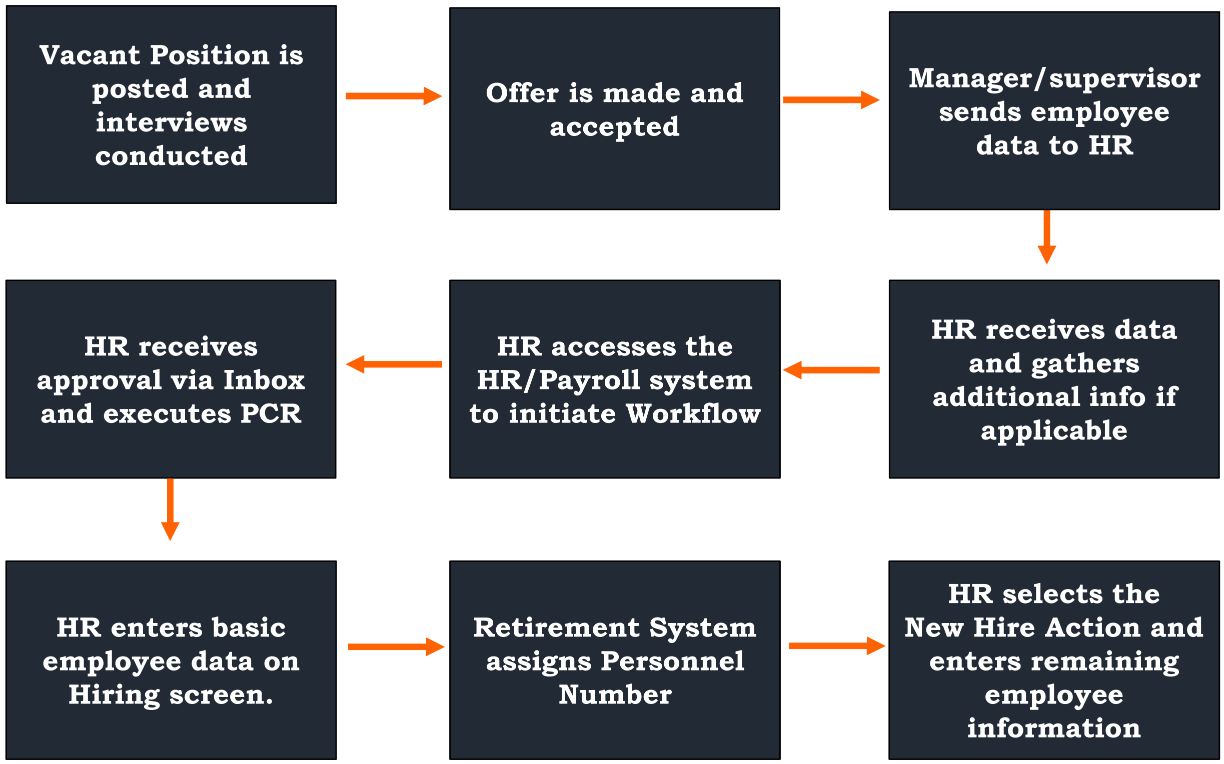
Reinstatement/Reemployment is used to return employees to State employment or return them from some type of leave.

Quick Entry is used to hire contractors, volunteers, board members, and federal employees who need access to the HR/Payroll system but are not paid by the system. This function is performed by the BEST HR team.

New Hire Action



New Hire Process - Employee



As the New Hire diagram illustrates, there are several steps that must take place outside of the HR/Payroll system before a New Hire Action is executed in the HR/Payroll system. The process described is for hiring new employees. The New Hire transaction is not used if an individual is being hired as supplemental staff, such as contractor, federal, or board member. In these cases the Quick Hire Action is used.

Before an individual can be hired, a vacant Position must exist. The vacancy occurs because (1) an existing Position was vacated, or (2) a new Position for an organizational unit was approved and established by the State. Each type of vacancy must be posted in accordance with State policy.

After the vacancy posting time frame has expired, all qualified candidates are interviewed. A qualified candidate is selected and sent a State-approved Offer Package. After the candidate receives and accepts the Offer, the Manager or Supervisor sends the new hire information to HR via manual form, email, phone call, fax, or other distribution method.

HR initiates the Workflow approval process. The initiator of the Action reviews his or her Inbox to see when the final approval is received. After the initiator activates the PCR from the Inbox, the Hiring Action screen is automatically displayed. HR completes basic data on the Hiring screen, and it is automatically sent to the State Retirement System for a Personnel Number assignment. HR chooses the New Hire Action to continue entering the new hire data.

Reasons for the New Hire

- New Hire
- National Guard

* *

EXERCISE: Logging into the HR/Payroll System

SCENARIO
You need to log into the HR/Payroll system to be able to perform the exercises for this class.

Instructions

The instructor will assist you in accessing the system. Follow along as your instructor logs into the HR/Payroll system.

Activities include:

- Signing on with the User ID given to you by your instructor
  - Be sure to click the **Open** button when the Portal pop-up box displays.
- Adding the following transactions to your Favorites folder:
  - ZPAA076
  - PA30
  - ZPA0189
- Change the technical settings display
  - Extras > Settings > Display technical names
- Adding the following URL to your Favorites folder:
  - http://www.osc.nc.gov/training/osctd/help/

* *

EE Group/Subgroup

The HR/Payroll system defaults the Employee Group of all new hires as a **permanent** employee. When you are entering new hire data, you <u>must</u> change the Employee Sub-group on Workflow as applicable if you are entering a probationary, or time limited employee.

Bank details

The completion of the Bank Details infotype (IT0009) <u>must</u> be entered in order for payroll to run on the new employee. If the bank details are not available at the time of the data entry, set up a paper check. It is your responsibility to obtain that information and update the infotype before the system is closed for payroll processing. Even if you have instructed the employee to enter the data in ESS, you still must follow up with the employee to ensure he or she makes the entry prior to payroll closing.

🗁 **IMPORTANT:** Only change an Employee’s bank details if you have documentation to do so from the employee, such as a direct deposit form signed by the employee which would include a bank deposit slip or voided check. You need to keep this documentation after you make the change.

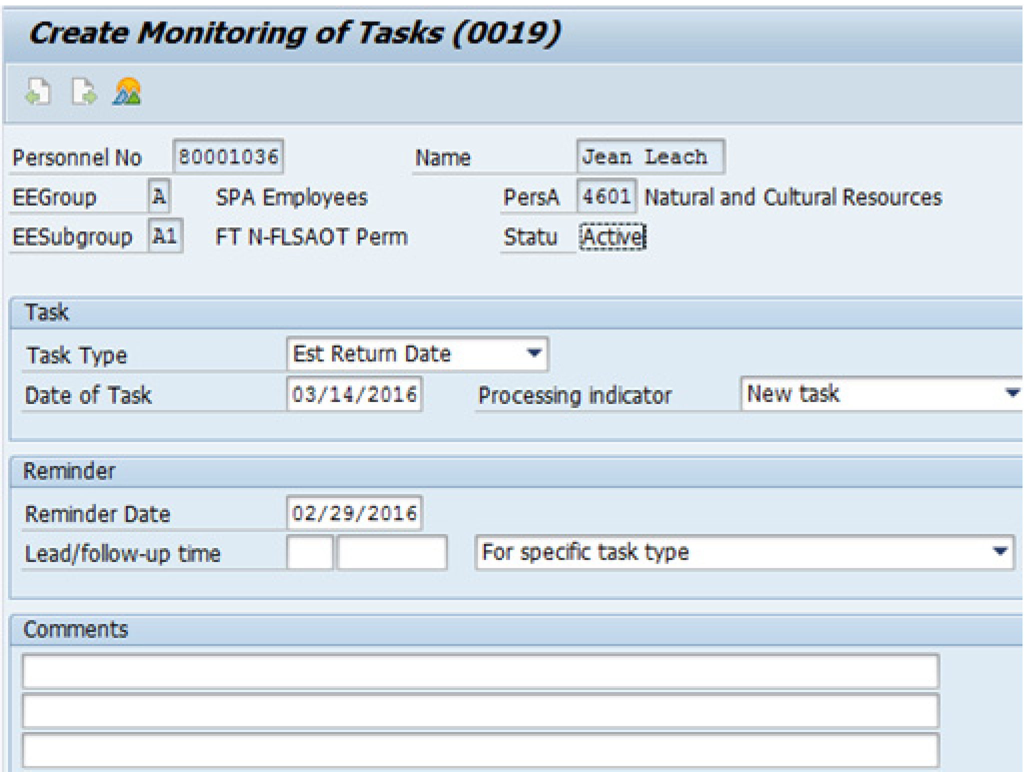
Save versus Next Record

Even if you make no changes to an infotype, you should still **Save**. The infotype may be connected to dynamic infotypes which will not display if you have not saved.

The only time you would use the **Next record** button is when you do not need to enter data in the infotype. For example, if you do not need to enter data on the Monitoring of Tasks (IT0019) infotype, you would use the Next record button. If you used Save instead of Next record, you would receive an error message and not be able to move forward. The general rule is: **Save** infotypes that are pre-populated, even if you do not make any changes. If the infotype is blank and you are not entering data in any of the blank required fields, use **Next Record**.

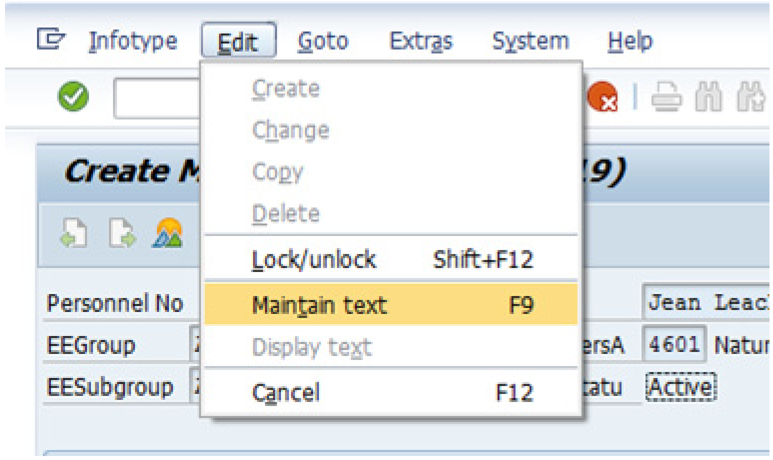
Monitoring of Tasks (IT0019)

This infotype is like a tickler file and is date-driven. You enter a due date and then run the Date Monitoring report (S_PH0_48000450 in SAP or B0099 in BI) to view the various tasks due for a week. If the task is completed prior to the due date, it will still display on the reports unless you delimit the Monitoring of Tasks infotype.



You can enter comments in the Comments section at the bottom of the screen, however this particular section does not allow for word-wrapping. You must keep track of how many characters you have entered on each line. Also the Comments section only allows entry on three lines. If you wish to enter without word-wrap issues or you need more than three lines of text, use the preferred access method below from the Edit > Maintain text menu path on an infotype screen.

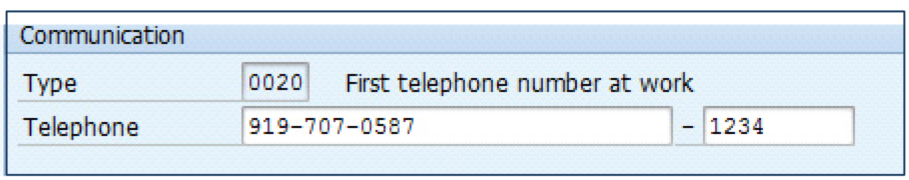
Comments



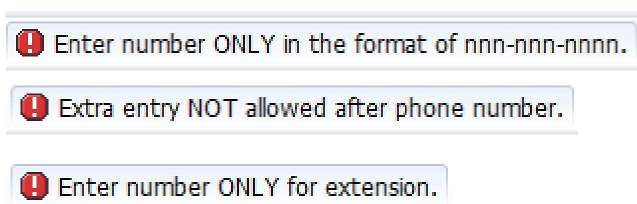
The Comments function is useful as you are entering data (via an Action or a PA30). You can enter comments on many infotypes by selecting *Edit > Maintain text* from the menu (if grayed out, adding comments is not available for that infotype). A new window displays where you can enter comments. The standard for comments is to preface your remarks by the date and your name. Keep in mind the remarks must be professional. You cannot report from the comments. It is a best practice to make sure that you document all PA Actions or infotype revisions by entering comments.

First Telephone Number at Work (IT0105)

The system now accepts only one format for the telephone number in the Communication type First telephone number at work. Only use dashes (not slashes). If a number is entered in an unacceptable format, the system will respond with an error message:



If the number is not entered in the correct format, the following messages will display:



Examples of correct and incorrect formats:

Correct	Incorrect
919-707-0707	(919) 707-0707
	919/707-0707
	919=707-0707
	1-919-707-0707
	919.707.0707
	9197070707

* *

EXERCISE 3.1: New Hire Action

SCENARIO

The Cultural Resources Library is undergoing a digitization process and will hire a new Digitization Clerk into its organizational unit (20010287).

- The new employee will begin working today at a salary that is equivalent to the minimum salary range.
- The new employee will be issued a badge and two keys.
- The employee's military status is Reserve.

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the *New Hire Action* BPP to complete the exercise.

There are three parts to this Exercise:

I. Initiate Workflow (WF)

II. Watch as Instructor demonstrates the Agency and Funding approval process

III. Complete Approved PCR from the Initiator's Inbox

It is important to complete all of the exercises in their entirety because some subsequent exercises depend upon the data that was entered in previous exercises.

The online Business Process Procedure (BPP) is the step-by-step process. There are steps included in the first couple of exercises; after that, you are instructed to use what you have learned up to that point to perform the subsequent exercises.

PART I - Initiate Workflow (WF) as Initiator

1. Assume the following: you have already run the Cross Verification Report and were not able to locate the employee in the system. You used PPOSE and verified that the position is vacant.

2. On the Easy Access screen, type **ZPAA076** in the Command field.

3. Click **Enter** . The Employee Action Request screen is displayed.

4. Enter the following data:

Field	Value
Last 4 digits (SSN)	Any of your choosing (make up a nine-digit social security number for training purposes). **Important!** Write down the nine numbers you used on your Transaction Log because you will need them again. At this point, enter the last 4 digits as applicable in the Last 4 digits (SSN) field. **FOR TRAINING EXERCISES ONLY!** If you receive a message that the security number is already assigned to another employee, just continue entering a combination of numbers until it is accepted.
Employee Name	Any of your choosing - Be sure you write down the name you use on your Transaction Log because you will need this person in subsequent exercises.
Effective on	**Today's date** (in your work environment, follow State policy if the employee reports to work one day after the beginning of a payroll period that falls on a weekend or holiday). Be sure to write this on your Transaction Log.
Action Type	New Hire
Reason	New Hire

5. Click the **Enter** button.

6. Click the **Create** button. The second screen of the Employee Action Request screen is displayed.

7. From the table below, select the Position number assigned to you by your instructor and enter it into the **EE Position** field.

	POSITION #: *Digitization Clerk*						
A	65002017	F	65002022	K	65002027	P	65002032
B	65002018	G	65002023	L	65002028	Q	65002033
C	65002019	H	65002024	M	65002029	R	65002034
D	65002020	I	65002025	N	65002030	Inst 1	65002035
E	65002021	J	65002026	O	65002031	Inst 2	65002036

HINT: Press the **Tab** key. (Use the Tab key rather than the Enter key so that hard stops will function as needed.)

Be sure to write the position you used on your Transaction Log.

8. Click **Enter** .

Observe that the Employee Group and Employee Subgroup fields are now populated.

9. Enter the following data:

Field	Value
EE Group/Subgroup	Change to the appropriate subgroup to indicate that the employee is **full time, subject to overtime**, and is a probationary employee (use the matchcode and then double-click the correct selection). • SPA Employees • FT S-FLSAOT Prob. (B2) **NOTE:** When the Position number is entered, the Employee Subgroup defaults to FT S-FLSAOT Perm. Because this is a New Hire, the employee should be in probationary status.
Annual Salary	Enter the **minimum** of the salary range. **NOTE:** Do not enter data in the Hourly Salary field for a permanent employee. This is for Temporary employees only.
Pay Scale Grade Level	GR

NOTE: Observe the Last Date Worked field will not be used now, but would be used in appropriate Actions.

TIPS & TRICKS: Employee Group and Subgroup Changes on a Position

When a position has been revised by OM to change the employee group and subgroup, that change does not feed to PA until a new PA Action is created. To change the Employee Group and Subgroup of an employee, it is necessary to do an Appointment Change Action.

10. Click the **Enter** button.

11. Click the **Save** button. The Information pop-up is displayed with the assigned PCR number.

12. Write the system-issued **PCR** number on your Transaction Log. (Back at work you would write it on your new hire paperwork).

13. Click to close the pop-up.

14. Click the **Services for Object** button.

NOTE: This button is not available until you have saved the Employee Action Request. The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon.

15. Select **Create > Create Note.**

16. Enter a **note title**.

17. Click in the note section and type applicable information to send along with the PCR. For training only, use the pre-written notes on your PC desktop. Listen as your instructor explains how to access the PA notes file from your computer's desktop.

NOTE: The notes that you write are only recorded in the Workflow PCR; they do not follow in the PA Action. However, you can copy and paste from WF into the Action when you are processing the infotypes.

18. Click the **green check** to close the notes. If applicable, close the notes icon menu.

19. Click **Enter** .

20. Click **Save** .

21. Click the Initiate WF button. The Information pop-up is displayed indicating that the PCR has been submitted.

22. Click the **green check** button to close the Information pop-up. You are returned to the Employee Action Request (first screen).

PART II - Watch as the Instructor demonstrates the two approval levels (Agency and Funding)

PART III - Complete approved PCR from Initiator's Inbox

NOTE: If you are on the Employee Action Request screen, use the Back button to return to the Easy Access Screen.

23. From the Easy Access screen, click the **SAP Business Workplace** button.

24. Click the **node** beside Inbox Inbox to expand it.

25. Before you process the PCR, make a copy of the note in order to paste it into the Actions infotype:
    - Select (do not double-click) the Workflow PCR to select it.
    - At the bottom of the screen, single-click the **header** (not tracker) link: PA PCR xxxxx ##### (where X and # represent employee's name and PCR number).

- At the Employee Action Request screen, click the **Services for Object** button to review the notes or attachments.
- Select **Attachment List**.
- Highlight the **line item** for the note.
- Double-click or use the eyeglasses.
- Highlight the entire note, including the title.
- Right-click and select **Copy**. You can either keep the copied note in the clipboard for use later, or paste it to a Word document for later use.

Do not leave the PCR open in a second session.

- Click the **red X** to close the Display note pop-up.
- Click the **red X** to close the Services for Objects pop-up. It is a best practice to make sure the PCR is closed before you process the approved PCR Actions because an open PCR uses a lot of memory.
- Click the **Back** button.

26. With the PCR still selected, click the **Execute** (or double-click the PCR line item). The system automatically takes you to the applicable screen for the Action (in this exercise, it is the Hiring Action screen).

27. On the Hiring Action screen, enter the following data:

Field	Value
SSN	On the Hiring Action screen, you must enter the complete nine-digit social security number you recorded earlier on your Transaction Log. In Workflow (ZPAA076), you only entered the last 4 digits. **CAUTION!** Be sure the last 4 digits are the same as the ones you previously entered on the Employee Action Request screen. **For Training only:** If you receive a message that the security number is already assigned to another employee, just continue entering a combination of numbers (except the last 4 digits) until it is accepted.
DOB	**11/15/1980** (Be sure to use all eight [8] digits).
Gender	Use a gender that matches the name you chose.

28. Click the **Enter** button and then the **Execute** button. The Personnel Actions screen is displayed with an assigned personnel number.

29. Write the new Personnel number (PERNR) on your Transaction Log.

30. On the Personnel Actions screen, enter:

Field	Value
From	**Today's date** (this must always match the date you entered on the Employee Action Request screen). Remember to use all 8 digits when entering the date.
Action Type	**New Hire**

31. Click the **Enter** button.

32. Click the **Execute** button.

NOTE: It is a best practice to always save a pre-populated infotype even if you do not make changes. In some cases, there are dynamic infotypes that display only when the previous infotype was saved. If you use the **Next** record button instead of saving, those dynamic infotypes will not display and the employee's record will be incomplete.

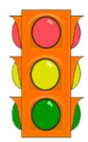
33. Complete the following fields:

Field	Value
Create Actions (IT0000)	
Enter note copied from the Employee Action Request screen	From the menu bar: • Select **Edit** • Select **Maintain text**. • Click the **Enter** button if a warning message displays indicating that person and position have different group/subgroup • Click the **Enter** button. • Use **Ctrl+V** (or right-click and select Insert) to paste the note from the PCR. • Click the **Enter** button. • Click the **Save** button. • Click **Save** as needed to bypass warning messages again.
Reason for Action	Observe the field defaulted from the Employee Action Request screen.
Reference Per. No	Leave blank
Position	Observe the field defaulted from the Employee Action Request screen.

EE Group/Subgroup	Observe the field defaulted from the Employee Action Request screen. If you forgot to make the applicable changes on the Workflow PCR, you can make the changes now. Be aware, however, that when an audit is run of your Actions, this will show as a discrepancy. Click the **Enter** button. Click the **Save** button. A warning message displays indicating that the employee and position have different groups/subgroups. Click the **Enter** button to bypass the warning.
Create Personal Data (IT0002)	**Critical!** – Do not change the Name Format field default. This field should **ALWAYS** be “00”. **NOTE:** It is important to SAVE this infotype.
Marital status	**Single**
Gender	A gender that matches the name you chose
Dependents	Leave blank (this field is not used during the New Hire Action.) Click **Enter** and **Save** .
Create Organizational Assignment (IT0001)	Click **Enter** and **Save** .
Delimit vacancy	**Yes**
Create Date Specifications (IT0041)	Review for accuracy. Click **Enter** and **Save** .
Create Addresses (IT0006)	
Permanent address	**4 Paws Ln** **Raleigh** **Wake County** **NC 27604** INSTR: Mention limited number of characters **NOTE:** Enter address information on Address line 1. Only use Address line 2 if all of the information doesn’t fit on line 1.
Telephone	**919-244-8754**

Tax screens (IT0207, IT0208, IT0209)	These all default from the previous information you entered. Review for accuracy. **NOTE**: On IT0208, the *Predominant Tax Area* field is only used for employees who work in and are taxed by multiple locations within the state of Pennsylvania. This field will default to "No" and <u>should not be altered</u>. Click **Enter** and **Save** .
Create Withholding Info W4/W5 US (Required) (IT0210)	**NOTE**: The initial set-up is done by HR. Changes can be made by the employee via ESS. If updated after the first day of the month, the changes take effect the following pay period. If the employee is exempt from taxes, you will select the exempt option and choose "reportable" from the list. If the employee wants an additional amount withheld, enter the dollar amount in the "add. Withholding" field.
Federal Filing Status	**Single (01)**
Allowances	**1** Click **Enter** and **Save** .
Create Withholding Info W4/W5 US – State Filing Status (IT0211)	See the note above on Federal W4 regarding the other information about this infotype. **Single (01)**
State Allowances	**1** Click **Enter** and **Save**.
Create Addresses (IT0006)	**NOTE**: Enter address information on Address line 1. Only use Address line 2 if all of the information doesn't fit on line 1.
Emergency	**Havya Bach** **65 Red Cross Rd** **Raleigh NC 27604** Telephone: **919-898-4545** Click **Enter** and **Save** .
Mailing address	**PO Box 5104** **Raleigh NC 27604** Click **Enter** and **Save** .

Create Monitoring of Tasks (IT0019)	You are using the Monitoring of Tasks infotype to remind you of a task that you need to follow up on concerning the employee (like a tickler file).
Task Type	For this exercise, use **End of Probation**. In your work environment, you would make the selection based upon the task for which you want to be reminded.
Date of task	**Enter 12 months (1 year) from date of hire** (date of hire is today's date). In your work environment, you would enter a date applicable to your Agency process. Click **Enter** .
Reminder date	This field has been designed to automatically populate. You can change the date if a different date better meets your needs. **Add comments**. *EE probation ends on <date>.* Click **Enter** .
Processing indicator	Defaults to "New Task." Do not change. Click **Save** .
Create I-9 Status (IT0094)	
Residence status	Click the drop-down and select Citizen. Be aware that if an employee is not a citizen, you would make a different choice in the drop-down, and a second infotype (IT0048 Residence Status) would display. See the Student Guide for details concerning how to process IT0048. **NOTE**: The OSC HR/Payroll system entry for non-Citizen employees does not replace Windstar—you must still enter non-Citizen employees into the Windstar system, the official system of record for non-citizen employees.
ID Type	Click the drop-down and select **U. S. Passport**. **NOTE**: There are other options in the Employment verification section like birth certificate, social security number, etc.
Issuing Authority	**US Dept of State**
ID#	**12345678**
Dates	Issues **10/1/2006**, expires **10/1/2016** Click **Enter** and **Save** .

Create Communication (IT0105) NOTE: This is the telephone number used in the NC Gov employee directory.	**919-259-4574**. This infotype is for the entry of the employee's office telephone. **NOTE**: Remember to use the correct format when entering the telephone number. Click **Enter** and **Save** . You may receive a warning that the ID number is already in use. Click **Enter** to bypass the warning.
Create Planned Working Time (IT0007)	It is critical that you review this infotype. The planned working time defaults based from the employee's organizational structure. **It is especially important to check the part-time box when applicable.** For this exercise, **accept the default**. Observe that when you click Enter, the hour field automatically populates. The weekly workday field does not default. Do not enter data in the weekly workday field. Click **Enter** and **Save** . **NOTE**: Be sure the Annual Work hours equal 2080. Be sure the Employee Percent is 100%.
Create Basic Pay (IT0008) You should use **Edit > Maintain text** to write a note when applicable	 Reason: **New Hire** --- STOP!!! **NOTE**: Observe that the salary defaulted from WF. Observe also that the value is USD which has automatically populated. If the employee was assigned to a DOT position, the HR/Payroll system would automatically change the field to USDN. All permanent DOT positions require 5 decimals on the Basic Pay infotype (0008). If the DOT employee is a temporary employee, the field will remain as USD because 5 decimals are not required for DOT temporary employees. Click **Enter** and **Save** .
Possible subsequent activities	• Click the **green check** to get to the enrollment screen. • Double-click the **Automatic offer** option in order for TSERS to display. • Click the **Enroll** button. • Click **Enroll** again. • Click **Continue**. • Click the **Back** button (top of screen). • Click the **red X** to return to the data entry screen.

Create Bank Details (Required) (IT0009) You should always use **Edit > Maintain text** to write an applicable note when needed	The completion of the Bank Details infotype (IT0009) must be entered in order for payroll to run on the new employee. If the bank details are not available at the time of the data entry, set up a paper check. It is your responsibility to obtain that information and enter the infotype before the system is closed for payroll processing. Even if you have instructed the employee to enter the data in ESS, you still must follow up with the employee to ensure he or she makes the entry prior to payroll closing. You must obtain high level approval before you can change the field from “direct deposit” to “check”. 🗁 **IMPORTANT:** Only change an Employee’s bank details if you have documentation to do so from the employee, such as a direct deposit form signed by the employee which would include a bank deposit slip or voided check. You need to keep this documentation after you make the change.
Bank routing (key)	**041203824**
Bank account number	**5487542**
Bank Control key	**01** (01 is checking; 02 is savings) Click **Enter** and **Save** .
Create Additional Personal Data (IT0077)	
Ethnic Origin	Use your own
Military status	**Drilling Reservist**
Veteran status	**Non-veteran** 🗁 **NOTE**: If “Recently Separated Veteran” is chosen, a new date box displays. You will need to enter the employee’s discharge date.
Disability status	**None/prefer not to report** Click **Enter** and **Save** .
Subtypes for “Quota Corrections” pop-up	**Military Leave (Training)** 🗁 **NOTE:** When an employee is no longer eligible for the military quota, you must copy IT0077 and change the Veteran status. You will then create an IT2012 (subtype ZMLE) to stop the automatic accruals that take place in October of each year. Refer to the Time Job Aid: *Delimiting Military Training Leave*

Create Quota Corrections (IT2013)	Quota number: ___ **hours** (prorated…follow your instructor's directions at this point) Do not change time transfer. Click **Enter** and **Save** .
Subtype for Infotype "Education"	Select **06** for Bachelor (BAC) Degree Click the **green check**.
Create Education (IT0022)	
Start and to	**9/01/1998 - 5/30/2002**
College attended	**NC State University** **NOTE**: Be sure you are consistent in the way you enter the college name. For example, you would not enter NC State on one employee and enter North Carolina State on another employee. Consistency assists when you are running reports.
Verified	Use the drop-down menu and select the option that indicates that **verification is pending**. **NOTE**: Per OSHR policy, Education Verification must be completed withing 90 days of hire. **Enter** and **Save**.
Monitoring of Tasks (IT0019)	This time, the Monitoring of Tasks (IT0019) gives you an opportunity to follow up on the verification of the education. Monitoring of Tasks displays on your manager's self service. To view a list of your tasks, you must run the Date Monitoring Report (transaction S_PH0_48000450).
Task type	**Credential Verification**
Date of task	Enter **60 days from today.** In your work environment, you would enter a date applicable to your Agency process. Click **Enter**.
Processing Indicator	Defaults to **New Task**. Do not change.
Reminder date	This field has been designed to automatically populate. You can change the date if a different date better meets your needs. If education is verified prior to the reminder date, the task is not automatically deleted; it will still display on the report and on MSS. You can delimit the infotype on the day you verify the education which will keep it from displaying on the report. **Enter** and **Save**

Subtypes for infotype Certification and Licensing	Click **X** to remove pop-up window. This infotype is used when the position requires a specific certificate or license.
Create Objects on loan (IT0040)	State ID **#45**. **1/pieces** NOTE: On the initial hire, you are to only enter one item on loan. If the employee receives more than one item--like in this case key # B05 and key #A12-- you will use PA30 to add the additional items; however you will perform that part of the exercise in this class). **Enter** and **Save**

34. Click the **Back** button at the Personnel Actions screen (the system automatically returns you to Personnel Actions when you finish the last infotype within the Action.

35. The pop-up is displayed indicating that the item must be explicitly completed. Click **Complete Work Item** Complete Work Item .

NOTE: It is critical that you complete this last step. Also be aware that if you canceled the PCR without finishing the Action (which put the PCR back into your Inbox), when you click the Complete Work Item button, you will receive another screen where you have to indicate again that you have finished the Personnel Action.

36. Click PA Action Completed at the Decision Step in Workflow screen (middle option).

37. Click the **Back** button to return to the Easy Access screen.

> **TIPS & TRICKS: Multiple infotypes for a specific item**
>
> In most cases, each infotype is presented only one time in an Action. When an employee needs more than one infotype (bank details, objects-on-loan, certifications etc.), enter the applicable data during the Action and use transaction code PA30 to enter the additional data.

38. On the Easy Access screen, type **PA30** in the Command field and click **Enter**. .

39. Type **0040** in the Infotype field and press **Enter**.

40. Click **Create** .

41. Select the code for **Office Keys** from the matchcode in the Object on loan field.

42. Enter **2 / pieces** in the Number/unit field.

43. Click **Enter** and **Save**. The system again displays the PA30 screen.

44. Click the **Overview** button to view a list of the Objects on Loan you created.

> **TIPS & TRICKS: Manually Adding Performance Infotype**
>
> If you are processing a new hire between mid-April and June 30 every year, you will have to manually add the Performance Rating Infotype on all new hires (see Performance Rating IT0024 BPP for details). You will not perform this part of the exercise in class. You are only authorized to perform this function if you have the Performance Maintainer security role.

This exercise is complete.

* *

Additional Resources
You can find several additional support materials about the New Hire Action on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/ Follow this path to access the latest version of the New Hire BPPs and Job Aids: *Personnel Administration > BPPs* • New Hire Action *Personnel Administration > Job Aids* • New Hire Action Guide • PA Actions Reasons Definitions

Additional Personal Data (IT0077)

Effective 12/7/14, SAP has added additional fields to the Veteran Status data box due to an update from the US Department of Labor. Options now include:

- Special Disabled Veteran
- Vietnam Era Veteran
- Other Protected Veteran
- Recently Separated Veteran
- Armed Forces Service Medal Veteran
- Disabled Veteran
- Not a Protected Veteran
- Prefers Not to Answer
- Non-Veteran

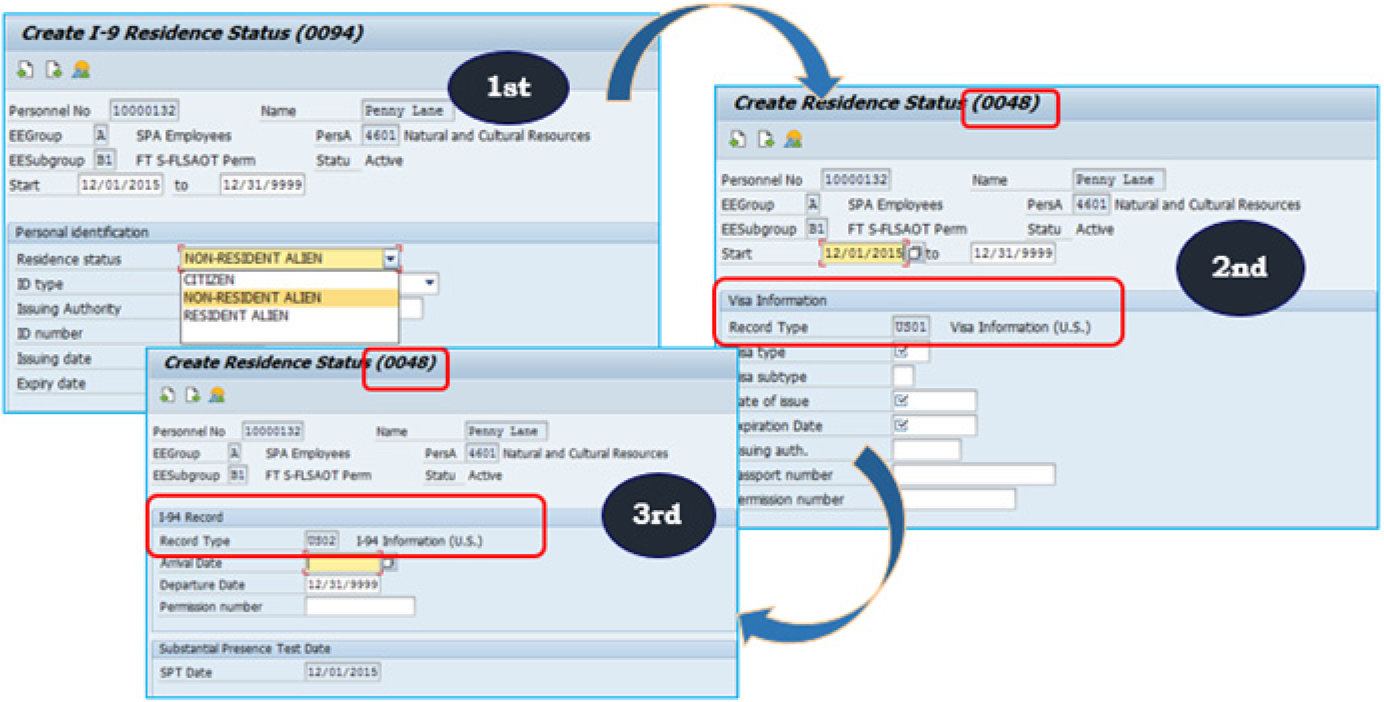
For more detailed information regarding the purpose and use of IT0077 - Additional Personal Data, access the new job aid, *Military and Veteran Status*, located on the Training HELP website.

ACA - PCR Changes - Temp Actions

Qualified Temporary employees are now eligible for Benefits. This will affect how the employee is hired into BEACON. See the BEST Conference Call Webinar on 10-21-14 for more detailed information about the Temp Hire action.

Training HELP > Conference Calls/Webinars/Workshops > BEST Conference Call Webinars > October 21, 2014

I-9 Residence Status (IT0094)



Based on the selection you make in the **Residence Status** field on the *I-9 Residence Status (0094)* infotype, additional infotypes will display (as a reminder, you chose Citizen in both New Hire exercises). Remember also that you must still enter non-citizen employees into Windstar (the official record keeping system for the State).

Non-Resident Alien

When you select Non-Resident Alien on IT0094, there are two *Create Residence Status (0048)* infotypes that display (see illustration above) in the following order:

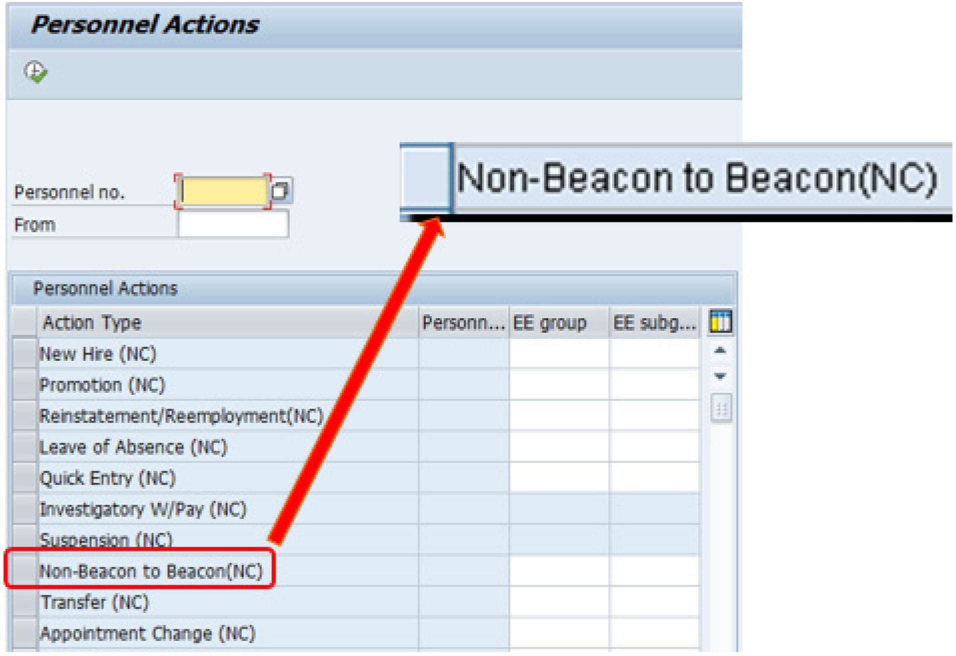
- Record type: US01 – Visa Information (U.S.)
- Record type: US02 – I-94 Information (U.S.)

You determine which IT0048 you need to use: US01 or US02. If you do not need US01, use the **Next Record** button to page forward to US02.

Resident Alien

When you select Resident Alien on IT0094, only one *Create Residence Status (0048)* infotype is displayed. In the **Residence status** field, select the applicable type from the list. There are 57 options in the drop-down list, including both US01- Aliens Visa Information and US02 - I-94 Information.

Non-Beacon to Beacon (NC) Action



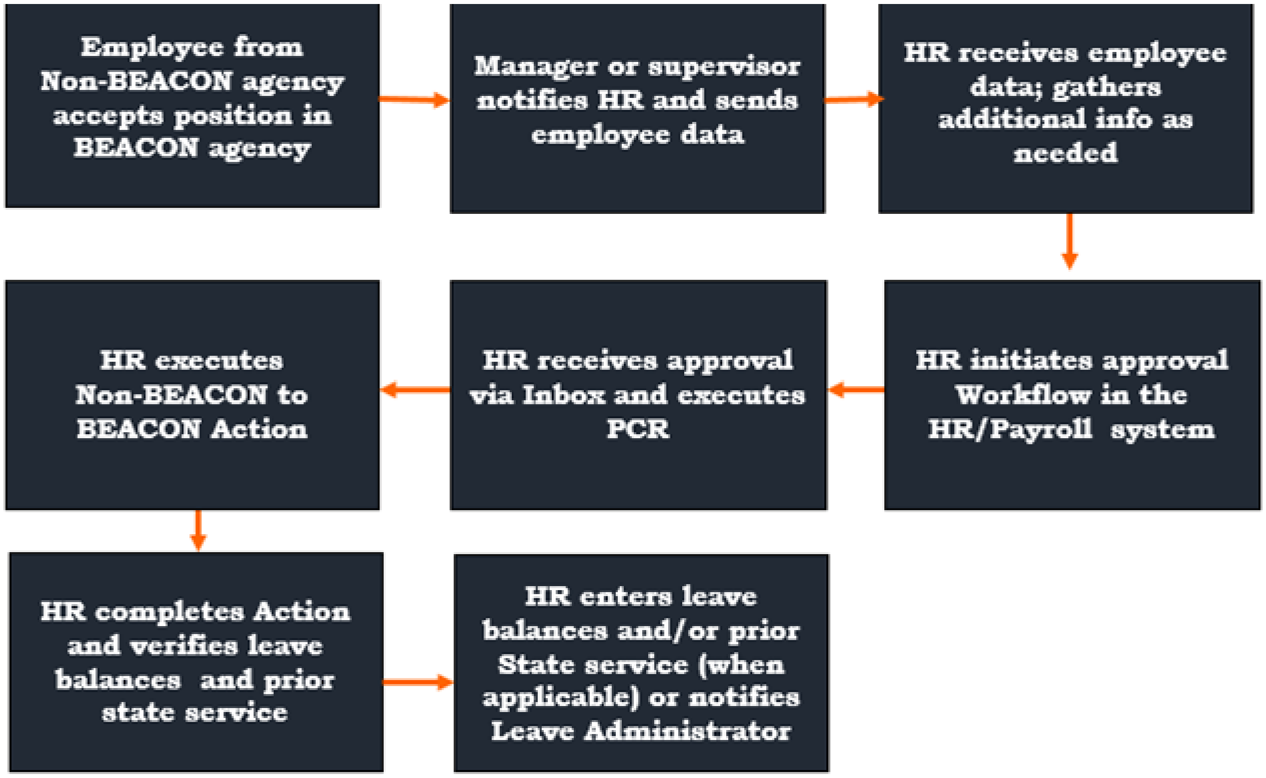
The Non-Beacon to Beacon Action is used when:

- The employee may be returning to the same agency as the one he or she left (as well as to the same position), or may be going to a new agency and position.
- A University or General Assembly employee is leaving the University/General Assembly system and accepting a position with a state agency.

Reasons associated with the Non-Beacon to Beacon Action	
• Transfer Lateral • Transfer Reassignment • Transfer Promotion • Return to St w/in 12 mths same S/G • Return to St w/in 12 mths higher S/G • Return to St w/in 12 mths lower S/G	• Return to State w/in 5 yrs • Return to State after 5 yrs • Grade-Band Transfer (see NOTE below) • Class/Pay Plan Change • EPA-SPA

NOTE: If you use the Grade-Band transfer reason, on Workflow enter Pay Scale type, Pay Scale Area and Pay Scale Group before you press Enter; otherwise, you will get an error message. Of course, you can merely press Enter to bypass the error message and then enter the fields as well.

Non-Beacon to Beacon Process



As you enter the information for the employee, you will observe that the same infotypes display for the Non-Beacon to Beacon action as display for a new hire. This is logical since there is no employee record in the agency's HR/Payroll system—all of the employee's information is in his or her agency's current non- HR/Payroll system. Therefore, you are creating a completely new HR file in the HR/Payroll system, including all of the applicable infotypes, (which includes enrolling the employee into the applicable Retirement System).

You should make sure that you obtain any active leave balances and/or prior State service on the employee. You will verify the balances and the creditable service from the previous agency. If you have a dual role as both the HR Master Data Maintainer and the Leave Administrator, you will use PA30 to create infotype 2013 - Quota corrections for each transferring leave balance (this infotype is not presented during the Non-Beacon to Beacon Action) and *IT0552 – Display Time Specification/ Employment Period*.

🗁 **NOTE**: IT0552 has been enhanced with a link to the OSHR document for creditable service conditions. The star in front of the employer lets the user know they should reference the document.

If your role only consists of being the HR Master Data Maintainer, you must contact the Leave Administrator to ensure that the employee's leave balances are brought up to date.

🗁 **Important!** When an employee (or Non-Beacon to Beacon) received a pro-rated longevity, you need to create a IT02012 / Z033 to document the pro-rated longevity already received so employee doesn't get a full payment when the year is complete.

Additional Resource
You can find several additional support materials about the Non-Beacon to Beacon Action on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/ Follow this path to access the latest version of the following job aid: *Personnel Administration > Job Aids* • Longevity Job Aid

* *

EXERCISE 3.2: Non-Beacon to Beacon Action - Lateral

SCENARIO
Anita __________, an Office Assistant IV at UNC-CH, has accepted an Office Assistant IV position at the Cultural Resources Archives and History office. • Her current salary is the minimum of the salary range (the same salary she was receiving in her previous position). • She is a permanent, subject to FLSA OT employee. • She had 110 months of creditable service at UNC-CH. • She was given a State ID and two office keys. • Anita will begin working today.

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the *Non-Beacon to Beacon Action* BPP to complete the exercise.

There are three parts to this Exercise:

I. Initiate Workflow (WF)

II. Wait as Instructor demonstrates the Agency and Funding approval process

III. Complete Approved PCR from the Initiator's Inbox

PART I - Initiate Workflow (WF) as Initiator

1. Assume the following: you have already run the Cross Verification Report and were not able to locate the employee in the system. You used PPOSE and verified that the position is vacant. You checked PMIS and did not find a record.

2. On the Easy Access screen, type **ZPAA076** in the Command field.

3. Click **Enter** . The Employee Action Request screen is displayed.

4. Enter the following data:

Field	Value
Last 4 digits (SSN)	**Create a 9-digit SSN** and record it on your Transaction Log for Exercise 3.2. **Important!** Write down the nine numbers you used on your Transaction Log because you will need them again. Enter the last 4 digits in the **SSN field**. **FOR TRAINING ONLY!** If you receive a message that the security number is already assigned to another employee, just continue entering a combination of numbers (except the last 4) until it is accepted. **NOTE**: You only have to enter the last 4 SSN when you are processing a New Hire or Non-Beacon to Beacon. For all other Actions, you do not enter the last 4 SSN.
Employee Name	Anita ________________ Create a last name and record the entire name on your Transaction Log.
Effective on	Today's date. Record on your Transaction Log.
Action Type	Non-Beacon to Beacon
Reason	Transfer Lateral

5. Click the **Enter** button.

6. Click the **Create** button. The second screen of the Employee Action Request screen is displayed.

7. From the table below, select the Position number assigned to you by your instructor and enter it into the **EE Position** field.

	POSITION #: *Office Assistant IV*							
A	65001674	F	65001679	K	65001684	P	65001689
B	65001675	G	65001680	L	65001685	Q	65001690
C	65001676	H	65001681	M	65001686	R	65001691
D	65001677	I	65001682	N	65001687	Inst 1	65001692
E	65001678	J	65001683	O	65001688	Inst 2	65001693

Record the position number you used on your Transaction Log.

8. Click **Enter** .

   Observe that the Employee Group and Employee Subgroup fields are now populated.

9. Enter the following data:

Field	Value
EE Group/Subgroup	Observe that the Employee Group and Employee Subgroup fields are now populated. When the Position number is entered, the HR/Payroll system defaults the Employee Subgroup to FT Perm (S or N-FLSAOT depending on the position). You will change as applicable for the Action you are processing. For this exercise, **leave the default**.
Annual Salary	**Minimum of salary range**
Payscale Level	**GR**

> **NOTE**: Observe the Last Date Worked field will not be used now, but would be used in appropriate Actions.

10. Click the **Enter** button.

11. Click the **Save** button. The Information pop-up is displayed with the assigned PCR number.

12. Write the **PCR** number on your Transaction Log.

13. Click to close the pop-up.

14. Click the **Services for Object** button.

> **NOTE**: This button is not available until you save the PCR. The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon. Private notes can only be seen by the Initiator.

15. Select **Create > Create Note**.

16. Enter a **note title**.

17. Click in the note section and type applicable information to send along with the PCR. For training only, use the pre-written notes on your PC desktop.

> **NOTE**: The notes that you type are only recorded in the Workflow PCR; they do not follow in the PA Action. Private notes can only be seen by the person who created them.

18. Click the **green check** to close the notes. If applicable, close the notes icon menu.

19. Click **Enter.**

20. Click **Save.**

21. Click the Initiate WF button. The Information pop-up is displayed indicating that the PCR has been submitted.

22. Click the **green check** button to close the Information pop-up. You are returned to the Employee Action Request (first screen).

PART II - Wait for Instructor or Navigator to Approve the PCR.

There are two approval levels:

- Agency
- Funding

Your instructor and/or navigator will perform this part.

PART III - Complete Approved PCR from Initiator's Inbox

NOTE: If you are on the Employee Action Request screen, use the Back button to return to the Easy Access Screen.

23. From the Easy Access screen, click **SAP Business Workplace** .

24. Click the **node** beside Inbox Inbox to expand it.

25. Double-click **Workflow**. The PCRs that have been approved (or rejected) are listed in the right column.

26. Single-click the **PA PCR** you want to process.

27. Before you process the PCR, make a copy of the note in order to paste it into the Actions infotype.

28. Click **Execute** (or double-click the PCR line item). The system automatically takes you to the applicable screen for the Action (in this exercise, it is the Hiring Action screen).

> **CAUTION!**
> HR/Payroll Actions are designed to be completed from beginning to end; it is not appropriate for one person in the Agency to enter some of the infotypes and someone else to go in and use PA30 to complete the infotypes individually. The Action has dynamic processes that take place behind the scenes which affect time and payroll. Completing the Action in a piece-meal manner does not allow these dynamic processes to take place which causes errors in the employee's time and payroll processes at a later date.

29. With the PCR still selected, click the **Execute** (or double-click the PCR line item). The system automatically takes you to the applicable screen for the Action.

30. On the Hiring Action screen, enter the following data:

Field	Value
SSN CRITICAL NOTE: You must always enter the SSN listed on the SS Card. The number is verified and will kick out of payroll.	On the Non-Beacon to Beacon Action screen, you must enter the complete nine-digit social security number you recorded earlier on your Transaction Log. In Workflow (ZPAA076), you only entered the last 4 digits. **CAUTION!** Be sure the last 4 digits are the same as the ones you previously entered on the Employee Action Request screen. **For Training only:** If you receive a message that the security number is already assigned to another employee, just continue entering a combination of numbers (except the last 4 digits) until it is accepted.
DOB	**04/01/1975**
Gender	**Female**

31. Click the **Enter** button and then the **Execute** button. The Personnel Actions screen is displayed with an assigned personnel number.

32. Write the new Personnel number (PERNR) on your Transaction Log.

33. On the Personnel Actions screen, enter:

Field	Value
From	**Today's date** (this must always match the date you entered on the Employee Action Request screen).
Action Type	**Non-Beacon to Beacon**

34. Click **Enter** .

35. Click **Execute** .

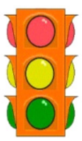
NOTE: It is a best practice to always save a pre-populated infotype even if you do not make changes. In some cases, there are dynamic infotypes that display only when the previous infotype was saved. If you use the Next record button instead of saving, those dynamic infotypes will not display and the employee's record will be incomplete.

36. Complete the following fields:

Field	Value
Create Actions (IT0000)	
Enter note copied from the Employee Action Request screen	From the menu bar: • Select **Edit** • Select **Maintain text**. • Click **Enter.** • Use **Ctrl+V** (or right-click and select Insert) to paste the note from the PCR. • Click **Enter**. • Click **Save**. • Click **Save** as needed to bypass warning messages again.
Reason for Action	Observe the field defaulted from the Employee Action Request screen.
Reference Per. No	Leave blank
Position	Observe the field defaulted from the Employee Action Request screen.
EE Group/Subgroup	Observe the field defaulted from the Employee Action Request screen. If you forgot to make the applicable changes on the WF, you can make the changes now. Be aware, however, that when an audit is run of your Actions, this will show as a discrepancy. **Enter** and **Save**.
Create Personal Data (IT0002)	**Critical!** – Do not change the Name Format field default. This field should ALWAYS be “00”. **NOTE**: It is important to SAVE this infotype.
Marital status	**Single**
Gender	**Female**
Dependents	Leave blank (this field is not used during the New Hire Action.) Click **Enter** and **Save** .
Create Organizational Assignment (IT0001)	Click **Enter** and **Save** .
Delimit vacancy	**Yes**
Create Date Specifications (IT0041)	Review for accuracy. Click **Enter** and **Save** .

Create Addresses (IT0006)	
Permanent address	**67 Bill Ding Rd** **Raleigh NC 27604** **Wake County**
Telephone	**919-867-5309** Click **Enter** and **Save** .
Tax screens (IT0207, IT0208, IT0209)	These all default from the previous information you entered. Review for accuracy. Click **Enter** and **Save** .
Create Withholding Info W4/W5 US (Required) (IT0210)	**Single (01)**
Allowances	**1** Click **Enter** and **Save** .
Create Withholding Info W4/W5 US – State Filing Status (IT0210)	**Single (01)**
State Allowances	**1** Click **Enter** and **Save** .
Create Addresses (IT0006)	
Emergency	**Iona Clinic** **1212 Mettie Cal Dr** **Raleigh NC 27604** Telephone: **919-898-4545** Click **Enter** and **Save** .
Mailing address	Use **Next Record** to skip
Create Monitoring of Tasks (IT0019)	You are using the Monitoring of Tasks infotype to remind you of a task that you need to follow up on concerning the employee (like a tickler file). For this exercise, click **Next Record** to skip.

Create I-9 Status (IT0094)	
Residence status	Click the drop-down and select **Citizen**. Be aware that if an employee is not a citizen, you would make a different choice in the drop-down, and a second infotype (IT0048 Residence Status) would display. See the Student Guide for details concerning how to process IT0048. **NOTE**: The OSC HR/Payroll system entry for non-Citizen employees does not replace Windstar—you must still enter non-Citizen employees into the Windstar system, the official system of record for non-citizen employees.
ID Type	Click the drop-down and select **U. S. Driver's License w/ Photo**. Observe there are additional options in the Employment Verification section of the screen. **NOTE**: There are other options in the Employment verification section like birth certificate, social security number, etc.
Issuing Authority	**North Carolina**
ID#	**NC654321**
Dates	**Issued** 06/30/2013 **Expires** 12/31/2018
Work Permit	**Value: US Social Security Card**
Issuing Authority	**SS Administration** **Enter** and **Save**.
Create Communication (IT0105) **NOTE:** This is the telephone number used in the NC Gov employee directory.	**919-259-4574**. This infotype is for the entry of the employee's office telephone. Click **Enter** and **Save** . You may receive a warning that the ID number is already in use. Click **Enter** to bypass the warning.

Create Planned Working Time (IT0007)	It is critical that you review this infotype. The planned working time defaults based from the employee's organizational structure. **It is especially important to check the part-time box when applicable.** **For this exercise, accept the default.** Observe that when you click Enter, the hour field automatically populates. The weekly workday field does not default. Do not enter data in the weekly workday field. **NOTE:** Be sure the Annual Work hours equal 2080. Be sure the Employee Percent is 100%. Click **Enter** and **Save** .
Create Basic Pay (IT0008) 	Reason: **Non-Beacon to Beacon** **IMPORTANT:** It is **Important** that you always enter the Reason field and that you use the same reason as the Action type. **NOTE:** Observe that the salary defaulted from WF. Observe also that the value is USD which has automatically populated. If the employee was assigned to a DOT position, the HR/Payroll system would automatically change the field to USDN. All permanent DOT positions require 5 decimals on the Basic Pay infotype (0008). If the DOT employee is a temporary employee, the field will remain as USD because 5 decimals are not required for DOT temporary employees. Click **Enter** and **Save** .
Possible subsequent activities	• Click the **green check** to get to the enrollment screen. • Double-click the **Automatic offer** option in order for TSERS to display. • Click the **Enroll** button. • Click **Enroll** again. • Click **Continue**. • Click the **Back** button (top of screen). • Click the **red X** to return to the data entry screen.

Create Bank Details (Required) (IT0009)	The completion of the Bank Details infotype (IT0009) must be entered in order for payroll to run on the new employee. If the bank details are not available at the time of the data entry, set up a paper check. It is your responsibility to obtain that information and enter the infotype before the system is closed for payroll processing. Even if you have instructed the employee to enter the data in ESS, you still must follow up with the employee to ensure he or she makes the entry prior to payroll closing. You must obtain high level approval before you can change the field from "direct deposit" to "check". In order to change the field to "check" you must fill out the proper forms and receive higher level approval. **IMPORTANT**: Only change an Employee's bank details if you have documentation to do so from the employee, such as a direct deposit form signed by the employee which would include a bank deposit slip or voided check. You need to keep this documentation after you make the change.
Bank routing (key)	**021312971** (Capital Bank and Trust)
Bank account number	**234987656**
Bank Control key	**01** (01 is checking; 02 is savings) Click **Enter** and **Save** .
Create Additional Personal Data (IT0077)	
Ethnic Origin	Use your own
Military status	Leave blank
Veteran status	**Non-veteran**
Disability status	**None/prefer not to report** Click **Enter** and **Save** .
Subtype for Infotype "Education"	**Select High School** Click the **green check** to close.
Create Education (IT0022)	
Start and to	**09/01/1992 - 05/30/1995** **NOTE**: You are entering the dates the employee indicated they attended the institution.
Institution location	________ **High School** (use your High School)

Verified	**High School 02** **NOTE:** You would only choose 02 if your Agency does not require verification of high school education; otherwise you would use the pending code. **Enter** and **Save**
Monitoring of Tasks (IT0019)	Use the **Next Record** button to skip infotype. **NOTE:** You would skip this infotype if your agency does not require verification of high school education; otherwise you would enter the applicable date on this infotype indicating when you expected to have the verification completed.
Subtypes for infotype Certification and Licensing	Click **X** to remove pop-up window. This infotype is used when the position requires a specific certificate or license.
Create Objects on loan (IT0040)	**State ID** **1/pieces** **NOTE:** On the Action, you are to only enter one item on loan. If the employee receives more than one item, you will use PA30 to add the additional items. **Enter** and **Save**

37. Click the **Back** button at the Personnel Actions screen (the system automatically returns you to Personnel Actions when you finish the last infotype within the Action.

38. The pop-up is displayed indicating that the item must be explicitly completed. Click **Complete Work Item** Complete Work Item .

NOTE: It is critical that you complete this last step. Also be aware that if you canceled the PCR without finishing the Action (which put the PCR back into your Inbox), when you click the Complete Work Item button, you will receive another screen where you have to indicate again that you have finished the Personnel Action.

39. Click PA Action Completed at the Decision Step in Workflow screen (middle option).

40. Click the **Back** button to return to the Easy Access screen.

Using PA30 to add additional Objects on Loan

41. Access **PA30** to add the office keys to IT0040. Refer to Exercise 3:1 beginning at Step 38 if you need help.

Using PA30 to add IT0552

Creditable service earned PRIOR to BEACON must be entered via PA30 on IT0552; however you will not perform that part of the exercise in this class.

Additional Resources
You can find several additional support materials about the Non-Beacon to Beacon Action on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/ Follow this path to access the latest versions of BPPs and Job Aids: *Personnel Administration > BPPs* • Non-Beacon to Beacon Action *Personnel Administration > Job Aids* • Non-Beacon to Beacon Action Guide • PA Actions Reasons Definitions

TIPS & TRICKS: Prior State Service –
IT0552 – Time Specifications/Employment Period

- *New Hire/Non-Beacon to Beacon Actions*

  You can insert prior State service for new hires and Non-Beacon to Beacon actions only. Once an employee is entered into the HR/Payroll system, the system automatically calculates creditable service and the longevity through the Time service dates (after you verify that the employee is entitled). If the employee has prior service from more than one agency, create a separate IT0552 for each service record. IT0552 calculates the number of months of prior service based on the dates that were entered. If the months do not calculate correctly, contact BEST HR through submission of a ticket.

- *Insert Prior State Service and Incorrect IT0552s*

  IT0552 is maintained by BEST HR through submission of a ticket. <u>Do not change the date on the original (conversion) IT0552 so that it calculates the total time</u>. If the conversion data is incorrect or you need to insert prior State service, submit a completed creditable state service form to BEST HR (rather than manipulating the end date on the original IT0552).

  For example, an employee has an HR/Payroll system record of 50 total service months with the State and leaves State employment to work for a local government agency from which the State accepts time worked. When the employee is re-instated into the HR/Payroll system, submit the completed form to BEST HR.

- *Length of Service*

  If you have the "Display Time" role, you can use PT_BAL00 to view the latest number of months of service. See the online *Length of Service* Job Aid for details on accessing the transaction.

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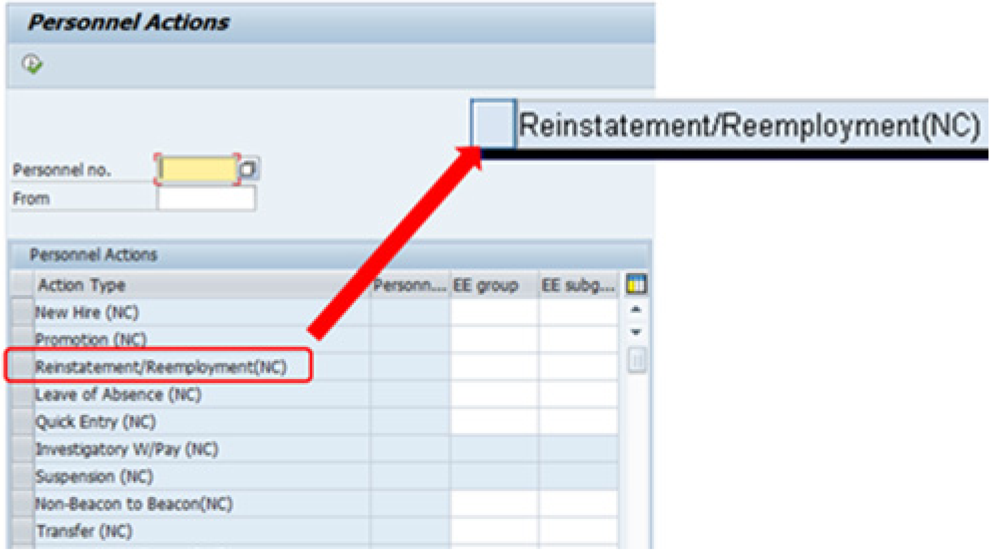
Reinstatement/Reemployment Action

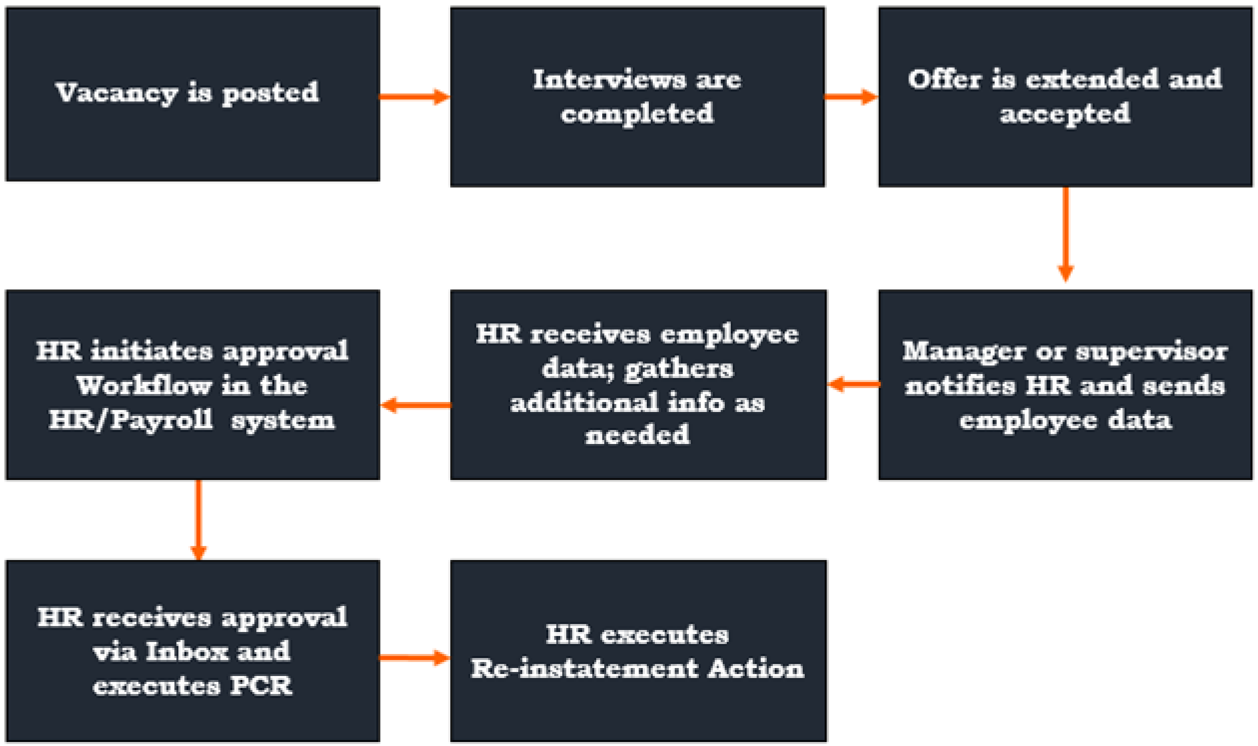


Reasons associated with the Reinstatement/Reemployment Action	
• Return to State within 12 months (same salary grade)	• Return from WC Complete
• Return to State within 12 months (higher salary grade)	• Return from Educational Leave
• Return to State within 12 months (lower salary grade)	• Return from FMLA
• Return to State within 5 years	• Return from Family Illness
• Return to State after 5 years	• Return from Parental
• Return from Short-Term Disability Trial Rehab	• Return from LOA Other
• Return from Short-Term Disability Complete	• Return to Supplemental
• Return from Long-Term Disability	• Rtn from STD with Restrictions
• Return from Disciplinary Suspension	• Non-BEACON Transfer Lateral
• Return from Investigatory Placement	• Non-BEACON Transfer Reassignment
• Return from Military	• Non-BEACON Transfer Promotion
• Return from WC with Restrictions	• Non-BEACON Transfer EPA-SPA
	• Non-BEACON Transfer Class/Pay Plan Change
	• Return from Military Care Giver Leave

Sick Leave Balance

If employee is returning within 5 years, the sick leave quota will still be active in the system. However, in the future if employee returns ***after*** 5 years, then the re-instating agency will need to delimit the 'old' sick leave quota to a date before the reinstatement date.

Reinstatement/Reemployment Process



Although there is only one Reinstatement/Reemployment Action, there are two instances in which it is used: (1) returning an employee from LOA (covered in *Advanced Create and Maintain Employee Data*) or (2) reinstating a former HR/Payroll employee (who has a record in the HR/Payroll system). The difference between the two are the number of infotypes the Action presents. When you are returning an employee from LOA, you are presented with fewer infotypes than when you are returning a previous HR/Payroll system employee to employment. In the latter, you are presented with the same number of infotypes as a New Hire Action. The above process describes a Reinstatement/Reemployment from Separation.

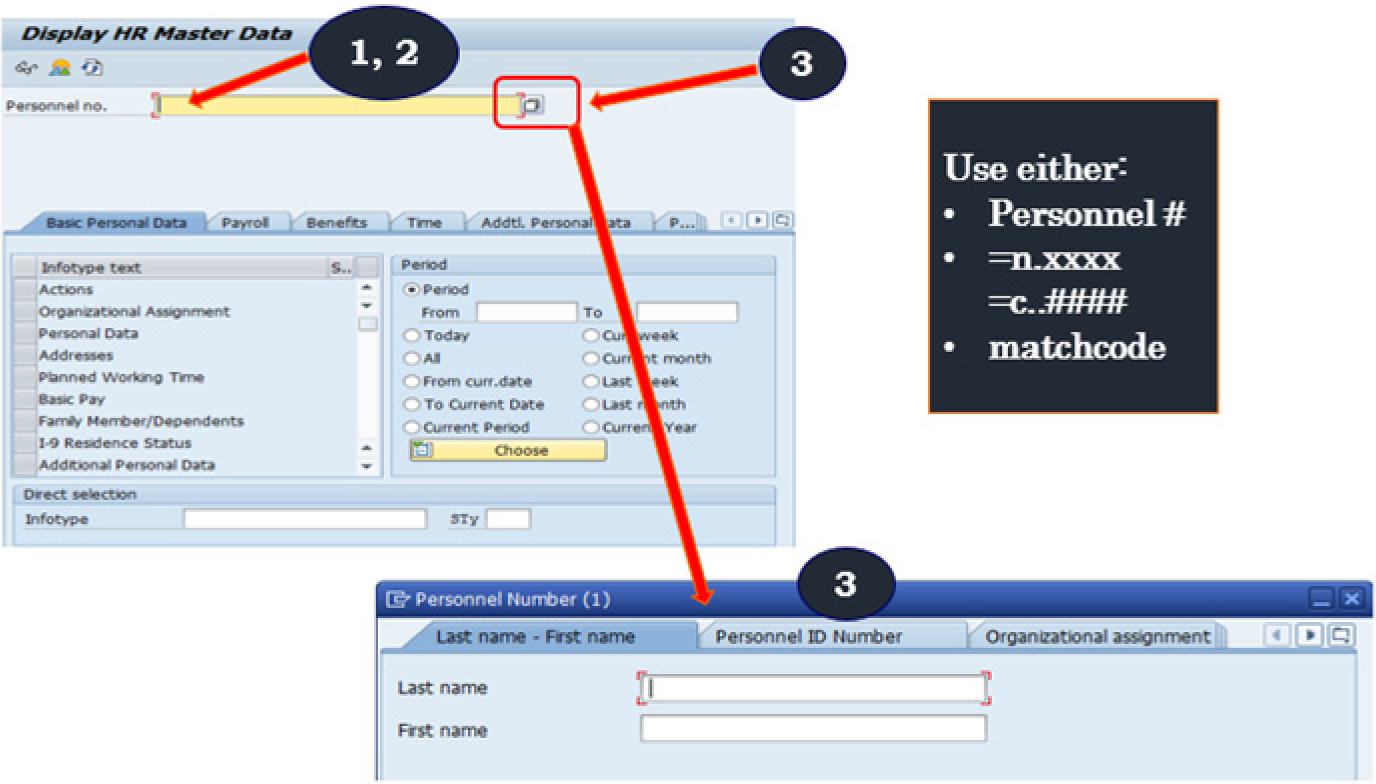
Employees who separated within three months of cut over to the HR/Payroll system were converted into the system. Therefore, if any of those employees come back to work for the State, you should use the Reinstatement/Reemployment Action.

Cost Distribution Infotype (0027)

This infotype is created for every employee when they are separated. The position defaults to 99999999. When an employee is separated, the cost distribution is assigned to the employee. This ensures that employees who receive any type of payment after separation will be able to receive those payments. IT0027 copies IT1018 on the position.

> **Very Important!** - During a Reinstatement/Reemployment Action, the *Cost Distribution Infotype (0027)* will automatically be delimited from the system when you complete the process.

Finding an Employee



Use either:

- **Personnel #**
- **=n.xxxx**
  =c..#####
- **matchcode**

Finding employees

Before you can process existing or previous employee data you must access the employee's record. There are a variety of ways you can search for an employee:

1. ***Personnel Number***: Enter the Personnel Number into the Personnel no. field.

2. ***Shortcut***:

   A. Use a shortcut (**=n.xxxx**) in the Personnel No. field to search by last name.

   (**Example**: =n.hendrix - NO spaces.)

   A list of all employees with that last name displays. Double-click to select the appropriate employee.

   B. Use a shortcut (**=c..####**) in the Personnel No. field to search by SSN.

   (**Example**: =c..123456789 - NO spaces.)

3. ***Matchcode***: Use the Matchcode at the end of the Personnel No. field to search by last and first name, or by Personnel Number, or by org assignment.

Verifying the Action is appropriate

Before you initiate an Action on a current employee, it is a best practice to verify that the Action you are about to take is applicable. For example, you cannot reinstate an employee who does not have a Separation Action as the current record. Use PA20 and the overview of the Actions infotype to verify that the Action you are about to take is appropriate.

Additional Information

Position default number

Observe on the Organizational Assignment infotype that the employee's Position number defaulted to one with a series of 9's. When an employee is separated, his or her position always defaults to 99999999.

Prior service verification

As indicated earlier, prior service is not entered during the New Hire, Non-BEACON to BEACON or Reinstatement/Reemployment Actions. After you verify that the employee is entitled to prior service, you must access PA 30 and enter the dates of prior service on infotype **Time Specification/Employ. Period (IT0552)**. This is for the New Hire and Non-Beacon to Beacon only. For Reinstatement/ Reemployment actions, you must fax the completed creditable service form to BEST.

🗁 **NOTE**: IT0552 has been enhanced with a link to the OSHR document for creditable service conditions. The star in front of the employer lets the user know they should reference the document.

Viewing previous employee data

If your security access permits, run the Verify Employment report found in the Cross Agency Verification folder to validate the employee's personnel record as required.

Reinstatement/Reemployment within 90 days

When an employee is reinstated/reemployed <u>within 90 days</u>, the system presents the Direct Deposit with the 12/31/9999 date and deletes the check on IT0009 (Bank Details). When an employee is reinstated/reemployed <u>after 90 days</u>, the system presents the Check with the 12/31/9999 date.

Longevity

> **Important!**
> When an employee is reinstated (or Non-Beacon to Beacon) and received a pro-rated longevity you need to create a IT02012 / Z033 to document the pro-rated longevity already received so employee doesn't get a full payment when the year is complete.

* *

EXERCISE 3.3: Reinstatement/Reemployment

SCENARIO
Karla Hart formerly worked with the State of North Carolina and left for the private sector. After only a few months, she decided to come back to the State. The employee is returning to Cultural Resources as an Information & Communications Spec I, which is the same position (salary and grade) that she held before she left. • The salary is the minimum of the salary range.

Instructions

NOTE: In your work environment, you only add a certification or license when it is a requirement of the position. In Karla's case, the license is not a requirement but is being presented here for you to enter in order to give you the training experience.

If a returning employee's data on an infotype has not changed, you STILL save the infotype in the Action.

In this exercise some of the employee's information, like addresses, has changed since she was last employed by the State. Make the changes as applicable during the Reinstatement/Reemployment Action; however, remember to save a pre-populated infotype even no changes were made to it.

There are three parts to this Exercise:

I. Initiate Workflow (WF)

II. Wait as Instructor demonstrates the Agency and Funding approval process

III. Complete Approved PCR from the Initiator's Inbox

PART I - Initiate Workflow (WF) as Initiator

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the *Reinstatement/Reemployment Action* BPP to complete the exercise.

1. Assume the following: you have already run the Cross Verification Report and were not able to locate the employee in the system. You used PPOSE and verified that the position is vacant.

2. On the Easy Access screen, type **ZPAA076** in the Command field.

3. Click **Enter** . The Employee Action Request screen is displayed.

4. From the table below, select the Personnel number for Karla Hart assigned to you by your instructor and enter it into the **Personnel number** field.

	PERSONNEL #: *Karla Hart*						
A	80000125	F	80000130	K	80000135	P	80000140
B	80000126	G	80000131	L	80000136	Q	80000141
C	80000127	H	80000132	M	80000137	R	80000142
D	80000128	I	80000133	N	80000138	Inst 1	80000143
E	80000129	J	80000134	O	80000139	Inst 2	80000144

Record the Personnel number you used on your Transaction Log.

5. Click **Enter** .

NOTE: You do not need to enter the SSN except on New Hire and Non-Beacon to Beacon Actions.

6. Enter the following data:

Field	Value
Effective on	**Today's date.** Record on your Transaction Log.
Action Type	**Reinstatement/Reemployment**
Reason	Select the appropriate reason. The employee was separated three months ago. **01 Rtn S w/in 12 months (same salary/grade)**

7. Click the **Enter** button.

8. Click the **Create** button. The second screen of the Employee Action Request screen is displayed. Observe that the Current column has data concerning the employee as a quick reference.

Observe that the position field is 9s. When an employee is separated, the position field is either automatically changed to 9s by the HR/Payroll system, or in the case of a Separation Pay Continuation, by the Master Data Maintainer.

9. From the table below, select the Position number assigned to you by your instructor and enter it into the **EE Position** field.

	POSITION #: *Information & Communications Spec I*						
A	65001957	F	65001962	K	65001967	P	65001972
B	65001958	G	65001963	L	65001968	Q	65001973
C	65001959	H	65001964	M	65001969	R	65001974
D	65001960	I	65001965	N	65001970	Inst 1	65001975
E	65001961	J	65001966	O	65001971	Inst 2	65001976

Record the Position number you used on your Transaction Log.

10. Click **Enter** .

Observe that the Employee Group and Employee Subgroup fields are now populated.

11. Enter the following data:

Field	Value
EE Group/Subgroup	If **B1** does not default, change to the appropriate subgroup to indicate that the employee is full-time, subject to overtime. **NOTE**: When the Position number is entered, the Employee Subgroup defaults to FT N-FLSAOT Perm and must be changed as applicable for the Action.
Annual Salary	**Minimum of salary range**

NOTE: By design, the step-by-step directions to complete the Action are deliberately left out of this exercise. Use the information you have learned in previous exercises to complete the application sections. Alert your instructor or navigator if you need assistance.

To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and receive the PCR number with the date
- Write a note for the approvers
- Initiate Workflow

PART II - Wait for Instructor or Navigator to approve the PCR

There are two approval levels:

- Agency
- Funding

Your instructor and/or navigator will perform this part.

PART III - Complete Approved PCR

🗁 **NOTE**: In this exercise, you are entering data on an employee who already exists in the system. As a result, on each infotype you will receive a message indicating that the previous record will be delimited. Press Enter or click the Enter button to bypass the warning.

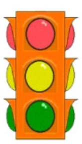
For Part III, use the information you learned from previous exercises to process the approved PCR. As the Initiator:

- Execute the approved PCR
- Enter the applicable date and Action on Personnel Actions screen
- Write the system-generated PERNR on your Transaction Log.
- Process each infotype as applicable as outlined below.

  🗁 **Critical!** – Do not change the Name Format field default on IT0002. This field should ALWAYS be "00". Don't forget to SAVE the infotype.

- Remember that on the Actions and Basic Pay infotypes you should always use **Edit > Maintain text** to write the appropriate note. Use steps in Ex 3.1 for help in copying and pasting comments from the PCR to the Actions Infotype.
- Explicitly complete Workflow item

Field	Value
Personal Data (IT0002)	**Last Name: HartXX** (XX=the specific PERNR you are using for class) **First Name: Karla** <u>Verify</u> all other displayed data to ensure any changes needed are made at this time
Addresses (IT0006) Permanent 🗁 **NOTE**: Enter address information on Address line 1.	**3368 Ali Katt Ave** **Apex, NC 27502** **Wake County** **Telephone: 919-257-4578**
Federal Withholding (IT0210)	**Single, with 1 allowance**
State Withholding (IT0210)	**Single, with 1 allowance**
Addresses (IT0006) Emergency	Add the name **Darren Deeds**. The address stays the same.
Monitoring of Task (IT0019)	Employee has over 12 months of service in the system relating to this position. In this situation, she has no need for probation. **Skip** this record.

Create I-9 Status (IT0094)	US Citizen NC Dr. License #7761272 Issuing Authority - NCDMV Issued 07/01/2009, Exp. 07/01/2017 Valid Social Security Card Issuing Authority - SS Administration
Communication (IT0105)	919-707-4566
Create Planned Working Time (IT0007)	It is critical that you review this infotype. The planned working time defaults based from the employee's organizational structure. **It is especially important to check the part-time box when applicable.** For this exercise, accept the default. Observe that when you press Enter, the hour field automatically populates. The weekly workday field does not default. Do not enter data in the weekly workday field. ***NOTE:*** *IT0007 - Planned Working Time date will change to first of the month the employee is being reinstated in unless separation/reinstatement is in the same month. This only applies to monthly employees returning from separation. This does not apply to Return from LOAs.* **Enter** and **Save**
Create Basic Pay (IT0008) 	Reason: **Reinstatement/Reemployment** Salary defaulted from the Workflow PCR
Possible subsequent activities	Enroll the employee into TSERS
Create Bank Details (IT0009)	
Bank routing	**011001742** – Bank of America
Bank account number	2157884 Change to **Direct Deposit**
Bank Control key	**01** (01 is checking; 02 is savings). Observe that when the employee separated, the bank method field may have defaulted from direct deposit. You must change the default back to direct deposit. **NOTE**: The system no longer changes the default of the bank method of a separated employee to paper check. Accept delimit message.

Create Additional Personal Data (IT0077)	Ethnic Origin – **use your own** Military Status – **Inactive** Veteran Status – **Recently Separated Veteran (07/04/2011)** Disability Status – **None/prefer not to report**
Subtypes for infotype "Education"	**Master's degree** from **Wake Forest** **10/01/1998 to 12/15/2002**
Create Monitoring of Tasks (IT0019)	Reason: **Credential Verification**. Indicate that you will verify within **90 days**, and that you want to be **reminded 15 days prior**.
Subtypes for infotypes "Certification and Licensing"	Select **0011 – Licensed counselor**.
Create Certification and Licensing (IT0795)	The Start and To dates <u>must be exactly the same</u> as the Valid from and Valid To dates.
Start Date	**07/01/2012**
To Date	**06/30/2016**
Identification	The certificate # is **NC0932454**
Doc Status	Select **Renewable**
Valid from	**07/01/2012**
Valid to	**06/30/2016**
Copy Date Specifications (IT0041)	Delete the **Last Day Worked** information. Verify dates and **Save** .
Create Objects on loan (IT0040)	Office key **#987**

12. Click the **Back** button when you are automatically returned to the Personnel Actions screen.

13. The pop-up displays indicating that the item must be explicitly completed. Click **Complete Work Item** Complete Work Item .

NOTE: It is critical that you complete this last step.

TIPS & TRICKS: Date Specifications Codes

- **01 – Original Hire Date** - An employee's Original Hire Date will represent the date the employee was first hired by the State. This date will remain the same throughout the employee's State career and should not be changed.
- **02 – Agency Hire Date** - An employee's Agency Hire Date is initially set to the employee's hire date. This date type is maintained when an employee is reinstated following a leave of absence or transfers from one State agency to another State agency. If an employee is hired at Judicial, then the following date types are also maintained to track agency specific service.
- **03 – Last Day Worked** – represents the employee's final day of work prior to a separation from the State.
- **04 – Judicial Anniversary Date** – represents the date an employee is hired into or transfers to Judicial specific jobs. The anniversary date will be used to manage agency specific service.
- **06 – Notification of RIF** – The date an employee is officially notified his/her current position will no longer be available. This date also represents the beginning or the 12-month period of RIF eligibility and benefits.
- **07 – Lottery Anniversary Date** – represents the data into which an employee is hired or transfers to NCEL. The anniversary date will be used to accrue an employee's personal leave day each year and to manage agency specific service.
- **08 - Supplemental Hire Date** - represents the date the Supplemental Staff was hired or reinstated.
- **NR – 457 Catch-Up Date** – An employee's normal retirement date represents the date at which the employee will turn 65 and is thus eligible for additional contributions into his or her 457 Savings Plan. Date type NR will only be created if an employee is eligible and requests to make additional 457 contributions. (Created by BEST Benefits Only)

DON'T FORGET...

Check the Leave balances to ensure that they are correct upon the Reinstatement/Reemployment Action (Reason: Return to State Government within 12 months).

- For example, those employees who leave and reinstate within the same calendar year, the system grants pro-rated Community Service Leave on top of what the employee may have already. The system is hard-coded in the background to only allow the consumption of 24 hours of CSL, therefore it will incorrectly display.
- If a Holiday which the employee was not eligible to have upon Separation was not reduced at Separation, it will move to Holiday Comp upon Reinstatement-giving an employee an overstated Leave balance.

This exercise is complete.

Additional Resources
You can find several additional support materials about the Reinstatement/ Reemployment Action on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/ Follow this path to access the latest version of the Reinstatement/ Reemployment BPPs and Job Aids: *Personnel Administration > BPPs* • Reinstatement/Reemployment Action *Personnel Administration > Job Aids* • Reinstatement/Reemployment Action Guide • PA Actions Reasons Definitions • Longevity Job Aid

* *

General Information Reminders

Social Security Cards

Please do not email copies of Social Security Cards to BEST Shared Services. All Social Security Card copies should be faxed to the BEST secure line at 919-855-6861. This fax number does not produce physical copies on a machine.

Complete Processing of a PCR

Just because a PA PCR is "set to complete" does not mean that the action is processed. Remember that all applicable infotypes must be saved.

SUMMARY

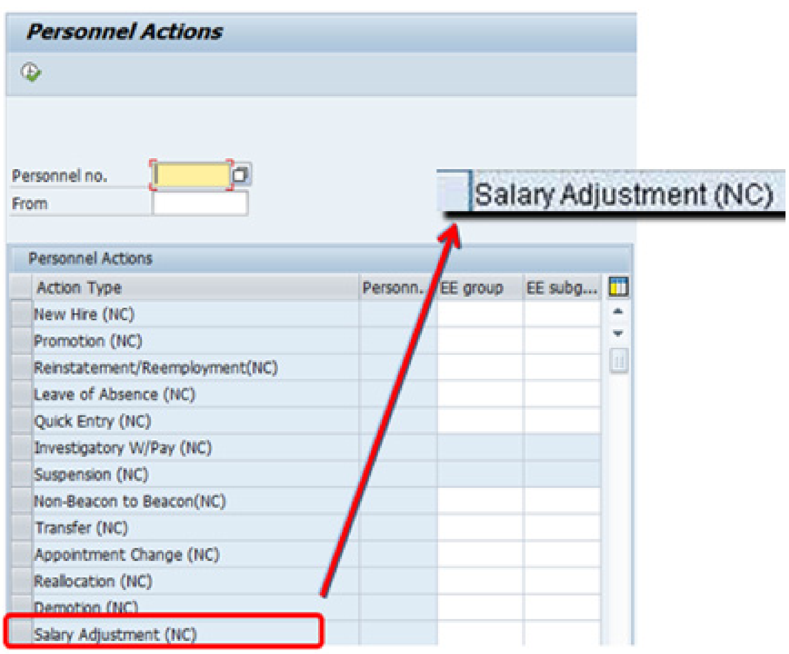
This lesson described how to process various Actions. We also learned how to use the appropriate Action to assign employees to the HR/Payroll system. This lesson also explained how to select the applicable reason for each Action. We learned how to distinguish between the three hiring actions for an employee.

Adjusting Salaries

Objectives

- Distinguish between making a salary adjustment, appointment change, range revision and a reallocation
- Identify the job adjustments that must be made prior to creating a range revision and reallocation action
- Describe the difference between range revision and reallocation actions when funds are available, and when funds are not available

Salary Adjustment Action

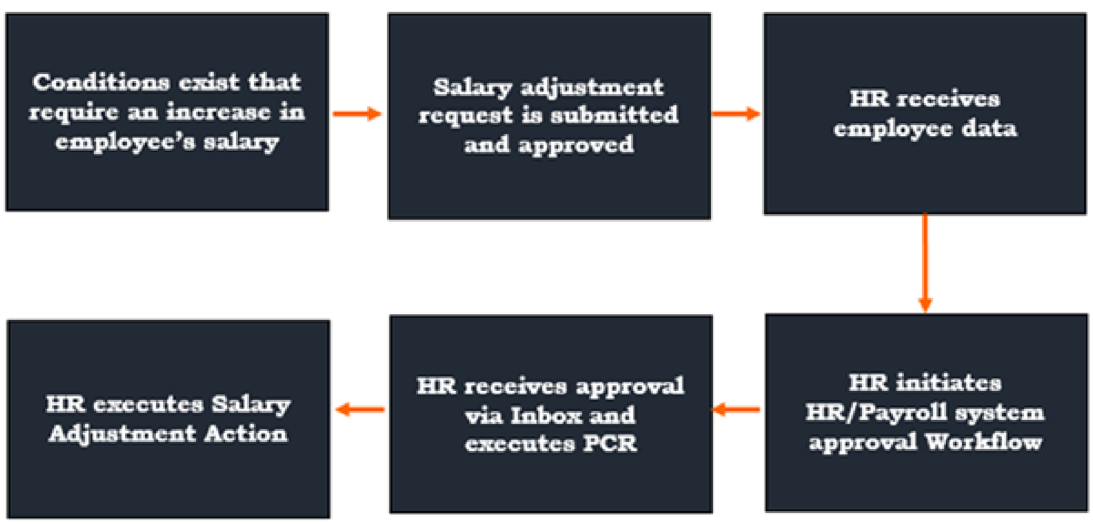


Reasons associated with the Salary Adjustment Action	
• Salary Adjustment	• In-Range-Turnover
• Correct New Hire Salary	• In-Range – Other Labor Market
• Acting Pay	• Geographic Differential
• Retention Adjustment	• Site Differential
• Trainee Adjustment	• Career Growth Recogn Award
• Lead Worker Adjustment	• Legislative Increase
• EPA Supplement Payment	• Performance Increase
• In-range–Higher Level	• LEO Sworn
• In-Range-Increase Variety	• Temp In-Range for Job Change
• In-Range–Equity	• Auto Sal Adj – AOC Only
• In-Range-Retention	• Salary Adjustment Fund

NOTE: Some of the reasons above apply to career banding and some do not. If you do not see the applicable reason in Salary Adjustment for career banding, you will use the Career Progression Action.

DOT - The Department of Transportation (DOT) is currently using a Salary Adjustment Action for SBP and will continue doing so with In-Range Labor Market as the reason. For more information about SBP for DOT, contact the Office of State Human Resources.

Salary Adjustment Process



A Salary Adjustment is a general increase in an employee's salary within the employee's current salary range and within the Agency where the employee is currently employed.

Cancel Salary Adjustment Action

If you give a salary adjustment for any of the reasons listed on the previous page and later determine that it needs to be canceled, use the Cancel Salary Adjustment Action. The same reasons for the Salary Adjustment Action are applicable for the Cancel Salary Adjustment Action.

EXERCISE 4.1: Salary Adjustment Action

SCENARIO

Assume today is the first day of next month. The supervisor of the first employee you hired (**Exercise 3.1**) has been in a serious accident and is out on leave for at least four months. Your employee, who is a Digitization Clerk, is being asked to assume some of the major responsibilities of the supervisor (Digital Project Manager) for a specific length of time. Adjust the salary of the Digitization Clerk so that the employee is receiving acting pay of an additional $4,000 (in annual salary).

- The effective date is the 1st day of next month and will end four months from that date.
- In your work environment, you would use PA30 to enter a reminder (Monitoring of Tasks) to remove the acting pay from the employee at the end of four months.

Instructions

There are three parts to this Exercise:

I. Initiate Workflow

II. Wait for Approver to approve PCR

III. Complete Approved PCR

PART I - Initiate Workflow

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the *Salary Adjustment Action* BPP to complete the exercise.

1. Assume the following: you have already run the Cross Verification Report and were not able to locate the employee in the system. You used PPOSE and verified that the position is vacant.

2. On the Easy Access screen, type **ZPAA076** in the Command field.

3. Click **Enter** ✓. The Employee Action Request screen is displayed.

4. Enter the following data:

Field	Value
Personnel Number	Use the personnel number from the employee you hired in Exercise 3.1. Refer to your Transaction Log for the PERNR that was assigned. For quick reference, write the name and PERNR on your Transaction Log for Exercise 4.1.
Effective on	**1st day of next month**
Action Type	**Salary Adjustment**
Reason	**Acting Pay**

5. Click the **Enter** button.

6. Click the **Create** button. The second screen of the Employee Action Request screen is displayed.

7. Enter the following data:

Field	Value
Annual Salary	Add $4,000 to current Annual salary. • **NOTE**: The resulting salary will place the employee in "Z" step. In addition to the note in Workflow, you would write the appropriate note on both Actions and Basic Pay infotypes to explain the reason for the increase.

To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and record the PCR number effective date of the Action.
- Write a note for the approvers.
- Initiate Workflow.

PART II - Wait for Approver to Approve the PCR

There are two approver levels:

- Agency
- Funding

Your instructor and/or navigator will perform this part.

PART III - Complete approved PCR

For Part III, use the information you learned from previous exercises to process the approved PCR:

- Execute the approved PCR.

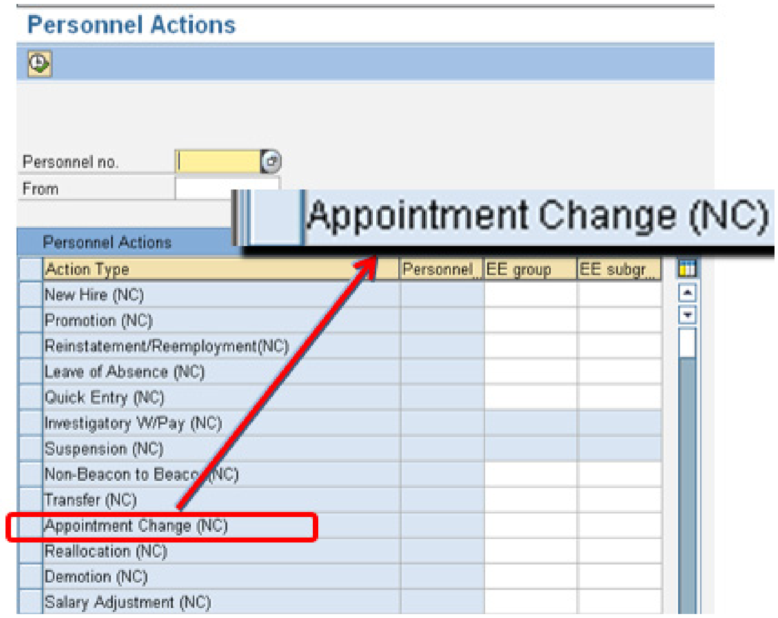
- Enter the applicable date and select the Action on Personnel Actions screen.
- Process each infotype as applicable including a note on Actions and Basic Pay infotypes as appropriate:
  — **CAUTION!** Do not enter an end date on IT0001. Even though the Salary Adjustment is for only 4 months, you do not enter an end date on the Salary Adjustment Action. At the time that the salary adjustment ends, you will use a new Action (Cancel Salary Adjustment) to end the current Action.
  — Don't forget to enter the Reason on IT0008.
- Explicitly complete Workflow item.

This exercise is complete.

Additional Resources
You can find several additional support materials about the Salary Adjustment Action on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/ Follow this path to access the latest version of the Salary Adjustment BPPs and Job Aids: *Personnel Administration > BPPs* • Salary Adjustment Action *Personnel Administration > Job Aids* • Salary Adjustment Action Guide • PA Actions Reasons Definitions • Monitoring of Tasks

* *

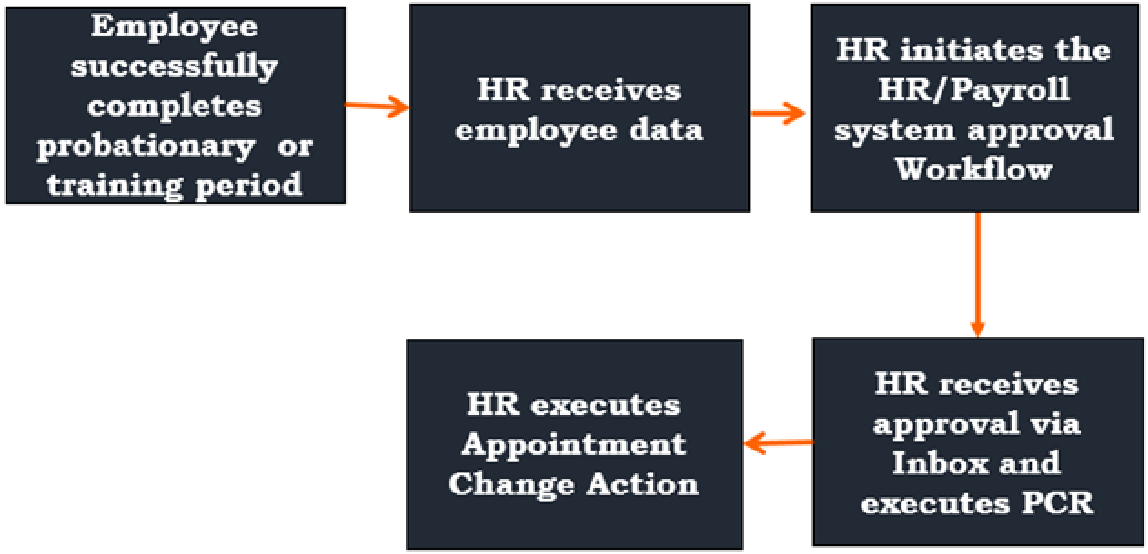
Appointment Change Action



Reasons associated with the Appointment Change Action	
• Time-Limited to Permanent	• Permanent to Time-Limited
• Probation Time-Limited to T/L	• Supplemental to Permanent
• Part Time to Full Time *	• Permanent to Supplemental
• Full Time to Part Time *	• Permanent to Intermittent
• Change in hours *	• Change in FLSA
• Exten of Appt - no money involved	• Supplemental to Time-Limited
• Supplemental to Probation	• Supplemental to Probation TL
• Intermittent to Probation	• Time-Limited to Probation
• Probation to Permanent	• OSC Maintenance Use Only

IMPORTANT! * Do not merely change the hours on IT0007; use the Appointment Change Action as applicable.

Appointment Change Process



An **Appointment Change** occurs when an employee has successfully completed his or her probationary or training period and receives an appointment to either a permanent or a time-limited position. Based upon the supervisor's recommendation, the employee may transition from probationary of two (2) years. In order for the employee to receive an increase in salary, an appointment Change Action (rather than a Salary Adjustment Action) must be used. This is because the employee subgroup must be changed.

When you create an Appointment Change, not all infotypes that display will require that you change information. Your Agency, as well as the type of appointment change, determines this. Here are some of the infotypes or fields that you may need to change:

- Employee Subgroup
  - — if moving from Full-Time (FT) to Part-Time (PT), or vice versa
  - — if moving from probationary to permanent
- Planned Working Time - if moving from FT to PT, or vice versa
- Basic Pay - if salary has changed (usually changes with trainee-to-permanent)
- Monitoring of Tasks – example, trainee progression

The Appointment Change Action allows you to give the salary increase at the same time you modify the Employee Subgroup (a Salary Adjustment Action only allows you to modify the salary).

Employee Subgroup

Keep in mind when you save the Copy Actions (IT0000) infotype for this type of scenario, the employee subgroup determines if the employee is eligible for overtime.

Basic Pay (IT0008) – USD or USDN

Observe that on the salary infotype (IT0008) the value is USD. However, if the employee was a permanent DOT employee, the field would read USDN because DOT permanent positions require 5 decimal currency. In that case, the HR/Payroll system will automatically change the USD field to USDN. The 5 decimal currency rule does not apply to DOT temporary employees.

Changing temporary employees to permanent employees

If a temporary employee accepts a permanent position, one of the following is applicable:

1. If they change position numbers it is either a Transfer or a Promotion.
2. If they don't change position numbers it is an Appointment Change. You will also modify the salary as applicable in the Appointment Change Action. Be sure to justify salary in Maintain Text.

> CAUTION!
> If the Action moves the employee from one payroll type to another (bi-weekly to monthly or monthly to bi-weekly), you only initiate the Workflow. When the Workflow is approved, you contact BEST to complete the Action.

* *

EXERCISE 4.2: Appointment Change Action

> ***SCENARIO***
>
> Gina Naylor was hired in Natural and Cultural Resources as an Administrative Services Assistant V in probationary status and has completed her one year.
>
> - Create an Appointment Change Action to change the employee's status to permanent, full time, not subject to FLSA overtime.
>
>   See the Student Guide for information about changing temporary employees to permanent employees.

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the *Appointment Change Action* BPP to complete the exercise.

There are three parts to this Exercise:

I. Initiate Workflow

II. Wait for approver to approve PCR

III. Complete Approved PCR

PART I - Initiate Workflow

1. On the Easy Access screen, type **ZPAA076** in the Command field.
2. Click **Enter** . The Employee Action Request screen is displayed.

3. From the table below, select the Personnel number for Gina Naylor assigned to you by your instructor and enter it into the **Personnel number** field.

	PERSONNEL #: *Gina Naylor*						
A	10000091	F	10000096	K	10000101	P	10000106
B	10000092	G	10000097	L	10000102	Q	10000107
C	10000093	H	10000098	M	10000103	R	10000108
D	10000094	I	10000099	N	10000104	Inst 1	10000109
E	10000095	J	10000100	O	10000105	Inst 2	10000110

Record the Personnel number you used on your Transaction Log.

4. Click **Enter** .

5. Enter the following data:

Field	Value
Effective on	**Today's date.** Record the date on your Transaction Log.
Action Type	Appointment Change
Reason	Probation to Perm

6. Click the **Enter** button.

7. Click the **Create** button. The second screen of the Employee Action Request screen is displayed.

8. Enter the following data:

Field	Value
EE Group/Subgroup	A1
Annual Salary	Current salary

To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow

PART II - Wait for Approver to Approve PCR

Note to instructor and navigator: There are two approval levels:

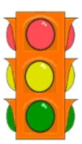
- Agency
- Funding

Your instructor and/or navigator will complete this part.

PART III - Process Approved PCR

For Part III, use the information you learned from previous exercises to process the approved PCR:

- Execute the approved PCR.
- Enter the applicable date and Action on Personnel Actions screen.
- Process each infotype as applicable including a note on Actions.
  — In this case, you don't need Monitoring of Tasks; therefore, it is appropriate to use Next Record skip it.
- Explicitly complete Workflow item.

Field	Value
Create Basic Pay (IT0008) 	Reason: **Appointment Change** The Salary defaulted from Employee Action Request screen.
Monitoring of Tasks (IT0019)	Use **Next Record** to skip since there are no follow-up tasks for this employee.

TIPS & TRICKS: Execute infogroup button

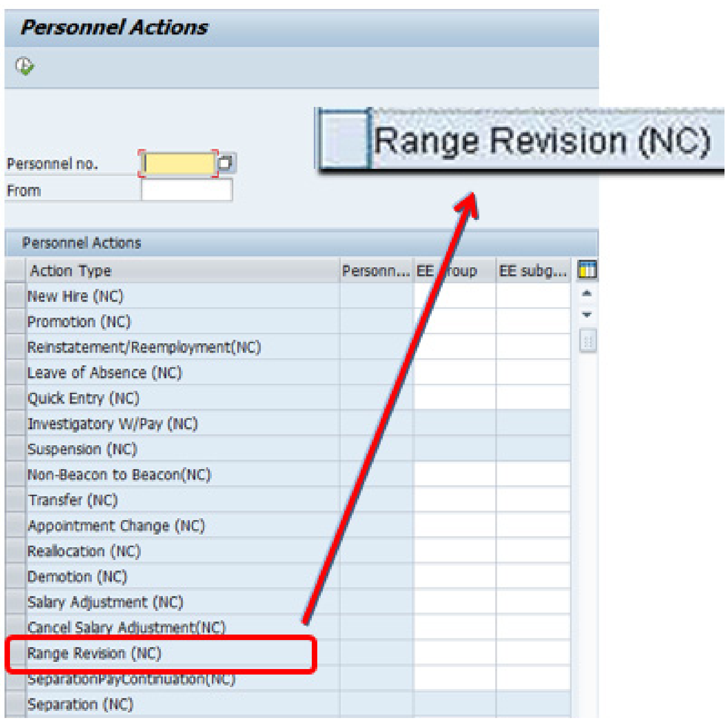
If you accidentally click the Back button during an Action, the system backs you out to the Personnel Actions screen. To return to the infotype you were previously on, select the same Action, date, and personnel number, and click Execute. On the next screen, select **Execute info group**. A warning message is displayed indicating that the personnel action is not saved. Click Continue and page forward until you get to the infotype you accidentally exited. You may notice that some infotypes did not retain the prior information you entered (like taxes and monitoring of tasks). Simply re-enter the data. Continue entering data on each infotype until the Action is complete. **Do not use PA30** and **individually complete** the infotypes because dynamic processes that are connected to payroll, time and benefits will fail to process (processing the Action causes the dynamic processes to occur).

Additional Resources
You can find several additional support materials about the Appointment Change Action on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/ Follow this path to access the latest version of the Appointment Change BPPs and Job Aids: *Personnel Administration > BPPs* • Appointment Change Action *Personnel Administration > Job Aids* • PA Actions Reasons Definitions

This exercise is complete.

* *

Range Revision Action

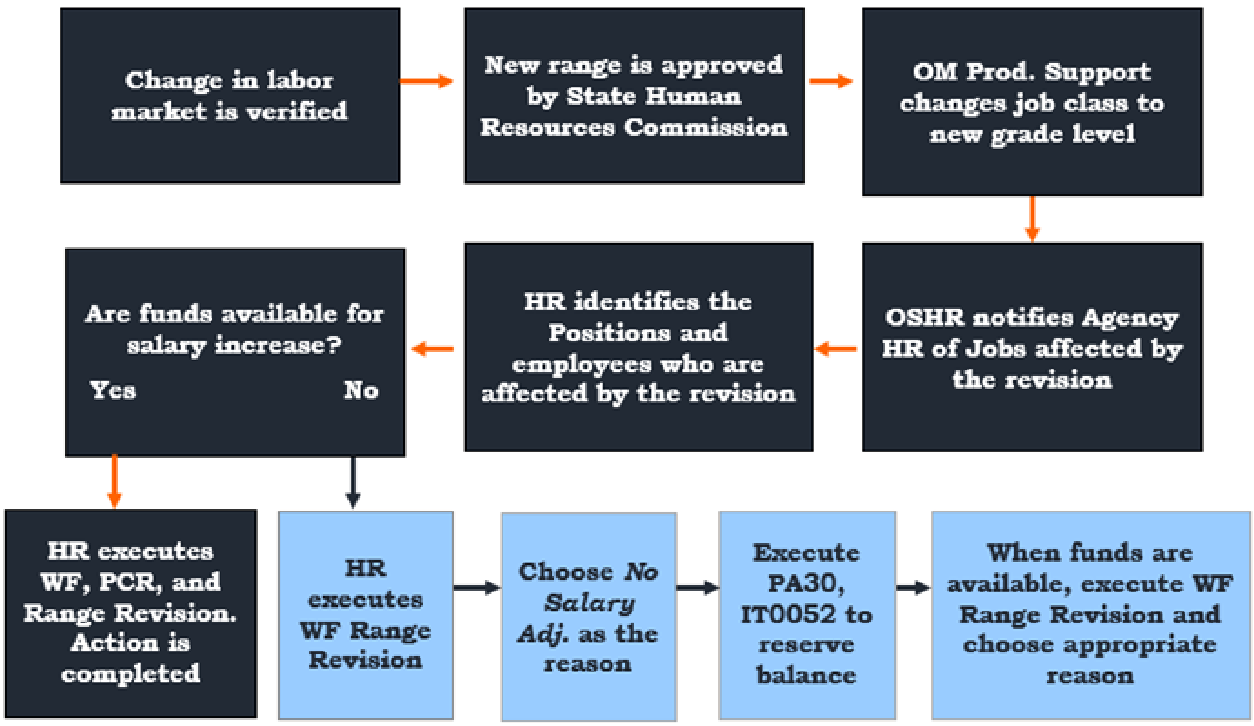


Reasons associated with the Range Revision Action	
• Labor Market (LM) Full	• Job Change Full
• Labor Market Partial	• Job Change Partial
• LM After Eff Date Complete	• Job Chg Eff Date Complete
• LM After EFF Date Retro/Min	• Job Chg Eff Date Retro/Min
• LM No Salary Adjustment	• Job Chg No Salary Adjustment

The reason, *Range Revision Partial*, is used when an employee is receiving only part of the funds. At a later date, if additional partial funds are released, you will create a new Range Revision and use partial as the reason with the new effective date, and not the date of the original Range Revision Action. Of course, if the additional released funds are for the full amount, you would use *Range Revision after Effective Date Complete* (with the current date) instead of *Range Revision Partial*.

The reason *Range Revision after Effective Date (Retro to Min)* can only be used to bring an employee up to the minimum.

Range Revision Process



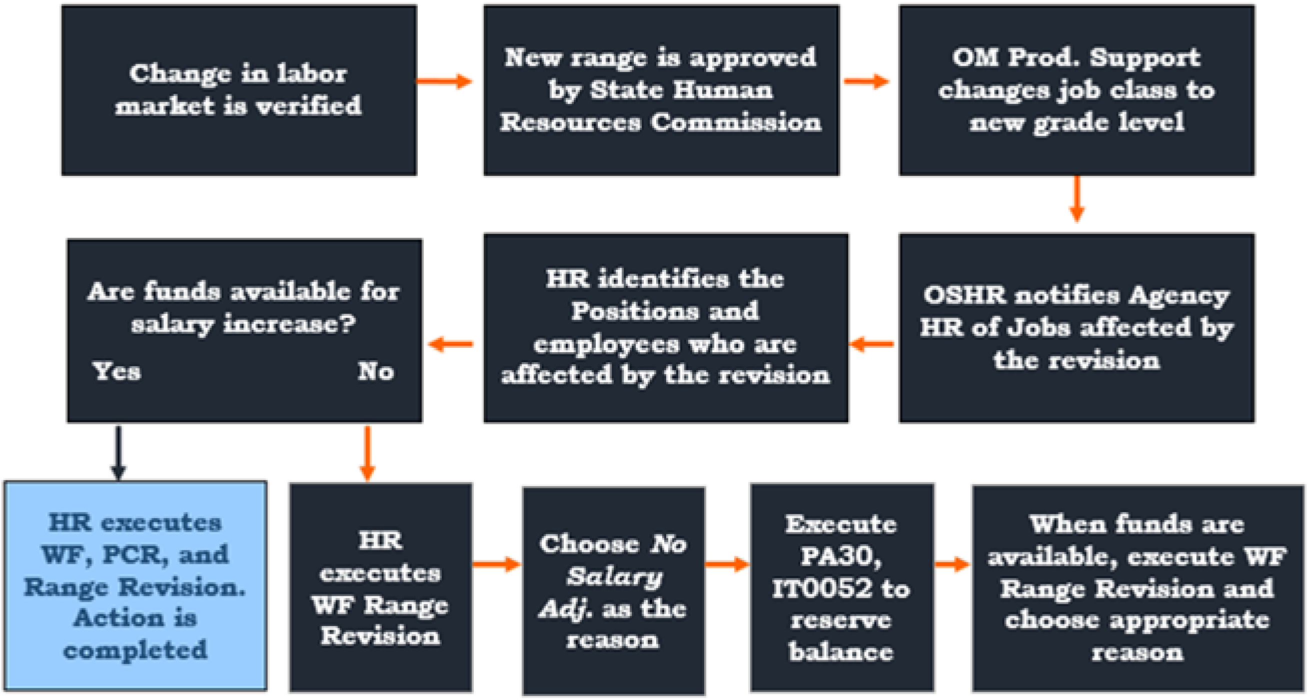
Range Revision is a change in the salary range, resulting from changes in the labor market. Any salary range change must have the approval of the State Human Resources Commission (SHRC). The revision may result in a change to the minimum and maximum, to the minimum only, or to the maximum only.

After the SHRC approves a salary range revision, OM Production Support will make changes to the Job class. This must happen before Personnel Administration can initiate the Range Revision in the HR/Payroll system.

NOTE: A change in the Job will automatically change the salary range of all Positions that are within that Job (Class).

After the Job has been updated, HR must identify the employees who are affected by the change and then initiate a Range Revision via Workflow for each employee. If funding is available, the applicable reason and salary changes are made and the Action is completed. However, if funding is not available, HR still initiates the Range Revision Action, but chooses *No Salary Adjustment* as the reason. In this case, HR must then execute additional steps to ***reserve*** the balance. This latter type of Range Revision will be discussed further in a subsequent lesson.

Range Revision - No Funds Available

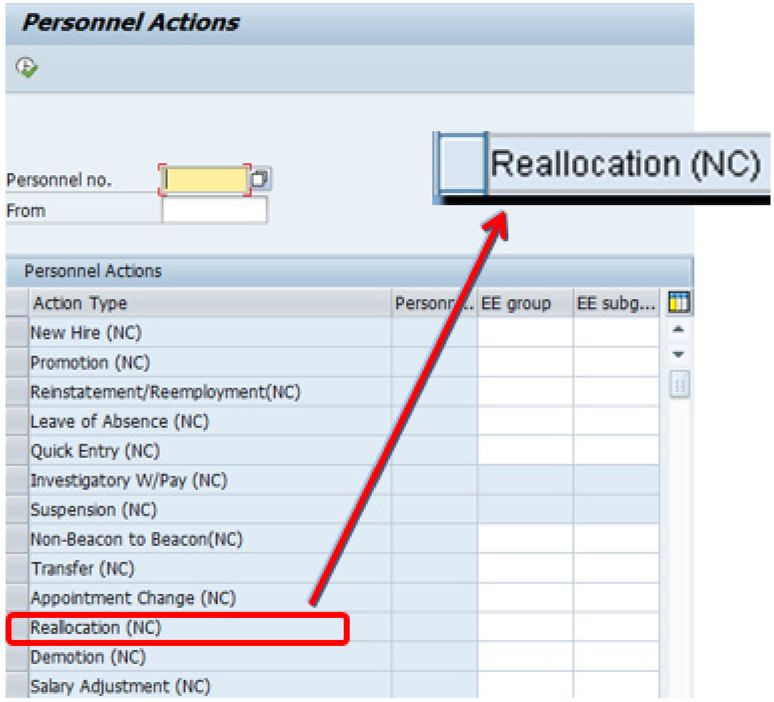


In a previous lesson, a Range Revision (RR) was processed where the funds were available to give the employee a salary increase at the time of the revision.

In this next scenario, assume that the funds were not available at the time the employee was eligible for the range revision. You will still initiate the RR Action, but choose *No Salary Adjustment* as the reason. You must then execute PA30 Maintain Master Data, IT0052-subtype 0100 Wage Maintenance to reserve the balance (enter the amount of the revision, not the entire salary). After funds become available, you will go back to RR and select the appropriate reason. Remember to verify the position information has been changed before you initiate the RR for the employee.

If later, some or all of the funds become available, you will process a series of Range Revisions and PA30s to give the funds to the employee, and reduce the amount of the balance.

Reallocation Action



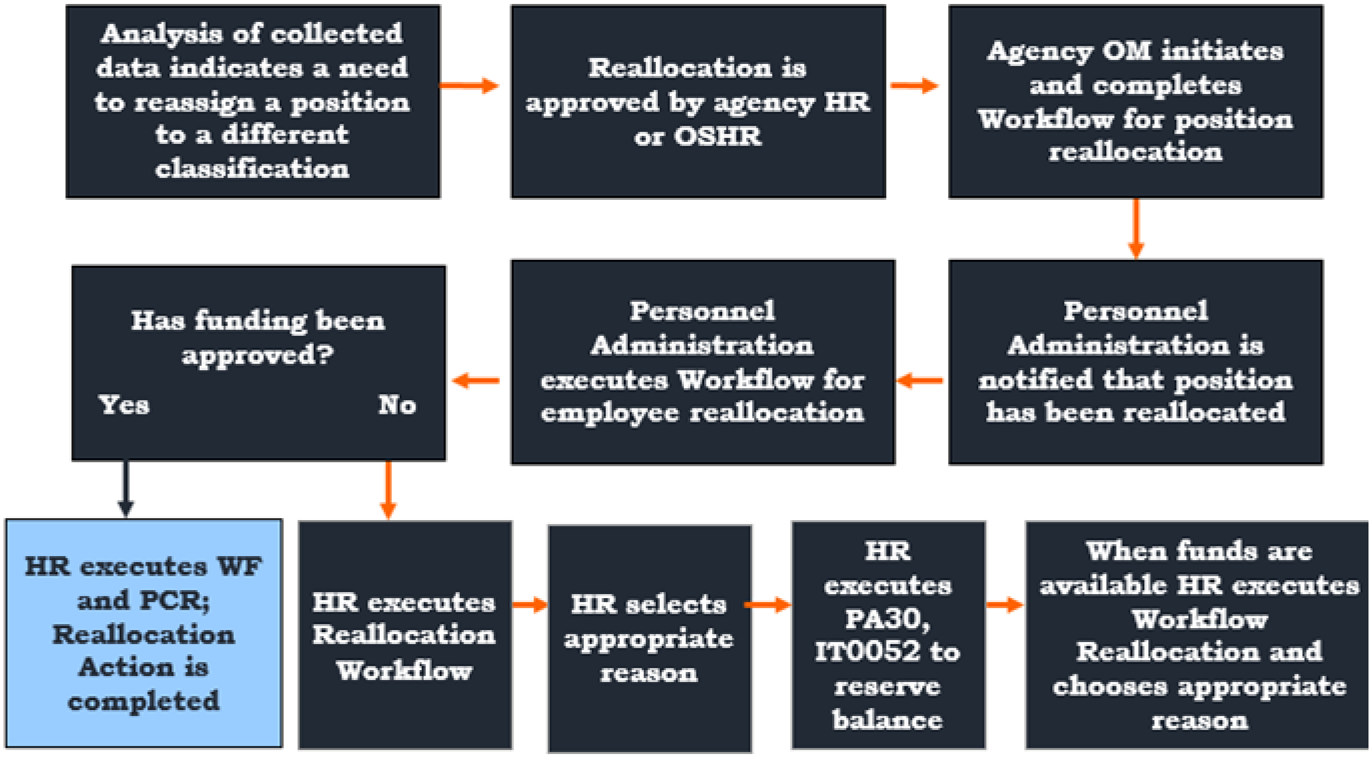
Reallocation is the assignment of a position to a different classification, documented through data collection and analysis according to customary professional procedure and approved by the agency HR or OSHR.

For purposes of the Salary Adjustment Fund, the following references are considered reallocations:

- **Reallocation** – assignment of a graded or banded position to a higher level classification to recognize higher level duties.
- **Grade-Band Transfer** – initial reallocation of graded positions to banded classes where salary increases are required to recognize higher level duties (see the *Career Banding Salary Administration Policy*).

Reasons associated with the Reallocation Action	
• Reallocation Up	• Reallocation Down
• Real Inc Partial	• Reallocation Horizontal
• Real Inc – Eff Date Comple	• Class/Pay Plan Change

Reallocation Process



There are two components to a Reallocation: OM and PA. The agency OM must first initiate Workflow to process the change to the position. This must be done before Personnel Administration initiates the Reallocation Workflow for the employee.

If funding is available HR PA initiates the Reallocation WF Action with the applicable reason, salary changes are made, and the Action is completed. If funding is ***not*** available, HR PA still initiates the Reallocation WF Action and chooses the appropriate reason for the employee. In this case, HR must then execute **PA30** Maintain Master Data (IT0052-subtype 0200 Wage Maintenance) to reserve the balance. Enter the amount of the reallocation, not the entire salary.

If later some of the funds become available, you would process a series of Reallocation WF Actions and PA30s to give the funds to the employee, and reduce the balance. For example, assume that you put $1,500 in reserve for the employee whose annual salary is $25,000. A few months later $500 of the funds are released. You would initiate the WF for the Reallocation funds release date, ***not*** the original Reallocation date. The Reallocation reason would be Real Inc Partial. On IT0008, the salary amount would be the old salary plus the *released* reserve, in this example $25,500.

The last step is to use PA30 to create IT0052-subtype 0200 Wage Maintenance and reduce the reserve balance by the amount released, in our example by $500.

EXERCISE 4.4: Reallocation

Before executing the Workflow PCR, verify the employee's current grade. Use transaction code PA20 to view the Basic Pay (IT0008) infotype. The current grade should be 62.

When processing the Reallocation Action, observe on the PCR that the employee's grade has already been changed. That change is a result of the Position change made by Agency HR. Before initiating a Reallocation, make sure that Agency HR has made the appropriate OM changes. This is critical!

SCENARIO

Emily Stafford holds an Accounting Clerk IV position. The position has been reallocated to an Accounting Clerk V. The effective date is the first of next month and the reason will be Reallocation Up.

- Her current salary is $36,500.
- She is approved for an increase to $40,150 (a 10% increase). Create the applicable Actions and transactions to indicate that Emily has the Reallocation and new salary.

Reallocation Action

There are several Actions and transactions needed to complete this scenario. First, if no funds are available, you must make an entry on the employee's record that a Reallocation was authorized, but no funds were available. Then you must put the balance of the funds in reserve. This step is necessary in case the funds are eventually released, and the employee is entitled to some or all of the reserve funds.

Instructions

Enter Reallocation on the Employee's Record

1. Verify employee's current salary (PA20, Basic Pay IT0008).
2. Initiate transaction code ZPAA076.
3. From the table below, select the Personnel number for Emily Stafford assigned to you by your instructor and enter it into the Personnel number field.

	PERSONNEL #: *Emily Stafford*						
A	80000206	F	80000211	K	80000216	P	80000221
B	80000207	G	80000212	L	80000217	Q	80000222
C	80000208	H	80000213	M	80000218	R	80000223
D	80000209	I	80000214	N	80000219	Inst 1	80000224
E	80000210	J	80000215	O	80000220	Inst 2	80000225

4. Record the Personnel number you used on your Transaction Log.
5. Click Enter.

6. Enter the following data:

Field	Value
Effective on	**First day of next month** (Record on your Transaction Log)
Action Type	**Reallocation**
Reason	**Reallocation Up**

Personnel Actions

7. When PCR is approved, execute from your Inbox to access the Personnel Actions screen.
8. Enter the **date** (the same as the PCR).
9. Select **Reallocation**.
10. Click **Execute**.
11. **Save** infotypes as applicable.
12. On the *Create Basic Pay* infotype (IT0008), enter **reason code ZA (Reallocation)**.
13. Be sure to explicitly complete Infotype creation process.

This exercise is complete.

* *

SUMMARY

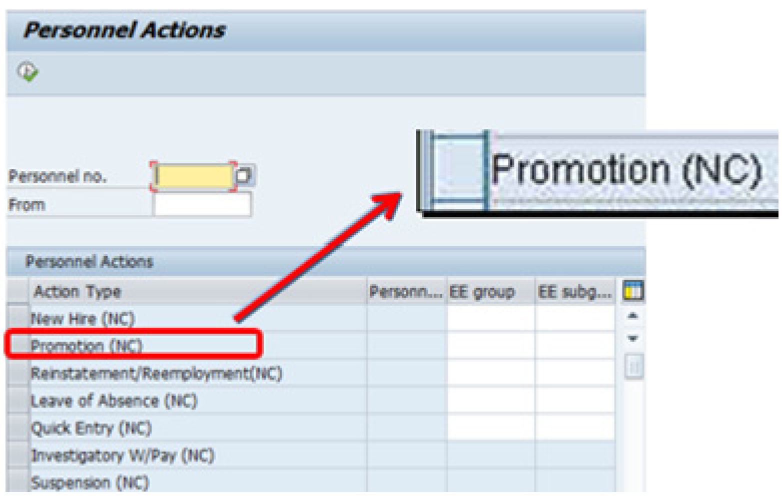
This lesson described how to distinguish between making a salary adjustment, appointment change, range revision, and a reallocation. We also learned how to identify the job adjustments that must be made prior to creating a range reivision or reallocation.

Promoting Employees

Objectives

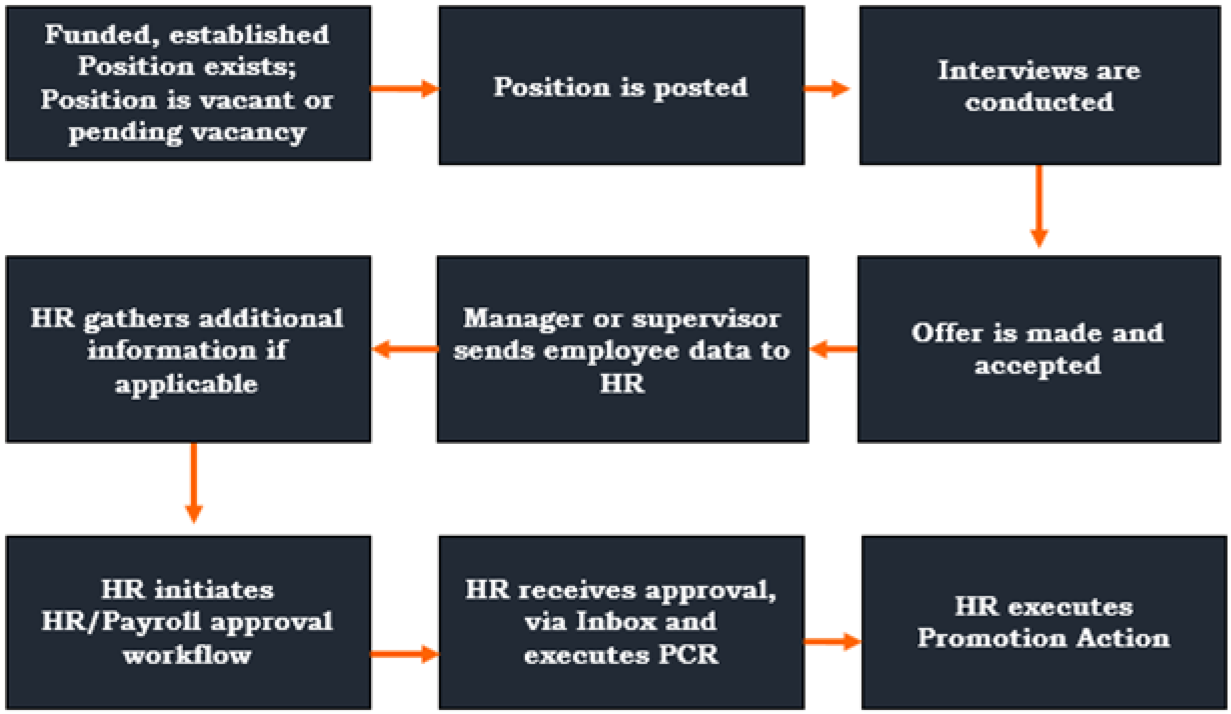
- Promote an employee.

Promotion Action



A **Promotion** is a movement to a position assigned a higher salary grade or movement between positions from one career-banded class to another with a higher journey market rate or movement from one position to another within the same banded class with a higher competency level. A promotion also results in an increase in salary, in accordance with the State Promotion Policy.

Promotion Process



Several steps must take place before a Promotion Action is executed in the HR/Payroll system.

First, a funded and established Position must exist. The Position is either vacant, or there is official notification that a vacancy is pending (for example, an employee has submitted his or her resignation).

The Position must be posted in accordance with State policy. After the posting time frame has expired, all qualified candidates are interviewed and a qualified candidate is selected. After the candidate receives and accepts the promotion offer, the Manager or Supervisor sends the employee information to HR, using a variety of distribution methods (i.e. manual form, email, phone call, fax, or other method).

HR gathers any additional information and initiates the HR/Payroll system approval workflow. After the approval is received via Inbox, HR executes the PCR and the Promotion Action.

Reasons for Promotion

- Promotion
- Promotion Inc-After Eff Date
- Acting Promotion

NOTE: Create an IT0019 via PA30 to create a reminder to cancel the Acting Pay Action at the end date of the acting pay period.

Delimiting Vacancies

During the Promotion Action process, the HR/Payroll system prompts you to select the following:

- Create a vacancy for the Position the employee held prior to being promoted. Select **Yes**.
- Delimit the vacancy on the Position to which you are promoting the employee. Select **Yes**.

Work Schedule Maintenance

You should also be aware that the work schedule will default from the Position. You should change the work schedule based on the approved schedule if it is different from the one listed. The default work schedule is based on information provided by your Agency and by OSC HR/Payroll system team members. It is important to review this work schedule for correctness, including the working hours.

* *

EXERCISE 5.1: Promotion Action

SCENARIO

The supervisor for Karla Hart is promoting her from an Informational & Communications Spec I position to an Informational & Communications Spec II position. The promotion will be effective as of the 15th of the next month. The accompanying pay increase is in accordance with State policy. Process the promotion in the HR/Payroll system.

Don't forget! You must have reinstated the Karla Hart assigned to you in a previous exercise before you can promote her.

- Before you begin, use PA20 to view the Actions infotype to make sure that the Karla Hart assigned to you indicates "Reinstated" as her last action.

Instructions

There are three parts to this Exercise:

I. Initiate Workflow

II. Wait for Approver to approve PCR

III. Complete Approved PCR

PART I - Initiate Workflow

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the *Promotion Action* BPP to complete the exercise.

1. Before you begin, use **PA20** to view the Actions infotype to make sure that the Karla Hart assigned to you indicates "Reinstated" as her last action. Following along as your instructor guides you through this process.

- Access transaction **PA20** on the SAP Easy Access screen.
- Use your **Karla Hart** from Exercise 3.3.
- In the Direct Selection field, enter **0000**.
- Select **All** in the Period section.
- Click the **Overview** button.
- Verify that the current record is a Reinstatement/Reemployment Action (you should have completed this in Exercise 3.3).
- Click the **Back** button to go back to the SAP Easy Access screen.

2. On the Easy Access screen, type **ZPAA076** in the Command field.
3. Click **Enter**. The Employee Action Request screen is displayed.
4. From the table below, select the Personnel number for Karla Hart assigned to you by your instructor and enter it into the **Personnel number** field.

	PERSONNEL #: *Karla Hart*						
A	80000125	F	80000130	K	80000135	P	80000140
B	80000126	G	80000131	L	80000136	Q	80000141
C	80000127	H	80000132	M	80000137	R	80000142
D	80000128	I	80000133	N	80000138	Inst 1	80000143
E	80000129	J	80000134	O	80000139	Inst 2	80000144

Record the Personnel number you used on the Transaction Log.

5. Click **Enter**.
6. Enter the following data:

Field	Value
Effective on	15th **day of next month** (Enter on your Transaction Log)
Action Type	Promotion
Reason	Promotion
Annual Salary	Minimum of new position's salary range

To complete Part I, use the information you learned from previous exercises to:

- Use the following Position number to complete Part I. Don't forget to record it on your Transaction Log.

	POSITION #: *Information & Communications Spec II*						
A	65002527	F	65002532	K	65002537	P	65002542
B	65002528	G	65002533	L	65002538	Q	65002543
C	65002529	H	65002534	M	65002539	R	65002544
D	65002530	I	65002535	N	65002540	Inst 1	65002545
E	65002531	J	65002536	O	65002541	Inst 2	65002546

- Save the PCR and record the PCR number and effective date of the Action. (Transaction Log)
- Write a note for the approvers.
- Initiate Workflow.

PART II - Wait for Approver to Approve the PCR

There are two approver levels: (Agency and Funding) which your instructor will perform.

PART III - Complete approved PCR

NOTE: If the PCR results in moving the employee from one payroll type to a different payroll type, you would not process the PCR. Contact BEST.

For Part III, use the information you learned from previous exercises to process the approved PCR:

- Execute the approved PCR.
- Enter the applicable date and select the Action on Personnel Actions screen.
- Process each infotype as applicable including a note on Actions and Basic Pay infotypes as appropriate:
  - — Accept delimit pop-up boxes.
  - — Don't forget to enter the Reason **(Promotion)** on IT0008.
- Explicitly complete Workflow item.

This exercise is complete.

Additional Resources
You can find several additional support materials about the Promotion Action on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/ Follow this path to access the latest version of the Promotion BPPs and Job Aids: *Personnel Administration > BPPs* • Promotion Action *Personnel Administration > Job Aids* • Promotion Action Guide • PA Actions Reasons Definitions

* *

SUMMARY

This lesson described how to promote employees.

Separating Employees

Objectives

- Distinguish between the two types of separation.
- Identify when it is appropriate to use each type of separation.
- Separate employees.

Two Types of Separation

Two Actions involve employee separation: Separation Pay Continuation and Separation. It is important to determine which Separation Action is appropriate. Before entering either type of separation, make sure that (1) time evaluation has been run (Hint: Use PA20 transaction to view the IT0003 for the employee. The PDC recalculation date represents the last time eval has been run), and (2) time balances are accurate.

Separation Pay Continuation is used only for:

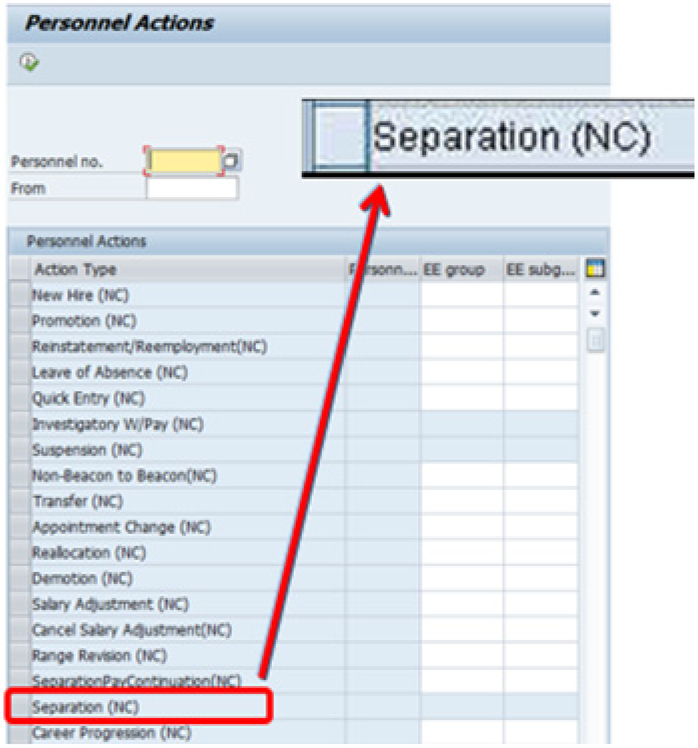
- ***Retirement*** - Law Enforcement Supplement for Law Enforcement Officers (LEOs) who retire before age 62. You will use the other Separation after age 62.
- ***Reduction-in-Force (RIF)*** – Severance and/or health insurance
- ***Separation Short-Term Disability*** – separated but still receiving STD benefits

Separation is used for all employees who do not qualify under the Separation with Pay Continuation Action.

Cost Distribution Infotype (IT0027)

The Cost Distribution infotype (IT0027) is assigned to every employee. When an employee is separated, the position defaults to 99999999; therefore no cost distribution is assigned. During both types of Separation, **save** the infotype so that it is assigned to the person. This infotype allows you to create a payout to an employee if needed after the separation. If the Cost Distribution infotype has not been saved, the payout cannot be processed. If the employee is reinstated later, the infotype will delimit in the background during the Reinstatement/Reemployment Action if processed correctly.

Separation Action



Before processing a Separation, you should ensure that all time sheets have been (1) entered, (2) approved and (3) released. If the timesheets are not up-to-date, correct, approved, and released you cannot enter the payout of leave during the Separation Action. When this happens, you will complete the Separation by-passing the leave payout infotype. When the timesheet has been run and released, you will use PA30 to create *Time Quota Compensation (IT0416)* to payout the employee's applicable leave.

NOTE: The Separation Action automatically converts the direct deposit to a check 90 days from the action effective date. It is important to ensure that the address is correct prior to entering the Separation into the HR/Payroll system.

BEST BUSINESS PROCESS: Do not create IT0416s prior to entering the Separation action. This should be created after the action is entered in the system.

Separation Effective Date

The State of North Carolina defines your effective separation date as the last day you are *still* an employee. The HR/Payroll system defines it as the first day you are no longer an employee.

On the Workflow (WF) Employee Action Request, enter the last day worked (or on payroll if retiree)--do not add a day. The HR/Payroll system automatically adds one day to the last day worked within the Action.

Examples:

1. The employee is separating for personal reasons and the last day worked is 8/25/2015. The effective date is 8/25/2015.

2. The employee is retiring effective 9/1/2015. The employee's last day worked is 8/28/2015, because he or she is exhausting vacation the remainder of the month. The effective date will be 8/31/2015. The last day worked would be 8/28/2015.

🗁 **NOTE:** If an employee gives the reason "Retirement" for Separation before they have worked half the month or they don't have or want to exhaust leave to the end of the month. You will still enter as a Separation-Retirement with the date given. This could have an effect on the employees Benefits and their health plan will terminate at the end of the current moth. Employees may be without coverage for a month(s) before the retirement health coverage begins.

After you receive the Workflow approval PCR, enter the last day worked as the effective date on the Personnel Actions screen in the HR/Payroll system. Beginning with the next screen, *IT0000-Copy Actions*, the HR/Payroll system has already added one day to the date you entered on all subsequent infotypes within the Action. **Save** the infotypes and **do not** change the dates **until** you get to infotype *0416 -Create Time Quota Compensation* (you only complete this infotype if you have leave payout). **Change** the date on that one infotype (0416) to reflect the same date as the effective date of the Action. **If you change the dates on any infotype except 0416, the employee will not receive the last day of pay.** (See example below.)

SEPARATION EFFECTIVE DATE EXAMPLE

1. Last date worked is 8/31/2015, which is entered on the WF Employee Action Request. Be sure to enter the same date in "Last Day Worked" (see previous page if retiree).

2. After receiving the Workflow approval, enter 8/31/2015 on the *Personnel Actions Screen (PA)*, select the Action and Execute.

3. *Copy Actions (IT0000)* is displayed with a date of 9/1/2015. **Do not change** the date. **Save** the infotype.

4. Enter to by-pass the delimit message, and click **Yes** to create vacancy.

5. *Copy Organizational Assignment (IT0001)* is displayed. **Do not change** the date. **Save** the infotype.

6. Change *Date Specifications (IT0041)* is displayed. **Do not change** the date. **Verify** the last day worked is accurate. Save the infotype.

7. *Create Cost Distributions (IT0027)* is displayed. **Do not change** the date. **SAVE** the infotype.

8. Infotypes for infotype *Time Quota Compensation* is displayed. Perform either (a) or (b) as described below:

   a) If no payout, close the pop-up.

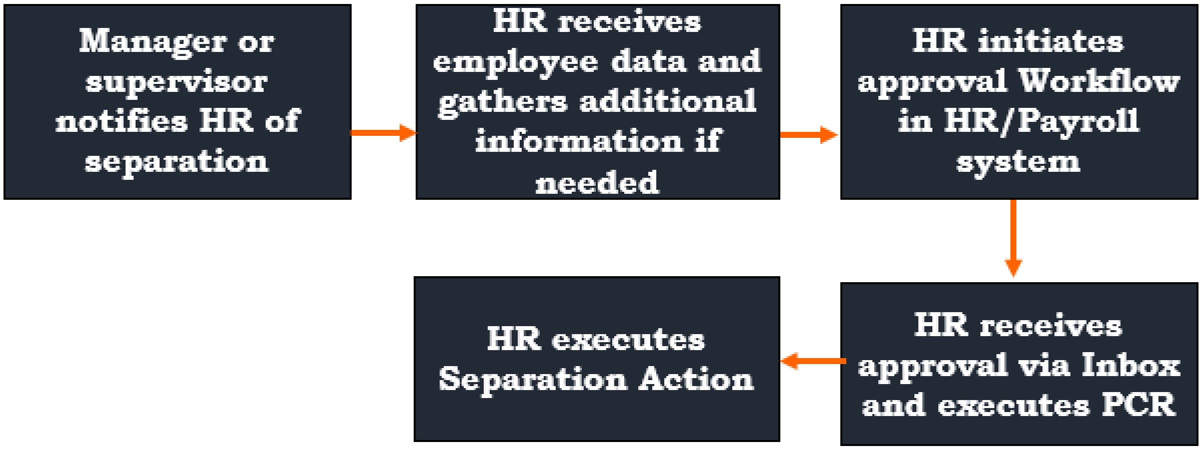
   b) If payout, **select** the appropriate subtype. Time Quota Compensation is displayed. **Change the date** to reflect the same date as the effective date of the Action (in our example, 8/31/2015). **Enter** the number of hours of payout. **Save**.

9. Delimit *Objects on Loan (0040)*. **Do not change** the date. **Delimit the applicable items** and **Save** the infotype.

10. Click the **Back** button when automatically returned to the PA screen.

11. Click the **Complete Workflow Item** button.

Separation Process



NOTE: When you use the separation reason *Beacon to Non-Beacon* (see below), the HR/Payroll system automatically stops pro-rated longevity by running the *Time Transfer Specifications (IT2012)* infotype in the background. After you separate an employee using the Beacon to Non-Beacon reason, you should use PA20 to view IT2012.

Reasons associated with the Separation Action	
• Better Employment	• Dismissed – Gross Inefficiency
• Personal Reasons	• Dismissed – Conduct
• Involuntary Separation	• Dismissed – Unsat Performance
• Did Not Report	• Prior to achieving perm status
• Voluntary Resigned W/O Notice	• Pay in lieu of notice
• RIF w/no Severance/Health Ins	• Death
• No Reason Given	• Other
• Long Term Disability	• Terminate while on FMLA
• Retirement	• Beacon to Non-Beacon Agency (pro-rate longevity will not be paid—see note on slide above)
• Retirement Disability	• Cancel Sep Pay Continuation
• Contract Ended	• Removal from Office – AOC Only
• Time-Limited Appt Term	• RIF Discontinue Service Retire
• Supplemental Appt Term	• Unavailable to work
• Appointment Ended	• 115C Dismissal
• Not Re-Elected	

EXERCISE 6.1: Separation Action

SCENARIO

Nicole Ahrens has informed you that the 15th of next month is the last day she will work. She is resigning effective that day for personal reasons and has leave that needs to be paid out.

- As you enter the Separation Action, you should remember to delimit any items on loan that the employee returned. If the employee has not returned the items on loan, but you need to process the Action in order to get him or her off payroll, you can go ahead and complete the Separation Action, but in that case, do not delimit the items on loan. You should then complete a PA30 on Monitoring of Tasks (0019) to create a reminder to retrieve the items.

OVERVIEW

When you initiate a Separation Pay Continuation, there are at least 3 aspects of the process (1) Separation Pay Continuation Action (2) PA30 Monitoring of Tasks (3) Separation Action.

Position number IT0000 - Actions

In the Separation Pay Continuation, the HR/Payroll system does not default the position to 99999999. You must manually change the position number to the default value in order for the position to show as vacant. **Do not change** the position number to 9s in Workflow. You **change** the position number to 9s **on the Actions infotype** when you process the approved PCR (Personnel Actions).

Assignment button IT0001 – Organizational Assignment

On a Separation Pay Continuation during the Action, you must use the Assignment button on IT0001 to enter the Org Unit to which the position belongs. If you fail to process this step, you will not be able to create a Separation Workflow.

Effective Date

The State of North Carolina defines your effective separation date as the last day you are still an employee. The HR/Payroll system defines it as the last day you are no longer an employee. DO NOT add a day to the Employee Action Request, nor any of the infotypes in the Personnel Action (except 0416). The HR/Payroll system automatically adds one day to the last day worked within the action.

NOTE: If an employee gives the reason “Retirement” for Separation before they have worked half the month or they don’t have or want to exhaust leave to the end of the month. You will still enter as a Separation-Retirement with the date given. This could have an effect on the employees Benefits and their health plan will terminate at the end of the current moth. Employees may be without coverage for a month(s) before the retirement health coverage begins.

Time Quota Compensation - IT0416

You must change the date on the Create Time Quota Compensation (0416) infotype to the effective date of the Action. This infotype only displays if you selected a leave payout subtype.

Quota Correction - IT2013

If the employee has over 240 hours of vacation, notify the Leave Administrator to create an Quota Correction (IT2013). If it is a RIF employee, review OSHR guidelines and make the Leave Administrator aware.

Monitoring of Tasks - IT0019

Create a PA30 Monitoring of Tasks to remind you at the end of the pay continuation to go in and initiate a regular Separation. For the following exercise (Inez Hayes), you would enter a due date that is 4 months from the Separation Pay Continuation Action to remind you to execute a regular Separation on that date. After you complete the Separation Pay Continuation, you should create a Separation action with the last day of the month of their 62^{nd} birthday as the effective date.

Cost Distribution - IT0027

The Cost Distribution infotype displays in both types of Separation Action. In each case, you save the infotype to create the existing record. This record is needed in order to process any subsequent payouts to a separated employee who is in withdrawn status.

> CAUTION!
> You should always ensure that time evaluation has been run for the employee and that the time balances to be paid out are accurate. Check to see that the last timesheet has been entered, released, and approved.

Date Specification - IT0041 (if RIF)

When the Separation Pay Continuation is due to RIF, IT0041 must be used to document when the employee was notified of the RIF.

CAUTION! You should always ensure that time evaluation has been run and that time balances to be paid out are accurate.

Use the **ZSEV Severance Pay Calculations report** for projected calculations for RIF.

Agency-Specific Deductions

HR must notify their Agency Payroll office and request them to delimit any agency-specific deductions such as parking, cell phone, etc.

Instructions

There are three parts to this Exercise:

I. Initiate Workflow

II. Wait for Approver to approve PCR

III. Complete Approved PCR

PART I - Initiate Workflow

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the *Separation Action* BPP to complete the exercise.

1. On the Easy Access screen, type **ZPAA076** in the Command field.

2. Click **Enter** . The Employee Action Request screen is displayed.

3. From the table below, select the Personnel number for Nicole Ahrens assigned to you by your instructor and enter it into the **Personnel number** field.

	PERSONNEL #: *Nicole Ahrens*						
A	80000186	F	80000191	K	80000196	P	80000201
B	80000187	G	80000192	L	80000197	Q	80000202
C	80000188	H	80000193	M	80000198	R	80000203
D	80000189	I	80000194	N	80000199	Inst 1	80000204
E	80000190	J	80000195	O	80000200	Inst 2	80000205

Don't forget to record the Personnel number you used on your Transaction Log.

4. Click **Enter** .

5. Enter the following data:

Field	Value
Effective on	**15^{th} day of next month** (Transaction Log)
Action Type	**Separation**
Reason	**Personal Reasons**

To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and record the PCR number. (Transaction Log)
- Don't forget to enter the Last Day Worked.
- Write a note for the approvers.
- Initiate Workflow.

PART II - Wait for Approver to Approve the PCR

There are two approver levels:

- Agency
- Funding

Your instructor and/or navigator will perform this part.

PART III - Complete approved PCR

For Part III, use the information you learned from previous exercises to process the approved PCR:

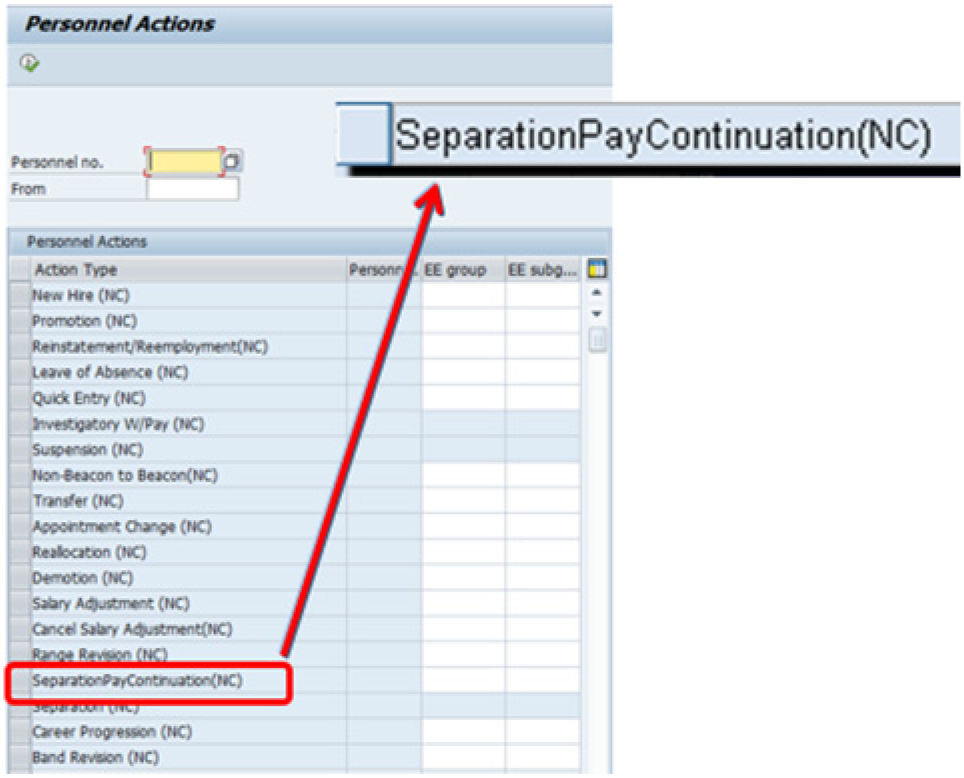
- Execute the approved PCR.
- Enter the applicable date and select the Action on Personnel Actions screen.
- Process each infotype as applicable including a note on Actions and Basic Pay infotypes as appropriate:
  - — Subtypes for infotype Time Quota compensation pop-up: select vacation payout
  - — Infotype 0416: Change the Date!
  - — Enter hours equal to those in the Rem. Column.
- Explicitly complete Workflow item.

This exercise is complete.

Additional Resources
You can find several additional support materials about the Separation Action on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/ Follow this path to access the latest version of the Separation BPPs and Job Aids: *Personnel Administration > BPPs* • Separation Action *Personnel Administration > Job Aids* • PA Actions Reasons Definitions

* *

Separation Pay Continuation



🗁 **Important!** When Separation Pay Continuation is used, the pay continuation is for a specified time frame; therefore, eventually, a “regular” Separation Action must be performed at that time.

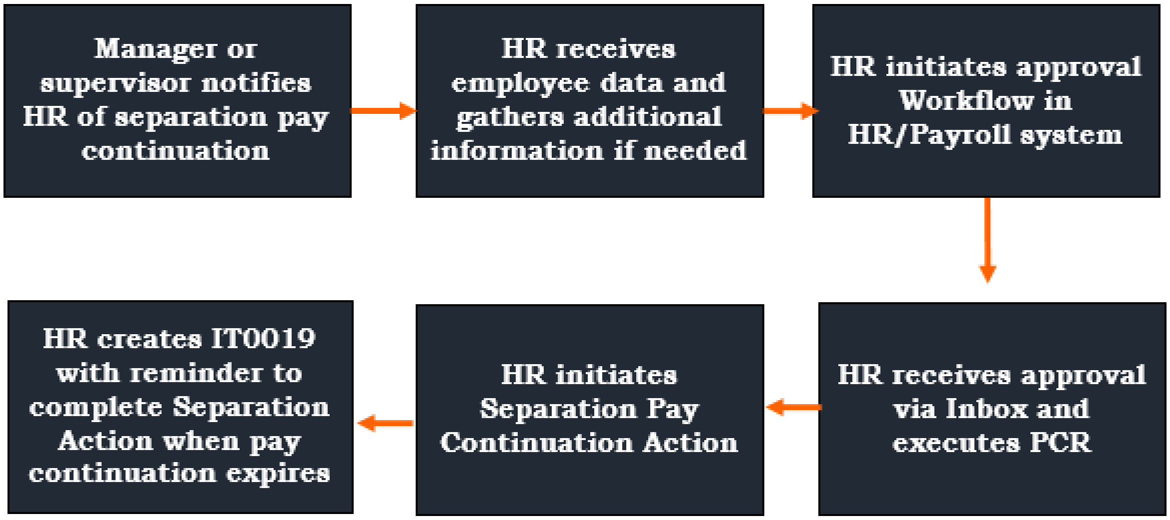
In the next exercise, you will process an Action combined with a PA30 – Maintain Employee Data.

🗁 **Important!** - When you process a Separation Pay Continuation action, there are two manual entries that are required:

— Enter **99999999** on IT0000 – Actions in the position field

— Click the **Assignment button** on IT0001 – Organizational Assignment and enter the Org Unit number of the highest level of the Organizational Unit to which you have permission or re-enter the existing org unit. Failure to perform this last step will prevent you from entering the Separation at the appropriate time.

Separation Pay Continuation Process



- Retirement (Law Enforcement Supplement who retires prior to age 62) *
- Reduction in Force Severance and/or Health Insurance
- Separation Short-Term Disability

If the employee does not meet all of these criteria, then the *Separation Action*, rather than the *Separation Pay Continuation Action*, is the appropriate one to use for the separation.

The employee must be a sworn, certified (Basic Law Enforcement Training) law enforcement officer, a participant in the Law Enforcement Retirement Program, and has served at least half of his or her time in State service in a qualified law enforcement Position.

> CAUTION!
> You **only** use the Separation Pay Continuation for qualified law enforcement officers who are retiring **prior** to their 62nd birthday. If they are retiring on or after 62, you will use the Separation Action.

In the law enforcement retirement example, the effective date is the **last day of the month of the employee's 62nd birthday**. After you complete Separation Pay Continuation, you should create a Separation action with the last day of the month of their 62nd birthday as the effective date.

> PROCESS INFORMATION:
> Create the Separation action the next business day. This allows the benefits interface to process overnight.

EXERCISE 6.2: Separation Pay Continuation Action

OVERVIEW

When you initiate a Separation Pay Continuation, there are at least 3 aspects of the process (1) Separation Pay Continuation Action (2) PA30 Monitoring of Tasks (3) Separation Action.

Position number IT0000 - Actions

In the Separation Pay Continuation, the HR/Payroll system does not default the position to 99999999. You must manually change the position number to the default value in order for the position to show as vacant. **Do not change** the position number to 9s in Workflow. You **change** the position number to 9s **on the Actions infotype** when you process the approved PCR (Personnel Actions).

Assignment button IT0001 – Organizational Assignment

On a Separation Pay Continuation during the Action, you must use the Assignment button on IT0001 to enter the Org Unit to which the position belongs. If you fail to process this step, you will not be able to create a Separation Workflow.

Effective Date

The State of North Carolina defines your effective separation date as the last day you are still an employee. The HR/Payroll system defines it as the last day you are no longer an employee. DO NOT add a day to the Employee Action Request, nor any of the infotypes in the Personnel Action (except 0416). The HR/Payroll system automatically adds one day to the last day worked within the action.

🗁 **NOTE:** If an employee gives the reason "Retirement" for Separation before they have worked half the month or they don't have or want to exhaust leave to the end of the month. You will still enter as a Separation-Retirement with the date given. This could have an effect on the employees Benefits and their health plan will terminate at the end of the current moth. Employees may be without coverage for a month(s) before the retirement health coverage begins.

Time Quota Compensation - IT0416

You must change the date on the Create Time Quota Compensation (0416) infotype to the effective date of the Action. This infotype only displays if you selected a leave payout subtype.

Quota Correction - IT2013

If the employee has over 240 hours of vacation, notify the Leave Administrator to create an Quota Correction (IT2013). If it is a RIF employee, review OSHR guidelines and make the Leave Administrator aware.

Monitoring of Tasks - IT0019

Create a PA30 Monitoring of Tasks to remind you at the end of the pay continuation to go in and initiate a regular Separation. For the following exercise (Inez Hayes), you would enter a due date that is 4 months from the Separation Pay Continuation Action to remind you to execute a regular Separation on that date. After you complete the Separation Pay Continuation, you should create a Separation action with the last day of the month of their 62nd birthday as the effective date.

Cost Distribution - IT0027

The Cost Distribution infotype displays in both types of Separation Action. In each case, you save the infotype to create the existing record. This record is needed in order to process any subsequent payouts to a separated employee who is in withdrawn status.

> CAUTION!
> You should always ensure that time evaluation has been run for the employee and that the time balances to be paid out are accurate. Check to see that the last timesheet has been entered, released, and approved.

Date Specification - IT0041 (if RIF)

When the Separation Pay Continuation is due to RIF, IT0041 must be used to document when the employee was notified of the RIF.

CAUTION! You should always ensure that time evaluation has been run and that time balances to be paid out are accurate.

Use the **ZSEV Severance Pay Calculations report** for projected calculations for RIF.

Agency-Specific Deductions

HR must notify their Agency Payroll office and request them to delimit any agency-specific deductions such as parking, cell phone, etc.

> ***SCENARIO***
>
> The department for which your employee (Inez Hayes) works is being downsized. As a result, Inez will be given severance for four months.
>
> - Inez has applicable leave that she wants to be paid out also.

Instructions

There are four parts to this Exercise:

I. Initiate Workflow

II. Wait for Approver to approve PCR

III. Process Approved PCR

IV. Complete the PA30 transaction

PART I - Initiate Workflow

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the *Separation Pay Continuation Action* BPP to complete the exercise.

1. On the Easy Access screen, type **ZPAA076** in the Command field.

2. Click **Enter** . The Employee Action Request screen is displayed.

3. From the table below, select the Personnel number for Inez Hayes assigned to you by your instructor and enter it into the **Personnel number** field.

	PERSONNEL #: *Inez Hayes*						
A	80000226	F	80000231	K	80000236	P	80000241
B	80000227	G	80000232	L	80000237	Q	80000242
C	80000228	H	80000233	M	80000238	R	80000243
D	80000229	I	80000234	N	80000239	Inst 1	80000244
E	80000230	J	80000235	O	80000240	Inst 2	80000245

Don't forget to record the Personnel number you used on your Transaction Log.

4. Click **Enter** .

5. Enter the following data:

Field	Value
Effective on	**15th day of next month** (Transaction Log)
Action Type	Separation Pay Continuation
Reason	RIF Severance and/or Health Ins

To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and record the PCR number. (Transaction Log)
- Write a note for the approvers.
- Initiate Workflow.

PART II - Wait for Approver to Approve the PCR

There are two approver levels:

- Agency
- Funding

Your instructor and/or navigator will perform this part.

PART III - Complete approved PCR

For Part III, use the information you learned from previous exercises to process the approved PCR:

- Execute the approved PCR.
- Enter the applicable date and select the Action on Personnel Actions screen.
- Process each infotype as applicable including a note on Actions and Basic Pay infotypes as appropriate:
  - Actions: **change the position number to 9s**
  - Organizational Assignment:
    - ❖ Click the **Assignment** button.
    - ❖ Click the **Organizational Unit** radio button.
    - ❖ Enter: **20010330** (for this scenario. In your work environment, enter the Org Unit to which the position belongs.
    - ❖ Click **Continue**. You are returned to IT0001. If necessary, enter 99999999 in the position number field.
    - ❖ Click **Save**.
  - Subtypes for infotype Time Quota pop-up: Select **Vacation Payout**
  - Create Time Compensation:
    - ❖ **Change the date!**
    - ❖ Enter the **number of hours** that are reflected in the Rem. Column.
- Explicitly complete Workflow item.

* *

PROCESS INFORMATION: Perform the following tasks after the Separation Pay Continuation Action:

- **For LEOs** – complete the Separation Action the next business day
- **For RIFs** – complete the Separation Action after the Health Insurance Ends (usually 12 months)
  - Coordinate with BEST Benefits before completing the action
  - Use #22 - RIF Eligibility Ends for Monitoring of Task

* *

PART IV - Complete the PA30 transaction

6. Enter transaction code **PA30** in the Command field and click **Enter**.

   🗁 **CAUTION!** If the date you enter the letter notification is the same or precedes the date of the Separation Action, the infotype will be deleted; otherwise it should delimit.

7. Select the **Employee**.

8. Select the applicable infotype for **Monitoring of Task** and complete the appropriate fields. You want this infotype as a reminder to follow up and perform the regular Separation when the severance ends in four months (remember, the effective day of the Separation for this exercise was the 15th of next month).

   Complete the following fields:

   - Task Type (RIF Eligibility Ends)
   - Date of task (date on which the task occurs)
   - Comments

Assume two days have passed (it is now the 17th of next month) and you have been informed the employee was presented with the RIF letter 30 days ago.

9. Use the down arrow to select the appropriate **task type**.
10. Enter the date the employee was notified (**30 days ago**).
11. Select **IT0041**.
12. Use the **Copy** function.
13. Change the **Start date** of the infotype to the 17th of next month.

This exercise is complete.

Additional Resources
You can find several additional support materials about the Separation Pay Continuation Action on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/ Follow this path to access the latest version of the Separation Pay Continuation BPPs and Job Aids: *Personnel Administration > BPPs* • Separation Pay Continuation Action *Personnel Administration > Job Aids* • PA Actions Reasons Definitions • Severance Pay Calculations

* *

Retirement Processing

Retirement Separations need to be completed at least 60 days prior to the retirement effective date.

- BEACON is a date-driven system and will not process any IT416 Leave Payouts until the payroll date entered.
- Additionally, benefit elections will be termed based on the date of separation, NOT the date of entry into the system.

This is to ensure Retirees that are Medicare Eligible can enroll in a Medicare Advantage Plan within the time frame allowed.

Agencies can monitor separations processing based on when the Form 6 is submitted by the employee – Employees are encouraged to submit the Form 6 at least 120 days prior to their retirement.

Employees need to be made aware that it is extremely important that they notify their Agency HR staff of their retirement, to ensure timely processing of their Insurance Benefits.

NOTE: Ensure RIF and Retirement Separations are processed as timely as possible. Late processing of a RIF or Retirement separation can result in the employee being dually enrolled in the State Health Plan. This results in billing discrepancies for the Agencies and the Insurance Vendor.

Separation Action - Retirement Reason

You should process the employee's Separation Action for Retirement Reason 60 days prior to the retirement health plan effective date in order for the active health plan to be terminated.

HR will complete the retirement actions 30-45 days prior to the retirement effective date.

> **IMPORTANT**: Employees must tell the agency at least 60 days prior to their retirement date.

See the table below for an example of an employee with an August 1st retirement date.

Employee needs to inform Agency by:	June 1, 2014
Retirement Action must be completed by:	July 1, 2014
Retirement Date	August 1, 2014
Retirement Health Plan Effective Date	September 1, 2014

Vacation Payouts

The agency can choose when to payout the vacation/bonus leaves either the last active payroll or the payroll following the retirement.

In the example dates above, July is the last active payroll for a monthly employee and if the IT0416 payouts are entered before the July payroll is finalized, the payment will occur in July.

If they are processed after OSC HR/Payroll (BEACON) finalizes the July payroll, the payouts will be paid to the employee in August.

NOTE: The effective date of the IT0416 record must be when the employee is active.

Longevity

A prorated longevity payment will be made in the July payroll since the retirement action is completed prior to the July payroll.

One-time Deferrals

If the vacation payouts are processed after the last active payroll, employees wishing to defer their longevity pay and their leave payouts to their 401K/457 Savings plans would need to submit two one-time deferral forms:

- one form for the longevity pay in July
- one form for the leave payout in August.

If the payouts are paid in the last active payroll, only a single one time deferral form is required.

Rescinding a Retirement Action

If an employee does not retire on the date entered, the action will need to be deleted. Agencies would follow the established process for deleting actions. If longevity was paid, this payment will be recouped in the next payroll and the employee will receive their longevity at their regular schedule anniversary month.

The employee's health plan and other benefit plans would need to be reinstated as an active employee.

Catching Mistakes

Review actions after entry.

BEST PRACTICE: If an issue is discovered, discuss with your BEST HR Specialist before trying to correct. Submit a ticket to BEST – BEST@osc.nc.gov or (919) 707-0707.

Run reports regularly to catch mistakes.

- B0006: Actions by Type
- Run report on Separations and Separation Pay Continuation Actions
- After report is run, pull in "Employee" and "Position" from Free Characteristics (check to make sure position number is all 9's)

SUMMARY

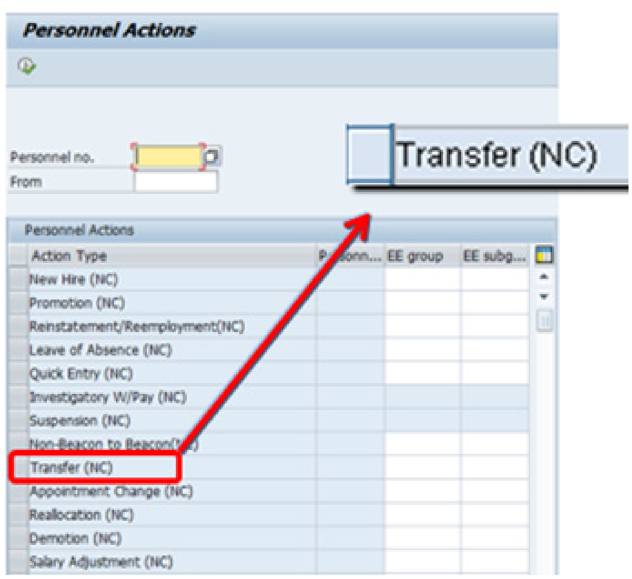
This lesson described how to distinguish between the two types of separation. We also learned how to identify when it is appropriate to use each type of separation. This lesson also explained the process to separation employees.

Entering Transfers

Objectives

- Transfer an employee within an agency.
- Transfer an employee Agency to Agency
- Transfer an employee from one HR/Payroll system agency to a different HR/Payroll system agency.
- Transfer an employee Temp to Perm or Perm to Temp

Transfer Action



Run the *BI Verify Employment Report (B0157)* to verify the employee's information.

Reasons associated with the Transfer Action	
• Agency to Agency – Lateral	• Class/Pay Plan Change
• Agency to Agency – Reassignment	• EPA-SPA
• Agency to Agency – Promotion	• Temp to Perm
• Within Agency – Lateral	• Perm to Temp
• Within Agency – Reassignment	• Within Agency Reorganization
• Grade-Band Transfer	• Agency to Agency Reorganization

Transfer Process

A Transfer Action is used to move an employee from one position to another within the present BEACON agency or between BEACON agencies <u>without a break in service</u>.

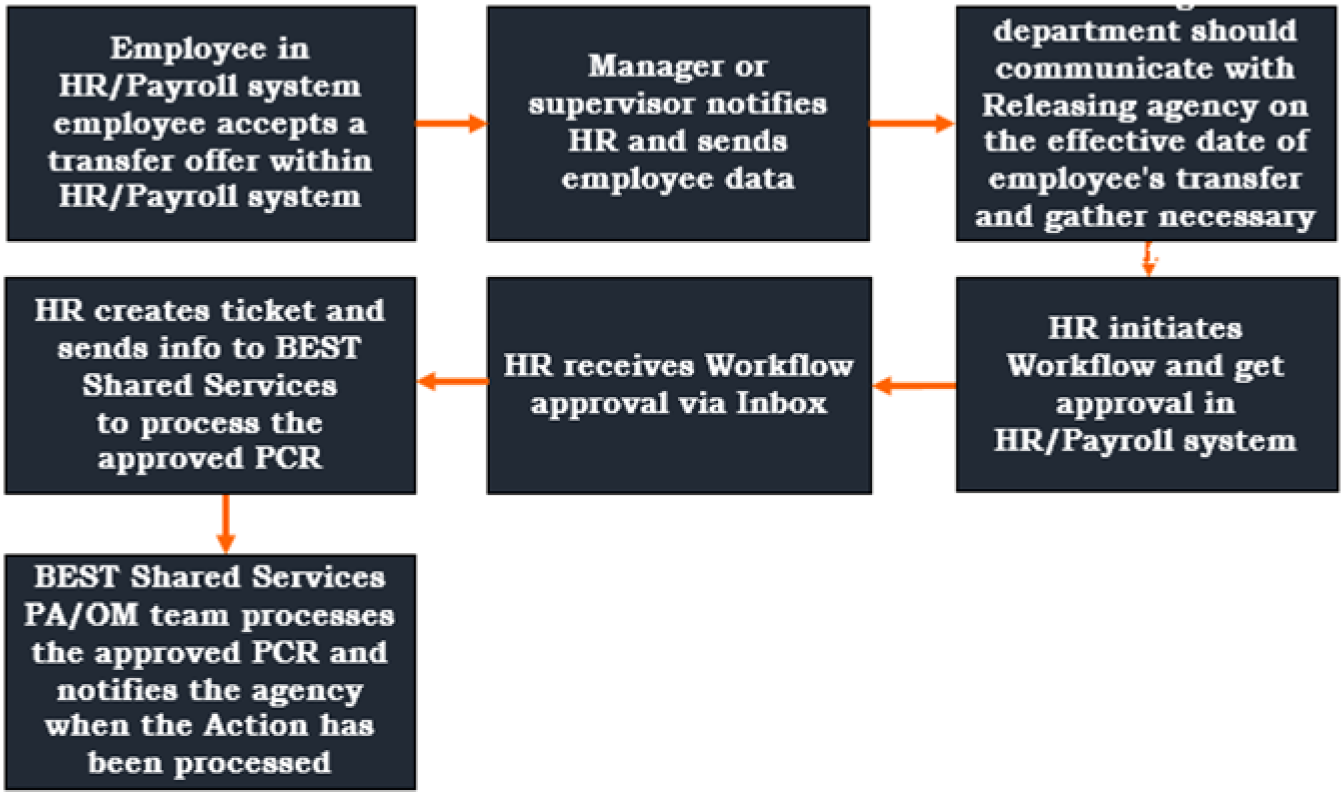
Normally a transfer between agencies results in an employee reporting to work in the Receiving agency the first workday following the last day worked at the Releasing agency. The Releasing agency does not separate the employee in the HR/Payroll system; however, the Releasing agency should delimit any items on loan that the employee returned and agency-specific items (parking). If the Releasing agency does not delimit the items on loan, the Receiving agency can delimit them at the time of transfer (assuming the employee actually returned the items).

🗁 NOTE: For Mass Transfers, call your BEST HR Specialist for information.

🗁 NOTE: Remember to contact the Releasing agency to establish the effective date of the transfer <u>prior</u> to creating the PA PCR.

🗁 NOTE: If the PCR results in moving the employee from one payroll type to a different payroll type, you will only initiate the Employee Action Request screen. When the PCR is approved and back in your inbox, you must contact BEST.

Transfer Process for Temp to Perm or Perm to Temp



Process for Temp to Perm or Perm to Temp

- Provide BEST HR with the information below to process the action via a ticket”
  - Approved PCR number
  - Planned Working Time - Work schedule, Negative or Positive time recording, Working Period [Sat (mdnt) - Fri, etc.] and Weekly working hours
  - EE's work location phone number (IT0105-Communication)

Once the action has been processed at BEST, your BEST HR Specialist will notify you by phone or email that the action has been processed. You will then need to set your PCR to complete and review/maintain the EE's infotypes/records in the system.

Additional Resources
You can find several additional support materials about the Transfer Action on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/ Follow this path to access the Transfer Checklist: *Personnel Administration > Job Aids* • Transfer Checklist

Agency to Agency Communication

The **Releasing agency** only:

- Ensures time has been entered, released and approved before time eval runs
- Delimits objects on loan (using PA30) that the employee returned and parking (if applicable)
- Verifies accuracy of leave accruals
- Discusses overtime comp with the employee (only paid if S-FLSA-OT; otherwise lost if not used within OT comp aging period).

The **Receiving agency** discusses above bullet points with the Releasing agency and reviews the *Verify Employment Report (B0157)* to verify information. The Receiving agency does not create a New Hire Action, but uses the Transfer Action with the appropriate reason.

If the transfer moves the *employee type* to a *different employee type*, you must change the Employee Subgroup. If the employee is going from one *payroll type* to a *different payroll type*, you will only initiate the PCR and when it is approved, contact BEST.

Unless the employee is assigned to a position that entitles him or her to a different retirement program, the *Receiving* Agency does not enroll the employee, since the record will transfer from the *Releasing* Agency.

Either agency can use PA20 to view the IT0003 for the employee. The PDC recalculation date represents the last time eval has been run.

* *

EXERCISE 7.1: Transfer Action - Within Agency (Lateral)

SCENARIO

Helen Stephens is an Office Assistant IV at the CR CDS MOA Deputy Director CFO organizational unit. She is making a lateral transfer to the CR CDS MOA Educational Service org unit.

- She will be transferring to a new position number and will keep her current salary as full-time, subject-FLSA employee
- The effective date is today.
- At the new division, she receives a cell phone.
- The employee will have a new work location phone number.

OVERVIEW

The **Releasing Agency** and the **Receiving Agency** should communicate prior to any entry (processing of the action) into the HR/Payroll system. This communication process is critical to ensure that the employee does not lose pay or benefits during the transfer. The Releasing Agency takes no action in the HR/Payroll system (except delimiting items the employee returned) or agency-specific benefits.

When an employee indicates he or she is leaving the agency, the agency should inquire if the employee is going to another agency. If the employee is going to another agency, the Releasing Agency does not separate the employee.

> **NOTE:**
> The Releasing Agency does not enter any actions in the HR/Payroll system because, as soon as the Receiving Agency enters the Transfer action, the employee is automatically transferred out of the Releasing Agency. Please refer to the Transfer checklist for the Releasing and Receiving agency responsibilities on the BEST Training site under the Personnel Admin folder.

Run the *Verify Employment BI Report B0157* located under the Personnel Admin tab in Reports (located in the Cross Agency Verification folder).

If you transfer an employee from one *employee type* to a *different employee type*, you must change the Employee Subgroup. If the employee is going from one payroll type to a different payroll type, you will only initiate the PCR and when it is approved, contact BEST.

Example: Monthly to bi-weekly or bi-weekly to monthly

Instructions

There are four parts to this Exercise:

I. Initiate Workflow

II. Wait for Approver to approve PCR

III. Process Approved PCR

PART I - Initiate Workflow

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the *Transfer Action* BPP to complete the exercise.

1. On the Easy Access screen, type **ZPAA076** in the Command field.

2. Click **Enter** . The Employee Action Request screen is displayed.

3. From the table below, select the Personnel number for Helen Stephens assigned to you by your instructor and enter it into the **Personnel number** field. (Transaction Log)

	PERSONNEL #: *Helen Stephens*						
A	80000346	F	80000351	K	80000356	P	80000361
B	80000347	G	80000352	L	80000357	Q	80000362
C	80000348	H	80000353	M	80000358	R	80000363
D	80000349	I	80000354	N	80000359	Inst 1	80000364
E	80000350	J	80000355	O	80000360	Inst 2	80000365

4. Click **Enter** .

5. Enter the following data:

Field	Value
Effective on	**Today's date** (Transaction Log)
Action Type	**Transfer**
Reason	**Within Agency - Lateral**

6. Click **Enter** .

7. Click **Create** . The second screen of the Employee Action Request screen is displayed.

8. From the table below, select the Position number to which you will transfer Helen Stephens. Use the student number assigned to you by your instructor and enter it into the **EE Position number** field. (Transaction Log)

	POSITION #: *Office Administrative IV*						
A	65001533	F	65001538	K	65001543	P	65001548
B	65001534	G	65001539	L	65001544	Q	65001549
C	65001535	H	65001540	M	65001545	R	65001550
D	65001536	I	65001541	N	65001546	Inst 1	65001551
E	65001537	J	65001542	O	65001547	Inst 2	65001552

9. Enter the following data:

Field	Value
EE Group/Subgroup	The Employee Group and Employee Subgroup fields are now populated. When the Position number is entered, the Employee Subgroup defaults to FT Perm (S or N FLSAOT depending upon the position). You should change as applicable for the Action. For this Exercise, **Save** the default.
Annual Salary	**Same as previous salary** (Hint: look in Current column)

10. Click **Enter**.

11. Click **Save**. The Information pop-up is displayed with the assigned PCR number.

12. Write the PCR number on the employee paperwork (in class, use your Transaction Log).

13. Click to close the pop-up.

14. Click **Services for Object**.

NOTE: The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon.

15. Select **Create > Create Note**.

16. Enter a **note title**.

17. Click in the note section and enter the applicable information to send along with the PCR. Begin the note with your name and the date.

> **NOTE**: The notes you write are only recorded in the Workflow PCR; they do not follow to the PA Action.

18. Click ✔ to close the notes. If applicable, close the notes icon menu.

19. Click **Initiate Workflow**. The Information pop-up is displayed indicating that the PCR has been submitted. (Transaction Log)

20. Click ✔ to close the Information pop-up. You are returned to the Employee Action Request (first screen).

21. You must now wait until the PCR has been approved and returned to your Inbox.

PART II - Wait for Approver to Approve the PCR

There are two approver levels:

- Agency
- Funding

Your instructor and/or navigator will perform this part.

PART III - Complete approved PCR

> **NOTE**: In this exercise, you are processing an employee who already has an existing record; therefore, each infotype will have a warning message that the previous record will be delimited. Enter to bypass the warning message. Remember to save infotypes.

22. From the Easy Access screen, click **SAP Business Workplace** .

23. Click the **node** beside **Inbox** to expand it.

24. Double-click **Workflow**. The PCRs that have been approved (or rejected) are listed in the right column.

25. Select the **PCR** you want to process.

26. Click **Execute** (or double-click the PCR line item). The system automatically takes you to the applicable screen for the Action (in this exercise, it is Personnel Actions)

27. On the Personnel Actions screen, enter:

Field	Value
From	**Today's date** (should always match the date you entered on the Employee Action Request screen)
Action Type	**Transfer**

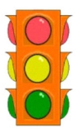
28. Click **Enter**.

29. Click **Execute**.

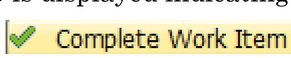
🗁 **BEST PRACTICE**: It is a best practice to always save a pre-populated infotype even if you do not make changes. In some cases, there are dynamic infotypes that display only when the previous infotype was saved. If you use the Next record button instead of saving, those dynamic infotypes will not display and the employee's record will be incomplete.

30. Complete the following fields:

Field	Value
Actions (IT0000)	
Reason for Action	Observe the field defaulted from PCR
Reference Per. No	Do not change defaulted data.
Position	Observe the field defaulted from PCR
EE Group/Subgroup	Observe the field defaulted from PCR If you forgot to make the applicable changes on the Employee Action Request screen, you can make the changes now. Be aware, however, that when an audit is run of your Actions, this will show as a discrepancy. **Enter** and **Save**
Organizational Assignment (IT0001)	**Enter** and **Save**
Create vacancy	**Yes**
Delimit vacancy	**Yes**
Date Specifications (IT0041)	Review for accuracy **Enter** and **Save**

Planned Working Time (IT0007)	It is critical that you review this infotype. The planned working time defaults based from the employee's organizational structure—company code, personnel area and subarea, cost center, business area, fund and functional area. For this exercise, accept the default. Observe that when you click Enter, the hour field automatically populates. The weekly workday field does not default. Do not enter data in the weekly workday field. **Enter** and **Save**
Possible subsequent activities	**Use the X to cancel**. Since this is a "within" Agency transfer, the employee is already enrolled in the applicable retirement from the Releasing Agency.
Basic Pay (IT0008) 	Reason: **Transfer** Observe that Salary populated from PCR. **Enter** and **Save**
Unemployment State (IT0209)	**Enter** and **Save**
Objects on loan (IT0040)	If the employee returned the items and the Releasing Agency did not delimit the objects, the infotype will display with the item and the end date of 12/31/9999. In that case, you can either enter your item and complete a PA30 to delimit the Releasing Agency's item, or alternatively, you can delimit the Releasing Agency's item in the Action and do a PA30 to add your item. It doesn't matter as long as you remember to do both if needed. In this case, assume that the employee did not return the item on loan to the previous Agency. However, you are going to enter the cell phone and use PA30 to delimit the ID later. Object on loan field: Use the down arrow to select the **cell phone option**. Number/unit: **1 pieces** Loan object #: **BR549**

31. Click the **Back** button at the Personnel Actions screen (the system automatically returns you to Personnel Actions when you finish the last infotype within the Action).

32. The pop-up is displayed indicating that the item must be explicitly completed. Click **Complete Work Item** 

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> **CRITICAL NOTE:** It is critical that you complete this last step.

PART IV - Access PA30 to complete infotype processing

When the Releasing Agency notifies you that the employee has returned the item issued to the employee, follow the steps below to delimit the item (you will not perform these steps in class):

Transaction: PA30	• Enter the **personnel number** on the *Maintain HR Master Data* screen. • In the **Direct selection** section and in the **Infotype** field, enter **0040**. • Choose the **applicable subtype** from the matchcode list in the **Sty** field for State ID. • Click the **Delimit** button. • Enter the **delimit date** in the pop-up. If the pop-up did not display, enter the delimit date in the Delimit Date field. • Click the **green check** to close the delimit date notice. • Select the **line item** that contains the items that were issued by the Releasing Agency. • Click the **Delimit** button.
Transaction: PA30	You will still be on the *Maintain HR Master Data* screen. Perform the following data entry processes: • *Direct selection* and in the *Infotype* field, enter **0105** and then choose the **0020** subtype. • Select **Create**. • In the Start field enter the **effective date of the action**. • Enter the new **telephone number**. • Click the **green check**. • Save.

This exercise is complete.

Additional Resources
You can find several additional support materials about the Transfer Action on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/ Follow this path to access the latest version of the Transfer BPPs and Job Aids: *Personnel Administration > BPPs* • Transfer Action *Personnel Administration > Job Aids* • PA Actions Reasons Definitions • Transfer Action Guide • Transfer Process Checklist

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EXERCISE 7.2: Transfer Action - Agency to Agency (Promotion)

SCENARIO

Marsha Sanders is being promoted from Facility Survey Consultant I at DHHS to a Facility Planner III at the CR CDS Capital Projects Unit Org unit and will be transferred into a new position number with the new agency. Her new salary will be the minimum of the salary range for the new position.

- The effective date is today.
- She returned the objects on loan to the Releasing Agency, but the HR Master Data Maintainer there failed to delimit the infotype 0040 - Objects on Loan.
- The employee's work schedule will be as follows:
    - ❖ D01N08GN work schedule rule
    - ❖ Positive Time Recording
    - ❖ Working period will be Wk – Wed (mdnt) - Tues
    - ❖ 40 hrs. a week
- In addition, your agency (the Receiving agency) issued Marsha a cell phone.

Be sure to read the information in the previous exercise about processing Transfer Actions.

Instructions

There are four parts to this Exercise:

I. Initiate Workflow

II. Wait for Approver to approve PCR

III. Process Approved PCR

PART I - Initiate Workflow

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the *Transfer Action* BPP to complete the exercise.

1. Assume you have already run the *Verify Employment Report BI B0157* and found the employee in the Releasing Agency; assume you also used PPOSE or PO13 and to verify that the position is vacant.

2. On the Easy Access screen, type **ZPAA076** in the Command field.

3. Click **Enter** ✅. The Employee Action Request screen is displayed.

4. From the table below, select the Personnel number for Marsha Sanders assigned to you by your instructor and enter it into the **Personnel number** field. (Transaction Log)

	PERSONNEL #: *Marsha Sanders*						
A	80001163	F	80001168	K	80001173	P	80001178
B	80001164	G	80001169	L	80001174	Q	80001179
C	80001165	H	80001170	M	80001175	R	80001180
D	80001166	I	80001171	N	80001176	Inst 1	80001181
E	80001167	J	80001172	O	80001177	Inst 2	80001182

5. Click **Enter** ✅.

6. Enter the following data:

Field	Value
Effective on	**Today's date** (Transaction Log)
Action Type	**Transfer**
Reason	**Agency to Agency - Promotion**

7. Click **Enter** ✅.

8. Click **Create** 🗋. The second screen of the Employee Action Request screen is displayed.

9. From the table below, select the Position number to which you will transfer Marsha Sanders. Use the student number assigned to you by your instructor and enter it into the **EE Position number** field. (Transaction Log)

	POSITION #: ***Facility Planner III***						
A	65001654	F	65001659	K	65001664	P	65001669
B	65001655	G	65001660	L	65001665	Q	65001670
C	65001656	H	65001661	M	65001666	R	65001671
D	65001657	I	65001662	N	65001667	Inst 1	65001672
E	65001658	J	65001663	O	65001668	Inst 2	65001673

10. Enter the following data:

Field	Value
Annual Salary	The **minimum** of the salary range for the new position.

11. Click **Enter**.

12. Click **Save**. The Information pop-up is displayed with the assigned PCR number.

13. Write the PCR number on the employee paperwork (in class, use your Transaction Log).

14. Click  to close the pop-up.

15. Click **Services for Object**.

> **NOTE**: The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon.

16. Select **Create > Create Note**.

17. Enter a **note title**.

18. Click in the note section and enter the applicable information to send along with the PCR. Begin the note with your name and the date.

> **NOTE**: The notes you write are only recorded in the Workflow PCR; they do not follow to the PA Action.

19. Click the green check  to close the notes. If applicable, close the notes icon menu.

20. Click **Initiate Workflow**. The Information pop-up is displayed indicating that the PCR has been submitted.

21. Click the green check  to close the Information pop-up. You are returned to the Employee Action Request (first screen).

22. You must now wait until the PCR has been approved and returned to your Inbox.

PART II - Wait for Approver to Approve the PCR

There are two approver levels:

- Agency
- Funding

Your instructor and/or navigator will perform this part.

PART III - Process approved PCR

🗁 **NOTE**: In this exercise, you are processing an employee who already has an existing record; therefore, each infotype will have a warning message that the previous record will be delimited. Enter to bypass the warning message. Remember to save infotypes.

23. From the Easy Access screen, click **SAP Business Workplace** .
24. Click the **node** beside **Inbox** to expand it.
25. Double-click **Workflow**. The PCRs that have been approved (or rejected) are listed in the right column.
26. Select the **PCR** you want to process.
27. Click **Execute** (or double-click the PCR line item). The system automatically takes you to the applicable screen for the Action (in this exercise, it is Personnel Actions.)
28. On the Personnel Actions screen, enter:

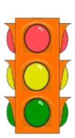
Field	Value
From	**Today's date** (should always match the date you entered on the Employee Action Request screen)
Action Type	**Transfer**

29. Click **Enter**.
30. Click **Execute**.

🗁 **BEST PRACTICE**: It is a best practice to always save a pre-populated infotype even if you do not make changes. In some cases, there are dynamic infotypes that display only when the previous infotype was saved. If you use the Next record button instead of saving, those dynamic infotypes will not display and the employee's record will be incomplete.

31. Complete the following fields:

Field	Value
Actions (IT0000)	
Reason for Action	Observe the field defaulted from PCR
Position	Observe the field defaulted from PCR

EE Group/Subgroup	Observe the field defaulted from PCR If you forgot to make the applicable changes on the Employee Action Request screen, you can make the changes now. Be aware, however, that when an audit is run of your Actions, this will show as a discrepancy. **Enter** and **Save**
Organizational Assignment (IT0001)	**Enter** and **Save**
Create vacancy	**Yes**
Delimit vacancy	**Yes**
Date Specifications (IT0041)	Agency date should be pre-populated. **Enter** and **Save**
Planned Working Time (IT0007)	It is critical that you review this infotype. The planned working time defaults based from the employee's organizational structure—company code, personnel area and subarea, cost center, business area, fund and functional area. For this exercise, you will change the planned working time based on the info given from the scenario. You will need to change the **Work schedule rule** (WSR), the **Time Mgmt** status will default from the position and you will need to change the **Working Period** and the **Weekly working hours** will default from the position. The start date of the IT0007 will automatically default to the effective date of the action. • Enter applicable the Work Schedule Rule by entering the WSR or selecting the drop-down tool for the WSR. • Positive Time will automatically default from the position for this exercise. • Select the applicable Working Period from the drop down tool. • 40 hrs. will automatically default in the Weekly working hours field based on the position. **Enter** and **Save**
Possible subsequent activities	Use the X to cancel. The employee is already enrolled in the applicable retirement from the Releasing Agency.
Basic Pay (IT0008) 	**Reason**: Transfer Observe that Salary populated from PCR. **Enter** and **Save**
Unemployment State (IT0209)	**Enter** and **Save**

Objects on Loan (IT0040)	If the employee returned the items and the Releasing Agency did not delimit the objects, the infotype will display with the item and the end date of 12/31/9999. In that case, you can either enter your item and complete a PA30 to delimit the Releasing Agency's item, or alternatively, you an delimit the Releasing Agency's item in the Action and do a PA30 to add your item. It doesn't matter as long as you remember to do both if needed. For this exercise you will: **Object on loan** field: Use the down arrow to select the **cell phone** option. **Number/unit**: 1 pieces **Loan object #**: 919-584-1212

32. When you have completed the last infotype in the series, the HR/Payroll system automatically returns you to the List Actions infotype screen.

33. Click the **Back** button at the Personnel Actions screen (the system automatically returns you to Personnel Actions when you finish the last infotype within the Action).

34. The pop-up is displayed indicating that the item must be explicitly completed. Click **Complete Work Item** Complete Work Item.

CRITICAL NOTE: It is critical that you complete this last step.

When the Releasing Agency notifies you that the employee has returned the item issued to the employee, follow the steps below to delimit the item (you will not perform these steps in class):

35. Click **Back** to return to the Maintain HR Master Data (PA30) screen.

36. Use the **Overview** function to see both items on loan. You should see the item(s) from the Releasing Agency is still active and the cell phone has been added with an end date of 12/31/9999.

Transaction: PA30	• Enter the **personnel number** on the *Maintain HR Master Data* screen. • In the **Direct selection** section and in the **Infotype** field, enter **0040**. • Choose the **applicable subtype** from the matchcode list in the **Sty** field for items on loan. • Click the **Delimit** button. • Enter the **delimit date** in the pop-up. If the pop-up did not display, enter the delimit date in the Delimit Date field. • Click the **green check** to close the delimit date notice. • Select the **line item** that contains the items that were issued by the Releasing Agency. • Click the **Delimit** button.

This exercise is complete.

* *

SUMMARY

This lesson described how to transfer an employee within an agency. We also learned how to transfer an employee from one HR/Payroll system agency to a different HR/Payroll system agency.

Workflow Process & Inquiry

Objectives

- Explain the purpose of Workflow
- Define key Workflow terms
- Describe the PA Personnel Workflow process
- Discuss the routing and processing of PA Workflow PCRs
- Understand the purpose of the PCR# and the PCR date
- Identify how to troubleshoot PCRs
- Execute the Workflow Report
    - Access and execute the Workflow Report for PA
    - Change the layout of the report
    - Create a variant for the report
    - Retrieve a report variant

Purpose of Workflow

Workflow provides an electronic approval process for Employee Actions at various levels:

- Division/Agency
- Funding
- OSHR

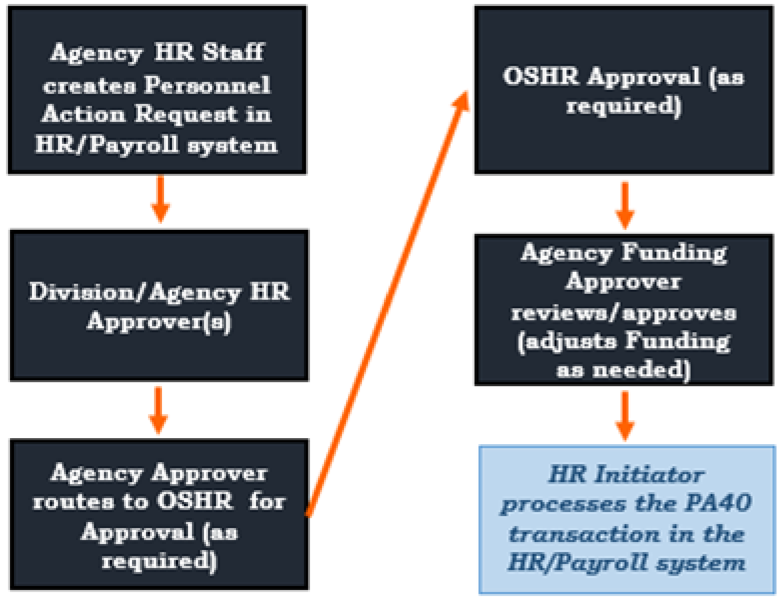
Workflow also gives users the ability to create, track and approve Workflow items.

Key Terms

- **Action**: This term is used in PA to indicate a new record or change to an existing employee or the position employee is in.
- **Documents**: A documents option is contained in both the Inbox and Outbox. Documents are the HR/Payroll system's way of tracking all transactions that take place within the system. You will not use documents very often.
- **Initiator**: The PA user who enters the data for a PA Action. In PA, the Initiator will ultimately enter the data for the Action into the employee's HR/Payroll personnel record after final approval.
- **Routing Tables**: PA has a custom table created for the State of North Carolina within OSC HR/Payroll system to hold the list of actions/reasons and logic to support the approval process for employee. The table identifies which Action/Reason goes to which approval route.
- **PCR**: A Personnel Change Request (PCR) is a number assigned to each Workflow item. The PCR can be used to identify and track a Workflow item.
- **Workflow Tracker**: A link that will show you the name of the Step, Status, Result, Time & Agent for each Workflow item. The Workflow Tracker shows who initiated, who approved, and who the next approvers are in the process.
- **Workflow Header**: Displays the data that was entered by the Initiator for the Workflow item. The Workflow Header answers this question, "What data was used to execute this Workflow item?".
- **Workflow Log**: A more detailed view of the individual steps the document goes through within the Workflow process (detailed Workflow Tracker). The Workflow Log answers the question, "Who has the Workflow item in his/her inbox?".
- **Approver**: Several positions are assigned with approval status at various levels within the organization. The security access assigned to the position determines if the position holder has approval authority for PA. The authority to approve belongs to the position, not the person holding the position. When the person leaves the position, he or she will no longer have approval authority unless the new position has the authority.

  Generally, there are at least two Approvers assigned to each level in an agency or division so that when the Initiator executes Workflow, the PCR is sent to the Inbox of all of the Approvers at that level. This allows the approval process to continue if one of the Approvers is out of the office for a period of time.

PA Workflow Process Flow



The PA action is not complete until the PCR has been approved and processed by the Initiator. The Workflow PCR is simply a form to collect some of the basic information for approval purposes before the Personnel Action is processed (and the employee's personnel file is updated). When the approval process is complete, the Initiator receives the PCR back in his or her Inbox. The Initiator executes the PCR from the Inbox and the OSC HR/Payroll system automatically takes the initiator to the appropriate screen (Hiring for New Hires and Non-Beacon to Beacon; Personnel Actions for all others). The Initiator reviews the data that defaulted and saves all applicable infotypes (the system has bundled all of the appropriate infotypes that require attention for the Action). After all infotypes have been completed, the Initiator receives the "Complete Workflow Item" button. It is important that only when the PA Action has been completely processed should the initiator mark the PCR workflow item as complete.

If the PCR is marked complete prior to the Action being completely processed in the system, the Initiator must use transaction code PA40 to re-executes the Action and enter data and/or save as applicable every infotype appropriate for that Action.

NOTE: There are only a few fields that the Initiator will need to enter data.

Additional Resources
You can find several additional support materials about Workflow buttons and functions on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/index.html Follow the following path to access the latest version of the job aids: *Personnel Administration > Job Aids* • Business Workplace Button Functions • Business Workplace Overview Tree Functions

HR/Payroll System Workflow Process

PA WORKFLOW PROCESS
• Notes and documents should be included/attached in the Services for Objects section of the PCR
• Agency funding approval is last approval level for PA PCRs
• PCR #s begin with 1 (1000000000)
• PCR returns to Initiator to explicitly complete the Workflow after processing action
• After the PCR has been through the entire approval process it returns to **initiator** to work the action and explicitly complete WF.

Services for Objects

The Services for Objects option allows notes and attachments (Word, Excel, Notepad) to be included with the Workflow PCR. All Approvers at the next levels (unless marked private) can view the notes or attachments. Only the creator of the private note can view it.

PA Workflow Process

The Initiator (Agency) initiates the PCR (Personnel Change Request) and completes the final step after the PCR has been through the entire approval process.

The Agency Funding Approver is usually the last approval step for most PA PCRs.

Workflow Approver Relationships

The list below shows the different levels that an OM or PA Action may be sent for approval. The PA Routing Table was set up to determine how the PCR is routed. You will see the following code acronyms when viewing the Workflow Tracker.

PA Workflow Approver Relationships
DA1 - Division Approver
AA1 - Agency Approver
OA1 - OSHR Approver
FA1 - Funding Approver

Workflow - In Process

After an Initiator initiates Workflow, the status is updated to **N** for in process.

After an Approver approves the PCR, the status is set to **A** for approved and will remain at A for all approval levels unless an Approver returns (rejects), reserves, or cancels the PCR.

When an Approver returns (rejects) a PCR, the status is changed to **R** for rejected. The PCR is automatically sent back to the Inbox of the Initiator.

If the initiator cancels the action, the Workflow status will change to **C** for canceled.

PCR Troubleshooting

There are several reasons why a PCR may appear to be "lost." It is best practice to record the PCR number, date and position number (if applicable) to track a PCR later in case it is "lost."

1. If the Initiator merely saved the PCR and did not click the Initiate Workflow button, the PCR is not visible in their outbox. Therefore an Approver who is waiting to see the PCR in the Approver Inbox will not be able to see it in their inbox. The Initiator may choose Edit in the ZPAA076 - Employee Action Request transaction.

2. The Initiator or Approver has incorrect security roles to process a PCR.

3. If a user is an Initiator as well as an Approver, it can sometimes be confusing. That is because the same PCR will leave the Inbox of the Initiator role and be sent to the Inbox of the Approver role (which to the employee is the same Inbox).

4. In PA, the Initiator has to click a "Completed Workflow Item" button when the personnel action has been processed. In some cases, the Initiator may have inadvertently clicked the button prematurely after backing out of an Action without processing all infotypes. When the initiator has dual approval roles, please allow the system a few minutes to maneuver through the security chain and the PCR will come back in your inbox as scheduled.

5. If a PCR/workflow item is "touched" more than 20 times or too quickly by an approver, it can disappear from the workflow process automatically. Contact BEST Shared Services to confirm. A new PCR may need to be created.

KNOWLEDGE CHECK

Answer	Question
	1. The ___ is the PA user who enters the data for a PA Action.
	2. The ___ shows who initiated, who approved and who the next approvers are in the process.
	3. The ___ answers the question "Who has the Workflow item in their inbox?".
	4. The ___ can be used to identify and track a Workflow item.
	5. Workflow approval security is assigned to the ___.
	6. The Funding approver's place in the Workflow process in PA is usually ___.
	7. In PA, the Initiator has to click the ___ button when the action has been completed.
	8. When you use the ___ function, you should be sure to use a new effective date.

* *

EXERCISE 8.1: Workflow Overview and Navigation

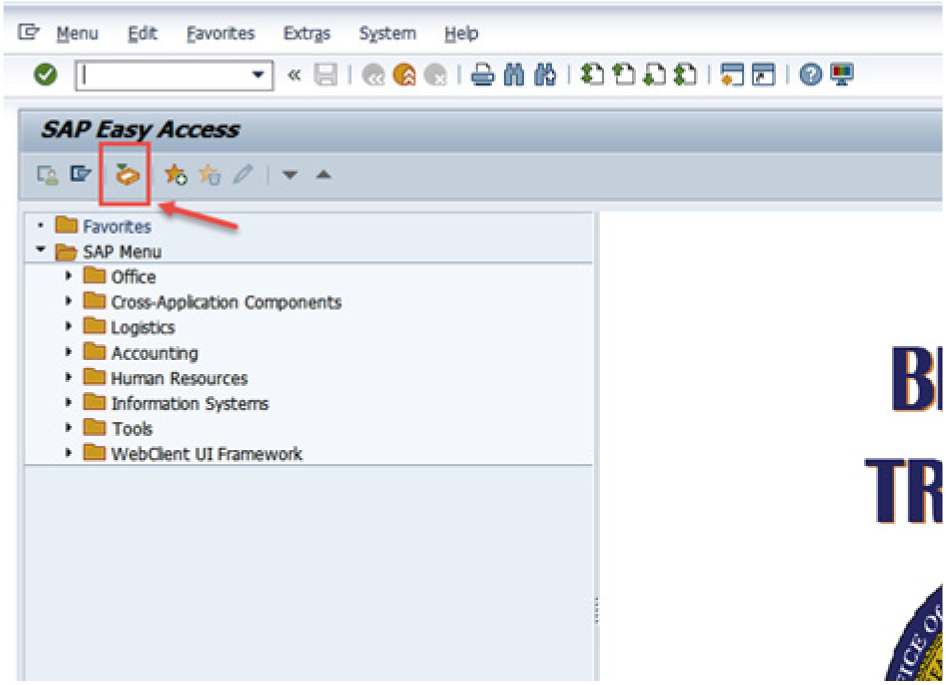
SCENARIO

Follow with your instructor as he/she directs you through the navigation and discovery of the Workflow Outbox.

Instructions

You are currently on the SAP Easy Access screen.

Accessing the Workflow Inbox (SBWP)



An Initiator accesses the Workflow PCRs that have been sent for him or her to take Action on via the Workflow option in the Inbox.

The Inbox is accessed either from the Easy Access screen using the Business Workplace button or by entering SBWP in the Command field.

9. Click the **SBWP** button to access the SAP Business Workplace.

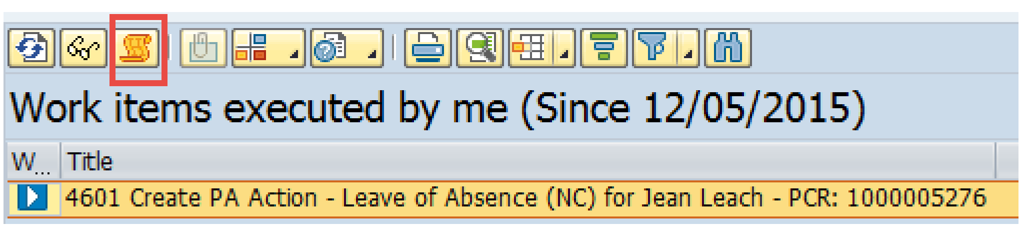
10. Click the node in front of **Outbox** Outbox .

11. Click the **Work items executed by me** folder.

12. Pull out your Transaction log and locate the PCR number for Exercise 4.3.

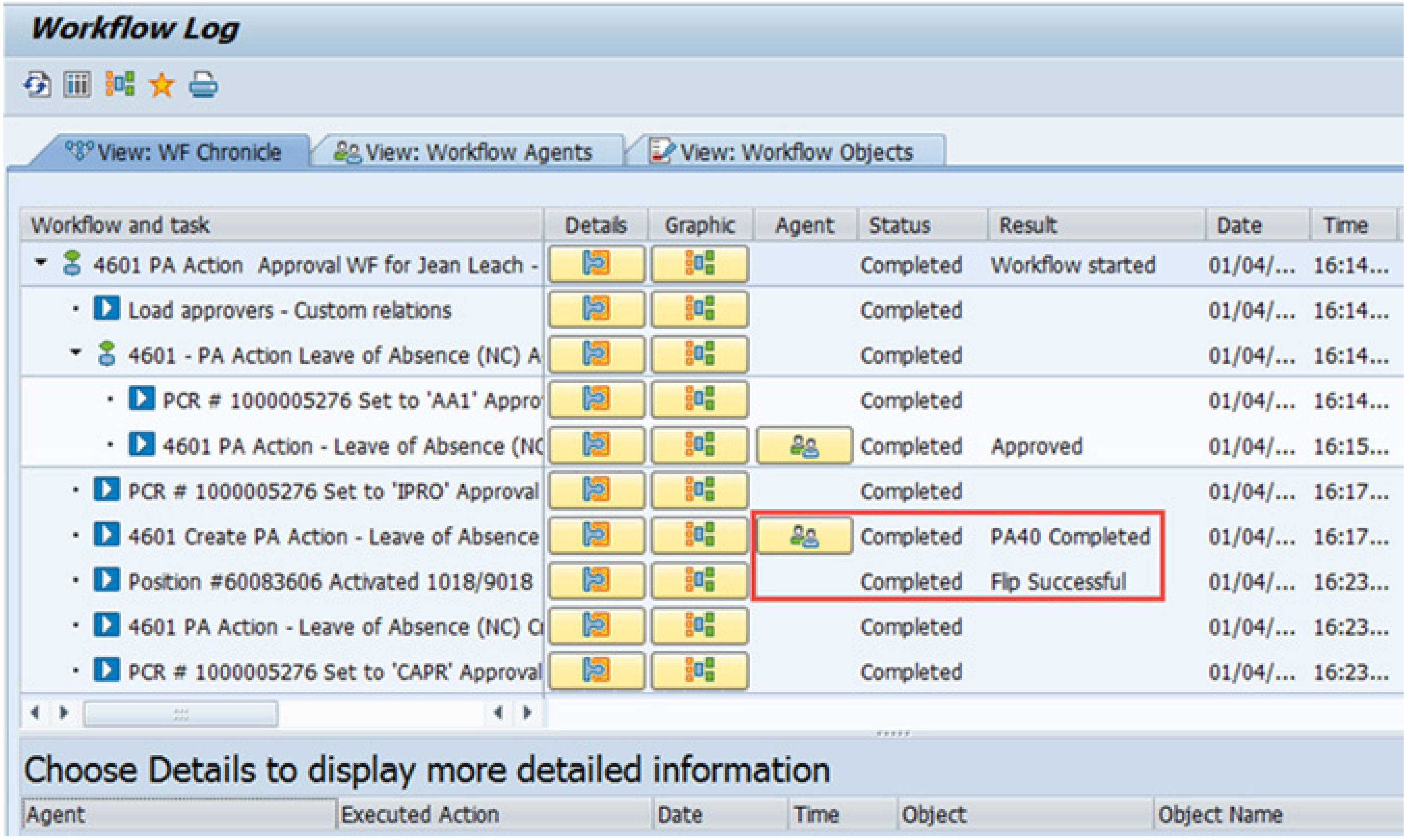
13. Look through the PCRs in your Outbox and find the one for Range Revision (Rose Brown).

    Follow your instructor as he/she shows you how to use the **Find** button to locate your PCR.



14. If the PCR for the Range Revision for Rose Brown is not selected, SINGLE-click on it to select it.

15. Click on the **Workflow Log** button on the menu to display the workflow log and view potential Approvers who are next in line for the PCR.

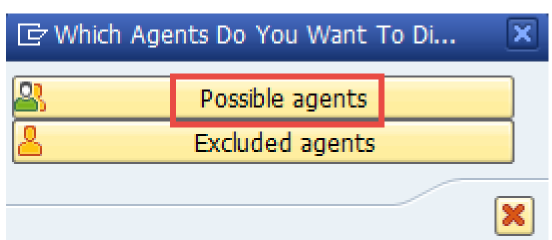


16. Click the **Agents**  button to view the list of Approvers for that step.

The Workflow Log is a document within Workflow that contains the Step, Status, Result, Time and Agent. The Workflow Log answers the question, "Who has the Workflow item in his/her Inbox?".

After you select the Log option, the next screen displays the various results for each step. In addition, the Agents option is displayed. Click the Agents icon to view the list of the Approvers for that step.

Once an approver approves a PCR, you might want to obtain a list of possible approvers. As an Initiator, you would be able to look at the Workflow Log after the PCR is returned to your Inbox.



17. Click the **Possible agents** button on the pop-up box to view the possible approvers available to approve this workflow.

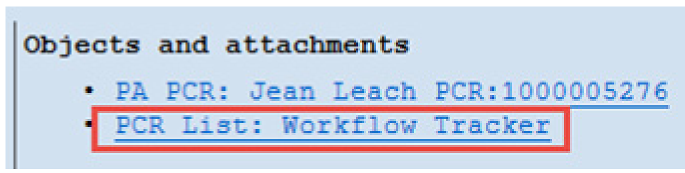
OSC Training

The Workflow Log example illustrated below *(not the same as on your screen)* indicates that this sample Work Item has two possible Approvers at this level: Angela Lisson or Robert Jefferson.

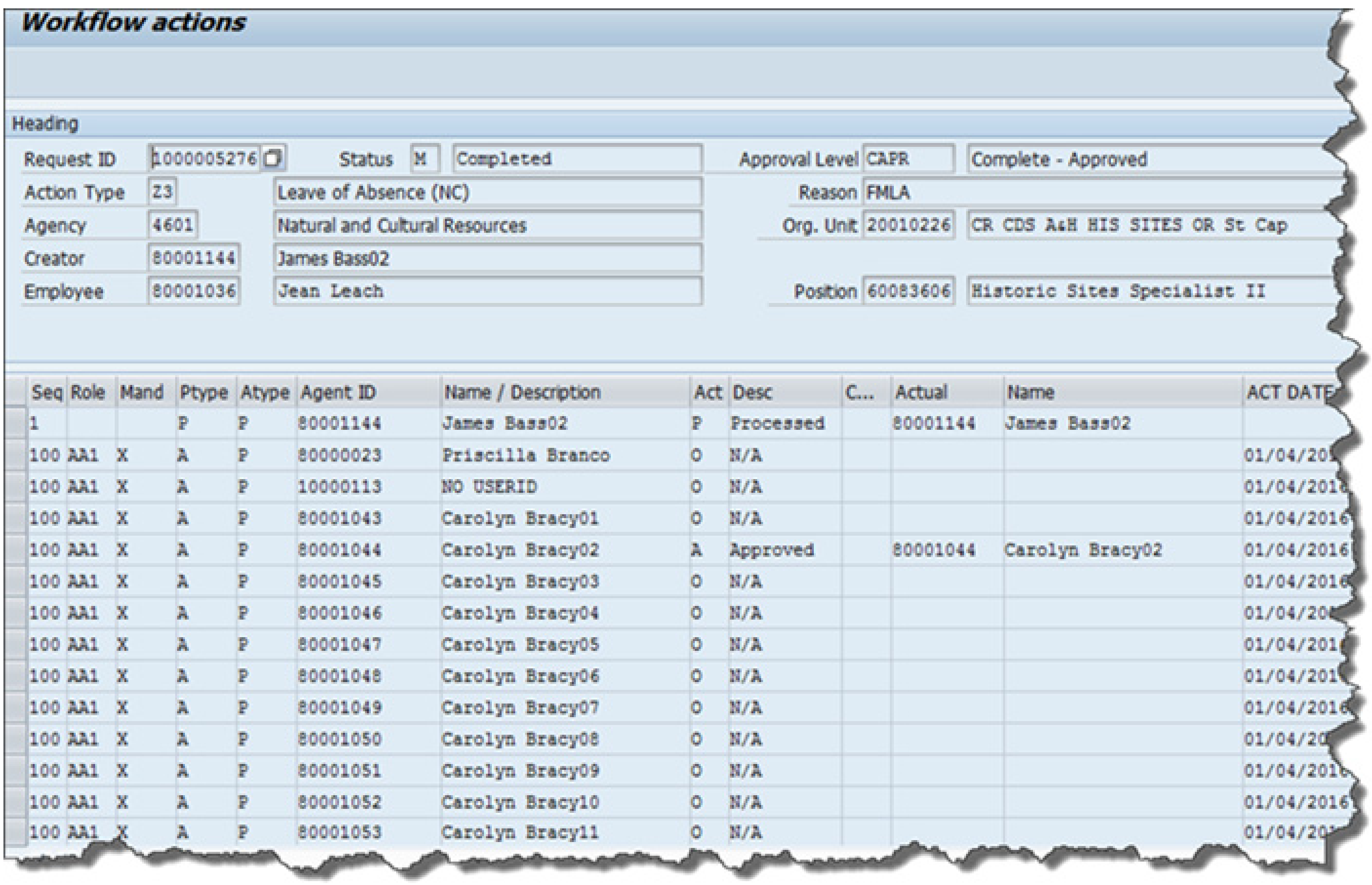
Note the Inbox button next to Angela Lisson. That indicates that, if the PCR was in the approval process, Angela Lisson would be the Approver who has it in her inbox.

18. Click the **X** at the upper right corner of the pop-up box to close the box.

19. Close the Click the **Back** button to return to the Workflow inbox.



20. **SINGLE** -click the **Workflow Tracker** at the bottom right corner of the screen.



Workflow actions

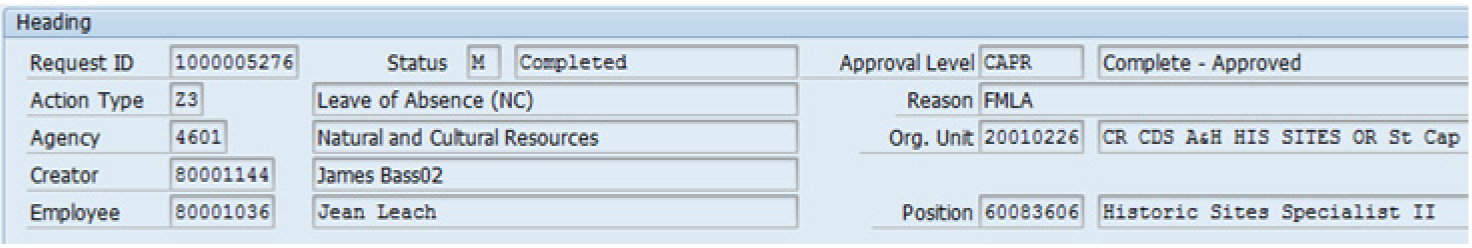
Heading

Request ID	1000005276	Status	M Completed
Action Type	Z3 Leave of Absence (NC)	Approval Level	CAPR Complete - Approved
Agency	4601 Natural and Cultural Resources	Reason	FMLA
Creator	80001144 James Bass02	Org. Unit	20010226 CR CDS A&H HIS SITES OR St Cap
Employee	80001036 Jean Leach	Position	60083606 Historic Sites Specialist II

Seq	Role	Mand	Ptype	Atype	Agent ID	Name / Description	Act	Desc	C...	Actual	Name	ACT DAT
1			P	P	80001144	James Bass02	P	Processed		80001144	James Bass02	
100	AA1	X	A	P	80000023	Priscilla Branco	O	N/A				01/04/201
100	AA1	X	A	P	10000113	NO USERID	O	N/A				01/04/2016
100	AA1	X	A	P	80001043	Carolyn Bracy01	O	N/A				01/04/2016
100	AA1	X	A	P	80001044	Carolyn Bracy02	A	Approved		80001044	Carolyn Bracy02	01/04/2016
100	AA1	X	A	P	80001045	Carolyn Bracy03	O	N/A				01/04/2016
100	AA1	X	A	P	80001046	Carolyn Bracy04	O	N/A				01/04/20
100	AA1	X	A	P	80001047	Carolyn Bracy05	O	N/A				01/04/201
100	AA1	X	A	P	80001048	Carolyn Bracy06	O	N/A				01/04/201
100	AA1	X	A	P	80001049	Carolyn Bracy07	O	N/A				01/04/2016
100	AA1	X	A	P	80001050	Carolyn Bracy08	O	N/A				01/04/20
100	AA1	X	A	P	80001051	Carolyn Bracy09	O	N/A				01/04/2016
100	AA1	X	A	P	80001052	Carolyn Bracy10	O	N/A				01/04/2016
100	AA1	X	A	P	80001053	Carolyn Bracy11	O	N/A				01/04/20

The Workflow Tracker is a link in the bottom right of the Inbox or Outbox screen (you may have to scroll in order to see it). Using Workflow Tracker, you can see which Approver has processed the PCR, the action the Approver took, and where the PCR is being routed next.

Additional Resources
You can find several additional support materials about PA PCRs on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/index.html Follow the following path to access the latest version of the job aid: *Personnel Administration > Job Aids* • How to Locate a PA PCR



The Header section of the Tracker will show, at a minimum, the following fields:

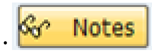
- Request ID (PCR Number)
- Action type (code and name)
- Status (the overall status of the work item
- Creator (Initiator)

In addition the header will include specific fields pertinent to the PA Action (like employee name).

The Detail section of the Tracker will list these attributes:

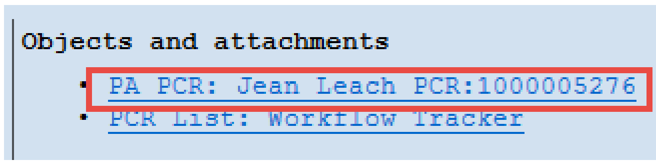
- Sequence (line item sequence)
- Role represents the approver relationship
  - — AA1 Agency Approver
  - — DA1 Division Approver
  - — OA1 OSHR
  - — FA1 Funding Approver
- An X in the Mandatory column indicates that the approval of the specific Approver is required.
- Ptype is used to signify the Processor (P) and Approvers (A)
- Agent ID represents the Personnel number of the Approver
- Name/Description lists the name of the Employee
- Act/Desc holds value (P) Processed
  - — A = approved
  - — R = rejected
  - — P = processed

- See the example below to view what a Rejected PCR looks like on the Tracker.

- An X in the Cmnt column will indicate if a rejection note has been created for the Action.
- To see the comment, highlight the line and click the Notes icon (eyeglasses). 

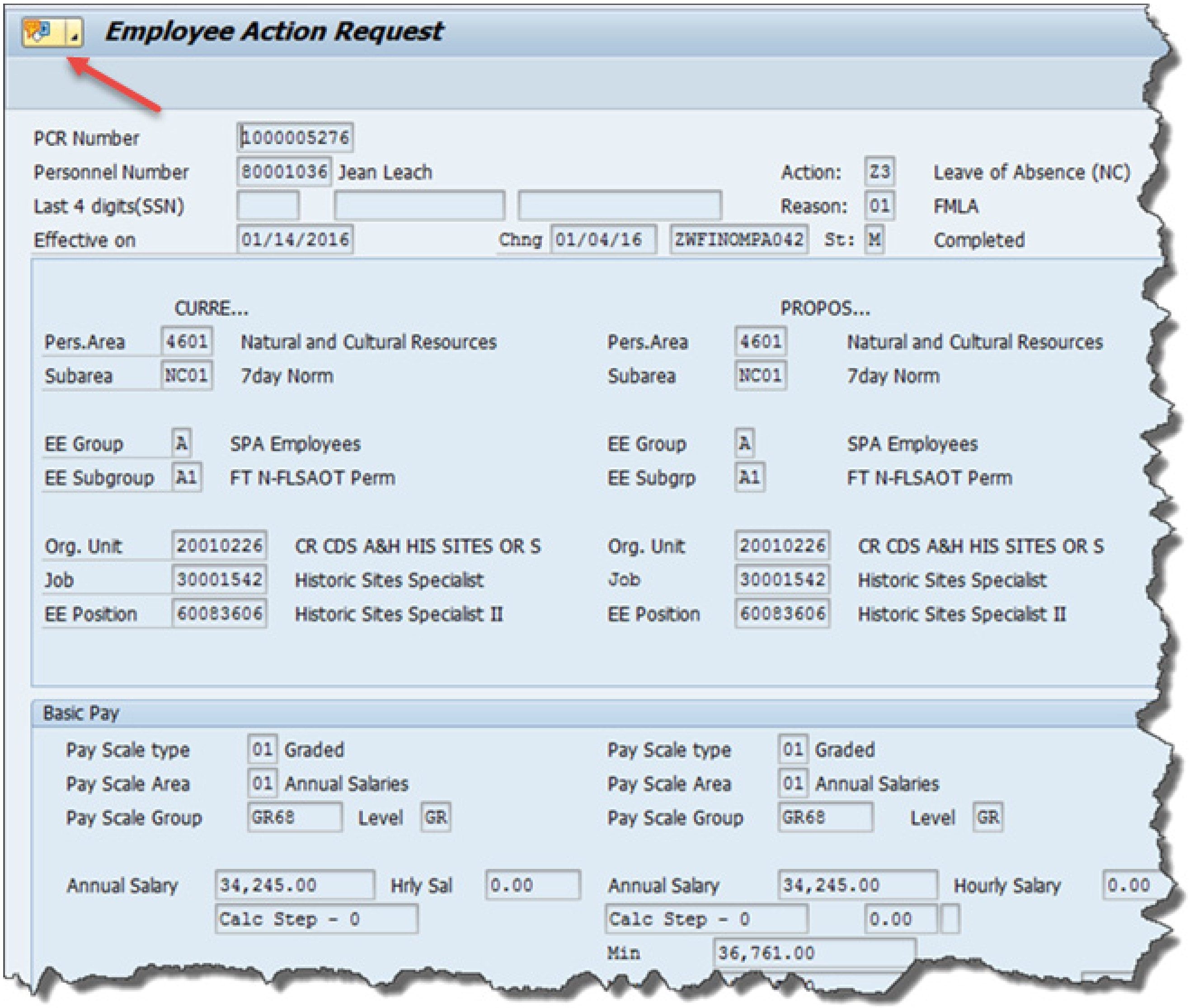
- Actual/Name is the Initiator's Personnel number and name.

21. Click the **Back** button to return to the Workflow inbox.



22. SINGLE-click the **PA PCR** at the bottom right section of the Workflow Inbox (just above the Workflow Tracker).

    The Employee Action Request screen you completed to initiate the Workflow Process is now displayed.



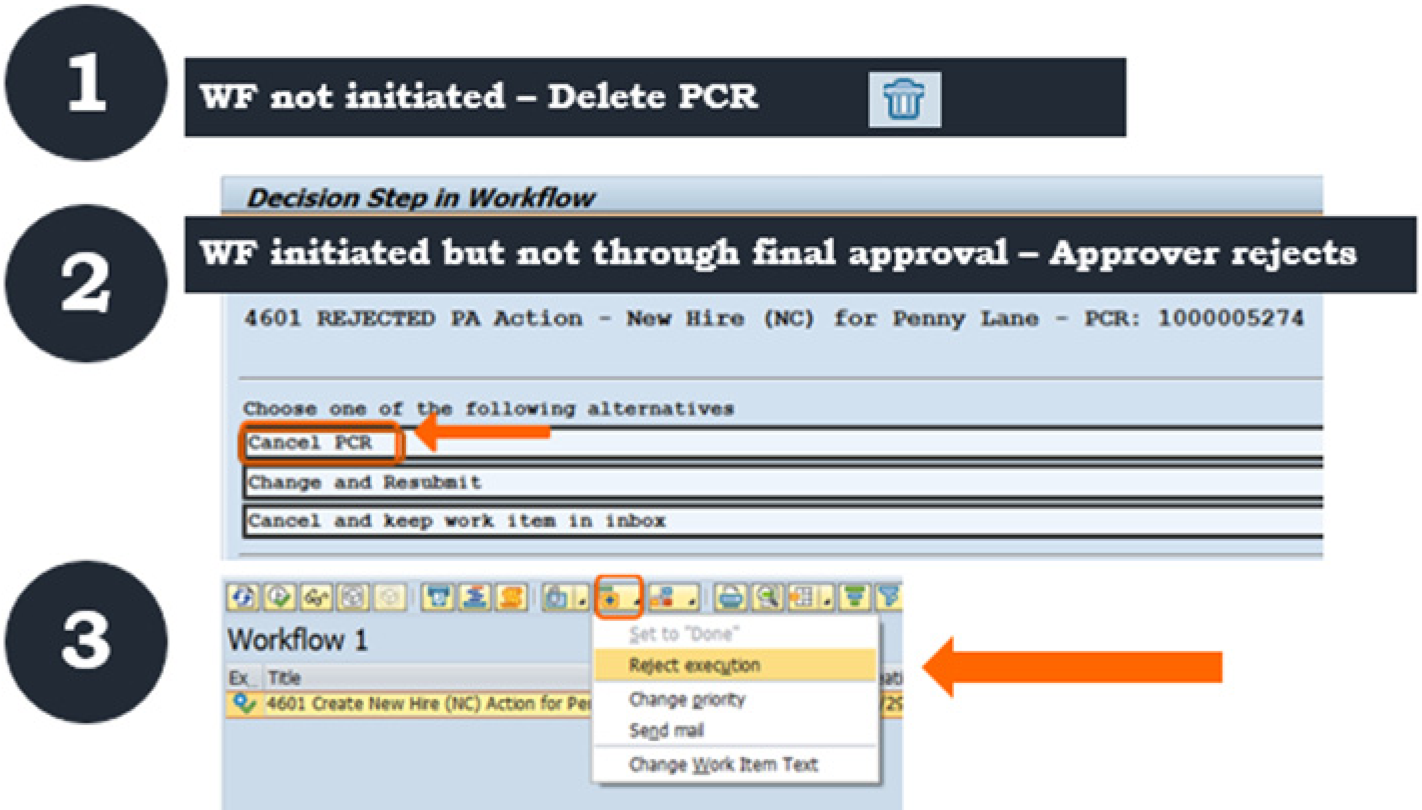
By using the Header, you can also access the Services for Object button to see any notes or attachments that were sent with the PCR.

23. Click the **Back** button to return to the Workflow inbox.

This exercise is complete.

* *

Deleting a PA PCR



The method the Initiator would use to delete a PCR depends upon where it is in the process.

1. **If the Workflow is saved but not initiated:**

   Use the Delete button on the Employee Action Request screen (ZPAA076).

2. **The Workflow was initiated but the PCR has not reached final approval:**

   The Initiator would contact the Approver and request that the PCR be returned (rejected) to them. They can then Execute the PCR. When the Decision Step in Workflow screen displays, they would click the Cancel PCR option (illustrated above). The PCR disappears from their Inbox. They can still see it in their Outbox > Started WFs; however, it will indicate it was Completed/deleted.

3. **The Initiator initiated Workflow and the PCR has been approved by final approver but not yet executed:**

   The Initiator can only use this option if they have **not executed** the PCR. The Initiator would highlight the PCR in their workflow inbox and click the "Other Functions" button. From the drop-down menu, select "Reject Execution" (see above). The PCR disappears from their Inbox. They can still see it in their Outbox > Started WFs; however, it will indicate it was Completed/Deleted.

KNOWLEDGE CHECK

Answer	Question
	1. On the Workflow Tracker, an X in the Cmnt column indicates whether a ___ has been created for the Action.
	2. Use the ___ to see which Approver has put the PCR on reserve.
	3. Click the ___ to access the Action screen to view the data entered for the PCR.
	4. When a PA PCR has been completely approved, the ___ receives the PCR back in his or her Inbox.
	5. It is important that only when the PA Action has been completely processed should the initiator mark the PCR workflow item as ___.
	6. If the PCR is touched more than ___ times, this places it at risk for being lost.

* *

Workflow Report Overview

The Workflow Report allows Approver and Managers to see at a glance the:

- Type of Actions and reasons created in the Agency
- Actions that are awaiting approval and at which approval level
- Length of time an approval has been waiting
- Transaction codes:
  - ZPA0189 (PA Workflow Report Current)
  - ZPAWFMON (PA Workflow Process Monitoring)
- Reports can be run based on security by:
  - Agency
  - Groups
  - Individual PCR
- Access the **Workflow Report Job Aid** online at:

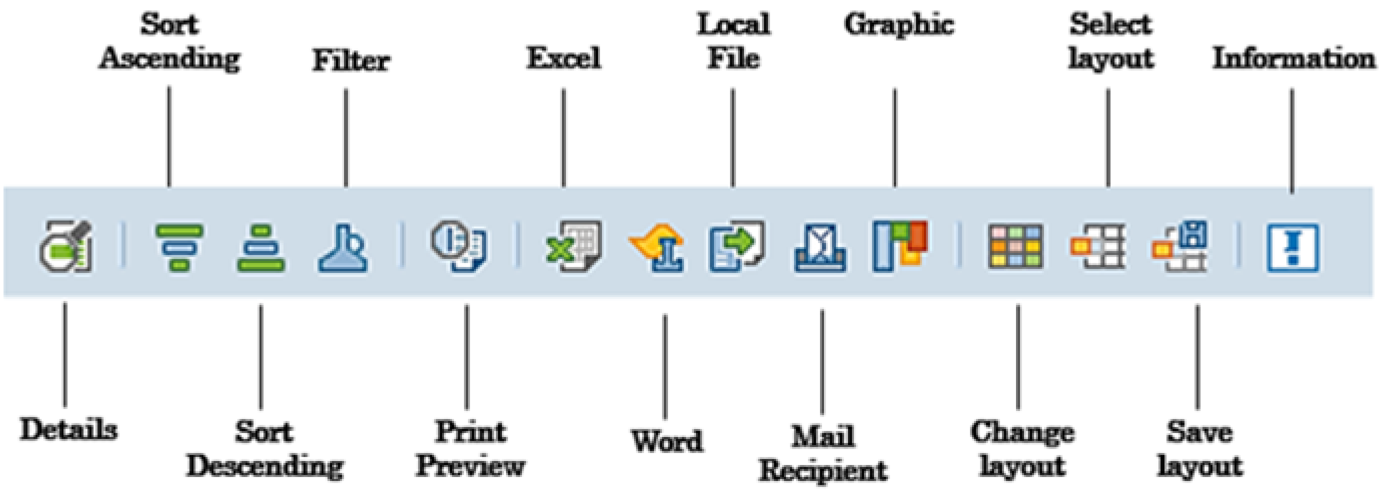
  http://www.osc.nc.gov/training/osctd/help/BI_Reporting/job%20Aids.html

Searching for PA PCRs

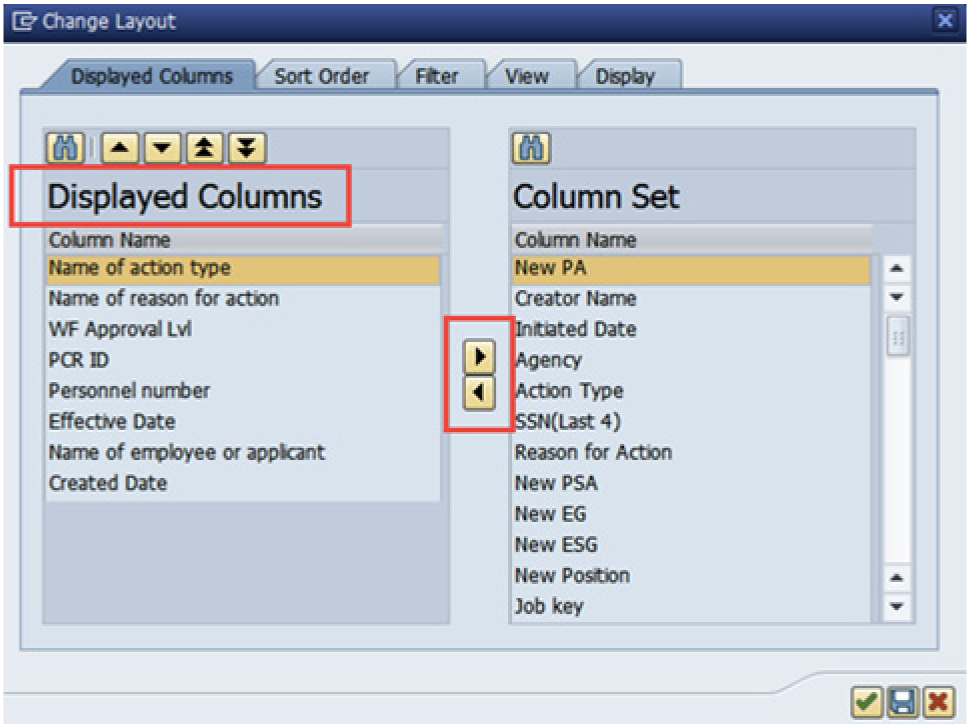
When using Workflow reports, results can be narrowed by utilizing some or all of the following criteria:

- Personnel number
- Action type
- Personnel area
- PCR ID
- PCR Workflow Approval Level

Report Options



Modify Layout



- Use the Change Layout option to remove fields that you do not want to display from left to right.
- Drag and drop columns on the report to change the order.

Save Layout

- Save layout field
  - — Short name (begin with Z for user-specific)
- Name
  - — Longer description for the layout
- User-specific
  - — Only you have access
- Default setting
  - — Indicates you want the layout to display each time the report is run

Use a Layout

- Complete search criteria fields for the report.
- Click the Select layout option.

- - OR - -

- From the menu: **Settings > Layout > Choose**.
- Select the applicable layout option.
- Execute the report.

* *

EXERCISE 8.2: Execute the Workflow Report (PA)

SCENARIO
You need to see if there are any Suspension and Reallocation Actions awaiting approval for the Natural and Cultural Resources Personnel Area. In addition, you want to change and save the layout to your specifications.
🗁 **NOTE**: For PA Actions use transaction code ZPA0189.

Instructions

1. From the Easy Access screen, enter **ZPA0189** into the Command Field.
2. **Enter**.
3. In the Action Type field, use the matchcode to select the codes for **New Hire** to **Separation**.

   🗁 You must use leading zeros in these fields.

4. In the Personnel Area field, use the matchcode to select **Natural and Cultural Resources**.
5. **Enter** and **Execute**.
6. Click the **Change Layout** button and move items on the left Columns Displayed panel to the Column Set on the right until only those in the list below are visible in the Columns Displayed:
   - Name of Action Type
   - Name of Reason Type
   - WF Approval Lvl
   - PCR ID
   - Personnel number.
   - Effective Date

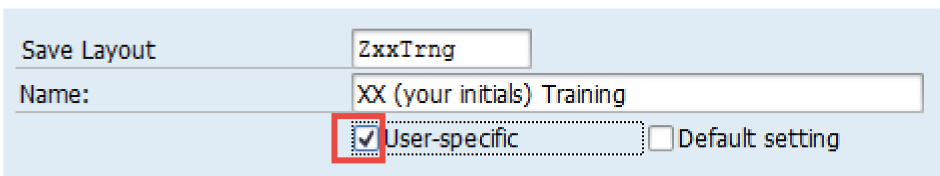
- Name of employee or applicant
- Created Date

7. Click the **green check** to close the Change Layout pop-up.

8. Assume you have decided to move the order of the columns. Drag and drop the columns so that they display left to right as shown below:

   - PCR ID
   - Name of Action type
   - Name of reason for Action
   - Effective Date
   - Created Date
   - Workflow Approval level
   - Pers. No.
   - Empl./Appl.name

9. Click the **Save Layout** button. The Save Layout pop-up box displays.



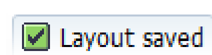
10. In the Save Layout field, enter: **ZxxTrng** (where xx = your initials).

NOTE: When you use the User-specific button, you must begin the field with the letter Z. When saving as a public layout, use the forward slash (/) at the beginning of the Save Layout name.

11. In the Name field enter **xx (your initials) Training**.

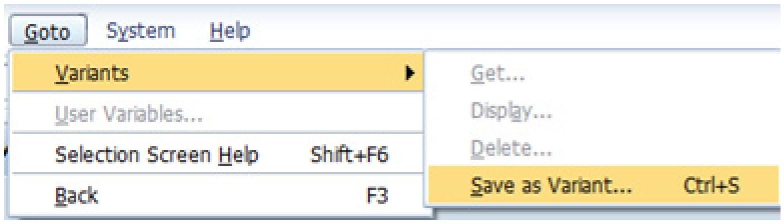
12. Click the **User-specific** checkbox. This indicates that the layout is restricted to your user ID. If you do not select User-specific, the layout can be used and modified by anyone with the security to run the report.

13. Click the green check. A message displays indicating that the layout is saved.

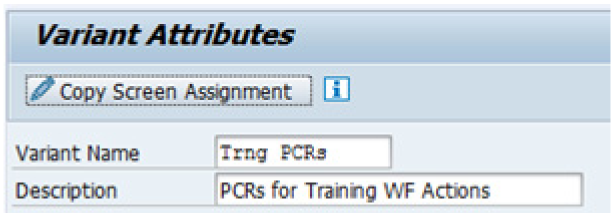


14. Click the **Back** button to return to the Report criteria screen.

Now save as a variant for the rest of your team to use.



15. On the Menu at the top of the screen, click **Goto > Variants > Save as variant**. The Variant Attributes screen is displayed.



16. Create a **name** in the Variant name field.

17. Create a **description** of the report in the Descript. Field that identifies the purpose of the report.

18. **Save** your variant.

    The next time you need to use a Variant:

    - Click the **Get Variant** button or select menu path Goto > Variants > Get.
    - In the pop-up box, double-click desired **Variant** to select.
    - The system will populate your report with the fields you set up when you created the variant.
    - **Modify** and **enter data** as needed prior to executing the report.

19. Click the **Back** button to return to the SAP Easy Access screen.

This exercise is complete.

* *

EXERCISE 8.3: Use a Saved Layout to Run the Workflow Report

SCENARIO
You need to see if there are any Promotion PA Actions for Personnel Area 4601 (Cultural Resources) awaiting approval. You want to use the layout that you previously saved.

1. From the Easy Access screen, enter **ZPA0189** into the Command Field.

2. In the Action Type fields, use the matchcode to select **Promotion**.

3. In the Personnel Area field, use the matchcode to select **Natural and Cultural Resources**.

4. Click in the **ALV** variant field and select the variant you previously saved.

5. **Enter** and **Execute**. The report should display with the same layout as in the previous exercise.

   NOTE: If you forget to select the variant prior to executing the report, you can still apply the variant after you are in the report by clicking the Select layout button and choosing the applicable saved layout.

This exercise is complete.

* *

Additional Resources
You can find several additional support materials about Workflow buttons, functions, and reports on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/index.html Follow the following path to access the latest version of the job aids: *Personnel Administration > Job Aids* • Business Workplace Button Functions • How to Cancel a PCR • How to Locate a PA PCR • PA Business Workplace Dynamic Columns & Layouts • PA Business Workplace Overview Tree Functions • PA Workflow Inbox • PA Workflow Routing Process • PA Workflow Steps in Approval Process

SUMMARY

This lesson described how to:

- Explain the purpose of Workflow
- Define key Workflow terms
- Describe the PA Personnel Workflow process
- Discuss the routing and processing of PA Workflow PCRs
- Understand the purpose of the PCR# and the PCR date
- Identify how to troubleshoot PCRs
- Execute the Workflow Report
  - — Access and execute the Workflow Report for PA
  - — Change the layout of the report
  - — Create a variant for the report
  - — Retrieve a report variant

Reviewing Additional Actions

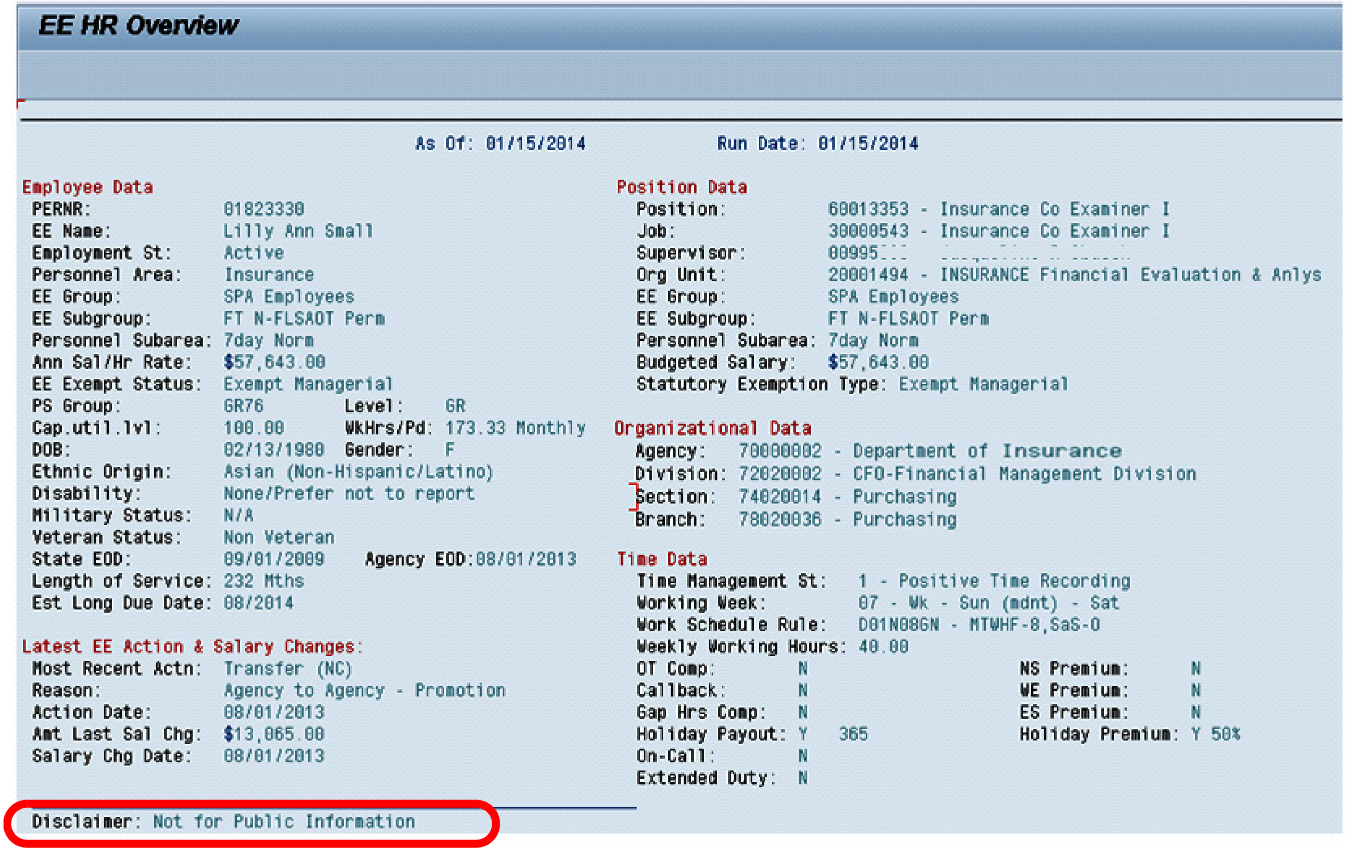
Objectives

- View the Employee HR Overview (ZEMP) screen
- View the Employee Infotype Overview report
- Describe the Work Against process
- Describe Dual Employment
- Identify additional Actions
  - Demotion
  - Investigatory w/Pay
  - Suspension
  - Cancel Salary Adjustment
  - Career Progression
- Describe the Employment Salary Verification Process
- Review the PA Change Log

There are several more Actions available in the HR/Payroll system than you have had the opportunity to practice in this class. One of those, Leave of Absence is discussed in detail in the *PA420 - Leave of Absence* and *PA370 - Short-Term Disability* classes.

The remaining Actions (listed above) are briefly discussed in this lesson.

EE HR Overview (ZEMP)



The Employee Overview screen is a "snapshot" of an employee's information.

The transaction is initiated by entering data to define who and what time frame an HR user needs to view a particular employee's information.

1. Enter **ZEMP** in the Command field on the Easy Access screen and press the **Enter** key or click the green check ball.

2. Enter an **Employee ID**.

3. The current date defaults into the Selection Date field. You have the option to enter any date that the employee has data in the system. If you enter a date that is not valid, you receive the message 'No Information for the date Entered'. If you are not authorized, you will receive a message indicating that you do not have authorization.

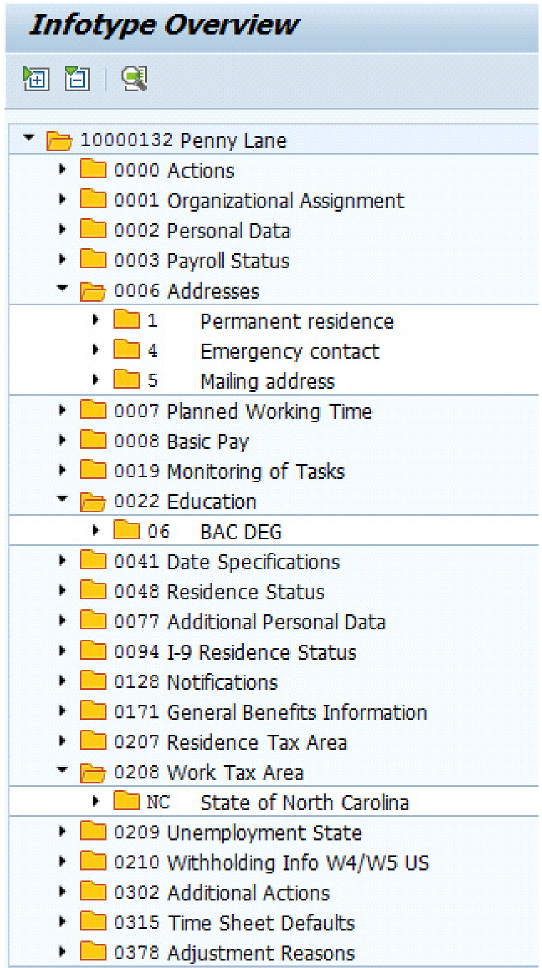
4. Click the **Execute** button to perform the transaction.

Areas of Data include:

- Employee Data
- Latest EE Action & Salary Changes
- Position Data
- Organizational Data
- Time Data

REMEMBER: This screen's data view is not intended as a source for public information.

EE Infotype Overview (pc00_m02_linf0)



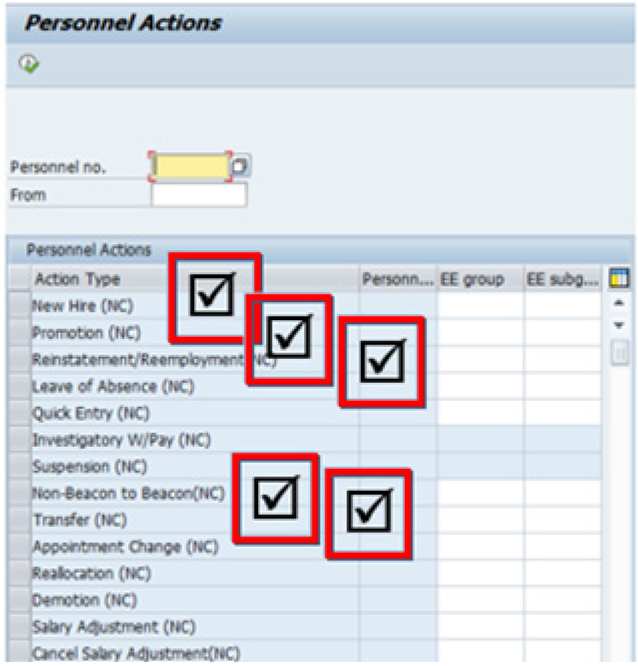
The EE Infotype Overview is a transaction screen that lists all active infotypes for an employee during a specified period of time.

Enter the Transaction Code PC00_M02_LINF0 in the Command field and press or click Enter. Make the necessary selections (personnel number and validity dates). Click the **Execute** button.

You can expand or collapse any and all of the infotypes.

To see the detail of a specific infotype (i.e., IT0001), double-click the infotype or select it and click at the top of the screen. The system will display the detail screen (same as *PA20 – Display Master Data*). You may click the green back arrow to return to the EE Infotype Overview screen.

Work Against Action



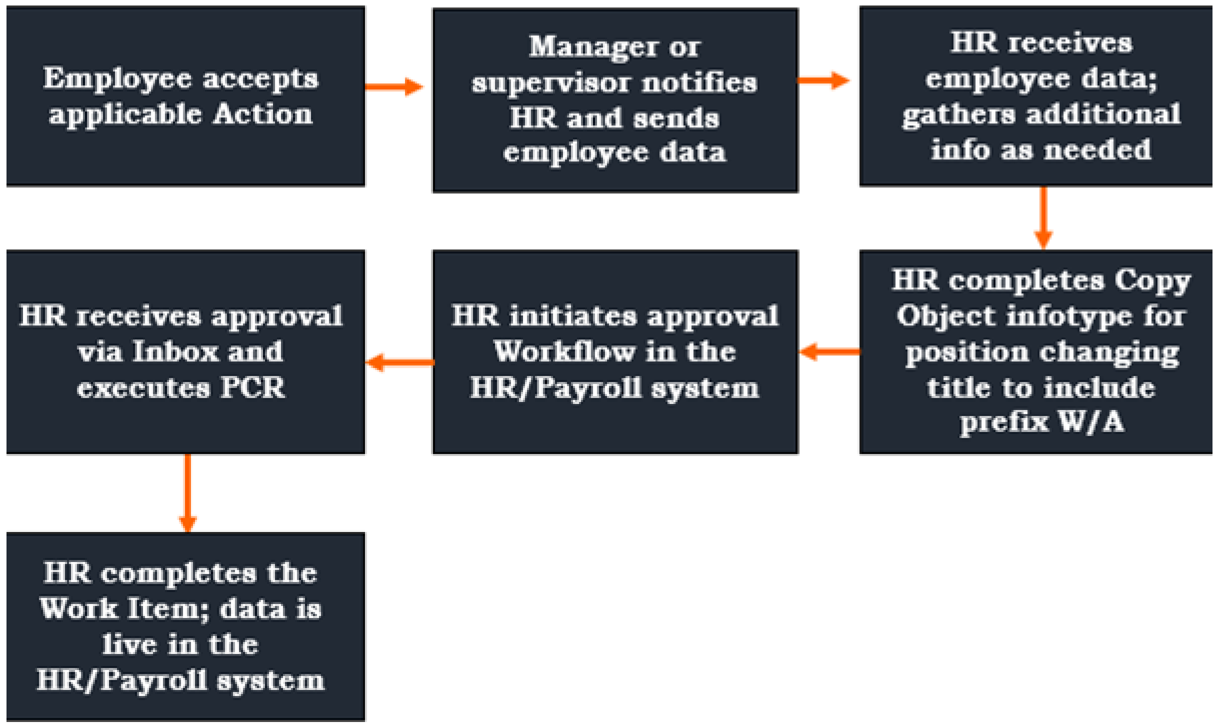
A **Work Against** can be used during many of the Personnel Administration Actions, including New Hire, Promotion, Reinstatement/Reemployment, Non-BEACON to BEACON, and Transfer. Specific rules for using Work Against are details on the following pages.

The rules for Work Against are available in the *Work Against* memo from the Office of State Human Resources.

The rules for the HR/Payroll system Work Against are explained in the above mentioned memo. In the past there have been vast differences in the understanding and application of Work Against. You should review the HR/Payroll system rules in depth to ensure that your agency consistently follows the guidelines. You may access the *Work Against* memo online at the OSHR website and the Training HELP site.

Additional Resource
You can find several additional support materials about the Work Against Action on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/ Follow this path to access the latest version of the Work Against memo: *Personnel Administration > Job Aids* • Work Against Memo

Work Against Process



The various complexities of an HR/Payroll system Work Against are outlined and described below and on the following pages.

The HR/Payroll system employee group and subgroup are used to designate the employee type.

Employees are no longer hired into positions that are titled specifically to describe the employee type. For example, there are no longer position titles with the words *temporary, intern,* or *probationary,* etc, as part of the title. Positions are named by the Job Classification title by default (Engineer I, Engineer II). The employee subgroup is changed to reflect if the employee is a *trainee, probationary, time limited, grant,* or *temporary* employee.

The employee and the position must have the same supervisor.

Whether the WA is for one or more employees assigned to a position, the employees and the position must report to the same supervisor. (The employee holds the position and the employee's position reports to the supervisor's position.)

The employee record (HR Personnel Administration) must be updated in conjunction with the position record.

There is only one PA Workflow for W/A, however, that one Workflow involves two separate components: PA (employee) and OM (position). The HR Master Data Maintainer must change the working title on the position first. Then you can create the PA PCR for the Employee.

CRITICAL: The Basic Pay data on the PA PCR must match the **W/A** title.

The position title should include the initials W/A as a prefix.

The position object name (title) is changed to include the prefix *W/A (maintained on PO13 by the agency)**. HR PA indicates the Work Against title by using the Services for Object button when creating the initial Workflow. Changing the position with this prefix ensures that reports accurately reflect all of the employees who are assigned to Work Against positions.

**maintained on PO13 by the agency*

The position title field will store the Work Against (W/A) title (employee working title) in work against situations. For example, an Engineer II working against an Engineer III would be handled as follows:

- Job Class Title: Engineer III
- Position Title before W/A Action: Engineer III
- Notes in PA PCR indicate employee is working as an Engineer II against the Engineer III
- Agency HR Master Data Maintainer modifies the Position Title to reflect the W/A Engineer II
- BI reports would reflect:
  — Job Title: Engineer III (does not change)
  — Position Title: W/A Engineer II (this is now the title of the Engineer III position)

A bona fide and approved job class must be used.

You cannot use an informal working title as the position title of a Work Against. The position title must be an official job (class) title. For example, Engineer IV is a valid job title. Therefore, an employee can work against an Engineer IV position, but the employee could not work against a "Safety Engineer" position. The title the employee is working against should be entered in the Notes attached to the PCR as previously described.

The timing of the employee record update and the position update must be coordinated to ensure consistency in data records.

In order for the Employee's record to be correct, you must update the position first for the working title to populate on the PA PCR.

Examples of Correct Work Against Usage

An OSHR review lowers employee title and grade (through no fault of the employee).

After a review by OSHR the duties of an employee are determined to be consistent with a title and grade level lower than the one the employee currently holds. Because the lower title and grade level were through no fault of the employee he or she will be allowed to work against the current title and grade, while the position title and grade will be changed to the lower levels. Example: The employee is currently working as an Environmental Program Manager III, at an 86 grade level. After the review, the position is changed to an Environmental Program Manager I position at an 82 grade level. As long as the employee remains in the position he or she will work against the Environmental Program Manager III position, grade level 86. When the employee leaves the position the agency will recruit for the correct position (Environmental Program Manager I, grade 82 in our example).

Hire two or more employees to work against a bona fide position (example: job sharing).

You can hire two or more employees to work against a position that is a bona fide and approved job title. The salary, appointment type and work schedule for each of the employees may be the same or may be different from each other. However, when hiring two or more employees to work against a position you must follow these additional rules:

- The total cannot exceed one full-time equivalent position.
- The combined salary of the employees cannot exceed the total amount budgeted for the position.
- The classification, supervisor and all other attributes must be the same for all employees working against the position.

Despite your best recruiting efforts you have not been able to fill a bona fide position.

You have an open position that is a bona fide and approved job title. Despite your best recruiting efforts you have not been able to fill that position. You can hire an employee to work against that position, as long as the person you are hiring and the position both report to the same supervisor.

Position moved to report to Supervisor.

If the position to which an employee will be working against does not report to the employee's supervisor, the W/A position will have to be moved. The W/A position must belong to the same org unit as the supervisor's position with the supervisor's position designated as the supervisor of the employee's W/A position.

Dual Employment

There are basically four scenarios to use dual employment:

- BEACON to BEACON (ITS to REVENUE)
- BEACON Employee Performing Dual Employment at Non- BEACON agency (DOT to NCSU)

All dual employment will be processed by BEST Shared Services. The information in this lesson is to provide you with a basic understanding of the processes and policies. When dual employment involves a non-BEACON to BEACON agency, BEST HR will execute a Quick Entry Action to assign the employee to the position. When the dual employment involves a BEACON to BEACON agency, BEST Shared Services will assign the holder (employee) to the position and then create Infotype 0554 – Hourly Rate per Assignment on the employee.

Because the HR/Payroll system is an integrated system, time, benefits and payroll are all affected by dual employment (unless the employee is hired into the borrowing agency as a temporary). In the HR/Payroll system, the hours of both jobs are combined to determine benefits and time. That is why it is important for the Parent and Borrowing agency to sign the agreement **before** the employee begins working dual employment.

The Parent agency must now be aware that if one of its employees works dual employment and becomes eligible for benefits (based on extra hours worked), there will be a cost to the Parent agency. In the past, the number of hours the employee worked at the borrowing agency did not matter.

Additional Resource
Go to the BEST website to access the Dual Employment form on the OSC BEST website: http://www.osc.nc.gov/BEST/forms/Dual_Employment_Form_BEST%20site.pdf

Dual Employment - Time and Overtime

Time

Employees are changed to positive time when performing Dual Employment. BEST Shared Services will enter the employee's time.

Overtime

- When overtime occurs as a result of additional work, it shall be paid. Compensatory time cannot be given.
- Overtime shall be paid by the agency where the overtime occurs. This is based on the standards expressed in the Dual Employment Agreement signed by the employee and both agencies.
- It is the responsibility of the Borrowing agency to work with the Parent agency to determine if overtime occurs and to arrive at the appropriate overtime rate according to FLSA. To calculate "premium rate," add hourly rates including all non-discretionary payments (i.e. Shift premium, weekend premium) and divide by standard hours.

Comp Time Agreement of Both Agencies

Both agencies shall agree that comp time earned prior to the Dual Employment Agreement as well as leave can be taken in either agency, not just the agency where earned.

Ending a Dual Employment

The agency submits the Separation form to BEST requesting termination of services. The form may be accessed from the BEST website.

Miscellaneous Dual Employment Policies

Payment to the Parent Agency

If both agencies are under the HR/Payroll System, it will no longer be necessary to send a check to the Parent agency. The HR/Payroll system will automatically charge the payment to the appropriate salary account as shown on the approved Dual Employment Form. The employee receives one direct deposit (paycheck).

Workers' Compensation

When an employee who holds two separate jobs, is injured in one of them, the employee's Workers' Compensation entitlements are based only upon the average weekly wages earned in the employment producing the injury. (GS 97-2.) Over 40 hours paid - weighted average. Average weekly wage will be manually calculated and provided to the Workers' Compensation specialist.

CP30

As indicated above, there are only two circumstances when a CP30 is needed. When the situation warrants a CP30, it is only sent to BEST by the HR/Payroll agency who received the funds. The CP30 is not sent by the employee nor by the secondary agency. When the parent agency sends the CP30 to BEST, that agency is verifying that funds are available. The parent agency ensures that the CP30 is only sent to BEST one time.; therefore if the agency emailed the CP30, it does not need to then fax the form as well. Sending a CP30 in for an employee more than once increases the likelihood that the employee may be paid more than once.

The employee completes a paper time sheet at the second agency which is signed and approved by the supervisor. The time sheet should have the hourly rate, the position number and contain the words "Dual Employment". The time sheet is sent to BEST who will enter the time for the secondary position. The employee enters time as usual for the primary position.

Dual Employment Policy Examples

Below are examples of how dual employment affects benefits and time:

Permanent full-time (FT) or permanent part-time (PT) employee working temporary in another agency

A typical dual employment situation involves a permanent FT or PT employee in one agency doing temporary work for another agency and typically paid a flat amount either in a lump sum or monthly over the course of employment (it may also be an hourly rate). Benefits are paid by the full-time, 30-hour or more position.

Permanent part-time employee working permanent part-time in another agency but the total of two part-time jobs adds up to less than 30 hours per week

Handle as regular dual employment. The benefits involved are leave, NC Flex, 457 Savings Plan. If the employee works as much as 20 hours per week in one agency, the employee is entitled to leave benefits in that agency. The leave accrual and usage will have to be based on the standards expressed in the Dual Employment Agreement signed by the employee and both agencies.

Permanent part-time employee working permanent part-time in another agency that adds up to 30 hours or more (not to exceed 40) per week

This type is different from other dual employment. The same approval is required; however, Parent agency must be willing to pay its share of benefits. In this situation the employee would be eligible for full benefits. Both agencies must be willing to pay their prorated share of retirement, health insurance, etc. If this arrangement cannot be worked out then the additional employment must be as a ***temporary*** appointment. Parent agency owns the one leave record. Borrowing agency sends paper copy of timesheet to Parent agency so that Parent agency can bill Borrowing agency. If Parent agency is in the HR/Payroll system, the time sheet is forwarded to BEST Shared Services for entry.

Demotion Action

Demotion is a change in status resulting from assignment to a position assigned a lower salary grade. The action is a demotion if the change in status results from inefficiency in performance or as a disciplinary action. All necessary disciplinary paperwork must be approved prior to the demotion process by the appropriate authorities.

Either skip or delimit the objects on loan depending upon your agency's policy.

Reasons associated with the Transfer Action	
• Personal Conduct – Position • Gross Inefficiency – Position • Unsatisfactory Performance – Position • Personal Conduct – Job Reallocation • Gross Inefficiency – Job Reallocation	• Unsatisfactory Performance – Job Reallocation • Personal Conduct – Salary • Gross Inefficiency – Salary • Unsatisfactory Performance – Salary • 115C Demotion

Additional Resources
You can find several additional support materials about the Demotion Action on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/ Follow this path to access the latest version of the Demotion BPPs and Job Aids: *Personnel Administration > BPPs* • Demotion Action *Personnel Administration > Job Aids* • PA Actions Reasons Definitions

Investigatory w/Pay Action

An employee may be placed on Investigatory Status with Pay to allow the agency adequate time to investigate the validity of the allegations of unsatisfactory performance/unsatisfactory conduct. If allegations are confirmed, the agency will determine what further disciplinary action may be warranted.

Reasons for Investigatory w/Pay Action

- Investigatory Placement Leave
- Extended

When an employee is placed on leave with pay, his/her leave balance is not used. C*ode 9690 - Investigatory Leave* should be entered on the timesheet. Follow agency policy for approvals.

Use the *Monitoring of Tasks (IT0019)* infotype to remind you about the return date.

Either skip or delimit the objects on loan depending upon your agency's policy.

Additional Resources
You can find several additional support materials about the Investigatory w/Pay Action on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/ Follow this path to access the latest version of the Investigatory w/Pay BPPs and Job Aids: *Personnel Administration > BPPs* • Investigatory w/Pay Action *Personnel Administration > Job Aids* • PA Actions Reasons Definitions

Suspension Action

The Suspension Action is used to remove an employee from work for disciplinary reasons ***without paying*** the employee.

Reasons associated with the Suspension Action	
• Conduct • Unsatisfactory Performance • Gross Inefficiency	• 115C Pre-Disciplinary • 115C Disciplinary

Since it is presumed that the employee will return to work you would use the M*onitoring of Tasks (IT0019)* infotype to remind you about the return date.

Either skip or delimit the objects on loan depending upon your agency's policy. Follow your agency policy for approvals.

An IT2012 will be created automatically in the background to prevent payment of longevity as a result of a suspension. Do not delete or change this infotype. HR should monitor length of service after the employee is reinstated to be sure they receive the appropriate audit. Issues should be directed to BEST HR.

Additional Resources
You can find several additional support materials about the Suspension Action on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/ Follow this path to access the latest version of the Suspension BPPs and Job Aids: *Personnel Administration > BPPs* • Suspension Action *Personnel Administration > Job Aids* • PA Actions Reasons Definitions

Cancel Salary Adjustment Action

A **Cancel Salary Adjustment** is a decrease in an employee's salary within the employee's current salary range and within the agency where the employee is currently employed.

Reasons associated with the Cancel Salary Adjustment Action	
• Cancel Salary Adjustment • Cancel Acting Pay/Promotion • Cancel Lead Adjustment • Cancel In-range Adjustment • Cancel Geographic Differential • Cancel Site Differential • Cancel CGRA	• Cancel Legislative Increase • Cancel Career Progression • Cancel LEO Sworn • Cancel Temp Comp/Skill • Cancel Temp IRA for Job Change • Cancel Auto Sal Adj (AOC Only)

The same reasons that existed to give an employee a salary adjustment also exist to cancel the adjustment (with the obvious exception that the word *cancel* precedes it). For example, you give an employee an *acting pay* salary adjustment and then decide to cancel the action by selecting *Cancel Acting Pay.*

Additional Resources

You can find several additional support materials about the Cancel Salary Adjustment Action on the OSC Training HELP website:

http://www.osc.nc.gov/training/osctd/help/

Follow this path to access the latest version of the Cancel Salary Adjustment BPPs and Job Aids:

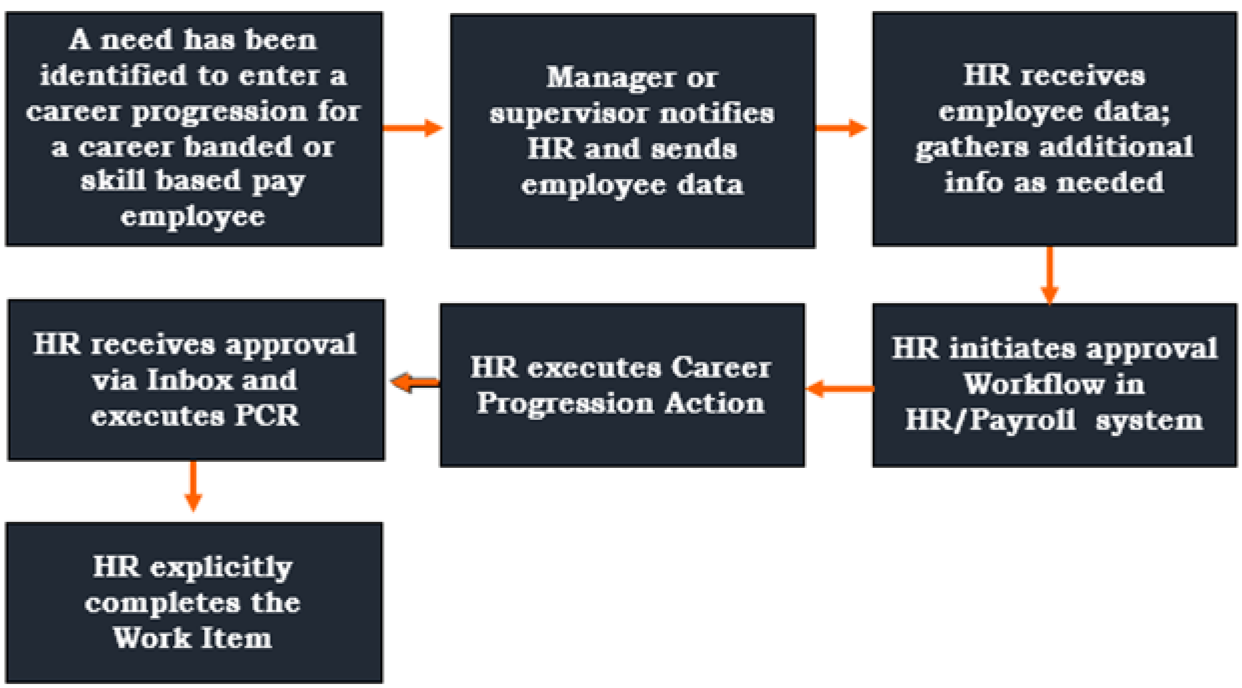
Personnel Administration > BPPs

- Cancel Salary Adjustment Action
- Salary Adjustment Action

Personnel Administration > Job Aids

- Salary Adjustment Action Guide
- PA Actions Reasons Definitions

Career Progression Action



A Career Progression is used for employees in banded classes and may be granted in conjunction with demonstrated competencies or as justified through the labor market. For example, an employee was hired at a *contributing* level and given certain goals to reach to advance to the *journey* level. After the employee achieves goals his or her manager requests that the position be changed to journey. HR will then execute the Career Progression Action on the employee.

Career Progression is used when pay factors support a salary adjustment within the pay range of the career-banded class and when the employee attains and uses more advanced competencies in same position. Salary eligibility is based on application of all F.A.I.R.* pay factors. When an employee demonstrates required competencies in a position but is not yet at market index, s/he may receive a Career Progression.

Employees with active warning/disciplinary actions or with overall *below good* or *unsatisfactory* ratings are **not** eligible for a career progression adjustment based on competency assessment.

** F.A.I.R.*

F Financial Resources

A Appropriate Market Rate

I Internal Pay Alignment

R Required Knowledge, Skills, and Abilities

Reasons for a Career Progression

Reasons associated with the Career Progression Action	
• CP-Comp/Skill • CP-Labor Market • CP-Comp Level Change	• Broad Band Level Change • Broad Band Job Change • Temporary Comp/Skill

CP-Comp/Skill - pay factors support a salary increase within the pay range of the employee's career-banded class in conjunction with the employee's attainment and demonstrated use of competencies in the same position. Overall competency level may or may not change. If a salary increase is not granted due to funding issues, and competency level does not change, a Career Progression Action is not processed.

CP-Labor Market – an employee's salary is low in relation to market guidelines applicable to the employee's competencies, and a salary increase is in order. Such a situation could be due to an adjustment in the banded class market rates in conjunction with a labor market study, implementation of a market reference rate with the agency/university, insufficient funding at time of career banding implementation to pay employee at appropriate rate, or removal of an internal equity/ pay alignment issue that had prevented an employee from being paid at appropriate competency rate.

CP-Comp Level Change – employee's competency level changes although a salary increase is not granted. Employee's attainment and demonstrated use of competencies results in a higher overall competency level. However, due to funding issues, or because employee's salary already exceeds the appropriate rate, salary is not increased.

Broad Band Level Change – a change in the level to which an employee is assigned.

Broad Band Job Change – a transfer of an employee from one banded occupational group to another banded occupational group. This may or may not involve position number and salary change. The Object ID (job) must change, therefore, you must coordinate with Organizational Management. If a salary change is involved, the reason for the adjustment and justification for any increase exceeding 10% should be included in the **Comments** section.

Temporary Comp/Skill - Salary adjustment within the pay range of the employee's career-banded class, in conjunction with the employee's temporary assignment of higher level competencies in the same position. Overall competency level may or may not change. **NOTE**: Additional competencies are not the result of "acting pay or acting promotion."

Additional Resources
You can find several additional support materials about the Career Progression Action on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/ Follow this path to access the latest version of the Career Progression BPP: *Personnel Administration > BPPs* • Career Progression Action

Employment / Salary Verification

The BEST SSC Call Center is responsible for both Employment and Salary Verifications for the State Agencies.

Employment Verifications

Most Employment Verifications for loans are completed verbally over the phone by the Call Center Rep when the call is received.

- Person calling
- Company calling from and a contact number
- EE requesting the information on
- Information requested – only Public Information can be given out on the phone

Salary and Child Support Verifications

Salary and Child Support Verifications require written requests and are completed by a payroll specialist.

If a Salary Verification request has specific questions pertaining to the employee –such as –"is the employee still eligible for employment" or requests information on hours worked or out on leave, the request may be forwarded to the agency for assistance.

If an agency receives a request for an Employment Verification, the request may be sent to BEST for assistance or the agency can give the requester the BEST phone number to call directly.

PA Change Log

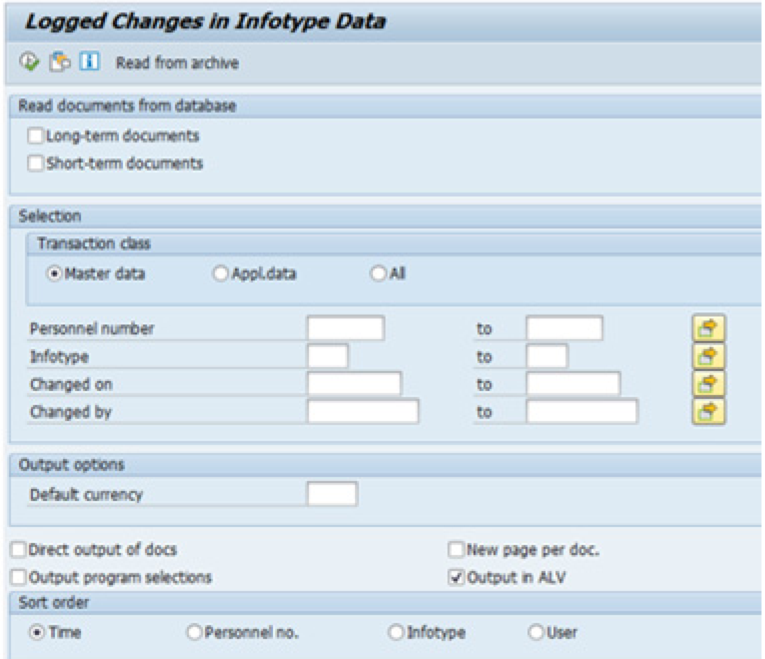
The PA Change Log report transaction allows you to see a log of changes that have been made to PA infotypes. Changes are being logged for most of the commonly used PA infotypes. These logs are available for changes made in the previous six (6) months. Change log data older than six months will be archived but still available. Contact BEST for assistance in retrieving these records.

The transaction code used for this report transaction is **ZPACHGLOG**.

Users with the following roles will be able to run ZPACHGLOG:

- HR Master Data Maintainer
- HR Master Data Approver
- HR Director Display

The Initial Screen



Selection Section

- Entering specific selection criteria will help the program run quicker and give you more targeted results.
- Enter the Personnel Number of the employee(s) for whom you want to see change log data.
- Enter the value of the infotype(s) for which you want to see change log data.
- Enter a date or date range if you know when the change(s) were made.
- Enter the Personnel Number of the person who made the changes.

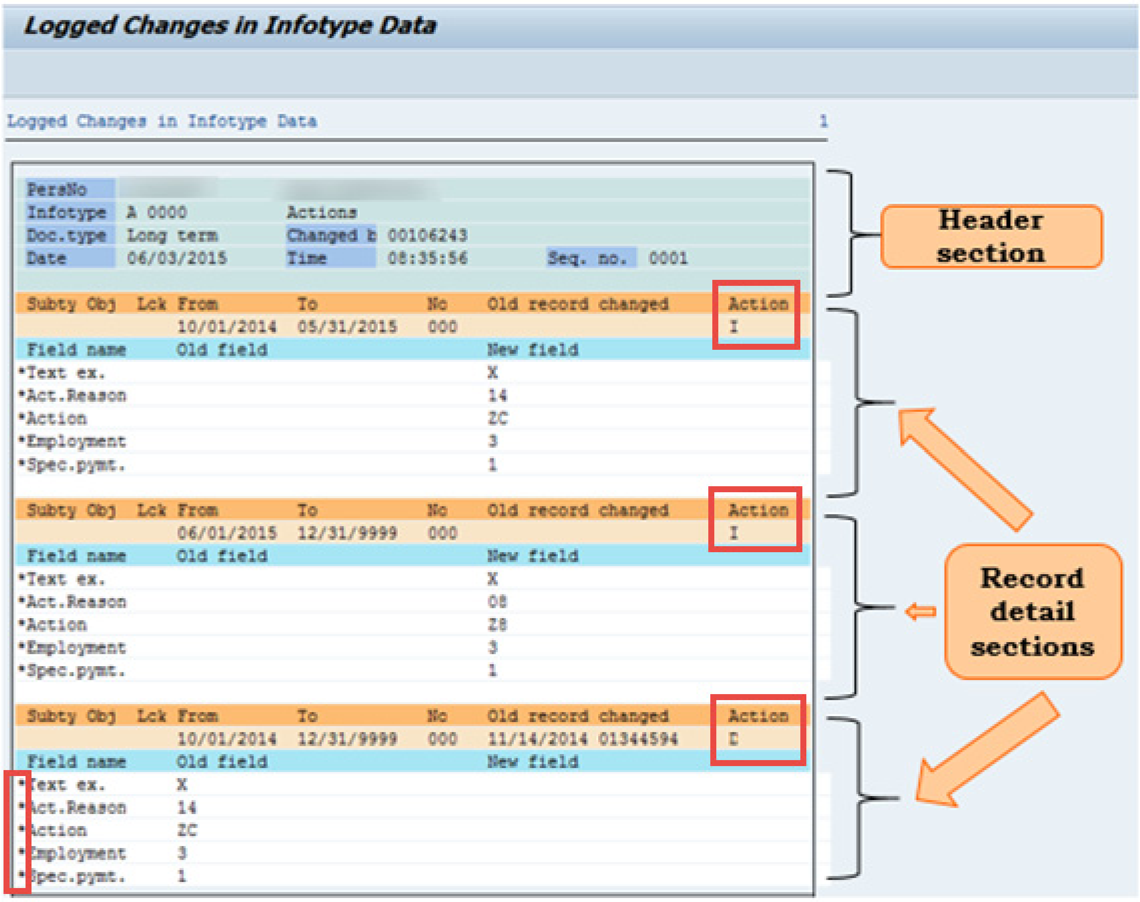
NOTE: The other settings on the initial screen affect how the results are formatted.

Result Screen

An overview list of changes is presented first. Clicking on a row and then clicking on the **Choose** button will display the detail screen for that change.

NOTE: By default, the oldest changes are listed first. The Sort Order selection option on the initial screen can be used to change the sort order to display by Personnel Number, Infotype, or the User who made the change.

On the detail screen you will see a header section and one or more record detail sections.



The header section displays the following information:

- Personnel Number and name of the employee
- Infotype value and name
- Changed by and the Date and Time (who and when the change was made)

The record detail sections displays:

- The From and To validity dates of the record
- The Type of change Action (Insert, Delete, or Update)
- The Old and New values for the specific Fields on that Infotype

The particular change shown below caused an existing record (shown at the bottom; effective from 1/14/08 to 12/31/99) to be "Deleted" (indicated with the "D" Action indicator), and replaced by two "Inserted" records (indicated with the "I" Action). The two new inserted records span the same effective period as the old record.

Take note of the Action indicators in the example above circled in red.

An asterisk (*) to the left of the Field name in the record detail section indicates there is a difference between the Old and New values for that Field. This indicator will be most helpful in cases where an existing record has been Updated (by using the **Change** button).

Additional Resources
You can find additional support materials about the PA Change Log on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/ Follow this path to access the PA Change Log Job Aid: *Personnel Administration > Job Aids* • PA Change Log

Leave of Absence Class

The *PA420 - Leave of Absence* class is an ADVANCED level class. You should only take this course if you have first become comfortable processing Actions in the HR/Payroll system. The class is designed for the mature system user in that the course assumes an experienced processor of actions and the course content begins at that point. Concepts are presented based on a strong foundation and comfort level of the SAP Workflow process.

If you have questions regarding your readiness to take this course, please contact the HR/Payroll Training Team for further counsel.

SUMMARY

This lesson described the Work Against process. It also described the Dual Employment process including time entry and overtime. The lesson also described several other Actions. Elements of the Employee and Salary Verification process were explained.

Course Review

Course Objectives

In this course you learned to:

- Describe the process for the various Actions
- Create new records associated with the life cycle of an employee
- Modify existing employee data

Next Steps

- Monitor the HR/Payroll System communication
  - BEST Shared Services web site (especially the Updates tab)
    URL: http://www.osc.nc.gov/BEST/index.html
  - BEACON Training website: **What's New** link
    URL: http://www.osc.nc.gov/beacon/training/whats_new.html
- Review conceptual materials
- Access the Training HELP site

  URL: http://www.osc.nc.gov/training/osctd/help
- Practice what you've learned

  URL: http://mybeacon.nc.gov
  - Client 899
  - Use your current NCID user name and password

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

🗁 Follow the link provided above to access the training client through the HR/Payroll Portal. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance?

Remember to access the Training HELP website when you need assistance in completing transactions. As stated above, the work instructions can be accessed on line through the web link in the steps above.

Course Assessment/Evaluation

Follow the instructions given by your instructor to complete your Course Assessment and Class Evaluation of today's class in the Learning Management System (LMS).

> **PROCESS NOTE**: On the Course Evaluation, you must enter text in all text fields. If you leave the field blank, the screen will clear all your responses when you click the Submit button and re-display for you to complete.
>
> If you do not wish to comment, please type NA in the field so you can complete the evaluation process.

CONGRATULATIONS!

You've completed the course!

PA310 Transaction Log

EX #	Exercise Title	Data to Enter	PCR Eff. Date	PERNR /PCR #
3.1	New Hire Action ________________	SSN: ____________________ Pos # used: ____________________	______________	PCR #: ______________ PERNR: ______________
3.2	Non-Beacon to Beacon Action *Anita* ______________	SSN: ____________________ Pos # used: ____________________	______________	PCR #: ______________ PERNR: ______________
3.3	Reinstatement/Reemployment Action *Karla Hart*	PERNR used: ____________________ Pos # used: ____________________	______________	PCR #: ______________
4.1	Salary Adjustment Action *EE you hired in Ex 3.1*	PERNR used: ____________________ Pos # used: ____________________	______________	PCR #: ______________
4.2	Appointment Change Action *Leona Grayson*	PERNR used: ____________________	______________	PCR #: ______________
4.3	Reallocation Action *Emily Stafford*	PERNR used: ____________________	______________	PCR #: ______________
5.1	Promotion Action *Karla Hart*	PERNR used: ____________________	______________	PCR #: ______________
6.1	Separation Action *Nicole Ahrens*	PERNR used: ____________________	______________	PCR #: ______________
6.2	Sep. Pay Continuation Action *Inez Hayes*	PERNR used: ____________________	______________	PCR #: ______________

i

EX #	Exercise Title	Data to Enter	PCR Eff. Date	PERNR /PCR #
7.1	Transfer Action – *(Within Agency-Lateral)* *HELEN STEPHENS*	PERNR used: ____________________ Pos # used: ____________________	____________	PCR #: ____________
7.2	Transfer Action – *(Agency to Agency-Promotion)* *MARSHA SANDERS*	PERNR used: ____________________ Pos # used: ____________________	____________	PCR #: ____________