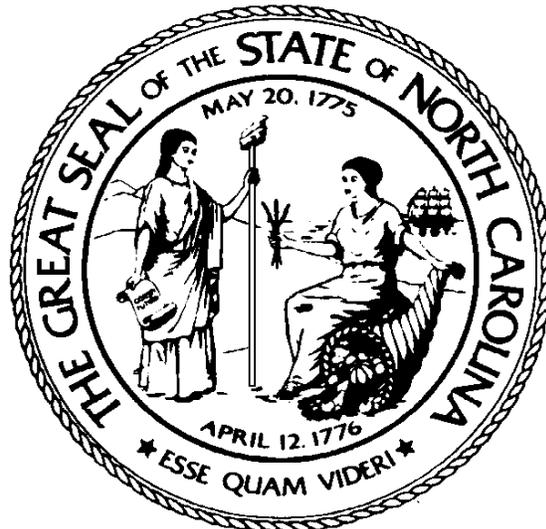


PA322

**Create & Maintain
Disciplinary Actions**

VIRTUAL TRAINING COURSE



State of North Carolina

Office of the State Controller

November 9, 2016

For assistance with any TRAINING needs, contact:

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TABLE OF CONTENTS

Introduction 1

- Overview 1
 - Pre-requisites 1
 - OSC HR/Payroll Training Curriculum 2
 - PA Curriculum by Security Role 2
- Strategy for Training 3
- Performing Class Exercises 3
- Instructor Demonstration 4
- Course Map 5
- Course Objectives 5
- Reference Materials 5

Terms, Concepts and Infotypes Overview 7

- Lesson 1 Objectives 7
- PA30 - Maintain Master Data 8
- Infotype for Disciplinary Actions 9
- Monitoring of Tasks (IT0019) 10
- Description of Buttons 11
- Copy and Change Options 12
- Entering End Dates 12

Create and Maintain a Disciplinary Action Record 15

- Lesson 2 Objectives 15
- Generic Disciplinary Action Process by Role 15
- Disciplinary Actions 16
- Inactivate versus Removal 22
- Reporting 26

Course Review 29

- Course Objectives 29
- HR/Payroll System Integration 29
- Next Steps 30
- Course Assessment/Evaluation 30

Introduction

Introduction

Lesson 1: Terms, Concepts and Infotypes Overview

Lesson 2: Create and Maintain a Disciplinary Action Record

Lesson 3: Course Review

Overview

Welcome to the *Create and Maintain Disciplinary Actions* - PA322 Virtual Class.

The security role is called the Warnings Maintainer. The focus of the class is on the transactions that pertain to specific infotypes on the employee's records. In the event that a correlating Workflow action (like a Suspension) needs to be entered as well, you must ensure that you communicate appropriately with the HR Master Data Maintainer to have those records entered.

Based on the pace of the class, the instructor will determine a logical place to conclude session A (which may or may not be at the end of a lesson).

The course introduction is an opportunity to get to know others who are attending class as well as to agree on training courtesies. There will be at least one break during this session.

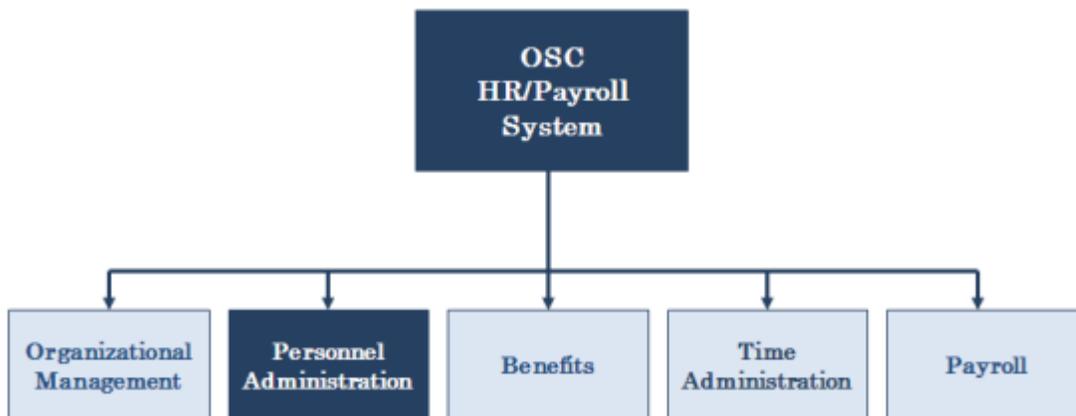
Pre-requisites

- VC101 - Virtual Classroom Overview

There is one prerequisite that you must take before attending this course. Taking 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 Disciplinary Actions* course.

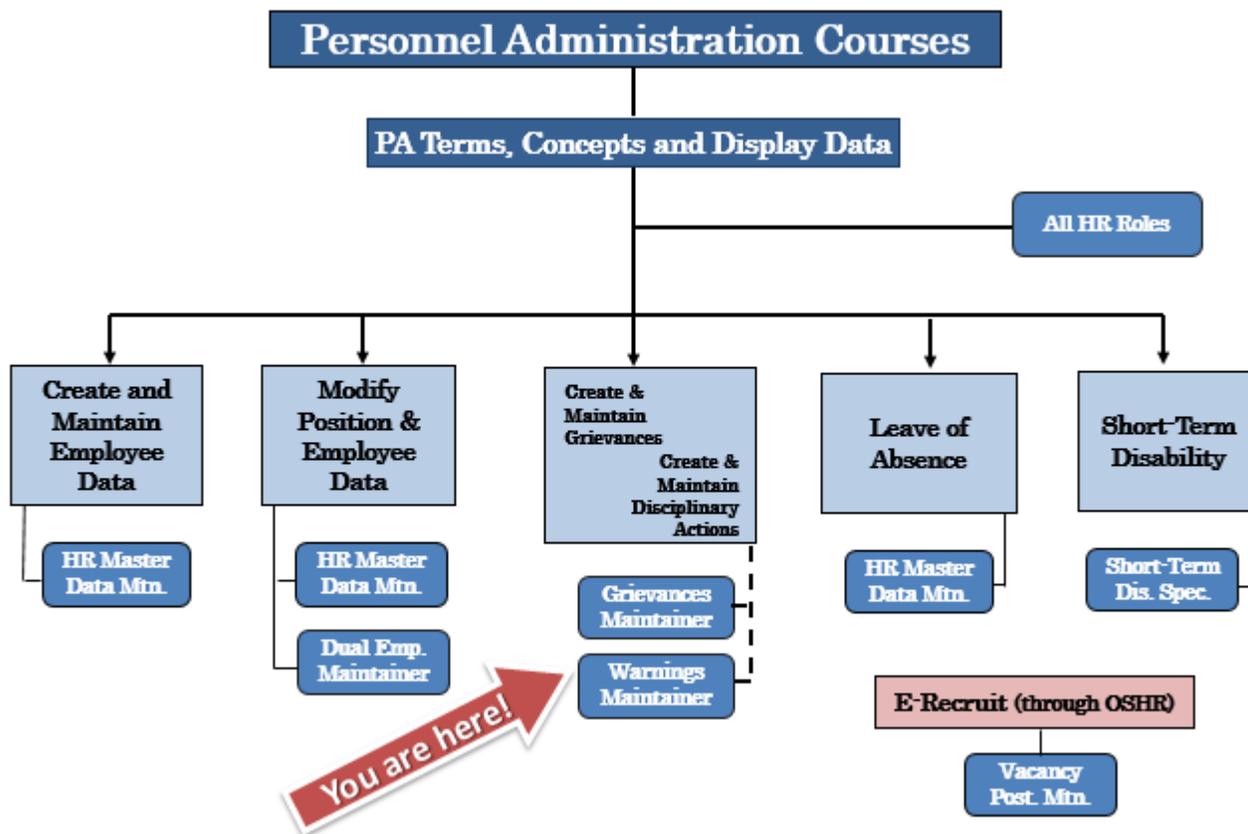
- *Virtual Classroom Overview* (VC101) is an instructor-led course taught via the Internet.

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 determines 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.

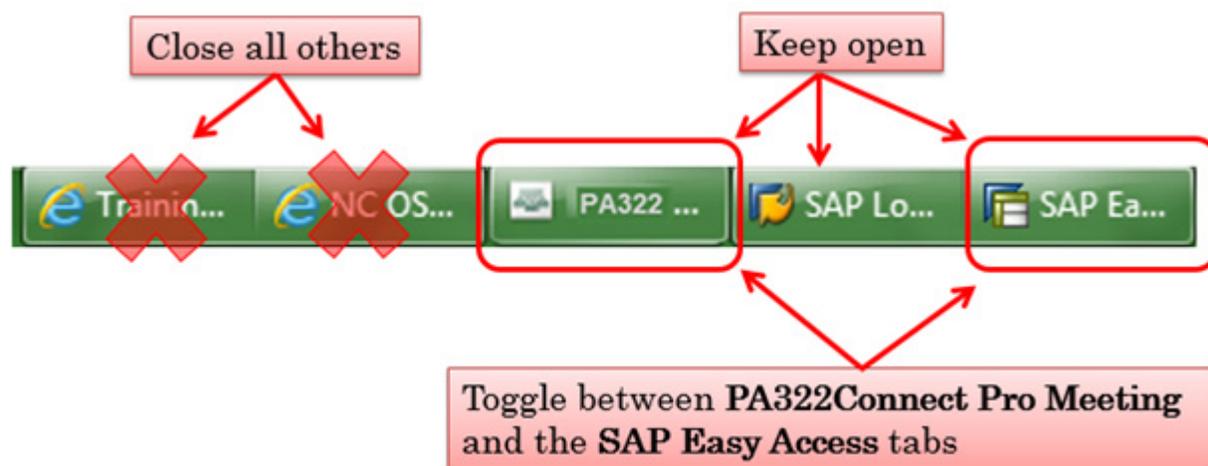
Let Me (Exercises)

- 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

Performing Class Exercises



As discussed in *Virtual Classroom Navigation - VC101*, to perform exercises in a virtual class, you will navigate back and forth between the SAP application and the Adobe Connect application. You will close some of the icons that display on your taskbar to make it less confusing about which icons to use.

Look at the bottom of your screen now and you should see two icons:

- PA322 Connect Pro Meeting
- SAP Easy Access screen

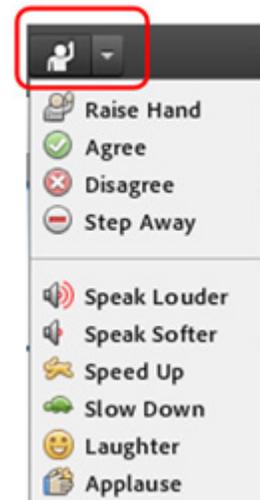
You will leave both of these open during the course. If you have other applications open, you should close them now.

Click the green check to let the Instructor know you see these two icons on your taskbar.

After you complete a Virtual class exercise in the HR/Payroll system training client:

- Access the **PA322 Connect Pro Meeting** from your taskbar.
- In the Participant’s panel, click the **green check**  icon.
- Leave the **green check**  active -- the instructor will clear it.

By using the green check to indicate you have completed an exercise, the instructor can see at a glance those students who may need additional time.



Instructor Demonstration

In this demonstration, the instructor will log on to the HR/Payroll system training client, enter the user name and password, and access the Easy Access screen.

After the Easy Access screen is accessed, notice that the Training Center icon title is now **“you are viewing Virtual Instructor’s application”** (instead of Training Center).

 *Note to instructor:* Until you reach the Easy Access screen, the system doesn’t recognize that you are in the same application when the screen changes. Click the “select application” again from the Sharing icon. After you reach the Easy Access screen, this will no longer be an issue.

PRE-CLASS EXERCISE: Logging on to the HR/Payroll System

SCENARIO

You need to log into the HR/Payroll system. Use the steps below to log into the system

Instructions

1. Use the task bar to open a new Internet window.
2. Access the **HR/Payroll system portal** using your own User ID and password.
3. Click the Training GUI.
4. Click Training Sandbox client E1T 899. The SAP Easy Access screen displays.
 - If necessary, enter your own user ID and password again.
5. On the taskbar, **leave open** the **SAP Easy Access** screen and the **PA322 Connect Pro Meeting** tasks; **close** all other tasks.
6. Click the **PA322 Connect Pro** task on your taskbar to return to the PA Virtual Class.
7. Click the green check icon to let the Instructor know you have successfully logged on. The Instructor will remove the check.

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: Terms, Concepts, and Infotypes Overview
- Lesson 2: Create and Maintain a Disciplinary Action Record
- Lesson3: Course Review

The *Maintain Disciplinary Actions* 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.

Course Objectives

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

- Define key terms and concepts
- Describe the OSC HR/Payroll system Disciplinary Action processes
- View, create and maintain a Disciplinary Action
- Identify how to access the Disciplinary report

Reference Materials

- Student Guide
- Job Aids
- Other Resources
 - *What's New*
 - Online help - from the SAP portal
 - Work instructions - Business Process Procedures (BPPs)

The materials above can be accessed through the OSC Training HELP website. Use the following link to access the HELP website:

<http://www.osc.nc.gov/training/osctd/help/>

SUMMARY

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

Terms, Concepts and Infotypes Overview

Introduction

Lesson 1: Terms, Concepts and Infotypes Overview

Lesson 2: Create and Maintain a Disciplinary Action Record

Lesson 3: Course Review

Lesson 1 Objectives

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

- Identify who can see IT0102; subtype 3
- Identify the transaction codes used to maintain a Disciplinary Action record
- Identify the applicable infotype and subtypes
- Discuss how to create a reminder to follow-up on a Disciplinary Action
- Identify the various functions used to view or maintain Disciplinary Action records
- Discuss the application of validity periods and how records are ended

PA30 - Maintain Master Data

You may recall from *Personnel Administration Terms, Concepts and Display Data* (PA210), transaction code PA20 is used to view individual infotypes. PA30 is the transaction code used to create and maintain Disciplinary Actions. There are several options available when you access PA30 which include:

- **Tabs:** The infotypes are grouped together by subject matter on a Tab menu. Simply select the Tab you want to access or use the display All tabs button. After you select the appropriate tab, you may have to scroll to find the specific infotype.
- **Period:** You have various options regarding the time frame you wish to use when displaying an infotype. Some infotypes will only display if the All option has been selected.
 - 📁 **NOTE:** When displaying records, no change is necessary to the period selection.
- **Direct Selection:** You can either enter the infotype code and subtype in the Direct Selection field or use the matchcode to search for the infotype and subtype.
 - 📁 **NOTE:** PA20 can be used to only view (not maintain) the employee's prior Disciplinary Action history.

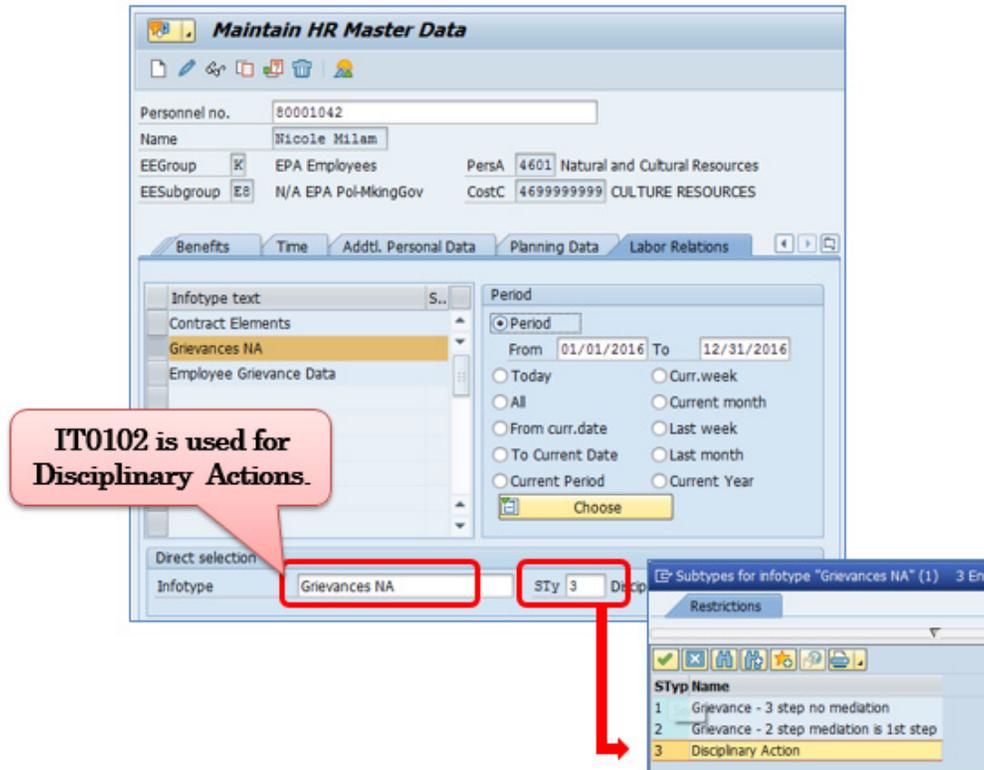
Who can see IT0102; subtype 3?

Users with the following roles can view IT0102; subtype 3;

- Warning Maintainer
- Warning Display

You will be able to see anyone within your structural authorization.

Infotype for Disciplinary Actions



As indicated in a previous course, employee master data is organized into **infotypes** or screens of data. Some infotypes have additional screens, called **subtypes**. Infotypes and subtypes are important concepts in the Disciplinary Actions process.

The Grievance NA (IT0102) infotype stores Disciplinary Actions. Choose the subtype to enter a Disciplinary Action.

As shown above, after you access the Grievances NA (IT0102) infotype, you will always choose **3 - Disciplinary Action** in the subtype field.

Monitoring of Tasks (IT0019)

After a Disciplinary Action is saved, the HR/Payroll system automatically presents IT0019.

Task Type

Date of Task

Reminder Date

Lead/Follow-up time

Comments

Create Monitoring of Tasks (0019)

Personnel No: 80001042 Name: Nicole Milan

EEGroup: X EPA Employees PersA: 4601 Natural and Cultural Resources

EESubgroup: E8 N/A EPA Pol-MkingGov Statu: Active

Task

Task Type: Other

Date of Task: 01/05/2016 Processing Indicator: New task

Reminder

Reminder Date: 12/05/2015

Lead/follow-up time: For specific task type

Comments

text

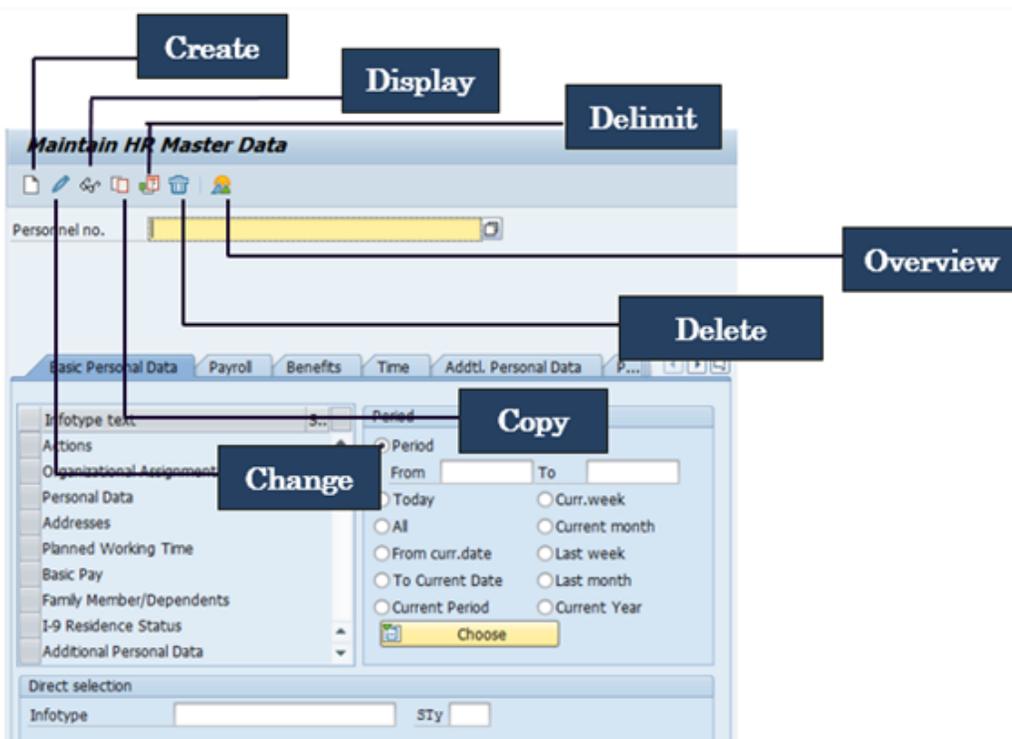
Additional text icon displays after comments are written

The Monitoring of Tasks IT0019 displays automatically as part of the Disciplinary Action process.

In a previous course IT0019 was described like a tickler file that is date driven. A report is run to see which employees have transactions coming due soon. Run BOBJ report B0099 or the Date Monitoring report (S_PH0_48000450) in the HR/Payroll system to view the various tasks due. If the task is completed prior to the due date entered, it will still display on the Date Monitoring report unless you change the end date of the Monitoring of Tasks infotype.

 **NOTE:** You will only create this infotype if Management has stated they will review prior to the end-date.

Description of Buttons



There are several ways to Maintain Master Data as listed below.

- **Create:** Create a new infotype for an existing employee.
- **Change:** You can correct/revise using the Change (pencil) function.
 - 📁 **NOTE:** Infotype 0102 is the only infotype on which you should use the Change (pencil) function.
- **Delete:** Eliminate a record.

You must contact BEST Shared Services to delete an IT0102 – Grievances NA record. Per OSHR, Disciplinary Actions should not be deleted for ANY reason.
- **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. You must 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.

Copy and Change Options

Copy: Create another record to ensure that history is maintained. Unlike other Personnel Administration infotypes, you cannot use the Copy function with the same dates to correct errors.

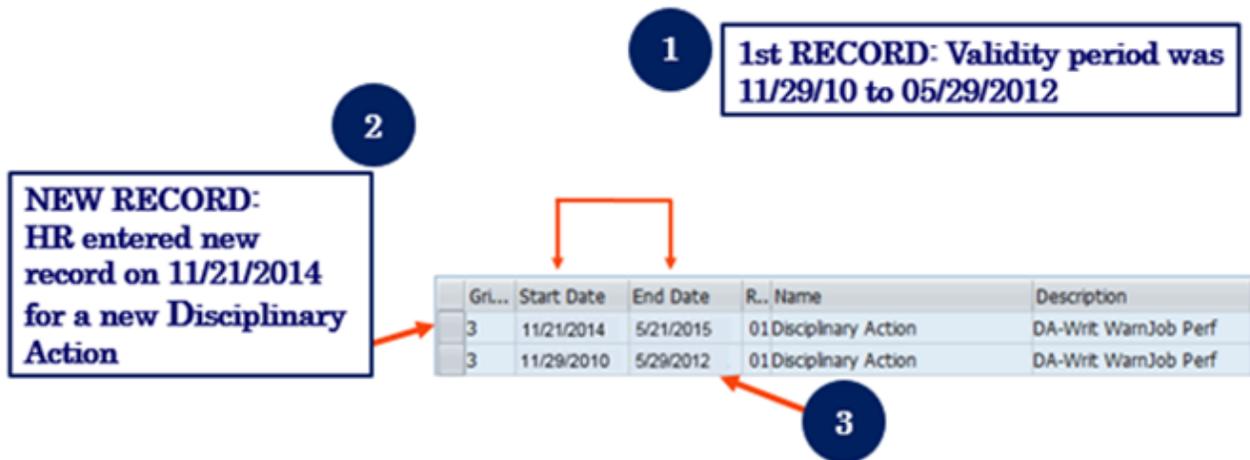
Change (pencil): **Be extremely careful** when using the Change function. Unlike other Personnel Administration (PA) infotypes, it is sometimes necessary to use Change to correct errors in IT0102. If you used the Copy function instead of Change, you will create another record, even though you are using the same effective date.

You can only correct a current (not historical) record. Only BEST Shared Services can make changes to historical records.

Please note that permission is granted to only use the Change function on IT0102.

The rule that you are to use the Copy function and never the pencil for all other PA infotypes is still applicable.

Entering End Dates



All records must have a beginning (start) date and an ending date, a time span that is called the **validity period**. When an end date is entered, the record is **delimited** (no longer active). For Disciplinary Actions, the end date will **always be manually entered** by the Maintainer.

📁 **NOTE:** In other HR functions, the end date can either be automatically created by the HR/Payroll system when a new record with a new effective date is entered or entered manually by HR. The ending date on IT0102 is entered as follows:

- **Disciplinary Action:** Enter the effective date in the “Start” date, and 18 months later in the “to” date. If a subsequent DA occurs, change end date of previous DA records to new end date of current record.

📁 **NOTE:** If an employee has an active disciplinary action and incurs an additional one, the first DA end date must be changed to the same end date of the new DA.

📁 **CRITICAL NOTE:** It is crucial to understand the concept of validity periods, how history is preserved and when it is applicable to apply the end date.

KNOWLEDGE CHECK

Question	Answer
1. All records must have a beginning (start) date and an ending date, a time span that is called the ____.	
2. Infotype ____ is the only infotype on which you should use the Change (pencil) function.	
3. You must contact ____ to delete an IT0102 – Grievances NA record.	
4. Per ____, Disciplinary Actions should not be deleted for ANY reason.	
5. The security roles that have access to IT0102; subtype 3 are ____ and ____.	

SUMMARY

In this lesson you learned to:

- Identify who can see IT0102; subtype 3
- Identify the transaction codes used to maintain a Disciplinary Action record
- Identify the applicable infotype and subtypes
- Discuss how to create a reminder to follow-up on a Disciplinary Action
- Identify the various functions used to view or maintain Disciplinary Action record
- Discuss the application of validity periods and how records are ended

Create and Maintain a Disciplinary Action Record

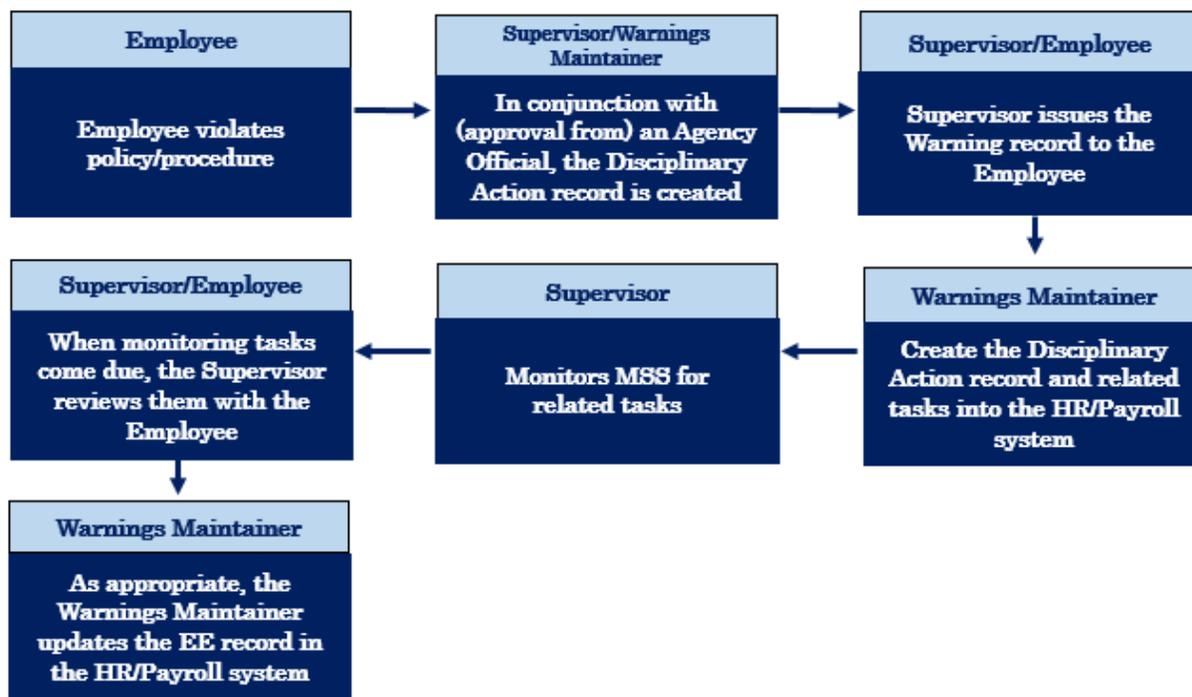
Introduction
Lesson 1: Terms, Concepts and Infotypes Overview
Lesson 2: Create and Maintain a Disciplinary Action Record
Lesson 3: Course Review

Lesson 2 Objectives

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

- Describe the Disciplinary Action process flow
- Identify the infotype and subtype used to enter a Disciplinary Action
- Create and maintain a Disciplinary Action and enter an end date
- Identify how to access the Disciplinary Action report

Generic Disciplinary Action Process by Role



The above graphic shows a high-level overview of the Disciplinary Action process and the steps taken by each party within the process. The Warnings Maintainer enters data when applicable into the HR/Payroll system by using:

- Transaction code PA30
- Infotype IT0102 NA Grievances
- Subtype 3 – Disciplinary Actions

 **NOTE:** To display (instead of maintaining) a record, use either the Display (glasses) or Overview (mountain) icon in transaction code PA20. Viewing in PA30 can lock the record.

Disciplinary Actions

Disciplinary Actions are:

- Initiated by the Manager/Supervisor (Approved by Agency HR)
- A component of the disciplinary process
- Documented via a subtype of the Grievance Infotype 0102
- Associated with an applicable reason
- Always enter 18 months unless documented otherwise

Disciplinary actions are a part of the disciplinary process and when administered, could lead to a written warning up to a potential separation of an employee. Disciplinary Actions last for a period of 18 months; however, with justification and agency approval, the length of the period can be modified.

After you access the infotype (IT0102) and subtype (0003) Disciplinary Action), select the applicable reason for the Disciplinary Action.

See the Job Aid at the OSC Training HELP website for details about creating and maintaining a Disciplinary Action record.

Additional Resource

Refer to the following website for more information about creating and maintaining a Disciplinary Action record:

<http://www.osc.nc.gov/training/osctd/help/>

Follow this path to access the latest version of the Disciplinary Action Job Aid:

Personnel Administration > Job Aids > Disciplinary Action Job Aid

EXERCISE 2.1: Create a Disciplinary Action Record

Do not do anything in the system at this time...just follow along with the scenario below!

Take notes as you watch your instructor demonstrate the process.

SCENARIO

Joel Garza has a pattern of tardiness. Last month, for example, the employee was tardy a total of 6 days. The employee has been coached and has received a documented counseling session. So far this month, the pattern has continued with the following: 6th--15 min. late; 7th--30 min. late; 13th--30 min. late; 15th--45 min. late; 20th--15 min. late; and 22nd--1 hour late. The employee's supervisor, Susan Castro, has issued a written warning for job performance. The warning letter stated the record would be reviewed in 90 days to see if the employee has corrected the issue and maintained corrective action.

Instructions

If you wish, access the Job Aid located on the Training HELP page to assist with this process. Go to: <http://www.osc.nc.gov/training/osctd/help/> and then to the *Personnel Administration folder > Create / Maintain Disciplinary Actions.*

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

PERSONNEL #: <i>Joel Garza</i>							
A	80000611	F	80000616	K	80000621	P	80000626
B	80000612	G	80000617	L	80000622	Q	80000627
C	80000613	H	80000618	M	80000623	R	80000628
D	80000614	I	80000619	N	80000624	Inst 1	80000629
E	80000615	J	80000620	O	80000625	Inst 2	65002030

2. Complete the following fields:

Field	Value
Personnel no.	Enter the personnel number from the table above based on student ID your instructor assigns you. Click Enter on the keyboard to validate your entry.
Infotype	0102 - Grievances NA
Subtype	3 - Disciplinary Action

3. Click or press **Enter** on the keyboard to validate your entry.

4. Click the **Create**  button to begin a new Disciplinary Action record. Observe that the infotype name begins with *Create*.
5. Complete the following fields:

Field	Value
Start	Today's date minus one week
End	18 months from the Start date you just entered
Subtype	3 - (This field should populate from the initial screen)
Reason	01 - DA Written Warning Job Performance
Grievance Number	Leave blank (can be used at Agency discretion)
Date Entered	Today's date (although the supervisor issued the Disciplinary Action a week ago, it was not entered into the HR/Payroll system until today.)
Supervisor	80000610 (Susan Castro)

 The remaining fields on the screen are only used for the Grievance Action.

6. On the menu at the top of the screen, click **Edit > Maintain Text**. An Infotype Text box is displayed.
7. Type the following text in the box:

<Your name / date entered>
Mr. Joel Garza PERNR # <BEACON PERNR #> received a Written Warning for Unsatisfactory Job Performance for Time and Attendance violations due to his pattern of absences.
8. Click the **Save**  button to save your comments. You are returned to the Create Grievances NA (0102) infotype screen.
9. Click or press **Enter**  to validate your changes.
10. Click **Save**  to save your changes. The Monitoring of Tasks (IT0019) screen is displayed.

Field	Value
Task Type	90 days (in this scenario because the supervisor agreed to review the employee's behavior in 90 days).
Date of Task	Start date + 90 days. Press Enter . Observe that the Reminder Date field automatically populated to a default time frame. Either highlight and change the date as applicable, or use the Lead/follow-up time fields.
Reminder Date	Accept default.  NOTE: You can "re-program" the reminder date by using the 3 boxes in the Lead/Follow-up fields.

<p>Comments</p>	<p> NOTE: Since the comments do not wrap at the end of the line, use the Edit > Maintain Text function located on the menu bar to add the comments below to the infotype. Remember to start any comments with your name and the date. Also, in your work environment, your notes would probably be more detailed than those shown below, which condensed for brevity to expedite training.</p> <p>Enter the following text:</p> <p><i><Your name / date entered> Mr. Joel Garza PERNR # <BEACON PERNR #> Written Warning dated <date> supervisor Gina Welch will review his record in 90 days to see if his issue has been corrected. Check with <Supervisor's name> to see if the Written Warning should be delimited or continued for the full 18 months.</i></p>
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11. Click **Enter**  to validate your comments.
12. Click **Save**  to save your comments.
13. Click **Save**  to save your changes.
14. Click **Back**  until you return to the SAP Easy Access screen.
15. Click the **PA322 Connect Pro Meeting tab** on your taskbar to return to the Connect Pro Meeting.
16. Click the **Green Check**  to let the instructor know you have completed the exercise.

----- **IT'S YOUR TURN.** -----

Go back to Step 1 above and complete the exercise your instructor just demonstrated.

QUESTIONS -----

Answer the following questions:

Question 1

What term is defined by the following statement? When a record is created, it must have a beginning or start date and an ending date, which is called a ____.



This exercise is complete.

EXERCISE 2.2: Correct a Disciplinary Action Record

Do not do anything in the system at this time...just follow along with the scenario below!

Take notes as you watch your instructor demonstrate the process.

SCENARIO

A mistake was made when the Disciplinary Action was entered on the employee's record. The wrong supervisor was entered. Correct the previous entry by entering the correct supervisor's personnel number.

NOTE: Change will overwrite the previous data. There will not be a history of the previous (incorrect) transaction.

CAUTION: Be aware that using the Pencil icon in IT0102 and IT9834 is the exception for correcting errors in Personnel Administration (PA). Except for IT0102 and IT9834, you do not use the Pencil icon to correct errors in other PA infotypes. In other PA infotypes, the Copy function (with the same effective date) is used to correct errors.

Instructions

If you wish, access the Job Aid located on the Training HELP page to assist with this process. Go to: <http://www.osc.nc.gov/training/osctd/help/> and then to the *Personnel Administration folder* > *Create / Maintain Disciplinary Actions*.

SCENARIO A

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

PERSONNEL #: <i>Joel Garza</i>							
A	80000611	F	80000616	K	80000621	P	80000626
B	80000612	G	80000617	L	80000622	Q	80000627
C	80000613	H	80000618	M	80000623	R	80000628
D	80000614	I	80000619	N	80000624	Inst 1	80000629
E	80000615	J	80000620	O	80000625	Inst 2	65002030

- Complete the following fields:

Field	Value
Personnel no.	Use the same employee assigned to you in the previous exercise. (see table above) Press Enter on the keyboard to display the employee's record. Pressing Enter allows you to see that the numerical codes you entered are correct.
Infotype	0102 - Grievances NA
Subtype	3 - Disciplinary Action

- Click or press **Enter** on the keyboard to validate your entry.
- Click the **Change**  button. Observe that the name of the infotype begins with "Change". By selecting Change, you are overriding (erasing) the previous error so there is no history that an error had been made.
- Enter **80000510** (Tiffany Lawrence) in the Supervisor field
- Click or press **Enter**  to validate your changes.
- Click **Save**  to save your changes. A message displays at the bottom of the screen indicating the record is changed.
- Click the **PA322 Connect Pro Meeting tab** on your taskbar to return to the Connect Pro Meeting.

SCENARIO B

Assume you want to display the historical record of all disciplinary actions associated with the employee.

- Use either **Display** or **Overview** to review the disciplinary action infotype.
- Click **Back**  until you return to the SAP Easy Access screen.
- Click the **Green Check**  to let the instructor know you have completed the exercise.

----- IT'S YOUR TURN. -----

Go back to Step 1 above and complete the exercise your instructor just demonstrated.

QUESTIONS -----

Answer the following questions:

Question 1

When would you change a record versus creating one?



This exercise is complete.

Inactivate versus Removal

Employees or supervisors can request that a Disciplinary Action be rendered inactive in an employee’s personnel file based on performance. Rendering a record inactive in the HR/Payroll system does not mean that it is literally removed from the record. The Warnings Maintainer “delimits” (puts an end date) on the record. Anyone who has security access to the employee’s file can still see the record in the system.

Before a record is delimited, the employee’s performance is evaluated by management to determine if the request to render the Disciplinary Action inactive is warranted. If a decision is made to render the Disciplinary Action inactive, the Warnings Maintainer uses PA30, infotype IT0102, subtype 3 and delimits the record. The Warnings Maintainer also delimits IT0019 - Monitoring of Tasks when applicable (still using PA30).

Disciplinary Actions should not be deleted for any reason!

 **CRITICAL!** It is extremely important to get clarification when asked to “remove” a record to determine if the manager is merely asking that it be rendered inactive rather than actually deleted. Follow your agency’s process for removing a Disciplinary Action which involves contacting BEST Shared Services for assistance with the removal.

EXERCISE 2.3: Delimit (Change) a Disciplinary Action Record

Do not do anything in the system at this time...just follow along with the scenario below!

Take notes as you watch your instructor demonstrate the process.

SCENARIO	
<p>Assume it is now 90 days from the date you previously used for the Written Warning. Joel Garza (from the previous exercise) and the supervisor met today to see if Joel has corrected his tardy behavior. Joel also asked that the written warning letter be rendered inactive.</p> <p>The Supervisor, Gina Welch, Director of Communications, has agreed that the warning can be closed (made inactive) since the employee has maintained corrected behavior. Delimit the employee's Disciplinary Action effective today. (<i>HINT:</i> Today is 90 days after the effective date of the previous exercise.)</p>	

 **NOTE:** Paper documentation is required to support changes and/or delimits.

Instructions

If you wish, access the Job Aid located on the Training HELP page to assist with this process. Go to: <http://www.osc.nc.gov/training/osctd/help/> and then to the *Personnel Administration folder > Create / Maintain Disciplinary Actions.*

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

PERSONNEL #: <i>Joel Garza</i>						
80000611	F	80000616	K	80000621	P	80000626
80000612	G	80000617	L	80000622	Q	80000627
80000613	H	80000618	M	80000623	R	80000628
80000614	I	80000619	N	80000624	Inst 1	80000629
80000615	J	80000620	O	80000625	Inst 2	65002030

2. Complete the following fields:

Field	Value
Personnel no.	Use the same employee assigned to you in the previous exercise. (see table above) Press Enter on the keyboard to display the employee's record. Pressing Enter allows you to see that the numerical codes you entered are correct.
Infotype	0102 - Grievances NA
Subtype	3 - Disciplinary Action

3. Click or press **Enter** on the keyboard.
4. Click the **All** period. (This enables you to see all the IT0102 records for this employee.)
5. Click the **Change**  button.
6. Change the **To date** (the end date) to the 90-day date.

7. Click **Enter** .
8. Go to **Edit > Maintain text** to update notes as follows:

<Your name / date entered>

Mr. Joel Garza PERNR # <BEACON PERNR #> met with Gina Welch, Director of Communications, on <date met - the day before the 90 days> to review his record to see if his issue has been corrected. Gina Welch agreed to render the Written Warning inactive effective <date met>.

9. Click **Enter** .
10. Click **Save**  to save your comments.
11. Click **Save**  to save your record.
12. Select the **Overview**  button to see that the record is delimited (changed) the day you entered the change. It is still viewable for anyone with security access to see—it just is not active any longer.

 **NOTE:** Because the Monitoring of Tasks infotype was set at 90 days, and this review has happened at 90 days, you do not need to delimit IT0019. Tasks no longer display on the Date Monitoring report after the effective date has passed.

13. Click the **PA322 Connect Pro Meeting tab** on your taskbar to return to the Connect Pro Meeting.
14. Click the **Green Check**  to let the instructor know you have completed the exercise.

----- IT'S YOUR TURN. -----

Go back to Step 1 above and complete the exercise your instructor just demonstrated.

Deleting a Record

If you are asked to delete a record in the HR/Payroll system, you must first ensure that you have proper documentation that warrants the deletion. Contact BEST Shared Services to request for a record to be deleted for a grievance or disciplinary action.

QUESTIONS -----

Answer the following questions:

Question 1

Can an employee have multiple Disciplinary Actions?

❖

Question 2

List two of the various criteria that would warrant BEST HR to delete a record.

❖

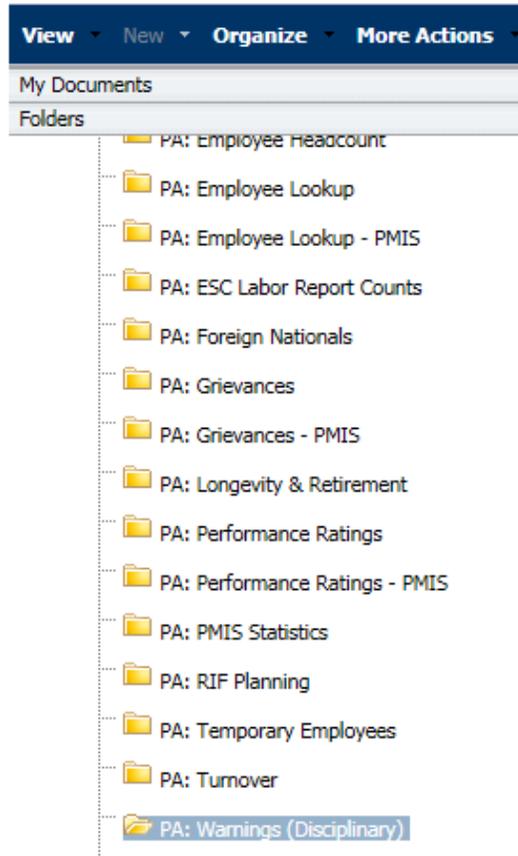
❖

This exercise is complete.

Reporting

The Disciplinary Warnings report is a BOBJ (Business Objects) Report and is available for use.

	Title ^	Type
	B0051: Disciplinary Warnings	Web Intelligence



KNOWLEDGE CHECK

Question	Answer
1. The ___ icon will overwrite the previous data.	
2. Follow your agency’s process for removing a Disciplinary Action which involves contacting ___ for assistance with the removal.	
3. If a decision is made to render the Disciplinary Action inactive, the Warnings Maintainer uses PA30, infotype IT0102, subtype 3 and ___ the record.	

SUMMARY

In this lesson you learned to:

- Describe the Disciplinary Action process flow.
- Identify the infotype and subtype used to enter a Disciplinary Action.
- Create and maintain a Disciplinary Action and enter an end date.

Course Review

Introduction
Lesson 1: Terms, Concepts and Infotypes Overview
Lesson 2: Create and Maintain a Disciplinary Action Record
Lesson 3: Course Review

Course Objectives

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

- Define key terms and concepts
- Describe the OSC HR/Payroll system Disciplinary Action process
- View, create and maintain a Disciplinary Action record
- Identify how to access the Disciplinary report

HR/Payroll System Integration



Because OSC HR/Payroll is an integrated system, entries made in one module affect other system components, such as an employee's time and pay.

Some infotypes entered are tied directly to the employee, like work weeks, schedules, addresses, and tax withholding information. Other infotypes are applied to the position and affect things like how OSC HR/Payroll looks at holidays, overtime, and premium pay. OM, PA, BN, and TM settings all can affect an employee's paycheck.

Listen as your instructor explains how the Personnel Administration module integrates with the other the HR/Payroll system modules.

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 on the BEACON website. 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 evaluation of today's class in the Learning Management System (LMS).

When you have completed the class, you may:

- Hang up the phone
- Exit the virtual classroom

CONGRATULATIONS!

You've completed the course!