

Transactions

- ZPAA076
- SWBP
- PA40

**PA BPP****CAREER PROGRESSION ACTION****Change Record:**

Change Date: 1/10/2012	Changed by: w. creech
Changes:	<p>Combine Initiate & Complete</p> <p>Step 7: New text added</p> <ul style="list-style-type: none"> • <i>If the employee is hourly, you will leave the annual salary field blank and only complete the hourly salary field.</i> <p>Step 26: New text added</p> <ul style="list-style-type: none"> • The effective date is the date the Demotion will go into effect. <i>This date must match the effective date on the PCR.</i> <p>Step 31: New Caution statement added</p> <ul style="list-style-type: none"> • <i>If the contract field is completed on the previous IT0001, it will copy to the new IT0001.</i>

Trigger:

There is a need to process a Career Progression for one of the reasons listed in the Business Process Procedure Overview section.

Business Process Procedure Overview:

Career Progression – Pay factors support a salary adjustment and/or competency level adjustment within the pay range of the employee’s career-banded class, in conjunction with the employee’s attainment and demonstrated use of competencies in same position.

02 - CP-Comp/Skill - Pay factors support a salary adjustment within the pay range of the employee’s career-banded class competency level, in conjunction with the employee’s attainment and demonstrated use of competencies in the same position at the same overall competency level. The employee’s overall competency level will not change. (If salary adjustment is not granted due to funding issues, an action is not processed.)

05 - CP-Labor Market – An employee’s salary is low in relation to market guidelines applicable to the employee’s competencies, and a salary adjustment 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; removal of an internal equity/pay alignment issue that had prevented an employee from being paid at appropriate competency rate.

06 - CP-Comp Level Change – Employee’s overall competency level is changing as a result of the employee’s attainment/assignment and demonstrated use of competencies at a higher or lower overall competency level within the same banded class. The pay factors may support an increase, decrease or no change in salary. (Note: change in overall competency level that results from disciplinary action shall be coded as a Demotion)

08 - Broad Band Level Change – a change in the level to which an employee is assigned. (Used for pilot banded employees.)

10 - Broad Band Job Change – Transfer of an employee from one banded occupational group to another banded occupational area. May or may not involve position number and salary change. Object id must change. If salary change is involved, include in the comment, reason for the adjustment and justification for any increase exceeding 10%. (Used for pilot banded employees.)

11 - Salary Adjustment Fund – A salary increase, provided through approved use of salary adjustment funds, granted to career-banded employees whose salary upon transfer from the graded system to the banded system is less than allowed by the career-banding salary administration policy (Requires OSP approval).

03 - 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”.

NOTE: The “N/A Grade Band Transfer” reason is no longer an option for Career Progression action. Please refer to the Transfer action BPP.

Tips and Tricks:

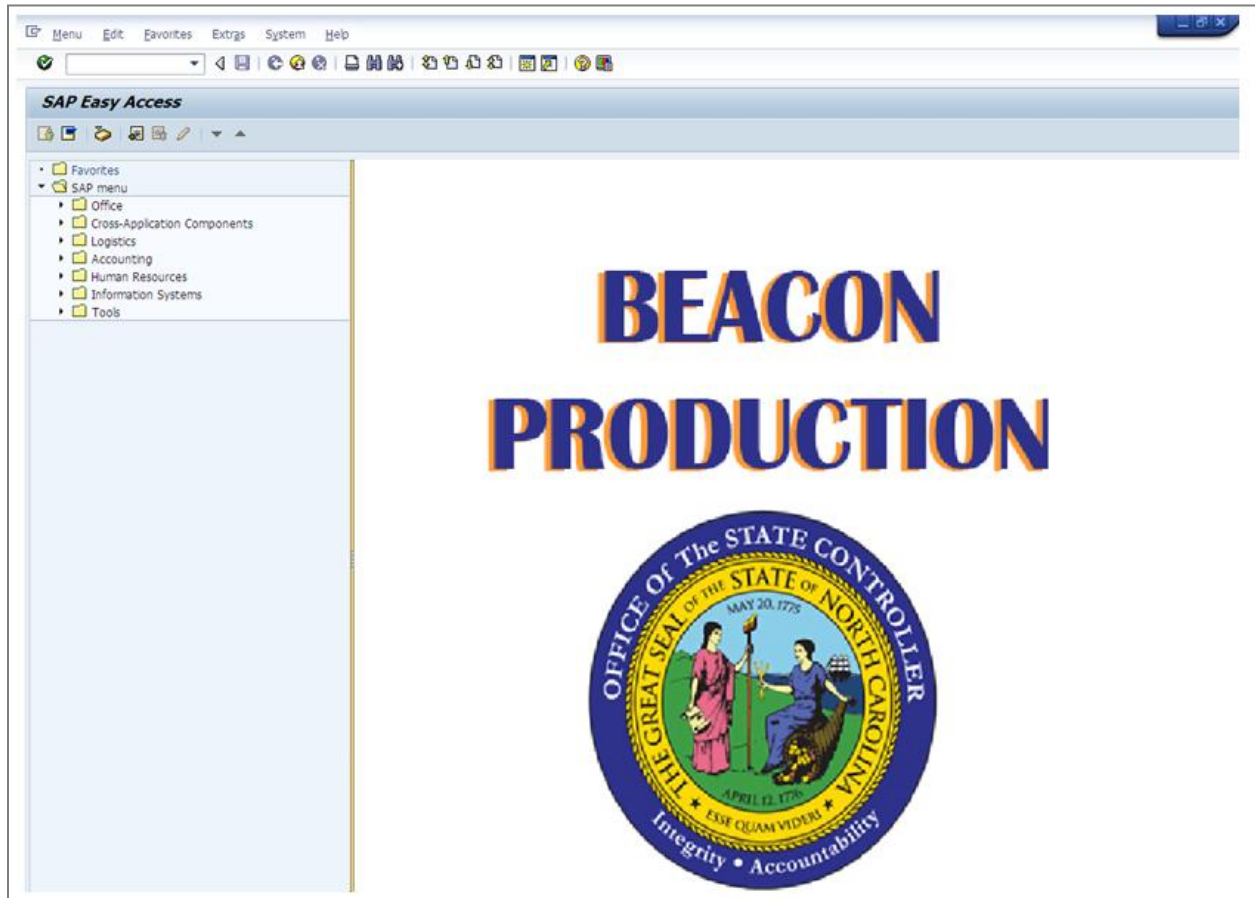
Prior to initiating any workflow, ensure the data being used is valid and appropriate.

See the **PA Tips and Tricks Job Aid** for a fuller listing of Best Practices and Tips & Tricks. The job aid is located on the Training Help website <http://www.osc.nc.gov/training/osctd/help/> in the following folder: *Personnel Administration > Job Aids.*

Access Transaction:

Via Menu Path:	Your menu path may contain this custom transaction code depending on your security roles.
Via Transaction Code:	ZPAA076; SWBP; PA40


PROCEDURE



1. Update the following field:

Field Name	Description	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	Enter value in Command. Example: ZPAA076

2. Click the **Enter**  button.

 **Information**

You may want to enter this transaction code in your Favorites folder.

- Choose Favorites > Insert Favorites
- Type in ZPAA076
- Click Enter.

To see the transaction code displayed in front of the link in your favorites:

- Choose Edit > Settings
- Place a check next to Display Technical Name
- Click Enter

Employee Action Request

Existing PCR No.

Personnel No. Wanda Hill

Last 4 digits (SSN) First Last

Effective on 09/01/2011

Action Type ZH Career Progression (NC)

Reason 02 CP-Comp/Skill

3. Update the following fields:

Field Name	Description	Values
Personnel No.	Unique employee identifier	Enter value in Personnel No. Example: 80000489
Effective on	The date on which the action will be effective	Enter value in Effective on. Example: 09/01/2011
Action Type	An action is a grouping of activities to perform a specific task. The action will prompt you for the Infotypes required to complete the task.	Enter value in Action Type. Example: ZH
Reason	Reason for the action, such as CP-Comp/Skill	Enter value in Reason. Example: 02

4. Click the **Enter** button.

Enter the Personnel Number of the individual to receive the Career Progression. Click **Enter** to retrieve the name of the individual and verify you have the correct Personnel Number.

If you need to look up the personnel number, click your cursor in the field and click on the matchcode search button to the right of the field for search options.

The system defaults the current date, but you may change the date to a day in the past or in the future.

There are several available **Reasons** to choose. For specific information on each reason, view the business process overview section at the beginning of these instructions.

Click Enter and verify the information is correct before proceeding.

Existing PCR No.	<input type="text" value=""/>	
Personnel No.	<input type="text" value="80000489"/>	Wanda Hill
Last 4 digits (SSN)	<input type="text" value=""/>	First <input type="text" value=""/> Last <input type="text" value=""/>
Effective on	<input type="text" value="09/01/2011"/>	
Action Type	<input type="text" value="ZH"/>	Career Progression (NC)
Reason	<input type="text" value="02"/>	CP-Comp/Skill

5. Click the **Create (F5)**  button.

If the information is correct, click **Create** to begin the process.

Leave the **Existing PCR No.** field blank if you are creating a new PCR.

Several fields on this screen are mandatory. The system will not let you continue if you have not provided data for the mandatory fields. If you are unsure which fields are mandatory, click Enter, and the system will prompt you for information in the mandatory fields.

Employee Action Request

Initiate WF

PCR Number

Personnel Number 80000489 Wanda Hill Action: ZH Career Progression (NC)

Last 4 digits(SSN) Reason: 02 CP-Comp/Skill

Effective on 09/01/2011 Chng St:

CURRENT		PROPOSED	
Pers.Area	4601 Cultural Resources	Pers.Area	4601 Cultural Resources
Subarea	NC01 7day Norm	Subarea	NC01 7day Norm
EE Group	A SPA Employees	EE Group	A SPA Employees
EE Subgroup	A1 FT N-FLSAOT Perm	EE Subgrp	A1 FT N-FLSAOT Perm
Org. Unit	20013161 CR CDS It	Org. Unit	20013161 CR CDS It
Job	30005025 Networking Analyst	Job	30005025 Networking Analyst
EE Position	65001391 Information Security Officer	EE Position	65001391 Information Security Officer

Basic Pay

Pay Scale type	02 Banded	Pay Scale type	02 Banded
Pay Scale Area	06 Career Banding	Pay Scale Area	06 Career Banding
Pay Scale Group	30005025 Level C	Pay Scale Group	30005025 Level C
Annual Salary	40,525.00	Hrly Sal	0.00
Mkt Index	74.80	Annual Salary	42,551.00
		Hourly Salary	
		Mkt Index	78.54
		Min	41,614.00
		Max	96,174.00
		Next Inc Date	

Dates


Last day worked

6. Update the following fields:

Field Name	Description	Values
Annual Salary	Employee's annual basic pay	Enter value in Annual Salary. Example: 42,551

7. Click the **Enter**  button.

Enter the new position number and the new **annual salary** or **hourly rate**. Click **Enter** to validate the data. If the employee is hourly, you will leave the annual salary field blank and only complete the hourly salary field.

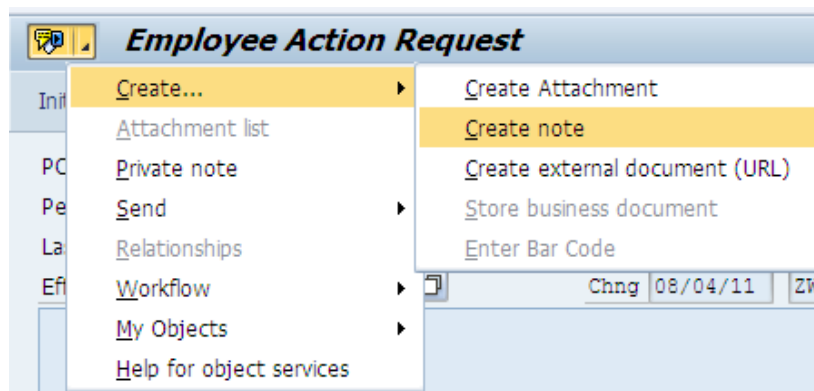
8. Click the **Save (Ctrl+S)**  button.

Click Save to save the data and receive a PCR number. The PCR has not been submitted to workflow yet.



9. Click the **(Enter)**  button.

You may save this information as many times as you like, each time you will receive a confirmation of the save. You will not be able to create a note attachment until you have saved it at least once. If you have already submitted the PCR to workflow, you will not be able to change the details, nor save any new information, only display the existing details.



10. Click the **Services for Objects**  button.

11. Click **Create... >> Create note**.

You may enter any information that would be useful to the approvers downstream using the notes area, or attachment area. If you just need to type some information in, or copy and paste from an email, create a note. If you want to add a document as an attachment, use the attachment area.

Follow the OSP or Agency-specific guidelines on notes and attachments to be added.

The screenshot shows a software window titled "Create note". It has a title bar with a close button. Below the title bar is a text input field labeled "Title of note" which contains the text "Career Progression". Below this is a large text area with a placeholder message: "Enter information as appropriate to support the Career Progression action for this individual." At the bottom right of the window, there are two small icons: a green checkmark and a red X.

12. Update the following fields:

Field Name	Description	Values
Title of note	The short text to act as the title of the attachment	Enter value in Title of note. Example: Career Progression information
Long text	An open text field	Enter value in Long text. Example: appropriate information

13. Click the **(Enter)**  button.

Employee Action Request

Initiate WF

PCR Number: 1000005277
 Personnel Number: 80000489 Wanda Hill Action: ZH Career Progression (NC)
 Last 4 digits(SSN): Reason: 02 CP-Comp/Skill
 Effective on: 09/01/2011 Chng: 09/01/11 ZWFINOMPA031 St: D Created




CURRENT		PROPOSED	
Pers.Area	4601 Cultural Resources	Pers.Area	4601 Cultural Resources
Subarea	NC01 7day Norm	Subarea	NC01 7day Norm
EE Group	A SPA Employees	EE Group	A SPA Employees
EE Subgroup	A1 FT N-FLSAOT Perm	EE Subgrp	A1 FT N-FLSAOT Perm
Org. Unit	20013161 CR CDS It	Org. Unit	20013161 CR CDS It
Job	30005025 Networking Analyst	Job	30005025 Networking Analyst
EE Position	65001391 Information Security Officer	EE Position	65001391 Information Security Officer

Basic Pay

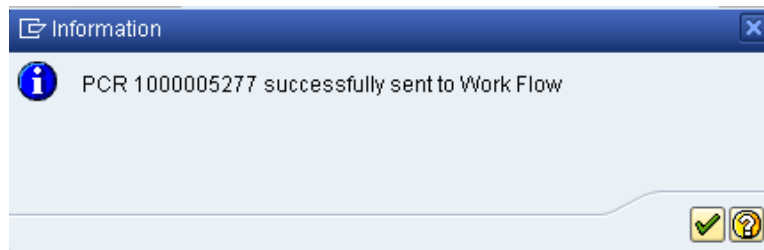
Pay Scale type	02 Banded	Pay Scale type	02 Banded
Pay Scale Area	06 Career Banding	Pay Scale Area	06 Career Banding
Pay Scale Group	30005025 Level C	Pay Scale Group	30005025 Level C
Annual Salary	40,525.00 Hrly Sal 0.00	Annual Salary	42,551.00 Hourly Salary
Mkt Index	74.80	Mkt Index	78.54 5.00
Min	41,614.00	Max	96,174.00
		Next Inc Date	

Dates

Last day worked

14. Click the **Enter**  button.
15. Click the **Save (Ctrl+S)**  button.
16. Click the **Initiate WF**  button.

Select the **Initiate Workflow** button to send the Career Progression Action through the approval process. No changes can be made after the PCR has been submitted for approval, unless the PCR is rejected at any stage and sent back to you (the initiator/requestor).



17. Click the **(Enter)**  button.

Employee Action Request

Existing PCR No.

Personnel No.

Last 4 digits (SSN) First Last

Effective on

Action Type Career Progression (NC)

Reason CP-Comp/Skill

18. Click the **Back (F3)** button.

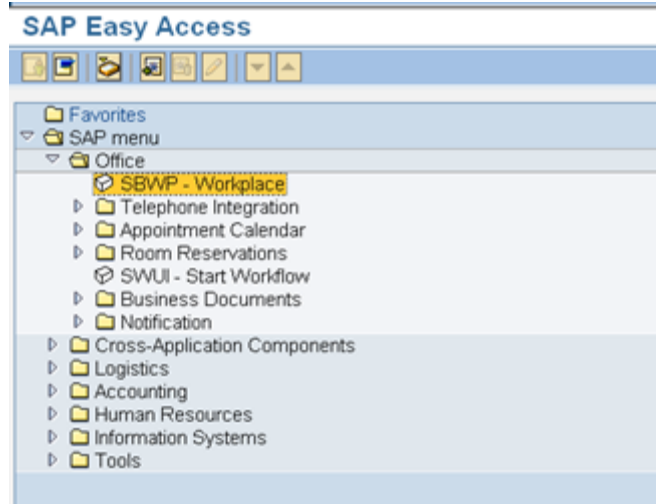
19. The **Initiate Career Progression Action** is complete.

After Workflow Approvals have been received, process with the Complete Career Progression Action process.

Instructions for Completing The Action

Access Transaction:

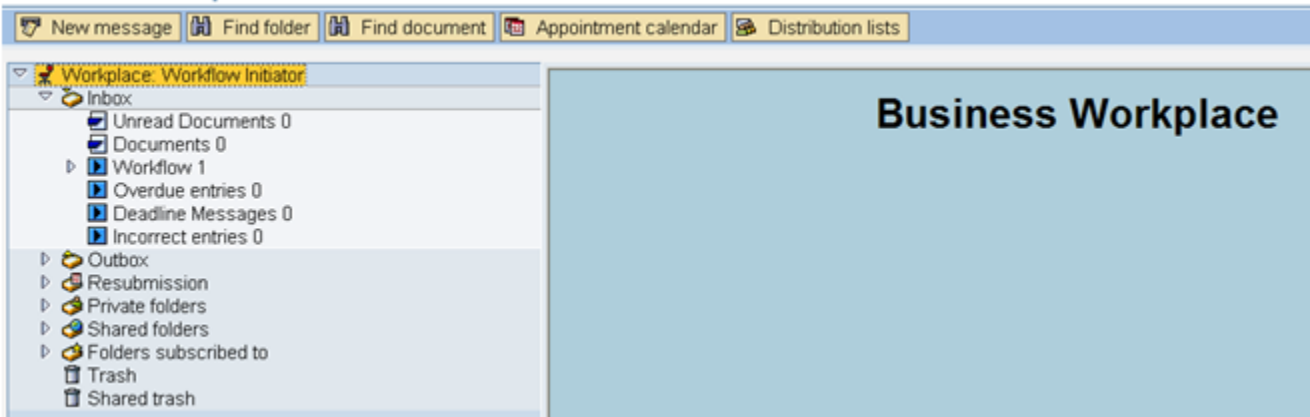
Via Menu Path:	SAP menu ==> Office ==> SBWP - Workplace
Via Transaction Code:	SBWP



20. Click the **SAP Business Workplace (Ctrl+F12)**  button.

These instructions assume you have already initiated the Career Progression Personnel Change Request (PCR) in workflow, and you have an approved PCR ready to be processed as a Career Progression in the system.

Business Workplace of Workflow Initiator



21. Select **Inbox >> Workflow**.

You can process using step 22 or step 23.

22. Select the PCR **4601 Create PA Action - Career Progression (NC) for Wanda Hill - PCR: 1000005277** row.

Double-click on row.

23. Click the **Execute (F8)**  button.

A list of your approved (or rejected) PCR's are listed on the right side of the screen. Select the PCR to be processed and click Execute (or double-click the PCR). You may view the PCR details and/or Workflow Tracker details prior to executing the PCR if desired. Once executing the PCR, the Career Progression action will be launched.

24. Update the following field:

Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From. Example: 09/01/2011

25. Highlight **Career Progression (NC)** action type.

26. Click the **Execute (F8)**  button.

The effective date is the date the Career Progression will go into effect. This date must match the effective date on the PCR.

Copy Actions (0000)

Execute info group Change info group

Pers.No. 80000489
Name Wanda Hill
EEGroup A SPA Employees PersA 4601 Cultural Resources
EESubgroup A1 FT N-FLSAOT Perm
Start 09/01/2011 to 12/31/9999

Personnel action
Action Type ZH Career Progression (NC)
Reason for Action 02 CP-Comp/Skill

Status
Customer-specific
Employment 3 Active
Special payment 1 Standard wage type

Organizational assignment
Position 65001391 Information Security Offi
Personnel area 4601 Cultural Resources
Employee group A SPA Employees
Employee subgroup A1 FT N-FLSAOT Perm

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action


27. Click the **Enter** button.

Record valid from 01/01/2008 to 12/31/9999 delimited at end

The system will provide a yellow warning message informing you the existing record will be delimited. Click Enter past this warning message.

Notice at the top of this screen the title includes the word “Copy”. This action takes the original action and makes a copy of it, delimiting the previous record and saving the new record. The word “Create” in the title indicates that this infotype is being created on this person's record for the first time.

Person and position have different employee groups/subgroups

When the employee subgroup is different from the position employee subgroup you will receive a warning message. Click **Enter**  to continue.


Infotype Text

Enter or paste appropriate comments.

28. Click **Edit, >> Maintain text.**

To add your comment based on agency or OSP Policy/Guidelines. Remember you can cut and paste from the PCR.

29. Click the **Enter**  button.

30. Click the **Save (Ctrl+S)**  button.

Create Organizational Assignment (0001)

Org Structure

Personnel No 80000489 Name Wanda Hill
EEGroup A SPA Employees PersA 4601 Cultural Resources
EESubgroup A1 FT N-FLSAOT Perm Statu Active
Start 09/01/2011 to 12/31/9999

Enterprise structure

CoCode NC01 STATE OF NC
Pers.area 4601 Cultural Resources Subarea NC01 7day Norm
Cost Ctr 4699999999 CULTURE RESOU... Bus. Area 4600 Cultural Resources
Fund 4699999999 CULTURE- SUSP...
Func. Area 600000000000000001 General Government

Personnel structure


EE group A SPA Employees Payr.area 01 NC Monthly
EE subgroup A1 FT N-FLSAOT Perm Contract

Organizational plan

Percentage 100.00 Assignment
Position 65001391 800904000718 Information Security O...
Job key 30005025 Net Ing Anl Networking Analyst
Org. Unit 20013161 48010201200 CR CDS It
Org.key 46014699999999

31. Click the **Enter**  button.




Enter the Contract if required. The Contract key identifies eligibility for Medicare, less than 5 yrs for STD, and the Rehire of Retiree statuses.

 **CRITICAL!** Subject employees must be positive time. Employment percent should always be 100%.

The system will display a yellow warning message informing you the existing record will be delimited. Click **Save** to move pass this warning message.

32. Click the **Save (Ctrl+S)**  button.

Copy Planned Working Time (0007)

   Work schedule

Personnel No Name

EEGroup SPA Employees PersA Cultural Resources

EESubgroup FT N-FLSAOT Perm Statu

Start To

Work schedule rule

Work schedule rule MTWH-9,F-4,SaS-O

Time Mgmt status

Working week

Part-time employee

Working time

Employment percent

Daily working hours

Weekly working hours

Monthly working hrs

Annual working hours


Weekly workdays


33. Adjust their work schedule as appropriate and save the data.

The Work Schedule Rule 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 and verify the working hours are less than 40.

The defaulted work schedule is based on information provided by the various agencies and BEACON team members.

**CRITICAL!** Subject employees must be positive time. Employment percent should always be 100%.

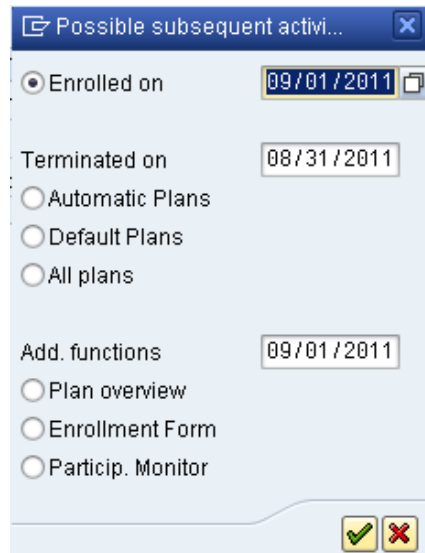
34. Click the **Save (Ctrl+S)**  button.

Notice that when you change the details on the working time infotype, the system reminds you to also manage IT0008, Basic Pay.

 Attention: Please check Basic Pay infotype (0008)

35. Click the **Enter**  button.

36. Click the **Save (Ctrl+S)**  button.



The screenshot shows a dialog box titled "Possible subsequent activi...". It contains the following elements:

- Enrolled on: 09/01/2011
- Terminated on: 08/31/2011
- Automatic Plans
- Default Plans
- All plans
- Add. functions: 09/01/2011
- Plan overview
- Enrollment Form
- Particip. Monitor

At the bottom right of the dialog box are two buttons: a green checkmark icon and a red 'X' icon.

Subsequent activities should only be completed if the Career Progression action is assigning the employee to a position in a different retirement system than his or her current position (for example – going from TSERS to LEORS).

37. Click the **Cancel (F12)**  button.

If you do not need to make changes to the benefits of the individual, click **Cancel** to bypass this infotype.

Create Basic Pay (0008)

Salary amount Payments and deductions

Personnel No 80000489 Name Wanda Hill

EEGroup A SPA Employees PersA 4601 Cultural Resources

EESubgroup A1 FT N-FLSAOT Perm Statu Active

Start 09/01/2011 to 12/31/9999

Subtype 0 Basic contract

Salary

Reason ZH Career Progression Cap.util.lvl 100.00

PS type 02 Banded WkHrs/period 173.33 Monthly

PS Area 06 Career Banding Next inc.

PS group 30005025 Level C Ann.salary 42,551.00 USD

Wa...	Wage Type Long Text	O.. Amount	Curr...	I...	A..	Number/Unit	Unit
1000	Regular Salary	3,545.92	USD		<input checked="" type="checkbox"/>		

IV 09/01/2011 - 12/31/9999 3,545.92 USD

38. Update the following field:

Field Name	Description	Values
Reason	Reason for the action such as Career Progression	Enter value in Reason. Example: ZH

39. Click the **Enter**  button.

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.

Enter the Reason Career Progression (ZH), click Enter to validate the data. Notice the Annual Salary field has retrieved the amount submitted via workflow (or the hourly field is appropriated).

If the employee is hourly, you will manually enter the hourly rate in the amount field; hit enter and the annual salary automatically calculates.

40. Click the **Save (Ctrl+S)**  button.

Personnel Actions

Object manager scenario: EMPLOYEE

- Person
 - Collective search help
 - Search Term
 - Free search

Personnel no. 80000489

Name Wanda Hi 11

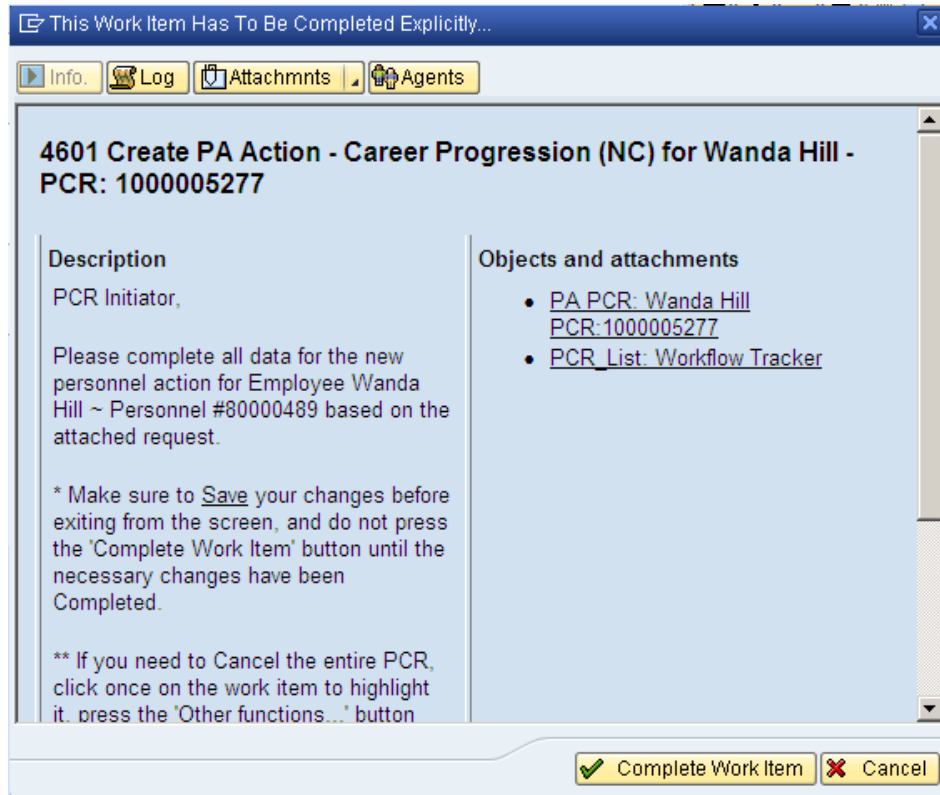
EEGroup A SPA Employees PersA 4601 Cultural Resources

EESubgroup A1 FT N-FLSAOT Perm CostC 4699999999 CULTURE RESOUR...

From 09/01/2011

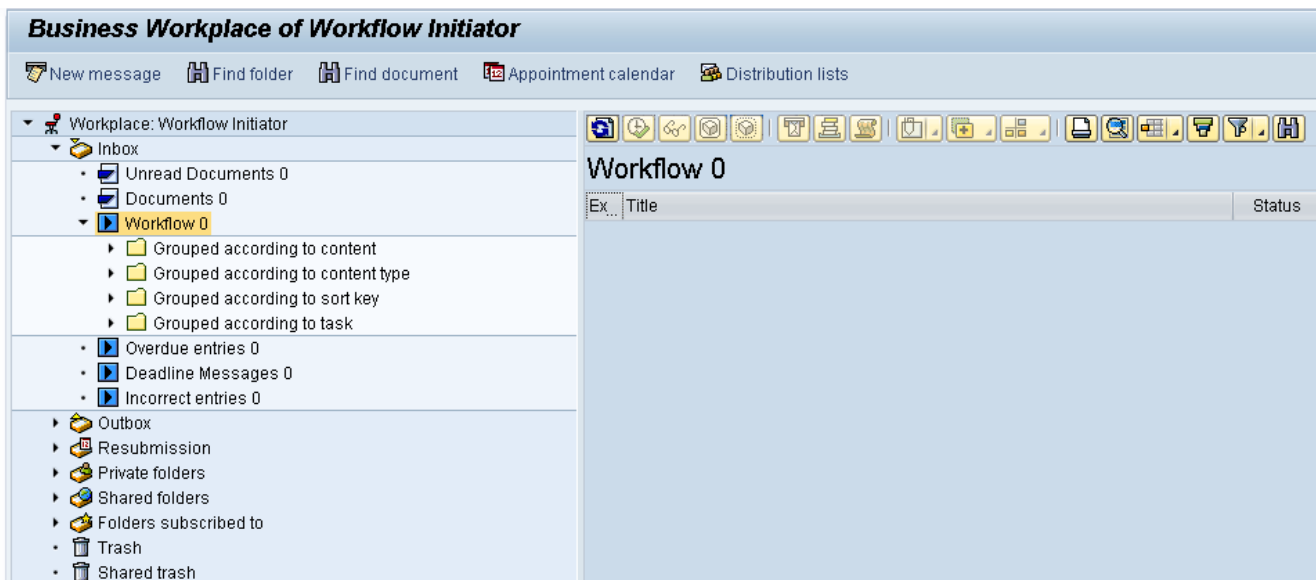
Action Type	Personn...	EE group	EE subg...
New Hire (NC)			
Promotion (NC)			
Reinstatement/Reemployment(NC)			
Leave of Absence (NC)			
Quick Entry (NC)			
Investigatory WPay (NC)			
Suspension (NC)			
Non-Beacon to Beacon(NC)			
Transfer (NC)			
Appointment Change (NC)			
Reallocation (NC)			
Demotion (NC)			
Salary Adjustment (NC)			
Cancel Salary Adjustment(NC)			
Range Revision (NC)			
SeparationPayContinuation(NC)			
Separation (NC)			
Career Progression (NC)			
Band Revision (NC)			

41. Click the **Back (F3)**  button.



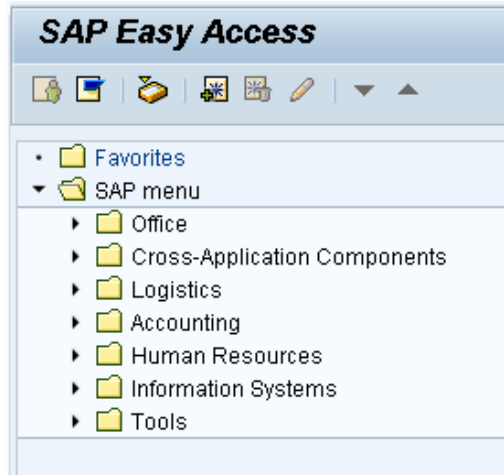
42. Click the **Complete Item**  button.

Only once all of the infotype screens within the action have been processed and the system has returned you to the main screen will this Complete button be visible. Now you may complete the PCR in workflow.



43. Click the **Back (F3)**  button.

You may remain in this SAP Business Workplace and process additional PCR's, or click the Back to return to the main SAP screen.



44. The Career Progression Action is complete, but we recommend reviewing via PA20 all infotypes that have been processed.

ADDITIONAL RESOURCES

Training HELP website:

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

Student Guides	<ul style="list-style-type: none">PA310 – Create & Maintain Employee Data <i>Student Guides > PA310</i>
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