

**Transactions**

- ZPAA076
- SBWP
- PA30

**PA BPP****TRANSFER ACTION****Change Record:**

Change Date: 1/5/2012	Changed by: w.creech
Changes:	<ul style="list-style-type: none"> <li>o Business Process Procedure (pg 3) Change “within” to “outside of” <i>61 – Agency to Agency Reorganization - Position and employee are being transferred to a new supervisor, work unit, county, and/or cost center <b>outside of</b> the current agency due to reorganization. Position number does not change.</i></li> </ul>

**Trigger:**

There is a need to process a Transfer action when moving an employee from one graded position to another or from one banded position to another within the present agency or between BEACON agencies without a break in service.

**Business Process Procedure Overview:**

A transfer is the movement of an employee from one position to another within the present agency or between agencies without a break in service. Normally a transfer between agencies results in an employee reporting to work in the receiving agency the first workday after the last day worked at the releasing agency.

The Releasing Agency and the Receiving Agency should communicate prior to any entry into SAP. This communication process is critical to ensure that the employee does not lose pay or benefits during the transfer.

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.** The Releasing Agency does not enter any actions in SAP because as soon as the Receiving Agency enters the Transfer action, the employee is automatically transferred out of the Releasing Agency. The Releasing Agency only:

- ensures time has been entered, released and approved before time evaluation runs
- delimit Agency specific Benefits
- delimits objects on loan (using PA30) that the employee returned (IT0040 – Objects on Loan)
- verifies accuracy of leave accruals
- discusses overtime comp with the employee (only paid if S-FLSA-OT; otherwise lost if not used within the OT comp aging period)

The Receiving Agency does not create a New Hire action for the employee. After communicating with the Releasing Agency, the Receiving Agency creates a Transfer action for the appropriate reason. The Receiving Agency should verify with the Releasing Agency that the following has occurred prior to completing the action:

- time has been entered, released and approved prior to time evaluation

- objects on loan have been delimited for returned items
- the start date is accurate
- rollover accrual amounts have been verified
- all applicable information has been entered the Action infotype notes
- overtime comp has been discussed with the employee
- Agency specific Benefits have been delimited

The HR Administrator gathers the necessary approved employee data (from documents) and initiates the request for approval for the transfer using transaction code ZPAA076. Once approval has been obtained using the workflow system, the initiator processes the Transfer action. If the transfer occurs within the same agency and the initiator has security access to the "from" and "to" organizational units, the action can be processed directly from the approved PCR in workflow.

This is a two-step process. If the transfer occurs between agencies, or between organizational units within the same agency, but the initiator does not have security access to the "from" organizational unit, follow these instructions exactly. Additional security checks are run which allow the "from" position to be posted as vacant when transferring the person out of the position.

**TRANSFER NOTE:** When processing a temporary to permanent or bi-weekly to monthly transfer, process the workflow as normal, but upon receiving the approved workflow, complete the BEST Shared Services Employee Movement within system form and fax to BEST Shared Service, for processing.

Reasons:

- 01 - Agency to Agency Lateral
  - movement to a position assigned the same salary grade or
  - movement between positions from one career-banded class to another with the same journey market rate or
  - movement to a position within the same banded class within the same competency level
- 02 - Agency to Agency Re-assignment
  - movement to a position assigned a lower salary grade or
  - movement between positions from one career-banded class to another with a lower journey market rate or
  - movement to a position within the same banded class with a lower competency level
- 05 - Agency to Agency Promotion
  - 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 to a position within the same banded class with a higher competency level

If the move is within the Agency, and you do not have authority to process the transfer from the organizational unit the person is coming from, follow these same instructions (if you have security authorization to both organizational units, then you may process the entire transfer action at one time, you do not need to restart the process):

- 06 - Within Agency Lateral
  - a change in status resulting from assignment to a position assigned a same salary grade or
  - movement between positions from one career-banded class to another with the same journey market rate
- 07 - Within Agency Re-assignment
  - a change in status resulting from assignment to a position assigned a lower salary grade or

- movement between positions from one career-banded class to another with a lower journey market rate
- 08 - Grade Band Transfer
  - employee movement between banded and graded classes
  - banded to graded
  - graded to banded
- 09 – Class/Pay Plan Change – Employee movement between two SPA positions assigned to different class/pay systems:
  - Graded
  - Career banded
  - Pilot banded
  - Skill Based Pay
  - Flat Rate
- 10 – EPA-SAP – Employee movement between an EPA position and an SPA position or vice versa (Change in position number)
- 12 – Temp to Perm – Employee movement from a temporary position to a permanent position (Change in position number) *Contact BEST Shared Services for processing*
- 13 – Perm to Temp – Employee movement from a permanent position to a temporary position (Change in position number) *Contact BEST Shared Services for processing*
- 60 – Within Agency Reorganization – Position and employee are being transferred to a new supervisor, work unit, county, and/or cost center within the current agency due to reorganization. Position number does not change.
- 61 – Agency to Agency Reorganization - Position and employee are being transferred to a new supervisor, work unit, county, and/or cost center outside of the current agency due to reorganization. Position number does not change.

**Tips and Tricks:**

See the **PA BPP 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*

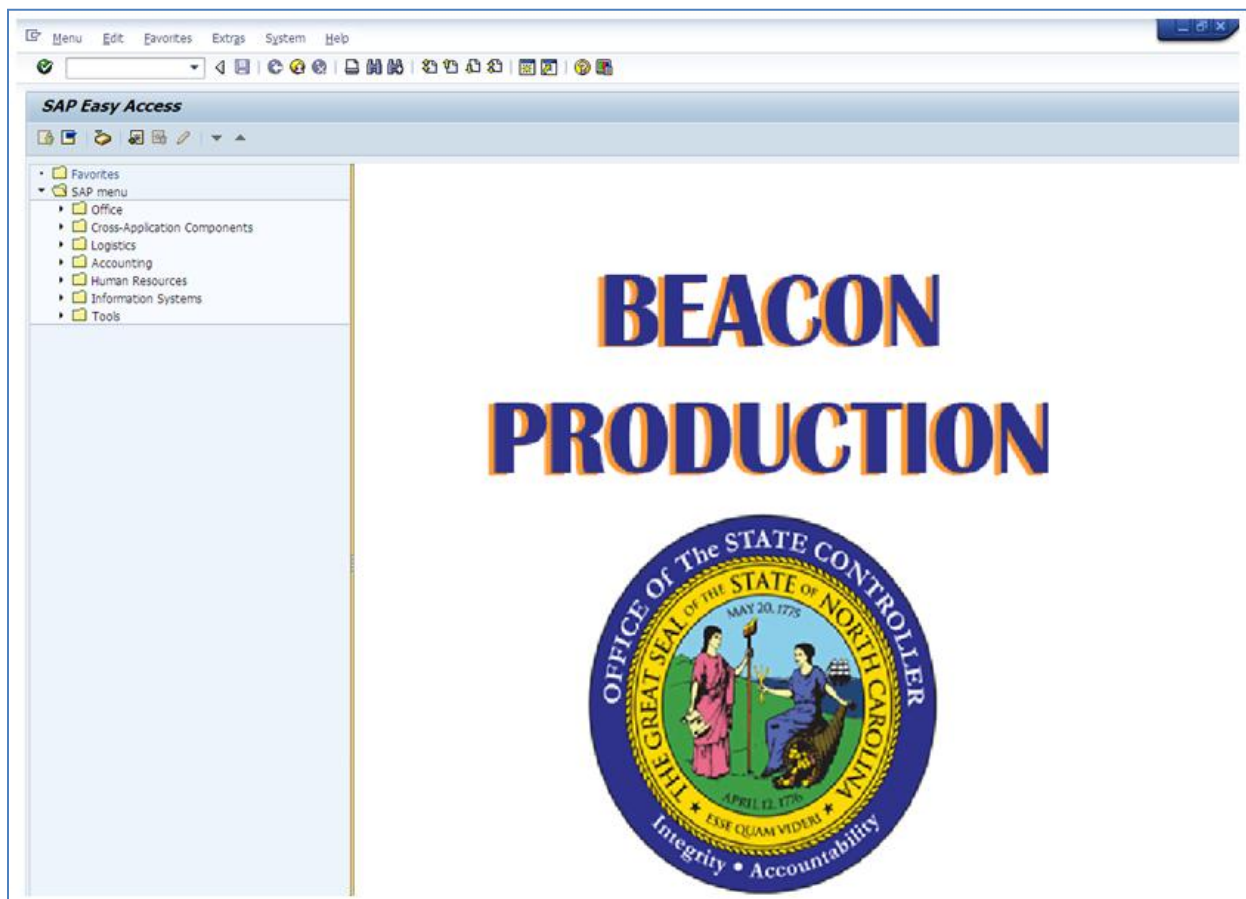
If working with a Transfer workflow, ensure the position is vacant to which the person is being transferred.

We recommend, on the Employee Action Request, first enter the EE Position number first and then clicking Enter to request validation by SAP and the pre-population of many of the fields. If other fields are entered prior to the position number, when SAP validates the position number, the fields may not populate properly.

**Access Transaction:**

<b>Via Menu Path:</b>	Your menu path may contain this custom transaction code depending on your security roles.
<b>Via Transaction Code:</b>	ZPAA076


## 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.  <b>Example:</b> 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.  Sheila Jenkins

Last 4 digits (SSN)  First  Last

Effective on

Action Type  Transfer (NC)

Reason  Agency to Agency - Lateral

3. Update the following fields:

Field Name	Description	Values
Personnel No.	Unique employee identifier	Enter value in Personnel No.  <b>Example:</b> 80000035
Effective on	The date on which the action will be effective	Enter value in Effective on.  <b>Example:</b> 05/15/2008

Action Type	An action is a grouping of activities used to perform a specific task. The action will prompt the user for the Infotypes required to complete the task.	Enter value in Action Type.  <b>Example:</b> Z8
Reason	Reason for the action, such as Agency to Agency - Lateral	Enter value in Reason.  <b>Example:</b> 01

4. Click the **Enter**  button.

Enter the Personnel Number of the individual to be transferred. Click Enter to retrieve the name of the individual and verify you have the correct Personnel Number.

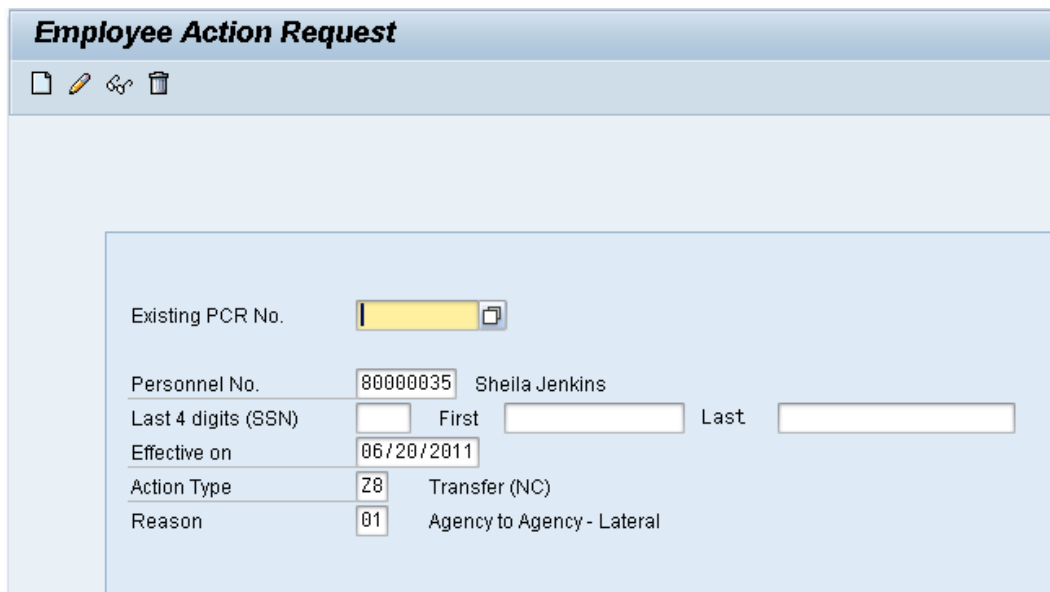
If you need to look up the personnel number, click your cursor in the field and click on the match code search button to the right of the field for search options.

**NOTE:** If the employee is not available in your security access, use the BI report Cross Agency Verification to obtain the Personnel Number.

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 from. For specific information on each reason, view the business process overview section at the beginning of these instructions.

Click Enter to verify the information is correct before proceeding.



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  Sheila Jenkins Action:  Transfer (NC)

Last 4 digits(SSN)   Reason:  Agency to Agency - Lateral

Effective on   Chng   St:

CURRENT		PROPOSED	
Pers.Area	<input type="text" value="1601"/> Environment Natural Resources	Pers.Area	<input type="text" value="4601"/> Cultural Resources
Subarea	<input type="text" value="AC01"/> 7day Norm	Subarea	<input type="text" value="NC01"/> 7day Norm
EE Group	<input type="text" value="A"/> SPA Employees	EE Group	<input type="text" value="A"/> SPA Employees
EE Subgroup	<input type="text" value="A1"/> FT N-FLSAOT Perm	EE Subgrp	<input type="text" value="A1"/> FT N-FLSAOT Perm
Org. Unit	<input type="text" value="20003893"/> ENR SO ASIT Asst Sect-IT	Org. Unit	<input type="text" value="20010303"/> CR CDS ARTS COUNCIL Assis
Job	<input type="text" value="30000804"/> Administrative Officer II	Job	<input type="text" value="30010238"/> Assistant Director - Arts
EE Position	<input type="text" value="65002443"/> Contracts Administrator	EE Position	<input type="text" value="65001505"/> Assistant Director - Arts Council

**Basic Pay**

Pay Scale type	<input type="text" value="01"/> Graded	Pay Scale type	<input type="text" value="01"/> Graded
Pay Scale Area	<input type="text" value="01"/> Annual Salaries	Pay Scale Area	<input type="text" value="01"/> Annual Salaries
Pay Scale Group	<input type="text" value="GR70"/> Level <input type="text" value="GR"/>	Pay Scale Group	<input type="text" value="GR70"/> Level <input type="text" value="GR"/>
Annual Salary	<input type="text" value="52,174.00"/> Hrly Sal <input type="text" value="0.00"/>	Annual Salary	<input type="text" value="52,174.00"/> Hourly Salary <input type="text"/>
	<input type="text" value="Calc Step - +MP"/>		<input type="text" value="Calc Step - +MP"/> <input type="text" value="0.00"/>
	Min <input type="text" value="38,174.00"/>		Max <input type="text" value="61,632.00"/> Next Inc Date <input type="text"/>

**Dates**

Last day worked

6. Update the following fields:

Field Name	Description	Values
EE Position	Position number assigned to the employee	Enter value in EE Position.  <b>Example:</b> 65001505
Annual Salary	Employee's annual basic pay	Enter value in Annual Salary.  <b>Example:</b> 52174


7. Click the **Enter**  button.

Enter the new EE Position number which you are transferring the person TO, then click Enter. This will process a system validation, and change the Personnel Area and Personnel Subarea to match the new position.

Enter the new salary/hourly information in the Annual Salary or Hourly Salary field. Click Enter to validate the data.

If the employee is an hourly employee, you will have to enter the hourly amount. The annual amount doesn't populate for hourly/salary employees. The system will calculate on IT0008 Basic Pay when created.

\*Fields with ✓ check marks are mandatory.

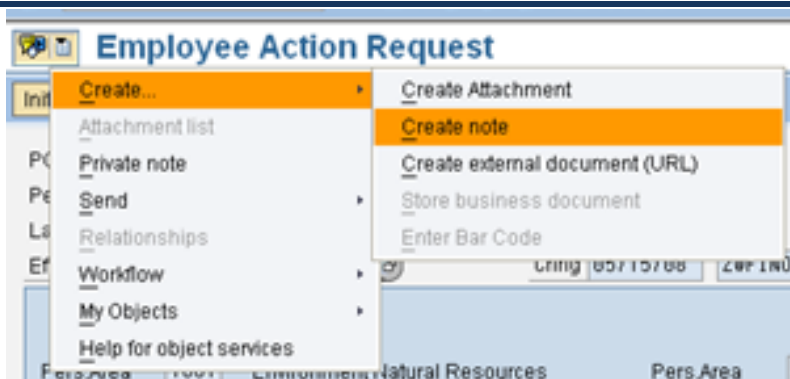
 **CRITICAL!** You will notice as you're entering data that there is an order the system prefers to receive data in. If this is a Pay Grade to Banded transfer (or Banded to Pay Grade transfer), enter the Pay Scale type, Pay Scale Area and Pay Scale Group on the right side before clicking Enter. If you enter the Pay Scale type and Pay Scale Area and click Enter before entering the Pay Scale Group, the system will give you an error message stating "No entry in table T710 for the key XXXXX". This means that the combination of Pay Scale type and area don't match the Pay Scale Group, until you change to the new Pay Scale Group. Click Enter to pass by this message and complete all fields, or enter all fields prior to clicking Enter to avoid this message.




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.

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

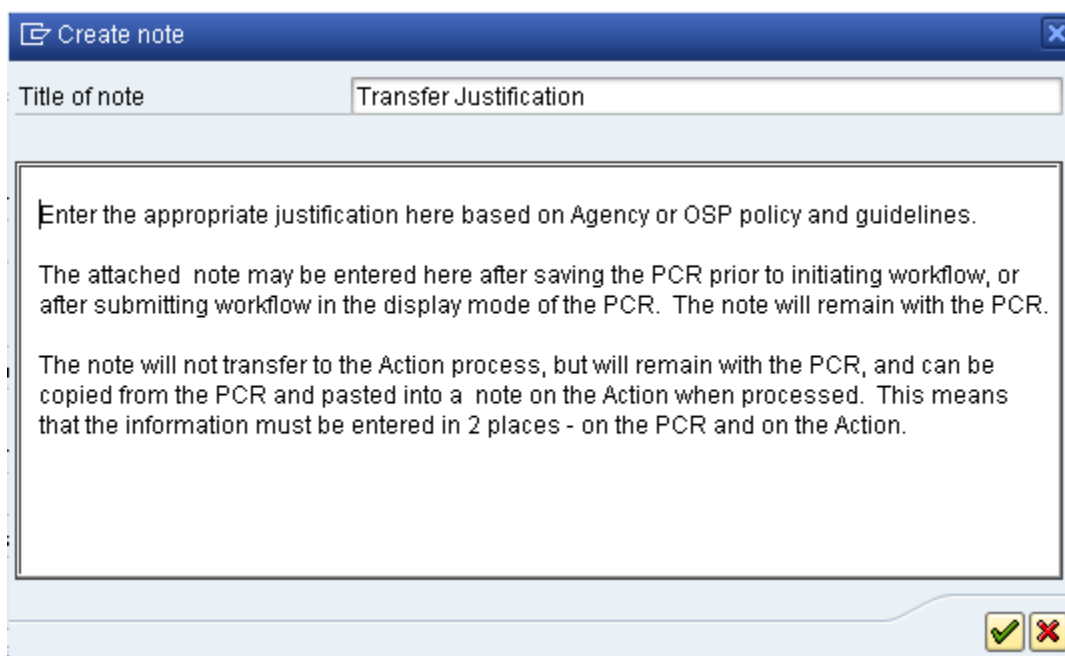
Review the data prior to saving. If the data is correct, click Save.



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



11. 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.  <b>Example:</b> Transfer Justification
Long text	An open text field	Enter value in long text.  <b>Example:</b> appropriate information

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

**Employee Action Request**

Initiate WF

PCR Number

Personnel Number  Sheila Jenkins      Action:  Transfer (NC)

Last 4 digits(SSN)          Reason:  Agency to Agency - Lateral

Effective on        Chng   St:  Created

CURRENT		PROPOSED	
Pers.Area	<input type="text" value="1601"/> Environment Natural Resources	Pers.Area	<input type="text" value="4601"/> Cultural Resources
Subarea	<input type="text" value="AC01"/> 7day Norm	Subarea	<input type="text" value="NC01"/> 7day Norm
EE Group	<input type="text" value="A"/> SPA Employees	EE Group	<input type="text" value="A"/> SPA Employees
EE Subgroup	<input type="text" value="A1"/> FT N-FLSAOT Perm	EE Subgrp	<input type="text" value="A1"/> FT N-FLSAOT Perm
Org. Unit	<input type="text" value="20003893"/> ENR SO ASIT Asst Sect-IT	Org. Unit	<input type="text" value="20010303"/> CR CDS ARTS COUNCIL Assis
Job	<input type="text" value="30000004"/> Administrative Officer II	Job	<input type="text" value="30010238"/> Assistant Director - Arts
EE Position	<input type="text" value="65002443"/> Contracts Administrator	EE Position	<input type="text" value="65001505"/> Assistant Director - Arts Council...

Basic Pay

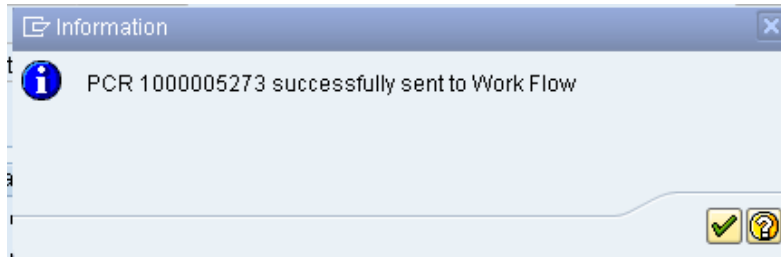
Pay Scale type	<input type="text" value="01"/> Graded	Pay Scale type	<input type="text" value="01"/> Graded
Pay Scale Area	<input type="text" value="01"/> Annual Salaries	Pay Scale Area	<input type="text" value="01"/> Annual Salaries
Pay Scale Group	<input type="text" value="6R70"/> Level <input type="text" value="6R"/>	Pay Scale Group	<input type="text" value="6R70"/> Level <input type="text" value="6R"/>
Annual Salary	<input type="text" value="52,174.00"/>	Hrly Sal	<input type="text" value="0.00"/>
Annual Salary	<input type="text" value="52,174.00"/>	Hourly Salary	<input type="text"/>
Calc Step - +MP <input type="text"/>		Calc Step - +MP <input type="text" value="0.00"/> <input type="checkbox"/>	
Min	<input type="text" value="38,174.00"/>	Max	<input type="text" value="61,632.00"/>
Next Inc Date	<input type="text"/>		

Dates

Last day worked

13. Click the **Initiate WF**  button.

Select the Initiate Workflow button to send the Transfer 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).



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

A screenshot of the "Employee Action Request" form. The title bar includes a toolbar with icons for print, edit, undo, and delete. The form fields are: Existing PCR No. (text box with a copy icon), Personnel No. (text box), Last 4 digits (SSN) (text box), First (text box), Last (text box), Effective on (text box with value "06/16/2011"), Action Type (radio button for "Transfer (NC)"), and Reason (radio button for "Agency to Agency - Lateral").

**NOTE:** To view the PCR, including notes and/or attachments, see the Display PCR Job Aid located on the Training Help website <http://www.osc.nc.gov/training/osctd/help/> in the following folder: *Personnel Administration > Job Aids*.

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

16. The Initiate Transfer Action is complete.

After Workflow Approvals have been received, proceed with the Complete Transfer Action process.

## Instructions for Completing the Action

### Access Transaction:

Via Menu Path:	SAP menu ==> Office ==> SBWP - Workplace
Via Transaction Code:	SBWP, PA30



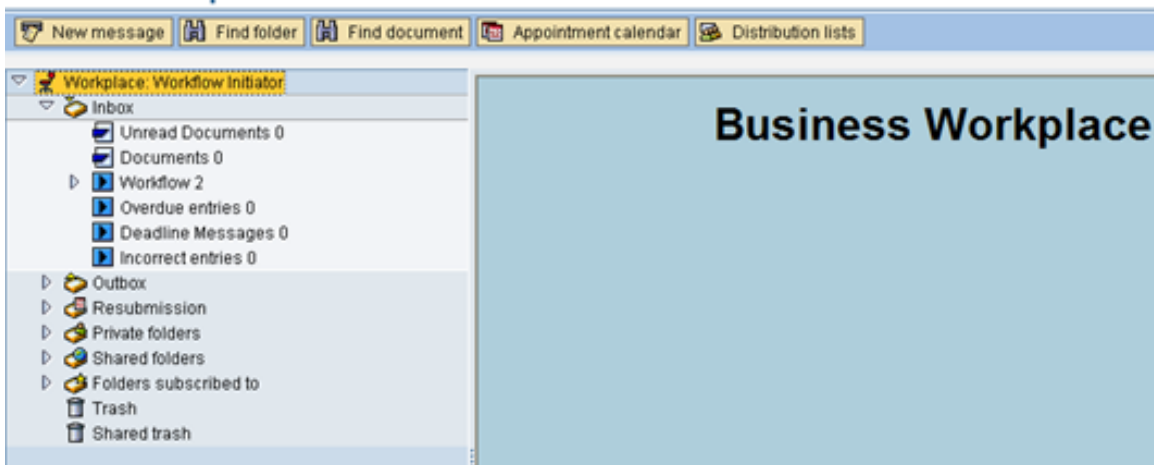
17. Click the **SAP Business Workplace (Ctrl+F12)**  button.

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

  
**CRITICAL!**

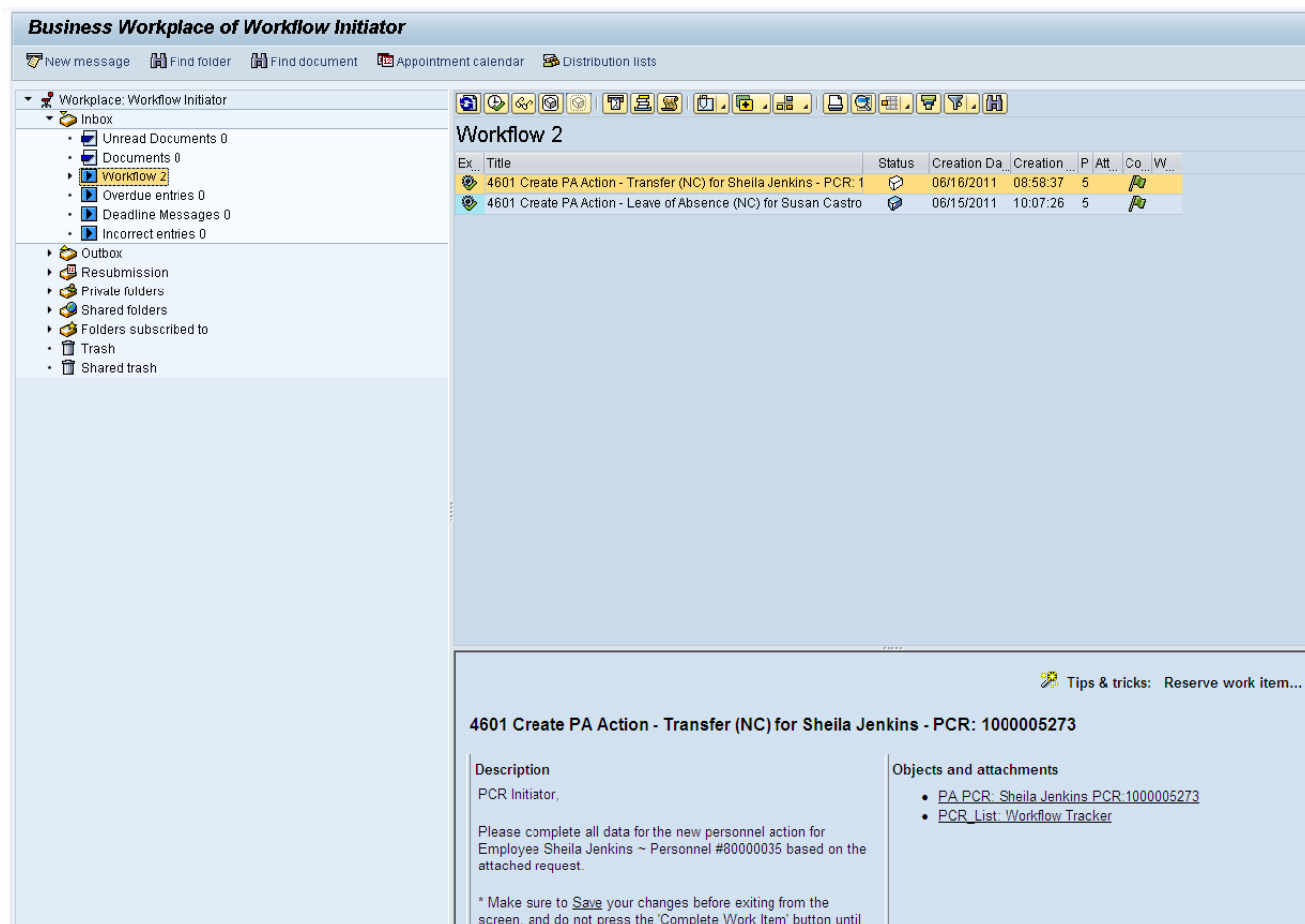
If you are processing a Transfer action from an organizational unit which you do not have security access to, you must follow these instructions explicitly. The instructions guide you through completing the initial steps of the action, completing the workflow item and then finishing the action using transaction code PA30 (completing the second step of the process). This is required to allow the system to conduct additional security checks so you are able to create the vacancy in the position you're moving the person from (for which you do not have security authorization to do).

## Business Workplace of Workflow Initiator



18. Select **Inbox >> Workflow**.

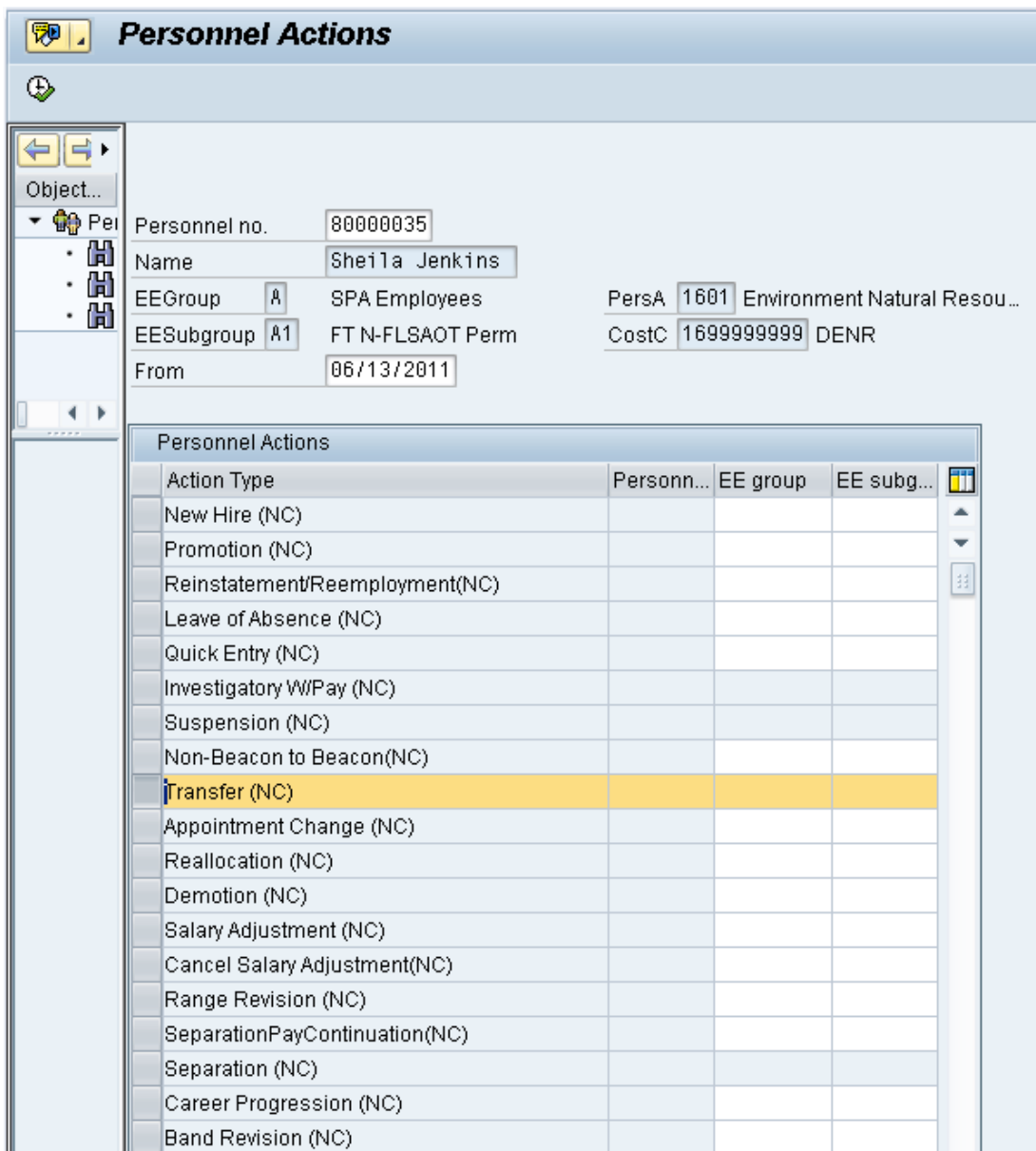
You can process using step 19 or step 20.



19. Select the PCR **4601 Create PA Action - Transfer (NC) for Sheila Jenkins - PCR: 1000005273** row.  
Double-click on row.

A list of your approved (or rejected) PCR's are listed on the right side of the screen. You may view the PCR details and/or Workflow Tracker details prior to executing the PCR if desired. Once the PCR is executed the Transfer action will be launched.

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




Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From.  <b>Example:</b> 06/13/2011






21. Highlight the **Transfer (NC)** action type.

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

Verify this is the individual for whom you will be processing the Transfer action.

 **CRITICAL!** The effective date is the date the Transfer will go into effect, and **MUST** match the date that was submitted as the effective date on the original PCR. The system will not fill this date in - you can find the date on the PCR display from your inbox if you do not know the effective date on the original PCR (not necessarily the date the PCR was submitted, but the date the Transfer is to be effective).

### Copy Actions (0000)




 Execute info group
  Change info group

Pers.No.

Name

EEGroup  SPA Employees      PersA  Environment Natural Resources

EESubgroup  FT N-FLSAOT Perm

Start  to

---

**Personnel action**

Action Type  ▼

Reason for Action  Agency to Agency - Lateral

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**Status**

Customer-specific  ▼

Employment  ▼

Special payment  ▼

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**Organizational assignment**

Position  Assistant Director - Arts

Personnel area  Cultural Resources

Employee group  SPA Employees

Employee subgroup  FT N-FLSAOT Perm

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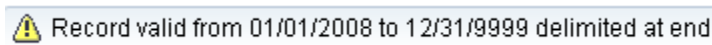
**Additional actions**

Start Date	Act.	Action Type	ActR	Reason for action

23. Click the **Enter**  button.




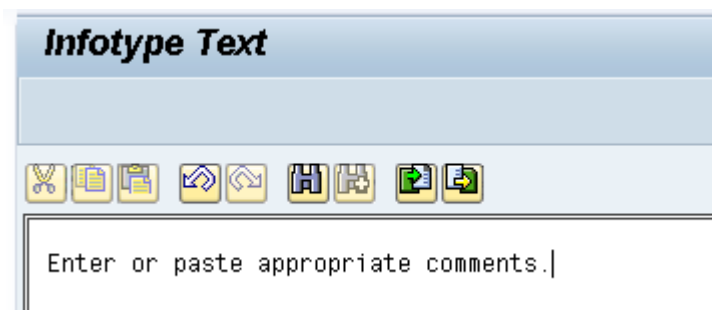
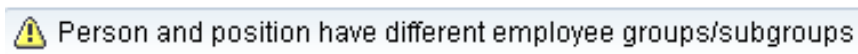
24. Click the **Enter**  button.



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.


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



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

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

26. Click the **Enter**  button.

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

### Create Organizational Assignment (0001)

Org Structure

Personnel No 80000035 Name Sheila Jenkins

EEGroup A SPA Employees PersA 1601 Environment Natural Resources

EESubgroup A1 FT N-FLSAOT Perm Statu Active

Start 06/13/2011 to 12/31/9999

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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 600000000000000000 General Government

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Personnel structure

EE group A SPA Employees Payr.area 01 NC Monthly

EE subgroup A1 FT N-FLSAOT Perm Contract

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Organizational plan

Percentage 100.00 Assignment


Position 65001505 800904000627 Assistant Director - Ar...

Job key 30010238 Ast Dir - Ar Assistant Director - Ar...

Org. Unit 20010303 48060303421 CR CDS ARTS COUN...

Org.key 460146999999999

28. Click the **Enter**  button.

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

Create Vacancy

S 65002443 Contracts Administrator

Create on 06/13/2011

Yes No Cancel

30. Click the **Yes**  button.

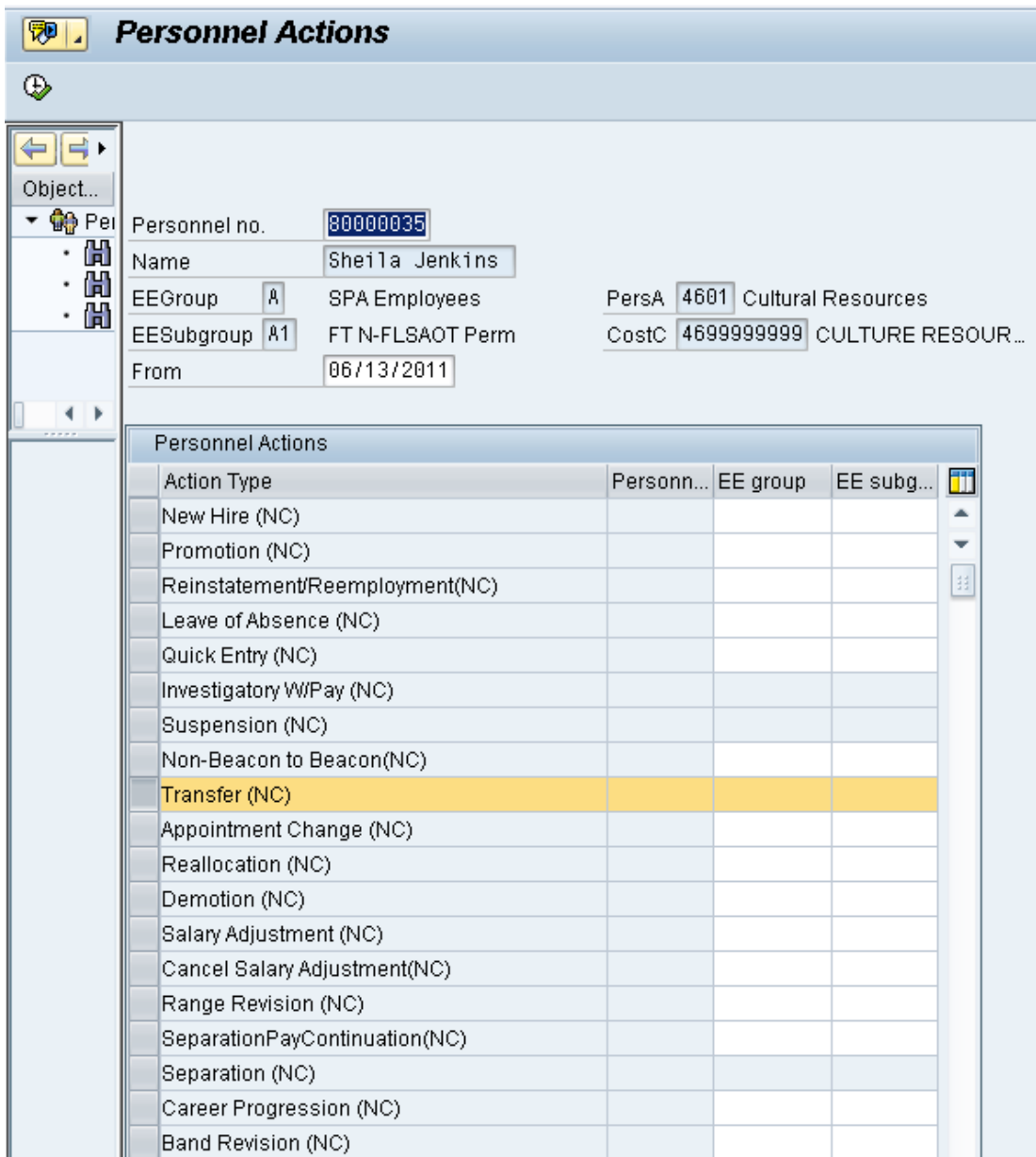
Click **Yes** to create the vacancy for the position that the person is leaving.



Delimit Vacancy dialog box showing:  
S 65001505 Assistant Director - Arts Council  
Delimit on: 06/12/2011  
Buttons: Yes, No, Cancel

31. Click the **Yes**  button.

Click **Yes** to delimit the vacancy of the position to which the person is going.



**Personnel Actions**

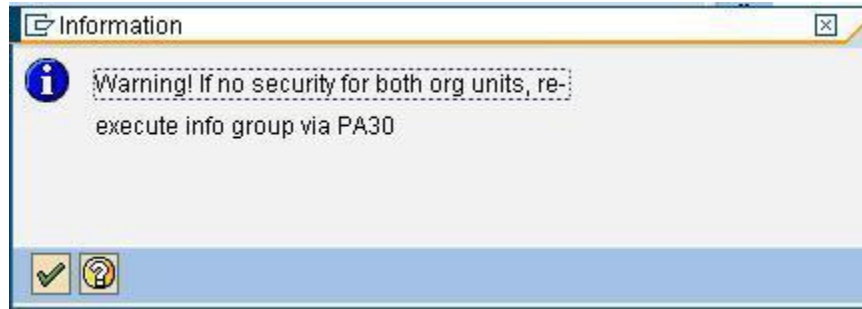
Object...  
Personnel no. 80000035  
Name Sheila Jenkins  
EEGroup A SPA Employees PersA 4601 Cultural Resources  
EESubgroup A1 FT N-FLSAOT Perm CostC 4699999999 CULTURE RESOUR...  
From 06/13/2011

Action Type	Personn...	EE group	EE subg...
New Hire (NC)			
Promotion (NC)			
Reinstatement/Reemployment(NC)			
Leave of Absence (NC)			
Quick Entry (NC)			
Investigatory W/Pay (NC)			
Suspension (NC)			
Non-Beacon to Beacon(NC)			
<b>Transfer (NC)</b>			
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)			


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

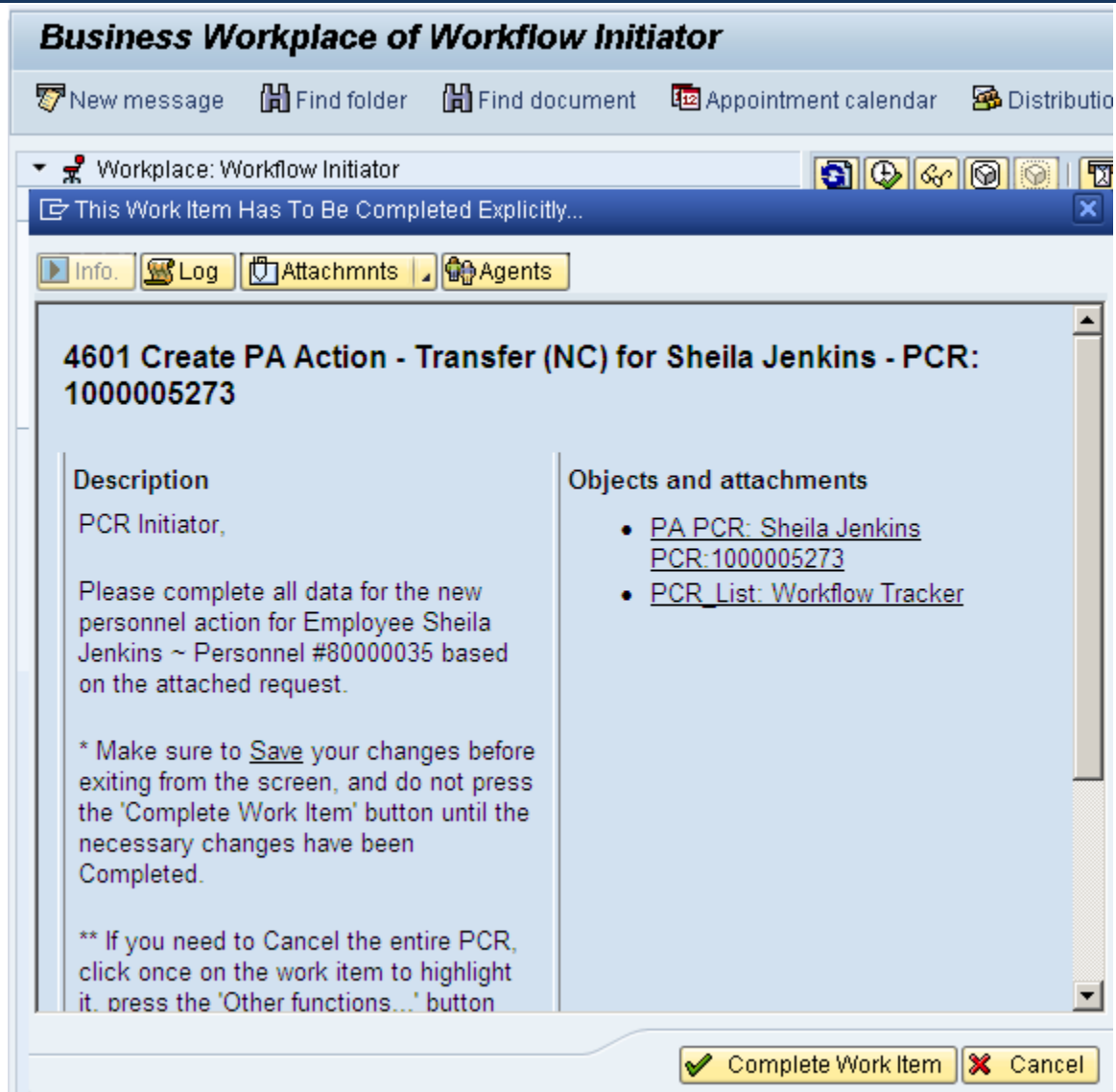
When performing the Transfer action, many end-users are failing to complete the process. The system will remind the end-user to complete the action via PA30, Execute Info Group.

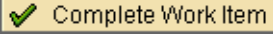
A pop-up informational box will display when the user clicks on the green arrow back button during the PA40 process.



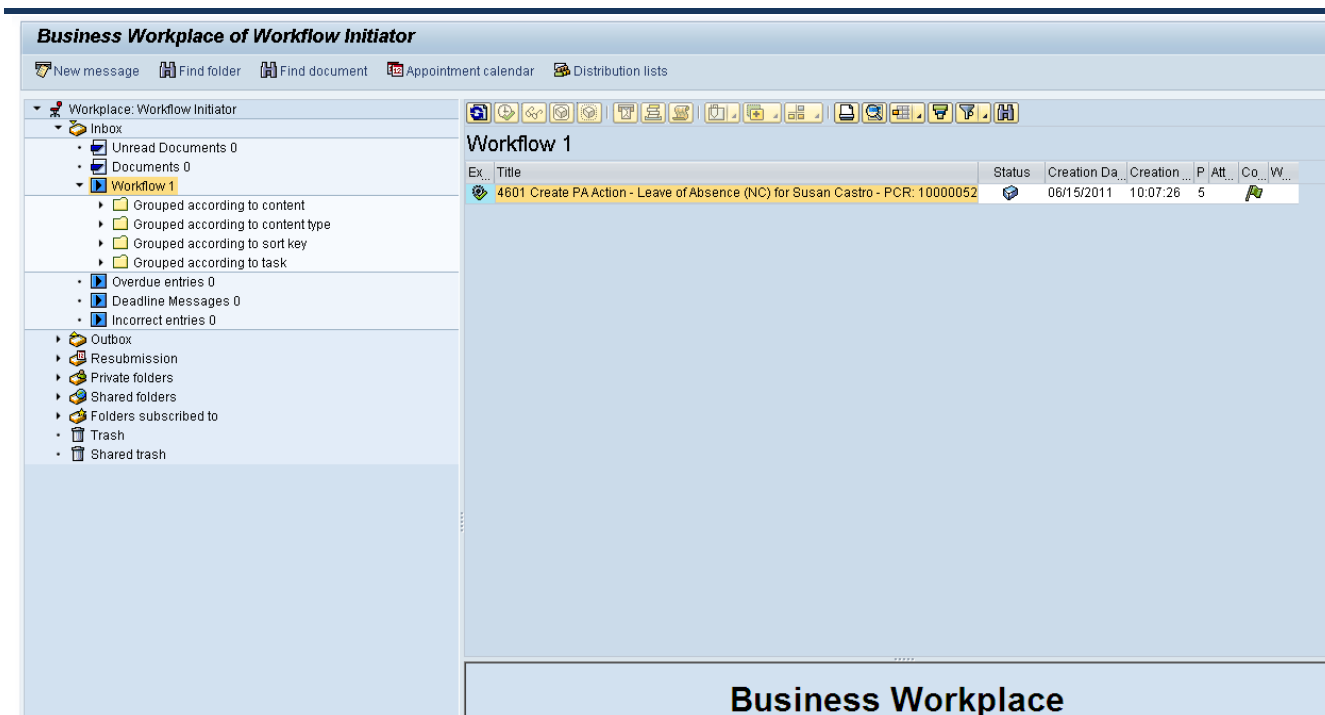
33. Click the **(Enter)**  button.

 <b>CRITICAL!</b>	<p>You <b>MUST</b> exit the transaction now if you do not have security authorization for the organizational unit that the "from" position belongs to. The system will not allow you to continue in the action, it will bring you back to the main action screen.</p> <p>If you are processing an inter-agency transfer and you have security authorization for both organizational units, you may continue with the action, the system will not bring you back to the action screen until you have processed all infotypes, including Objects on Loan, etc.</p>
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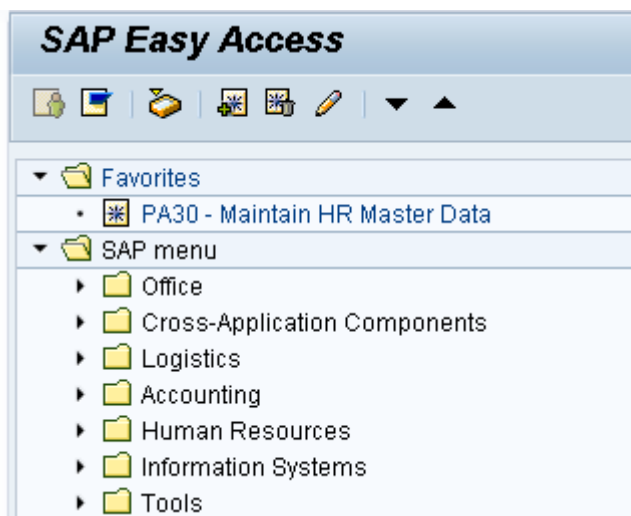


34. Click the **Complete Item**  button.

Even though you have not completed this action yet, you will in the next steps, so you may click Complete Work Item.



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

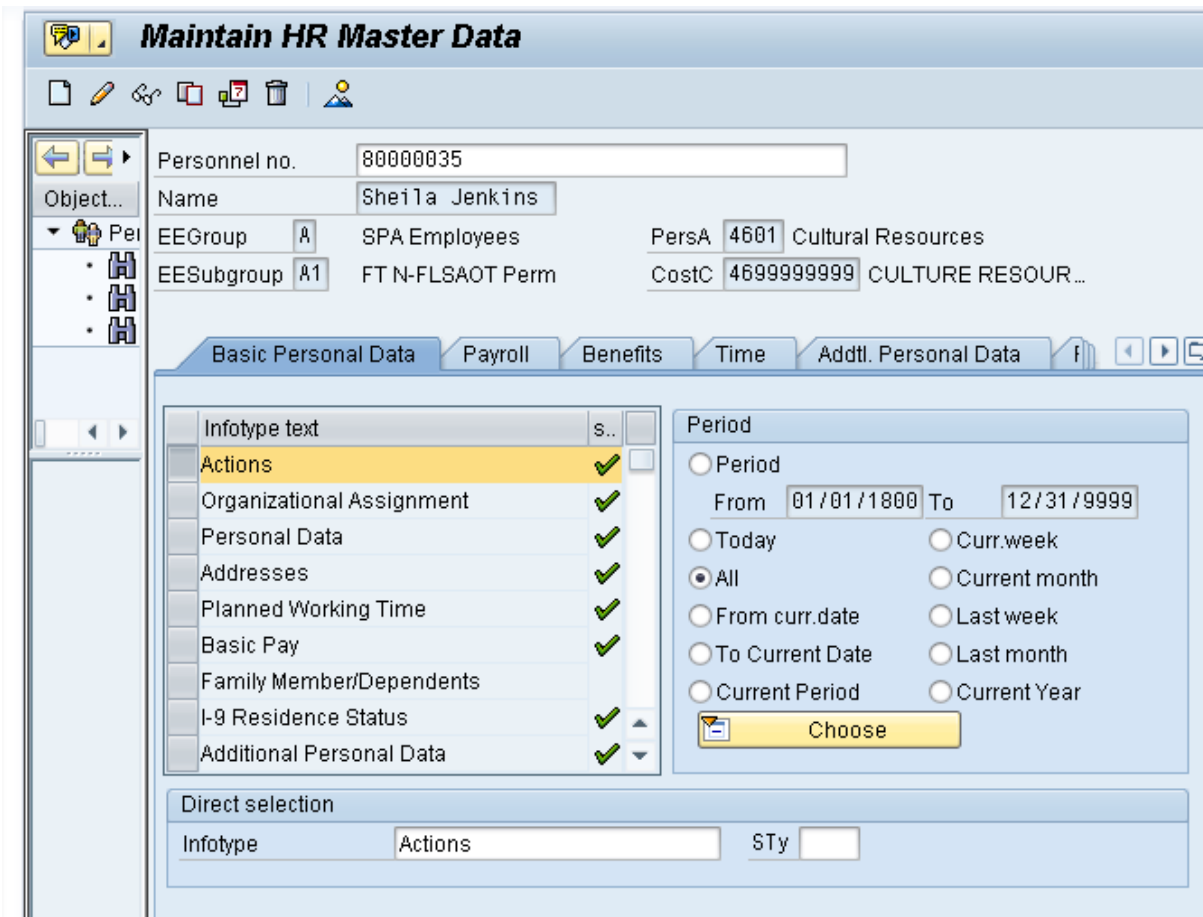



36. Update the following field:

Field Name	Description	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	Enter value in Command. <b>Example:</b> PA30




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

Exit the inbox transaction and go to transaction code PA30 to complete the processing of this action. This "break" in processing will allow the system to process the 'create vacancy' on the position that you do not have security access to process yourself.



38. Click the **Actions**  row.
39. Click the **All**  All button.
40. Click the **Overview (Shift+F8)**  button.

**List Actions (0000)**

Pers.No. 80000035  
Object... Name Sheila Jenkins  
EEGroup A SPA Employees PersA 4601 Cultural Resources  
EESubgroup A1 FT N-FLSAOT Perm  
Choose 01/01/1800 to 12/31/9999

Start Date	End Date	Act.	Action Type	ActR	Reason for action	C...	E
06/13/2011	12/31/9999	Z8	Transfer (NC)	01	Agency to Agency - Later...	3	▲
01/01/2008	06/12/2011	Z0	New Hire (NC)	01	New Hire	3	▼

41. Select the **Transfer Action** row.

42. Click the **Copy**  button.

Select the **Transfer Action** row and click **Copy**. This will bring you to an area where you may continue processing the infotypes of the action that you were not able to process yet.

 **NOTE:** Do not use the **Change** button here, only use the **Copy** button.  
**CRITICAL!**

### Copy Actions (0000)

Execute info group    Change info group

Pers.No. 80000035  
Name Sheila Jenkins  
EEGroup A SPA Employees    PersA 4601 Cultural Resources  
EESubgroup A1 FT N-FLSAOT Perm  
Start 06/13/2011 to 12/31/9999

**Personnel action**  
Action Type Z8 Transfer (NC)  
Reason for Action 01 Agency to Agency - Lateral

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

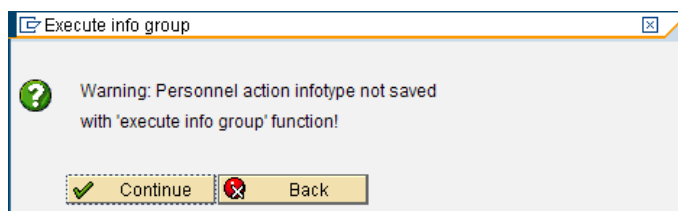
**Organizational assignment**  
Position 65001505 Assistant Director - Arts  
Personnel area 4601 Cultural Resources  
Employee group A SPA Employees  
Employee subgroup A1 FT N-FLSAOT Perm

**Additional actions**

Start Date	Act.	Action Type	ActR	Reason for action
06/13/2011	Z8	Transfer (NC)	01	Agency to Agency - Lateral

43. Click the **Execute Info Group**  button.

Click the Execute Info group button to restart the action.



44. Click the **Continue**  button.

### Create Organizational Assignment (0001)

Org Structure

Personnel No  Name

EEGroup  SPA Employees PersA  Cultural Resources

EESubgroup  FT N-FLSAOT Perm Statu

Start  to

---

#### Enterprise structure

CoCode  STATE OF NC

Pers.area  Cultural Resources Subarea  7day Norm

Cost Ctr  CULTURE RESOU... Bus. Area  Cultural Resources

Fund  CULTURE- SUSP ...

Func. Area  General Government

---

#### Personnel structure

EE group  SPA Employees Payr.area  NC Monthly

EE subgroup  FT N-FLSAOT Perm Contract

---

#### Organizational plan

Percentage

Position  800904000627  
Assistant Director - Ar...


Job key  Ast Dir - Ar  
Assistant Director - Ar...

Org. Unit  48060303421  
CR CDS ARTS COUN...




Org.key

45. Click the **Enter**  button.

Review the caution message and save the data.

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

### Copy Date Specifications (0041)

Personnel No  Name   
EEGroup  SPA Employees PersA  Cultural Resources  
EESubgroup  FT N-FLSAOT Perm Statu   
Start  to

Date Specifications			
Date type	Date	Date type	Date
<input type="text" value="01"/> Original Hire Date	<input type="text" value="01/01/2008"/>	<input type="text" value="02"/> Agency Hire Date	<input type="text" value="06/13/2011"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

47. Click the **Enter**  button.

**Information:**

Review the caution messages and save the data.

System defaults Date Types with Action Effective Date:

- o 02 Agency Hire Date




Also for specific Jobs in Judicial defaults Date Type:

- o 04 Judicial Anniversary Date

**NOTE:** This infotype is not created for Supplemental Staff.

48. 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

Time Mgmt status

Working week

Part-time employee

#### Working time

Employment percent	<input type="text" value="100.00"/>
Daily working hours	<input type="text" value="8.00"/>
Weekly working hours	<input type="text" value="40.00"/>
Monthly working hrs	<input type="text" value="173.33"/>
Annual working hours	<input type="text" value="2080.00"/>
Weekly workdays	<input type="text"/>


49. Click the **Enter**  button.

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.

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%.

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

Possible subsequent activi...

Enrolled on 06/13/2011

Terminated on 06/12/2011

Automatic Plans

Default Plans

All plans

Add. functions 06/16/2011

Plan overview

Enrollment Form

Particip. Monitor

OK Cancel

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

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

If you need to process changes to the benefits, click **Continue**. In this example we will not process changes to benefits, and will click **Cancel**.

### Create Basic Pay (0008)

Salary amount    Payments and deductions

Personnel No: 80000035    Name: Sheila Jenkins

EEGroup: A    SPA Employees    PersA: 4601    Cultural Resources

EESubgroup: A1    FT N-FLSAOT Perm    Statu: Active

Start: 06/13/2011 to 12/31/9999

Subtype: 0    Basic contract

**Salary**

Reason: Z8    Transfer    Cap.util.lvl: 100.00

PS type: 01    Graded    WkHrs/period: 173.33    Monthly

PS Area: 01    Annual Salaries    Next inc.:

PS group: GR70    Level: GR    Ann.salary: 52,174.00    USD

Wa...	Wage Type Long Text	O..	Amount	Curr...	I...	A.	Number/Unit	Unit
1000	Regular Salary		4,347.83	USD		<input checked="" type="checkbox"/>		

IV 06/16/2011 - 12/31/9999    4,347.83    USD

52. Update the following field:

Field Name	Description	Values
Reason	Reason for the action, such as Transfer	Enter value in Reason.  <b>Example:</b> Z8

53. 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 for this Transfer [Z8], and click Enter to validate the data. Notice the Annual Salary field has retrieved the amount submitted via workflow (or the hourly field if appropriate).

You will manually enter the hourly rate in the amount field; hit enter annual salary automatically calculates.

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

### Copy Unemployment State (0209)

Personnel No	80000035	Name	Sheila Jenkins
EEGroup	A SPA Employees	PersA	4601 Cultural Resources
EESubgroup	A1 FT N-FLSAOT Perm	Statu	Active
Start	06/13/2011 <input type="checkbox"/>	to	12/31/9999

Unemployment data	
Tax authority	NC North Carolina
Worksite	24 Dept of Cultural Resources

Always verify that the default information on the Create Unemployment State infotype is correct before saving.

55. Click the **Enter**  button.

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

**Copy Objects on Loan (0040)**

Personnel No  Name

EEGroup  SPA Employees PersA  Cultural Resources

EESubgroup  FT N-FLSAOT Perm Statu

Start  to

---

**Objects on Loan**

Object on loan  State ID

Number/unit  Pieces

Loan object no.

---

**Comments**

Line 1

Line 2

Line 3

57. Update the following fields:


Field Name	Description	Values
Object on loan	Enter the key of the object the employee has borrowed from the company.	Enter value in Object on loan.  <b>Example:</b> 01
Number/unit	Enter number/unit of items out on a loan.	Enter value in Number/unit.  <b>Example:</b> 1
Number/unit	Enter number/unit of items out on a loan.	Enter value in Number/unit.  <b>Example:</b> Pieces
Loan object no.	Identification or reference number of the object (if available)	Enter value in Loan object no.  <b>Example:</b> 551160

58. Click the **Enter**  button.

Enter the object on loan that will be issued to the individual.

Comments may be entered on lines 1, 2, and 3 if appropriate for your business policy.

**NOTE:** If the employee receives more than one item on loan, you will need to process another PA30 transaction in order to add the additional line items to infotype 0040.

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

The objects on loan items and information may change. Adjust as appropriate and save the data.

**List Actions (0000)**










Pers.No.   
 Name   
 EEGroup  SPA Employees      PersA  Cultural Resources  
 EESubgroup  FT N-FLSAOT Perm  
 Choose  to

Start Date	End Date	Act.	Action Type	ActR	Reason for action	C...	E
06/13/2011	12/31/9999	Z8	Transfer (NC)	01	Agency to Agency - Later...		3 ▲
01/01/2008	06/12/2011	Z0	New Hire (NC)	01	New Hire		3 ▼

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

**Maintain HR Master Data**

Object... Personnel no.    
 Name   
 EEGroup  SPA Employees      PersA  Cultural Resources  
 EESubgroup  FT N-FLSAOT Perm      CostC  CULTURE RESOUR...

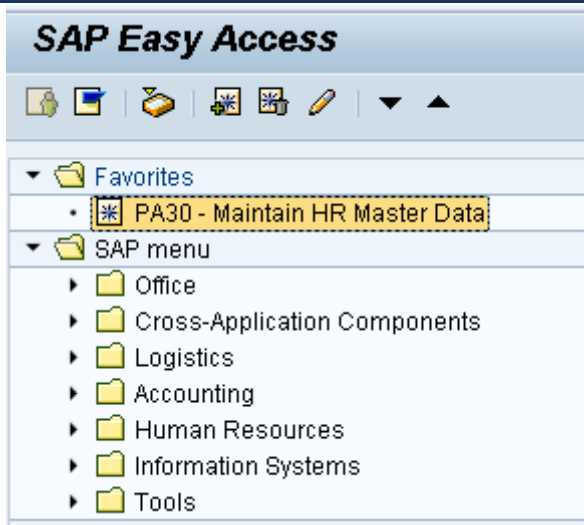
Basic Personal Data    Payroll    Benefits    Time    Addtl. Personal Data

Infotype text	s..	
Actions	✓	<input type="checkbox"/>
Organizational Assignment	✓	<input type="checkbox"/>
Personal Data	✓	<input type="checkbox"/>
Addresses	✓	<input type="checkbox"/>
Planned Working Time	✓	<input type="checkbox"/>
Basic Pay	✓	<input type="checkbox"/>
Family Member/Dependents	✓	<input type="checkbox"/>
I-9 Residence Status	✓	<input type="checkbox"/>
Additional Personal Data	✓	<input type="checkbox"/>

Period  
 Period  
 From  To   
 Today       Curr.week  
 All       Current month  
 From curr.date       Last week  
 To Current Date       Last month  
 Current Period       Current Year

Direct selection  
 Infotype       STy

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



62. The Transfer Action is complete, but we recommend reviewing via PA20 all infotypes that have been processed.

## ADDITIONAL RESOURCES

<b>Checklists</b>	<ul style="list-style-type: none"> <li>• Transfer Checklist <i>Personnel Administration &gt; Job Aids</i></li> </ul>
<b>Webinar</b>	<ul style="list-style-type: none"> <li>• Transfers <i>Conference Calls and Webinars &gt; HR Conference Call Webinars</i></li> </ul>