



DEMOTION ACTION

PER-65 | TRANSACTIONS ZPAA076, SWBP, PA40

PA

The purpose of this Business Process Procedure is to explain how to process a Demotion Action in the Integrated HR-Payroll System.

Trigger: There is a need to process a Demotion for one of the reasons listed in the Business Process Procedure Overview section.

Business Process Procedure Overview:

Demotion – a change in position and/or pay which results from inefficiency in performance or as a disciplinary action.

01 - Personal Conduct – Position - Disciplinary action resulting in employee assignment into a different position with a lower grade or lower journey market rate, or same banded class with a lower competency level.

02 - Gross Inefficiency – Position - Disciplinary action resulting in employee assignment into a different position with a lower grade or lower journey market rate, or same banded class with a lower competency level.

03 - Unsatisfactory Performance – Position - Disciplinary action resulting in employee assignment into a different position with a lower grade or lower journey market rate, or same banded class with a lower competency level.

04 - Personal Conduct – Job Reallocation - Disciplinary action resulting in employee's classification changing to a graded or banded class with a lower grade or journey market rate. (Employee's position may or may not be reallocated. If not, explain work-against in comments.)

05 - Gross Inefficiency – Job Reallocation - Disciplinary action resulting in employee's classification changing to a graded or banded class with a lower grade or journey market rate. (Employee's position may or may not be reallocated. If not, explain work-against in comments.)

06 - Unsatisfactory Performance – Job Reallocation - Disciplinary action resulting in employee's classification changing to a graded or banded class with a lower grade or journey market rate. (Employee's position may or may not be reallocated. If not, explain work-against in comments.)

07 - Personal Conduct – Salary - Disciplinary action resulting in salary reduction in same position.

08 - Gross Inefficiency – Salary - Disciplinary action resulting in salary reduction in same position.

09 - Unsatisfactory Performance – Salary - Disciplinary action resulting in salary reduction in same position.

40 - 115C Demotion - Disciplinary action resulting in a reduction in salary of a teacher or school administrator who was hired in a position subject to the G.S. 115C public education human resources system.

[**NOTE:** Specific reason for the demotion as outlined in G.S. 115C-325(c)(1) must be placed in the comments section.] Demotion does not include a suspension without pay, the elimination or reduction of a bonus payment or supplement, or a reduction in pay that results from elimination of a special duty.

Tips and Tricks:

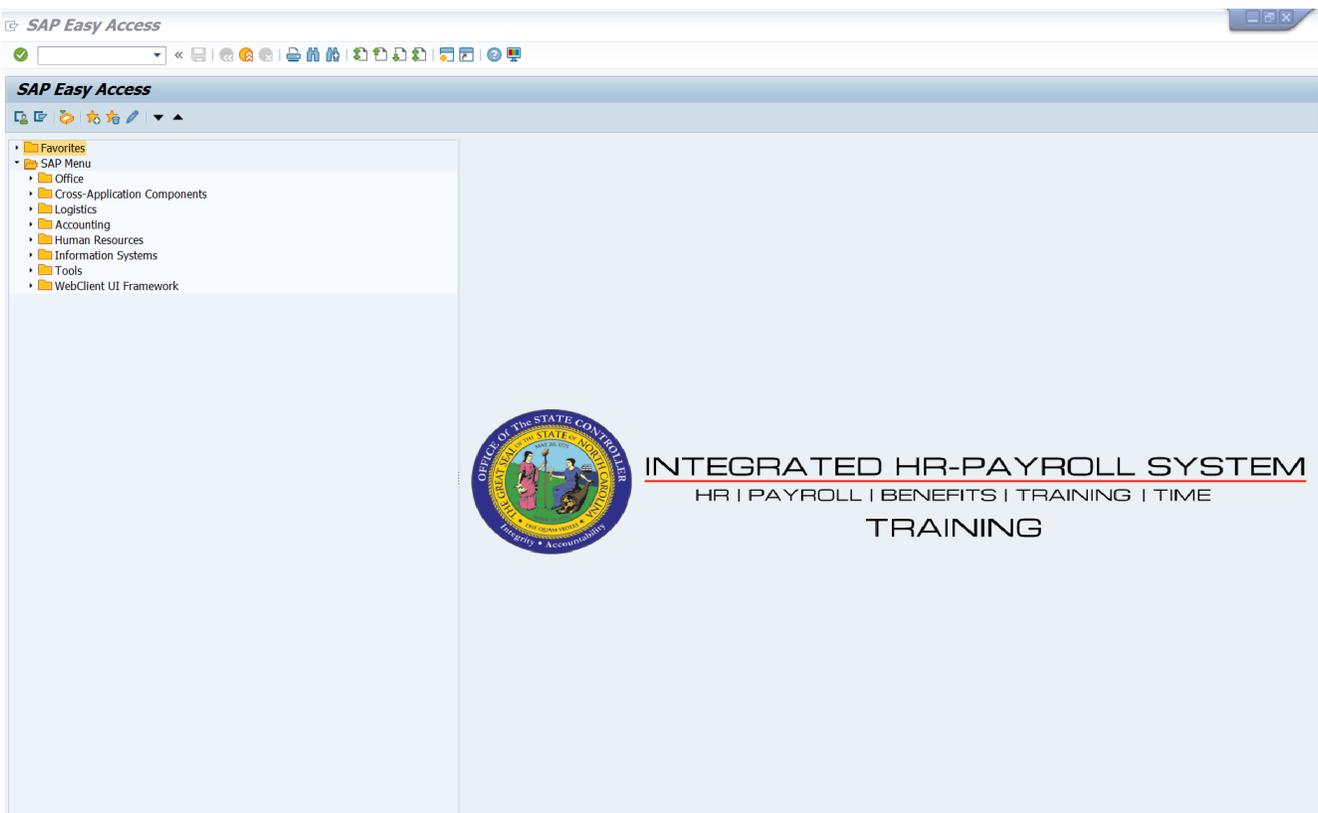
Prior to initiating any workflow, ensure the data being used is valid and appropriate.

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. Vera Glover

Last 4 digits (SSN) First Last

Effective on

Action Type Demotion (NC)

Reason Personal Conduct-Position

3. Update the following fields:

Field Name	Description	Values
Personnel No.	Unique employee identifier	Enter value in Personnel No. Example: 80000775
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: ZB
Reason	Reason for the action, such as Personal Conduct - Position	Enter value in Reason. Example: 01

4. Click the **Enter**  button.

Enter the Personnel Number of the individual to receive the Demotion. 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 can change the date to a day in the past or in the future.

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

Click Enter and verify the information is correct before proceeding.

Employee Action Request






Existing PCR No.	<input style="width: 90%;" type="text"/>			
Personnel No.	<input style="width: 100px;" type="text" value="80000775"/>	Vera Glover		
Last 4 digits (SSN)	<input style="width: 50px;" type="text"/>	First	<input style="width: 100px;" type="text"/>	Last
Effective on	<input style="width: 100%; border: 1px solid #ccc;" type="text" value="09/01/2011"/>			
Action Type	<input style="width: 30px;" type="text" value="ZB"/>	Demotion (NC)		
Reason	<input style="width: 30px;" type="text" value="01"/>	Personal Conduct-Position		

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 Vera Glover Action: Demotion (NC)

Last 4 digits(SSN) Reason: Personal Conduct-Position

Effective on Chng St:

CURRENT		PROPOSED	
Pers.Area	<input type="text" value="4601"/> Cultural Resources	Pers.Area	<input type="text" value="4601"/> Cultural Resources
Subarea	<input type="text" value="NC01"/> 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="B1"/> FT S-FLSAOT Perm	EE Subgrp	<input type="text" value="B1"/> FT S-FLSAOT Perm
Org. Unit	<input type="text" value="20010148"/> CR CDS A&H HIS RES A&R ST	Org. Unit	<input type="text" value="20010163"/> CR CDS A&H HIS RES A&R ST
Job	<input type="text" value="30000289"/> Processing Assistant IV	Job	<input type="text" value="30000288"/> Processing Assistant III
EE Position	<input type="text" value="65002237"/> Processing Assistant IV	EE Position	<input type="text" value="60083381"/> Processing Assistant III

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="6R59"/> Level <input type="text" value="6R"/>	Pay Scale Group	<input type="text" value="6R57"/> Level <input type="text" value="6R"/>
Annual Salary	<input type="text" value="24,695.00"/> Hrly Sal <input type="text" value="0.00"/>	Annual Salary	<input type="text" value="23,460.00"/> Hourly Salary <input type="text"/>
	Calc Step - <input type="text" value="0"/>		Calc Step - <input type="text" value="0"/> <input type="text" value="5.00"/> -
	Min <input type="text" value="24,092.00"/>		Max <input type="text" value="35,980.00"/> Next Inc Date <input type="text"/>

Dates

Last day worked

6. Update the following fields:

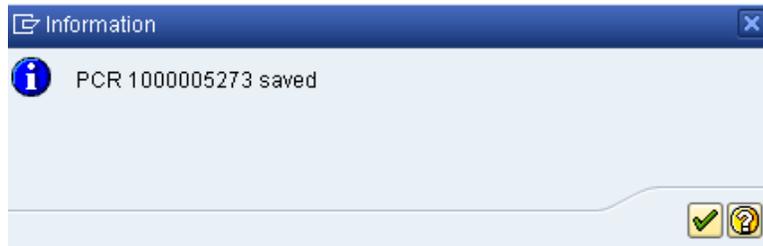
Field Name	Description	Values
EE Position	New position number	Enter value in EE Position. Example: 60083381
Annual Salary	Employee's annual basic pay	Enter value in Annual Salary. Example: 23,460

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.

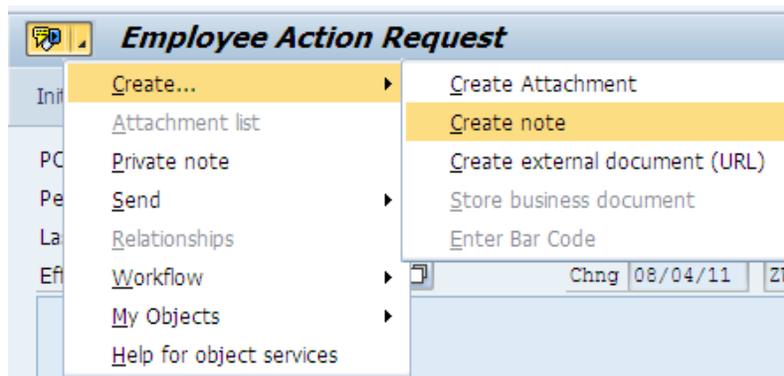
8. Click the **Save (Ctrl+S)**  button.

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 can 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.

This note and attachment area gets attached to this specific PCR only. It will follow the PCR through the approval/rejection process and live with the PCR into the future. When the PCR has been approved, and you are processing the Action (such as a New Hire action), you will need to recreate any notes or attachments if they need to be attached to the Action record as well.

Notes entered during PA Workflow must follow OSHR's Action Notes Template:

<https://www.osc.nc.gov/documents/action-notes-template>

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: Demotion 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: 1000005273
 Personnel Number: 80000775 Vera Glover
 Last 4 digits(SSN): [] [] [] []
 Effective on: 09/01/2011 Chng: 08/31/11 ZWFINOMPA031 St: D

Action: ZB Demotion (NC)
 Reason: 01 Personal Conduct-Position
 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	B1 FT S-FLSAOT Perm	EE Subgrp	B1 FT S-FLSAOT Perm
Org. Unit	20010148 CR CDS A&H HIS RES A&R ST	Org. Unit	20010163 CR CDS A&H HIS RES A&R ST
Job	30000289 Processing Assistant IV	Job	30000288 Processing Assistant III
EE Position	65002237 Processing Assistant IV	EE Position	60083381 Processing Assistant III

Basic Pay

Current	Proposed
Pay Scale type: 01 Graded	Pay Scale type: 01 Graded
Pay Scale Area: 01 Annual Salaries	Pay Scale Area: 01 Annual Salaries
Pay Scale Group: 6R59 Level: 6R	Pay Scale Group: 6R57 Level: 6R
Annual Salary: 24,695.00 Hrly Sal: 0.00	Annual Salary: 23,460.00 Hourly Salary: []
Calc Step - 0	Calc Step - 0 5.00 -
Min: 24,092.00	Min: []
Max: 35,980.00	Max: []
	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 Demotion 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 Demotion (NC)

Reason Personal Conduct-Position

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

19. The **Initiate Demotion Action** is complete.

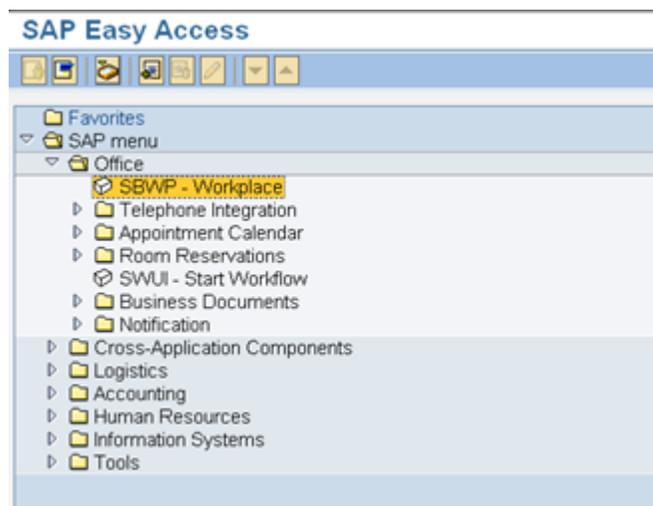
After Workflow Approvals have been received, process with the Complete Demotion Action process.

Instructions for Completing The Action

Access Transaction:

Via Menu Path: SAP menu ==> Office ==> SBWP – Workplace

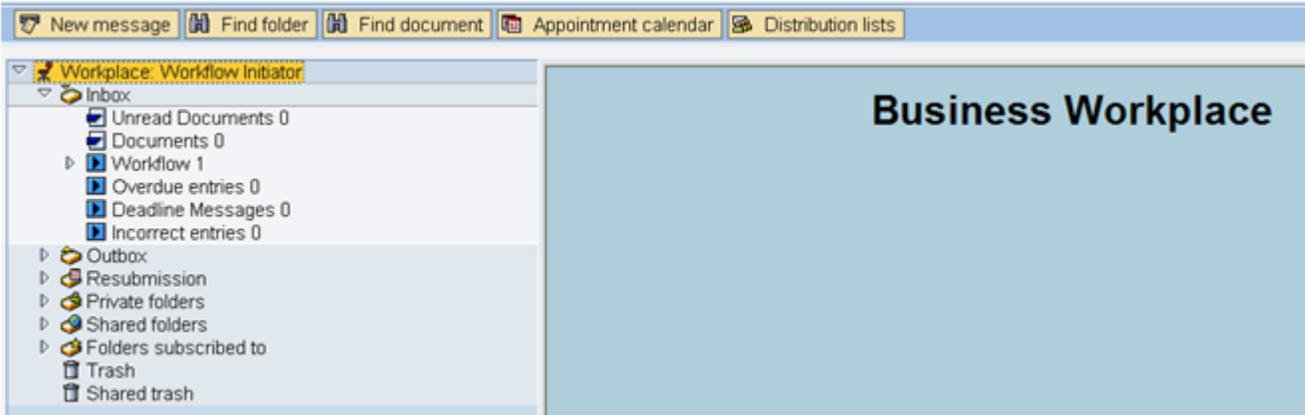
Via Transaction Code: SBWP



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

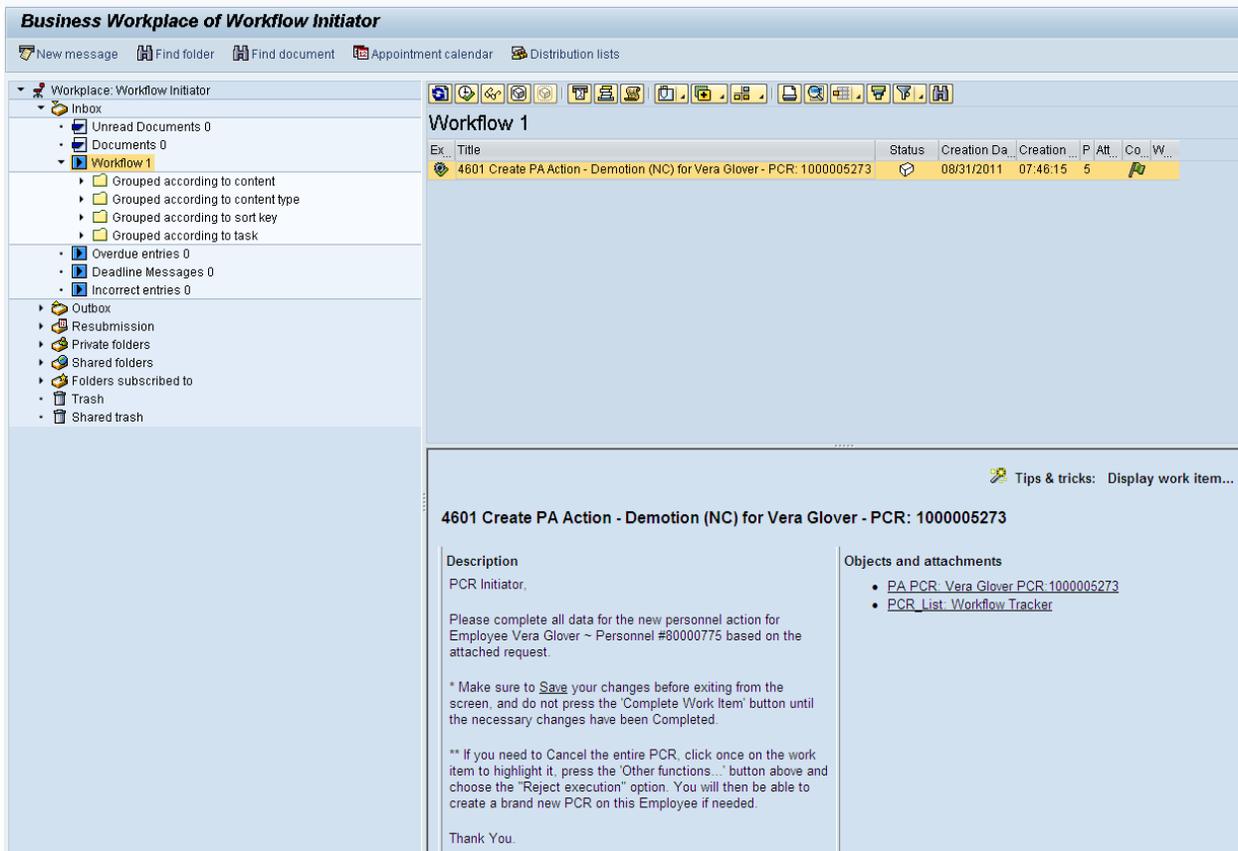
These instructions assume you have already initiated the Demotion Personnel Change Request (PCR) in workflow, and you have an approved PCR ready to be processed as a Demotion in the system.

Business Workplace of Workflow Initiator



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

You can process using step 22 or step 23.

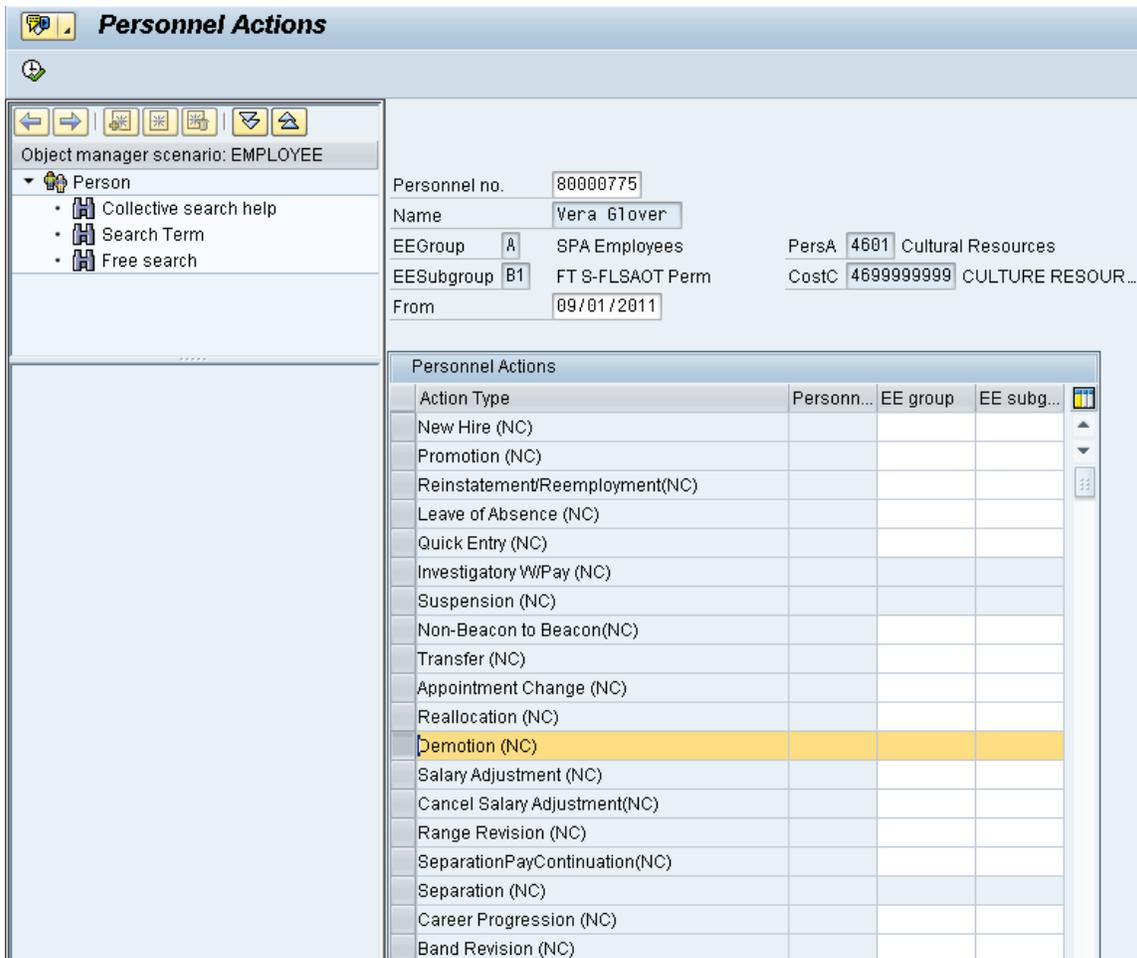


22. Select the PCR **4601 Create PA Action - Demotion (NC) for Vera Glover - PCR: 1000005273** row.

Double-click on row.

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

A list of your approved (or rejected) PCRs are listed on the right side of the screen. Select the PCR to be processed and click Execute (or double-click the PCR). You can view the PCR details and/or Workflow Tracker details prior to executing the PCR if desired. Once executing the PCR, the Demotion 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 **Demotion (NC)** action type.

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

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

Copy Actions (0000)

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

Personnel action

Action Type
 Reason for Action Personal Conduct-Position

Status

Customer-specific
 Employment
 Special payment

Organizational assignment

Position Processing Assistant III
 Personnel area Cultural Resources
 Employee group SPA Employees
 Employee subgroup FT S-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 OSHR 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 Name

EEGroup SPA Employees PersA Cultural Resources

EESubgroup FT S-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 S-FLSAOT Perm Contract

Organizational plan

Percentage

Position 203040002221
Processing Assistant ...

Job key Prc Ast
Processing Assistant ...

Org. Unit 48020302238
CR CDS A&H HIS RE...

Org.key

31. Click the **Enter**  button.

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

 **CRITICAL!** If the contract field is completed on the previous IT0001, it will copy to the new IT0001.

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

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

S 65002237 Processing Assistant IV

Create on 09/01/2011

Yes No Cancel

33. Click the **Yes** button.

Click **Yes** to create a vacancy in the position out of which the individual is leaving.

S 60083381 Processing Assistant III

Delimit on 08/31/2011

Yes No Cancel

34. Click the **Yes** button.

Click **Yes** to delimit (put an end date to) the vacancy of the position into which the individual is being demoted. If you click **No**, the position will show up as unoccupied on vacancy reports.

 Information	<p>Use PO13D to review infotype 1001, B008 holder relationship was delimited or created. IT1007 Vacancy – controls if shows up on the BI Report correctly.</p>
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Copy Planned Working Time (0007)

Work schedule

Personnel No: [REDACTED] Name: [REDACTED]

EEGroup: A SPA Employees PersA: 4601 Natural and Cultural Resources

EESubgroup: A1 FT N-FLSAOT Perm Statu: Active

Start: [REDACTED] To: 12/31/9999 Chg.: [REDACTED]

Work schedule rule

Work schedule rule: D01N08GN MTWHF-8,SaS-O WSR Finder

Time Mgmt status: 1 - Positive Time Recording

Working week: Wk - Sun (mdnt) - Sat

Part-time employee

Working time

Employment percent	100.00
Daily working hours	8.00
Weekly working hours	40.00
Monthly working hrs	173.33
Annual working hours	2080.00
Weekly workdays	0.00

Additional fields

Telework Eligible

35. 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 the Integrated HR-Payroll team members.



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

36. 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)

37. Click the **Enter**  button.

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

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

39. 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.

Wage Type	Long Text	O. Amount	Curr. I. A.	Number/Unit	Unit
1000	Regular Salary	1,955.00	USD		

40. Update the following field:

Field Name	Description	Values
Reason	Reason for the action such as Demotion	Enter value in Reason. Example: ZB

41. 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 Demotion (ZB), 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.

Copy Objects on Loan (0040)





Personnel No	<input type="text" value="80000775"/>	Name	<input type="text" value="Vera Glover"/>
EEGroup	<input type="text" value="A"/> SPA Employees	PersA	<input type="text" value="4601"/> Cultural Resources
EESubgroup	<input type="text" value="B1"/> FT S-FLSAOT Perm	Statu	<input type="text" value="Active"/>
Start	<input type="text" value="09/01/2011"/> to		<input type="text" value="12/31/9999"/>

Objects on Loan

Object on loan	<input type="text" value="01"/>	State ID
Number/unit	<input type="text" value="1"/>	Pieces

Loan object no.

Comments

Line 1	<input style="width: 95%;" type="text"/>
Line 2	<input style="width: 95%;" type="text"/>
Line 3	<input style="width: 95%;" type="text"/>

42. Review and update the fields as appropriate.

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

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

Personnel Actions

Object manager scenario: EMPLOYEE

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

Personnel no.

Name

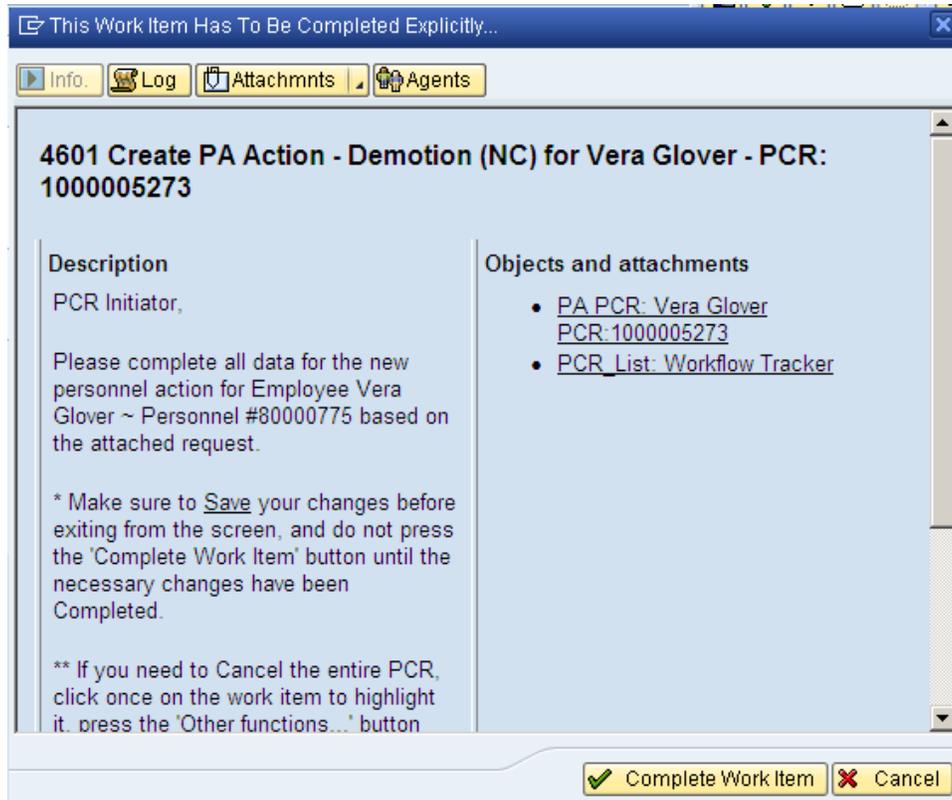
EEGroup SPA Employees PersA Cultural Resources

EESubgroup FT S-FLSAOT Perm CostC CULTURE RESOUR...

From

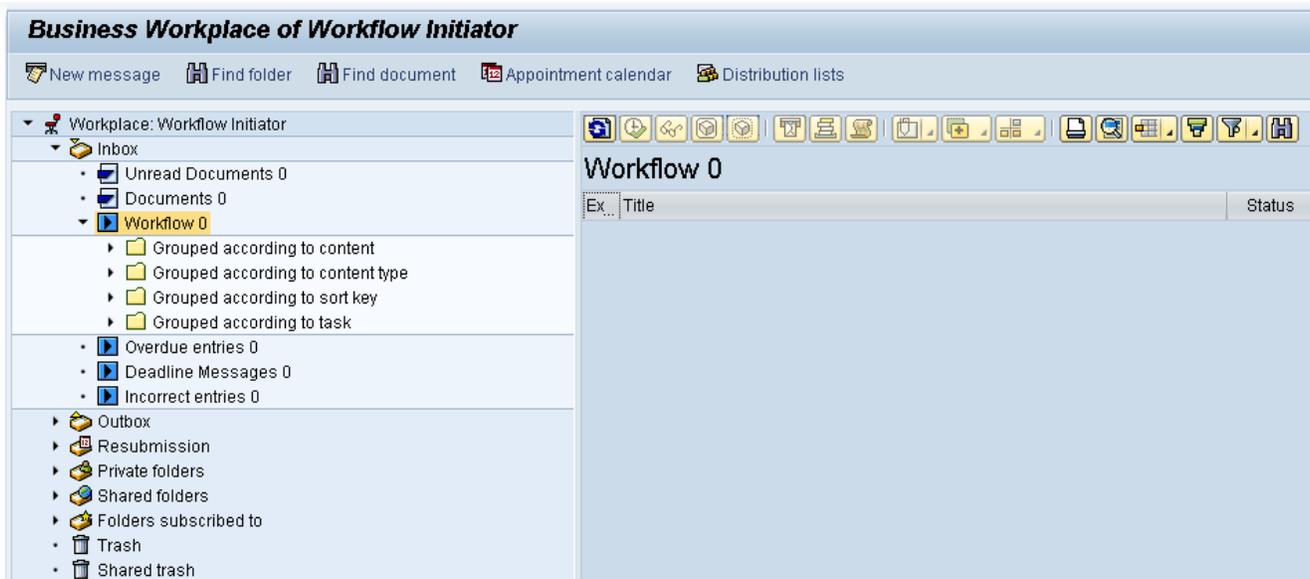
Action Type	Personn...	EE group	EE subg...
New Hire (NC)			
Promotion (NC)			
Reinstatement/Reemployment(NC)			
Leave of Absence (NC)			
Quick Entry (NC)			
Investigatory W/Pay (NC)			
Suspension (NC)			
Non-Beacon to Beacon(NC)			
Transfer (NC)			
Appointment Change (NC)			
Reallocation (NC)			
Demotion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

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



45. 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 can complete the PCR in workflow.



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

You can remain in this SAP Business Workplace and process additional PCRs, or click the Back to return to the main SAP screen.



47. The **Demotion Action** is complete, but we recommend reviewing via PA20 all infotypes that have been processed.

Additional Resources

Training HELP website: https://www.osc.nc.gov/state-agency-resources/training/training_help_documents

Change Record

Change Date: 2/5/21 (B. Johnson)

Changes: – Infotype 0007