



Reallocate Position (Actions 103 – 108 & 121)

See **Change Record** at end of document for updates to this BPP.

Trigger:

A position is assigned to a different level and Job classification.

NOTE: A position must be reallocated (OM) prior to the person being reallocated (PA).

Business Process Procedure Overview:

Reallocation actions are performed in the HR/Payroll system when a position is assigned to a different level and Job classification:

1. Selection of a Job (creating a new relationship between the position and new job)
2. Assignment of a Supervisor (creating a new relationship between the position and position of the supervisor) (if changing)
3. Assignment of Employee Group/Employee Subgroup (if changing)

All fields are mandatory and must be maintained. If no changes are needed to these fields, simply select and copy the current values (left hand side) into the “proposed value” (right hand side) for:

- Supervisor and/or
- Employee Group/Employee Subgroup

Otherwise, manually enter or use the standard SAP search to select the Position. Also, use the drop-down list to select the appropriate Employee Group/Employee Subgroup.

Please reference the State Personnel Manual for additional business process questions regarding when to execute each of the reallocation actions. Please note that the action codes (numerical values) are SAP specific and will not appear in the State Personnel Manual:

- Reallocate Position Up (103)
- Reallocate Position Down (104)
- Reallocate Position Horizontal (105)
- Reallocate Position – Pay Plan Change (121)
- Position Adjustment from Auth (106)
- Reallocate Position Differential (107)
- Remove Position Differential (108)

103 - Reallocate Position Up: Used to assign a Position to a Job with a higher pay grade within the same pay plan.

- Example: GR70 to GR71

104 - Reallocate Position Down: Used to assign a Position to a Job with a lower pay grade within the same pay plan.

- Example: GR68 to GR65

105 - Reallocate Position Horizontal: Used to assign a Position from one Job to another Job within the same pay plan, grade, and range. Is also used for reallocations from FR to FR.

- Example: GR68 to GR68

121 - Reallocate Pay Plan Change Used to assign a Position from a Job in one pay plan to a Job in another pay plan.

- Examples: Graded to Banded, Banded to Graded.

NOTE: If a Position is reallocated from one *Banded* Job to another *Banded* Job, use Market rates to determine if the reallocation is up, down, or horizontal. The Market rate is the rate determined for each competency level (Contributing, Journey, Advanced) of the job class. Compare the Market rate of the old Job to the new Job. If higher, use Reallocate Up. If lower, use Reallocate Down. If the same, use Reallocate Horizontal.

106 - Position Adjustment from Auth: Used to adjust a Position differently (Higher/Lower) from Budget Authorization.

107 - Reallocate Position Differential: Used to adjust a Position to a Job classification at a higher salary grade due to a recruitment or retention problem at a specific location.

108 - Remove Position Differential: Used to return a Position to a Job with a lower salary grade when the higher grade is no longer needed.

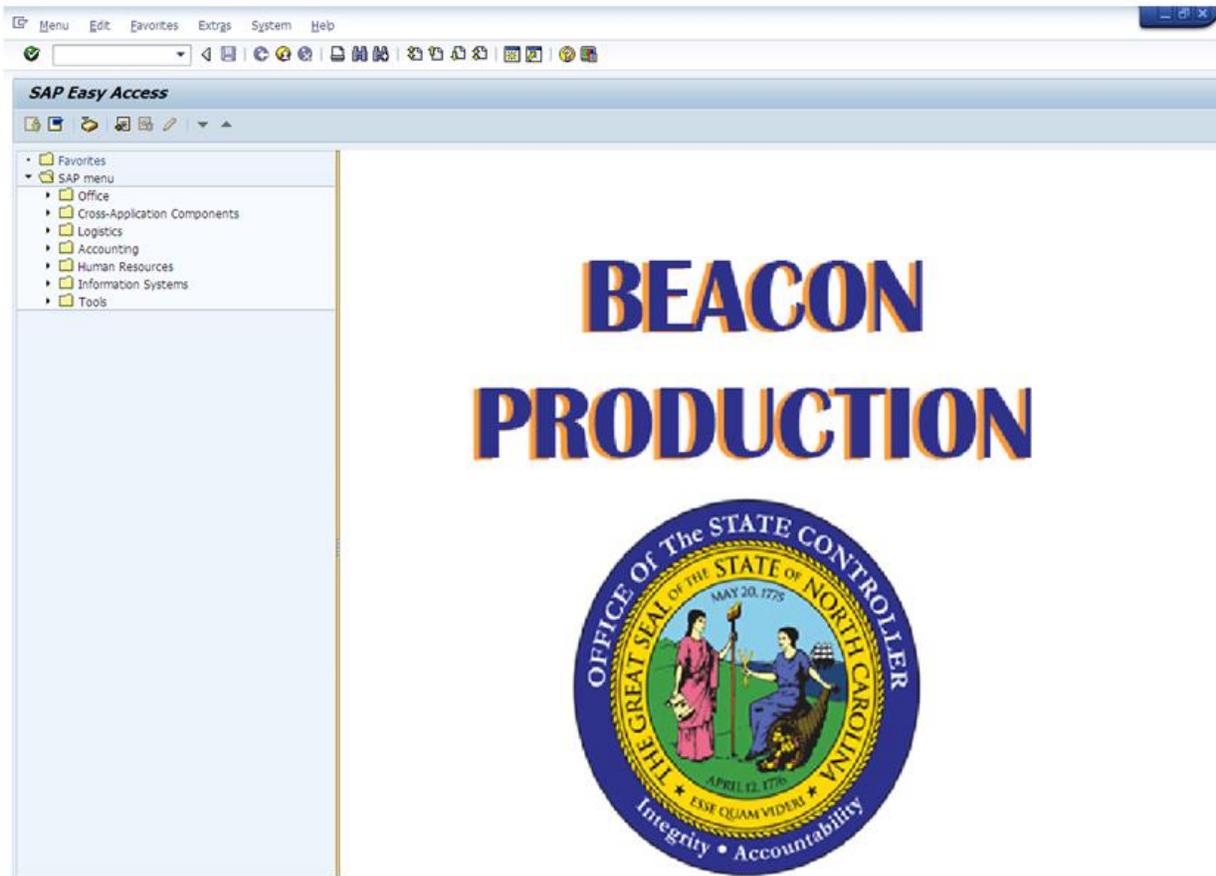
Tips and Tricks:

See the *OM 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: **Organizational Management > Job Aids.**

Access Transaction:

Via Menu Path:	NOTE: <i>Your menu path may contain this custom transaction code depending on your security roles.</i> <i>This is a custom transaction. It is not in the SAP Menu.</i>
Via Transaction Code:	ZOMA069

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: ZOMA069

2. Click the **Enter**  button.



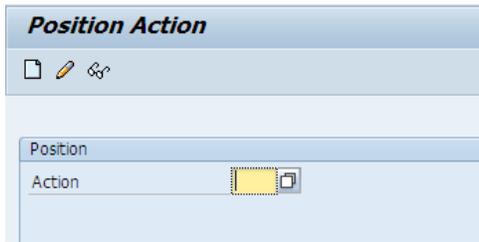
Information

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

- From the menu at the top of the screen, choose **Favorites > Insert Transaction**.
- Type in **ZOMA069**.
- Click **Enter**.

To see the transaction code displayed in front of the link in your favorites, from the menu at the top of the screen:

- Choose **Extras > Settings**.
- Place a check next to **Display Technical Names**.
- Click **Enter**.



3. Update the following field:

Field Name	Description	Values
Action	A one to four character code that represents an action. An action is a series of procedures that must be completed in order to achieve a specific objective.	Enter value in Action. Example: 103

4. Click the **Enter**  button.

NOTE: The action number to reallocate a position up is 103. Use the matchcode search for additional OM action options available from this transaction as appropriate.

Act.	Action text
100	Create New Position
102	Re-Establish Position
103	Reallocate Position Up
104	Reallocate Position Down
105	Reallocate Position Horizontal
106	Position Adjustment from Auth
107	Reallocate Position Differential
108	Remove Position Differential
113	Position Transfer
115	Position Hours Change
116	Position Employee Group/ Subgroup Change
118	Position Competency Level Change
121	Reallocate Pay Plan Change
122	Position County Change
124	Change Supervisor of Position

By clicking Enter, you will validate the action you have requested and display the date fields for entry.

Position Action

Position

Action	103	Reallocate Position Up
Position	60081262	Artist Illustrator II
Valid from	12/01/2012	to 12/31/9999

5. Update the following fields:

Field Name	Description	Values
Position	The SAP eight-digit position code (perform a search for the correct position title) for the position to be maintained	Enter value in Position. Example: 60081262
Valid from	Beginning date of the organizational assignment which identifies the start of a validity period. For existing Legacy positions, the start date was established as 01/01/1900. NOTE: The Validity period, also referred to as the effective date range, identifies the lifespan assigned to an object or an infotype record, or the period of time that these items "exist". Validity periods consist of a start date and end date.	Enter Effective date of the Reallocation: Example: 12/01/2012

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

Enter the appropriate effective date value for the reallocation action. The “Valid From” date will serve as the effective date of the position action. The “Valid To” date will always default to high date (12/31/9999).

If the position is held by an employee, the effective date for this position action must be the same as the effective date for the corresponding personnel action. Please contact the appropriate AgencyHR staff to coordinate the required OM and PA actions. Use either the PPOSE transaction or the PO13 transaction to determine if the position is currently held by an employee.

 Information	<p>The Change  button is used to change information on a request for a new position PRIOR to it being submitted to workflow. Once the form has been completed, you will Save the record. A PCR (Personnel Change Request) number will be displayed. This PCR number does not mean the form has been submitted to workflow yet; you must still submit the form to workflow. If you have not yet submitted the form to workflow for approval, you may use the PCR number (with the PCR date) to make changes and save those changes to the latest record.</p> <p>Once a position request has been submitted to workflow (it has received a PCR number and has been submitted to workflow), it may not be changed until the PCR number has gone through the entire workflow approval process and either successfully been approved, rejected, or cancelled.</p>
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Reports to	Contains the eight-digit position number that represents the supervising (chief) position for the organizational unit	Enter value in Reports to. Example: 60081258
Employee group	Drives benefits eligibility, leave and pay calculations	Enter value in Employee group Example: SPA Employees
EE subgroup	Code identifying the employee as subject to FLSA overtime, full/part time status, and other calculation rules	Enter value in EE subgroup. Example: B1

Reallocate Position Up - CREATE

Position Header

Position: 60081262 Artist Illustrator II Org Unit: 20009972 COM Marketing
 PCR Number: Reports To: 60081258 Director Of Marketing
 Valid from: 12/01/2012 to 12/31/9999 Supervisor: WF Status:
 Holder: Personnel area: 4301 Commerce

General Time Cost

Current Values New Values

Position Relationships

Position abbr.	200000032009	Graph Art
Position Name	Artist Illustrator II	Fine Arts Graphic Artist
Job	30001376 Artist Illustrator II	30001377 Artist Illustrator III
SOC Code	271013 Fine Artists, Incl Paintrs, Sculp & Illus	271013 Fine Artists, Incl Paintrs, Sculp & Illus
Reports To	60081258 Director Of Marketing	60081258 Director Of Marketing

Employee Group/Subgroup

Employee group: SPA Employees SPA Employees
 EE subgroup: B1 FT S-FLSAOT Perm B1 FT S-FLSAOT Perm

Pay Grade Pay Scale Pay Grade Pay Scale

Ctry Grouping	USA	Ctry Grouping	USA
Pay grade type	01 Graded	Pay grade type	01 Graded
Pay grade area	01 Annual Salaries	Pay grade area	01 Annual Salaries
Pay grade	GR65	Pay grade	GR70
Pay grade level	GR	Pay grade level	GR
Currency key	USD	Currency key	USD
Pay grade	31,622.00	Pay grade	38,174.00
To	49,290.00	To	61,632.00
Reference salary	40,456.00	Reference salary	49,903.00
Time unit	Annually	Time unit	Annually

8. Click the **Enter**  button.

The system will copy the existing data from the position and default it on screen. The Header section will default values in these fields:

- Organizational Unit Object Id and Abbreviation
- Reports To (Supervisor's personnel number and name)
- Valid from (Effective Date based on the value entered on the prior screen)
- Valid to (End date which defaults as 12/31/9999)
- Supervisor (Position's Supervisor)
- Holder (Person assigned to the Position, if any. Position may be vacant.)
- Workflow (WF) Status
- Personnel area (Agency)

On the General tab, the system will display proposed values. This includes:

- Position abbr.
- Position Name
- Job
- SOC Code
- Reports To (Supervisor's personnel number and name)
- Employee group (Subject/Not subject to FLSA and overtime provisions)
- Employee subgroup (Work schedule grouping)

The PayGrade/Pay Scale tab will default based on the "Job" that is assigned to the position.

NOTE: The data used in this example is provided for sample purposes only. The data will change depending on the Agency and specific position being created.

The best practice is to enter any data as appropriate, review all data, and click Enter to allow the system to validate the data.

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.

9. Click the **Save (Ctrl+S)**  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 Services for Objects (note attachment) until you have saved it at least once. (See below) 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.

NOTE: On an OM workflow item, you will not see the Initiate Workflow button until you have saved the information at least once.

10. Click the **Time**  tab button.

11. Update time settings if they are changing

Field Name	Description	Values
Night Shift Prem Rate	Pay rate increase for Night Shift premium. If OSP has approved a rate other than the default of 10%, the rate as a percentage must be entered in the rate field.	Enter value in Night Shift Prem Rate. Example: 10

12. Click the **Enter**  button.

The Time tab contains the fields required for time entry and payroll calculation rules. A position can have one or more fields. The Premium rates are determined from the data saved on the Position in the HR/Payroll system, not what a person enters on their time sheet, so the person hired into this position will automatically receive the premiums which are requested here when they submit their time.

NOTE: In this example we have changed the Night Shift Premium from 0% to 10%.

- **Overtime Compensation (IT 9005)** - Stores settings related to overtime compensation.
 - If time worked beyond the overtime limit (40 hours, etc.) is to be paid or accumulated as compensatory time, the position must have a valid IT9005 record (which is this area).
 - If overtime compensatory time is to be paid out (FLSA Subject only) or expired (FLSA Not-subject only) at a point earlier than 12 months from when it was earned, the Comp Aging

Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). The default is 365 days.

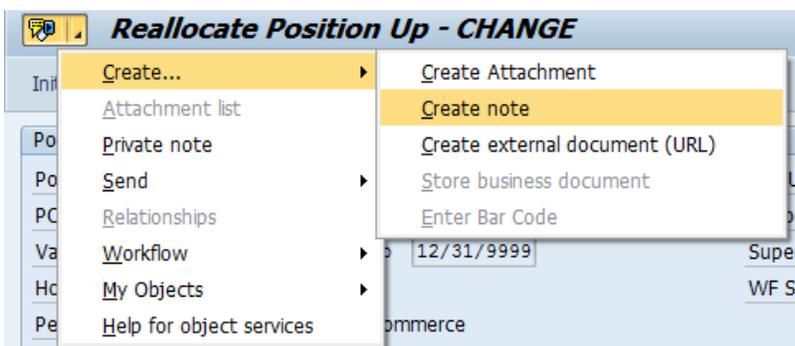
- If it is to be paid out immediately, the Immediate Payout checkbox should be checked. An IT9005 record is not required if the position is not eligible for overtime pay or compensation.
- **Holiday Payout Period (IT 9006)** - Indicates if holiday compensatory time is to be paid out (FLSA Subject only) or expired (FLSA Not-Subject only) at a point earlier than 12 months from when it was earned. The Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). The default is 365 days. If no record exists, the default value of 365 applies. If it is to be paid out immediately, the Immediate Payout checkbox should be checked.
- **Night Shift Prem Rate (IT 9007)** - Pay rate increase for Night Shift premium. If OSP has approved a rate other than the default of 10%, the rate as a percentage must be entered in the rate field.
- **Evening Shift Premium (IT 9008)** - Stores settings for positions that are eligible for evening shift premium. OSP approved rates other than the default of 10% must be entered in the rate field.
- **Weekend Shift Premium (IT 9009)** - Stores settings for positions that are eligible for weekend shift premium. The OSP approved rate other than the default of 10% must be entered in the rate field.
- **Holiday Premium Rate (IT9010)** - Pay rate increase for Holiday Pay. The OSP approved rate other than the default of 50% must be entered in the rate field.
- **On-call (IT 9011)** - Stores settings for positions that are eligible for On-Call compensation. The accrued box should be checked if the time is to be collected as On-Call comp time. The rate field must be populated with the OSP approved on-call rate.
- **Callback (IT 9012)** – Stores settings for positions that are eligible for Callback compensation. The decision to pay or award compensation is determined by the Callback Accrual checkbox.
- **Extended Duty (IT 9016)** – Stores settings for positions that are eligible for extended duty
- **Gap Hours (IT 9017)** – Positions eligible for Gap Hours Comp must have a valid IT9017 record. The decision to pay versus comp time is determined by the existence of the 9017 infotype. Gap Hours are additional hours for Subject- FLSA employees. The “Additional hours” are those hours caught in the gap between the minimum hours of work required and the overtime threshold. These hours are currently being paid at an hour-for-hour rate for Subject-FLSA employees.

The best practice is to enter any data as appropriate, review all data, and click Enter to allow the system to validate the data.

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



Information Notice that the Cost tab fields are grayed out. The initiator/requestor does not have access to enter information here.



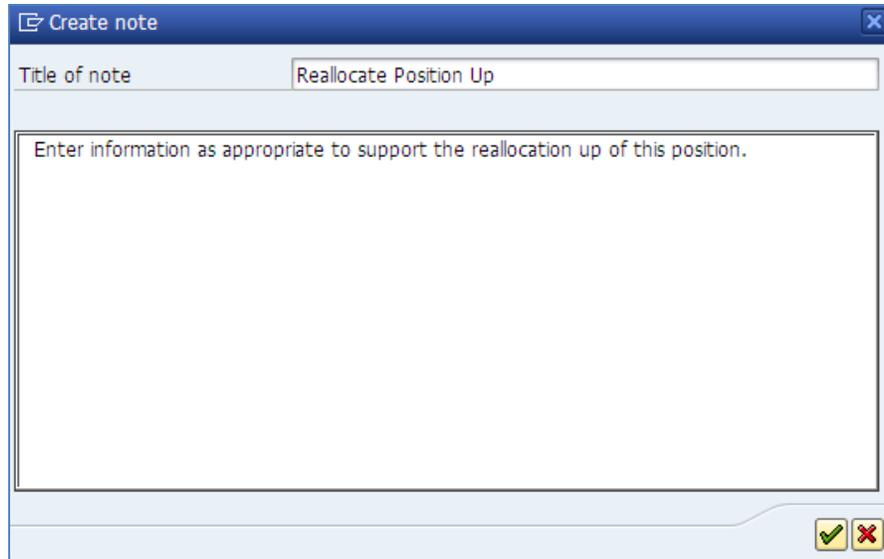
You will not be able to create a Services for Objects (note attachment) until you have saved it at least once. If you have already submitted the PCR to workflow, you will not be able to change the details, nor save any new information, only display the existing details.

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

15. Click **Create... >> Create note.**

You may enter any information that would be useful to the approvers down the line in the approval process 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.

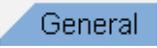
NOTE: PCR notes and attachments (Services for Objects) are not transferred to the Position; rather, they stay on the PCR. If you need a Position to have a note or attachment, you must add it to the **Position's** Services for Objects via PO13.



16. 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: Reallocate Position 60081262 Up
Long text	An open text field	Enter value in Long text. Example: text as appropriate

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

18. Click the **General**  tab button.

Reallocate Position Up - CHANGE

Initiate Work Flow

Position Header

Position	60081262	Artist Illustrator II	Org Unit	20009972	COM Marketing
PCR Number	5000002039		Reports To	60081258	Director Of Marketing
Valid from	12/01/2012	to 12/31/9999	Supervisor		
Holder			WF Status	D	Created
Personnel area	4301	Commerce			

General | Time | Cost

Current Values		New Values	
Position Relationships			
Position abbr.	200000032009	Graph Art	
Position Name	Artist Illustrator II	Fine Arts Graphic Artist	
Job	30001376 Artist Illustrator II	30001377 Artist Illustrator III	
SOC Code	271013 Fine Artists,Incl Paintrs, Sculp & Illus	271013 Fine Artists,Incl Paintrs, Sculp & Illus	
Reports To	60081258 Director Of Marketing	60081258 Director Of Marketing	
Employee Group/Subgroup			
Employee group	SPA Employees	SPA Employees	
EE subgroup	B1 FT S-FLSAOT Perm	B1 FT S-FLSAOT Perm	

Pay Grade		Pay Scale	
Ctry Grouping	USA	Ctry Grouping	USA
Pay grade type	01 Graded	Pay grade type	01 Graded
Pay grade area	01 Annual Salaries	Pay grade area	01 Annual Salaries
Pay grade	GR65	Pay grade	GR70
Pay grade level	GR	Pay grade level	GR
Currency key	USD	Currency key	USD
Pay grade	31,622.00	Pay grade	38,174.00
To	49,290.00	To	61,632.00
Reference salary	40,456.00	Reference salary	49,903.00
Time unit	Annually	Time unit	Annually

19. Click the **Enter**  button.

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

Notice the Save confirmation at the bottom of the screen. You may adjust and save the data as many times as you like prior to submitting to workflow. Once you click Save, the only way to change some information is to back out of the PCR and then go back in under Edit (Change, which is the pencil button). Once you Initiate Workflow, changes may not be made to this action.

The screenshot shows a software interface with a button labeled "Initiate Work Flow" highlighted by a red rectangle. Below the button is a form titled "Position Leader" with the following fields:

Position	60081262	Artist Illustrator II	Org Unit	20009972	COM Marketing
PCR Number	5000002039		Reports To	60081258	Director Of Marketing
Valid from	12/01/2012	to	12/31/9999	Supervisor	
Holder			WF Status	D	Created
Personnel area	4301	Commerce			

21. Click the **Initiate Work Flow**  button.

Select the Initiate Workflow button to send the Reallocate Position Up 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).

 Workflow submitted for Position: 60081262 PCR ID: 5000002039

Make note of the PCR ID.

If you do not want to initiate workflow at this time, you may access the Reallocate Position action using the Change (pencil button) mode after you have entered both the original validity dates and the position number from transaction code ZOMA069 at any point in the future up until the request has been submitted to workflow.

This position data in the HR/Payroll system is held in the Planned status until the workflow has gone through the entire approval process. If the workflow is approved, all of the data on the various infotypes will be moved into the Active status on the position. If the workflow is rejected or cancelled, the data will be moved into the Rejected status on the position.

Once position data has been saved, BEST Shared Services can also view this data on the position in the HR/Payroll system.

The screenshot shows a "Position Action" form with the following fields:

Action	103	Reallocate Position Up	
Position	60081262	Artist Illustrator II	
Valid from	12/01/2012	to	12/31/9999

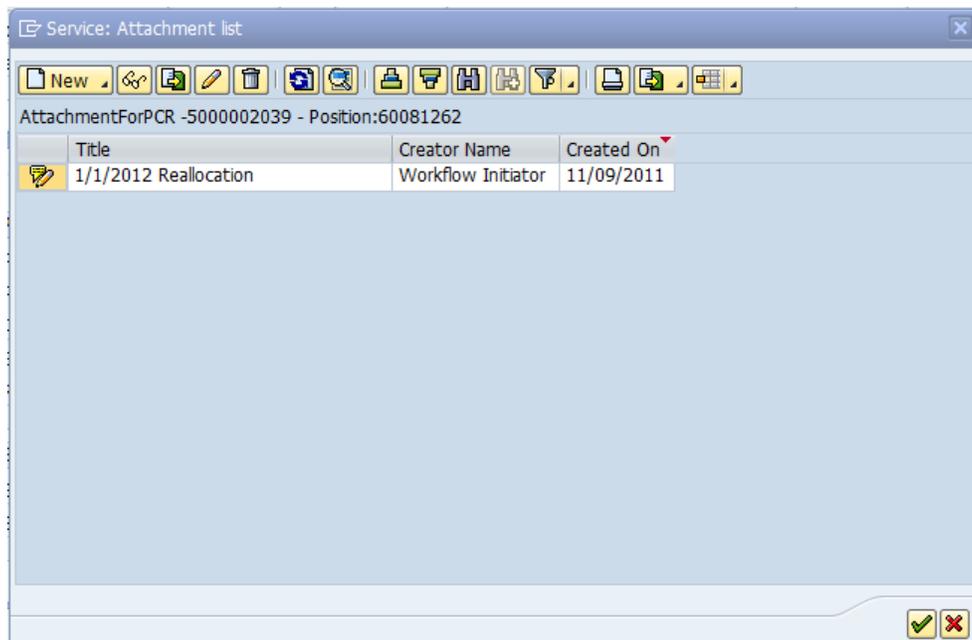
22. Click the **Display (F7)**  button.

Once the PCR has been submitted, you will only be able to display the data (including any notes and attachments which may have been saved on the PCR). Notes/comments can still be changed or edited regardless of where the PCR is in the Workflow process.



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

24. Click **Attachment list**.



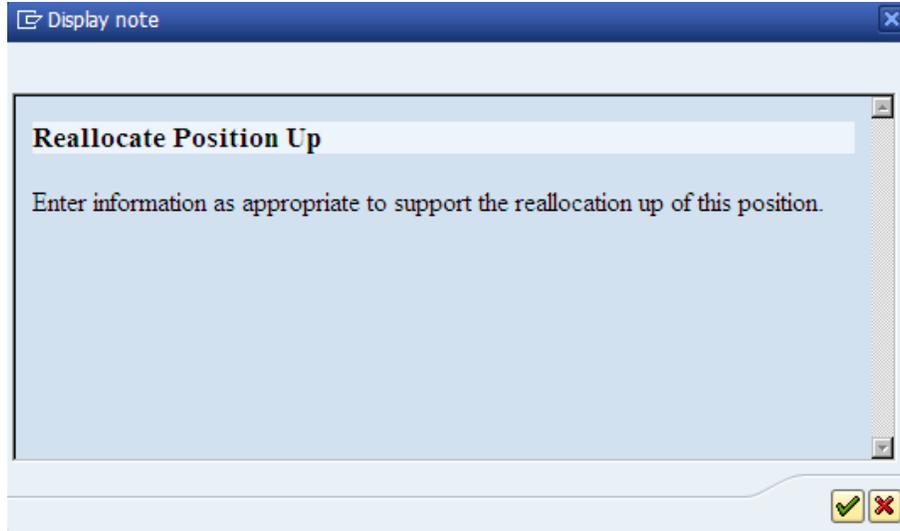
The PCR information is displayed. At any time, to display the notes/attachments on this PCR, choose the Services for Objects button and if the Attachments option is valid, there is at least 1 attachment available.

25. Click the **Note title**  **Reallocate Position Up** button.

26. Click the **Display (F7)**  button.

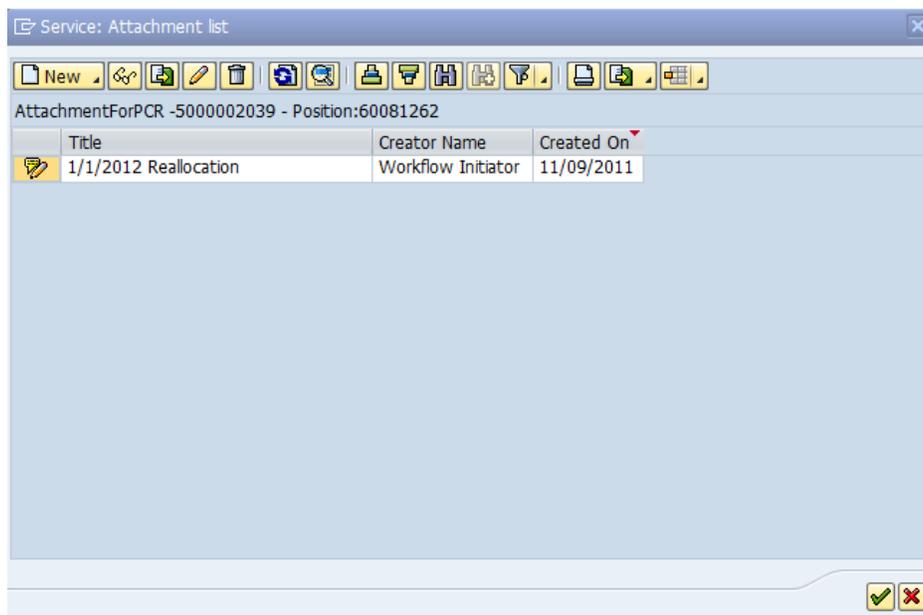
If you receive a window requesting you to choose between PCR attachments, choose the attachment corresponding to the PCR number with which you are working.

If multiple notes and/or attachments have been added to this PCR, they will be listed here. This is where you would display and copy the data if you wanted to also attach the notes/attachments to the corresponding Action once approved.



27. Click the **Copy (Enter)**  button.

Review the information as appropriate, and close the window when complete. This text may be copied using CTRL-C and pasted into another note attachment to an Action.



28. Click the **Continue (Enter)**  button.

Reallocate Position Up - DISPLAY

Position Header

Position	60081262	Artist Illustrator II	Org Unit	20009972	COM Marketing
PCR Number	5000002039		Reports To	60081258	Director Of Marketing
Valid from	12/01/2012	to 12/31/9999	Supervisor		
Holder			WF Status	N	In Process
Personnel area	4301	Commerce			

General | Time | Cost

Current Values		New Values	
Position Relationships			
Position abbr.	20000032009	Graph Art	
Position Name	Artist Illustrator II	Fine Arts Graphic Artist	
Job	30001376 Artist Illustrator II	30001377 Artist Illustrator III	
SOC Code	271013 Fine Artists, Incl Paintrs, Sculp & Illus	271013 Fine Artists, Incl Paintrs, Sculp & Illus	
Reports To	60081258 Director Of Marketing	60081258 Director Of Marketing	
Employee Group/Subgroup			
Employee group	SPA Employees	SPA Employees	
EE subgroup	B1 FT S-FLSAOT Perm	B1 FT S-FLSAOT Perm	

Pay Grade		Pay Scale	
Ctry Grouping	USA	Ctry Grouping	USA
Pay grade type	01 Graded	Pay grade type	01 Graded
Pay grade area	01 Annual Salaries	Pay grade area	01 Annual Salaries
Pay grade	GR65	Pay grade	GR70
Pay grade level	GR	Pay grade level	GR
Currency key	USD	Currency key	USD
Pay grade	31,622.00	Pay grade	38,174.00
To	49,290.00	To	61,632.00
Reference salary	40,456.00	Reference salary	49,903.00
Time unit	Annually	Time unit	Annually

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

Position Action

Position

Action  103  Reallocate Position Up

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

The system task is complete.

Change Record

Change Date: 7/6/15	Changed by: D Lyle
Changes:	<p>Document Title changed</p> <ul style="list-style-type: none"> • Added <i>121</i> <p>Business Process Overview > Bullets</p> <ul style="list-style-type: none"> • Added: <i>Reallocate Position – Pay Plan Change</i> • Revised Descriptions: <ul style="list-style-type: none"> ○ 103 - Reallocate Position Up ○ 104 - Reallocate Position Down ○ 105 - Reallocate Position Horizontal ○ 121 - Reallocate Pay Plan ○ 106 - Position Adjustment from Auth ○ 107 - Reallocate Position Differential ○ 108 - Remove Position Differential <p>Page 5: new screen capture of drop-down list</p>

Additional Resources

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

Job Aids	<p>OM Fields</p> <ul style="list-style-type: none"> ○ <i>OM folder > Job Aids folder</i>
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