APPOINTMENT CHANGE ACTION

PER-61 | TRANSACTIONS ZPAA076, SWBP, & PA40

PA

The purpose of this Business Process Procedure is to explain how to complete an appointment change action in the Integrated HR-Payroll System.

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

Business Process Procedure Overview:

An appointment change is defined as the change in the employee's type of appointment. Examples include, but are not limited to:

- Permanent
- Probation
- Time-limited
- Time-limited probationary

NOTE: Employee is not changing position numbers.

An Appointment Change occurs when an employee has successfully completed his or her probationary period and receives an appointment to either a permanent or a time-limited position. Based upon the supervisor's recommendation, the employee may transition from probationary status at two (2) years. In order for the employee to receive an increase in salary, an Appointment Change Action (rather than a Salary Adjustment Action) must be used. This is because the employee subgroup must be changed. When you create an Appointment Change, not all infotypes that display will require that you change information. Your agency, as well as the type of appointment change, determines this. Here are some of the fields that you may need to change:

- Employee Subgroup
  - if moving from Full-Time (FT) to Part-Time (PT), or vice versa
  - if moving from probationary or trainee to permanent
- Planned Working Time – if moving from FT to PT, or vice versa
- Basic Pay – if moving from FT to PT
- Monitoring of Tasks – example, trainee progression

Reasons:

- **(08)** Supplemental to Probation - Employee is changing from Temporary status to a Probationary status, within the same position, but the employee must serve a probationary period.
- **(09)** Supplemental to Permanent - Employee is changing from a Temporary status to a Permanent status, within the same position, in which the employment in the Temporary position satisfies the probation period and credentials have been verified.
- **(11)** Probation to Permanent - Employee has completed the probationary period.
- **(03)** Probation/Time-Limited to Time-Limited - Employee has completed the probationary time-limited period.

- **(02)** Time-Limited to Permanent - Employee has exceeded 36 months of employment or position is being made permanent.
- **(22)** Time-Limited to Probation - Employee is changing from time-limited status to probationary status within the same position.
- **(04)** Part-Time to Full-Time - Employee hours will be 40.
- **(05)** Full-Time to Part-Time - Employee hours will be less than 40.
- **(06)** Change in Hours - Part-time hours changing
- **(07)** Extension of Appointment - (No money involved)
- **(10)** Intermittent to Probation - Employee status that requires a probationary period
- **(12)** Permanent to Time-Limited - Employee status that is time-limited
- **(13)** Permanent to Supplemental - Employee status that is Temporary
- **(14)** Permanent to Intermittent - Employee status that is Intermittent
- **(15)** Change in FLSA – Employee overtime eligibility status (FLSA) is changing.
- **(20)** Supplemental to Time-Limited - Employee is changing from Temporary status to a Time-Limited status.
- **(21)** Supplemental to Probation TL - Employee is changing from Temporary status to Probation Time-Limited status.

Tips and Tricks:

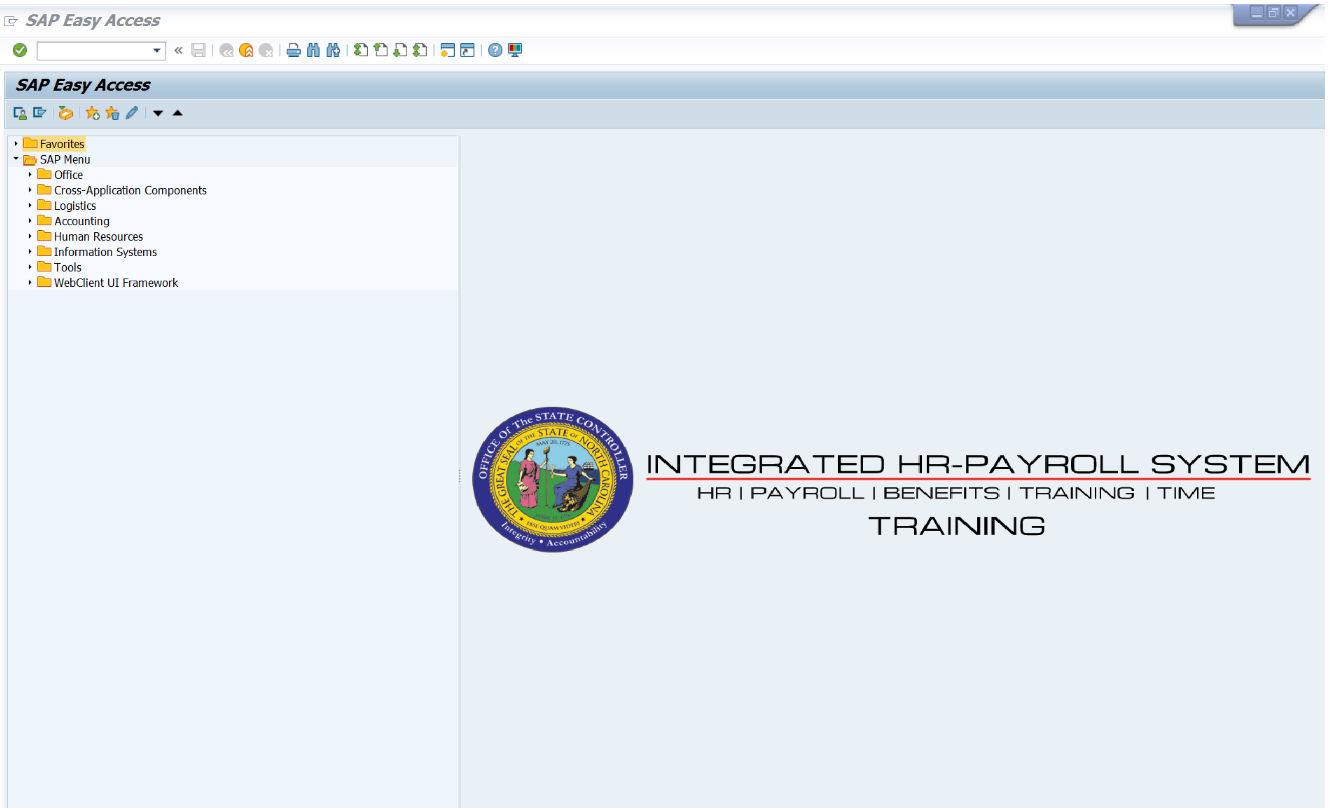
- The SAP Business Workplace is SAP's inbox and can be accessed by clicking on the **SAP Business Workplace** button, or by entering transaction code **SBWP** in the Command Field.
- The SAP Business Workplace inbox is where all workflow documents will be initiated/requested and where all workflow documents will arrive for approvers to review and respond.
- In the SAP Business Workplace, workflow documents are SAP messages that are created and read like any outside emailing system (MS Outlook, etc.).
- For more information on the SAP Business Workplace, including an overview of all Tree Functions (folders, organization of the workplace), see the Job Aid *Business Workplace Overview Tree Functions*.

Access Transaction:

Via Menu Path: Your menu path may contain this custom transaction code depending on your security roles.

Via Transaction Code: ZPAA076

Procedure

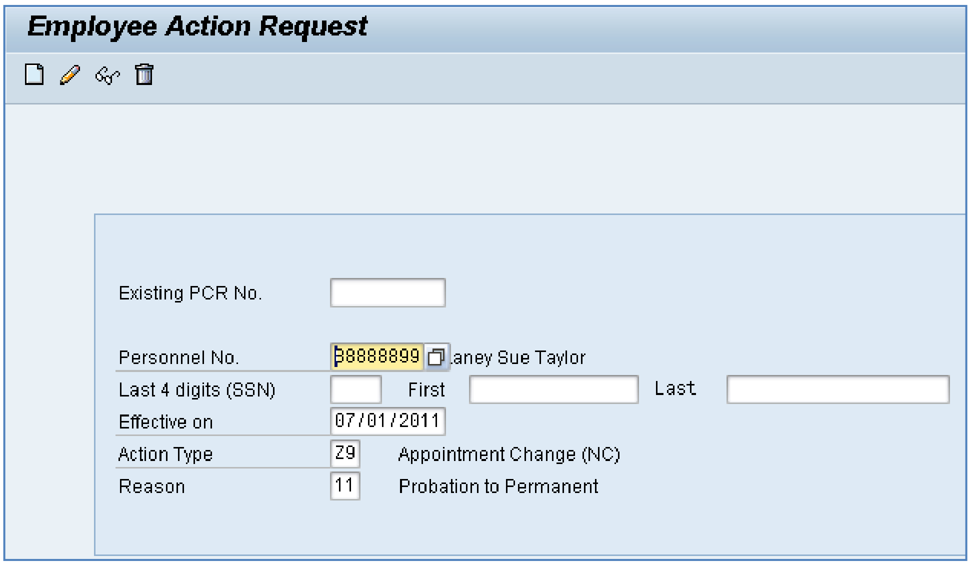


1. Update the following field:

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

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 **ZPAA076**. • 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 fields:

Field Name	Description	Values
Personnel No.	Unique employee identifier	Enter value in Personnel No. **Example**: 88888899
Effective on	The date on which the action will be effective	Enter value in Effective on. **Example**: 07/01/2011
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**: Z9
Reason	Reason for the action, such as Probation to Permanent	Enter value in Reason. **Example**: 11

4. Click the **Enter** button.

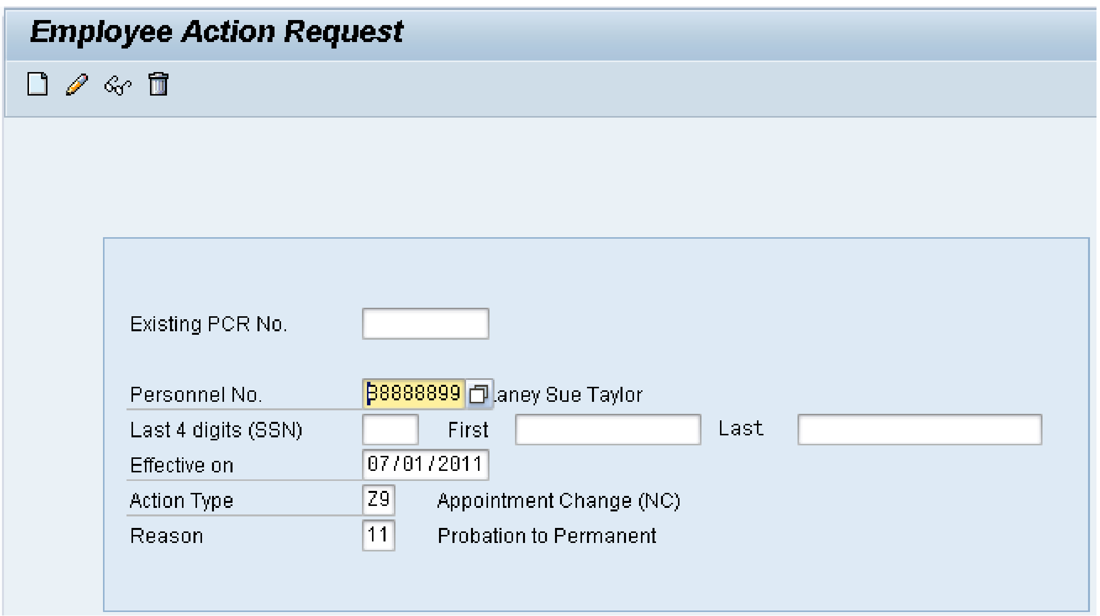
   Enter the Personnel Number of the individual on which the Appointment Change is be processed. Click **Enter** to retrieve the name of the individual and verify you have the correct Personnel Number.

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

   The system defaults the current date, but you may change the date to a day in the past or in the future. OSHR approval is required for Actions that exceed 60 days in the past.

   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

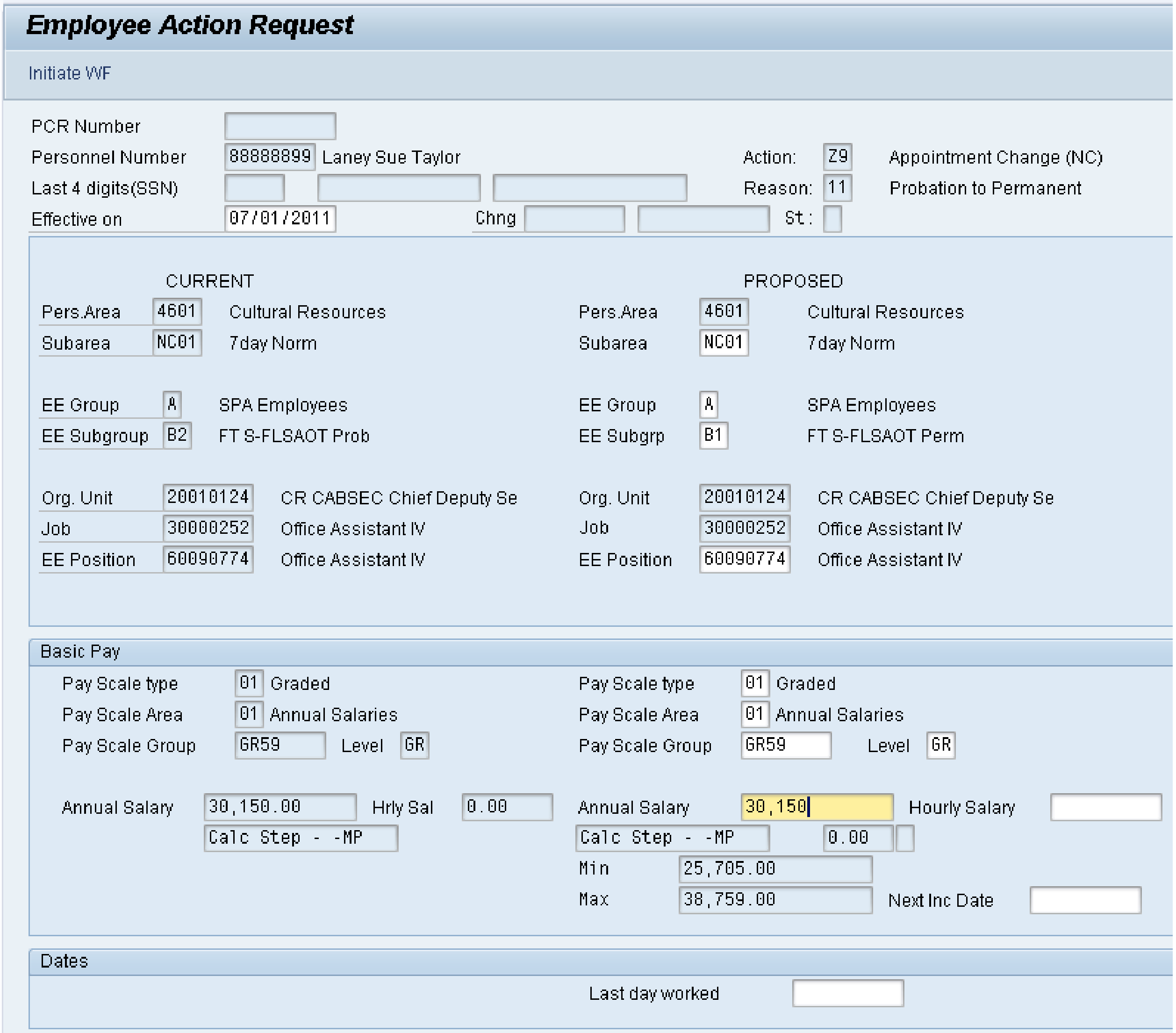


5. Click the **Create (F5)** button.

   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 88888899 Laney Sue Taylor
Action: Z9 Appointment Change (NC)
Last 4 digits(SSN)
Reason: 11 Probation to Permanent
Effective on 07/01/2011 Chng St:

CURRENT
Pers.Area 4601 Cultural Resources
Subarea NC01 7day Norm
EE Group A SPA Employees
EE Subgroup B2 FT S-FLSAOT Prob
Org. Unit 20010124 CR CABSEC Chief Deputy Se
Job 30000252 Office Assistant IV
EE Position 60090774 Office Assistant IV

PROPOSED
Pers.Area 4601 Cultural Resources
Subarea NC01 7day Norm
EE Group A SPA Employees
EE Subgrp B1 FT S-FLSAOT Perm
Org. Unit 20010124 CR CABSEC Chief Deputy Se
Job 30000252 Office Assistant IV
EE Position 60090774 Office Assistant IV

Basic Pay
Pay Scale type 01 Graded
Pay Scale Area 01 Annual Salaries
Pay Scale Group GR59 Level GR
Annual Salary 30,150.00 Hrly Sal 0.00
Calc Step - -MP

Pay Scale type 01 Graded
Pay Scale Area 01 Annual Salaries
Pay Scale Group GR59 Level GR
Annual Salary 30,150 Hourly Salary
Calc Step - -MP 0.00
Min 25,705.00
Max 38,759.00 Next Inc Date

Dates
Last day worked

6. Update the following fields:

Field Name	Description	Values
EE Subgrp	Employee's type of appointment	Enter value in EE Subgrp **Example:** B1
Annual Salary	Employee's annual basic pay	Enter value in Annual Salary. **Example**: 30150

7. Click the **Enter**  button.

   Enter the salary/hourly information in the Annual Salary or Hourly Salary field. Clicking Enter will allow you to validate the data.

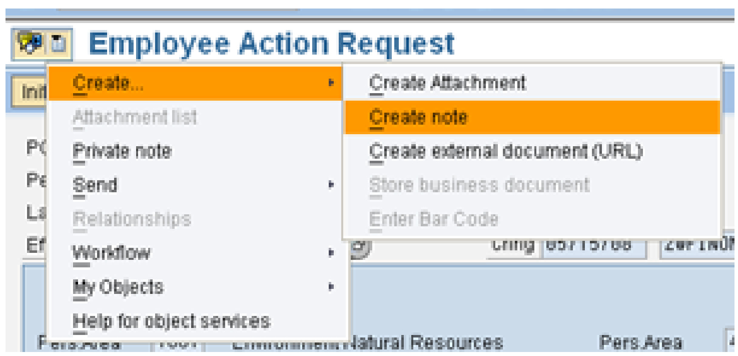
If the employee is an hourly employee, you will have to enter the **hourly** amount. The annual amount doesn't populate for hourly/salary employees. The system will calculate on IT0008 Basic Pay when created.

You can 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 **Enter**  button.

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

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



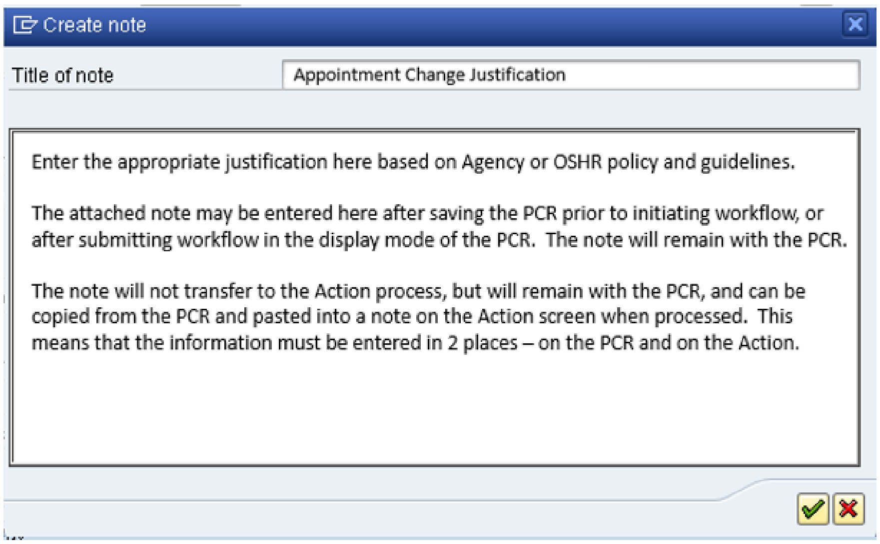
10. Click the **Services for Objects**  button.

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, it may be beneficial to create a note. If you want to add a document as an attachment, use the attachment area.

    This note and attachment area gets attached only to this specific PCR. 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.

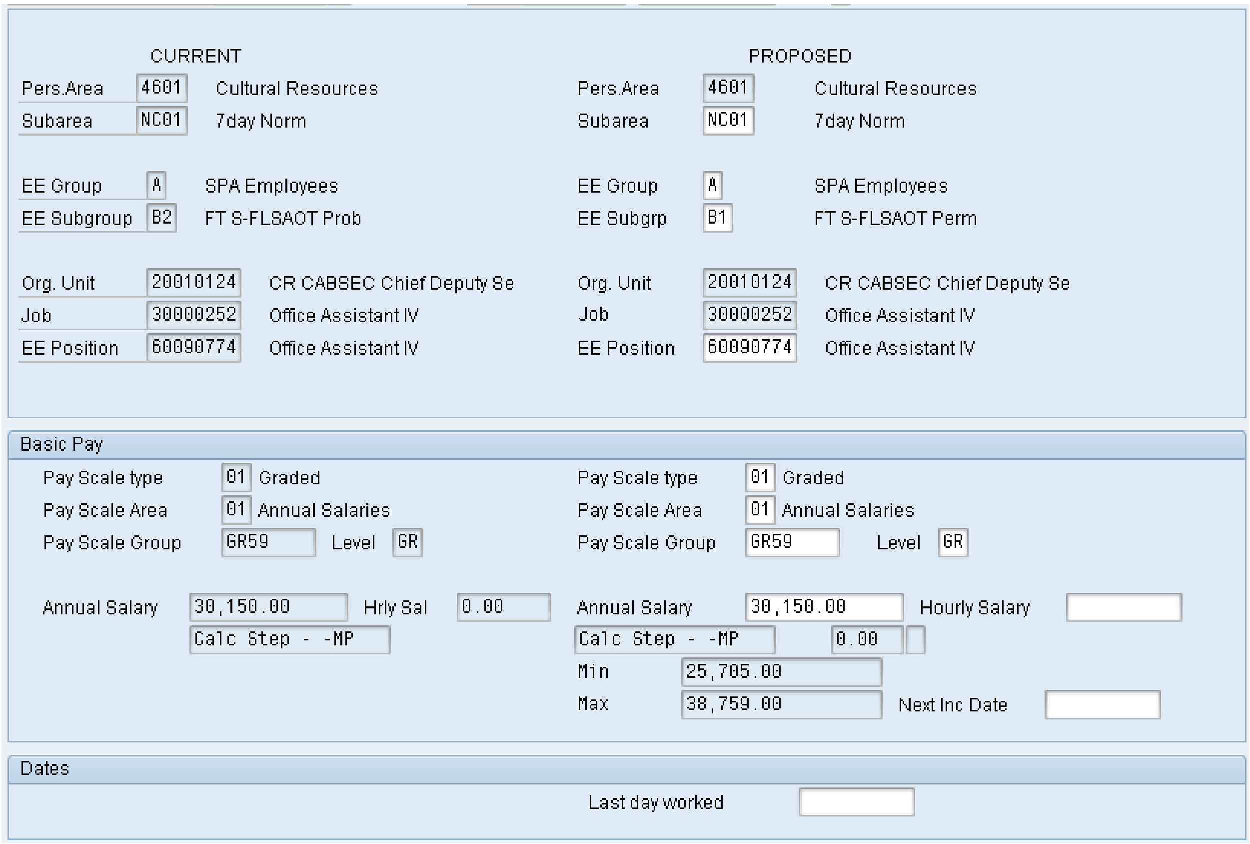
Notes entered during PA Workflow must follow OSHR's Action Notes Template:
https://www.osc.nc.gov/documents/action-notes-template



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**: Appointment Change Justification
Long text	An open text field	Enter value in long text. **Example**: appropriate information

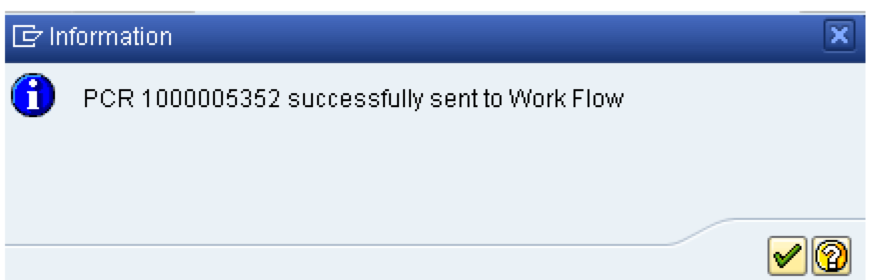
13. Click the **Enter**  button.



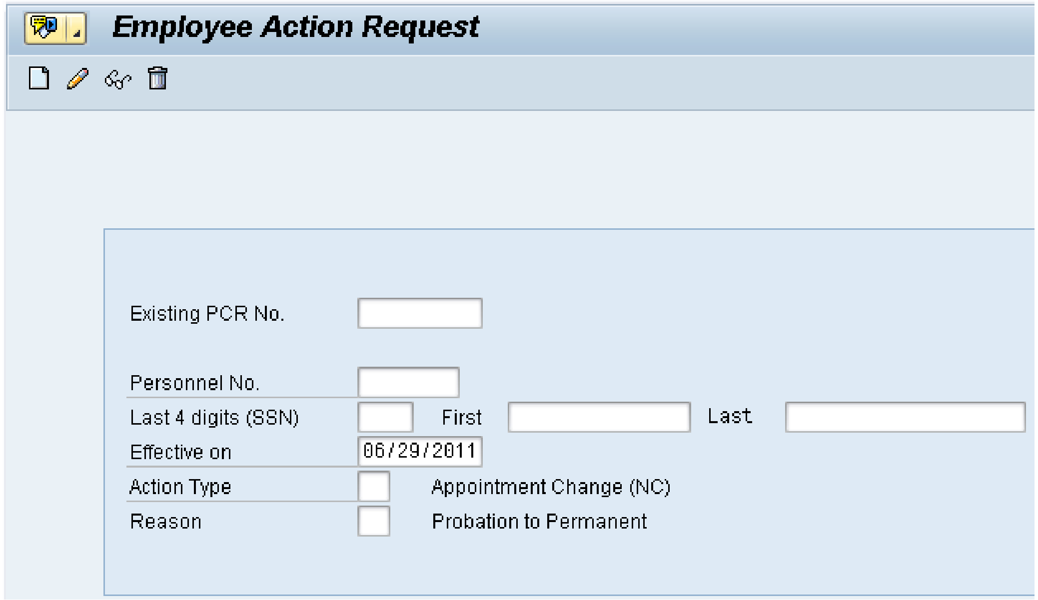
14. Click the **Initiate WF** 

button.

Select the Initiate Workflow button to send the Appointment Change 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).



15. Click the **Enter**  button.



16. Click the **Back (F3)**  button.
17. The Initiate Appointment Change Action is complete.

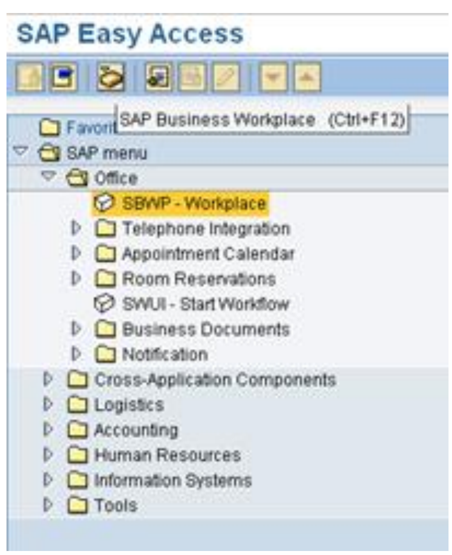
After Workflow Approvals have been received, proceed with the Complete Appointment Change Action process.

Instructions for Completing the Action

Access Transaction:

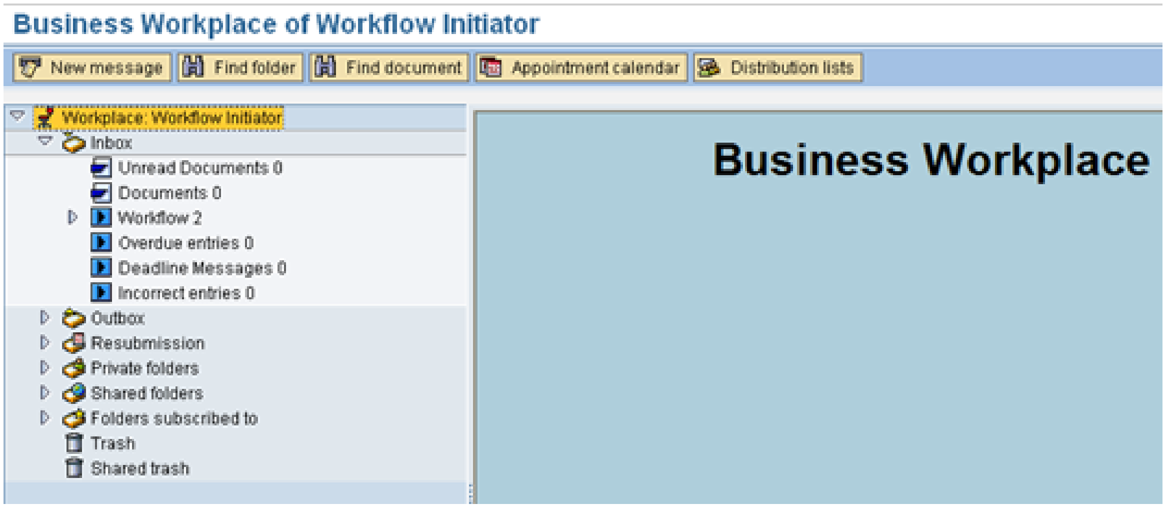
Via Menu Path: SAP menu ==> Office ==> SBWP – Workplace

Via Transaction Code: SBWP, PA400



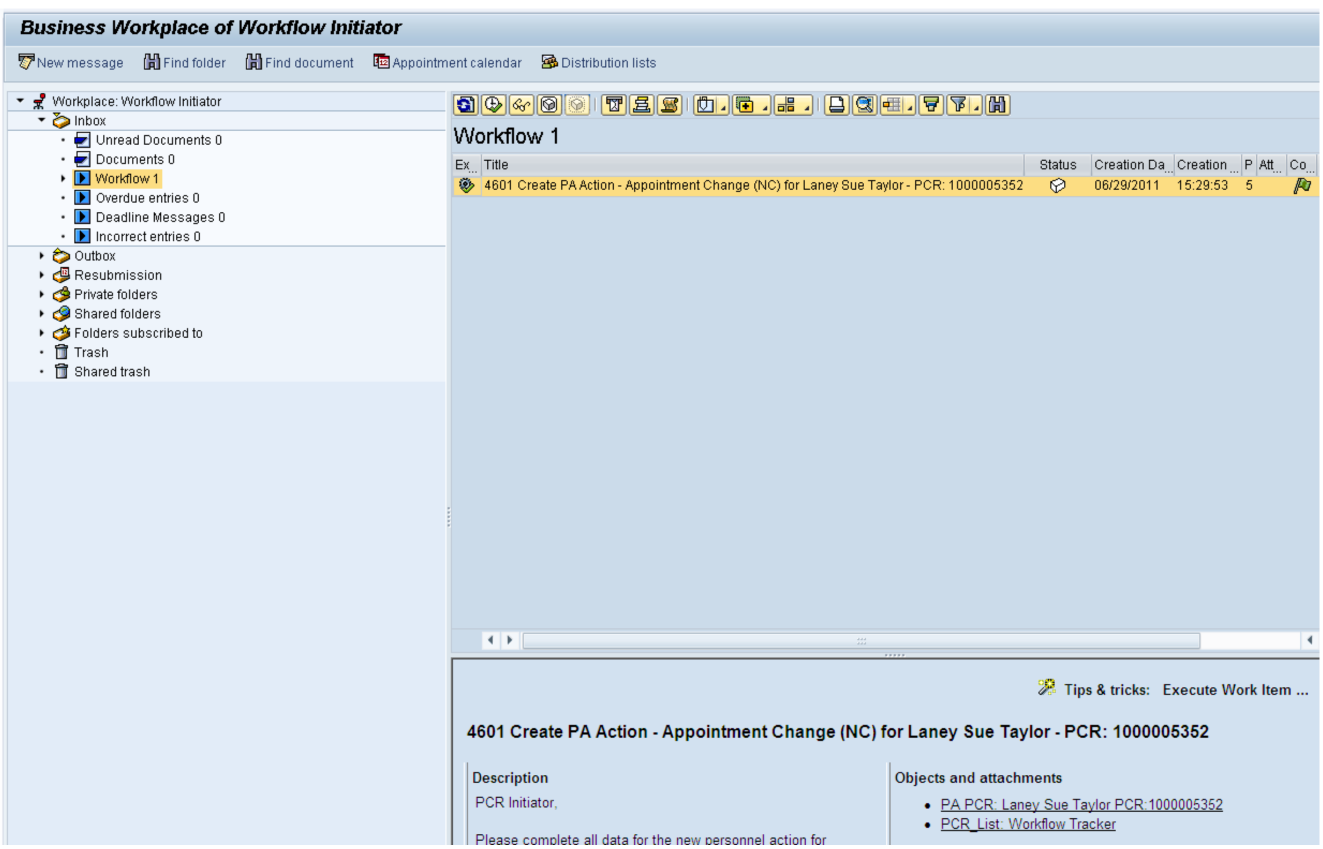
18. Click the SAP Business Workplace (Ctrl+F12)  button.

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



19. Select **Inbox >> Workflow**.

    You can process using step 20 or step 21.

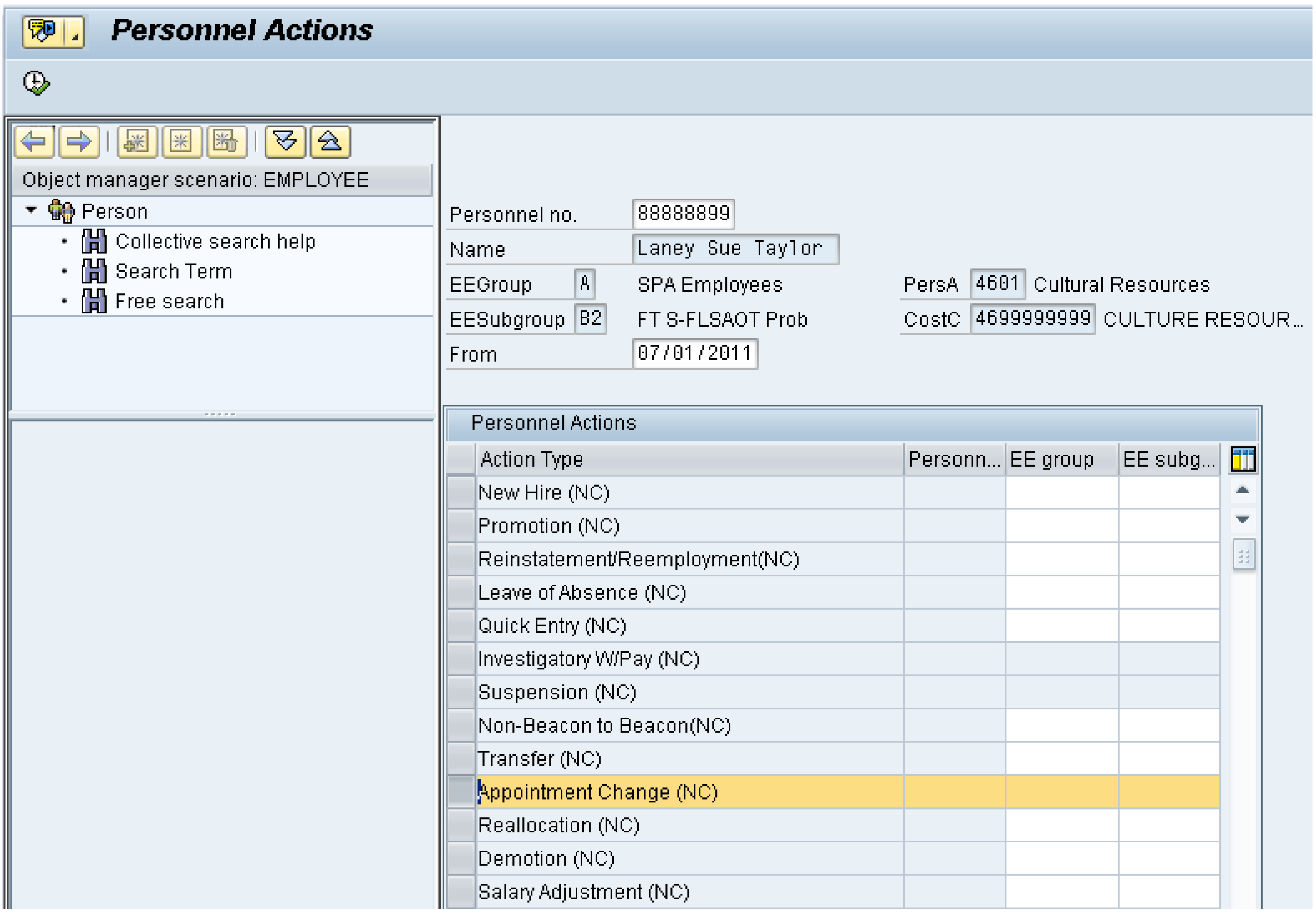


20. Select the **PCR** 

row. Double-click on row.

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

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



22. Update the following field:

Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From. **Example**: 07/01/2011

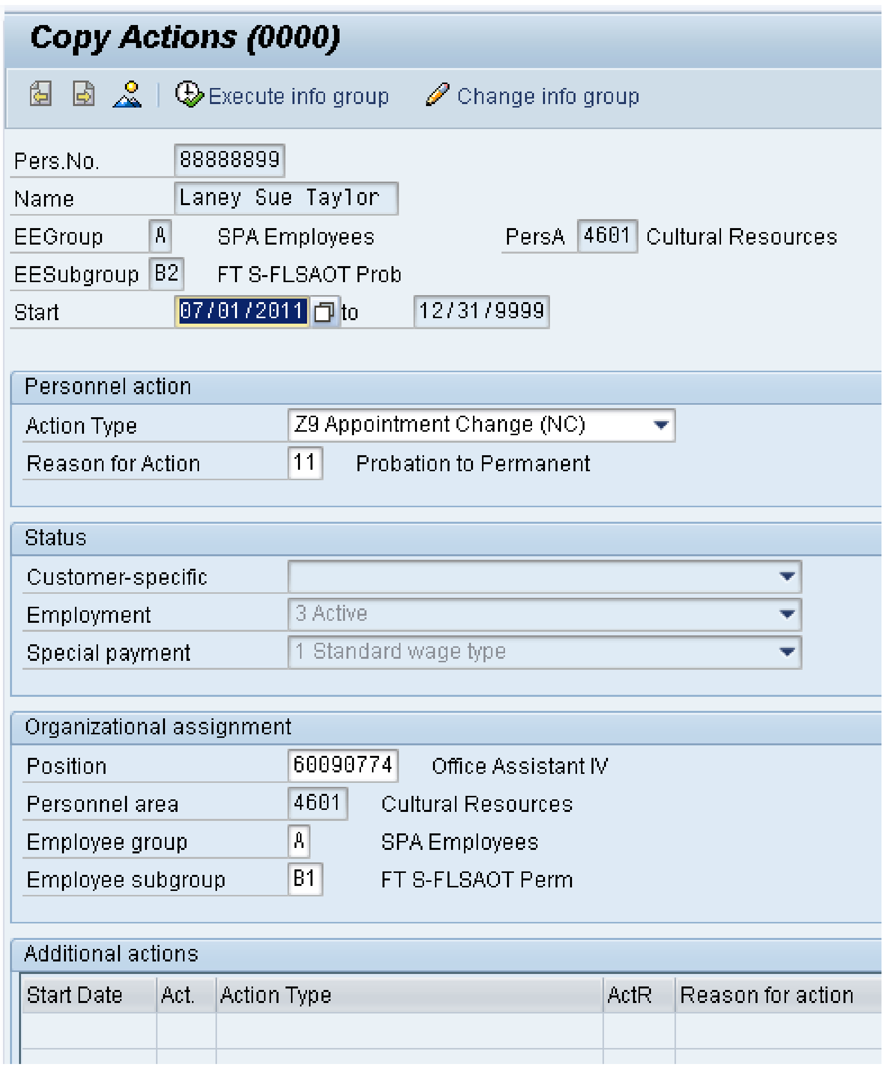
23. Highlight the **Appointment Change (NC)** action type.

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

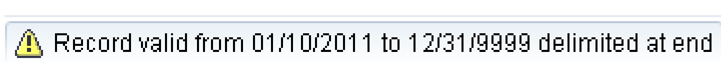
    Verify this is the individual for whom you need to process the Appointment Change action.

CRITICAL!

The effective date is the date the Appointment Change 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 Appointment Change is to be effective).



25. 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 get a warning message. Click Enter past this warning message.

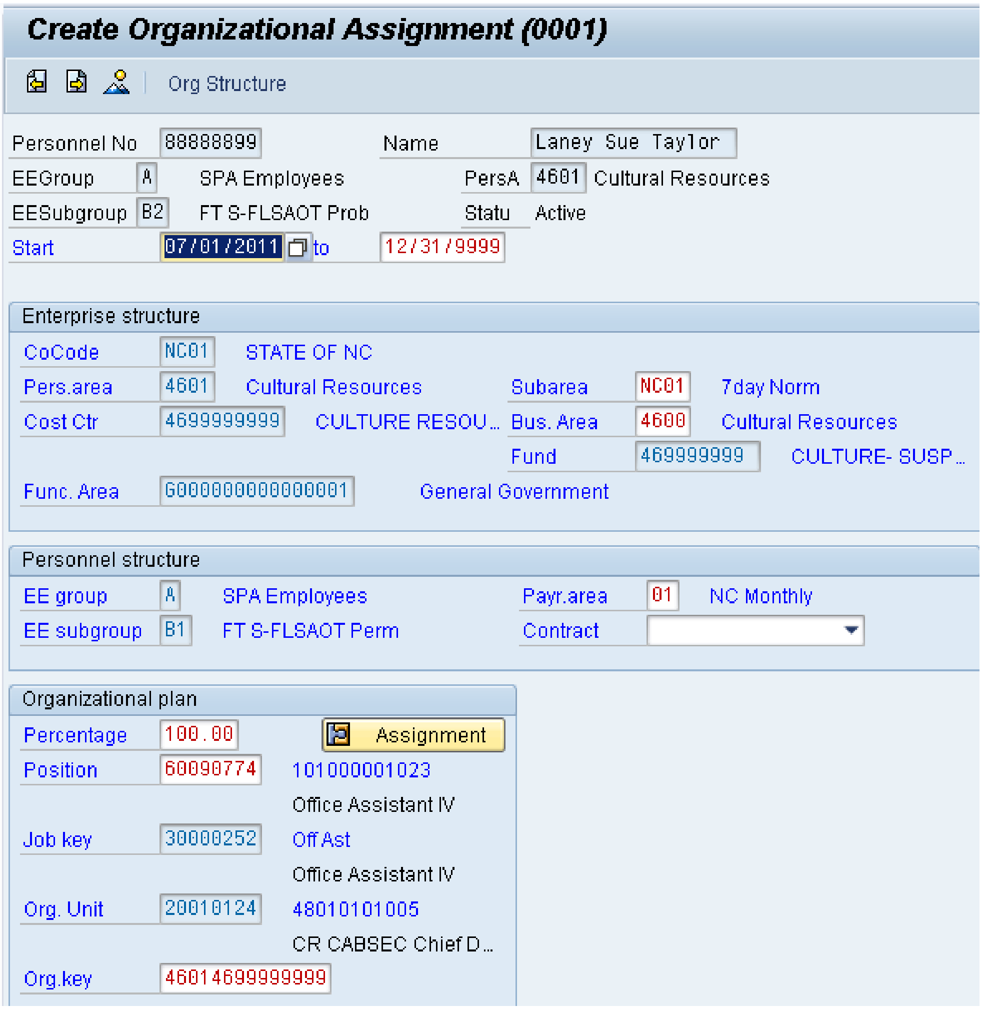
26. Click **Enter**  to continue.

27. Click **Edit, >> Maintain text** to add your comment based on agency or OSP Policy/Guidelines.

    Remember you can cut and paste from the PCR.

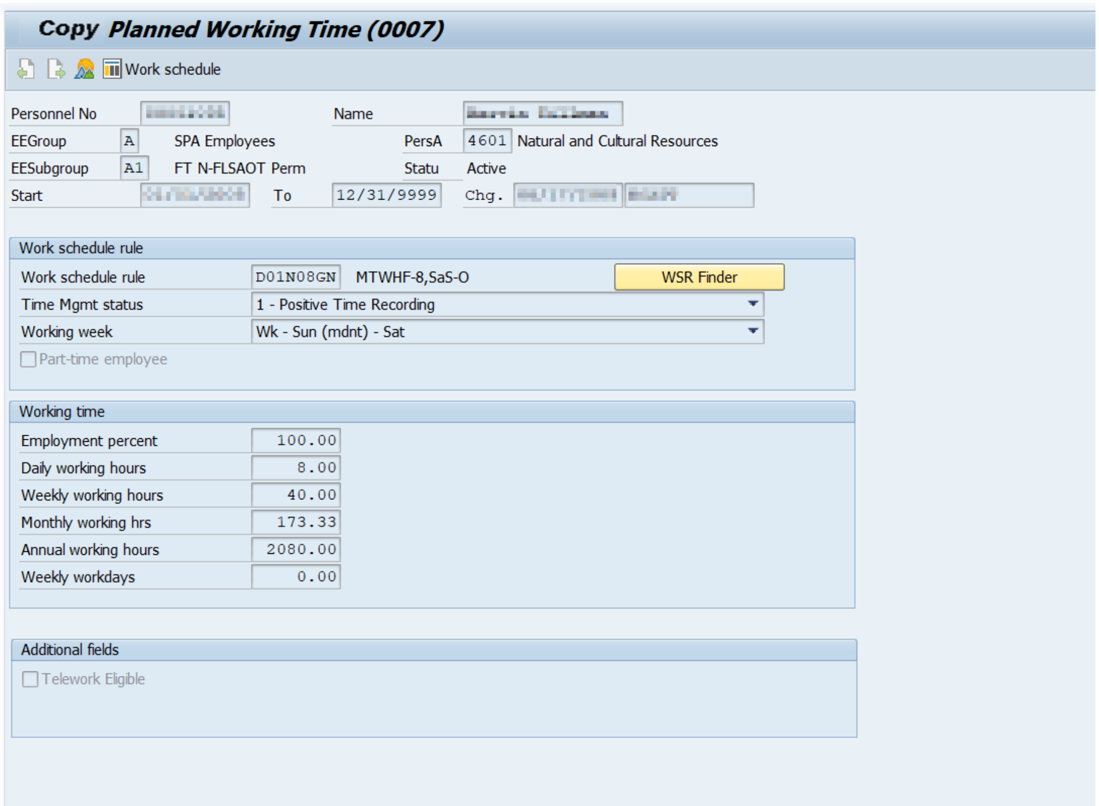
28. Click the **Enter**  button.

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



30. Click the **Enter** button.

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



32. Click the **Enter** button.

Adjust their work schedule as appropriate and save the data.

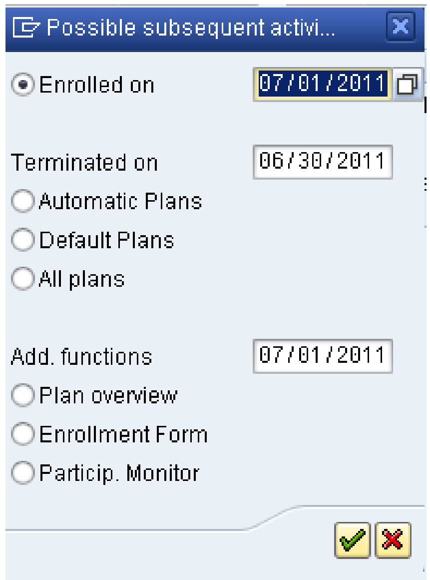
The Work Schedule Rule, Time Mgmt status and Working week defaults from the employee's enterprise structure. It is critical that you review for correctness (including the working week) and change the work schedule as appropriate for the employee if it is different from the one that defaults.

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 the Integrated HR-Payroll System team members.

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

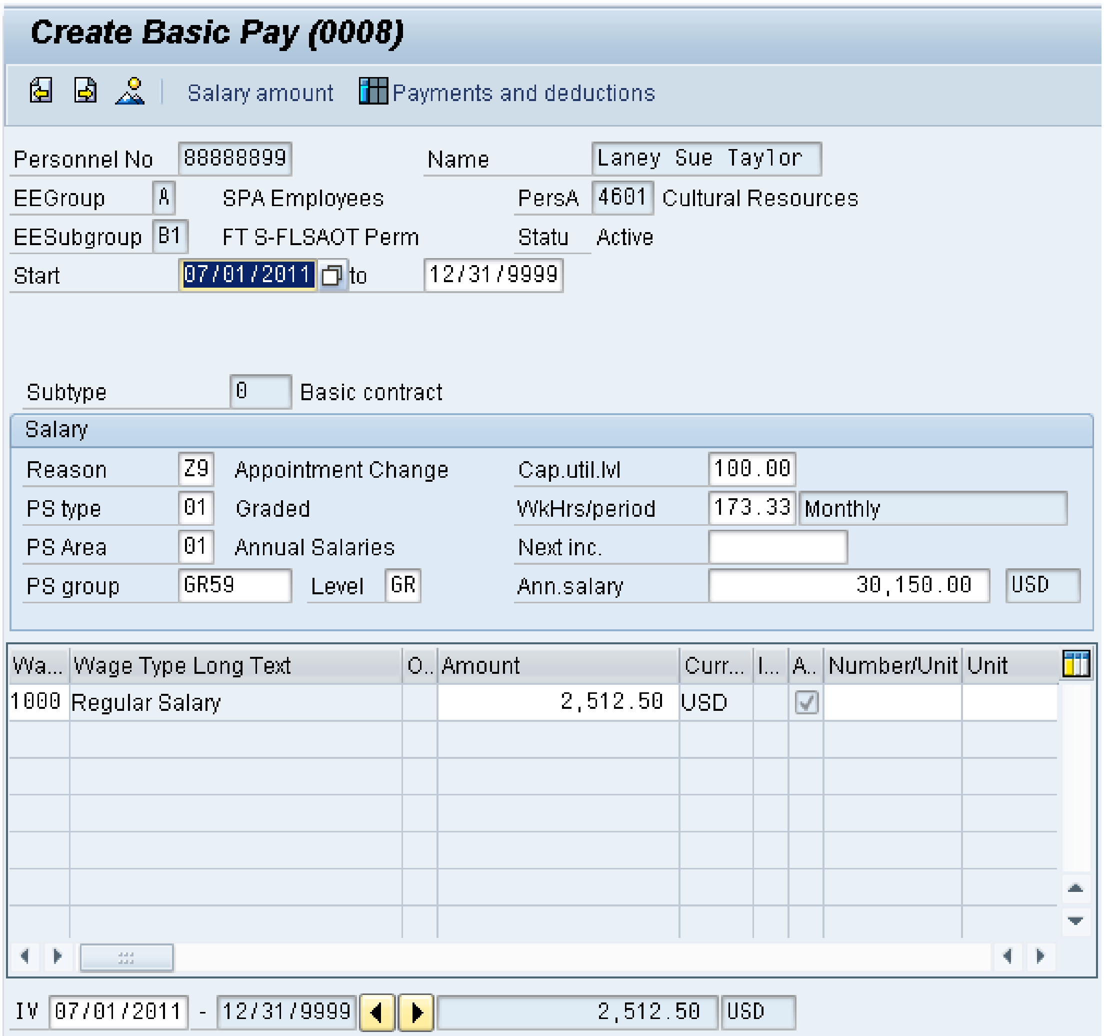
33. Click the **Save (Ctrl+S)** button.



Subsequent activities should be completed only 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).

34. 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**.



35. Update the following field:

Field Name	Description	Values
Reason	Reason for the action, such as Appointment Change	Enter value in Reason. **Example**: Z9

36. Click the **Enter**  button.

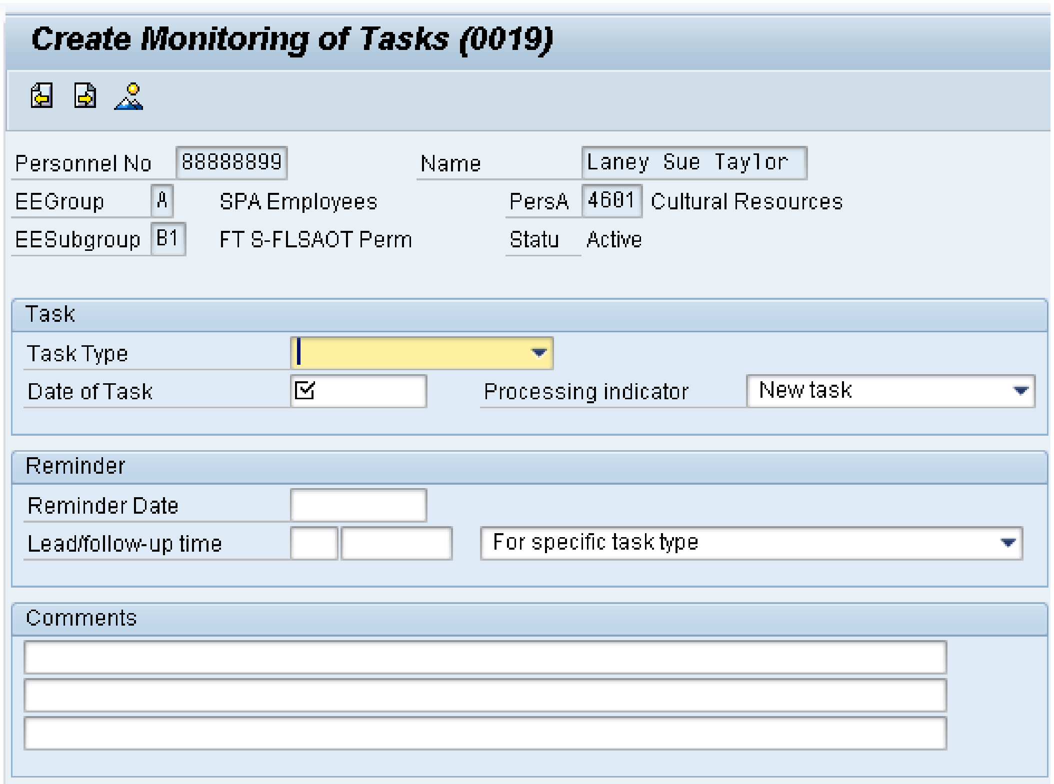
The pay scale values (pay scale type, pay scale area, pay scale group and level) have been designed to default based on the rules assigned to the employee's position. If the pay scale values do not default, please contact BEST Shared Services or your BEST HR Specialist.

Enter the Reason Appointment Change [Z9] 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).

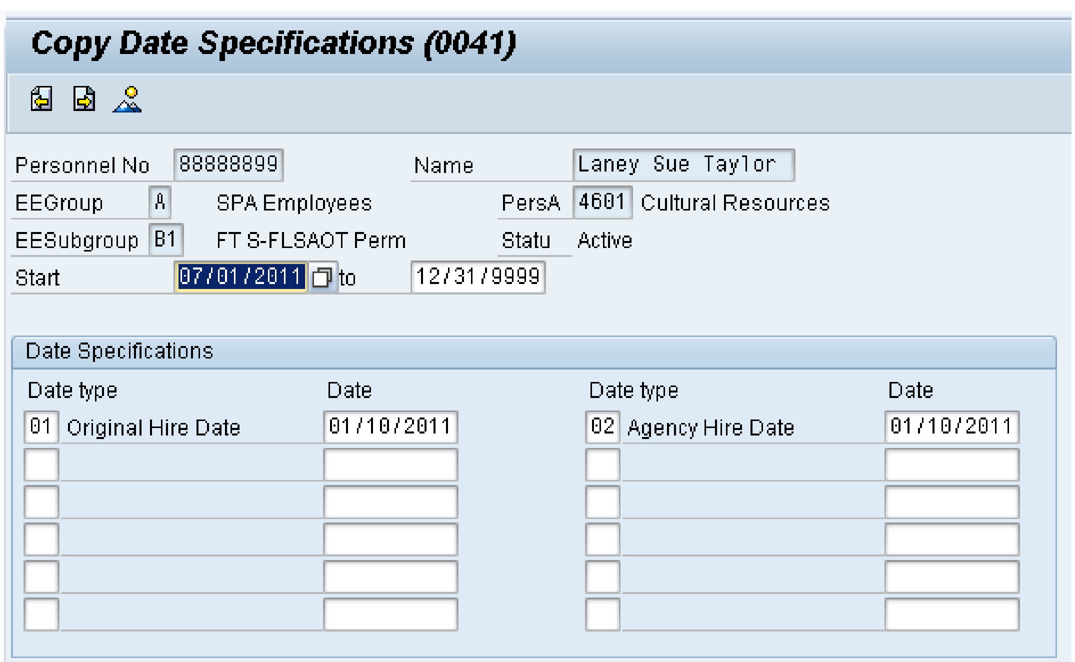
You will enter the hourly rate in the amount field manually; hit enter and the annual salary automatically calculates.

The Cap. Util. lvl always should be 100%. The Annual Salary should be the amount you are paying the employee. If at 40 hrs/wk EE was paid $80,000 and now EE is only working 20 hrs/wk, the salary entered will be $40,000. You are paying 100% of $40,000.

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



38. Click the **Next record (Shift+F7)** button.

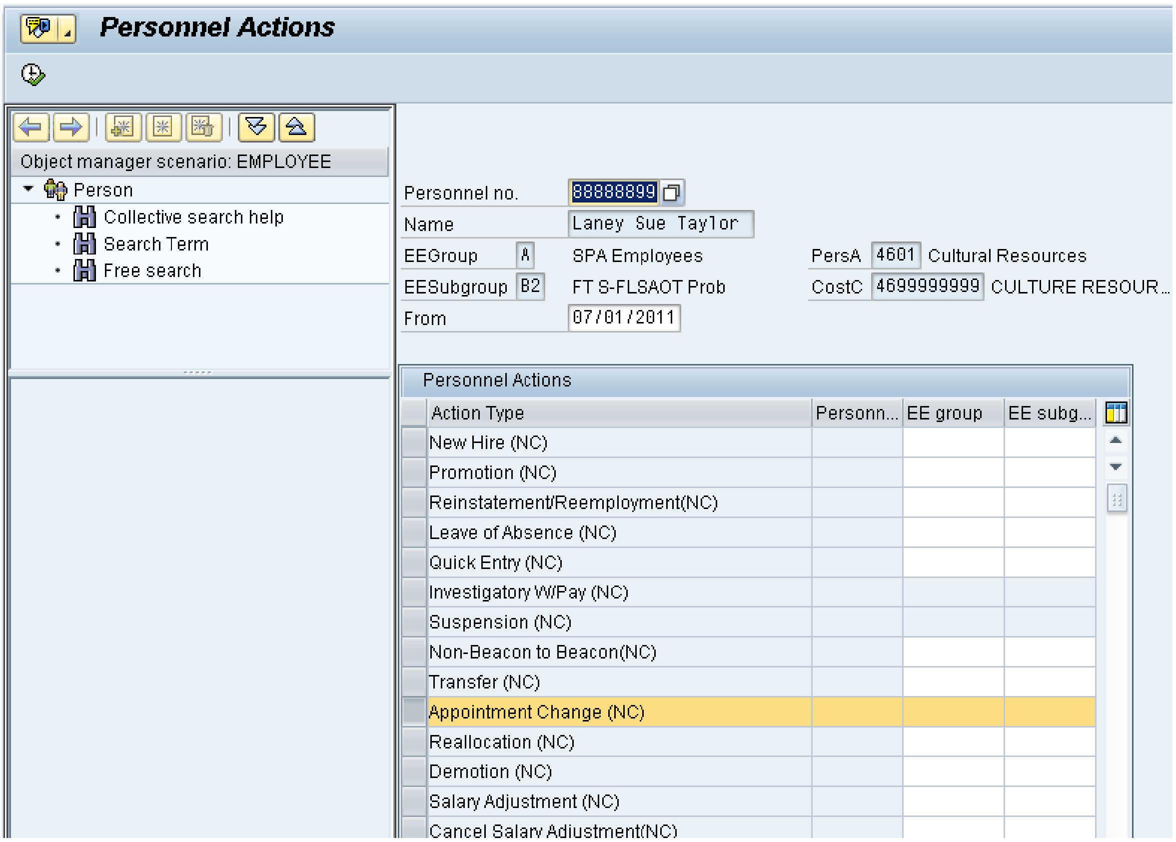


39. Click the **Enter** button.

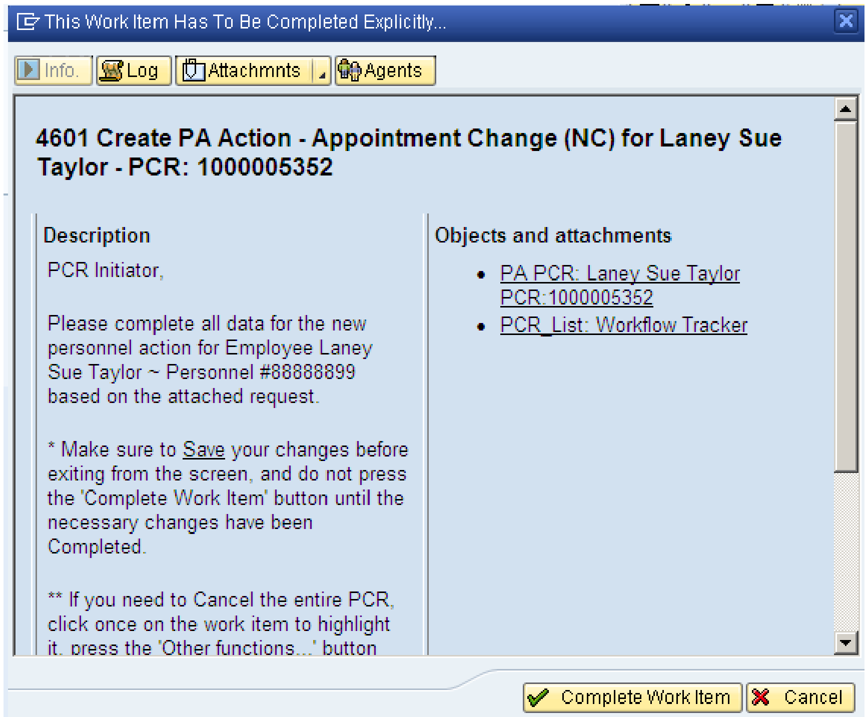
Information:

Review and make any changes to follow your Agency Procedure/Process guidelines.

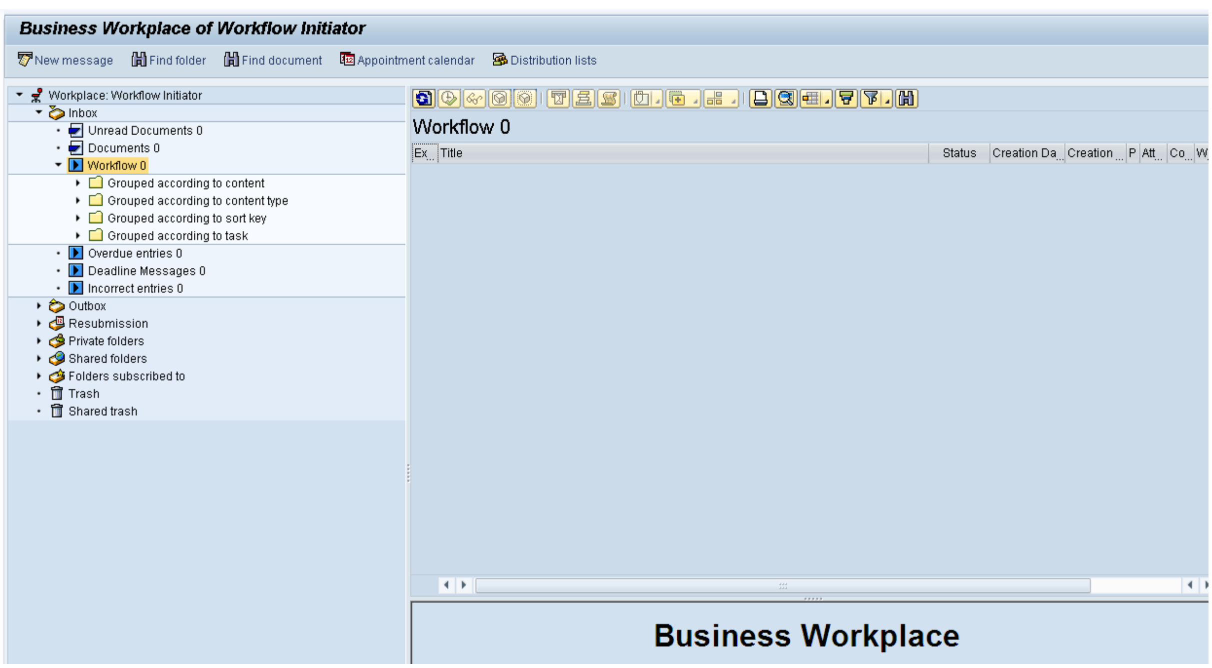
40. Click the **Save (Ctrl+S)** button.



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



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



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

The Appointment Change 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