The purpose of this Business Process Procedure is to explain how to process a new hire action – National Guard in the Integrated HR-Payroll System.

Trigger: There is a need to process a New Hire action for National Guard when notified of a new National Guardsman. **(This action is used by the Department of Public Safety only.)**

Business Process Procedure Overview:

A New Hire action needs to be initiated when a Supervisor/Manager notifies HR of the initial employment of an individual to a position. This New Hire action form will be completed and submitted via workflow and will be assigned a PCR number (personnel change request number). This PCR will proceed through the workflow approval levels as defined by the business process, and when complete, will come back to the Initiator's inbox for processing. The Initiator will open the approved New Hire PCR request, process the New Hire action, and when completed with all infotypes, click Complete on the PCR request.

As the initiator, you will use the Employee Request Form to create a New Hire Action workflow request for an employee. You will review the workflow item and use the standard workflow functions as appropriate to:

1.   View the workflow log
2.   View the workflow tracker
3.   View the workflow header
4.   View the priority classification

Once the PCR request has been approved, the initiator/requestor will process the New Hire action, which begins from the approved PCR item in the SAP inbox.

The New Hire action is used to generate a Personnel No and HR Master Data for:
- A new employee who has not worked for the State of North Carolina. In this situation the Reason for Action is 02 – National Guard

NOTE: Verify using B0157 Cross Agency Verification report to ensure the employee is not already in the system prior to starting the PCR action.

Tips and Tricks:

INITIATE

- Notes must be attached to the PCR to aid in the approval decisions by those in the approval workflow chain. These notes will not transfer to the Action but may be copied and pasted into new notes within the Action.
- We recommend, on the Employee Action Request, entering 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.

COMPLETE

- We recommend processing the employee on the first day of employment.
- Prior to starting the New Hire process, review the position to ensure there is no holder relationship.
- Personnel actions are date sensitive. Dates can be entered for an event in the future and will not take effect until that date, but will show in the system as soon as they are entered (for future-dated actions you will not be able to see the action unless you search within that date range – the default date range for searches is the current date).

Access Transaction:

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

Via Transaction Code: ZPAA076

Procedure
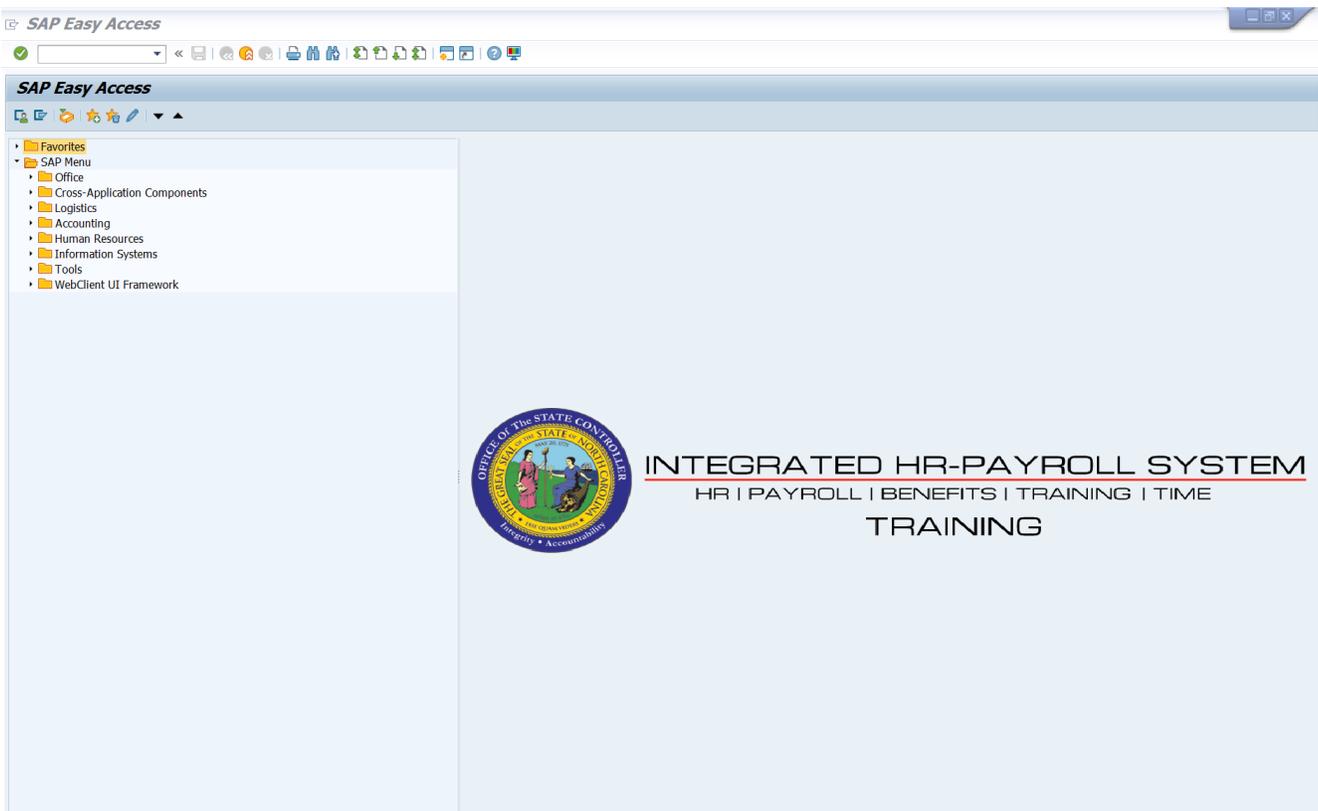
1. Update the following field:

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.

![info icon] **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
Last 4 digits (SSN)	The last 4 digits of the employee's social security number	Enter value in Last 4 digits (SSN). **Example**: 2356
First	The employee's first name	Enter value in First. **Example**: Timothy
Last	The individual's legal last name	Enter value in Last. **Example**: Mouse

Effective on	The date on which the action will be effective	Enter value in Effective on. **Example**: 07/01/2012
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**: Z0
Reason	Reason for the action, such as National Guard	Enter value in Reason. **Example**: 02

Information	As of 3/18/08, the last 5 digits of the social security number are no longer required. This has been changed to require only the last 4 digits of the social security number. This piece of an employee's social security number is required only for New Hire actions where the employee does not have a Personnel Number already.

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.

Once you have entered all data, click Enter to validate the data entered and display the associated text with the data choices made.

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

5. Update the following fields:

Field Name	Description	Values
EE Position	Position number assigned to the employee	Enter value in EE Position. **Example**: 60097844
Pay Scale Area	A pay scale area is a special area in which a collective agreement is valid. Hourly salary is used only for Temporary employees. You will need to change the Pay Scale Area to Hourly if using this field.	Enter value in Pay Scale Area. **Example:** 11
Level	Level assigned to the Position or Job	Enter value in Level. **Example:** GR
Hourly Salary	Employee's hourly salary	Enter value in Hourly Salary. **Example:** 1.00

Information	OSC recommends entering the EE Position number in first, so the Personnel Area, Personnel Subarea, Employee Group, Employee Subgroup and Pay information pre-populate based on the position number entered.

If you do not enter the position number first, the pre-population of data based on the position number may not work properly.

Once you have entered the EE Position number, click Enter to request SAP pre-fill fields on the screen.

6. Click the **Enter** button.

   NOTE: The Hourly Salary is not used to calculate pay. Agency Payroll enters the amount to be paid on IT0015, subtype 1630 as required.

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

8. Click the **Enter** button.

Information	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.
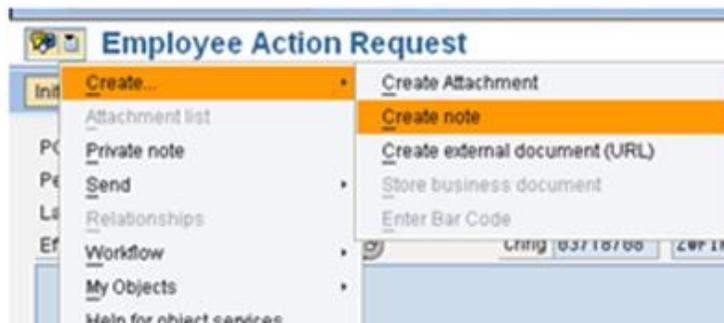
9. Click the **Services for Object** button.

10. 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
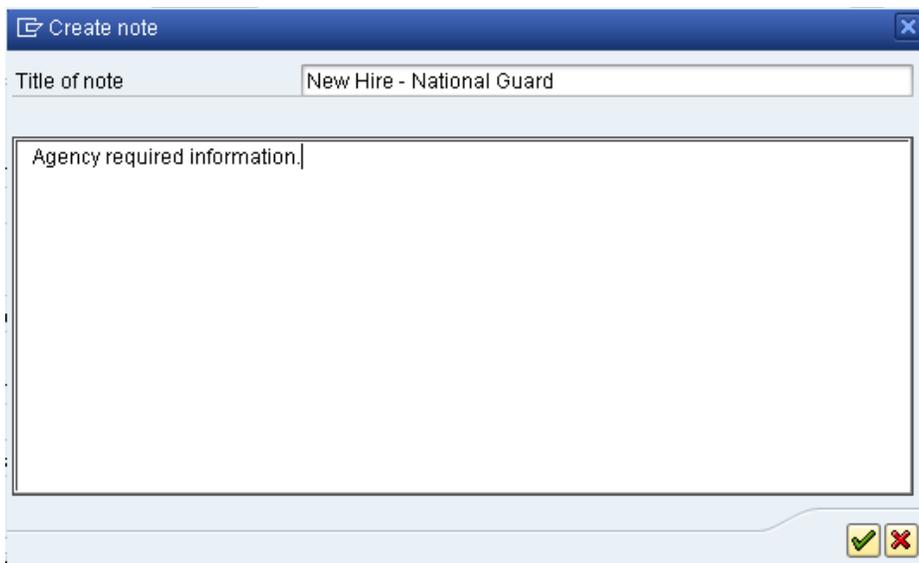
11. Update the following fields:

Field Name	Description	Values
Title of note	The short text to act as the title of the attachment	Enter value in Title of note. **Example**: New Hire-National Guard Justification
Long text	An open text field	Enter value in long text. **Example**: the appropriate note

> **Information**
>
> The attached note can be entered here after saving the PCR prior to initiating workflow, or after submitting workflow in the display mode of the PCR. The note will remain with the PCR. The note will not transfer to the Action process (such as a New Hire process), but will remain with the PCR, and can be copied from the PCR and pasted into a note on the Action when processed. This means that the information must be entered in two places - on the PCR and on the Action.

12. Click the **Enter** button.

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

14. Click the **Initiate WF** [Initiate WF] button.

Select the **Initiate Workflow** button to send the New Hire 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.
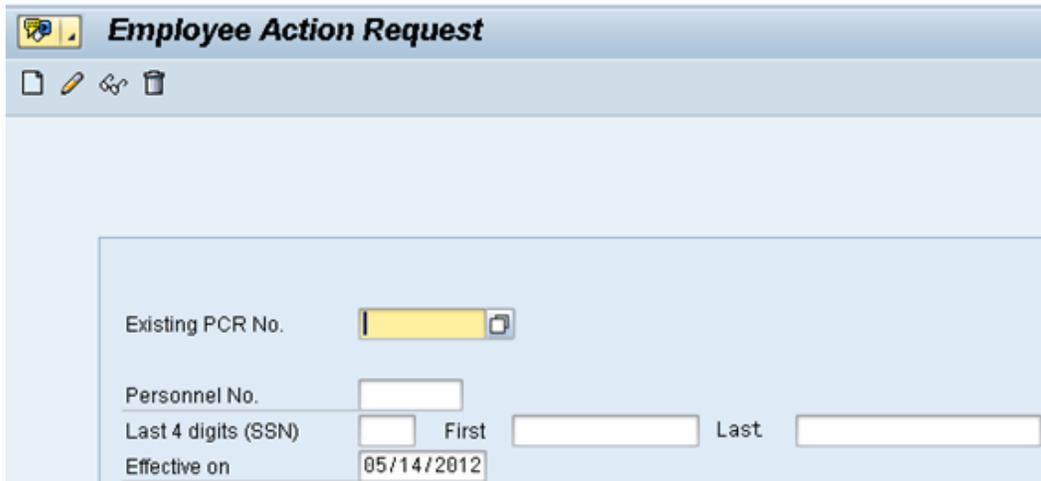
16. Click the **Back (F3)** 🔙 button.

17. The Initiate New Hire Action is complete.

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

Instructions for Completing the Action

Access Transaction:

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

Via Transaction Code: SBWP, PA40
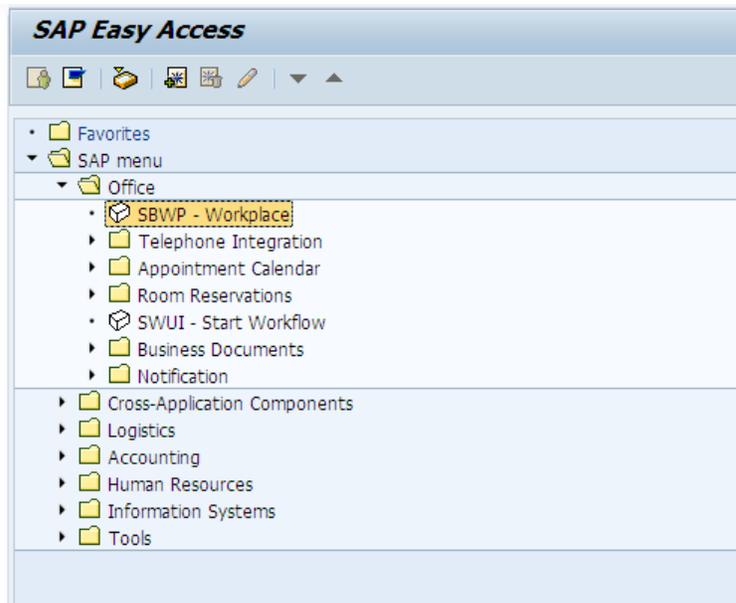
18. Click the **SAP Business Workplace (Ctrl+F12)** 📦 button.

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

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

    You can process using step 20 or step 21.

20. Select the **PCR** 1901 Create New Hire (NC) Action for Timothy Mouse - PCR: 1000258239 row. Double-click on row.

21. 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 the PCR is executed the New Hire action will be launched.

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22. Update the following fields:

Field Name	Description	Values
SSN	Social security number	Enter value in SSN. **Example**: 242922356
Date of Birth	The individual's date of birth	Enter value in Date of Birth. **Example**: 02/15/1961

23. Click the appropriate gender ☐ Male check box.

Information	The last 4 digits of the Social Security number must match the numbers entered when initiating the PCR. If they do not match, the system will notify you that you do not have a valid, approved PCR, and will not let you process the New Hire action.

The Start Date is the effective date of the New Hire action.

Add the Middle Name - the information entered on this screen will populate IT0002-Personal Data.

CRITICAL!	You **cannot** enter a dummy/temporary social security number. Once IT0002 is saved you must contact BEST HR to be maintained.

24. Click the **Execute (F8)** ⊕ button to retrieve the Personnel number from Orbit.
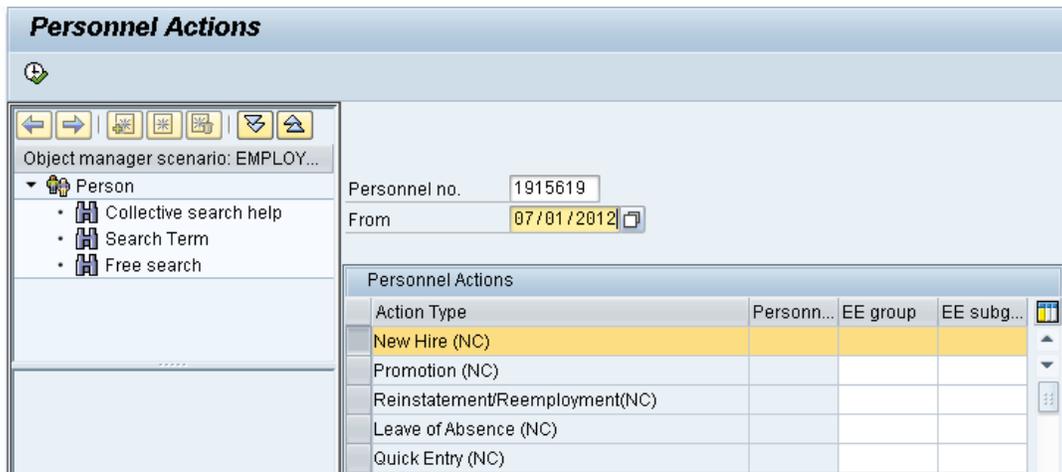
25. Update the following field:

Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From. **Example**: 07/01/2012

Notice that the Personnel Number has pre-populated here. This is the employee's Personnel Number, generated as a unique number from the Orbit retirement system.

The From date is the effective date of the New Hire action, or the date the employee "enters on duty."

ℹ️ **Information**	Throughout this action, you will be asked to review and Save each infotype, even if you are not entering any new data. The system may pre-populate some infotypes based on previous choices. Other infotypes will display dynamically based on which infotypes have been saved. If you simply click Next through an infotype, the record is not saved, and background processing may not work correctly.

26. Highlight the **New Hire (NC)** action type.

27. Click the **Execute (F8)** ⊕ button.

Create Actions (0000)

Pers.No. 1915619
Start 07/01/2012 to 12/31/9999

Personnel action

Action Type	Z0 New Hire (NC)
Reason for Action	02 National Guard
Reference Pers. Nos.	

Status

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

Organizational assignment

Position	60097844	Military Administrative O
Personnel area	1901	Public Safety
Employee group	0	Supplemental Staff
Employee subgroup	65	National Guard

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action

28. Click the **Enter** ✅ button.

The open fields will pre-populate from the approved PCR.

Best practice is to review all data and click Enter to allow the system to validate the data.

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

Infotype Text

Enter or paste appropriate comments.

30. Add your comments based on Agency or OSHR Policy/Guidelines.

Additional Resource
Refer to **OSC Training HELP page** for more information about copying PCR notes to the PA infotypes.

31. Select the appropriate **marital status** in the list box.

    Choose the appropriate marital status. If nothing is selected, "Single" will default.

32. Click the **Enter** ✅ button.

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

    NOTE: The start date will convert to the birth date when you save the infotype.

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

34. Click the **Enter** ✅ button.

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

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

35. Click the **Save (Ctrl+S)** 💾 button.

NOTE: You should not receive the above pop-up box. The vacancy infotype has been created as filled, so this position isn't submitted to NEOGOV. Also, when you separate a National Guard employee, click **No** on your Create Vacancy so the position continues to look filled, so it does not submit to NEOGOV.

Create Addresses (0006)

Foreign address

Personnel No	1915619	Name	Timothy Mouse	
EEGroup	0	Supplemental Staff	PersA 1901	Public Safety
EESubgroup	65	National Guard	Statu	Active
Start	07/01/2012	to	12/31/9999	

Address

Address type	1 Permanent residence
Care Of	
Address line 1	1636 Gold Star Drive
Address line 2	
City/county	Raleigh Wake
State/zip code	NC North Carolina 27607
Country Key	US USA
Telephone Number	919 733-2126

Communications

Type		Number		
Type		Number		
Type		Number		
Type		Number		

36. Update the following fields:

Field Name	Description	Values
Address line 1	The street number and address	Enter value in Address line 1. **Example**: 1636 Gold Star Dr
City/county	The city and county details for the address	Enter value in City/county. **Example**: Raleigh
City/county	The city and county details for the address	Enter value in City/county. **Example**: Wake
State/zip code	The state and zip code details for the address	Enter value in State/zip code. **Example**: NC
State/zip code	The state and zip code details for the address	Enter value in State/zip code. **Example**: 27607

Telephone Number Area Code	The individual's telephone number area code	Enter value in Telephone Number. **Example**: 919
Telephone Number	The individual's telephone number	Enter value in Telephone Number. **Example**: 733-2126

37. Click the **Enter** ✅ button.

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

   Enter address information as appropriate and available and click Save when complete.

   The various communication fields are optional.

   You can use the Tab key to tab through the fields.

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

39. Click the **Enter** ✅ button.

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

   If the employee resides in another state, that state should default from Infotype 0006 here.

NOTE: Always verify that the default information on the Create Residence Tax Area infotype is correct before saving.

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


```
Create Work Tax Area (0208)

Personnel No    1915619       Name         Timothy Mouse
EEGroup      0     Supplemental Staff    PersA  1901  Public Safety
EESubgroup  65    National Guard         Statu    Active
Start            07/01/2012  to      12/31/9999

Work Tax Data
Tax Area                     NC      State of North Carolina
Allocation                  100.00 %

Tax Authorities in Area
Tax Auth.  Tax Authority Name        Tax Level   Description
NC         North Carolina            B           State
```

41. Click the **Enter** button.

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

   NOTE: Always verify that the default information on the Create Work Tax Area infotype is correct before saving.

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

43. Click the **Enter** button.

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

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

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

Create Withholding Info W4/W5 US (0210)

Personnel No   10041414   Name   Matthew Lee McKinney

EEGroup   A   SPA Employees   PersA   4601   Natural and Cultural Resources

EESubgroup   A1   FT N-FLSAOT Perm   Statu   Active

Start   01/10/2020   to   12/31/9999

Status

Tax authority   FED   Federal   Tax level   A   Federal

Filing Status   03

☐ Use Higher Withholding Rates Schedule

Exemptions

Credits for dep.   [ ]   USD

Tax Exempt Ind.   Not exempt ▼   ☐ IRS mandates

☐ Foreign Earned Income

Withholding adjustments

Add.withholding   [ ]   USD   ☐ Non-resident tax calculation

Default formula   01   PCT MTHD-RES. U   Alternative formula   [ ]

Other income   [ ]   USD

Deductions   [ ]   USD

Additional Information

☐ Check here if the last name differs from that shown on the Social Security card

Overrides (from Infotype 0234)				
From date	End Date	Supplemental method	Tax override	Empl. Override Group

45. Click the **Enter** ✅ button.

Best practice is to enter any data as appropriate from the withholding form, review all data, and click Enter to allow the system to validate the data.

The default will be 03/Single or Married Filing Separately for the Filing Status field.

Employees with ESS (Employee Self-Service) access will be able to update their Withholding Information W4 via ESS.

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

Create Withholding Info W4/W5 US (0210)

Personnel No   10041414   Name   Matthew Lee McKinney

EEGroup   A   SPA Employees   PersA   4601 Natural and Cultural Resources

EESubgroup   A1   FT N-FLSAOT Perm   Statu   Active

Start   01/10/2020   to   12/31/9999

Status

Tax authority   NC   North Carolina   Tax level   B   State

Filing Status   01

Exemptions

Allowances   Exemption amount   USD

Additional allowance   Additional exemption amount   USD

Personal allowance

Dependent allowance

Tax exempt indicator   Not exempt   ☐ IRS mandates

Withholding adjustments

Add.withholding   USD   Add. percent

Default formula   01 WITHHOLDING FOR   Alternate formula

Additional Information

☐ Check here if the last name differs from that shown on the Social Security card

Overrides (from infotype 234)

From date	End Date	Supplemental method	Tax override	Certificat...	

47. Click the **Enter** ✅ button.

Best practice is to enter any data as appropriate from the withholding form, review all data, and click Enter to allow the system to validate the data.

The default will be 01/Single or Married Filing Separately for the Filing Status field.

48. Click the **Save (Ctrl+S)** 💾 button.

49. Update the following fields:

Field Name	Description	Values
Residence Status	Residence Status Code	Enter appropriate status: **Example**: Citizen

50. Click the **Enter** ![enter button] button.

Select the appropriate Residence status from the drop-down menu. The only required field is Residence status. The remaining fields are optional.

If a residence type other than Citizen is chosen, an additional screen will display containing IT0048 information to enter Residence Status details (such as permission number, expiration date, date of issue, etc.). In this example we have chosen Citizen.

When hiring someone that is a Non-Resident Alien, choose non-resident alien on IT0094. IT0048 will display with US01 or US02 as the choices. When you save IT0094 with the non-resident alien choice, the IT0048 with Subtype US01 will display. The dynamic action brings up IT0048 subtype US01 first, so, if you do not want that record, click the YELLOW arrow past that infotype and IT0048 subtype US02 will display.

51. Click the **Save (Ctrl+S)** ![save button] button.

Copy Planned Working Time (0007)

Personnel No		Name	
EEGroup	A	SPA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active
Start		To	12/31/9999	Chg.	

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

52. Update the following field:

Field Name	Description	Values
Weekly working hours	Total hours worked per week	Enter value in Weekly working hours. **Example**: 40

53. Click the **Enter** ✅ button.

   NOTE: The Time Management Status always will be "No time evaluation."

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

55. Update the following field:

Field Name	Description	Values
Reason	Reason for the action, such as New Hire	Enter value in Reason. **Example**: Z0
Amount	Hourly Rate	Enter value **Example**: 1.00

56. 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 the action (the Action type, or Z0 for New Hire), and the person's hourly rate in amount.

NOTE: When you enter the HOURLY rate, the system will calculate their salary. The National Guard will always be $1.00.

57. Click the **Save (Ctrl+S)** 💾 button.

Create Bank Details (0009)

Personnel No	1915619	Name	Timothy Mouse
EEGroup	0 Supplemental Staff	PersA	1901 Public Safety
EESubgroup	65 National Guard	Statu	Active
Start	07/01/2012 to	12/31/9999	

Bank details

Bank details type	0 Main bank
Payee	Timothy Mouse
House number/street	1636 Gold Star Drive
Postal Code/City	27607 Raleigh
Region	NC
Bank Country	US USA
Bank Key	
Bank Account	Bank control key
Payment method	C Payroll Check
Purpose	
Payment currency	USD United States Dollar

58. **Error! Reference source not found.** Click the **(Enter)** ✅ button.

Verify the data is set to **C**. National Guard employees are approved to be set to Check.

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

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

When you reach this front screen again, the system has processed all appropriate infotypes for the action you are creating. Now the action has been successfully processed, and you may complete the workflow.

This Work Item Has To Be Completed Explicitly...

Info. | Log | Attachmnts | Agents

1901 Create New Hire (NC) Action for Timothy Mouse - PCR: 1000258239

Description

Personnel Action Initiator,

Please create a New Hire (NC) PA Action using the attached request document for the personnel information.

** If you need to Cancel the entire PCR, click once on the work item to highlight it, press the 'Other functions...' button above and choose the "Reject execution" option. You will then be able to create a brand new PCR on this Employee.

Thank You.

Objects and attachments

- PA PCR: Timothy Mouse PCR:1000258239
- PCR_List: Workflow Tracker

✔ Complete Work Item   ✖ Cancel

61. Click the **Complete Work Item** [✔ Complete Work Item] button.

Decision Step in Workflow

Workflow   Create

1901 New Hire (NC) for Employee Timothy Mouse Status?

Choose one of the following alternatives

| Continue PA Action |
| PA Action Completed |
| Cancel and keep work item in inbox |

Description

Personnel Action Initiator,

Please choose one of the following choices for Employee Timothy Mouse ~ Personnel #01915619:

Continue PA Action - taken to transaction PA40 to complete the New Hire (NC) Employee's data.

PA Action Completed - New Hire (NC) data completed.

Cancel and Keep Work item in Inbox - the work item will remain in your inbox for later processing.

Thank You.

Objects and attachments

- PA PCR: Timothy Mouse PCR:1000258239
- PCR_List: Workflow Tracker

62. Click "PA Action Completed" **PA Action Completed** hyperlink.

Click the **Back (F3)** button.
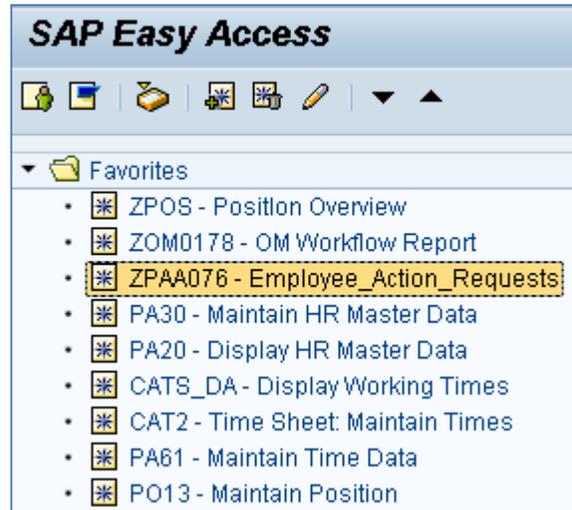
The New Hire Action is complete, but we recommend reviewing via PA20 all infotypes that have been processed.

Additional Resources

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

Change Record

Change Date: 2/5/2021 (B. Johnson)
Changes: Infotype 0007