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

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

Business Process Procedure Overview:

Promotion - movement to a position assigned a higher salary grade or movement between positions from one career-banded class to another with a higher journey market rate or movement from one position to another within the same banded class with a higher competency level.

- **01 - Promotion** - is movement to a position assigned a higher salary grade or movement between positions from one career-banded class to another with a higher journey market rate or movement from one position to another within the same banded class with a higher competency level.

- **02 - Promotion Inc-After Eff Date** – an employee receives remainder of increase with a current effective date.

- **03 - Acting Promotion** - is a temporary movement to a position assigned a higher salary grade or temporary movement between positions from one career-banded class to another with a higher journey market rate or temporary movement from one position to another within the same banded class with a higher competency level. Promotion Inc-After Eff Date – employee receives remainder of increase with a current effective date.

NOTE: If the Promotion action is for a limited time period, create an infotype 0019 Monitoring of Tasks record via transaction code PA30 to create a reminder to process the Cancel Salary Adjustment at the end date of the Promotion/Acting Promotion.
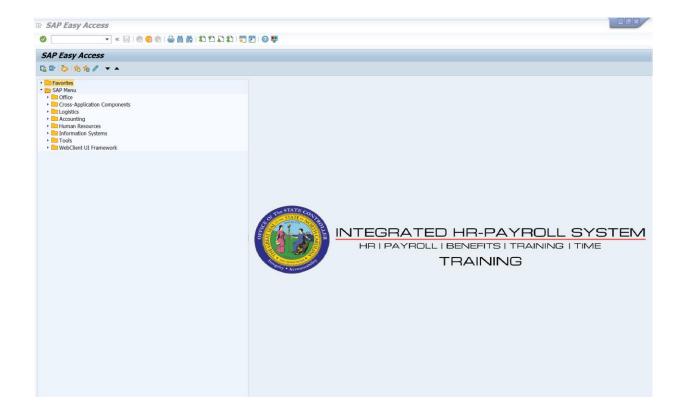
Tips and Tricks: Prior to initiating any workflow, ensure the data being used is valid and appropriate.

Access Transaction:

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

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** ![Enter button] button.

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

3. Update the following fields:

Field Name	Description	Values
Personnel No.	Unique employee identifier	Enter value in Personnel No. **Example**: 80000610
Effective on	The date on which the action will be effective	Enter value in Effective on. **Example**: 08/08/2011
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**: Z1
Reason	Reason for the action, such as Promotion	Enter value in Reason. **Example**: 01

4. Click the **Enter** button.

Enter the Personnel Number of the individual to be Promoted. Click **Enter** to retrieve the name of the individual and verify that the Personnel Number is correct.

NOTE: Only enter the SSN and name for New Hires.

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 overview section at the beginning of these instructions.

Click Enter and 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   80000610 Susan Castro   Action: Z1   Promotion (NC)

Last 4 digits(SSN)   Reason: 01   Promotion

Effective on   08/08/2011   Chng   St :

	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	A1	FT N-FLSAOT Perm	EE Subgrp	A1	FT N-FLSAOT Perm
Org. Unit	20010310	CR CDS A&H MOH Design Sec	Org. Unit	20010137	CR CDS A&H HIS RES Resear
Job	30001528	Museum Specialist	Job	30001497	Research Historian
EE Position	65001875	Lighting And Interactive Design…	EE Position	60083310	Research Historian

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	GR66	Level GR	Pay Scale Group	GR68	Level GR

Annual Salary 31,959.00   Hrly Sal 0.00   Annual Salary 35,154.90   Hourly Salary

Calc Step - 0   Calc Step - 0   10.00

                                              Min   35,337.00

                                              Max   56,330.00   Next Inc Date

Dates

                                              Last day worked

6. Update the following fields:

Field Name	Description	Values
EE Position	New position number assigned to the employee	Enter value in EE Position. **Example**: 60083310
Annual Salary	Employee's annual basic pay	Enter value in Annual Salary. **Example**: 35,154.90

7. Click the **Enter** ✅ button.

   Enter the **Position** number that the individual is being promoted into, and their new salary or hourly rate. Click **Enter** to validate the data.
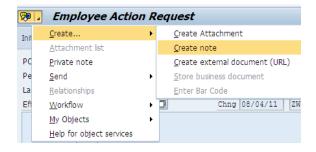
8. Click the **Save (Ctrl+S)** 💾 button.

   Click Save to save the data and receive a PCR number. The PCR has not been submitted to workflow yet.

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

   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.
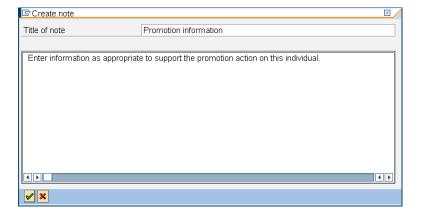

10. Click the **Services for Objects** button.

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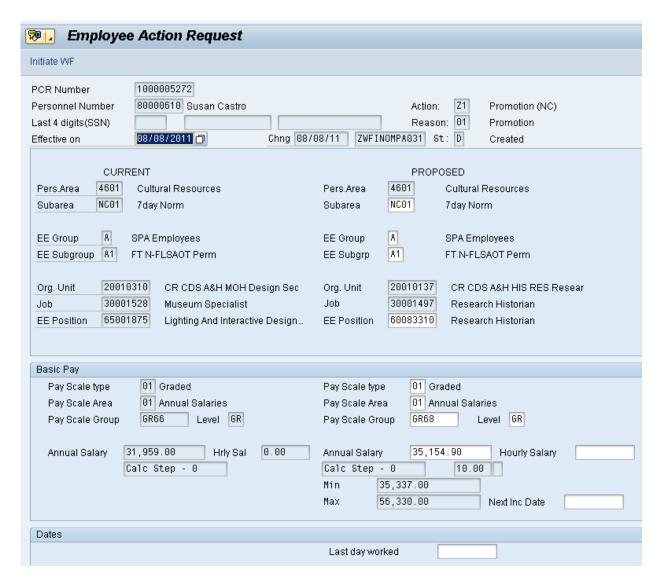   https://www.osc.nc.gov/documents/action-notes-template

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**: Promotion information
Long text	An open text field	Enter value in Long text. **Example**: appropriate information

13. Click the **Copy (Enter)** ✅ button.

14. Click the **Enter** ✅ button.

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

16. Click the **Initiate WF** Initiate WF button.

Select the **Initiate Workflow** button to send the Promotion 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 **Continue (Enter)** button.

18. Click the **Back (F3)** button.
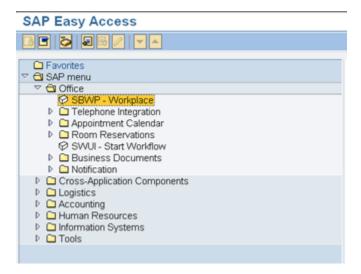
19. The Initiate Promotion Action is complete.

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

Instructions for Completing the Action

Access Transaction:

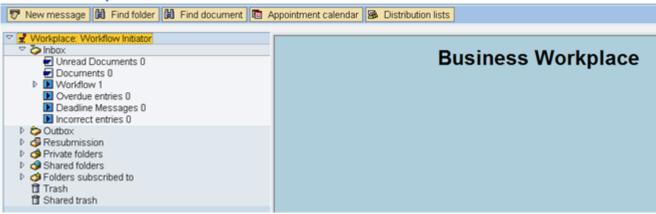**Via Menu Path:** SAP menu ==> Office ==> SBWP – Workplace

Via Transaction Code: SBWP

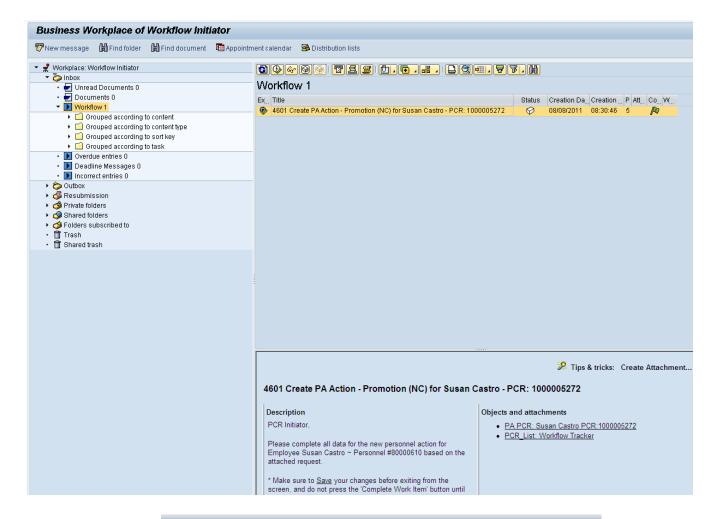20. Click the **SAP Business Workplace (Ctrl+F12)** button.

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

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

You can process using step 22 or step 23.

22. Select the **PCR** `4601 Create PA Action - Promotion (NC) for Susan Castro - PCR: 1000005272` row.

23. Double-click on row.

24. 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 Promotion action will be launched.

25. Update the following field:

Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From. Example: 08/08/2011

26. Highlight **Promotion (NC)** action type.

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

The effective date is the date the Promotion will go into effect.

28. Click the **Enter** ✅ button.

The system will provide a yellow warning message informing you the existing record will be delimited. Click Enter past this warning message.

Notice at the top of this screen the title includes the word "Copy." This action takes the original action and makes a copy of it, delimiting the previous record and saving the new record. The word "Create" in the title indicates that this infotype is being created on this person's record for the first time.

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

Infotype Text

Enter or paste appropriate comments.|

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

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

30. Click the **Enter** ✅ button.

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

Create Organizational Assignment (0001)

Org Structure

Personnel No	80000610	Name	Susan Castro
EEGroup	A	SPA Employees	PersA	4601	Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active
Start	08/08/2011 ▢ to	12/31/9999	

Enterprise structure

CoCode	NC01	STATE OF NC			
Pers.area	4601	Cultural Resources	Subarea	NC01	7day Norm
Cost Ctr	4699999999	CULTURE RESOU…	Bus. Area	4600	Cultural Resources
			Fund	469999999	CULTURE- SUSP …
Func. Area	6000000000000001	General Government			

Personnel structure

EE group	A	SPA Employees	Payr.area	01	NC Monthly
EE subgroup	A1	FT N-FLSAOT Perm	Contract		▼

Organizational plan

Percentage	100.00	🅱 Assignment
Position	60083310	201000002039
		Research Historian
Job key	30001497	Resrch His
		Research Historian
Org. Unit	20010137	48020102037
		CR CDS A&H HIS RE…
Org.key	46014699999999	

32. Click the **Enter** ✅ button.

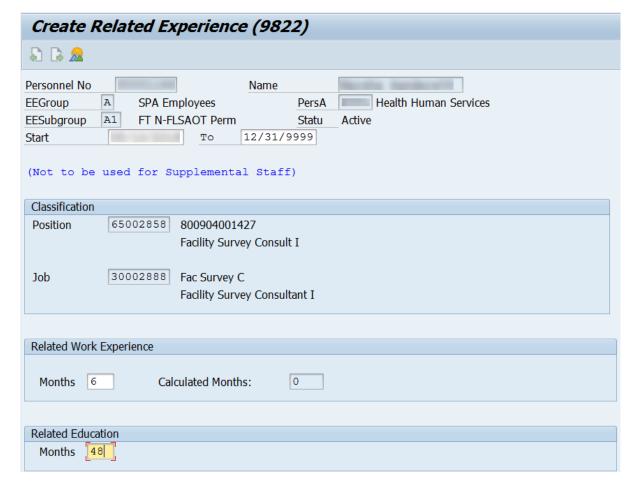   Enter the Contract if required. The Contract key identifies eligibility for Medicare, less than 5 yrs for STD, and the Rehire of Retiree statuses.

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

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

Create Related Experience (9822)

Personnel No		Name
EEGroup	A	SPA Employees	PersA		Health Human Services
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active
Start		To	12/31/9999

(Not to be used for Supplemental Staff)

Classification

Position	65002858	800904001427
		Facility Survey Consult I
Job	30002888	Fac Survey C
		Facility Survey Consultant I

Related Work Experience

Months 6   Calculated Months: 0

Related Education

Months 48

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.

    Agency representative will need to enter the following fields:

    o   Related Work Experience

    o   Related Education Months

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

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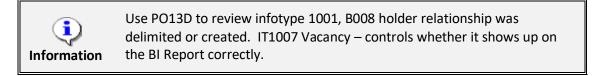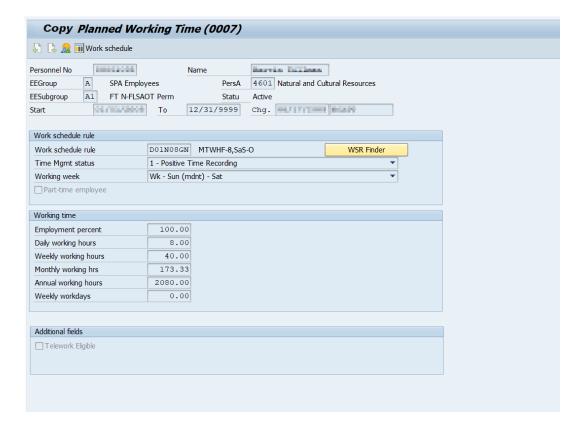

35. Click the **Yes** Yes button.

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

36. Click the **Yes** Yes button.

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

i	Use PO13D to review infotype 1001, B008 holder relationship was delimited or created. IT1007 Vacancy – controls whether it shows up on the BI Report correctly.
Information	

37. Click the **Enter** [✓] button.

Adjust their work schedule as appropriate and save the data.

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

If the individual is part-time, be sure to check the Part-time employee box and verify the working hours are less than 40.

The defaulted work schedule is based on information provided by the various agencies and Integrated HR-Payroll System team members.
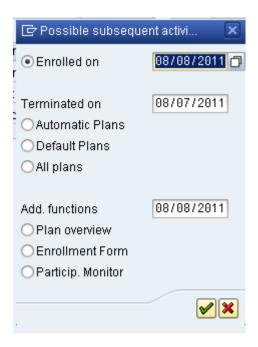
❌ **CRITICAL**!	Subject employees must be positive time. Employment percent always should be 100%.

38. 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)

39. Click the **Enter** [✓] button.

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

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

41. Click the **Cancel (F12)** ![X] button.

If you do not need to make changes to the benefits of the individual, click **Cancel** to bypass this infotype.

Create Basic Pay (0008)

Personnel No 80000610   Name   Susan Castro
EEGroup A   SPA Employees   PersA 4601 Cultural Resources
EESubgroup A1   FT N-FLSAOT Perm   Statu Active
Start 08/08/2011 to 12/31/9999

Subtype   0   Basic contract

Salary
Reason Z1   Cap.util.lvl 100.00
PS type 01   Graded   WkHrs/period 173.33 Monthly
PS Area 01   Annual Salaries   Next inc.
PS group GR68   Level GR   Ann.salary 35,154.90 USD

Wa...	Wage Type Long Text	O..	Amount	Curr...	I...	A.	Number/Unit	Unit
1000	Regular Salary		2,929.58	USD		☑		

IV 08/08/2011 - 12/31/9999   0.00 USD

42. Update the following field:

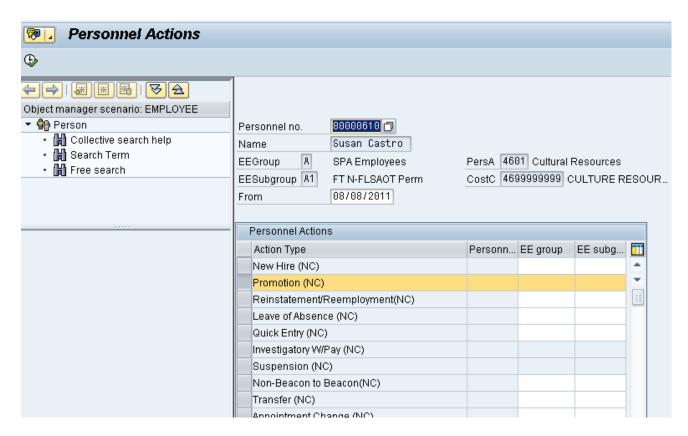| Field Name	Description	Values
Reason	Reason for the action such as Promotion	Enter value in Reason. **Example**: Z1

43. 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.
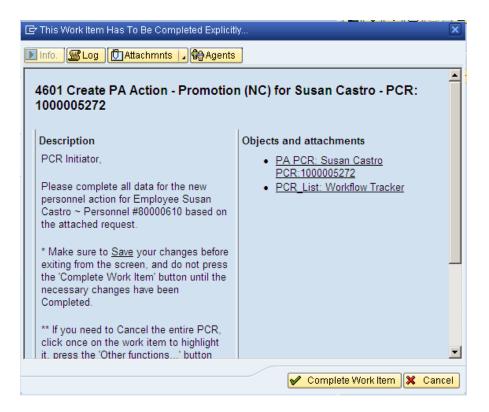
Enter the Reason Promotion (Z1), click Enter to validate the data. Notice the Annual Salary field has retrieved the amount submitted via workflow (or the hourly field is appropriated).

You will enter the hourly rate in the amount field manually; then press Enter and the annual salary automatically calculates.
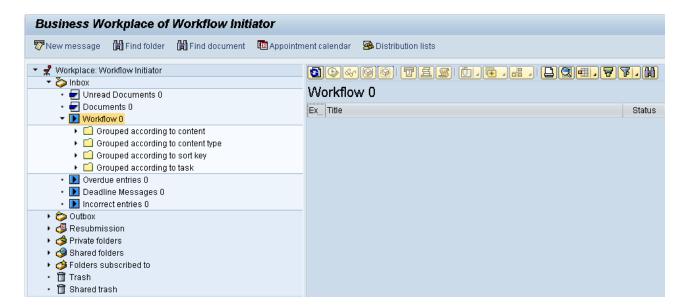
44. Click the **Save (Ctrl+S)** button.

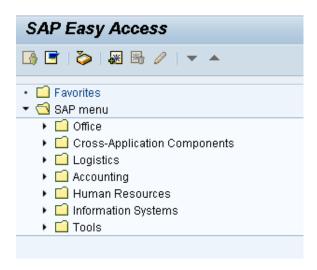45. Click the **Back (F3)** button.

46. 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 may complete the PCR in workflow.

Business Workplace of Workflow Initiator

🗑 New message   📇 Find folder   📇 Find document   📅 Appointment calendar   📇 Distribution lists

- ▼ 🛠 Workplace: Workflow Initiator
  - ▼ 📂 Inbox
    - • 📩 Unread Documents 0
    - • 📩 Documents 0
    - ▼ ▶ Workflow 0
      - ▶ 📁 Grouped according to content
      - ▶ 📁 Grouped according to content type
      - ▶ 📁 Grouped according to sort key
      - ▶ 📁 Grouped according to task
    - • ▶ Overdue entries 0
    - • ▶ Deadline Messages 0
    - • ▶ Incorrect entries 0
  - ▶ 📂 Outbox
  - ▶ 📂 Resubmission
  - ▶ 📂 Private folders
  - ▶ 📂 Shared folders
  - ▶ 📂 Folders subscribed to
  - • 🗑 Trash
  - • 🗑 Shared trash

Workflow 0

Ex	Title	Status

47. Click the **Back (F3)** 🔙 button.

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

SAP Easy Access

- • 📁 Favorites
- ▼ 📁 SAP menu
  - ▶ 📁 Office
  - ▶ 📁 Cross-Application Components
  - ▶ 📁 Logistics
  - ▶ 📁 Accounting
  - ▶ 📁 Human Resources
  - ▶ 📁 Information Systems
  - ▶ 📁 Tools

48. The Promotion 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