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

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

Business Process Procedure Overview:

Reallocation - is the assignment of a position to a different classification, documented through data collection and analysis according to customary professional procedure and approved by the agency HR or OSHR.

01 - Reallocation Up – employee graded or banded has been assigned to a higher-level job to recognize the higher-level duties.

02 - Reallocation Inc Partial - employee receives a portion of the increase.

03 - Reallocation Inc-After Eff Date Complete - employee receives remainder of increase.

05 - Reallocation Down – employee graded or banded has been assigned to a lower-level job to recognize the lower-level duties.

06 - Reallocation Horizontal – employee graded or banded has been assigned to the same level job to recognize the same level duties.

07 - Class/Pay Plan Change - Employee's SPA classification/pay is being assigned to a different SPA classification/pay system:
- Graded
- Career banded
- Pilot banded
- Skill Based Pay
- Flat rate

(No change in position number)

NOTES:
- Agency OM must process the change on the position prior to PA initiating the Reallocation Workflow on the employee.
- If funding is not available HR PA still initiates the Reallocation WF Action and chooses the appropriate reason for the employee. HR must then execute PA30 Maintain Master Data (IT0052-subtype 0200 Wage Maintenance) to reserve the balance.
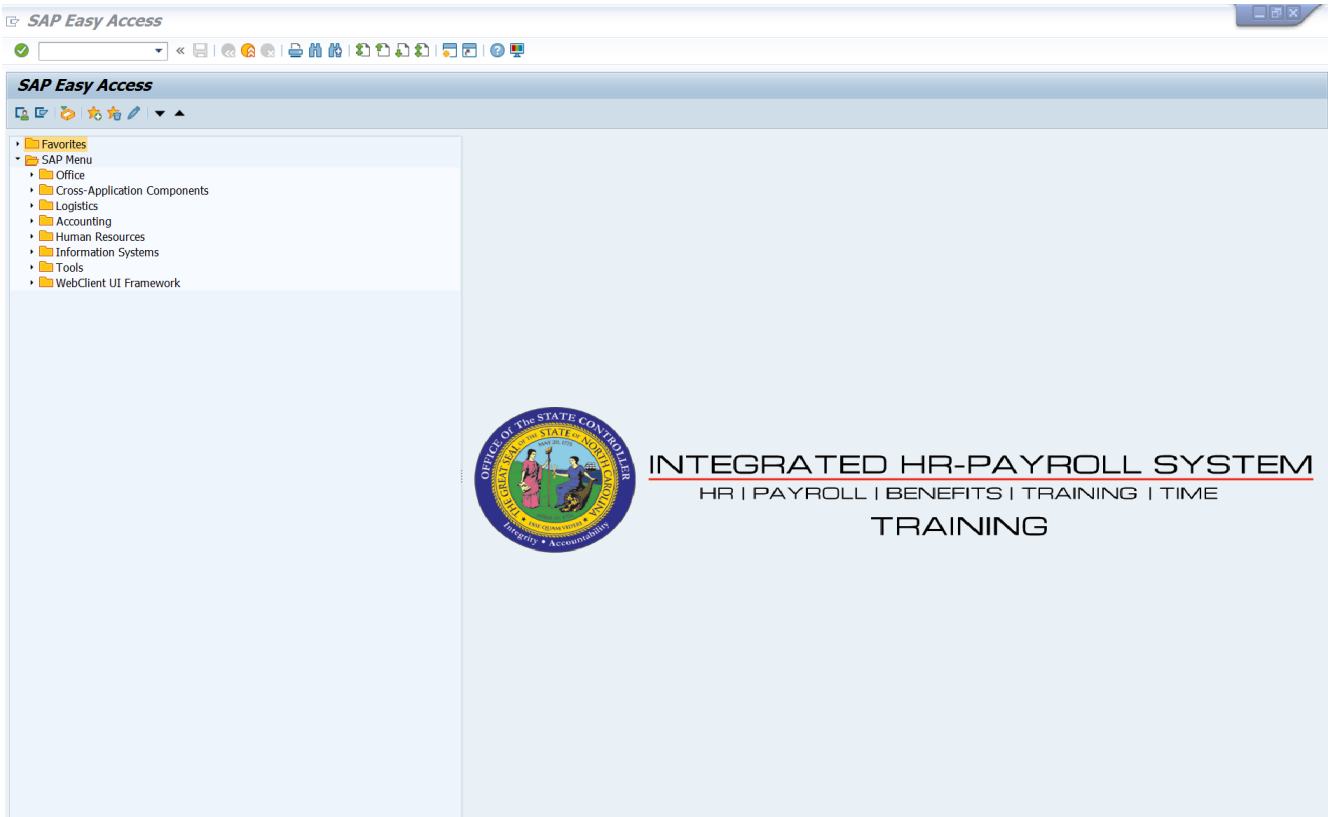
Tips and Tricks: Prior to initiating any workflow, ensure the data being used is valid and appropriate.

Access Transaction:

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

Via Transaction Code: ZPAA076; SWBP; PA40

Procedure

1. Update the following field:

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

2. Click the **Enter** button.

	You may want to enter this transaction code in your Favorites folder.
Information	• 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**: 80000119
Effective on	The date the action will be effective on.	Enter value in Effective on. **Example**: 09/01/2011
Action Type	An action is a grouping of activities to perform a specific task. The action will prompt you for the Infotypes required to complete the task.	Enter value in Action Type. **Example**: ZA
Reason	Reason for the action, such as Reallocation	Enter value in Reason. **Example**: 01

4. Click the **Enter** ✅ button.

   Enter the Personnel Number of the individual to receive the Reallocation. Click **Enter** to retrieve the name of the individual and verify you have the correct Personnel Number.

   NOTE: You enter the SSN and name for New Hires only.

   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.

   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.

   ### Employee Action Request

   🗋 ✏ ✂ 🗑

Existing PCR No.			
Personnel No.	80000119	Perry Teer	
Last 4 digits (SSN)		First	Last
Effective on	09/01/2011		
Action Type	ZA	Reallocation (NC)	
Reason	01	Reallocation Up	

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 80000119 Perry Teer   Action: `ZA` Reallocation (NC)

Last 4 digits(SSN) _____ _____ _____   Reason: `01` Reallocation Up

Effective on 09/01/2011   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	B1	FT S-FLSAOT Perm	EE Subgrp	B1	FT S-FLSAOT Perm
Org. Unit	20010136	CR CDS A&H Programs	Org. Unit	20010136	CR CDS A&H Programs
Job	30000248	Office Assistant V	Job	30000248	Office Assistant V
EE Position	60083305	Office Assistant V	EE Position	60083305	Office Assistant V

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	GR59 Level GR		Pay Scale Group	GR61 Level GR
Annual Salary	24,615.00 Hrly Sal 0.00		Annual Salary	27,077.00 Hourly Salary _____
	Calc Step - 0			Calc Step - 0 10.00
			Min	27,544.00
			Max	41,919.00 Next Inc Date _____

Dates

Last day worked _____

6. Update the following field:

Field Name	Description	Values
Annual Salary	Employee's annual basic pay	Enter value in Annual Salary. **Example**: 27077

7. Click the **Enter** ✅ button.

Enter the new **annual salary** or **hourly rate**. Click **Enter** to validate the data. If the employee is hourly, enter the hourly salary and leave the annual salary field blank.

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

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

9. Click the **(Enter)** [✔] button.

You 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 submitted the PCR to workflow already, you will not be able to change the details, nor save any new information, only display the existing details.
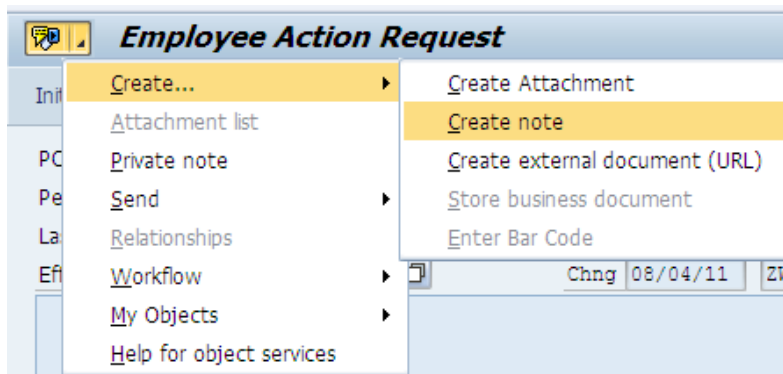
10. Click the **Services for Objects** [icon] button.

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

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

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

Employee Action Request

Initiate WF

PCR Number	1000005272					
Personnel Number	80000119 Perry Teer			Action:	ZA	Reallocation (NC)
Last 4 digits(SSN)				Reason:	01	Reallocation Up
Effective on	09/01/2011	Chng 08/31/11	ZWFINOMPA031	St:	D	Created

	CURRENT		PROPOSED
Pers.Area	4601 Cultural Resources	Pers.Area	4601 Cultural Resources
Subarea	NC01 7day Norm	Subarea	NC01 7day Norm
EE Group	A SPA Employees	EE Group	A SPA Employees
EE Subgroup	B1 FT S-FLSAOT Perm	EE Subgrp	B1 FT S-FLSAOT Perm
Org. Unit	20010136 CR CDS A&H Programs	Org. Unit	20010136 CR CDS A&H Programs
Job	30000248 Office Assistant V	Job	30000248 Office Assistant V
EE Position	60083305 Office Assistant V	EE Position	60083305 Office Assistant V

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	GR59 Level GR	Pay Scale Group	GR61 Level GR
Annual Salary	24,615.00 Hrly Sal 0.00	Annual Salary	27,077.00 Hourly Salary
	Calc Step - 0		Calc Step - 0 10.00
		Min	27,544.00
		Max	41,919.00 Next Inc Date

Dates

Last day worked	

14. Click the **Enter** button.

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

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

   Select the **Initiate Workflow** button to send the Reallocation 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).

Information

ⓘ PCR 1000005272 successfully sent to Work Flow

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

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

    The Initiate Reallocation Action is complete.

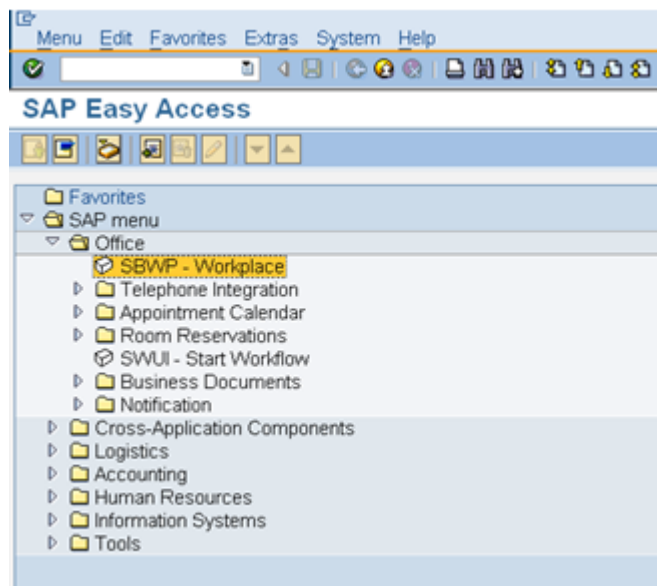   After Workflow Approvals have been received, process with the Complete Reallocation Action process.

Instructions for Completing the Action

Access Transaction:

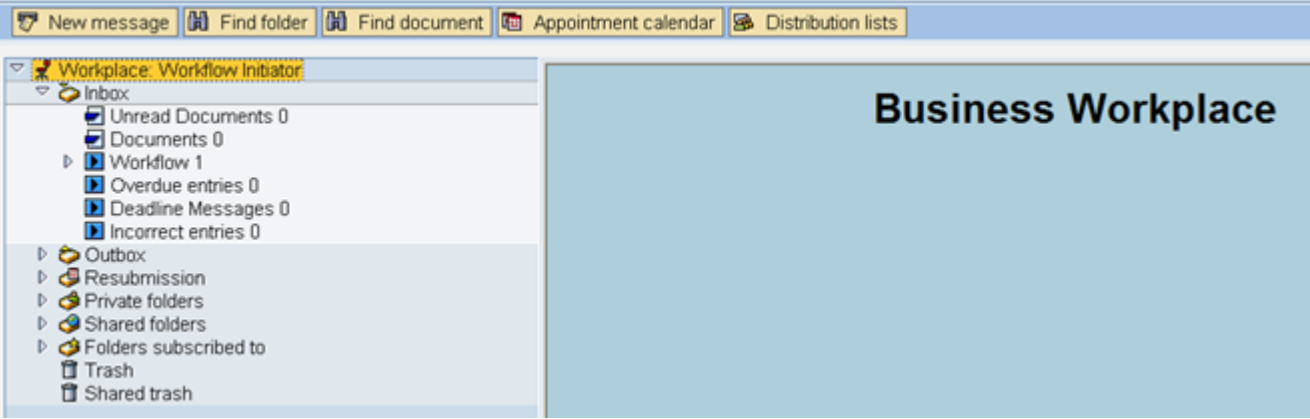**Via Menu Path:** SAP menu ==> Office ==> SBWP – Workplace

Via Transaction Code: SBWP

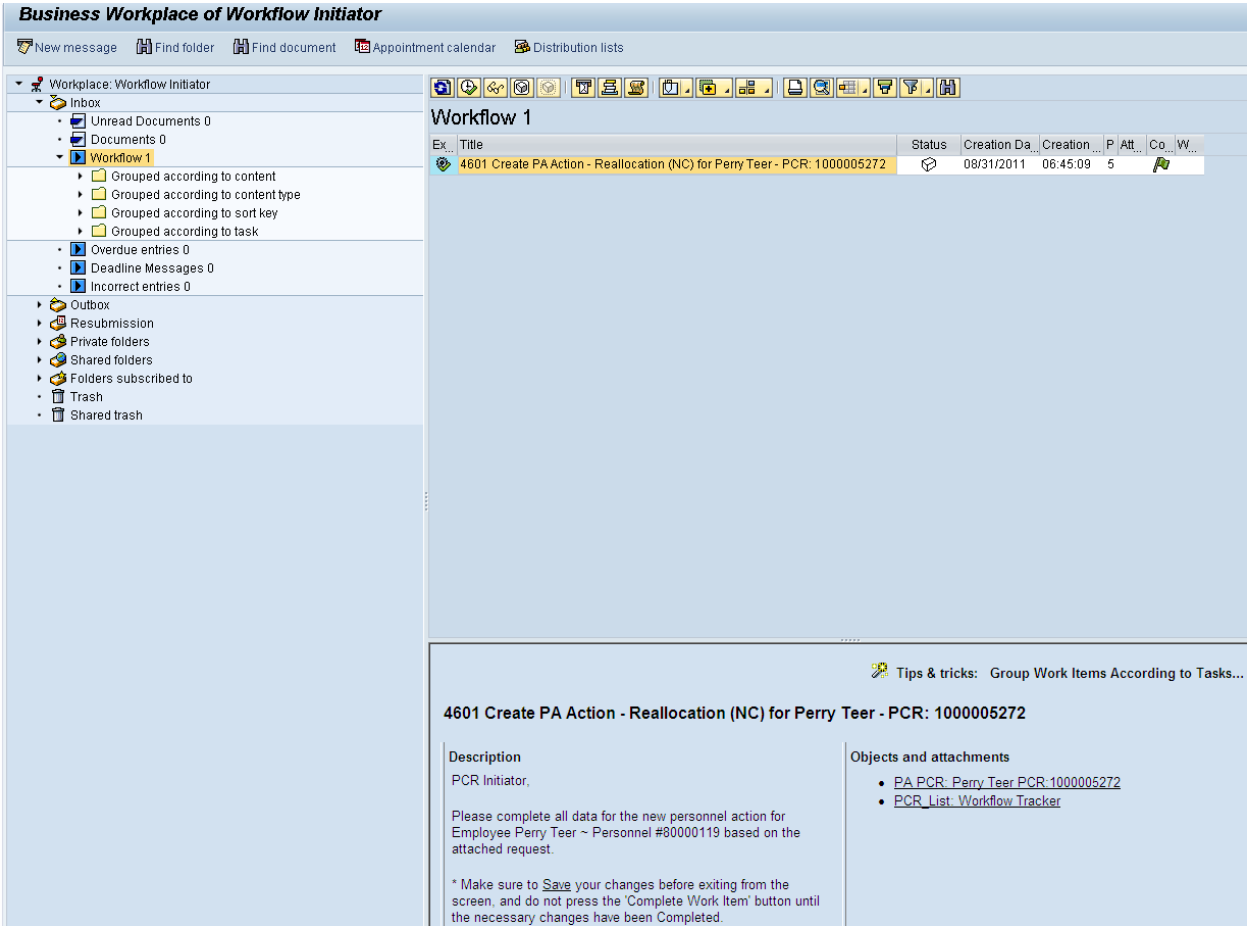19. Click the **SAP Business Workplace (Ctrl+F12)** button.

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


20. Select **Inbox >> Workflow**.

You can process using step 22 or step 23.

21. Select the **PCR** `4601 Create PA Action - Reallocation (NC) for Perry Teer - PCR: 1000005272` row.

    Double-click on row.

22. 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 Reallocation action will be launched.
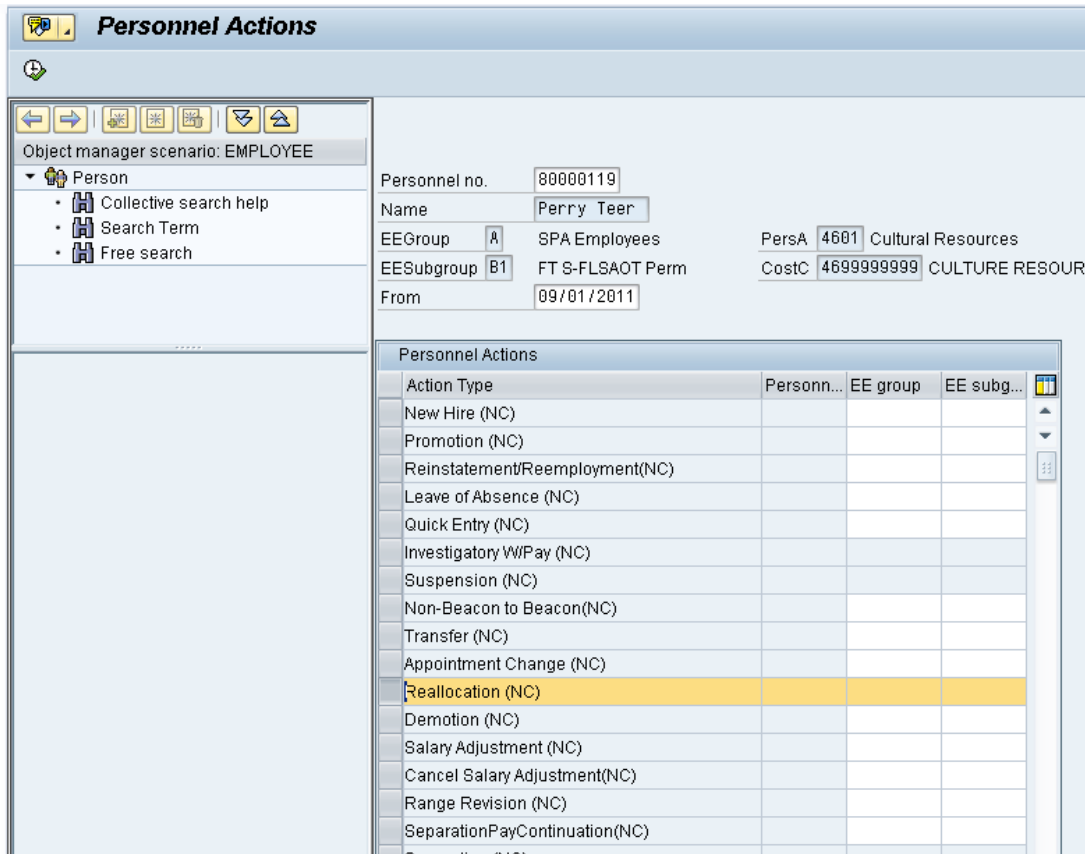
23. Update the following field:

Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From. **Example**: 09/01/2011

24. Highlight **Reallocation (NC)** action type.

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

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

Copy Actions (0000)

⤺ ⤻ 👤 | 🕐 Execute info group   ✏ Change info group

Pers.No. 80000119
Name Perry Teer
EEGroup A SPA Employees PersA 4601 Cultural Resources
EESubgroup B1 FT S-FLSAOT Perm
Start 09/01/2011 to 12/31/9999

Personnel action

Action Type ZA Reallocation (NC) ▼
Reason for Action 01 Reallocation Up

Status

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

Organizational assignment

Position 60083305 Office Assistant V
Personnel area 4601 Cultural Resources
Employee group A SPA Employees
Employee subgroup B1 FT S-FLSAOT Perm

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action	

26. Click the **Enter** ✅ button.

⚠ Record valid from 01/01/2008 to 12/31/9999 delimited at end

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

⚠ This entry deletes a record

The system will provide a yellow warning message informing you the existing record will be deleted. When the position was reallocated an infotype 0001 was automatically created. 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.
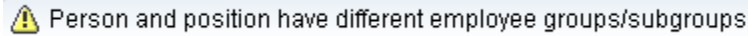
When the employee subgroup is different from the position employee subgroup you will receive a warning message. Click **Enter** to continue.

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

28. Click the **Enter** button.

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

Create Organizational Assignment (0001)

Org Structure

Personnel No 80000119   Name   Perry Teer
EEGroup A   SPA Employees   PersA 4601 Cultural Resources
EESubgroup B1 FT S-FLSAOT Perm   Statu Active
Start 09/01/2011 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 B1   FT S-FLSAOT Perm   Contract

Organizational plan
Percentage 100.00   Assignment
Position 60083305   201000002030
                     Office Assistant V
Job key   30000248   Off Ast
                     Office Assistant V
Org. Unit 20010136   48020102031
                     CR CDS A&H Progra…
Org.key   46014699999999

30. 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.

31. 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.

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

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.

Agency representative will need to enter the following fields:

- Related Work Experience

- Related Education Months

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

34. Update the following field:

Field Name	Description	Values
Reason	Reason for the action such as Reallocation	Enter value in Reason. **Example**: ZA

35. 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 Reallocation (ZA) and then click Enter to validate the data. Notice the Annual Salary field has retrieved the amount submitted via workflow (or the hourly field is appropriated).

If the employee is hourly, you will manually enter the hourly rate in the amount field; hit enter and the annual salary automatically calculates.

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

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

38. Click the **Complete Item** ✔ Complete Work 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.
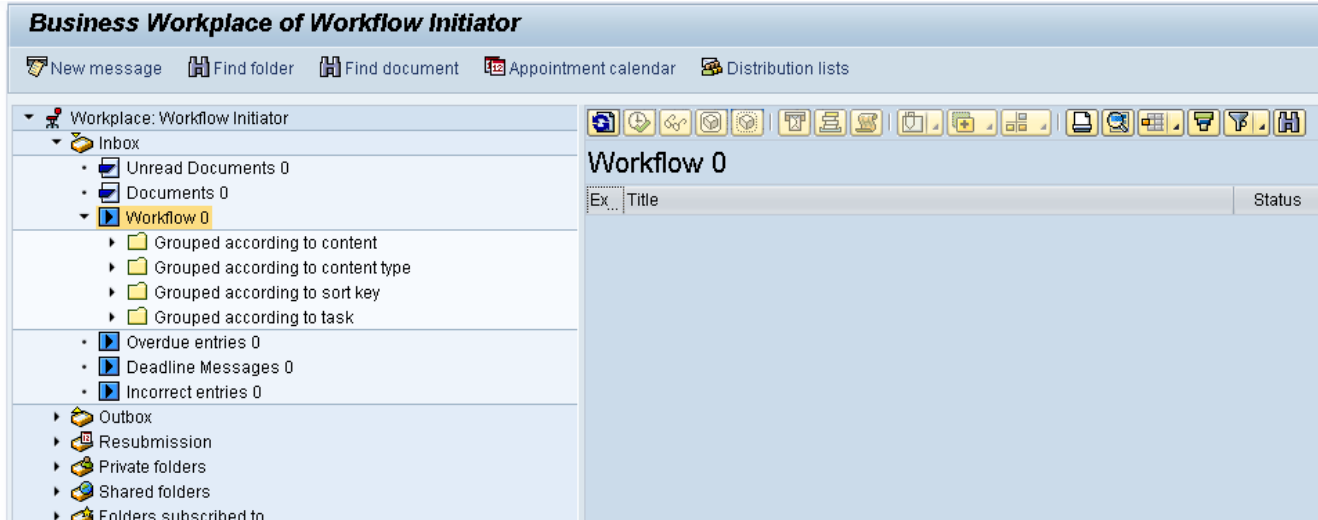
39. Click the **Back (F3)** ⬅ button.

    You can remain in this SAP Business Workplace and process additional PCRs, or click the Back to return to the main SAP screen.
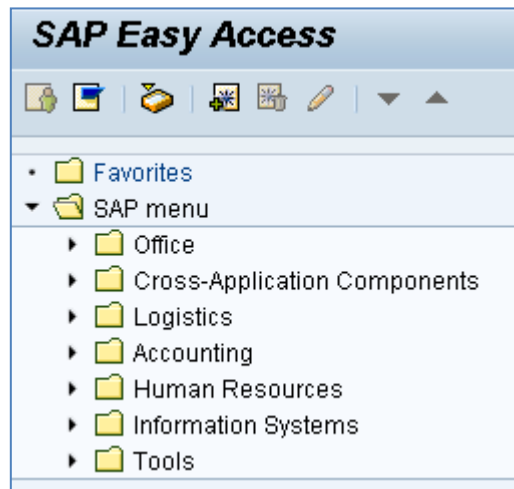
The Reallocation action is complete, but we recommend reviewing via PA20 all infotypes that have been processed.

Additional Resources

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

Change Record

Change Date: 4/13/20 – Changed by C. Ennis
Changes: Updated format, assigned reference number, and made accessible