SEPARATION PAY CONTINUATION ACTION

PER-84 | TRANSACTIONS ZPAA076, SBWP, PA40

PA

The purpose of this Business Process Procedure is to explain how to process a separation with pay continuation action in the Integrated HR-Payroll System.

Business Process Procedure Overview:

Separation with Pay Continuation from state service occurs when an employee Retires as a Law Enforcement Officer that qualifies for LEO Retirement supplement, or when a reduction in Force with severance has occurred. The HR Administrator gathers the approved employee data and executes the Separation Pay Continuation Action Personnel Change Request (PCR) form within workflow using transaction ZPAA076.

- **01- Retirement (Law Enforcement Supplement)** – paid to eligible LEOs until they reach 62nd birthday. (Only for eligible LEOs who are currently contributing to the LEO Retirement system.)

  NOTE: Create the Separation Action the next business day after you have completed the Separation Pay Continuation Action.

- **02 - Reduction in Force Severance and/or Health Insurance** – employee is reduced in force for reasons of shortage of funds or work, abolishment of a position, or other material changes in duties or organization; the Office of State Budget has determined that the employee is eligible for severance (Requires OSHR approval). This action and reason will be used for paying severance; action and reason also used for employee until he or she is no longer eligible for health insurance (normally 12 months unless the employee is provided health coverage on a non-contributory basis by a subsequent employer). The agency will separate the employee after the 12 months (ZG-Separation), but they must coordinate with BEST HR/Benefits prior to processing the Action.
- **04 - Separation – Short-Term Disability** – employee is separated but still receiving Short-Term Disability benefits.

NOTE The following are the current comment requirements for RIF Separation Actions:

- If the agency is requesting approval to pay either of the severances to an employee, the PCR for Separation Pay Continuation Action must include calculations for each payment type and a statement that reemployment for the employee that would satisfy the State's obligation to pay severance is not available.
- If the position occupied by the employee being separated is being abolished, the PCR for Separation Pay Continuation Action must include a statement to that effect. If a position other than the position occupied by the employee is being abolished, the PCR for Separation Pay Continuation Action must include the position number, including the position's classification and salary grade. If severance is being requested for the employee and no position is being abolished, the PCR for Separation Pay Continuation Action must include an explanation as to how "economies in the State Budget" are being achieved.
- The PCR for Separation Pay Continuation Action must also include a statement that "adequate funding is budgeted in appropriate line item for cost of severance. Reference 606# ________. This request submitted consistent with GS 143-27.2."

Tips and Tricks:

- Notes can 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 can be copied and pasted into new notes within the Action.
- 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).

Information

Important!
Please review the employee's action history prior to creating the Separation PCR to ensure that the Action/Reasons below have been canceled**.**

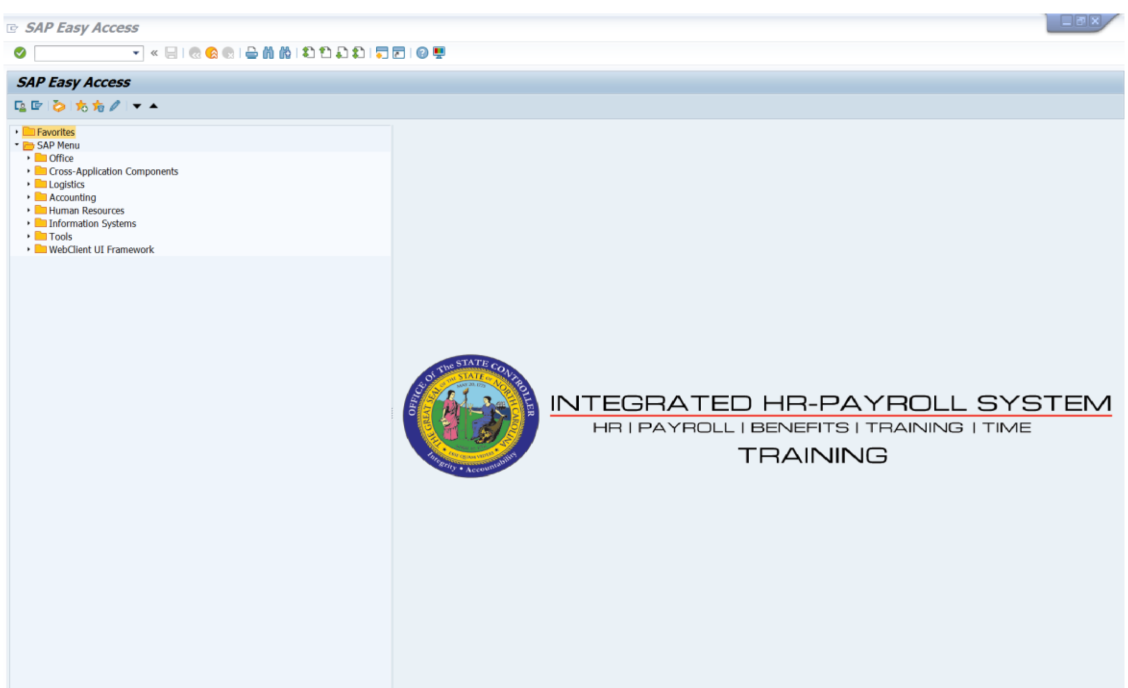
- ZC – Salary Adjustment / 07 – Acting Pay
- ZC – Salary Adjustment / 04 – Temp In-Range for Job Change
- Z1 – Promotion / 03 – Acting Promotion

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.

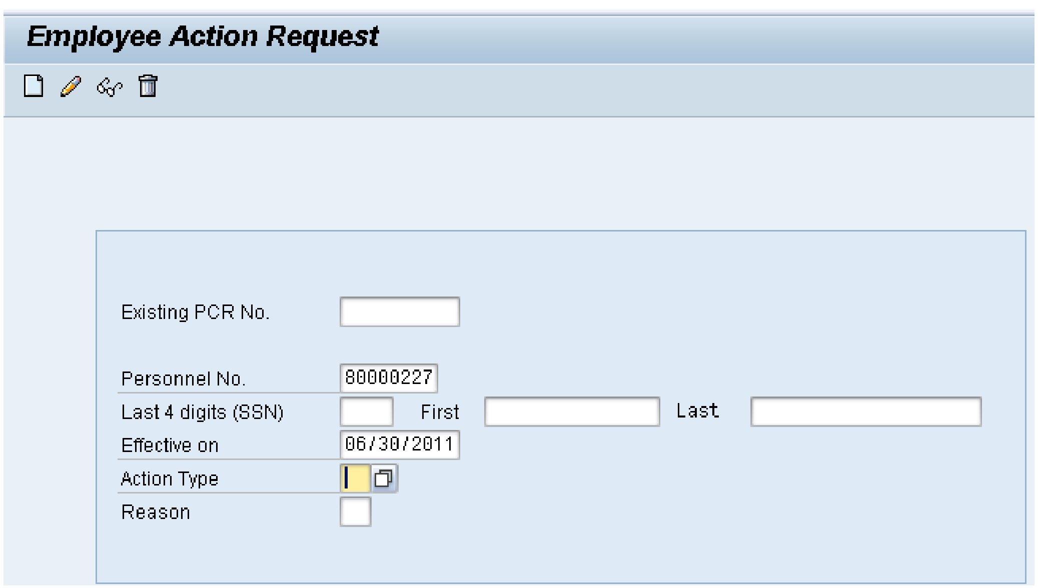
Information

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 menu at the top of the screen:

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



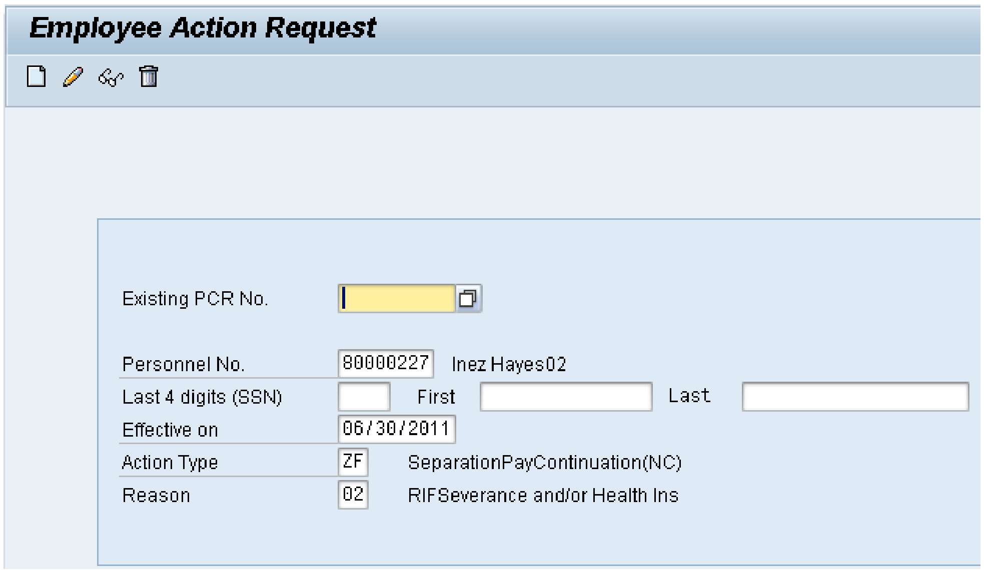
3. Update the following field:

Field Name	Description	Values
Personnel No.	Unique employee identifier	Enter value in Personnel No. **Example**: 80000227

4. Click the **Enter**  button.

   Enter the Personnel Number of the individual to be separated with pay continuation. Click Enter to retrieve the name of the individual and verify you have the correct Personnel Number.

   NOTE: Enter the SSN and name for New Hires only.



5. Update the following fields:

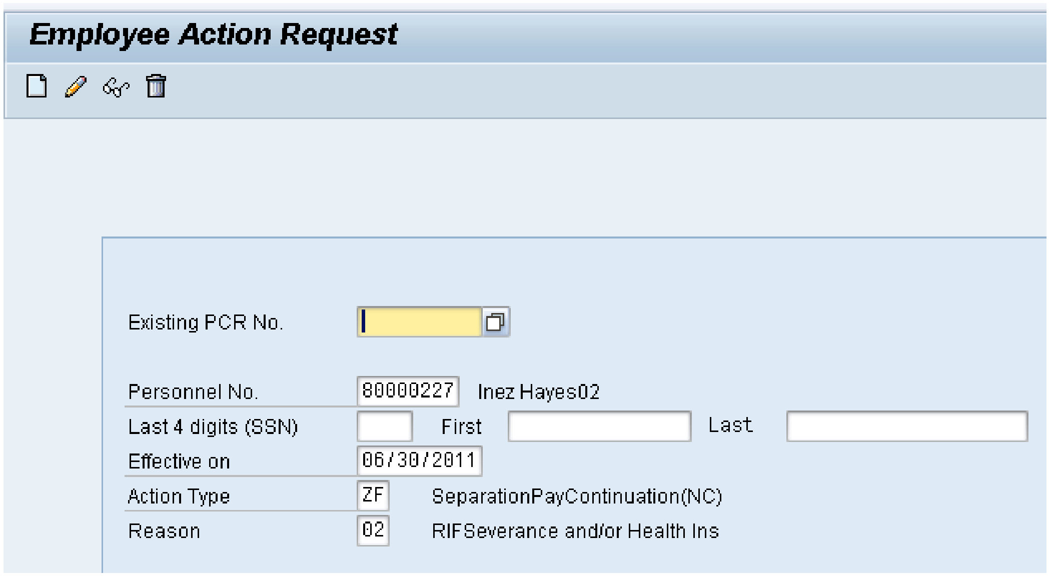
Field Name	Description	Values
Action Type	An action is a grouping of activities to perform a specific task. The action will prompt you for the Infotypes required to complete the task.	Enter value in Action Type. **Example**: ZF
Reason	Reason for the action, such as RIF Severance and/or Health Ins	Enter value in Reason. **Example**: 02

6. Click the **Enter**  button.

   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.



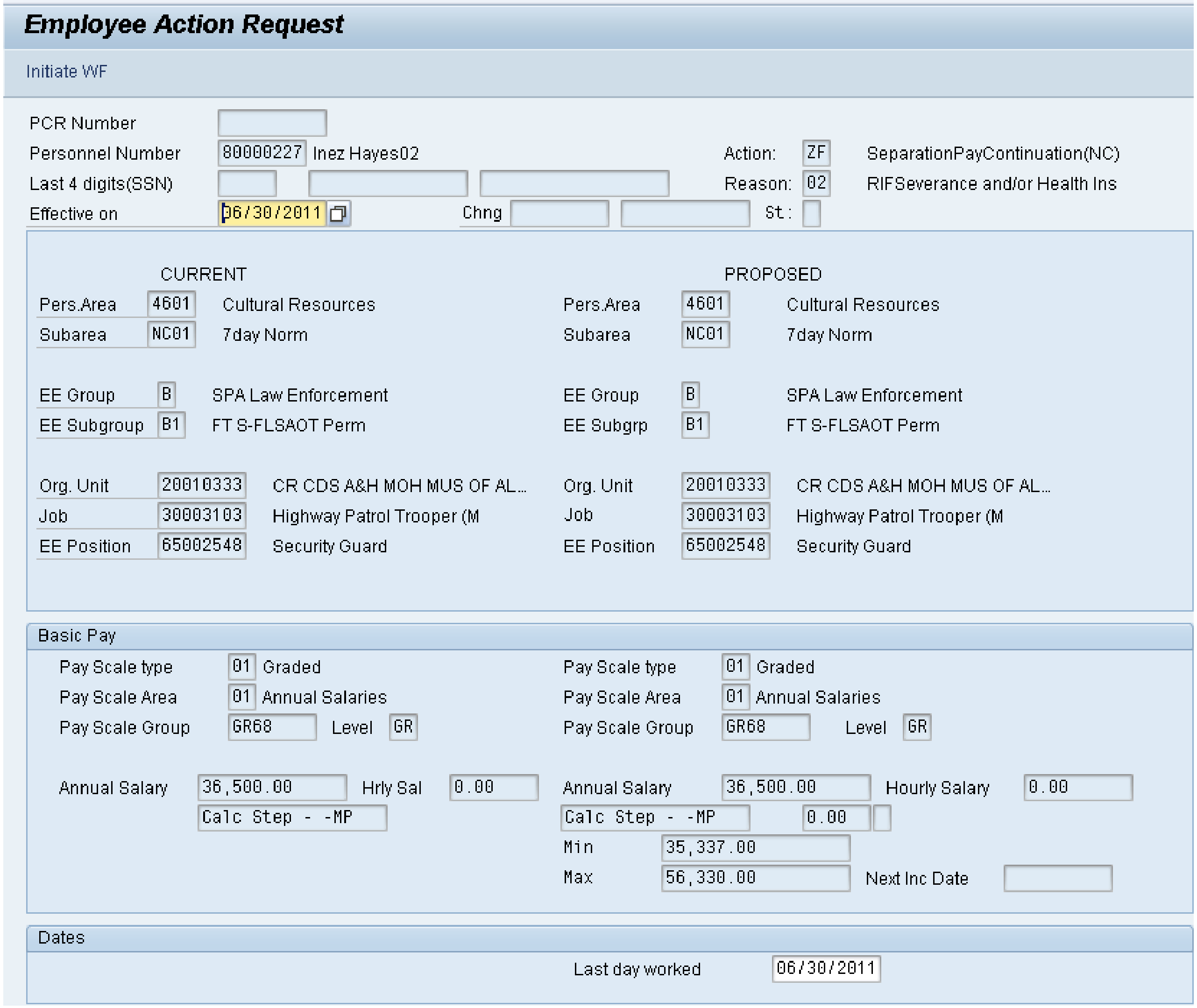
7. Click the **Create (F5)** button.

   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.

   *Fields with √ check marks are mandatory.



8. Update the following field:

Field Name	Description	Values
Last day worked	Employee's last day of work	Enter value in Last day worked. **Example**: 06/26/2008

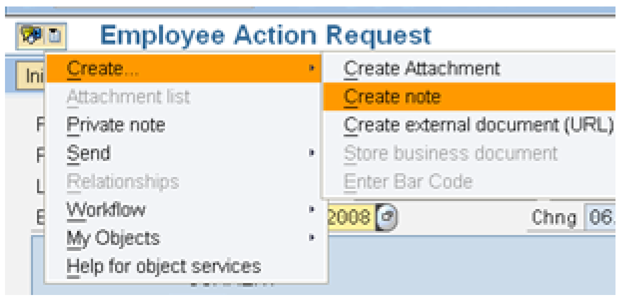
9. Click the **Enter** button.

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

    The system will not allow you to enter a date past the current date for the separation.

11. 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 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.



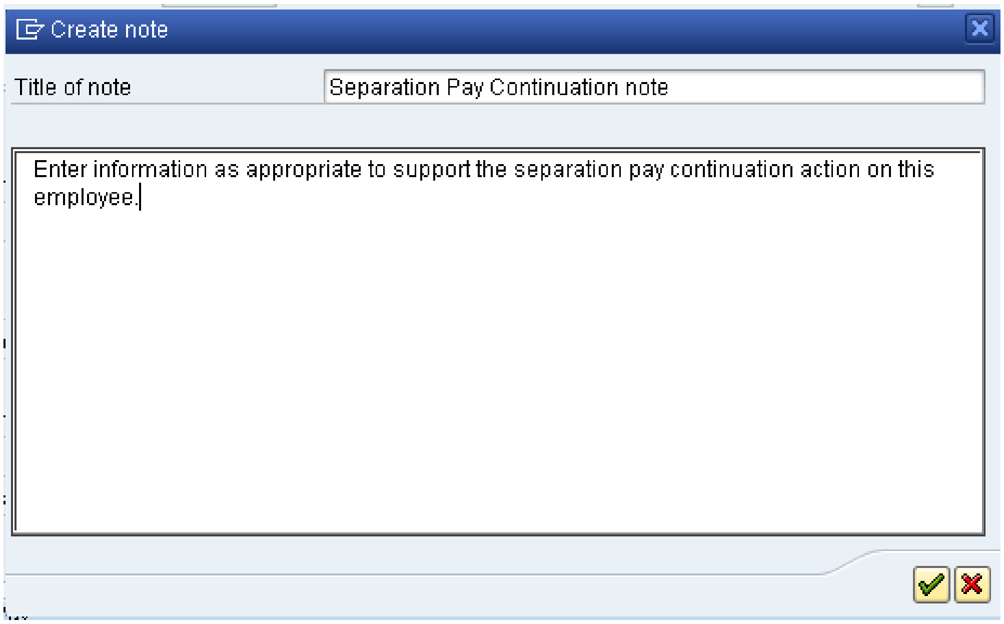
12. Click the **Services for Objects**  button.

13. 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.

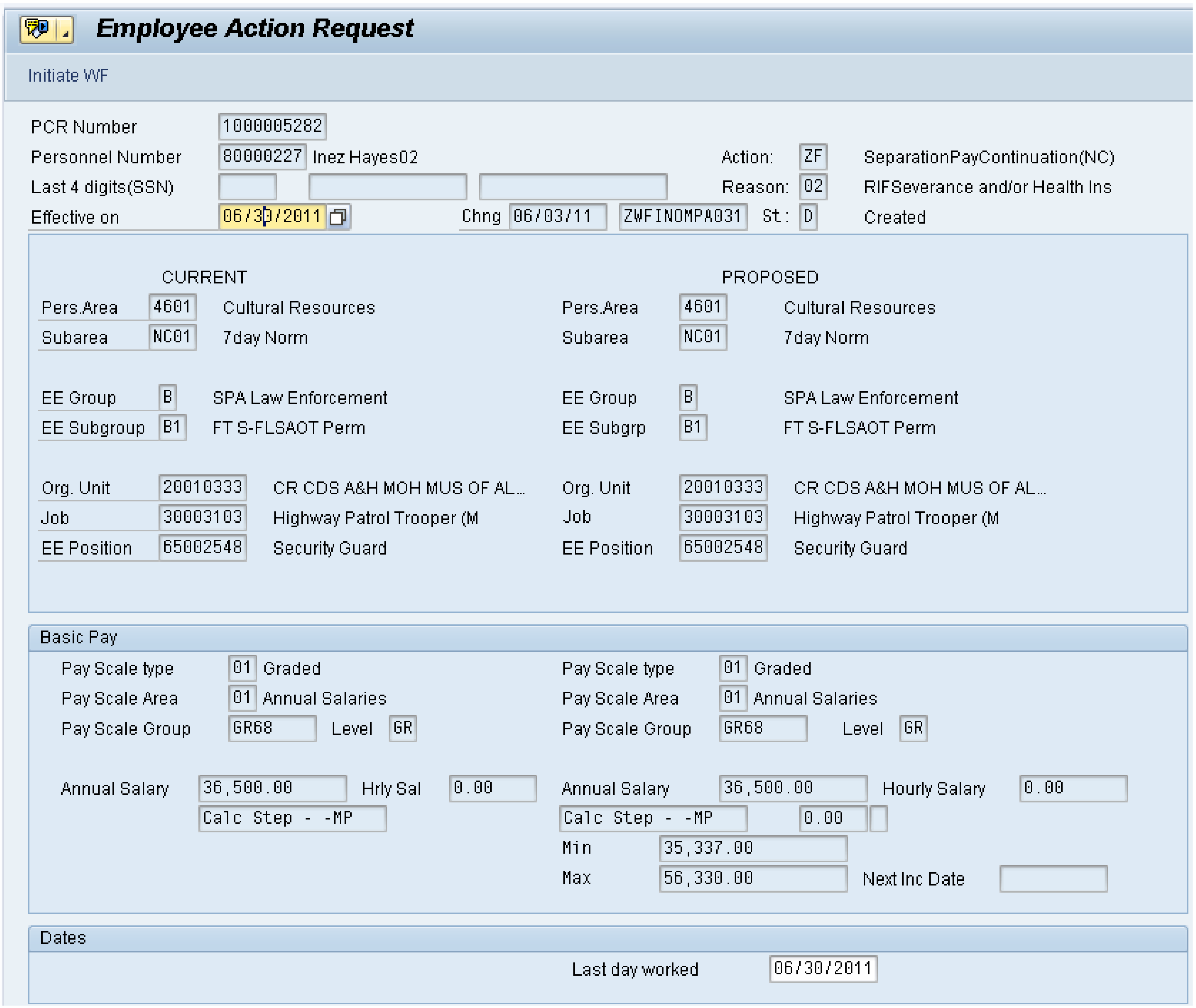
Notes entered during PA Workflow must follow OSHR's Action Notes Template:
https://www.osc.nc.gov/documents/action-notes-template



14. 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**: Separation Pay Continuation note
Long text	An open text field	Enter value in long text. **Example**: appropriate information

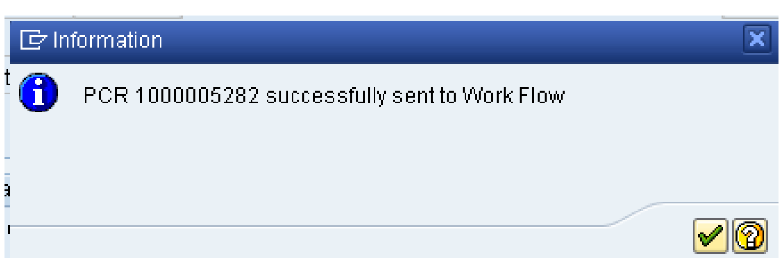
15. Click the **Copy (Enter)**  button.



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

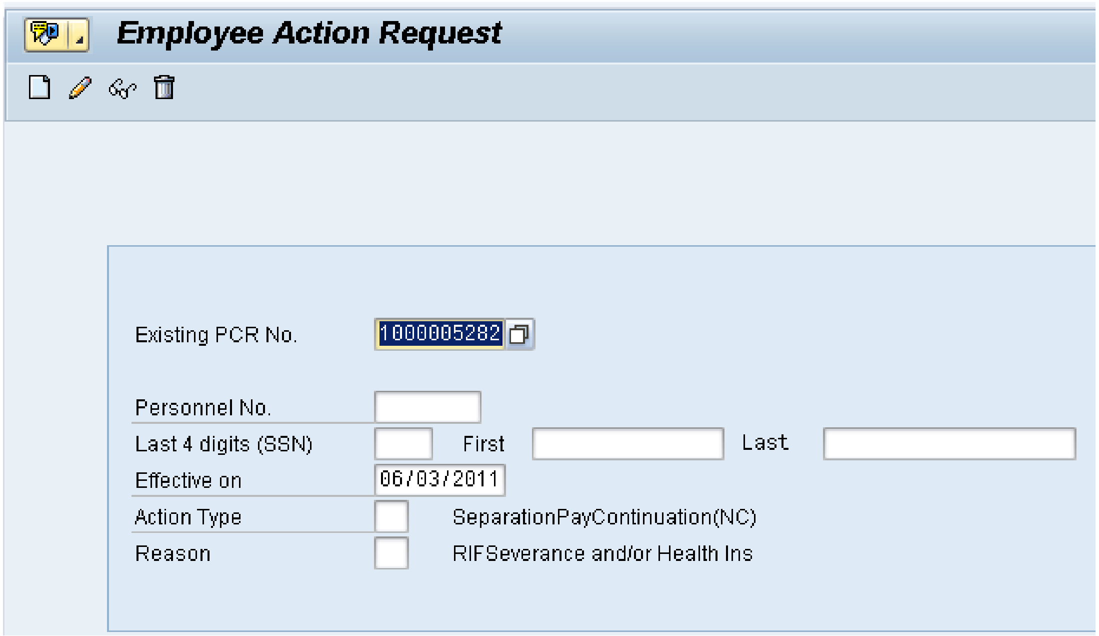
17. Click the **Initiate WF** Initiate WF button.

Select the Initiate Workflow button to send the Separation Pay Continuation 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).



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

The next steps show how to display the data for any PCR, including notes and/or attachments. *No changes can be processed on any PCR which is in the approval process or has been approved.*



19. Update the following field:

Field Name	Description	Values
Existing PCR No.	Personnel Change Request number	Enter value in Existing PCR No. **Example**: 1000005282

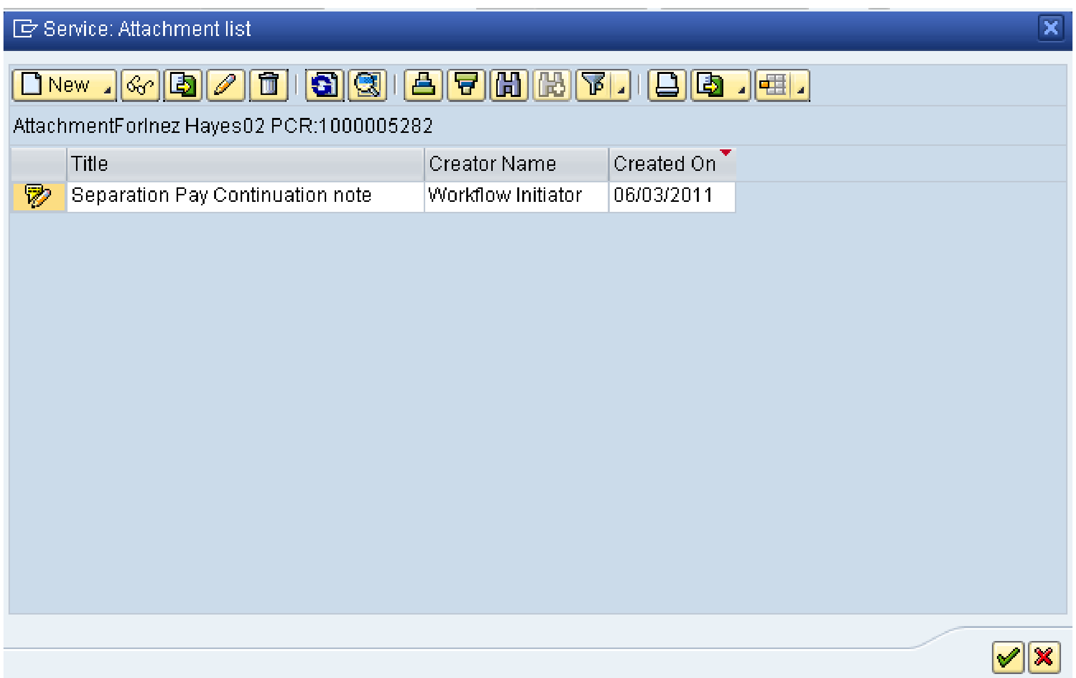
20. Click the **Display (F7)**  button.

Notice that you are not able to change a PCR if it has been submitted to workflow already via the Initiate Workflow button. An error message will appear at the bottom of the screen. Once the PCR has been submitted, you will be able to display the data only (including any notes and attachments which may have been saved on the PCR).

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

22. Click the **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 one attachment available.



23. Select the **Title** Separation Pay Continuation note row.

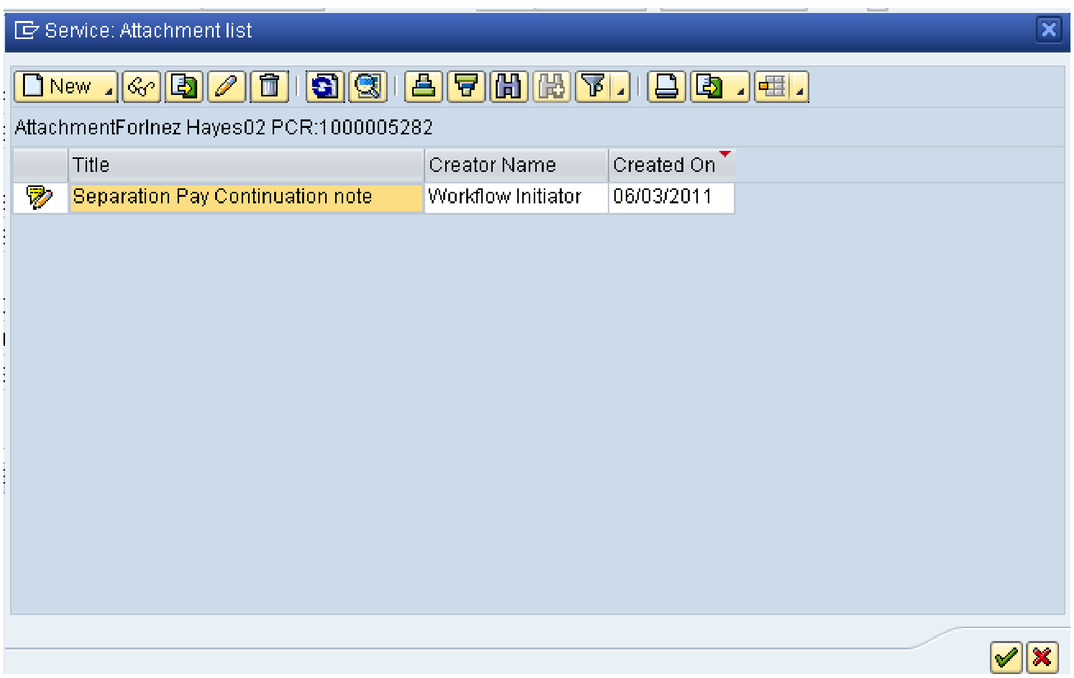
24. Click the Display  button.

    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. This extra window does not normally display.

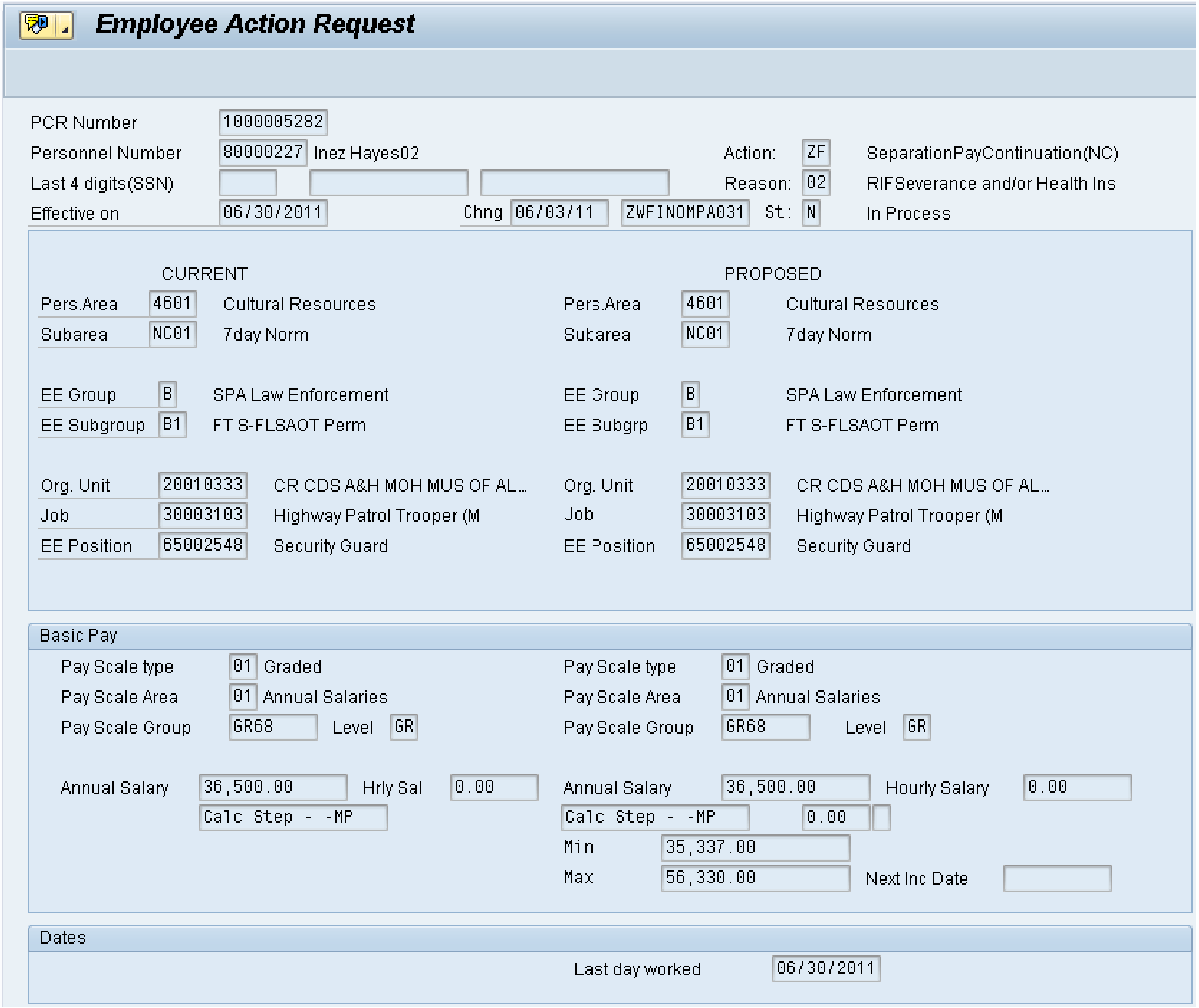
    If multiple notes and/or attachments have been added to this PCR, they will be listed here. This is where you would display and copy the data if you wanted to also attach the notes/attachments to the corresponding Action once approved.

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

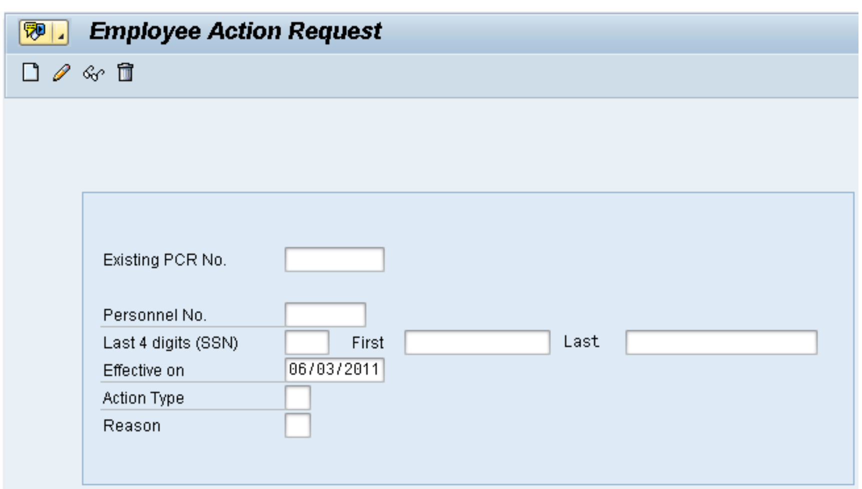
    Review the information as appropriate and close the window when complete. This text may be copied using CTRL+C and then pasted into another note attachment to an Action.



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



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



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

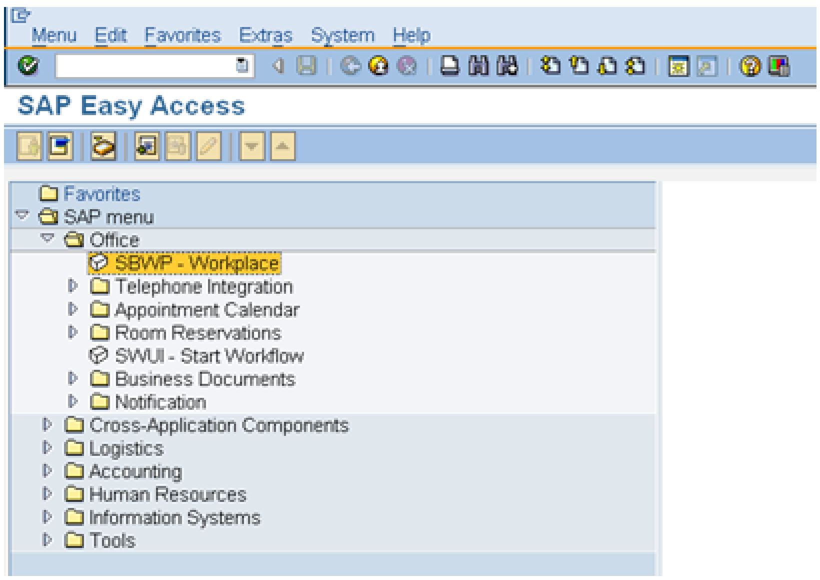
29. Now proceed to completing the Action.

Instructions for Completing the Action

Access Transaction:

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

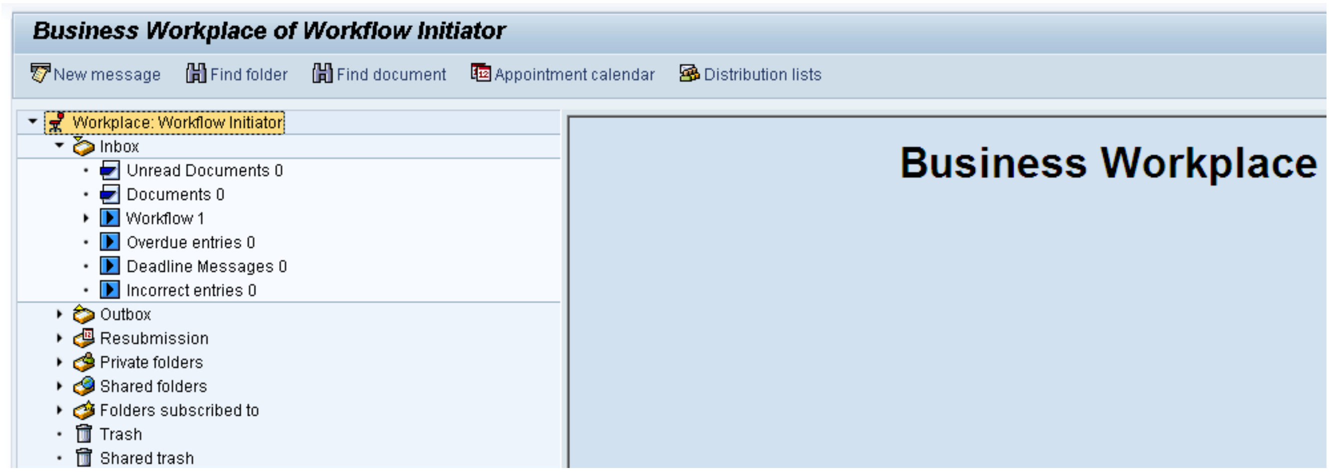
Via Transaction Code: SBWP, PA40



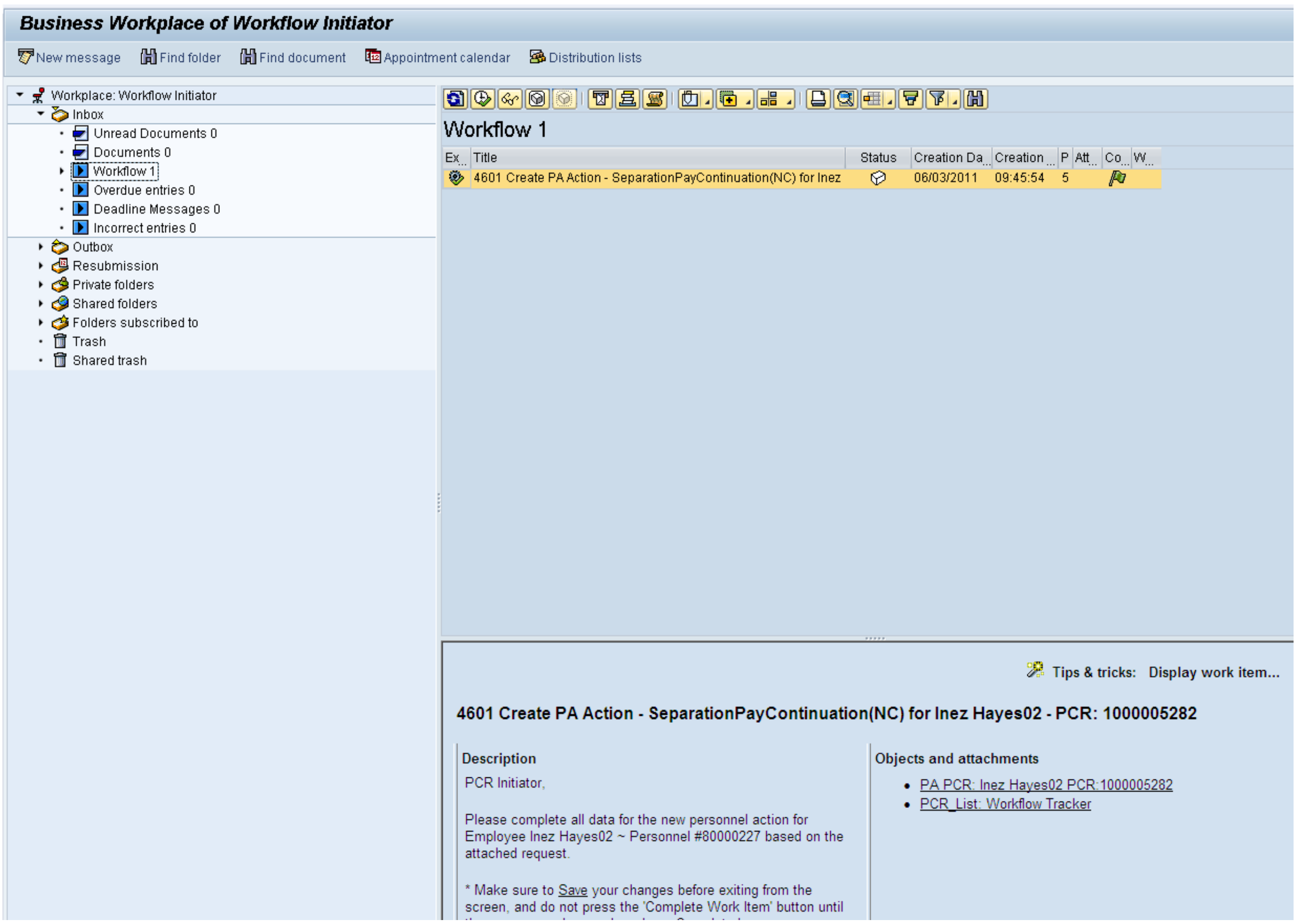
30. Click the **SAP Business Workplace (Ctrl+F12)**  button.

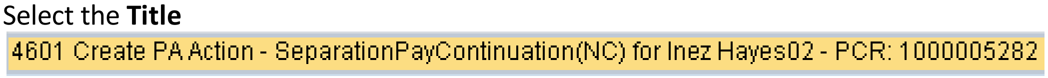
    These instructions assume you have initiated the Separation Pay Continuation Personnel Change Request (PCR) in workflow already, and you have an approved PCR ready to be processed as a Separation Pay Continuation in the system. If you do not have an approved PCR, please follow the instructions to initiate a Separation Pay Continuation action, "PA Workflow_ Initiate Separation Pay Continuation Action."

    You will begin the Separation Pay Continuation action by using transaction code [ZPAA076] (initiate PA workflow), which results in a Personnel Change Request (PCR) number. After all of the approvals have been completed, execute the PCR from the SAP inbox. Only the initiator of the Separation Pay Continuation PCR will receive the PCR back in their inbox for further processing. When you process the approved PCR from your inbox, the system automatically takes you to the Separation Pay Continuation Action screen.



31. Select **Inbox >> Workflow**.



32. Select the **Title** 

row.

33. Click the **Execute**  button (or double-click on the line).

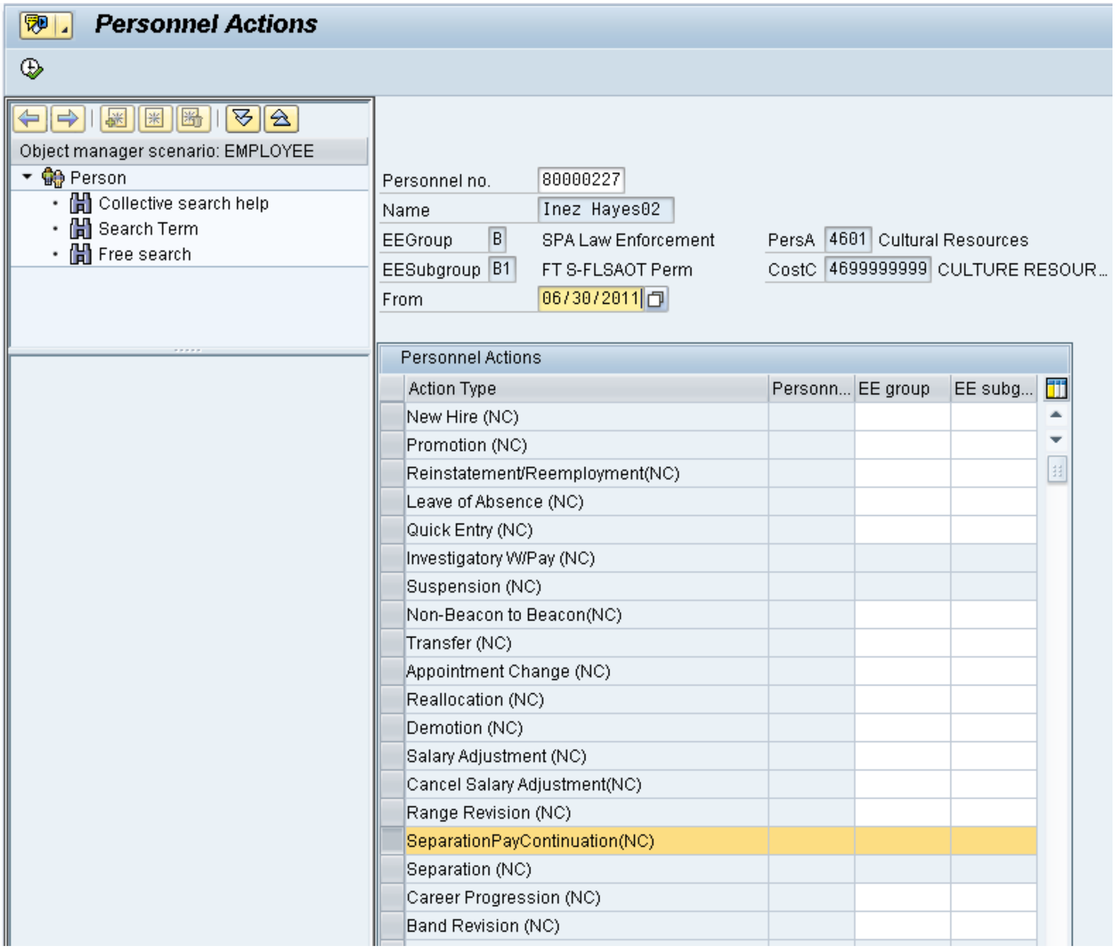
A list of your approved (or rejected) PCRs are listed on the right side of the screen. Select the PCR to be processed and click Execute (or double-click the PCR). You can view the PCR details and/or

Workflow Tracker details prior to executing the PCR if desired. Once executing the PCR, the Separation Pay Continuation action will be launched.

If you are not able to complete the entire Separation Pay Continuation action, you can complete the workflow or update single infotypes using PA30, but you must re-execute the action via transaction code PA30 in the future to complete the remaining infotype screens, or some of the data will not have been created on their record. By not completing the infotypes in the order presented you risk background processing to not create data correctly.

PCR List:

- All columns can be sorted and adjusted based on your personal preference for viewing the data.
- Execute column – you can either click the Execute button to enter a PCR for processing or double-click anywhere on the PCR line.
- Title column
    - Agency
    - Type of action (what it is requesting)
    - REJECTED = this PCR has been rejected
    - PCR #
    - Personnel # (if applicable)
- Status column – contains the reserved box – if it's white, everyone within the approval bucket can view the PCR in their inbox; if it's gray/blue, you have reserved this PCR, and no one else can see it in their inbox (until you release it).
- Creation Date – the date the PCR was created
- Creation Time – the time of day the PCR was created
- Priority – the priority of the PCR set by the approvers. Initiators do not have the ability to set the priority unless it has returned to their inbox for further processing. Approvers can set priority for workflow items in their inbox. Once the priority is set, all approvers will see the priority assignment for a workflow item. By default, all workflow items are set to "5" Medium. Priorities are a global setting and are denoted with a color ledger.
    - 1 = Highest – Express
    - 2 = Very high
    - 3 = Higher
    - 4 = High
    - 5 = Medium
    - 6 = Low
    - 7 = Lower
    - 8 = Very low
    - 9 = Lowest



34. Update the following field:

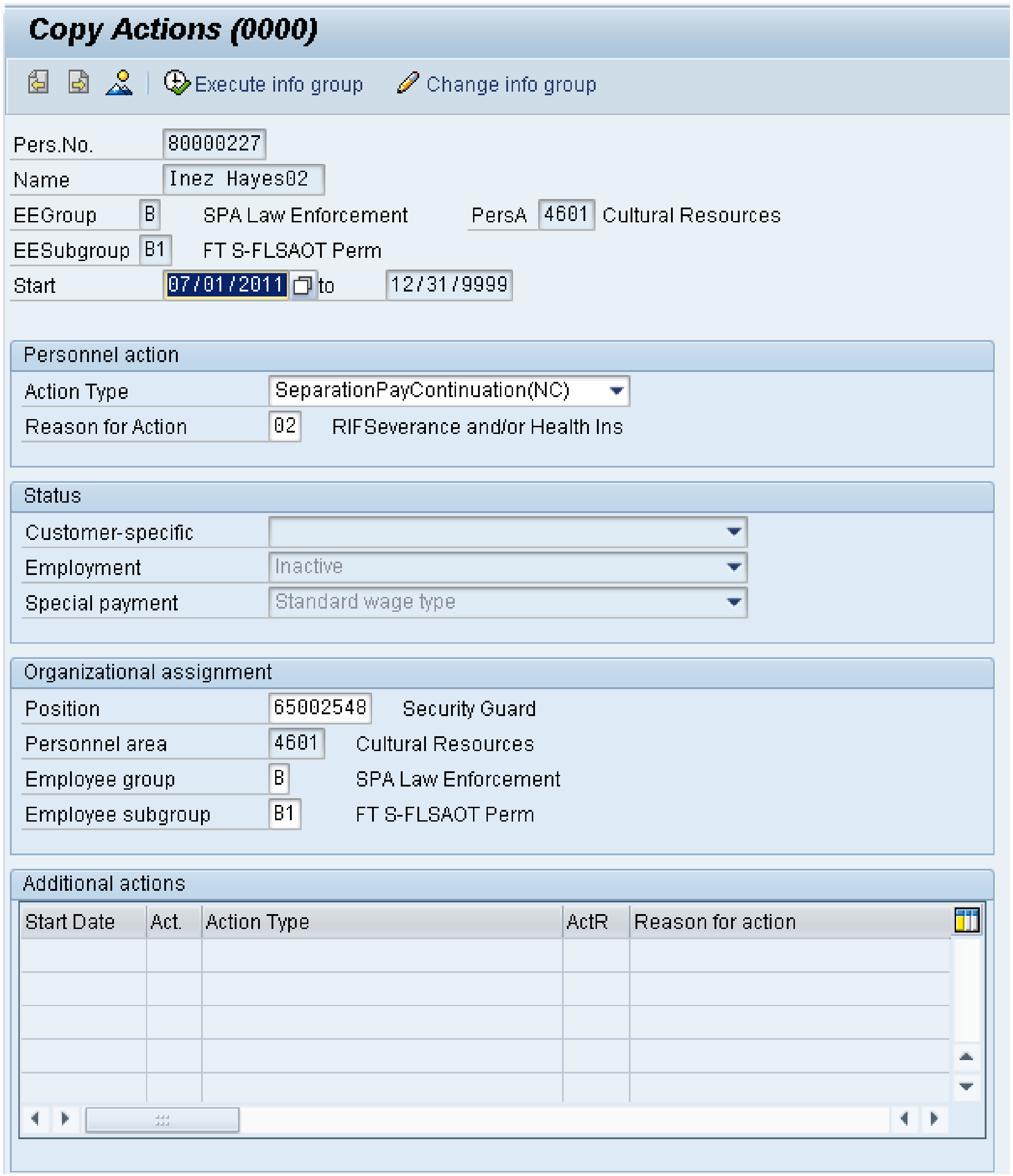
Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From. **Example**: 06/30/2011

35. Highlight the **SeparationPayContinuation(NC)** action type.

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

    The effective date is the last day worked. The SAP system will automatically add a day to your date. For example: Employee is separating 6/30/2011. This is the date you enter. The system will add the one day to make it 07/01/2011.

    When you have received approval to process the action, you will enter the effective date on the first Personnel Actions screen. The next screen, IT0000 defaults one day after. This date should not be changed except for IT0416 (Time Quota Compensation), which should be changed to effective date of the action (06/30/2011 on this example). If the date is changed for any other infotype, the employee will not receive the last day of pay.

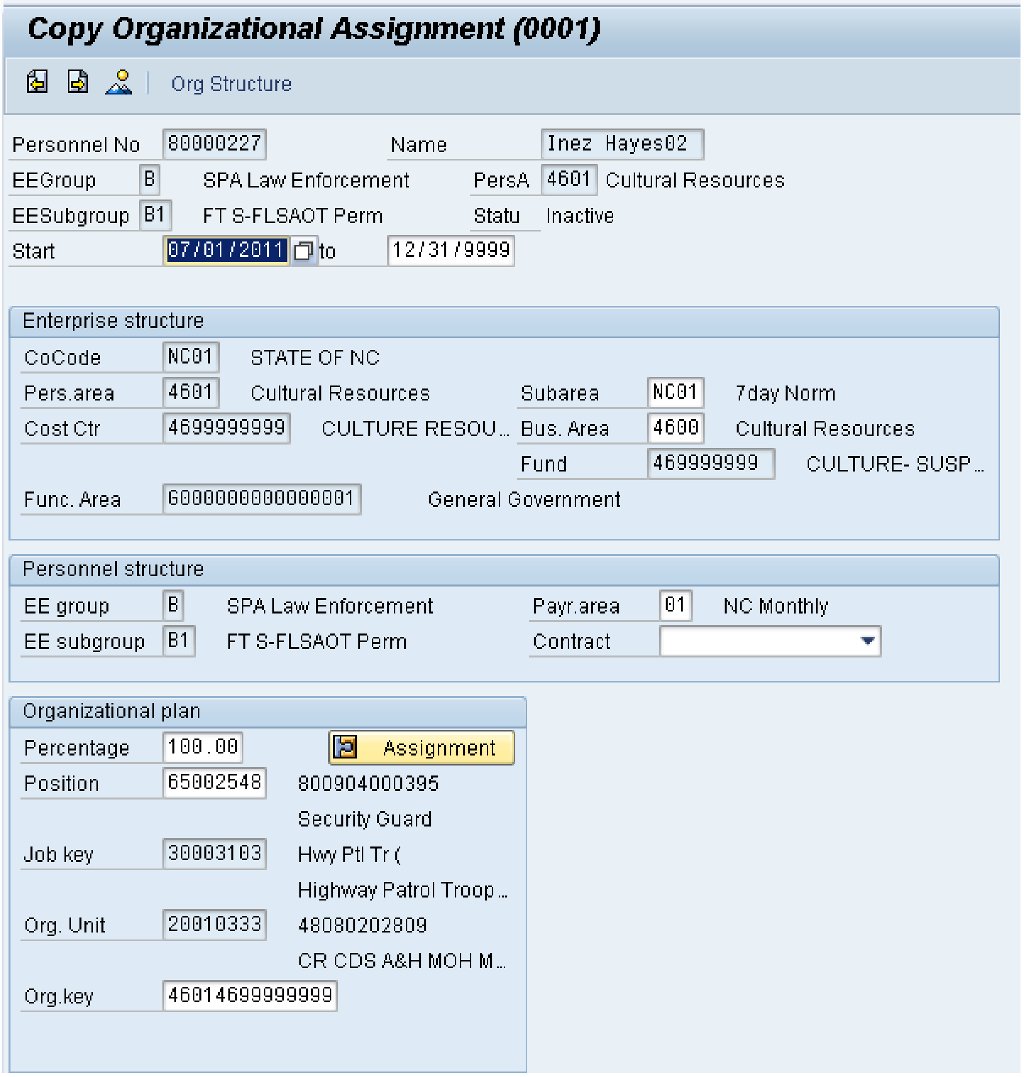


37. Click the **Save (Ctrl+S)**  button.

38. Click the **Enter**  button.

    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 employee's record for the first time.

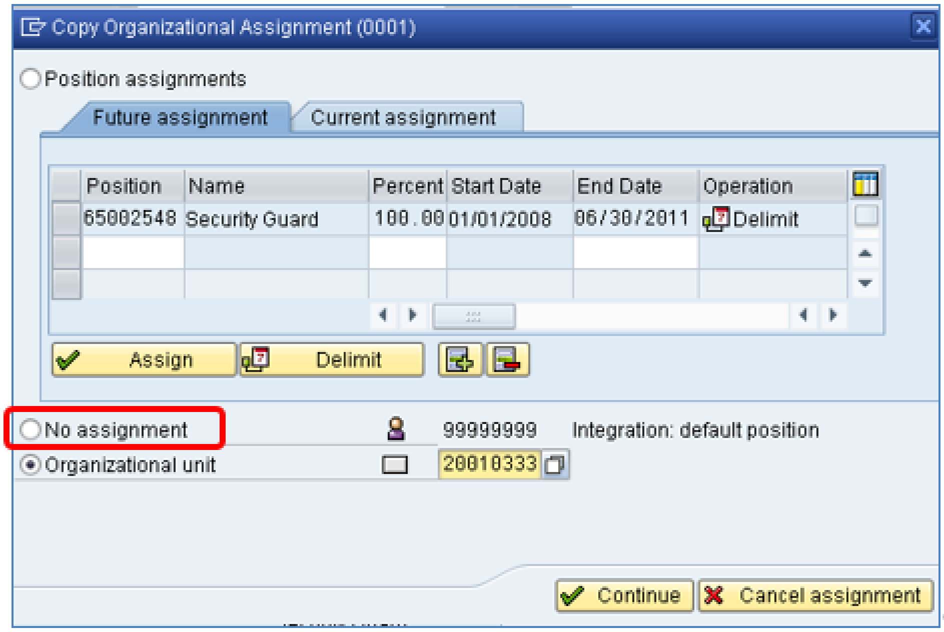
    Best practice is to review all data and click Enter to allow the system to validate the data.



39. Click the **Assignment** 

button.

For record purposes, when processing a Separation Pay Continuation action, the employee and position will be attached to the existing organizational unit or special created org unit within the Agency.



40. Click the **Organizational unit** 

radio button.

Information	Do <u>not</u> click the *No Assignment* button.

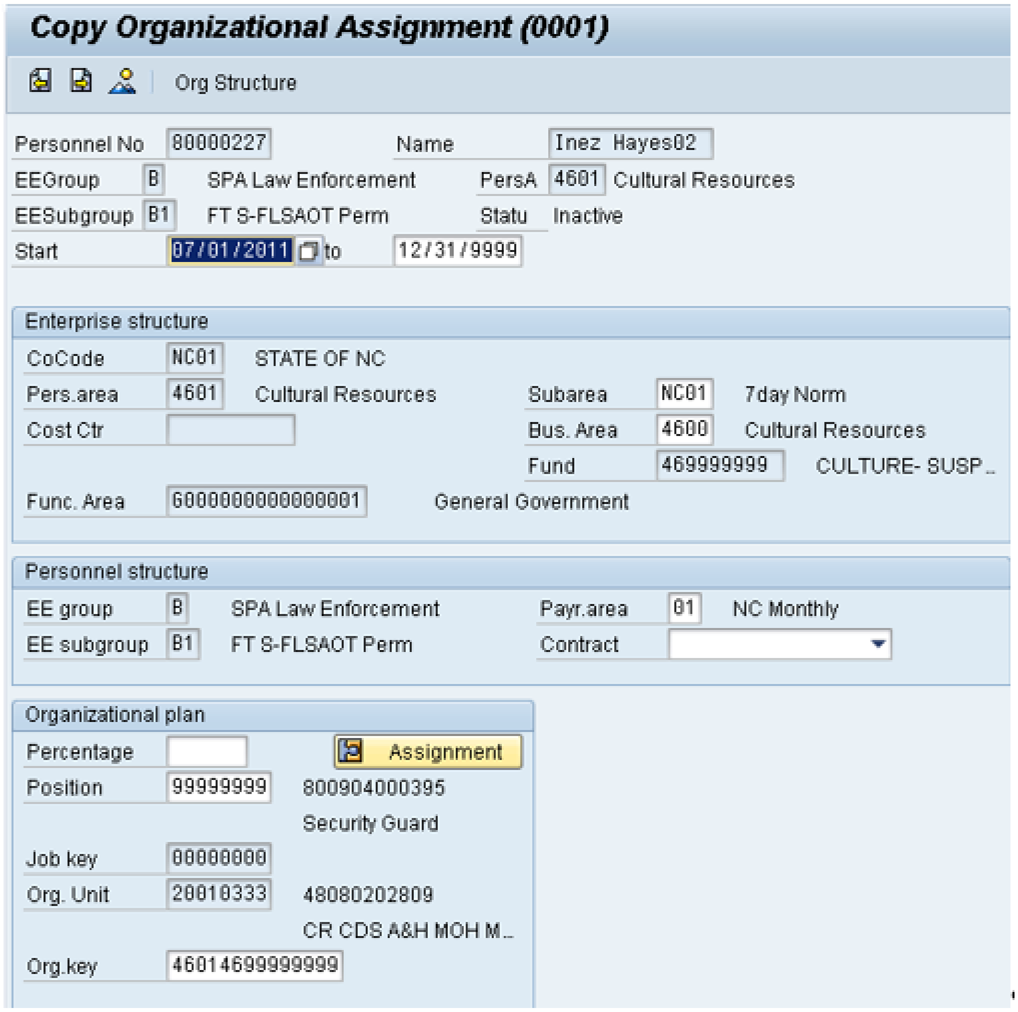
41. Update the following field:

Field Name	Description	Values
Organizational unit	Code identifying the organizational unit.	Enter value in Organizational unit. **Example**: 20010333

You can type the appropriate organizational unit code for the Agency in the field, or click on the matchcode search button and choose the Structure search tab to locate the appropriate organizational unit code for the Agency.

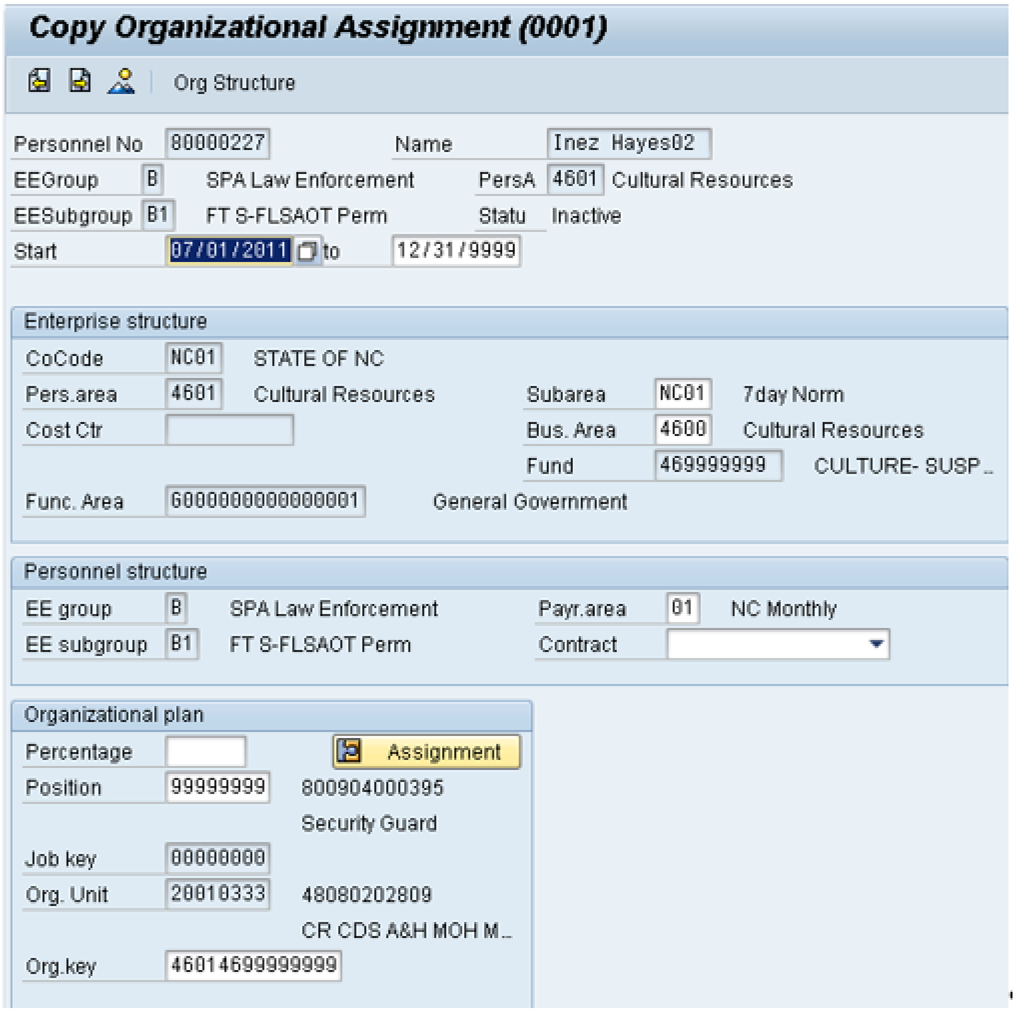
42. Click the **Continue** 

button.



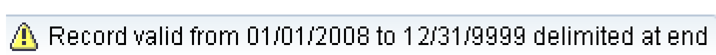
43. Click the **Save (Ctrl+S)** button.

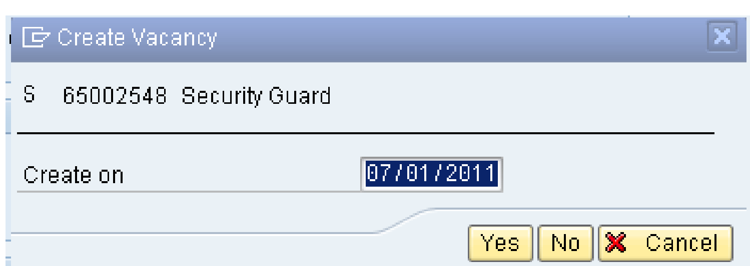
The system changes the Position to 99999999 (eight 9s).



44. Click the **Enter** button.

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

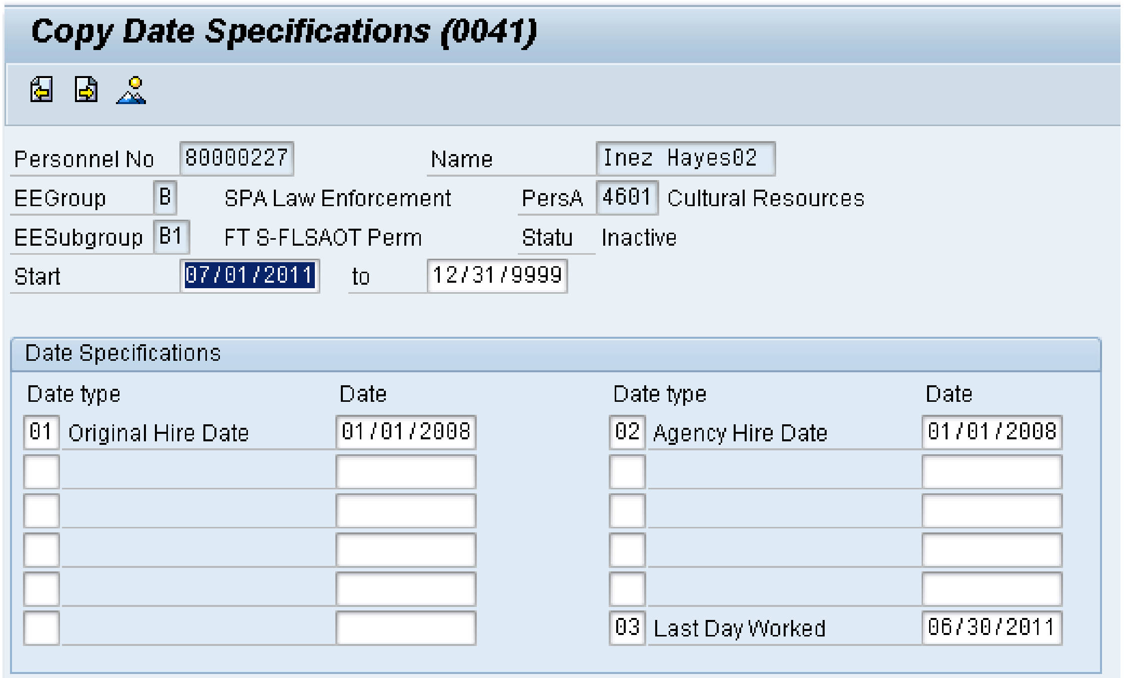




After you save the infotype, the percentage will default to 100%.

45. Click the **Yes** Yes button.

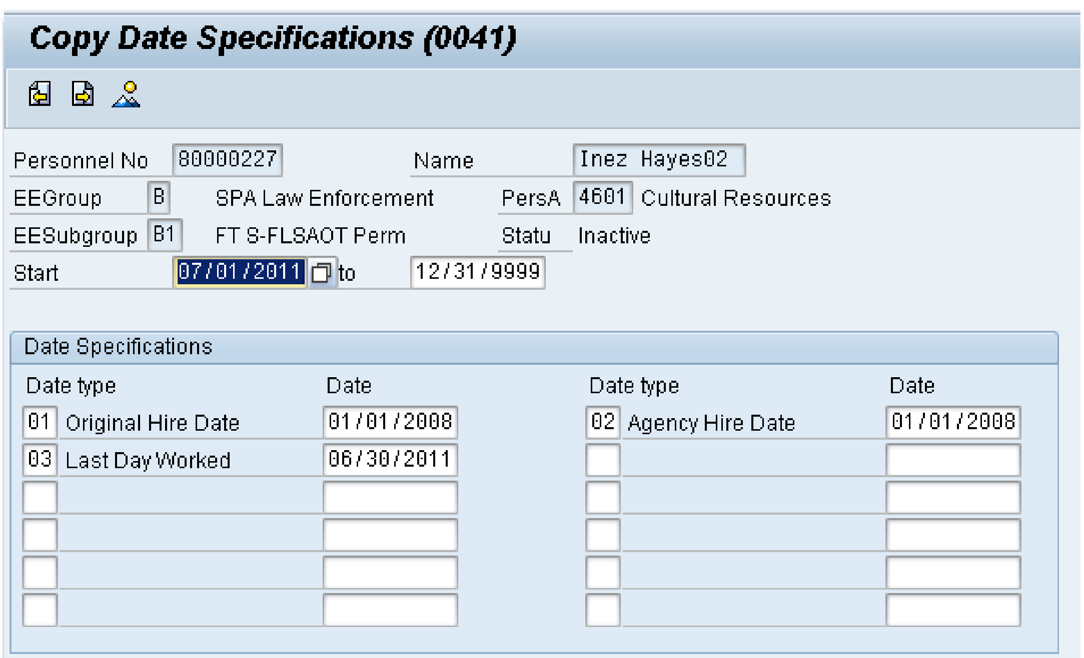
This will open the position as vacant when the Separation Pay Continuation action is complete.



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

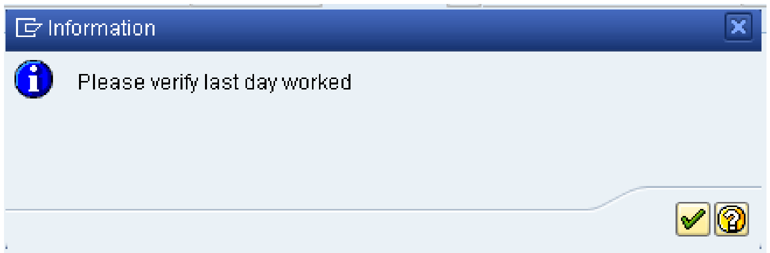
The Last Day Worked field should fill in by default. If not, enter the type 03 for the Last Day Worked and enter the date of the last day worked.

NOTE for RIF: For RIF, create an infotype 0041 for RIF notification if this was not already done. Also create infotype 0019, subtype #22 RIF Eligibility ends.

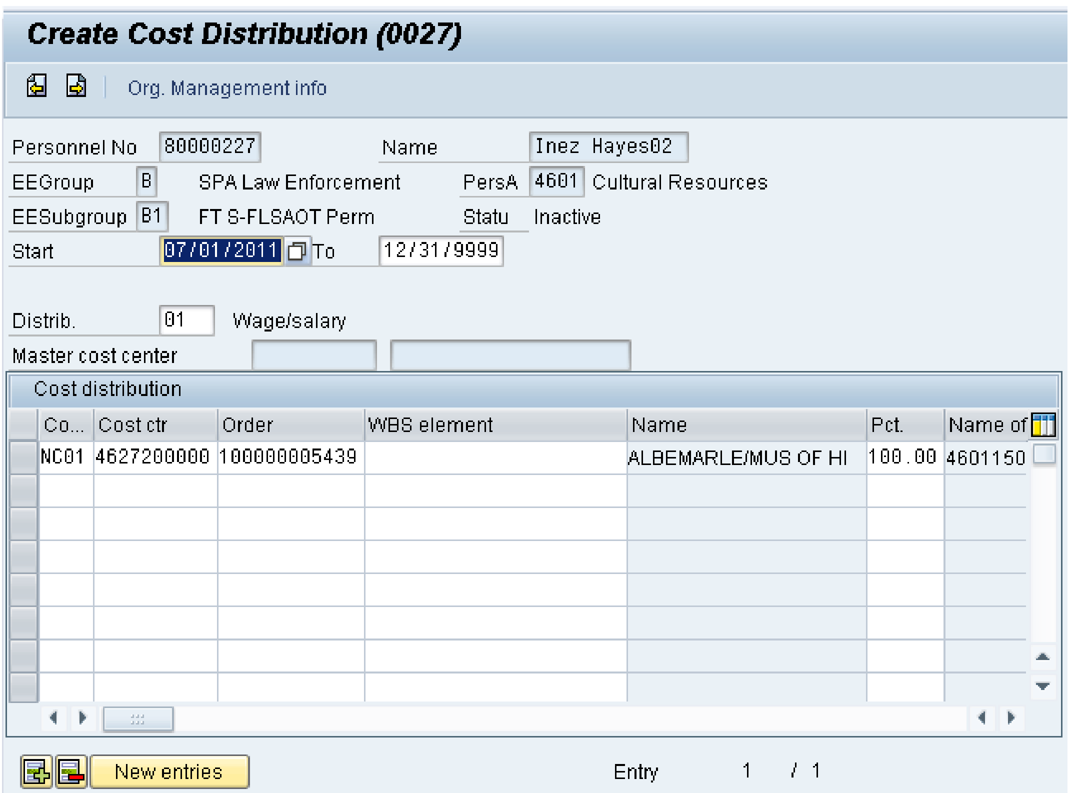


47. Click the **Enter** button.

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



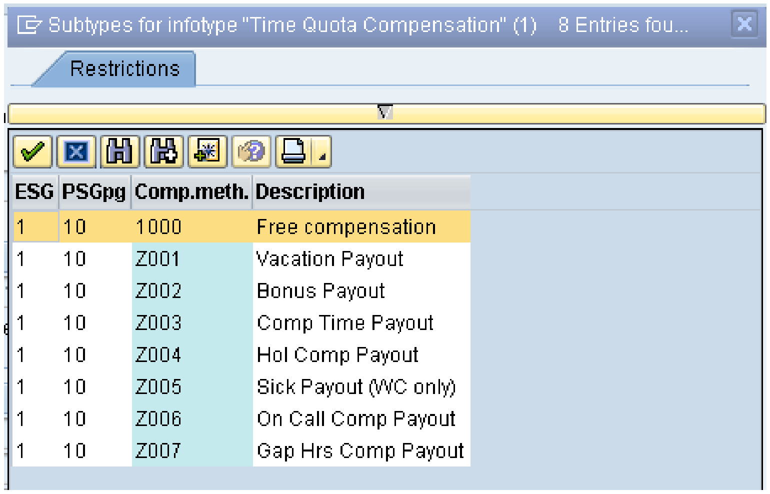
The system will provide an information message asking you to verify last day worked. Click Enter once verified.



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

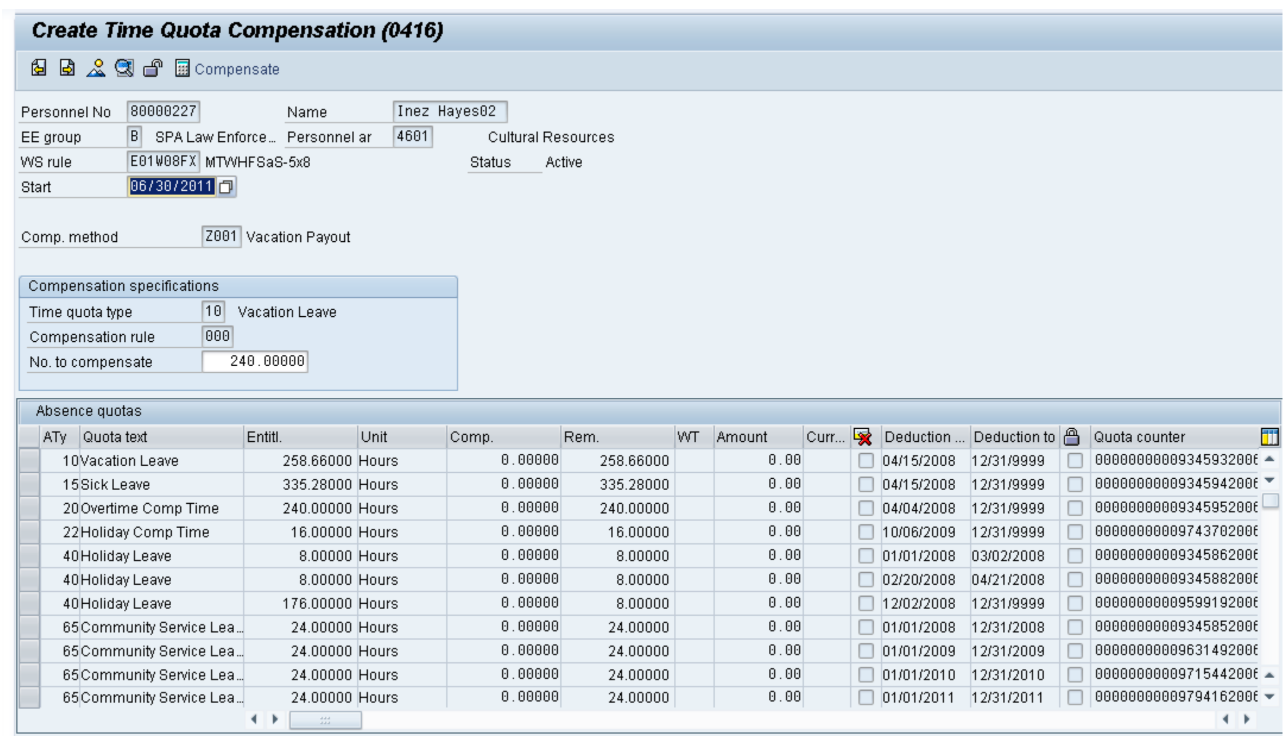
    This information is copied from IT1018 automatically. No entry is required here. This information is required for Payroll to have the necessary information if they need to generate a check after the employee has separated.

CRITICAL!	Even though the system defaults the entry from IT1018, it is critical that you save the infotype again.



49. Select the **Vacation Payout** code in the list box.

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



51. Update the following field:

Field Name	Description	Values
No. to compensate	The number of hours to compensate.	Enter value in No. to compensate. **Example**: 240

52. Click the **Enter** button.

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

    The system will show you the number of hours per quota type available for compensation. Enter the total number of hours to be paid out for the quota type chosen here.

    NOTES:

    You will need to change the date to the effective date of separation, otherwise the system will not pay out the vacation since the person is no longer active.

    Time evaluation is run nightly, so the balances should be current each day.

    The balances are current based on the time the Time Supervisor has approved.

Additional Resources

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

Change Record

Change Date: 1/20/21 – Changed by B. Johnson
Changes: IT0000 Date Change