



CHANGE WORK SCHEDULE

TM-58 | TRANSACTION PA 61

TM

The purpose of this Business Process Procedure is to explain how to change an individual's work schedule in the Integrated HR-Payroll System.

Trigger: You need to change the work schedule for an individual. The work schedule is changed on a person's record and can be processed via transaction code [PA61] (these instructions) or via transaction code [PA30].

These instructions do not walk you through entering a substitute work schedule for an individual, only changing the work schedule permanently.

Business Process Procedure Overview

Work Schedules

The work schedule is required for all employee records and

- Defines the expected daily work hours,
- Defines the number of expected workdays used to determine when an employee will accrue leave in that month,
- Is used to constrain leave usage,
- Does not limit work hours,
- Will drive Shift Premiums for eligible employees, and
- Is tied to a Holiday Calendar.

An employee can see their work schedule assignment on the upper right-hand corner of the Time Statement.

If at all possible, change work schedules on the first day of an overtime period (7 days, 28 days, etc. - this is not necessarily the payroll period), so the entire overtime period contains the same work schedule. This will prevent the payroll process from changing calculation rules within an overtime period. If it is not possible to wait until the next overtime period to change the work schedule rule (such as with promotions, LOA w/pay, etc.) it is ok to change the work schedule within an overtime period, but payroll will no longer be calculated on a period-basis. It will calculate on a daily basis, prorated based on the date of the work schedule change. The calculation in the system will be correct but may be slightly different than if the work schedule was not changed within the period, due to the calculations being daily instead of for a period.

A work schedule has been made to fit various schedules: Days, Evenings, Nights, Rotating Flex Schedules

D 01 N 08 GN

- D = Days
- 01 = Schedule number
- N = No weekends
- 08 = Hours per day
- GN = General Schedule (common schedule)

Evening Schedule: E01N08GN

Night Schedule: N01N08GN

- The first character in the work schedule defines the premium eligibility. Agencies have decided which shifts are Day, Evening, and Night.
- The last 2 characters may also represent
 - FX = Flex where the hours are set but the days are flexible
 - M, T, W, H, F = to show which day is the scheduled off day
 - 01-99 = used to represent versions of a work schedule

This is meant to make some sense of the hundreds of work schedules in Integrated HR-Payroll System. The syntax may be imperfect at times as work schedules are very complex.

Employees assigned to a night shift will earn night premium for hours recorded on their SCHEDULED workdays. NOTE: Time worked on NON-SCHEDULED workdays require a substitution or a push code.

Rotating Schedules - Common in 24x7 operations

Flex Schedules

- Allow employees to record any number of work hours or leave hours on any day of the week
- May be a 4, 8, 9, 10, or 24-hour flex schedule
- Should be used with caution

Employees on Rotating schedules must be assigned with care. In addition to identifying the rotation schedule to which they belong, it must also be determined where they are within that rotation to match up work days/off days.

Anyone with a regular recurring work pattern should be assigned to a specific work schedule that reflects the normal expected work hours per day per OSHR. Flex schedules may invite some work hour flexibility that may benefit the employee but impede business operations.

Not all schedules are permitted by all agencies.

Tips and Tricks:

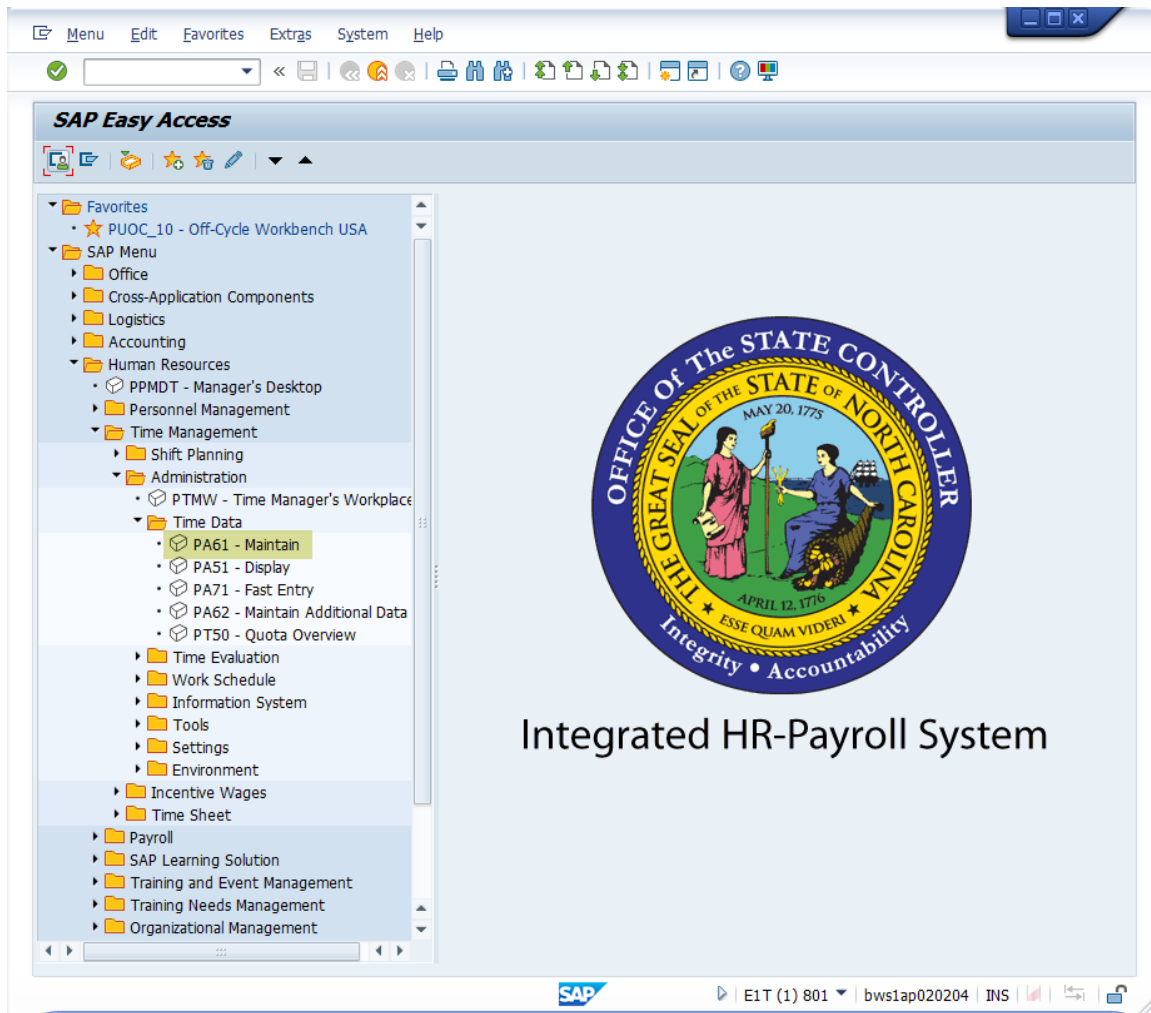
- You can access infotype 0007 Planned Working Time via transaction code [PA30] or transaction code [PA61]; both update the records on an individual.
- This process should not be used to create a work schedule substitution, only a change of work schedule permanently.

Access Transaction:

Via Menu Path: SAP menu ==> Human Resources ==> Time Management ==> Administration ==> Time Data ==> PA61- Maintain

Via Transaction Code: PA61

Procedure:



1. Update the following **required** and **optional** fields:

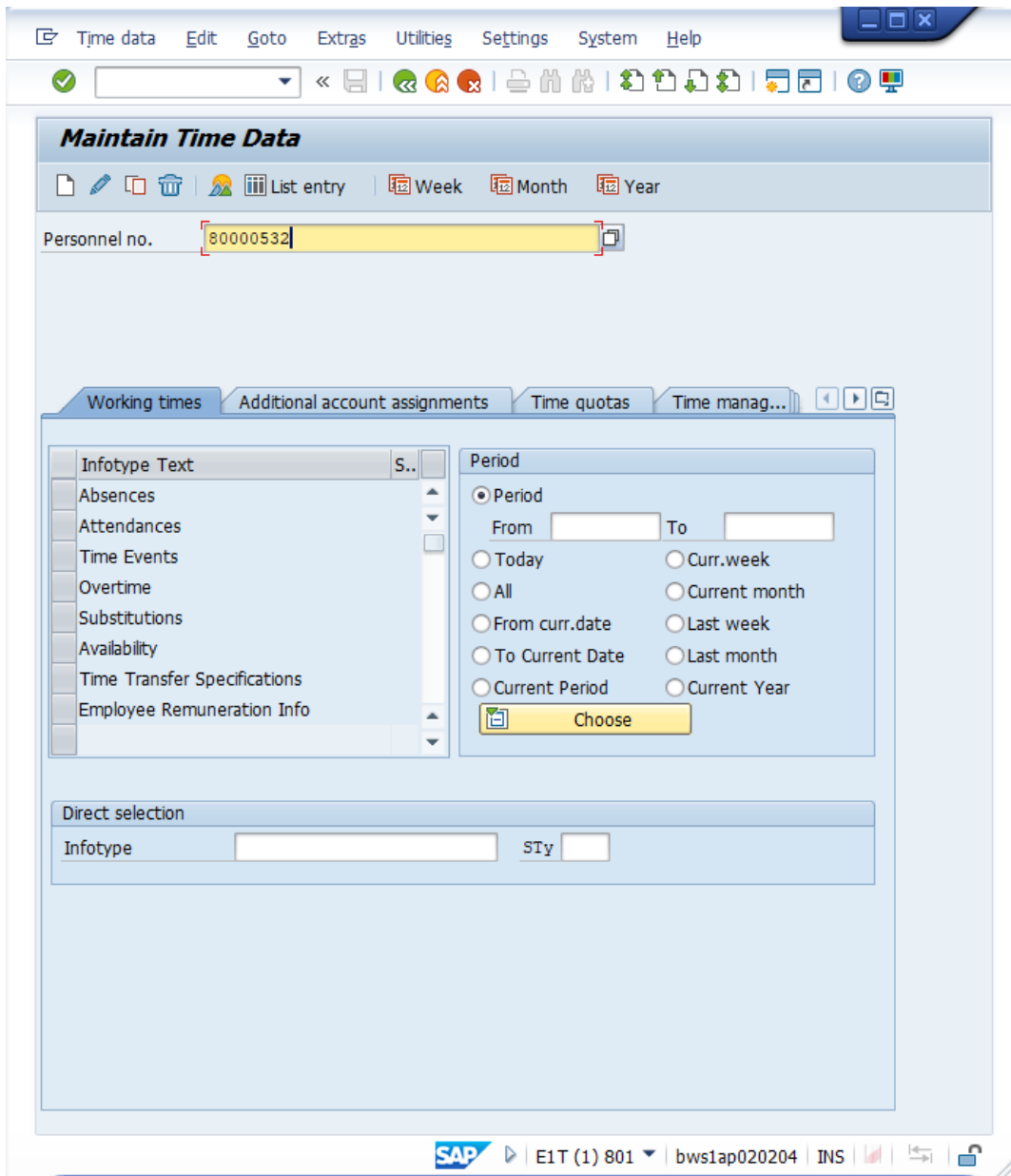
Field Name	Description	R/O/C	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	R	Enter value in Command. Example: PA61

2. Click **Enter**  button.



Information: You may want to enter this transaction code in your Favorites folder. Choose Favorites ==> Insert Favorites, and type in PA61, then click Enter.

To see the transaction code displayed in front of the link in your favorites, choose Edit ==> Settings, put a check next to Display Technical Name, and click Enter.



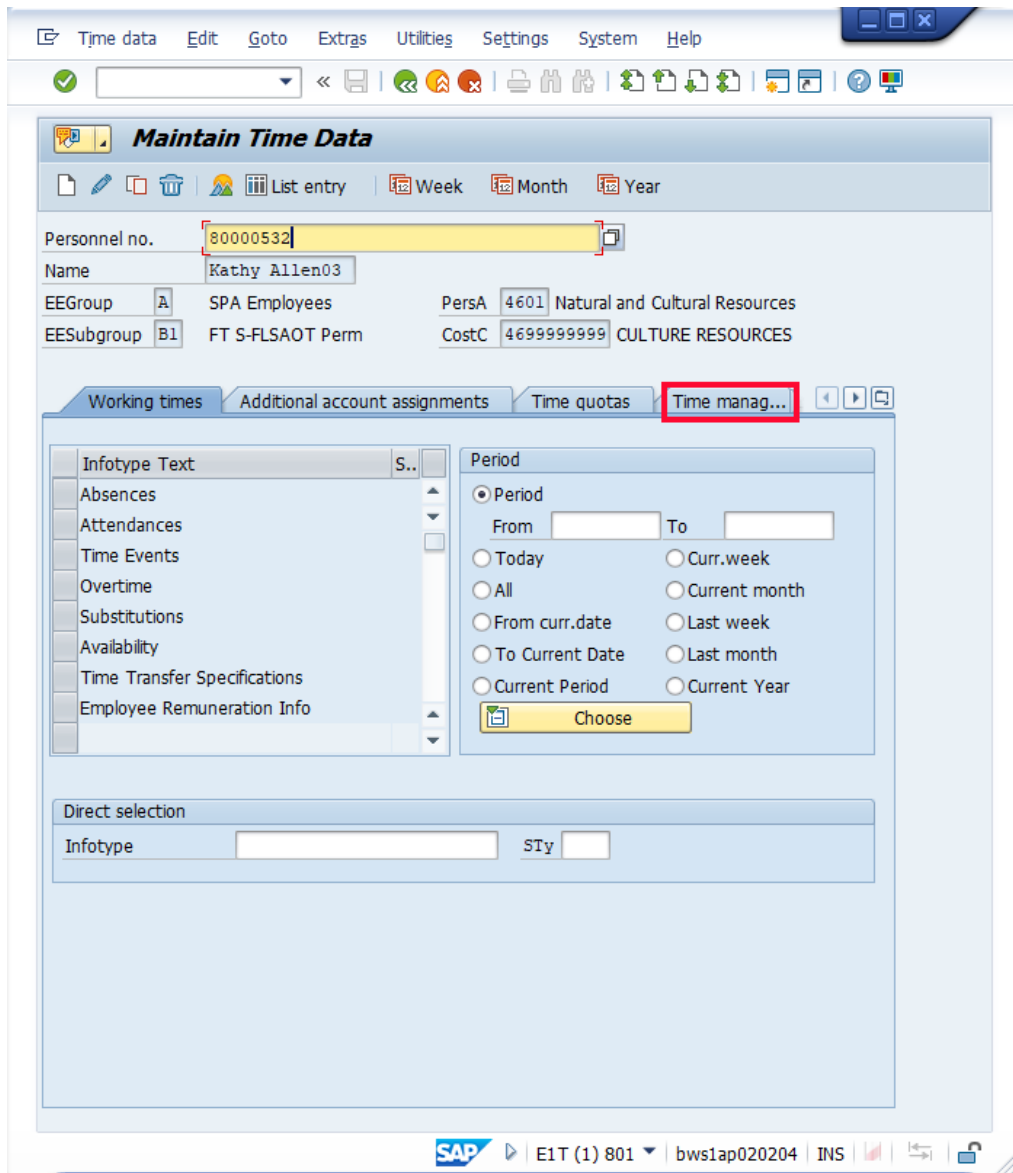
3. Update the following **required** and **optional** fields:

Field Name	Description	R/O/C	Values
Personnel no.	Unique employee identifier	R	Enter value in Personnel no. Example: 80000532

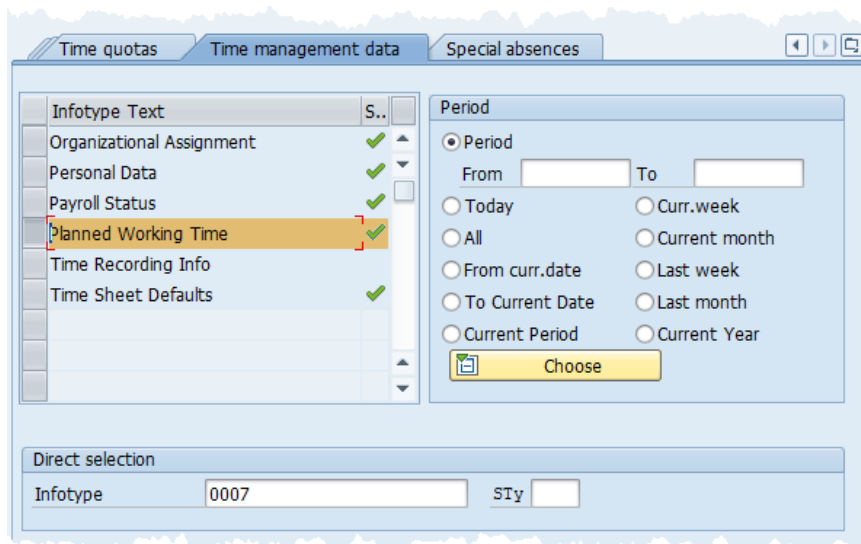
4. Click **Enter**  button.



Information: Best practice is to enter any data as appropriate, review all data, and click **Enter** to allow the system to validate the data. Verify you are working with the correct personnel number before proceeding.



5. Click on the **Time management data** tab.

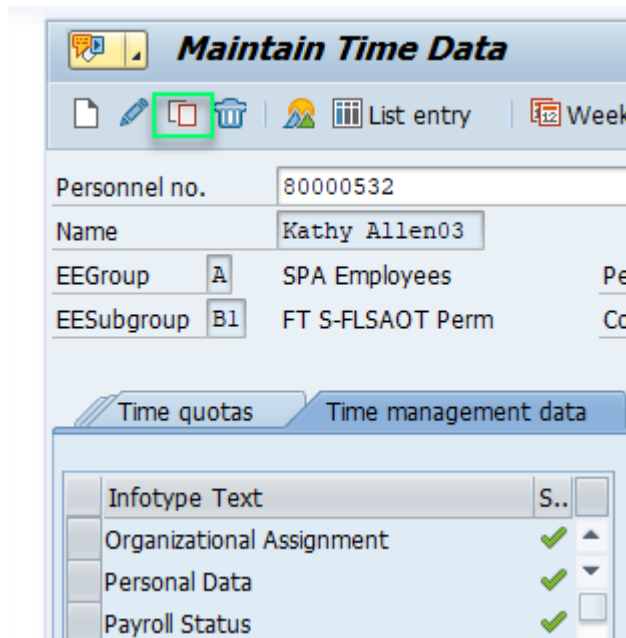


- Select the **Planned Working Time** row.



Information: You can find the **Planned Working Time** infotype on the Time Management Data tab, or you may enter [0007] in the Infotype field at the bottom of the screen and click **Enter**.

- Click **Enter** button.



- Click **Copy (Shift+F9)** button.



Information: Always use **Copy** to keep a record of the historical work schedules. If you use the **Change** function, the record of what the work schedule used to be is not saved.

9. Update the following **required** and **optional** fields:

Field Name	Description	R/O/C	Values
Start	Beginning date of the specified date range	R	Enter value in Start. Example: 05/31/2020

10. Identify the **work schedule rule** to be implemented.



Information: The match code will present a long list of available work schedules. OSC recommends using the [Work Schedules Job Aid](#) to find the appropriate schedule key. Once identified, copy into your clipboard and paste directly into the Work Schedule Rule field.



Information: You should change the work schedule at the beginning of an overtime period (7-day, 28 day, etc.) if at all possible.

Copy Planned Working Time

Work schedule

Personnel No: 80000532 Name: Kathy Allen03
 EEGroup: A SPA Employees PersA: 4601 Natural and Cultural Resources
 EESubgroup: B1 FT S-FLSAOT Perm Statu: Active
 Start: 05/31/2020 To: 12/31/9999

Work schedule rule

Work schedule rule: D02N10_F MTWHF-8,SaS-O WSR Finder
 Time Mgmt status: 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	

Attention: Please check Basic Pay info... SAP E1T (1) 801 bws1ap020204 INS

11. Click **Enter** button.

Error! Reference source not found. **Information:** You can ignore the yellow caution message about the Basic Pay record when you make this change.

Copy Planned Working Time

Work schedule

Personnel No: 80000532 Name: Kathy Allen03

EEGroup: A SPA Employees PersA: 4601 Natural and Cultural Resources

EESubgroup: B1 FT S-FLSAOT Perm Statu: Active

Start: 05/31/2020 To: 12/31/9999

Work schedule rule

Work schedule rule: D02N10_F MTWH-10,FSaS-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	10.00
Weekly working hours	40.00
Monthly working hrs	173.33
Annual working hours	2080.00
Weekly workdays	

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

12. Click **Enter** button.



Information: Notice the yellow confirmation message at the bottom of the screen noting the previous work schedule record will be delimited or have an end date put on the record.

Copy Planned Working Time

Work schedule

Personnel No: 80000532 Name: Kathy Allen03

EEGroup: A SPA Employees PersA: 4601 Natural and Cultural Resources

EESubgroup: B1 FT S-FLSAOT Perm Statu: Active

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Work schedule rule

Work schedule rule: D02N10_F MTWH-10,FSaS-O WSR Finder

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Monthly working hrs	173.33
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Weekly workdays	

Save your entries SAP

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



Information: After verifying all data is correct, click **Save**.

Possible subsequent activities

Possible subsequent activities

Enrolled on: 05/31/2020

Terminated on: 05/30/2020

Automatic Plans

Default Plans

All plans

Add. functions: 06/26/2020

Plan overview

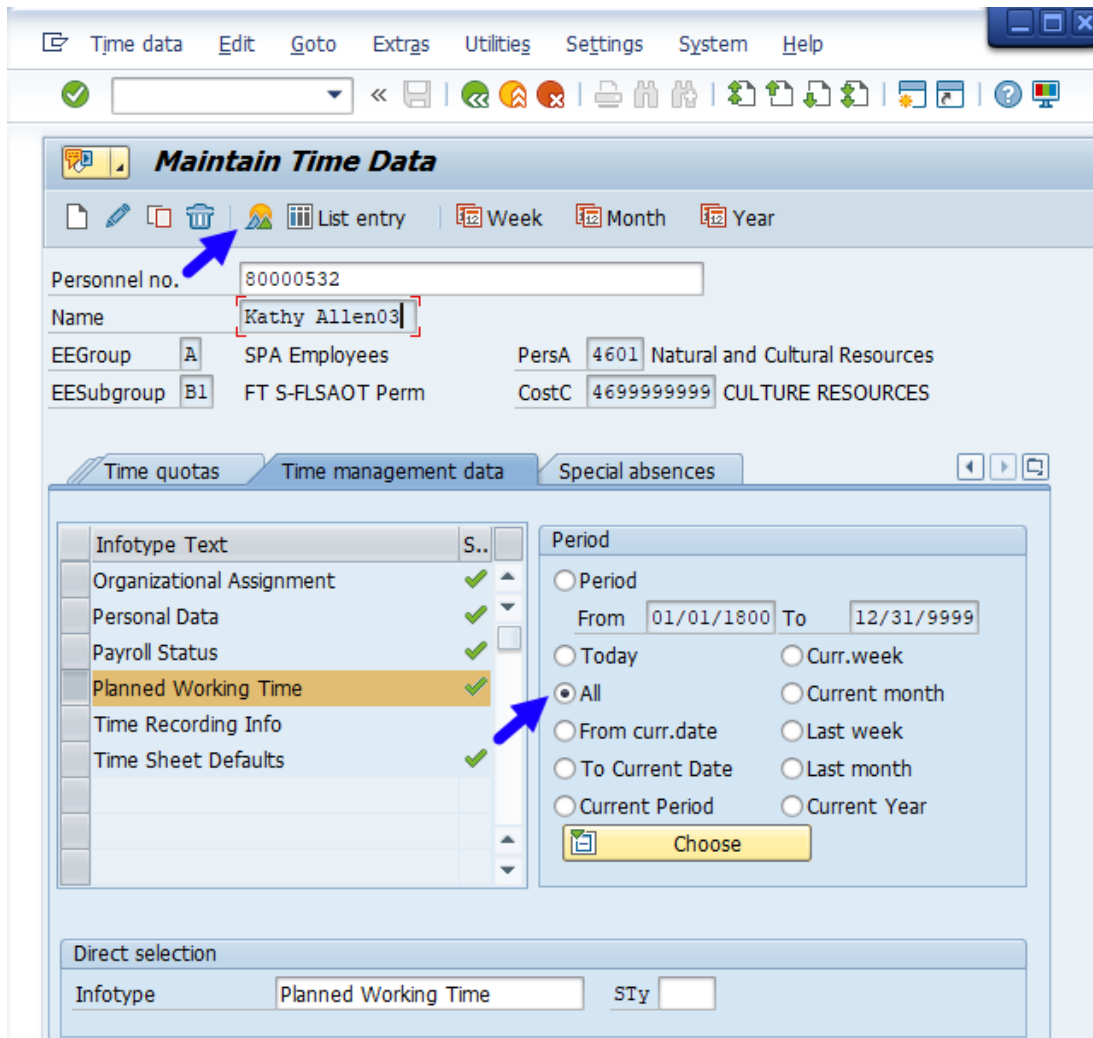
Enrollment Form


Particip. Monitor

14. **Error! Reference source not found.** Click **Cancel (F12)**  button.



Information: Since a change in work schedule has the potential to affect the benefits of the individual, the system prompts you with a benefits change option. If you need to change benefits, click **Cancel**. If you need to change benefits with the change in a work schedule, those instructions are not handled in this BPP. Several Benefits specific Job Aids and BPPs can be [found here](#).



15. Click **All** radio button.
16. Click **Overview (Shift+F8)**  button.




Information: To review the changes you have made now or in the future, choose **All** for the date range (the default is today's date, which may not show you records in the past), and click **Overview** to see the history of all work schedules on this individual's record.

Start Date	End Date	WS rule	T	Empl.	MoHrs	Wk.hrs	Hrs/Da	Wk...	P	LI	AI
05/31/2020	12/31/9999	D02N10_F	1	100.00	173.33	40.00	10.00	0.00			
01/01/2008	05/30/2020	D01N08GN	1	100.00	173.33	40.00	8.00	0.00			

17. Click **Back (F3)** button.



Information: Notice the history of all work schedules and the valid dates are displayed. To return to the main screen, click **Back**.

18. Click **Back (F3)**  button.
19. The system task is complete.

Additional Resources

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

Change Record

Change Date: 6/23/20 – Changed by C. Ennis

Changes: Updated format, assigned reference number, and made accessible

