PA315

Maintain Employee Data

TRAINING COURSE

State of North Carolina

Office of the State Controller

updated - April 17, 2013

HR/Payroll Training

For assistance with any TRAINING needs, contact:

The OSC HR/Payroll Training Team

PHONE: (919) 707-0648

EMAIL: OSC.Training.Team@osc.nc.gov

For assistance with any HR/Payroll system/process needs, contact:

The BEST Shared Services Team

PHONE(RALEIGH AREA): (919) 707-0707

PHONE(TOLL FREE): (866) 622-3784

EMAIL: BEST@osc.nc.gov

TABLE OF CONTENTS

Introduction

Overview

The course introduction is an opportunity to get to know others who are attending class as well as to agree on classroom courtesy. The instructor will inform you about the building facilities and when breaks will occur.

🗁 **NOTE:** PA is the acronym for Personnel Administration.

Pre-requisites

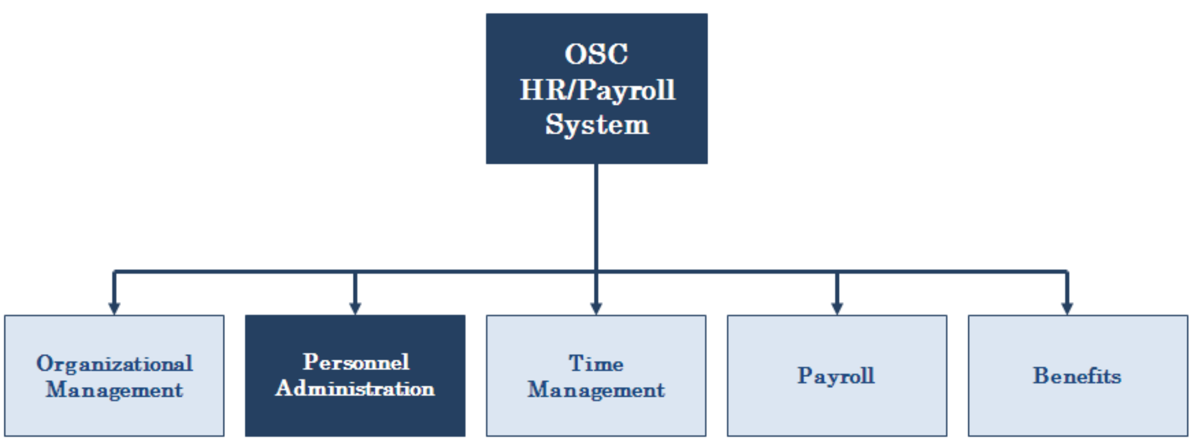
- PA200 - Personnel Administration Overview
- PA210 - Personnel Administration Terms, Concepts, and Display Data

There are two prerequisites that you must take before attending this course. Attending these prerequisites ensures that you are adequately prepared with the new processes, concepts and terms needed for successful completion of the *PA315 Maintain Employee Data* course.

PA200 is a self-paced web course that you can take anytime.

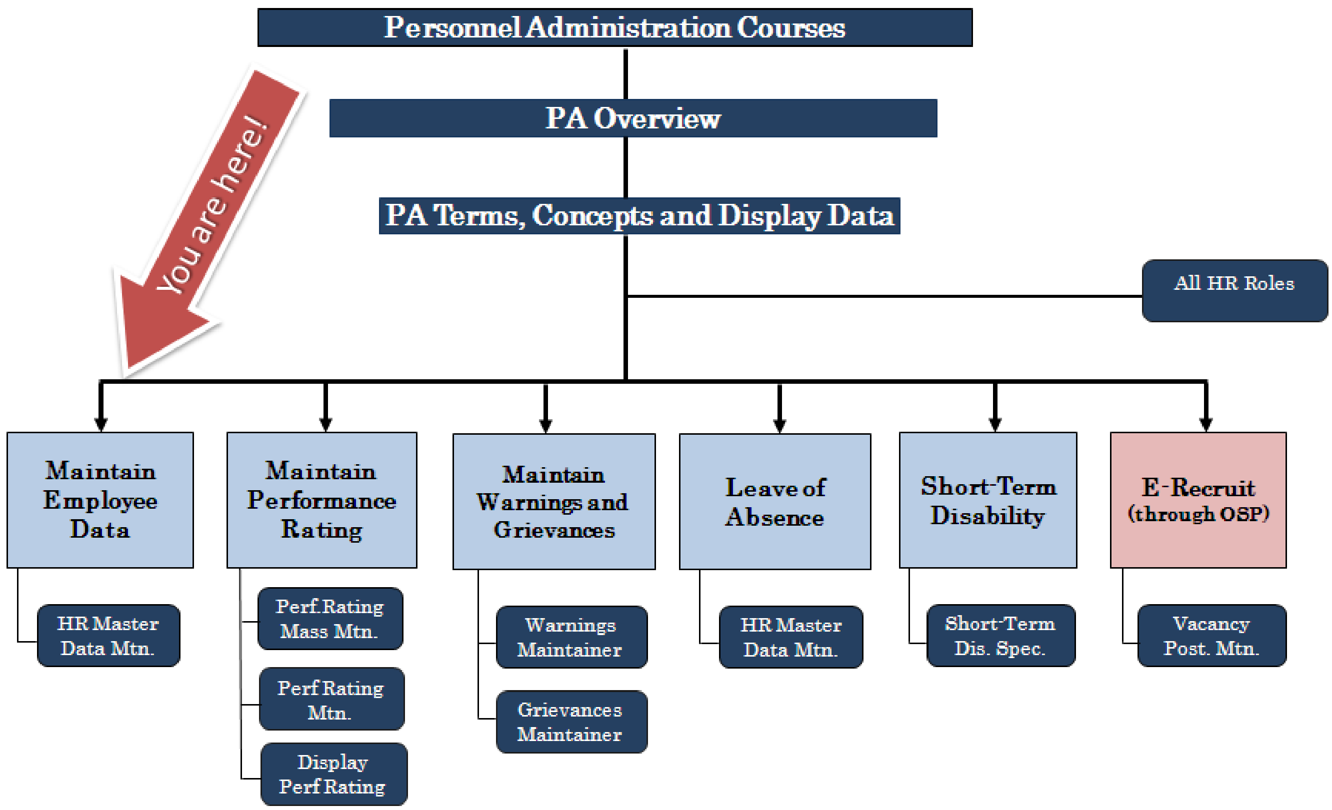
PA210 can be taken either virtually or through an instructor-led classroom.

OSC HR/Payroll Training Curriculum



The OSC HR/Payroll training program comprises several courses and different modules. Based on your HR role, you will attend courses in the *Personnel Administration* module.

OM Curriculum by Security Role



Within the Personnel Administration module, there are several courses. Your position/security roles determine which courses you may be required to attend.

Strategy for Training

Tell Me (Concepts)

- Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN

Show Me (Demonstrations)

- Instructor will demonstrate job-related tasks performed in the OSC HR/Payroll system – HANDS OFF.

Let Me (Exercises)

- Student will complete the exercises which allows for hands-on practice in class – HANDS ON

Support Me (Availability)

- Instructor will be available to answer questions while the students complete the exercises

Course Map

You can see the Course Map of the class at the beginning of each lesson. The bolded and larger text indicates which lesson you are beginning.

The lessons covered in this class include:

- Lesson 1: Personnel Administration Review
- Lesson 2: Updating Employee Data
- Lesson 3: Creating Benefits Adjustments
- Lesson 4: Connecting the OSC HR/Payroll Dots
- Lesson 5: HR Reports Overview
- Lesson 6: Course Overview

The *Maintain Employee Data* Student Guide can be used as a reference when you return to the workplace. For example, you can use the exercises for practicing in the HR/Payroll system training environment.

Course Objectives

Upon completion of this course, you should be able to:

- Recall terms and concepts from the *PA210-PA Terms, Concepts and Display Data* course
- Modify existing employee data
  - Bank Details
  - Objects on Loan
  - Communication
  - Delimit Infotypes
  - Monitoring of Task
  - Certifications
  - Addresses
  - WF (Federal and State)
  - Wage Maintenance
  - Additional Personal Data
  - Planned Working Time
- Create an adjustment reason for benefits
- Describe the relationship between PA infotypes, Payroll and Time
- Update an employee's schedule and position settings
- Identify the options to access reports

Reference Materials

- Student Guide
- Quick Reference Guides
  - PA Quick Reference Guide
  - HR/Payroll Basics Quick Reference Guide
- Business Process Procedures (BPPs)
  - Work instructions
- Job Aids

SUMMARY

This course is intended to give HR professionals an understanding of the HR/Payroll system Personnel Administration module. This course will provide you with demonstration and practice for modifying employee data.

Personnel Administration Review

Objectives

Upon completion of this lesson, you should be able to:

- Recall terms and concepts from the *PA210 - Personnel Administration Terms, Concepts, and Display Data* course.

Review PA Terms an Concepts

- Company Code
- Personnel Area / Subarea
- Miscellaneous Fields
- Employee Group / Subgroup
- Payroll Area
- Percentage
- Organizational Unit
- Job vs. Position
- Infotypes / Subtypes
- Validity Periods

Company Code

A Company Code is an HR integration point with SAP financial accounting applications and is an integral part of an employee's HR record through the connection with Personnel Administration. The Company Code represents the highest levels of the organizational structure. The State of North Carolina uses two company codes: NC01 and NC02. All agencies, except Transportation and various diviisons/sections of the Department of Commerce DES and DWS, use NC01.

- *NC01 – State of North Carolina* - NCAS

  NC01 represents primary government agencies and component units which use NCAS (North Carolina Accounting System) as their main accounting system. Until NCAS is replaced, payroll financial postings from company code NC01 will be interfaced to NCAS.

- *NC02 – State of North Carolina* - DOT / Commerce DES and DWS

  NC02 represents any primary government agency or component unit that does not use NCAS as its primary accounting system but is included in the HR/Payroll system for processing payroll transactions. These agencies or component units have their own accounting system and chart of accounts, and require payroll entries to be interfaced to their accounting systems.

The company code allows for independent accounting. Multiple company codes can exist.

Personnel Area

The Personnel Area is used by Payroll to identify the specific agency or department for whom the employee works. Personnel areas determine where wages and salaries are posted to and from where they are paid. The Personnel Area derives its 4-digit code from the *Business Area* field number, dropping the last digit and replacing it with a one. In the above example, the Personnel Area # 4601 is the same as the Business Area 4600 when you drop the last zero and replace it with a one. Some Personnel Area examples are:

- Company Code NC01
  - 1401 State Controller
  - 1601 Environmental and Natural Sciences
  - Z101 State Personnel
  - 8701 School of Science and Math

- Company Code NC02
  - 1501 Transportation
  - 4305 Commerce DES and DWS

Personnel Sub-Area

The Personnel Subarea further defines the Personnel Area. The Personnel Subarea is identified by a four alpha-numeric code and has been designed to identify various holiday calendars so that Time Management can define groups of specific time entry rules (for example, temps).

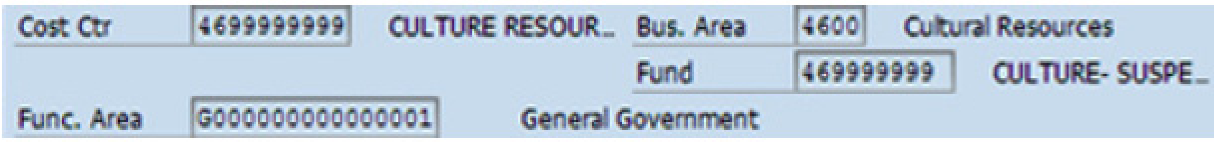
Personnel subarea groups similar jobs to conform to time and attendance rules. There are five key elements that determine an employee's Personnel Subarea assignment:

- Calendar assignment
- Relationship to the state (regular vs. temp vs. elected vs. contractor)
- Quota accrual rules/requirements
- Work schedule rule (to restrict the available work schedules)
- Working period (which defines Overtime period)

See the *Personnel Area and Subarea (PSA)* Job Aid for detailed information concerning the relevant PSAs associated with each Personnel Area.

> Follow your instructor as he/she takes you to the Training HELP page to view the *Personnel Area and Subarea (PSA)* Job Aid that is available online to assist you. The website address is:
> http://www.osc.nc.gov/training/osctd/help/index.html

Miscellaneous Fields



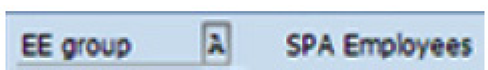
The **Cost Center, Fund,** and **Functional Area** fields default from the Organizational Unit and therefore are grayed out. There is only one Functional Area for the whole *state*. There is only one default Cost Center and one default Fund per *agency*. Neither the Fund nor the Functional Area are associated with the position.

A **Business Area** is a unit within a company code used by Finance. The Business Area is the lowest level at which a complete set of income statements and balance sheets can be processed. The Business Area represents a separate area of operations or responsibilities within an organization. In most cases, the Business Area represents an agency. The exceptions are:

- Justice (SBI)
- HHS (403-b)

The fields discussed above are populated and grayed out (and therefore cannot be changed) on the Personnel Administration screens.

Employee Group



In addition to identifying the employment status and the employee's relationship to the State, the **Employee Group** also establishes business rules for calculating leave and personnel calculation rules for managing employee pay. This also provides for benefit eligibility determination in concert with further use in alternative reporting combinations. The table below illustrates just a few examples of the State of North Carolina Employee Groups:

- **A** – SPA Employee (subject to State Personnel Act)
- **B** – SPA Law Enforcement (subject to State Personnel Act)
- **K** – EPA Employees (exempt from State Personnel Act)
- **O** – Supplemental Staff (temporaries, National Guard, contractor, etc).

The Employee Groups and Subgroups were created primarily for grouping employees according to specific Time, Payroll and Benefits rules and are also required for HR reporting purposes.

Employee Subgroup

The EE Subgroup defines whether the employe is subject or not to the Fair Labor Standards Act (FLSA) overtime, and full-time/part-time status. It is also used to determine other types of Personnel Calculation Rules specific to the combination of groups and sub-groups. The employee subgroup for the Personnel Calculation Rule allows payroll to define different payroll procedures for different employee subgroups. Some examples are:

- **A1** FTN-FLSAOT Perm [Full Time Not (subject to) – FLSA Overtime – Permanent]
- **B1** FTS-FLSAOT Perm [Full time Subject (to) – FLSA Overtime – Permanent]
- **Y8** PTS-FLSAOT Trne [Part-time Subject (to) – FLSA Overtime –Trainee]

There are many combinations of Employee Groups and Subgroups in the HR/Payroll system. If the incorrect Employee Group and Subgroup are entered, it impacts time, work against, dual employment,benefits, and pay. As discussed in PA200, you can continue to see why accuracy is so critical when data is entered.

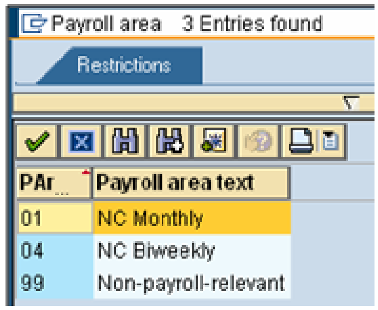
Additional Resource
You can find several additional support materials about the various groups and subgroup combinations on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/index.html Follow the following path to access the latest version of the job aids: *Personnel Administration > Job Aids* • Personnel Area Subarea • Employee Groups and Subgroups

Payroll Area

The **Payroll Area** is derived from a combination of personnel area, personnel subarea, employee group and employee subgroup. The payroll area determines payroll cycle.

- Describes the pay frequency and payroll cycle for each employee
- Defaults based on personnel area, personnel subarea, employee group, and employee subgroup
- Examples – Monthly, Biweekly
- Used as a selection to execute the OSC HR/Payroll system payroll.

- Determines pay period, start date, end date, pay date and payroll frequency.



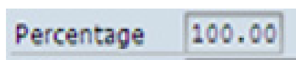
Each employee is assigned a payroll area.

Payroll accounting is performed for each payroll area.

The system uses payroll areas to group together employees from whom payroll is run at the same time, and also to set the dates for the payroll period.

All temporary positions are in the biweekly cycle!

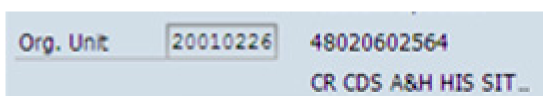
Percentage



The **Percentage** will always be 100% and identifies that the employee is working 100% of what he or she was offered and accepted. This is a required field in the HR/Payroll system.

For example, if an employee accepted a full time position at $48,000, that employee's percentage will be 100%. By the same token, if a position is going to be shared, with two employees each working 20 hours at $20,000, each of those employee's percentage will also be 100% (because each employee is working 100% of what was offered and accepted, which is a 20-hour work week at $20k).

Organizational Unit



An **Organizational** (Org) **Unit** is an entity within the organizational structure. An Org Unit can be the State of North Carolina, agencies/departments, divisions, sections, branches, work groups, or units throughout the organization.

Positions and the people who hold positions are assigned to an Organizational Unit. An Org Unit can have subordinate Org Units reporting to it, or it can be a subordinate that reports to another Org Unit.

An entity within the organization

Example:

--> Dept of Cultural Resources (*Agency/Department*)

--> Archives & History Office (*Division*)

--> Historical Resources (*Section*)

--> State Archives & Records Section (*Branch*)

Job versus Position

JOB	POSITION
Defines general classification of functions and duties that are identical across the State	Represents specific tasks performed by a person
Has a one to many ratio to positions	Has a many-to-one ratio to jobs
Defines EEO, Job Group and Census Codes	Belongs to an organizational unit
Is not held by a person (employee)	Inherits attributes from the job and org unit
Is the basis for creating positions	Held by a person
Developed by the Office of State Personnel (OSP)	May be classified as Chief position
Is the official title	Is the working title
Maintained by BEST Shared Services	Is maintained by the agency and BEST HR
	Is developed by management

A **job** is the foundation from which positions are created. A job is a general *classification* of duties and attributes. Typical attributes are: function, job family, FLSA status and role. One job can be used to create many positions. A job is identified by a unique number. When you hear the term *class* or *classification* you immediately know that a job is being referenced. Of course, the converse is also true—when you hear job, you know it is a *class*.

A **position** inherits the general classification of duties and attributes from the job. However, additional specific tasks and duties are added to the position. Many positions can be created from only one job. Each position has its own unique number as an identifier.

In the HR/Payroll system, you can see both the job (class) and the position title for an employee.

In the following example, there may be several different types of Office Assistant (OA) positions in the organization. Each OA position has its own specific tasks and duties; however, some general information is common to all OA positions. For example, the EEO, Job Group, Census Code and some tasks are applicable to all OA positions. This general information is created in the job and then used as a template to create the various OA positions. The specific information pertinent to each OA position is then added at the position level.

Job – Office Assistant

Positions:

- Human Resources Assistant
- Accounting Assistant
- Inventory Assistant

Example:

An example of a Job (class) and its related positions is engineering. There may be several different types of engineers in the organization. Each engineer position has its own specific tasks and duties; however, some general information is common to all engineer positions. That general information is created in the job and then used as a template to create the various engineer positions. The specific information pertinent to each engineer position is then added at the position level.

The relationship between jobs and positions is the same in both graded and banded jobs and positions.

OFFICIAL JOB (CLASS) TITLE	POSITION (WORKING) TITLE
Engineer (Graded)	• Water Quality Engineer • Air Quality Engineer • Building Systems Engineer • County Maintenance Engineer • Elevator Engineer • Environmental Engineer
Networking Specialist (Banded)	• Network Tech • WAN Specialist • IT Manager

Position (S)

A Position:

- Belongs to an org unit (O)
- Is described by a job (C)
- Can represent a set of tasks performed by a person
- May be classified as Chief position
- May be vacant or occupied by persons (employees)
- Can be occupied by 1 or more persons (P)
- Number can begin with 60, 62 or 65
  - 60 - transferred in at Go-Live
  - 62 - new positions created in mass
  - 65 - created since Go-Live

The SAP code for a Position is "S".

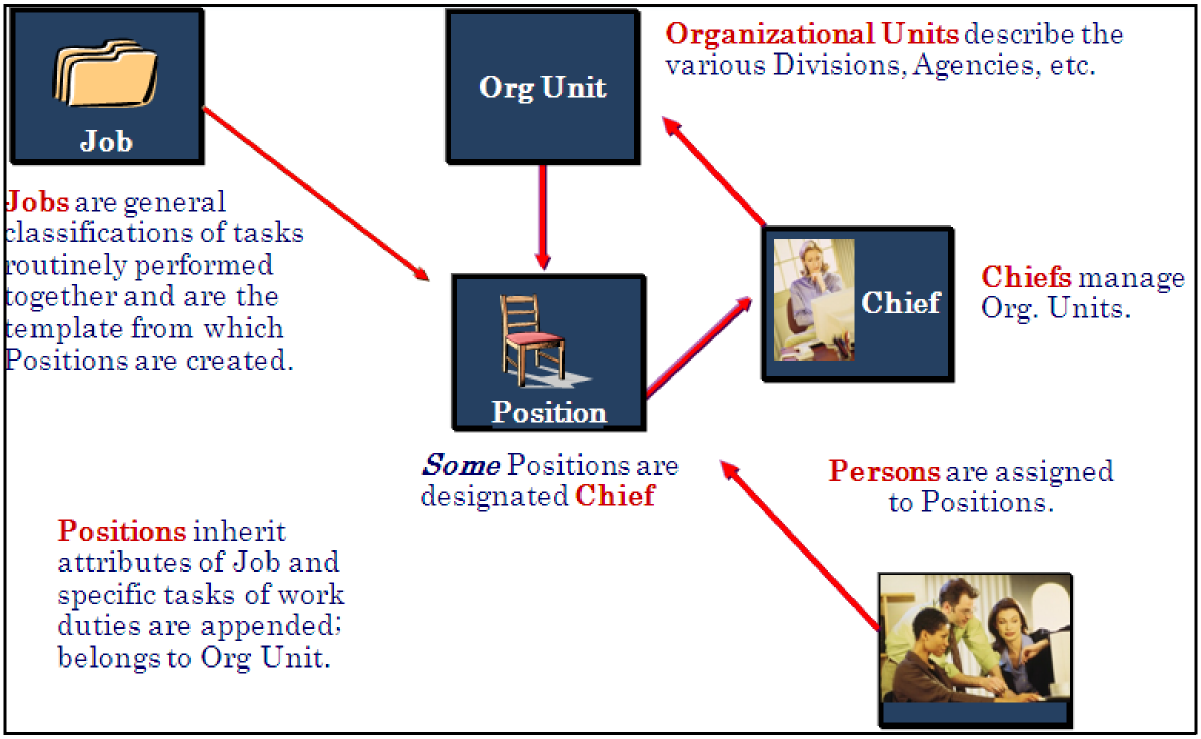
The position number is assigned sequentially by the HR/Payroll system . Therefore there is no logic to the number assignment.

The position number is eight digits long and begins with a "6".

A position is described by a job and held by 1 or more persons. In the HR/Payroll system terms, a person is a holder of a position, and is not a holder of a job. When a person is hired using the PA modules, he or she is assigned to a position that resides in an organizational unit. It is important to remember that an employee's personnel record contains the position name and number, org unit name and number, and job name and number as well as the person's name and personnel number.

Some positions are classifed as Chief positions. Any position that manages employees and/or an organizational unit is designated a Chief position. When you think of a traditional organizational chart, you know that managers usually report to an upper level manager, and the division, agency or department reports up the organization as well. The same is true for the Chief position and the organizational unit that he or she manages.

Relationship of Components



As illustrated, the Org Unit, Job, Position, and Persons are related. After the Org Unit is created, a Position is created from a Job and assigned to the Org Unit. The Position may be classified as a Chief Position if it manages an Org Unit. Persons are assigned to the various Positions.

Org units, Jobs, and Positions are maintained in the Organizational Management modules which are not part of Personnel Administration. However, it is necessary that you have a general understanding of how the components are related.

HR Master Data

The OSC HR/Payroll system stores employee data, called **Master Data**, in a central database that can be shared across all the OSC HR/Payroll system modules. Master Data contains the following employee information:

- Personal
- Position
- Organizational related information and includes all of the data required for processing benefits, time, and payroll.

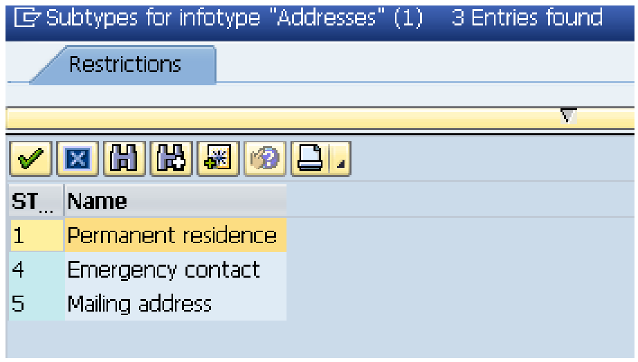
Master Data represents individual entries such as employee name, address, and basic pay.

Generally, Master Data is information that remains the same over a long period of time. Since the OSC HR/Payroll system is integrated with other modules, those modules can use HR Master Data as applicable. This eliminates duplicate data entry. Likewise, Human Resources (HR) can use Master Data associated with other modules.

Infotypes

Employee master data is organized into **infotypes**. Infotypes are used to group related data fields together to form units of information in the HR module. Infotypes form the basis of the actions and sequencing that allow for easier and faster data entry and updates. **Infotype** is the term SAP uses to identify the screens that make up an employee's personnel file. Just as you would have individual pieces of paper in a file folder to comprise a manual personnel record, you now have electronic infotypes to comprise a personnel record. Just think of an infotype as a screen of information.

Subtypes



A **subtype** is an expansion of an infotype that holds additional screens of information. For example, the State of North Carolina records not only an employee's permanent address, but the mailing address and emergency contact information as well. Therefore, the Addresses infotype (0006), contains subtypes (1, 4, 5) for those additional addresses. Only a few infotypes require subtypes.

When updating an employee's address, remember to only use LINE 1 for both the street address and any additions (i.e., apt or suite). Leave line 2 blank. Only enter a mailing address if it is different from the Permanent address.

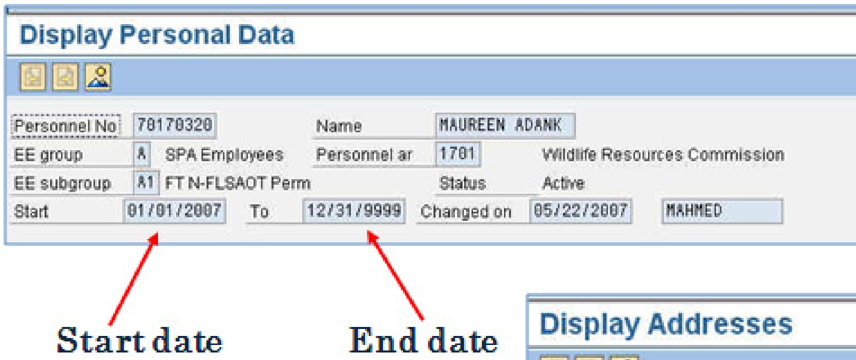
Dates

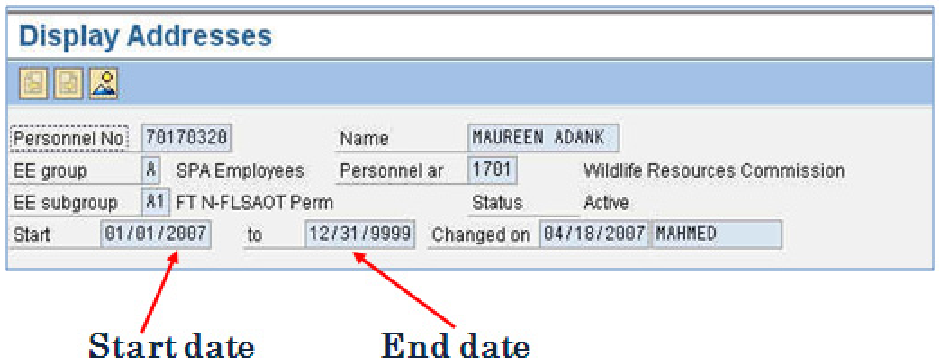
Critical in the HR/Payroll System

Every HR Action and infotype must have a start (effective) and end date. When records are created or revised you, are required to enter an effective (Start) date. The OSC HR/Payroll system Start date default is the current date. Therefore, when you are entering data, you must be especially diligent about entering the correct Start date.

The OSC HR/Payroll system automatically assigns an end date of 12/31/9999 to the new or revised data. In addition, the system assigns an end date to the previous data (if applicable) for an Action or infotype. An end date can also be manually entered by data entry personnel.

Validity Periods

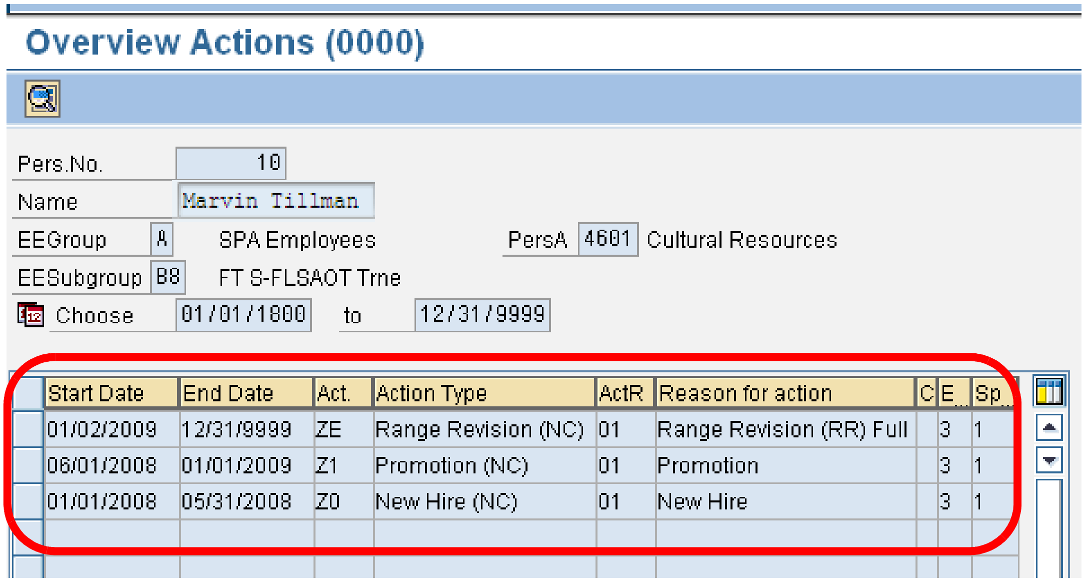




When a record is created, it must have a beginning or start date and an ending date, which is called the **validity period**. Although the data entry personnel will always know the start date of a record, he or she often will not know the end date. For example, if an employee is hired or promoted today, the end date for either of those records is unknown. To accommodate for that uncertainty, the OSC HR/ Payroll system allocates an end date of December 31, 9999 (sometimes referred to as the end of time) for all current records. When that current record ends, the OSC HR/Payroll system applies the appropriate end date.

When an infotype in an employee's HR/Payroll system personnel record is revised, the old record is not lost or overwritten (unless it is a correction entry), it just ceases to be the most current record. The old record remains in the system as part of the employee's history. Historical records will have actual start and end dates; the current record's end date is 12/31/9999. In case of a correction entry, the incorrect data is overwritten because you obviously don't need a historical record of the incorrect data.

Delimit



Overview Actions (0000)

Pers.No. 10
Name Marvin Tillman
EEGroup A SPA Employees PersA 4601 Cultural Resources
EESubgroup B8 FT S-FLSAOT Trne
Choose 01/01/1800 to 12/31/9999

Start Date	End Date	Act.	Action Type	ActR	Reason for action	C	E...	Sp...
01/02/2009	12/31/9999	ZE	Range Revision (NC)	01	Range Revision (RR) Full		3	1
06/01/2008	01/01/2009	Z1	Promotion (NC)	01	Promotion		3	1
01/01/2008	05/31/2008	Z0	New Hire (NC)	01	New Hire		3	1

Delimit means to put an end date on a previous record. When the new record for an infotype is created, the HR/Payroll system automatically delimits the previous record to one day prior to the new record's effective date. This preserves history. Any record with an end date other than 12/31/9999 has been delimited.

In the example illustrated above, the employee's original Action was the New Hire. When it was entered, it had an end date of 12/31/9999.

On 6/1/2008, an entry was made to promote the employee. When the effective date of 6/1/2008 was entered, the system automatically delimited the new hire record to 5/31/2008 and applied 12/31/9999 to the promotion.

In a similar manner, when a range revision was entered 1/2/2009, the HR/Payroll system delimited the promotion one day prior and made the range revision the most current record.

The HR/Payroll system is date-driven so it is essential to understand the concept of validity periods and how the system preserves history.

Actions

The life cycle of an employee comprises many different events. the HR/Payroll system defines those events as a specific infotype called **Actions (IT0000)**. Actions for the State of North Carolina are shown above.

An Action combines logically related infotypes into one infogroup. The infotypes in the infogroup are sequentially arranged and automatically display. This helps to simplify the data entry for the Action. You do not have to remember whether a particular infotype should be included—the HR/Payroll system automatically includes the infotypes that are associated with a particular Action. Depending upon the employee's specific data, you may not need to enter data on each of the infotypes presented in the Action.

All Actions are processed via ZPAA076, known as Workflow (the electronic approval process). If you need to modify an existing employee's personnel files and the modification requires Workflow, you cannot process it through the PA30 transaction.

With the Actions infotype (IT0000) you can display an overview of all the important changes related to an employee, and you can thus document the most important stages an employee passes through in his or her history with the State. Only the current data was downloaded into the HR/Payroll system.

🗁 **NOTE**: The Quick Entry Action can only be performed by BEST Shared Services.

Transaction Codes

To display personnel information you will use either transaction code **PA10** or **PA20**. With the exception of BEST Shared Services, you will only see the employees within your division or agency. In a similar manner, you will only see those infotypes which you have security to view. For example, if an employee has a grievance infotype but your security access doesn't include grievances, you will not be able to see that record for your employee.

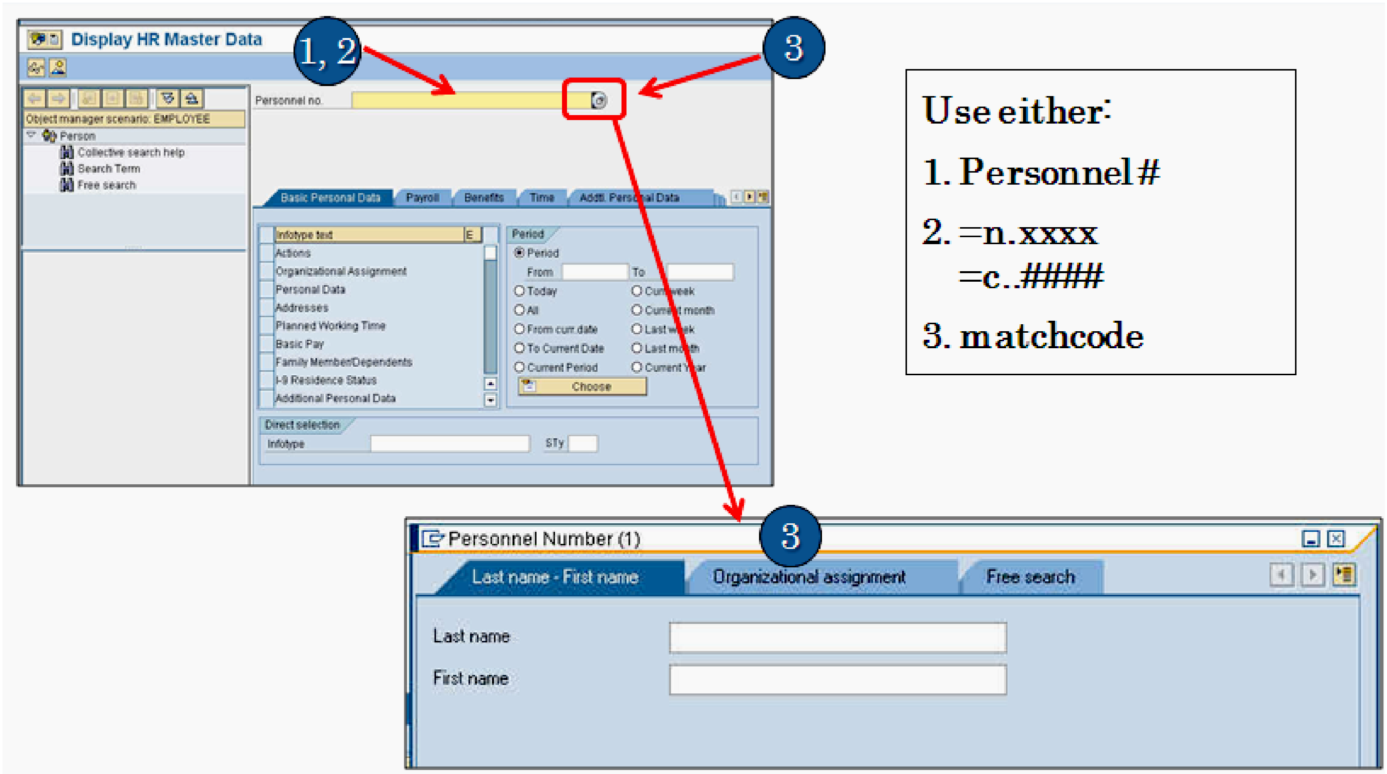
PA10 is used to display an employee's personnel record. It is equivalent to having a personnel record on several pieces of paper stapled together in logical sequence. Using PA10 is an efficient way to look at the personnel record.

PA20 is used to display individual infotypes. Using PA20 saves time when you need to look at only one or two pieces of information in a personnel file. For example, if you only need to view the employee's salary you can go directly to the Basic Pay infotype (IT0008). If you used PA10, you would have to page forward until you reached that particular infotype.

S_AHR_61015471 is a report that allows you to view specific infotypes in an employee's file. This report will only display the infotypes you specify.

🗁 **SECURITY WARNING!** Do not leave your screen open and on displaying an employee. Close the transaction as soon as you have obtained the information you needed or entered the data necessary for your process.

Finding an Employee



Finding employees

Before you can process existing or previous employee data you must access the employee's record. There are a variety of ways you can search for an employee:

1. ***Personnel Number***: Enter the Personnel Number into the Personnel no. field.

2. ***Shortcut***:

   A. Use a shortcut (**=n.xxxx**) in the Personnel No. field to search by last name.

   (**Example**: =n.hendrix - NO spaces.)

   A list of all employees with that last name displays. Double-click to select the appropriate employee.

   B. Use a shortcut (**=c..####**) in the Personnel No. field to search by SSN.

   (**Example**: =c..123456789 - NO spaces.)

3. ***Matchcode***: Use the Matchcode at the end of the Personnel No. field to search by last and first name, or by Personnel Number, or by org assignment.

Verifying the Action is appropriate

Before you initiate an Action on a current employee, it is a best practice to verify that the Action you are about to take is applicable. For example, you cannot reinstate an employee who does not have a Separation Action as the current record. Use PA20 and the Overview of the Actions infotype to verify that the Action you are about to take is appropriate.

Viewing Icons

Use any of the applicable functions to view employee records:

Display 

Overview 

Next Record 

Previous Record 

Choose (drill down) 

After you access an infotype, there are several ways you can view and navigate within the records, as illustrated above.

When you use the **Overview** function, observe that the transactions for the infotype display in a list, or summary. The most current record (with the data 12/31/9999) is at the top of the list.

* *

EXERCISE: Logging into the HR/Payroll System

SCENARIO
You need to log into the HR/Payroll system to be able to perform the exercises for this class.

Instructions

The instructor will assist you in accessing the system. Follow along as your instructor logs into the HR/Payroll system.

Activities include:

- Signing on with the User ID given to you by your instructor
- Adding the following transactions to your Favorites folder:
  - **ZPAA076**
  - **PA30**
- Change the technical settings display
  - **Extras > Settings > Display technical names**

- Adding the following URL to your Favorites folder:

  http://www.osc.nc.gov/training/osctd/help/index.html

* *

INSTRUCTOR DEMONSTRATION: PA10 - Personnel File

SCENARIO

Watch as your instructor demonstrates the following elements of an employee's personnel file in the PA10 - Personnel File transaction.

- PA10 - Personnel File transaction
- Job Aid: *PA Infotypes and Descriptions*
- Infotypes associated with the employee's personnel file
- Function buttons and how they work

Instructions

Follow along with the instructor as he/she illustrates how to use the menu path to access PA10 and search for employee Maureen Ahmed by using the matchcode and the employee's last name.

As a reminder, in this training class you have access to all infotypes. However, in your work environment, your access will be limited based on your OSC HR/Payroll HR role.

1. From the SAP Easy Access screen, use the following menu path:

   Human Resources > Personnel Management > Administration > HR Master Data > Personnel File

2. Double-click **Personnel File**.
3. Click the **Back** button to return to the SAP Easy Access screen.
4. This time, double-click the Favorites link for **PA10 - Personnel File**.
5. Click the **matchcode** button on the Personnel File screen.
6. At the *Personnel Number (1)* screen, type **Ahmed** in the Last Name field.
7. Click the **Start Search** button. A list is displayed, even if there is only one employee with the last name. Double-click the applicable employee. The employee's personnel number is populated in the Personnel No. field. You must press **Enter** in order for the employee's name to display on the screen.
8. Use the various function icons to display, move to next record, or drill into a record.
9. Click the **Back** button to return to the SAP Easy Access screen.

🗁 **NOTE:** The Start Date on the Search results list is actually the Employee's birthdate.

🗁 **NOTE:** As an alternative to using the menu code, you can enter the transaction code directly into the Command field and then press Enter.

🗁 **NOTE:** PERNR is a nickname for the **PER**sonnel **N**umbe**R**.

* *

EXERCISE 1.1: Displaying an Employee's Personnel Record

SCENARIO

Your HR manager has issued a request for an employee's personnel information. You will use the PA10 transaction to display various infotypes to find the requested information and answer the questions at the end of this exercise.

Instructions

1. Use the information you learned in the previous exercise to complete the request for information below:

Questions/Results

A. On what date was the employee hired? ______________________

B. True of False: The New Hire date is the most current record. ______________________

C. How can you defend your answer? ______________________

D. What is the employee's position number? ______________________

E. What is the employee's position title? ______________________

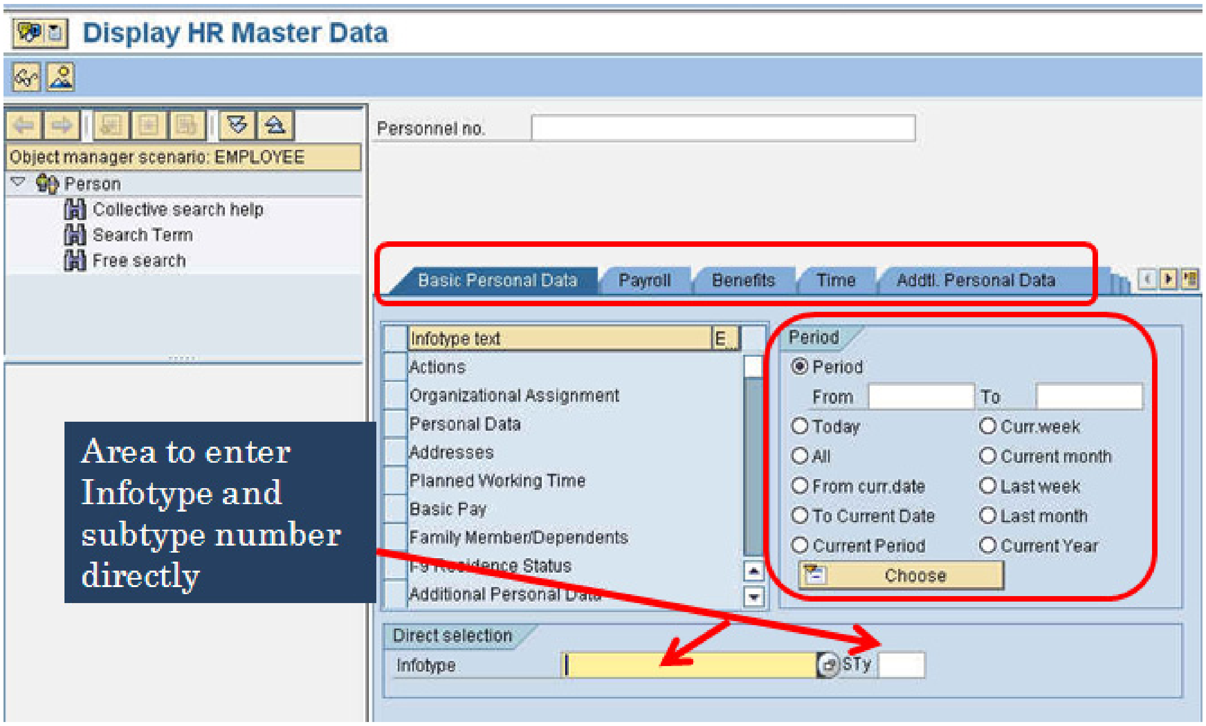
F. What is the employee's personnel number? ______________________

G. Which infotypes did you use to find this information? ______________________

2. **Stay where you are.** Do not go back to the SAP Easy Access screen.

* *

PA20 Screen Functions



When you use PA20 to access the *Display HR Master Data* screen, you can use several options to choose the individual infotypes you wish to view.

Tabs: The infotypes are grouped together by subject matter on a Tab menu. Merely select the tab you want to access, or use the Display all tabs button.

Period: You have various options regarding the time frame you wish to use when displaying an info-type. It is important when you are viewing infotypes to ensure that you have selected the appropriate time frame. If an infotype does not display, it could be because it was not valid during the time period you have selected. Some infotypes only display if the All option has been selected.

Direct Selection: You can either enter the infotype code and subtype in the *Direct Selection* field, or use the matchcode to search for the infotype by name.

The left panel (which is called the Object Manager) can be hidden from view by selecting **Settings > Hide Object Manager** on the menu.

* *

EXERCISE 1.2: Displaying an Employee's Personnel Record using PA20

SCENARIO
You need to find information for an employee (Nicole Milam). YOu will use the PA20 - Display Master Data transaction to access the employee's personnel information. You will also learn how to change from one transaction to another without going back to the SAP Easy Access screen.

Instructions

You will first learn how to change from one transaction code to another without going back to the Easy Access screen.

By using **/nxxxx** (where x represents the new transaction code), you can immediately go from one transaction to another. For example, /nPA20 immediately takes you to PA20. **Using this short cut method when you are entering data, however, does not prompt you to save your data before leaving the current screen.** You can also enter /n and then press enter to take you directly to the Easy Access screen. If you are already on the Easy Access screen, you do not need to enter /n.

In addition, you will use the =n.xxx shortcut method to find the employee.

Once again, as you move through each infotype (screen), observe the name and number of the infotype and review the fields on the individual infotypes so that you can become familiar with the various types of information on each one.

You are currently on the PA10 screen.

1. In the Command field, type **/nPA20**.
2. Press **Enter**.
3. At the *Display HR Master Data* screen, type **=n.milam** in the *Personnel No.* field.
4. Press **Enter**.
5. Follow your instructor as he/she leads you in learning how to directly access infotypes.
6. Click **Back** to return to SAP Easy Access screen when you have viewed the areas as directed by your instructor.

EXERCISE 1.3: Using PA20 to Display Infotpyes

SCENARIO

You want to view the employee's Actions information. You don't want to scroll through several pages of information to view the data you are seeking. Use the appropriate transaction code and the instructions on the previous page to view the Actions infotype.

- **Infotype**
  - — Actions
- **Transaction Code**
  - — PA20
- **Employee Name**
  - — Nicole Milam

Instructions

1. Use the information you learned in the previous exercise to complete the request for information below:

Questions/Results

A. Besides the new hire, what other Actions and reasons have been entered for the employee? ______________________

____

____

B. Was the employee's salary affected by any of the Actions? ______________________

C. If yes, what was the previous annual salary? ______________________

D. If yes, what was the previous monthly salary? ______________________

E. What is the current salary? ______________________

F. Which infotypes did you use to find this information? ______________________

2. Click **Back** to return to SAP Easy Access screen when you have viewed the areas as directed by your instructor.

SUMMARY

In this lesson you learned to recall terms and concepts from *PA210 - Personnel Administration Terms, Concepts, and Display Data* course.

Updating Employee Data

Objectives

Upon completion of this lesson, you should be able to:

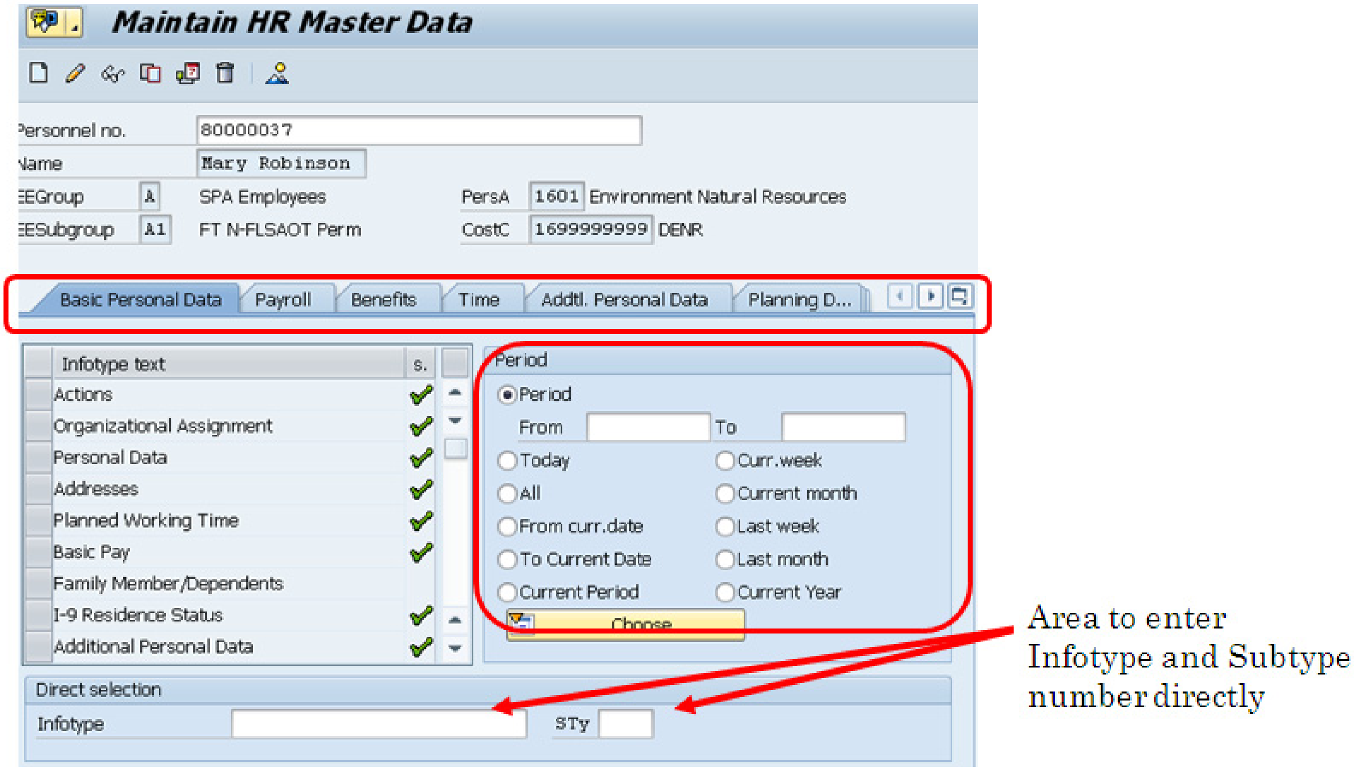
- Describe the process to maintain employee data
- Identify the transaction code used to update employee data
- Distinguish among the editing functions
- Use the OSC HR/Payroll system to maintain employee data

In this lesson, you will enter data into specific infotypes, based on the type of information that needs to be created or revised. You will determine and select the specific infotype to be revised and then make the appropriate data entry. Although Workflow is not required for maintaining employee data, you should continue to use the proper documentation that authorizes the revisions you are making, just as you have done in the past.

If you alter or add an infotype, you need to place appropriate comments on that infotype which should include:

- The date
- Your initials
- What you did
- Justification for doing what you did

PA30 - Maintain Master Data



After employees are hired, circumstances may arise that make it necessary to enter new data or revise existing data.

Use PA30 to access the *Maintain HR Master Data* screen. There are several options available, which are the same options you saw in the **PA20** - *Display Master Data* transaction. The options are:

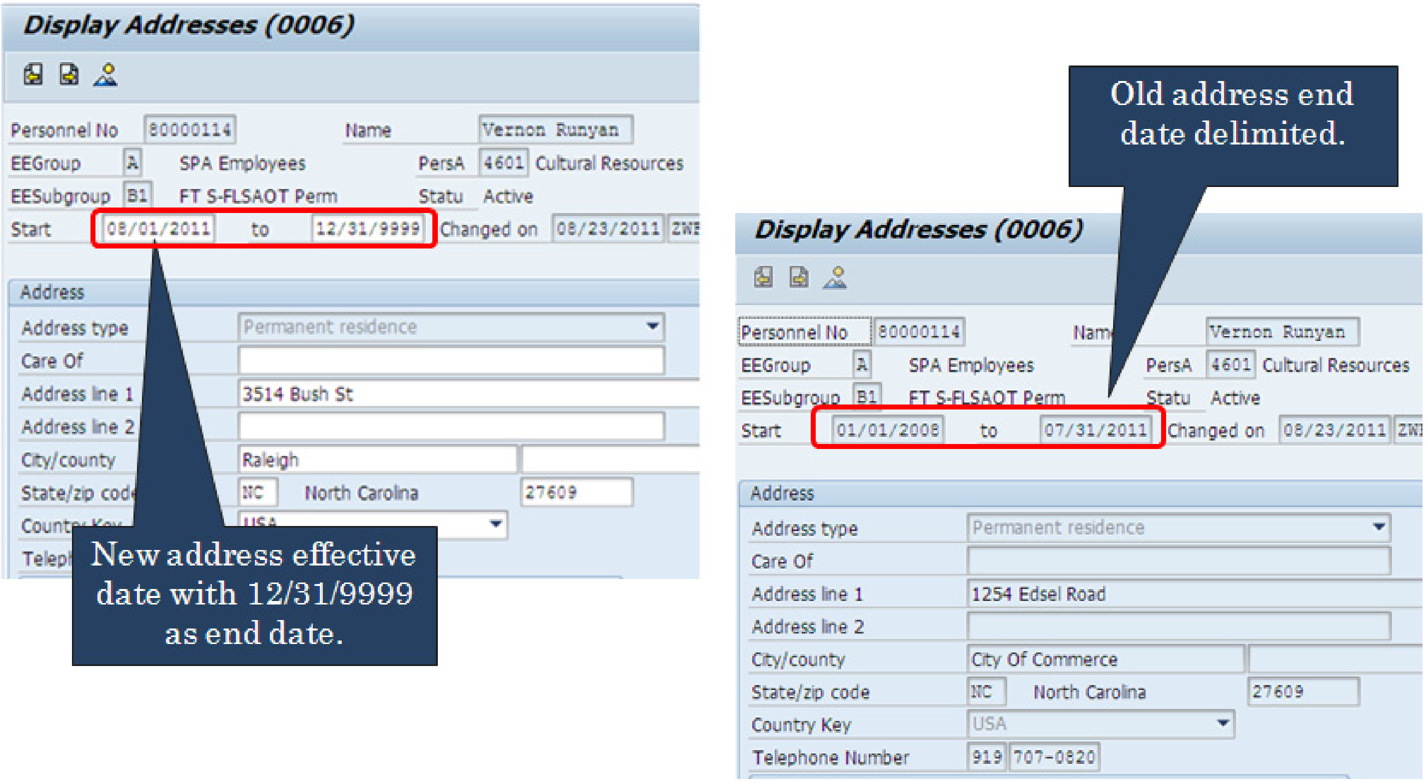
- **Tabs**: The infotypes are grouped together by subject matter on a Tab menu. Simply select the Tab you want to access, or use the display all tabs button. After you select the appropriate tab, you may have to scroll to find the specific infotype.
- **Period**: You have various options regarding the time frame you wish to use when displaying an infotype. Some infotypes will display only if the All option has been selected.
- **Direct Selection**: You can either enter the infotype code and subtype in the Direct Selection field, or use the matchcode to search for the infotype. You don't have to be on a specific tab to use the Direct Selection option.

Infotypes

Infotype Dates

Each entry must have a **Start** (beginning) date and an **ending** date. In most cases you will not enter an end date; the OSC HR/Payroll system will automatically apply the end of time for the new data. In addition, the HR/Payroll system automatically delimits the previous infotype to one day prior to the new data.

Infotypes Delimited



The preceding example was for the Actions (New Hire, Promotion) infotype. However, the same concept is true for individual infotypes as well.

In the above example, the employee moved to a new permanent address effective 8/1/2011. When the new permanent address was entered with the 8/1/2011 effective date, the HR/Payroll system automatically assigned the end date as 12/31/9999 and delimited the old permanent address as of 7/31/2011.

The employee's other addresses, emergency contact, and mailing address still have their original end dates of 12/31/9999 because no changes have been made to them. In this case, the Addresses infotype has several subtypes, all with ending dates of 12/31/9999.

NOTE: Emergency addresses must be manually delimited because the HR/Payroll system assumes that an employee can have more than one emergency contact. Therefore, when a new emergency infotype is added, the system does not automatically delimit the former emergency record.

Maintain HR Master Data

Maintaining HR Master Data records involves processing existing HR master data records using one of the following functions:

- Creating new data
- Changing existing data
- Delimiting existing data
- Deleting data (only used by HR!)
- Copying data (to maintain history)

Using **PA30 – Maintain Master Data**, allows you to use the various functions to create, copy, change, and delete information, or enter a stop date on a specific infotype.

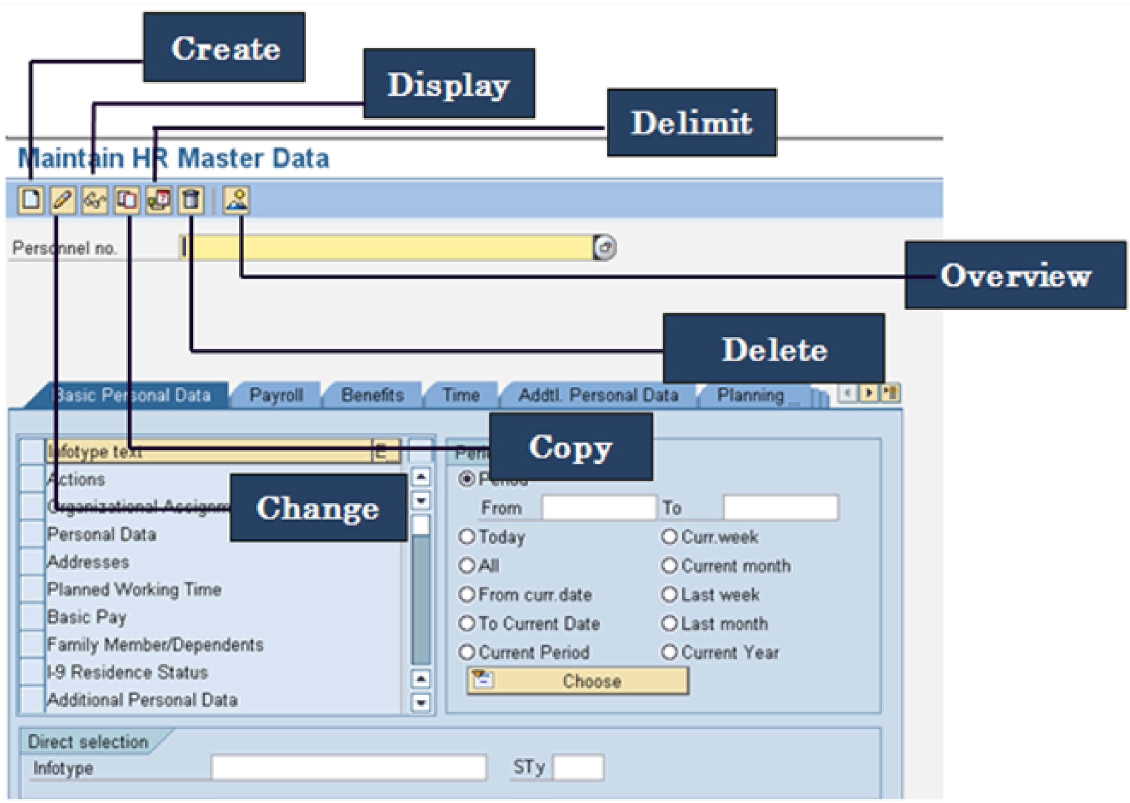
Screens and tasks to which you have access are determined by your OSC HR/Payroll system security role/s. Only certain business roles will have the security access to maintain master data records for the employees in your agency.

Some personnel information can be changed by the employee through Employee Self-Service (ESS), including:

- Tax Withholding
- Addresses
- Family Member/Dependents
- Bank Information

However, in order to provide you an opportunity to practice, the exercises in this training are designed to assume the employees do not have access to ESS.

Description of Buttons (Icons)



There are several ways to Maintain Master Data as listed below.

- **Create**: Create a new infotype for an existing employee.
- **Change**: **Do not use!** A decision has been made that the <u>best business practice</u> is to use the Copy function with the original date to overwrite existing data and correct data. You will <u>not</u> use the Pencil icon. You can only correct a current (not historical) record. Only BEST Shared Services can make changes to historical records.

- **Delete**: Eliminate a record. This function should be used with caution, because it permanently removes the information from the database, and cannot be retrieved.

  🗁 **Best Business Practice**: Have BEST Shared Services make these changes.

- **Delimit**: Enter an end date on an infotype to make it inactive.
- **Copy**: Modify or update an infotype to ensure that history is maintained (as long as you change the effective date accordingly). If you don't use a new effective date, you are overwriting history on some infotypes.

  🗁 **NOTE**: Ensure that you use the new effective date when you use this function.

- **Display**: View an individual infotype.
- **Overview**: View a list or summary of the infotype's data.

Copy Dates are Critical

There is an important distinction between using the Copy function with the original date and with a new effective date:

- Use the **original date** when you need to correct an error on existing infotypes. By using the infotype's original date, you are overwriting the history. Be aware that you can only use the Copy function to correct errors on some infotypes. For others, you will have to contact BEST.
- Use a **new effective date** when you want to create history.

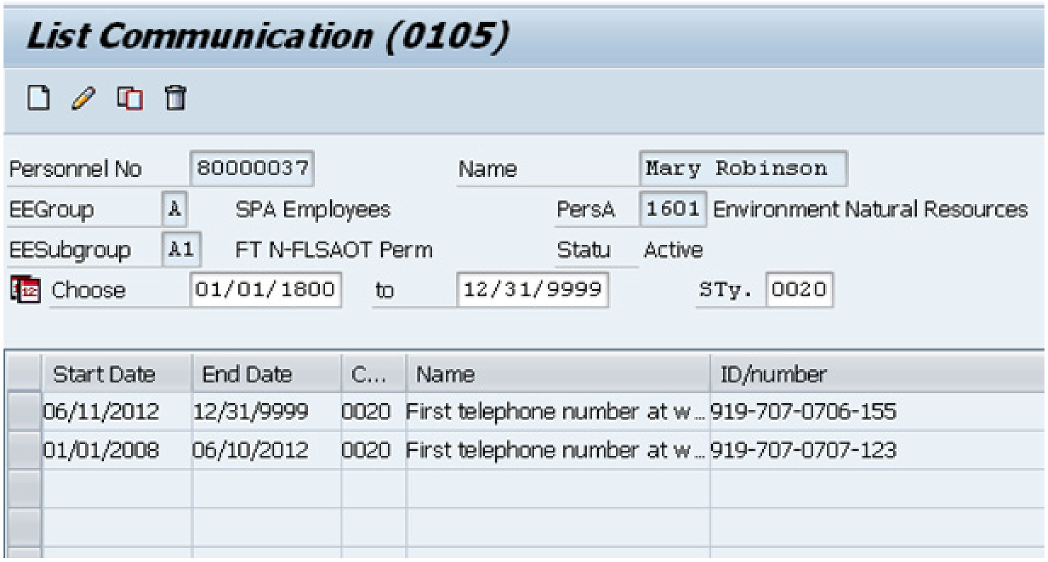
The original date is used to correct data errors. Using this function overwrites the existing data; therefore, there is no history of the former erroneous data. For example, if an employee's address was entered incorrectly (such as numbers transposed), you would not want the incorrect address on the employee's record. Using Copy function with the original date in this instance is appropriate so the correct address is displayed in the employee's record.

You must be extremely careful about the date when using the Copy function. For example, an employee has bank "A", and wants to change to bank "B" the first of next month. If you use the Copy function with the new date (the first of next month), there is a history of both banks. On the other hand, if you used Copy and forgot to put in the new date, it would look as if the employee had always used bank "B"; there would be no history of bank "A". Remember, when using Copy with the original date, there is no history.

🗁 **NOTE**: You can only Copy <u>current</u> records. Keep in mind all history changes must be sent to BEST Shared Services to be changed.

Change Versus Copy Function

(History versus no history)



Example: Communications - IT0105

Let's take the example of an employee who changed work phone numbers and needs to change to her new desk phone number. If you use the Copy command with a new effective date to change her phone number, the OSC HR/Payroll system creates a new record with a different start date. (Remember, the OSC HR/Payroll system is date driven!) This way, the history of the employee's phone number will show ***both*** numbers and the validity periods applicable to each. In the above example the employee's phone number was changed on 6/11/12 to reflect her new work phone number.

If you use the Copy function and don't change the effective date, your new entry overwrites the previous history. Now only the new phone number is in the record and there is no history of what her previous phone number was. It displays as if her phone number has always been 919-707-0707.

🗁 **NOTE:** Agencies cannot change the following master data changes on IT0002:

- Name
- Date of Birth
- Social Security

These changes must be completed by BEST Shared Services OM/PA team. You will need to include a copy of the Social Security card and Driver's License with your change request.

EXERCISE 2.1: PA30 - Modify Objects on Loan (IT0040)

SCENARIO

Rose Brown has been assigned a cell phone and a new office key today.

- The telephone number is: 919-555-1314. The serial number is 4N888.
- The office key number is #A1112.

BEST PRACTICE: When an employee receives more than one item on loan, best practice is to create a separate Objects on Loan infotype for each item. This allows each object on loan to be maintained individually.

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website **http://www.osc.nc.gov/training/osctd/help/**. Follow along with the BPP to complete the exercise.

1. On the Easy Access screen, enter transaction code **PA30** in the Command field and click .
2. From the table below, select the personnel number for Rose Brown as assigned your instructor and enter it into the Personnel number field.

	PERSONNEL #: *Rose Brown*						
A	80000165	F	80000170	K	80000175	P	80000180
B	80000166	G	80000171	L	80000176	Q	80000181
C	80000167	H	80000172	M	80000177	R	80000182
D	80000168	I	80000173	N	80000178	Inst 1	80000183
E	80000169	J	80000174	O	80000179	Inst 2	80000184

3. Select the infotype (**0040**) and applicable subtype (**11 – cell phone**).
4. Click the **Create (F5)** button.
5. Enter the new **effective date**.
6. Enter **1** in the Number field.
7. Click on the matchcode in the Unit field and select **pieces**.

   NOTE: This field will always be "pieces", no matter the digit/s in the Number field.
8. Enter the **serial number** in the Loan object no. field.
9. Enter the **cell phone number** in the Comments field.

10. Click the **Enter** button.

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

12. Enter the subtype for **office keys** (02).

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

14. Enter the **today's date** and the other applicable information.

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

QUESTIONS -

Answer the following questions:

Question 1

Which infotype did you use to enter the new cell phone?

- ❖

Question 2

What is the ending date and how was it entered?

- ❖

Question 3

What is the result if you do not enter a new effective date when you enter new data?

- ❖

This exercise is complete.

EXERCISE 2.2: PA30 - Bank Information (IT0009)

SCENARIO

Leona Grayson has informed you that in addition to her current bank she has a new bank to which she wants to direct 25% of her direct deposit into a checking account. In addition, she wants $100 to go to the new bank into a savings account. The remainder will go to the current bank in her checking account. The effective day is the first of next month. Update the employee's OSC HR/Payroll record to reflect the change to the banking information.

- New bank - Capital
- Bank key - 053112123
- Checking account - 24515487
- Savings account - 1257843.

Bank details

The completion of the Bank Details infotype (0009) must be entered in order for payroll to run on the new employee. If the bank details are not available at the time of the data entry, it is your responsibility to obtain that information and enter the infotype before the system is closed for payroll processing. Even if you have instructed the employee to enter the data in ESS, you still must follow up with the employee to ensure he or she makes the entry prior to payroll closing. When creating, closing or changing accounts, the timing is critical in OSC HR/Payroll.

CRITICAL! If an employee wants to close an account and move to a new account, you should advise the employee to leave the old bank account open until the direct deposit has correctly been made to the new bank or the new account.

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website **http://www.osc.nc.gov/training/osctd/help/**. Follow along with the BPP to complete the exercise.

1. On the Easy Access screen, enter transaction code **PA30** in the Command field and click .

2. From the table below, select the personnel number for Leona Grayson as assigned your instructor and enter it into the Personnel number field.

	PERSONNEL #: *Leona Grayson*						
A	80000145	F	80000150	K	80000155	P	80000160
B	80000146	G	80000151	L	80000156	Q	80000161
C	80000147	H	80000152	M	80000157	R	80000162
D	80000148	I	80000153	N	80000158	Inst 1	80000163
E	80000149	J	80000154	O	80000159	Inst 2	80000164

3. Select the **Bank Details** infotype and applicable subtype for **other bank**.

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

5. Enter the **first day of the next month** as the <u>Start</u> (effective) date.

6. Enter **053112123** in the bank key (routing number) field.

7. Enter **24515487** in the checking account number field.

8. Enter **01** in the Bank Control key field to signify that this deposit should be in a checking account.

9. Enter **25** in Standard Percentage field.

10. Click the **Enter** button.

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

12. Click the **Copy** button. (Observe that you are still on IT0009 / subtype 1 and all of the data has defaulted.)

    NOTE: The date has copied too!

13. Enter the **effective date**. (The defaulted date is the one from the current record. You need to enter a new date for the record you are now creating.)

14. The bank key (**053112123**) remained the same.

15. Enter **1257843** in the Account field.

16. Enter **02** in the Bank Control key field to indicate this is a **savings account**.

17. Enter **100.00** in Standard Value field.

18. Delete **25** from the Standard percentage field.

19. Click the **Enter** button.

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

QUESTIONS -

Answer the following questions:

Question 1

True or False: You have to enter data on 0008 Basic Pay infotype to enter the new banking information?

- ❖

Question 2

What adjustment did you have to make to indicate that the money should go into the savings account and not the checking account?

- ❖

Question 3

What advice would you give an employee who is making a bank change request?

- ❖

This exercise is complete.

* *

EXERCISE 2.3: PA30 - Communication (IT0105)

SCENARIO
The work telephone number for Janet Thomas has changed. Access the correct infotype and use the Copy function and date to create a new work number (919.456.2147).

Employee Telephone Directory

It is very important to enter and maintain the information on the Communication infotype (IT0105) now that the data from that infotype is interfaced to the State Employee Telephone Directory.

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website **http://www.osc.nc.gov/training/osctd/help/**. Follow along with the BPP to complete the exercise.

1. On the Easy Access screen, enter transaction code **PA30** in the Command field and click .

2. From the table below, select the personnel number for Janet Thomas as assigned your instructor and enter it into the Personnel number field.

	PERSONNEL #: *Janet Thomas*						
A	80000286	F	80000291	K	80000296	P	80000301
B	80000287	G	80000292	L	80000297	Q	80000302
C	80000288	H	80000293	M	80000298	R	80000303
D	80000289	I	80000294	N	80000299	Inst 1	80000304
E	80000290	J	80000295	O	80000300	Inst 2	80000305

3. Select the **Communications infotype (0105)**, **subtype 0020** (First telephone number at work).

4. Click the **Copy** button. This ensures that you will not overwrite the record and you will create history.

5. Enter **today's date** as the effective date.

6. Enter the new number as applicable (see the scenario above).

7. Click the **Enter** button. A warning message is displayed at the bottom of the screen.

8. Click the **Enter** button again to bypass the warning message.

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

10. Use the **Overview** button to verify that both the delimited number and the new number displayed on her record.

11. Click the **Back (F3)** button to return to the PA30 screen.

QUESTIONS -

Answer the following questions:

Question 1

True or False. In order to overwrite history and correct an error, use the Copy function with the original effective date.

❖

This exercise is complete.

EXERCISE 2.4: PA30 - Various Infotypes

SCENARIO

Patricia Calloway was married on the first day of the current month, but is keeping her name. The following changes need to be made to her employee records:

- Review her marital status to see if it has been updated from single to married. If not, who would you notify to make that revision?
- Update her federal and state tax withholding from single to married, and change the allowances to two. In addition, she wants an additional $10 withheld from each one.

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website **http://www.osc.nc.gov/training/osctd/help/**. Follow along with the BPP to complete the exercise.

1. On the Easy Access screen, enter transaction code **PA30** in the Command field and click .
2. From the table below, select the personnel number for Patricia Calloway as assigned your instructor and enter it into the Personnel number field.

	PERSONNEL #: *Patricia Calloway*						
A	80000306	F	80000311	K	80000316	P	80000321
B	80000307	G	80000312	L	80000317	Q	80000322
C	80000308	H	80000313	M	80000318	R	80000323
D	80000309	I	80000314	N	80000319	Inst 1	80000324
E	80000310	J	80000315	O	80000320	Inst 2	80000325

3. Select the **Personal Data infotype (0002)**.
4. Click the **Display (F7)** button. Review the information on the infotype.

   Has her marital status been updated? If No, then submit a request to BEST HR to change her marial status.

5. Click the **Back (F3)** button to return to the PA30 screen.
6. Enter the infotype to revise her federal and state tax withholding.

   HINT: You will need to search for the Withholding Info W4/W5 US infotype, and then enter the data using the appropriate subtypes.

HINT: Try a different tab other than the Basic Personal Data tab.

7. Change the **filing status** on both infotypes from single to married.

8. Indicate Patricia desires to have **2 allowances**.

9. Include an **additional $10** withheld from each.

10. Click the **Enter** button. Validate the data you entered. Remember…this affects the Employee's pay, so carefully proceed.

11. Click the **Enter** button to bypass the pop-up information box.

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

13. Repeat steps 6-11 to complete the State tax withholding record.

HINT: Don't forget to select North Carolina in the subtype field to access the State tax withholding record.

QUESTIONS -

Answer the following questions:

Question 1

True or False. If you use the Change function instead of the Copy function to update the employee's marital status from single to married, the record will display as if the employee has always been married.

❖

This exercise is complete.

EXERCISE 2.5: PA30 - Create New Addresses (IT0006)

SCENARIO

All of the addresses for Ronald Gonzalez need to be updated as of today. Enter the following addresses:

- **Permanent:**
  - 27 Grand Ave, Raleigh, NC, Wake County, 27604, Telephone: 919-234-0833.
- **Emergency:**
  - c/o Bob Adams, 13 Elm St, Raleigh, NC 27604, Telephone: 919-235-4356
- **Mailing:**
  - PO Box 133, Raleigh, NC, 27604

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website **http://www.osc.nc.gov/training/osctd/help/**. Follow along with the BPP to complete the exercise.

No instructions have been provided for this exercise. See if you can perform this exercise based on what you have previously learned. See the table below for the Personnel number for Ronald Gonzalez:.

	PERSONNEL #: *Ronald Gonzalez*						
A	80000366	F	80000371	K	80000376	P	80000381
B	80000367	G	80000372	L	80000377	Q	80000382
C	80000368	H	80000373	M	80000378	R	80000383
D	80000369	I	80000374	N	80000379	Inst 1	80000384
E	80000370	J	80000375	O	80000380	Inst 2	80000385

🗁 **NOTE**: Observe that after you enter a new permanent address and press Enter, a message displays at the bottom of the screen indicating that the former record will be delimited and the new record set to 12/31/9999. Click Save to accept this message.

QUESTIONS -

Answer the following questions:

Question 1

True or False. If an employee changes his or her address, it could affect the various tax infotypes.

❖

Question 2

True or False. If the employee's mailing address is the same as the permanent address, you don't have to enter the address on the mailing infotype.

❖

This exercise is complete.

* *

Delimiting Infotypes on PA30

There may be times when you need to delimit (put an end date) on an infotype.

Examples:

- An employee separated from State employment but did not return the State property (badge, keys, etc.) before he or she left. When the items are returned or recovered you will need to go into the employee's record and indicate that the items are no longer in the employee's possession.
- An employee transferred to another department. The employee only returned two of the three items. You would delimit the two items and leave the third item with 12/31/9999 as the end date. This example is one of the reasons it is a best practice to create a separate infotype for each item the employee has on loan.

* *

EXERCISE 2.6: PA30 - Delimit Infotyptes

SCENARIO

Marsha Sanders has been notified that the position she currently holds no longer requires that she have a pager and a cell phone. She turned in both of the items today.

- Before you begin the exercise, use the Overview function to view all of the items she has on loan. Observe that they all have an end date of 12/31/9999.
- Delimit the items on the Objects on Loan infotype using the applicable subtype.
- After you complete the exercise, view the list again. Observe that the pager and cell phone now have a delimited end date.

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website **http://www.osc.nc.gov/training/osctd/help/**. Follow along with the BPP to complete the exercise.

1. On the Easy Access screen, enter transaction code **PA30** in the Command field and click .
2. From the table below, select the personnel number for Marsha Sanders as assigned your instructor and enter it into the Personnel number field.

	PERSONNEL #: *Marsha Sanders*						
A	80001163	F	80001168	K	80001173	P	80001178
B	80001164	G	80001169	L	80001174	Q	80001179
C	80001165	H	80001170	M	80001175	R	80001180
D	80001166	I	80001171	N	80001176	Inst 1	80001181
E	80001167	J	80001172	O	80001177	Inst 2	80001182

3. Select the **Objects on Loan (0040)** / subtype **11**.
4. Click the **Enter** button to ensure that you have selected the correct item.
5. Click the **Delimit (Shift+F1)** button. A pop-up window is displayed (in some cases) requesting that you enter the delimit date.
6. In the Delimit Date field, enter the **date** the item is to be delimited and click the **check mark**.

You can also enter the delimit date down from the Choose field on the Delimit Objects on Loan screen.

CAUTION!! Keep in mind that the system delimits a transaction one day prior; therefore, if the employee turned in the item today, you would enter the date as of today. When the system delimits the date, it shows that the employee was responsible for the item up through yesterday.

7. Click the **green check mark** on the pop-up information box to continue.
8. On the Delimit Objects on Loan screen, select the **line item**.
9. Click the **Delimit (Shift+F1)** button.
10. Click the **Overview (Shift+F8)** button to review the Objects on Loan with the applicable subtype to verify that the item is delimited on the appropriate date.
11. Click the **Back (F3)** button.

This exercise is complete.

* *

EXERCISE 2.7: PA30 - Additional Personal Data (IT0077)

SCENARIO

Sang Schubert has submitted documentation that indicates he now has handicap status because he must use a wheelchair.

- Access the Additional Personal Data infotype and make the appropriate revision.

Instructions

No instructions have been provided for this exercise. See if you can perform this exercise based on what you have previously learned. See the table below for the Personnel number for Sang Schubert:.

	PERSONNEL #: *Sang Schubert*						
A	80000895	F	80000900	K	80000905	P	80000910
B	80000896	G	80000901	L	80000906	Q	80000911
C	80000897	H	80000902	M	80000907	R	80000912
D	80000898	I	80000903	N	80000908	Inst 1	80000913
E	80000899	J	80000904	O	80000909	Inst 2	80000914

This exercise is complete.

* *

* *

EXERCISE 2.8: PA30 - Certification (IT0795)

SCENARIO

Helen Stephens has submitted documentation that indicates she received a Commercial level driver's license from the NC Department of Motor Vehicles.

- Access the Certifications and Licensing infotype and make the appropriate revision.
  - — Valid from 09/01/2012 – 08/31/2016
  - — License # NC32837
  - — There are no specifications
  - — It is renewable

🗁 **NOTE**: In your work environment, you would only enter a certification or license if the employee's position required it. However, in this scenario, the license is being added for training purposes even though Helen's position does not require it.

🗁 **NOTE**: Start and To dates should match the Valid From and Valid To dates.

Instructions

No instructions have been provided for this exercise. See if you can perform this exercise based on what you have previously learned. See the table below for the Personnel number for Helen Stephens:

	PERSONNEL #: *Helen Stephens*						
A	80000346	F	80000351	K	80000356	P	80000361
B	80000347	G	80000352	L	80000357	Q	80000362
C	80000348	H	80000353	M	80000358	R	80000363
D	80000349	I	80000354	N	80000359	Inst 1	80000364
E	80000350	J	80000355	O	80000360	Inst 2	80000365

This exercise is complete.

* *

Monitoring of Tasks (IT0019)

IT0019 is like a tickler file that is date driven. A report is run to determine which employees have transactions coming due soon. Run BI report B0099 or the Date Monitoring report (S_PH0_48000450) in the OSC HR/Payroll system to view the various tasks due. If the task is completed prior to the due date entered, it will still display on the Date Monitoring report unless you change the end date of the Monitoring of Tasks infotype.

You may need to enter more than one IT0019 for a transaction. For example, if an employee is a new hire, you would enter IT0019 to follow-up on the probationary period, and another one regarding the foster child documentation.

* *

EXERCISE 2.9: PA30 - Monitoring of Tasks (IT0019)

SCENARIO

Kumar Reinaldo has indicated that he is an RN (Registered Nurse) on his application. This needs to be verified within 90 days of his hire date.

- Assume his hire date is *today*.

Instructions

No instructions have been provided for this exercise. Using knowledge that you learned in previous exercises, create a Monitoring of Tasks record to remind you to verify Kumar's RN education.

See the table below for the Personnel number for Kumar Reinaldo:

	PERSONNEL #: *Kumar Renaldo*						
A	80000326	F	80000331	K	80000336	P	80000341
B	80000327	G	80000332	L	80000337	Q	80000342
C	80000328	H	80000333	M	80000338	R	80000343
D	80000329	I	80000334	N	80000339	Inst 1	80000344
E	80000330	J	80000335	O	80000340	Inst 2	80000345

🗁 **Remember** – upon completing this verification, the processing indicator would need to be changed to "task completed."

QUESTIONS -

Answer the following questions:

Question 1

List three other events below when you might use a Monitoring of Task record.

- ❖
- ❖
- ❖

This exercise is complete.

* *

SUMMARY

In this lesson you learned to:

- Describe the process to maintain employee data.
- Identify the transaction code used to update employee data.
- Distinguish among the editing functions.
- Use the OSC HR/Payroll system to maintain employee data.

Creating Benefits Adjustments

Objectives

Upon completion of this lesson, you should be able to:

- Identify the steps needed prior to creating an employee's benefits adjustment.
- Create a benefits adjustment.

Benefits Adjustments

The Adjustments Reasons infotype (IT0378) may need to be maintained when:

- A Qualifying Life Event (QE) occurs
- Documentation of QE is verified

Employees have 30 days from date of QE to make allowable changes to benefits plans.

After an employee enrolls in a benefits plan, he or she can only make changes to the plan during the year when a qualifying life event occurs, or during the annual enrollment period.

Examples of qualifying life events include:

- Marriage
- Birth or adoption of a child
- Adding a foster or stepchild
- Divorce
- Death

Creating Benefit Infotypes

You must verify the qualifying event documentation, and maintain the documentation in accordance with State policy. Documentation is to be maintained at the Agency level.

In order for the benefits to be changed, the HR Master Data Maintainer must access PA30 and create an infotype for Adjustment Reasons (IT0378).

After IT0378 is created, employees can change their benefits by either:

- Accessing Employee Self Service (ESS) and making the change or,
- Completing applicable paper forms and submitting them to BEST Shared Services

The effective date for IT0378 is the date of the qualifying event. For example, in the case of the birth of a child, it is the date the child was born.

For all except birth of a child, Benefit Plans start the first of the month after the Adjustment Reason date. For example, a spouse loses his or her job and health coverage as of 01/31/12 and the State employee wants spouse coverage to begin 02/01/12. IT0378 must be dated 01/31/12, so that the 30-day window will be from 01/31 - 03/01. If IT0378 was entered with a date of 02/01/2012, the Benefit Plan would not begin until March 1.

> There is a Web-based training course available for creating an adjustment reason - ***PA330 – Create Adjustment Reasons***
>
> LINK: http://www.osc.nc.gov/training/osctd/help/Benefits/JobAids.html

Adjustment Reasons Subtypes

Created by Agencies

When you create IT0378, there are several adjustment reasons that are listed in the drop-down list. However, you will only use a few of those reasons, as listed below:

Adjustment Resons Created by Agencies	
ADDF	Enroll family
DCAR	FSA Dep Changes (dependent Child FSA changes)
DRPF	Drop Family
DTH	Death of Dependent
DVC	Divorce
MRG	Marriage (employee marries)
MRGD	Dependent marries
NCHD	Add Folster/Step Child
NEWB	Health Insurance for Baby (use for birth or adoption of a child)
SEP	Separation
SMC	Substantial Monetary Change
SRQ	Subscriber Request

If an employee has benefits adjustments other than those listed above, the employee must contact BEST Shared Services.

NOTE: Documentation to verify proof that the employee's qualifying event is valued should be maintain by the agency.

Created by BEST Shared Services

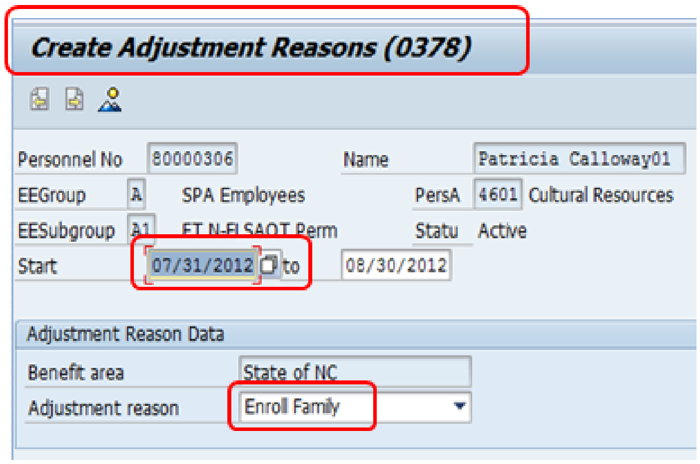
BEST Shared Services has the authority to use all of the benefits reasons, including the ones used by the Agencies (listed on previous page).

Adjustment Resons Created by BEST Shared Services	
ADMN	Admin. Corrections (Administrative Corrections)
BENE	Beneficiary Changes
COR	Change of Residence
CTO	Court Ordered Support
FLOE	NCFlex Annl Enroll (NCFlex Annual Enrollment)
FSC	Cancel while on FMLA
FSN	FMLA Non-payment
HIOE	Hlth Ins Annl Enroll (Health Insurance Annual Enrollment)
HIRE	New Hire **NOTE**:: This adjustment reason is only used for a new hire that has never been in the OSC HR/Payroll system before. Employees that are reinstated are given the Newly Eligible adjustment reason.
MCP	Medicare is Primary
MLT	Military Leave Term
NPY	Non-payment of Health (SHP only)
NWEL	Newly Eligible (used for reinstated employees and transfers from Non-BEACON agencies)
ODP	Maximum Age Dep.
OLV	LOA without leave (and without pay) - note that the adjustment name is not the same as the name of the Action (LOA)
PTAX	Pretax to Post tax
REC	Hrs < 20 Not Eligible
RFL	Return LOA (without Leave) - note that the adjustment name is not the same as the name of the action (Reinstatement)
RHN	Reduced Hrs - No COBRA
SAV	Savings Plans
SMC	Subst. Money Change (Substantial Money Change)
STD	Short-term Disability

Additional reasons that an employee must call BEST Shared Services for are listed above.

Additional Resource
You can find several additional support materials about Adjustment Reasons on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/index.html Follow this path to access the latest version of the following Job Aids: *Benefits > Job Aids* • Adjustment Reasons

Example: Enroll Family



PROCESSES:

Employee notifies Agency <u>within 30 days</u> her spouse lost his job and needs to be added to SHP.

- **Agency** uses PA30
- **IT0378**, subtype **ADDF**
- Enter Qualifying Event Date (date spouse loses other coverage)
- **Save**

Employee notifies Agency <u>after</u> 30 days

- Employee will need to wait until the next Annual Enrollment to add spouse to the plan

When creating an adjustment reason for No Longer a Student, the date the employee notifies you is important. If you are notified within 30 days of the event (no longer a student), you can create IT0378 so that the employee can go into ESS and remove the dependent.

However, if you are not notified until after 30 days, you will not be able to create the adjustment at your level. In that case, you (or the employee) must notify BEST, and BEST will have to create the adjustment (see next page).

Effective Dates of the Plans

State Health Plan

- 1st of the month following the Qualifying Event or the 1st of the 2nd month

🗁 **Exception**: NEWB – A Newborn or adopted child can be added the date of birth/adoption or the 1st of the following month

NCFlex

- 1st of the month following the Qualifying Event

If notification regarding the child no longer being a student is done 30 days after the event, the employee must understand the following:

- Any claims that were paid on behalf of the student after the qualifying event will have to be repaid to the insurance company
- Any premiums that the employee had deducted to pay for coverage including the child after the qualifying event will not be reimbursed

* *

EXERCISE 3.1: Benefits Adjustment

SCENARIO

Emily Stafford has provided documentation that she just had a daughter who needs to be added to her benefit plan. The baby was born the first day of the current month.

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website **http://www.osc.nc.gov/training/osctd/help/**. Follow along with the BPP to complete the exercise.

1. Enter transaction code **PA30** in the Command field on the Easy Access screen, and click **Enter**.
2. From the table below, select the personnel number for Emily Stafford as assigned your instructor and enter it into the Personnel number field.

	PERSONNEL #: *Emily Stafford*							
A	80000206	F	80000211	K	80000216	P	80000221
B	80000207	G	80000212	L	80000217	Q	80000222
C	80000208	H	80000213	M	80000218	R	80000223
D	80000209	I	80000214	N	80000219	Inst 1	80000224
E	80000210	J	80000215	O	80000220	Inst 2	80000225

3. Enter the **Adjustment Reasons infotype (IT0378)**, subtype **NEWB**.

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

5. Change the **Start date** to reflect the child's birth.

6. Click the **Enter** button.

   NOTE: If the Start date was changed from today's date, the Deviation from end data window is displayed informing you that the end date is going to change to within 30 days of the Start date. This is important because the employee only has 30 days to enroll the child.

7. Click the **Yes** Yes button.

8. Click the **Enter** button.

9. Click **Save.**

QUESTIONS -

Answer the following questions:

Question 1

What infotype did you have to create first before the new dependent could be added?

- ❖

Question 2

What advice would you give employees about how to get the life event processed on their family member/dependent record?

- ❖

This exercise is complete.

* *

SUMMARY

In this lesson you learned to:

- Identify the steps needed prior to creating an employee's benefits adjustment.
- Create a benefits adjustment.

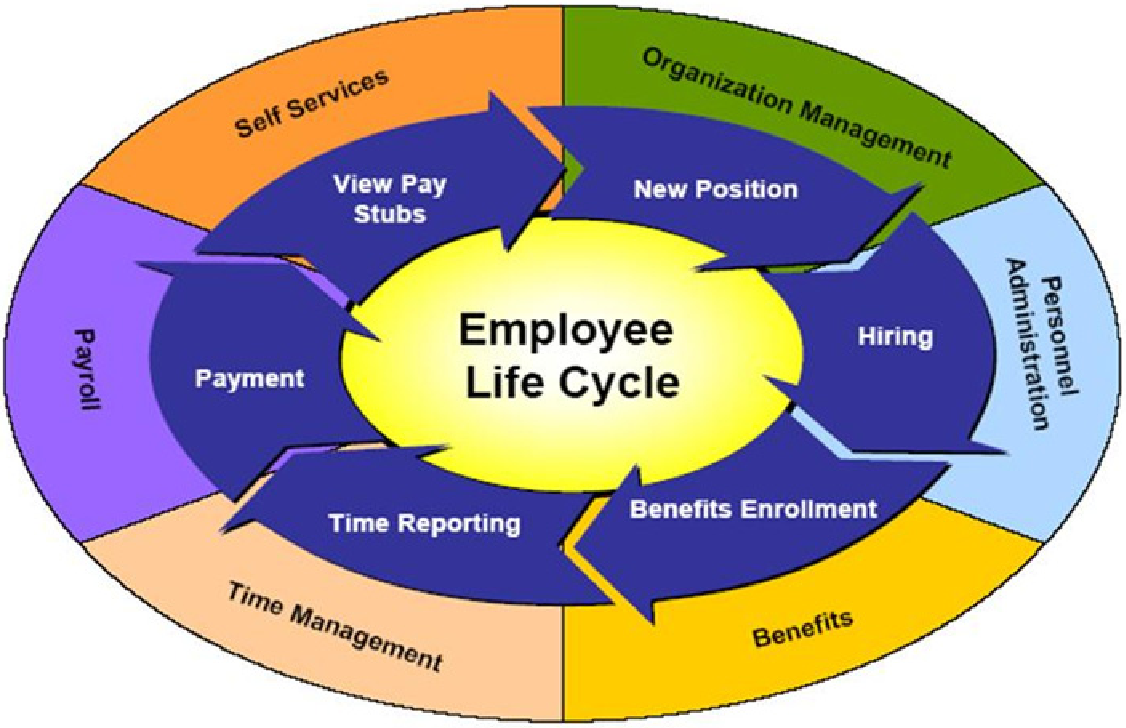
Connecting the HR/Payroll Dots

Objectives

Upon completion of this lesson, you should be able to:

- Identify how PA Actions affect employee time and pay
- Describe how a work schedule assignment affects an employee's pay
- Revise a work schedule
- Create a substitution
- Revise the time settings on a position
- Explain when to notify payroll regarding changes in settings

HR/Payroll System Integration



Based on the exercises you have performed thus far, you should have a good understanding of the various infotypes that are part of an employee's personnel record. Because the OSC HR/Payroll is an integrated system, every entry made in Personnel Administration affects some component of an employee's time and pay.

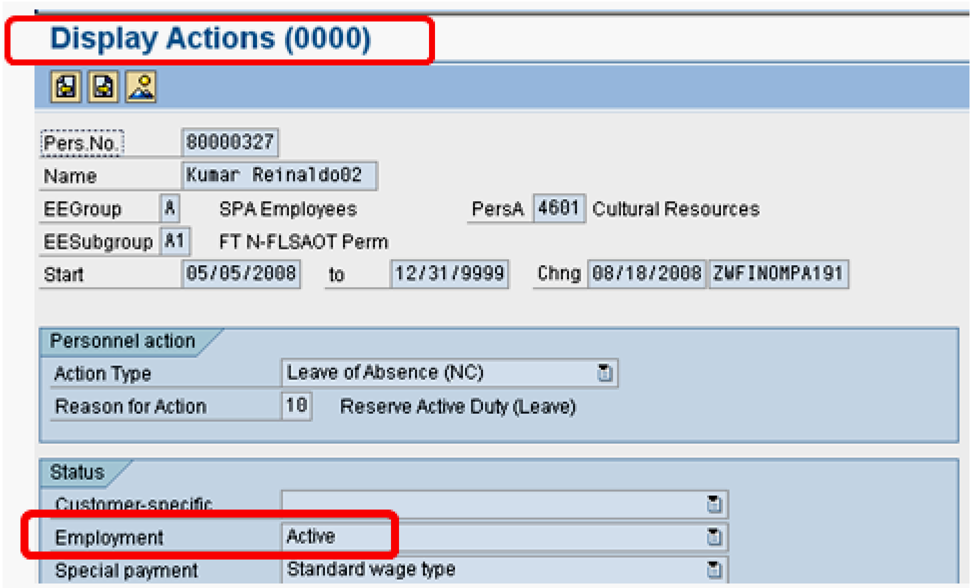
PA Infotypes and Time/Benefits/Payroll

Infotypes	
IT0000	Actions
IT0001	Organizational Assignment
IT0002	Personal Data
IT0006	Address (permanent)
IT0007	Planned Working Time
IT0008	Basic Pay
IT0041	Date Specifications
IT0552	Time Specification / Employ. Period
IT2003	Substitution
IT0001	Absences

The infotypes listed above are entered in PA, but affect an employee's time, benefits and payroll. It is important to understand how the entries made in PA are related to results in those areas.

Actions (IT0000)

In addition to Time and Payroll, Benefits also pulls information from IT0000 and IT0001.

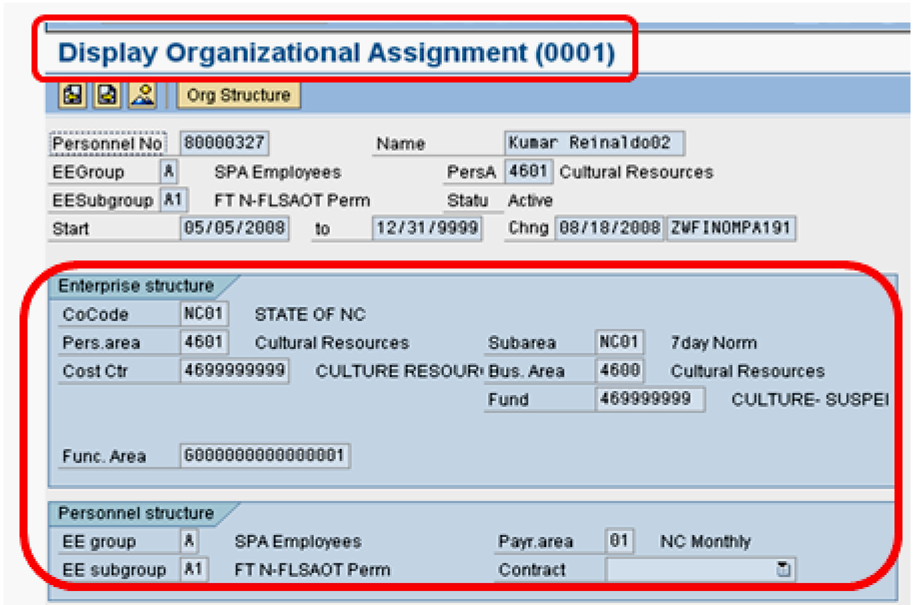


The Actions IT0000 infotype indicates the events that occurred on the employee's personnel record. Some examples are:

- New Hire
- Promotion
- Range Revision

In addition, the infotype shows the employment status (Active, Inactive, Withdrawn). The Time, Payroll, and Benefits modules also use information from IT0000.

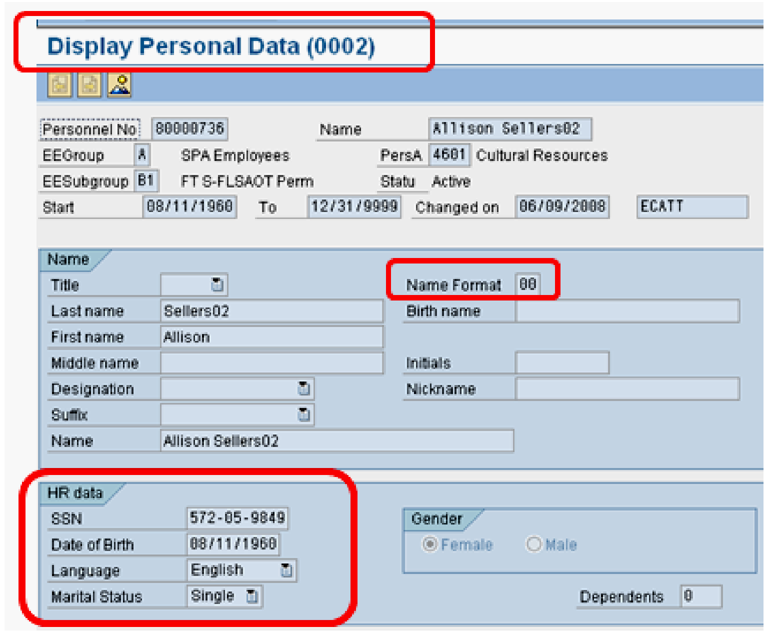
Org Assignment (IT0001)



- Employee Group
- Employee Subgroup
- Personnel Area
- Personnel Subarea
- Payroll Area
- Percentage (always 100%)
- Position and Job
- Org Unit

For a complete description of the above infotypes, see *Lesson 1: Personnel Administration Review.*

Personal Data (IT0002)

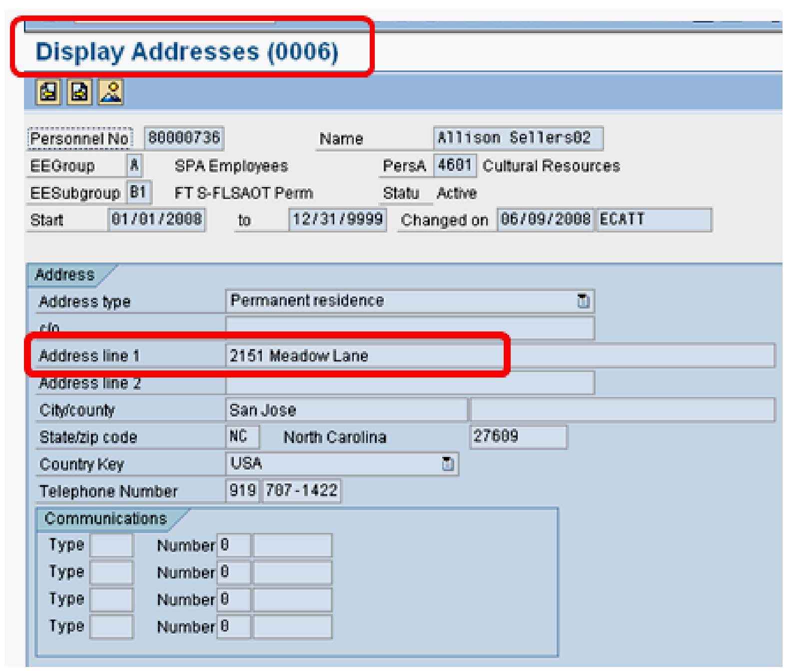


The Personal Data infotype contains Social security number, date of birth and marital status—information that is important for tax reporting, payroll, and benefits.

- **IMPORTANT**: All personal data changes must be maintained by BEST HR.

- **Critical!!!** – Do not change the Name Format field default. This field should ALWAYS be "00".

Addresses (IT0006)



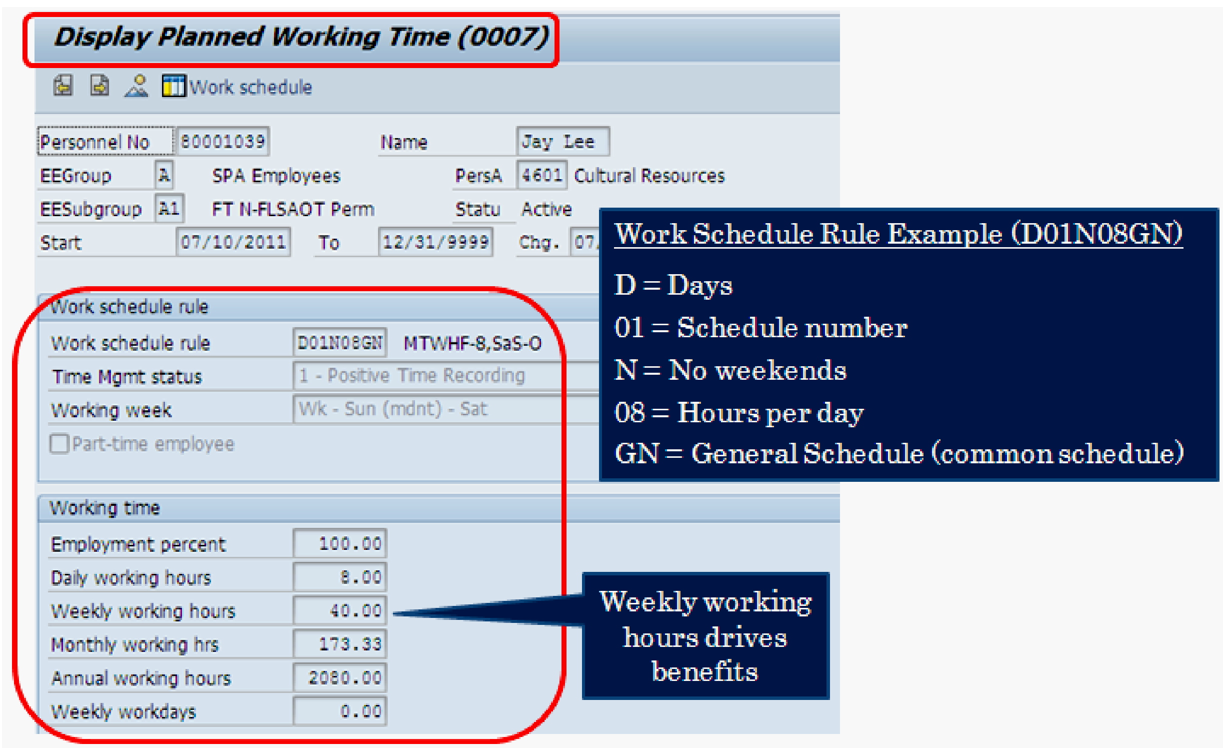
The various tax infotypes (Residence Tax, Work Tax Area, Unemployment State) are dynamically associated with IT0006 – permanent address. If IT0006 is skipped during the New Hire Action, the tax infotypes do not display, and the employee's record will error out in payroll.

NOTE: When entering an address, always select the appropriate subtype and begin with Address line 1 and only use Address line 2 when necessary to enter additional address information. (There is a limitation of 35 characters on Line 1 and 25 characters on Line 2.)

If the address information is incorrect, employees do not receive W2s at the end of the year.

Additional Resource
You can find several additional support materials about Address formats and abbreviations on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/index.html Follow this path to access the latest versions of the support materials: *Personnel Administration > Job Aids* • Address Helps and Hints

Planned Working Time (IT0007)



The **Work Schedule Rule (WSR)** is the foundation upon which an employee's time is processed in the HR/Payroll system. Each employee is assigned a WSR in PA that best represents his or her work pattern. The WSR combines an assigned holiday calendar (the main State holiday calendar or an alternate calendar approved by OSP) with a repeatable pattern of work representing an employee's scheduled work days as well as scheduled non-work days.

The WSR can represent work patterns repeated over a single or multiple weeks and may include day, evening and night shift designations that trigger premium payments (if applicable) at rates designated on the employee's position (if the position is appropriately flagged).

The WSR does not limit the number of hours an employee may record on any given day, but will only allow leave to be taken on scheduled work days. Many fields are dynamic and trigger other time functions. For example, Time Sheet Defaults (IT3015) are directly related to the Time Management Status field on IT0007. Only record absences and exceptions. If a negative time employee is on Leave of Absence, IT0007 must be revised to change the employee to positive during the Leave and changed back to negative upon Reinstatement/Reemployment. The Employment percent field should usually be 100% except for DOT and certain exceptions.

An employee should only be assigned as a negative time employee if he or she is working 5 days a week, 8 hours a day and exempt from FSLA, NC01 calendar.

Enter the number of hours this individual will work per week, and click Enter to have the system validate the details. The Planned Working Schedule and Time Mgmt status defaults from the employee's enterprise structure.

<u>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.</u> If the individual is part-time, be sure to check the Part-time employee box. The defaulted work schedule is based on information provided by the various agencies and OSC HR/Payroll team members.

Leave of Absence

Although Leave of Absence (LOA) is covered in the *PA420-Leave of Absence* course, you should be aware of how the LOA Action affects an employee's time.

Without exception, all <u>full-time employees</u> must be on a 5 -day 8-hour per day work schedule. The easiest way to accomplish this is to use D01N08GN. All employees, whether full-time or part-time, must be positive time recording.

For <u>part-time employees</u>, select an equivalent work schedule M-F. Example – PT EE 36 hrs equivalent schedule would be 5 x 7.2 = WSR DD9N1001

A <u>28-day employee</u> will remain on the 28-day working week as long as they are exhausting leave. The working week should be changed to the normal agency-specific working week on the 1st day they use LWOP. The work schedule rule is still changed to D01N08GN.

information provided by the various agencies and OSC HR/Payroll team members.

* *

EXERCISE 4.1: Maintain Working Schedule

SCENARIO

The first day of this month, Jimmy Chonez has requested and been granted a permanent move:

- From his current shift
- To a 4-day work week nights, 10 hours Tuesday – Friday with Monday, Saturday, Sunday off.

Instructions

Use the information you have learned to complete the following steps:

1. Access **PA30**.

2. From the table below, select the personnel number assigned to you by your instructor

	Personnel #: *Jimmy Chonez*						
A	10000011	F	10000016	K	10000021	P	10000026
B	10000012	G	10000017	L	10000022	Q	10000027
C	10000013	H	10000018	M	10000023	R	10000028
D	10000014	I	10000019	N	10000024	Inst 1	10000029
E	10000015	J	10000020	O	10000025	Inst 2	10000030

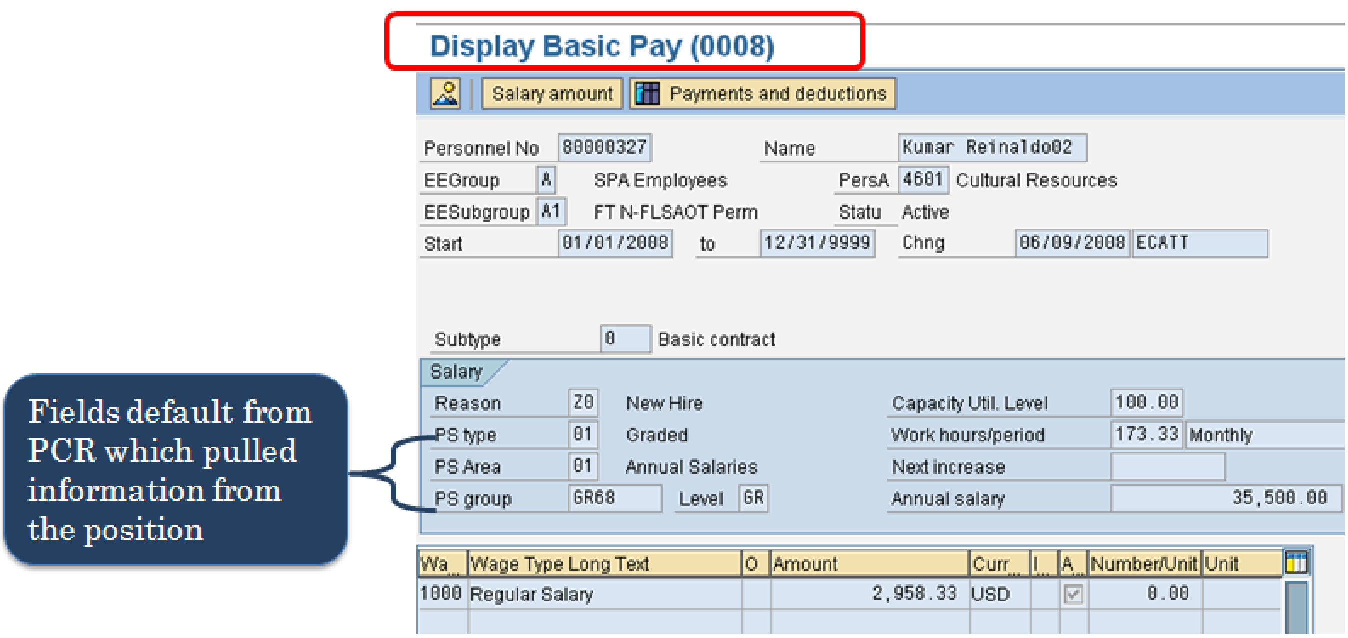
3. Access the applicable infotype.

4. Update Jimmy's files.

This exercise is complete.

* *

Basic Pay (IT0008)



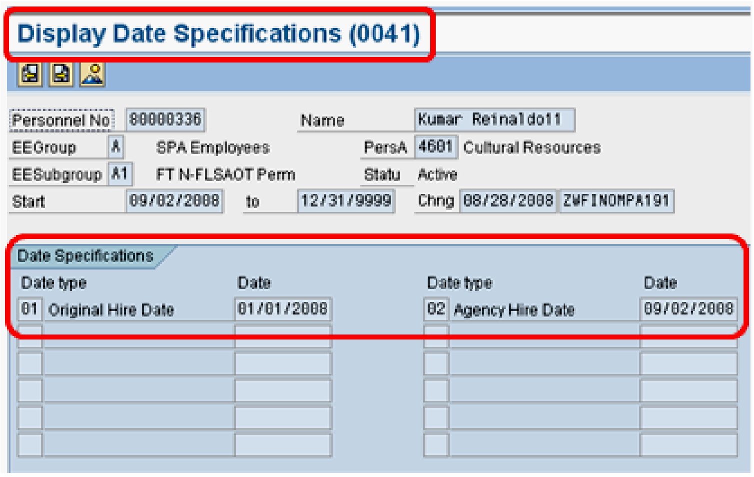
Basic Pay: Salary or Hourly wages

The Basic Pay IT0008 pulls information from both position settings and PA actions. The reason coincides with the Action type. The pay settings display information from the employee's action record.

The **Capacity Util Level** should always be 100%.

NOTE: Do not change via PA30 without a PCR with the correct salary.

Date Specifications (IT0041)

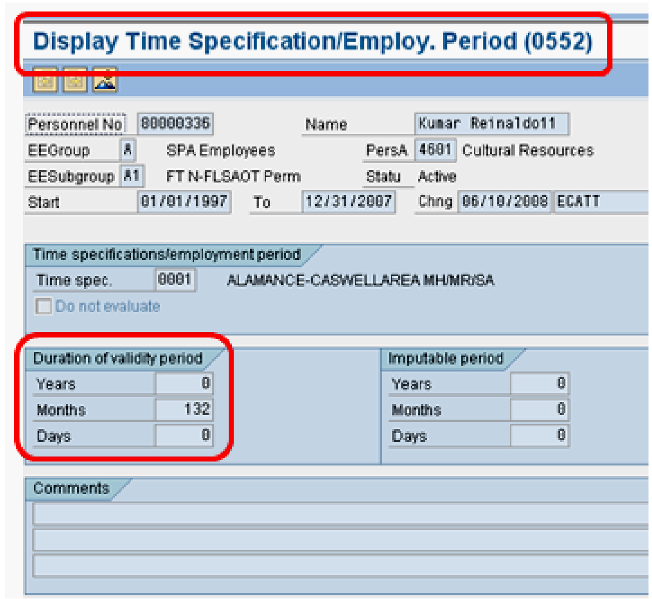


Time evaluation may be used for leave accruals on date types contained on IT0041 for all permanent employees. (Newly hired Supplemental Staff employees will not have IT0041.) Initially the Original Hire Date and Agency Hire date are the same.

NOTE: The IT0041 is important when it comes to retirement and RIF eligibility.

Additional Resource
You can find several additional support materials about the Date Specifications infotype on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/index.html Follow this path to access the latest version of the support materials listed below: *Personnel Administration > Job Aids* • Change Date Specifications

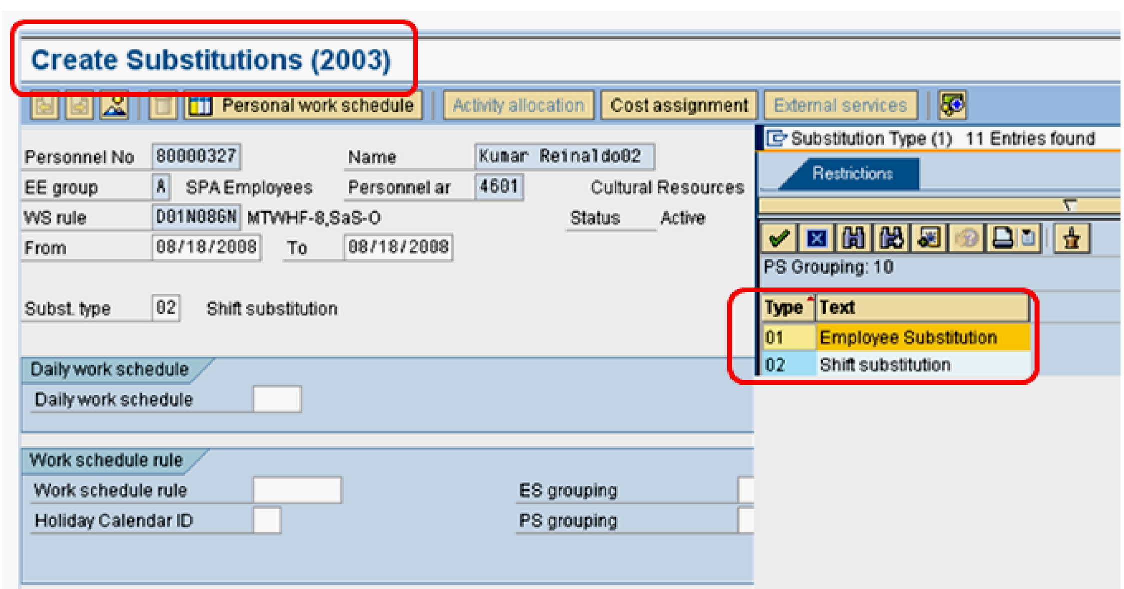
Time Specification/Employ. Period - (IT0552)



IT0552 is maintained by BEST HR through submission of a ticket. Do not change the date on the original (conversion) IT0552 so that it calculates the total time. If the conversion data is incorrect or you need to insert prior State service, submit a completed creditable state service form to BEST HR (rather than manipulating the end date on the original IT0552).

For example, an employee has an HR/Payroll system record of 50 total service months with the State and leaves State employment to work for a local government agency from which the State accepts time worked. When the employee is re-instated into the HR/Payroll system, submit the completed form to BEST HR.

Substitutions (IT2003)



The **Substitutions** (IT2003) infotype is used to indicate that the employee is temporarily working something other than his or her regular schedule. Substitutions may be daily or for weeks at a time. IT0007 – Planned Working Time is overwritten with the properties of the Substituted schedule. An example could be when:

- An employee is working at a time other than his or her planned work schedule (for example: employee works a shift with premium pay is being asked to work a shift where premium pay is not eligible or is eligible at a different rate, or vice versa).
- A full-time employee is returning from a Worker's Comp LOA (Reinstated Action), but is only working 4 hours a day. PA30 is used to create Substitution (IT2003) with a 4-hour schedule. In this case, IT0008 must also be adjusted.

Substitution is *only* used when the work schedule change is temporary. If the employee will be permanently assigned to a new schedule, use IT0007 to change the Work Schedule Rule appropriately.

🗁 Be sure to select the correct Employee Subgroup and Personnel Area groupings.

* *

EXERCISE 4.2: Maintain Substitutions

SCENARIO

Be sure the read the information in the Student Guide concerning the Substitutions infotype.

Jimmy Chonez is being asked to work the day shift Saturday and Sunday next week which are normally his days off. His normal work schedule indicates that he gets night shift premium. For these two days, night shift premium should not be paid.

Create a Substitution for him for those two days and select the appropriate Work Schedule Rule (WSR).

Instructions

1. From the Easy Access screen, enter **PA30** into the Command Field and click **Enter**.
2. Use the same Jimmy Chonez that you used in the previous exercise as assigned by your instructor. See table below.

	PERSONNEL #: *Jimmy Chonez*						
A	10000011	F	10000016	K	10000021	P	10000026
B	10000012	G	10000017	L	10000022	Q	10000027
C	10000013	H	10000018	M	10000023	R	10000028
D	10000014	I	10000019	N	10000024	Inst 1	10000029
E	10000015	J	10000020	O	10000025	Inst 2	10000030

3. Enter the **Substitutions** infotype.
4. Click the **Create** button. The subtype field should have defaulted to Shift Substitution. If necessary, enter the subtype code.

5. Enter the **From date** to reflect next Saturday's date and enter the **Sunday date** for the To date.

6. Enter **1D10** in the Daily work schedule field (use the matchcode to see all of the available options).

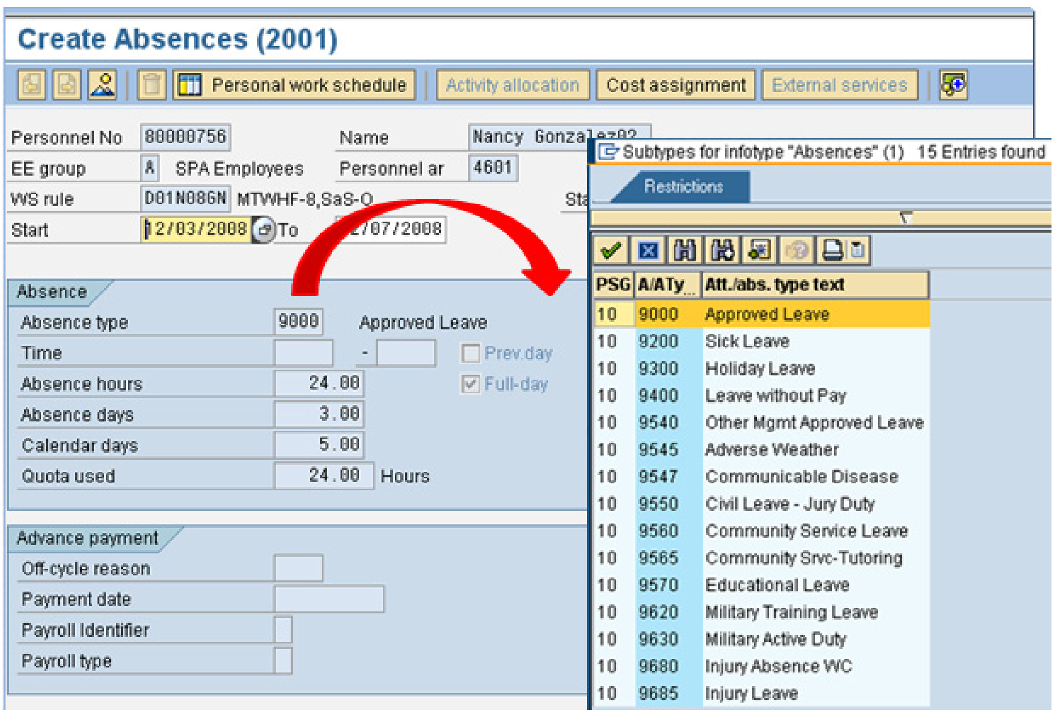
7. Click the **Enter** button.

8. Click **Save**.

This exercise is complete.

* *

Absences (IT2001)



The Absences infotype only displays if you selected a leave type from the subtype for Absences pop-up.

The Absences infotype (IT2001) indicates the number of hours the employee wants to use for leave and deducts from the leave quotas as applicable. If the employee should not accrue leave or longevity while on unpaid leave, enter Time Code 9400 (LWOP) in IT2001 (see State policy regarding accrual and longevity exceptions for Workers' Comp, law enforcement and military leave). Once you enter the date and press Enter, the system will automatically calculate the number of absence hours and days. These numbers default based on the work schedule rule on IT0007. The dates that are used on the infotype:

- The "start date" should automatically pre-populate based on the effective date of the LOA Action.
- Enter the" to date" to reflect the number of hours of leave the employee wants to use (or for code 9400 if unpaid leave). <u>Never enter 12/31/9999</u> as the" to date".

While IT2001 is entered during the LOA Action, it may be necessary to use PA30 in some circumstances:

- The employee wants to exhaust more than one leave type while on LOA. Since only one type can be entered in the LOA Action, PA30 is necessary to create the additional absences and leave types.
- The employee does not return when expected and wants to extend the use of leave.
- The employee returns earlier than planned and the infotype needs to be delimited.

When the dates are entered, the hours that default are based on the work schedule rule entered on the Substitution infotype (IT2003) which was created as part of the LOA Action.

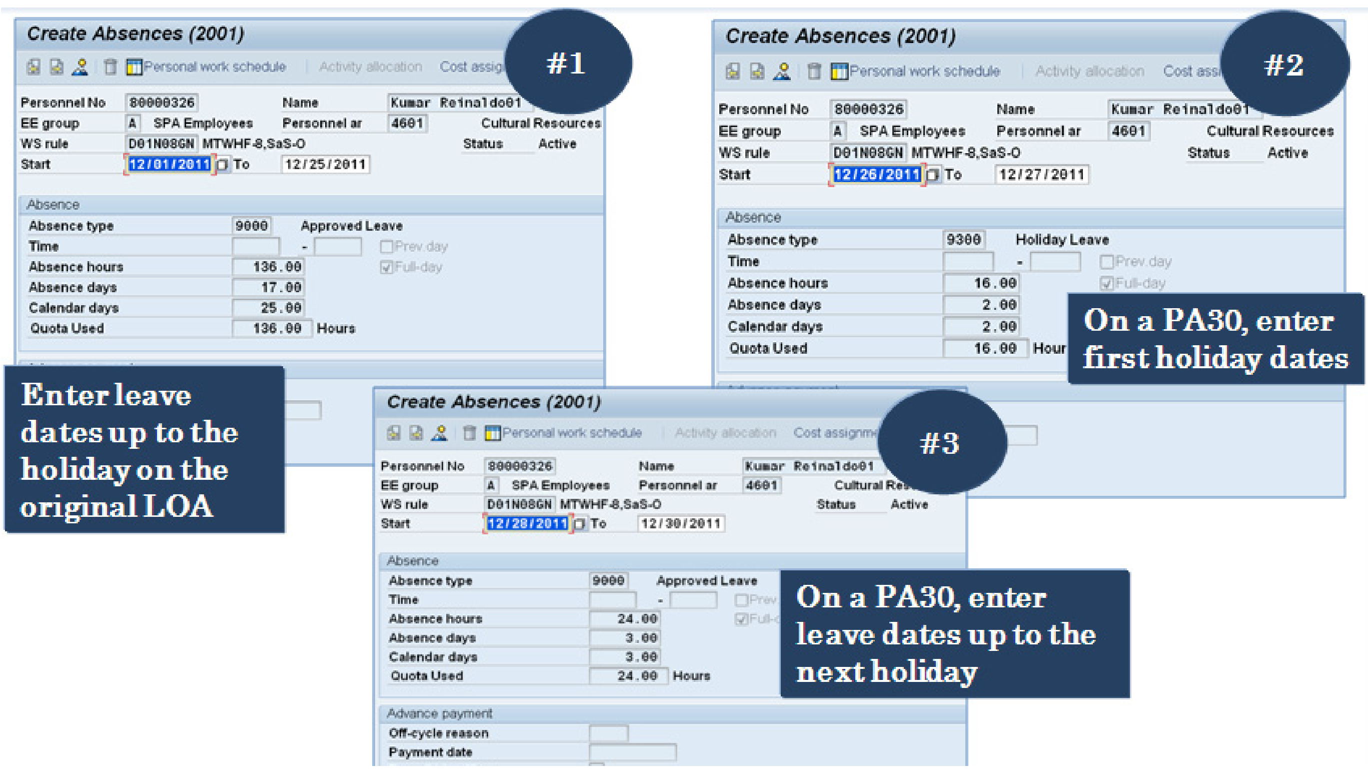
Because the OSC HR/Payroll system is integrated, the hours entered on the Create Absences infotype are fed directly to payroll. A time sheet does not have to be entered.

As long as the employee is receiving pay (leave or work), benefits will continue to be deducted. If not receiving pay, employee must pay for benefits or discontinue them.

🗁 NOTE: Using leave accrued while out on leave: If an employee wants to use the time that was accrued while he or she was out on paid leave, you will have to create a new IT2001 via PA30 in order to enter the new leave time.

🗁 Best Business Practice: Create IT2001 to exhaust leave on a monthly basis rather than the entire LOA period.

Absences (IT2001) Example with Holidays



If the employee is using leave during a time that includes a holiday, additional IT2001 infotypes will be necessary to allow the employee to take holiday leave. The additional IT2001 records are created in transaction PA30. For example, assume an employee is going out on military leave on December 18 and wants to exhaust 160 hours vacation prior to beginning the military 30 days. In this scenario, there are two holiday periods (12/26 – 12/27 and 1/3/2012. Your entries would be as follows:

1. During the LOA Action, on the Absences (IT2001) infotype, you will enter the dates for the leave to be exhausted **up to** the holiday period in the Start and To fields:

   Start: 12/01/2011 *To*: 12/25/2011 (136 hours **leave**)

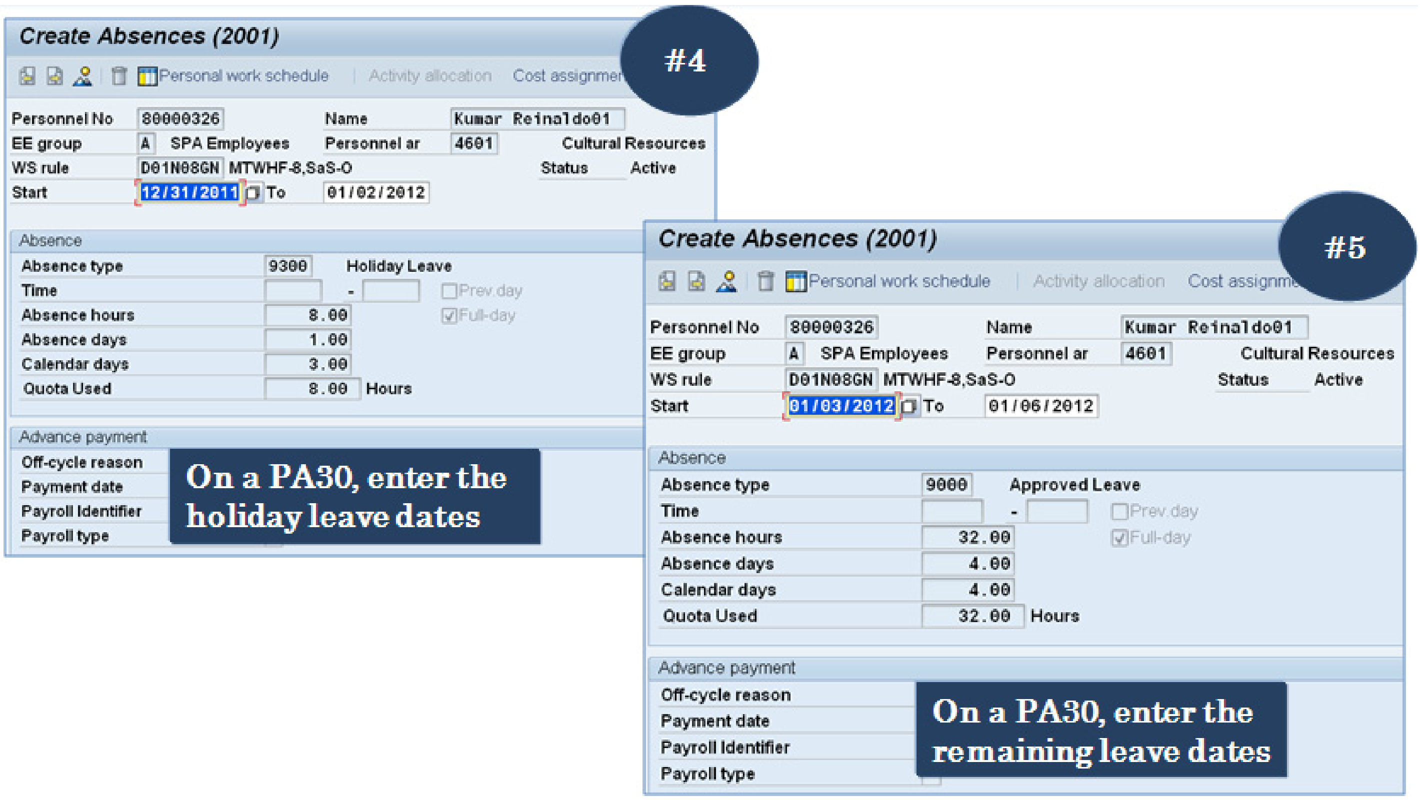
   By entering the dates above, the system calculates that four working days fall within the date range. The D01N08GN work schedule on IT0007 that was created issues a 5 X 8 work schedule for the employee; therefore, 32 hours default into the Absence hours field.

2. Create a PA30 to enter the first holiday period, IT2001, subtype 9300:

   Start: 12/26/2011 *To*: 12/27/2011 (24 hours **holiday**)

3. Create a PA30 to enter the next leave period **up to** the next holiday, IT2001, subtype 9000:

   Start: 12/28/2011 *To*: 12/30/2011 (24 hours **leave**)



4. Create a PA30 to enter the next holiday period, IT2001, subtype 9300:

   Start: 12/31/2012 *To*: 01/02/2012 (eight hours **holiday**)

5. Create a PA30 to enter the remaining leave, in this case 32 hours, IT2001, subtype 9000:

   Start: 01/03/2012 *To*: 01/06/2012 (32 hours **leave**)

By entering the data on the Absences infotype as explained in this manner, it is not necessary for a separate time sheet to be entered for the employee. If data is not entered on this infotype (nor a timesheet), the employee is on leave without pay.

Using leave accrued while out on leave

If an employee wants to use the time that was accrued while he or she was out on paid leave, you will have to create a new PA30 IT2001 in order to enter the new leave time. For example: An employee has 160 hours of approved leave. When the employee goes out on LOA, he/she wants to use the 160, plus the hours that are accruing while on leave. In this case, you would enter the 160 hours on IT2001 during the Action. After the employee has accrued the additional hours, you would create a PA30 for another IT2001 to exhaust the additional leave.

Position Infotypes - Employees and Time

POSITION INFOTYPE FLAGS	
Overtime Compensation	IT9005
Holiday Payout Period	IT9006
Night Shift Premium	IT9007
Evening Shift Premium	IT9008
Weekend Shift Premium	IT9009
Holiday Premium Rate	IT9010
On-Call	IT9011
Callback	IT9012
Weekend Nurse	IT9014
Extended Duty	IT9016
Gap Hours	IT9017

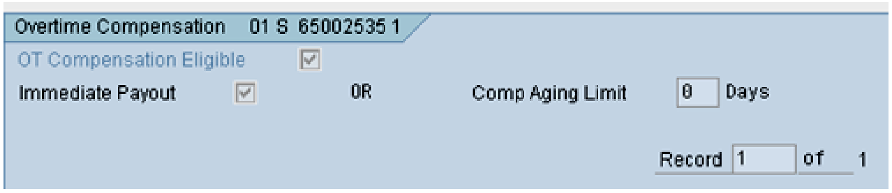
🗁 **NOTE**: If an infotype begins with **9**, it is a customized position infotype.

HR personnel that have access to **PO13D** screen to display the above infotypes on a position. If the position infotypes for the various types of pay are not flagged correctly, the employee will not receive the correct pay. The PO13D screen can be used as a tool to verify an employee's position settings if there is an issue with the employee's Shift Premium pay, Holiday Premium pay, etc.

With approval by the manager, the Classification Section can make the changes on the employee's record.

🗁 **NOTE**: It is important to understand that when a **position** setting is revised that is retro to a pay period prior to the current pay period, **BEST Payroll MUST be contacted** to let them know to run time eval on the affected employees retro to that same time period. BEST Payroll only needs to be contacted if a position is revised. If only time is revised on an employee, OSC HR/Payroll will automatically retro the time eval run.

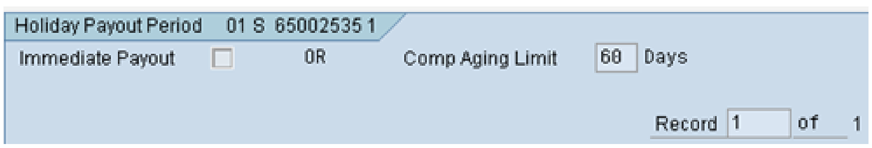
Overtime Compensation (IT9005)



If time worked beyond the overtime limit (40 hours, etc.) is to be paid or accumulated as compensatory time, the position must have a valid IT9005 record. The default is 365 days. If overtime compensatory time is to be paid out (FLSA Subject only) or expired (FLSA Not-subject only) at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). If it is to be paid out immediately, the Immediate Payout checkbox should be checked. The setting on IT9005 in conjunction with Time Transfer Specifications (2012) (discussed later) determine the rules around the overtime compensation.

As indicated previously, an employee may have worked over 40 hours and entered the hours on the time sheet and they may have been approved by the manager. But unless the position Overtime Compensation infotype is flagged correctly on the positions, the employee will not receive overtime compensation. An IT9005 record is not required if the position is not eligible for overtime pay or compensation.

Holiday Payout (IT9006)



If holiday compensatory time (equal time off for time worked on a holiday) is to be paid out at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). If it is to be paid out immediately, the Immediate Payout checkbox should be checked.

The default is 365 days. If no record exists, the default value of 365 applies.

Shift Premiums (Night, Evening, Weekend)

Positions eligible for any of the premiums listed below must have valid infotypes and do not exist unless specifically created for that position. When created, <u>10% is the default</u>.

Night Shift Premium (IT9007)

OSP approved rates other than the default of 10% must be entered in the rate field.

Evening Shift Premium (IT9008)

OSP approved rates other than the default of 10% must be entered in the rate field.

Weekend Shift Premium (IT9009)

OSP approved rates other than the default of 10% must be entered in the rate field.

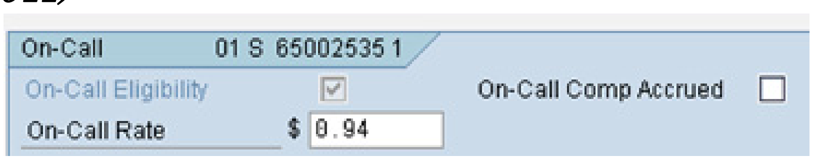
The various types of premium pay display as separate line items on the employee's pay stub only if the rates are different. For example, if an employee's evening and night shift are both 10%, the hours worked in the evening and night are added together on one "Shift Premium" line item on the pay stub with the rate of 10%. On the other hand, if the evening rate is 10% and the night is 15%, two separate line items will show with the hours entered for the evening separate from the hours entered for night.

Holiday Premium Rate (IT9010)

Positions eligible for a Holiday Premium Rate must have a valid and current IT9010.

IT9010 is only required if the Holiday Premium Rate is different than 50%. OSP approved rates other than the default of 50% must be entered in the rate field.

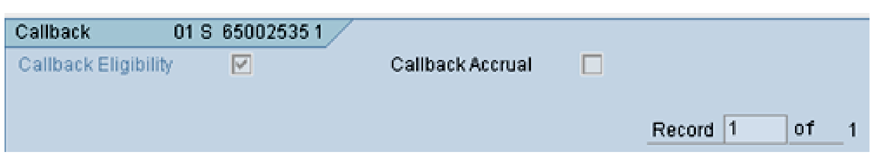
On-Call (IT9011)



Positions eligible for On-Call compensation must have a valid IT9011 record.

The accrued box should be checked if the time is to be collected as On-Call comp time. The rate field must be populated with the OSP approved on-call rate.

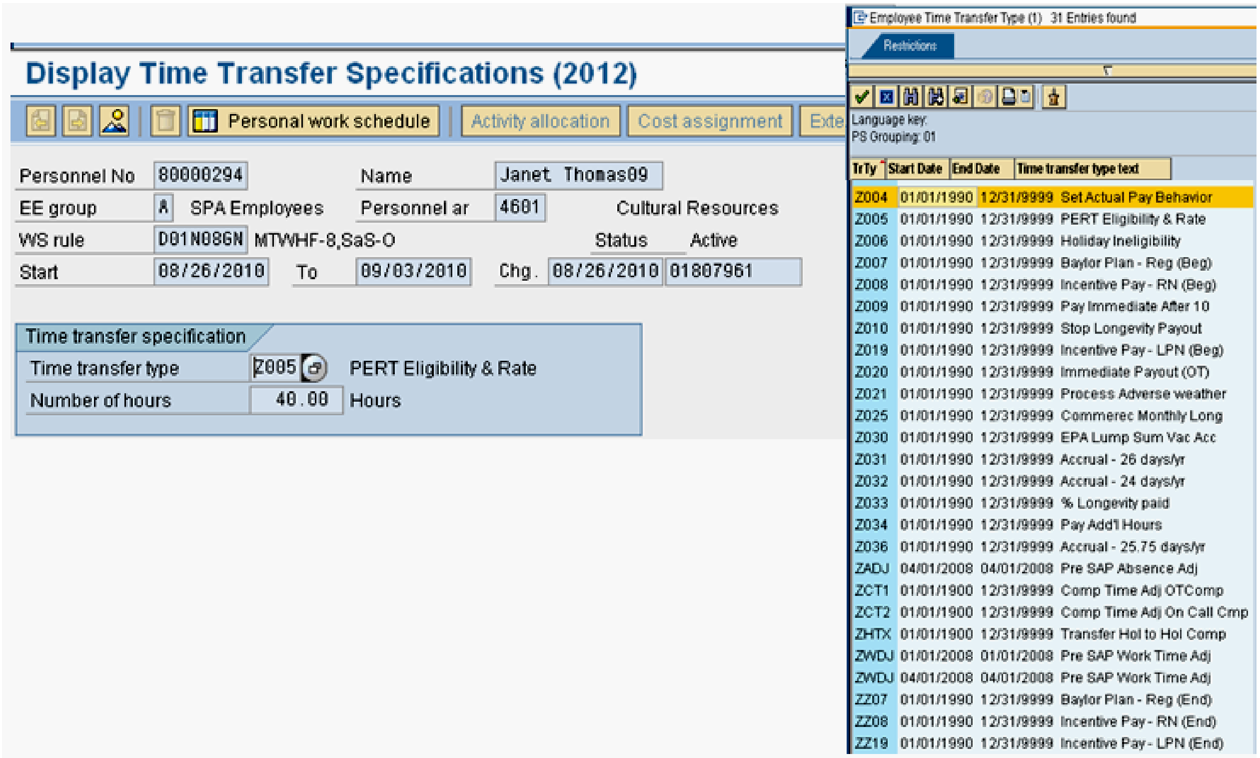
Callback (IT9012)



Positions eligible for Callback compensation must have a valid IT9012 record. The decision to pay versus comp time is determined by the Callback Accrual checkbox.

Information - The Callback Accrural is currently not working; however the OSC HR/Payroll system Time Production Support section is working to fix it.

Time Transfer Specifications (IT2021)



The "Time Transfer Specifications" infotype (2012) can be used to influence time management behavior and is typically applied to an employee by the Time Administrator. IT2012 records are created for specific employees for specific periods of time. As the HR Master Data Maintainer, it may be helpful if you understand the following subtypes for the time IT2012:

- Z005 - PERT Eligibility and Rate
  Applicable for Department of Public Safety employees eligible for PERT (Prison Emergency Response Team) premiums.

- Z009 - First 10 hrs Comp
  Applicable for subject employees who have a position with an Overtime Eligibility (IT9005) record that does not indicate "pay immediately". This subtype record will cause the additional hours worked beyond 50 in a week to be "paid immediately". The first 10 hours of additional time worked will be compensated with Compensatory Time at the appropriate rate.

- ZAWA or ZAWL
  Adverse Weather liability hours that have not been made up withing 365 days will result in an error message in Time Evaluation. An employee may elect to have overdue Adverse Weather hours recovered from Approved Leave or Leave w/out Pa. The Leave Administrator is responsible for creating the entries.

- ZLOSI / ZLOSD
  Length of service increase or decrease. This subtype record allows adjustments to be made to an employee's Length of Service value in addition to the IT0552's. BEST OM/PA are responsible for creating the entries.

EXERCISE 4.3: Display Position Settings

SCENARIO

You have been asked to verify the position settings on the Information and Communication Specialist II position.

Your manager wants to know:

— What is the EE Group/Subgroup assigned to this position?
— Is the position set up for On-Call? If so, what is the On-Call rate?
— Is the position set up for Night Shift Premium?

Instructions

1. Enter transaction code **PO13D** in the Command field and **Enter**.
2. From the table below, select the position number assigned to you by your instructor and enter it into the Position number field.

	POSITION #: *Information and Communication Spec. II*						
A	65002527	F	65002532	K	65002537	P	65002542
B	65002528	G	65002533	L	65002538	Q	65002543
C	65002529	H	65002534	M	65002539	R	65002544
D	65002530	I	65002535	N	65002540	Inst 1	65002545
E	65002531	J	65002536	O	65002541	Inst 2	65002546

3. Click **Enter**.
4. Use the scroll bar to locate and select the **EE Group/Subgroup** infotype.
5. Click the **Display (F7)** button.

   A What is the EE Group? ______________________

   B What is the EE Subgroup? ______________________

6. Click the Back (F3) button to return to PO13D.
7. Use the same process to display information related to the On-Call settings on the position.

   A Is there an On-Call setting on the position? ____________

   B If so, what is the On-Call rate? ____________

8. Click **Back** to return to PO13D.

9. Use the same process to check on the Night Shift Premium status.

   A Is there a Night Shift Premium infotype activated for this position? ____________

   B How do you know? ____

10. Click **Back** to return to PO13D.

This exercise is complete.

SUMMARY

In this lesson you learned to:

- Identify how PA Actions affect employee time and pay
- Describe how a work schedule assignment affects an employee's pay
- Revise a work schedule
- Create a substitution
- Revise the time settings on a position
- Explain when to notify payroll regarding changes in settings

HR Reports Overview

Objectives

Upon completion of this lesson, you should be able to:

- Identify the two applications that house reports
- Describe how to access reports in both applications
- Describe the available HR reports
- Add additional fields to a OSC HR/Payroll report
- Use multiple selections in a specific field
- Execute and view an OSC HR/Payroll HR report

Where to Find Reports

SAP	BI
Real time data *	Data at a point in time *
Transactional reports	Analytical reports
Performance considerations for large volumes	Aggregation of large data volumes
Data by functional area	Merge disparate data
Current data only	Include history data with current data

Human Resources reports are housed in both OSC HR/Payroll SAP system reports and Business Intelligence (BI). You can see in the comparison above the advantages of each reporting system.

🗁 ***** Many OSC HR/Payroll system transactions are posted at the time the entry is made. Therefore, when you run an OSC HR/Payroll SAP report, for example for today, the data is current including today's data. Data is loaded into BI daily; therefore when you run a report in BI, for example for today, you are actually viewing yesterday's data.

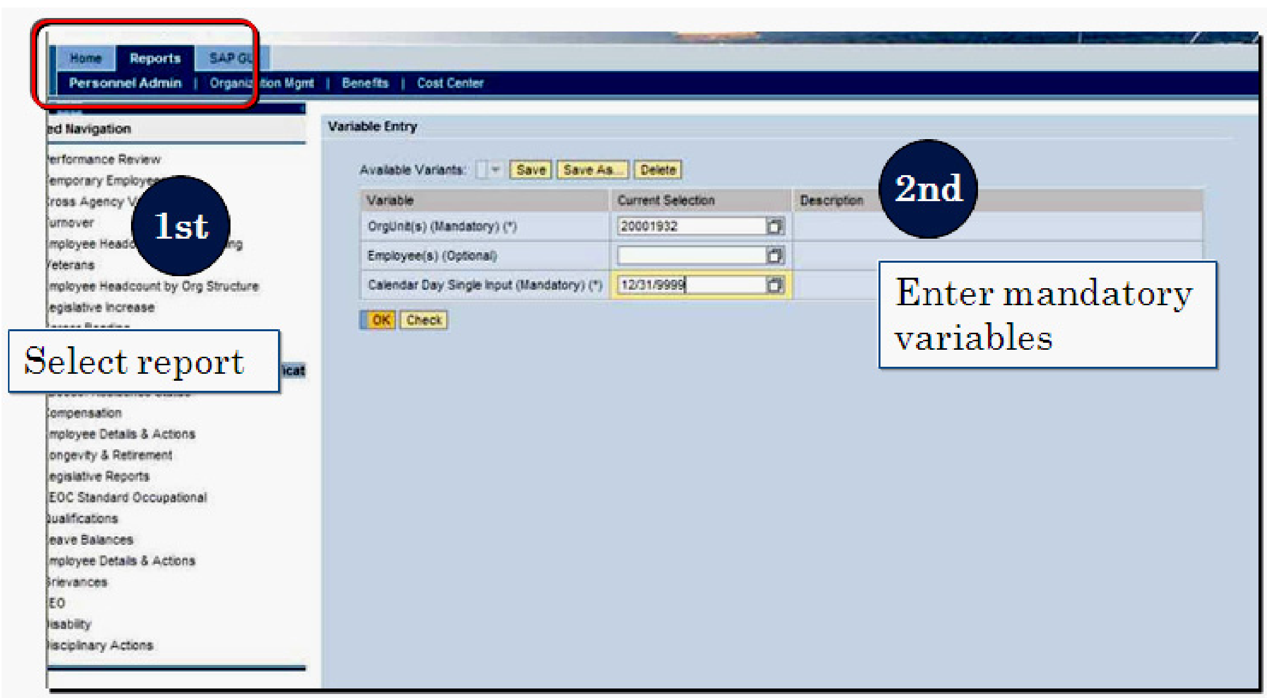
You can see a list of BI reports (and a description) by accessing the applicable job aid on the OSC Training HELP website.

A list of the SAP HR reports is available from the SAP reports menu.

Additional Resource
You can find several additional support materials about SAP ERP reports on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/index.html Follow the following path to access the latest version of the job aids: *ERP Reporting > Job Aids* • ERP Reports

For more information on reports, see the online reporting class.

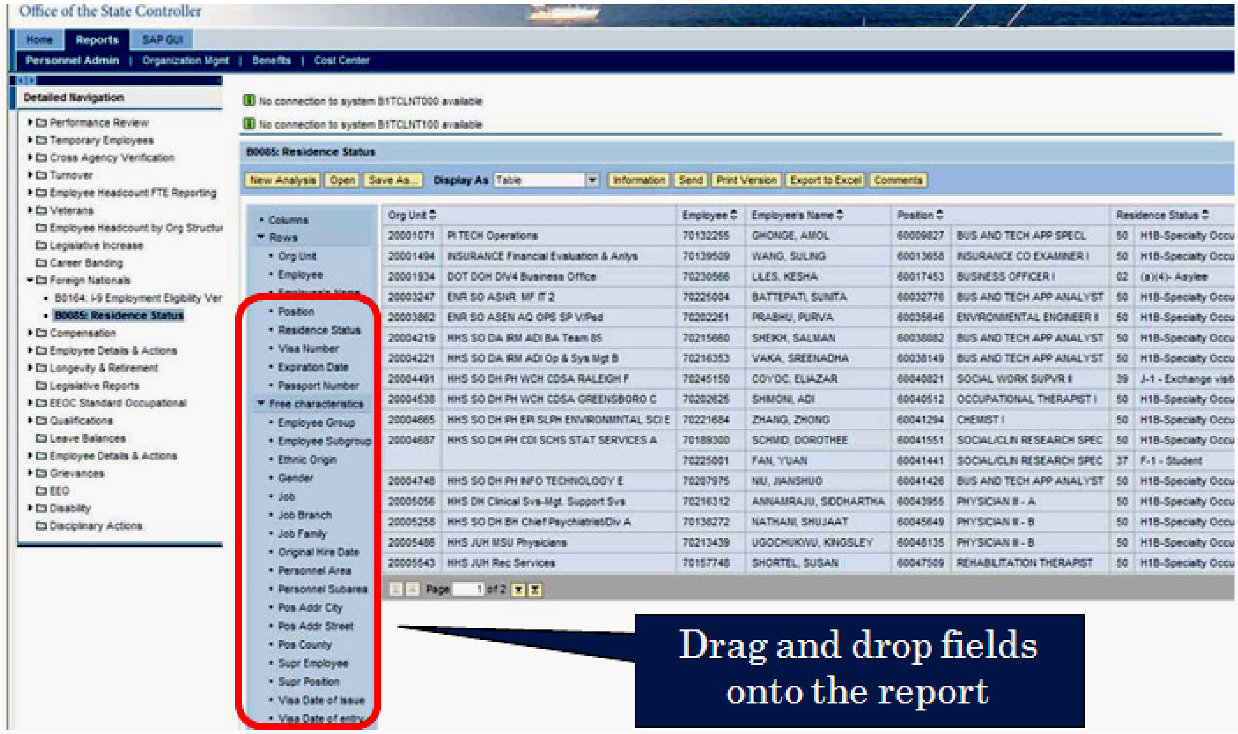
BI Reports



If you have security access to run BI reports, you will see a Reports tab on your portal.

On the initial screen, you first select the report name in the left panel.

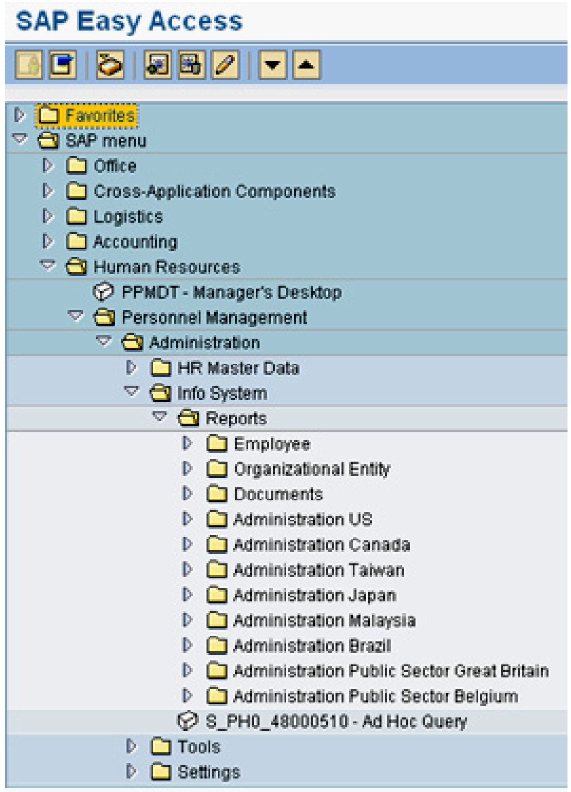
Next, enter the mandatory variables (Org Unit and date).



On the next screen, you can literally drag and drop any of the fields from the free characteristics list onto the report. The rows and columns above the free characteristics section automatically default into the report.

You can print the report, write comments, send to someone else, or export to an Excel spreadsheet.

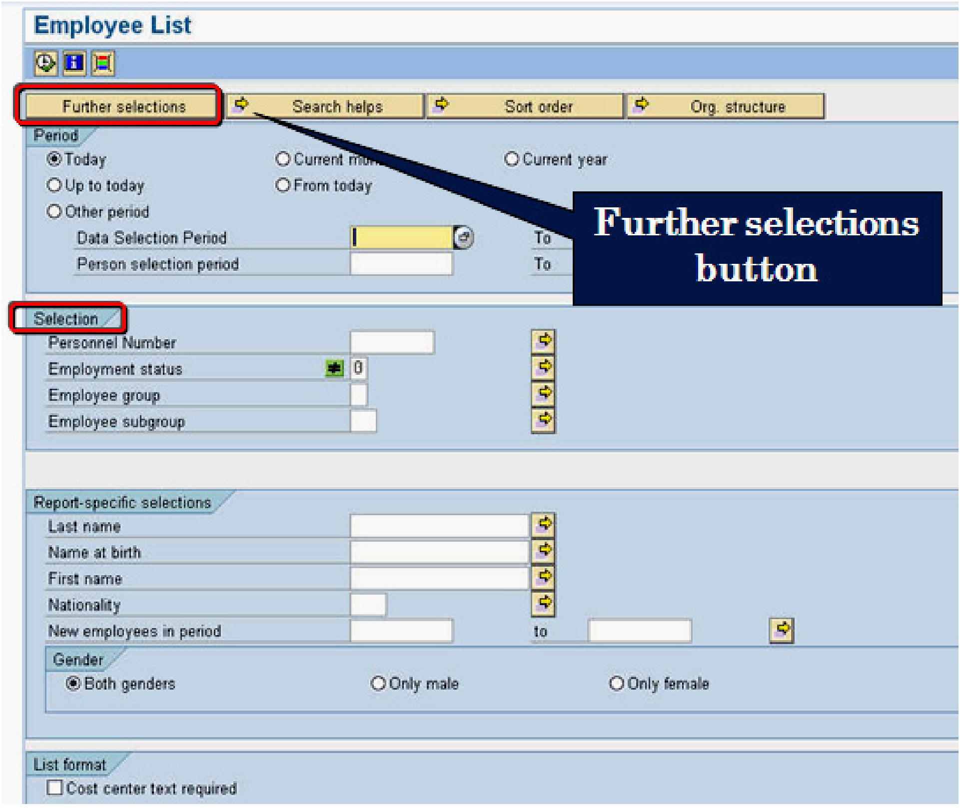
HR/Payroll ERP SAP Reports



The HR/Payroll ERP SAP reports are accessed via the Easy Access screen, or by using the applicable transaction code. The reports are categorized according to Employee, Organizational Management, Documents, Administration compliance and administration garnishments.

Since the report output is determined by your security role, you will only see those employees for which you have been given security access.

Entering Selection Criteria



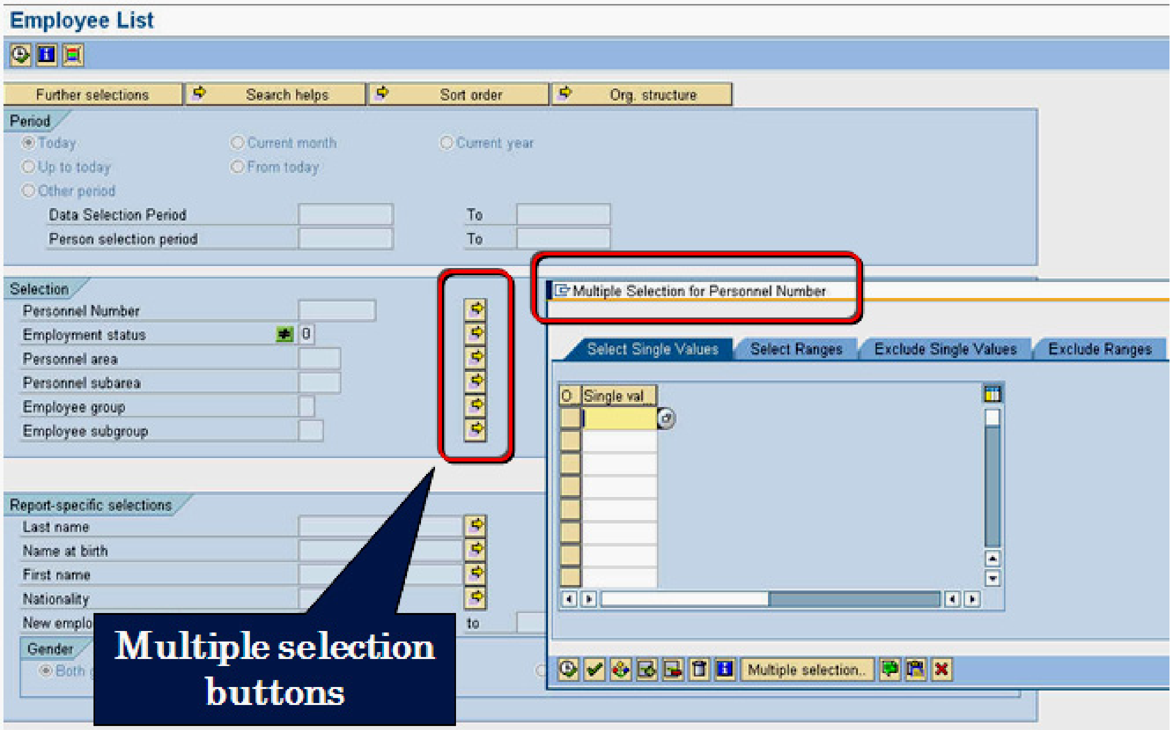
In the HR/Payroll system, the first screen of each report allows you to specify the data you want to view in a report. The type of fields that display on the selection screen differ for each report.

NOTE! You should never run the report without specifying the selection criteria. If you do not specify selection criteria, the HR/Payroll system must search through the entire database for the employees to which you have security access. If several people are running reports at the same time without any selection criteria, the capacity of the HR/Payroll system reporting system is unnecessarily taxed which could result in a slow response.

OSC HR/Payroll system reports have many options and functions. In this class, we only cover a few of them. The selection screen includes:

- **Period**: Select specific time frames that you want included in the report. To specify a specific date (or range), you must select the *other period* radio button and then enter the dates.
- **Selection**: In this area, you select the specific criteria you want included on the report, for example, personnel area, employee status, just to name a few.
- **Further selections button**: Use this function if you want to add, or remove fields to the Selection area. Observe in the illustration that the *Personnel Area* and *Personnel Subarea* fields are not present in the Selection area. You can use the Further selections button to add those fields to the screen.

Using Multiple Selections



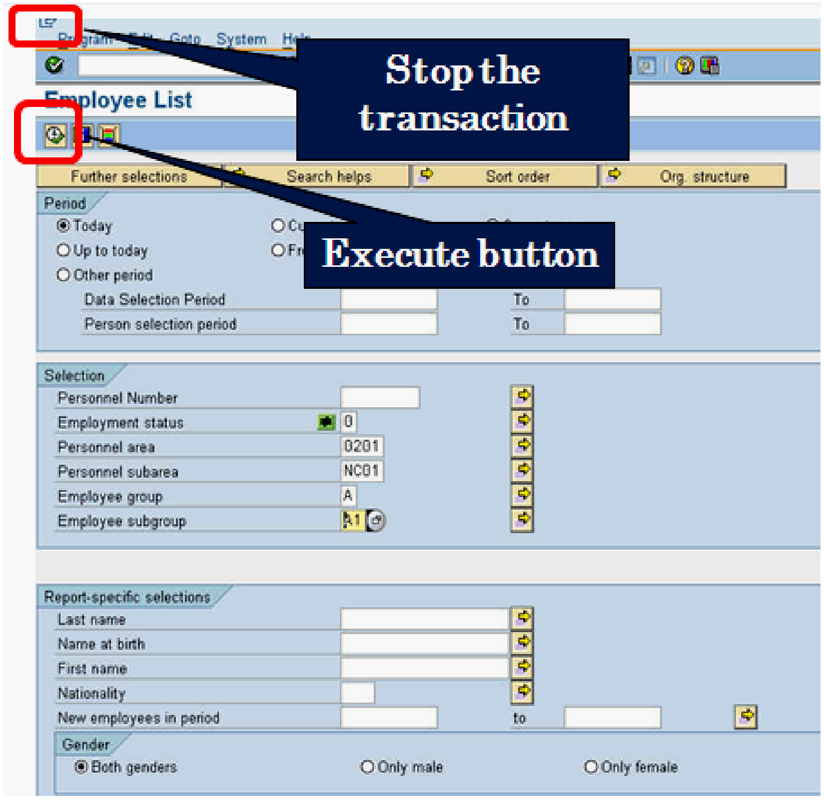
The yellow arrows beside each field are called **multiple selection** buttons. When you click the arrow, a new window is displayed. On that window, you can use the tabs to indicate :

- Additional single criteria
- A range of criteria
- Single criteria to exclude
- A range of criteria to exclude

Observe in the illustration above that the **Selection** button was used to add the Personnel Area and Personnel Subarea fields. They now display on the screen as fields to be used for selection criteria.

Entering the appropriate selection criteria is key to getting accurate report results. For example, if you narrow your selection criteria too small, you may get a message that there are "no values".

Executing a Report



When you have entered all of the selection criteria, click the **Execute** button to run the report.

🗁 **NOTE**: Sometimes when you are running a report, or performing other transactions, the system may appear to be taking an inordinate period of time. You can stop the transaction by clicking the icon at the top left of the screen, and selecting **Stop Transaction** from the menu.

* *

EXERCISE 5.1: Employee List Report

SCENARIO
Use OSC Text paragraph style

Instructions

For this exercise use the menu and select Employee List.

1. From the Easy Access screen, select **SAP menu** > **Human Resources** > **Personnel Management** > **Administration** > **Infosystem** > **Reports** > **Employee** > **Employee List**

2. Select **today's date**.

3. Look in the Selection area of the screen. You will add or remove fields as needed.

4. Click the **Further Selections** button and do either both or one of the following as necessary:
   - If Personnel Area and Personnel Subarea on are not on the screen, select them from the left column, and then add them.
   - If Employee Group and Employee Subgroup are on the screen, select them from the right column, and remove them.
   - Add the Org Unit.
5. Click the **Continue** button.
6. In the Personnel Area field enter **4601-Cultural Resources**.
7. In the Personnel Subarea field enter **NC01**.
8. Click the **Execute** button.

Review the results of your data query.

This exercise is complete.

* *

SUMMARY

In this lesson you learned to:

- Identify the two applications that house reports
- Describe how to access reports in both applications
- Describe the available HR reports
- Add additional fields to a OSC HR/Payroll report
- Use multiple selections in a specific field
- Execute and view an OSC HR/Payroll HR report

Course Review

Objectives

Upon completion of this courese, you learned to:

- Recall terms and concepts from the course, *Personnel Administration Terms, Concepts and Display Data*
- Modify existing employee data
- Create an adjustment for benefits
- Describe the relationship between PA infotypes, Payroll and Time
- Update an employee's schedule and position settings
- Identify the options to access reports

Next Steps

- Monitor the HR/Payroll System communication
  - BEST Shared Services web site (especially the Updates tab)
    URL: http://www.osc.nc.gov/BEST/index.html
  - BEACON Training website: **What's New** link
    URL: http://www.osc.nc.gov/beacon/training/whats_new.html
- Review conceptual materials
- Access the Training HELP site
  URL: http://www.osc.nc.gov/training/osctd/help
- Practice what you've learned
  URL: http://mybeacon.nc.gov
  - Client 899
  - Use your current NCID user name and password

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

🗁 Follow the link provided above to access the training client through the HR/Payroll Portal. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance?

Remember to access the Training HELP website when you need assistance in completing transactions. As stated above, the work instructions can be accessed on line through the web link in the steps above.

Course Assessment/Evaluation

Follow the instructions given by your instructor to complete your evaluation of today's class in the Learning Management System (LMS).

🗁 Don't forget to click the SUBMIT button---***TWO DIFFERENT TIMES***!

CONGRATULATIONS!

You've completed the course!