

# HRMS End User Training



**Basic: Employee Hiring & Processing**

**Training Guide**



Revised: January 2010

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# **Ground Rules**

- Let's work together to make class enjoyable and keep on schedule:
  - Turn cell phones and pagers to vibrate or off
  - Participate to the fullest of your ability
  - Respect break start and end times
  - Share experiences and ideas
  - Ask questions
  - Maintain focus
  - Avoid side conversations
  - Do not check your e-mail or otherwise use the Web unless we are on a designated break

# Introductions

- Please share the following information with the class:
  - Name
  - Agency
  - HRMS Role
  - Goals for the class

# **Training Materials and Tools**

The following training materials and tools are used:

- **HRMS Training Guide:** Designed to introduce you to basic HRMS navigation terms and concepts and to provide the necessary information to complete the activities and exercises throughout the course.
- **HRMS Activity Guide:** Designed to provide you with activities and exercises that help solidify your understanding of concepts learned in the course and also provide you with an opportunity to use HRMS.
  - Activities include Demonstrations, Walkthroughs and Exercises.

# Job Aids

The following job aids are available to you and are applicable to Employee Hiring and Processing:

- **Employee Hiring and Processing**
  - Infotypes
  - Reason Codes
  - Transaction Codes
  - Reports
- HRMS Basic Navigation
- General Reporting
- Accessing HRMS

The screenshot shows a web page from the Washington State Department of Personnel. At the top, there's a navigation bar with links for Contact DOP, About Us, Topic Index A-Z, Forms, Publications, and Calendar. Below the navigation is a search bar and a green 'GO' button. The main content area has a yellow background. On the left, there's a sidebar with a green header 'Payroll - HRMS' containing links to HRMS Support, Payroll Calendars & Schedules, Training, and On-Line Quick Reference. The main content area has a yellow header 'Job Aids' with a sub-header 'HRMS End User Job Aids'. It describes the purpose of the job aids as providing quick-reference guides for end users. To the right, there's a 'Contact Us' box with the phone number 360-664-6400 and an email link. At the bottom, there's a table titled 'Job Aids' with columns for Name, Format (PPT or PDF), and Date.

Job Aids	Format	Date
Access HRMS	PPT PDF	4/04/07
Basic Navigation	PPT PDF	4/04/07
Employee Hiring and Processing	PPT PDF	1/22/08
Financial Reporting	PPT PDF	5/14/07
Garnishments	PPT PDF	1/16/08
General Reporting	PPT PDF	4/04/07
HRMS Benefits	PPT PDF	1/23/08
HRMS Payroll and Reports	PPT PDF	9/29/08

website address: <http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference>

# On-line Quick Reference

**OLQR is an acronym for the On-line Quick Reference tool.**

It contains a glossary, job aids, system and user procedures that describe how to perform HRMS tasks step-by-step.

The screenshot shows the Washington State Department of Personnel website. At the top, there is a navigation bar with links to Contact DOP, About Us, Topic Index A-Z, Forms, Publications, and Calendar. Below the navigation bar is the department's logo, "HR Washington State Department of Personnel". The main menu includes Home, Strategic HR, Compensation & Job Classes, Training, Recruitment, Rules, Diversity, Payroll, and More DOP Services. The current page is Payroll - HRMS, with sub-links for HRMS Support, Payroll Calendars & Schedules, Training, and On-Line Quick Reference. The main content area is titled "On-Line Quick Reference" and describes the tool as containing instructional materials to help users perform day-to-day tasks in the Human Resource Management System (HRMS). It is organized by functional areas and roles, job aids, HRMS reports, user procedures, course manuals, and a glossary. A sidebar on the right is titled "Related Documents" and lists "HRMS Upgrade Impacts". Another sidebar titled "Contact Us" provides the phone number 360-664-6400 and an email link. At the bottom of the page, it says "Updated: 3/9/09".

website address: <http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference>

# HRMS Data Definitions

HRMS Data Definitions website provides agencies with standard definitions of HRMS fields names and dropdown list options.

The screenshot shows the "Payroll - HRMS" section of the OLQR. The left sidebar lists links: HRMS Support, Payroll Calendars & Schedules, HRMS Training, On-Line Quick Reference (which is the current page), and Personnel/Payroll Association. The main content area is titled "On-Line Quick Reference" and describes the OLQR as containing instructional materials for day-to-day tasks in the HRMS. It lists functional areas and roles, job aids, HRMS reports, user procedures, course manuals, and a glossary. A red box highlights the link "HRMS Data Definitions Project » - New!". The bottom features a search bar and a magnifying glass icon.

website address:

<http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/HRMSDataDefinitions.aspx>

# HRMS Support

The HRMS Support website is a point of contact for internal and external clients of DOP's Information systems, websites and internal networks.



The screenshot shows the homepage of the HRMS Support website. At the top, there is a green header bar with the Washington State Department of Personnel logo and a search bar. Below the header, a large orange navigation bar contains links for Home, Strategic HR, Compensation & Job Classes, Training, Recruitment, Rules, Diversity, Payroll, and More DOP Services. A "Print Friendly" link is also present. The main content area features a large image of a smiling woman. Above the image, the text "Home > Payroll" is displayed. The page title is "Payroll". Below the title, there are several sections with links:

- Employee Self Service »
  - Log on to Employee Self Service to view your earnings statement, update personal information, and apply for jobs
  - View first-time log on instructions (PDF file)
  - View Tips & Help
- Human Resource Management System »
  - HRMS Support
  - Training
  - On-Line Quick Reference
  - Personnel/Payroll Association
- Calendars and Schedules »
  - Employee Payday and Holiday Calendar
  - HRMS Payroll Calendar
  - HRMS Production Hours of Operation
- Payday FYI »
  - Current Payday FYI Announcements
  - About Payday FYI
  - Archived Announcements
  - How to Send a Payday FYI

website address: <http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference>

# HRMS Message Center

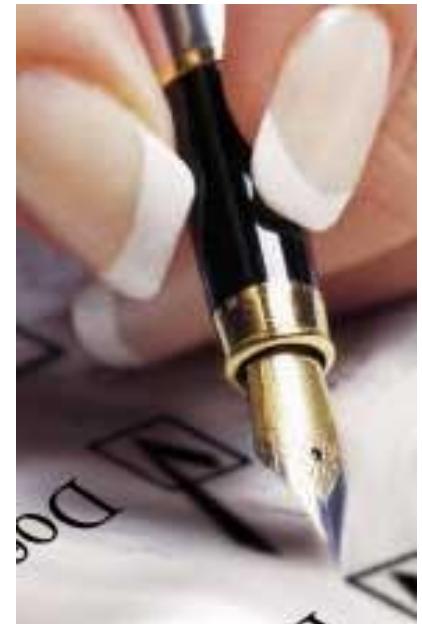
- When an issue or update needs to be communicated to HRMS users, HRMS Support transmits a ZAlert that instructs user to access the HRMS message center for an update.
- Messages can be accessed through the HRMS Support website <http://www.dop.wa.gov/hrms/HRMSSupport/Pages/MessageCenter.aspx> or through the OLQR.

The screenshot shows the HRMS Message Center page. At the top, there's a navigation bar with links to Contact DOP, About Us, Topic Index A-Z, Forms, Publications, and Calendar. Below that is a search bar with a 'GO' button. The main menu includes Home, Strategic HR, Compensation & Job Classes, Training, Recruitment, Rules, Diversity, Payroll, and More DOP Services. The Payroll link is highlighted. The breadcrumb trail shows Home > Payroll > Human Resource Management System > HRMS Support > Message Center. There's also a 'Print Friendly' link. On the left, a sidebar for 'Payroll - HRMS' lists HRMS Support, Payroll Calendars & Schedules, Training, and On-Line Quick Reference. The main content area is titled 'Message Center' and explains that it provides system related messages for professional users. It mentions that urgent issues or updates are communicated via ZAlerts. A list of message types includes notifications of issues requiring immediate action, system updates, and changes in system availability. To the right, a 'Related Documents' section lists archived messages for various months and years, such as July-Oct 2008, Jan-June 2008, Nov-Dec 2007, Jun-Oct 2007, Jan-May 2007, and Mar-Dec 2006. A 'Contact Us' section at the bottom provides the phone number 360-664-6400 and an email link. The footer contains a Date/Time field and a 'HRMS Message Log' link.

# Course Objectives

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

- Understand the key components and terms of Personnel Administration.
- Hire and rehire an employee using Human Resource Management System (HRMS).
- Display and change employee information.
- Process an Employee Appointment Change.
- Process a Leave of Absence.
- Perform an Employee Separation.
- Process a Change of Status.
- Perform Extended Personnel Administration Scenarios.
- Process Personnel Administration Reports.



# **Personnel Administration Overview**

# **Personnel Administration Overview**

- Upon completion of this section, you will be able to:
  - Explain the Personnel Administration components.
  - Define Personnel Administration roles as they relate to the course.
  - Identify other HRMS modules that share integration with Personnel Administration components.

# Key Terms

## Integration

The ability to share data with other HRMS components.

## Effective Dating

This is the date which data on the infotype becomes valid. It is based upon a valid start and delimit date.

## Infotype

This is a screen that is used to enter employee information and to group related data fields together.



# **Key Terms – cont'd**

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## **Personnel Action**

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Processes used to record personnel events such as hiring, appointment change or separation.

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## **Transaction**

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Is composed of one or more screens and is a process that an end user performs to complete a business task, such as displaying employee information.

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# **Personnel Administration Roles**

- The employee's appointed position determines what role is assigned and the level of HRMS access available.
- The following roles exist for Personnel Administration:

<b>Personnel Administrator Processor</b>	Creates and maintains employee new hire and rehire information, appointment changes, separations, extended leave of absences and runs reports.
<b>Personnel Administrator Inquirer</b>	Views employee's information once entered into HRMS.
<b>Personnel Administrator Supervisor</b>	Provides oversight for the Personnel Administration Processor and Inquirer as well as running reports.

# Integration With Other HRMS Components

- HRMS is an *integrated* system, with the ability to share data with other HRMS components.
- It allows real-time transmission from Personnel Administration to:
  - Organizational Management
  - Time Management
  - Payroll
  - Benefits



# Integration With Other HRMS Components



- Key handoffs must occur between the different roles – for example:
  - Personnel Administration to Payroll
    - Information provided during hiring is transferred to payroll in real-time, qualifying a new employee for immediate payroll processing.
    - Department of Personnel recommends entries in HRMS be completed by DAY 3 of the [Payroll Processing Cycle](#).

# **Benefits of HRMS**

- Facilitates data consistency and allows for data maintenance to be shared across other modules.
- Employee actions are dynamically linked.
- Provides the ability to enter employee changes prior to the action effective date (effective dating).
- More accurate data and reporting capabilities (i.e. on demand and can be exported to Excel).
- When employees have Appointment Changes between agencies, their benefits, leave balances and banking information will come over to the new agency.
- HRMS keeps a historical record of an employee's information.

# Effective Dating

- HRMS allows you to enter an “ \_\_\_\_\_ ” when creating infotype records.
- You can enter information into HRMS at any time, before or after the employee information changes.
- The effective date is based upon a valid \_\_\_\_\_ date and a valid \_\_\_\_\_ date.

**Note:** The end date might default to 12/31/9999. Verify the desired end date prior to saving the action.



# **Effective Dating – New Hires and Appointment Changes**

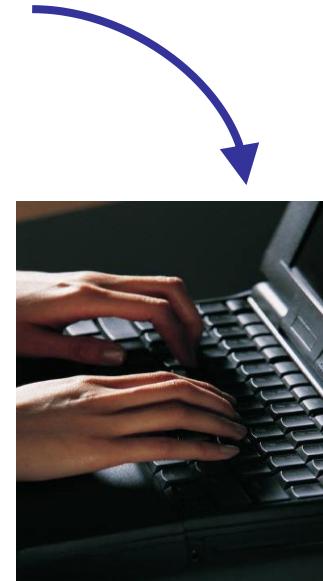
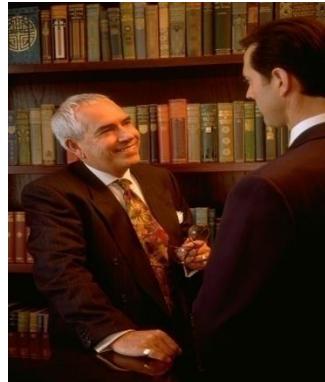
Use CAUTION when using effective dating on New Hires and Appointment Changes.

- Although effective dating is beneficial to agencies, be aware that back-dating could adversely affect other components in HRMS.
- If the employee did not start on the date that was entered into HRMS, there are procedures in the OLQR that outline specific scenarios.
  - By back-dating an employee's personnel action it can cause complications in payroll if it has been processed and even if the employee has no earnings for that pay period.

# Effective Dating Example

June 5<sup>th</sup> – Marsha, the Personnel Administration Processor, receives notification of Kevin's retirement scheduled for July 31<sup>st</sup>

June 1<sup>st</sup> – Kevin gives a letter to his immediate supervisor that outlines a retirement date of July 31<sup>st</sup>



June 8<sup>th</sup> – Marsha enters Kevin's retirement into HRMS to become effective on July 31<sup>st</sup>

July 31<sup>st</sup> – Kevin retires with no data entry needed as HRMS activates retirement based on effective data entered on June 8<sup>th</sup>

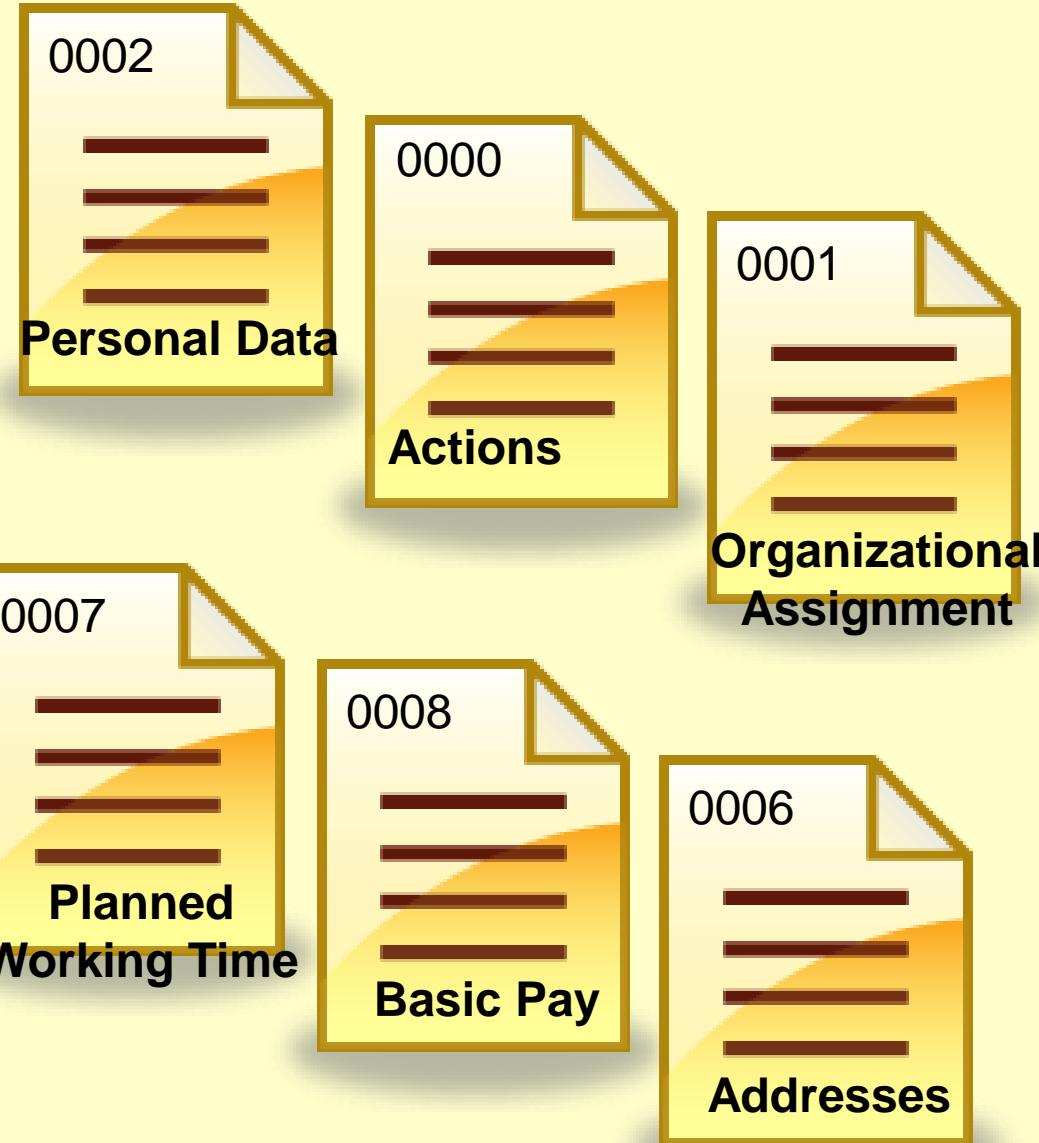
# Infotypes

- An ***infotype*** is a screen within a transaction in which specific criteria is entered into individual employee files or records.



- Infotypes are like documents in an employee's (electronic) personnel file.
- The infotypes are guided by your assigned role and are determined by the action you are performing.
- During a ***personnel action***, infotypes are grouped together to help navigate from screen to screen.
  - Therefore, there is no need to worry about missing required data fields.

# Infotype Examples



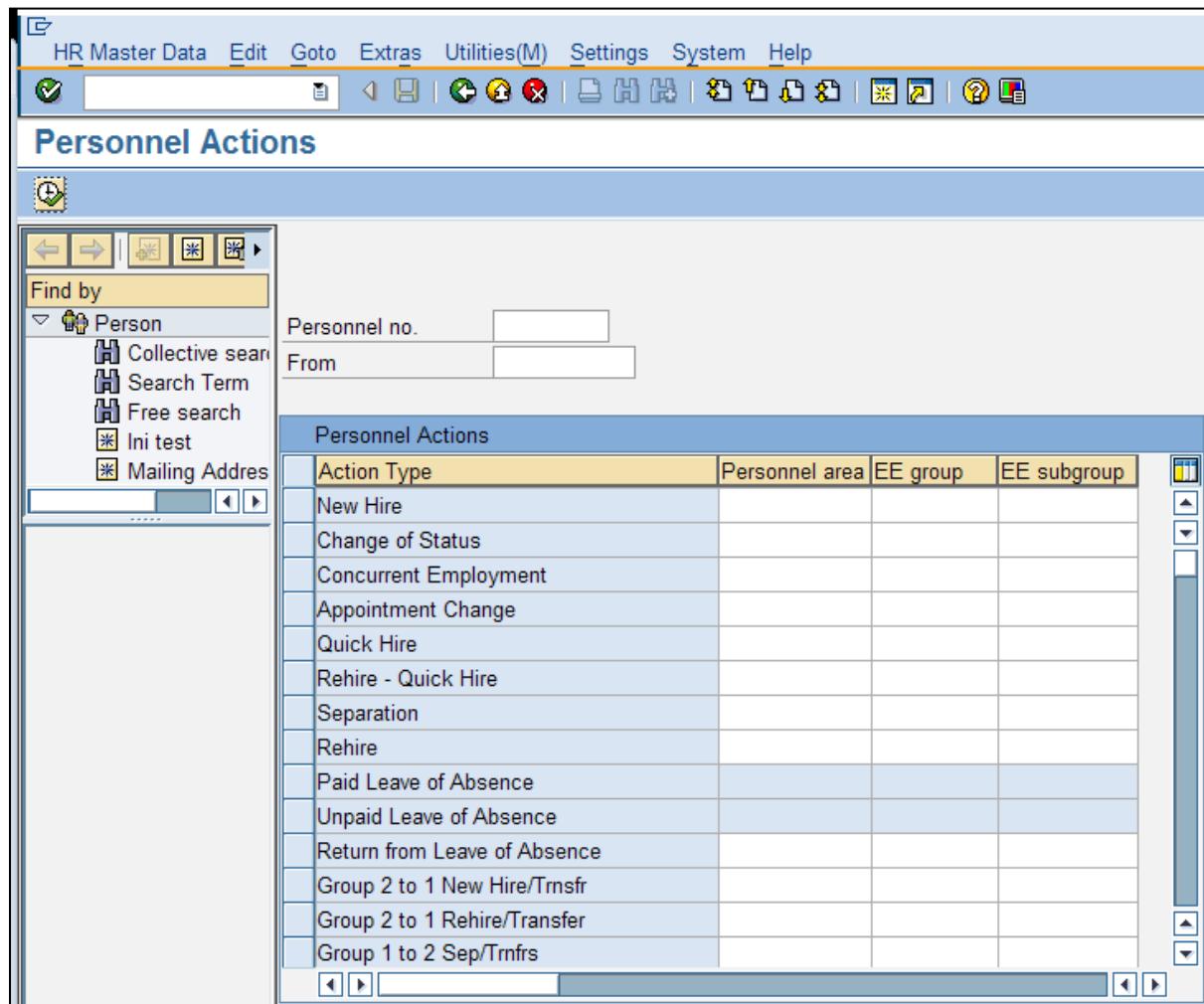
# Personnel Actions

- \_\_\_\_\_ are processes used to record personnel events such as hiring, appointment change or separation.
- Each personnel action contains a set or group of infotypes that record all the information necessary for an event to be recorded.
- For example, the New Hire action contains linked infotypes that walk you through entry of employee information.
  - The State defines the order in which you access infotypes.
  - Infotypes you access display in consecutive order until all required data is entered.



# Accessing Personnel Actions

- The menu of *Personnel Actions (PA40)* allows you to choose the action you want to complete.
- The action you choose prompts you to complete the required information for that action.



# Transactions

- A \_\_\_\_\_ is a process that an end user performs to complete a business task, such as displaying employee information. Each transaction has a specific business purpose.
  - For example, one transaction may be assigned to a report you need to run, another to a screen that allows you to enter an employee's education level, and another to the Employee Hire action.
- Each transaction is assigned a transaction code that you can use to quickly access the transaction.

# Review Questions

1. What three roles are part of the Personnel Administration?

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2. Each transaction is assigned a \_\_\_\_\_?

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3. This HRMS feature allows information to be entered into the system at any time by using a valid start and delimit (end) date.

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# **Display and Maintain Employee Master Data**

# **Display and Maintain Employee HR Master Data Overview**

Upon completion of this section, you will be able to:

- Explain the overall business process flow associated with the Display actions and the Maintain actions.
- Describe the differences between the Display actions and the Maintain actions.
- Review the Display, Copy, and Change Functions and understand the importance of the information in each infotype.

# **Key Term**

## **Master Data**

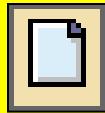
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This is essential personnel information that includes personal and organizational data which is unique to each employee.

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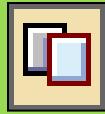
# Function Keys



## Create

- Creates a new infotype record

- Use the **Create** function when creating new infotypes outside of using personnel actions. Maintains data history.



## Copy

- Creates a new infotype record

- Use the **Copy** function to 'copy' existing infotype records and make changes in the appropriate infotype fields. Maintains data history.

# Function Keys – cont'd



## Delimit

- Creates a new infotype record

- Use the **Delimit** function to put a start and stop date on the record, but maintain the history of former records. Maintains data history.



## Change

- Correcting errors

- Use the **Change** function to replace the previous infotype. Does not maintain data history.

# Accessing Infotypes – Display and Maintain

- HRMS allows you to update infotypes while keeping a history to the infotype.
- There are two ways to update/maintain infotypes:
  - Maintain (**PA30**)
    - Update specific infotypes one at a time.
  - Personnel actions (**PA40**)
    - Use to process personnel actions such as a New Hire which groups the necessary infotypes needed to process the action.
- You can also view employee information:
  - Display (**PA20**)
    - View infotypes one at a time.
  - Personnel File (**PA10**)
    - View the entire employee's record.



# Audit Tool:

## Logged Changes in Infotype Data report

- Helps identify data changes according to personnel numbers, Infotype and/or date and time.
- Run this report daily as an audit resource tool.
- Refer to the OLQR User Procedure: [\*\*Logged changes in infotype data\*\*](#)
- Access the Logged Changes in Infotype Data by using the transaction code **S\_AHR\_61016380**

# **HRMS Activity**



**Maintain Employee Master Data**

# Review Questions

## ■ Match the icon to its function:



**Change** – To change the record with no history.



**Overview** – To view all actions associated with an infotype.



**Copy** – To update the record while keeping a history.

## ■ In most circumstances, should you use the Copy or Change action to update employee information?

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# New Hire

# New Hire Overview

Upon completion of this section, you will be able to:

- Identify the structure of a personnel action.
- Explain the overall business process flow associated with the Employee Hire action.
- Navigate through the Employee Hiring infotypes and understand the importance of the information in each infotype.
- Complete a New Hire action in HRMS.

# Key Terms

## Personnel Number

The unique identifying number for an employee.

## Reference Personnel Number

Is a link between two personnel numbers and allows the employee to share certain infotypes such as Addresses (0006).

## Next Increase

This is the date of the next scheduled increase in pay. This is also known as the periodic increment date.



# Personnel Number

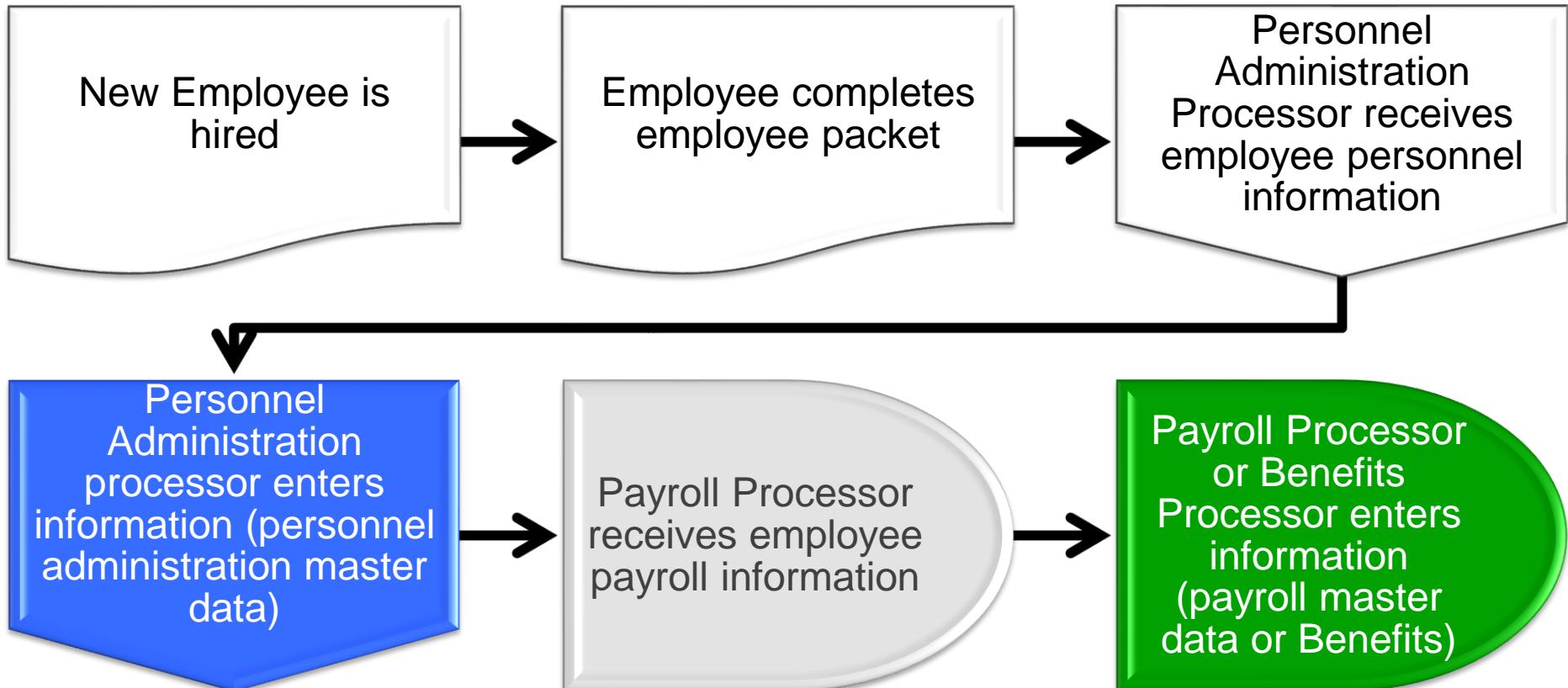
- \_\_\_\_\_ are automatically assigned to an employee and they are never repeated. All previous employees prior to conversion have been assigned a Personnel Number through Data Warehouse or HRMS.
- New Employees are assigned new Personnel Numbers.
  - They have never worked for the State of Washington.
  - They were previously employed with the State of Washington, but prior to HRMS being implemented.

**Note:** Be sure to check the Data Warehouse for employees who have worked with the state in the past and HRMS for those who may have already been entered in the system.

# Personnel Number – cont'd

- Employees may have two 'active' assigned personnel numbers simultaneously. This is known as concurrent appointment. (See Extended Scenarios – Section 14 for more information)
  - Concurrent employment is necessary when one appointment (or position) is hourly and the other appointment is salary (monthly).
- During a concurrent appointment the employee is assigned a Primary personnel number for one agency (or position) and a **\*reference personnel number** for the other.

# New Hire Process Flow



## Legend



Business Process



PA Processor  
Role



HRMS  
Entry



Payroll Processor  
Role

# Hire a New Employee

- Use the Hire action to enter information for an employee that does not already exist in HRMS.

Note: If the employee already has a personnel number in HRMS, use the Rehire action.

- For example, DOT hired Robb and he has worked for DSHS a year ago. After searching, you find he has a Personnel Number. Enter Robb as a Rehire using the personnel number already assigned to him.
- The Hire action moves you through each infotype which requires certain information to hire an employee.



# New Hire

- A newly hired employee is considered a “new hire to state employment” **OR** an employee who has worked in the past, but their information did not convert over when HRMS was implemented.
- One person can be assigned two positions within an agency (multiple appointments).
- Information is entered in a string of consecutive infotypes.

# New Hire – cont'd

- Individual agencies have the capability to run reports, access data, and maintain information.
- You can enter information into the system prior to or after the effective date of the action.
- Based on the employee's compensation structure, HRMS is able to process their **Next Increase** automatically on *Basic Pay* (0008).
  - The **Next Increase** (also known as the periodic increment date) is the date of the next scheduled increase in pay. (See Extended Scenarios – Scenario 12 for additional information)

# Hire Types

The following hire types are most commonly used when hiring employees:

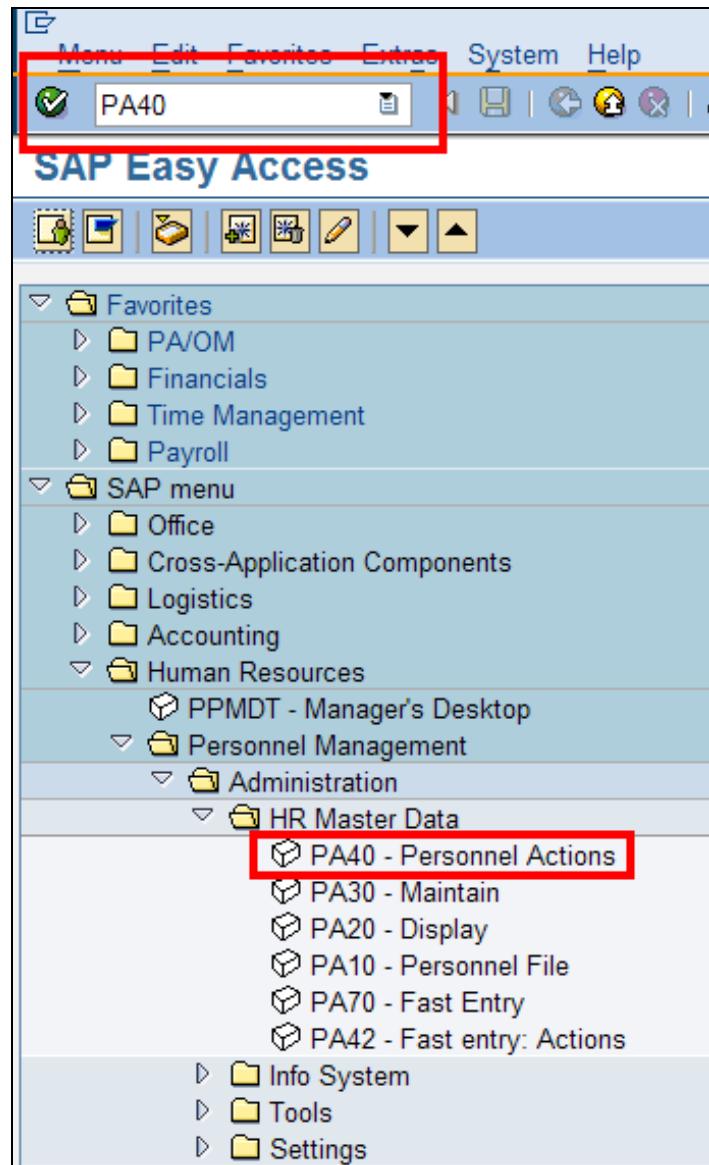
- \_\_\_\_\_ – An employee hired under the context that they are fulfilling a job on a time restricted basis.
- \_\_\_\_\_ – An employee hired under the context that they are fulfilling a job on a permanent basis. However, due to State of Washington requirements, they must fulfill the mandatory probationary period prior to being classified as permanent.
- \_\_\_\_\_ – An employee hired into a level in a lower classification as the position. The employee works “in-training” for the level opening for a particular period of time.

# Hire Infotypes

- Create the following infotypes during the Hire action including:
  - *Actions* (0000)
  - *Personal Data* (0002)
  - *Organizational Assignment* (0001)
  - *Contract Elements* (0016)
  - *Monitoring of Tasks* (0019)
  - *Addresses* (0006)
  - *Planned Working Time* (0007)
  - *Education* (0022)
  - *Date Specifications* (0041)
  - *Additional Personal Data* (0077)
  - *Military Status* (0081)
  - *Create Time Specifications / Employment* (0552)
  - *Basic Pay* (0008)

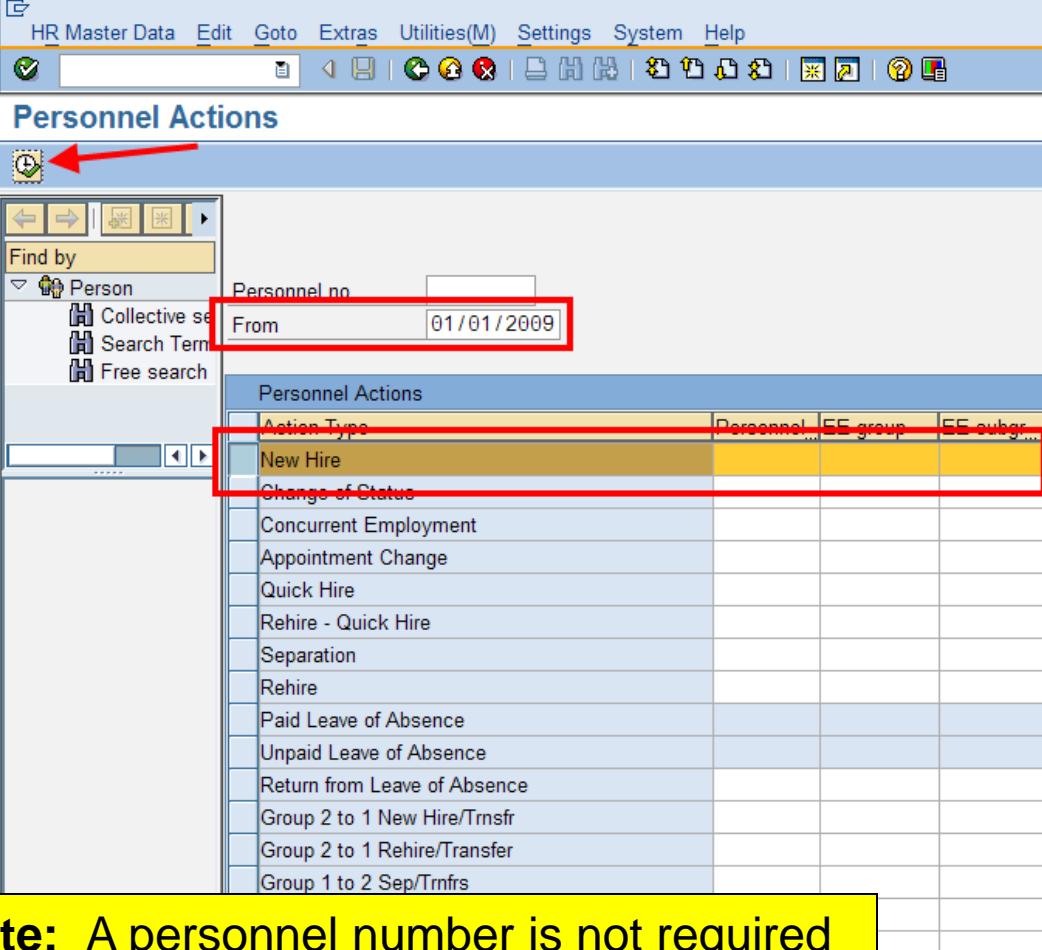
# New Hire Action

- To create a Hire Action using the menu path:
  - Follow Human Resources  
→ Personnel Management  
→ Administration → HR Master Data → Personnel Actions
  - Or enter transaction code **PA40** in the **Command field**
- Using the action will ensure that all required infotype records are created.



# New Hire Personnel Action

- During the hire action, the system assigns the new employee a unique number.
- Field to complete:
  - **From** (Date of Hire)
    - Example: 01/01/2009
- To access the Hire action, click the box to the left of New Hire.
- Click  (**Execute**) to execute the action.



**Note:** A personnel number is not required to complete the Hire action.

# **Actions (0000)**

- The Actions infotype records the action and position number for the employee.
- Fields to complete:
  - **Reason for Action** (use the matchcode)
  - **Position**
- Click (**Enter**) to validate and populate the following fields:
  - **Personnel Area**
  - **Employee Group**
  - **Employee Sub-group**
- When finished, click (**Enter**) and then click (**Save**).

The screenshot shows the SAP Fiori interface for creating an 'Actions (0000)' infotype. The top navigation bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the header, there are icons for search, refresh, and save, followed by the title 'Create Actions (0000)' and a 'Change info group' button.

**Personnel action:** Action Type: U0 New Hire. Reason for Action: 02 (highlighted with a red box). Reference Pers. Nos.: [empty].

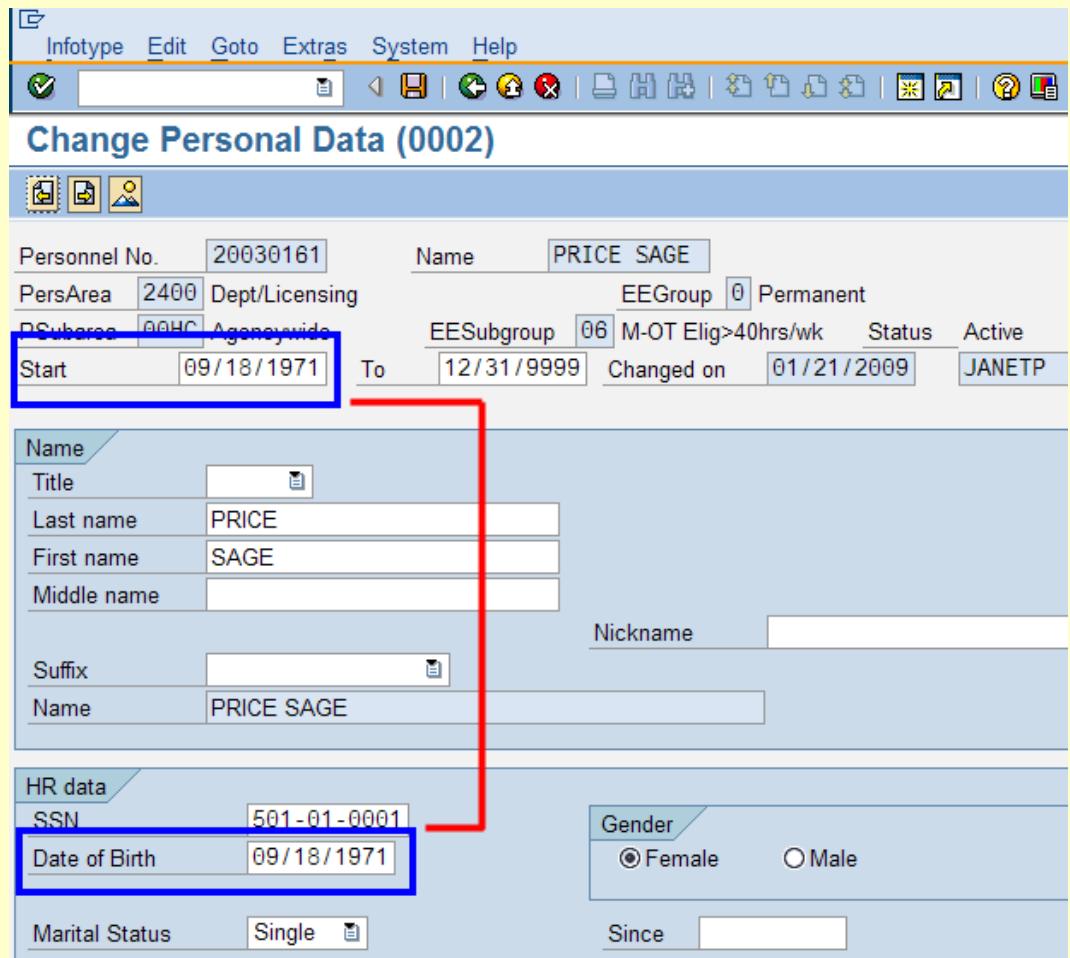
**Status:** Employment: 3 Active.

**Organizational assignment:** Position: 70094069 (highlighted with a red box). Personnel area: [empty]. Employee group: [empty]. Employee subgroup: [empty].

**Additional actions:** Start Date, Act., Action Type, and other buttons like 'ActR' and 'F'.

# **Personal Data (0002)**

- The Personal Data infotype records data to identify an employee.
- Fields to complete:
  - Last name
  - First name
  - Middle name (optional)
  - SSN
  - Date of birth
  - Marital status
  - Gender
- When finished, click  (**Enter**) and then click  (**Save**).



Infotype Edit Goto Extras System Help

Change Personal Data (0002)

Personnel No. 20030161 Name PRICE SAGE  
PersArea 2400 Dept/Licensing EEEGroup 0 Permanent  
PSubarea 00HC Agencywide EESubgroup 06 M-OT Elig>40hrs/wk Status Active  
Start 09/18/1971 To 12/31/9999 Changed on 01/21/2009 JANETP

Name  
Title  
Last name PRICE  
First name SAGE  
Middle name  
Suffix  
Name PRICE SAGE

Nickname  
Gender  
Female Male

HR data  
SSN 501-01-0001  
Date of Birth 09/18/1971

Marital Status Single Since

**Note:** The Start date will default to the employee's date of birth when validating your entries.

# **Organizational Assignment (0001)**

- The Organizational Assignment infotype records the assignment of an employee in the Organizational Structure.

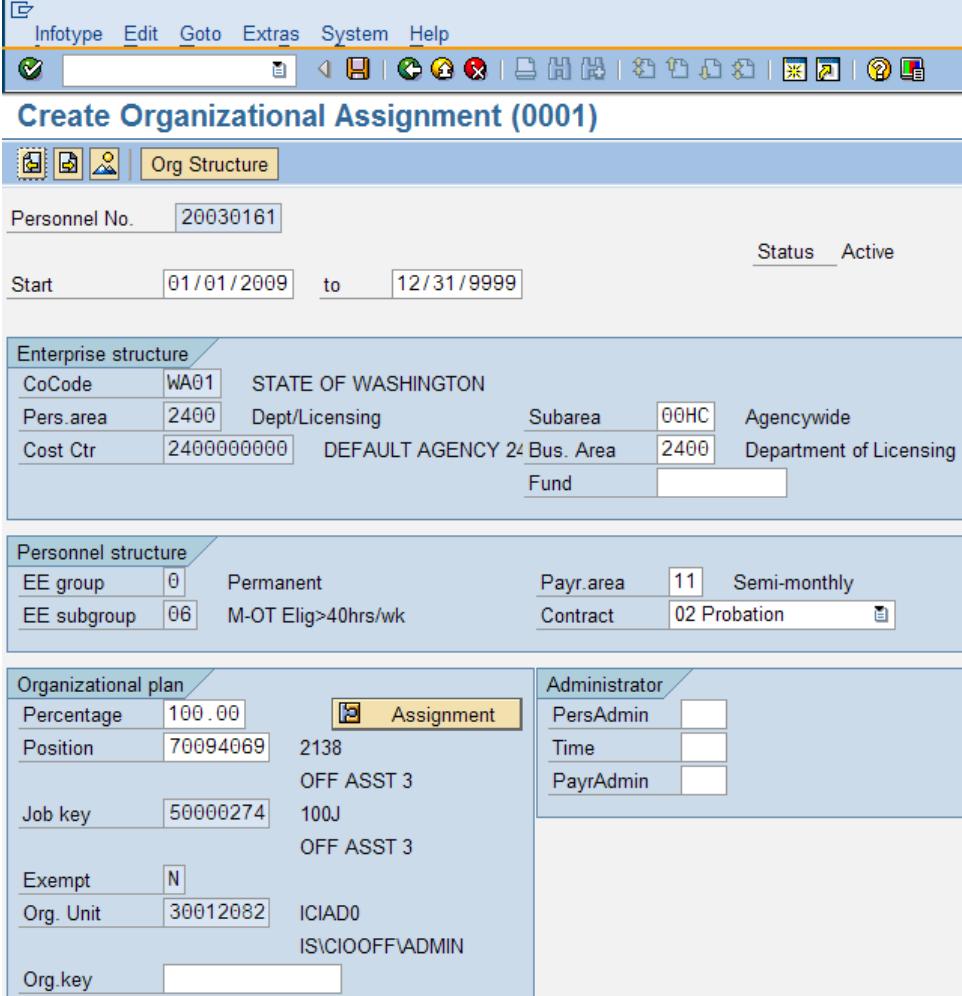
- Fields required to complete:

- **Contract**
    - Permanent (System Default)

- Optional fields:

- **Org. key**
  - **Administrator – Time**

- When finished, click  (**Enter**) and then click  (**Save**).



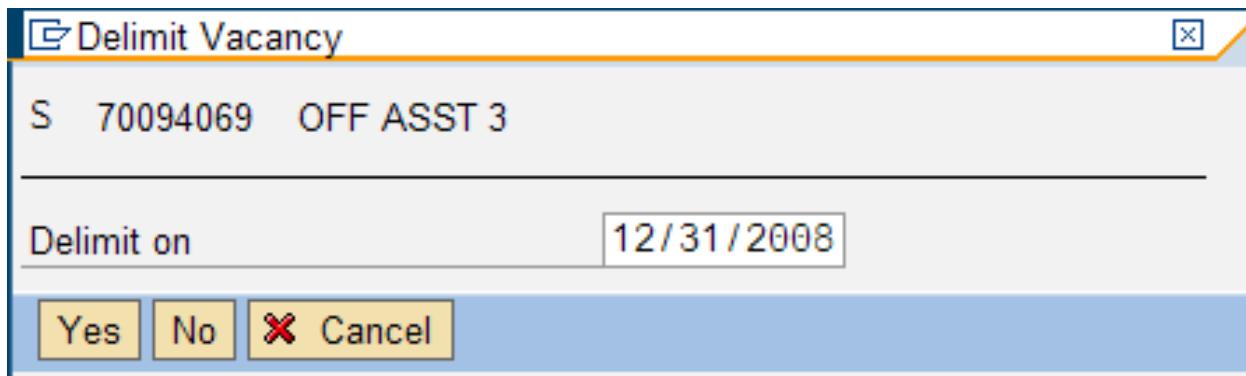
The screenshot shows the SAP Fiori interface for creating an organizational assignment. The top navigation bar includes Infotype, Edit, Goto, Extras, System, and Help. The title bar says "Create Organizational Assignment (0001)". Below the title, there are tabs for Org Structure and Org Structure (selected). The personnel number is 20030161, and the status is Active. The start date is 01/01/2009 and the end date is 12/31/9999. The enterprise structure section includes CoCode (WA01), Pers.area (2400), Cost Ctr (2400000000), and various subareas like 00HC, 24, and 2400. The personnel structure section includes EE group (0), EE subgroup (06), Payr.area (11), and Contract (02 Probation). The organizational plan section includes Percentage (100.00), Position (70094069), Job key (50000274), Exempt (N), Org. Unit (30012082), and Org.key. The administrator section includes PersAdmin, Time, and PayrAdmin fields. Icons for Enter and Save are visible at the bottom left of the screen.

# ***Delimit Vacancy***

A feature used to report vacant positions. Information will be updated on the *Position Vacancy* infotype located in Organizational Management.

- This popup window will appear if the position is vacant or if multi-filled.
- Click ‘Yes’ to delimit the vacancy.
- Click ‘No’ to not delimit the vacancy.

**Note:** If the position is multi-filled select ‘No’.



# **Contract Elements (0016)**

- The Contract Elements infotype tracks an employee's state status (permanent or non-permanent).

- Field required to complete:

- **Contract type**

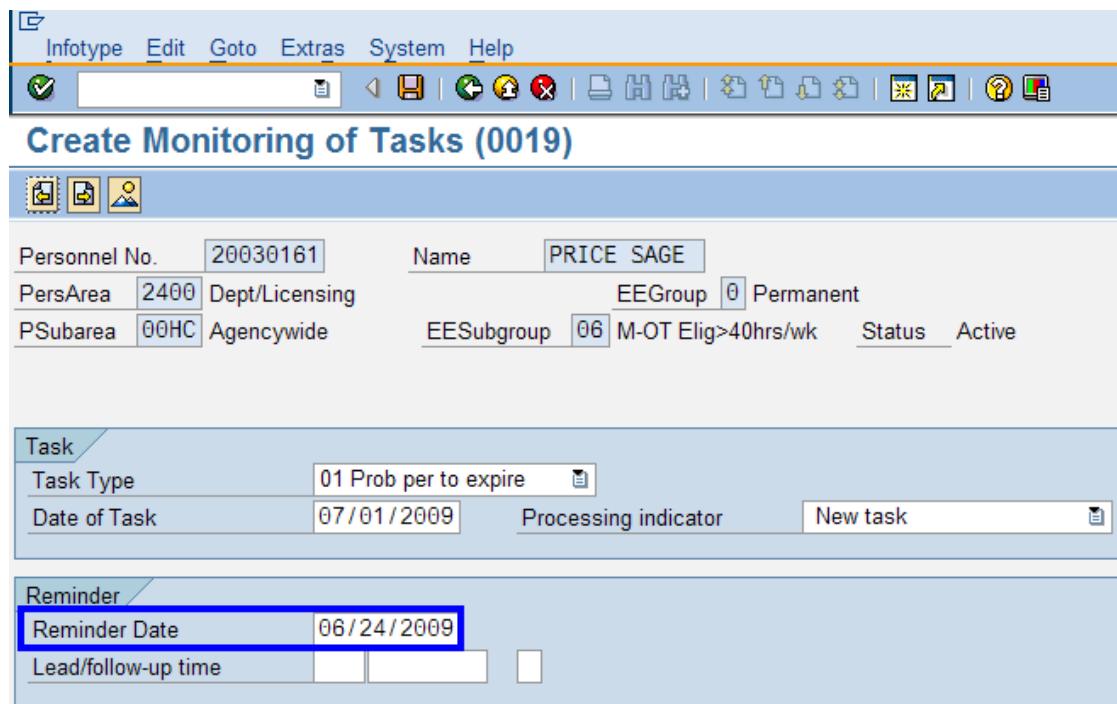
- Optional field:

- Probationary period

- When finished, click (**Enter**) and then click (**Save**).

# ***Monitoring of Tasks (0019)***

- The Monitoring of Tasks infotype tracks the dates on which an employee moves from non-permanent status to permanent status.
- Fields to complete:
  - **Reminder Date** or
  - **Lead/follow-up time**
- When finished, click  (**Enter**) and then click  (**Save**).



The screenshot shows the SAP Fiori interface for creating a Monitoring of Tasks (0019) infotype. At the top, the menu bar includes Infotype, Edit, Goto, Extras, System, and Help. Below the menu is a toolbar with various icons. The main title is "Create Monitoring of Tasks (0019)". The personnel details section shows:

Personnel No.	20030161	Name	PRICE SAGE
PersArea	2400	Dept/Licensing	EEGroup 0 Permanent
PSubarea	00HC	Agencywide	EESubgroup 06 M-OT Elig>40hrs/wk
		Status	Active

The Task section shows:

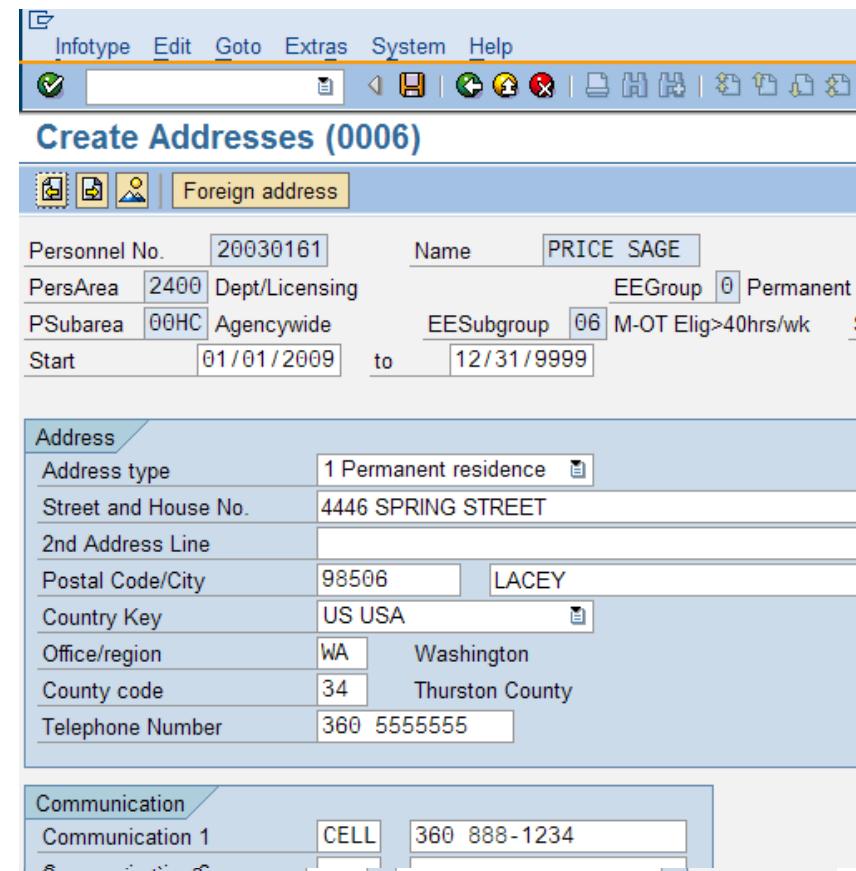
Task Type	01 Prob per to expire		
Date of Task	07/01/2009	Processing indicator	New task

The Reminder section shows:

Reminder Date	06/24/2009
Lead/follow-up time	

# Addresses (0006)

- The Addresses infotype records and stores address data on an employee.
- Fields to complete:
  - **Address type**
    - Permanent resident (required)
  - **Street/House no.**
  - **Postal code (Zip Code) / City**
  - **Office/region (State)**
  - **County code**
  - **Telephone number**
- This information is used to:
  - Calculate tax rates
  - The Permanent resident type is used to send benefit information to Department of Retirement Systems and Health Care Authority
- When finished, click  (**Enter**) and then click  (**Save**).



The screenshot shows the SAP Fiori interface for creating addresses. At the top, there's a toolbar with icons for Infotype, Edit, Goto, Extras, System, and Help. Below the toolbar, the title "Create Addresses (0006)" is displayed. The main area is divided into sections: "Address" and "Communication".

**Address Section:**

- Personnel No.: 20030161
- Name: PRICE SAGE
- PersArea: 2400 Dept/Licensing
- EEGroup: Permanent
- PSubarea: 00HC Agencywide
- EESubgroup: 06 M-OT Elig>40hrs/wk
- Start: 01/01/2009 to 12/31/9999

**Address Section (Details):**

- Address type: 1 Permanent residence
- Street and House No.: 4446 SPRING STREET
- 2nd Address Line: (empty)
- Postal Code/City: 98506 LACEY
- Country Key: US USA
- Office/region: WA Washington
- County code: 34 Thurston County
- Telephone Number: 360 5555555

**Communication Section:**

- Communication 1: CELL 360 888-1234

# **Planned Working Time (0007)**

- The Planned Working Time infotype stores the employee's work schedule.
- The following fields default in these values:

- **Work schedule rule**

- Full – M-F 5-8s

- **Time Mgmt status**

- 9 9 Time evaluation of planned times

- **Additional time ID**

- **Employment percent**

- 100.00

The screenshot shows the SAP Fiori interface for creating a Planned Working Time (0007) infotype. The top navigation bar includes Infotype, Edit, Goto, Extras, System, and Help. The main title is "Create Planned Working Time (0007)". Below the title, there are tabs for Work schedule, Work schedule rule, Working time, and Dyn. daily work schedule. The "Work schedule" tab is selected, showing the following data:

Personnel No.	20030161	Name	PRICE SAGE
PersArea	2400	Dept/Licensing	EEGroup 0 Permanent
PSubarea	00HC	Agencywide	EESubgroup 06 M-OT Elig>40hrs/wk
Start	01/01/2009	To	12/31/9999 Status Active

The "Work schedule rule" section contains:

- Work schedule rule: FULL
- Time Mgmt status: 9 9 - Time evaluation of planned times
- Part-time employee
- Additional time ID

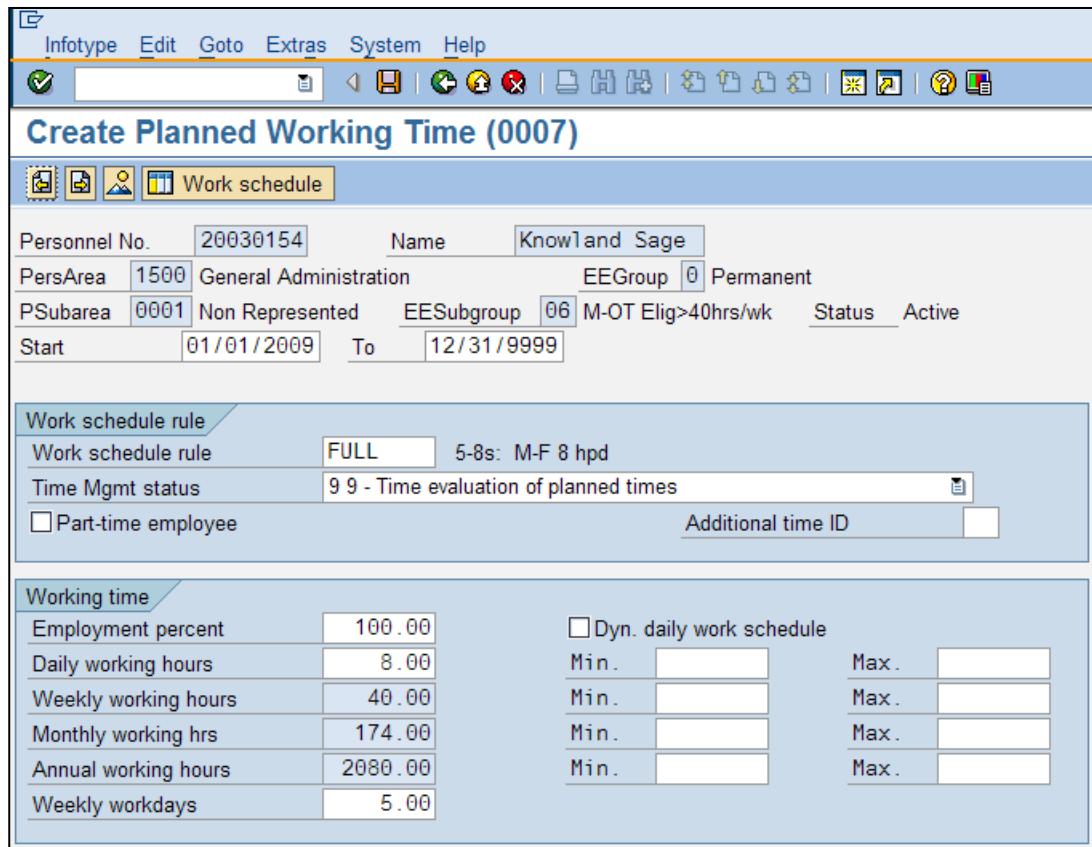
The "Working time" section contains:

- Employment percent: 100.00
- Daily working hours: 0.00
- Weekly working hours: 0.00
- Monthly working hrs: 0.00
- Annual working hours: 0.00
- Weekly workdays: 0.00
- Dyn. daily work schedule
- Min. and Max. fields for Daily, Weekly, Monthly, Annual, and Min. workdays.

**Note:** If the employee meets the defaulted schedule, this infotype can be validated and saved for ease of entry.

# **Planned Working Time (0007)**

- Fields to complete:
  - Work schedule rule
    - Full – M-F 5-8s
  - Time Mgmt status
    - 9 9 Time evaluation of planned times
  - Additional time ID
  - Employment percent
    - 100.00
- When finished, click  (**Enter**) and then click  (**Save**).



Personnel No.	20030154	Name	Knowland Sage
PersArea	1500	General Administration	
PSubarea	0001	Non Represented	EEGroup 0 Permanent
Start	01/01/2009	To	12/31/9999
<b>Work schedule rule</b>			
Work schedule rule	FULL	5-8s: M-F 8 hpd	
Time Mgmt status	9 9 - Time evaluation of planned times		
<input type="checkbox"/> Part-time employee	Additional time ID <input type="checkbox"/>		
<b>Working time</b>			
Employment percent	100.00	<input type="checkbox"/> Dyn. daily work schedule	
Daily working hours	8.00	Min.	Max.
Weekly working hours	40.00	Min.	Max.
Monthly working hrs	174.00	Min.	Max.
Annual working hours	2080.00	Min.	Max.
Weekly workdays	5.00		

# Available Work Schedules:

- There are more than 50 work schedules in HRMS.
- Typically, the work schedule is based on a 40-hour week, but HRMS accommodates non-traditional schedules.
  - Rotating work weeks
  - Altered work days (flex schedules)
  - Shortened work weeks
  - 24/7 schedules

Restrictions					
ES grouping: 2 Holiday Calendar ID: 5C PS grouping: 10					
WS r...	Work schedule rule text	PWS	Start Date	End Date	
FULL	5-8s: M-F 8 hpd	P001	01/01/1990	12/31/9999	
R003	5-8s: T-St, 8 hpd	P003	01/01/1990	12/31/9999	
R005	5-8s: W-Sn, 8 hpd	P005	01/01/1990	12/31/9999	
R007	5-8s: Th-M, 8 hpd	P007	01/01/1990	12/31/9999	
R009	5-8s: F-T, 8 hpd	P009	01/01/1990	12/31/9999	
R011	5-8s: St-W, 8 hpd	P011	01/01/1990	12/31/9999	
R013	5-8s: Sn-Th, 8 hpd	P013	01/01/1990	12/31/9999	
R015	4-10s: M-Th, 10 hpd	P015	01/01/1990	12/31/9999	
R017	4-10s: T-F, 10 hpd	P017	01/01/1990	12/31/9999	
R019	4-10s: W-St, 10 hpd	P019	01/01/1990	12/31/9999	
R021	4-10s: Th-Sn, 10 hpd	P021	01/01/1990	12/31/9999	
R023	4-10s: F-M, 10 hpd	P023	01/01/1990	12/31/9999	
R025	4-10s: St-T, 10 hpd	P025	01/01/1990	12/31/9999	
R027	4-10s: Sn-W, 10 hpd	P027	01/01/1990	12/31/9999	
R030	24/7: M-Sn, 24 hpd	P029	01/01/1990	12/31/9999	
R031	4-9s/4: M-Th 9, F 4	P031	01/01/1990	12/31/9999	
R032	4-9s/4: M-Th 9, Sn 4	P032	01/01/1990	12/31/9999	
R033	4-9s/4: T-F 9, St 4	P033	01/01/1990	12/31/9999	
R035	4-9s/4: W-St 9, Sn 4	P035	01/01/1990	12/31/9999	
R037	4-9s/4: Th-Sn 9, M 4	P037	01/01/1990	12/31/9999	
R039	4-9s/4: F-M 9, T 4	P039	01/01/1990	12/31/9999	
R041	4-9s/4: St-T 9, W 4	P041	01/01/1990	12/31/9999	
R043	4-9s/4: Sn-W 9, Th 4	P043	01/01/1990	12/31/9999	
R045	2Wk:M-Th 9, F 8, 2nd F 0	P045	01/01/1990	12/31/9999	
R047	2Wk: M-Th 9, F 0, 2nd F 8	P047	01/01/1990	12/31/9999	
R049	2Wk: M-F 9, 2nd Th 8, F 0	P049	01/01/1990	12/31/9999	
R051	2Wk: M 8, T-F 9, 2nd M 0	P051	01/01/1990	12/31/9999	
R053	2Wk: M 0, T-F 9, 2nd M 8	P053	01/01/1990	12/31/9999	
R055	2Wk: M-Th 9,F8,2nd M 0,F9	P055	01/01/1990	12/31/9999	

# **HRMS offers end users several options to successfully process part time salaried employees.**

- 1. Agencies need to assign part-time employees to a schedule and allow the system to reduce the planned hours for the employee based on the part time percentage entered in *Planned Working Time* (0007) and *Basic Pay* (0008).
  - **For example:** A 50% employee works 4 hours M-F. The agency would assign the employee to work schedule rule 'FULL'. The system will reduce the 8 hour days to 4 hour days.
- 2. If the agency cannot find a schedule in HRMS that matches the part-time salaried employee's schedule, the agency needs to consider the following options listed below:
- **Note:** Changing a salaried employee to an hourly employee could have contractual implications, consult with Labor Relations Office prior to taking such an action.

# ***Education (0022)***

- The Education subtype indicates the type of education the employee has achieved.

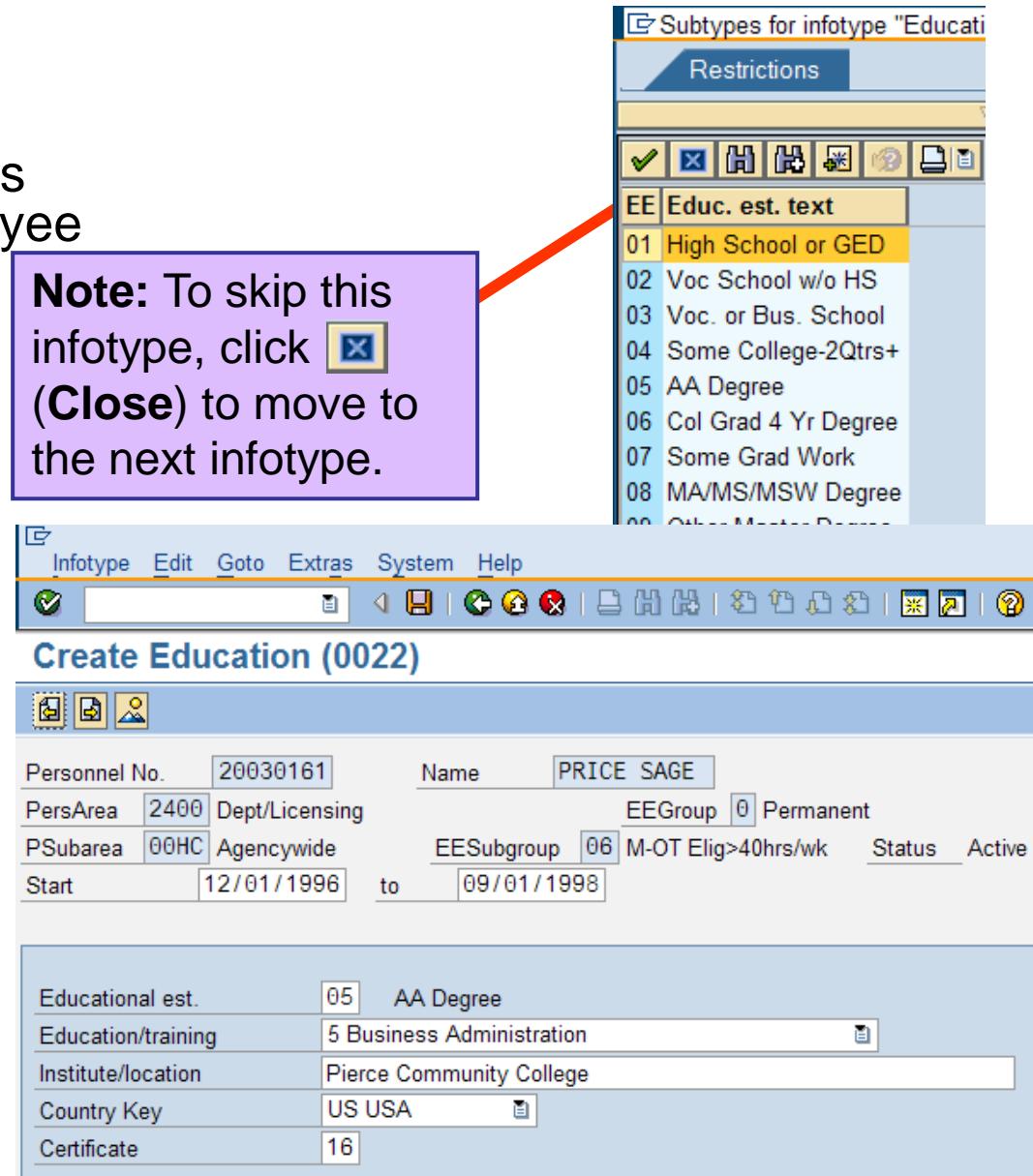
- Fields to complete:

- Start
- To
- Education/training
- Institute/location
- Certificate

- Use the Education infotype to document the details regarding education the employee has received.

- When finished, click  (Enter) and then click  (Save).

**Note:** To skip this infotype, click  (Close) to move to the next infotype.



EE	Educ. est. text
01	High School or GED
02	Voc School w/o HS
03	Voc. or Bus. School
04	Some College-2Qtrs+
05	AA Degree
06	Col Grad 4 Yr Degree
07	Some Grad Work
08	MA/MS/MSW Degree
09	Other

Infotype Edit Goto Extras System Help

Create Education (0022)

Personnel No.	20030161	Name	PRICE SAGE
PersArea	2400	Dept/Licensing	EEGroup 0 Permanent
PSubarea	00HC	Agencywide	EESubgroup 06 M-OT Elig>40hrs/wk
Start	12/01/1996	to	09/01/1998

Educational est.	05 AA Degree
Education/training	5 Business Administration
Institute/location	Pierce Community College
Country Key	US USA
Certificate	16

# **Date Specifications (0041) – cont'd**

- The Date Specifications infotype documents important employee dates in employment history.
- Dates will default to the effective date of the New Hire.

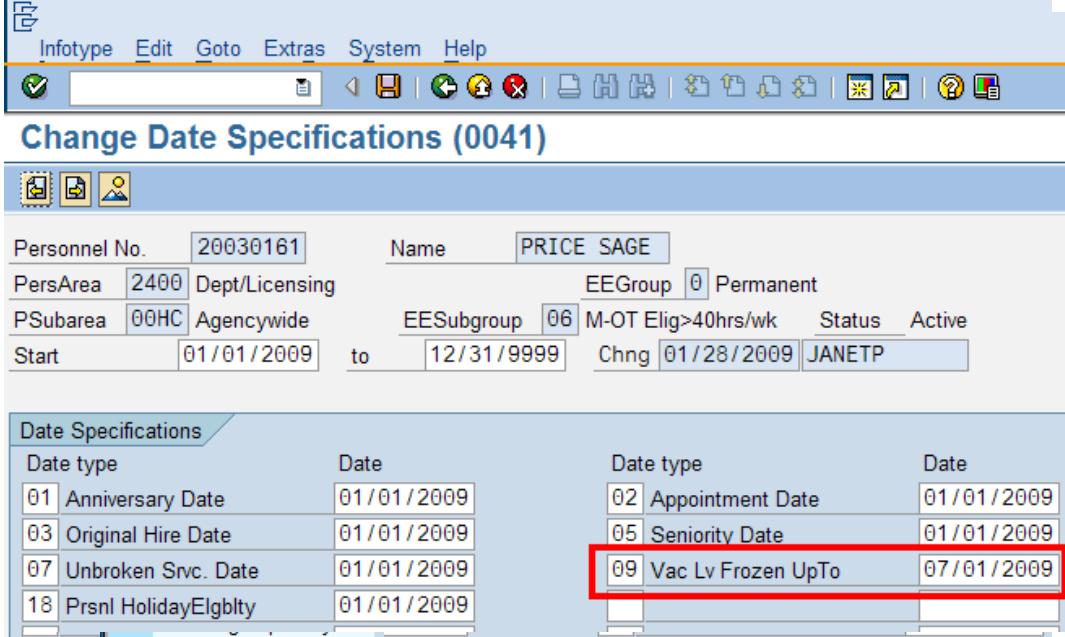
The screenshot shows the SAP Change Date Specifications (0041) interface. At the top, there's a toolbar with icons for Infotype, Edit, Goto, Extras, System, Help, and various document management functions. The main title is "Change Date Specifications (0041)". Below the title, there's a toolbar with icons for search, print, and other operations. The personnel number is listed as 20030161, and the name is PRICE SAGE. The personnel area is 2400 (Dept/Licensing), PSubarea is 00HC (Agencywide), and the EEGroup is 0 (Permanent). The start date is 01/01/2009, and the end date is 12/31/9999. The change date is 01/21/2009, and the status is Active. The "Date Specifications" section contains a table with four columns: Date type, Date, Date type, and Date. The first three rows are highlighted with an orange border:

Date type	Date	Date type	Date
01 Anniversary Date	01/01/2009	02 Appointment Date	01/01/2009
03 Original Hire Date	01/01/2009	05 Seniority Date	01/01/2009
07 Unbroken Srv. Date	01/01/2009	18 Prsnl HolidayElgblty	01/01/2009

# Date Specifications (0041)

- HRMS allows up to 12 date types for each record.
- To add another Date type such as 09 Vac Lv Frozen Up To

1. Click the  (**Matchcode**) in the next available Date type field to open selection list.
2. Double-click to select.
3. Enter date eligible.



Date type	Date	Date type	Date
01 Anniversary Date	01/01/2009	02 Appointment Date	01/01/2009
03 Original Hire Date	01/01/2009	05 Seniority Date	01/01/2009
07 Unbroken Svc. Date	01/01/2009	09 Vac Lv Frozen UpTo	07/01/2009
18 Prsnl HolidayElgbty	01/01/2009		

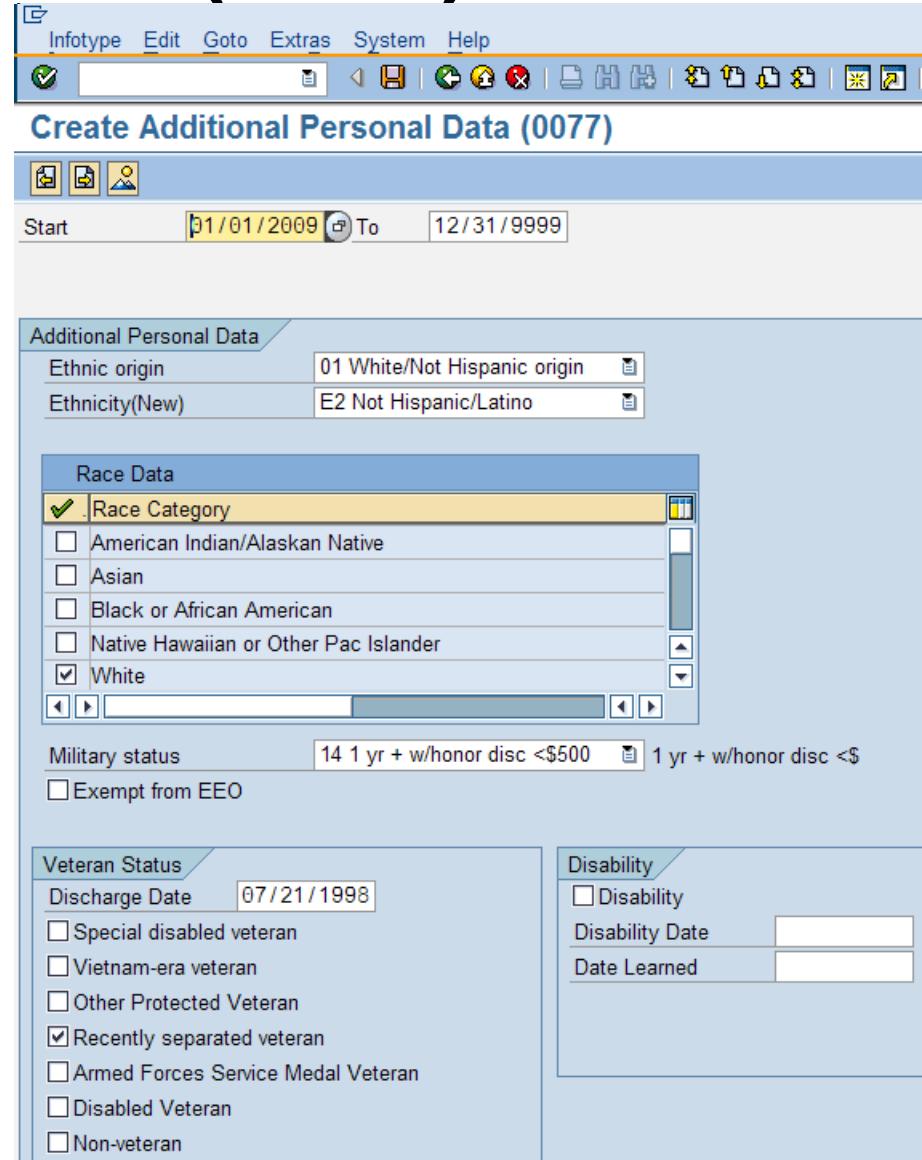
- When finished, click  (**Enter**) and then click  (**Save**).

# Date Specifications – Adjusting Service Dates

- You can adjust the service dates for employees who have worked in other covered jurisdictions (if appropriate), higher education institutions or have served in the military.
  - Although these positions are not former appointments within State of Washington, the work period is recognized by the State for recording purposes.
- Adjusting service dates is important since layoffs are or will be governed by a combination of seniority and performance (as defined by each agency).

# ***Additional Personal Data (0077)***

- The Additional Personal Data infotype documents an employee's Equal Employment Opportunity (EEO) information.
- Fields to complete:
  - **Ethnic origin**
  - **Ethnicity (New)**
  - **Race Category**
  - **Military status**
  - **Veteran status**
  - **Disability**
- When finished, click  (**Enter**) and then click  (**Save**).



The screenshot shows the SAP Fiori interface for creating Additional Personal Data (0077). The top navigation bar includes Infotype, Edit, Goto, Extras, System, and Help. Below the navigation is a toolbar with various icons. The main title is "Create Additional Personal Data (0077)".  
**Additional Personal Data:**

- Ethnic origin: 01 White/Not Hispanic origin
- Ethnicity(New): E2 Not Hispanic/Latino

**Race Data:**

- Race Category (selected): White
- Other options: American Indian/Alaskan Native, Asian, Black or African American, Native Hawaiian or Other Pac Islander

**Military status:**

- 14 1 yr + w/honor disc <\$500
- 1 yr + w/honor disc <\$
- Exempt from EEO (checkbox)

**Veteran Status:**

- Discharge Date: 07/21/1998
- Recently separated veteran (checkbox selected)
- Other veterans (checkboxes): Special disabled veteran, Vietnam-era veteran, Other Protected Veteran, Armed Forces Service Medal Veteran, Disabled Veteran, Non-veteran

**Disability:**

- Disability (checkbox)
- Disability Date (text field)
- Date Learned (text field)

# Military Service (0081)

- The Military Service infotype tracks the branch of military service the employee participated in.

- Field to complete:

- Start / To
  - Service type
    - 04 - US Air Force

- When finished, click **(Enter)** and then click **(Save)**.

The screenshot shows the SAP Infotype 'Create Military Service' screen. At the top, there's a toolbar with various icons. Below it, the title 'Create Military Service' is displayed. The main area contains personnel information: Personnel No. 20000002, Name PRICE SAGE, PersArea 2400 (Dept/Licensing), PSubarea 00HC (Agencywide), Start date 07/21/1998, To date 12/19/2008, EEGroup 0 (Permanent), EESubgroup 06 (M-OT Elig>40hrs/wk), and Status Active. Below this, a section titled 'Military/non-military service' shows Service type 04. A dropdown menu is open, listing service branches: United States Marine Corps (01), United States Navy (02), United States Army (03), United States Air Force (04, highlighted with a red box), National Guard (05), and Coast Guard (06). The 'ST...' column is labeled 'Name'.

**Note:** The Start / To dates should reflect the employee's military service dates listed on the form DD 214.

# **Time Specifications / Employment Period (0552)**

- The Time Specifications / Employment Period infotype tracks any military service dates and the resulting time spent in the service.

- Fields to complete:

- **Start** (01/21/1999)
- **To** (02/01/2002)
- **Imputable period** (Years, Months, and Days)

- When finished, click **(Enter)** and then click **(Save)**.

**Note:** The Start / To dates should reflect the employee's military service dates listed on the form DD 214.

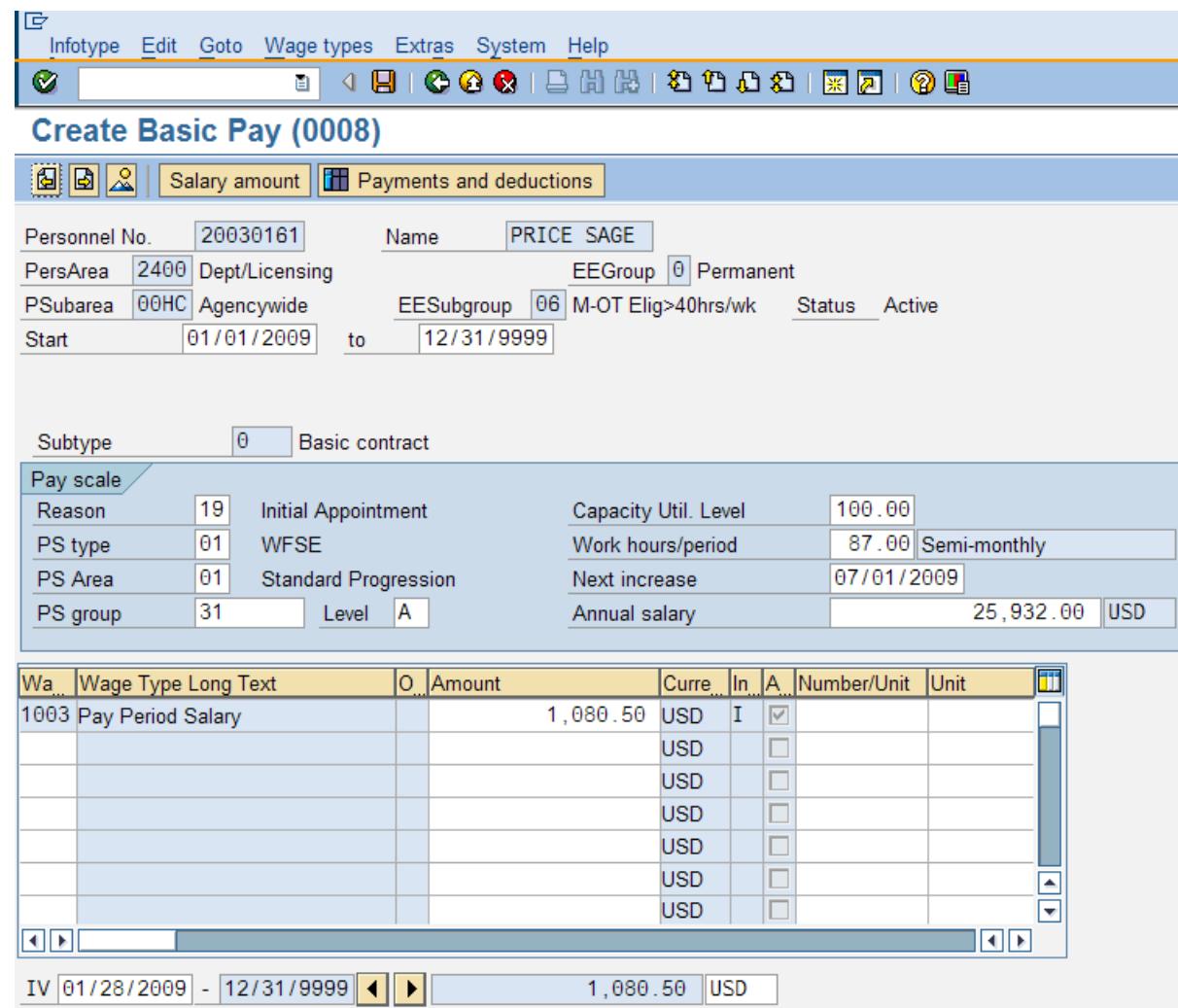
# **Basic Pay (IT0008)**

■ The Basic Pay infotype records pay scale and salary information for an employee.

■ Fields to complete:

- **Reason** – (19 Initial Appointment)
- **Next Increase** – (optional)
- **PS Level**
- **Capacity utility level** (defaults in)

■ When finished, click  (Enter) and then click  (Save).



The screenshot shows the SAP Fiori interface for creating basic pay (IT0008). The top navigation bar includes Infotype, Edit, Goto, Wage types, Extras, System, and Help. Below the navigation is a toolbar with various icons. The main title is "Create Basic Pay (0008)". There are two tabs: "Salary amount" (selected) and "Payments and deductions".

Personnel No.: 20030161, Name: PRICE SAGE  
PersArea: 2400 Dept/Licensing, EEGroup: 0 Permanent  
PSubarea: 00HC Agencywide, EESubgroup: 06 M-OT Elig>40hrs/wk, Status: Active  
Start: 01/01/2009, to: 12/31/9999

Subtype: 0 Basic contract

Pay scale:

Reason: 19	Initial Appointment	Capacity Util. Level: 100.00
PS type: 01	WFSE	Work hours/period: 87.00
PS Area: 01	Standard Progression	Next increase: 07/01/2009
PS group: 31	Level: A	Annual salary: 25,932.00
		USD

Wage Type Long Text: 1003 Pay Period Salary, Amount: 1,080.50, Currency: USD, Invoiced: I, Number/Unit: , Unit: .

IV: 01/28/2009 - 12/31/9999, Amount: 1,080.50, Currency: USD

# Personnel Administration / Payroll Handoff

- At this point in the Hire action, the employee is created in HRMS and the system generates a Personnel Number, but the employee cannot be paid yet.
- You are responsible for transferring the New Hire information packet to the Payroll Processor.
- The Payroll Processor or Benefits Processor is responsible for completing the following infotypes:
  - *Bank Details*
  - *Recurring Payments / Deductions*
  - *Create Unemployment State*
  - *Withholdings Info W4 / W5 US*
  - *Additional Withholding*
  - *Benefits Enrollment*



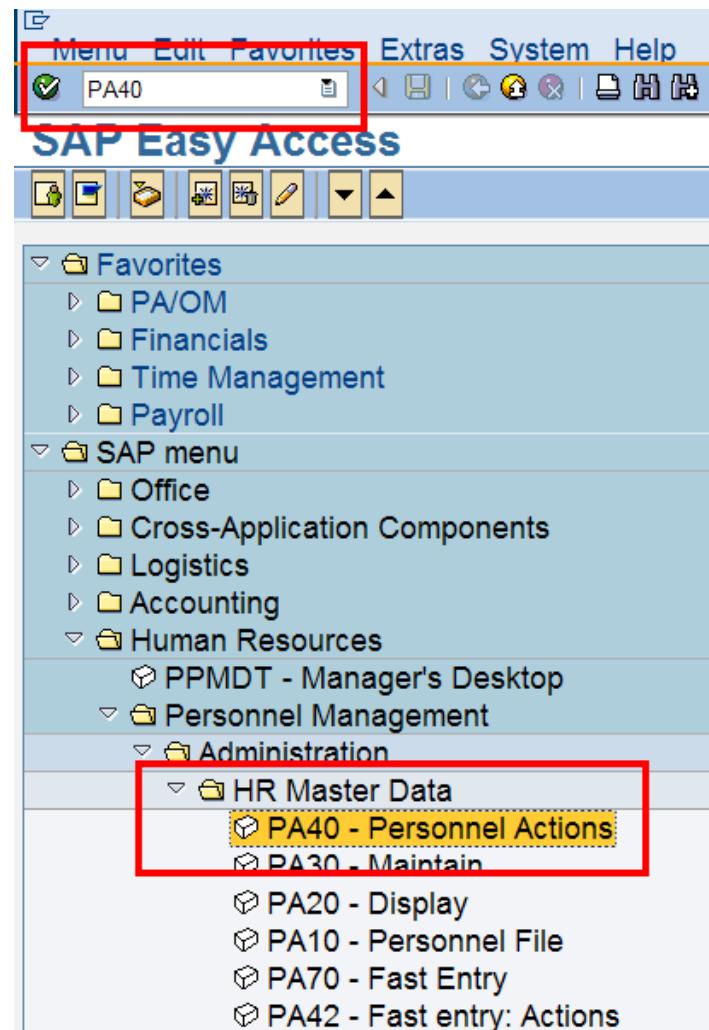
After saving *Basic Pay (0008)*,  
click  **(Exit)** to exit the action.

# Restarting an Action

- During the New Hire, the Personnel Administration (PA) Processor may find themselves needing to stop in the middle of the Personnel Action transaction (PA40). In this case, the last infotype that was saved is where the PA Processor will continue.
  - This can be done when completing any of the Personnel Action such as the Rehire, Appointment, Separation, etc.
  - By restarting an action, it ensures that all infotypes are completed.

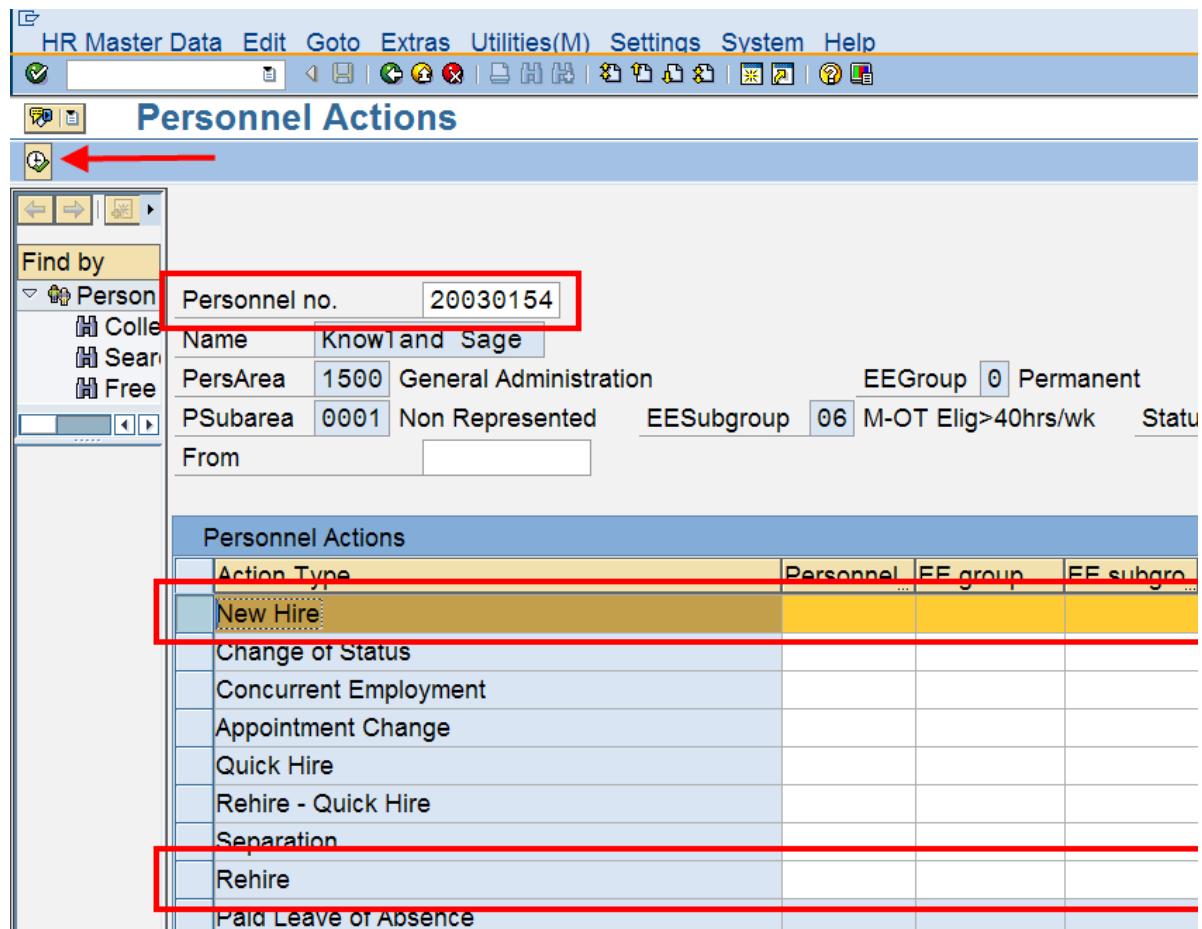
# Restarting a Personnel Action

- To restart a Personnel action use the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
  - Or enter transaction code **PA40** in the **Command** field
- Using the action will ensure that all required infotype records are created



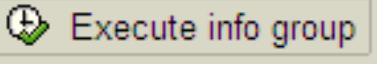
# Accessing the New Hire/Rehire Action

- A personnel number is required to complete the New Hire or Rehire action.
- To access the action, click the box to the left of **New Hire or Rehire**.
- Click  (**Execute**) to execute the action.

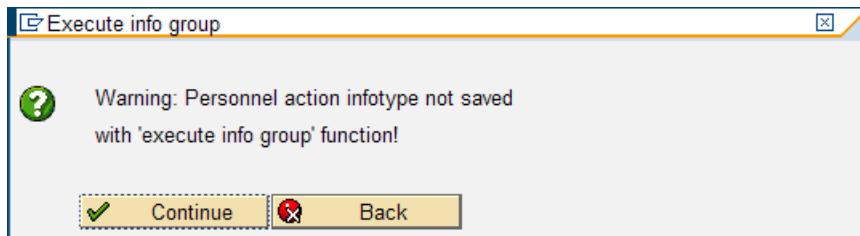


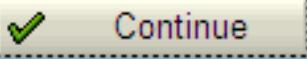
# New Hire/Rehire action

- From Actions (0000) click

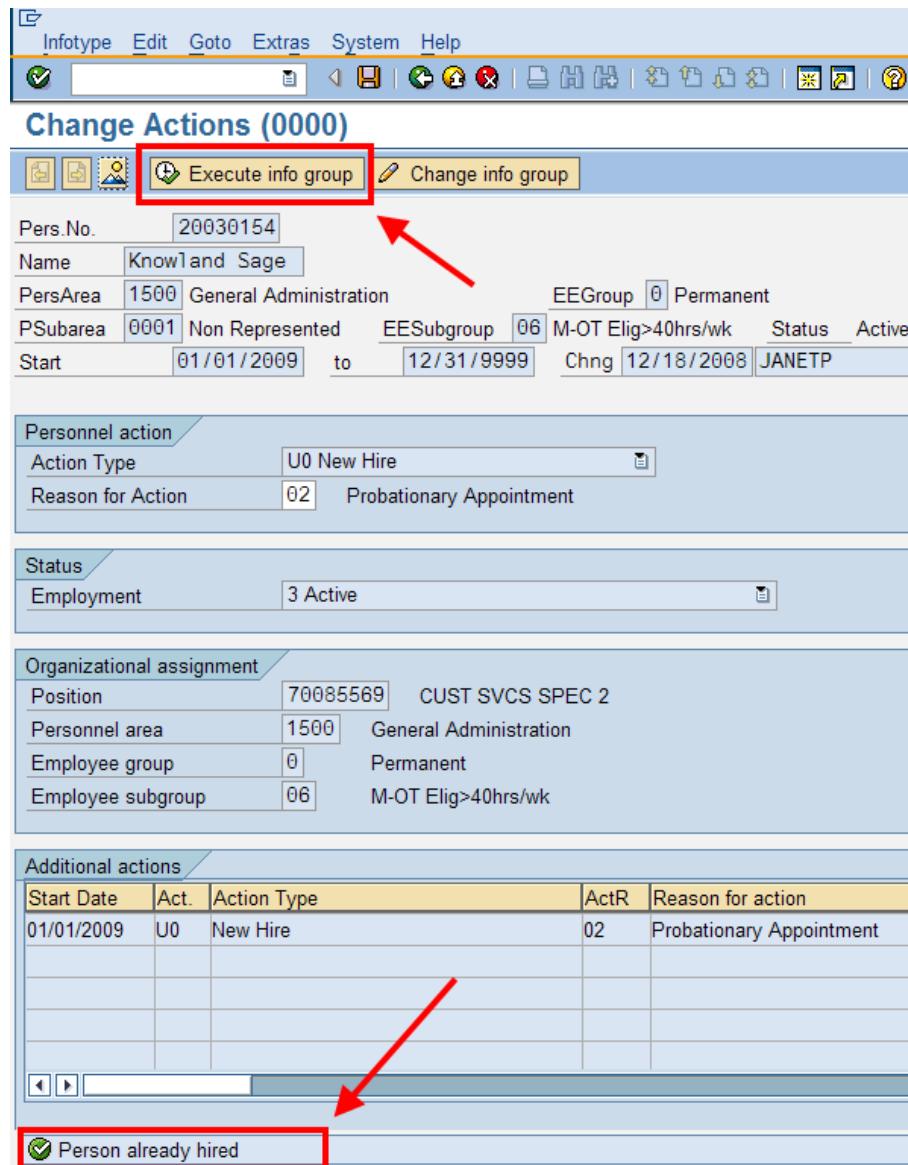
 **(Execute info group)**

- The following warning message will appear:



- Click  **(Continue)**

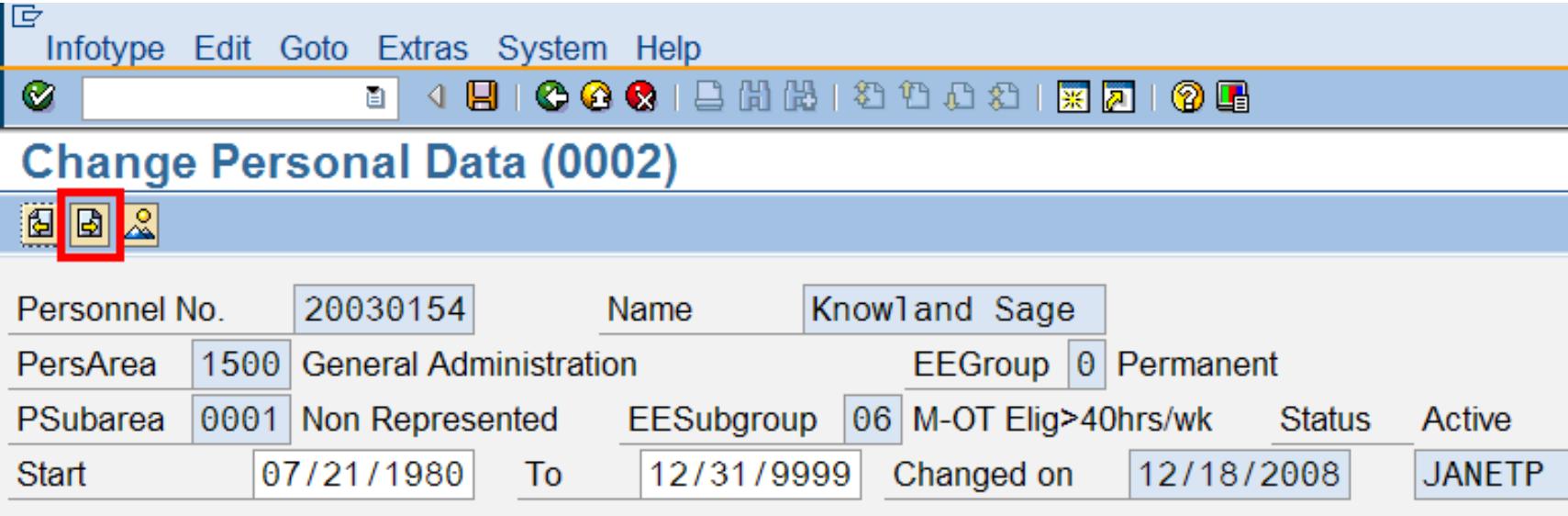
**Note:** Notice message on the status bar of 'Person already hired'.



The screenshot shows the SAP HR application interface for a personnel action. The top navigation bar includes Infotype, Edit, Goto, Extras, System, and Help. The main title is "Change Actions (0000)". A red box highlights the "Execute info group" button in the toolbar. Below it, the personnel record details are shown: Pers.No. 20030154, Name Knowland Sage, PersArea 1500 General Administration, PSubarea 0001 Non Represented, EESubgroup 06 M-OT Elig>40hrs/wk, Status Active, Start Date 01/01/2009 to 12/31/9999, Chng Date 12/18/2008, and Chng ID JANETP. The "Personnel action" section shows Action Type U0 New Hire and Reason for Action 02 Probationary Appointment. The "Status" section shows Employment 3 Active. The "Organizational assignment" section lists Position 70085569 CUST SVCS SPEC 2, Personnel area 1500 General Administration, Employee group 0 Permanent, and Employee subgroup 06 M-OT Elig>40hrs/wk. The "Additional actions" section shows a table with one row: Start Date 01/01/2009, Act. U0, Action Type New Hire, ActR 02, and Reason for action Probationary Appointment. A red arrow points from the "Execute info group" button to the "Personnel action" section. Another red arrow points from the "Personnel action" section to the status bar at the bottom, which displays the message "Person already hired".

# New Hire/Rehire action

- As mentioned before, because the action has already been started you will begin from the last infotype saved.
- Once the Infotype Group is executed, you will have to click  (Next Record) until you reach the appropriate infotype.



The screenshot shows the SAP HR application interface for changing personal data. The title bar reads "Change Personal Data (0002)". The toolbar includes standard SAP icons for file operations like New, Open, Save, and Print. A specific icon for navigating between records is highlighted with a red box. The main area displays personnel data in a grid:

Personnel No.	20030154	Name	Knowland Sage	
PersArea	1500	General Administration	EEGroup	0 Permanent
PSubarea	0001	Non Represented	EESubgroup	06 M-OT Elig>40hrs/wk
Start	07/21/1980	To	12/31/9999	Changed on 12/18/2008 Status Active

# **HRMS Activity**



**Hire an Employee**

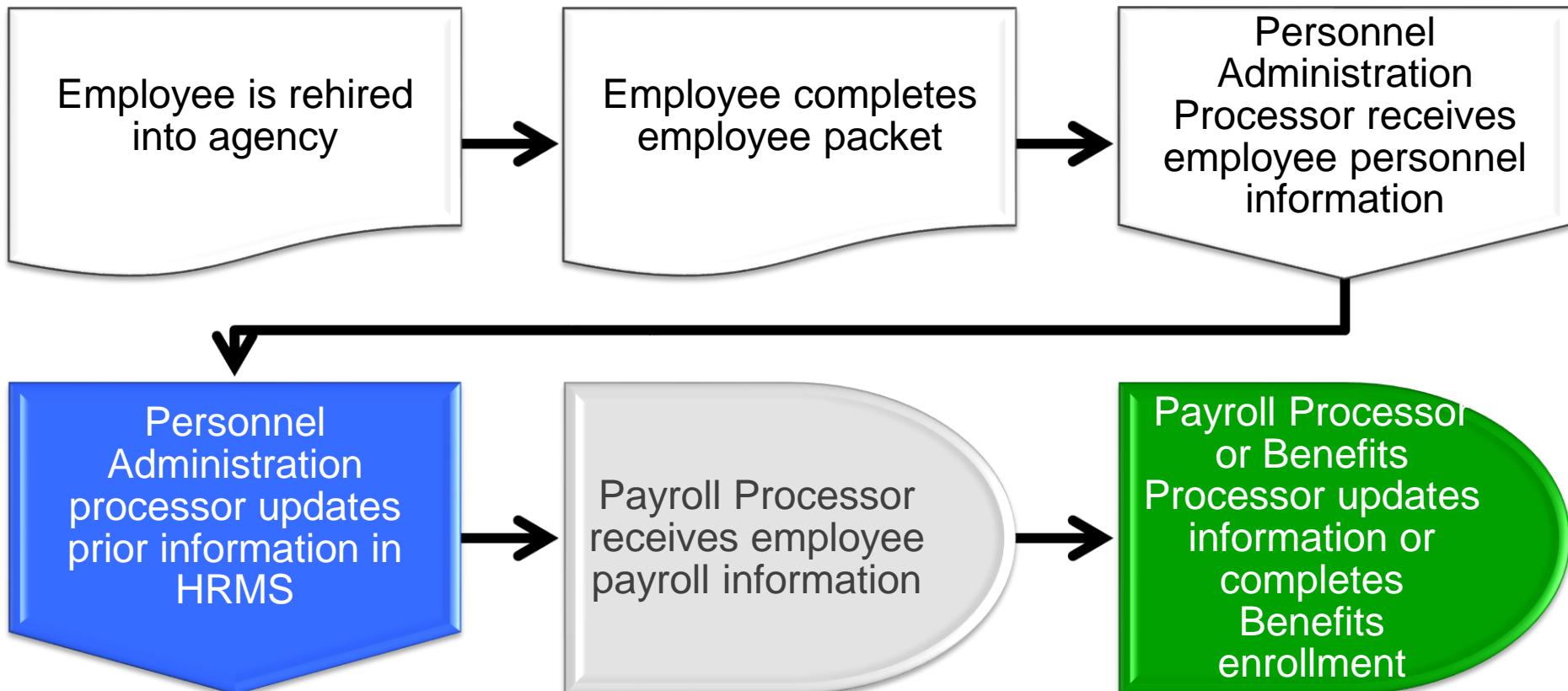
# Rehire

# Rehire Overview

Upon completion of this section, you will be able to:

- Describe the difference between a Hire action and a Rehire action.
- Explain the overall business process flow associated with the Employee Rehire action.
- Navigate through the Employee Rehire infotypes and understand the importance of the information in each infotype.
- Complete a Rehire action in HRMS.

# Rehire Process Flow



## Legend



Business Process



PA Processor Role



HRMS Entry



Payroll Processor Role

# Rehire an Employee

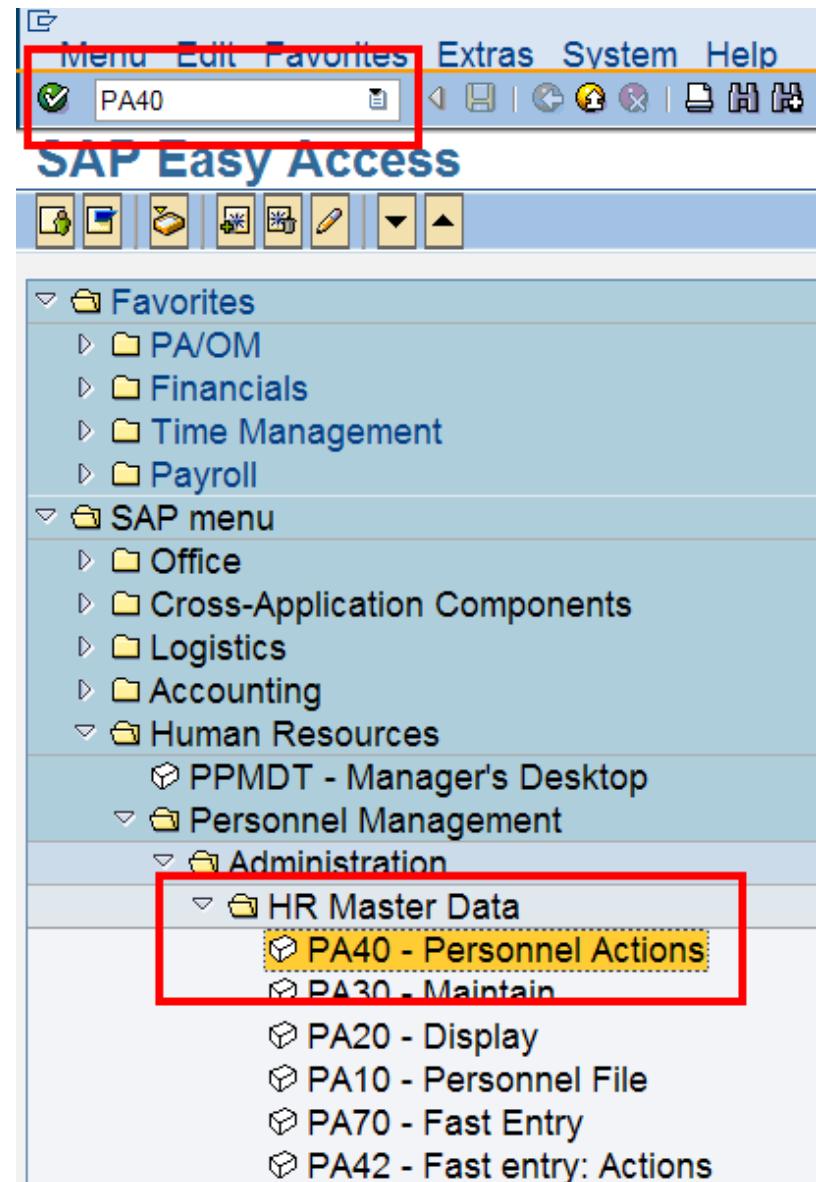
- Use the Rehire action for \_\_\_\_\_ state employee and their Personnel Number \_\_\_\_\_ in HRMS.
  - You have the ability to search for the employee in HRMS from the Personnel Actions screen (**PA40**).
- During the Rehire action, infotypes that were created from the previous appointment will have fields that are already completed. You will need to review and update these fields if necessary.
  - Example: The *Addresses* infotype (0006) will have the address from the employee's last appointment.

# Rehire Infotypes

- Update the following infotypes during the Rehire action including:
  - Actions (0000)
  - Personal Data (0002)
  - Organizational Assignment (0001)
  - Contract Elements (0016)
  - Monitoring of Tasks (0019)
  - Addresses (0006)
  - Planned Working Time (0007)
  - Education (0022)
  - Date Specifications (0041)
  - Additional Personal Data (0077)
  - Basic Pay (0008)

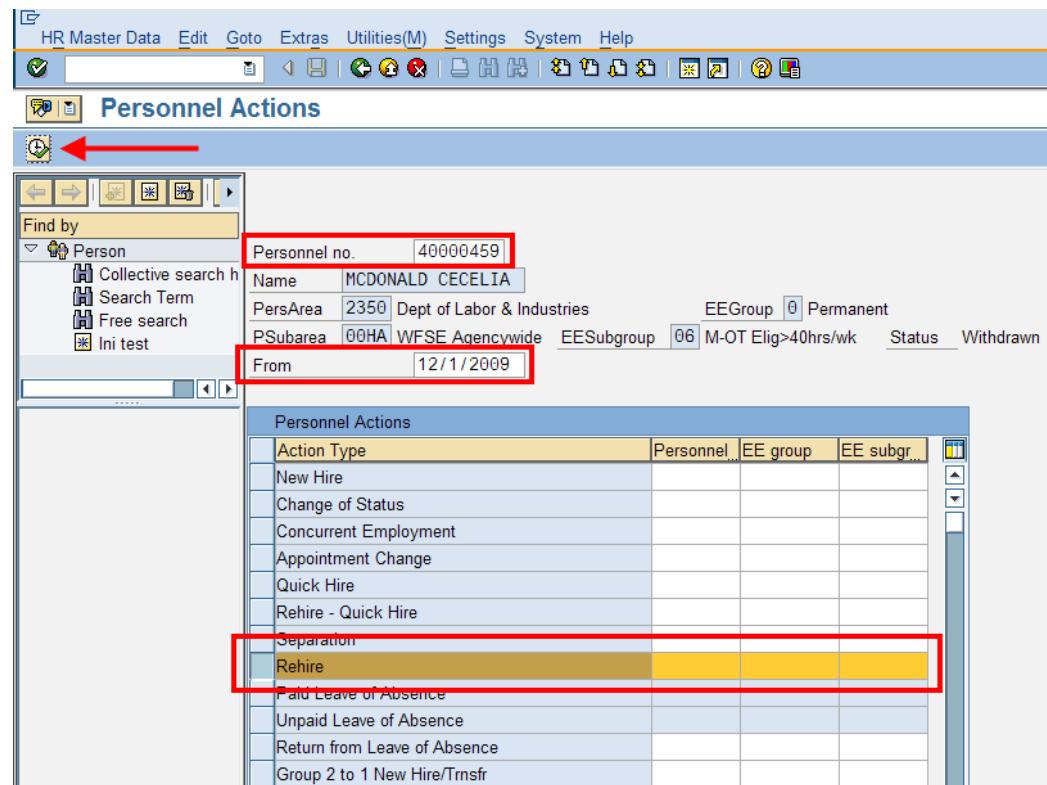
# Rehire Action

- To create a Rehire Action using the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
  - Or enter transaction code **PA40** in the **Command** field
- Using the action will ensure that all required infotype records are created.



# Rehire Personnel Action

- A Personnel Number is required to rehire an employee. Employees who have been entered into the system previously have an assigned personnel number in HRMS.
- Fields to complete:
  - **From (Date of Hire)**
  - **Personnel no.**
- To access the Rehire action, click the box to the left of *Rehire*.
- Then click  (**Execute**).



# Actions (0000)

- The Actions infotype records the action and position number for the employee.
- Fields to complete:
  - Reason for Action (use matchcode)
  - Position
- Click (Enter) to validate and populate the following fields:
  - Personnel Area
  - Employee Group
  - Employee Sub-group
- When finished, click (Enter) and then click (Save).

The screenshot shows the SAP Fiori interface for the 'Copy Actions' screen. The top navigation bar includes Infotype, Edit, Goto, Extras, System, and Help. Below the navigation is a toolbar with various icons. The main area displays employee details: Pers. No. 40000459, Name MCDONALD CECELIA, PersArea 2350 (Dept of Labor & Industries), EEGroup 0 (Permanent), PSubarea 00HA (WFSE Agencywide), EESubgroup 06 (M-OT Elig>40hrs/wk), Start date 12/01/2009, End date 12/31/9999, and Status Withdrawn. A red box highlights the PersArea field. Below this, the 'Personnel action' section shows Action Type U6 Rehire and Reason for Action 02 Probationary Appointment, also highlighted with a red box. Another red box highlights the Reason for Action entry. The 'Status' section shows Employment 3 Active. The 'Organizational assignment' section shows Position 71014043 (HUMAN RESOURCE CONSULTANT), Personnel area 3000 (DSHS Headquarters), Employee group 0 (Permanent), and Employee subgroup 01 (Monthly(M) OT Exempt). The 'Additional actions' section is shown at the bottom.

# ***Delimit Message***

- The delimit message will appear when validating the information entered on the infotype. The message reads “**Record valid from XX/XX/XXXX to XX/XX/XXXX delimited at end**”.



Record valid from 06/01/2008 to 12/31/9999 delimited at end

- Continue to **(Enter)** through message until the “Save Your Entries” prompt appears.



Save your entries

# ***Personal Data (0002)***

- The Personal Data infotype records data to identify an employee.
- For a rehire, verify and correct any data on this infotype.
- When finished, click **(Enter)** and then click **(Save)**. If information is correct, do not save and click **(Next Record)**.

The screenshot shows the SAP HR Personal Data (0002) infotype screen. The top navigation bar includes Infotype, Edit, Goto, Extras, System, and Help. Below the menu is a toolbar with various icons. The main title is "Copy Personal Data".

**Personnel No.** 40000459 **Name** MCDONALD CECELIA  
**PersArea** 2350 **Dept of Labor & Industries** **EEGroup** 0 Permanent  
**PSubarea** 00HA **WFSE Agencywide** **EESubgroup** 06 M-OT Elig>40hrs/wk **Status** Active  
**Start** 12/01/2009 **To** 12/31/9999

**Name**  
Title   
Last name MCDONALD  
First name CECELIA  
Middle name   
Nickname   
Suffix   
Name MCDONALD CECELIA

**HR data**  
**SSN** 500-10-1409 **Gender**  
**Date of Birth** 01/23/1966  Female  Male  
**Marital Status** Single   
**Since**

# **Organizational Assignment (0001)**

■ The Organizational Assignment infotype records the assignment of an employee in the Organizational Structure.

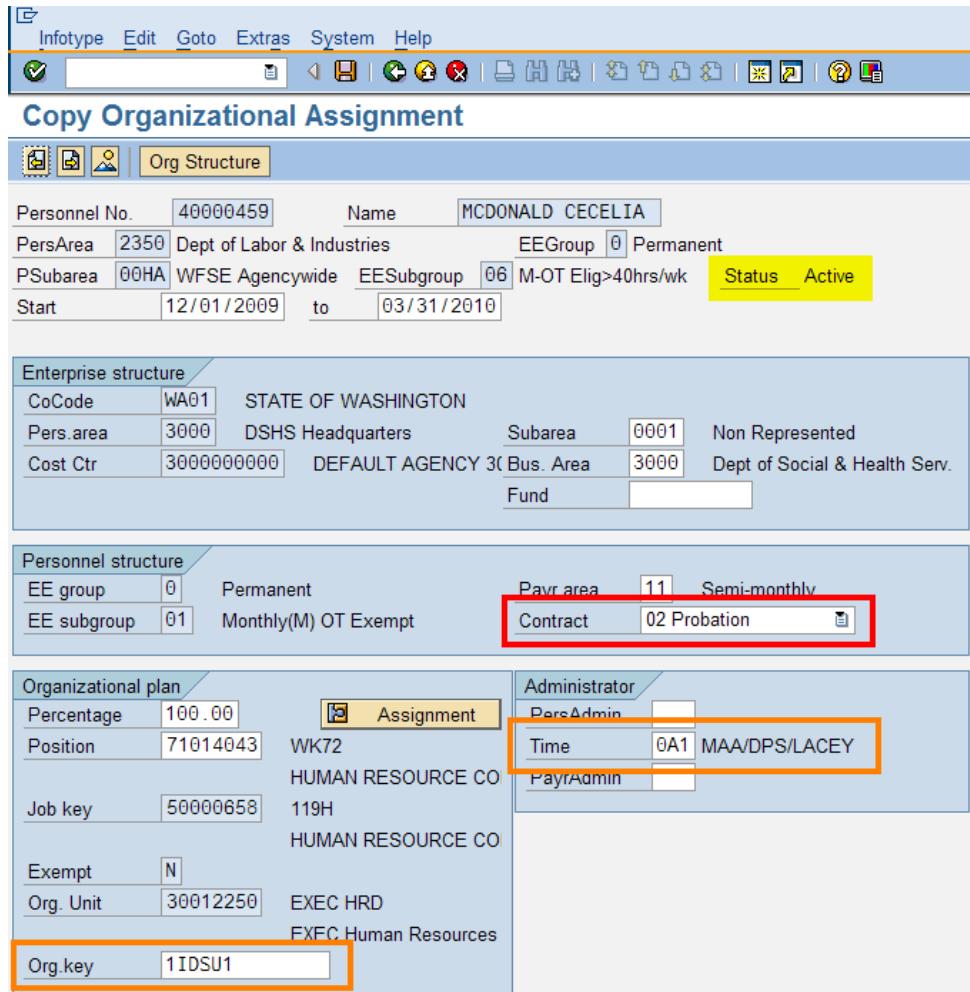
■ Fields to complete:

- Contract
  - 02 Probation

■ Optional fields:

- Org Key
- Administrator (Time)

■ When finished, click  (Enter) and then click  (Save).



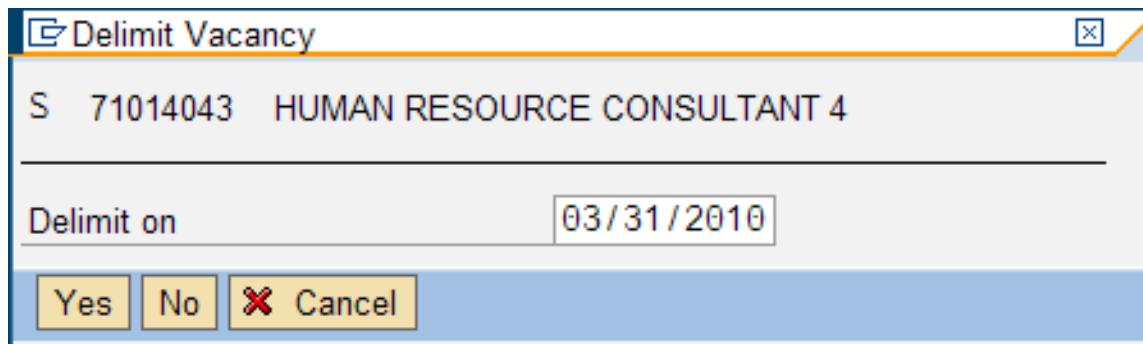
The screenshot shows the SAP Infotype 'Copy Organizational Assignment' screen. The top section displays personnel details: Personnel No. 40000459, Name MCDONALD CECELIA, PersArea 2350 (Dept of Labor & Industries), PSubarea 00HA (WFSE Agencywide), Start date 12/01/2009, and End date 03/31/2010. The EEGroup is 0 Permanent, EESubgroup is 06 M-OT Elig>40hrs/wk, and Status is Active. Below this is the 'Enterprise structure' section with CoCode WA01 (STATE OF WASHINGTON), Pers.area 3000 (DSHS Headquarters), Subarea 0001 (Non Represented), Cost Ctr 3000000000 (DEFAULT AGENCY 30 Bus. Area), and Fund (Dept of Social & Health Serv.). The 'Personnel structure' section shows EE group 0 (Permanent), EE subgroup 01 (Monthly(M) OT Exempt), Payr area 11 (Semi-monthly), and Contract set to 02 Probation. The 'Organizational plan' section includes Percentage 100.00, Position 71014043 (WK72 HUMAN RESOURCE CO), Job key 50000658 (119H HUMAN RESOURCE CO), Exempt N, Org. Unit 30012250 (EXEC HRD FXFC Human Resources), and Org.key 1IDSU1. The 'Administrator' section lists PersAdmin (Time 0A1 MAA/DPS/LACEY) and PayrAdmin.

# ***Delimit Vacancy***

A feature used to report vacant positions. Information will be updated on the *Position Vacancy* infotype located in Organizational Management.

- This popup window will appear if the position is vacant or if multi-filled.
- Click ‘Yes’ to delimit the vacancy.
- Click ‘No’ to not delimit the vacancy.

**Note:** If the position is multi-filled select ‘No’.



# ***Contract Elements (0016)***

The *Contract Elements* infotype tracks an employee's state status (permanent or non-permanent).

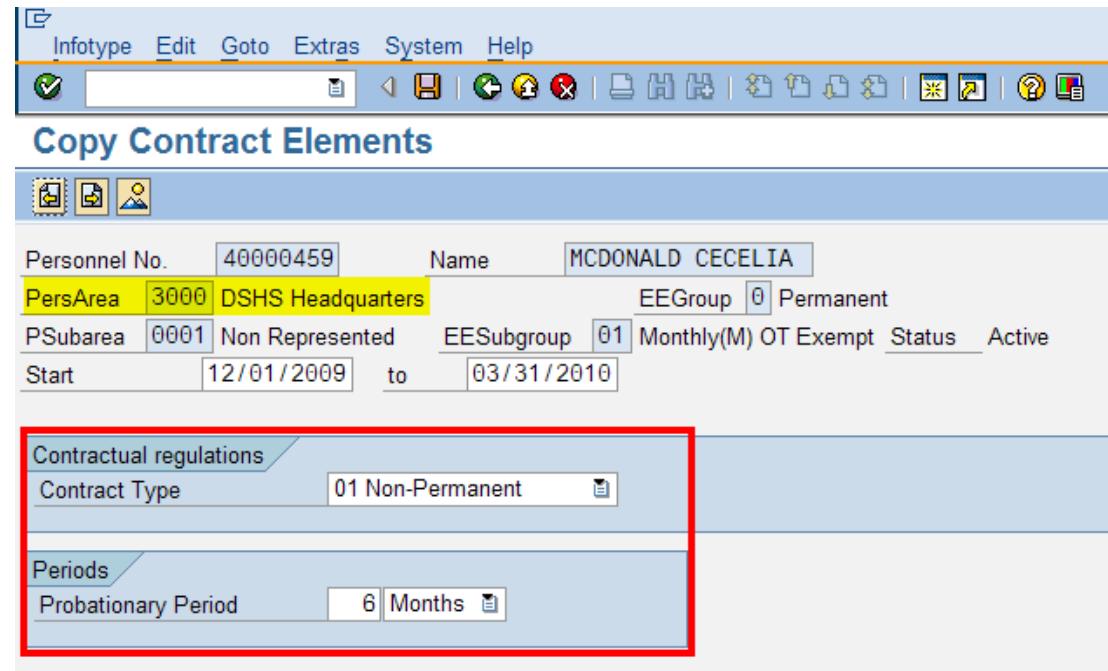
- Fields required to complete:

- Contract type

- Optional field

- Probationary period

- When finished, click  (Enter) and then click  (Save).



Infotype Edit Goto Extras System Help

Copy Contract Elements

Personnel No.	40000459	Name	MCDONALD CECELIA
PersArea	3000 DSHS Headquarters	EEGroup	0 Permanent
PSubarea	0001 Non Represented	EESubgroup	01 Monthly(M) OT Exempt
Start	12/01/2009	to	03/31/2010

**Contractual regulations**

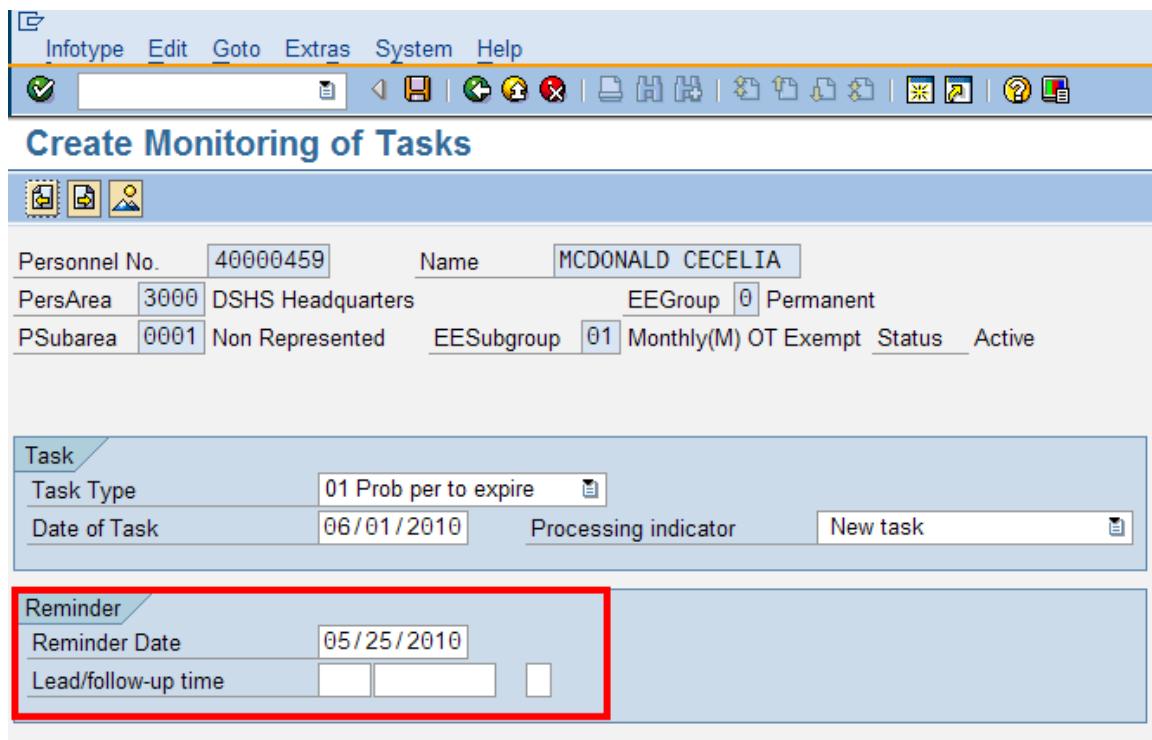
Contract Type	01 Non-Permanent
---------------	------------------

**Periods**

Probationary Period	6 Months
---------------------	----------

# ***Monitoring of Task (0019)***

- The *Monitoring of Tasks* infotype tracks the dates on which an employee moves from non-permanent status to permanent status.
- Fields to complete:
  - **Date of Task**
  - **Processing indicator**
  - **Reminder Date**
- When finished, click  (**Enter**) and then click  (**Save**).



Infotype Edit Goto Extras System Help

Create Monitoring of Tasks

Personnel No.	40000459	Name	MCDONALD CECELIA
PersArea	3000	DSHS Headquarters	EEGroup 0 Permanent
PSubarea	0001	Non Represented	EESubgroup 01 Monthly(M) OT Exempt
Status	Active		

**Task**

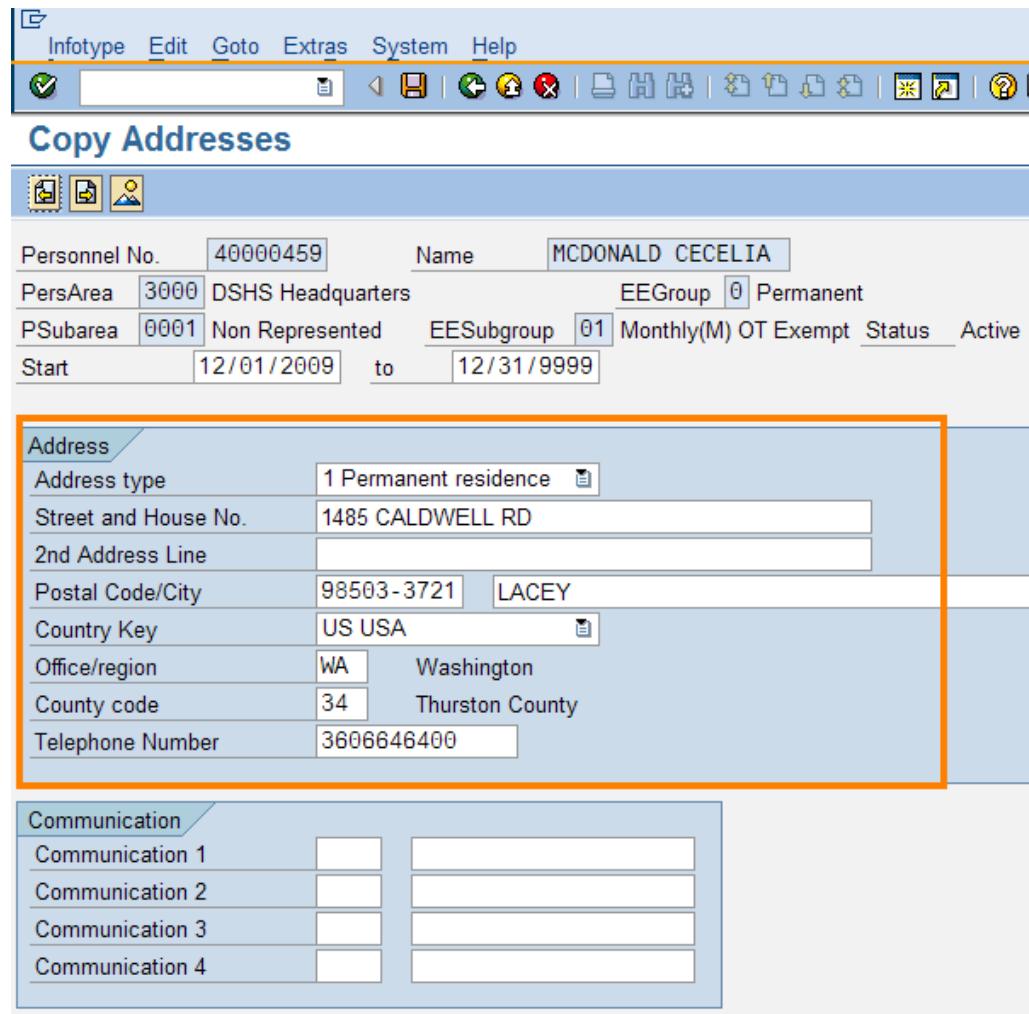
Task Type	01 Prob per to expire		
Date of Task	06/01/2010	Processing indicator	New task

**Reminder**

Reminder Date	05/25/2010
Lead/follow-up time	

# **Addresses (0006)**

- The Addresses infotype records and stores address data on an employee.
- For a rehire, verify and update any data on this infotype.
- When finished, click  **(Enter)** and then click  **(Save)**.



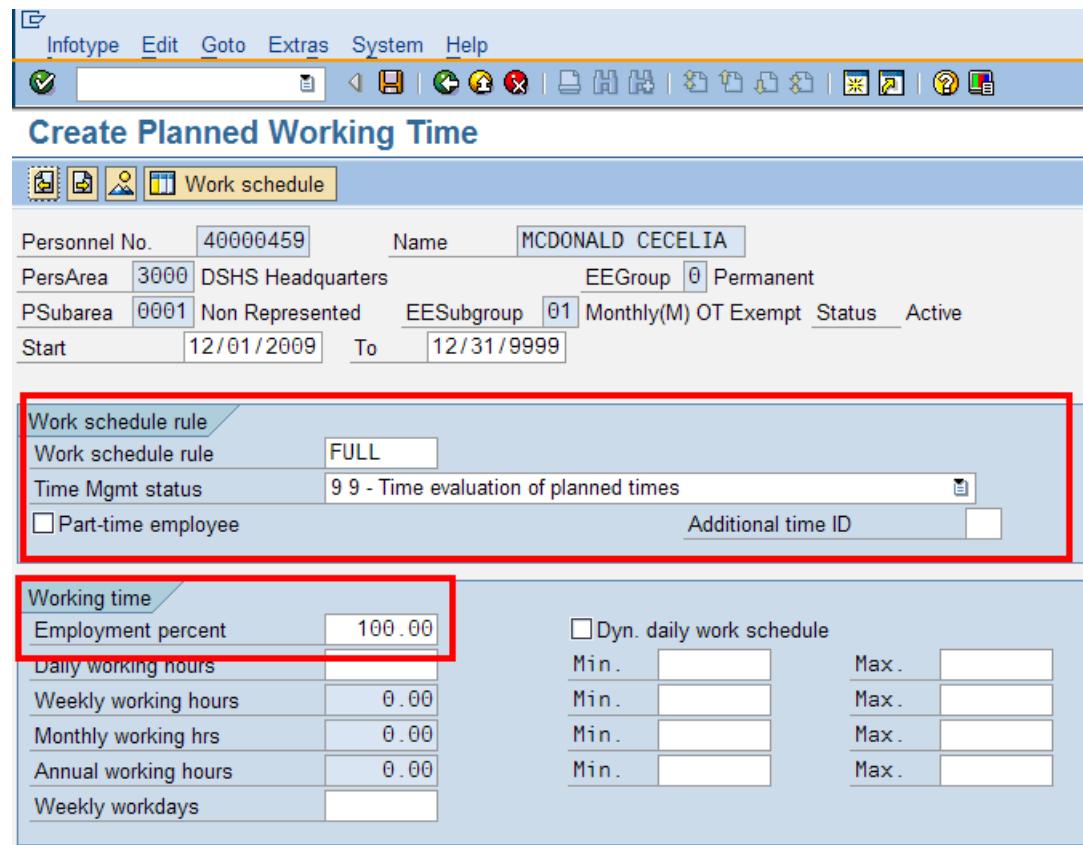
The screenshot shows the SAP HR Infotype Address (0006) screen. The top navigation bar includes Infotype, Edit, Goto, Extras, System, and Help. Below the menu is a toolbar with various icons. The main title is "Copy Addresses". The personnel number is 40000459, and the name is MCDONALD CECELIA. The person area is DSHS Headquarters, and the start date is 12/01/2009. The address section is highlighted with an orange border and contains the following data:

Address type	1 Permanent residence
Street and House No.	1485 CALDWELL RD
2nd Address Line	
Postal Code/City	98503-3721 LACEY
Country Key	US USA
Office/region	WA Washington
County code	34 Thurston County
Telephone Number	3606646400

The communication section below has four rows for Communication 1 through 4, each with two input fields.

# **Planned Working Time (0007)**

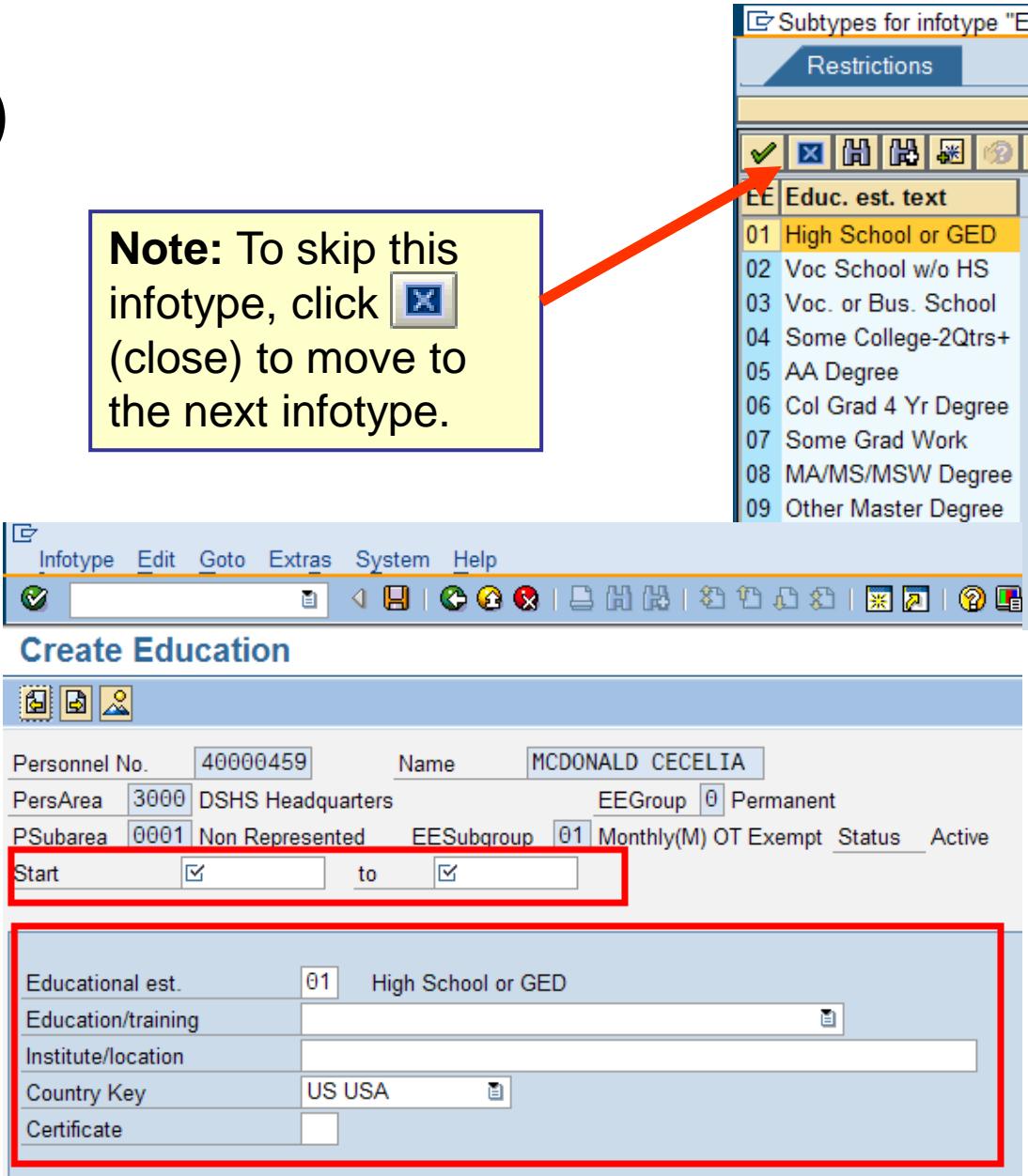
- The Planned Working Time infotype stores the employee's work schedule.
- Fields to complete:
  - **Work schedule rule**
    - Full – M-F 5-8s (Default)
  - **Time Mgmt status**
    - 9 9 Time evaluation of planned times (Default)
  - **Additional time ID**
  - **Employment percent**
    - 100 (Default)
- When finished, click  (**Enter**) and then click  (**Save**).



The screenshot shows the SAP Infotype Create Planned Working Time interface. At the top, there are tabs for Infotype, Edit, Goto, Extras, System, and Help. Below the tabs, there is a toolbar with various icons. The main title is "Create Planned Working Time". A sub-tab "Work schedule" is selected. The personnel number is 40000459, the name is MCDONALD CECELIA, and the work schedule rule is set to FULL. The time management status is set to 9 9 - Time evaluation of planned times. The employment percent is set to 100.00. The screenshot highlights the "Work schedule rule" section and the "Employment percent" field with red boxes.

# ***Education (0022)***

- The Education subtype indicates the type of education the employee has achieved.
- Use the Education infotype to document the details regarding education the employee has received.
- When finished, click  (**Enter**) and then click  (**Save**).



The screenshot shows the SAP HR interface for creating an education infotype. At the top right, a modal window titled "Subtypes for infotype "E"" lists various educational levels. A red arrow points from the "Close" button in this window to the "Close" button in a note box overlaid on the main screen. The note box contains the text: "Note: To skip this infotype, click  (close) to move to the next infotype." The main screen shows the "Create Education" infotype screen with fields for Personnel No., Name, PersArea, EEEGroup, PSubarea, Non Represented, EESubgroup, Monthly(M) OT Exempt, Status, and Active. The "Start" and "to" fields are highlighted with a red box. Below this, a large red box highlights the "Educational est.", "Education/training", "Institute/location", "Country Key", and "Certificate" fields. The "Educational est." field is set to "01 High School or GED".

# Date Specifications (0041)

- The Date Specifications infotype documents important dates in employment history.
- All previous dates will default and may need adjustments:

- Anniversary Date
- Appointment Date
- Original Hire Date
- Seniority Date
- Unbroken Srvc. Date
- Prsnl Holiday Eligibility

The screenshot shows the SAP Infotype 'Copy Date Specifications' interface. At the top, there's a toolbar with various icons and a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. The main title is 'Copy Date Specifications'. Below the title, there are three icons: a magnifying glass, a person icon, and a document icon. The personnel details are listed as follows:

Personnel No.	40000459	Name	MCDONALD CECELIA
PersArea	3000	DSHS Headquarters	EEGroup <input type="text"/> Permanent
PSubarea	0001	Non Represented	EESubgroup <input type="text"/> 01 Monthly(M) OT Exempt
Start	12/01/2009	to	12/31/9999

Below the personnel details is a section titled 'Date Specifications' enclosed in a red box. It contains two tables of date specifications:

Date type	Date
01 Anniversary Date	10/01/2007
03 Original Hire Date	10/01/2007
06 Separation Eff. Date	06/01/2008
18 Prsnl HolidayElgbty	10/01/2007

Date type	Date
02 Appointment Date	11/01/2007
05 Seniority Date	10/01/2007
07 Unbroken Srvc. Date	10/01/2007

# **Date Specifications (0041) – cont'd**

Date Specifications	
Date type	Date
01 Anniversary Date	10/01/2007
03 Original Hire Date	10/01/2007
06 Separation Eff. Date	06/01/2008
09 Vac Lv Frozen UpTo	06/01/2010
Date type	Date
02 Appointment Date	11/01/2007
05 Seniority Date	10/01/2007
07 Unbroken Svc. Date	10/01/2007
18 Prsnl HolidayElgbty	10/01/2007

- If necessary, create the date type Vac Lv Frozen Up to.

1. Click the  (matchcode) in the next available Date type field to open selection list.
2. Double-click to select.
3. Enter the date eligible.

**Note:** Remove the Separation Effective Date (Date Type 06).

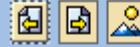
# **Date Specifications (0041) – cont'd**

- When finished, click  **(Enter)** and then click  **(Save).**

 Infotype Edit Goto Extras System Help

**Copy Date Specifications**



Personnel No.	40000459	Name	MCDONALD CECELIA
PersArea	3000	DSHS Headquarters	EEGroup <input type="checkbox"/> Permanent
PSubarea	0001	Non Represented	EESubgroup <input type="checkbox"/> 01 Monthly(M) OT Exempt Status Active
Start	12/01/2009	to	12/31/9999

**Date Specifications**

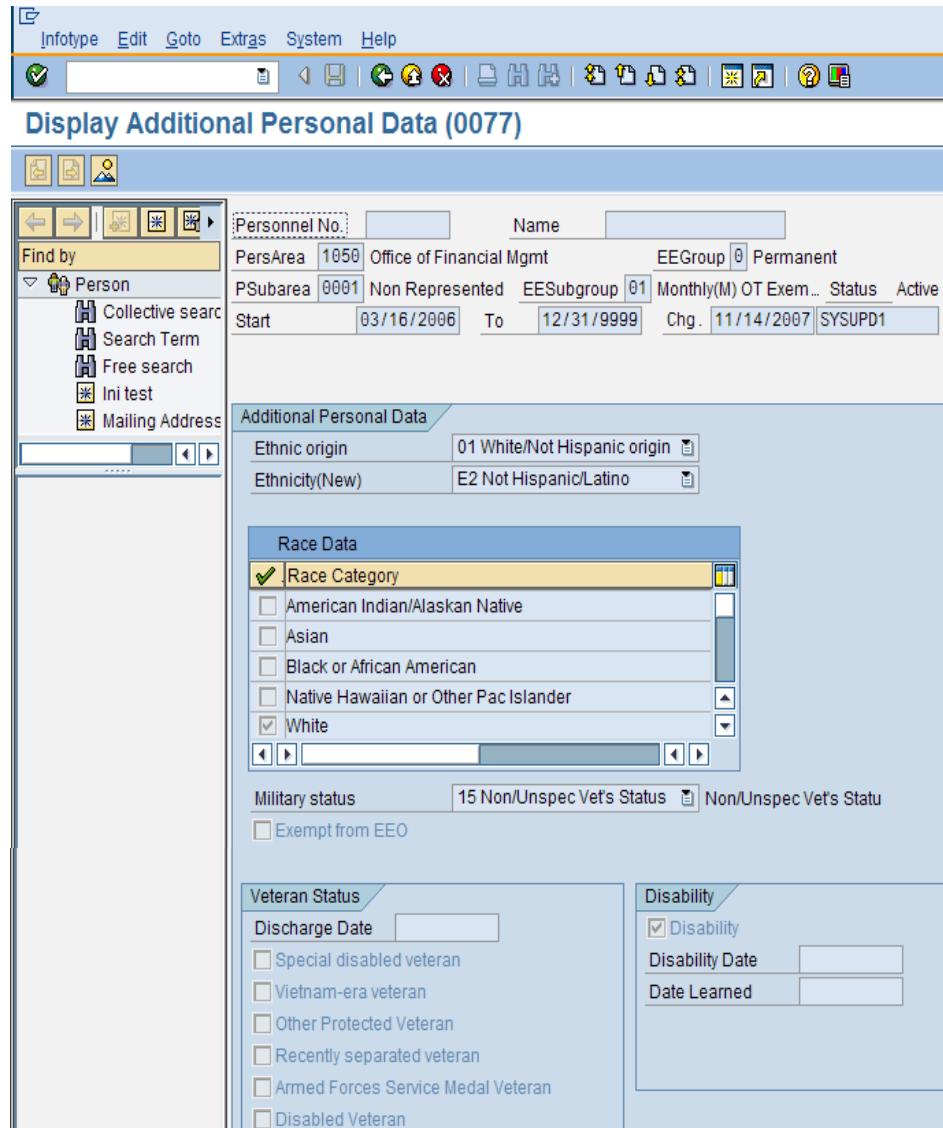
Date type	Date	Date type	Date
01 Anniversary Date	10/01/2007	02 Appointment Date	11/01/2007
03 Original Hire Date	10/01/2007	05 Seniority Date	10/01/2007
07 Unbroken Srvc. Date	10/01/2007	09 Vac Lv Frozen UpTo	06/01/2010
18 Prsnl HolidayElgbty	10/01/2007		

# Adjusting Service Dates – Rehire

- When performing a Rehire action, you can adjust the service dates for an employee who has returned to the organization. Updates are important for a number of reasons:
  - For retirement benefits for employees who have worked for other covered jurisdictions, higher education institutions, or have served in the military.
  - To accrue seniority for full-time employees based on seniority dates or union contracts.
  - To ensure fairness within the organization if layoffs are needed.
- Before adjusting service dates, refer to WAC, Agency Policy, and CBA's for rules on updating date specifications.
- In HRMS, service date adjustment is NOT an automatic process. This process needs to be completed manually.

# ***Additional Personal Data (0077)***

- The Additional Personal Data infotype documents an employee's Equal Employment Opportunity (EEO) information.
- For a rehire, verify and correct any data on this infotype.
- When finished, click  (Enter) and then click  (Save). If information is correct, do not save and click  (Next Record).



The screenshot shows the SAP Infotype 'Display Additional Personal Data (0077)' interface. The top navigation bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the title, there are search and filter icons. The main area displays personnel details: Personnel No., Name, PersArea (1050), Office of Financial Mgmt, EEGroup (0 Permanent), PSubarea (0001), Non Represented, EESubgroup (01 Monthly(M) OT Exem...), Status (Active), Start (03/16/2006), To (12/31/9999), Chg. (11/14/2007), and Chg. (SYSUPD1). A 'Find by' sidebar lists options like 'Person' (selected), 'Collective search', 'Search Term', 'Free search', 'Ini test', and 'Mailing Address'. The 'Additional Personal Data' section contains fields for Ethnic origin (01 White/Not Hispanic origin) and Ethnicity(New) (E2 Not Hispanic/Latino). The 'Race Data' section shows a list of race categories: American Indian/Alaskan Native, Asian, Black or African American, Native Hawaiian or Other Pac Islander, and White (which is checked). The 'Military status' field is set to 15 Non/Unspec Vet's Status. The 'Veteran Status' section includes fields for Discharge Date and a list of veterans: Special disabled veteran, Vietnam-era veteran, Other Protected Veteran, Recently separated veteran, Armed Forces Service Medal Veteran, and Disabled Veteran. The 'Disability' section includes fields for Disability Date and Date Learned.

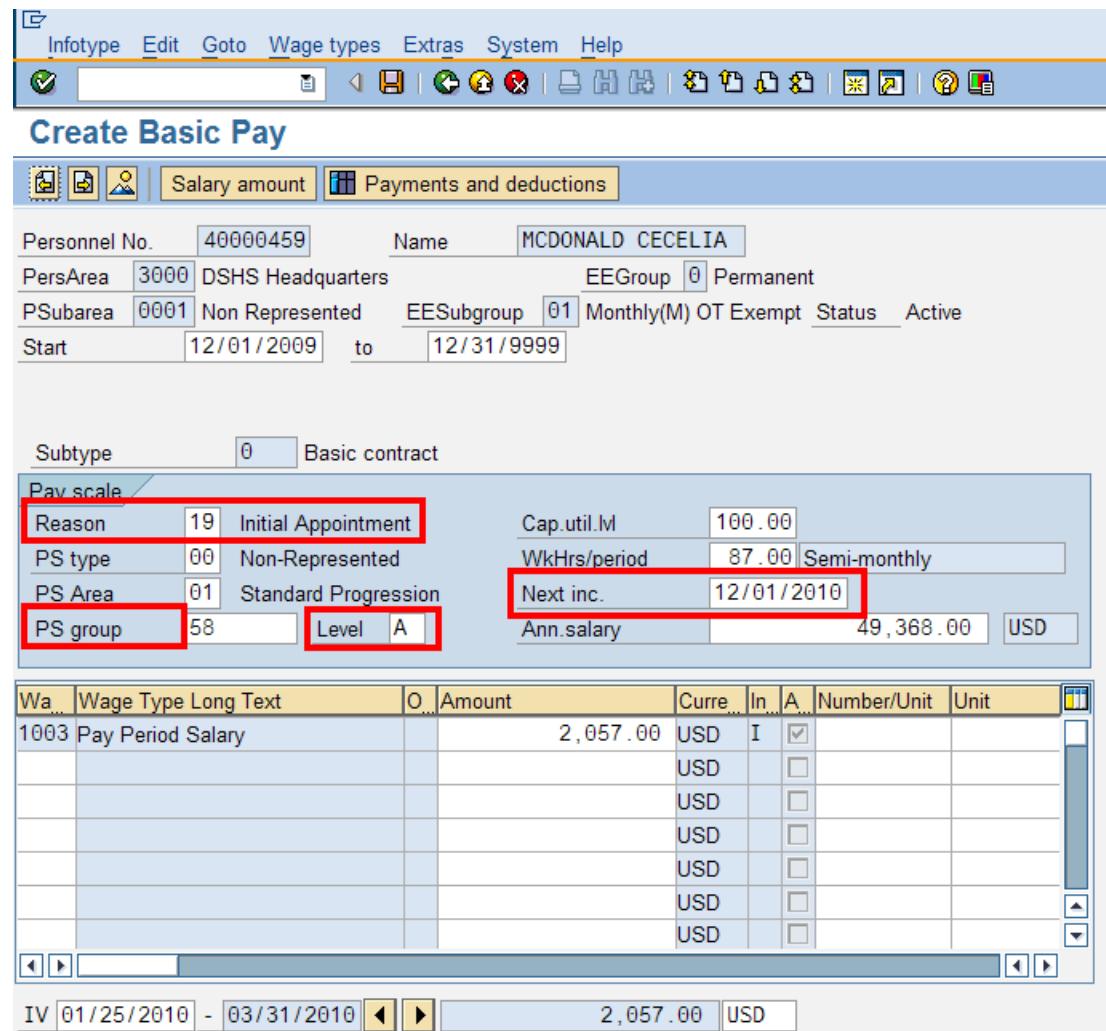
# **Basic Pay (IT0008)**

- The *Basic Pay* infotype records pay scale and salary information for an employee.

- Fields to complete:

- Reason
- Next Increase
- PS Level
- Capacity utility level  
*(Defaults in)*

- When finished, click  (Enter) and then click  (Save).



The screenshot shows the SAP Basic Pay (IT0008) infotype creation screen. The top navigation bar includes Infotype, Edit, Goto, Wage types, Extras, System, and Help. Below the navigation is a toolbar with various icons. The main title is "Create Basic Pay". A toolbar below the title has tabs for "Salary amount" and "Payments and deductions". The "Salary amount" tab is selected. The personnel number is 40000459, name is MCDONALD CECELIA, PersArea is 3000 (DSHS Headquarters), EEGroup is Permanent, PSubarea is 0001 (Non Represented), EESubgroup is 01 (Monthly(M) OT Exempt), Status is Active, and the start date is 12/01/2009 with an end date of 12/31/9999. The "Subtype" field is set to 0 (Basic contract). The "Pay scale" section contains fields for Reason (19, Initial Appointment), PS type (00, Non-Represented), PS Area (01, Standard Progression), PS group (58), Level (A), Cap.util.M (100.00), WkHrs/period (87.00, Semi-monthly), Next inc. (12/01/2010), and Ann.salary (49,368.00, USD). The "Wage Type Long Text" table lists a single row for "1003 Pay Period Salary" with an amount of 2,057.00, currency USD, and indicator I checked. At the bottom, the date range is IV 01/25/2010 - 03/31/2010, and the total amount is 2,057.00 USD.

# Personnel Administration / Payroll Handoff

- After all necessary personnel updates are made to the employee's information, the employee information is transferred to the Payroll Processor.
- The Payroll Processor records the following infotypes:
  - *Bank Details (0009)*
  - *Recurring Payments / Deductions (0014)*
  - *Withholding Info W4/W5 US (0210)*
  - *Additional Withholding Info Us (0234)*
  - *General Benefits Information (0171)*
- Once the pay and benefits information is entered into HRMS, the employee has been rehired and is eligible for pay.



After saving *Basic Pay (0008)*,  
click  (**Exit**) to exit the action.

# Update to Rehire Action

- When rehiring an employee who was not previously employed at the your agency, you will need to perform the following:
  - Once *Organizational Assignment* (0001) has been saved and the Delimit Vacancy option has been chosen, you will close out the ‘Subtypes for infotype Education’ pop-up window. (This will back out of the Rehire action and take you back to the Personnel Actions screen (**PA40**).)
  - \*Restart the transaction (using the instructions on pg. 56) and forward through the already completed infotypes and continue to update/create the remaining infotypes.
- Please contact the Department of Personnel’s Service Center for any further assistance.

# **HRMS**

# **Activity**



**Rehire an Employee**

# Review Questions

- What is the difference between a new hire and a rehire?

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- True or False – During the Rehire action, it is necessary to re-create all employee infotypes in HRMS?

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# **Change of Status**

# Change of Status Overview

Upon completion of this section you will be able to:

- Define the key terms and concepts associated with the Change of Status action.
- Explain the overall business process flow associated with the Change of Status action.
- Navigate through the Change of Status infotypes and understand the importance of the information in each infotype.
- Review a Change of Status action.

# **Change of Status**

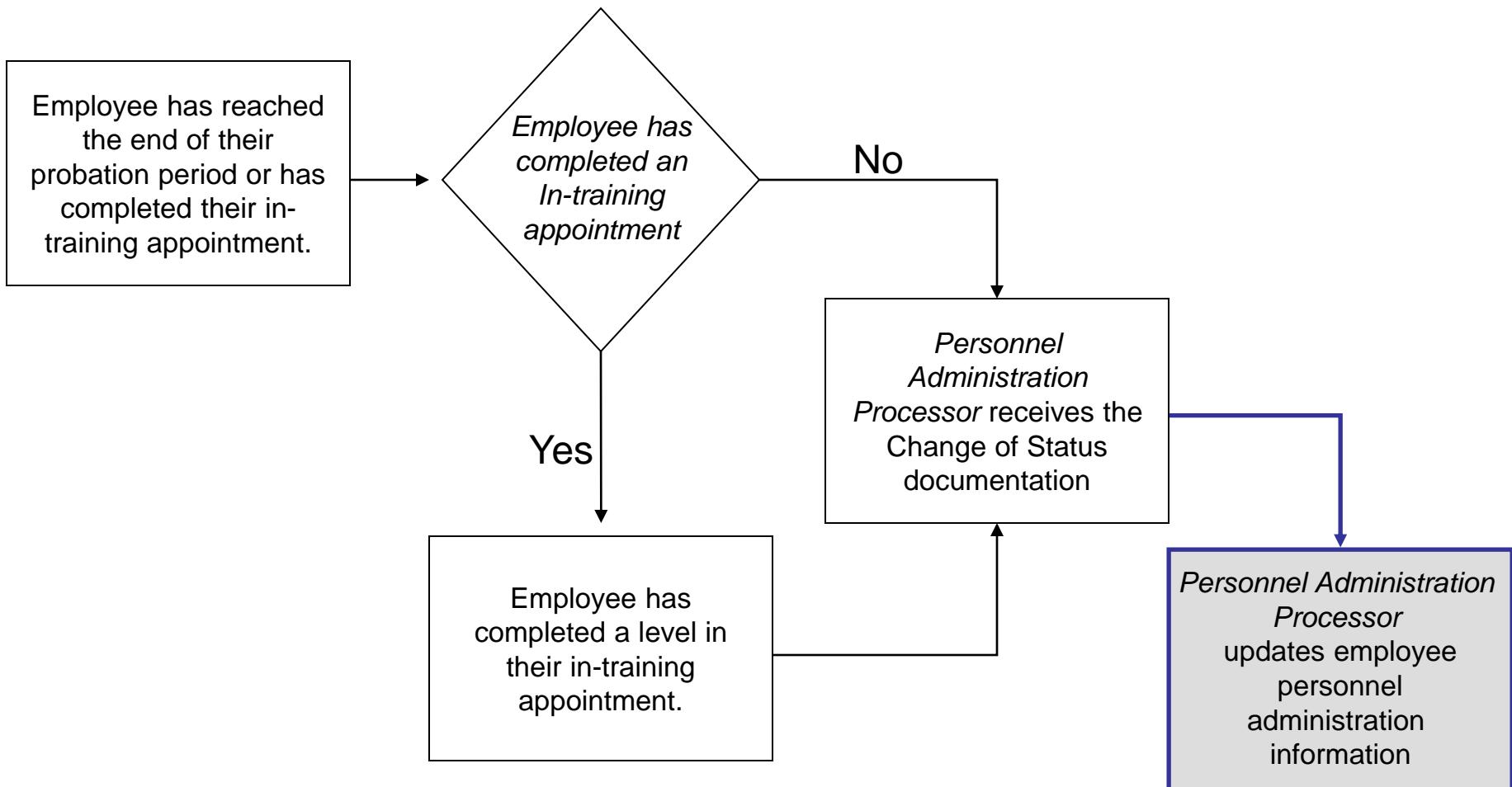
A **Change of Status** occurs when an employee has reached the end of their probationary appointment or has completed their in-training appointment.



- 
- When an employee reaches the end of their probationary period, their status is changed to ‘permanent’.
  
  - ---

    - When an employee completes their In-training Probationary Appointment at a lower job class level, their status is changed to ‘trial service’.
      - In-training appointments may consist of multi-levels in which the status would be changed to ‘In-training/Trial Service’.

# Change of Status Process Flow



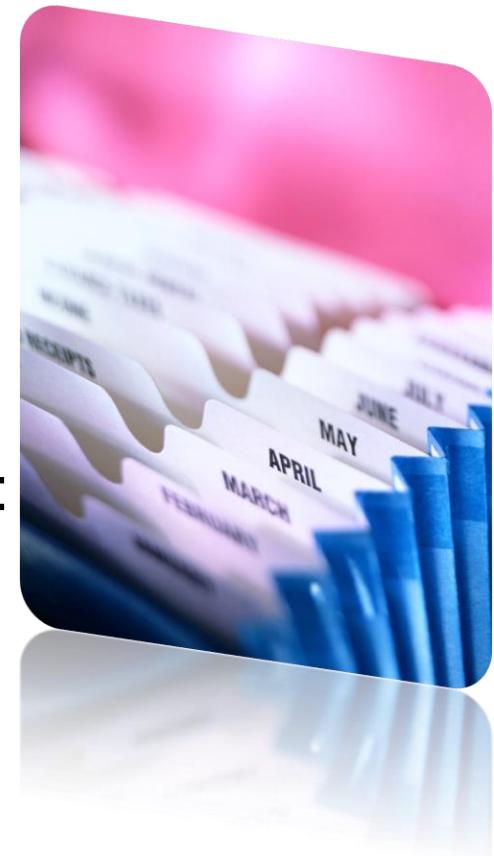
Key:

= Non-HRMS Step

= HRMS Entry

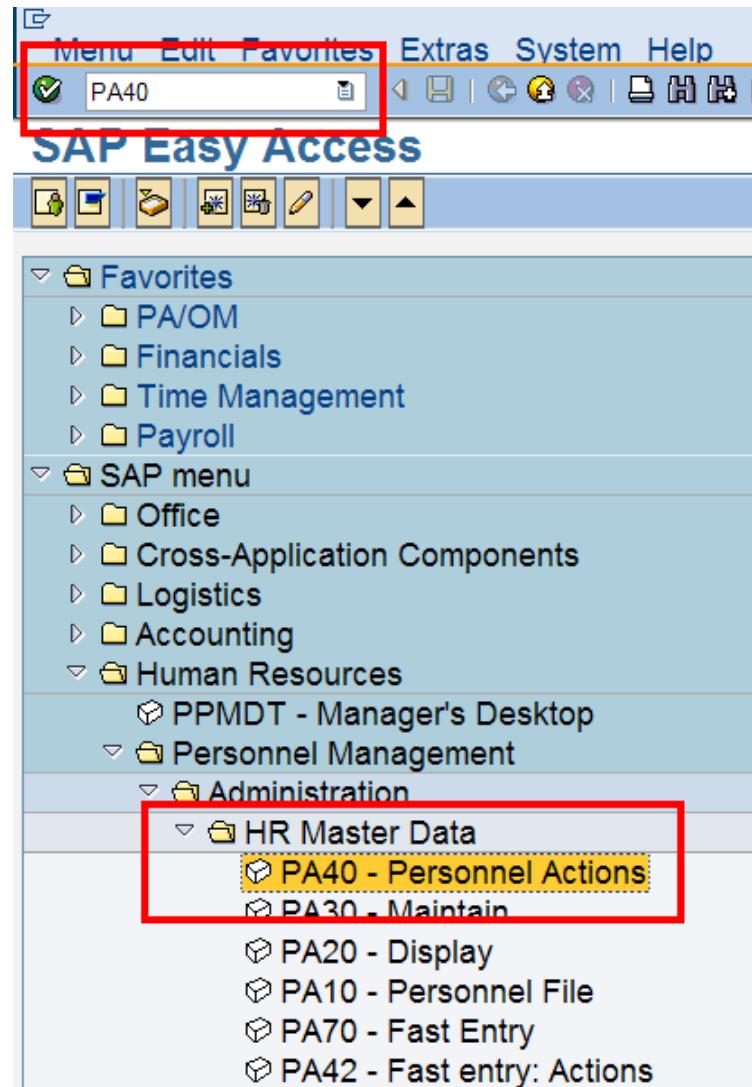
# Change of Status Infotypes

- Update the following infotypes during the Change of Status action:
  - *Actions* (0000)
  - *Organizational Assignment* (0001)
  - *Contract Elements* (0016)
  
- Use **PA30** to maintain the following infotype:
  - *Monitoring of Task* (0019)



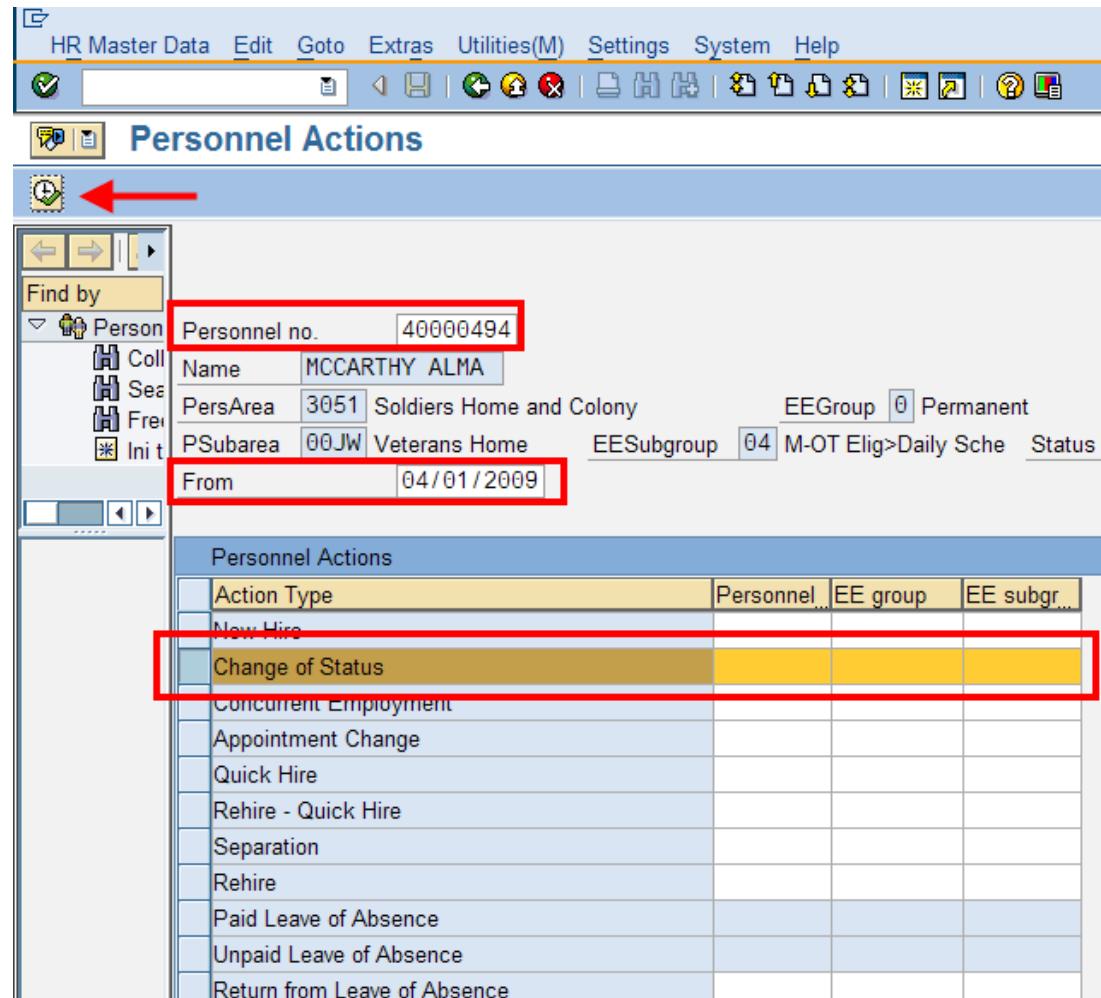
# Change of Status

- To create a Change of Status Action using the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
  - Or enter transaction code **PA40** in the **Command** field
- Using the action will ensure that all required infotype records are created.



# Change of Status Personnel Action

- A personnel number is required to process a Change of Status action.
- Fields to complete:
  - From (Date of action)
  - Personnel no.
- To access the Change of Status action, click the box to the left of Change of Status.
- Then click  (Execute).



# **Actions (0000)**

- The Actions infotype records the Change of Status in HRMS, as well as provide a reason for the action.
- Fields to complete
  - **Reason for Action** (use matchcode)
- When finished, click  (**Enter**) and then click  (**Save**).

Infotype Edit Goto Extras System Help

 Copy Actions (0000)  

Pers.No.	40000494			
Name	MCCARTHY ALMA			
PersArea	3051 Soldiers Home and Colony	EEGroup	0 Permanent	
PSubarea	00JW Veterans Home	EESubgroup	04 M-OT Elig>Daily Sche	Status
Start	04/01/2009	to	12/31/9999	

Personnel action

Action Type	UJ Change of Status
Reason for Action	06 Probationary Period Completed

Status

Employment	3 Active
------------	----------

Organizational assignment

Position	70042563 LPN 2
Personnel area	3051 Soldiers Home and Colony
Employee group	0 Permanent
Employee subgroup	04 M-OT Elig>Daily Sche

Additional actions

# **Organizational Assignment (0001)**

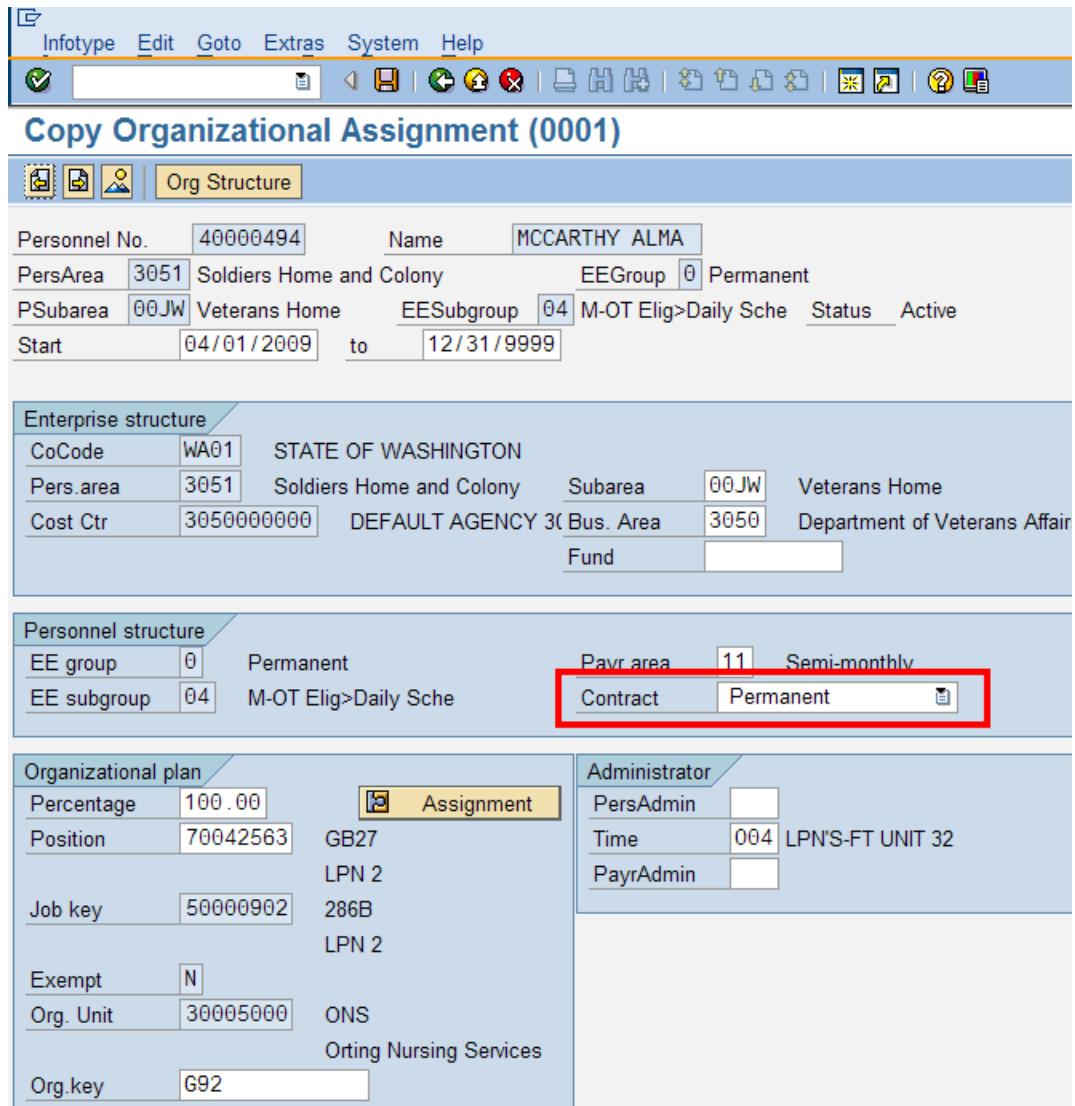
- The Organizational Assignment infotype records the assignment of an employee in the Organizational Structure.

- Field to complete:

- Contract

- Permanent

- When finished, click  **(Enter)** and then click  **(Save)**.



The screenshot shows the SAP Infotype 0001 - Copy Organizational Assignment (0001) screen. The top navigation bar includes Infotype, Edit, Goto, Extras, System, and Help. The toolbar contains various icons for file operations like Open, Save, Print, and Copy.

**Personnel No.:** 40000494 **Name:** MCCARTHY ALMA

**PersArea:** 3051 Soldiers Home and Colony **EEGroup:** 0 Permanent

**PSubarea:** 00JW Veterans Home **EESubgroup:** 04 M-OT Elig>Daily Sche **Status:** Active

**Start:** 04/01/2009 **to:** 12/31/9999

**Enterprise structure:**

CoCode	WA01	STATE OF WASHINGTON
Pers.area	3051	Soldiers Home and Colony
Cost Ctr	3050000000	DEFAULT AGENCY 30 Bus. Area
	3050	Department of Veterans Affairs
		Fund

**Personnel structure:**

EE group	0	Permanent
EE subgroup	04	M-OT Elig>Daily Sche
Payr area	11	Semi-monthly
Contract	Permanent	

**Organizational plan:**

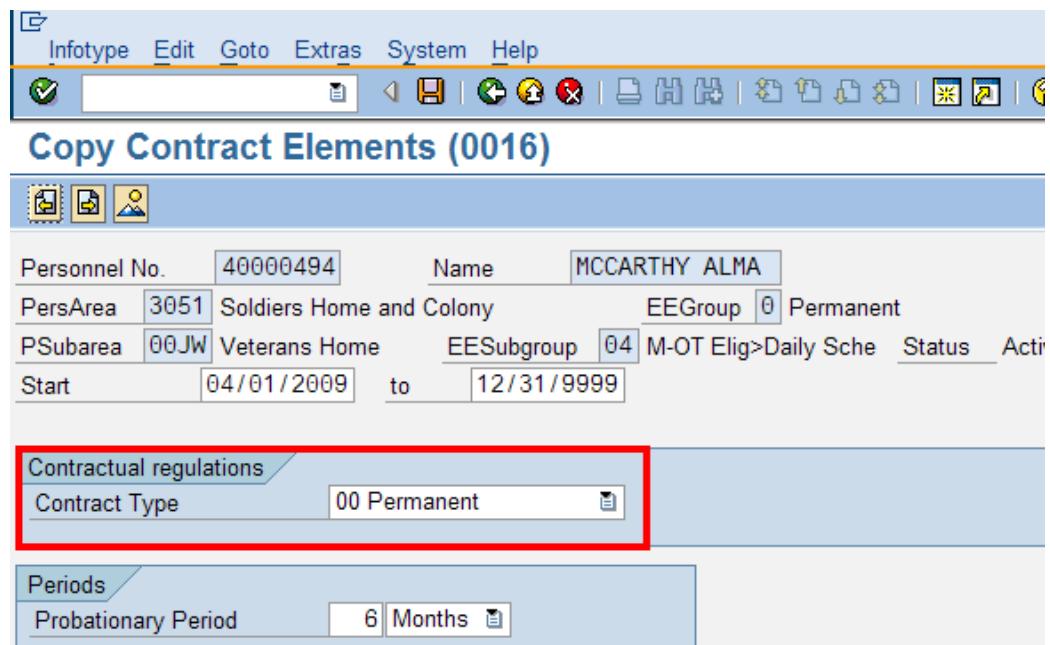
Percentage	100.00	Assignment
Position	70042563	GB27
Job key	50000902	LPN 2
		286B
Exempt	N	LPN 2
Org. Unit	30005000	ONS
		Orting Nursing Services
Org.key	G92	

**Administrator:**

PersAdmin		
Time	004	LPN'S-FT UNIT 32
PayrAdmin		

# **Contract Elements (0016)**

- The Contract Elements infotype if the employee's state status (permanent or non-permanent).
- Fields required to complete:
  - Start
  - Contract type
- Optional field:
  - Probationary period
- When finished, click  (Enter) and then click  (Save).



The screenshot shows the SAP Infotype 'Copy Contract Elements (0016)' interface. At the top, there is a toolbar with various icons. Below the toolbar, the title 'Copy Contract Elements (0016)' is displayed. The main area contains several input fields:

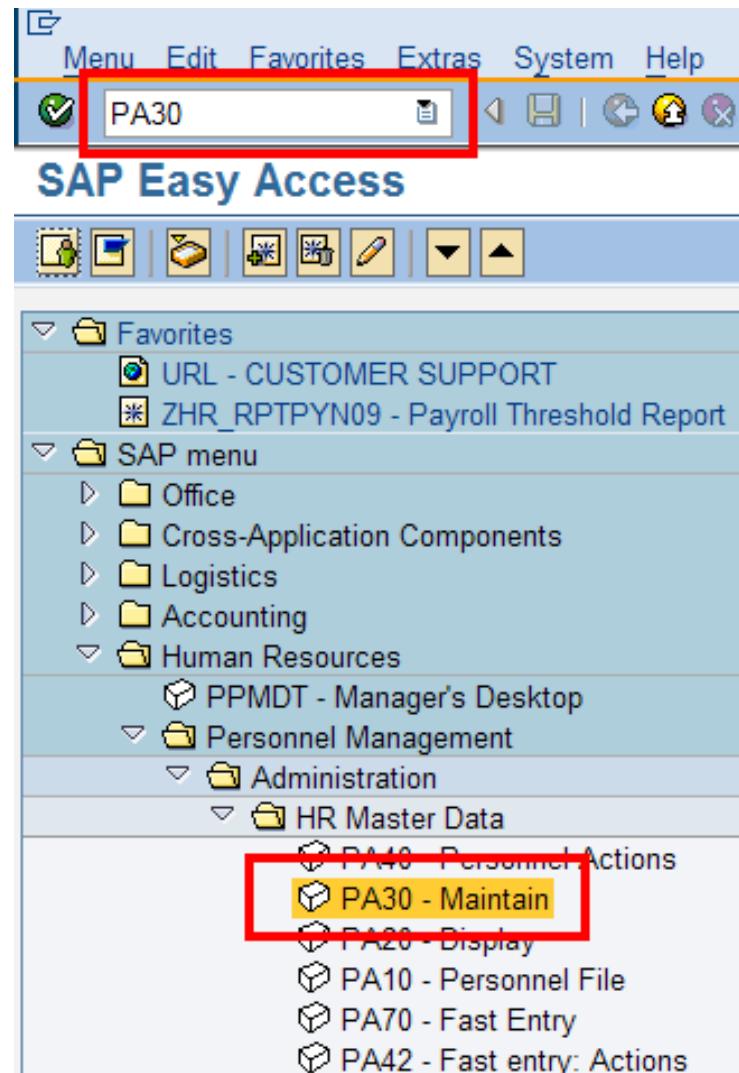
Personnel No.	40000494	Name	MCCARTHY ALMA
PersArea	3051	Soldiers Home and Colony	EEGroup 0 Permanent
PSubarea	00JW	Veterans Home	EESubgroup 04 M-OT Elig>Daily Sche
Start	04/01/2009	to	12/31/9999

A red box highlights the 'Contractual regulations' section, which includes a 'Contract Type' field set to '00 Permanent'.

Below this, another section labeled 'Periods' shows a 'Probationary Period' of '6 Months'.

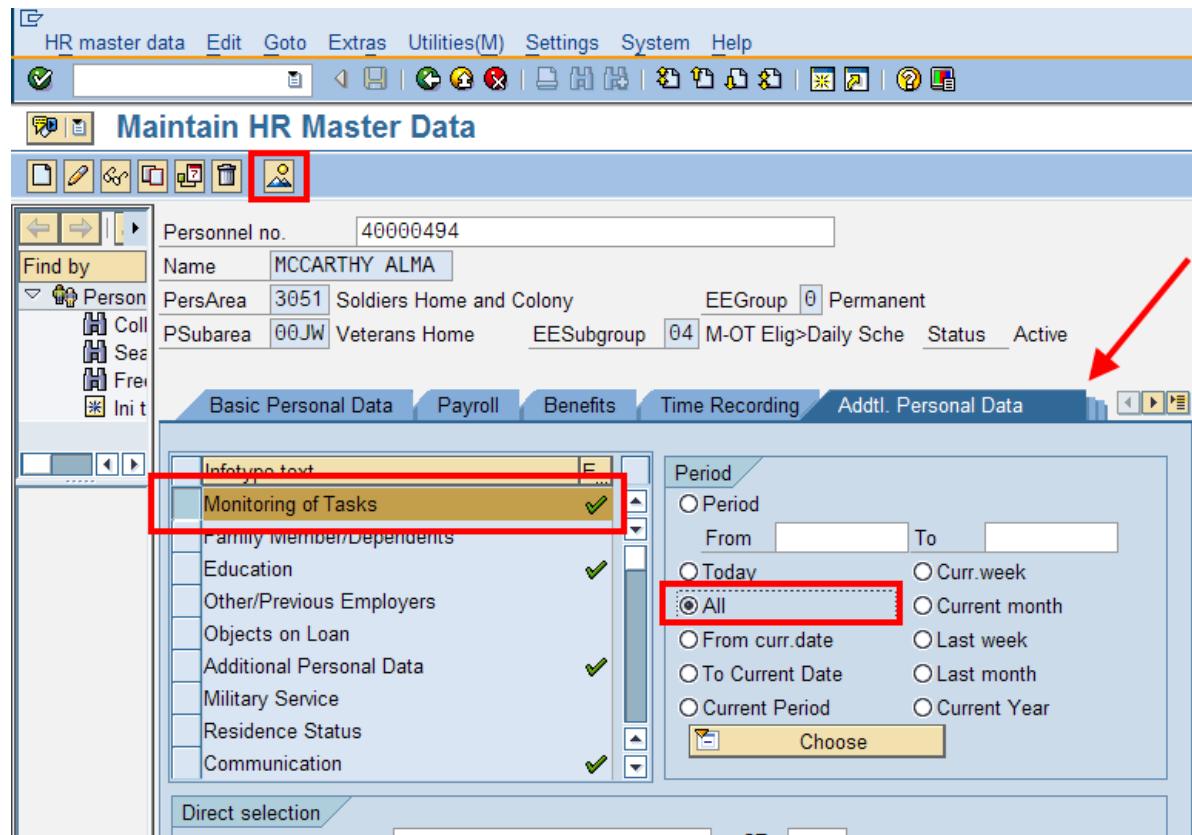
# **Monitoring of Task (0019)**

- When the employee's probation period has ended, the *Monitoring of Task* (0019) must be updated.
- To maintain the Monitoring of Task infotype:
  - Follow menu path: Human Resources → Personnel Management → Administration → HR Master Data → Maintain
  - Or enter transaction code **PA30** in the **Command** field



# Maintain *Monitoring of Task* (0019)

1. Click the **Addtl. Personal Data** tab.
2. Click the box to the left of the *Monitoring of Task* (0019) to select.
3. In the 'Period' section, click **All** (All).
4. Click  **(Overview)** for an overview of all actions associated with the *Monitoring of Tasks* (0019).



# Monitoring of Task (0019)

4. Select the appropriate record.

- **Task Type**

- Prob per to expire

5. Click  (**Copy**)

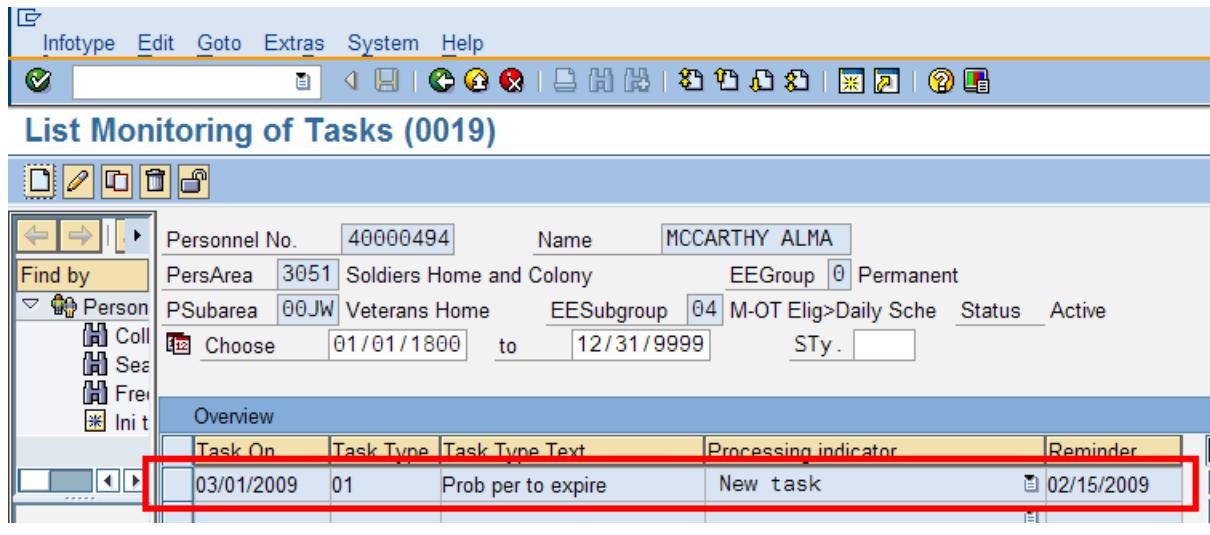
6. Fields to complete:

- **Date of Task**

- **Processing indicator**

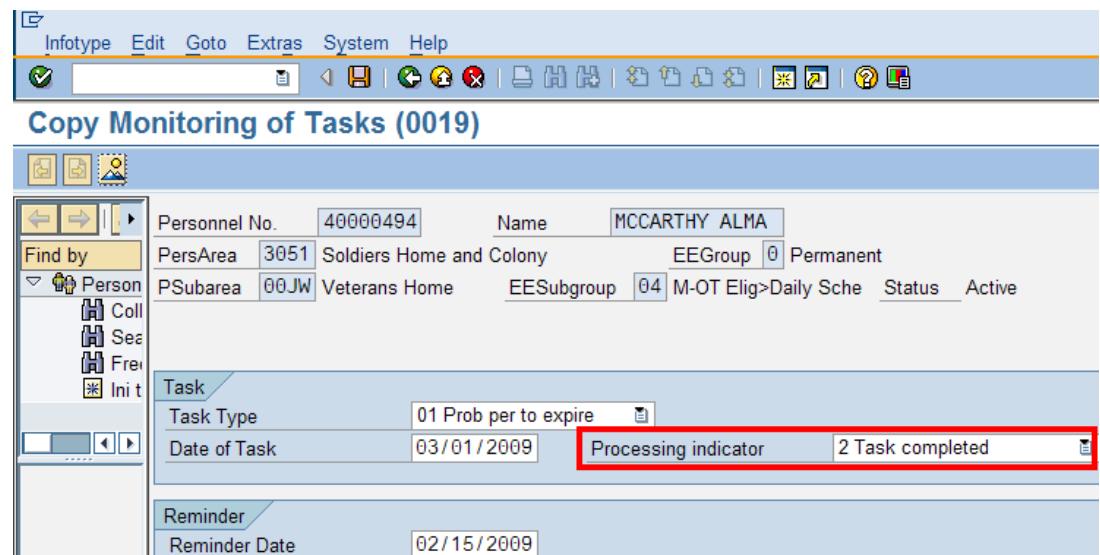
- *Task Completed*

7. When finished, click  (**Enter**) and then click  (**Save**).



The screenshot shows the SAP List Monitoring of Tasks (0019) interface. The task record being edited has the following details:

Task On	Task Type	Task Type Text	Processing indicator	Reminder
03/01/2009	01	Prob per to expire	New task	02/15/2009



The screenshot shows the SAP Copy Monitoring of Tasks (0019) interface. The task record has been updated with the following details:

Task
Task Type: 01 Prob per to expire Date of Task: 03/01/2009 Processing indicator: 2 Task completed Reminder Date: 02/15/2009

# Change of Status resources



## ■ See OLQR User Procedures:

- [Employee Status Update to Permanent at End of Probationary Appointment](#)
- [Employee Status Update to Permanent at Completion of In-Training Appointment](#)

# **HRMS**

# **Activity**



**Process Employee Change of Status**

# **Appointment Change**

# Appointment Change Overview

- Upon completion of this section, you will be able to:
  - Describe the key terms and concepts associated with the Appointment Change action.
  - Explain the overall business process flow associated with the Appointment Change action.
  - Navigate through the Appointment Change action and understand the importance of the information in each infotype.
  - Process an Appointment Change action.

# Employee Appointment Change

- Use the Appointment Change action for appointments within the agency and appointments between different agencies.

- Examples include:

- \_\_\_\_\_
    - \_\_\_\_\_
    - \_\_\_\_\_

- **Reassignments**
    - **Reallocations**



# Appointment Change – Types

- Promotion

- Upgrade from an employee's current job level.

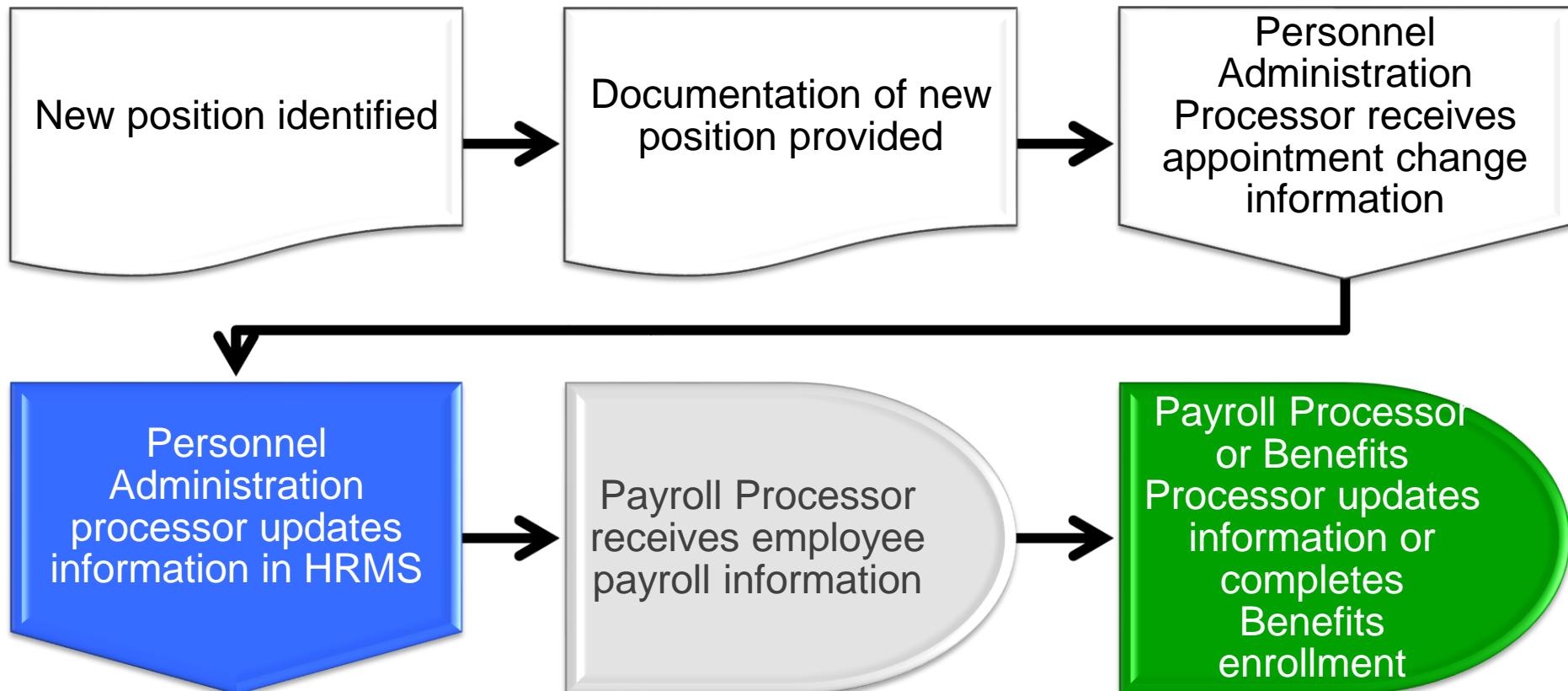
- Demotion

- Downgrade from an employee's current job level.

- Transfer

- Movement of an employee within the same agency.
  - Movement of an “active” employee between different agencies.

# Appointment Change Process Flow



## Legend



Business Process



PA Processor  
Role



HRMS  
Entry



Payroll Processor  
Role

# Appointment Change Action

- The Appointment Change action is similar to the Rehire action.
  - Many infotypes that were created in the Hire action are reviewed and updated during the Appointment Change action.
  - The system automatically walks you through the necessary infotypes that need changing.
- **Note:** Pay special attention to infotypes that can change dramatically with an appointment change including:
  - *Organizational Assignment* (0001)
  - *Planned Working Time* (0007)
  - *Basic Pay* (0008)
    - Remember: The system automatically delimits the old position effective the day before the new position begins (according to the adjusted start date for the new position).

# Appointment Change Action – cont'd

- An employee can be permanent in one agency and take a temporary appointment in the gaining agency. In this case, status should remain permanent with the losing agency.
- The information traveling between the losing agency and the gaining agency can be communicated in a number of ways, depending on agency policy:
  - Note to employee's non-electronic file
  - E-mail
  - Phone call
  - Transmittal form designated by the agency

# Appointment Change Action – cont'd

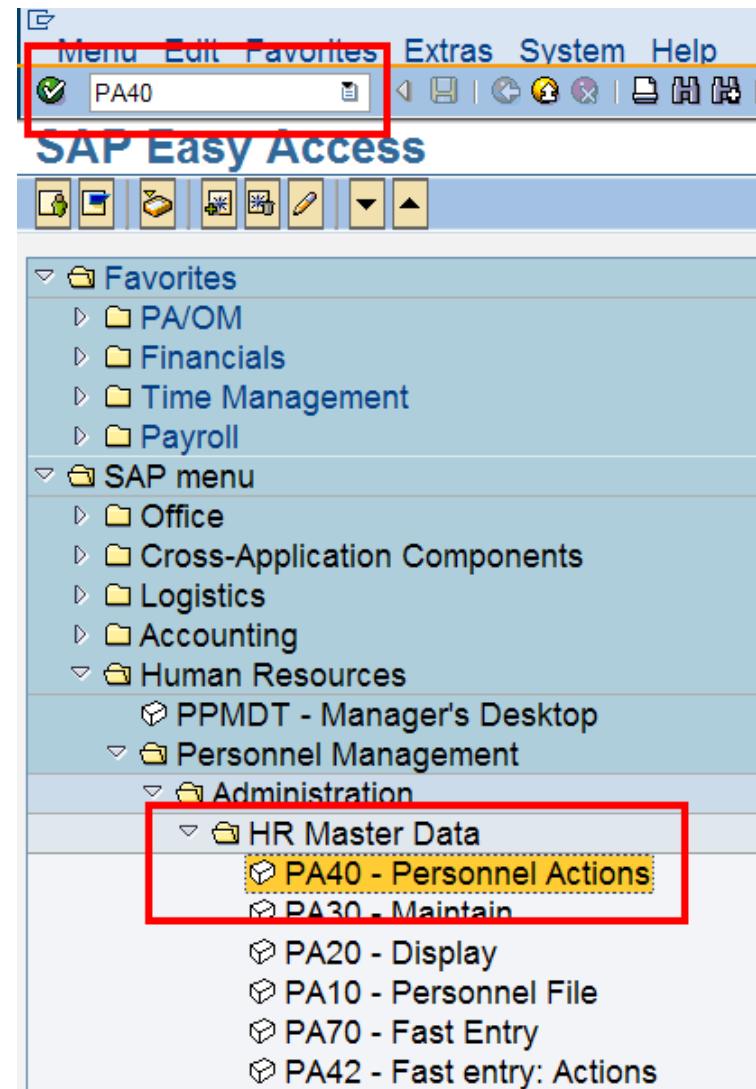
- The gaining agency is able to pull all information from the losing agency – executing the appointment change without having to depend on another agency to complete a separation first.
  - Such as:
    - Leave Balances
    - Deductions
    - Benefits
- For security purposes, you may need to contact the losing agency for detail salary information for the employee you are hiring.

# Appointment Change Infotypes

- Update the following infotypes during the Appointment Change action including:
  - *Actions (0000)*
  - *Organizational Assignment (0001)*
  - Cost Distribution (0027)
  - *Contract Elements (0016)*
  - *Monitoring of Tasks (0019)*
  - *Planned Working Time (0007)*
  - *Date Specifications (0041)*
  - *Basic Pay (0008)*

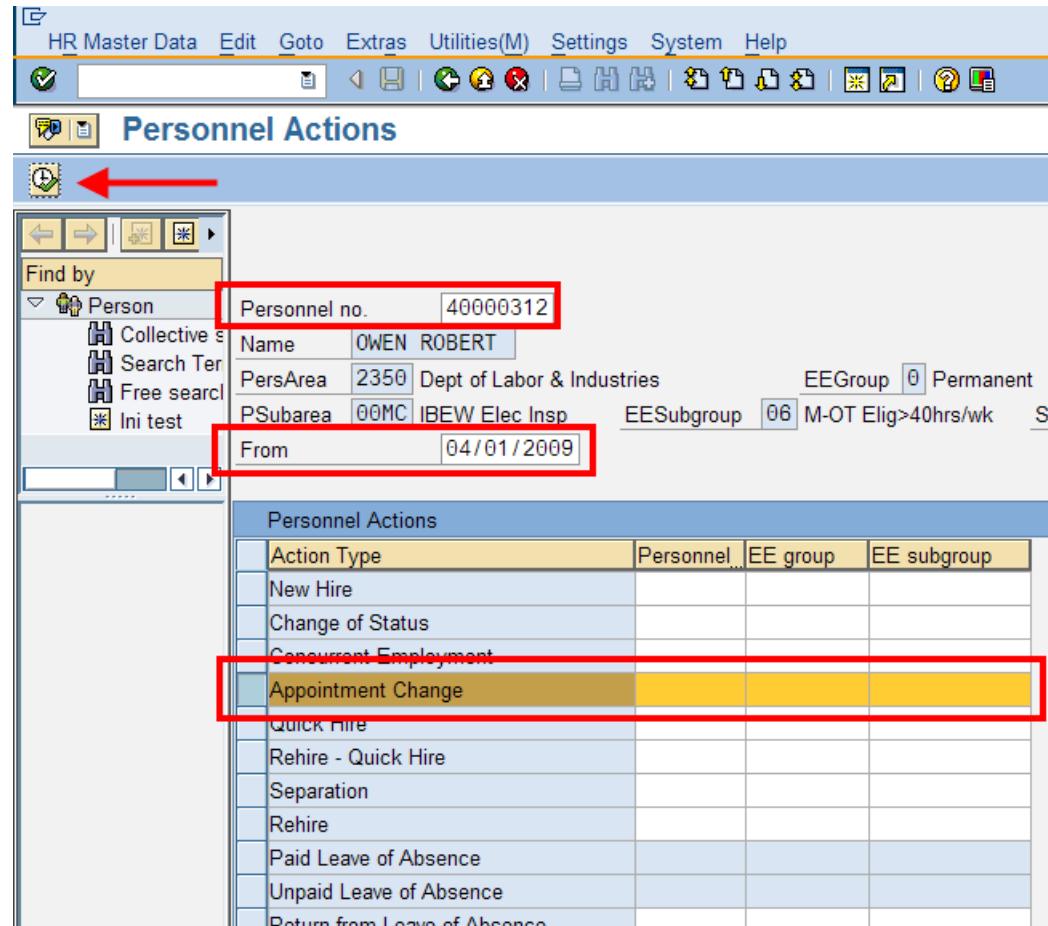
# Appointment Change Action

- To create an Appointment Change Action using the menu path:
  - Follow Human Resources  
→ Personnel Management  
→ Administration → HR Master Data → Personnel Actions
  - Or enter transaction code **PA40** in the **Command** field
- Using the action will ensure that all required infotype records are created.



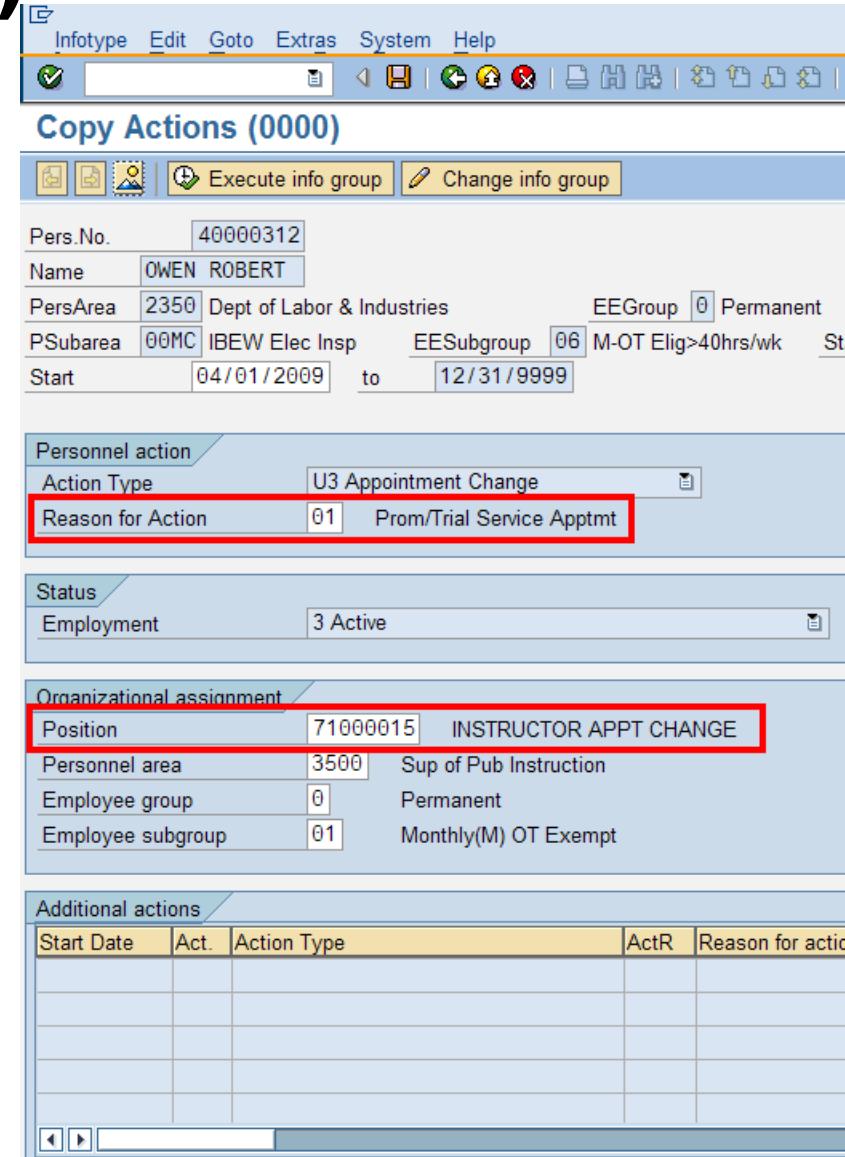
# Appointment Change Personnel Action

- A Personnel Number is required to process an Appointment Change.
- To access the Appointment Change action, click the box to the left of *Appointment Change*.
- Fields to complete-
  - **From (Date of Hire)**
  - **Personnel no.**
- Then click  (**Execute**).



# **Actions Infotype (0000)**

- The Actions infotype records the action and places the new employee into a new organizational assignment.
- Fields to complete:
  - **Reason for Action** (use matchcode)
  - **Position**
- Click  (Enter) to validate and populate the following fields:
  - Personnel Area
  - Employee Group
  - Employee Sub-group
- When finished, click  (Enter) and then click  (Save).



The screenshot shows the SAP Infotype 0000 - Copy Actions (0000) screen. The top menu bar includes Infotype, Edit, Goto, Extras, System, and Help. Below the menu is a toolbar with various icons. The main title is "Copy Actions (0000)". Below the title are two buttons: "Execute info group" and "Change info group". The main data area contains several input fields:

Pers.No.	40000312
Name	OWEN ROBERT
PersArea	2350 Dept of Labor & Industries
PSubarea	00MC IBEW Elec Insp
EESubgroup	06 M-OT Elig>40hrs/wk
Start	04/01/2009 to 12/31/9999

Below these are sections for "Personnel action" and "Organizational assignment". The "Personnel action" section has "Action Type" set to "U3 Appointment Change" and "Reason for Action" set to "01 Prom/Trial Service Apptmt". The "Organizational assignment" section has "Position" set to "71000015 INSTRUCTOR APPT CHANGE", "Personnel area" set to "3500 Sup of Pub Instruction", "Employee group" set to "0 Permanent", and "Employee subgroup" set to "01 Monthly(M) OT Exempt". At the bottom is an "Additional actions" table with columns for Start Date, Act., Action Type, ActR, and Reason for action.

# ***Delimit Message***

- The delimit message will appear when validating the information entered on the infotype. The message reads “**Record valid from XX/XX/XXXX to XX/XX/XXXX delimited at end**”.



Record valid from 06/01/2008 to 12/31/9999 delimited at end

- Continue to **(Enter)** through message until the “Save Your Entries” prompt appears.



Save your entries

# **Organizational Assignment (0001)**

- The Organizational Assignment infotype records the assignment of an employee in the Organizational Structure.

- Field required to complete:

- **Contract**

- Permanent

- Optional fields:

- Org. Key
  - Administrator (Time)

- When finished, click (**Enter**) and then click (**Save**).

- If no changes made to the infotype, continue to save.

The screenshot shows the SAP Infotype Copy Organizational Assignment (0001) screen. The top navigation bar includes Infotype, Edit, Goto, Extras, System, and Help. The toolbar contains various icons for file operations like copy, paste, and search. The main title is "Copy Organizational Assignment (0001)".

**Personnel No.**: 40000312, **Name**: OWEN ROBERT

**PersArea**: 2350, **Dept of Labor & Industries**, **EEGroup**: 0, **Permanent**

**PSubarea**: 00MC, **IBEW Elec Insp**, **EESubgroup**: 06, **M-OT Elig>40hrs/wk**

**Status**: Active, **Start**: 04/01/2009, **to**: 12/31/9999

**Enterprise structure**

<b>CoCode</b> : WA01	STATE OF WASHINGTON
<b>Pers.area</b> : 3500	Sup of Pub Instruction
<b>Cost Ctr</b> : 3500000000	DEFAULT AGENCY 35 Bus. Area: 3500
Fund	

**Personnel structure**

<b>EE group</b> : 0	Permanent	<b>Payr.area</b> : 11	Semi-monthly
<b>EE subgroup</b> : 01	Monthly(M) OT Exempt	<b>Contract</b>	Permanent

**Organizational plan**

<b>Percentage</b> : 100.00	
<b>Position</b> : 71000015	APPT0 INSTRUCTOR APPT CHA
<b>Job key</b> : 50001664	479K IT SPEC 3
<b>Exempt</b> : N	
<b>Org. Unit</b> : 31000029	APPT PERSONNEL ACTIONS
<b>Org.key</b>	

**Administrator**

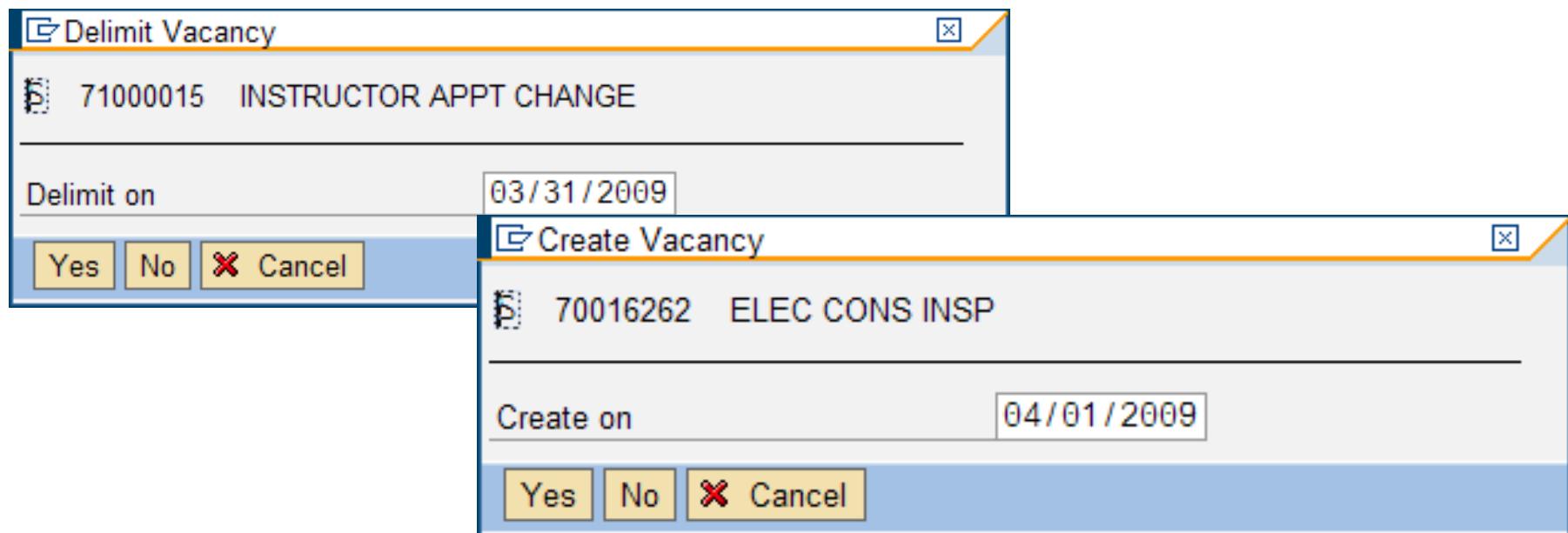
<b>PersAdmin</b>
<b>Time</b>
<b>PayrAdmin</b>

# ***Delimit / Create Vacancy***

A feature used to report vacant positions. Information will be updated on the Position Vacancy infotype located in Organizational Management.

- This popup window will appear if the position is vacant or if multi-filled.
- Click ‘Yes’ to delimit the vacancy.
- Click ‘No’ to not delimit the vacancy.

**Note:** If the position is multi-filled select ‘No’.



# **Contract Elements (0016)**

- The Contract Elements infotype if the employee's state status (permanent or non-permanent).

- Fields required to complete:

- **Contract type**

- Optional field:

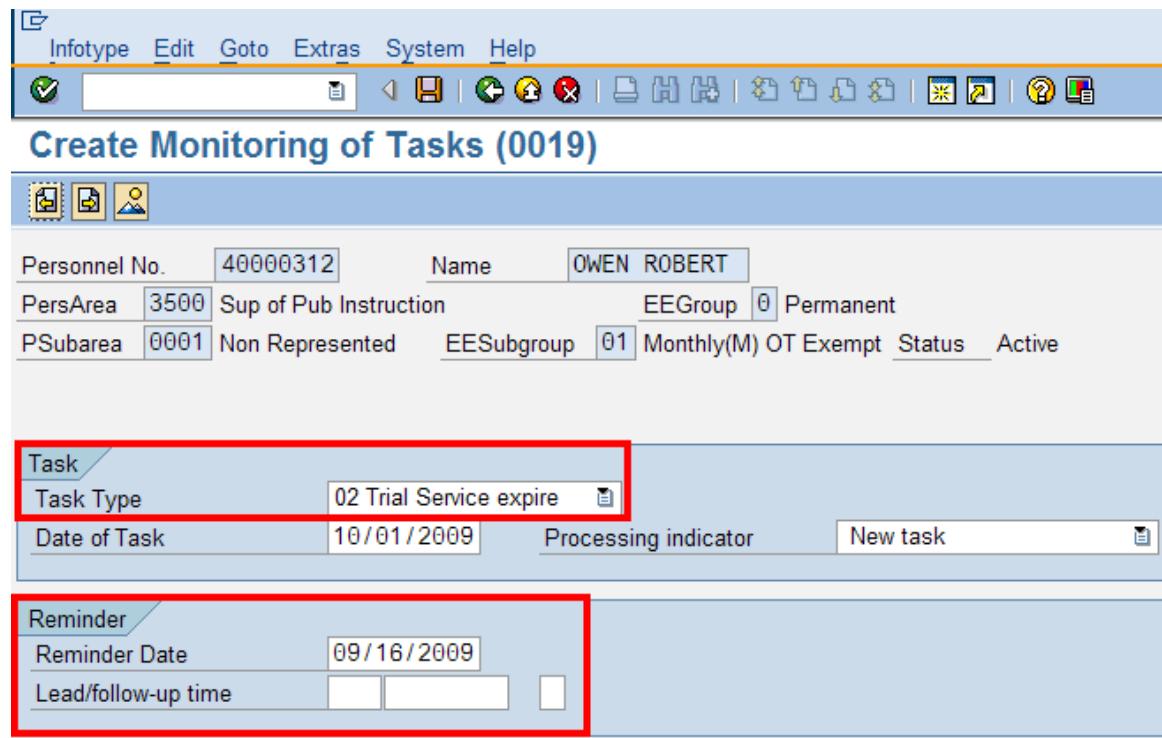
- Probationary period

- When finished, click (**Enter**) and then click (**Save**).

The screenshot shows the SAP interface for 'Copy Contract Elements (0016)'. The top menu bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main title is 'Copy Contract Elements (0016)'. The personnel number is 40000312, and the name is OWEN ROBERT. The person area is 3500 (Sup of Pub Instruction), EEGroup is 0 (Permanent), PSubarea is 0001 (Non Represented), EESubgroup is 01 (Monthly(M) OT Exempt), and Status is Active. The start date is 04/01/2009, and the end date is 12/31/9999. Two fields are highlighted with red boxes: 'Contract Type' (00 Permanent) under 'Contractual regulations' and 'Probationary Period' (6 Months) under 'Periods'.

# ***Monitoring of Task (0019)***

- The Monitoring of Tasks infotype tracks the dates on which an employee moves from non-permanent status to permanent.
- Fields to complete:
  - **Task Type**
  - **Reminder Date**
- When finished, click  (**Enter**) and then click  (**Save**).



The screenshot shows the SAP Fiori interface for creating a Monitoring of Tasks (0019) infotype. At the top, there's a toolbar with icons for Infotype, Edit, Goto, Extras, System, and Help. Below the toolbar, the title "Create Monitoring of Tasks (0019)" is displayed. The main area contains personnel details and task/reminder fields.

**Personnel Details:**

- Personnel No.: 40000312
- Name: OWEN ROBERT
- PersArea: 3500 Sup of Pub Instruction
- EEGroup: 0 Permanent
- PSubarea: 0001 Non Represented
- EESubgroup: 01 Monthly(M) OT Exempt
- Status: Active

**Task Fields (highlighted with a red box):**

- Task Type: 02 Trial Service expire
- Date of Task: 10/01/2009
- Processing indicator: New task

**Reminder Fields (highlighted with a red box):**

- Reminder Date: 09/16/2009
- Lead/follow-up time: (empty fields)

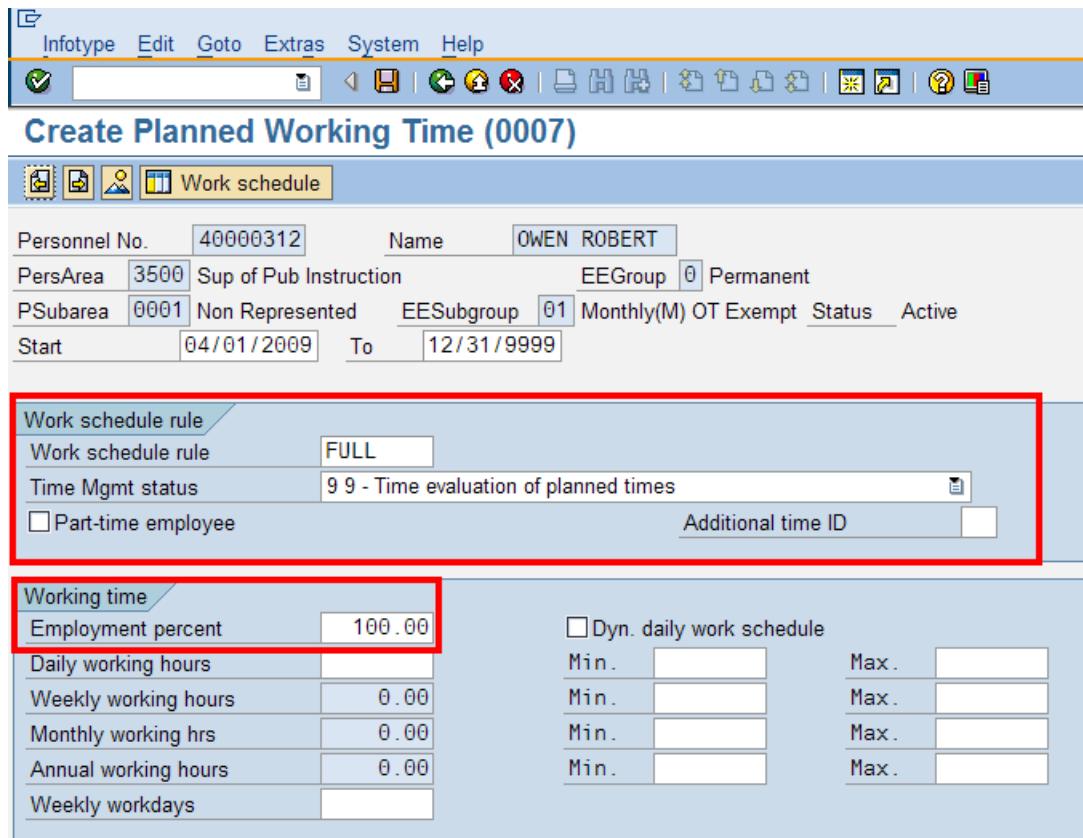
# **Planned Working Time Infotype (0007)**

- The Planned Working Time infotype stores the employee's work schedule.

- Fields to complete:

- **Work schedule rule**
  - Full 5-8s – M-F (Default)
- **Time Mgmt status**
  - 9 9 Time evaluation of planned times (Default)
- **Additional time ID**
- **Employment percent**
  - 100 (Default)

- When finished, click  (**Enter**) and then click  (**Save**).



SAP Create Planned Working Time (0007) interface showing personnel details and configuration fields. The 'Work schedule rule' and 'Employment percent' fields are highlighted.

Personnel No.: 40000312 Name: OWEN ROBERT  
PersArea: 3500 Sup of Pub Instruction EEGroup: 0 Permanent  
PSubarea: 0001 Non Represented EESubgroup: 01 Monthly(M) OT Exempt Status: Active  
Start: 04/01/2009 To: 12/31/9999

**Work schedule rule**  
Work schedule rule: FULL  
Time Mgmt status: 9 9 - Time evaluation of planned times  
 Part-time employee Additional time ID

**Working time**  
Employment percent: 100.00  
Daily working hours: 0.00 Min. 0.00 Max. 0.00  
Weekly working hours: 0.00 Min. 0.00 Max. 0.00  
Monthly working hrs: 0.00 Min. 0.00 Max. 0.00  
Annual working hours: 0.00 Min. 0.00 Max. 0.00  
Weekly workdays: Min. 0.00 Max. 0.00

# Date Specifications Infotype (0041)

- The Date Specifications infotype documents important dates in employment history.
- All previous dates will default and may need adjustments:

- Anniversary Date
- Appointment Date
- Original Hire Date
- Seniority Date
- Unbroken Srvc. Date
- Prsnl Holiday Eligibility

Date type	Date	Date type	Date
01 Anniversary Date	04/20/1995	02 Appointment Date	04/01/2009
03 Original Hire Date	04/01/2009	04 Prior PID	05/01/1999
05 Seniority Date	04/16/1997	07 Unbroken Srvc. Date	04/16/1997
18 Prsnl HolidayElgbty	06/16/2006		

- When finished, click (**Enter**) and then click (**Save**).

# **Basic Pay (IT0008)**

- The Basic Pay infotype records pay scale and salary information for an employee.

- Fields to complete:

- Reason
- Next Increase (Optional)
- PS Level
- Capacity utility level  
(Defaults in)

- When finished, click (Enter) and then click (Save).

# Personnel Administration / Payroll Handoff

- After all necessary personnel updates are made to the employee's information, the employee information is transferred to the Payroll Processor.
- Once the pay and benefits information is entered into HRMS, the employee has been rehired and is eligible for pay.

After saving *Basic Pay (0008)*, click  (**Exit**) to exit the action.



# Appointment Change resources



- See OLQR User Procedures:

- [Appointment Change Action – Transfer](#)
- [Appointment Change Action After In-Training Appointment](#)
- [Appointment Change to Change Employee Sub-Group](#)

# What else do I need to know?

- When an “permanent employee” has accepted a non-permanent position, use the following structure when processing the Appointment Change (**PA40**):
  - *Actions* (0000)
    - Reason for Action – 59 Non-Perm Limited
    - EE Group – Permanent or Non-Permanent (depending on the position)
  - *Organizational Assignment* (0001)
    - Contract – Non-Permanent
  - *Contract Type* (0016)
    - Contract Type – Permanent (Should not be changed)

# **HRMS**

# **Activity**



**Process an Appointment Change**

# Review Questions

- Why is the Appointment Change action similar to the Rehire action?

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- True or False. When hiring an employee from another agency, the losing agency must separate the employee first.

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# **Leave of Absences / Return from Leave**

# **Leave of Absence / Return from Leave Overview**

Upon completion of this section you will be able to:

- Describe the key terms and concepts associated with the Leave of Absence action.
- Explain the overall business process flow associated with a Leave of Absence.
- Describe the differences between a Paid Leave and an Unpaid Leave of Absence.
- Complete a Leave of Absence (paid and unpaid) and a Return from Leave of Absence action.

# **Key Terms**

## **Absence**

---

A time period during an employee's planned working time in which the employee does not work, including certain types of leave.

---

## **Absence Quota**

The total amount of time (in hours or days) employees are allowed to use as absences. There are different Quota types for different Absence types. (i.e.. Sick leave quota, Annual leave quota)

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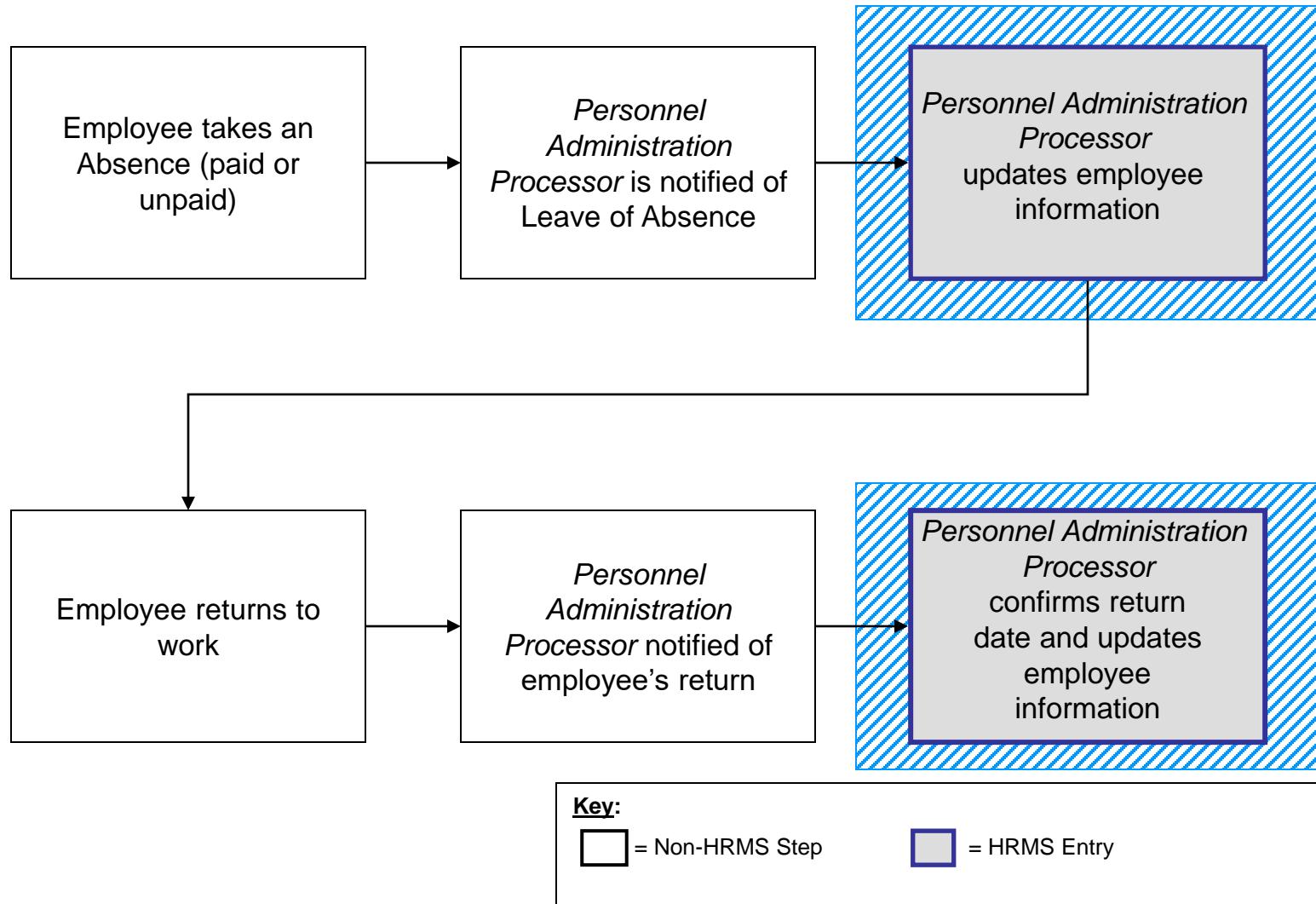
# Leave of Absence

- Extended Leave of Absences may include:
  - Educational Leave
  - Military Leave
  - L&I
- An ***absence*** is a time period during an employee's planned working time in which the employee does not work, including certain types of leave.
  - Absences are entered into the Cross Application Time Sheet (or agency specific system) where it is transferred into HRMS and accessed to process payroll.

# **Leave of Absence – cont'd**

- Employees are given \_\_\_\_\_ that are determined by their position, years of service and other factors. The absence quota varies by agency, as well as the collective bargaining unit the employee is in.
- An employee's level of seniority is dependent on the amount worked at the State of Washington, as well as the positions that have been held.

# Leave of Absence Process Flow



# Leave of Absence – Key Points

- Use the *Monitoring of Tasks* infotype to set reminder dates for a return from leave.
- You can enter the Leave of Absence action as soon as it is known that a leave will occur. (Effective Dating)
- If the employee has accrued enough leave to cover the time period, they may receive pay and are placed on a Paid Leave of Absence. If not, they are placed on an Unpaid Leave of Absence.

# Leave of Absence

- The Leave of Absence action is divided into two main types of leave:

- 
- 



# Unpaid Leave of Absence

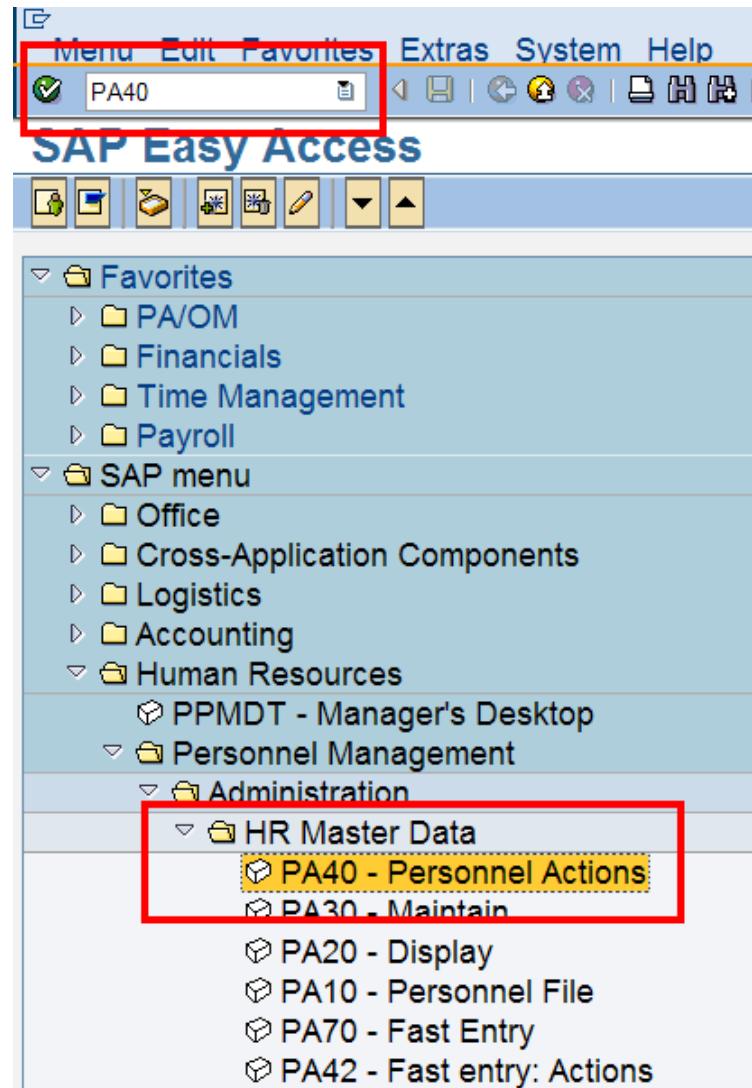
- An Unpaid Leave of Absence action is processed in HRMS when an employee takes leave for a significant period of time (exceeds 15 consecutive calendar days or more) and is not paid during that time.
  - For example, an employee takes three weeks leave to care for a sick family member for which they have no paid leave available.
- Many types of leave (maternity, sick) may be covered for a certain period of time and continue unpaid if more time is needed.
- To process an unpaid Leave of Absence, follow agency business process:
  - When an employee is on an Unpaid Leave of Absence their system status becomes 'inactive'. The Time & Attendance Processor will not be able to enter leave in CATS.
  - An Unpaid Leave of Absence should not be used if the employee is submitting 8 hours of leave a month to maintain their insurance benefits.

# Unpaid Leave of Absence Infotypes

- Update the following infotypes during the Unpaid Leave of Absence action including:
  - *Actions* (0000)
  - *Organizational Assignment* (0001)
  - *Monitoring of Tasks* (0019)

# Unpaid Leave of Absence Personnel Action

- To create an Unpaid Leave of Absence Action using the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
  - Or enter transaction code **PA40** in the **Command** field
- Using the action will ensure that all required infotype records are created.



# Unpaid Leave of Absence

- A Personnel Number is required to process an Unpaid Leave of Absence Action.

- Fields to complete:

- From

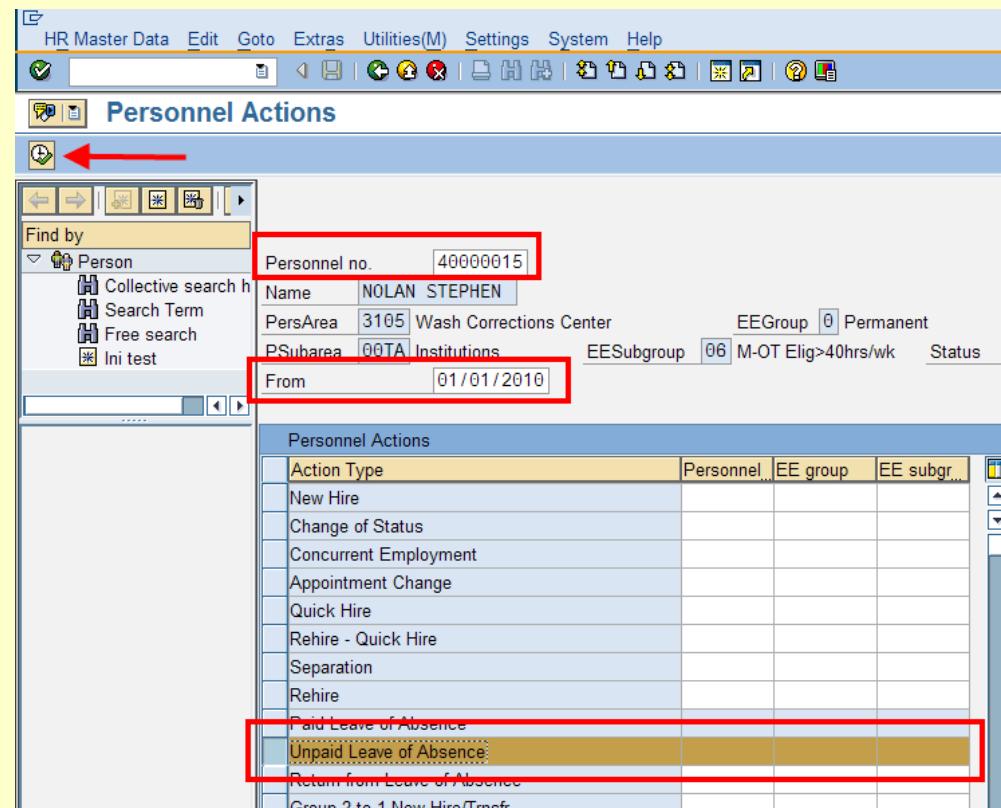
\_\_\_\_\_

\_\_\_\_\_

- Personnel no.

- To access the Unpaid Leave of Absence action, click the box to the left of Unpaid Leave of Absence.

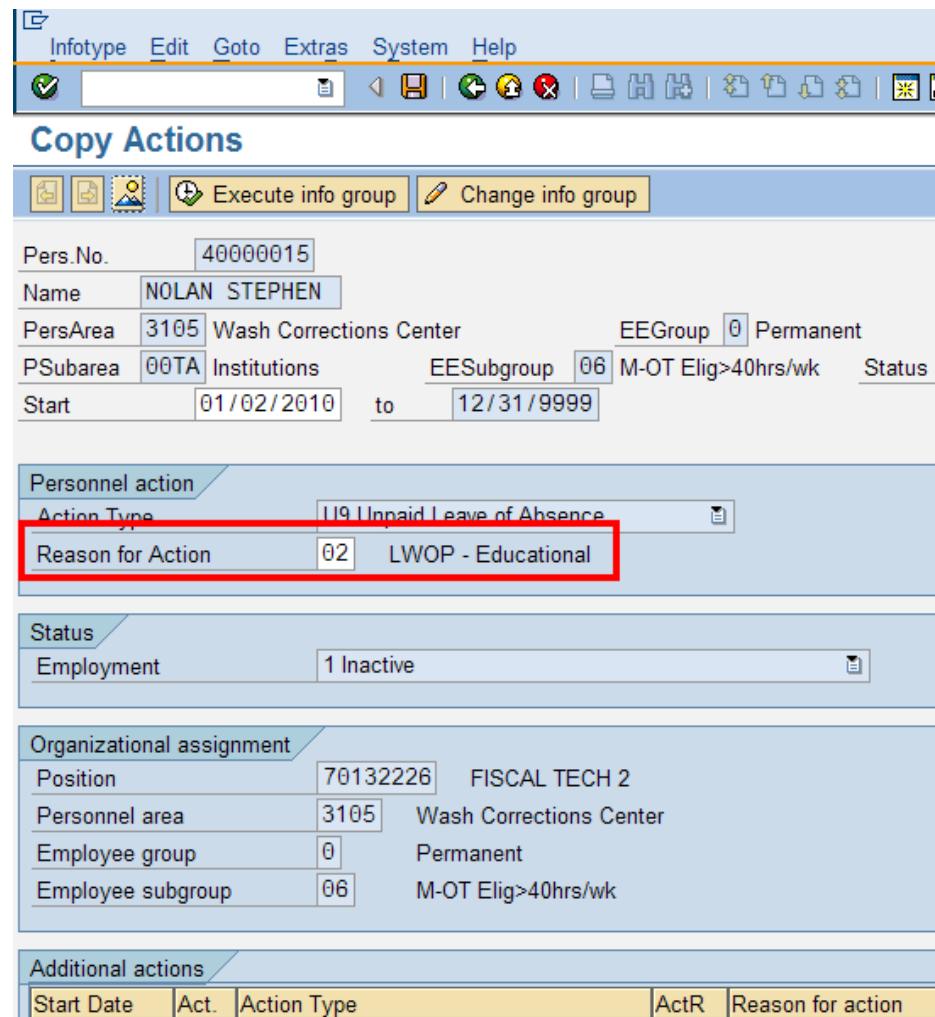
- Then click  (Execute).



# **Actions (000)**

- The Actions infotype records the Unpaid Leave of Absence in HRMS, as well as provide a reason for the leave.
- Fields to complete:
  - **Reason for Action** (use matchcode)
- When finished, click  (**Enter**) and then click  (**Save**).

**Note:** The system has added a day to the Start date. The start day becomes the first day the employee starts leave. The Employment status now reads 'Inactive' as well.



Copy Actions

Pers.No. 40000015  
Name NOLAN STEPHEN  
PersArea 3105 Wash Corrections Center  
PSubarea 00TA Institutions  
Start 01/02/2010 to 12/31/9999  
EEGroup 0 Permanent  
EESubgroup 06 M-OT Elig>40hrs/wk  
Status 1 Inactive

Personnel action

Action Type U99 Unpaid Leave of Absence  
Reason for Action 02 LWOP - Educational

Status

Employment 1 Inactive

Organizational assignment

Position 70132226 FISCAL TECH 2  
Personnel area 3105 Wash Corrections Center  
Employee group 0 Permanent  
Employee subgroup 06 M-OT Elig>40hrs/wk

Additional actions

Start Date Act. Action Type ActR Reason for action

# **Organizational Assignment (0001)**

- The Organizational Assignment infotype records the assignment of an employee in the Organizational Structure.
- Verify the information is correct.
- When finished, click (Enter) and then click (Save).
  - If no changes to the infotype, continue to save.

Infotype Edit Goto Extras System Help

Copy Organizational Assignment

Org Structure

Personnel No.	40000015	Name	NOLAN STEPHEN
PersArea	3105	Wash Corrections Center	EEGroup 0 Permanent
PSubarea	00TA	Institutions	EESubgroup 06 M-OT Elig>40hrs/wk
Start	01/02/2010	to	12/31/9999 Status Inactive

Enterprise structure

CoCode	WA01	STATE OF WASHINGTON
Pers.area	3105	Wash Corrections Center
Cost Ctr	3100000000	DEFAULT AGENCY 31 Bus. Area 3100 Department of Corrections Fund

Personnel structure

EE group	0	Permanent
EE subgroup	06	M-OT Elig>40hrs/wk
Payr.area	11	Semi-monthly
Contract	02 Probation	

Organizational plan

Percentage	100.00	Assignment
Position	70132226	B383
Job key	50000523	FISCAL TECH 2
Exempt	N	148M
Org. Unit	30005153	FISCAL TECHNICIAN 2
Org.key	2206	WASH CORRECTIONS C

Administrator

PersAdmin	003	ACCOUNTING
Time	003	ACCOUNTING
PayrAdmin	003	ACCOUNTING

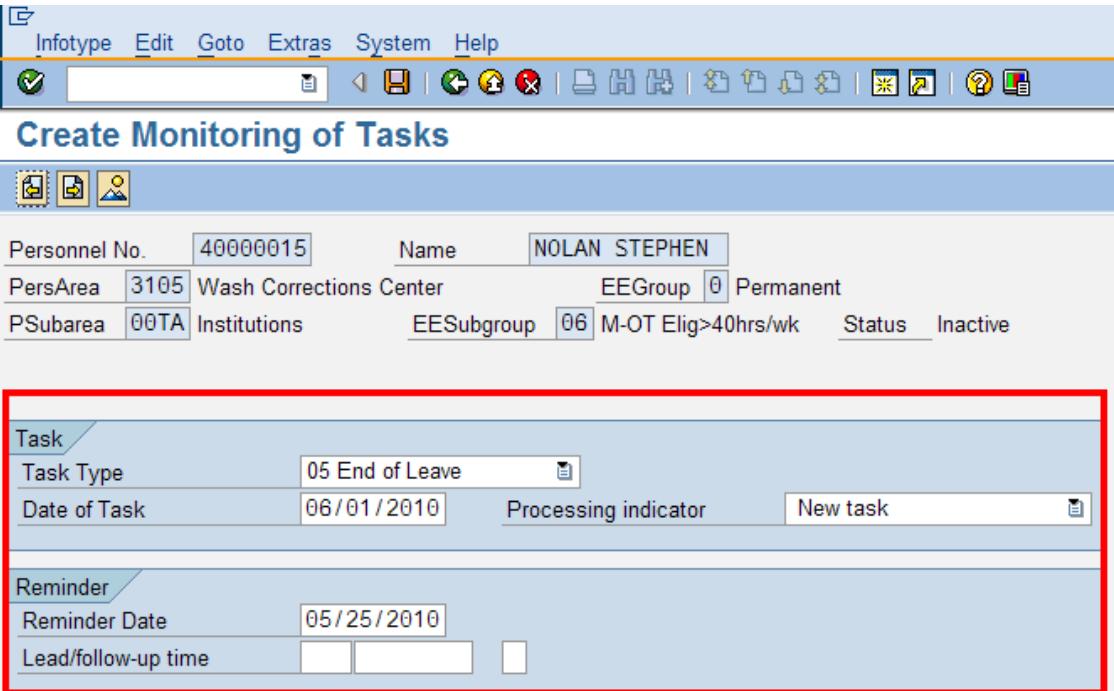
# ***Monitoring of Tasks (0019)***

- The Monitoring of Tasks infotype tracks the date which the employee is scheduled to return from leave.

- Fields to complete:

- **Task Type**
- **Date of Task**
- **Processing Indicator**
- **Reminder Date**

- When finished, click  (**Enter**) and then click  (**Save**).



The screenshot shows the SAP Fiori interface for creating a monitoring task. At the top, there's a toolbar with various icons. Below it, the title "Create Monitoring of Tasks" is displayed. The main area contains personnel information and a task configuration section. A red box highlights the task configuration section.

Personnel No.	40000015	Name	NOLAN STEPHEN
PersArea	3105 Wash Corrections Center	EEGroup	0 Permanent
PSubarea	00TA Institutions	EESubgroup	06 M-OT Elig>40hrs/wk
		Status	Inactive

Task	
Task Type	05 End of Leave
Date of Task	06/01/2010
Processing indicator	New task

Reminder	
Reminder Date	05/25/2010
Lead/follow-up time	[empty]

# Personnel Administration / Payroll

- There is no handoff to the Payroll Processor, but they should be notified that the employee has been placed on Leave of Absence.



# Paid Leave of Absence

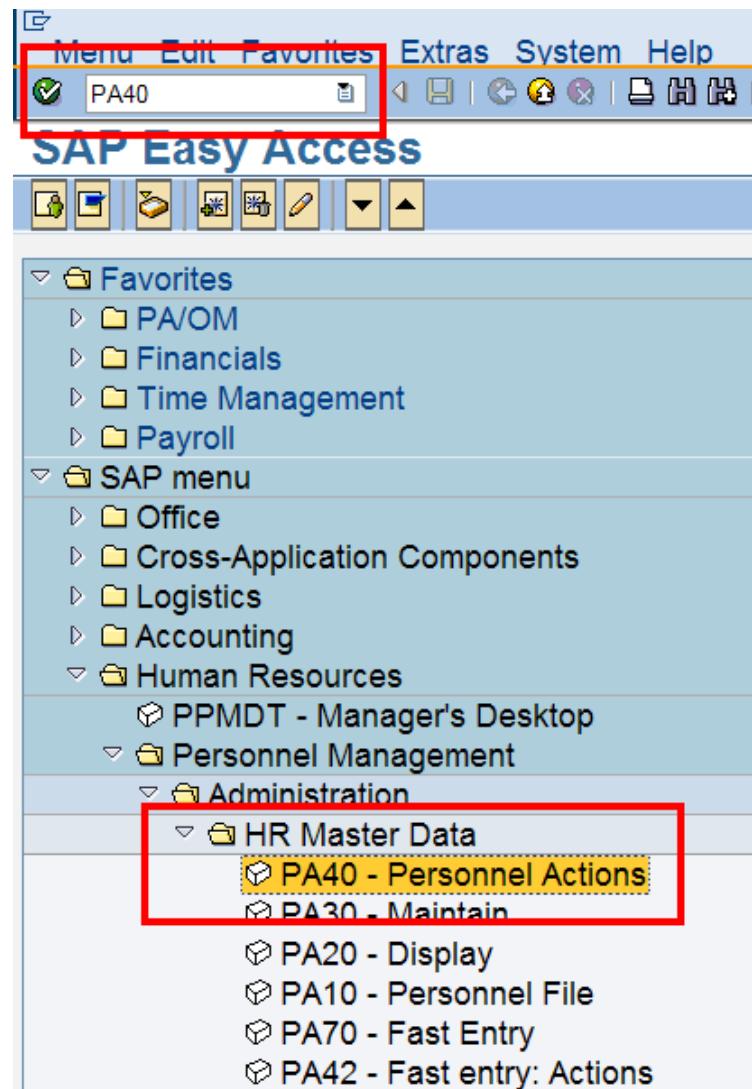
- A Paid Leave of Absence action is processed in HRMS when an employee takes a leave for a significant period of time (exceeds 15 consecutive calendar days or more) and is paid (or unpaid) during that employment time.
  - The employee should be placed on Paid Leave of Absence if they are on leave without pay, but are using 8 hours of leave a month to maintain their insurance benefits.
    - The employee's status would remain 'active' while on Paid Leave of Absence.
- A paid Leave of Absence can be granted for a number of reasons:
  - Sick Leave / Annual Leave
  - Military Leave with Pay
  - Family Medical Leave Act

# Paid Leave of Absence Infotypes

- Update the following infotypes during the Paid Leave of Absence action including:
  - *Actions (0000)*
  - *Organizational Assignment (0001)*
  - *Monitoring of Tasks (0019)*

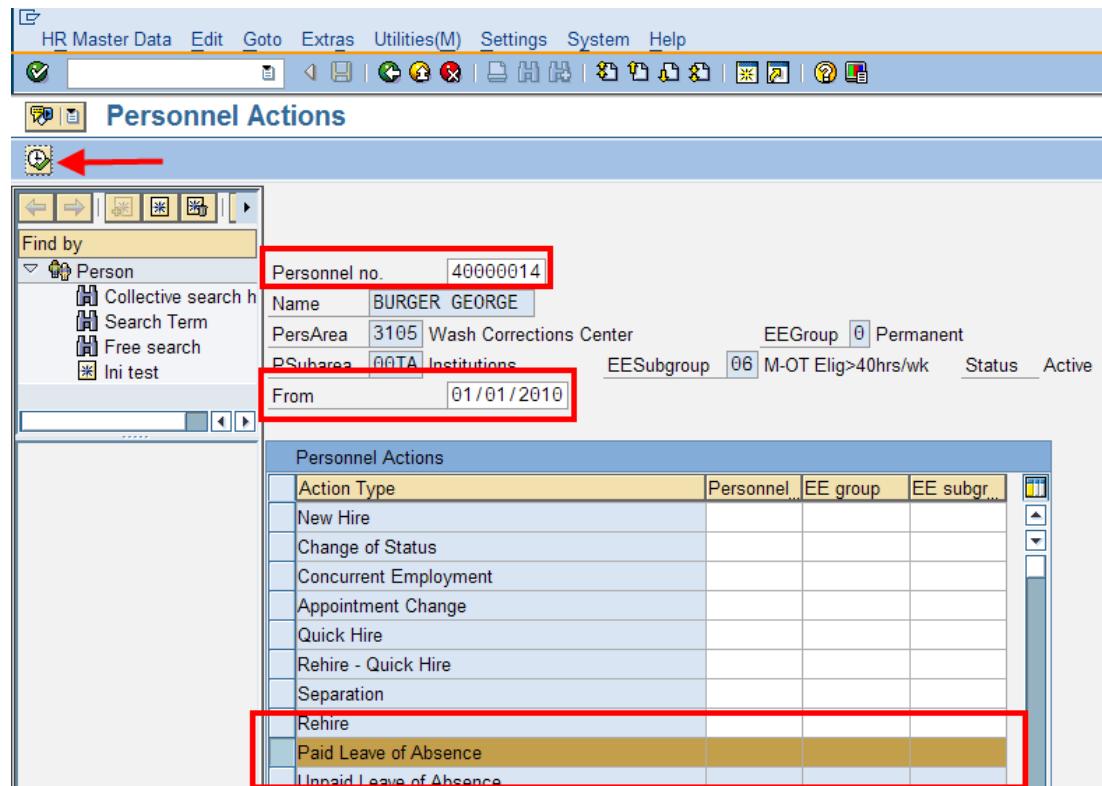
# Paid Leave of Absence Personnel Action

- To create an Paid Leave of Absence Action using the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
  - Or enter transaction code **PA40** in the **Command** field
- Using the action will ensure that all required infotype records are created.



# Paid Leave of Absence

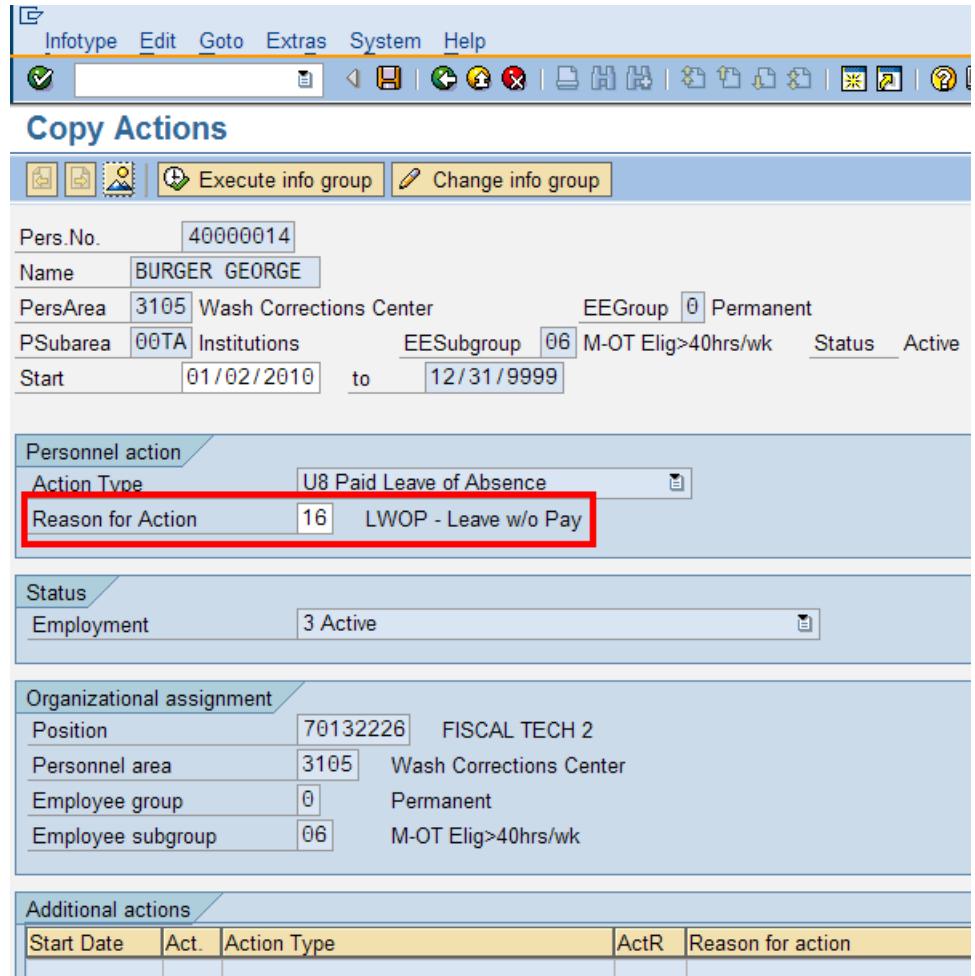
- A Personnel Number is required to process a Paid Leave of Absence action.
- Fields to complete:
  - **From** (*Last working day of the employee*)
  - **Personnel no.**
- To access the Paid Leave of Absence action, click the box to the left of *Paid Leave of Absence*.
- Then click  (**Execute**).



# **Actions (0000)**

- Update the Actions infotype to record a Leave of Absence, as well as give a Reason for Action for the Leave.
- Fields to complete:
  - **Reason for Action** (use matchcode)
- When finished, click  (**Enter**) and then click  (**Save**).

**Note:** The system has added a day to the State date. The start day becomes the first day the employee starts leave.



The screenshot shows the SAP Infotype 'Actions (0000)' screen. At the top, there's a toolbar with various icons. Below it, a sub-toolbar labeled 'Copy Actions' with buttons for 'Execute info group' and 'Change info group'. The main area displays personnel information for employee 40000014, George Burger, working at Wash Corrections Center. The 'Personnel action' section is highlighted, showing the 'Action Type' as 'U8 Paid Leave of Absence' and the 'Reason for Action' as '16 LWOP - Leave w/o Pay', both of which are enclosed in a red box. The 'Status' section shows 'Employment' with '3 Active'. In the 'Organizational assignment' section, the position is listed as 70132226 (FISCAL TECH 2) and the personnel area is 3105 (Wash Corrections Center). The 'Employee group' is 0 (Permanent) and the 'Employee subgroup' is 06 (M-OT Elig>40hrs/wk). The 'Additional actions' section includes columns for Start Date, Act., Action Type, ActR, and Reason for action.

# ***Organizational Assignment (0001)***

- The Organizational Assignment infotype records the assignment of an employee in the Organizational Structure.

- Verify the information is correct.

- When finished, click **(Enter)** and then click **(Save)**.

- If no changes are made to the infotype, continue to save.

The screenshot shows the SAP Infotype 0001 - Copy Organizational Assignment screen. The top navigation bar includes Infotype, Edit, Goto, Extras, System, and Help. Below the menu is a toolbar with various icons. The main title is "Copy Organizational Assignment".

**Personnel No.** 40000014 **Name** BURGER GEORGE  
**PersArea** 3105 Wash Corrections Center **EEGroup** 0 Permanent  
**PSubarea** 00TA Institutions **EESubgroup** 06 M-OT Elig>40hrs/wk **Status** Active  
**Start** 01/02/2010 **to** 12/31/9999

**Enterprise structure**  
**CoCode** WA01 STATE OF WASHINGTON  
**Pers.area** 3105 Wash Corrections Center **Subarea** 00TA Institutions  
**Cost Ctr** 3100000000 DEFAULT AGENCY 31 Bus. Area 3100 Department of Corrections Fund

**Personnel structure**  
**EE group** 0 Permanent **Payr.area** 11 Semi-monthly  
**EE subgroup** 06 M-OT Elig>40hrs/wk **Contract** 02 Probation

**Organizational plan**  
**Percentage** 100.00 **Assignment** B383  
**Position** 70132226 FISCAL TECH 2  
**Job key** 50000523 148M  
FISCAL TECHNICIAN 2  
**Exempt** N  
**Org. Unit** 30005153 2206  
WASH CORRECTIONS C  
**Org.key** 2206

**Administrator**  
**PersAdmin** 003 ACCOUNTING  
**Time** 003 ACCOUNTING  
**PayrAdmin** 003 ACCOUNTING

# ***Monitoring of Tasks (0019)***

- The Monitoring of Tasks infotype tracks the date which the employee is scheduled to return from leave.
- Fields to complete:

- **Task Type**
- **Date of Task**
- **Processing Indicator**
- **Reminder Date**

The screenshot shows the SAP Fiori interface for creating a monitoring task. At the top, there's a toolbar with various icons. Below it, the title "Create Monitoring of Tasks" is displayed. The main area is divided into sections: "Personnel No." (40000014), "Name" (BURGER GEORGE), "PersArea" (3105 Wash Corrections Center), "EEGroup" (0 Permanent), "PSubarea" (00TA Institutions), "EESubgroup" (06 M-OT Elig>40hrs/wk), and "Status" (Active). A large red box highlights the "Task" section, which contains fields for "Task Type" (05 End of Leave), "Date of Task" (06/01/2010), "Processing indicator" (New task), and "Reminder" (Reminder Date: 05/25/2010).

- When finished, click (**Enter**) and then click (**Save**).

# Personnel Administration / Payroll

- There is no handoff to the Payroll Processor, but they should be notified that the employee has been placed on Leave of Absence.



# **HRMS**

# **Activity**



**Process Paid Leave of Absence**

# Review Questions

- Why would you use a Paid Leave of Absence Action for an employee who is out on leave without pay?

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- An Unpaid Leave of Absence is processed in HRMS when the employee takes how many consecutive days off?

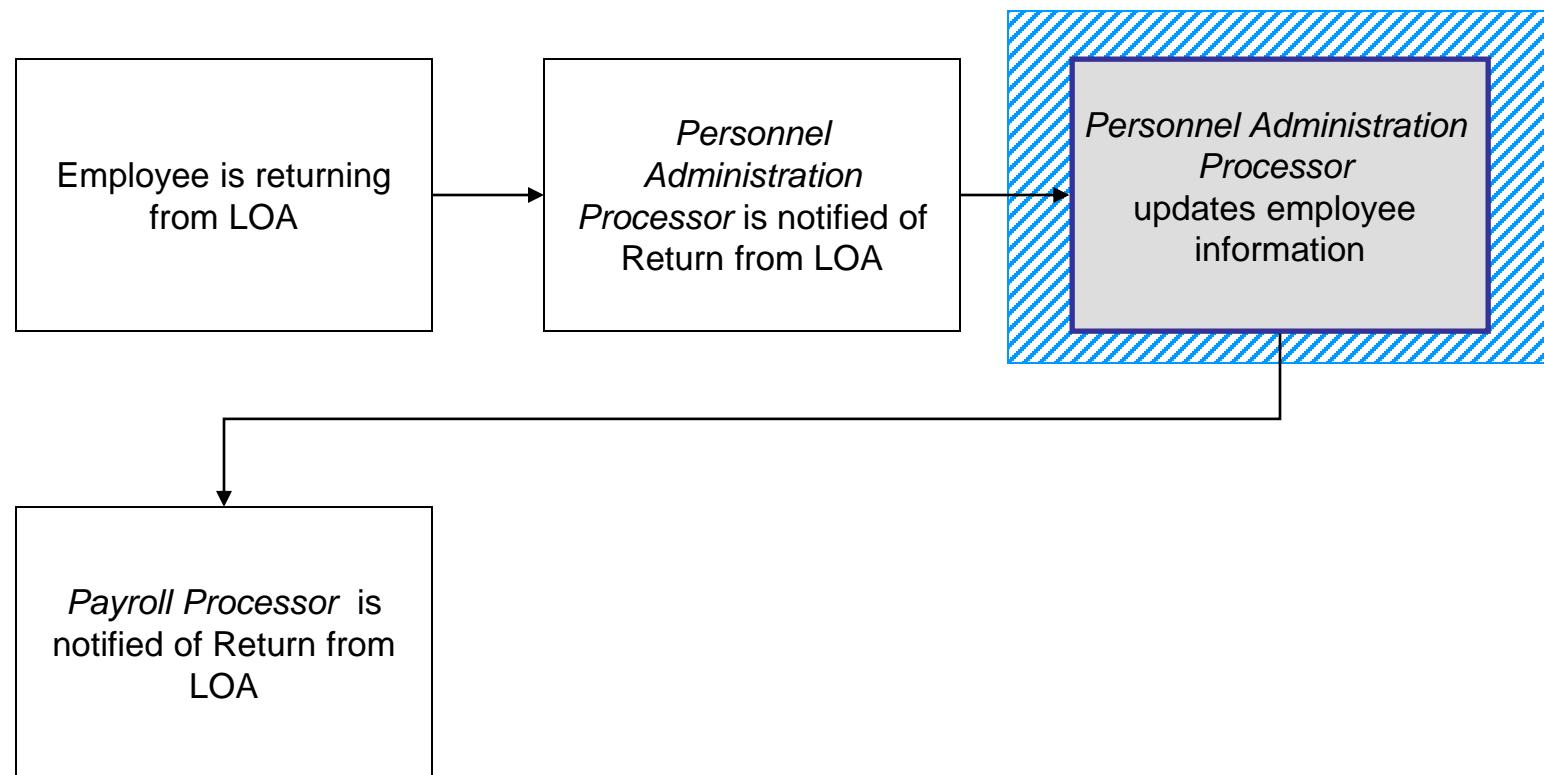
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# Return from Leave of Absence

- The Return from Leave of Absence action records an employee returning from a Leave of Absence (paid or unpaid).
- To process the Return from Leave of Absence you must receive verification from the employee's supervisor.
  - This requirement is agency specific. Please check with your agency on the needs for the process.
- Though an end date has been set up through HRMS when leave was recorded you must complete the Return from Leave of Absence action and *Monitoring of Task* (0019).



# Return from Leave of Absence Process Flow



Key:

= Non-HRMS Step

= HRMS Entry

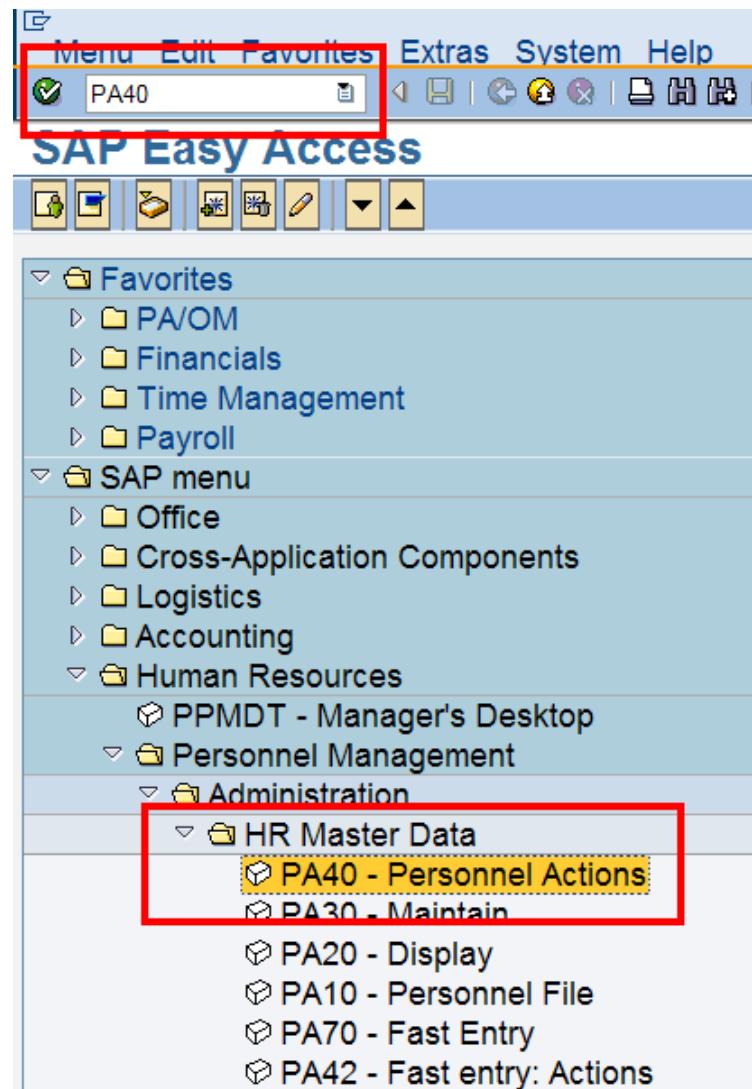
# Return from Leave of Absence Infotypes

- Update the following infotypes during the Paid Leave of Absence action including:
  - *Actions* (0000)
  - *Organizational Assignment* (0001)
  - *Date Specifications* (0041)
- Use **PA30** to maintain the following infotype:
  - *Monitoring of Task* (0019)

# Return from Leave of Absence

## Personnel Action

- To create a Return from Leave of Absence Action using the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
  - Or enter transaction code **PA40** in the **Command** field
- Using the action will ensure that all required infotype records are created.



# Return from Leave of Absence

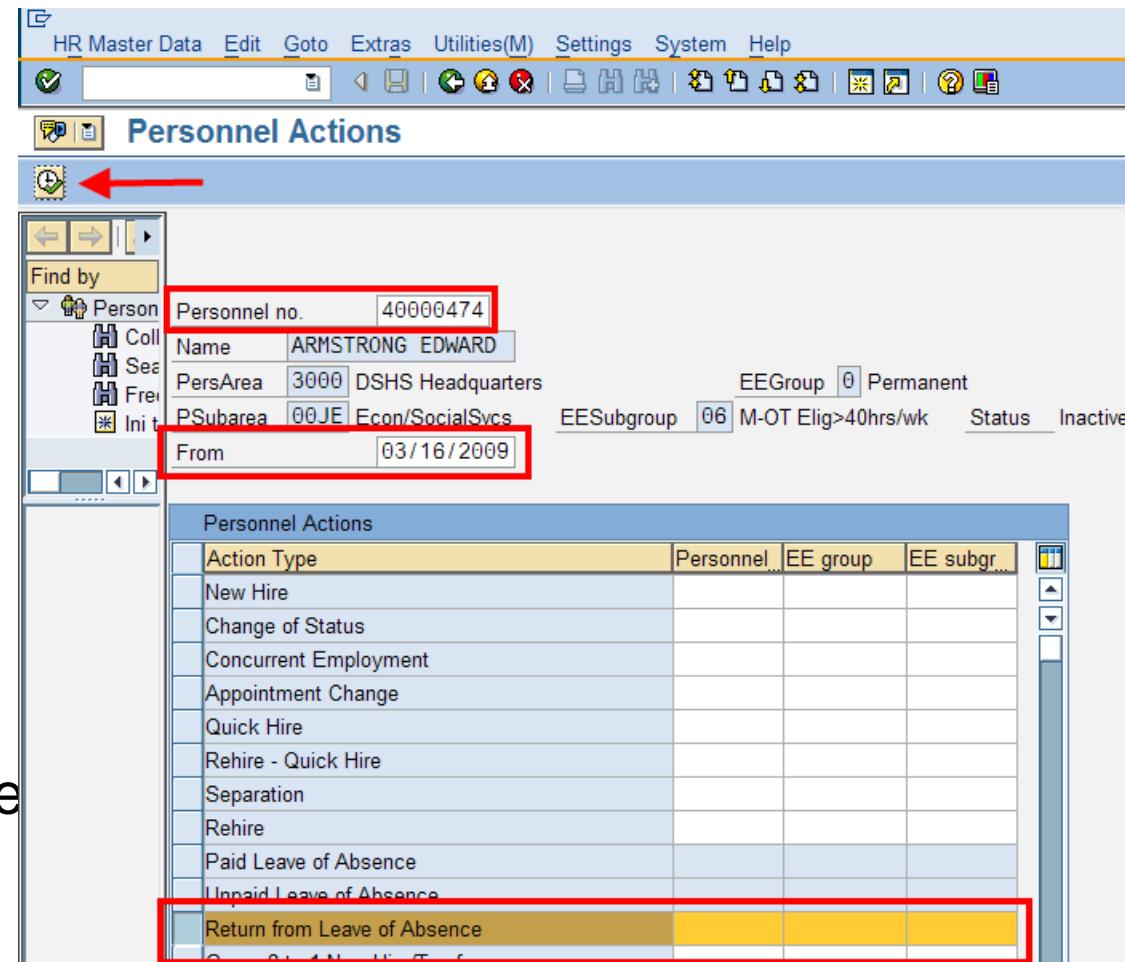
- A Personnel Number is required to access a Return from Leave of Absence Action.

- Fields to complete:

- **From** (Enter the date the employee returns from leave)
  - **Personnel no.**

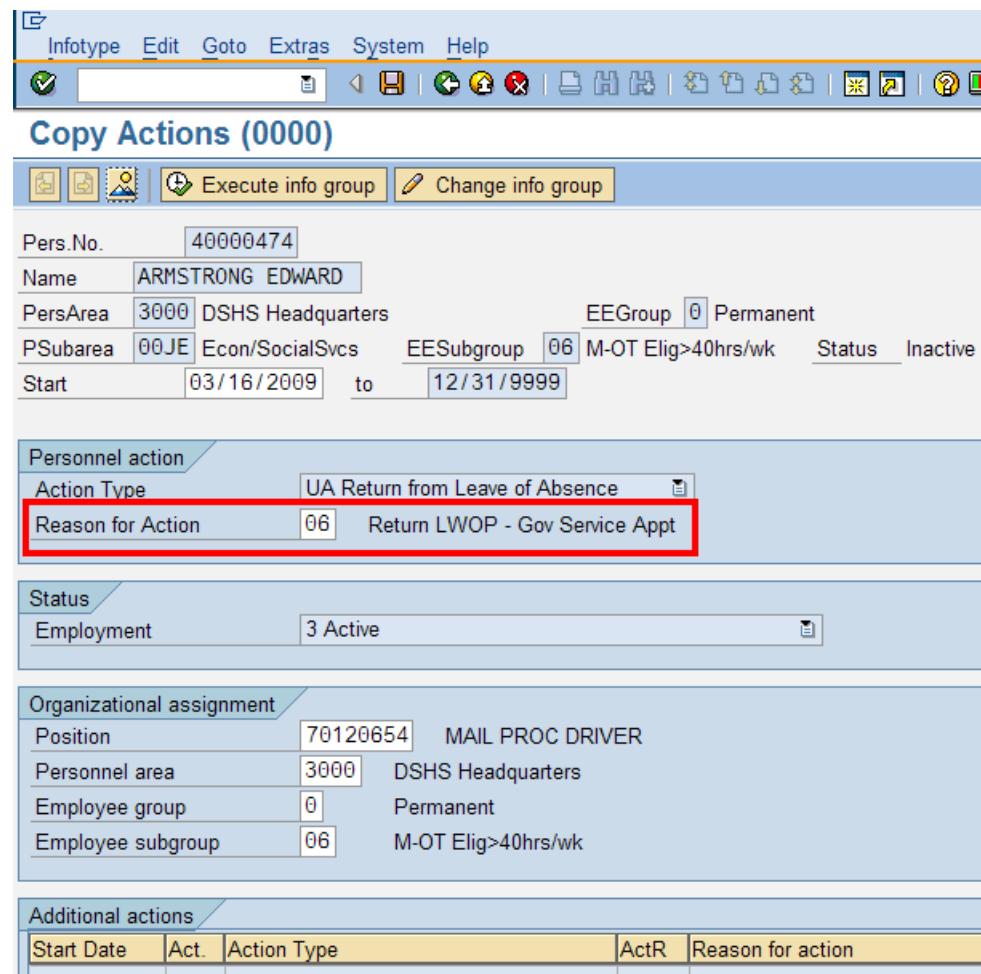
- To access the Return from Leave of Absence action, click the box to the left of Return from Leave of Absence.

- Click  **(Execute).**



# **Actions (0000)**

- The Actions infotype records the Return from Leave of Absence in HRMS as well as provide a reason for the return.
- Fields to complete:
  - **Reason for Action** (use matchcode)
- When finished, click  (**Enter**) and then click  (**Save**).



The screenshot shows the SAP HRMS Infotype Copy Actions (0000) screen. The personnel number is 40000474, name is ARMSTRONG EDWARD, and the personnel area is 3000 DSHS Headquarters. The start date is 03/16/2009 and the end date is 12/31/9999. The personnel action section shows the action type as UA Return from Leave of Absence and the reason for action as 06 Return LWOP - Gov Service Appt. The organizational assignment section shows the position as 70120654 MAIL PROC DRIVER, personnel area as 3000 DSHS Headquarters, employee group as 0 Permanent, and employee subgroup as 06 M-OT Elig>40hrs/wk. The additional actions section includes fields for Start Date, Act., Action Type, ActR, and Reason for action.

Start Date	Act.	Action Type	ActR	Reason for action

# **Organizational Assignment (0001)**

- The Organizational Assignment infotype records the assignment of an employee in the Organizational Structure.

- Verify the information is correct.

- When finished, click **(Enter)** and then click **(Save)**.

- If no changes are made to the infotype, continue to save.

The screenshot shows the SAP Infotype 'Copy Organizational Assignment (0001)' screen. The top navigation bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. The toolbar contains various icons for file operations like copy, paste, and search. The main title is 'Copy Organizational Assignment (0001)'. Below the title, there are tabs for 'Org Structure' (selected), 'Personnel', 'Enterprise structure', 'Personnel structure', 'Organizational plan', and 'Administrator'. The 'Org Structure' tab displays personnel information: Personnel No. 40000474, Name ARMSTRONG EDWARD, PersArea 3000 DSHS Headquarters, PSubarea 00JE Econ/SocialSvcs, EEGroup 0 Permanent, EESubgroup 06 M-OT Elig>40hrs/wk, Status Active, Start 03/16/2009, and to 12/31/9999. The 'Enterprise structure' tab shows CoCode WA01 STATE OF WASHINGTON, Pers.area 3000 DSHS Headquarters, Subarea 00JE Econ/SocialSvcs, Cost Ctr 300000000000 DEFAULT AGENCY 30 Bus. Area 3000 Dept of Social & Health Serv., and Fund. The 'Personnel structure' tab shows EE group 0 Permanent, Payr.area 11 Semi-monthly, EE subgroup 06 M-OT Elig>40hrs/wk, Contract Permanent, and a dropdown menu. The 'Organizational plan' tab lists Percentage 100.00, Position 70120654, Job key 50000338, Exempt N, Org. Unit 30012253, and Org.key B70. The 'Administrator' tab lists PersAdmin, Time 08M MSA/ASD/FISCAL OFFIC, and PayAdmin.

# Date Specifications (0041)

- The Date Specifications infotype is important because it records changes in important employment dates, such as seniority dates and effective dates.

Date Specifications	
Date type	Date
01 Anniversary Date	11/20/2001
03 Original Hire Date	12/21/2001
05 Seniority Date	12/21/2001
18 Prsnl HolidayElgblty	06/16/2006

Date type	Date
02 Appointment Date	07/07/2002
04 Prior PID	07/01/2003
07 Unbroken Srvc. Date	12/21/2001

- When finished, click (**Enter**) and then click (**Save**).

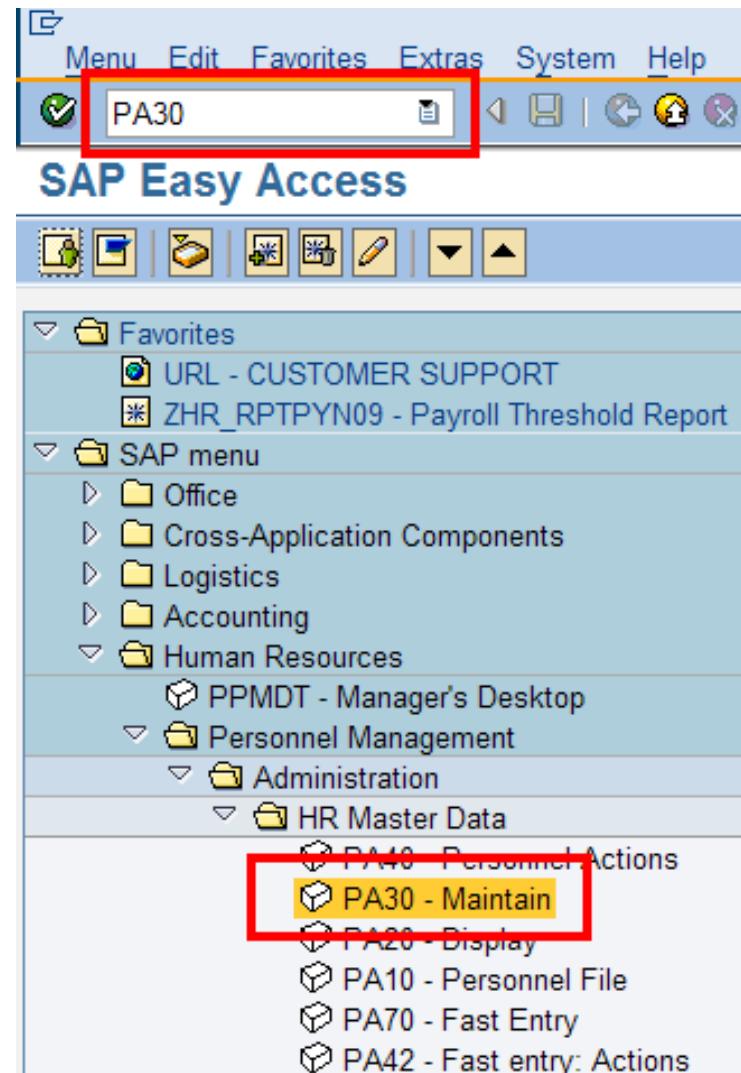
# Adjusting Service Dates – Return from Leave of Absence

- Date adjustments are not automatic in HRMS. This is a manual process.
  - See OLQR User Procedure, [Date Specifications - Maintain](#) for assistance in updating the Date Specifications infotype.
- When processing a return from Leave Without Pay (LWOP), you may need to adjust the dates depending on the reason the employee was on Leave of Absence:
  - LWOP of fifteen consecutive days or less does not affect the anniversary date.
  - LWOP greater than 15 days does not affect the anniversary dates in the following cases:
    - Military Leave
    - Government Leave
    - Assault Leave
    - Educational Leave
    - Leave in lieu of RIF
    - L&I



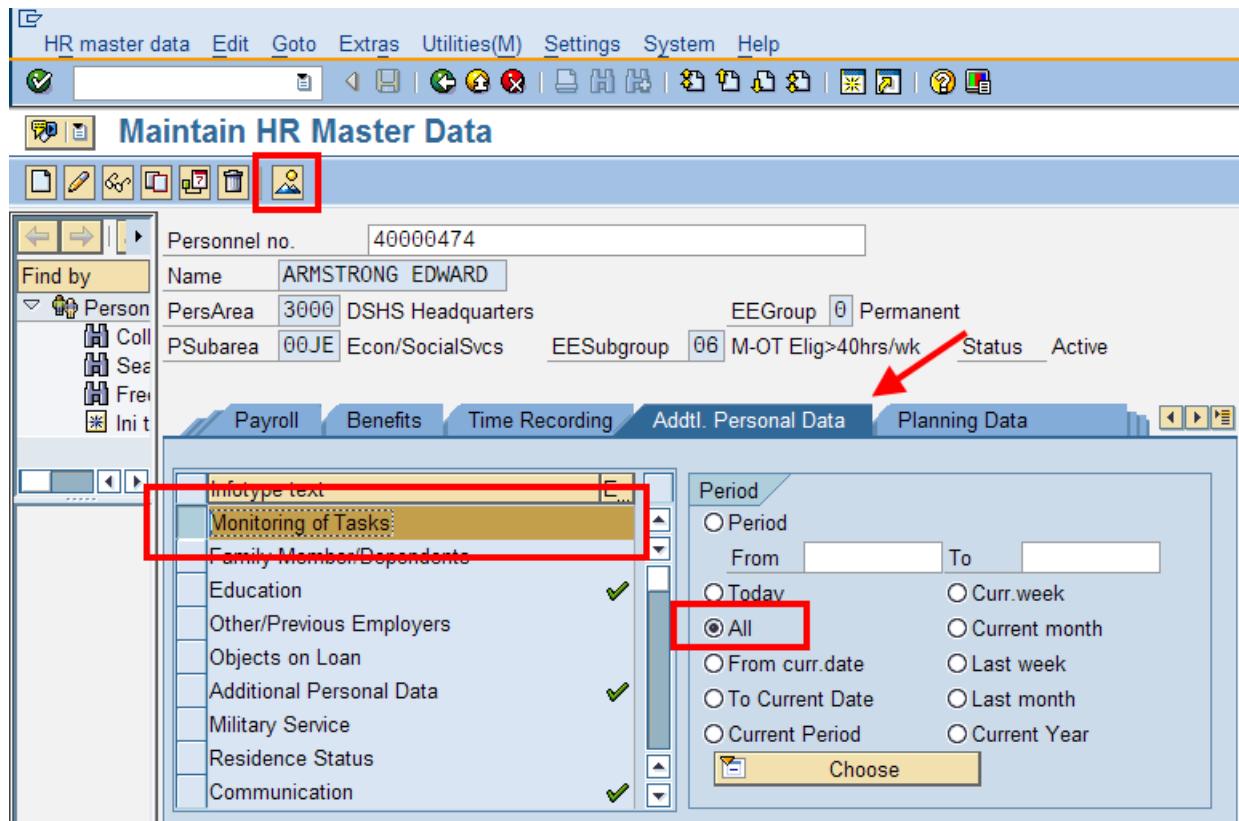
# **Monitoring of Task (0019)**

- When the employee returns from Leave of Absence, the *Monitoring of Task (0019)* must be updated.
- To maintain the Monitoring of Task infotype:
  - Follow menu path: Human Resources → Personnel Management → Administration → HR Master Data → Maintain
  - Or enter transaction code **PA30** in the **Command** field



# Maintain *Monitoring of Task* (0019)

1. Click the **Addtl. Personal Data** tab and click the box to the left of the *Monitoring of Task* (0019).
2. In the ‘Period’ section, click **(All)**.
3. To view all records created, click **(Overview)**.



# Monitoring of Task (0019)

4. Select the appropriate record

- Task Type
  - End of Leave

5. Click  (Copy)

Screenshot of the SAP Infotype screen titled "List Monitoring of Tasks (0019)".

Personnel No.: 40000474 Name: ARMSTRONG EDWARD  
PersArea: 3000 DSHS Headquarters EEGroup: 0 Permanent  
PSubarea: 00JE Econ/SocialSvcs EESubgroup: 06 M-OT Elig>40hrs/wk Status: Active  
Choose: 01/01/1800 to 12/31/9999 STy: [ ]

Task On	Task Type	Task Type Text	Processing indicator	Reminder
03/01/2009	05	End of Leave	New task	02/16/2009

6. Fields to complete:

- Date of Task
- Processing indicator
  - Task Completed

7. When finished, click  (Enter) and then click  (Save)

Screenshot of the SAP Infotype screen titled "Copy Monitoring of Tasks (0019)".

Personnel No.: 40000474 Name: ARMSTRONG EDWARD  
PersArea: 3000 DSHS Headquarters EEGroup: 0 Permanent  
PSubarea: 00JE Econ/SocialSvcs EESubgroup: 06 M-OT Elig>40hrs/wk Status: Active

Task
Task Type: 05 End of Leave
Date of Task: 03/01/2009
Processing indicator: 2 Task completed

Reminder:  
Reminder Date: 02/16/2009  
Lead/follow-up time: [ ] [ ]

# **HRMS**

# **Activity**



## **Process Return from Leave of Absence**

# Review Questions

- From the Personnel Actions screen, what date would be entered in the From field when placing someone on Paid/Unpaid leave of absence?

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- What infotype is not included in the dynamic action Return from Leave of Absence?

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# **Separation**

# Separation Overview

Upon completion of this section you will be able to:

- Define the key terms and concepts associated with the Employee Separation action.
- Explain the overall business process flow associated with the Separation action.
- Navigate through the Separation infotypes and understand the importance of the information in each infotype.
- Complete an Employee Separation action.

# **Key Term**

## **Separation**

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It is a separation of employment with the State of Washington.

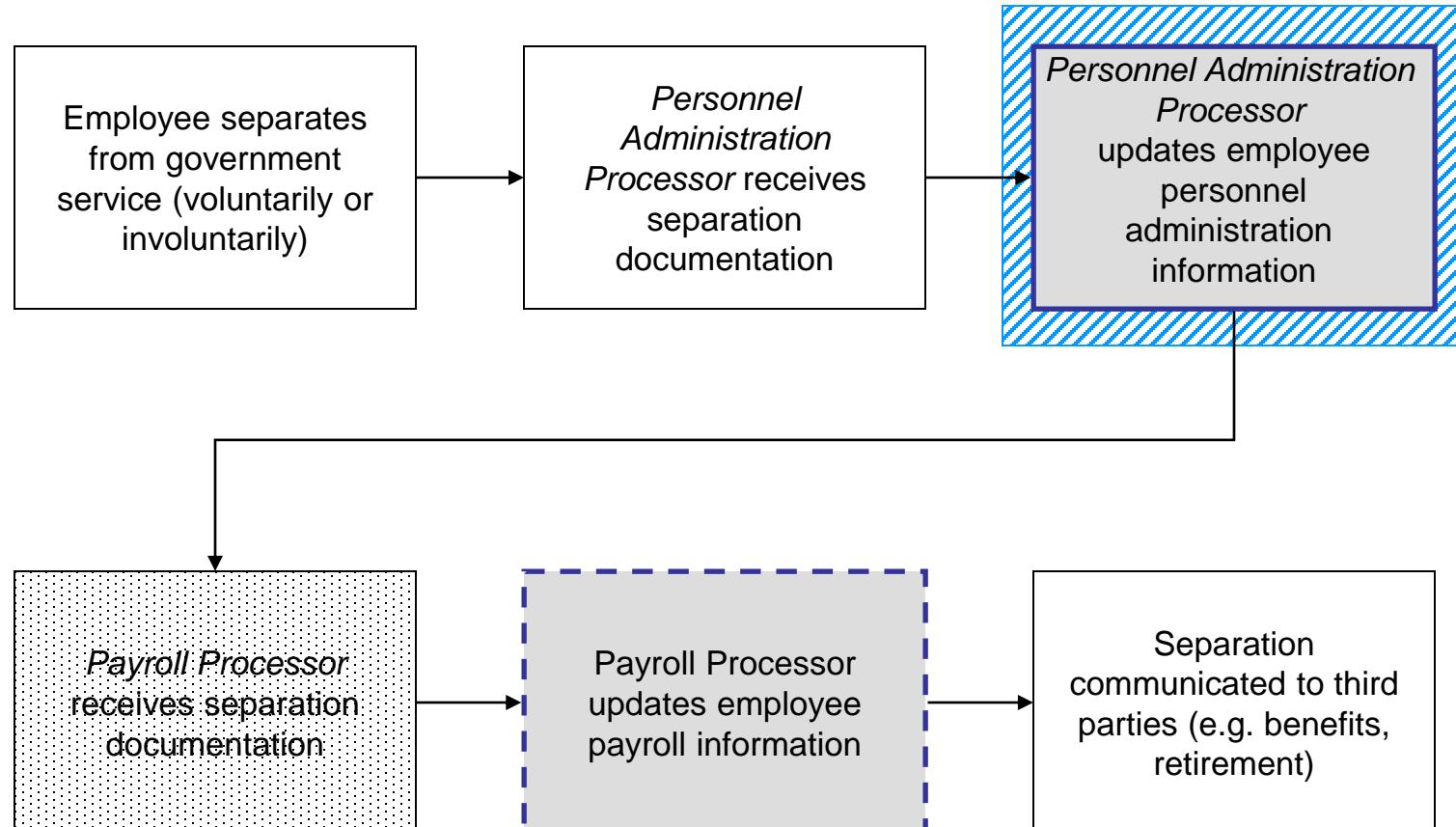
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# Separation

- A \_\_\_\_\_ occurs when an employee discontinues his/her employment with the state of Washington.
  - Can be either voluntary or involuntary
- There are three main types of separations:
  - **Retirement** - A voluntary separation from employment with the state of Washington based on years of service and eligibility.
  - **Resignation** - A voluntary separation from employment with the state of Washington.
  - **Termination** - An involuntary separation from employment with the state of Washington.

# Employee Separation Process Flow



Key:

[White Box] = Non-HRMS Step

[Dotted Box] = Handoff Administration

[Blue Box] = HRMS Entry

[Dashed Box] = No Personnel involvement

# Separation

- When an employee separates from state service his/her information is stored within HRMS using the assigned personnel number.
- Reports outlining separations are sent via an interface to Health Care Authority, Department of Retirement Systems and Unions as the separation occurs.
- Prior to starting the separation action, contact the Time and Attendance Processor to delete any future CAT entries after the separation date.
  -  – You will not be able to continue the action with these entries in CATS.
- The employee's system status will be 'withdrawn'.

# Processing a Separation

- To process an employee separation, you require either:

- A letter from the employee indicating reason for separation and the effective date.
- A letter from the appropriate appointing authority indicating reason for separation and effective date.

**Note:** Your agency may have other requirements. Please follow any agency specific guidelines.

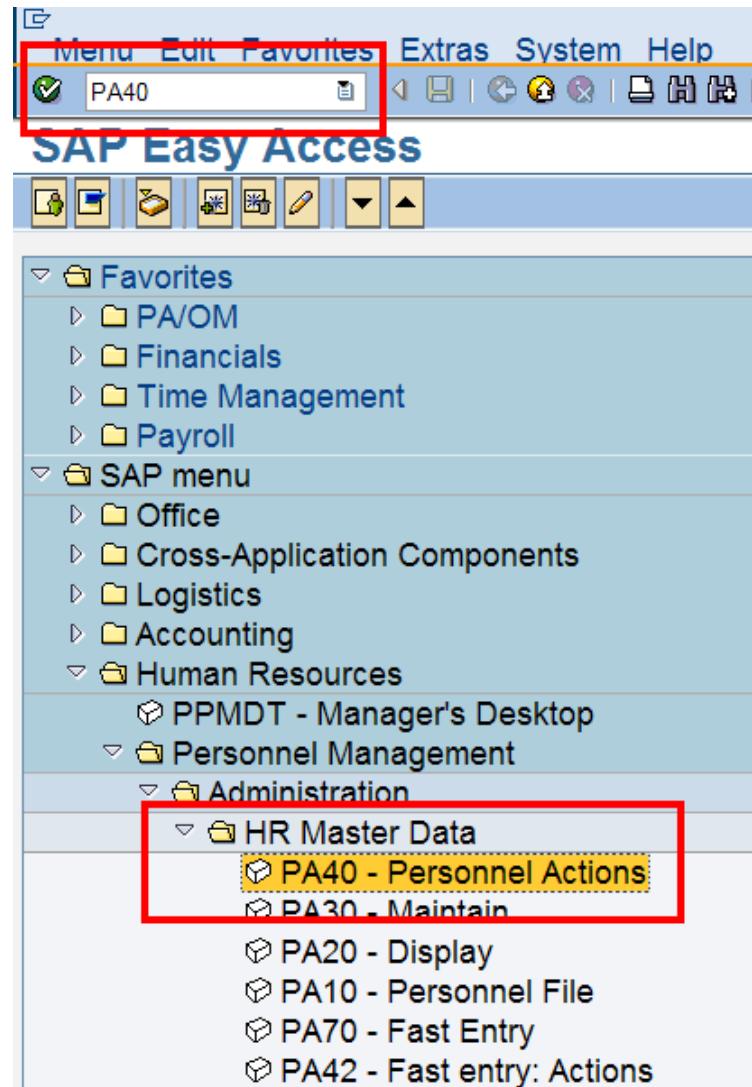


# Separation Action Infotypes

- Update the following infotypes during the Separation action including:
  - *Actions* (0000)
    - Create Vacancy

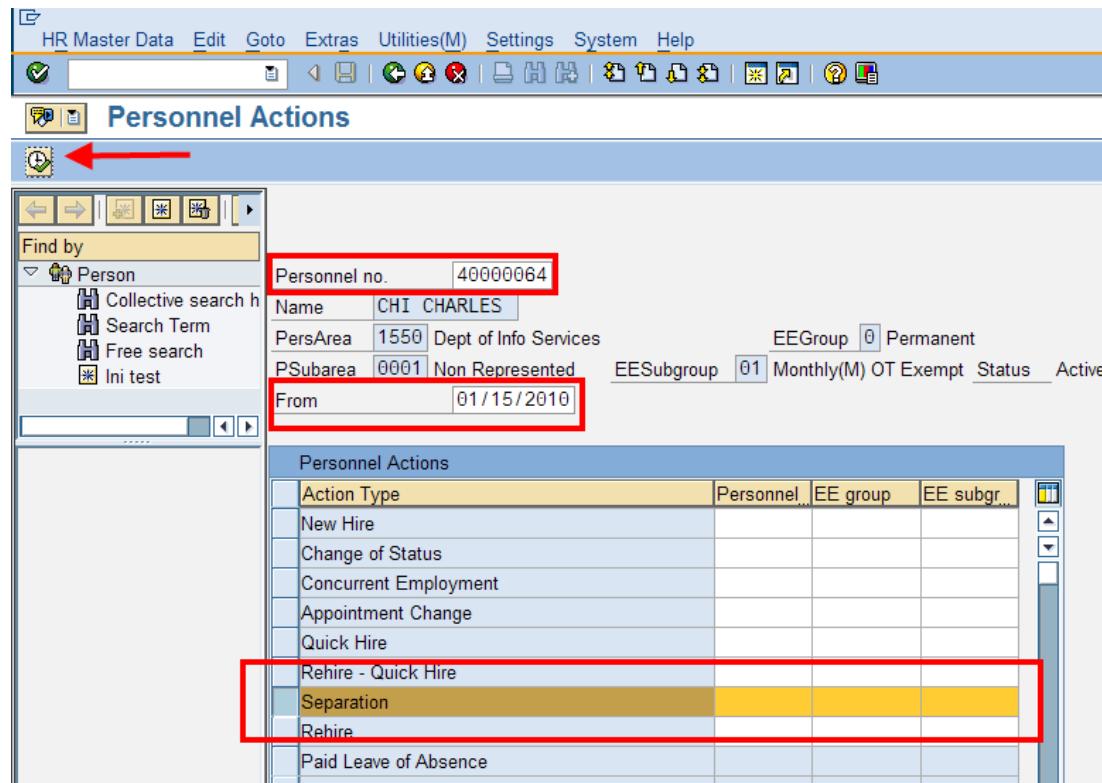
# Separation Action

- To create a Separation Action using the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
  - Or enter transaction code **PA40** in the **Command** field
- Using the action will ensure that all required infotype records are created.



# Separation Personnel Action

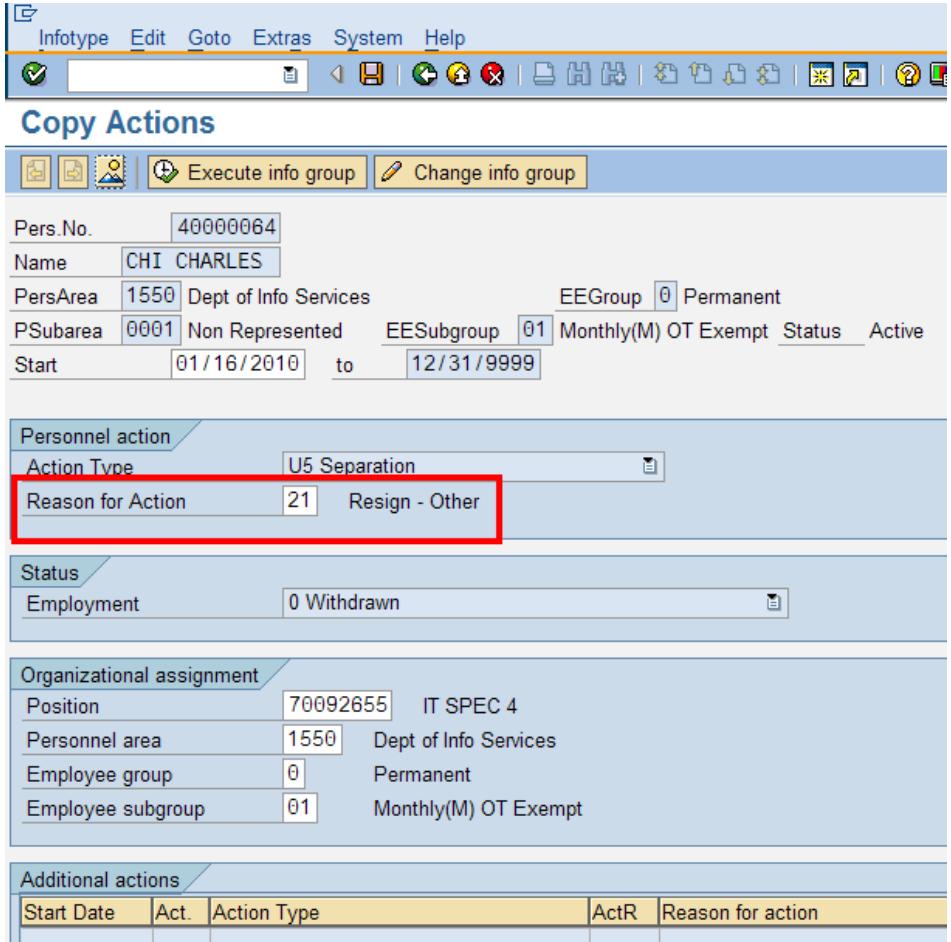
- A Personnel Number is required to process a Separation action.
- Fields to complete:
  - **From** (Last working day in the office)
  - **Personnel no.**
- To access the Separation action, click the box to the left of Separation.
- Click  **(Execute)**.



# **Actions (0000)**

- The Actions infotype records the Separation in HRMS, as well as provide a reason for the action.
- Fields to complete
  - **Reason for Action** (use drop down)
- When finished, click  (Enter) and then click  (Save).

**Note:** The system has added a day to the Start date. The start date is the first day the employee is separated from state service. Also the Employment status now reads 'withdrawn'.



The screenshot shows the SAP HRMS 'Copy Actions' infotype screen. The top navigation bar includes Infotype, Edit, Goto, Extras, System, and Help. Below the menu is a toolbar with various icons. The main area is titled 'Copy Actions' and contains several sections:

- Pers. No.:** 40000064
- Name:** CHI CHARLES
- PersArea:** 1550 Dept of Info Services
- PSubarea:** 0001 Non Represented
- EEGroup:** 0 Permanent
- EESubgroup:** 01 Monthly(M) OT Exempt
- Status:** Active
- Start:** 01/16/2010 to 12/31/9999

**Personnel action**

Action Type	U5 Separation
Reason for Action	21 Resign - Other

**Status**

Employment	0 Withdrawn
------------	-------------

**Organizational assignment**

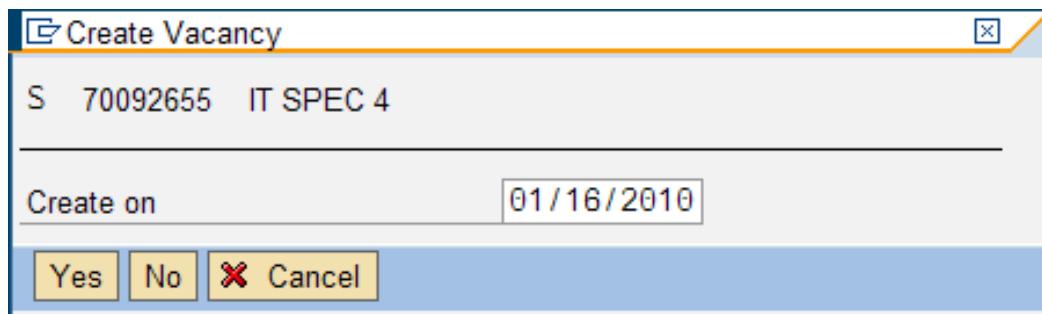
Position	70092655 IT SPEC 4
Personnel area	1550 Dept of Info Services
Employee group	0 Permanent
Employee subgroup	01 Monthly(M) OT Exempt

**Additional actions**

Start Date	Act.	Action Type	ActR	Reason for action

# Create Vacancy

- Upon saving the *Actions* infotype (0000), a Create Vacancy pop-up window will appear. This information is stored in the *Position Vacancy* infotype in Organizational Management.
- Click ‘Yes’ to Create the vacancy.
- Click ‘No’ if the position is multi-filled.

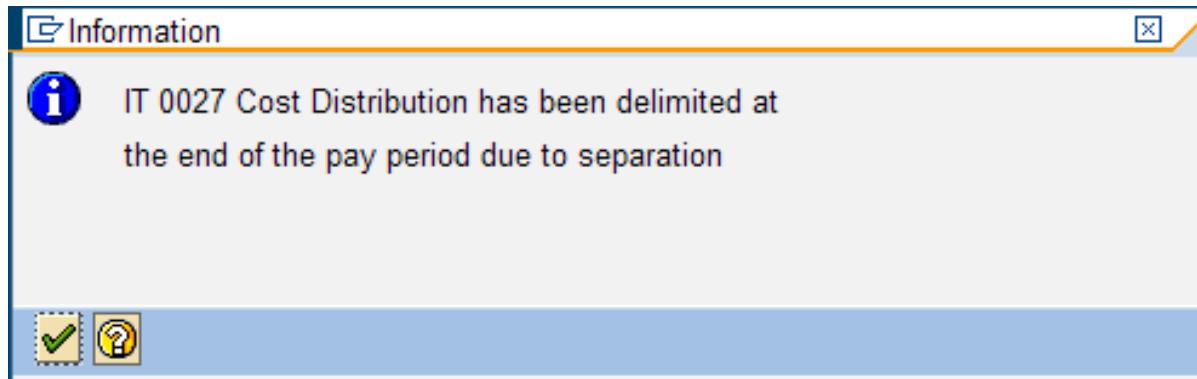


**Note:** If the position is multi-filled select ‘No’.

After saving Basic Pay (0008), click (Exit) to exit the action.

# **Delimiting *Cost Distribution* (0027)**

- For Employees who have an existing *Cost Distribution* (0027) established, the system will automatically delimit the infotype ending the last day of the pay period.



**Note:** This will not appear for every employee.

# ***Organizational Assignment (0001)***

**Note:** The position number located in *Organizational Assignment (0001)* will automatically change to 99999999 (system's position default) on a Separation action. **Do not** change this number back to the appointment position number. This information will be available in the infotype's history.

The screenshot shows the SAP Infotype 'Display Organizational Assignment' (0001) screen. The top navigation bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the title 'Display Organizational Assignment' is a toolbar with various icons. The main area is divided into several sections:

- Personnel No.**: 40000064, **Name**: CHI CHARLES
- PersArea**: 1550, **Dept of Info Services**, **EEGroup**: 0 P
- PSubarea**: 0001, **Non Represented**, **EESubgroup**: 01 Monthly(M) OT
- Start**: 01/16/2010, **to**: 12/31/9999, **Chng**: 01/25
- Enterprise structure**:
  - CoCode**: WA01, **STATE OF WASHINGTON**
  - Pers.area**: 1550, **Dept of Info Services**, **Subarea**: 0
  - Cost Ctr**: 1550000000, **DEFAULT AGENCY**, **Bus. Area**: 1, **Fund**
- Personnel structure**:
  - EE group**: 0, **Permanent**, **Payr.area**
  - EE subgroup**: 01, **Monthly(M) OT Exempt**, **Contract**
- Organizational plan**:
  - Position**: 99999999, **Integration: default posi**
  - Job key**: 50001666, **IT SPEC 4**
  - Exempt**: N
  - Org. Unit**: 30000877, **Command Center (Grave)**
  - Org.key**: 4640
- Administrator**: PersAdmin, Time, PayrAdmin

# Personnel Administration / Payroll Handoff

- After all necessary personnel updates are made to the employee's information, the employee information is transferred to the Payroll Processor.
- Once the pay and benefits information is entered into HRMS, the employee has been rehired and is eligible for pay.
- After the separation, the employee's personnel number remains exclusive to their file.



For example: If John retires in 2009 and decides to return to employment in 2010, his personnel number from his last employment is still valid and will identify his record in 2010. When John returns back to state employment, he will be considered a *Rehire*.

After saving, click (Exit) to exit the action.

# **HRMS**

# **Activity**



## **Process Employee Separation**

# Maintain Master Data – Review

*When do you use the action?*

*When do you use the maintenance transaction?*

Scenario	Transaction Code	Function
Hire a new employee		
Spelling Error in employee's name		
Employee going on long-term Leave of Absence		
Hand-off to Payroll to complete Hire Action		
Employee resigns from employment		
View employee's <b>Basic Pay (0008)</b>		
Update employee's education.		

# **Personnel Administration Reports**

# Personnel Administration Reports

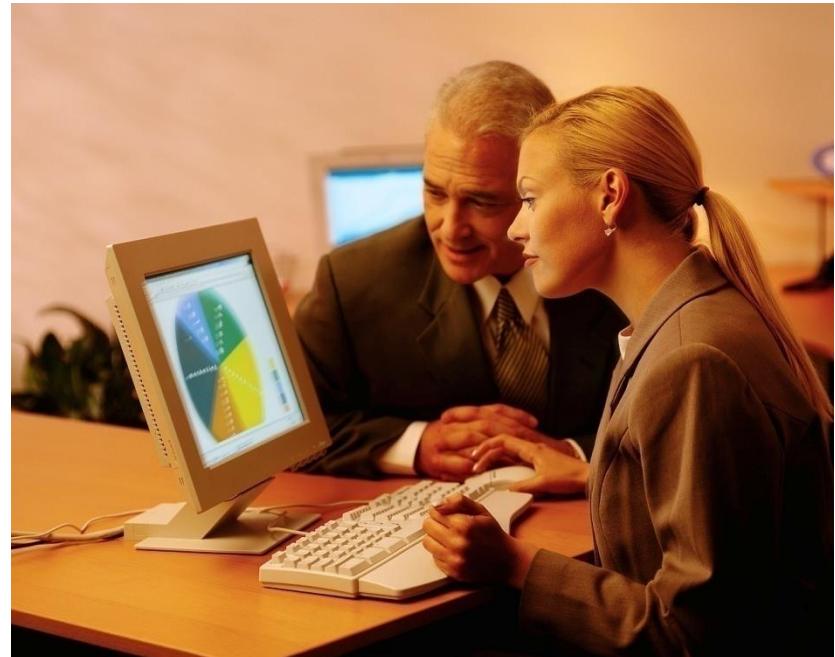
Upon completion of this section you will be able to:

Learn the basic components of running reports needed to complete Personnel Administration tasks.

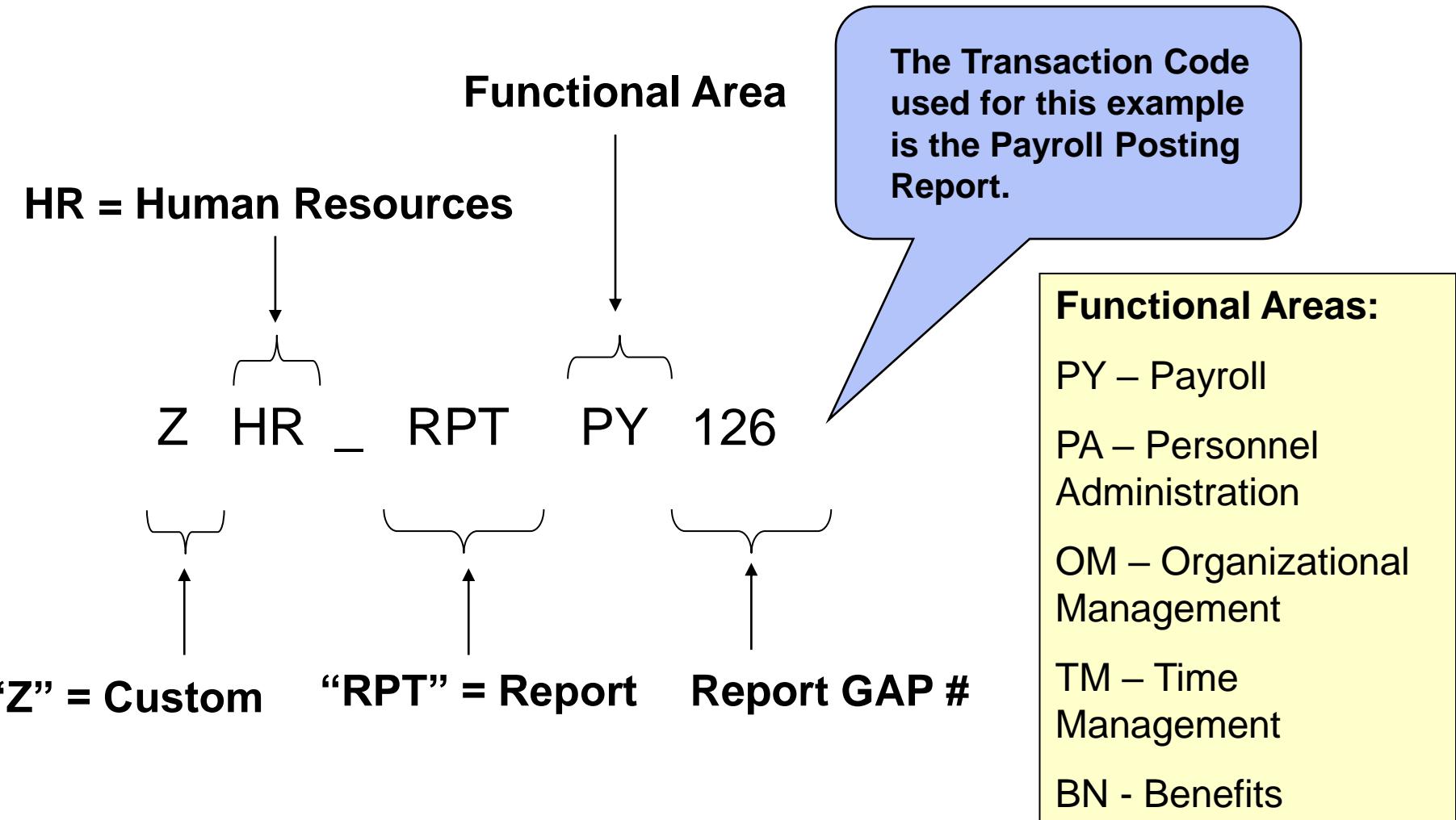


# Reporting in HRMS

- HRMS integration provides the capability to run reports within Personnel Areas (agencies or sub-agencies).
- Generating reports allows you to process information quickly to support decision making.
- Ability to export and manipulate “real-time” data.



# HRMS Customized Reporting - Transaction Code Map



# HRMS Reporting resources

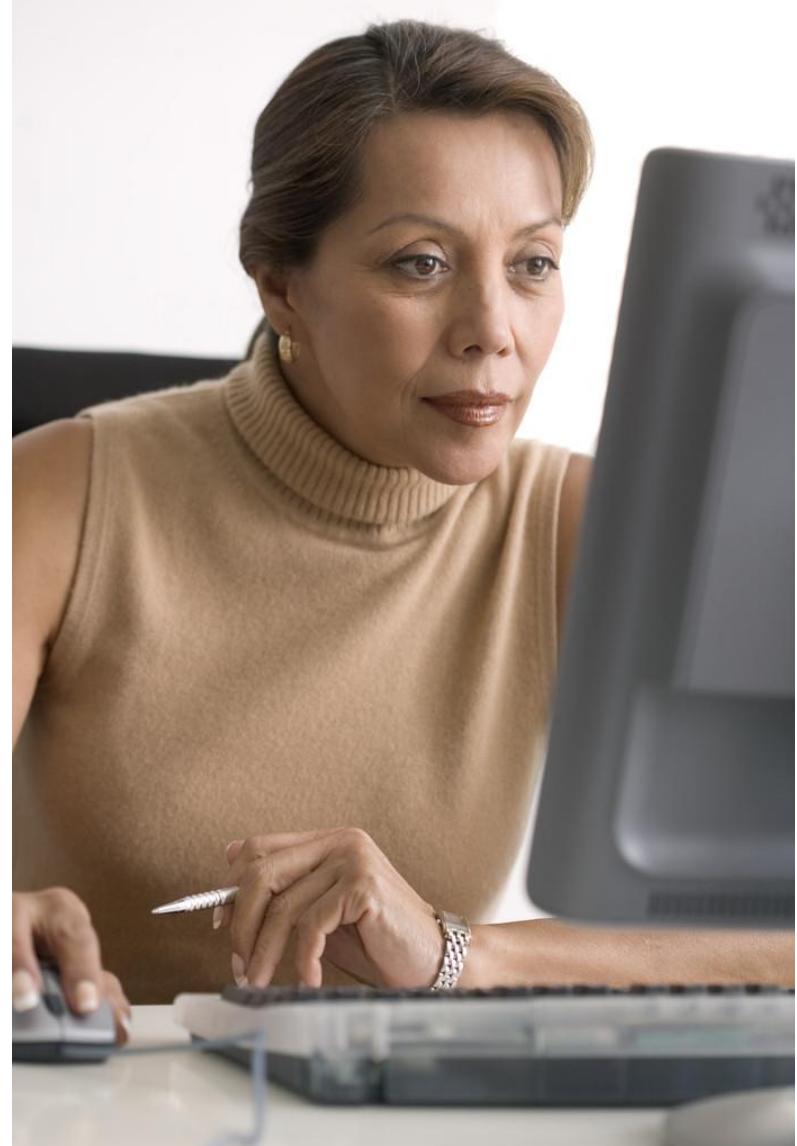


Visit the OLQR website  
(<http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference/>) for the following:

- HRMS Reports
  - [Variants Create and Retrieve](#)
- Job Aids A-Z

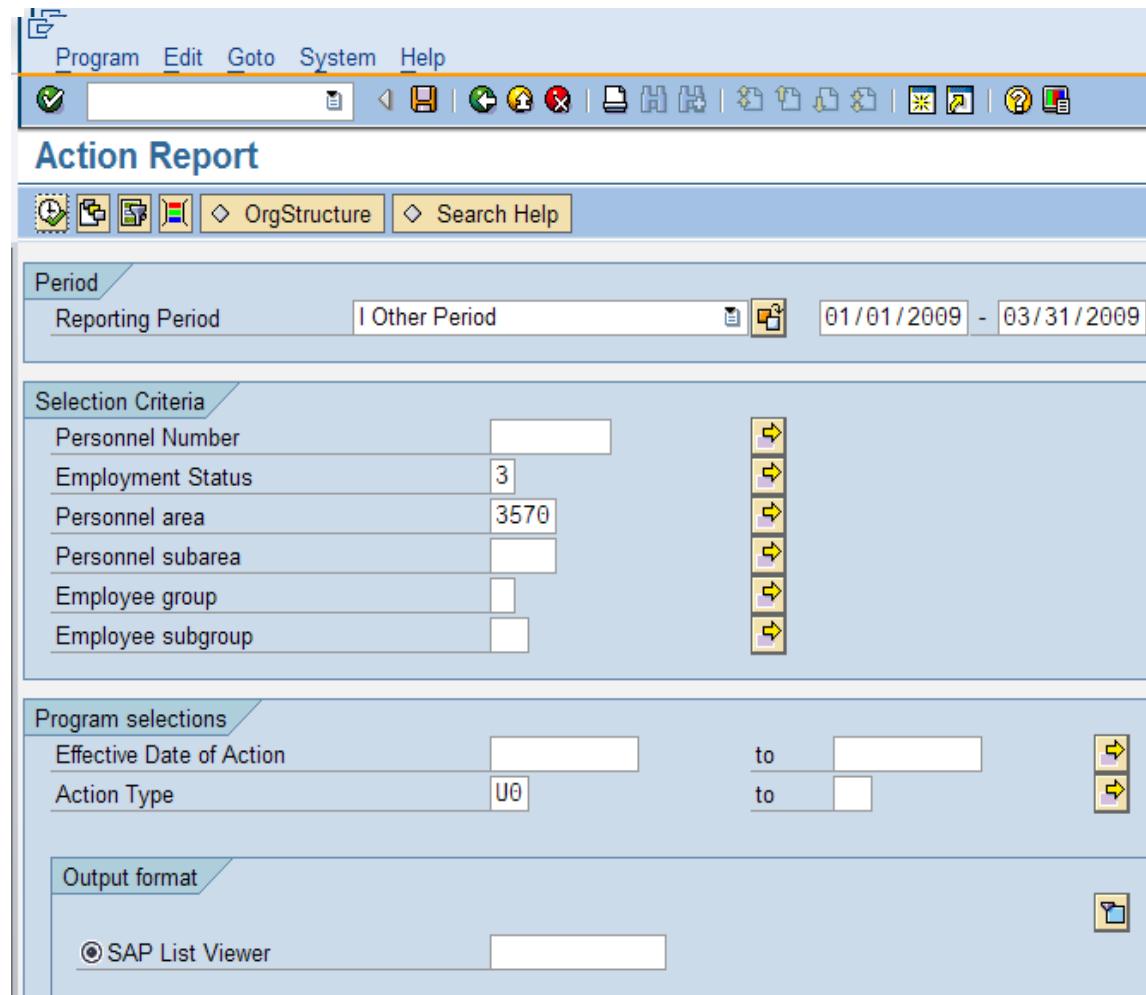
# Actions Report

- Used to identify new hires, transfers and/or separations within the organization.
- Run the report when analysis on new hires is needed.
- Access the report using the transaction code  
**ZHR\_RPTPA457.**

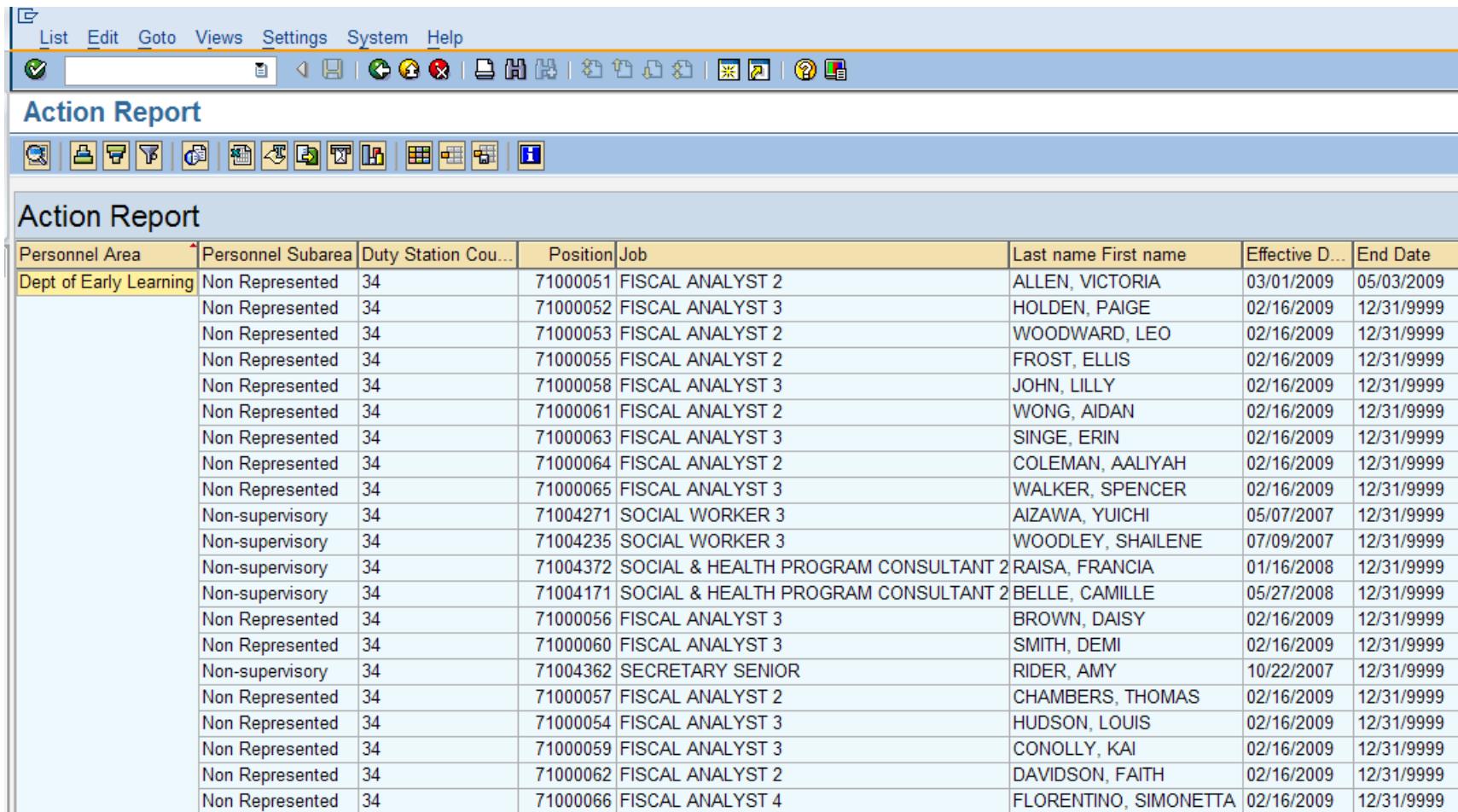


# Actions Report

- Select a Reporting Period as required
- Selection Criteria include the following conditional fields:
  - Personnel Number
  - Employment Status
  - Personnel area
- Enter the conditional Program selections
  - Effective Date of Action
  - Action Type
- Click  (Execute)



# Viewing Results: Actions Report



The screenshot shows a software interface for viewing personnel actions. The title bar reads "Action Report". The menu bar includes "List", "Edit", "Goto", "Views", "Settings", "System", and "Help". Below the menu is a toolbar with various icons. The main area displays a table titled "Action Report" with the following columns: Personnel Area, Personnel Subarea, Duty Station Cou..., Position, Job, Last name First name, Effective D..., and End Date.

Personnel Area	Personnel Subarea	Duty Station Cou...	Position	Job	Last name First name	Effective D...	End Date
Dept of Early Learning	Non Represented	34	71000051	FISCAL ANALYST 2	ALLEN, VICTORIA	03/01/2009	05/03/2009
	Non Represented	34	71000052	FISCAL ANALYST 3	HOLDEN, PAIGE	02/16/2009	12/31/9999
	Non Represented	34	71000053	FISCAL ANALYST 2	WOODWARD, LEO	02/16/2009	12/31/9999
	Non Represented	34	71000055	FISCAL ANALYST 2	FROST, ELLIS	02/16/2009	12/31/9999
	Non Represented	34	71000058	FISCAL ANALYST 3	JOHN, LILLY	02/16/2009	12/31/9999
	Non Represented	34	71000061	FISCAL ANALYST 2	WONG, AIDAN	02/16/2009	12/31/9999
	Non Represented	34	71000063	FISCAL ANALYST 3	SINGE, ERIN	02/16/2009	12/31/9999
	Non Represented	34	71000064	FISCAL ANALYST 2	COLEMAN, AALIYAH	02/16/2009	12/31/9999
	Non Represented	34	71000065	FISCAL ANALYST 3	WALKER, SPENCER	02/16/2009	12/31/9999
	Non-supervisory	34	71004271	SOCIAL WORKER 3	AIZAWA, YUICHI	05/07/2007	12/31/9999
	Non-supervisory	34	71004235	SOCIAL WORKER 3	WOODLEY, SHAILENE	07/09/2007	12/31/9999
	Non-supervisory	34	71004372	SOCIAL & HEALTH PROGRAM CONSULTANT 2	RAISA, FRANCIA	01/16/2008	12/31/9999
	Non-supervisory	34	71004171	SOCIAL & HEALTH PROGRAM CONSULTANT 2	BELLE, CAMILLE	05/27/2008	12/31/9999
	Non Represented	34	71000056	FISCAL ANALYST 3	BROWN, DAISY	02/16/2009	12/31/9999
	Non Represented	34	71000060	FISCAL ANALYST 3	SMITH, DEMI	02/16/2009	12/31/9999
	Non-supervisory	34	71004362	SECRETARY SENIOR	RIDER, AMY	10/22/2007	12/31/9999
	Non Represented	34	71000057	FISCAL ANALYST 2	CHAMBERS, THOMAS	02/16/2009	12/31/9999
	Non Represented	34	71000054	FISCAL ANALYST 3	HUDSON, LOUIS	02/16/2009	12/31/9999
	Non Represented	34	71000059	FISCAL ANALYST 3	CONOLLY, KAI	02/16/2009	12/31/9999
	Non Represented	34	71000062	FISCAL ANALYST 2	DAVIDSON, FAITH	02/16/2009	12/31/9999
	Non Represented	34	71000066	FISCAL ANALYST 4	FLORENTINO, SIMONETTA	02/16/2009	12/31/9999

# Viewing Results: Actions Report – cont'd

Act.	Reason for Action	Org. un.	EO	Personnel ID	Name of Action Type
U0	Probationary Appointment	31000051	01	05000100	New Hire
U0	Probationary Appointment	31000051		05000101	New Hire
U0	Probationary Appointment	31000051		05000102	New Hire
U0	Probationary Appointment	31000051		05000104	New Hire
U0	Probationary Appointment	31000051		05000107	New Hire
U0	Probationary Appointment	31000051		05000110	New Hire
U0	Probationary Appointment	31000051		05000112	New Hire
U0	Probationary Appointment	31000051		05000113	New Hire
U0	Probationary Appointment	31000051		05000114	New Hire
U0	Probationary Appointment	31003180		40000426	New Hire
U0	Probationary Appointment	31003181		40000428	New Hire
U0	Probationary Appointment	31003180		40000430	New Hire
U0	Probationary Appointment	31003181		40000431	New Hire
U0	Probationary Appointment	31000051	02	05000105	New Hire
U0	Probationary Appointment	31000051		05000109	New Hire
U0	Probationary Appointment	31003179		40000429	New Hire
U0	Probationary Appointment	31000051	03	05000106	New Hire
U0	Probationary Appointment	31000051	04	05000103	New Hire
U0	Probationary Appointment	31000051		05000108	New Hire
U0	Probationary Appointment	31000051		05000111	New Hire
U0	Probationary Appointment	31000051	05	05000115	New Hire

# **HRMS**

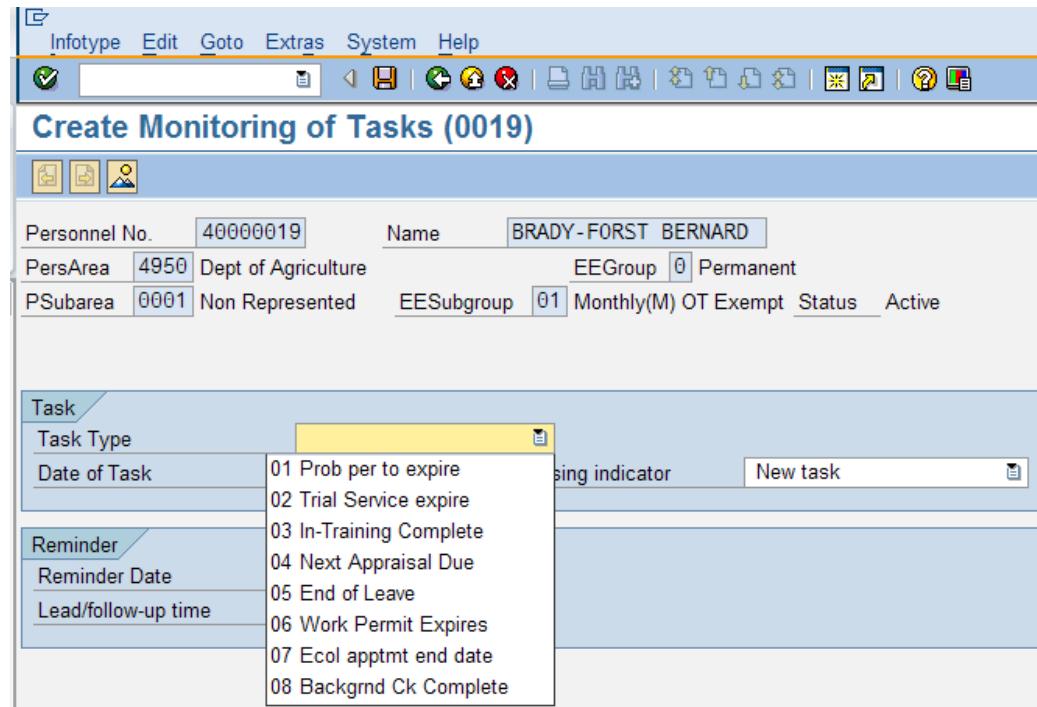
# **Activity**



**Action Report –**  
**ZHR\_RPTPA457**

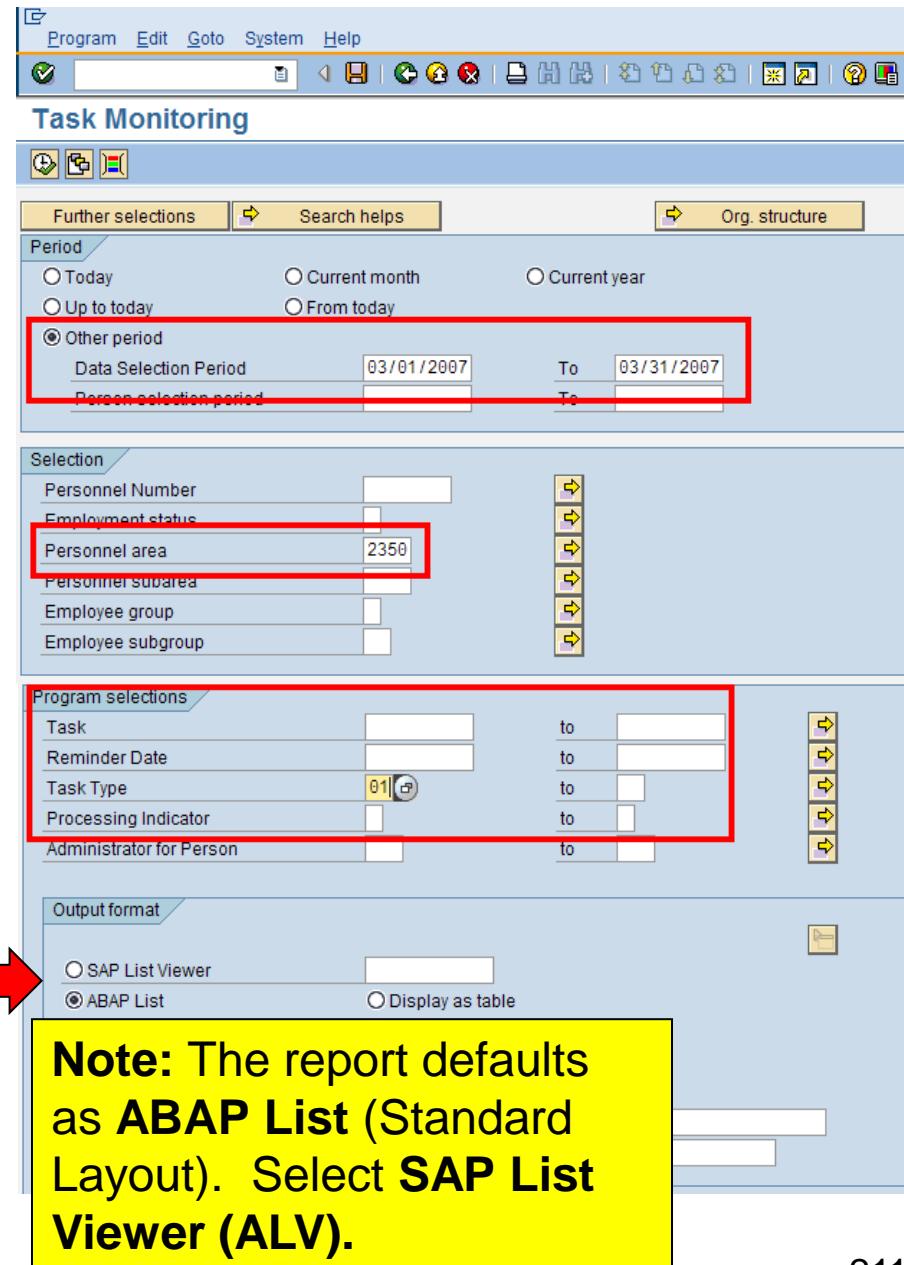
# Task Monitoring Report

- The Task Monitoring Report identifies what tasks have been created on the *Monitoring of Task* infotype (0019).
- Run the report when analyzing tasks created for a specific period or due to expire.
  - Example: Identify employees who probation period or trial service is to end.
- Access the Task Monitoring Report using the transaction code **S\_PH0\_48000450**.



# Task Monitoring

- As required, enter or select a Period
- Conditional Selection criteria include:
  - Personnel Number
  - Employment status
  - Personnel area
  - Task
  - Reminder Date
  - Processing Indicator
- When finished, click  (Execute).



# Viewing Results: Task Monitoring

The screenshot shows the SAP Task Monitoring interface. The top menu bar includes List, Edit, Goto, System, and Help. Below the menu is a toolbar with various icons. The main title is "Task Monitoring". A toolbar below the title contains icons for ALV, ABC, EIS, and Selections. The main area displays task logs in a table format.

Task	Reminder	P Processing indicator
Task Type		TT
Personne First name	Last name	
Remarks (Row 1)		
Remarks (Row 2)		
Remarks (Row 3)		
Task	04/01/2008	
04/01/2008 03/18/2008	New task	02
Trial Service expire		
40000209 TAIN	TS'UI	
04/01/2008 03/18/2008	New task	02
Trial Service expire		
40000334 WENDY	BUNNELL	
Task	04/16/2008	
04/16/2008 04/15/2008	New task	01
Prob per to expire		
40000365 ISHIN	MORISHITA	

# **HRMS**

# **Activity**



**Task Monitoring –**  
**S\_PH0\_48000450**

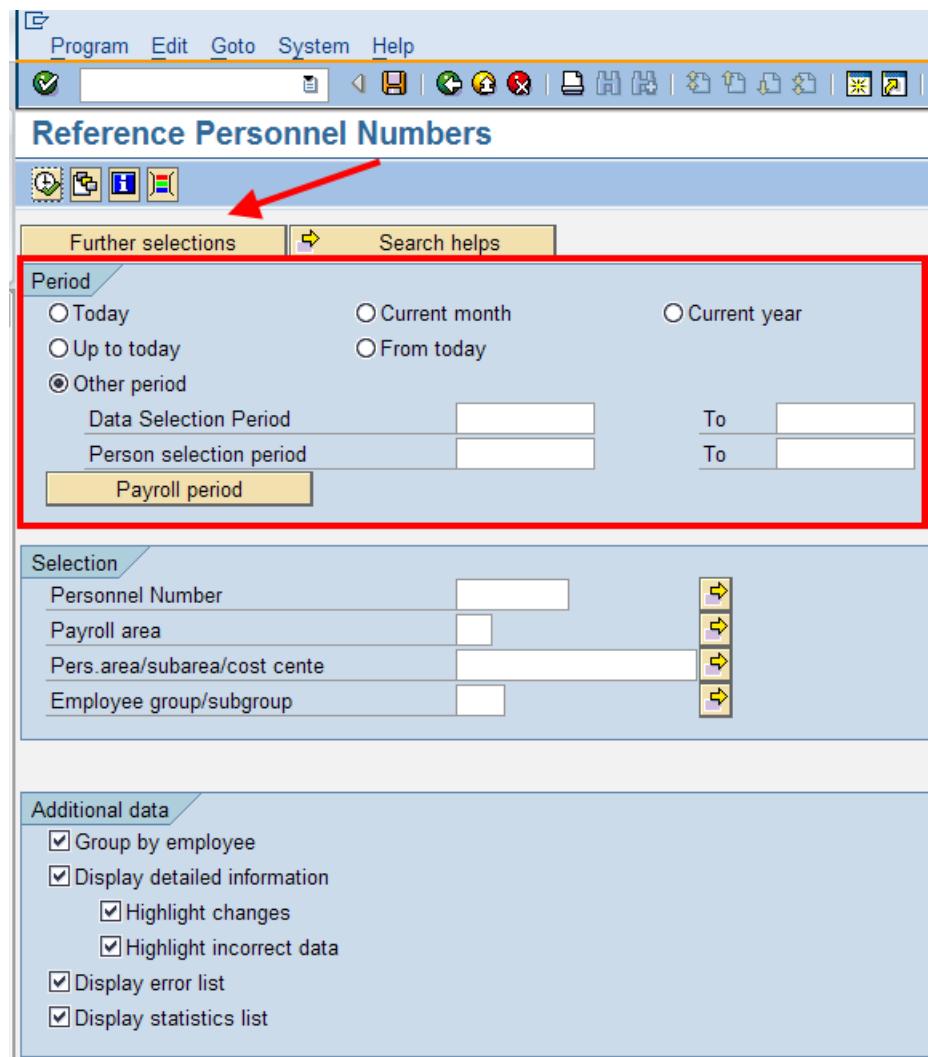
# Reference Personnel Numbers

- Used to identify employees in the personnel area that have a Reference Personnel Number (two or more personnel numbers) created in HRMS.
- Run the report when analysis on Reference Personnel Numbers is needed.
- Access the report using the transaction code  
**S\_AHR\_61016358.**



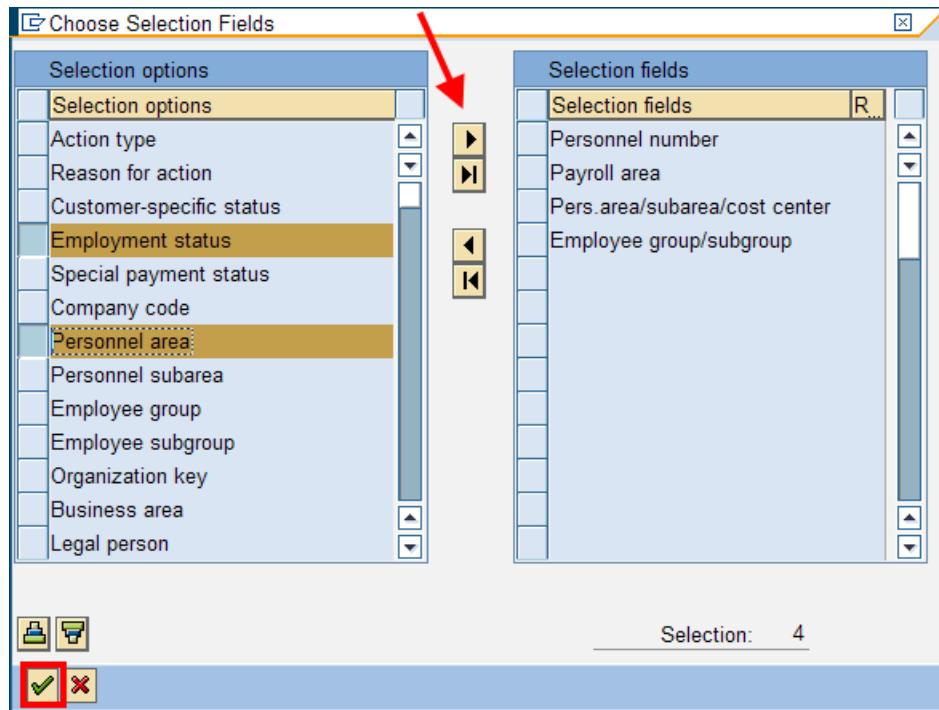
# Reference Personnel Numbers

- As required, enter the Period
- To add additional Selection fields click on the Further Selection option (Personnel Area and Employment Status is currently not displayed)



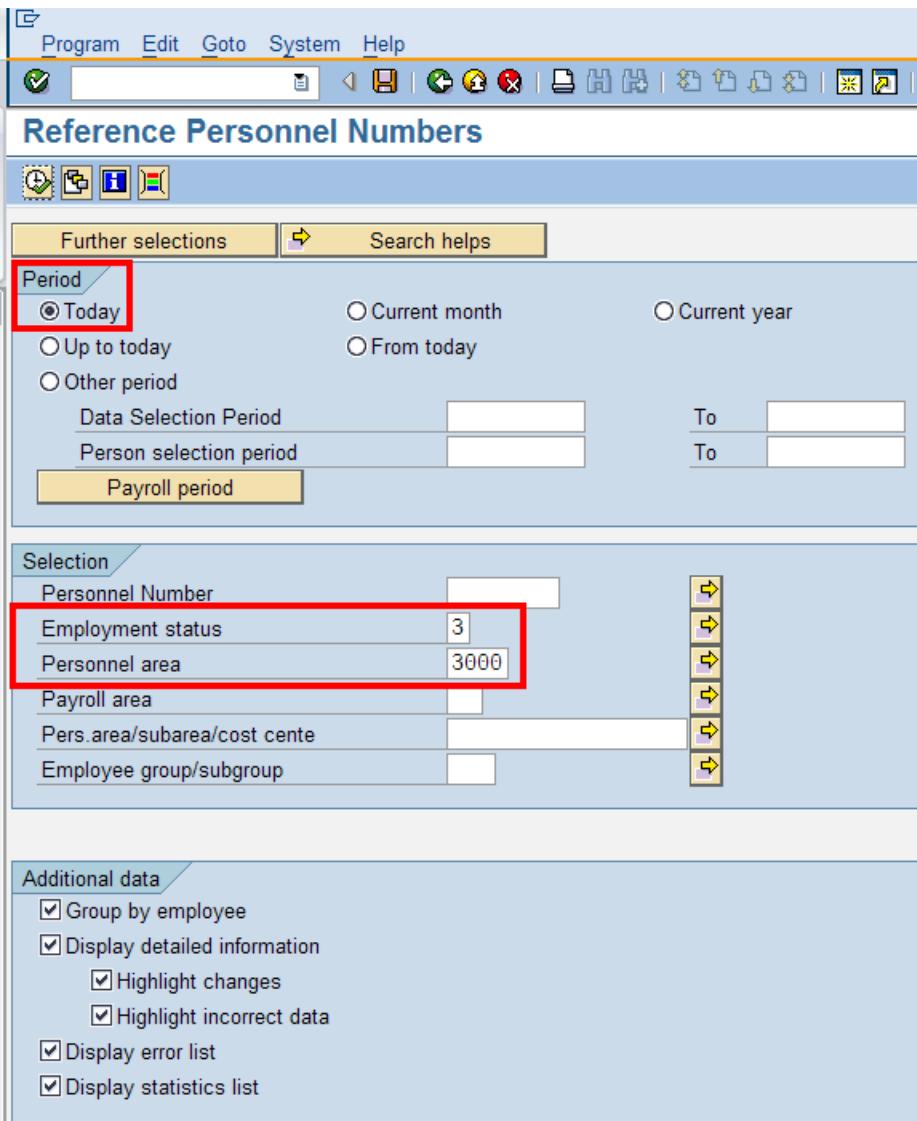
# Reference Personnel Numbers

- From the Selection box, select the desired fields.
  - Employment Status
  - Personnel area
- Click  (Choose) to select the fields.
- Click  (Continue (Enter)).



# Reference Personnel Numbers

- Fields to complete:
  - Employment Status
    - (3 – Active)
  - Personnel Area
    - (3008 – DSHS WSH)
- Click  (Execute).



The screenshot shows the SAP Reference Personnel Numbers interface. At the top, there's a toolbar with various icons. Below it, the title "Reference Personnel Numbers" is displayed. The main area is divided into several sections:

- Period:** A group of radio buttons for selecting a time range. The "Today" option is selected and highlighted with a red box.
- Data Selection Period:** A date range input field.
- Person selection period:** A date range input field.
- Payroll period:** A date range input field.
- Selection:** A section for specifying search criteria. It includes fields for Personnel Number, Employment status (set to 3), Personnel area (set to 3008), Payroll area, Pers.area/subarea/cost cente, and Employee group/subgroup. The "Employment status" and "Personnel area" fields are also highlighted with a red box.
- Additional data:** A section with several checkboxes:
  - Group by employee (checked)
  - Display detailed information (checked)
    - Highlight changes (checked)
    - Highlight incorrect data (checked)
  - Display error list (checked)
  - Display statistics list (checked)

# Viewing Results: Reference Personnel Numbers

The screenshot shows a software application window titled "Reference Personnel Numbers". The menu bar includes "List", "Edit", "Goto", "System", and "Help". The toolbar contains various icons for file operations like Open, Save, Print, and Search.

Name: HALE JASPER  
Reporting period: 01/01/1800 to 12/31/9999

Sort: in ascending order by pers.no.

PerNo.	StaffStatus	Company code	Personnel area	EmplGroup	EmplSubgroup	Empl. %
Data in period from 06/16/2006 to 12/07/2006:						
40000440	3 Active	WA01 STATE OF WASHIN	3024 DSHS Region 4	0 Permane	05 H-OT Elig>40hrs/wk	100.00 %
40000441	3 Active	WA01 STATE OF WASHIN	3000 DSHS Headquarte	0 Permane	00 Hourly (H) OT Exempt	100.00 %
Data in period from 12/08/2006 to 03/15/2008:						
40000440	3 Active	WA01 STATE OF WASHIN	3024 DSHS Region 4	1 Tempora	05 H-OT Elig>40hrs/wk	100.00 %
40000441	3 Active	WA01 STATE OF WASHIN	3000 DSHS Headquarte	0 Permane	00 Hourly (H) OT Exempt	100.00 %
Data in period from 03/16/2008 to 04/15/2008:						
40000440	3 Active	WA01 STATE OF WASHIN	3024 DSHS Region 4	0 Permane	05 H-OT Elig>40hrs/wk	100.00 %
40000441	3 Active	WA01 STATE OF WASHIN	3000 DSHS Headquarte	0 Permane	00 Hourly (H) OT Exempt	100.00 %
Data in period from 04/16/2008 to 12/31/9999:						
40000440	3 Active	WA01 STATE OF WASHIN	3024 DSHS Region 4	0 Permane	05 H-OT Elig>40hrs/wk	100.00 %
40000441	3 Active	WA01 STATE OF WASHIN	3000 DSHS Headquarte	0 Permane	05 H-OT Elig>40hrs/wk	100.00 %

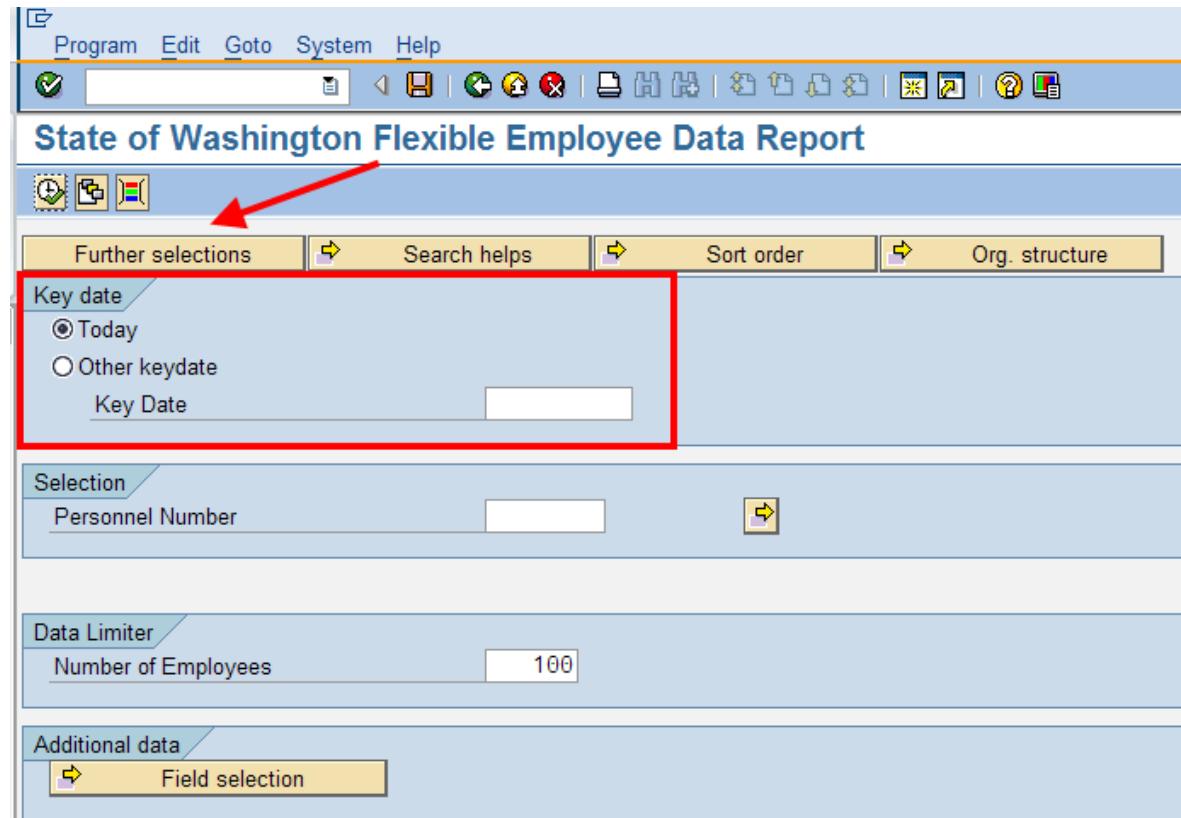
No incorrect personnel numbers found  
No incomplete table entries found

# **Flexible Employee Data Report**

- Provides agency users the ability to create their own reports by selecting from a dropdown list of fields designated for end user ADHOC reporting.
- Security authorization to view selected fields will be driven by the end users active security profile. Only authorized employee records and associated infotype fields will be presented in the report.
- HRMS also provides a standard Flexible Employee Data report. This report has the same selection concepts, but provides additional field options. To access the standard report, use transaction code **S\_AHR\_61016362**.
- Access the customized report using the transaction code **ZHR\_RPTPAN02**.

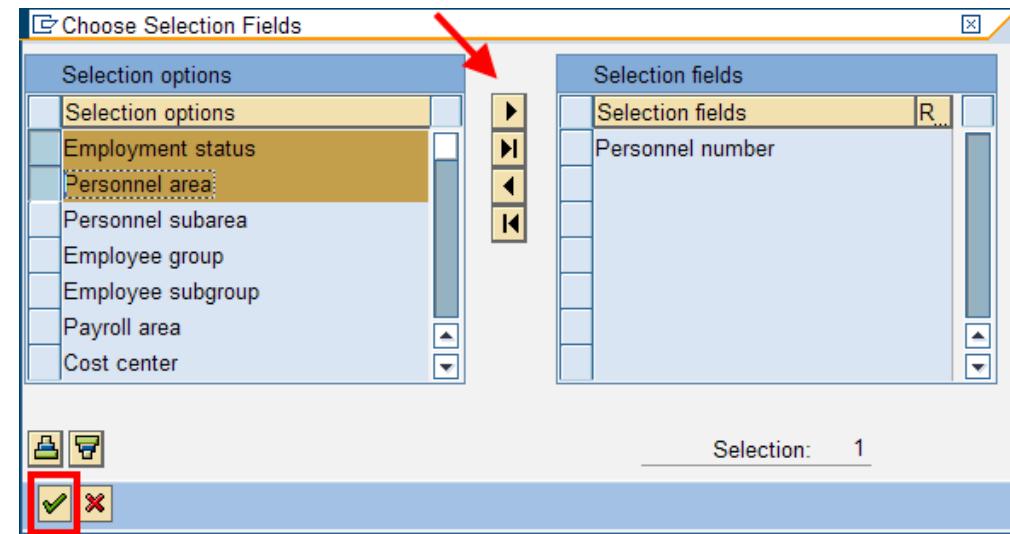
# Flexible Employee Data Report – ZHR\_RPTPAN02

- Enter a Key Date.
- To add additional Selection fields click on the Further Selection option.  
(Personnel Area and Employment Status is currently not displayed)



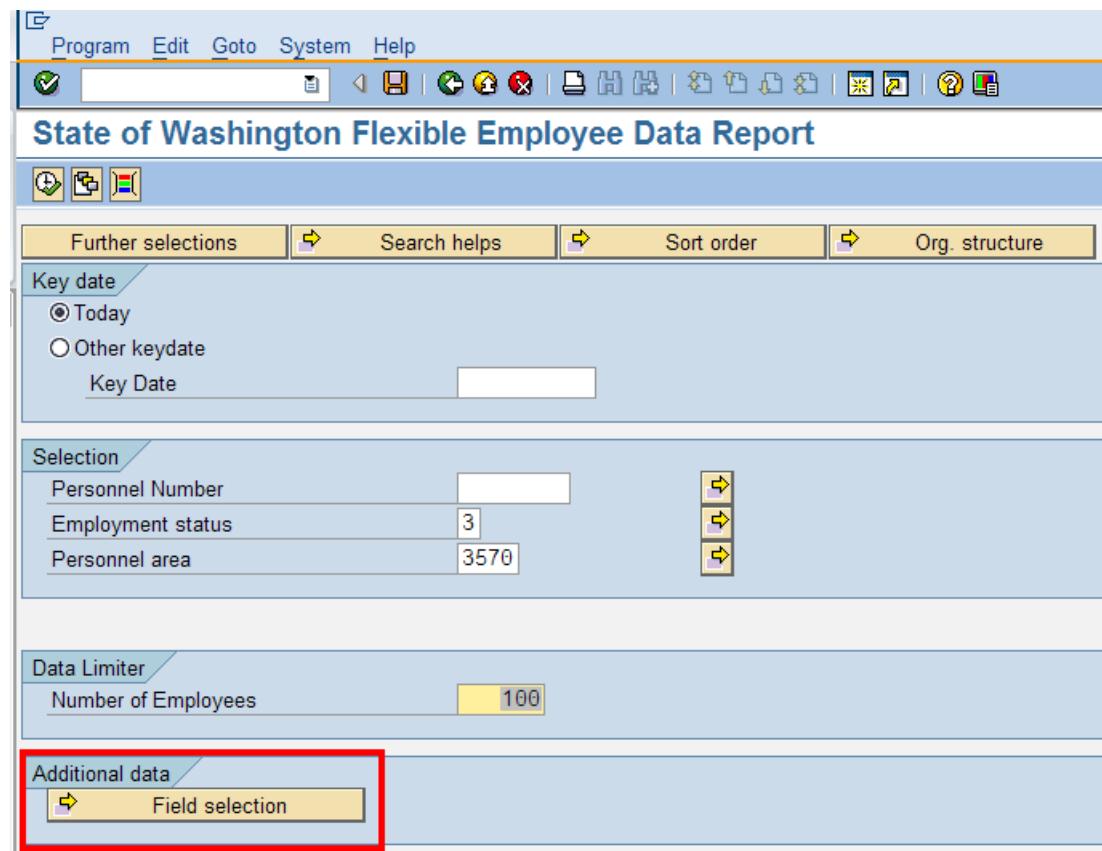
# Flexible Employee Data Report – ZHR\_RPTPAN02

- From the Selection box, select the desired fields.
  - Employment Status
  - Personnel area
- Click ► (Choose) to select the fields.
- Click ✓ (Continue (Enter)).



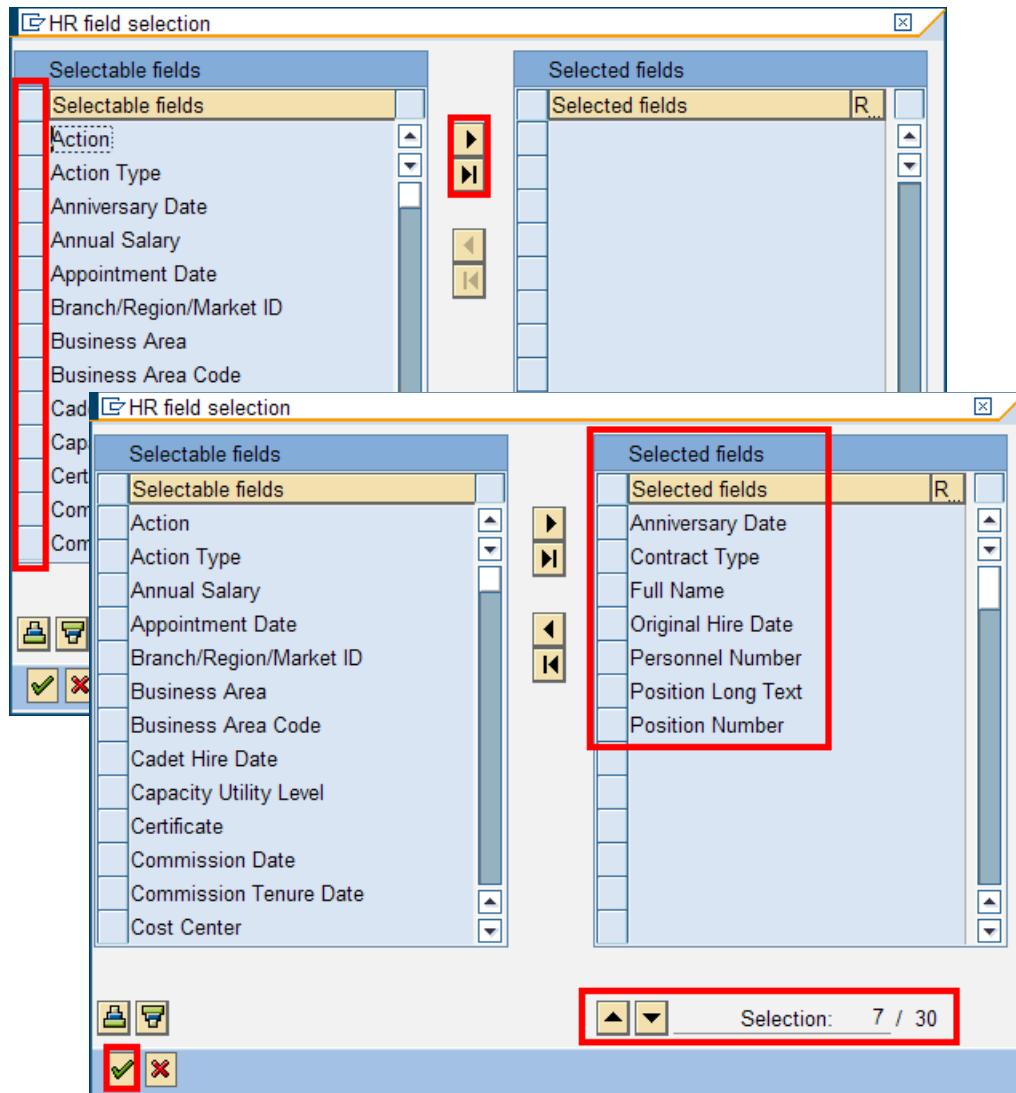
# Flexible Employee Data Report – ZHR\_RPTPAN02

- In the Additional Data section, select the Field selection to display additional data on the report.



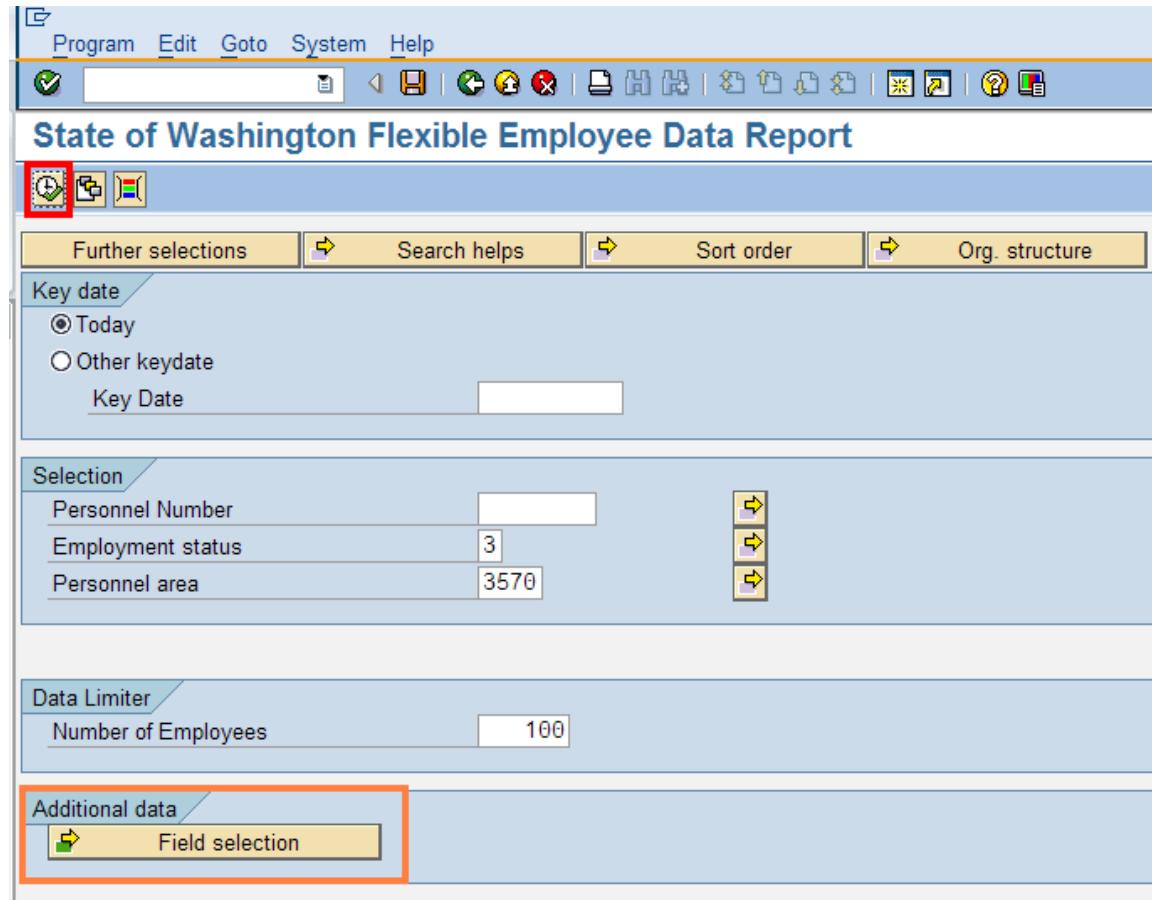
# Flexible Employee Data Report – ZHR\_RPTPAN02

- In the Additional Data section, select the Field selection to display additional data on the report.
- Click on the box to the right of the Selectable fields, then click on the  (choose arrows) to move the selected items to the Selected fields area.
- Click  **(Continue)** to return to the report.



# Flexible Employee Data Report – ZHR\_RPTPAN02

- Click  (Execute) to execute the report.



# Viewing Results: Flexible Employee Data Report

- In this example, the report displays the Employee's Contract Type, First Name, Last Name and Personnel Number.

The screenshot shows a software application window titled "State of Washington Flexible Employee Data Report". The window includes a toolbar with various icons, a menu bar with "List", "Edit", "Goto", "Views", "Settings", "System", and "Help", and a date range selector showing "Date Range: 05/12/2009 - 05/12/2009". The main content area displays a table with the following data:

Anniversary Date	Contract Type	Full Name	Original Hire Date	Personnel Number	Position Long Text	Position Number
02/16/2009	Non-Permanent	HOLDEN, PAIGE	02/16/2009	05000101	BENEFIT NEW HIRE 02	71000052
02/16/2009	Non-Permanent	WOODWARD, LEO	02/16/2009	05000102	BENEFIT NEW HIRE 03	71000053
02/16/2009	Non-Permanent	HUDSON, LOUIS	02/16/2009	05000103	BENEFIT NEW HIRE 04	71000054
02/16/2009	Non-Permanent	FROST, ELLIS	02/16/2009	05000104	BENEFIT NEW HIRE 05	71000055
02/16/2009	Non-Permanent	BROWN, DAISY	02/16/2009	05000105	BENEFIT NEW HIRE 06	71000056
02/16/2009	Non-Permanent	CHAMBERS, THOMAS	02/16/2009	05000106	BENEFIT NEW HIRE 07	71000057
02/16/2009	Non-Permanent	JOHN, LILLY	02/16/2009	05000107	BENEFIT NEW HIRE 08	71000058
02/16/2009	Non-Permanent	CONOLLY, KAI	02/16/2009	05000108	BENEFIT NEW HIRE 09	71000059
02/16/2009	Non-Permanent	SMITH, DEMI	02/16/2009	05000109	BENEFIT NEW HIRE 10	71000060
02/16/2009	Non-Permanent	WONG, AIDAN	02/16/2009	05000110	BENEFIT NEW HIRE 11	71000061
02/16/2009	Non-Permanent	DAVIDSON, FAITH	02/16/2009	05000111	BENEFIT NEW HIRE 12	71000062
02/16/2009	Non-Permanent	SINCE, ERIN	02/16/2009	05000112	BENEFIT NEW HIRE 13	71000063
02/16/2009	Non-Permanent	COLEMAN, AALIYAH	02/16/2009	05000113	BENEFIT NEW HIRE 14	71000064
02/16/2009	Non-Permanent	WALKER, SPENCER	02/16/2009	05000114	BENEFIT NEW HIRE 15	71000065
02/16/2009	Non-Permanent	FLORENTINO, SIMONETTA	02/16/2009	05000115	BENEFIT NEW HIRE 00	71000066

# Flexible Employee Data Report



## ■ Review OLQR User Procedures for:

- [Flexible Employee Data – Next Increase Date](#)
- [Flexible Employee Data Report\\_ Indirect Value](#)
- [Flexible Employee Data](#)

# **HRMS**

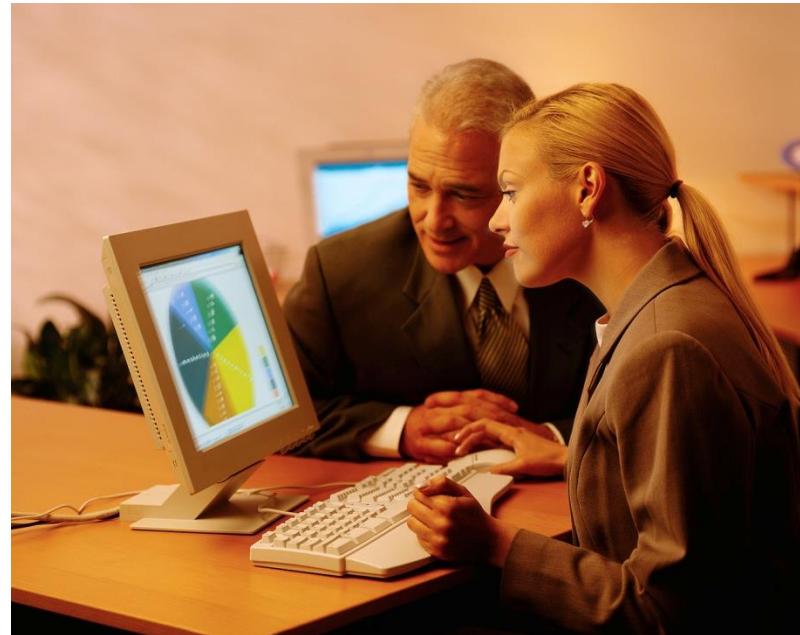
# **Activity**



**Flexible Employee Data Report –**  
**ZHR\_RPTPAN02**

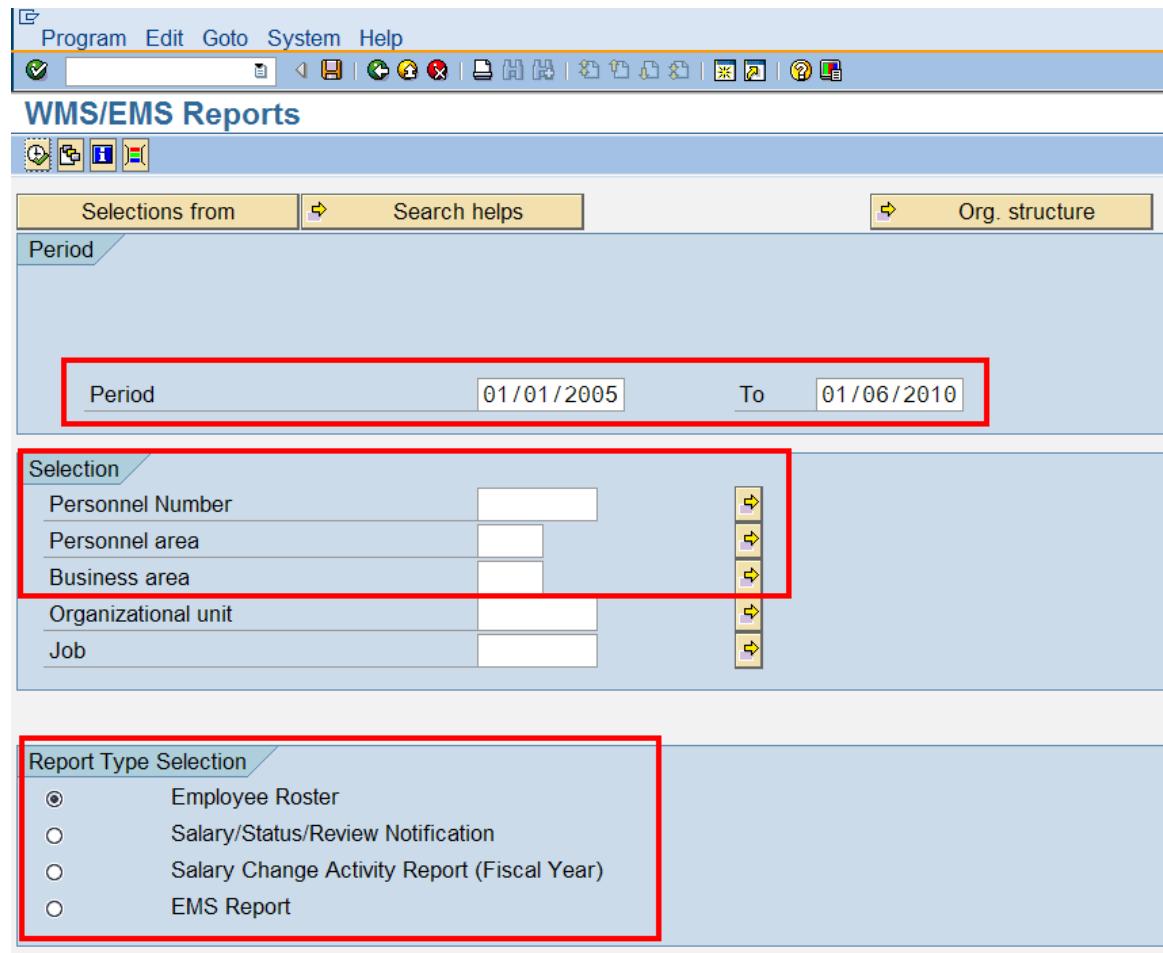
# WMS/EMS Reports

- Used to identify WMS employees in the agency as well as their salary, status and review notification.
- Access the report using the transaction code **ZHR\_RPTPA802**.



# WMS/EMS Reports

- As required, enter the Period
- Conditional selection criteria include:
  - Personnel area
  - Business area
- Choose a report type:
  - Employee Roster
  - EMS Report
- Click  (Execute) to execute the report.



# Viewing Results: Washington Management Services Reports

The screenshot shows an SAP HRMS interface titled "Washington Management Services Reports". The main title is "State of Washington - HRMS WMS Employee Roster". Below the title, report details are listed: Report ID: ZHR\_RPTPA802, User: JANETP, Run Date: 05/12/2009. The data is presented in a table with the following columns: Pers.Area, Job Number, Job Title, JVAC, Employee Name, Pernr, Pers. Sub, Status, Term Date, Perm, Position, Position Title, Org Code, and Org Abbr. Two rows of data are shown:

Pers.Area	Job Number	Job Title	JVAC	Employee Name	Pernr	Pers. Sub	Status	Term Date	Perm	Position	Position Title	Org Code	Org Abbr.
2350	50003923	WMS BAND 3	C3X	JACKSON, VICKEY	40000491	0002	Active		N	70018418	INS CNSLT PR MGR	30002847	Q2ICAD
3000	50003922	WMS BAND 2	B2X-0570	BOWEN, CAROL	40000178	0002	Active		N	70123283	AUD & CONS/CMPLD	30012645	EM EXECMSA

# Viewing Results: Washington Management Services Reports – cont'd

The screenshot shows a software application window titled "Washington Management Services Reports". The title bar includes standard menu options: List, Edit, Goto, Views, Settings, System, and Help. Below the menu is a toolbar with various icons for file operations like Open, Save, Print, and Search. The main title "Washington Management Services Reports" is displayed in blue text above a toolbar with several small icons. The main content area is titled "State of Washington - HRMS WMS Employee Roster". It displays report details: Report ID: ZHR\_RPTPA802, User: JANETP, Run Date: 05/12/2009, and Period: 04/01/2009 through 05/01/2009. A large table below lists employee information. The columns include Employee Group, Contract, Effective, Reason, Reason Text, Pay Scale, Total Sala, Anniversary, Appointmen, WMS Review, Next Incre, and Co... (partially cut off). The data shows two permanent employees: one on Probation due to Director Action and another on Acting with a salary adjustment by legal action.

Employee Group	Contract	Effective	Reason	Reason Text	Pay Scale	Total Sala	Anniversary	Appointmen	WMS Review	Next Incre	Co...
Permanent	Probation	09/01/2008	02	Rng Inc Due to Director Action	BAND 3	3,527.50	09/15/2001	04/01/2008			1
Permanent	Acting	09/01/2008	05	Salary Adjmnt by Leg Action	BAND 2	33.11	05/19/1976	03/01/2008			1

# **HRMS**

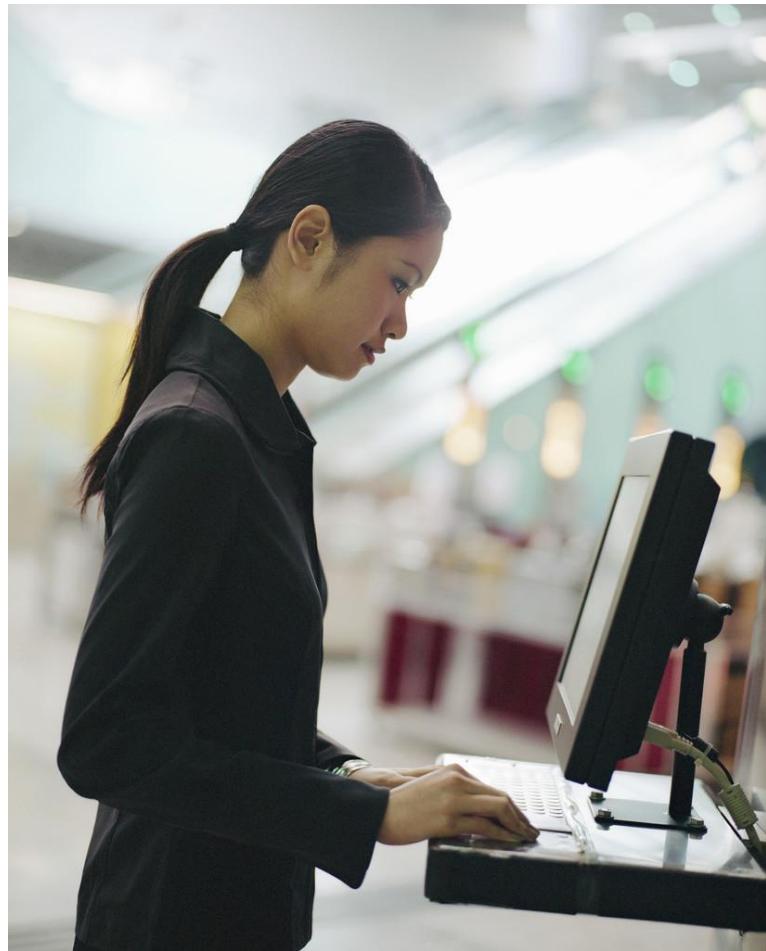
# **Activity**



**WMS/EMS Reports – ZHR\_RPTPA802**

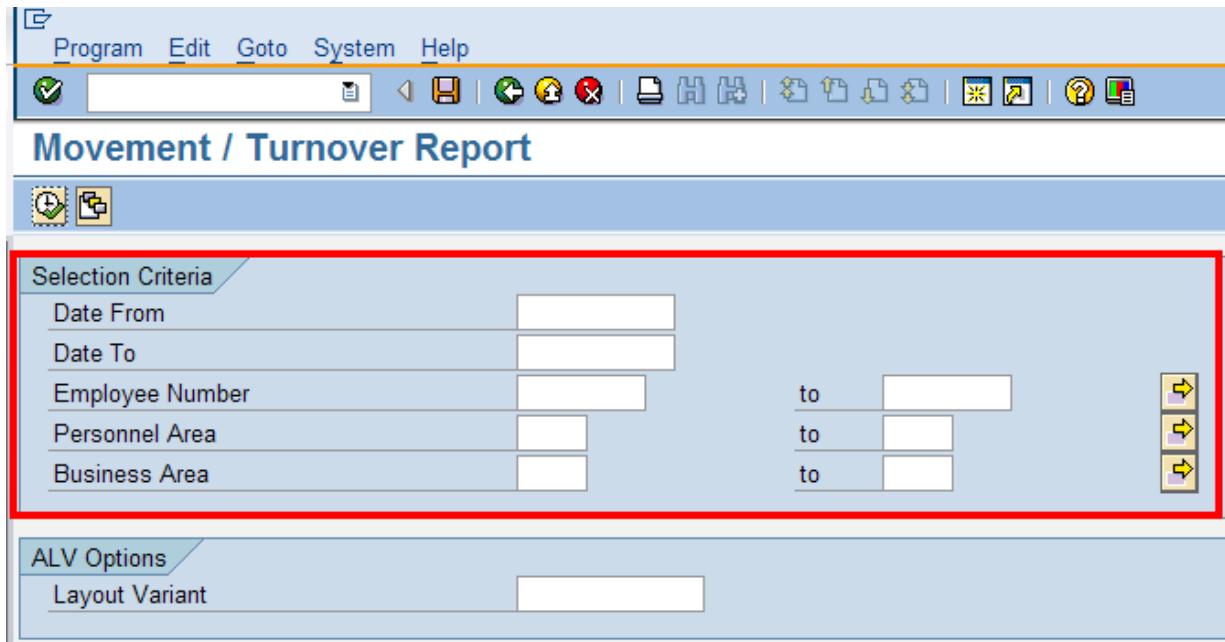
# Movement – Turnover Report

- Used to identify employees who have left an agency or sub-agency (Business / Personnel Area); have been hired into the agency or sub-agency (Business / Personnel Area); or who have moved into another sub-agency (Personnel Area) within the agency (Business Area)
- Run the report when analysis on new hires is needed.
- Access the report using the transaction code **ZHR\_RPTPYU26**.



# Movement – Turnover Report

- Conditional selection criteria include:
  - Date From
  - Date To
  - Personnel Area  
OR
  - Business Area
- Click  (Execute) to execute the report.



# Viewing Results: Movement – Turnover Report

The screenshot shows an SAP BusinessObjects interface. The top menu bar includes 'List', 'Edit', 'Goto', 'Views', 'Settings', 'System', and 'Help'. The SAP logo is in the top right. Below the menu is a toolbar with various icons. The main title is 'Movement / Turnover Report'. A secondary title below it reads 'State of Washington Movement/Turnover Report'. Below this, program details are listed: Program: ZHR\_RPTPYU26, User: JANETP, Run Date: 05/12/2009. A large table follows, displaying employee movement data:

Employee ...	Employee Name	Old Pers. Area	New Pers Area	Old Business ...	New Business...	Begin Date	End Date	Action	Action Description	Reason	Reason Description
5000000	CROSS, JASON		3000		3000	09/01/2008	12/31/9999	U0	New Hire	02	Probationary Appointment
40000208	LAI, MENG	5400	5400	5400	5400	10/01/2008	12/31/9999	U5	Separation	23	Retirement
40000371	SATO, SEIKA		4650		4650	09/01/2008	12/31/9999	U0	New Hire	02	Probationary Appointment
40000480	HOPKINS, ELIJAH		1000		1000	09/22/2008	12/31/9999	U0	New Hire	02	Probationary Appointment
40000483	CORNWELL, JOHN	4050	4050	4050	4050	09/16/2008	12/31/9999	U6	Rehire	23	Non-Perm. Limited
40000494	MCCARTHY, ALMA	3008	3051	3000	3050	09/01/2008	12/31/9999	U6	Rehire	15	Reemployment

**Note:** The report allows you to go directly into the employee's HR Master Data by double-clicking on the employee's record in the report results.

# Viewing Results: Movement – Turnover Report

The screenshot shows a software interface with a menu bar (List, Edit, Goto, Views, Settings, System, Help) and a toolbar with various icons. The main title is "Movement / Turnover Report". Below the title, there's a toolbar with icons for search, print, and other report functions. The main content area displays the "State of Washington Movement/Turnover Report". It includes program details: Program: ZHR\_RPTPYU26, User: JANETP, and Run Date: 05/12/2009. A table lists job class movements:

Job Class	Job Class Short Text	Job Class Long Text	Old Job Class	Old Job Class Short	Old Job Class Long T
50000274	100J	OFF ASST 3			
50003923	WMS03	WMS BAND 3	50003923	WMS03	WMS BAND 3
50001206	389A	PARK RANGER 1			
50001362	429C	AGO INVESTIGATOR/ANALYST			
50002552	530P	TRANSPORTATION TECHNICAL ENGINEER 5	50002552	530P	TRANSPORTATION TECHNICAL ENGINEER 5
50000902	286B	LPN 2	50002065	286E	PSYCHIATRIC SECURITY NURSE

# **HRMS**

# **Activity**



**Movement Turnover Report –**  
**ZHR\_RPTPYU26**

# **Summary**

- **Throughout the course, you have learned to:**
  - Understand Personnel Administration Activities.
  - Hire and rehire an employee.
  - Display and change employee information.
  - Process an Employee Appointment Change.
  - Process a Leave of Absence.
  - Perform an Employee Separation.
  - Access Personnel Reports.
  - Access procedures in the OLQR.

# Helpful Hints

The following section is used to provide users additional system features in HRMS.

- Personnel Number Search by Social Security Number
- Infotype Messages
- Affirmative Action (state and federal) reporting requirements
- ‘3 ways’ of selecting an infotype



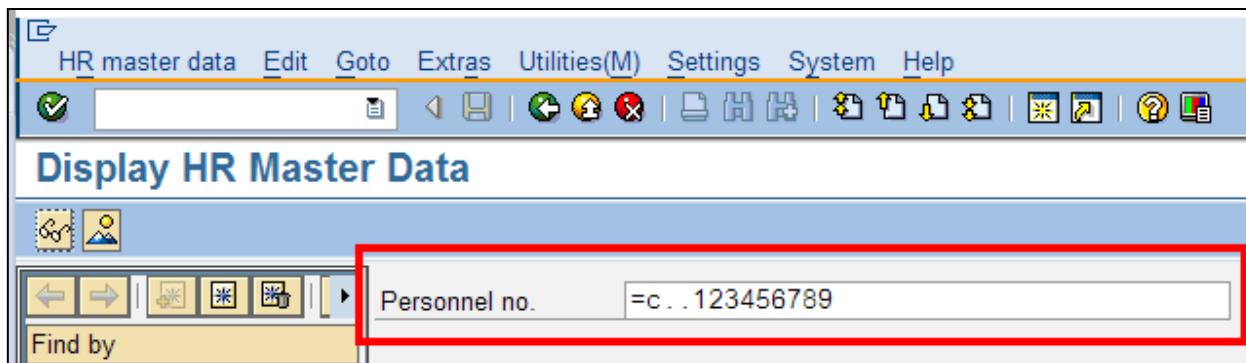
# Personnel Number Search

If you do not know the employee's personnel number, you can search for the specific employee by using their social security number or the person's name if you have that readily available to you.

## Search by Social Security Number

- In the **Personnel no.** field type “=c..” and the Social Security number with no dashes.

For example, you know the SSN is 123-45-6836. In the **Personnel no.** field type =c..123456836 and click  (Display) or  (Enter) to view the employee's record. The employee data displays.



# Infotype Messages

- Informational notes known as Maintain Text can be added to certain infotypes.
- The text can be edited and deleted by any user who has create/change access to the infotype.
- Infotypes are limited to one message, however several comments may be added to that message.
- Not all infotypes allow text to be created.
- The following infotypes have Maintain Text capabilities:
  - ◆ *Org Assignment* (0001)
  - ◆ *Basic Pay* (0008)
  - ◆ *Recurring Payments & Deductions* (0014)
  - ◆ *Withholding Info* (0210)
  - ◆ *Health Plans* (0167)
  - ◆ *Miscellaneous Plans* (0377)
  - ◆ *Planned Working Time* (0007)
  - ◆ *Contract Elements* (0016)
  - ◆ *Additional Payments* (0015)
  - ◆ *Additional Info* (0234)
  - ◆ *Savings Plans* (0169)
  - ◆ *General Benefits* (0171)
  - ◆ *Actions* (0000)

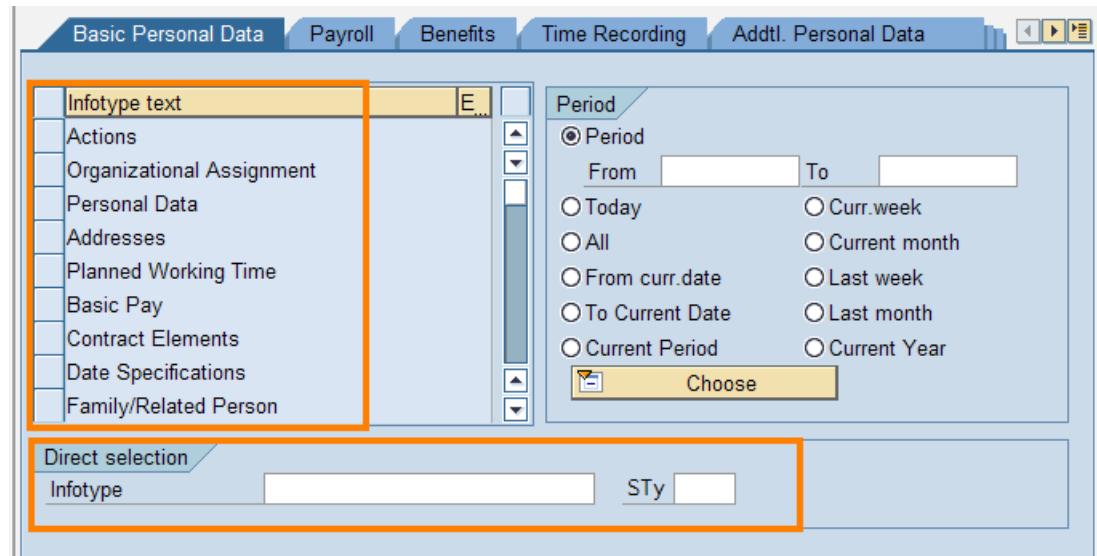
# Additional Personal Data (0077)

- **HRMS Communication Message:** To improve agency workforce data used for affirmative action (state and federal) reporting requirements, and HRM diversity profile reports, the *Additional Personal Data Infotype 0077* data fields in HRMS should reflect a populated value.
- The fields on *Infotype 0077* for *Race Category*, *Ethnicity(New)*, *Ethnic Origin*, and *Disability* are fields used for AA/EEO and diversity workforce data reports.
- If these fields are not populated, the consequence will be employees are not counted in the AA or diversity reports, or not counted correctly
- Please use the *Coding Guideline* worksheet (tab) on the [AA\\_EEO\\_Coding\\_Guideline\\_and\\_IT0077\\_Data.xls](#) spreadsheet located in the HRMS Support Message Center dated 09/09/2008.

# '3 ways' of selecting An Infotype

- There are three ways to select an infotype:

1. Click on the selection box next to the infotype name.
2. Type the name or number associated with the infotype in the **Infotype** field.
3. Click on the matchcode button in the **Infotype** field.



# Other OLQR User Procedures

- Here is a list of other OLQR User Procedures that have not been mentioned in the course:

- [Addresses](#)
- [Assign Badge Number](#)
- [Basic Pay – Change Pay Scale to Pay Band \(Salary\)](#)
- [Maintain Name Change](#)
- Military Service – Create
- Military Service – Maintain
- Monitoring of Tasks – Create and Maintain



# **Additional Personnel Administration Scenarios**

# **Additional Personnel Administration Scenarios**

- Scenario 1: Create Objects on Loan (0040)
- Scenario 2: Create Other/Previous Employers (0023)
- Scenario 3: Create Communication (0105)
- Scenario 4: Create Family Member/Dependents (0021)
- Scenario 5: Supersede Appointments
- Scenario 6: Maintain Date Specification (0041)
- Scenario 7: Maintain Basic Pay (0008)
- Scenario 8: Change Employee Sub-Group
- Scenario 9: Create Assignment Pay
- Scenario 10: Maintain Social Security Number
- Scenario 11: Maintain Employee Percent
- Scenario 12: Create Next Increase Date (PID)
- Scenario 13: Change Entry/Leaving Date
- Scenario 14: Process Concurrent Employment
- Scenario 15: Manage Work Schedules
- Scenario 16: In-training/Under-fill

# Scenario 1: *Objects on Loan (0040)*

- The Objects on Loan infotype (0040) records property of the State that is loaned to an employee for business purposes.
- Fields to complete:
  - Start
    - (Date of Issue)
  - To
    - (End date – 12/31/9999)
  - Object on loan
    - Laptop
  - Loan Object number
    - Serial/assigned number
- When finished, click (**Enter**) and then click (**Save**).

The screenshot shows the SAP Infotype creation interface for '0040 Objects on Loan'. The top menu bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main title is 'Create Objects on Loan (0040)'. The form contains several fields:

- Personnel No.: 40000050
- Name: COOL JOE
- PersArea: 1000 (Attorney General)
- EEGroup: 0 (Permanent)
- PSubarea: 0001 (Non Represented)
- EESubgroup: 01 (Monthly(M) OT Exempt)
- Status: Active
- Start (date field) and to (date field) are highlighted with a red box.
- Object on loan (checkbox): checked
- Number/unit (text field): empty
- Loan object no. (text field): empty
- Comments section with three lines for input: Line 1, Line 2, Line 3.

To 'create' or 'maintain' this infotype, use transaction code **PA30**.

# Scenario 2: *Previous Employers* (0023)

- The Other/Previous Employers infotype (0023) records past employment history.

- Fields to complete:

- Start**
  - Beginning Date
- To**
  - End Date
- Employer**
- City**
- Job**
  - Type of Industry

SAP Infotype 0023 'Create Other/Previous Employers' screen. The Start and To date fields are highlighted with a red box. Below them is a section labeled 'Other/previous employers' with fields for Employer, City, and Job.

Personnel No.	40000050	Name	COOL JOE
PersArea	1000	Attorney General	EEGroup 0 Permanent
PSubarea	0001	Non Represented	EESubgroup 01 Monthly(M) OT Exempt Status Active
Start	<input checked="" type="checkbox"/>	to	<input checked="" type="checkbox"/>
Other/previous employers			
Employer			
City			
Job			

- When finished, click (**Enter**) and then click (**Save**).

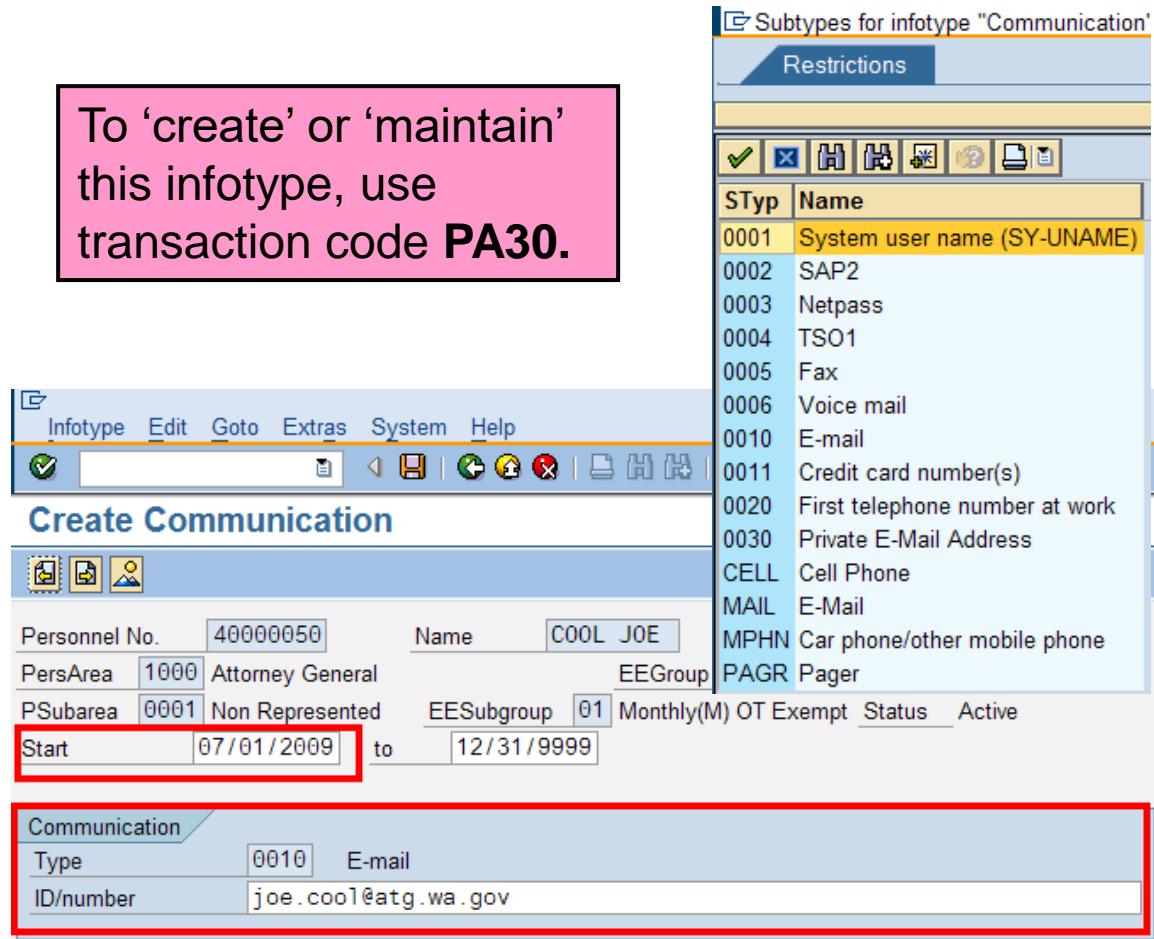
To 'create' or 'maintain' this infotype, use transaction code **PA30**.

# Scenario 3: *Communication (0105)*

- The *Communication* (0105) records the employee's email address.

To 'create' or 'maintain' this infotype, use transaction code **PA30**.

- Fields to complete:
  - **Select Subtype**
    - 0010 – E-mail
  - **Start**
    - Beginning Date of record
  - **ID/number**
    - Email Address
- When finished, click  (Enter) and then click  (Save).



The screenshot shows the SAP PA30 transaction interface for creating a communication record. At the top right is a list of subtypes for infotype "Communication". The subtype **0010 - E-mail** is selected. The main window is titled "Create Communication" and contains fields for Personnel No (40000050), Name (COOL JOE), PersArea (1000 - Attorney General), PSubarea (0001 - Non Represented), EEGroup (01), Start date (07/01/2009), End date (12/31/9999), and EESubgroup (01). Below this, a summary table shows the communication details: Type (0010 - E-mail) and ID/number (joe.cool@atg.wa.gov). The entire "Create Communication" section is highlighted with a red border.

# Scenario 4: *Family Member/Dependents* (0021)

- The *Family Member/Dependents* infotype (0021) records employee's emergency contact.
- Fields to complete:
  - Select Subtype
    - 1 Spouse
  - Start
  - First/Last Name
  - Birth date
  - Telephone number
  - Address Info.

Personnel No.	40000050	Name	COOL JOE
PersArea	1000	Attorney General	EEGroup <input type="checkbox"/> Permanent
PSubarea	0001	Non Represented	EESubgroup <input type="checkbox"/> 01 Monthly(M) OT Exempt Status Active
Start	<input checked="" type="checkbox"/>	To	12/31/9999
Member	1 Spouse	Number	
<b>Personal data</b>			
Last name	COOL	Birth name	
First name	<input checked="" type="checkbox"/>	Ref.Pers.No.	
Gender	<input type="radio"/> Female <input checked="" type="radio"/> Male	Telephone number	
Birth date	<input checked="" type="checkbox"/>	Separation Date	
SSN		Marital status	
Street			
Addr Line 2			
City/State			
Zip/country			
<b>Physician</b>		<b>Challenge</b>	<b>Status</b>
Physician1		<input type="checkbox"/> Disability	<input type="checkbox"/> Medicare
ID Number		Disability Date	<input type="checkbox"/> Smoker
Physician2		Learned	<input type="checkbox"/> Military Service
ID Number			<input type="checkbox"/> Fin. Indep.

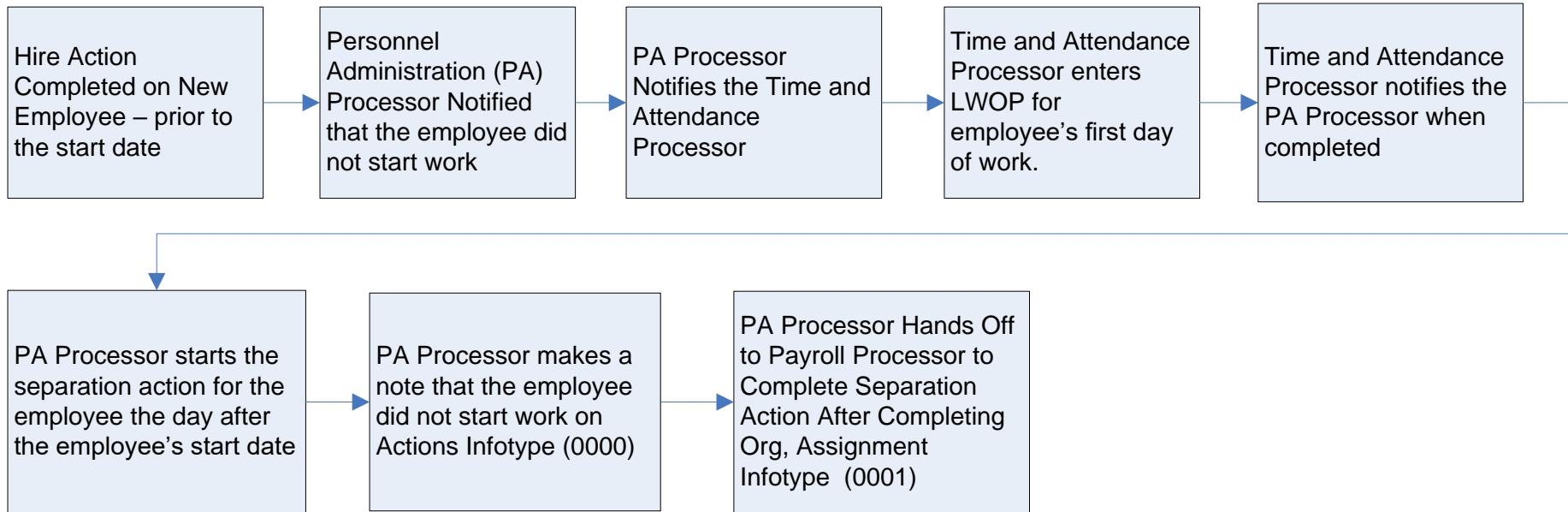
- When finished, click  (**Enter**) and then click  (**Save**).

# **Scenario 5: Supersede Appointments**

- To Supersede a New Hire or Re-Hire action for an employee who was entered into HRMS and has not started work, but payroll has processed follow the OLQR User Procedure:
  - **Supersede New Hire or Rehire Action\_Employee Not Paid**
    - In order for the action to be superseded, the Time and Attendance Processor must enter the employee's first day as Leave without Pay. Once completed, a separation action can be done on the following day with a note on the *Actions* (0000) stating the employee did not start work.
- To Supersede a New Hire action for an employee who was entered into HRMS and payroll has not been processed, contact the DOP Service Center at [HelpDesk@dop.wa.gov](mailto:HelpDesk@dop.wa.gov) or 360-664-6400 to request the personnel number to be deleted.
- If the action performed is for an Appointment Change, the gaining agency would delete the action and contact the losing agency.

# Supersede New Hire or Rehire Appointment

Review the *Supersede New Hire or Rehire Action Employee Not Paid* procedure when a New Hire action was completed on an employee who was entered into HRMS but never started work.



[Supersede New Hire or Rehire Action Employee Not Paid](#)

# Scenario 6: Maintain Date Specifications

- To adjust dates in the *Date Specifications* (0041) follow the OLQR User Procedure, [Date Specifications – Maintain](#).
- For rules about adjusting Date Specifications, refer to:
  - [\*\*WAC 357-31-345\*\*](#)
  - [\*\*WAC 357-46-055\*\*](#)
  - Agency bargaining agreements
  - Agency Policy

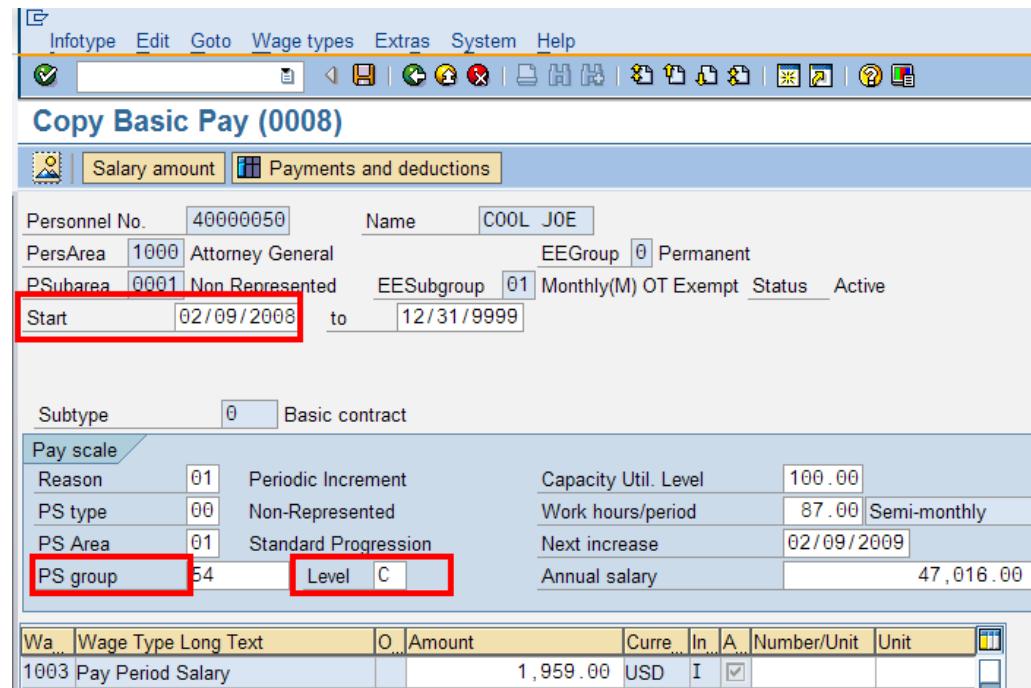
The screenshot shows the SAP Infotype maintenance interface for transaction code PA30. The title bar reads "Copy Date Specifications (0041)". The header contains personnel information: Personnel No. 40000050, Name COOL JOE, PersArea 1000 (Attorney General), PSubarea 0001 (Non Represented), EEGroup 0 (Permanent), EESubgroup 01, Monthly(M) OT Exempt, Status Active. The "Start" date field is highlighted with a red box and contains the value 11/01/2007. Below the header is a table titled "Date Specifications" with two columns of date types and their corresponding dates:

Date type	Date	Date type	Date
01 Anniversary Date	08/09/2005	02 Appointment Date	11/01/2007
03 Original Hire Date	11/01/2007	05 Seniority Date	08/09/2005
07 Unbroken Srvc. Date	08/09/2005	18 Prsnl HolidayElgblty	03/16/2006

To ‘maintain’ this infotype, use transaction code **PA30**.

# Scenario 7: Maintain *Basic Pay* (0008)

- When updating the employee's salary information on Basic Pay (0008), consider whether they are a General Government vs. WMS employee.
- Fields to complete for a General Government employee:
  - Start**
    - Beginning date of record
  - Reason**
  - PS Level**
    - Step
- When finished, click  (**Enter**) and then click  (**Save**).



The screenshot shows the SAP Infotype maintenance interface for 'Copy Basic Pay (0008)'. The 'Salary amount' tab is selected. Key fields visible include:

- Personnel No.: 40000050
- Name: COOL JOE
- PersArea: 1000 Attorney General
- EEGroup: 0 Permanent
- PSubarea: 0001 Non Represented
- EESubgroup: 01 Monthly(M) OT Exempt Status: Active
- Start: 02/09/2008 (highlighted with a red box)
- to: 12/31/9999
- Subtype: 0 Basic contract
- Pay scale:
  - Reason: 01 Periodic Increment
  - PS type: 00 Non-Represented
  - PS Area: 01 Standard Progression
  - PS group: 54 (highlighted with a red box)
  - Level: C (highlighted with a red box)
  - Capacity Util. Level: 100.00
  - Work hours/period: 87.00 Semi-monthly
  - Next increase: 02/09/2009
  - Annual salary: 47,016.00
- Wage Type Long Text: 1003 Pay Period Salary
- Amount: 1,959.00
- Currency: USD
- In: I
- Number/Unit: A
- Unit: (checkbox checked)

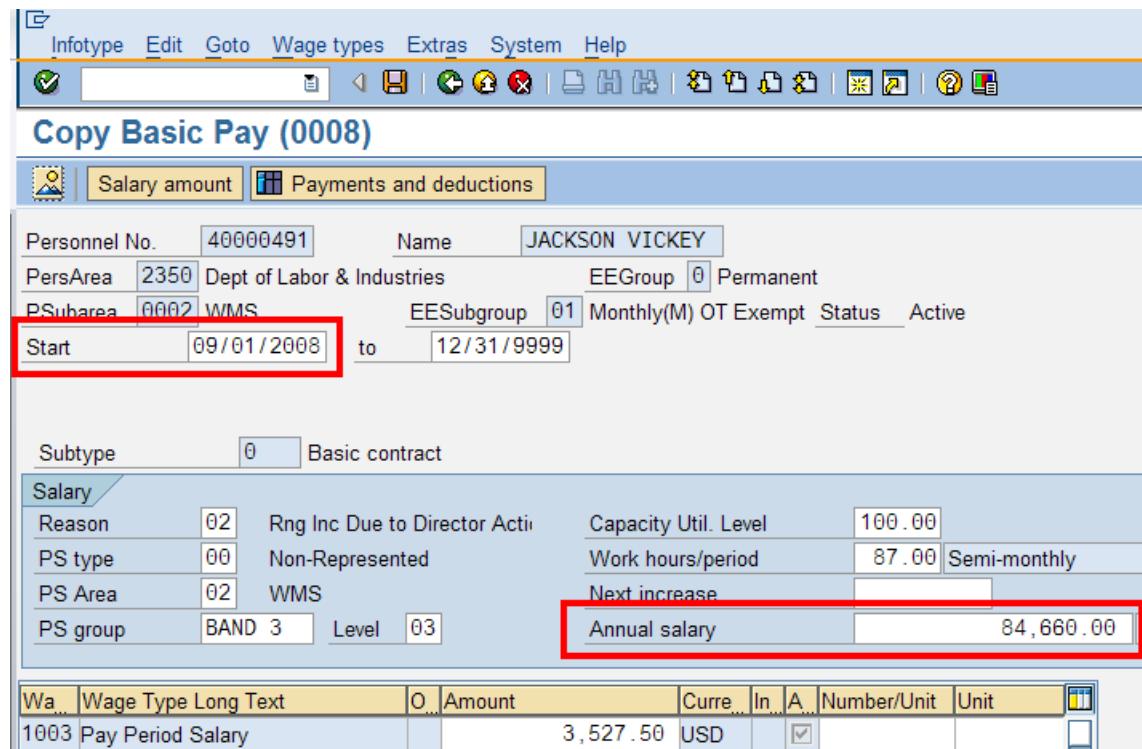
Always use the “Create” function to ‘maintain’ this infotype.

# Scenario 7: Maintain *Basic Pay (0008)* – cont'd

- Fields to complete for a WMS employee:

- Start
  - Beginning date of record
- Reason
- Annual Salary

- When finished, click  (**Enter**) and then click  (**Save**).



The screenshot shows the SAP Infotype maintenance interface for 'Copy Basic Pay (0008)'. The personnel number is 40000491, name is JACKSON VICKEY, and the department is Dept of Labor & Industries. The PS Subarea is WMS. The salary contract starts on 09/01/2008 and ends on 12/31/9999. The subtype is 'Basic contract'. The reason for the wage type is 'Rng Inc Due to Director Acti'. The capacity utilization level is 100.00, and the work hours period is semi-monthly. The annual salary is listed as 84,660.00.

Always use the “Create” function to ‘maintain’ this infotype.

# Scenario 8: Change Employee Sub-Group

- To change the Employee Sub-Group, follow the OLQR User Procedure, [Appointment Change to Change Employee Sub-Group.](#)
  - If the Employee Sub-group is set to Hourly on the position you can change it to Monthly on the employee.
  - If the Employee Sub-group is set to Monthly on the position you can change it to Hourly on the employee.

Employee subgroup (1) 19 Entries found			
Restrictions			
EEGrp	Name of EE gr...	ESg...	Name of EE subgrp
0	Permanent	00	Hourly (H) OT Exempt
0	Permanent	01	Monthly(M) OT Exempt
0	Permanent	02	Daily OT Exempt
0	Permanent	03	H-OT Elig>Daily Sche
0	Permanent	04	M-OT Elig>Daily Sche
0	Permanent	05	H-OT Elig>40hrs/wk
0	Permanent	06	M-OT Elig>40hrs/wk
0	Permanent	09	H-OT Elig Law En>160
0	Permanent	10	M-OT Elig Law En>160
0	Permanent	11	H-OT Elig Law En>171
0	Permanent	12	M-OT Elig Law En>171
0	Permanent	13	H-OT Elig>8hrs/wkday
0	Permanent	14	M-OT Elig>8hrs/wkday
0	Permanent	15	H-OT Elig Nrs>80h/2w
0	Permanent	16	M-OT Elig Nrs>80h/2w
0	Permanent	17	H-OT Elig>Shift
0	Permanent	18	M-OT Elig>Shift
0	Permanent	19	H-OT Elig>Sched WSF
0	Permanent	20	M-OT Elig>Sched WSF

# Scenario 8: Change Employee Sub-Group



- Following your agency's business process, DOP highly recommends PA Processors to contact the Payroll Office prior to initiating the Appointment Change Action for changing an employee's subgroup.
  - Any future time entries made in the Cross-Application Time Sheet (CATS) will need to be removed before the PA Processor can begin the action.
  - If this is not done, the Payroll Office is unable to make any corrections in CATS and the PA Processor will need to delete the action.

# Scenario 9: Assignment Pay

- The *Basic Pay (0008)* also records the employee's Assignment Pay.

- Fields to complete:

- Start
  - Beginning date of record
- Wage Type
  - 1007
- Number/Unit
  - 4.00
- Unit
  - Ranges

- Click (Enter) and then (Save)

SAP HR Software Screenshot - Copy Basic Pay (0008) Screen

Personnel No.: 40000050 Name: COOL JOE  
PersArea: 1000 Attorney General EEGroup: 0 Permanent  
PSubarea: 0001 Non Represented EESubgroup: 01 Monthly(M) OT Exempt Status: Active  
Start: 05/01/2009 to: 12/31/9999

Subtype: 0 Basic contract

Pay scale Reason: 01 Periodic Increment Capacity Util. Level: 100.00  
PS type: 00 Non-Represented Work hours/period: 87.00 Semi-monthly  
PS Area: 01 Standard Progression Next increase: 02/09/2009  
PS group: 54 Level: C Annual salary: 47,016.00 USD

Wa...	Wage Type Long Text	O...	Amount	Curre...	In...	A...	Number/Unit	Unit
1003	Pay Period Salary		1,959.00	USD	I	<input checked="" type="checkbox"/>		
1007	Assignment Pay by Range		202.00	USD	I	<input checked="" type="checkbox"/>	4.00	Ranges
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		

IV 05/12/2009 - 12/31/9999 2,161.00 USD

# Scenario 9: Assignment Pay – cont'd

- Assignment pay is granted in recognition of assigned duties that exceed ordinary duties.
- Assignment pay is based on salary ranges and not percentages.
- See OLQR Procedures, [Assignment Pay Based on Pay Scale Group – Basic Pay](#), and [Assignment Pay – Range-based](#).

For a list of approved job classes and pay premium for assignment pay, consult the Department of Personnel Compensation Plan and Collective Bargaining Agreements.

# **HRMS**

# **Activity**



**Create Range-based Assignment Pay –  
Exercise - Pg. 52**

# Scenario 10: Maintain Social Security Number

- Update *Personal Data* (0002) to change the employee's Social Security Number.
- Fields to complete:
  - Start
    - Beginning date of the new record
  - SSN
    - Social Security Number
- When finished, click (**Enter**) and then click (**Save**).

The screenshot shows the SAP Infotype 0002 'Copy Personal Data' screen. The top navigation bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the title 'Copy Personal Data (0002)' are several input fields:

- Personnel No.: 40000050
- Name: COOL JOE
- PersArea: 1000 (Attorney General)
- EEGroup: 0 (Permanent)
- PSubarea: 0001 (Non Represented)
- EESubgroup: 01 (Monthly(M) OT Exempt Status Active)
- Start: 05/01/2009 (highlighted with a red box)
- To: 12/31/9999

Below these are sections for Name, Title, Last name (COOL), First name (JOE), Middle name, Suffix, and Nickname. A 'HR data' section contains:

- SSN: 500-10-1059 (highlighted with a red box)
- Date of Birth: 07/04/1971
- Gender: Radio buttons for Female (selected) and Male
- Marital Status: Single
- Since: [empty field]

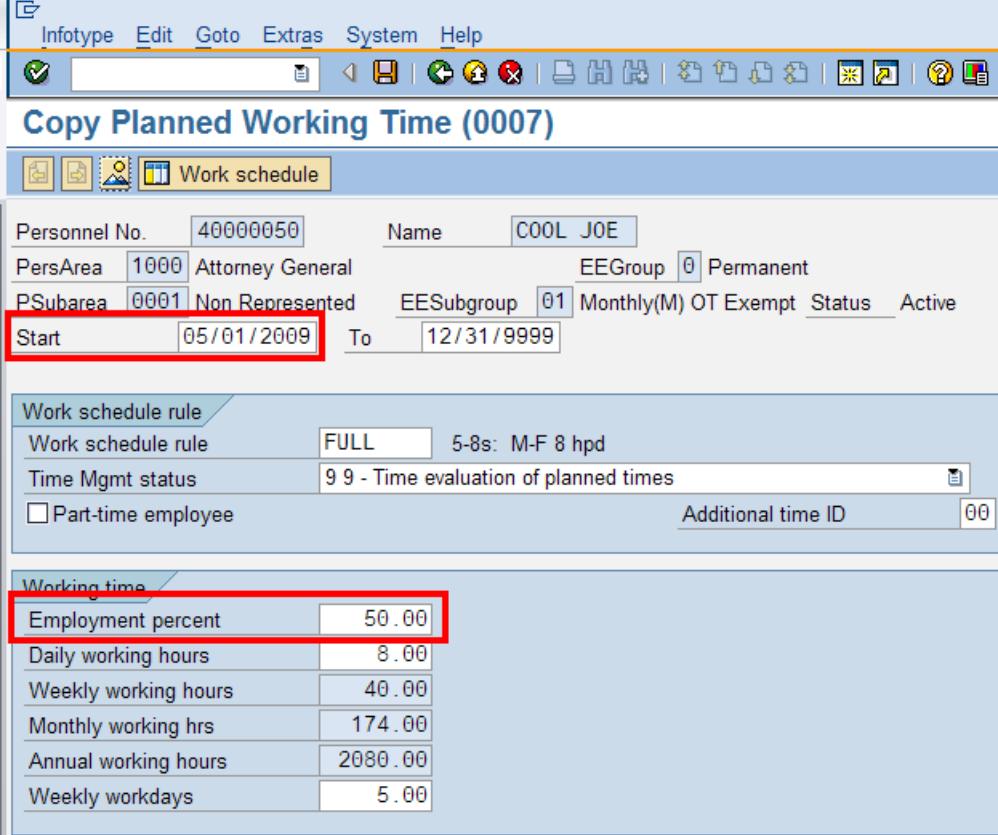
To 'maintain' this infotype, use transaction code **PA30**.

# Scenario 11: Maintain Employment Percent

- To change the Employment Percent, update the *Planned Working Time* infotype (0007) and the *Basic Pay infotype* (0008).

- Fields to complete in Planned Working Time:

- Start
  - Beginning date of record
- Employment percent
  - 50.00
- When finished, click  (**Enter**) and then click  (**Save**).



The screenshot shows the SAP transaction PA30 interface for maintaining employment percent. The title bar reads "Copy Planned Working Time (0007)". The main area displays personnel information: Personnel No. 40000050, Name COOL JOE, PersArea 1000 (Attorney General), PSubarea 0001 (Non Represented), EEGroup 0 (Permanent), EESubgroup 01 (Monthly(M) OT Exempt), Status Active. The "Start" field is set to 05/01/2009 and the "To" field is set to 12/31/9999. In the "Work schedule rule" section, the rule is set to FULL (5-8s: M-F 8 hpd). Under "Working time", the "Employment percent" field is highlighted with a red box and contains the value 50.00. Other working time fields include Daily working hours (8.00), Weekly working hours (40.00), Monthly working hrs (174.00), Annual working hours (2080.00), and Weekly workdays (5.00).

To 'maintain' this infotype, use transaction code **PA30**. The percent in the *Planned Working Time* (0007) must match the *Basic Pay* (0008).

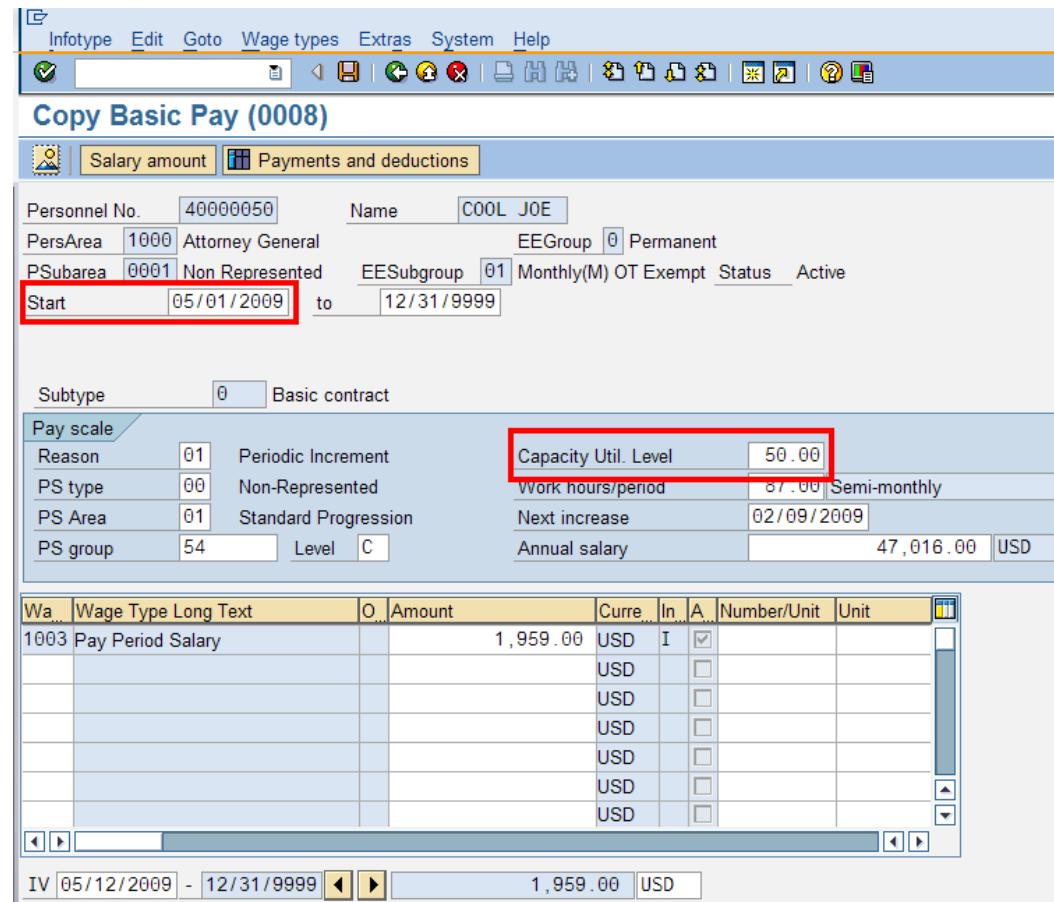
# Scenario 11: Maintain Employment Percent – cont'd

- After updating *Planned Working Time* (0007), update *Basic Pay* infotype (0008).

- Fields to complete in *Basic Pay* (0008):

- **Start**
  - Beginning date of record
- **Capacity util. level**
  - 50.00

- When finished, click  (**Enter**) and then click  (**Save**).



The screenshot shows the SAP Fiori interface for maintaining an infotype. The title bar says "Copy Basic Pay (0008)". The top navigation bar includes "Infotype", "Edit", "Goto", "Wage types", "Extras", "System", and "Help". Below the navigation is a toolbar with various icons. The main form has tabs "Salary amount" and "Payments and deductions".  
**Personnel No.**: 40000050, **Name**: COOL JOE  
**PersArea**: 1000, **Attorney General**:  
**PSubarea**: 0001, **Non Represented**:  
**EEGroup**: 0 Permanent, **EESubgroup**: 01 Monthly(M) OT Exempt, **Status**: Active  
**Start**: 05/01/2009, **to**: 12/31/9999  
  
Subtype: 0 Basic contract  
**Pay scale**  
**Reason**: 01 Periodic Increment, **Capacity Util. Level**: 50.00 (highlighted)  
**PS type**: 00 Non-Represented, **Work hours/period**: 07.00, **Semi-monthly**  
**PS Area**: 01 Standard Progression, **Next increase**: 02/09/2009  
**PS group**: 54, **Level**: C, **Annual salary**: 47,016.00, **USD**  
  

Wa	Wage Type Long Text	O	Amount	Curre	In	A	Number/Unit	Unit
1003	Pay Period Salary		1,959.00	USD	I	<input checked="" type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		

IV 05/12/2009 - 12/31/9999 **1,959.00 USD**

To 'maintain' this infotype, use transaction code **PA30**.

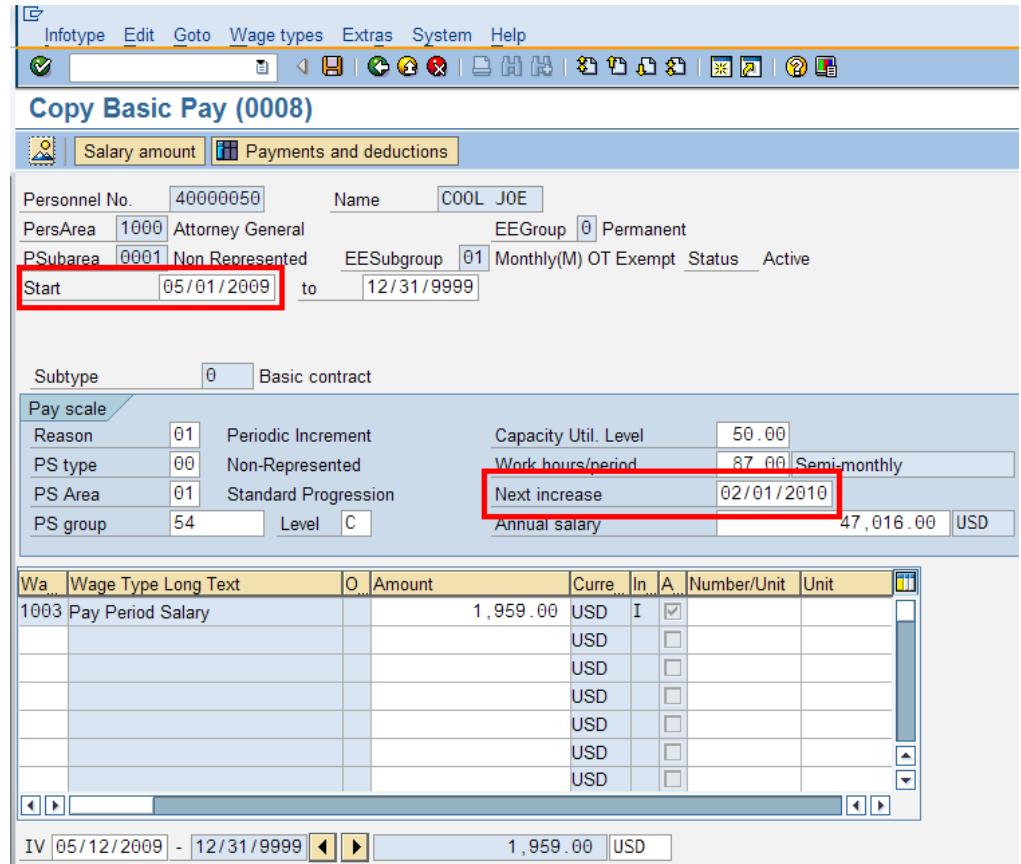
# Scenario 12: Create Next Increase Date

- To create the Next Increase Date (PID), update the *Basic Pay* (0008).

- Fields to complete:

- **Next increase**
    - 02/01/2010

- When finished, click  (**Enter**) and then click  (**Save**).



The screenshot shows the SAP Infotype Copy Basic Pay (0008) screen. The personnel number is 40000050, name is COOL JOE, and the start date is 05/01/2009. The next increase date is highlighted with a red box and set to 02/01/2010. The wage type table shows a single entry for Pay Period Salary with an amount of 1,959.00 USD.

Wa	Wage Type Long Text	O	Amount	Curre	In	A	Number/Unit	Unit
1003	Pay Period Salary		1,959.00	USD	I	<input checked="" type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		

To ‘maintain’ this infotype, use transaction code **PA30**.

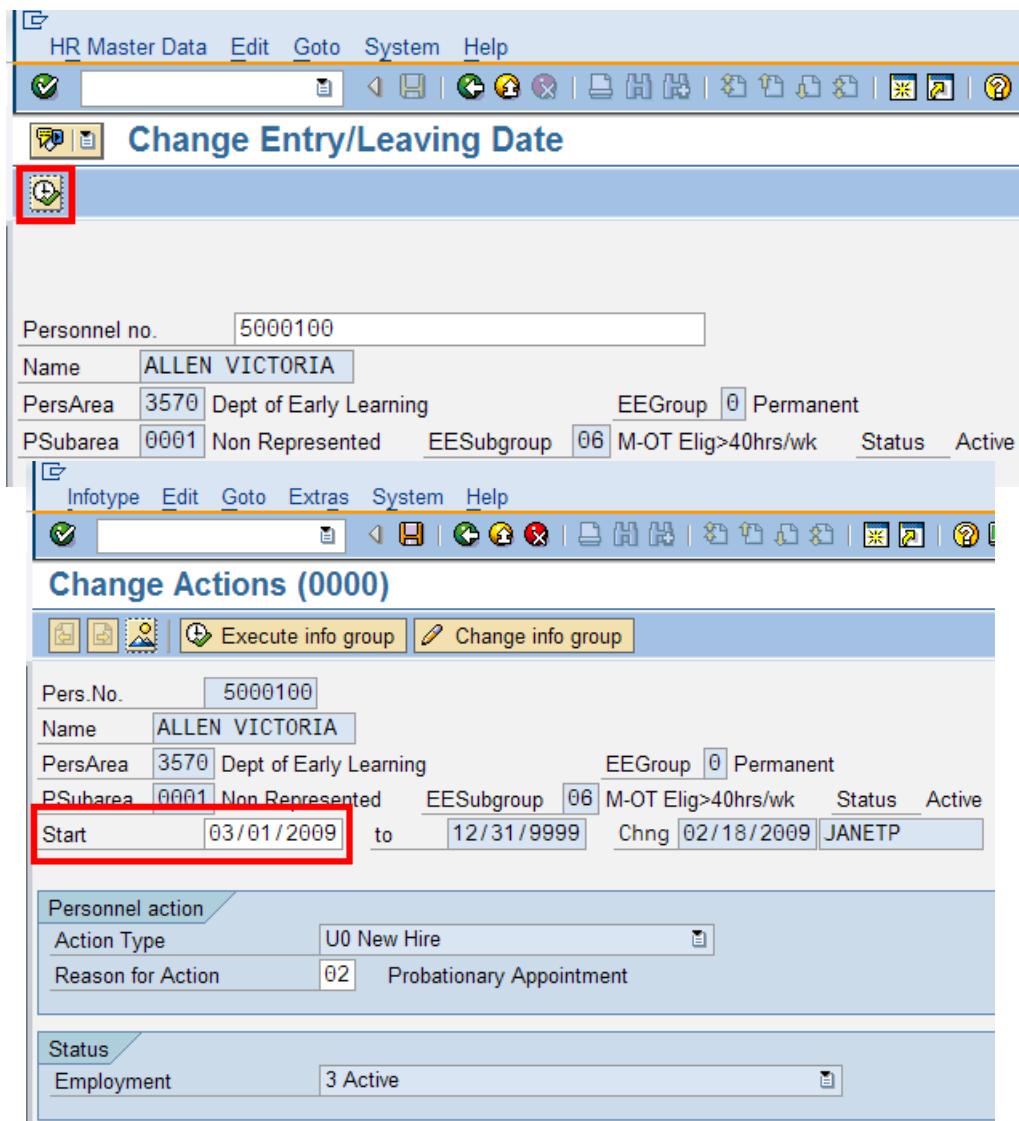
# **Scenario 12: Create Next Increase Date – cont'd**

- The Next Increase Date is run by a batch process.
  - If the employee's next increase date falls on the 1st through the 15th, it will be processed on the night of DAY 1 Payroll Processing for the 25th payroll.
  - If the employee's next increase date falls on the 16th through the 31st, it will be processed on the night of DAY 1 Payroll Processing for the 10th payroll.
- After the Next Increase has been processed, the field will be blank and will need to be reset for the employee's next increase (if needed).



# Scenario 13: Change Entry/Leaving Date – New Hire

- To change the employee's start date after the hire action has been completed **AND** payroll has not been processed, use the Change Entry/Leaving Date transaction **PA41**.
- From the Change Entry/Leaving Date screen, click  (**Execute**).
- Enter new date in **Start** field, click  (**Enter**) and then click  (**Save**).



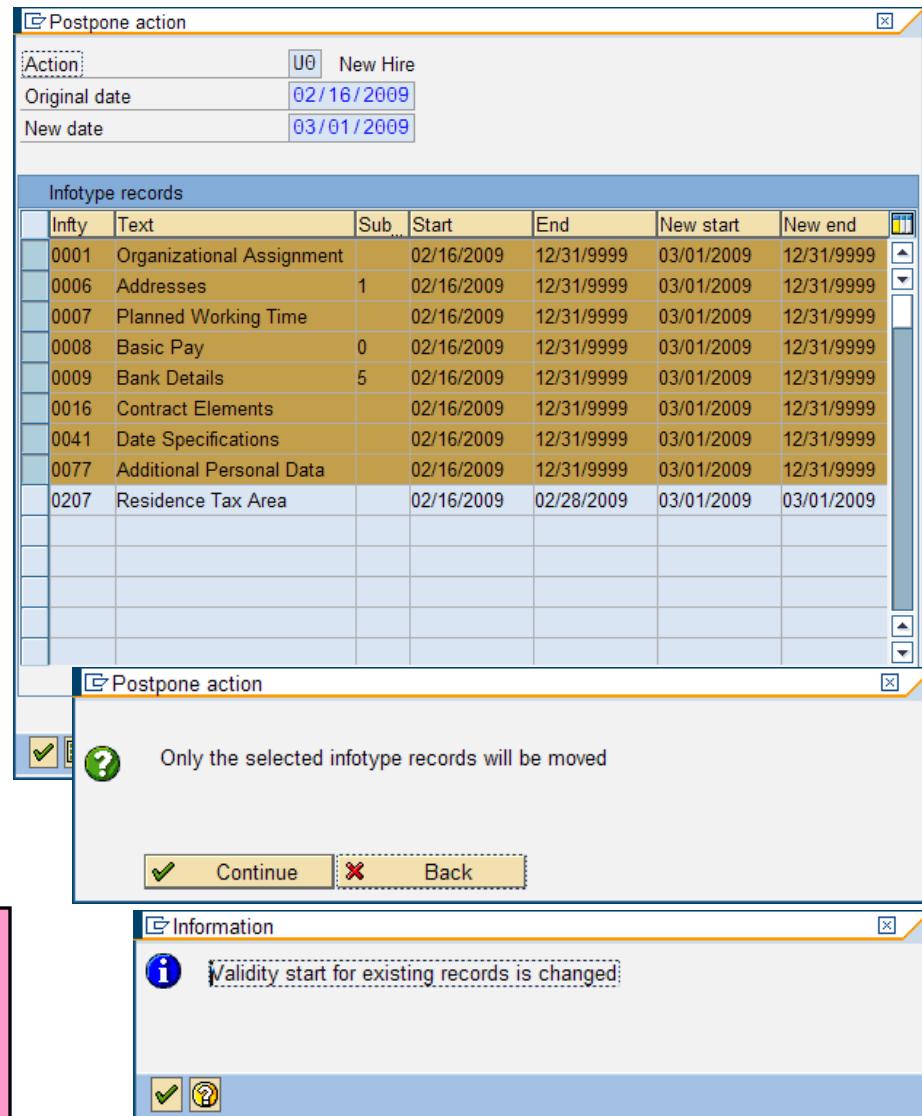
The screenshot shows the SAP HR Master Data interface for the 'Change Entry/Leaving Date' transaction (PA41). The personnel number is 5000100, and the name is ALLEN VICTORIA. The start date is currently set to 03/01/2009, and the end date is 12/31/9999. The personnel action is listed as 'U0 New Hire' with reason '02 Probationary Appointment'. The status is '3 Active'.

Personnel no.	5000100
Name	ALLEN VICTORIA
PersArea	3570 Dept of Early Learning
PSubarea	0001 Non Represented
EEGroup	0 Permanent
EESubgroup	06 M-OT Elig>40hrs/wk
Status	Active
Start	03/01/2009
to	12/31/9999
Chng	02/18/2009 JANETP
Action Type	U0 New Hire
Reason for Action	02 Probationary Appointment
Employment	3 Active

# Scenario 13: Change Entry/Leaving Date – New Hire

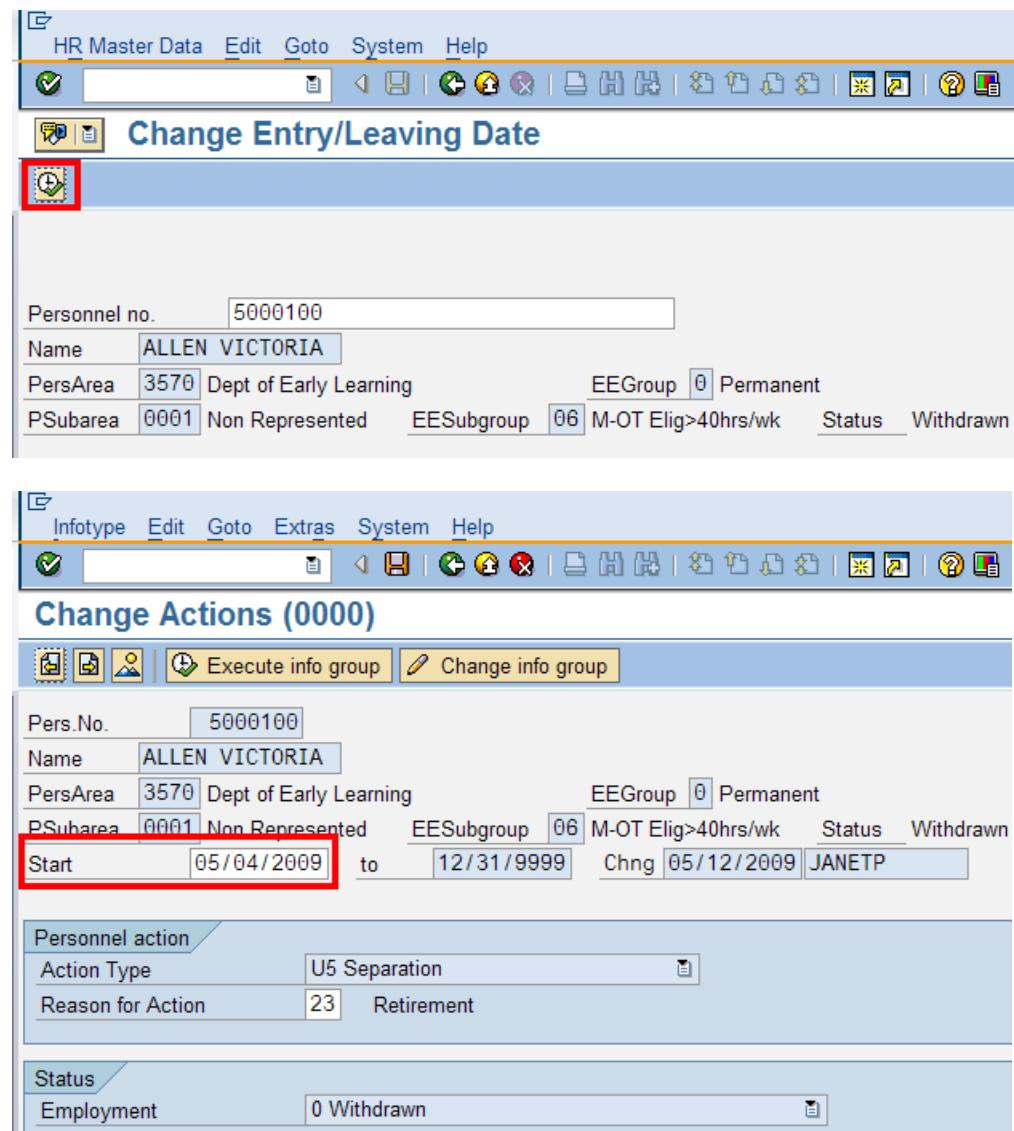
- Select all infotypes that will need to be changed.
- Click (Continue (Enter)).
- Postpone action dialog will appear, click Continue (Continue).
- Information dialog will appear, click (Continue).

See OLQR User Procedure, [New Hire Action – Change Entry Date](#) for more information.



# Scenario 13: Change Entry/Leaving Date – Separation

- To change the employee's leaving date after the separation action has been completed, use the Change Entry/Leaving Date transaction **PA41**.
- Click  (**Execute**).
- Enter new date in **Start** field, click  (**Enter**) and then click  (**Save**).



The figure consists of two screenshots of the SAP HR application interface.

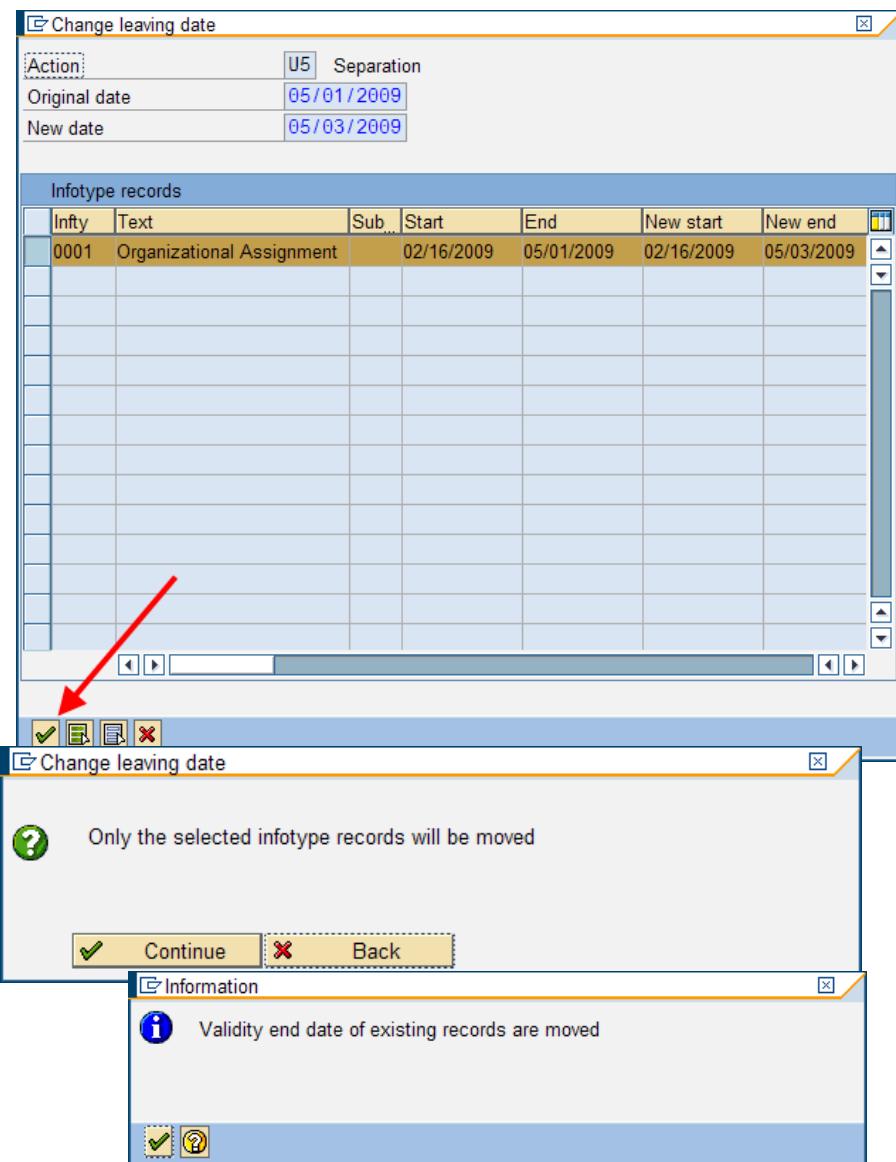
**Top Screenshot:** The title bar reads "HR Master Data" and the sub-title is "Change Entry/Leaving Date". A red box highlights the "Execute" button (a green checkmark icon). The form displays personnel information: Personnel no. 5000100, Name ALLEN VICTORIA, PersArea 3570 Dept of Early Learning, EEGroup 0 Permanent, PSubarea 0001 Non Represented, EESubgroup 06 M-OT Elig>40hrs/wk, and Status Withdrawn.

**Bottom Screenshot:** The title bar reads "InfoType" and the sub-title is "Change Actions (0000)". A red box highlights the "Start" date field, which is currently set to 05/04/2009. The form also shows the "to" date as 12/31/9999, Change date as 05/12/2009, and Change reason as JANETP. Below this, the "Personnel action" section shows Action Type U5 Separation and Reason for Action 23 Retirement. The "Status" section shows Employment status 0 Withdrawn.

# Scenario 13: Change Entry/Leaving Date - Separation

- Select all infotypes that will need to be changed.
- Click **(Continue (Enter))**.
- Postpone action dialog will appear, click **Continue** **(Continue)**.
- Information dialog will appear, click **(Continue)**.

See OLQR User Procedure,  
[Separation Action – Change Leaving Date](#) for more information.

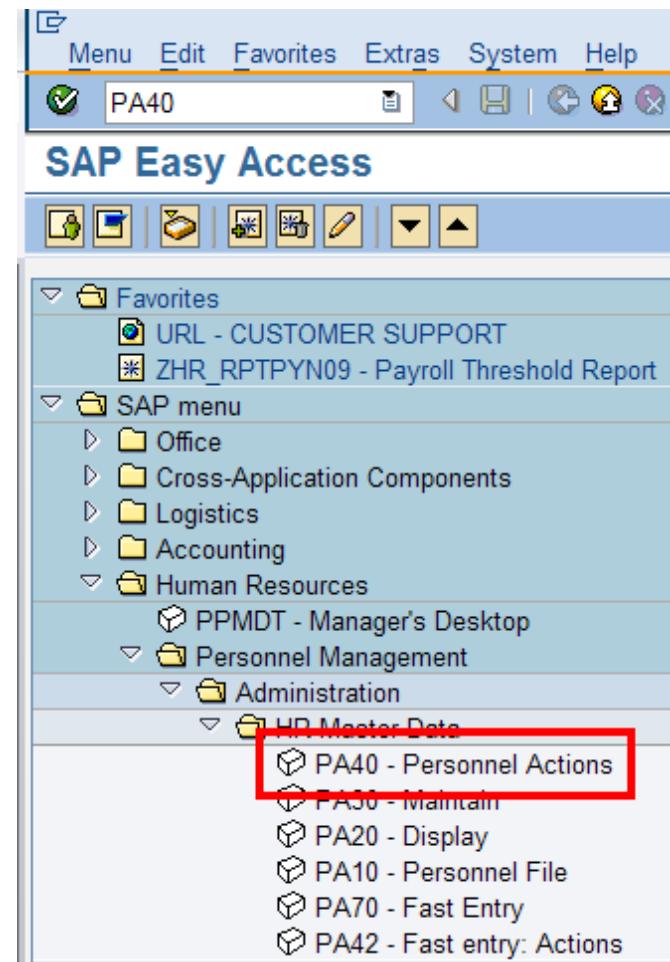


# Scenario 14: Concurrent Employment

- A ***Concurrent Employment*** action is performed when an employee in your personnel area who also works in another personnel area **or** in the same personnel area and the employee works in **two** positions that have different employee subgroups.
- The employee is assigned a Primary Personnel number for one agency and a Reference number for the other.
- Use the OLQR User Procedure, [Concurrent Employment Action](#) for assistance.

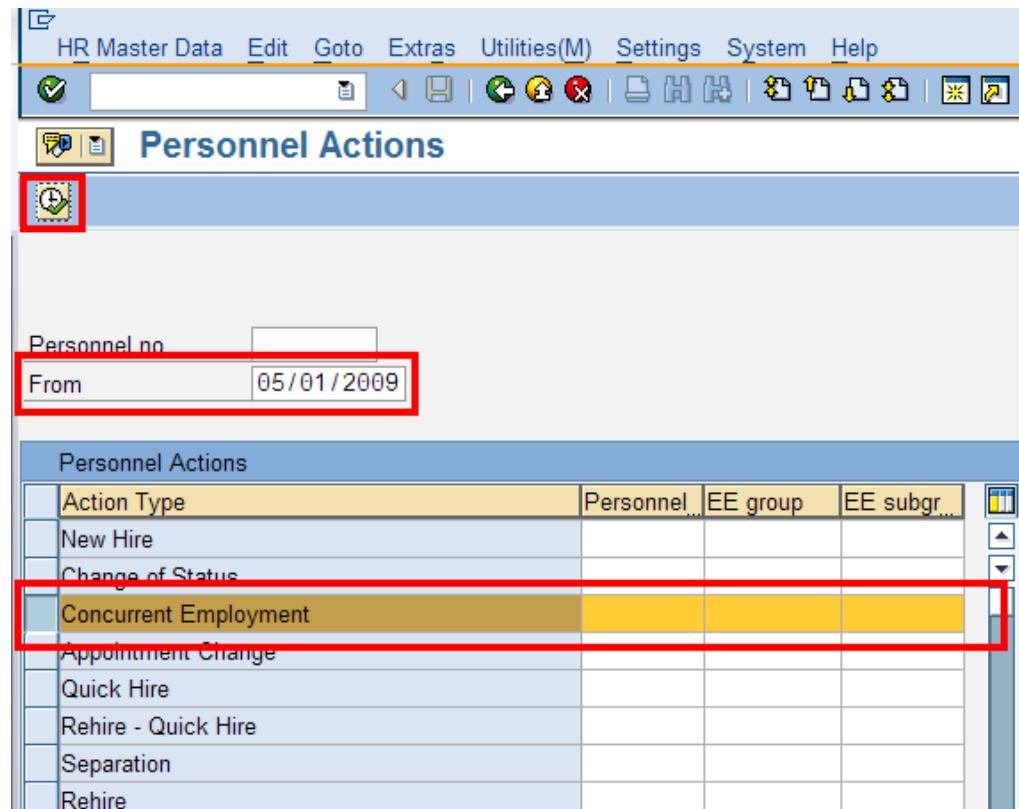
# Create Concurrent Employment Action

- To create a Concurrent Employment Action using the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
  - Or enter transaction code **PA40** in the **Command** field
- Using the action will ensure that all required infotype records are created.



# Accessing the Concurrent Employment Action

- During the *Concurrent Employment* action, the system will assign the employee a new personnel number.
- To access the *Concurrent Employment* action, select the box to the left of *Concurrent Employment*.
- Field to complete:
  - **From** (*Enter the effective date of the action.*)
- Then click  **(Execute)**.



# **Actions (0000)**

■ The Actions infotype records the Concurrent Employment action and assigns another Personnel Number for the employee.

■ Fields to complete:

- **Reason for Action** (use drop down)
- **Reference pers. no.**
  - The personnel number from the employee's existing appointment

– **Position**

■ Click (**Enter**) to validate and populate the following fields:

- Personnel Area
- Employee Group
- Employee Sub-group

The screenshot shows the SAP Fiori interface for creating an action (0000). The top navigation bar includes Infotype, Edit, Goto, Extras, System, and Help. The title is "Create Actions (0000)".  
**Personnel action:**  
Pers. No.: 20000003  
Start: 05/01/2009 to 12/31/9999  
Action Type: UM Concurrent Employment  
Reason for Action: 02 Probationary Appointment  
Reference Pers. Nos.: 40000001 BACHMANN IRENE  
**Status:**  
Employment: 3 Active  
**Organizational assignment:**  
Position: 71000012 FISCAL ANALYST 1  
Personnel area: 3500 Sup of Pub Instruction  
Employee group: 0 Permanent  
Employee subgroup: 06 M-OT Elig>40hrs/wk  
**Additional actions:**  
Start Date, Act., Action Type, ActR, F

■ When finished, click (**Enter**) and then click (**Save**).

# Personnel Administration / Payroll Handoff

- Similar to the Rehire and Appointment Change action, continue through the infotypes.
- The system generates an additional Personnel Number, but the employee cannot be paid yet.
- After all necessary personnel updates are made, the employee information is transferred to the Payroll Processor.
- The Payroll Processor is responsible for completing the following infotypes:
  - *Recurring Payments / Deductions (0014)*
  - *Unemployment State (0209)*
  - *Withholdings Info W4 / W5 US (0210)*
  - *Additional Withholding (0234)*

After saving Basic Pay (0008),  
click  (Exit) to exit the action.



# Scenario 15: Maintain Work Schedules

- **Work schedules** are created during the Hire Action (**PA40**) and maintained in *Planned Working Time infotype* (0007).
- When an employee needs to change their work schedule for a long-term period of time, update the work schedule in the *Planned Working Time* infotype (0007).
  - Example: Employee is currently working M-F 5-8s and now needs work M-Th 4-10s.

The screenshot shows the SAP infotype 0007 interface titled "Copy Planned Working Time (0007)". The top navigation bar includes "Infotype", "Edit", "Goto", "Extras", "System", and "Help". The main area displays the following information:

Personnel No.	400000050	Name	COOL JOE
PersArea	1000	Attorney General	EEGroup <input checked="" type="checkbox"/> Permanent
PSubarea	0001	Non Represented	EESubgroup <input checked="" type="checkbox"/> 01 Monthly(M) OT Exempt
Start	11/01/2007	To	12/31/9999

**Work schedule rule**

Work schedule rule	FULL	5-8s: M-F 8 hpds
Time Mgmt status	9 9 - Time evaluation of planned times	
<input type="checkbox"/> Part-time employee	Additional time ID <input type="text" value="00"/>	

**Working time**

Employment percent	100.00
Daily working hours	8.00
Weekly working hours	40.00
Monthly working hrs	174.00
Annual working hours	2080.00
Weekly workdays	5.00

# Scenario 15: Maintain Work Schedules – cont'd

Change to the Work Schedule:

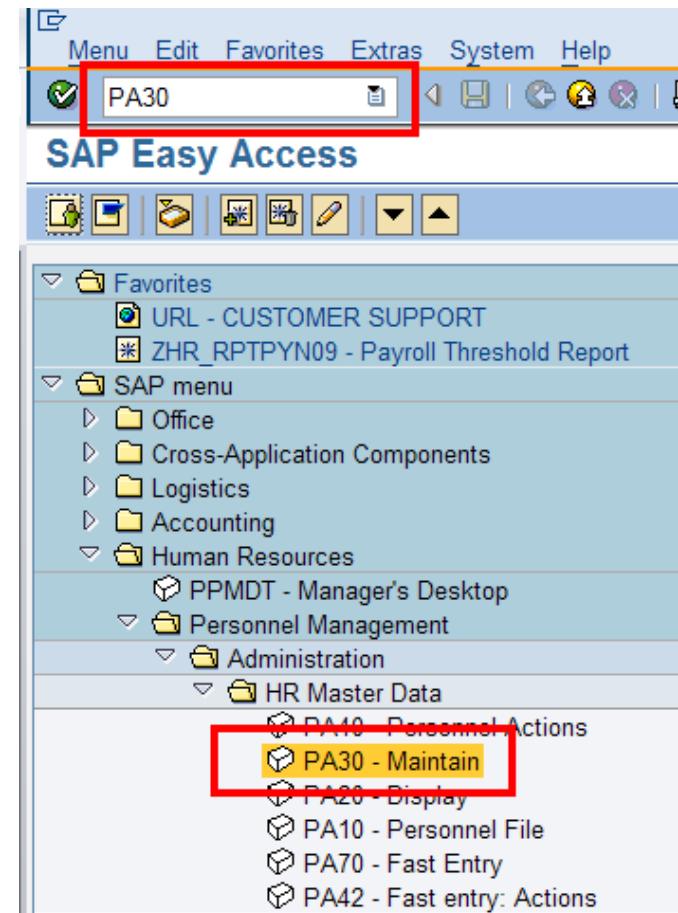
- Short or long-term changes can be made to the work schedule after it has been established.
- The Time and Attendance Processor can make short-term changes to an employee's work schedule using a work schedule substitution. (3 weeks or less)
- Long-term work schedule changes are done by the Personnel Administrator Processor or the Payroll Processor using the *Planned Working Time* (0007). (A month or longer)



# Scenario 15: Maintain Work Schedules – cont'd

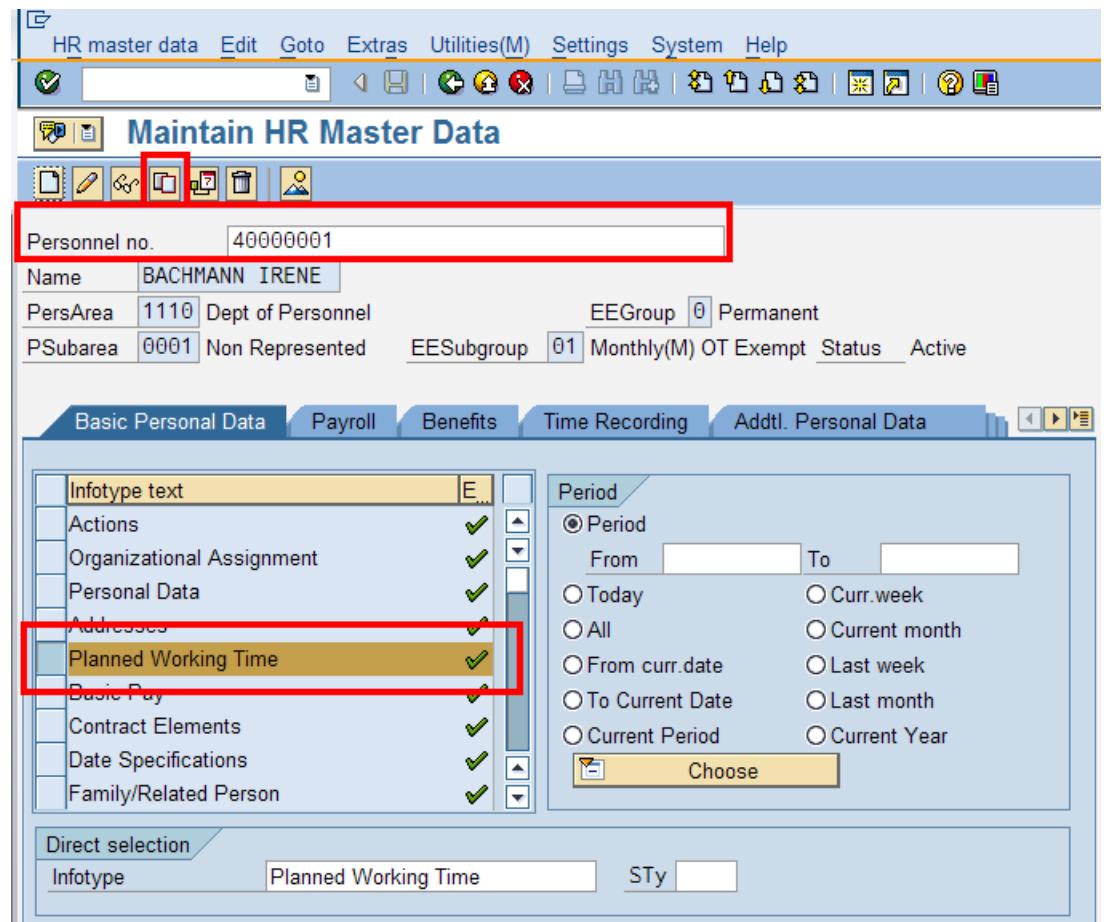
## Long-Term Work Schedule Change:

- To complete a long-term work schedule change, follow menu path:  
Human Resources → Personnel Management → Administration → HR Master Data → Maintain
- Or enter transaction code **PA30** in the **Command** field



# Scenario 15: Maintain Work Schedules – cont'd

- Enter the employee's Personnel no.
- Click (Enter)
- Click the box to the left of *Planned Working Time* infotype (0007).
- Click (Copy)

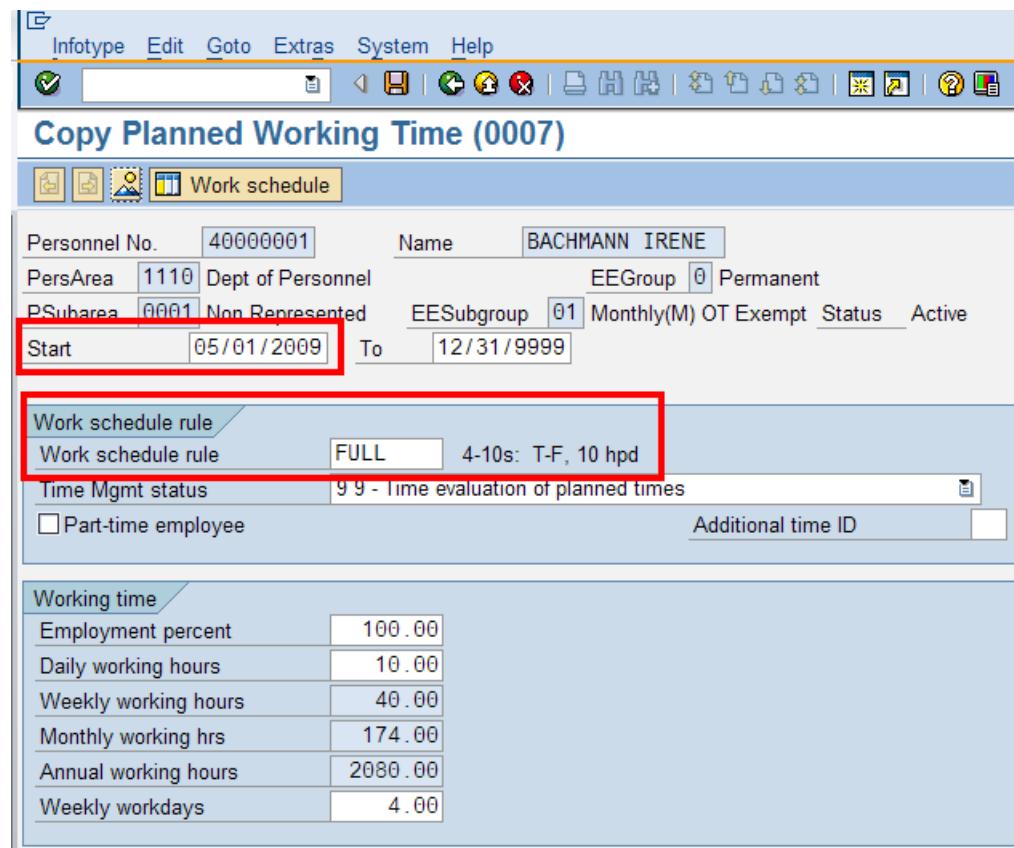


# Scenario 15: Maintain Work Schedules – cont'd

## ■ Fields to complete:

- Start Date
- Work Schedule Rule

## ■ When finished, click (Enter) and then click (Save).



The screenshot shows the SAP Copy Planned Working Time (0007) interface. The personnel details at the top are: Personnel No. 40000001, Name BACHMANN IRENE, PersArea 1110, Dept of Personnel, PSubarea 0001, Non Represented, EEGroup 0 Permanent, EESubgroup 01 Monthly(M) OT Exempt, Status Active. The 'Start' date is highlighted with a red box and set to 05/01/2009. The 'To' date is 12/31/9999. In the 'Work schedule rule' section, the 'Work schedule rule' is set to FULL, with a note 4-10s: T-F, 10 hpd. The 'Time Mgmt status' is 9 9 - Time evaluation of planned times. The 'Working time' section displays employment percent (100.00), daily working hours (10.00), weekly working hours (40.00), monthly working hrs (174.00), annual working hours (2080.00), and weekly workdays (4.00). The 'Part-time employee' checkbox is unchecked.

**Note:** The Employment percent can be maintained at this time, be sure to update *Basic Pay* infotype (0008) if changes are made.

# **HRMS**

# **Activity**



**Maintain Work Schedules –  
Exercise – Pg. 55**

# **Scenario 16: In-training / Under-fill**

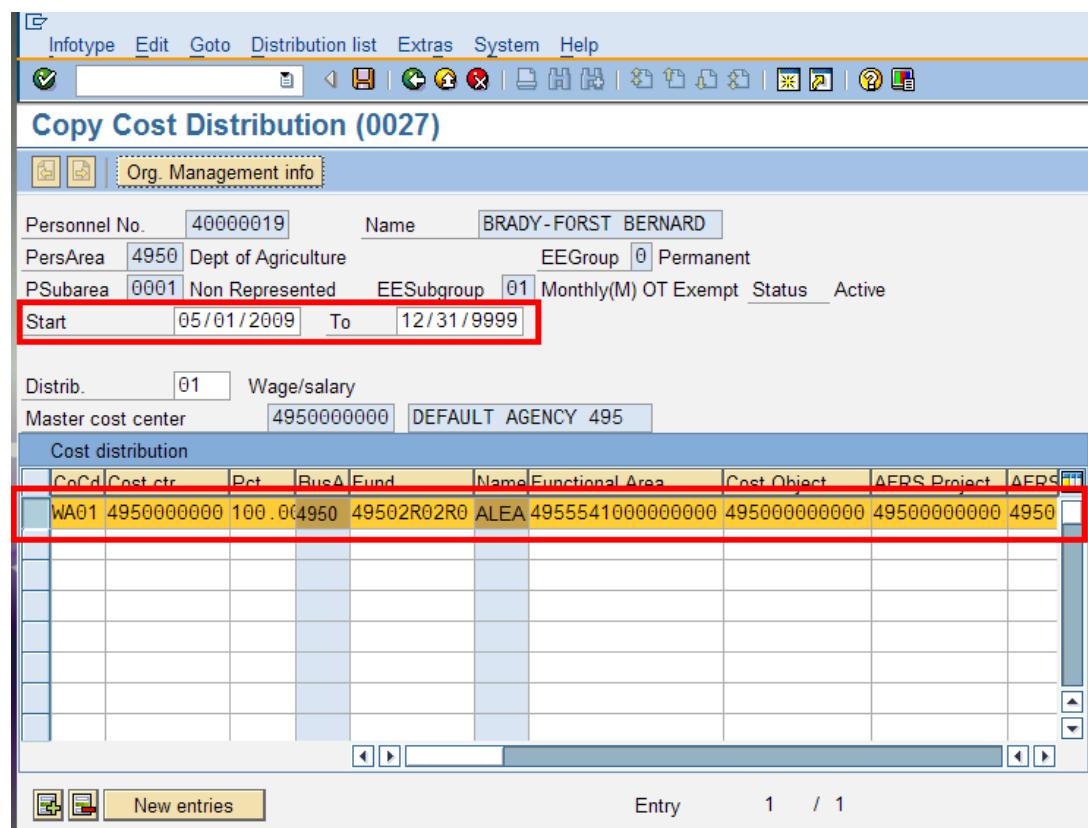
- An employee is under-filling a position when they are hired into a lower job class than the position.
  - This typically occurs when the employee is in an in-training appointment.
- There is an additional handoff required with the Organizational Management Processor if an employee is hired into a position that:
  - Is designated as “In-training” or as an under-fill.
- Complete the Hire Action (new hire, rehire, or appointment change) into HRMS as required.

**Note:** The employee's salary on *Basic Pay* infotype (0008) will default to the compensation that is set up on the position. Change if needed.

- The Personnel Administrator has the responsibility for contacting the Organizational Management Processor to update the “Person to Job Relationship”.

# Scenario 17: *Cost Distribution (0027)*

- The *Cost Distribution (0027)* overrides the assigned cost center to which the Position's costs is incurred.
- Fields to complete:
  - Start / To dates
  - Distrib.
  - Controlling area
  - Cost Center
  - Percentage
  - Fund
  - Functional Area
  - Cost Object
  - AFRS Project
  - AFRS Allocation
- When finished, click  (**Enter**) and then click  (**Save**).



CoCd	Cost ctr	Pct	BusA	Fund	Name	Functional Area	Cost Object	AFRS Project	AFRS Allocation
WA01	4950000000	100.0	49502R02R0	ALEA	4955541000000000	495000000000	495000000000	495000000000	4950

To 'create' or 'maintain' this infotype, use transaction code **PA30**.

# **Scenario 17: *Cost Distribution* (0027) – cont'd**

- During the Appointment Change and Separation Action (**PA40**), the *Delimit Cost Distribution* (0027) may appear and will need to be delimited using the appropriate date.
  - This date should cover the record up to the employee's very last day of employment.
  - As a gaining agency performing the Appointment Change action (**PA40**), it is very important to delimit the Cost Distribution as this can cause payroll related issues for both agencies.
- When maintaining Cost Distribution (0027) always use  the (Copy) function.

# Cost Distribution Fields

HRMS Field Name	SOW Accounting Object	Code Calculation	Format	Example (DOP)
Cost Center	Organizational Index	Three character business area + AFRS Org. Index + 000	<b>AAAXXXX000</b>	111H110000
Fund	Appropriation Index & Fund	Three character business area + AFRS Fund + AFRS Appropriation Index + 0	<b>AAAXXXXXX0</b>	1114199020
Functional Area	Program Index	Three character business area + AFRS Program Index + 00000000	<b>AAAXXXXX00000000</b>	1110990000000000
Cost Object	Master Index	Three character business area + AFRS Master Index + 0	<b>AAAXXXXXXXXX0</b>	111000130000
AFRS Project	Project, Sub Project & Phase	Three character business area + AFRS project + AFRS subproject + AFRS Project Phase	<b>AAAXXXXXXXX</b>	11191010000
AFRS Allocation	Allocation	Three character business area + AFRS Allocation Code	<b>AAAXXXX</b>	1110000

**Legend:**

A - Three Character business area

X- The AFRS accounting object embedded within the field

0- filler characters, usually 0

**Example explanation:**

111H110000 – Agency 111, AFRS Org Index H110, 000

# HRMS Resources

## ■ The following resources are available for your use:

- DOP Service Center— (360) 664–6400
  - [ServiceCenter@dop.wa.gov](mailto:ServiceCenter@dop.wa.gov)
- The On-Line Quick Reference
  - <http://www.dop.wa.gov/payroll/HRMS/OnLineQuickReference/>
- HRMS Support Website
  - <http://www.dop.wa.gov/payroll/HRMS/HRMSSupport/Pages/default.aspx>
- HRMS Data Definitions
  - <http://pub/payroll/HRMS/OnLineQuickReference/Pages/DataDefinitions.aspx>

# Question and Answer



# Training Evaluation

- Please take a few minutes to complete the course evaluation prior to leaving.



Thank you for  
your participation