PER-76 Reallocation Action

Purpose

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

Trigger

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

Business Process Procedure Overview

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

- **01 - Reallocation Up** – employee graded or banded has been assigned to a higher-level job to recognize the higher-level duties.
- **02 - Reallocation Inc Partial** - employee receives a portion of the increase.
- **03 - Reallocation Inc** - After Eff Date Complete - employee receives remainder of increase.

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

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

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

(No change in position number)

Notes:

- Agency OM must process the change on the position prior to PA initiating the Reallocation Workflow on the employee.
- If funding is not available HR PA still initiates the Reallocation WF Action and chooses the appropriate reason for the employee. HR must then execute PA30 Maintain Master Data (IT0052-subtype 0200 Wage Maintenance) to reserve the balance.

Tips and Tricks

Prior to initiating any workflow, ensure the data being used is valid and appropriate.

Procedure

There are 17 steps to complete this process.

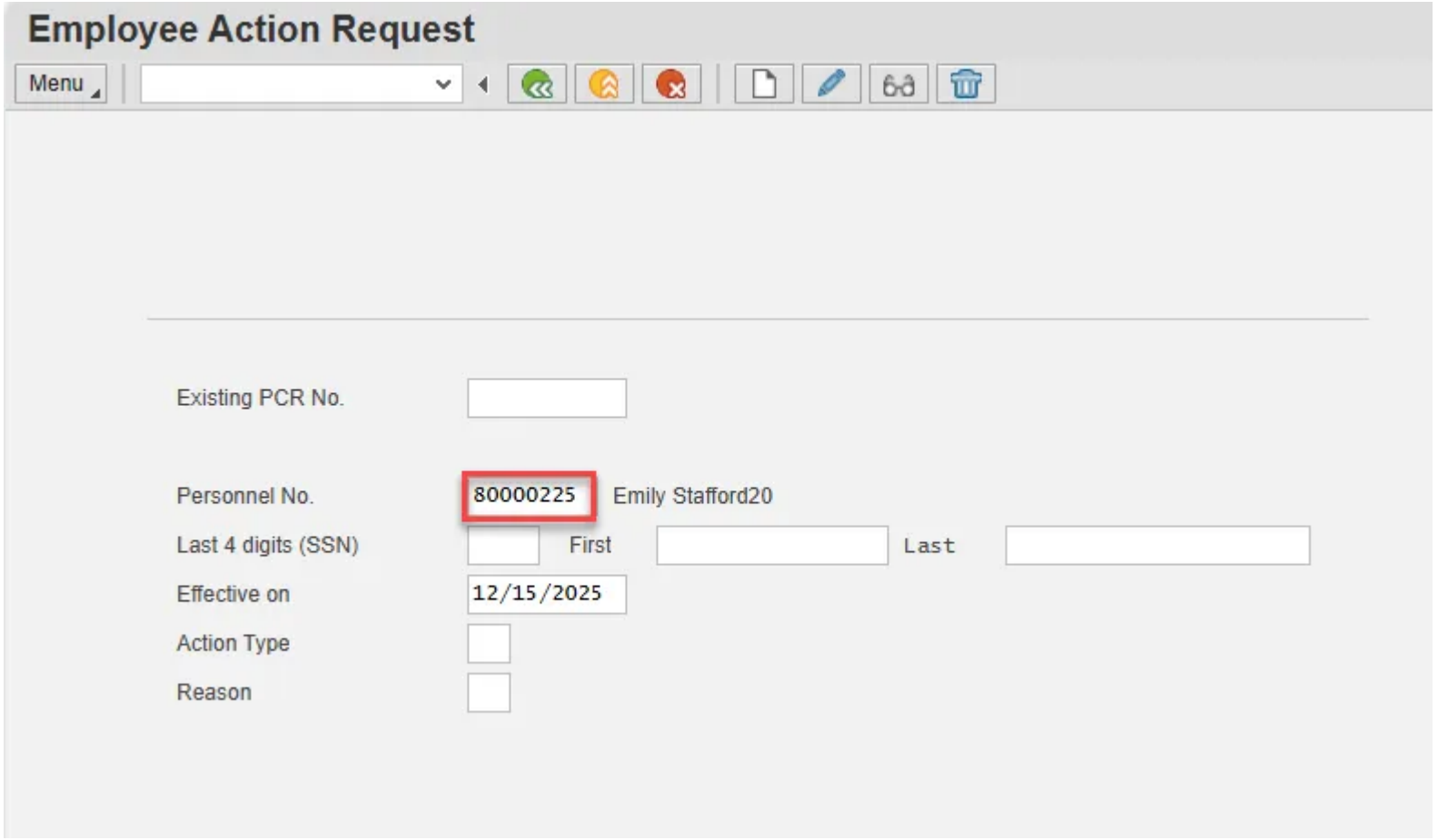
Step 1. From the SAP Easy Access page, select transaction code **ZPAA076**.

Image



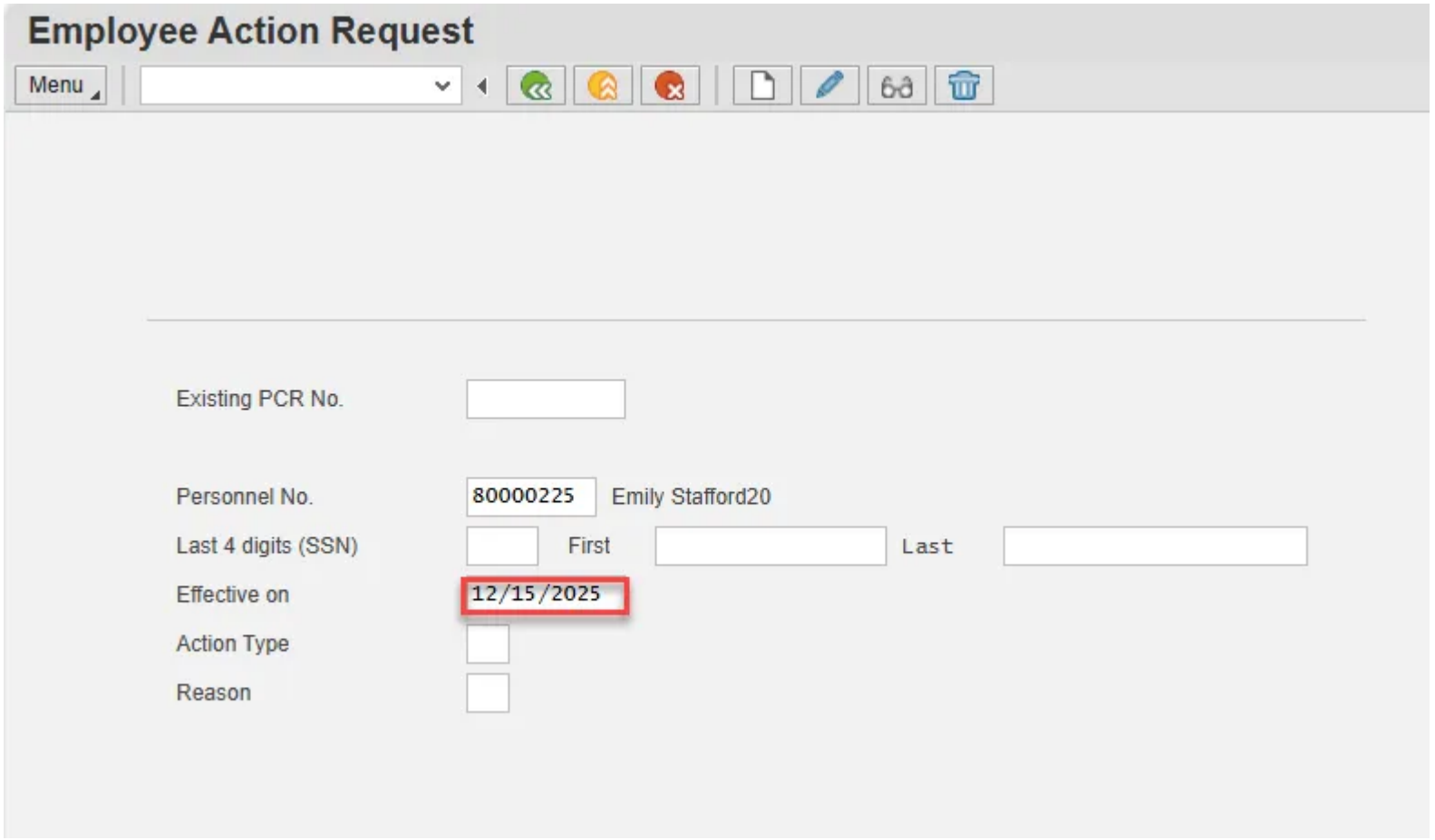
Step 2. On the Employee Action Request screen, update the Personnel No. field and select **Enter** on the keyboard.

Image



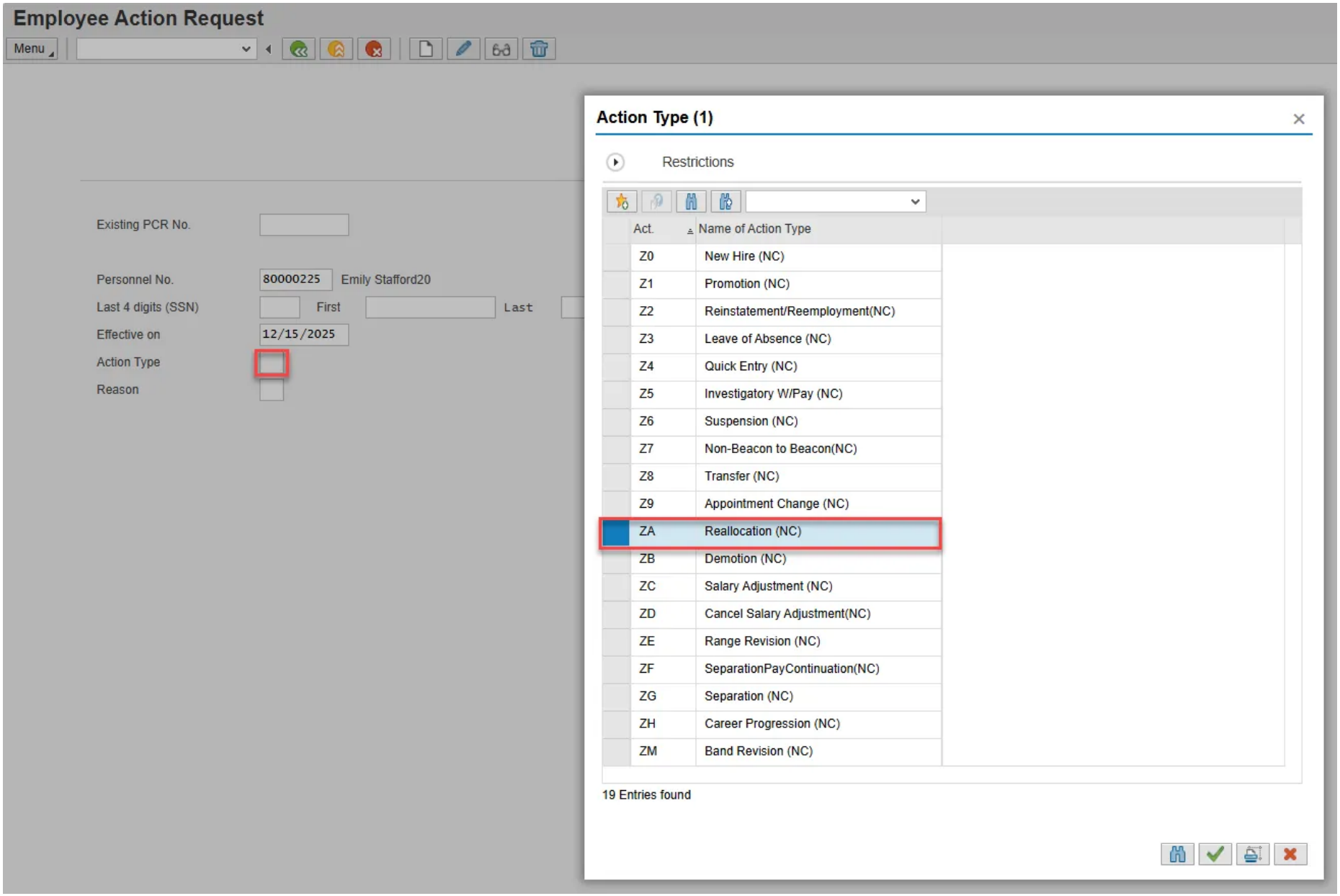
Step 3. Update the Effective on field with the correct effective date.

Image



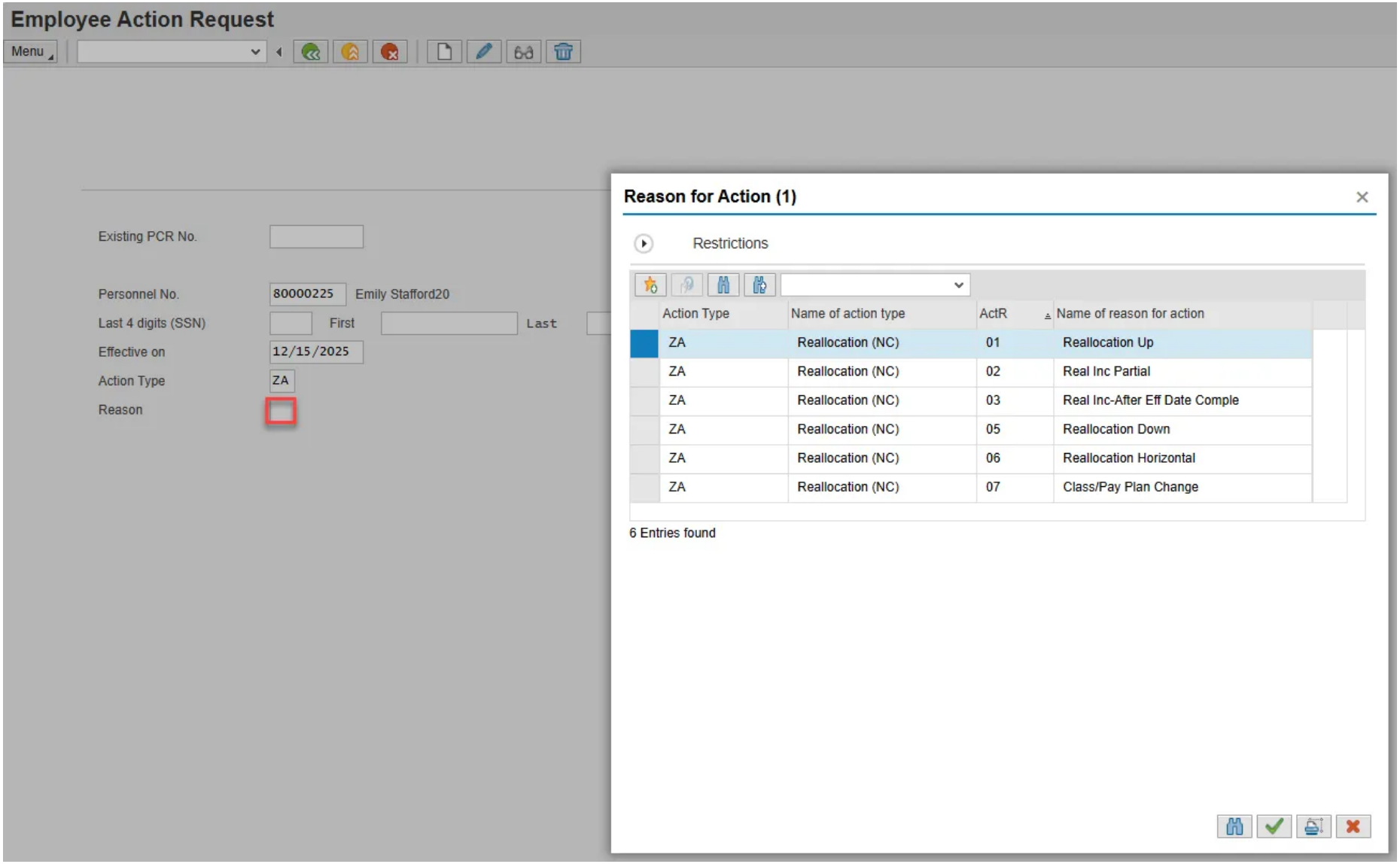
Step 4. Select the matchcode in the Action Type field and double click **Reallocation** from the list.

Image


Employee Action Request
Menu
Existing PCR No.
Personnel No.
80000225
Emily Stafford20
Last 4 digits (SSN)
First
Last
Effective on
12/15/2025
Action Type
Reason
Action Type (1)
Restrictions
Act.
Name of Action Type
Z0 New Hire (NC)
Z1 Promotion (NC)
Z2 Reinstatement/Reemployment(NC)
Z3 Leave of Absence (NC)
Z4 Quick Entry (NC)
Z5 Investigatory W/Pay (NC)
Z6 Suspension (NC)
Z7 Non-Beacon to Beacon(NC)
Z8 Transfer (NC)
Z9 Appointment Change (NC)
ZA Reallocation (NC)
ZB Demotion (NC)
ZC Salary Adjustment (NC)
ZD Cancel Salary Adjustment(NC)
ZE Range Revision (NC)
ZF SeparationPayContinuation(NC)
ZG Separation (NC)
ZH Career Progression (NC)
ZM Band Revision (NC)
19 Entries found

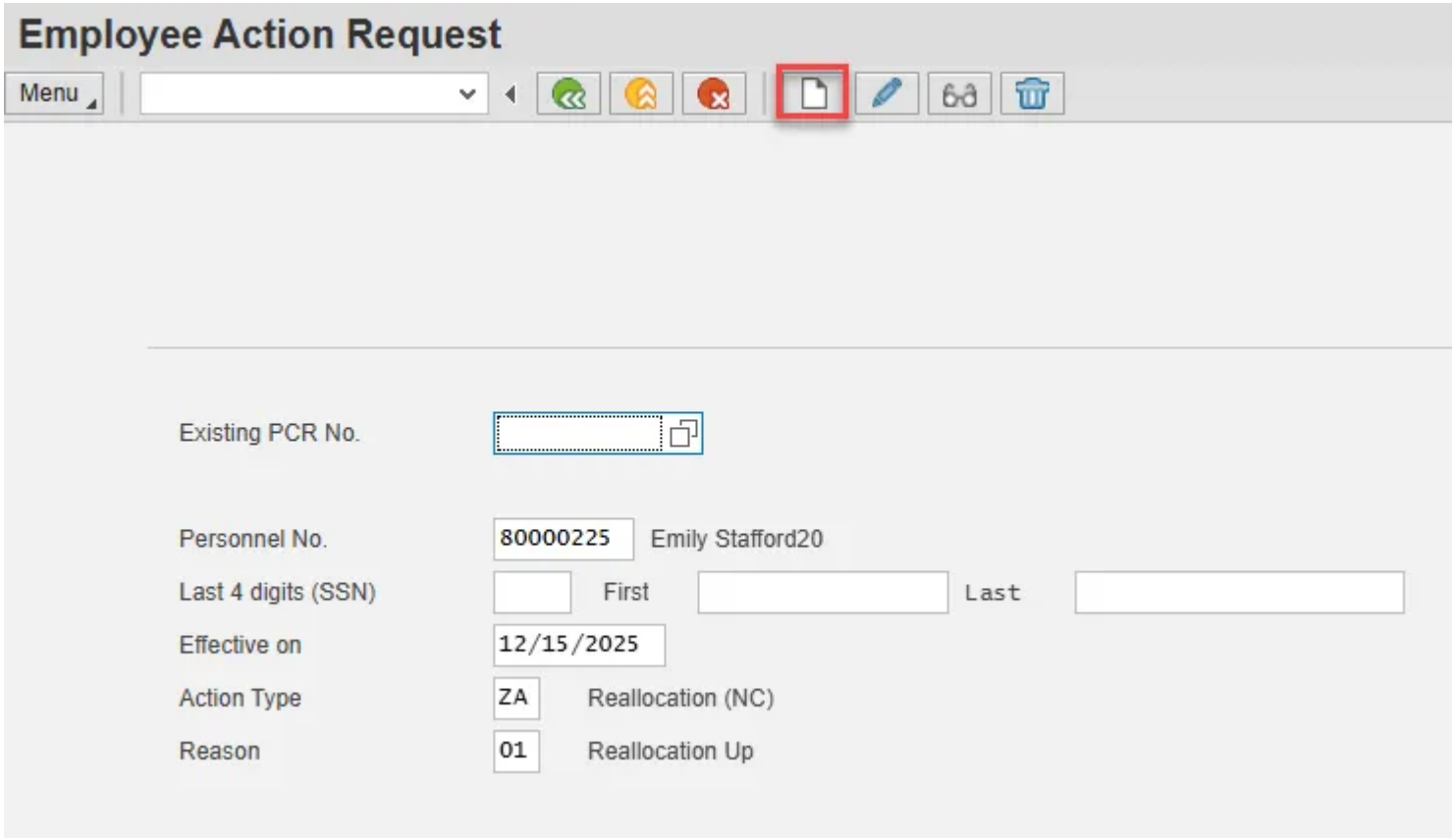
Step 5. Select the matchcode in the Reason field and double click the **appropriate reason** for the Reallocation action.

Image



Step 6. Select **Enter** on the keyboard and choose the **Create** button.

Image



Step 7. Enter the salary information in the Annual Salary field.

Make sure the Level field represents the level associated with the range of the salary. Choose the matchcode to find the correct level.

Image

Employee Action Request

Menu | Initiate WF

PCR Number

Personnel Number 80000225 Emily Stafford20 Action: ZA Reallocation (NC)

Last 4 digits(SSN) Reason: 01 Reallocation Up

Effective on 12/15/2025 Chng St:

	CURRE...		PROPOS...	
Pers.Area	4601	Natural and Cultural Resources	4601	Natural and Cultural Resources
Subarea	NC01	7day Norm	NC01	7day Norm
EE Group	A	SHRA Employees	A	SHRA Employees
EE Subgroup / EE Subgrp	B1	FT S-FLSAOT Perm	B1	FT S-FLSAOT Perm
Org. Unit	20000244	CR CDS NC SYMPHONY Financ	20000244	CR CDS NC SYMPHONY Financ
Job	32000221	Accounting Technician I	32000221	Accounting Technician I
EE Position	65001895	Accounting Technician III	65001895	Accounting Technician III

Basic Pay

Pay Scale type	07 General		Pay Scale type	18 North Carolina	
Pay Scale Area	01 Annual Salaries		Pay Scale Area	01 Annual Salaries	
Pay Scale Group	GN07	Level 01	Pay Scale Group	NC05	Level 02
Annual Salary	36,500.00	Hrly Sal 0.00	Annual Salary	40,150.00	Hourly Salary
	Calc Step - -MP			Calc Step - -MP	10.00
			Min	38,759.00	
			Max	44,877.00	Next Inc Date

Step 8. Choose **Enter** on the keyboard and **Save**.

Image

Employee Action Request

Menu | Initiate WF

PCR Number

Personnel Number 80000225 Emily Stafford20 Action: ZA Reallocation (NC)

Last 4 digits(SSN) Reason: 01 Reallocation Up

Effective on 12/15/2025 Chng St:

	CURRE...		PROPOS...	
Pers.Area	4601	Natural and Cultural Resources	4601	Natural and Cultural Resources
Subarea	NC01	7day Norm	NC01	7day Norm
EE Group	A	SHRA Employees	A	SHRA Employees
EE Subgroup / EE Subgrp	B1	FT S-FLSAOT Perm	B1	FT S-FLSAOT Perm
Org. Unit	20000244	CR CDS NC SYMPHONY Financ	20000244	CR CDS NC SYMPHONY Financ
Job	32000221	Accounting Technician I	32000221	Accounting Technician I
EE Position	65001895	Accounting Technician III	65001895	Accounting Technician III

Basic Pay

Pay Scale type	07 General		Pay Scale type	18 North Carolina	
Pay Scale Area	01 Annual Salaries		Pay Scale Area	01 Annual Salaries	
Pay Scale Group	GN07	Level 01	Pay Scale Group	NC05	Level 02
Annual Salary	36,500.00	Hrly Sal 0.00	Annual Salary	40,150.00	Hourly Salary
	Calc Step - -MP			Calc Step - -MP	10.00
			Min	38,759.00	
			Max	44,877.00	Next Inc Date

Step 9. You can save this information as many times as you like. Each time you will receive a confirmation of the save. Choose the **green check** in the bottom right of the pop-up.

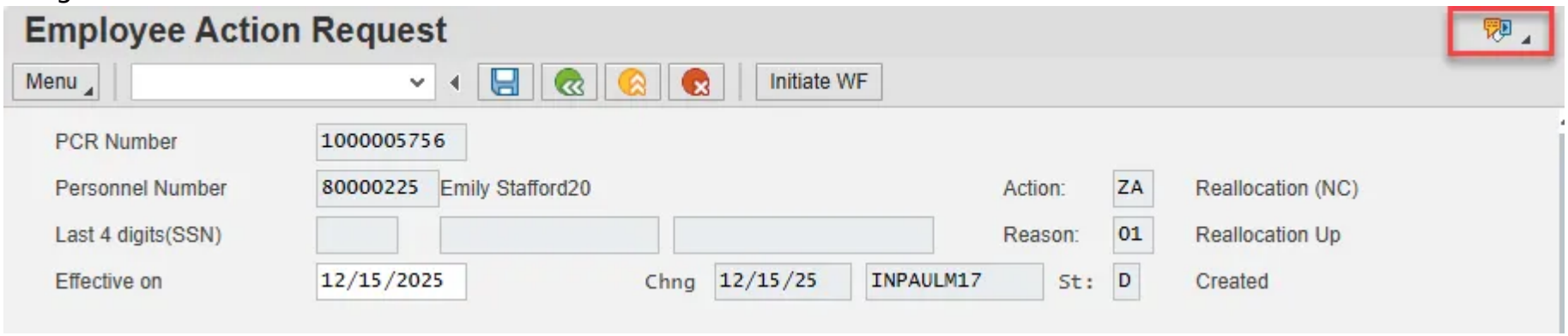
Image



Note: You will not be able to create a note attachment until you have saved it at least once. If you have submitted the PCR to workflow already, you will not be able to change the details, nor save any new information, only display the existing details.

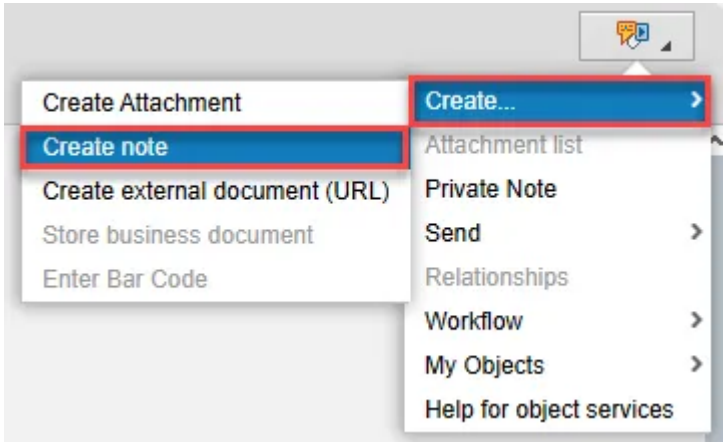
Step 10. Select the **Services for Object** button in the upper right corner.

Image



Step 11. Hover over Create and choose **Create note** from the drop-down menu.

Image

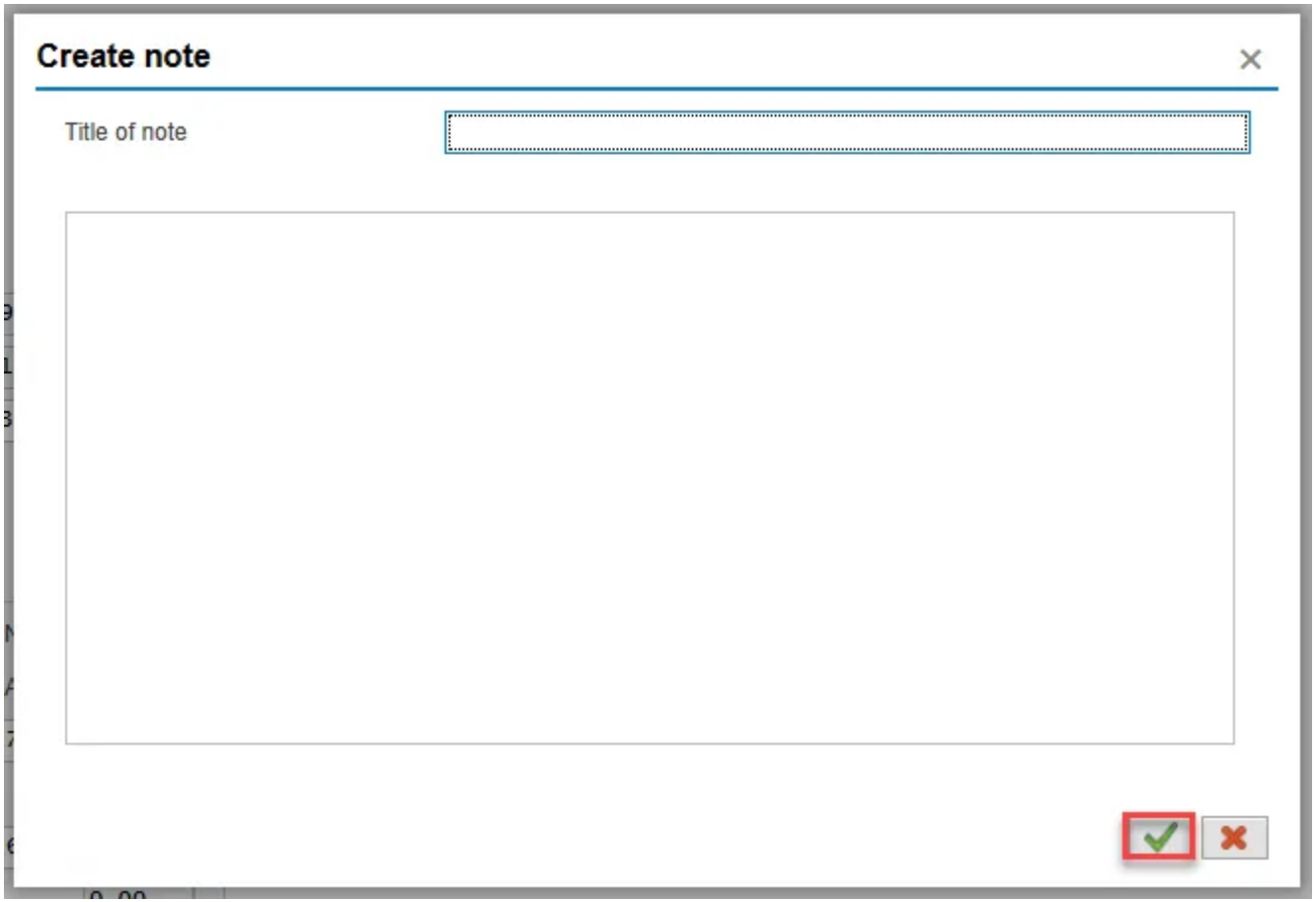


Step 12. Update the Title of note field and the body of the note.

The note is a required part of the request creation process. Notes entered during PA workflow must follow OSHR's action notes template PA Action Notes Template.

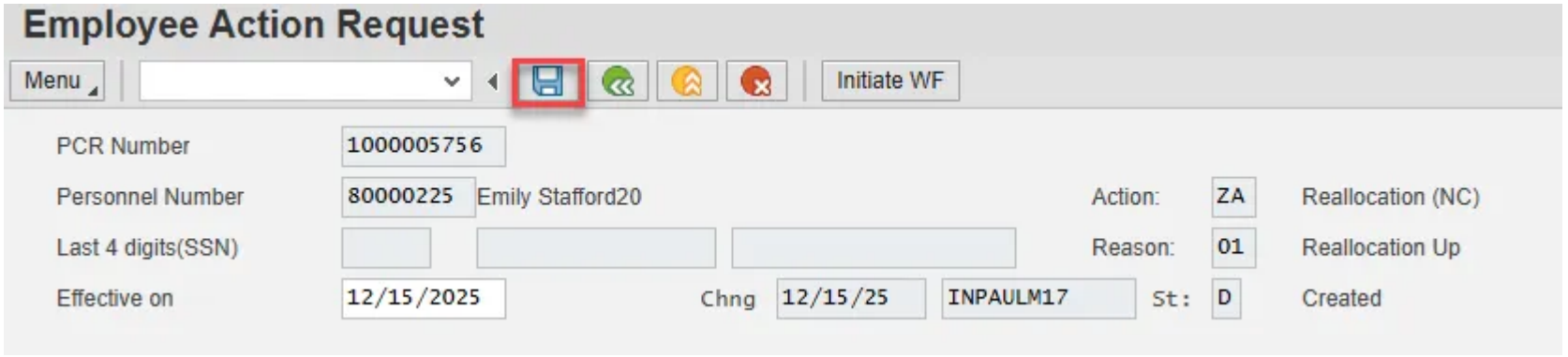
Choose the **green check** button in bottom right of note pop-up.

Image



Step 13. Choose **Save**.

Image



Step 14. Select the **green check** button in bottom right of Information pop-up.

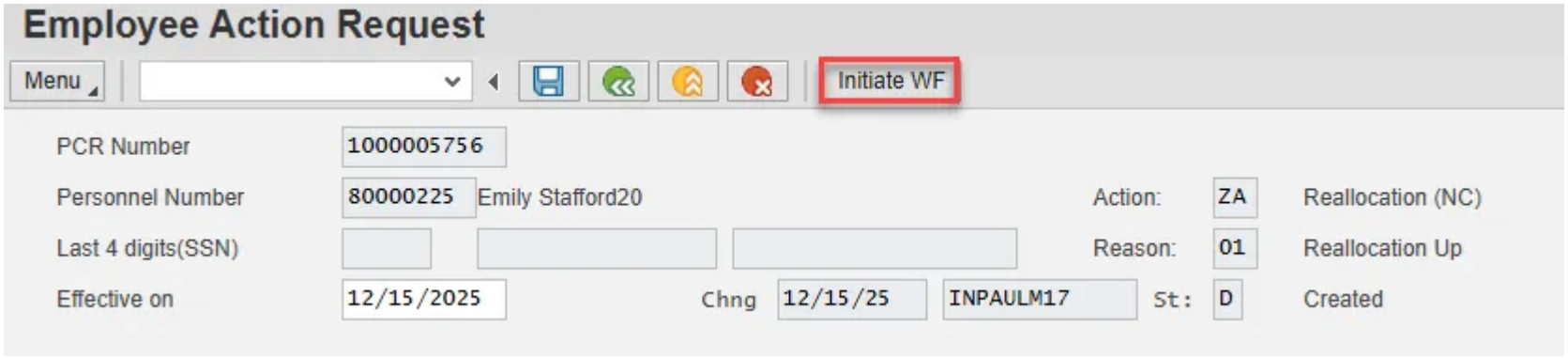
Image



Step 15. Choose the **Initiate WF** button.

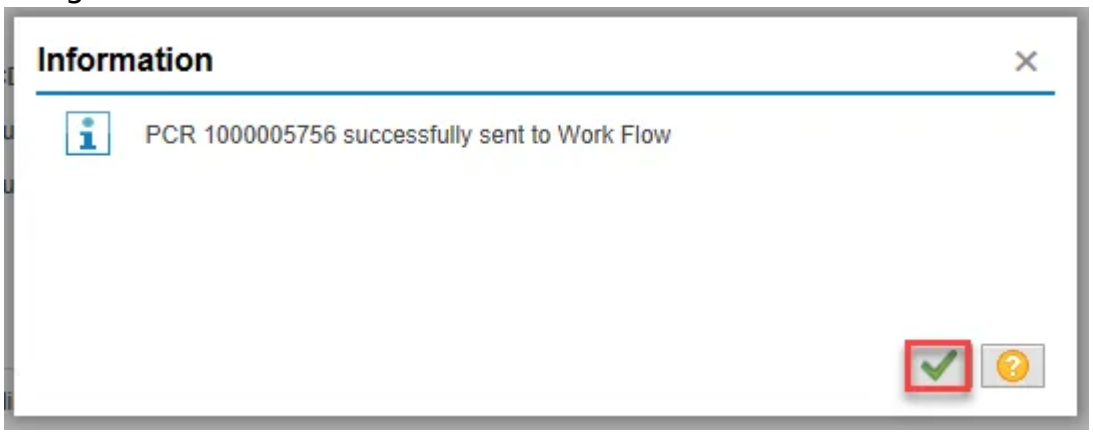
Select the Initiate Workflow button to send the Reallocation Action through the approval process. No changes can be made after the PCR has been submitted for approval, unless the PCR is rejected at any stage and sent back to you (the initiator/requestor).

Image



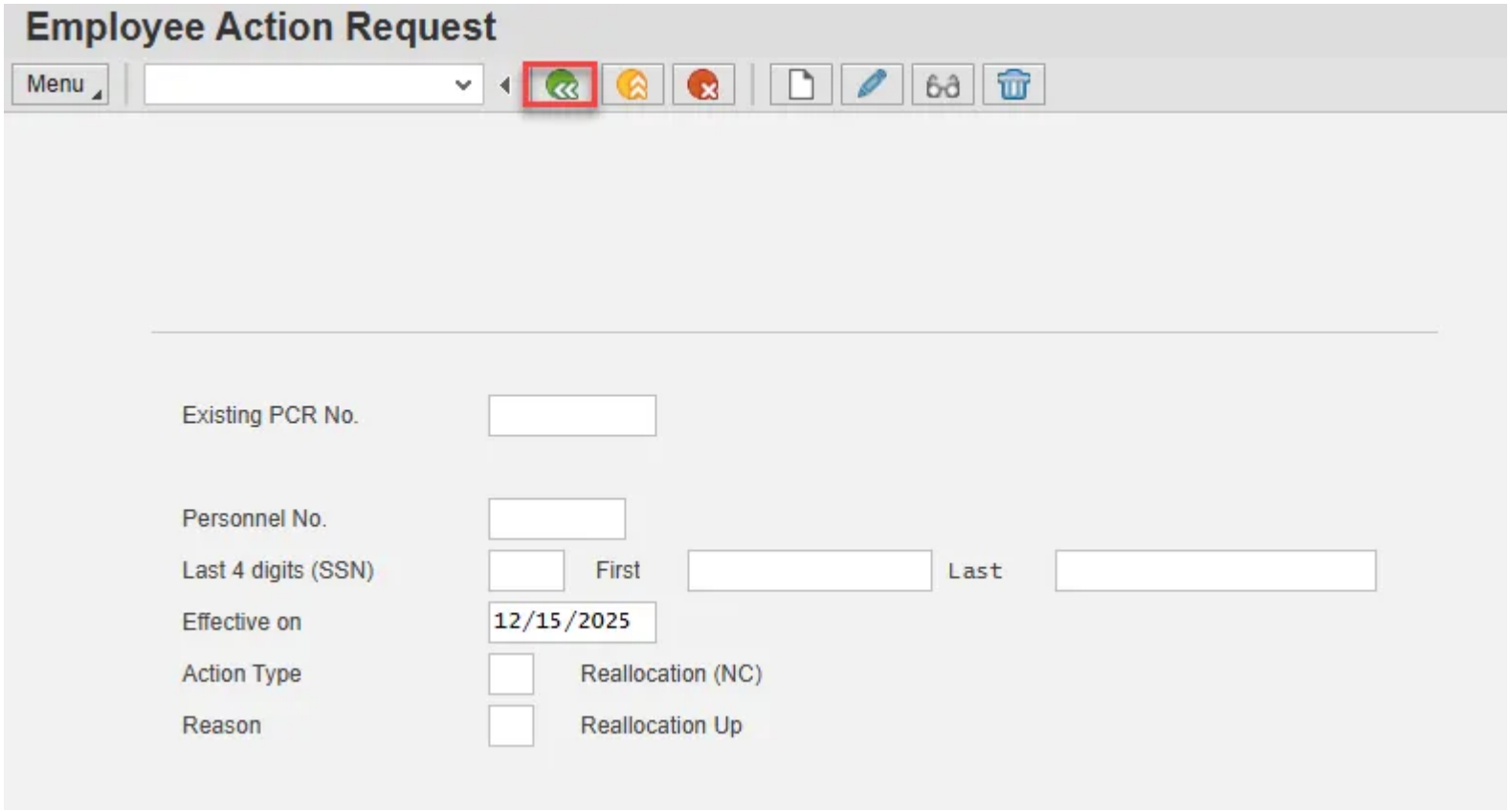
Step 16. Select the **green check** button in bottom right of the Information pop-up.

Image



Step 17. Choose the **green Back** button.

Image



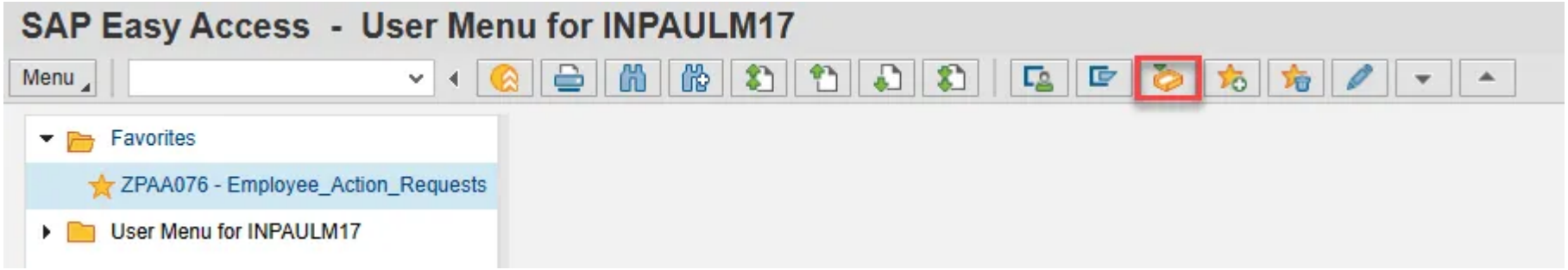
After Workflow Approvals have been received, proceed with the Complete Reallocation Action process.

Instructions for Completing the Action

There are 19 steps to complete this process.

Step 1. Choose the **SAP Business Workplace** button from the SAP Easy Access page.

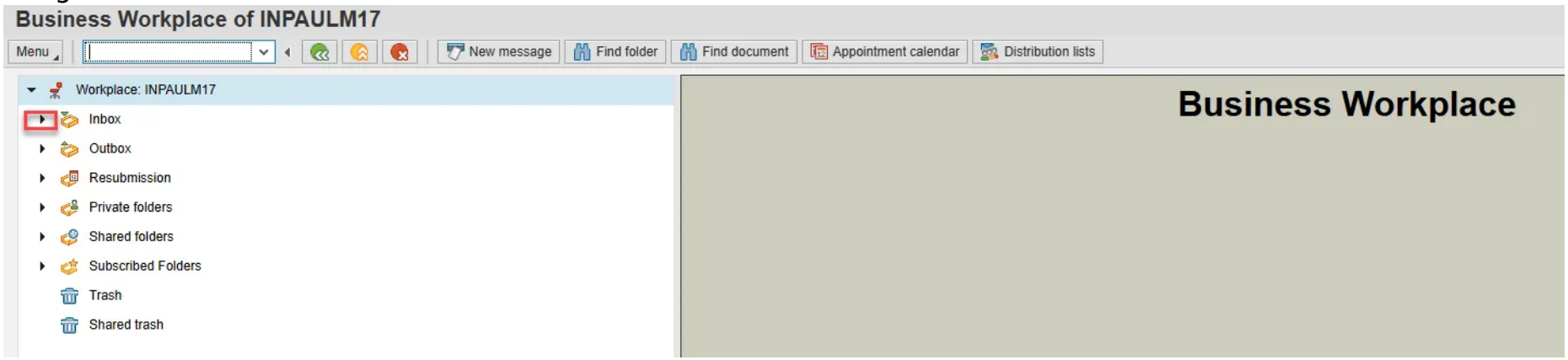
Image



Step 2. Expand the Inbox using the expand node.

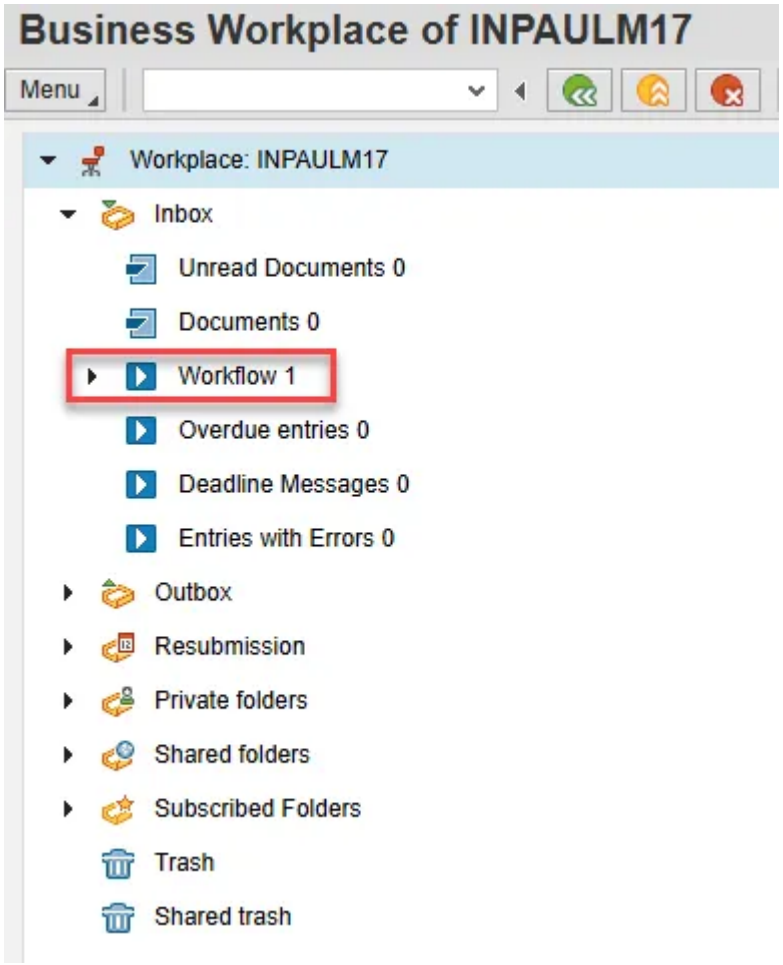
Note: Failure to complete this step could cause some functions to be unavailable on the secondary button ribbon in the subfolders.

Image



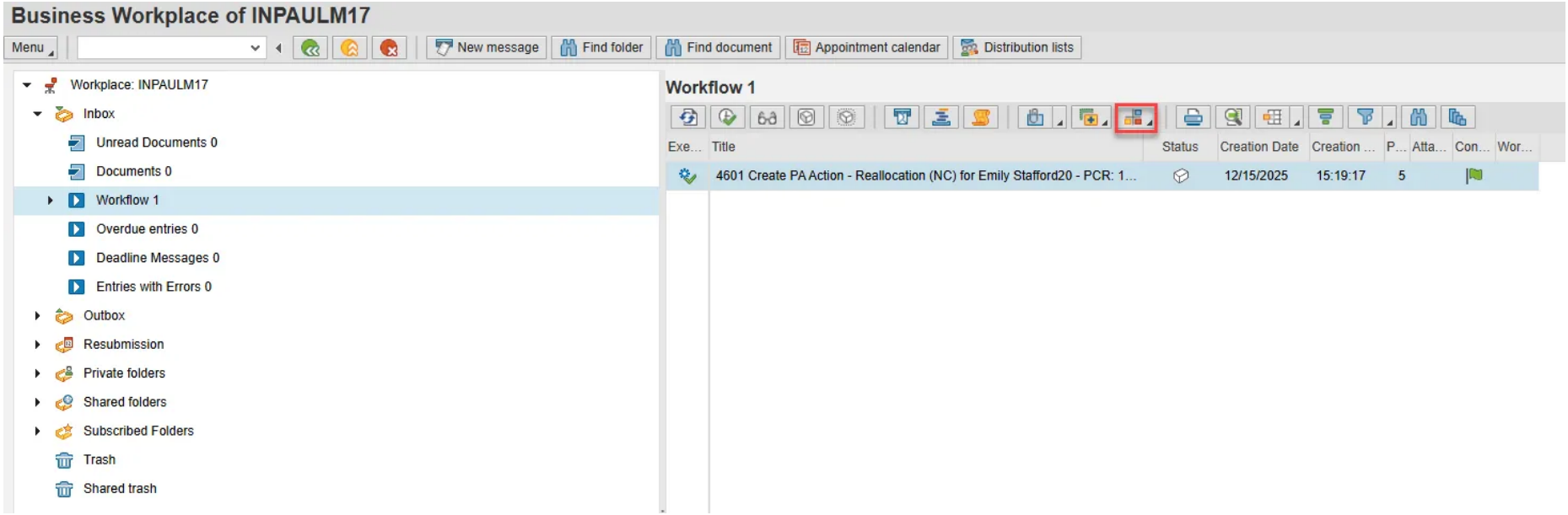
Step 3. Select the **Workflow** subfolder.

Image



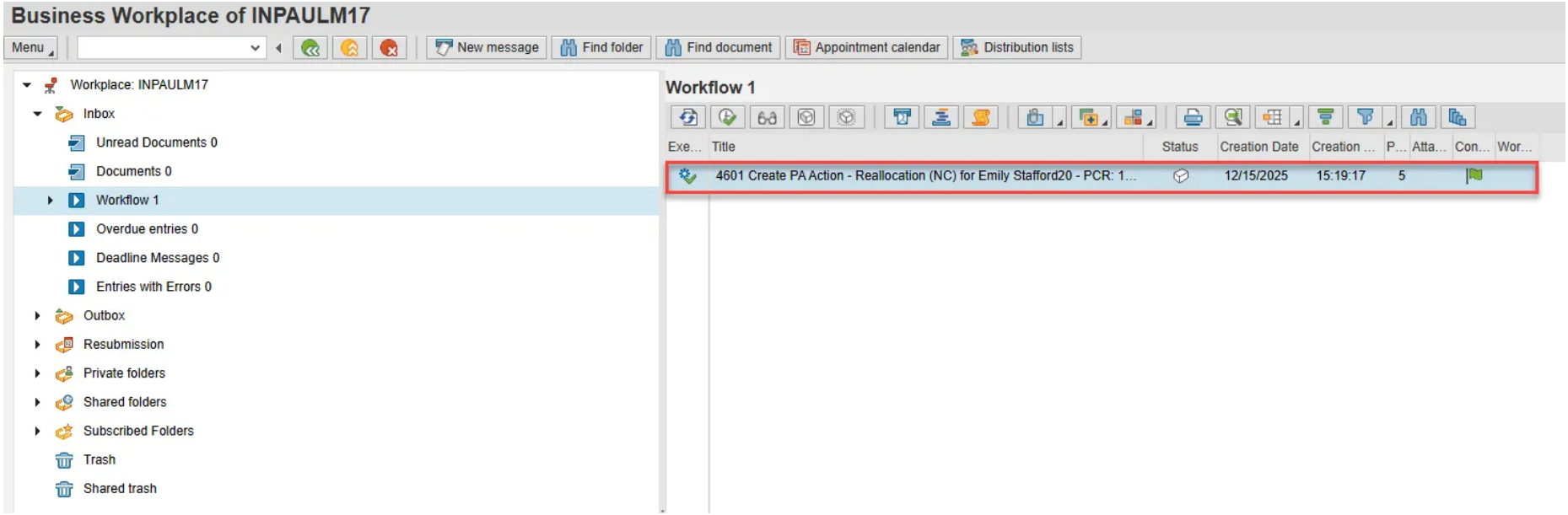
Step 4. Access the Environment button on the secondary button ribbon to retrieve a copy of the note. Access PER-57 Copying Notes from the PCR to Infotypes for steps on retrieving the note.

Image



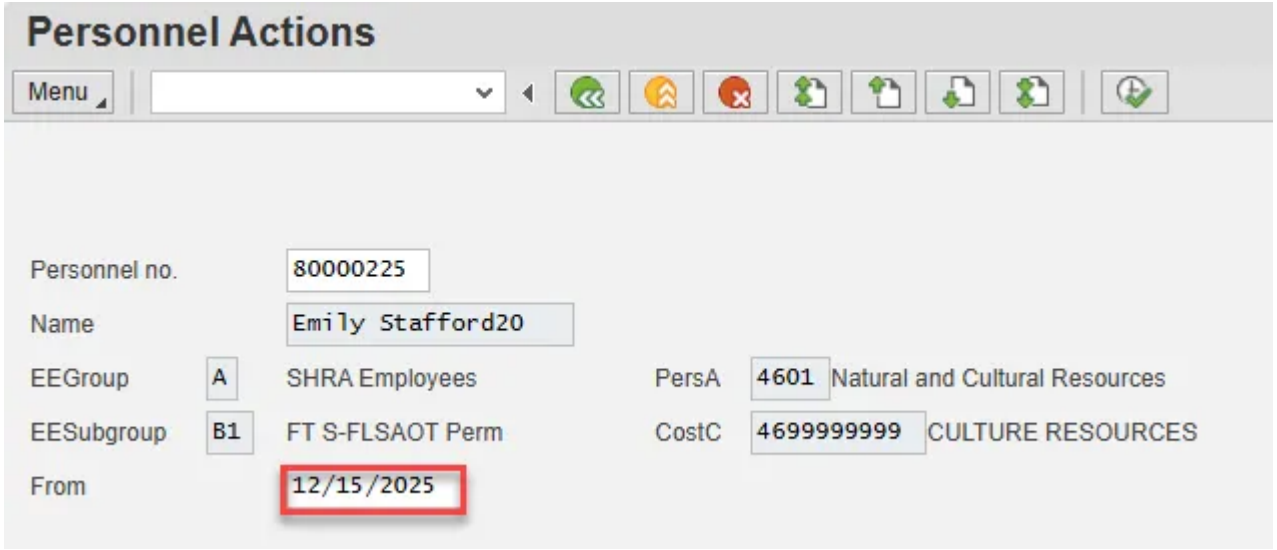
Step 5. Double click the **PCR** to begin the action.

Image



Step 6. On the Personnel Actions screen, enter the effective date in the From field. This must match the effective date used to create the request.

Image



Step 7. Highlight **Reallocation** by selecting the **gray box** at the beginning of the row.

Image

Personnel Actions

Menu

Personnel no.	80000225				
Name	Emily Stafford20				
EEGroup	A	SHRA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	B1	FT S-FLSAOT Perm	CostC	4699999999	CULTURE RESOURCES
From	12/15/2025				

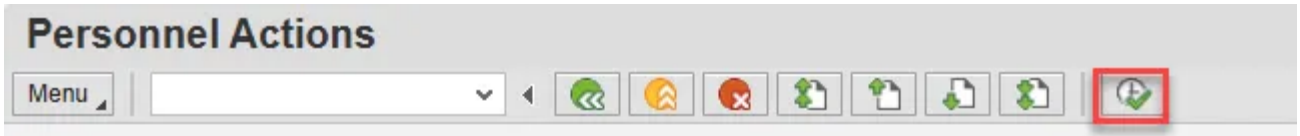
Personnel Actions

Action Type	Personne...	EE group	EE subgr...
New Hire (NC)			
Promotion (NC)			
Reinstatement/Reemployment(NC)			
Leave of Absence (NC)			
Quick Entry (NC)			
Investigatory W/Pay (NC)			
Suspension (NC)			
Non-Beacon to Beacon(NC)			
Transfer (NC)			
Appointment Change (NC)			
Reallocation (NC)			
Demotion (NC)			
Salary Adjustment (NC)			
Cancel Salary Adjustment(NC)			
Range Revision (NC)			
SeparationPayContinuation(NC)			

Step 8. Choose the **Execute** button.

Image

Personnel Actions



Personnel no. 80000225

Name Emily Stafford20

EEGroup A SHRA Employees

EESubgroup B1 FT S-FLSAOT Perm

From 12/15/2025

PersA 4601 Natural and Cultural Resources

CostC 4699999999 CULTURE RESOURCES

Personnel Actions

Action Type	Personne...	EE group	EE subgr...
New Hire (NC)			
Promotion (NC)			
Reinstatement/Reemployment(NC)			
Leave of Absence (NC)			
Quick Entry (NC)			
Investigatory W/Pay (NC)			
Suspension (NC)			
Non-Beacon to Beacon(NC)			
Transfer (NC)			
Appointment Change (NC)			
Reallocation (NC)			
Demotion (NC)			
Salary Adjustment (NC)			
Cancel Salary Adjustment(NC)			
Range Revision (NC)			
SeparationPayContinuation(NC)			

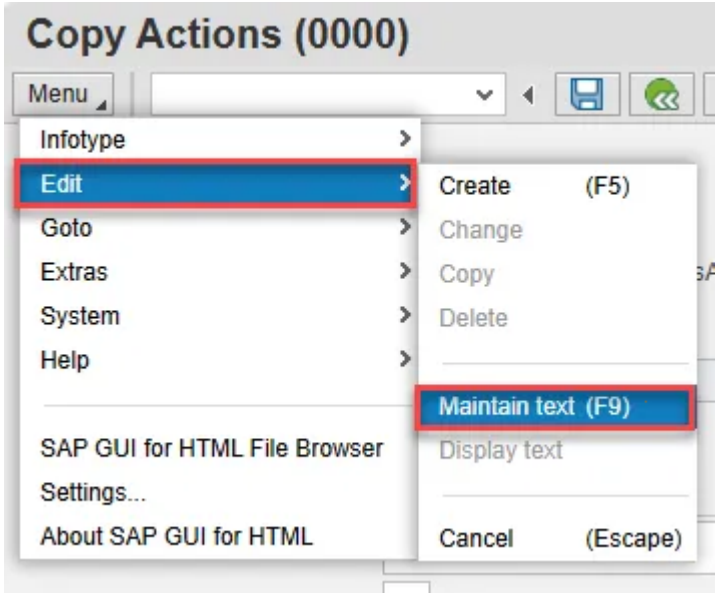
Step 9. On Copy Actions (0000), choose the **Menu** button.

Image



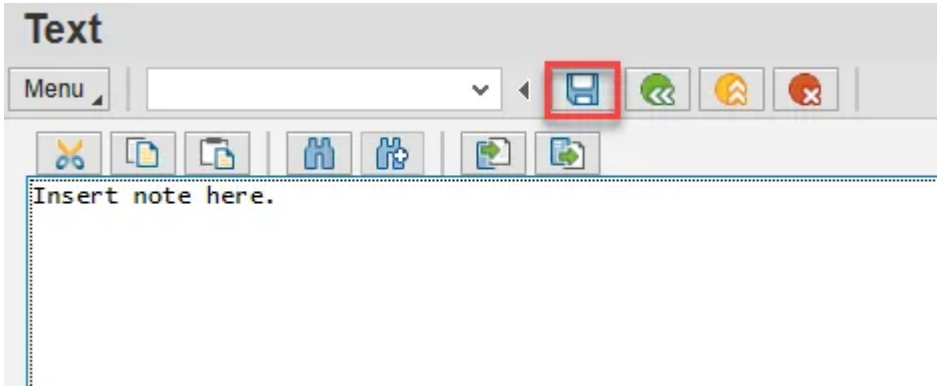
Step 10. Hover over Edit and choose **Maintain text (F9)** from the pop-out menu.

Image



Step 11. On the Text screen, insert your note and choose **Save**.

Image



Step 12. Back on the Copy Actions (0000) screen, choose **Enter** on the keyboard.

Some items may turn red and there may be a yellow warning message in the bottom left stating that a record is being delimited. This is expected behavior. Choose **Save**.

Image

Copy Actions (0000)

Menu | Execute info group | Change info group

Pers.No. 80000225

Name Emily Stafford20

EEGroup A SHRA Employees PersA 4601 Natural and Cultural Resources

EESubgroup B1 FT S-FLSAOT Perm

Start 12/15/2025 to 12/31/9999

Personnel action

Action Type ZA Reallocation (NC)

Reason for Action 01 Reallocation Up

Status

Customer-specific

Employment 3 Active

Special payment 1 Standard wage type

Organizational assignment

Position 65001895 Accounting Technician III

Personnel area 4601 Natural and Cultural Resources

Employee group A SHRA Employees

Employee subgroup B1 FT S-FLSAOT Perm

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action

Step 13. On Create Organizational Assignment (0001), select **Enter** on the keyboard.

Some items may turn red and there may be a yellow warning message in the bottom left stating that a record is being delimited.

This is expected behavior. Choose **Save**.

Image

Create Organizational Assignment (0001)

Menu | Org Structure

Personnel No	80000225	Name	Emily Stafford20		
EEGroup	A	SHRA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	B1	FT S-FLSAOT Perm	Statu	Active	
Start	12/15/2025	o	12/31/9999		

Enterprise structure

CoCode	NC01	STATE OF NC			
Pers.area	4601	Natural and Cultural Resour...	Subarea	NC01	7day Norm
Cost Ctr	4699999999	CULTURE RESOUR...	Bus. Area	4600	DNCR
Fund	469999999	CULTURE- SUSPENCE			
Func. Area	G000000000000001	General Government			

Personnel structure

EE group	A	SHRA Employees	Payr.area	01	NC Monthly
EE subgroup	B1	FT S-FLSAOT Perm	Contract		

Organizational plan

Percentage	100.00	Assignment
Position	65001895	Actg Tech 21
		Accounting Technician III
Job key	32000228	Actg Tech 3
		Accounting Technician III
Org. Unit	20000244	480799999998
		CR CDS NC SYMPHON...
Org.key	46014699999999	

Step 14. On Create Related Experience (9822), update the Months fields under Related Work Experience and Related Education if you have the information.

Note: If you do not have the information at the time of the Reallocation action, this can be updated via PA30 later.
Enter and Save.

Image

Create Related Experience (9822)

Menu

Personnel No	80000225	Name	Emily Stafford20		
EEGroup	A	SHRA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	B1	FT S-FLSAOT Perm	Statu	Active	
Start	12/15/2025	To	12/31/9999		

(Not to be used for Supplemental Staff)

Classification

Position	65001895	Actg Tech 21 Accounting Technician III
Job	32000228	Actg Tech 3 Accounting Technician III

Related Work Experience

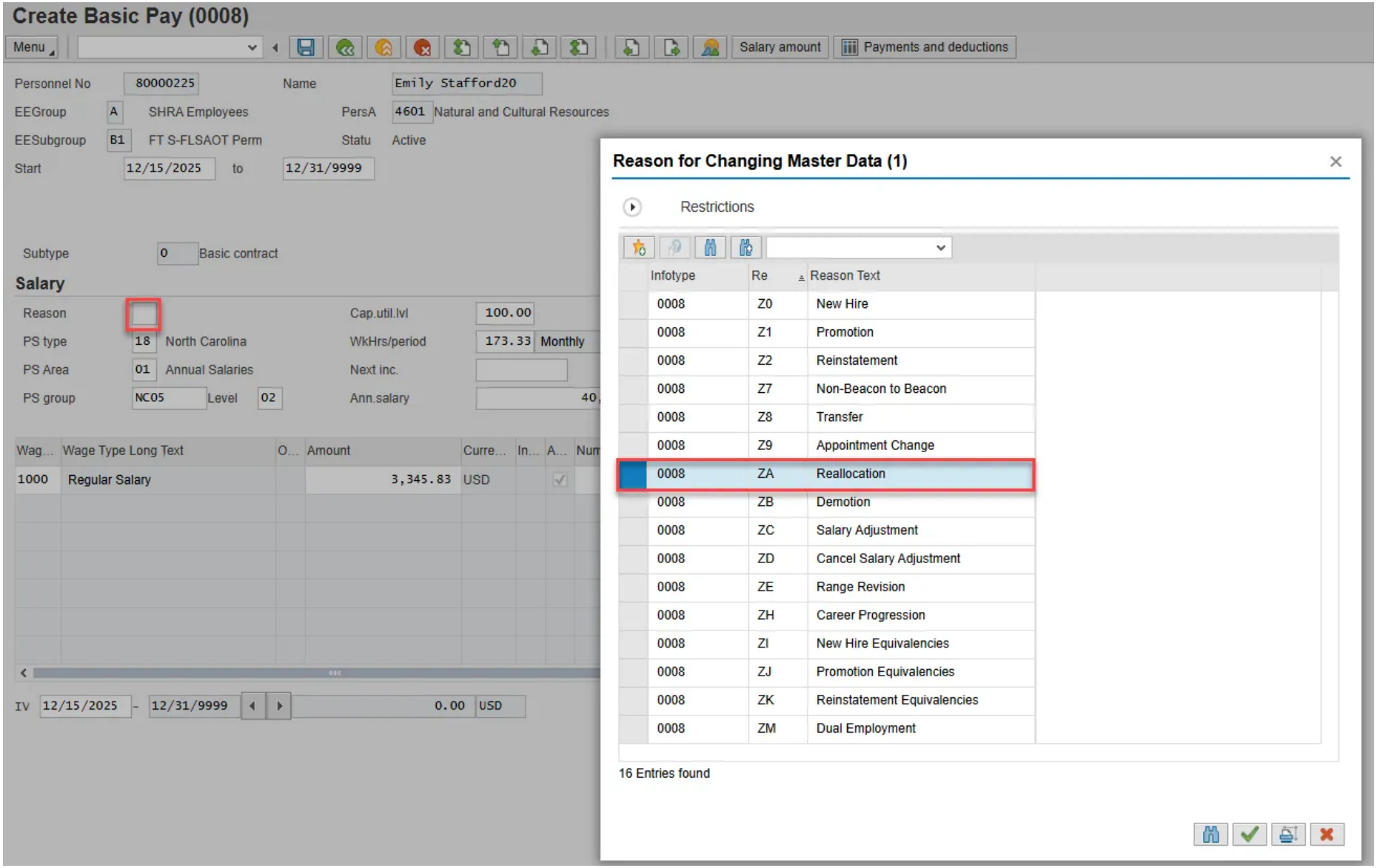
Months: | Calculated Months: 0

Related Education

Months:

Step 15. On Create Basic Pay (0008), select the matchcode in the Reason field and double-click **Reallocation** from the list.

Image



Step 16. Choose **Enter** on the keyboard.

A yellow warning message will appear in the lower left stating that you are delimiting a record.

Choose **Save**.

Image

Create Basic Pay (0008)

Menu | Salary amount | Payments and deductions

Personnel No	80000225	Name	Emily Stafford20		
EEGroup	A	SHRA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	B1	FT S-FLSAOT Perm	Statu	Active	
Start	12/15/2025	to	12/31/9999		

Subtype 0 Basic contract

Salary

Reason	ZA	Reallocation	Cap.util.lvl	100.00	
PS type	18	North Carolina	WkHrs/period	173.33	Monthly
PS Area	01	Annual Salaries	Next inc.		
PS group	NC05	Level 02	Ann.salary	40,150.00	USD

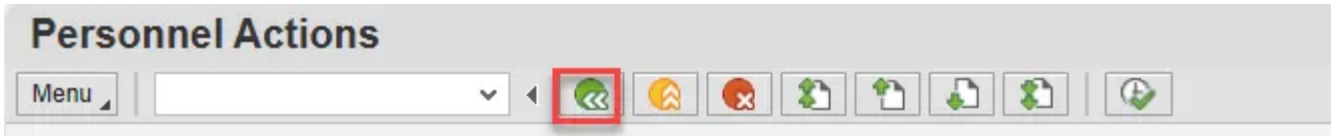
Wag...	Wage Type Long Text	O...	Amount	Curre...	In...	A...	Number/Unit	Unit
1000	Regular Salary		3,345.83	USD		✓		

IV 12/15/2025 - 12/31/9999 3,345.83 USD

Step 17. Back at the Personnel Actions screen, select the **Green Arrow Back** button.

Image

Personnel Actions



Personnel no. 80000225

Name Emily Stafford20

EEGroup A SHRA Employees PersA 4601 Natural and Cultural Resources

EESubgroup B1 FT S-FLSAOT Perm CostC 4699999999 CULTURE RESOURCES

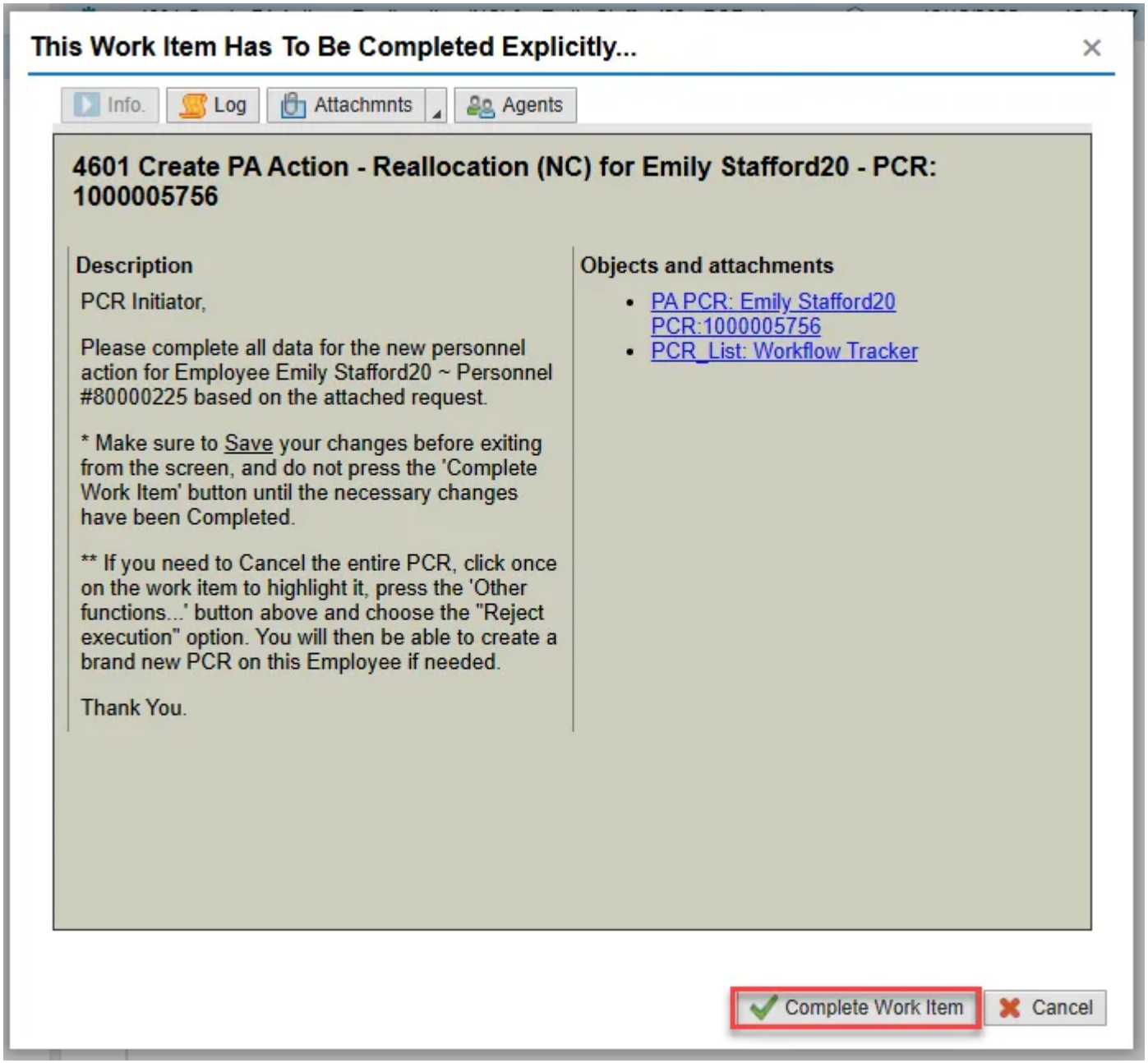
From 12/15/2025

Personnel Actions

Action Type	Personne...	EE group	EE subgr...
New Hire (NC)			
Promotion (NC)			
Reinstatement/Reemployment(NC)			
Leave of Absence (NC)			
Quick Entry (NC)			
Investigatory W/Pay (NC)			
Suspension (NC)			
Non-Beacon to Beacon(NC)			
Transfer (NC)			
Appointment Change (NC)			
Reallocation (NC)			
Demotion (NC)			
Salary Adjustment (NC)			
Cancel Salary Adjustment(NC)			
Range Revision (NC)			
SeparationPayContinuation(NC)			

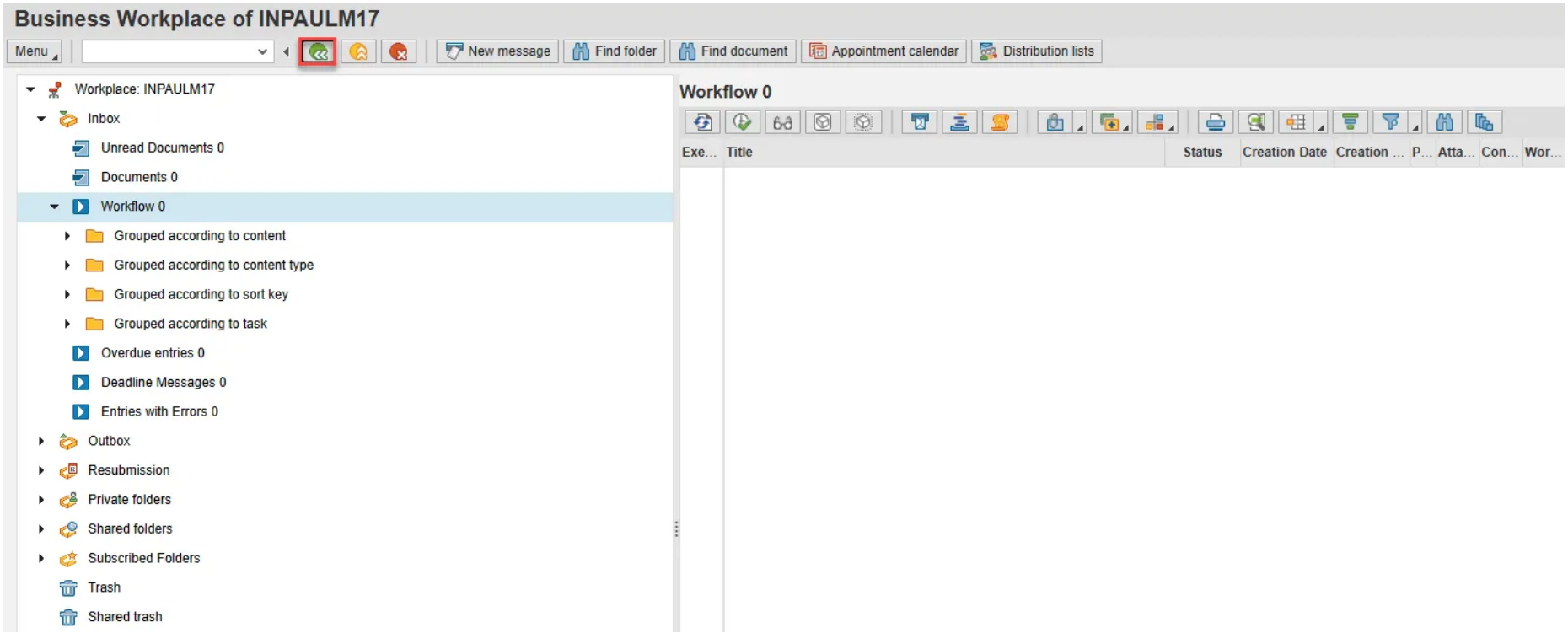
Step 18. On the pop-up, select **Complete Work Item**. (It has a green check beside it.)

Image


This Work Item Has To Be Completed Explicitly...
Info.
Log
Attachmnts
Agents
4601 Create PA Action - Reallocation (NC) for Emily Stafford20 - PCR: 1000005756
Description
PCR Initiator,
Please complete all data for the new personnel action for Employee Emily Stafford20 ~ Personnel #80000225 based on the attached request.
* Make sure to Save your changes before exiting from the screen, and do not press the 'Complete Work Item' button until the necessary changes have been Completed.
** If you need to Cancel the entire PCR, click once on the work item to highlight it, press the 'Other functions...' button above and choose the "Reject execution" option. You will then be able to create a brand new PCR on this Employee if needed.
Thank You.
Objects and attachments
PA PCR: Emily Stafford20 PCR:1000005756
PCR_List: Workflow Tracker
Complete Work Item
Cancel

Step 19. From the Business Workplace screen, select the **Green Arrow Back** button to return to the SAP Easy Access screen.

Image



The Reallocation action is complete, but we recommend reviewing via PA20 all infotypes that have been processed.

First Published

Wed, 12/11/2013

Last Updated

Wed, 02/18/2026

Printable PDF