PER-74 Promotion Action

Purpose

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

Trigger

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

Business Process Procedure Overview

Promotion - movement to a position assigned a higher salary grade or movement between positions from one career-banded class to another with a higher journey market rate or movement from one position to another within the same banded class with a higher competency level.

- **01 - Promotion** - is movement to a position assigned a higher salary grade or movement between positions from one career-banded class to another with a higher journey market rate or movement from one position to another within the same banded class with a higher competency level.
- **02 - Promotion Inc-After Eff Date** – an employee receives remainder of increase with a current effective date.

- **03 - Acting Promotion** - is a temporary movement to a position assigned a higher salary grade or temporary movement between positions from one career-banded class to another with a higher journey market rate or temporary movement from one position to another within the same banded class with a higher competency level. Promotion Inc-After Eff Date – employee receives remainder of increase with a current effective date.

Note: If the Promotion action is for a limited time period, create an infotype 0019 Monitoring of Tasks record via transaction code PA30 to create a reminder to process the Cancel Salary Adjustment at the end date of the Promotion/Acting Promotion.

Tips and Tricks

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

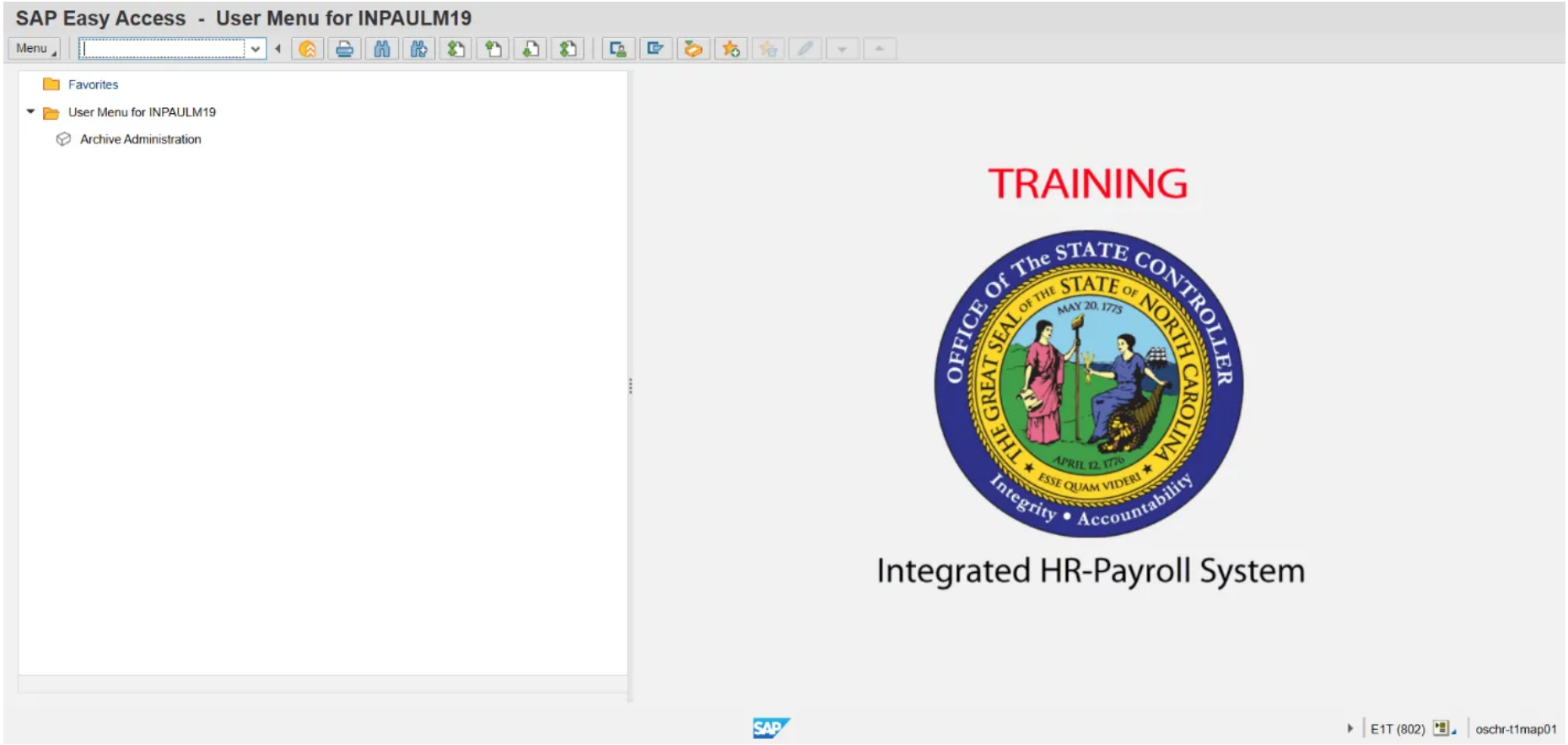
Access Transaction

Via Transaction Code: ZPAA076; SWBP; PA40

Procedure

There are 51 steps to complete this process.

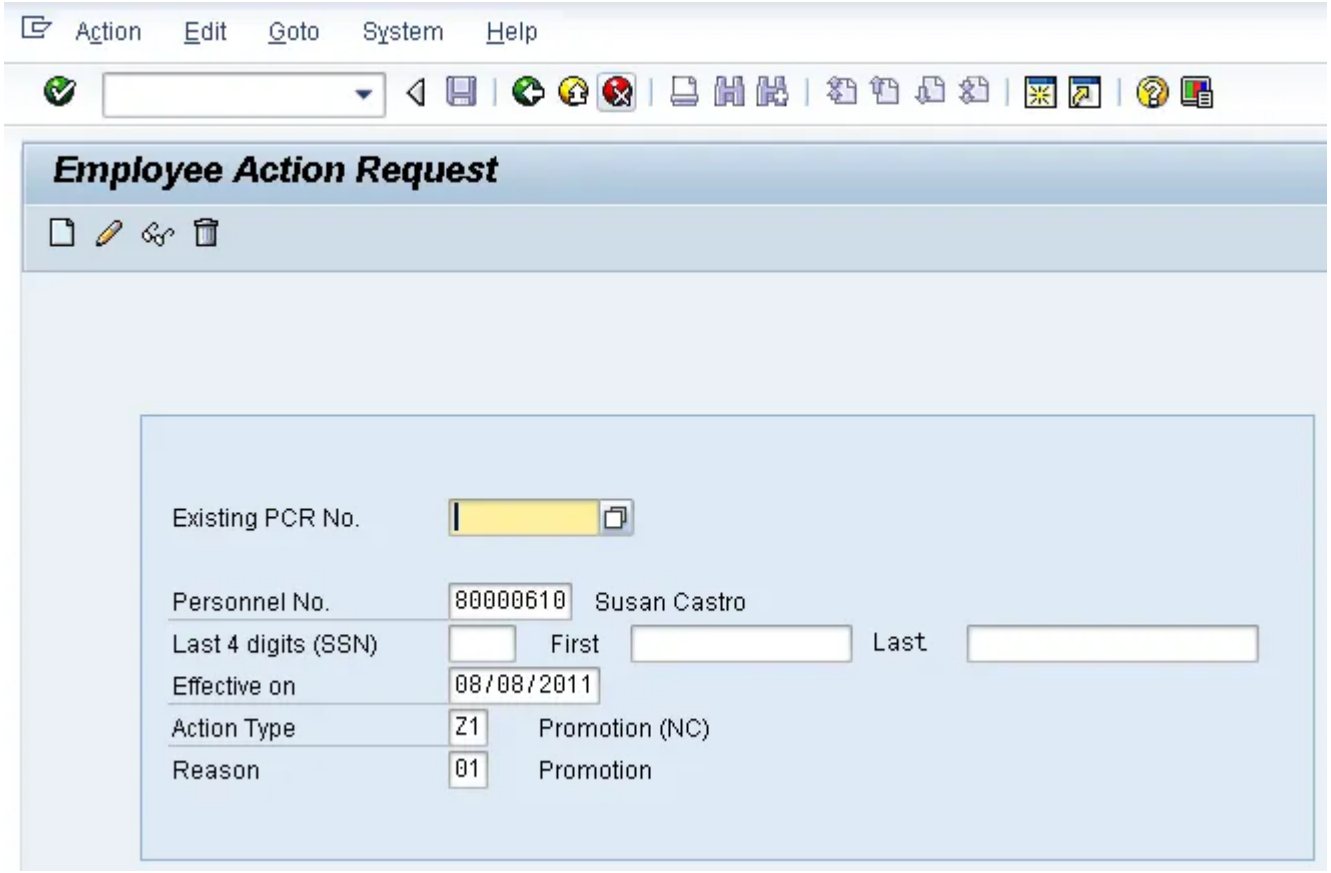
Image



Step 1. In the Command Field, enter transaction code **ZPAA076**.

Step 2. Click the **Enter** button.

Image



Step 3. Update the following fields:

- **Personnel No.**
  - Example: 80000610
- **Effective On:** The date on which the action will be effective.
- **Action Type:** An action is a grouping of activities to perform a specific task. The action will prompt you for the Infotypes required to complete the task.
  - Example: Z1
- **Reason:** Reason for the action, such as Promotion

- Example: 01

Step 4. Click the **Enter** button.

Enter the Personnel Number of the individual to be Promoted. Click Enter to retrieve the name of the individual and verify that the Personnel Number is correct.

Note: Only enter the SSN and name for New Hires.

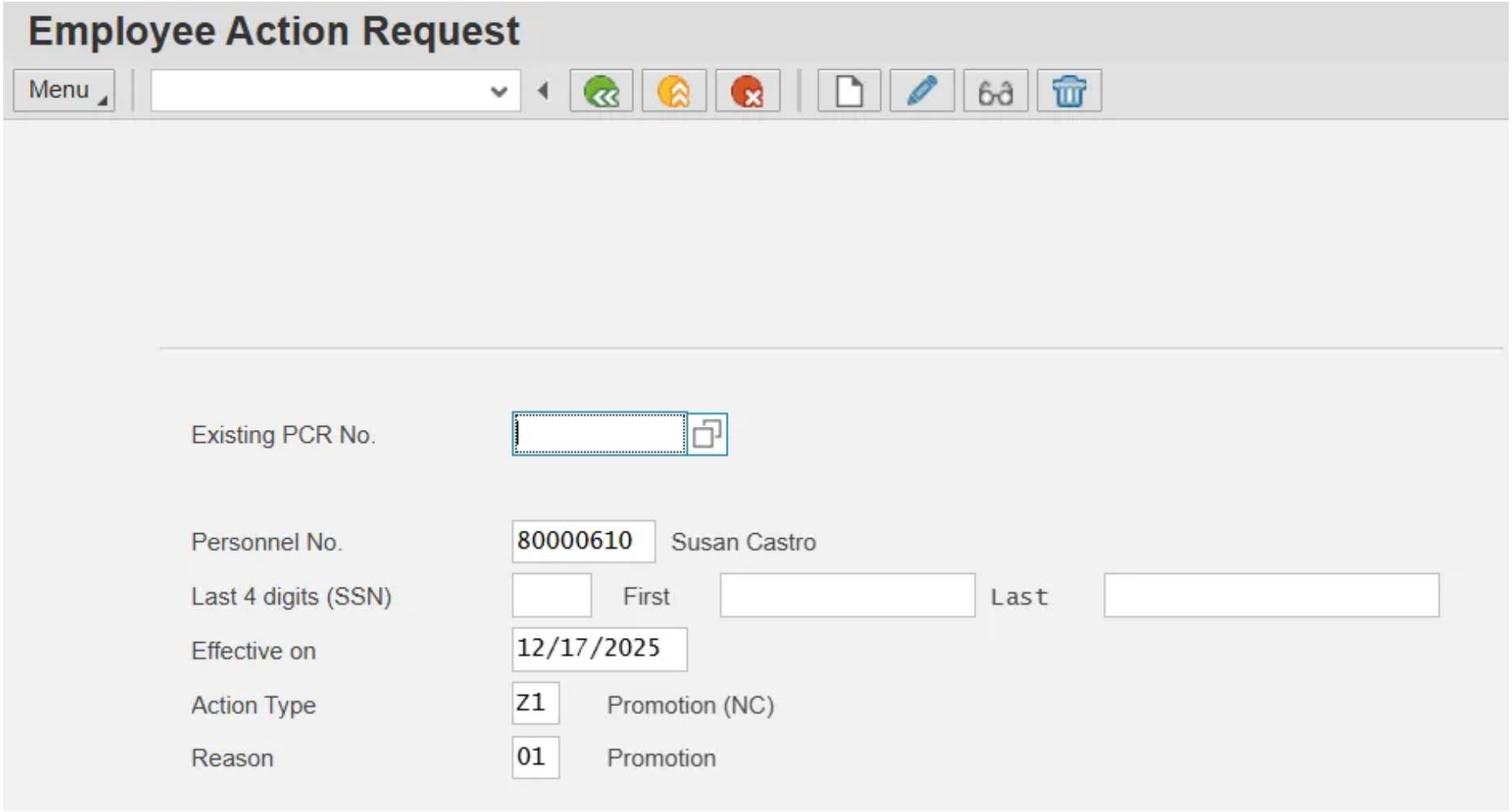
If you need to look up the personnel number, click your cursor in the field and click on the matchcode search button to the right of the field for search options.

The system defaults the current date, but you can change the date to a day in the past or in the future.

There are several available Reasons from which to choose. For specific information on each reason, view the business process overview section at the beginning of these instructions.

Click **Enter** and verify the information is correct before proceeding.

Image



Step 5. Click the **Create (F5)** button.

If the information is correct, click **Create** to begin the process.

Leave the Existing PCR No. field blank if you are creating a new PCR.

Several fields on this screen are mandatory. The system will not let you continue if you have not provided data for the mandatory fields. If you are unsure which fields are mandatory, click **Enter**, and the system will prompt you for information in the mandatory fields.

Image



Employee Action Request

Initiate WF

PCR Number

Personnel Number 80000610 Susan Castro — Action: Z1 Promotion (NC)

Last 4 digits(SSN) — Reason: 01 Promotion

Effective on 08/08/2011 — Chng — St :

	CURRENT		PROPOSED	
Pers.Area	4601	Cultural Resources	4601	Cultural Resources
Subarea	NC01	7day Norm	NC01	7day Norm
EE Group	A	SPA Employees	A	SPA Employees
EE Subgroup / EE Subgrp	A1	FT N-FLSAOT Perm	A1	FT N-FLSAOT Perm
Org. Unit	20010310	CR CDS A&H MOH Design Sec	20010137	CR CDS A&H HIS RES Resear
Job	30001528	Museum Specialist	30001497	Research Historian
EE Position	65001875	Lighting And Interactive Design…	60083310	Research Historian

Basic Pay

	CURRENT		PROPOSED	
Pay Scale type	01	Graded	01	Graded
Pay Scale Area	01	Annual Salaries	01	Annual Salaries
Pay Scale Group	GR66	Level GR	GR68	Level GR
Annual Salary	31,959.00	Hrly Sal 0.00	35,154.90	Hourly Salary
	Calc Step - 0		Calc Step - 0	10.00
			Min	35,337.00
			Max	56,330.00
			Next Inc Date	

Dates

Last day worked

Step 6. Update the following fields:

- **EE Position**: New position number assigned to the employee
- **Annual Salary**: Employee's annual basic pay

Step 7. Click the **Enter** button.

Enter the Position number that the individual is being promoted into, and their new salary or hourly rate. Click **Enter** to validate the data.

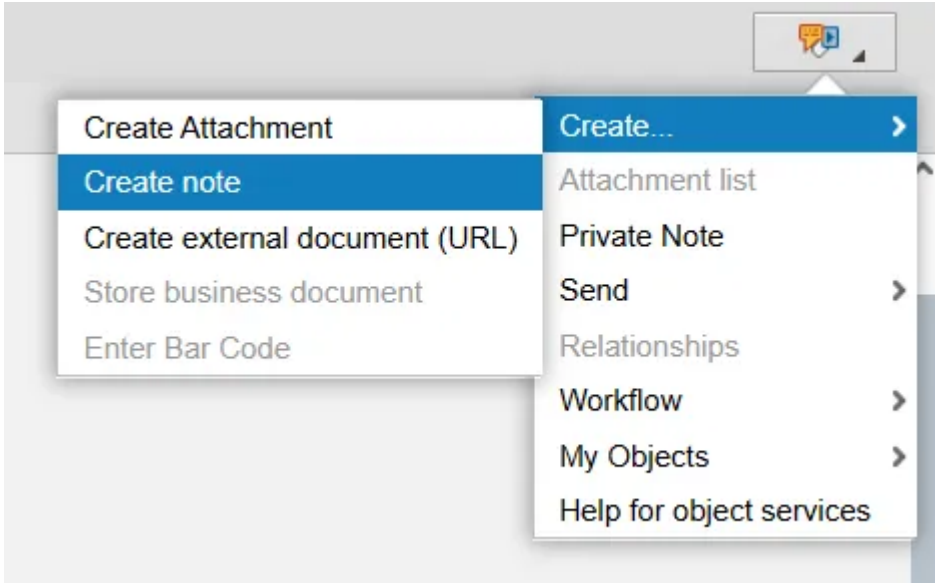
Step 8. Click the **Save (Ctrl+S)** button.

Click **Save** to save the data and receive a PCR number. The PCR has not been submitted to workflow yet.

Step 9. Click the **Continue (Enter)** button.

You can save this information as many times as you like. Each time you will receive a confirmation of the save. You will not be able to create a note attachment until you have saved it at least once. If you have already submitted the PCR to workflow, you will not be able to change the details, nor save any new information, only display the existing details.

Image



Step 10. Click the **Services for Objects** button.

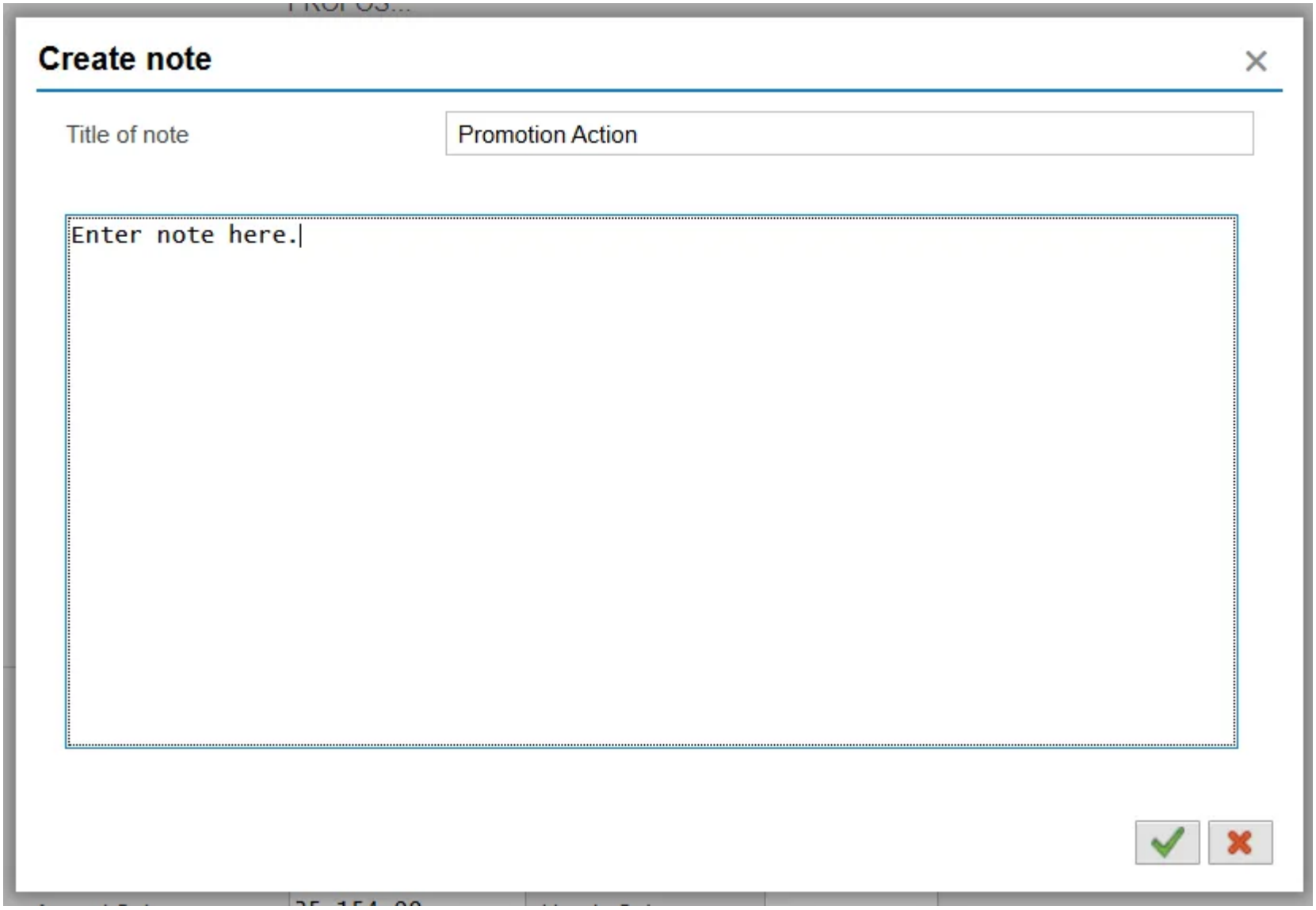
Step 11. Click **Create... >> Create note**.

You can enter any information that would be useful to the approvers downstream using the notes area, or attachment area. If you just need to type some information in, or copy and paste from an email, create a note. If you want to add a document as an attachment, use the attachment area.

This note and attachment area gets attached to this specific PCR only. It will follow the PCR through the approval/rejection process and live with the PCR into the future. When the PCR has been approved, and you are processing the Action (such as a New Hire action), you will need to recreate any notes or attachments if they need to be attached to the Action record as well.

Notes entered during PA Workflow must follow OSHR's Action Notes Template:

Image



Step 12. Update the following fields:

- **Title of note**: The short text to act as the title of the attachment

    - Example: Promotion information
- **Long text**
    - Example: appropriate information using OSHR’s Action Note template.

Step 13. Click the **Copy (Enter)** button.

Step 14. Click the **Enter** button.

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

Step 16. Click the **Initiate WF** button.

Select the **Initiate Workflow** button to send the Promotion 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).

Step 17. Click the **Continue (Enter)** button.

Step 18. Click the **Back (F3)** button.

Step 19. The Initiate Promotion Action is complete.

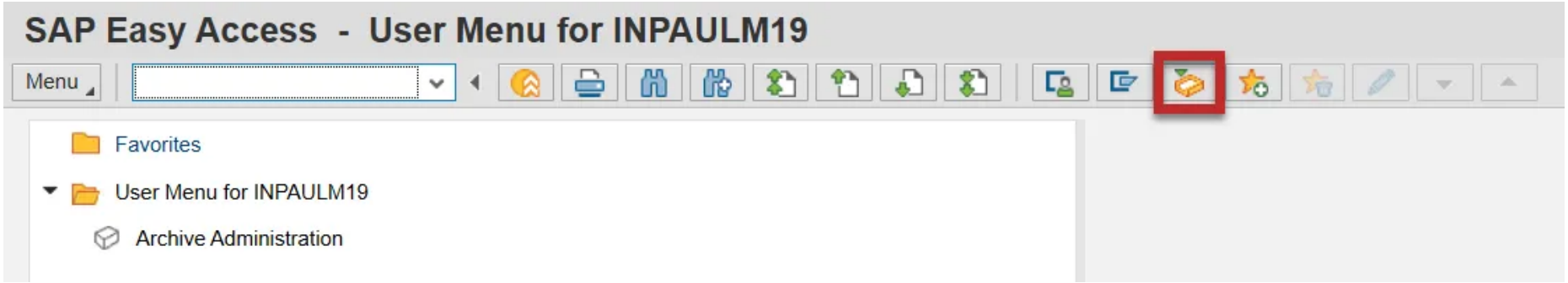
After Workflow Approvals have been received, process with the Complete Promotion Action process.

Instructions for Completing the Action

Access Transaction

Via Transaction Code: SBWP

Image



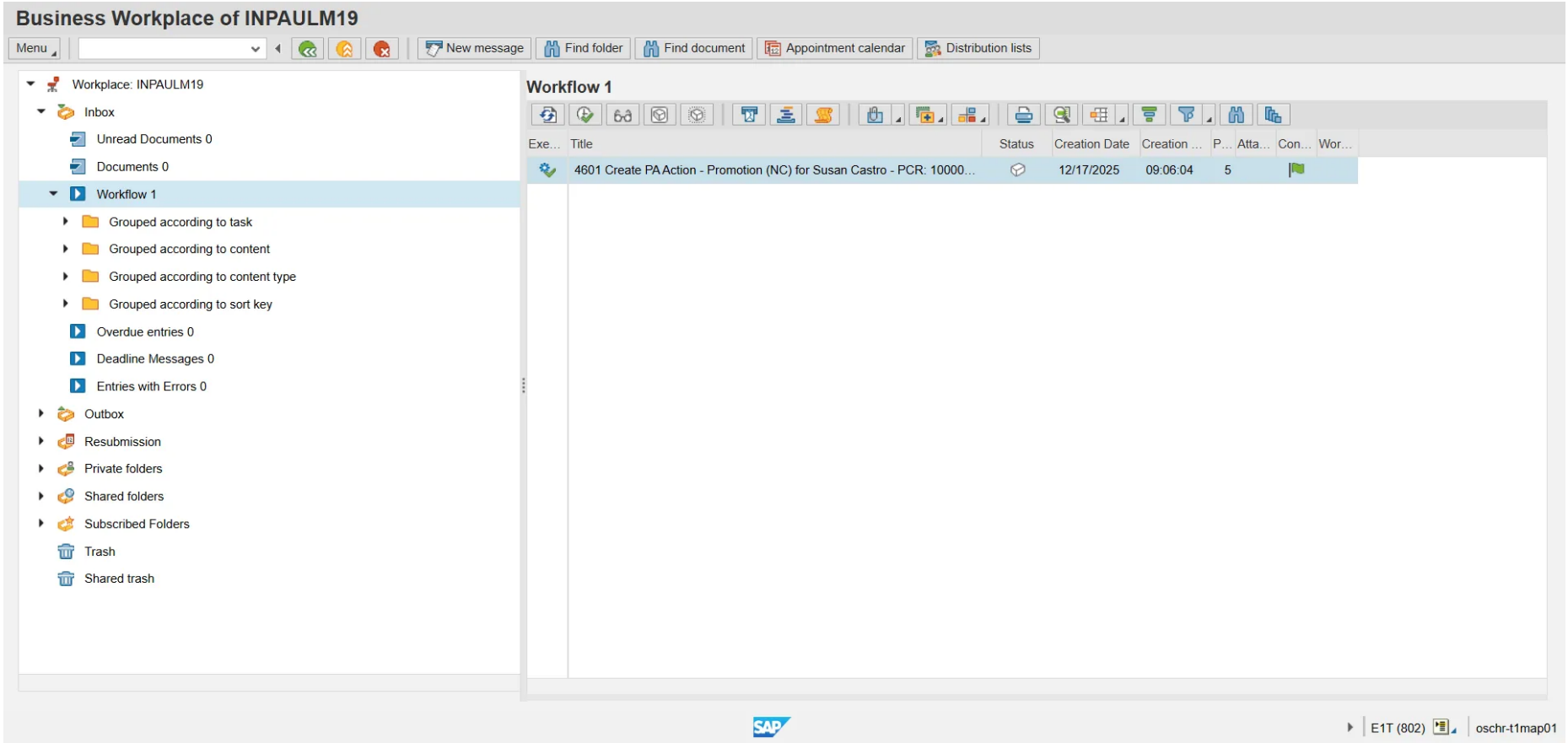
Step 20. Click the **SAP Business Workplace (Ctrl+F12)** button.

These instructions assume you have already initiated the Promotion Personnel Change Request (PCR) in workflow, and you have an approved PCR ready to be processed as a Promotion in the system.

Step 21. Select **Inbox >> Workflow**.

Step 22. The approved PCR will appear in the workspace. Before processing the Action, you must have a copy of the note that you created when you initiated workflow. For directions on how to get a copy of this note, refer to the help doc. PER-57 Copying Notes from the PCR to Infotypes.

Image



Step 23. Select the **PCR** row.

Step 24. Click the **Execute (F8)** button.

A list of your approved (or rejected) PCRs are listed on the right side of the screen. Select the PCR to be processed and click Execute (or double-click the PCR). You can view the PCR details and/or Workflow Tracker details prior to executing the PCR if desired. Once executing the PCR, the Promotion action will be launched.

Image

Personnel Actions

Menu

Back (F3)

Personnel no. 80000610

Name Susan Castro

EEGroup A SHRA Employees

EESubgroup A1 FT N-FLSAOT Perm

From

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)			

Step 25. Update the following field:

- **From**: Effective date of the personnel action

Step 26. Highlight **Promotion (NC)** action type.

Step 27. Click the **Execute (F8)** button.

The effective date is the date the Promotion will go into effect.

Image

Copy Actions (0000)

Menu | Execute info group

Pers.No. 80000610

Name Susan Castro

EEGroup A SHRA Employees PersA 4601 Natural and Cultural Resources

EESubgroup A1 FT N-FLSAOT Perm

Start 12/17/2025 to 12/31/9999

Personnel action

Action Type: Z1 Promotion (NC)

Reason for Action: 01 Promotion

Status

Customer-specific:

Employment: 3 Active

Special payment: 1 Standard wage type

Organizational assignment

Position: 60083310 Research Historian

Personnel area: 4601 Natural and Cultural Resources

Employee group: A SHRA Employees

Employee subgroup: A1 FT N-FLSAOT Perm

Step 28. Click the **Enter** button.

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

Notice at the top of this screen the title includes the word “Copy.” This action takes the original action and makes a copy of it, delimiting the previous record and saving the new record. The word “Create” in the title indicates that this infotype is being created on this person's record for the first time.

When the employee subgroup is different from the position employee subgroup you will receive a warning message. Click **Enter** to continue.

Step 29. Click **Menu > Edit > Maintain text**.

To add your comment based on agency or OSHR Policy/Guidelines. Remember you can cut and paste from the PCR.

Step 30. Click the **Enter** button.

Step 31. Click the **Save (Ctrl+S)** button.

Image

Create Organizational Assignment (0001)

Menu | Org Structure

Personnel No	80000610		Name	Susan Castro	
EEGroup	A	SHRA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active	
Start	12/17/2025	to	12/31/9999		

Enterprise structure

CoCode	NC01	STATE OF NC			
Pers.area	4601	Natural and Cultural Resources	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	A1	FT N-FLSAOT Perm	Contract		

Organizational plan

Percentage	100.00	Assignment
Position	60083310	201000002039
		Research Historian

Step 32. Click the **Enter** button.

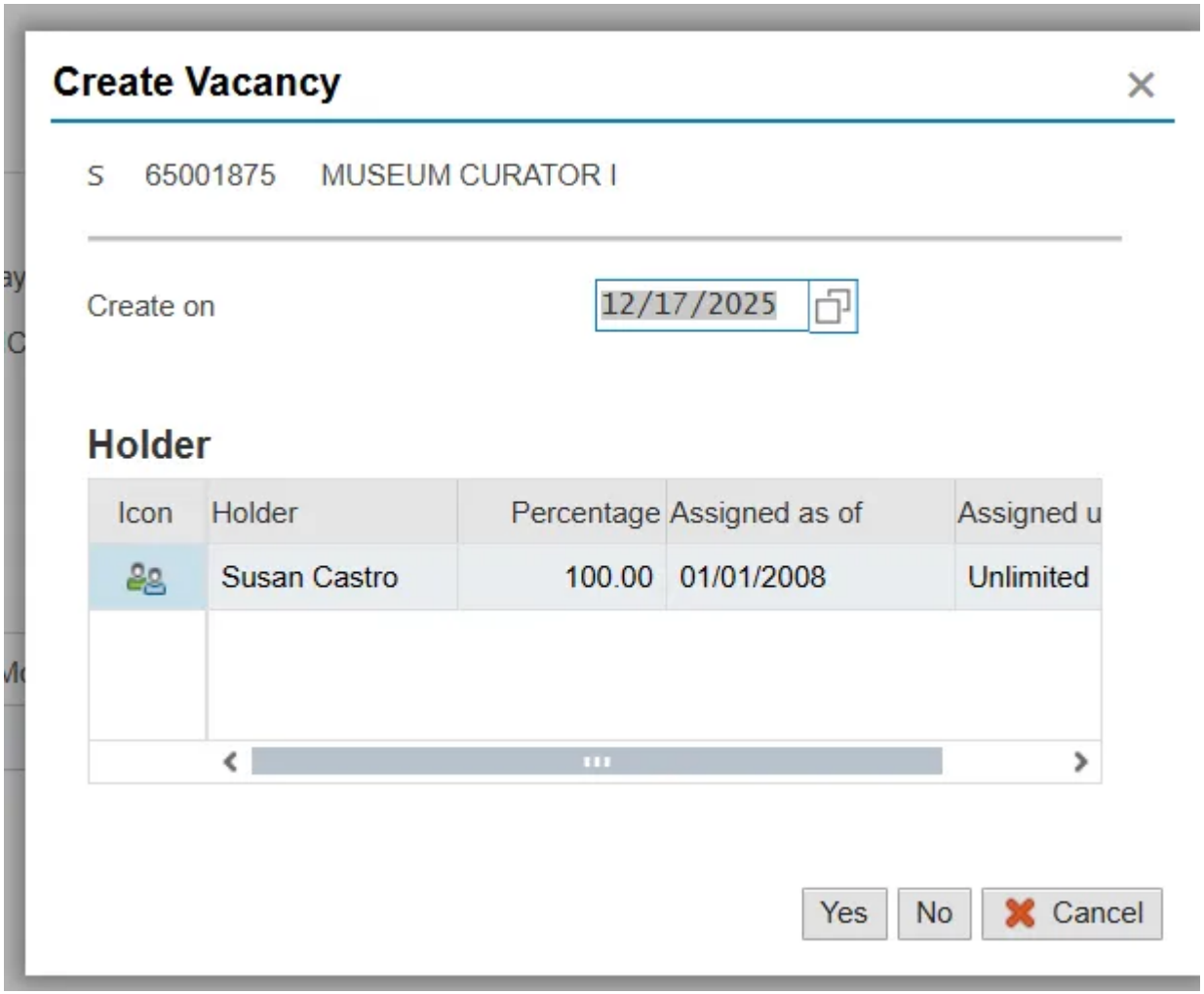
Enter the Contract if required. The Contract key identifies eligibility for Medicare, less than 5 yrs for STD, and the Rehire of Retiree statuses.

If the contract field is completed on the previous IT0001, it will copy to the new IT0001.

Step 33. Click the **Save (Ctrl+S)** button.

Step 34. The system will display a yellow warning message informing you the existing record will be delimited. Click **Save** to move passed this warning message.

Image



Step 35. Create Vacancy: Click the **Yes** button.

Click **Yes** to create a vacancy in the position from which the individual is leaving.

Step 36. Delimit Vacancy: Click the **Yes** button.

Click **Yes** to delimit (put an end date to) the vacancy of the position into which the individual is being promoted. If you click **No**, the position will show up as unoccupied on vacancy reports.

Note: Use PO13D to review infotype 1001, B008 holder relationship was delimited or created. IT1007 Vacancy – controls whether it shows up on the BI Report correctly.

Image

Create Related Experience (9822)

Menu

Personnel No	80000610	Name	Susan Castro		
EEGroup	A	SHRA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active	
Start	12/17/2025	to	12/31/9999		

(Not to be used for Supplemental Staff)

Classification

Position	60083310	201000002039 Research Historian
Job	30001497	Resrch His Research Historian

Related Work Experience

Months		Calculated Months:	0

Step 37. Click the **Enter** button.

Best practice is to enter any data as appropriate, review all data, and click Enter to allow the system to validate the data.

Step 38. Agency representative will need to enter the following fields:

- Related Work Experience
- Related Education Months

Step 39. Click the **Save (Ctrl+S)** button.

Image

Create Planned Working Time (0007)

Menu | Work schedule

Personnel No	80000610		Name	Susan Castro	
EEGroup	A	SHRA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active	
Start	12/17/2025		To	12/31/9999	

Work schedule rule

Work schedule rule	D01N08GN	MTWHF-8,SaS-O
Time Mgmt status	1 1 - Positive Time Recording	
Working week	06 Wk - Sat (mdnt) - Fri	

WSR Finder

☐ Part-time employee

Working time

Employment percent	100.00
Daily working hours	0.00
Weekly working hours	
Monthly working hrs	0.00
Annual working hours	0.00
Weekly workdays	

Step 40. Click the **Enter** button.

Adjust their work schedule as appropriate and save the data.

The Work Schedule Rule and Time Mgmt status defaults from the employee's enterprise structure. It is critical that you review for correctness (including the working week) and change the work schedule as appropriate for the employee if it is different from the one that defaults.

If the individual is part-time, be sure to check the Part-time employee box and verify the working hours are less than 40.
The defaulted work schedule is based on information provided by the various agencies and Integrated HR-Payroll System team members.

Note: Subject employees must be positive time. Employment percent always should be 100%.

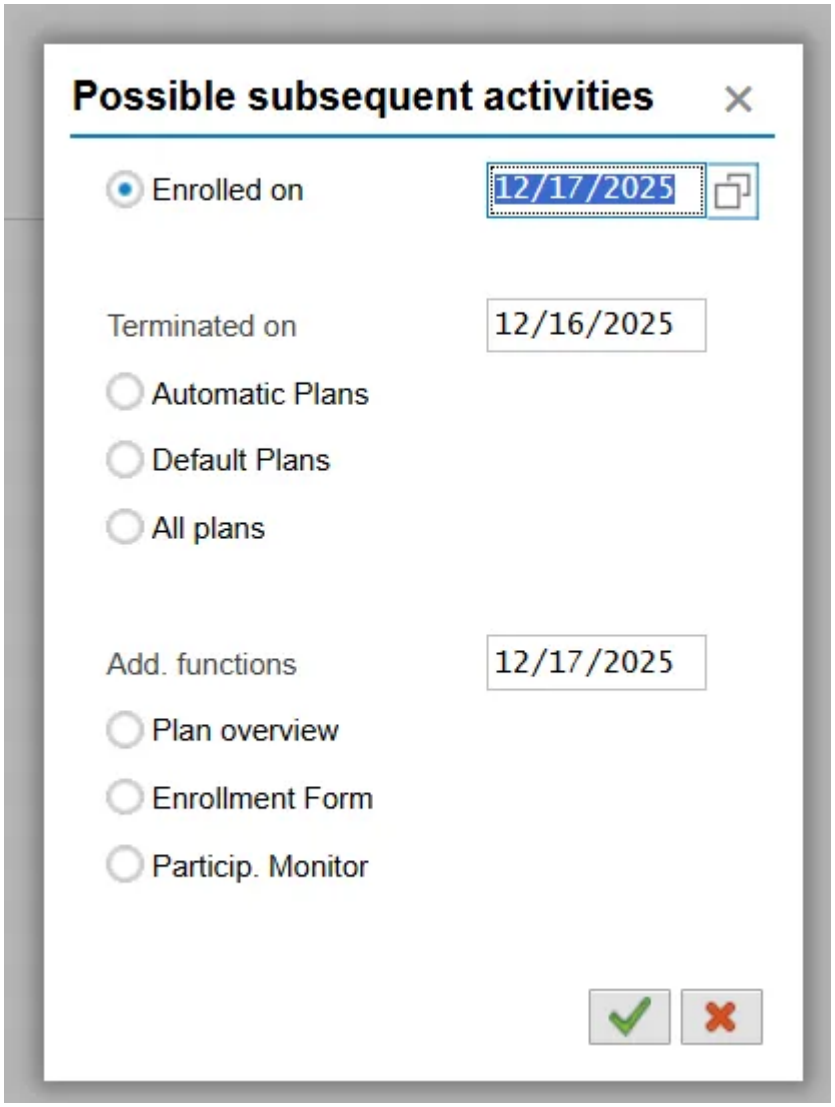
Step 41. Click the **Save (Ctrl+S)** button.

Notice that when you change the details on the working time infotype, the system reminds you to also manage IT0008, Basic Pay.

Step 42. Click the **Enter** button.

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

Image



Subsequent activities should be completed only if the employee is being promoted to a position in a different retirement system than his or her current position (for example – going from TSERS to LEORS).

Step 44. Click the **Cancel (F12)** button.

If you do not need to make changes to the benefits of the individual, click **Cancel** to bypass this infotype.

Image

Create Basic Pay (0008)

Menu | Salary amount | Payments and deductions

Personnel No	80000610	Name	Susan Castro		
EEGroup	A	SHRA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active	
Start	12/17/2025	o	12/31/9999		

Subtype 0 Basic contract

Salary

Reason			Cap.util.lvl	100.00	
PS type	01	Graded	WkHrs/period	173.33	Monthly
PS Area	01	Annual Salaries	Next inc.		
PS group	GR68	Level 00	Ann.salary	35,154.90	USD

Wag…	Wage Type Long Text	O…	Amount	Curre…	In…	A…	Number/Unit	Unit
1000	Regular Salary		2,929.58	USD		☑		

IV 12/17/2025 – 12/31/9999 0.00 USD

Step 45. Update the following field:

- **Reason**: Reason for the action, such as Promotion.

Step 46. Click the **Enter** button.

The pay scale values (pay scale type, pay scale area, pay scale group and level) have been designed to default based on the rules assigned to the employee's position. If the pay scale values do not default, please contact BEST Shared Services or your BEST HR Specialist.

Enter the Reason Promotion (Z1), click Enter to validate the data. Notice the Annual Salary field has retrieved the amount submitted via workflow (or the hourly field is appropriated).

You will enter the hourly rate in the amount field manually; then press Enter and the annual salary automatically calculates.

Step 47. Click the **Save (Ctrl+S)** button.

Step 48. Click the **Back (F3)** button.

Step 49. Click the **Complete Item** button.

Only once all of the infotype screens within the action have been processed and the system has returned you to the main screen will this Complete button be visible. Now you may complete the PCR in workflow.

Step 50. Click the **Back (F3)** button.

You can remain in this SAP Business Workplace and process additional PCRs, or click the Back button to return to the main SAP screen.

Step 51. The Promotion Action is complete, but we recommend reviewing via PA20 all infotypes that have been processed.

First Published

Tue, 10/25/2011

Last Updated

Tue, 02/24/2026

Printable PDF