# PER-66 PA Workflow ZPAA076 Investigatory With Pay Action

## Purpose

The purpose of this Business Process Procedure is to explain how to process an Investigatory with Pay Action in the Integrated HR-Payroll System.

## Trigger

There is a need to process an Investigatory with Pay Action for one of the reasons listed in the Business Process Procedure Overview section.

## Business Process Procedure Overview

**Investigatory w/Pay** –to investigate allegations of performance or conduct deficiencies that would constitute just cause for disciplinary action; to provide time within which to schedule and conduct a pre-disciplinary conference; or to avoid disruption of the work place and/or protect the safety of persons property.

**Reasons:**

- **01 - Investigatory Placement Leave** - employee may be placed on leave for no more than 30 days.
- **02 - Extended** - requires written approval from Agency head and the State Human Resources Director.

## Tips and Tricks

- Prior to initiating any workflow, ensure the data being used is valid and appropriate.
- Ensure the following have been completed:
    - all timesheets have been entered, released and approved.
- As of 7/1/2013, the Investigatory Placement action requires A/A 9690 (Investigatory Leave) to be keyed for all scheduled workdays that fall within the effective dates of the action.  If a holiday falls within the effective dates of the action, A/A 9300 (Holiday Leave) should be keyed.  Leave codes other than A/A 9690 and A/A 9300 will error out in Time Evaluation for an EE on the Investigatory Placement (Z5) action.

# PROCEDURE

There are 17 steps to complete this process.

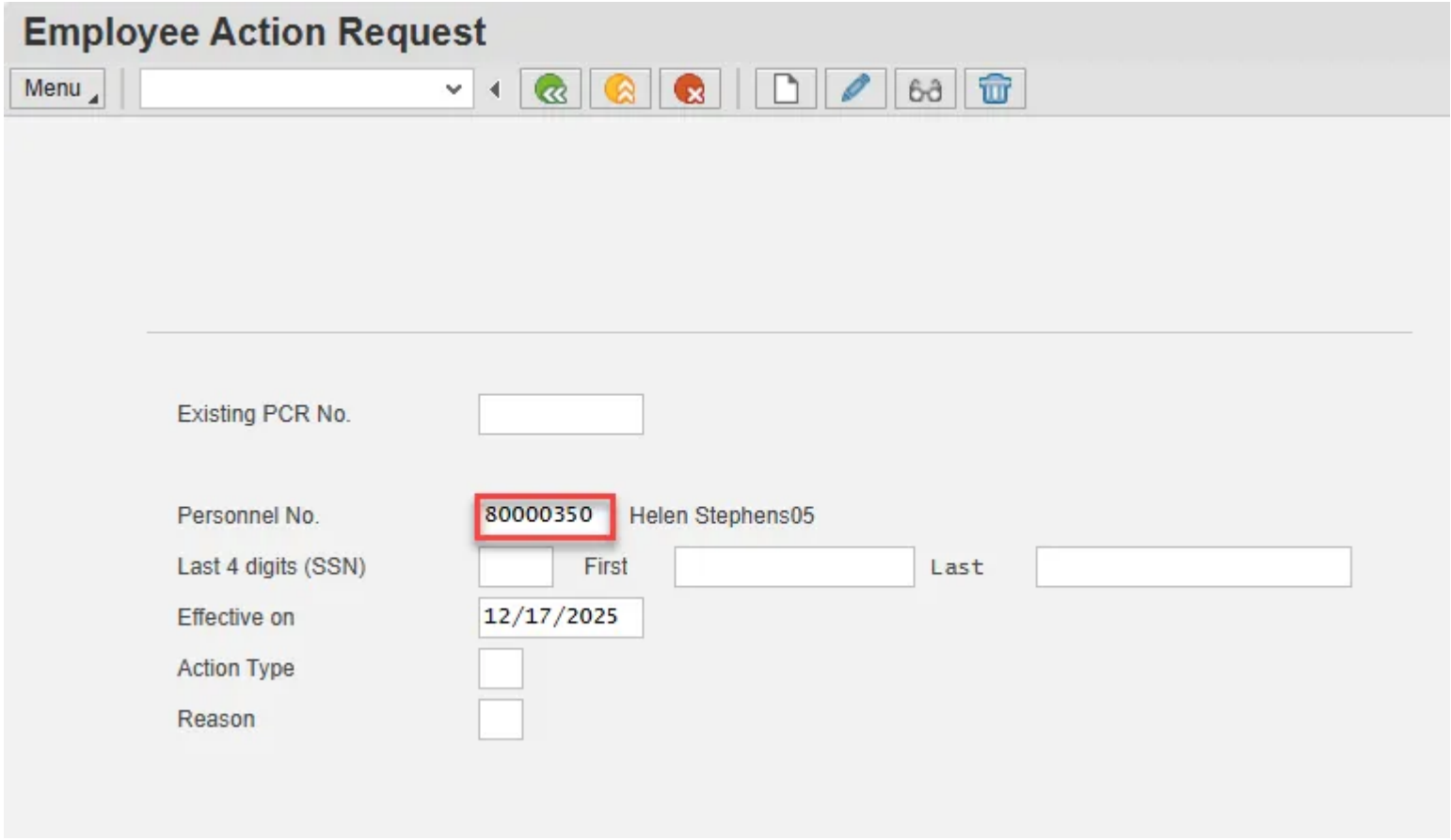
Step 1.  From the SAP Easy Access page, select transaction code **ZPAA076**.

Image



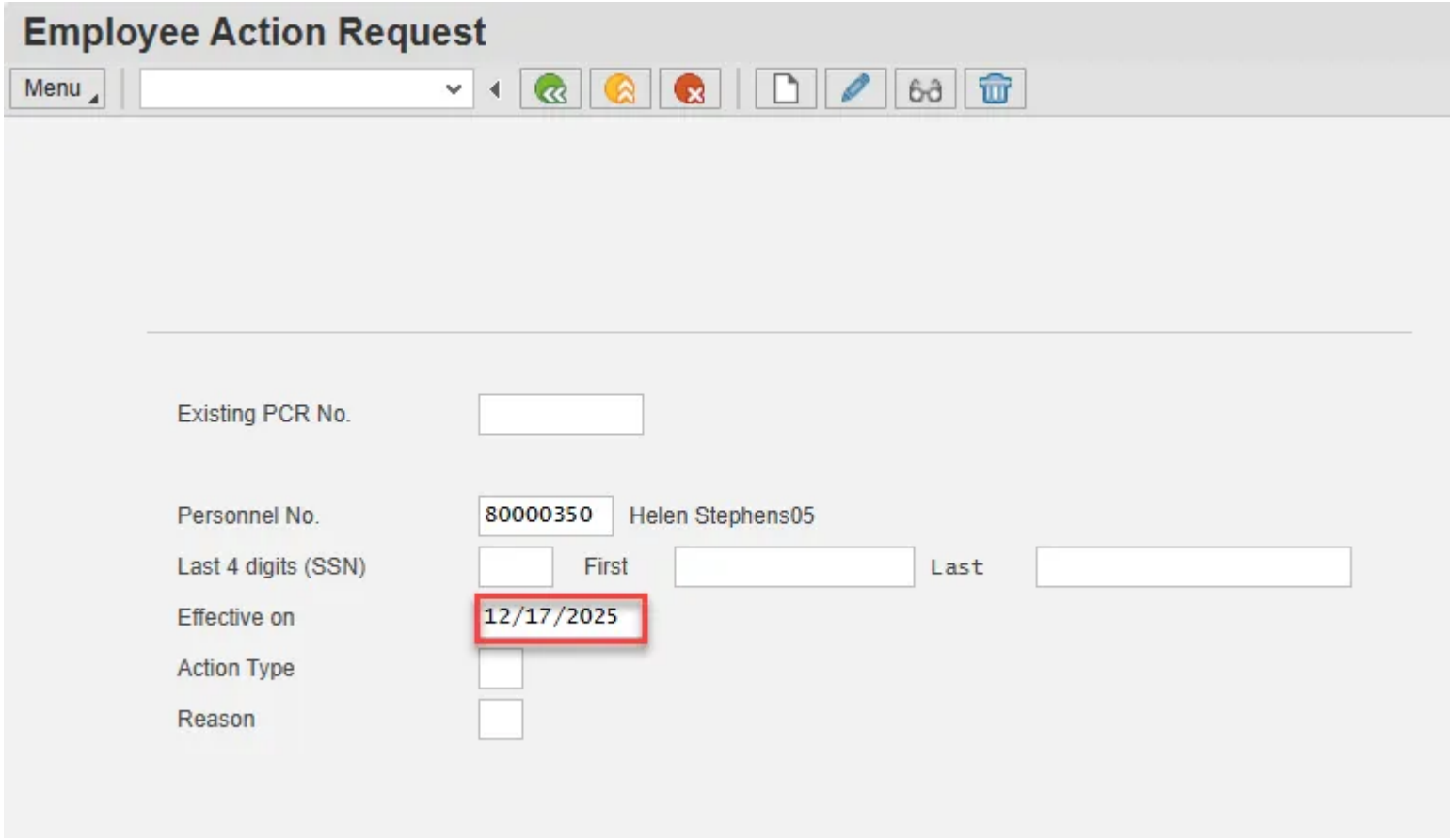

Step 2.  On the Employee Action Request screen, update the Personnel No. field and select **Enter** on the keyboard.

Image



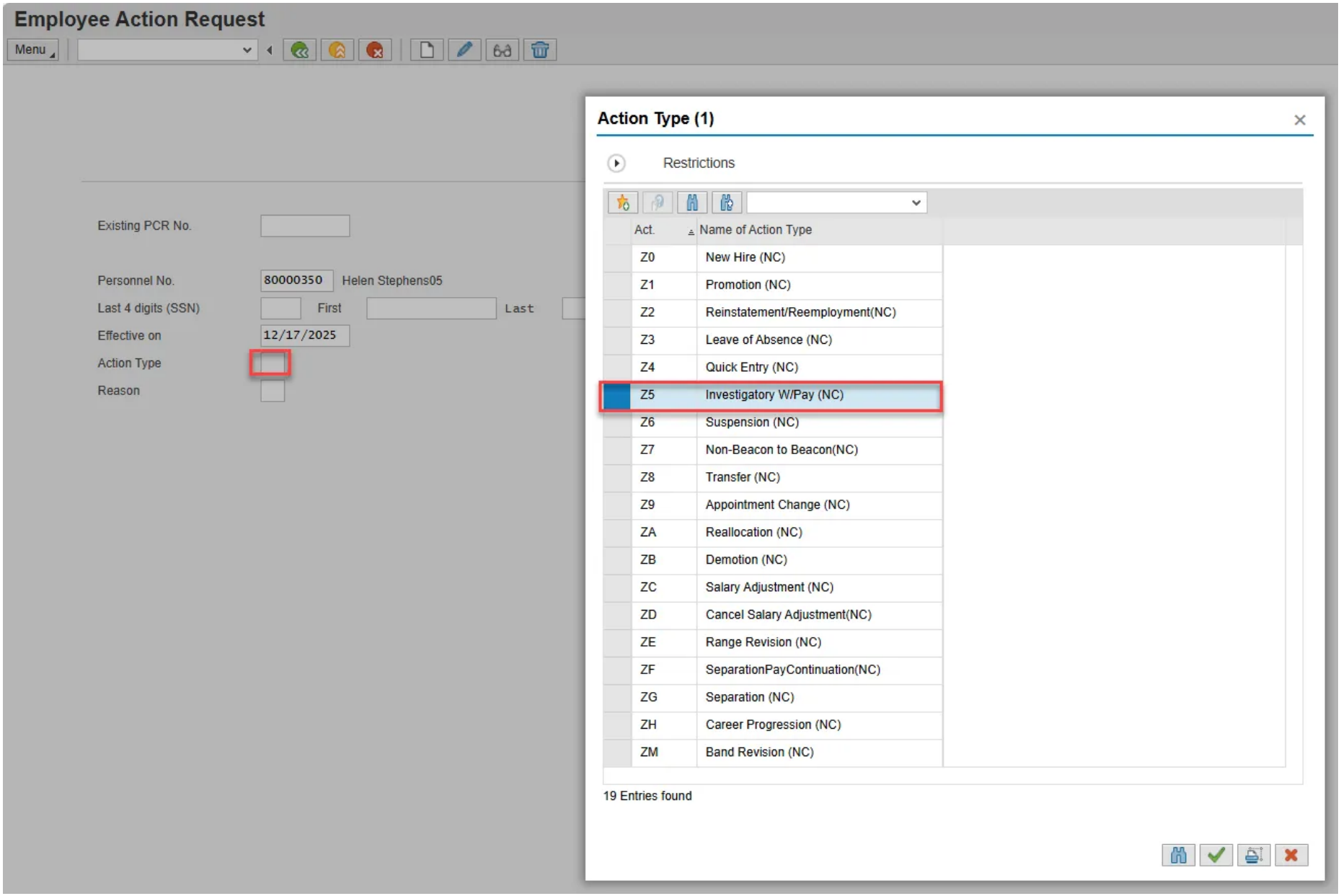

Step 3. Update the Effective on field with the correct effective date.

Image



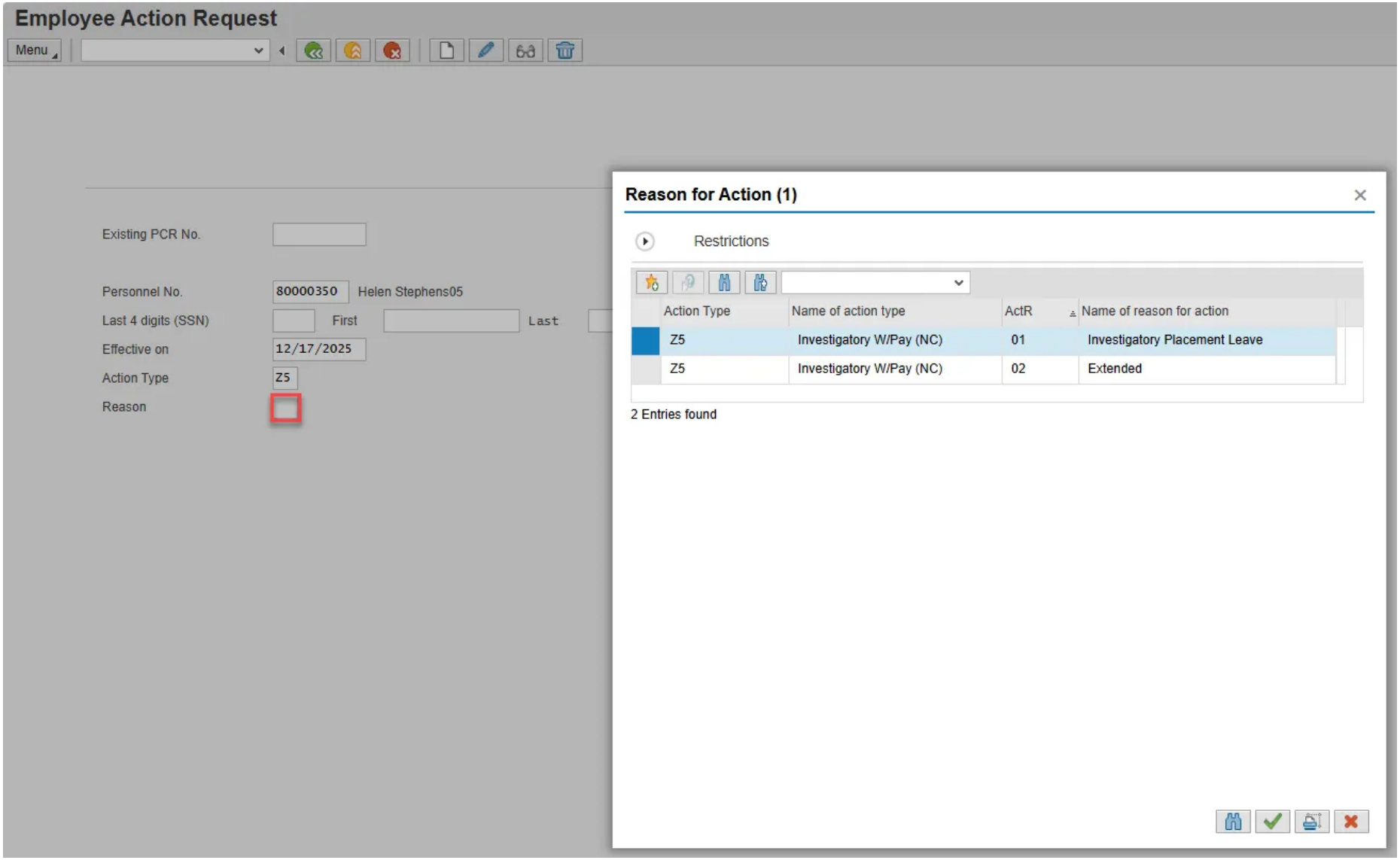

Step 4. Select the matchcode in the Action Type field and double click **Investigatory W/Pay** from the list.

Image


Employee Action Request
Menu
Existing PCR No.
Personnel No.
80000350
Helen Stephens05
Last 4 digits (SSN)
First
Last
Effective on
12/17/2025
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

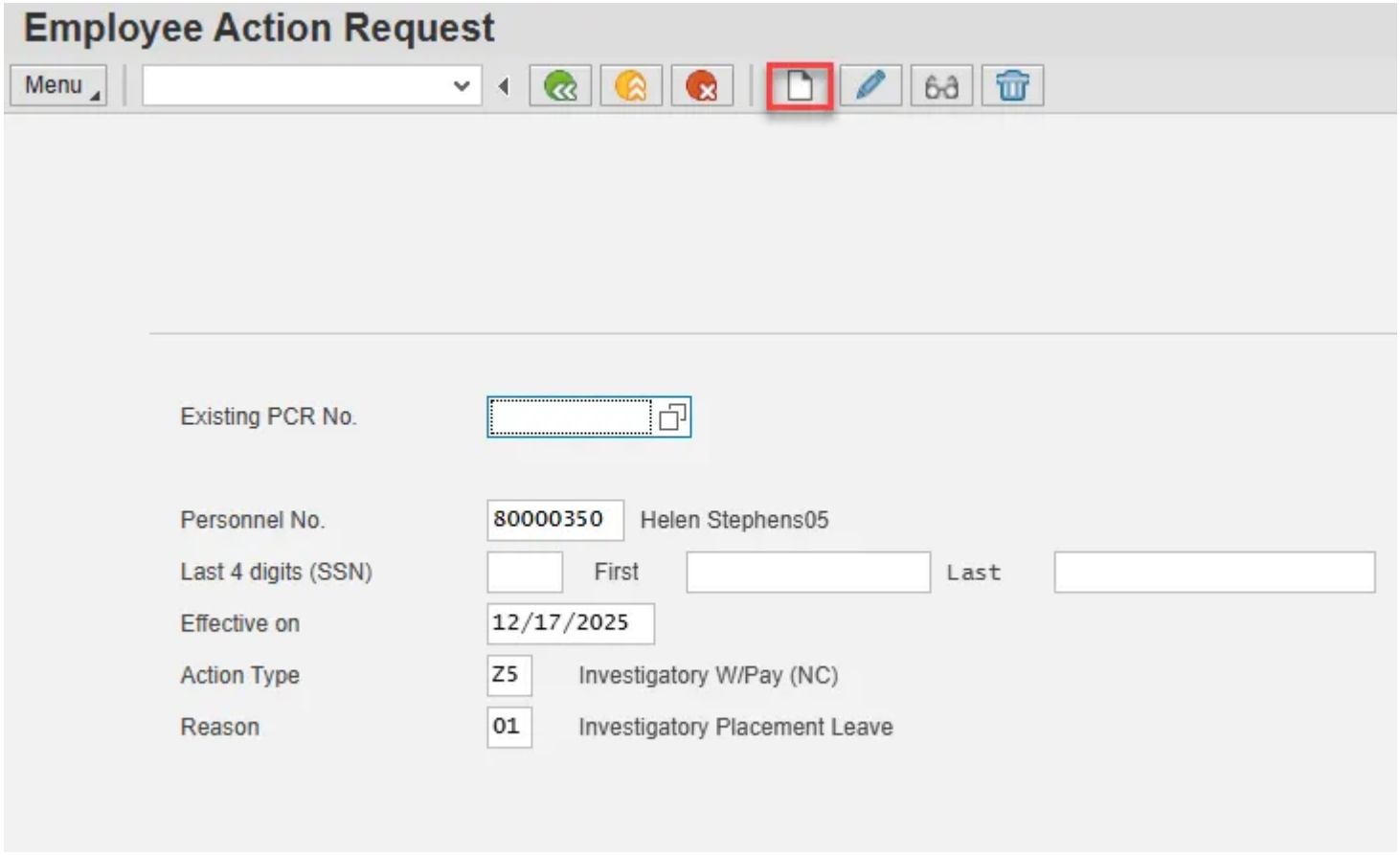
Step 5. Select the matchcode in the Reason field and double click the appropriate reason for the Investigatory action.

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 80000350 Helen Stephens05 Action: Z5 Investigatory W/Pay (NC)

Last 4 digits(SSN) Reason: 01 Investigatory Placement Leave

Effective on 12/17/2025 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 | B1 | FT S-FLSAOT Perm | B1 | FT S-FLSAOT Perm |
| Org. Unit | 20000237 | CR CDS MOA Deputy Directo | 20000237 | CR CDS MOA Deputy Directo |
| Job | 32000022 | Administrative Associate | 32000022 | Administrative Associate |
| EE Position | 65001517 | ADMINISTRATIVE ASSOCIATE II | 65001517 | ADMINISTRATIVE ASSOCIATE II |

## Basic Pay

| | | | | | |
|---|---|---|---|---|---|
| Pay Scale type | 07 General | | Pay Scale type | 07 General | |
| Pay Scale Area | 01 Annual Salaries | | Pay Scale Area | 01 Annual Salaries | |
| Pay Scale Group | GN05 | Level 02 | Pay Scale Group | GN05 | Level 02 |
| Annual Salary | 36,000.00 | Hrly Sal 0.00 | Annual Salary | 36,000.00 | Hourly Salary |
| | Calc Step - -MP | | | Calc Step - -MP | 0.00 |
| | | | Min | 33,069.00 | |
| | | | Max | 36,742.00 | Next Inc Date |

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

Image

# Employee Action Request

Menu | Initiate WF

PCR Number

Personnel Number 80000350 Helen Stephens05 Action: Z5 Investigatory W/Pay (NC)

Last 4 digits(SSN) Reason: 01 Investigatory Placement Leave

Effective on 12/17/2025 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 | B1 | FT S-FLSAOT Perm | B1 | FT S-FLSAOT Perm |
| Org. Unit | 20000237 | CR CDS MOA Deputy Directo | 20000237 | CR CDS MOA Deputy Directo |
| Job | 32000022 | Administrative Associate | 32000022 | Administrative Associate |
| EE Position | 65001517 | ADMINISTRATIVE ASSOCIATE II | 65001517 | ADMINISTRATIVE ASSOCIATE II |

## Basic Pay

| | | | | | |
|---|---|---|---|---|---|
| Pay Scale type | 07 General | | Pay Scale type | 07 General | |
| Pay Scale Area | 01 Annual Salaries | | Pay Scale Area | 01 Annual Salaries | |
| Pay Scale Group | GN05 | Level 02 | Pay Scale Group | GN05 | Level 02 |
| Annual Salary | 36,000.00 | Hrly Sal 0.00 | Annual Salary | 36,000.00 | Hourly Salary |
| | Calc Step - -MP | | | Calc Step - -MP | 0.00 |
| | | | Min | 33,069.00 | |
| | | | Max | 36,742.00 | 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.

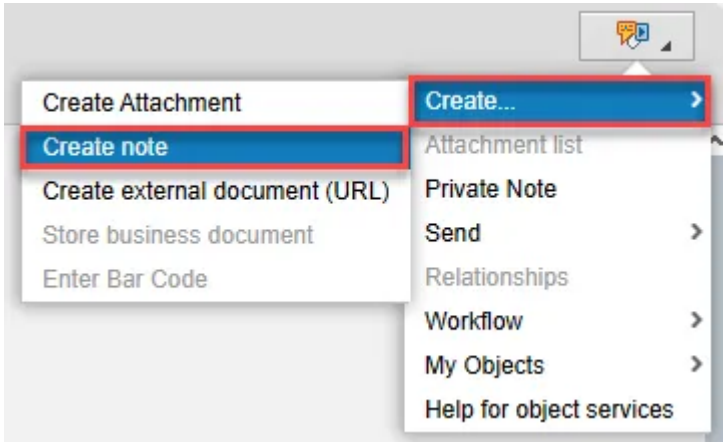
Step 10.  Select the **Services for Object** button in the upper right corner.

Image



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

Image

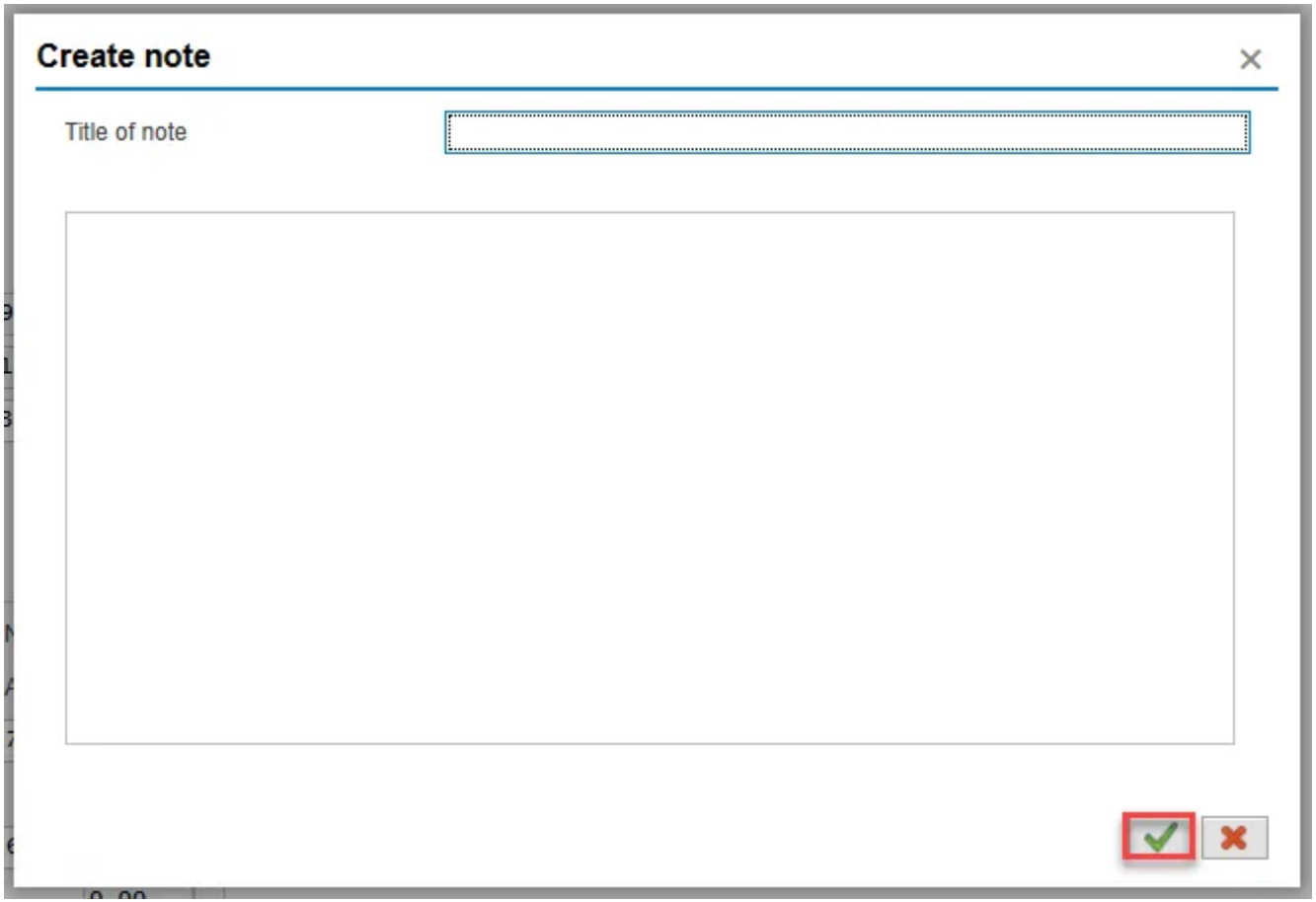



Step 12. Update the Title of note field and the body of the note.

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



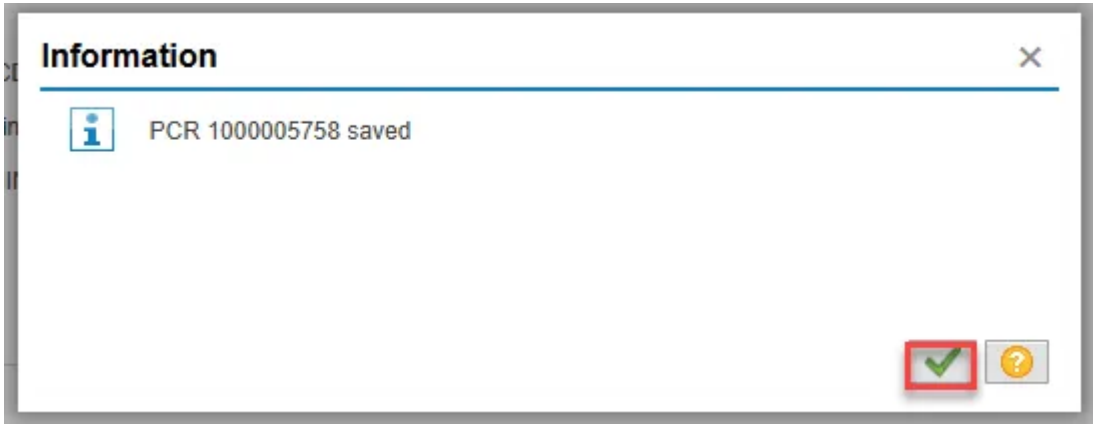

Step 13. Choose **Save**.

Image




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

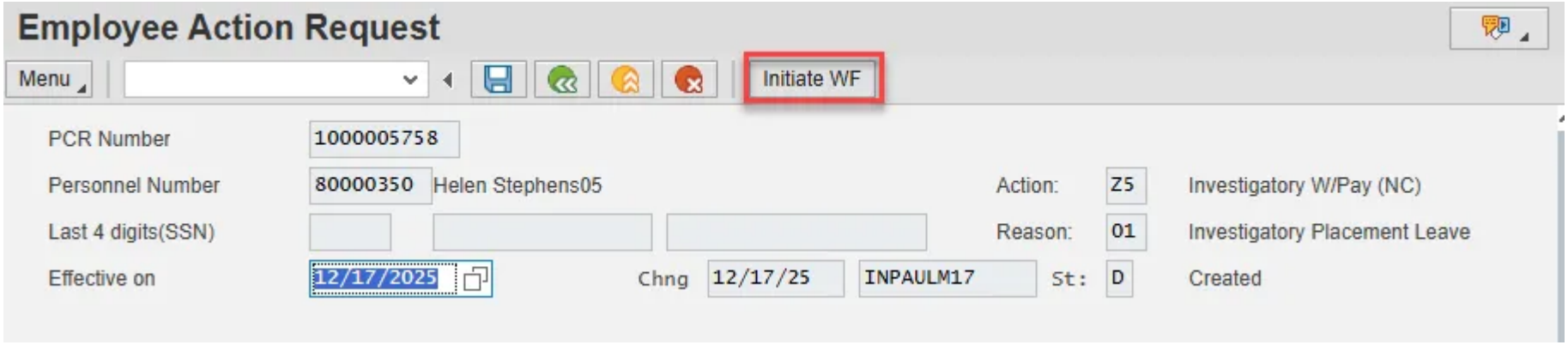
Image




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

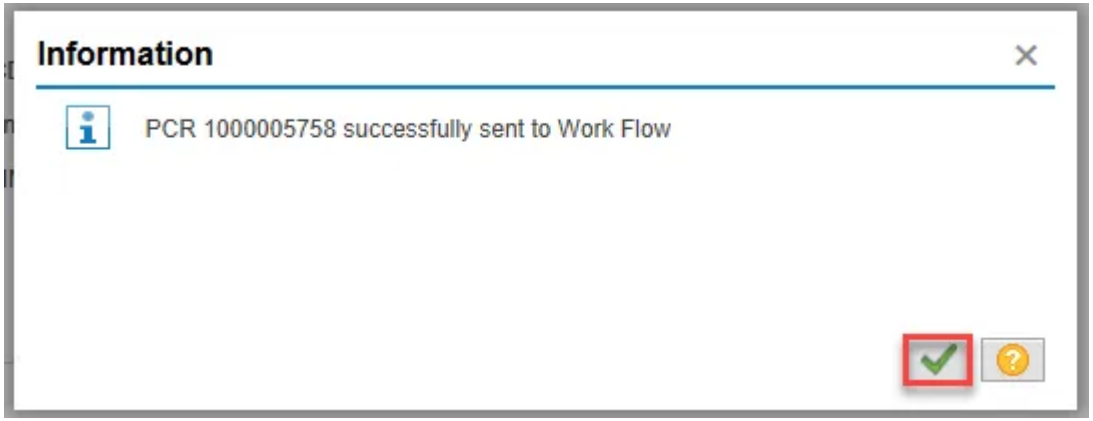
Select the Initiate Workflow button to send the Investigatory Action through the approval process. No changes can be made after the PCR has been submitted for approval, unless the PCR is rejected at any stage and sent back to you (the initiator/requestor).

Image



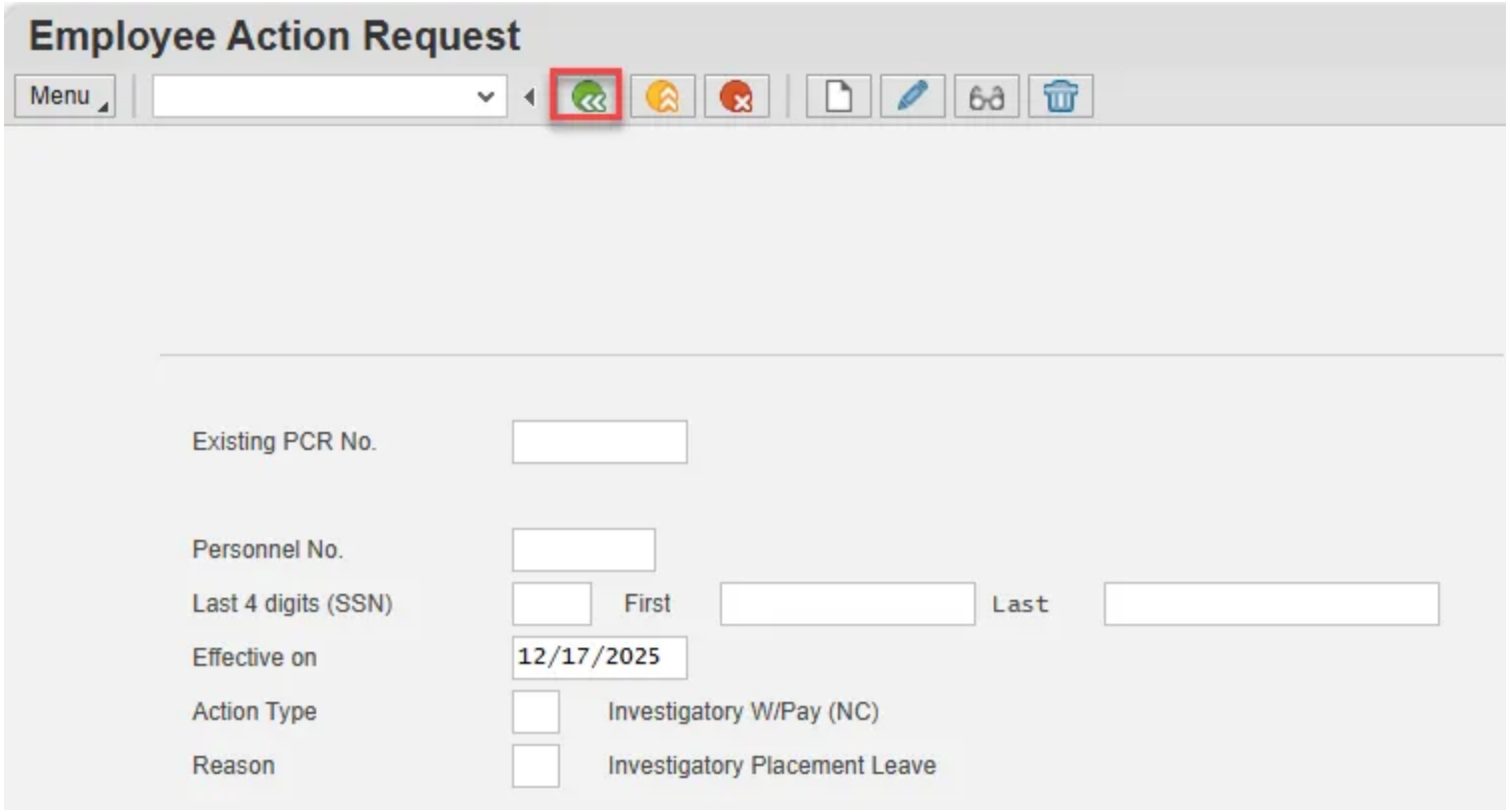

Step 16. Select the **green check button** in bottom right of the Information pop-up.

Image




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

Image



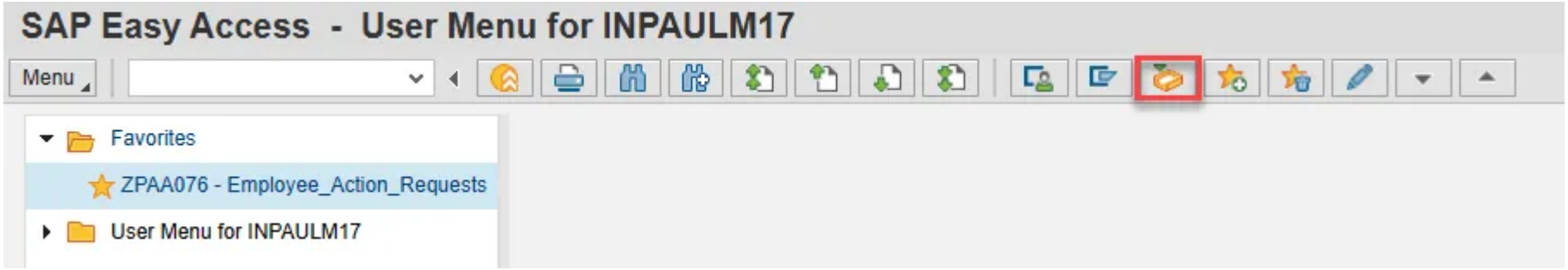

After Workflow Approvals have been received, proceed with the Complete Investigatory with Pay Action process.

# INSTRUCTIONS FOR COMPLETING THE ACTION

There are 18 steps to complete this process.

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

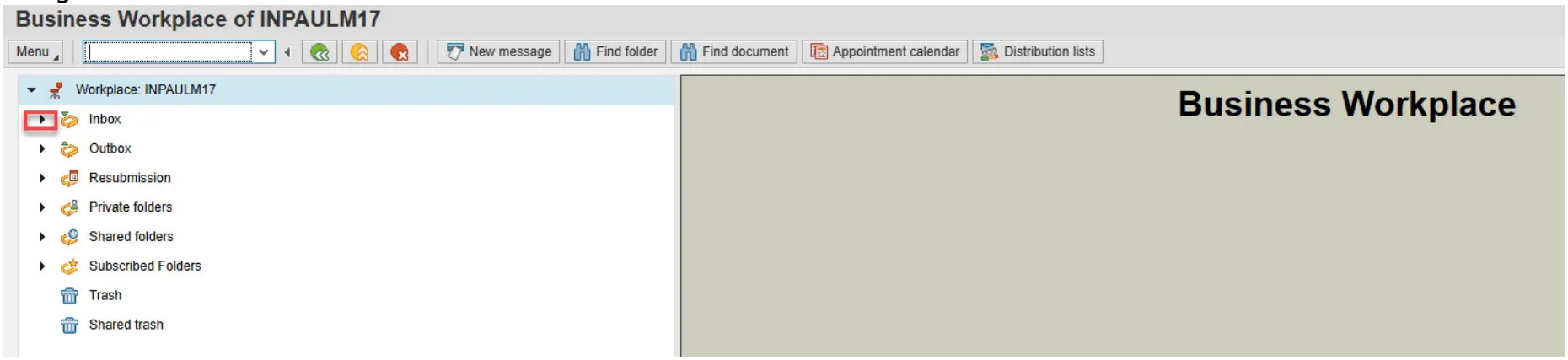
Image




Step 2. Expand the Inbox using the expand node.

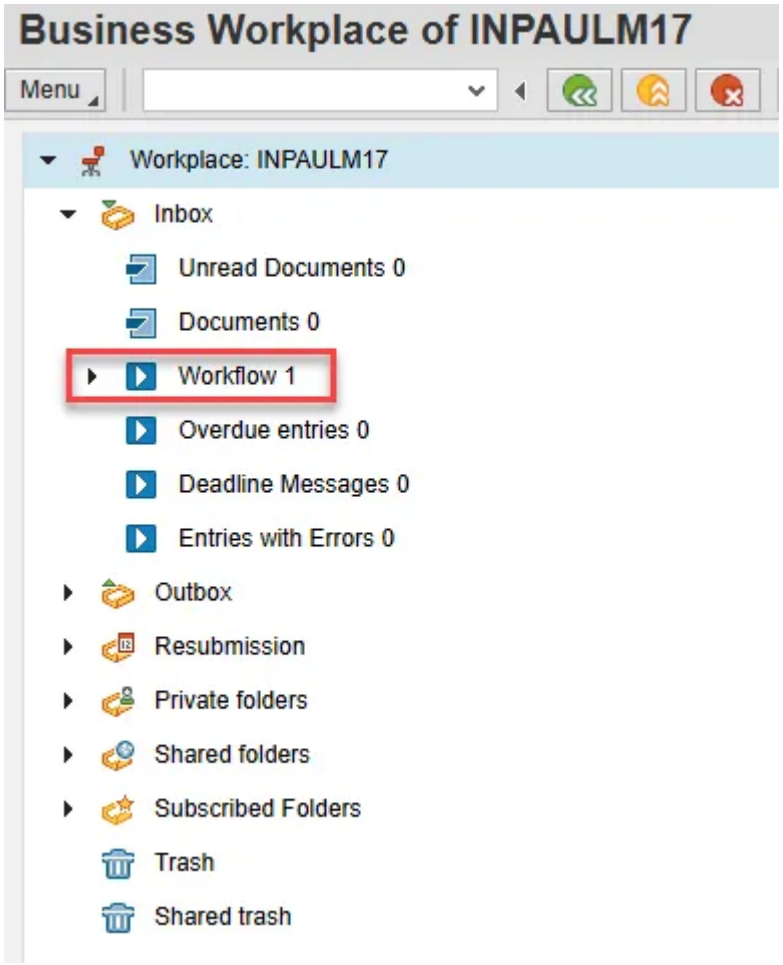
Note: Failure to complete this step could cause some functions to be unavailable on the secondary button ribbon in the subfolders.

Image



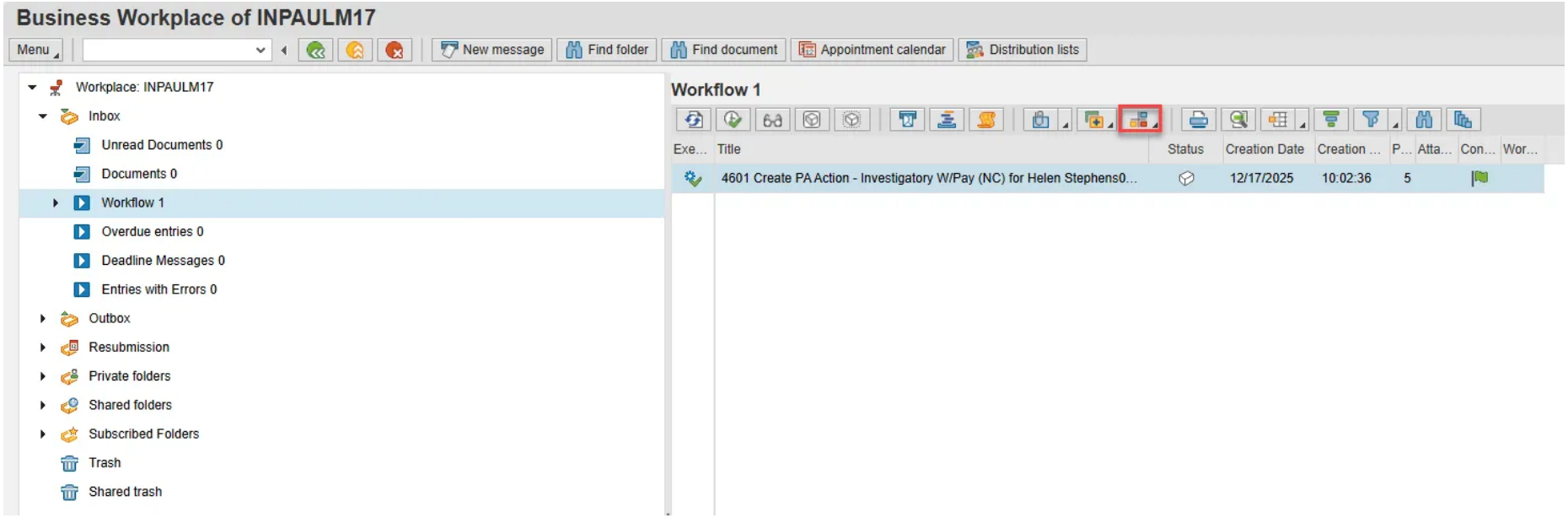

Step 3. Select the **Workflow** subfolder.

Image



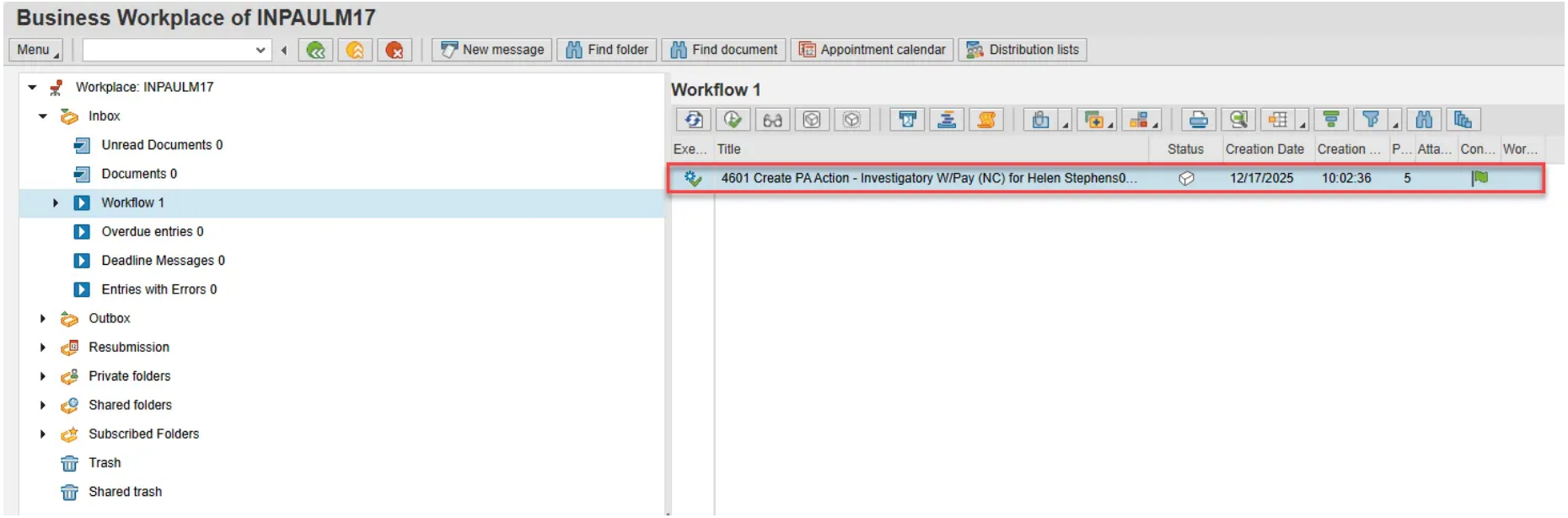

Step 4. Access the Environment button on the secondary button ribbon to retrieve a copy of the note. Access PER-57 Copying Notes from the PCR to Infotypes for steps on retrieving the note.

Image



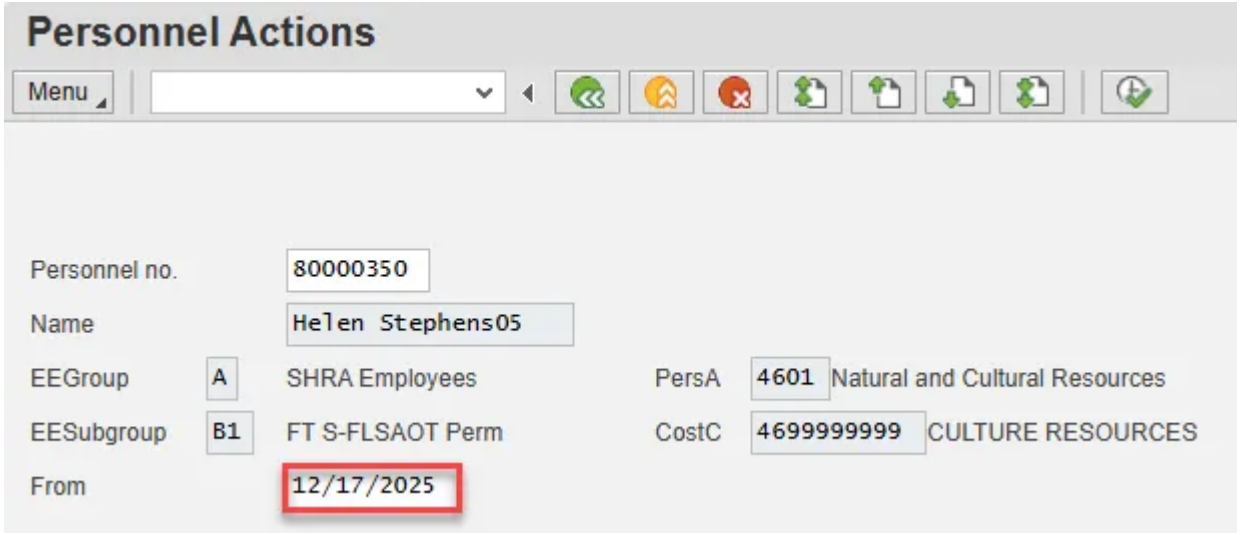

Step 5. Double click the **PCR** to begin the action.

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 **Transfer** by selecting the **gray box** at the beginning of the row.

Image

# Personnel Actions

Menu

| | | | | |
|---|---|---|---|---|
| Personnel no. | 80000350 | | | |
| Name | Helen Stephens05 | | | |
| EEGroup | A | SHRA Employees | PersA | 4601 Natural and Cultural Resources |
| EESubgroup | B1 | FT S-FLSAOT Perm | CostC | 4699999999 CULTURE RESOURCES |
| From | 12/17/2025 | | | |

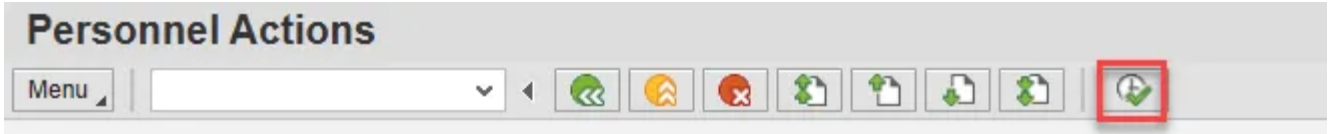
## Personnel Actions

| 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. 80000350

Name Helen Stephens05

EEGroup A SHRA Employees

EESubgroup B1 FT S-FLSAOT Perm

From 12/17/2025

PersA 4601 Natural and Cultural Resources

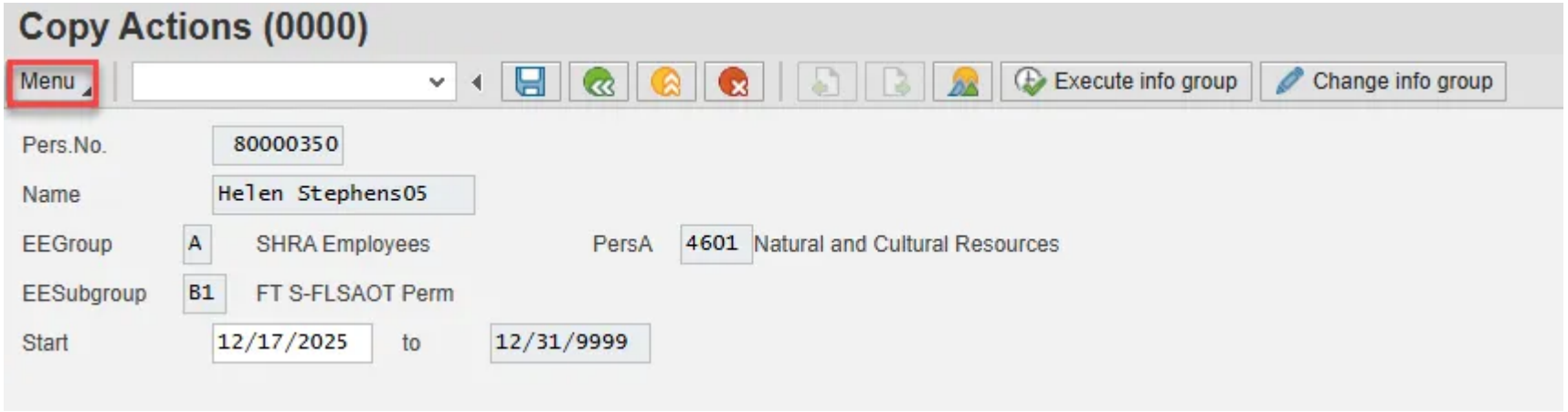
CostC 4699999999 CULTURE RESOURCES

## 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) | | | |

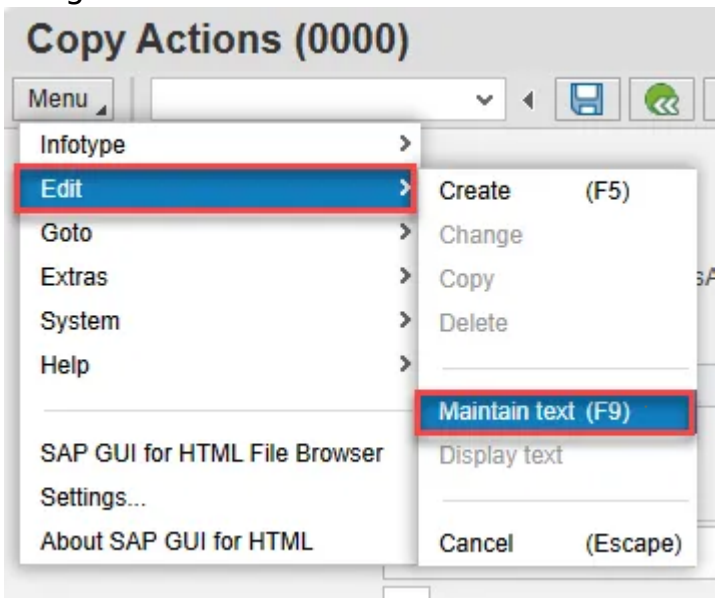
Step 9. On Copy Actions (0000), choose the **Menu** button.

Image



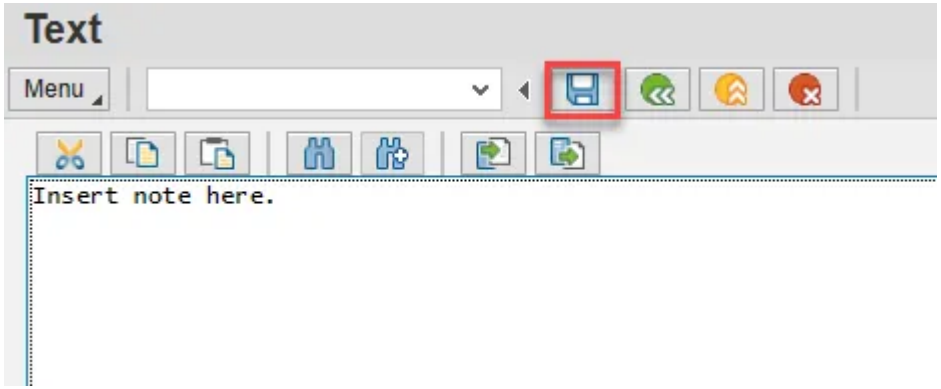

Step 10. Hover over Edit and choose **Maintain text (F9)** from the pop-out menu.

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. 80000350

Name Helen Stephens05

EEGroup A SHRA Employees PersA 4601 Natural and Cultural Resources

EESubgroup B1 FT S-FLSAOT Perm

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

## Personnel action

Action Type: Z5 Investigatory W/Pay (NC)

Reason for Action: 01 Investigatory Placement Leave

## Status

Customer-specific:

Employment: 3 Active

Special payment: 1 Standard wage type

## Organizational assignment

Position: 65001517 ADMINISTRATIVE ASSOCIATE

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 | 80000350 | Name | Helen Stephens05 | | |
| EEGroup | A | SHRA Employees | PersA | 4601 | Natural and Cultural Resources |
| EESubgroup | B1 | FT S-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 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 | 65001517 | ADM ASSC 2 |
| | | ADMINISTRATIVE ASS... |
| Job key | 32000022 | Adm Assc 2 |
| | | Administrative Associate II |
| Org. Unit | 20000237 | 480399999993 |
| | | CR CDS MOA Deputy Di... |
| Org.key | 46014699999999 | |

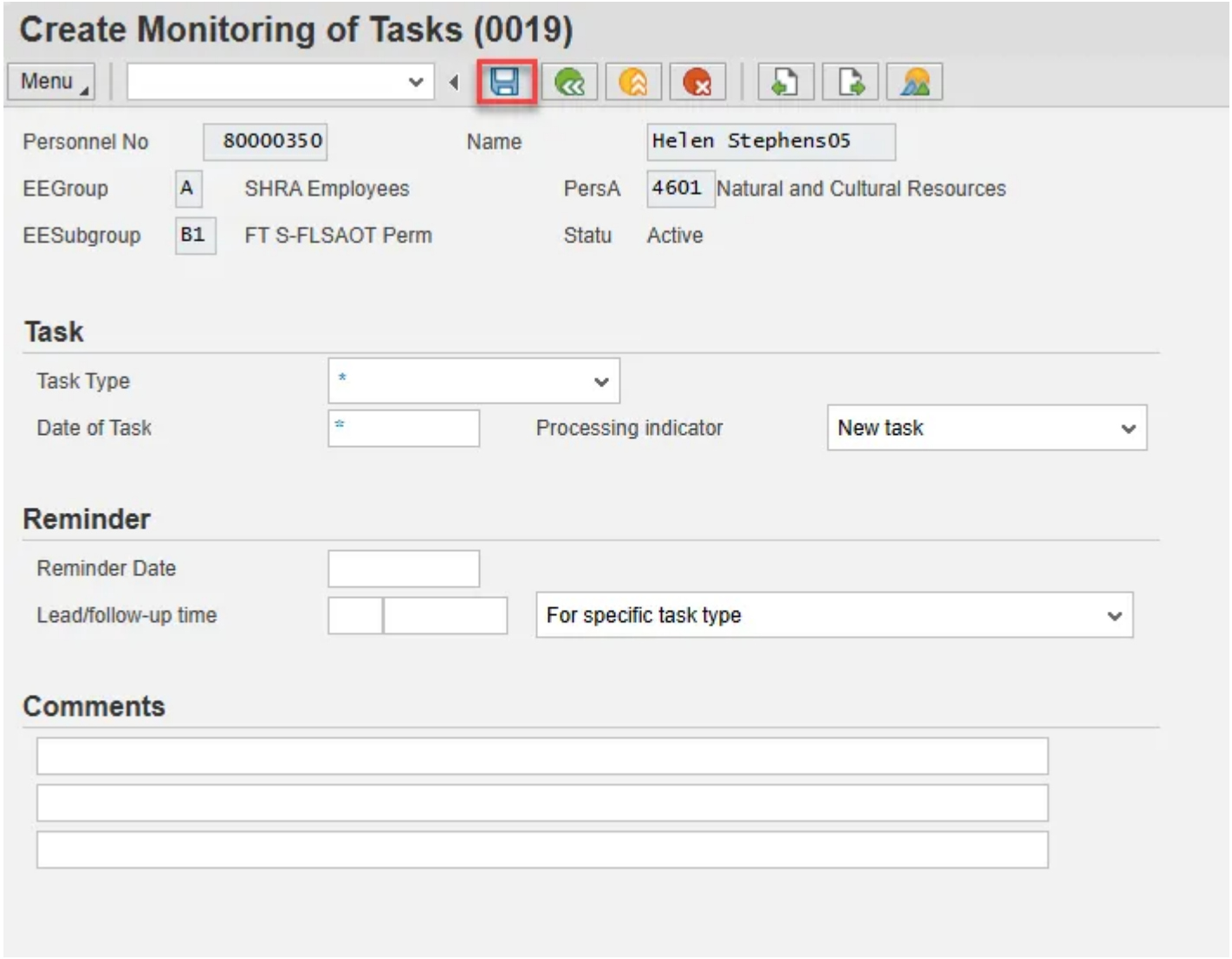
Step 14.  Enter a reminder through the Monitoring of Tasks screen as appropriate.

Insert any notes or comments pertaining to the task.  To view these task reminders, you can run the BOBJ Report – B0099 – Employee Deadline Dates.  Managers can view for their employees via MSS.

Best Practice: Best Practice is to enter the date to remind the supervisor to review the appointment change (end of probation or other).  If no data entry is required, move to the next infotype screen by clicking the Next Screen button.

**Enter and Save**.

Image




Step 15. On the Delimit Objects on Loan (0040) screen, choose the **gray box** next to the item you wish to delimit. Select the **Delimit** button.

Image

# Delimit Objects on Loan (0040)

Menu

| | | | | | |
|---|---|---|---|---|---|
| Personnel No | 80000350 | Name | Helen Stephens05 | | |
| EEGroup | A | SHRA Employees | PersA | 4601 | Natural and Cultural Resources |
| EESubgroup | B1 | FT S-FLSAOT Perm | Statu | Active | |

Choose 12/17/2025 To 12/31/9999 STy. Delimit.Date 12/17/2025

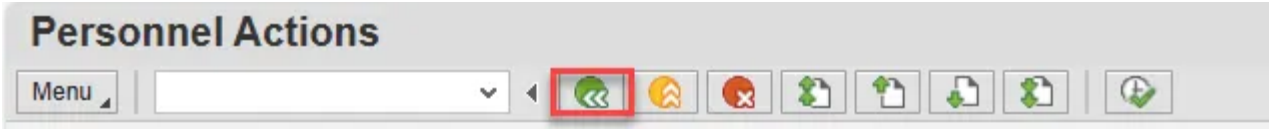
## Overview

| Start Date | End Date | Object on loan | Name | No. | Loan object number |
|---|---|---|---|---|---|
| 01/01/2008 | 12/31/9999 | 01 | State ID | 1 | 5551475 |

Step 16. Back at the Personnel Actions screen, select the **Green Arrow Back** button.

Image

# Personnel Actions




Personnel no. 80000350

Name Helen Stephens05

EEGroup A SHRA Employees

EESubgroup B1 FT S-FLSAOT Perm

From 12/17/2025

PersA 4601 Natural and Cultural Resources

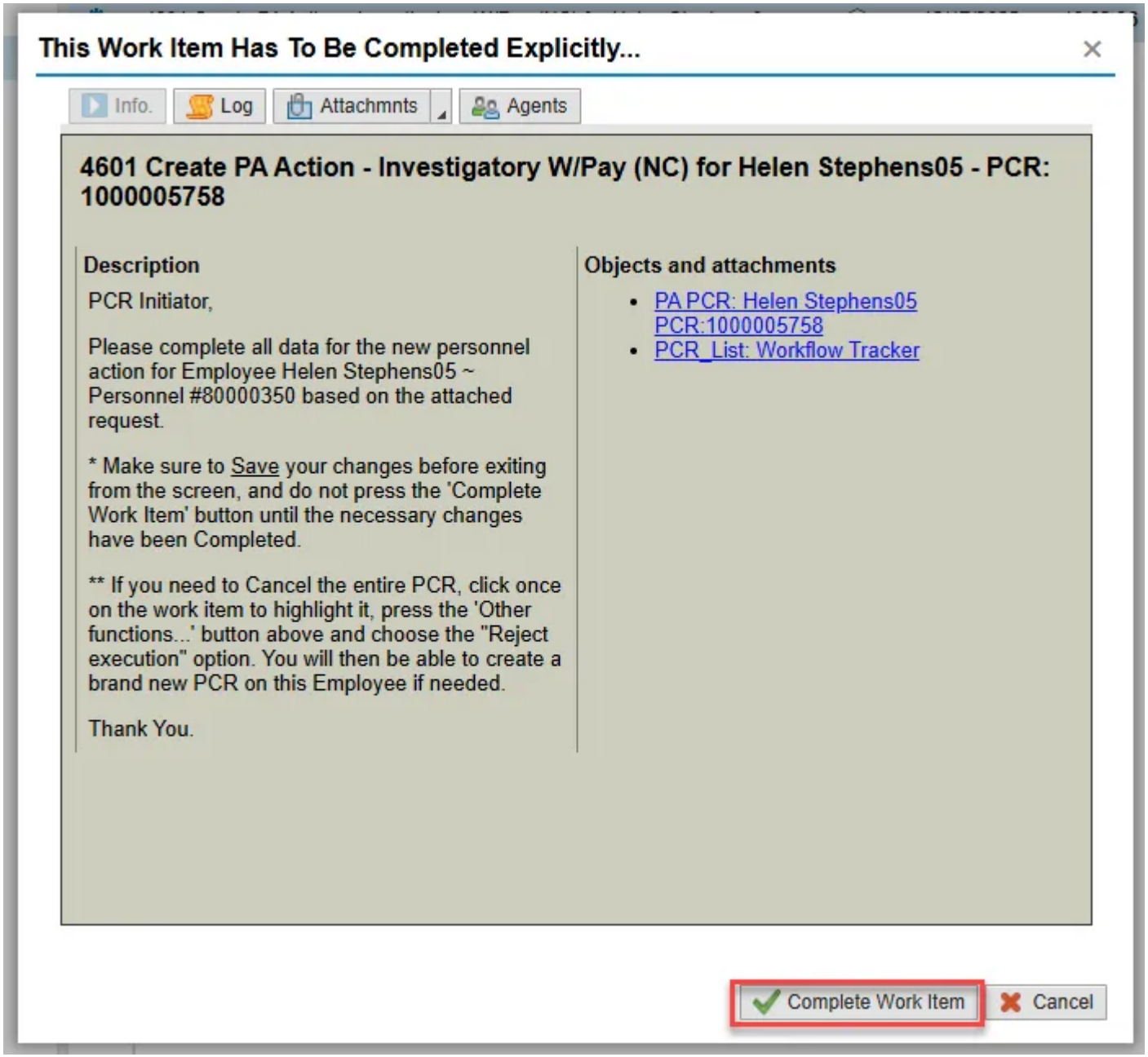
CostC 4699999999 CULTURE RESOURCES

## 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) | | | |

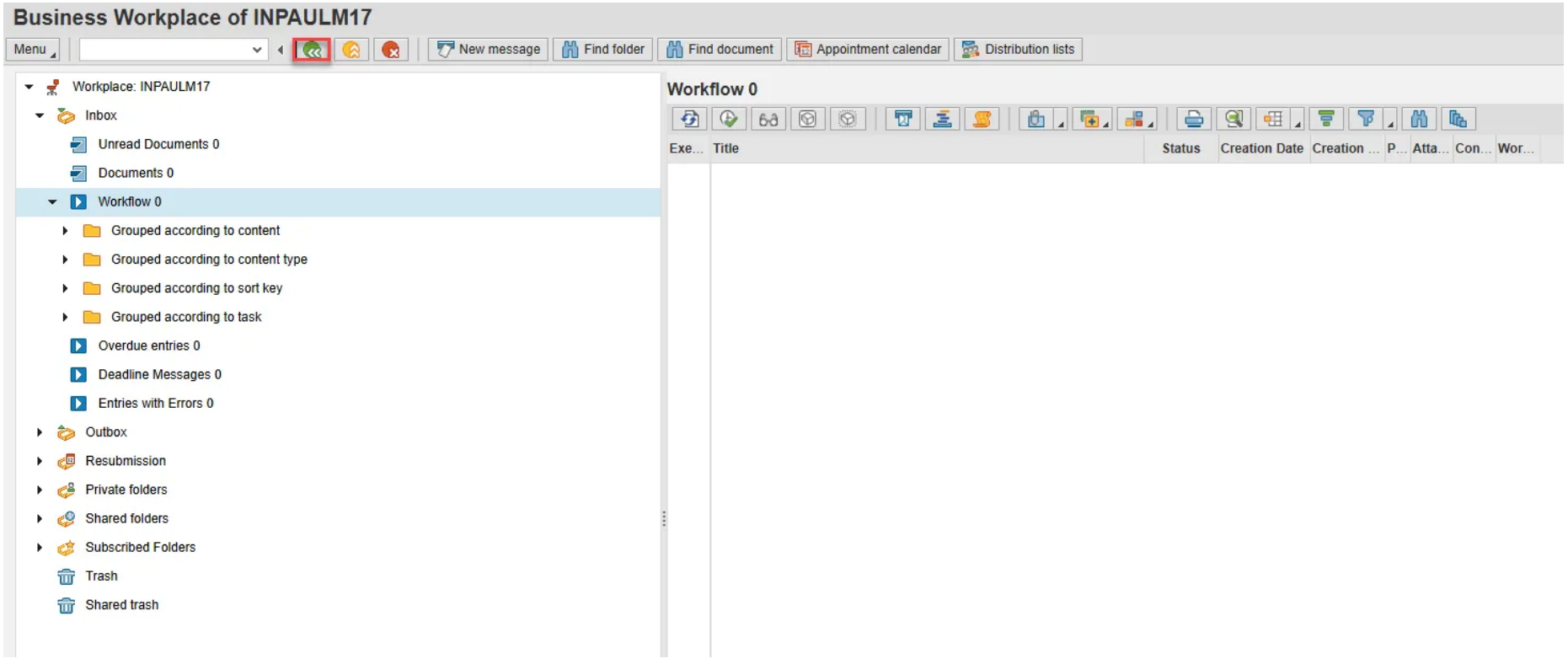
Step 17. On the pop-up, select **Complete Work Item**. (It has a green check beside it.)

Image


This Work Item Has To Be Completed Explicitly...
Info.
Log
Attachmnts
Agents
4601 Create PA Action - Investigatory W/Pay (NC) for Helen Stephens05 - PCR: 1000005758
Description
PCR Initiator,
Please complete all data for the new personnel action for Employee Helen Stephens05 ~ Personnel #80000350 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: Helen Stephens05 PCR:1000005758
PCR_List: Workflow Tracker
Complete Work Item
Cancel

Step 18. From the Business Workplace screen, select the **Green Arrow Back** button to return to the SAP Easy Access screen.

Image




Note: You may need to create additional IT0019s via PA30. To view these task reminders, you can run the BOBJ Report – B0099 – Employee Deadline Dates. Managers can view for their employees via MSS.

The Investigatory with Pay Action is complete, but we recommend reviewing via PA20 all infotypes that have been processed.

As of 7/1/2013, the Investigatory Placement action requires A/A 9690 (Investigatory Leave) to be keyed for all scheduled workdays that fall within the effective dates of the action. If a holiday falls within the effective dates of

the action, A/A 9300 (Holiday Leave) should be keyed.  Leave codes other than A/A 9690 and A/A 9300 will error out in Time Evaluation for an EE on the Investigatory Placement (Z5) action.

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