PER-64 Career Progression Action

Purpose

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

Trigger

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

Business Process Procedure Overview

Career Progression – Pay factors support a salary adjustment and/or competency level adjustment within the pay range of the employee's career-banded class, in conjunction with the employee's attainment and demonstrated use of competencies in same position.

02 - CP-Comp/Skill - Pay factors support a salary adjustment within the pay range of the employee's career-banded class competency level, in conjunction with the employee's attainment and demonstrated use of competencies in the same position at the same overall competency level. The employee's overall competency level will not change. (If salary adjustment is not granted due to funding issues, an action is not processed.)

05 - CP-Labor Market – An employee's salary is low in relation to market guidelines applicable to the employee's competencies, and a salary adjustment is in order. Such a situation could be due to: an adjustment in the banded class market rates in conjunction with a labor market study; implementation of a market reference rate with the agency/university; insufficient funding at time of career banding implementation to pay employee at appropriate rate; removal of an internal equity/pay alignment issue that had prevented an employee from being paid at appropriate competency rate.

06 - CP-Comp Level Change – Employee's overall competency level is changing as a result of the employee's attainment/assignment and demonstrated use of competencies at a higher or lower overall competency level within the same banded class. The pay factors may support an increase, decrease, or no change in salary. (Note: change in overall competency level that results from disciplinary action shall be coded as a Demotion.)

08 - Broad Band Level Change – a change in the level to which an employee is assigned. (Used for pilot banded employees.)

10 - Broad Band Job Change – Transfer of an employee from one banded occupational group to another banded occupational area--may or may not involve position number and salary change. Object ID must change. If salary change is involved, include in the comment, reason for the adjustment and justification for any increase exceeding 10%. (Used for pilot banded employees.)

11 - Salary Adjustment Fund – A salary increase, provided through approved use of salary adjustment funds, granted to career-banded employees whose salary upon transfer from the graded system to the banded system is less than allowed by the career-banding salary administration policy (Requires OSHR approval).

03 - Temporary Comp/Skill - Salary adjustment within the pay range of the employee's career-banded class, in conjunction with the employee's temporary assignment of higher-level competencies in the same position. Overall competency level may or may not change. NOTE: Additional competencies are not the result of "acting pay or acting promotion."

NOTE: The “N/A Grade Band Transfer” reason is no longer an option for Career Progression action. Please refer to the Transfer action BPP.

Tips and Tricks

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

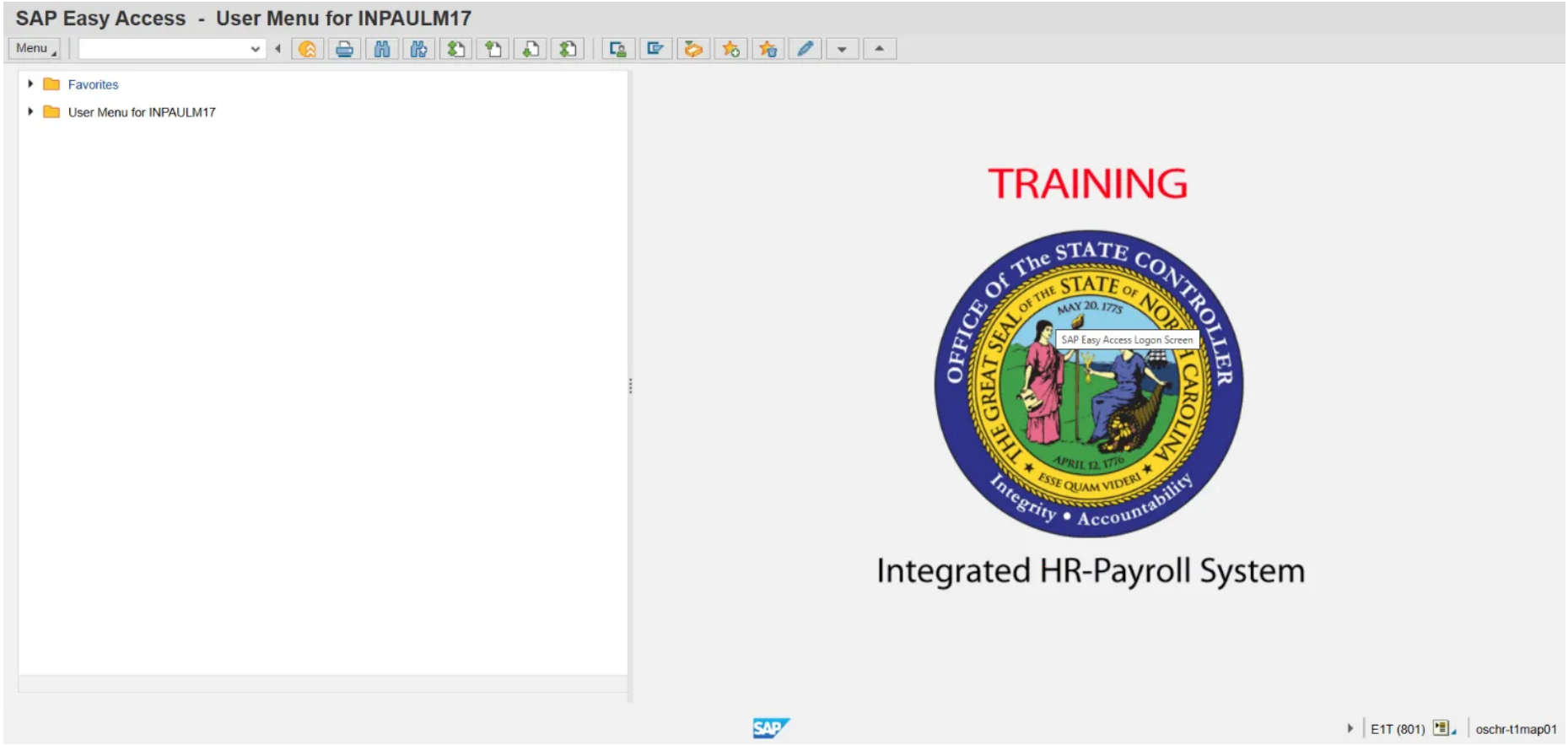
Access Transaction

Via Transaction Code: ZPAA076; SWBP; PA40

Procedure

There are 42 steps to complete this process.

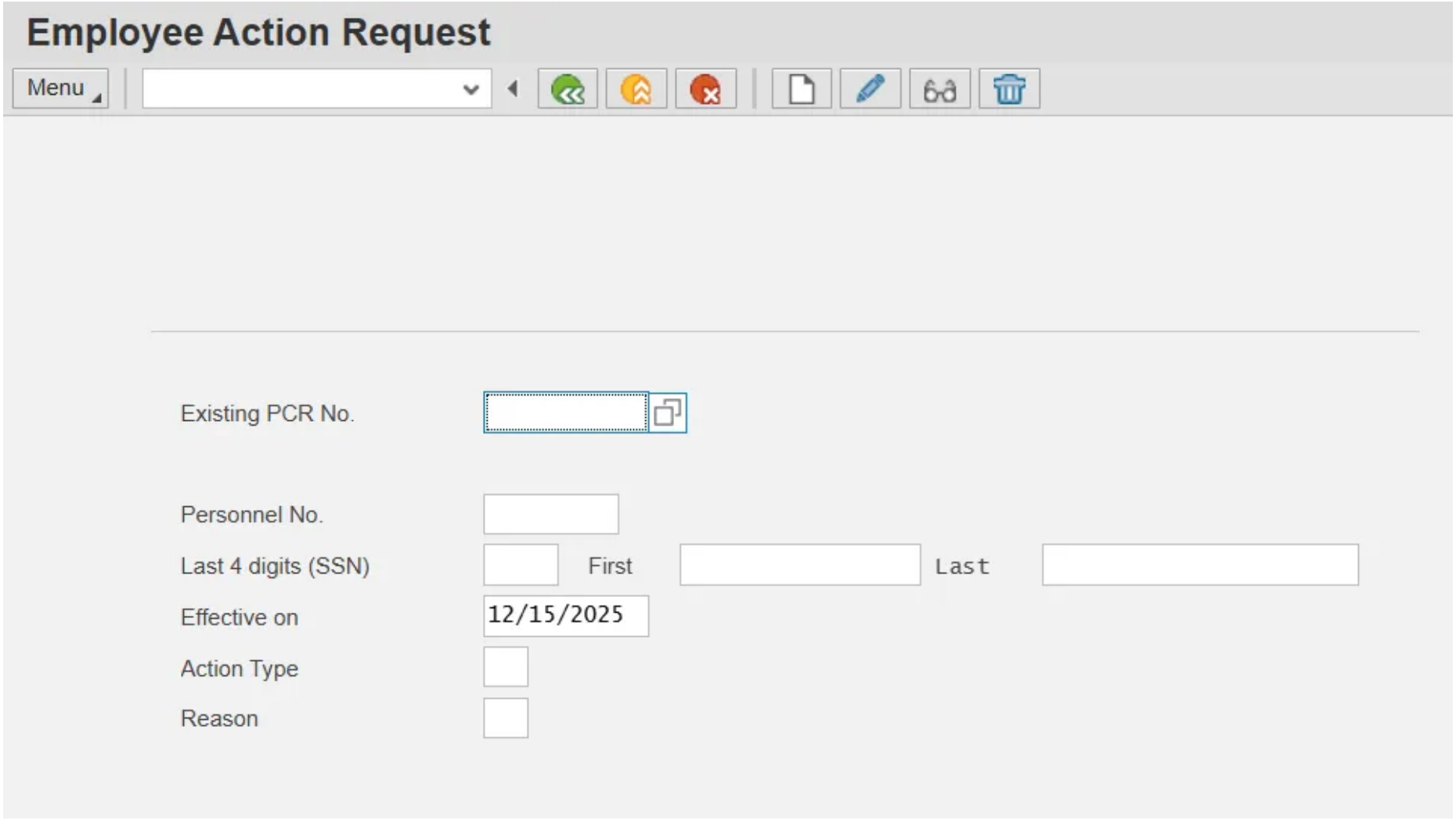
Image



Step 1. Update the Command Field by entering transaction code: **ZPAA076**.

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

Image



Step 3. Update the following fields:

- **Personnel No.**: Unique employee identifier
- **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: ZH
- **Reason**: Reason for the action, such as CP-Comp/Skill
    - Example: 02

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

Enter the Personnel Number of the individual to receive the Career Progression. Click Enter to retrieve the name of the individual and verify you have the correct Personnel Number.

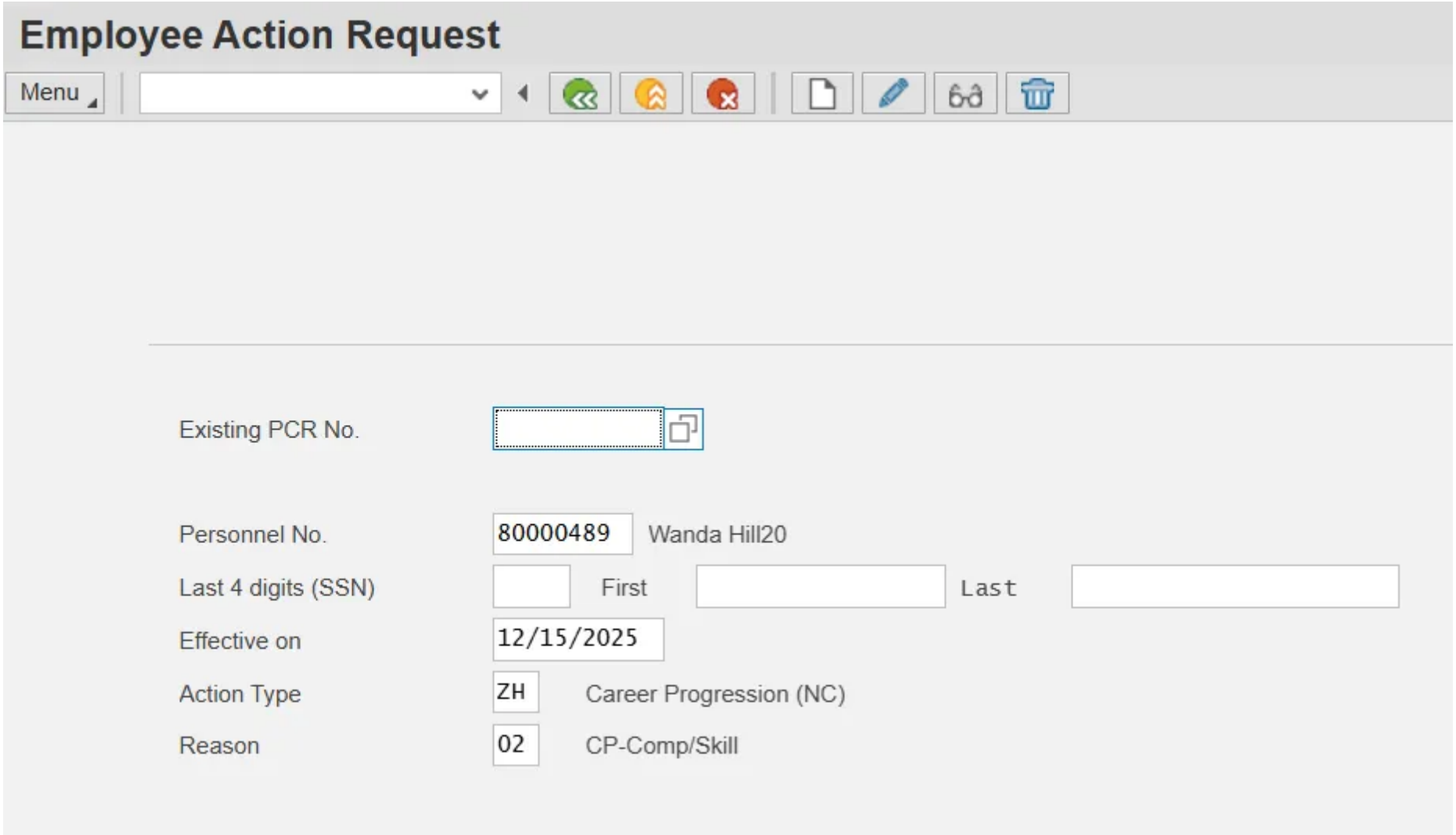
If you need to look up the personnel number, click your cursor in the field and click on the matchcode search button to the right of the field for search options.

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** 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.

Step 6. Update the following fields:

- Annual Salary

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

Enter the new position number and the new annual salary or hourly rate. Click Enter to validate the data. If the employee is hourly, leave the annual salary field blank and only complete the hourly salary field.

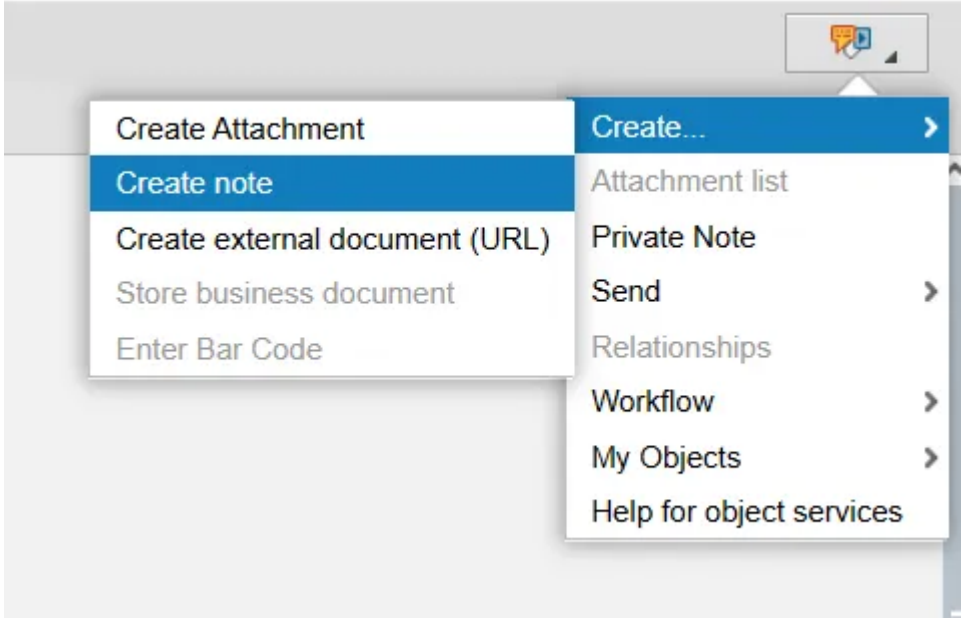
Step 8. Click the **Save (Ctrl+S)** button.

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

Step 9. Click the **(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.

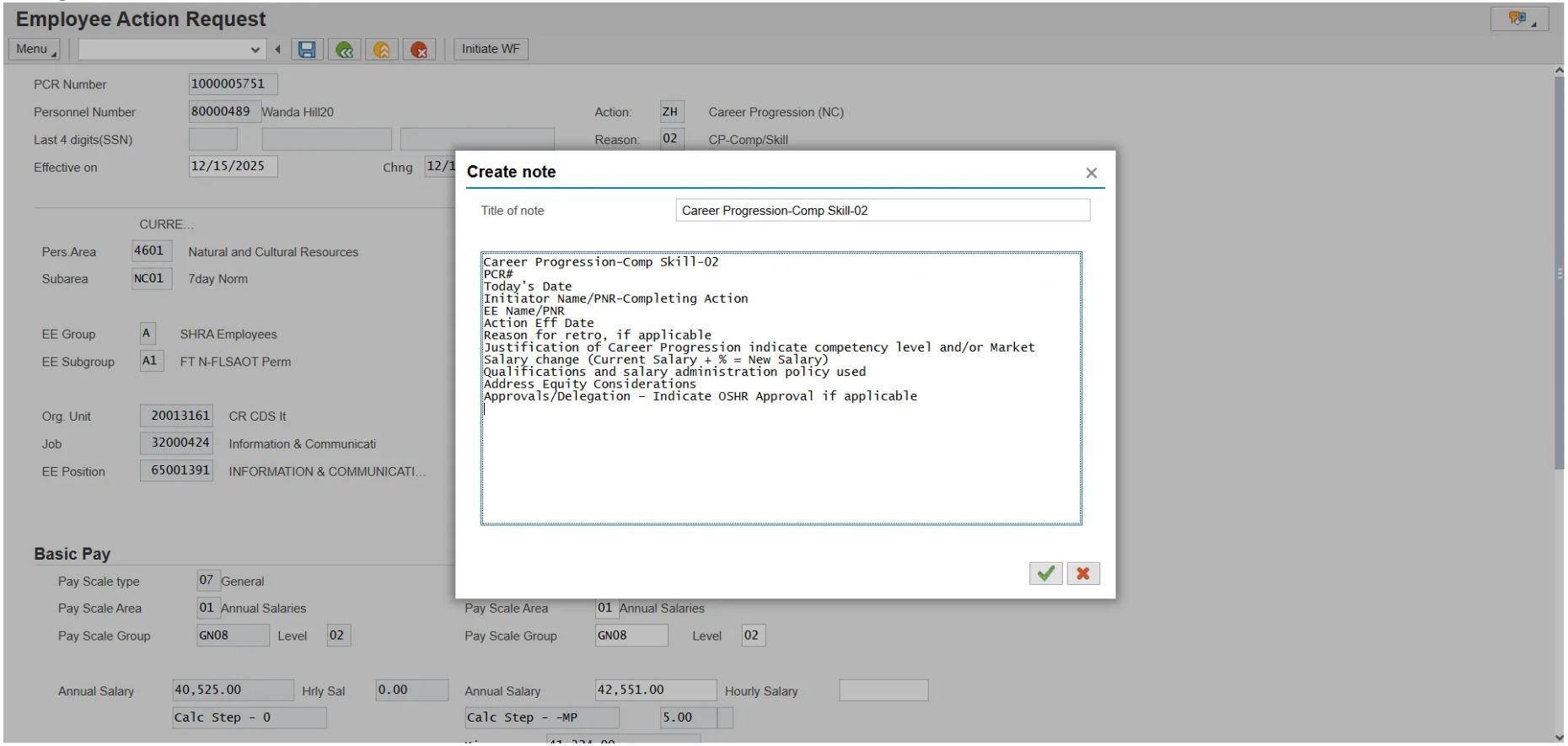
Step 11. Click **Create > Create note**.

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

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.

Image



Step 12. Click the **(Enter)** button to save the note.

Step 13. Click the **Enter** button on the Employee Action Request screen.

Step 14. Click the **Save (Ctrl+S)** button.

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

Select the **Initiate Workflow** button to send the Career Progression 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 16. Click the **(Enter)** button.

Step 17. Click the **Back (F3)** button.

Step 18. The **Initiate Career Progression Action** is complete.

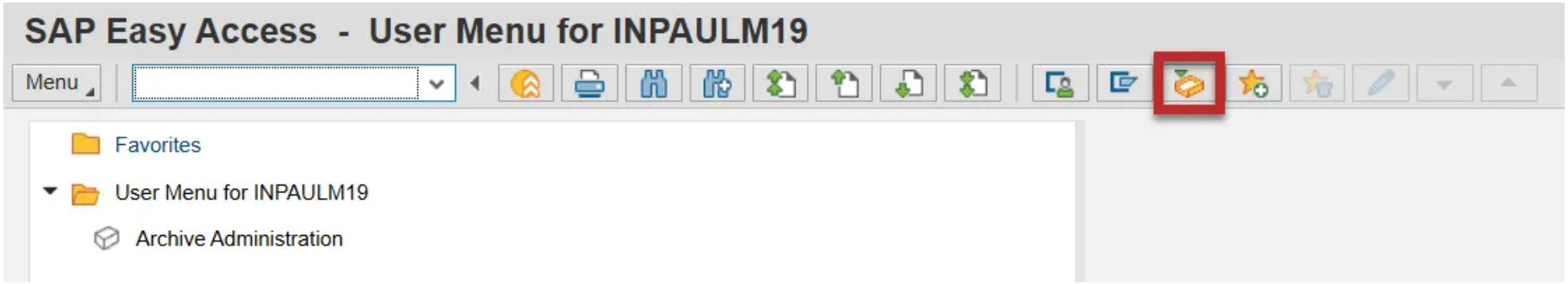
After Workflow Approvals have been received, process with the Complete Career Progression Action process.

Instructions for Completing The Action

Access Transaction

Via Transaction Code: SBWP

Image

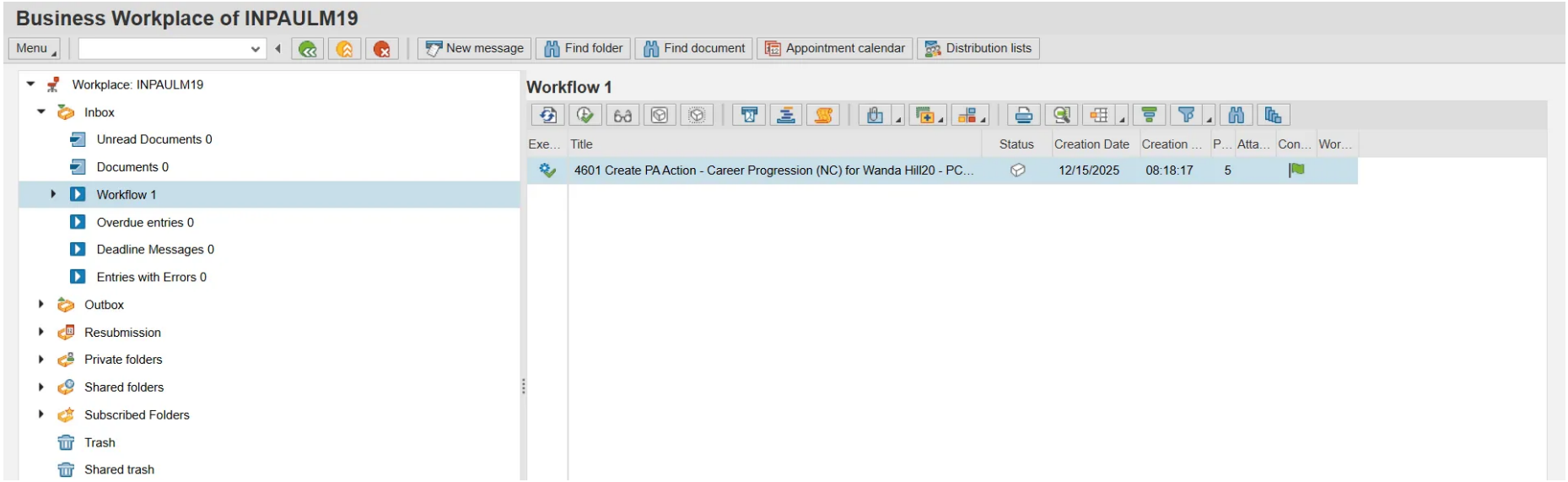


Step 19. Click the **SAP Business Workplace (Ctrl+F12)** button.

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

Step 20. Select **Inbox >> Workflow**.

Image



Step 21. 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.

Step 22. Double-click on the Approved PCR row or highlight the PCR and click the **Execute (F8)** button.

Step 23. Update the following field:

- From: Effective date of the personnel action
  - Example: 12/15/25

Step 24. Highlight **Career Progression (NC)** action type.

Image

Personnel Actions

Menu

Personnel no.	80000489				
Name	Wanda Hill20				
EEGroup	A	SHRA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	CostC	4699999999	CULTURE RESOURCES
From	12/15/2025				

Personnel Actions

Action Type	Personne…	EE group	EE subgr…
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)			
Separation (NC)			

Step 25. Click the **Execute (F8)** button.

The effective date is the date the Career Progression will go into effect. This date must match the effective date on the PCR.

Image

Copy Actions (0000)

Menu | Execute info group | Change info group

Pers.No.	80000489				
Name	Wanda Hill20				
EEGroup	A	SHRA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm			
Start	12/15/2025	to	12/31/9999		

Personnel action

Action Type	ZH Career Progression (NC)	
Reason for Action	02	CP-Comp/Skill

Status

Customer-specific	
Employment	3 Active
Special payment	1 Standard wage type

Organizational assignment

Position	65001391	INFORMATION & COMMUNICATI
Personnel area	4601	Natural and Cultural Resources
Employee group	A	SHRA Employees
Employee subgroup	A1	FT N-FLSAOT Perm

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action

Step 26. 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 27. Click **Edit, >> Maintain text**.

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

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

Step 29. Click the Save **(Ctrl+S)** button.

Image

Create Organizational Assignment (0001)

Menu | Org Structure

Personnel No	80000489	Name	Wanda Hill20		
EEGroup	A	SHRA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active	
Start	12/15/2025	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					
Func. Area					

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	65001391	I & C SPEC 1	
		INFORMATION & COM...	

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

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

Critical! Subject employees must be positive time. Employment percent should always be 100%.

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

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

Image

Copy Planned Working Time (0007)

Menu | Work schedule

Personnel No	80000489	Name	Wanda Hill20		
EEGroup	A	SHRA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active	
Start	12/15/2025	To	12/31/9999		

Work schedule rule

Work schedule rule	D01N08GN	MTWHF-8,SaS-O	WSR Finder
Time Mgmt status	9 9 - Negative Time Recording		
Working week	07 Wk - Sun (mdnt) - Sat		

☐ Part-time employee

Working time

Employment percent	100.00
Daily working hours	8.00
Weekly working hours	40.00
Monthly working hrs	173.33
Annual working hours	2080.00
Weekly workdays	

Step 32. 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 the Integrated HR-Payroll System team members.

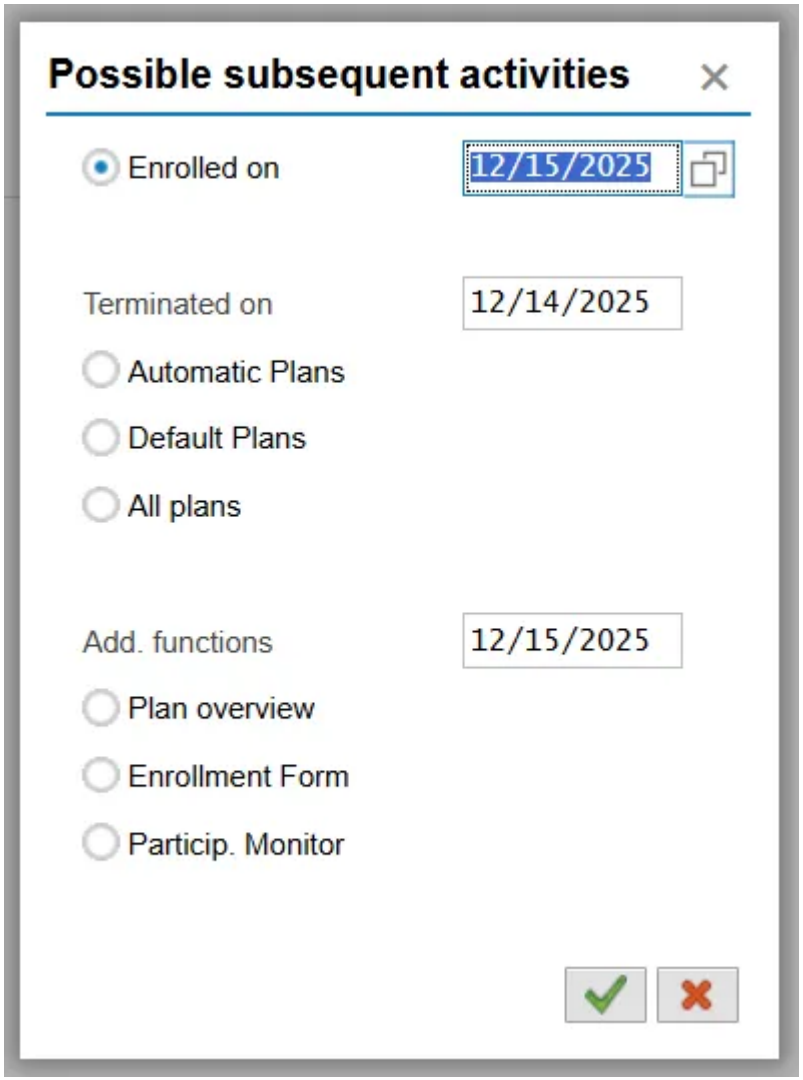
Step 33. Click the **Save (Ctrl+S)** button.

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

Step 34. Click the **Enter** button.

Step 35. Click the **Save (Ctrl+S)** button.

Image



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

Step 36. 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	80000489	Name	Wanda Hill20		
EEGroup	A	SHRA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active	
Start	12/15/2025	to	12/31/9999		

Subtype 0 Basic contract

Salary

Reason	ZH		Cap.util.lvl	100.00	
PS type	07	General	WkHrs/period	173.33	Monthly
PS Area	01	Annual Salaries	Next inc.		
PS group	GN08	Level 02	Ann.salary	42,551.00	USD

Wag...	Wage Type Long Text	O...	Amount	Curre...	In...	A...	Number/Unit	Unit
1000	Regular Salary		3,545.92	USD		✓		

IV 12/15/2025 - 12/31/9999 0.00 USD

Step 37. Update the following field:

- Reason: Reason for the action such as Career Progression
  - Example: ZH

Step 38. 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 Career Progression (ZH), click Enter to validate the data. Notice the Annual Salary field has retrieved the amount submitted via workflow (or the hourly field is appropriated).

If the employee is hourly, you will manually enter the hourly rate in the amount field; hit enter and the annual salary automatically calculates. Click the **Save (Ctrl+S)** button.

Step 39. Click the **Back (F3)** button.

Image

This Work Item Has To Be Completed Explicitly...

Info. | Log | Attachmnts | Agents

4601 Create PA Action - Career Progression (NC) for Wanda Hill20 - PCR: 1000005751

Description

PCR Initiator,

Please complete all data for the new personnel action for Employee Wanda Hill20 ~ Personnel #80000489 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

- Object Attachment: Career Progression-Comp Skill-02
- PA PCR: Wanda Hill20 PCR:1000005751
- PCR_List: Workflow Tracker

Complete Work Item | Cancel

Step 40. Click the **Complete Work 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 41. Click the **Back (F3)** button.

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

Step 42. The Career Progression Action is complete, but we recommend reviewing via PA20 all infotypes that have been processed.

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