PER-61 Appointment Change Action

Purpose

The purpose of this Business Process Procedure is to explain how to complete an appointment change action in the Integrated HR-Payroll System.

Trigger

There is a need to process an Appointment Change action for one of the reasons listed in the Business Process Procedure Overview section.

Business Process Procedure Overview

An appointment change is defined as the change in the employee’s type of appointment. Examples include, but are not limited to:

- Permanent
- Probation
- Time-limited
- Time-limited probationary

Note: Employee is not changing position numbers.

An Appointment Change occurs when an employee has successfully completed his or her probationary period and receives an appointment to either a permanent or a time-limited position. Based upon the supervisor‘s recommendation, the employee may transition from probationary status at two (2) years. In order for the employee to receive an increase in salary, an Appointment Change Action (rather than a Salary Adjustment Action) must be used. This is because the employee subgroup must be changed. When you create an Appointment Change, not all infotypes that display will require that you change information. Your agency, as well as the type of appointment change, determines this.

Reasons:

- **(08)** Supplemental to Probation - Employee is changing from Temporary status to a Probationary status, within the same position, but the employee must serve a probationary period.
- **(09)** Supplemental to Permanent - Employee is changing from a Temporary status to a Permanent status, within the same position, in which the employment in the Temporary position satisfies the probation period and credentials have been verified.
- **(11)** Probation to Permanent - Employee has completed the probationary period.
- **(03)** Probation/Time-Limited to Time-Limited - Employee has completed the probationary time-limited period.
- **(02)** Time-Limited to Permanent - Employee has exceeded 36 months of employment or position is being made permanent.
- **(22)** Time-Limited to Probation - Employee is changing from time-limited status to probationary status within the same position.
- **(04)** Part-Time to Full-Time - Employee hours will be 40.
- **(05)** Full-Time to Part-Time - Employee hours will be less than 40.
- **(06)** Change in Hours - Part-time hours changing
- **(07)** Extension of Appointment - (No money involved)
- **(10)** Intermittent to Probation - Employee status that requires a probationary period
- **(12)** Permanent to Time-Limited - Employee status that is time-limited

- **(13)** Permanent to Supplemental - Employee status that is Temporary
- **(14)** Permanent to Intermittent - Employee status that is Intermittent
- **(15)** Change in FLSA – Employee overtime eligibility status (FLSA) is changing.
- **(20)** Supplemental to Time-Limited - Employee is changing from Temporary status to a Time-Limited status.
- **(21)** Supplemental to Probation TL - Employee is changing from Temporary status to Probation Time-Limited status.

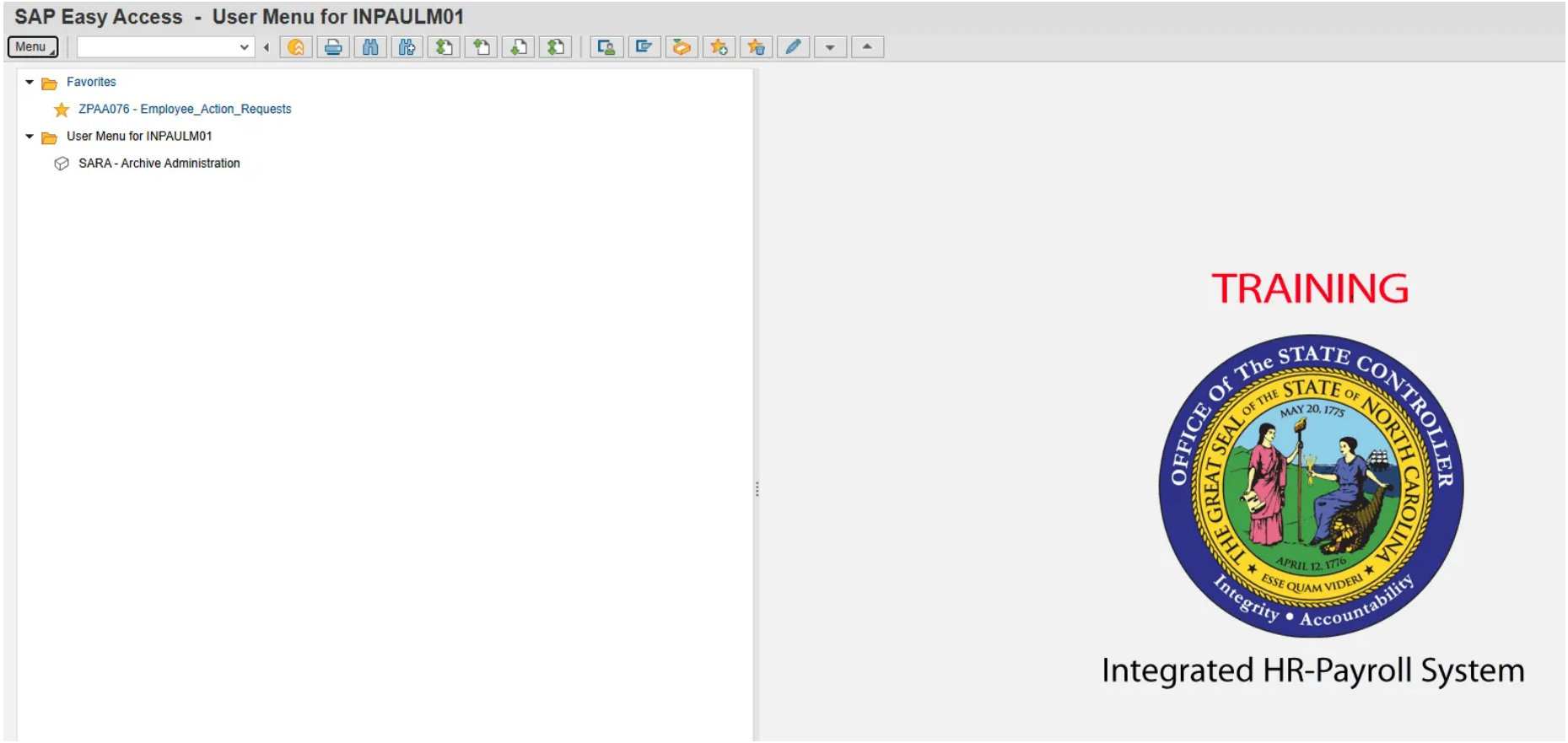
Access Transaction

Via Transaction Code: ZPAA076

Action Request Procedure

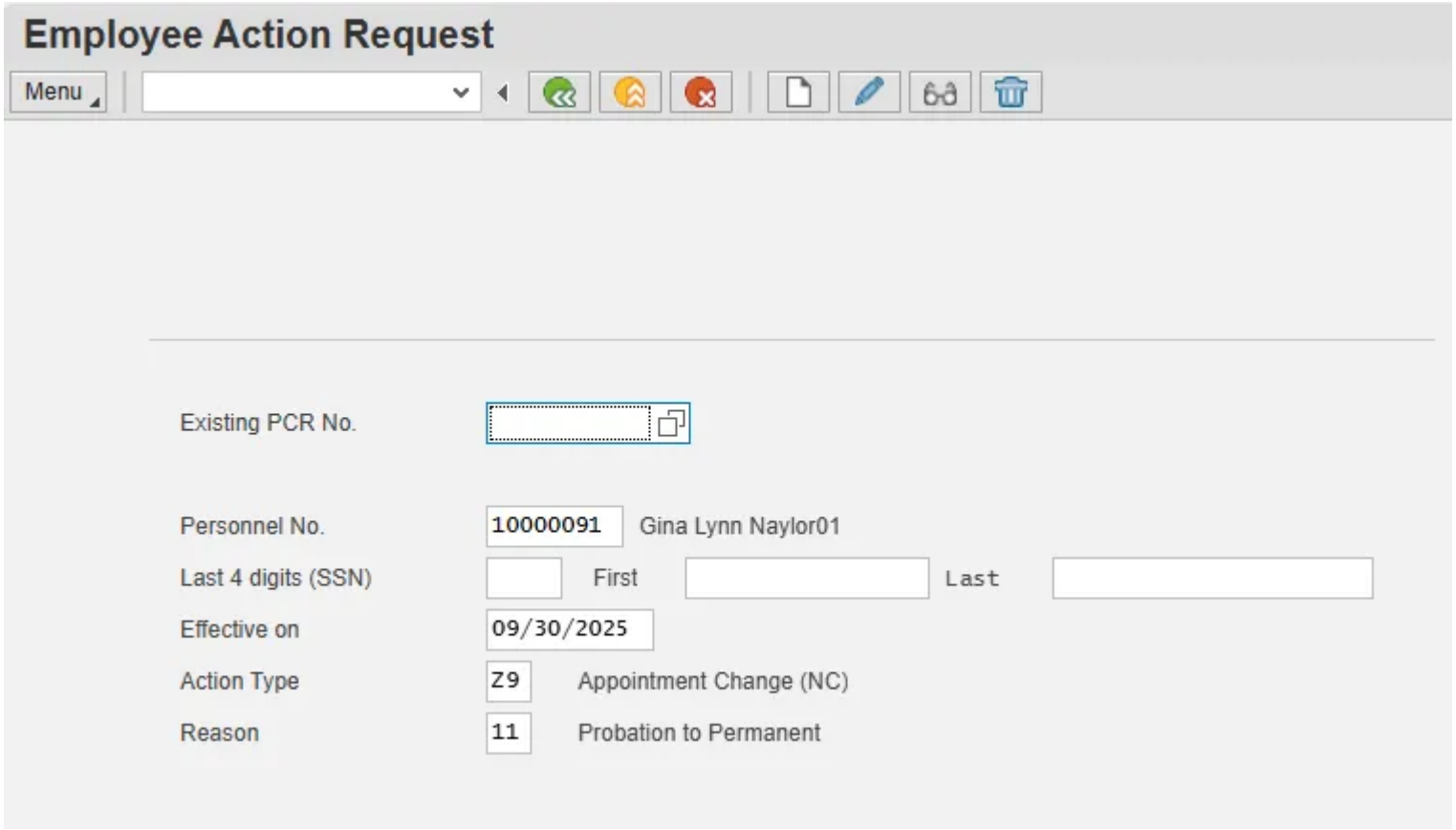
There are 45 steps to complete this process.

Image



Step 1: Type **ZPAA076** in the Command field and click **Enter** OR double-click ZPAA076 from favorites.

Image



Step 2: Update the following fields:

Field Name	Description	Values

Personnel No.	Unique employee identifier	Enter value in Personnel No. Example: 10000091
Effective on	The date on which the action will be effective	Enter value in Effective on. Example: 09/30/2025
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.	Enter value in Action Type. Example: Z9
Reason	Reason for the action, such as Probation to Permanent	Enter value in Reason. Example: 11

Step 3: Click **Enter**.

Enter the Personnel Number of the individual on which the Appointment Change is be processed. 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 may change the date to a day in the past or in the future. OSHR approval is required for Actions that exceed 60 days in the past.

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

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

Step 4: 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

Menu | Initiate WF

PCR Number

Personnel Number 10000091 Gina Lynn Naylor01 Action: Z9 Appointment Change (NC)

Last 4 digits(SSN) Reason: 11 Probation to Permanent

Effective on 09/30/2025 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	SPA Employees	A	SPA Employees
EE Subgroup	A2	FT N-FLSAOT Prob	A1	FT N-FLSAOT Perm
Org. Unit	20010281	CR CDS ST LIBRARY ADID Te	20010281	CR CDS ST LIBRARY ADID Te
Job	32000330	Systems Consultant	32000330	Systems Consultant
EE Position	65001997	Systems Consultant	65001997	Systems Consultant

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	GN12	Level 01	Pay Scale Group	GN12	Level 02
Annual Salary	51,000.00	Hrly Sal 0.00	Annual Salary	56,220.00	Hourly Salary
	Calc Step - -MP			Calc Step - MIN	10.24
			Min	56,220.00	
			Max	63,552.00	Next Inc Date

Step 5: Update the following fields:

Field Name	Description	Values
EE Subgrp	Employee’s type of appointment	Enter value in EE Subgrp Example: A1
Annual Salary	Employee’s annual basic pay	Enter value in Annual Salary. Example: 56220

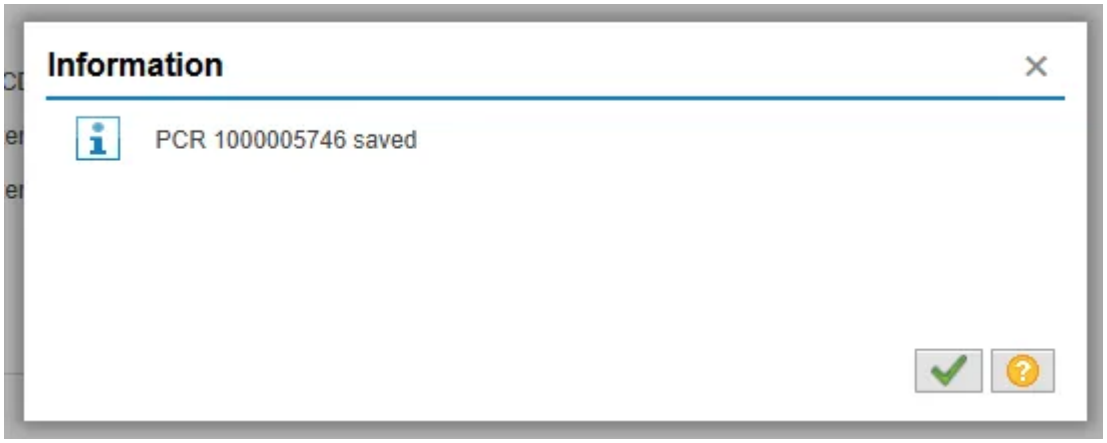
Step 6: Click **Enter**.

Enter the salary/hourly information in the Annual Salary or Hourly Salary field. Clicking Enter will allow you to validate the data.

Be sure to check the Level field. It is related to the Annual Salary field and based on a salary range. Click on the matchcode to see the salary ranges.

If the employee is an hourly employee, you will have to enter the hourly amount. The annual amount doesn’t populate for hourly/salary employees. The system will calculate on IT0008 Basic Pay when created.

Image



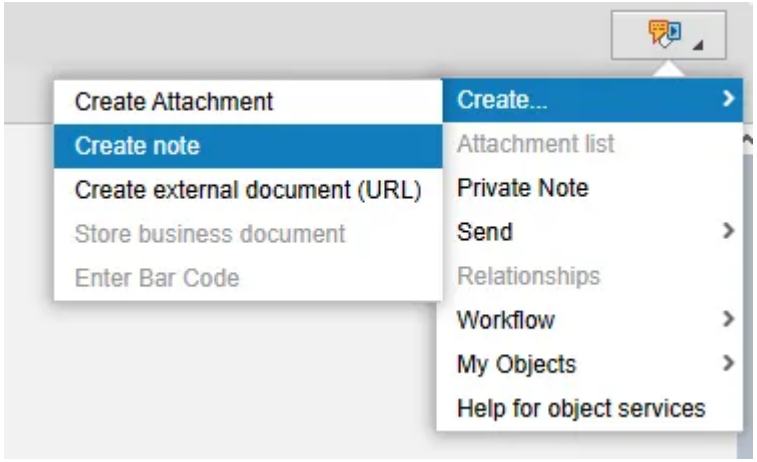
You can save this information as many times as you like. Each time you will receive a confirmation of the save. You will not be able to create a note attachment until you have saved it at least once. If you have already submitted the PCR to workflow, you will not be able to change the details, nor save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

Step 7: Click **Enter**.

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

Review the data prior to saving. If the data is correct, click **Save**.

Image



Step 9: Click the **Services for Objects** button.

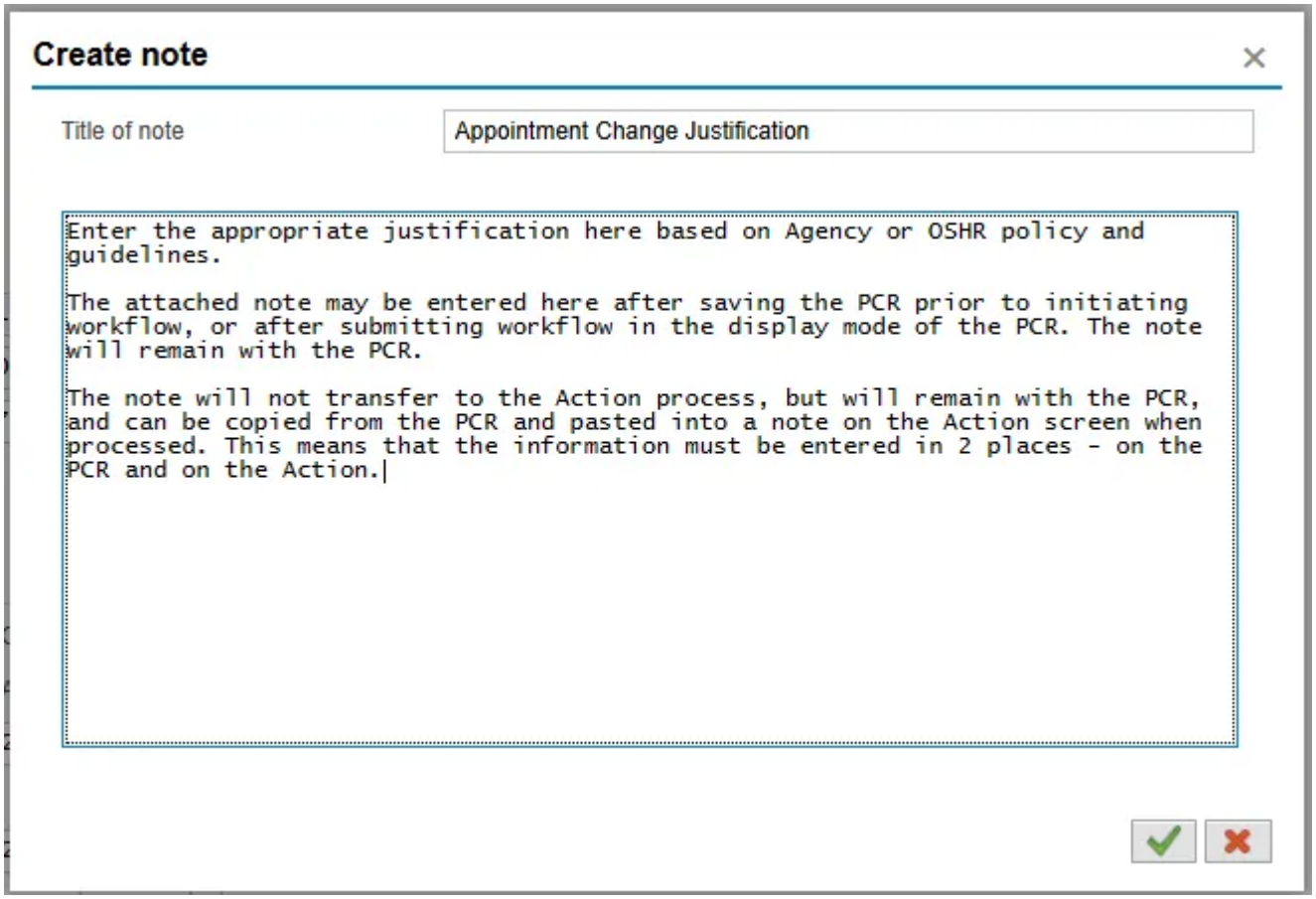
Step 10: Click **Create... >> Create note**.

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, it may be beneficial to create a note. If you want to add a document as an attachment, use the attachment area.

This note and attachment area gets attached only to this specific PCR. 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



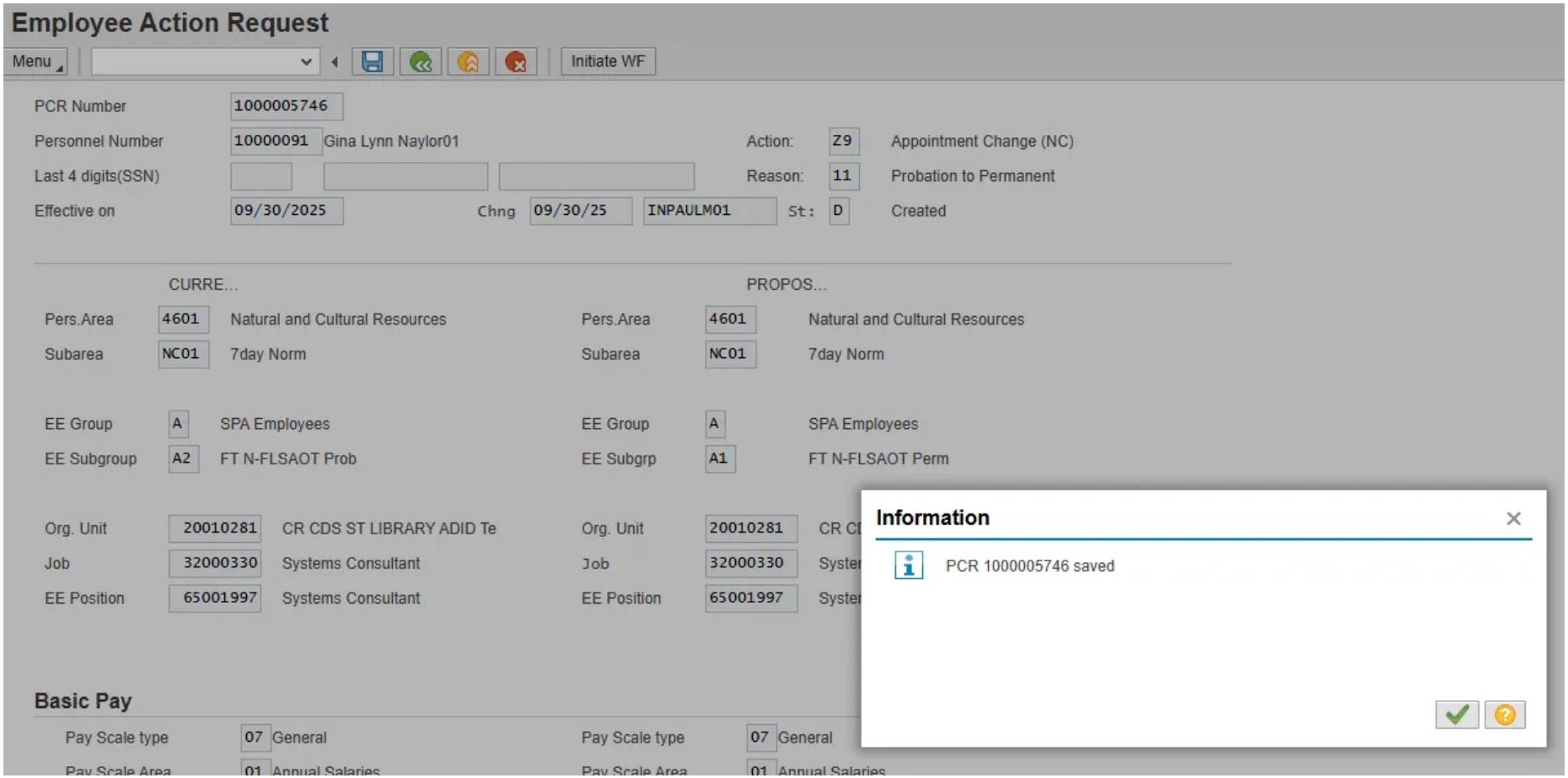
Step 11: Update the following fields:

Field Name	Description	Values
Title of note	The short text to act as the title of the attachment	Enter value in Title of note. Example: Appointment Change Justification

Field Name	Description	Values
Long text	An open text field	Long text An open text field Enter value in long text. Example: appropriate information

Step 12: Click **Enter** or the **green check**.

Image



Step 13: Click **Save** to ensure the note is attached to the PCR.

Step 14: Click **Enter** or the **green check**.

Image

Employee Action Request

Menu | Initiate WF

PCR Number	1000005746				
Personnel Number	10000091	Gina Lynn Naylor01	Action:	Z9	Appointment Change (NC)
Last 4 digits(SSN)			Reason:	11	Probation to Permanent
Effective on	09/30/2025	Chng 09/30/25 INPAULM01	St:	D	Created

	CURRE...		PROPOS...	
Pers.Area	4601	Natural and Cultural Resources	4601	Natural and Cultural Resources
Subarea	NC01	7day Norm	NC01	7day Norm
EE Group	A	SPA Employees	A	SPA Employees
EE Subgroup	A2	FT N-FLSAOT Prob	A1	FT N-FLSAOT Perm
Org. Unit	20010281	CR CDS ST LIBRARY ADID Te	20010281	CR CDS ST LIBRARY ADID Te
Job	32000330	Systems Consultant	32000330	Systems Consultant
EE Position	65001997	Systems Consultant	65001997	Systems Consultant

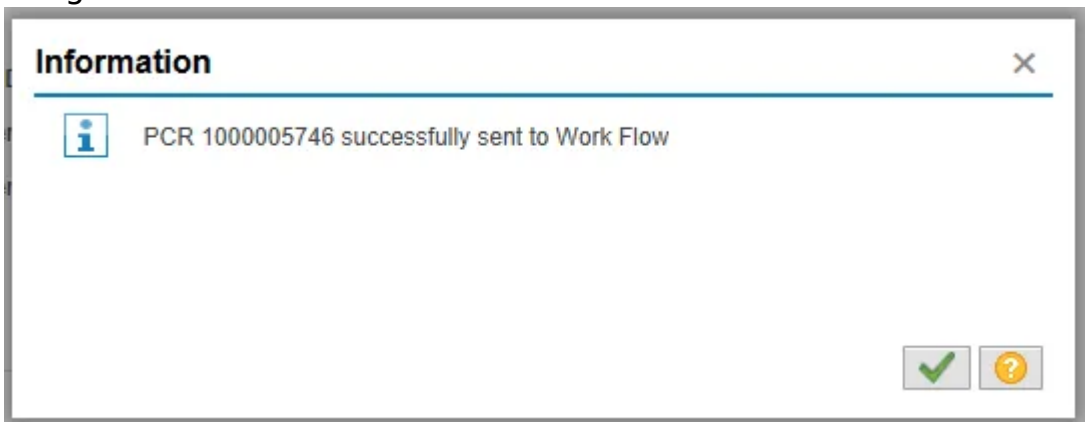
Basic Pay

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	GN12	Level 01	Pay Scale Group	GN12	Level 02
Annual Salary	51,000.00	Hrly Sal 0.00	Annual Salary	56,220.00	Hourly Salary
	Calc Step - -MP			Calc Step - MIN	10.24
			Min	56,220.00	
			Max	63,552.00	Next Inc Date

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

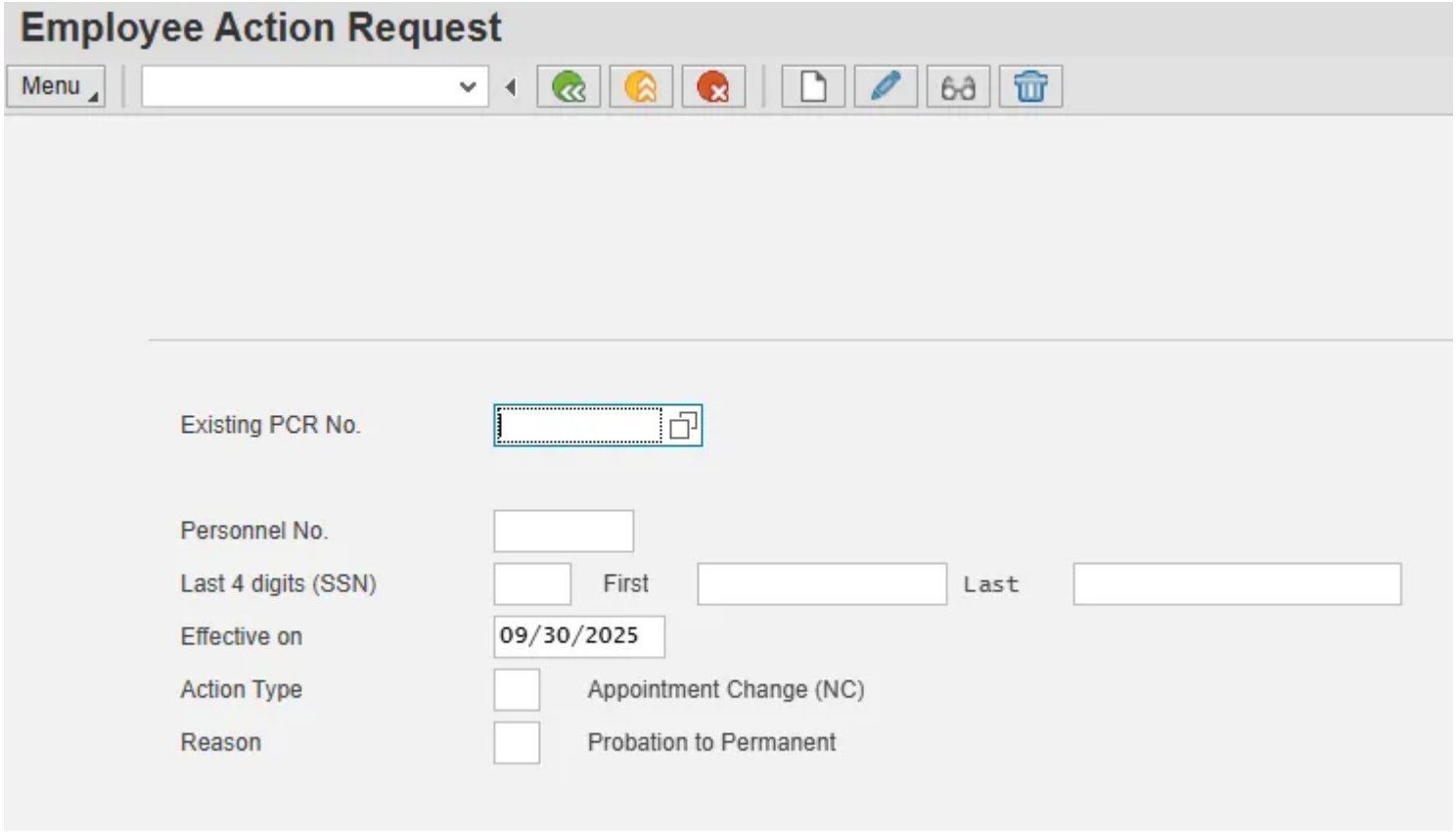
Select the Initiate Workflow button to send the Appointment Change Action through the approval process. No changes can be made after the PCR has been submitted for approval, unless the PCR is rejected at any stage and sent back to you (the initiator/requestor).

Image



Step 16: Click **Enter** or the **green check**.

Image



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

Step 18: The Initiate Appointment Change Action request is complete.

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

Instructions

Access Transaction:

Via Menu Path: SAP menu ==> Office ==> SBWP – Workplace

Via Transaction Code: SBWP, PA400

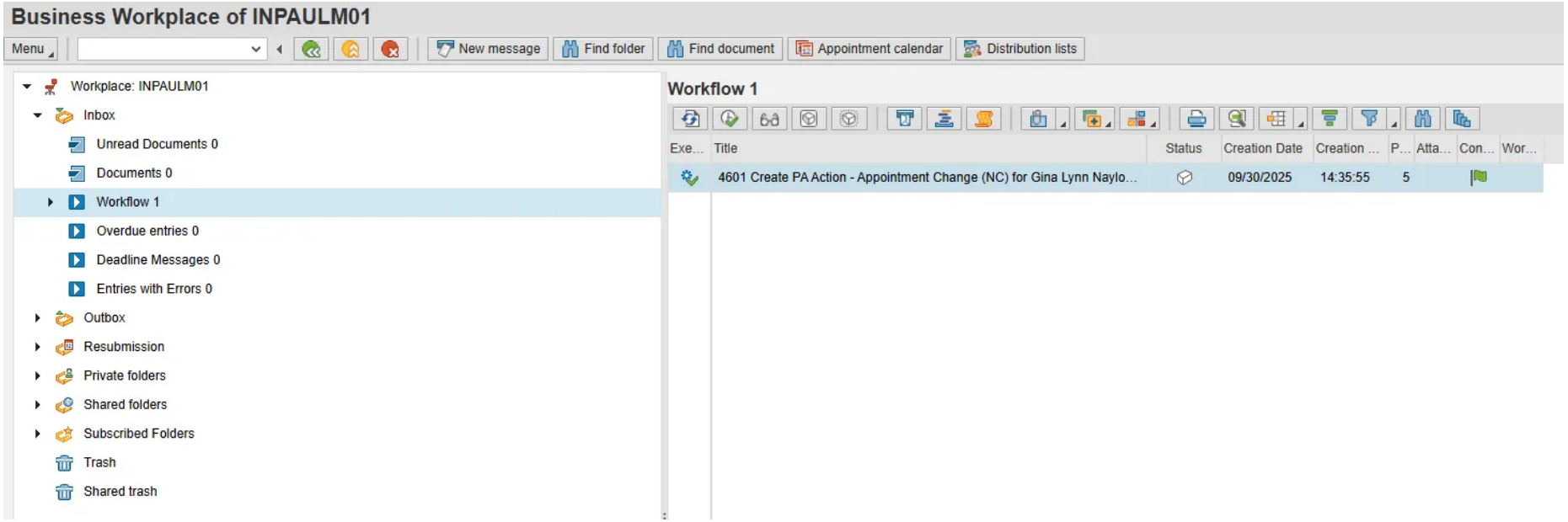
Image



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

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

Image



Step 20: Expand Inbox by clicking on the black triangle expand node next to the Inbox folder.

Step 21: Click on the Workflow subfolder.

Step 22: Select the **PCR** row to highlight it.

You will need to get a copy of the note. It does not carry over to the Action.

Use this resource to see the steps for retrieving a copy of the note: Copying Notes From The PCR to Infotypes.

Step 23: Double-click on the **PCR row** OR click the **Execute (F8)** button to begin the action.

Image

Personnel Actions

Menu

Personnel no.	10000091				
Name	Gina Lynn Naylor01				
EEGroup	A	SPA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A2	FT N-FLSAOT Prob	CostC	4699999999	CULTURE RESOURCES
From	09/30/2025				

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 24: Update the following field:

Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From. Example: 09/30/2025

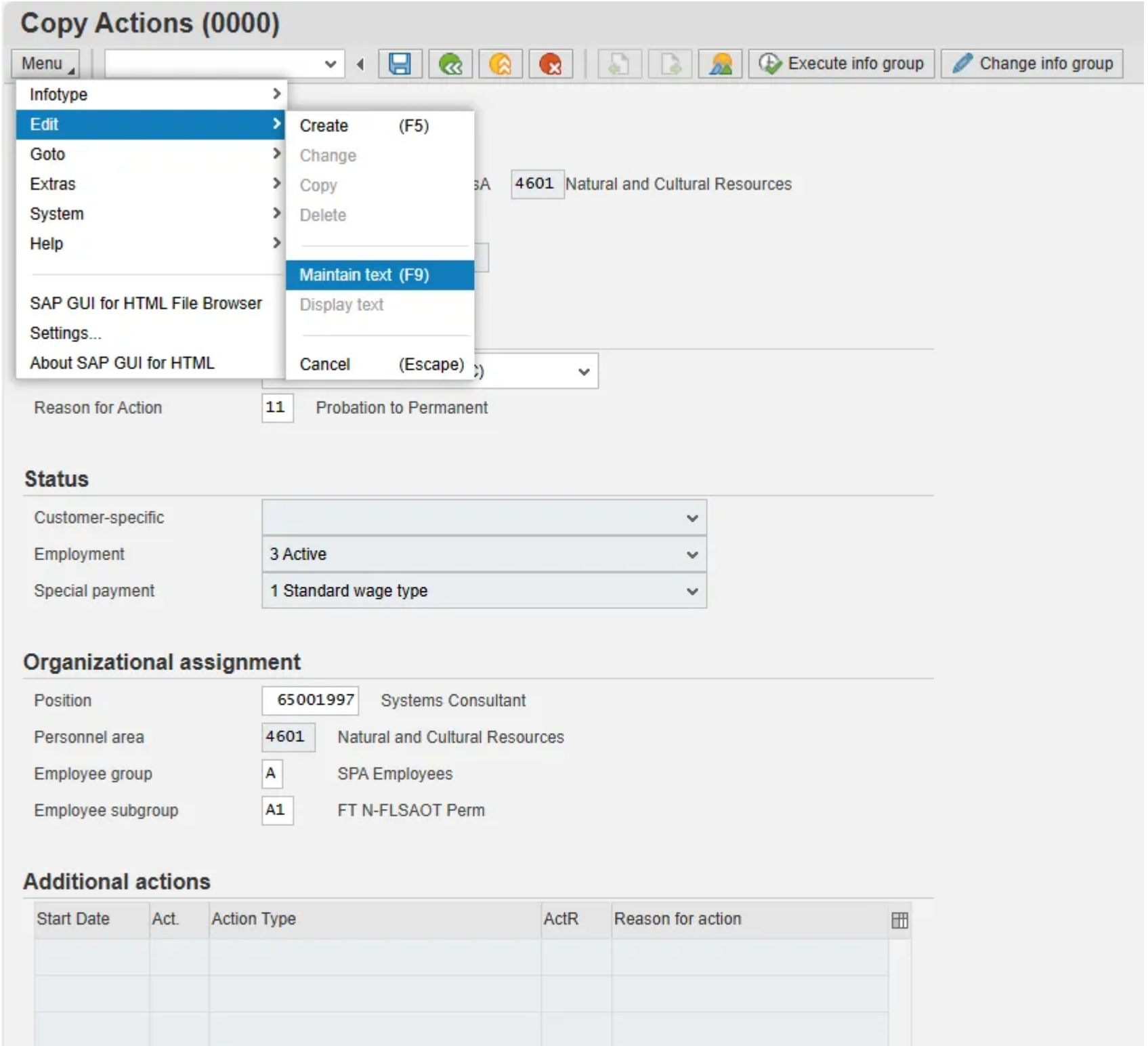
Step 25: Highlight the **Appointment Change (NC)** action type.

Step 26: Click the **Execute (F8)** button.

Verify this is the individual for whom you need to process the Appointment Change action.

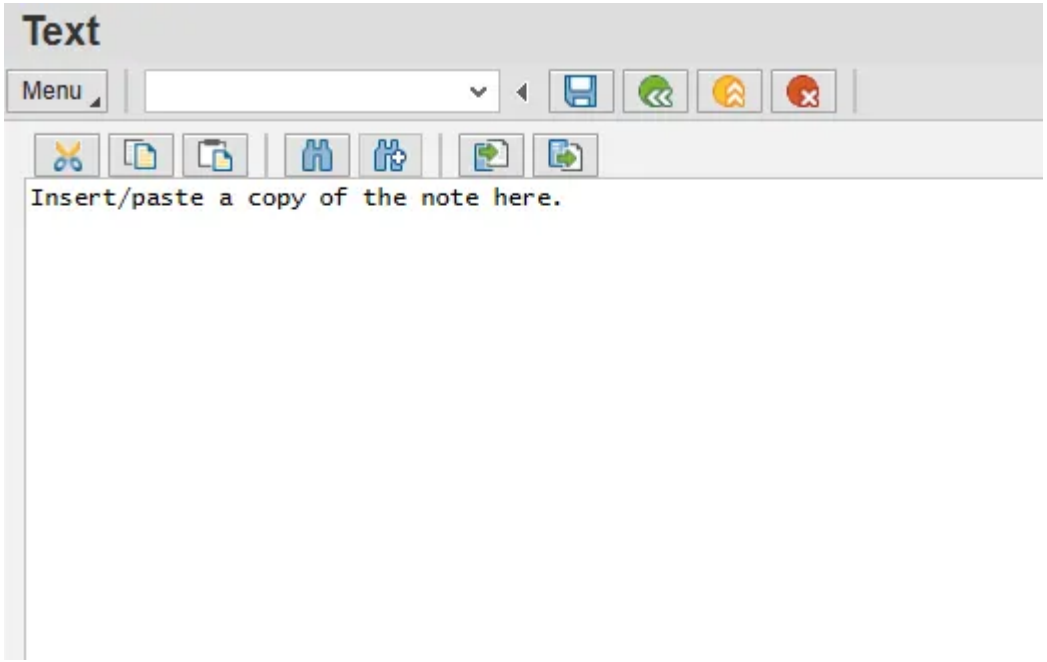
Critical: The effective date is the date the Appointment Change will go into effect and **MUST** match the date that was submitted as the effective date on the original PCR. The system will not fill this date in - you can find the date on the PCR display from your inbox if you do not know the effective date on the original PCR (not necessarily the date the PCR was submitted, but the date the Appointment Change is to be effective).

Image


Copy Actions (0000)
Menu
Execute info group
Change info group
Infotype
Edit
Goto
Extras
System
Help
SAP GUI for HTML File Browser
Settings...
About SAP GUI for HTML
Create (F5)
Change
Copy
Delete
Maintain text (F9)
Display text
Cancel (Escape)
4601 Natural and Cultural Resources
Reason for Action
11
Probation to Permanent
Status
Customer-specific
Employment
3 Active
Special payment
1 Standard wage type
Organizational assignment
Position
65001997
Systems Consultant
Personnel area
4601
Natural and Cultural Resources
Employee group
A
SPA Employees
Employee subgroup
A1
FT N-FLSAOT Perm
Additional actions
Start Date
Act.
Action Type
ActR
Reason for action

Step 27: On Copy Actions (0000) click **Menu >> Edit >> Maintain text** to attach a copy of the note to this infotype.

Image



Step 28: Insert a copy of the note in the Text box and click **Save**.

Image

Copy Actions (0000)

Menu | Execute info group | Change info group

Pers.No.	10000091				
Name	Gina Lynn Naylor01				
EEGroup	A	SPA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A2	FT N-FLSAOT Prob			
Start	09/30/2025	to	12/31/9999		

Personnel action

Action Type	Z9 Appointment Change (NC)	
Reason for Action	11	Probation to Permanent

Status

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

Organizational assignment

Position	65001997	Systems Consultant
Personnel area	4601	Natural and Cultural Resources
Employee group	A	SPA Employees
Employee subgroup	A1	FT N-FLSAOT Perm

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action

Step 29: Click **Enter**. You will notice some text turns red and there will be a yellow warning message in the bottom left corner.

Image



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

Image

Copy Actions (0000)

Menu | Execute info group | Change info group

Pers.No. 10000091

Name Gina Lynn Naylor01

EEGroup A SPA Employees PersA 4601 Natural and Cultural Resources

EESubgroup A2 FT N-FLSAOT Prob

Start 09/30/2025 to 12/31/9999

Personnel action

Action Type: Z9 Appointment Change (NC)

Reason for Action: 11 Probation to Permanent

Status

Customer-specific:

Employment: 3 Active

Special payment: 1 Standard wage type

Organizational assignment

Position: 65001997 Systems Consultant

Personnel area: 4601 Natural and Cultural Resources

Employee group: A SPA Employees

Employee subgroup: A1 FT N-FLSAOT Perm

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action

Step 30: Click the **Save (Ctrl+S)** button.

Image

Create Organizational Assignment (0001)

Menu | Org Structure

Personnel No	10000091	Name	Gina Lynn Naylor01		
EEGroup	A	SPA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A2	FT N-FLSAOT Prob	Statu	Active	
Start	09/30/2025	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	SPA Employees	Payr.area	01	NC Monthly
EE subgroup	A1	FT N-FLSAOT Perm	Contract		

Organizational plan

Percentage	100.00	Assignment
Position	65001997	Sys Consltnt
		Systems Consultant
Job key	32000330	Sys Consltnt
		Systems Consultant
Org. Unit	20010281	48040104108
		CR CDS ST LIBRARY A...
Org.key	46014699999999	

Step 31: Click **Enter**.

Step 32: Click the **Save (Ctrl+S)** button.

Image

Copy Planned Working Time (0007)

Menu | Work schedule

Personnel No	10000091	Name	Gina Lynn Naylor01		
EEGroup	A	SPA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active	
Start	09/30/2025	To	12/31/9999		

Work schedule rule

Work schedule rule	D01N08GN	MTWHF-8,SaS-O	WSR Finder
Time Mgmt status	1 1 - Positive 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	

Additional fields

☐ Telework Eligible

Adjust their work schedule as appropriate and save the data.

The Work Schedule Rule, Time Mgmt status and Working week 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.

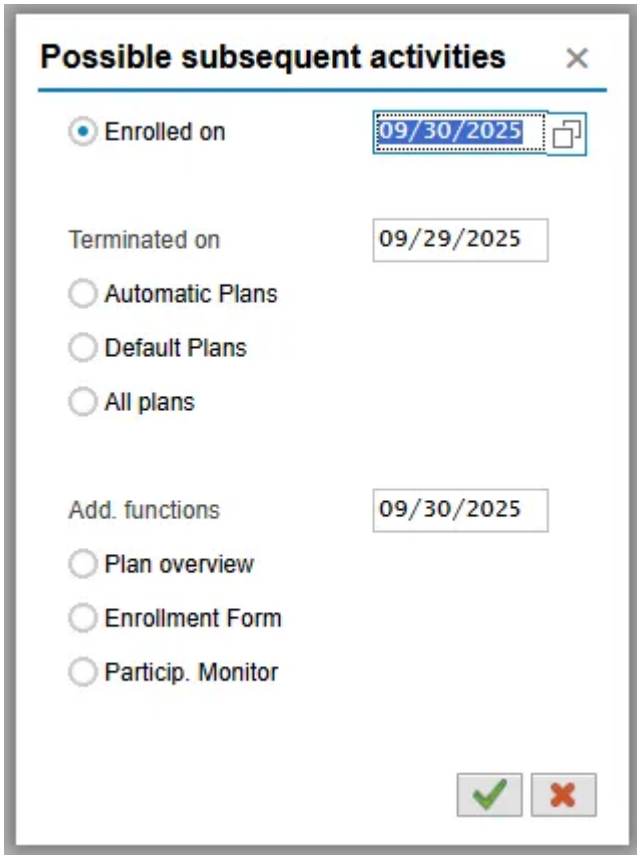
The defaulted work schedule is based on information provided by the various agencies and the Integrated HR-Payroll System team members.

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

Step 33: Click **Enter**.

Step 34: Click the **Save (Ctrl+S)** button.

Image



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

Step 35: Click the **Cancel (F12)** button.

If you need to process changes to the benefits, click **Continue**. In this example we will not process changes to benefits and will click **Cancel**.

Image

Create Basic Pay (0008)

Menu | Salary amount | Payments and deductions

Personnel No	10000091	Name	Gina Lynn Naylor01		
EEGroup	A	SPA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active	
Start	09/30/2025	o	12/31/9999		

Subtype 0 Basic contract

Salary

Reason	Z9	Appointment Change	Cap.util.lvl	100.00	
PS type	07	General	WkHrs/period	173.33	Monthly
PS Area	01	Annual Salaries	Next inc.		
PS group	GN12	Level 02	Ann.salary	56,220.00	USD

Wag...	Wage Type Long Text	O...	Amount	Curre...	In...	A...	Number/Unit	Unit
1000	Regular Salary		4,685.00	USD		✓		

IV 09/30/2025 - 12/31/9999 4,685.00 USD

Step 36: Update the following field:

Field Name	Description	Values
Reason	Reason for the action, such as Appointment Change	Enter value in Reason. Example: Z9

Step 37: Click **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 Appointment Change [Z9] and click Enter to validate the data. Notice the Annual Salary field has retrieved the amount submitted via workflow (or the hourly field if appropriate).

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

The Cap. Util. lvl always should be 100%. The Annual Salary should be the amount you are paying the employee. If at 40 hrs/wk EE was paid $80,000 and now EE is only working 20 hrs/wk, the salary entered will be $40,000. You are paying 100% of $40,000.

Step 38: Click the **Save (Ctrl+S)** button.

Image

Create Basic Pay (0008)

Menu | Salary amount | Payments and deductions

Personnel No	10000091	Name	Gina Lynn Naylor01		
EEGroup	A	SPA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active	
Start	09/30/2025	to	12/31/9999		

Subtype: 0 Basic contract

Salary

Reason	Z9	Appointment Change	Cap.util.lvl	100.00	
PS type	07	General	WkHrs/period	173.33	Monthly
PS Area	01	Annual Salaries	Next inc.		
PS group	GN12	Level 02	Ann.salary	56,220.00	USD

Wag...	Wage Type Long Text	O...	Amount	Curre...	In...	A...	Number/Unit	Unit
1000	Regular Salary		4,685.00	USD		✓		

IV 09/30/2025 - 12/31/9999 4,685.00 USD

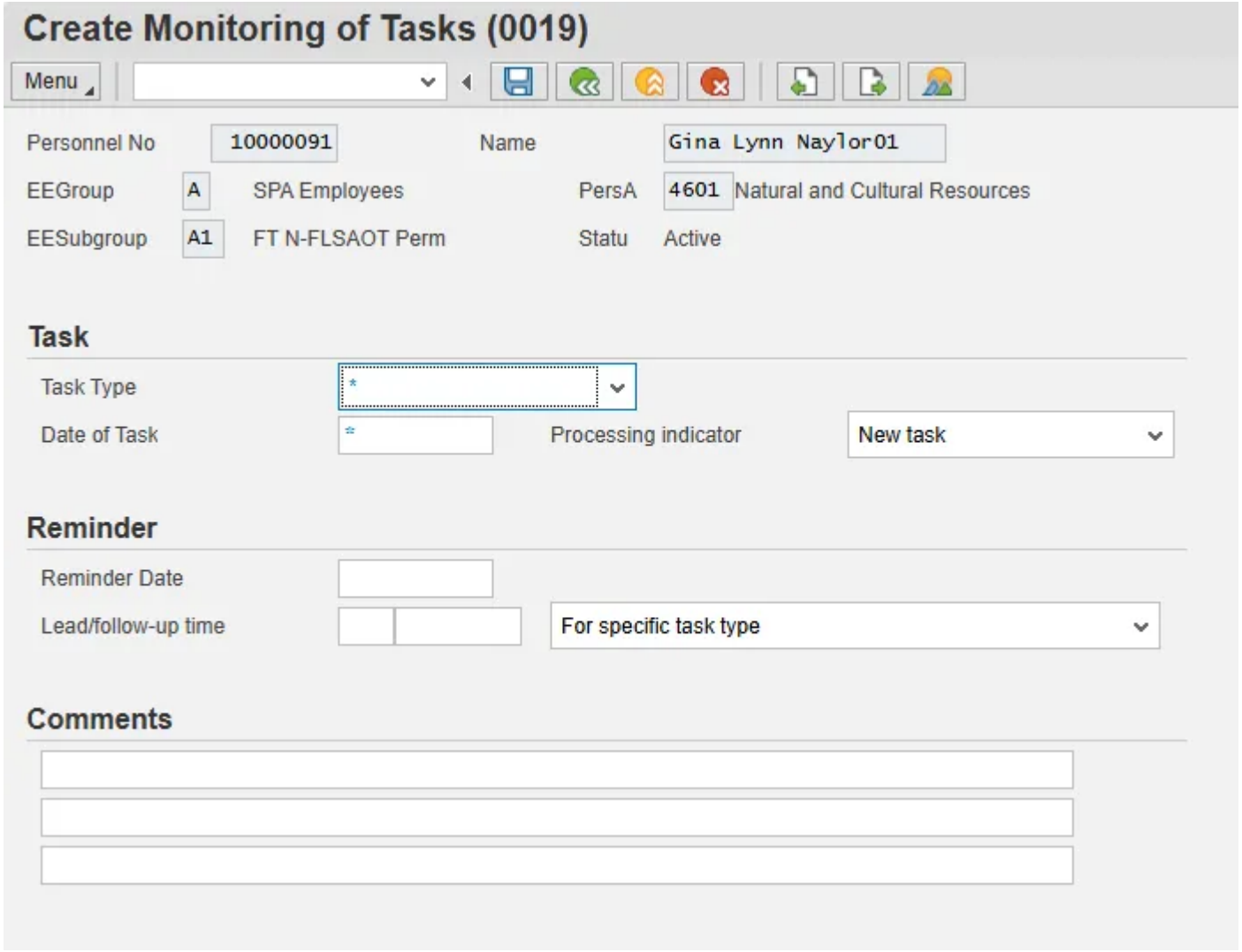
Some text turns red and a yellow message appears in the lower left corner indicating Record valid from 07/01/2019 to 12/31/9999 delimited at end.

Image



Step 39: Click **Enter** to bypass the message.

Image



Step 40: Click the **Next record (Shift+F7)** button to bypass Create Monitoring of Tasks (0019).

Image

Copy Date Specifications (0041)

Menu

Personnel No	10000091		Name	Gina Lynn Naylor01	
EEGroup	A	SPA Employees	PersA	4601	Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active	
Start	09/30/2025	to	12/31/9999		

Date Specifications

Date type	Date	Date type	Date
01 Original Hire Date	08/01/2013	02 Agency Hire Date	08/01/2013

Step 41: Click **Enter**.

Step 42: Click the **Save (Ctrl+S)** button.

Image

Personnel Actions

Menu

Personnel no. 10000091

Name Gina Lynn Naylor01

EEGroup A SPA Employees

EESubgroup A1 FT N-FLSAOT Perm

From 09/30/2025

PersA 4601 Natural and Cultural Resources

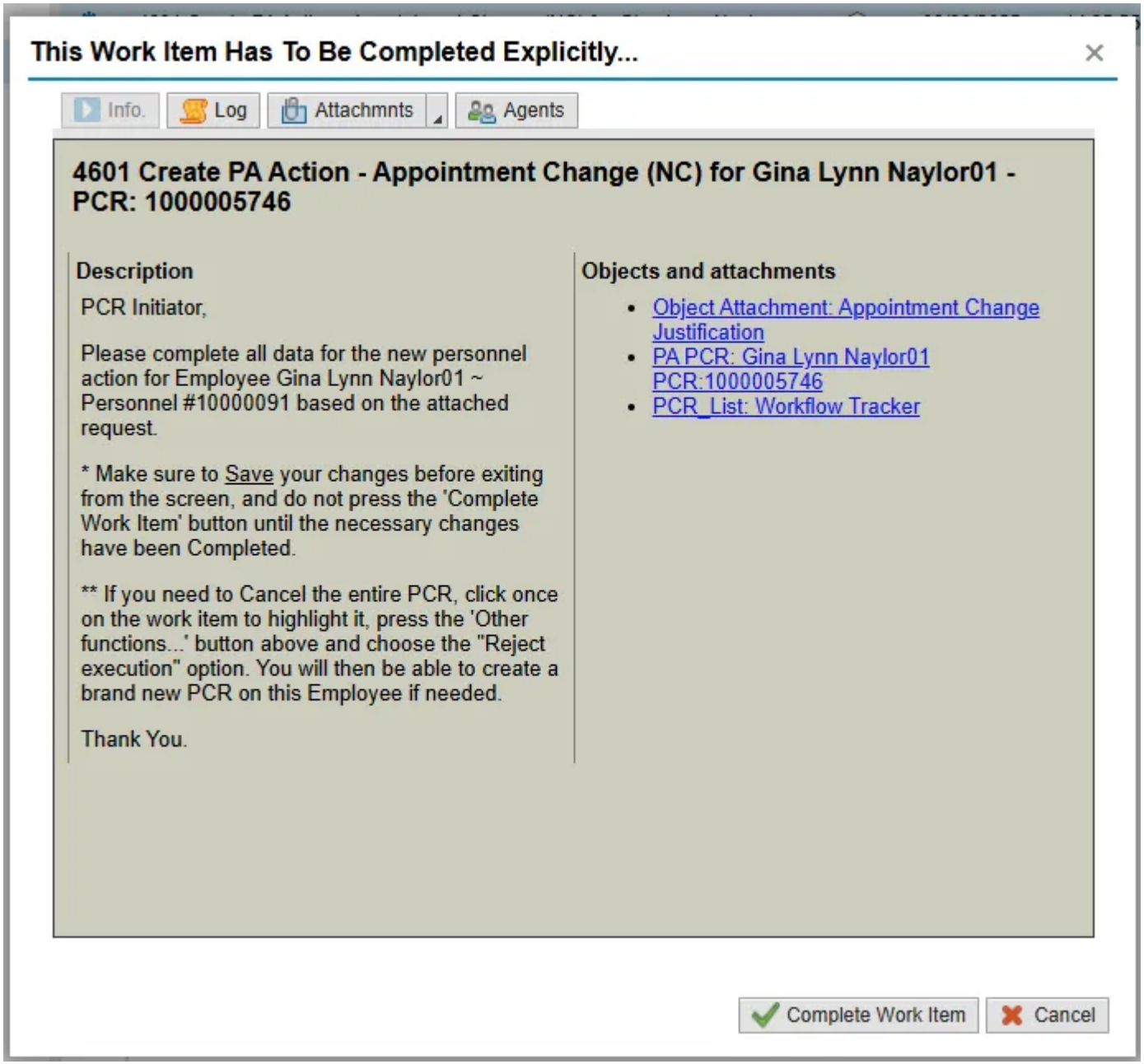
CostC 4699999999 CULTURE RESOURCES

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)			

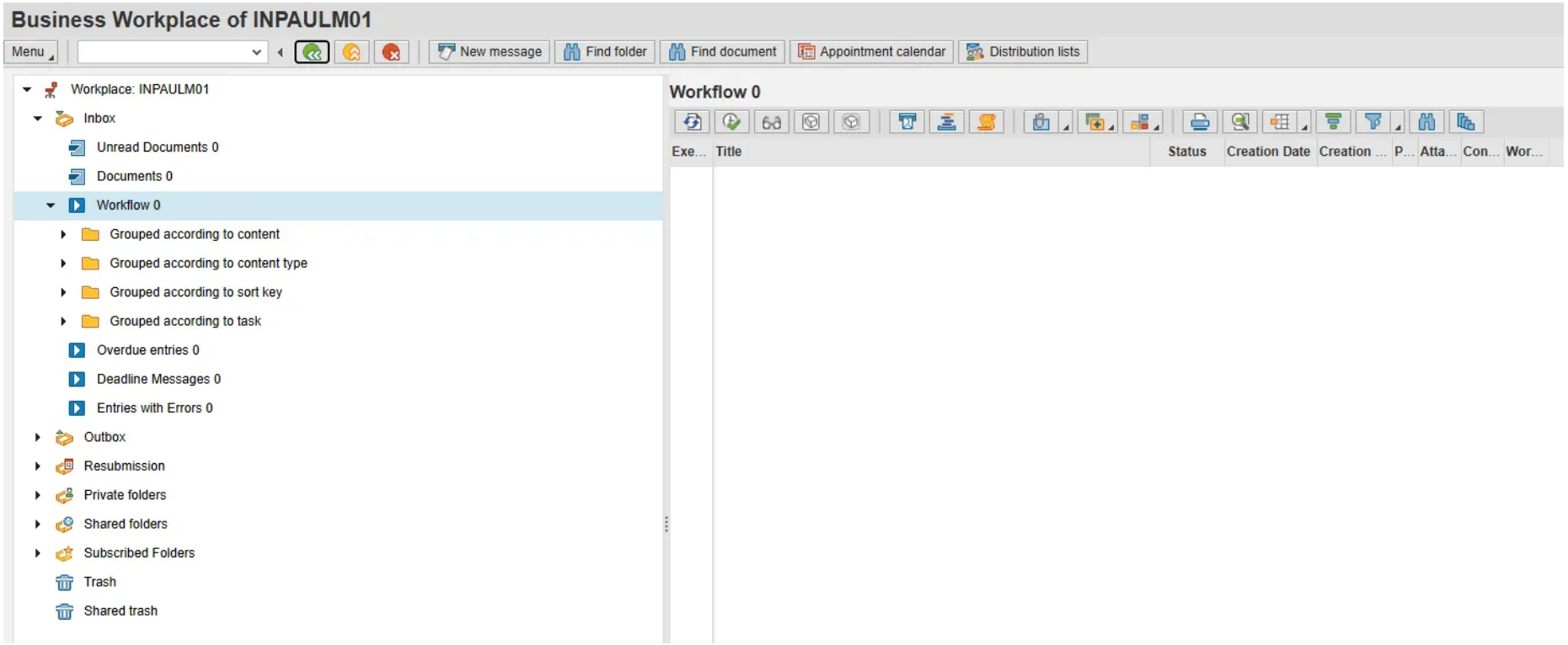
Step 43: Click the **Back (F3)** button.

Image


This Work Item Has To Be Completed Explicitly...
Info.
Log
Attachmnts
Agents
4601 Create PA Action - Appointment Change (NC) for Gina Lynn Naylor01 - PCR: 1000005746
Description
PCR Initiator,
Please complete all data for the new personnel action for Employee Gina Lynn Naylor01 ~ Personnel #10000091 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: Appointment Change Justification
PA PCR: Gina Lynn Naylor01 PCR:1000005746
PCR_List: Workflow Tracker
Complete Work Item
Cancel

Step 44: Click the **Complete Work Item** button.

Image



Step 45: Click the **Back (F3)** button.

The Appointment Change Action is complete, but we recommend reviewing via PA20 all infotypes that have been processed.

First Published

Fri, 05/08/2015

Last Updated

Fri, 02/13/2026

Printable PDF