



NEW HIRE ACTION

PER-71 | TRANSACTIONS ZPAA076, SBWP, PA40

PA

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

Trigger: There is a need to process a New Hire Action for one of the reasons listed in the Business Process Procedure Overview section.

Business Process Procedure Overview:

A New Hire action needs to be initiated when a Supervisor/Manager notifies HR of the initial employment of an individual to a position. This New Hire action form will be completed and submitted via workflow and will be assigned a PCR number (personnel change request number). This PCR will proceed through the workflow approval levels as defined by the business process, and when complete, will come back to the Initiator's inbox for processing. The Initiator will open the approved New Hire PCR request, process the New Hire action, and when completed with all infotypes, click Complete on the PCR request.

As the initiator, you will use the Employee Request Form to create a New Hire Action workflow request for an employee. You will review the workflow item and use the standard workflow functions as appropriate to:

1. View the workflow log
2. View the workflow tracker
3. View the workflow header
4. View the priority classification

Once the PCR request has been approved, the initiator/requestor will process the New Hire action, which begins from the approved PCR item in the SAP inbox.

The new hire action is executed after several steps have been completed and appropriate authorization has been received. When a vacancy of an existing position has occurred or a new position has been approved and established by the State and the vacancy has been posted in accordance with state policy, interviews with all qualified candidates will be completed. The State then completes and approves a recommendation package. The candidate receives and accepts an offer. The HR Administrator gathers the necessary employee data (from employee application and other documents gathered such as Employee Name, Work Schedule, Salary, Position Number, and Effective Date) and initiates the New Hire Action Personnel Change Request (PCR) form within workflow using transaction ZPAA076.

The New Hire action is used to generate a Personnel No and HR Master Data for:

- A new employee who has not worked for the State of North Carolina. In this situation the Reason for Action is 01 – New Hire.
- Perform the New Hire Action when an 'Approved Recommendation Package' is received from the department to hire a person.

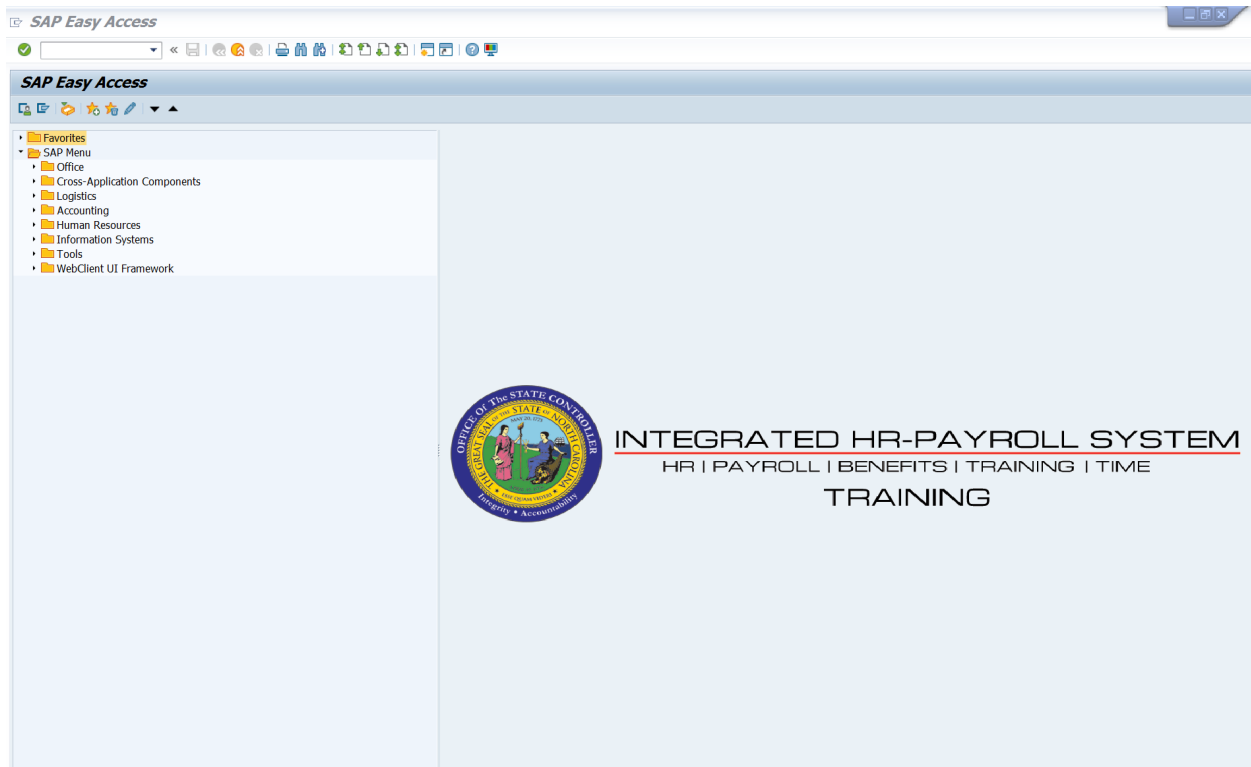
NOTE: There is an additional reason for New Hire, 02 National Guard. This reason will be addressed in a separate Job Aid, since there are less infotypes available for this reason.

Access Transaction:

Via Menu Path: This is a custom transaction. It is not located in the SAP Menu path.

Via Transaction Code: ZPAA076


Procedure



1. Update the following field:

Field Name	Description	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	Enter value in Command. Example: ZPAA076

2. Click the **Enter**  button.



Information

You may want to enter this transaction code in your Favorites folder.

- Choose **Favorites > Insert Favorites**
- Type in **ZPAA076**
- Click **Enter**.

To see the transaction code displayed in front of the link in your favorites:

- Choose **Edit > Settings**
- Place a check next to **Display Technical Name**
- Click **Enter**

Employee Action Request

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Existing PCR No.

Personnel No.

Last 4 digits (SSN) First Last


Effective on

Action Type New Hire (NC)

Reason New Hire

3. Update the following fields:

Field Name	Description	Values
Last 4 digits (SSN)	The last 4 digits of the employee’s social security number	Enter value in Last 4 digits (SSN). Example: 5252
First	The employee's first name	Enter value in First. Example: Matthew
Last	The individual's legal last name	Enter value in Last. Example: McKinney
Effective on	The date on which the action will be effective	Enter value in Effective on. Example: 05/16/2011
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: Z0
Reason	Reason for the action, such as New Hire	Enter value in Reason. Example: 01



Information

As of 3/18/08, the last 5 digits of the social security number are no longer required. This has been changed to require only the last 4 digits of the social security number. This piece of an employee's social security number is required only for New Hire actions where the employee does not have a Personnel Number already.

For the New Hire action Z0 there are two reason codes available from which to choose. **01** is for new hire; **02** is for the National Guard. You can use the matchcode drop-down or type the code in the field.

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.

Once you have entered all data, click Enter to validate the data and display the associated text with the data choices made.

Information is inherited from the position Personnel Area, Employee Group and Employee Subgroup. If employee information is different, you can change it here. For example, if the position has defaulted to F-A1 (FT N-FLSAOT Perm), but the employee is in a probationary status, change the Employee Group to A2 FT N-FLSAOT Prob, which is what the employee will be until their probationary period is complete.

*Fields with check marks are mandatory.

Employee Action Request

Initiate WF

PCR Number

Personnel Number Matthew McKinney Action: New Hire (NC)

Last 4 digits(SSN) Matthew McKinney Reason: New Hire

Effective on Chng St:

CURRENT	PROPOSED
Pers.Area <input type="text"/>	Pers.Area <input type="text"/>
Subarea <input type="text"/>	Subarea <input checked="" type="checkbox"/>
EE Group <input type="text"/>	EE Group <input checked="" type="checkbox"/>
EE Subgroup <input type="text"/>	EE Subgrp <input checked="" type="checkbox"/>
Org. Unit <input type="text" value="00000000"/>	Org. Unit <input type="text" value="0"/>
Job <input type="text" value="00000000"/>	Job <input type="text" value="0"/>
EE Position <input type="text" value="00000000"/>	EE Position <input checked="" type="checkbox"/>

Basic Pay

Pay Scale type <input type="checkbox"/>	Pay Scale type <input checked="" type="checkbox"/>
Pay Scale Area <input type="text"/>	Pay Scale Area <input checked="" type="checkbox"/>
Pay Scale Group <input type="text"/> Level <input type="checkbox"/>	Pay Scale Group <input checked="" type="text"/> Level <input checked="" type="checkbox"/>
Annual Salary <input type="text" value="0.00"/> Hrly Sal <input type="text" value="0.00"/>	Annual Salary <input type="text"/> Hourly Salary <input type="text"/>
	<input type="text" value="0.00"/>
Min <input type="text" value="0.00"/>	Max <input type="text" value="0.00"/> Next Inc Date <input type="text"/>

4. Click the **Create (F5)**  button.

Employee Action Request

Initiate WF

PCR Number

Personnel Number Matthew McKinney Action: New Hire (NC)

Last 4 digits(SSN) Matthew McKinney Reason: New Hire

Effective on Chng St:

CURRENT		PROPOSED	
Pers.Area	<input type="text"/>	Pers.Area	<input type="text" value="4601"/> Cultural Resources
Subarea	<input type="text"/>	Subarea	<input type="text" value="NC01"/> 7day Norm
EE Group	<input type="text"/>	EE Group	<input type="text" value="A"/> SPA Employees
EE Subgroup	<input type="text"/>	EE Subgrp	<input type="text" value="A2"/> FT N-FLSAOT Prob
Org. Unit	<input type="text" value="00000000"/>	Org. Unit	<input type="text" value="20010125"/> CR CDS CABSEC Bds & Com...
Job	<input type="text" value="00000000"/>	Job	<input type="text" value="30001506"/> Museum Curator
EE Position	<input type="text" value="00000000"/>	EE Position	<input type="text" value="60083990"/> Curator Of Furnishings & Deco...

Basic Pay

Pay Scale type Pay Scale type Graded

Pay Scale Area Pay Scale Area Annual Salaries

Pay Scale Group Level Pay Scale Group Level

Annual Salary Hrly Sal Annual Salary Hourly Salary


Calc Step - +MP

Min

Max Next Inc Date

5. Update the following fields:

Field Name	Description	Values
EE Position	Position number assigned to the employee	Enter value in EE Position. Example: 60083990
Level	Level assigned to the Position	Enter value in Level. Example: GR
Annual Salary	Employee's annual basic pay	Enter value in Annual Salary. Example: 52,500.00



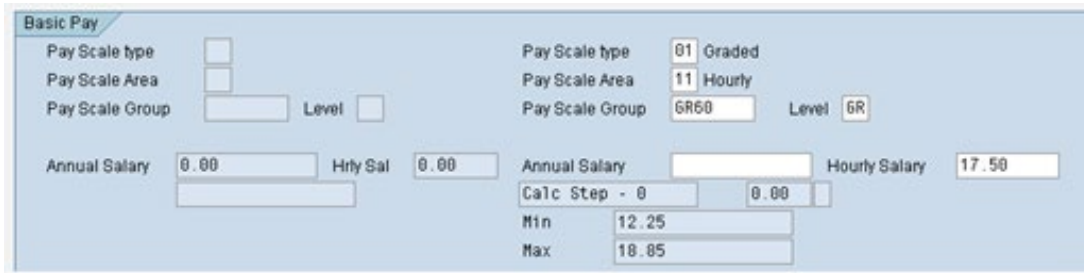
Information OSC recommends entering the EE Position number in first, so the Personnel Area, Personnel Subarea, Employee Group, Employee Subgroup and Pay information pre-populate based on the position number entered.

You can then change fields as necessary (for example, if the employee will be probationary, you may want to change the Employee Subgroup). If you do not enter the position number first, the pre-population of data based on the position number may not work properly.

Once you have entered the EE Position number, click Enter to request SAP pre-fill fields on the screen.

The Job assignment to a graded position will default the compensation structure data (payscale type,ayscale area, andayscale group). If you are hiring into a banded position, the position itself will have default values to propose in the compensation area.

6. Click the **Enter**  button.



The screenshot shows a 'Basic Pay' form with the following fields and values:

- Pay Scale type:
- Pay Scale Area:
- Pay Scale Group: Level:
- Annual Salary: Hly Sal:
- Pay Scale type: 01 Graded
- Pay Scale Area: 11 Hourly
- Pay Scale Group: 6R50 Level: 6R
- Annual Salary: Hourly Salary: 17.50
- Calc Step - 0: 0.00
- Min: 12.25
- Max: 18.85

7. Update the following field (only if hiring a Temporary employee):

Field Name	Description	Values
Pay Scale Area	A pay scale area is a special area in which a collective agreement is valid. Hourly salary is used only for Temporary employees. You will need to change the Pay Scale Area to Hourly if using this field.	Enter value in Pay Scale Area. Example: 11
Hourly Salary	The hourly rate	Enter value in Hourly Salary. Example: 17.50


8. Click the **Enter**  button.

TIP: Click Enter after entering the Salary or Hourly rate, and additional fields will be validated and pre-populated.

9. Click the **Save (Ctrl+S)**  button.

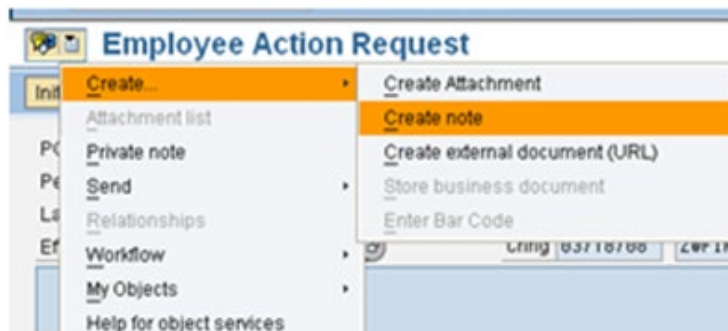


10. Click the **Enter**  button.



Information

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.



11. Click the **Services for Object**  button.

12. 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:

<https://www.osc.nc.gov/documents/action-notes-template>

13. 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: New Hire Justification
Long text	An open text field	Enter value in long text. Example: the appropriate note



Information

The attached note can be entered here after saving the PCR prior to initiating workflow, or after submitting workflow in the display mode of the PCR. The note will remain with the PCR. The note will not transfer to the Action process (such as a New Hire process), but will remain with the PCR, and can be copied from the PCR and pasted into a note on the Action when processed. This means that the information must be entered in two places - on the PCR and on the Action.

14. Click the **Enter**  button.

Employee Action Request

Initiate WF

PCR Number: 1000005272
 Personnel Number: Matthew McKinney
 Last 4 digits(SSN): 5252 Matthew McKinney
 Effective on: 05/16/2011 Chng: 05/17/11 ZWFINOMPA031 St: D Created

CURRENT		PROPOSED	
Pers.Area		Pers.Area	4601 Cultural Resources
Subarea		Subarea	NC01 7day Norm
EE Group		EE Group	A SPA Employees
EE Subgroup		EE Subgrp	A2 FT N-FLSAOT Prob
Org. Unit	00000000	Org. Unit	20010125 CR CDS CABSEC Bds & Com...
Job	00000000	Job	30001506 Museum Curator
EE Position	00000000	EE Position	60083990 Curator Of Furnishings & Deco...

Basic Pay

Pay Scale type		Pay Scale type	01 Graded
Pay Scale Area		Pay Scale Area	01 Annual Salaries
Pay Scale Group		Pay Scale Group	GR70 Level GR
Annual Salary	0.00	Annual Salary	52,500.00
Hrly Sal	0.00	Hourly Salary	
		Calc Step - +MP	100.00
		Min	38,174.00
		Max	61,632.00
		Next Inc Date	

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



16. Click the **Enter**  button.

Employee Action Request

Initiate WF

PCR Number: 1000005272
 Personnel Number: Matthew McKinney
 Last 4 digits(SSN): 5252 Matthew McKinney
 Effective on: 05/16/2011 Chng: 05/17/11 ZWFINOMPA031 St: D Created

CURRENT		PROPOSED	
Pers.Area		Pers.Area	4601 Cultural Resources
Subarea		Subarea	NC01 7day Norm
EE Group		EE Group	A SPA Employees
EE Subgroup		EE Subgrp	A2 FT N-FLSAOT Prob
Org. Unit	00000000	Org. Unit	20010125 CR CDS CABSEC Bds & Com...
Job	00000000	Job	30001506 Museum Curator
EE Position	00000000	EE Position	60083990 Curator Of Furnishings & Deco...

Basic Pay

Pay Scale type		Pay Scale type	01 Graded
Pay Scale Area		Pay Scale Area	01 Annual Salaries
Pay Scale Group		Pay Scale Group	GR70 Level GR
Annual Salary	0.00	Annual Salary	52,500.00
Hrly Sal	0.00	Hourly Salary	
		Calc Step - +MP	100.00
		Min	38,174.00
		Max	61,632.00
		Next Inc Date	

17. Click the **Initiate WF**  button.

Select the **Initiate Workflow** button to send the New Hire 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).



18. Click the **Enter**  button.

The next steps show the process for displaying the data for any PCR, including notes and/or attachments. **No changes can be processed on any PCR which is in the approval process or has been approved.**

Employee Action Request

Existing PCR No.

Personnel No.

Last 4 digits (SSN) First Last

Effective on

Action Type

Reason

19. Update the following field:

Field Name	Description	Values
Existing PCR No.	Personnel Change Request number	Enter value in Existing PCR No. Example: 1000005272

20. Click the **Change (F6)**  button.

Employee Action Request

Existing PCR No.

Personnel No.

Last 4 digits (SSN) First Last

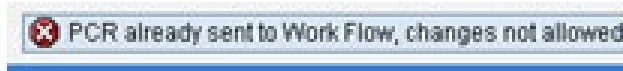
Effective on

Action Type New Hire (NC)

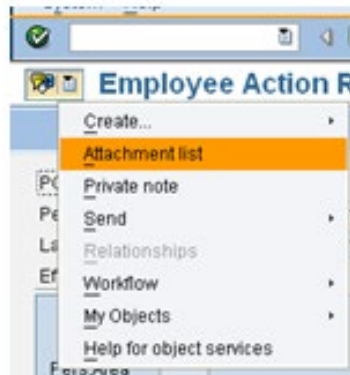
Reason New Hire

21. Click the **Display (F7)**  button.

Notice that you are not able to change a PCR if it has already been submitted to workflow via the Initiate Workflow button. Notice the error message at the bottom of the screen. Once the PCR has been submitted, you will be able to display the data (including any notes and attachments which may have been saved on the PCR).

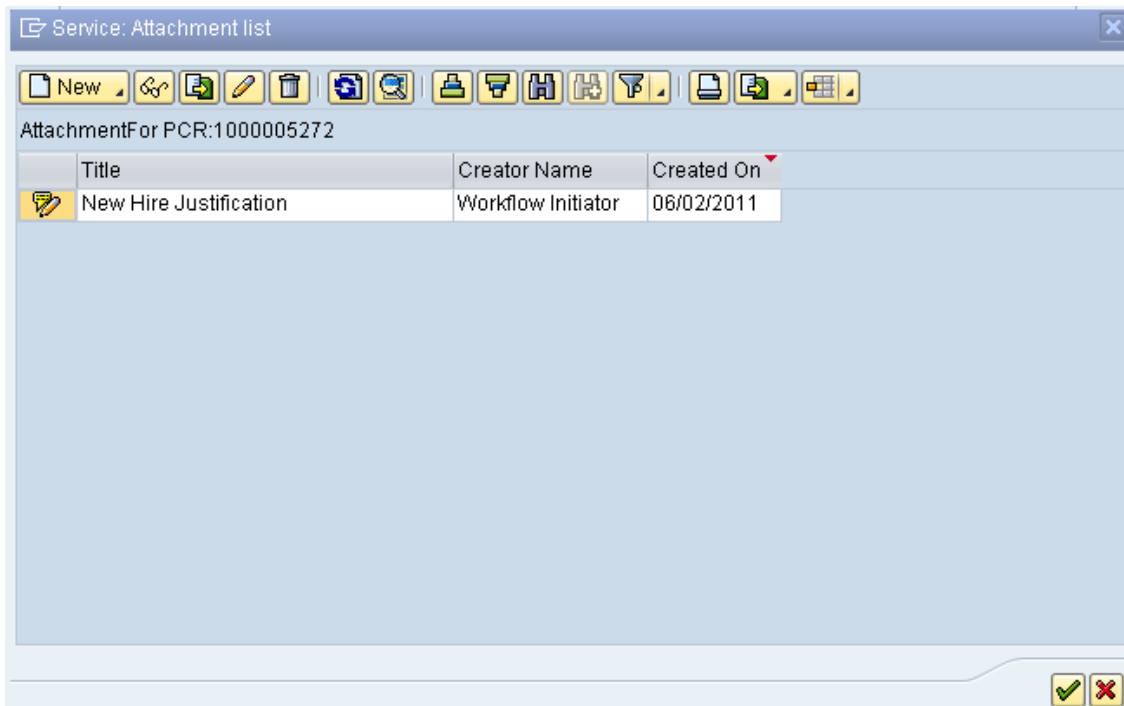


22. Click the **Services for Object**  button.



23. Click the **Attachment list** option in the drop-down menu list.

The PCR information is displayed. At any time, to display the notes/attachments on this PCR, choose the Services for Objects button and if the Attachments option is valid, there is at least one attachment available.

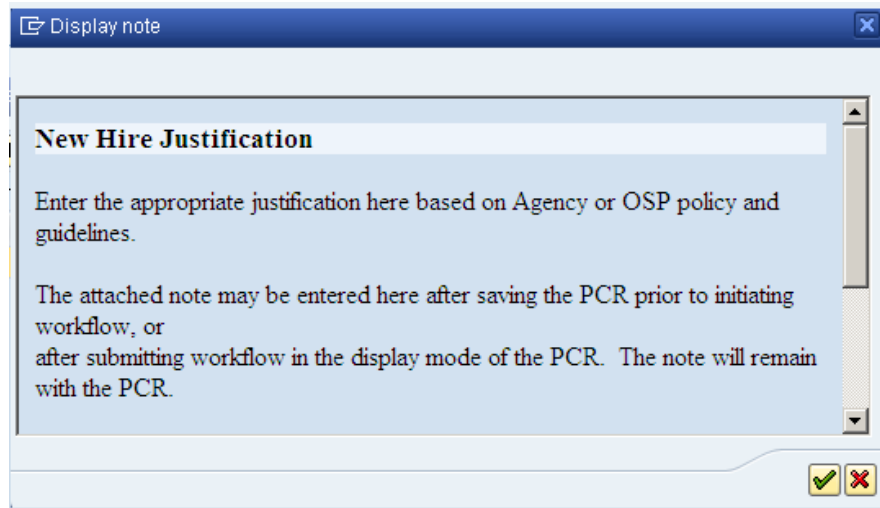


24. Select the **Title** New Hire Justification row.

25. Click the **Display**  button.

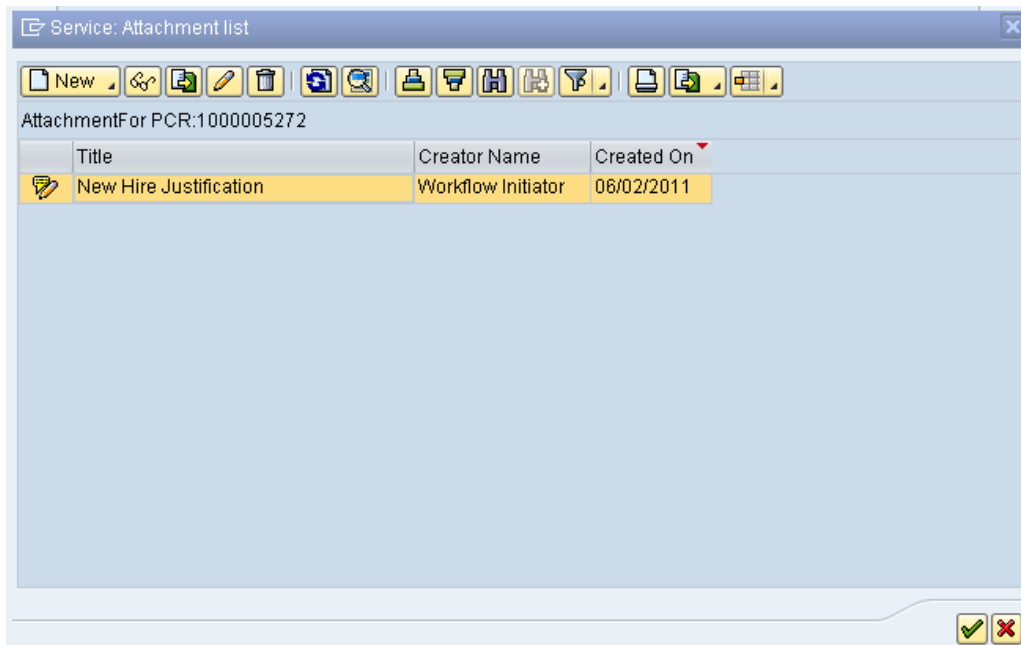
If you receive a window requesting you to choose between PCR attachments, choose the attachment corresponding to the PCR number with which you are working. This extra window does not display normally.

If multiple notes and/or attachments have been added to this PCR, they will be listed here. This is where you would display and copy the data if you wanted to attach the notes/attachments to the corresponding Action once approved.



26. Click the **Enter**  button.

Review the information as appropriate and close the window when complete. This text may be copied using CTRL+C and pasted using CTRL+V into another note attached to an Action.



27. Click the **Enter**  button.

Employee Action Request

PCR Number	<input type="text" value="1000005272"/>	Personnel Number	<input type="text" value="Matthew McKinney"/>	Action:	<input type="text" value="Z0"/>	New Hire (NC)	
Last 4 digits(SSN)	<input type="text" value="5252"/>	<input type="text" value="Matthew"/>	<input type="text" value="McKinney"/>	Reason:	<input type="text" value="01"/>	New Hire	
Effective on	<input type="text" value="05/16/2011"/>	Chng	<input type="text" value="06/02/11"/>	ZWFINOMPA031	St:	<input type="text" value="A"/>	Approved

CURRENT	PROPOSED
Pers.Area <input type="text"/>	Pers.Area <input type="text" value="4601"/> Cultural Resources
Subarea <input type="text"/>	Subarea <input type="text" value="NC01"/> 7day Norm
EE Group <input type="text"/>	EE Group <input type="text" value="A"/> SPA Employees
EE Subgroup <input type="text"/>	EE Subgrp <input type="text" value="A2"/> FT N-FLSAOT Prob
Org. Unit <input type="text" value="00000000"/>	Org. Unit <input type="text" value="20010125"/> CR CDS CABSEC Bds & Com...
Job <input type="text" value="00000000"/>	Job <input type="text" value="30001506"/> Museum Curator
EE Position <input type="text" value="00000000"/>	EE Position <input type="text" value="60083990"/> Curator Of Furnishings & Deco...

Basic Pay

Pay Scale type <input type="text"/>	Pay Scale type <input type="text" value="01"/> Graded
Pay Scale Area <input type="text"/>	Pay Scale Area <input type="text" value="01"/> Annual Salaries
Pay Scale Group <input type="text"/> Level <input type="text"/>	Pay Scale Group <input type="text" value="GR70"/> Level <input type="text" value="GR"/>
Annual Salary <input type="text" value="0.00"/> Hrly Sal <input type="text" value="0.00"/>	Annual Salary <input type="text" value="52,500.00"/> Hourly Salary <input type="text" value="0.00"/>
	Calc Step - +MP <input type="text" value="100.00"/>
	Min <input type="text" value="38,174.00"/>
	Max <input type="text" value="61,632.00"/> Next Inc Date <input type="text"/>

Dates

Last day worked	<input type="text"/>
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28. Click the **Back (F3)**  button.

29. The Initiate New Hire Action is complete.

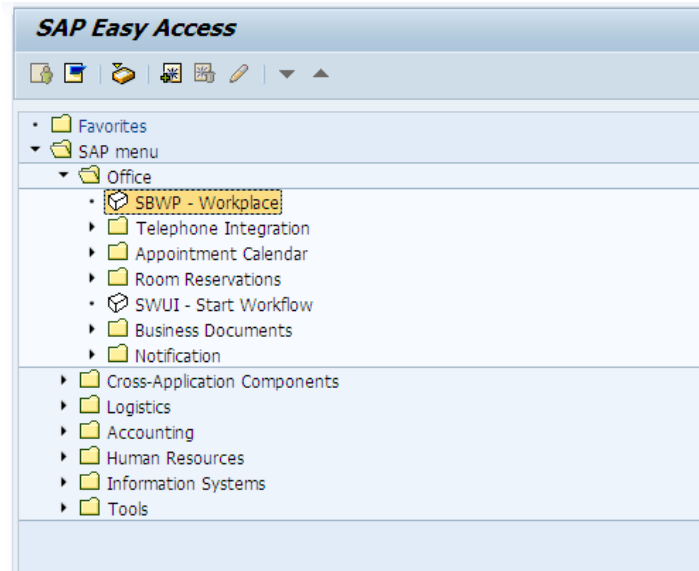
After Workflow Approvals have been received, proceed with the Complete New Hire Action process.

Instructions for Completing the Action


Access Transaction:

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

Via Transaction Code: SBWP, PA40



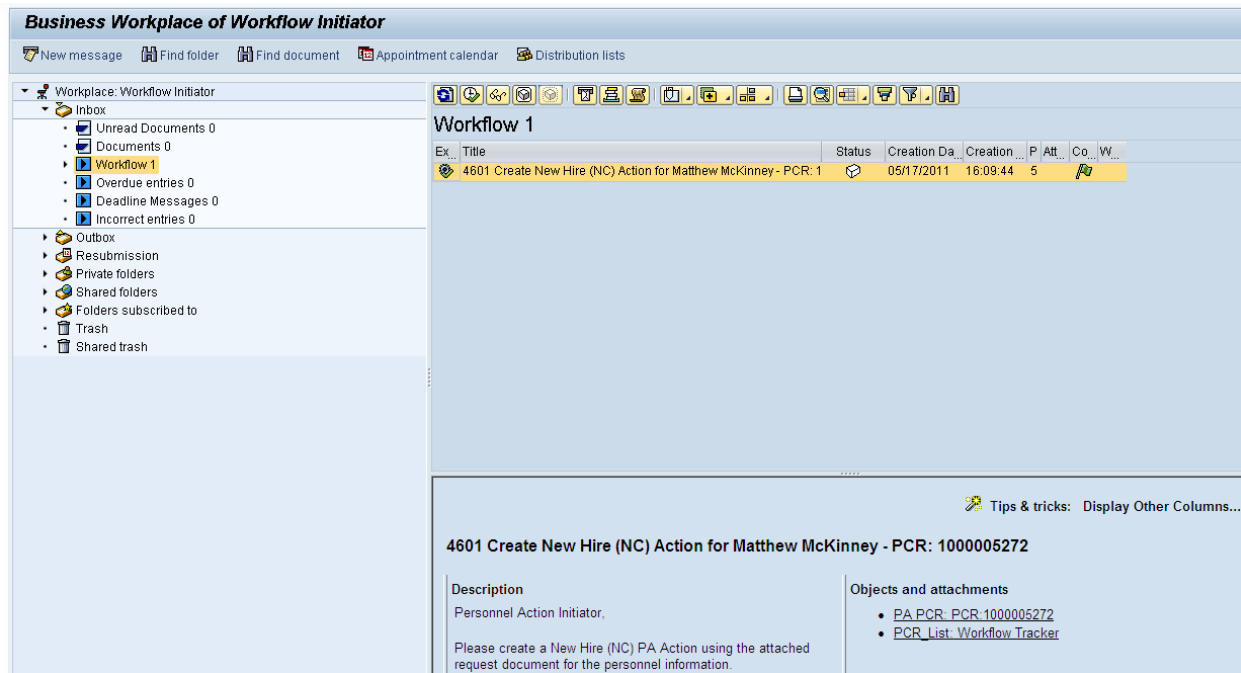
30. Click the **SAP Business Workplace (Ctrl+F12)**  button.

 CRITICAL!	<p>These instructions assume you have initiated the New Hire Personnel Change Request (PCR) in workflow already, and you have an approved PCR ready to be processed as a New Hire in the system.</p>
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31. **Select Inbox >> Workflow.**

You can process using step 32 or step 33.



32. Select the **PCR 4601 PA Action - New Hire (NC) for Matthew McKinney PCR: 1000005272** row. Double-click on row.

A list of your approved (or rejected) PCRs are listed on the right side of the screen. You can view the PCR details and/or Workflow Tracker details prior to executing the PCR if desired. After the PCR is executed, the New Hire action will be launched.

33. Click the **Execute**  button.

Hiring Action

Personnel No.

Start Date

Name

Last name

First name

Middle name

HR data

SSN

Date of Birth

Gender

Female Male

34. Update the following fields:

Field Name	Description	Values
SSN	Social security number	Enter value in SSN. Example: 888885252
Date of Birth	The individual's date of birth	Enter value in Date of Birth. Example: 02/16/1989

35. Click the appropriate gender Male check box.

Information


The last 4 digits of the Social Security number must match the numbers entered when initiating the PCR. If they do not match, the system will notify you that you do not have a valid, approved PCR and will not let you process the New Hire action.

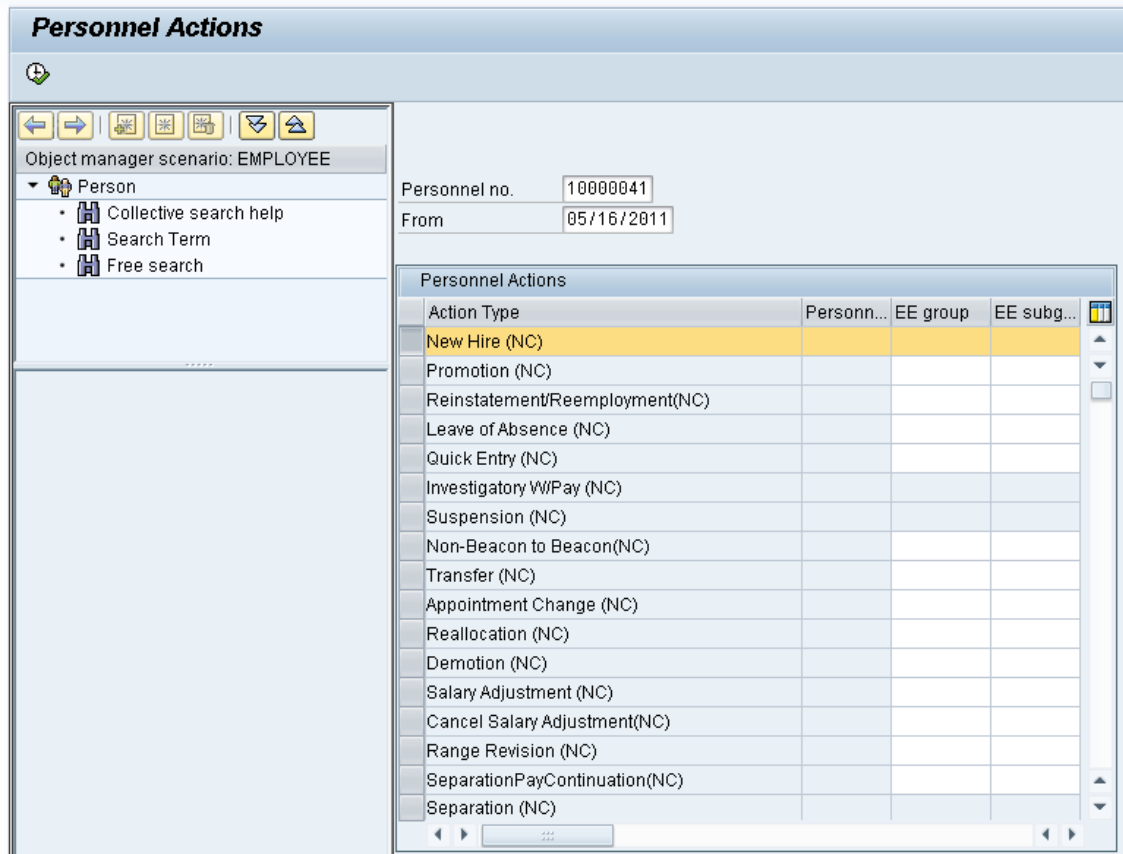
The Start Date is the effective date of the New Hire action.

Add the Middle Name - the information entered on this screen will populate infotype 0002 Personal Data.

CRITICAL!

You CANNOT enter a dummy/temporary social security number. Once infotype 0002 is saved you must contact BEST HR to be maintained.

36. Click the **Execute (F8)**  button to retrieve the Personnel number from Orbit.




37. Update the following field:

Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From. Example: 05/16/2011

Notice that the Personnel Number has pre-populated here. This is the employee's Personnel Number, generated as a unique number from the Orbit retirement system.

The From date is the effective date of the New Hire action, or the date the employee "enters on duty." If the first day of the month falls on a non-work day and the employee starts to work on the first available work day, the effective date would be on the first of the month.







Information

Throughout this action, you will be asked to review and Save each infotype, even if you are not entering any new data. The system may pre-populate some infotypes based on previous choices. Other infotypes will display dynamically based on which infotypes have been saved. If you simply click Next through an infotype, the record is not saved, and background processing may not work correctly.

38. Highlight the **New Hire (NC)** action type.

39. Click the **Execute (F8)**  button.


Create Actions (0000)

    Change info group

Pers.No.

Start to

Personnel action


Action Type 


Reason for Action New Hire

Reference Pers. Nos.

Status

Customer-specific

Employment 

Special payment 

Organizational assignment

Position Curator Of Furnishings &

Personnel area Cultural Resources

Employee group SPA Employees

Employee subgroup FT N-FLSAOT Prob

Additional actions


Start Date	Act.	Action Type	ActR	Reason for action

40. Click the **Enter**  button.

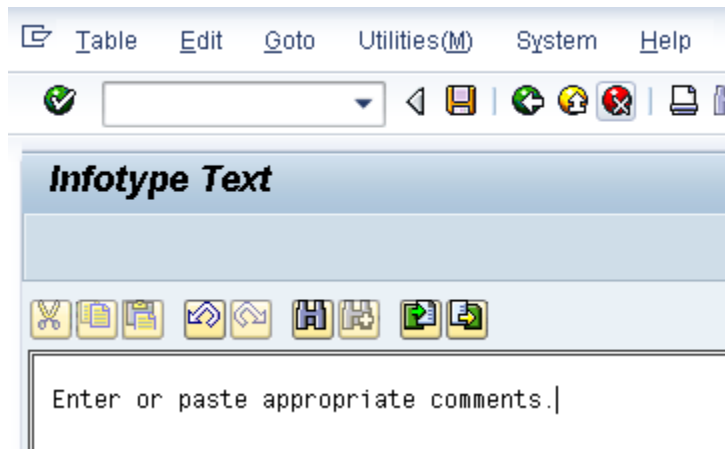
41. The open fields will pre-populate from the approved PCR.


Best practice is to review all data and click Enter to allow the system to validate the data.

A New Hire is usually probationary; therefore, you would have changed the default Employee Subgroup on the PCR so to reflect probationary. After the probationary period has ended, another Action (Appointment Change) will be used to change the Employee Subgroup to permanent). When the employee subgroup is different from the position employee subgroup you will receive a warning message.




 Person and position have different employee groups/subgroups

42. Click **Enter**  to continue.



- 43. Click **Edit**, >> **Maintain text** to add your comment based on agency or OSHR Policy/Guidelines.
Remember you can cut and paste from the PCR.
- 44. Click the **Save (Ctrl+S)**  button.

Create Personal Data (0002)

Personnel No

Statu Active

Start To

Name

Title <input type="text"/>	Name Format <input type="text"/>
Last name <input type="text" value="McKinney"/>	Birth name <input type="text"/>
First name <input type="text" value="Matthew"/>	Initials <input type="text"/>
Middle name <input type="text" value="Lee"/>	Nickname <input type="text"/>
Designation <input type="text"/>	
Suffix <input type="text"/>	
Name <input type="text" value="Matthew Lee McKinney"/>	

HR data

SSN <input type="text" value="888-88-5252"/>	Gender <input type="radio"/> Female <input checked="" type="radio"/> Male
Date of Birth <input type="text" value="02/16/1989"/>	
Language <input type="text" value="English"/>	
Marital Status <input type="text" value="Single"/>	Dependents <input type="text" value="1"/>

- 45. Select the appropriate **marital status** in the list box.
Choose the appropriate marital status. If nothing is selected, **Single** will default.

46. Update the following field:

Field Name	Description	Values
Dependents	The number of dependents an individual has	Enter value in Dependents. Example: 1

47. 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.

Choose the Marital Status, and if appropriate, enter the number of Dependents this employee has. If you enter one or more dependents, the system will display a separate screen for each dependent to enter their personal information. In this example we will enter one dependent.

48. Click the **Save (Ctrl+S)**  button.

Create Family Member/Dependents (0021)

Personnel No

Start To Statu Active

Member Child no

Personal data

Last name Birth name

First name Initials

Title Nationality

Gender Female Male

Birth date Ref.Pers.No.

SSN Telephone number

Street Separation Date

Addr Line 2 Marital status

City/State

Zip/country

Challenge

Disability

Disability Date

Learned

Status

Student Indicator

49. Update the following field:

Field Name	Description	Values
First name	The individual's legal first name	Enter value in First name. Example: Lisa

50. Click the **Female** Female radio button.

Choose Female or Male.

51. Update the following field:

Field Name	Description	Values
Birth date	The individual's date of birth	Enter value in Birth date. Example: 01/01/1985

52. 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.

Enter all of the available data on the dependent(s), review, and click Save.

If you do not have this information, the employee can complete this data through Employee Self-Service (ESS).

53. Click the **Save (Ctrl+S)**  button.

Create Organizational Assignment (0001)

Org Structure

Personnel No Status

Start to

Enterprise structure

CoCode STATE OF NC
 Pers.area Cultural Resources Subarea 7day Norm
 Cost Ctr CULTURE RESOU... Bus. Area Cultural Resources
 Fund CULTURE- SUSP ...
 Func. Area General Government

Personnel structure

EE group SPA Employees Payr.area NC Monthly
 EE subgroup FT N-FLSAOT Prob Contract

Organizational plan

Percentage

Position 808010002755
 Curator Of Furnishing...

Job key Msm Cur
 Museum Curator

Org. Unit 48010101020
 CR CDS CABSEC Bd...

Org.key

54. 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.

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

55. Click the **Save (Ctrl+S)**  button.






56. Click the **Yes**  button.

The system will ask for verification to delimit the vacant position. You are hiring an individual into the position, so the vacancy will be ended, or delimited.

If you don't click Yes, your vacancy report may be incorrect. This process of delimiting the vacancy updates IT1007 (Vacancy) on the Position.

Create Date Specifications (0041)

Personnel No Name

EEGroup SPA Employees PersA Cultural Resources

EESubgroup FT N-FLSAOT Prob Statu

Start to

Date Specifications			
Date type	Date	Date type	Date
<input type="checkbox"/> 01 Original Hire Date	<input type="text" value="05/16/2011"/>	<input type="checkbox"/> 02 Agency Hire Date	<input type="text" value="05/16/2011"/>
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

57. Click the **Save (Ctrl+S)**  button.

Information:

System defaults Date Types with Action Effective Date:

- 01 Original Hire Date
- 02 Agency Hire Date

Also, for specific Jobs in Judicial defaults Date Type:

- 04 Judicial Anniversary Date

Create Related Experience (9822)

Personnel No Name

EEGroup SPA Employees PersA

EESubgroup FT N-FLSAOT Perm Statu Active

Start To

(Not to be used for Supplemental Staff)

Classification

Position 800904001427
Facility Survey Consult I

Job Fac Survey C
Facility Survey Consultant I

Related Work Experience

Months Calculated Months:

Related Education

Months

58. 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.

Agency representative will need to enter the following fields:

- Related Work Experience
- Related Education Months

59. Click the **Save (Ctrl+S)**  button.

Create Addresses (0006)

Foreign address

Personnel No 10000041 Name Matthew Lee McKinney

EEGroup A SPA Employees PersA 4601 Cultural Resources

EESubgroup A2 FT N-FLSAOT Prob Statu Active

Start 05/16/2011 to 12/31/9999

Address

Address type Permanent residence

Care Of

Address line 1 4515 Wilmington St

Address line 2

City/county Raleigh Wake

State/zip code NC North Carolina 27611

Country Key USA

Telephone Number 919 779-5678

Communications

Type Number

Type Number

Type Number

Type Number

60. Update the following fields:

Field Name	Description	Values
Address line 1	The street number and address	Enter value in Address line 1. Example: 4515 Wilmington St
City/county	The city and county details for the address	Enter value in City/county. Example: Raleigh
City/county	The city and county details for the address	Enter value in City/county. Example: Wake
State/zip code	The state and zip code details for the address	Enter value in State/zip code. Example: NC

State/zip code	The state and zip code details for the address	Enter value in State/zip code. Example: 27611
Telephone Number Area Code	The individual's telephone number area code	Enter value in Telephone Number. Example: 919
Telephone Number	The individual's telephone number	Enter value in Telephone Number. Example: 779-5678

61. 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.




Enter address information as appropriate and available and click Save when complete.

The various communication fields are optional.

You can use the Tab key to tab through the fields.

62. Click the **Save (Ctrl+S)**  button.

Create Residence Tax Area (0207)

Personnel No	<input type="text" value="10000041"/>	Name	<input type="text" value="Matthew Lee McKinney"/>
EGroup	<input type="text" value="A"/> SPA Employees	PersA	<input type="text" value="4601"/> Cultural Resources
ESubgroup	<input type="text" value="A2"/> FT N-FLSAOT Prob	Statu	<input type="text" value="Active"/>
Start	<input type="text" value="05/16/2011"/> to	<input type="text" value="12/31/9999"/>	

Resident data

Tax area State of North Carolina

Tax Authorities in Area

Tax...	Description	T..	Description
FED	Federal	A	Federal
NC	North Carolina	B	State

63. 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.

If the employee resides in another state, that state should default from Infotype 0006 here.

NOTE: Always verify that the default information on the Create Residence Tax Area infotype is correct before saving.

64. Click the **Save (Ctrl+S)**  button.

Create Work Tax Area (0208)

Personnel No	10000041	Name	Matthew Lee McKinney
EEGroup	A SPA Employees	PersA	4601 Cultural Resources
EESubgroup	A2 FT N-FLSAOT Prob	Statu	Active
Start	05/16/2011	to	12/31/9999

Work Tax Data

Tax Area	NC	State of North Carolina
Allocation	100.00	%
Predominant Tax Area	No	


Tax Authorities in Area

Tax Auth.	Tax Authority Name	Tax Level	Description
NC	North Carolina	B	State

65. 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.

NOTE: Always verify that the default information on the Create Work Tax Area infotype is correct before saving.



CRITICAL!

The **Predominant Tax Area** field is used only for employees who work in and are taxed by multiple locations within Pennsylvania. This field will default to **No and should not be altered.**

66. Click the **Save (Ctrl+S)**  button.

Create Unemployment State (0209)			
Personnel No	10000041	Name	Matthew Lee McKinney
EGroup	A SPA Employees	PersA	4601 Cultural Resources
EESubgroup	A2 FT N-FLSAOT Prob	Statu	Active
Start	05/16/2011	to	12/31/9999
Unemployment data			
Tax authority	NC	North Carolina	
Worksite	24	Dept of Cultural Resources	




67. 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.

NOTE: Always verify that the default information on the Create Unemployment State infotype is correct before saving.

68. Click the **Save (Ctrl+S)**  button.

Create Withholding Info W4/W5 US (0210)

Personnel No Name


EEGroup SPA Employees PersA Natural and Cultural Resources

EESubgroup FT N-FLSAOT Perm Statu

Start to

Status

Tax authority Federal Tax level Federal

Filing Status 

Use Higher Withholding Rates Schedule

Exemptions

Credits for dep. USD

Tax Exempt Ind. IRS mandates

Foreign Earned Income

Withholding adjustments

Add.withholding USD Non-resident tax calculation

Default formula PCT MTHD-RES. U Alternative formula

Other income USD

Deductions USD

Additional Information

Check here if the last name differs from that shown on the Social Security card

Overrides (from Infotype 0234)

From date	End Date	Supplemental method	Tax override	Empl. Override Group

69. Click the **Enter**  button.

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

The default will be 03/Single or Married Filing Separately for the Filing Status field.

Employees with ESS (Employee Self-Service) access will be able to update their Withholding Information W4 via ESS.

70. Click the **Save (Ctrl+S)**  button.

Create Withholding Info W4/W5 US (0210)

Personnel No Name


EEGroup SPA Employees PersA Natural and Cultural Resources

EESubgroup FT N-FLSAOT Perm Statu Active

Start to

Status

Tax authority North Carolina Tax level State

Filing Status 

Exemptions

Allowances Exemption amount USD

Additional allowance Additional exemption amount USD

Personal allowance

Dependent allowance

Tax exempt indicator IRS mandates

Withholding adjustments

Add.withholding USD Add. percent

Default formula WITHHOLDING FOR Alternate formula

Additional Information

Check here if the last name differs from that shown on the Social Security card

Overrides (from infotype 234)

From date	End Date	Supplemental method	Tax override	Certificat...

71. Click the **Enter**  button.

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

The default will be 01/Single or Married Filing Separately for the Filing Status field.

72. Click the **Save (Ctrl+S)**  button.

Change Addresses (0006)

Personnel No 10000041 Name Matthew Lee McKinney

EEGroup A SPA Employees PersA 4601 Cultural Resources

EESubgroup A2 FT N-FLSAOT Prob Statu Active

Start 05/16/2011 to 12/31/9999 Changed on 06/02/2011 ZWFINOMPA031

Address

Address type Emergency contact

Care Of Mary McKinney

Address line 1 4515 Wilmington St

Address line 2

City/county Raleigh Wake

State/zip code NC North Carolina 27611

Country Key USA

Telephone Number 919 576-8978

Communications

Type Number

Type Number

Type Number

Type Number

73. Update the following fields:

Field Name	Description	Values
Care of	Individual to contact	Enter value in Care of. Example: Mary McKinney
Address line 1	The street number and address	Enter value in Address Line 1. Example: 4515 Wilmington St
City/county	The city and county details for the address	Enter value in City/county. Example: Raleigh
City/county	The city and county details for the address	Enter value in City/county. Example: Wake

State/zip code	The state and zip code details for the address	Enter value in State/zip code. Example: NC
State/zip code	The state and zip code details for the address	Enter value in State/zip code. Example: 27611
Telephone Number Area Code	The individual's telephone number area code	Enter value in Telephone Number. Example: 919
Telephone Number	The individual's telephone number	Enter value in Telephone Number. Example: 576-8978

74. Click the **Enter**  button.

75. Click the **Save (Ctrl+S)**  button.

If additional emergency numbers are needed, HR will enter them for the employee in the Communication area.

Enter the Emergency Contact information, review and click Save.

Create Addresses (0006)

Foreign address

Personnel No 10000041 Name Matthew Lee McKinney

EEGroup A SPA Employees PersA 4601 Cultural Resources

EESubgroup A2 FT N-FLSAOT Prob Statu Active

Start 05/16/2011 to 12/31/9999

Address

Address type Mailing address

Care Of

Address line 1 P. O. Box 12

Address line 2

City/county Raleigh Wake

State/zip code NC North Carolina 27604

Country Key USA

Telephone Number

Communications

Type Number

Type Number

Type Number

Type Number

76. Update the following fields:

Field Name	Description	Values
Address line 1	The street number and address	Enter value in Address Line 1. Example: P. O. Box 12
City/county	The city and county details for the address	Enter value in City/county. Example: Raleigh
City/county	The city and county details for the address	Enter value in City/county. Example: Wake
State/zip code	The state and zip code details for the address	Enter value in State/zip code. Example: NC
State/zip code	The state and zip code details for the address	Enter value in State/zip code. Example: 27604

Telephone Number Area Code	The individual's telephone number area code	Enter value in Telephone Number. Example: 919
Telephone Number	The individual's telephone number	Enter value in Telephone Number. Example: 707-1158

77. 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.

Only complete the Mailing Address screen if it is different from the permanent residence address. If no data entry is required, move to the next infotype screen by clicking the **Next Screen** button.

Employees will be able to manage their addresses via ESS (Employee Self-Service).

78. Click the **Save (Ctrl+S)**  button.

Create Monitoring of Tasks (0019)

Personnel No	<input type="text" value="10000041"/>	Name	<input type="text" value="Matthew Lee McKinney"/>
EEGroup	<input type="text" value="A"/> SPA Employees	PersA	<input type="text" value="4601"/> Cultural Resources
EESubgroup	<input type="text" value="A2"/> FT N-FLSAOT Prob	Statu	<input type="text" value="Active"/>

Task

Task Type

Date of Task Processing indicator

Reminder

Reminder Date

Lead/follow-up time For specific task type

Comments

79. Update the following fields:

Field Name	Description	Values
Task Type	Select appropriate task type from list	Select task type Example: End of probation
Date of Task	Date on which the task occurs	Enter value in Date of Task. Example: 02/01/2012
Comment	Additional information about an item	Enter value in Comment. Example: End of probation

80. Click the **Enter** button.

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.

A common task type would be End of probation.

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.

81. Click the **Save (Ctrl+S)**  button.

Create I-9 Residence Status (0094)

Personnel No 10000041 Name Matthew Lee McKinney

EEGroup A SPA Employees PersA 4601 Cultural Resources

EESubgroup A2 FT N-FLSAOT Prob Statu Active

Start 05/16/2011 12/31/9999

Personal identification

Residence status CITIZEN

ID type U.S. Passport

Issuing Authority New Orleans

ID number 556148976

Issuing date 01/01/2005

Expiry date 01/01/2015

Employment verification

Work Permit

Issuing Authority

Work permit number

Issuing date

Expiry of WP

82. Update the following fields:

Field Name	Description	Values
Residence Status	Residence status code	Select appropriate status Example: Citizen
ID Type	Documentation	Select appropriate type Example: U.S. Passport
Issuing Authority	City/location of Issuing	Enter value in Issuing Authority. Example: New Orleans
ID number	ID number. For example, Driver's license number.	Enter value in ID number. Example: 556148976

Issuing date	Issuing date of the ID.	Enter value in Issuing date. Example: 01/01/2005
Expiry date	Expiration date.	Enter value in Expiry date. Example: 01/01/2015

83. Click the **Enter**  button.



Select the appropriate Residence status from the drop-down menu. The only required field is Residence status. The remaining fields are optional.

If a residence type other than Citizen is chosen, an additional screen will display containing infotype 0048 information to enter Residence Status details (such as permission number, expiration date, date of issue, etc.). In this example we have chosen Citizen.

When hiring someone who is a Non-Resident Alien, you will choose non-resident alien on IT0094. IT0048 will come up with US01 or US02 as the choices. When you save IT0094 with the non-resident alien choice, then IT0048 with Subtype US01 will come up. The dynamic action brings up IT0048 subtype US01 first, so if you don't want that one, click the YELLOW arrow past that infotype and IT0048 subtype US02 will come up.

84. Click the **Save (Ctrl+S)**  button.

Create Communication (0105)

Personnel No Name

EEGroup SPA Employees PersA Cultural Resources

EESubgroup FT N-FLSAOT Prob Statu

Start to

Communication

Type First telephone number at work

Telephone -

85. Update the following field:

Field Name	Description	Values
Telephone	Employee work telephone number	Enter value in Telephone. Example: 919-733-5656

86. Click the **Enter**  button.

This is the employee's work telephone number.

87. Click the **Save (Ctrl+S)**  button.

Copy Planned Working Time (0007)

Work schedule

Personnel No: Name:

EEGroup: SPA Employees PersA: Natural and Cultural Resources

EESubgroup: FT N-FLSAOT Perm Statu: Active

Start: To: Chg.:

Work schedule rule

Work schedule rule: MTWHF-8,SaS-O WSR Finder

Time Mgmt status: ▼

Working week: ▼

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	0.00

Additional fields

Telework Eligible

88. Update the following field:

Field Name	Description	Values
Weekly working hours	Total hours worked per week	Enter value in Weekly working hours. Example: 40


89. Click the **Enter**  button.

Enter the number of hours this individual will work per week and click Enter to have the system validate the details.

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.

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.

90. Click the **Save (Ctrl+S)**  button.

Create Basic Pay (0008)




Salary amount

Payments and deductions

Personnel No	10000041	Name	Matthew Lee McKinney
EEGroup	A SPA Employees	PersA	4601 Cultural Resources
EESubgroup	A2 FT N-FLSAOT Prob	Statu	Active
Start	05/16/2011	to	12/31/9999

Subtype Basic contract

Salary

Reason	Z0 New Hire	Cap.util.lvl	100.00
PS type	01 Graded	WkHrs/period	173.33 Monthly
PS Area	01 Annual Salaries	Next inc.	
PS group	GR70 Level GR	Ann.salary	52,500.00 USD

Wa...	Wage Type Long Text	O..	Amount	Curr...	I...	A..	Number/Unit	Unit
1000	Regular Salary		4,375.00	USD		<input checked="" type="checkbox"/>		

IV 05/17/2011 - 12/31/9999 4,375.00 USD

91. Update the following field:

Field Name	Description	Values
Reason	Reason for the action, such as New Hire	Enter value in Reason. Example: Z0

92. 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 for the action (in the case of a New Hire there is only 1 reason), and the person's Amount if hourly. Click Enter and the system will validate the salary and provide the hourly rate.

NOTE: If the person is on an hourly position, enter their HOURLY rate, and the system will calculate their salary.

- **Reason** - enter or select from the drop-down menu
- **Next increase** - this field is blank except for the Judicial Branch, which uses it to track the next increase
- **Annual Salary** - populates from the workflow, verify this field for accuracy
- **Amount** - will be blank; if the employee is paid hourly instead of annually, enter the hourly amount in the Amount field
- **Number/Unit** - will be blank
- **Unit** - will be blank

NOTE: Employees can be different from the position. For example, the position may be annual salary and the employee may be hourly.



Period	Amount
Annual salary	52,500.00000
Salary/monthly	4,375.00000
Semi-monthly salary	2,187.50000
Salary/every 14 days	2,019.23077
Wage/weekly	1,009.61538
Salary/hourly	25.24038

NOTE: DOT records will be recorded with five decimal places after the period, instead of only two for payroll processing purposes (except for Temporaries). Also, DOT Salary/hourly amount may not be correct depending on the yearly working hours.

93. Click the **Save (Ctrl+S)**  button.

Create General Benefits Information (0171)

Personnel No Name

EGroup SPA Employees PersA Cultural Resources

ESubgroup FT N-FLSAOT Prob Statu

Start to

Possible subsequent activi...

Ger Enrolled on IC

Ber Terminated on fits Elg

1st Automatic Plans Employees

2nc Default Plans

All plans

Add. functions

Plan overview

Enrollment Form

Particip. Monitor

94. Click the **Enter**  button.


The **Possible subsequent activities** pop-up window displays only for enrollment in retirement. The effective date should default to the same date as the Action. If an employee is not entitled to retirement enrollment, such as Temporaries, this window will not display.





Enrollment

Direct selection Selection set

Personnel no.



ID number



Pers.No.	Name
10000041	Matthew Lee McKinney

Enroll

Name on  

Offer selection

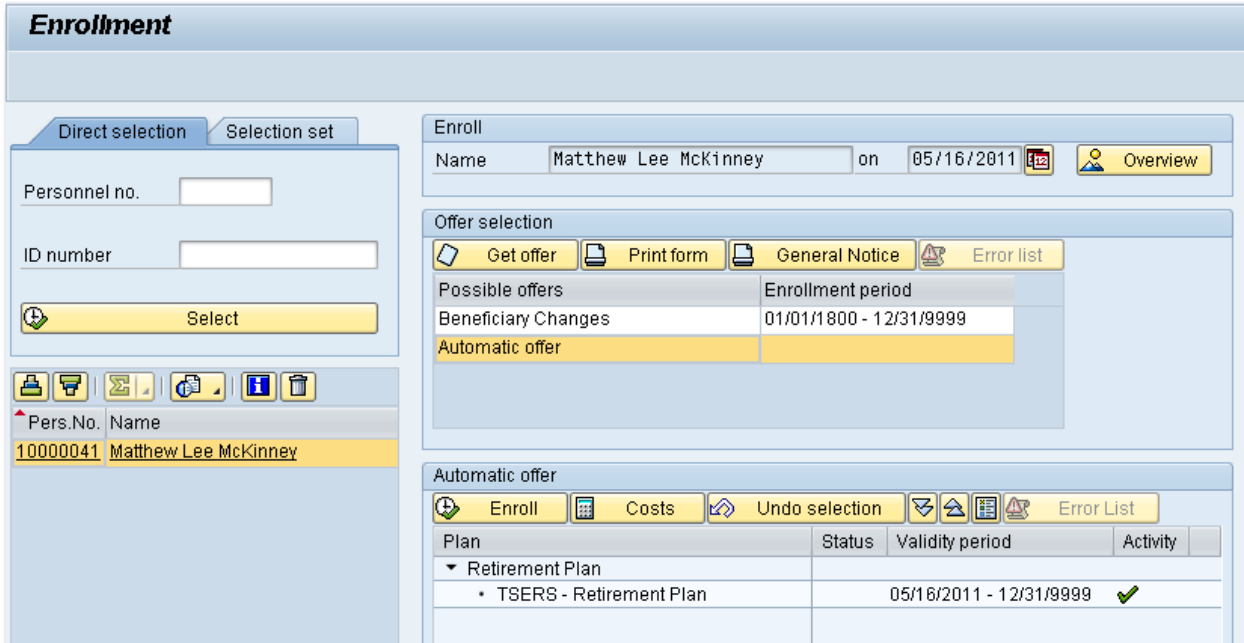
Possible offers	Enrollment period
Beneficiary Changes	01/01/1800 - 12/31/9999
Automatic offer	

Offer

95. Click the **Possible offers** column.

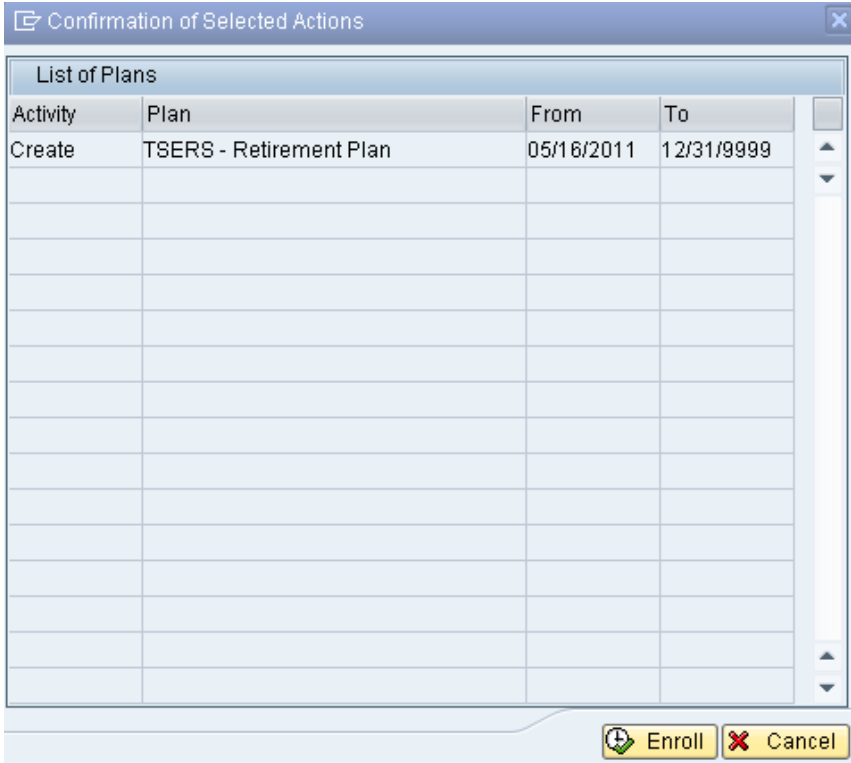
Highlight the **Automatic Offer** row and click **Get Offer**.

96. Click the **Get offer**  button.



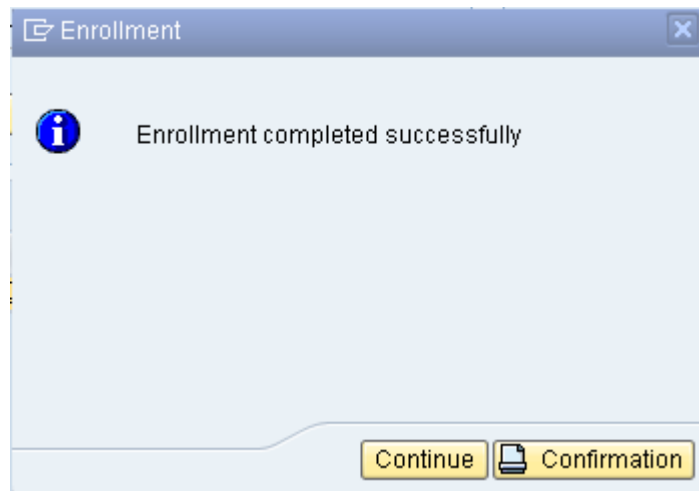
97. Click the **Enroll**  **Enroll** button.

If the employee is Law Enforcement, they should be eligible for the Supplemental LEORS 401(K) plan also. This option will be listed here also. In that case, you would enroll the employee in LESORS and the LEO’s 401K (Law Enforcement Officers Supplemental 401(K) plan.

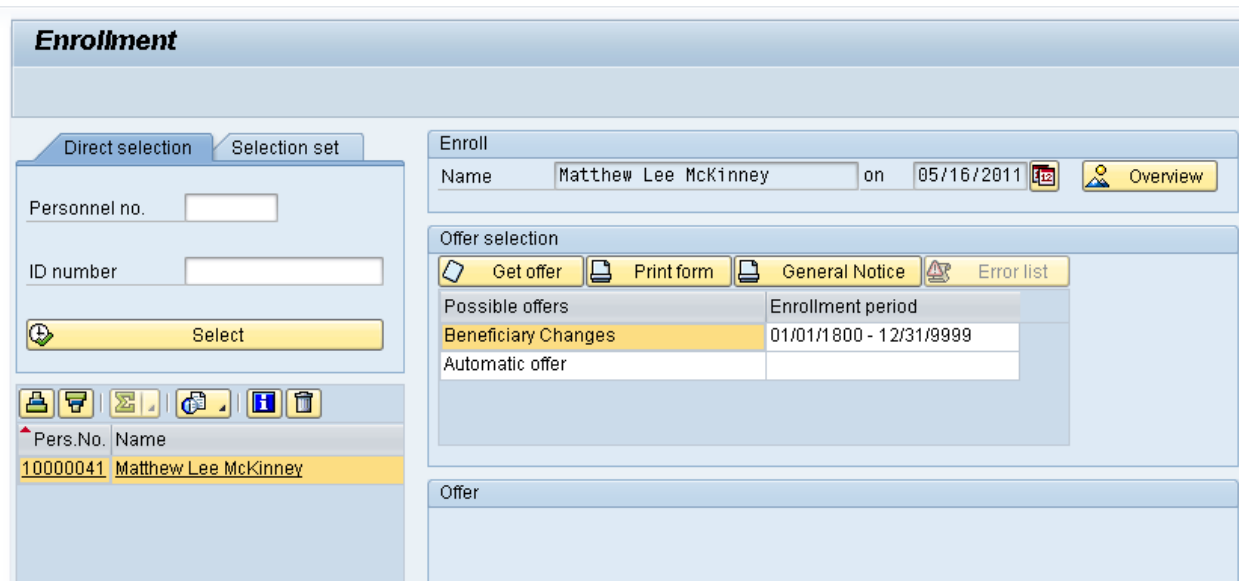


98. Click the **Enroll**  **Enroll** button.

Click Enroll to enroll the individual in the plan(s) listed.



99. Click the **Continue**  button.



100. Click the **Back (F3)**  button.

101. Click the **Cancel (F12)**  button.

If there are subsequent activities to be processed, they can be accessed via this window. If there are no subsequent activities, or if all subsequent activities have been processed, close this window to continue to the next infotype screen.

102. Click the **Bank Key** matchcode.

If you know the bank routing number, enter it here. In this example we provide details on searching for a bank key.

The screenshot shows a 'Find bank' form with the following fields and values:

- Bank Country: US
- Bank Key: (empty)
- Bank name: *fidelity* (highlighted in yellow)
- City: (empty)
- Bank number: (empty)
- SWIFT code: (empty)
- Bank Branch: (empty)
- House no/street: (empty)
- Restrict Number: 500

At the bottom of the form, there are two buttons: a green checkmark icon and a red 'X' icon.

103. Update the following field:

Field Name	Description	Values
Bank name	The name of the financial institution where your account is located	Enter value in Bank name. Example: *fidelity*

Enter a part of the name of the bank and use the wildcard [*] to assist with the search.

104. Click the **Enter**  button.

Ctry	Bank Key	Name of bank	House number and street	City	Bank Branch	SWIFT code	Bank number
US	031303129	FIDELITY DEP DISCOUNT BK	338 NORTH WASHINGTON AVE	SCRANTON			031303129
US	051409197	THE FIDELITY BANK	100 S MAIN ST	FUQUAY-VARINA			051409197
US	052100547	THE FIDELITY BANK	742 OLD HAMMONDS FERRY RD	LINTHICUM			052100547
US	053102340	THE FIDELITY BANK	100 SOUTH MAIN STREET	FUQUAY-VARINA			053102340
US	053102696	THE FIDELITY BANK	100 SOUTH MAIN STREET	FUQUAY-VARINA			053102696
US	053103585	THE FIDELITY BANK	100 SOUTH MAIN STREET	FUQUAY-VARINA			053103585
US	053103598	THE FIDELITY BANK	100 SOUTH MAIN STREET	FUQUAY-VARINA			053103598
US	053104283	THE FIDELITY BANK	100 SOUTH MAIN STREET	FUQUAY-VARINA			053104283
US	053107251	THE FIDELITY BANK	100 SOUTH MAIN STREET	FUQUAY-VARINA			053107251
US	053110002	THE FIDELITY BANK	100 SOUTH MAIN STREET	FUQUAY-VARINA			053110002
US	053110235	THE FIDELITY BANK	100 SOUTH MAIN STREET	FAQUAY-VARINA			053110235
US	053110581	THE FIDELITY BANK	100 SOUTH MAIN STREET	FUQUAY-VARINA			053110581
US	053110963	THE FIDELITY BANK	100 SOUTH MAIN STREET	FUQUAY-VARINA			053110963
US	053110976	THE FIDELITY BANK	100 SOUTH MAIN STREET	FAQUAY-VARINA			053110976
US	055003405	FIDELITY & TRUST BANK	4831 CORDELL AVENUE	BETHESDA			055003405
US	061102400	FIDELITY BANK	P.O. BOX 105075	ATLANTA			061102400
US	063113934	FIDELITY BK OF FLORIDA, NA	P O BOX 540160	MERRITT ISLAND			063113934
US	067003671	FIDELITY FEDERAL BANK & TRUST	205 DATURA ST	WEST PALM BEACH			067003671
US	072412655	FIDELITY BANK	2681 INDUSTRIAL ROW	TROY			072412655
US	072412781	FIDELITY BANK	1040 E. MAPLE RD	BIRMINGHAM			072412781
US	073914398	FIDELITY BANK AND TRUST	PO BOX 277	DYERSVILLE			073914398
US	073920900	FIDELITY BANK	PO BOX 397	HUXLEY			073920900
US	073922500	FIDELITY BANK AND TRUST	P O BOX 277	DYERSVILLE			073922500
US	084001148	FIDELITY NATIONAL BANK	P.O. BOX 2288	WEST MEMPHIS			084001148
US	091014924	FIDELITY BANK EDINA	7600 PARKLAWN AVE	EDINA			091014924
US	091403548	FIRST FIDELITY BANK	123 MAIN	MURDO			091403548
US	091403865	FIRST FIDELITY BANK	PO BOX 376	BURKE			091403865
US	091407764	FIRST FIDELITY BK BURKE-PLATTE OFF	PO BOX 450	PLATTE			091407764
US	091408200	FIRST FIDELITY BK GREGORY	P O BOX 271	GREGORY			091408200
US	091408873	BONESTEEL OFF-1ST FIDELITY BK BURKE	PO BOX 50	BONESTEEL			091408873
US	091408996	FIRST FIDELITY BANK	PO BOX 407	COLOME			091408996
US	091409500	WINNER BR-FIRST FIDELITY, BURKE	PO BOX 111	WINNER			091409500
US	091512251	FIDELITY NATIONAL BANK	215 S 8TH	MEDFORD			091512251

105. Click 063113934.

106. Click the **Enter**  button.

Locate the correct bank routing number and double-click or highlight the number and click Copy. If your search did not result in the bank you were looking for, click the gray bar with the gray triangle at the top of the search window to refine or adjust your search criteria.

Create Bank Details (0009)

Personnel No Name

EGroup SPA Employees PersA Cultural Resources

ESubgroup FT N-FLSAOT Prob Statu

Start to

Bank details

Bank details type

Payee

Postal Code/City

Bank Country

Bank Key FIDELITY BK OF FLORIDA, NA

Bank Account Bank control key

Payment method Payroll Direct Deposit

Purpose

Payment currency United States Dollar

107. Update the following fields:

Field Name	Description	Values
Bank Account	The Bank account number from the employee’s voided check	Enter value in Bank Account. Example: 5512468
Bank control key	Key to control and identify bank number	Enter value in Bank control key. Example: 01

108. Click the **Enter**  button.

Entering the **Bank control key** field is critical. [01] is for checking, and [02] is for savings. If Payroll Direct Deposit (ACH) is selected, this field must be populated with the bank key information for the new employee.

The **Payment method** field will default to [P] for direct deposit, but you can change it to [C] for a printed check, if the employee is not set up for direct deposit yet. The State recommends direct deposit.

If Payroll Direct Deposit (ACH) is selected, the **Bank Account Number** field must be populated with the bank account number of the new employee.

The **Purpose** field can be left blank. The employee will manage through ESS (Employee Self-Service) or by sending a form to BEST Shared Services for changes.

NOTE: The Bank Control Key and choice of Direct Deposit or Check is **MANDATORY**, and payroll will not process for this individual without these fields completed. If you don't have the bank details, please create with 'C' and the employee can enter direct deposit via ESS or HR when the information is received. Employees must use direct deposit unless an exception is granted by the State Controller.

Create Bank Details (0009)

Personnel No	10000041	Name	Matthew Lee McKinney
EEGroup	A	SPA Employees	PersA 4601 Cultural Resources
EESubgroup	A2	FT N-FLSAOT Prob	Statu Active
Start	05/16/2011	to	12/31/9999

Bank details

Bank details type	Main bank		
Payee	Matthew Lee McKinney		
Postal Code/City	27611	Raleigh	
Bank Country	USA		
Bank Key			
Bank Account		Bank control key	<input type="checkbox"/>
Payment method	C Payroll Check		
Purpose			
Payment currency	USD	United States Dollar	

109. Click the **Save (Ctrl+S)** button.

Create Additional Personal Data (0077)

Personnel No Name

EEGroup SPA Employees PersA Health Human Services

EESubgroup FT S-FLSAOT Prob Statu

Start To

Ethnic origin

Military status

Veteran Status

Discharge Date

Protected Veteran

Special Disabled Veteran

Vietnam Era Veteran

Other Protected Veteran

Recently Separated Veteran

Armed Forces Service Medal Veteran

Disabled Veteran

Not a Protected Veteran

Non Veteran

Disability

Status

Additional Veteran Status


Separated

Retired

State Statute


Spouse of disable veteran

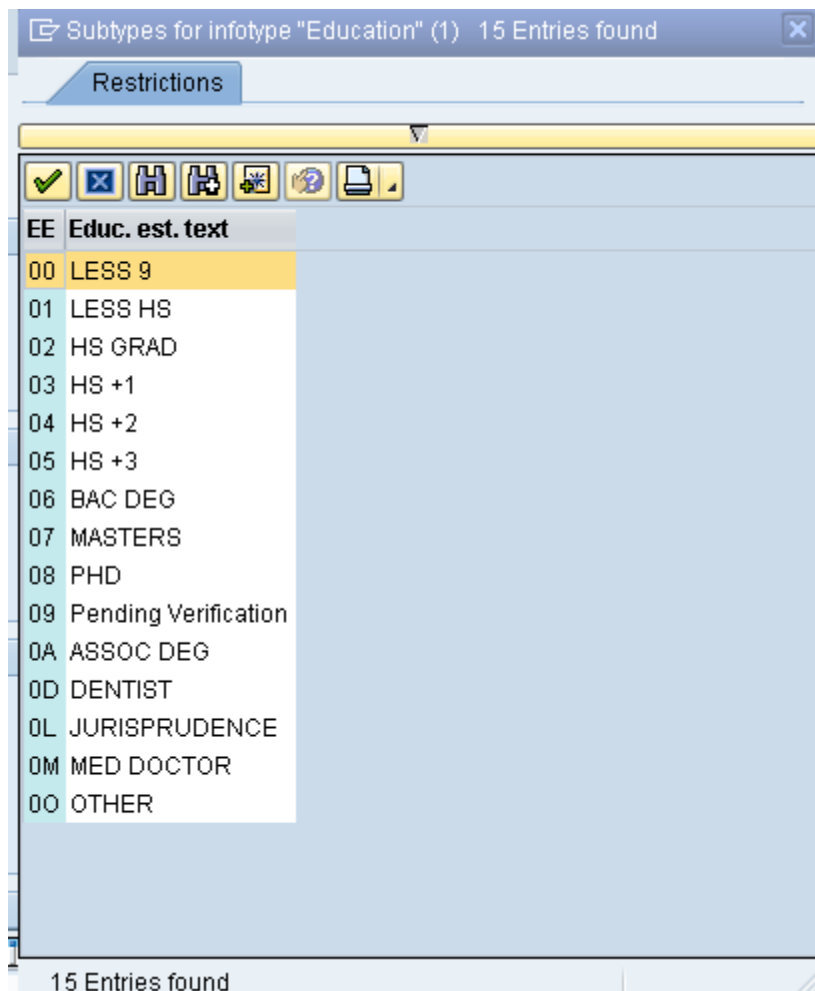
Spouse or surviving dependent of deceased veteran

110. Complete the **Ethnic origin** drop-down list.
111. Complete the **Military status** drop-down list as needed.
112. Click the **Protected Veteran**, **Not a Protected Veteran**, or **Non-veteran** radio button.
113. Complete the **Disability Status** drop-down list.
114. Complete the **Additional Veteran Status** as needed.
115. Complete the **State Statute** as needed.
116. Click the **Enter**  button.

Enter information as appropriate and available on this screen. If the Veteran Status choice is left blank, the system will notify you that it will be recorded as "undisclosed."

The Military status field should be left blank, unless the employee has a designated military status. If you choose Reserve, infotype 2013 will display, where you will enter 120 hours of military leave.

117. Click the **Save (Ctrl+S)**  button.



118. Click **02** .

119. Click the **Enter**  button.

Select the education level stated on the employment application and the highest level used to qualify for the position.

Create Education (0022)

Personnel No Name

EGroup SPA Employees PersA Cultural Resources

EESubgroup FT N-FLSAOT Prob Statu

Start to

Educational est. HS GRAD

Institute/location

Verified HS GRAD

120. Update the following fields:

Field Name	Description	Values
Start	Start date of the specified date range	Enter value Example: 08/01/2003
To	Ending date of the specified date range	Enter value in to. Example: 05/12/2007
Institute/location	Name or location of educational institution that the employee attended	Enter value in Institute/location. Example: Enloe High School
Verified	The type of leave certificate (high school diploma, university degree) the employee or applicant has acquired at the given institute	Enter value in Verified. Example: 02


121. Click the **Enter**  button.

Enter the date of the education, the institution (high school, college, university, etc.), and whether it has been verified or not. The Start field is the date the education was started, the “to” field is the end date of the educational degree.




In the **Verified** field, enter 09 until the education has been verified.

Once the degree has been verified you will use a [PA30] transaction to copy this record and change the field to **Verified [02]**.

(Example shows after verified.)

122. Click the **Save (Ctrl+S)**  button.

Create Monitoring of Tasks (0019)

Personnel No	10000041	Name	Matthew Lee McKinney
EGroup	A SPA Employees	PersA	4601 Cultural Resources
EESubgroup	A2 FT N-FLSAOT Prob	Statu	Active

Task

Task Type Credential Verificat

Date of Task Processing indicator New task

Reminder

Reminder Date

Lead/follow-up time For specific task type

Comments

123. Update the following fields:


Field Name	Description	Values
Date of Task	Date on which the task occurs	Enter value in Date of Task. Example: 8/16/2011
Comments	Additional comments for future reference.	Enter value in Comments. Example: Verify educational history

124. Click the **Enter**  button.

The best practice is to calculate 90 days to comply with the policy.

If you are not creating a monitoring task, click the Next Screen button to move to the next infotype.

The reminder date will default to 30 days prior to the end date of the task.

125. Click the **Save (Ctrl+S)**  button.

Subtypes for infotype "Certification and Licensing" (1) 70 Entries found

Restrictions

Catego...	Name	Start Date	End Date
0001	Acupuncture - Acupuncture Lic Bd	01/01/1900	12/31/9999
0002	Rel Estate Appraiser - Appraisal Board	01/01/1900	12/31/9999
0003	Auctioneer - Auctioneer Lic Bd	01/01/1900	12/31/9999
0004	Geologists - Geologists Lic Bd	01/01/1900	12/31/9999
0005	Soil Scientist - Soil Scientists Lic	01/01/1900	12/31/9999
0006	Architecture License - Architecture Boar	01/01/1900	12/31/9999
0007	Dietetic Reg - Dietetics/Nutrition	01/01/1900	12/31/9999
0008	Professional Engineer - Eng / Survey Ex B	01/01/1900	12/31/9999
0009	Pathologists - Pathologists Bd	01/01/1900	12/31/9999
0010	Law Enforcement Off - Law Examiners Bd	01/01/1900	12/31/9999
0011	Licensed Counselor - Prof Counselors Bd	01/01/1900	12/31/9999
0012	Registered Nurse - Nursing Board	01/01/1900	12/31/9999
0013	Occupation Therapist - Occupational Ther	01/01/1900	12/31/9999
0014	Pharmacy License - Pharmacy Board	01/01/1900	12/31/9999
0015	Physical Therapist - Physical Therapy B	01/01/1900	12/31/9999
0016	Medical Doctor - Medical Board	01/01/1900	12/31/9999
0017	Psychological Asc - Psychology Board	01/01/1900	12/31/9999
0018	Rel Estate Appraiser - Real Estate Comm	01/01/1900	12/31/9999
0019	Clinical Addict Spec - Social Work Cert	01/01/1900	12/31/9999

126. Click **0031**.

127. Click the **Enter**  button.

Choose any additional certifications and/or licenses to enter on the record of this individual. In this example we will add an additional teaching certification.

Create Certification and Licensing (0795)

Personnel No Name
 EEGroup SPA Employees PersA Cultural Resources
 EESubgroup FT N-FLSAOT Prob Statu
 Start
 Category NC Driver License - NC DMV

Certification and Licensing

 Type NC Driver License Issuing Authority
 Identification Doc. Status
 Valid from Valid to

Specializations

Classific...	Code	Area	Level	Valid from	Valid to	Status
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					

Renewal Code


128. Update the following fields:

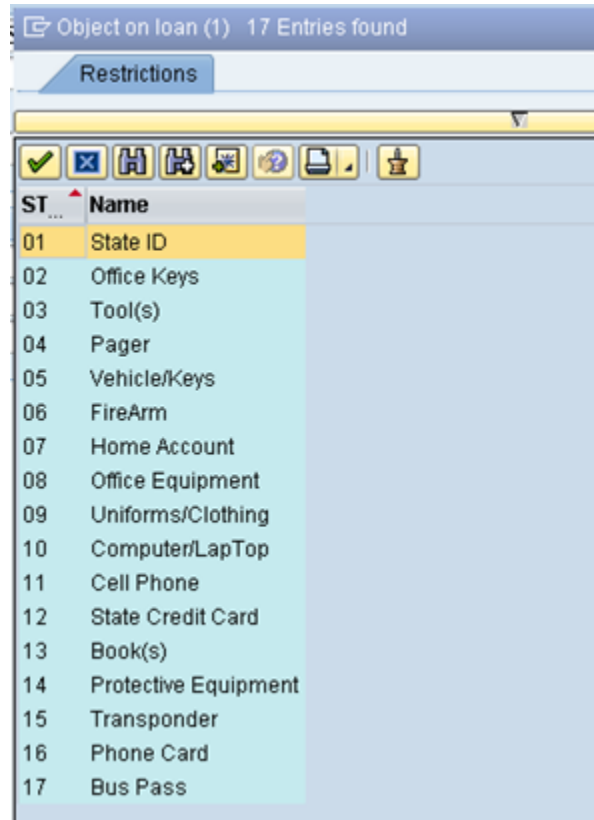
Field Name	Description	Values
Valid from	Beginning date of the specified date range. Also referred to as the effective date range, identifies the lifespan assigned to an object or an infotype record, or the period of time that these items "exist."	Enter value in Valid from. Example: 02/16/2007
Valid to	Contains a date that identifies the end of the validity period which is the ending date of the organizational assignment; if the assignment is ongoing, the "end of time" 12/31/9999 is entered	Enter value in Valid to. Example: 02/16/2012

129. Click the **Enter**  button.

Enter the valid dates of the certification or license. Remember to change the end date of this record at the top of the page - if the license is only valid through the end of 2012, for example, the system will not let you create the record valid through 12/31/9999 (which is the default) - you must change the end date of the record to match the end date of the validity of the certification or license.

NOTE: Enter only the certificates and/or licenses required for the position.

130. Click the **Save (Ctrl+S)**  button.



Create Objects on Loan (0040)

Personnel No Name

EEGroup SPA Employees PersA Cultural Resources

EESubgroup FT N-FLSAOT Prob Statu

Start to

Objects on Loan

Object on loan State ID

Number/unit Pieces

Loan object no.

Comments

Line 1

Line 2

Line 3

131. Update the following fields:


Field Name	Description	Values
Object on loan	Enter the key of the object the employee has borrowed from the company.	Enter value in Object on loan. Example: 01
Number/unit	Enter number/unit of items out on a loan.	Enter value in Number/unit. Example: 1
Number/unit	Enter number/unit of items out on a loan.	Enter value in Number/unit. Example: Pieces
Loan object no.	Identification or reference number of the object (if available)	Enter value in Loan object no. Example: 443675

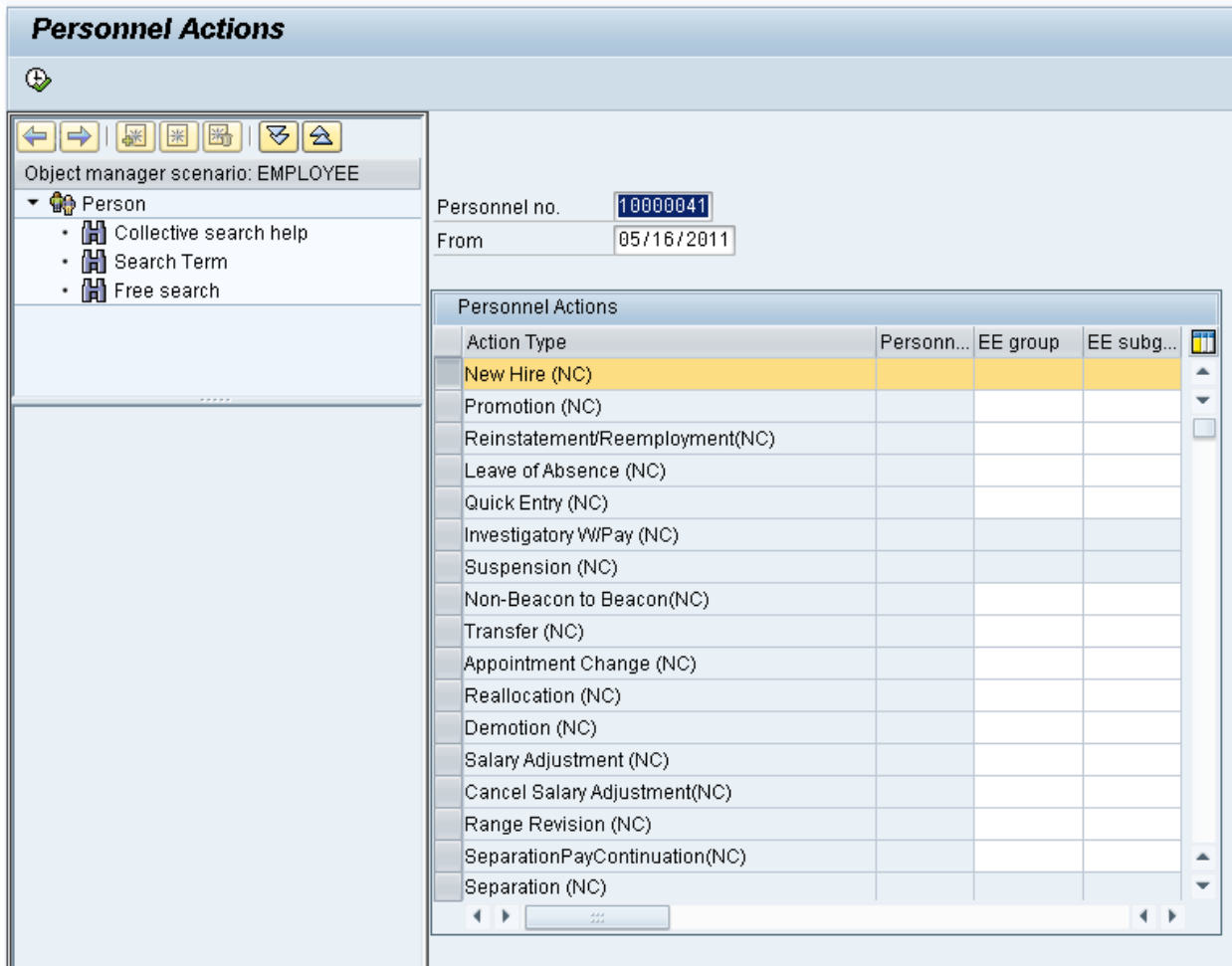
132. Click the **Enter**  button.

Enter the object on loan that will be issued to the individual.

Comments may be entered on lines 1, 2, and 3 if appropriate for your business policy.

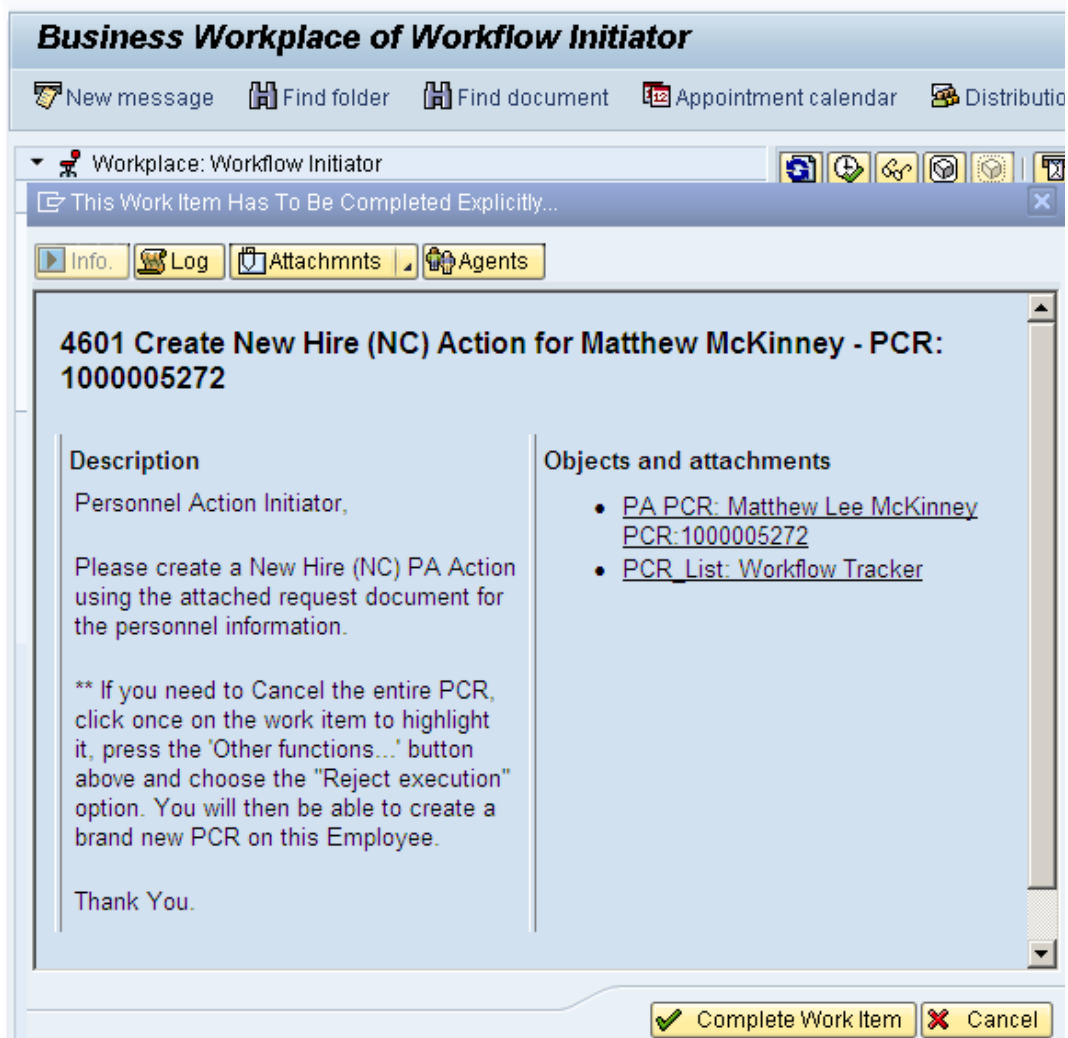
NOTE: If the employee receives more than one item on loan, you will need to process a PA30 transaction in order to add the additional line items to infotype 0040.

133. Click the **Save (Ctrl+S)**  button.



134. Click the **Back (F3)**  button.

When you reach this front screen again, the system has processed all appropriate infotypes for the action you are creating. Now the action has been successfully processed, and you can complete the workflow.



135. 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 can complete the PCR in workflow.

Decision Step in Workflow

Workflow Create

4601 New Hire (NC) for Employee Matthew Lee McKinney Status?

Choose one of the following alternatives

[Continue PA Action](#)

[PA Action Completed](#)

[Cancel and keep work item in inbox](#)

Description

Personnel Action Initiator.

Please choose one of the following choices for Employee Matthew Lee McKinney ~ Personnel #10000041:

Continue PA Action - taken to transaction PA40 to complete the New Hire (NC) Employee's data.

PA Action Completed - New Hire (NC) data completed.

Cancel and Keep Work item in Inbox - the work item will remain in your inbox for later processing.

Thank You.

Objects and attachments

- [PA PCR: Matthew Lee McKinney PCR 1000005272](#)
- [PCR_List: Workflow Tracker](#)

136. Click the **PA Action Completed** hyperlink.

To view the completed PCR in workflow anytime in the future, and verify that it has been marked as completed. Go to your Outbox.

Business Workplace of Workflow Initiator

New message Find folder Find document Appointment calendar Distribution lists

Workplace: Workflow Initiator

- Inbox
 - Unread Documents 0
 - Documents 0
 - Workflow 1**
 - Overdue entries 0
 - Deadline Messages 0
 - Incorrect entries 0
- Outbox
- Resubmission
- Private folders
- Shared folders
- Folders subscribed to
- Trash
- Shared trash

Workflow 1

Ex...	Title	Status	Creation Da...	Creation ...	P Att...	Co...W...
4601	Create New Hire (NC) Action for Matthew McKinney - PCR: 1		05/17/2011	16:09:44	5	

Tips & tricks: Display Other Columns...

4601 Create New Hire (NC) Action for Matthew McKinney - PCR: 1000005272

Description

Personnel Action Initiator.

Please create a New Hire (NC) PA Action using the attached request document for the personnel information.

Objects and attachments

- [PA PCR: PCR 1000005272](#)
- [PCR_List: Workflow Tracker](#)

137. Select **Outbox >> Started workflows**.

Since you initiated this workflow item, the PCR will be in your **Started workflows** folder.

Business Workplace of Workflow Initiator

New message Find folder Find document Appointment calendar Distribution lists

Workplace: Workflow Initiator

Inbox

- Unread Documents 0
- Documents 0
- Workflow 0
 - Grouped according to content
 - Grouped according to content type
 - Grouped according to sort key
 - Grouped according to task
- Overdue entries 0
- Deadline Messages 0
- Incorrect entries 0

Outbox

- Documents
- Started workflows
- Work items executed by me
- Forwarded work items

Resubmission Private folders Shared folders Folders subscribed to Trash

Started workflows (Since 05/03/2011)

W...	Work item ty...	Title	Status	Creation Da...	Creation ...	P Att...
	(Sub)workflo	workflow 4601 PA Action Approval WF for Matthew McKinney - PCR: 10000		06/02/2011	07:39:35	5


- Select the PCR **workflow 4601 PA Action Approval WF for Matthew McKinney - PCR: 10000** row.
- Click the **PCR List Workflow Tracker** hyperlink.

Workflow actions

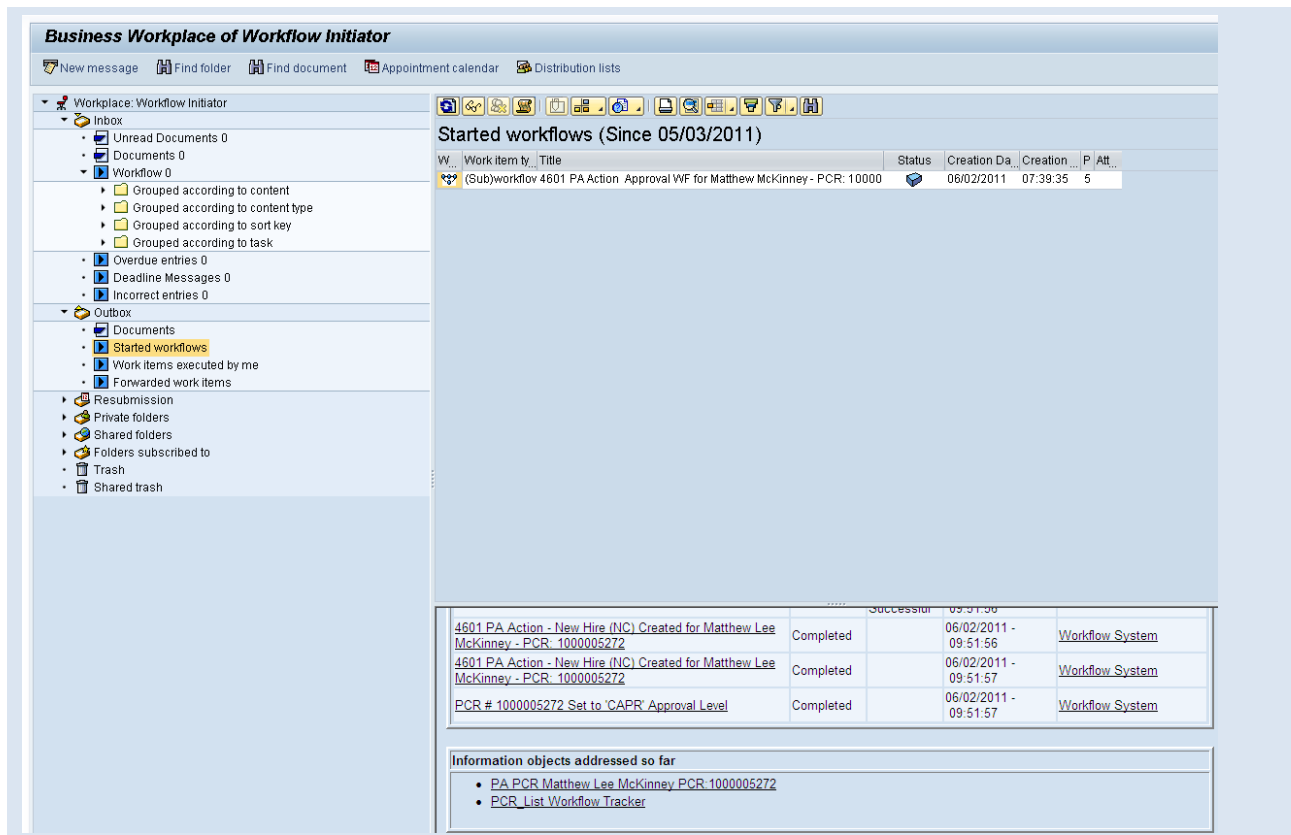
Heading

Request ID	1000005272	Status	M	Completed	Approval Level	CAPR	Complete - Approved
Action Type	Z0	New Hire (NC)			Reason	New Hire	
Agency	4601	Cultural Resources			Org. Unit	20010125	CR CDS CABSEC Bds & Commiss
Creator	80001133	Lisa Richardson11			Position	60083990	Curator Of Furnishings & Decorative Arts
Employee	0						

S...	Role	Mand	A	Ptype	Atype	Agent ID	Name / Description	Act	Desc	C...	Actual	Name	ACT DATE	ACT TIME	CR DATE	CR TIME	PCRNO
200	FA1	X	A	P		80001073	Earl Gutierrez11	A	Approved		80001073	Earl Gutierrez11	06/02/2011	08:32:09	06/02/2011	08:16:46	1000005272
200	FA1	X	A	P		80001074	Earl Gutierrez12	0	N/A				06/02/2011	08:32:09	06/02/2011	08:16:46	1000005272
200	FA1	X	A	P		80001075	Earl Gutierrez13	0	N/A				06/02/2011	08:32:09	06/02/2011	08:16:46	1000005272
200	FA1	X	A	P		80001076	Earl Gutierrez14	0	N/A				06/02/2011	08:32:09	06/02/2011	08:16:46	1000005272
200	FA1	X	A	P		80001077	Earl Gutierrez15	0	N/A				06/02/2011	08:32:09	06/02/2011	08:16:46	1000005272
200	FA1	X	A	P		80001078	Earl Gutierrez16	0	N/A				06/02/2011	08:32:09	06/02/2011	08:16:46	1000005272
200	FA1	X	A	P		80001079	Earl Gutierrez17	0	N/A				06/02/2011	08:32:09	06/02/2011	08:16:46	1000005272
200	FA1	X	A	P		80001080	Earl Gutierrez18	0	N/A				06/02/2011	08:32:09	06/02/2011	08:16:46	1000005272
200	FA1	X	A	P		80001081	Earl Gutierrez19	0	N/A				06/02/2011	08:32:09	06/02/2011	08:16:46	1000005272
200	FA1	X	A	P		80001082	Earl Gutierrez20	0	N/A				06/02/2011	08:32:09	06/02/2011	08:16:46	1000005272
2			P	P		80001133	Lisa Richardson11	P	Processed		80001133	Lisa Richardson11	06/02/2011	09:51:56	06/02/2011	08:32:10	1000005272

- Select the last row **2** **P** **P** **80001133** **Lisa Richardson11** **P** **Processed**.
- Click the **Back (F3)**  button.

Notice the PCR now has the last step documented as Processed by you. The PCR is complete.



142. Click the **Back (F3)**  button.

143. The New Hire Action is complete, but we recommend reviewing via PA20 all infotypes that have been processed.

144. You may need to create additional infotypes if employee is eligible via PA30:

- Employee has prior Creditable State service – Create IT0552 Time Specification/Employ Period
- Employee was paid pro-rated longevity – Create IT2012 Time Transfer Specifications

Additional Resources

Training HELP website: https://www.osc.nc.gov/state-agency-resources/training/training_help_documents

Change Record

Change Date: 2/5/21 (B. Johnson)
 Changes: Infotype 0007

Change Date: 3/31/22 (Cindy MacDonald)
 Changes: Removed Date Monitoring Report (S_PHO_48000450), replaced it with BOBJ Report – B0099 – Employee Deadline Dates