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

Trigger: There is a need to process a Transfer action when moving an employee from one graded position to another or from one banded position to another within the present agency or between Integrated HR-Payroll System agencies without a break in service.

Business Process Procedure Overview:

A transfer is the movement of an employee from one position to another within the present agency or between agencies without a break in service. Normally a transfer between agencies results in an employee reporting to work in the receiving agency the first workday after the last day worked at the releasing agency.

The Releasing Agency and the Receiving Agency should communicate prior to any entry into the Integrated HR-Payroll System. This communication process is critical to ensure that the employee does not lose pay or benefits during the transfer.

When an employee indicates he or she is leaving the agency, the agency should inquire if the employee is going to another agency. **If the employee is going to another agency, the Releasing Agency does not separate the employee.** The Releasing Agency does not enter any actions in the Integrated HR-Payroll System because as soon as the Receiving Agency enters the Transfer action, the employee is transferred out of the Releasing Agency automatically. The Releasing Agency only:

- ensures time has been entered, released and approved before time evaluation runs,
- delimit Agency specific Benefits,
- delimits objects on loan (using PA30) that the employee returned (IT0040 – Objects on Loan),
- verifies accuracy of leave accruals, and
- discusses overtime comp with the employee (only paid if S-FLSA-OT; otherwise lost if not used within the OT comp aging period).

The Receiving Agency does not create a New Hire action for the employee. After communicating with the Releasing Agency, the Receiving Agency creates a Transfer action for the appropriate reason. The Receiving Agency should verify with the Releasing Agency that the following has occurred prior to completing the action:

- time has been entered, released and approved prior to time evaluation,
- objects on loan have been delimited for returned items,
- the start date is accurate,
- rollover accrual amounts have been verified,
- all applicable information has been entered the Action infotype notes,
- overtime comp has been discussed with the employee, and
- Agency specific Benefits have been delimited

 The HR Administrator gathers the necessary approved employee data (from documents) and initiates the request for approval for the transfer using transaction code ZPAA076. Once approval has been obtained using the workflow system, the initiator processes the Transfer action. If the transfer occurs within the same

agency and the initiator has security access to the "from" and "to" organizational units, the action can be processed directly from the approved PCR in workflow.

TRANSFER NOTE: Effective immediately, agencies are no longer required to submit the **BEST Shared Services PA Employee Movement within System Form** when a Transfer – Temp to Perm or Perm to Temp action is to be processed by the PA/OM Team at BEST Shared Services.

Things BEST PA/OM will need from the agency to process the action via a ticket:

- Approved PCR number,

- Planned Working Time – Work schedule, Negative or Positive time recording, Working Period [Sat (mdnt) – Fri, etc.] and Weekly working hours, and

- EE's work location phone number (IT0105-Communication).

Once the action has been processed at BEST, your BEST HR Specialist will notify you by phone or email that the action has been processed. You will then need to set your PCR to complete and review/maintain the EE's infotypes/records in the system.

Reasons:

- 01 - Agency to Agency Lateral
  o movement to a position assigned the same salary grade or
  o movement between positions from one career-banded class to another with the same journey market rate or
  o movement to a position within the same banded class within the same competency level
- 02 - Agency to Agency Re-assignment
  o movement to a position assigned a lower salary grade or
  o movement between positions from one career-banded class to another with a lower journey market rate or
  o movement to a position within the same banded class with a lower competency level
- 05 - Agency to Agency Promotion
  o movement to a position assigned a higher salary grade or
  o movement between positions from one career-banded class to another with a higher journey market rate or
  o movement to a position within the same banded class with a higher competency level
- 06 - Within Agency Lateral
  o a change in status resulting from assignment to a position assigned a same salary grade or
  o movement between positions from one career-banded class to another with the same journey market rate
- 07 - Within Agency Re-assignment
  o a change in status resulting from assignment to a position assigned a lower salary grade or
  o movement between positions from one career-banded class to another with a lower journey market rate
- 08 - Grade Band Transfer
  o employee movement between banded and graded classes
  o banded to graded
  o graded to banded

- 09 – Class/Pay Plan Change – Employee movement between two SPA positions assigned to different class/pay systems:
  - Graded
  - Career banded
  - Pilot banded
  - Skill Based Pay
  - Flat Rate
- 10 – EPA-SAP – Employee movement between an EPA position and an SPA position or vice versa (Change in position number)
- 12 – Temp to Perm – Employee movement from a temporary position to a permanent position (Change in position number) *Contact BEST Shared Services for processing.*
- 13 – Perm to Temp – Employee movement from a permanent position to a temporary position (Change in position number) *Contact BEST Shared Services for processing.*
- 60 – Within Agency Reorganization – Position and employee are being transferred to a new supervisor, work unit, county, and/or cost center within the current agency due to reorganization. Position number does not change.
- 61 – Agency to Agency Reorganization - Position and employee are being transferred to a new supervisor, work unit, county, and/or cost center outside of the current agency due to reorganization. Position number does not change.

Tips and Tricks:

If working with a Transfer workflow, ensure the position to which the person is being transferred is vacant.

We recommend, on the Employee Action Request, first enter the EE Position number and then click Enter to request validation by the Integrated HR-Payroll System and the pre-population of many of the fields. If other fields are entered prior to the position number, when the system validates the position number, the fields may not populate properly.

Access Transaction:

Via Menu Path: Your menu path may contain this custom transaction code depending on your security roles.

Via Transaction Code: ZPAA076

Procedure
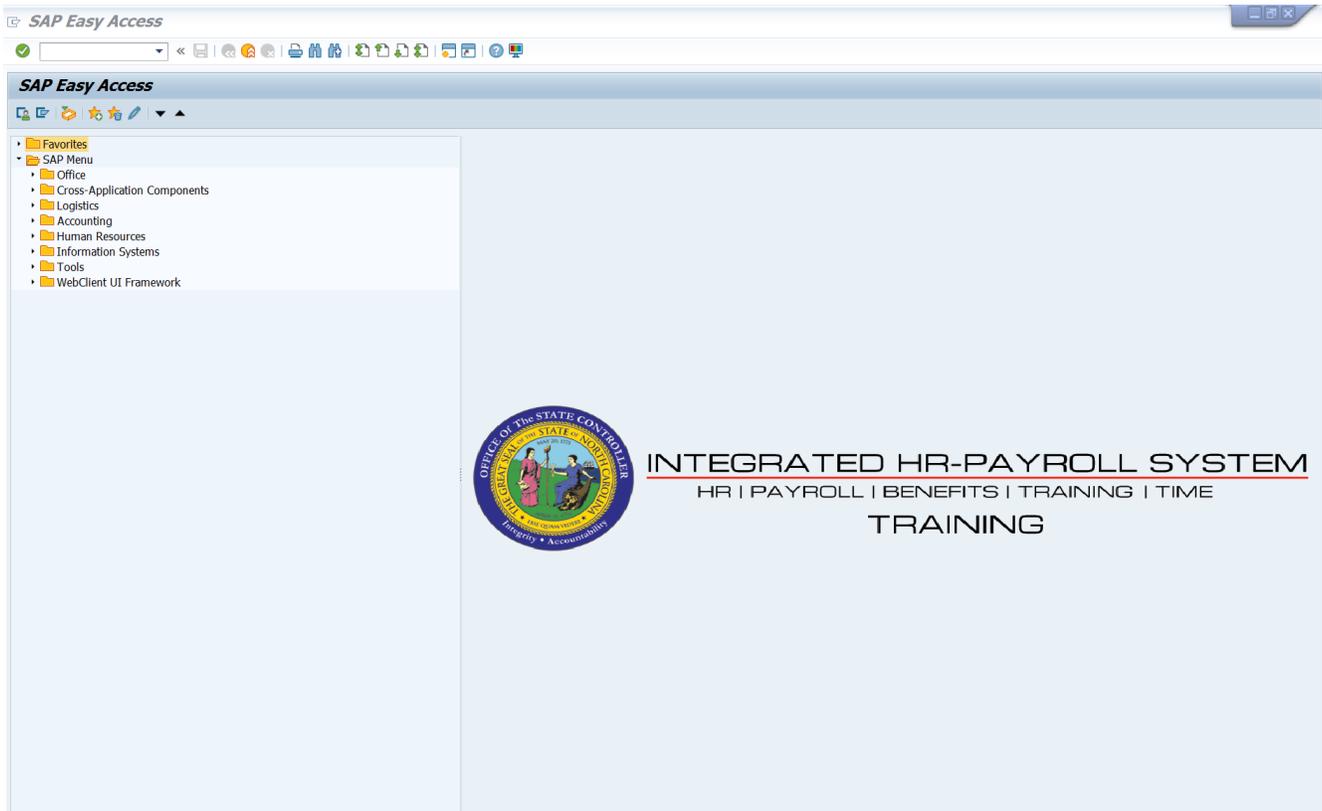
1. Update the following field:

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 icon] button.

![information icon] **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.

3. Update the following fields:

Field Name	Description	Values
Personnel No.	Unique employee identifier	Enter value in Personnel No. **Example**: 80000035
Effective on	The date on which the action will be effective	Enter value in Effective on. **Example**: 05/15/2008
Action Type	An action is a grouping of activities used to perform a specific task. The action will prompt the user for the Infotypes required to complete the task.	Enter value in Action Type. **Example**: Z8
Field Name	**Description**	**Values**
Reason	Reason for the action, such as Agency to Agency - Lateral	Enter value in Reason. **Example**: 01

4. Click the **Enter** ✅ button.

Enter the Personnel Number of the individual to be transferred. 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 match code search button to the right of the field for search options.

NOTE: If the employee is not available in your security access, use the BI report Cross Agency Verification to obtain the Personnel Number.

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

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

Click Enter to verify the information is correct before proceeding.

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

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

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

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

6. Update the following fields:

Field Name	Description	Values
EE Position	Position number assigned to the employee	Enter value in EE Position. **Example**: 65001505
Annual Salary	Employee's annual basic pay	Enter value in Annual Salary. **Example**: 52174

7. Click the **Enter** button.

Enter the new EE Position number which you are transferring the person TO; then click Enter. This will process a system validation, and change the Personnel Area and Personnel Subarea to match the new position.

Enter the new salary/hourly information in the Annual Salary or Hourly Salary field. Click Enter to validate the data.

If the employee is an hourly employee, nter the **hourly** amount. The annual amount doesn't populate for hourly/salary employees. The system will calculate on IT0008 Basic Pay when created.

*Fields with **√** check marks are mandatory.


❌ **CRITICAL!**	You will notice as you're entering data that there is an order in which the system prefers to receive data. If this is a Pay Grade to Banded transfer (or Banded to Pay Grade transfer), enter the Pay Scale type, Pay Scale Area and Pay Scale Group on the right side before clicking Enter. If you enter the Pay Scale type and Pay Scale Area and click Enter before entering the Pay Scale Group, the system will give you an error message stating, "No entry in table T710 for the key XXXXX." This means that the combination of Pay Scale type and area don't match the Pay Scale Group, until you change to the new Pay Scale Group. Click Enter to pass by this message and complete all fields or enter all fields prior to clicking Enter to avoid this message.
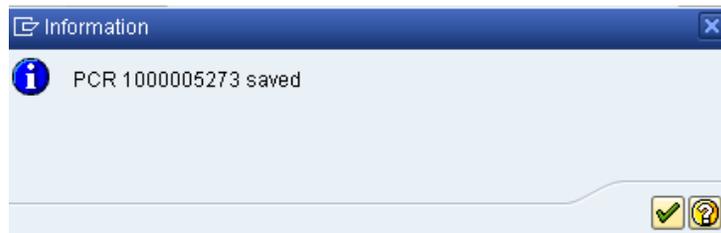
You can save this information as many times as you like. Each time you will receive a confirmation of the save. You will not be able to create a note attachment until you have saved it at least once. If you have submitted the PCR to workflow already, you will not be able to change the details, nor save any new information, only display the existing details.

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

   Review the data prior to saving. If the data is correct, click Save.
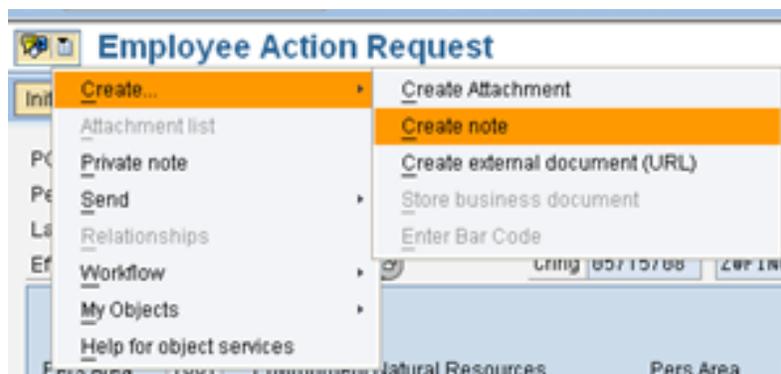
9. Click the **Services for Objects** button.

---

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, 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
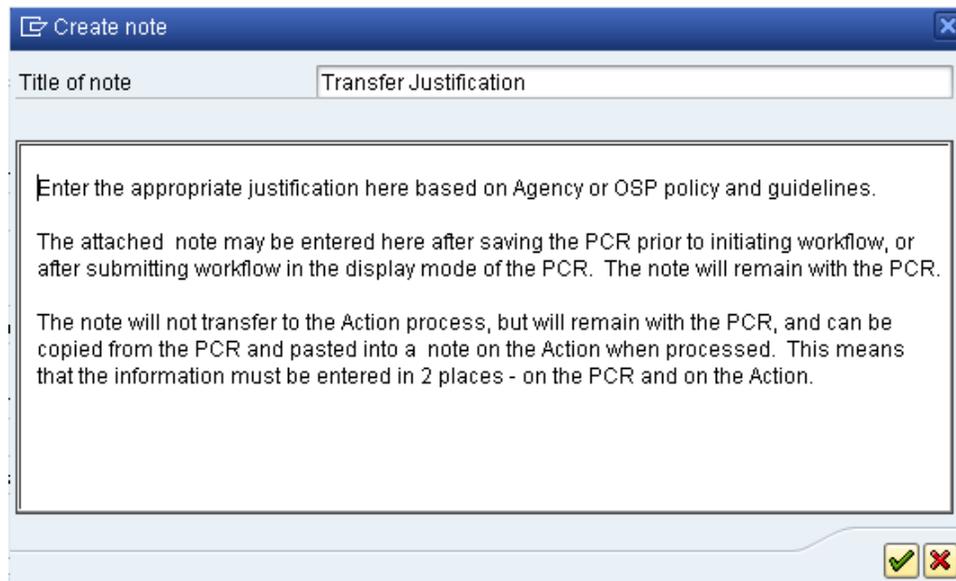
11. Update the following fields:

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**: Transfer Justification
Long text	An open text field	Enter value in long text. **Example**: appropriate information

12. Click the **(Enter)** button.

Employee Action Request

Initiate WF

PCR Number	1000005273			
Personnel Number	80000035 Sheila Jenkins	Action:	Z8	Transfer (NC)
Last 4 digits(SSN)		Reason:	01	Agency to Agency - Lateral
Effective on	06/20/2011	Chng 06/16/11 ZWFINOMPA031 St: D		Created

CURRENT | | **PROPOSED**

	CURRENT			PROPOSED	
Pers.Area	1601	Environment Natural Resources	Pers.Area	4601	Cultural Resources
Subarea	AC01	7day Norm	Subarea	NC01	7day Norm
EE Group	A	SPA Employees	EE Group	A	SPA Employees
EE Subgroup	A1	FT N-FLSAOT Perm	EE Subgrp	A1	FT N-FLSAOT Perm
Org. Unit	20003893	ENR SO ASIT Asst Sect-IT	Org. Unit	20010303	CR CDS ARTS COUNCIL Assis
Job	30000804	Administrative Officer II	Job	30010238	Assistant Director - Arts
EE Position	65002443	Contracts Administrator	EE Position	65001505	Assistant Director - Arts Counc…

Basic Pay

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

Dates

	Last day worked

13. Click the **Initiate WF** [Initiate WF] button.

   Select the Initiate Workflow button to send the Transfer 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).

Information

PCR 1000005273 successfully sent to Work Flow

14. Click the **(Enter)** button.

15. Click the **Back (F3)** button.
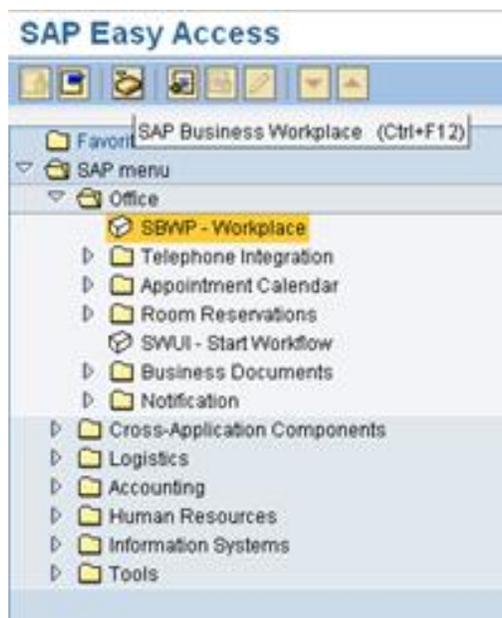16. The Initiate Transfer Action is complete.

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

Instructions for Completing the Action
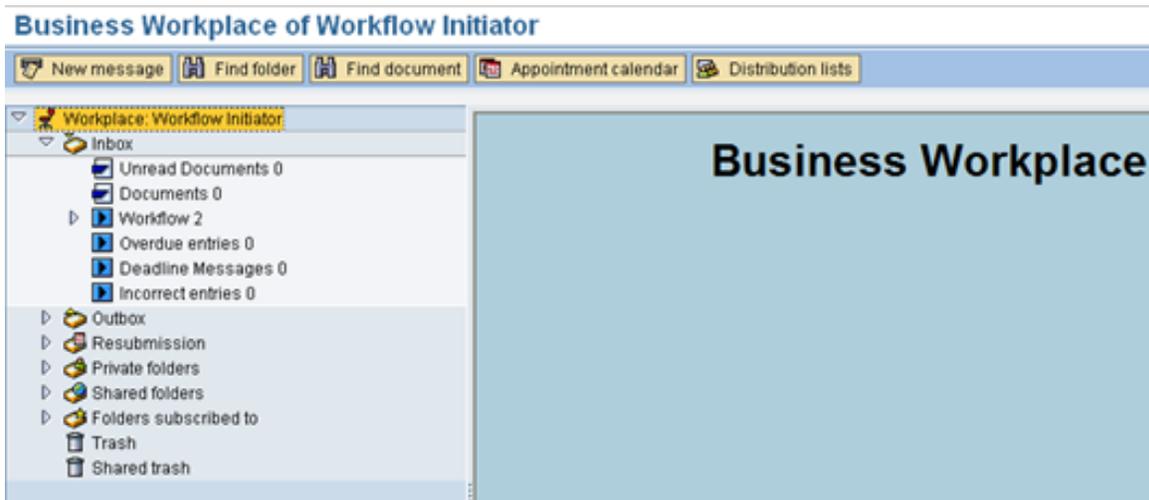
Access Transaction:

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

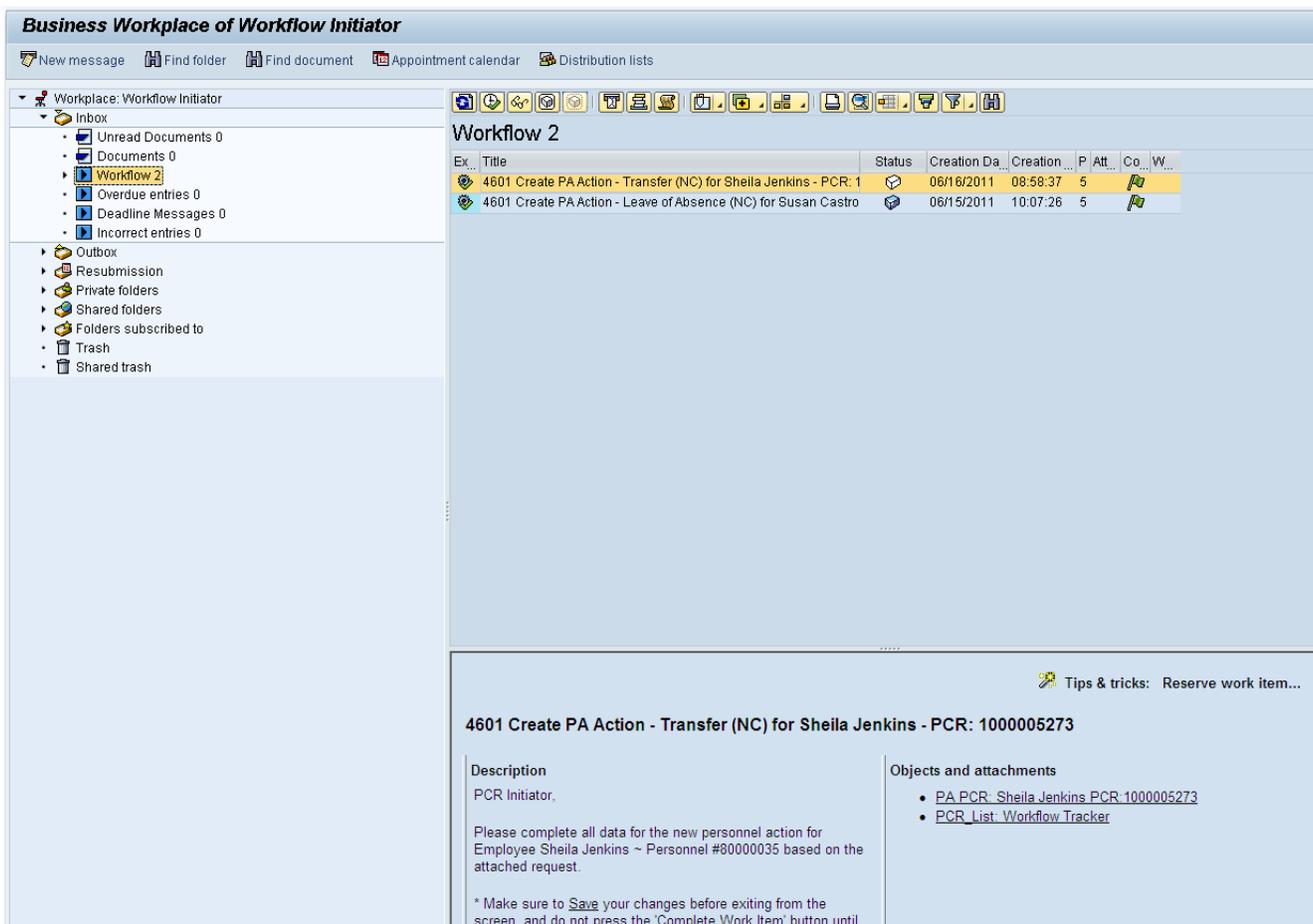**Via Transaction Code:** SBWP, PA30

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

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


18. Select **Inbox >> Workflow**.

    Process using step 19 or step 20.

19. Select the **PCR** 4601 Create PA Action - Transfer (NC) for Sheila Jenkins - PCR: 1000005273 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. Once the PCR is executed the Transfer action will be launched.

20. Click the **Execute (F8)** button.
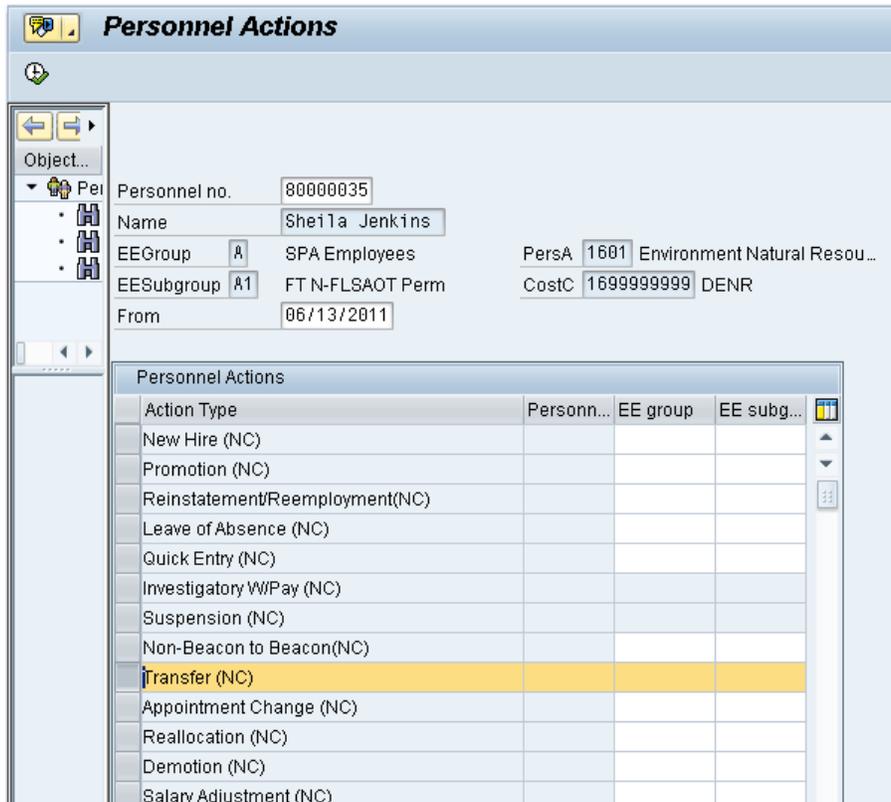
Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From. **Example**: 06/13/2011

21. Highlight the **Transfer (NC)** action type.

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

Verify this is the individual for whom you will be processing the Transfer action.

❌ **CRITICAL**!	The effective date is the date the Transfer 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 Transfer is to be effective).

Copy Actions (0000)

Execute info group   Change info group

Pers.No.   80000035
Name   Sheila Jenkins
EEGroup   A   SPA Employees   PersA 1601 Environment Natural Resources
EESubgroup A1   FT N-FLSAOT Perm
Start   06/13/2011 to   12/31/9999

Personnel action

Action Type	Z8 Transfer (NC)
Reason for Action	01 Agency to Agency - Lateral

Status

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

Organizational assignment

Position	65001505 Assistant Director - Arts
Personnel area	4601 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

23. Click the **Enter** ✓ button.
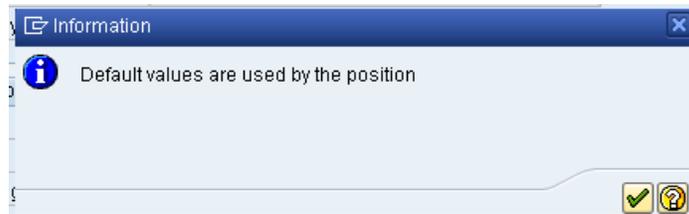
24. Click the **Enter** ✅ button.

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

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

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

25. Click **Edit, >> Maintain text** to add your comment based on agency or OSHR Policy/Guidelines. Remember you can cut and paste from the PCR.

26. Click the **Enter** ✅ button.

27. Click the **Save (Ctrl+S)** 💾 button.

Create Organizational Assignment (0001)

Org Structure

Personnel No	80000035	Name	Sheila Jenkins	
EEGroup	A	SPA Employees	PersA	1601 Environment Natural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active
Start	06/13/2011 to	12/31/9999		

Enterprise structure

CoCode	NC01	STATE OF NC				
Pers.area	4601	Cultural Resources	Subarea	NC01	7day Norm	
Cost Ctr	4699999999	CULTURE RESOU…	Bus. Area	4600	Cultural Resources	
			Fund	469999999	CULTURE- SUSP…	
Func. Area	6000000000000001	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	65001505	800904000627
		Assistant Director - Ar…
Job key	30010238	Ast Dir - Ar
		Assistant Director - Ar…
Org. Unit	20010303	48060303421
		CR CDS ARTS COUN…
Org.key	46014699999999	

28. Click the **Enter** button.

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

Create Vacancy

S   65002443 Contracts Administrator

Create on   06/13/2011

Yes   No   Cancel

30. Click the **Yes** button.

Click **Yes** to create the vacancy for the position that the person is leaving.

---

31. Click the **Yes** [Yes] button.

    Click **Yes** to delimit the vacancy of the position to which the person is going.

32. Click the **Enter** [icon] button.

    Information:

    Review the caution messages and save the data.

    System defaults Date Types with Action Effective Date:

    - o   02 Agency Hire Date

    Also, for specific Jobs in Judicial defaults Date Type:

    - o   04 Judicial Anniversary Date

    NOTE: This infotype is not created for Supplemental Staff.

33. Click the **Save (Ctrl+S)** [icon] button.

Create Related Experience (9822)

Personnel No		Name		
EEGroup	A	SPA Employees	PersA	Health Human Services
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active
Start		To	12/31/9999	

(Not to be used for Supplemental Staff)

Classification

Position	65002858	800904001427	
		Facility Survey Consult I	
Job	30002888	Fac Survey C	
		Facility Survey Consultant I	

Related Work Experience

Months	6	Calculated Months:	0

Related Education

Months	48

34. 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:

    o Related Work Experience

    o Related Education Months

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

Copy Planned Working Time (0007)

Work schedule

Personnel No	▓▓▓▓▓	Name	▓▓▓▓ ▓▓▓▓	
EEGroup	A	SPA Employees	PersA	4601 Natural and Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu	Active
Start	▓▓▓▓▓	To	12/31/9999	Chg. ▓▓▓▓ ▓▓▓

Work schedule rule

Work schedule rule	D01N08GN	MTWHF-8,SaS-O	WSR Finder
Time Mgmt status	1 - Positive Time Recording		▾
Working week	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	0.00

Additional fields

☐ Telework Eligible

36. Click the **Enter** ✅ button.

Adjust their work schedule as appropriate and save the data.

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

If the individual is part-time, be sure to check the Part-time employee box.

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%.

37. Click the **Save (Ctrl+S)** 💾 button.

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

38. Click the **Cancel (F12)** ![cancel button] 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**.

39. Update the following field:

Field Name	Description	Values
Reason	Reason for the action, such as Transfer	Enter value in Reason. **Example**: Z8

40. 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 this Transfer [Z8] 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).

Manually enter the hourly rate in the amount field; hit enter annual salary automatically calculates.

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

Copy Unemployment State (0209)

Personnel No	80000035	Name	Sheila Jenkins
EEGroup	A	SPA Employees	PersA 4601 Cultural Resources
EESubgroup	A1	FT N-FLSAOT Perm	Statu Active
Start	06/13/2011 to		12/31/9999

Unemployment data

Tax authority	NC	North Carolina
Worksite	24	Dept of Cultural Resources

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

42. Click the **Enter** ✅ button.

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

44. 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**: 551160

45. Click the **Enter** ![button] button.

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

Comments ca 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 another PA30 transaction in order to add the additional line items to infotype 0040.

46. Click the **Save (Ctrl+S)** ![button] button.

The objects on loan items and information may change. Adjust as appropriate and save the data.

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

48. Click the **Complete Item** ✅ Complete Work Item button.

> Only once all of the infotypes 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.

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
      - ▸ 📁 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
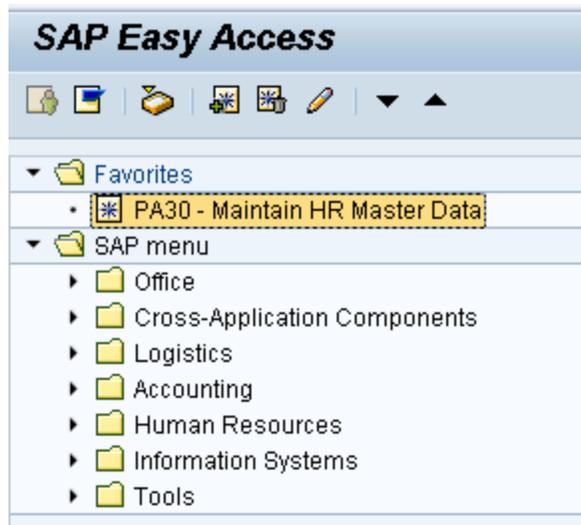 - ▸ 🗐 Resubmission
  - ▸ 🗐 Private folders
  - ▸ 🗐 Shared folders
  - ▸ 🗐 Folders subscribed to
  - • 🗑 Trash
  - • 🗑 Shared trash

Workflow 1

Ex	Title	Status	Creation Da	Creation	P	Att	Co	W
◈	4601 Create PA Action - Leave of Absence (NC) for Susan Castro - PCR: 10000052	◈	06/15/2011	10:07:26		5		⚑

49. Click the **Back (F3)** 🔙 button.

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

SAP Easy Access

🗐 🗂 | 🖨 | 🗐 🗐 🖊 | ▾ ▲

- ▾ 📁 Favorites
  - • ✳ PA30 - Maintain HR Master Data
- ▾ 📁 SAP menu
  - ▸ 📁 Office
  - ▸ 📁 Cross-Application Components
  - ▸ 📁 Logistics
  - ▸ 📁 Accounting
  - ▸ 📁 Human Resources
  - ▸ 📁 Information Systems
  - ▸ 📁 Tools

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

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