

CHANGE POSITION EMPLOYEE GROUP/SUBGROUP (ACTION 116)



BUSINESS PROCESS PROCEDURE OM-38 | TRANSACTION ZOMA069

The purpose of this Business Process Procedure is to explain how to change the position employee group/subgroup in the Integrated HR-Payroll System.

Trigger: There is a need to change the position employee group or subgroup.

Business Process Procedure Overview:

This action is used when a change occurs to the appointment type or an FLSA overtime calculation rule for a position. The position number does not change.

Tips and Tricks:

See the OM Tips and Tricks Job Aid for a full listing of Best Practices and Tips & Tricks. The job aid is located on the Training HELP website <u>https://www.ncosc.gov/training/hr-payroll-help-documents</u>.

- **Copy** is to be used most of the time. This will delimit the existing record and create a new record with the start date given. Copying keeps a history of the old record.
- **Change** is to be used only if you make a spelling or other simple error and want to change the record. There is no history tracked on what the record used to be if you use the change functionality.

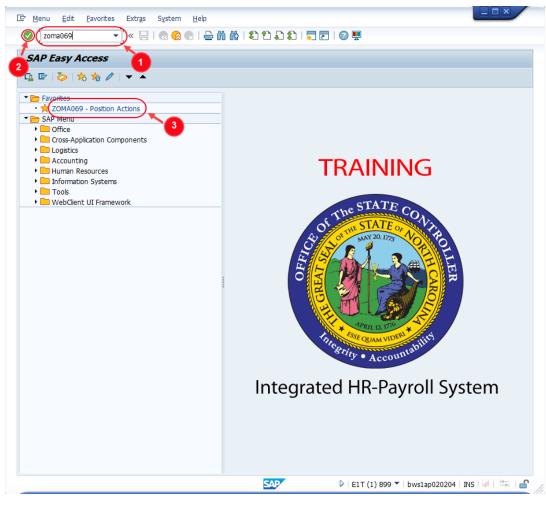
Access Transaction:

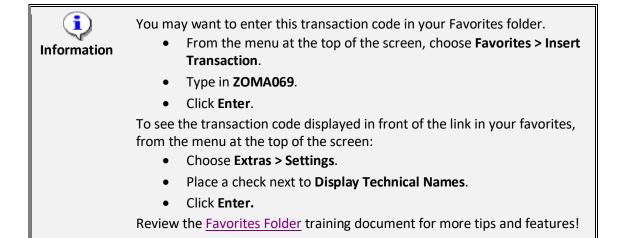
Via Menu Path: This transaction code is not on the menu path. Enter the transaction code in the **Command Field** (white field in the upper left-hand corner of the screen. If the Command field is not visible, click the gray triangle in this area to display it). Click **Enter** once the transaction code has been entered.

Via Transaction Code: ZOMA069

Procedure

Type ZOMA069 in the command field (1). Hit enter on your keyboard or click the Enter Subtrom (2). Also, you can double click it from your favorites folder if you've previously saved it there (3). See the information block below the screen shot for a quick tutorial on adding the transaction.





2. Use action code **122** to complete a county change action. It may be typed directly into the **Action** field or you can use the **Matchcode** button to select it from a list of all available actions.

Position A	ctio	n	
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Position			
Action			
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	٦	ype of Action (1) 14 Entries found	×
		Restrictions	
		⊠ #1 #2 10 10 10 10 10 10 10 10 10 10 10 10 10	
		Action text	
	100	Create New Position	
	102	Re-Establish Position	
	103	Reallocate Position Up	
	104	Reallocate Position Down	
	105	Reallocate Position Horizontal	
	106	Position Adjustment from Auth	
	107	Reallocate Position Differential	
	108	Remove Position Differential	
	113	Position Transfer	
	115	Position Hours Change	
		Position Employee Group/ Subgroup Change	
	118	Position Competency Level Change	
		Position County Change	
	124	Change Supervisor of Position	
	14	Entries found	

3. Click the **Enter** button rear the top of the window. You will be able to verify that you've chosen the correct action, and two new editable fields will be available.

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	Position				
	Action			116	

 Input the **Position** number needing the Employee Group/Subgroup change. This document will use 60087100 from the OSC training environment. <u>Access client 899</u> to follow along in a "live" system. Next, input the **Valid from** (effective) date of the new data.

IMPORTANT: If the position is occupied by an employee, the effective date for this position action must be the same as the effective date for the corresponding personnel action. Please contact the appropriate HR staff within your agency to coordinate the required OM and PA actions. The PPOSE or PO13D transactions can be used to determine if the position is currently held by an employee.

The OM action should precede the PA action!

Position Action	
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Position	
Action	116 Position Employee Group/ Subgroup Change
Position	60087100
Valid from	5/5/22 D 12/31/9999

5. Click the **Enter** button ^{SO} and verify the position displayed is the one you need to change.

Alert! Be vigilant on this step. Once you complete the next step, the **Action** type and **Valid from** date are locked in. They can only be changed by starting over.

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Position	60087100 Public Information Director I
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6. Click the **Create** button.

Position Action	
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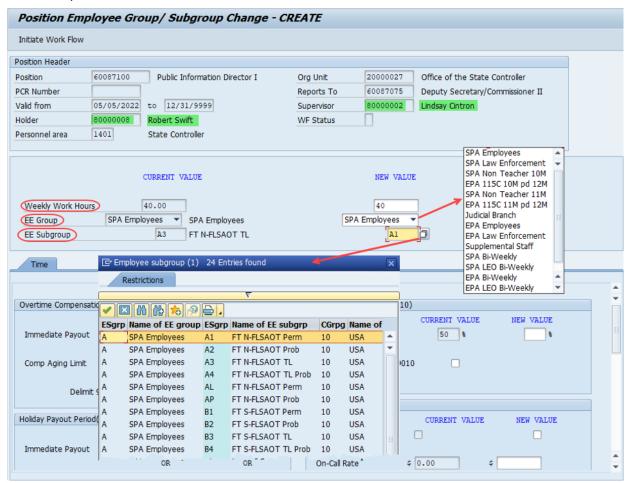
 Enter the applicable data in the Weekly Work Hours, EE Group and EE Subgroup fields. While it is not necessary that *all* the fields have new values, each of the fields must be completed and the EE Group *and/or* EE Subgroup must have a new value.

The **EE Group** field has a drop-down menu which is recommended for use. Once this field is completed, then you may use the **Matchcode** button in the **EE Subgroup** field. You also may type the EE Subgroup *Key* value directly in the field.

The <u>EE Group/Subgroup Job Aid</u> is a useful resource when completing this OM action.

NOTE: The data used in this example is provided for sample purposes only. The data will change depending on the Agency and specific position being changed.

If the affected position has a **Holder**, it will be displayed in the Position Header section, as will the name of their **Supervisor** if that is an occupied position. These fields can be used to verify that the correct position number has been selected.



8. Update the fields in the **Time** tab as appropriate. These fields are not required and if no data is entered, the position will retain its current settings. There are a total of 10 fields that may be updated and the scroll bar on the right will need to be used to access them.

The <u>OM Infotypes</u> document is a helpful resource for information about each of these settings.

EE 5 /group A3 F1 N-FLSAUT 1L A1	
Time	
	^
Overtime Compensation(9005) Holiday Premium Rate(9010)	
CURRENT VALUE NEW VALUE CURREN	NT VALUE NEW VALUE
Immediate Payout Holiday Premium Rate	
OR OR	
Comp Aging Limit 365 Days 90 Days Delimit 9010	
Delimit 9005	
On-Call(9011)	
Holiday Payout Period(9006)	ENT VALUE NEW VALUE
CURRENT VALUE NEW VALUE On-Call Comp Accrued	
Immediate Payout	
OR OR On-Call Rate \$ 0.00	\$

9. Click the **Enter** button. Review and verify that you've entered the correct data.

(CURRENT VA	LUE	NEW VALUE	
Weekly Work Hours EE Group EE Subgroup		SPA Employees FT N-FLSAOT TL	40.00 SPA Employees A1 FT N-FLSAOT Perm	
Time				
Overtime Compensation	. ,		Holiday Premium Rate(9010)	•
Immediate Payout	CURRENT VALUE	NEW VALUE	CURRENT VALUE NEW VALUE Holiday Premium Rate 50 %	33
Comp Aging Limit	365 Days	90 Days	Delimit 9010	
Delimit 9	005			

10. Click the **Save** 🔚 button.

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Positio	on Employ	ee Grou	ip/ Subgroup Chai	nç

 Record the pertinent data in your OM Transaction log. OSC Training recommends recording the PCR Number, Position, Valid From date, Action Type and date of initiation at a minimum. This data can be used to track your request through the Workflow process.

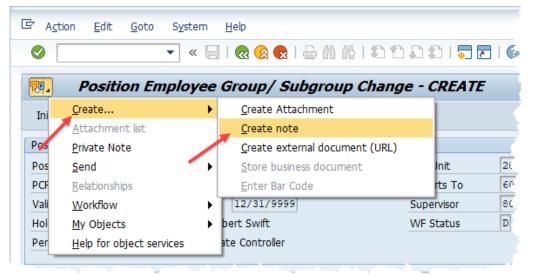
A sample transaction log is on the last page of the OM210 student guide which may be found on the OSC Training System Courses web page.

Position	60087100	ublic Information Director I	Org Unit	20000027	Office of the State Controller	
PCR Number	5000002125	-	Reports To	60087075	Deputy Secretary/Commissioner II	
Valid from	05/05/2022	to 12/31/9999	Supervisor	80000002	Lindsay Cintron	
Holder	8000008	Robert Swift	WF Status	D	Created	
Personnel area	1401	State Controller				
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 Add a note. This is a required step and is not optional. Access the <u>OM Action Notes Template</u> help doc to utilize the template for a Position Employee Group/Subgroup Change action. Copy this template into your clipboard. (Highlight the needed cells then press Ctrl-C *or* Right click and choose *Copy*)

Position Employee Group/Subgroup Change		
PCR Initiator Name/PRNR:		
PCR Creation Date:		
PCR Effective Date:		
PCR #:		
EE Group/Subgroup From/To:		

13. Return to your SAP window and click the right side of the **Services for Object** button to access the dropdown menu. Hover over **Create** and then click on **Create Note**.



14. Give your note a title and then click into the bottom area of the pop-up screen. Paste the template (Ctrl-V or Right click and choose *Insert*) and then complete the required data.

🖙 Create note		×
Title of note	Position EE G/SG Change - 60087100	
Position Employee Gro PCR Initiator Name/PR PCR Creation Date: 4/ PCR Effective Date: 5, PCR #: 5000002125	NR: J.P. Smith/12345678 30/22	
	rom/To: SPA & A3 to SPA & A1	
		×
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15. Click the **Copy** button to save your note. You will receive a message that your note was successfully created.

The note was successfully created	SAP	🕨 E1T (2) 802 💌 bws1ap020204 INS 🌽 🔄 📔

16. Click the Initiate Work Flow Initiate Work Flow button.

NOTE: Clicking the **Initiate Workflow** button will lock in your data and no changes can be made unless the PCR is rejected and sent back to you. Prior to clicking this button, you can make changes to your proposed data by using the Change button within the ZOMA069 transaction.



17. You will receive a message that your Workflow has been submitted.

Position Action	
Position	
Action 116 Position Employee Group/ Subgroup Change	
Position 60087100 Public Information Director I	
Valid from 05/05/2022 to 12/31/9999	
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18. You can use the PCR number and position ID to track your request through the Workflow process. The <u>OM Workflow Report</u> help document demonstrates how to do so.

The system task is complete.

Change Record

- 9/26/13 New format and screen captures Dana Lyle
- 11/15/21 Updated format and assigned reference number Claire Ennis
- 8/1/22 Re-written for accessibility, clarity, and updated screen shots. Doug Genzlinger
- 1/28/25 Updated links to point to new OSC website Doug Genzlinger