

Organizational Change for Employee (PA40)

Purpose

The organizational change action is used to process changes in an employee's position or organizational unit resulting from promotion, demotion, lateral transfer, addition of a position assignment, ending a position assignment or reclassification. This action is not used for transferring employees to another campus or to change an employee to an unpaid position.

Prerequisites:

- Complete PAF form & acquire appropriate approval signatures.

If the employee has more than one position and you are changing or ending one of them please see the prerequisites below. You will use this information to re-enter the employee's primary position number on IT0001 Organizational Assignment screen and to re-enter the employee's current hourly or monthly rate of pay if it is NOT changing on IT0008 Basic Pay screen.

- Start and end dates of the original hire
- Current position number
- Current salary/pay rate



To find this information, use the **PA20 Display Employee Master Data** transaction to look at infotypes 0000 Actions (primary position #), 0008 Basic Pay (hourly or monthly rate), and 0041 Date Specifications (Original Hire Date referred to as First Working Day).

Menu Path

Start the transaction using the menu path or transaction code.

SAP Menu:

- Human Resources → Personnel Management → HR Master Data → Personnel Actions

Transaction Code:

PA40

Helpful Hints & Reminders:

When viewing a field definition table, use the following guidelines for reading the **R/O/C** column:

- R** = Required
- O** = Optional
- C** = Conditional

- Do NOT page forward on any screen unless instructed to in the following pages.

Personnel Actions

Action Type	Personn...	EE group	EE subgr...
Univ Hire			
Univ Student Hire			
Univ Ancillary Hire			
Univ Volunteer Hire			
Univ. NRA Hiring Addendum			
Univ NRA Implementation			
Univ Funding Change			
Univ Empl% (FTE)/Sched Change			
Univ Rate/Salary Change			
Univ Org Change			
Univ Separation			

2. As required, complete/review the following fields:

Field Name	R/O/C	Description
Personnel no.	R	Enter employee's personnel number. Example: 10159
From	R	Enter effective date for organizational change. Example: 03/15/2013

3. Click the margin box beside .

4. Click  (Execute).

Copy 0000 Actions

Infotype Edit Goto Extras System Help

Copy 0000 Actions

Execute info group Change info group

Pers.No. 10159
 Terrance R Jones Active
 UNMC REG MGR PROF SALARY
 PEDIATRICS
 Start 03/15/2013 to 12/31/9999

Personnel action
 Action Type 09 Univ Org Change
 Reason for Action 44

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


Organizational assignment
 Position 30000051 Coordinator
 Personnel area 3000 UNMC
 Employee group A Active
 Employee subgroup B1 REG MGR PROF SALARY

5. As required, complete/review the following fields:



Refer to the Organizational Change Action Codes on Sapphire Reference Guides for additional explanation. If the employee was previously on an “Employee Pause” action please enter “06” in the Reason for Action field. This code stands for Other Status Change.



Click  (Search) to search for/select appropriate field value when available.

Field Name	R/O/C	Description
Reason for Action	R	Select appropriate reason code for organizational change. Example: 44
Position	R	Enter new position number for the primary appointment. This position number will be the same on IT 0001 Organizational Assignment. Example: 30000051


6. Click  (Enter). Pop-up box appears informing you default values are used by position.



Information



The Personnel area, Employee group and Employee subgroup default to values assigned to position.

7. Click  (Continue). Message '**Record valid from mm/dd/yyyy to 12/31/9999 delimited at end**' appears.

8. Click  (Enter). If information entered is complete, message '**Save your entries**' appears on the message bar at the bottom of the screen.

9. Click  (Save). If prompted with warning message(s), click  (Enter) until you advance to the next screen and the message '**Record created**' appears.

Copy 0001 Organizational Assignment

Copy 0001 Organizational Assignment

Org Structure

PersNo Terrance R Jones

UNMC Active

PEDIATRICS REG MGR PROF SALARY

Start to

Enterprise structure

CoCode University of Nebraska

Pers.area UNMC Subarea PEDIATRICS

Cost Ctr Bus. Area UNMC-Auxiliary Operations

Personnel structure

EE group Active Payr.area Monthly

EE subgroup REG MGR PROF SALARY Benefit %

Organizational plan

Percentage

Position Integration: default p...

Job key

Org. Unit



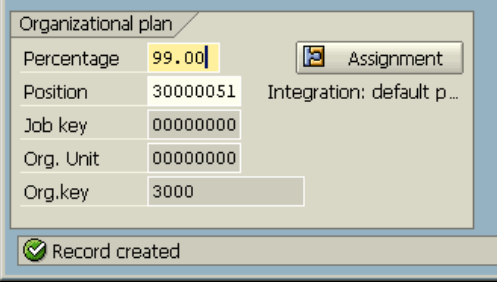

Org.key






If employee holds more than one appointment with the University, the position entered on this infotype must be the primary appointment. Additional appointments are also maintained on IT 9001 Appointments.

10. As required, complete/review the following fields:

Field Name	R/O/C	Description
Benefit %	C	<p>Do NOT change the Benefits percentage.</p> <p> Once you have completed this action SAP will generate a workflow notification e-mail that will be sent to the Benefits office. They will review the change and update the Benefit percentage if necessary.</p>

Field Name	R/O/C	Description
Percentage	C	<p>System defaults to 100%, so if the employee will have only one position than no change needs to be made to this field.</p> <p> If employee is assigned to more than one position then subtract 1.00 percent for each additional appointment to calculate the percentage you will enter in this field and then click .</p> <p>Example:</p> <p>99.00 if employee has one additional paid position.</p> <p>98.00 if employee has two additional paid positions.</p> 
Position	R	<p> System defaults to 99999999. Enter the position number. This needs to be the same position number as entered on IT 0000 Actions.</p> <p>Example: 30000051</p>

11. Click  (Enter). If information entered is complete, message **'Save your entries'** appears on the message bar at the bottom of the screen. If the employee was previously on an "Employee Pause" please verify that the Payroll Area field now shows as BW if the employee is bi-weekly paid or MO if the employee is monthly paid before saving this screen.

12. Click  (Save). If prompted with warning message(s), click  (Enter) until you advance to the next screen and the message **'Record created'** appears.



If employee has more than one position a pop-up box appears, allowing you to assign the employees additional position(s). If employee only has one position skip steps 13 and 14.

13. As required, complete/review the following fields:

Field Name	R/O/C	Description
Position	R	Enter position number(s). Example: 30000161
Percent	R	Enter percentage of working time spent in second position. Example: 1.00
End Date	R	Enter 12/31/9999.



You will need to continue with this step until the percentage totals 100% for all positions for which employee is assigned. Additional information on these appointments is maintained on IT 9001 Appointments (i.e., Start/End Dates, Budgeted Salary and Budgeted FTE). If the employee is part-time (50%), they are assigned to one position and percentage would be 100.00. IT 0007 Planned Working Time is the infotype to define Employment Percent relative to their contract and IT 9001 Appointments is the infotype to define Budgeted FTE percent.

14. Click Continue.



If the **General Benefits Information** pop-up box appears you will need to enter effective date of action in **From** date field. Click (Save).



If the **Relationships** screen appears just click (Enter). If warning message(s) appear on the message bar at the bottom of the screen, click (Enter) until advanced to the next screen.

Copy 0007 Planned Working Time

Infotype Edit Goto Extras System Help

Copy 0007 Planned Working Time

Work schedule

PersNo 10159 Terrance R Jones

UNMC Active

PEDIATRICS REG MGR PROF SALARY

Start 03/15/2013 To 12/31/9999

Work schedule rule

Work schedule rule SALARY Salary - paid monthly

Time Mgmt status 9 Tm.eval.(plan)

Working week 02 Working week Thursday @ 23:01

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	5.00

Additional fields

Leave Plan 2B 12MO Mgr/Prof Vac/S Contract Length 12/12 months




If the Employment Percent is less than 100%, a check mark will be populated beside **Part-time employee** and **Dyn. daily work schedule** fields.







Review previous data for accuracy. If no information has changed skip step 15.





15. As required, complete/review the following fields:



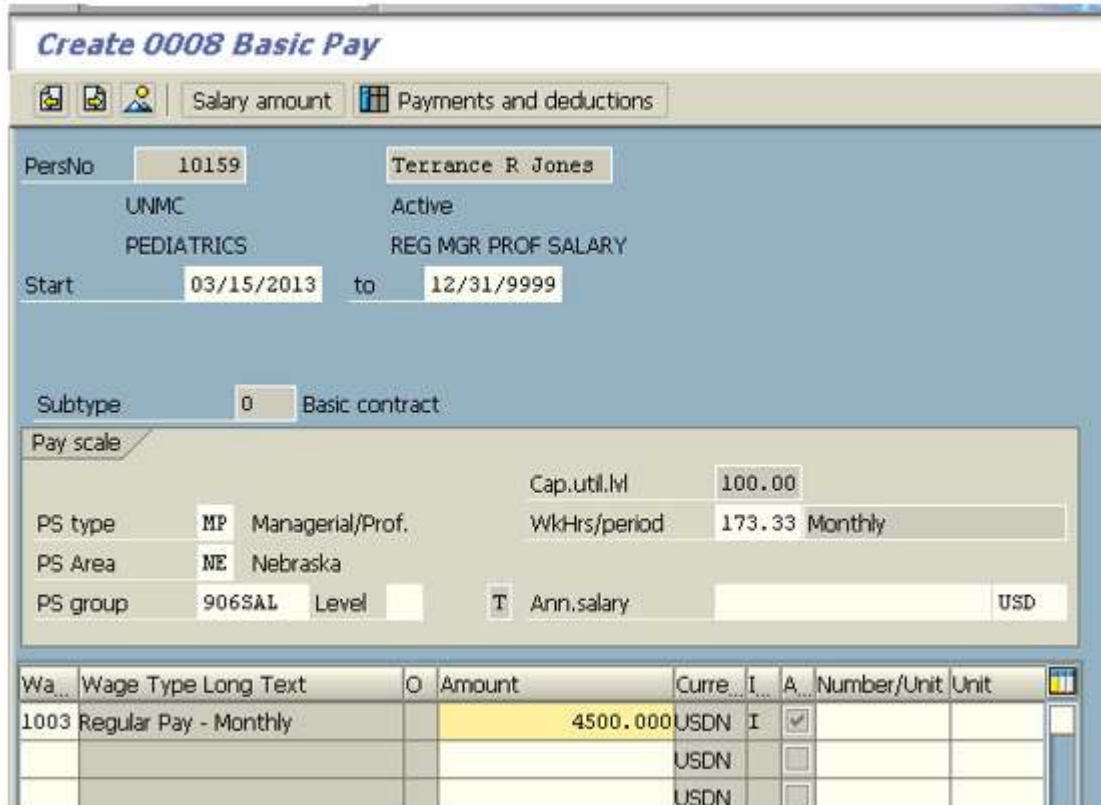
Click  (Search) to search for/select appropriate field value when available.

Field Name	R/O/C	Description
Work schedule rule	C	System defaults to work schedule rule based on employee subgroup. Edit to select work schedule rule which may apply more closely to employee.
Time Mgmt status	C	System defaults to value based on employee subgroup assigned to position.  If you are changing a default value, note that certain Employee Subgroups cannot deviate from defaulted time management status.
Employment percent	C	No action required unless employment percent is changing. <p style="text-align: center;">If the FTE % is 100 and being reduced then click the check box next to Part-time employee check box.</p> <p style="text-align: center;">If the FTE % is changing to 100% then you will need to remove the check from the Part-time employee & dyn. Daily work schedule check box.</p>  If you are adding a TEMP appointment and the employee's primary position is REGULAR do NOT add the percentage for the TEMP appointment or the employee's vacation and sick leave will not accrual accurately.
Leave Plan	R	Select applicable leave plan for employee's leave accrual. Example: 2B
Contract Length	R	Select appropriate contract length based on employee's term of employment with the University. Example: 12

16. Click  (Enter). If the Employee Percent is less than 100.00, a warning message asking you to check basic pay will display. Click  (Enter). Then a warning message will display asking if you wish to create a dynamic work schedule for Employment Percent less than 100.00.

17. Click  (Enter). Message 'Record valid from mm/dd/yyyy to 12/31/9999 delimited at end' appears.
18. Click  (Enter). If information entered is complete, message 'Save your entries' appears on the message bar at the bottom of the screen.
19. Click  (Save). If prompted with warning message(s), click  (Enter) until you advance to the next screen and the message 'Record created' appears.

Create 0008 Basic Pay



Create 0008 Basic Pay

Salary amount Payments and deductions

PersNo: 10159 Terrance R Jones

UNMC Active

PEDIATRICS REG MGR PROF SALARY

Start: 03/15/2013 to: 12/31/9999

Subtype: 0 Basic contract

Pay scale

Cap.util.lv: 100.00

PS type: MP Managerial/Prof. WkHrs/period: 173.33 Monthly


PS Area: NE Nebraska




PS group: 906SAL Level: T Ann.salary: USD

Wa...	Wage Type Long Text	O	Amount	Curre...	I...	A...	Number/Unit	Unit
1003	Regular Pay - Monthly		4500.000	USDN	I	<input checked="" type="checkbox"/>		
				USDN		<input type="checkbox"/>		
				USDN		<input type="checkbox"/>		

20. As required, complete/review the following fields:






Click  (Search) to search for/select appropriate field value when available.

Field Name	R/O/C	Description
Wage type	R	 The wage type should always be reviewed and <u>the salary amount must always be re-entered</u> to ensure that it processes correctly and is no longer tied to the wage table. Select appropriate wage type. Example: 1001 Bi-Weekly 1003 Regular Monthly 1037 Temporary Monthly
Amount	R	 Rate of pay defaults to minimum rate of PS Group (salary grade). The “I” in the Indicator Value field indicates that the wage type and salary amount are display fields. Enter employee’s rate of pay. For salaried employees – enter monthly salary. For hourly paid employees – enter hourly pay rate.  If employee has <u>more than one position</u> : For salaried employees – enter total pay for all positions. For hourly paid employees – enter hourly pay rate for the primary appointment on IT 9001 Appointments. Example: 4,500.000

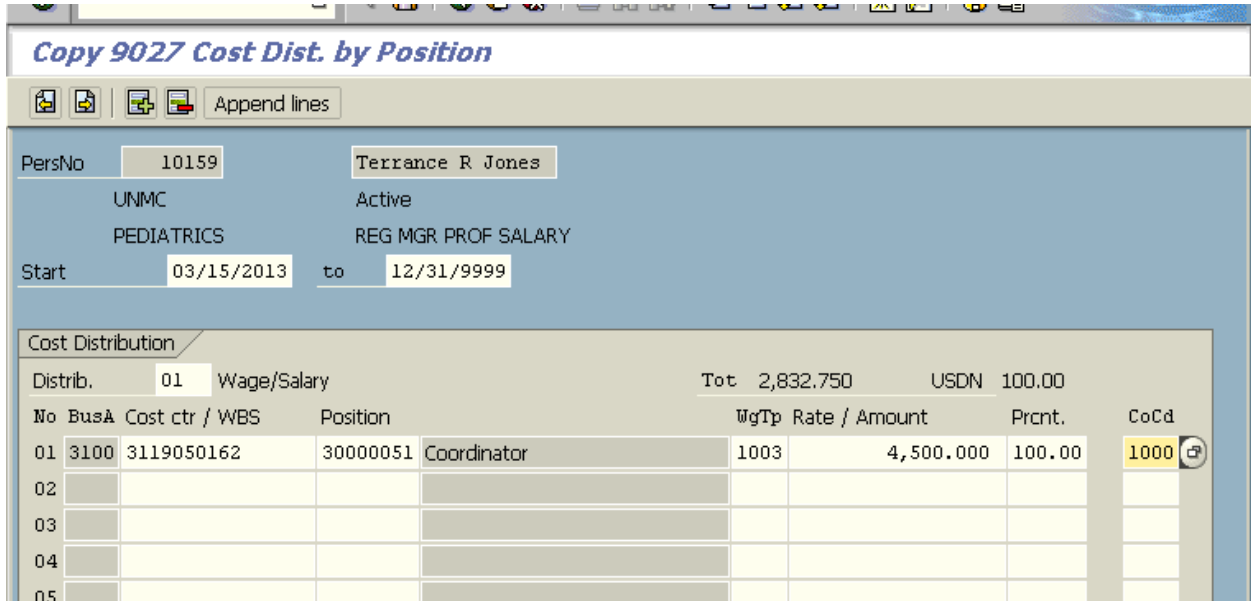
21. Click  (Enter). Message '**Annual salary not within range**' appears. Ignore the message.


22. Click  (Enter). Message '**Record valid from mm/dd/yyyy to 12/31/9999 delimited at end**' appears.

23. Click  (Enter). If information entered is complete, message 'Save your entries' appears on the message bar at the bottom of the screen.

24. Click  (Save). If prompted with warning message(s), click  (Enter) until you advance to the next screen and the message 'Record created' appears.

Copy 9027 Cost Dist. by Position




Employee's previous position will default. If you are deleting lines you MUST change the other lines percentage so they total to 100. Then for the line you want to delete, click the line number on the left and then click  (Delete Line).




Review previous data for accuracy. If no information has changed skip step 25.

25. As required, complete/review the following fields:





Click  (Search) to search for/select appropriate field value when available.



Field Name	R/O/C	Description
Cost ctr/WBS	R	Enter cost center/WBS element for distribution of costs associated with employee's pay and benefits. Example: 3119050162
Position	R	Enter position number. Example: 30000051

Field Name	R/O/C	Description
WgTp	R	Select appropriate wage type. Example: 1001 Bi-Weekly 1003 Regular Monthly 1037 Temporary Monthly
Rate / Amount	R	For salaried employees – enter monthly amount to be distributed to each applicable cost center/WBS element by position. For hourly paid employees – enter hourly rate for position. Example: 4,500.000
Prcnt	R	For salaried employees – leave blank. Percent is calculated based on amount entered. For hourly paid employees – enter appropriate percent for distribution of employee’s pay and benefits.  For hourly paid employees, total of percent fields cannot be greater or less than 100.00.
CoCd	R	Enter 1000 for all cost center/WBS elements.

26. Click  (Enter). Message ‘**Record valid from mm/dd/yyyy to 12/31/9999 delimited at end**’ appears.

 The **Tot** field indicates total monthly pay (for salaried) or hourly rate times 80 hours (for hourly paid). Also, total percent of 100.00 appears.

27. Click  (Enter). If information entered is complete, message ‘**Save your entries**’ appears on the message bar at the bottom of the screen.

28. Click  (Save). If prompted with warning message(s), click  (Enter) until you advance to the next screen and the message ‘**Record created**’ appears.

Copy 9001 Appointments

Copy 9001 Appointments

PersNo: 10159 Terrance R Jones

UNMC Active

PEDIATRICS REG MGR PROF SALARY

Chngd: 03/21/2013 MUSER60

From: 03/15/2013 to: 12/31/9999

Paid Positions

No	Start Date	End Date	Position	Tmod	Pos Desc	Org Unit Des	ESG	Bud Salary	FTE %	D0
1	03/15/2013	12/31/9999	30000051		Coordinator			54,000.00	100.00	
2										
3										
4										
5										
6										
Totals								33,993.00	100.00	

Unpaid Positions

No	Start Date	End Date	Title	Tmod	Org Unit	Org Unit Desc	D0
1							
2							
3							
4							





Employee's active position(s) will default. If the primary position has changed, you will need to type over all of the fields on line 1. If you are adding an additional paid appointment enter the information on line 2. If the additional appointment is unpaid add the information to Line 1 under the Unpaid Position section.




Review previous data for accuracy. If no information has changed skip step 29.

29. As required, complete/review the following fields:

Field Name	R/O/C	Description
Paid Positions		Remember line 1 is the primary appointment.
Start Date	R	Enter date employee was assigned to position. Example: 03/15/2013
End Date	R	Enter date employee's assignment is to end. If end date is unknown, enter 12/31/9999.
Position	R	Enter position number. Example: 30000051
Tmod	C	If appropriate, enter title modifier.

Field Name	R/O/C	Description
Bud Salary	R	Enter budgeted salary for position. Example: 54,000.00
FTE%	R	Enter budgeted FTE percent. Example: 100.00
DO	O	Enter a 2-digit number between 01 and 10 indicating the order in which appointments should be listed in the telephone directory.  If DO fields are left blank, appointments will appear in the telephone directory in the order in which they are listed on the screen.
Unpaid Positions		Unpaid positions do not have relationships in the organizational hierarchy with a specific organizational unit and are not assigned a specific position number. This is to maintain specific information on employees with nonpaying appointments.
Start Date	R	Enter date employee was assigned to position
End Date	R	Enter date employee's assignment is to end. If end date is unknown, enter 12/31/9999.
Title	R	Enter title of position in this free form text field.
Tmod	C	Enter title modifier.
Org Unit	R	Enter organizational unit number associated with unpaid position.
DO	O	Enter a 2-digit number between 01 and 10 indicating the order in which appointments should be listed in the telephone directory.  If DO fields are left blank, appointments will appear in the telephone directory in the order in which they are listed on the screen.

30. Click  (Enter). Message '**Record valid from mm/dd/yyyy to 12/31/9999 delimited at end**' appears.

31. Click  (Enter). If information entered is complete, message '**Save your entries**' appears on the message bar at the bottom of the screen.

32. Click  (Save).

Create 0006 Addresses – Work Address

PersNo 10159 Terrance R Jones

UNMC Active

PEDIATRICS REG MGR PROF SALARY

Start 03/15/2013 to 12/31/9999

Address

Address type WA Work Address

Care Of

Address line 1 ITS

Address line 2 1041

City/county UNMC

State/zip code NE Nebraska 68198-7500

Country Key US USA

Telephone Number 402 559-4785

Type	fax1	Number	402 559-3585	Exte	
Type		Number		Exte	
Type		Number		Exte	
Type		Number		Exte	


Email address


33. As required, complete/review the following fields:




Review previous data for accuracy. If no information has changed, click (Next Record). If data has changed, complete appropriate fields listed below.

Field Name	R/O/C	Description
Address type		Defaults to Work Address – make any changes that are necessary. This is where employees will receive campus mail.
Address line 1	R	Enter/edit campus building of employee’s work address as formatted by your campus. Example: ITS
Address line 2	R	Enter/edit room number within campus building of employee’s work address or use as defined by your campus. Example: 1041

Field Name	R/O/C	Description
City	R	Enter/edit campus acronym UNMC. Example: UNMC
County	C	Leave blank.
State	R	Enter/edit state of employee's work address.
Zip Code	R	Enter/edit zip code of employee's work address. Example: 68198-7500
Telephone number	R	Enter/edit area code and 7-digit phone number of employee's work address. Example: 402-559-4785
Type	O	Enter/edit employee's other communication information, such as a fax number.
Number	O	Enter/edit phone number associated with other communication information. Example: 402-559-3585
Exte (Extension)	C	Enter phone number extension or leave blank.
Email address	C	 Work address email is not updateable, it is display only.

34. Click  (Enter). Message '**Record valid from mm/dd/yyyy to 12/31/9999 delimited at end**' appears.

35. Click  (Enter). If information entered is complete, message '**Save your entries**' appears on the message bar at the bottom of the screen.

36. Click  (Save).

Change 0041 Date Specifications

Change 0041 Date Specifications

PersNo 10159 Terrance R Jones
 UNMC Active
 PEDIATRICS REG MGR PROF SALARY
 Start 09/10/1999 to 12/31/9999 Chng 09/11/1999 WINDRUN5

Date type	Date	Date type	Date
01 Leave Accrual Date	09/10/1999	40 First working day	09/10/1999
I9 I-9 Date	09/10/1999	UD Univ. Service Date	09/10/1999

37. As required, complete/review the following fields:



Screen defaults with date types completed during hiring. If no information has changed, click (Next Record). If data has changed, complete appropriate fields listed below.




Click (Search) to search for/select appropriate field value when available.

Field Name	R/O/C	Description
Date type	R	Defines meaning of particular date. Edit/enter changes. If employee is changing from REGULAR to TEMP please remove the Leave Accrual Date and Univ. Service Date. If employee is changing from TEMP to REGULAR please add the Leave Accrual Date and Univ. Service Date with the same date as the action.
Date	R	Enter appropriate date for each date type.

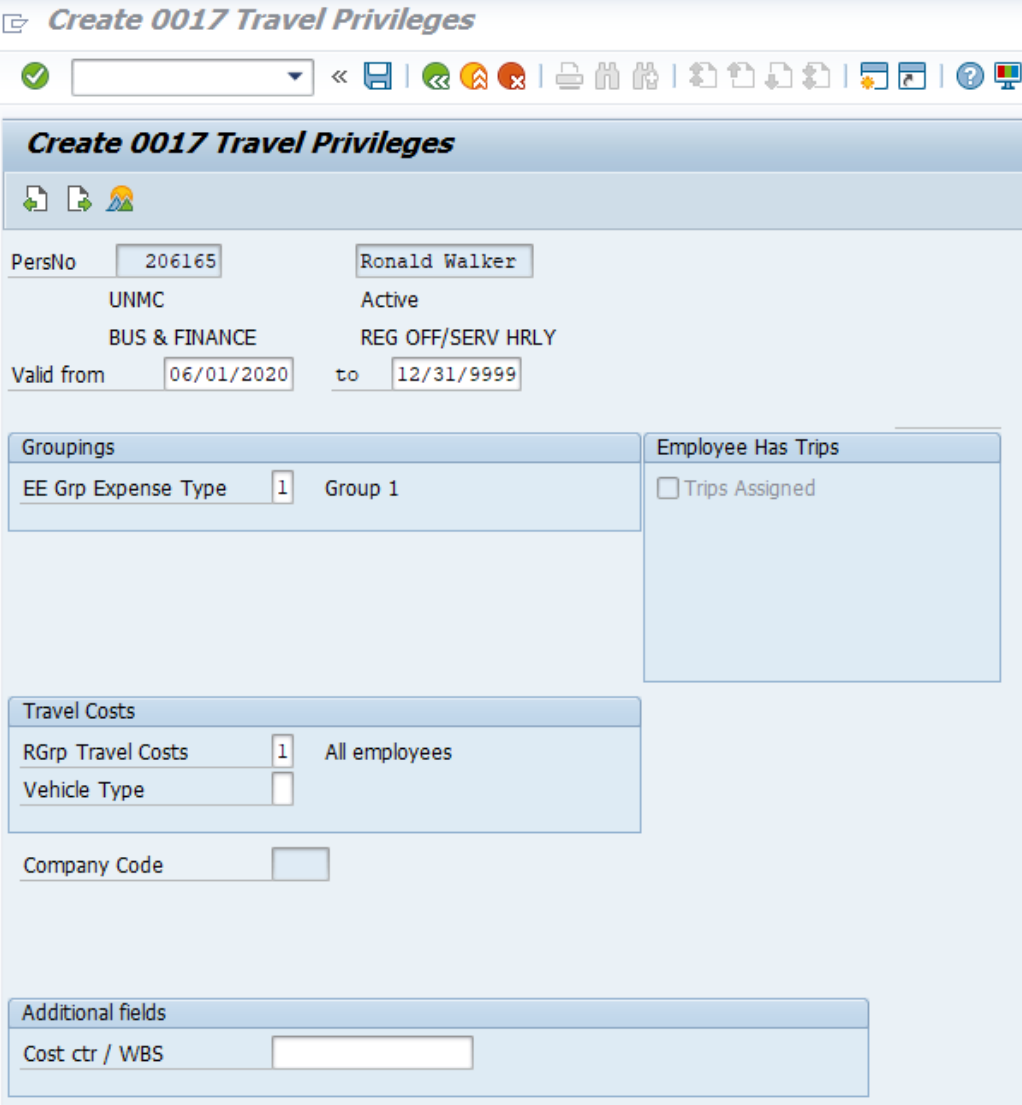


You will receive the message **'Record valid from mm/dd/yyyy to 12/31/9999 delimited at end'** if you made changes to this screen. Click (Enter).

38. Click  (Enter). If information entered is complete, message 'Save your entries' appears on the message bar at the bottom of the screen.

39. Click  (Save).

Create 0017 Travel Privileges



Create 0017 Travel Privileges

PersNo: 206165 Ronald Walker

UNMC Active

BUS & FINANCE REG OFF/SERV HRLY

Valid from: 06/01/2020 to: 12/31/9999

Groupings

EE Grp Expense Type: 1 Group 1

Employee Has Trips

Trips Assigned

Travel Costs

RGrp Travel Costs: 1 All employees

Vehicle Type:

Company Code:




Additional fields

Cost ctr / WBS:

40. As required, complete/review the following fields:

Field Name	R/O/C	Description
Vehicle Type	R	Enter employee's vehicle type as C for Car.
Cost ctr / WBS	R	Enter the department travel cost center.

41. Click  (Enter). Message 'Record valid from mm/dd/yyyy to 12/31/9999 delimited at end' appears.

42. Click  (Enter). If information entered is complete, message **'Save your entries'** appears on the message bar at the bottom of the screen.
43. Click  (Save), message **'Enter a true account assignment relevant to cost accounting'** appears on the message bar at the bottom of the screen.
44. Click  (Enter) and you will be returned to the Personnel Actions screen.
45. You have completed this transaction.
46. Now scan your documents to the employee's ADIS record and assign them to the appropriate template, please see instruction guides under the "Appendix D ADIS Handbook" located in the HR SAP Resource Guide.