

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

**Trigger:** There is a need to process a Career Progression for one of the reasons listed in the Business Process Procedure Overview section.

# **Business Process Procedure Overview:**

**Career Progression** – Pay factors support a salary adjustment and/or competency level adjustment within the pay range of the employee's career-banded class, in conjunction with the employee's attainment and demonstrated use of competencies in same position.

**02 - CP-Comp/Skill** - Pay factors support a salary adjustment within the pay range of the employee's careerbanded class competency level, in conjunction with the employee's attainment and demonstrated use of competencies in the same position at the same overall competency level. The employee's overall competency level will not change. (If salary adjustment is not granted due to funding issues, an action is not processed.)

**05 - CP-Labor Market** – An employee's salary is low in relation to market guidelines applicable to the employee's competencies, and a salary adjustment is in order. Such a situation could be due to: an adjustment in the banded class market rates in conjunction with a labor market study; implementation of a market reference rate with the agency/university; insufficient funding at time of career banding implementation to pay employee at appropriate rate; removal of an internal equity/pay alignment issue that had prevented an employee from being paid at appropriate competency rate.

**06 - CP-Comp Level Change** – Employee's overall competency level is changing as a result of the employee's attainment/assignment and demonstrated use of competencies at a higher or lower overall competency level within the same banded class. The pay factors may support an increase, decrease, or no change in salary. (Note: change in overall competency level that results from disciplinary action shall be coded as a Demotion.)

**08 - Broad Band Level Change** – a change in the level to which an employee is assigned. (Used for pilot banded employees.)

**10 - Broad Band Job Change** – Transfer of an employee from one banded occupational group to another banded occupational area--may or may not involve position number and salary change. Object ID must change. If salary change is involved, include in the comment, reason for the adjustment and justification for any increase exceeding 10%. (Used for pilot banded employees.)

**11 - Salary Adjustment Fund** – A salary increase, provided through approved use of salary adjustment funds, granted to career-banded employees whose salary upon transfer from the graded system to the banded system is less than allowed by the career-banding salary administration policy (Requires OSHR approval).

**03 - Temporary Comp/Skill** - Salary adjustment within the pay range of the employee's career-banded class, in conjunction with the employee's temporary assignment of higher-level competencies in the same position. Overall competency level may or may not change. NOTE: Additional competencies are not the result of "acting pay or acting promotion."

**NOTE:** The "N/A Grade Band Transfer" reason is no longer an option for Career Progression action. Please refer to the Transfer action BPP.

# Tips and Tricks:

Prior to initiating any workflow, ensure the data being used is valid and appropriate.

# Access Transaction:

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

Via Transaction Code: ZPAA076; SWBP; PA40



# 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 Solution.

<b>i</b> Information	<ul> <li>You may want to enter this transaction code in your Favorites folder.</li> <li>Choose Favorites &gt; Insert Favorites</li> <li>Type in ZPAA076</li> </ul>			
	Click Enter.			
	To see the transaction code displayed in front of the link in your favorite			
	Choose Edit > Settings			
	<ul> <li>Place a check next to Display Technical Name</li> </ul>			

Click Enter

Employee Action Request			
D 🖉 🛠 🛅			
Existing PCR No.	D		
Personnel No.	30000489 Wanda Hill		
Last 4 digits (SSN)	First Last		
Effective on 6	99/01/2011		
Action Type Z	ZH Career Progression (NC)		
Reason	32 CP-Comp/Skill		

3. Update the following fields:

Field Name	Description	Values
Personnel No.	Unique employee identifier	Enter value in Personnel No.
		Example: 80000489
Effective on	The date on which the action will be effective	Enter value in Effective on.
		Example: 09/01/2011
Action Type	An action is a grouping of activities to perform a specific task. The action will	Enter value in Action Type.
	prompt you for the Infotypes required to complete the task.	Example: ZH
Reason	Reason for the action, such as CP- Comp/Skill	Enter value in Reason.
		Example: 02

4. Click the Enter Solution.

Enter the Personnel Number of the individual to receive the Career Progression. Click **Enter** to retrieve the name of the individual and verify you have the correct Personnel Number.

If you need to look up the personnel number, click your cursor in the field and click on the matchcode search button to the right of the field for search options.

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

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

Employee Action Requ	iest
🗋 🖉 🛠 🛍	
Existing PCR No.	
Personnel No.	80000489 Wanda Hill
Last 4 digits (SSN)	First Last
Effective on	09/01/2011
Action Type	ZH Career Progression (NC)
Reason	02 CP-Comp/Skill

Click Enter and 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.

Employee Action Request	
Initiate WF	
PCR Number Personnel Number 80000489 Wanda Hill Last 4 digits(SSN) Effective on 09/01/2011 Chng	Action: ZH Career Progression (NC) Reason: 02 CP-Comp/Skill St :
CURRENT         Pers.Area       4601       Cultural Resources       Pri         Subarea       NC01       7 day Norm       State         EE       Group       A       SPA Employees       El         EE       Subgroup       A1       FT N-FLSAOT Perm       El         Org. Unit       20013161       CR CDS It       O       Job       30005025         Networking Analyst       Jot       El       Primation Security Officer       El	PROPOSEDers.Area4601Cultural ResourcesubareaNC017day NormE GroupASPA EmployeesE SubgrpA1FT N-FLSAOT Permrrg. Unit20013161CR CDS Itob30005025Networking AnalystE Position65001391Information Security Officer
Basic Pay	
Pay Scale type     02     Banded     Pay       Pay Scale Area     06     Career Banding     Pay       Pay Scale Group     30005025     Level     C	ay Scale type 02 Banded ay Scale Area 06 Career Banding ay Scale Group 30005025 Level C
Annual Salary 40,525.00 Hrly Sal 0.00 Ar Mkt Index 74.80 Ml Ma	nnual Salary     42,551.00     Hourly Salary       kt     Index     78.54     5.00       in     41,614.00       ax     96,174.00     Next Inc Date
Dates	
	Last day worked

6. Update the following fields:

Field Name	Description	Values
Annual Salary	Employee's annual basic pay	Enter value in Annual Salary.
		Example: 42,551

7. Click the Enter Solution.

Enter the new position number and the new **annual salary** or **hourly rate**. Click **Enter** to validate the data. If the employee is hourly, leave the annual salary field blank and only complete the hourly salary field.

8. Click the Save (Ctrl+S) 📕 button.

Click Save to save the data and receive a PCR number. The PCR has not been submitted to workflow yet.

🔄 in	nformation	×
0	PCR 1000005277 saved	
		✓ ②

9. Click the (Enter) 🗹 button.

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.

👦 🗾 Employee Action Request			
<u>C</u> reate	►	<u>C</u> reate Attachment	
<u>A</u> ttachment list		<u>C</u> reate note	
<u>P</u> rivate note		Create external document (URL)	
<u>S</u> end	►	Store business document	
<u>R</u> elationships		Enter Bar Code	
<u>W</u> orkflow	•	Chng 08/04/11 ZW	
My Objects	►		
Help for object services			
	Employee Action <u>Create</u> <u>Attachment list     Private note     <u>S</u>end     <u>Relationships     W</u>orkflow     <u>My</u> Objects     <u>H</u>elp for object services </u>		

- 10. Click the Services for Objects 😥 button.
- 11. Click Create... >> Create note.
- 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

🔄 Create note	×
Title of note	Career Progression
Enter information as appro	priate to support the Career Progression action for this individual.
	✓ ×

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.
		<b>Example</b> : Career Progression information
Long text	An open text field	Enter value in Long text.
		Example: appropriate information

14. Click the (Enter) 🗹 button.

👼 🖬 Employee Action Request	
Initiate WF	
PCR Number         1000005277           Personnel Number         80000489 Wanda Hill         Action:         ZH           Last 4 digits(SSN)         Reason:         02           Effective on         09/01/2011         Chng 09/01/11         ZWFIN0MPA031         St:         D	Career Progression (NC) CP-Comp/Skill Created
CURRENT       PROPOSED         Pers.Area       4601       Cultural Resources       Pers.Area       4601       Cultural I         Subarea       NC01       7day Norm       Subarea       NC01       7day Nor         EE       Group       A       SPA Employees       EE       Group       A       SPA Employees         EE       Subgroup       A1       FT N-FLSAOT Perm       EE Subgrop       A1       FT N-FLS         Org. Unit       20013161       CR CDS It       Org. Unit       20013161       CR CD CD         Job       30005025       Networking Analyst       Job       30005025       Network         EE       Position       65001391       Information Security Officer       EE       Position       65001391       Information Security Officer	Resources rm ployees SAOT Perm S It king Analyst ation Security Officer
Basic Pay	
Pay Scale type       02       Banded       Pay Scale type       02       Banded         Pay Scale Area       06       Career Banding       Pay Scale Area       06       Career Band         Pay Scale Group       30005025       Level       C       Pay Scale Group       30005025       L	ling .evel C
Annual Salary         40,525.00         Hrly Sal         0.00         Annual Salary         42,551.00           Mkt Index         74.80         Mkt Index         78.54         5.00           Min         41,614.00         Max         96,174.00	Hourly Salary
Dates	
Last day worked	

- 15. Click the Enter 🥙 button.
- 16. Click the Save (Ctrl+S) 🖳 button.
- 17. Click the **Initiate WF** button.

Select the **Initiate Workflow** button to send the Career Progression 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.

<b>P</b>	Employee Action	Request
🗋 🥖	Se 🗊	
	Existing PCR No.	
	Personnel No.	
	Last 4 digits (SSN)	First Last
	Effective on	09/01/2011
	Action Type	Career Progression (NC)
	Reason	CP-Comp/Skill

- 19. Click the Back (F3) Solution.
- 20. The Initiate Career Progression Action is complete.

After Workflow Approvals have been received, process with the Complete Career Progression Action process.

# Instructions for Completing The Action

# Access Transaction:

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

# Via Transaction Code: SBWP



# 21. Click the SAP Business Workplace (Ctrl+F12) 🔯 button.

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

#### **Business Workplace of Workflow Initiator**

🐯 New message 🕅 Find folder 🕅 Find document	Appointment calendar 📓 Distribution lists
Vorkplace: Workflow Initiator	
V 🖓 Inbox	Business Workplass
Unread Documents 0	Busiliess workplace
Documents 0	
Workflow 1	
Overdue entries 0	
Deadline Messages 0	
Incorrect entries 0	
P to Outhox	
D Resubmission	
b A Private folders	
b A Shared folders	
<ul> <li>Site of the second secon</li></ul>	
Polders subscribed to Track	
I Irash	
Shared trash	

#### 22. Select Inbox >> Workflow.

You can process using step 22 or step 23.



23. Select the PCR <sup>4601</sup> Create PA Action - Career Progression (NC) for Wanda Hill - PCR: 1000005277 row.

Double-click on row.

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

A list of your approved (or rejected) PCRs are listed on the right side of the screen. Select the PCR to be processed and click Execute (or double-click the PCR). You can view the PCR details and/or Workflow Tracker details prior to executing the PCR if desired. Once executing the PCR, the Career Progression action will be launched.

Personnel Actions					
•					
<ul> <li>◆ ◆ ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ●</li></ul>	Personnel no. 80000489 Name Wanda Hill EEGroup A SPA Employees EESubgroup A1 FT N-FLSAOT Perm From 89/01/2011	PersA 46 CostC 46	01 Cultural 99999999	Resources CULTURE F	ESOUR
	Personnel Actions				
	Action Type	Personn	. EE group	EE subg	
	New Hire (NC)				*
	Promotion (NC)				-
	Reinstatement/Reemployment(NC)				#
	Leave of Absence (NC)				
	Quick Entry (NC)				
	Investigatory W/Pay (NC)				
	Suspension (NC)				
	Non-Beacon to Beacon(NC)				
	Transfer (NC)				
	Appointment Change (NC)				
	Reallocation (NC)				
	Demotion (NC)				
	Salary Adjustment (NC)				
	Cancel Salary Adjustment(NC)				
	Range Revision (NC)				
	SeparationPayContinuation(NC)				
	Separation (NC)				
	Career Progression (NC)				
	Band Revision (NC)				

# 25. Update the following field:

Field Name	Description	Values			
From	Effective date of the personnel action	Enter value in From.			
		Example: 09/01/2011			

# 26. Highlight Career Progression (NC) action type.

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

The effective date is the date the Career Progression will go into effect. This date must match the effective date on the PCR.

Copy Actions (0000)								
🖓 🖻 🤗 De Evecute info group								
Pers.No. 80000489								
Name Wanda Hill								
EEGroup A SPA Employees PersA 4601 Cultural Resources								
EESubgroup A1 FT N-FLSAOT Perm								
Start 0970172011 🗇 to 12/31/9999								
Personnel action								
Action Type ZH Career Progression (NC)								
Reason for Action 02 CP-Comp/Skill								
Status								
Customer-specific								
Employment 3 Active	3 Active							
Special payment 1 Standard Wage type								
Organizational assignment								
Position 65001391 Information Security Offi								
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								
	<b>^</b>							

# 28. Click the Enter 🤷 button.

🔥 Record valid from 01/01/2008 to 12/31/9999 delimited at end

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.

🛕 Person and position have different employee groups/subgroups

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

Infotype Text
xof øg he es
Enter or paste appropriate comments.

29. Click Edit, >> Maintain text.

To add your comment based on agency or OSHR Policy/Guidelines. Remember you can cut and paste from the PCR.

- 30. Click the Enter Solution.
- 31. Click the Save (Ctrl+S) 📕 button.

Create Organizational Assignment (0001)
🔂 🗟 🤽   Org Structure
Personnel No80000489NameWanda HillEEGroupASPA EmployeesPersA4601Cultural ResourcesEESubgroupA1FT N-FLSAOT PermStatuActiveStart09/01/2011to12/31/9999
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         60000000000000000         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 65001391 800904000718
Information Security O
Job key 30005025 Net Ing Ani
Networking Analyst
Org. Unit 20013161 48010201200
CR CDS It Org.key 46014699999999

32. Click the Enter 🥙 button.

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

The system will display a yellow warning message informing you the existing record will be delimited. Click **Save** to move past this warning message.

33. Click the Save (Ctrl+S) 📕 button.

Copy Planned Wor	king Tir	ne (0007)					
🔓 📑 🔊 🖬 Work schedule							
Personnel No		Name	Service Stillers				
EEGroup A SPA Employ	vees	PersA	4601 Natural and Cu	ltural Resources			
EESubgroup A1 FT N-FLSAG	OT Perm	Statu	Active				
Start Ol MacAdeon	То	12/31/9999	Chg.	mix pe			
Work schedule rule							
Work schedule rule	D01N08GN	MTWHF-8,SaS-	0	WSR Finder			
Time Mgmt status	1 - Positive	Time Recording		*			
Working week	Wk - Sun (n	ndnt) - 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							

34. 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 and verify the working hours are less than 40.

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



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

35. Click the Save (Ctrl+S) 🕒 button.

Notice that when you change the details on the working time infotype, the system reminds you to also manage IT0008, Basic Pay.

<u>A</u> #	⚠ Attention: Please check Basic Pay infotype (0008)						
36. Click the <b>Enter </b> button 37. Click the <b>Save (Ctrl+S)</b>	button.						
	🔄 Possible subseq	Jent activi 🛛 🗶					
	Enrolled on	09/01/2011					
	Terminated on O Automatic Plans O Default Plans O All plans	08/31/2011					
	Add. functions O Plan overview O Enrollment Form O Particip. Monitor	09/01/2011					
		<ul><li>✓ ×</li></ul>					

Subsequent activities should only be completed if the Career Progression action is assigning the employee 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) 🐱 button.

If you do not need to make changes to the benefits of the individual, click **Cancel** to bypass this infotype.

Create Basic Pay (0008)											
🗟 🗟 🚵 🗌 Salary amount 🛛 🛗 Payments and deductions											
Personnel No     80000489     Name     Wanda Hill       EEGroup     A     SPA Employees     PersA     4601     Cultural Resources       EESubgroup     A1     FT N-FLSAOT Perm     Statu     Active       Start     09/01/2011     to     12/31/9999											
Salary	lau										
ReasonPHareer ProgressPS type02BandedPS Area06Career BandingPS group30005025Level	ion		ap.util VkHrs/ lext inc nn.sal	.lvl period :. ary		100 173	.00	)   Mi	onthly 42,551.0	0 US	īD
Wa Wage Type Long Text	0	Amount			Cu	ırr	I	Α.,	Number/Unit	Unit	
1000 Regular Salary			3,5	545.92	US	D					
IV 09/01/2011 - 12/31/9999 ◀ ▶ 3,545.92 USD											

# 39. Update the following field:

Field Name	Description	Values
Reason	Reason for the action such as Career Progression	Enter value in Reason.
		Example: ZH

# 40. Click the Enter Solution.

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 Career Progression (ZH), click Enter to validate the data. Notice the Annual Salary field has retrieved the amount submitted via workflow (or the hourly field is appropriated).

If the employee is hourly, you will manually enter the hourly rate in the amount field; hit enter and the annual salary automatically calculates.

41. Click the Save (Ctrl+S) 🔲 button.

Personnel Actions						
Ð						
<ul> <li> ◆ → ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ●</li></ul>	Personnel no.     80000489       Name     Wanda Hill       EEGroup     A       SPA Employees       EESubgroup     A1       From     09/01/2011	PersA 460 CostC 469	1 Cultural 9999999 (	Resources CULTURE R	ESOUR	
	Personnel Actions					
	Action Type	Personn	EE group	EE subg	<b>•••</b>	
	New Hire (NC)				-	
	Promotion (NC)				-	
	Reinstatement/Reemployment(NC)				33	
	Leave of Absence (NC)					
	Quick Entry (NC)					
	Investigatory W/Pay (NC)					
	Suspension (NC)					
	Non-Beacon to Beacon(NC)					
	Transfer (NC)					
	Appointment Change (NC)					
	Reallocation (NC)					
	Demotion (NC)					
	Salary Adjustment (NC)					
	Cancel Salary Adjustment(NC)					
	Range Revision (NC)					
	SeparationPayContinuation(NC)					
	Separation (NC)					
	Career Progression (NC)					
	Band Revision (NC)					

42. Click the Back (F3) 🙆 button.



43. Click the **Complete Item** 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 may complete the PCR in workflow.

Business Workplace of Workflow Initiator				
🐯 New message 🛛 Find folder 🕼 Find document 🖾 Appointm	ent calendar 🛛 🗃 Distribution lists			
<ul> <li>Workplace: Workflow Initiator</li> <li>Inbox</li> <li>Unread Documents 0</li> <li>Documents 0</li> <li>Workflow 0</li> <li>Grouped according to content</li> <li>Grouped according to content type</li> <li>Grouped according to sort key</li> <li>Grouped according to task</li> <li>Overdue entries 0</li> <li>Deadline Messages 0</li> <li>Incorrect entries 0</li> <li>Outbox</li> <li>Resubmission</li> <li>Shared folders</li> <li>Grouped to be be</li></ul>	Workflow 0         Ex Titte			
・ 団 Trash ・ 間 Shared trash				

44. Click the Back (F3) 🗳 button.

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



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

# Additional Resources

Training HELP website: <a href="https://www.osc.nc.gov/state-agency-resources/training/training\_help\_documents">https://www.osc.nc.gov/state-agency-resources/training/training\_help\_documents</a>

#### Change Record

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