



# NON-BEACON TO BEACON ACTION

## PER-73 | TRANSACTION ZPAA076, SWBP, PA40

PA

The purpose of this Business Process Procedure is to explain how to process an action where a person is transferring from a non-Beacon agency to a Beacon agency.

**Trigger:** There is a need to process a Non-Beacon to Beacon action for one of the reasons listed in the Business Process Procedure Overview section.

### Business Process Procedure Overview:

**Non-Beacon to Beacon** – the employee currently is working for a Non-Beacon agency and is transferring without a break in service to a Beacon agency; or employee previously worked for a Non-Beacon agency and is returning after a break in service to a Beacon agency. (Example - NCSU to DOT)

**NOTE:** To verify if employee has a record in Beacon run BI Report BP002 Cross Agency Verification.

### Reasons:

- **01 - Transfer Lateral** - Movement without a break in service to a position assigned to a same salary grade or movement without a break in service between positions from one career-banded class to another with the same journey market rate or movement without a break in service to a position within the same banded class with the same competency level.
- **02 - Transfer Re-assignment** - Movement without a break in service to a position assigned to a lower salary grade or movement without a break in service between positions from one career-banded class to another with a lower journey market rate or movement without a break in service to a position within the same banded class with a lower competency level.
- **03 - Transfer Promotion** - Movement without a break in service to a position assigned to a higher salary grade or movement without a break in service between positions from one career-banded class to another with a higher journey market rate or movement without a break in service to a position within the same banded class with a higher competency level.
- **09 - Grade Band Transfer** - Movement without a break in service between banded and graded classes
- **10 - 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
- **11 - EPA-SPA** - Employee movement between an EPA position and a SPA position or vice versa
- **04 - Return to State within 12 months (same salary grade)** – Graded employee returns to employment after a break in service of less than 12 months to the same salary grade. [NOTE: Not to be used for re-employment from or to Career Banded positions or other non-graded class/pay system.]

- **05 - Return to State within 12 months (higher salary grade)** - Graded employee returns to employment after a break in service of less than 12 months to a higher salary grade. [NOTE: Not to be used for re-employment from or to Career Banded positions or other non-graded class/pay system]
- **06 - Return to State within 12 months (lower salary grade)** - Graded employee returns to employment after a break in service of less than 12 months to a lower salary grade. [NOTE: Not to be used for re-employment from or to Career Banded positions or other non-graded class/pay system.]
- **07 - Return to State within five years** – Graded employee returns to employment after a break in service of more than 12 months but not to exceed five years; or banded or other class/pay system employee returns to employment after a break in service within five years. [NOTE: Check reinstatement of sick leave if eligible.]
- **08 - Return to State after five years** – Employee returns to employment after a break in service of more than five years. (NOTE: Sick leave shall not be reinstated.)

**NOTES:**

- Break-in service is defined as a separation or non-pay status for more than 31 calendar days.
- Also use Non-Beacon to Beacon if a former employee left State employment before his or her agency implemented Beacon (the former employee has a record in PMIS, but does not have any record in Beacon SAP. (Do not use for County Public School System.)
- Make sure to obtain any active leave balances and/or prior State service on the employee. Verify the balances and the creditable service from the previous agency. If you have a dual role as both the HR Master Data Maintainer and the Leave Administrator, use PA30 to create infotype 2013 -Quota corrections for each transferring leave balance (this infotype is not presented during the Non-Beacon to Beacon Action) and IT0552 – Display Time Specification/Employment Period. If your role consists of being the HR Master Data Maintainer only, you must contact the Leave Administrator to ensure that the employee’s leave balances are brought up to date.
- **Important!** If the employee received a pro-rated longevity you need to create an IT02012 / Z033 to document the pro-rated longevity already received so employee doesn't get a full payment when the year is complete. See Longevity Job Aid
- We strongly recommend that you do not execute the action until you have all of the necessary documentation to complete the action (i.e. social security number, permanent address, tax withholdings, etc.

**Tips and Tricks:**

See the *PA BPP Tips and Tricks Job Aid* for a more complete listing of Best Practices and tips & tricks. The job aid is located on the Training Help website.

Prior to starting the Non-Beacon to Beacon process from within workflow, display the position to ensure it is still vacant. You can use transaction code PPOSE or PO13D to display the position.

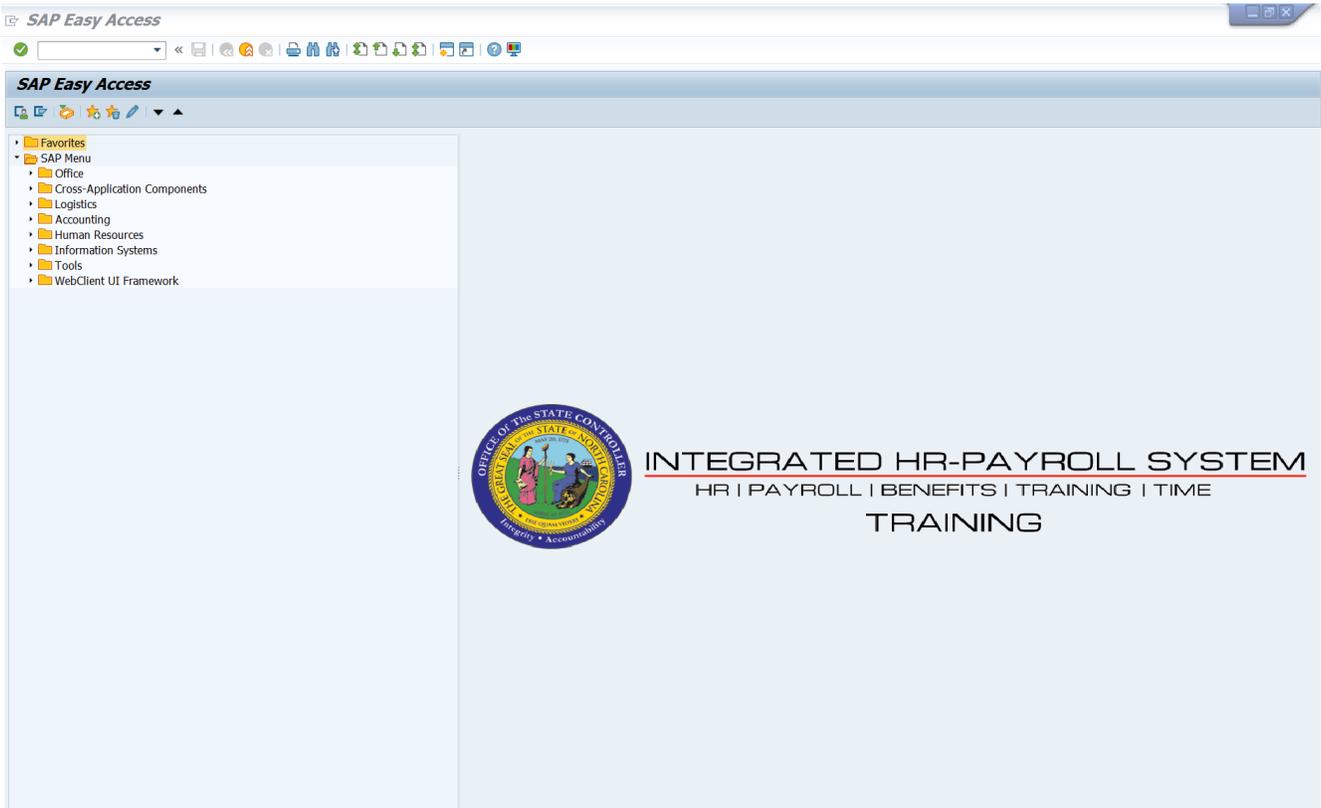
We recommend that you enter the EE Position number first on the Employee Action Request screen and then click Enter to request validation by SAP and the pre-population of many of the fields. If other fields are entered prior to the position number, when the Integrated HR-Payroll System validates the 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; SBWP; PA40

**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.  <b>Example:</b> 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**

Existing PCR No.

Personnel No.

Last 4 digits (SSN)  First  Last

Effective on

Action Type  Non-Beacon to Beacon(NC)

Reason  Transfer Lateral

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).  <b>Example:</b> 5252
First	The employee's first name	Enter value in First.  <b>Example:</b> Macon
Last	The individual's legal last name	Enter value in Last.  <b>Example:</b> Matthews
Effective on	The date on which the action will be effective	Enter value in Effective on.  <b>Example:</b> 08/08/2011
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.  <b>Example:</b> Z7
Reason	Reason for the action, such as Non-Beacon to Beacon	Enter value in Reason.  <b>Example:</b> 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 and Non-Beacon to Beacon actions where the employee does not already have a Personnel Number.

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 all data has been entered, click Enter to validate the data and display the associated text with the data choices made.

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

### Employee Action Request

Initiate WF

PCR Number

Personnel Number  Macon Matthews Action:  Non-Beacon to Beacon(NC)

Last 4 digits(SSN)  Macon  Reason:  Transfer Lateral

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="checkbox"/> 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"/>

#### Dates

Last day worked

\*Fields with V check marks are mandatory.

Information is inherited from the position Personnel Area, Employee Group and Employee Subgroup. If employee information is different, 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.



**Information**

We recommend 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 the EE Position number has been entered, 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, pay scale area, and pay scale group). If you are hiring into a banded position, the position itself will have default values to propose in the compensation area.

### Employee Action Request

Initiate WF

PCR Number

Personnel Number  Macon Matthews      Action:  Non-Beacon to Beacon(NC)

Last 4 digits(SSN)  Macon  Matthews       Reason:  Transfer Lateral

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 Perm
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="52500"/> Hourly Salary <input type="text"/>
	Calc Step - 0 <input type="text" value="0.00"/>
	Min <input type="text" value="38,174.00"/>
	Max <input type="text" value="61,632.00"/> Next Inc Date <input type="text"/>

**Dates**

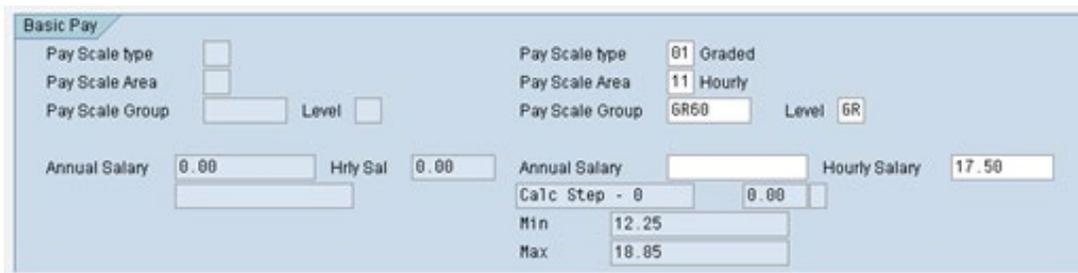
Last day worked

5. Update the following fields:

Field Name	Description	Values
EE Position	New position number assigned to the employee	Enter value in EE Position.  <b>Example:</b> 60083990

Level	Level assigned to the Position or Job	Enter value in Level.  <b>Example:</b> GR
Annual Salary	Employee's annual basic pay	Enter value in Annual Salary.  <b>Example:</b> 52,500.00

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:
- Pay Scale type: 01 Graded
- Pay Scale Area: 11 Hourly
- Pay Scale Group: GR60 Level: 6R
- Annual Salary: 0.00 Hrly Sal: 0.00
- Annual Salary:  Hourly Salary: 17.50
- Calc Step - 0:  0.00
- Min: 12.25
- Max: 18.85

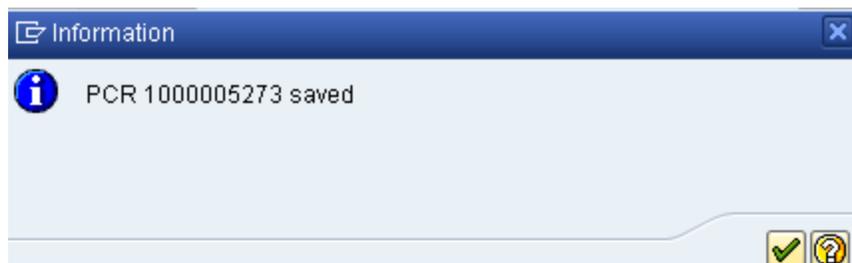
7. Update the following fields: (only if hiring a Temporary employee)

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.  <b>Example:</b> 11
Hourly Salary	The hourly rate	Enter value in Hourly Salary.  <b>Example:</b> 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.

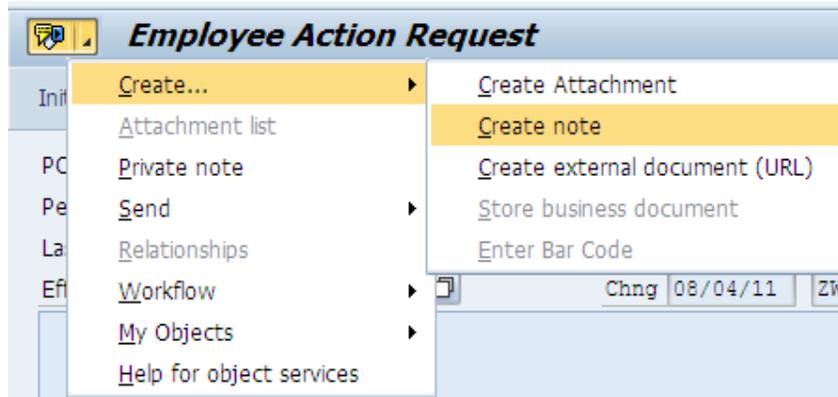


10. Click the **Continue (Enter)**  button.



**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 the PCR has been sent to workflow already, you will not be able to change the details, nor save any new information, only display the existing details.



11. Click the **Services for Objects**  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 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.

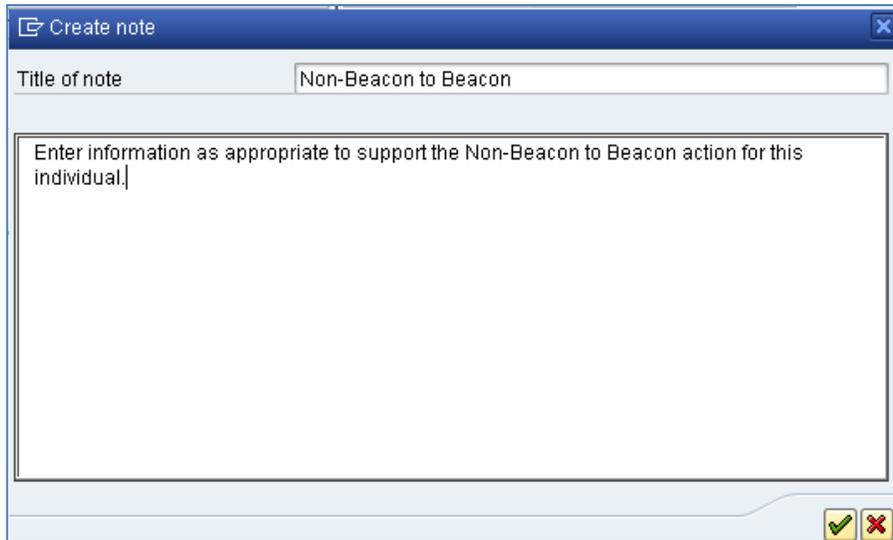
This note and attachment area gets attached to this specific PCR only. It will follow the PCR through the approval/rejection process and live with the PCR into the future. When the PCR has been approved, and you are processing the Action (such as a New Hire action), you will need to recreate any notes or attachments if they need to be attached to the Action record as well.

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**Notes entered during PA Workflow must follow OSHR’s Action Notes Template:**

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

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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> Non-Beacon to Beacon
Long text	An open text field	Enter value in Long text. <b>Example:</b> 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 **Copy (Enter)**  button.

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

**Employee Action Request**

Initiate WF

PCR Number: 1000005273  
 Personnel Number: Macon Matthews  
 Action: 27 Non-Beacon to Beacon(NC)  
 Last 4 digits(SSN): 5252 Macon Matthews  
 Reason: 01 Transfer Lateral  
 Effective on: 08/08/2011 Chng: 08/10/11 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 FTN-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**

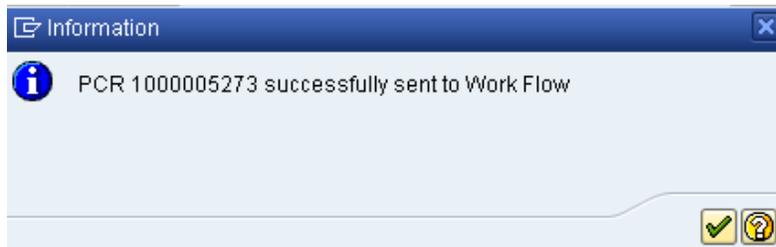
Pay Scale type		Pay Scale type	01 Graded
Pay Scale Area		Pay Scale Area	01 Annual Salaries
Pay Scale Group		Pay Scale Group	GR70 Level GR
Annual Salary	0.00	Annual Salary	52,500.00
Hrly Sal	0.00	Hourly Salary	
		Calc Step - +MP	100.00
		Min	38,174.00
		Max	61,632.00
		Next Inc Date	

**Dates**

Last day worked

16. Click the **Initiate WF**  button.

Select the **Initiate Workflow** button to send the Non-Beacon to Beacon 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).



17. Click the **Continue (Enter)**  button.

18. Click the **Back (F3)**  button.
19. The Initiate Non-Beacon to Beacon Action is complete.
20. After Workflow Approvals have been received, process with the Complete Non-Beacon to Beacon Action process.

### Instructions for Completing the Action

**Access Transaction:**

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

**Via Transaction Code:** SBWP; PA40



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



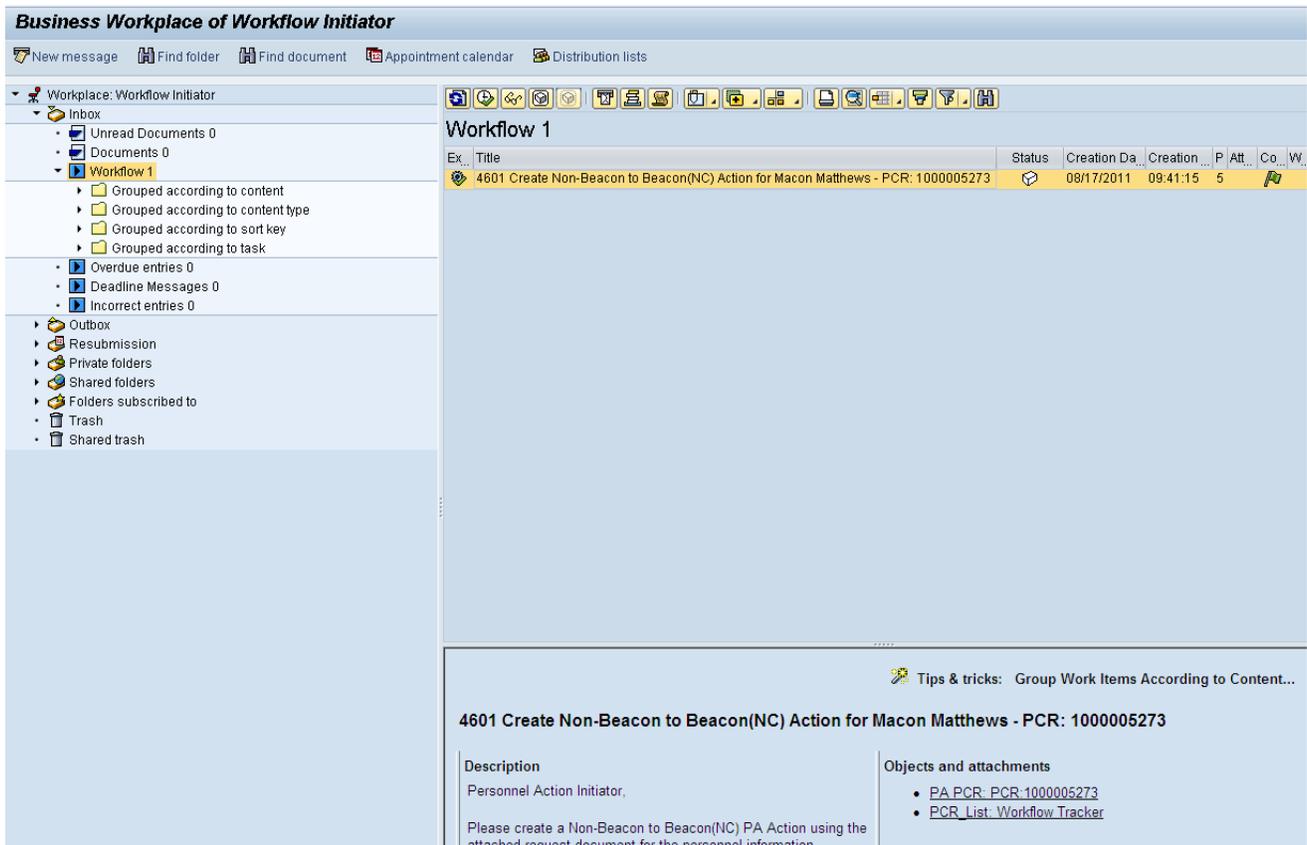
**CRITICAL!**

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



22. Select Inbox >> Workflow.

You can process using step 23 or step 24.



23. Select the PCR **4601 Create Non-Beacon to Beacon(NC) Action for Macon Matthews - PCR: 1000005273** row.
24. Double-click on row.

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 the PCR is executed, the Non-BEACON to BEACON action will be launched.

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

### Hiring Action



Personnel No.

Start Date

Name

Last name

First name

Middle name

HR data

SSN  Gender  Female  Male

Date of Birth

26. Update the following field:

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

27. 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 Non-BEACON to BEACON action.

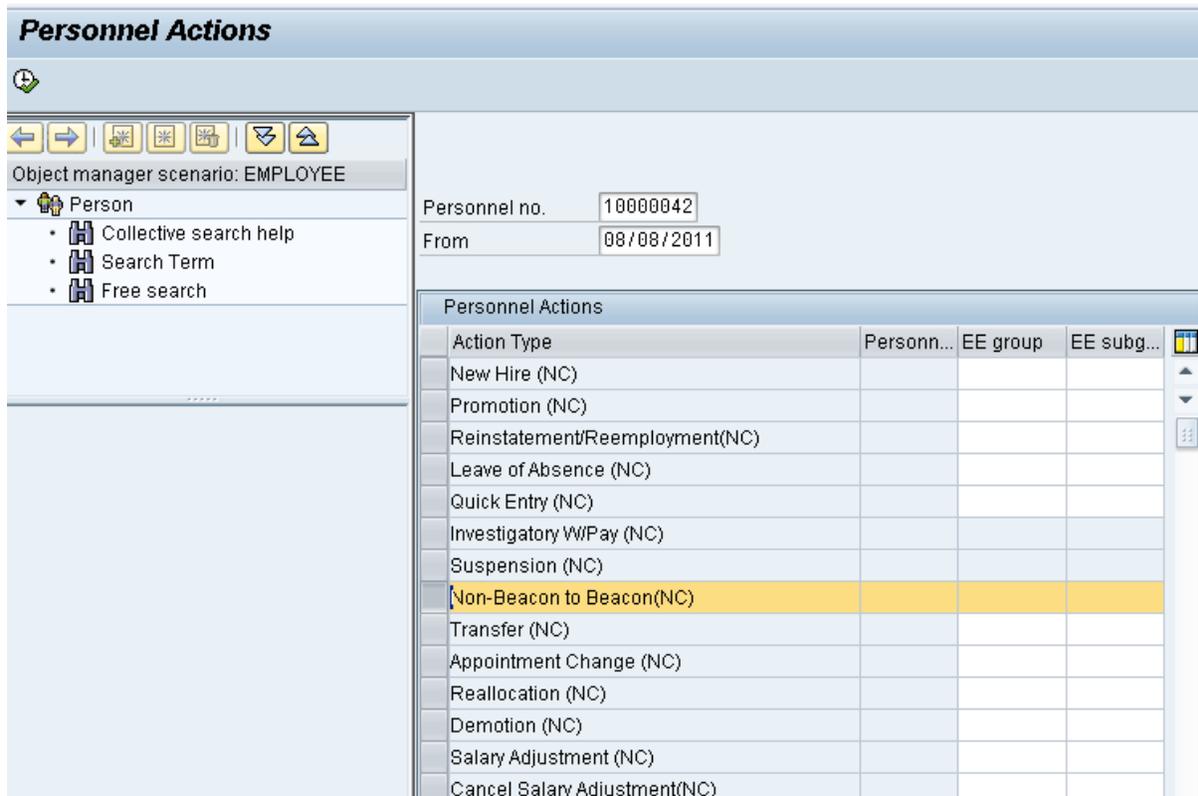
The Start Date is the effective date of the Non-BEACON to BEACON action.

Add the Middle Name - the information entered on this screen will populate IT0002 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.

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



**Personnel Actions**

Object manager scenario: EMPLOYEE

Personnel no. 10000042  
From 08/08/2011

Action Type	Personn...	EE group	EE subg...
New Hire (NC)			
Promotion (NC)			
Reinstatement/Reemployment(NC)			
Leave of Absence (NC)			
Quick Entry (NC)			
Investigatory WPay (NC)			
Suspension (NC)			
<b>Non-Beacon to Beacon(NC)</b>			
Transfer (NC)			
Appointment Change (NC)			
Reallocation (NC)			
Demotion (NC)			
Salary Adjustment (NC)			
Cancel Salary Adjustment(NC)			

29. Update the following field:

Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From. <b>Example:</b> 08/08/2011

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 Non-Beacon to Beacon action, or the date the employee "enters on duty." If the first day of the month falls on a non-workday and the employee starts to work on the first available workday, the effective date would be on the first of the month.

The effective date must match the date on the PCR.



**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.

30. Highlight the **Non-Beacon to Beacon (NC)** action type.

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

### Create Actions (0000)

 Change info group

Pers.No.

Start  to

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**Personnel action**

Action Type  ▼

Reason for Action  Transfer Lateral

Reference Pers. Nos.

---

**Status**

Customer-specific  ▼

Employment  ▼

Special payment  ▼

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**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

32. Click the **Enter**  button.

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 Non-Beacon to Beacon may be probationary, therefore, you would have to change the default Employee Subgroup on the PCR 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 the system will provide a warning message.

 Person and position have different employee groups/subgroups

- 33. Click the **Enter**  button.

**Infotype Text**

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Enter or paste appropriate comments.

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

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

**Create Personal Data (0002)**

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Personnel No

Statu Active

Start  To

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**Name**

Title <input type="text"/>	Name Format <input type="text"/>
Last name <input type="text" value="Matthews"/>	Birth name <input type="text"/>
First name <input type="text" value="Macon"/>	Initials <input type="text"/>
Middle name <input type="text" value="George"/>	Nickname <input type="text"/>
Designation <input type="text"/>	
Suffix <input type="text"/>	
Name <input type="text"/>	

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**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="EN English"/>	
Marital Status <input type="text" value="Single"/>	Dependents <input type="text"/>

- 36. Select the appropriate marital status in the list box.  
Choose the appropriate marital status. If nothing is selected, "Single" will default.
- 37. Update the following field:

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

- 38. 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 person has. If you enter one or more dependents, the system will bring you to a separate screen per dependent to enter their personal information. In this example we will enter 1 dependent.
- 39. Click the **Save (Ctrl+S)**  button.

### Create Family Member/Dependents (0021)





Personnel No

Statu Active

Start  To

Member  Child no

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**Personal data**

Last name <input type="text" value="Matthews"/>	Birth name <input type="text"/>
First name <input type="text" value="Lisa"/>	Initials <input type="text"/>
Title <input type="text"/>	Nationality <input type="text"/>
Gender <input checked="" type="radio"/> Female <input type="radio"/> Male	Ref.Pers.No. <input type="text"/>
Birth date <input type="text" value="01/01/1985"/> 	Telephone number <input type="text"/>
SSN <input type="text"/>	Separation Date <input type="text"/>
Street <input type="text"/>	Marital status <input type="text"/>
Addr Line 2 <input type="text"/>	
City/State <input type="text"/>	
Zip/country <input type="text"/>	

<b>Challenge</b> <input type="checkbox"/> Disability Disability Date <input type="text"/> Learned <input type="text"/>	<b>Status</b> <input type="checkbox"/> Student Indicator
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40. Update the following field:

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

41. Click the **Gender** (Female)  Female radio button.  
Choose Female or Male.

42. Update the following field:

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

43. 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 don't have this information, the employee can complete this data through Employee Self-Service (ESS).

44. 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

45. 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 5 yrs for STD, and the Rehire of Retiree statuses.

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



Delimit Vacancy

S 60083990 Curator Of Furnishings & Decorative Arts

Delimit on

47. 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	<input type="text" value="10000042"/>	Name	<input type="text" value="Macon George Matthews"/>
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"/>
Start	<input type="text" value="08/08/2011"/> to		<input type="text" value="12/31/9999"/>

**Date Specifications**

Date type	Date	Date type	Date
<input type="checkbox"/> 01 Original Hire Date	<input type="text" value="08/08/2011"/>	<input type="checkbox"/> 02 Agency Hire Date	<input type="text" value="08/08/2011"/>
<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"/>

**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	<input type="text"/>	Name	<input type="text"/>
EEGroup	<input type="text" value="A"/> SPA Employees	PersA	<input type="text" value="Health Human Services"/>
EESubgroup	<input type="text" value="A1"/> FT N-FLSAOT Perm	Statu	Active
Start	<input type="text"/>	To	<input type="text" value="12/31/9999"/>

(Not to be used for Supplemental Staff)

**Classification**

Position	<input type="text" value="65002858"/>	800904001427 Facility Survey Consult I
Job	<input type="text" value="30002888"/>	Fac Survey C Facility Survey Consultant I

**Related Work Experience**

Months	<input type="text" value="6"/>	Calculated Months:	<input type="text" value="0"/>
--------	--------------------------------	--------------------	--------------------------------

**Related Education**

Months	<input type="text" value="48"/>
--------	---------------------------------

48. 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

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

### Create Addresses (0006)

Foreign address

Personnel No  Name

EEGroup  SPA Employees PersA  Cultural Resources

EESubgroup  FT N-FLSAOT Prob Statu

Start  to

---

Address

Address type

Care Of

Address line 1

Address line 2

City/county

State/zip code

Country Key

Telephone Number

Communications

Type <input type="text"/>	Number <input type="text"/>	<input type="text"/>	<input type="text"/>
Type <input type="text"/>	Number <input type="text"/>	<input type="text"/>	<input type="text"/>
Type <input type="text"/>	Number <input type="text"/>	<input type="text"/>	<input type="text"/>
Type <input type="text"/>	Number <input type="text"/>	<input type="text"/>	<input type="text"/>

50. Update the following fields:

Field Name	Description	Values
Address line 1	The street number and address	Enter value in Address line 1. <b>Example:</b> 4515 Wilmington St
City/county	The city and county details for the address	Enter value in City/county. <b>Example:</b> Raleigh
City/county	The city and county details for the address	Enter value in City/county. <b>Example:</b> Wake
State/zip code	The state and zip code details for the address	Enter value in State/zip code. <b>Example:</b> NC
State/zip code	The state and zip code details for the address	Enter value in State/zip code. <b>Example:</b> 27611

Telephone Number	The individual's telephone number	Enter value in Telephone Number.  <b>Example:</b> 919
Telephone Number	The individual's telephone number	Enter value in Telephone Number.  <b>Example:</b> 779-5678

51. 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. See the Job Aid for *Address Field Helps and Hints* located on the Training HELP website in the PA > Job Aids folder.

The various communication fields are optional.

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

The permanent residence and/or mailing address are required for Payroll to process. Do not skip this infotype.

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

### Create Residence Tax Area (0207)





Personnel No	10000042	Name	Macon George Matthews
EGroup	A SPA Employees	PersA	4601 Cultural Resources
ESubgroup	A2 FT N-FLSAOT Prob	Statu	Active
Start	08/08/2011	to	12/31/9999

Resident data

Tax area NC State of North Carolina

Tax Authorities in Area

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

53. 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 IT0006 here.

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

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

### Create Work Tax Area (0208)





Personnel No	10000042	Name	Macon George Matthews
EEGroup	A SPA Employees	PersA	4601 Cultural Resources
EESubgroup	A2 FT N-FLSAOT Prob	Statu	Active
Start	08/08/2011 <input type="checkbox"/>	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

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

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

<b>Create Unemployment State (0209)</b>			
Personnel No	10000042	Name	Macon George Matthews
EEGroup	A SPA Employees	PersA	4601 Cultural Resources
EESubgroup	A2 FT N-FLSAOT Prob	Statu	Active
Start	08/08/2011	to	12/31/9999
<b>Unemployment data</b>			
Tax authority	NC	North Carolina	
Worksite	24	Dept of Cultural Resources	

57. 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.

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

**Create Withholding Info W4/W5 US (0210)**

Personnel No 10041414 Name Matthew Lee McKinney

EEGroup A SPA Employees PersA 4601 Natural and Cultural Resources

EESubgroup A1 FT N-FLSAOT Perm Statu Active

Start 01/10/2020 to 12/31/9999

---

**Status**

Tax authority FED Federal Tax level A Federal

Filing Status 03

Use Higher Withholding Rates Schedule

---

**Exemptions**

Credits for dep. USD

Tax Exempt Ind. Not exempt  IRS mandates

Foreign Earned Income

---

**Withholding adjustments**

Add.withholding USD  Non-resident tax calculation

Default formula 01 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

59. 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.



**Information** Federal and State withholdings are required in order for Payroll to process. Do **not** skip this infotype.

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

### Create Withholding Info W4/W5 US (0210)





Personnel No	10041414	Name	Matthew Lee McKinney
EGroup	A SPA Employees	PersA	4601 Natural and Cultural Resources
ESubgroup	A1 FT N-FLSAOT Perm	Statu	Active
Start	01/10/2020	to	12/31/9999

**Status**

Tax authority	NC North Carolina	Tax level	B State
Filing Status	01 		

**Exemptions**

Allowances	<input type="checkbox"/>	Exemption amount	<input type="text"/>	USD
Additional allowance	<input type="checkbox"/>	Additional exemption amount	<input type="text"/>	USD
Personal allowance	<input type="checkbox"/>			
Dependent allowance	<input type="checkbox"/>			
Tax exempt indicator	Not exempt		<input type="checkbox"/>	IRS mandates

**Withholding adjustments**

Add.withholding	<input type="text"/>	USD	Add. percent	<input type="text"/>
Default formula	01 WITHHOLDING FOR		Alternate formula	<input type="text"/>

**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...

61. 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.

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

**Create Addresses (0006)**

Foreign address

Personnel No 10000042 Name Macon George Matthews

EGroup A SPA Employees PersA 4601 Cultural Resources

EESubgroup A2 FT N-FLSAOT Prob Statu Active

Start 08/08/2011 to 12/31/9999

Address

Address type 4 Emergency contact

Care Of Mary Matthews

Address line 1 4515 Wilmington St

Address line 2

City/county Raleigh Wake

State/zip code NC North Carolina 27611

Country Key US USA

Telephone Number 919 576-8978

Communications

Type	Number		

63. Update the following fields:

Field Name	Description	Values
Address line 1	The street number and address	Enter value in Address Line 1. <b>Example:</b> 4515 Wilmington Lane
City/county	The city and county details for the address	Enter value in City/county. <b>Example:</b> Raleigh
City/county	The city and county details for the address	Enter value in City/county. <b>Example:</b> Wake
State/zip code	The state and zip code details for the address	Enter value in State/zip code. <b>Example:</b> NC
State/zip code	The state and zip code details for the address	Enter value in State/zip code. <b>Example:</b> 27611

Telephone Number	The individual's telephone number	Enter value in Telephone Number.  <b>Example:</b> 919
Telephone Number	The individual's telephone number	Enter value in Telephone Number.  <b>Example:</b> 576-8978

- 64. Click the **Enter**  button.
- 65. 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	<input type="text" value="10000042"/>	Name	<input type="text" value="Macon George Matthews"/>
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="08/08/2011"/> <input type="checkbox"/>	to	<input type="text" value="12/31/9999"/>

Address

Address type	<input type="text" value="5 Mailing address"/>		
Care Of	<input type="text"/>		
Address line 1	<input type="text" value="P. O. Box 12"/>		
Address line 2	<input type="text"/>		
City/county	<input type="text" value="Raleigh"/>	<input type="text" value="Wake"/>	
State/zip code	<input type="text" value="NC"/> North Carolina	<input type="text" value="27604"/>	
Country Key	<input type="text" value="US USA"/>		
Telephone Number	<input type="text"/>		

Communications

Type	<input type="text"/>	Number	<input type="text"/>	<input type="text"/>	
Type	<input type="text"/>	Number	<input type="text"/>	<input type="text"/>	
Type	<input type="text"/>	Number	<input type="text"/>	<input type="text"/>	
Type	<input type="text"/>	Number	<input type="text"/>	<input type="text"/>	

66. Update the following fields:

Field Name	Description	Values
Address line 1	The street number and address	Enter value in Address Line 1. <b>Example:</b> P. O. Box 12
City/county	The city and county details for the address	Enter value in City/county. <b>Example:</b> Raleigh
City/county	The city and county details for the address	Enter value in City/county. <b>Example:</b> Wake
State/zip code	The state and zip code details for the address	Enter value in State/zip code. <b>Example:</b> NC
State/zip code	The state and zip code details for the address	Enter value in State/zip code. <b>Example:</b> 27604
Telephone Number	The individual's telephone number	Enter value in Telephone Number. <b>Example:</b> 919
Telephone Number	The individual's telephone number	Enter value in Telephone Number. <b>Example:</b> 707-1158

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.

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).

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

**Create Monitoring of Tasks (0019)**

Personnel No 10000042 Name Macon George Matthews

EEGroup A SPA Employees PersA 4601 Cultural Resources

EESubgroup A2 FT N-FLSAOT Prob Statu Active

Task

Task Type 01 End of probation

Date of Task 02/01/2012 Processing indicator New task

Reminder

Reminder Date 01/01/2012

Lead/follow-up time For specific task type

Comments

End of probation

69. 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. <b>Example:</b> 02/01/2012
Comment	Additional information about an item	Enter value in Comment. <b>Example:</b> End of probation

70. Click the **Enter**  button.

Enter a reminder through the Monitoring of Tasks screen as appropriate.

Insert any notes or comments pertaining to the task. Managers will be able to view reminders in MSS (Manager Self-Service). The HR teams will manage the tasks via the BOBJ Report – B0099 – Employee Deadline Dates.

A common task type would be End of probation.

A 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.

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

### Create I-9 Residence Status (0094)

Personnel No 
Name

EESubgroup  FT N-FLSAOT Prob
PersA  Cultural Resources

Start  

**Personal identification**

Residence status

ID type

Issuing Authority

ID number

Issuing date

Expiry date

**Employment verification**

Work Permit

Issuing Authority

Work permit number

Issuing date

Expiry of WP

72. Update the following fields:

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

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

73. 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 allowing entry of IT0048 information such as Residence Status details (i.e., 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, choose **non-resident alien** on IT0094. IT0048 will display with US01 or US02 as the choices. When you save IT0094 with the non-resident alien choice, IT0048 with Subtype US01 displays. The dynamic action displays IT0048 subtype US01 first, so, if you do not need that subtype, click the YELLOW arrow to bypass that infotype and IT0048 subtype US02 will display.

74. 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  -

75. Update the following field:

Field Name	Description	Values
Telephone	Telephone number	Enter value in Telephone. <b>Example:</b> 919-733-5656

76. Click the **Enter**  button.

This is the employee's work telephone number.

**Copy Planned Working Time (0007)**

Work schedule

Personnel No: [00000000] Name: [MARRIS, DILLON]

EGroup: A SPA Employees PersA: 4601 Natural and Cultural Resources

ESubgroup: A1 FT N-FLSAOT Perm Statu: Active

Start: [01/01/2000] To: 12/31/9999 Chg.: [00111111] [000000]

**Work schedule rule**

Work schedule rule: D01N08GN MTWHF-8,Sa5-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

77. Update the following field:

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

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 Integrated HR-Payroll System team members.

 <b>CRITICAL!</b>	Subject employees must be positive time. Employment percent should always be 100%.
---	--



If the person is Supplemental Staff, manually enter the hourly rate in the amount field and press/click Enter. The annual salary automatically calculates.

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

82. Click the **Continue (Enter)**  button.

The Possible subsequent activities pop-up window appears 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

Select

↑ Pers.No. Name

10000042 Macon George Matthews

80000610 Susan Castro

Enroll

Name Macon George Matthews on 08/08/2011 Overview

Offer selection

Get offer Print form General Notice Error list

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

Offer

83. Click the **Possible offers** column.
84. Highlight the **Automatic Offer** row.
85. Click the **Get offer** button.

**Enrollment**

Direct selection | Selection set

Personnel no.

ID number

Select

↑ Pers.No. Name

10000042 Macon George Matthews

80000610 Susan Castro

Enroll

Name Macon George Matthews on 08/08/2011 Overview

Offer selection

Get offer Print form General Notice Error list

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

Automatic offer

Enroll Costs Undo selection Error List

Plan	Status	Validity period	Activity
Retirement Plan			
• TSERS - Retirement Plan		08/08/2011 - 12/31/9999	✓

86. Click the **Enroll** button.

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



**Enrollment**

Direct selection   Selection set

Personnel no.

ID number

Select

Pers.No.	Name
<a href="#">10000042</a>	<a href="#">Macon George Matthews</a>
<a href="#">80000610</a>	<a href="#">Susan Castro</a>

Enroll

Name  on  Overview

Offer selection

Get offer   Print form   General Notice   Error list

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

Offer

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

Possible subsequent activi...

Enrolled on

Terminated on

Automatic Plans

Default Plans

All plans

Add. functions

Plan overview

Enrollment Form

Particip. Monitor

90. 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.

### Create Bank Details (0009)

Personnel No  Name   
 EEGroup  SPA Employees PersA  Cultural Resources  
 EESubgroup  FT N-FLSAOT Prob Statu   
 Start  to

**Bank details**

Bank details type   
 Payee   
 Postal Code/City    
 Bank Country   
 Bank Key   
 Bank Account  Bank control key   
 Payment method  Payroll Direct Deposit  
 Purpose   
 Payment currency  United States Dollar

91. Click the **Bank Key** matchcode.

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

Find bank

Bank Country

Bank Key

Bank name

City

Bank number

SWIFT code

Bank Branch

House no/street

Restrict Number

92. 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.  <b>Example:</b> Fidelity

93. Click the **Continue (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	2601 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 2200	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

94. Click 063113934.

95. Click the **Copy (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	10000042	Name	Macon George Matthews
EEGroup	A SPA Employees	PersA	4601 Cultural Resources
EESubgroup	A2 FT N-FLSAOT Prob	Statu	Active
Start	08/08/2011 <input type="checkbox"/>	to	12/31/9999

**Bank details**

Bank details type	0 Main bank		
Payee	Macon George Matthews		
Postal Code/City	27611	Raleigh	
Bank Country	US USA		
Bank Key	063113934	FIDELITY BK OF FLORIDA, NA	
Bank Account	5512468	Bank control key	01
Payment method	P Payroll Direct Deposit		
Purpose	<input style="width: 90%;" type="text"/>		
Payment currency	USD United States Dollar		

96. 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.  <b>Example:</b> 5512468
Bank control key	Key to control and identify bank number	Enter value in Bank control key.  <b>Example:</b> 01

97. 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 do not 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	10000042	Name	Macon George Matthews	
EEGroup	A SPA Employees	PersA	4601	Cultural Resources
EESubgroup	A2 FT N-FLSAOT Prob	Statu	Active	
Start	08/08/2011	to	12/31/9999	

**Bank details**

Bank details type	0 Main bank		
Payee	Macon George Matthews		
Postal Code/City	27611	Raleigh	
Bank Country	US USA		
Bank Key	<input type="text"/>		
Bank Account	<input type="text"/>	Bank control key	<input type="checkbox"/>
Payment method	C	Payroll Check	
Purpose	<input type="text"/>		
Payment currency	USD	United States Dollar	

98. 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 Active

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**

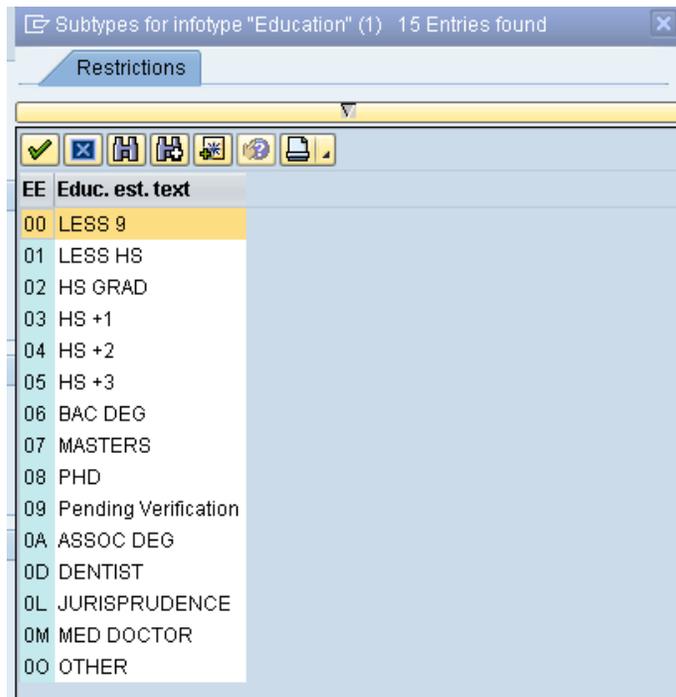
Separated  
 Retired

**State Statute**

Spouse of disable veteran  
 Spouse or surviving dependent of deceased veteran

99. Complete the **Ethnic origin** drop-down list.
100. Complete the **Military status** drop-down list as needed.
101. Click the **Protected Veteran**, **Not a Protected Veteran**, or **Non-veteran** radio button.
102. Complete the **Disability Status** drop-down list.
103. Complete the **Additional Veteran Status** as needed.
104. Complete the **State Statute** as needed.
105. 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.

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



For this example:

107. Click **02**.

108. Click the **Copy (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

EEGroup  SPA Employees PersA  Cultural Resources

EESubgroup  FT N-FLSAOT Prob Statu

Start  to

---

Educational est.  HS GRAD

Institute/location

Verified  HS GRAD

109. Update the following fields:

Field Name	Description	Values
Start	Start date of the specified date range	Enter value <b>Example:</b> 08/01/2003
To	Ending date of the specified date range	Enter value in to. <b>Example:</b> 05/12/2007
Institute/location	Name or location of educational institution that the employee attended	Enter value in Institute/location. <b>Example:</b> 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. <b>Example:</b> 02

110. 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, use a [PA30] transaction to copy this record and change the field to **Verified [07]**.

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

### Create Monitoring of Tasks (0019)

Personnel No	10000042	Name	Macon George Matthews
EESubgroup	A	PersA	4601
	SPA Employees		Cultural Resources
EESubgroup	A2	Statu	Active
	FT N-FLSAOT Prob		

**Task**

Task Type: 05 Credential Verificat

Date of Task:  Processing indicator: New task

**Reminder**

Reminder Date:

Lead/follow-up time:   For specific task type: ▼

**Comments**

112. Update the following fields:

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

113. 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.

114. 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 Ass - Psychological Board	01/01/1900	12/31/9999

For this example:

115. Click **0031**.

116. Click the **Copy (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 type="text"/>	<input checked="" type="checkbox"/>		<input type="text"/>			<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>		<input type="text"/>			<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>		<input type="text"/>			<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>		<input type="text"/>			<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>		<input type="text"/>			<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>		<input type="text"/>			<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>		<input type="text"/>			<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>		<input type="text"/>			<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>		<input type="text"/>			<input type="checkbox"/>

Renewal Code

117. 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.  <b>Example:</b> 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.  <b>Example:</b> 02/16/2012
----------	--	--

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 valid only 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.

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



### Create Objects on Loan (0040)

Personnel No	10000042	Name	Macon George Matthews
EEGroup	A	SPA Employees	PersA <span style="border: 1px solid #ccc;">4601</span> Cultural Resources
EESubgroup	A2	FT N-FLSAOT Prob	Statu Active
Start	08/08/2011	to	12/31/9999

Objects on Loan

Object on loan	01	State ID	
Number/unit	1	Pieces	
Loan object no.	443675		

Comments

Line 1	
Line 2	
Line 3	

119. 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. <b>Example:</b> 01
Number/unit	Enter number/unit of items out on a loan.	Enter value in Number/unit. <b>Example:</b> 1
Number/unit	Enter number/unit of items out on a loan.	Enter value in Number/unit. <b>Example:</b> Pieces
Loan object no.	Identification or reference number of the object (if available)	Enter value in Loan object no. <b>Example:</b> 443675

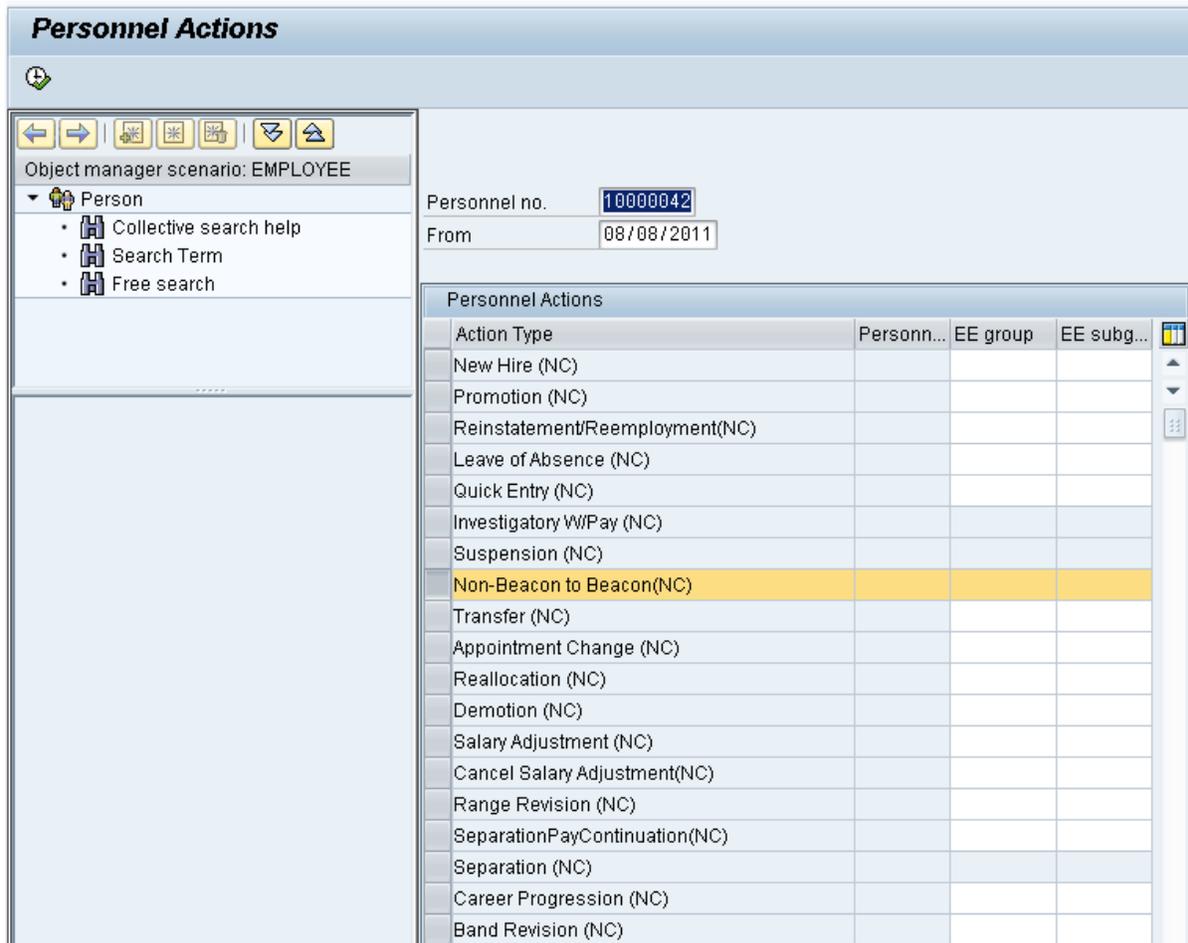
120. Click the **Enter** button.

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

Comments can 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 IT0040.

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



**Personnel Actions**

Object manager scenario: EMPLOYEE

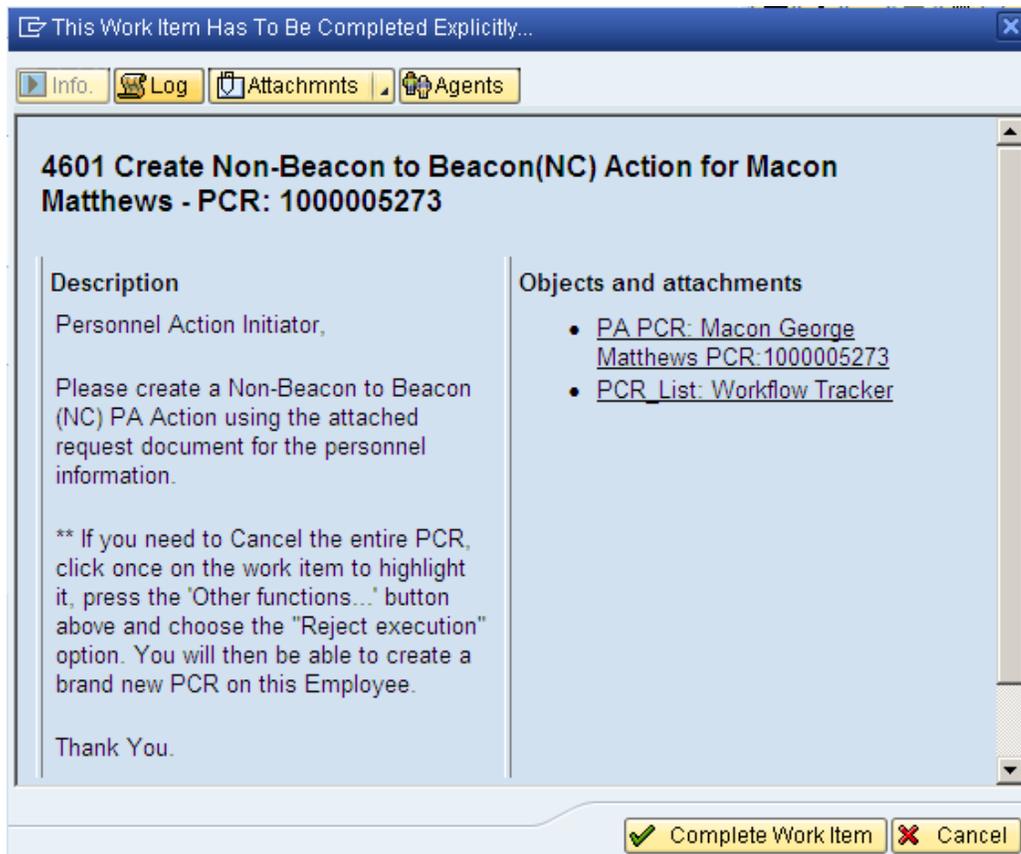
- Person
  - Collective search help
  - Search Term
  - Free search

Personnel no.

From

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)			
<b>Non-Beacon to Beacon(NC)</b>			
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)			

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



123. Click the **Complete Work Item**  button.

Only when 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. You can now complete the PCR in workflow.

**Decision Step in Workflow**

Workflow Create

**4601 Non-Beacon to Beacon(NC) for Employee Macon George Matthews 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 Macon George Matthews ~ Personnel #10000042:  
**Continue PA Action** - taken to transaction PA40 to complete the Non-Beacon to Beacon(NC) Employee's data.  
**PA Action Completed** - Non-Beacon to Beacon(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: Macon George Matthews PCR:1000005273](#)
- [PCR\\_List: Workflow Tracker](#)

124. Click the "PA Action Completed" **PA Action Completed** hyperlink.

**Business Workplace of Workflow Initiator**

New message Find folder Find document Appointment calendar Distribution lists

Workplace: Workflow Initiator

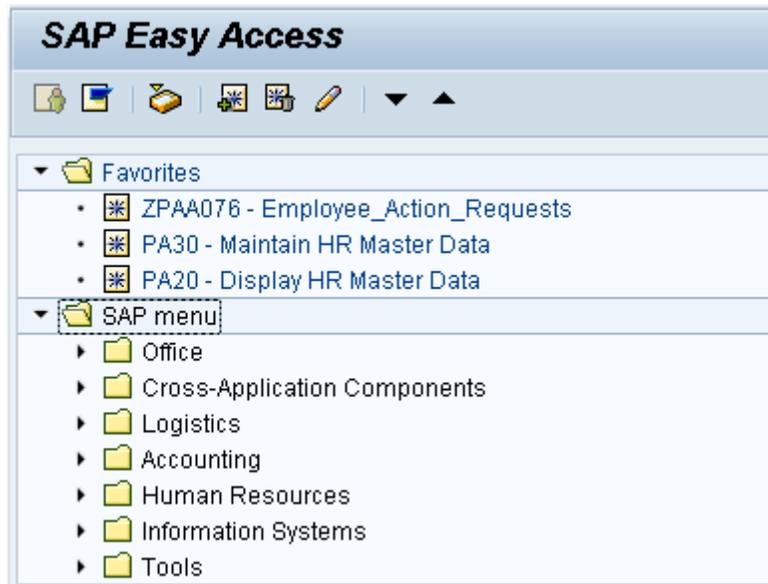
- Inbox
  - Unread Documents 0
  - Documents 0
  - Workflow 0**
    - Grouped according to content
    - Grouped according to content type
    - Grouped according to sort key
    - Grouped according to task
  - Overdue entries 0
  - Deadline Messages 0
  - Incorrect entries 0
- Outbox
- Resubmission
- Private folders
- Shared folders
- Folders subscribed to
- Trash
- Shared trash

**Workflow 0**

Ex..	Title	Status	Creation Da..

125. 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



126. The Non-Beacon to Beacon Action is complete, but the Integrated HR-Payroll System team recommends reviewing via PA20 all infotypes that have been processed.
127. You may need to create additional infotypes if employee is eligible via PA30:
- a) Employee has prior Creditable State service – Create IT0552 Time Specification/Employ Period
  - b) 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](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 (C. MacDonald)

Changes: Removed Date Monitoring Report (S\_PH0\_48000450), replaced it with BOBJ Report – B0099 – Employee Deadline Dates