

Appointment Change Action – After In-Training Appointment

- Purpose** Use this procedure to complete an **appointment change** after an In-training Probationary or In-training Trial Service Appointment has been successful.
- Trigger** Perform this procedure when an employee completes his or her In-training Appointment or completes a level in a multiple level In-training Appointment and there is a change to the appointment date or the basic pay.
- Prerequisites**
- Employee’s In-Training Probationary Appointment has been successfully completed and the employee status has been updated to permanent.
- End User Roles** In order to perform this transaction you must be assigned the following role:
Personnel Administration Processor

Change History	
Date	Change Description
11/30/2012	Updated user procedure to match current system.
5/28/2014	Added updated screen shot and added the description of the fields on the <i>Planned Working Time (0007)</i> .

Menu Path Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions

Transaction Code PA40

Helpful Hints	
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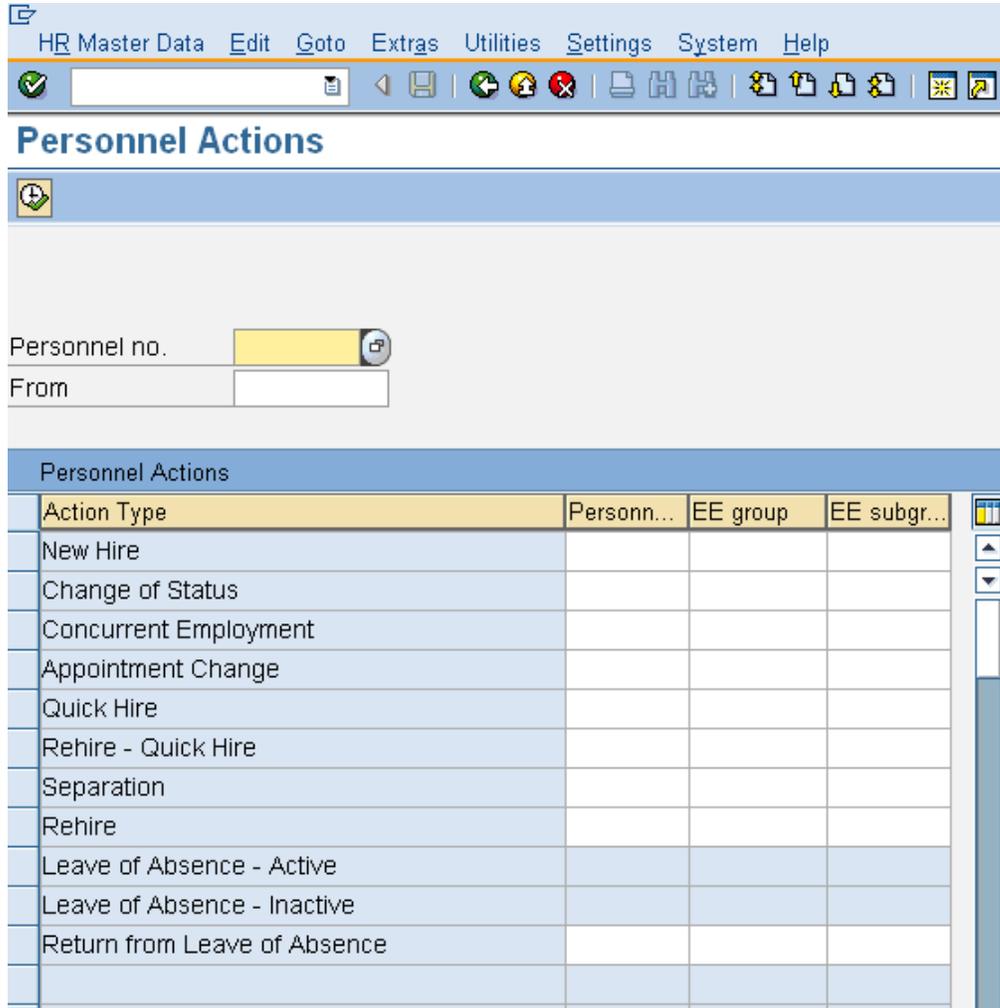
The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
Error 	Example:  Make an entry in all required fields. Action: Fix the problem(s) and then click  (Enter) to validate and proceed.
Warning 	Example:  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. Action: If an action is required, perform the action. Otherwise, click  (Enter) to validate and proceed.

Message Type	Description
Confirmation  or 	Example:  Save your entries. Action: Perform the required action to proceed.

Procedure

1. Start the transaction using the above menu path or transaction code **PA40**.



2. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number. Example: 40000312

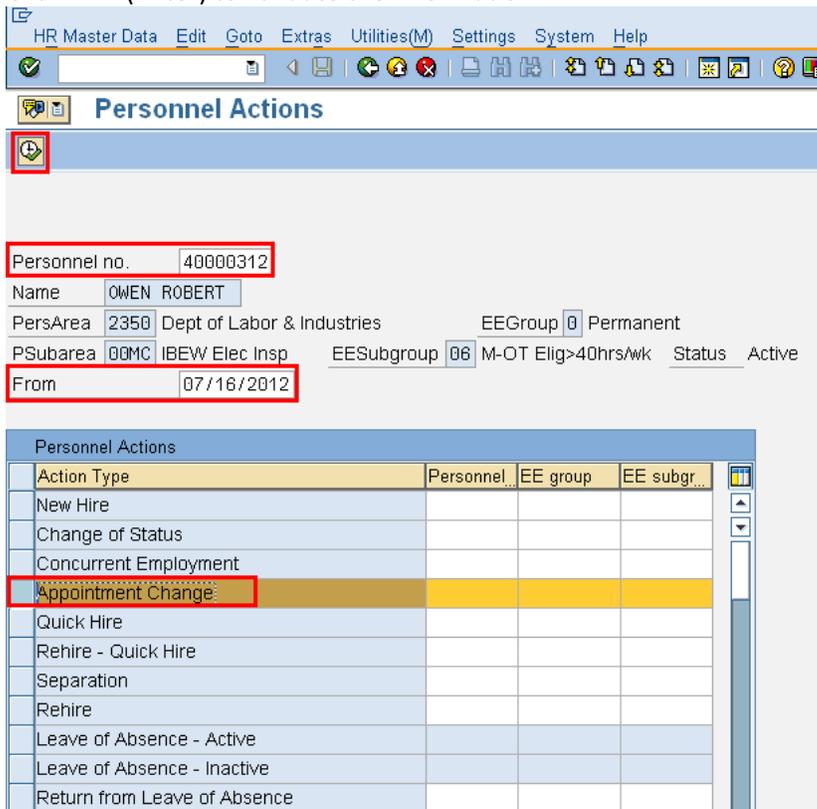
3. Perform one of the following:

IF	Go To
You are the Personnel Administration Processor	Step 4
You are the Payroll Processor	Step 33
You are the Benefits Processor	Step 45

4. Complete the following fields:

From	R	<p>The effective date of the action.</p> <p> Only enter the <i>From</i> date if you are the Personnel Administration Processor initiating the appointment change action.</p> <p>Example: 07/16/2012</p>
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5. Click  (Enter) to validate the information.



HR Master Data Edit Goto Extras Utilities(M) Settings System Help

Personnel Actions

Personnel no. 40000312

Name OWEN ROBERT

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

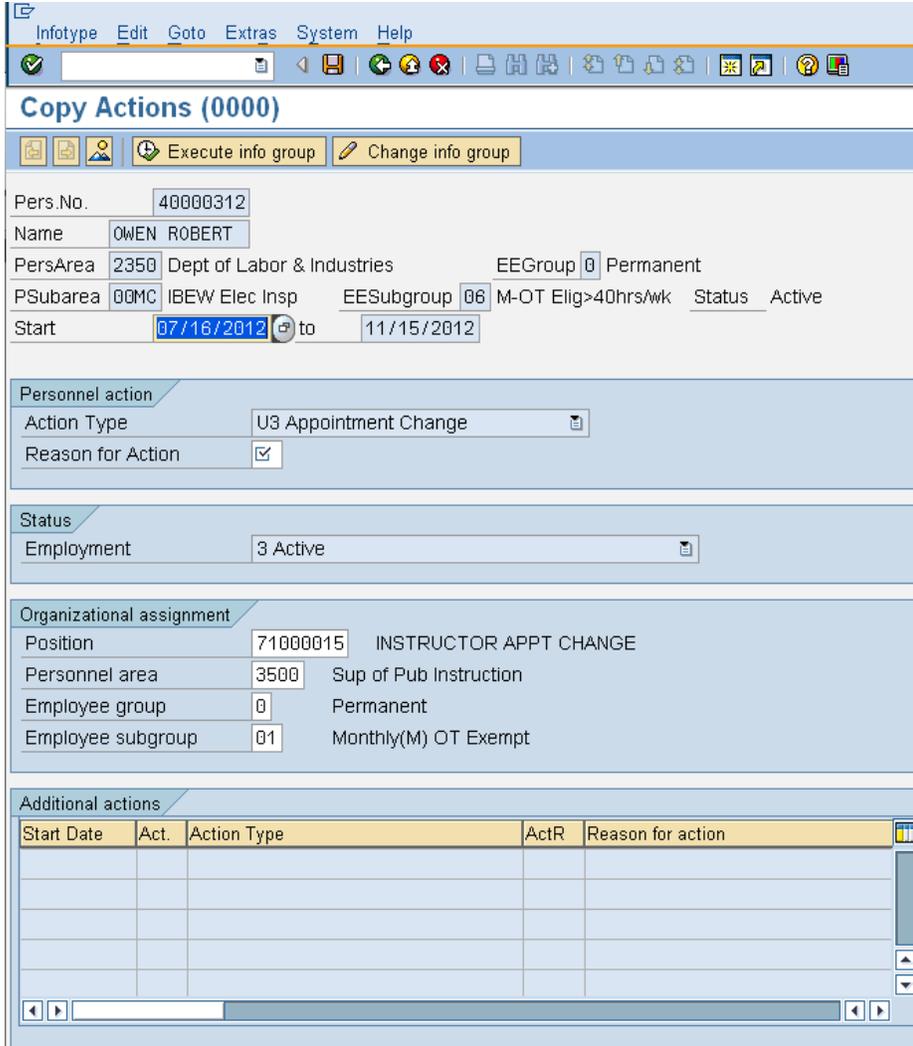
PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elig>40hrs/wk Status Active

From 07/16/2012

Action Type	Personnel	EE group	EE subgr...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change:			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			

6. Click the box to the left of **Appointment Change** to select.

7. Click  (Execute) to execute the action.



Copy Actions (0000)

Execute info group Change info group

Pers.No. 40000312
 Name OWEN ROBERT
 PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent
 PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elig>40hrs/wk Status Active
 Start 07/16/2012 to 11/15/2012

Personnel action
 Action Type U3 Appointment Change
 Reason for Action

Status
 Employment 3 Active

Organizational assignment
 Position 71000015 INSTRUCTOR APPT CHANGE
 Personnel area 3500 Sup of Pub Instruction
 Employee group 0 Permanent
 Employee subgroup 01 Monthly(M) OT Exempt

Start Date	Act.	Action Type	ActR	Reason for action

8. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Reason for Action	R	It stores the reason that an action has been performed.  Click the  (Matchcode) to open the selection list.

Reason for Action (1) 64 Entries found

Restrictions

Action Type: U3
Name of action type: Appointment Change

Ac...	Name of reason for action
01	Promotion
02	ZDNU - Temporary Appt
03	In-Training
04	ZDNU - WMS Acting Apptmt
05	ZDNU - WMS Apptmt With Review
07	WMS
08	Adjust Hours Worked
09	ZDNU - Full-Time Year Round
10	ZDNU - Classified to Exempt
11	In-Training Level - Complete
12	In-Training Series - Complete
13	Demotion - Disciplinary

IF	Then
In-Training Appointment is Complete	Click 11 - In-training Complete
In-Training Appointment has multiple levels	Click 12 In-Training Series- complete

Example: 12 In Training Series Complete

Infotype Edit Goto Extras System Help

Execute info group Change info group

Pers.No. 40000312
 Name OWEN ROBERT
 PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent
 PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elig>40hrs/wk Status Active
 Start 07/16/2012 to 11/15/2012

Personnel action
 Action Type U3 Appointment Change
 Reason for Action 12 In-Training Series - Complete

Status
 Employment 3 Active

Organizational assignment
 Position 71000015 INSTRUCTOR APPT CHANGE
 Personnel area 3500 Sup of Pub Instruction
 Employee group 0 Permanent
 Employee subgroup 01 Monthly(M) OT Exempt

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action
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9. Click  (Enter) to validate the information.

10. Click  (Save) to save.

Infotype Edit Goto Extras System Help

Copy Organizational Assignment (0001)

Org Structure

Personnel No. 40000312 Name OWEN ROBERT
 PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent
 PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elig>40hrs/wk Status Active
 Start 07/16/2012 to 11/15/2012

Enterprise structure

CoCode WA01 STATE OF WASHINGTON
 Pers.area 3500 Sup of Pub Instruction Subarea 0001 Non Represented
 Cost Ctr 35000000000 DEFAULT AGENC... Bus. Area 3500 Supt. of Public Instruction
 Fund

Personnel structure

EE group 0 Permanent Payr.area 11 Semi-monthly
 EE subgroup 01 Monthly(M) OT Exempt **Contract 05 InTrng/Trl Srv**

Organizational plan

Percentage 100.00 Assignment
 Position 71000015 APPTO INSTRUCTOR APPT ...
 Job key 00000000
 Exempt
 Org. Unit 31000029 APPT PERSONNEL ACTION...
 Org.key

Administrator

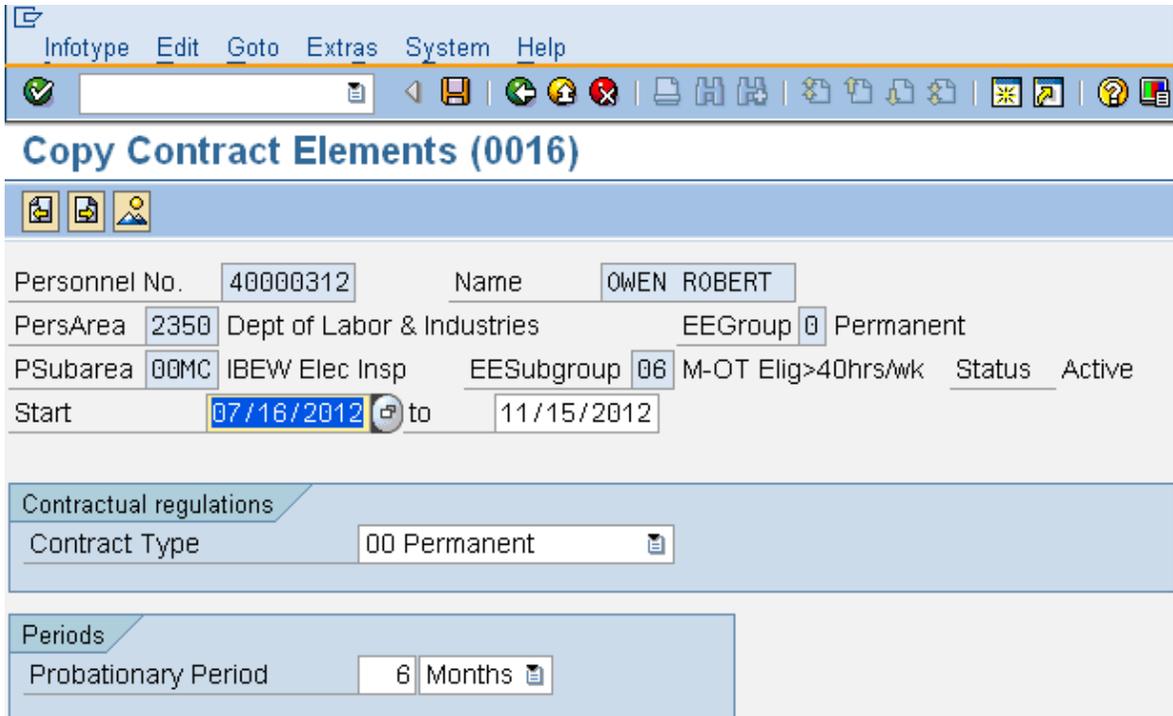
PersAdmin
 Time
 PayrAdmin

11. Perform one of the following:

If	Then
The In-Training plan has multiple levels	In the Contract field, click InTrng/Trl Srv from the drop-down list.
The employee successfully completed the In-Training Appointment	In the Contract field, click Trial Service from the drop-down list

12. Click  (Enter) to validate the information.

13. Click  (Save) to save.



Infotype Edit Goto Extras System Help

Copy Contract Elements (0016)

Personnel No. 40000312 Name OWEN ROBERT

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 07/16/2012 to 11/15/2012

Contractual regulations

Contract Type 00 Permanent

Periods

Probationary Period 6 Months

14. Click  (Enter) to validate the information.



The **Probationary period** field is also used for the Trial Service period. Verify that the value matches the Trial Service period.

15. Click  (Save) to save.

Infotype Edit Goto Extras System Help

Create Planned Working Time (0007)

Work schedule

Personnel No. 40000312 Name OWEN ROBERT

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 07/16/2012 To 12/31/9999

Work schedule rule

Work schedule rule FULL 5-8s: M-F 8 hpd

Time Mgmt status 9 9 - Time evaluation of planned times

Part-time employee Additional time ID

Working time

Employment percent 100.00 Dyn. daily work schedule

Daily working hours Min. Max.

Weekly working hours 0.00 Min. Max.

Monthly working hrs 0.00 Min. Max.

Annual working hours 0.00 Min. Max.

Weekly workdays

Additional fields

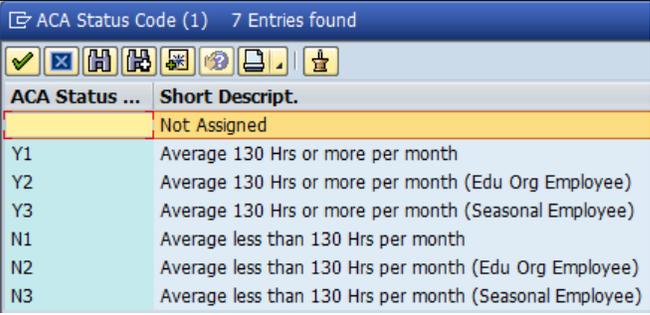
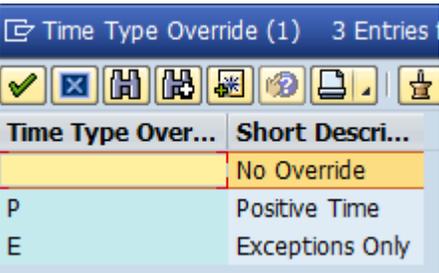
ACA Status Code Not Assigned

Time Type Override No Override

16. Complete the following fields:

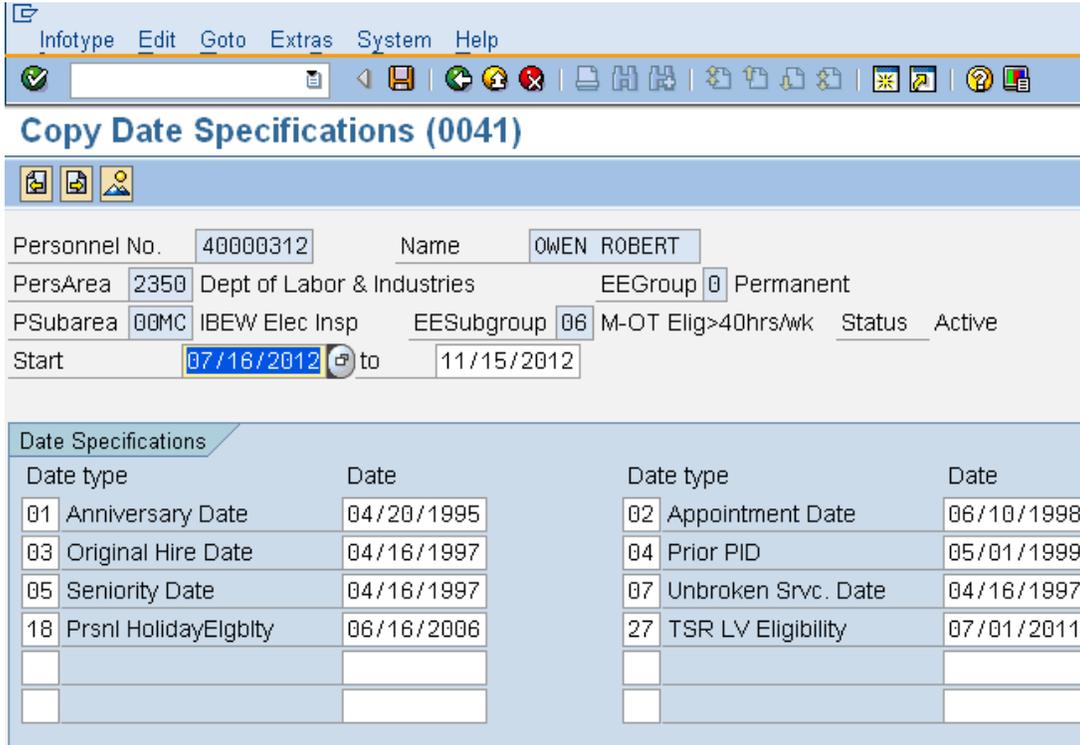
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Work schedule rule	R	A description of the duration and composition of employee working time for any given workday.  Note: The new record will default to FULL in this field. You will need to select the appropriate work schedule if the employee is not on a

		FULL 5-8s M-F 8hpd work schedule. Example: FULL
Time Mgmt status	R	This is part of the work schedule that an employee is assigned to and signifies how hours are calculated based on the employee's assigned work schedule. Example: 1-Time Evaluation of actual times - Use for Hourly employees 9-Time Evaluation of planned times - Use for Monthly employees
Part-Time Employee	O	Select the indicator only if the employee should be designated as Part-Time.
Additional time ID	R	The indicator on how employee leave will accrue Enter: <ul style="list-style-type: none"> ▪ 00- for full normal leave accrual (will default if to normal if field is left blank). ▪ 01- for NO leave accrual ▪ 02- for sick leave accrual only
Employment percent	R	The amount of time that an employee works per week in a particular position and is described in terms of a percentage. Example: 100.00
ACA Status Code	C	Used to select the average hours per month over the next 12 months, for the employee. Click on the match code to display the options:  Note: Effective January 1, 2014 this is a required entry for all new hires, rehires and employees who experience a change in employment status. DO NOT leave the default code of "Not Assigned". Press F1 in this field for additional information.  Tip: When a schedule change is keyed for an employee that has an ACA code, agencies must enter or update the ACA Status Code to reflect the employee's change of status.

		 <p>Example: Y1 – Average 130 Hrs or more per month</p>
Time Type Override	C	<p>This field is the time reporter override and applies only to agencies using, or planning to use the Time Leave and Attendance system (TLA).</p> <p> Tip: This entry is an override code. Updating this field is optional and only required if the agency needs to override the general timesheet requirements of an employee. Press F1 in this field for additional information.</p>  <p>Example: P Positive Time</p>

17. Click  (Enter) to validate the information.

18. Click  (Save) to save.



Copy Date Specifications (0041)

Personnel No. 40000312 Name OWEN ROBERT
 PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent
 PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elig>40hrs/wk Status Active
 Start 07/16/2012 to 11/15/2012

Date Specifications			
Date type	Date	Date type	Date
01 Anniversary Date	04/20/1995	02 Appointment Date	06/10/1998
03 Original Hire Date	04/16/1997	04 Prior PID	05/01/1999
05 Seniority Date	04/16/1997	07 Unbroken Srvc. Date	04/16/1997
18 Prsnl HolidayElgblty	06/16/2006	27 TSR LV Eligibility	07/01/2011

19. Review the employee’s Date Types and Dates, and make the necessary updates. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
02 Appointment Date	R	The Appointment date for the employee Example: 7/16/2012



If necessary, make changes, additions, or deletions to the date specifications.

20. Click  (Enter) to validate the information.

21. Click  (Save) to save.

22. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Reason	R	The reason for the change in the data on the Basic Pay infotype.  If you do not know the number for the Reason, you can click the  (Matchcode) to open the selection list. Example: 20 – Appointment Change
Next Increase	C	This is the date of the next scheduled increase in the employee’s pay and is used to override the automated periodic increment and longevity process.

		<p> If the employee is eligible for a periodic increment (PID) or longevity step, and moves to a new Pay Scale Type, Pay Scale Area, Pay Scale Group or Pay Scale Level, the agency Personnel Administration Processors must input the employee's current PID in the Next Increase field on the Basic Pay Infotype.</p> <p>Example: 07/16/2013</p>
Level	C	<p>This defines the step within a range for compensation.</p> <p> Level A will default into the field for classified employees on a pay scale range. You may need to change the level.</p> <p>Example: K</p>
Annual Salary	C	<p>This is the dollar amount that the employee receives as pay per year.</p> <p> If the employee is classified and on a pay scale range, the annual salary will populate based on the PS Group and Level.</p> <p> If the employee is WMS, Higher Ed Exempt, Students, Non Classified Elected Official, Non Classified Exempt Management Service, Non Classified Non Pay Scale, Non Classified Board Members you must enter the annual salary in this field.</p> <p> Entering the salary defines this person as Directly valued. Agencies are responsible for updating the salary when directly valued employees are due a pay increase.</p> <p>Example: 47,892.00</p>
Wage Type	C	<p>A type of payment that separates amounts and time units for various business processes.</p> <p> The wage type of 1003 should default in if the employee is monthly. Wage type 1001 should default in if the employee is hourly. Enter the wage type if the field is blank.</p> <p> You can also enter wage types for Shift Difference and Assignment Pay.</p> <p>Example: 1003 Pay Period Salary</p>

23. Click  (Enter) to validate the information.

24. Click  (Save) to save.



The **Personnel Administration Processor** will notify the **Organizational Management Processor** to update the job key to the appropriate job class. This will mark the end of

Appointment Change Action after In-Training appointment. After saving, click  to exit the action and transfer the employee's information packet to the **Payroll Processor** who will complete the action.

25. Start the transaction using the above menu path or transaction code **PA40**.

Personnel no.

Name

PersArea Dept of Labor & Industry

PSubarea IBEW Elec Insp Status

From

Action Type	Personnel...	EE group	EE subgr...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			



Payroll Processor –Do not put a “From” date in the field prior to executing the transaction.

26. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Personnel no.	R	The employee’s unique identifying number. Example: 40000312

27. Click  (Enter) to validate the information.

28. Click  (Execute) to execute a process or action.

Copy Actions (0000)

Execute info group Change info group

Pers.No. 40000312
 Name OWEN ROBERT
 PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent
 PSubarea 00MC IBEW Elec Insp EESubgroup 06 M-OT Elig>40hrs/wk Status Active
 Start 12/01/2012 to 12/31/9999

Personnel action
 Action Type U3 Appointment Change
 Reason for Action 12 In-Training Series - Complete

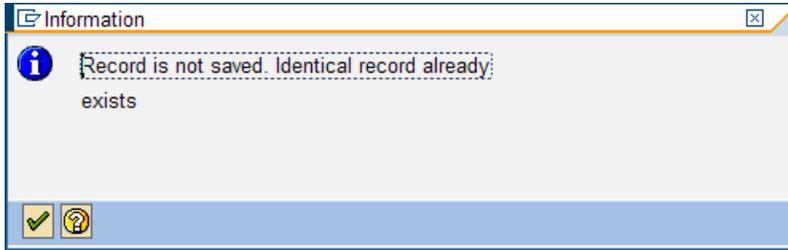
Status
 Employment 3 Active

Organizational assignment
 Position 70016262 ELEC CONS INSP
 Personnel area 2350 Dept of Labor & Industries
 Employee group 0 Permanent
 Employee subgroup 06 M-OT Elig>40hrs/wk

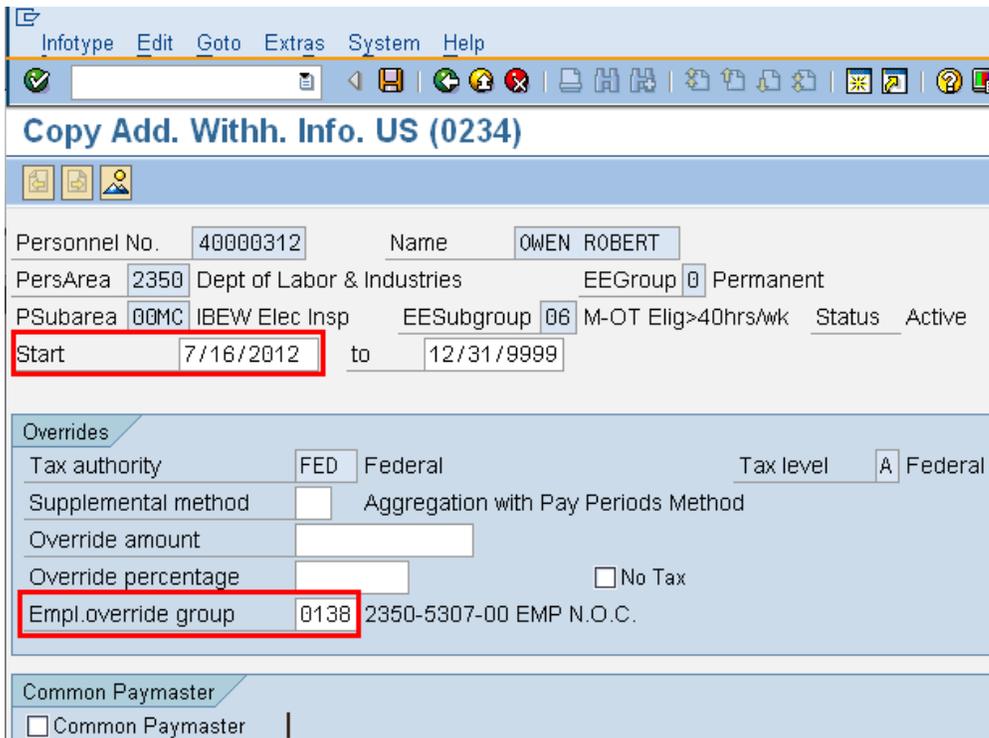
Additional actions

Start Date	Act.	Action Type	ActR	Reason for action
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29. Click .
30. The follow messages will appear. Click (Save) to continue.
31. An Information window will appear. Click (Continue) to continue.



32. Click  (Next Record) until you reach Subtypes for infotype Education, click  (Close) to bypass this infotype.
33. Continue to click  (Next Record) until you reach **Copy Add. Withh. Info. US (0234)** infotype.



34. Complete the following fields:

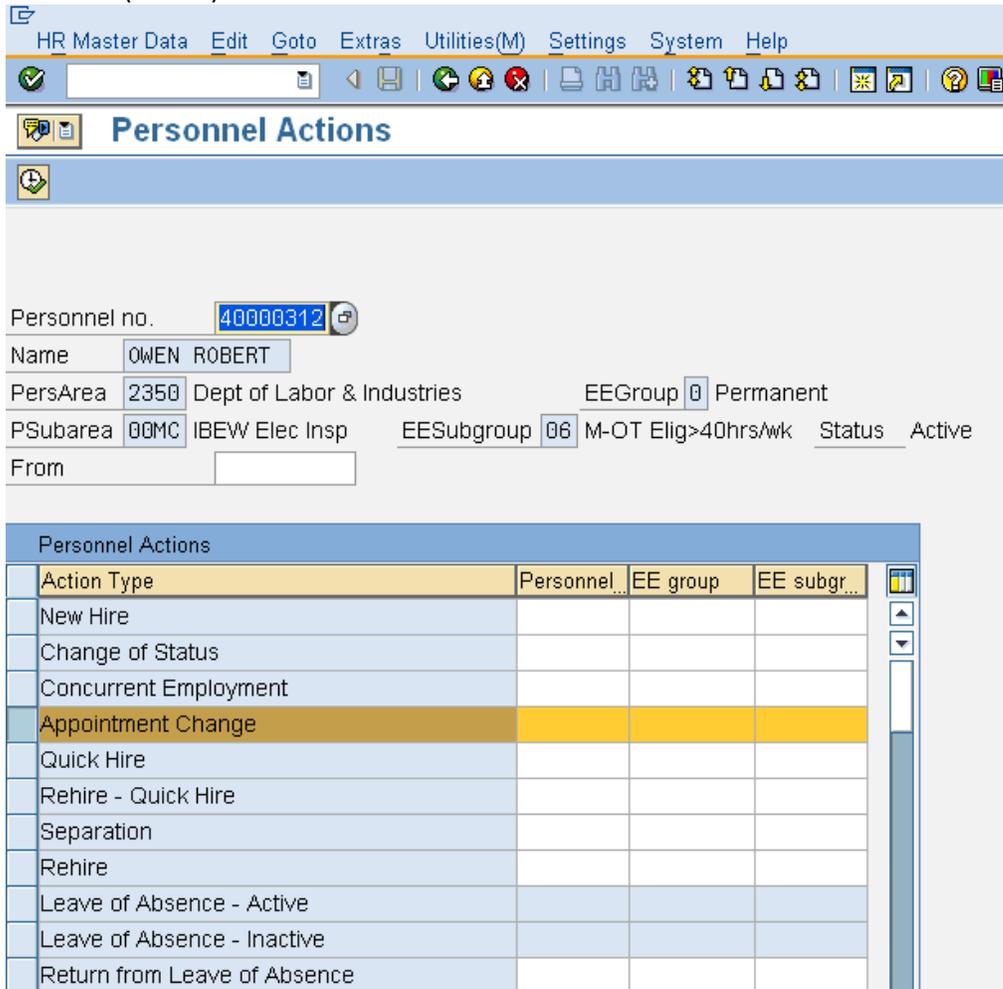
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Start	R	The start date for the payment/deduction.  Start date should be the first pay date the employee is with the gaining agency.

		Example: 7/16/2012
Empl. override group	R	This is the Worker's Compensation code that an employee holds for a particular job. Example: 0138

35. Click  (Enter) to validate the information

36. Click  (Save) to save.

37. Click  (Cancel) to cancel.



The screenshot shows the 'Personnel Actions' window in HR Master Data. The menu bar includes HR Master Data, Edit, Goto, Extras, Utilities(M), Settings, System, and Help. The toolbar contains various icons for navigation and actions. The main area displays the following information:

Personnel no. 

Name

PersArea Dept of Labor & Industries EEGroup Permanent

PSubarea IBEW Elec Insp EESubgroup M-OT Elig>40hrs/wk Status

From

Below this information is a table titled 'Personnel Actions' with the following columns: Action Type, Personnel..., EE group, and EE subgr... The table lists various action types, with 'Appointment Change' highlighted in yellow.

Action Type	Personnel...	EE group	EE subgr...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			

38. You have completed this transaction.

Results
You have completed an appointment change after an In-Training Appointment.

Comments

Once the Plan 3 employee has submitted their completed DRS member information form designating their Plan 3 contribution rate, see the OLQR procedure [Retirement Plan Choice 90 day \(New Hire\)](#), to complete the retirement choice.