Appointment Change Action – Transfer

Purpose Use this procedure to process an appointment change for an employee who is transferring to a position in their current agency, sub-agency, or in another agency.

Trigger Perform this procedure when an employee has been appointed to another position.

Prerequisites

- The employee must be active in HRMS.
- There must be a position to appoint the employee into.

End User Roles In order to perform this transaction you must be assigned the following role: Personnel Administration Processor

Change History	
Date	**Change Description**
7/23/2009	Procedure created in new template. Updates to the Helpful Hints section, screenshots, Payroll, and Benefits Processor steps.
8/6/2009	Steps 38-39, 50-51 have been updated to reflect the type of warning message that displays during the 'Execute info group' function.
9/8/2009	Step 16 has been updated to clarify the Position Vacancy process for gaining and losing agencies. See HRMS Communication 9/8/09.
2/3/2012	Updated *Personnel Actions* selection screenshots
12/27/2012	Added to step 16. Provided link to user procedure *Position-Maintain Vacancy*
03/25/2013	Added step 24 on how to *Create Communication (0150)* to create an employee's email address into the dynamic action.
05/28/2014	Updated the *Planned Working Time (0007)* screen shot and added description to the fields of the infotype. Updated description of the **next increase** field.

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

Transaction Code PA40

Helpful Hints	**If the employee is transferring to another agency, the gaining agency will perform this procedure and contact the losing agency and inform them of the employee's transfer.** The **losing agency** will need to enter/change any remaining master data prior to the **gaining agency** performing the appointment change action. Example: leave to enter or delete in CATS, garnishments, or anything pending master data for the employee. **IMPORTANT NOTE REGARDING EMPLOYEES ENROLLED IN HEALTH INSURANCE:** When a transfer occurs at any time prior to the end of the month, the **losing** agency is responsible for paying the state share for the

	entire month. The **<u>gaining</u>** agency will not be billed for state share until the month following the transfer date. In PAY1, **<u>losing agency</u>** must enter **401** (transfer out code) in the TRANSFER REASON field, and the last day of the month (the losing agency is responsible for the insurance premiums for the entire month) in the TRANSFER EFF DATE field. Press PF10 to update. In PAY1, **<u>gaining agency</u>** must enter the new HOME AGENCY/SUB-AGENCY (this requires that you move the cursor to the home agency field), enter **201** (transfer in code) in the TRANSFER REASON field and the transfer-in date (should always be the first day of the month in which the new agency is responsible for the insurance premiums) in the TRANSFER EFF DATE field. Press F10 to update. This will set the home agency lock to the new agency. <u>Do not update any other fields on this screen until after the transfer transaction</u>. Additional changes to the A.41 screen fields will require a separate transaction. Contact HCA for more instruction by phone: 360 923-2847 or by email: helpdesk@hca.wa.gov . If the employee is transferring in their current agency perform this procedure by your assigned role. This procedure my require hand-offs to other roles (payroll processor and /or benefits processor) depending on the structure of your agency and your role at your agency. If a hand-off is made to another role, it is critical the transaction code **PA40** is used and the "*execute into infogroup*" process is used. This is explained further in this procedure. Using **PA40** will ensure that all required infotypes are completed. Do not use transaction code **PA30** to complete portions of the appointment change action.

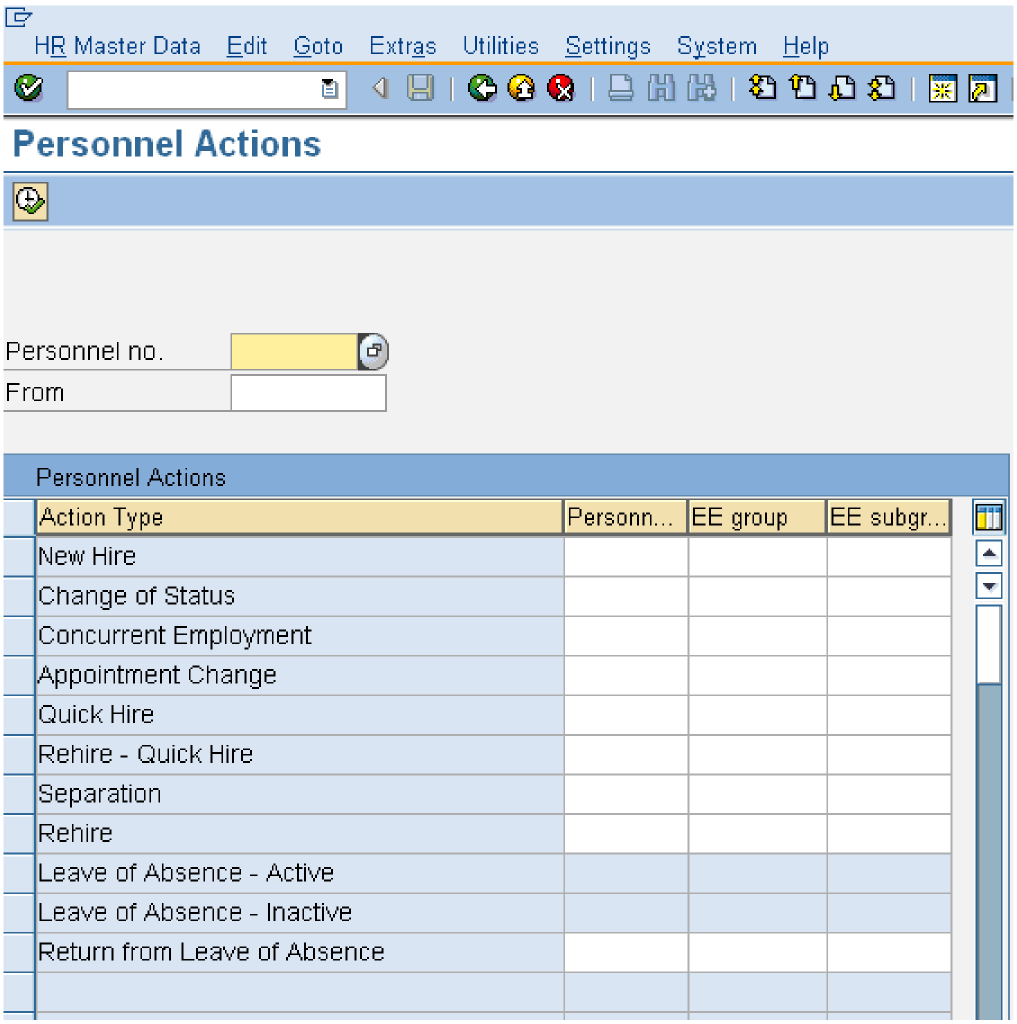
The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

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

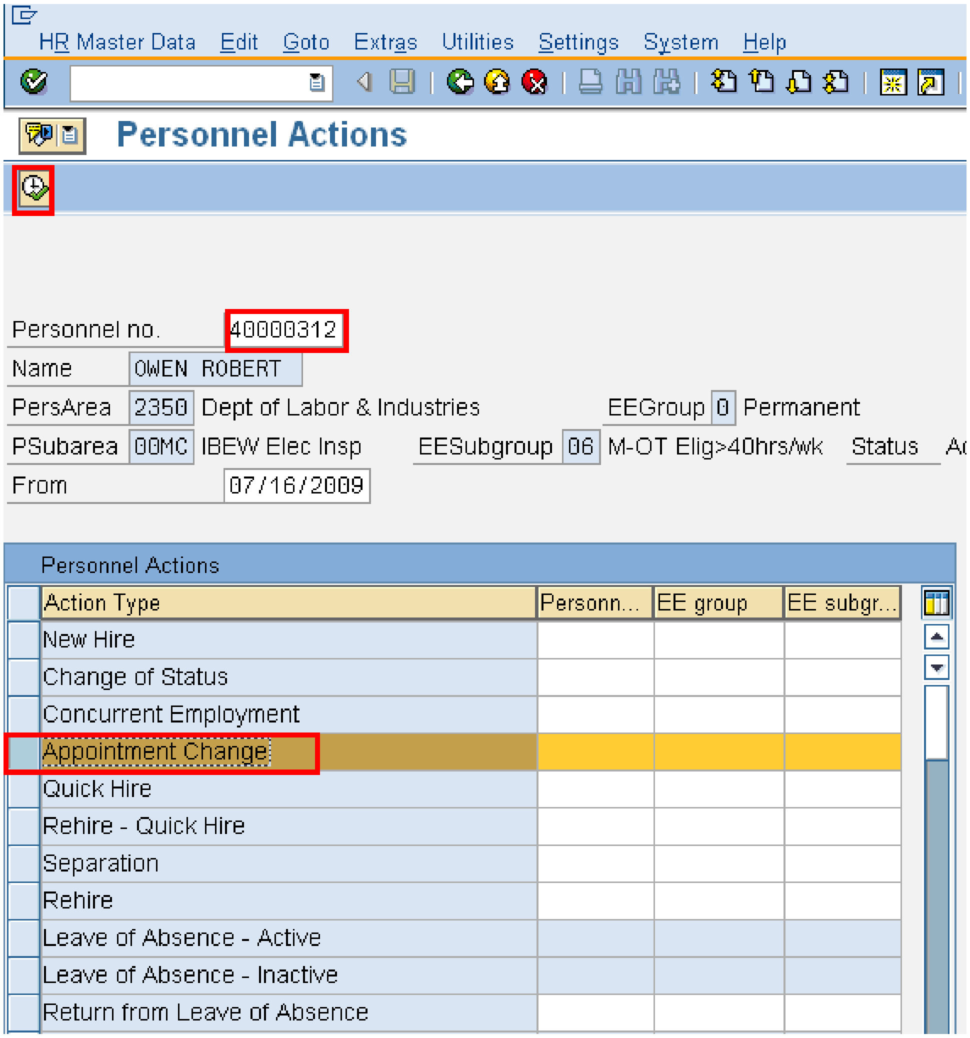
3. Perform one of the following:

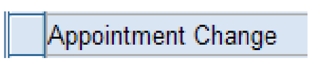
IF	Go To
You are the Personnel Administration Processor	Step 4
You are the Payroll Processor	Step 33
You are the Benefits Processor	Step 45

4. Complete the following fields:

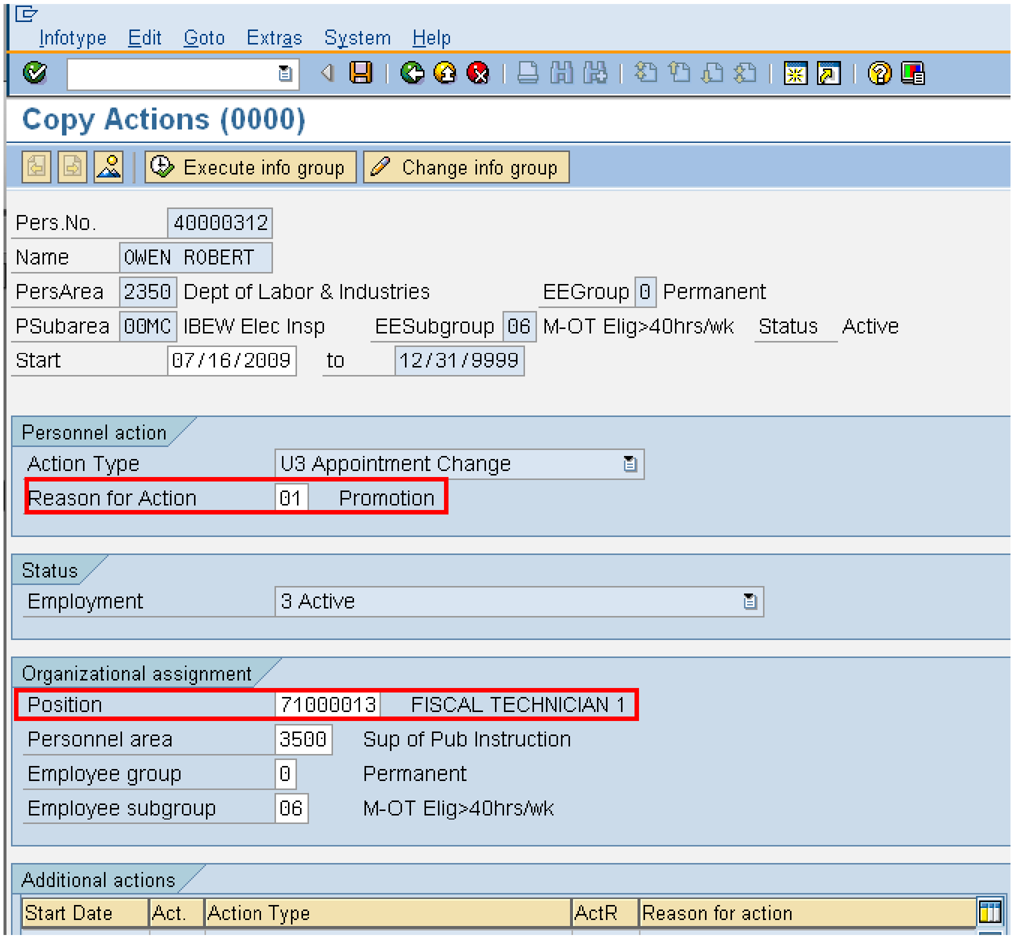
From	R	The effective date of the action. Only enter the *From* date if you are the Personnel Administration Processor initiating the appointment change action. **Example**: 07/16/2009

5. Click (Enter) to validate the information.



6. Click the box to the left of  to select.

7. Click  (Execute) to execute the action.

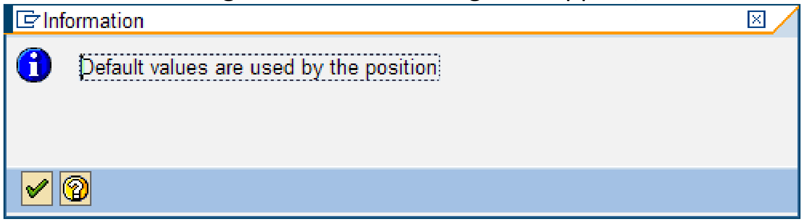


8. Complete the following fields:

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. **Example**: 01 Promotion
Position	R	This is a system-assigned number given to a particular position. Each unique position will have its own position number. **Example:** 71000013

9. Click (Enter) to validate the information.

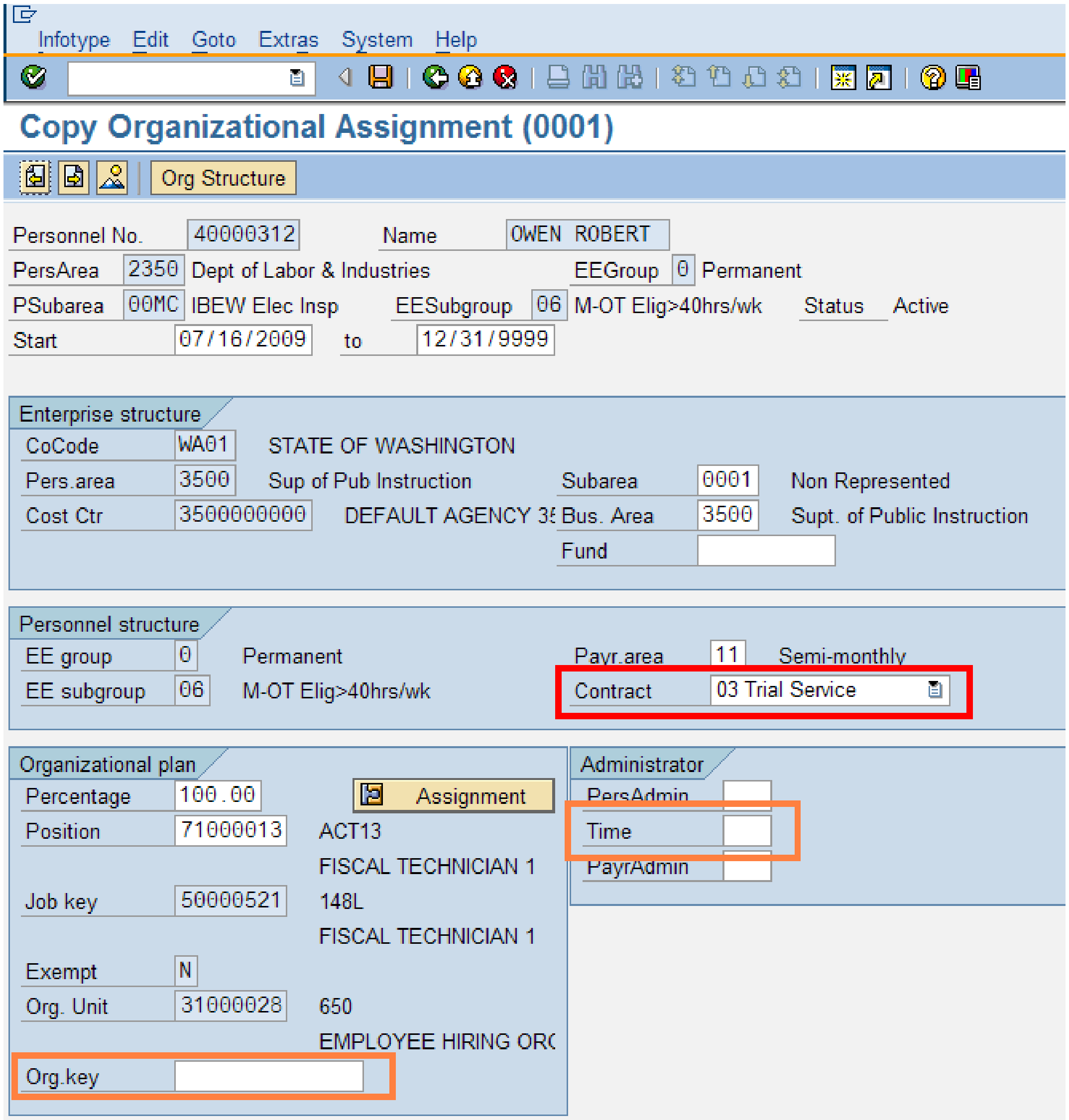
The following Information Message will appear,



10. Click (Copy) to accept.

11. Click (Enter) to validate the information.

12. Click (Save) to save.



13. Complete the following fields:

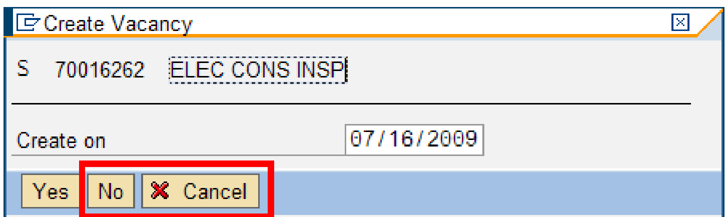
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Contract	R	The status of the appointment. Click (Dropdown) to view the selection list. **Example**: 03 Trial Service.
Org. Key	O	The pay distribution location. This field is used at the discretion of the agency. **Example:** 1RAMAD

Time	O	The time data administrator is responsible for the employees assigned to him or her. This field is used at the discretion of the agency. **Example:** DA

14. Click (Enter) to validate the information.

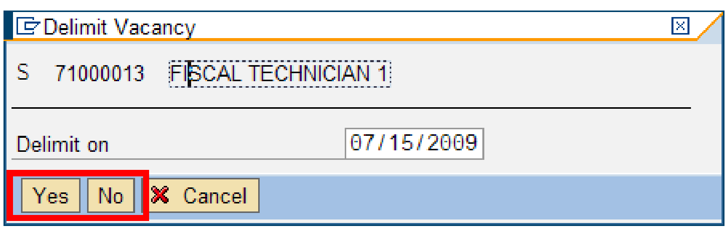
15. Click (Save) to save.

16. You will receive the following messages:



As the gaining agency, you cannot create the vacancy for the losing agency's position. As a courtesy, please contact the losing agency to inform them of the vacancy. Click 'No' or 'Cancel'.

The losing agency should manually update their position's vacancy infotype.

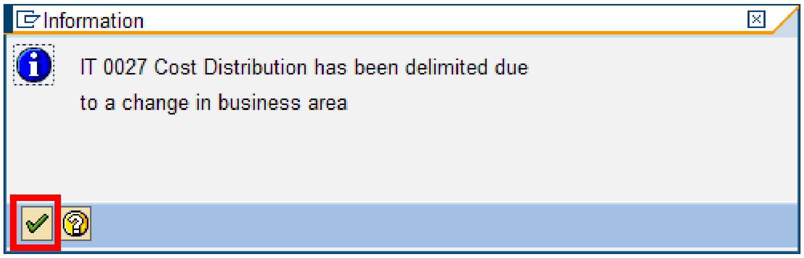


Select the appropriate option for your personnel area's position. Click 'Yes' or 'No'.

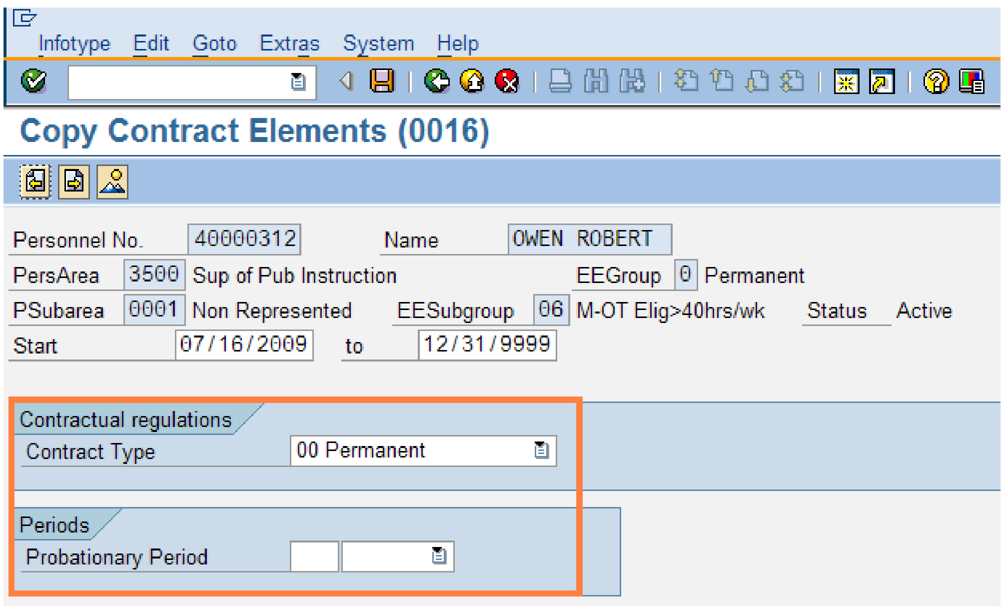
This step is important in order to maintain accurate vacancy reporting in HRMS and Business Intelligence (BI).

17. The Delimit Cost Distribution will only come up if the *Cost Distribution* Infotype (00027) has been created by the losing agency.

If this does not come up during the action skip to Step 18.



Click (Continue) to continue.



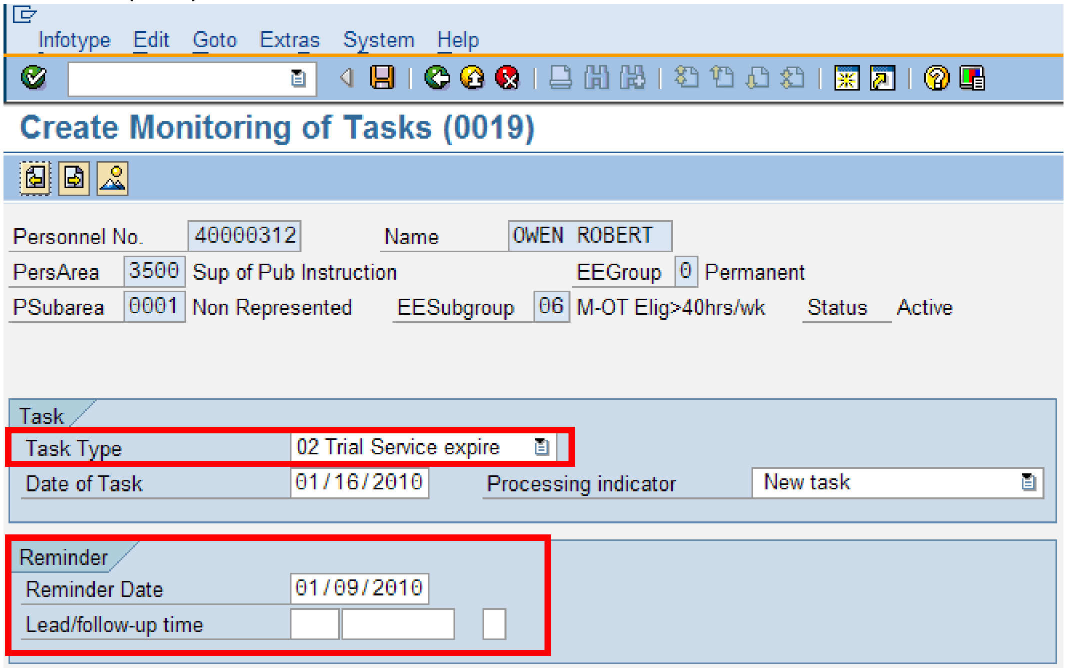
18. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Contract type	C	It defines an employee's State status as either permanent or non-permanent. **Example**: 00 Permanent.

Probationary period	O	This denotes how long an employee is in probation status. If the probationary period is not entered, the next infotype (*Monitoring of Tasks* (0019)) will not appear. The **Probationary period** field is also used for the Trial Service period. Verify that the value matches the Trial Service period. **Example:** 6 Months

19. Click (Enter) to validate the information.

20. Click (Save) to save.



The Monitoring of Tasks infotype may not appear based on the chosen contract type. If the infotype does not appear, skip to the Step 24.

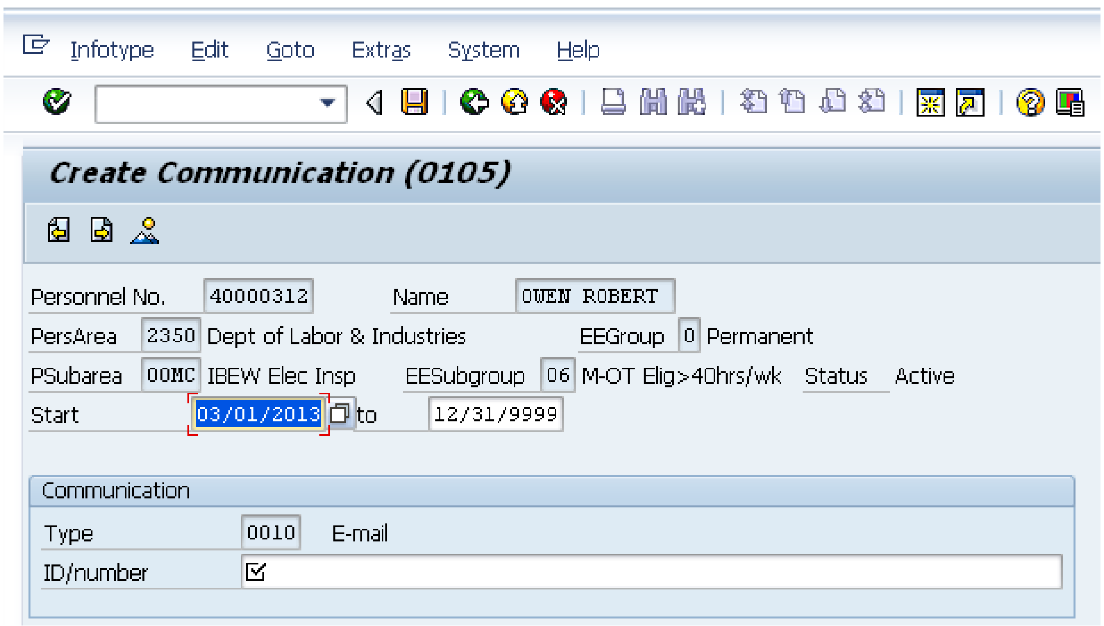
21. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Task Type	R	A task type is a relevant task that an HRMS user would be expected to perform. Click (Dropdown) to view the selection list. **Example**: 02 – Trial Service expire

Reminder Date	O	This is the date on which the system will remind a user (via report) that a specific period is expiring or a record needs to be updated. **Example**: 01/09/2010
Lead/follow-up time	O	This is the amount of time to be notified in advance or after an event has occurred. When the infotype is validated, this field will be converted into the *Reminder Date* field based on the *Date of Task*. **Example:** 1 Weeks

22. Click (Enter) to validate the information.

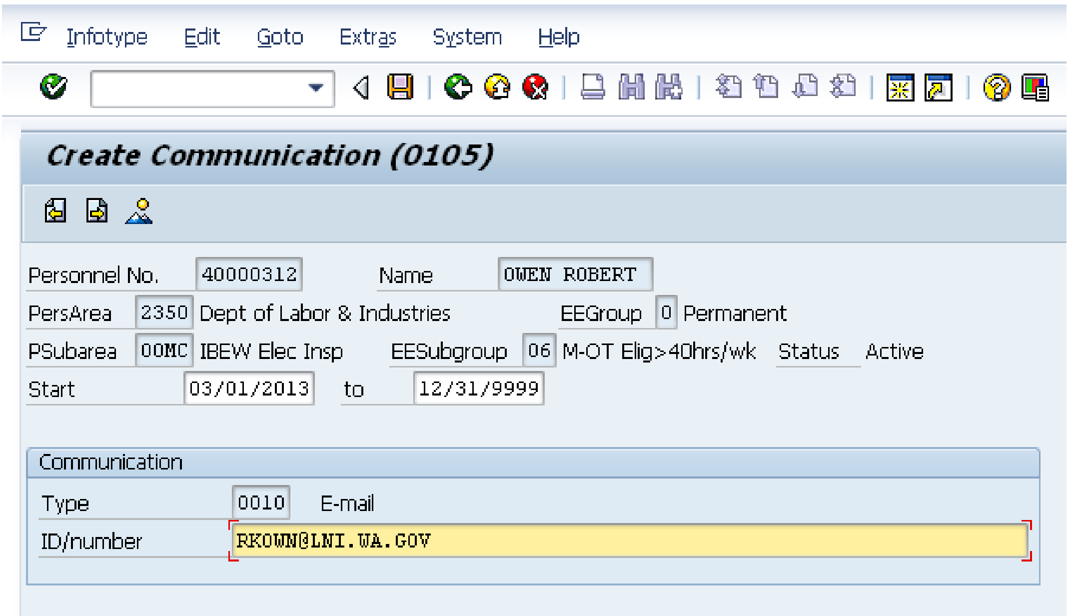
23. Click (Save) to save.



24. Complete the following fields:

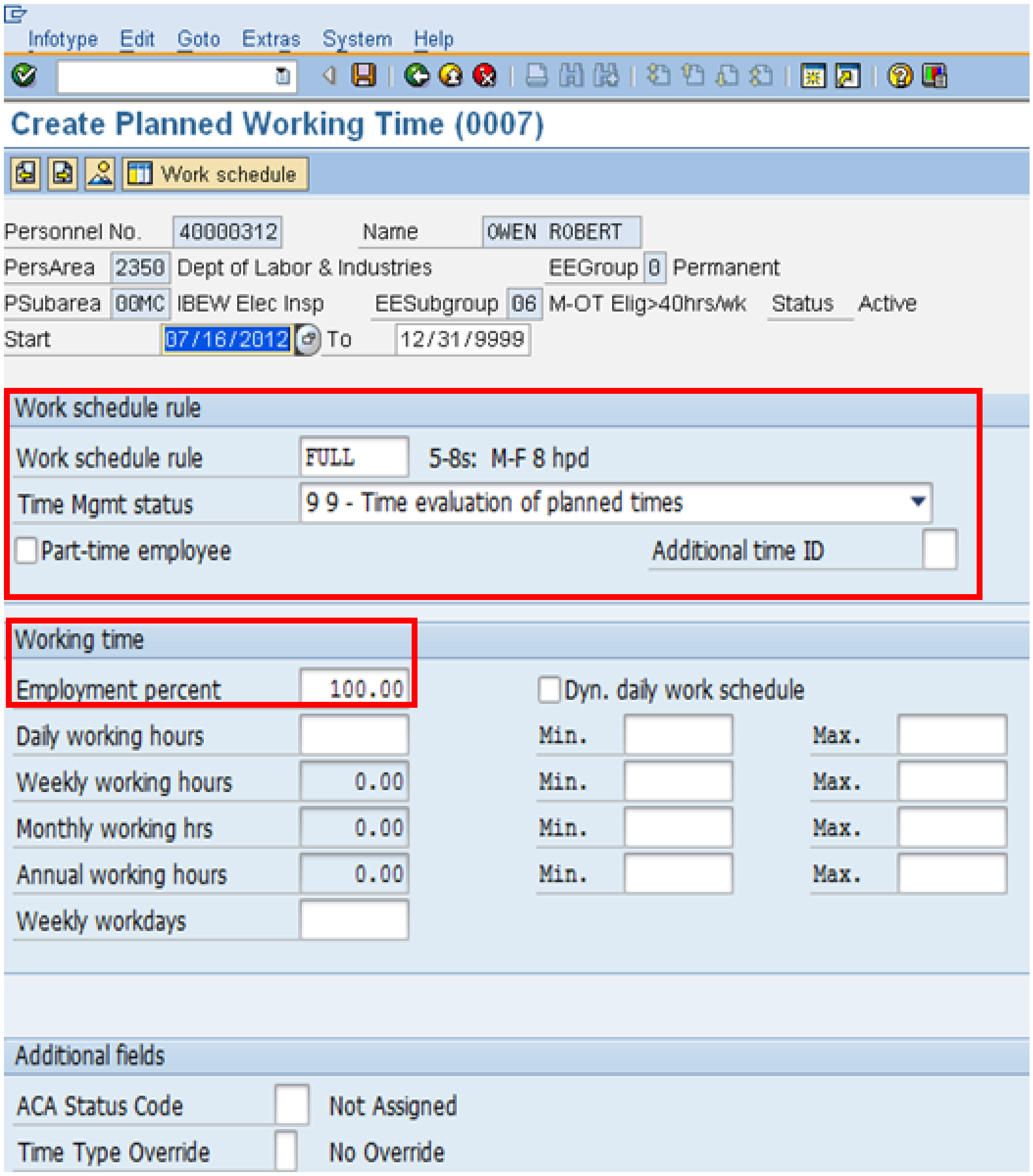
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
ID/NUMBER	R	Enter the employee's work email address. **If you do not know the email address** at the time of the new hire, click the next record button to move to the next infotype.

		• Enter the email address using Maintain HR Master Data PA30 as soon as you obtain it. **Example**: RKOWN@LNI.WA.GOV



25. Click  (Enter) to validate.

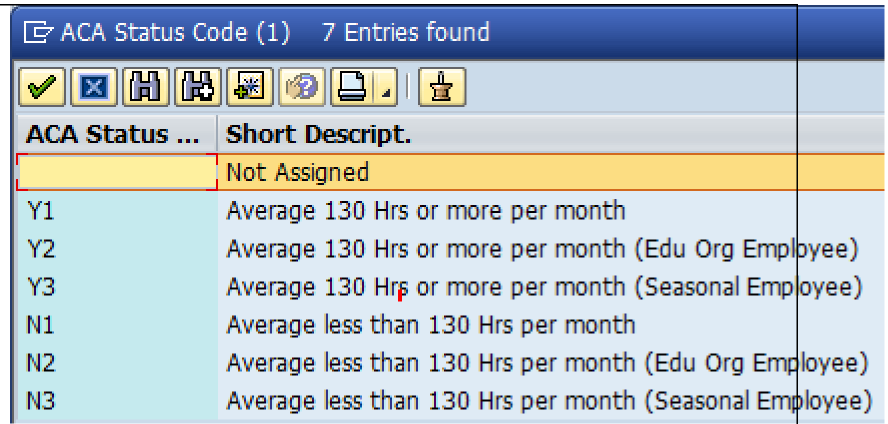
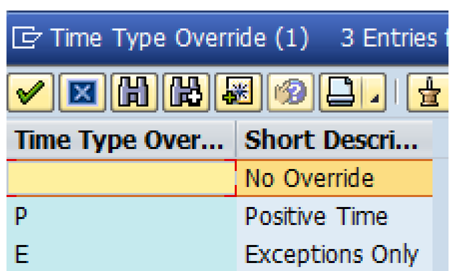
26. Click  (Save) to save.



27. Complete the following fields:

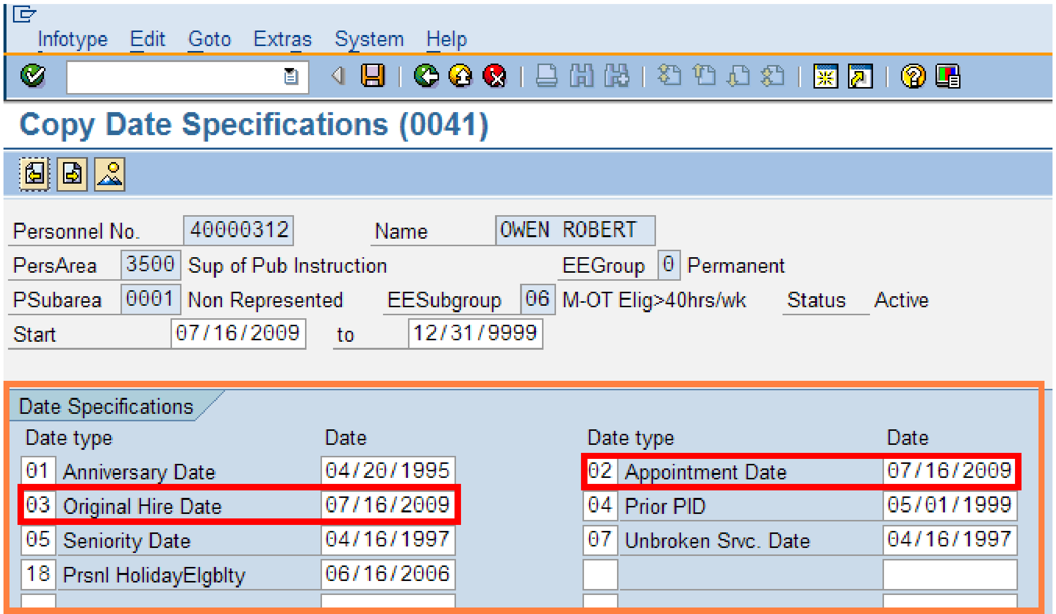
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Work schedule rule	R	A description of the duration and composition of employee working time for any given workday. **Note:** The new record will default to **FULL** in this field. You will need to select the appropriate work schedule if the employee is not on a Full 5-8s M-F 8hpd work schedule.

		Example: FULL 5-8s M-F 8hpd
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**: ▪ **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.

		 **Example:** Y1 – Average 130 Hrs or more per month
Time Type Override	C	This field is the time reporter override and applies **only** to agencies using, or planning to use the Time Leave and Attendance system (TLA). **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.  **Example:** P Positive Time

28. Click (Enter) to validate the information.

29. Click (Save) to save.



In HRMS, there are a limited number of date types to enter into Date Specifications. You are limited to 12 date types for each record.

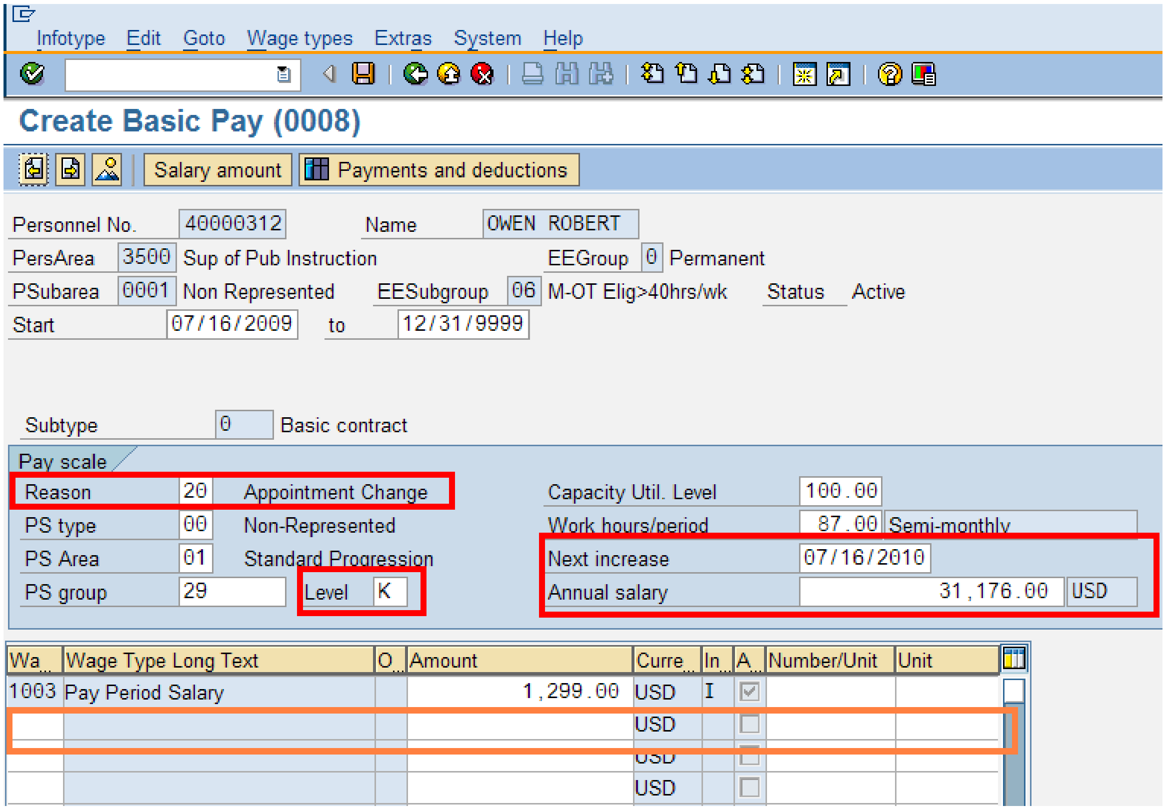
30. Review the employee's Date Types and Dates, and make the necessary updates.

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Date type: Original Hire Date (03)	C	The date the employee starts at an agency. If the Appointment Change is to a new agency this date should reflect the date the employee went to the new agency. **Example**: 03 (Original Hire Date) – 07/16/2009
Date Type: Appointment Date	R	The effective date of the appointment. **Example**: 02 (Appointment Date) – 07/16/2009

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

31. Click (Enter) to validate the information.

32. Click (Save) to save.



33. 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. **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 HR Processors must input the employee's current PID in the Next**

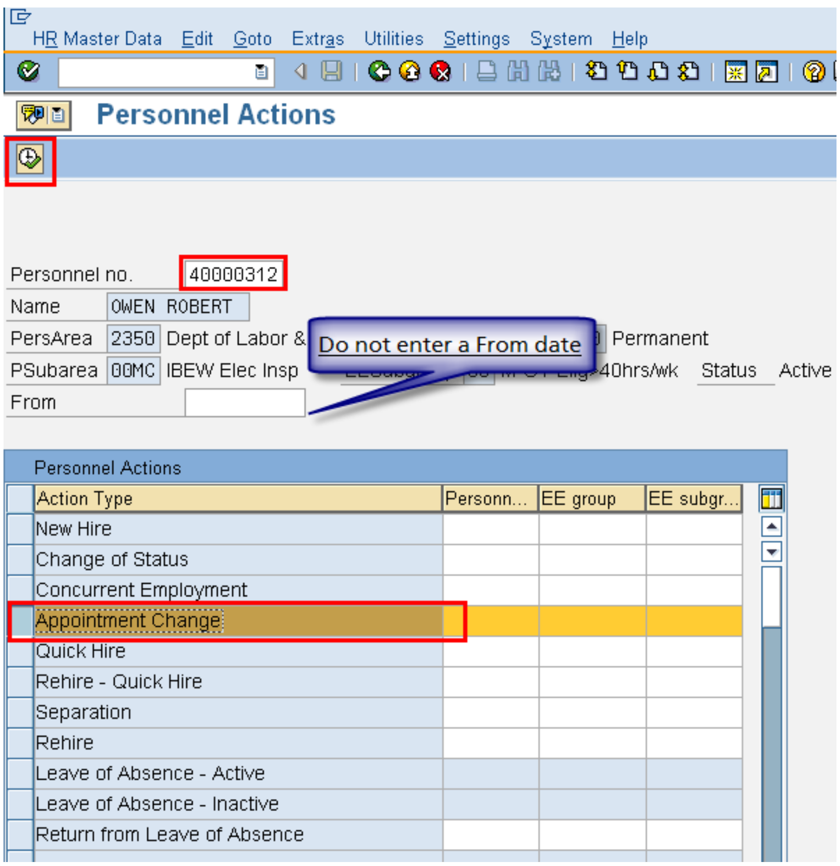
		Increase field on the Basic Pay Infotype **Example**: 07/16/2010
Level	C	This defines the step within a range for compensation. Level A will default into the field. The PS Level is used to reflect the salary for a General Government employee and defines this as Indirectly Valuated. You may need to change the level. **Example**: K
Annual Salary	C	This is the dollar amount that the employee receives as pay per year. If the employee is classified and on a pay scale range, the annual salary will populate based on the PS Group and Level. 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. 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. **Example**: 31,176.00
Wage Type	C	A type of payment that separates amounts and time units for various business processes. . 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. You can also enter wage types for Shift Difference and Assignment Pay. **Example**: 1003 Pay Period Salary

34. Click (Enter) to validate the information.

35. Click (Save) to save.

For the ***Personnel Administration Processor***, this will mark the end of the Appointment Change action. After saving, click to exit the action and transfer the employee's information packet to the ***Payroll Processor*** who will complete the action.

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



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

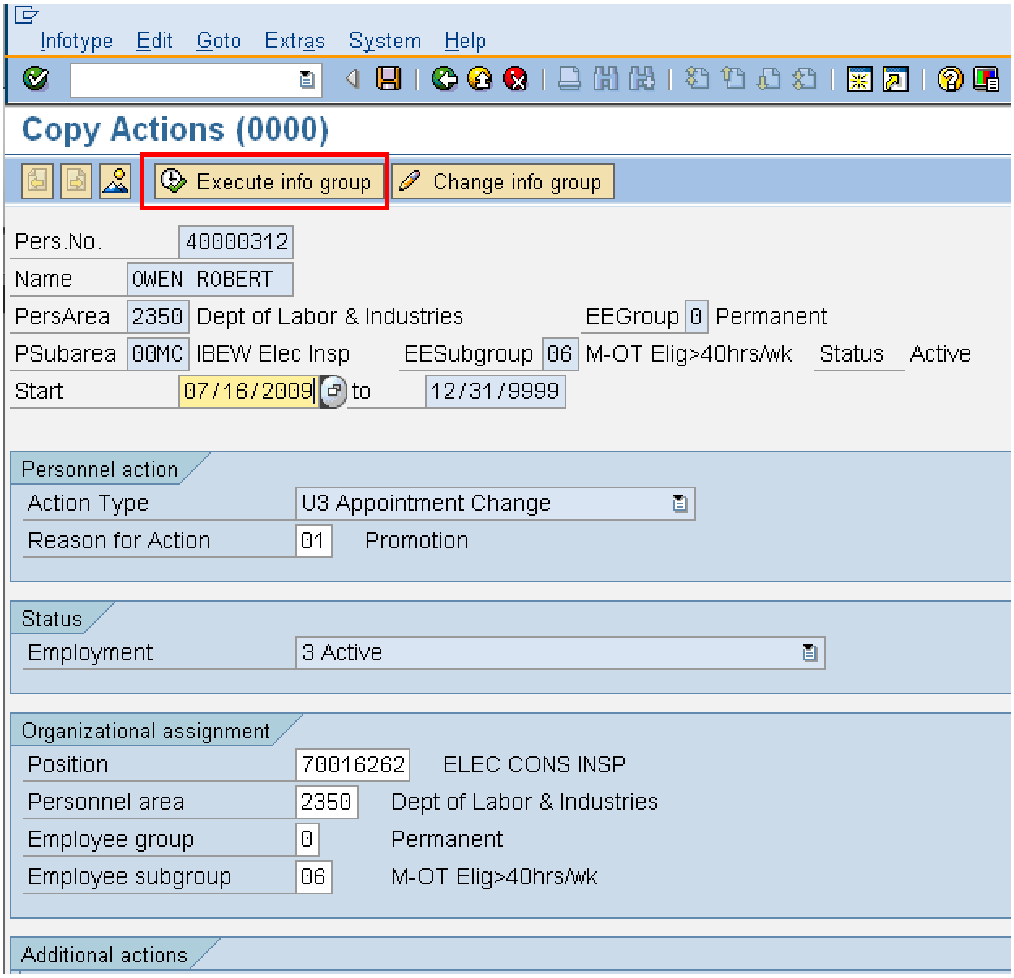
37. Complete the following fields:

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

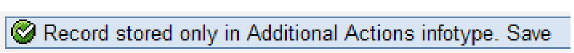
38. Click (Enter) to validate the information.

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

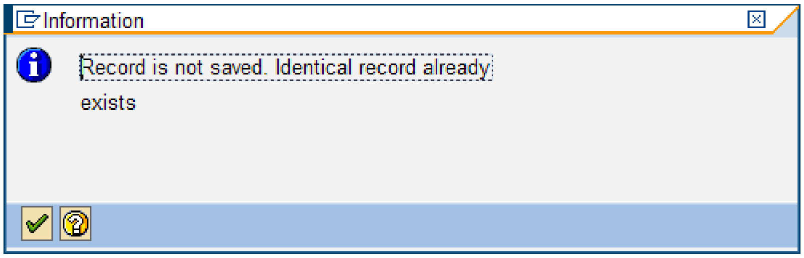


40. Click Execute info group.

41. The follow messages will appear. Click (Save) to continue.

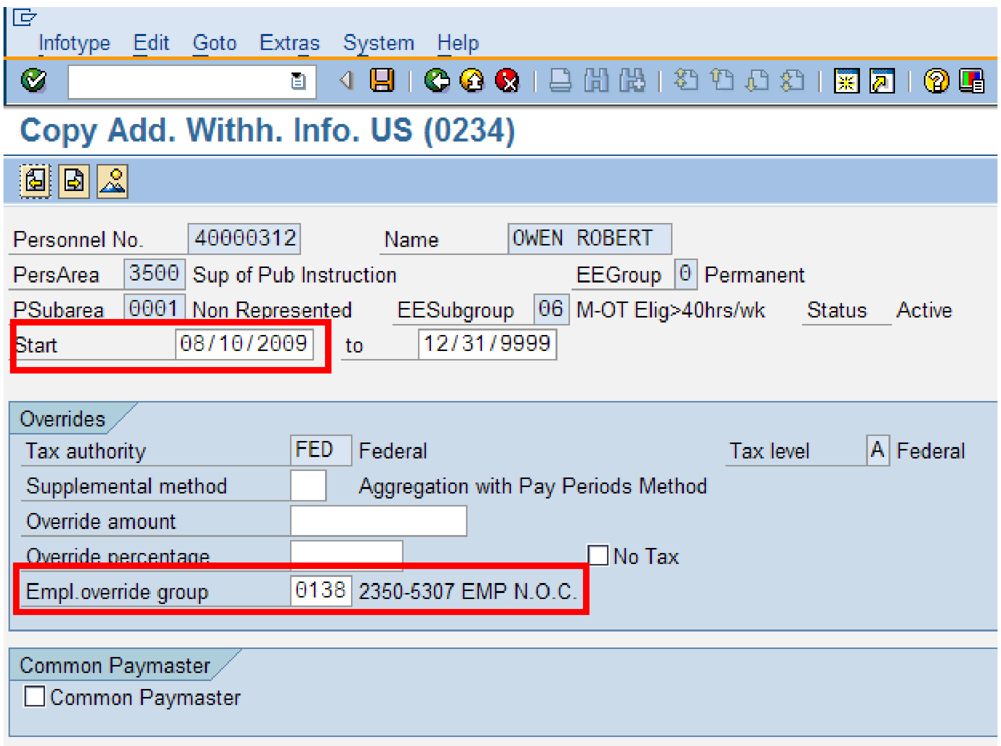


42. An Information window will appear. Click (Continue) to continue.



43. Click (Next Record) until you reach Subtypes for infotype Education, click (Close) to by-pass this infotype.

44. Continue to click (Next Record) until you reach *Create Add. Withh. Info. US* (0234) infotype.



45. 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: 08/10/2009
Empl. override group	R	This is the Worker's Compensation code that an employee holds for a particular job. **Example:** 0079

46. Click (Enter) to validate the information

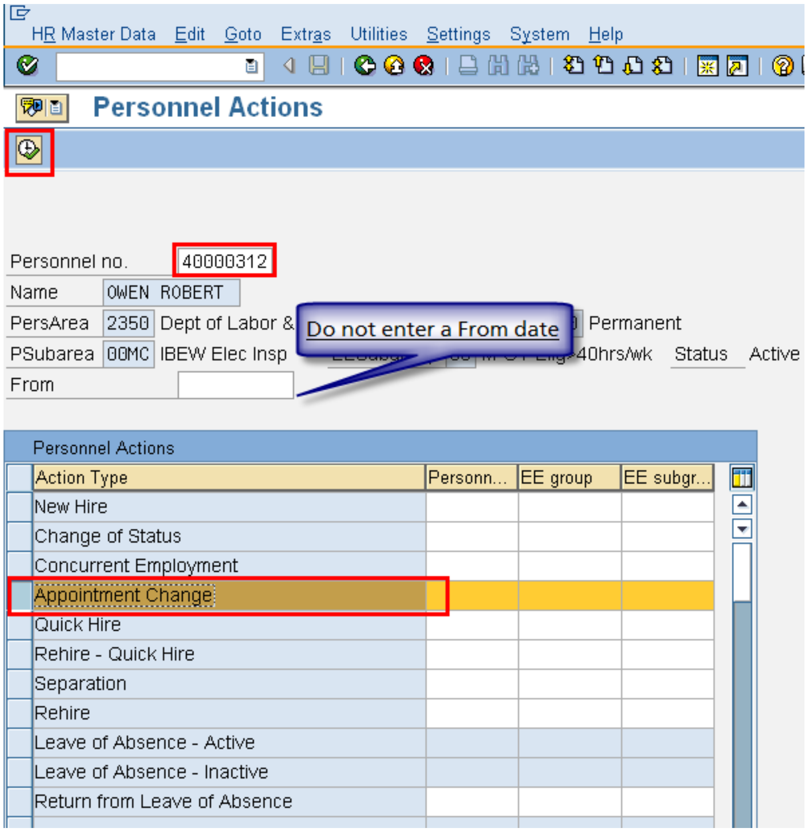
47. Click (Save) to save.

For the ***Payroll Processor***, this will mark the end of the Appointment Change action.

Payroll Processor if the employee has recurring payments /deductions, go to **PA30** and follow the procedures Create a Recurring Payment or Create Recurring Deduction.

After saving, click to exit the action and transfer the employee's information packet to the ***Benefits Processor*** who will complete the action.

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



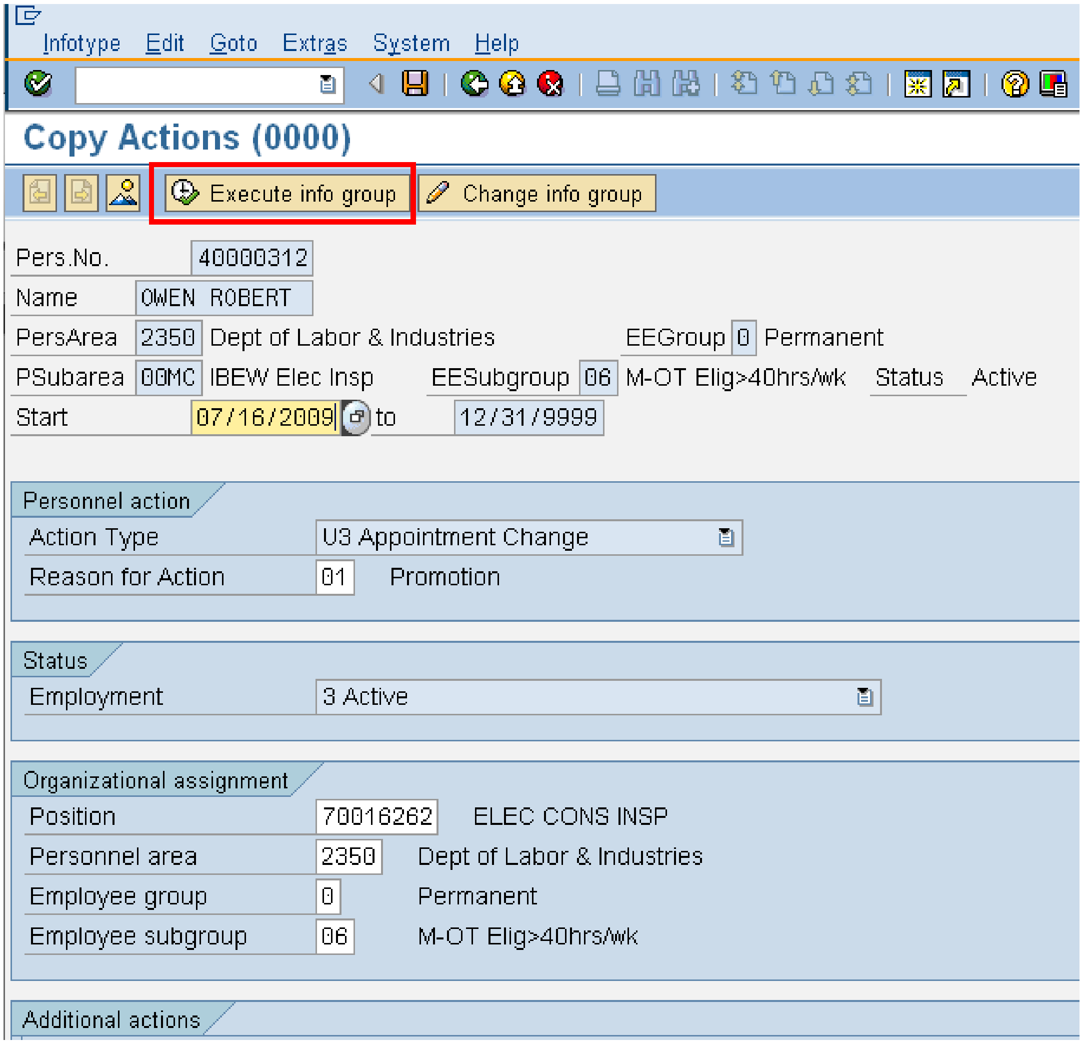
Benefits Processor –Do not put a "From" date in the field prior to executing the transaction.

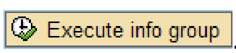
49. Complete the following fields:

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

50. Click (Enter) to validate the information.

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



52. Click 

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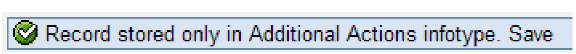
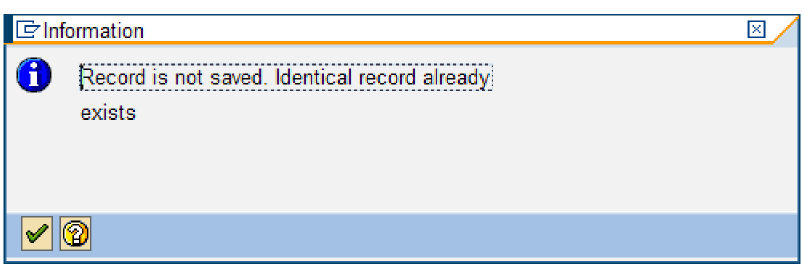
53. The follow messages will appear. Click  (Save) to continue.

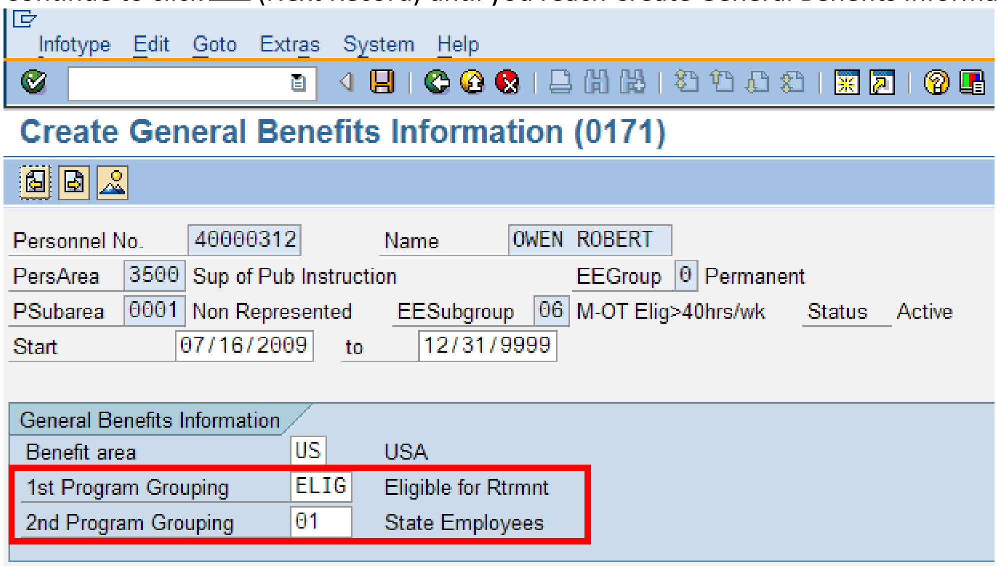


54. An Information window will appear. Click  (Continue) to continue.



55. Click (Next Record) until you reach Subtypes for infotype Education, click (Close) to by-pass this infotype.

56. Continue to click (Next Record) until you reach Create General Benefits Information (0171).



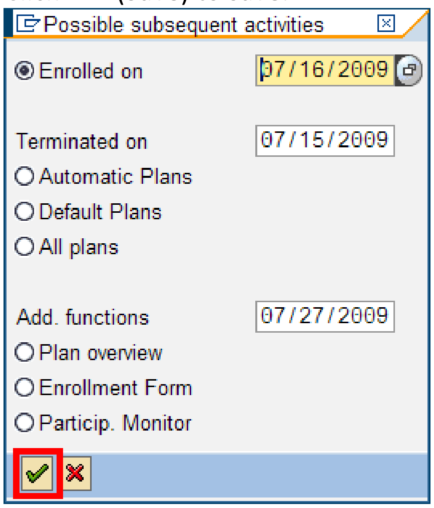
57. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
1st Program Grouping	R	This is used to determine an employee's retirement plan eligibility. The **1st Program Grouping** defaults in as eligible. To verify that the position is eligible use transaction code **PO13D**, click the gray box to the left of *Acct Assignment Features* infotype. If there is an X in the box next to Retirement Eligible field, then the position is retirement eligible. If the box is blank, the position is not retirement eligible. **Example**: ELIG – Eligible for Rtmnt
2nd Program Grouping	R	This defines the employee's job type and employer. The value in the **2nd Program Grouping** field defaults from personnel area. You will have to change the **2nd Program Grouping** field if: • An employee chooses a different plan. • The employee type defaulted to a code not consistent with the System/Plan set up at hiring time. • An employee changes positions and wants to continue

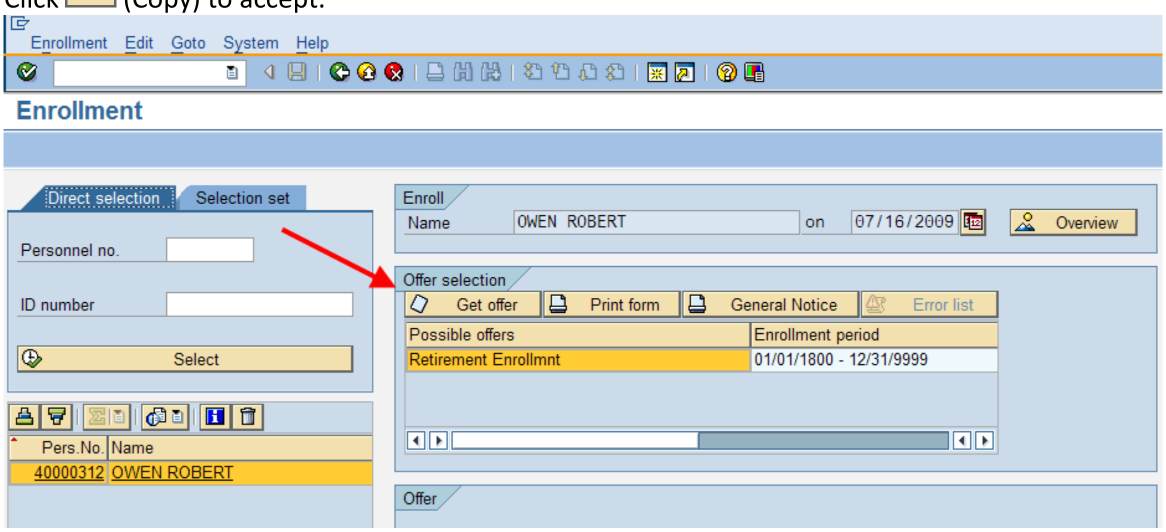
		contributing to the System/Plan from his previous position rather than the one that defaults with the new position. For a list of valid type codes for each retirement system, see [The Employer Handbook - Type Codes] **Example**: 01 (State Employee)

58. Click (Enter) to validate the information.

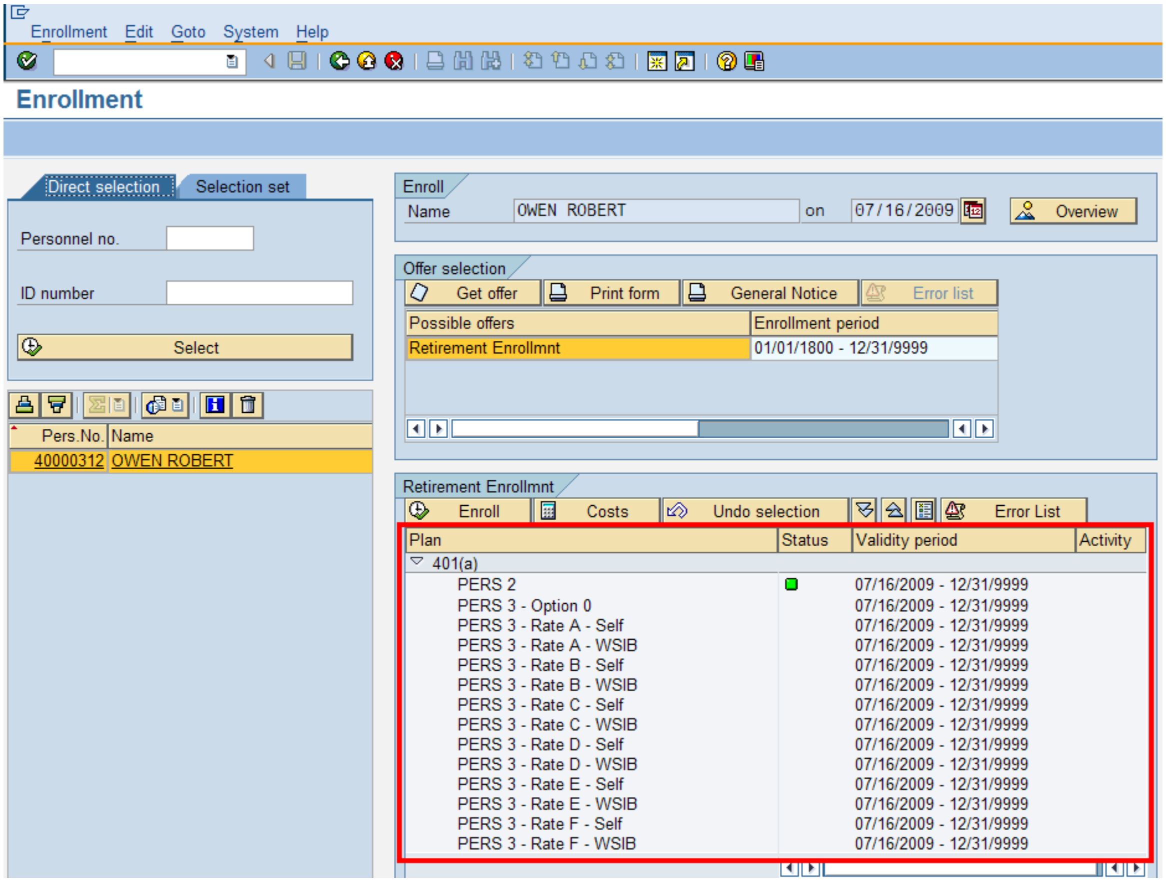
59. Click (Save) to save.



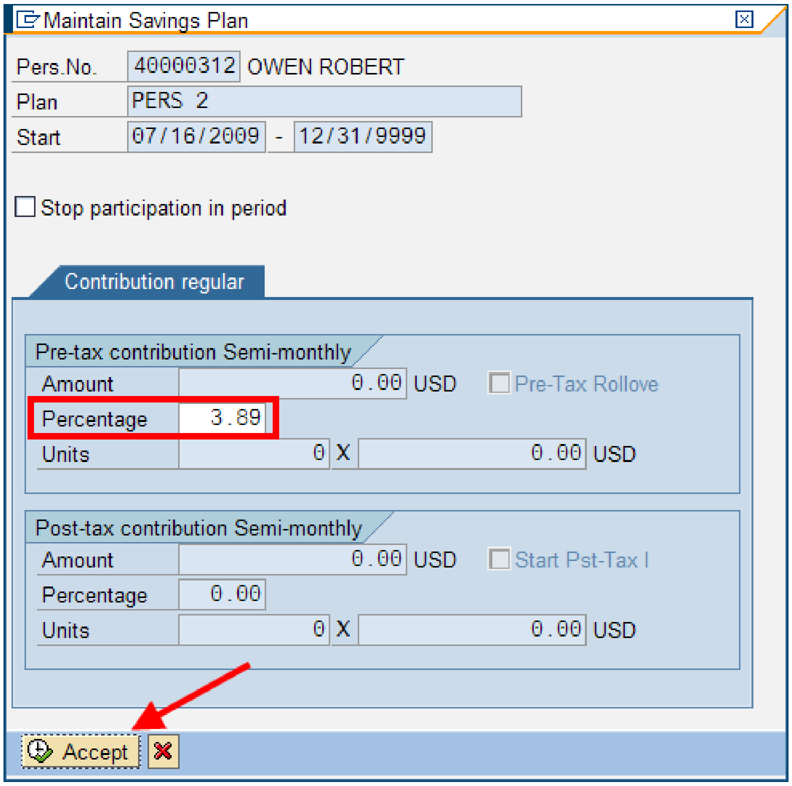
60. Click (Copy) to accept.



61. Click Get offer .



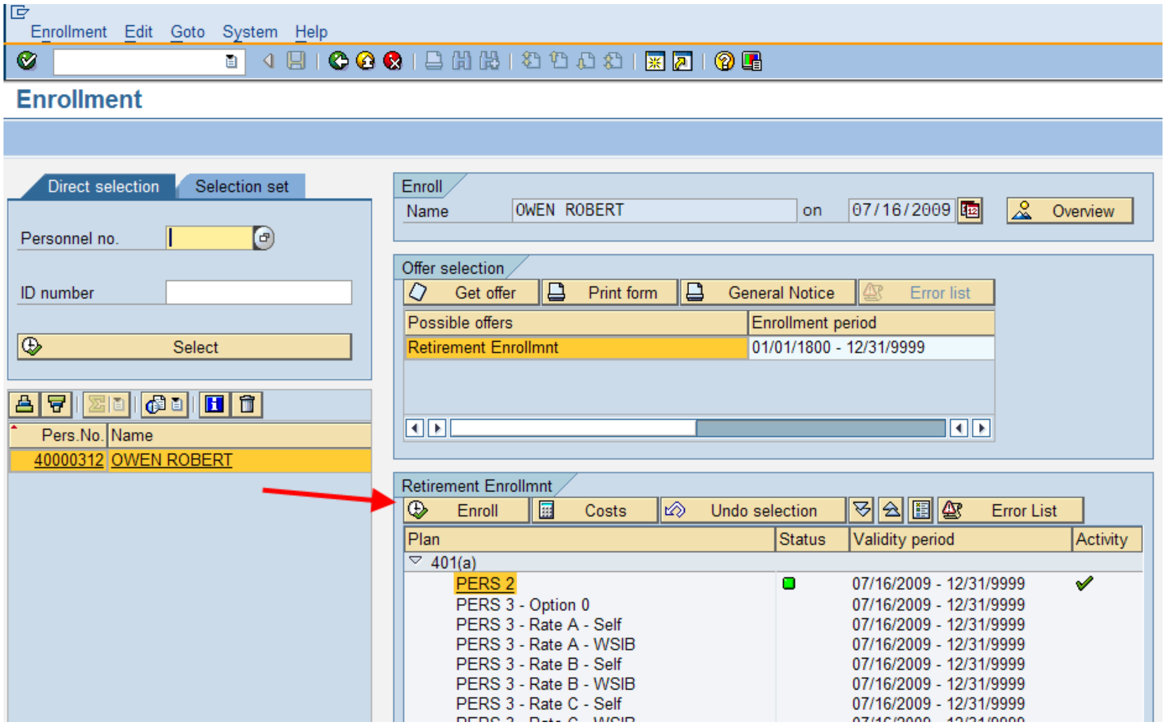
For a Plan 3 employee transferring between employers (business areas), choose the appropriate plan (PERS, TRS, or SERS0 with the rate option of 0 (zero) to begin the 90-day choice period. This will place the employee on the 70-day/90-day default report.



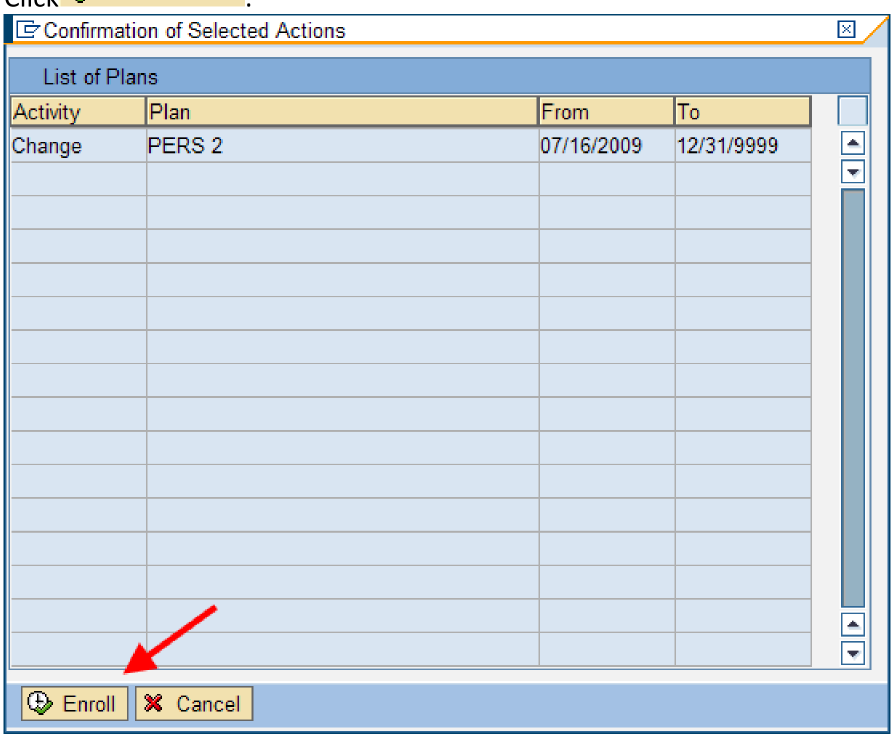
62. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Percentage	R	This is a field used to store a percentage amount for the retirement deduction. **Do not leave the percentage field bank or HRMS will not take any deductions for retirement.** If you do not know the correct plan contribution percentage, HRMS can prompt you. Click in the percentage field and enter any number (example: 2) and press the enter button on your keyboard. You will receive an Error message in the status bar telling you what the correct contribution percentage is for the selected plan. **Example**: 3.89

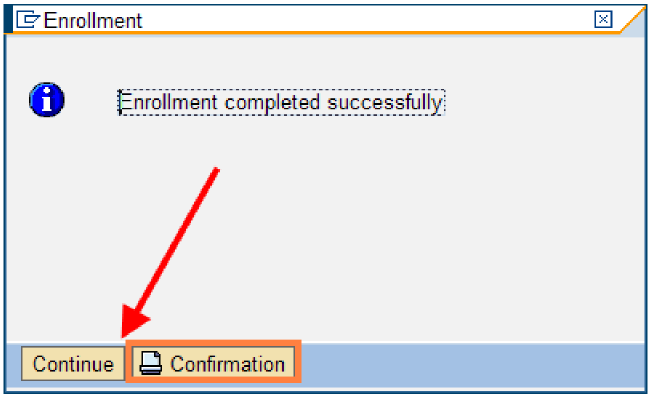
63. Click Accept .



64. Click Enroll.

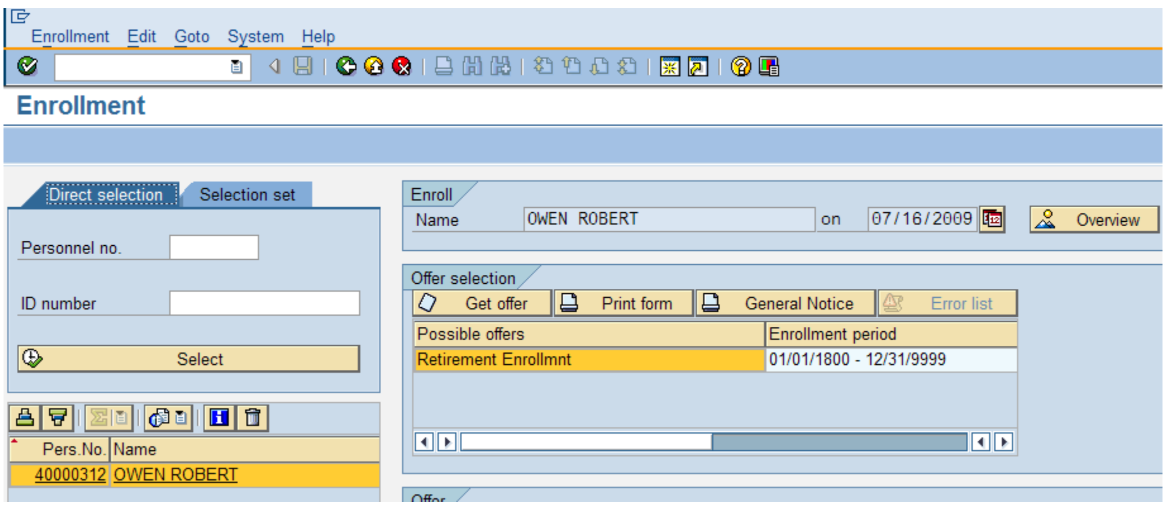


65. Click Enroll.

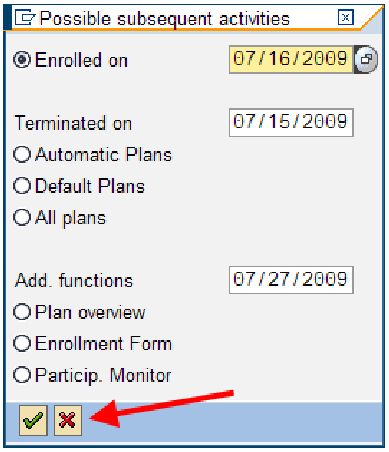


The *Confirmation* button is not configured for use by the State of Washington at this time. However, agencies may use this as a confirmation of enrollment.

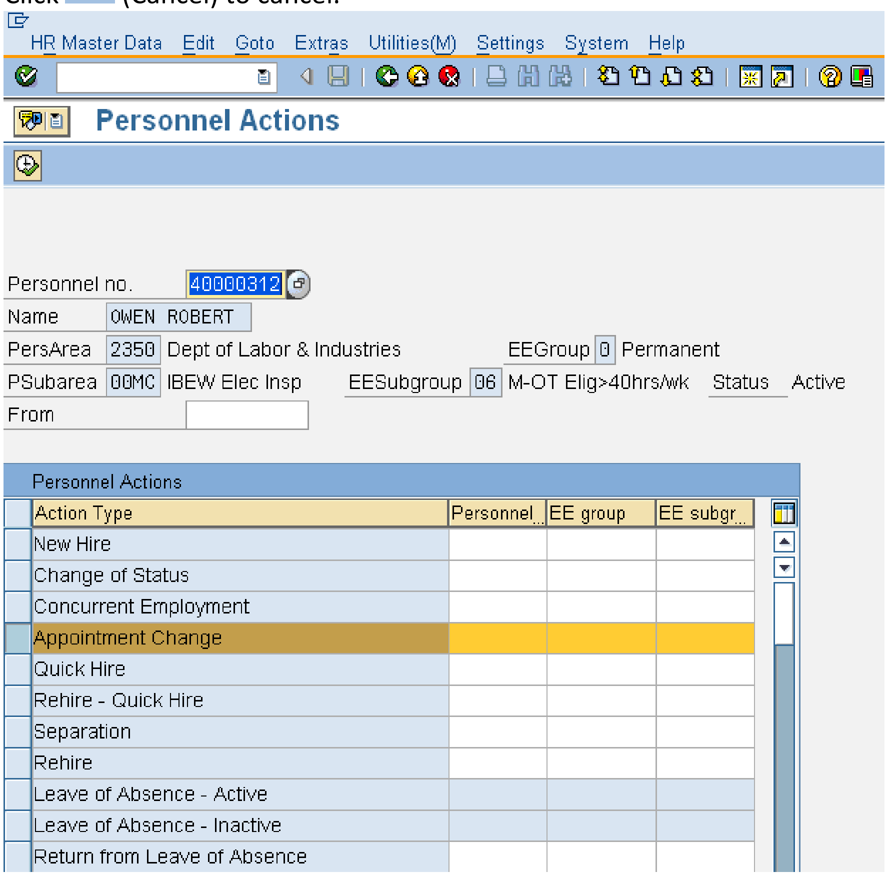
66. Click Continue to continue or click Confirmation to print confirmation.



67. You will be taken back to the Enrollment screen. Click the back icon to return to the previous screen. The Possible subsequent activities window will appear.



68. Click  (Cancel) to cancel.



69. You will be taken back to the Personnel Actions (PA40) screen. You have completed this transaction.

Results
You have successfully transferred an active employee from one position to another position.

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.