HRMS

Concurrent Employment Action (PA40)

Use this procedure to appoint an active employee (using a Reference Personnel Number) into an additional position. You will perform this procedure when an employee is currently employed in a different agency OR in your current agency.

Prerequisites: Employee is active in HRMS. It has been determined that the Hourly Rate Per Assignment procedure cannot be used in lieu of the Concurrent Employment Action. The employee’s current appointment status has been reviewed and the agencies involved have determined which agency will carry the employee’s existing personnel number.

Roles: Personnel Administration Processor and Payroll Processor.

Note: Field definitions can be accessed within HRMS by pressing the “F1” key on the keyboard, or via On Line Quick Reference (OLQR), HRMS Data Definitions Resource Guide, and Glossary.

1. Enter transaction code PA40 in the command field and click the Enter (✓) button or press Enter on the keyboard.

Tips

- The use of “Create” or “Copy” for each infotype within a PA40 process is conditional and determined by the system. There may be some instances where the user procedure will display “Copy” but the employee’s infotype will display “Create,” or the procedure will display “Create” but the employee’s infotype will display “Copy.” The differences are not cause for concern, and are due to whether that infotype existed previously for that employee.
- If the employee is working in the same agency and will be paid hourly in both positions or monthly in both, the agency can use the Hourly Rate Per Assignment in lieu of Concurrent Employment action. Refer to the OLQR user procedure Hourly Rate Per Assignment.
- During a Concurrent Employment Action the employee is assigned another personnel number, called a reference personnel number, for that agency or position. Before creating a new reference personnel number, search for the employee using their Social Security Number (SSN) to display all associated personnel numbers.
2. Complete the following fields:
   
   For Personnel Administration Processors, the following fields are mandatory:
   - **From**

   For Payroll Processors, skip to step **3** in this procedure.

3. Click the box to the left of **Concurrent Employment**.

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**Tips (cont.)**

- If the employee has more than one personnel number, review the employment status for each to determine if an existing record can be updated (rather than creating a new reference personnel number). Information can be found on the current record of the Actions (0000) infotype.
  - A personnel number with a "withdrawn" status can be rehired using the Rehire action.
  - If the employee is active at another agency AND their hiring action was a Quick Hire or Quick Rehire, contact the agency to clarify the employee's status to determine if they are “active.” If it is determined they are not “active,” perform an Appointment Change action using the existing personnel number.

- The employee will receive separate payments and W2s for each personnel number.

- Benefits are not maintained in this action. If the employee is eligible for benefits then those should be maintained manually. Communicate with the other agency on benefits coordination, if applicable.

- Several infotypes are shared between personnel numbers. These infotypes can be updated by both agencies. Shared infotypes are not maintained in this action. The following infotypes are shared:
  - Personnel Data (0002)
  - Addresses (0006)
  - Reference Personnel Number (0031)
  - Bank Details (0009)
  - Family Member Dependents (0021)
  - Education (0022)
  - Additional Personal Data (0077)
  - Military Service (0081)
  - Residence Status (0094)
  - Time Specification/Employ. Period (0552)
4. Click the Enter (✔️) button or press Enter on the keyboard.

5. Click the Execute (溍) button to begin the transaction.

6. Complete the Create Actions (0000) infotype.

The following fields are mandatory:
- Reason for Action
- Position

The following fields will default:
- to
- Action Type
- Employment

7. Click the Enter (✔️) button or press Enter on the keyboard.

**Stop**
- From: only enter the From date if you are the Personnel Administration Processor initiating the concurrent employment action.
- Personnel No.: leave this field blank when starting this action.

**Tips**
- The **Reason for Action** field stores the reason an action has been performed. Refer to the HRMS Data Definition Resource Guide or press F1 in this field for **Reason for Action** definitions.
- The **Reference pers. No.** is the employee's existing personnel number. This creates a link between two personnel numbers. The Reference personnel number is stored in the **Reference Personnel Number (0031)** infotype.
- **Position** is a specific and concrete description of the responsibilities one fulfills in an organization.
8. An information window will appear. Click the Continue (✓) button.

The Personnel Number (Pers. No.) was generated and the following fields defaulted from the position:
- Personnel area
- Employee group
- Employee subgroup

9. Click the Save (✓) button.

Tips
- The system will assign a new Personnel Number for the additional assignment upon pressing the Continue (✓) button.
10. Complete the Create Organizational Assignment (0001) infotype. Most fields will default based on the position’s values.

The following field is mandatory:
- **Contract**

The following fields are optional:
- **Org. Key**
- **Time**

11. Click the Enter (⏎) button or press Enter on the keyboard.

After saving this infotype, the following fields will default based on what is entered on the position’s Address (1028) infotype:
- **UFI**
- **Address 1**
- **Address 2**
- **City**
- **State**
- **Zip Code**
- **County**
- **Country**

12. Click the Save (⏏) button.

**Tips**
- The **Contract** field stores the status of the appointment. Refer to the [HRMS Data Definition Resource Guide](#) or press F1 in this field for **Contract** definitions.
- The UFI (Unique Facility Indicator) Code, Address, City, State, Zip Code, County and Country fields will auto populate upon **Save** (step 12).
- If the Delimit Vacancy box appears, select the appropriate option for your agency's position. This box will only appear if the position's vacancy indicator is marked “Open.”
13. Complete the **Create Contract Elements (0016)** infotype.

The following field is mandatory:
- **Contract Type**

The following field is optional:
- **Probationary Period**

14. Click the **Enter** button or press **Enter** on the keyboard.

15. Click the **Save** button.

16. Complete the **Create Monitoring of Tasks (0019)** infotype.

The following fields will default:
- **Task Type**
- **Date of Task**
- **Processing indicator**

The following fields are optional:
- **Reminder Date**
- **Lead/follow-up time**

17. Click the **Enter** button or press **Enter** on the keyboard.

18. Click the **Save** button.

**Tips**
- The **Contract Type** field stores the employee’s state status. Refer to the [HRMS Data Definition Resource Guide](#) or press F1 in this field for **Contract Type** definitions.
- If the **Probationary Period** field is left blank, the Create Monitoring of Tasks (0019) infotype is skipped. Go to step 19.

**Tips**
- A **Task Type** is a future event or task with a related date of task. Refer to the [HRMS Data Definitions Resource Guide](#) or press F1 in this field for **Task Type** definitions.
- The **Reminder Date** field can be completed by one of the following:
  - Enter a **Reminder Date**, or
  - Enter the **Lead/follow-up time**. The **Reminder Date** field will populate based on what was entered in the **Lead/follow-up time** field, or
  - Leave **Reminder Date** and **Lead/follow-up time** blank. The **Reminder Date** field will populate with a date two months prior to the **Date of Task**.
19. Complete the Create Communication (0105) infotype.

The following field is mandatory:
- System ID

20. Click the Enter (✓) button or press Enter on the keyboard.

21. Click the Save (✓) button.

22. Complete the Create Planned Working Time (0007) infotype.

The following fields are mandatory:
- Work schedule rule
- Time Mgmt status
- Employment percent
- ACA Status Code

The following fields are conditional:
- Part-time employee
- Additional time ID
- Time Type Override

The following fields will default:
- Work schedule rule
- Time Mgmt status
- Employment percent

Tips (Con’t)
- You can run the Task Monitoring Reports (S_PH0_48000450) to get the reminder dates and tasks.
- Only one task can be entered during the concurrent employment action (PA40). If you have more than one task to create for the employee, follow the Monitoring of Tasks – Create and Maintain user procedure located in the OLQR.

Tips
- If you do not know the employee’s work email address at this time, click the “next record button (✓)” to move to the next infotype. Enter the email address as soon as you obtain it by following the Email Address – Communication user procedure located in the OLQR.
23. Click the Enter (Enter) button or press Enter on the keyboard.

24. Click the Save (Save) button.

25. Complete the Create Telework/Flex Work (Employee) (9106) infotype.

The following fields are optional:
- Telework (EE)
- Flextime (EE)
- Compressed Workweek (EE)
- Flex work hours

Tips
- The Work schedule rule will default to FULL. You will need to select the appropriate work schedule if the employee is not on a FULL 5-8s: M-F 8hpd work schedule. Refer to the HRMS Data Definitions Resource Guide or press F1 in this field for Work Schedule Rule definition.
- Time Mgmt status determines how leave accruals are calculated in the time evaluation process. Refer to the HRMS Data Definitions Resource Guide or press F1 in this field for Time Mgmt status definitions.
- The Part-time employee box will be used beginning January 1, 2017 to determine new employee eligibility for auto-enrollment in the DCP. New employees with the Part-time employee box checked will not be automatically enrolled in the DCP. Refer to the HRMS Data Definitions Resource Guide or press F1 in this field for Part-time employee definitions.
- Additional Time ID indicates the type of leave an employee will accrue. Refer to the HRMS Data Definitions Resource Guide or press F1 in this field for Additional Time ID definitions. Work with the other agency to coordinate leave eligibility.
- Employment Percent is the percentage of time an employee is scheduled to work of their Work Schedule Rule. Refer to the HRMS Data Definition Resource Guide or press F1 in this field for Employment Percent definition.
- The ACA Status Code is required for all new hires, rehires and employees who have had change in employment status. Do not leave the default code of “Not Assigned.” Press F1 in this field for additional information and refer to the HRMS Data Definitions Resource Guide for ACA Status Code definitions.
- The Time Type Override 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.
26. Click the Enter (✔) button or press Enter on the keyboard.

27. Click the Save (✔) button.

28. Complete the Check Date Specifications (0041) infotype.

The following Date type fields will default. It is optional to add additional Date types.
- Anniversary Date
- Original Hire Date
- Unbroken Srvc. Date
- Appointment Date
- Seniority Date
- Prsnl HolidayElgblty

For each Date type, the following field is mandatory:
- Date

29. Click the Enter (✔) button or press Enter on the keyboard.

30. Click the Save (✔) button.

Tips
- Refer to the HRMS Data Definitions Resource Guide or press F1 in this field for Telework (EE), Flextime (EE), Start Time, End Time, and Compressed Workweek (EE) definitions.
- HRMS automatically converts entries to the Flex work hours fields to “German Standard” Military Time. If you have someone whose start or end time is midnight, use “24:00:00” rather than 12:00 am. If 12:00 am is entered, it will default to 00:00:00 and you must overwrite the default value with “24:00:00.”

Tips
- The Anniversary Date, Seniority Date, and Unbroken Srvc. Date should be the same for all of the employee’s personnel numbers. You will need to coordinate with the other agency to review those fields and make applicable changes.
- Work with the other agency to coordinate leave and personal holiday eligibility; and make any necessary adjustments to those Date Types and Dates.
- The Date field for each Date type will default to the hire date, but you may change it.
- In HRMS, you are limited to 12 date types for each record.
31. Complete the Create Basic Pay (0008) infotype.

The following field is mandatory:

- **Reason**

The following fields are conditional:

- **Cap.util.lvl**
- **WkHrs/period**
- **Next Inc.**
- **Level**
- **Ann. salary**
- **Wage Type**

### Tips

- For field definitions and additional coding tips for **Reason**, **Cap.util.lvl**, **WkHrs/period**, **Ann.salary**, **Ind.val.**, **Next inc.**, and **PS Area**, refer to the [HRMS Data Definitions Resource Guide](#) or press F1 in these fields.
- **Cap.util.lvl** is the percentage an employee is scheduled to work of a full-time schedule.
- **WkHrs/period** is the average number of hours an employee works in one payroll period based on 2,088 full-time working hours in a calendar year.
- **Cap.util.lvl** and **WkHrs/period** should be aligned.
- **Next Inc.** is the date an employee is scheduled to move to a higher salary step within the salary range of their current job class. This field is used as an override when there are exceptions to the rules built into the system, or if an agency prefers to manually enter this date.
- **Ind.val.** indicates whether an employee’s pay is indirectly valued or directly valued.
  - Indirectly valued pay is derived from a salary schedule table and will automatically update when salary schedule tables are changed.
  - Directly valued pay is manually entered into the **Ann.salary** or wage type amount fields.
- The employee’s basic pay information will default based on the position’s **Planned Compensation (IT1005)** infotype.
32. Click the **Enter (✓) button** or press **Enter** on the keyboard.

33. Click the **Save (☐) button**.

34. Click the **Exit (☐) button** to exit the action.

35. The **Payroll Processor** will continue the Concurrent Employment Action from this point on. They will start the transaction using the menu path or the transaction code **PA40**.

36. Enter the employee’s Personnel Number in the **Personnel no.** field and click the **Enter (✓) button** or press **Enter** on the keyboard.

37. Click the box to the left of **Concurrent Employment**.

38. Click the **Execute (✓) button** to begin transaction.

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**Tips (Con’t)**

- **The wage type will default based on the employee's Employee Subgroup.** Wage type 1003 is used for monthly, wage type 1001 is used for hourly, and wage Type 1006 is used for daily. Enter the correct wage type if the field is blank.
- You can also enter wage types for **Shift Difference** and **Assignment Pay**.

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**Caution**

- For the **Personnel Administration Processor**, this will mark the end of the Concurrent Employment Action. After saving, click the exit (☐) button and transfer the Concurrent Employment Action Information Packet to the **Payroll Processor** who will continue the action.

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Do not enter a From date
39. Click the **Execute info group** button on the **Change Actions (0000)** infotype.

40. Click **Continue** in the **Execute info group** dialog box.

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**Tip**
- The Personnel Administration Processor has already saved this infotype so it is okay to continue.
41. Click the Next Record button until you reach the Create Recurring Payments/Deduction (0014) infotype.

42. Complete the Create Recurring Payments/Deductions (0014) infotype.
   The following fields are mandatory:
   - Wage Type
   - Amount
   - Payment model

43. Click the Enter button or press Enter on the keyboard.

44. Click the Save button.

45. Complete the Create Unemployment State (0209) infotype.
   The following fields are mandatory:
   - Tax authority
   - Worksite

46. Click the Enter button or press Enter on the keyboard.

47. Click the Save button.
48. Complete the **Create Withholding Info W4/W5 US (0210)** infotype.

The following fields are mandatory:
- **Filing Status**

The following fields are optional:
- **Allowances**
- **Add. withholding**

The following field will default:
- **Tax exempt Ind.**

49. Click the **Enter** button or press **Enter** on the keyboard.

50. Click the **Save** button.

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### Tips

- **Filing Status, Allowances, Tax Exempt Ind., and Add. withholding:** these fields should be completed based on the employee's W-4 form.
- **Allowances:** this field will default to 0 allowances if left blank.
- **Tax Exempt Ind.:** this field determines if the employee is exempt from taxation. The field will default to **Not exempt.**
- Using the **Tax Exemption indicator “Y”** will make the wages exempt from taxation and not reportable to the IRS.
- Using the **Tax Exemption indicator “R”** will make the wages exempt from taxation and earnings reportable to the IRS.
The following field is mandatory:
- **Empl. override group**

52. Click the Enter button or press Enter on the keyboard.

53. Click the Save button.

54. You have successfully completed the Concurrent Employment Action procedure.

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**Tips**
- **Empl. override group** is the Worker’s Compensation code that an employee holds for a particular job.
- Click on the matchcode to display all **Empl. override group**.
- The **employee override group** must match your agency Business Area. For this example, the employee has been hired into Business Area 1000 – Office of the Attorney General.
- If the numbers do not match, it could cause incorrect amounts of Medical Aid being withheld from your employee.