

HRMS

New Hire Action – Previous State Employee (PA40)

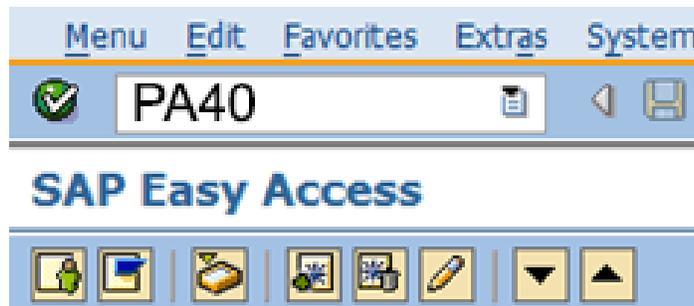
Use this procedure to hire a former state employee who was not converted into HRMS.

Prerequisites: The employee already has an assigned personnel number from the Data Warehouse – Contact the WaTech Support center (360) 586-1000 or 855-WaTech1 or support@WaTech.wa.gov to get the employee’s personnel ID number.

Roles: Personnel Administration Processor, Payroll Processor, and Benefits 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

- Verify the new employee’s Social Security Number does not already exist within HRMS. If the Social Security Number already exists, follow the *Re-Hire Action* user procedure located in the [OLQR](#) instead.
- This procedure may 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.
- It is critical if a hand-off is made to another role, that the transaction code **PA40** is used and the **Execute info group** () process is used. This is explained further in this process. Using PA40 will ensure that all required infotypes are completed.
- Do not use the Transaction code PA30 to complete portions of the new hire action.

New Hire Action – Previous State Employee (PA40) (cont.)

2. Complete the following fields:

For Personnel Administration Processors, the following fields are mandatory:

- **Personnel no.**
- **From**

For Payroll Processors, skip to **step 54** in this procedure.

For Benefits Processors, skip to **step 80** in this procedure.

3. Click the box to the left of **New Hire**.

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

5. Click the **Execute** (⏏) 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.

The screenshot shows the 'Personnel Actions' window in HR Master Data. The 'Find by' section is set to 'Person' with 'Personnel no.' 40000639 and 'From' 10/15/2016. The 'Personnel Actions' list shows 'New Hire' selected. The table below is a summary of the actions:

Action Type	Personnel...	EE group	EE subg...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			



Stop

- **From:** only enter the From date if you are the **Personnel Administration Processor** initiating the new hire action.
- **Personnel no.:** enter the employee's assigned personnel number. This will prevent the system from generating a new personnel number.

The screenshot shows the 'Create Actions (0000)' infotype form. The 'Pers.No.' is 40000639, 'Start' is 10/15/2016, and 'to' is 12/31/9999. The 'Personnel action' section has 'Action Type' set to 'New Hire' and 'Reason for Action' set to '02'. The 'Organizational assignment' section has 'Position' set to '71047850'. The 'Status' section has 'Employment' set to 'Active'. The 'Additional actions' table is empty.

Start Date	Act.	Action Type	ActR	Reason for action



Tips

- The **Reason for Action** field stores the reason an action has been performed. Refer to the [HRMS Data Definitions Resource Guide](#) or press **F1** in this field for **Reason for Action** definitions.
- **Position** is a specific and concrete description of the responsibilities one fulfills in an organization.

New Hire Action – Previous State Employee (PA40) (cont.)

- 8.** An information window will appear. Click the **Continue** (✔) button.

The following fields defaulted from the position:

- Personnel area
- Employee group
- Employee subgroup

- 9.** Click the **Save** (💾) button.

- 10.** Complete the **Create Personal Data (0002)** infotype.

The following fields are mandatory:

- Last Name
- SSN
- Date of Birth
- Gender
- Marital Status

The following field is optional:

- First name

- 11.** Click the **Enter** (✔) button or press **Enter** on the keyboard.

- 12.** Click the **Save** (💾) button.

Information window with a blue header and a close button. It contains an information icon and the text "Default values are used by the position". At the bottom right, there is a green checkmark icon and a help icon.

Create Actions (0000) form with a blue header and a "Change info group" button. It contains the following fields:

- Pers.No.: 40000639
- Start: 10/15/2016 to 12/31/9999
- Personnel action section:
 - Action Type: New Hire (dropdown)
 - Reason for Action: 02 Probationary
 - Reference Pers. Nos.: (empty)
- Status section:
 - Employment: Active (dropdown)
- Organizational assignment section:
 - Position: 71047850 HR Manager
 - Personnel area: 1630 Consolidated Technology Svcs
 - Employee group: 0 Permanent
 - Employee subgroup: 06 M-OT Elig>40hrs/wk
- Additional actions table:

Start Date	Act.	Action Type	ActR	Reason for action

Create Personal Data (0002) form with a blue header and a "Change info group" button. It contains the following fields:

- Personnel No.: 4000063
- Status: Active
- Start: 10/15/2016 To 12/31/9999
- Name section:
 - Title: Ms. (dropdown)
 - Last name: Gray
 - First name: Nina
 - Middle name: (empty)
 - Nickname: (empty)
 - Suffix: (dropdown)
 - Name: Gray Nina
- HR data section:
 - SSN: 302-77-5572
 - Date of Birth: 11/08/1988
 - Marital Status: Single (dropdown)
 - Gender: Female (radio button selected), Male (radio button)
 - Since: (empty)

New Hire Action – Previous State Employee (PA40) (cont.)

13. 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**

14. 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**

15. Click the **Save** (💾) button.

Create Organizational Assignment (0001)

Org Structure

Personnel No. 4000063

Start 10/15/2016 to 12/31/9999 Status Active

Enterprise structure

CoCode WA01 STATE OF WASHINGTON

Pers.area 1630 Consolidated Technology S... Subarea 0001 Non Represented

Cost Ctr 1630000000 DEFAULT AGENCY... Bus. Area 1630 Consolidated Technology ...

Fund

Personnel structure

EE group 0 Permanent Payr.area 11 Semi-monthly

EE subgroup 06 M-OT Elg>40hrs/wk Contract Probationary

Organizational plan

Percentage 100.00 Assignment

Position 71047850 RTR1

Job key 51000796 119F

Exempt N HUMAN RESOURCE C...

Org. Unit 31008154 163 Consolidated Technol...

Org.key

Administrator

PersAdmin

Time

PayrAdmin

Duty Station Address (Inherited from Position Address)

UFI

Address 1

Address 2

City

State

Zip Code

County

Country

Tips

- The **Contract** field stores the status of the appointment. Refer to the [HRMS Data Definitions 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 15)**.
- 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."

New Hire Action – Previous State Employee (PA40) (cont.)

16. Complete the **Create Contract Elements (0016)** infotype.

The following field is mandatory:

- **Contract Type**

The following field is optional:

- **Probationary Period**

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

18. Click the **Save** (💾) button.

19. 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**

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

Create Contract Elements (0016)

Maintain activities

Personnel No. 4000063 Name Gray Nina

PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 10/15/2016 to 12/31/9999

Contractual regulations

Contract Type Non-Permanent

Periods

Probationary Period 6 Months

Tips

- The **Contract Type** field stores the employee's state status. Refer to the [HRMS Data Definitions 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 22**.

Create Monitoring of Tasks (0019)

Maintain activities

Personnel No. 4000063 Name Gray Nina

PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Task

Task Type Prob Period End Date

Date of Task 04/15/2017 Processing indicator New task

Reminder

Reminder Date 04/08/2017

Lead/follow-up time [For specific task type]

Tips

- The **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**.

New Hire Action – Previous State Employee (PA40) (cont.)

21. Click the **Save** (📁) button.

22. Complete the **Create Addresses (0006)** infotype.

The following fields will default:

- **Address type**
- **Country Key**

The following fields are mandatory:

- **Address Type**
- **Street and House No.**
- **Postal Code/City**
- **Office/region**
- **County code**

The following field is optional:

- **Telephone Number**
- **Communication 1**
- **Communication 2**
- **Communication 3**
- **Communication 4**

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

24. Click the **Save** (📁) button.

25. Complete the **Create Communication (0105)** infotype.

The following field is mandatory:

- **System ID**

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 new hire 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](#).

Create Addresses (0006)

Foreign address

Personnel No. 4000063 Name Gray Nina

PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 10/15/2016 to 12/31/9999

Address

Address type Permanent residence

Street and House No. 211 Solitude Drive

2nd Address Line

Postal Code/City 98512 Tumwater

Country Key USA

Office/region WA Washington

County code 34 Thurston County

Telephone Number 360-555-1212

Communication

Communication 1	<input type="checkbox"/>	
Communication 2	<input type="checkbox"/>	
Communication 3	<input type="checkbox"/>	
Communication 4	<input type="checkbox"/>	

Tips

- Select Mailing address or Permanent residence from the **Address Type** drop down list. If the employee provides a permanent residence and mailing address you can only complete one type during the New Hire Action. To enter another address type follow the *Addresses* user procedure located in the [OLQR](#).

Create Communication (0105)

Personnel No. 4000063 Name Gray Nina

PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 10/15/2016 to 12/31/9999

Communication

Type 0010 E-mail

System ID NINA.GRAY@WATECH.WA.GOV

New Hire Action – Previous State Employee (PA40) (cont.)

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

27. Click the **Save** (💾) button.

28. 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

- If you do not know the employee's work email address at the time of the new hire, click the "**next record button** (⏪)" to move to the next infotype. Then enter the email address as soon as you obtain it by following the *Email Address – Communication* user procedure located in the [OLQR](#).

Create Planned Working Time (0007)

Work schedule

Personnel No. 4000063 Name Gray Nina

PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 10/15/2016 To 12/31/9999

Work schedule rule

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

Time Mgmt status 9 - Time evaluation of planned times

Part-time employee Additional time ID 00

Working time

Employment percent	100.00	<input type="checkbox"/> Dyn. daily work schedule
Daily working hours	8.00	Min. <input type="text"/> Max. <input type="text"/>
Weekly working hours	40.00	Min. <input type="text"/> Max. <input type="text"/>
Monthly working hrs	174.00	Min. <input type="text"/> Max. <input type="text"/>
Annual working hours	2080.00	Min. <input type="text"/> Max. <input type="text"/>
Weekly workdays	5.00	

Additional fields

ACA Status Code Y1 Average 130 Hrs or more per month

Time Type Override No Override

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** 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** for **Part-time employee** definitions.

New Hire Action – Previous State Employee (PA40) (cont.)

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

30. Click the **Save** (📁) button.

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

The following fields are optional:

- **Telework (EE)**
- **Flextime (EE)**
- **Compressed Workweek (EE)**
- **Flex work hours**

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

33. Click the **Save** (📁) button.

Tips (Con't)

- **Additional Time ID** indicates the type of leave the employee will accrue. Refer to the [HRMS Data Definitions Resource Guide](#) or press **F1** for **Additional Time ID** definitions.
- **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.

Create Telework/Flex Work (Employee) (9106)

Personnel No. Name

PersArea Consolidated Technology Svcs EEGroup Permanent

PSubarea Non Represented EESubgroup M-OT Elig>40hrs/wk Status

Start To

Telework/Flex Work (Employee)

Telework (EE) EE Participating: 1-2 days every two weeks

Flextime (EE) EE Participating Flex work hours to

Compressed Workweek (EE) EE Participating

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.”

New Hire Action – Previous State Employee (PA40) (cont.)

34. Select the proper level of education and click on the **Copy** (✓) button.

35. Complete the **Create Education (0022)** infotype.

The following fields are mandatory:

- **Start**
- **to**
- **Education/training**
- **Institution/location**
- **Certificate**

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

37. Click the **Save** (📁) button.

EE	Educ. est. text
01	High School or GED
02	Voc School w/o HS
03	Voc. or Bus. School
04	Some College-2Qtrs+
05	AA Degree
06	Col Grad 4 Yr Degree
07	Some Grad Work
08	MA/MS/MSW Degree
09	Other Master Degree



Tips

- **Create Education (0022)** infotype can be skipped by clicking (close) to close the window. Go to **step 38**.

Create Education (0022)

Personnel No. 4000063 Name Gray Nina

PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 09/01/1996 to 06/30/1998

Educational est. 08 MA/MS/MSW Degree

Education/training Public Administration

Institute/location The Ohio State University / Columbus OH

Country Key USA

Certificate 16



Tips

- **Start:** enter in the start date of the employee's education or training.
- **to:** enter in the end date of the employee's education or training.

New Hire Action – Previous State Employee (PA40) (cont.)

38. Complete the **Change 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**

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

40. Click the **Save** (💾) button.

Change Date Specifications (0041)

Personnel No. 4000063
Name Gray Nina

PersArea 1630 Consolidated Technology Svcs
EEGroup 0 Permanent

PSubarea 0001 Non Represented
EESubgroup 06 M-OT Elig>40hrs/wk
Status Active

Start 10/15/2016 to 12/31/9999
Chng 09/14/2016 CINDYC

Date Specifications			
Date type	Date	Date type	Date
01 Anniversary Date	10/15/2016	02 Appointment Date	10/15/2016
03 Original Hire Date	10/15/2016	05 Seniority Date	10/15/2016
07 Unbroken Srvc. Date	10/15/2016	09 Vac Lv Frozen UpTo	04/14/2017
10 Sick Lv Frozen UpTo	04/14/2017	18 Prsnl HolidayElgblty	10/15/2016



Tips

- The **Date** field for each **Date type** will default to the new hire date, but you may change it.
- In HRMS, you are limited to 12 date types for each record.
- The **Prsnl Holiday/Elgblty (18)** date type is the date an employee is eligible to take a personal holiday. The **Prsnl Holiday/Elgblty** will default to the new hire date. If the employee is not eligible to take a personnel holiday when they start employment, you will need to change the date to when they are eligible.
- Personal Holiday quotas are only created by the system at the end of the calendar year and available to use at the beginning of the next year. Employees who are hired after the beginning of the year and are entitled to a Personal Holiday will need to have their quota entered manually. See the [Quota Generate Accruals Manually](#) user procedure located in the [OLQR](#).
- If you would like to indicate the date the employee will be eligible to take vacation leave, complete the Date type and Date field as follows:
 - **Date type** – enter **Vac Lv Frozen Up To (09)**
 - **Date** – enter the first day the employee is eligible to begin using vacation leave.
 - By entering this Date type, HRMS will prevent the use of vacation leave prior to the eligibility date.

New Hire Action – Previous State Employee (PA40) (cont.)

41. Complete the Create Additional Personal Data (0077) infotype.

The following fields are optional:

- Ethnic origin
- Ethnicity (New)
- Race Data
- Military status
- Veteran Status
- Disability

The following field is conditional:

- Exempt from EEO

Create Additional Personal Data (0077)

Personnel No. Name

PersArea Consolidated Technology Svcs EEGroup Permanent

PSubarea Non Represented EESubgroup M-OT Elig>40hrs/wk Status Active

Start To

Additional Personal Data

Ethnic origin

Ethnicity(New)

Race Data

Race Category

American Indian/Alaskan Native

Asian

Black or African American

Native Hawaiian or Other Pac Islander

White

Military status

Exempt from EEO

Veteran Status

Discharge Date

Special Disabled Veteran

Vietnam Era Veteran

Other Protected Veteran

Recently Separated Veteran

Armed Forces Service Medal Veteran

Disabled Veteran

Not a Protected Veteran

Prefers Not to Answer

Non Veteran

Disability

Status

Disability Date

Date Learned



Caution

- When **Ethnic Origin** and **Ethnicity (New)** fields are both populated, HRMS displays a warning message “**Ethnicity (New) field maintained thus Ethnic origin field is disregarded**”. Ignore this message. This is a standard SAP warning message and does not apply to the State of Washington.
- In the **Race Data** group, click the checkbox to the left of the appropriate **Race Category** to select. If multiple races are selected, the system will prompt you to also check the “**Two or More Races**” box. Do not check “**Two or More Races**” by itself.

New Hire Action – Previous State Employee (PA40) (cont.)

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

43. Click the **Save** (📁) button.

44. Complete the **Create Military Service (0081)** infotype.

The following field is mandatory:

- **Service type**

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

46. Click the **Save** (📁) button.

47. Complete the **Create Time Specification/Employ. Period (0552)** infotype.

The following fields are mandatory:

- **Start**
- **To**

The following **Imputable period** fields are optional:

- **Years**
- **Months**
- **Days**

Tips (Con't)

- The option “(X) **Has a Disability (or previously had one)**” should only be used for employees with a current disability. Do not use this option for employees who previously had a disability since they no longer meet the definition. Use “(N) **Does not Have a Disability**”.
- For field definitions and additional coding tips for the **Create Additional Personal Data (0077)** infotype, refer to the [HRMS Data Definition Resource Guide](#) and the [Additional Personal Data Job Aid](#).

Create Military Service (0081)

Personnel No. 4000063 Name Gray Nina

PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elg>40hrs/wk Status Active

Start 10/15/2016 To 12/31/9999

Military/non-military service

Service type 02 United States Navy

Tips

- **Create Military Service (0081)** infotype will only appear if a **Military Status**, other than **Non/Unspec Vet's Status**, was chosen on the **Additional Personal Data (0077)** infotype in the previous step.
- Skip to **step 50** if **Military status** selection was blank or **Non/Unspec Vet's Status**.

Create Time Specification/Employ. Period (0552)

Personnel No. 4000063 Name Gray Nina

PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elg>40hrs/wk Status Active

Start 10/14/2001 To 10/13/2008 Chng 09/14/2016 CINDYC

Time specifications/employment period

Time spec. DE08 Military service / non-military service

Do not evaluate

Duration of validity period		Imputable period	
Years	7	Years	
Months	0	Months	
Days	0	Days	

New Hire Action – Previous State Employee (PA40) (cont.)

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

49. Click the **Save** (💾) button.

50. 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

- **Start:** enter the start date of employee's military service. This should match what is on the employee's DD214 paperwork.
- **To:** enter the end date of the employee's military service. This should match what is on the employee's DD214 paperwork.
- The **Duration of validity period** fields will automatically calculate based upon dates entered in the **Start** and **To** fields when you press (✓) enter.
- **Imputable period:** enter the **Years, Months, and Days** from the employee's DD214 paperwork. They may be different from the Years, Months, and Days in the Duration of validity period section. HRMS calculations are different from the Military's.

Create Basic Pay (0008)

Salary amount Payments and deductions

Personnel No. 4000063 Name Gray Nina

PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 10/15/2016 to 12/31/9999

Subtype 0 Basic contract

Pay scale

Reason 19 Initial/Rehire Appointme... Cap.util.lvl 100.00

PS type 00 Non-Represented WkHrs/period 87.00 Semi-monthly

PS Area 01 Standard Progression Next inc. 04/15/2017

PS group 50 Level L Ann.salary 55,728.00 USD

Wage Type	Wage Type Long Text	Operation ind.	Amount	Currency	Ind.val.	Add to total amount	Number/Unit	Unit
1003	Pay Period Salary		2,322.00	USD		<input checked="" type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		

IV 10/15/2016 - 12/31/9999 2,322.00 USD

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.

New Hire Action – Previous State Employee (PA40) (cont.)

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

52. Click the **Save** (💾) button.

53. Click the **Exit** (🚪) button to exit the action.

54. The **Payroll Processor** will continue the New Hire Information from this point on. They will start the transaction using the menu path or the transaction code **PA40**.

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

56. Click the box to the left of **New Hire**.

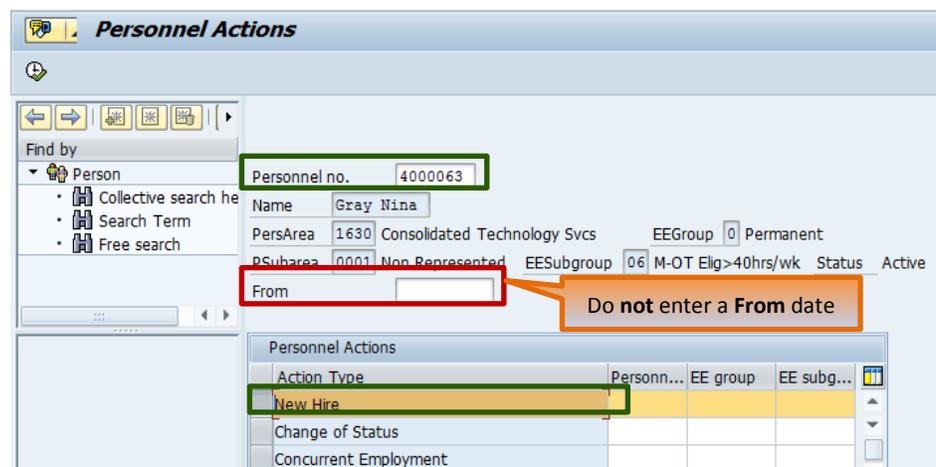
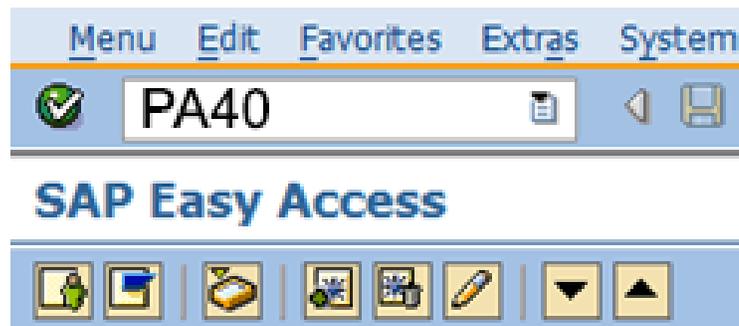
57. Click the **Execute** (⏸) button to begin transaction.

📘 Tips (Con't)

- **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 the 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 employee's position **Planned Compensation (IT1005)** infotype.
- 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**.

⚠ Caution

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



✖ Stop

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

New Hire Action – Previous State Employee (PA40) (cont.)

58. Complete the **Change Actions (0000)** infotype.

59. Click **Execute info group** button.

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

61. Click the **Next Record** () button until you reach Subtypes for infotype **Education**.

62. Click the **Close** () button to by-pass this infotype.

63. Continue to click the **Next Record** () button until you reach the **Create Bank Details (0009)** infotype.

64. Complete the **Create Bank Details (0009)** infotype.

The following field is mandatory:

- **Payment Method**

The following fields are optional:

- **Bank Key**
- **Bank Account**
- **Bank control key**

Change Actions (0000)

 Change info group

Pers.No.
 Name
 PersArea Consolidated Technology Svcs EEGroup Permanent
 PSubarea Non Represented EESubgroup M-OT Elig>40hrs/wk Status Active
 Start to Chng CINDYC

Personnel action
 Action Type
 Reason for Action Probationary

Status
 Employment

Organizational assignment
 Position HR Generalist
 Personnel area Consolidated Technology Svcs
 Employee group Permanent
 Employee subgroup M-OT Elig>40hrs/wk

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action
10/15/2016	U0	New Hire	02	Probationary

Execute info group

 Warning: Personnel action infotype not saved with 'execute info group' function!

Create Bank Details (0009)

Personnel No. Name
 PersArea Consolidated Technology Svcs EEGroup Permanent
 PSubarea Non Represented EESubgroup M-OT Elig>40hrs/wk Status Active
 Start to Chng CINDYC

Bank details

Bank details type
 Payee
 Postal Code/City Tumwater
 Bank Country
 Bank Key WASHINGTON STATE EMPL...
 Bank Account Bank control key
 Payment method Bank transfer (ACH)
 Purpose
 Payment currency United States Dollar

New Hire Action – Previous State Employee (PA40) (cont.)

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

66. Click the **Save** (💾) button.

67. Complete the **Create Recurring Payments/Deductions (0014)** infotype.

The following fields are mandatory:

- **Wage type**
- **Amount**
- **Payment model**

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

✘ Stop

- You must save the **Bank Details (0009)** infotype to accept the default of warrant. If you do not save this infotype, the employee will red line on payroll reports and will not process through payroll until the **Bank Details (0009)** infotype is created and saved.

ℹ Tips

- **Bank control key** is the type of bank account. Use “01” for Checking or “02” for Savings.
- **Payment method** is how the employee is paid. Use “C” for Warrant or “D” for Bank Transfer (ACH).
- If the employee has completed the direct deposit form identifying where they would like their pay check deposited complete the **Bank Key, Bank Account, Bank control key, and Payment method** fields.
- To search for banks when entering direct deposit, click the matchcode in the Bank Key field to open the Find Bank Window.
 - To search by bank name: type a portion of the bank name, followed by an asterisk (*) in the Bank name field –for example, Washington*.
 - To search by City: type an asterisk (*), a portion of the city name, followed by another asterisk (*) in the City field. –for example, *Olympia*.
 - Click ✓ (continue) to accept and display a list of banks matching the criteria. Click ✓ (copy) to accept.

Create Recurring Payments/Deductions (0014)



Personnel No. 4000063 Name Gray Nina
PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent
PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active
Start 10/15/2016 to 12/31/9999

Recurring Payments/Deductions

Wage Type 1169 Tuition Reimb Non Taxable

Amount 200.00 USD Ind. Val. Semi-monthly

Number/unit

Assignment Number

Reason for Change

Payment dates

Payment model WA04 Every Pay Period - Full Amt

ℹ Tips

- If the employee has Recurring Deductions, complete the screen. If no information has been provided for recurring payments or deductions, skip this infotype by clicking the **Next Record** (⏩) button.

New Hire Action – Previous State Employee (PA40) (cont.)

69. Click the **Save** (📁) button.

70. Complete the **Create Unemployment State (0209)** infotype.

The following fields are mandatory:

- **Tax authority**
- **Worksite**

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

72. Click the **Save** (📁) button.

73. Complete the **Create Withholding Info W4/W5US (0210)** infotype.

The following fields are mandatory:

- **Filing Status**

The following field is optional:

- **Allowances**
- **Add. withholding**

The following field is conditional:

- **Tax exempt Ind.**

Tips (Con't)

- During the **New Hire Action**, only one Recurring Payment/Deduction can be created. If the employee has multiple Recurring Payments/Deductions, after you have completed the **New Hire** action, go to **PA30** to create additional Recurring Payment/Deductions. Refer to the *Recurring Payment/Deduction* user procedure located in the [OLQR](#).

Create Unemployment State (0209)

Personnel No. Name
 PersArea Consolidated Technology Svcs EEGGroup Permanent
 PSubarea Non Represented EESubgroup M-OT Elig>40hrs/wk Status
 Start to

Unemployment data

Tax authority	<input type="text" value="WA"/>	Washington
Worksite	<input type="text" value="34"/>	Thurston County

Create Withholding Info W4/W5 US (0210)

Personnel No. Name
 PersArea Consolidated Technology Svcs EEGGroup Permanent
 PSubarea Non Represented EESubgroup M-OT Elig>40hrs/wk Status
 Start to

Status

Tax authority	<input type="text" value="FED"/>	Federal	Tax level	<input type="text" value="A"/>	Federal
Filing Status	<input type="text" value="01"/>	Single			

Exemptions

Allowances	<input type="text" value=""/>	
Tax Exempt Ind.	<input type="text" value="Not exempt"/>	<input type="checkbox"/> IRS mandates
<input type="checkbox"/> Foreign Earned Income		

Withholding adjustments

Add.withholding	<input type="text" value="100.00"/>	USD	<input type="checkbox"/> Non-resident tax calculation
Default formula	<input type="text" value="01"/>	PCT MTHD-RES. U	Alternative formula <input type="checkbox"/>

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

New Hire Action – Previous State Employee (PA40) (cont.)

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

75. Click the **Save** (💾) button.

76. Complete the **Create Add. Withh. Info. Us (0234)** infotype.

The following field is mandatory:

- **Empl.override group**

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

78. Click the **Save** (💾) button.

79. Click the **Exit** (🚪) button to exit this action.

Tips

- The **Filing Status, Allowances, Tax Exempt Ind., and Add.withholding** fields should be completed based on the employee's W-4 form.
- The **Allowances** field will default to 0 allowances if left blank.
- The **Tax Exempt Ind.** 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.

Create Add. Withh. Info. US (0234)



Personnel No. 4000063 Name Gray Nina
 PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent
 PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active
 Start 10/15/2016 to 12/31/9999

Overrides

Tax authority FED Federal Tax level A Federal
 Supplemental method
 Override amount
 Override percentage No Tax
 Empl.override group 0513 1630-5300-00 Admin Field Personnel

Common Paymaster

Common Paymaster

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 1630 – Consolidated Technology Services.
- If the numbers do not match, it could cause incorrect amounts of Medical Aid being withheld from your employee.

Caution

- For the **Payroll Processor**, this will mark the end of the New Hire action. After saving, click (🚪) to exit the action and transfer the New Hire Information Packet to the **Benefits Processor** who will continue the action.

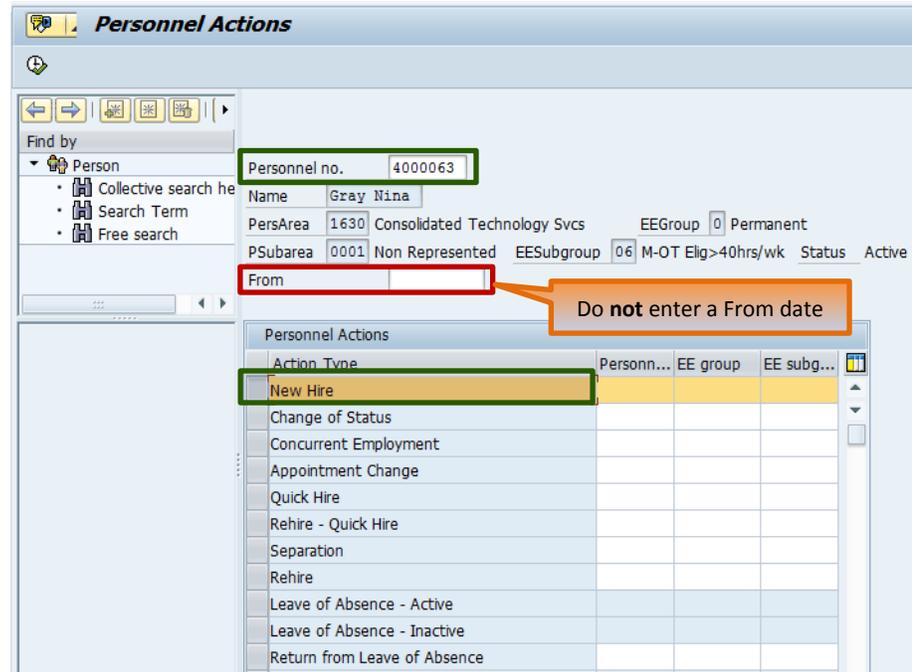
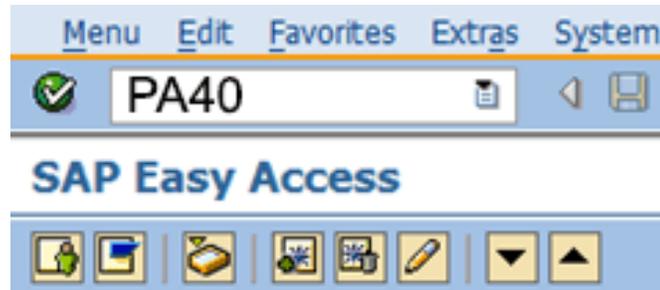
New Hire Action – Previous State Employee (PA40) (cont.)

80. The *Benefits Processor* will continue the New Hire Information from this point on. They will start the transaction using the menu path or the transaction code **PA40**.

81. Enter the employee's personnel number in the **Personnel no.** field and press the **Enter** (↵) button or press **Enter** on the keyboard.

82. Click the box to the left of **New Hire**

83. Click the **Execute** (⏏) button to begin transaction.



⊗ Stop

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

New Hire Action – Previous State Employee (PA40) (cont.)

84. Complete the **Change Actions (0000)** infotype.

85. Click **Execute info group** button.

Change Actions (0000)

 Change info group

Pers.No. 4000063
Name Gray Nina
PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent
PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active
Start 10/15/2016 to 12/31/9999 Chng 09/08/2016 CINDYC

Personnel action
Action Type New Hire
Reason for Action 02 Probationary

Status
Employment Active

Organizational assignment
Position 71047850 HR Generalist
Personnel area 1630 Consolidated Technology Svcs
Employee group 0 Permanent
Employee subgroup 06 M-OT Elig>40hrs/wk

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action
10/15/2016	U0	New Hire	02	Probationary

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

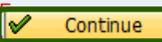
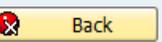
87. Click the **Next Record** () button until you reach Subtypes for infotype **Education**.

88. Click the **Close** () button to by-pass this subtype.

89. Continue to click the **Next Record** () button until you reach the **Create General Benefits Information (0171)** infotype.

Execute info group

 Warning: Personnel action infotype not saved with 'execute info group' function!

New Hire Action – Previous State Employee (PA40) (cont.)

90. Complete the **Create General Benefits Information (0171)** infotype.

The following fields are mandatory:

- **1st Program Grouping**
- **2nd Program Grouping**

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

92. Click the **Save** (💾) button.

93. Click the **Continue** (✓) button on the **Possible subsequent activities** dialog box to begin the Enrollment process.

Create General Benefits Information (0171)

Personnel No. 4000063 Name Gray Nina

PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 10/15/2016 to 12/31/9999

General Benefits Information

Benefit area	US	USA
1st Program Grouping	ELIG	Eligible for Rtrmnt
2nd Program Grouping	01	State Employees

Tips

- **1st Program Grouping** is used to determine an employee's retirement plan eligibility. This field defaults in as eligible for retirement. To verify that the position is eligible, use transaction code PO13D, click the gray box to the left of **Acct Assignment Features (1008)** infotype. If there is an X in the box next to the Retirement Eligible field, then the position is retirement eligible. If the box is blank, the position is not retirement eligible.
- **2nd Program Grouping** defines the employee's job type and employer. The value in the 2nd Program Grouping field defaults from the personnel area. You will have to change the 2nd Program Grouping field if:
 - An employee chooses a different plan.
 - The employee type defaults to a code not consistent with the System/Plan set up at hiring
 - 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](#)

Possible subsequent activit...

Enrolled on 10/15/2016

Terminated on 10/14/2016

Automatic Plans

Default Plans

All plans

Add. functions 10/15/2016

Plan overview

Enrollment Form

Particip. Monitor

New Hire Action – Previous State Employee (PA40) (cont.)

94. Click the **Get offer** button on the Enrollment screen.

95. Click the appropriate Savings Plan.

Enrollment

Direct selection Selection set

Personnel no.

ID number

Select

Enroll

Name Gray Nina on 10/15/2016 Overview

Offer selection

Get offer Print form General Notice Error list

Possible offers	Enrollment period
Retirement Enrollmnt	01/01/1800 - 12/31/9999

Retirement Enrollmnt

Enroll Costs Undo selection Error List

Plan	Status	Validity period	Acti...
401(a)			
• PERS 2		10/15/2016 - 12/31/9999	
• PERS 3 - Option U		10/15/2016 - 12/31/9999	
• PERS 3 - Rate A - Self		10/15/2016 - 12/31/9999	
• PERS 3 - Rate A - WSIB		10/15/2016 - 12/31/9999	
• PERS 3 - Rate B - Self		10/15/2016 - 12/31/9999	
• PERS 3 - Rate B - WSIB		10/15/2016 - 12/31/9999	
• PERS 3 - Rate C - Self		10/15/2016 - 12/31/9999	
• PERS 3 - Rate C - WSIB		10/15/2016 - 12/31/9999	
• PERS 3 - Rate D - Self		10/15/2016 - 12/31/9999	
• PERS 3 - Rate D - WSIB		10/15/2016 - 12/31/9999	
• PERS 3 - Rate E - Self		10/15/2016 - 12/31/9999	
• PERS 3 - Rate E - WSIB		10/15/2016 - 12/31/9999	
• PERS 3 - Rate F - Self		10/15/2016 - 12/31/9999	
• PERS 3 - Rate F - WSIB		10/15/2016 - 12/31/9999	

Tips

- After clicking the **Get Offer** button, HRMS will identify all plans that the employee is eligible to participate.

Stop

- Refer to the Department of Retirement Systems to determine the appropriate retirement plan selection for the employee.

New Hire Action – Previous State Employee (PA40) (cont.)

96. Enter retirement deduction amount in the Pre-tax Contribution Semi-monthly Percentage field on the **Maintain Savings Plan** screen.

The following field is mandatory:

- **Percentage**

97. Click the **Accept** ( **Accept**) button. This will bring you back to the **Enrollment** screen.

98. Click the **Enroll** ( **Enroll**) button on the Enrollment screen.



Maintain Savings Plan

Pers.No. 4000063 Gray Nina
 Plan PERS 2
 Start 10/15/2016 - 12/31/9999

Stop participation in period

Contribution regular

Pre-tax contribution Semi-monthly

Amount 0.00 USD Pre-Tax Rollove
 Percentage 5.12
 Units 0 x 0.00 USD

Post-tax contribution Semi-monthly

Amount 0.00 USD Start Pst-Tax I
 Percentage 0.00
 Units 0 x 0.00 USD

 **Accept** 



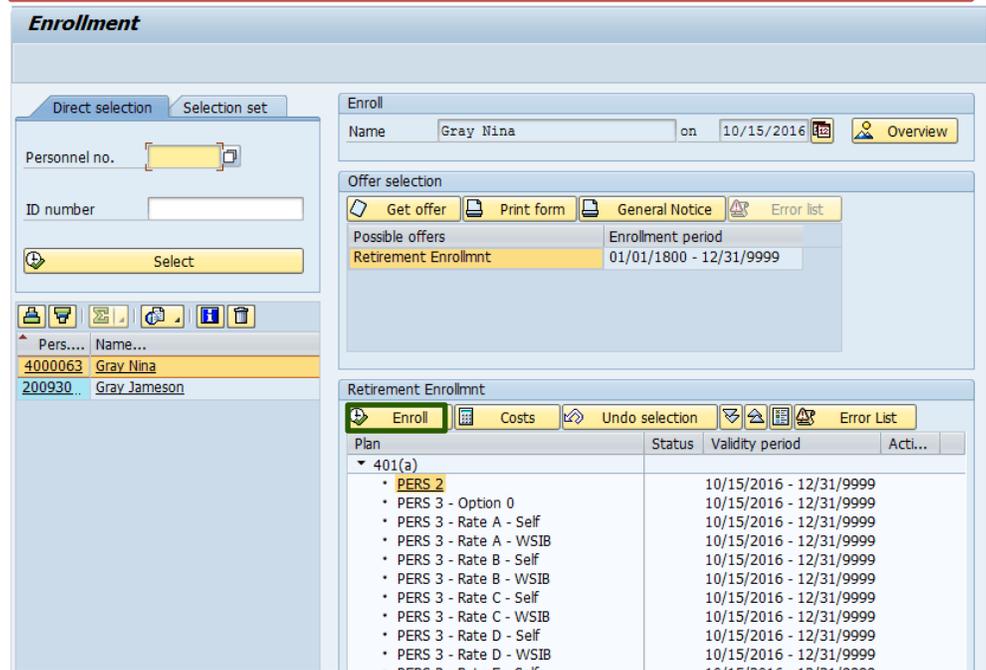
Stop

- **Do not** leave the percentage field blank or HRMS will not take any deductions for retirement.



Tips

- If you do not know the correct plan contribution percentage, HRMS can prompt you. Click in the percentage field and enter any number 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 should be for the selected plan.



Enrollment

Direct selection Selection set

Personnel no.
 ID number

Pers....	Name...
4000063	Gray Nina
200930	Gray Jameson

Enroll

Name Gray Nina on 10/15/2016 

Offer selection

Possible offers	Enrollment period
Retirement Enrollmnt	01/01/1800 - 12/31/9999

Retirement Enrollmnt

Plan	Status	Validity period	Acti...
401(a)			
• PERS 2		10/15/2016 - 12/31/9999	
• PERS 3 - Option 0		10/15/2016 - 12/31/9999	
• PERS 3 - Rate A - Self		10/15/2016 - 12/31/9999	
• PERS 3 - Rate A - WSIB		10/15/2016 - 12/31/9999	
• PERS 3 - Rate B - Self		10/15/2016 - 12/31/9999	
• PERS 3 - Rate B - WSIB		10/15/2016 - 12/31/9999	
• PERS 3 - Rate C - Self		10/15/2016 - 12/31/9999	
• PERS 3 - Rate C - WSIB		10/15/2016 - 12/31/9999	
• PERS 3 - Rate D - Self		10/15/2016 - 12/31/9999	
• PERS 3 - Rate D - WSIB		10/15/2016 - 12/31/9999	

New Hire Action – Previous State Employee (PA40) (cont.)

103. You have successfully completed the **New Hire Action – Previous State Employee** procedure.

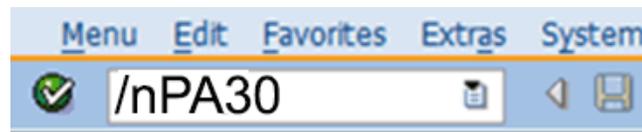
Tips

- For a new retirement eligible employee, upon completion of the enrollment process, immediately update the Plan Choice code on the **Savings Plan (0169)** infotype to place the employee on the 70-day/90-day default report. Go to Step 104 or refer to *Retirement Plan Choice Coding during 90 day period (New Hire)* user procedure located on the [OLQR](#).
- Once the employee submits their completed DRS member information form designating their plan choice during the 90-day period, complete one of two user procedures:
 - If the employee chooses to stay in Plan 2, see the [OLQR](#) user procedure for *Retirement Plan Choice Code Chosen Plan or Defaulted to Plan 2*.
 - If the employee chooses Plan 3, see the [OLQR](#) user procedure for *Retirement Plan Choice Code Chosen Plan or Defaulted to Plan 3*.
- New PERS employees are enrolled in Plan 2 and will default to P3, Rate A – WSIB invest manager if no plan is chosen within the 90-day period.

Tips

- The **Benefits Processor** will need to update the Plan Choice code on the **Savings Plans (0169)** infotype to place the employee on the 70-day/90-day default report. Follow Steps 104-112 or refer to *Retirement Plan Choice Coding during 90 day period (New Hire)* user procedure located on the [OLQR](#).

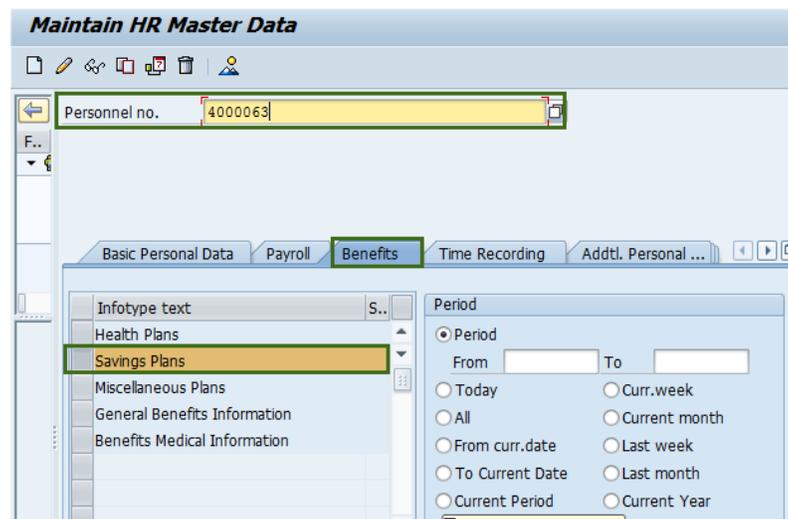
104. Enter **/nPA30** in the Command field and click the **Enter** () button or press **Enter** on the keyboard.



105. Enter the Personnel Number in the **Personnel no.** field.



106. In the **Benefits** tab, click the box to the left of **Savings Plan**.



107. Click the **Change** () button to begin transaction.

New Hire Action – Previous State Employee (PA40) (cont.)

108. Complete the **Change Savings Plan (0169)** infotype.

The following field is mandatory:

- **Plan Choice Code**

109. A list of Codes are available by clicking the matchcode in the Plan Choice Code field.

Select the appropriate **Plan Choice** and click the **Copy** (📄) button.

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

111. Click the **Save** (💾) button.

112. You have successfully completed the Plan Choice Code transaction.

Change Savings Plans (0169)

Personnel No. 4000063 Name Gray Nina

PersArea 1630 Consolidated Technology Svcs EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 10/15/2016 to 12/31/9999 Chng 09/20/2016 CINDYC

Plan P2 PERS 2

Plan data Administration Regular contrib. Bonus contribution Benefi...

General plan data

Benefit area US USA

Plan type 401A 401(a)

Benefit plan P2 PERS 2

Planning Parameters

EE Contr. Variant PRS2 PERS 2

ER Contr. Variant PRS2 PERS 2

Vesting rule

Investment Group

Additional fields

Plan Choice Code 2N 📄

📄 Tips

- The example shows 2N for a new PERS enrollee.

Plan Choice Code (1) 161 Entries found

Restrictions

Plan	PlanChoiceC	Plan Choice Code txt
E3FS	3D	DEFAULT FROM PLAN 2
E3FS	3X	TRANSFER FROM PLAN 2
E3FW		
E3FW	3C	CHOSE PLAN 3
E3FW	3D	DEFAULT FROM PLAN 2
E3FW	3X	TRANSFER FROM PLAN 2
P2		
P2	2C	CHOSE PLAN 2
P2	2N	NEW PLAN 2 ENROLLEE
P30		
P30	3C	CHOSE PLAN 3
P30	3D	DEFAULT FROM PLAN 2
P30	3X	TRANSFER FROM PLAN 2
P3AS		

📄 Tips

- You have entered the Plan Choice Code which will place the employee on the 70-Day Report/90-Day Default Report for monitoring purposes. If the employee has not made a selection at the end of the 90-day period, they will automatically default. New PERS employees will default to PERS Plan 3- Rate Option A, WSIB Investment Manager.