

Slide 1 - Title Slide

**Personnel Administration
Actions
(HR_PA_310)**

Presented by Enterprise Applications Training

UK Information
Technology Services

The slide features a dark blue background with a network of white lines and nodes, overlaid with faint binary code (0s and 1s) and glowing bokeh light effects in shades of blue and purple.

Slide 4 - Slide 4

Course Content

Unit 1: Introduction

Unit 2: Personnel Administration Actions

Unit 3: Additional PAAction Infotypes

Unit 4: Payroll Authorization Record (PAR)

PAActions myHelp Website

PAActions Assessment & Practice Guide Information



Slide 5 - Unit Intro Slide

Unit 1 - Introduction



Key Terminology

The following are key terms used throughout this course:

Action - A series of infotypes that automatically appear in a logical order for data entry to complete a HR process.

Payroll Authorization Record (PAR) - The paperwork summarizing the data entered in an Action.

Delimit - A process to end (but not delete) an infotype record by shortening its validity period.

Payroll Area - Used to group employees with the same payroll cycle and to determine payroll periods (Monthly or Biweekly). Also defines the frequency with which an employee is paid.

Employment Percent - Indicates an employee's FTE (Full Time Equivalency), based on either a 40 or 37.5 hour work week.

- Example: A Regular, Full-time employee working 40 of 40 hours is 100% FTE

Key Terminology (Continued)

Organizational Unit - Any type of organizational entity found at the University, such as a College, Division, Department, etc. It is identified with an 8-digit number starting with a '3'.

- Example: 30000358 - College of Medicine

Position - Describes individual employee placements or assignments in the University. It is identified with an 8-digit number starting with a '5'.

- Example: 50128809 - Staff Support Associate II

Person ID (PID) - A unique 8-digit number assigned to an employee by SAP during the New Hire Action. To be used for identification purposes instead of the Social Security Number, although a search using the SSN is still possible. This number will not change.

Personnel Number (PerNr) - Each personnel assignment is uniquely identified in SAP by the PerNr (pronounced "Per-Ner"). Generally, the same PerNr is retained when employees change assignments, but a new PerNr is established for each additional assignment.

Person ID & Personnel Number

If an employee's records were converted to SAP when the HR module went live (April 1, 2006):

- The Person ID will begin with a zero (0); and
- The Personnel Number (PerNr) will be the same as the Person ID.
- Example: George Smithfield: Person ID=00012879 and PerNr=00012879

Any employee hired after go-live will have:

- A Person ID that begins with a one (1); and
- A PerNr that begins with a one (1) or a two (2), but it will **not** be the same as the Person ID.
- Example: Agnes Witherspoon: Person ID=10025645 and PerNr=10011498

Slide 9 - Slide 9

Person ID & Personnel Number (Continued)

These numbers can be seen at the top of a completed PA Actions screen (as well as some of the other HR transactions, such as PA20 and PA30).

The screenshot shows a software interface with a header bar and a data table. A red box highlights the top header bar. Three yellow callout boxes point to specific fields: 'Person ID' points to '10014547', 'Personnel Number (PerNr)' points to '00013029', and 'Position Number (starts with a '5')' points to '50127718'.

Person ID	10014547	Pers.Assgn	00013029	50127718	00013029...
Name	Aaron W Trull	Empl. %	20.0		
EE group	B Students	Pers.area	1000	Main Cam	
EE subgroup	09 Student	Pers. subarea	0007	Temp PT	
Start	04/25/2006				

Personnel Administration (PA) Actions

Business Officers and Personnel Administrators select PA Actions via transaction **PA40** to carry out processes that change individual assignments.

PA Actions are carried out through a series of infotypes that appear automatically in a logical order, prompting the user to enter and save data as required.

Some example PA Actions:

- New Hire/Rehire
- Additional Assignment
- Position Change
- Position Update
- Separation



Slide 11 - Slide 11

PA Actions (Continued)

Once a PA Action is completed, a **Payroll Authorization Record (PAR)** must be generated, printed, signed, and sent to HR Compensation along with one copy of the PAR and all supporting documentation. (Further information and instructions on processing a PAR will be covered later in this course in the **Payroll Authorization Record (PAR)** unit.)



Payroll Schedule

The Payroll Schedule is extremely helpful in processing Actions and can be found and printed from Payroll Services' website:

- <http://www.uky.edu/ufs/payroll-services-links>

You should always have the most current Payroll Schedule printed and readily available, as you will need to refer to it for several HR-related functions and transactions!

SAP Biweekly Payroll Schedule for July - Dec 2020									
Time Load, Time Transfer, and Time Evaluation MUST be run EACH day									
Documents MUST be received in Compensation by Monday 5:00 PM CST	Data and Time Input MUST be entered by Thursday 2:00 pm CST Payroll Run (Print)	Conditions and Other Data MUST be entered Sunday 5:00 am CST Payroll Correction Run (Web)	Corrections and Other Data MUST be entered Sunday 5:00 am CST for Biweekly payroll corrections Payroll Correction Print Run	Payroll Period Dates				HR-related Data Set A New HR Payroll	Payroll Confirmation Off Cycle Processing (Web)SARS
Bi-Weekly Date	Bi-Weekly Date	Bi-Weekly Date	Bi-Weekly Date	Begin	End	Time	End	HR-Related Data Set A New HR Payroll	Payroll Confirmation Off Cycle Processing (Web)SARS
06/29/20	07/01/20 Wednesday	07/05/20	07/06/20	07/01	07/15	7:10	14		
07/13/20	07/16/20	07/19/20	07/20/20	07/16	07/30	7:24	18		
07/27/20	07/29/20	08/02/20	08/03/20	07/29	08/12	8:17	20		
08/10/20	08/13/20	08/16/20	08/17/20	08/10	08/24	8:18	21	08/21/20	
08/24/20	08/27/20	08/30/20	08/31/20	08/24	09/07	8:18	22		
09/07/20	09/08/20	09/11/20	09/12/20	09/07	09/21	8:18	23		
09/21/20	09/22/20	09/25/20	09/26/20	09/21	10/05	8:18	24		
10/05/20	10/06/20	10/09/20	10/10/20	10/05	10/19	8:18	25		
10/19/20	10/20/20	10/23/20	10/24/20	10/19	11/02	8:18	26		
11/02/20	11/03/20	11/06/20	11/07/20	11/02	11/16	8:18	27		
11/16/20	11/17/20	11/20/20	11/21/20	11/16	11/30	8:18	28		
11/30/20	12/01/20	12/04/20	12/05/20	11/30	12/14	8:18	29		
12/14/20	12/15/20	12/18/20	12/19/20	12/14	12/28	8:18	30		
*The 11/30 payroll system will be available for changes all day on Saturday and Sunday and 9:00 am **Payroll is run Thursday									

SAP Monthly Payroll Schedule for July - Dec 2020									
Time Load, Time Transfer, and Time Evaluation MUST be run EACH day									
Documents MUST be received in Compensation by Monday 5:00 pm CST	Data and Time Input MUST be entered by Thursday 2:00 pm CST Payroll Run (Print)	Conditions and Other Data MUST be entered by Sunday 5:00 am CST Payroll Correction Run (Web)	Corrections and Other Data MUST be entered by Sunday 5:00 am CST Payroll Correction Print Run	Payroll Period Dates				HR-related Data Set A New HR Payroll	Payroll Confirmation Off Cycle Processing (Web)SARS
Monthly Date	Monthly Date	Monthly Date	Monthly Date	Begin	End	Time	End	HR-Related Data Set A New HR Payroll	Payroll Confirmation Off Cycle Processing (Web)SARS
07/28/20	07/29/20	07/31/20	07/31/20	07/28	07/31	07:21	7		Monthly Payroll Only
08/11/20	08/12/20	08/13/20	08/13/20	08/11	08/31	08:21	8	08/31/20	
08/14/20	08/15/20	08/16/20	08/16/20	08/14	08/31	08:26	8		
08/28/20	08/29/20	08/30/20	08/30/20	08/28	08/31	08:26	8		08/31/20
09/11/20	09/12/20	09/13/20	09/13/20	09/11	09/30	08:26	10		
09/14/20	09/15/20	09/16/20	09/16/20	09/14	09/30	08:26	10		
09/28/20	09/29/20	09/30/20	09/30/20	09/28	09/30	08:26	10		
10/11/20	10/12/20	10/13/20	10/13/20	10/11	10/31	08:26	12		

*Gross pay processing of salaries and benefits through payroll process, salary and benefit adjustments or changes will be implemented
 **Benefit transactions (leave, sick, etc.) will be processed and benefit payments processed at the end of the month.

Slide 13 - Slide 13

Payroll Schedule (Continued)

The first column on the left indicates the deadline when PARs and supporting documentation need to be received in HR Compensation for the pay period in which a PA Action is processed.

For example, if a Biweekly New Hire Action is processed with a Start (**Begin**) date of 06/21/2020, then the PARs and documents must be in Compensation by 5:00 PM on 06/29/2020.

SAP Biweekly Payroll Schedule for July - Dec 2020							
Time Load, Time Transfer, and Time Evaluation MUST be run EACH day							
Documents MUST be received in Compensation by Monday 5:00 PM EST	Data and Time Input MUST be entered by Thursday 5:00 pm EST Payroll Run (Prelim)	Corrections & Other Data MUST be entered Sunday 5:00 pm EST Payroll Correction Run (Trial)	Departments have until Monday 5:00 pm EST for biweekly payroll corrections Payroll Correction Final Run	Payroll Period Dates			**Earliest Retro Date Set After BW Payroll
Bi Weekly Date	Bi Weekly Date	Bi Weekly Date	Bi Weekly Date	Begin	End	Date Paid	PR #
06/29/2020	07/01/2020 /Wednesday	07/05/2020	07/06/2020	6/21	7/4	7/10	14
07/13/2020	07/16/2020	07/19/2020	07/20/2020	7/5	7/13	7/24	15
07/27/2020	07/30/2020	08/02/2020	08/03/2020	7/16	8/1	8/7	16
08/10/2020	08/13/2020	08/16/2020	08/17/2020	8/2	8/15	8/21	17 08/21/2020
08/24/2020	08/27/2020	09/01/2020	09/01/2020	8/16	8/29	9/4	18
09/07/2020	09/10/2020	09/13/2020	09/14/2020	8/26	9/13	9/13	19

Slide 14 - Slide 14

Infotype Validity Dates

Each infotype record created during a PA Action has a start (**From**) and end (**To**) date to identify its validity period.

While processing a PA Action, the Start date indicated on the initial PA40 screen will copy over as the **From** date on each infotype record that appears (except for Personal Data (0002), which will be the employee's date of birth).

Records will always default with an end (**To**) date of 12/31/9999, often referred to as the "high date".

From	11/30/1962	To	12/31/9999
------	------------	----	------------



Do not change these dates once you are past the initial PA40 screen and into the infotypes!

Slide 15 - Slide 15

Infotype Validity Dates (Continued)

Some PA Actions will delimit existing infotype records, and new records will be created with new/updated data.

A Warning Message will appear in the Status Bar for each infotype record being delimited. For example:

A screenshot of a warning message displayed in a status bar. The message is enclosed in a grey rectangular box with a thin border. On the left side of the box is a yellow warning icon (an exclamation mark inside a triangle). To the right of the icon, the text reads: "Record valid from 08/07/2005 to 12/31/9999 delimited at end".

 Record valid from 08/07/2005 to 12/31/9999 delimited at end

Press the **Enter** key to acknowledge and move past the message.

When the new record is saved, the system will automatically change the **To** date on the delimited record to the day before the **Start** date of the new record.

Slide 16 - Slide 16

Security in SAP-HR

HR security roles in Production allow you to view HR data within your area of responsibility only.

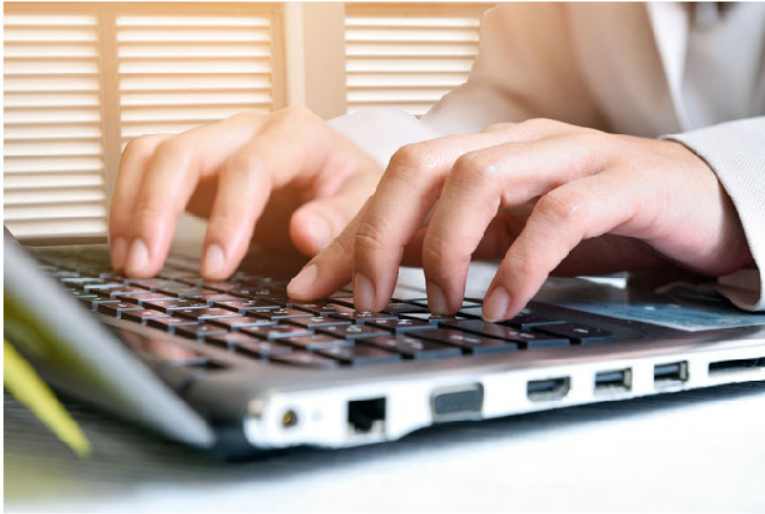
Access is limited to infotypes needed to fulfill your role.

- Example: You may have access to an employee's HR master data within your Organizational Unit, but not to certain Benefits or Payroll infotypes, such as Health Plans (0167) or Bank Details (0009).
- Access may also be limited to Display Only, such as Residence Status (0094).
- In the Training Sandbox, you may be able to view more infotypes than you will in Production.

You can search for any employee in SAP if you are hiring, such as for a transfer or an additional assignment.

Slide 22 - Slide 22

Unit 2 - Personnel Administration Actions



PA Actions Overview

Personnel Administration (PA) Actions are carried out through a series of infotypes that appear automatically in a logical order, prompting the user to enter and save data as required.

- Some Actions may have several infotypes to be completed. For example: New Hire and Additional Assignments.
- Some Actions may have a small number of infotypes to be completed. For example: Position Update and Separation.

Regardless of the Action Type, the majority of the time when an infotype is presented, you will do the same thing on that infotype. Meaning, you will complete the same fields and save, or you will just press **Enter** and let the system populate certain fields and/or validate the data on the screen, etc.

Slide 24 - Slide 24

PA Actions Overview (Continued)

The infotypes covered in this unit and the instructions given for each are based on processing a **New Hire Action**, which contains the majority of infotypes you will encounter when processing any PA Action.

There are a few additional infotypes which may or may not be presented during various PA Actions that will also be addressed in the next unit in this course.



For some PA Actions there will be exceptions to the instructions on completing an infotype from what is presented in this unit! These are addressed on the Quick Reference Cards (QRC) on the SAP myHelp website: myhelp.uky.edu/rwd/HTML/index.html.

PA Actions myHelp Website

PA Actions QRC example:

Personnel Administration Actions

-  ZHR_PAR Generating a PAR.
-  Request PA Action/Change In Base Pay
-  Approve PA Action/Change In Base Pay
-  PA40 Main Campus New Hire
-  PA40 Hospital New Hire
-  PA40 Rehire/Reinstatement
-  PA40 Additional Assignment
-  PA40 Reactivate Additional Assignment
-  PA40 End of Additional Assignment
-  PA40 Position Change
-  PA40 Position Update
-  PA40 Change in Status
-  PA40 FTE Change
-  PA40 Leave of Absence With Pay
-  PA40 Return From LOA With Pay
-  PA40 Leave of Absence Without Pay
-  PA40 Return From LOA Without Pay
-  PA40 Long Term Disability
-  PA40 Phased Retirement
-  PA40 Retirement
-  PA40 Separation

Quick Reference Card – Human Resources

ZHR_PAR Generating a PAR



Process: Transaction ZHR_PAR is used to generate and print a Payroll Authorization Record (PAR) after completing a Personnel Administration (PA) Action (via transaction PA40). A PAR is required for all PA Action Types, except the Separation Action. The original, signed PAR and one (1) copy, along with the original of all supporting documentation (i.e. I-9 form, W4/K4 forms, Direct Deposit form, Salary Recommendation Form, etc.), must be sent to the HR Compensation Office by the deadline listed on the IRIS Payroll Schedule for timely processing. For the Separation Action, send the completed UK Employee Separation Sheet to the HR Compensation Office instead of a PAR.

Role: Authorized Users **Frequency:** As Needed

Beginning

Enter the transaction code ZHR_PAR

Personnel Authorization Request

Enter the **Reporting Period / Key Date**, which **MUST** be the same date used as the **Start** date for the PA40 Action!

Reporting Period / Key Date	10/16/20
-----------------------------	----------

Enter the person's **Personnel Number**

Personnel Number	21027
------------------	-------

It is requested that the name and contact information of the person generating the PAR be listed in the **Comments** section. Anything entered in this section will print on the PAR.

Comments	Call HR at 312-244-4614 for more info
----------	---------------------------------------

Click on the **Execute** icon in the Application Toolbar



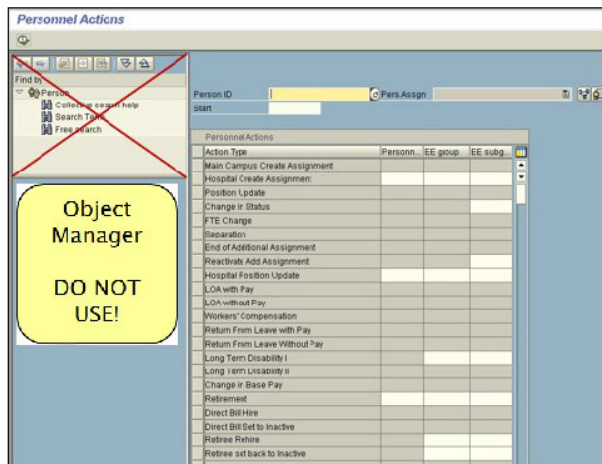
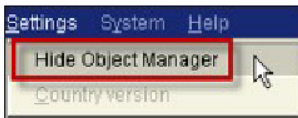
PA Actions Transaction: PA40

Transaction Code **PA40** is used to process PA Actions.

The Object Manager, seen on the left side of the screen, is typically used for system searches. Even though you will be searching the system for employees during various Actions, do not use the Object Manager.

We actually recommend that you hide the Object Manager section.

To hide the Object Manager, select **Settings** --> **Hide Object Manager** in the Menu Bar.



Slide 27 - Slide 27

PA40 Tips

Always start a PA Action with a clear screen. If an employee's information from a previous PA Action is seen in the top portion of the screen, delete the **Person ID** and press **Enter**, which will clear this information.



The screenshot shows the 'Personnel Actions' window. The 'Person ID' field contains the value '10001766' and is highlighted with a red box. A red arrow points to this field. Other fields include 'Name' (Tonsey, T. Smith), 'Emp. %' (100.00), 'H+ group' (A Staff), 'Pers.area' (1000 Main Campus), 'EE subgroup' (05 Non-Exempt 4...), 'Pers. subarea' (300), 'Req FT', and 'Start' (10/01/2020).

Do **not** use the green **Back** icon in the Standard Toolbar while working on a PA Action. Using the **Back** icon will leave the PA Action unfinished. The icon may be used **only** once a PA Action is 100% completed.

After completing each infotype screen but before saving, always press the **Enter** key and check the Status Bar for any system messages that might need to be addressed.

Slide 28 - Slide 28

PA40 Initial Screen

As for completing the **Person ID** and **Start** fields, refer to the instructions on the appropriate QRC on the PA Actions myHelp website.

❖ **TIP:** Do not enter a **Person ID** (1) when executing the **Main Campus Create Assignment** or **Hospital Create Assignment** Action Types for any of the following:

- New Hire/Rehire/Reinstate
- Position Change (Promotion, Transfer, etc.)
- Additional/Overload Assignment

Once the **Person ID** and **Start** fields are properly completed per the QRC, click on the gray selection box next to the appropriate **Action Type** (2).

Click on the **Execute** icon in the Application Toolbar (3) to begin the Action.

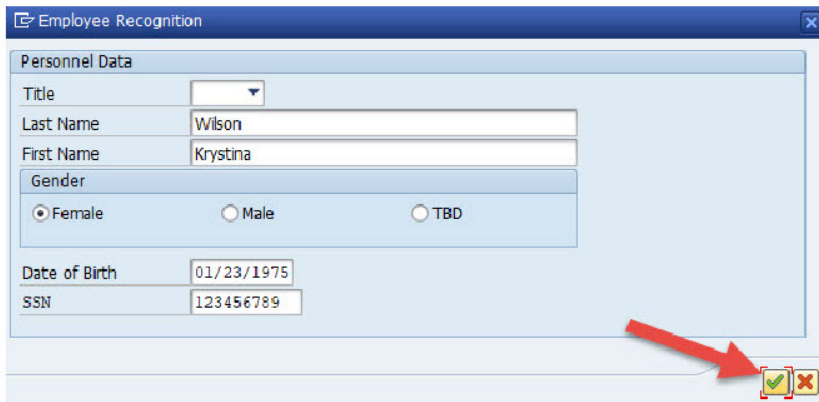
The screenshot shows the 'Personnel Actions' application interface. At the top, there is a toolbar with an 'Execute' icon (a green play button) circled in red and labeled '3'. Below the toolbar, there are two input fields: 'Person ID' and 'Start'. The 'Start' field is circled in red and labeled '1'. Below the input fields, there is a list of 'Action Type' options. The 'Main Campus Create Assignment' option is highlighted in yellow and has a gray selection box next to it, which is circled in red and labeled '2'. Other options in the list include 'Hospital Create Assignment' and 'Person Update'.

Slide 29 - Slide 29

Employee Recognition

Whenever the **Person ID** field is left blank, the **Employee Recognition** window will appear immediately after clicking on the **Execute** icon on the initial screen.

You must enter the employee's **Last/First Name**, **Gender**, **Date of Birth**, and **SSN**, and then click on the green **Continue** icon (or press **Enter**).



The screenshot shows a window titled "Employee Recognition" with a "Personnel Data" section. The form contains the following fields and options:

Personnel Data	
Title	<input type="text"/>
Last Name	<input type="text" value="Wilson"/>
First Name	<input type="text" value="Krystina"/>
Gender	<input checked="" type="radio"/> Female <input type="radio"/> Male <input type="radio"/> TBD
Date of Birth	<input type="text" value="01/23/1975"/>
SSN	<input type="text" value="123456789"/>

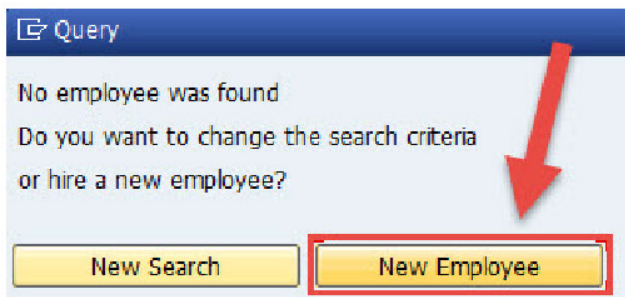
A red arrow points to the green "Continue" icon (a checkmark in a box) located at the bottom right of the form, next to a red "X" icon.

Slide 30 - Query window

Employee Recognition (Continued)

If the employee is not found in the system, the **Query** window will appear.

Click on the **New Employee** button to continue.

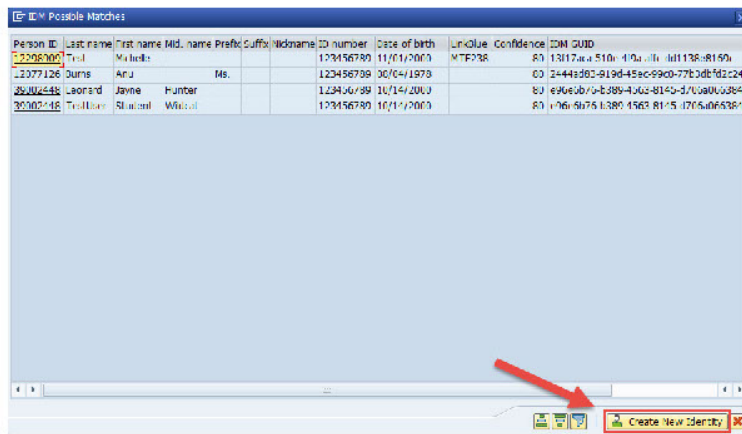


Slide 31 - Slide 31

Employee Recognition (Continued)

The **IDM Possible Matches** window will appear next.

If there are no names listed in the window OR the name of your new employee is not seen in the list of names, click on the **Create New Identity** button in the lower corner to continue.



Slide 32 - Slide 32

Employee Recognition (Continued)

If you **do** see the name of your new employee in the list of names in the **IDM Possible Matches** window, click on the **Person ID** next to their name to select and continue.

Person ID	Last name	First name	Mid. name	Prefix	Suffix	Nickname	ID number	Date of birth	LinkBlue	Confidence	IDM GUID
12298909	T...	Michelle					123456789	11/01/2000	MTE238	80	13f17aca-510e-4f9a-affc-dd1138e8169c
12077126	Burns	Anu		Ms.			123456789	08/04/1978		80	2444ad83-919d-45ec-99c0-77b3dbfd2c24
39002448	Leonard	Jayne	Hunter				123456789	10/14/2000		80	e96e6b76-b389-4563-8145-d706a066384d
39002448	TestUser	Student	Wildcat				123456789	10/14/2000		80	e96e6b76-b389-4563-8145-d706a066384d

The **Create Actions (0000)** infotype will be the first screen to appear.

Create Actions (0000)

Change info group

Person ID: Pers.Assgn: 00000000

Pers.No.:

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

Slide 33 - Slide 33

Pers.No. and Start/to Dates

Although the cursor defaults in the **Pers No.** field, **do not ever enter a value.** The system will automatically populate the Personnel Number within the first few infotypes of the Action.

Create Actions (0000)

Change info group

Person ID Pers.Asson 00000000

Pers.No.

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

Also, once you are into a PA Action's infotypes, **do not ever change the Start or to dates** at the top of the screen.

- The **Start** date defaults to the **Start** date indicated on the initial PA40 screen, and the **to** date will always default to the "high date" (12/31/9999).

Slide 34 - Slide 34

Create Actions (0000)

Complete the **Create Actions (0000)** screen by first selecting the appropriate **Reason for Action** (1).

- Click on the **Possible Entries** icon to display the list of available reasons, then double-click to select.

Next, enter the **Position** number (2), and then press **Enter**.

Create Actions (0000)

Change info group

Person ID: [] Pers. Assgn: 00000000

Pos.No.: []

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

Reason for Action: 00

Action Type: ZA Main Campus Create Assignment

Name of action type: Main Campus Create Assignment

Actk Name of reason for action

01	Staff Hire
02	Student Hire
03	STEPS Hire
04	Faculty Hire
05	Post-Doc Hire
06	Police Hire
07	Visiting Scholar Hire

Organizational assignment

Position: 51105147

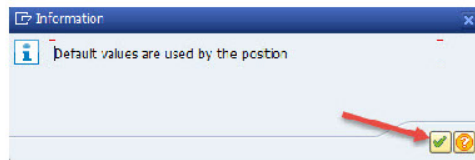
Personnel area: []

Employee group: []

Employee subgroup: []

Create Actions (0000) (Continued)

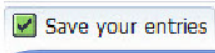
With a **Position** number entered, the following dialog box will appear:



Click on the green **Continue** icon or press **Enter**. This will automatically populate several fields on some of the infotypes with default attributes from the position's master data. For example:

Organizational assignment	
Position	50105137 Administrative Support As
Personnel area	1000 Main Campus
Employee group	A Staff
Employee subgroup	06 Non-Exempt 37.5 hour

Check the Status Bar for any system messages. Once it reads "**Save your entries**", click on the **Save** icon in the Standard Toolbar to complete this infotype and continue.



Slide 36 - Personal Data infotype

Create Personal Data (0002)

The information entered previously in the Employee Recognition window will already be displayed in the **Create Personal Data (0002)** screen.



The employee's **Last/First/Middle name** must match the name on the employee's Social Security Card. Edit accordingly.

Use the **Suffix** field to enter Jr., Sr., I, II, etc. Do not enter this in the **Last name** field.

The **Nickname** field is optional, but can be used if the employee has a preferred first name, such as Bill instead of William.

Please use proper capitalization and double-check spelling.

Name	
Title	<input type="text"/>
Last name	<input type="text" value="Wilson"/>
First name	<input type="text" value="Krystina"/>
Middle name	<input type="text" value="F."/>
Suffix	<input type="text"/>
Name	<input type="text"/>
Name Format	<input type="checkbox"/>
Nickname	<input type="text"/>
HR data	
SSN	<input type="text" value="777-01-0025"/>
Birth date	<input type="text" value="01/23/1975"/>
Mar. Status	<input type="text"/>
Gender	<input checked="" type="radio"/> Female <input type="radio"/> Male

Slide 37 - Slide 37

Create Personal Data (0002) (Continued)

Upon pressing Enter, the **Start** date will change to the employee's **Birth date**.
Do not change this!

This will be the only infotype in which the **Start** date does not match the **Start** date entered on the initial screen.

The screenshot shows the 'Create Personal Data (0002)' form. At the top, 'Person ID' is '7_00029252' and 'Pers. Assign' is '00029252 (Active)'. The 'Start' date is '01/23/1975' and 'To' is '12/31/9999'. The 'Name' section includes 'Last name' (Wilson), 'First name' (Kristina), and 'Middle name' (F.). The 'HR data' section shows 'SSN' as '777-01-0020' and 'birth date' as '01/23/1975'. The 'Gender' is set to 'Female'.

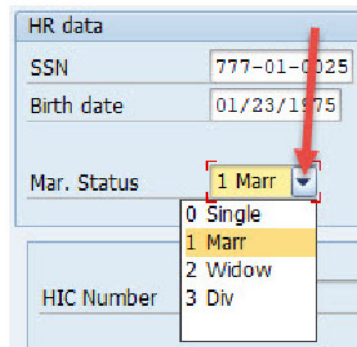
Slide 38 - Slide 38

Create Personal Data (0002) (Continued)

For the employee's **Marital (Mar.) Status** field, which is optional...

If the marital status is known but the spouse information is not available, do not choose **Married** for the employee. Leave the field blank, press **Enter**, and then click on the **Save** icon to continue to the **Create Organizational Assignment (0001)** infotype.

If the spouse information is available, select **Married** from the drop-down menu, press **Enter**, and then click on the **Save** icon to continue to the **Create Family Member/Dependents (0021)** infotype.



The screenshot shows a form titled "HR data" with the following fields:

SSN	777-01-0025
Birth date	01/23/1975
Mar. Status	1 Marr
HIC Number	3 Div

The "Mar. Status" dropdown menu is open, showing the following options:

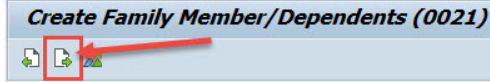
- 0 Single
- 1 Marr
- 2 Widow
- 3 Div

A red arrow points to the "1 Marr" option in the dropdown menu.

Create Family Member/Dependents (0021)

The employee's **Last name** will auto-populate on the **Create Family Member/Dependents (0021)** infotype. Enter all other known information about the employee's spouse, press **Enter**, and then click on the **Save** icon.

NOTE: If you get to this infotype but do not know the spouse's information, click on the **Next Record** icon in the Application Toolbar to skip this infotype and advance to the **Create Organizational Assignment (0001)** infotype.



The screenshot shows the 'Create Family Member/Dependents (0021)' infotype form. At the top, there are fields for 'Person ID' (39202418) and 'Pers.Assgn' (00029252 (Active)). Below that is a 'Start' date field (12/22/2020) and an 'End' date field (12/31/9999). A 'Member' dropdown menu is set to 'Spouse' with a 'Number' field next to it. The 'Personal data' section includes fields for 'Last name' (William), 'First name' (William), 'Title', 'Gender' (radio buttons for Female, Male, Undeclared), 'Birth date', 'SSN', 'RIN', 'Address' (123 Main St.), 'Address 2', 'City/State' (Louisville, KY), 'Zip/country' (40203, USA), 'Ref.Pers.No.', 'Taxation number' (850 123-4567), 'Separation Date', 'Marital status', 'Disability' checkbox, 'Disability Date Learned', and 'Student indicator' checkbox.

Slide 40 - Slide 40

Create Organizational Assignment (0001)

The system will auto-populate many of the fields on the **Create Organizational Assignment (0001)** infotype.

All you do is press **Enter**, check the **Status Bar** for any system messages, and then click on the **Save** icon to proceed to the next infotype in the Action.

A few additional field values are populated by the system upon pressing **Enter**.

NOTE: Do not change the **Percentage** value displayed in the **Organizational plan** section.

Create Organizational Assignment (0001)

Org Structure

Person ID: 3303419 Pers.Assgn: 00029252

Start: 10/11/2020 12/31/9999

Organisational structure

Org. Unit: University of Kentucky Subunit: 0001 Bus. Area: 1101 Reg. PT

Cost. Cl.: 1010010000 REGISTRAR Bus. Area: 1101 UK w/o component units

Func. Area:

Personnel structure

EC group: Staff Payr. area: Employee

EE subgroup: Non-Exempt 37.5 hour Contract:

Organizational plan

Percentage: 20.00 Assignment

Position: 02100007 (3807.0000) Administrative: Supervisor

Org. Unit: 00100 (3807.0000) Administrative: Supervisor

Exempt: 0

Org. Unit: 00100 00100

Org. key: Registrar

Administrative

Personnel:

Items:

Payroll:

Create Addresses (0006)

The first address to enter on the **Create Addresses (0006)** infotype is the employee's **Permanent residence**, which refers to their home address.

Please use proper capitalization in completing the free-form fields, like the **Address Line 1** field.

Do not enter any information in the **Address Line 2** field.

The **Communications** section is optional, but it provides the ability to enter Cell, Fax, Pager, and other numbers if known.

Create Addresses (0006)
Foreign address

Person ID: 39003418 Pers. Assgn: 00029202 00105137 00029252...
 Name: Miyashiro, P. Hiromi
 CC group: Staff Pers.area: LC00 Main Campus
 Subgroup: Non Exempt 3... Pers. subarea: 0001 Loc F1
 Start: LC/CC/2C2C 12/31/9999

Address

Address type: 1 Permanent Residence
 Care Of: 30000212
 Address Line 1: 123 Main St.
 Address Line 2:
 City: Lexington
 State/cp code: KY Kentucky 40509
 Country Key: US United States
 Telephone Number: 859 223 4567

Communications

Type	Number	Extension
CELL	859 338-1111	
Number		
Number		
Number		

Slide 42 - Slide 42

Create Addresses (0006) (Continued)

The **Additional fields** section must be fully completed as well.

County is referring to the county of the home residence.*

Mail code (org unit) will auto-populate with the employee's Organizational Unit number. This value is required; do not remove or change this value.

Additional fields		
County	034	Fayette
Mail code (org unit)	30000212	Registrar
Privacy Flag	<input checked="" type="checkbox"/>	
County of Employment	034	Fayette
District	4	

Click in the checkbox next to **Privacy Flag**, especially if the employee requests that their home address not be found in the Campus Directory, etc.

The **County of Employment** must also be completed.*

The **District** field will auto-populate after the county fields are completed and you press **Enter**.

*See next slide for information on the county fields.

Slide 43 - Slide 43

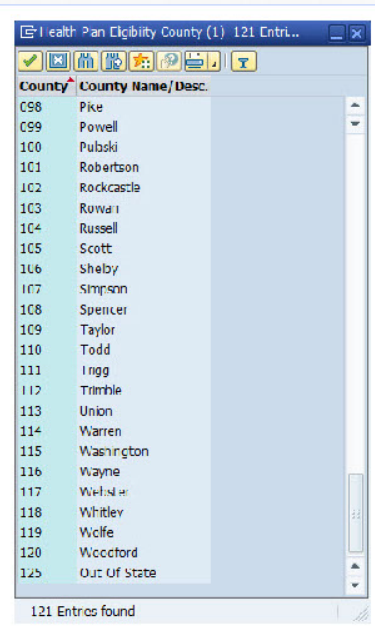
Create Addresses (0006) (Continued)

Both of the county fields require a three-digit number corresponding to the correct county.

Any time you click on the **Possible Entries** icon to search for the value, regardless of the **State** value entered, only Kentucky counties will be listed.

Double-click on the desired value to select.

If the employee's address is not in Kentucky, scroll to the very bottom of the list and select the **125 Out Of State** value.



Slide 44 - Slide 44

Create Addresses (0006) (Continued)

Once all information is entered on the **Create Addresses (0006)** screen, press **Enter**, and then click on the **Save** icon to continue.

The screenshot shows the 'Create Addresses (0006)' window with the following data:

Person Information	
Person ID	0000110
Name	Boyetzka, E. Ellison
Person	Staff
Person	0000 Main Campus
Person	0000 Main Campus
Person	0000 Main Campus
Person	0000 Main Campus

Address Information	
Address Use	1 Permanent residence
Case Of	00000212
Address Line 1	70 Main St.
Address Line 2	
City	Franklin
State/Prov. Code	KY 10100000
Country Key	US United States
Postal Code	40301-1000

Outgoing Data	
Type	0000
Number	0000
Extension	0000
Type	0000
Number	0000
Extension	0000
Type	0000
Number	0000
Extension	0000

Additional Fields	
Comments	0000
Mail Code (org unit)	00000000
Privacy Flag	0000
County of Employment	0000
City	0000

Create Addresses (0006) (Continued)

The **Create Addresses (0006)** infotype will appear again, but the **Address type** is now the **Work Address**.

Complete all fields, including any other types of phone numbers in the **Communications** section.

Once completed, press **Enter**, double-check all information, check the **Status Bar** for any system messages, and then click on the **Save** icon.

NOTE: The employee can maintain this address via the myUK Employee Self Service tab, but this step will create the starting record.

Create Addresses (0006)
Foreign address

Person ID: 09001419 Pers.Assign: 00029252 50105137 00029252..

Name: Krysztina F. Wilson Empl. %: 100.00

FF group: Staff Pers.area: 1000 Main Campus

EE subgroup: 06 Non-Exempt 3. Pers.subarea: 0001 Rag FT

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

Address

Address type: 7 Work Address

Care Of:

Address Line 1: 630 S. Broadway, Room 123

Address Line 2:

City: Lexington

State/zip code: KY Kentucky 40506

Country Key: US United States

Telephone Number: 859 323-8639

Communications

Type	FAX	Number	Extension
		859 323-1234	

Create Planned Working Time (0007)

On the **Create Planned Working Time (0007)** infotype, simply press **Enter** to populate the values.

Verify the data (see next slide for more information).

Once the information is all correct, press **Enter**, check the **Status Bar** for any system messages, and then click on the **Save** icon to continue.

Create Planned Working Time (0007)

Work schedule

Person ID: 39703419 Pers. Assign: 00029252 50105137 00029252

Name: Krysztine F. Wilson

EE group: Staff Pers. area: 1003 Main Campus

EE subgroup: Non-Exempt 3... Pers. subarea: 0001 Reg FT

Start: 10/01/2020 Termination: 12/31/9999

Work schedule rule

Work schedule rule: FI20 7.5 h/d 37.5 h/w M-F

Time Mgmt status: 1:1 Time evaluation of actual times

Working week: 01 Working Week Sunday - Saturday

Part-time employee

Working time

Employment percent: 100.00

Daily working hours: 7.50

Weekly working hours: 37.50

Monthly working hrs: 162.50

Annual working hours: 1950.00

Weekly workcys: 5.00

Dyn. daly work schedule

Min. Max. Min. Max. Min. Max. Min. Max.


Create Planned Working Time (0007)

(Continued)

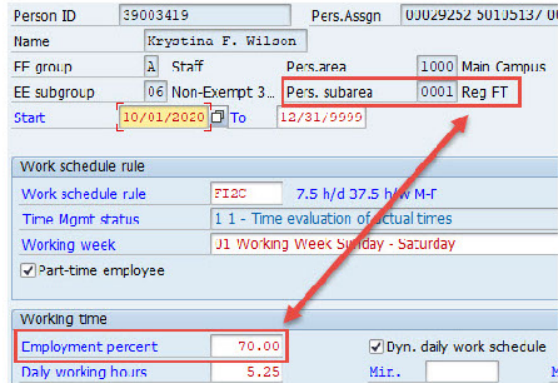
The Employee's **Personnel subarea** must be consistent with the **Employment percent** or an error message will appear.

The **Employment percent** always defaults to **100.00** when the **Enter** key is pressed. This can be changed in order to fall within the required employment percentage range. (See next slide for chart.)

A red error message will appear in the **Status Bar** if the **Employment percent** value does not work with the **Personnel subarea**.

 Employment percentage range must be between 100.00 and 100.00

Once all information is correct, press **Enter**, and then click on the **Save** icon.



Person ID	39003419	Pers.Assgn	0J029252 501J513/ 01
Name	Kristina F. Wilson		
FF group	A Staff	Pers.area	1000 Main Campus
EE subgroup	06 Non-Exempt 3...	Pers. subarea	0001 Reg FT
Start	10/01/2020	To	12/31/9999
Work schedule rule			
Work schedule rule	FI2C	7.5 h/d 37.5 h/w M-F	
Time Mgmt status	1 1 - Time evaluation of actual times		
Working week	J1 Working Week Sunday - Saturday		
<input checked="" type="checkbox"/> Part-time employee			
Working time			
Employment percent	70.00	<input checked="" type="checkbox"/> Dyn. daily work schedule	
Daly working hours	5.25	Mir.	

Slide 48 - Slide 48

Employment Percentage Chart

This chart shows the allowed percentage(s) for each Personnel Subarea (PSA).

FTE = Employment Percentage

PSA Code	PSA Text	Allowed FTE
0001	Reg FT	1.0
0002	Reg PT (Faculty)	.20 - .99
0003	Reg PT >.74	.75 - .99
0004	Reg PT .5 to .74	.50 - .74
0005	Reg PT .2 to .49	.20 - .49
0006	Temp FT	1.0
0007	Temp PT >.20	.20 - .99
0013	Temp PT <.20	< .20
0008	WEPP	Always .60
0009	Reg On Call	Always .20
0010	Prem On Call	Always .20
0011	Unpaid	n/a
0012	Non-Service	n/a

Slide 49 - Slide 49

Create Basic Pay (0008)

In the **Amount** field on the **Create Basic Pay (0008)** infotype, enter the correct dollar amount based on the value listed in the **Wage Type Long Text** field (Hourly Rate, Monthly Rate, Biweekly, etc.).

Press **Enter**, which will populate the **Annual (Ann.)salary** and **True Annual Salary** fields.

Double-check all data, and then click on the **Save** icon.

Create Basic Pay (0008)

Person ID: 09002119 Dem. Acgr: 00009202 00009137 00029202

Name: Acyeteiba E. Wilson Impl. No: 100000

HR group: A Staff Plant: 4000 Main Campus

HR sub-group: 00 Non-employee Basic sub-area: 0001 40g-1

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

Subtype: Basic contract

Salary:

Cap. util. M: 130.00

PS type: 02 Hourly Wage type: 0001 Biweekly

PS Area: 01 Multi Campus

PS group: 41 Level: 01 Annual salary: 32,150.00 TRN

Wage Type Long Text	Amount	Curr...	L. A.	Number/Unit	Unit
0001 Hourly Rate	17.60	USD	<input checked="" type="checkbox"/>		
		USD	<input type="checkbox"/>		
		USD	<input type="checkbox"/>		
		USD	<input type="checkbox"/>		

True Annual Salary: 32,150.00 Override Salary:

NOTE: For future reference, the **PS group** field contains the grade level for the employee's position (41 in this example).

Create Basic Pay (0008) (Continued)

The **Annual** and **True Annual Salary** fields should be the same for all employees, except for 9- and 10-month deferred Faculty. Their actual, contracted, annual salary will be seen in the **True Annual Salary** field only.

The **Override Salary** field is used in one of two ways:

- If an employee is in an “acting” position and the department is **not** paying benefits on the additional acting money, they can enter an **Override Salary** amount to bring it back down to the “pre-acting” pay; or
- If an employee is in a flex leave position and does not work during the summer months, the **Override Salary** may be used to reduce the annual salary that is reflected.
- The impact is on basic and optional life insurance coverage.
- Contact HR Compensation with any questions.

Change Date Specifications (0041)

Verify that the information on the **Change Date Specifications (0041)** infotype is correct, and then click on the **Save** icon to continue.

Change Date Specifications (0041)

Person ID: 39003419 Pers.Assgn: 00029252 50105137 00029252 ...

Name: Krystina F. Wilson Empl. %: 100.00

EE group: A Staff Pers.area: 1000 Main Campus

EE subgroup: 06 Non-Exempt 3... Pers. subarea: 0001 Reg FT

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

Date Specifications (0041)

Date type	Date	Date type	Date
01 Original Hire Date	10/01/2020	02 Current Hire Date	10/01/2020
03 Reg Service Date	10/01/2020	05 Vacation Svc Date	10/01/2020

If the information is incorrect or you have any questions about what you are seeing, contact HR Compensation. Do not change the dates yourself!

Slide 52 - Slide 52

Create Additional Personal Data (0077)

On the **Create Additional Personal Data (0077)** infotype, complete as much information as possible.

Select the **Ethnicity**.

- If the **Hispanic/Latino** ethnicity is selected, a **Race Category** is not required.
- If the **Not Hispanic/Latino** ethnicity is selected, a **Race Category** is required. Multiple race categories may be selected as appropriate.

Complete the **Military** and **Veteran Status** sections, if known.

Once completed, press **Enter**, check for system messages, and then click on **Save**.

Create Additional Personal Data (0077)

Person ID: 39003419 Pers.Asson: 00029252 5010513/ 00029252

Name: Kivesana F. Wilson Empl. %: 100.00

RT group: Staff Pers.area: 1000 Main Campus

Hb subregion: Non-empt 3 Pers. subarea: 001 Res: 1

Start: 10/01/2020 To: 12/31/9999

Additional Personal Data

Ethnicity (NEW): E2 Not Hispanic/Latino

Race Data

Race Category

American Indian or Aleutian Native

Asian

Black or African American

Native Hawaiian or Other Pacific Islander

White

Military status

Beneficiary Identification Number

Veteran Status

Protected Veteran

Not a Protected Veteran

Prefers Not to Answer

Non-Veteran

Slide 53 - Slide 53

PA Action Completed

Upon completing and saving the last infotype for a PA Action, the system will return to the initial (PA40) **Personnel Actions** screen. The Action is completed!

TIP: Write down the employee's **Personnel Number** and the **Start** date! This information is needed for generating the PAR, which is the next step in the process.

Personnel Actions

Person ID	39003419	Pers. Assgn	00029252	50105137 00029252...
Name	Krystina F. Wilson		Empl. %	100.00
EE group	A Staff	Pers. area	1000	Main Campus
EE subgroup	06 Non-Exempt	Pers. subarea	0001	Reg FT
Start	10/01/2020			

Personnel Actions			
Action Type	Personn...	EE group	EE subg...
Main Campus Create Assignment			
Hospital Create Assinment			

Recovering from an Interruption

Should you ever be returned to the initial **Personnel Actions** screen prior to fully completing an Action, use the steps listed on the next slide to recover from the interruption.

A couple possible reasons for the interruption:

- The power goes out to your PC.
- You accidentally click on the **Back** icon in the Standard Toolbar.

For a New Hire Action:

- You can recover, if the first three infotypes were completed and saved: Actions (0000), Personal Data (0002), and Organizational Assignment (0001).
- If only part of these three infotypes were completed and saved, contact HR Compensation for assistance.

Slide 55 - Slide 55

Recovering from an Interruption (Continued)

To recover from an interruption while processing an Action:

1. Enter the employee's **Person ID** and press **Enter**
2. Enter the same **Start** date used previously
3. Select the same **Action Type** used previously
4. Click on the **Execute** icon

The screenshot shows the 'Personnel Actions' window. It contains a form with the following fields and values:

Person ID	39003419	Pers.Assgn	00029252 50105137 00029252...
Name	Kristina E. Wilson	Empl %	100.00
Emp group	A Staff	Pers.area	1000 Main Campus
Emp subgroup	06 Non-Exempt 3	Pers.subarea	0001 Req H-I
Start	10/01/2020		

Below the form is a table of 'Personal Actions':

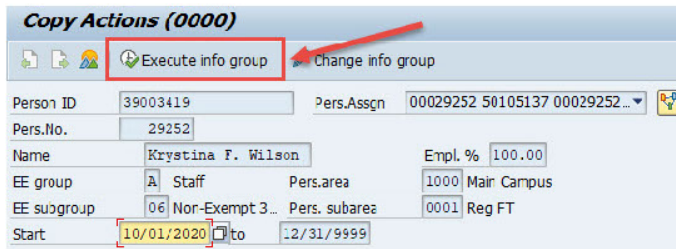
Action Type	Personn...	CC group	CC subg...
Main Campus Create Assignment			
Local Create Assignment			
Person Update			
Change in Status			

Red callouts are present: 1 points to the Person ID field, 2 points to the Start date field, 3 points to the 'Main Campus Create Assignment' row in the table, and 4 points to the Execute icon in the top left corner.

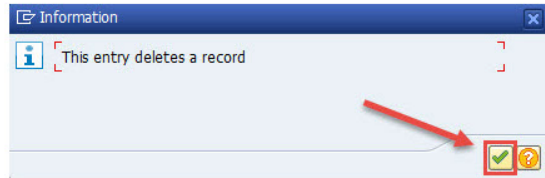
Recovering from an Interruption (Continued)

The **Copy Actions (0000)** infotype will appear.

5. Click on the **Execute info group** button in the Application Toolbar



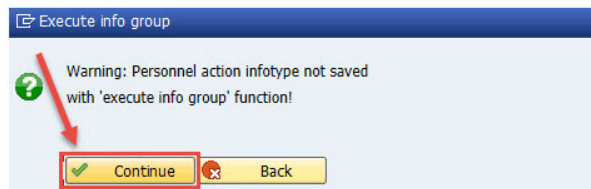
If this **Information** window appears, click on the green **Continue** icon. Nothing will be deleted!



Slide 57 - Slide 57

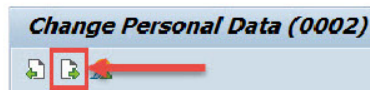
Recovering from an Interruption (Continued)

6. Click on the **Continue** button on the **Execute info group** window



The **Change Personal Data (0002)** infotype will appear.

7. Click on the **Next Record** icon for each infotype previously completed and saved until you reach the infotype where you need to resume.



Be sure to save any changes you might make to an infotype that was previously completed and saved before the interruption! Complete the remaining infotypes as originally instructed until the Action is completed.

Slide 64 - Slide 64

Unit 3 - Additional PA Action Infotypes



Slide 65 - Slide 65

Unit Overview

The purpose of this unit is to give information and instructions for completing some additional infotypes that:

- Will appear for certain New Hire Actions; and
- May or may not appear when delimiting an employee's assignment or processing other various Actions.

Slide 66 - Slide 66

Create Contract Elements (0016)

The **Create Contract Elements (0016)** infotype will appear only for Faculty when processing the New Hire Action.

Click on the drop-down icon in the **Contract Type** field, select the appropriate value, press **Enter**, and then click on the **Save** icon to continue.

Create Contract Elements (0016)

Maintain activities

Person ID: 10001836 Pers.Assgn: 00000318 50101528 00000318...

Name: Christopher A Montoya Empl. %: 100.00

EE group: C Faculty Pers.area: 1000 Main Campus

EE subgroup: 03 Exempt Monthly Pers. subarea: 0001 Reg FT

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

Contract Type: 09 Nine Month, 10 Ten Month, 11 Eleven Month, 12 Twelve Month, OT Other

Slide 67 - Slide 67

Create Hospital Salary (9002)

The **Create Hospital Salary (9002)** infotype will appear for Hospital/Healthcare New Hires only.

Leave the **As of date** field in the **Employee experience** section **blank**. UKHC Payroll will fill it in after the assignment has been completed.

Select the appropriate **Education (for nurses only)**, press **Enter**, and then click on the **Save** icon to complete this infotype and continue.

Contact UKHC Payroll with any questions.

Create Hospital Salary (9002)	
Person ID	10001746
Pers.Assgn	00000220 50:2257: 00000220
Name	Joseph Theodore Baker
Emp. %	100.00
CC group	A Staff
Pers.area	1E00 Healthcare
EE subgroup	04 Exempt Biweek. Pers. subarea
Req FT	DC01
Start	10/01/2020

Employee experience	
As of date	

Education (for nurses only)	
No degree	<input checked="" type="radio"/>
ADN	<input type="radio"/>
BSN	<input type="radio"/>
MSN	<input type="radio"/>

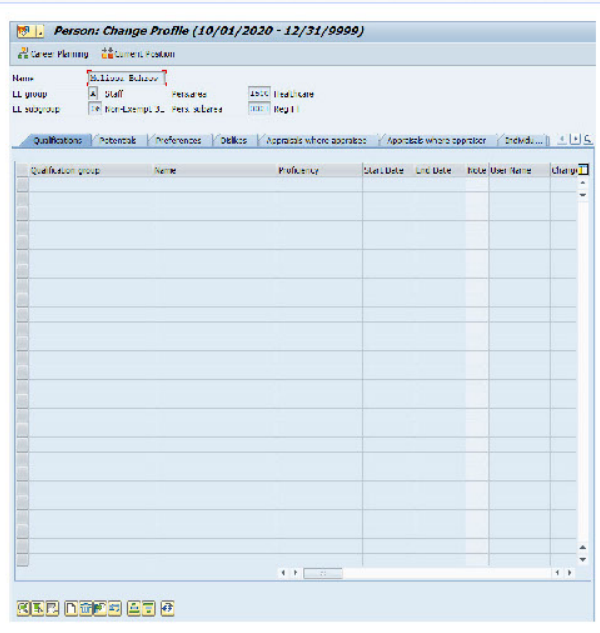
* For all other education use infotype 0024 (Skills) *

Slide 68 - Slide 68

Person: Change Profile

The **Person: Change Profile** screen will appear for Hospital/Healthcare New Hires only as well.

Just click on the green **Back** icon in the Standard Toolbar to continue.



Display Main Personnel Assignment (0712)

The **Display Main Personnel Assignment (0712)** infotype is used for anyone with concurrent employment (additional/overload assignments).

It is presented as display only for end users.

The HR Benefits Office maintains this infotype, if the main assignment needs to be changed.

Use the **Next Record** icon in the Application Toolbar to skip, should it appear during an Action.

Display Main Personnel Assignment (0712)

Name: Melissa Buhrow Empl. %: 100.00

EE group: A Staff Pers.area: 1500 Healthcare

EE subgroup: 06 Non-Exempt 3... Pers. subarea: 0001 Reg FT

Grouping Reason: MAIN Main Assignment Chng: 09/30/2020 KREAGER

Grouping value / period / main personnel assignment	Employment
CP	
01/01/1800 - 12/31/9999	
00029253	50114700 00029253 (Active)

Slide 70 - Slide 70

Create Faculty Salaries (9017)

The **Create Faculty Salaries (9017)** infotype will appear when processing a (Leave Of Absence) **LOA with Pay Action** to capture the “original base” salary of faculty members who are going on a leave of absence with partial pay.

Enter the faculty member’s annual salary that was effective prior to their leave of absence in the **On Leave Base Salary** field, press **Enter**, and then click on the **Save** icon.

This infotype will not drive any payroll information, but will be used for Integrated Postsecondary Education Data System (IPEDS) reporting.

Create Faculty Salaries (9017)			
Person ID	10001836	Pers.Assgn	00000318 50101528 00000318...
Name	Christopher A Montoya	Empl. %	100.00
EE group	C Faculty	Pers.date	1000 Main Campus
EE subgroup	03 Exempt Monthly	Pers. subarea	0001 Reg FT
SLeit	10/01/2020	To	12/31/9999
Faculty Salaries (9017)			
On Leave Base Salary	96,000.00		

NOTE: When processing the **Return From Leave with Pay Action**, this infotype will be presented during the Action to be delimited.

Slide 71 - Slide 71

Delimit Long Distance Access (9020)

The **Delimit Long Distance Access (9020)** infotype may be presented during the Separation Action and must be delimited.

To delimit the infotype, click on the gray selection box to select the record (1), and then click on the **Delimit** icon in the Application Toolbar (2).

Delimit Long Distance Access (9020)

Person ID: 39003425 Pers.Assgn: 00029253 50114700 00029253...

Name: Melissa Buhrow Empl. %: 100.00

EE group: A Staff Pers.area: 1500 Healthcare

EE subgroup: 06 Non-Exempt 3... Pers. subarea: 0001 Reg FT

Choose: 11/01/2020 To: 12/31/9999 STy.: Delimit.Date: 11/01/2020

Start Date	End Date	LD Access
10/01/2020	12/31/9999	100 Domestic Long Distance

Slide 72 - Slide 72

Delimit Cost Distribution (0027)

The **Delimit Cost Distribution (0027)** infotype may or may not appear when processing an Action that is ending a current assignment.

The infotype lists the Cost Object(s) an employee is paid from each pay period.

To delimit this record, if applicable, click on the gray selection box next to all lines to be delimited (1), and then click on the **Delimit** icon in the Application Toolbar (2).

Delimit Cost Distribution(0027)

Person ID: 39C03425 Pers. Assign: 00029253 50114/00 00029253...

Name: Melisse Bulrow Empl. %: 100.00

EE group: Staff Pers. area: 1500 Healthcare

EE sub group: Non-Exempt 3. Pers. subarea: 0001 Reg FT

From: 11/01/2020 To: 12/31/9999 STy.: Delimit Date: 11/01/2020

	Name	Start Date	End Date	CoCd	BusA	Cost Center	Cctr text	Prct
<input type="checkbox"/>	01	Bulrow/Melisse	10/01/2020	12/31/9999	UK00 01C1	101200081C	NJRSTNG ADM..	100.00

To not delimit any lines, click on the **Next Record** icon in the Application Toolbar.

Delimit Recurring Payments/Deducts (0014)

The **Delimit Recurring Payments/Deducts (0014)** infotype may or may not appear when processing an Action that is ending a current assignment.

This infotype will list two different Wage types:

- 2xxx – Recurring payments made by the employee’s department (Incentives, Allowances, etc.)
- 4xxx – Recurring deductions processed from outside the employee’s department (E permit, United Way, UKFCU, etc.)

Delimit Recurring Payments/Deductions (0014)

Person ID: 10010022 Pers.Assgn: 00009004 50110614 00009004

Name: Oscar J. Tryston Empl. %: 100.00

EE group: Staff Pers.area: 1000 Main Campus

EE subgroup: Exempt Monthly Pers. subarea: 0001 Reg FT

Chose: 11/01/2020 to 12/31/9999 Sty. Delimit.Date: 11/01/2020

Wage type	Wage Type Long Text	From	To	A	Amount	Ctry
4020	Parking Monthly	12/01/2005	12/31/9999	A	0.00 USD	
4100	Credit Union	12/01/2005	12/31/9999	A	230.00 USD	

Slide 74 - Slide 74

Delimit Recurring Payments/Deducts (0014) (Continued)

To delimit the applicable records, click on the gray selection box next to all lines to be delimited (1), and then click on the **Delimit** icon in the Application Toolbar (2).

Wage type	Wage Type Long Text	From	To	O	Amount	Cray
4020	E Parking Mo NS	12/01/2005	12/31/9999	A	0.00	USD
4100	Credit Union	12/01/2005	12/31/9999	A	230.00	USD

NOTE: Delimit all wage type items listed in this infotype when processing a Separation Action!

Slide 75 - Slide 75

Unit 4 - Payroll Authorization Record (PAR)



Payroll Authorization Record (PAR)

A **Payroll Authorization Record (PAR)** is the **paperwork (report)** summarizing the data entered during a PA Action.

Processing a PAR is required at the conclusion of all PA Actions, except the Separation Action.

- For the Separation Action, departments/supervisors should complete the **University of Kentucky Employee Separation Sheet** at:
<https://www.uky.edu/hr/forms/employee-separation-sheet-form>.

The original, signed PAR and one (1) copy must be sent to HR Compensation.

Also, the original of all appropriate, supporting documentation (I-9 form, W4/K4 forms, Salary Recommendation Form, etc.) must be attached to the original, signed PAR. The second PAR is sent by itself with no supporting documents.

Slide 77 - Slide 77

Generating a PAR

1. Enter the transaction code ZHR_PAR
2. Leave **Key Date** listed in the first **Reporting Period** field and click/tab to the field to the right and enter the Start date, which must be the same as the **Start** date entered on the initial screen for the Action
3. Enter the employee's **Personnel Number**
4. Enter your contact information and any other **Comments** as needed (Comments do print on the PAR!)
5. Click the **Execute** icon

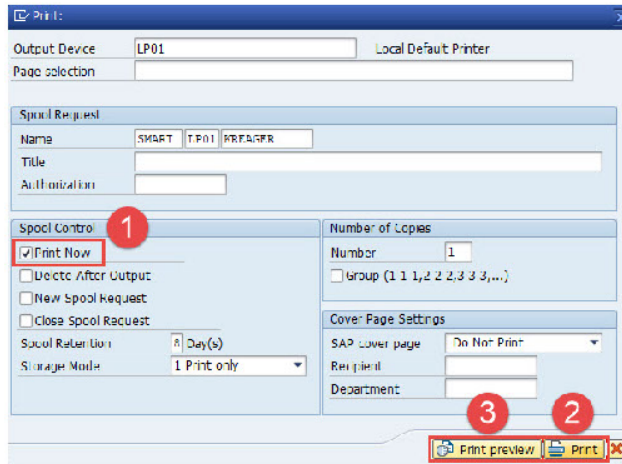
The screenshot shows the 'Personnel Authorization Request' form. It has a header bar with navigation icons and 'OrgStructure' and 'Search Help' links. The form is divided into sections: 'Period', 'Selection Criteria', and 'Comments'. In the 'Period' section, the 'Reporting Period' dropdown is set to 'K Key Date' and the date field to the right contains '10/01/2020'. In the 'Selection Criteria' section, the 'Personnel Number' field contains '00029252'. In the 'Comments' section, the text 'Call Jane Doe at 257-3333 with any questions.' is entered. Red callout boxes with numbers 2, 3, 4, and 5 point to the date field, the Personnel Number field, the Comments text area, and the Execute icon (a green play button) respectively.

Section	Field	Value
Period	Reporting Period	K Key Date
Period	Date	10/01/2020
Selection Criteria	Personnel Number	00029252
Comments	Comments	Call Jane Doe at 257-3333 with any questions.

Slide 78 - Slide 78

Generating a PAR (Continued)

To print the PAR directly from the **Print** window (without previewing it first), click in the checkbox next to **Print now** (1), and then click on the **Print** button (2) in the lower corner.



To review the PAR prior to printing, click on the **Print preview** button (3).

Slide 79 - Slide 79

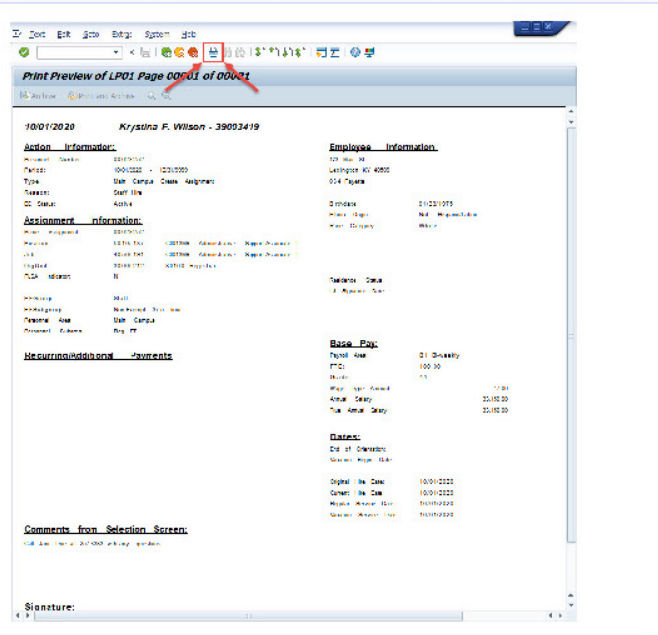
PAR - Print Preview

After reviewing the PAR for accuracy, click on the **Print** icon in the Standard Toolbar to print.

The data contained under each bold/underlined heading on the PAR is coming from various infotypes within the employee's master data.

The Comments entered and the **Signature** line (for the person who will be authorizing the PAR) are located in the lower-left corner of the PAR.

The PAR will print in Landscape orientation.



Slide 80 - Slide 80

PAR - Print Preview (Continued)

If the data from the Action for which you are generating the PAR is not seen on the PAR, this is usually caused by either an incorrect **Start date** and/or **Personnel Number** on the initial screen of this transaction.

Return to the initial screen, make the necessary corrections, and then click on the **Execute** icon...and then the **Print preview** button (in the **Print** window) again.

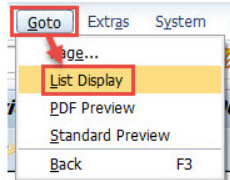
If necessary, you may need to review the employee's master data (via t-code PA20) to gather the correct information. Then return to t-code ZHR_PAR and generate the PAR again.

Contact HR Compensation with any questions regarding this transaction.

Saving a PAR (Optional)

Although you can always view/print a PAR at any time using the ZHR_PAR transaction, you can save it to your computer if desired as follows:

1. Generate the PAR and select the **Print preview** option in the **Print** window
2. Select **Goto --> List Display** from the Menu Bar



The PAR will change to a different format.

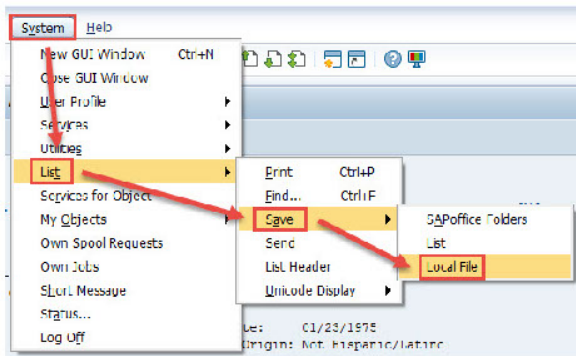
Do not print this version of the PAR to send to HR Compensation. They want them only in the original format.



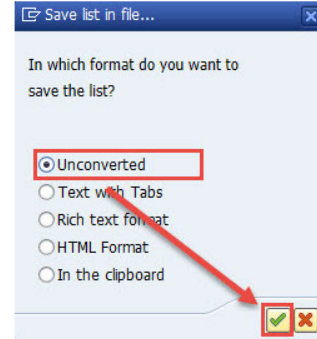
Slide 82 - Slide 82

Saving a PAR (Optional) (Continued)

3. Select System --> List --> Save --> Local File from the Menu Bar



4. Select the **Unconverted** format (system default), then click on the green **Continue** icon

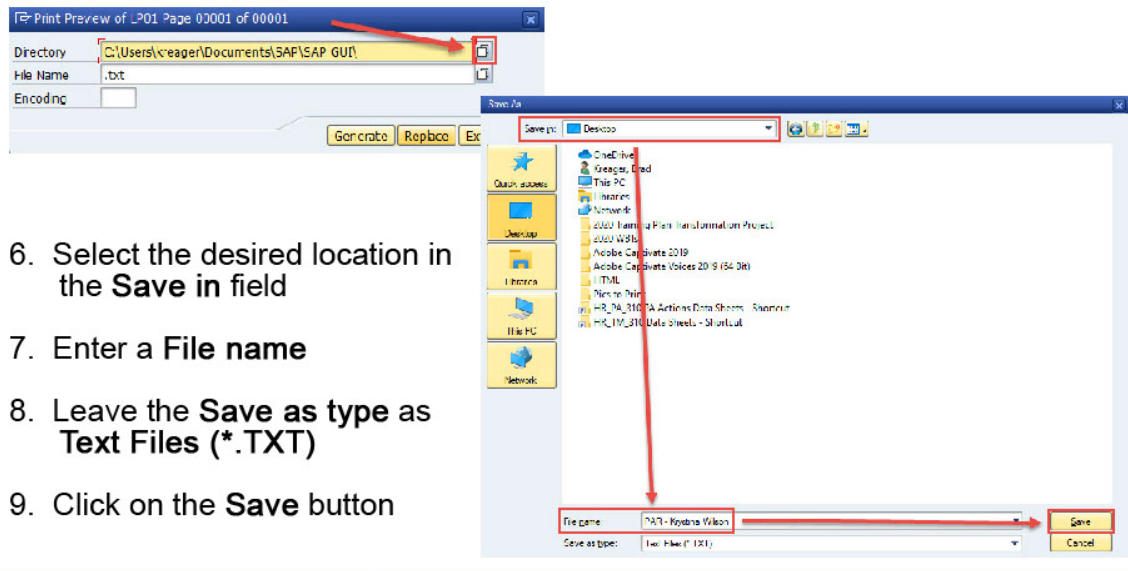


Slide 83 - Slide 83

Saving a PAR (Optional) (Continued)

5. To change the Directory location, click on the Possible Entries icon

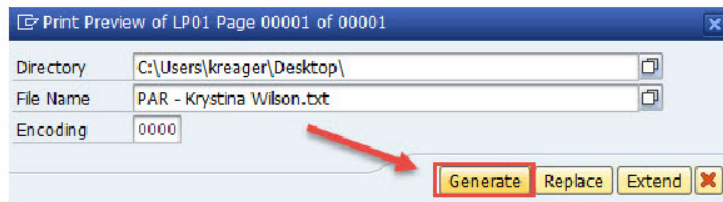
- 6. Select the desired location in the **Save in** field
- 7. Enter a File name
- 8. Leave the **Save as type as Text Files (*.TXT)**
- 9. Click on the **Save** button



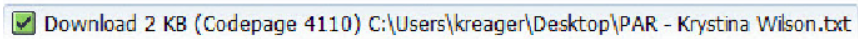
Slide 84 - Slide 84

Saving a PAR (Optional) (Continued)

10. Click on the **Generate** button



The system will display a similar message in the **Status Bar** confirming the saving of the PAR.



PA Actions myHelp Website

A Quick Reference Card (QRC) is available for every PA Action on the myHelp website: myhelp.uky.edu/rwd/HTML/HR/HR_PA_310.html.

These will provide the specific step-by-step instructions for each Action.

The screenshot displays the myHelp website interface. On the left is a vertical navigation menu with categories like Training Plans, Training Sandbox, Reports, Tutorials, WBT Courses, Budget Help, RW Help, FES Help, FT Help, FM Help, GSI Help, HR Help, MM Help, PRC Help, PM Help, SLCM Help, and SN Help. The main content area is titled "HR_PA_310 Personnel Administration Actions" and contains a detailed description of the course. Below the description is a list of "Related Quick Reference Cards (QRC)" with links to various HR actions such as "2100 PA1: Assigning a Job", "2100 PA2: Assigning a Job", "2100 PA3: Assigning a Job", "2100 PA4: Assigning a Job", "2100 PA5: Assigning a Job", "2100 PA6: Assigning a Job", "2100 PA7: Assigning a Job", "2100 PA8: Assigning a Job", "2100 PA9: Assigning a Job", "2100 PA10: Assigning a Job", "2100 PA11: Assigning a Job", "2100 PA12: Assigning a Job", "2100 PA13: Assigning a Job", "2100 PA14: Assigning a Job", "2100 PA15: Assigning a Job", "2100 PA16: Assigning a Job", "2100 PA17: Assigning a Job", "2100 PA18: Assigning a Job", "2100 PA19: Assigning a Job", "2100 PA20: Assigning a Job", "2100 PA21: Assigning a Job", "2100 PA22: Assigning a Job", "2100 PA23: Assigning a Job", "2100 PA24: Assigning a Job", "2100 PA25: Assigning a Job", "2100 PA26: Assigning a Job", "2100 PA27: Assigning a Job", "2100 PA28: Assigning a Job", "2100 PA29: Assigning a Job", "2100 PA30: Assigning a Job", "2100 PA31: Assigning a Job", "2100 PA32: Assigning a Job", "2100 PA33: Assigning a Job", "2100 PA34: Assigning a Job", "2100 PA35: Assigning a Job", "2100 PA36: Assigning a Job", "2100 PA37: Assigning a Job", "2100 PA38: Assigning a Job", "2100 PA39: Assigning a Job", "2100 PA40: Assigning a Job", "2100 PA41: Assigning a Job", "2100 PA42: Assigning a Job", "2100 PA43: Assigning a Job", "2100 PA44: Assigning a Job", "2100 PA45: Assigning a Job", "2100 PA46: Assigning a Job", "2100 PA47: Assigning a Job", "2100 PA48: Assigning a Job", "2100 PA49: Assigning a Job", "2100 PA50: Assigning a Job", "2100 PA51: Assigning a Job", "2100 PA52: Assigning a Job", "2100 PA53: Assigning a Job", "2100 PA54: Assigning a Job", "2100 PA55: Assigning a Job", "2100 PA56: Assigning a Job", "2100 PA57: Assigning a Job", "2100 PA58: Assigning a Job", "2100 PA59: Assigning a Job", "2100 PA60: Assigning a Job", "2100 PA61: Assigning a Job", "2100 PA62: Assigning a Job", "2100 PA63: Assigning a Job", "2100 PA64: Assigning a Job", "2100 PA65: Assigning a Job", "2100 PA66: Assigning a Job", "2100 PA67: Assigning a Job", "2100 PA68: Assigning a Job", "2100 PA69: Assigning a Job", "2100 PA70: Assigning a Job", "2100 PA71: Assigning a Job", "2100 PA72: Assigning a Job", "2100 PA73: Assigning a Job", "2100 PA74: Assigning a Job", "2100 PA75: Assigning a Job", "2100 PA76: Assigning a Job", "2100 PA77: Assigning a Job", "2100 PA78: Assigning a Job", "2100 PA79: Assigning a Job", "2100 PA80: Assigning a Job", "2100 PA81: Assigning a Job", "2100 PA82: Assigning a Job", "2100 PA83: Assigning a Job", "2100 PA84: Assigning a Job", "2100 PA85: Assigning a Job", "2100 PA86: Assigning a Job", "2100 PA87: Assigning a Job", "2100 PA88: Assigning a Job", "2100 PA89: Assigning a Job", "2100 PA90: Assigning a Job", "2100 PA91: Assigning a Job", "2100 PA92: Assigning a Job", "2100 PA93: Assigning a Job", "2100 PA94: Assigning a Job", "2100 PA95: Assigning a Job", "2100 PA96: Assigning a Job", "2100 PA97: Assigning a Job", "2100 PA98: Assigning a Job", "2100 PA99: Assigning a Job", "2100 PA100: Assigning a Job". On the right side, there is a "Related Links" section with links to "Competition", "Employee Behavior", "Employee", "Human Resources", and "20 Information".

PA Actions Assessment

After successfully completing this WBT, you will then be **required** to perform and pass a hands-on assessment in the **Training Sandbox** in order to receive full credit for this course and the associated access in the Production System.

The **PA Actions Assessment** involves the processing of five (5) frequently performed Actions, as well as generating and saving the corresponding PARs for each Action. The Actions are:

- **New Hire**
- **Additional Assignment**
- **End of Additional Assignment**
- **Position Change**
- **Separation** (You will do a PAR for this Action for assessment purposes only. As discussed earlier in this course, normally a PAR is not generated after completing this Action in the Production System.)

Slide 94 - Slide 94

PA Actions Assessment (Continued)

In order to complete this hands-on assessment, you will need to request the **PA Actions Assessment Guide** and a **PA Actions Data Sheet**.

- The **PA Actions Assessment Guide** provides all of the instructions and information necessary to complete the assessment.
- The **PA Actions Data Sheet** contains specific values that must be entered in certain fields when performing the Actions.

To obtain these documents, send an e-mail to IRISSupport@uky.edu with “**PA Actions Assessment Request**” in the Subject line only.

You should receive these documents within 1-2 business days, if not sooner.

Please go ahead and complete this WBT while you are waiting to receive these documents!

PA Actions Practice Guide (Optional)

In addition to the two documents required for the PA Actions Assessment, we will also send you the **PA Actions Practice Guide**.

This document contains a series of hands-on Actions that you can perform in the Training Sandbox, which will help reinforce the key learning objectives covered in this course and prepare you for the assessment.

There is separate data for these exercises on your PA Actions Data Sheet.

The practice guide is optional! It is not a requirement for completing this course! However, we strongly recommend that you go through each exercise to familiarize yourself with a few of the key Actions and the PAR transaction prior to completing the PA Actions Assessment.

The PA Actions Assessment is required! You must successfully complete the assessment in order to receive credit for the PA Actions course and the associated access in the Production System!

Slide 96 - Last Slide

The End

Congratulations, you have successfully completed this training course!



You may now close this course window and return to your myUK Learning Home page. The course should be listed in your "Learning History" tile, which contains all successfully completed courses.