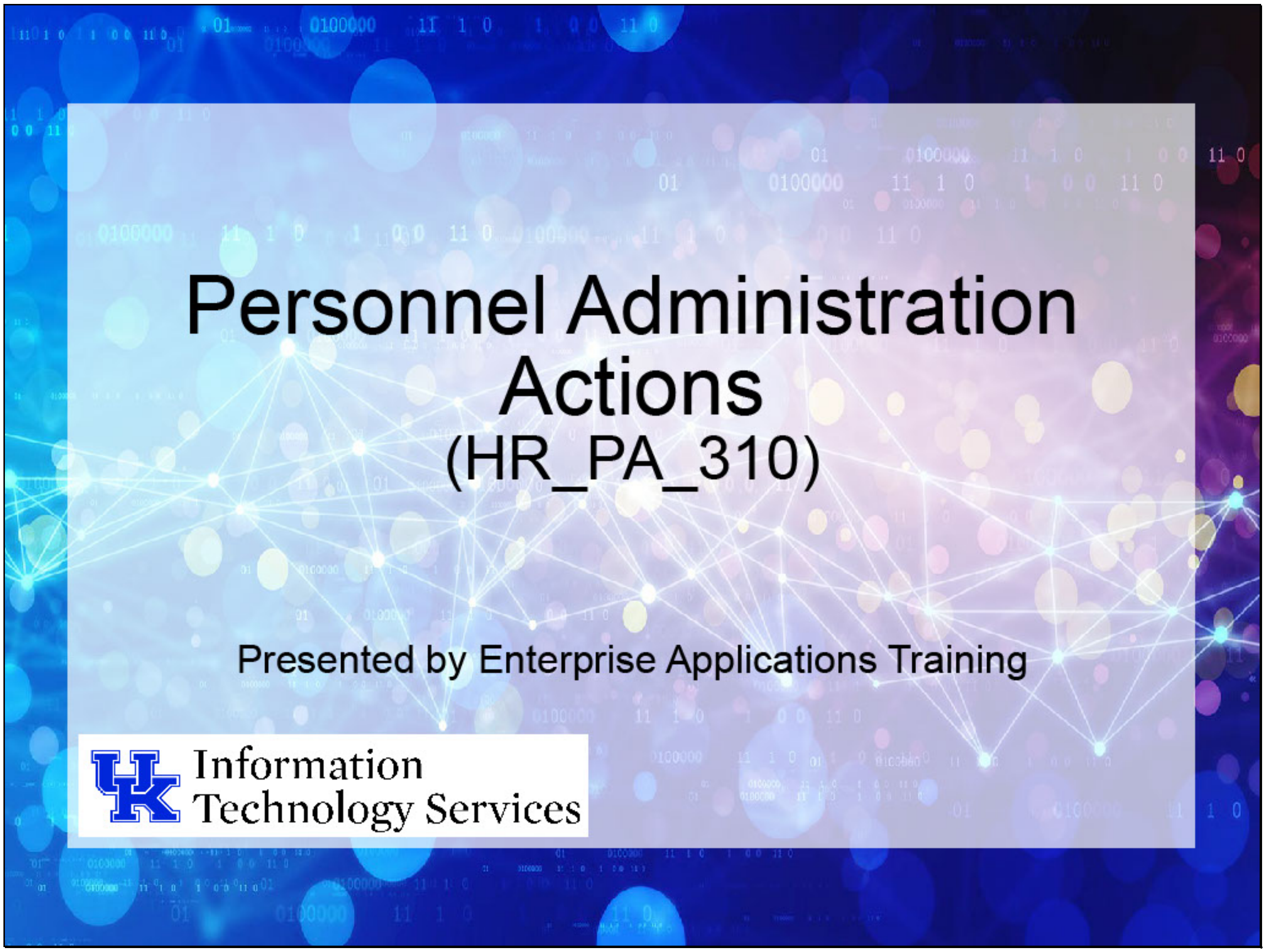
Slide 1 - Title Slide



Slide 4 - Slide 4

Course Content

Unit 1: Introduction

Unit 2: Personnel Administration Actions

Unit 3: Additional PA Action Infotypes

Unit 4: Payroll Authorization Record (PAR)

PA Actions myHelp Website

PA Actions Assessment & Practice Guide Information

Slide 5 - Unit Intro Slide

Slide 6 - Slide 6

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 <u>not</u> 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

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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.

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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

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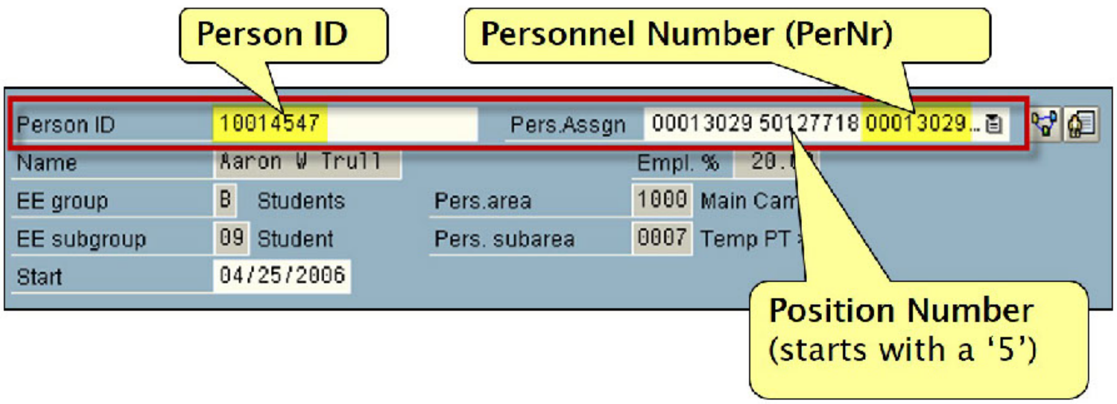
Person ID & Personnel Number (Continued)

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).



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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

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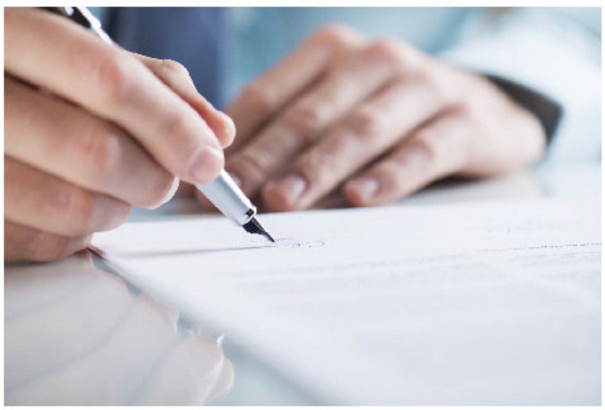
PA Actions (Continued)

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.)



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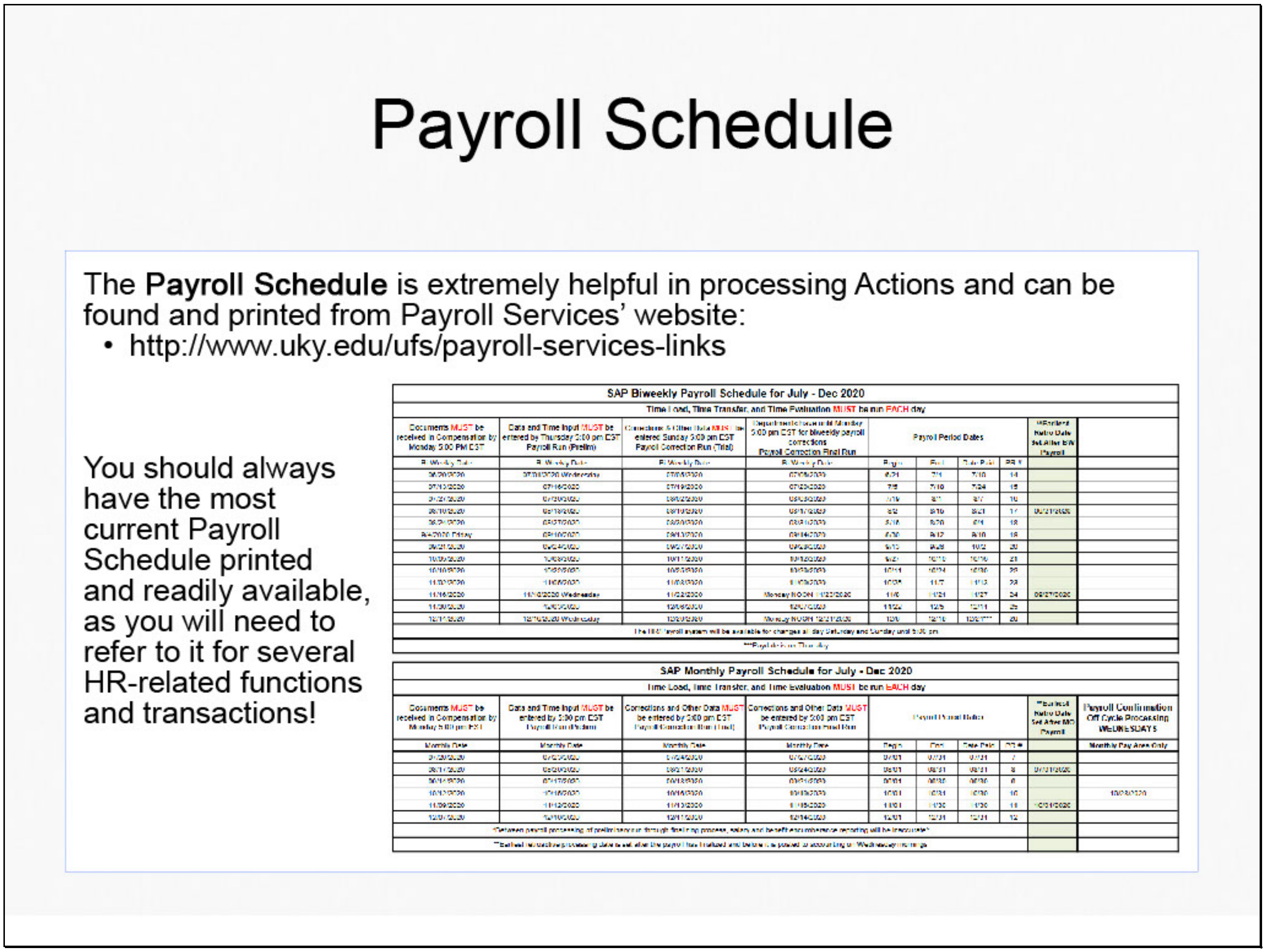

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Payroll Schedule (Continued)

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	
07/1[illegible]2020	07/16/2020	07/19/2020	07/20/2020	7/5	7/18	7/24	15	
07/[illegible]2020	07/30/2020	08/02/2020	08/03/2020	7/19	8/1	8/7	16	
08/1[illegible]2020	08/13/2020	08/16/2020	08/17/2020	8/2	8/15	8/21	17	06/21/2020
08/24/2020	08/27/2020	08/30/2020	08/31/2020	8/16	8/29	9/4	18	
9/4/2020 Friday	09/10/2020	09/13/2020	09/14/2020	8/30	9/12	9/18	19	

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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!

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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:

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.

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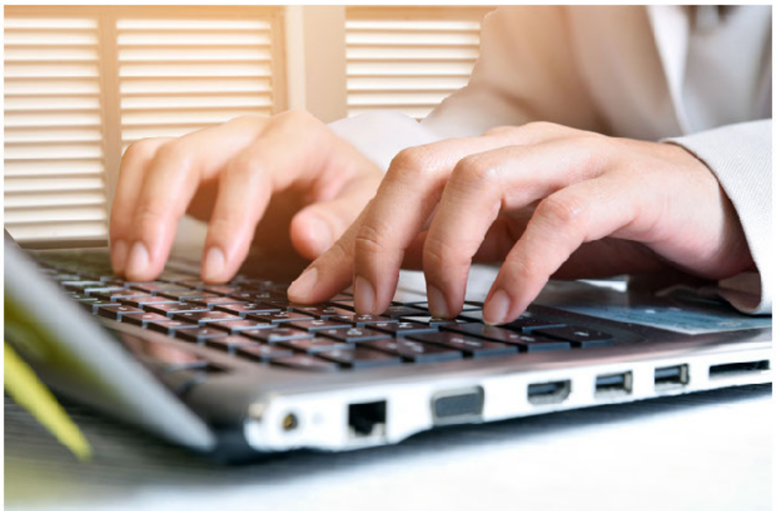
Unit 2 - Personnel Administration Actions



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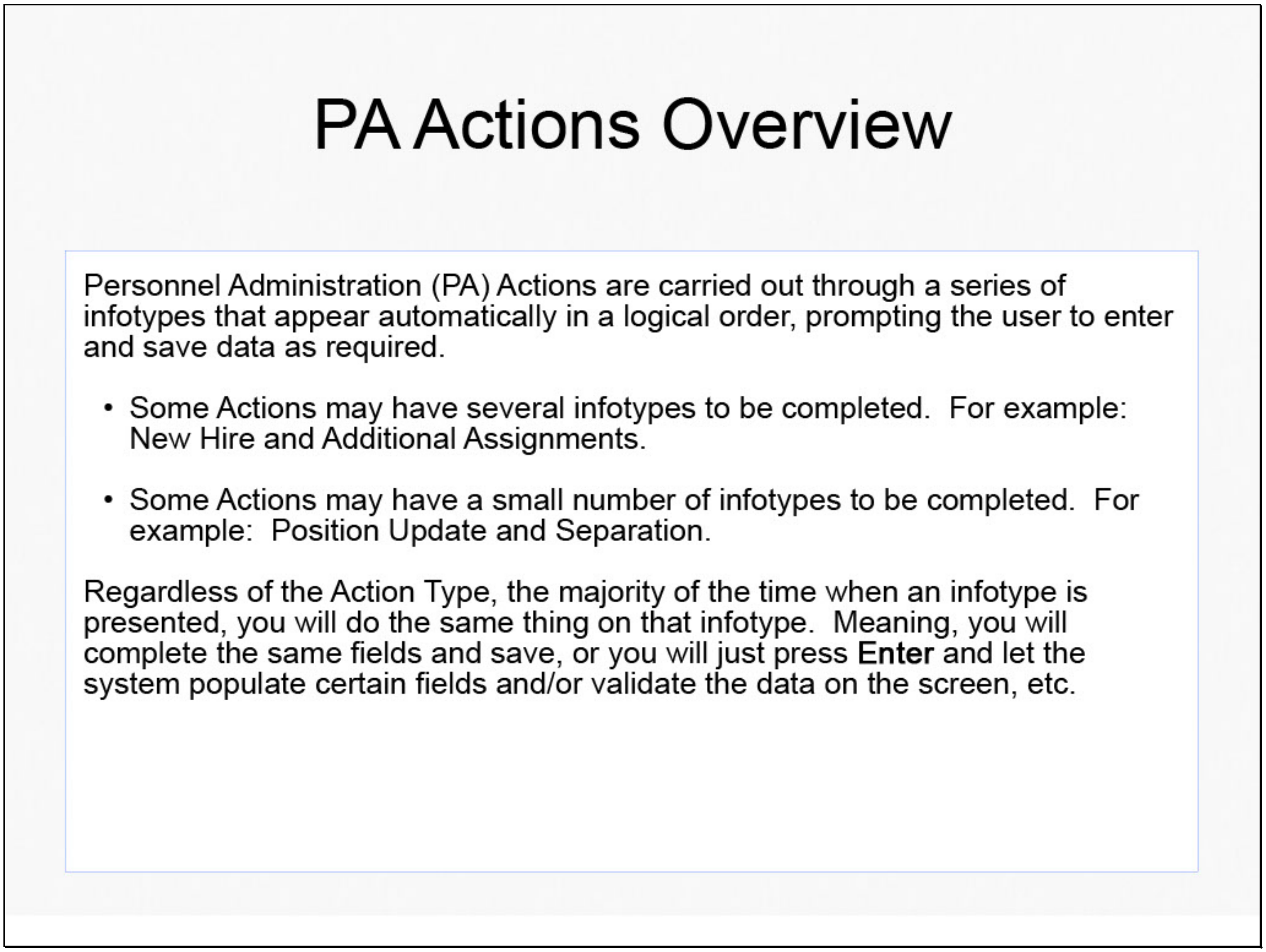

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PA Actions Overview (Continued)

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.

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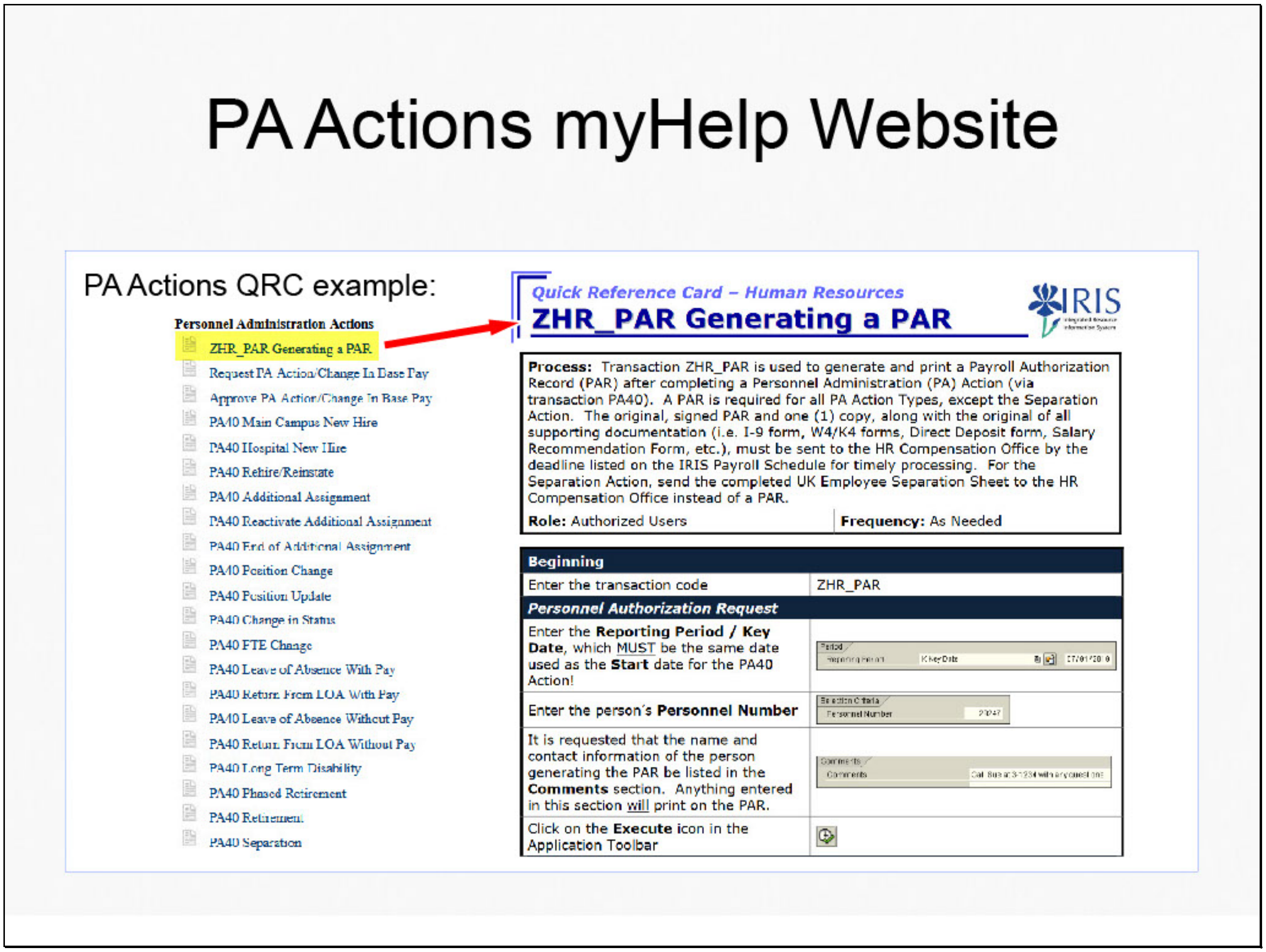

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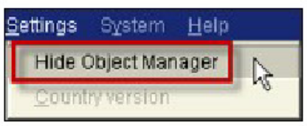
PA Actions Transaction: PA40

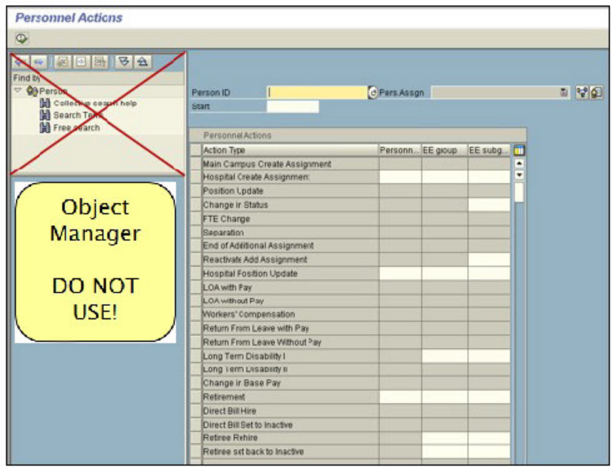
Transaction Code **PA40** is used to process PA Actions.

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.





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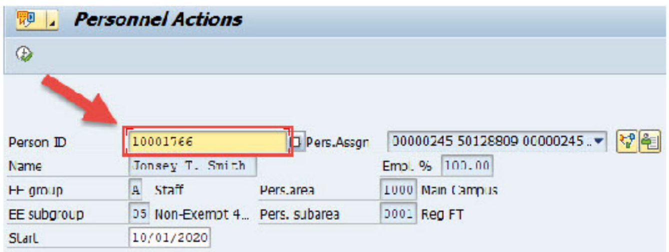
PA40 Tips

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.



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.

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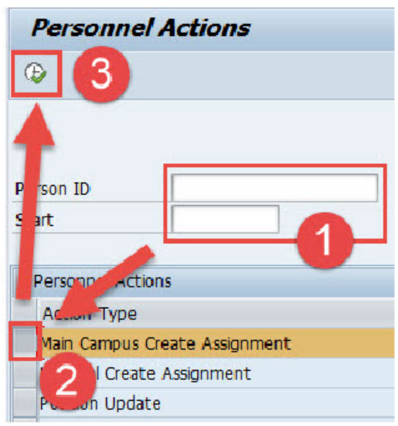
PA40 Initial Screen

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.

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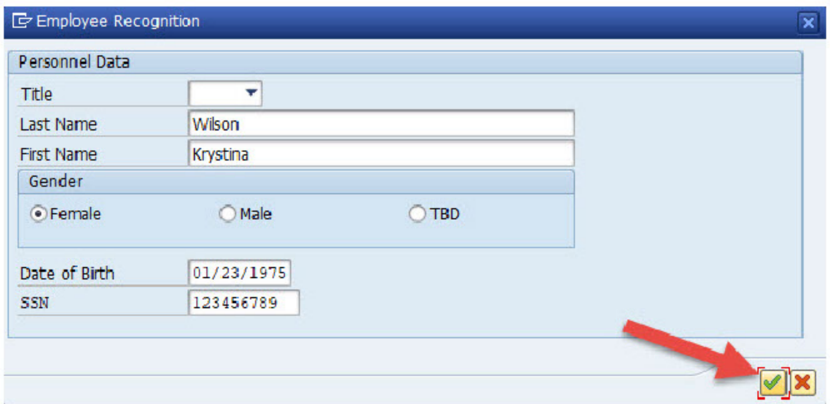
Employee Recognition

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**).

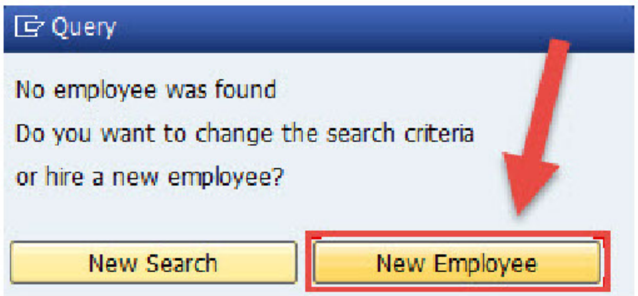


Slide 30 - Query window

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.

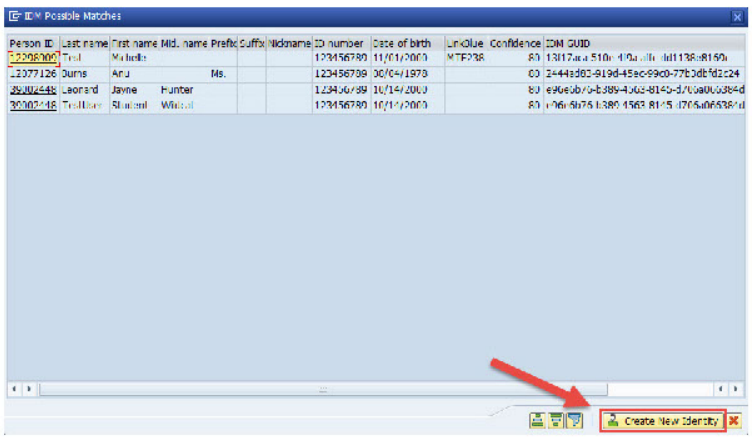


Slide 31 - Slide 31

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.



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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.

IDM Possible Matches

Person ID	Last name	First name	Mid. name	Prefix	Suffix	Nickname	ID number	Date of birth	LinkBlue	Confidence	IDM GUID
12298909	T[illegible]	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

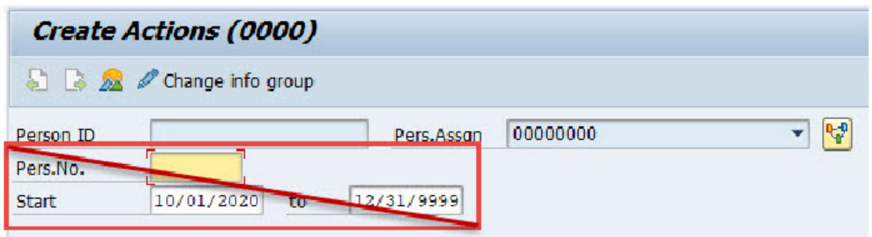
Pers.No.

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.



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).

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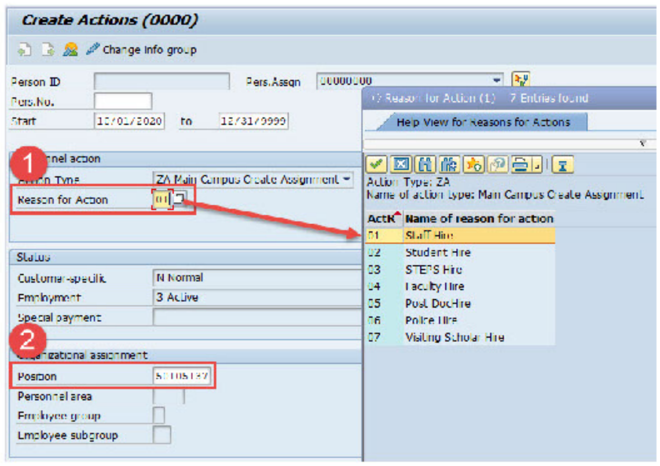
Create Actions (0000)

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**.



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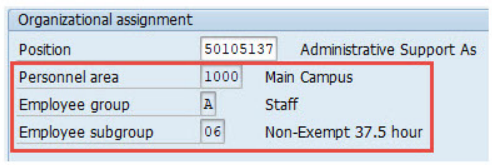
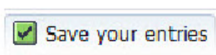
Create Actions (0000) (Continued)

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:



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)

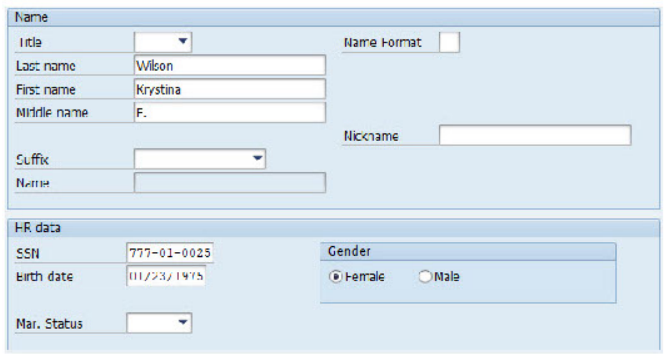
The information entered previously in the Employee Recognition window will already be displayed in the **Create Personal Data (0002)** screen.

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.

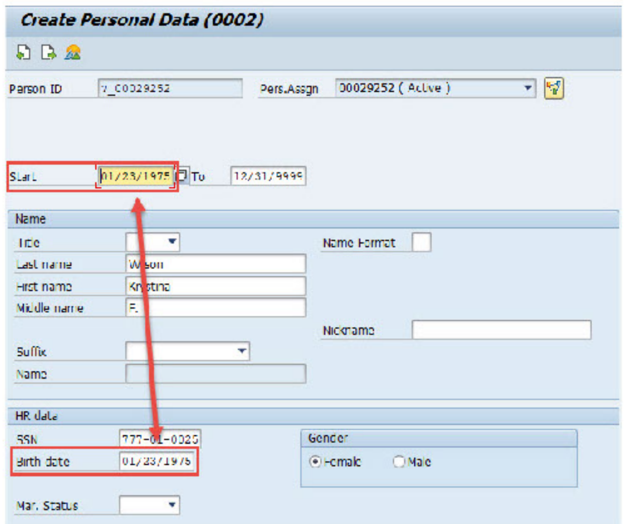


Slide 37 - Slide 37

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.



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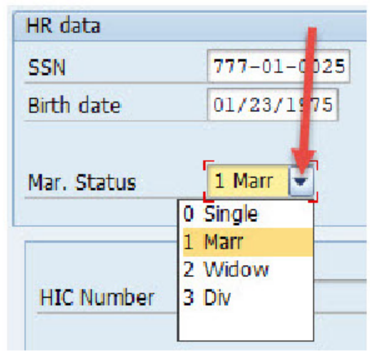
Create Personal Data (0002) (Continued)

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.

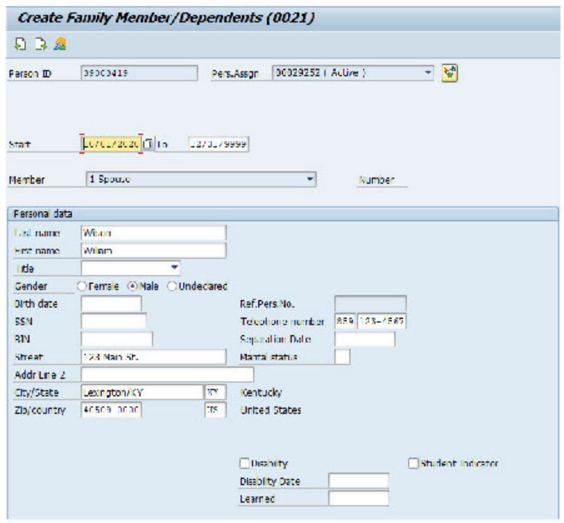
If the spouse information is available, select **Married** from the drop-down menu, press **Enter**, and then click on the **Save** icon to continue to the **Create Family Member/Dependents (0021)** infotype.



Slide 39 - Slide 39

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.

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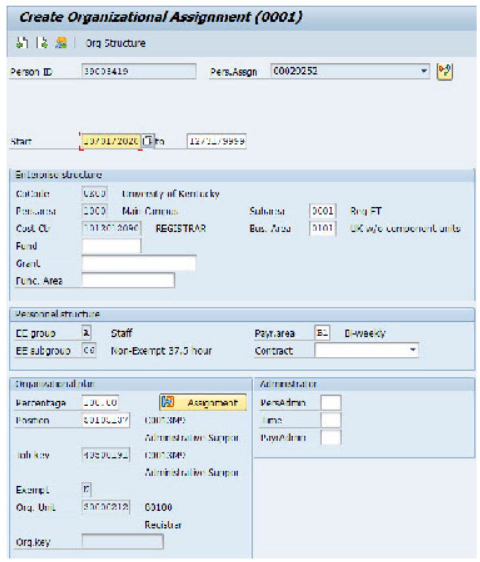
Create Organizational Assignment (0001)

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.



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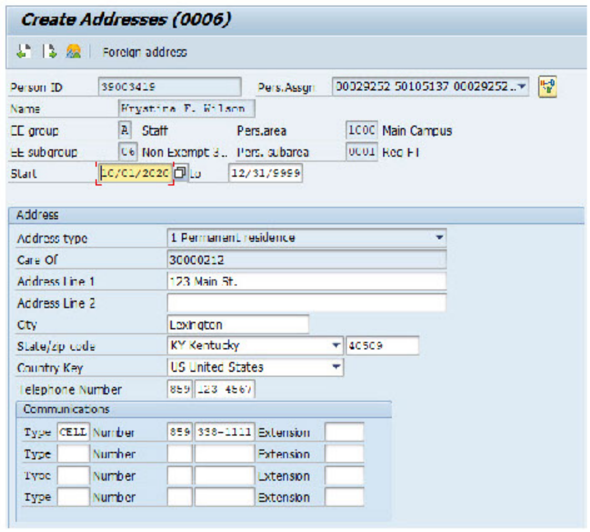
Create Addresses (0006)

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.

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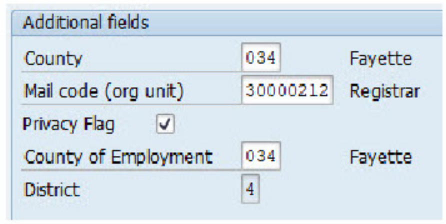
Create Addresses (0006) (Continued)

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.

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.*

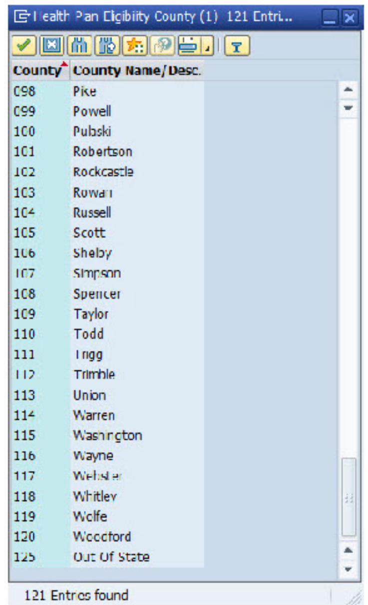
Slide 43 - Slide 43

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, <u>only Kentucky counties will be listed</u>.

Double-click on the desired value to select.

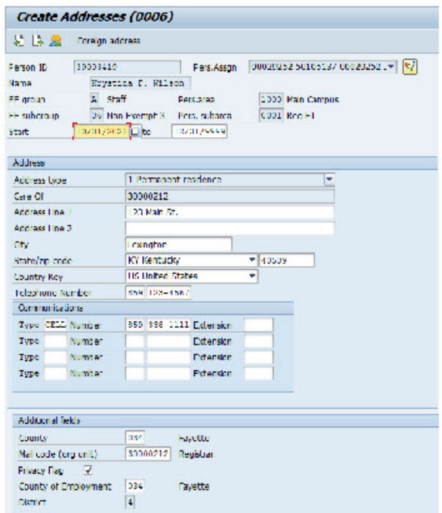


If the employee's address is <u>not</u> in Kentucky, scroll to the very bottom of the list and select the **125 Out Of State** value.

Slide 44 - Slide 44

Create Addresses (0006) (Continued)

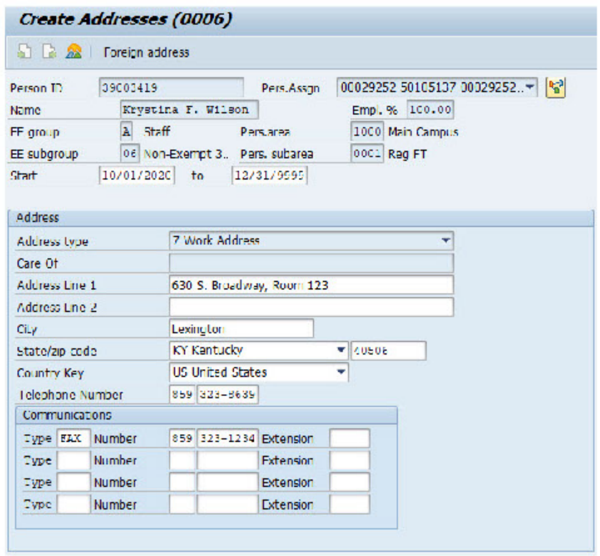
Once all information is entered on the **Create Addresses (0006)** screen, press **Enter**, and then click on the **Save** icon to continue.



Slide 45 - Slide 45

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.

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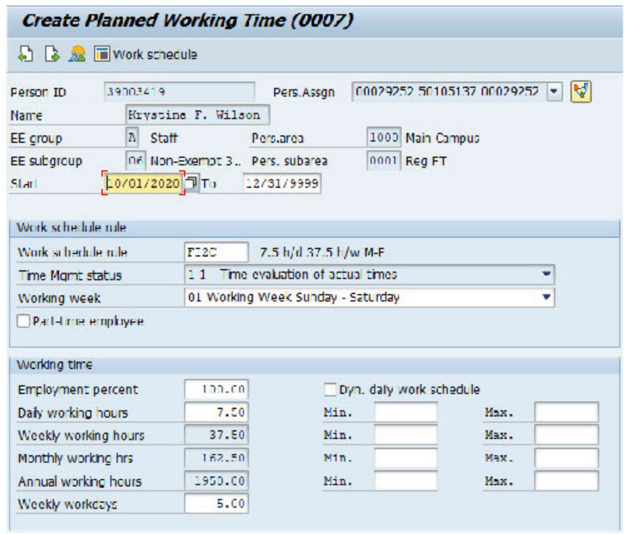
Create Planned Working Time (0007)

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.



Slide 47 - Slide 47

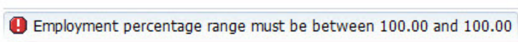
Create Planned Working Time (0007)

(Continued)

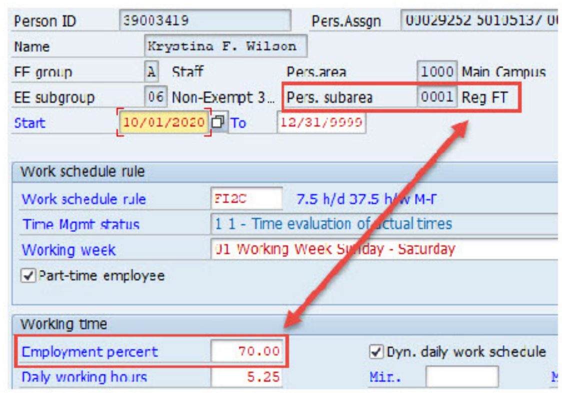
The Employee's **Personnel subarea** must be consistent with the **Employment percent** or an error message will appear.

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**.



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



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

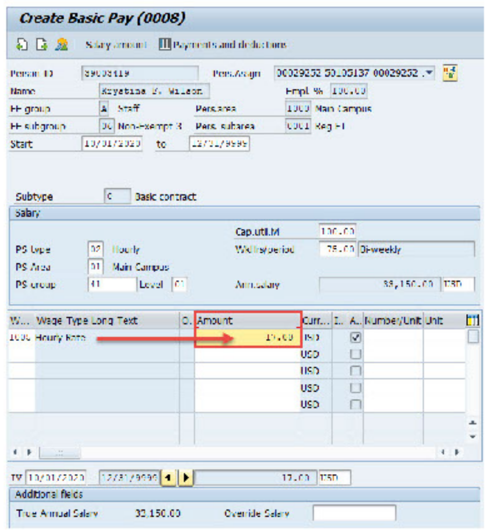
Slide 49 - Slide 49

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.



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

Slide 50 - Slide 50

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.

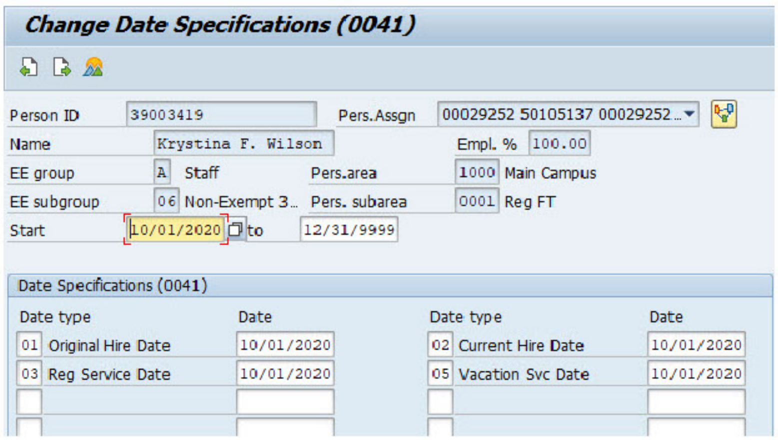
The **Override Salary** field is used in one of two ways:

- 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.

Slide 51 - Slide 51

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.



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

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Create Additional Personal Data (0077)

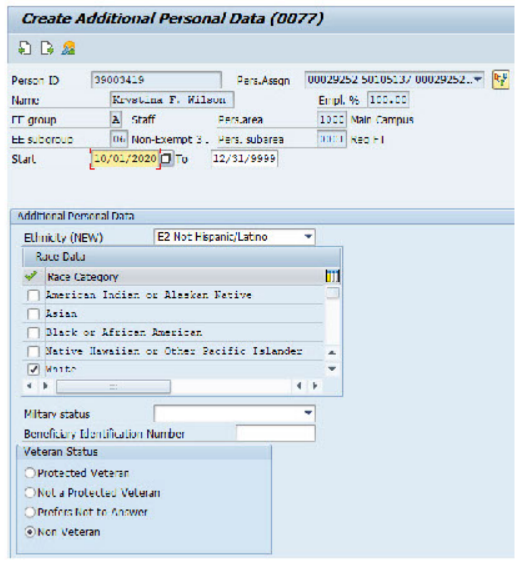
On the **Create Additional Personal Data (0077)** infotype, complete as much information as possible.

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**.

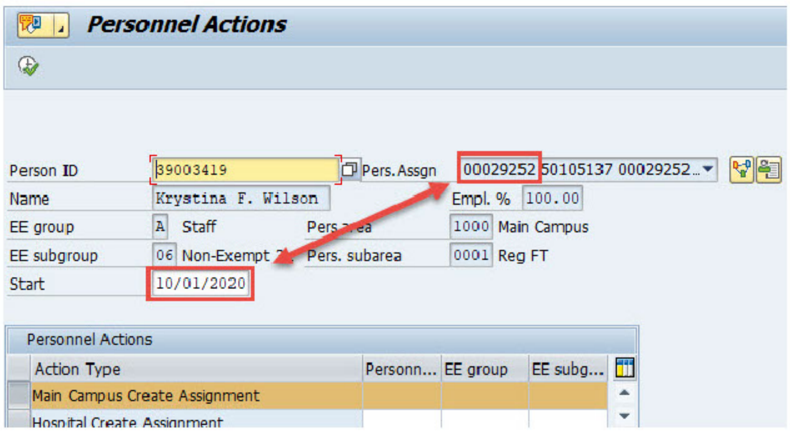


Slide 53 - Slide 53

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.



Slide 54 - Slide 54

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.

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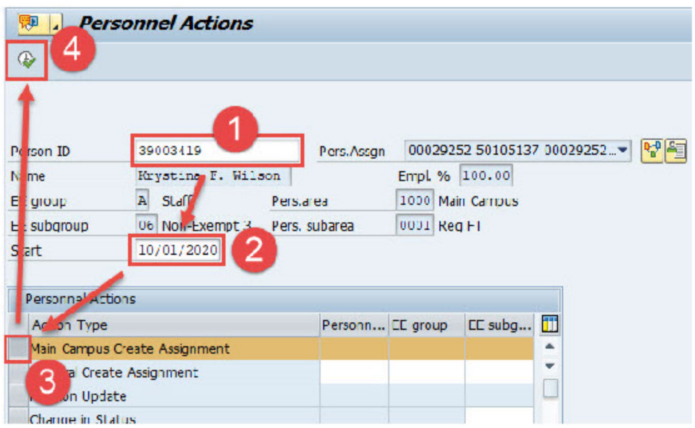
Recovering from an Interruption (Continued)

To recover from an interruption while processing an Action:

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



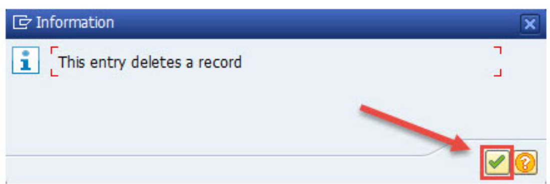
Slide 56 - Slide 56

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!



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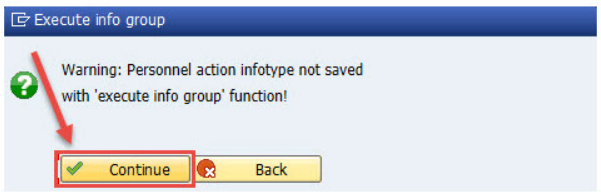
Recovering from an Interruption (Continued)

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.

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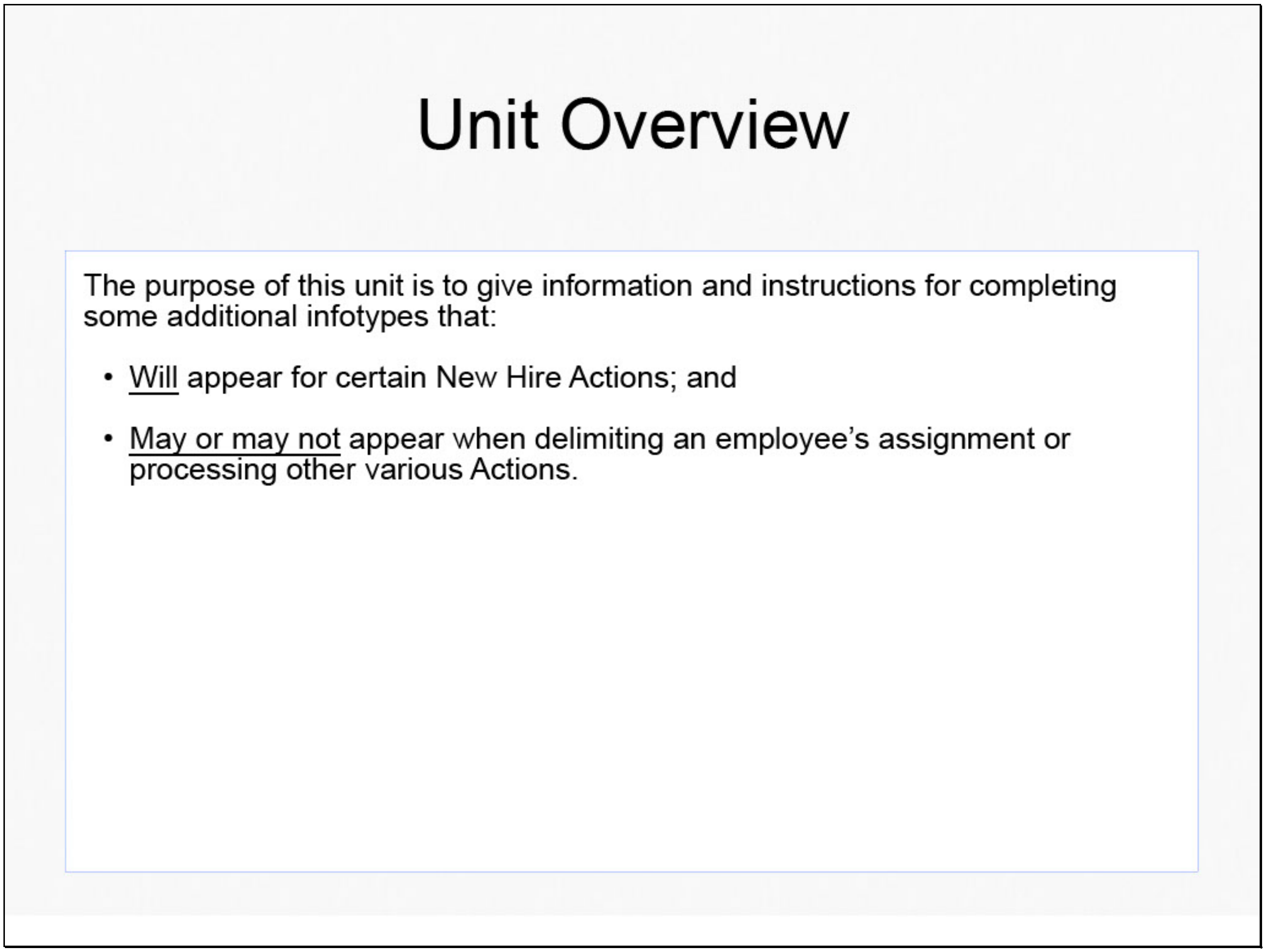
Unit 3 - Additional PA Action Infotypes

Slide 65 - Slide 65

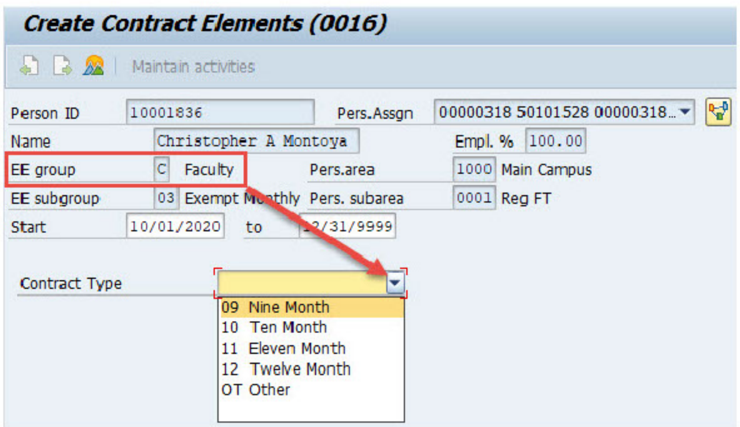


Slide 66 - Slide 66

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.



Slide 67 - Slide 67

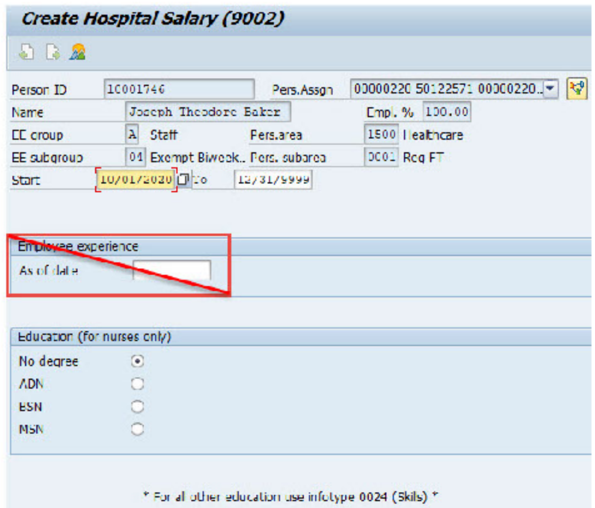
Create Hospital Salary (9002)

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.

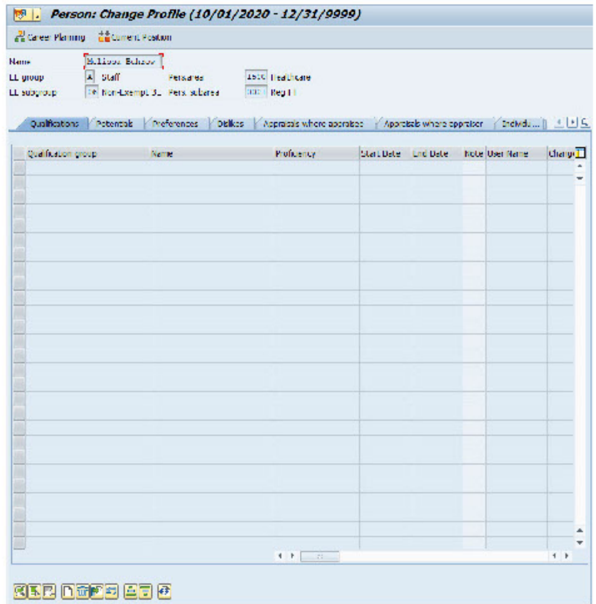


Slide 68 - Slide 68

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.



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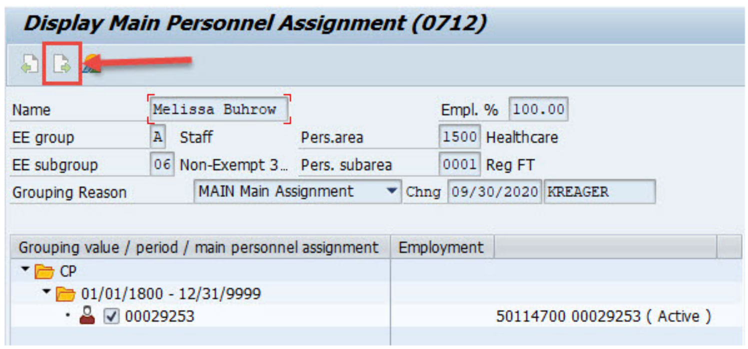
Display Main Personnel Assignment (0712)

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.



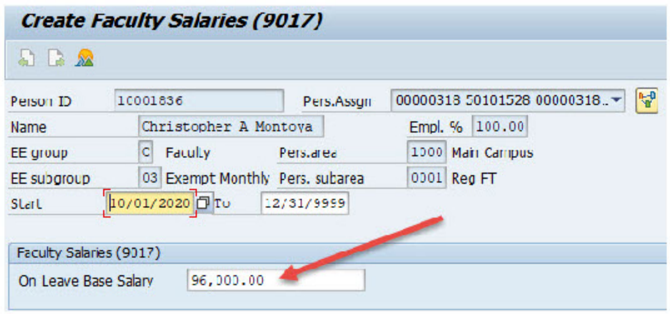
Slide 70 - Slide 70

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.



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

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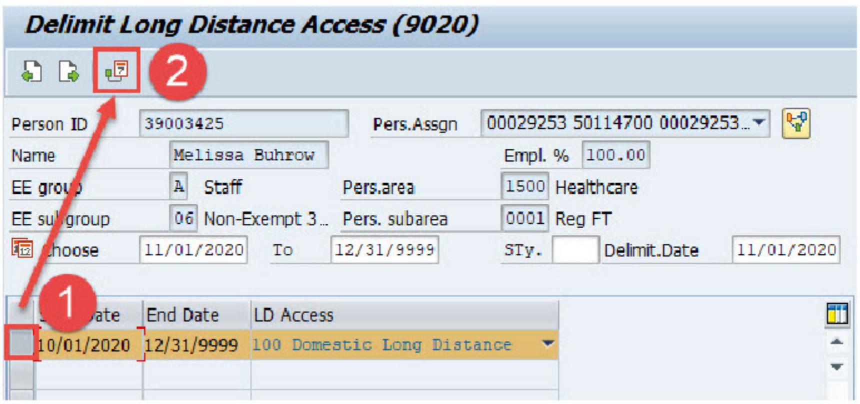
Delimit Long Distance Access (9020)

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).



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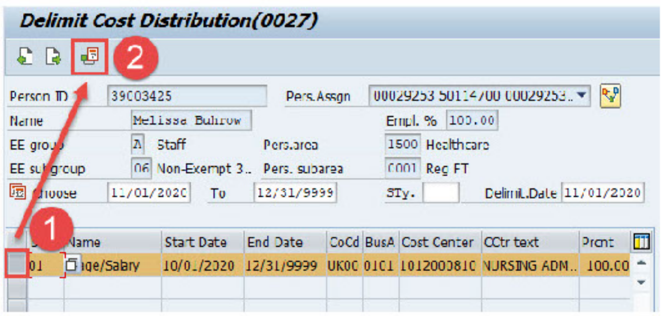
Delimit Cost Distribution (0027)

The **Delimit Cost Distribution (0027)** infotype **<u>may or may not</u>** 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).



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

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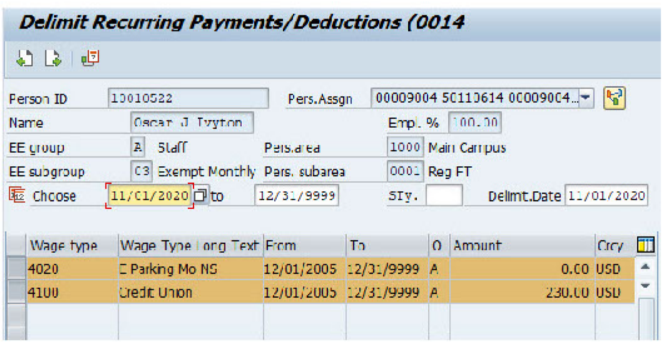
Delimit Recurring Payments/Deducts (0014)

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.)



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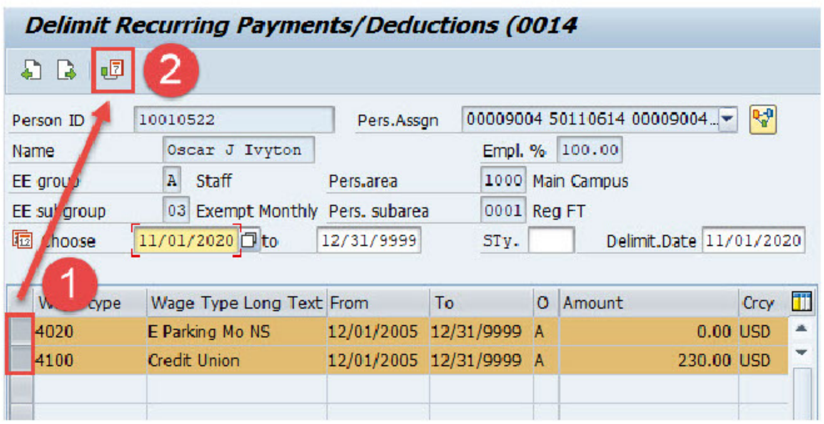
Delimit Recurring Payments/Deducts (0014) (Continued)

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).



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

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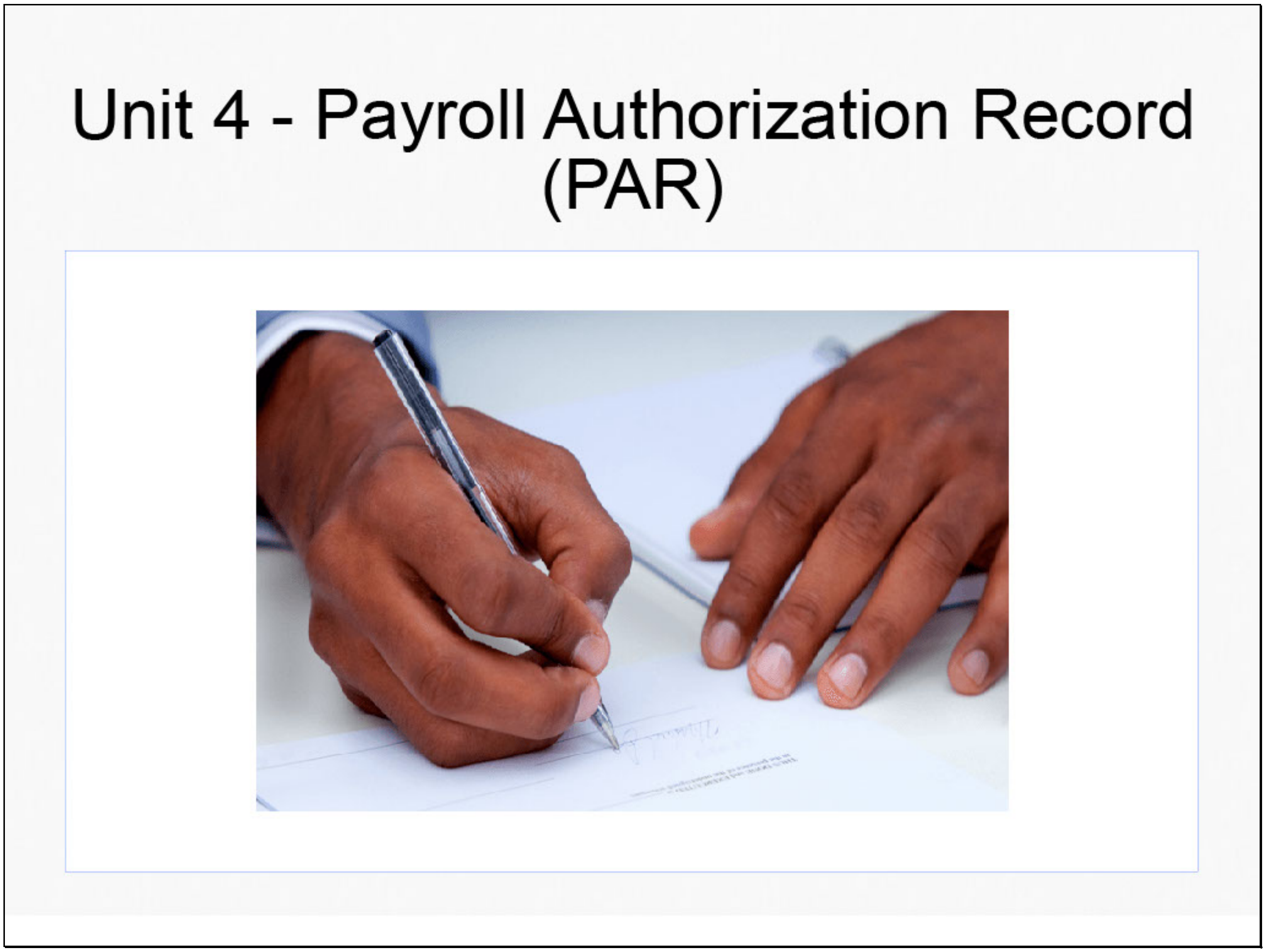

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Payroll Authorization Record (PAR)

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.

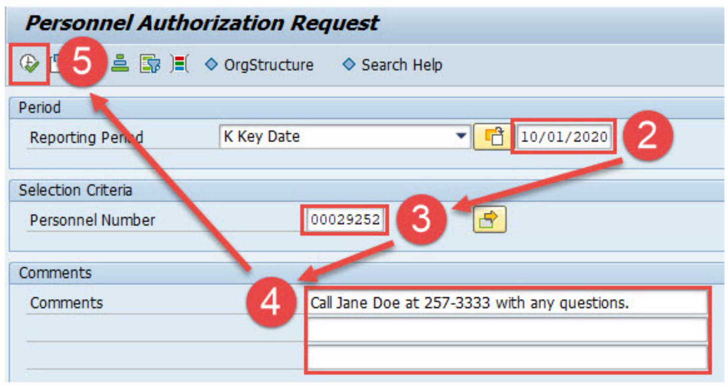
The original, signed PAR and one (1) copy must be sent to HR Compensation.

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



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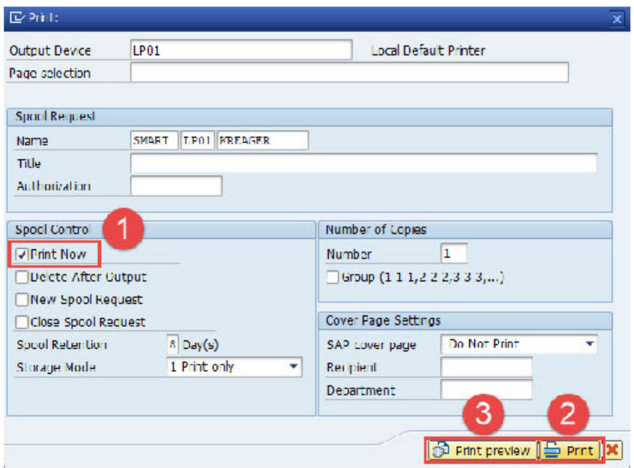
Generating a PAR (Continued)

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).

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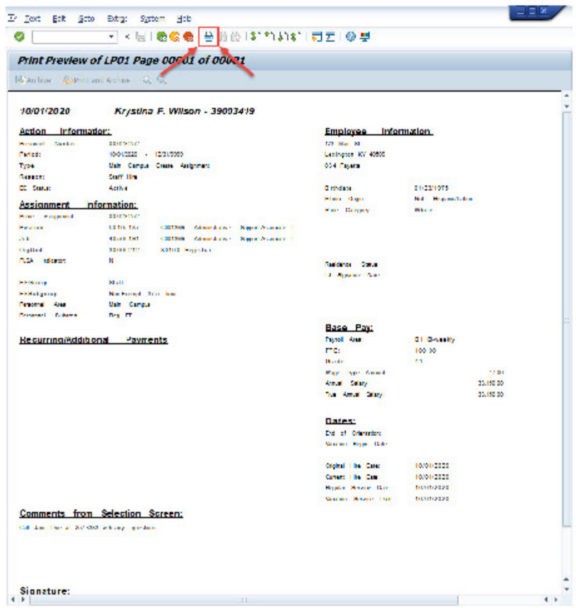
PAR - Print Preview

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.

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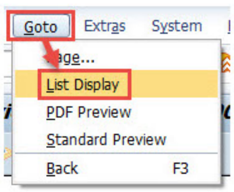
Saving a PAR (Optional)

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.

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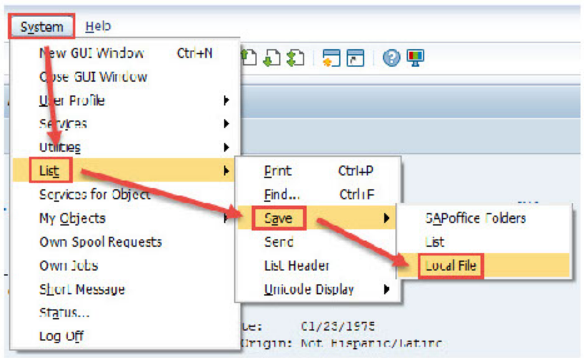
Saving a PAR (Optional) (Continued)

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

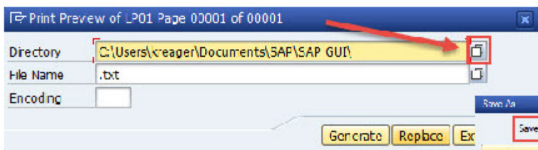


4. Select the **Unconverted** format (system default), then click on the green **Continue** icon

Slide 83 - Slide 83

Saving a PAR (Optional) (Continued)

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

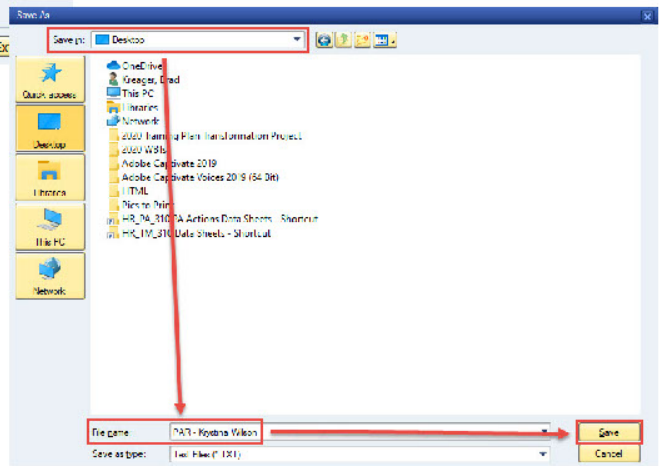


6. Select the desired location in the **Save in** field

7. Enter a **File name**

8. Leave the **Save as type** as **Text Files (*.TXT)**

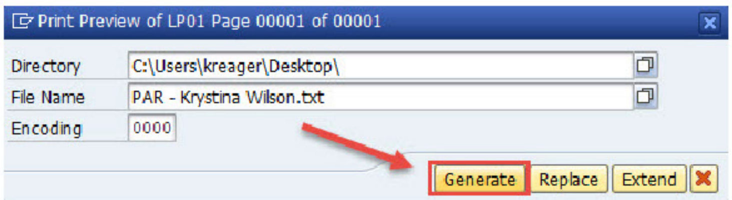
9. Click on the **Save** button



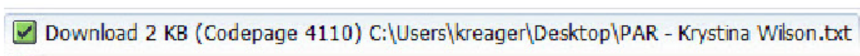
Slide 84 - Slide 84

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.



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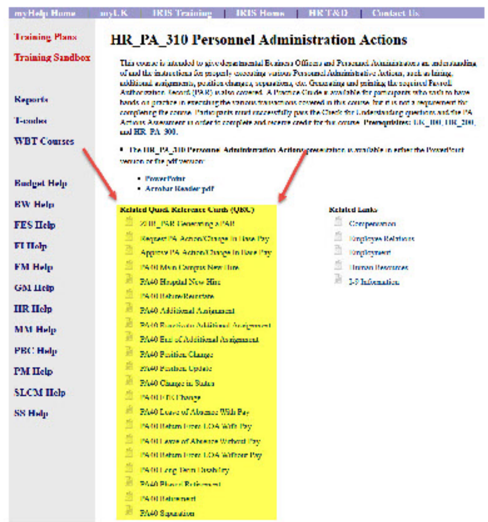
PA Actions myHelp Website

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.



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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.)

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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!

Slide 95 - Slide 95

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