Personnel Administration Actions
HR_PA_310

IRIS
Integrated Resource
Information System

Prerequisites and Roles

IRIS
Integrated Resource
Information Systems

- Prerequisites
  - UK_100 IRIS Awareness & Navigation
  - HR_200 Human Resources Overview
  - HR_PA_300 Personnel Administration

    If you have not completed all of these prerequisite courses, please do so prior to taking this course.

- Roles
  - This course is primarily intended for departmental Business Officers and Personnel Administrators responsible for performing various Personnel Administration (PA) Actions in SAP/IRIS.

Course Content

- Introduction
- Unit 1 – Personnel Administration Actions
- Unit 2 – Additional PA Action Infotypes
- Unit 3 – Payroll Authorization Record (PAR)
- Course Summary

Course Learning Objectives

- Review terms and concepts associated with Personnel Administration (PA) Actions as it relates to the University of Kentucky
- Gain an understanding of and be able to perform a few key PA Actions

  NOTE: This course will **not** cover all of the PA Actions available in the system. The Quick Reference Cards (QRCs) with information and instructions for completing all PA Actions are available on the IRIS myHelp website.

  http://myhelp.uky.edu/rwd/HTML/HR/HR_PA_310.html

Course Completion Requirements

IRIS Integrated Resource Information System

- In order to receive full credit for the PA Actions course, you must successfully complete the following:

  - **Check for Understanding** – This is a series of questions (a quiz) which will be presented at the end of each unit in this course. You must pass a unit's Check for Understanding before proceeding to the next unit.

  - **PA Actions Assessment** – This is a series of practical, hands-on exercises that you will perform in the Training Sandbox. Further information on the assessment will be provided at the end of this course.

IRIS Integrated Resource Information System

Introduction

Key Terminology

• The following are key terms used throughout this course.

Terminology	Definition
Action	A **series of infotypes** that automatically appear in a logical order for data entry to complete an HR process.
Payroll Authorization Record (PAR)	The **paperwork** summarizing the data entered in a PA 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. Also defines the frequency with which an employee is paid. (Monthly or Biweekly)

Key Terminology (Continued)

Terminology	Definition
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'. (Ex: 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'. (Ex: 50128809 – Staff Support Associate II)
Employment Percent	Indicates an employee's FTE (Full Time Equivalency), based on either a 40 or 37.5 hour work week. (Ex: A Regular, Full-time employee working 40 of 40 hours is 100% FTE)

Key Terminology (Continued)

Terminology	Definition
Person ID (PID)	A unique 8-digit number assigned to an employee by IRIS 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 IRIS by the PerNr (pronounced "Per-Ner"). Generally, the same PerNr is retained when employees change assignments, but another PerNr is established for each additional assignment. → This number MAY change.

Person ID & Personnel Number

- If an employee's records were converted to IRIS when the HR module went live (April 1, 2006),
    - the Person ID will begin with a zero (0), and
    - the 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), but it will not be the same as the Person ID.
    - Example: Agnes Witherspoon – Person ID=10025645 and PerNr=10011498

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).

Person ID　　　**Personnel Number (PerNr)**

Person ID	10014547	Pers.Assgn	00013029 50127718 00013029...
Name	Aaron W Trull		Empl. %	20.
EE group	B Students	Pers.area	1000 Main Cam
EE subgroup	09 Student	Pers. subarea	0007 Temp PT
Start	04/25/2006		

Position Number (starts with a '5')

Personnel Administration (PA) Actions

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

- Some example PA Actions:
  - New Hire/Rehire
  - Additional Assignment
  - Transfer
  - Separation

- 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.

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 in the Payroll Authorization Record (PAR) unit later in this course.)*

IRIS Payroll Schedule

- The Payroll Schedule will be helpful in processing Actions. This can be found and printed from Payroll's website:
  - http://www.uky.edu/EVPFA/Controller/payroll.htm

For example: 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.
So, if a Biweekly New Hire Action is processed with a Start (Begin) date of 1/1/2012, then the PARs and documents must be in Compensation by 5:00 PM on 1/11/2012.

IRIS Biweekly Payroll Schedule for Jan - June 2012
Time Load, Time Transfer, and Time Evaluation MUST be run EACH day

Documents MUST be received in Compensation before Wednesday 5:00 PM	Data and Time Input MUST be entered before Thursday 5:00 PM	Corrections and Other Data MUST be entered before Sunday 5:00 PM***	Departments have until 5:00 PM on Monday for the biweekly payrolls	Payroll Period Dates			
	Payroll Run (Prelim)	Payroll Correction Run (Trial)	Payroll Correction Final Run				
Bi-Weekly Date	Bi-Weekly Date	Bi-Weekly Date	Bi-Weekly Date	Begin	End	Date Paid	PR #
12/28/2011	12/29/2011	12/31/11 & 1/1/12	Tuesday 1/3/2012 Noon	12/18	12/31	1/6	1
1/11/2012	1/12/2012	1/15/2012	Tuesday 1/17/2012 Noon	1/1	1/14	1/20	2
1/25/2012	1/26/2012	1/29/2012	1/30/2012	1/15	1/28	2/3	3
2/8/2012	2/9/2012	2/12/2012	2/13/2012	1/29	2/11	2/17	4
2/22/2012	2/23/2012	2/26/2012	2/27/2012	2/12	2/25	3/2	5
3/7/2012	3/8/2012	3/11/2012	3/12/2012	2/26	3/10	3/16	6
3/21/2012	3/22/2012	3/25/2012	3/26/2012	3/11	3/24	3/30	7
4/4/2012	4/5/2012	4/8/2012	4/9/2012	3/25	4/7	4/13	8
4/18/2012	4/19/2012	4/22/2012	4/23/2012	4/8	4/21	4/27	9
5/2/2012	5/3/2012	5/6/2012	5/7/2012	4/22	5/5	5/11	10
5/16/2012	5/17/2012	5/20/2012	5/21/2012	5/6	5/19	5/25	11
5/30/2012	5/31/2012	6/3/2012	6/4/2012	5/20	6/2	6/8	12
6/13/2012	6/14/2012	6/17/2012	6/18/2012	6/3	6/16	6/22	13

IRIS Monthly Payroll Schedule for Jan - June 2012
Time Load, Time Transfer, and Time Evaluation MUST be run EACH day

Documents MUST be received in Compensation before 5:00 PM	Data and Time Input MUST be entered before 5:00 PM	Corrections and Other Data MUST be entered before 5:00 PM	Corrections and Other Data MUST be entered before 5:00 PM	Payroll Period Dates			
	Payroll Run (Prelim)	Payroll Correction Run (Trial)	Payroll Correction Final Run				
Monthly Date	Monthly Date	Monthly Date	Monthly Date	Begin	End	Date Paid	PR #
1/17/2012	1/18/2012	1/19/2012	1/20/2012	1/1	1/31	1/31	1
2/15/2012	2/16/2012	2/17/2012	2/20/2012	2/1	2/29	2/29	2
3/14/2012	3/15/2012	3/16/2012	3/19/2012	3/1	3/31	3/30	3
4/11/2012	4/12/2012	4/13/2012	4/16/2012	4/1	4/30	4/30	4
5/21/2012	5/22/2012	5/23/2012	5/24/2012	5/1	5/31	5/31	5
6/18/2012	6/19/2012	6/20/2012	6/21/2012	6/1	6/30	6/29	6

Validity Dates

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

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

  - 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".

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

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.

  - The system will automatically change the **To** date on the delimited record to the **day before** the **Start** date of the new record.

Security in IRIS-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 also may 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 IRIS if you are hiring, such as for a transfer or an additional assignment.

Introduction
Check for Understanding

IRIS
Integrated Resource
Information System

Personnel Administration Actions

UK UNIVERSITY OF KENTUCKY   Personnel Administration Actions   19

PA Actions Overview

IRIS
Integrated Resource
Information System

- Personnel Administration 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.

UK UNIVERSITY OF KENTUCKY   Personnel Administration Actions   20

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 IRIS myHelp website.

IRIS myHelp Website for PA Actions

- Click on any of the links to open the corresponding QRC. For example:

Personnel Administration Actions

- ZHR_PAR Generating a PAR
- PA40 New Hire - Main Campus
- PA40 New Hire - Hospital
- PA40 Main Campus Rehire/Reinstate
- PA40 Leave of Absence With Pay
- PA40 Leave of Absence Without Pay
- PA40 Return From LOA With Pay
- PA40 Return From LOA Without Pay
- PA40 Main Campus Additional Assignment
- PA40 Demotion
- PA40 Department Transfer
- PA40 FTE Change
- PA40 Lateral Transfer
- PA40 Pay Change
- PA40 Position Update
- PA40 Promotion
- PA40 Reduce Hours
- PA40 Re-Evaluation
- PA40 Retirement
- PA40 Separation

Quick Reference Card – Human Resources
ZHR_PAR Generating a PAR

Process: Use ZHR_PAR to generate a Payroll Authorization Record (PAR) after completing a PA40 Action. A PAR is required for all action types except the Separation action (use the UK Employee Separation Sheet instead). A PAR must be printed and signed by the appropriate authorized personnel. Then, two copies of the PAR (one having the original signature), along with all supporting documentation, must be sent to the HR Compensation Office by the deadline listed on the IRIS Payroll Schedules for timely processing.

Role: Authorized Users	Frequency: As Needed

Beginning

Enter the transaction code	ZHR_PAR

Program ZHR_NEWPAR Screen

| Enter the **Reporting Period / Key Date**, which MUST be the same date used as the **Start** date for the PA40 Action!	
Enter the person's **Personnel Number**	
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.	
Click on the **Execute** icon in the Application Toolbar	

PA Actions Transaction – PA40

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

- The Object Manager portion of the screen is typically used for system searches. Even though you will be searching the system for people during various Actions, <u>do not use</u> the Object Manager.

  Object Manager

  DO NOT USE!
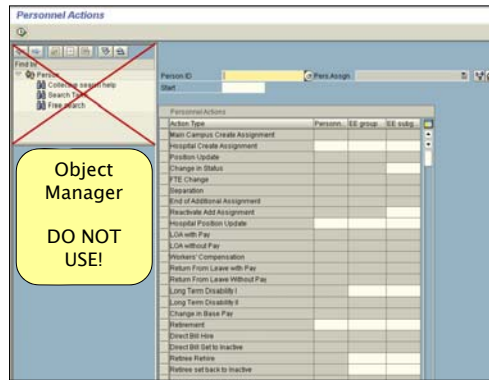
- To hide the Object Manager, Select **Settings → Hide Object Manager** in the Menu Bar.

  Settings   System   Help
  Hide Object Manager
  Country version
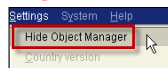
PA40 Tips

- 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 the Enter key** to clear this information.

Person ID	10014547	Pers.Assgn 00013029 50127718 00013029…
Name	Aaron W Trull	Empl. % 100.00
EE group	B Students	Pers.area 1000 Main Campus
EE subgroup	09 Student	Pers. subarea 0007 Temp PT >.20
Start	04/25/2006	

- Do <u>not</u> 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 once a PA Action is <u>completed</u>.

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

PA40 Initial Screen

1. As for completing the **Person ID** and **Start** fields, refer to the instructions on the appropriate QRC on the IRIS myHelp-HR Help website.

   Tip: Do <u>not</u> enter a **Person ID** when executing the **Main Campus Create Assignment** or **Hospital Create Assignment Action Type** for any of the following:
   - New Hire/Rehire/Reinstate
   - Position Change (Promotion, Transfer, etc.)
   - Additional/Overload Assignment

2. Click on the gray selection box next to the appropriate **Action Type**.

3. Click on the **Execute** icon.

Employee Recognition Window

- Whenever the **Person ID** field is left blank, the **Employee Recognition** window will appear.
- Enter the employee's **Last**/**First Name**, then click on the **Continue** icon.

- If the employee is not found, the **Query** window will appear. Click on the **New Employee** button, and the system will guide you through the New Hire Action.

Employee Recognition Window (Continued)

- If the employee is found and is in an "**Active**" status, double-click on their name to select.
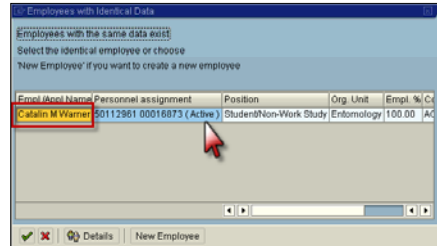
- Then you will choose the appropriate option on the **New Work Relationship** window and click on the green **Continue** icon.
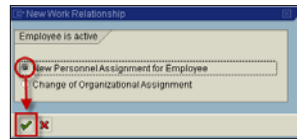
Employee Recognition Window (Continued)

- If the employee is found and is in a "**Withdrawn**" status, double-click on their name to select.
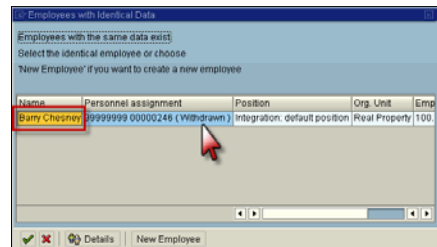
- Then you will choose the appropriate option on the **New Work Relationship** window and click on the green **Continue** icon.
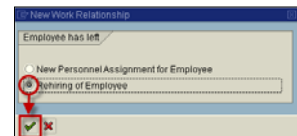
Actions (0000)

🔸 Although the cursor defaults in the **Pers No.** field, <u>do not</u> <u>ever</u> enter a value. The system will automatically populate the Personnel Number.

Create Actions (0000)

Person ID   Pers.Assgn   00000000
Pers.No.
Start   11/01/2010   to   12/31/9999

🔸 Also, once you are into a PA Action's infotypes, <u>do not</u> <u>ever</u> 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).

Actions (0000) (Continued)

- Always select the appropriate **Reason for Action**.
  - ◆ Click on the **Possible Entries** icon to display the list of available reasons, then double-click to select.
- Enter/verify the **Position** number, then press **Enter**.

Person ID   Pers.Assgn   00000000
Pers.No.
Start   11/01/2010   to   12/31/9999

Personnel action
Action Type   ZA Main Campus Create Assignm...

Reason for Action   01

Ac...	Name of reason for acti...
01	Staff Hire
02	Student Hire
03	STEPS Hire
04	Faculty Hire
05	Post DocHire
06	Police Hire

Status
Customer-specific   N Normal
Employment   3 Active
Special payment

Organizational assignment
Position   50105020
Personnel area
Employee group
Employee subgroup

Actions (0000) (Continued)

- If a **Position** number is entered, the following dialog box will appear:

  Information
  Default values are used by the position
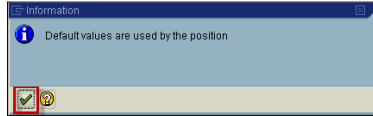
  - Click on the green **Continue** icon or press **Enter**. This will automatically populate several fields on some of the infotypes with default attributes from the position's master data (transaction PP01). For example:

    Organizational assignment

Position	50105020	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.

Personal Data (0002)

- Enter the employee's **Name**, **SSN**, **Birth date**; select the appropriate **Gender**; and press **Enter**.

  Ensure the Name information is entered exactly as it is seen on the employee's Social Security card.

  - Use proper capitalization and double-check spelling.
  - The **Suffix** field is used to indicate Jr., Sr., I, II, etc. Do **not** enter this in the **Last name** field.

Start	09/29/1970 To 12/31/9999

  Name
Title	
Last name	Wilson
First name	Krystina
Middle name	F.
Suffix	

  HR data
SSN	777010010
Birth date	09/29/1970
Gender	● Female ○ Male
Mar. Status	

  Note: Upon pressing **Enter**, the **Start** date will temporarily change to the employee's **Birth date**. **DO NOT CHANGE IT!** It will return to the original **Start** date of the PA Action on the next infotype.

Personnel Data (0002) (Continued)

- (Optional) Specify the employee's **Marital (Mar.) Status**.
  - If you choose "**Married**", the system will display the Family Member/Dependents (0021) infotype. *(See next slide for more on this infotype.)*

HR data		
SSN	777010010	Gender
Birth date	09/29/1970	● Female ○ Male
Mar. Status	1 Marr	

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

Family Member/Dependents (0021)

- Enter the **Spouse** information (if known).
  - The **Last name** will default to the same as the employee, but may be changed if necessary.

- Click on the **Save** icon to complete this infotype and continue.

- Note: If this information is __not__ known, click on the **Next Record** icon in the Application Toolbar to skip this infotype and move on to the next infotype.

Create Family Member/Dependents (0021)

List of Students Matching Employee Data

- This window will appear immediately after saving the Personal Data (0002) infotype. The system is checking the SLCM module of IRIS to see if there is an existing student with identical personal data.
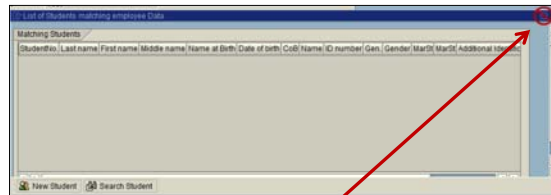
DO NOT CLOSE THIS WINDOW by clicking on the X in the upper-right corner! Doing so will assign the employee an invalid Person ID (i.e. ?_11046666).

- If this happens, contact HR Compensation to have the Action deleted, then process the entire Action again.

List of Students Window (Continued)

- If any **Matching Students** are found and your employee is listed, double-click on their Student ID (**StudentNo.**) and the system will assign that as their Person ID in the HR module.

- If any **Matching Students** are found but your employee is **not** listed, do one of the following:
  - Click on the **New Student** button if you are confident there is no student record in the SLCM module
  - Click on the **Search Student** button if you know there should be a student record, change the search criteria, and click on the **Find** icon.
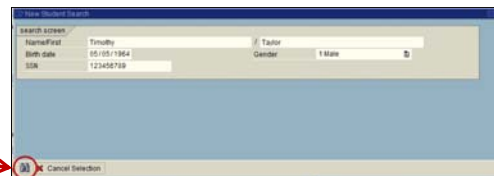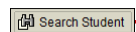
List of Students Window (Continued)

- If no **Matching Students** are found, you will still get this window.
    - Click on **New Student** if you're confident the employee is **not** already a student in SLCM; or
    - Click on **Search Student** if you know there should be a student record listed, change the search criteria, and click on the **Find** icon.

Organizational Assignment (0001)

- Simply press **Enter** on this infotype.
    - The system will populate the fields with the default values based on the **Position** number.
    - Do **not** change the **Percentage** value.

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

Addresses (0006) – Permanent Residence

- Enter the **Permanent residence**, **County** of residence, and any other known information, and press **Enter**.
- The **Mail code (org unit)** indicates where the employee's pay stub will be directed to.
- The **Privacy Flag**, if checked, prevents the address from being published in the University directory.
- The **County of Employment** is used primarily by the College of Agriculture, but can be used by others if desired.
- Click on the **Save** icon to complete this infotype and continue.

Enter the **City** only

Addresses (0006) – Work Address

- Enter the employee's **Work Address** information, if known.
  - Use the **Next Record** icon to skip, if unknown.

- Click on the **Save** icon to complete this infotype and continue.

- Note: The employee can maintain this address through the myUK Employee Self-Service tab, but this will create a starting record.

Planned Working Time (0007)

- Press **Enter** to populate the values in this infotype.

- Verify the data *(see the next slide for more information)*.
- Check the Status Bar for any system messages. Once it reads "**Save your entries**", click on the **Save** icon to complete this infotype and continue.

Planned Working Time (0007) (Continued)

- The Employee's **Personnel Subarea** <u>must</u> 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 stated in the error message. *(See next slide for chart.)*

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

Basic Pay (0008)

- Enter the **Amount** (Hourly Pay Rate, Monthly Salary, Biweekly Salary, etc.).

- Press the **Enter** key to populate the **Annual Salary** field.

- Click on the **Save** icon to complete this infotype and continue.

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.

- 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.

Date Specifications (0041)

- Verify that the information on this infotype is correct and click on the **Save** icon to continue

Change Date Specifications (0041)

Person ID	10038414		Pers.Assgn	00029247 50105020 00029247 ...
Name	Krystina F. Wilson			Empl. % 100.00
EE group	A Staff	Pers.area		1000 Main Campus
EE subgroup	06 Non-Exempt 37 ...	Pers. subarea		0001 Reg FT
Start	11/01/2010 to	12/31/9999		

Date Specifications (0041)

Date type	Date	Date type	Date
01 Original Hire Date	11/01/2010	02 Current Hire Date	11/01/2010
03 Reg Service Date	11/01/2010	05 Vacation Svc Date	11/01/2010
07 Separation Date	12/31/9999		

- If the information is incorrect, contact HR Compensation. Do **not** change it yourself please!

Additional Person Data (0077)

- Select the employee's **Ethnicity**, and then click in the checkbox next to the appropriate **Race Category**.
  - If the "Hispanic/Latino" **Ethnicity** is selected, a **Race Category** is <u>not</u> required.
  - If the "Not Hispanic/Latino" **Ethnicity** is selected, a **Race Category** <u>must also be selected</u>.
  - Multiple race categories may be selected as appropriate.
- Complete the **Military** and **Veteran Status** sections, if known.
- Click on the **Save** icon to complete this infotype and continue.

Additional Person Data (0077) (Continued)

- If the **Veteran Status** section is not completed, the following message will appear. Click on the **Continue** icon to accept and continue.
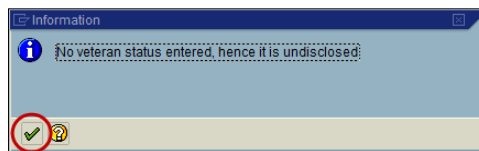
Note: This infotype is required and must be completed. If the record is missing or incomplete, the employee's record will <u>not</u> be unlocked for payroll processing until it has been completed!

Completed PA Action

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

Person ID	10038414		Pers.Assgn	00029247 50105020	00029247..	
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	11/01/2010					

Personnel Actions

Action Type	Personn...	EE group	EE subg...	
Main Campus Create Assignment				
Hospital Create Assignment				
Position Update				
Change In Status				

- 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.

Recovering from an Interruption

- Should you ever be returned to the initial PA40, **Personnel Actions** screen prior to completing a PA 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.

Recovering from an Interruption (Continued)

- To recover from an interruption while processing a PA Action in **PA40**:
    1. Enter the employee's **Person ID**.
    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.

Recovering from an Interruption (Continued)

- The **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 **Continue** icon. Nothing will be deleted!

Recovering from an Interruption (Continued)

6. Click on the **Continue** button on the **Execute info group** window.
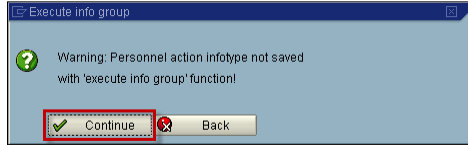
- The **Change Personal Data (0002)** infotype will appear.

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!

8. Complete the remaining infotypes as originally instructed until the PA Action is completed.

Unit 1
Check for Understanding

Unit 2

Additional PA Action Infotypes

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.

Contract Elements (0016) – Faculty Only

- This infotype <u>will</u> appear only for Faculty when processing the New Hire Action.
- Select the appropriate **Contract Type**, then click on the **Save** icon to complete this infotype and continue.

Hospital Salary (9002) – Hospital Hire Only

- This infotype <u>will</u> appear for Hospital New Hires only.
- Leave the **As of date** field in the **Employee experience** section <u>blank</u>. UKHC Payroll will fill in after the assignment has been completed.

- Select the appropriate **Education** degree for nurses only, then click on the **Save** icon to complete this infotype and continue.
- Contact UKHC Payroll with any questions.

Person: Change Profile – Hospital Hire Only

- This screen <u>will</u> also appear for Hospital New Hires only.
- Just click on the **Back** icon in the Standard Toolbar to continue.
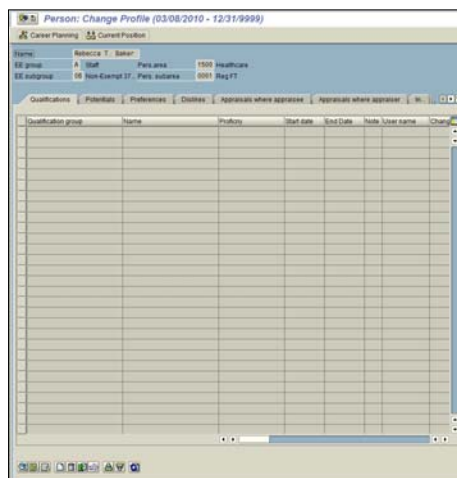
Main Personnel Assignment (0712)

- This infotype is used for anyone with concurrent employment (additional/overload assignments).

- It is presented as display only for end users.

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

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

Faculty Salaries (9017) – LOA with Pay

- This infotype <u>will</u> 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, then click on the **Save** icon.

Faculty Salaries (9017)	
On Leave Base Salary	96,000.00

- 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.

Delimit Long Distance Access (9020)
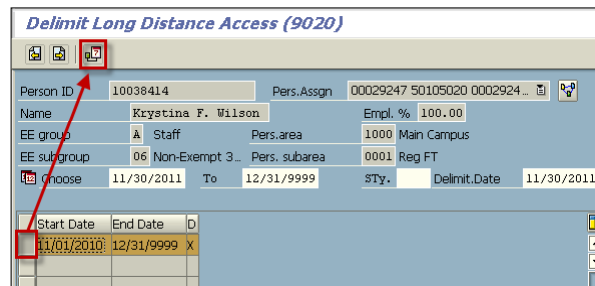
- This infotype is dynamically created during the New Hire Action for <u>regular employees only</u> (no STEPS, no students, and no temps) and is used to track long distance access.

Display Long Distance Access (9020)

Person ID	10038414 Pers.Assgn 00029247 50105020 0002924...
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	11/01/2010 To 12/31/9999 Chngd 11/21/2011 KREAGER

Long Distance Access (9020)
☑ Domestic

- Business Officers will be responsible for removing (delimiting) this access if it is not needed or wanted for the individual employee (using PA30).
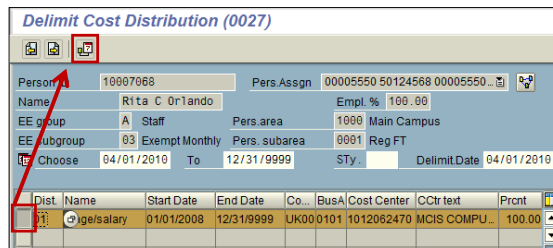
Delimit Long Distance Access (9020) (Continued)

- The **Delimit Long Distance Access (9020)** infotype will be presented during the Separation Action and must be delimited.
- To delimit the infotype:
    1. Click on the gray selection box to select the record
    2. Click on the **Delimit** icon in the Application Toolbar

Cost Distribution (0027)

- This 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:
    1. Click on the gray selection box next to <u>all</u> lines to be delimited <u>first</u>
    2. <u>Then</u> click on the **Delimit** icon

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

Recurring Payments/Deducts (0014)

- This infotype <u>may or may not</u> 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 <u>all</u> wage type items when processing a Separation Action!

To delimit, if applicable:
1. Click on the gray selection box next to <u>all</u> lines to be delimited <u>first</u>;
2. <u>Then</u> click on the **Delimit** icon.

Delimit Recurring Payments/Deducts (0014)

Person ID	10009511	Pers.Assgn	00007993 50121038 00007993...
Name	Sophia R Rogers	Empl. %	100.00
EE group	A Staff	Pers.area	1000 Main Campus
EE subgroup	93 Exempt Monthly	Pers. subarea	0001 Reg FT
Choose	04/01/2010 to 12/31/9999	STy	Delimit.Date 04/01/2010

Wage type	Wage Type Long Text	From	To	O	Amount	Crcy
2130	rit Incentive	01/01/2008	12/31/9999		500.00	USD
4025	E Parking Mo Shell	12/01/2005	12/31/9999	A	0.00	USD
4100	Credit Union	12/01/2005	12/31/9999	A	678.00	USD
4230	United Way	11/30/2005	12/31/9999	A	10.00	USD

Unit 3

Payroll Authorization Record (PAR)

Payroll Authorization Record (PAR)

- A 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, send the completed Separation Form to HR Compensation. The form is located at:

    - http://www.uky.edu/HR/employ/documents/sepsheet.pdf

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

- Also, the original of all appropriate, supporting documentation (i.e. I-9 form, W4/K4 forms, Direct Deposit form, Salary Recommendation Form, etc.) must be attached to the original, signed PAR. The second PAR is sent by itself.

Generating a PAR

1. Enter the transaction code **ZHR_PAR**.

2. Enter the **Key Date**, which <u>must</u> be the same as the **Start** date entered in PA40.

3. Enter the employee's **Personnel Number**.

4. Enter your contact information and any other **Comments** as needed. (Comments <u>do</u> print on the PAR!)

5. Click the **Execute** icon.

Personnel Authorization Request

Period
Reporting Period   K Key Date   11/01/2010

Selection Criteria
Personnel Number   29247

Comments
Comments   Call Jane Doe at 257-3333 with any questions.

Generating a PAR (Continued)

- To print the PAR from this dialog box:
  1. Click in the checkbox next to **Print immediately**
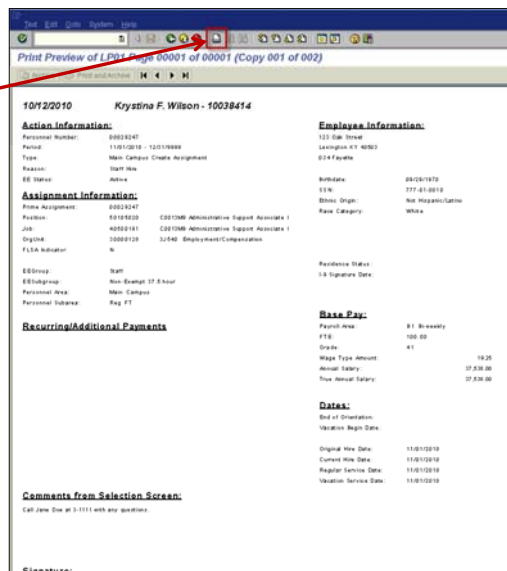 2. Select the **Number of Copies**
  3. Click on the **Print** icon
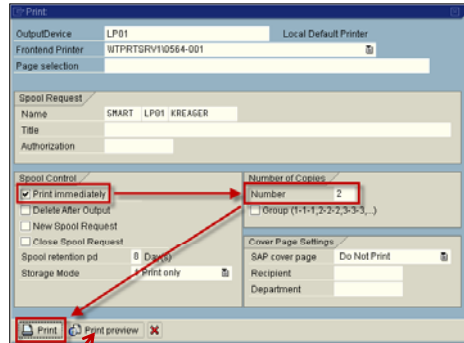
- Click on the **Print preview** button to review the PAR prior to printing.

PAR – Print Preview

- After previewing the PAR for accuracy, click on the **Print** icon to print.

- You will receive a similar message in the Status Bar:
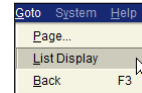
  Spool request (number 1,060) created.

Saving a PAR (Optional)

- Although you can <u>always</u> view/print a PAR at any time using the ZHR_PAR transaction, you can save it to your computer if desired as follows:
    1. Use the **ZHR_PAR** transaction and do a **Print preview**.
    2. Select **Goto** → **List Display** from the Menu Bar.

The PAR will change to a different format. Do not print and send this format of the PAR to HR Compensation!
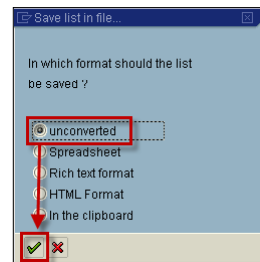

Saving a PAR (Optional) (Continued)

3. Select **System** → **List** → **Save** → **Local File** from the Menu Bar.
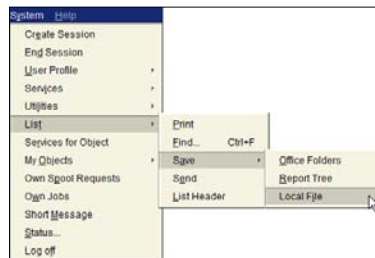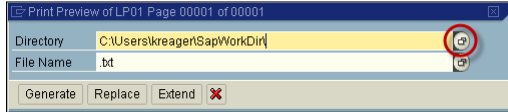
4. Select the **unconverted** format (system default), then click on the **Continue** icon.
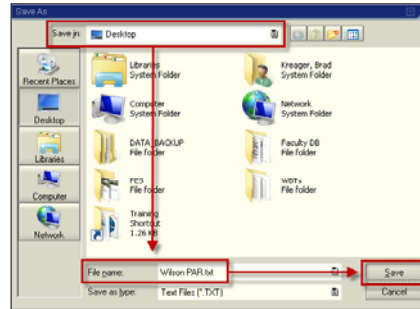
Saving a PAR (Optional) (Continued)

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

6. Select the desired location in the **Save in** field.
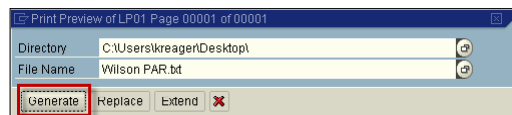
7. Enter a **File name**.
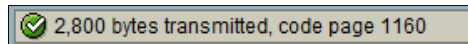
8. Click on the **Save** button.

Saving a PAR (Optional) (Continued)

9. Click on the **Generate** button.

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

2,800 bytes transmitted, code page 1160

Unit 3
Check for Understanding

Course Summary

- Departmental Business Officers and Personnel Administrators are responsible for processing PA Actions in SAP/IRIS.

- Transaction PA40 is used for processing PA Actions.

- Transaction ZHR_PAR is used to generate the Payroll Authorization Record (PAR).

PA Actions Help Websites

- IRIS myHelp–HR & Payroll Help website:
  - http://myHelp.uky.edu/rwd/HTML/HR.html
  - Contains Quick Reference Cards, printable course manuals, HR/Payroll Frequently Asked Questions, and the HR/Payroll Reference Manual

- IRIS–HR website:
  - http://www.uky.edu/IRIS/HR/
  - Contains HR/Payroll Reference Manual, Forms, and other references

---

PA Actions Practice Guide & Assessment

- The **PA Actions Practice Guide** and **PA Actions Assessment** contain a series of hands-on exercises that you perform in the Training Sandbox which will reinforce the key learning objectives covered in this course.

- The practice guide 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 PA Actions and the PAR transaction prior to completing the **PA Actions Assessment**.

- The **PA Actions Assessment** is the "test version" of the practice guide. You must complete the assessment in order to receive credit for the PA Actions course!

PA Actions Practice Guide & Assessment (Con't)

- In order to complete the practice guide and assessment, you must have a **PA Actions Data Sheet** which contains values that _must_ be entered in certain fields when going through the exercises.

- **To obtain the PA Actions Practice Guide, Assessment, and Data Sheet, send an e-mail to IRISTraining@email.uky.edu with "PA Actions Request" in the Subject line.**

- **Please wait until you have completed _this_ course before proceeding with the PA Actions Practice Guide and PA Actions Assessment.**

Click anywhere on this slide to advance to the last slide of this course.

Course Completion

- To complete this WBT, click on the yellow **Log off** button in the lower corner of this window.

  [Log off]
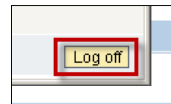
  - **Note**: This window will close, and you should be returned to the main, myTraining page for this WBT. The main page will refresh (usually within 30 seconds, depending on network traffic), and you should receive a green, system message confirming your participation.

    Your participation in this course has been completed.

    You may then safely navigate away from the main page.