

PA40 – Request a Personnel Action

Process: Use transaction PA40 to request a personnel action for an employee in SAP. The creator should enter the personnel action via transaction PA40. The creator will then review their work and add comments/attachments as needed. The status of the approval workflow can be monitored from transaction PA20, PA30, or PA40.

****Prior to processing this transaction, ensure all necessary authorizations/approvals for this personnel action for the employee have been obtained.**

Role: Authorized Users

Frequency: When needed

Beginning

Enter the transaction code	PA40
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Personnel Actions

Person ID

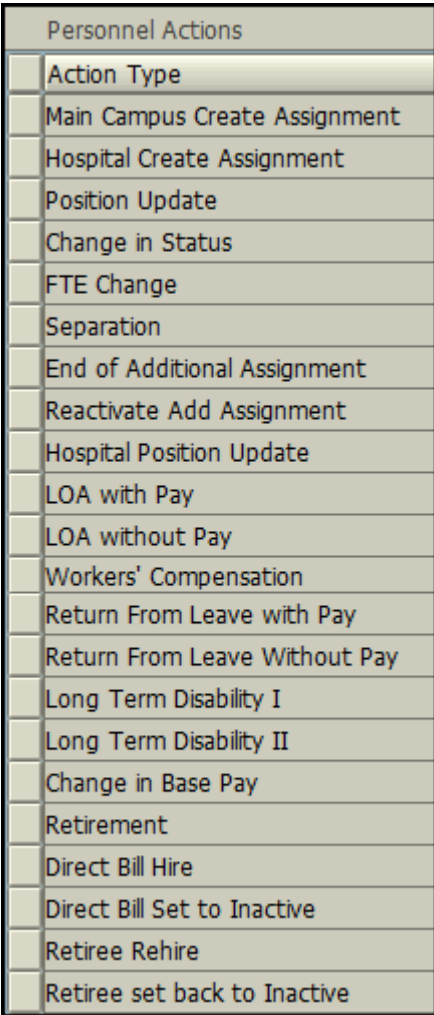
Enter the employee's Person ID or use the **Possible Entries** icon  to select

Press **Enter** to populate the employee's information at the top of the screen

Start


Enter the date in which the change will take effect

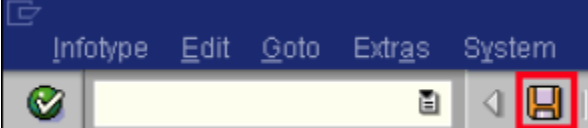
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<p>Click on the Select button to the left of the Action Type to be updated</p>	 <p>A screenshot of a dropdown menu titled "Personnel Actions". The menu lists various action types, each preceded by a small square icon. The first icon is highlighted, indicating it is the selected option.</p> <ul style="list-style-type: none"> Action Type Main Campus Create Assignment Hospital Create Assignment Position Update Change in Status FTE Change Separation End of Additional Assignment Reactivate Add Assignment Hospital Position Update LOA with Pay LOA without Pay Workers' Compensation Return From Leave with Pay Return From Leave Without Pay Long Term Disability I Long Term Disability II Change in Base Pay Retirement Direct Bill Hire Direct Bill Set to Inactive Retiree Rehire Retiree set back to Inactive
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<p>Click on the Execute icon</p>	 <p>A small square icon containing a green checkmark and a downward-pointing arrow, representing the "Execute" function.</p>
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Copy Actions (0000)

<p>Click on the Possible Entries icon in the Reason for Action field, then double-click on the appropriate reason for the change</p>	 <p>A screenshot of a form field labeled "Reason for Action". The field contains a dropdown menu with a yellow background and a "Possible Entries" icon (a square with a magnifying glass) on the right side.</p>
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<p>Complete the change and click the Save icon</p>	 <p>A screenshot of a software menu bar with options: Infotype, Edit, Goto, Extras, System. Below the menu bar is a toolbar with a green checkmark icon, a document icon, a left arrow icon, and a red-bordered "Save" icon (a floppy disk).</p>
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Copy Basic Pay (0008)

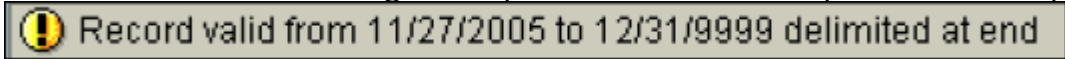
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Enter the new pay rate for the employee in the **Amount** field

Wa...	Wage Type Long Text	O. Amount	Curr...
1005	Hourly Rate	17.00	JSD
			JSD

Press **Enter**, which will populate the **Annual Salary** field

Read the delimit message and press **Enter** to accept – For example:



Click the **Save** icon and exit the transaction

Note: The record will remain locked, until **all** required approval steps are completed. The system will automatically delete the action if a workflow step has not been acted on for 7 calendar days. The approvers listed in the FI approval tables will receive email notifications when a workflow item arrives in their inbox.


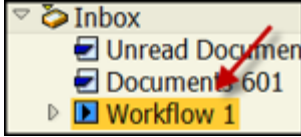
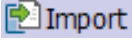
EE group	D	Post Doctorate	Pers.area	1000	Main Campus
EE subgroup	21	Scholars	Pers. subarea	0006	Temp FT
Start	04/01/2018	to	12/31/9999	Chng	03/13/2018 WF-BATCH
					Record is locked

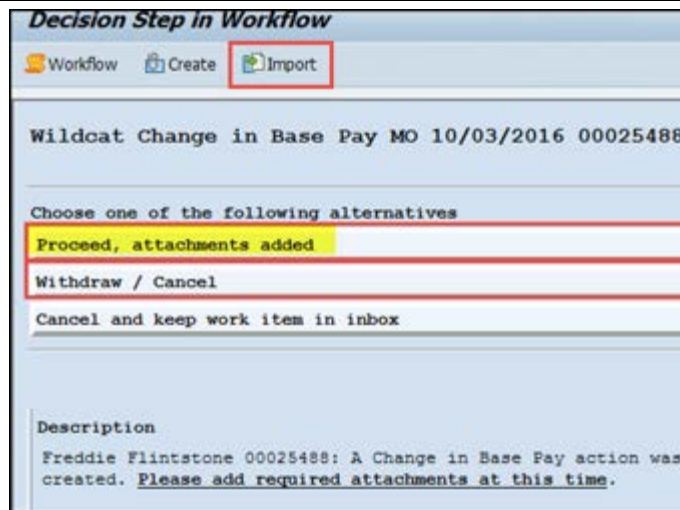
A workflow will be started when actions in the table below are changed.

X` Action Name	Action Type
Reactivate Add Assignment	V2
Position Update	XG
Hospital Position Update	Z4
Worker's Compensation	Z5
Main Campus Create Assignment	ZA
Hospital Create Assignment	ZE
Position Change	ZF
LOA with Pay	ZK
LOA without Pay	ZL
Return From Leave with Pay	ZM
Return From Leave Without Pay	ZN
Change in Base Pay	ZR
Additional Assignment	ZT
Change in Status	ZV
FTE Change	ZW

Review, Add Attachments, & Send for Approval Option 1: SAP

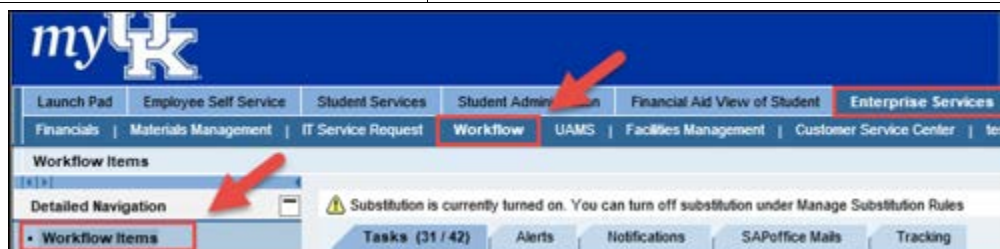
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Access the SAP Business Workplace	Enter transaction SBWP OR Click the SAP Business Workplace icon  in the SAP GUI SAP Easy Access screen
Open the workflow	
Add attachments	Click the  Import button to browse and open files to attach
Send for Approval	Click the 'Proceed, attachments added' button A text box will open to allow for comments to be added



Review, Add Attachments, & Send for Approval Option 2: myUK Portal

Open your workflow tasks	Click on the Enterprise Services tab Click on the Workflow subtab Click on the Workflow Items menu option
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Open the workflow	
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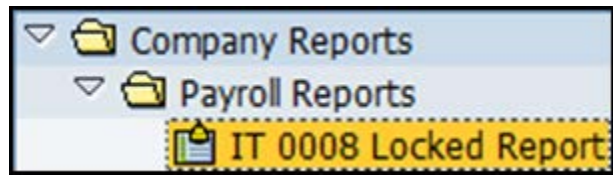
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Add attachments	Click the Manage Attachments button Browse and upload files
Enter comments	
Send for approval	Click the 'Proceed, attachments added' button

Check the Status of a Workflow Option 1: Spinifex Report

This report showing employees with a locked record can be run for individuals or groups

In the /SPIN/ER transaction, open the IT 0008 Locked Report



Enter parameters and run the report

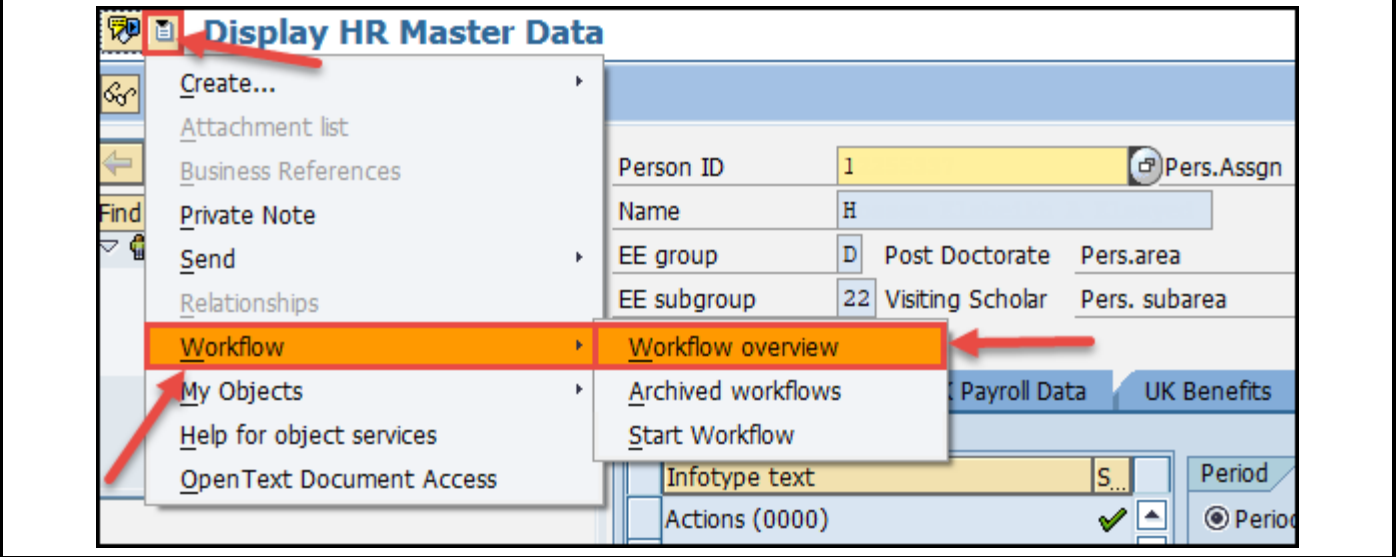
The 'X' in the 'Lock Indicator (IT0008)' column indicates that a Personnel Action workflow is active for this employee

Person Id	Personnel...	Organizati...	Organ...	Organizational unit...	First ...	Last ...	Position	Position - Description	Lock Indicator (IT
1	2	30000245	81140	Veterinary Science	H ...	E ...	5	Post-Doctoral Scholar	X

Check the Status of a Workflow Option 2: HR Transactions – Workflow Log

Look up an employee Transactions PA20, PA30, or PA40

Click 'Workflow' and 'Workflow overview' in the 'Services for Object' drop-down menu



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Select the workflow to display details including statuses, dates, times, and approvers for each step

Click the [Information...](#) link in the **Agent** (rightmost) column to find out who the current approver is

The most recent details are at the bottom of the list

Check the Status of a Workflow

Option 3: HR Transactions – Basic Pay Screens

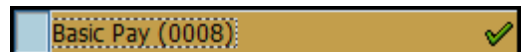
Look up an employee

Transactions PA20, PA30, or PA40

Click the Overview  button

Open the 'Overview Basic Pay (0008) screen

Select the Basic Pay (0008) Infotype



Click the Overview  button

Scroll to view the rightmost column

A lock icon in the rightmost column indicates that a Personnel Action workflow is active for this employee

Start Date	End Date	T...	PSA	PS group	Lv	Amount	Curre...	Annual salary	Curre...	L	
11/01/2017	12/31/9999	01	01	00	01	1,400.00	USD	16,800.00	USD		
08/01/2017	10/31/2017	01	01	00	01	2,800.00	USD	33,600.00	USD		
01/23/2017	07/31/2017	01	01	00	01	0.00	USD	0.00	USD		<input type="text"/>
04/01/2018	12/31/9999	01	01	00	01	3,956.33	USD	47,476.00	USD		

Alternatively, you can double-click the row with the most recent Start Date (the bottom of the list) to open the 'Display Basic Pay (0008)' screen

A lock icon in the bottom right of the header information indicates that a Personnel Action workflow is active for this employee

EE group	D	Post Doctorate	Pers.area	1000	Main Campus
EE subgroup	21	Scholars	Pers. subarea	0006	Temp FT
Start	04/01/2018	to	12/31/9999	Chng	03/13/2018 WF-BATCH
Record is locked					