



Change Position Employee Group/Subgroup (Action 116)

Change Record:

Change Date: 9/26/2013	Changed by: d. lyle
Changes:	<p>New format and screen captures</p> <p>New Additional Resources list at end of document</p> <p>Business Process Procedure Overview:</p> <ul style="list-style-type: none"> • Added new last Par. - <i>Agency to Agency transfers must be completed by BEST Shared Services OM team.</i> <p>Step 4 –</p> <ul style="list-style-type: none"> • New Note: The OM Action should precede the PA Action. <p>Step 7 –</p> <ul style="list-style-type: none"> • Removed text...duplicated from Step 6. <ul style="list-style-type: none"> ○ <i>This PCR number does not mean the record has been submitted to workflow yet, you must still submit the record to workflow. If you have not yet submitted the record to workflow for approval, you may use the PCR number to make changes and save the latest record.</i> <p>Additional Resources –</p> <ul style="list-style-type: none"> • Added Job Aid: Employee Group/Subgroup

Trigger:

There is a need to change the position employee group or employee subgroup.

Business Process Procedure Overview:

This action is used when a change occurs to the appointment type or an FLSA overtime calculation rule for a position.




The position number does not change.

Tips and Tricks:

See the *OM Tips and Tricks Job Aid* for an extended listing of Best Practices and Tips & Tricks. The job aid is located on the Training Help website <http://www.osc.nc.gov/training/osctd/help/> in the following folder: **Organizational Management > Job Aids.**

The following instructions only take the Initiator through changing a Position Employee Group/Subgroup

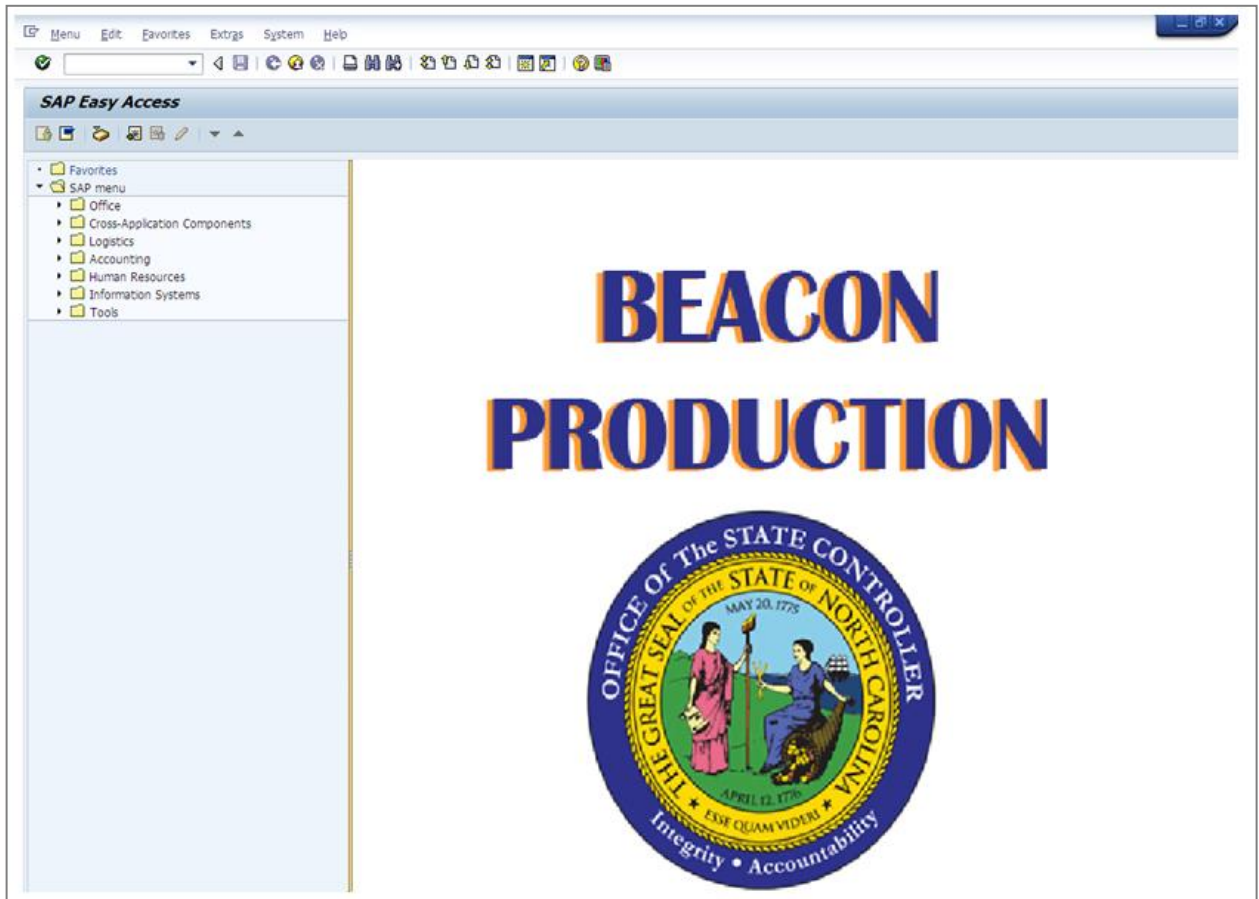
Action (116) PCR, not through the approval process. See the individual instructions per approver level for more details.

- **Display**  is used to access information for display purposes only. No changes can be made to the relationship records. Contact BEST Shared Services for changes.
- **Copy**  is to be used most of the time. This will delimit the existing record and create a new record with the start date given. Copying keeps a history of what the record used to be.
- **Change**  is only to be used if you make a spelling or other simple error, and want to change the record. There is no history tracked on what the record used to be if you use the change functionality.

Access Transaction:

Via Menu Path:	This transaction code is not on the menu path. Enter the transaction code in the Command Field (white field in the upper left hand corner of the screen. If the Command field is not visible, click the gray triangle in this area to display it). Click Enter once the transaction code has been entered.
Via Transaction Code:	ZOMA069


PROCEDURE



1. Update the following field:

Field Name	Description	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	Enter value in Command. Example: ZOMA069

2. Click the **Enter**  button.

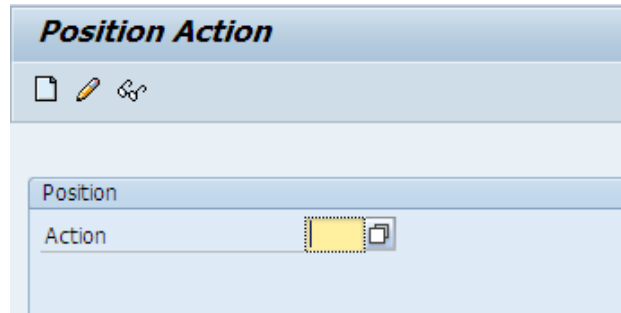
 **Information**

You may want to enter this transaction code in your Favorites folder.

- Choose **Favorites > Insert Favorites**
- Type in **ZOMA076**.
- Click **Enter**.

To see the transaction code displayed in front of the link in your favorites:

- Choose **Edit > Settings**.
- Place a **check** next to Display Technical Name.
- Click **Enter**.



3. Update the following field:




Field Name	Description	Values
Action	A one to four character code that represents an action. An action is a series of procedures that must be completed in order to achieve a specific objective.	Enter value in Action. Example: 116

4. Click the **Enter**  button.

NOTE: The action number to change an Employee/Group/Subgroup on a position is 116. Use the matchcode search for additional OM action options available from this transaction as appropriate.

Clicking Enter will validate the action you have requested and display the date fields for entry.

Position Action

Position


Action Position Employee Group/ Subgroup Change

Position




Valid from to

5. Update the following fields:


Field Name	Description	Values
Position	The SAP eight-digit position code (perform a search for the correct position title) for the position to be maintained	Enter value in Position. Example: 60008554
Valid from	Beginning date of the organizational assignment which identifies the start of a validity period. For existing Legacy positions, the start date was established as 01/01/1900. NOTE: The Validity period, also referred to as the effective date range, identifies the lifespan assigned to an object or an infotype record, or the period of time that these items "exist". Validity periods consist of a start date and end date.	Enter value in Valid from. Example: 10/01/2013

6. Click the **Enter**  button to validate that this is the position with which you wish to work.

Position Action

Position

Action  Position Employee Group/ Subgroup Change

Position Research Assistant

Valid from to

Enter the appropriate effective date value for the Change Position Employee Group/Subgroup action. The Valid from date will serve as the effective date of the position action. The Valid to date will always default the end date to 12/31/9999.

The beginning date should be the date for the Change Position Employee Group/Subgroup action to be valid (it can be dated in the past or in the future). The format can be mm/dd/yyyy, mmdyyy, or mm/dd/yy.


If the position is held by the employee, the effective date for this position action must correspond with the effective date for the corresponding personnel action. Please contact the appropriate HR staff for your agency to coordinate the required OM and PA actions. Use either the PPOSE transaction or the PO13D transaction to determine if the position is currently held by an employee.

NOTE: The OM Action should precede the PA Action.

The Change button is used to change information on a request for a new position PRIOR to it being submitted to workflow. Once the record has been completed, when saving you will receive a PCR (Personnel Change Request) number. This PCR number does not mean the record has been submitted to workflow yet, you must still submit the record to workflow. If you have not yet submitted the record to workflow for approval, you may use the PCR number to make changes and save the latest record.

Once a position request has been submitted to workflow (it has received a PCR number and has been submitted to workflow), it may not be changed until the PCR number has gone through the entire workflow approval process and either successfully been approved, rejected, or cancelled.

7. Click the **Create (F5)**  button.

 Information	The PCR date cannot be changed. If a new date is needed, you must begin a new PCR.
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Once a position request has been submitted to workflow (it has received a PCR number and has been submitted to workflow), it may not be changed until the PCR number has gone through the entire workflow approval process and either successfully been approved, rejected, or cancelled.

Position Employee Group/ Subgroup Change - CREATE

Initiate Work Flow

Position Header

Position: 60008554 Research Assistant Org Unit: 20000871 OSBM ADMIN DEP Tech & Data Svcs
 PCR Number: Reports To: 60008552 Associate State Budget Officer - Dat...
 Valid from: 10/01/2013 to 12/31/9999 Supervisor: WF Status:
 Holder: Personnel area: 0310 State Budget & Management

CURRENT VALUE NEW VALUE

Weekly Work Hours: 40.00
 EE Group: A SPA Employees SPA Employees
 EE Subgroup: A1 FT N-FLSAOT Perm

Time

Overtime Compensation(9005)

Immediate Payout: OR OR
 Comp Aging Limit: 365 Days Days
 Delimit 9005:

Holiday Premium Rate(9010)

Holiday Premium Rate: 50 % %
 Delimit 9010:

Holiday Payout Period(9006)

Immediate Payout: OR OR

On-Call(9011)

On-Call Comp Accrued:
 On-Call Rate: \$ 0.00 \$

8. Update the following fields:

Field Name	Description	Values
Weekly Work Hours	Number of hours scheduled to work in one week	Enter value in Weekly Work Hours. Example: 40
EE Group	Drives benefits eligibility, leave and pay calculations	Enter value in EE Group. Example: A – SPA Employees
EE Subgroup	Code identifying the employees is subject to FLSA overtime, pull/part time status, and other calculation rules	Enter value in EE Subgroup. Example: B1 – FT-S-FLSAOT Perm

9. Click the **Enter**  button.

Position Employee Group/ Subgroup Change - CREATE					
Initiate Work Flow					
Position Header					
Position	60008554	Research Assistant	Org Unit	20000871	OSBM ADMIN DEP Tech & Data Svcs
PCR Number			Reports To	60008552	Associate State Budget Officer - Dat...
Valid from	10/01/2013	to	12/31/9999	Supervisor	
Holder			WF Status		
Personnel area	0310	State Budget & Management			
CURRENT VALUE		NEW VALUE			
Weekly Work Hours	40.00		40.00		
EE Group	A SPA Employees	SPA Employees	A SPA Employees	SPA Employees	
EE Subgroup	A1	FT N-FLSAOT Perm	B1	FT S-FLSAOT Perm	

The system will copy the existing data from the position and default it on screen.

The Header section will default values in these fields:

- Organizational Unit Object Id and Abbreviation
- PCR Number (Number generated by the system for the position action after SAVE)
- Reports To (Supervisor's personnel number and name)
- Valid from (Effective Date based on the value entered on the prior screen)
- Valid to (End date which defaults as 12/31/9999)
- Supervisor (Position's Supervisor)
- Holder (Person assigned to the Position if filled)
- Workflow (WF) Status
 - **N** In Process
 - **R** Rejected
 - **C** Canceled
 - **A** Approved
 - **D** Created
 - **M** Completed
- Personnel area (Agency)

On the General tab, the system will display proposed defaults on the left side of the screen to represent the "current" value for the position. This will include:

- Weekly Work Hours
- Employee Group (Subject/Not Subject to FLSA and overtime provisions)
- Employee subgroup (Work schedule grouping)

NOTE: The data used in this example is provided for sample purposes only. The data will change depending on the Agency and specific position being changed.


BEST BUSINESS PRACTICE: The best practice is to enter any data as appropriate, review all data, and click Enter to allow the system to validate the data.

Several fields on this screen are mandatory. The system will not let you continue if you have not provided data for the mandatory fields. If you are unsure which fields are mandatory, click Enter, and the system will prompt you for information in the mandatory fields.

The Time area contains the fields required for time entry and payroll calculation rules. A position can have one or more fields. The Premium rates are determined from the data saved on the Position in the HR/Payroll system, not what a person enters on their time sheet, so the person hired into this position will automatically receive the premiums which are requested here when they submit their time.

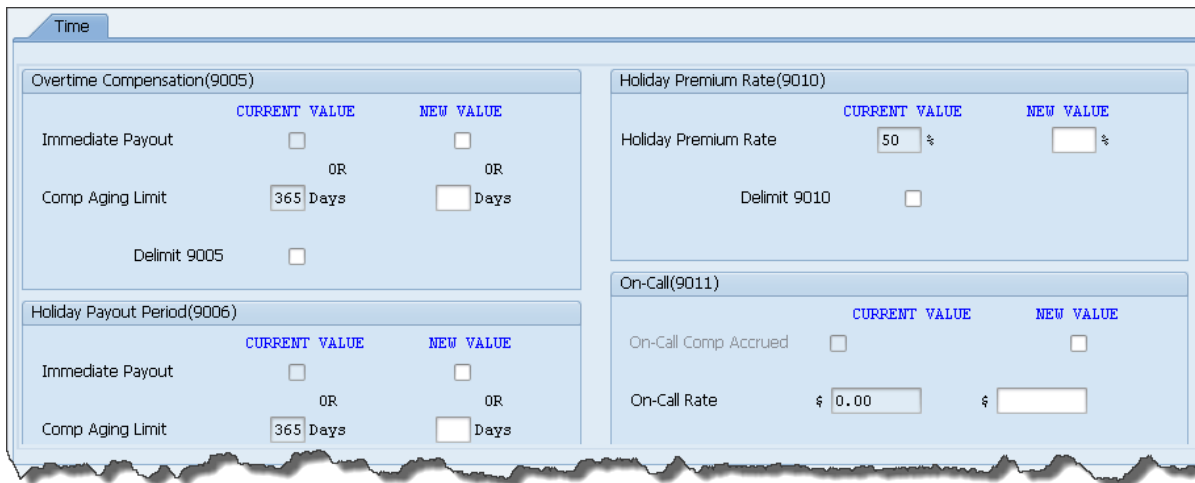
- **Overtime Compensation (IT9005)** - Stores settings related to overtime compensation.
 - If time worked beyond the overtime limit (40 hours, etc.) is to be paid or accumulated as compensatory time, the position must have a valid IT9005 record (which is this area).
 - If overtime compensatory time is to be paid out (FLSA Subject only) or expired (FLSA Not-subject only) at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.).
 - If it is to be paid out immediately, the Immediate Payout checkbox should be checked. The default is 365 days. An IT9005 record is not required if the position is not eligible for overtime pay or compensation.
- **Holiday Payout Period (IT9006)** - Indicates if overtime compensatory time is to be paid out (FLSA Subject only) or expired (FLSA Not-Subject only) at a point earlier than 12 months from when it was earned. The Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). The default is 365 days. If no record exists, the default value of 365 applies. If it is to be paid out immediately, the Immediate Payout checkbox should be checked.
- **Night Shift Prem Rate (IT9007)** - Pay rate increase for Night Shift premium. If OSHR has approved a rate other than the default of 10%, the rate as a percentage must be entered in the rate field.
- **Evening Shift Premium (IT9008)** - Stores settings for positions that are eligible for evening shift premium. OSHR approved rates other than the default of 10% must be entered in the rate field.
- **Weekend Shift Premium (IT9009)** - Stores settings for positions that are eligible for weekend shift premium. The OSHR approved rate other than the default of 10% must be entered in the rate field.
- **Holiday Premium Rate (IT9010)** - Pay rate increase for Holiday Pay. The OSHR approved rate other than the default of 50% must be entered in the rate field.
- **On-call (IT9011)** - Stores settings for positions that are eligible for On-Call compensation. The accrued box should be checked if the time is to be collected as On-Call comp time. The rate field must be populated with the OSHR approved on-call rate.
- **Callback (IT9012)** - Stores settings for positions that are eligible for Callback compensation. The decision to pay or award comp time is determined by the “Immediate Payout” checkbox.
- **Extended Duty (IT9016)** - Stores settings for positions that are eligible for extended duty
- **GAP Hours (IT9017)** - Positions eligible for Gap Hours Comp must have a valid IT9017 record. The decision to pay versus comp time is determined by the existence of the 9017 infotype. Gap Hours are additional hours for Subject- FLSA employees. The “Additional hours” are those hours caught in the gap between the minimum hours of work required and the overtime threshold. These hours are currently being paid at an hour-for-hour rate for Subject-FLSA employees.

BEST BUSINESS PRACTICE: The best practice is to enter any data as appropriate, review all data, and click Enter to allow the system to validate the data.

10. Click the **Enter**  button to display and validate your entries.


You may save this information as many times as you like; each time you will receive a confirmation of the Save. You will not be able to create a note attachment until you have saved it at least once. If you have already submitted the PCR to workflow, you will not be able to change the details, nor save any new information, only display the existing details.

NOTE: On an OM workflow item, you will not see the Initiate Workflow button until you have saved the information at least once.



Section	Field	Current Value	New Value
Overtime Compensation(9005)	Immediate Payout	<input type="checkbox"/>	<input type="checkbox"/>
	OR		
	Comp Aging Limit	365 Days	<input type="text"/> Days
	Delimit 9005	<input type="checkbox"/>	
Holiday Premium Rate(9010)	Holiday Premium Rate	50	<input type="text"/>
	Delimit 9010	<input type="checkbox"/>	
	OR		
Holiday Payout Period(9006)	Immediate Payout	<input type="checkbox"/>	<input type="checkbox"/>
	OR		
	Comp Aging Limit	365 Days	<input type="text"/> Days
	Delimit 9005	<input type="checkbox"/>	
On-Call(9011)	On-Call Comp Accrued	<input type="checkbox"/>	<input type="checkbox"/>
	On-Call Rate	0.00	<input type="text"/>

You would normally change time settings as necessary. If no setting changes are necessary, continue processing the change record.

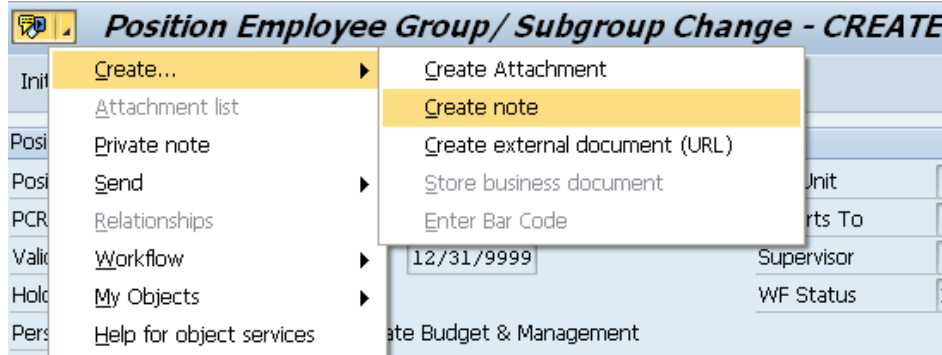
11. Click the **Save (Ctrl+S)**  button.


You will receive the following confirmation at the bottom left-hand corner of the screen.



NOTE: On an OM workflow item, you will not see the Initiate Workflow button until you have saved the information at least once.


You will not be able to create a note attachment until you have saved it at least once. If you have already submitted the PCR to workflow, you will not be able to change the details, nor save any new information, only display the existing details.



12. Click the **Services for Objects**  button.

13. Click **Create... >> Create note**.


You may enter any information that would be useful to the approvers down the line in the approval process using the notes area, or attachment area. If you just need to type some information in, or copy and paste from an email, create a note. If you want to add a document as an attachment, use the attachment area.

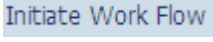
 Information	Your Notes on PCRs stay on the PCR. If you need your note on the position, it must be entered on the position to enter this transaction code in your Favorites folder.
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The screenshot shows a 'Create note' dialog box. At the top, there is a title bar with a close button. Below it, a text field labeled 'Title of note' contains the text 'Change Position 60008554 EG/ESG'. Below the text field is a large text area with the instruction: 'Enter information as appropriate to support the change of employee group or employee subgroup for the position.' At the bottom right of the dialog box, there are two buttons: a green checkmark icon (OK) and a red 'X' icon (Cancel).

14. Update the following fields:

Field Name	Description	Values
Title of note	The short text to act as the title of the attachment	Enter value in Title of note. Example: Change Position 60008554 EG/ESG
Long text	An open text field	Enter value in Long text. Example: text as appropriate

15. Click the **Copy (Enter)**  button.

16. Click the **Initiate Work Flow**  button.

Select the Initiate Workflow button to send the Position Employee Group/Subgroup Change action through the approval process. No changes can be made after the PCR has been submitted for approval, unless the PCR is rejected at any stage and sent back to you (the initiator/requestor).

If you do not want to initiate workflow at this time, you may access the Position Employee Group/Subgroup Change action using the **Change** mode after you have entered both the original validity dates and the position number from transaction code ZOMA069 at any point in the future, up until the request has been submitted to workflow.

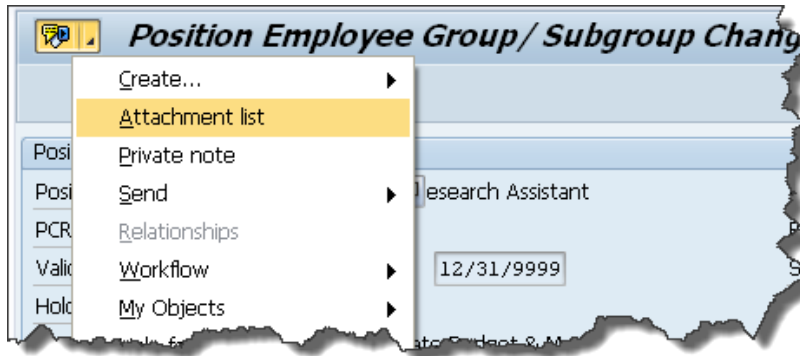
Notice the **Save** confirmation at the bottom of the screen. You may adjust and save the data as many times as you like prior to submitting to workflow. Once you Initiate Workflow, changes may not be made to this action.


This position data in the HR/Payroll system is held in the Planned status until the workflow has gone through the entire approval process. If the workflow is approved, all of the data on the various infotypes will be moved into the Active status on the position. If the workflow is rejected or cancelled, the data will be moved into the Rejected status on the position.

Once position data has been saved, it is in Planned status on the position.

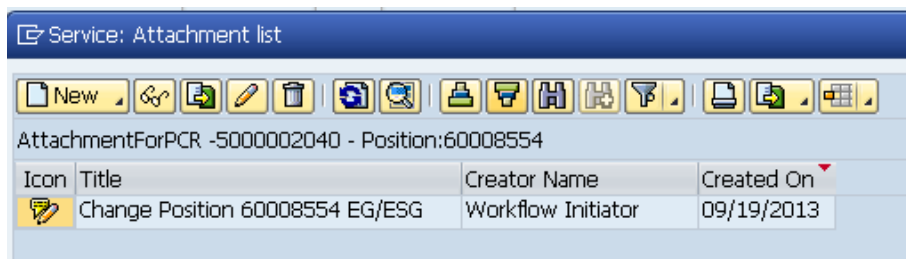
17. Click the **Display (F7)**  button.



Once the PCR has been submitted, you will only be able to display the data (including any notes and attachments which may have been saved on the PCR).



18. Click the **Services for Objects**  button.
19. Click **Attachment list**.

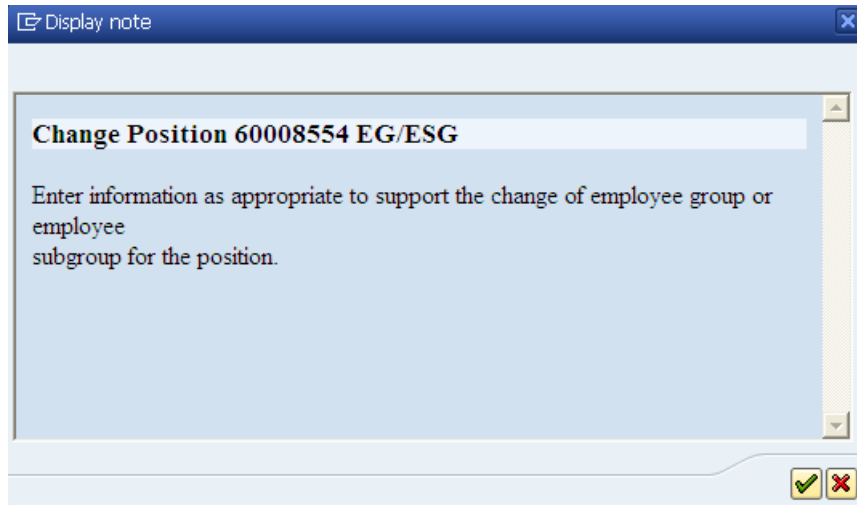
The PCR information is displayed. At any time, to display the notes/attachments on this PCR, choose the Services for Objects button and if the Attachments option is valid, there is at least one attachment available.




20. Click the **Note title**  **Change Position 60008554 EG/ESG** button.
21. Click the **Display (F7)**  button.

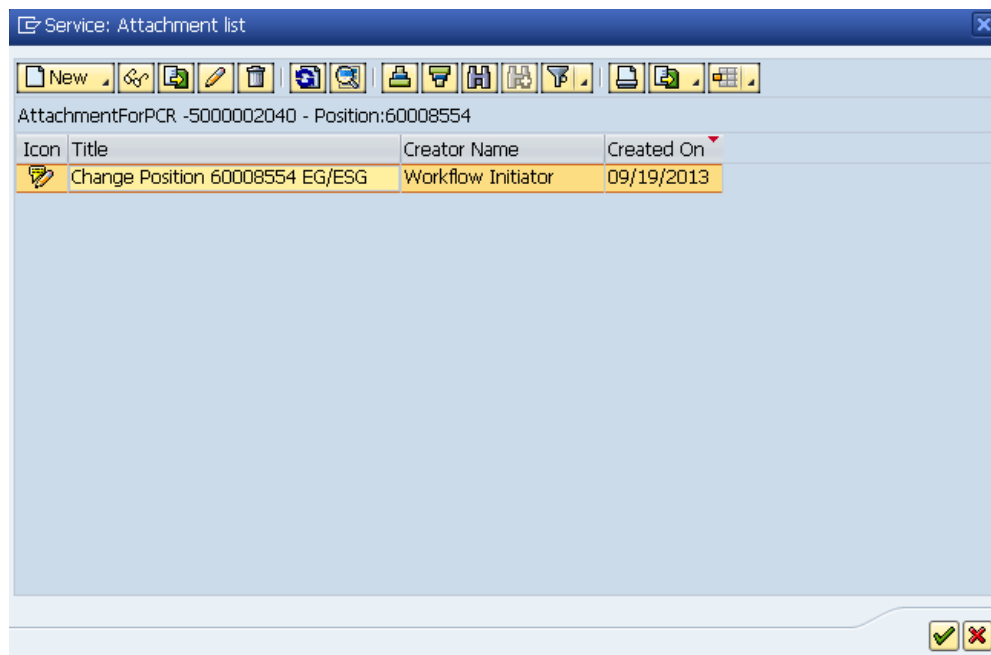
If you receive a window requesting you to choose between PCR attachments, choose the attachment corresponding to the PCR number with which you are working. This extra window does not normally display.

If multiple notes and/or attachments have been added to this PCR, they will be listed here. This is where you would display and copy the data if you wanted to also attach the notes/attachments to the corresponding Action once approved.



22. Click the **Copy (Enter)**  button.

Review the information as appropriate, and close the window when complete. This text may be copied using CTRL-C and pasted into another note attachment to an Action.



23. Click the **Continue (Enter)**  button.

Position Employee Group/ Subgroup Change - DISPLAY

Position Header

Position 60008554 research Assistant Org Unit 20000871 OSBM ADMIN DEP Tech & Data Svcs
PCR Number 5000002040 Reports To 60008552 Associate State Budget Officer - Dat
Valid from 10/01/2013 to 12/31/9999 Supervisor In Process
Holder WF Status N
Personnel area 0310 State Budget & Management

CURRENT VALUE NEW VALUE

Weekly Work Hours 40.00 40.00
EE Group A SPA Employees SPA Employees A SPA Employees SPA Employees
EE Subgroup A1 FT N-FLSAOT Perm B1 FT S-FLSAOT Perm

Cost Distribution Time



Total Budgeted Amount 41,600.00 Action/Reason Code 200 1 Active

Master cost center 0399999999 GOV/OSBM

COAr	Cost ctr	Order	WBS element	Name	Pct.	Name of
0301	0310	1000000		OSBM ADMIN DEP Tech & Data Svcs	100.00	0310 01

24. Click the **Back (F3)**  button.

Position Action

Position

Action 116 Position Employee Group/ Subgroup Change
Position 60008554 Research Assistant
Valid from 10/01/2013 to 12/31/9999

25. Click the **Back (F3)**  button.

The system task is complete.

ADDITIONAL RESOURCES

Training HELP website: <http://www.osc.nc.gov/training/osctd/help/>

Links to:

Student Guides	<ol style="list-style-type: none">OM210: Organizational Management for Agencies<ul style="list-style-type: none"><i>Training HELP website > Student Guides</i>
Job Aids	<ol style="list-style-type: none">OM FieldsEmployee Group/Subgroup<ul style="list-style-type: none"><i>Training HELP website > OM > Job Aids</i>