



Enter Personnel Action - Employee to Working Retiree Benefits Eligible (PA40)

Purpose

Use this procedure to enter an employee to working retiree benefits eligible.

Trigger

Perform this procedure when an employee retires then returns to work for the City to continue to receive benefits.

Prerequisites

- Personnel Number (PERNR) or
- Employee Name

Menu Path

Use the following menu path to begin this transaction:

- N/A

Transaction Code

- PA40

Helpful Hints

- R/O/C column in tables represents Required, Optional, or Conditional entry.



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Procedure

1. Start the transaction using the menu path or transaction code. The *Personnel Actions* screen displays.

Personnel Actions

Action Type	Personn.	EE group	EE subg..
New Hires			
Change In Pay			
Temporary Actions			
Regular Actions			
Status Changes			
Ext of Temporary Appt			
End of Temp Assn/Retrn to Prev			
Leave of Absences - UnPaid			
Leave of Absences - Paid			
Return from Leave			
Layoffs			
Separations			
Rehires			
Retirement			
Employee to WR Benefit Eligible			

2. As required, complete/review the following fields:


Field	R/O/C	Description
Personnel no.	R	A unique, identification number for personnel assigned as it is processed in SAP; the system automatically assigns this number. Example: 100041



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3. Click **Enter** button  .

4. Click **From** field .

 Make sure this is the appropriate personnel number/employee.

5. As required, complete/review the following fields:

Field	R/O/C	Description
From	R	Beginning value to be entered when specifying a range. Example: 12/31/2008

6. Select **Employee to WR Benefit Eligible** list item .

7. Click **Execute** button  . The *Copy Actions (0000)* screen displays.



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Copy Actions (0000)

The screenshot shows the SAP 'Copy Actions (0000)' form. The top bar includes the SAP logo and menu options: Infotype, Edit, Goto, Extras, System, Help. Below the title bar are buttons for 'Execute info group' and 'Change info group'. The form contains the following fields:

- Pers.No.:** 100041
- Name:** Justin Acton
- EE group:** 1 Regular
- Pers.area:** 1220 Cable
- EE subgroup:** 03 FT Exempt, Negative
- Pers. subarea:** 3000 Non Rep
- Status:** Active
- Start:** 12/31/2008 to 12/31/9999

Personnel action

- Action Type:** Employee to WR Benefit Eligible
- Reason for Action:** Employee to WR Benefit Eligible

Status

- Customer-specific:** 0
- Employment:** Active
- Special payment:** Standard wage type


Organizational assignment

- Position:** 40000011 Cbl/Fr PM
- Personnel area:** 1220 Cable
- Employee group:** 1 Regular
- Employee subgroup:** 03 FT Exempt, Negative

Additional actions

Start Date	Act	Action Type	ActR	Reason for action

The bottom status bar shows: HRMONICA sapqr2 INS

8. Click **Reason for Action** field .
9. Click **Reason for Action** matchcode  . The *Reason for Action (XXXX)* dialog box displays.



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Reason for Action (XXXX) YYYY Entry found

A... Name of Action Type	Ac... Name of reason for action
UD Employee to WR Benefit Eligible	Employee to WR Benefit Eligible

10. Double-click **UD Employee to WR Benefit Eligible** list item **UD Employee to WR Benefit Eligible**



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Copy Actions (0000)

The screenshot shows the SAP HR Copy Actions (0000) interface. The main data area contains the following information:

Pers.No.	100041				
Name	Justin Acton				
EE group	1 Regular	Pers.area	1220 Cable		
EE subgroup	03 FT Exempt, Negative	Pers. subarea	3000 Non Rep	Status	Active
Start	12/31/2008	to	12/31/9999		

Personnel action

Action Type	Employee to WR Benefit Eligible
Reason for Action	Employee to WR Benefit Eligible

Status

Customer-specific	0
Employment	Active
Special payment	Standard wage type

Organizational assignment

Position	40000011 Cbl/Fr PM
Personnel area	1220 Cable
Employee group	1 Regular
Employee subgroup	03 FT Exempt, Negative

Additional actions

Start Date	Act	Action Type	ActR	Reason for action
12/31/2008	UD	Employee to WR Benefit Eligible		Employee to WR Benefit Eligible

11. Click **Employee group** field .
12. Click **Employee group** matchcode . The *Employee Group (XXXX)* dialog box displays.



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Employee Group (XXXX) YYYY Entries found

EEGrp	Name of EE group
1	Regular
3	Casual
4	Casual Other
5	Limited Duration
7	Temp (Budgeted)
B	Work Ret - Ben Elig
C	Work Ret - Non Ben
D	At-Will
E	Elected Official
F	Executive

13. Double-click **B Work RET - Ben Elig** list item **B** Work Ret - Ben Elig .



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Copy Actions (0000)

The screenshot shows the SAP HR Copy Actions (0000) interface. The top bar includes the SAP logo and navigation icons. The main area is titled "Copy Actions (0000)" and contains several sections:

- Employee Data:** Pers.No. 100041, Name Justin Acton, EE group 1 Regular, Pers.area 1220 Cable, EE subgroup 03 FT Exempt, Negative, Pers. subarea 3000 Non Rep, Status Active, Start 12/31/2008 to 12/31/9999.
- Personnel action:** Action Type Employee to WR Benefit Eligible, Reason for Action Employee to WR Benefit Eligible.
- Status:** Customer-specific 0, Employment Active, Special payment Standard wage type.
- Organizational assignment:** Position 40000011 Cbl/Fr PM, Personnel area 1220 Cable, Employee group B Regular, Employee subgroup 03 FT Exempt, Negative.
- Additional actions:** A table with columns Start Date, Act, Action Type, ActR, and Reason for action. The first row shows 12/31/2008, UD, Employee to WR Benefit Eligible, and Employee to WR Benefit Eligible.

14. Click **Employee subgroup** field .
15. Click **Employee subgroup** matchcode . The *Employee subgroup (XXXX)* dialog box displays.



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Employee subgroup (XXXX) YYYY Entries found

Employee subgroup (1) 8 Entries found

Restrictions

EEGrp	Name of EE group	ESgrp	Name of EE subgroup
B	Work Ret - Ben Elig	02	FT Covered, Positive
B	Work Ret - Ben Elig	06	PT Covered, Positive
B	Work Ret - Ben Elig	10	Less 1/2 Covrd, Pos
B	Work Ret - Ben Elig	18	FT Exempt, Positive
B	Work Ret - Ben Elig	19	FT Exempt OT, Pos
B	Work Ret - Ben Elig	20	PT Exempt, Positive
B	Work Ret - Ben Elig	21	PT Exempt OT, Pos
B	Work Ret - Ben Elig	22	Less 1/2 Exmpt, Pos

8 Entries found

16. Double-click **B Work Ret - Ben Elig 18 FT Exempt, Positive** list item



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B Work Ret - Ben Elig 18 FT Exempt, Positive

Copy Actions (0000)

The screenshot shows the SAP 'Copy Actions (0000)' screen. At the top, there are menu options: Infotype, Edit, Goto, Extras, System, Help. Below the menu is a toolbar with various icons. The main area contains the following data:

Copy Actions (0000)

Execute info group | Change info group

Pers.No. 100041
 Name Justin Acton
 EE group 1 Regular Pers.area 1220 Cable
 EE subgroup 03 FT Exempt, Negative Pers. subarea 3000 Non Rep Status Active
 Start 12/31/2008 to 12/31/9999

Personnel action

Action Type Employee to WR Benefit Eligible
 Reason for Action Employee to WR Benefit Eligible

Status

Customer-specific 0
 Employment Active
 Special payment Standard wage type

Organizational assignment

Position 40000011 Cbl/Fr PM
 Personnel area 1220 Cable
 Employee group B Regular
 Employee subgroup 18 FT Exempt, Negative

Additional actions

Start Date	Act	Action Type	ActR	Reason for action
12/31/2008	UD	Employee to WR Benefit Eligible		Employee to WR Benefit Eligible

At the bottom right, there are system indicators: HRMONICA, sapqr2, INS.

17. Click **Enter** button . The *Copy Actions (0000)* screen updates.

18. Click **Enter** button .

The system returns the message, "Person and position have different employee groups/subgroups".

19. Click **Save** button . The *Create Organizational Assignment (0001)* screen displays.



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Create Organizational Assignment (0001)


The screenshot shows the SAP 'Create Organizational Assignment (0001)' screen. The interface includes a menu bar (Infotype, Edit, Goto, Extras, System, Help) and a toolbar with various icons. The main content area is divided into several sections:

- Personnel Data:** Personnel No: 100041, Name: Justin Acton, EE group: 1 Regular, Pers.area: 1220 Cable, EE subgroup: 03 FT Exempt, Negative, Pers. subarea: 3000 Non Rep, Status: Active, Start: 12/31/2008 to 12/31/9999.
- Enterprise structure:** CoCode: CDP1 City of Portland, Pers.area: 1220 Cable, Subarea: 3000 Non Rep, Cost Ctr: CBCF000001 Cable, Bus. Area: CB00 Cable Comm and Franc, Fund: [empty].
- Personnel structure:** EE group: B Work Ret - Ben Elig, Payr.area: Z1 CoP Bi-Weekly, EE subgroup: 18 FT Exempt, Positive, Contract: [empty].
- Organizational plan:** Percentage: 100.00, Position: 40000011 Cbl/Fr PM, Job key: 30000703 Cbl/Fr PM, Exempt: E, Org. Unit: 20000215 Cbl&RegSvcs Cable Regulatory Servic.
- Assignment:** An 'Assignment' button is visible.
- Administrator:** Time and PayrAdmin checkboxes are present.

The status bar at the bottom shows 'HRMONICA sapqr2 INS'.

20. Click **Enter** button  . The *Create Organizational Assignment (0001)* screen updates.

21. Click **Save** button  . The *Create Planned Working Time (0007)* screen displays.

 The system returns the message, "Record valid from XXXX to YYYY delimited at end".



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Create Planned Working Time (XXXX)

The screenshot shows the SAP 'Create Planned Working Time (0007)' form. The top menu bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. The title bar shows 'SAP'. The main form area is titled 'Create Planned Working Time (0007)' and contains the following fields:

Personnel No	100041	Name	Justin Acton
EE group	1 Regular	Pers.area	1220 Cable
EE subgroup	03 FT Exempt, Negative	Pers. subarea	3000 Non Rep
Status	Active		
Start	12/31/2008	To	12/31/9999

Work schedule rule

Work schedule rule	80008
Time Mgmt status	9 - Time evaluation of planned times
Working week	Working Week Starting Thursday
Additional time ID	

Working time

Employment percent	100.00	<input type="checkbox"/> Dyn. daily work schedule			
Daily working hours	0.00	Min.		Max.	
Weekly working hours	0.00	Min.		Max.	
Monthly working hrs	0.00	Min.		Max.	
Annual working hours	0.00	Min.		Max.	
Weekly workdays	0.00				

Record created

22. Click **Work schedule rule** field .



The system returns the message, "Record created".



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Create Planned Working Time (0007)

23. Click **Work schedule rule** matchcode  . The *Restrict Value Range (XXXX)* dialog box displays.



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Restrict Value Range (XXXX) YYYY Entry found

Restrict Value Range (1) 1 Entry found							
Restrictions							
ESG	Holiday Cal. ID	PSG	WS rule	Work schedule rule text	PWS	Start Date	End Date
3	ZP	10	OPEN24-7	24-7 Positive Emps Only	00A0	01/01/2007	12/31/9999



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- 24. Select 3 ZP 10 OPEN-24/7 list item .
- 25. Click **Enter (continue)** button . The *Create Planned Working Time (0007)* screen updates.

Create Planned Working Time (0007)

The screenshot shows the SAP 'Create Planned Working Time (0007)' screen. At the top, there is a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main content area is titled 'Create Planned Working Time (0007)' and contains a 'Work schedule' section. This section includes a table with the following data:

Personnel No	100041	Name	Justin Acton
EE group	8 Work Ret - Ben Elig	Pers.area	1220 Cable
EE subgroup	18 FT Exempt, Positive	Pers. subarea	3000 Non Rep
Status	Active		
Start	12/31/2008	To	12/31/9999

Below the table, there is a 'Work schedule rule' section with the following fields:

- Work schedule rule: OPEN24-7
- Time Mgmt status: 1 - Time evaluation of actual times
- Working week: Working Week Starting Thursday
- Additional time ID: (empty)

At the bottom of the screen, there is a 'Working time' section with the following fields:

- Employment percent: 100.00
- Daily working hours: 0.00
- Weekly working hours: 0.00
- Monthly working hrs: 0.00
- Annual working hours: 0.00
- Weekly workdays: 0.00
- Dyn. daily work schedule
- Min. and Max. fields for daily, weekly, monthly, and annual working hours.

The bottom status bar shows 'HRMONICA', 'sapqr2', and 'INS'.

- 26. Click **Enter** button . The *Create Planned Working Time (0007)* screen updates.
 - 27. Click **Save** button . The *Create Basic Pay (0008)* screen displays.
- The system returns the message, "Save your entries".



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Create Basic Pay (0008)

28. Click **Reason** field .

The system returns the message, "Record created".

29. Click **Reason** matchcode . The *Reason for Changing Master Data (XXXX)* screen displays.



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Reason for Changing Master Data (XXXX) YYYY Entries found

Re	Reason Text
00	Step Increase - Rep
01	Merit Increase - Non Rep
02	New Hire/Rehire
03	Promotion
04	Premium Assignment
05	Temporary Assign
06	End of Temp Assign
07	Status Change
08	Lateral
09	Demotion
10	Return from Leave of Absence
11	COLA (Cost of Living)
12	Special Assignment Pay
13	Movement on the Range
14	Labor Contract Change
15	Class/Comp Change
16	Step Increase - Cert Attained
17	Step Increase - Apprentice
18	Red Circle Adjustment
19	Position Change Only

30. Double-click **07 Status change** list item **07 Status Change**



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Create Basic Pay (0008)

The screenshot shows the SAP 'Create Basic Pay (0008)' transaction. The main data area contains the following information:

Personnel No	100041	Name	Justin Acton
EE group	B Work Ret - Ben Elig	Pers.area	1220 Cable
EE subgroup	18 FT Exempt, Positive	Pers. subarea	3000 Non Rep
Status	Active		
Start	12/31/2008	to	12/31/9999


Subtype: Basic contract

Salary

Reason	07	Capacity Util. Level	100.00
PS type	02 Nonrepresented	Work hours/period	BI-weekly
PS Area	NR NONREP	Next increase	
PS group	H6R00090	Level	01
Annual salary			USD

Wage Type	Long Text	Amount	Curr.	I	A	Number/Unit	Unit
0H00	Regular Hourly Pay		USD	I	<input checked="" type="checkbox"/>		
			USD		<input type="checkbox"/>		

IV 12/31/2008 - 12/31/9999 0.00 USD Payroll Simulation

31. Click **Level** field .
32. Click **Level** matchcode  . The *Pay Scale Level (XXXX)* dialog box displays.



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Work Instruction


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Pay Scale Level (XXXX) YYYY Entry found

CGrpg	Ty.	PSA	Grade	Lvl	Min. grade lev...	Max. grade le...	Crcy	Start Date	End Date
10	02	NR	HGR00090	01	30.78	41.18	USD	01/01/2000	12/31/9999



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- 33. Double-click **10 02 NR HGR00090 01** list item **10 02 NR HGR00090 01**.
- 34. Click **Enter (continue)** button . The *Create Basic Pay (0008)* screen updates.

Change Basic Pay (0008)

The screenshot shows the SAP 'Change Basic Pay (0008)' interface. Key fields include:

- Personnel No:** 100041, **Name:** Justin Acton
- EE group:** B Work Ret - Ben Elig, **Pers.area:** 1220 Cable
- EE subgroup:** 18 FT Exempt, Positive, **Pers. subarea:** 3000 Non Rep, **Status:** Active
- Start:** 12/31/2008 to 12/31/9999, **Chng:** 12/25/2008 HRMONICA
- Subtype:** 0 Basic contract
- Salary Section:**
 - Reason:** 07 Status Change, **Capacity Util. Level:** 100.00
 - PS type:** 02 Nonrepresented, **Work hours/period:** Bi-weekly
 - PS Area:** NR NONREP, **Next increase:** (empty)
 - PS group:** HGR00090, **Level:** 01, **Annual salary:** (empty) USD
- Table:**

Wage Type Long Text	Amount	Curr.	I.	A.	Number/Unit	Unit
0000 Regular Hourly Pay		USD		<input checked="" type="checkbox"/>		
		USD		<input type="checkbox"/>		
- Payroll Simulation:** IV 12/31/2008 - 12/31/9999, 41.18 USD

- 35. As required, complete/review the following fields:

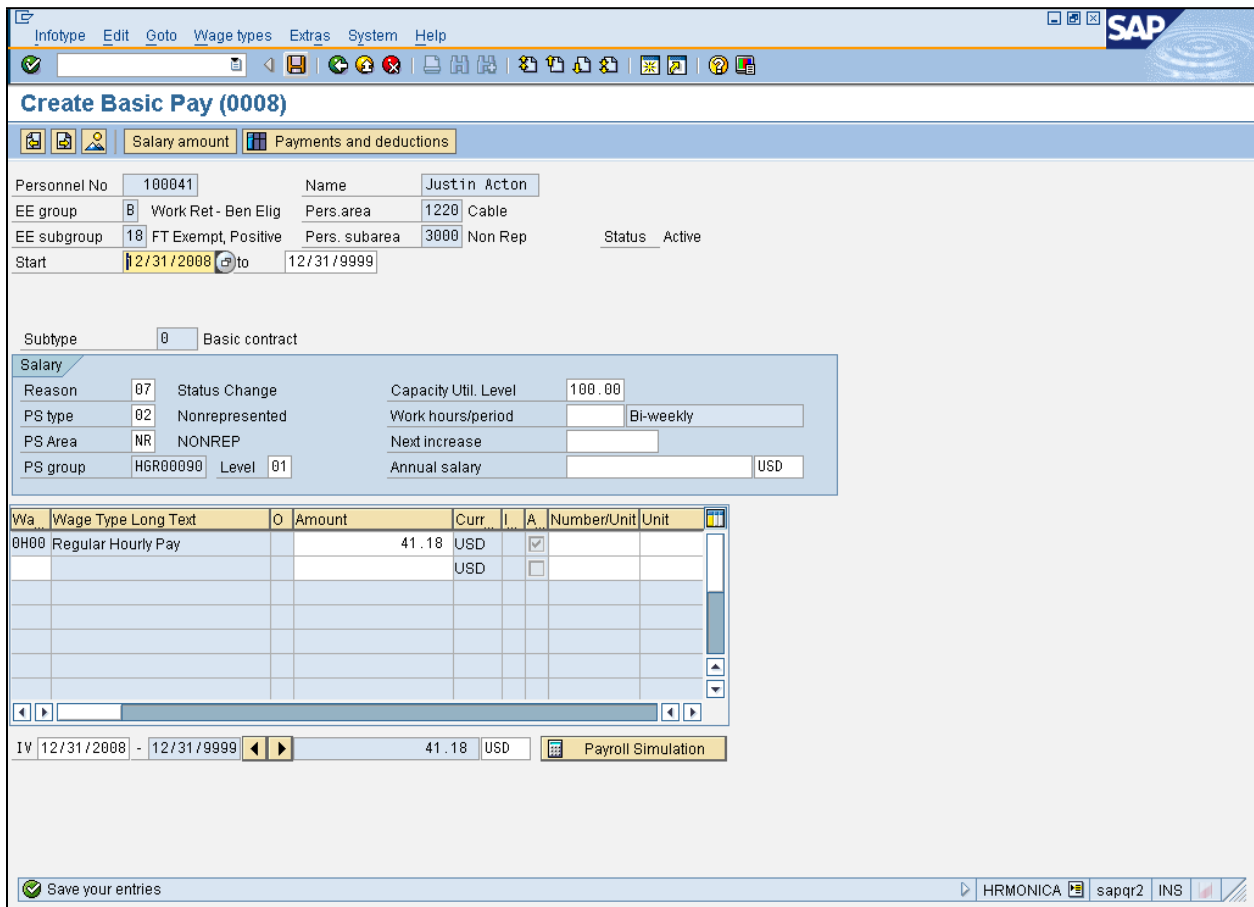
Field	R/O/C	Description
Amount	R	Figure within the pricing procedure that determines how the system calculates a condition value. Example: 41.18



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36. Click **Enter** button  . The *Create Basic Pay (0008)* screen updates.

Create Basic Pay (0008)



The screenshot shows the SAP 'Create Basic Pay (0008)' screen. The top menu bar includes 'Infotype', 'Edit', 'Goto', 'Wage types', 'Extras', 'System', and 'Help'. The title bar shows 'SAP' and window control buttons. Below the title bar, there are tabs for 'Salary amount' and 'Payments and deductions'. The main data area contains the following fields:


- Personnel No: 100041, Name: Justin Acton
- EE group: B Work Ret - Ben Elig, Pers.area: 1220 Cable
- EE subgroup: 18 FT Exempt, Positive, Pers. subarea: 3000 Non Rep, Status: Active
- Start: 12/31/2008 to 12/31/9999
- Subtype: 0 Basic contract

The 'Salary' section includes:

- Reason: 07 Status Change, Capacity Util. Level: 100.00
- PS type: 02 Nonrepresented, Work hours/period: Bi-weekly
- PS Area: NR NONREP, Next increase: [empty]
- PS group: HGR00090, Level: 01, Annual salary: [empty] USD

Below the salary section is a table with columns: 'Wage Type Long Text', 'O', 'Amount', 'Curr.', 'I', 'A', 'Number/Unit', and 'Unit'. The first row shows '0H00 Regular Hourly Pay' with an amount of 41.18 USD and a checked box in the 'I' column. Below the table, there is a 'Payroll Simulation' button and a summary line: 'IV 12/31/2008 - 12/31/9999 41.18 USD Payroll Simulation'. At the bottom, there is a 'Save your entries' button and a status bar with 'HRMONICA', 'sapqr2', and 'INS'.

37. Click **Save** button  . The *Copy Date Specifications (0041)* screen displays.

 The system returns the message, "Save your entries".



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Copy Date Specifications (0041)

The screenshot shows the SAP 'Copy Date Specifications (0041)' screen. At the top, the SAP logo and menu bar are visible. The main area contains the following data:

Personnel No	100041	Name	Justin Acton
EE group	1 Regular	Pers.area	1220 Cable
EE subgroup	03 FT Exempt, Negative	Pers. subarea	3000 Non Rep
Status	Active		
Start	12/31/2008	to	12/31/9999

Date Specifications (0041)			
Date type	Date	Date type	Date
01 Original Hire Date	07/24/2008	U1 City Service Date	07/24/2008
U2 Job Class Annv. Date	07/24/2008	U3 Vac Accrual Date	07/24/2008
U4 Date last Worked	12/31/2008	U8 Bureau Start Date	07/24/2008

At the bottom of the screen, a status bar indicates 'Record created' and shows the user 'HRMONICA' in session 'sapqr2'.

38. Click **Save** button . The *Create Monitoring of Tasks (0019)* screen displays.

The system returns the message, "Record created".





Enter Personnel Action - Employee to Working Retiree Benefits Eligible (PA40)

Create Monitoring of Tasks (0019)

The screenshot shows the SAP 'Create Monitoring of Tasks (0019)' interface. At the top, there is a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main content area is titled 'Create Monitoring of Tasks (0019)'. It contains several input fields and sections:

- Personnel Data:** Personnel No. 100041, Name Justin Acton, EE group 1 Regular, Pers.area 1220 Cable, EE subgroup 03 FT Exempt, Negative, Pers. subarea 3000 Non Rep, Status Active.
- Task Section:** Task Type (dropdown menu), Date of Task (checkbox), Processing indicator (New task).
- Reminder Section:** Reminder Date (input field), Lead/follow-up time (input fields).
- Comments Section:** Three empty text input lines.

At the bottom of the window, the taskbar shows 'HRMONICA', 'sapqr2', and 'INS'.

39. Click **Task Type** combo box  .
40. Select **Max. of Wrk. Ret Hrs** list item  .
41. As required, complete/review the following fields:


Field	R/O/C	Description
Date of Task	R	Task type effective date. Example: 06/01/2009



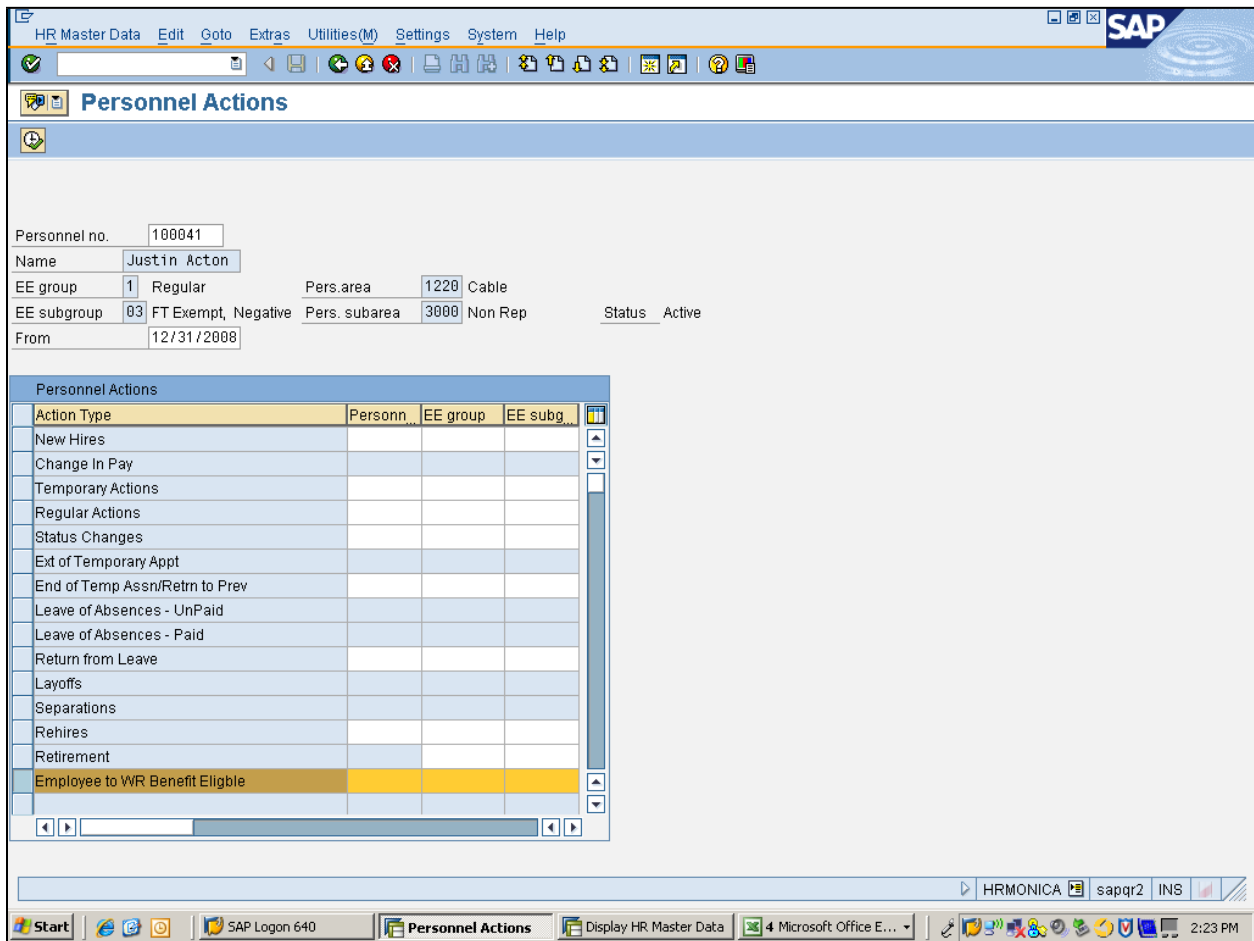
Enter Personnel Action - Employee to Working Retiree Benefits Eligible (PA40)

42. Click **Enter** button  .The *Create Monitoring of Tasks (0019)* screen updates.

43. Click **Save** button  .

 The system returns the message, "Save your entries".

Personnel Actions



The screenshot shows the SAP HR Master Data 'Personnel Actions' screen. At the top, there is a menu bar with 'HR Master Data', 'Edit', 'Goto', 'Extras', 'Utilities(M)', 'Settings', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area contains a form with the following fields:

- Personnel no.: 100041
- Name: Justin Acton
- EE group: 1 Regular
- Pers.area: 1220 Cable
- EE subgroup: 03 FT Exempt, Negative
- Pers. subarea: 3000 Non Rep
- Status: Active
- From: 12/31/2008

Below the form is a table titled 'Personnel Actions' with the following columns: Action Type, Personn..., EE group, and EE subg... The table lists various action types, with 'Employee to WR Benefit Eligible' highlighted in yellow.

Action Type	Personn...	EE group	EE subg...
New Hires			
Change In Pay			
Temporary Actions			
Regular Actions			
Status Changes			
Ext of Temporary Appt			
End of Temp Assn/Retrn to Prev			
Leave of Absences - UnPaid			
Leave of Absences - Paid			
Return from Leave			
Layoffs			
Separations			
Rehires			
Retirement			
Employee to WR Benefit Eligible			

At the bottom of the screen, there is a taskbar with the Start button, SAP Logon 640, Personnel Actions, Display HR Master Data, Microsoft Office E..., and a system tray showing the time as 2:23 PM.

44. Click **Exit** button  .



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Work Instruction

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Result

You have entered a personnel action on a employee to WR benefits eligible.