



PA40

Work Instruction

Enter Personnel Action - Retirement (PA40)

Purpose

Use this procedure to execute a retirement action for an employee.

Trigger

Perform this procedure when an employee is retiring from the City.

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

The screenshot shows the SAP 'Personnel Actions' screen. The title bar includes 'HR Master Data Edit Goto Extras Utilities(M) Settings System Help' and the SAP logo. The main window title is 'Personnel Actions'. On the left, there is a search sidebar with 'Find by' options: 'Person', 'Collective search help', 'Search Term', and 'Free search'. The main area contains a search form with 'Personnel no.' and 'From' fields. Below the search form is a table titled 'Personnel Actions' with columns: 'Action Type', 'Personn...', 'EE group', and 'EE subg...'. The table lists various action types, with 'New Hire' highlighted in yellow. Other listed actions include Change In Pay, Temporary Action, Regular Action, Status Change, Exit of Temporary Appt, End of Temp Assn/Retrn to Prev, Leave of Absence - UnPaid, Leave of Absence - Paid, Return from Leave, Layoff, Separation, Rehire, Retirement, and Employee to WR Benefit Eligible. The 'Retirement' row is currently selected.

2. Click **Personnel no.** field .
3. Click **Personnel no.** matchcode . The *Personnel Number (XXXX)* dialog box displays.



Enter Personnel Action - Retirement (PA40)

Personnel Number (XXXX)

Personnel Number (1)

Last name - First name Personnel ID Number Organizational assignment

Last name

First name

✓ ✗ ⓘ ✕

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

Field	R/O/C	Description
Last name	R	Surname; the name used to identify the individual. Example: *

5. Click **Enter (continue)** button  .



Enter Personnel Action - Retirement (PA40)

Personnel Number (XXXX) YYYY Entries found

Last name	First na...	Title	Pers.No.
Acton	Justin		00100041
Albarado	Rebecca		00100005
Appleby	Shannon		00100088
Barnes	Stephanie		00100038
Barrera	Greg		00100048
Bates	Loretta		00100053
Blue	Suzan		00100046
Booth	Mollie		00100025
Borders	Joyce		00100096
Boyd	Tony		00100050
Branson	Eric		00100011
Burlingame	Betty		00100004
Castellano	Charlene		00100022
Cobb	Quinn		00100081
Cornish	Vera		00100031
Cousin	Jerome		00100047
Eldred	Shawn		00100002
ESS	Test		00100097
Eves	Eric		00100115
Ferro	Michael		00100007
FILO 21	Test		00100101
FILO 22	Test		00100102
FILO 23	Test		00100103
FILO 24	Test		00100104
FILO 25	Test		00100105
FILO 26	test		00100106
FILO 27	test		00100107
FILO 28	Test		00100108
FILO 29	test		00100109
Filo 33	IT2.5		00100112
Filo 35	IT2.5		00100113



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6. Select **Eves Eric 00100115** list item Eves Eric 00100115
7. Click **Enter (continue)** button

Personnel Actions

The screenshot shows the SAP Personnel Actions screen. The 'Personnel no.' field is populated with '00100115'. A list of action types is displayed, with 'Retirement' selected. The list includes:

Action Type	Personn...	EE group	EE subg...
New Hire			
Change In Pay			
Temporary Action			
Regular Action			
Status Change			
Ext of Temporary Appt			
End of Temp Assn/Retrn to Prev			
Leave of Absence - UnPaid			
Leave of Absence - Paid			
Return from Leave			
Layoff			
Separation			
Rehire			
Retirement			
Employee to WR Benefit Eligible			


8. Select **Retirement** list item Retirement
9. As required, complete/review the following fields:

Field	R/O/C	Description
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Enter Personnel Action - Retirement (PA40)

Field	R/O/C	Description
From	R	Beginning value to be entered when specifying a range. Example: 2/27/09

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

Copy Actions (0000)

The screenshot shows the SAP 'Copy Actions (0000)' screen. 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 divided into several sections:

- Personnel Data:** Pers.No. 100115, Name Eric Eves, EE group 1 Regular, Pers.area 1160 Parks, EE subgroup 02 FT Covered, Positive, Pers. subarea 3090 Rec Laborers, Status Active, Start 02/27/2009 to 12/31/9999.
- Personnel action:** Action Type Retirement, Reason for Action (empty field).
- Status:** Customer-specific 0, Employment Withdrawn, Special payment No special payment.
- Organizational assignment:** Position 40002652 RecCrd I-G, Personnel area 1160 Parks, Employee group 1 Regular, Employee subgroup 02 FT Covered, Positive.
- Additional actions:** A table with columns Start Date, Act, Action Type, ActR, and Reason for action.

11. Click **Reason for Action** field .
12. Click **Reason for Action** matchcode  . The *Reason for Action (XXXX)* dialog box displays.



Enter Personnel Action - Retirement (PA40)

Reason for Action (XXXX) YYYY Entry found

A...	Name of Action Ty...	Ac...	Name of reason for acti...
U7	Retirement	01	Retirement

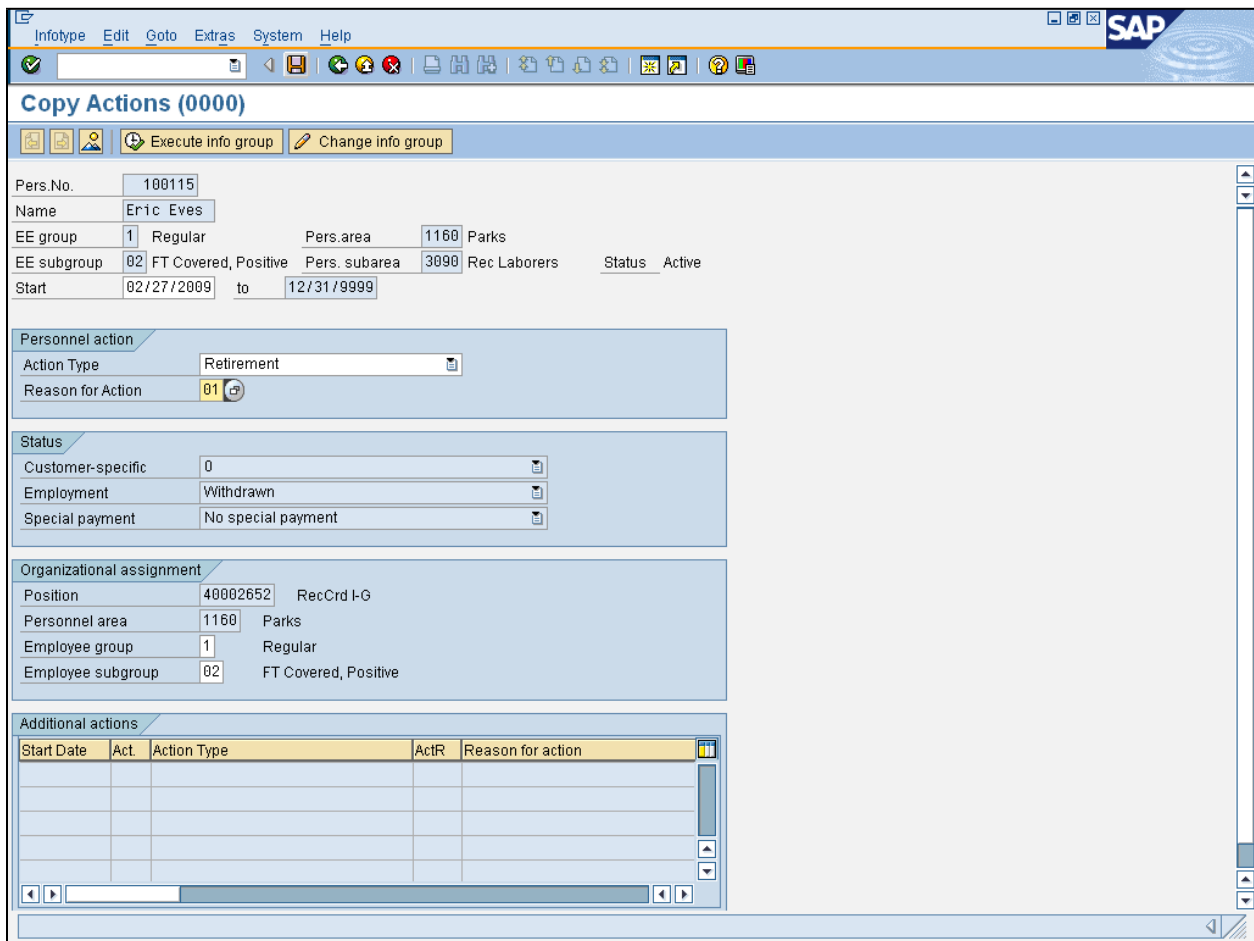
13. Select **U7 Retirement** list item **U7 Retirement** .



Enter Personnel Action - Retirement (PA40)



14. Click **Enter (continue)** button  .


Copy Actions (0000)



The screenshot shows the SAP 'Copy Actions (0000)' form. The form is titled 'Copy Actions (0000)' and includes a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main form area contains several sections:

- Personnel Data:** Pers.No. 100115, Name Eric Eves, EE group 1 Regular, Pers.area 1160 Parks, EE subgroup 02 FT Covered, Positive, Pers. subarea 3090 Rec Laborers, Status Active, Start 02/27/2009 to 12/31/9999.
- Personnel action:** Action Type Retirement, Reason for Action 01.
- Status:** Customer-specific 0, Employment Withdrawn, Special payment No special payment.
- Organizational assignment:** Position 40002652 RecCrd I-G, Personnel area 1160 Parks, Employee group 1 Regular, Employee subgroup 02 FT Covered, Positive.
- Additional actions:** A table with columns Start Date, Act, Action Type, ActR, and Reason for action.

15. Click **Save** button  to validate information.
16. Click **Save** button  . The *Create Vacancy* dialog box displays.

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



Enter Personnel Action - Retirement (PA40)

Create Vacancy

Create Vacancy

S 40002652 Recreation Coord I-Generalist

Create on

Yes No

17. Click Yes button .

Copy Organizational Assignment (0001)

Infotype Edit Goto Extras System Help SAP

Copy Organizational Assignment (0001)

Org Structure

Personnel No	100115	Name	Eric Eves
EE group	1 Regular	Pers.area	1160 Parks
EE subgroup	02 FT Covered, Positive	Pers. subarea	3090 Rec Laborers
Start	02/27/2009 to		12/31/9999
Status	Withdraw		

Enterprise structure

CoCode	COP1	City of Portland	Subarea	3090	Rec Laborers
Pers.area	1160	Parks	Bus. Area	PK00	Portland Parks and Recreat
Cost Ctr	PKPR000023	St. Johns CC	Fund	100000	General Fund
Grant	NOT-RELEVANT	NOT-RELEVANT			
Func. Area	PRREGSCS0000006P	Community and Socializati			

Personnel structure

EE group	1 Regular	Payr.area	Z1	CoP	Bi-Weekly
EE subgroup	02 FT Covered, Positive	Contract			


Organizational plan


Position	99999999	99999999	Administrator	Time	
Job key	30000276	Recreation Coord I-Gen	PayAdmin		
Exempt	N				
Org. Unit	20000648				


Record created



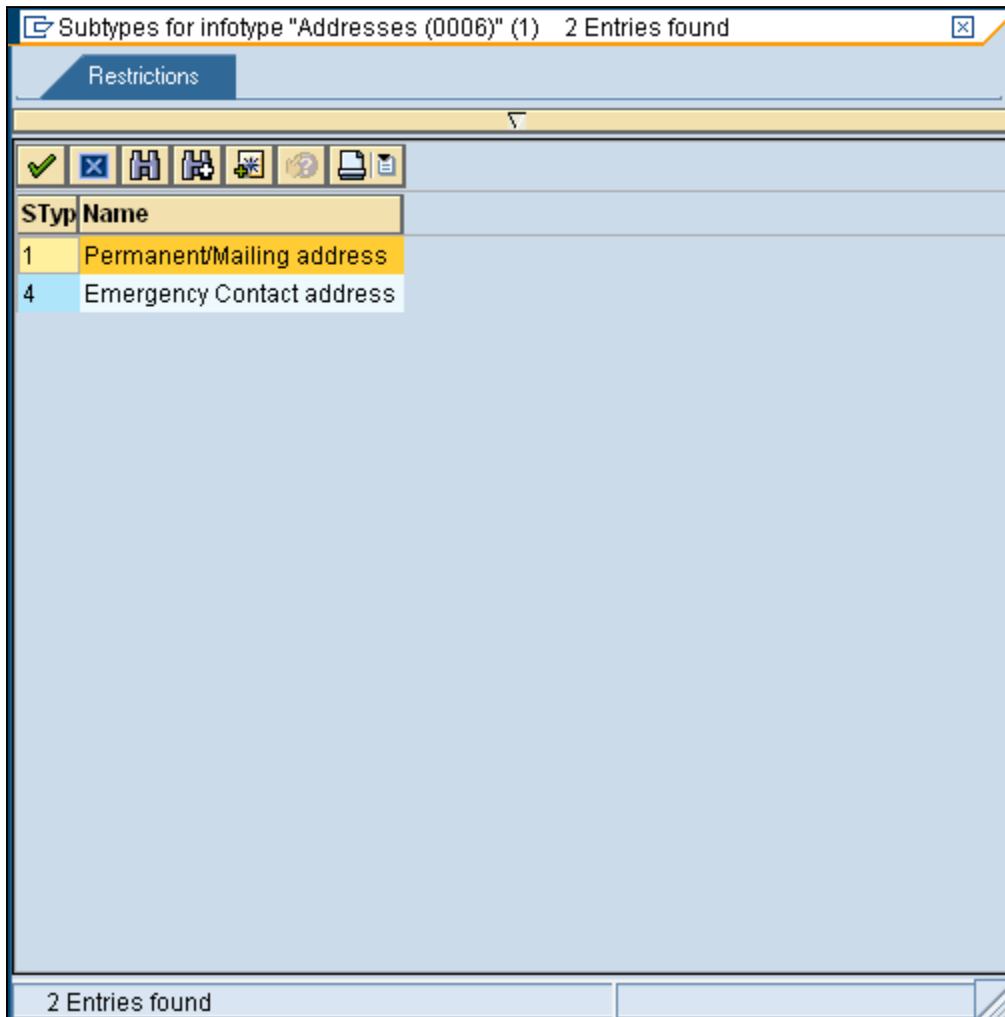
Enter Personnel Action - Retirement (PA40)


18. Click **Enter** button  . The *Copy Organizational Assignment (0001)* screen updates.

 The system returns the message, "Record created".

19. Click **Save** button  . The *Subtypes for infotype "Addresses (0006)" (XXXX)* dialog box displays.

Subtypes for infotype "Addresses (0006)" (XXXX) YYYY Entries found



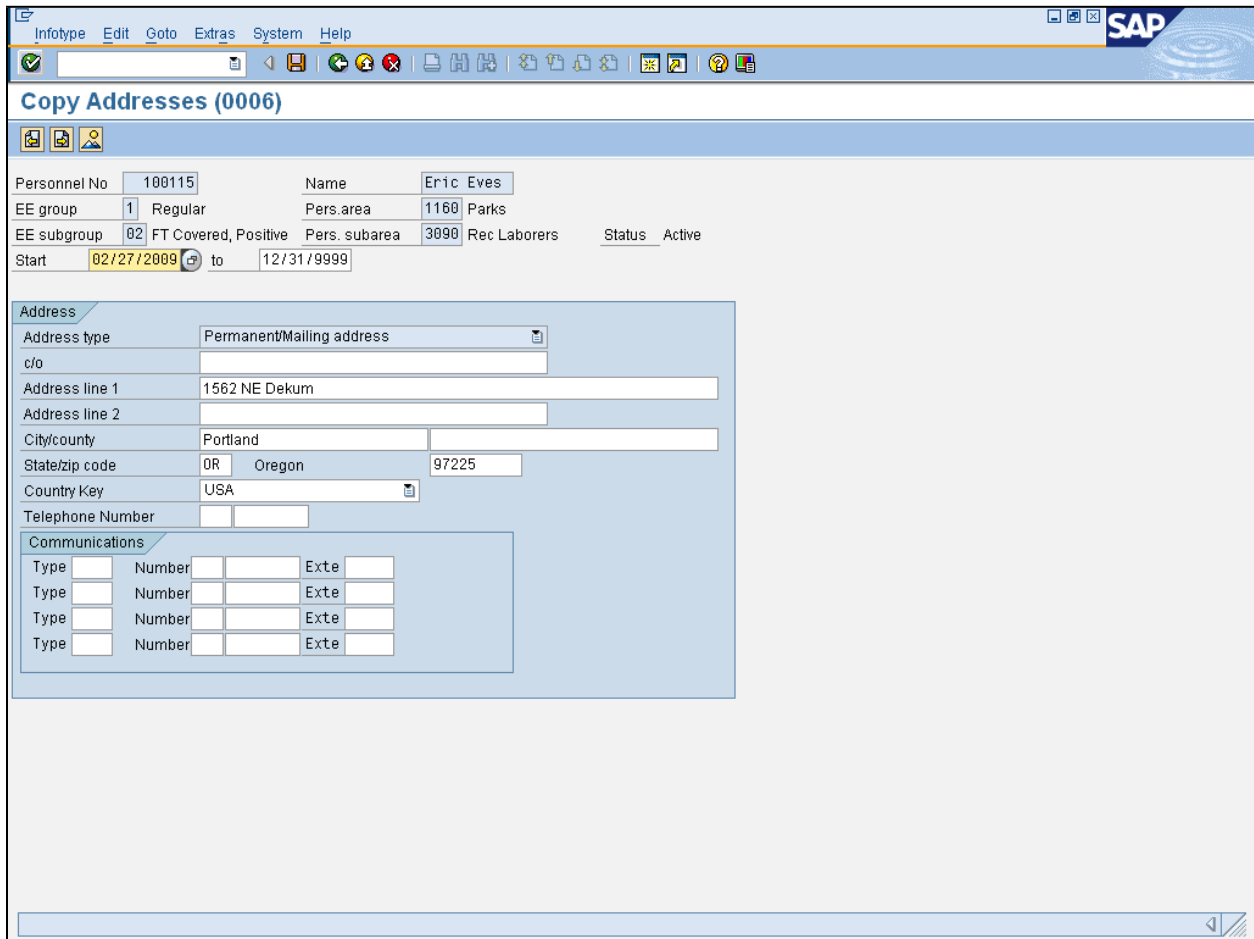
20. Select **1 Permanent/Mailing address** list item  .



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21. Click **Enter (continue)** button  .

Copy Addresses (0006)



The screenshot shows the SAP 'Copy Addresses (0006)' screen. The top menu bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. The SAP logo is in the top right corner. The main area contains the following data:

Personnel No	100115	Name	Eric Eves
EE group	1 Regular	Pers.area	1160 Parks
EE subgroup	02 FT Covered, Positive	Pers. subarea	3090 Rec Laborers
Status	Active		
Start	02/27/2009	to	12/31/9999


Address

Address type	Permanent/Mailing address		
c/o			
Address line 1	1562 NE Dekum		
Address line 2			
City/county	Portland		
State/zip code	OR Oregon	97225	
Country Key	USA		
Telephone Number			


Communications

Type	Number	Exte
Type	Number	Exte
Type	Number	Exte
Type	Number	Exte

22. Click **Enter** button  . The *Copy Addresses (0006)* screen updates.

 Insert forwarding address if needed.

23. Click **Save** button  . The *Change Date Specifications (0041)* screen displays.

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



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Change Date Specifications (0041)

Personnel No: 100115 Name: Eric Eves
 EE group: 1 Regular Pers.area: 1160 Parks
 EE subgroup: 02 FT Covered, Positive Pers. subarea: 3090 Rec Laborers Status: Active
 Start: 02/27/2009 to 12/31/9999 Chng: 02/11/2009 CCASTRUITA_Z

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 Anrv. Date	07/24/2008	U3 Vac Accrual Date	07/24/2008
U4 Date last Worked	02/26/2009	U5 Separation Date	02/27/2009
U8 Bureau Start Date	07/24/2008		

Record created

24. Click **Enter** button

The system returns the message, "Record created".

System enters **Date Last Worked** automatically.

25. Click **Save** button . The *Create Bank Details (0009)* screen displays.



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Create Bank Details (0009)


The screenshot shows the SAP 'Create Bank Details (0009)' screen. The top menu bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. The SAP logo is in the top right corner. The main area contains the following data:

Personnel No	100115	Name	Eric Eves
EE group	1 Regular	Pers.area	1160 Parks
EE subgroup	02 FT Covered, Positive	Pers. subarea	3090 Rec Laborers
Status	Withdraw		
Start	02/27/2009	to	12/31/9999

Bank details	
Bank details type	Main bank
Payee	Eric Eves
Postal Code/City	97225 Portland
Bank Country	USA
Bank Key	
Bank Account	
Bank control key	<input type="checkbox"/>
Payment method	H Payroll Check
Purpose	
Payment currency	USD

26. Click **Enter** button  . The *Create Bank Details (0009)* validates the information.

27. Click **Save** button  . The *Delimit Communication (0105)* screen displays.

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



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Delimit Communication (0105)

The screenshot shows the SAP 'Delimit Communication (0105)' screen. 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 area contains a form with the following fields:


Personnel No	100115	Name	Eric Eves				
EE group	1 Regular	Pers.area	1160 Parks				
EE subgroup	02 FT Covered, Positive	Pers. subarea	3090 Rec Laborers	Status	Active		
Choose	02/27/2009	To	12/31/9999	STy.	0001	Delimit.Date	02/27/2009

Below the form is a table with the following columns: Start Date, End Date, Co., Name, ID/number, and a list icon. The table contains one row:

Start Date	End Date	Co.	Name	ID/number	
07/24/2008	12/31/9999	0001	System user name (SY-UN/EVES)		

At the bottom of the screen, there is a status bar that says 'Record created' and a '1 of 1' entry indicator.

28. Select **07/24/2008 12/31/9999** list item  .

 The system returns the message, "Record created".

29. Click **Delimit** button  . The *Personnel Actions* screen displays.



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Personnel Actions

HR Master Data Edit Goto Extras Utilities(M) Settings System Help

Personnel Actions

Find by
 Person
 Collective search help
 Search Term
 Free search

Personnel no. 100115
 Name Eric Eves
 EE group 1 Regular Pers. area 1160 Parks
 EE subgroup 02 FT Covered, Positive Pers. subarea 3090 Rec Laborers Status Active
 From 02/27/2009

Action Type	Personn...	EE group	EE subg...
New Hire			
Change In Pay			
Temporary Action			
Regular Action			
Status Change			
Ext of Temporary Appt			
End of Temp Assn/Retrn to Prev			
Leave of Absence - UnPaid			
Leave of Absence - Paid			
Return from Leave			
Layoff			
Separation			
Rehire			
Retirement			
Employee to WR Benefit Eligible			

Records delimited

30. Click **Exit** button  .



The system returns the message, "Records delimited".



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Result

You have performed a retirement action for an employee.