

PA Actions Review [PA HR Business Partner Approver]

Module: PA, Processes & Forms Application // Process: Bureau approver reviews actions submitted by OBPA's for processing.

PA Form Used: Personnel Action Request Form (PAR)

Business Process Notes

What You Will Need to Know	What It Is	Where to Find It
Reason Code for Action	What action are you performing (e.g. New Hire).	Refer [here] to choose the appropriate action.
Begin Date of Action	Self-explanatory.	Supervisor or new hire paperwork.
Assignment End Date	Self-explanatory.	Supervisor or new hire paperwork.
Type of Appointment	Temp, Casual/Other, PERS Retiree, Recruitment	Supervisor or new hire paperwork.
Org. Mgmt. Actions	Over/Under/Lateral Fill, Double Fill	Supervisor or new hire paperwork.
Hiring Incentives	The 3 choices that can be selected as incentives.	Supervisor or new hire paperwork.
Position Number	The thing that is "held" by the employee; a place in the organization where the employee resides.	Supervisor or OM Bureau Specialist
Personnel Area	An employee's bureau (e.g. 1150 – Bureau of Police, 1240 – OMF-Human Resources, etc.)	You
Personnel Subarea	The employee's representation type (e.g. 3000 – Non-Rep., 3110 COPPEA, 3150-DCTU-AFSCME)	Auto fills, but can be changed. Refer [here] to determine variance from the auto-filled choice.
Employee Group	Auto fills, but can be changed.	Supervisor or new hire paperwork.
Work Schedule of Employee	Hours the employee is scheduled to work.	Supervisor or new hire paperwork.
Pay of the Employee	Pay Grades = must know the exact bi-weekly or hourly pay amount. Pay Scales = only need to know the pay step.	Supervisor or new hire paperwork.
Justification for Action	Why are you requesting this action?	Supervisor or new hire paperwork.

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The screenshot shows the City of Portland Oregon website. The top navigation bar includes 'Services', 'Visiting', 'Government', 'Bureaus', 'Community', 'Employees', and 'Business'. The 'Employees' menu item is highlighted with a red box. Below the navigation bar is a large image of a bridge over water. Below the image is a 'Sign-In' form. The 'Sign-In' form has two columns. The left column contains a 'PortlandOregon.gov User Name' field with the value 'pftestom2', a 'Password' field with masked characters, and a 'Sign-In' button. The right column contains a 'New to PortlandOregon.gov?' section with a 'Create a New Account' button. The 'Sign-In' button and the 'PortlandOregon.gov User Name' field are highlighted with a red box.

Documents Covering PA Actions in this Workflow:

1. Employee to Retiree
2. Extend Temporary Appointment
3. New Hire
4. Regular Action
5. Rehire
6. Status Change
7. Temporary / Limited Duration Appt.
8. Bureau Approver Review
9. BHR Business Partner Review (this document)
10. BHR Final Review
 1. BHR Review
 2. PA Initiator Completes Long-Form
 3. BHR Completes Review

The Organizational Bureau Personnel Administrator (OBPA) begins the process by using the PA Actions form through the SAP Portal and routes the form to an Approver. As an HR Business Partner Approver your role is to review the submitted action before sending to BHR Services for a final review and processing.

01 BEGIN

Login to your PortlandOregon.gov account.

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02

Enter the SAP Portal by clicking on "SAP CityLink Portal" on the Employee Portal Web Page.

The screenshot displays the 'Employee Portal' for City of Portland employees. The top navigation bar includes links for Home, Employee Services, Forms Library, Policies & Procedures, Training & Development, Benefits & Wellness, About The City, and Contact Us. A left sidebar contains a vertical menu with the same categories. Below the menu is an RSS subscription button. The main content area features a large image of three people working outdoors. Below the image are two columns of links. The 'Employee Services' column lists 'SAP CityLink Portal' (highlighted with a red box), 'Office 365 Portal', and 'Online Pay Statements'. The 'Forms Library' column lists 'Accounting Forms', 'Attorney's Office Forms', 'Auditor's Office Forms', and 'Budget Forms'.

Employee Portal

For all City of Portland employees

Employee Services
Forms Library
Policies & Procedures
Training & Development
Benefits & Wellness
About the City
Contact Us

Subscribe to RSS

MOST POPULAR

- Employee Services
- SAP CityLink Portal
- Travel
- Online Pay Statements
- Travel Authorization Form

VIEW MORE

MOST RECENT

Employee Services

Access SAP portal for your time sheet, leave balances, and CityLearner; log onto your Outlook account from home; access your W-2

- ▶ **SAP CityLink Portal**
- ▶ Office 365 Portal
- ▶ Online Pay Statements

Forms Library

Links to internal forms from various bureaus

- ▶ Accounting Forms
- ▶ Attorney's Office Forms
- ▶ Auditor's Office Forms
- ▶ Budget Forms

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The screenshot shows the SAP CityLink portal for a Business Partner. The top navigation bar includes 'The CITY OF PORTLAND Oregon | SAP CityLink' and 'PortlandOregon.gov Log off'. Below the navigation bar, there are three main folders: 'Employee Self-Service', 'Business Partner' (highlighted with a red box), and 'Employee Programs'. The 'Business Partner' folder is selected, and the main content area displays an 'Overview' section. The 'Overview' section contains the following information:

- Personal Information**: Manage your contact information. Quick Links: [My Personal Data](#), [My Address Information](#), [My Communication Information](#), [Validate Social Security Information](#).
- Time - Read Only**: View your time sheet and leave balances. Quick Links: [My Time Sheet](#), [My Time Requests](#), [My Time Statement](#), [Leave Balances](#).
- Compensation**: View your pay statement and change your tax withholdings. Create, view and/or change your banking details. Quick Links: [My Pay Statement](#), [My Tax Withholding \(W-4\)](#), [My Banking Information](#), [My Pay Statement Delivery Method](#).
- CityLearner**: Manage your training activities, view training history, and search the training catalog. Quick Links: [CityLearner](#), [Training History Report](#).
- Help**: View Help Documents and Frequently Asked Questions (FAQs). Quick Links: [ESS Help](#).

03

Once logged into the SAP Portal, click on the **Business Partner** folder.

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04

This is your “Landing Page” for Processes & Forms. From here you run reports, continue with saved work, or process items sent to you through workflow. Click on the **Work In Progress expander button**.

HR Business Partner

Reports

Work In Progress

Arch/Recds - Hire an Employee - Third Step
Priority: Medium
Creation Date: 04/20/2016

Items Saved as drafts or that are routed to you through workflow are found in the “Work in Progress” swim lane. If you don’t see Work In Progress on your landing page, click the gear icon to add it.

Each white box displayed here is called a “Swim Lane” and can be moved easily by dragging and dropping into the position you prefer.

As an HRBP, you will only have the Reports and Work in Progress swim lanes available to you.

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Work In Progress

Open Tasks On 04/20/2016, 09:54:19

Open Claim Release

Task Title	Creat...	Created...	Due Date	Status	Priority
Arch/Recds - Hire an Employee - Thir...	04/20/20...	Workflow...	04/19/20...	Ready	Medium

10 25 50

05

Actions ready for review are listed in most recent at top to oldest at bottom by default.

Click on a column to sort a different way.

Click on **the first line** to open it for review.

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Hire an Employee

Check Send Save Draft Back to Author Reject Form Utilities

Requested Status For This Employee

* New Hire Position: 40019901 Cmt Sv I Position End Date: 12/31/9999
Position Type: 060 Casual
Job No: 30000589 Cmt Sv I
Over Under Later - Job: 30000013 Office Support Specialist III
Personnel area: 1100 City Auditor
Employee group: Regular Regular
Validate WS
* Work Schedule Rule: MF 0900-1700
Weekly working hours: 36.25
Pers. Sub Area: DCTU-AFSCI DCTU-AFSCME
Emp. Sub Group: FT Covered, I FT Covered, Negative
* Capacity Util. Level: 100.00
Pay Scale Area: DT DCTU
Pay scale level: Y2
Next increase: 1

Basic Pay

Reason for Change:
Pay scale type:
Pay Scale Group:
Work hours/period:
Annual salary:

MH700-1500,F700-1330
MF 0900-1700
TH 0700-1730, F 0700-1500
MF 0600-1500
MF 0600-1430
MF 0615-1515
MF 0630-15:00
MF 0630-1530
MF 0645-15:15

Add Row Delete Row

Wage Type	Wage Type L...	Operation Ind...	Amount	Currency	Indirect Valua...	Add to Total...	Number/Unit	Unit Text
0S00	Regular Sala...	<input type="checkbox"/>	2,044.80	USD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	
		<input type="checkbox"/>	0.00		<input type="checkbox"/>	<input type="checkbox"/>	0.00	

Justification for Requested Action

Fill In For Absent Employee:

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As BHR Business Partner Approver, your role is to review forms workflowed to you.

You will either:

- Edit;
- Approve;
- Reject; or
- Send Back to Author.

Additionally, you may add Record or Process notes to the forms you receive (and can review any attached documents).

Note that for you, the Business Partner, many of the fields on the form are open for editing (something not available to Bureau Approvers).

Rejections are effectively "Cancellations" of the action being taken. So if there is a correction to be made, don't reject or withdraw. Instead, make Process Comments and send the form "Back to Author." You can also make necessary changes yourself if appropriate.

Scroll down to review remainder of the form.

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Hire an Employee

Check | Send | Save Draft | Back to Author | Reject | Form Utilities

- Business area of person differs from business area of position
- Personnel subarea of person differs from personnel subarea of position
- Person and position have different employee groups/subgroups - Display Help

Requested Status For This Employee

* New Hire Position: 40019901 | Cmt Sv I | Position End Date: 12/31/9999

Position Type: 060 | Casual

Job No: 30000589 | Cmt Sv I

Over Under Later - Job: 30000013 | Office Support Specialist III

Personnel area: 1100 | City Auditor | Pers. Sub Area: DCTU-AFSCI | DCTU-AFSCME

Employee group: Regular | Regular | Emp. Sub Group: FT Covered, I | FT Covered, Negative

Validate WS

* Work Schedule Rule: MF 0600-1500 | Weekly working hours: 40.00

Basic Pay

Reason for Change: 02 | New Hire/Rehire | * Capacity Util. Level: 100.00

Pay scale type: 01 | Represented | Pay Scale Area: DT | DCTU

Pay Scale Group: SCL02255 | Pay scale level: Y2

Work hours/period: 80.00 | Bi-weekly | Next increase:

Annual salary: 53,164.80 | USD

Add Row | Delete Row

Wage Type	Wage Type L...	Operation Ind...	Amount	Currency	Indirect Valua...	Add to Total...	Number/Unit	Unit Text
0S00	Regular Sala...	<input type="checkbox"/>	2,044.80	USD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	
		<input type="checkbox"/>	0.00		<input type="checkbox"/>	<input type="checkbox"/>	0.00	

07

Review all of the information on all parts of the form.

Compare the information on the form against data in SAP.

Make any necessary edits if appropriate or **Send Back to Author**.

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Hire an Employee

Check Send Save Draft Back to Author Reject Form Utilities

- Business area of person differs from business area of position
- Personnel subarea of person differs from personnel subarea of position
- Person and position have different employee groups/subgroups - Display Help

Regular Salary	0.00
	0.00

Justification for Requested Action

Fill In For Absent Employee:

Pending Recruitment:

Emergency/Natural Disaster:

Train New Employee:

Workload Need:

Others(Update Text in Rec...

Comments

Previous Comments: Bureau Approver
Add comments if needed.

OMPA Forms Initiator

Record Comments: Add any comments, if needed.

Process Comments: Process comments only accompany the forms in the Processes & Forms workflow and are discarded once the data from the forms is saved into SAP.

08

Input any **Record Comments** or **Process Comments**.

REMEMBER

Record Comments become HR Master Data and part of the employee record once this form is approved and saved to SAP. They are official comments that will be kept with the form and maintained in accordance with the records retention schedule.

Process Comments only accompany the forms during the P&F workflow. They are discarded once the data from the forms is saved into SAP.

Please include a date, your initials, and indicate the name of the person the note should go to or was meant for.

Return to the top of the form (scroll up).

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The screenshot shows the 'Hire an Employee' form interface. At the top, there are navigation buttons: 'Save Draft', 'Back to Author', 'Approve', 'Reject', and 'Form Utilities'. Below this is the 'Attachments (0)' section, which is highlighted with a red box. Inside this section, there is a dropdown for 'Attachment Type' set to 'General Attachments', a text field for '* Path:' with a 'Browse...' button next to it (also highlighted with a red box), and an 'Attach' button. Below the Attachments section is the 'Hire an Employee (US)' section. Under 'New Hire', there are fields for 'Reason Code' (New Employee), 'Process Reference Number' (00000000314), 'Pers. Number' (01009582), 'Employee Name' (Tiberius Caesar), 'Begin Date' (04/19/2016), and 'Assignment End Date' (04/19/2017). The 'Requested Action(s) - Check all that Apply' section includes 'Type of Appointment' (radio buttons for Temporary HR 3.03, Casual Other HR 3.03, PERS Retiree HR 3.06, and Recruitment/Other HR 3.03), 'Organizational Management Actions' (checkboxes for Under/Over/Lateral Fill H... and Double Fill HR 3.03), and 'Hiring Incentives' (checkboxes for Appointment above entry rate HR 8.04, Vacation Credit up to 40 hours HR 3.01, and Vacation accrual date adjustment HR...). The 'Requested Status For This Employee' section includes 'New Hire Position' (40019901), 'Cmt Sv I', 'Position End Date' (12/31/9999), 'Position Type' (060), and 'Casual'.

09

If you have any attachments, make sure to do that before you send. Attachments can be done at any time and can only be documents in PDF format.

To attach a form, click on the arrow next to Attachments.

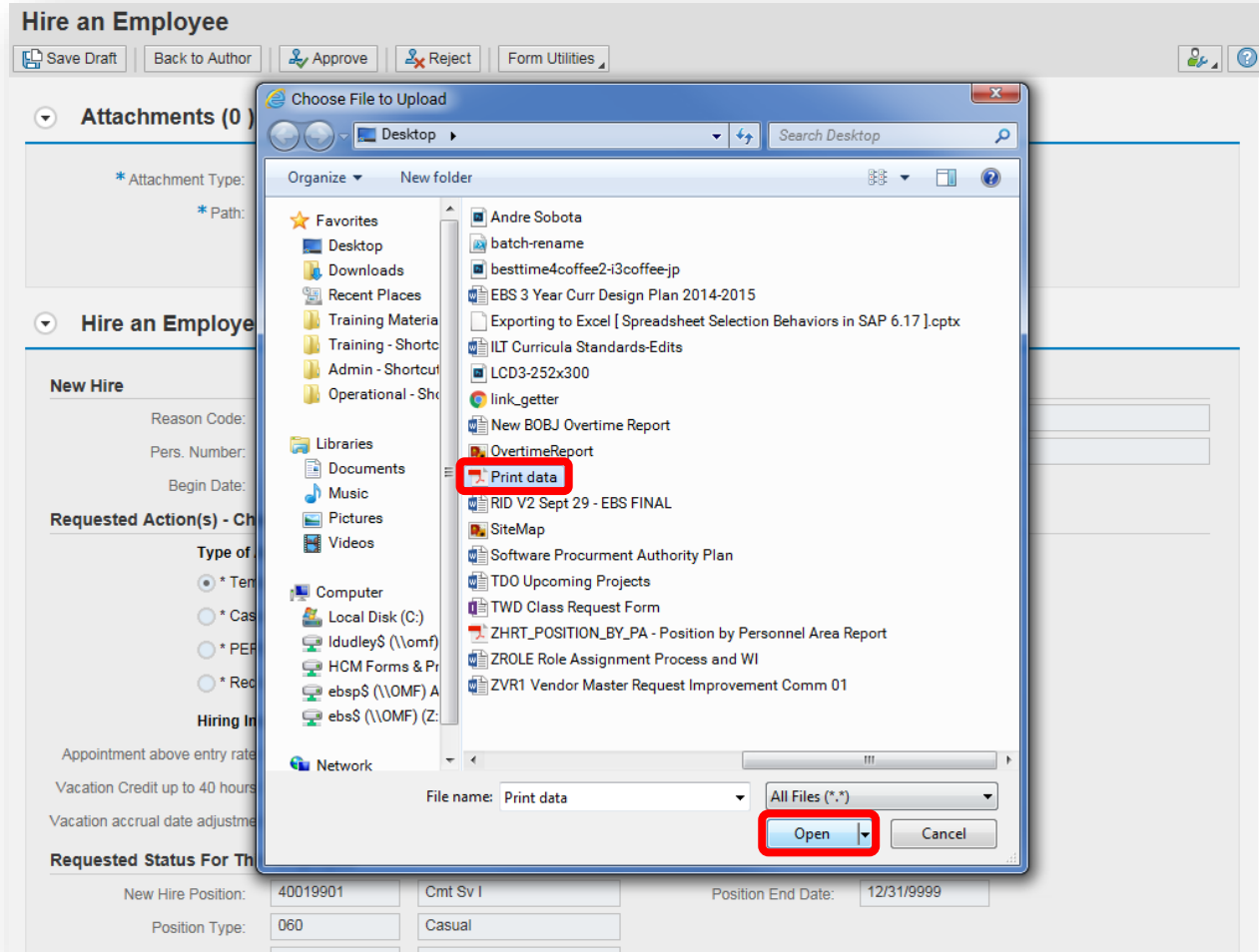
With the Attachments pane open, click on **Browse**.

A pop-up file explorer window will appear.

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In the file explorer window, locate the file you want to attach to the form.

Click **Open**.

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Hire an Employee

Save Draft | Back to Author | Approve | Reject | Form Utilities

Attachments (0)

* Attachment Type: General Attachments

* Path: C:\Users\ldudley\Desktop\Print data.P | Browse...

Attach

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After the file is selected, click **Attach** to upload and attach the file to the form.

Hire an Employee

Save Draft | Back to Author | Approve | Reject | Form Utilities

Attachments (1)

* Attachment Type: General Attachments

* Path: | Browse...

Attach

General Attachments [Trash Can Icon]

Note that after doing this, you will see **General Attachments** and a **Trash Can** icon.

To view the uploaded document click **General Attachments**. To delete the uploaded document click the **Trash Can** icon.

Click the arrow to the left of the Attachments header to close the Attachments pane.

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There are several buttons at the top of the form.

Cancel stops the process and eliminates any work that has been done.

Save Draft also does as you'd expect. It saves a draft of the form, preserving your work up to this point, and puts the form in your **Work In Progress** swim lane so you can easily retrieve it in the future.

Form Utilities allows you to create a PDF of the form to email, save, or print. As well as view a history of who has processed that form.

Back to Author sends the form back to the last person in the workflow who had the ability to edit the form.

Reject effectively cancels the form.

Run a **Check** on the form.

Hire an Employee

Business area of person differs from business area of position
 Personnel subarea of person differs from personnel subarea of position
 Person and position have different employee groups/subgroups - [Display Help](#)

Attachments (1)

Hire an Employee (US)

New Hire

* Reason Code: Process Reference Number:
Pers. Number: Employee Name:
Begin Date: Assignment End Date:

Requested Action(s) - Check all that Apply

Type of Appointment

* Temporary HR 3.03
 * Casual Other HR 3.03
 * PERS Retiree HR 3.06
 * Recruitment/Other HR 3.03

Organizational Management Actions

* Under/Over/Lateral Fill H...
* Double Fill HR 3.03:

Hiring Incentives

Appointment above entry rate HR 8.04:
Vacation Credit up to 40 hours HR 3.01:
Vacation accrual date adjustment HR...:

Requested Status For This Employee

* New Hire Position: Position End Date:
Position Type:
Job No:
Over Under Later - Job:

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The screenshot shows the 'Hire an Employee' form interface. At the top, there are buttons for 'Check', 'Send', 'Save Draft', 'Back to Author', 'Reject', and 'Form Utilities'. The 'Send' button is highlighted with a red box. Below the buttons, there are several green checkmarks indicating successful validation steps: 'Business area of person differs from business area of position', 'Personnel subarea of person differs from personnel subarea of position', 'Person and position have different employee groups/subgroups - Display Help', and 'Review Without Errors'. The form fields include 'Reason Code' (New Employee), 'Pers. Number' (01009582), and 'Begin Date' (04/19/2016). A section titled 'Requested Action(s) - Check all that Apply' is visible. A yellow callout box with a green background and black text explains: 'The Yellow Exclamation Point signs are always present to notify you that any fields that show auto-generated data are not checked when the form is run (or other messages). A Red Exclamation Point indicates a problem and the problem field will be flagged for you to see. Click on the error message to go directly to the problem field. Correct the error and recheck. The Green Check will display if your form has no errors (or if a specific field being checked has correct input data).' The 'Send' button is also highlighted with a red box.

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If you get a green check, click **Send**.

Once you click Send, you will receive a confirmation messages with a **Process Reference Number**. You can take note of this number to check on its progress later using the Process Browser.

The form is sent next to the BHR Services Team for review.

The screenshot shows a 'Step Completed' message box. It contains a green checkmark and the text: 'Data sent (process reference number: 000000000314)'. There is an 'Options' dropdown menu in the top right corner and a help icon in the bottom right corner.

To learn how to search for any submitted form in the Process Browser review the Work Instruction, **Using the Process Browser [OM/PA Initiator, Approver, or BHR Services Team]**.

– END –