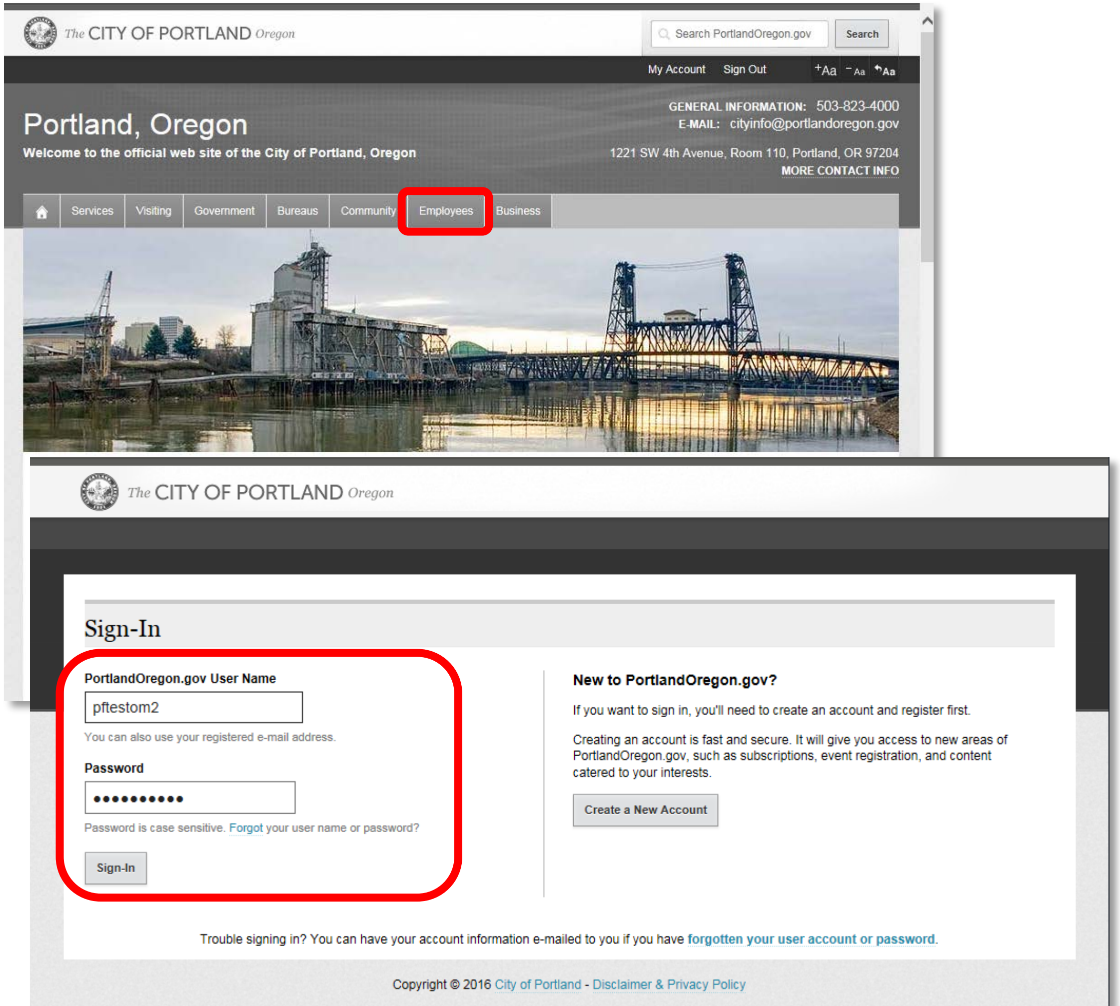
Business Process Notes

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.



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.

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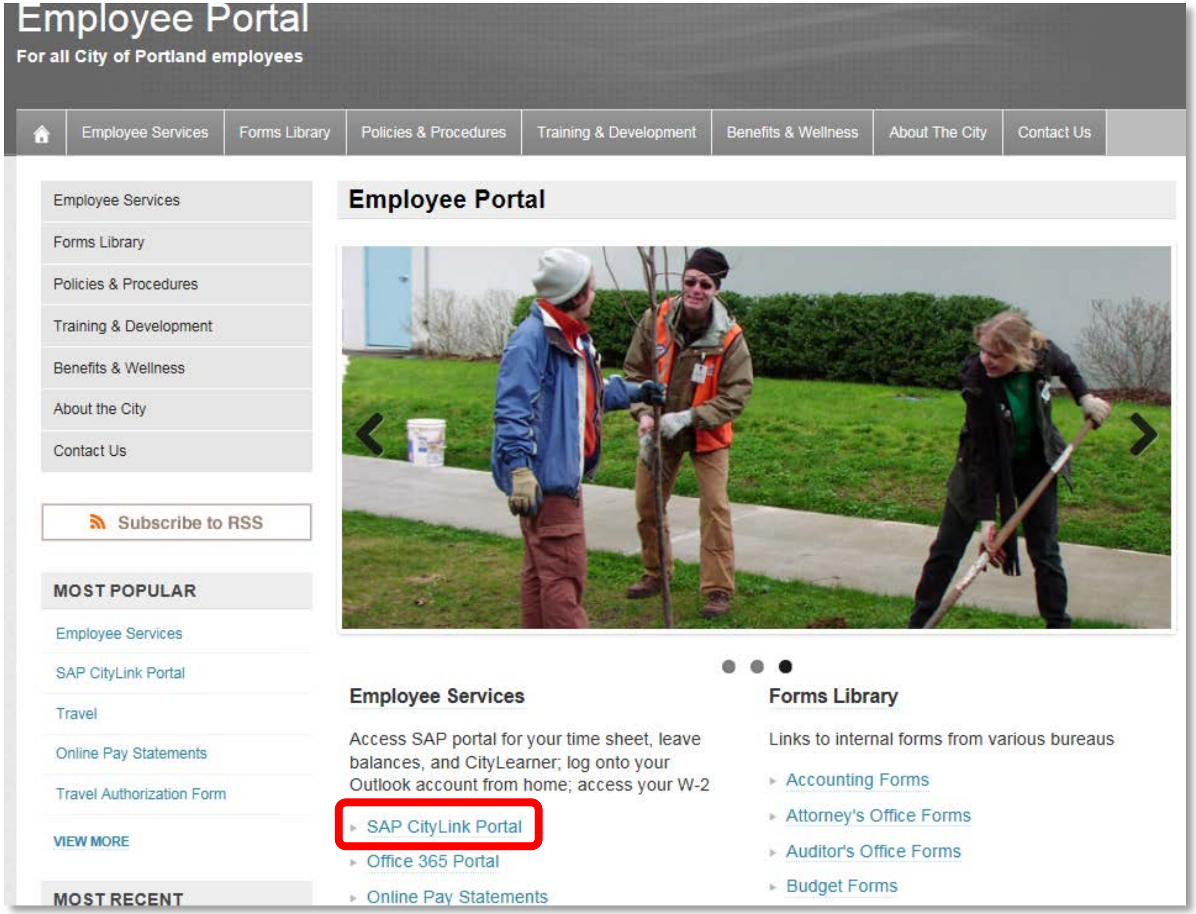
01 BEGIN

Login to your PortlandOregon.gov account.

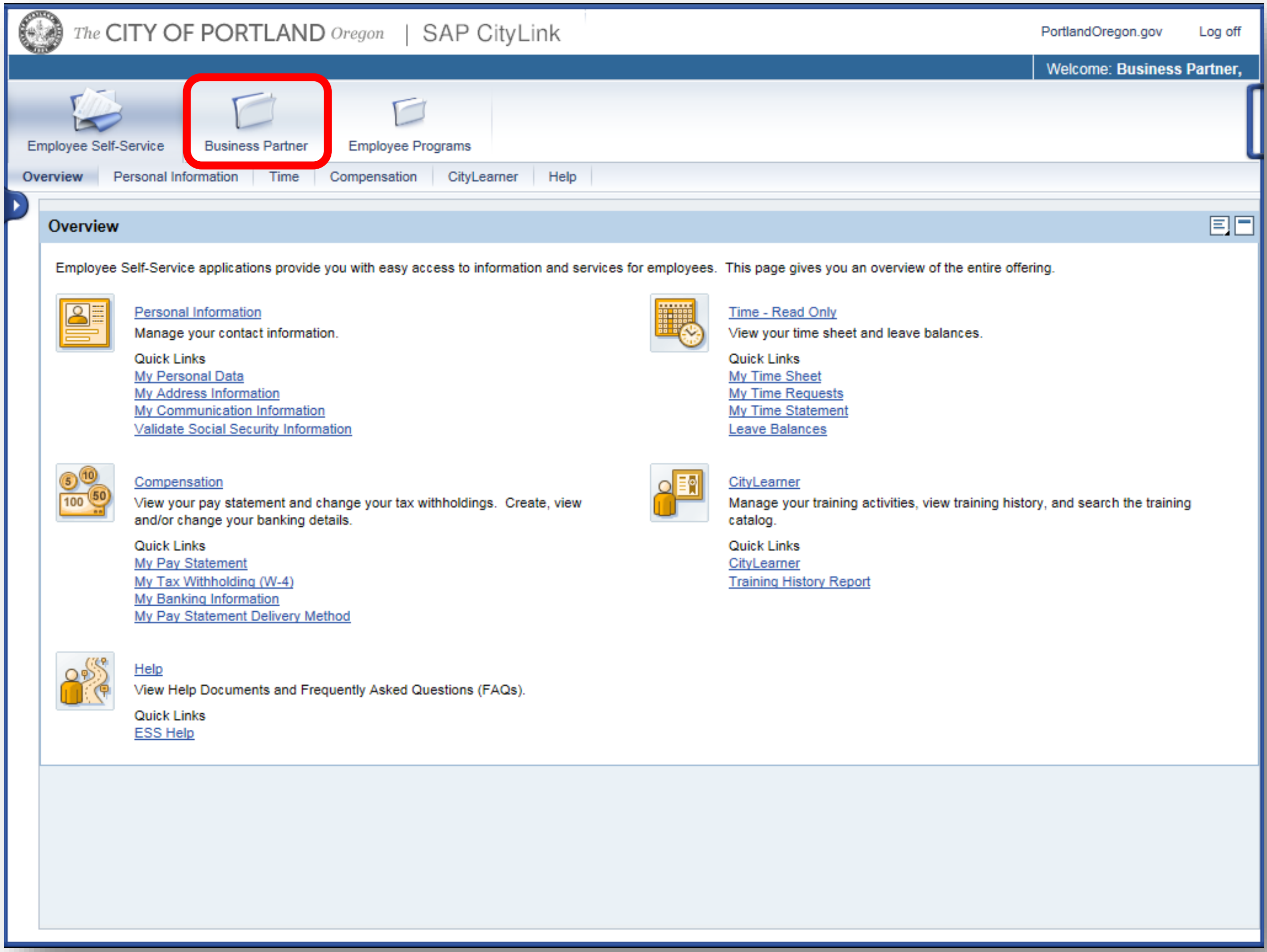


02

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

PA Actions Review [PA HR Business Partner Approver]

Module: PA, Processes & Forms Application // **Process:** Bureau approver reviews actions submitted by OBPAs for processing.
PA Form Used: Personnel Action Request Form (PAR)

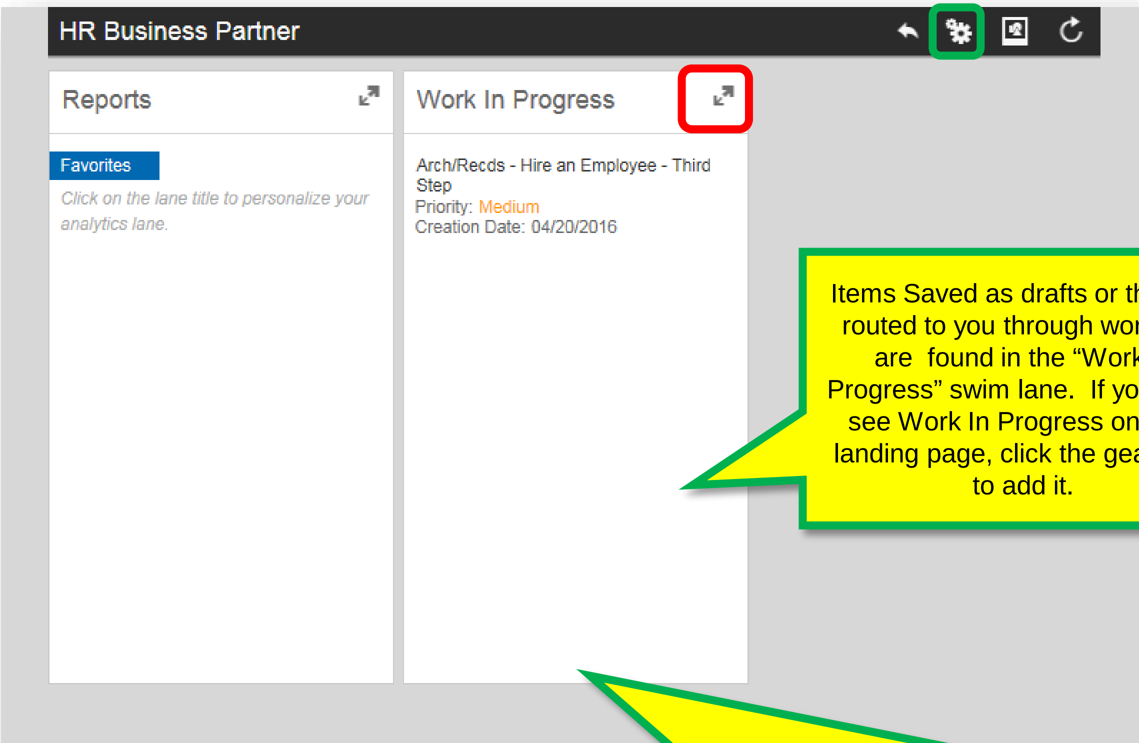


03

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

04

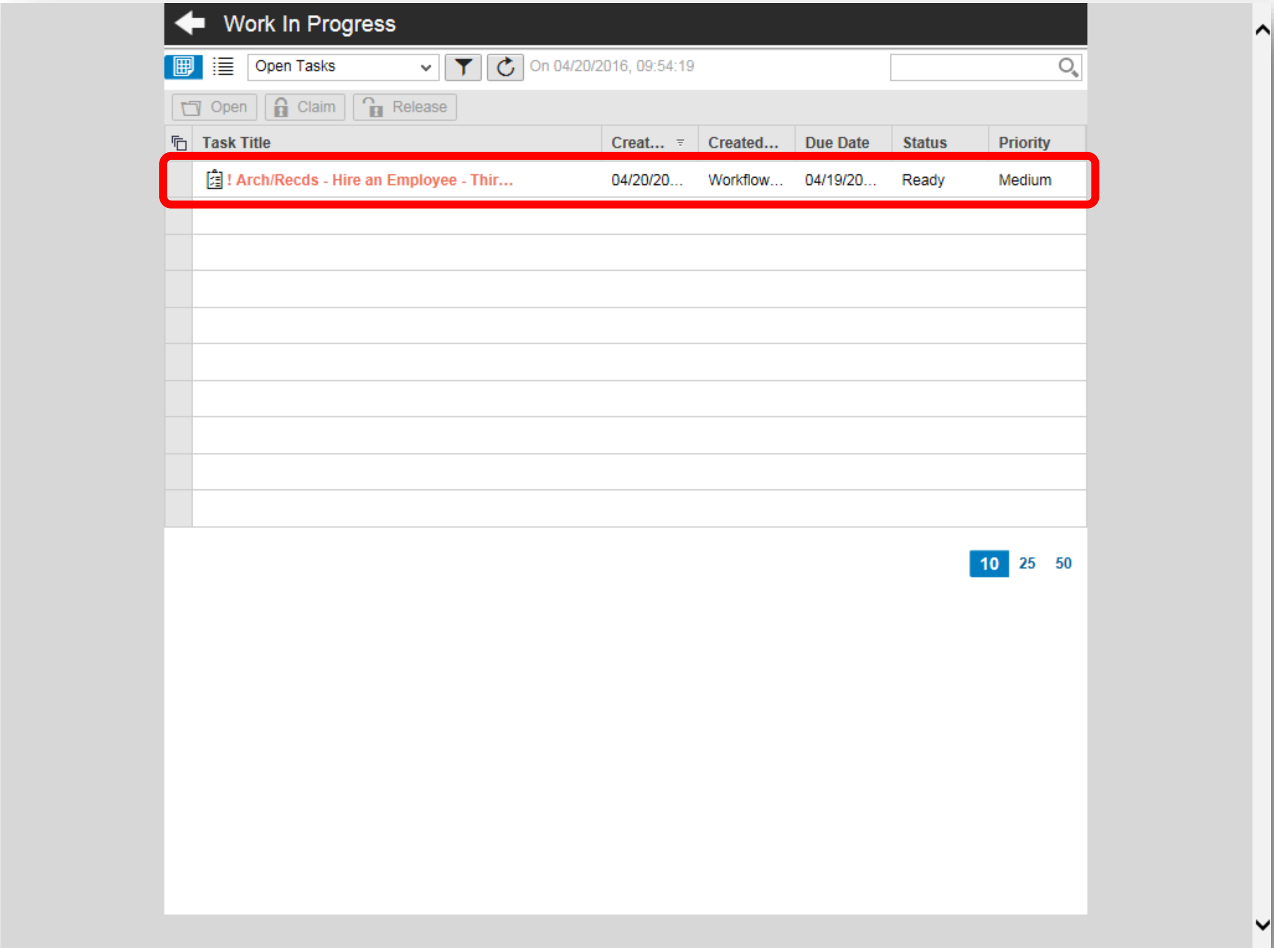
This is your "Landing Page" for Processes & Forms. From here you run reports, continue with saved work, or process items sent to you through workflow. Click on the **Work In Progress expander button**.



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.

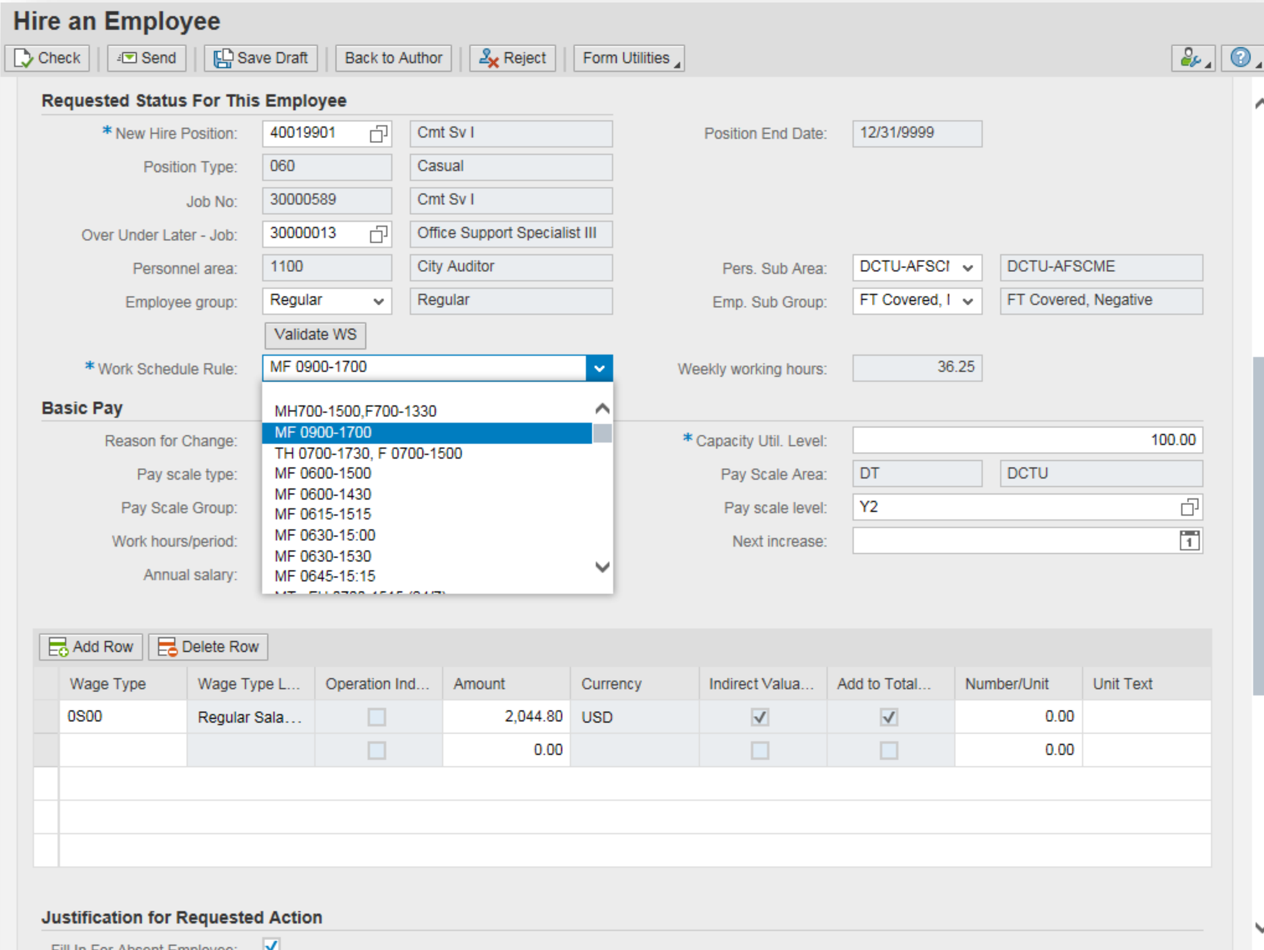


05

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.



06

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

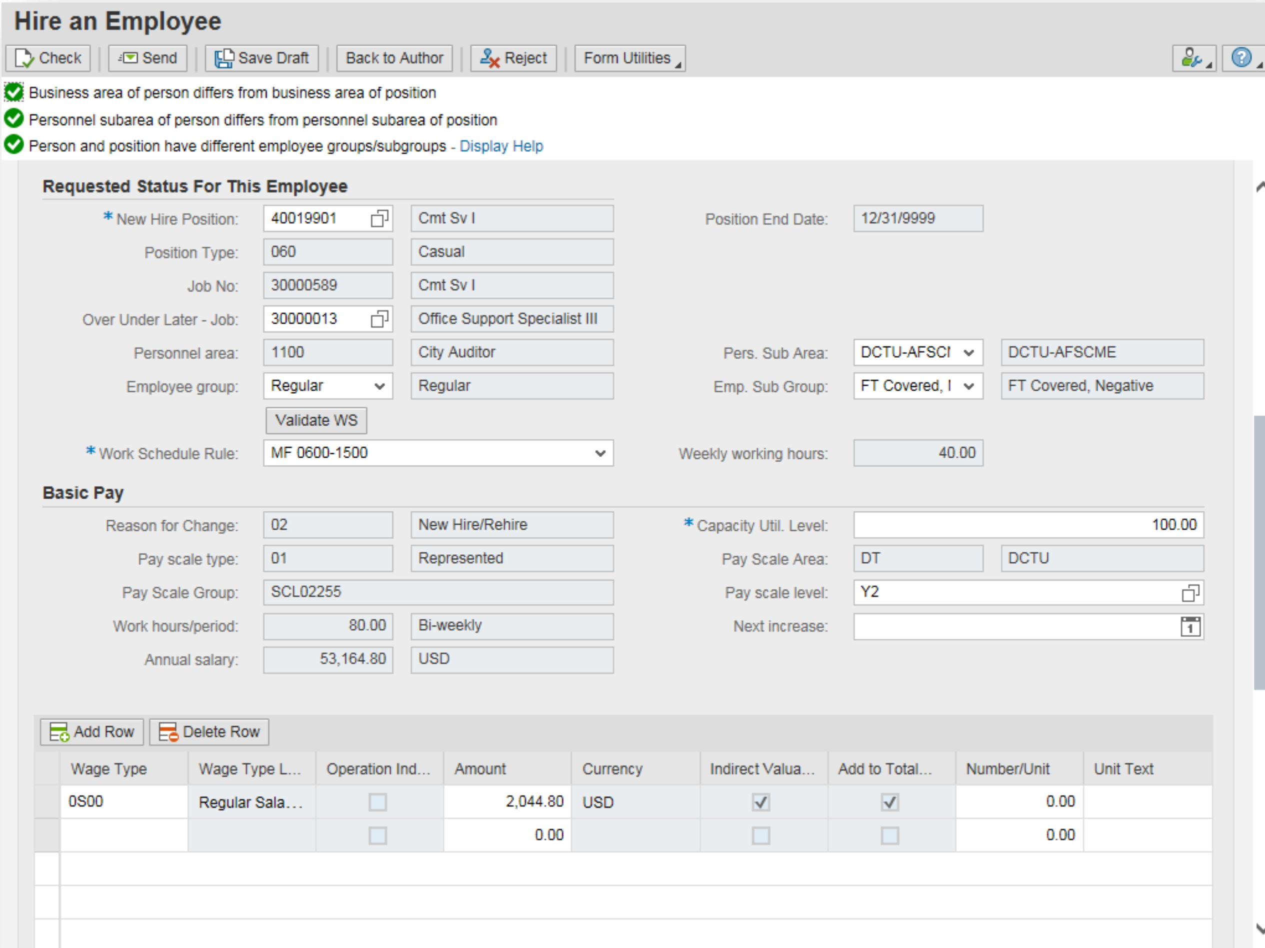
You will either:
a) Edit;
b) Approve;
c) Reject; or
d) Send Back to Author.

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.

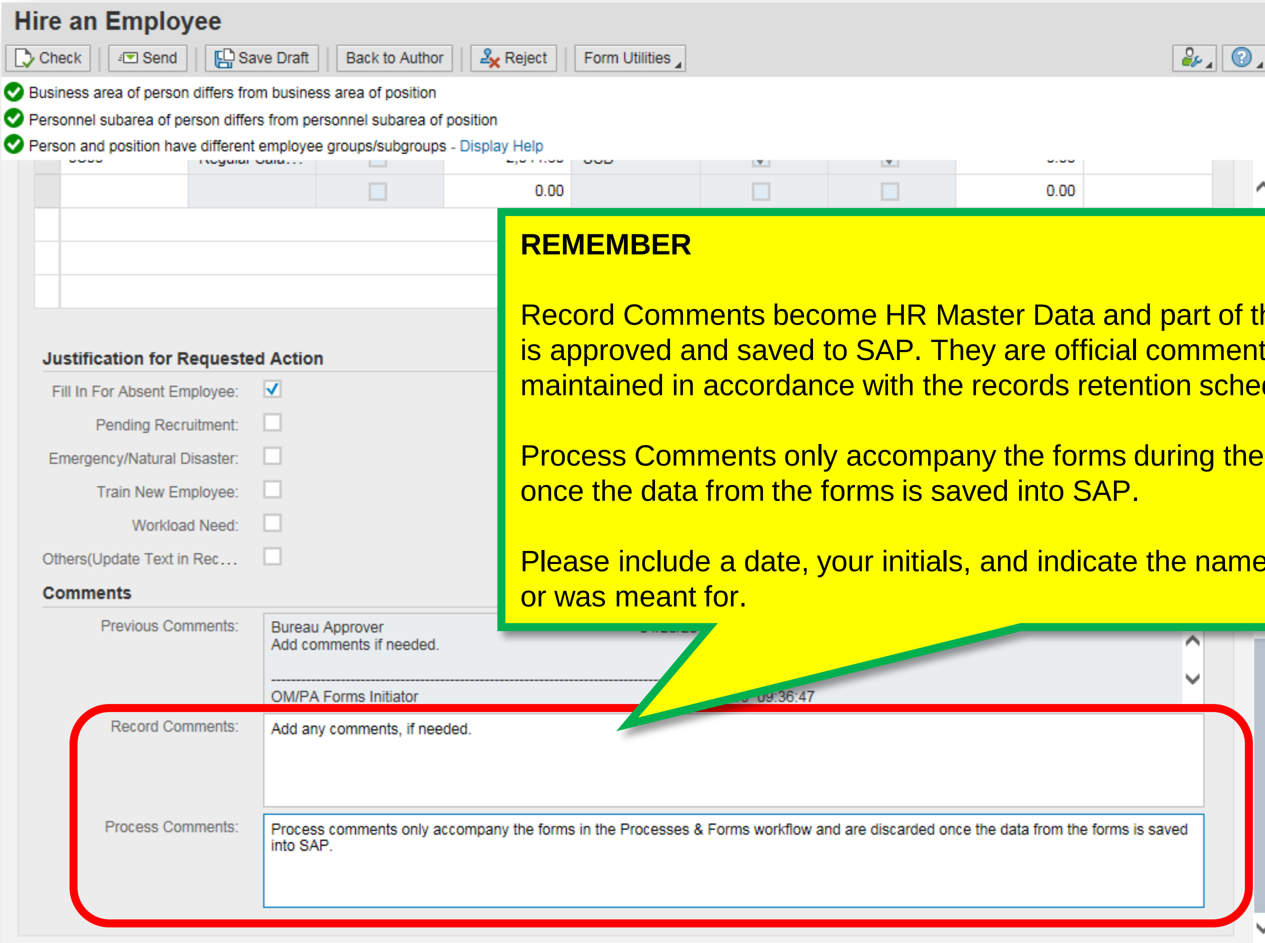


07

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**.



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.

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

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

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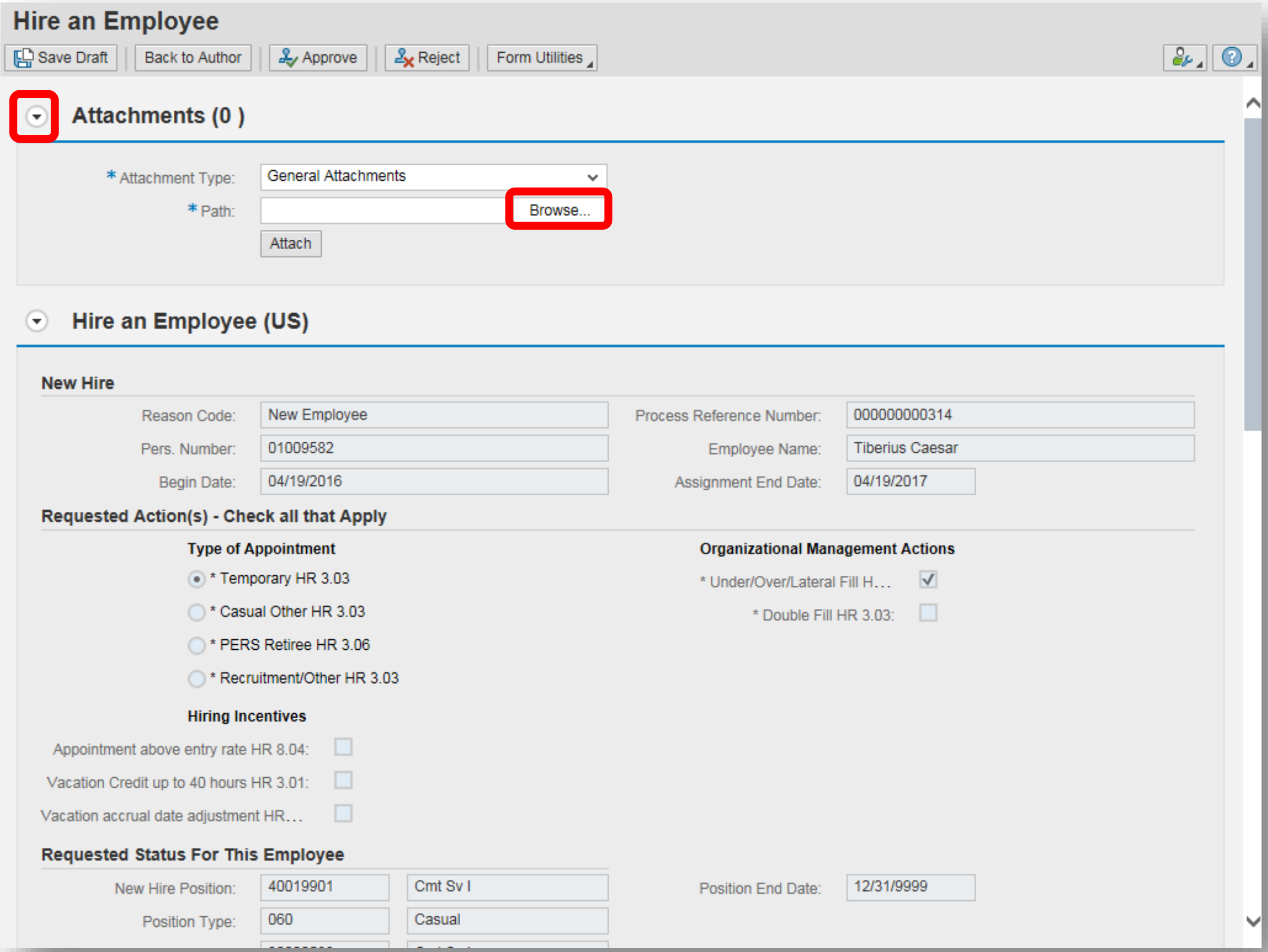


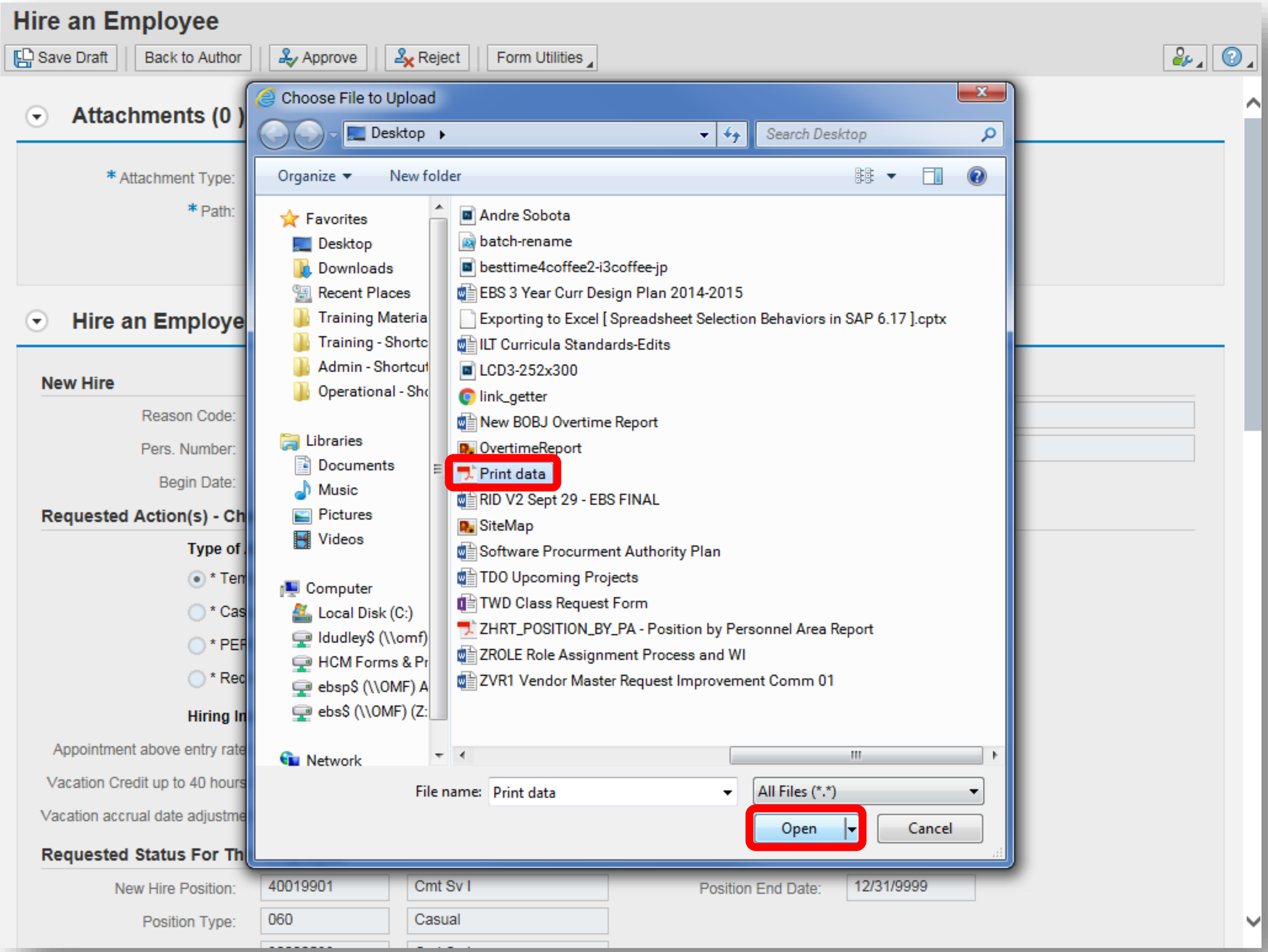
09

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**.

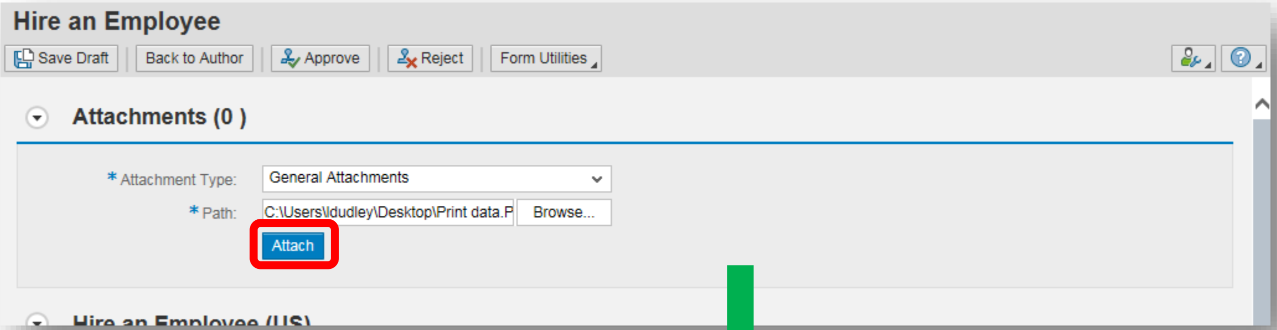
A pop-up file explorer window will appear.



10

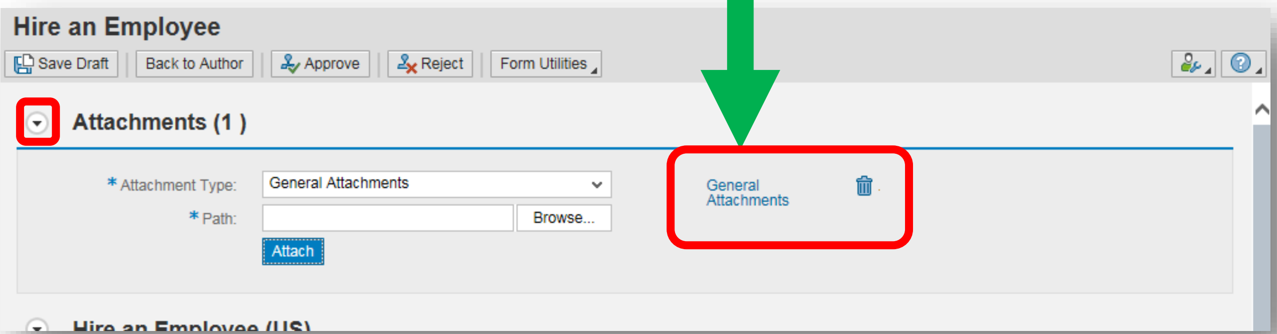
In the file explorer window, locate the file you want to attach to the form.

Click **Open**.



11

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



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.

PA Actions Review [PA HR Business Partner Approver]

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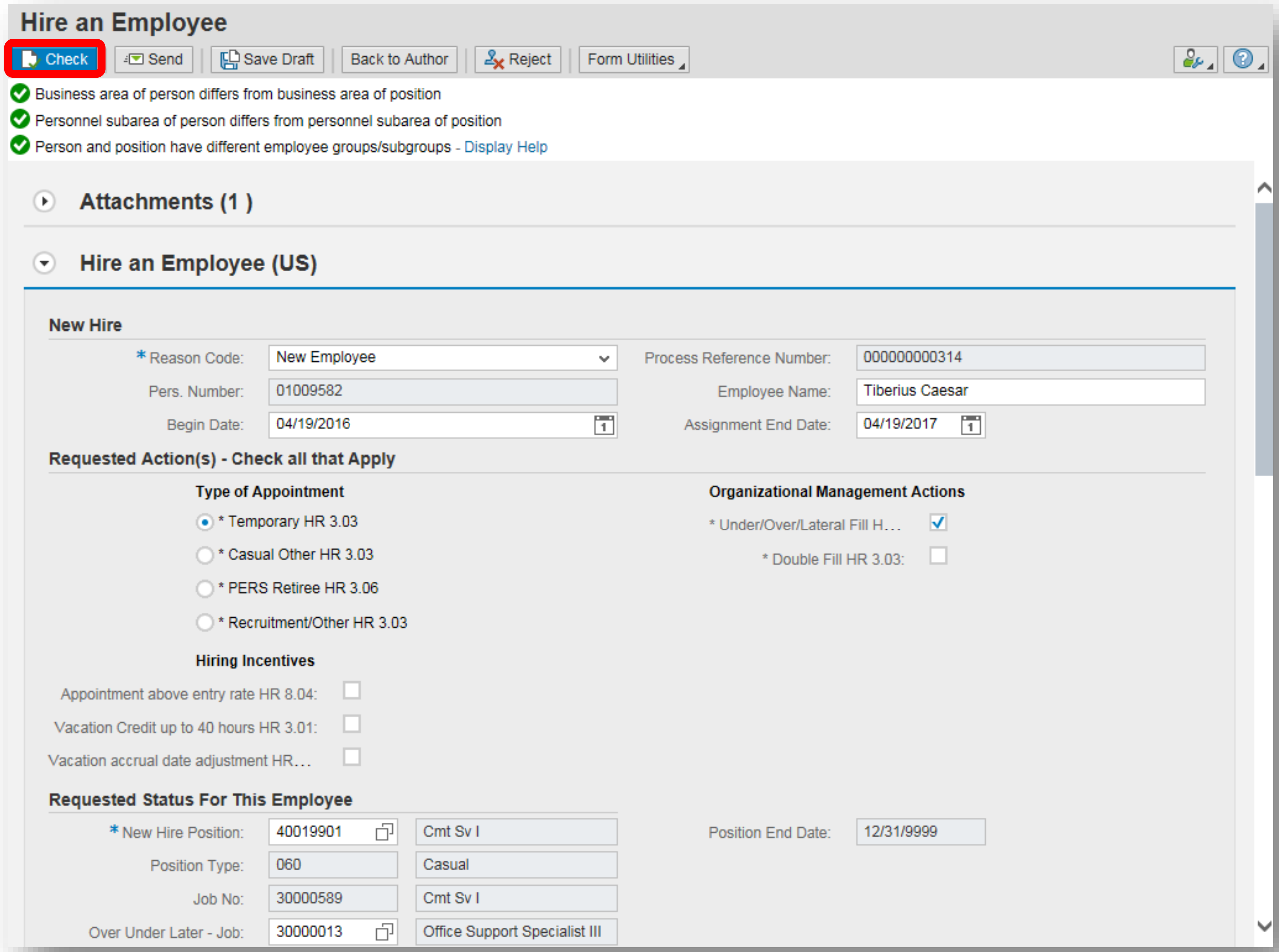


12

There are several buttons at the top of the form.

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

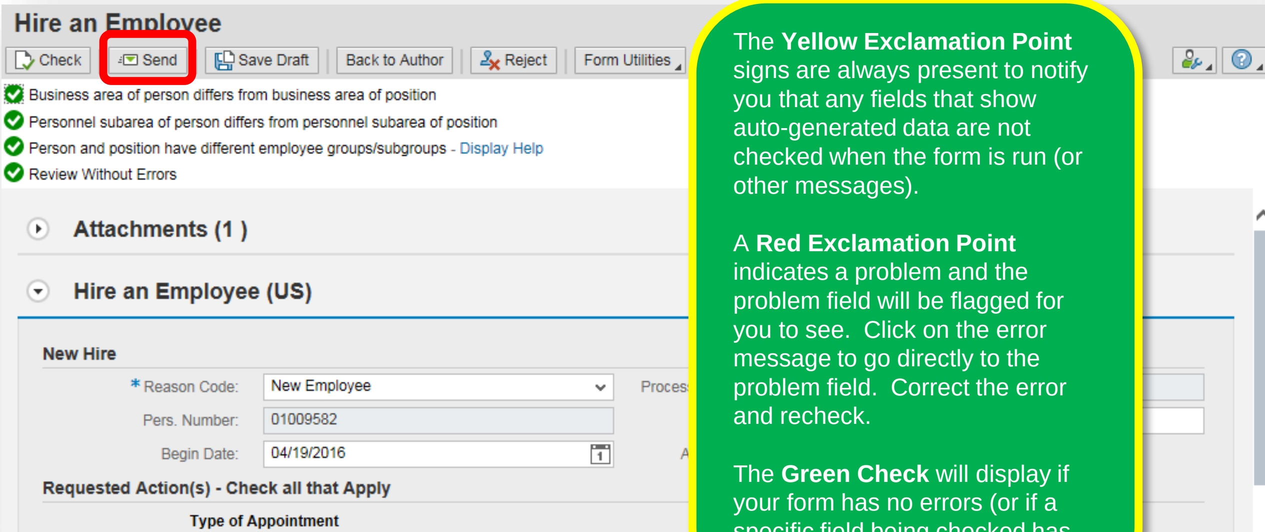
Save Draft also does as you'd expect. It saves a draft of the form, preserving your work up to this point, and puts the form in your **Work In Progress** swim lane so you can easily retrieve it in the future.

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.

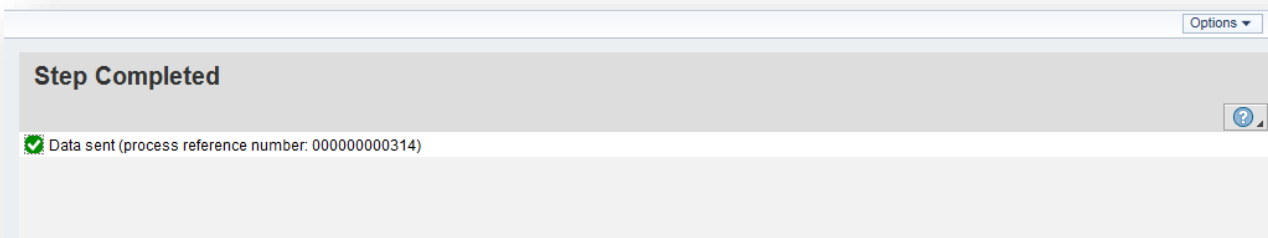
Run a **Check** on the form.



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).



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]**.

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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.

– END –