

# WELCOME TO THE OM-PA USER GROUP

**JULY 7, 2016**



# Agenda

- HCM Processes and Forms Project Update
- SAP EE Group and EE Subgroup
- P&F FAQs
- Questions?



# SAP Employee Group and Employee Sub-Group



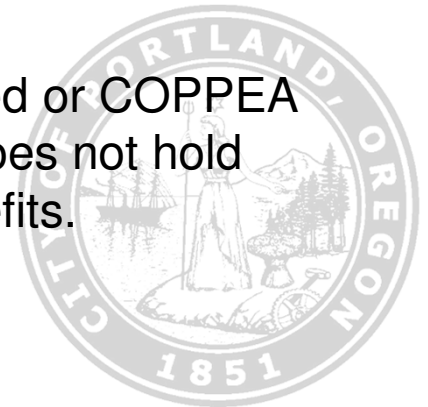
# Employee Group

**Regular** – Permanently appointed to an authorized permanent/limited term position via civil service process in accordance with the HR Administrative Rules and/or applicable collective bargaining agreement. Eligible for City-paid benefits. Maintains layoff rights.

**Casual** – Appointed as a seasonal/casual employee to an unbudgeted position in Seasonal/Casual Classifications. Limited working hours and does not hold permanent status in the classification.

**Casual Other** – Appointed as a seasonal/casual employee to an unbudgeted position in a Classified or Exempt from Charter Classification. Limited working hours and does not hold permanent status in the classification.

**Limited Duration** – Appointed to an authorized Non-Represented or COPPEA (initial hire only) limited term position via civil service process. Does not hold permanent status in the classification. Eligible for City-paid benefits.

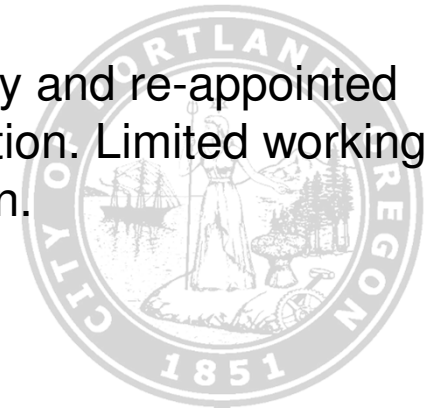


# Employee Group

**Temp (Budgeted)** – Temporary appointed to an authorized permanent or limited term position. Does not hold permanent status in any classification. Full-time Temp (Budgeted) employees are eligible for City-paid benefits. Note: A Regular employee temporary appointed must be coded as Regular to continue to accrual seniority in the base class.

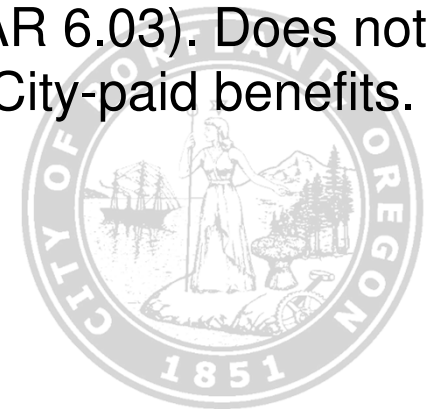
**Working Retiree – Benefits Eligible** – Retired from the City and re-appointed to an authorized permanent or limited term position. Limited working hours and does not hold permanent status in the classification. Eligible for City paid health insurance benefits at the appropriate employer contribution for a maximum of six months from the date of retirement.

**Working Retiree - Non-Benefits Eligible** - Retired from the City and re-appointed to an authorized permanent, limited term or unbudgeted position. Limited working hours and does not hold permanent status in the classification.



# Employee Group

- At-Will** – Appointed to an authorized permanent or limited term position. Serves at will. Does not hold permanent status in the classification. Eligible for City-paid benefits. Refer to the [Current List of Classifications Exempt from Classified Service](#) posted on the BHR Website.
- Elected Officials** – Elected to a full-time position. Does not hold permanent status in the classification. Exempt from vacation & sick leave accruals. Eligible for City-paid benefits.
- Executive** – Bureau Directors and specific premium classifications who receive additional vacation accrual carry over (per HRAR 6.03). Does not hold permanent status in the classification. Eligible for City-paid benefits.



# Employee Group - Casual

A Casual appointment in Seasonal/Casual Classifications is excluded from the Required Approval process. Below are the casual classifications applicable to this rule:

Job Number

Job Title

30000015

Clerical Trainee

30000067

Staff Assistant

30000221

Engineering Trainee

30000222

Surveying Aide Trainee

30000254

Recreation Leader (PT Seasonal)

30000294

Sports Official

30000255

Parks Activities Specialist

30000295

Recreation Assistant

30000296

Public Safety Aide

30000791

Fire Fighter Trainee (hire made via civil service process)

30000589

Community Services Aide I

30000590

Community Services Aide II

30000074

Seasonal Maintenance Worker (SMW)

30002159

Seasonal Park Ranger (DCTU – Laborers)



# Employee Group - Casual Hours Restriction

## Casual Non-Represented Employees

HRAR 3.03 Casual/Casual Other appointments are limited to 1400 hours per calendar year.

## Casual - Seasonal Maintenance Workers

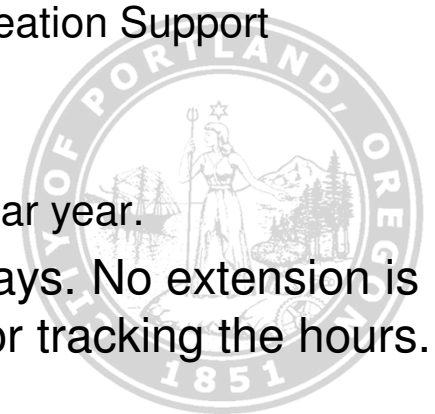
1.2 A Seasonal Maintenance Worker may be employed for a limited duration for a maximum number of hours per calendar year as defined by the City's Human Resources Administrative Rules. Currently the maximum number of hours is 1400. Should the City's Human Resources Administrative Rules change, the parties agree to meet pursuant to ORS 243.698 to bargain over the impact of the change.

## Casual – Recreation Support Employees

1.1.5 For the calendar year 2016 the City may employ up to 34 Recreation Support Persons for up to 1600 hours.

## Casual – Seasonal Park Rangers

1.1.5 Seasonal Park Rangers may work up to 1400 hours per calendar year. Hours limit includes all hours worked plus sick time and holidays. No extension is needed for a casual appointment. Bureaus are responsible for tracking the hours.





# Employee Subgroup

- **Full-Time – Negative** time entry and **Part-Time – Positive** time entry

Exceptions:

- All FT and PT Casual, Casual Other, and Working Retiree employees are Positive time entries.
- Some FT Recreation employees are Positive time entries

- **Overtime Eligibility for Represented and Non-represented Employees:**

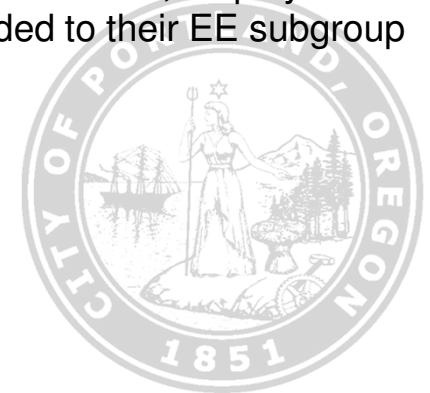
Employee overtime eligibility is generally determined by two main components: the bargaining unit representing an employee's classification, and the FLSA (Fair Labor Standards Act) status of the employee's position.

- Per FLSA standard, each classification is designed as **C/Y – OT Eligible** or **E/N – OT Exempt**.
- Each bargaining unit have different provisions regarding overtime pay; therefore, employees hired into E/N Represented Classifications must have an OT code added to their EE subgroup for SAP to calculate their contract OT.

For example:

Non-Rep: PT Covered, Positive or FT Exempt, Negative

Represented: PT Covered, Positive or FT Exempt OT, Negative



# Processes & Forms FAQs



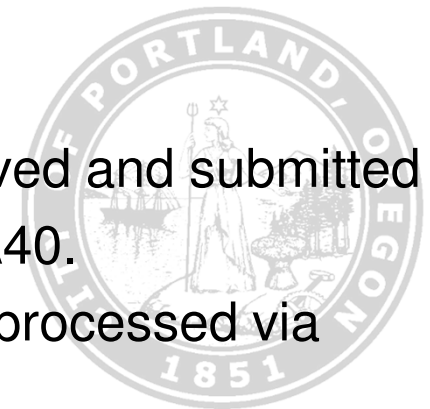
# New P&F Actions

Effective June 1st, Bureaus should plan to use the new forms for the following actions even if there are no additional approvals needed.

- Employee to Retiree
- Extension of Temporary Appointment
- New Hire
- Regular Action
- Rehire
- Status Change
- Temporary/Limited Duration Appointment

Any paperwork (PAR and Referral, etc.) already approved and submitted before P&F went live, should complete the action in PA40.

**Starting July 14<sup>th</sup>, 2016**, the above actions should be processed via P&F unless an exception has been granted by BHR.



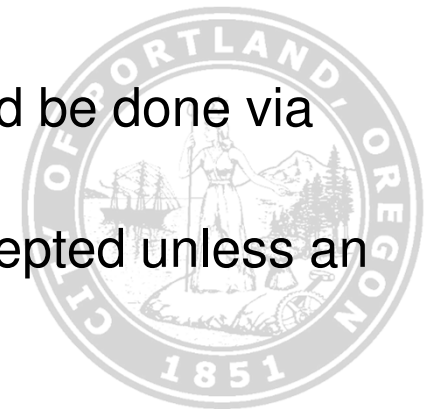
# When to use the PAR?

The paper PAR is still used for the following actions:

- Interbureau Transfers
- To correct the pay or vacation accrual amount after the initial form has already been processed via P&F into SAP and there has been an exception needing approvals
- Extension requests for employees in expired positions
- Employees with Restricted Return separation codes

Except for the actions listed above, all new requests should be done via P&F.

**Starting July 14<sup>th</sup>, 2016**, paper PAR will no longer be accepted unless an exception has been granted by BHR.



# PA40 Actions

Bureaus will continue to use PA40 to process the following actions:

- Separation
- Retirement
- Leave of Absence-Unpaid
- Leave of Absence-Paid
- Return from Leave
- Layoff
- End of Temp Assgn/Return to Previous Assgn
- Change in Pay



# Appointing a Casual Employee

Casual appointments in Seasonal/Casual Classifications do not require approvals in Processes and Forms Use the Requested Action(s) type “**Recruitment/Other**”.

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

**NO** Organizational Management Actions can be chosen and  
**NO** Hiring Incentives can be chosen.

The P&F workflow starts with the PA Initiator-short form (1<sup>st</sup> level) moves to the OBPA-long form (5<sup>th</sup> level) and then moves to HR & Payroll Services (6<sup>th</sup> level)



# How to use the form to validate

- Always click on search button  to find and choose from the applicable value. Complete all fields (left to right, top to bottom) on the form before clicking on the CHECK button to validate.
- Position vacancy will not be validated when manually entered. If the vacancy needed is not showing up on the search, check the begin date of the form.
- To use the employee's current position, select the  Using Current Position:  box under Organizational Management Actions list.
- When a change is made to the **Begin Date**, **Requested Action(s)**, and/or **Requested Status for This Employee** section, always to click the  button to refresh the work schedule and basic pay data
- Employee in Pay Scale: select the pay rate from the Pay scale level

Pay scale level:

- Employee in Pay Grade: enter the pay rate in the Amount field

Wage Type	Wage Type Lon...	Operation Indic...	Amount
OS00	Regular Salary...	<input type="checkbox"/>	2,144.00

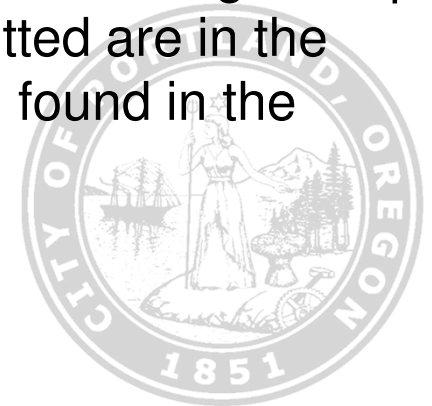


# WIP Swim Lane

**Q: Why can't I see forms submitted by the other OM/PA Initiators in my Bureau in the Work in Progress (WIP) swim lane?**

**A:** The (WIP) swim lane is designed to show work that needs action by you and others in your role. Forms that have been sent or approved go to the next level and will only be seen by you if you (and others in the bureau with your same role) need to perform work on that form.

For example: return to author situations or “long-form” processing at step five. To see where forms that have already been submitted are in the approval process, use the Process Browser application found in the Reports swim lane.





# How to use the Process Browser

Review handout



# Substitution

**Q: I am leaving on vacation soon and was told I need to setup a substitution. What is a substitution, when should I set one up and how do I do it?**

**A:** A P&F substitution allows you to delegate who in your bureau will receive notifications and process forms on your behalf. Substitution is only needed at the Bureau Approver and HR Business Partner levels. There are no substitutions needed for Initiators because initiators are responsible for starting the process. You can only substitute someone who has been designated as a “Back-Up” for your bureau. Keep in mind, substitutions should be set up *before* you leave for vacation. Forms only go to substitutes once the substitution has been created. Forms already in the workflow approval process will not go to substitutes and must be forwarded to a substitute by EBS if the substitute was setup after the form was launched. Contact EBS if you have this situation.

# New Hires and Rehires

**Q: I am hiring or rehiring an employee and want to be able to submit a request to BTS for computer access, but I need the SAP user name to do that. Has this process changed?**

**A:** No, the process has not changed. The new hire and rehire form must be processed into SAP to initiate user computer access. Ensure that all hiring paperwork is attached to the form (including Referrals). BHR will make it a priority to process these forms daily.



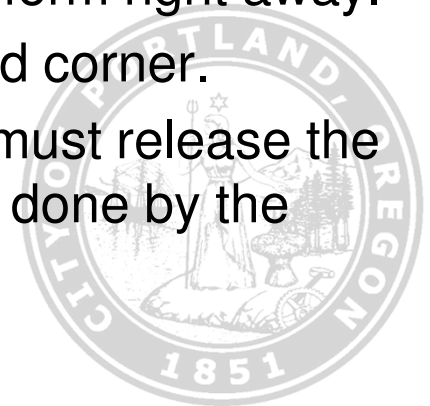
# Complete or Close the Form

**Q: I opened a form to look at it or process it and now it is “stuck” with me and other users can’t open it. I have closed the form so why can’t anyone else open it?**

**A:** Once a form is opened for processing, that processing should occur before the form “times out” after 60 minutes.

We recommend you utilize:

1. “Save as draft” functionality if you cannot process a form right away.
2. Close the form by utilizing the X in the top right hand corner.
3. If the form you were working on has timed out, you must release the form so it can be available for others. This can only be done by the person who originally “claimed” it.



# BHR SAP Resources

Remember to read other **SAP information** in the BHR SAP Resources site.

- You must login to Portland Online
  - Bureau of Human Resources
    - Our Services Tab
      - I want to...View SAP Resources
        - SAP Resources



# Questions?



# OM/PA User Group

**Thank you for coming!**

