



Enter Personnel Action - Layoff (PA40)

Purpose

Use this procedure to layoff an employee.

Trigger

Perform this procedure when an employee is displaced from their current position, severing the employer/employee relationship.

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.



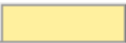

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Procedure

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 such as New Hire, Change In Pay, Temporary Action, Regular Action, Status Change, etc., with 'Layoff' highlighted. At the bottom of the table are navigation arrows.

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



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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  .



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Personnel Number (XXXX) YYYY Entries found

Last name	First na...	Title	Pers.No.
Lee	Jimmie		00100018
Lincoln	Fred		00100039
Macdonald	Elizabeth		00100015
Maddy	Deanna		00100045
Marshall	Matthew		00100073
Martin	Katie		00100032
McGowan	Alexis		00100023
Miracle	Doris		00100024
Moore	John		00100080
Moreno	Theresa		00100044
Newman	Rachel		00100093
Otte	Harvey		00100042
Owens	Ernestine		00100074
Palma	Lorraine		00100017
Pate	Maria		00100010
Raasch	Jose		00100013
Rabago	Dennis		00100019
Rowe	Rita		00100016
Schaub	Theresa		00100027
Seymour	Amy		00100012
Smith	Luis		00100078
Smith	Sarah		00100075
Stubblefield	Steven		00100028
Thacker	Susan		00100020
Torpey	Jana		00100051
Valdez	Valerie		00100117
Vandivier	Sharon		00100040
Vandivier-Browne	Sharon		00100040
Varner	Angie		00100001
Washburn	William		00100003
West	Linda		00100036



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- 6. Select **Valdez Valerie 00100117** list item Valdez Valerie 00100117
- 7. Click **Enter (continue)** button

Personnel Actions

- 8. Click **From** field .
 Enter the "Separation Date" in the **From** field.



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

Field	R/O/C	Description
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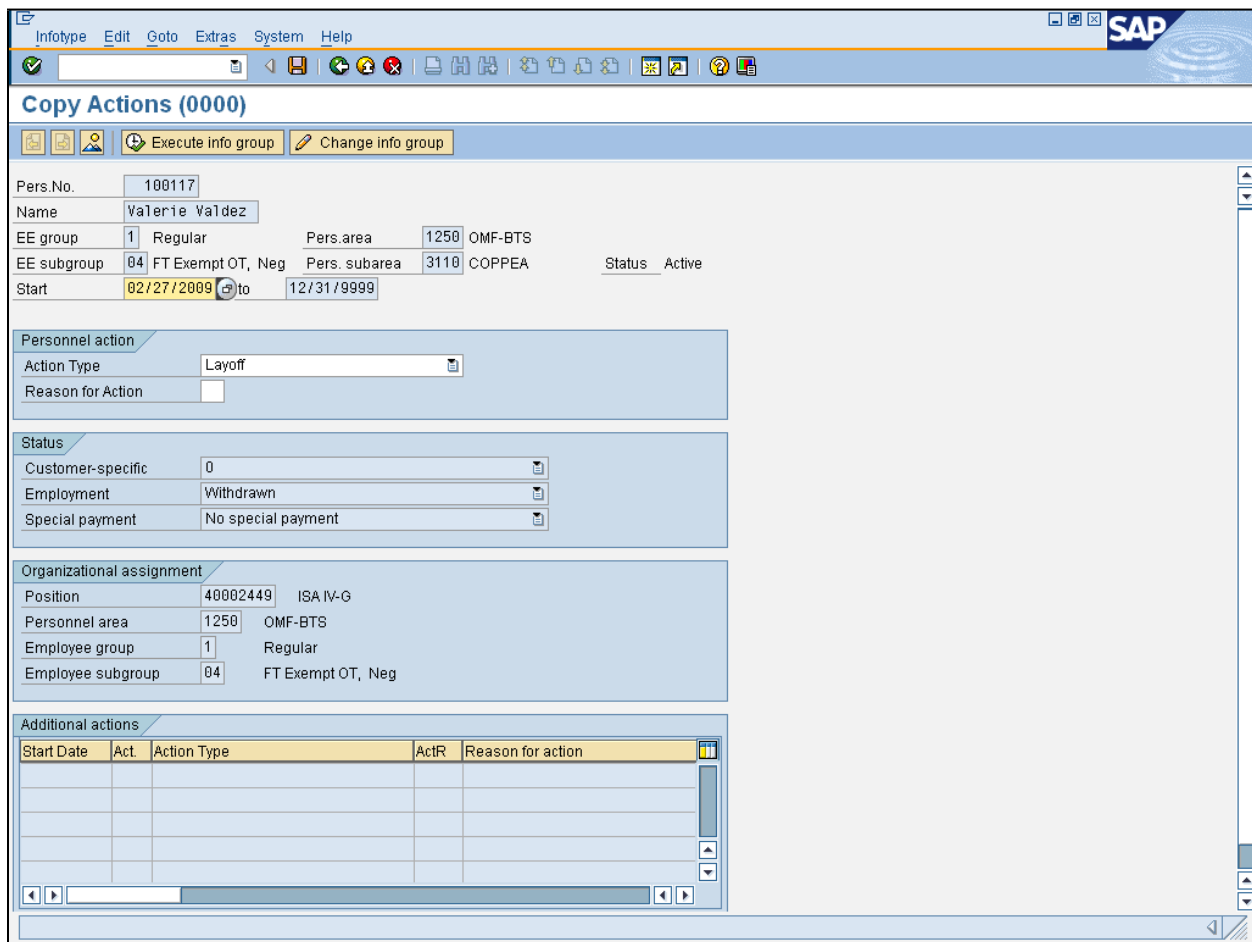


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Field	R/O/C	Description
From	R	Beginning value to be entered when specifying a range. Example: 02/27/09

10. Select **Layoff** list item  .
11. Click **Execute** button  . The *Copy Actions (0000)* screen displays.

Copy Actions (0000)



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

- Personnel Data:** Pers.No. 100117, Name Valerie Valdez, EE group 1 Regular, Pers.area 1250 OMF-BTS, EE subgroup 04 FT Exempt OT, Neg, Pers. subarea 3110 COPPEA, Status Active, Start 02/27/2009 to 12/31/9999.
- Personnel action:** Action Type Layoff, Reason for Action (empty field).
- Status:** Customer-specific 0, Employment Withdrawn, Special payment No special payment.
- Organizational assignment:** Position 40002449 ISA IV-G, Personnel area 1250 OMF-BTS, Employee group 1 Regular, Employee subgroup 04 FT Exempt OT, Neg.
- Additional actions:** A table with columns: Start Date, Act, Action Type, ActR, Reason for action.

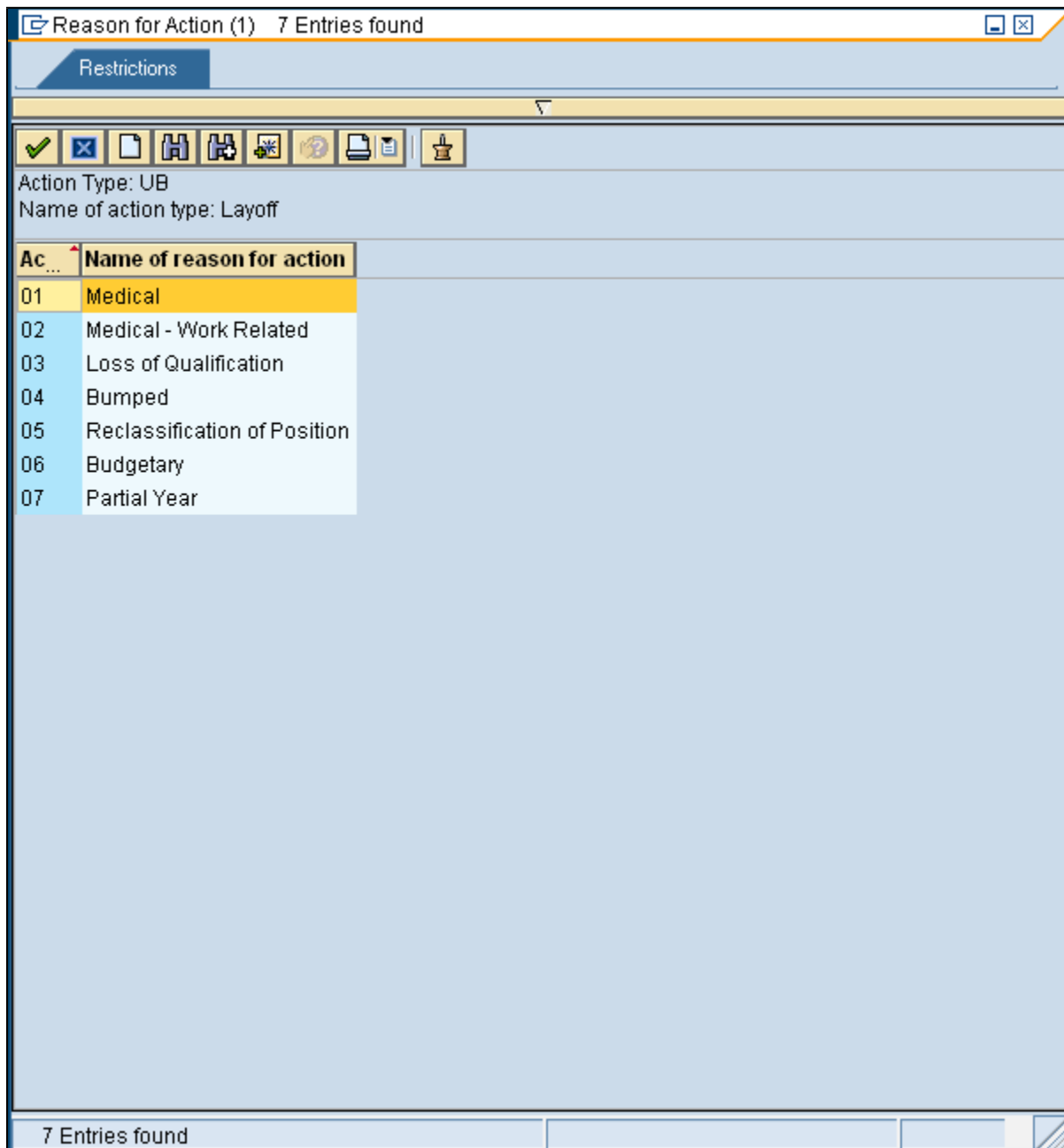
12. Click **Reason for Action** field .



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13. Click **Reason for Action** matchcode  .

Reason for Action (XXXX) YYYY Entries found



Reason for Action (1) 7 Entries found

Restrictions

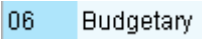

Action Type: UB
Name of action type: Layoff

Ac...	Name of reason for action
01	Medical
02	Medical - Work Related
03	Loss of Qualification
04	Bumped
05	Reclassification of Position
06	Budgetary
07	Partial Year

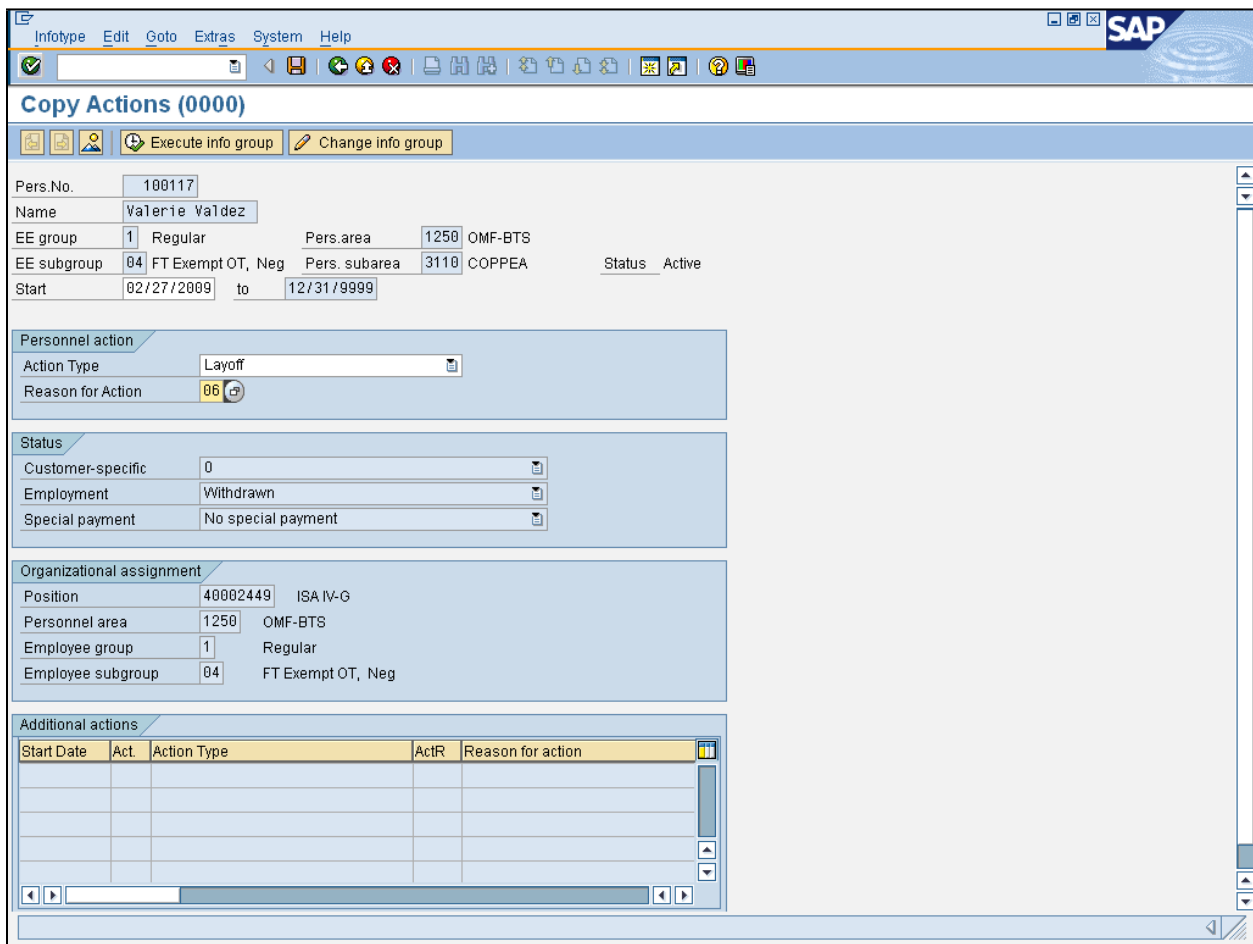
7 Entries found



Enter Personnel Action - Layoff (PA40)

- 14. Select **06 Budgetary** list item  .
- 15. Click **Enter (continue)** button  .

Copy Actions (0000)






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

- Pers.No.:** 100117
- Name:** Valerie Valdez
- EE group:** 1 Regular
- Pers.area:** 1250 OMF-BTS
- EE subgroup:** 04 FT Exempt OT, Neg
- Pers. subarea:** 3110 COPPEA
- Status:** Active
- Start:** 02/27/2009 to 12/31/9999

Below these fields are sections for 'Personnel action', 'Status', and 'Organizational assignment':

- Personnel action:** Action Type is 'Layoff', Reason for Action is '06'.
- Status:** Customer-specific is '0', Employment is 'Withdrawn', Special payment is 'No special payment'.
- Organizational assignment:** Position is '40002449 ISA IV-G', Personnel area is '1250 OMF-BTS', Employee group is '1 Regular', Employee subgroup is '04 FT Exempt OT, Neg'.

At the bottom, there is an 'Additional actions' table with columns: Start Date, Act, Action Type, ActR, Reason for action.

- 16. Click **Enter** button  . The *Copy Actions (0000)* screen displays.
- 17. Click **Save** button  . The *Create Vacancy* dialog box displays.
 The system returns the message, "Record valid from XXXX to YYYY delimited at end".



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Create Vacancy

Create Vacancy

S 40002449 Information Syst Analyst IV-Generalist

Create on

18. Click Yes button .

Copy Organizational Assignment (0001)

Infotype Edit Goto Extras System Help SAP

Copy Organizational Assignment (0001)

Personnel No	100117	Name	Valerie Valdez	
EE group	1 Regular	Pers.area	1250	OMF-BTS
EE subgroup	04 FT Exempt OT, Neg	Pers. subarea	3110	COPPEA
Start	02/27/2009 to		12/31/9999	Status Withdraw

Enterprise structure

CoCode	COP1	City of Portland	Subarea	3110	COPPEA
Pers.area	1250	OMF-BTS	Bus. Area	MF06	Tech Svcs
Cost Ctr	MFTS000010	SC T&M Billable	Fund	706000	Technology Service:
Grant	NOT-RELEVANT	NOT-RELEVANT			
Func. Area	LASC00000000006L	Support Center			

Personnel structure

EE group	1 Regular	Payr.area	Z1	CoP Bi-Weekly
EE subgroup	04 FT Exempt OT, Neg	Contract		

Organizational plan

Position	99999999	99999999
Job key	30000215	Information Syst Analyst
Exempt	E	
Org. Unit	20001031	


Administrator


Time	<input type="checkbox"/>
PayAdmin	<input type="checkbox"/>


Record created




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

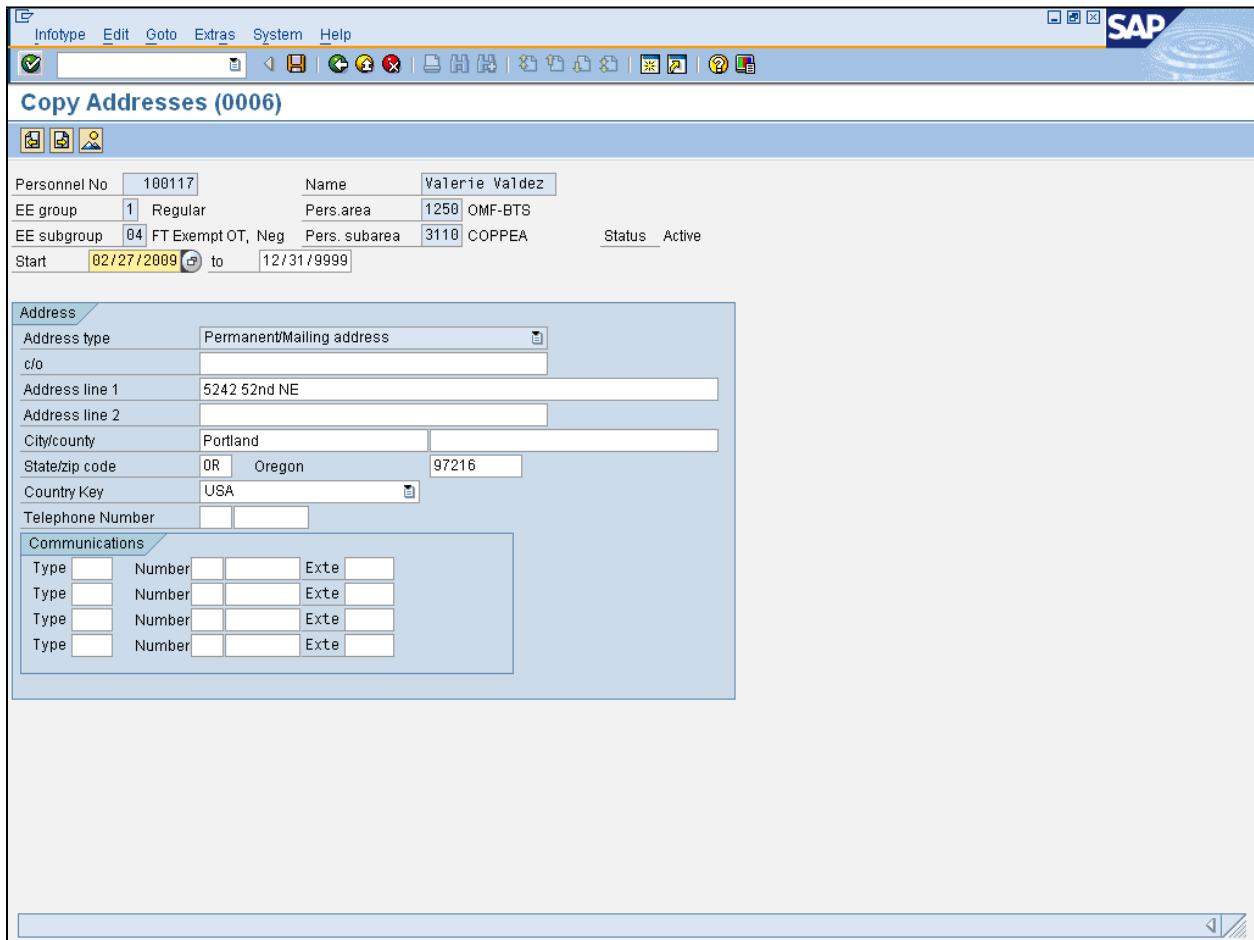
 The employee has been placed in a default position.

 The **Status** has changed to "Withdraw."

 The system returns the message, "Record created".

20. Click **Save** button  . The *Copy Addresses (0006)* screen displays.

Copy Addresses (0006)



The screenshot shows the SAP 'Copy Addresses (0006)' 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 displays the following data:

Personnel No	100117	Name	Valerie Valdez
EE group	1 Regular	Pers.area	1250 OMF-BTS
EE subgroup	04 FT Exempt OT, Neg	Pers. subarea	3110 COPPEA
Status	Active		
Start	02/27/2009	to	12/31/9999

Below this data is the 'Address' section with the following fields:




- Address type: Permanent/Mailing address
- c/o: [empty]
- Address line 1: 5242 52nd NE
- Address line 2: [empty]
- City/country: Portland
- State/zip code: OR Oregon 97216
- Country Key: USA
- Telephone Number: [empty]

At the bottom of the address section is a 'Communications' table:

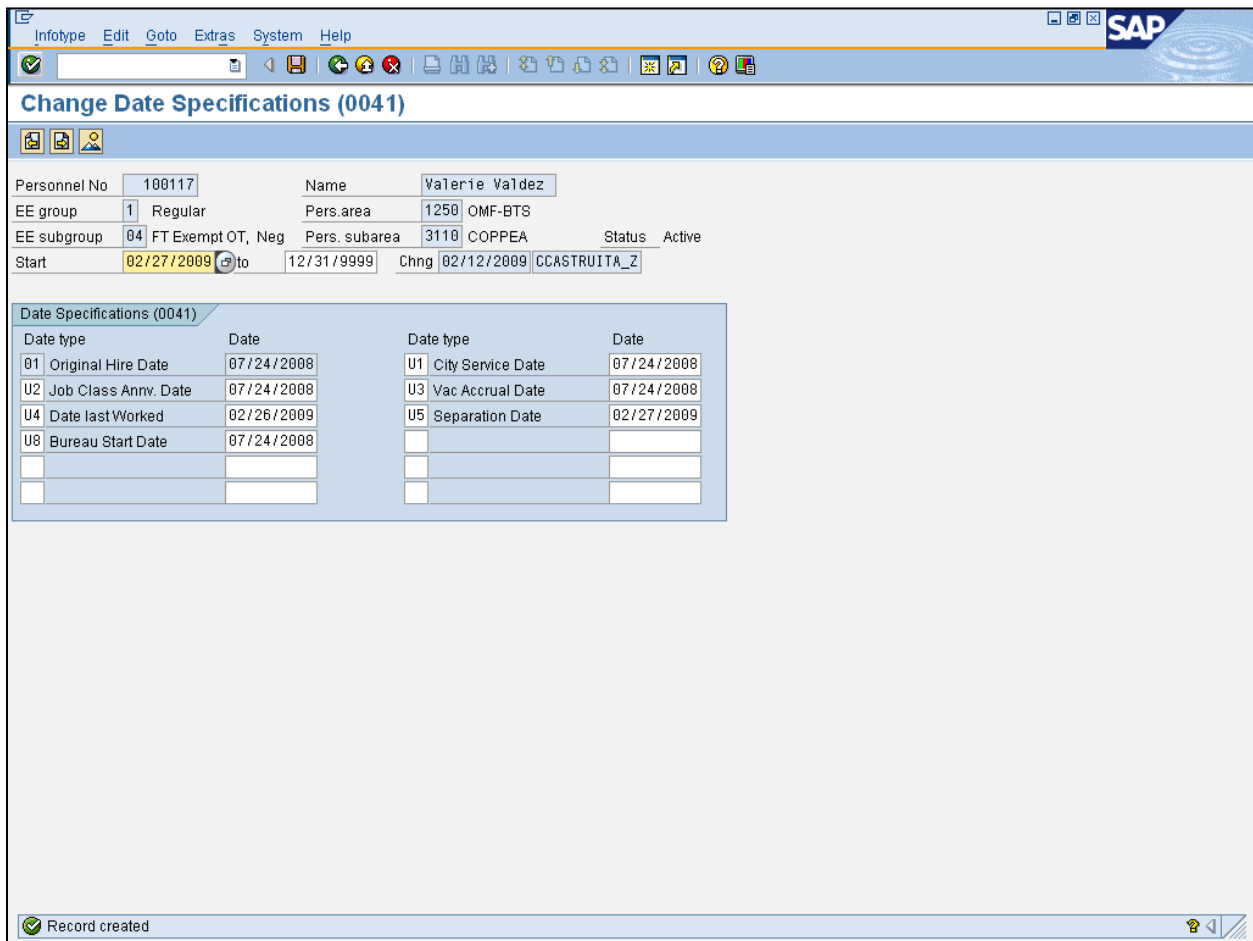
Type	Number	Exte
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>



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- 21. Click **Enter** button  . The *Copy Addresses (0006)* screen displays.
- 22. Click **Save** button  . The *Change Date Specifications (0041)* screen displays.
 The system returns the message, "Record valid from XXXX to YYYY delimited at end".

Change Date Specifications (0041)





The screenshot shows the SAP 'Change Date Specifications (0041)' 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 area contains the following data:

Personnel No	100117	Name	Valerie Valdez		
EE group	1 Regular	Pers.area	1250 OMF-BTS		
EE subgroup	04 FT Exempt OT, Neg	Pers. subarea	3110 COPPEA	Status	Active
Start	02/27/2009	to	12/31/9999	Chng	02/12/2009 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		

At the bottom of the screen, a status bar displays "Record created" with a green checkmark icon.

- 23. Click **Enter** button  . The screen updates.
 The system returns the message, "Record created".

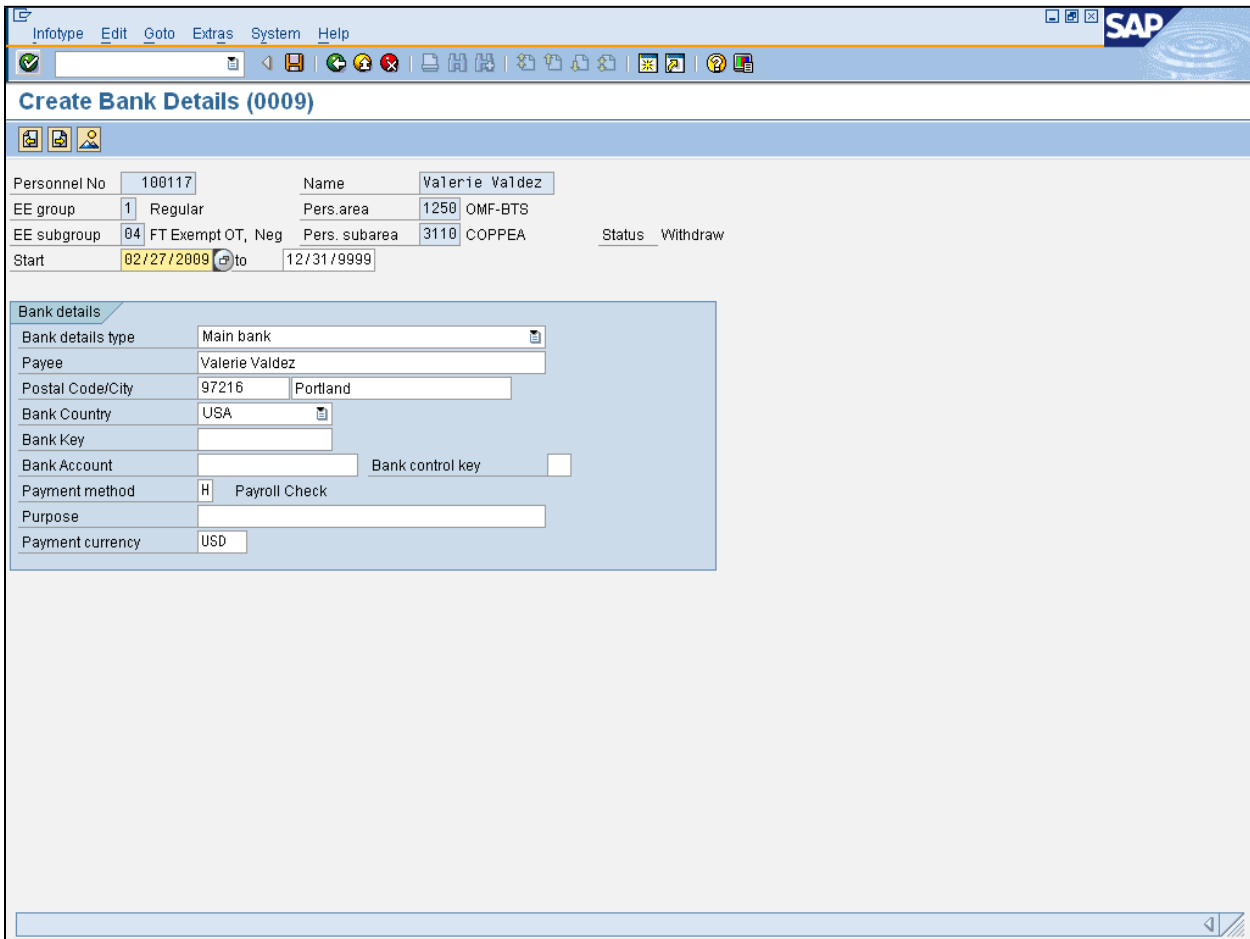


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 The system automatically enters the "Date Last Worked."

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

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	100117	Name	Valerie Valdez		
EE group	1 Regular	Pers.area	1250 OMF-BTS		
EE subgroup	04 FT Exempt OT, Neg	Pers. subarea	3110 COPPEA	Status	Withdraw
Start	02/27/2009	to	12/31/9999		

Below this is the 'Bank details' section with the following fields:

Bank details type	Main bank		
Payee	Valerie Valdez		
Postal Code/City	97216 Portland		
Bank Country	USA		
Bank Key			
Bank Account		Bank control key	
Payment method	H Payroll Check		
Purpose			
Payment currency	USD		

25. Click **Enter** button  . The *Create Bank Details (0009)* screen updates.

26. 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	100117	Name	Valerie Valdez	
EE group	1 Regular	Pers.area	1250	OMF-BTS
EE subgroup	04 FT Exempt OT, Neg	Pers. subarea	3110	COPPEA
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 selection column. The first row contains the data: 07/24/2008, 12/31/9999, 0001, System user name (SY-UNAWALDEZ), and is selected. Below the table is a status bar that says 'Entry 1 of 1'. At the bottom left, there is a message 'Record created' with a green checkmark icon.

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

The system returns the message, "Record created".

28. Click **Delimit** button



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Personnel Actions

The screenshot shows the SAP HR Personnel Actions interface. The top menu bar includes 'HR Master Data', 'Edit', 'Goto', 'Extras', 'Utilities(M)', 'Settings', 'System', and 'Help'. The SAP logo is in the top right corner. The main title is 'Personnel Actions'. On the left, there is a 'Find by' sidebar with options: 'Person', 'Collective search help', 'Search Term', and 'Free search'. The main area displays employee details for Valerie Valdez (Personnel no. 100117). The details include: Name: Valerie Valdez; EE group: 1 Regular; Pers. area: 1250 OMF-BTS; EE subgroup: 04 FT Exempt OT, Neg; Pers. subarea: 3110 COPPEA; Status: Active; From: 02/27/2009. Below this is a 'Personnel Actions' table with columns for Action Type, Person, EE group, and EE subgroup. The 'Layoff' row is highlighted in yellow. At the bottom left, a message icon indicates 'Records delimited'.

Action Type	Person	EE group	EE subgroup
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			

29. Click **Exit** button  .



The system returns the message, "Records delimited".



PA40

Work Instruction

Enter Personnel Action - Layoff (PA40)

Result

You have completed an employee layoff.