

# JOB AID

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**HRMS Create and Maintain Payroll Master Data**

## ***Appointment Change–Transfer***

**Section 1–For Personnel Administration Processors–page 2**

**Section 2–For Payroll Processor–page 11**

**Section 3–For Benefits Processor–page 14**





## **HRMS Create and Maintain Payroll Master Data**

### ***Appointment Change–Transfer***

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This procedure is used to process an appointment change for an active employee who is transferring to a valid position in their current agency, sub agency, or to another agency.

If the Employee is transferring to another agency, coordination is necessary between the gaining and losing agencies.

#### ***Losing agency:***

- HRMS updates to reflect any employee master data changes needed prior to appointment change (ex: Leave entries or deletions, garnishments, etc).
- PAY1 Health Insurance updates to reflect a *TRANSFER OUT (401 code)* of the employee. **Note:** For an employee transfer that occurs at any time prior to the end of the month, the losing agency is responsible for paying the employee's state share portion for the entire month.

#### ***Gaining agency:***

- HRMS updates to perform the appointment change action.
- Pay1 Health Insurance updates to reflect the new *HOME AGENCY/SUB-AGENCY, TRANSFER IN (201 code)* and *TRANSFER EFFECTIVE DATE (should always be the 1<sup>st</sup> of the month)*.

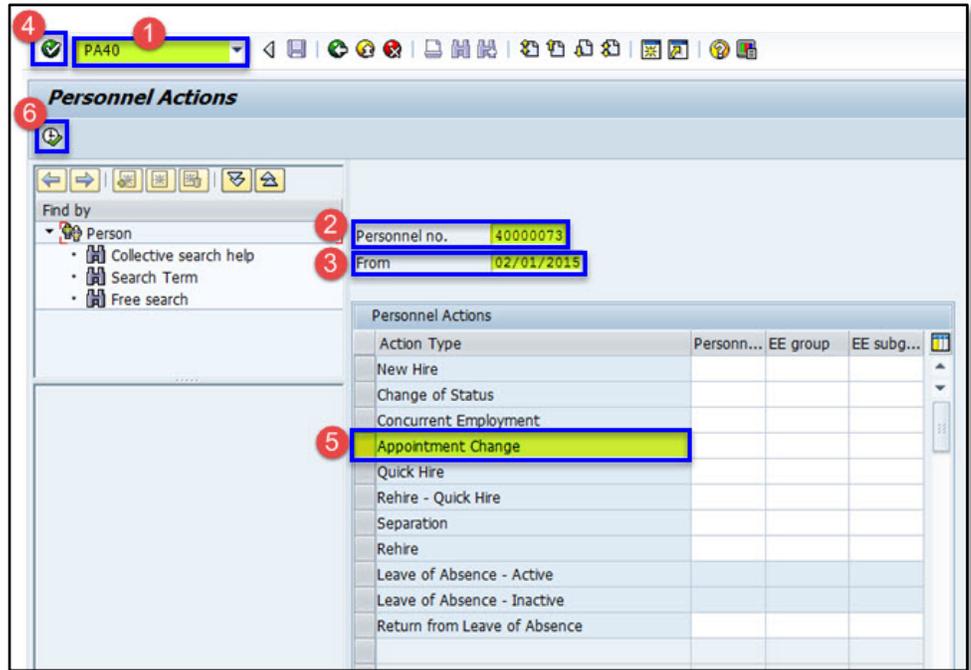
***DO NOT UPDATE ANY OTHER FIELDS ON THIS SCREEN UNTIL AFTER THE TRANSER TRANSACTION.*** Additional changes to the PAY1 A.41 screen will require a separate transaction.

## Section 1–For Personnel Administration Processor

### **IMPORTANT!**

If you are the **Personnel Administration (PA) Processor**, start on this page. If you are the **Payroll Processor**, skip to *Section 2-For Payroll Processor*.

1. Enter Transaction code **PA40** in the Command field and press the **Enter** key.
2. Enter the employee's **Personnel no.**
3. In the **From** field, type the effective date of the action. *Only enter the From date if you are the PA Processor initiating the appointment change.*
4. Click the **Enter** icon.
5. Select the box to the left of *Appointment Change*.
6. Click **Execute**.



The screenshot shows the 'Personnel Actions' window. At the top, a command field contains 'PA40' (callout 1) and an 'Enter' icon (callout 4). Below, the 'Find by' section has 'Person' selected (callout 6). The 'Personnel no.' field contains '40000073' (callout 2) and the 'From' field contains '02/01/2013' (callout 3). The 'Personnel Actions' table has 'Appointment Change' selected in the left column (callout 5).

Action Type	Personn...	EE group	EE subg...
New Hire			
Change of Status			
Concurrent Employment			
<b>Appointment Change</b>			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			

## Section 1–For Personnel Administration Processor

### *ACTION: Copy Actions (0000)*

1. Click inside the **Reason for Action** field. Click the match code button to view and select the appropriate action, then click the **Enter** button.

**Example:** 58 Transfer

2. Enter the Position Number in the **Position** field.

**Example:** 70016508

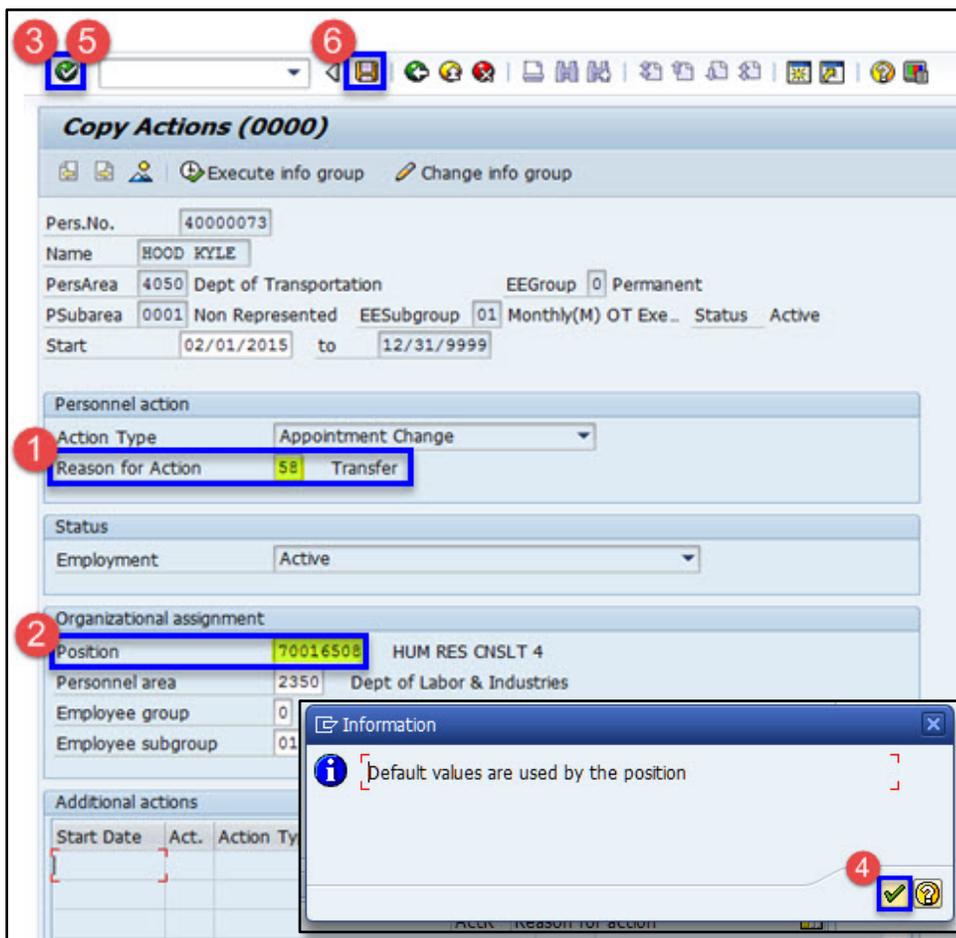
3. Click the **Enter** icon.

4. An *Information* window will appear. Click the **Enter** button to accept the position defaults.

5. Click the **Enter** icon again.

6. Click **Save**.

**FYI**–A message will appear at the bottom of the screen indicating that the prior record on file for this employee is being delimited. This is correct.



**Copy Actions (0000)**

Execute info group    Change info group

Pers.No. 40000073  
 Name HOOD KYLE  
 PersArea 4050 Dept of Transportation    EEGroup 0 Permanent  
 PSubarea 0001 Non Represented    EESubgroup 01 Monthly(M) OT Exe... Status Active  
 Start 02/01/2015 to 12/31/9999

Personnel action

1 Action Type Appointment Change  
 Reason for Action 58 Transfer

Status

Employment Active

2 Organizational assignment

Position 70016508 HUM RES CNSLT 4  
 Personnel area 2350 Dept of Labor & Industries  
 Employee group 0  
 Employee subgroup 01

Additional actions

Start Date	Act.	Action Ty

Information  
 [i] Default values are used by the position

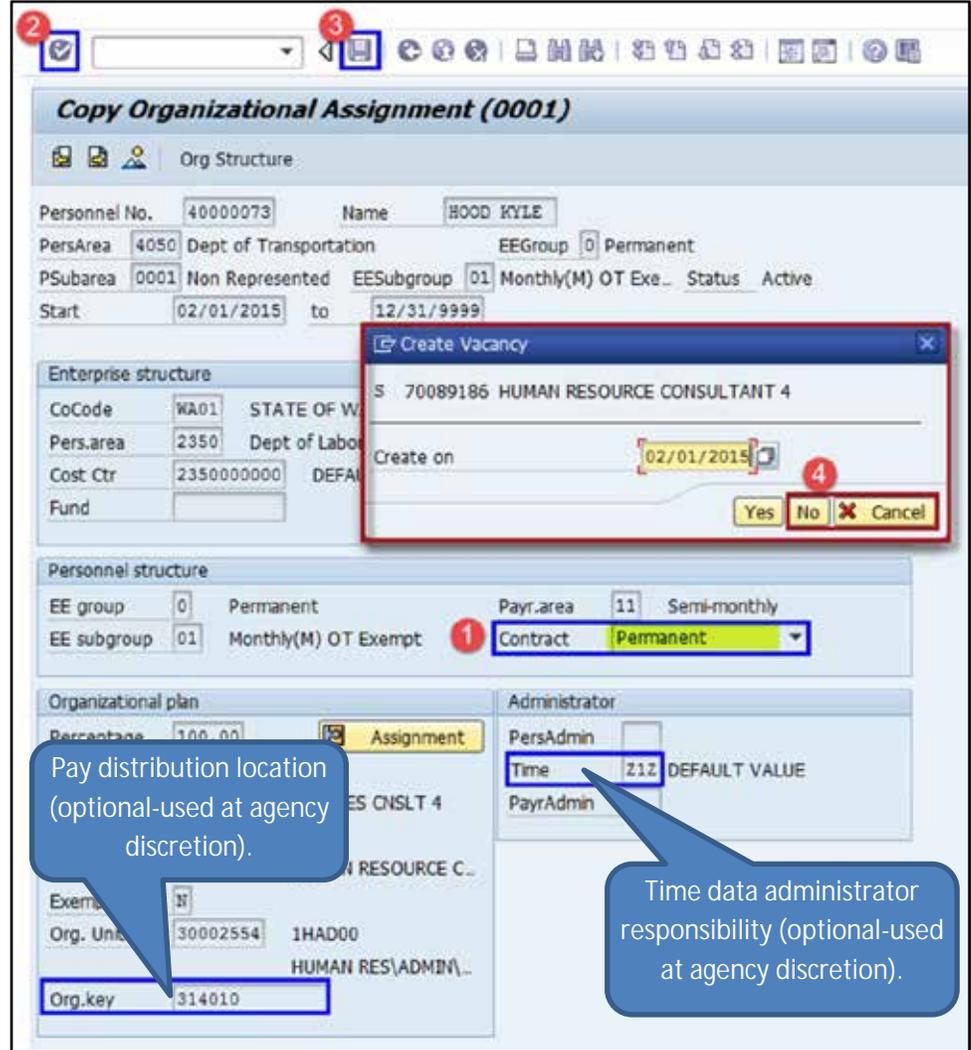
4

## Section 1–For Personnel Administration Processor

**ACTION:** Copy Organizational Assignment (0001)

1. In the **Contract** field, select the status of the appointment from the drop-down list.  
**Example:** Permanent
2. Click the **Enter** icon.
3. Click **Save**.
4. The *Create Vacancy* box will appear. Click **No** or **Cancel**.

*As the gaining agency, you cannot create the vacancy for the losing agency's position. As a courtesy, please contact the losing agency to inform them of the vacancy.*



**Copy Organizational Assignment (0001)**

Org Structure

Personnel No. 40000073 Name HOOD KYLE  
 PersArea 4050 Dept of Transportation EEGroup 0 Permanent  
 PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active  
 Start 02/01/2015 to 12/31/9999

Enterprise structure  
 CoCode WA01 STATE OF W...  
 Pers.area 2350 Dept of Labor...  
 Cost Ctr 2350000000 DEFA...  
 Fund

Personnel structure  
 EE group 0 Permanent Payr.area 11 Semi-monthly  
 EE subgroup 01 Monthly(M) OT Exempt **1** Contract Permanent **4**

Organizational plan  
 Percentage 100.00 Assignment  
 Org. Unit 30002554 1HAD00 HUMAN RES\ADMIN...  
 Org.key 314010

Administrator  
 PersAdmin  
 Time 212 DEFAULT VALUE  
 PayrAdmin

**Create Vacancy**  
 S: 70089186 HUMAN RESOURCE CONSULTANT 4  
 Create on 02/01/2015  
 Yes No **4** Cancel

Pay distribution location (optional-used at agency discretion).

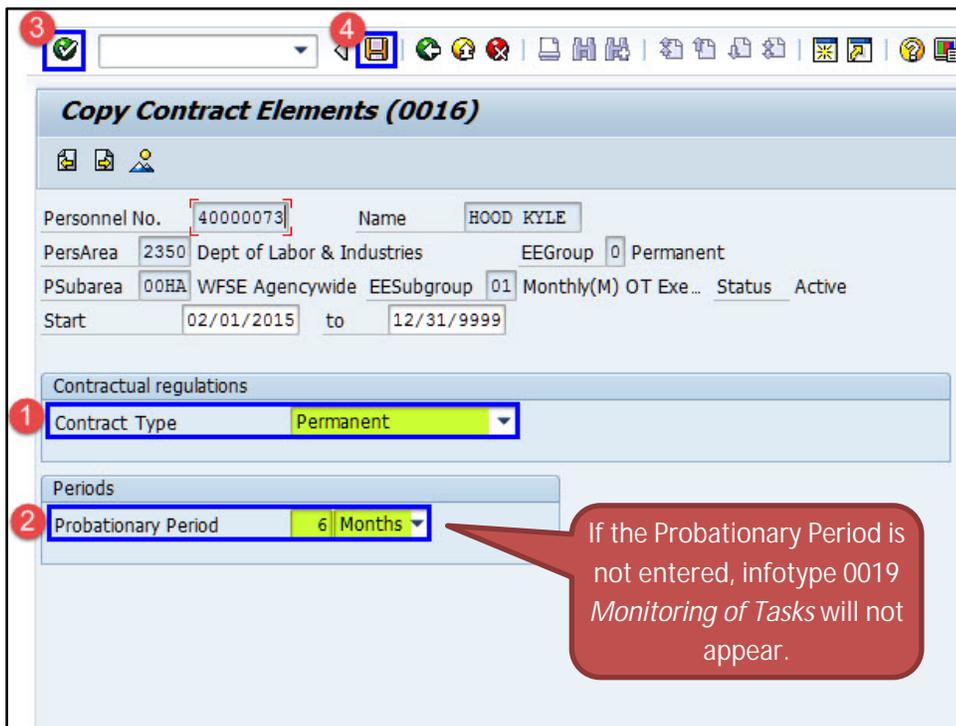
Time data administrator responsibility (optional-used at agency discretion).

## Section 1–For Personnel Administration Processor

**ACTION:** Copy Contract Elements (0016)

1. From the **Contract Type** drop-down list, select the correct status.
2. From the drop-down list, choose the correct length of the employee's **Probationary Period**.
3. Click the **Enter** icon.
4. Click **Save**.

**FYI**–A message will appear at the bottom of the screen indicating that the prior record on file for this employee is being delimited.



**Copy Contract Elements (0016)**

Personnel No. 40000073 Name HOOD KYLE

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00HA WFSE Agencywide EESubgroup 01 Monthly(M) OT Exe... Status Active

Start 02/01/2015 to 12/31/9999

Contractual regulations

Contract Type Permanent

Periods

Probationary Period 6 Months

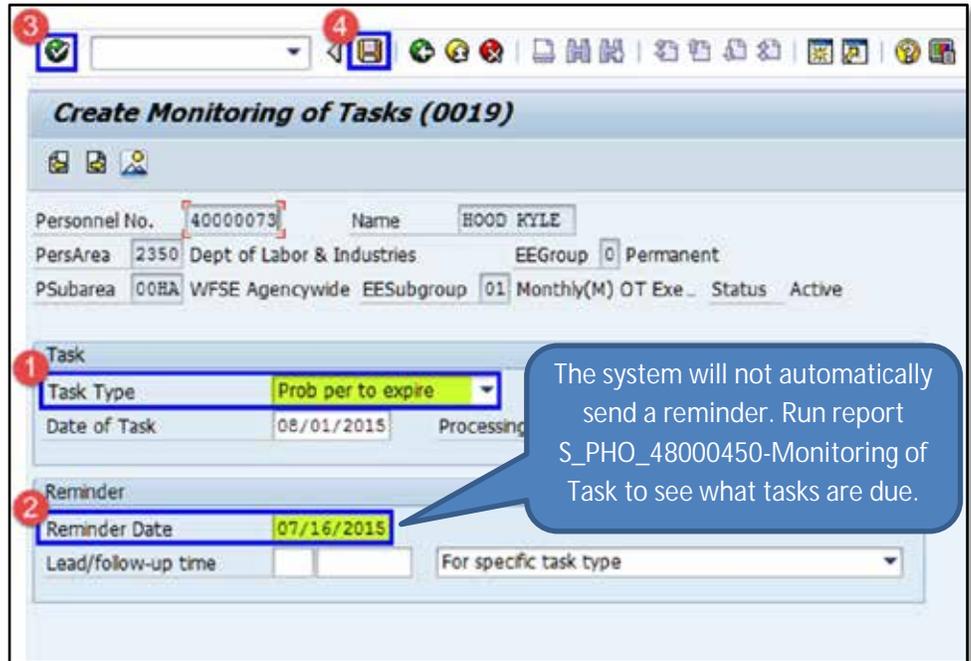
If the Probationary Period is not entered, infotype 0019 Monitoring of Tasks will not appear.

## Section 1–For Personnel Administration Processor

**ACTION:** Create Monitoring of Tasks (0019)

1. Select the correct **Task Type** from the drop-down list.
2. Enter the desired **Reminder Date** for the *Task Type*. (*Optional*)
3. Click the **Enter** icon.
4. Click **Save**.

**Note:** You can use the *Lead/follow-up time* field to determine the **Reminder Date** based on the *Date of Task*.



**Create Monitoring of Tasks (0019)**

Personnel No. 40000073 Name HOOD KYLE  
 PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent  
 PSubarea 00BA WFSE Agencywide EESubgroup 01 Monthly(M) OT Exe... Status Active

**Task**  
 Task Type Prob per to expire  
 Date of Task 08/01/2015 Processing

**Reminder**  
 Reminder Date 07/16/2015  
 Lead/follow-up time For specific task type

The system will not automatically send a reminder. Run report S\_PHO\_48000450-Monitoring of Task to see what tasks are due.

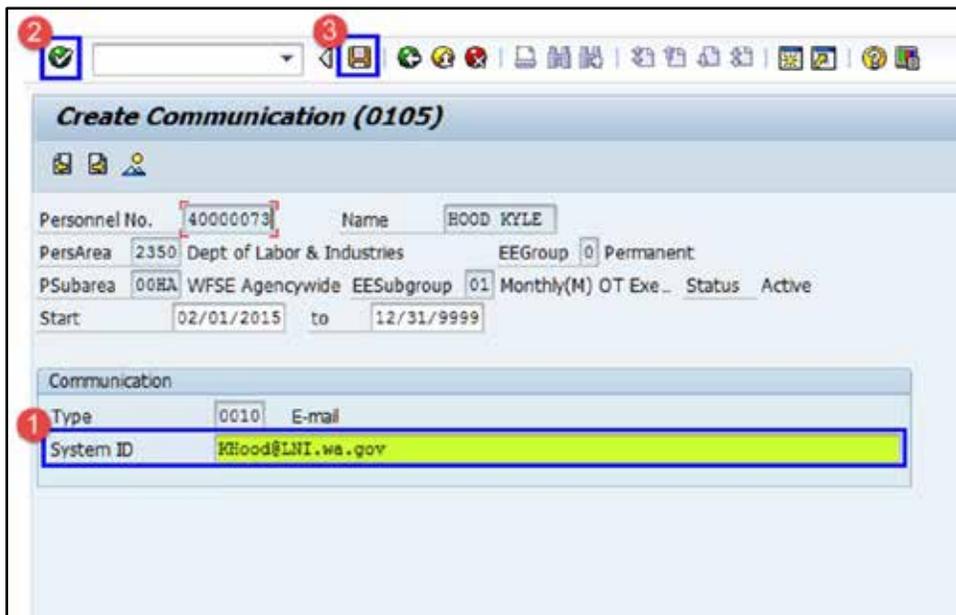
## Section 1–For Personnel Administration Processor

### *ACTION: Create Communication (0105)*

1. In the **System ID** field, enter the employee's email address.
2. Click the **Enter** icon.
3. Click **Save**.

**NOTE:** If you don't know the email address at the time of the processing, click the *Next Record* button to move to the next infotype.

Enter the email address later using Maintain HR Master Data PA30.



Communication	
Type	0010 E-mail
System ID	KHood@LNI.wa.gov

## Section 1–For Personnel Administration Processor

**ACTION:** Create Planned Working Time (0007)

1. The **Work Schedule Rule** will default to *Full*.

If the employee is not on a *FULL 5-8s M-F 8hpd* work schedule, click inside the **Work Schedule Rule** field and select the appropriate match code from the list.

2. From the **Time Mgmt. status** drop-down list, select the correct part of the work schedule that the employee is assigned to and signifies how hours are calculated. (see box #1)

3. Select the check box **only** if employee is part-time.

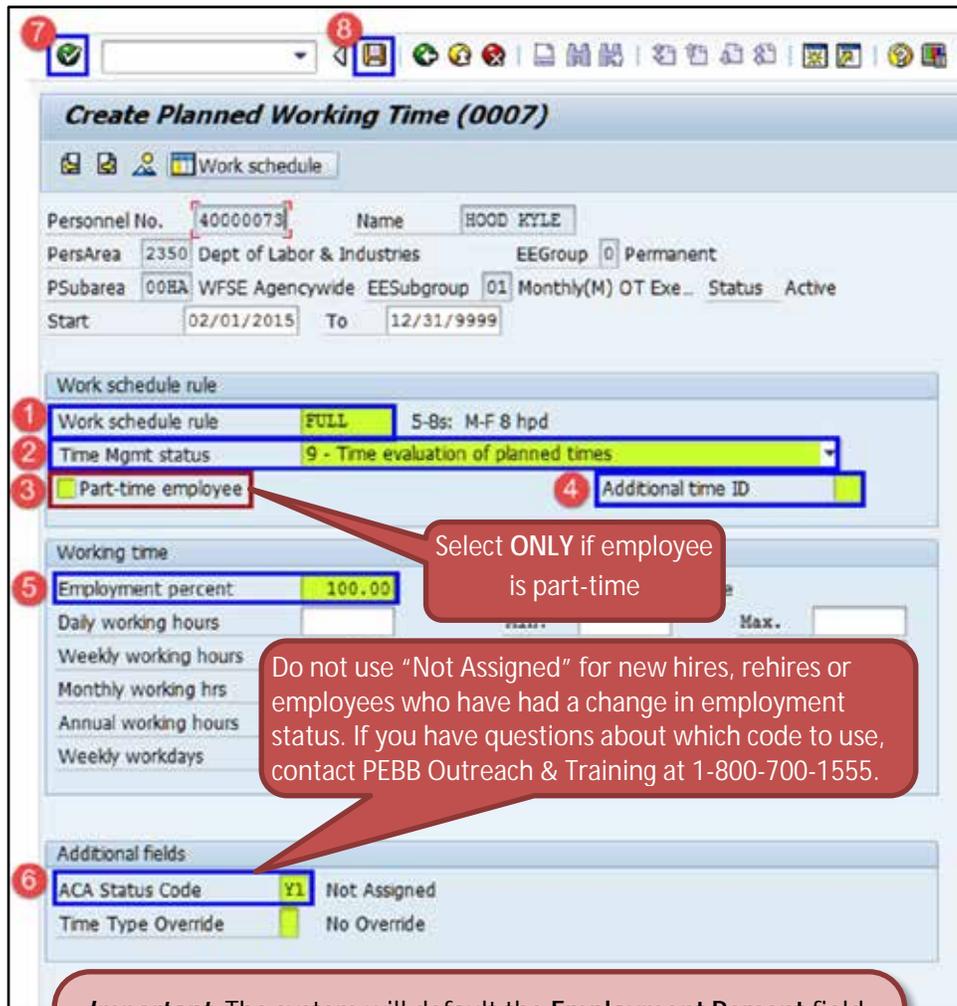
4. Enter how the employee will accrue leave. (see box #2)

5. In the **Employment percent** field, enter the percentage of time the employee will work.

6. In the **ACA Status Code** field, select the average hours per month for the employee from the match code list.

7. Click the **Enter** icon.

8. Click **Save**.



The screenshot shows the 'Create Planned Working Time (0007)' form. The form fields are as follows:

- Personnel No.:** 40000073
- Name:** HOOD KYLE
- PersArea:** 2350 Dept of Labor & Industries
- EEGroup:** 0 Permanent
- PSubarea:** 00BA WFSE Agencywide
- EESubgroup:** 01 Monthly(M) OT Exe...
- Status:** Active
- Start:** 02/01/2015
- To:** 12/31/9999

**Work schedule rule section:**

- 1. Work schedule rule: FULL 5-8s: M-F 8 hpd
- 2. Time Mgmt status: 9 - Time evaluation of planned times
- 3. Part-time employee:
- 4. Additional time ID:

**Working time section:**

- 5. Employment percent: 100.00
- Daily working hours:
- Weekly working hours:
- Monthly working hrs:
- Annual working hours:
- Weekly workdays:

**Additional fields section:**

- 6. ACA Status Code: Y1 Not Assigned
- Time Type Override:  No Override

**Callouts:**

- Callout 1: Select ONLY if employee is part-time (pointing to Part-time employee checkbox).
- Callout 2: Do not use "Not Assigned" for new hires, rehires or employees who have had a change in employment status. If you have questions about which code to use, contact PEBB Outreach & Training at 1-800-700-1555. (pointing to ACA Status Code field).

**Important:** The system will default the **Employment Percent** field to 100. If the employee is going to work less than 100%, you **must** enter the percent. If there are changes to this field, the same percent value **must** be entered in the *Basic Pay (0008) Cap. Util.lvl* field.

### BOX #1–Time Mgmt status

Select:

1-Time Evaluation of actual times for **Hourly** employees  
9-Time Evaluation of planned times for **Monthly** employees

### BOX #2–Leave Accrual Types

Enter:

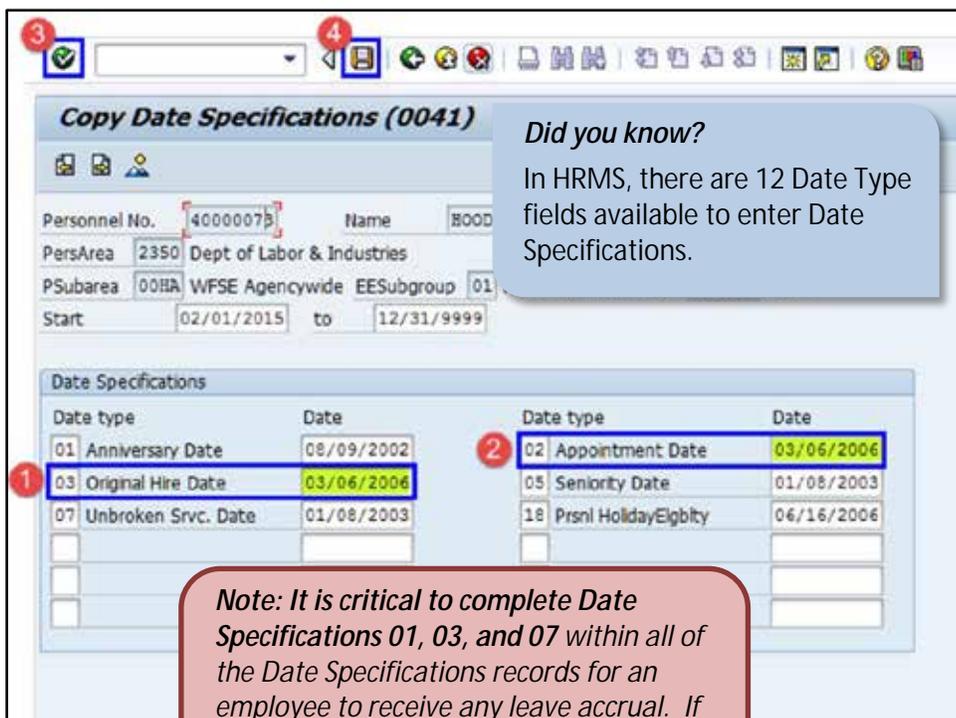
00 for full **normal** leave accrual (default if left blank)  
01 for **NO** leave accrual  
02 for sick leave accrual only

## Section 1–For Personnel Administration Processor

### *ACTION: Copy Date Specifications (0041)*

Review the employee's date types and dates, and make necessary adjustments.

1. If the employee is transferring to a **new** agency, the *Date type* **Original Hire Date** field should reflect the date the employee started with the new agency. If this *Date Type* is missing, click the match code to select it.
2. In the *Date type* **Appointment Date** field, enter the effective date of the appointment. If this *Date Type* is missing, click the match code to select it.
3. Click the **Enter** icon.
4. Click **Save**.



**Copy Date Specifications (0041)**

Personnel No. 40000073 Name BOOD  
 PersArea 2350 Dept of Labor & Industries  
 PSubarea 00BA WFSE Agencywide EESubgroup 01  
 Start 02/01/2015 to 12/31/9999

Date type	Date	Date type	Date
01 Anniversary Date	08/09/2002	02 Appointment Date	03/06/2006
03 Original Hire Date	03/06/2006	05 Seniority Date	01/08/2003
07 Unbroken Svc. Date	01/08/2003	18 Prsnl HolidayElgblty	06/16/2006

**Did you know?**  
 In HRMS, there are 12 Date Type fields available to enter Date Specifications.

**Note:** It is critical to complete Date Specifications 01, 03, and 07 within all of the Date Specifications records for an employee to receive any leave accrual. If those entries are missing, the system will not allow for leave accrual.

## Section 1–For Personnel Administration Processor

**ACTION:** Create Basic Pay (0008)

1. In the **Reason** field, click the match code to open the *Reason for Changing Master Data* screen. Select the correct reason and click the **Enter** button.

*Example: 20–Appointment Change*

2. Verify that the **Next inc. value** is correct for the next pay increase date.

*If the employee is eligible for a periodic increment (PID) or longevity step, and moves to a new Pay Scale Type, Pay Scale Area, Pay Scale Group or Pay Scale Level, the agency HR Processor **must** input the employee's current PID in the **Next inc** field on the Basic Pay Infotype.*

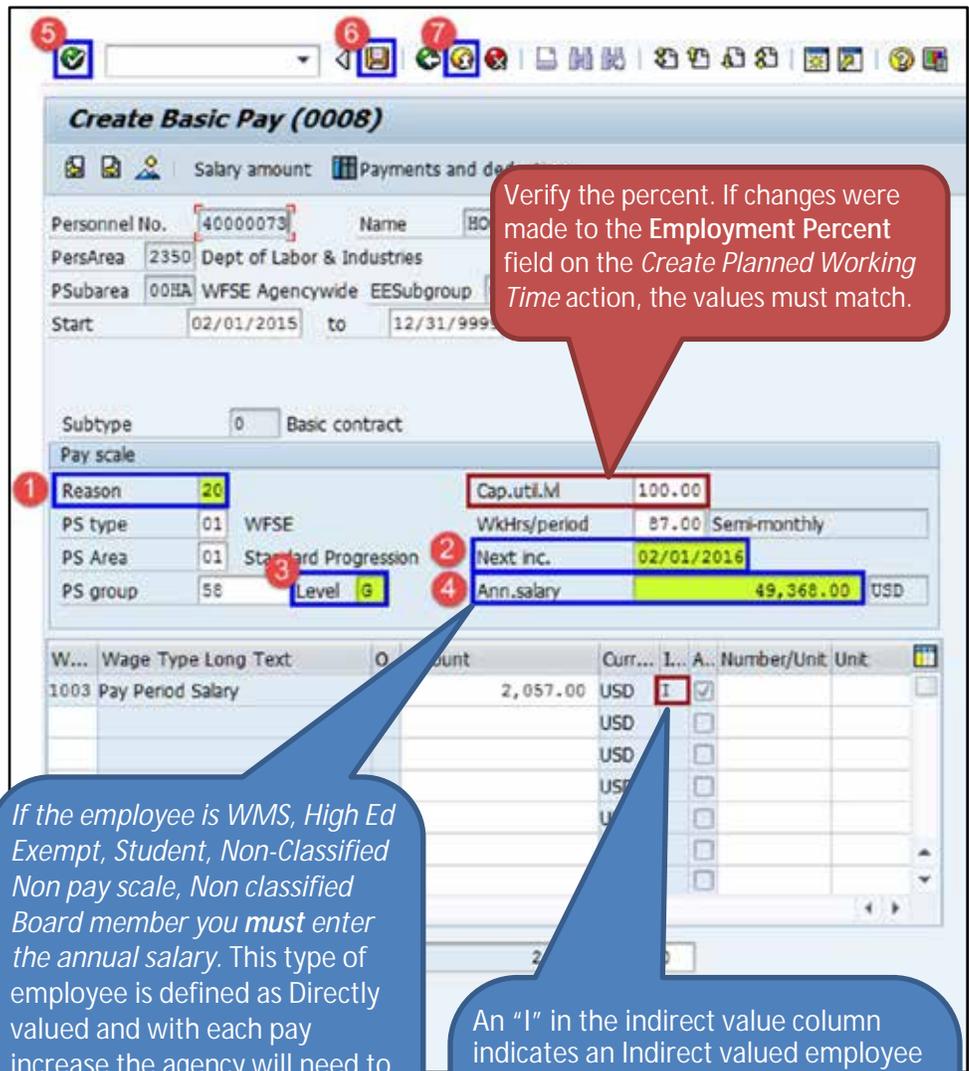
3. If the pay scale step is other than the default of **A**, enter the correct **Level**.

4. The **Ann. Salary** field will populate according to the *PS group* and *Level*.

5. Click the **Enter** icon.

6. Click **Save**.

7. If you are not performing the *Payroll Processor* functions, click **Exit**.



Verify the percent. If changes were made to the **Employment Percent** field on the *Create Planned Working Time* action, the values must match.

*If the employee is WMS, High Ed Exempt, Student, Non-Classified Non pay scale, Non classified Board member you **must** enter the annual salary. This type of employee is defined as Directly valued and with each pay increase the agency will need to manually update this field.*

An "I" in the indirect value column indicates an Indirect valued employee will have their salary based upon the State Compensation Plan that is administered by the OFM State Human Resource Office. If this field is blank, it indicates the employee is Directly valued and the agency is responsible for maintaining this infotype when the employee is due a pay increase.

**NOTE:** This marks the end of the Appointment Change action for the *Personnel Administration Processor*. After saving, click **Exit** and give the packet to the *Payroll Processor* who will continue the action.

## Section 2–For Payroll Processor

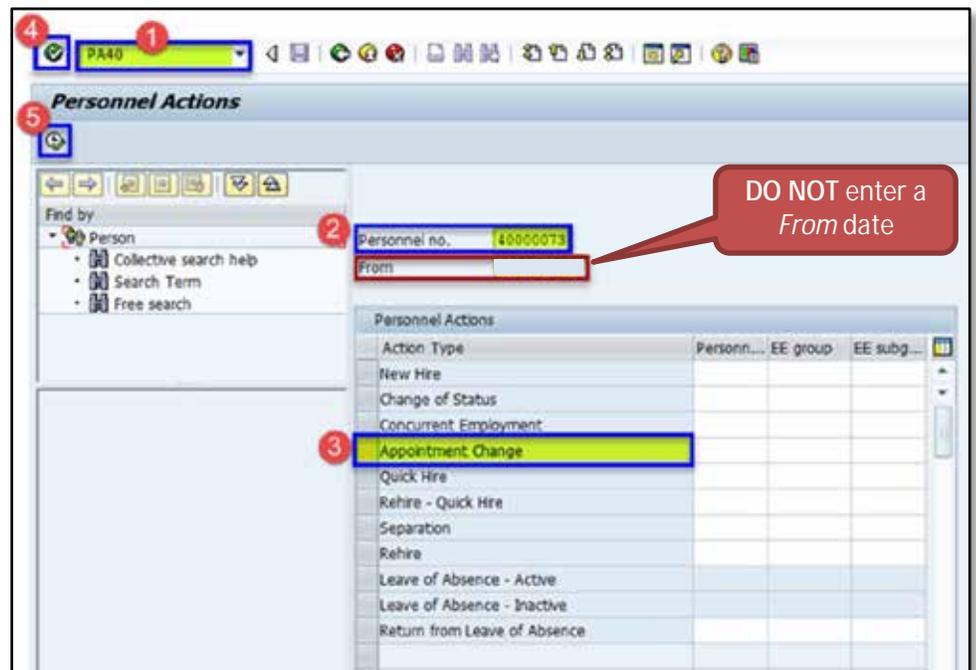


### IMPORTANT!

If you are the **Payroll Processor**, start on this page. If you are the **Benefits Processor**, skip to *Section 3-For Benefits Processor*.

1. Enter Transaction Code **PA40** in the Command Field and press the **Enter** key.
2. Enter the employee's **Personnel Number**.
3. Select the box to the left of *Appointment Change*.
4. Click the **Enter** icon.
5. Click **Execute**.

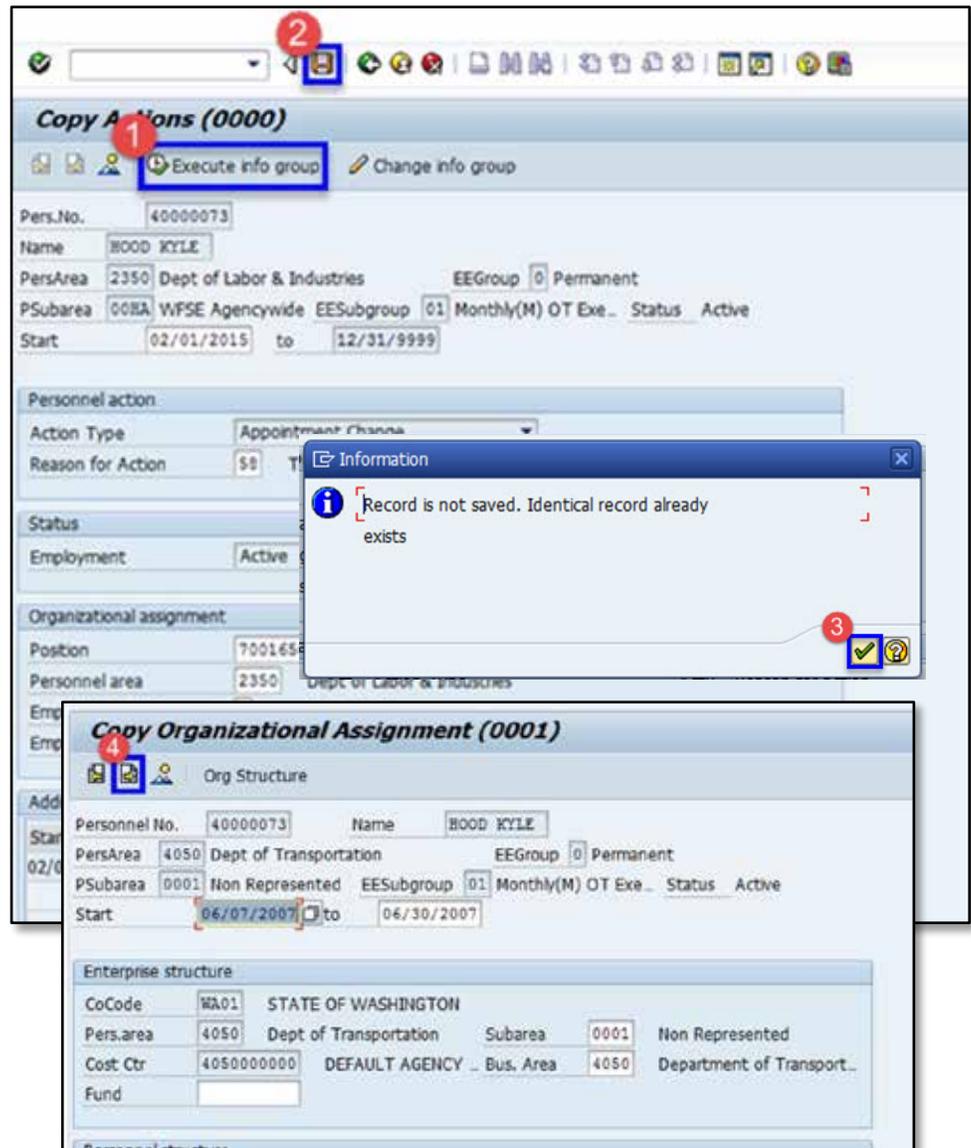
The *Copy Actions* screen will appear.



## Section 2–For Payroll Processor

*ACTION: Copy Actions (0000)*

1. Click **Execute info group**. A message will appear at the bottom of the screen stating, “Record stored only in Additional Actions infotype. Save.”
2. Click **Save**.
3. An Information box will appear. Click the **Enter** button.
4. The *Copy Organizational Assignment* screen will appear. Click **Next Record** until you reach the *Copy Add. Withh. Info. US (0234)* infotype.



The screenshot displays two overlapping HRMS screens. The top screen is titled "Copy Actions (0000)" and shows a form for a personnel record. The "Execute info group" button is highlighted with a red circle and a blue box, labeled with a red "1". A red "2" is placed over the "Save" button in the top right corner. An "Information" dialog box is open in the center, displaying the message: "Record is not saved. Identical record already exists". A red "3" is placed over the "Enter" button in the bottom right corner of the dialog box. The bottom screen is titled "Copy Organizational Assignment (0001)" and shows a form for an organizational assignment. A red "4" is placed over the "Next Record" button in the top left corner.

**Copy Actions (0000)**

Pers.No. 40000073  
Name BOOD KYLE  
PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent  
PSubarea 008A WFSE Agencywide EESubgroup 01 Monthly(M) OT Exe... Status Active  
Start 02/01/2015 to 12/31/9999

Personnel action:  
Action Type Appointment Change  
Reason for Action S8  
Status  
Employment Active

Organizational assignment:  
Position 700165  
Personnel area 2350 Dept of Labor & Industries

**Information**  
Record is not saved. Identical record already exists

**Copy Organizational Assignment (0001)**

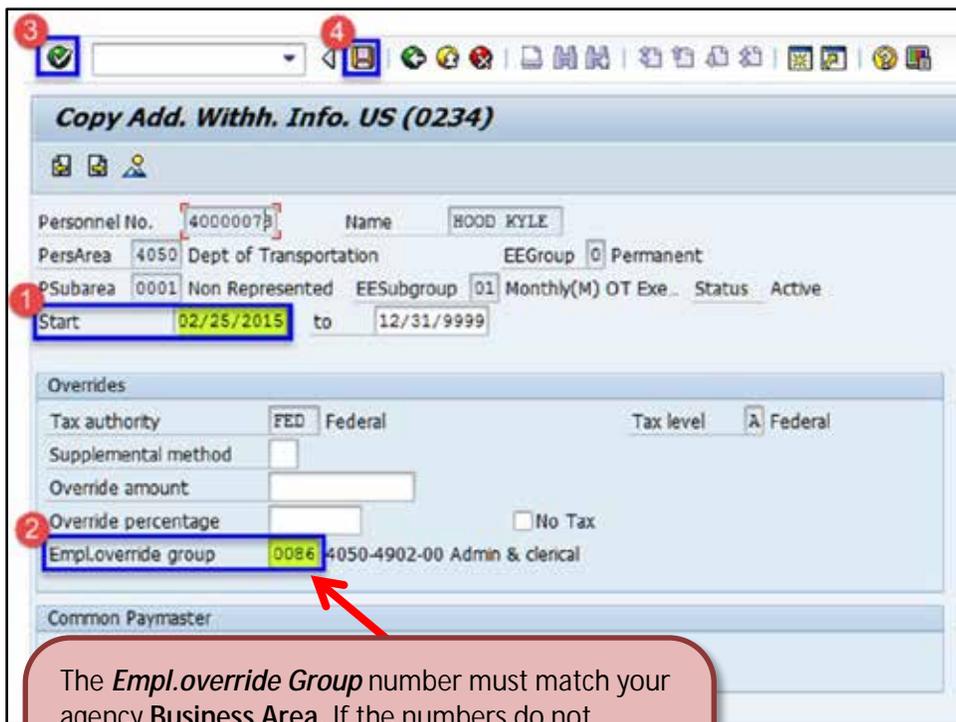
Org Structure  
Personnel No. 40000073 Name BOOD KYLE  
PersArea 4050 Dept of Transportation EEGroup 0 Permanent  
PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active  
Start 06/07/2007 to 06/30/2007

Enterprise structure:  
CoCode WA01 STATE OF WASHINGTON  
Pers.area 4050 Dept of Transportation Subarea 0001 Non Represented  
Cost Ctr 4050000000 DEFAULT AGENCY... Bus. Area 4050 Department of Transport...  
Fund

## Section 2–For Payroll Processor

**ACTION:** Copy Add. Withh. Info. Us (0234)

1. In the **Start** field, enter the first pay date the employee will have in the gaining agency.
2. If you know the **Empl. override group** code, enter it and then press the **Enter** key. If not, select the correct code from the match code list and then click the **Enter** button to close the match code window.
3. Click the **Enter** icon.
4. Click **Save**.



The screenshot shows the 'Copy Add. Withh. Info. US (0234)' form. Key fields include: Personnel No. 4000007, Name HOOD KYLE, PersArea 4050, Dept of Transportation, EESubgroup 01, and Start date 02/25/2015. The 'Empl.override group' field is set to 0086. A red arrow points to this field from a callout box. The 'Enter' icon in the top toolbar is also highlighted with a red box.

The *Empl.override Group* number must match your agency **Business Area**. If the numbers do not match, it will cause incorrect amounts of Medical Aid being withheld from your employee. *If unsure of which code to use, contact the Department of Labor & Industries.*

**NOTE:** This marks the end of the Appointment Change action for the *Payroll Processor*. If you are also the *Benefits Processor*, continue with the action. If not, after saving, click **Exit** and give the packet to the *Benefits Processor* who will continue the action.

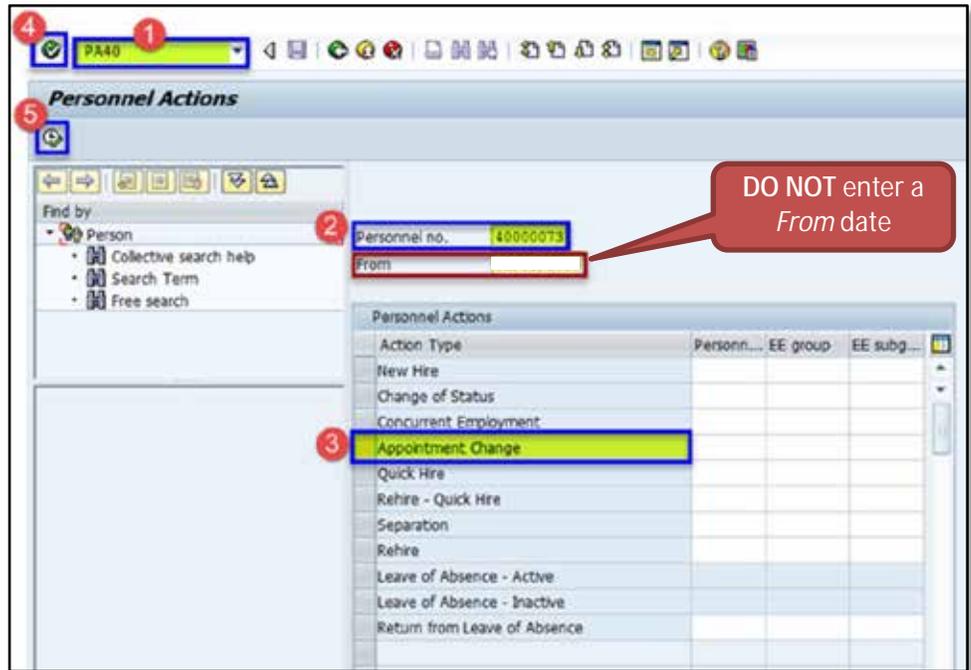
## Section 3–For Benefits Processor

### **IMPORTANT!**

If you are the **Benefits Processor** only, start on this page. If you are a **PA Processor** or **Payroll Processor** also performing the Benefits Processor function, skip to the *Create General Benefits Information* action later in this section.

1. Enter Transaction code **PA40** in the Command field and press the **Enter** key.
2. Enter the employee's **Personnel Number**.
3. Select the box to the left of *Appointment Change*.
4. Click the **Enter** icon.
5. Click **Execute**.

The *Copy Actions* screen will appear.



The screenshot shows the 'Personnel Actions' screen. At the top, a command field contains 'PA40'. Below it, a search field contains the personnel number '48000073'. A list of personnel actions is displayed, with 'Appointment Change' highlighted. A red callout box points to the 'From' date field with the text 'DO NOT enter a From date'.

Personnel Actions	Personnel no.	EE group	EE subg...
New Hire			
Change of Status			
Concurrent Employment			
<b>Appointment Change</b>			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			

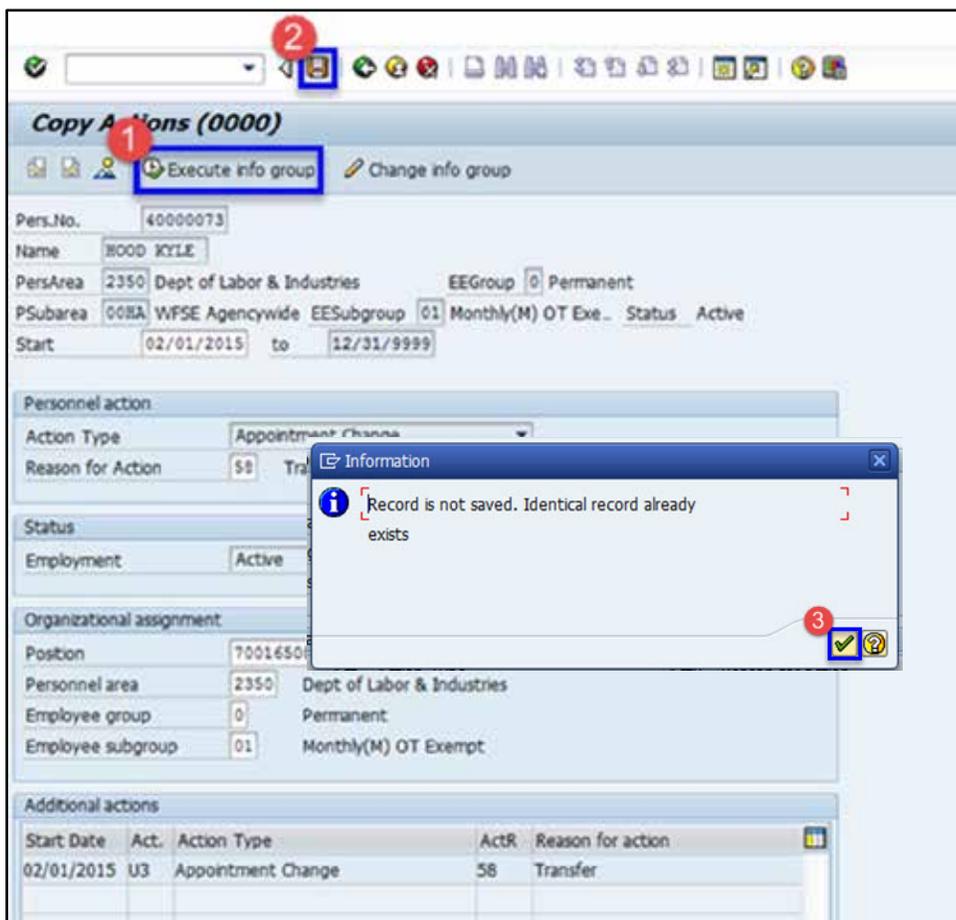
## Section 3–For Benefits Processor

**ACTION: Copy Actions (0000)**

1. Click Execute info group. A message will appear, stating, “Record stored only in Additional Actions infotype. Save.”
2. Click **Save**.
3. The Information box will appear. Click **Save**.

The *Copy Organizational Assignment* screen will appear.

Click the **Next Record** icon until you reach the **Create Add. Withh. Info. Us (0234)** infotype.



**Copy Actions (0000)**

Execute info group    Change info group

Pers.No. 40000073  
 Name BOOD KYLE  
 PersArea 2350 Dept of Labor & Industries    EEGroup 0 Permanent  
 PSubarea 008A WFSE Agencywide    EESubgroup 01 Monthly(M) OT Exe.    Status Active  
 Start 02/01/2015 to 12/31/9999

Personnel action:  
 Action Type Appointment Change  
 Reason for Action 58 Tra

Status:  
 Employment Active

Organizational assignment:  
 Position 7001650  
 Personnel area 2350 Dept of Labor & Industries  
 Employee group 0 Permanent  
 Employee subgroup 01 Monthly(M) OT Exempt

Additional actions

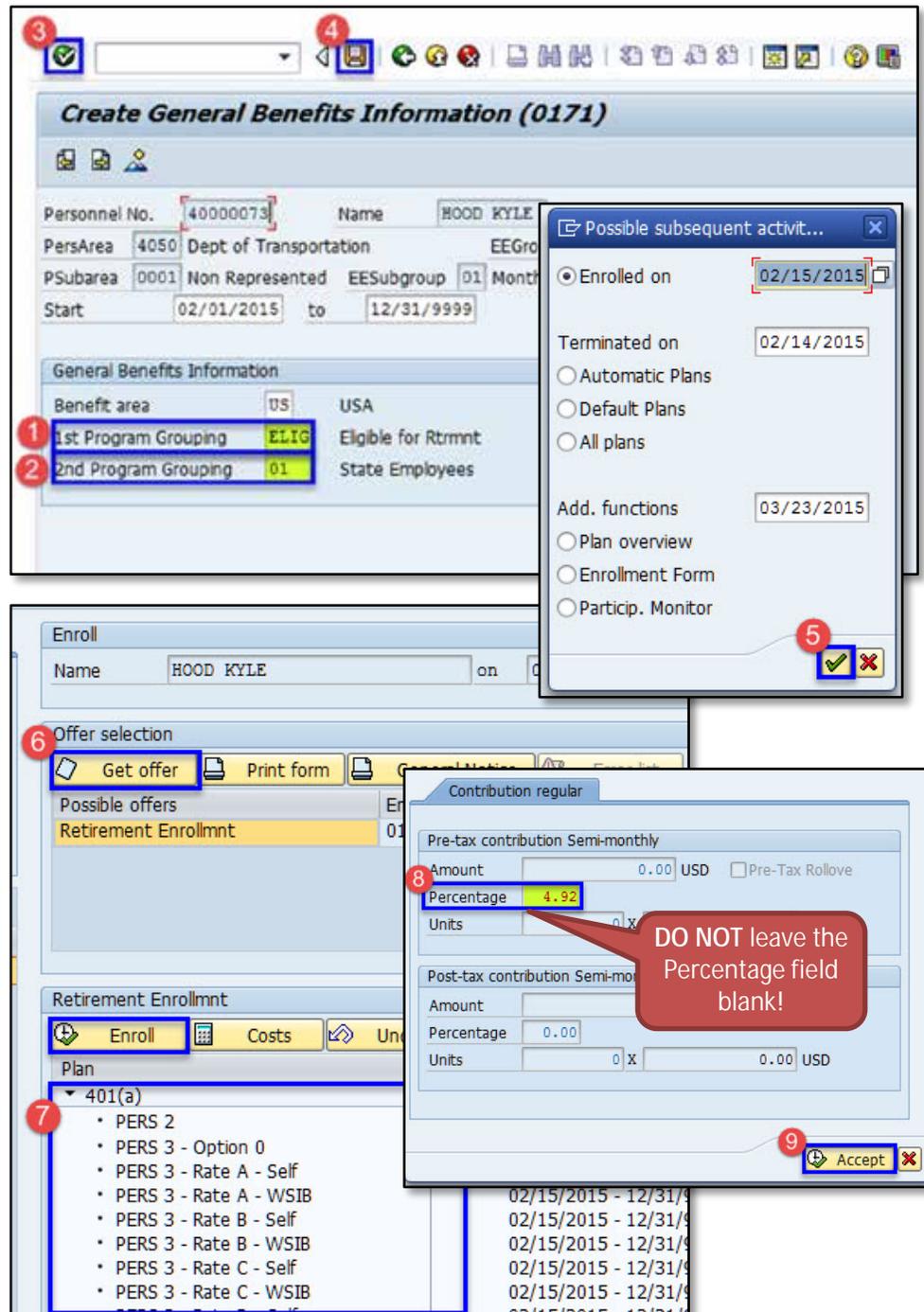
Start Date	Act.	Action Type	ActR	Reason for action
02/01/2015	U3	Appointment Change	58	Transfer

Information: Record is not saved. Identical record already exists

## Section 3–For Benefits Processor

**ACTION:** Create General Benefits Information (0171)

1. The **1<sup>st</sup> Program Grouping** field will automatically default to **ELIG**.
2. The **2<sup>nd</sup> Program Grouping** field will automatically default from the personnel area.
3. Click the **Enter** icon.
4. Click **Save**.
5. The *Possible subsequent activities* box will appear. Click the **Enter** button to close the box.
6. The *Enrollment* screen will appear. Click **Get Offer**.
7. From the *Plan* list, choose the correct Plan.
8. Enter the correct **Percentage** amount for the retirement deduction. If you don't know the correct contribution percentage, enter any number in the **Percentage** field, then press the **Enter** button. This generates a message with the correct contribution percentage for the selected plan.
9. Click **Accept**.



**Create General Benefits Information (0171)**

Personnel No. 40000073 Name HOOD KYLE  
PersArea 4050 Dept of Transportation EEGro  
PSubarea 0001 Non Represented EESubgroup 01 Month  
Start 02/01/2015 to 12/31/9999

**General Benefits Information**

Benefit area	US	USA
1st Program Grouping	ELIG	Eligible for Rtrmnt
2nd Program Grouping	01	State Employees

**Enroll**

Name HOOD KYLE on

**Offer selection**

Get offer Print form

Possible offers  
Retirement Enrollmnt 01

**Retirement Enrollmnt**

Enroll Costs Un

Plan  
401(a)  
• PERS 2  
• PERS 3 - Option 0  
• PERS 3 - Rate A - Self  
• PERS 3 - Rate A - WSIB  
• PERS 3 - Rate B - Self  
• PERS 3 - Rate B - WSIB  
• PERS 3 - Rate C - Self  
• PERS 3 - Rate C - WSIB

**Contribution regular**

Pre-tax contribution Semi-monthly

Amount 0.00 USD  Pre-Tax Rollove

Percentage 4.92

Units 0 X

Post-tax contribution Semi-monthly

Amount 0.00 USD

Percentage 0.00

Units 0 X 0.00 USD

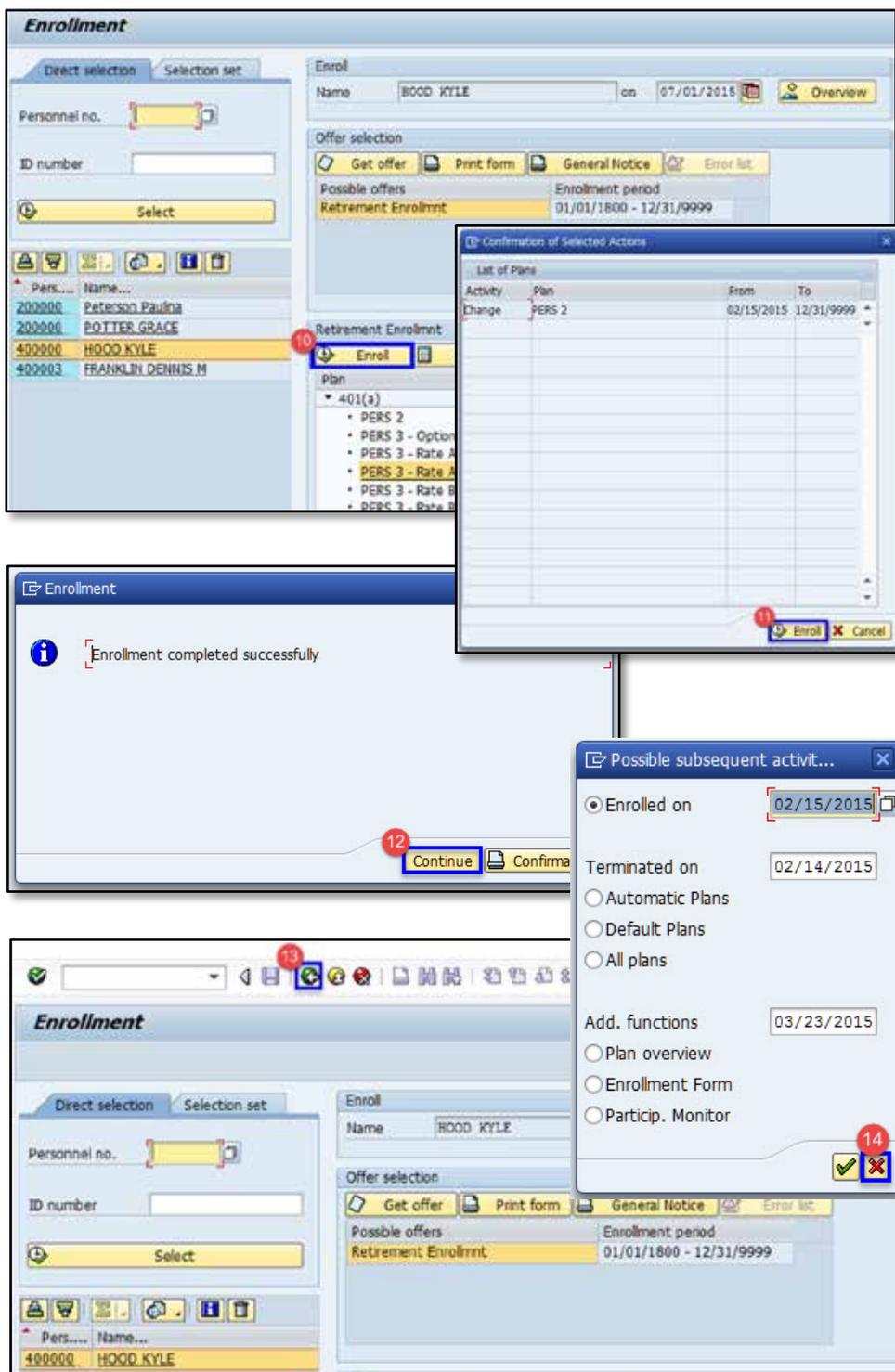
**Note:** For Plan 3 employees transferring between employers (Business Area), choose the appropriate plan (PERS, TRS, or SERSO) with the rate option of 0 (zero) to begin the 90-day choice period. This will place the employee on the 70-day/90 day default report.

## Section 3–For Benefits Processor

*ACTION: Create General Benefits Information (0171), continued*

10. In the *Retirement Enrollment* section of the Enrollment screen, click **Enroll**.
11. The *Confirmation of Selected Actions* screen will appear. Click **Enroll**.
12. The *Enrollment completed successfully* screen will appear. Click **Continue** to go to the *Enrollment* screen (or click **Confirmation** to print the confirmation) and then click **Continue**.
13. Click the **Back** button to return to the previous screen.
14. The *Possible subsequent activities* screen will appear. Click **Cancel** to return to the *Personnel Actions (PA40)* screen.

***Congratulations, you have completed the Appointment Change–Transfer action!***



The screenshots illustrate the following steps:

- Step 10:** The 'Enrollment' screen shows a list of personnel. Kyle Hood (400000) is selected. The 'Enroll' button is highlighted.
- Step 11:** A 'Confirmation of Selected Actions' dialog box appears, listing the enrollment details. The 'Enroll' button is highlighted.
- Step 12:** A message box displays 'Enrollment completed successfully'. The 'Continue' button is highlighted.
- Step 13:** The 'Possible subsequent activities' dialog box is shown, allowing selection of various options. The 'Cancel' button is highlighted.