

POSITION CHANGES/TRANSFERS/UPDATES

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Position Changes and Updates

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Business officers and personnel administrators will use PA40 to handle various position situations for employees. The Action taken on PA40 will depend upon whether the situation involves a **position change** or **position update**.

Position changes include transfers and other changes wherein the employee's position number changes, i.e., the employee is moving from one position to another. All position changes are handled with the **Main Campus Create Assignment** or **Hospital Create Assignment**.

Position updates involve changes in the values or attributes of positions. When an employee occupies a position that is changed, the **Position Update** Action must be executed on PA40. The employee remains in the same position, but the affected attributes are updated on the employee's record.

Tips and Reminders



- Always check with the Compensation Office when an employee transfer involves Payroll area change.
- When employees are changing positions within the same Payroll area, the Start date should be recorded as the **first day** on the new position (any time within the pay period.)
- If employees are transferring and changing Payroll areas, remember to contact the Compensation Office to ensure that the Actions are timed correctly. *If the change is from Biweekly to Monthly*, the Start date is the first day of the next biweekly pay period. *If the change is from Monthly to Biweekly*, the Start date is the first day of the next monthly pay period. When an employee is changing positions/transferring, the position number is changed while the personnel number (PERNR) remains the same.
- In cases of position updates, the Compensation Office or the authorized Budget Officer must update the actual position (PP01).
- The position number does **not** change when a position is updated.
- In transfer situations, the employee's new department has responsibility for carrying out all required processing in IRIS. Sending and receiving departments must communicate carefully in transfer situations.
- The receiving department must update the **Mail Code (org unit)** field to ensure that the pay statement arrives in the correct locale.
- FTE changes affect vacation and TDL accruals, as well as holiday pay calculation.
- The Cost Distribution must be delimited as part of the **Position Change** Action (Infotype 0027) for staff employees and part-time faculty members.
- FES will update the Cost Distribution for full-time faculty members.

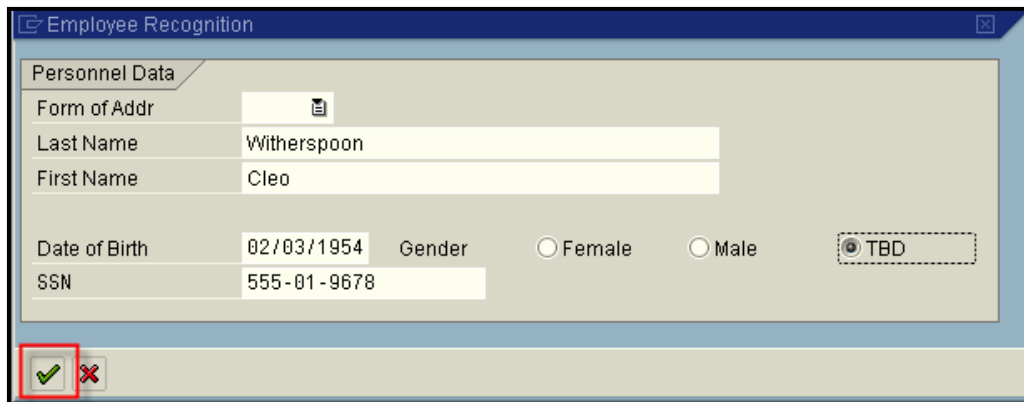
[Instructions for Employee Transfer/Position Change \(PA40\)](#)

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When employees opt to transfer from one position to another one at UK, the business officer or personnel administrator **in the receiving department** will use **PA40** to create the employee's new assignment.

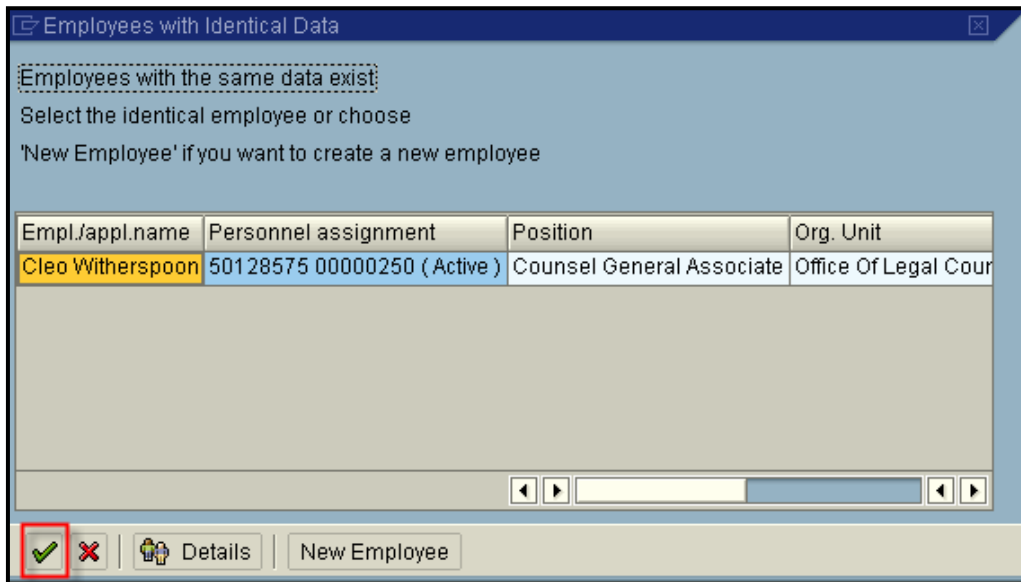
When an employee is transferring to another position, the business officer or personnel administrator in the receiving department should follow these steps:


1. Enter PA40 in the Command field of the SAP Easy Access screen. Make sure the Person ID field is clear when PA40 appears.
2. Select Main Campus Create Assignment or Hospital Create Assignment in the Actions list and enter the Start Date. Click the execute  icon.
3. Enter the employee's information in the Employee Recognition box and continue .



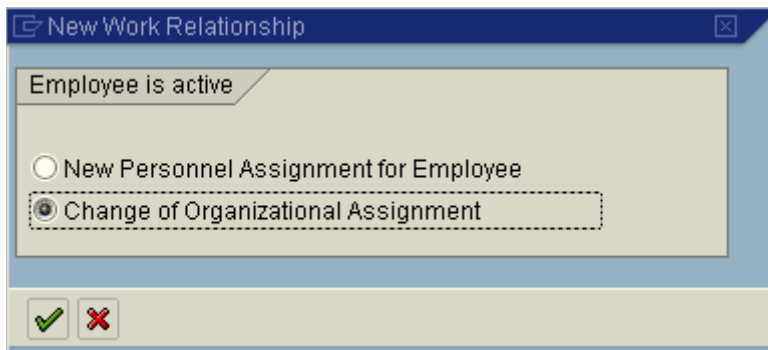
Personnel Data	
Form of Addr	
Last Name	Witherspoon
First Name	Cleo
Date of Birth	02/03/1954
Gender	<input type="radio"/> Female <input type="radio"/> Male <input checked="" type="radio"/> TBD
SSN	555-01-9678

4. The following pop-up box will appear:



5. Click on the employee name and then continue .

6. The system will then prompt for the type of Action you are trying to accomplish. Select the **Change of Organizational Assignment** option.



7. **Copy Actions (0000)** will then be called and appear as follows:

Infotype Edit Goto Extras System Help

Copy Actions (0000)

Execute info group Change info group

Person ID 10025719 Pers.Assgn 00024799 50129828 00024799...

Pers.No. 24799

Name Brent Change of Position Process Empl. % 100.00

EE group A Staff Pers.area 1000 Main Campus

EE subgroup 03 Exempt Monthly Pers. subarea 0001 Reg FT

Start 06/01/2006 to 12/31/9999

Personnel action

Action Type ZF Position Change

Reason for Action

Status

Customer-specific

Employment 3 Active

Special payment

Organizational assignment

Position 50129828 IRIS Project Director

Personnel area 1000 Main Campus

Employee group A Staff

Employee subgroup 03 Exempt Monthly


Additional actions

Start Date	Act.	Action type	ActR	Reason for acti

Notice that the Action Type is **Position Change**.

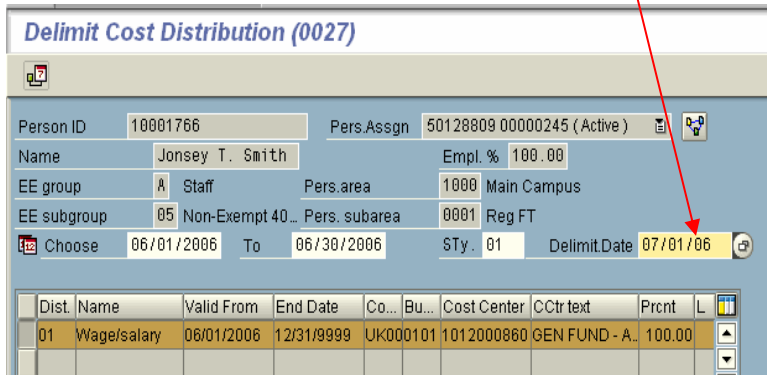
8. Select the appropriate Reason for Action:

- Promotion
- Demotion
- Lateral
- Reduce Hours
- Temp/Student to Regular
- Regular to Temp
- Student to Temp

9. Be sure to **change** the position to the number of the employee's new position. Note that the Personnel Number does **not** change.
10. Save and continue, as with all other Actions. The following Infotypes will be called during the Action:
 - Organizational Assignment
 - 0008 Basic Pay
 - 0014 Recurring Payments/Deductions
11. For staff and part-time faculty position changes, remember to delimit the Cost Distribution (0027). Click on the Delimit  icon.

Highlight the appropriate record to be ended.

Enter the end date in the Delimit Date field. This date should be the day after the true end date. For example, if the end date is 06/30/2006, use 07/01/2006 as the delimit date.



Dist.	Name	Valid From	End Date	Co...	Bu...	Cost Center	CCtr text	Prnt	L
01	Wage/salary	06/01/2006	12/31/9999	UK000101	1012000860	GEN FUND - A.	100.00	100.00	[icon]

12. Click the Delimit  icon. 

13. Hospital Position Changes will also have the following Infotypes:

- 9002 Hospital Salary
- 0024 Skills

Other Position Changes

End-users can follow this same Action process for these change situations:

When an employee is moving from an on-call position to a regular one, carry out this Action, choosing **On-Call to Regular** as the Reason for Action.



Execute this Action when an employee is moving from a regular position to an on-call one, choosing **Regular to On-Call** as the Reason for Action.

[Instructions for Position Updates \(PA40\)](#)

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When the attributes of a position are changed, and the position is filled, a PA40 Action is required to ensure that the employee's assignment is aligned correctly with the position. As an example, if a position undergoes evaluation that results in a new grade or a Payroll area change, a **Position Update** Action is required on PA40. When a position's weekly hours change, resulting in a Personnel Subarea change, this Action is also required.

To carry out the Position Update Action:

1. Enter **PA40** in the Command field of the SAP Easy Access screen.
2. Make sure the Person ID field is clear when PA40 appears.
3. Select **Position Update** or **Hospital Position Update** in the Actions list and enter the Start **Date**. Click the execute  icon.
4. Enter the Person ID or search for employee and then press Enter.
5. **Copy Actions (0000)** will then be called.
6. Record the Reason for Action:
 - Reclassification
 - Title Change
 - Change in weekly hours
7. On **Copy Actions (0000)**, be sure to delete the position from the position field, hit enter, then re-enter the position. This allows the new attributes of the position to default correctly to the employee.
8. Save  and continue, as with all other Actions.




Note: The position must be updated through PP01 before this Action can be executed on the employee assignment.

[Instructions for Change in Base Pay \(PA40\)](#)

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Business officers use PA40 to enter a pay change for an employee. The Action should follow all necessary authorizations/approvals for this change in pay.

To carry out the Change in Base Pay Action:

1. Enter **PA40** in the Command field of the SAP Easy Access screen.
2. Enter the employee's Person ID.
3. Enter the **Start Date** for the change in base pay.
4. Select **Change in Base Pay** in the Actions and click the execute  icon.
5. **Copy Actions (0000)** will then be called.
6. Record the Reason for Action:
 - Equity Adjustment
 - Market Adjustment
 - Mid-year Adjustment
 - Sal-Pro Override
 - Fiscal Year Increase
7. Enter through system messages and save .
8. Enter the new base pay (hourly rate, biweekly salary, or monthly salary) for the employee and press Enter.
9. Enter through system messages and save .
10. Use **ZHR_PAR** to create the PAR, obtain signatures, and forward to Compensation.

[Instructions for Change in FTE \(PA40\)](#)





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Business officers and personnel administrators use PA40 to carry out a **Change of FTE** Action *when the employee's FTE change falls within the defined Personnel Subarea.*

As an example, an employee's FTE currently is set at .80. This FTE falls in the Personnel Subarea 0003 – Reg PT>.74. The employee's FTE needs to be changed to .90, an FTE amount that falls within this particular band. Therefore, the **Change in FTE** Action is the appropriate to execute.

Changes in weekly hours that result in a *different* Personnel Subarea should be handled with the **Position Update** Action.

To carry out the Change in FTE Action:

1. Enter **PA40** in the Command field of the SAP Easy Access screen.
 2. Enter the employee's **Person ID**.
 3. Enter the Start Date for the change in base pay.
 4. Select **FTE Change** and click the execute  icon.
 5. **Copy Actions (0000)** will then be called.
 6. Record the Reason for Action as **FTE Change**.
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1. Enter through system messages and save .
 2. On **Planned Working Time (0007)**, enter the new FTE for the employee, checking to ensure consistency with the Personnel Subarea.
 3. Enter through system messages and save .
 4. On **Basic Pay (0008)**, remember to enter the hourly or monthly rate and save . The hourly rate must be entered, even if there is no change. For salaried employees, you must enter a new salary amount to match the new FTE.
 5. Use **ZHR_PAR** to create the PAR, obtain signatures, and forward to the Compensation Office.