EMPLOYEE DATA

Viewing Employee Data

Information on employees can be accessed and displayed with **PA20 Display HR Master Data.** PA20 presents a group of tabs, with each containing a list of individual Infotypes and Infotype numbers. Security roles determine access to particular Infotypes.

These Infotypes are screens that hold logically grouped information. For example, Infotype 0002 – Personal Data stores First Name, Last Name, Middle Name, Suffix, Known As, SSN, Date of Birth, Gender and Marital Status.

Tips and Reminders

- For a quick search, key an equal sign (=) followed by last name of the employee in the person ID field. To further refine the search, add a period and the first name (example: Smith.John).

- A Person ID that begins with "0000" is an employee record converted from HRS. For converted records, the Person ID and the Personnel Number (PERNR) may be the same value.

- Once inside a transaction, the **Object Manager** section (left side of screen) can be closed or reopened by clicking **Settings** (in the menu bar) and choosing from **Show** or **Hide Object Manager** on the pull-down menu.

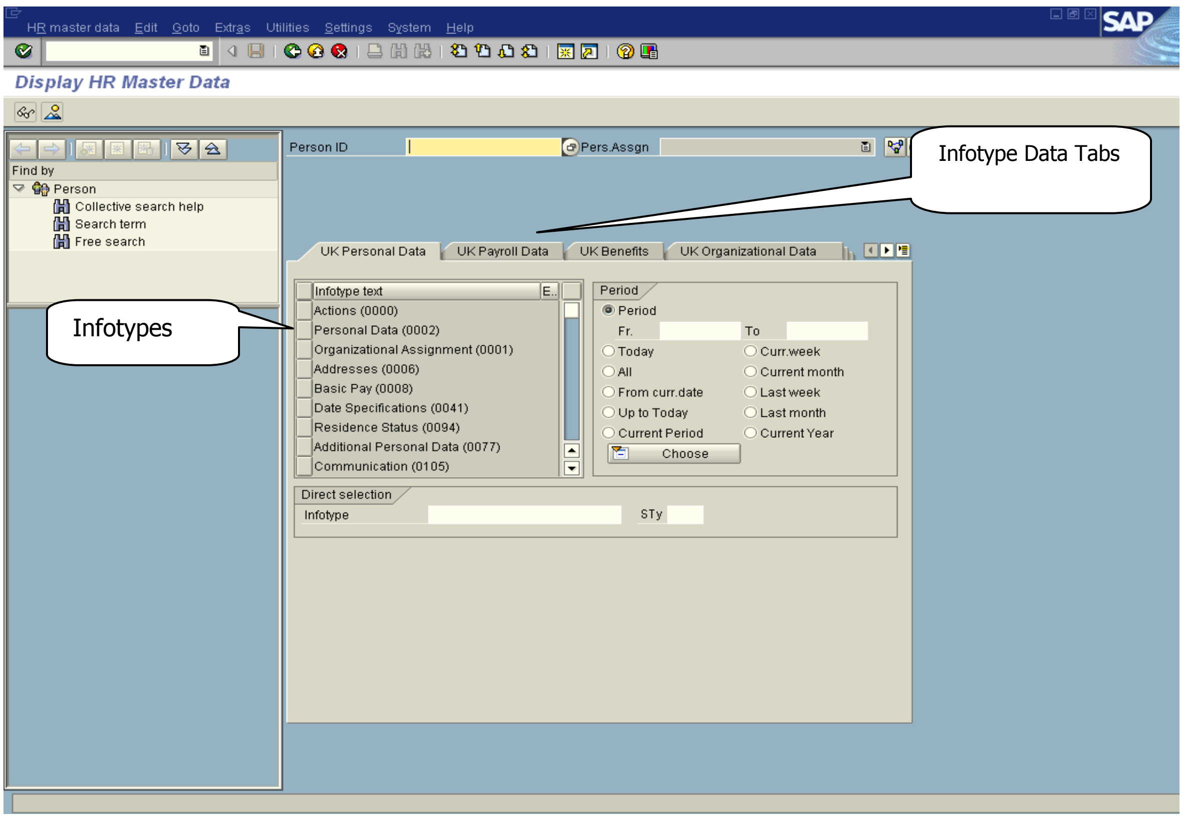
- Always use **PA20** to view data. Viewing through PA30 locks out other users.

- Difference between **Person ID** and **Personnel Number**:
    - Person ID is a unique identifier for the employee and will never change, even if the employee leaves the University and later returns.
    - The Personnel Number ties an employee to a particular position. In the case of multiple assignments, employees will have a separate Personnel Number (PERNR) for each position held.

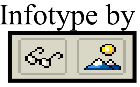
- Information on the Faculty tab includes Primary Academic Appointment, Administrative Appointment, FES control flag, Tenure and Contract Elements. The Faculty Database drives these Infotypes.

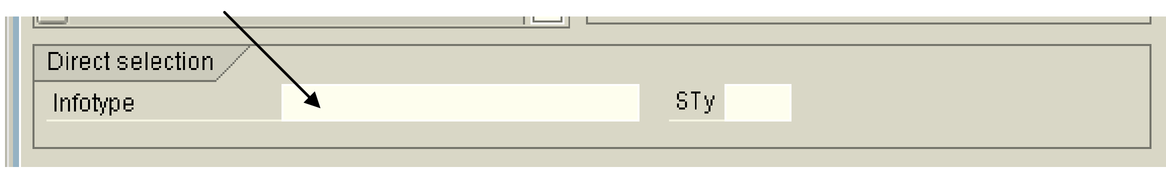
Instructions for Display Master Data (PA20)

1. To view information pertinent to an employee, key **PA20** in the Command field of the SAP Easy Access screen and press Enter.
2. After entering the person ID, or conducting a search for the employee, press Enter key or  to populate the screen with employee data.



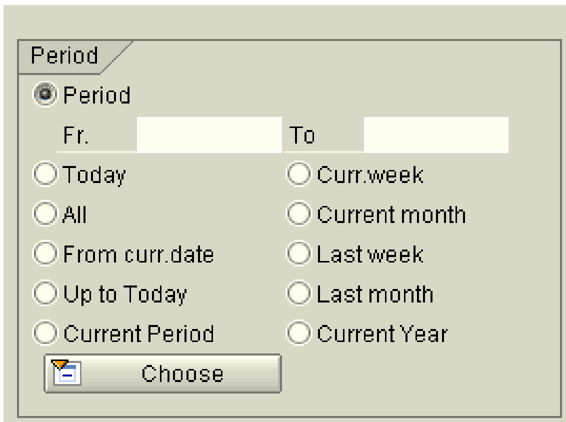
3. To view a list of available tabs, click the list  icon. Select the desired tab from the list or use the directional arrows to the right of the tabs.

   Select an Infotype by clicking on the button to its left, and then choosing the Display or Overview  icon.

4. You may also select by entering the Infotype number in the Direct selection box at the bottom of the screen.
5. 

6. When displaying the Infotype, use  to access individual historical data records (such as previous addresses or name changes).

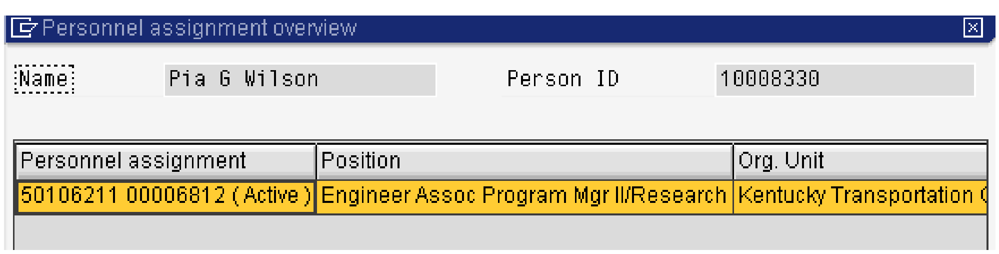
7. When viewing Infotypes, information can be found quickly if selection periods are entered. For example, choose the “All” radio button to see all information contained in an Infotype.



8. When displaying an Infotype, use the  icon to see history of the Infotype. For example, the Overview Addresses (0006) gives address history:

STy.	Start Date	Address	Telephone no.	LI
1	07/05/2007	43 Tates Creek Road	8692693400	
1	01/03/2007	304 East High STreet		
1	01/01/2005	195 Hickory Street	8593697855	

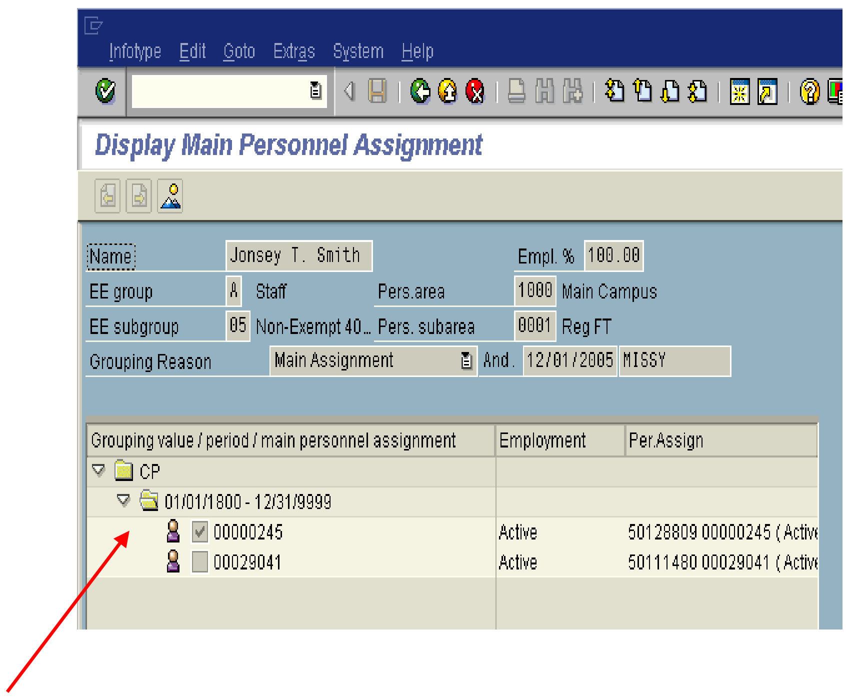
9. Use the  icon to review an employee’s assignment information. Select an individual assignment record to view further details.



Finding the Main Assignment (PA20)

To find an employee's Main assignment:

1. Key **PA20** in the Command field of the SAP Easy Access screen and press Enter.
2. After entering the person ID, or conducting a search for the employee, press Enter or  to populate the screen with employee data.
3. On the UK Compensation tab, select Main Personnel Assignment (0712) by clicking on the button to its left. Next click the Display  icon.



4. The Main Personnel Assignment will be checked. Assignment history can be viewed on this screen.

Troubleshooting with PA20

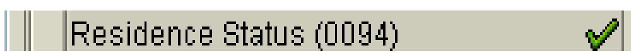
Payroll and Compensation

Payroll Status (0003). View Payroll Status using PA20. The **Pers. no. locked** box will be checked if the Payroll Office has not reviewed the Payroll Authorization Record (PAR) for approval. If this box is checked, the employee will not be paid.

The Payroll correction box will be checked if during the payroll process the <u>system detected an error</u>. If this box is checked, the employee record needs to be corrected before the next payroll run.

The Payroll Office can assist with these kinds of situations.

Residence Status (0094) (I-9 Information). View Residence Status using PA20. If the I-9 information has not been entered, the employee cannot be paid. A green check mark will indicate that the data entry has been completed.



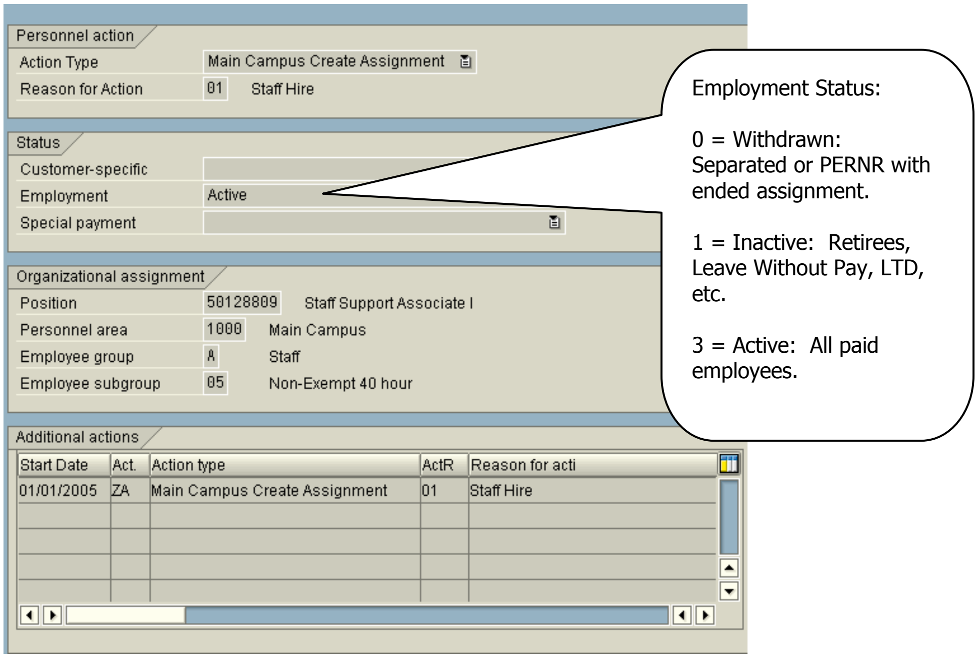
The Compensation Office can assist with this issue.

Compensation Comments (9012). The Compensation Office uses 9012 for recording comments. A green check indicates that there are comments.

Highlight the Infotype and click the display  icon to view.

Additional Infotype Information for Troubleshooting

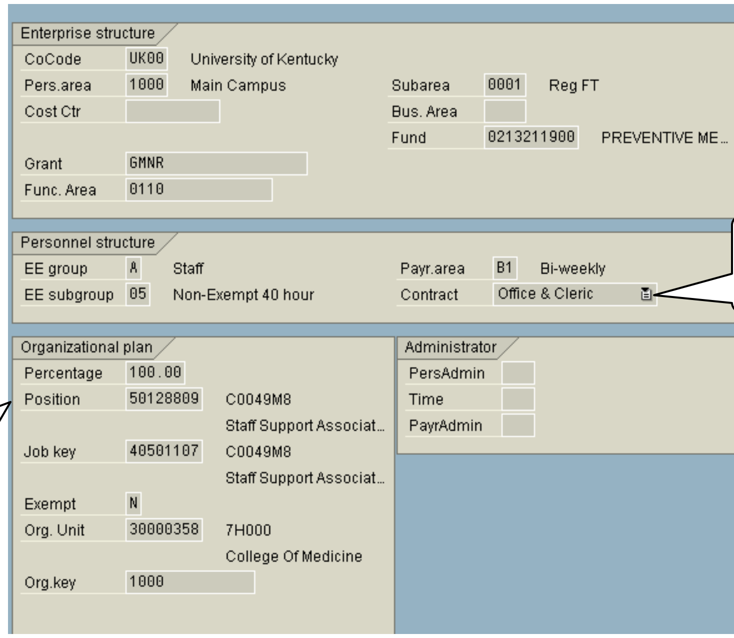
Actions (0000). Provides details on any actions that have been completed.



If the employment status is Inactive, **Basic Pay (0008)** will not process, however, **Recurring Payments (0014)** and **Additional Payments (0015)** will be recognized and will process. Benefits will also go into **arrears**. Prepayment can be arranged prior to leave without pay.

Arrears. If an employee does not earn enough to cover deductions in a pay period or is in an Inactive status, money owed is stored in a "bucket" called Arrears. Every time an employee gets paid, the positive dollars will go against the negative amount stored in the arrears bucket until the balance has been settled.

Organizational Assignment (0001). Provides information about the specific assignment.



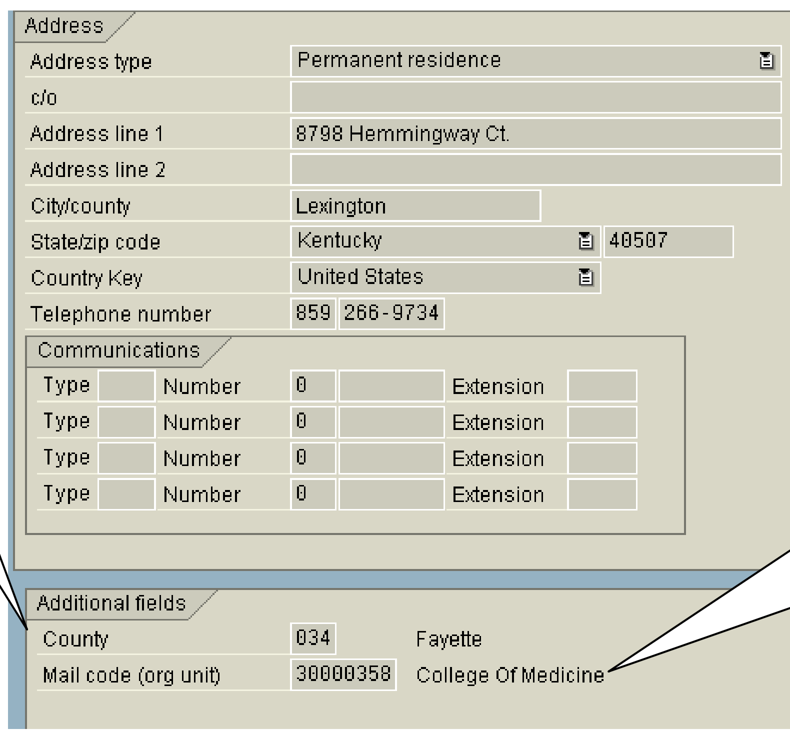
Position numbers:

50XXXXXX: Converted from HRS

51XXXXXX: New position in IRIS.

This field is used in GL mappings.

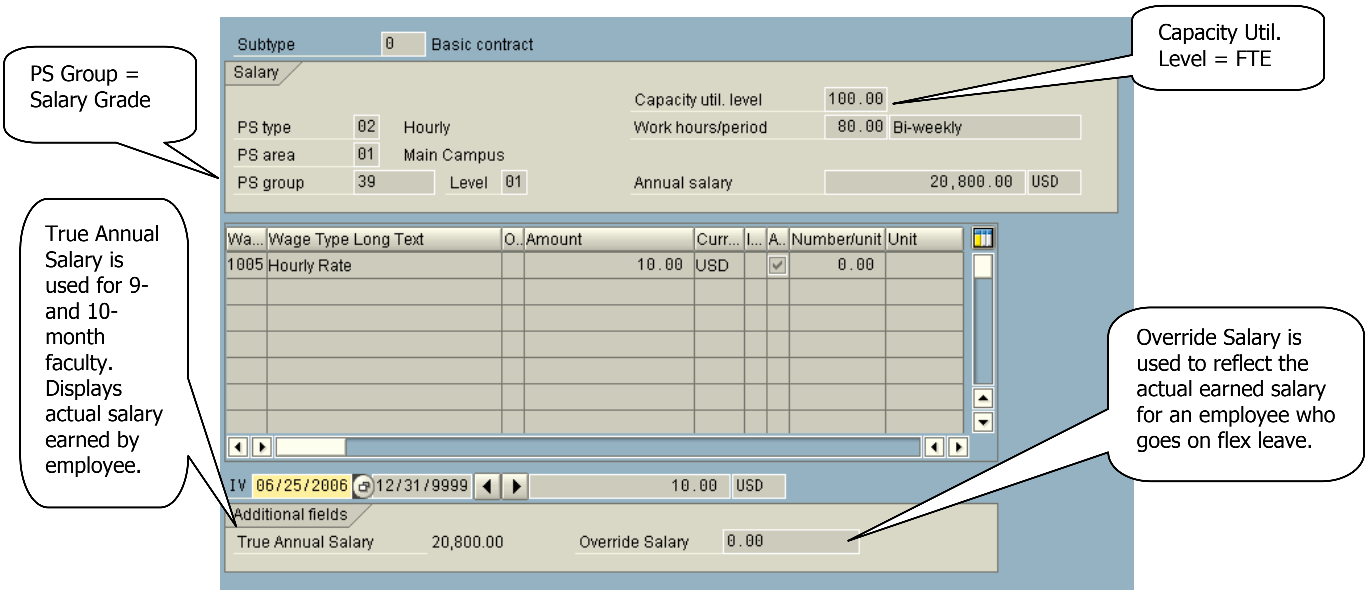
Addresses (0006). Includes information regarding address (org unit) for the employee's pay statement and the employee's county of residence for Benefits purposes.



Employee's county of residence. This code is used to determine health care plan eligibility.

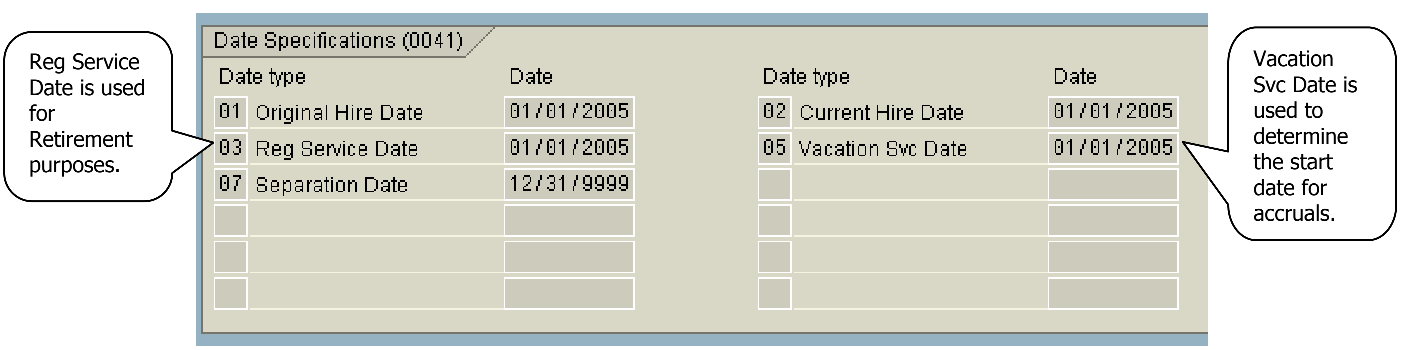
Organizational unit (department) where the employee's pay statement will be sent. Updating this field is the responsibility of the hiring department.

Basic Pay (0008). Provides information regarding the employee's pay amount, FTE, and salary grade.



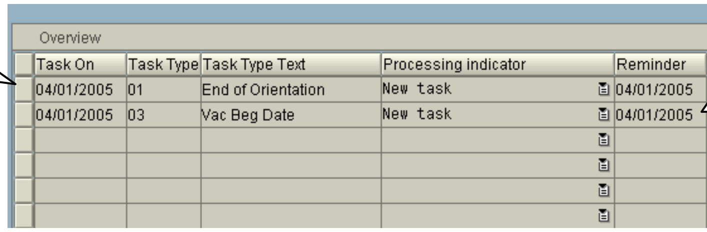
If **Planned Working Time (0007)** is changed, verify that **IT0008** is correct.

Date Specifications (0041). Provides information on key employment dates.
Employee Relations is solely responsible for any changes to Vacation Svc Date.



Monitoring of Tasks (0019): Provides information regarding End of Orientation and vacation begin dates. **Employee Relations is solely responsible for any date changes.**

End of Orientation: End date of new employee 90- day orientation period.



Overview

Task On	Task Type	Task Type Text	Processing indicator	Reminder
04/01/2005	01	End of Orientation	New task	04/01/2005
04/01/2005	03	Vac Beg Date	New task	04/01/2005

Vac Beg Date: First day vacation is available for use. Vacation leave accrues during the orientation period, but balances do not appear on the employee's pay statement until leave is available for use.

This view is displayed by using the  icon.

Maintaining Employee Data

Employee information is maintained in IRIS HR/Payroll by using **PA30 Maintain HR Master Data.** Typical maintenance includes name and address changes, corrections to data, changes to other personal data, as well as changes covering additional payments or planned working time. While numerous Infotypes can be accessed and maintained via PA30, such access is controlled by security role. For example, end-users with the Business Officer role may update addresses, while those users in a Time Entry role may not alter address records.

Other data maintenance occurs through **PA40 Personnel Actions**, where the user is presented with all of the required Infotypes that must be changed or updated to complete certain transactions. For example, when hiring a new employee, certain Infotypes must be completed in order for an employee's record to be processed through payroll properly. Using an Action ensures that all of the required Infotypes are completed.

Tips and Reminders

- Having two sessions open is helpful. Click on the icon at the top of the screen. By having two sessions open, you can research information in one session while making changes in the other.

- Users should only use the Change icon when making an actual data correction. For example, if you misspelled the employee's last name during the hire action, you would use the Change icon to correct the mistake.

- The Create icon results in a new record (old record is delimited). When using the Create icon, the new screen will be a blank record and all information will be entered. When using Create, the start date of the new record will automatically "delimit" previous record, resulting in historical records.

- The Copy icon allows you to update information while maintaining historical data. When copying information, the previous information appears on the screen after you click . **It is very important to change the start date of the record, or you will overwrite the existing record**.

  The Copy function allows you to make a needed change while retaining all correct data. For example, you may need to change one line of a Cost Distribution (0027) with five different lines of cost allocation. With Copy, you only need to change one of the lines, since you are starting with a pre-populated listing.

- Click on HR Master Data in the menu bar to toggle from PA30 (Maintain) to PA20 (display) or PA40 (Personnel actions).

- Always use **PA20 t**o view data. Viewing through **PA30** locks out other users.

- Employee Relations is solely responsible for changing Vacation Service Date, End or Orientation Date, and Vacation Begin Date.

Instructions for Maintain HR Data (PA30)

Address Maintenance (PA30)

Address changes are made using **PA30.** After entering the person ID, or conducting a search for the employee, press the Enter key to populate the screen with employee data.

To change the Permanent address:

1. Click on Addresses (0006) and then choose Create or Copy. (Do not use the icon to create a new address. You will lose the history.)

2. Choose Permanent Residence. 1 Permanent residence

3. Then enter the Start date (the effective date of the new address).

4. Enter the new address information and save.

To create Address subtypes (such as Emergency Contact or Mailing Address):

1. Follow this process, choosing the Create icon. Then select the subtype from the drop-down box.

1	Permanent residence
10	Primary Emergency Contact
11	Secondary Emergency Contact
12	Legal Guardian
5	Mailing address
7	Work Address
8	Power of Attorney
9	Forwarding Address

2. Enter information and save.

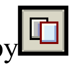
Note: Personnel administrators should send the completed Address/Name Change form to Human Resources for the employee's permanent records.

Mail Code (Pay Statement Distribution Location) (PA30)

Pay statements for employees are routed to the location recorded in the **Mail Code (org unit)** field on Addresses (0006). In some instances, the Mail Code (org unit) may require a change.

To update an employee's pay statement location:

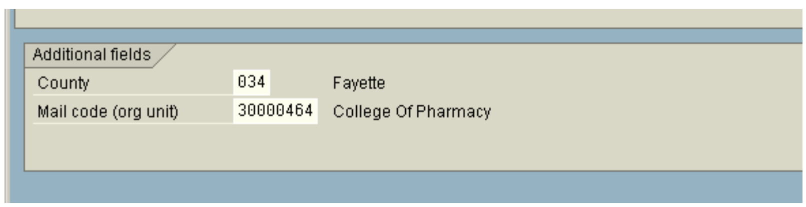
1. Enter the person ID, or conduct a search for the employee, and press the Enter key to populate the screen with employee data.

2. Click on Addresses (0006) and then choose Copy .

   Choose Permanent Residence. 

3. Then enter the Start date (the effective date of change).

4. Click in the Mail Code field in the Additional Fields section of the screen.



5. Key the new **Org Unit** number, presses Enter, and save. If the Org Unit number is unknown, search by using the possible entries  icon.

<u>Name Changes (PA30)</u>

Name changes are made with **PA30.** After entering the person ID, or conducting a search for the employee, press the Enter key to populate the screen with employee data.

To complete the Name Change:

1. Select Personal Data (Infotype 0002).
2. Select the Copy icon. (Do not use the icon to change a name. You will lose the name history.)
3. Change the Start date of the record to coincide with the effective date of the name change.
4. Enter the new name information and save .

Note: Personnel administrators should send the completed Address/Name Change form to Human Resources for the employee's permanent records.

Additional Payments (PA30)

PA30 is used to create an additional payment for an employee. This is a one-time payment that will only occur in the pay period associated with the Date of origin on the Infotype record.

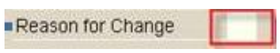
To establish an Additional Payment:

1. After entering the person ID, or conducting a search for the employee, press the Enter key to populate the screen with employee data.

2. Enter 0015 in the Direct selection box at bottom of screen.

3. Click the Create  icon.

4. On Additional Payments (0015), enter the appropriate wage type number, record the amount to be paid, and Date of Origin (date within payroll period in which additional payment is to be made).

   Leave 

 blank. Only Compensation uses this field.

If you want the charges to follow normal payroll distribution, simply save **.**

Proceed below **only** if cost distribution is required.

For payments that require charges to cost centers other than those normally used:

- Next click on the Maintain Cost Assignment  icon on the application toolbar. Check business area and change if needed. Then enter the cost object (cost center, WBS element, or internal order) that will cover the cost of the additional payment.

- If multiple cost centers or WBS elements will be used, each percentage/amount will need to be completed as a separate record. As an example, for a $500 payment to be split equally between two centers:
  1) first record for $250 must be created and saved on one cost center;
  2) then an additional record for $250 must be created and saved on second cost center.

- Then click on Transfer button and save .

5. To complete the Additional Payment process, create the Payroll Authorization Record (PAR), using **ZHR_PAR** to generate the PAR, obtain signatures, and send two copies to the Compensation Office. **Be sure to enter the Reason for Payment in the Comments line!**

Recurring Payments and Deductions (PA30)

PA30 is used to create and apply recurring payments and deductions. The purpose of the transaction is to create a payment or deduction that will affect the employee's pay regularly (per pay period) over a designated period of time.

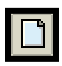
Payroll and Benefits have responsibility for creating and maintaining deduction records.

Business officers and authorized departmental personnel may establish recurring payments such as those for fellowships or additional acting pay.

To Create Recurring Payments:

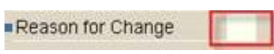
1. After entering the person ID, or conducting a search for the employee, press the enter key to populate the screen with employee data.

2. Enter **0014** in the Infotype field of Direct selection box at bottom of screen.

3. Click on the Create  icon.

4. Record the **Start** Date and **End** Date (if known). If **End** Date is unknown, leave system default of 12/31/9999. With the default, the payment or deduction continues indefinitely.

5. Next enter the **Wage Type** number and amount.

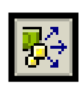
   Leave 

blank. Only Compensation uses this field.

If you want the charges to follow normal payroll distribution, simply save .

Proceed below **only** if cost distribution is required.

The following information is for payments that require charges to cost centers other than those of normal payments to the employee.

- Next click on the Maintain Cost Assignment  icon on the application toolbar. Check business area and change if needed. Then enter the cost object (cost center, WBS element, or internal order) that will cover the cost of the additional payment.

- If multiple cost centers or WBS elements will be used, each percentage/amount will need to be completed as a separate record. As an example, for a $500 payment to be split equally between two centers:

  1) first record for $250 must be created and saved on one cost center;

  2) then an additional record for $250 must be created and saved on second cost center.

- Then click on **Transfer** button and save.

6. To complete the Additional Payment process, create the Payroll Authorization Record (PAR), using **ZHR_PAR** to generate the PAR, and obtain signatures. Send two copies of the PAR to the Compensation Office.

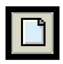
Cost Distribution Creation/Change (PA30)

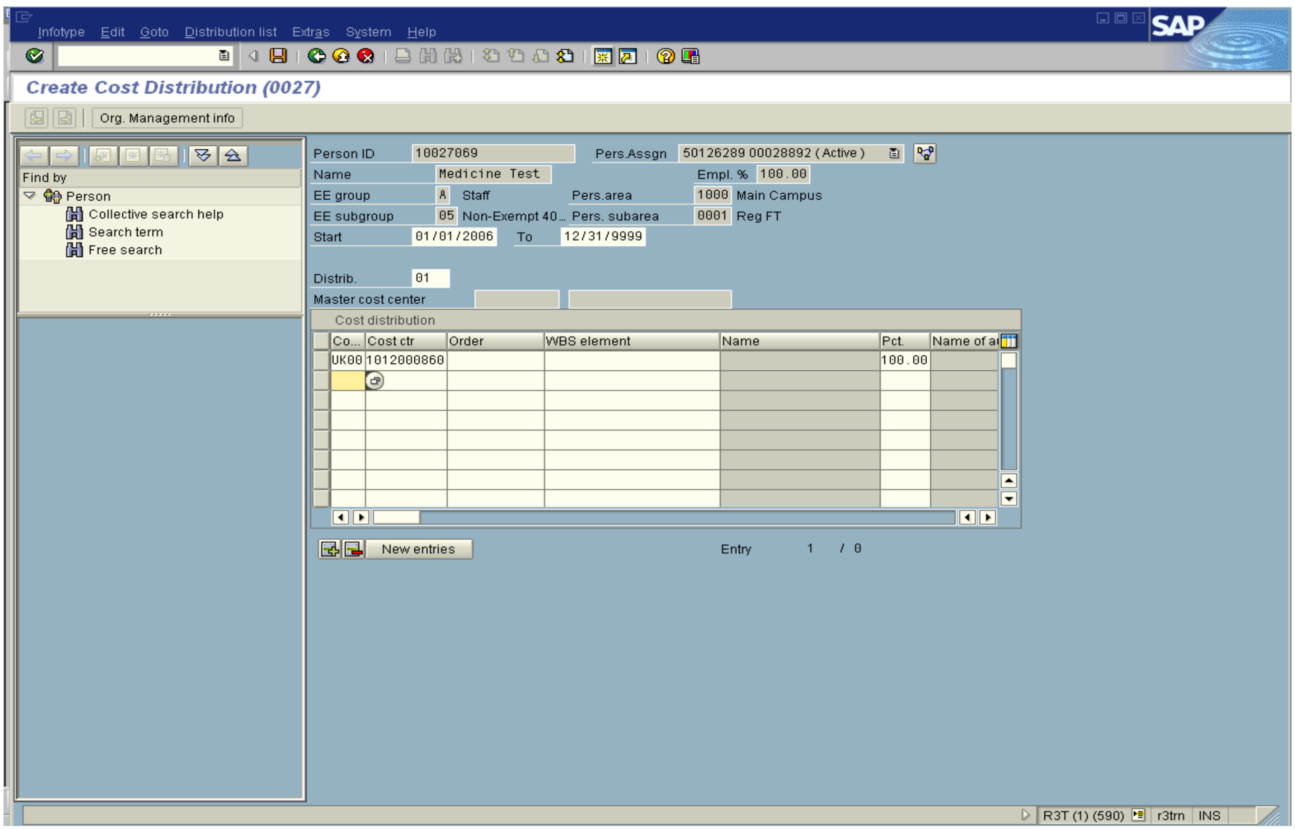
Creation and change of cost distribution for payroll purposes is accomplished through **PA30**, using **Create Cost Distribution** (**0027)**. The Business Officer role includes the ability to create and maintain cost distribution for staff and student employees, as well as part-time faculty members. Cost distribution records for the full-time faculty are updated by FES processes.

To create or change a Cost Distribution:

1. After entering the person ID, or conducting a search for the employee, press the Enter key to populate the screen with employee data.

2. Enter 0027 in the Direct selection box at the bottom of the screen.

3. Then click the Create  icon. The Cost Distribution screen will appear.



4. In the Start field, enter the first day the distribution is effective. If an end date is known, enter in the To field.

5. Enter 01 for Wage/Salary in the Distrib field.

6. In the Cost Distribution section, the first field is for Company Code – always UK00.

7. Next enter the appropriate cost object – either Cost Center or WBS element.

8. Enter the distribution percentage in the **Pct.** Field. Distribution percentage is entered on the left side of the decimal. For example, 50 percent is recorded as **50.00.**

    10. Enter and save .

Note: The distribution on the 0027 record should always total to 100 percent.

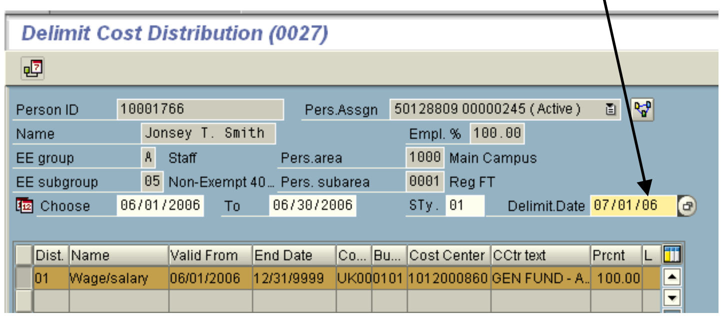
Delimit Function (end an Infotype)

1. Choose the appropriate Infotype on **PA 30**.

2. Click on the Delimit  icon.

3. Choose the appropriate record to be ended.

4. Type 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 06/30/2007, use 07/01/2007 as the delimit date.



5. Click the Delimit  icon.

Troubleshooting with PA30

- An attribute change on a position does not update an employee’s record if the position is filled. The employee’s records should be updated via PA40.

- **Create Basic Pay (0008)** must exist for all employees even if the amount on the record is $0.

- Using the overview  icon will show the historical records of each Infotype.

- **Main Personnel Assignment (0712)** can be used to find which assignment is considered “main” or “prime”.