

# Dual Hire

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### By Infotype

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# Overview

There are several things you will need to determine before processing a dual hire action. This guide should be used in conjunction with the [Pre-Transaction Checklist](#) to ensure that all known exceptions are accounted for. Consult with a specialist if needed.

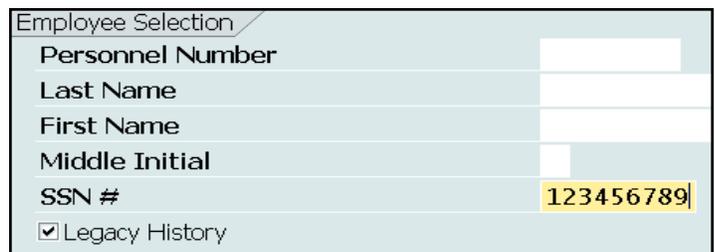
## 1. Has the employee ever worked for the Commonwealth? To find out:

On the home screen of SAP, under the Reporting folder, double-click  
**Y\_DC1\_32000406—Employee Locator**



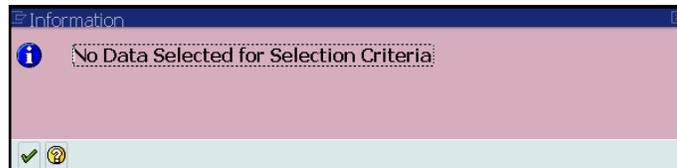
Enter the employee's SSN.

Check **Legacy History** to narrow the search.



Click Execute 

If the employee has no records in SAP, the following message will appear:



Click 

Wait! You still need to check the [Employment History Application](#) to determine if the employee worked for the Commonwealth prior to the implementation of SAP.

Log on using your Oracle username and password.

<http://oais.state.pa.us/ethistory/Login.asp>

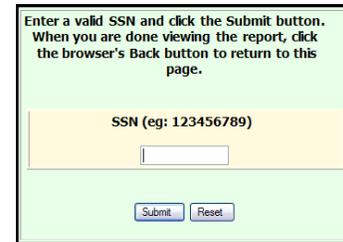
Click the SSN button and enter the employee's SSN.



If you get results with either of these searches, that means the employee has prior Commonwealth history and already has an employee number. You will need to process the transaction as a rehire. If the existing employee number is not valid in SAP, you will first need to process an [Establish IPPS Employee](#) action, and then the new hire action. Otherwise, consider it a true new hire action. Consult with a specialist if needed.

## 2. Does the employee have history with SERS (SERS footprint)?

Log in to the SERS website, input the employee's SSN  
<http://sers.pa.gov>



If **yes**, enroll in "Full Cov Class AA".

If **no**, enroll in "CLS A3/A4".

Regardless of the job class or retirement eligibility, if there is a footprint, **enroll in SERS.**

## 3. Is the employee transferring from an independent agency?

If **no**, the new hire effective date should be the first day the employee reports to work.

If **yes**, and the break in service is less than 14 days, the new hire effective date is the Saturday after their last day worked at the independent agency; unless their last day worked was mid-week, in which case the effective date would be the first day they report to work at the new agency (typically a Monday). **If the EE separates from an Independent Agency and does NOT start the following Monday, please consult with a specialist or supervisor before processing the action. Each case will need reviewed separately.**

If **yes**, and the break in service is more than 14 days, the new hire effective date should be the first day the employee reports to work.

**Independent Agencies** (click [here](#) for a list of agency contacts)

|  |  |
|--|--|
| Attorney General                         | PA Higher Education Assistance Agency  |
| Auditor General                          | Philadelphia Port Authority            |
| Health Care Cost Containment Council     | Senate                                 |
| House of Representatives                 | State Public School Building Authority |
| Independent Regulatory Review Commission | State System of Higher Education       |
| Joint State Government Commission        | Thaddeus Stevens College of Technology |
| PA Gaming Control Board                  | Treasury                               |

**4. Is a ZT Date needed?** If there is no break in service in both positions, the ZT date should reflect the date of hire of the first position. If there is a break in service greater than 180 days, there would be no ZT date added. If a ZT date is needed you must create a [CRM](#) ticket to Employee Services to inform them that a ZT date has been placed on the employee's record and that their benefits need reviewed. **NOTE: PA National Guard, Non Commonwealth Travelers and Deputy Wildlife Conservation Officer (Volunteer) Dual Hires do NOT get a ZT date.**

Remember to verify the Union Local Code before processing the action; click [here](#) for instructions.

**5. Non-Commonwealth Travelers**—All Non-Commonwealth Travelers, that never held a regular commonwealth position, should be processed as a Dual Hire. If the employee held a regular position, then separated and rehired into a non-commonwealth traveler position escalate to a specialist to follow the normal procedure.

A Non Commonwealth Traveler is a person who is appointed by the Governor to serve on a board. We cover their travel expenses. While serving as a Non-Commonwealth Traveler they are not considered a Commonwealth Employee.

## *When to Use a Payrate Exception (appt above min)*

A payrate exception is to be used at the start of the dual hire action when an employee is given a salary that is above the established minimum for a particular job class.

### **IT0008**

When a payrate exception is selected, SAP will lock IT0008 once the salary is input; this triggers a notification to BCPO to review the action and confirm that the employee is being paid at the correct salary. Once BCPO approves or rejects the salary, you will receive a notification via email and IT0008 will be unlocked.

The agency will typically indicate on the PAR if the action is an appointment above the minimum.

You will need to use a payrate exception for any of the following scenarios:

- Employees being hired into DMVA or PEMA, with a work schedule that starts with either 'BAK' or 'BC'.
  - If the Pay Scale Group is any of the following:
    - ◇ AG99—attorney general senior mgmt staff
    - ◇ DS01—deputy secretaries
    - ◇ IP99—PSERS investment staff
    - ◇ PA—port authorities groups 1-11
    - ◇ VR01—DPW resident workers
    - ◇ XD98—board members/civil service hearing officers
    - ◇ XH98—instructors, JROTC, etc.
    - ◇ XH99—senior level staff classes
- For these pay scale groups, an hourly rate will need input on IT0008*
- If the Pay Level on the PAR is '00', 'ZN', 'ZI', or 'ZF'.
  - Corrections Officer Trainees in SCI Graterford or SCI Chester (truncated position).
  - For senior-level appointments, there **must** be written authorization for an above-the-minimum appointment attached to the PAR. If there is not, contact the agency. In most cases, BCPO will not approve this type of payrate exception without written approval.
  - There are other instances where you will use a payrate exception, based on job class or agency. Be sure to review the PAR carefully and confirm with the agency.

### **IT0168**

If a payrate exception is used, IT0168 may be presented during the action; input the annual salary in the *Salary Override* field during the action and save. You will need to manually remove the salary via PA30 after IT0008 has been unlocked by OA Salary & Time.

**Note:** for employees between ages 70 or older, SAP will automatically cap their coverage at a certain amount; a salary override will not be necessary.

## Transaction—PA40

Once you have gone through the [Pre-Transaction Checklist](#) and determined all pre-transaction criteria, you are ready to start the action. In this example, the employee is being hired into a permanent position within the Dept of Corrections effective Monday 4/16/12, in the Z1 pay area, at an appointment above the minimum.

**Health Care Reform-Before you begin** please review the **Health Care Reform Transaction Manual** for information on updating the employee's IT9010.

**1** On the home screen of SAP, under the Personnel Administration folder, double-click **PA40—Personnel Actions**.

**2** Enter the effective date and select **Dual Hire**.

**Note:** Corrections employees who live or work more than 50 miles from the Elizabethtown Training Academy may start on a Sunday, to include travel time. The agency must provide some reference on the PAR to using a Sunday effective date for travel. Contact the agency to confirm this date. Otherwise, the effective date should be Monday.

Click Execute 

Enter the employee's SSN.

Click

**3** **INFOTYPE 0000**  
Enter the action reason.

**01** = standard payrate

**02** = payrate exception/appointment above the minimum (*indicated on the PAR*)

**ANNUITANTS—On rare occasion if an employee simultaneously holds two different annuitant positions then you will not be given the option to use 81, and should then use reason code 01 or 02.**

Enter the position number from the PAR.

**Enter the Reference Pers. Nos.**

Click Enter 

Save 

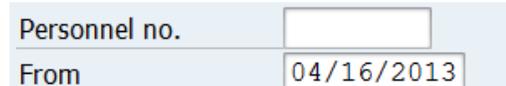
Pop-up: you will be informed that all other fields will default from the position.

**You can't maintain text on IT0000 for a**

Click  **Dual Hire.**



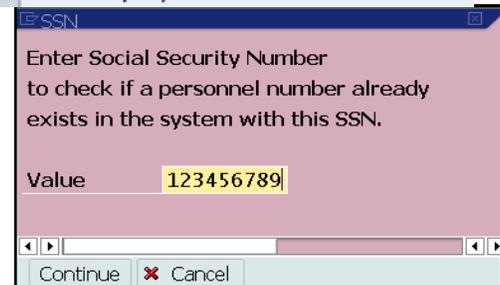
Navigation tree showing 'Personnel Administration' selected, with sub-items: PA20 - Display HR Master Data, PA30 - Maintain HR Master Data, and PA40 - Personnel Actions.



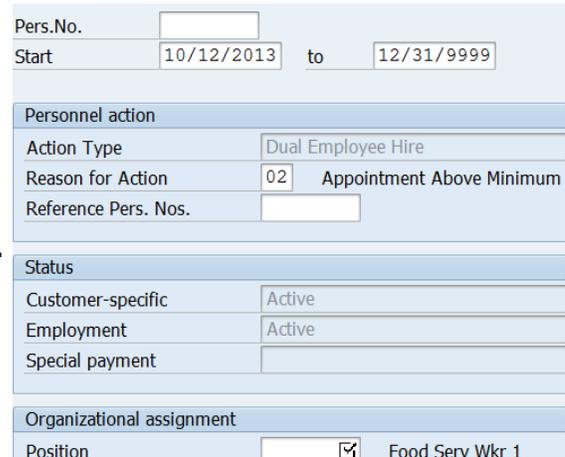
Personnel no.   
From 04/16/2013



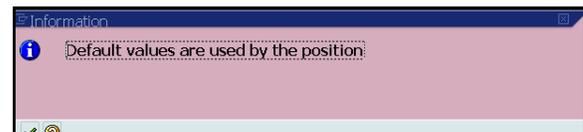
Personnel Actions  
Action Type  
New Hire  
Rehire  
Dual Employee Hire



Enter Social Security Number to check if a personnel number already exists in the system with this SSN.  
Value 123456789  
Continue Cancel



Pers.No.   
Start 10/12/2013 to 12/31/9999  
Personnel action  
Action Type Dual Employee Hire  
Reason for Action 02 Appointment Above Minimum  
Reference Pers. Nos.   
Status  
Customer-specific Active  
Employment Active  
Special payment  
Organizational assignment  
Position   Food Serv Wkr 1



Information  
Default values are used by the position!

# 4

## INFOTYPE 0023

When a payrate exception is used, this Infotype will be presented next.

If there is documentation of previous employment attached to the PAR, enter the information; if not, simply maintain the following text:

PAR Access Code: [123456789](#)

Request to process dual hire action effective 4/16/12  
Payrate exception reason code used per job class

Your Name, HRSC  
Date

Click Enter   
Save 

|                          |                          |                          |            |
|--------------------------|--------------------------|--------------------------|------------|
| Start                    | 04/16/2012               | to                       | 12/31/9999 |
| Other/previous employers |                          |                          |            |
| Employer                 |                          |                          |            |
| City                     |                          |                          |            |
| Country Key              | <input type="checkbox"/> | <input type="checkbox"/> |            |
| Previous Salary          |                          |                          |            |
| Previous Salary          | *****                    |                          |            |
| Prev. Employer Doc       |                          |                          |            |

# 5

## INFOTYPE 0001

Enter the **Time Code** per the PAR in the **PayAdmin field**, enter 'BCP'.

Confirm the **Pay Area**  
(DPW, DOT and L&I have two pay areas).  
Change the pay area if needed.

Maintain text.

Click Enter   
Save 

|                      |            |                    |               |        |             |           |
|----------------------|------------|--------------------|---------------|--------|-------------|-----------|
| Start                | 04/16/2012 | to                 | 12/31/9999    | Chng   | 04/10/2012  | P00444198 |
| Enterprise structure |            |                    |               |        |             |           |
| CoCode               | COPA       | COMMONWEALTH OF PA |               |        |             |           |
| Pers.area            | 11         | Corrections        | Subarea       | HH11   | PSCOA H1 OT |           |
| Cost Ctr             | 11PYRLDFLT | PAYROLL DEFAULT    | Bus. Area     | 11     | Corrections |           |
| Personnel structure  |            |                    |               |        |             |           |
| EE group             | P          | Permanent          | Payr.area     | Z1     | Pay Group 1 |           |
| EE subgroup          | F8         | Full-time 80       | Contract      | Salary |             |           |
| Organizational plan  |            |                    |               |        |             |           |
| Percentage           | 100.00     |                    |               |        |             |           |
| Position             | 00252930   | 47200              |               |        |             |           |
| Job key              | 00472000   | 47200              |               |        |             |           |
| Org. Unit            | 00113500   | CRGRA3500          |               |        |             |           |
|                      |            |                    | Administrator |        |             |           |
|                      |            |                    | PersAdmin     |        |             |           |
|                      |            |                    | Time          |        |             |           |
|                      |            |                    | 554           |        |             |           |
|                      |            |                    | PayAdmin      |        |             |           |
|                      |            |                    | BCP BCPO      |        |             |           |
| CR SCI Graterford    |            |                    |               |        |             |           |

# 6

You will be asked to delimit the position's vacancy the day before the effective date;

Click

# 7

## INFOTYPE 0007

Enter the work schedule per the PAR.

Use the matchcode to select the time mgmt status (*typically on the PAR*).

### Time Mgmt Status:

**0** for per diem employees, National Guard, Health Registrars

**1** for non-perm employees (even if their work schedule begins with 'CMR')

**7** for DOT employees with a work schedule that begins with 'CMR' and for Game Commission employees assigned as Wildlife Conservation Officers

**9** for permanent employees (wage OR salary)

**Note:** *There are exceptions to the Time Mgmt Status; review the PAR carefully, consult with a specialist if needed.*

**Game Commission**—Employees assigned to the Wildlife Conservation Officer job (60110) are considered quasi-positive time reporters which means they are expected to enter attendance time in CATS. In cases where no entry is done, SAP will pay the base hours according to the work schedule. The TMS code on IT0007 should reflect **7**. This information will be provided in the comments field of the EPAR.

Click Enter   
Save 

|                      |                                      |              |            |                    |                   |
|----------------------|--------------------------------------|--------------|------------|--------------------|-------------------|
| EE group             | P                                    | Permanent    | 11         | Corrections        | CR SCI Graterford |
| EE subgrp            | F8                                   | Full-time 80 | HH11       | PSCOA H1 OT        | Corr Ofc Trn      |
| Start                | 04/16/2012                           | To           | 12/31/9999 |                    |                   |
| Work schedule rule   |                                      |              |            |                    |                   |
| Work schedule rule   | BB478015                             |              |            |                    |                   |
| Time Mgmt status     | 9 - Time evaluation of planned times |              |            |                    |                   |
| Working week         | Working week Sunday                  |              |            |                    |                   |
|                      |                                      |              |            | Additional time ID | 01                |
| Working time         |                                      |              |            |                    |                   |
| Employment percent   | 100.00                               |              |            |                    |                   |
| Daily working hours  | 0.00                                 |              |            |                    |                   |
| Weekly working hours | 0.00                                 |              |            |                    |                   |
| Monthly working hrs  | 0.00                                 |              |            |                    |                   |
| Annual working hours | 0.00                                 |              |            |                    |                   |
| Weekly workdays      | 0.00                                 |              |            |                    |                   |

### Remove the '01' Additional Time ID for:

- ALL DOT employees (unless work schedule begins with 'CPE')
- ALL DPW employees in:

*Selinsgrove*

*South Mountain Restoration Center*

**Currently Restoration Aides at South Mountain Restoration Center should NOT be coded as FTE employees.** We will let you know when this changes.

- ALL DMVA employees in:

*Delaware Valley Veterans Home*

*Gino J. Merli Veterans Center*

*Hollidaysburg Veterans Home*

*PA Soldiers and Sailors Home*

*Southeastern Veterans Center*

*Southwestern Veterans Center*

unless work schedule is **BNOHR**

- Effective **December 4, 2016** DOC Laurel Highlands (00114600) and DOC Somerset (00117600 and 00117609) will go live with FTE. **This only impacts BU H1—Correction Officer Trainees, Corrections Officer 1 and Corrections Officer 2 and BU H3—Corrections Of-ficer 3 and Corrections Officer 4**

# 8

## INFOTYPE 0552

Save this screen for BU-covered employees, EXCEPT:

CIVEA union (Corrections), PSEA/NEA union (L&I) (create a ZC date effective the new hire date on IT0041).

BYPASS for:

- management employees
- unclassified employees
- confidential employees
- bargaining units **L1, E4 or E7**

Verify the job code matches IT0001.

Click Enter   
Save 

|  |            |               |            |             |
|--|------------|---------------|------------|-------------|
| EE group                                 | P          | Permanent     | 11         | Corrections |
| EE subgrp                                | F8         | Full-time 80  | HH11       | PSCOA H1 OT |
| Start                                    | 04/16/2012 | To            | 12/31/9999 |             |
| Time specifications/employment period    |            |               |            |             |
| Time spec.                               | JOB        | Job Seniority |            |             |
| <input type="checkbox"/> Do not evaluate |            |               |            |             |
| Duration of validity period              |            |               |            | Imputable   |
| Years                                    | 0          | Months        | 0          | Years       |
| Months                                   | 0          | Days          | 0          | Months      |
| Days                                     | 0          |               |            | Days        |
| Comments                                 |            |               |            |             |
|  |            |               |            |             |
| Additional fields                        |            |               |            |             |
| Job                                      | 472000     | Corr Ofc Trn  |            |             |

**Note:** management employees do not earn seniority, and therefore should **not** be classified as confidential. Check the position to ensure the confidential box is unchecked.

# 9

## INFOTYPE 0105

Verify the ID number matches the employee number.

There is no need to click 'save,' as you will be advanced to the next screen.

Click Enter 

|                      |            |                             |            |             |
|----------------------|------------|-----------------------------|------------|-------------|
| EE group             | P          | Permanent                   | 11         | Corrections |
| EE subgrp            | F8         | Full-time 80                | HH11       | PSCOA H1 OT |
| Start                | 04/16/2012 | to                          | 12/31/9999 |             |
| Communication (0105) |            |                             |            |             |
| Type                 | 0001       | System user name (SY-UNAME) |            |             |
| ID/number            | P00692285  |                             |            |             |

**INFOTYPE 0041**

**Z1** and **Z2** dates are the date of the Dual Hire. **Z6** date should be the same as the original hire date of the employee's primary EE# **unless** they are part of the PA National Guard or a Non Commonwealth Traveler then the original hire date should be that of the Dual Hire

**ZT Date**—If there is no break in service in both positions, the ZT date should reflect the date of hire of the first position. If there is a break in service greater than 180 days, there would be no ZT date added. **Non Commonwealth Travelers and PA National Guard do not get a ZT date.** If a ZT date is needed for , you must create a [CRM](#) ticket to Employee Services to inform them that a ZT date has been placed on the employee's record and that their benefits need reviewed.

Effective March 11, 2013, for all bargaining units with **signed** collective bargaining agreements, the Z3 (longevity) and ZB (increment) date will default with a new date on IT0041, EXCEPT for:

- Corrections (H1) - 5 yrs from eff date
- Capitol Police (L4) - 5 yrs from eff date
- State Police (L1) - 5 yrs from eff date
- Game Commission (K8) - 8 yrs from eff date

Any bargaining units with **unsigned**

collective bargaining agreements will continue to reflect a Z3 or ZB date of 12/31/9999 (refer to [PA Alert 2013-06](#)).

**Note:** For DOC (H1), Capitol Police (L4), PSP (L1), PGC (K8) and LCB, continue to change the ZB date to the 1st day of that month of the following year.

For H1 (Corrections), if the employee is part-time and works 50% of the time, Z3 date is 10 years from new hire date. If

the employee works 80%, Z3 date is 6 years, 3 months from new hire date (*PAR should indicate*).

Enter the Z8 date for Performance Cycle 'A' only, which is always the 1st day of that month of the following year (*ex. effective date = 4/16/12, Z8 date = 4/1/13*).

**Note:** for DEP only, use the Z8 date as specifically indicated on the PAR.

Bargaining units **L1, E4 or E7** use a ZC date, which will default on IT0041.

For non-permanent employees who are eligible for retirement, input a ZW date with the new hire effective date. Refer to page 2 of the [Dates and Definitions](#) document for more information on ZW dates.

|                            |                 |                       |             |                           |
|----------------------------|-----------------|-----------------------|-------------|---------------------------|
| EE group                   | P Permanent     | 11                    | Corrections | CR SCI Graterford         |
| EE subgrp                  | F8 Full-time 80 | HH11                  | PSCOA H1 OT | Corr Oftr Trn             |
| Start                      | 04/16/2012      | to                    | 12/31/9999  | Chng 04/10/2012 P00444198 |
| Date Specifications (0041) |                 |                       |             |                           |
| Date type                  | Date            | Date type             | Date        |                           |
| Z1 Current Service date    | 04/16/2012      | Z2 Adj Leave Service  | 04/16/2012  |                           |
| Z3 Longevity Date          | 04/16/2017      | Z6 Original Hire Date | 04/16/2012  |                           |
| Z8 Annual EPR Date         | 04/01/2013      | ZB Annual Increment   | 04/01/2013  |                           |

**Remember:** IF transferring from an independent agency, and:

Break in service is less than 14 calendar days

Z1 & Z2 = date of hire at losing agency

Break in service is between 14 & 180 calendar days

Z1 = date of hire at losing agency

Z2 = date of hire at gaining agency

Break in service is more than 180 calendar days

Z1 & Z2 = date of hire at gaining agency

Z6 date is always date of hire at the losing agency

**No Z3 date** for DPW Energy Assistance Workers unless otherwise indicated on the PAR.

Click [here](#) for a complete list of dates and definitions.

Refer to [MD540.7](#) regarding EPR cycles.

Click Enter   
Save 

# 11

## INFOTYPE 0008

For a standard payrate, verify the **Pay Scale Group** and **Level**.

For payrate exceptions, you will be able to change the **Pay Scale Group Level**, and/or the hourly rate (*IT0008 will lock*).

In this example, change the level to 'BA' per what is listed on the PAR.

Maintain text.

A salary override is required for the following pay scale groups:

- AG99—attorney general senior mgmt staff
- DS01—deputy secretaries
- IP99—PSERS investment staff
- PA—port authorities groups 1-11
- VR01—DPW resident workers
- XD98—board members/civil service hearing officers
- XH98—instructors, JROTC, etc.
- XH99—senior level staff classes

Use [pay schedule chart](#) to find the hourly rate.

|  |                     |              |              |             |                                       |
|--|---------------------|--------------|--------------|-------------|---------------------------------------|
| EE group   | P                   | Permanent    | 11           | Corrections | CR SCI Graterford                     |
| EE subgrp  | F8                  | Full-time 80 | HH11         | PSCOA H1 OT | Corr Ofr Trn                          |
| Start  | 04/16/2012          | to           | 12/31/9999   |             |                                       |
| Subtype 0 Basic contract   |                     |              |              |             |                                       |
| Pay scale  |                     |              |              |             |                                       |
| Reason   |                     |              | Cap.util.lvl | 100.00      |                                       |
| PS type  | C0                  | C0 and FSE   | WkHrs/period | 80.00       | Bi-weekly                             |
| PS Area  | CW                  | Commonwealth |              |             |                                       |
| PS group   | C034                | Level        | BA           | Ann.salary  | 34,593.00 USD                         |
| Wag. Wage Type Long Text O Amount Curre. In. A. Number/Unit Unit |                     |              |              |             |                                       |
| 1100   | Regular Hourly Comp |              | 16.58        | USD         | I <input checked="" type="checkbox"/> |
|  |                     |              |              | USD         | <input type="checkbox"/>              |

Use this chart for salary overrides:

| If Wage Type is... | Then Override Wage Type is... |
|--------------------|-------------------------------|
| 1100               | 1101                          |
| 1122               | 1102                          |
| 1126               | 1102                          |
| 1127               | 1102                          |
| 1210               | None                          |
| 1250               | 1103                          |
| 1251               | 1102                          |

Click Enter   
 Save 

# 12

Pop-up: for payrate exceptions, you will be informed that the record has been locked for OA approval.

Click 

Information

 Record has been locked and request for OA approval sent.

# 13

## INFOTYPE 2012

For permanent employees, enter the number of holiday hours they are entitled to **as of the dual hire date** (refer to the [Holiday Entitlement Worksheet](#)).

Click Bypass 

**OR**

Click Enter   
 Save 

|                             |            |                           |            |             |
|-----------------------------|------------|---------------------------|------------|-------------|
| EE group                    | P          | Permanent                 | 11         | Corrections |
| EE subgrp                   | F8         | Full-time 80              | HH11       | PSCOA H1 OT |
| Start                       | 04/16/2012 | To                        | 04/16/2012 |             |
| Time transfer specification |            |                           |            |             |
| Time transfer type          | QHOL       | Anticipated Holiday hours |            |             |
| Number of hours             | 64.00      | Hours                     |            |             |

Non-perms are not entitled to holiday quota, in which case you will BYPASS.

# 14

## INFOTYPE 0009

Enter the banking information per the documents attached to the PAR.

### Bank Control Key

01 = Checking 02 = Savings

Always use the banking information on the new hire documents; **never** use what is indicated on the PAR.

This screen defaults to 'Main Bank'; if the employee has an additional bank account, you will need to input an 'Other Bank' record via PA30, after the action is complete.

Click Bypass 

### OR

Click Enter   
Save 

|           |            |              |            |             |             |
|-----------|------------|--------------|------------|-------------|-------------|
| EE group  | P          | Permanent    | 11         | Corrections | CR SCI Gra  |
| EE subgrp | F8         | Full-time 80 | HH11       | PSCOA H1 OT | Corr Ofr Tr |
| Start     | 04/16/2012 | to           | 12/31/9999 |             |             |

|                   |                          |
|-------------------|--------------------------|
| Bank details      |                          |
| Bank details type | Main bank                |
| Payee             | Miguel G Wint            |
| Postal Code/City  |                          |
| Bank Country      | USA                      |
| Bank Key          | 123456789                |
| Bank Account      | 111222333444             |
| Payment method    | B Payroll Direct Deposit |
| Purpose           |                          |
| Payment currency  | USD United States Dollar |

If the job code = U3210 or U3220, change the **Payment Method** to 'A' *Payroll Check*.

If the employee has no bank account, create a CRM ticket under 'anonymous' to Jordan Rummel, OA Operations. Use 'A' *Payroll Check* on IT0009.

**BYPASS THIS INFOTYPE FOR ONBOARDING EMPLOYEES** (they will input their banking information during the online tour).

# 15

## INFOTYPE 0006

Enter the permanent address and county per the documents attached to the PAR; a **PO Box is not acceptable** as the permanent address. If there is a PO Box, **do not** input it as part of the permanent address; only use it when creating the mailing address (refer to [Benefits Alert 2012-08](#)).

Be sure to spell out the street name and city name in its entirety.

This screen defaults to 'Permanent Residence'; if the employee has a mailing address, you will need to input a 'Mailing Address' record via PA30, after the action is complete (see [page 15](#)).

If the employee resides in a different state, enter '088' in the **Benefits County Code** field; submit a [CRM](#) ticket to Employee Services for review of benefits for out-of-state employees.

When you update the Benefits County Code to 088 for out-of-state employee's and the Code does not remain 088 you will need to check the address infotype (IT1028) on every org the position was assigned to and remove the House Number. Once you have done this you should be able to change the Benefits County Code to 088 and it should remain 088.

Click Enter   
Save 

|           |            |              |            |             |  |
|-----------|------------|--------------|------------|-------------|--|
| EE group  | P          | Permanent    | 11         | Corrections |  |
| EE subgrp | F8         | Full-time 80 | HH11       | PSCOA H1 OT |  |
| Start     | 04/16/2012 | to           | 12/31/9999 |             |  |

|                  |                     |
|------------------|---------------------|
| Address          |                     |
| Address type     | Permanent residence |
| Care Of          |                     |
| Address line 1   | 123 Anywhere Place  |
| Address line 2   |                     |
| City/county      | Anywhere            |
| State/zip code   | PA 17111            |
| Country Key      | USA                 |
| Telephone Number | 570 222-1234        |

|                |        |      |
|----------------|--------|------|
| Communications |        |      |
| Type           | Number | Exte |

|                      |             |
|----------------------|-------------|
| Benefits County Code |             |
| Benefits County Code | 015 Chester |

You **must** save this Infotype or IT0171 will not be created in the background.

# 16

## INFOTYPE 0207

A list of tax areas is presented; choose from this list based on the new hire documents (verify using the [Municipality Search](#)).

| Tax Area | Description                  | PostalCode | PostalCode |
|----------|------------------------------|------------|------------|
| FED      | Federal                      | 00000-0001 | 99999-9999 |
| PA       | Pennsylvania                 | 15000-0000 | 19699-9999 |
| PAUL     | Harrisburg                   | 17101-0000 | 17113-9999 |
| PB5A     | Lower Paxton Township        | 17111-0000 | 17112-9999 |
| PBJC     | Paxtang Borough              | 17111-0000 | 17111-9999 |
| PBVQ     | South Hanover Township       | 17111-0000 | 17111-9999 |
| PBZO     | Susquehanna Township-Dauphin | 17109-0000 | 17111-9999 |
| PBZV     | Swatara Township-Dauphin     | 17111-0000 | 17111-9999 |

The residence tax area will populate.

IF the employee resides in any of the following states, enter that state in the **Tax Area** field, exactly as listed below.

- DC MI VA
- DE NJ WV
- IN NY
- MD OH

For any other states not listed, Enter 'PA' in the **Tax Area** field.

Click Enter   
Save 

|                         |                        |              |      |             |             |
|-------------------------|------------------------|--------------|------|-------------|-------------|
| EE group                | P                      | Permanent    | 11   | Corrections | CR SCI Gra  |
| EE subgrp               | F8                     | Full-time 80 | HH11 | PSCOA H1 OT | Corr Ofr Tr |
| Start                   | 04/16/2012             |              | to   | 12/31/9999  |             |
| Resident data           |                        |              |      |             |             |
| Tax area                |                        | PBVQ         |      |             |             |
| Tax Authorities in Area |                        |              |      |             |             |
| Tax authority           | Description            |              |      | Tax level   | Description |
| FED                     | Federal                |              |      | A           | Federal     |
| PA                      | Pennsylvania           |              |      | B           | State       |
| PBVQ                    | South Hanover Township |              |      | D           | City        |

Refer to [PA Alert 2015-08](#).

# 17

## INFOTYPE 0208

The work tax area will default based on the position.

Click Enter   
Save 

|                         |                   |                        |      |             |             |
|-------------------------|-------------------|------------------------|------|-------------|-------------|
| EE group                | P                 | Permanent              | 11   | Corrections |             |
| EE subgrp               | F8                | Full-time 80           | HH11 | PSCOA H1 OT |             |
| Start                   | 04/16/2012        |                        | to   | 12/31/9999  |             |
| Work tax data           |                   |                        |      |             |             |
| Tax Area                |                   | PBU8 Skippack Township |      |             |             |
| Allocation              |                   | 100.00 %               |      |             |             |
| Tax Authorities in Area |                   |                        |      |             |             |
| Tax ...                 | Description       |                        |      | T...        | Description |
| PA                      | Pennsylvania      |                        |      | B           | State       |
| PBU8                    | Skippack Township |                        |      | D           | City        |

# 18

## INFOTYPE 0209

This screen determines to which state unemployment taxes will be paid, and should always default to PA.

Click Enter   
Save 

|                   |            |                 |      |             |
|-------------------|------------|-----------------|------|-------------|
| EE group          | P          | Permanent       | 11   | Corrections |
| EE subgrp         | F8         | Full-time 80    | HH11 | PSCOA H1    |
| Start             | 04/16/2012 |                 | to   | 12/31/9999  |
| Unemployment data |            |                 |      |             |
| Tax authority     |            | PA Pennsylvania |      |             |
| Worksite          |            |                 |      |             |

# 19

## INFOTYPE 0210

The **Tax Authority** and **Tax Level** will default.

Enter the **Filing Status** and **Allowances** per the documents attached to the PAR.

**Remember:** If the employee is claiming exemption from Federal Income Tax (per their W-4 form), change the **Tax Exempt Indicator** to 'R-exempt' earnings are reportable (*DO NOT use 'X' or 'Y'*). Change the end date of this record to 2/15 of the following year. **Do not** place any allowances on this record.

Via PA 30, copy this record and change the start date to 2/16 of the following year, and the end date to 12/31/9999. Change the **Tax Exempt Indicator** back to 'Not exempt', as each year the employee must re-claim exemption. Place the employee's allowances (if any) on this record.

|  |            |                 |            |                          |                              |
|--|------------|-----------------|------------|--------------------------|------------------------------|
| EE group   | P          | Permanent       | 11         | Corrections              | CR SCI Graterford            |
| EE subgrp  | F8         | Full-time 80    | HH11       | PSCOA H1 OT              | Corr Ofr Trm                 |
| Start  | 04/16/2012 | to              | 12/31/9999 |                          |                              |
| <b>Status</b>  |            |                 |            |                          |                              |
| Tax authority  | FED        | Federal         |            | Tax level                | A Federal                    |
| Filing Status  | 01         |                 |            |                          |                              |
| <b>Exemptions</b>  |            |                 |            |                          |                              |
| Allowances   | 1          |                 |            |                          |                              |
| Tax Exempt Ind.  | Not exempt |                 |            | <input type="checkbox"/> | IRS mandates                 |
| <b>Withholding adjustments</b>   |            |                 |            |                          |                              |
| Add.withholding  |            | USD             |            | <input type="checkbox"/> | Non-resident tax calculation |
| Default formula  | 01         | PCT MTHD-RES. U |            | Alternative formula      |                              |
| <b>Additional Information</b>  |            |                 |            |                          |                              |
| <input type="checkbox"/> Check here if the last name differs from that shown on the Social Security card |            |                 |            |                          |                              |

Check W-4 for additional withholding.

The exemption expiration date may change each year per IRS regulations; SAP will automatically update the date if it is different than what you have entered. Continue to use the dates indicated in this guide.

**BYPASS THIS INFOTYPE FOR ONBOARDING EMPLOYEES** (they will input their filing information during the online tour).

Click Bypass 

**OR**

Click Enter   
Save 

**Note:** if a payrate exception was used, **IT0168** may be presented at this point; input the annual salary in the *Salary Override* field during the action and save. You will need to manually remove the salary via PA30 after IT0008 has been unlocked by OA Salary & Time. For employees between ages 70 or older, SAP will automatically cap their coverage at a certain amount; a salary override will not be necessary.

# 20

## INFOTYPE 0006, Subtype US01

The **Check Distribution Code** should default to '0008888 Mail to Employee's Home Mailing Address'.

Click Enter   
Save 

|                               |            |              |            |             |                                 |
|-------------------------------|------------|--------------|------------|-------------|---------------------------------|
| EE group                      | P          | Permanent    | 11         | Corrections | CR SCI Gra                      |
| EE subgrp                     | F8         | Full-time 80 | HH11       | PSCOA H1 OT | Corr Ofr Tr                     |
| Start                         | 04/16/2012 | to           | 12/31/9999 |             |                                 |
| <b>Address type</b>           |            |              |            |             |                                 |
| Paycheck Location             |            |              |            |             |                                 |
| <b>CDC Data</b>               |            |              |            |             |                                 |
| Check Distribution Code       | 0008888    |              |            |             | Mail to employee's home address |
| <b>Delivery Location Name</b> |            |              |            |             |                                 |
| Address Line 1                |            |              |            |             |                                 |
| Address Line 2                |            |              |            |             |                                 |
| City                          |            |              |            |             |                                 |
| Region                        |            |              |            |             |                                 |
| Postal Code                   |            |              |            |             |                                 |

# 21

## INFOTYPE 0016

Enter the **Contract Type** per the PAR and probationary period per your checklist.

Enter the civil service cert# **OR** non-civil service BSE# (*civil service jobs require a Cert#; contact the agency if the Cert# is not listed on the PAR*).

**Remember:** HI bargaining unit probationary period is 12 months  
NCS DOC: Use 'NCS-Prob' for BU-covered positions and 'WCS' for management positions

PRN Nurse Aides do not serve a probationary period; use contract type NCS

PRN LPN/PRN RN requires a 6-month probationary period; use contract type CS

DOT Seasonal Employees: click [here](#)

|                                 |                   |              |            |             |
|---------------------------------|-------------------|--------------|------------|-------------|
| EE group                        | P                 | Permanent    | 11         | Corrections |
| EE subgrp                       | F8                | Full-time 80 | HH11       | PSCOA H1 OT |
| Start                           | 04/16/2012        | to           | 12/31/9999 |             |
| Contractual regulations         |                   |              |            |             |
| Contract Type                   | CS - Probationary |              |            |             |
| Periods                         |                   |              |            |             |
| Probationary Period             | 12 Months         |              |            |             |
| CS Cert / Probation Data        |                   |              |            |             |
| Union Probation Period          | 12                | MONTHS       |            |             |
| Civil Service certification no. |                   |              |            | 00560       |
| Bureau of State Employment no.  |                   |              |            |             |

NCS Management EE's do not serve a probationary period—*Personnel Rules, page 94, section 9.11 (d)*

Click Enter   
Save 

# 22

## INFOTYPE 0019

This Infotype will only be presented if the contract type is civil service probationary.

It will not be presented for non-civil service

jobs and must be created via PA30, after the action is complete.

Set the **Reminder Date** to two months before the **Date of Task**

Click Enter   
Save 

|                     |                        |                      |      |             |      |
|---------------------|------------------------|----------------------|------|-------------|------|
| EE group            | P                      | Permanent            | 11   | Corrections | CR S |
| EE subgrp           | F8                     | Full-time 80         | HH11 | PSCOA H1 OT | Corr |
| Task                |                        |                      |      |             |      |
| Task Type           | End of Prob Period     |                      |      |             |      |
| Date of Task        | 04/15/2013             | Processing indicator | New  |             |      |
| Reminder            |                        |                      |      |             |      |
| Reminder Date       | 02/15/2013             |                      |      |             |      |
| Lead/follow-up time | For specific task type |                      |      |             |      |

**Note:** Dept of Corrections ONLY—for NCS management positions, you will need to create IT0019. For all other orgs, NCS management positions will not need IT0019 created.

# 23

## INFOTYPE 0057

This information will default from the position; most new hires start at *Fair Share*,

change the status if necessary.

- 1 = Union Dues
- 2 = Fair Share

BYPASS for (if presented):

- management employees
- unclassified employees
- confidential employees
- bargaining units **L1, E4 or E7**

If EE is enrolled in union dues on the original record, the Dual Hire record would still reflect fair share.

Click Bypass 

The EE has a choice in the new position.

Click Enter   
Save 

|                 |                                  |                    |            |             |
|-----------------|----------------------------------|--------------------|------------|-------------|
| EE group        | P                                | Permanent          | 11         | Corrections |
| EE subgrp       | F8                               | Full-time 80       | HH11       | PSCOA H1 OT |
| Start           | 04/16/2012                       | to                 | 12/31/9999 |             |
| Payment data    |                                  |                    |            |             |
| Member type     | PSCOA - PA St Corr Officers Assn |                    |            |             |
| Wage Type       | 4F24                             | PSCOA - Fair Share |            |             |
| Additional Data |                                  |                    |            |             |
| Status          | 2                                |                    |            |             |
| Local           | 0010                             |                    |            |             |

**INFOTYPE 0015** will be presented next for employees going into the **UGSOA R1 bargaining unit**.

Enter the following information:  
**Wage Type** = 4B96 **Amount** = \$9.90

If IT0014 is presented, enter and save.

# 24

## INFOTYPE 0077

Enter the race as indicated on the PAR; **DO NOT** guess the race based on the employee's name or driver license/ID card.

*If the race is not indicated on the PAR or the attached documents, contact the agency; if you have not obtained the appropriate race and need to close the PAR, choose 'Unknown/Undisclosed' and notate the closed PAR.*

Click Bypass 

**OR**

Click Enter   
Save 

|                          |                        |              |            |             |
|--------------------------|------------------------|--------------|------------|-------------|
| EE group                 | P                      | Permanent    | 11         | Corrections |
| EE subgrp                | F8                     | Full-time 80 | HH11       | PSCOA H1 OT |
| Start                    | 04/16/2012             | To           | 12/31/9999 |             |
| Additional Personal Data |                        |              |            |             |
| Ethnic origin            | Black/African-American |              |            |             |

**BYPASS THIS INFOTYPE FOR ONBOARDING EMPLOYEES** (they will input their ethnicity during the online tour).

# 25

## INFOTYPE 0094

Per PA Alert 2014-21 IT0094 (Residence Status) will no longer be used as a repository for Form I-9 data. Updates to the infotype will also be discontinued. All Form I-9 information will be stored and accessible to agencies via the e-OPF.

Click Bypass 

# 26

## INFOTYPE 9009

This screen will be presented at the end of the action. All onboarding information and documentation will be sent to this address. Enter the employee's home email address **carefully** as indicated on the PAR.

The I-9 verifier position defaults to the employee's supervisor's position number in the background; leave blank unless otherwise indicated on the PAR.

**BYPASS** for the excluded population and for exceptions; otherwise **SAVE**.

Click Enter   
Save 

|                          |                 |              |            |                  |
|--------------------------|-----------------|--------------|------------|------------------|
| EE group                 | P               | Permanent    | 2103       | Public Welfare P |
| EE subgrp                | F7              | Full-time 75 | AA11       | AFSCME A1 OT     |
| Start                    | 04/16/2012      | To           | 12/31/9999 | Chng             |
| Personal Onboarding Data |                 |              |            |                  |
| Employee Personal Email  | mwint@gmail.com |              |            |                  |
| Onboarding Process Data  |                 |              |            |                  |
| I9 Verifier Position     |                 |              |            |                  |
| Onboarding Receipt Data  |                 |              |            |                  |
| Onboarding Receipt Date  |                 |              |            |                  |

**Note:** For 'exception' employees (i.e. Farm Show Workers) BYPASS this Infotype.

## Post-Transaction—PA20

Check **all** Infotypes to ensure the records were successfully created with the effective date (refer to the [Post-Transaction Checklist](#)). You will also need to **review IT0002** as this Infotype creates in the background based on the information from the Employee's other EE#.

## Post-Transaction—PA30

### INFOTYPE 0006, Subtype 5

If the employee has a mailing address, create this record effective the new hire date.

Enter IT0006, subtype 5.

Select the radio button next to **Period** and enter the effective date in the **From** field.

Click Create 

Enter the mailing address as per the new hire documents.

Use the mailing address for the correspondence.

Click Enter   
Save 

| EE group         | P               | Permanent    | 11          | Corrections |                 |
|------------------|-----------------|--------------|-------------|-------------|-----------------|
| EE subgroup      | F8              | Full-time 80 | Cost.Center | 11PYRLDFLT  | PAYROLL DEFAULT |
| Start            | 04/16/2012      | to           | 12/31/9999  |             |                 |
| Address type     | Mailing address |              |             |             |                 |
| Care Of          |                 |              |             |             |                 |
| Address line 1   | PO Box 222      |              |             |             |                 |
| Address line 2   |                 |              |             |             |                 |
| City/county      | Anywhere        |              |             |             |                 |
| State/zip code   | PA              |              | 17000       |             |                 |
| Country Key      | USA             |              |             |             |                 |
| Telephone Number |                 |              |             |             |                 |

### INFOTYPE 0009, Subtype 1

If the employee has an additional bank account, create this record effective the new hire date (same process as above). **DO NOT** create this Infotype for employees who are onboarding; they will input the banking information on their own.

### INFOTYPE 0021, Subtype 7

If the employee has emergency contacts, create this record effective the new hire date (same process as above). If multiple phone numbers are provided for each contact, create a separate record for each phone number. **DO NOT** create this Infotype for employees who are onboarding; they will input the emergency contacts on their own.

### INFOTYPE 0019

Create this record for NCS employees (same process as above), unless they are management (excluding DOC employees) or DOT seasonal employees.

### **INFOTYPE 167**

Creation of New Annuitant Health Record for **PSCOA Employees (BU H1)** Effective 15/16 fiscal year. Make sure that the correct Annuitant Health record creates for PSCOA bargaining unit H1 employee's. The Dependent Coverage and Cost Rule data fields both will reflect EE2, Employee for PSCOA and Employee Only for PSCOA. **Benefits Alert 2015-03**

### **INFOTYPE 0171, IT0169**

For Deputy Wildlife Conservation Officers (Job Code U6100—Formerly Deputy Game Protectors) who are not to be enrolled in SERS, change the 2nd program grouping from **09** to **13**. If a Deputy Wildlife Conservation Officer is being hired as a Dual Hire and they are enrolled in SERS in the other job you would need to enroll them in SERS in the new job as well. EE is being hired into a permanent position and they are currently a volunteer Deputy Wildlife Conservation Officer at the Game Commission. Since the EE is being hired into a position that requires SERS enrollment you will also need to enroll the EE in SERS in the Deputy Wildlife Conservation Officer position effective the same date as the permanent position.

For **"Dual Hire"** employees you will need to create IT0171. Only the SEAP record on IT0167 needs created, effective the date of the action; it does not automatically create in the background.

### **INFOTYPE 0378**

This infotype will need to be created for STY NHIR as well as STY RETR effective the date of the **Dual Hire**.

**It is imperative that IT0171 and IT0378 get created the same day the Dual Hire action is completed. Otherwise, the onboarding record will not be created resulting in the EE to never go through online orientation.**

### **INFOTYPE 0235**

For **"Dual Hire"** employees, they should have an LST/OPT exemption under their **"temporary"** job with an end date of 12/31/9999. The IT0235 record, STY is the new working tax area (ex: PAUL = Harrisburg). For employees who are Dual Hired in 2 non-perm jobs, we are NOT to exempt them from the LST tax on IT0235.

If the Dual Hire is as a result of the employee being in the National Guard, the LST/OPT exemption is not necessary unless a valid exemption is provided for the non-National Guard position.

This Infotype will be created in the background if the job class is eligible for tax exemptions. You may need to create other exemption records based on the job, **14 calendar days** from the effective date (click [here](#) for more information).

For DPW **Resident Workers** (jobs U3210 or U3220) and L&I **Student Employe State School** (job U2541):

Create IT0235, **subtype FED**

Enter 'Y' in the:

- 03-Employee Soc Sec Tax
- 05-Employee Medicare Tax
- 04-Employer Soc Sec Tax
- 06-Employer Medicare Tax

|           |            |              |            |             |                   |
|-----------|------------|--------------|------------|-------------|-------------------|
| EE group  | P          | Permanent    | 11         | Corrections | CR SCI Graterford |
| EE subgrp | F8         | Full-time 80 | HH11       | PSCOA H1 OT | Corr Ofr Trm      |
| Start     | 04/30/2012 | to           | 12/31/9999 |             |                   |

|                     |     |         |           |   |         |
|---------------------|-----|---------|-----------|---|---------|
| Tax type exceptions |     |         |           |   |         |
| Tax authority       | FED | Federal | Tax level | A | Federal |

|             |                                       |   |                      |   |                    |   |
|-------------|---------------------------------------|---|----------------------|---|--------------------|---|
| Other Taxes |                                       |   |                      |   |                    |   |
| Ta          | Tax Type Description                  | D | Default Formula Text | F | Override Formula T | E |
|             | 03Employee Social Security Tax        |   | 01EMPLOYEE SOCIAL    |   |                    | Y |
|             | 04Employer Social Security Tax        |   | 01EMPLOYER SOCIAL    |   |                    | Y |
|             | 05Employee Medicare Tax               |   | 01EMPLOYEE MEDIC     |   |                    | Y |
|             | 06Employer Medicare Tax               |   | 01EMPLOYER MEDIC     |   |                    | Y |
|             | 10Employer Unemployment Tax           |   | 01EMPLOYER UNEM      |   |                    |   |
|             | 55Employee Railroad Rtrmt Tier1 Soc S |   | 01RAILROAD RETIRE    |   |                    |   |

Click Enter   
Save 

Create IT0235, **subtype PA**

Enter 'Y' in the:

- 20-Employee Unemployment Tax

|           |            |              |            |             |                   |
|-----------|------------|--------------|------------|-------------|-------------------|
| EE group  | P          | Permanent    | 11         | Corrections | CR SCI Graterford |
| EE subgrp | F8         | Full-time 80 | HH11       | PSCOA H1 OT | Corr Ofr Trm      |
| Start     | 04/30/2012 | to           | 12/31/9999 |             |                   |

|                     |    |              |           |   |       |
|---------------------|----|--------------|-----------|---|-------|
| Tax type exceptions |    |              |           |   |       |
| Tax authority       | PA | Pennsylvania | Tax level | B | State |

|             |                                 |   |                      |   |                    |   |
|-------------|---------------------------------|---|----------------------|---|--------------------|---|
| Other Taxes |                                 |   |                      |   |                    |   |
| Ta          | Tax Type Description            | D | Default Formula Text | F | Override Formula T | E |
|             | 10Employer Unemployment Tax     |   | 01EMPLOYER UNEM      |   |                    |   |
|             | 11Employer Debt Repayment Tax   |   | 01EMPLOYERS FUTA     |   |                    |   |
|             | 20Employee Unemployment Tax     |   | 01EMPLOYEE UNEM      |   |                    | Y |
|             | 61Employee Retirement Plan-S.S  |   | 01EMPLOYEE RETIRE    |   |                    |   |
|             | 62Employee Retirement Plan-Med. |   | 01EMPLOYEE RETIRE    |   |                    |   |
|             | 63Employer Retirement Plan-S.S  |   | 01EMPLOYER RETIR     |   |                    |   |

Click Enter   
Save 

DPW **YDC/YFC Training Program Workers** (job U2542) are UC exempt **ONLY**.

Create IT0235, **subtype equal to work tax area on IT0208**

Enter 'Y' in the:

- 84-Local Service Tax

|           |            |              |            |             |                   |
|-----------|------------|--------------|------------|-------------|-------------------|
| EE group  | P          | Permanent    | 11         | Corrections | CR SCI Graterford |
| EE subgrp | F8         | Full-time 80 | HH11       | PSCOA H1 OT | Corr Ofr Trm      |
| Start     | 04/30/2012 | to           | 12/31/9999 |             |                   |

|                     |      |            |           |   |      |
|---------------------|------|------------|-----------|---|------|
| Tax type exceptions |      |            |           |   |      |
| Tax authority       | PAUL | Harrisburg | Tax level | D | City |

|             |                      |   |                      |   |                    |   |
|-------------|----------------------|---|----------------------|---|--------------------|---|
| Other Taxes |                      |   |                      |   |                    |   |
| Ta          | Tax Type Description | D | Default Formula Text | F | Override Formula T | E |
|             | 84Local Services Tax |   | 01                   |   |                    | Y |

Click Enter   
Save 

**Note:** For the Dual Hire employees that have a Permanent and a Non-Permanent job and for Resident Workers, the end date of the LST/OPT exemption is 12/31/9999. For the Dual Hire the LST/OPT exemption needs to be on the Non-Permanent employee number. All others, the end date is 12/31 of the current calendar year.

**Note:** for all other types of employees, if their municipality collects **\$10 or less**, the LST/OPT tax code will default to 51. Do not try to change it back to 84; SAP will not allow it. Input the 'Y' then enter and save.

Refer to [PA Alert 2008-1](#).

# HRBEN0001

## Dual Hire employee's must be enrolled in retirement under both EE numbers. Exception—Non-Commonwealth Travelers and PA National Guard

To enroll the employee in retirement, you will need to use HRBEN0001.

**Note:** Dept of Education employees, do not enroll; submit a [CRM](#) ticket to Emp Svc.

1

On the home screen of SAP, under the Benefits folder, double-click **HRBEN0001—Enrollment.**



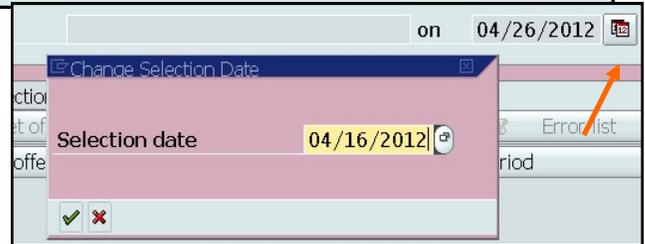
2

Enter the employee number.



Click on the date change icon.

Change the date to the new hire effective date.



3

Click  Double-click **SERS/PSERS/TIAA enr1** (if you don't see this line, go back and check IT0378 to ensure the RETR record was created).

| Possible offers             | Enrollment period            |
|-----------------------------|------------------------------|
| New Hire Enrollment         | 04/16/2012 - 12/31/99        |
| <b>SERS/PSERS/TIAA enr1</b> | <b>04/16/2012 - 05/17/20</b> |
| DeferredComp Regular        | 01/01/1800 - 12/31/99        |

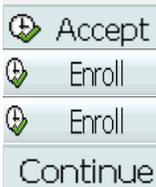
4

Scroll through the list to find the appropriate retirement class; double-click.

In this example, the employee has been hired into the H1 bargaining unit, and is therefore eligible for age 50/55 retirement (COV 1 CAT 1,6,8); double-click.

| Plan                   | Status  | Validity period |
|------------------------|---|-----------------|
| State Emp Ret          |   |                 |
| CLS A3 COV 1 CAT 0     |   | 04/16/2012 -    |
| CLS A3 COV 1 CAT 1,6,8 |  | 04/16/2012 -    |
| CLS A3 COV 1 CAT 7     |   | 04/16/2012 -    |
| CLS A3 COV 4 CAT 0     |   | 04/16/2012 -    |
| CLS A3 COV 4 CAT 1,6,8 |   | 04/16/2012 -    |
| CLS A3 COV 4 CAT 7     |   | 04/16/2012 -    |
| CLS A4 COV 1 CAT 0     |   | 04/16/2012 -    |

Enter '6.25' in the **Percentage** field.



**You will need to also enroll the employee in the New Hire Enrollment, Declined**

## *References*

[Benefits Alert 2012-08](#)

[Benefits Alert 2015-03](#)

[Personnel Administration Alert 2008-1](#)

[Personnel Administration Alert 2011-04](#)

[Personnel Administration Alert 2004-18](#)

[Personnel Administration Alert 2012-11](#)

[Personnel Administration Alert 2012-12](#)

[Personnel Administration Alert 2013-06](#)

[Management Directive 530.11](#)

[Management Directive 540.7](#)