

Promotion/Demotion/Reassignment

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By Infotype

IT0000	IT0008	IT0208	IT2012
IT0001	IT0041	IT0014	IT2001
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Overview

Promotions, demotions and reassignments can occur within the same department or agency, or between agencies. An employee can go from a non-permanent to a permanent position, or vice versa. The [Personnel Rules](#) (which are based on minimum hourly rate) and [Civil Service Rules](#) (based on maximum salary) govern how an employee is compensated, which then determines which action to process.

The effective date of a promotion/demotion/reassignment (per [PA Alert 2011-04](#)) is typically the Saturday or Sunday after the most recent pay period. In some cases, however—i.e. end-of-training promotions—the effective date may be equal to the first day in the new position. In such cases you may need to confirm with the agency. **For actions where a CS cert was issued, the effective date of the action cannot be prior to the date the cert was issued.**

Deleting/changing the date of a Promotion/Demotion/Reassignment action

If you receive a re-opened E-PAR to remove/delete an action with a Civil Service Cert number we are required to email the Civil Service Commission's Resource Account: ra-cs-paad@pa.gov.

Whenever you **remove/delete/change the date of** a Promotion/Demotion/Reassignment action (transfers from one agency to another and transfers within an agency where the position number is changing) regardless if it has a Civil Service Cert number **you must submit a ServiceNow ticket**. The link for the ticket is <https://paitsm.service-now.com/navpage.do>. You sign into this with the same credentials you sign into your computer with. The instructions on how to create one is out on the portal under General Toolkit, Processing, How to create a ServiceNow ticket.

The notification should include the following text:

This is to notify you that the HR Service Center, Agency Services and Operations Division has processed a deletion of a [Action Type] for the following employee:

Name: [Employee's Name]

Personnel Number: [8-digit personnel number]

Personnel Area: [Department Name and Personnel Area]

Transaction Effective Date: [Hire effective date mm/dd/yyyy]

If you have any questions or need any further information, please contact [Enter Your Name] via email at [Enter Your Email address] or by phone at 877.242.6007, then press 1 for Agency Services.

- 8. LWOP** Escalate the PAR to a specialist if the employee is currently on **LWOP** and the agency requests to have the return from LWOP action completed by the HR Service Center. **The specialist will be responsible for processing the return action and reviewing the benefits infotypes to ensure they reflect the correct date.**

Per Gregg Matthews, OA Salary & Time Administration, we are to leave the employee at the rate they were making when they went out on LWOP and upon return they will be placed at the promotion/demotion rate. This is due to the employee not being entitled to increases until they return from LWOP.

If the begin LWOP action was with benefits, the return action needs to reflect with benefits. The benefits records are not changed since they were not stopped when the begin action processed.

If the begin LWOP action was without benefits, the return action needs to reflect without benefits. The benefit records that were stopped will be reactivated.

If the employee is going from non-permanent to permanent, the benefits enrollment to create the declined records will need to be processed using HRBEN0001. **If the begin LWOP action was with benefits you can enroll them in benefits the date of the action. If the begin LWOP action was without benefits you need to enroll them in benefits the date the employee physically returns to work which would be the date of the Return from LWOP action.**

The group life insurance record (BLIF) on IT0168 created with promotion action must reflect a salary override for the annual salary for the rate of pay while on LWOP. Additional lines on IT0168 will be required to reflect a salary override consistent with the promotion rate, as well a 1/1/20XX record where salary override is removed.

If the agency processes the return from LWOP action, they will be responsible for submitting a Benefits Help Desk Ticket to Operations to have the benefits enrollment completed.

- 9. If the employee is moving to or from an age 50/55 retirement job class, create IT0378, subtype RETR and IT0169.**
10. For positions moving from a CWS work schedule to a regular work schedule or vice versa the [Planned Compensation](#) on the position will need to be updated.

11. Typically, unless the employee is going from non-permanent to permanent, there is no need to go into HRBEN0001. However, for employees who transfer from any of the following independent agencies, you must re-enroll the employee in Annuitant Health via HRBEN0001 and select dependent coverage:
 - PA Health Care Cost Containment Council (43)
 - Philadelphia Port Authority (8801)
 - Port of Pittsburgh Commission (8801)

When an employee is promoted or demoted between dissimilar pay schedules (such as CO to RG or MA to SP), use the [Cross-Schedule Placement](#) calculator to determine what their pay rate should be. If the rate on the PAR is different, contact the agency. If the PAR instructions indicate an exception, there should be approval documentation attached. If there is not, do not proceed and contact the agency.

12. When an EE is being placed in a wage position due to an **ESPF absence**, the EE Group on the new position **MUST** reflect **Permanent** due to HCR.
13. After transaction is complete, review the IT0167 (Health Plans), IT0168 (Insurance Plans) and IT0169 (Savings Plans) to ensure that the record did not get inadvertently delimited. If the record gets delimited in error, correct it via PA30 and escalate the issue to your supervisor via email. Include the following information in the email: Employee's Name, Personnel Number, Action Type, Action Effective Date, Delimited Benefit Record, Date Benefit was ended.
14. **Annuitant Employee's transferring into a Permanent Position**—If an **Annuitant employee** is being promoted/demoted/reassigned from an **Annuitant position into a Permanent position**, create a CRM ticket (send to Kathy Reichert-Wise) to determine if they were REHP eligible. If they were, a ZT DATE is needed on IT0041. This should be done **BEFORE** you process the action since this will affect their Supplemental Benefits start date. You will also need to have a **ZN2P** record added to **IT2012 effective the date of transfer**. This record tells the system to generate the anticipated personal quota (Q30) for the employee.
15. When an employee transfers from a **TCP** to a **permanent position** the longevity date (Z3) date on IT0041 needs to be updated. The time worked as a TCP counts towards their longevity date. Please refer to the Collective Bargaining Agreements under AFSCME Temporary Pool.
16. **Demotions**—When demoting a newly hired employee who is still in their probationary period, they should be placed at the minimum step. Otherwise, the employee would be advantaged over other newly hired employees in the lower classification. Considering they hadn't completed the probation period, and thus don't yet have contractual rights, placing employees at the minimum in these situations is entirely appropriate. Furthermore, in the case of Ms. Gifford she is also changing unions, making placement at the minimum even more justified, as AFSCME would not look favorably on a PSSU employee who hadn't completed their prob period leapfrogging other AFSCME employees.

17. If you are processing an action where an employee is either leaving or going into a part-time position where there might be more than 1 holder make sure you are checking the vacancy status to reflect correctly. If the position that is becoming vacant by your action is filled with another employee the vacancy should still reflect as filled and not open.

18. **SEIU – Article 25, Section 8 b (4)**

Below is an excerpt from the SEIU agreement which refers to the Filling a Forensic Registered Nurse vacancy (as defined in Article 25, Section 4 of the agreement). If the employee successfully passes the 6-month assessment, they are retroactively reclassified into the Forensic Registered Nurse job. If the date on the E-PAR does not reflect the retroactive date, please be sure to use the correct date.

- (4) If the method chosen is the reassignment of the most senior Registered Nurse who expresses interest in the position, the employee will be reassigned with the appropriate increase in salary for a six month period during which the employee's work performance will be assessed. If the employee passes the assessment period, the employee's classification will be changed retroactive to the date of the initial assignment. If the employee's work performance is unacceptable and the reassignment is terminated with an appropriate decrease in salary, the employee or the union may follow the review process contained in the side letter between the parties. The termination of a FRN Nurse work assignment will not be arbitrary or capricious.

19. **EE transfers from a non-R4 BU to an R4 BU or if EE transfers from a non-K8 BU to a K8 BU** please submit a Help Desk Ticket to the Time Team indicating that the EE transferred into either the **R4 BU or K8 BU**. The reason being is if the EE transfers into either the **R4 or K8 BU** during the 2nd year of employment it requires manual quota corrections to increase the personal quotas.

20. For employee's who are **transferring position/agency** please make sure to **DELIMIT** the **work address** on IT0006 if they have one.

Agency-Specific Exceptions

The following agencies have specific exceptions to be mindful of:

Department of Transportation (DOT)

Check employee's IT0007 to see if they are going from a CMR work schedule to a Non CMR work schedule. If yes, move PAR to a specialist to review the ZIPY and CAT **prior** to processing action. The specialist will review and determine if there are future dated absences. The specialist will move the PAR back to the rep, letting him/her know if it is okay to process the action.

If an EE is on the CMR work schedule and is transferring from DOT to a different agency and there are future dated absences, the rep will need to email/call the contact at DOT to have them removed. (Do not move the PAR to the agency because in this instance, the PAR will go to the new agency, not DOT). Once the absences are removed, the rep can process the action.

***Note:** Civil Engineer Trainees are promoted based on the PPIM, not the date on the IT0019. Effective date should be the first day of the full pay period after the 12 month training period is over.

Liquor Control Board (LCB)

For liquor store employees ONLY, that are being reassigned to another agency, the action should not be processed before the employee's time processes (every Sunday night). The actions can be processed the Monday after the effective date. For example the EE starts at the new position 02/08/2014 you can process the action 02/10/2014 since the EE's time ran on Sunday 02/09/2014.

PA Emergency Management Agency (PEMA)

Use a payrate exception reason code for employees with a work schedule that starts with 'BAK'.

Department of Military and Veterans Affairs (DMVA)

Use a payrate exception reason code for employees with a work schedule that starts with either 'BAK' or 'BC'.

For PRN Nurse Aides, there is no probationary period; use contract type NCS. Do not reference a probationary period in the letter.

For PRN LPN/RNs, there is 6-month probationary period; use contract type CS. Use the specific letterhead template that references a probationary period of 1040 hours.

Department of Corrections (DOC)

If the employee is being promoted from a Corrections Officer 1 to a Corrections Officer 2, the effective date could be mid-pay period (confirm the date with the agency).

For employees going into the CIVEA/PSEA/NSEA union, bypass IT0057.

For Corrections Officer Trainees on LWOP under Act 632, the probationary period is extended if the promotion action was processed while on LWOP; the employee is not entitled to a pay increase until the probationary period is completed. Also, for COT's moving from wage to salary—if the position remains the same—no letter is needed.

Corrections Officer Trainees being promoted to Corrections Officer 1, the ZB (Annual Increment) date should reflect one year from the promotion date. The day of the month should always reflect the 1st day of the month.

Promotions for Maintenance Repairman 2 and Corrections Stock Clerk 2—The initial union probationary period for H1 EE's upon hire is 12 months, which the job reflects. However, the contract states differently for promotions. EE's only have to serve 6 months for promotions within H1.

Employees in the Psychological Services Associate, Corrections (43012), Psychological Services Specialist, Corrections (42990), Social Worker 1(40060) and Social Worker 2(40070) jobs who were granted a two pay scale level increase as a result of possessing licensure as a Social Worker, Clinical Social Worker, or Professional Counselor issued by the Pennsylvania State Board of Social Workers, Marriage and Family Therapists and Professional Counselors in accordance with EBR CB-15-019 must relinquish the additional pay if they voluntarily accept a position in a job that not referenced in the agreement or transfer to another Commonwealth agency.

Department of Corrections (DOC)

If an EE is going into the H1 bargaining unit the personal leave still needs to be ended before you process your action. Please NOTE that not all employees will need this done. This is only for those employees whose Bargaining Units still earn Personal Leave. The absences and attendances on IT2001 and IT2002 will also need to be reviewed. Some of the leave codes an employee is entitled to as an H1 bargaining unit EE, they are not entitled to them when they leave the H1 bargaining unit. Also some of the leave codes an employee not in H1 is entitled to as an H1 BU EE they are not entitled to. Please review the list on page 9 of the Promotion/Demotion/Reassignment guide on the portal.

Via IT2006 – All – Overview icon  – select the current Personal Leave and Personal Leave – Actual lines (you will need to do this twice as you can't select both at the same time).

Click the change icon 

List Absence Quotas (2006)

Personnel No: 652553 Robyn M. Williams Active Payr.area: Z1

EE group: P Permanent 11 Corrections CR SCI Graterford

EE subgrp: F8 Full-time 80 HH11 PCSOA H1 OT Corr Rcrds Spcst

Choose: 01/01/1800 To: 12/31/9999 STy.:

Absence Quotas (2006)

Start Date	End Date	A...	Quota text	Start ded	End ded.	Number	Deduction
01/06/2013	01/04/2014	30	Personal leave	01/06/2013	01/04/2014	29.99000	29.99000
01/06/2013	01/04/2014	31	Personal Leave - Actual	01/06/2013	01/04/2014	0.00000	0.00000

Change the Deduction to date to the last day the employee was not in the H1 BU

 **Display Absence Quotas (2006)**

Display Absence Quotas (2006)

     Personal work schedule | Activity allocation

Personnel No: 652553 Robyn M. Williams

EE group: P Permanent 11 Corrections

EE subgrp: F7 Full-time 75 AA11 AFSCME A1 OT

From: 01/06/2013 To: 01/04/2014 Chg.

Absence quota

Category	30	Personal leave
Quota number	29.99000	Hours
Deduction	29.99000	 N
Deduction from	01/06/2013	
Deduction to	12/21/2013	

Click Enter and Save. The Personal Leave has been ended.

This also applies to H1 in DHS.

Corrections/Department of Human Services

If the employee is in the H1 bargaining unit and they are transferring out of the H1 bargaining unit the absences and attendances on IT2001 and IT2002 will need reviewed. Any future dated absences and attendances will need **removed prior** to processing the action because some of the leave codes an employee is entitled to as an H1 bargaining unit employee they are not entitled to when they leave the H1 bargaining unit . When removing these absences/attendances please take a screen shot and attach it to the PAR.

Absence codes an EE is not entitled to when LEAVING the H1 bargaining unit

Here is a list of the Absence codes: (IT2001)

A/A Type	DESCRIPTION	WAGE TYPE
BL	Pd-H1&D4-Brv	2840
C4	UnSched Comb Lv >3	2857
CI	WRI-H1-Comb	2882
CM	WRI-H1-Comb:Med Appt	2895
CN	UnSched Comb Lv <4	2855
CP	Pd-H1-Comb-Prschld	2854
SA	WRI-H1-Sick L/T:Med Appt	2896
SD	Pd-H1-Sick L/T Brv 4/+	2813
SJ	WRI-H1-Sick L/T Injury	2886
SL	Pd-H1-Sick L/T Emp Ill	2815
SS	Pd-H1-Stress Day	2880
YC	SPF Combined	2841

Here is a list of Attendance codes: (IT2002)

A/A Type	SAP Attendance Description	Premium No.	Wage/Time Type
WT1	Walking Time Overtime @ 1.0	-	2436
WT2	Walking Time Overtime @ 1.5	-	2437
WT3	Walking Time Overtime @ 2.0	-	2438
WHT6	Walking Holiday Worked @ .50	-	2445
WIT6	Walking Insuff Time @ .50	-	2452
WHC	Walking Higher Class Reg	-	2522
WH1	Walking Higher Class OT @ 1.0	-	2523
WH2	Walking Higher Class OT @ 1.5	-	2524
WH3	Walking Higher Class OT @ 2.0	-	2525

Absence codes an EE is not entitled to when going into the H1 bargaining unit are as follows: Annual Leave (A), Personal Leave (P), Sick Leave (S)

Please make sure that **prior** to deleting these absences you take a screenshot of them and attach it to the PAR.

Corrections/Probation and Parole

If the employee is transferring out of the Dept of Corrections in the IOCMS Project (Org 00111000) with any job title, or from the PA Board of Probation and Parole in Philadelphia County

- | | |
|---|--|
| Parole Agent 2 | Parole Supervisor |
| Parole Manager 1 | Parole Manager 2 |
| Probation & Parole District Director 1 | Probation & Parole District Director 2 |
| District Director | Deputy District Director |
| Probation & Parole Deputy District Director | |

And have an override on IT0008, delete the override on the new line of history. **The only time you will NOT delete the IT0008 override is when an employee is being promoted from any of the job codes listed above to another job code listed above and are staying in Philadelphia County (for Probation and Parole).** The action should be processed as a Payrate Exception so that you can input the salary override back on IT0008.

Department of Education

For Employee's who are transferring **into** the Department of Education and they have a SERS footprint a CRM ticket is not required and you will not touch IT0169. **Remember once in SERS always in SERS.**

For Employee's who are transferring **out of** the Department of Education and are enrolled in either PSERS or TIAA-CREF you will need to delimit IT0169 and create a new line of history enrolling the employee in SERS.

Pennsylvania State Police (PSP)

Refer to [Enlisted Members Transactions](#) for specific information regarding PSP enlisted members. All Cadet classes start on a Monday.

Due to the recent changes to the Trooper wage progression in the L1 contract, a new Pay Scale Area of 'NU-PSTA New Hires' was created. The positions planned compensation will need to be updated. These instructions will take effect when the current Cadet Class is promoted (roughly February 2014). Refer to the [Planned Compensation State Police](#) for instructions.

The 80/20 split on IT0208 (Work Tax) should only be used for enlisted members of the PA State Police, as well as the Liquor Enforcement Officers at the State Police who work in Philadelphia. The 80/20 split should not be applied to IT0208 unless the agency specifies it. When creating the record, the start date of the IT0208 record should be the beginning of the pay period in which the action date falls.

The IT0207 record should reflect PA (100%) unless the employee resides in Philadelphia. In this case, the tax area on IT0207 should reflect Philadelphia (PBKX).

When an employee's IT0208 is being taken out of the 80/20 split, the IT0207 PA record should also be updated to reflect the employee's actual residence tax area.

PSP enlisted members with a current service date prior to 4/1/86 should be exempt from Employee and Employer Medicare Tax on IT0235.

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.

Deputy Wildlife Conservation Officers are considered volunteers. If an employee is transferring from a Deputy Wildlife Conservation Officer to another position these actions should be completed as a Dual Hire. (example James Fittry E#687719 being transferred from a Deputy Wildlife Conservation Officer to a Transportation Construction Inspector)

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 promoted from a Transportation Equipment Operator B to a Highway Foreman 2 within the Dept of Transportation, effective 5/5/12. **Note:** this action should NOT be processed if the effective date is before the [Earliest Retroactivity Date](#).

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 employee's personnel number, the effective date and select either **Promotion, Demotion** or **Reassignment**; in this example we will select *Promotion*.

Remember: The effective date should be the Saturday or Sunday after the losing agency's pay period. In this case, the employee is staying in the T3 pay area, and the T3 pay period ended on Friday 5/4/12, so the effective date is Saturday 5/5/12.

Click Execute 

Personnel no.	1460
Name	Terry A Short
EE group	P Permanent
EE subgroup	F7 Full-time 75
From	05/05/2012
Personnel Actions	
Action Type	
Return from Furlough	
Promotion	

- 3** **INFOTYPE 0000**
Enter the action reason.
01 = standard payrate
02 = payrate exception

You will need to use a payrate exception if the employee is switching Pay Groups (example: ST to MA).

Enter the position number from the PAR.

EE group	P Permanent	7803 Transportation Pysl A
EE subgrp	F7 Full-time 75	AJ11 AFSCME J1 OT
Start	05/05/2012 to	12/31/9999
Personnel action		
Action Type	Promotion	
Reason for Action	01 Standard Payrate	
Status		
Customer-specific	Active	
Employment	Active	
Special payment		
Organizational assignment		
Position	00217325	Highway Foreman 2
Personnel area	7803	Transportation Pysl Area 3
Employee group	P	Permanent
Employee subgroup	F7	Full-time 75

Click Enter 
Save 

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INFOTYPE 0001

All fields default from the position; verify.

Change the **Time Admin** code to match the PAR, if needed.

If EE is transferring from the Attorney General's Office or the Auditor General's Office you will need to also update the PayrAdmin Code to BCP

Maintain text

Remember, if changing pay areas mid-pay period, you must create a second line of history via PA30 (see [page 2](#)).

EE group	P	Permanent	7803	Transportation Pyrl Area 3	TR Luzerne Co
EE subgrp	F7	Full-time 75	AJ11	AFSCME J1 OT	Trnspt Equip Opr
Start	05/05/2012	to	12/31/9999		
Enterprise structure					
CoCode	COPA	COMMONWEALTH OF PA			
Pers.area	7803	Transportation Pyrl Area 3	Subarea	BJ24	AFSCME J2
Cost Ctr	78PYRLDFLT	PAYROLL DEFAULT	Bus. Area	78	Transportat
Personnel structure					
EE group	P	Permanent	Payr.area	T3	Pay Group 3
EE subgroup	F7	Full-time 75	Contract	Salary	
Organizational plan					
Percentage	100.00	Assignment			
Position	00217325	91020			
Job key	00910200	91020			
Org. Unit	00080430	TRHA0430			
			Administrator		
			PersAdmin		
			Time		
			PayrAdmin		
			BCP BCPO		

Click Enter 

Save 

5

You will be asked to create the vacancy for the old position on the effective date. You will also be prompted to delimit the vacancy of the new position. **Verify the dates**

Create Vacancy

S 301018 Transportation Equipment Operator B

Create on 05/05/2012

Yes No Cancel

Click

6 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, Vital Statists Registrars
- 1** for non-perm employees and Annuitants
- 7** for DOT employees with a work schedule that begins with 'CMR' and 'CFTX7015'
- And for Game Commission employees assigned as Wildlife Conservation Officers
- 9** for permanent employees (wage OR salary)

EE group	P	Permanent	7803	Transportation Pysl Area 3	TR Luzerne Co
EE subgrp	F7	Full-time 75	BJ24	AFSCME J2 OT	Hwy Frmn 2
Start	05/05/2012	To	12/31/9999		
Work schedule rule					
Work schedule rule	CMR07015	MORIS 75 1 WK			
Time Mgmt status	7 - Time evaluation of actual times w/full pay				
Working week	Working week Saturday				
Additional time ID					

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

In this example, since the work schedule begins with 'CMR' we will use TMS 7; and since this promotion is for DOT, we will remove the '01' Additional Time ID.

Click Bypass 

OR

Click Enter 
Save 

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*
- 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*

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

unless work sched-
ule is **BNOHR**

If IT0007 is saved, future-dated absences on IT2001 will be individually presented. **BYPASS.**

Effective **December 4, 2016** DOC Laurel Highlands
And DOC Somerset will go live with FTE. **This only impacts BU H1—Correction Officer Trainees, Corrections Officer 1 and Correction Officer 2 and BU H3—Corrections Officer 3 and Correction Officer 4**

Note: If there are no changes to the work schedule rule, to the bi-weekly hours (i.e. 75 to 80) or to the time mgmt status, it is safe to bypass this screen. **If an employee is going from non perm to perm IT0007 should not be bypassed even if the work schedule is not changing. This is so you can update the TMS code as needed.**

Prior to bypassing you will want to review each individual absence to make sure there is no text maintained for that specific absence. If there is you will need to take a screen shot of the text and indicate which absence it goes with on a separate word document prior to deleting the future dated absences.

Future-dated substitutions on IT2003 will be individually presented. **BYPASS**

7 INFOTYPE 0027

Everyone has an STy02 but not everyone has an STy01. The only employees who have an STy01 are:

- Probation and Parole (They are funded by Corrections)
- Separated Employees (They will have an end date 12/31/9999 once the action is processed.)
- Employees who are out on loan to a different agency (Must have a Memorandum of Understanding)

Per an [email](#) from Lisette Lindsay on June 27, 2018:
 As of 7/1/18, any HR and IT employees in P&P, are funded by Executive Offices (BA81).
 The STy01 line should be end dated as of 6/30/18. Sty 02 should then show BusA as 81.

If an employee is leaving or entering Probation and Parole OR, if the employee is out on loan to a different agency, review the IT0027 STy01.

If EE is leaving P&P or going back to the original agency, then the Sty01, line must be delimited. If this does not present in the PA40, you will need to delimit the line in the PA30 after the action is completed.

If EE is moving into P&P or on loan to a different agency, then the STy01 line must be created in PA30 after the action is completed.

Overview Cost Distribution (0027)

Personnel No: [redacted] Active: [] Payr.area: 23
 EE group: P Permanent 25 Probation & Parole PP Northwest Gen Unt 4
 EE subgrp: F8 Full-time 80 AG41 AFSCME G4 OT Pri Agt 2
 Choose: 01/01/1800 To: 12/31/9999 STy.: []

Dist.	Name	Start Date	End Date	CoCd	BusA	Cost Center	Cctr text	Prcnt
01	Wage/Salary	07/01/2018	12/31/9999	COPA	11	1151344000	Nrthwest Gen ...	100.0
01	Wage/Salary	12/17/2017	06/30/2018	COPA	11	1151344000	Nrthwest Gen ...	100.0
02	Travel expenses	07/01/2018	12/31/9999	COPA	25	2551414000	Nrthwest Gen ...	100.0
02	Travel expenses	06/15/2018	06/30/2018	COPA	25	2551414000	Nrthwest Gen ...	100.0
02	Travel expenses	12/17/2017	06/14/2018	COPA	25	2551414000	Nrthwest Gen ...	100.0

8 INFOTYPE 0552

Save this screen for BU-covered employees, EXCEPT:
 CIVEA union (Corrections), PSEA/NEA union (L&I).

BYPASS for/if:

- management employees
- unclassified employees
- confidential employees
- bargaining units **L1, E4 or E7**
- the job class remains the same (for reporting)

Verify the job code matches IT0001.
 If the employee is being promoted to a management or confidential position, you must delimit this record via PA30, after the action is complete.

EE group: P Permanent 7803 Transportation Pysl Area 3 TR Luz
 EE subgrp: F7 Full-time 75 BJ24 AFSCME J2 OT Hwy Fr
 Start: 05/05/2012 To: 12/31/9999

Time specifications/employment period
 Time spec. JOB Job Seniority
 Do not evaluate

Duration of validity period / Imputable period
 Years: 0 / Years: []
 Months: 0 / Months: []
 Days: 0 / Days: []

Comments

Additional fields
 Job: 910200 Hwy Frmn 2

Military seniority on IT0552 should not be ended. The employee is always entitled to the Military seniority, if entered.

Management and confidential employees should never have a current seniority record.
 If this action is the result of a [reclass](#), you must update the job code on IT0552 via PA30 (see [page 12](#)).

Click Enter 
 Save 

9 INFOTYPE 0000

Change the **Reason for Action** accordingly.

02	Jobs Different, Pos. Same
03	Jobs Different, Pos. Different
04	Jobs Same, Position Different
05	Jobs Same, Position Same

EE group	P	Permanent	7803	Transportation Pysl Area
EE subgrp	F7	Full-time 75	BJ24	AFSCME J2 OT
Start	05/05/2012	to	12/31/9999	
Personnel action				
Action Type	No Change in Organization			
Reason for Action	03	Jobs Different, Pos. Different		

In this example, the job title and position number are both changing, so you will select '03'.

Click Enter 
Save 

10 INFOTYPE 0008

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

For payrate exceptions, you will be able to change the **Pay Level** and hourly rate, if applicable (*IT0008 will lock for Salary & Time approval*).

In this example, the employee is going from ST04 level 16 to ST05 level 14.

Maintain text. (continued onto next page)

EE group	P	Permanent	7803	Transportation Pysl Area 3	TR Luzerne Co
EE subgrp	F7	Full-time 75	BJ24	AFSCME J2 OT	Hwy Frmn 2
Start	05/05/2012	to	12/31/9999		
Subtype					
		0	Basic contract		
Pay scale					
Reason			Cap.util.lvl	100.00	
PS type	ST	Standard	WkHrs/period	75.00	Bi-weekly
PS Area	CW	Commonwealth			
PS group	ST05	Level 14	Ann.salary	44,91	
Wage Type Long Text					
1100	Regular Hourly Comp		22.96	USD	I <input checked="" type="checkbox"/>
				USD	<input type="checkbox"/>

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

If you are processing an action and **IT0008 locks**, you need to **monitor the record** until it is **approved/disapproved**. You can close your EPAR, but you need to put comments when closing stating that the IT0008 record is locked pending approval. Please make sure these are unlocked/approved timely so that the employee gets paid correctly.

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 



INFOTYPE 0041

If nothing is to change on this screen, it is safe to bypass.

In this example, the employee does not get a Z8 date per the position.

Z1, Z2 and Z6 dates will default.

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).

If employee is going into a position that does not have a Performance Cycle 'A' the **Z8 date** will need removed. A Z8 date needs added or updated on IT0041 for all promotions/demotions/reassignments except:

When the EPR cycle on the position is not "A", when going into the same job class and the position number remains the same, or when the agency specifically requests no change to the z8 date.

ZC date-bargaining units **L1, E4 or E7** use a ZC date on IT0041. If the employee is moving out of one of these bargaining units the ZC date will need removed from IT0041. If the employee is going into one of these bargaining units a ZC date will need to be added. The date should reflect the date of the action.

If a ZT date exists on the IT0041 record the ZT date should NOT be removed when the Promotion/Demotion/Reassignment action is processed.

ZB date The ZB date should ONLY be updated for H1 employee's going from a "Trainee" job to a working-level job (mainly promotions). An example is when a CO1 is being promoted to a CO1. The date should reflect one year from the promotion date. The day of the month should always reflect the 1st day of the month. For all other actions, only update the ZB date if the agency advises that it should be updated. You should not update the ZB date when an EE is going from a CO1 to a CO2.

EE group	P	Permanent	7803	Transportation Pysl Area 3	TR Luzerne Co
EE subgrp	F7	Full-time 75	BJ24	AFSCME J2 OT	Hwy Frmn 2
Start	05/05/2012	to	12/31/9999		
Date Specifications (0041)					
Date type	Date	Date type	Date		
Z1 Current Service date	09/12/1994	Z2 Adj Leave Service	09/12/1994		
Z3 Longevity Date	01/01/2012	Z6 Original Hire Date	02/06/1989		

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

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

Note: for **DEP** only, use the Z8 date as specifically indicated on the PAR. If DEP does not specify a date, **it should always be an August date of the following year.**

Click Bypass 

OR

Click Enter 
Save 

12

INFOTYPE 0016

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

Enter the 5 digit civil service cert# or BSE# per the PAR (*civil service jobs require a Cert#; contact the agency if the Cert# is not listed on the PAR*).

No cert # is required if the employee is being reassigned from one position to another position in the same bureau.

*Also, if an employee **and** their position are moving from one organization to another (commonly done in DHS).*

SAVE even if no changes are made.

Remember: NCS DOC: Use 'NCS-Prob' for BU-covered positions and 'NCS' for management positions. IT0019 will need to be created.

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

EE group	P	Permanent	7803	Transportation
EE subgrp	F7	Full-time 75	BJ24	AFSCME J2 OT
Start	05/05/2012	to	12/31/9999	
Contractual regulations				
Contract Type	NCS - Prob (union)			
Periods				
Probationary Period				
CS Cert / Probation Data				
Union Probation Period	6	MONTHS		
Civil Service certification no.				
Bureau of State Employment no.				

IT0019 will not be presented during the action for NCS positions; create it via PA30 after the action is complete.

TCP Contractual Probationary period—Upon attaining permanent status as a Clerk 1 or Clerk Typist 1, an employee who has worked 975 hours or more as a pool employee will serve a 90-calendar day probationary period. Employees who have worked less than 975 hours as a pool employee, or who have attained permanent status in a job other than a Clerk 1 or Clerk Typist 1 classification, will serve a 6-month probationary period.

Click Enter 
Save 

13

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	7803	Transportation Pysl Area 3	TR Luzerne Co
EE subgrp	F7	Full-time 75	BJ24	AFSCME J2 OT	Hwy Frmn 2
Start	05/05/2012	to	12/31/9999	Changed on	05/14/2012 P0068227
Address type	Paycheck Location				
CDC Data					
Check Distribution Code	0008888	Mail to employee's home mail address			
Delivery Location Name					
Address Line 1					
Address Line 2					
City					
Region					
Postal Code					

14

INFOTYPE 0208

Verify the work tax area.

Enter *100%* in the **Allocation** field.

Remember: When IT0208 already exists with 100% allocation, you must delimit the current record before adding a new record with the correct information. During the action, input the correct percentage of the time the employee works in this location. Enter and save, then a message will appear that says "work percentages cannot exceed 100%" and it lists the dates. Select the correct error(s), delimit the prior work tax, then green arrow back; you will return to the original screen.

Click Enter 
Save 

EE group	P	Permanent	7803	Transportation Pyr
EE subgrp	F7	Full-time 75	BJ24	AFSCME J2 OT
Start	05/05/2012	to	12/31/9999	
Work tax data				
Tax Area	PCB5 Wilkes Barre			
Allocation	100.00 %			
Tax Authorities in Area				
Tax ...	Description	T...	Description	
PA	Pennsylvania	B	State	
PCB5	Wilkes Barre	D	City	

Note: Philadelphia is the **ONLY** municipality that can be listed as less than 100%. The remaining percentage should be indicated on an additional record using the tax area **PA**, not another municipality. In these cases, you must also change the employee's residence tax area to reflect **PA**, not the municipality in which the employee resides.

15

INFOTYPE 0014 and 0015

In most cases, you will bypass these screens.

If EE is moving out of the union and there is a "Emp Supp Life-PSCOA" record this will need to be delimited.

PAC deductions for Probation & Parole employees must be delimited via PA30

Note: PAC deductions **should be** delimited if an employee is moving out of the union they are paying the deductions to. Please reference [PAC Deductions](#) to which unions have the language that reference the PAC deduction. Other unions not on this list do not have language in their agreements so we would leave the deductions as is.

Since most moves are at the beginning of the pay period, the deduction should be stopped at the end of the previous pay period. For mid pay period moves, the deduction should stop at the current pay period (**even if transaction effective date is retroactive**). (click [here](#) for more information).

Click Bypass 

OR

Click Enter 
Save 

EE group	P	Permanent	7803	Transportation Pyr	Area 3	TR Lu
EE subgrp	F7	Full-time 75	BJ24	AFSCME J2 OT		Hwy
Choose	01/01/1800	to	12/31/9999	STy.		
Wage type	Wage Type Long Text	From	To	O	Amount	
4620	Home/Auto Ins	01/30/2010	05/11/2010	A		
4620	Home/Auto Ins	01/16/2010	01/29/2010	A		
4620	Home/Auto Ins	09/12/2009	01/15/2010	A		
4620	Home/Auto Ins	08/29/2009	09/11/2009	A		

EE group	P	Permanent	7803	Transportation Pyr	Area 3	TR Luzern
EE subgrp	F7	Full-time 75	BJ24	AFSCME J2 OT		Hwy Frmn
Choose	01/01/1800	to	12/31/9999	STy.		
Wag...	Wage type long text	Date	O/Amount	Crcy	I	N
5700	General Pay Increase	09/02/2008	500.00	USD		
5703	Signing Bonus Payme..	07/01/2007	1,250.00	USD		

IT0014 **CUSA DEDUCTIONS**—CUSA Individ Membership. This is a deduction for "Corrections USA" dues and if the EE is no longer in the H1 bargaining unit, the deduction should be delimited.

IT0014 **Forensic Pay**— should be delimited if the EE is moving to a position that is not forensic. See page 6 (**SEIU – Article 25, Section 8 b (4)**).

IT0015 will only be displayed if the employee has future-dated additional payments; generally, you will bypass.

Click Bypass 

16

INFOTYPE 0057

Verify and/or change the union status accordingly.

- 1 = Union Dues
- 2 = Non-Member

Save this screen for BU-covered employees; EXCEPT: CIVEA union (Corrections), PSEA/NEA union (L&I)

BYPASS for (if presented):

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

If the employee is being promoted to a management or confidential position, you must delimit this record via PA30, after the action is complete.

If the employee is changing unions, you must delimit the old union record.

Click Bypass 

OR

Click Delimit 

THEN

Click Enter 

Save 

EE group	P	Permanent	7803	Transportation Pysl Area 3	TR Luz
EE subgrp	F7	Full-time 75	BJ24	AFSCME J2 OT	Hwy Fr
Start	05/05/2012	to	12/31/9999		
Payment data					
Member type	AFSCME - Am Fed of State, Cnty, Mun EE's				
Wage Type	4U01	AFSCME - 13 Union Dues			
Additional Data					
Status	1				
Local	2370				

Create Membership Fees (0057)

Personnel No	753454			Active	
EE group	P	Permanent	2103	Human Services Pysl Area 3	HS Sel P
EE subgrp	F8	Full-time 80	AN11	AFSCME N1 OT	Aide Trn
Start	08/13/2018	to	12/31/9999		
Payment data					
Member type	AFSCME - Am Fed of State, Cnty, Mun EE's				
Wage Type	4F01	AFSCME-13 Non-Member			
Additional Data					
Status	2				
Local	0166				

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INFOTYPE 2012

If there are no changes to the employee group or bi-weekly hours, it is safe to bypass this screen.

If any of these three scenarios occur, or a combination of all:

- Part-time to full-time, or vice versa
- Non-permanent to permanent, or vice versa
- 75 to 80, or vice versa

You must increase or decrease the appropriate amount of holiday quota, **as of the effective date** (refer to [Holiday Entitlement Worksheet](#)).

Use the effective date of the action as both the start and end dates.

Use a **minus sign** if decreasing the quota; consult with a specialist if needed.

Click Bypass 

OR

Click Enter  **d**

Save 

EE group	P	Permanent	7803	Transportation Pysl Area 3
EE subgrp	F7	Full-time 75	BJ24	AFSCME J2 OT
Start	05/05/2012	To	05/05/2012	
Time transfer specification				
Time transfer type	QHOL	Anticipated Holiday hours		
Number of hours		Hours		

*****For Perm to Non-Perm only, use the day before the effective date to reduce the amount of QHOL*****

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INFOTYPE 0329 (Supplementary Employment)

If there is no supplementary employment for this EE, you can Bypass this record.

Click Bypass 

If an employee has an existing record, make sure to copy the record and change the start date to the date of the action and green check and save.

If a Supplementary Form is not attached to the EPAR, save this infotype but in the comments of the EPAR indicate "EE needs to complete a new Supplementary Form." When the infotype comes up and there is a Supplementary Form attached to the EPAR you need to just verify the company name to make sure no changes are happening, change the start date to reflect the date of the action and green check and save. The record should present itself in copy mode you do not want to change the current record.

If a Supplementary Form is attached to the EPAR and this infotype did not come up during the action you will need to go back in via a PA30 and create the infotype effective the date of the action.

Click Enter 

Save 

Create Supplementary Employment (0329)

   | Planned Working Time Date Monitoring

Personnel No	30004133	John Snow	Active	Payr.area	22
EE group	P Permanent	2102 Human Services Pysl Area 2	HS Wstrn Rgn		
EE subgrp	F7 Full-time 75	FF41 PSSU F4 OT	Mr Lcnsng Rep		
Valid	03/27/2017	to	12/31/9999		

Sideline Job/Second Job/Honorary Post

Sequence Number	<input type="text"/>	Applic. Date	<input checked="" type="checkbox"/>
Approval	<input type="text"/>	Approved On	<input type="text"/>
Telephone Number	<input type="text"/>		

Additional fields

<input type="checkbox"/> Revocation Indicator			
Disapproval Reason	<input type="text"/>		
Work Days/Hours	<input type="text"/>		
Type of Business	<input type="text"/>		
Type of Position	<input type="text"/>		
Comp/Bus Name	<input checked="" type="checkbox"/>		
Street	<input type="text"/>		
City	<input type="text"/>		
State	<input type="text"/>		
Postal Code	<input type="text"/>		
Company Conflict	<input type="radio"/> Yes	<input checked="" type="radio"/> No	
Self Employment Conflict	<input type="radio"/> Yes	<input checked="" type="radio"/> No	
Potential Political Conflict	<input type="radio"/> Yes	<input checked="" type="radio"/> No	

INFOTYPE 2001

This Infotype is presented **twice**; once after IT0007 to list all future-dated absences with an opportunity to save or bypass, then again after IT2012 for an opportunity to delete.

Until further instruction is provided:

1st Time—**BYPASS**

2nd Time—**BYPASS IF:**

- Bi-weekly hours (i.e. 75 or 80) remains the same,
- Work schedule rule remains the same
- Employee is staying within the same agency
- **All the 3 reasons listed above must apply in order to Bypass**

2nd Time—**DELETE IF:**

- Bi-weekly hours (i.e. 75 to 80) are changing; **OR**
- Employee is changing agencies

2nd Time—**SAVE IF:**

- The **only** time you will save is when **Only** Work Schedule Rule is changing

Prior to deleting the absences you will want to review each individual absence to make sure there is no text maintained for that specific absence. If there is you will need to take a screen shot of the text and indicate which absence it goes with on a separate word document prior to deleting the future dated absences.

If deleting:

- Take a screen shot of the absences
- Paste into a Word document
- Title it "Absences Deleted [date]"
- Attach it to the closed PAR and note. **This is so the agency knows which absences have been deleted.**

Click Bypass 

OR

Click Delimit 

EE group	P	Permanent	7803	Transportation Pyrl Area 3	TR	Luz
EE subgrp	F7	Full-time 75	BJ24	AFSCME J2 OT		Hwy Fr
Choose	05/05/2012	To	12/31/9999	STy.		Delin
Absences (2001)						
	Start Date	End Date	Abse.	Att./abs. type text	From	To
	12/25/2012	12/25/2012	H	Holiday/Comp lieu Holiday		
	11/23/2012	11/23/2012	H	Holiday/Comp lieu Holiday		
	11/22/2012	11/22/2012	H	Holiday/Comp lieu Holiday		
	11/12/2012	11/12/2012	H	Holiday/Comp lieu Holiday		
	10/08/2012	10/08/2012	H	Holiday/Comp lieu Holiday		
	09/03/2012	09/03/2012	H	Holiday/Comp lieu Holiday		
	07/04/2012	07/04/2012	H	Holiday/Comp lieu Holiday		
	05/28/2012	05/28/2012	H	Holiday/Comp lieu Holiday		

In cases where you will delete, be sure to delete **ALL future dated** absences, including holidays, **even if the PAR requests otherwise**. Be sure to highlight **ALL** records **before** deleting.

Military Absences

NOTE: For **Military** absences if the hours worked do not change (i.e. 75 or 80), then we would not touch the military absence. If the hours worked changes (i.e. 75 to 80) then you would bypass the **Military** absence and create a CRM case to alert Employee Services that they need to resave (full day) or reenter the absences (partial day).

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INFOTYPE 2002 AND 2003

The same rules apply to future-dated substitutions and/or attendances as with the absences.

Until further instruction is provided:

1st Time—**BYPASS**

2nd Time—**BYPASS IF:**

- Bi-weekly hours (i.e. 75 or 80) remains the same
- Work schedule rule remains the same
- Employee is staying within the same agency

2nd Time—**DELETE IF:**

- Bi-weekly hours (i.e. 75 to 80) are changing;
- Employee is changing agencies

2nd Time—**SAVE IF:**

- The **only** time you will save is when **Only** Work Schedule Rule is changing

If deleting:

- Take a screen shot of the substitutions and attendances
- Paste into a Word document
- Title it "Substitutions/Attendances Deleted [date]"
- Attach it to the closed PAR and notate.
- **This is so the agency knows which absences have been deleted.**

EE group	P	Permanent	7803	Transportation Pysl Area 3	TR	Luzerne
EE subgrp	F7	Full-time 75	B124	AFSCME J2 OT		Hwy Frmn 2
Choose	05/05/2012	To	12/31/9999	STy.		Delimit.d
Attendances (2002)						
Start Date	End Date	Atte...	Att./abs. type text	From	to	P
05/23/2012	05/23/2012	RT	Regular Time	00:00	07:30	
05/22/2012	05/22/2012	RT	Regular Time	00:00	07:30	
05/21/2012	05/21/2012	RT	Regular Time	00:00	07:30	
05/18/2012	05/18/2012	RT	Regular Time	00:00	03:30	
05/18/2012	05/18/2012	RT	Regular Time	03:30	07:30	
05/17/2012	05/17/2012	RT	Regular Time	00:00	04:30	
05/17/2012	05/17/2012	RT	Regular Time	04:30	07:30	
05/16/2012	05/16/2012	RT	Regular Time	00:00	07:30	
05/15/2012	05/15/2012	RT	Regular Time	00:00	08:30	
05/14/2012	05/14/2012	RT	Regular Time	00:00	07:30	
05/11/2012	05/11/2012	RT	Regular Time	00:00	07:30	
05/10/2012	05/10/2012	RT	Regular Time	00:00	03:30	
05/10/2012	05/10/2012	RT	Regular Time	03:30	07:30	

In cases where you will delete, be sure to delete **ALL future dated** substitutions and attendances, **even if the PAR requests otherwise.** Be sure to highlight **ALL** records **before** deleting.

Click Bypass 

OR

Click Delimit 

Post-Transaction—PA30

For employees going from non-permanent to permanent, you will need to reinstate benefits and SERS via HRBEN0001. To do this, you must first create a record on IT0378, then confirm the record on IT0171.

Note: Some non-perms are already enrolled in SERS; no need to re-enroll.

INFOTYPE 0378, Subtype JCHA

Enter IT0378, subtype JCHA.

Select the radio button next to

Period and enter the effective date in the **From** field.

Click Create 

EE group	P	Permanent	7803	Transportation P
EE subgrp	F7	Full-time 75	BJ24	AFSCME J2 OT
Start	05/05/2012	to	12/31/9999	
Adjustment Reason Data				
Benefit area	CoPA			
Adjustment reason	Job Status Change			

Click Enter 
Save 

EE group	P	Permanent	Pers.area	7803	Transportation Pyl Area 3
EE subgroup	F7	Full-time 75	Cost Center	78PYRLDFLT	PAYROLL DEFAULT
Basic personal data Employment data Gross payroll Net payroll Tax data Benefit data					
Infotype text	St		Period		
Personal Data (0002)	<input checked="" type="checkbox"/>		From	05/05/2012	To 12/31/9999
Addresses (0006)	<input checked="" type="checkbox"/>		<input type="radio"/> Today <input type="radio"/> Curr. week <input type="radio"/> All <input type="radio"/> Current month <input type="radio"/> From curr. date <input type="radio"/> Last week <input type="radio"/> To Current Date <input type="radio"/> Last month <input type="radio"/> Current Period <input type="radio"/> Current Year		
Family Member/Dependents (0021)	<input checked="" type="checkbox"/>		Choose		
Bank Details (0009)	<input checked="" type="checkbox"/>				
Additional Personal Data (0077)	<input checked="" type="checkbox"/>				
Communication (0105)	<input checked="" type="checkbox"/>				
Residence Status (0094)	<input checked="" type="checkbox"/>				
Other/Previous Employers (0023)	<input checked="" type="checkbox"/>				
Residence Tax Area (0207)	<input checked="" type="checkbox"/>				
Direct selection					
Infotype	Adjustment Reasons (0378)		STy	JCHA Job Status Change	

Note: After enrolling the employee in SERS, SAP delimits IT0378, Subtype JCHA record. You **must** go back to IT0378, Subtype JCHA to change the end date back to 12/31/9999.

Repeat the same steps using **IT0378, subtype RETR**. This will bring the appropriate retirement codes into HRBEN0001.

INFOTYPE 0171

Confirm the **1st Program Grouping** matches the employee's home county. Confirm the **2nd Program Grouping** matches the employee group. The PAR should indicate what this is.

This brings the appropriate benefits codes into HRBEN0001.

Click Enter 
Save 

EE group	P	Permanent	7803	Transportation
EE subgrp	F7	Full-time 75	BJ24	AFSCME J2 OT
Start	05/05/2012	to	12/31/9999	
General Benefits Information (0171)				
Benefit area	PA	CoPA		
1st Program Grouping	40	Luzerne		
2nd Program Grouping	01	Full Time		

2.PG	2nd ProgrGroup. Text		
01	Full Time	12	FT LSC w/ H&W
02	Full Time SP	13	No Benefits
03	EAW	14	<978Hr PTLSC w/o H&W
04	Part-Time 40 hours	15	PT LSC w/o H&W
05	III' s	16	FT LSC w/o H&W
06	Perm PT < 50%	21	III > 1900 and Life
07	<978 Hr PTLSC w/ H&W	24	III > 1900 & no Life
09	Temp w Retirement	25	III 950-1900 no Life
10	PT LSC w/ H&W	26	III < 950 & no Life
11	Part Time 37.5 hours		

Go to HRBEN0001 to enroll.

Remember, if the employee is moving to or from an age 50/55 retirement job class, you must change the retirement status via HRBEN0001 after the action is complete.

Check IT0169 to ensure the record updated properly.

Important: Non-permanent EAWs in the Dept of Public Welfare and IIIs in Labor & Industry are only eligible for supplemental benefits, based on hours worked. When transferring into a **permanent** position, their other benefits (medical, annuitant health and life insurance) must be manually created via HRBEN0001. Click [here](#) for detailed instructions on enrolling EAWs and IIIs in benefits. This document is also located in the *Agency-Specific Information* folder on the Portal.

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**

EE's moving **into** the H1 bargaining unit—Manually update the annuitant health record with Dependent Coverage Code EE2 using the appropriate effective date (date of action).

EE's moving **out** of the H1 bargaining unit—The July Annuitant health record will exist for EE2 so the Dependent Coverage Code on this line needs to manually changed to reflect Dependent Coverage Code EE using the appropriate effective date (date of action).

INFOTYPE 0167

The following should not have a SEAP record ([Benefit Alert 2011-08](#)):

- PA Port Authorities
- National Guard
- Official/Board Member, except for EE subgroup E-7
- Other/Volunteer, except for EE subgroup U-9
- Annuitant
- Health Registrar
- External Persons
- Conservation Corps

Note: If someone is transferring from Auditor General, a SEAP record will not already exist and will need to be created.

INFOTYPE 0168

Review for all Employee's going from Non-Permanent to Permanent to ensure that when IT0168 is created that it creates with the correct GLI. It should be the amount they are making in their permanent position since as a non-permanent employee they are not entitled to GLI. If not you will need to input a salary override by clicking on line containing the incorrect GLI amount, select copy, change end date to 12/31/XXXX (current year) click on Insurance Coverage Tab and in the Salary Override field, enter the new annual salary. Green check and save. Check your work. There should now be two lines of history: one with an end date of 12/31/XXXX with an override and one with 01/01/XXXX to 12/31/9999 without the override. This will need to be done after IT0008 has been unlocked by OA Salary & Time. **Note:** salary overrides are not necessary for employees ages 70 and older. **Note:** If an employee is hired as a permanent part-time EE IT0168 should reflect the full salary from IT0008 because the part time doesn't change GLI because the person is eligible for life insurance as long as he/she is a permanent employee.

INFOTYPE 0169

Review for all Promotion, Demotion and Reassignment actions to ensure they are not transferring between an Age 50 and Age 60 retirement position/job or vice versa. If Employee is transferring between Age 50 and Age 60 retirement or vice versa you will need to create an IT0378 STY RETR effective the date of the action and then go through the HRBEN0001 to enroll them in the correct Retirement Plan.

INFOTYPE 0001

Retroactive actions where future dated military actions are involved you will need to copy IT0001 records created by retro action to create additional lines on IT0001. Add text to indicate that the record was updated to reflect the new position number.

INFOTYPE 0235

If the EE is transferring from one work tax area to another and has a current LST exemption record on IT0235, the record should be ended and a new record created with the new work tax area code.

If an employee moves out of a position that is UC exempt, the exemption on IT0235 needs to be delimited the day before the effective date of the action. This should come up during the action.

INFOTYPE 0552

If the action is the result of a reclass, you must update the job code via PA30.

Enter 552, ALL > OVERVIEW.

- Select and copy the old record
- Change the start date to the effective date of the action
- Change the existing job code to the new job code
- Remove the old seniority balance

This will delimit the old seniority record.

EE group	P	Permanent	7803	Transportation Pysl Area 3	TR Luzerne Co
EE subgrp	F7	Full-time 75	BJ24	AFSCME J2 OT	Hwy Frmn 2
Choose	01/01/1800	To	12/31/9999	STy.	
TimeData Ent./Empl.Per					
Start Date	End Date	Tim...	Name	Lock	Re... Do... Years Months Days Weighti...
01/09/2004	05/04/2012	JOB	Job Se...		0 0 2,354 100.00
05/05/2012	12/31/9999	JOB	Job Se...		0 0 100 100.00

Click Enter



Save



INFOTYPE 0208

In the event that the employee's work tax area changes, you may need to change the start date of the record to reflect the beginning of the pay period in which the effective date falls.

Click Change



Change the start date.

Click Enter



Save



EE group	P	Permanent	7803	Transportation Pysl
EE subgrp	F7	Full-time 75	BJ24	AFSCME J2 OT
Start	05/05/2012	to	12/31/9999	
Work tax data				
Tax Area	PCB5 Wilkes Barre			
Allocation	100.00 %			
Tax Authorities in Area				
Tax ...	Description	T...	Description	
PA	Pennsylvania	B	State	
PCB5	Wilkes Barre	D	City	

In this case, the employee is in pay area T3—which is from 5/5 - 5/18—so the start date is 5/5, which is also the effective date. No changes are needed.

**Check the holder relationship and vacancy infotype on both positions!
If missing or incorrect, correct it.**

Locking Seniority Records

If an employee is Promoted/Reassigned/Demoted into a job class in which they previously held, there may still be a job seniority balance on those job records. You will need to zero out the balances for those previous periods, transfer them to the new period, then lock the old seniority records so the employee's seniority balance is not doubled. **Remember:** this does not apply to management positions. Seniority is calculated in days.

To make the necessary updates to Seniority click on the following link to access the seniority action guide.

[Seniority](#)

HRBEN0014

For employees going from permanent to non-permanent, their benefits must be delimited, as they are no longer eligible. You will do this via HRBEN0014.

Note: Non-permanent employees are still eligible for SEAP; **do not** delimit this record. Refer to [Benefits Alert 2011-08](#) for a list of those that are not eligible for SEAP. Remember, once enrolled in SERS, always enrolled.

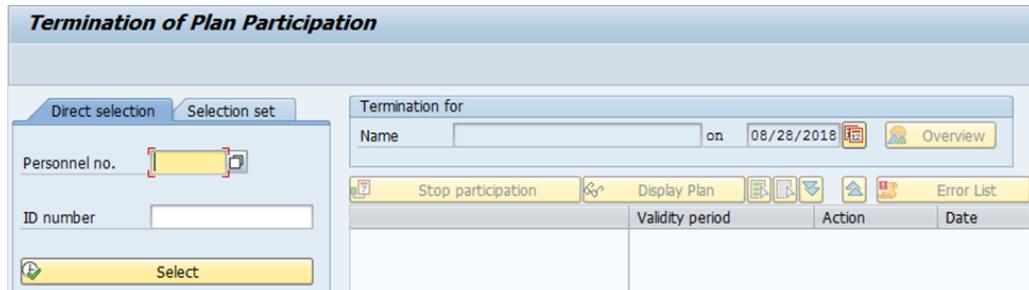
1

On the home screen of SAP, under the Benefits folder, double-click **HRBEN0014—Termination of Participation.**



2

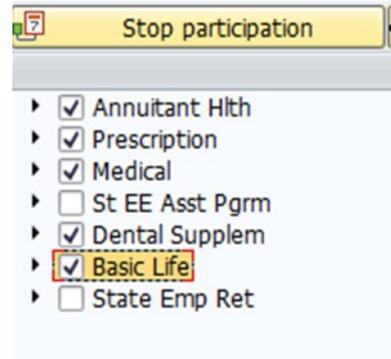
Enter the personnel number, change the date to the day prior to the effective date of the action using the date change icon.



Click Stop participation

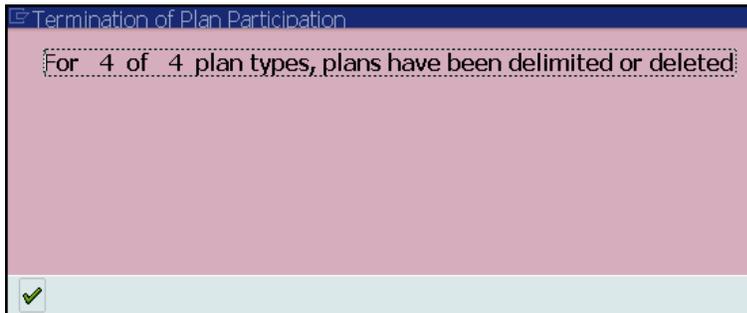
3

Place a check next to all records, EXCEPT SEAP and SERS (once enrolled in SERS, always enrolled).



Click Stop participation

The following pop-up box will appear next.



Click

4

Go back to IT0167-0169 via PA20 and confirm the records have been delimited.

References

[Personnel Rules](#)

[Civil Service Rules](#)

[Benefits Alert 2011-08](#)

[Benefits Alert 2015-03](#)

[Time Alert 2011-26](#)

[Personnel Administration Alert 2011-04](#)

[Management Directive 540.7](#)

[Standard to Management Memo](#)