



New Hire

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References

By Infotype

IT0000	IT0552	IT0009	IT0210	IT0077
IT0023		IT0006	IT0006, ST US01	IT0094
IT0002	IT0041	IT0207	IT0016	IT9009
IT0001	IT0008	IT0208	IT0019	IT0235
IT0007	IT2012	IT0209	IT0057	IT0329

Overview

There are several things you will need to determine before processing a new 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.

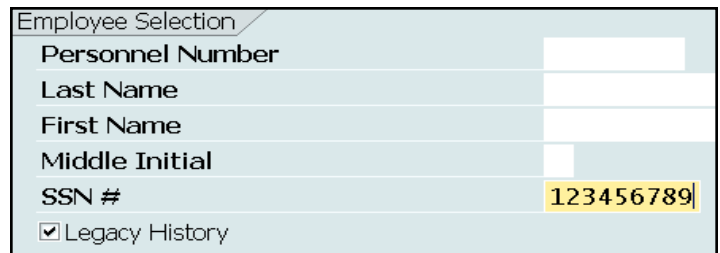
1. Has the employee ever worked for the Commonwealth? To find out:

On the home screen of SAP, under the Reporting folder, double-click **Y_DC1_32000406—Employee Locator**



Enter the employee's SSN.

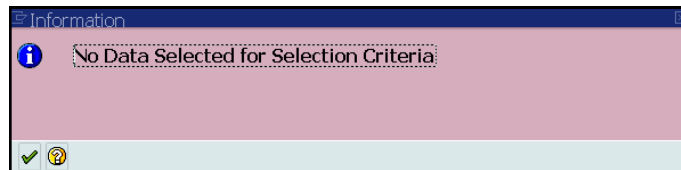
Check **Legacy History** to narrow the search.



Click Execute



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



Click

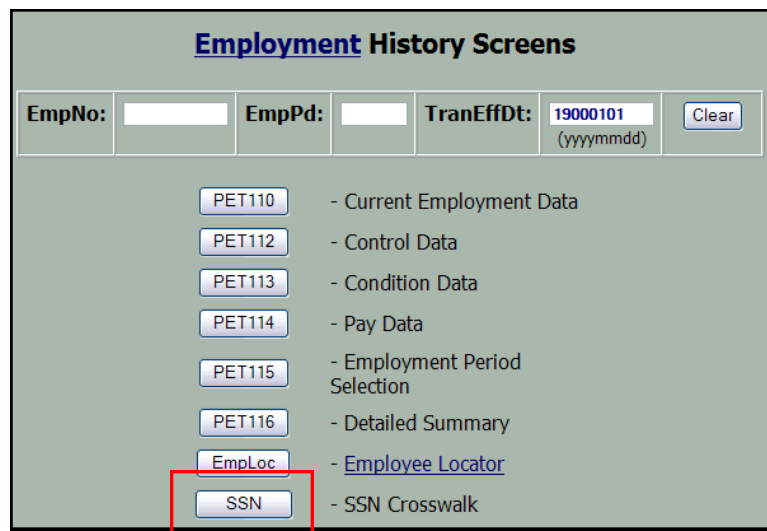


Wait! You still need to check the [Employment History Application](#) to determine if the employee worked for the Commonwealth prior to the implementation of SAP.

Log on using your Oracle username and password.

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

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

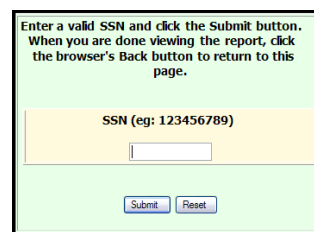


If you get results with either of these searches, that means the employee has prior Commonwealth history and already has an employee number. You will need to process the transaction as a rehire. If the existing employee number is not valid in SAP, you will first need to process an [Establish IPPS Employee](#) 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.

When processing actions for employees who are transferring from an Independent Agency not in SAP, Maintain Text to include what agency they are transferring from as well as the dates they worked there on IT000, IT0001 & IT0041.

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

When an employee transfers from an Independent Agency that we do not have a reciprocal leave agreement with but are eligible for benefits day one the effective date of the action will be a Saturday date (Please reference the [Action Effective Date Memo](#)). Please reference the [Retirement Leave Service Credit Worksheet](#) to see what counts.

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

When to Use a Payrate Exception (appt above min)

A payrate exception is to be used at the start of the new 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.

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.

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 Manual** for information on updating the employee's IT9010.

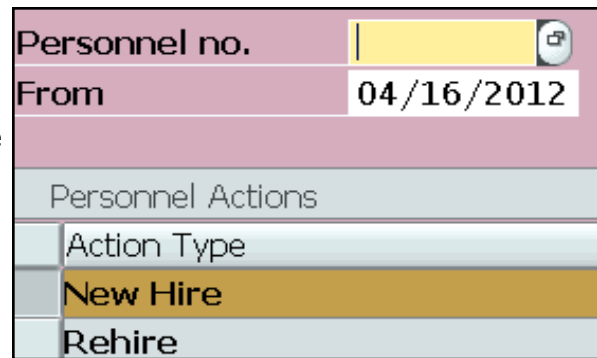
1 On the home screen of SAP, under the Personnel Administration folder, double-click **PA40—Personnel Actions**.



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

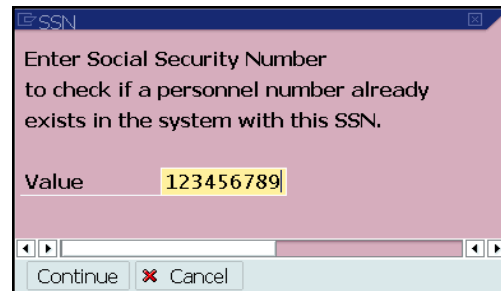
Note: Corrections employees who live or work more than 50 miles from the Elizabethtown Training Academy may start on a Sunday, to include travel time. The agency must provide some reference on the PAR to using a Sunday effective date for travel. Contact the agency to confirm this date. Otherwise, the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

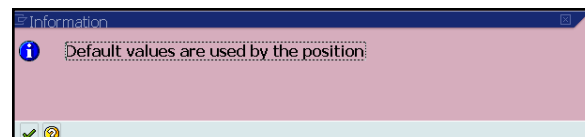
Enter the position number from the PAR.

Click Enter
Save



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

Click



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 new hire action effective 4/16/12
Payrate exception reason code used per job class

Your Name, HRSC
Date

Start	04/16/2012	to	12/31/9999
Other/previous employers			
Employer			
City			
Country Key			
Previous Salary			
Previous Salary	*****		
Prev. Employer Doc			

Click Enter 
Save 



5 INFOTYPE 0002

Enter the personal information **carefully** per employee documents attached to the PAR.

Enter the name exactly as it appears on the SS Card; if there is no card use the name on any one of the forms attached, **exactly** as the employee indicates.

If the employee only goes by one name, use 'unknown' for whichever name is not given. If unsure reach out to the agency and ask them what the EE SS card has on it. If it reflects either their first or last name as "No Name Given" we need to make sure SAP reflects that. Use upper and lower case letters, **do not** use punctuation.

Remember: Leave Marital Status blank; if it's present, REMOVE.

Click Enter 
Save 

Name	
Title	Mr
Last name	Wint
First name	Miguel
Middle name	G
Designation	
Suffix	
Name	Miguel G Wint
HR data	
SSN	123-45-6789
Date of Birth	11/17/1979
Language	English
Marital Status	
Gender	<input type="radio"/> Female <input checked="" type="radio"/> Male <input type="radio"/> Undeclared
Additional Data	
CDL Drivers Lic#	
<input type="checkbox"/> Exemption from Disclosure of Public Information	



Enter the CDL Drivers License# if the employee is being hired into a job that requires a CDL.

Note: If you discover later on—after the employee has been enrolled in SERS—that the birthdate was entered incorrectly, immediately notify [Becky Parker](#) from SERS; changes to SAP data do not get passed on to SERS. SERS must update the date of birth in their system. Once an EE starts SERS will not update the DOB unless they have a birth certificate or some proof of what the EE's DOB is. Escalate a CM case to Employee Services requesting outreach be done to obtain the correct information. Explain in the case that agency provided the wrong DOB. Date of correction should be the date of hire for the EE.

6 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						

7

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

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INFOTYPE 0007

Enter the work schedule per the PAR. If the schedule provided does not work, use a default schedule. You will need to contact the agency and then change the TMS in the PA30.

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 Statistics Registrar
- 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 'CFTX7015" 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 Oftr 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.

*unless work schedule is **BNOHR**

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*
- Effective **December 4, 2016** DOC Laurel Highlands (00114600) and DOC Somerset (00117600, 00117609, and 00117610) will go live with FTE. **This only impacts BU H1—Correction Officer Trainees, Corrections Officer 1 and Corrections Officer 2 and BU H3—Corrections Officer 3 and Corrections Officer 4**

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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				Years
Months	0				Months
Days	0				Days
Comments					
Additional fields					
Job	472000				Corr Oftr 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.

10

INFOTYPE 0041

Z1, Z2 and Z6 dates will default with the new hire effective date.

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](#)).

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*).

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

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

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

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

Agency Specific



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.

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.**

Note: 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*).

Note: Never put a Z3—Longevity Date on the IT0041 when processing an EAW for DHS, unless specifically listed on the PAR.

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

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

Click Enter 
 Save 

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

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 new hire date** (refer to the [Holiday Entitlement Worksheet](#)).

For BU **T4-T5** the system is configured to generate 7.5 hours of holiday quota for these employees for each 195 hours of active pay status, therefore **DO NOT** load any QHOL hours on IT2012 for employees in this bargaining unit (reference Time Alert 2007-09)

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.

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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 

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

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-Core. Use 'A' Payroll Check on IT0009. (Not necessary for Resident Workers)

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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 city name in its entirety. Abbreviate Road—Rd, Street—St, etc.

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 18](#)).

If the employee resides in a different state, enter '088' in the **Benefits County Code** field; submit a [CM](#) 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 

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](#)).

If the correct tax area is not given, use the matchcode to find it.

If more than one option is present (example below) select Borough, Township or City. Do not use SD, ASD or LSD.

On occasion SAP may list Borough, Township or the City along with the

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

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				

PAZ4	01/01/1980	12/31/9999	Jenkintown Borough
PAZ5	01/01/1980	12/31/9999	Jenkintown S D

SD (example below). This code may be used as long as the Borough, Township or the City is present.

		Tax level	Description
PA	Pennsylvania	A	Federal
PBVQ	South Hanover Township	D	City

Refer to [PA Alert 2015-08](#). sent in the descrip-



PBDH	01/01/1980	12/31/9999	New Britain Township - Central Bucks SD
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If you are unsure; please see a specialist or your supervisor. 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
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	

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INFOTYPE 0208


The work tax area will default based on the position.

Click Enter 
Save 

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	Correction
EE subgrp	F8	Full-time 80	HH11	PSCOA H1
Start	04/16/2012	to	12/31/9999	
Unemployment data				
Tax authority	PA Pennsylvania			
Worksite				

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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.

Click Bypass 

OR

Click Enter 

Save 

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		
Status					
Tax authority	FED	Federal		Tax level	A Federal
Filing Status	01				
Exemptions					
Allowances	1				
Tax Exempt Ind.	Not exempt			<input type="checkbox"/> IRS mandates	
Withholding adjustments					
Add.withholding		USD		<input type="checkbox"/> Non-resident tax calculation	
Default formula	01	PCT MTHD-RES. U		Alternative formula	
Additional Information					
<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).

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		
Address type					
Paycheck Location					
CDC Data					
Check Distribution Code	0008888			Mail to employee's home address	
Delivery Location Name					
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: H1 bargaining unit probationary period is 12 months

Exceptions to remember:

NCS DOC: Use 'NCS-Prob' for BU-covered positions and 'NCS' 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: New Hires and Rehire actions, place the employee in NCS - prob (union) status and leave the Union probationary period field blank.

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)*

The contract type **CS-Prob-LT/Sub/Seas** should only be used for **Temporary Clerical Pool** employee's. TCP's are always in probationary status and never retain regular CS status.

For employees being hired as a commonwealth employee, but were employees in local government and have attained regular civil service status at the local level. Although they are treated as a New Hire for everything else, they do not serve a probationary period.

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** date.

Note: DOT Seasonal Employees: New Hire and Rehire Action, do not create IT0019.

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 = Non-Member

BYPASS for (if presented):

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

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	
Payment data				
Member type	PSCOA - PA St Corr Officers Assn			
Wage Type	4F24	PSCOA - Fair Share		
Additional Data				
Status	2			
Local	0010			

24

INFOTYPE 0015

Will only present if Union Dues are chosen on Infotype 0057. Select the **yellow bypass arrow**. IT0015 and IT0014 will automatically create in the background with the appropriate amounts.

INFOTYPE 0014 and 0015—Initiation fees will no longer generate when an employee is placed into a non-member status on Infotype 0057.

25


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).

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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 

27

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**.

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. Game Farm Workers and Parks & Forestry workers) BYPASS this Infotype.

Click Enter 
Save 

*There are several jobs that are exempt from Tour 2. The PAR should specifically state that '**Approval to exclude this employee from Tour 2 of the online orientation has been granted by the HR Service Center.**' If this is on the PAR, see [Tour 2 Exemptions](#). You will need to create a CM case to have Tour 2 archived.*

INFOTYPE 0329 (Supplementary Employment)

This screen will be presented at the end of the action. If there is no Supplementary Employment Form attached, click bypass.

Click Bypass 

If the form is attached, but no verdict has been decided, reach out to the agency to request the form be completed. Inform Ashley McHale that this has occurred.

If the form is approved or disapproved, update SAP accordingly.

1st screen shot is of the form.
2nd screen shot is of IT0329 (on next page). The numbers correlate to make it easy for you to know which fields need filled out and where to find the information on the form.

Supplementary Employment Form, Second Section

THE FOLLOWING QUESTIONS PERTAIN TO THE REQUESTED SUPPLEMENTARY EMPLOYMENT, INCLUDING SELF-EMPLOYMENT

Name of Company or Organization: **1**

Address of Company or Organization
 Street: **2** City: **3** State: **PA 4** Zip Code: **5**

Type of Business in which the company or organization is engaged: **6** Type of Position for which you are applying: **7**

Date you applied for position: **8** Date you expect to begin supplementary employment: **9** If supplementary employment will be for a limited duration, enter an end date: **10**

Briefly describe the duties of the position applied for with the company or organization:

Answer (A) and (C) or (B) and (C), whichever is applicable to your proposed supplementary employment:

A. To the best of your knowledge and belief, does the company or organization with which you are applying for a position engage in any business or activity which could possibly be related to your departmental duties, or which could possibly create an actual or apparent conflict with your departmental duties? (If yes, explain to the best of your knowledge.) **11** Yes No

OR

B. To the best of your knowledge and belief, would your self-employment involve you in any business or activity which could possibly be related to your departmental duties, or which could possibly create an actual or apparent conflict with your departmental duties? (If yes, explain to the best of your knowledge.) **12** Yes No

C. Is this organization associated with a political subdivision or is it a political subdivision of the Commonwealth of Pennsylvania; is the organization associated with an agency of the government of the United States of America? (If yes, explain to the best of your knowledge.) **13** Yes No

If you answered Yes to A, B, or C, provide additional information below:

Days Worked: Select all that apply **14** Su M Tu W Th F Sa

Approx. Start Time Hour: Min: Approx. Stop Time Hour: Min: No. of hours per week

If you work an irregular, variable, or rotating shift, please indicate and show for a two-week period the variations in your shifts and/or in the starting and stopping times.

Supplementary Employment Form, Final Section

THE FOLLOWING SECTION IS FOR USE BY THE HR SERVICE CENTER ONLY

15 Approved Disapproved

Disapproval Reason

- Adverse Interest Act
- Conflict with commonwealth job duties
- Conflict with commonwealth work hours
- Conflict of interest
- Full-time political position
- Violation of HATCH Act
- Violation of Civil Service Act
- Other

INFOTYPE 0329 Continued... Please note all fields with a star are required fields. Please make sure all fields are completed before saving.

Display Supplementary Employment (0329)

Planned Working Time Date Monitoring

Agency No: 25566 Employee: Lisa A Galic Active Payr.area: 23
 Emp. Type: P Permanent 81 Executive Offices EX Agcy Srvs Ops Div
 Emp. Grp: F7 Full-time 75 MA33 MGT A3 NPOT Hr Anl 4 (Gen)

Valid: 03/13/2017 ★ 9 to 12/31/9999 ★ 10 Chge: 03/03/2017 P00616219

Sideline Job/Second Job/Honorary Post

Sequence Number: 03 ★ 8
 Approval: ★ 15 Approved ★ 8 Applic. Date: 02/27/2017
 Approved On: 03/03/2017

If DISAPPROVED, the start date should match the end date and a disapproval reason must be selected.

Populate only for APPROVED requests using the current date

Telephone Number:

Additional fields

Revocation Indicator
 Disapproval Reason: ★ 15 Only required if DISAPPROVED

Work Days/Hours: ★ 14 DAYS SU SA START TIME 07:00 STOP TIME 12:00 H...

Type of Business: ★ 6 FOOD FOOD SERVICE
 Type of Position: ★ 7 07 RESTAURANT WORKER
 Comp/Bus Name: ★ 1 STARBUCKS
 Street: ★ 2 1 South Front Street
 City: ★ 3 Harrisburg
 State: ★ 4 PA
 Postal Code: ★ 5 17110

Company Conflict: ★ 11 Yes No
 Self Employment Conflict: ★ 12 Yes No
 Potential Political Conflict: ★ 13 Yes No

Either 11 OR 12 will be selected on the form, not both. Indicate NO for whichever option is not selected.

Position Description

If the START DATE is prior to the most recent Current Service Date on IT41, enter a start date equal to the most recent Current Service Date.

★ Indicates REQUIRED fields

Post-Transaction—PA20

Check **all** Infotypes to ensure the records were successfully created with the effective date (refer to the [Post-Transaction Checklist](#)). For permanent employees, pay special attention to the following Infotypes for benefits purposes:

IT0167, 0168, 0169
IT0171
IT0378, subtype NHIR & RETR
IT9010—for Health Care Reform

} These Infotypes drive benefits

SAP will automatically enroll the employee in *annuitant health, medical, SEAP and dental* for permanent employees.

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.

You will need to enroll the employee in retirement if eligible. Non-perms in DPW, DOT, Intermittent Intake Interviewers and employees in the Temporary Clerical Pool are eligible for retirement. If a PEBTF or FCAP enrollment form is attached to the PAR, you **must** submit a [CM](#) ticket to the Employee Services. For out-of-state employees, you will also submit a CM ticket to Employee Services for review of benefits.

Note: IT0168 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. 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.

IT0105– Even though there is no action to process in the PA40, you still need to check to make sure this was created.

Post-Transaction—PA30

Important: Non-permanent [EAWs](#) in the Dept of Human Services 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**

INFOTYPE 0169

The following employees **should be enrolled in SERS** upon hire:


- Permanent employees
- Non-permanent employees in Personnel Area 21 (DPW)
- Non-permanent employees in Personnel Area 78 (PennDot)
- Intermittent Intake Interviewers (III) in Personnel Area 12 (L&I)
- Temporary Clerical Pool (Org 00813022) with the exception of college students

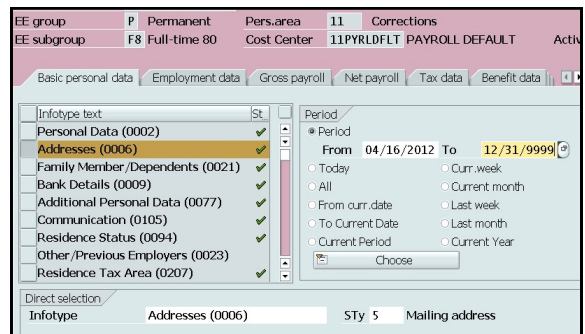
INFOTYPE 0006, Subtype 5

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 

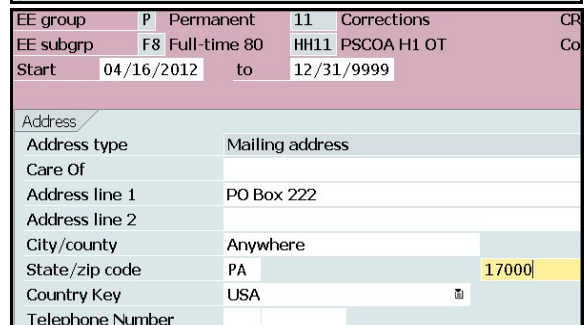


EE group	P	Permanent	Pers.area	11	Corrections
EE subgroup	F8	Full-time 80	Cost Center	11PYRLDFLT	PAYROLL DEFAULT
Basic personal data Employment data Gross payroll Net payroll Tax data Benefit data					
Infotype text	St				
Personal Data (0002)	✓				
Addresses (0006)	✓				
Family Member/Dependents (0021)	✓				
Bank Details (0009)	✓				
Additional Personal Data (0077)	✓				
Communication (0105)	✓				
Residence Status (0094)	✓				
Other/Previous Employers (0023)	✓				
Residence Tax Area (0207)	✓				
Direct selection					
Infotype	Addresses (0006)	STY 5	Mailing address		

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	CR
EE subgrp	F8	Full-time 80	HH11	PSCOA H1 OT	Co
Start	04/16/2012	to	12/31/9999		
Address					
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					

Re-executing action if INFOTYPE 0007 is not input during New Hire action

Note: Caution should be taken with re-executing an action and this should be avoided if possible.

If a work schedule is not input during a new hire action and you get to IT0008 it will not accept a pay because the work schedule was not input during the action here are instructions on how to correct.

This can be done using PA40. First they will have to create IT0007 using PA30 then re-execute the PA40 action. Here are the instructions:

Select the appropriate Personnel Number, select "New Hire" and the execute button. When the next screen appears, click on Execute Info Group at the top of the screen. You will receive a pop up menu with a message. Click on continue. This will take you back into the action. Use the small yellow arrow keys in the top left hand corner of the screen to move from screen to screen. The screens you have completed will be displayed and you may continue your action when you come to the screen where you were interrupted. Many times, some of the infotypes in the action will not be displayed when re-executing an action and you will need to access them via a PA30 action.

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 0027, Subtype 1

When creating a position in PBPP, please be sure to obtain BA 25 funding for the position. Once the position is filled, the employee will need to have an IT0027, Sty 01 record created.

INFOTYPE 0019

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

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**.

INFOTYPE 0235

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 Employee 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

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	04/30/2012	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
03	Employee Social Security Tax		01EMPLOYEE SOCIAL		Y
04	Employer Social Security Tax		01EMPLOYER SOCIAL		Y
05	Employee Medicare Tax		01EMPLOYEE MEDIC		Y
06	Employer Medicare Tax		01EMPLOYER MEDIC		Y
10	Employer Unemployment Tax		01EMPLOYER UNEM.		
55	Employee Railroad Rmt Tier1 Soc S		01RAILROAD RETIRE		

Create IT0235, **subtype PA**

Enter 'Y' in the:

- 20-Employee Unemployment Tax

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	04/30/2012	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
10	Employer Unemployment Tax		01EMPLOYER UNEM.		
11	Employer Debt Repayment Tax		01EMPLOYERS FUTA		
20	Employee Unemployment Tax		01EMPLOYEE UNEM.		Y
61	Employee Retirement Plan-S.S		01EMPLOYEE RETIRE		
62	Employee Retirement Plan-Med.		01EMPLOYEE RETIRE		
63	Employer Retirement Plan-S.S		01EMPLOYER RETIR.		


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

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	04/30/2012	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
84	Local Services Tax		01		Y

Note: for Resident Workers **ONLY**, the end date is of the LST/OPT exemption is 12/31/9999. 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

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

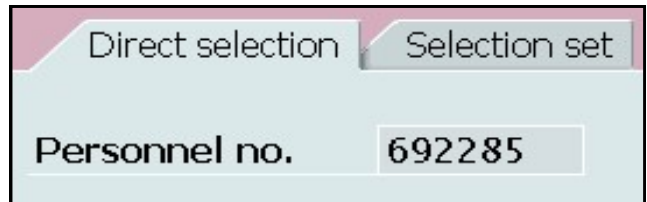
Note: Dept of Education employees, do not enroll; submit a [CM](#) ticket to Empl Svcs.

Note: If you changed the pay rate on the IT0008, you will need to wait until that record is unlocked in order to enroll in SERS.



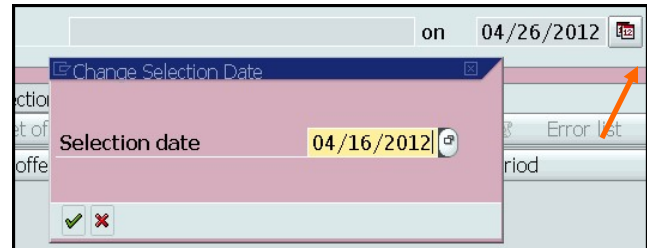
1 On the home screen of SAP, under the Benefits folder, double-click **HRBEN0001—Enrollment.**

2 Enter the employee number.



Click on the date change icon.

Change the date to the new hire effective date.



Click

3 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).

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

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

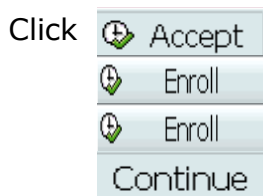
In this example, the employee has been hired into the H1 bargaining unit, and is therefore eligible for age 50/55 retirement (COV 1 CAT 1,6,8); double-click.

Plan	Status	Validity period
State Emp Ret		
CLS A3 COV 1 CAT 0		04/16/2012 -
CLS A3 COV 1 CAT 1,6,8	<input checked="" type="checkbox"/>	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 -

Things to Consider:

All Interns (except for those receiving college credit for working) who reach 750 hours worked should be enrolled in SERS.

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



Contribution regular

Pre-tax contribution Bi-weekly

Amount: 0.00000 USDN Pre-Tax Rollove

Percentage: **6.25**

Units: 0 X 0.00000 USDN

Post-tax contribution Bi-weekly

Amount: 0.00000 USDN Start Pst-Tax I

Percentage: 0.00

Units: 0 X 0.00000 USDN

Accept

Go back to the employee's record via PA20 and confirm that IT0167-0169 were successfully created.

References

[Benefits Alert 2012-03](#)

[Benefits Alert 2012-08](#)

[Benefits Alert 2015-03](#)

[Benefit Alert 2011-08](#)

[Personnel Administration Alert 2008-1](#)

[Personnel Administration Alert 2011-04](#)

[Personnel Administration Alert 2004-18](#)

[Personal Administration Alert 2015-08](#)

[Personnel Administration Alert 2012-11](#)

[Personnel Administration Alert 2012-12](#)

[Personnel Administration Alert 2013-06](#)

[Management Directive 530.11](#)

[Management Directive 540.7](#)