





## QRG – Personnel Actions (PA40)

HR Administrators utilize PA40 to process all department personnel actions. Some actions require a ZPAR, and while others generate workflow. Actions denoted with the  symbol generate workflow.

### Prepping

- Verify that approvals have been obtained (example: approved Salary Recommendation form, approved overload form, etc).
- Verify that you have all of the information that you will need to enter the personnel screens (employee name, date of birth, position number, etc).
- Review the position attributes, via PP01, to verify that the correct supervisor, employee group, personnel subarea, etc. are listed.
- -Utilize the personnel assignment details icon  in PA40 to review the employee's SAP history to determine which personnel action is appropriate
- Review the [Quick Reference Card](#) for the appropriate personnel action.

### Personnel Actions (Click any title to access the quick reference guide)

#### [Main Campus Create Assignment](#)

**This action should be used whenever an employee is entering into a position number for the first time.**

[New Hires](#) (individuals that have no SAP employee record)

[Re-Hires](#) (for individuals that have a SAP employee record that they have separated from and are now returning to UK in some capacity)

[Lateral \(aka transfer\)/Promotion/Temp to Reg](#) (when an employee is changing from one position number to another).

#### [Additional Assignments](#)

For employees that already have at least one active assignment, and are adding another.


Tip: please see [Reactivate Add Assignment](#) instructions, below, prior to entry to determine if it would be more appropriate.

Note: The employees name should be entered as it appears on their ID documents used to obtain the I9.

#### [Reactivate Add Assignment](#)



This action is to avoid creating an unnecessary additional personnel number for an employee. If an employee already has multiple personnel numbers, and at least one is inactive (ended, not separated), you can use this action.

**Note:** The “personnel assignment details” icon on  PA40 should be utilized to verify that the employee fits the criteria.



### Position Update

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**Use this action when the employee is remaining in the same position, but the actual position's attributes changed.**

**Re-evaluation** – For regular staff positions that have been re-evaluated through HR

**Title Change** – When only the title of the position changed

**Change in wkly hrs** –FTE changes that involve a change in personnel sub-area.

**Change in Title Series or Rank**- Used for faculty series/rank changes

**Summer Hours** - Used to place someone on a reduced summer fte

**Return from Summer Hours**- Used when an employee is returning from summer reduced fte

**Inter Department Transfer**- When the position (not just the employee) is moving from one organizational unit to another

Note: Occasionally, you may find the need to change an unpaid visiting scholar or visiting student, to a paid position, but you will be using the same position number. You would need to do a “**Position Update**” action and the reason would be “Payroll Area Transfer”. (**DO NOT** process a “Change in Base Pay” action).

### Change in Status

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**This action is used when an employee is staying in the same position but the personnel subarea has to be adjusted.**

**Phased Retirement** – Used for employees entering phased retirement

(For Phased Retirement assignments, the position number does not change – but the position attributes have to be updated before entering the action. Email the position number and information to the Business Center)

### FTE Change

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**This action can be used when an employee is changing FTE within the same Personnel Subarea only.**

**FTE Change** (if the personnel subarea is changing, then the Position Update action should be used instead – see above)

### Separation


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## QRG – Personnel Actions (PA40)

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This action should be used when an employee is leaving the University (not retiring). In this case the employee would have no other active assignment, because they are leaving UK, not just your department. The “personnel assignment details” icon on  PA40 should be utilized to verify that the employee is not continuing to be active in any other departments at UK.


**Note:** A zpar is not required. [Separation Sheet](#) is the document that is required. Whenever applicable, a copy of the resignation letter should be attached to the Separation Sheet, and an [Exit Checklist](#) should be completed/maintained in the department personnel file.

### End of Additional Assignment

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This action would be used when the employee is ending one assignment, but will be remaining active in other assignment(s) at UK.

The “personnel assignment details” icon on  PA40 should be utilized to verify that the employee will continue to be active in other department(s) at UK.

### LOA with Pay

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This action should be used when an employee is going to be on a leave of absence from the University, but will remain in a paid status.

### LOA without Pay

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This action should be used when an employee will be on a leave of absence without pay.

### Return from Leave with Pay

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Use this action when an employee who has been on a leave of absence with pay returns to work.

### Return from Leave without Pay

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Use this action when an employee who has been on a leave of absence without pay returns to work.

### Change in Base Pay

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This action is to change an employee’s base pay.



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- Equity Adjustment, Market Adjustment (mostly used by the Hospital), Mid-Year Adjustment, Sal-Pro Override, Fiscal Year Increase, Acting, End Acting, To KY Minimum Wage

**Note:** All approval documents must be attached to the workflow.

### Retirement



**This action is used when an employee is retiring from UK.**

The CAFE Business Center enters the action for Civil Service Retirees (EE group 14, 15, 16, & 29)

The Retirement (Benefits) Office enters all others. The department enters leave payouts.

**Note:** Route all Separation Sheets through the CAFE Business Office, and write “Civil Service” in the comments section if applicable.

### Retiree Rehire

**This action is used when a retired employee returns to work in some capacity for the University.**

**Note:** This action should be completed by working with the CAFE Business Center, HR Team.

**Note:** Review the position attributes in PP01. The position should have a working retiring EE group: F, G, K, or L.

**Note:** If it is not a Board of Trustees approved post retirement appointment, then it should be a STEPS assignment.

### Retiree Set back to Inactive



This action is used when a retiree has returned to work in some capacity, and is now leaving that assignment. The Retirement Office should be notified, so that they can complete this action. If it is a Civil Service retiree, please notify the Ag Business Center.

### Follow Up

- Print the ZPAR (zhr\_par)/obtain approval signatures – or – process the workflow (SBWP)/obtain approvals.
- The ZPAR or workflow should be sent through the CAFE Business Center **prior** to the designated deadline (the CAFE deadline is 10:00 am on the day of the Compensation deadline).



SAP Biweekly Payroll Schedule for Jan - June 2018						
<b>Workflow actions due to the college by 10:00 am</b>		<b>Time Load, Time Transfer, and Time Evaluation MUST be run EACH day</b>				
Documents <b>MUST</b> be received in Compensation by 5:00 PM	Data and Time Input <b>MUST</b> be entered by Thursday 5:00 pm Payroll Run (Prelim)	Corrections and Other Data <b>MUST</b> be entered by Sunday 5:00 pm Payroll Correction Run (Trial)	Departments have until Monday 5:00 pm for biweekly payroll corrections Payroll Correction Final Run	Payroll Period Dates		
Bi-Weekly Date	Bi-Weekly Date	Bi-Weekly Date	Bi-Weekly Date	Begin	End	Date Paid
01/03/2018	01/04/2018	01/07/2018	01/08/2018	12/24	01/06	01/12
01/17/2018	01/18/2018	01/21/2018	01/22/2018	01/07	01/20	01/26
01/31/2018	02/01/2018	02/04/2018	02/05/2018	01/21	02/03	02/09

- Review SAP to make sure that all approval levels are obtained prior to the payroll deadline (screen to review, 9022, 9012, 8 and 3),
- After the payroll preliminary run, and before the payroll deadline review PC00\_M10\_CEDT to ensure that all payments are correct.
- Review the BW Labor Distribution Reports (usually available 3 days after the payroll final) to ensure the funding is accurate.

### Resources

- [HR Administrator Resources](#)
- [Employee Resources](#)
- [Supervisor Resources](#)
- [Post Doc Scholar Resources](#)