

PA40 – Request a Personnel Action

Process: Use transaction PA40 to request a personnel action for an employee in SAP. The creator should enter the personnel action via transaction PA40. The creator will then review their work and add comments/attachments as needed. The status of the approval workflow can be monitored from transaction PA40.

****Prior to processing this transaction, ensure all necessary authorizations/approvals for this personnel action for the employee have been obtained.**

Role: Authorized Users

Frequency: When needed

Beginning

Enter the transaction code

PA40

Personnel Actions

Person ID

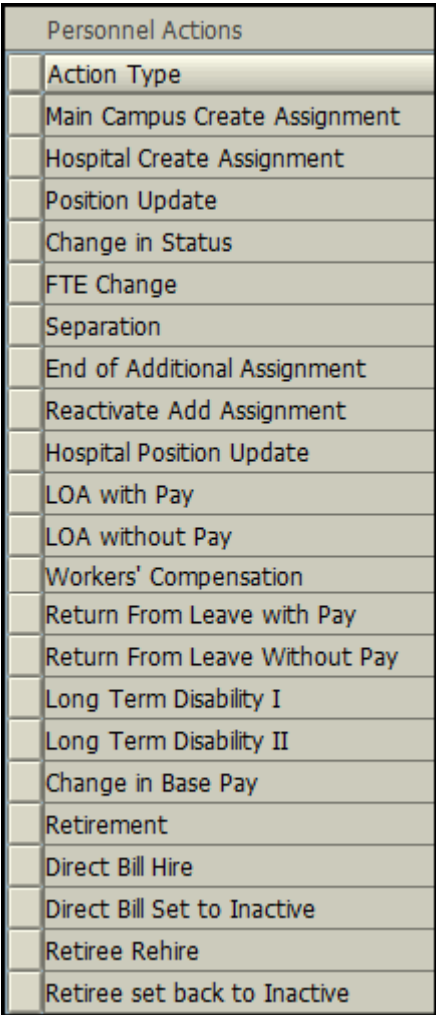
Enter the employee's Person ID or use the **Possible Entries** icon  to select

Press **Enter** to populate the employee's information at the top of the screen

Start

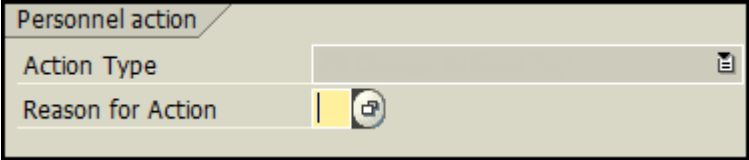
Enter the date in which the change will take effect

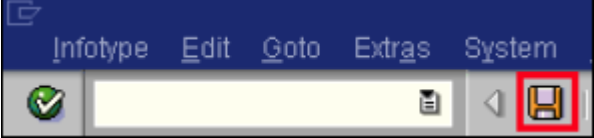
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<p>Click on the Select button to the left of the Action Type to be updated</p>	 <p>A dropdown menu titled "Personnel Actions" with the following items: Action Type, Main Campus Create Assignment, Hospital Create Assignment, Position Update, Change in Status, FTE Change, Separation, End of Additional Assignment, Reactivate Add Assignment, Hospital Position Update, LOA with Pay, LOA without Pay, Workers' Compensation, Return From Leave with Pay, Return From Leave Without Pay, Long Term Disability I, Long Term Disability II, Change in Base Pay, Retirement, Direct Bill Hire, Direct Bill Set to Inactive, Retiree Rehire, Retiree set back to Inactive.</p>
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<p>Click on the Execute icon</p>	 <p>A square icon with a green checkmark and a downward-pointing arrow.</p>
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Copy Actions (0000)

<p>Click on the Possible Entries icon in the Reason for Action field, then double-click on the appropriate reason for the change</p>	 <p>A screenshot of a form field labeled "Reason for Action". It contains a dropdown menu with a "Possible Entries" icon (a document with a magnifying glass) on the right side.</p>
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<p>Complete the change and click the Save icon</p>	 <p>A screenshot of a menu bar with options: Infotype, Edit, Goto, Extras, System. Below the menu bar is a toolbar with a green checkmark icon, a document icon, a left arrow icon, and a red square highlighting a floppy disk icon (the Save icon).</p>
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Copy Basic Pay (0008)

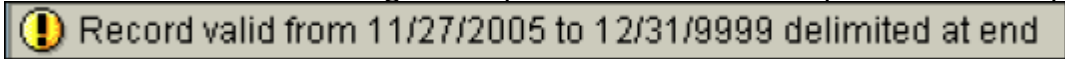
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Enter the new pay rate for the employee in the **Amount** field

Wa...	Wage Type Long Text	O. Amount	Curr...
1905	Hourly Rate	17.00	JSD
			ISD

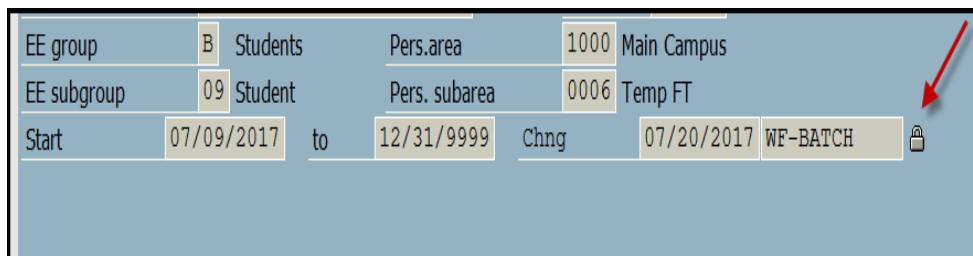
Press **Enter**, which will populate the **Annual Salary** field

Read the delimit message and press **Enter** to accept – For example:



Click the **Save** icon and exit the transaction

Note: The record will remain locked, until **all** required approval steps are completed. The system will automatically delete the action if a workflow step has not been acted on for 7 calendar days. The approvers listed in the FI approval tables will receive email notifications when a workflow item arrives in their inbox.


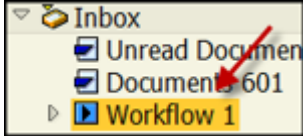



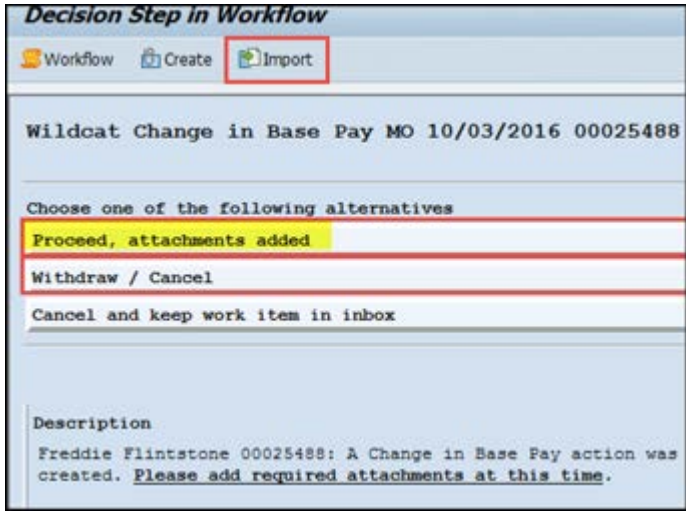
A workflow will be started when actions in the table below are changed.

Action Name	Action Type
Reactivate Add Assignment	V2
Position Update	XG
Hospital Position Update	Z4
Worker's Compensation	Z5
Main Campus Create Assignment	ZA
Hospital Create Assignment	ZE
Position Change	ZF
LOA with Pay	ZK
LOA without Pay	ZL
Return From Leave with Pay	ZM
Return From Leave Without Pay	ZN
Change in Base Pay	ZR
Additional Assignment	ZT
Change in Status	ZV
FTE Change	ZW

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Review, Add Attachments, & Send for Approval Option 1: SAP

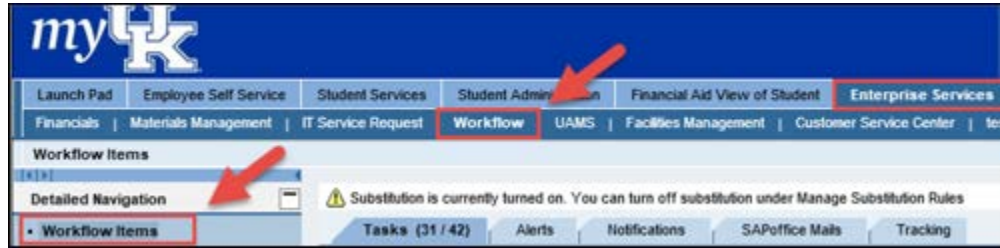
<p>Access the SAP Business Workplace</p>	<p>Enter transaction SBWP OR Click the SAP Business Workplace icon  in the SAP GUI SAP Easy Access screen</p>
<p>Open the workflow</p>	
<p>Add attachments</p>	<p>Click the  Import button to browse and open files to attach</p>
<p>Send for Approval</p>	<p>Click the 'Proceed, attachments added' button A text box will open to allow for comments to be added</p>



Review, Add Attachments, & Send for Approval Option 2: myUK Portal

<p>Open your workflow tasks</p>	<p>Click on the Enterprise Services tab Click on the Workflow subtab Click on the Workflow Items menu option</p>
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Open the workflow

Add attachments

Click the **Manage Attachments** button
Browse and upload files

Enter comments

Send for approval

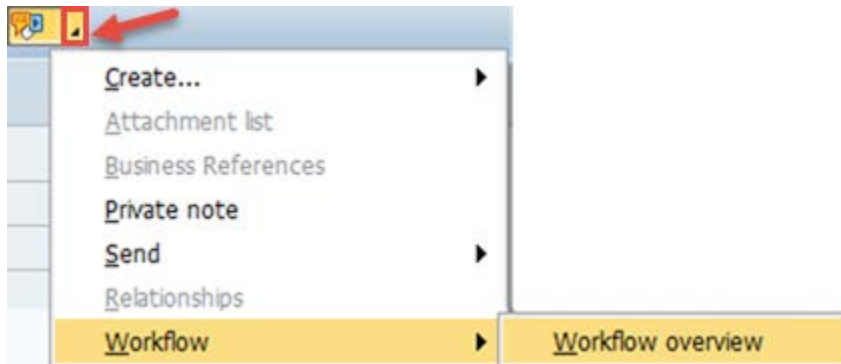
Click the 'Proceed, attachments added' button

Check the Status of a Workflow

Look up an employee

Transactions PA20, PA30, or PA40

Click 'Workflow' and 'Workflow overview' in the 'Services for Object' drop-down menu



Select the workflow to display details including statuses, dates, times, and approvers for each step

Click the **Information...** link in the **Agent** column to find out who the current approver is

The most recent details are at the bottom of the list of steps