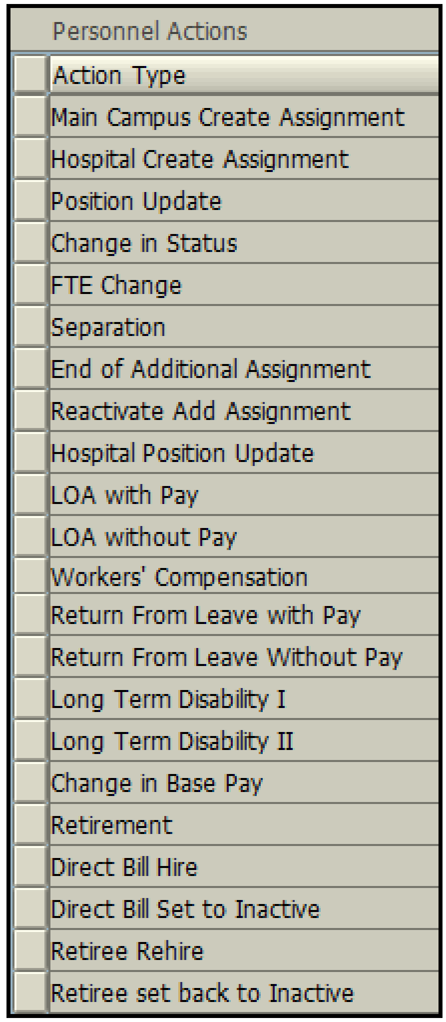
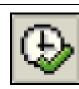
PA40 – Request a Personnel Action

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

Click on the **Select** button to the left of the Action Type to be updated	
Click on the Execute icon	
Copy Actions (0000)	
Click on the **Possible Entries** icon in the **Reason for Action** field, then double-click on the appropriate reason for the change	
Complete the change and click the **Save** icon	
Copy Basic Pay (0008)	

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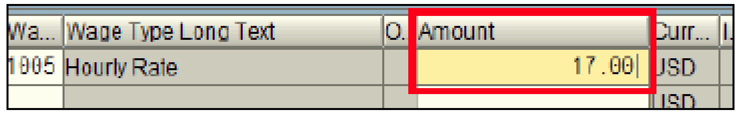
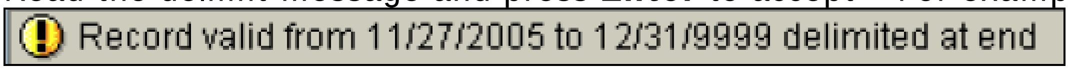
Enter the new pay rate for the employee in the **Amount** field



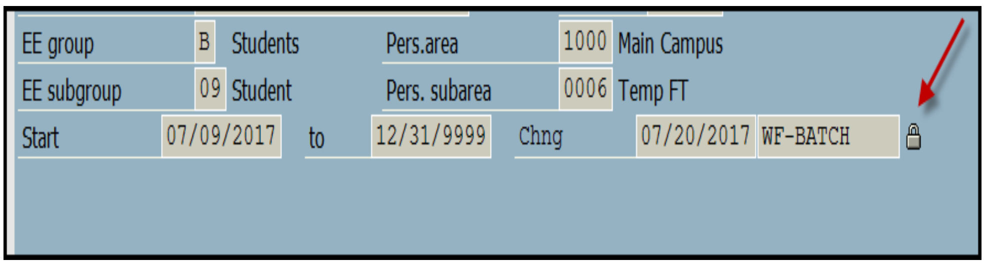
Press **Enter**, which will populate the **Annual Salary** field

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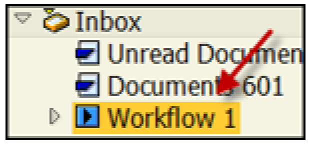
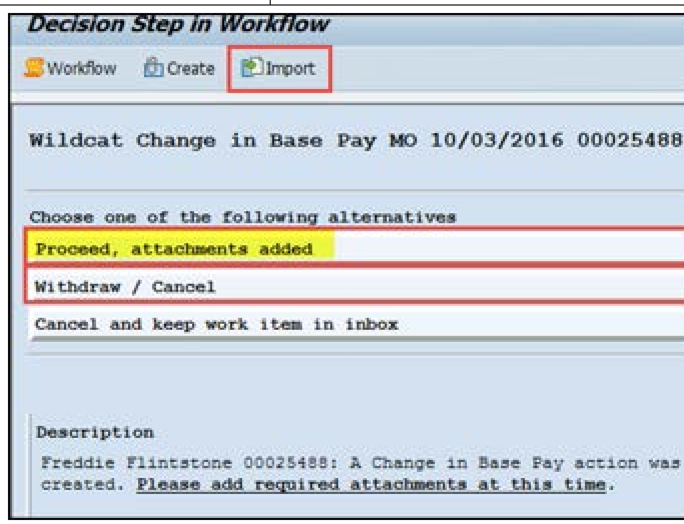
Review, Add Attachments, & Send for Approval
Option 1: SAP

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



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

Open your workflow tasks	Click on the Enterprise Services tab Click on the Workflow subtab Click on the Workflow Items menu option

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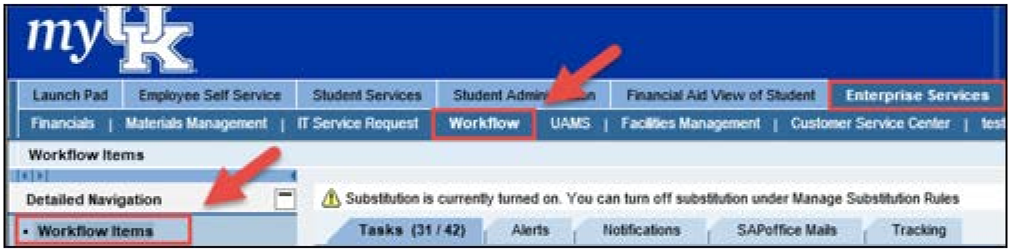
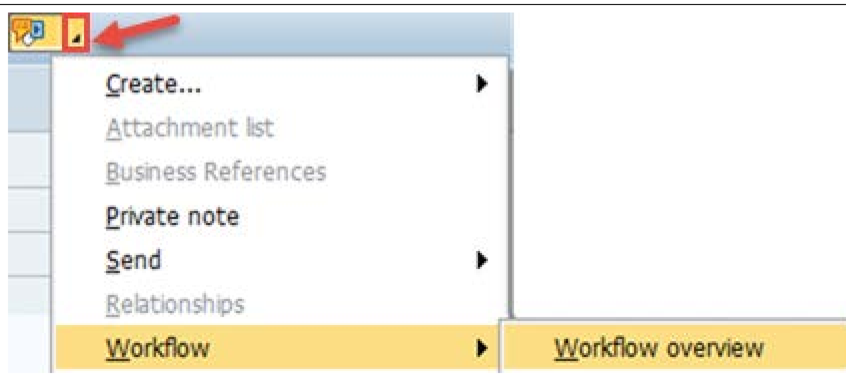


Open the workflow	
Add attachments	Click the Manage Attachments button Browse and upload files
Enter comments	
Send for approval	Click the 'Proceed, attachments added' button
Check the Status of a Workflow	
Look up an employee	Transactions PA20, PA30, or PA40
Click 'Workflow' and 'Workflow overview' 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	