Enter Personnel Action - New Hire (PA40)

Purpose

Use this procedure to enter data for a new employee.

Trigger

Perform this procedure when a new employee is hired.

Prerequisites

Start Date

Menu Path

Use the following menu path to begin this transaction:

N/A

Transaction Code

PA40

Helpful Hints

- R/O/C column in tables represents Required, Optional, or Conditional entry
- The Minimum and Maximum grade level amounts represent range for this position's pay (viewed using **Level** matchcode in the Basic Pay (0008) infotype)
- During the New Hire action, populate infotype 0009 Bank Details by either saving the default information presented in the infotype, this allows the employee to receive a check, or enter the direct deposit information if the employee has provided it to you. Forward the forms to Central Payroll for verification. For all future changes to bank details, send completed direct deposit forms provided by employees to Central Payroll at 106/1200/Central Payroll who make the appropriate changes
- During the New Hire action, populate infotype 210 FED and 210 OR with information provided by the employee's W-4 forms, enter information in the "filing status", "allowances" and "additional withholding fields". Forward these forms to Central Payroll for verification. For all future changes to withholdings, send completed W-4 forms provided by employees to Central Payroll at 106/1200/Central Payroll who make the appropriate changes
- For Police and Fire Bureau employees, please complete the Contract Field to indicate the taxability for employees in info type 0001 Organizational Assignment.
    - U-2 = The employee was sworn on or before 3/31/1986 then they are not taxable for Social Security or Medicare because FPD&R pays their retirement and any disability claims. They are also not subject to the Workers Comp Benefit fund which is a tax

Enter Personnel Action - New Hire (PA40)

- o U-3 = The employee was sworn on or after 4/1/1986 they are not taxable for Social Security but are taxable for Medicare. They are also a part of PERS and Risk Workers Compensation (City). They are subject to the Workers Comp Benefit fund which is a tax based on productive hours. There is currently only one employee in this category. This category receives no type of benefits from FPD&R. Fire and Police have more employees that could fall into this category if they choose to put them here
- o U-4 =The employee was sworn on or after 4/1/1986 they are not taxable for Social Security but are taxable for Medicare, yet they are also a part of PERS and FPD&R for disability claims only. They are not subject to the Workers Comp Benefit fund which is a tax based on productive hours

Enter Personnel Action - New Hire (PA40)

Procedure

1. Start the transaction using the menu path or transaction code. The *Personnel Actions* screen displays.

Personnel Actions

2. As required, complete/review the following fields:

Field	R/O/C	Description
From	R	Beginning value to be entered when specifying a range. **Example:** 072408
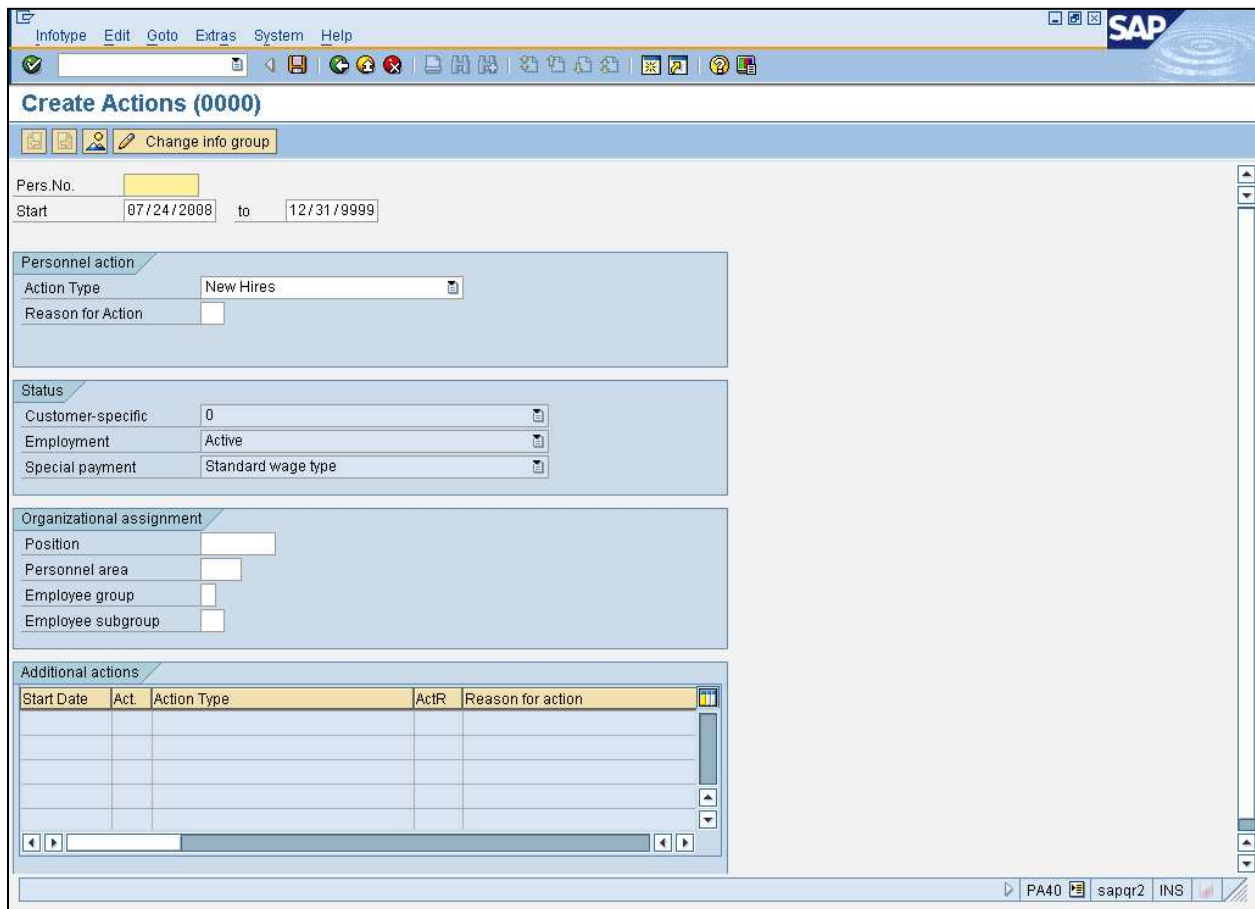
3. Select **New Hires** record indicator ☐ .

Enter Personnel Action - New Hire (PA40)

4. Click **Execute** button 🕐 . The *Create Actions (0000)* screen displays.

Create Actions (0000)

5. Click **Reason for Action** field ▢ .

6. Click **Reason for Action** matchcode 🔲 . The *Reason for Action (XXXX)* dialog box displays.

Enter Personnel Action - New Hire (PA40)

Reason for Action (XXXX)   (YYYY) Entries found

Reason for Action (1) 3 Entries found	🔲 ⊠

Restrictions

▽

✓ ⊠ 🔍 📇 ⊞ 🖨 | 🏆

Action Type: U0
Name of action type: New Hires

Ac...	Name of reason for action
01	New Employee
02	Prev Emp-Not Conv-Reinstate
03	Previous Employee-Not Conv

3 Entries found

7.   Select **01 New Employee** list item | 01 | New Employee | .

8.   Click **Enter (continue)** ✓ .

Enter Personnel Action - New Hire (PA40)

Create Actions (0000)

9. As required, complete/review the following fields:

Field	R/O/C	Description
Position	R	Organizational objects held by employees and assigned to organizational units which may inherit characteristics from its organizational unit or the assigned job. **Example:** 40000008

10. Click **Enter** button . The *Information* screen displays.

Enter Personnel Action - New Hire (PA40)

Information
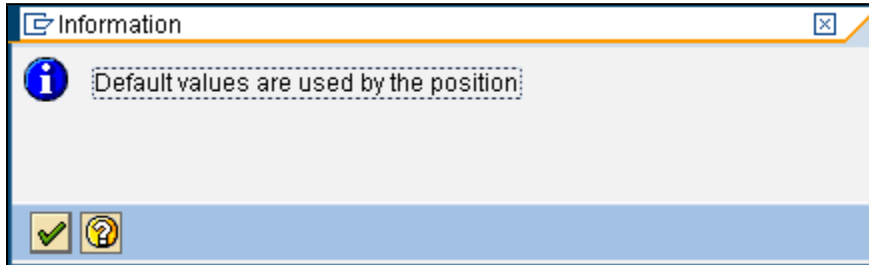
11. Click **Enter (continue)** button .

Create Actions (0000)
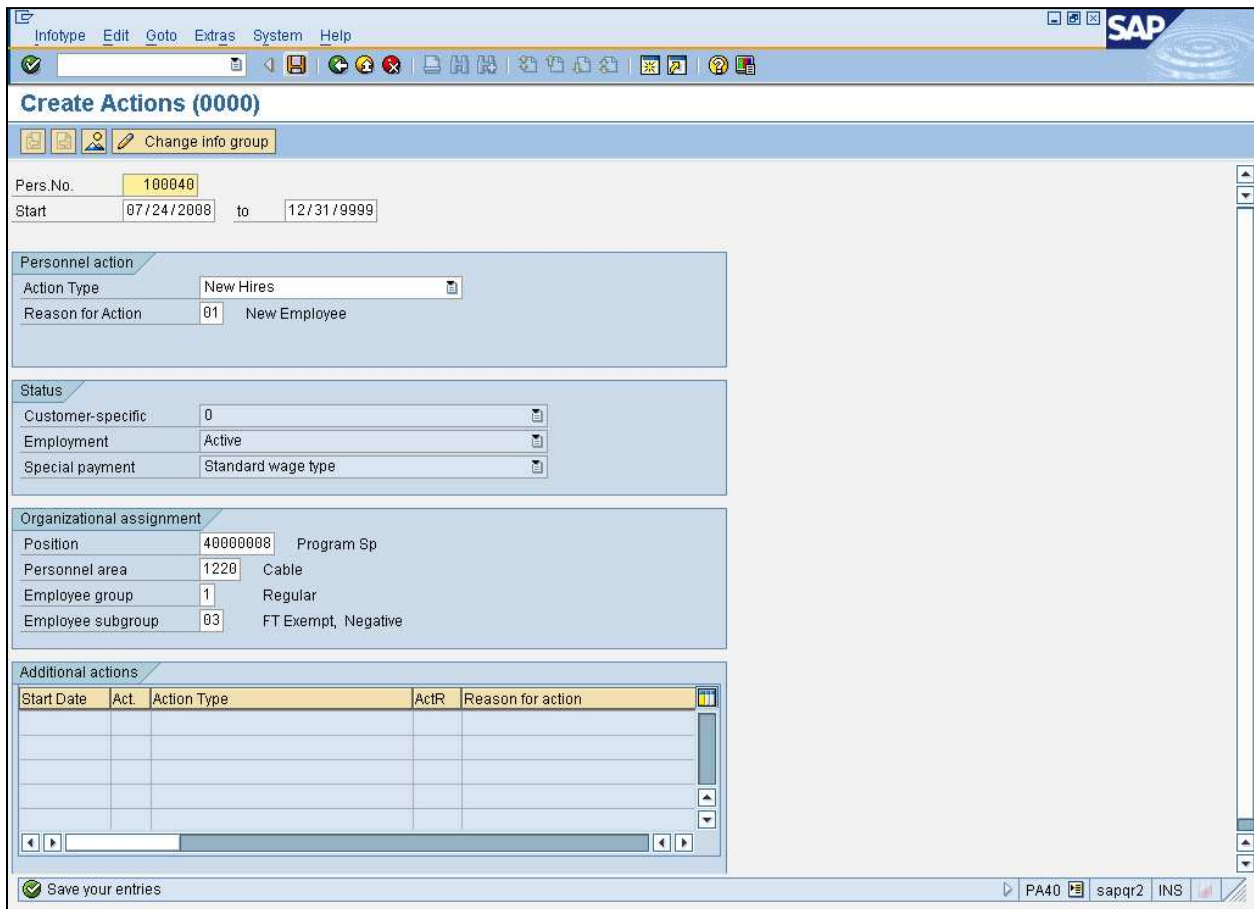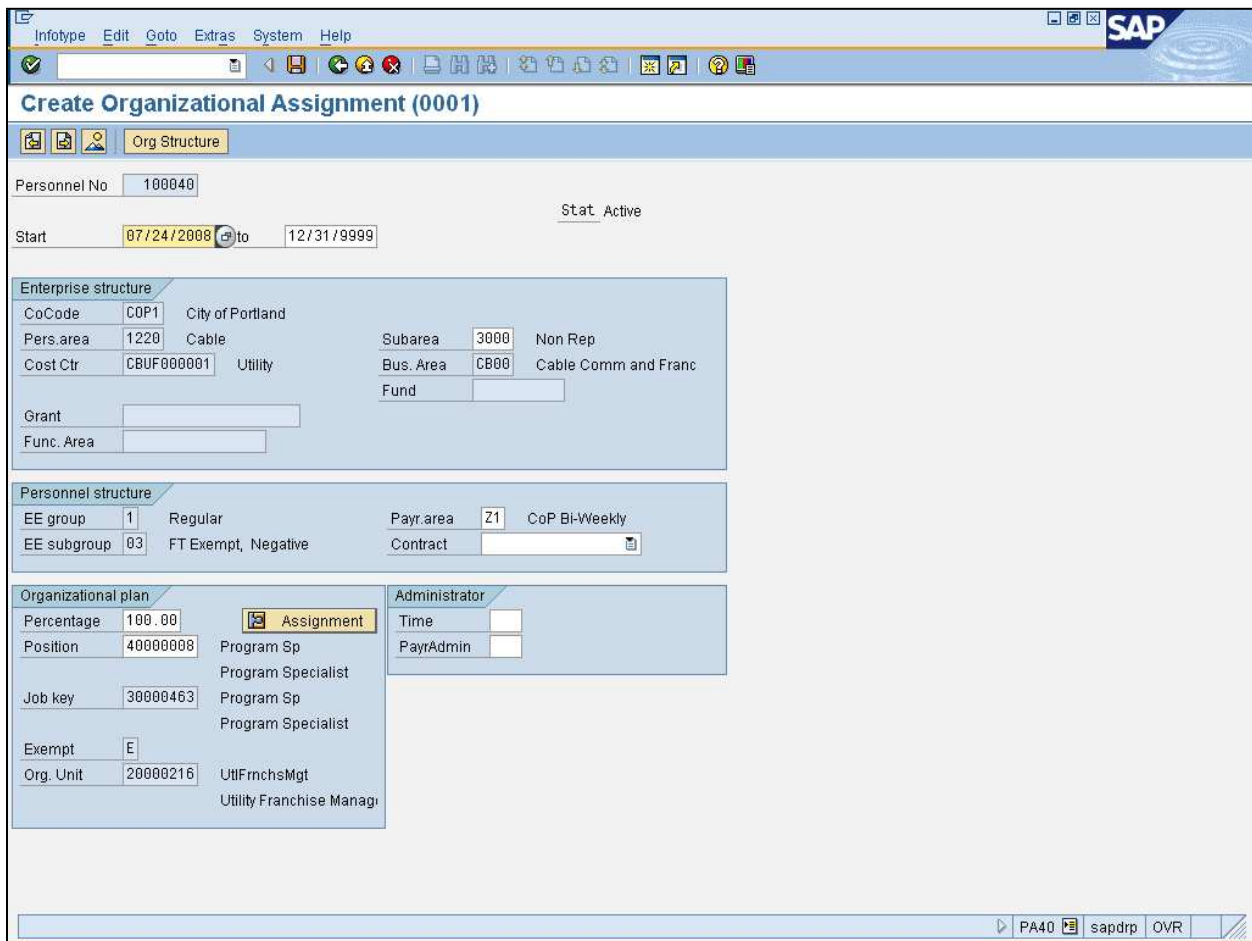
Enter Personnel Action - New Hire (PA40)

12. Click **Save** button 🖫 . The *Create Organizational Assignments (0001)* screen displays.

ⓘ The system returns the message, *"Save your entries"*.

Create Organizational Assignment (0001)

13. Click **Time** field ⬜ .

14. Click **Time** matchcode 🔄 . The *Administrator for Time Recording (XXXX)* dialog box displays.

Enter Personnel Action - New Hire (PA40)

Administrator for Time Recording (XXXX)   YYYY Entries found

15. Select **O01 Justice, Carol S** list item O01 Justice, Carol S .

Only Timekeepers in your bureau are listed.

16. Click **Enter (continue)** button .

Enter Personnel Action - New Hire (PA40)

Create Organizational Assignment (0001)

17. Click **Enter** button . The *Organizational Assignment (0001)* screen updates.

> The system returns the message, *"Record created"*.

> For Police and Fire Bureau employees, please complete the Contract Field to indicate the taxability for employees.

18. Click **Save** button . The *Delimit Vacancy* dialog box displays.

> The system returns the message, *"Save your entries"*.

Enter Personnel Action - New Hire (PA40)

Delimit Vacancy

19. As required, complete/review the following fields:

Field	R/O/C	Description
Delimit on	R	End date. **Example:** 072408

20. Click **Yes** button Yes .

Enter Personnel Action - New Hire (PA40)

Create Personal Data

21. Click **Last name** field [checkbox field] .

The system returns the message, *"Record created"*.

22. As required, complete/review the following fields:

Field	R/O/C	Description
Last name	R	Surname; the name used to identify the individual. **Example:** Vandivier

Enter Personnel Action - New Hire (PA40)

Field	R/O/C	Description
First name	R	The name that precedes the surname; aides in identifying the individual. **Example:** Sharon
Middle name	R	Middle name of employee. **Example:** P
SSN	R	A number given to an individual by the U.S. government program financed by employer and employee payments that provide retirement insurance, disability benefits, and unemployment compensation. **Example:** 999999940
Date of Birth	R	Year, month and day of birth. **Example:** 10/01/1955

23.   Click **Enter** button ✅ . The *Create Personal Data* screen updates.

24.   Click **Save** button 💾 . The *Create Communication(0105)* screen displays.

The system returns the message, *"Save your entries".*

Enter Personnel Action - New Hire (PA40)

Create Communication (0105)

25. Click **Enter** button ⊘ .

The system returns the message,*"Record created".*

26. Click **Save** button 💾 . The *Create Addresses (0006)* screen displays.

The system returns the message, *"Save your entries".*

Enter Personnel Action - New Hire (PA40)

Create Addresses (0006)

27. Click **Address line 1** field

☑ _____ .

The system returns the message, *"Record created".*

28. As required, complete/review the following fields:

Field	R/O/C	Description
Address line 1	R	Street address. **Example:** 990 Strother Street

Enter Personnel Action - New Hire (PA40)

Field	R/O/C	Description
City	R	A large and densely populated urban area; may include several independent administrative districts. **Example:** Portland
State	R	State (abbreviated). **Example:** OR
zip code	R	Zip code as part of address. **Example:** 97204

29. Click **Enter** button . The *Create Addresses (0006)* screen updates.

30. Click **Save** button . The *Create Residence Tax Area (0207)* screen updates.

The system returns the message, *"Save your entries".*

Enter Personnel Action - New Hire (PA40)

Create Residence Tax Area (0207)

31. Click **Enter** button 🗹 .

The system returns the message, *"Record created"*.

32. Click **Save** button 🖬 . The *Create Work Tax Area (0208)* screen displays.

The system returns the message,*"Save your entries"*.

Enter Personnel Action - New Hire (PA40)

Create Work Tax Area (0208)

33. Click **Save** button .

> The system returns the message, *"Record created".*

34. Click **Save** button . The *Create Unemployment State (0209)* screen displays.

> The system returns the message, *"Save your entries".*

Enter Personnel Action - New Hire (PA40)

Create Unemployment State (0209)

```
Infotype  Edit  Goto  Extras  System  Help

Create Unemployment State (0209)

Personnel No    100040        Name         Sharon Vandivier
EE group       1   Regular    Pers.area    1220 Cable
EE subgroup    03  FT Exempt, Negative  Pers. subarea   3000 Non Rep    Stat Active  Time 001
Start          07/24/2008  to    12/31/9999

Unemployment data
Tax authority      OR      Oregon
Worksite

Record created                                          PA40   sapqr2  INS
```

35. Click **Enter** button   .

   The system returns the message, *"Record created".*

36. Click **Save** button   . The *Create Working Info W4/W5US (0210)* screen displays.

   The system returns the message, *"Save your entries".*

Enter Personnel Action - New Hire (PA40)

Create Withholding Info W4/W5 US (0210)

37. Click **Filing Status** field ☑ .

The system returns the message, *"Record created".*

Populate infotype 210 FED and 210 OR with information on employee's W-4 forms, enter information in the **Filing status, Allowances** and **Additional withholding** fields. Forward these forms to Central Payroll for verification.

38. Click **Filing Status** matchcode . The *Filing status (XXXX)* screen displays.

Enter Personnel Action - New Hire (PA40)

Filing status (XXXX)   YYYY Entries found

F	Long Text	Start Date	End Date
01	Single	01/01/1980	12/31/9999
02	Married	01/01/1980	12/31/9999
03	Married claiming self plus dependents or	01/01/1980	12/31/9999
04	Married, both spouses working	01/01/1980	12/31/9999
05	Married, one spouse working	01/01/1980	12/31/9999
06	Head of household or family	01/01/1980	12/31/9999

Filing status (1)   6 Entries found

Restrictions

Tax Authority: FED

6 Entries found

Enter Personnel Action - New Hire (PA40)

39. Double-click **01 Single** list item `01 Single` .

Create Withholding Info W4/W5 US (0210)

40. As required, complete/review the following fields:

Field	R/O/C	Description
Allowances	R	Number of exemptions claimed by the employee. **Example:** 1

41. Click **Enter** button .

42. Click **Save** button . The screen updates.

Enter Personnel Action - New Hire (PA40)

> The system returns the message, *"Save your entries".*

43. Click **Filing Status** field ☑ .

> The system returns the message, *"Record created".*

44. Click **Filing Status** matchcode ⊡ . The *Filing Status (XXXX)* dialog box displays.

Enter Personnel Action - New Hire (PA40)

Filing status (XXXX)   YYYY Entries found

F	Long Text	Start Date	End Date
01	Single	01/01/1980	12/31/9999
02	Married	01/01/1980	12/31/9999
03	Married claiming self plus dependents or	01/01/1980	12/31/9999
04	Married, both spouses working	01/01/1980	12/31/9999
05	Married, one spouse working	01/01/1980	12/31/9999
06	Head of household or family	01/01/1980	12/31/9999

Filing status (1)   6 Entries found

Restrictions

Tax Authority: OR

6 Entries found

Enter Personnel Action - New Hire (PA40)

45. Double-click **01 Single** list item `01 Single` .

Create Withholding Info W4/W5 US (0210)

46. As required, complete/review the following fields:

Field	R/O/C	Description
Allowances	R	Number of exemptions claimed by the employee. **Example:** 1

47. Click **Enter** button .

48. Click **Save** button . The *Create Planned Working Time (0007)* screen displays.

Enter Personnel Action - New Hire (PA40)

The system returns the message, *"Save your entries".*

Create Planned Working Time (0007)

49. Click **Work schedule rule** field 80D08 .

The system returns the message, *"Record created".*

50. Click **Work schedule rule** matchcode . The *Restrict Value Range (XXXX)* dialog box displays.

Enter Personnel Action - New Hire (PA40)

Restrict Value Range (XXXX)   YYYY Entries found

Restrict Value Range (1) 51 Entries found ⊠

Restrictions

∇

ES grouping: 2
Holiday Calendar ID: ZP
PS grouping: 10

WS rule	Work schedule rule text	PWS	Start Date	End Date
080G0_01	MF 0600-1430	40G0	01/01/2007	12/31/9999
080G6_01	MF 0630-15:00	40G1	01/01/2007	12/31/9999
080H0_00	MF 0700-1530	40H0	01/01/2007	12/31/9999
080H0_01	MF 0700-1600	40H1	01/01/2007	12/31/9999
080H6_00	MF 0730-1600	40H2	01/01/2007	12/31/9999
080H6_01	MF 0730-1630	40H3	01/01/2007	12/31/9999
080I0_00	MF 0800-1630	40I0	01/01/2007	12/31/9999
080I0_01	MF 0800-1700	40I1	01/01/2007	12/31/9999
080I0_02	MF 0800-1600	40I4	01/01/2007	12/31/9999
080I6_01	MF 0830-1700	40I2	01/01/2007	12/31/9999
080I6_02	MF 0830-1730	40I5	01/01/2007	12/31/9999
080J0_00	MF 0900-1700	40J1	01/01/2007	12/31/9999
080J0_01	MF 0900-1730	40J3	01/01/2007	12/31/9999
080J0_02	MF 0900-1800	40J0	01/01/2007	12/31/9999
080J6_00	MF 0930-1800	40J2	01/01/2007	12/31/9999
540I0_0A	MF 0800-1700, SU-U OFF	40I7	01/01/2007	12/31/9999
540I0_0B	SU-U OFF, M-F 0800-1700	40I7	01/01/2007	12/31/9999
872FA_00	MH 0550-1520	36F0	01/01/2007	12/31/9999
872I0_00	MH 0800-1730	36I0	01/01/2007	12/31/9999
880H0_00	MH 0700-1730	40HD	01/01/2007	12/31/9999
880H0_09	TF 0700-1730	40H5	01/01/2007	12/31/9999
880I0_01	MH 0800-1830	40I6	01/01/2007	12/31/9999
880N0_00	UW 1300 -2300	40N0	01/01/2007	12/31/9999
880X0_00	UW 2300 -3300	40X0	01/01/2007	12/31/9999
980G0_0A	MH 0600-1530 F0600-1430,O	44G1	01/01/2007	12/31/9999
980G0_0B	MH 0600-1530 FO,0600-1530	44G1	01/01/2007	12/31/9999
980G6_0A	MH 0630-1600 F0630-1500,O	44G0	01/01/2007	12/31/9999

Enter Personnel Action - New Hire (PA40)

51. Double-click **080G0_01 MF 0600-1430** list item 080G0_01 MF 0600-1430 .

Create Planned Working Time (0007)

52. Click **Enter** button .

53. Click **Save** button . The *Create Basic Pay (0008)* screen displays.

The system returns the message, *"Save your entries".*

Enter Personnel Action - New Hire (PA40)

Create Basic Pay (0008)

54. Click **Reason** field ☑ .

The system returns the message,*"Record created"*.

55. Click **Reason** matchcode 🔲 . The *Reason for Changing Master Data (XXXX)* screen displays.

Enter Personnel Action - New Hire (PA40)

Reason for Changing Master Data (XXXX)   YYYY Entries found

56.   Double-click **02 New Hire/Rehire** list item   `02   New Hire/Rehire`   .

Enter Personnel Action - New Hire (PA40)

Create Basic Pay (0008)

57. Click **Amount** field [   ] .

The Minimum and Maximum grade level amounts represent range for this position's pay (viewed using **Level** matchcode).

Enter Personnel Action - New Hire (PA40)

Change Basic Pay (0008)

58. As required, complete/review the following fields:

Field	R/O/C	Description
Amount	R	Figure within the pricing procedure that determines how the system calculates a condition value. **Example:** 2500.00

59. Click **Enter** button . The *Change Basic Pay (0008)* screen updates.
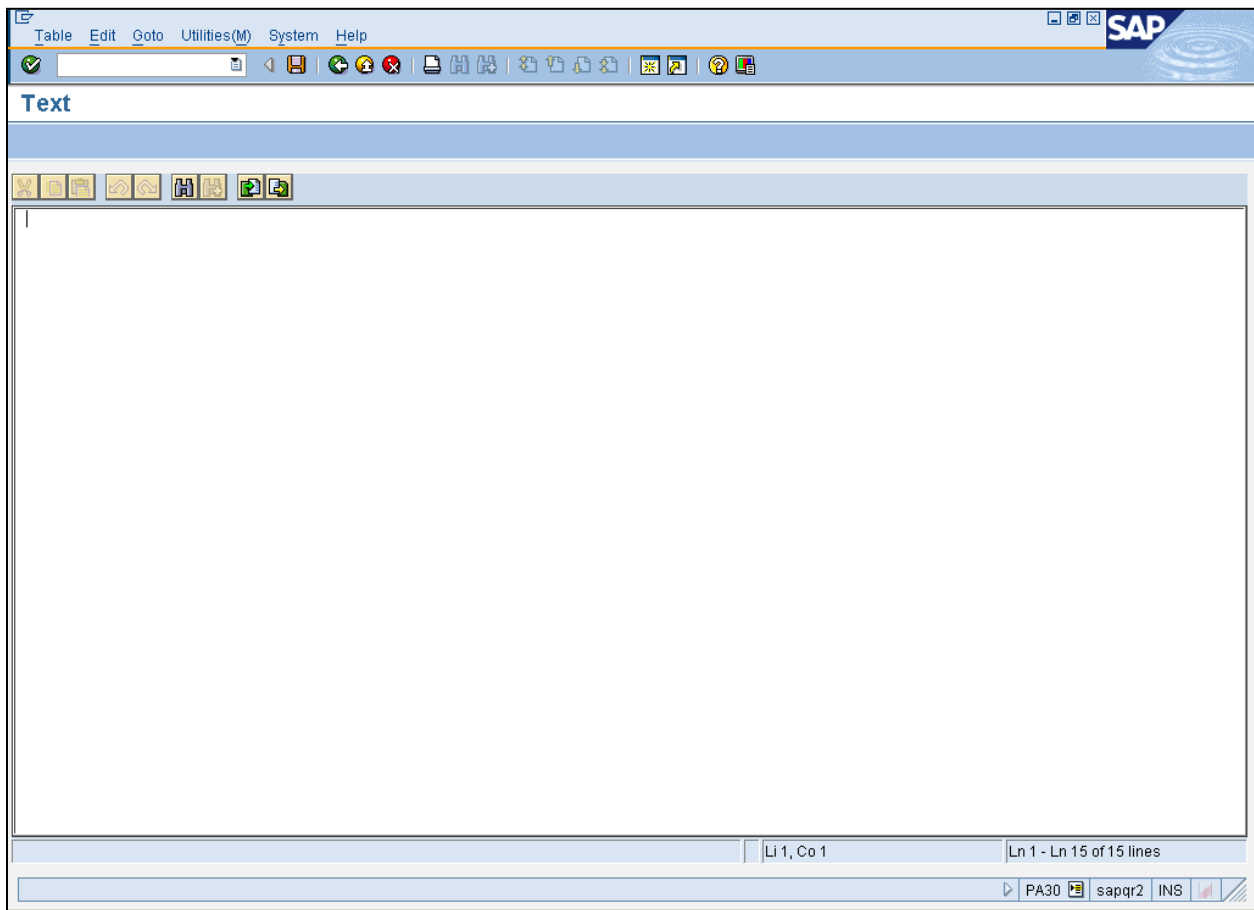
60. Click **Edit** Edit from the main menu.

Enter Personnel Action - New Hire (PA40)

> The system returns the message,*"Save your entries".*

61. Select **Maintain text F9** menu item | Maintain text   F9 | .

Text

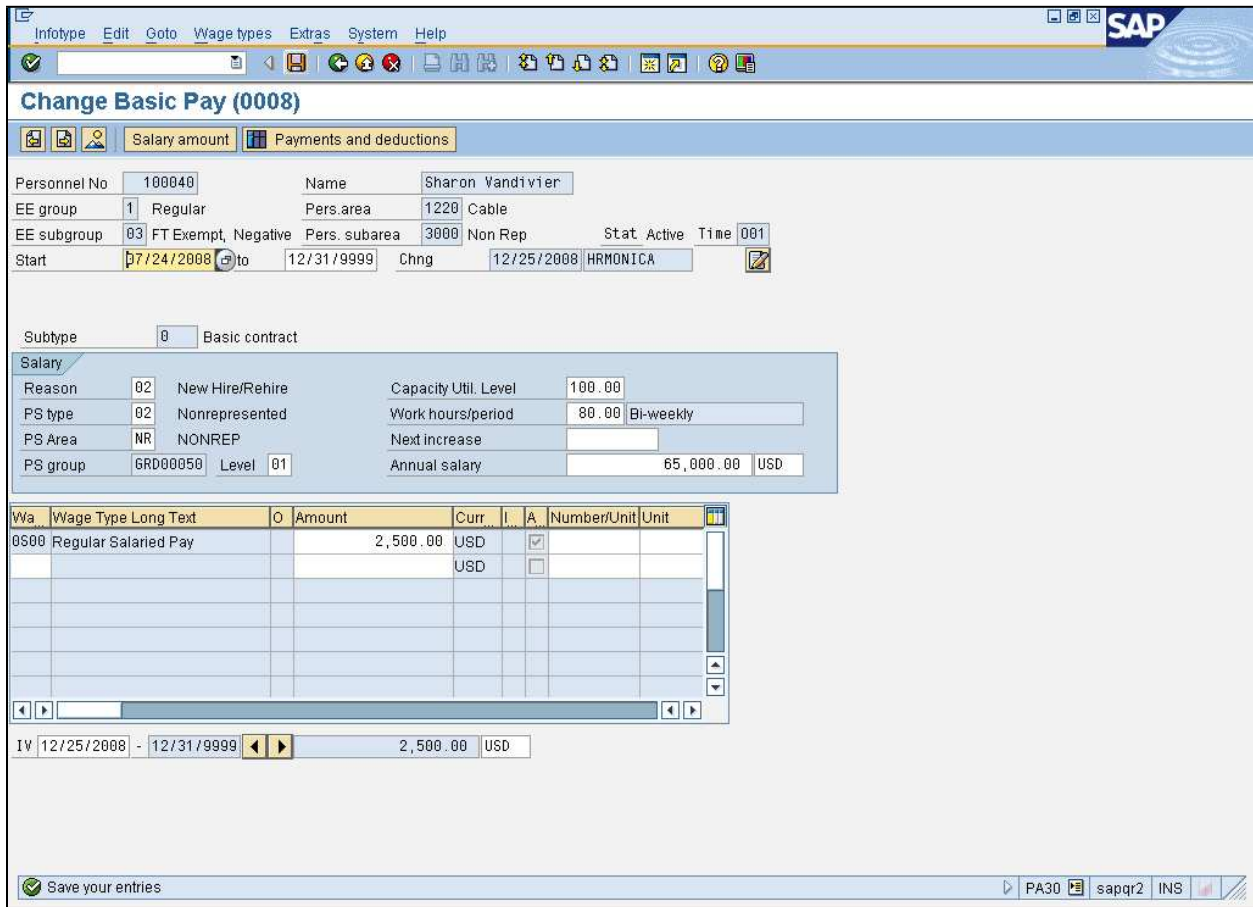**62.** As required, complete/review the following fields:

Field	R/O/C	Description
Text	R	Free text field used to provide additional information or an item description with reference to the current activity.
		Example: Employee approved at midpoint for hire. See paperwork.

Enter Personnel Action - New Hire (PA40)

63. Click **Save** button . The *Create Basic Pay (0008)* screen displays.

Create Basic Pay (0008)

64. Click **Save** button . The *Create Bank Details (0009)* screen displays.

The system returns the message, *"Save your entries".*

This icon indicates a note is present on this infotype to review.

Enter Personnel Action - New Hire (PA40)

Create Bank Details (0009)

65. Click **Enter** button [✓] .

> The system returns the message, *"Record created".*

> Populate by either saving the default information presented in the infotype, or enter the direct deposit information. Forward the forms to Central Payroll for verification.

66. Click **Save** button [💾] . The *Change Date Specifications (0041)* screen displays.

> The system returns the message, *"Save your entries".*

Enter Personnel Action - New Hire (PA40)

Change Date Specifications (0041)

67. Click **Enter** button ![Enter] .

> The system returns the message, *"Record created".*

68. Click **Save** ![Save] . The *Create Additional Personal Data (0077)* screen displays.

Enter Personnel Action - New Hire (PA40)

Create Additional Personal Data (0077)

69. Click **Ethnicity(New)** combo box ⬚ .

70. Select **Not Hispanic/Latino** list item Not Hispanic/Latino .

71. Select **Asian** check box ⬚ Asian .

72. Select **Non-veteran** check box ⬚ Non-veteran .

The system returns the message, *"Save your entries"*.

73. Click **Enter** button ✓ . The *Create Additional Personal Data (0077)* screen updates.

74. Click **Save** button 🖫 . The *Create Monitoring of Tasks (0019)* screen displays.

Enter Personnel Action - New Hire (PA40)

Create Monitoring of Tasks (0019)

75. Click **Task Type** combo box   .

> The system returns the message, *"Record created"*.

76. Select **End of Probation** list item   End of Probation   .

77. As required, complete/review the following fields:

Field	R/O/C	Description
Date of Task	R	Task type effective date. **Example:** 042409

Enter Personnel Action - New Hire (PA40)

78.   Click **Enter** button ⊘ . The *Create Monitoring of Tasks (0019)* screen updates.

79.   Click **Save** button 💾 . The *Subtypes for infotype "Drivers Licence Info (0185)" (XXXX)* dialog box displays.

ℹ   The system returns the message, *"Save your entries".*

**Subtypes for infotype "Drivers Licence Info (XXXX)" (YYYY)   ZZZZ
Entry found**

IC	Description
DL	Drivers License

1 Entry found
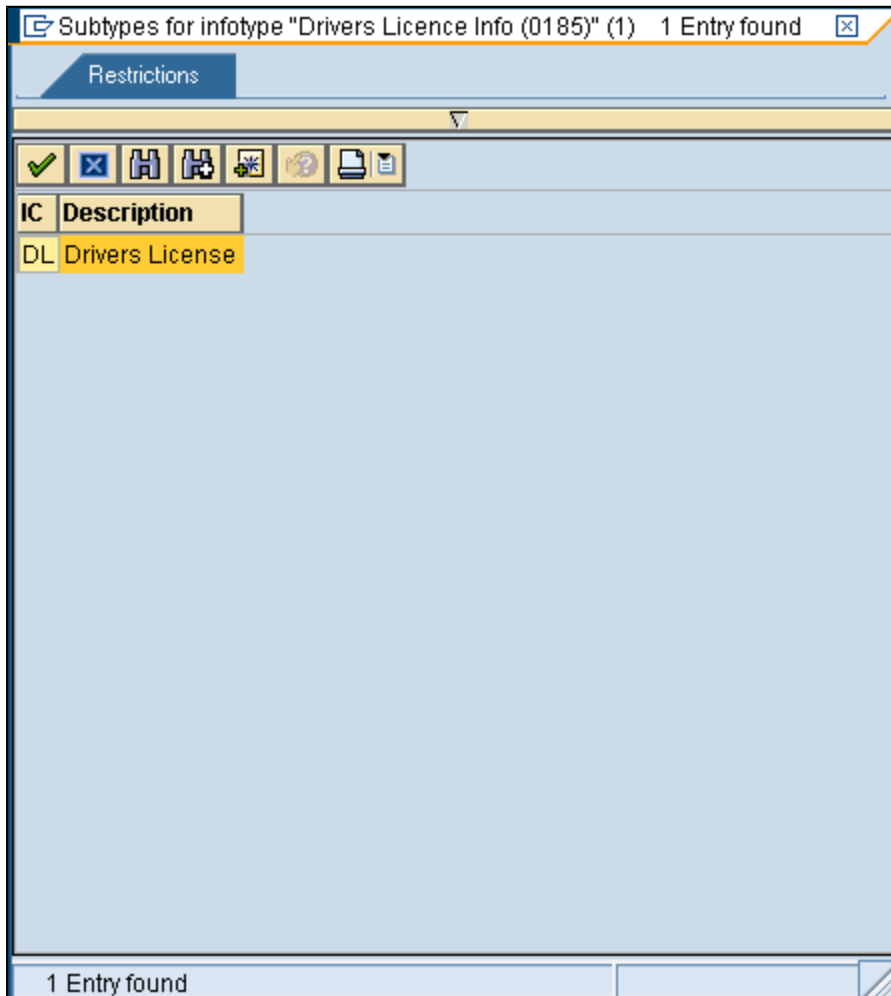
80.   Double-click **DL Drivers License** list item   `DL Drivers License` .

Enter Personnel Action - New Hire (PA40)

Create Drivers Licence Info (0185)

81. Click **ID number** field ☑ .

The system returns the message, *"Record created".*

82. As required, complete/review the following fields:

Field	R/O/C	Description
ID number	R	This field stores the identification/document number provided by the employee to establish personal identity. **Example:** 99874313

Enter Personnel Action - New Hire (PA40)

Field	R/O/C	Description
Valid to	R	Ending date when specifying a range of dates. **Example:** 07/24/2010
Place of issue	R	The state, city or other location where the object was issued. **Example:** OR

83.   Click **Enter** button   .

84.   Click **Save** button   . The *Create Objects on Loan (0040)* screen displays.

The system returns the message, *"Save your entries"*.

Enter Personnel Action - New Hire (PA40)

Create Objects on Loan (0040)

85. Click **Object on loan** field ☑ .

🛈 The system returns the message, *"Record created".*

86. Click **Object on loan** matchcode 🗗 . The *Object on loan (XXXX)* dialog box displays.

Enter Personnel Action - New Hire (PA40)

Object on loan (XXXX)   YYYY Entries found

87. Double-click **06 Cell Phone** list item   ` 06    Cell Phone ` .

Enter Personnel Action - New Hire (PA40)

Create Objects on Loan (0040)

88. As required, complete/review the following fields:

Field	R/O/C	Description
Number	R	Unique identifier assigned to a notification, work order, or a customer/vendor profile ID. **Example:** 1

89. Click **unit** field [   ] .

90. Click **unit** matchcode [icon] . The *Unit of time/meas. (XXXX)* dialog box displays.

Enter Personnel Action - New Hire (PA40)

Unit of time/meas. (XXXX)   YYYY Entry found

Unit of time/meas. (1)   1 Entry found

Restrictions

Unit
Pieces

1 Entry found

91. Double-click **Pieces** list item Pieces . The *Create Objects on Loan (0040)* page updates.

Enter Personnel Action - New Hire (PA40)

Create Objects on Loan (0040)

92. As required, complete/review the following fields:

Field	R/O/C	Description
Loan object no.	R	A unique, user-defined number representing the object on loan. **Example:** 124567
Line 1	R	 **Example:** Motorola

Enter Personnel Action - New Hire (PA40)

93. Click **Enter** button ✅ . The *Create Objects on loan (0040)* screen updates.

94. Click **Save** button 💾 .

The system returns the message, *"Save your entries"*.

The system returns the message, *"Record created"*.

Enter Personnel Action - New Hire (PA40)

Result

You have entered data for a new employee.