

Chapter 6 Retiree Actions



Process an Employee Retirement

This action uses the Copy mode for several infotypes. It is important that you remember the information that might default into the fields is from a previous action.

Menu Path: HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS

Transaction Code: **PA40**

Action type	Personnel no.	EE group	EE subgroup
<input type="checkbox"/> New Hire			
<input type="checkbox"/> Change in Position / Transfer			
<input type="checkbox"/> Multiple Position Assignment			
<input type="checkbox"/> Separation			
<input type="checkbox"/> Rehire			
<input type="checkbox"/> Leave of Absence			
<input type="checkbox"/> Return from Leave of Absence			
<input type="checkbox"/> Adjustment in Pay			
<input checked="" type="checkbox"/> Retirement			
<input type="checkbox"/> External Hire			
<input type="checkbox"/> External Separation			

Field Name	Description	R/O/C	User Action/Values
Personnel no.	The individual's personnel number in the system	R	Enter the employee's number if known or use the dropdown menu to select.
From date	The date the action is effective	R	Enter the employee's last day of work before the retirement
Action type	The type of action to be performed	R	Click on and highlight the Retirement action



Select the Execute Icon

The screen will now show infotype 0000 – Copy Actions

Copy Actions
 Infotype Edit Goto Extras System Help

Execute info group Change info group

Pers.no. **4261**
 Name **SNOOPY TEEL**
 EE group **R** Retiree Personnel ar **1353** MWR MID-ATLANTIC REGION
 EE subgroup **RT** Retiree SSN [Redacted]
 From **05/01/2002** to **12/31/9999**

Personnel action
 Action type Retirement
 Reason for action **01** Retired

Status
 Employment Retiree

Organizational assignment
 Position **10006889** Recreation Aide (Gym)
 Personnel area **1353** MWR MID-ATLANTIC REGION
 Employee group **R** Retiree
 Employee subgroup **RT** Retiree

Additional actions

Start date	Act.	Action type	ActR	Reason f.action
05/01/2002	Z7	Retirement	01	Retired

Field Name	Description	R/O/C	User Action/Values
Action type	Retirement	R	This will default in. No Entry required
Reason for Action	The reason the action is being performed	R	Use the dropdown arrow and select Retirement
Employment	User Defined	R	Field will default in.
Special payment	User Defined	R	Field will default in.
Position	User Defined	R	Field will default. Do not change.
Personnel Area	Location of the employee	R	This will default in. No entry required
Employee Group	The assigned group of employees that the individual belongs to.	R	Use the dropdown menu to select Retiree
Employee Subgroup	The assigned subgroup for the employee	R	Use the dropdown menu to select the Retiree

Press the Enter button . You will receive the message “Person and position have different employee groups/subgroups”. Press the Enter key. You will receive the message “Record valid from *date* to *date* delimited at end”. Press the Enter button again.



Save the transaction .

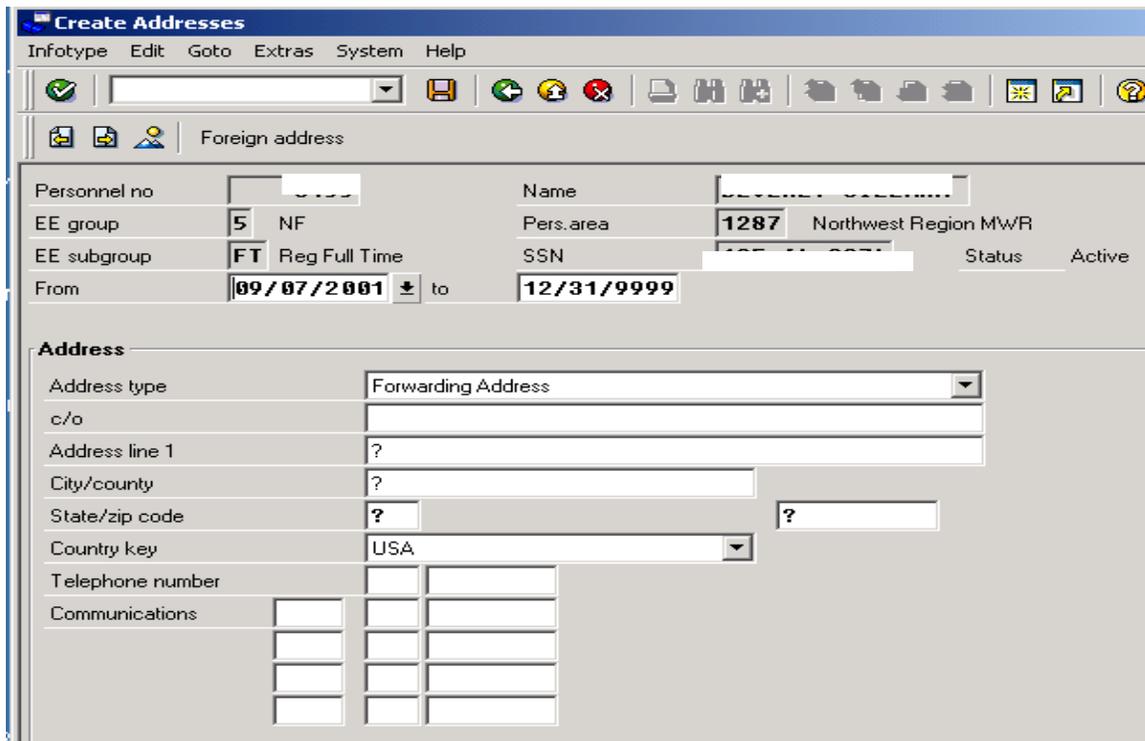
Screen: Infotype 0001 – Copy Organizational Assignment

Field Name	Description	R/O/C	User Action/Values
Co Code	Company Code	R	Field will default in.
Pers Area	Personnel Area	R	Field will default in.
Cost Ctr	Cost Center	R	Field will default in.
Subarea	Personnel SubArea	R	Will default
EE Group	Employee Group	R	Will default to “Retiree” R
EE Subgroup	Employee SubGroup	R	Will default to “Retiree” RT .
Payr Area	Payroll Area	R	Will default to from position
Percentage	Percentage employee assigned to the position	R	Field will default in.

	number		
Position	Position number	R	Field will default in.
Job key	Job Key	R	Field will default in.
Exempt	Exempt status	R	Field will default in.
Org Unit	Organization unit assigned	R	Field will default in.
Org Key	Organization key assigned	R	Field will default in.

Press the Enter button.  You will receive a warning message stating that the record date to date will be delimited. Press the Enter button again.  Save the transaction .

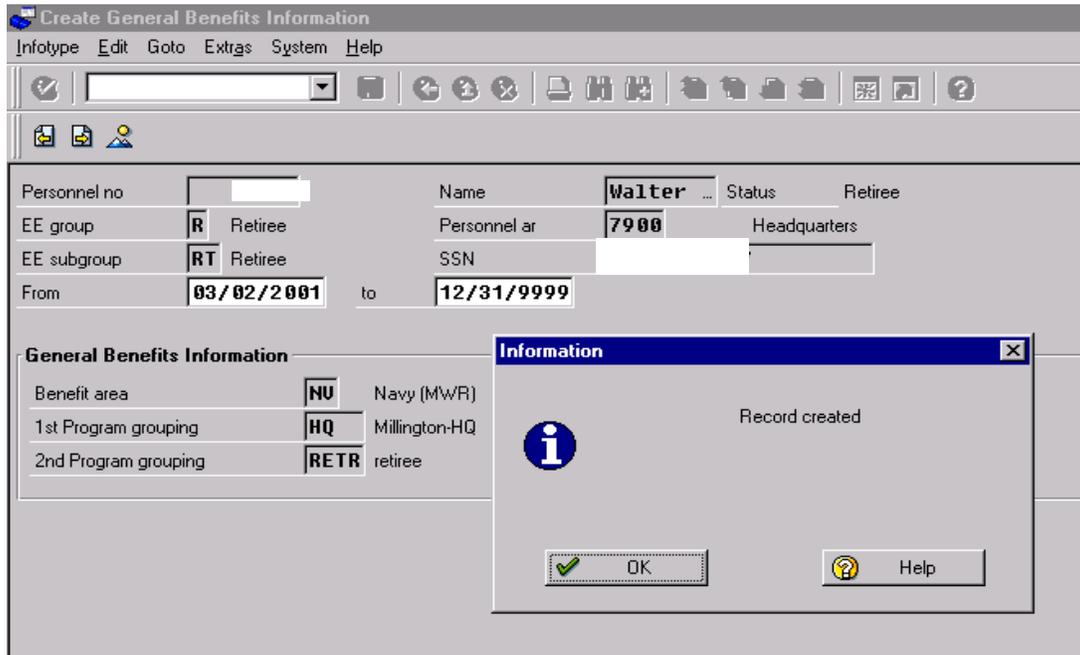
Screen: Infotype 0006-Forwarding Address



Enter the new forwarding address if applicable. Press the Enter button  and Save. If not applicable right arrow to the next screen. This will result in opening infotype 0171 – Create General Benefits Information

All required fields will default in. The information must be validated by pressing the Enter key  and then saving the transaction .

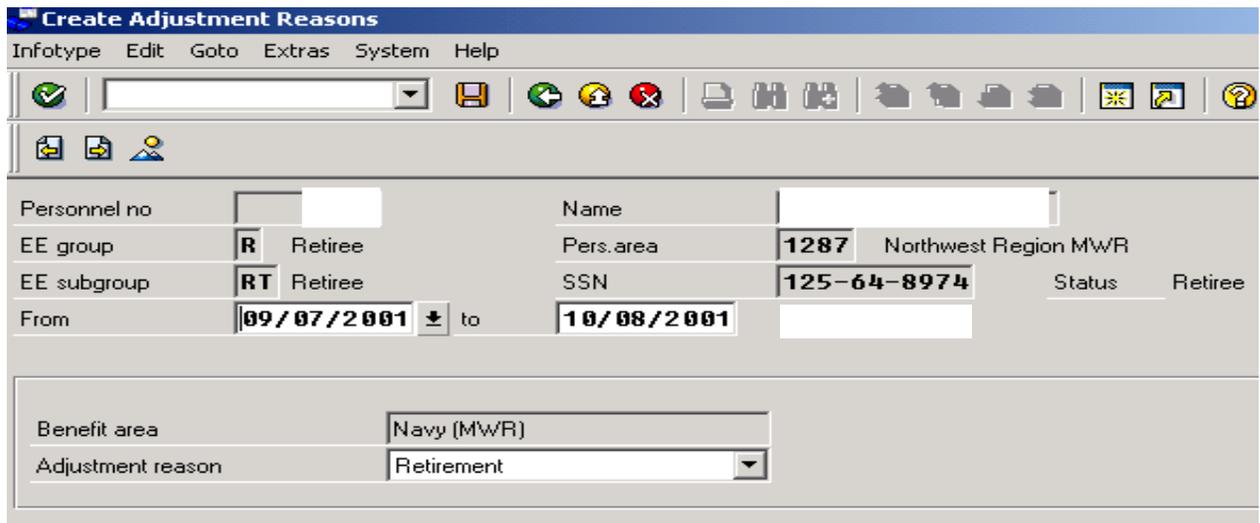
Screen: Infotype 0171 Create General Benefits Information



This infotype must be saved.

After pressing the Enter key and saving the transaction, you will receive the message that the Record has been created and the system will show the final infotype in this action.

Infotype 0378 – Create Adjustment Reasons



This infotype must be saved.

After the retirement record has been created, you must email or print a PAR. Add sick leave and annual leave balances, then print and send or email PAR to payroll.



Process a Retiree Working

This procedure should be used when processing a retired NAF employee into a flexible position. You will be required to enter the former employee's Personnel ID number to begin the action.

Menu Path: HUMAN RESOURCES>PERSONNEL MANAGEMENT>ADMINISTRATION>HR MASTER DATA>PERSONNEL ACTIONS

Personnel Action Screen

Personnel Actions

HR Master Data Edit Goto Extras Utilities Settings System Help

Personnel no. []

Name []

EE group **R** Retiree Pers.area **1034** MWR NAS JACKSONVILLE

EE subgroup **RT** Retiree

From **11/15/02**

Status **2** Retiree

Action type	Personnel ar	EE group	EE subgroup
<input type="checkbox"/> New Hire			
<input type="checkbox"/> Change in Position			
<input type="checkbox"/> Multiple Position Assignment			
<input type="checkbox"/> Separation			
<input type="checkbox"/> Retirement			
<input type="checkbox"/> Rehire			
<input type="checkbox"/> Leave of Absence			
<input type="checkbox"/> Return from Leave of Absence			
<input type="checkbox"/> Adjustment in Pay			
<input type="checkbox"/> Annual Appraisal			
<input type="checkbox"/> Cash Award / Lump Sum Payment			
<input type="checkbox"/> External Hire			
<input type="checkbox"/> External Change in Position			
<input type="checkbox"/> External Separation			
<input type="checkbox"/> External Rehire			
<input type="checkbox"/> Retiree Working New Hire			
<input checked="" type="checkbox"/> Retiree Working Rehire			

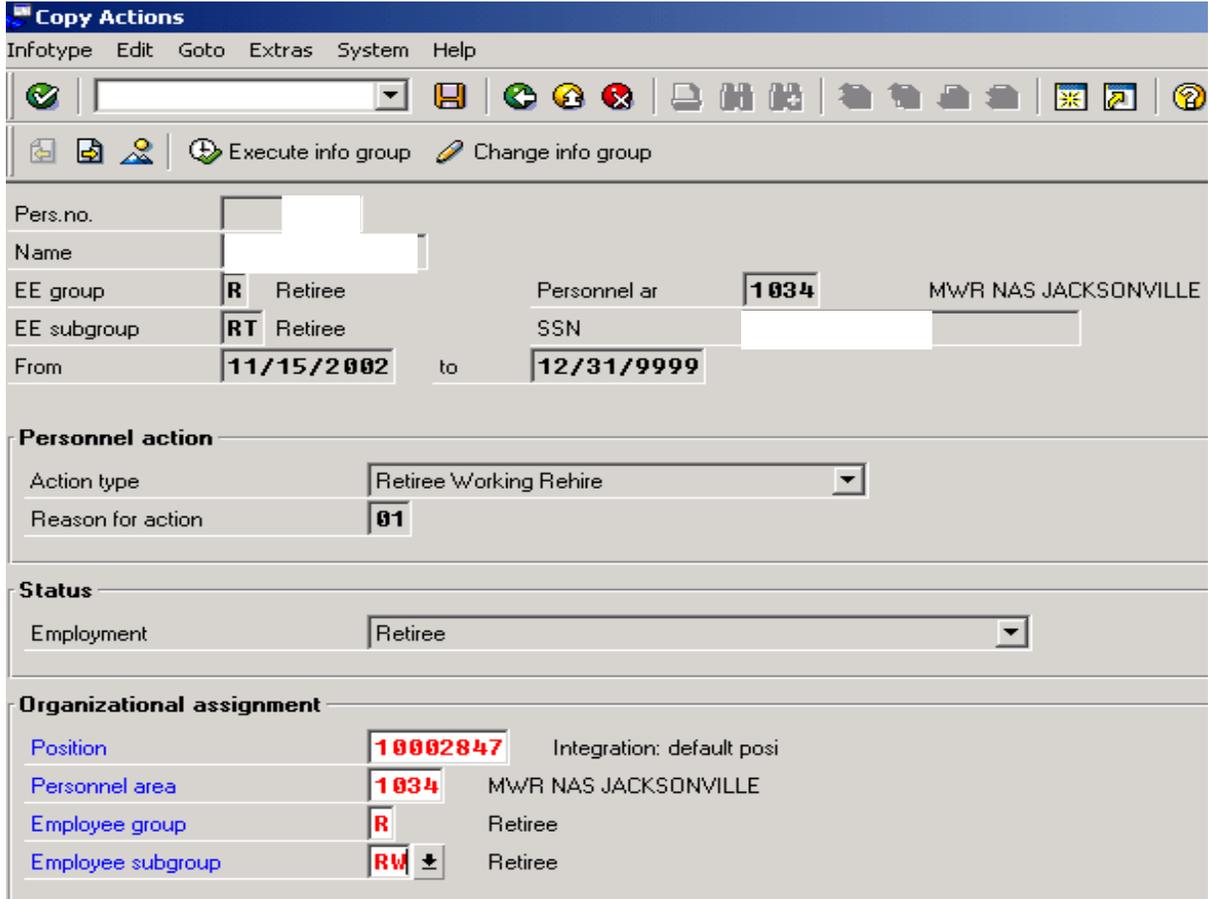
The following screens will automatically roll during the Multiple Position Action.

Personnel Action Screen:

1. Enter the personnel number of the retiree
2. Enter the effective date of working in a Flex position
3. Select the "Retiree Working Rehire" action
4. Click on execute

Copy Actions will now come up.

Copy Actions



Copy Actions

Infotype Edit Goto Extras System Help

Execute info group Change info group

Pers. no. [redacted]
Name [redacted]
EE group **R** Retiree Personnel ar **1034** MWR NAS JACKSONVILLE
EE subgroup **RT** Retiree SSN [redacted]
From **11/15/2002** to **12/31/9999**

Personnel action

Action type Retiree Working Rehire
Reason for action **01**

Status

Employment Retiree

Organizational assignment

Position **10002847** Integration: default posi
Personnel area **1034** MWR NAS JACKSONVILLE
Employee group **R** Retiree
Employee subgroup **RW** Retiree

Copy Action Screen

1. Reason for Action - Enter reason for action “01” retiree working rehire.
2. Position - Enter new position number
3. Blank out Personnel Area – Hit enter and personnel area will default from the position number
4. Employee Group - Leave the employee group as “R” retiree
5. Employee Subgroup - Change the employee subgroup to “RW” retiree working
6. Enter and Save

You will receive a warning that person and position have different employee groups/subgroups. Enter again. You will receive a message that the previous record will be delimited. Enter again.

Copy Personal Data: If changes to the infotype need to be made, make the changes and save. Otherwise, validate the entries and save,

Organizational Assignment will now come up

Copy Organizational Assignment

Personnel no [] Name []
EE group **R** Retiree Pers.area **1034** MWR NAS JACKSONVILLE
EE subgroup **RT** Retiree SSN [] Status Retiree
From **11/15/2002** to **12/31/9999**

Enterprise structure
CoCode **1034** MWR NAS JACKSONVILLE
Pers.area **1034** MWR NAS JACKSONVILLE Subarea **1034** JACKSONVILLE
Cost ctr **143** GUTTERBALL GR FOOD

Personnel structure
EE group **R** Retiree Payr.area **JX** JACKSONVILLE MWR
EE subgroup **RW** Flex Retiree Working

Organizational plan
Percentage **100.00** Assignment
Position **10002847** NA 7408 03
Job key **10001151** NA 7408 03
Exempt **N** Food Service Worker
Org. unit **10001711** Gutter Grill
Org.key **1034** Gutterball Grill

Copy Organizational Assignment Screen

1. Validate all entries ensuring EE Group is “R” and EE Subgroup is “RW”. Press enter, you will get the warning “previous record will be delimited”, press enter again and save.

Delimit vacancy will now come up. Click on “yes” to delimit the vacancy for the position.

S 10002847 Food Service Worker

Delimit on **11/14/2002**

Yes No **X** Cancel

Infotype 0006 – Copy Address will now come up

Infotype 0006 – Copy Address

Personnel no [redacted] Name [redacted]
EE group **R** Retiree Pers.area **1034** MWR NAS JACKSONVILLE
EE subgroup **RW** Flex Retiree Working SSN [redacted] Status Retiree
From **11/15/2002** to **12/31/9999**

Address

Address type Permanent Residence
c/o [redacted]
Address line 1 166 CEDAR STREET
City/county JACKSONVILLE
State/zip code **FL** Florida **32244**
Country key USA
Telephone number **904** **772-1259**
Communications [redacted]

Make any changes to the employee’s address. Enter and Save.

Residence Tax Area

Personnel no [redacted] Name [redacted]
EE group **R** Retiree Pers.area **1034** MWR NAS JACKSONVILLE
EE subgroup **RW** Flex Retiree Working SSN [redacted] Status Retiree
From **11/15/2002** to **12/31/9999**

Resident data

Tax area ?

Tax Authorities in Area

Tax area	Description	Post
FED	Federal	000
FL	State of Florida	320

Enter the employee’s residence tax area. Enter and Save.

The system will now roll to Copy Withholding W4/W5.

Copy Withholding Info W4/W5 US

Infotype Edit Goto Extras System Help

Personnel no [redacted] Name [redacted]
 EE group **R** Retiree Pers.area **1034** MWR NAS JACKSONVILLE
 EE subgroup **RW** Flex Retiree Working SSN [redacted] Status Retiree
 From **11/15/2002** to **12/31/9999**

Status
 Tax authority **FED** Federal Tax level **A** Federal
 Filing status **01** Single

Exemptions
 Allowances
 Tax exempt indicator IRS mandates

Withholding adjustments
 Add.withholding **20.00** USD

Overrides (from Infotype 0234)

From date	End date	Supplemental method	Tax override	Empl.

Enter the filing status and number of exemptions. If applicable, enter any additional withholding. Enter and Save.

The next infotype will be Infotype 0041-Date Specifications.

Infotype 0041-Date Specifications

Change Date Specifications

Infotype Edit Goto Extras System Help

Personnel no [redacted] Name [redacted]
 EE group **R** Retiree Pers.area **7900** MWR HEADQUARTERS
 EE subgroup **RW** Flex Retiree Working SSN [redacted] Status Retiree
 From **01/01/2001** to **12/31/9999** Chng **11/26/2002** **HQ_P657F8**

Date Specifications

Date type	Date	Date type	Date
01 Activity Start Date	01/10/1987	03 Service Comp Date	01/10/1987

Update any fields necessary.

Date type 01 Activity Start Date, which is the first date of employment at the current activity. This date populates from the action.

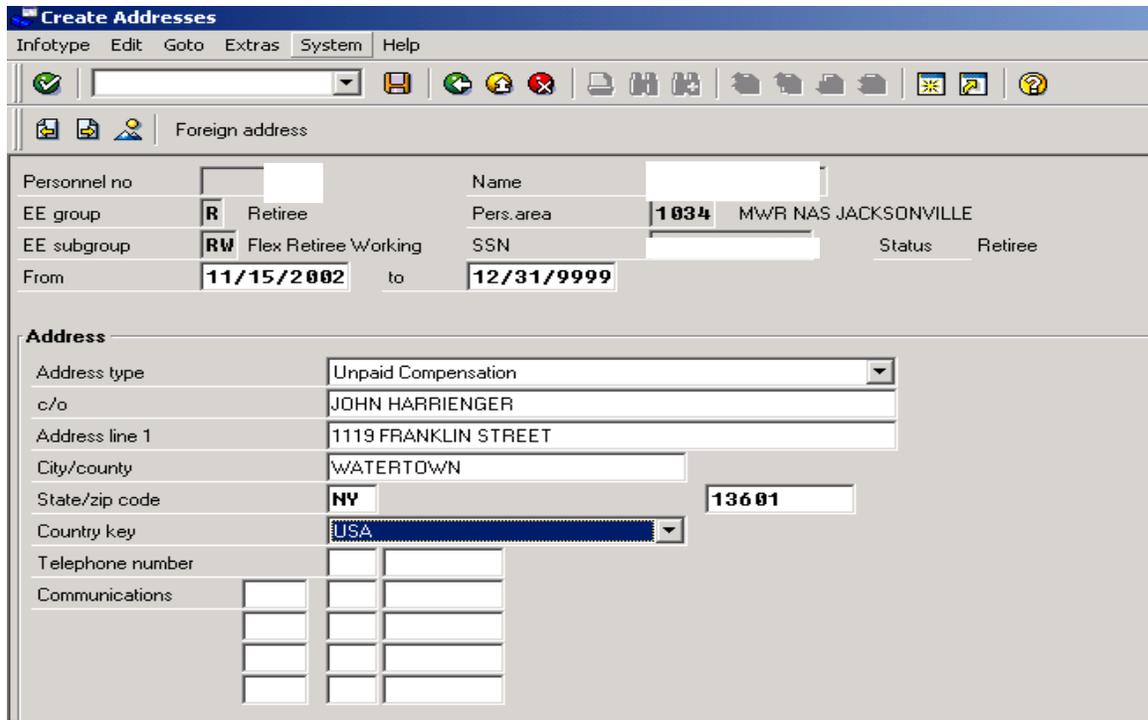
Date type 04 Civilian Service Date, which is the Comp date minus the active duty military time.

Date type 03 Service Computation Date, the date either actual or constructed by crediting service, used to determine annual leave accrual. For an employee with no creditable NAFI or military service, the service comp date is the effective date of the employee's first Federal civilian appointment. For an employee with prior creditable service, the service comp date is constructed by totaling the days, months, and years of the employee's creditable civilian and military service and subtracting that total from the effective date of the employees most recent appointment. When service credit of 4 years, 3 months, and 3 days is subtracted from the date, 1998-10-12, the result is 1994-07-09. Thus, the service comp date will then be 07-09-1994.

Date type 07 NAFI Computation Date, the date either actual or constructed by crediting service, used to determine Regular NAFI employment length. For an employee with prior creditable service, The NAFI computation date is constructed by totaling the days, months, and years of the employee's creditable Regular NAFI service and subtracting that total from the employee's most recent appointment.

Press the Enter button and Save  the transaction.

Unpaid Compensation Beneficiary Address



The screenshot shows the 'Create Addresses' window with the following data:

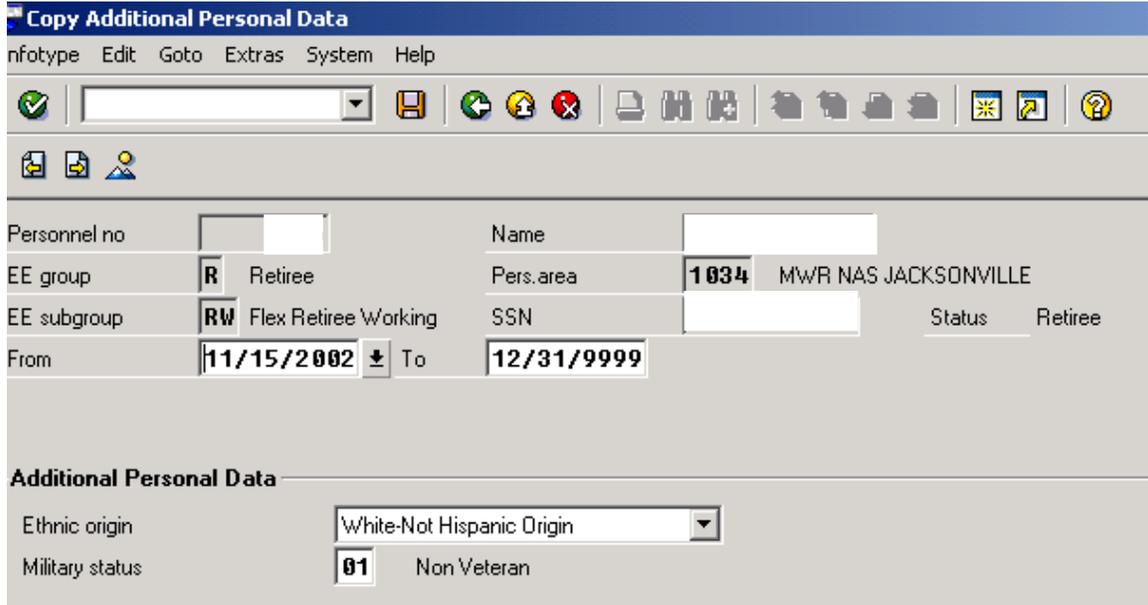
Personnel no		Name			
EE group	R Retiree	Pers.area	1034 MWR NAS JACKSONVILLE		
EE subgroup	RW Flex Retiree Working	SSN		Status	Retiree
From	11/15/2002	to	12/31/9999		

Address

Address type	Unpaid Compensation		
c/o	JOHN HARRIENGER		
Address line 1	1119 FRANKLIN STREET		
City/county	WATERTOWN		
State/zip code	NY	13601	
Country key	USA		
Telephone number			
Communications			

Enter the employee's unpaid compensation beneficiary name and address. Enter and Save.

The next screen is **Infotype 0077 - Additional Personal Data**



Copy Additional Personal Data

Infotype Edit Goto Extras System Help

Personnel no [] Name []

EE group **R** Retiree Pers.area **1034** MWR NAS JACKSONVILLE

EE subgroup **RW** Flex Retiree Working SSN [] Status Retiree

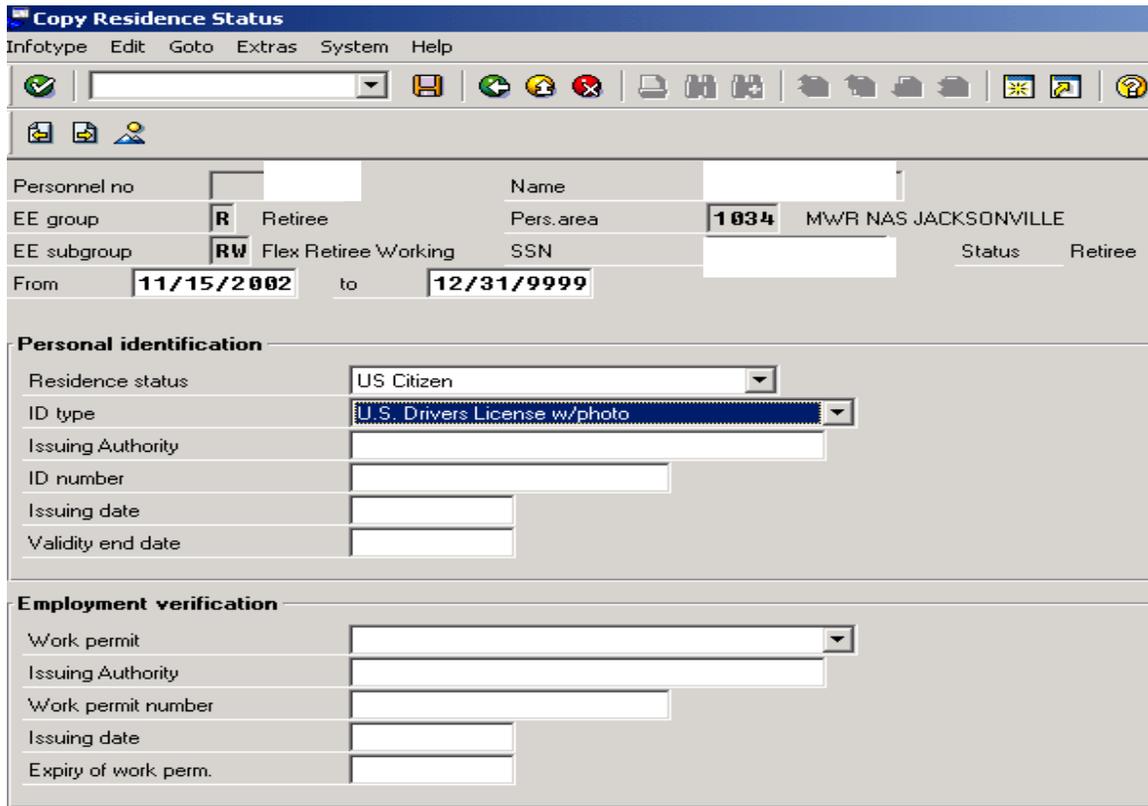
From **11/15/2002** To **12/31/9999**

Additional Personal Data

Ethnic origin White-Not Hispanic Origin

Military status **01** Non Veteran

Select the Ethnic Origin and Military Status from the drop downs. Enter and Save. Copy Residence Status will now come up.



Copy Residence Status

Infotype Edit Goto Extras System Help

Personnel no [] Name []

EE group **R** Retiree Pers.area **1034** MWR NAS JACKSONVILLE

EE subgroup **RW** Flex Retiree Working SSN [] Status Retiree

From **11/15/2002** to **12/31/9999**

Personal identification

Residence status US Citizen

ID type U.S. Drivers License w/photo

Issuing Authority []

ID number []

Issuing date []

Validity end date []

Employment verification

Work permit []

Issuing Authority []

Work permit number []

Issuing date []

Expiry of work perm. []

Enter the employee's Residence Status. Enter and Save.

Create Education

Create Education			
Infotype Edit Goto Extras System Help			
Personnel no	582	Name	LUISA BECK
EE group	1 NA	Pers.area	8034 VQ NAS JACKSONVILLE
EE subgroup	FT Reg Full Time	SSN	558-51-5220 Status Active
From	09/01/1965 to	06/01/1969	
Educational est. U3 College/university			
Institute/location UNIVERSITY OF FLORIDA			
Certificate 02 Bachelor			
Branch of study 1 10002 Business Administration/Management			
Branch of study 2			

Enter the employee's Educational Establishment. Enter and Save.

Infotype 9001 – DOD/MWR Data

Copy DOD / MWR Specific Data			
Infotype Edit Goto Extras System Help			
Personnel no		Name	
EE group	R Retiree	Pers.area	1034 MWR NAS JACKSONVILLE
EE subgroup	RW Flex Retiree Working	SSN	Status Retiree
From	11/15/2002 to	12/31/9999	
Locale Information			
DOD NAFI organization code	NU22	Navy NAFI	
Duty station location	12151003	Jacksonville, FL	
NAF personnel office identifier	10034	Jacksonville, FL	
DOD MWR activity code	48	None of the above	
USA Funding Under MDA			
USA indicator	N	Not covered under USA MDA	
Miscellaneous			
Welfare to work hire code	D	Hired on or before March 7, 1997	
DOD dependent-sponsor relationship	ZZ	Not applicable. Not a dependent of a sponsor.	
Person designator type code	S	Social security number	
Off duty military code	N	No; not a military member on active duty	
Source of recruitment			
Union eligibility			
Bargaining unit eligibility code	N	Supervisory / Management Official	
Bargaining unit member status	N	Not Member of Bargaining Unit	

Retirement Information	
Retirement plan code	<input type="text"/>
Retirement certificate number	<input type="text"/>
Portability of retirement election	Z None of the above
Appr. fund severance pay entitled	N Not applicable
Portability of benefits status code	N Not covered

Position Information	
Position sensitivity	1 Non-Sensitive
Supervisor position	N
Local PD number	<input type="text"/>

ADP Information	
ADP company code	NAJ
ADP file number	001634

Miscellaneous Notes	
<input type="text"/>	

Most of the fields on this 9001 infotype are REQUIRED and are mandated by various DOD or MWR policies. Here is the explanation of the various fields.

Field Name	Description	R/O/C	User Actions/Values
DOD NAFI Organization Code	NAFI Organization code	R	Will always be “grayed out” and populated with NV22
Duty Station Location	Where the employee will work	R	Use dropdown menus to complete
NAF Personnel Office Identifier	The Personnel Office involved	R	This will default from personnel area
DOD MWR Activity Code	The DOD description of the activity	R	Use dropdown menus to complete, request assistance from finance manager if needed
USA Indicator	Whether the activity will be reimbursed using the USA process	R	Use dropdown menus to complete, find information on 52.
Welfare to work hire code	Mandated since 1997	R	Use dropdown menus to complete, use OPM form 1635
DOD Dependent/Sponsor relationship	Is there a relationship?	R	Use dropdown menus to complete
Person Hispanic Category Code	Hispanic Category?	R	Use dropdown menus to complete

Person Designator type code	Social Security or other	R	Use dropdown menus to complete
Off Duty Military Code	Is the Employee on Active duty?	R	Use dropdown menus to complete
Source of Recruitment	What tools did we use to hire this new employee?	O	Locally defined and used
Bargaining Unit Eligibility code	In a supervisory position?	R	Use dropdown menus to complete
Bargaining unit member status	A member of a bargaining unit?	R	Use dropdown menus to complete if activity has union
Retirement Certificate Number	HQ will populate	O	Do not populate—headquarters only
Portability of Retirement Election	Is the employee eligible for portability?	R	Use dropdown menus to complete
Appr. Fund Severance Pay entitlement	Was the employee receiving APF Severance pay when hired NAF?	R	Use dropdown menus to complete
Portability of benefits status code	Identifies employees who moved after Jan 1, 1987 without a break in service of more than three days.	R	Use dropdown menus to complete
Position Sensitivity	Is this a sensitive position from a security standpoint?	R	Use dropdown menus to complete, see OF8
Supervisor Position	Is this position a supervisory one?	R	Use dropdown menus to complete
Local PD Number	For local HR use	O	Enter the PD number if required by local HR
ADP Company Code	ADP Payroll processing code	C	Will populate from ADP information when nightly interface between SAP and ADP is run
ADP File Number	ADP Payroll Processing file number	C	Will populate from ADP information when nightly interface between SAP and ADP is run
Misc. Notes		O	Any additional comments if needed

Press the Enter button and Save  the transaction.

The screen will roll to the next infotype 9005 – Create Kronos Information

Field Name	Description	R/O/C	User Actions/Values
Kronos badge Number	Kronos badge number	C	Enter the KRONOS badge number. Entry is required for KRONOS. If KRONOS is not used, select the No Kronos System checkbox.
Kronos Terminal Group	Kronos Terminal number	C	Enter the Terminal Group from the dropdown menu. Entry is required for KRONOS. If KRONOS is not used, select the No Kronos System checkbox.
Person Type	Person Type	C	Enter the Person Type from the dropdown menu. See explanation below.
Kronos Logon	Kronos Logon	C	This field will default.
Access Profile	Access Profile	C	Enter the employee's profile from the dropdown menu. See explanation below.

Labor Level Set	Kronos Labor Level Set	C	This will only be added to managers to tell KRONOS which group of employees the manager will administer. Select from the dropdown.
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Kronos Person Type	
Pers Type	Short text
1	TK Employee
2	Prof Employee
3	Manager
4	Types 1, 2, and 3
5	Types 1 and 3

TK Employee – punches in and out at a timekeeper terminal or paid by schedule. Not a manager or a timestamp employee. Only choose this option if the employee is not a manager or timestamp employee.

Prof Employee – enters time via timestamp, but not responsible for managing other employees time.

Manager - ability to edit and maintain employee data within Workforce Central. This option may be used for GS managers who are not also timekeeper employees (they don't use Kronos to record their time, they just log in to manage their employees)

Types 1,2, and 3 - An employee who enters time via timestamp who is also a manager.

Types 1 and 3 - A timekeeper employee who is also a manager. These employees could clock in using terminals or are paid by schedule. They are also responsible for editing and approving timecards for their employees.

Kronos Function Access Profile	
Access Profile	
EMPLOYEE	
MANAGER 1	
MANAGER 2	
PAYROLL	
TIMEKEEPER	

Employee – for Time Stamp employees only.

Manager 1 – will be able to approve timecards, but cannot sign off.

Manager 2 – will be able to approve and sign off timecards.

Payroll – used for payroll employees.

Timekeeper – will be able to edit timecards, schedules, but cannot sign off.

Note: Employee must have either a Kronos badge number or have the No Kronos box checked.

Press the Enter button and Save  the transaction.

Copy Planned Working Time

Infotype Edit Goto Extras System Help

Work schedule

Personnel no [redacted] Name [redacted]
 EE group **R** Retiree Pers.area **1034** MWR NAS JACKSONVILLE
 EE subgroup **RW** Flex Retiree Working SSN [redacted] Status Retiree
 From **11/15/2002** To **12/31/9999**

Work schedule rule

Work schedule rule **1017** JXFXNALS NOMEAL

Working time

Employment percent	100.00
Daily working hours	8.03
Weekly working hours	40.13
Monthly working hrs	173.91
Annual working hours	2087.00
Weekly workdays	5.00

The only entry is the Work Schedule Rule. Note: Retiree Working is a Flex Employee.

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon  again. You will be reminded to Save your entries.

Press the Save icon .

Create Basic Pay – Infotype 0008

Create Basic Pay
 Infotype Edit Goto Wage types Extras System Help

Salary amount Payments and deductions

Personnel no: [REDACTED] Name: [REDACTED]
 EE group: **R** Retiree Pers.area: **7900** MWR HEADQUARTERS
 EE subgroup: **RW** Flex Retiree Working SSN: [REDACTED] Status: Retiree
 From: **11/18/2002** to: **12/31/9999**

Pay scale

Reason: **13** Retiree Working Cap.util.lvl: **100.00**
 Type: **01** Navy MWR WkHrs/period: **80.26** Bi-weekly
 Area: **01** AC 098
 Group: **NF 03** Level: **00** Annual salary: **18,259.00** USD

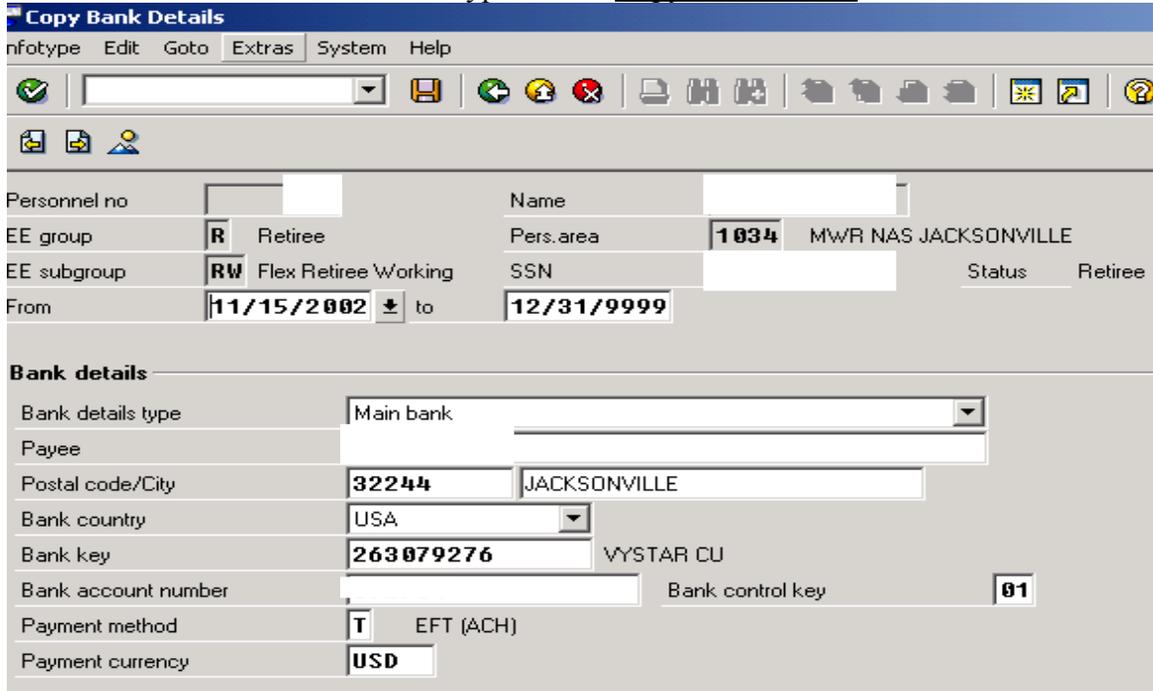
Wage	Wage type name	Op	Amount	Currenc	Inc	Ad	Number	Unit
1010	Hourly Rate - MWR		8.75	USD		<input checked="" type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		

You will receive most of this information from the SF52 paper form or the employee data sheet. While all of the fields are required, some will default based on other inputs. All field entries must be validated and verified as they all affect the new employee's pay.

Field Name	Description	R/O/C	User Action/Values
Reason	Reason for change	R	Select 13 - Retiree Working from the drop down.
Type	User Defined	R	Field will default
Area	User Defined	R	Field will default.
Group	User defined	R	<u>You must use the dropdown menu to select.</u> Must be verified for accuracy
Level	Level of Pay	R	Field will default. Must be verified for accuracy.
Hourly Rate Wage types: 1010 = Hourly rate	Enter the correct rates for each wage type listed	R	Enter the hourly rate(s), for NF's and CC's – all others will populate when user hits enter. Can override for save pay.
Note: Seattle will need to override hourly rate for crafts and trade only in AC 143.			
Work/Hrs Period	The hours of work in a specific period	R	This field will default in
Capt util. Lvl	Used for Annual salary calculation	R	This field defaults "100".

Press the Enter button and Save  the transaction.

The screen will roll to the next infotype 0009 – Copy Bank Details



Bank details data are used by the automatic employee vendor creation program in accounts payable.

Field Name	Description	R/O/C	User Action/Values
Bank Details Type	Type of bank for this Employee	R	Will default to main bank
Payee	Employee's name	R	Will default
Postal code/City	Zip code/City	R	Will default
Bank Country	Bank Country	R	Will default USA
Bank Key	The name of the bank the funds are to be deposited into	R	Enter the employee's bank deposit transit/ABA number from direct deposit sign up form.
Bank Control Key	The type of account	R	Must be 01 Checking or 02 Savings
Bank Account Number	Bank account number	R	Enter the employee's bank account number.
Payment Method	EFT or a check for the payment?	R	Will default to "T" for direct deposit. Change to "C" only if waiver from MWR HQ is approved.
Payment Currency	Payment Currency	R	Will default to USD

Press the Enter button and Save  the transaction.

The screen will roll to the next infotype 0006 – Copy Addresses, subtype 2 Address, Emergency Contact

 **NOTE:** According to the United States Postal Service Sorting Facility all names and addresses must be entered into the system using upper case letters (ALL CAPS) and NO punctuation except the hyphen between the first five numbers in a Zip code and the last four.

Field Name	Description	R/O/C	User Action/Values
Address type	Type of Address	R	Defaults Emergency Contact –
C/O	In care of	R	Enter the emergency contact’s first and last name (and relationship if available)
Address	Street name and number	R	Must populate this field, can enter “address unknown”
City/County	City	R	Enter the contact’s city. If unknown, use the employee’s.
State/Zip Code	State/Zip Code	R	Enter the contact’s state and zip. If unknown, use the employee’s
Country key	The contact’s country key	C	Will default to USA
Telephone Number	Telephone	R	Contact’s telephone number
Communications	Additional numbers	O	May be used for additional contact phone numbers.

Press the Enter button and Save  the transaction.

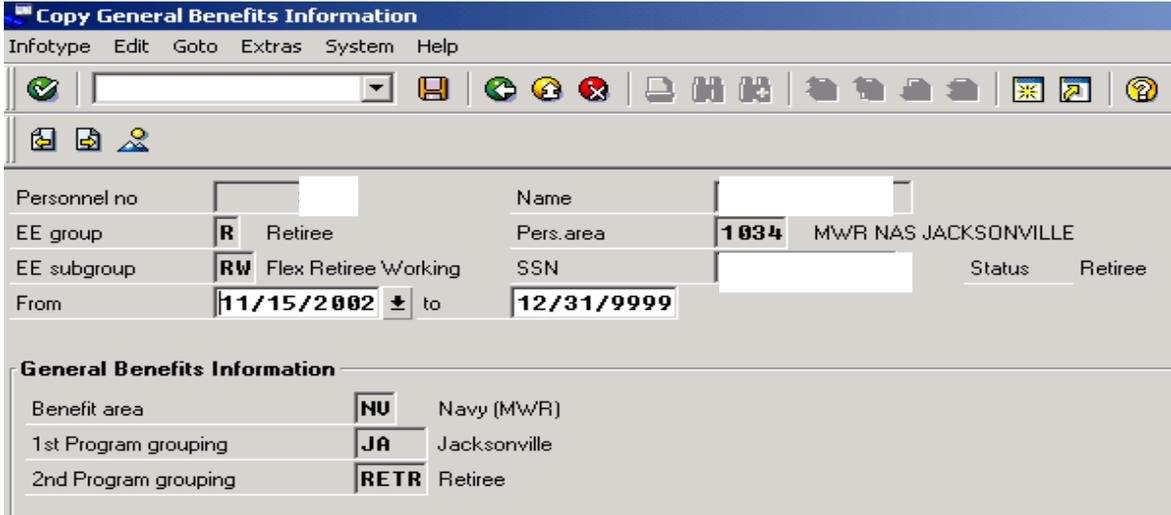
The screen will roll to the next infotype 0004 – Copy Challenge.

This screen must be completed! Enter “99” in both fields if challenge not applicable.

Field Name	Description	R/O/C	User Action/Values
Challenge group	Two digit code	R	Use drop down arrow to select, refer to form SF256, or enter 99 if not applicable
Type of challenge	Two digit code	R	Use drop down arrow to select, refer to form SF256, or enter 99 if not applicable

Press the Enter button and Save  the transaction.

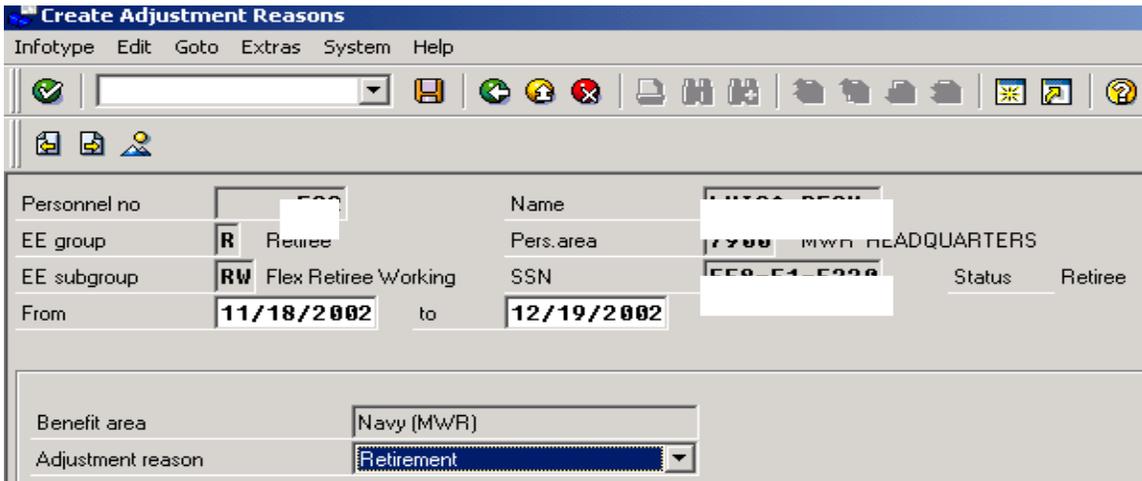
The screen will roll to the next infotype 0171 – Copy General Benefits Information



Personnel no		Name	
EE group	R Retiree	Pers.area	1034 MWR NAS JACKSONVILLE
EE subgroup	RW Flex Retiree Working	SSN	
From	11/15/2002	to	12/31/9999
General Benefits Information			
Benefit area	NU	Navy (MWR)	
1st Program grouping	JA	Jacksonville	
2nd Program grouping	RETR	Retiree	

When the screen showing this infotype 0171 – Copy General Benefits Information appears, all fields will be defaulted. You will validate the entries and **ONLY** save the infotype by clicking the Save icon. 

Screen: Infotype 0378 – Create Adjustment Reasons



Personnel no		Name	
EE group	R Retiree	Pers.area	1034 MWR HEADQUARTERS
EE subgroup	RW Flex Retiree Working	SSN	
From	11/18/2002	to	12/19/2002
Benefit area	Navy (MWR)		
Adjustment reason	Retirement		

When the screen showing this infotype 0378 – Create Adjustment Reasons appears, all fields will be defaulted. You will validate the entries and **ONLY** save the infotype by clicking the Save icon . Print a PAR if needed for the Retiree Working Position.



Process a Change in Position for a Retiree Working

Menu Path:

HUMAN RESOURCES>PERSONNEL MANAGEMENT>ADMINISTRATION>HR MASTER DATA>PERSONNEL ACTIONS

Transaction Code: **PA40**

This procedure describes the steps necessary to process a change in position for a retiree working in a flexible position through the SAP Human Resource system. We have highlighted the Retiree Change in Position in the Personnel Actions screen and click on the Execute icon .

Personnel Actions
 HR Master Data Edit Goto Extras Utilities Settings System Help

Personnel no.
 Name Status **2** Retiree
 EE group **R** Retiree Pers.area **1034** MWR NAS JACKSONVILLE
 EE subgroup **RW** Flex Retiree Working Cost center **143** GUTTERBALL GR ...
 From **11/18/2002**

Action type	Personnel ar	EE group	EE subgroup
Multiple Position Assignment			
Separation			
Retirement			
Rehire			
Leave of Absence			
Return from Leave of Absence			
Adjustment in Pay			
Annual Appraisal			
Cash Award / Lump Sum Payment			
External Hire			
External Change in Position			
External Separation			
External Rehire			
Retiree Working New Hire			
Retiree Working Rehire			
▶ Retiree Change in Position			
Option B Resignation			

The system will now roll to infotype 0000 – Copy Actions.

Copy Actions
 Infotype Edit Goto Extras System Help

Execute info group Change info group

Pers.no. [REDACTED]
 Name **HELEN GLENN**
 EE group **R** Retiree Personnel ar **1034** MWR NAS JACKSONVILLE
 EE subgroup **RW** Flex Retiree Working SSN [REDACTED]
 From **11/18/2002** to **12/31/9999**

Personnel action
 Action type Retiree Change in Position
 Reason for action [?] ↓

Status
 Employment Retiree

Organizational assignment
 Position **10002847** Food Service Worker
 Personnel area **1034** MWR NAS JACKSONVILLE
 Employee group **R** Retiree
 Employee subgroup **RW** Flex Retiree Working

Field Name	Description	R/O/C	User Action/Values
Action Type	Action type	R	Will default "Retiree Change in Position."
Reason for Action	Reason for the action	R	Enter the reason for the action using the drop-down.
Clear the following fields: Position, Personnel Area, Employee Group and Employee Subgroup. Then follow instructions below:			
Employment	Status	R	The field will default retiree. No entry can be made.
Position	Position number	R	Should be known, you may enter the position number directly or use the dropdown arrow to select.
After entering position number, click on  or hit enter key to populate the personnel area.			
Employee Group	Will default from the previous position. BLANK IT OUT!	R	Will default. MUST BE CHANGED TO "R" FOR RETIREE.
Employee Sub-group	Will default from the previous position. BLANK IT OUT!	R	Will default. MUST BE CHANGED TO "RW" FOR RETIREE WORKING.

After making the necessary corrections to the Actions Infotype, press the Enter key to validate and Save. You will receive the warning that the “previous record will be delimited”, press the enter key again.

Follow the directions as outlined in Chapter 4, beginning on page 31. This will allow you to complete the Retiree Change in Position action. Each infotype will automatically roll in sequence for completion.



Process a Retiree Working Retirement

Menu Path:

HUMAN RESOURCES>PERSONNEL MANAGEMENT>ADMINISTRATION>HR MASTER DATA>PERSONNEL ACTIONS

Transaction Code: **PA40**

This procedure describes the steps necessary to process a retirement for a retiree working in a flexible position through the SAP Human Resource system. We have highlighted the Retiree Working Retirement in the Personnel Actions screen and click on the Execute

icon  .

Personnel no.	1...			
Name	MARIVIC ESPINILLO	Status	2	Retiree
EE group	R Retiree	Pers.area	8172	VQ NORTHWEST REGION
EE subgroup	RT Retiree	Cost center	901	WHIDBEY VQ GEN.
From	03/15/2003			

Action type	Personnel an	EE group	EE subgroup
<input type="checkbox"/> Retiree Change in Position			
<input type="checkbox"/> Option B Resignation			
<input type="checkbox"/> Vested NAF to GS			
<input type="checkbox"/> Retiree Conversion			
<input type="checkbox"/> Retiree Headquarters			
<input type="checkbox"/> New Hire - SAP Conversion			
<input checked="" type="checkbox"/> Retiree Working Retirement			

The system will roll to infotype 0000-Copy Actions.

Pers.no.

Name

EE group **R** Retiree Personnel ar **8172** VQ NORTHWEST REGION

EE subgroup **RT** Retiree SSN **213-04-3689**

Start **03/16/2003** to **12/31/9999**

Personnel action

Action type Retiree Working Retirement

Reason for action **01** End of RW Assignment

Status

Employment Retiree

Organizational assignment

Position **10005061** Financial Clerk

Personnel area **8172** VQ NORTHWEST REGION

Employee group **R** Retiree

Employee subgroup **RT** Retiree

Additional actions

Field Name	Description	R/O/C	User Action/Values
Action Type	Action type	R	Will default "Retiree Working Retirement"
Reason for Action	Reason for the action	R	Enter "01" End of RW Assignment from the dropdown.
Employment	Status	R	The field will default retiree. No entry can be made.
Position	Position number	R	Field will default. Do not change.
Personnel Area	Location of the employee	R	Field will default. Do not change.
Employee Group		R	Will default to "R" for retiree. Do Not Change
Employee Sub-group		R	Will default. MUST BE CHANGED TO "RT" FOR RETIREE.

Press the Enter button . You will receive the message "Person and position have different employee groups/subgroups". Press the Enter key. You will receive the message "Record valid from *date* to *date* delimited at end". Press the Enter button again.



Save the transaction .

The next infotype will be 0001 - Copy Organizational Assignment.

Copy Organizational Assignment

Infotype Edit Goto Extras System Help

Org Structure

Personnel no: [] Name: []

EE group: **R** Retiree Pers.area: **8172** VQ NORTHWEST REGION

EE subgroup: **RT** Retiree SSN: **213-04-3689** Status: Retiree

Start: **03/16/2003** to: **12/31/9999**

Enterprise structure

CoCode: **8172** VQ COMNAVREG, N.W.

Pers.area: **8172** VQ NORTHWEST REGION Subarea: **8173** VQ NORTH SOUND

Cost ctr: **901** WHIDBEY VQ G/A

Personnel structure

EE group: **R** Retiree Payr.area: **KQ** NW REGION VQ

EE subgroup: **RT** Retiree

Organizational plan

Percentage: **100.00** Assignment

Position: **10005061** NF 0530 02
Financial Clerk

Job key: **10001348** NF 0530 02
Cash Clerk

Exempt: **N**

Org. unit: **10001528** VQGF
VQ General Fund

Org.key: **8173**

All information defaults on this screen. No date will need to be entered, **but you must click the save icon  to save the data.**

The next infotype is 0006 – forwarding address.

Infotype 0006-Forwarding Address

Personnel no: [] Name: []
EE group: 5 NF Pers.area: 1287 Northwest Region MWR
EE subgroup: FT Reg Full Time SSN: 125-64-8974 Status: Active
From: 09/07/2001 to: 12/31/9999

Address
Address type: Forwarding Address
c/o: []
Address line 1: [?]
City/country: [?]
State/zip code: [?] [?]
Country key: USA
Telephone number: [] [] []
Communications: [] [] []

Enter the new forwarding address if applicable. Press the Enter button  and Save. If not applicable right arrow to the next screen.

This will result in opening infotype 0171 – Copy General Benefits Information

All required fields will default in. The information must be validated by pressing the Enter key  and then saving the transaction .

After pressing the Enter key and saving the transaction, you will receive the message that the Record has been created and the system will show the final infotype in this action.

This will result in opening infotype 0378 – Copy Adjustment Reasons.

All required fields will default in. The information must be validated by pressing the Enter key  and then saving the transaction .

This infotype must be saved.

After the retirement record has been created, you must email or print a PAR. Add sick leave and annual leave balances, then print and send or email PAR to payroll.