New Hire Action – Previous State Employee Transaction Code: (PA40)

Purpose Use this procedure to hire a former state employee who was not converted into HRMS.

Trigger Perform this procedure when an employee is to be hired into state employment and they previously worked for the state, but are not currently active in HRMS.

Prerequisites

- The employee already has an assigned personnel number from the Data Warehouse.
- Contact the DES Service Center (360.664.6400) or ServiceCenter@dop.wa.gov to get the employee's personnel ID number out of the Data Warehouse.
- An employee must have been hired into State service and completed a New Hire Information Packet.

End User Roles In order to perform this transaction you must be assigned the following role: Personnel Administration Processor, Payroll Processor, and Benefits Processor

Change History	
Date	**Change Description**
12/26/2012	Procedure updated to match current system.
10/03/2013	Removed note of *Personal Data (0002)* defaulting to date of birth.

Menu Path Human Resources Personnel Management Administration HR Master Data Personnel Actions

Transaction Code PA40

Helpful Hints

- Personal Holiday quotas are only created by the system at the beginning of a year. Employees who are hired after the beginning of the year and are entitled to a Personal Holiday will need to have their quota entered manually. See the OLQR procedure Quota Generate Accruals Manually.
- This procedure may require hand-offs to other roles (payroll processor and/or benefits processor) depending on the structure of your agency and your role at your agency.
- It is critical if a hand-off is made to another role, that the transaction code **PA40** is used and the

process is used. This is explained further in this process. Using **PA40** will ensure that all required infotypes are completed.
- Do **not** use the Transaction code **PA30** to complete portions of the new hire action.

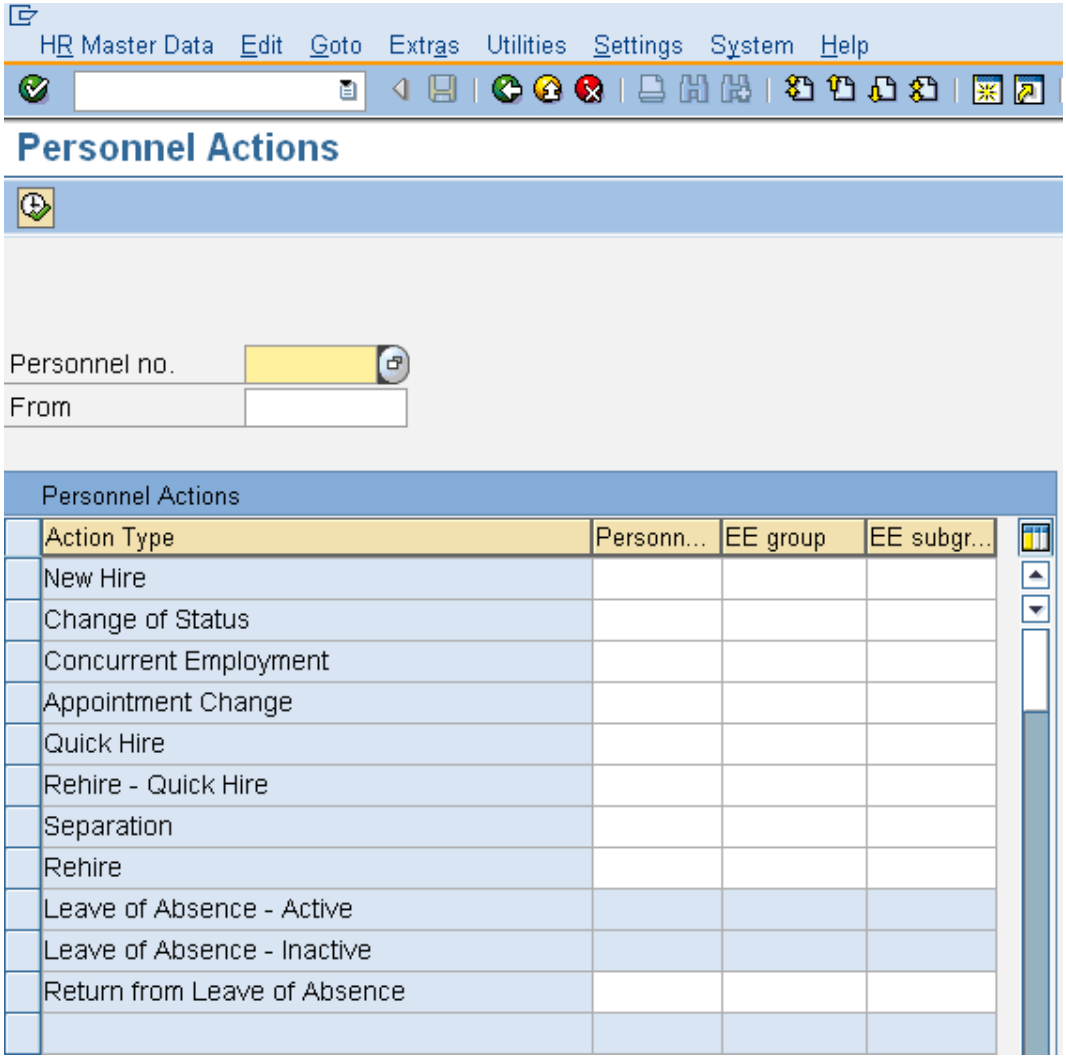
State of Washington

The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
Error	**Example**: Make an entry in all required fields. **Action**: Fix the problem(s) and then click (Enter) to validate and proceed.
Warning	**Example**: Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. **Action**: If an action is required, perform the action. Otherwise, click (Enter) to validate and proceed.
Confirmation or	**Example**: Save your entries. **Action**: Perform the required action to proceed.

Procedure

1. Start the transaction using the above menu path or transaction code **PA40**.



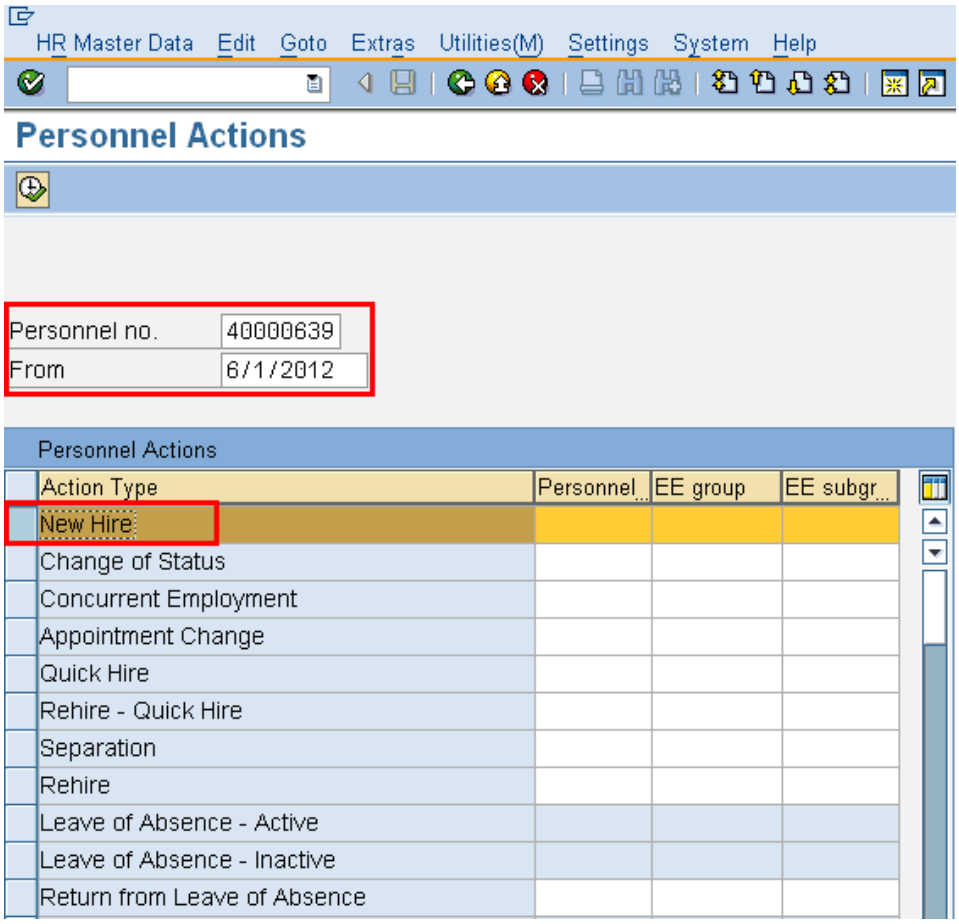
2. Perform the following fields:

If	Go To
You are the ***Personnel Administration Processor***	Step 3
You are the ***Payroll Processor***	Step 55
You are the ***Benefits Processor***	Step 76

3. Perform one of the following:

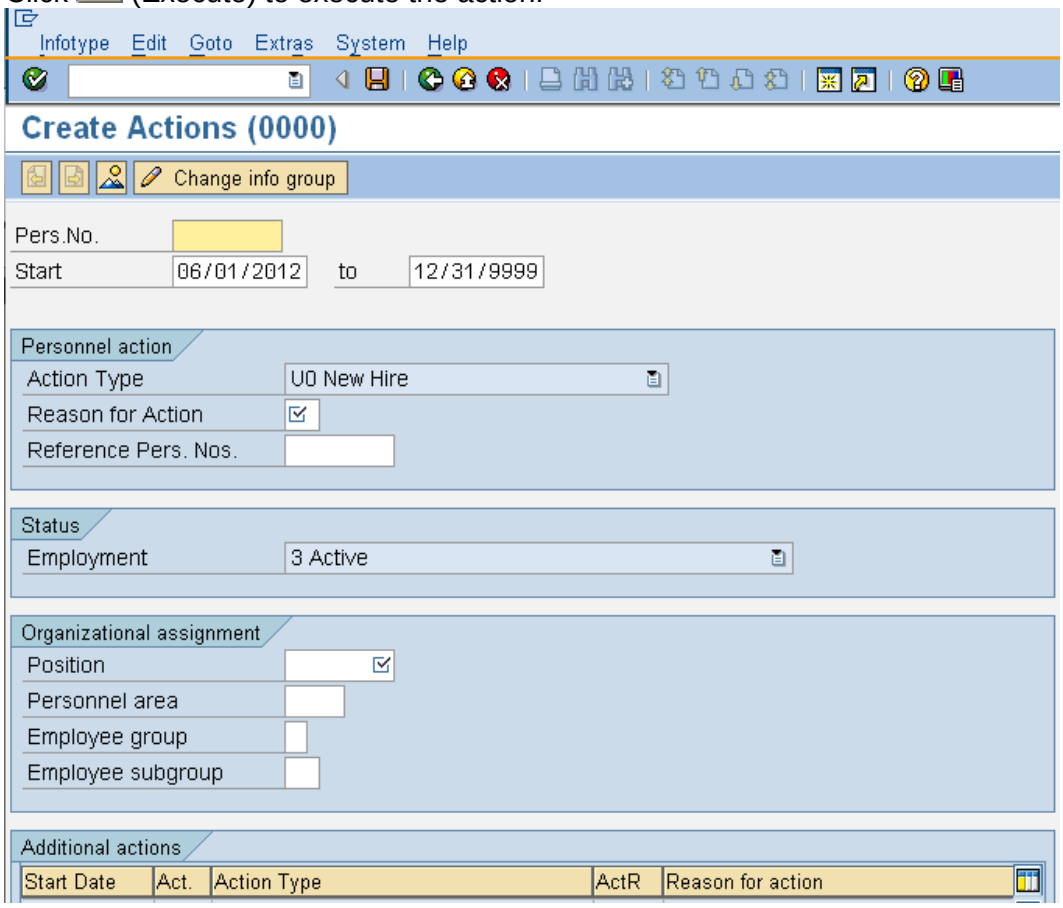
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	**R/O/C**	**Description**
From	R	The effective date of the new hire appointment. Only enter the ***From Date*** if you are the **Personnel Processor** initiating the new hire action. **Example:** 6/1/2012
Personnel Number	R	An employee's unique identifying number. Enter the assigned Data Warehouse number here. This will prevent the system from generating a new personnel number. **Example:** 40000639

4. Click the box to the left of New Hire to select.



5. Click (Enter) to validate the information.

6. Click (Execute) to execute the action.



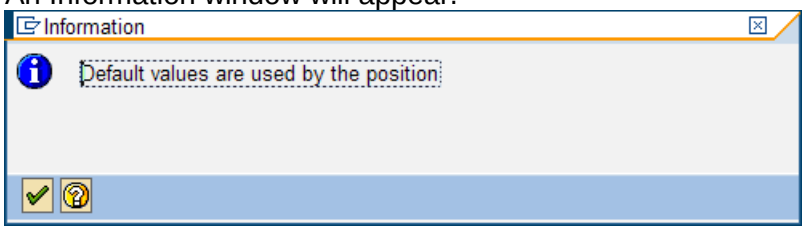
7. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Reason for Action	R	It stores the reason that an action has been performed. Click the (Matchcode) to open the selection list. **Example**: 02 Probationary
Position	R	This is a specific and concrete description of the responsibilities that one individual fulfills in an organization.

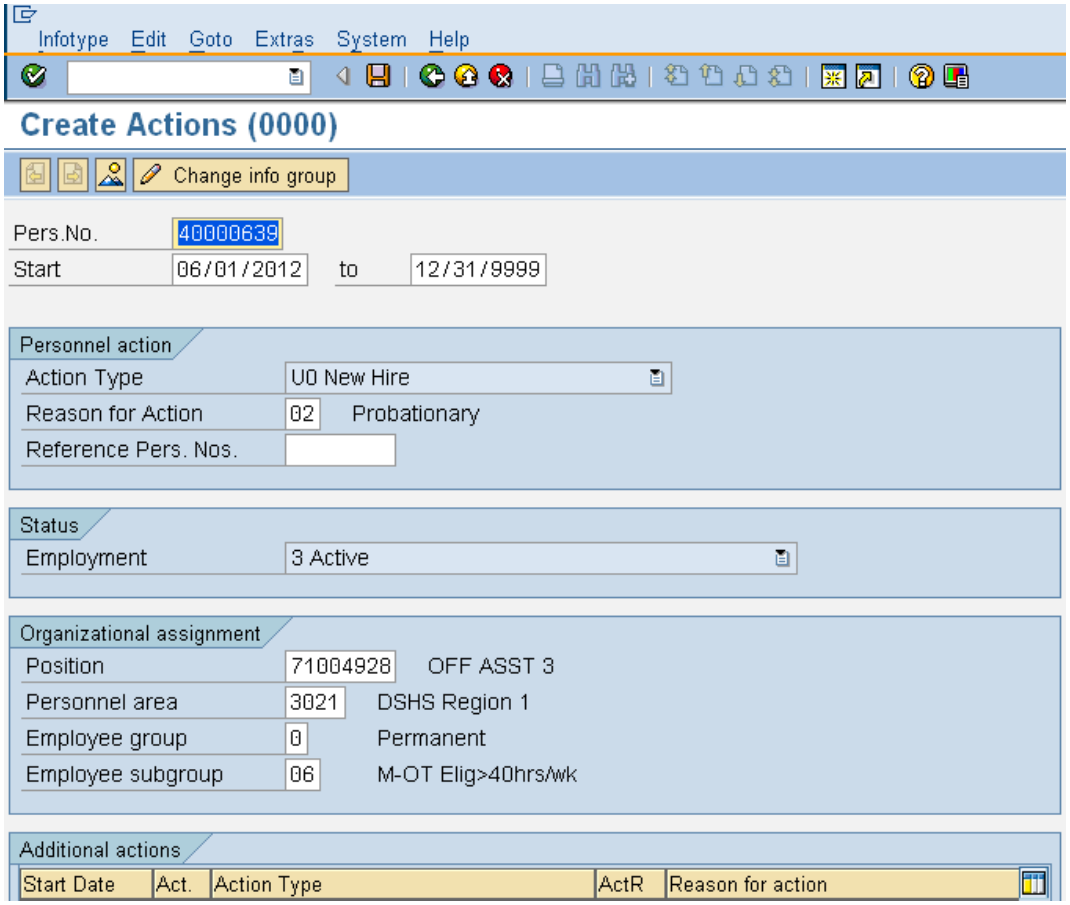
		Example: 71004928

8. Click (Enter) to validate the information.

9. An Information window will appear.



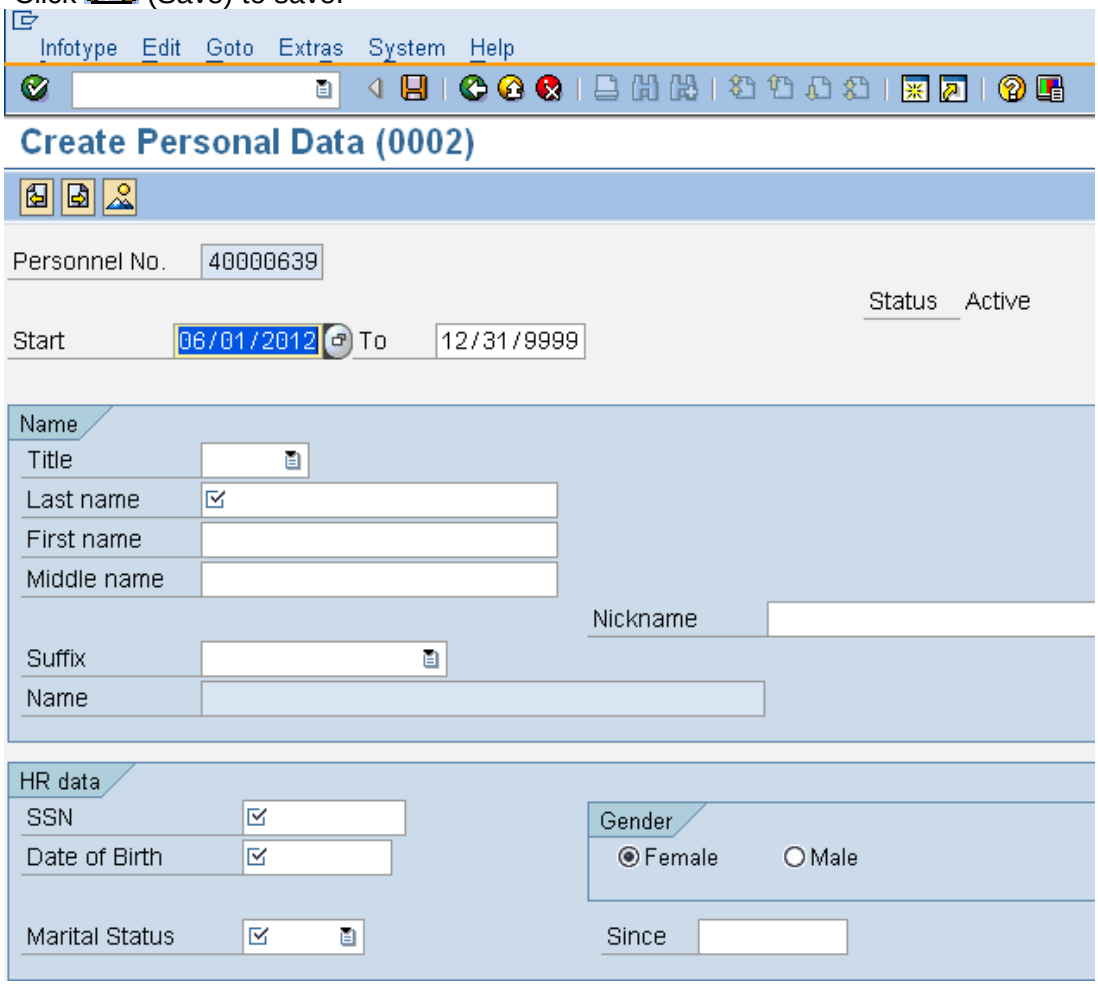
10. Click (Continue) to continue.



The employee's personnel number will now be generated.

State of Washington

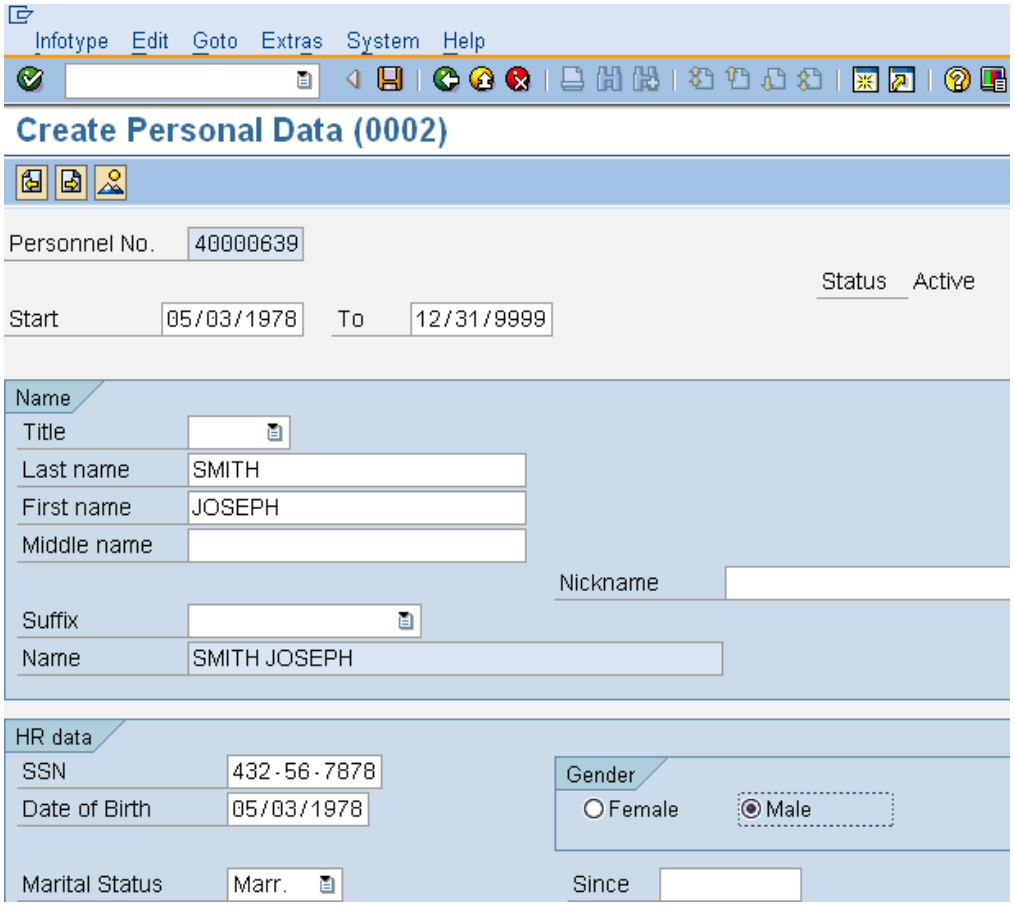
11. Click (Save) to save.



12. Complete the following fields:

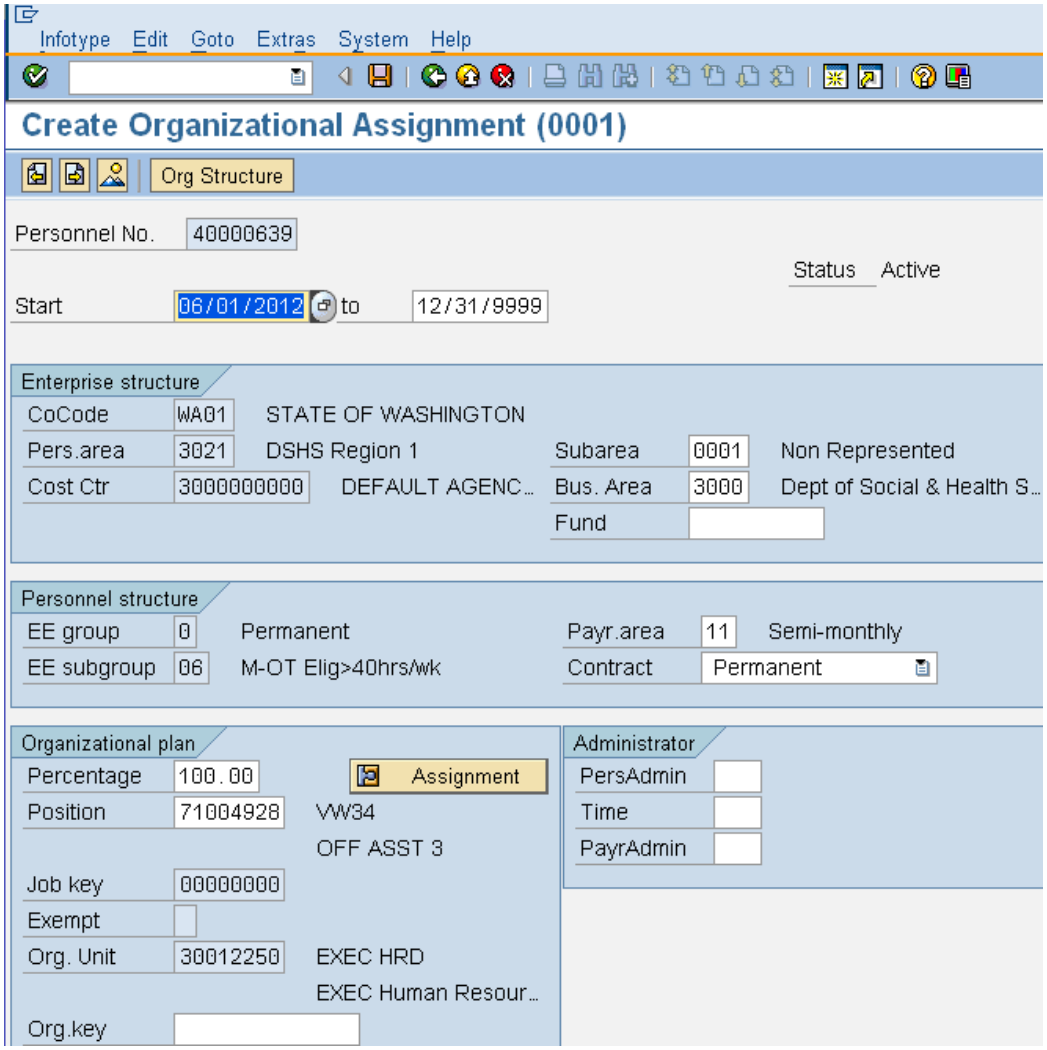
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Last Name	R	The legal last name of an employee as indicated on their social security card. **Example:** Smith
First Name	O	The legal first name of an employee as indicated on their social security card. **Example:** Joseph
SSN	R	The 9 digit number assigned by the Social Security Administration.

		Example: 432-56-7878
Date of Birth	R	The date of the employee's birth. **Example:** 05/03/1978
Gender	R	Enter the gender of the employee. **Example:** Male
Marital Status	R	The marital status of the employee. **Example:** Married



13. Click (Enter) to validate the information.

14. Click (Save) to save.

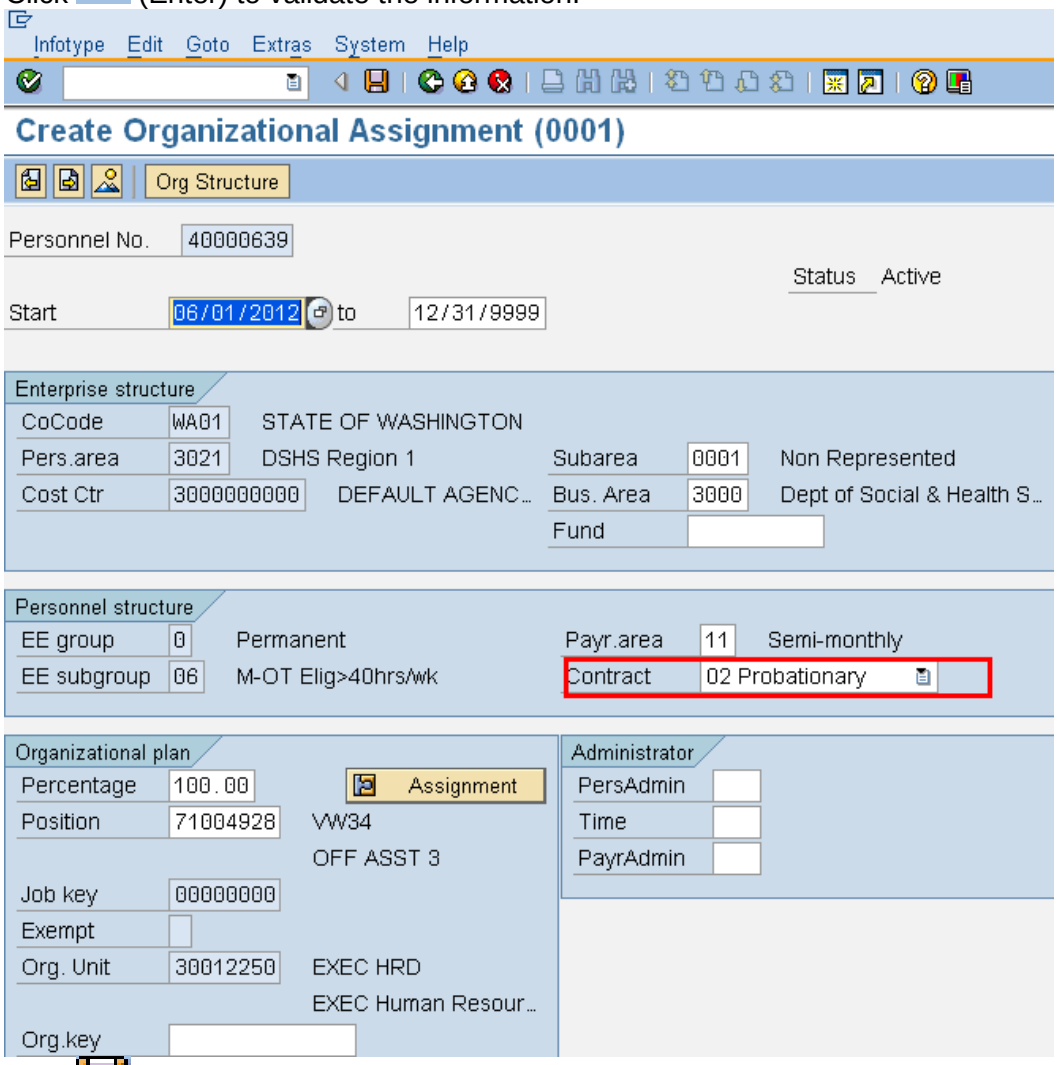


15. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Contract	R	The status of the appointment. Click (Dopdown) to view the selection list. **Example**: Probationary.
Org. Key	O	The pay distribution location. This field is used at the discretion of the agency.

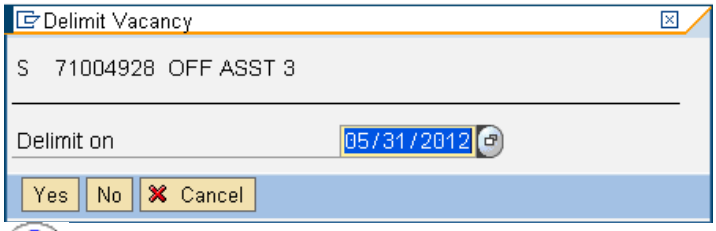
		Example: 4000
Time	O	The time data administrator is responsible for the employees assigned to him or her. This field is used at the discretion of the agency. **Example:** DA

16. Click (Enter) to validate the information.



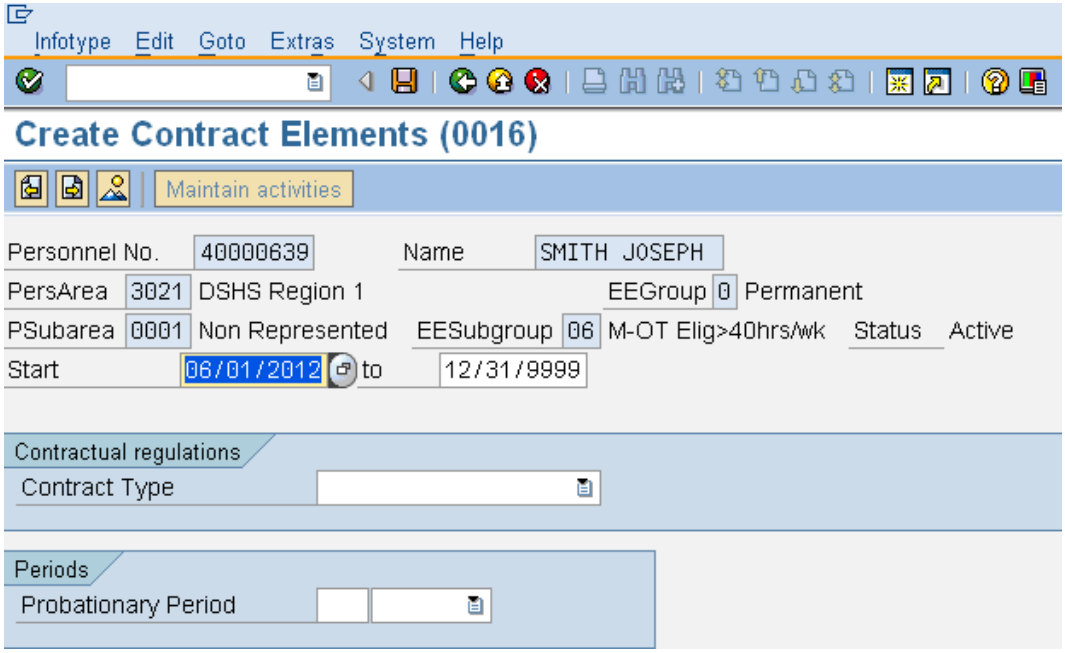
17. Click (Save) to save.

18. If the Delimit Vacancy appears, select the appropriate option for your agency's position.



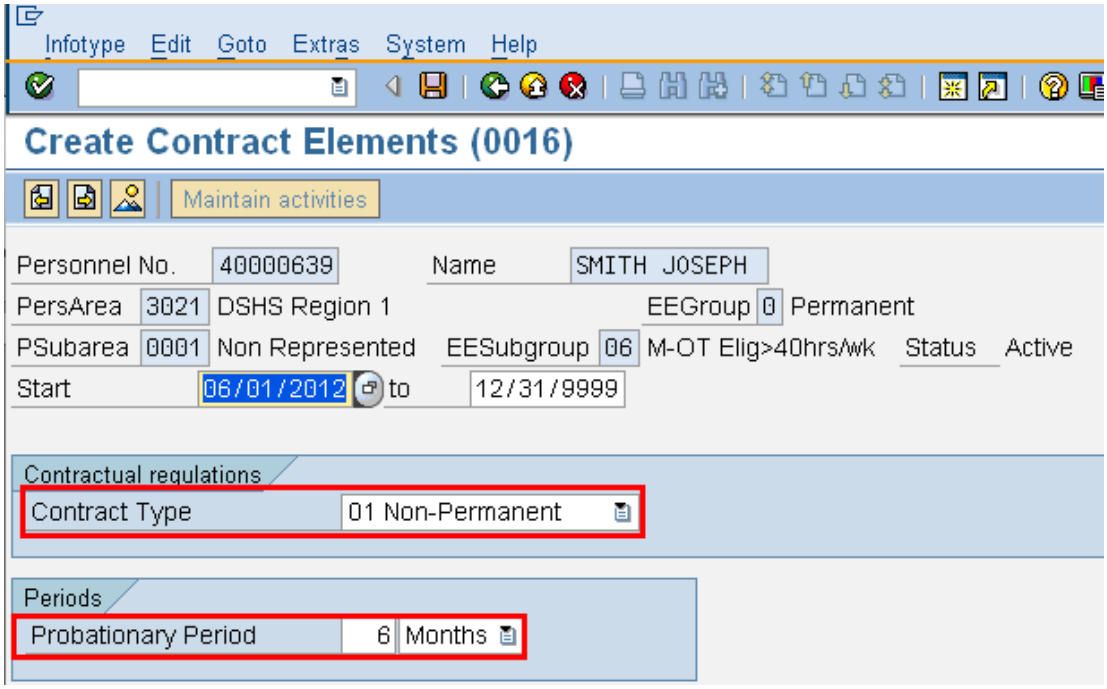
This screen will only appear if there is a vacancy that will be delimited by the new hire.

19. Click Yes to delimit the Vacancy.



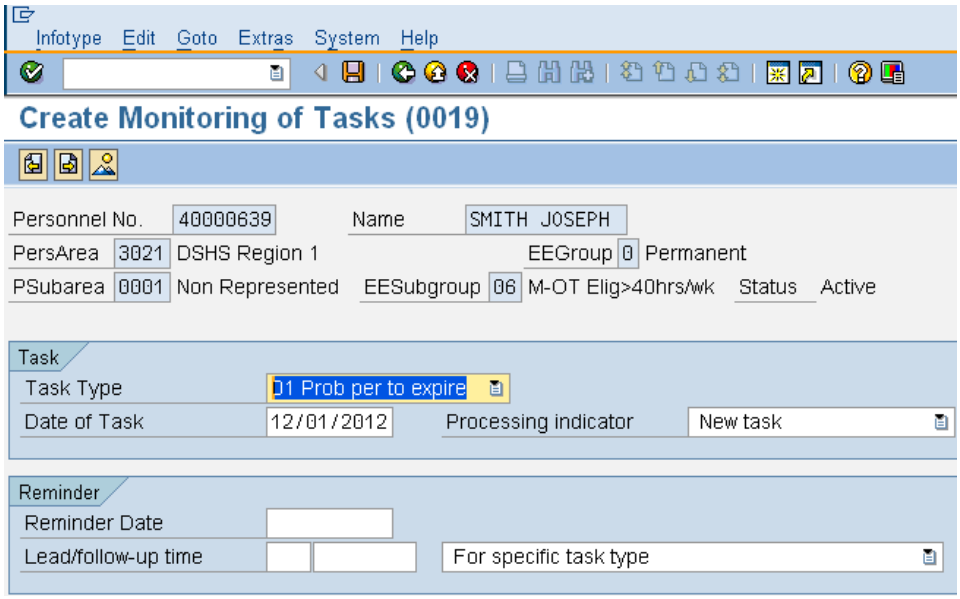
20. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Contract Type	R	The status of employment within the State. **Example:** Non-Permanent
Probationary Period	O	The length of the employee's probationary period. **Example:** 6 Months



21. Click (Enter) to validate the information.

22. Click (Save) to save.

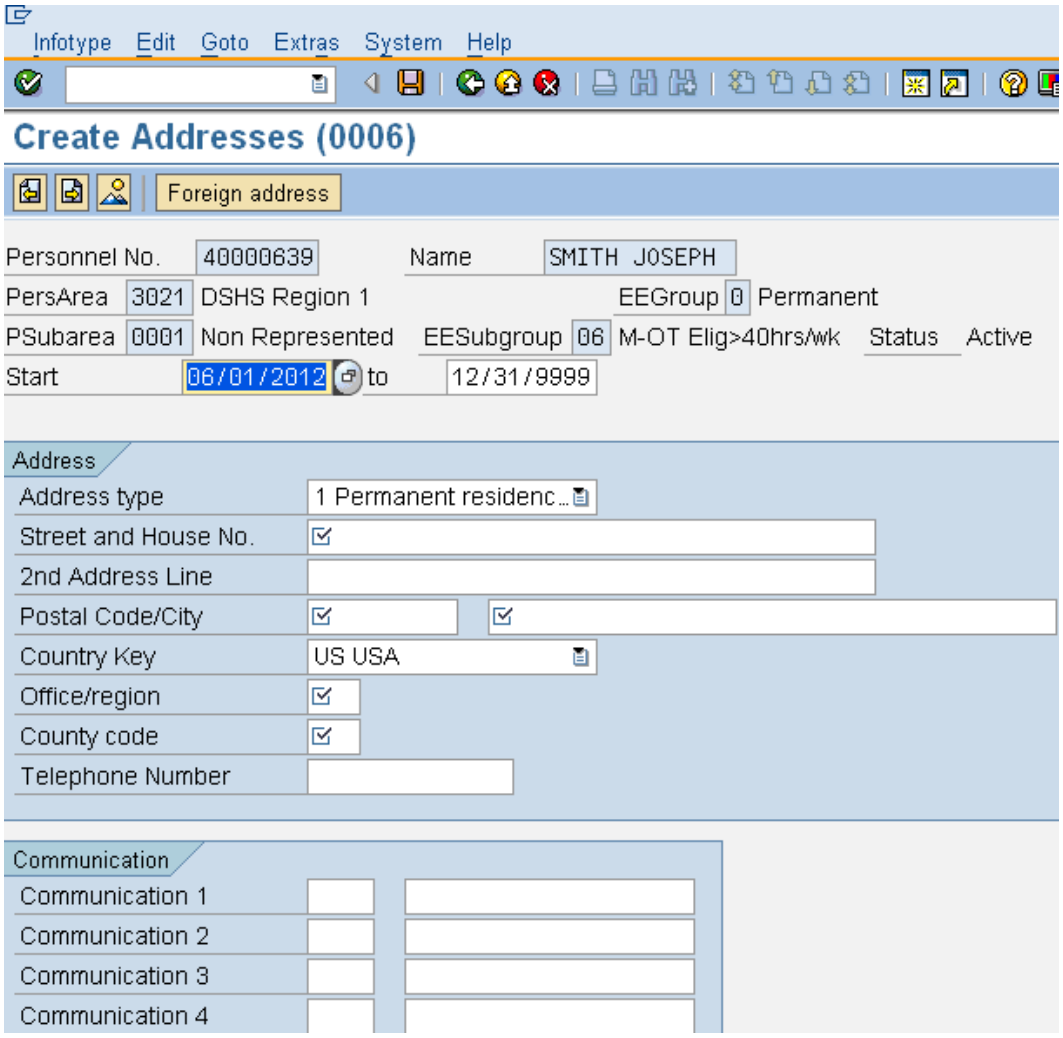


23. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/ C	Description
Reminder Date	O	This is the date on which the system will remind a user (via report) that a specific period is expiring or a record needs to be updated. **Example**: 11/21/2012
Lead/follow-up time	O	This is the amount of time to be notified in advance or after an event has occurred. When the infotype is validated, this field will be converted into the *Reminder Date* field based on the *Date of Task*. **Example:** 1 Weeks

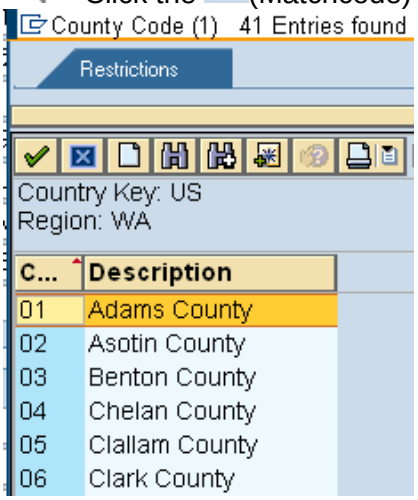
You can run the **Task Monitoring Report** (S_PH0_48000450**)** to get the reminder dates and tasks.

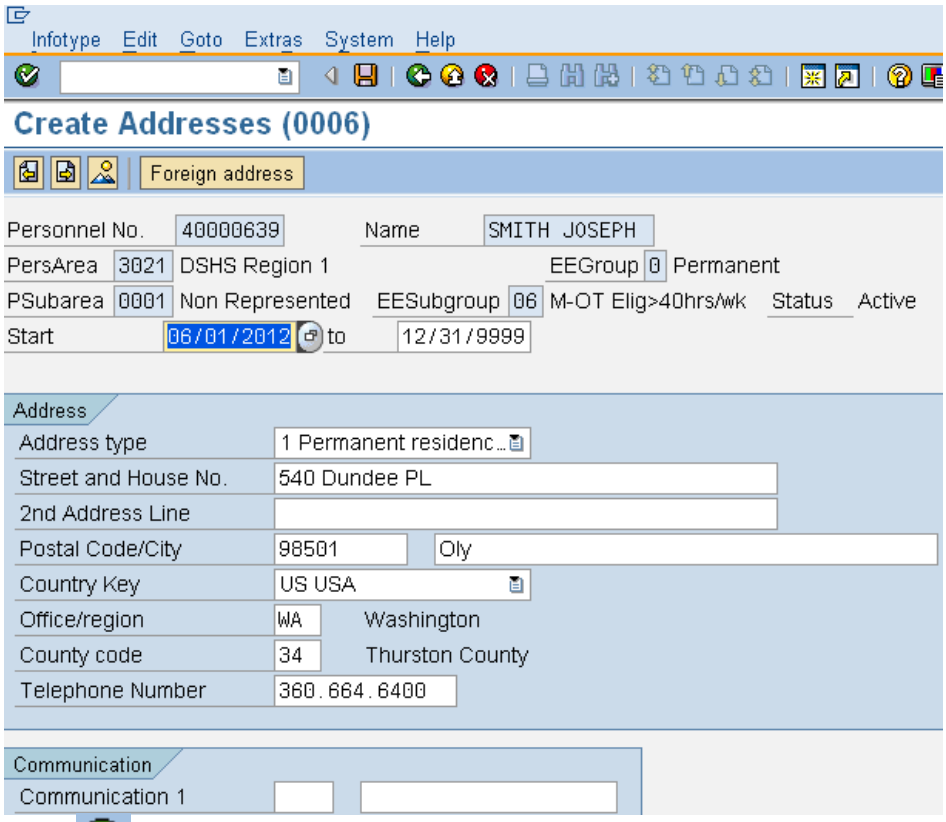
24. Click (Enter) to validate the information.
25. Click (Save) to save.



26. Complete the following fields:

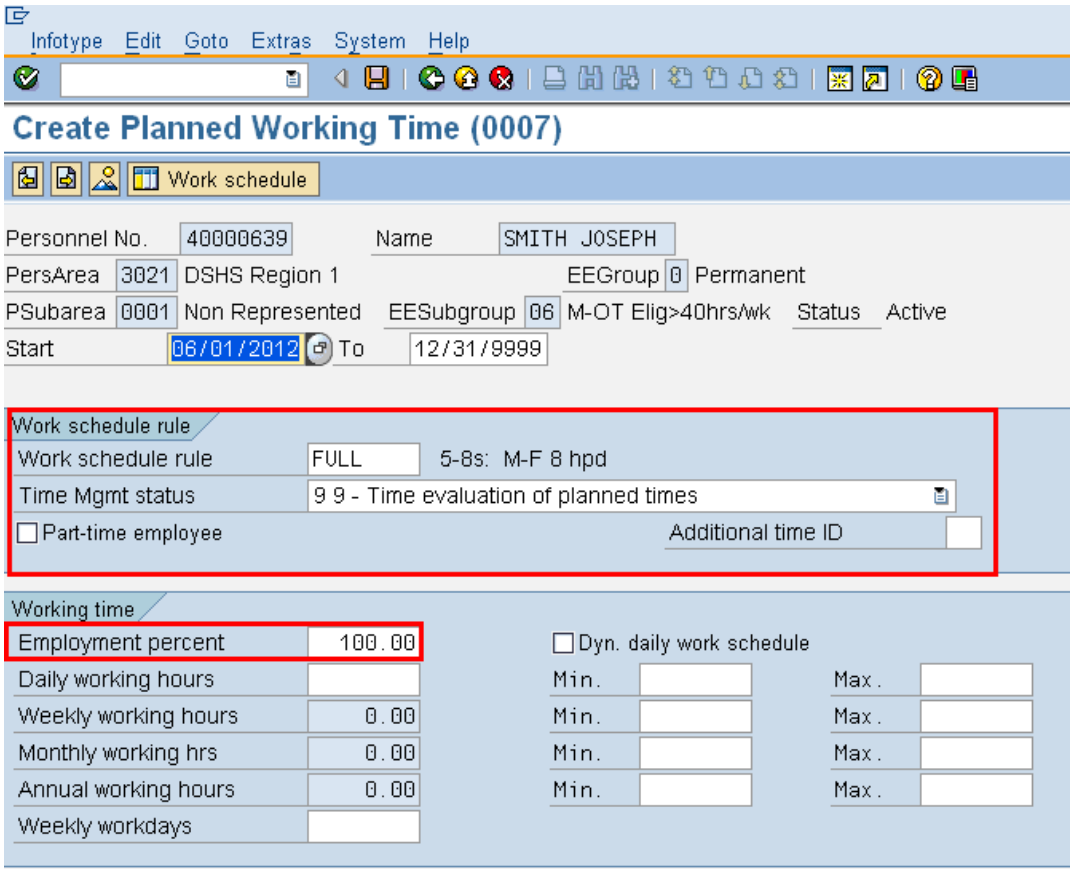
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Address Type	R	The type of address for this infotype. You can also select mailing address from the drop down list. If the employee provides a permanent residence and mailing address you can only complete one type during the New Hire Action. To enter another address type follow the procedure Addresses_Create and Maintain that is located in the OLQR.

		Example: Permanent Residence.
Street/House NO.	R	The residential street address of an employee. **Example:** 540 Dundee PL
Postal Code/City	R	The 5 or 9 digit zip code and city the employee resides in. **Example:** 98501/Olympia
Country Key	R	The country the employee resides in. This field will default to USA. **Example:** USA
Office/region	R	The state in which the employee resides. **Example:** WA
County Code	R	The numeric code for the county in which the employee resides. Click the (Matchcode) to display options.  **Example:** 34 – Thurston County
Telephone Number	O	The telephone number for an employee. **Example:** Home- 360.664.6400



27. Click (Enter) to validate the information.

28. Click (Save) to save.

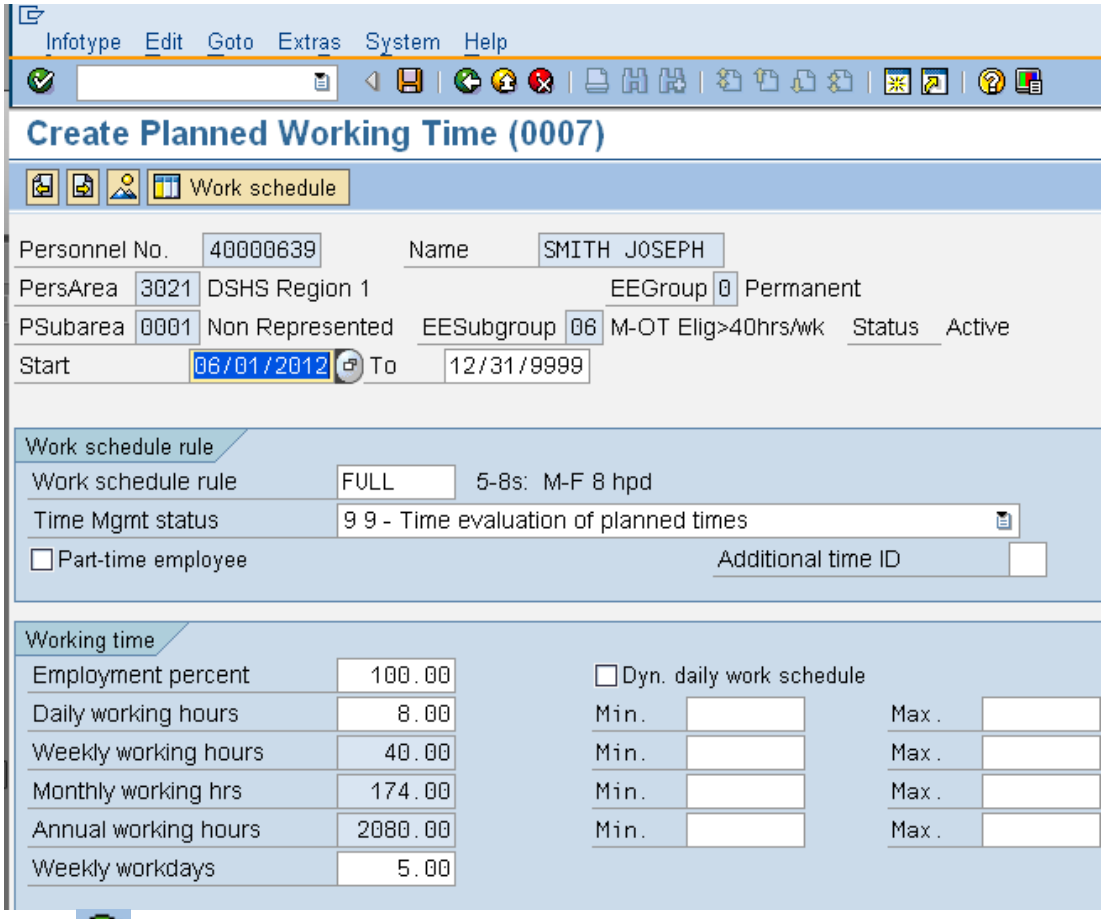


29. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/ C	Description
Work schedule rule	R	A description of the duration and composition of employee working time for any given workday. **Example**: FULL
Time Mgmt status	R	This is part of the work schedule that an employee is assigned to and signifies how hours are calculated based on the employee's assigned work schedule. 1-Time Evaluation of actual times - Use for Hourly employees 9-Time Evaluation of planned times - Use for Monthly employees **Example:** 9- Time evaluation of planned times
Additional time ID	R	The indicator on how employee leave will accrue Enter:

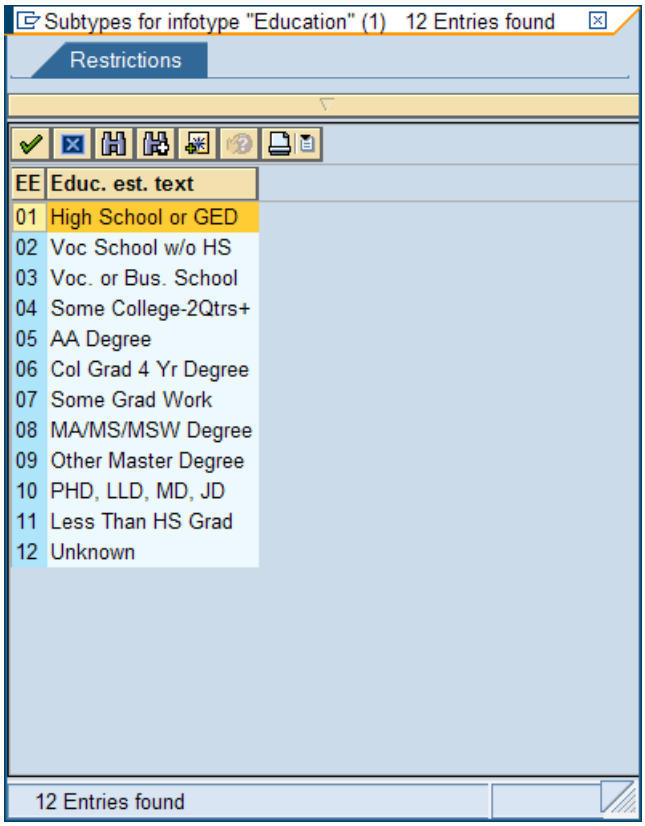
		▪ 00 for full normal leave accrual (will default if to normal if field is left blank). ▪ 01 for NO leave accrual ▪ 02 for sick leave accrual only

Employment percent	R	The amount of time that an employee works per week in a particular position and is described in terms of a percentage. **Example:** 100.00



30. Click (Enter) to validate the information.

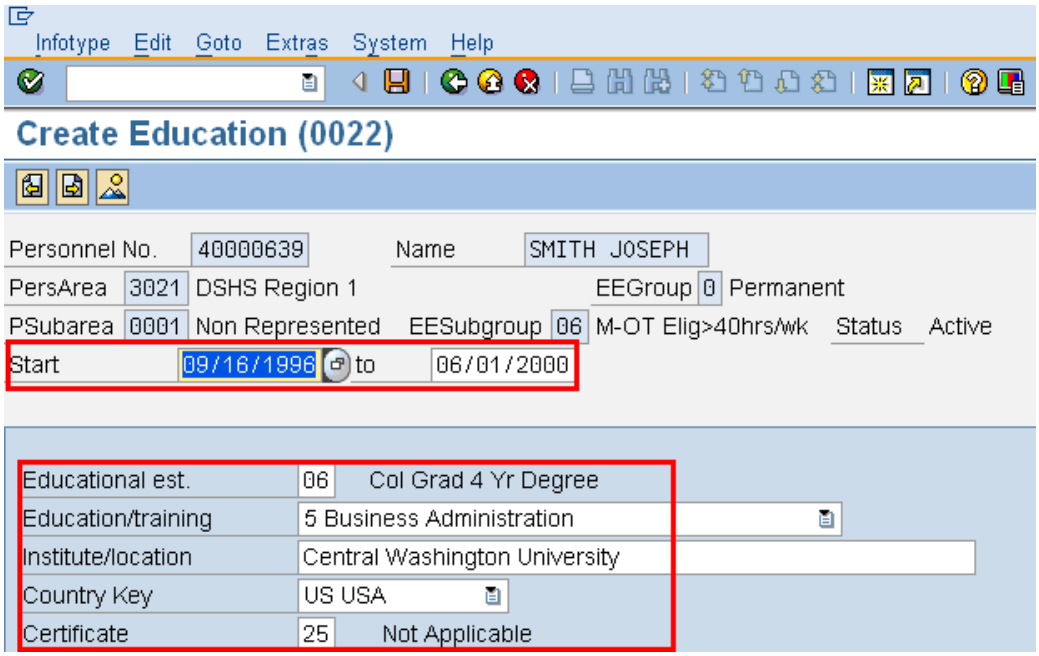
31. Click (Save) to save.



32. Click on the appropriate education level.

This infotype can be skipped by clicking (Close) to close the window.

33. Click (Copy) to accept.

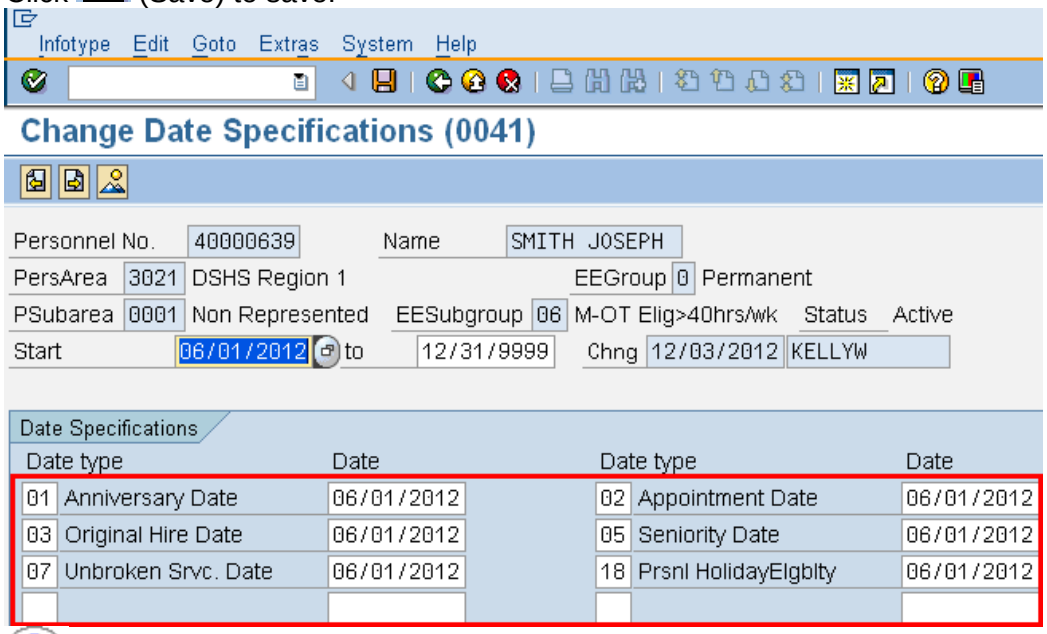


34. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Start	R	This is the date on which a record begins. **Example**: 09/16/1996
To	R	It specifies the end date of a record, transaction, or search. **Example**: 6/1/2000
Education / training	R	This is the type of education and/or training the employee/applicant has acquired at a given educational institution. **Example**: 5- Business Administration
Institute / location	R	This is the name of educational institution attended. **Example:** Central Washington University
Certificate	R	This is the type of leaving certificate (e.g. high school diploma, University degree) the employee or applicant has acquired at a given Institution. **Example:** 25 Not Applicable

35. Click (Enter) to validate the information.

36. Click (Save) to save.

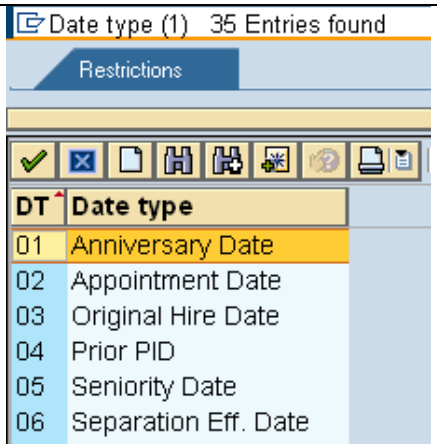


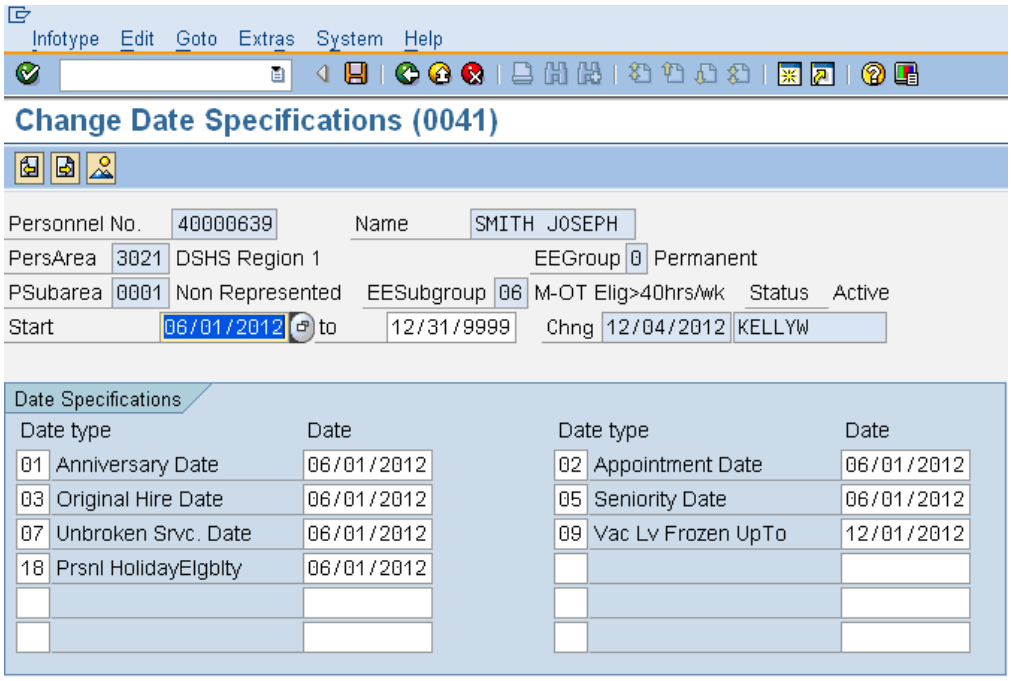
The *Prsnl Holiday/Elgblty* (Personal Holiday Eligibility-Date type 18) is the date an employee is eligible to take a personal holiday.
The *Prsnl Holiday/Elgblty* will default to the new hire date. If the employee is not eligible to take a personnel holiday when they start employment, you will need to change the date to when they are eligible.
In HRMS, there are a limited number of date types to enter into Date Specifications. You are limited to 12 date types for each record.

37. If you would like to indicate the date the employee will be eligible to take vacation leave (annual leave), complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Date type	O	Defines the meaning of a particular date. Place cursor in the first available date type field and click on the (Matchcode) to display all date types.

State of Washington

		 **Example**: 09 (Vac Lv Frozen Up To)
Date	R	This is either the current date or a date that must be entered into the system to store a record. **Example**: 01/01/2020



38. Click (Enter) to validate the information.

39. Click (Save) to save.

Infotype Edit Goto Extras System Help

Create Additional Personal Data (0077)

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 To 12/31/9999

Additional Personal Data

Ethnic origin

Ethnicity(New)

Race Data

	Race Category
☐	American Indian/Alaskan Native
☐	Asian
☐	Black or African American
☐	Native Hawaiian or Other Pac Islander
☐	White

Military status

☐ Exempt from EEO

Veteran Status

Discharge Date

☐ Special disabled veteran

☐ Vietnam-era veteran

☐ Other Protected Veteran

☐ Recently separated veteran

☐ Armed Forces Service Medal Veteran

☐ Disabled Veteran

☐ Non-veteran

Disability

☐ Disability

Disability Date

Date Learned

State of Washington

40. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	**R/O/ C**	**Description**
Ethnic origin	O	The employee's ethnic group. **Example:** Black/Not Hispanic orgin
Ethnicity (New)	O	The EEO coded field allows you to group employees by ethnic origin. **Example:** Not Hispanic/Latino
Military Status	O	The branch of service the employee served/serves in. If the employee has **not** served in the military you can select **Non/Unspec Vet's Status** or leave the field **blank.** **Example:** Rtrd VtnmVT> 500

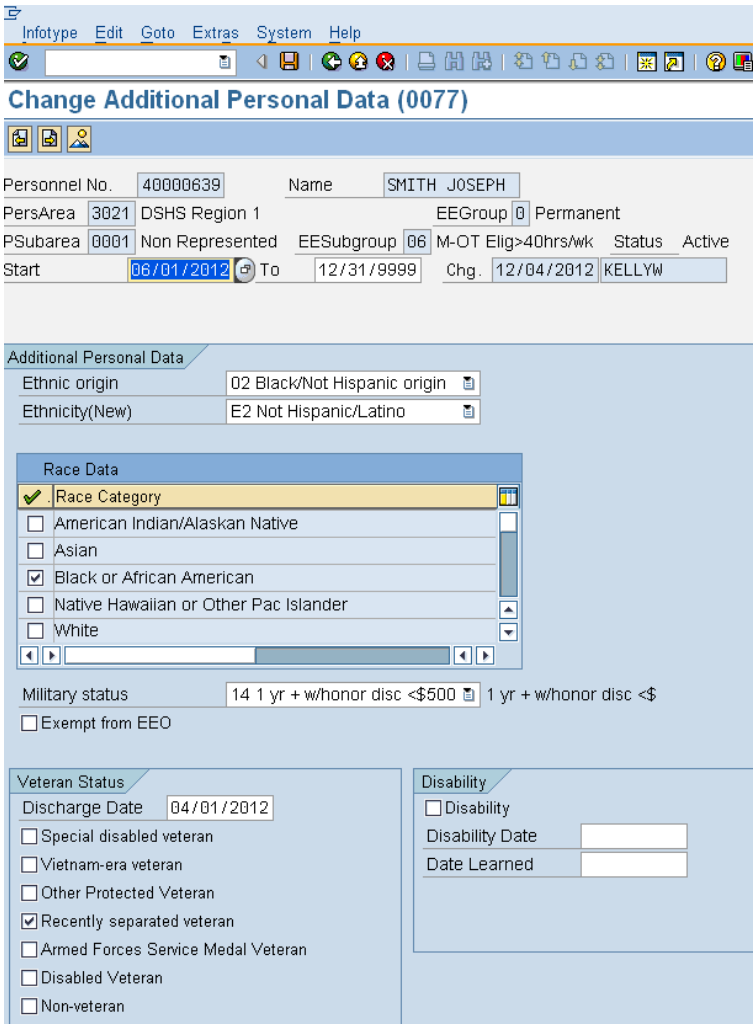
41. In the **Race Data** Group, click the checkbox to the left of the appropriate **Race** Category to select.

42. If applicable, choose a **Veteran Status.**

Non-Veteran is the default **Veteran Status**, if you select another **Veteran Status,** then you must **uncheck** the Non-Veteran Status.

43. If applicable, choose a **Disability.**

44. Click (Enter) to validate the information.



45.

Click (Save) to save.

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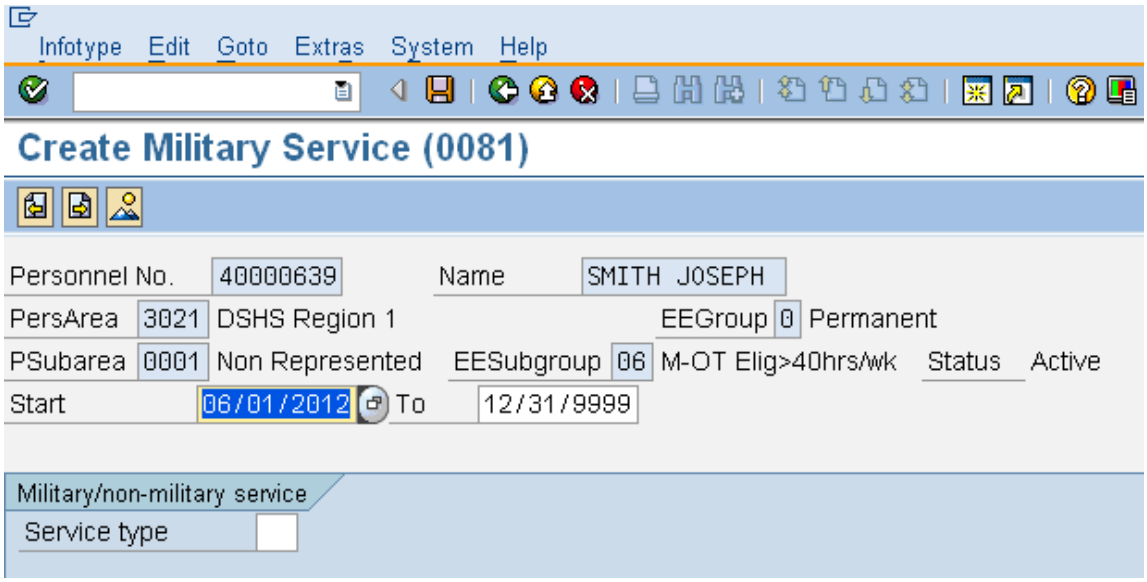
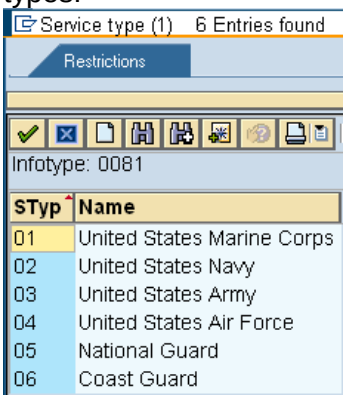
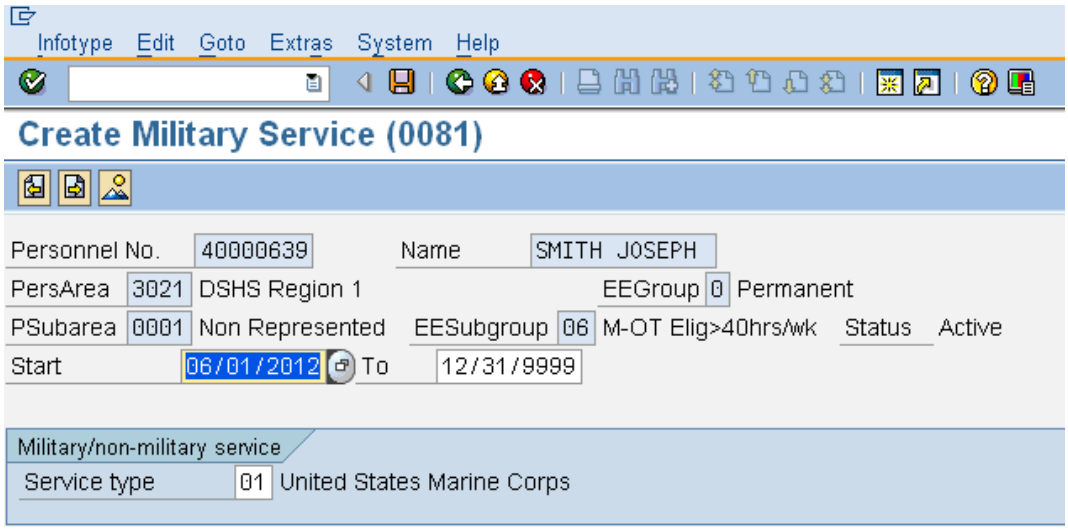


46. This infotype will only appear if a Military Status was chosen on the *Additional Personal Data Infotype.*

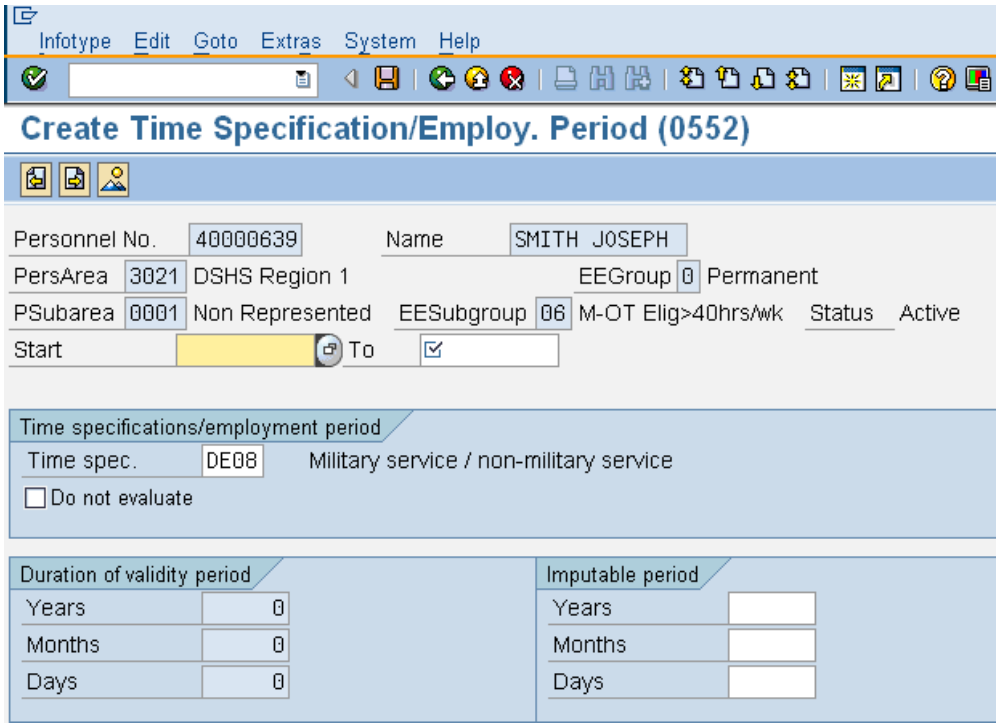
Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Service Type	R	This defines what type of service. Click on the (Matchcode) to display all service types.  **Example:** 01- United States Marine Corps



47. Click (Enter) to validate the information.

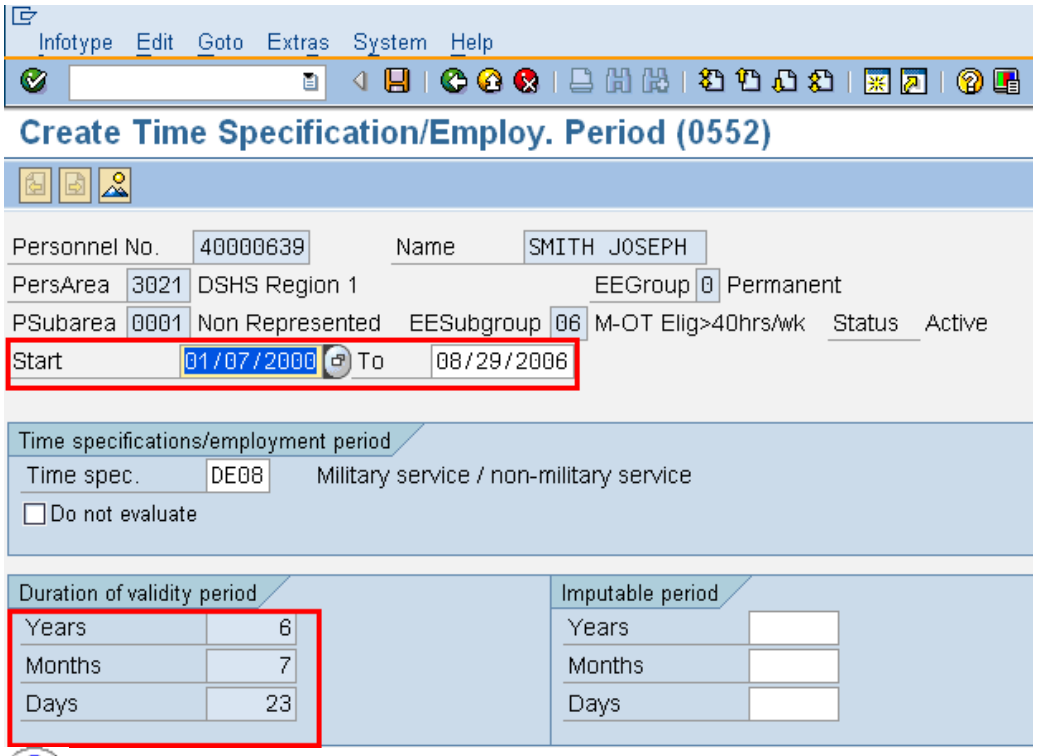
48. Click (Save) to save.



49. Complete the following fields:

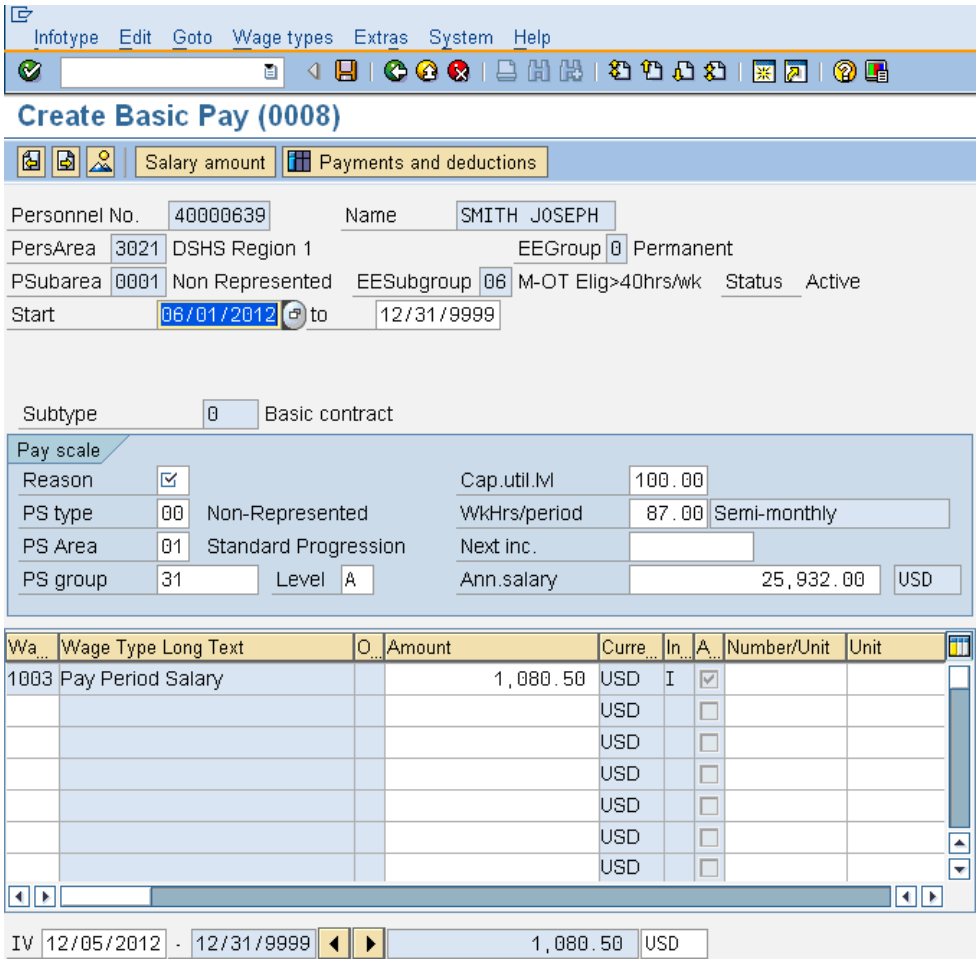
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	**R/O/C**	**Description**
Start	R	The start date of the employee's Military Service This should match what is on the employee's DD214 paperwork. **Example:** 1/7/2000
To	R	The end date of the employee's Military Service This should match what is on the employee's DD214 paperwork. **Example:** 8/29/2006

50. Click (Enter) to validate the information.



The fields under ***Duration of validity period*** will automatically calculate based upon dates entered in the *Start and To* fields when you press (Enter).

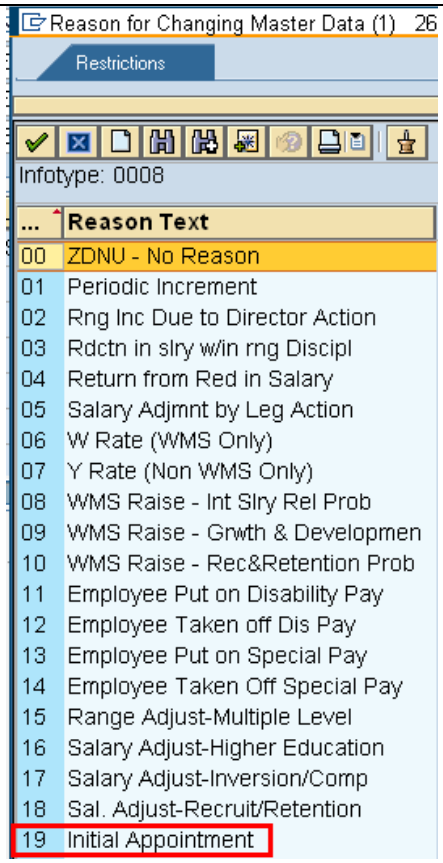
51. Click (Save) to save.

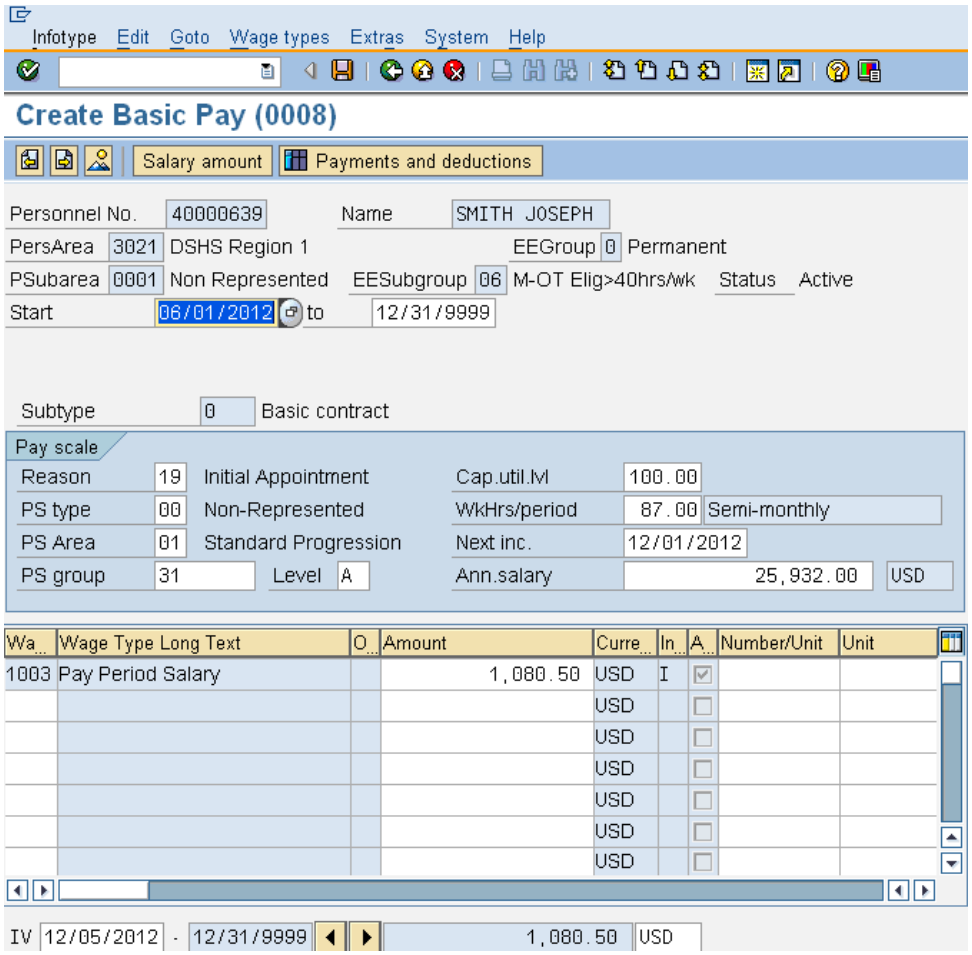


52. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	**R/O/C**	**Description**
Reason	**R**	This is a specific reason for performing an action or maintaining an infotype. Click on the (matchcode) to display all entries.

State of Washington

		 **Example:** 19- Initial Appointment
Next Increase	**O**	The date of the employee's next pay increase. If you leave this field blank, the employee **will not** receive a pay increase. **Example:** 12/1/2012



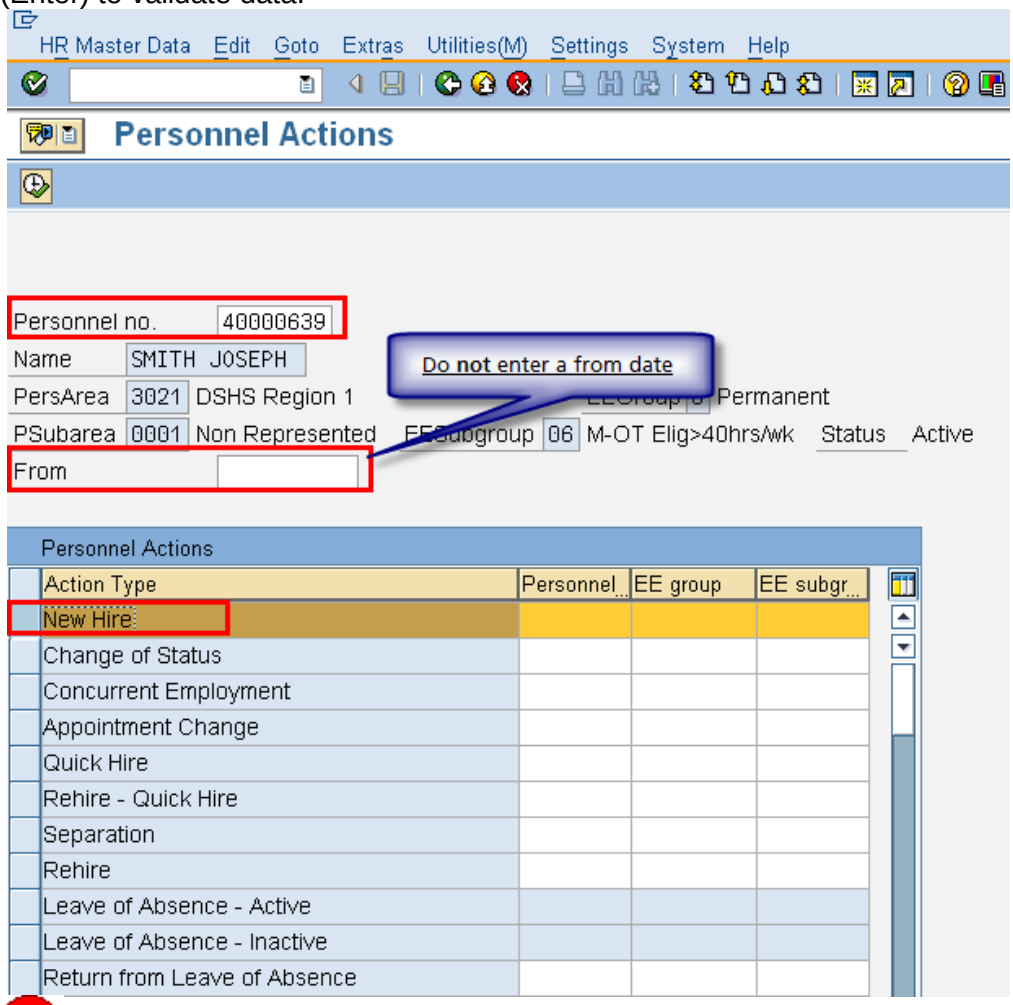
53. Click (Enter) to validate information.

54. Click (Save) to save data.

For the ***Personnel Administration Processor***, this will mark the end of the New Hire action. After saving, click to exit the action and transfer the New Hire Information Packet to the ***Payroll Processor*** who will continue the action.

55. Start the transaction using the above menu path or transaction code **PA40.** Enter the

employee's Personnel Number into the ***Personnel Number Field*** and press (Enter) to validate data.



Payroll Processor –Do not put a "From" date in the field prior to executing the transaction.

56. Click (Execute) to begin the transaction.

State of Washington

Infotype Edit Goto Extras System Help

Change Actions (0000)

Execute info group | Change info group

Pers.No.	40000639						
Name	SMITH JOSEPH						
PersArea	3021	DSHS Region 1		EEGroup	0	Permanent	
PSubarea	0001	Non Represented	EESubgroup	06	M-OT Elig>40hrs/wk	Status	Active
Start	06/01/2012	to	12/31/9999	Chng	12/03/2012	KELLYW	

Personnel action

Action Type	U0 New Hire
Reason for Action	02 Probationary

Status

Employment	3 Active

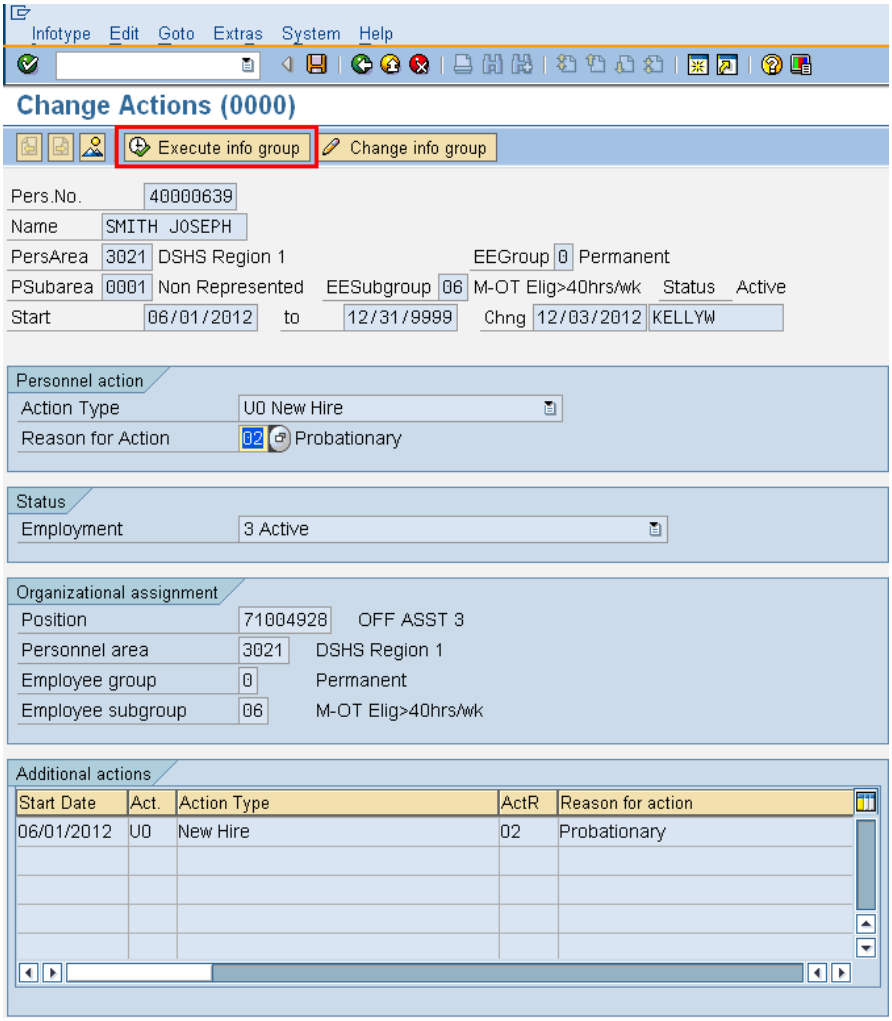
Organizational assignment

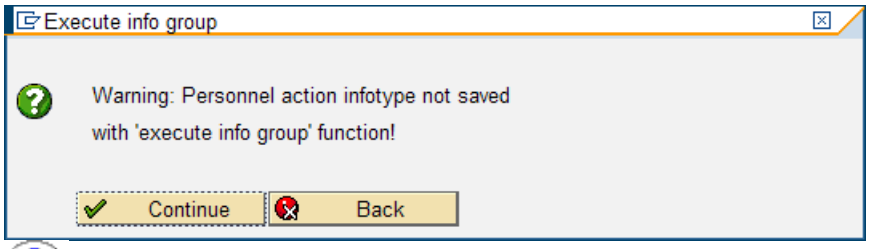
Position	71004928	OFF ASST 3
Personnel area	3021	DSHS Region 1
Employee group	0	Permanent
Employee subgroup	06	M-OT Elig>40hrs/wk

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action
06/01/2012	U0	New Hire	02	Probationary

57. Click Execute info group

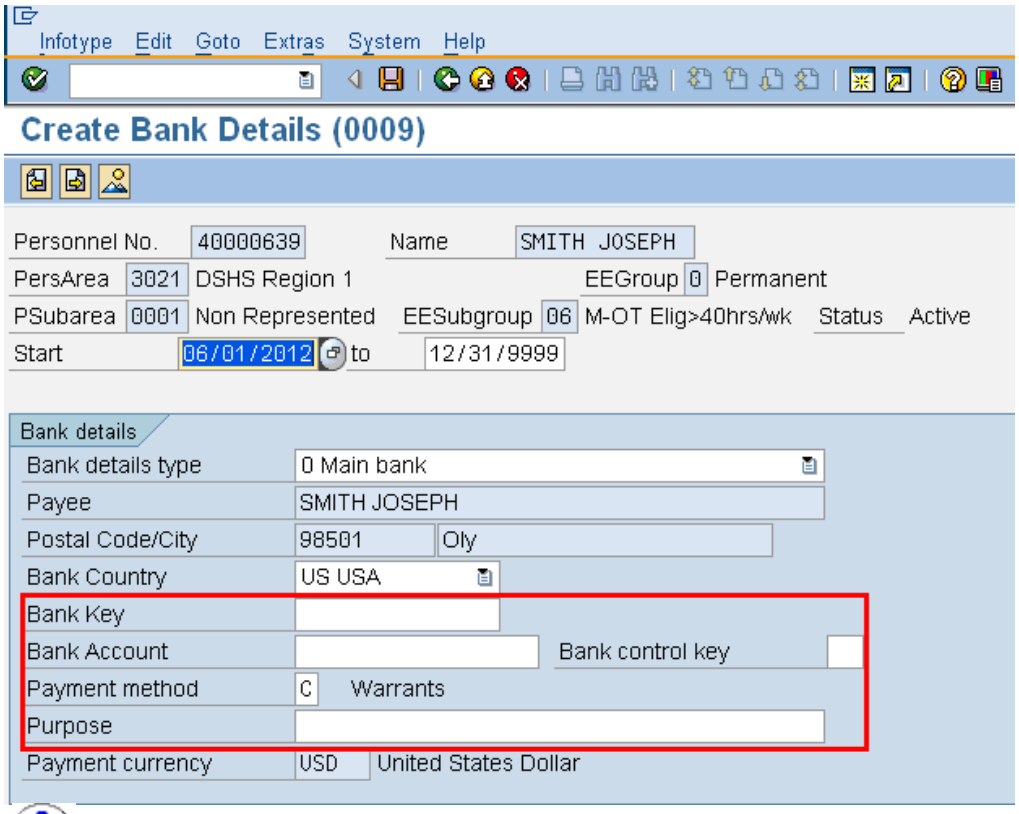




This infotype was already saved and it is okay to continue.

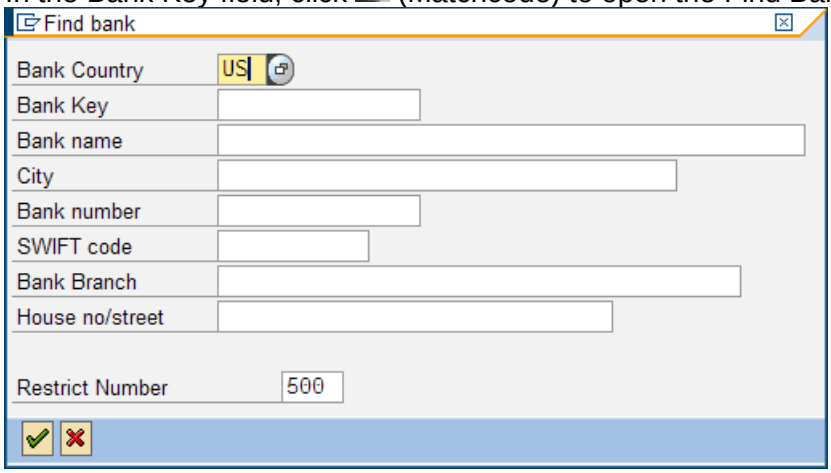
58. Click (Next Record) until you reach Subtypes for infotype Education, click (Close) to by-pass this infotype.

59. Continue to click (Next Record) until you reach Create Bank Details (0009).



If the employee has not turned in the direct deposit form, or would like to have receive a paper check, move to step **62**. If the employee has completed the direct deposit form identifying where they would like their pay check deposited, complete the following:

60. In the Bank Key field, click (Matchcode) to open the Find Bank window.



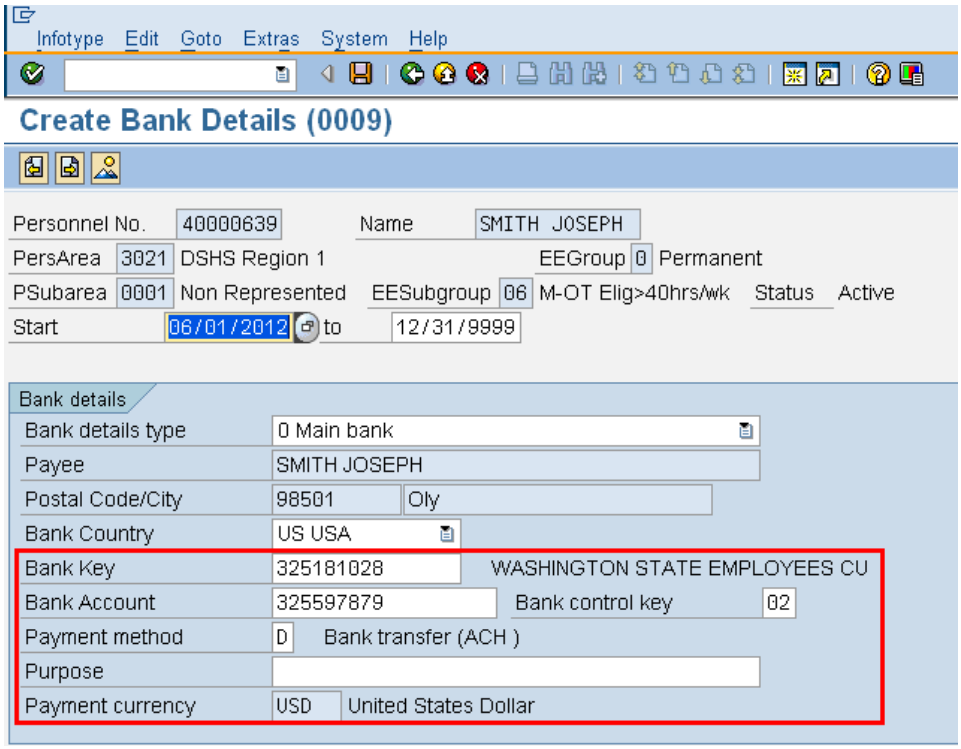
60.1	To search for a bank by name: in the Find bank window, in the Bank name field, type a portion of the bank name, followed by an asterisk (*) – for example, Washington*.

State of Washington

	To search by city, in the Find bank window, in the City field, type an asterisk (*), a portion of the city name, followed by another asterisk (*) – for example, *Olympia*.
60.2	Click (Continue) to accept and display a list of banks matching the criteria.
60.3	Click the appropriate bank.
60.4	Click (Copy) to accept.

61. Complete the following fields:

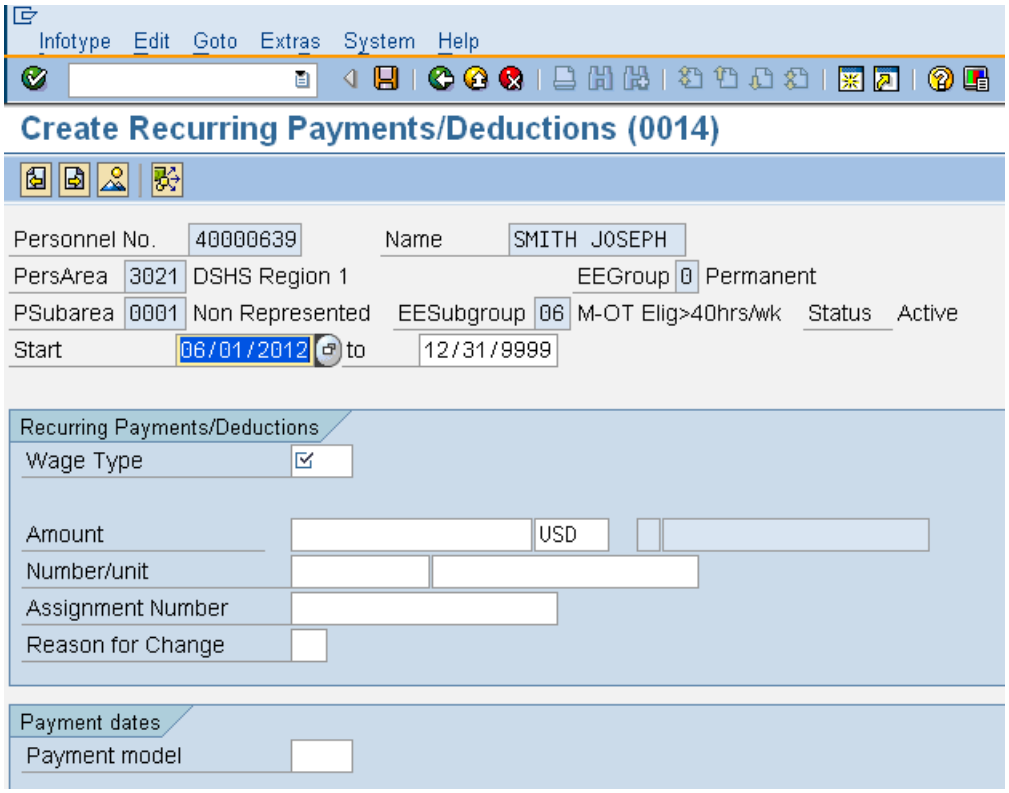
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Bank Account Number	O	The employee's bank account number. Leave blank for a Warrants payment method. **Example:** 325497879
Bank control key	O	The type of bank account - for example, savings or checking. Enter *01* for Checking or *02* for Savings. Do not leave this field blank **Example:** 02
Payment method	R	The manner in which an employee is compensated, either by warrant or direct deposit. **Example:** C = Warrant; D = Bank Transfer (ACH)



62. Click (Enter) to validate the information

You must save the Bank Details infotype to accept the default of warrant. If you do not save this infotype, the employee will **red line** on payroll reports and will not process through payroll until the *Bank Details* infotype is created and save.

63. Click (Save) to save.

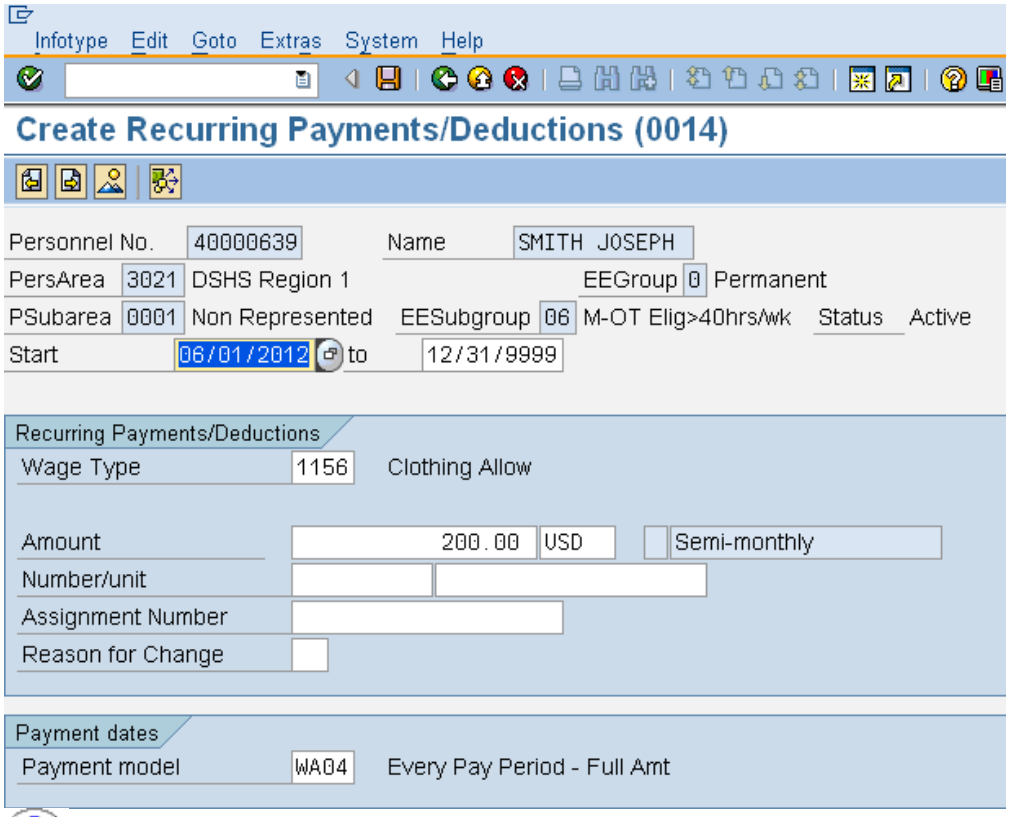


64. If the employee has Recurring Deductions, complete the following fields:

If no information has been provided for recurring payments or deductions, skip this infotype by clicking (Next record

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Wage type	R	Type of payment or deduction which stores amounts or time unites that are used to calculate pay and deductions. It separates amounts and time units for various business processes. Click (Matchcode) to open the selection list. **Example:** 1156- Clothing Allow
Amount	R	The amount of the payment/deduction. **Example:** 20
Payment	R	The payment schedule for the payment/deduction – the

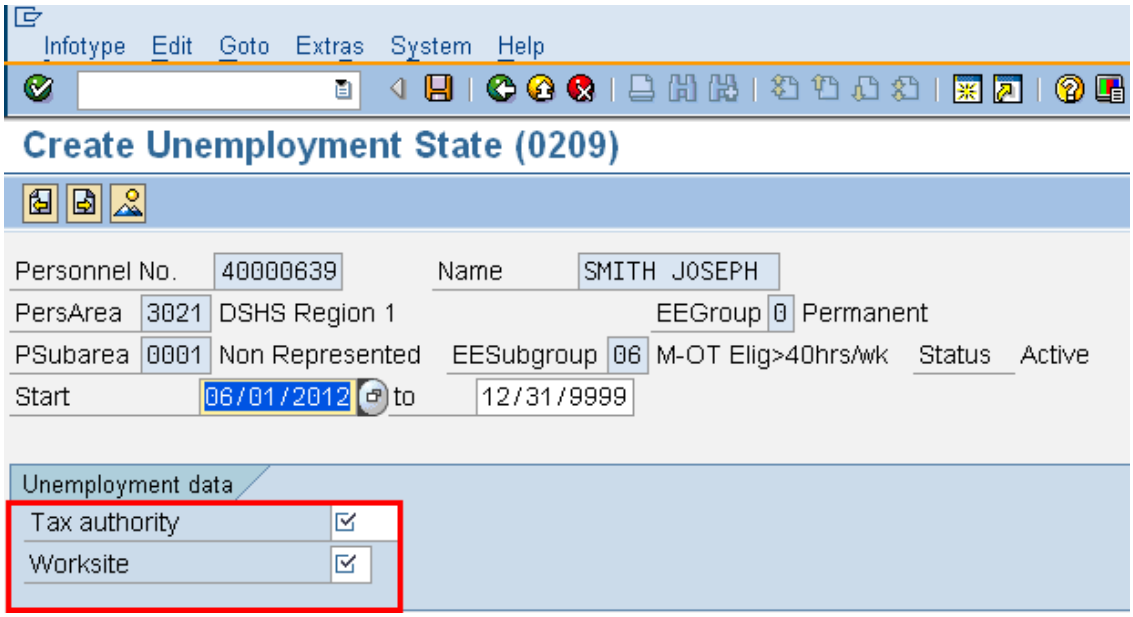
model		pay period and the amount. **Example**: WA04 Every Pay Period – Full Amount



During the **New Hire Action**, only **one** *Recurring Payment/Deduction* can be created. If the employee has **multiple** Recurring Payments/Deductions, **after** you have completed the **New Hire** action, go to **PA30** to create additional Recurring Payment/Deductions. Refer to the user procedure Recurring Payment/Deduction

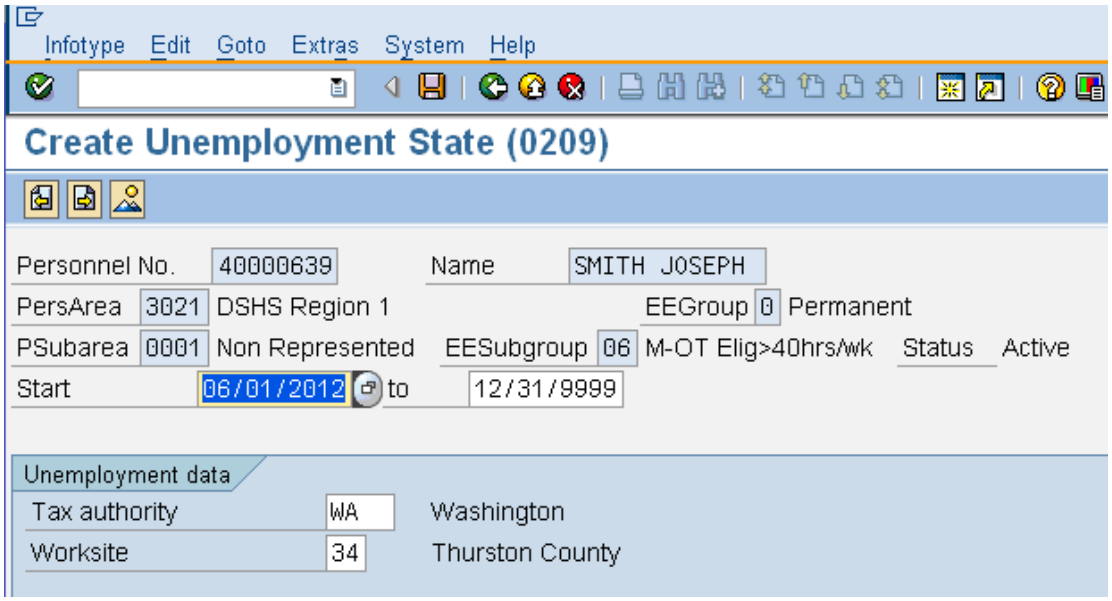
65. Click (Enter) to validate the information.

66. Click (Save) to save.

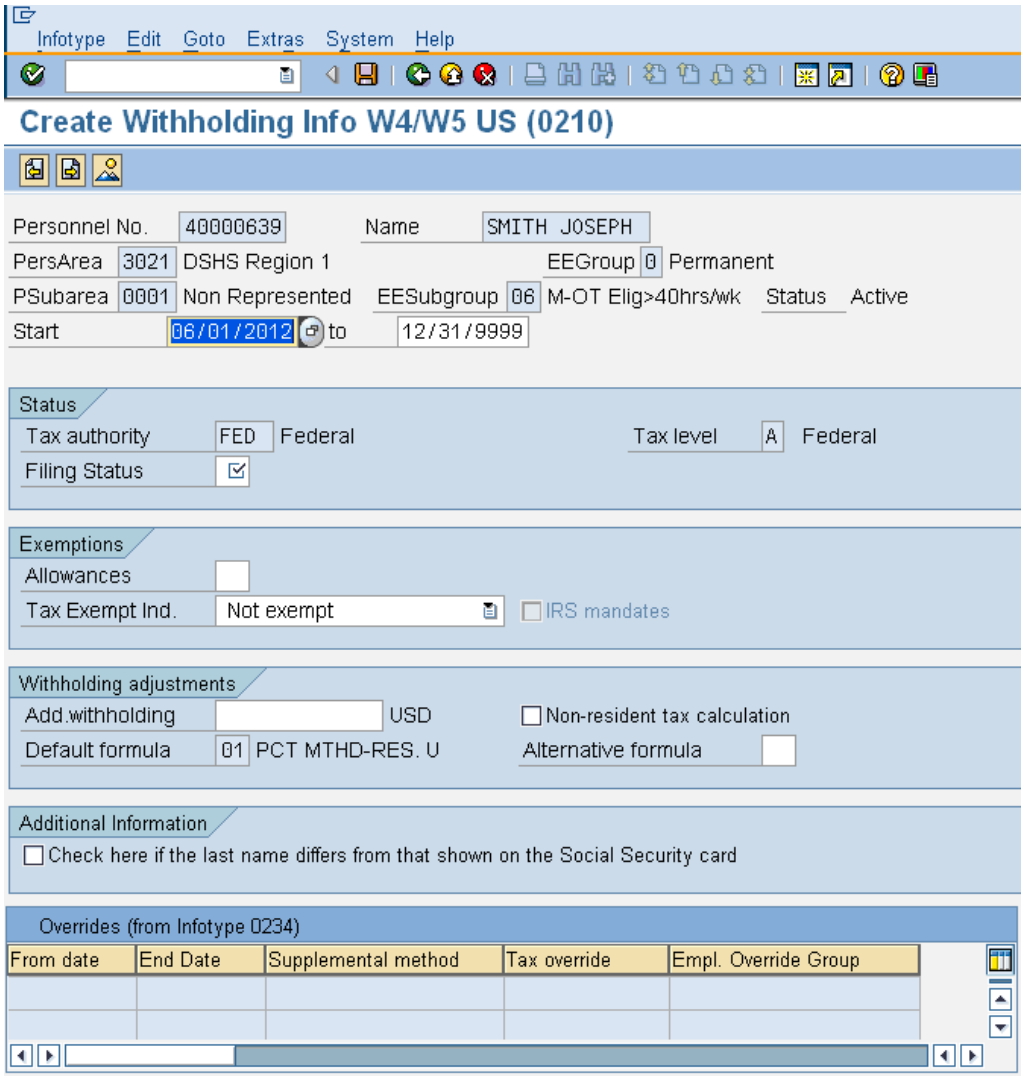


67. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Tax Authority	R	The state of employment **Example:** WA
Worksite	R	The county of employment Click on the (Matchcode) to display a list of all counties within the State of Washington. **Example:** 34- Thurston County



68. Click (Enter) to validate the information.
69. Click (Save) to save.

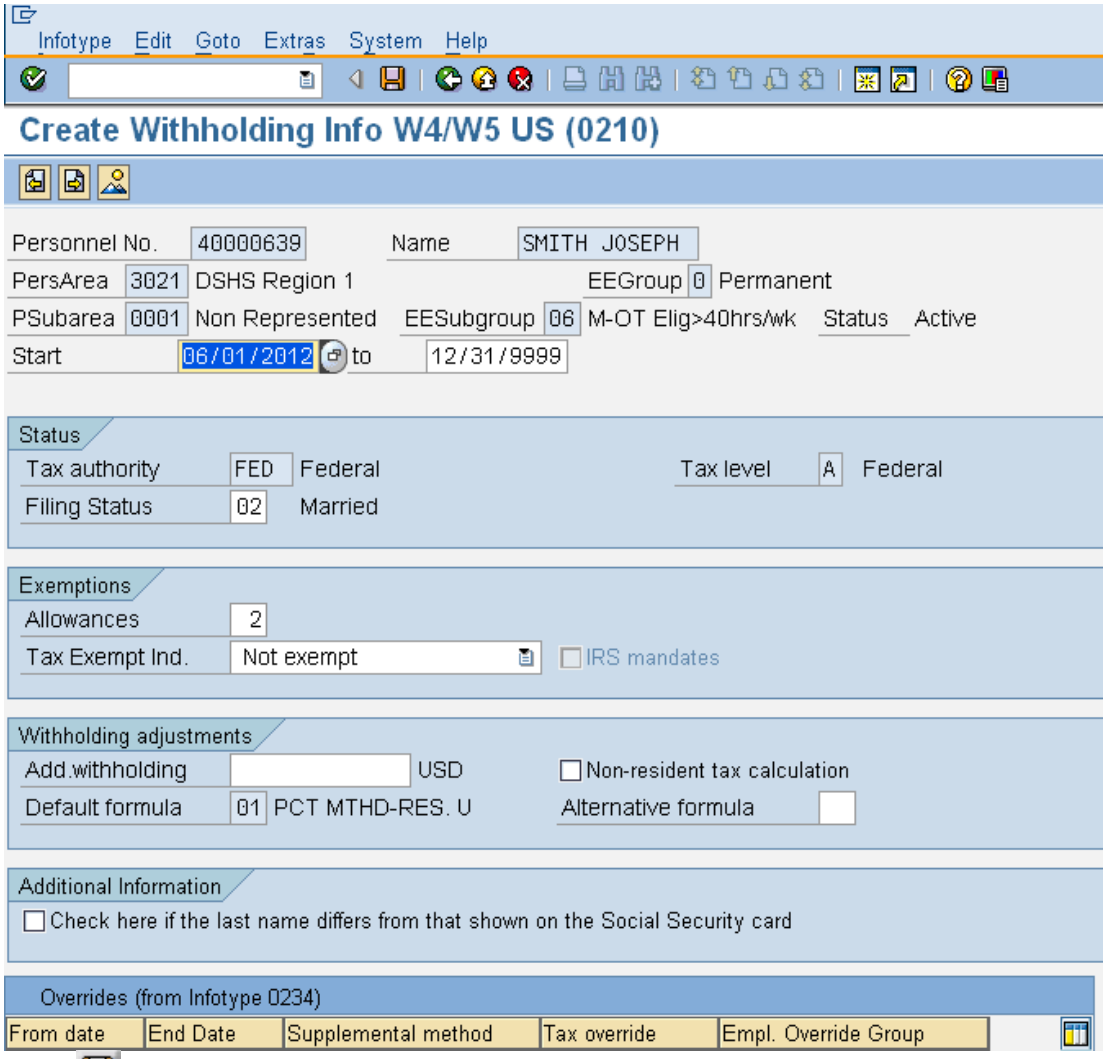


70. Complete the following fields:

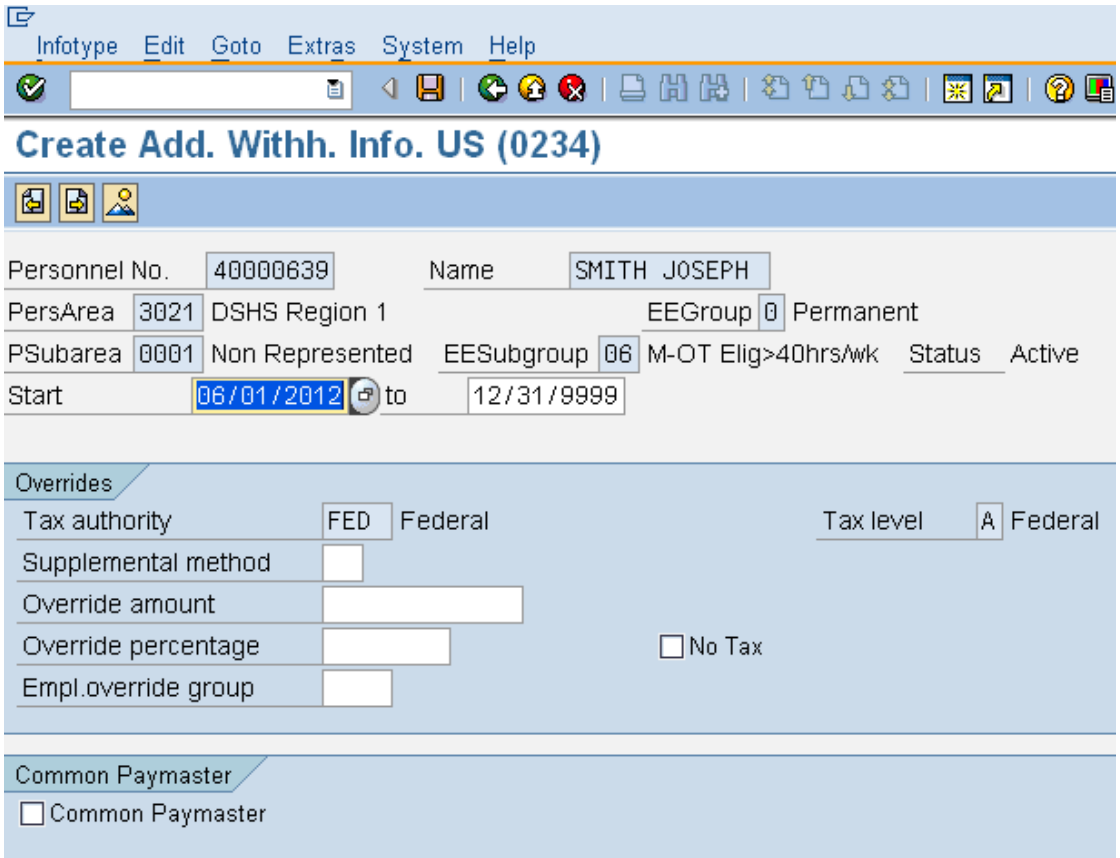
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Filing Status	R	The status elected by the employee for Federal tax withholding. **Example:** 02 – Married
Allowance	R	The number of dependents claimed for tax filing purposes. It affects the amount of taxes withheld from an employee's paycheck.

		Example: 02
Add. Withholding	O	An amount designated by the employee to be withheld from his/her check above the amount that will be taken due to filing status. **Example:** 100.00
Tax exempt Indicator	C	The indicator which determines if the employee is exempt from taxation. Using **Tax Exemption indicator Y** will make the wages exempt from taxation **and not** reportable to the IRS. Using **Tax Exemption indicator R** will make the wages exempt from taxation and earnings **are** reported to the IRS. **Example:** Y – Exempt, not reportable

71. Click (Enter) to validate the information.



72. Click (Save) to save.

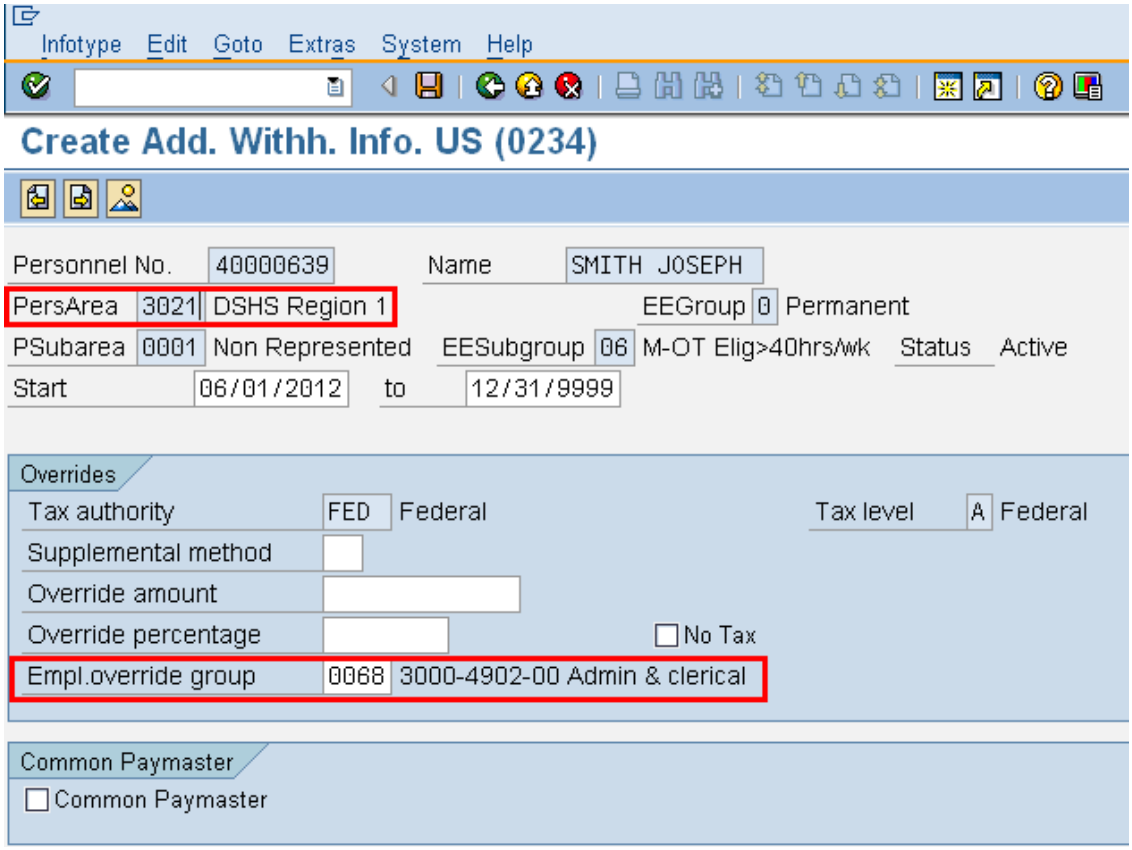


73. Complete the following:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Empl. override group	R	This is the Worker's Compensation code that an employee holds for a particular job. Click on the (Matchcode) to display all Empl.override group. The employee override group number must match your agency **Business Area**. For this example, the employee has been hired into the **Personnel Area 3021- DSHS Region 1**, which belongs to **Business Area 3000.** If the numbers do not match, it could cause incorrect amounts of Medical Aid being withheld from your employee.

		Example: 0068 3000-4902-00 Admin & Clerical

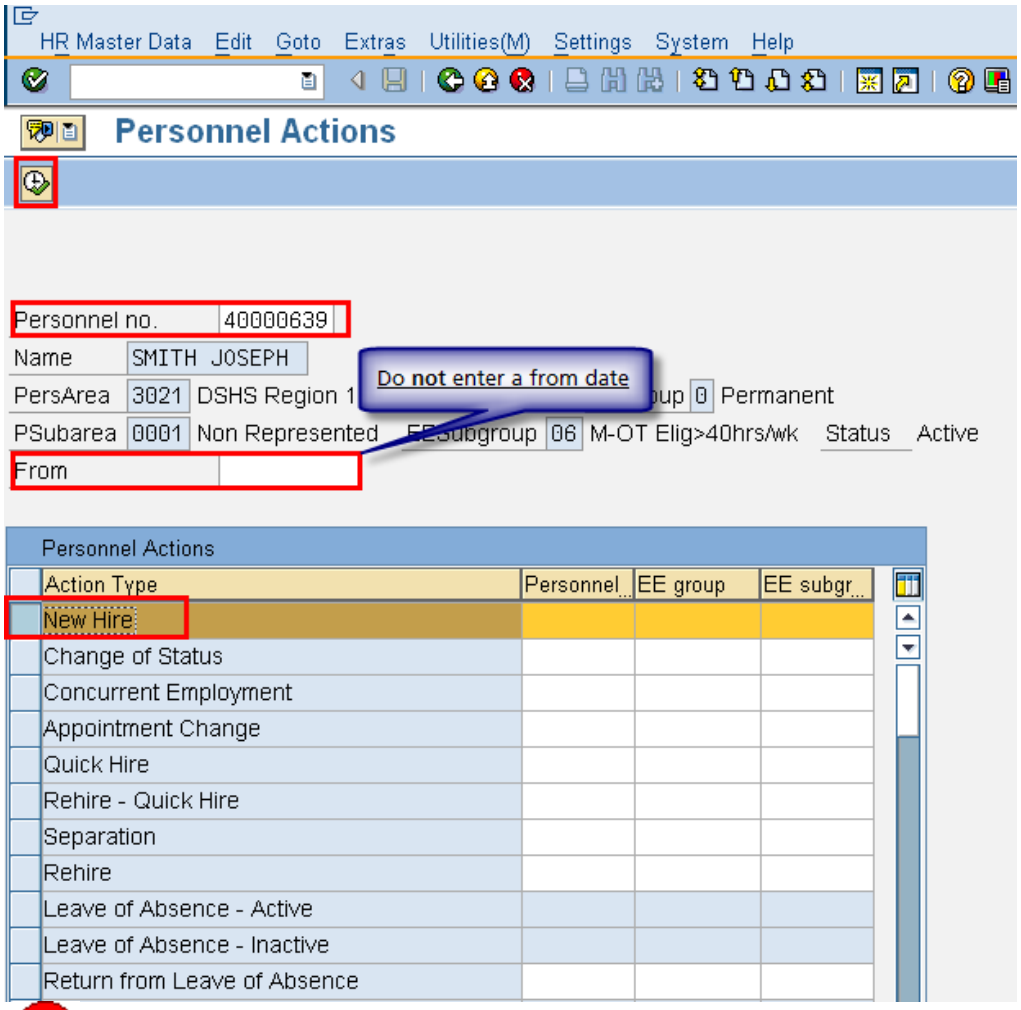
74. Click (Enter) to validate the information.



75. Click (Save) to save.

For the ***Payroll Processor***, this will mark the end of the hire action. After saving, click to exit the action and transfer the New Hire Information Packet to the ***Benefits Processor*** who will complete the action.

76. Start the transaction using the above menu path or transaction code **PA40**.



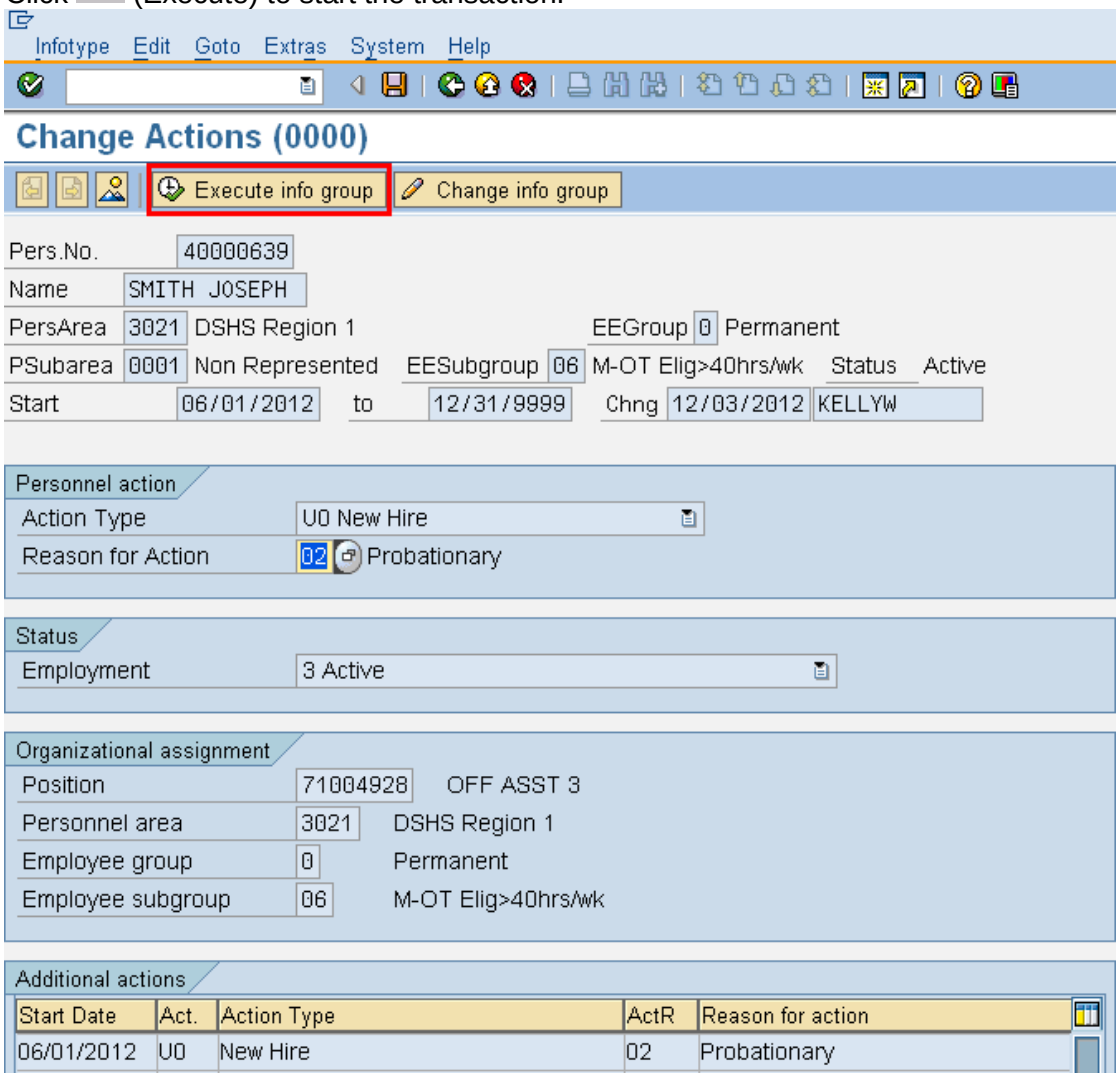
Benefits Processor –Do not put a "From" date in the field prior to executing the transaction. If you entered a "From" date click (Back) and delete the date and then click (Execute).

77. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number. **Example**: 40000639

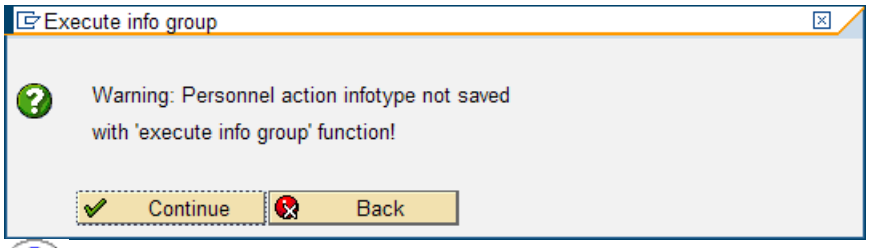
78. Click (Enter) to validate the information.

79. Click (Execute) to start the transaction.



80. Click Execute info group.

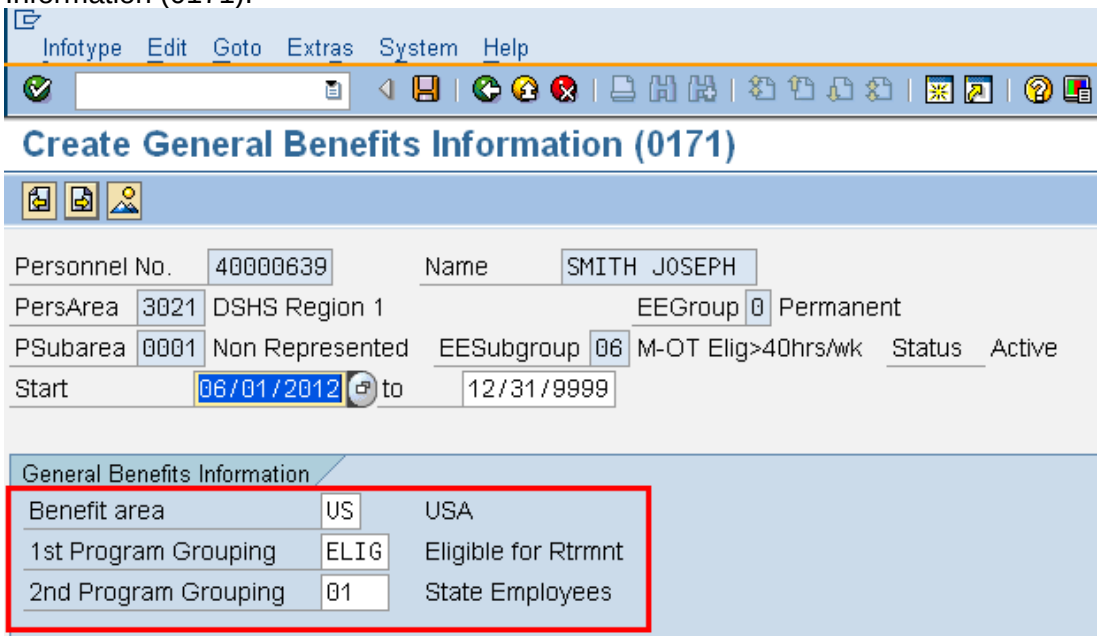
81. An Execute info group window will appear.



This infotype was already saved and it is okay to continue.

82. Click (Next Record) until you reach Subtypes for infotype Education, click (Close) to by-pass this infotype.

83. Continue to click (Next Record) until you reach Create General Benefits Information (0171).



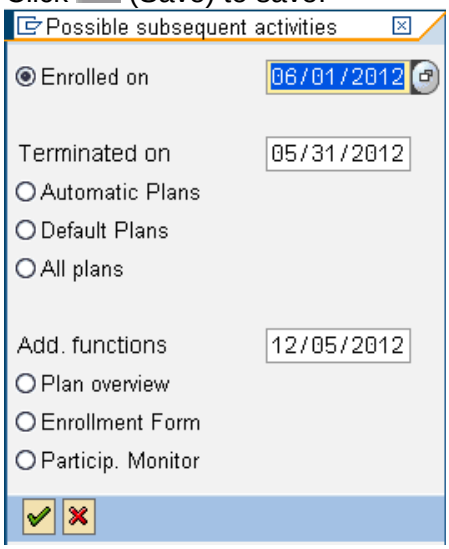
84. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
1st Program Grouping	R	This is used to determine an employee's retirement plan eligibility. The **1st Program Grouping** defaults in as eligible. To verify that the position is eligible use transaction code **PO13D**, click the gray box to the left of *Acct Assignment Features* infotype. If there is an X in the box next to

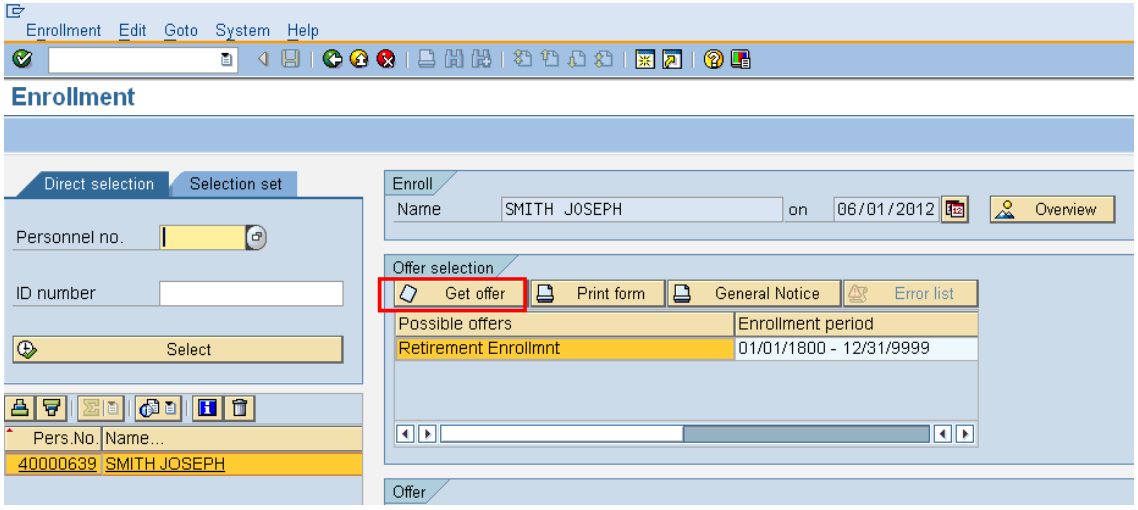
		Retirement Eligible field, then the position is retirement eligible. If the box is blank, the position is not retirement eligible. **Example**: ELIG – Eligible for Rtmnt
2nd Program Grouping	R	This defines the employee's job type and employer. The value in the **2nd Program Grouping** field defaults from the personnel area. You will have to change the **2nd Program Grouping** field if: An employee chooses a different plan. The Employee Type defaults to a code not consistent with the System/Plan set up at hiring time. An employee changes positions and wants to continue contributing to the System/Plan from his previous position rather than the one that defaults with the new position. For a list of valid type codes for each retirement system, see The Employer Handbook - Type Codes **Example**: 01

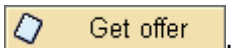
85. Click (Enter) to validate the information.

86. Click (Save) to save.

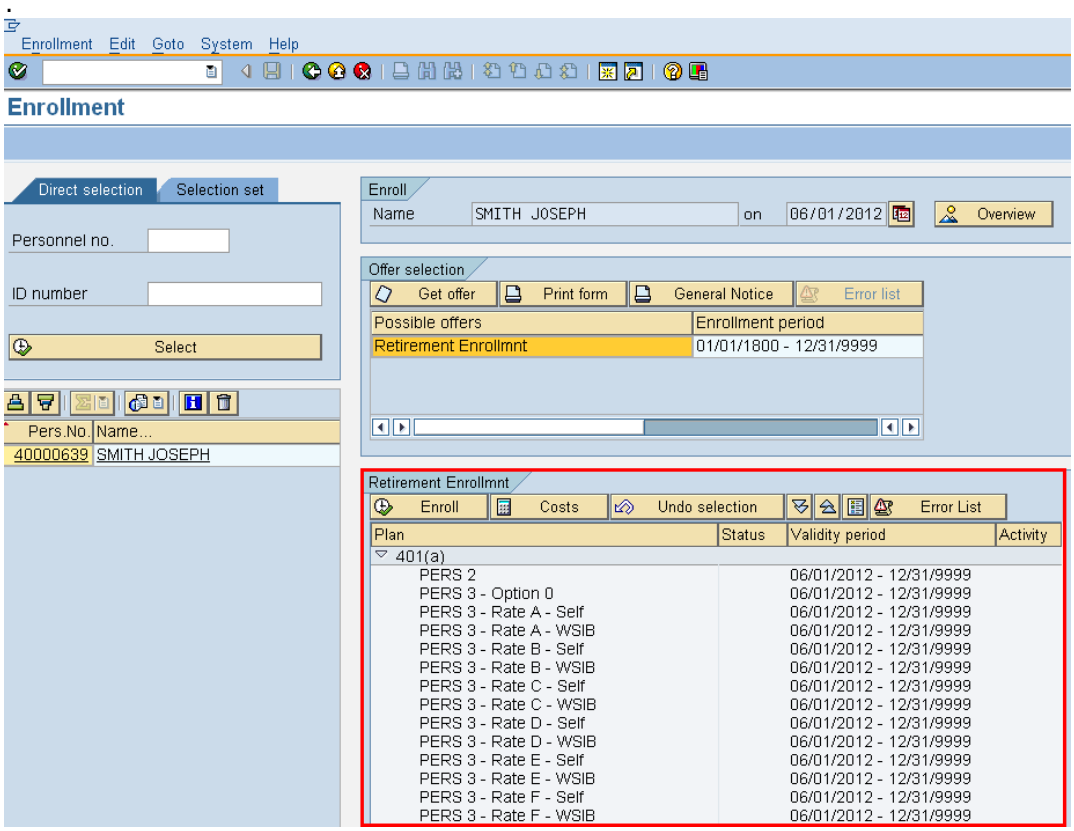


87. Click (Copy) to accept.



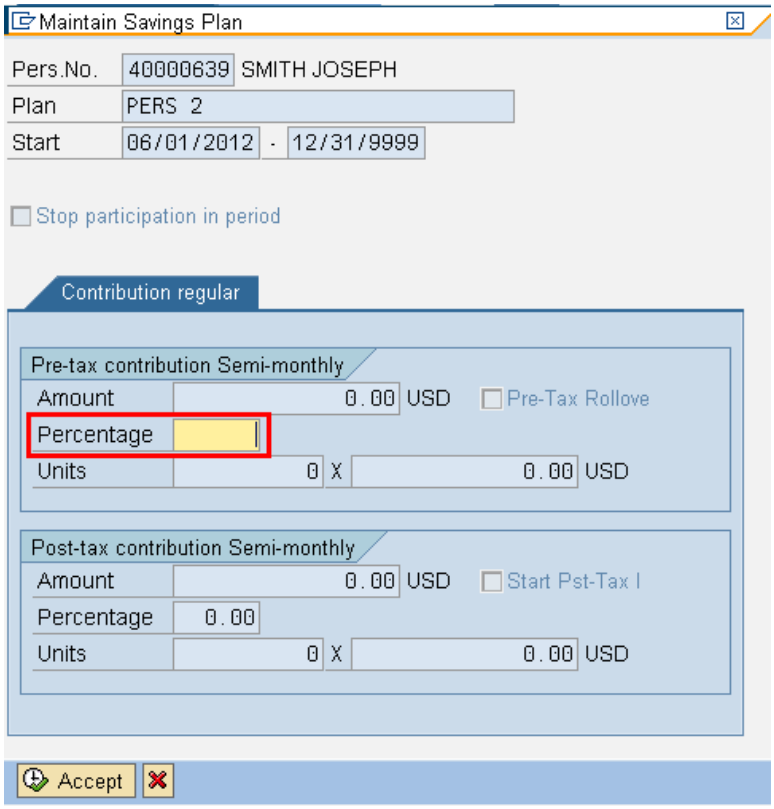
88. Click 

. By using the **PA40** transaction code, HRMS will identify all plans that the employee is eligible to participate in.



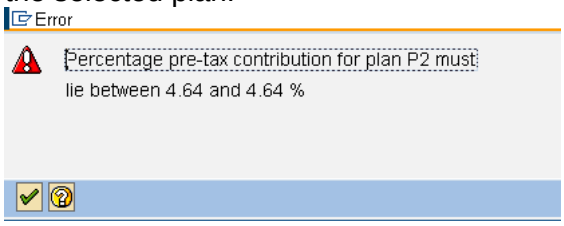
89. Click the appropriate Savings Plan. For our example, we will be enrolling into the PERS2 plan.

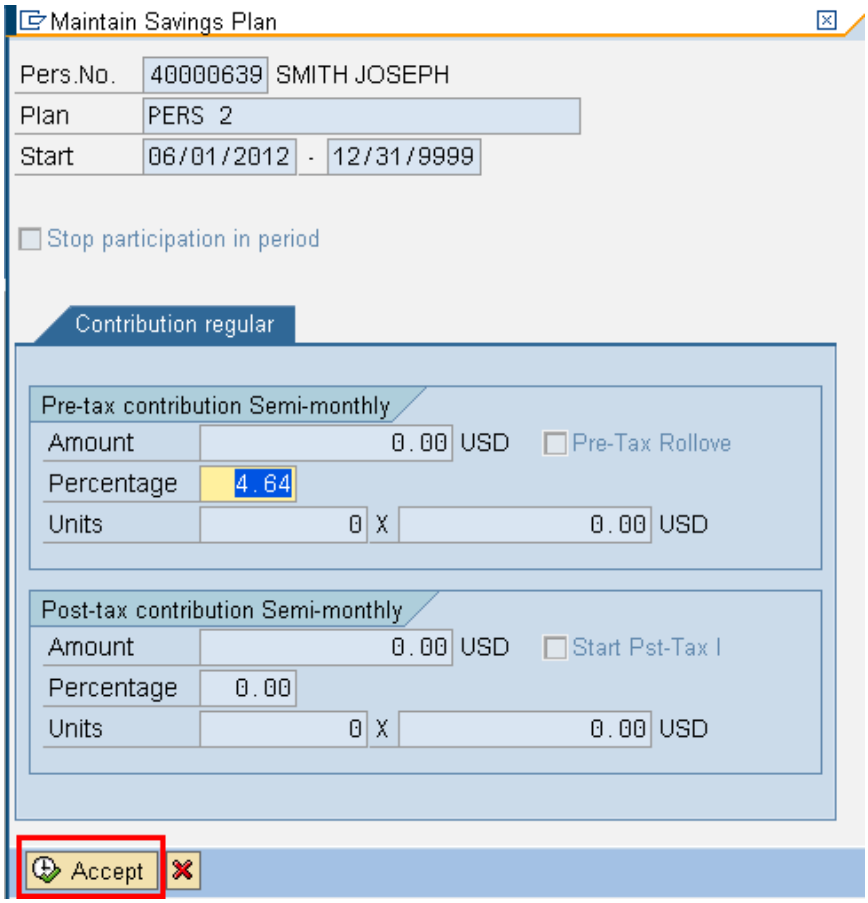
For a new PERS2 employee, upon completion of the enrollment process, immediately update the Plan Choice code on the *Savings Plans (0169)* infotype to place the employee on the 70-day/90-day default report. See the OLQR User procedure [Retirement Plan Choice Coding during 90 day period (New Hire)]



90. Complete the following fields:

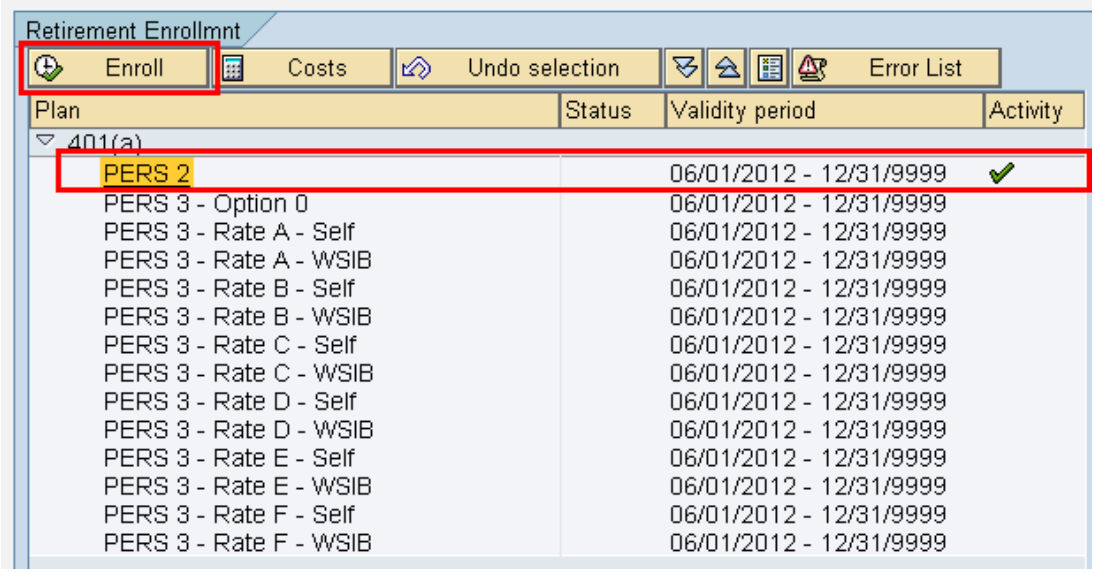
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Percentage	R	This is a field used to store a percentage amount for the retirement deduction. **Do not leave the percentage field bank or HRMS will not take any deductions for retirement.** If you do not know the correct plan contribution percentage, HRMS can prompt you. Click in the percentage field and enter any number (example: 2) and press the enter button on your keyboard. You will receive

		an Error message in the status bar telling you what the correct contribution percentage is for the selected plan.  **Example**: 4.64

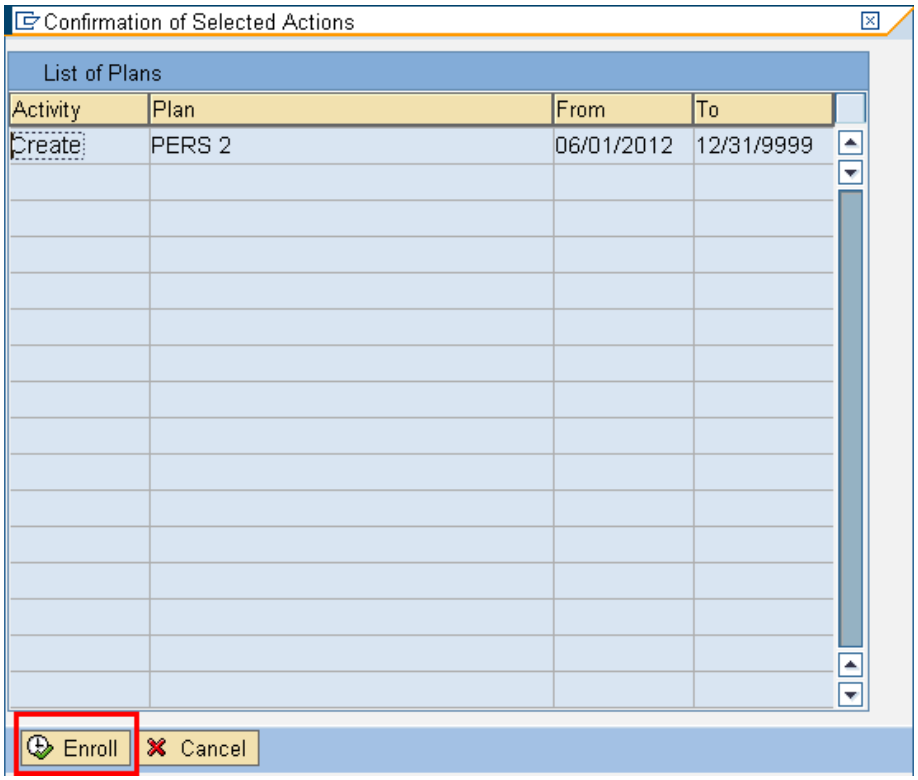


91. Click

.

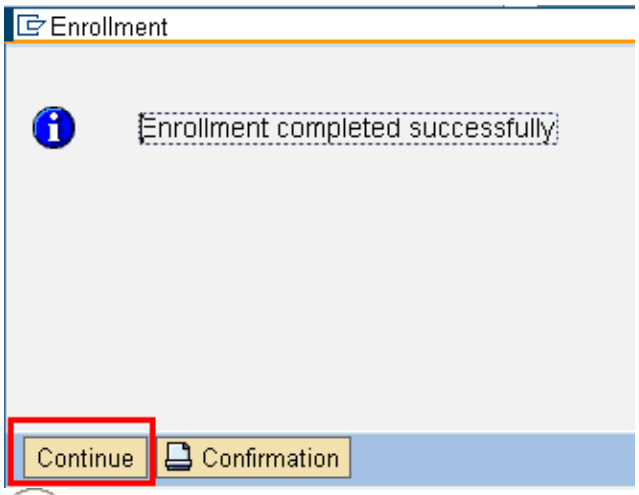


92. Click Enroll.



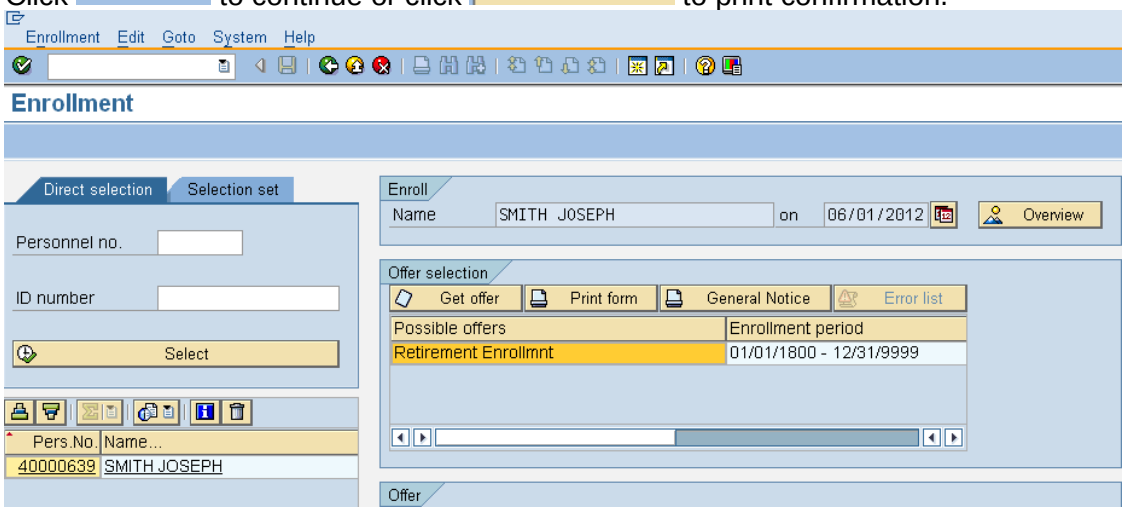
93. Click Enroll.

State of Washington

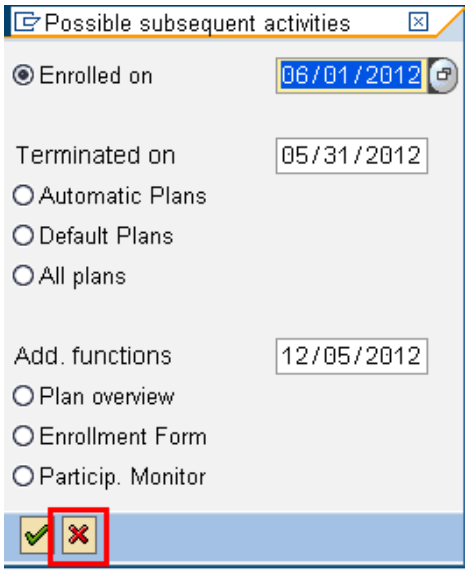


The *Confirmation* button is not configured for use by the State of Washington at this time. However, agencies may use this as a confirmation of enrollment.

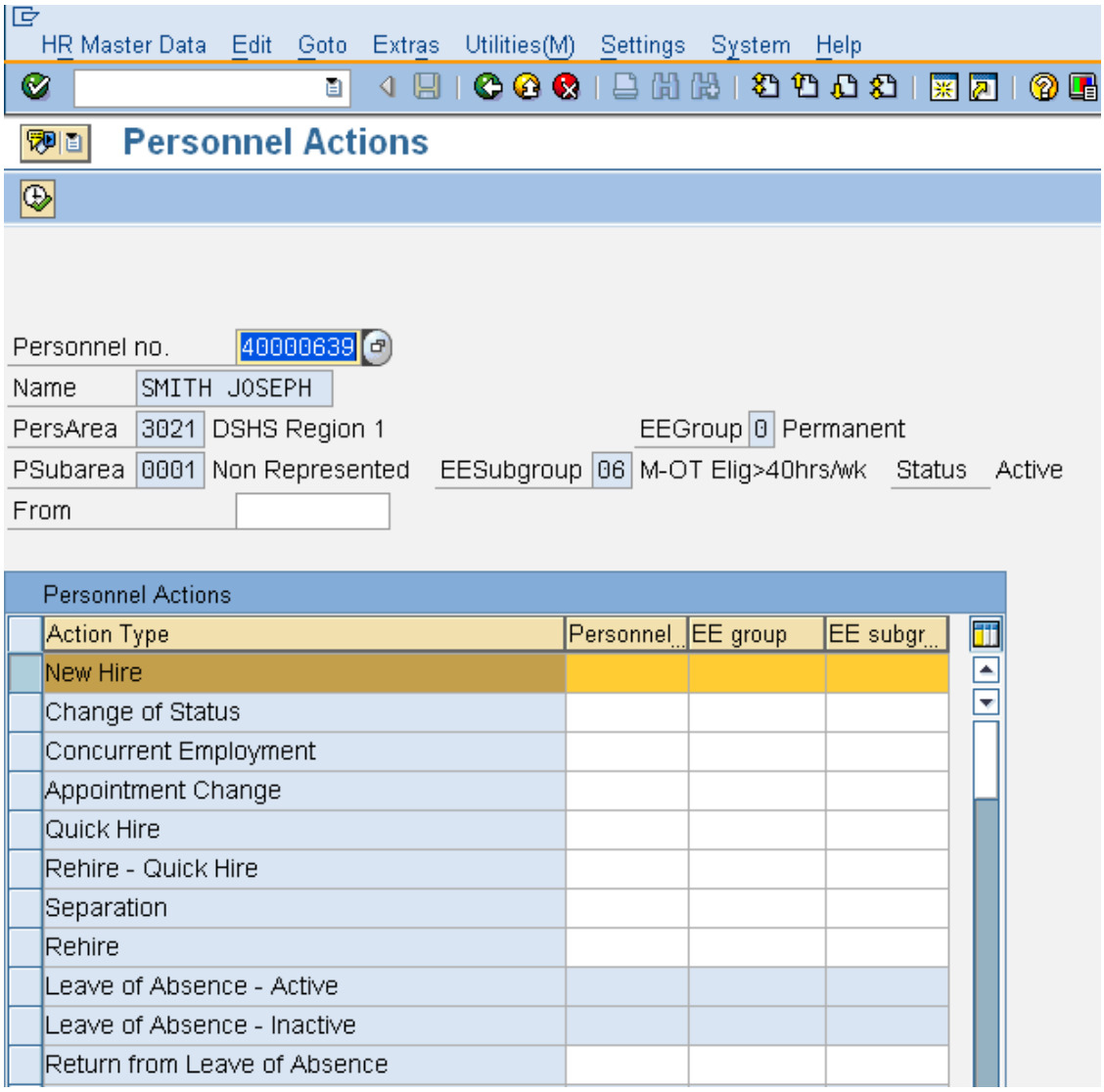
94. Click Continue to continue or click Confirmation to print confirmation.



95. You will be taken back to the Enrollment screen. Click to return to the previous screen. The Possible subsequent activities window will appear.



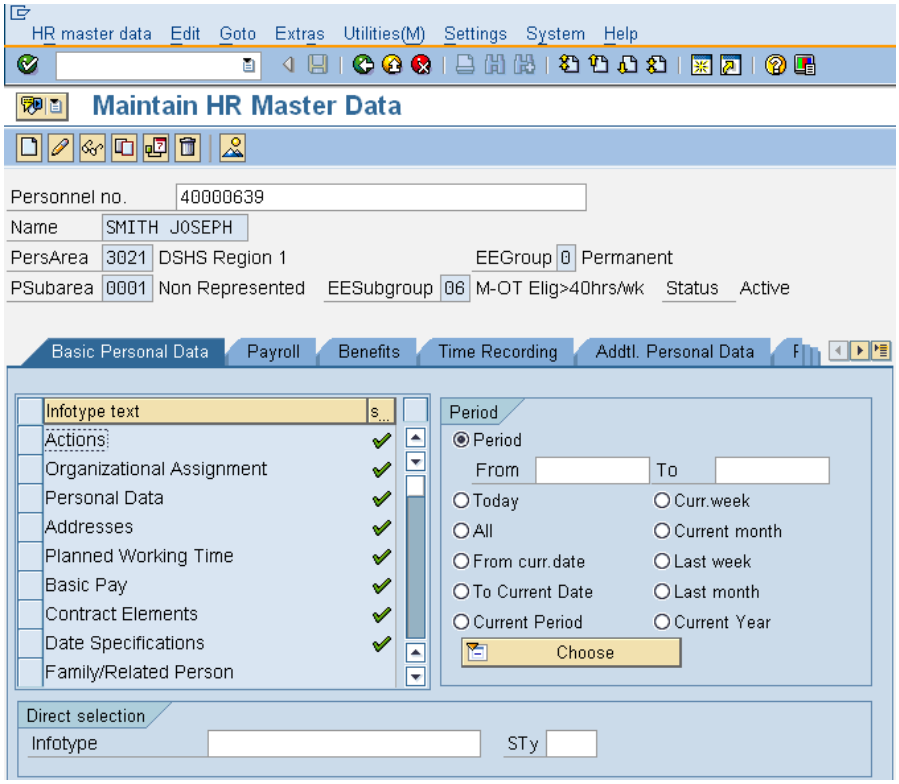
96. Click to cancel.

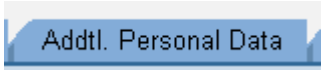


97. You will be taken back to the Personnel Actions (PA40) screen. You have hired a new employee into HRMS.

98. To enter the employee's e-mail address into HRMS

99. Enter /nPA30 in the command field

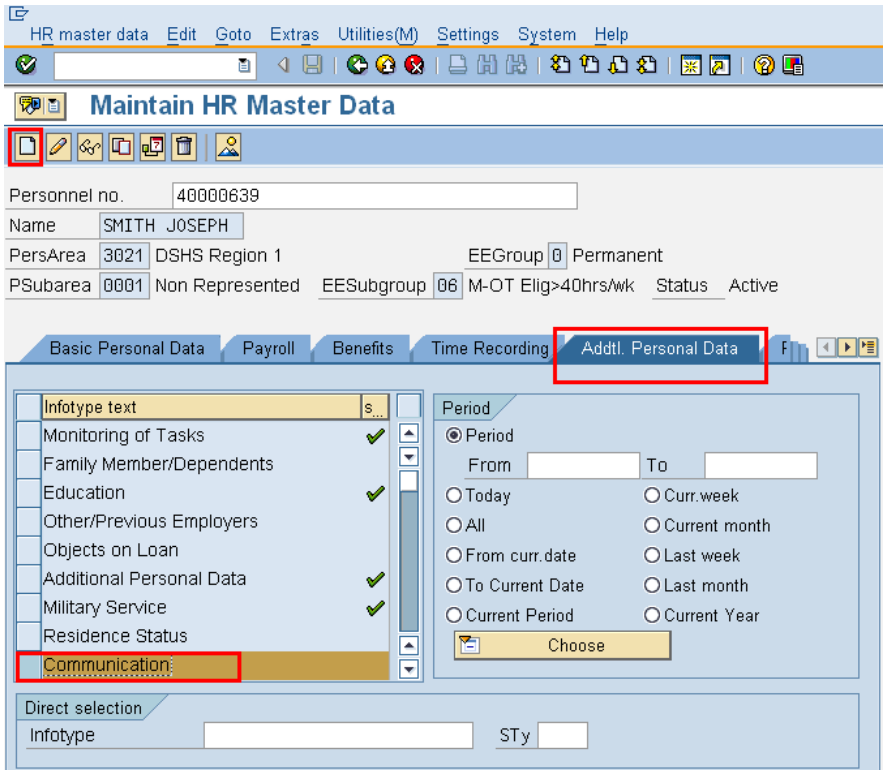


100. Select the 

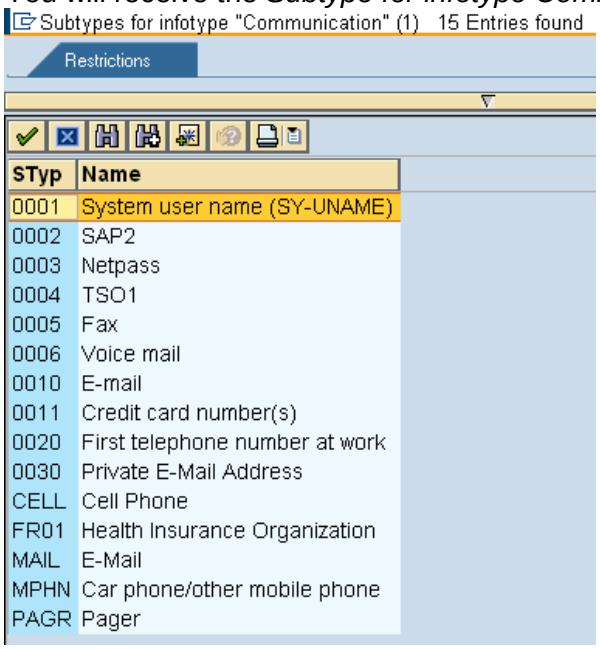
tab.

101. Click the box to the left of

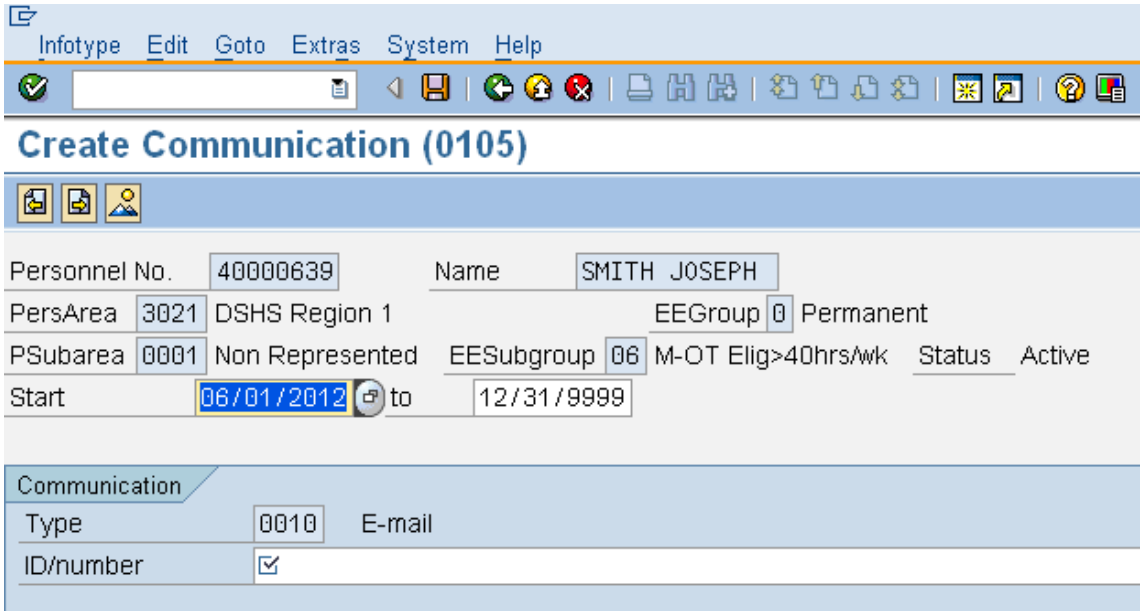
to select and click (Create) to create the record.



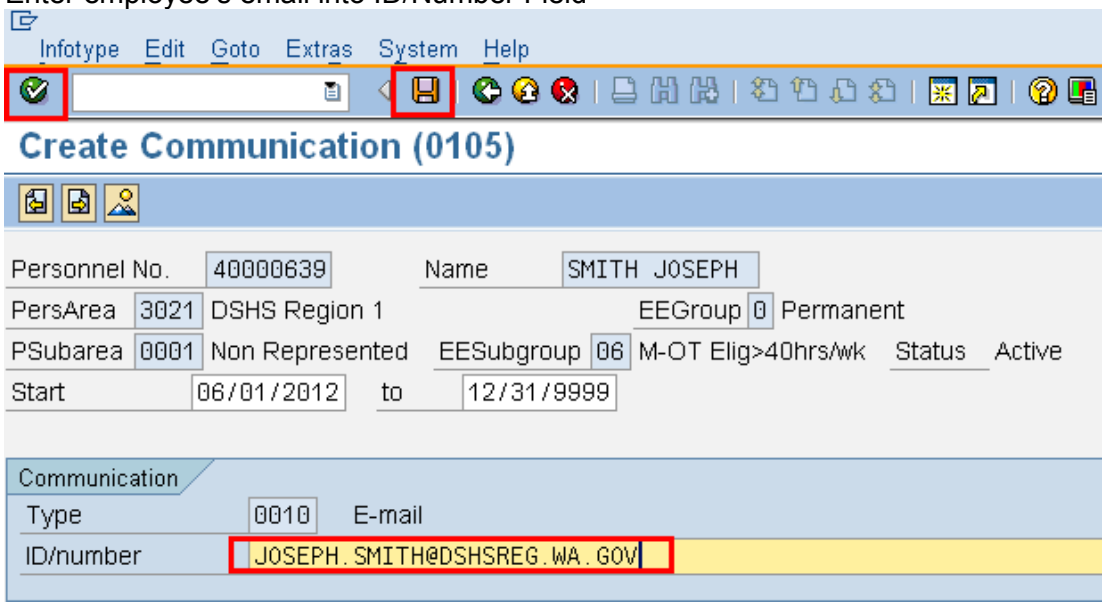
102. You will receive the *Subtype for infotype Communications Pop-up*



103. Double click 0010 E-mail to select



104. Enter employee's email into ID/Number Field



105. Click (Enter) to validate data.

106. Click (Save) to save.

107. You have completed the transaction.

Results
You have hired an employee.
Comments
If the employee is entitled to a personal holiday and has not used it this year, create a Personal Holiday quota type. If the employee chooses to stay in Plan 2 see the OLQR Procedure Retirement Plan Choice Code Chosen Plan or Defaulted to Plan 2 • If the employee chose Plan 3, see the OLQR Procedure Retirement Plan Choice Code Chosen Plan or Defaulted to Plan 3 • One of these procedures must be completed when the employee submits their completed DRS member information form designating their choice during the 90-day choice period. • The employee that is enrolled in Plan 2 will default to P3, Rate A – WSIB invest manager if no plan is chosen within the 90-day period.