

Instructions for Performance Rating Maintainer: Maintain HR Master Data (PA30) Entering Performance Ratings in Beacon SAP

To enter employee performance ratings in Beacon SAP, the **Performance Rating Maintainer** will need to use transaction code PA30 for the following infotype/subtype:

Infotype	Subtype
0024 – Qualifications	N/A

Also, please note that there are two sets of instructions:

- (A) Instructions for entering performance ratings in SAP for employees that were hired **BEFORE** January 26, 2015.
- (B) Instructions for entering performance ratings in SAP for employees who were hired **AFTER** January 26, 2015.

*Note: If you enter the same rating/status code for Cycle 27 that was entered in the previous year(s), once you  Save your entry, the Cycle 27 row (07/01/2014 to 06/30/2015) will collapse and combine with the timeframe of the previous year(s). For example, if an employee received a “Very Good” for Cycle 26 (07/01/2013 to 06/30/2014) and then receives a “Very Good” for Cycle 27 (07/01/2014 to 06/30/2015), upon clicking  Save, the direct entry screen will display that the employee received a “Very Good” for **07/01/2013 to 06/30/2015**. Therefore, it is important to review the “Start” and “End” cycle dates to determine rating codes for performance cycles as it may reflect ratings for multiple years.*

(A) Instructions for Entering Performance Ratings in SAP for Employees Hired BEFORE January 26, 2015

Employees that were in Beacon SAP at the time Cycle 27 opened for direct entry (January 26, 2015), will have a performance rating entry line that contains “Rating Not Entered” and the performance cycle period of 07/01/2014 to 06/30/2015 will be displayed on the direct entry screen. Please follow the below instructions for direct entry:

1. Go to <https://mybeacon.nc.gov> and log into the BEACON portal using your NCID log-on ID and password.
2. Click on the “SAP GUI” tab to launch SAP.



3. Type “PA30” in the command field of the SAP Easy Access Window and press  Enter to go to the “Maintain HR Master Data” screen.



Maintain HR Master Data Screen (PA30):

4. Enter the employee’s personnel number or use the  matchcode to find the employee.
5. In the “Direct Selection” area next to “Infotype,” enter “0024” (for Qualifications infotype).

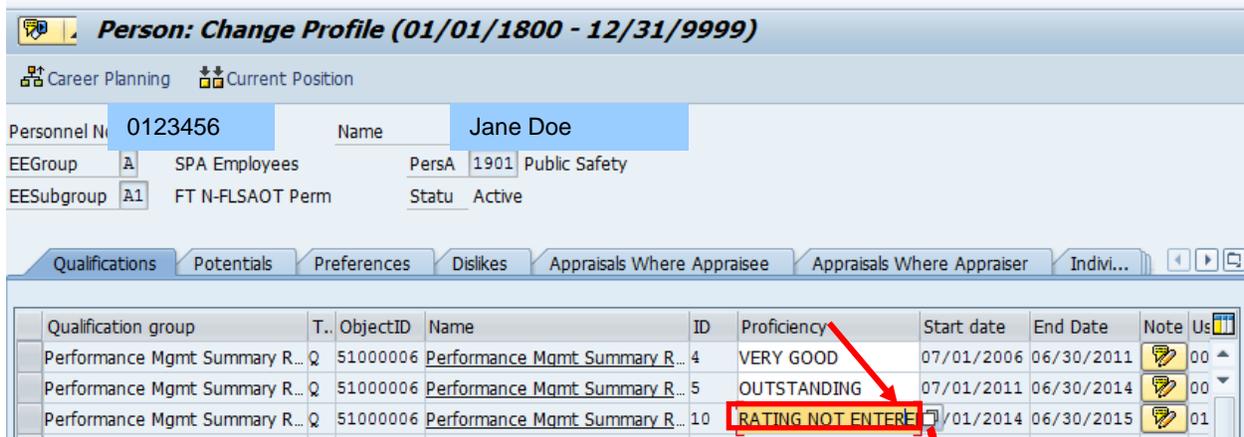
Note: The subtype field should be left blank.



4. Press  Enter to ensure you are viewing the correct employee and the Qualifications Infotype will display.
5. Click the  Create icon.

Person – Change Profile Screen:

6. On the Change Profile screen, you will see “Rating Not Entered” in the “Proficiency” column next to Cycle 27 (07/01/2014 to 06/30/2015) *(Note: If the “Qualifications” tab is blank, please refer to instructions B).* Click on “Ratings Not Entered” and the  matchcode will appear.



Click on the  matchcode and the following pop-up will appear

ID	Proficiency
0001	UNSATISFACTORY
0002	BELOW GOOD
0003	GOOD
0004	VERY GOOD
0005	OUTSTANDING
0006	INSUFFICIENT TIME TO EVALUATE
0007	LWOP STATUS
0008	EVALUATION NOT DONE
0009	W - FINAL DISCIPLINARY PROCEDURE
0010	RATING NOT ENTERED

7. Once the above **Summary Ratings Scale pop-up** appears, select the appropriate rating or status from the list and then click . (Note: If this does not work, try to **DOUBLE** click on the appropriate rating code). The Summary Ratings Scale pop-up disappears and the rating code should now be displayed in the “**Proficiency**” column, automatically replacing the “**Rating Not Entered**” that was previously displayed in that field. (See below example).

Qualification group	T.	ObjectID	Name	ID	Proficiency	Start date	End Date	Note	Us
Performance Mgmt Summary R...	Q	51000006	Performance Mgmt Summary R...	4	VERY GOOD	07/01/2006	06/30/2011		00
Performance Mgmt Summary R...	Q	51000006	Performance Mgmt Summary R...	5	OUTSTANDING	07/01/2011	06/30/2014		00
Performance Mgmt Summary R...	Q	51000006	Performance Mgmt Summary R...	0005	OUTSTANDING	07/01/2014	06/30/2015		01

8. If you need to enter Comments (for LWOP Status, Evaluation Not Done, or Final Disciplinary Procedure), select the “Note”  icon (see below).

Select the “Note” icon to add comments.

Qualification group	T.	ObjectID	Name	ID	Proficiency	Start date	End Date	Note	Us
Performance Mgmt Summary R...	Q	51000006	Performance Mgmt Summary R...	4	VERY GOOD	07/01/2006	06/30/2011		00
Performance Mgmt Summary R...	Q	51000006	Performance Mgmt Summary R...	5	OUTSTANDING	07/01/2011	06/30/2014		00
Performance Mgmt Summary R...	Q	51000006	Performance Mgmt Summary R...	0005	OUTSTANDING	07/01/2014	06/30/2015		01

The “Notes Change” pop-up appears. Enter your Comments in the text field then click  Save. To return back to the “Change Profile” screen, click on the  back arrow.

9. Press  Enter.
10. Click  Save.

NOTE: If you get an error message that states, “**You do not have authorization to do this,**” please contact Best Shared Services.

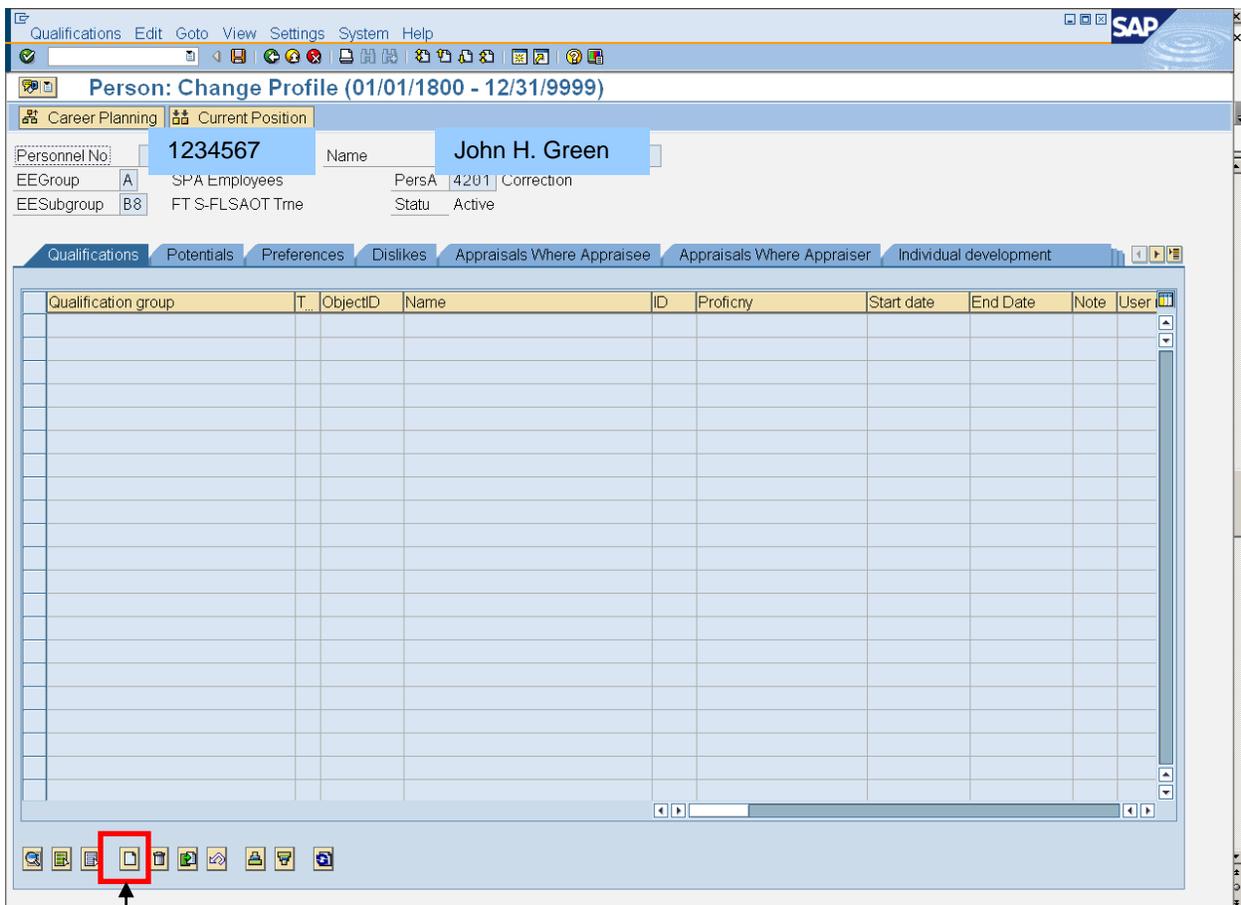
11. To return to the Maintain HR Master Data screen, click the  Back arrow on the toolbar.

(B) Instructions for Entering Performance Ratings in SAP for Employees Hired AFTER January 26, 2015

For employees that were NOT in Beacon SAP at the time Cycle 27 opened for direct entry (approximately January 26, 2015), additional steps are necessary in order to enter a performance status code. Specifically, the “Qualification” tab on the “Change Profile” screen may be blank (i.e. no performance cycle dates, no rating code, etc.). If the “Qualification” information does not appear on the “Change Profile” screen, please follow the below steps:

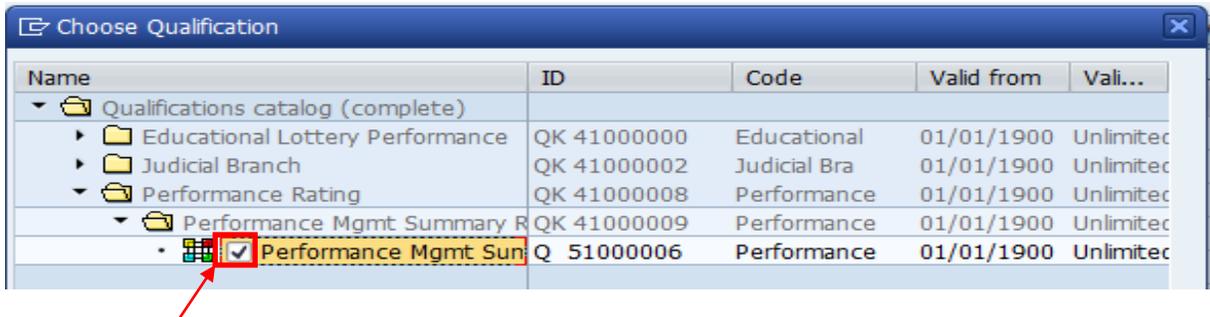
Person – Change Profile Screen:

1. Click the  Create icon.

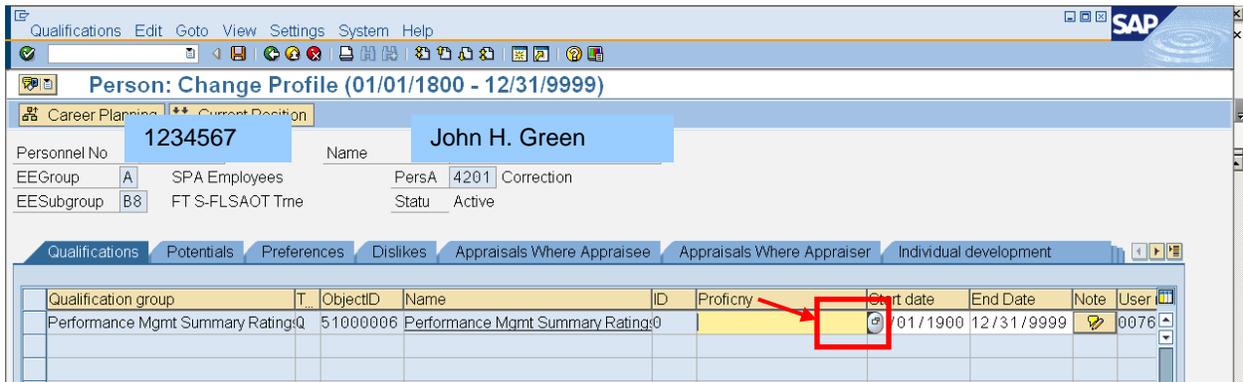


Create Icon

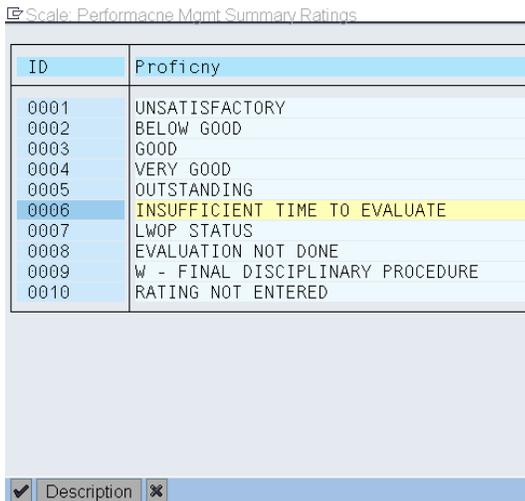
- When the “**Choose Qualification**” pop-up appears, put a check mark in the box next to “**Performance Mgmt Summary Ratings**” and then click  Continue.



- When you return back to the “**Change Profile**” screen, click in the “**Proficiency**” column to select the  matchcode.



- Once you click on the  matchcode, the following pop-up will appear:



- Once the above **Summary Ratings Scale pop-up** appears, select the appropriate rating or status from the list and then click . (Note: If this does not work, try to **DOUBLE** click on the appropriate rating code).

Note: Remember that **New Hires & Reinstatements that have not completed a 12-month performance cycle must be coded “Insufficient Time to Evaluate.”**

The Summary Ratings Scale pop-up disappears and the rating code should now be displayed in the **“Proficiency”** column. (See below example).

Qualification group	T.	ObjectID	Name	ID	Proficny	Start date	End Date	Note	User
Performance Mgmt Summary Rating:Q		51000006	Performance Mgmt Summary Rating:0006		INSUFFICIENT TIME TO	/01/1900	12/31/9999		0076

- The Start and End dates need to be changed to reflect the Cycle 27 timeframe. To update the **“Start Date,”** click in the **“Start Date”** field and change the value to **“07/01/2014.”** To update the **“End Date,”** click in the **“End Date”** field and change the value to **“06/30/2015.”** (see below example).

Qualification group	T.	ObjectID	Name	ID	Proficiency	Start date	End Date	Note	Us
Performance Mgmt Summary R...	Q	51000006	Performance Mgmt Summary R...	0006	INSUFFICIENT TIME ...	07/01/2014	06/30/2015		01

Note: Please be sure to **ONLY** enter the Cycle 27 timeframe of 07/01/2014 to 06/30/2015 in the **“Start”** and **“End”** date fields. If you enter an incorrect date, something different than 07/01/2014 to 06/30/2015, and then click  Save, you will **NOT** be able to correct these dates. To correct the cycle dates, you will need to contact **BEST Shared Services.**

- If you need to enter Comments, select the **“Note”**  icon and enter your comments then click  Save. To return back to the **“Change Profile”** screen, click on the  Back arrow .

- Press  Enter.

- Click  Save.

- To return to the Maintain HR Master Data screen, click the  Back arrow on the toolbar.

Viewing Performance Ratings in SAP

1. Go to <https://mybeacon.nc.gov> and log into the BEACON portal using your NCID log-on ID and password.
2. Click on the “SAP GUI” tab to launch SAP.



3. Type “PA20” in the command field of the SAP Easy Access Window and press  Enter to go to the “Display HR Master Data” screen.



Display HR Master Data Screen (PA20):

4. Enter the employee’s personnel number or use the  matchcode to find the employee.
5. In the “Direct Selection” area next to “Infotype,” enter “0024” (for Qualifications infotype).

Note: The subtype field should be left blank.



6. Press  Enter to ensure you are viewing the correct employee and the Qualifications Infotype will display.
7. Click the  Display icon to take you to the “Person – Display Profile” screen.

Person – Display Profile Screen:

Qualification group	T..	ObjectID	Name	ID	Proficiency	Start date	End Date	Note	Us
Performance Mgmt Summary R...	Q	51000006	Performance Mgmt Summary R...	5	OUTSTANDING	07/01/2006	06/30/2013		01
Performance Mgmt Summary R...	Q	51000006	Performance Mgmt Summary R...	4	VERY GOOD	07/01/2013	06/30/2014		01

Remember to check the “Start” and “End” date field to find an employee’s performance rating for a particular cycle. Be sure to check these dates carefully since the dates may span more than one performance cycle.

In the above example, this employee received an “**Outstanding**” performance rating for **07/01/2006 to 06/30/2013**, which illustrates that those years were collapsed since the performance rating was the same for each year. For Rating Cycle #26 **07/01/2013 to 06/30/2014** the employee received a Very Good. Since the performance rating for Rating Cycle #26 was different from previous years, it did not collapse.

Correcting/Changing Performance Ratings in SAP

Please be advised that you will be able to make corrections and/or changes to a Cycle 27 rating/status code **IF and ONLY IF** the Cycle 27 rating/status code that was entered incorrectly was **NOT** the same rating/status code that was entered the previous cycle(s). Remember, when the same rating/status code is entered as the previous year, upon saving the entry, the rows merge and the cycle timeframes combine to reflect the same rating/status code for multiple performance cycles. If the cycle timeframes combined and reflect multiple cycles, you will have to contact BEST Shared Services to make any corrections for Cycle 27.

If the Cycle 27 timeframe did NOT combine with previous cycles (i.e. “Start” and “End” date is 07/01/2014 to 06/30/2015), you will be able to correct the Cycle 27 entry. Please follow the below instructions:

1. Go to <https://mybeacon.nc.gov> and log into the BEACON portal using your NCID log-on ID and password.
2. Click on the “SAP GUI” tab to launch SAP.



3. Type “PA30” in the command field of the SAP Easy Access Window and press  Enter to go to the “Maintain HR Master Data” screen.



Maintain HR Master Data Screen (PA30):

4. Enter the employee’s personnel number or use the  matchcode to find the employee.
5. In the “Direct Selection” area next to “Infotype,” enter “0024” (for Qualifications infotype).

Note: The subtype field should be left blank.



6. Press  Enter to ensure you are viewing the correct employee and the Qualifications Infotype will display.
7. Click the  Change icon to take you to the “Person – Display Profile” screen.

Person – Change Profile Screen:

8. On the Change Profile screen, you will see the incorrect rating/status code next to Cycle 27 (07/01/2014 to 06/30/2015). In the “**Proficiency**” column, click on the  matchcode.

Qualification group	T.	ObjectID	Name	ID	Proficiency	Start date	End Date	Note	Us
Performance Mgmt Summary R...	Q	51000006	Performance Mgmt Summary R...	5	OUTSTANDING	07/01/2006	06/30/2013		01
Performance Mgmt Summary R...	Q	51000006	Performance Mgmt Summary R...	4	VERY GOOD	07/01/2013	06/30/2014		01
Performance Mgmt Summary R...	Q	51000006	Performance Mgmt Summary R...	0003	GOOD	07/01/2014	06/30/2015		01

Click on the  matchcode.”

The following pop-up will appear:

ID	Proficiency
0001	UNSATISFACTORY
0002	BELOW GOOD
0003	GOOD
0004	VERY GOOD
0005	OUTSTANDING
0006	INSUFFICIENT TIME TO EVALUATE
0007	LWOP STATUS
0008	EVALUATION NOT DONE
0009	W - FINAL DISCIPLINARY PROCEDURE
0010	RATING NOT ENTERED

7. Once the above **Summary Ratings Scale pop-up** appears, select the CORRECT rating or status code from the list and then click . (Note: If this does not work, try to **DOUBLE** click on the appropriate rating code). The Summary Ratings Scale pop-up disappears and the NEW rating code should now be displayed in the “**Proficiency**” column.
8. Since a correction/change is being made, please select the “Note”  icon and make an appropriate explanation for the change (i.e. *direct entry error, etc.*). Be sure to  Save your comments. To return back to the “Change Profile” screen, click on the  Back arrow .
9. Press  Enter.
10. Click  Save.