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** April 23, 2011.

(B)   Instructions for entering performance ratings in SAP for employees who were hired **AFTER** April 23, 2011.

Note: If you enter the same rating/status code for Cycle 24 that was entered in the previous year(s), once you 🔲
Save your entry, the Cycle 24 row (07/01/2011 to 06/30/2012) will collapse and combine with the timeframe of the previous year(s). For example, if an employee received a "Very Good" for Cycle 23 (07/01/2010 to 06/30/2011) and then receives a "Very Good" for Cycle 24 (07/01/2011 to 06/30/2012), upon clicking 🔲 *Save, the direct entry screen will display that the employee received a "Very Good" for **07/01/2010 to 06/30/2012**. 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 April 23, 2012

Employees that were in Beacon SAP at the time Cycle 24 opened for direct entry (April 23, 2012), will have a performance rating entry line that contains "Rating Not Entered" and the performance cycle period of 07/01/2011 to 06/30/2012 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.

SAP Easy Access

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.

Direct selection		
Infotype	0024	STy

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 24 (07/01/2011 to 06/30/2012) *(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
next to "Rating Not Entered."

Qualification group	T.	ObjectID	Name	ID	Proficny	Start date	End Date	Note	U
Performance Mgmt Summary R..Q	51000006	Performance Mgmt Summary R..5	OUTSTANDING	07/01/2006	06/30/2008		00
Performance Mgmt Summary R..Q	51000006	Performance Mgmt Summary R..3	GOOD	07/01/2008	06/30/2010		00
Performance Mgmt Summary R..Q	51000006	Performance Mgmt Summary R..4	VERY GOOD	07/01/2010	06/30/2011		00
Performance Mgmt Summary R..Q	51000006	Performance Mgmt Summary R..1	RATING NOT ENTERED	07/01/2011	06/30/2012		ZP

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

Scale: Performacne Mgmt Summary Ratings

ID	Proficny
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

✔ Description ✖

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).*
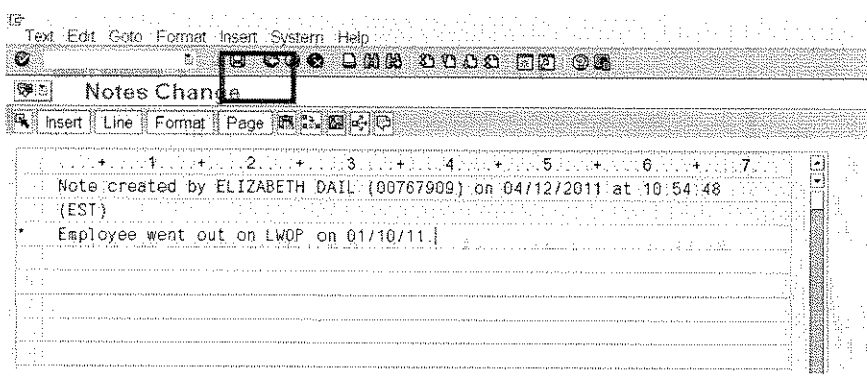
Proficny	Start date	End Date
VERY GOOD	07/01/2010	06/30/2011
VERY GOOD	07/01/2011	06/30/2012

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	Proficny	Start date	End Date	Note	U:
Performance Mgmt Summary R..Q		51000006	Performance Mgmt Summary R..4		VERY GOOD	07/01/2010	06/30/2011		00
Performance Mgmt Summary R..Q		51000006	Performance Mgmt Summary R..4		VERY GOOD	07/01/2011	06/30/2012		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.

Text Edit Goto Format Insert System Help

Notes Change

Insert | Line | Format | Page

Note created by ELIZABETH DAIL (00767909) on 04/12/2011 at 10:54:48 (EST)
Employee went out on LWOP on 01/10/11.

9.   Press ✅ Enter.

10.   Click 🖫 Save.

NOTE: If you get the below 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 April 23, 2012
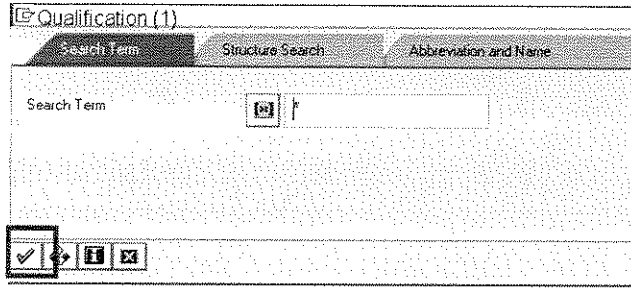
For employees that were NOT in Beacon SAP at the time Cycle 24 opened for direct entry (approximately April 23rd), additional steps are necessary in order to enter a performance status code. Specifically, the "Qualification" tab on the "Change Profile" screen may be blank (i.e. no performance cycle dates, 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.
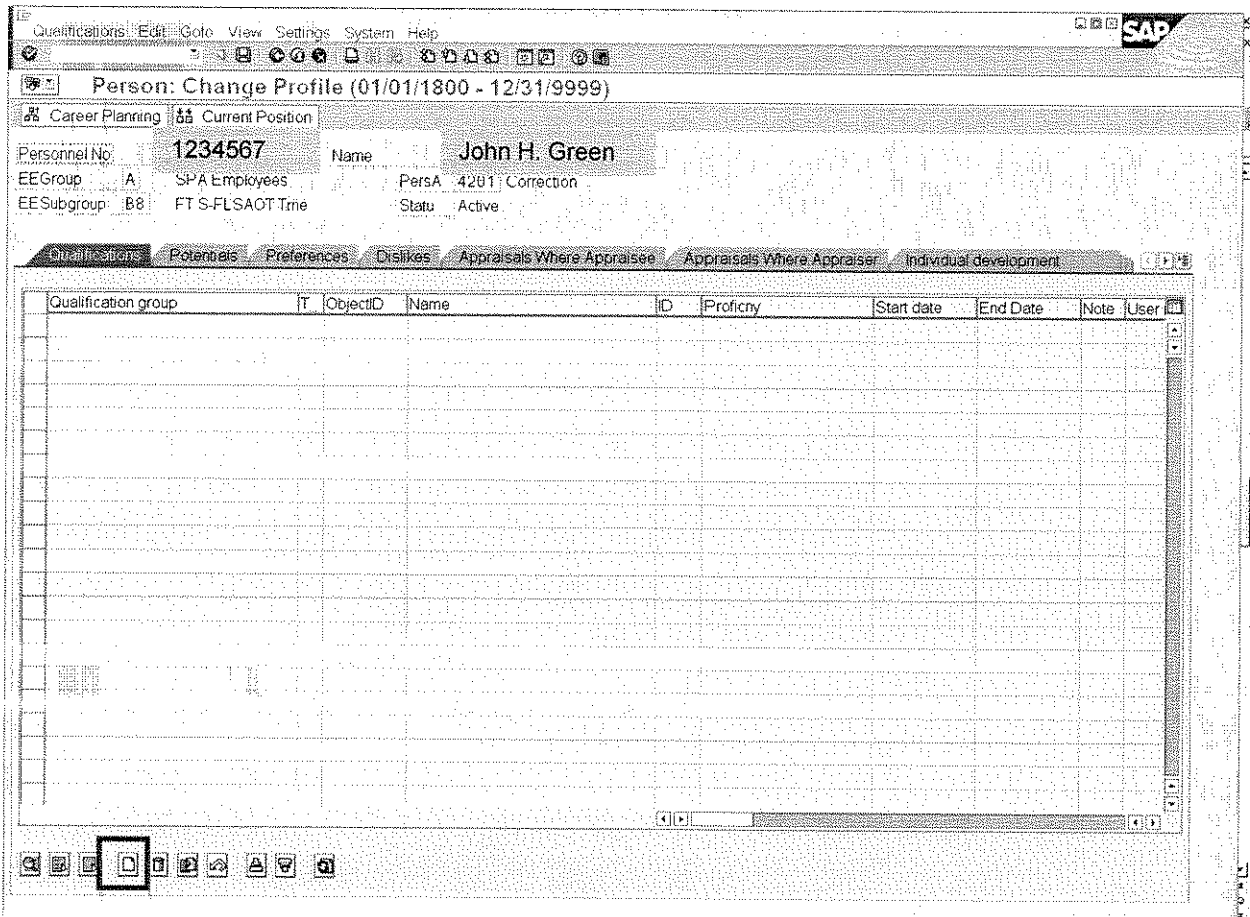
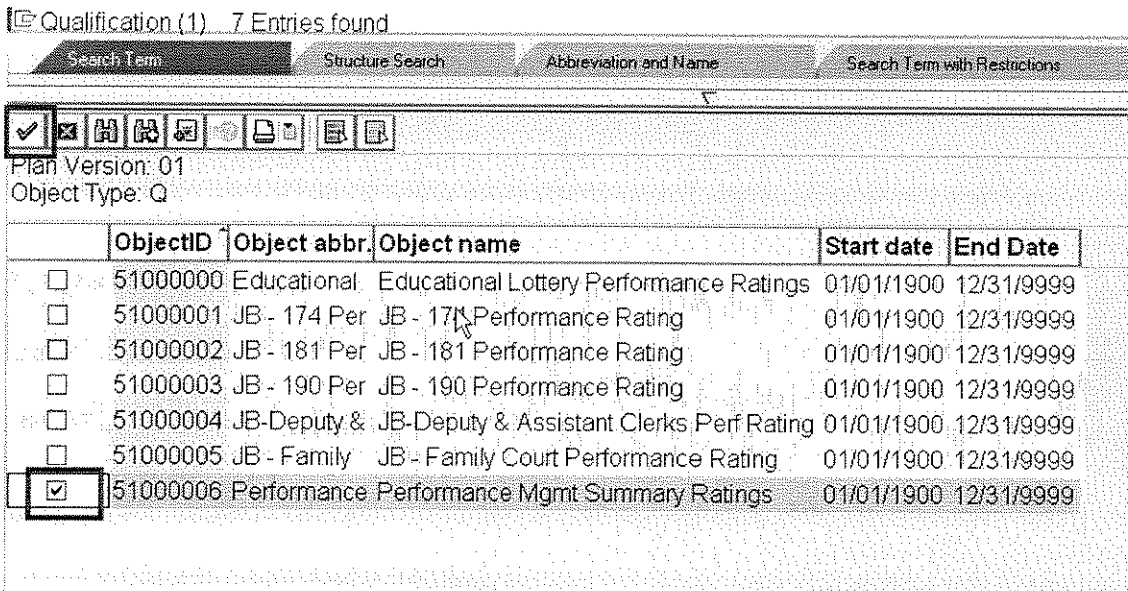2. The following **"Qualification"** pop-up will appear. Click ✓ Continue.

```
Qualification (1)
┌─────────────┬──────────────────┬─────────────────────┐
│ Search Term │ Structure Search │ Abbreviation and Name│
└─────────────┴──────────────────┴─────────────────────┘

Search Term        [⊞] |


✓  ⇨  ⓘ  ☒
```

3. When the next **"Qualification"** pop-up appears, click to select **"Performance Mgmt Summary Ratings"** and then click ✓ Continue.
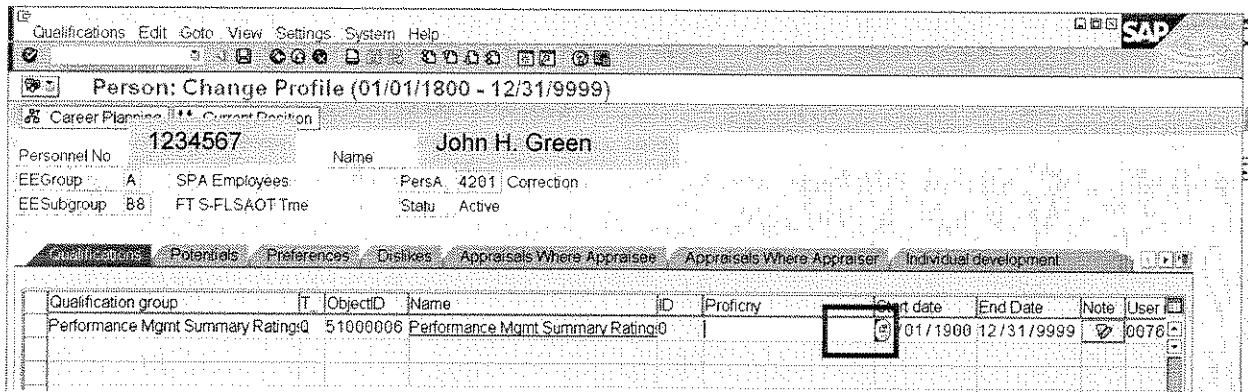
```
Qualification (1)   7 Entries found
┌─────────────┬──────────────────┬──────────────────────┬────────────────────────────┐
│ Search Term │ Structure Search │ Abbreviation and Name│ Search Term with Restrictions│
└─────────────┴──────────────────┴──────────────────────┴────────────────────────────┘

✓  ☒  🔍 🔍 🔍   📋  📊 📊

Plan Version: 01
Object Type: Q
```

	ObjectID	Object abbr.	Object name	Start date	End Date
☐	51000000	Educational	Educational Lottery Performance Ratings	01/01/1900	12/31/9999
☐	51000001	JB - 174 Per	JB - 174 Performance Rating	01/01/1900	12/31/9999
☐	51000002	JB - 181 Per	JB - 181 Performance Rating	01/01/1900	12/31/9999
☐	51000003	JB - 190 Per	JB - 190 Performance Rating	01/01/1900	12/31/9999
☐	51000004	JB-Deputy &	JB-Deputy & Assistant Clerks Perf Rating	01/01/1900	12/31/9999
☐	51000005	JB - Family	JB - Family Court Performance Rating	01/01/1900	12/31/9999
☑	51000006	Performance	Performance Mgmt Summary Ratings	01/01/1900	12/31/9999

4. When you return back to the **"Change Profile"** screen, click in the **"Proficiency"** column to select the 🗗 matchcode.

```
Qualifications  Edit  Goto  View  Settings  System  Help                        SAP

Person: Change Profile (01/01/1800 - 12/31/9999)

Career Planning   Current Position

Personnel No    1234567         Name      John H. Green
EEGroup    A    SPA Employees         PersA   4201  Correction
EESubgroup 88   FT S-FLSAOT Tme       Statu   Active
```

| Qualifications | Potentials | Preferences | Dislikes | Appraisals Where Appraisee | Appraisals Where Appraiser | Individual development |

Qualification group	T	ObjectID	Name	ID	Proficny	Start date	End Date	Note	User
Performance Mgmt Summary Rating	Q	51000006	Performance Mgmt Summary Rating	0		01/1900	12/31/9999		0076

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

ID	Proficny
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

✔ Description ✖

6. 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

7. The Start and End dates need to be changed to reflect the Cycle 24 timeframe. To update the **"Start Date,"** click in the **"Start Date"** field and change the value to **"07/01/2011."** To update the **"End Date,"** click in the **"End Date"** field and change the value to **"06/30/2012."**

Note: **Please be sure to ONLY enter the Cycle 24 timeframe of 07/01/2011 to 06/30/2012 in the "Start" and "End" date fields. If you enter an incorrect date, something different than 07/01/2011 to 06/30/2012, 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.**

8. 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 .

9. Press ✔ Enter.

10. Click ⊟ Save.

11. 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.
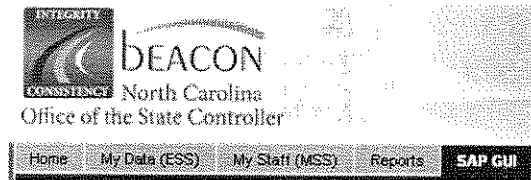
3. Type "PA20" in the command field of the SAP Easy Access Window and press Enter to go to the "Display HR Master Data" screen.
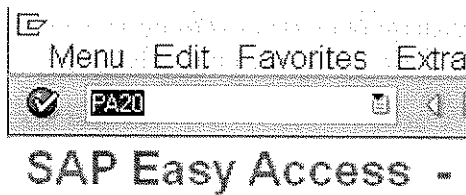
Display HR Master Data Screen (PA20):

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.
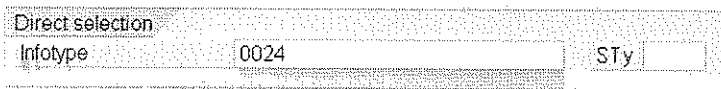
6. Press Enter to ensure you are viewing the correct employee and the Qualifications Infotype will display.

7. Click the Display icon to take you to the "Person – Display Profile" screen.

Person – Display Profile Screen:

Personnel No	95311133	Name	Buddy Shane Cabanes
EEGroup	P SPA Bi-Weekly	PersA 1501 Transportation
EESubgroup B1	FT S-FLSAOT Perm	Statu Active

| Qualifications | Potentials | Preferences | Dislikes | Appraisals Where Appraisee | Appraisals Where Appraiser |

Qualification group	T	ObjectID	Name	ID	Proficny	Start date	End Date	Note	U
Performance Mgmt Summary Ra Q		51000006	Performance Mgmt Summary Ra	4	VERY GOOD	07/01/2006	06/30/2007		01
Performance Mgmt Summary Ra Q		51000006	Performance Mgmt Summary Ra	5	OUTSTANDING	07/01/2007	06/30/2008		01
Performance Mgmt Summary Ra Q		51000006	Performance Mgmt Summary Ra	4	VERY GOOD	07/01/2008	06/30/2010		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 a **"Very Good"** rating for the **07/01/2008 to 06/30/2009** *(Cycle 21)* performance cycle. This employee also received a **"Very Good"** rating for the **07/01/2009 to 06/30/2010** *(Cycle 22)* performance cycle. Therefore, when the Cycle 22 "Very Good" rating was entered and "Saved," since the performance rating code was the same for both years, those cycle dates collapsed and combined to **07/01/2008 to 06/30/2010**.

Correcting/Changing Performance Ratings in SAP

Please be advised that you will be able to make corrections and/or changes to a Cycle 24 rating/status code **IF and ONLY IF** the Cycle 24 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 24.

If the Cycle 24 timeframe did NOT combine with previous cycles (i.e. "Start" and "End" date is 07/01/2011 to 06/30/2012), you will be able to correct the Cycle 24 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 24 (07/01/2011 to 06/30/2012). In the **"Proficiency"** column, click on the ⬚ matchcode.

The following pop-up will appear:

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.