

## Shared Leave Cross Agency Donation

Transaction Code:  
PA30

**Purpose** Use this procedure to donate shared leave when the donor and the recipient work at different agencies.

**Trigger** Perform this procedure when one employee is donating shared leave to another employee within a different agency.

**Prerequisites**

- Absence Quota balance exists for the donating employee.
- If the donating employee would like to donate their Personal Holiday, it must be converted into an hourly amount first.
  - See the procedure **Personal Holiday Convert into Hours**.
- Both employee's have eligibility established.
  - See the procedure **Shared Leave Establish Eligibility** procedure.

**End User Roles** Payroll Processor, Leave Corrections Processor

Change History	Change Description
12/10/2009	Created
5/13/2010	Added note and Steps 19-25

**Menu Path** Human Resources → Personnel Management → Administration → HR Master Data → Maintain

**Transaction Code** PA30

<b>Helpful Hints</b>	Payroll Processors and Leave Corrections Processors will use the <b>Attendance System Change Report (ZHR_RPTTM084)</b> to verify received, donated and returned quota balances.
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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
<b>Error</b> 	<b>Example:</b>  Make an entry in all required fields. <b>Action:</b> Fix the problem(s) and then click  (Enter) to validate and proceed.
<b>Warning</b> 	<b>Example:</b>  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. <b>Action:</b> If an action is required, perform the action. Otherwise, click  (Enter) to validate and proceed.
<b>Confirmation</b>  or 	<b>Example:</b>  Save your entries. <b>Action:</b> Perform the required action to proceed.

## Procedure

### Scenario:

An employee (the **donor**) would like to donate 25 hours of annual leave to another state worker who works in another agency (the **recipient**).

Both the donor and the recipient have their eligibility established on their **Absence Pool (0696)**

Both the donor and the recipient have their **Based Rate** established

1. Start the transaction using the above menu path or transaction code **PA30**.

The screenshot shows the 'Maintain HR Master Data' window in a software application. The window title is 'Maintain HR Master Data'. The menu bar includes 'HR master data', 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. The toolbar contains various icons for file operations and navigation. The search sidebar on the left has 'Find by' options: 'Person', 'Collective search', 'Search Term', and 'Free search'. The main data area shows the following information:

- Personnel no.: 40000132
- Name: COINS CLAIRE
- PersArea: 5400
- Employment Security Dept: EEGroup 0 Permanent
- PSubarea: 00FT
- Agencywide: EESubgroup 05
- H-OT Elig>40hrs/wk
- Status: Active

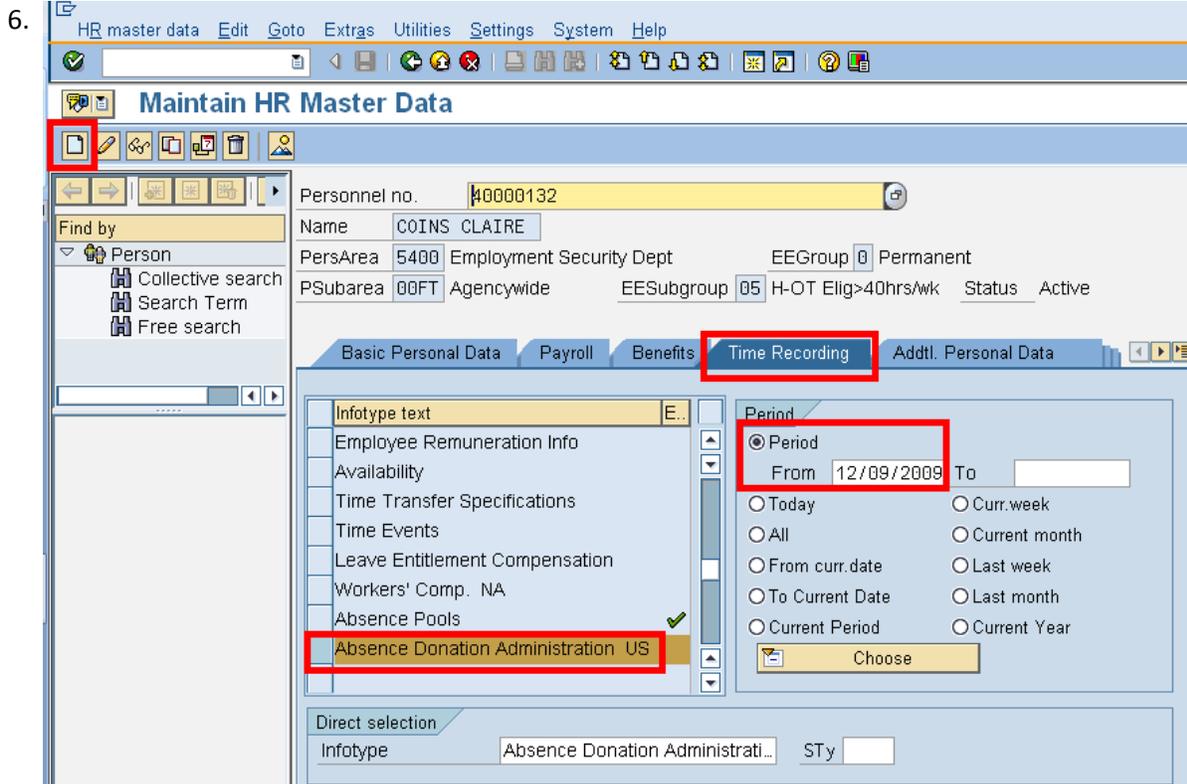
Below the data area are tabs for 'Basic Personal Data', 'Payroll', 'Benefits', 'Time Recording', and 'Addtl. Personal Data'. A list of data categories is shown on the left, with checkmarks indicating which are active. The 'Period' selection panel on the right has radio buttons for 'Today', 'Curr.week', 'All', 'Current month', 'From curr.date', 'Last week', 'To Current Date', 'Last month', 'Current Period', and 'Current Year'. A 'Choose' button is also present.

2. 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.   Enter the <b>donor's</b> personnel number  <b>Example:</b> 40000132

Period	R	<p>Enter the effective date of the donation into the From Date field.</p> <p> The date should be the start date that the <b>Recipient</b> was made eligible to receive Shared Leave.</p> <p> If a date is not entered on this screen, the system will not display the <b>donor's</b> current quota balance.</p> <p> By entering the effective date here, it will be carried over to the <i>Absence Donation Administration (0613)</i> Infotype</p> <p><b>Example:</b> 12/9/2009</p>
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3. Click  (Enter) to validate the information. Verify you have accessed the correct employee record.
4. Click the  tab to select.
5. Select the blue box to the left of  to select



7. Click  (Create) to donate leave to the RECIPIENT of shared leave. Select **0001 Donation/Return** from the pop up window

8. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Abs. quota type	R	It is a specific absence quota that is being donated by the <b>Donor</b> .  If an employee would like to donate their Personal Holiday, it must be converted into an hourly amount first. See the procedure <b>Personal Holiday Convert into Hours</b> . <b>Example:</b> Annual Leave
Number/Unit	R	Enter the number of hours that are being donated to the recipient. <b>Example:</b> 25
External Recipient	R	Check this box.

Ext. Person	R	The <b>recipient's</b> personnel number <b>Example:</b> 40000001
Absence Quota Type	R	This is a text field, type the quota type recipient is receiving: <b>Example: Shared Leave</b>

Infotype Edit Goto Extras System Help

Create Absence Donation Administration US(0613)

Personnel No 40000132 Name CO1  
 EE group 0 Permanent Personnel ar 540  
 EE subgroup 05 H-OT Elig>40hrs/... SSN 501-50-5082  
 Start 12/09/2009

Absence Donation Administration US  
 Abs. quota type 31 Annual Leave/Vacation (1...  
 Number/Unit 25.00 Hours

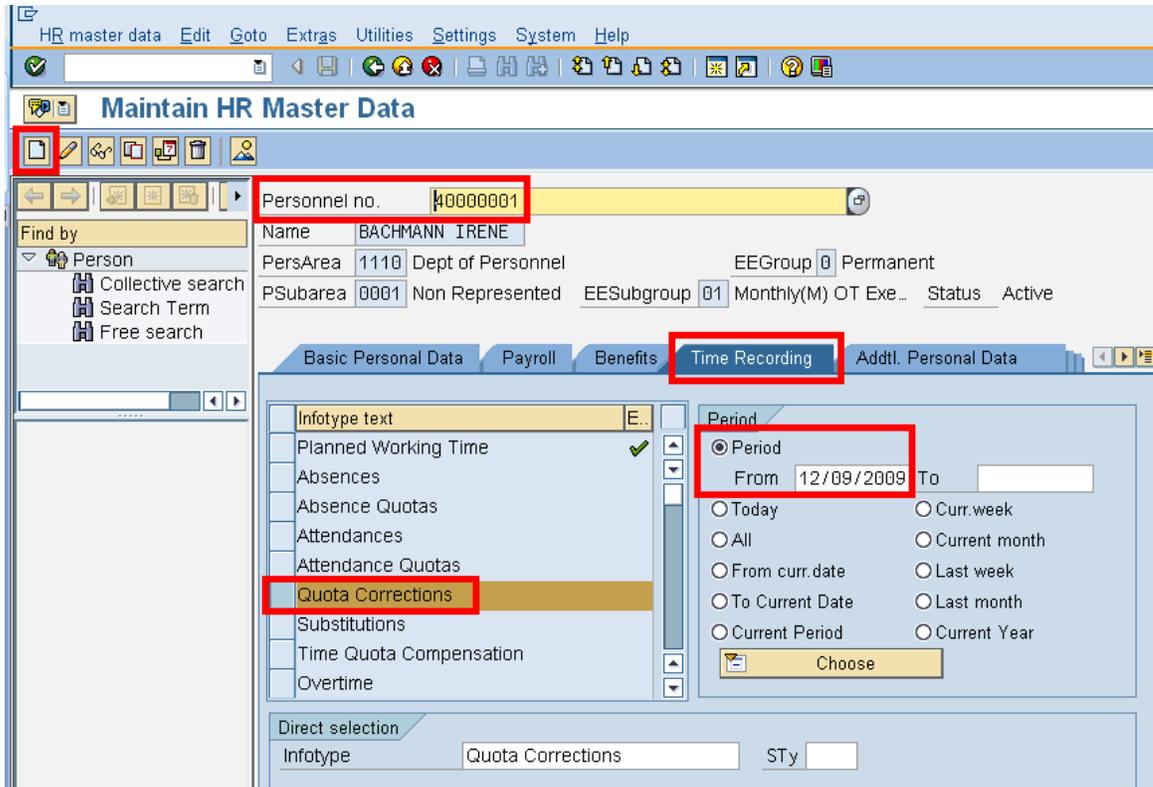
External Recipient  
 Ext. Person 40000001  
 Absence Quota Type SHARED LEAVE

9. Click (Enter) to validate the information.

10. Click (Save) to save.

HRMS will automatically create a *Time Quota Compensation (0416)* for the donor to reduce their quota balance by the donated amount.

If your employee is the **recipient**, you will need to manually create a *Quota Correction (2013)* to increase the **recipients** Shared Leave Quota balance.  
Use the Transaction code **PA30** to access the Maintain HR Master Data



11. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Personnel Number	R	The employee's unique identifying number.  Enter the <b>recipients</b> personnel number <b>Example:</b> 40000001
Period	R	Enter the effective date of the donation. <b>Example:</b> 12/9/2009

12. Click  (Create) to donate leave to the **RECIPIENT** of shared leave.

13. Select **2** **15** **41** Shared Leave from the pop up

14. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Quota Number	R	<p>The actual hours being donated from the donor</p> <p> You <b>must</b> first do a manual calculation to determine the amount of shared leave donated by the donor based on their hourly base rate. Follow the Office of Financial Management calculation.</p> <p><b>Example:</b> 50</p>
Increase generated entitlement	R	Verify this radio button is selected
Transfer	R	<p>Quota transfer</p> <p><b>Example:</b> Transfer collected entitlement immediately</p>

15. Click  (**Save**) to save entries.

16. Run the **Time Evaluation (ZT60)** to transfer the donated time to the **recipient**

17. Enter **/NZT60** into the command field

18. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Personnel Number	R	The employee's unique identifying number.   Enter the <b>recipients</b> personnel number  <b>Example:</b> 40000001

19. Click  (Execute) to generate the Time Evaluation

Log: Time Evaluation	
General data	
Successful personnel numbers	
Personnel numbers with errors	
Personnel numbers ended early	
Personnel Numbers Rejected	
Messages	
Statistics	
Selected personnel numbers	1
Successful runs for	1
including with errors	0
Processing not completed for	0
Rejected	0
Total number of messages and error messages	0



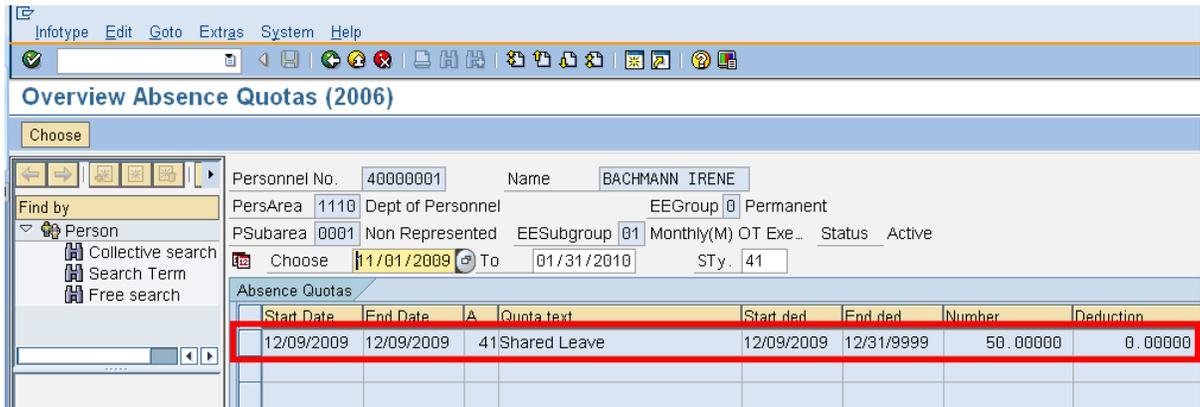
To verify the **Recipients** Shared Leave quota balance, access their **Absence Quotas (2006)**

20. Enter **/NPA20** into the command field:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Personnel Number	R	The employee's unique identifying number.  Enter the <b>recipients</b> personnel number <b>Example:</b> 40000001

15. Click the **Time Recording** tab to select.
16. Select the blue box to the left of **Absence Quotas** to select.
17. Select the  **All** to view all records created.
18. Enter quota type **STy 41 Shared Leave** to narrow the search results.

19. Click  (overview) to display all records.



Start Date	End Date	A	Quota text	Start ded	End ded	Number	Deduction
12/09/2009	12/09/2009	41	Shared Leave	12/09/2009	12/31/9999	50.00000	0.00000



If **returning Sick Leave** from a **prior year**, the **original donors'** agency will need to create a **Text Note** on the **donors Quota Correction (2013)**.

By creating this text note on the **Quota Corrections (2013)** the sick leave will be included in the **donors** sick leave balance but the employees current Year To Date Sick Leave Earned not be impacted.

**Example:**

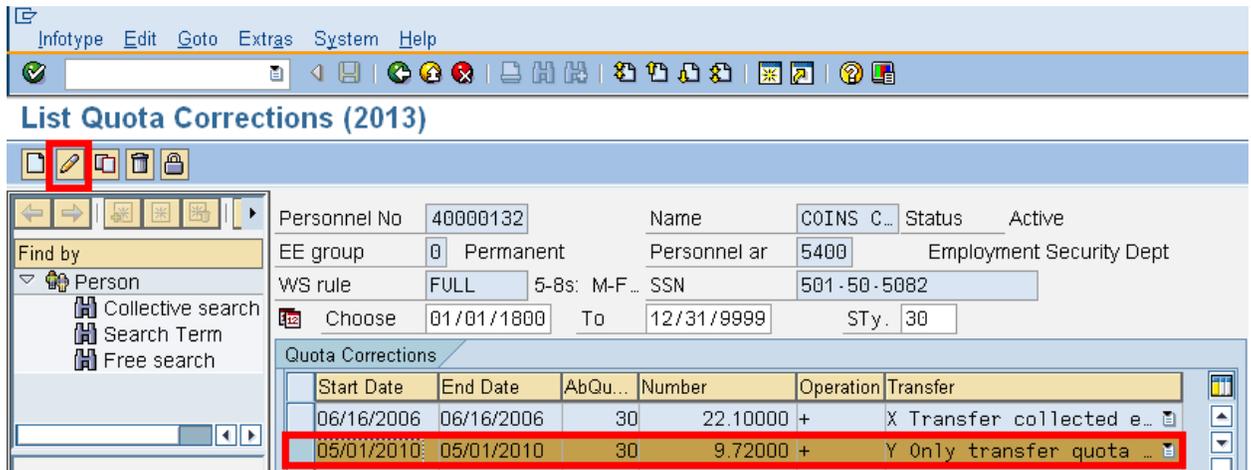
You need to process a shared leave return that will return sick leave to an employee who donated **Sick Leave** in 2009.

You create the **Absence Donation Administration (0613)** record for the employee returning the sick leave with an effective date of **5/1/2010**. You create the **Quota Correction (2013)** record to manually increase the hours being returned to the recipient (**original donor**). The recipient is the employee who donated the leave back in **2009**.

You are returning 10 hours of **sick leave** to the recipient (**original donor**). The recipient has taken 40 hours of sick leave in 2010 and has at least 480 hours **sick leave** balance.

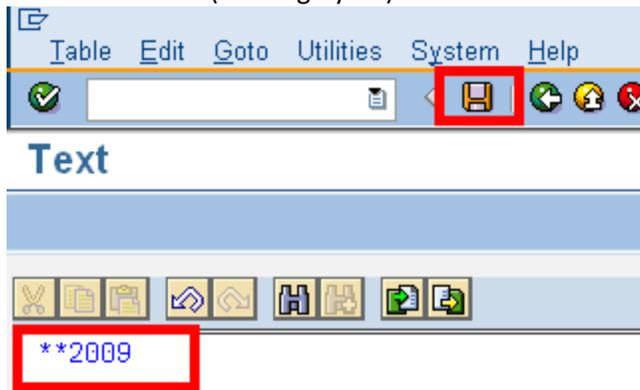


Access the **Quota Corrections (2013)** record that was during the return to add the note:



20. Select the **Quota Correction (2013)** that pertains to prior year donation

21. Click  (Change) to add the **Text Note**
22. Go to the **Menu bar-Edit- Maintain Text** (or press F9)
23. Enter the **\*\*YYYY**(four digit year)



24. Click  (Save) to save text note
25. You have completed this transaction.

**Results**

You have donated shared leave from one employee to another within the different agencies.