# **Shared Leave Cross Agency Donation**

Transaction Code: PA30

- PurposeUse this procedure to donate shared leave when the donor and the recipient work<br/>at different agencies.
- TriggerPerform this procedure when one employee is donating shared leave to another<br/>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 $\rightarrow$ Personnel Management $\rightarrow$ Administration $\rightarrow$ HR Master Data	
	→ Maintain	

#### Transaction Code PA30

Helpful Hints	Payroll Processors and Leave Corrections Processors will use the Attendance			
	System Change Report (ZHR_RPTTM084) to verify received, donated and returned			
	quota balances.			



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	<b>Example</b> : Nake an entry in all required fields. <b>Action</b> : Fix the problem(s) and then click <i>(Enter)</i> to validate and proceed.
Warning ①	Example: O 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	Example: Save your entries. Action: 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**.

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🕫 🛛 Maintain HR	Master Data
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Person	PersArea 5400 Employment Security Dept EEGroup 0 Permanent
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	Contract Elements
	Date Specifications
	Family/Related Person

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
		Example: 40000132



Period	R	Enter the effective date of the donation into the From Date field. The date should be the start date that the <b>Recipient</b> was made eligible to receive Shared Leave. If a date is not entered on this screen, the system will not display the <b>donor's</b> current quota balance. By entering the effective date here, it will be carried over to the <i>Absence Donation Administration (0613)</i> Infotype
		Example: 12/9/2009

- 3. Click (Enter) to validate the information. Verify you have accessed the correct employee record.
- 4. Click the Time Recording tab to select.
  - 5. Select the blue box to the left of Absence Donation Administration US to select



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- 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:

ŀ	R=Require	ed Entry O=Optional Entry C=Conditional Entry
Field Name	R/O/C	Description
Abs. quota type	R	<ul> <li>It is a specific absence quota that is being donated by the Donor.</li> <li>If an 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.</li> <li>Example: Annual Leave</li> </ul>
Number/Unit	R	Enter the number of hours that are being donated to the recipient. Example: 25
External Recipient	R	Check this box.



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

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Image: Second Secon	Personnel No       40000132       Name       C01         EE group       0       Permanent       Personnel ar       540       Donor's       lyment Security Dept         EE subgroup       05       H-OT Elig>40hrs/       SSN       501 - 50 - 5082       Active         Start       12/09/2009       Image: Construction of the security of t				
	Absence Donation Administration US       Abs.quota type     31 Annual Leave/Vacation ( 1 In Number/Unit       Number/Unit     25.00				
	O Home Pool Home Pool ID O Foreign Pool Foreign Pool ID O Employee Personnel no. Target Abs. quota ● External Recipient Ext. Person 40000001 Absence Quota Type SHARED LEAVE				

Click 🧖 (Enter) to validate the information.

10.

9.

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  $\ensuremath{\textbf{PA30}}$  to access the Maintain HR Master Data

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	Infotype text       E         Planned Working Time <ul> <li>Period</li> <li>From 12/09/2009</li> <li>Curr.week</li> <li>Absence Quotas</li> <li>O Today</li> <li>Current month</li> <li>From curr.date</li> <li>Last week</li> <li>To Current Date</li> <li>Current Year</li> <li>Choose</li> </ul> Direct selection <ul> <li>Direct selection</li> </ul>
	Infotype Quota Corrections STy

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 recipients personnel number
		Example: 40000001
Period	R	Enter the effective date of the donation.
		Example: 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

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Quota Number	R	The actual hours being donated from the donor
		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. <b>Example</b> : 50
Increase generated entitlement	R	Verify this radio button is selected
Transfer	R	Quota transfer
		Example: Transfer collected entitlement immediately

### 14. Complete the following fields:



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A Free search	Absence quota type 41 Shared Leave						
	Change accrual entitlement						
	Quota number 50 Hours						
	Increase generated entitlement						
	Change transfer time						
	Transfer X Transfer collected entitlement immediat						

- 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:

F	R=Require	d Entry O=Optional Entry C=Conditional Entry
Field Name	R/O/C	Description
Personnel Number	R	The employee's unique identifying number.
		Example: 40000001



	C Program Edit Goto System Help
	HR TIME: Time Evaluation
	Further selections
	Selection
	Personnel Number \$0000001 C
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	☐ Stop at fixed positions in time evaluation
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19.	Click Click (Execute) to generate the Time Evaluation
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	Log: Time Evaluation
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	Successful personnel numbers Personnel numbers with errors
	Personnel numbers ended early
	Personnel Numbers Rejected
	☐ ☐ Statistics
	Selected nersonnel numbers 1
	Successful runs for 1
	including with errors 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.
		Example: 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 OAll 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.

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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:

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	Start Date End Date AbQu Number Operation Transfer					
	06/16/2006 06/16/2006 30 22.10000 + X Transfer collected e… 🗈 🔺					
	05/01/2010 05/01/2010 30 9.72000 + Y Only transfer quota 🔤 🗹					

- 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.

