Shared Leave Returning Donation

Transaction Code:
PA30

Purpose	Use this procedure to return donated quota to an employee that was unused by the Recipient
Trigger	Perform this procedure when the Recipient of shared leave has excess leave to return to the donors.
Prerequisites	• Verify the type of donated quota (annual/sick) that should be returned to the donor.
End User Roles	Payroll Processor, Leave Corrections Processor

Change History	Change Description
8/26/2006	Updates
5/6/2009	Screen shots updated to match current system. Steps on running Time Evaluation added.
3/9/2010	Updated step 5. Removed word *donation* and replaced with *date of return*
5/11/2010	Added steps **20-24** on how to create specifically formatted text note when returning **Sick Leave** from prior year
Menu Path	Human Resources → Personnel Management → Administration → 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	**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 **PA30**.

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 **recipients** personnel number **Example**: 40000200

3.   Click ![Enter icon] (Enter) to validate the information. Verify you have accessed the correct employee record.

4.   Click the **Time Recording** tab to select.

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5.   Enter the date of the return.

   ![i] If a date is not entered on this screen, the system will not display the **recipient's** current quota balance.

6.   Select the blue box to the left of `Absence Donation Administration  US` to select

7.
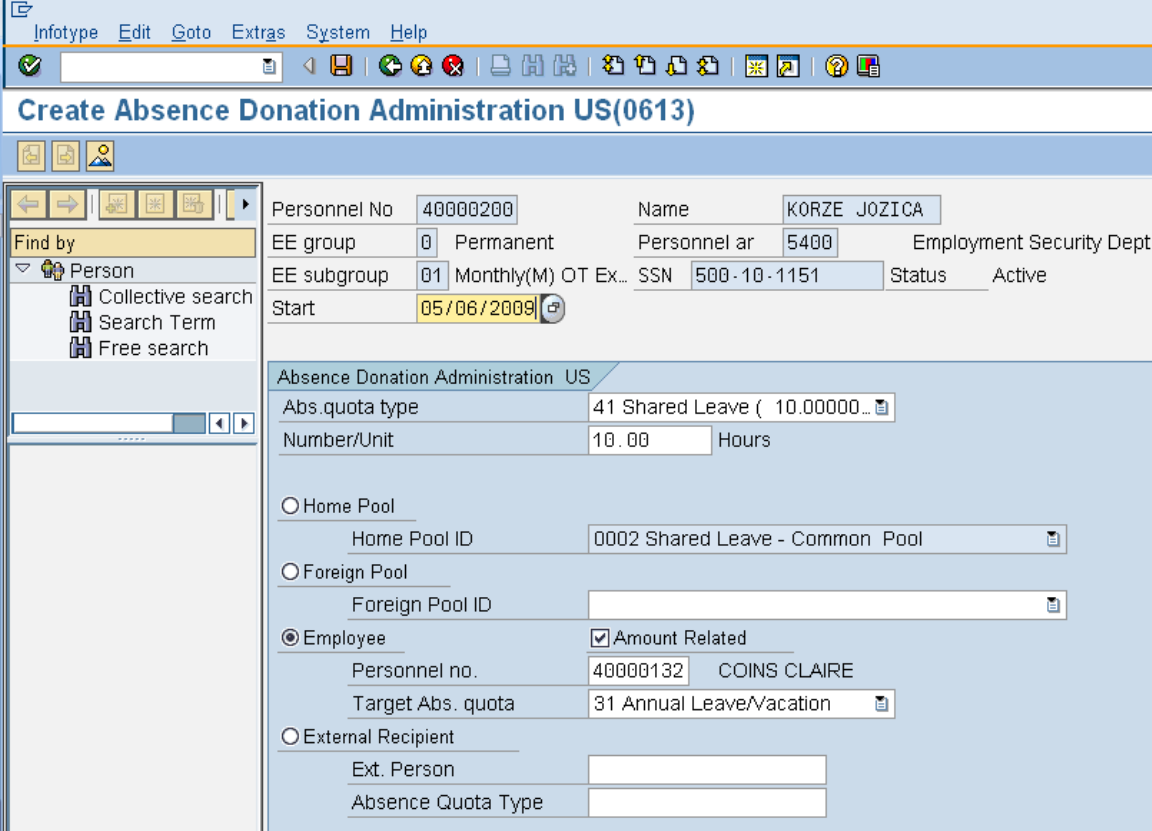
8.   Click ☐ (Create) to return unused Shared Leave to the donor. Select `0001 Donation/Return` from the pop up window

9. 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 returned by the **Recipient**. **Example:** Shared Leave
Number/Unit	R	Enter the number of hours that are being returned to the Donor **Example:** 10
Personnel no.	R	The employee's unique identifying number. ℹ️ Enter the **Donors** personnel number **Example: 40000132**
Amount Related	R	Check this box.

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		⚠️ If the amount related box is not checked, the base rate (salary/hourly amount) will not be considered into the hours calculation of Shared Leave. The system will donate the actual hours entered rather than calculate the base rate of each employee.
Employee	R	Check this radio button
Target Abs. quota	R	This is the Absence Quota (Leave Type) that an employee donates to (Shared Leave Quota) or receives back (the quota type that was donated). ⚠️ Select the leave type that was originally donated by the donor. **Example: Annual Leave**

Infotype Edit Goto Extras System Help

Create Absence Donation Administration US(0613)

Personnel No 40000200 Name KORZE JOZICA
EE group 0 Permanent Personnel ar 5400 Employment Security Dept
EE subgroup 01 Monthly(M) OT Ex… SSN 500-10-1151 Status Active
Start 05/06/2009

Find by
▽ 👥 Person
   Collective search
   Search Term
   Free search

Absence Donation Administration US
Abs.quota type 41 Shared Leave (10.00000…
Number/Unit 10.00 Hours

○ Home Pool
      Home Pool ID 0002 Shared Leave - Common Pool
○ Foreign Pool
      Foreign Pool ID
◉ Employee ☑ Amount Related
      Personnel no. 40000132 COINS CLAIRE
      Target Abs. quota 31 Annual Leave/Vacation
○ External Recipient
      Ext. Person
      Absence Quota Type

10.
    Click ✅ (Enter) to validate the information.

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11.
Click ⊞ (Save) to save.

⚠️ To return the leave back to the donor run the **Time Evaluation (ZT60)**

12. 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. ℹ️ Enter the **donors** personnel number **Example**: 40000132

13. Click 🕒 (Execute) to run the **Time Evaluation.**

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To verify the leave returned to the original **Donor,** access their **Absence Quotas (2006)**

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

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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 **donor's** personnel number **Example**: 40000132

15. Click the **Time Recording** tab to select.

16. Select the blue box to the left of **Absence Quotas** to select.
17. Enter date of return.

18. Enter quota type **STy 31 Annual Leave/Vacation** (Select the quota type that was originally donated by the donor) to narrow the search results.

19. Click (overview) to display all records.

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Our recipient returned 10 of unused Shared Leave to our donor yet the donor has a total of 8.33000 hours listed in the number column. This indicates that the recipients base rate is less than the donors. HRMS converts hours based on each employees' base rate.

If the **Amount Related** box is left unchecked on the *Absence Donation Administration (0613)* the system will donate the actual hours entered rather than calculate the base rate of each employee.

If you are returning **Sick Leave** from a **prior** year, you will need to create a **Text Note** on the original **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 Taken 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.** 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.
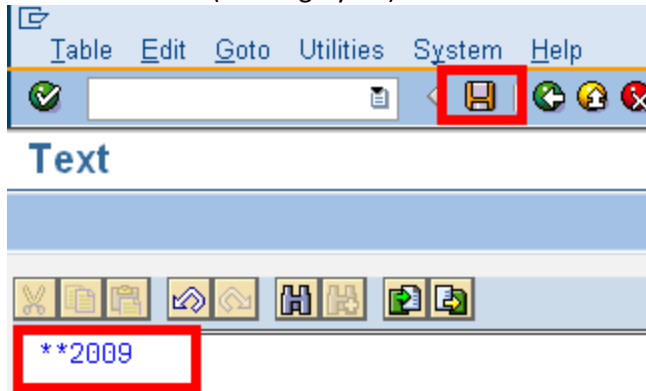
ⓘ Access the *Quota Corrections (2013)* record that was during the return to add the note:
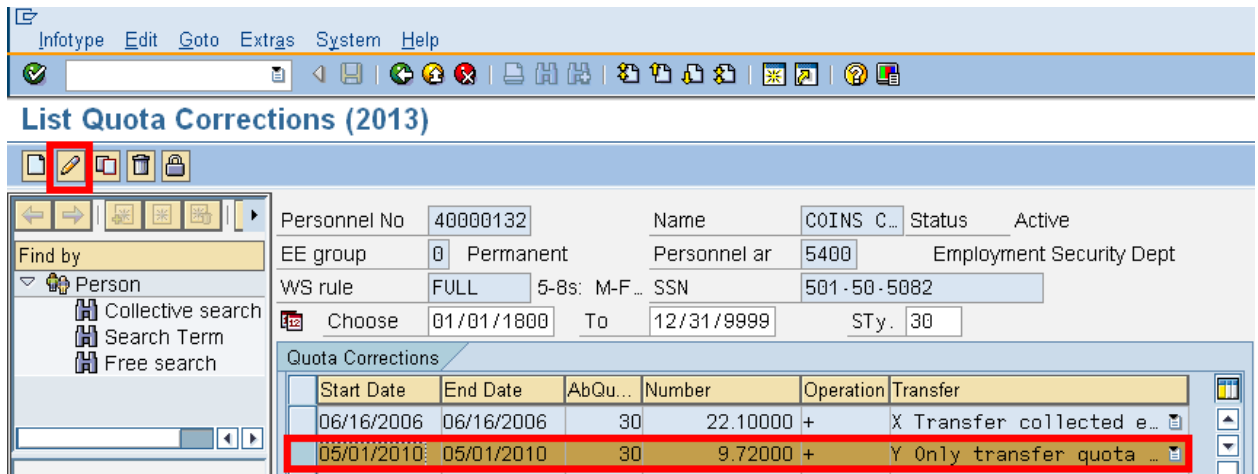
20. Select the **Quota Correction (2013)** that pertains to prior year donation
21. **Click** 🖉 (Change) to add the **Text Note**
22. Go to the **Menu** bar-**Edit**- **Maintain Text** (or press F9)
23. Enter the **YYYY(four digit year)

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

Results
You have returned unused leave back to the original donor.

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