

Shared Leave – Returning Donation Cross Agency










- Purpose** Use this procedure to return donated quota to an employee from another agency.
- Trigger** Perform this procedure when the Recipient of shared leave has excess leave to return back to donors from other agencies.
- Prerequisites** The Donor/Recipient are in different agencies.
- End User Roles** In order to perform this transaction you must be assigned the following role: Payroll Processor, Leave Corrections Processor.

Change History	
Date	Change Description
04/27/2012	Procedure Created

- 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.
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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
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.

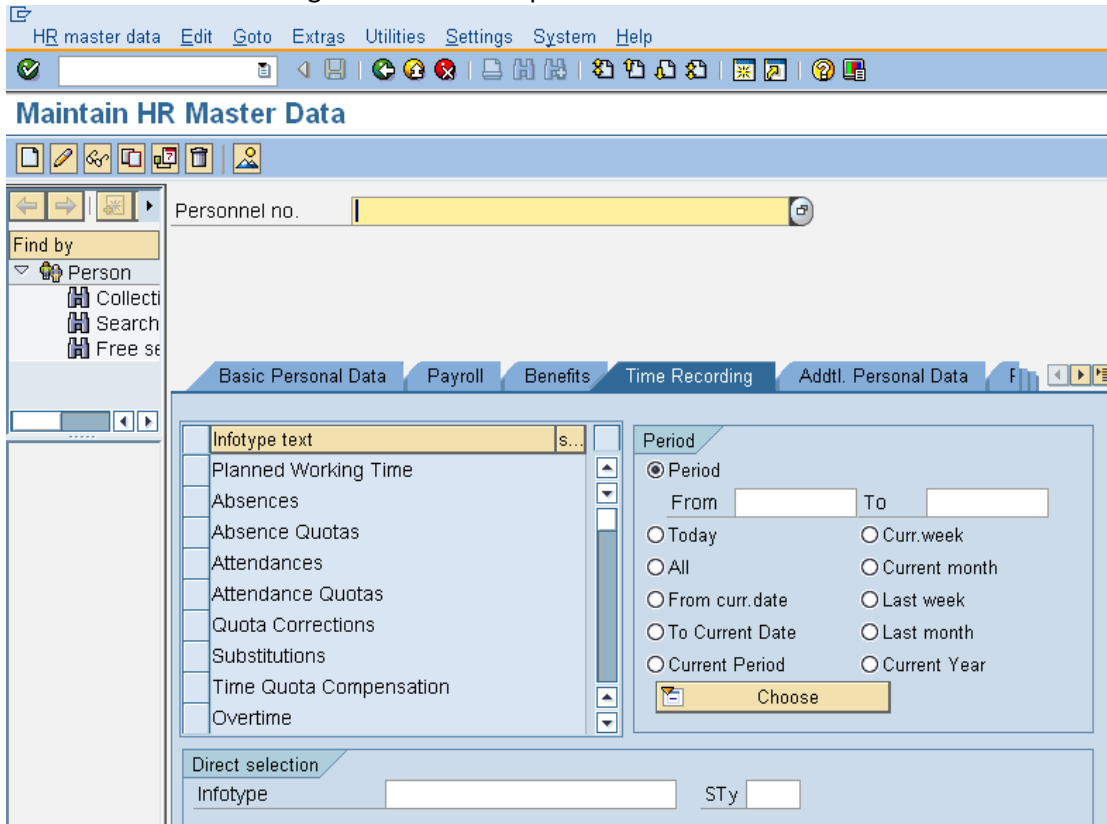
Scenario:

An employee within your agency received a donation for Shared Leave from another State employee who works in another agency.


Your employee is no longer in need of Shared Leave. You need to return the unused shared leave back to the donor from another agency.



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 Number	R	The employee's unique identifying number.  Enter the recipients personnel number Example: 40000225

3. Click  (Enter) to validate the information. Verify that you have accessed the correct employee record.
4. Click **Time Recording** tab to select.
5. Enter the **actual** date of the return in the **Period**.
 If a date is not entered on this screen, the system will not display the **recipients** current quota balance.
6. Select the box to the left of **Absence Donation Administration US** to select.

The screenshot shows the 'Maintain HR Master Data' application window. The 'Personnel no.' is 40000225 and the employee name is RUTKOWERSKI WESLEY. The 'Time Recording' tab is active. In the list of infotypes, 'Absence Donation Administration US' is selected with a checkmark. The 'Period' section shows 'From 05/01/2012' and 'To' is empty. Other options like 'Today', 'All', 'From curr. date', etc., are visible but not selected.

7. Click  (Create) to return the **unused** Shared Leave back to the donor.
8. Double click **0001 Donation/Return** from the *Subtypes for infotype "Absence Donation Administration US"*

Recipient Information

Personnel No: 40000225
 Name: RUTKOWSKI WESLEY
 EE group: 0 Permanent
 EE subgroup: 01 Monthly(M) OT Ex...
 Start: 05/01/2012

Donor's Information

Absence Donation Administration US
 Abs. quota type
 Number/Unit

Home Pool
 Home Pool ID: 0040 Shared Leave - Common Pool

Foreign Pool
 Foreign Pool ID: []


Employee
 Amount Relat
 Personnel no.: []
 Target Abs. quota: []


External Recipient
 Ext. Person: []
 Absence Quota Type: []


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 quota that is being returned by the Recipient . Example: Shared Leave
Number/Unit	R	Enter the number of hours being returned to the Donor from another agency. Example: 15
External Recipient	R	Select this radio button
Ext. Person	R	The Donor's Personnel number from another agency Example: 40000100
Absence Quota Type	R	Enter the name of the quota type that was originally donated by the donor .

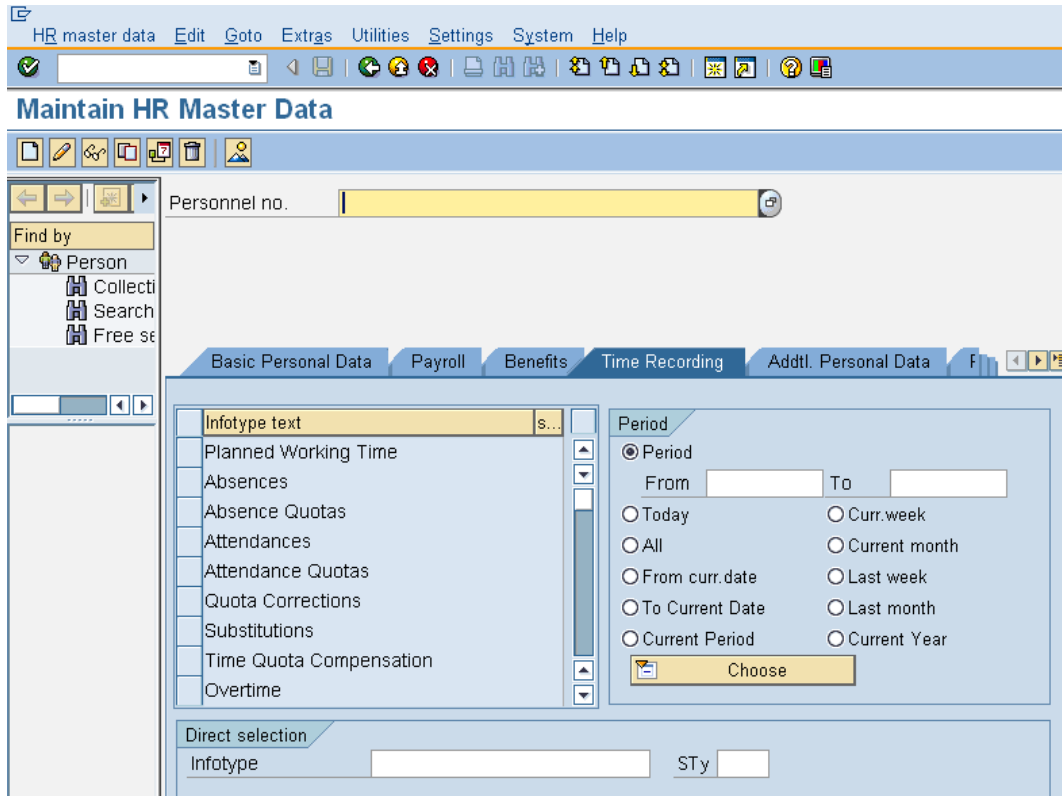
		Example: Vacation Leave
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10. Click  (Save) to save your entries.


 HRMS will automatically create a *Time Quota Compensation (0416)* for the **recipient** to reduce their **Shared Leave quota balance**.

 If your employee is the **original donor** you will need to manually create a **Quota Correction (2013)** to increase the **donor's** original donated quota balance.

11. Use the Transaction code **PA30** to access the **Maintain HR Master Data**.




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.  Enter the donors personnel number Example: 40000100
Period	R	Enter the date of the return Example: 5/1/2012

13. Select

The screenshot shows the 'Maintain HR Master Data' application window. At the top, there is a menu bar with 'HR master data', 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main window title is 'Maintain HR Master Data'. On the left, there is a 'Find by' sidebar with options like 'Person', 'Collecti', 'Search', and 'Free se'. The main area displays personnel information for 'SULLIVAN JAMES' with personnel number '40000100'. Below this, there are tabs for 'Basic Personal Data', 'Payroll', 'Benefits', 'Time Recording', and 'Addtl. Personal Data'. The 'Time Recording' tab is active, showing a list of 'Infotype text' items. 'Quota Corrections' is highlighted in the list. To the right of the list is a 'Period' selection area with radio buttons for 'Period', 'Today', 'All', 'From curr. date', 'To Current Date', 'Current Period', 'Curr. week', 'Current month', 'Last week', and 'Last month'. A 'Choose' button is also present. At the bottom, there is a 'Direct selection' section with an 'Infotype' field containing 'Quota Corrections' and an 'STy' field.

14. Click  (Create) to return the unused leave back to the donor.

15. Select the **donated** type of leave from the *Subtypes for infotype Quota Corrections*

Subtypes for infotype "Quota Corrections" (1) 17 E

Restrictions


ESG	PSG...	AQTyp	Quota text
2	50	30	Sick Leave
2	50	31	Vacation Leave
2	50	34	Jus. Excess Leave
2	50	35	Compensatory Time
2	50	37	Exchange Time
2	50	38	Military Leave
2	50	39	Holiday Credits
2	50	40	Excess Vacation Accrual
2	50	41	Shared Leave
2	50	42	Personal Holiday - Shift
2	50	43	Settl Leave WSP
2	50	44	Recognition Lv (PMC)
2	50	45	PH - Shared Lv. Donation
2	50	46	Sick Leave Pool
2	50	47	Uniformed Serv Lv Pool
2	50	48	Personal Leave Day
2	50	49	Temp Salary Reduction Lv.




Either **double click** on the leave type, or **select** and click



16. Complete the following fields:


R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Quota Number	R	Enter the hours being returned to the donor  You must first do a manual calculation to determine the amount of leave being returned based on the hourly base rate. Follow the Office of Financial Management calculation. Example: 10
Increase generated entitlement	R	Verify this radio button is selected
Transfer	R	Quota Transfer Example: Transfer collected entitlement immediately.

17. Click  (Save) to save entries.

18. Run the **Time Evaluation (ZT60)** to transfer the **returned** leave back to the donor.

19. Enter /Nzt60

20. 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.  The donors personnel number Example: 40000100

Program Edit Goto System Help


HR TIME: Time Evaluation

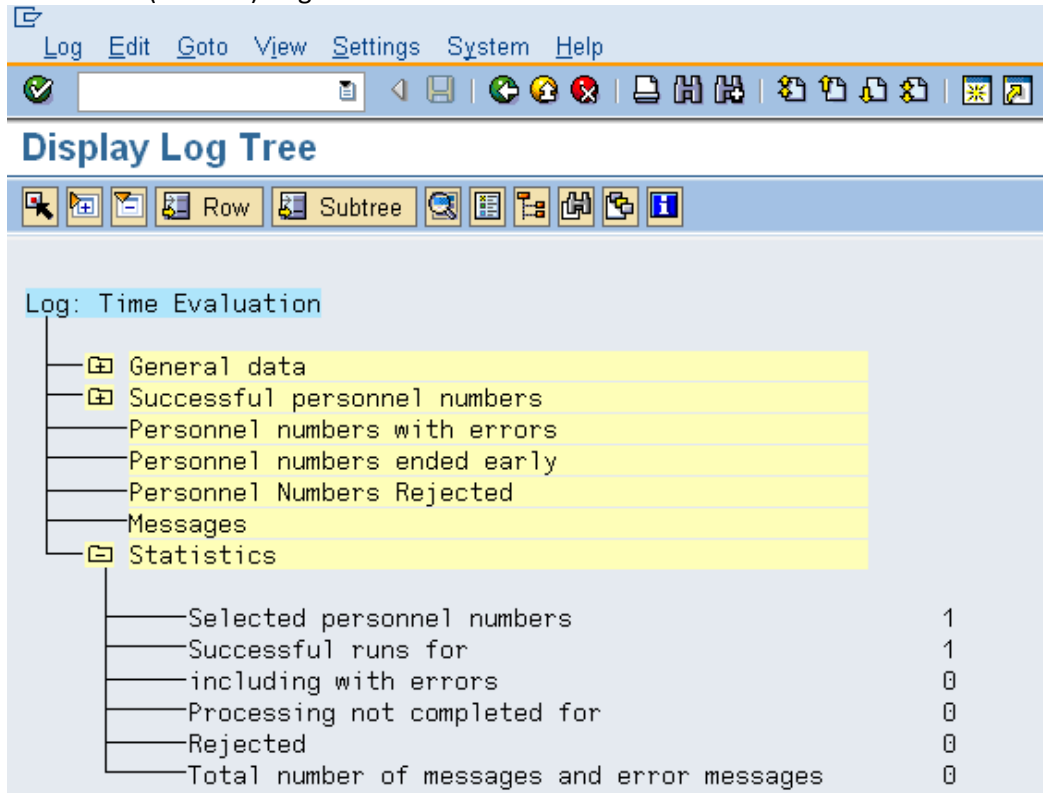
Further selections Search helps Sort order

Selection		
Personnel Number	40000100	↔
Personnel area		↔
Personnel subarea		↔
Payroll area		↔

Parameters for time evaluation	
Forced recalculation as of	
Evaluation up to	05/31/2012

Program options	
<input checked="" type="checkbox"/> Display log	
<input type="checkbox"/> Test run (no update)	
<input type="checkbox"/> Stop at function/operation BREAK	
<input type="checkbox"/> Stop at fixed positions in time evaluation	

21. Click  (Execute) to generate the Time Evaluation.



The screenshot shows a software window titled "Display Log Tree". The menu bar includes "Log", "Edit", "Goto", "View", "Settings", "System", and "Help". The toolbar contains various icons for file operations and navigation. Below the toolbar, there are buttons for "Row" and "Subtree". The main content area displays a log titled "Log: Time Evaluation" with a tree structure:

- 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

22. To verify the return- enter **/NPA20** into the commd field.

23. Select  tab.

24. Select the box to the left of  to select.

25. Enter the **date** of the return in the **period**.

26. Enter the quota type number in the **STY** field.

HR master data Edit Goto Extras Utilities Settings System Help

Display HR Master Data

Personnel no. 40000100
 Name SULLIVAN JAMES
 PersArea 3000 DSHS Headquarters EEGroup 0 Permanent
 PSubarea 00JE Econ/SocialSvcs EESubgroup 01 Monthly(M) OT Exe... Status Active

Basic Personal Data Payroll Benefits Time Recording Addtl. Personal Data

Infotype text s...
 Planned Working Time ✓
 Absences
Absence Quotas
 Attendances
 Attendance Quotas
 Quota Corrections
 Substitutions
 Time Quota Compensation ✓
 Overtime

Period
 Period
 From 05/01/2012 To
 Today Curr.week
 All Current month
 From curr.date Last week
 To Current Date Last month
 Current Period Current Year
 Choose

Direct selection
 Infotype Absence Quotas STY 31 Vacation Leave

27. Click  (Overview) to view quotas.


Infotype Edit Goto Extras System Help

Overview Absence Quotas (2006)

Choose

Personnel No. 40000100 Name SULLIVAN JAMES
 PersArea 3000 DSHS Headquarters EEGroup 0 Permanent
 PSubarea 00JE Econ/SocialSvcs EESubgroup 01 Monthly(M) OT Exe... Status Active
 Choose 05/01/2012 To 05/01/2012 STY 31

Start Date	End Date	A...	Quota text	Start ded.	End ded.	Number	Deduction	From
05/01/2012	05/01/2012	31	Vacation Leave	05/01/2012	12/31/9999	10.00000	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 will not be impacted.



Refer to the [HRMS Communication Archives section](#) and select **Jul-Dec 2009**, go to page 28 to view the *Updating Prior Year Quota Corrections for Sick Leave Buyout Reports and Statements Processing 12/17/2009*.

Results

You have successfully returned unused Shared Leave across agencies.
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