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:

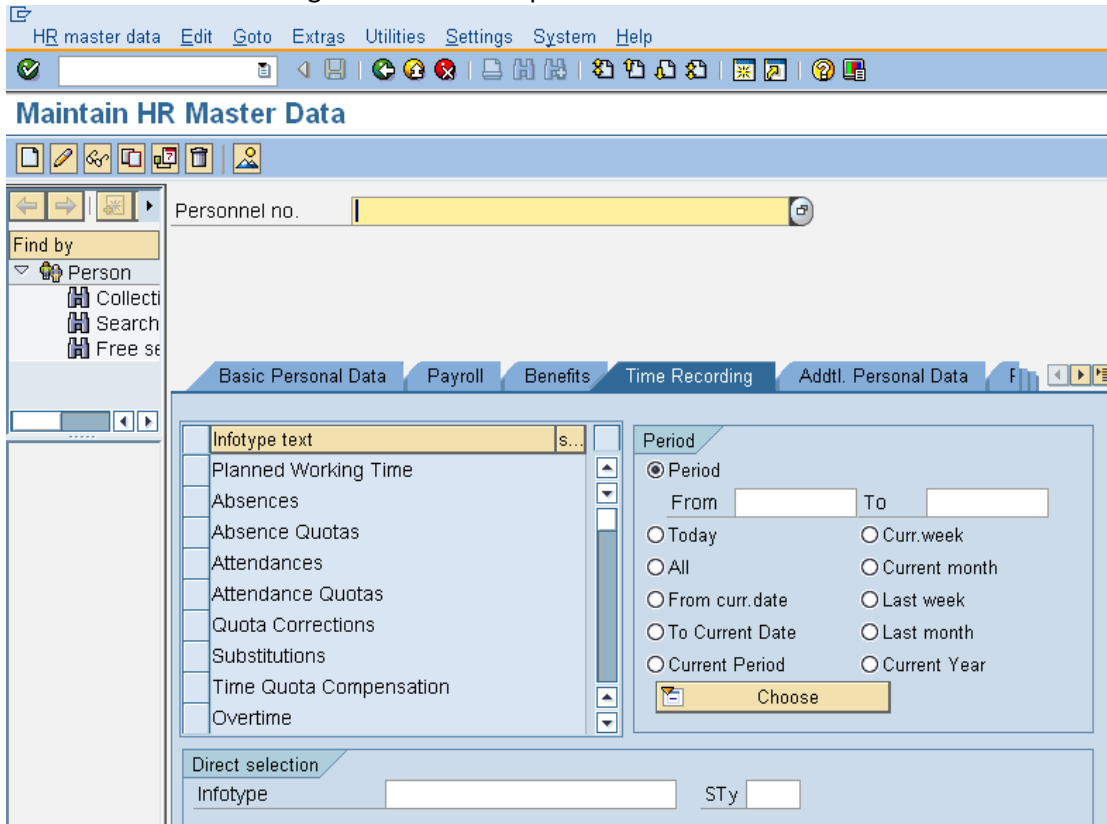| Message Type	Description
Error ❌	**Example**: ❌ Make an entry in all required fields. **Action**: Fix the problem(s) and then click ✅ (Enter) to validate and proceed.
Warning ⚠️	**Example**: ⚠️ Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. **Action**: If an action is required, perform the action. Otherwise, click ✅ (Enter) to validate and proceed.
Confirmation ℹ️ 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. ℹ️ 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.

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"*

9. Complete the following fields:

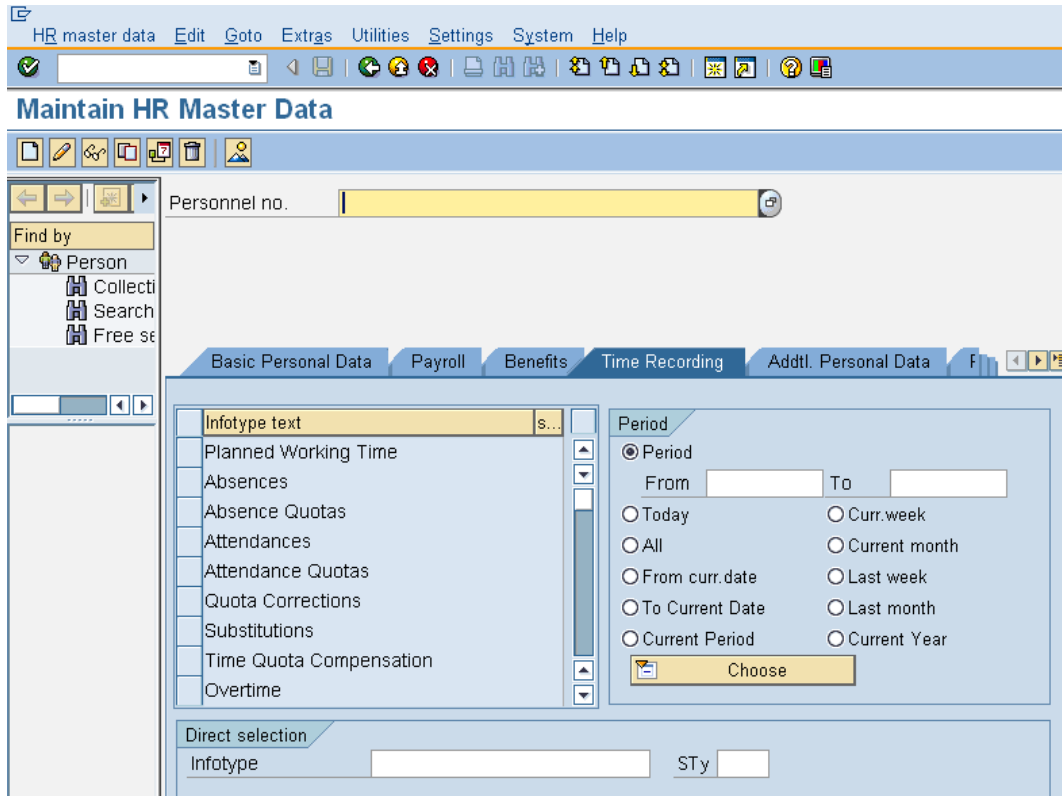| R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Abs. quota type	R	It is a specific quota that is being returned by the **Recipient.** **Example: Shared Leave**
Number/Unit	R	Enter the number of hours being returned to the **Donor** from another agency. **Example: 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.**

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		Example: Vacation Leave

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.

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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 [Quota Corrections].

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"*

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 Acrual
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

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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** ![info] 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 icon] (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 followin 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. ℹ The **donors** personnel number **Example:** 40000100

Program   Edit   Goto   System   Help
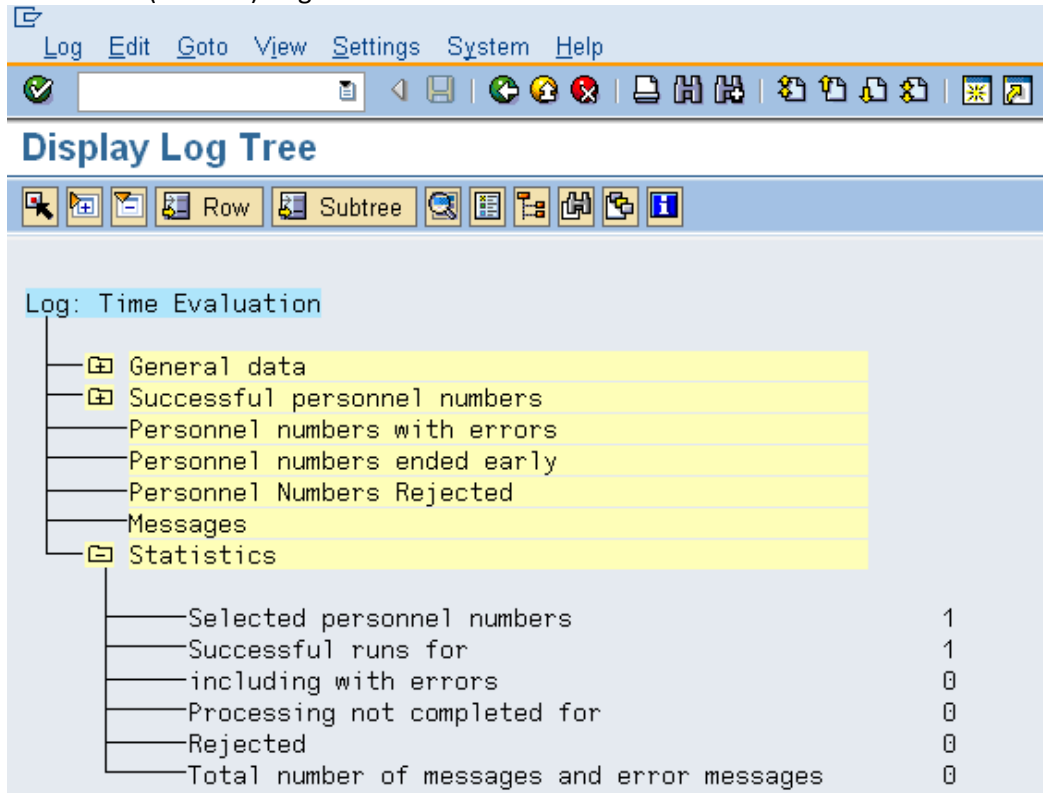
HR TIME: Time Evaluation

| 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

☑ Display log
☐ Test run (no update)
☐ Stop at function/operation BREAK
☐ Stop at fixed positions in time evaluation

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

Display Log Tree

```
Log  Edit  Goto  View  Settings  System  Help

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 **Time Recording** tab.

24. Select the box to the left of **Absence Quotas** to select.

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

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

27. Click (Overview) to view quotas.

⚠️ 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.