

Quota_Create YTD Sick leave earned and taken for YTD buyout

Transaction Code:
PA30

Purpose Use this procedure when an employee transfers into your agency from an agency that does not maintain leave balances within HRMS.

You will need to create records to capture the Year to date (YTD) sick leave earned and taken for the employee which is used for the YTD sick leave buyout calculation.

Trigger Perform this procedure to create the YTD Sick leave earned and taken.



Prerequisites Employee transfers from an agency that does not maintain leave balances in HRMS into your agency and needs sick leave earned and taken balances created.

End User Roles Payroll Processor, Leave Corrections Processor










Change History	Change Description
11/13/2007	Created
4/22/2010	Screen shots updated to match current system. Helpful hint added
3/4/2013	Added note to step 17 and added steps 18-24

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

Transaction Code PA30

Helpful Hints	
	 This procedure does not establish the accrual balance for the employee, it captures the sick leave hours taken and earned hours for the employee that is used in the sick leave buyout calculation.
	 Refer to the OLQR user procedure " Appointment Change Action – Transfer " for additional information regarding transfers.

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. Example: 40000084

3. Click  (Enter) to validate the information. Verify you have accessed the correct employee record.
4. Click the **Time Recording** tab to select.
5. Click **Absence Quotas** to select.

6. Enter the **last** day the employee worked at the losing agency into the Period Selection.

The screenshot shows the 'Maintain HR Master Data' application window. The 'Personnel no.' is 40000084 and the name is SANCHEZ FORREST. The 'Absence Quotas' section is active, and the 'Period' is set to 'From 03/31/2010 To 03/31/2010'. The 'Direct selection' section shows 'Absence Quotas' selected.

Field	Value
Personnel no.	40000084
Name	SANCHEZ FORREST
PersArea	3028 DSHS Region 6
EEGroup	0 Permanent
PSubarea	00JE Econ/Social Svcs
EESubgroup	06 M-OT Elig>40hrs/wk
Status	Active

Absence Quotas Section:


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

Period Selection:

Period
From 03/31/2010 To 03/31/2010

Today Curr. week
 All Current month
 From curr. date Last week
 To Current Date Last month
 Current Period Current Year


Direct selection:
Infotype: Absence Quotas STy: []

7. Click  (Create) to create a new record.

8. Complete the following fields:

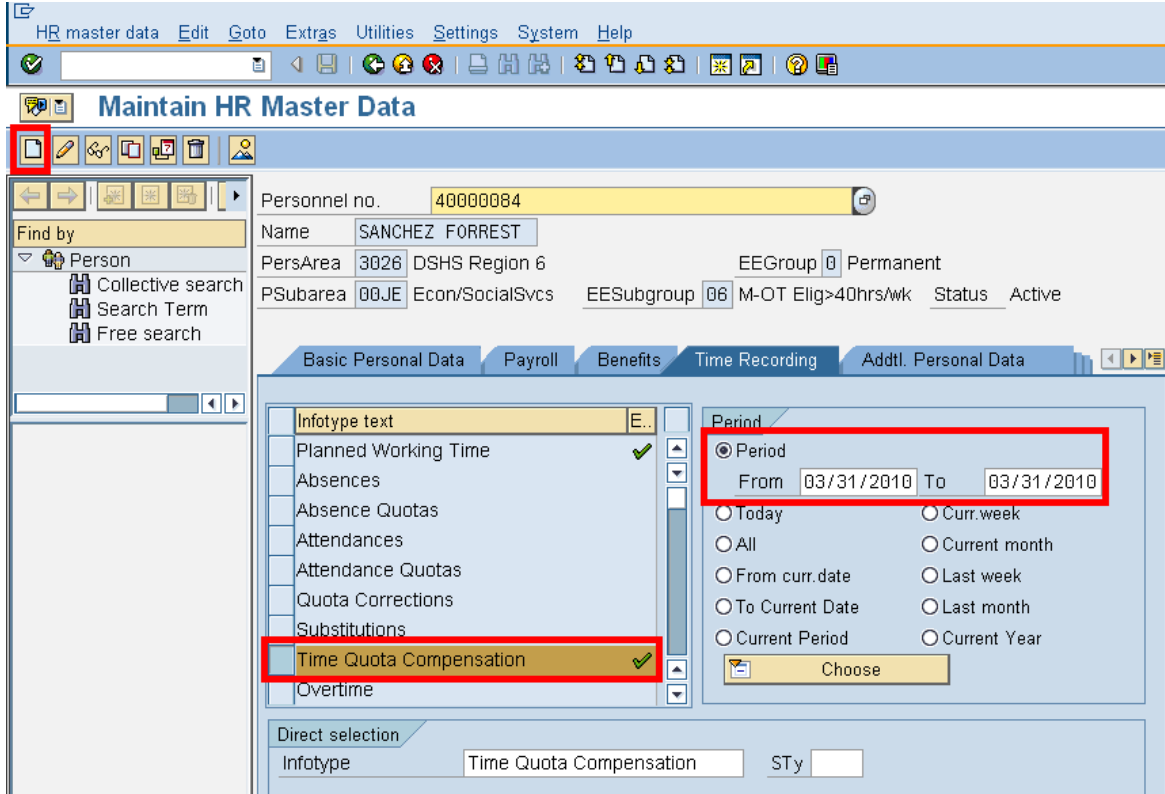
R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Type	R	The absence quota type Example 90- Sick Leave Conversion
Number	R	This is the Year to date total number of sick leave hours earned from the start of the year until the employee's last day with the losing agency. Example: 32
Valid From	R	The employees' last day at the losing agency Example: 3/31/2010
End Date	R	The employees' last day at the losing agency

		Example: 3/31/2010
Deduction from	R	The employees' last day at the losing agency Example: 3/31/2010
Deduction to	R	This is the date on which the deduction record should end, or cease being effective Example: 12/31/9999

9. Click  (Enter) to validate the information.

10. Click  (Save) to save.

11. Click **Time Quota Compensation** to select.



HR master data Edit Goto Extras Utilities Settings System Help

Maintain HR Master Data


Personnel no. 40000084
Name SANCHEZ FORREST
PersArea 3026 DSHS Region 6 EEGroup 0 Permanent
PSubarea 00JE Econ/SocialSvcs EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Basic Personal Data Payroll Benefits Time Recording Addtl. Personal Data

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

Period
 Period
From 03/31/2010 To 03/31/2010
 Today Curr.week
 All Current month
 From curr.date Last week
 To Current Date Last month
 Current Period Current Year
Choose



Direct selection
Infotype Time Quota Compensation STy

12. Click  (Create) to create a new a record

Subtypes for infotype "Time Quota Compensation" (1) 14 Entries found

ESG	PSG	Comp.meth.	Description
2	10	1000	Free compensation
2	10	9001	Sick Leave Buyout - Tax
2	10	9002	Sick Leave Buyout -No Tax
2	10	9003	Annl Leave Buyout-Ret
2	10	9004	Annl Leave Buyout -No Ret
2	10	9005	Sick Leave Buyout-Annual
2	10	9006	Comp Time Buyout
2	10	9007	Sick Leave Buyout - VEBA
2	10	9008	Comp Time Buyout-No Ret
2	10	9009	Holiday Credit Buyout WSP
2	10	9010	Settl Lv Buyout WSP-NoRet
2	10	9011	Settl Lv Buyout WSP-Ret
2	10	9012	Hol. Cr. Buyout WSP-NoRet
2	10	9999	YTD Sick Lv Taken - Conv

13. Double- Click | 2 10 9999 YTD Sick Lv Taken - Conv .

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Start	R	<p>This is the date on which a record begins.</p>  <p>This field defaults to date of entry. This date needs to be the same date that was used when creating the employee's Absence Quotas (2006). The last day the employee worked for the losing agency.</p> <p>Example: 3/31/2010</p>
No. to compensate	R	<p>This allows the user to enter the number of hours or days a quota type to be paid out to an employee.</p>  <p>Enter the employees YTD sick leave taken up to the transfer in this field.</p> <p>Example: 12</p>

Infotype Edit Goto Extras System Help

Create Time Quota Compensation (0416)

Personnel No. 40000084 Name SANCHEZ FORREST
PersArea 3026 DSHS Region 6 EESubgroup 06 M-OT Elig>40hrs/wk Permanent
PSubarea 00JE Econ/Social Svcs Status Active
Start 03/31/2010
Comp. method 9999 YTD Sick Lv Taken - Conv

Compensation specifications

Time quota type 90 Sick Leave Conversion
Compensation rule 000
No. to compensate 12.00000
 Do not account

Absence quotas

ATy	Quota text	Entitl.	Unit	Comp.	Rem.	WT	Amount	Curr...	Deduction fr...	Deduction to
90	Sick Leave Conversion	32.00000	Hours	0.00000	32.00000		0.00	<input type="checkbox"/>	03/31/2010	12/31/9999

16. Click (Enter) to validate entries.

17. Click (Save) to save.

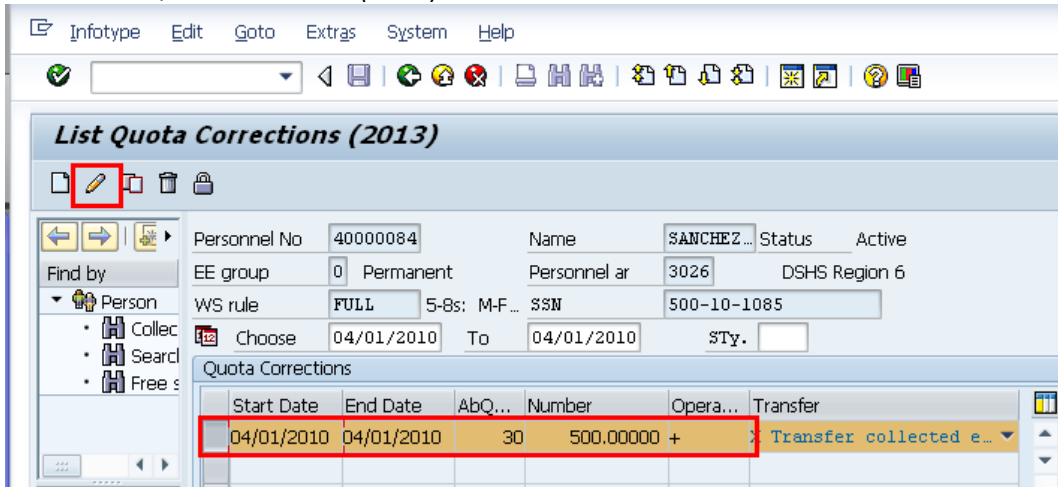



Agencies will need to create a **Quota Correction (2013)** Leave Type **30- Sick Leave** to establish the employee's sick leave balance from the losing agency.



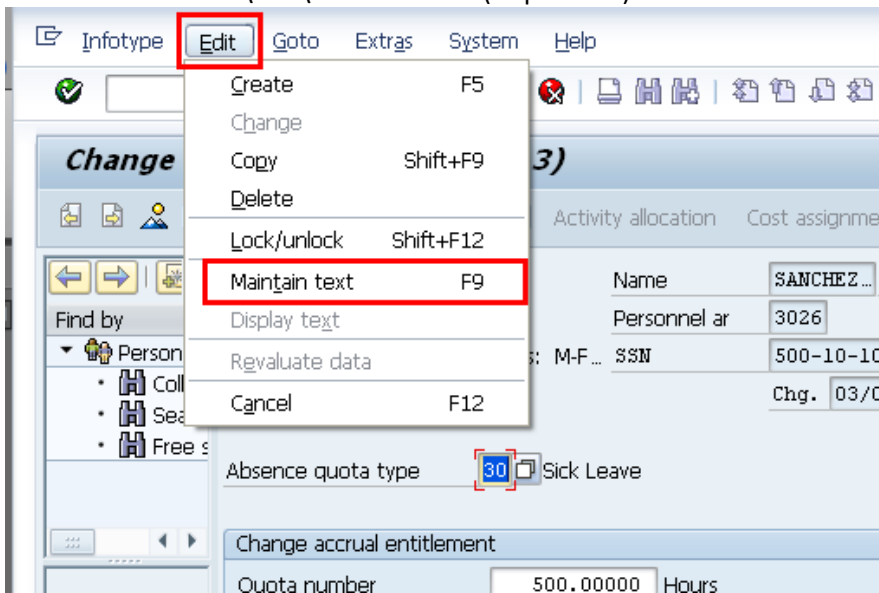
Once you have created the **Quota Correction (2013)** you will need to create a **Text Note** on the employees **Quota Correction (2013)** to indicate this as a prior year adjustment so it will be excluded from the employees' **Year-to-Date** sick leave earned from the sick leave buyout reports.

18. Access the **Quota Correction (2013)** that was created

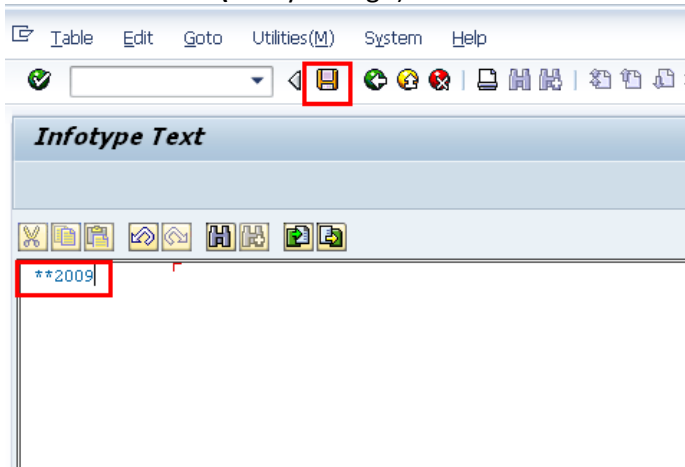


19. Click the  (Change) to add the Text Note.

20. Go to the Menu Bar\Edit\Maintain Text (or press F9)

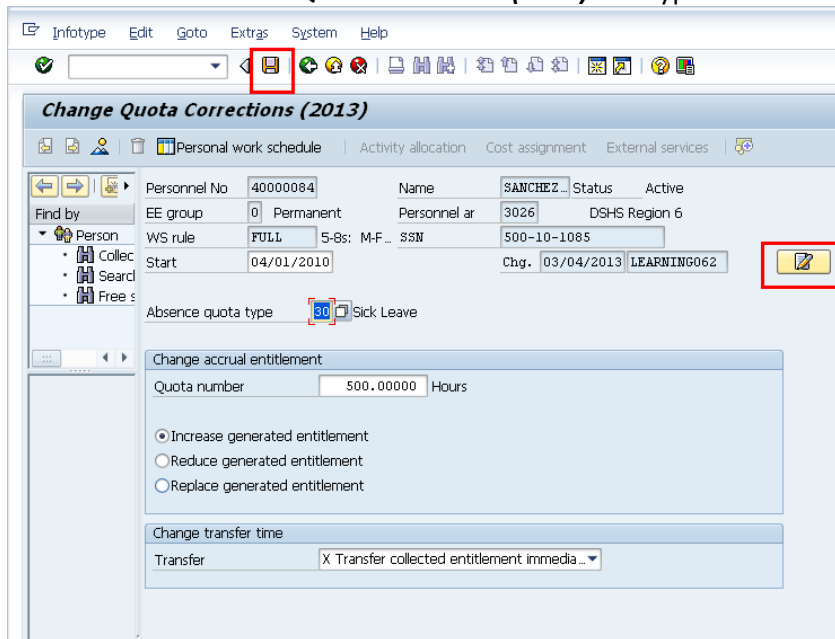


21. Enter the ****YYYY** (four year digit)



22. Press  (Save) to Save.

a. You will be taken to the **Quota Correction (2013)** infotype



23. Press  (Save) to Save.



The system displays the message, "Record Created."

24. You have completed this transaction.

Results
You have created the records to capture the Year to date (YTD) sick leave earned and taken for the employee which is used for the YTD sick leave buyout calculation.