

Shared Leave Returning Personal Holiday to Donor

Transaction Code:
PA30

Purpose Use this procedure to return the unused hours of a Personal Holiday that was that was donated to the Recipient.

Trigger Perform this procedure when the Recipient of shared leave has excess leave to return to the donor as a Personal Holiday Shift for the donor to use.

Prerequisites

- Verify the type of donated quota Personal Holiday that should be returned to the donor.
- Verify the base rate with wage type 1010 on the *Recurring Payments/Deductions Infotype* (0014), and the *Absence Pools Infotype 0696* is still active for both the donor and the recipient.

End User Roles Payroll Processor, Leave Corrections Processor










Change History	Change Description
9/22/2011	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

A Donor donated their Personal Holiday to an employee in need of Shared Leave (Recipient).

The Recipient is no longer in need of shared Leave and has excess leave to return.

You need to return the remaining hours of the Donor's Personal Holiday to them.

If	Then
The donation and the return occur is different years	Stop after step 28


Procedure





1. Start the transaction using the above menu path or transaction code **PA30**.

The screenshot shows the SAP HR Master Data display for Personnel no. 40000200. The 'Time Recording' tab is selected. The 'Infotype text' list includes: Actions (checked), Organizational Assignment (checked), Personal Data (checked), Addresses (checked), Planned Working Time (checked), Basic Pay (checked), Contract Elements (checked), Date Specifications (checked), and Family/Related Person (checked). The 'Period' section shows: From 01/01/1800 To 12/31/9999, with radio buttons for 'All' (selected), 'Today', 'From curr. date', 'To Current Date', 'Current Period', 'Curr. week', 'Current month', 'Last week', 'Last month', and 'Current Year'. A 'Choose' button is visible below the radio buttons.

2. Complete the following fields:



R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/	Description

	C	
Personnel no	R	The employee's unique identifying number.  Enter the recipients personnel number Example: 40000200

3. Click  (Enter) to validate the information. Verify you have accessed the correct employee record.
4. Click the  tab to select.
5. Enter the date of the return.
 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  to select

7.

The screenshot shows the 'Maintain HR Master Data' window for personnel number 40000200, named KORZE JOZICA. The 'Absence Pools' section is active, and 'Absence Donation Administration US' is selected. The 'Period' section shows options for selecting a date range, with 'From' set to 09/01/2011. A 'Choose' button is visible in the 'Period' section.

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

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: 500-10-1154 Status: Active
 Start: 09/01/2011

Recipient Information

Absence Donation Administration US

Abs. quota type [dropdown]
 Number/Unit [input]

Home Pool
 Home Pool ID: 0040 S [dropdown] Common Pool [dropdown]

Foreign Pool
 Foreign Pool ID: [input] [dropdown]


Employee Amount Related



Donor's Information


Personnel no.: [input]
 Target Abs. quota: [input]

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

10. 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: 3
Personnel no.	R	The employee's unique identifying number.  Enter the Donors personnel number Example: 40000132
Amount Related	R	Check this box.


		 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: Shared Lv. Donation

11. Click  (Enter) to validate the information.

12. Click  (Save) to save.





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

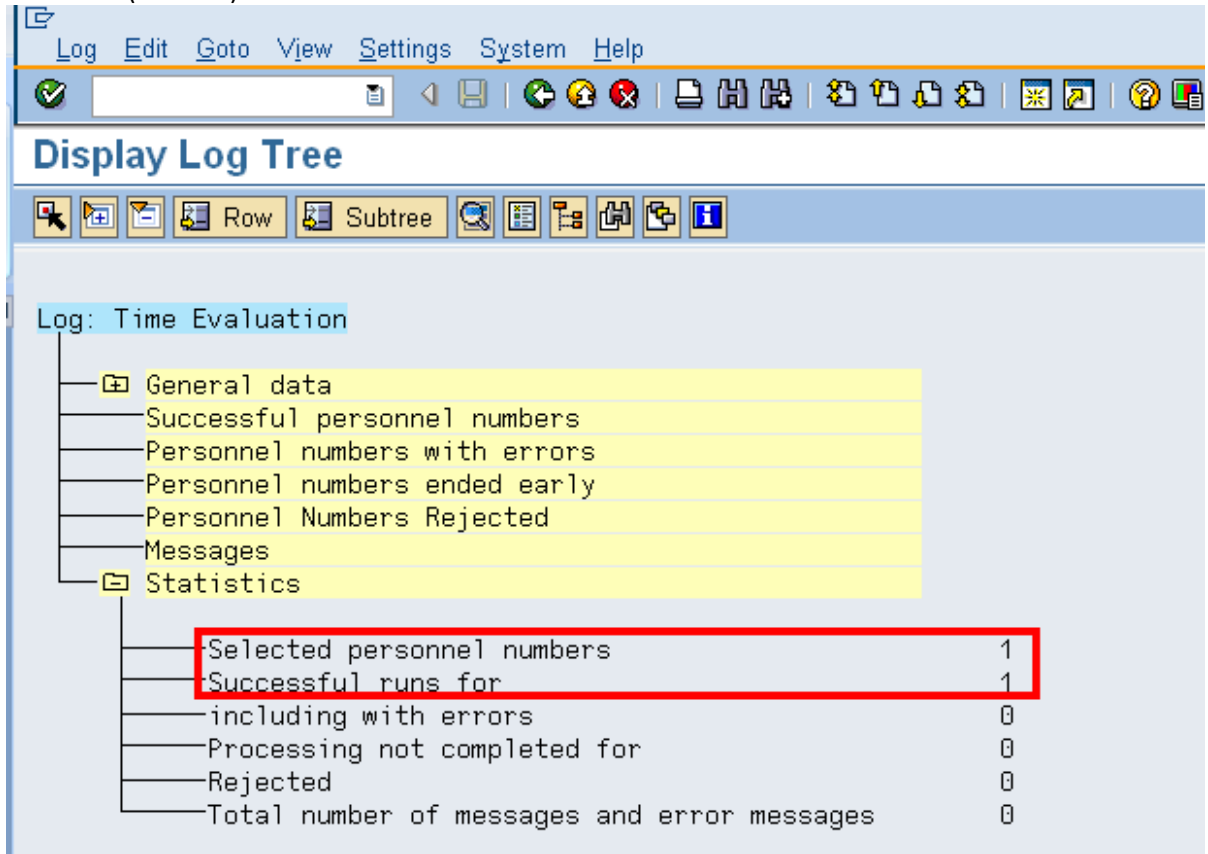
Enter **/NZT60** into command field and Click  (Enter).

The screenshot shows the SAP HR TIME: Time Evaluation interface. At the top, there is a menu bar with 'Program', 'Edit', 'Goto', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area is titled 'HR TIME: Time Evaluation' and contains a 'Selection' table with the following fields: 'Personnel Number', 'Personnel area', 'Personnel subarea', and 'Payroll area'. The 'Personnel Number' field is highlighted with a red box, and a callout bubble points to it with the text 'Donors Personnel Number'. Below the selection table, there are 'Parameters for time evaluation' including 'Forced recalculation as of' and 'Evaluation up to' (set to 09/30/2011). At the bottom, there are 'Program options' with checkboxes for 'Display log', 'Test run (no update)', 'Stop at function/operation BREAK', and 'Stop at fixed positions in time evaluation'.

13. 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: 40000132

14. Click  (Execute) to run the **Time Evaluation**.



The screenshot shows a software interface titled "Display Log Tree". The main content area displays a tree structure for a "Log: Time Evaluation". The tree has two main branches: "General data" and "Statistics". The "Statistics" branch is expanded, showing a list of metrics and their corresponding values. The following table represents the data shown in the screenshot:

Metric	Value
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



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

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

HR master data Edit Goto Extras Utilities Settings System Help

Display HR Master Data

Personnel no. 40000132

Name COINS CLAIRE

PersArea 5400 Employment Security Dept EEGroup 0 Permanent

PSubarea 00FT Agencywide EESubgroup 05 H-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 05/06/2009 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 Annual Leave/Vacation

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 45** **PH - Shared Lv. Donation** (Select the quota type that was originally donated by the donor) to narrow the search results.
19. Click  (overview) to display all records.

Start Date	End Date	A...	Quota text	Start ded	End ded.	Number	Deduction
09/30/2011	09/30/2011	45PH -	Shared Lv. Donation	09/30/2011	12/31/9999	3.13000	0.00000

20. Click  (back) button to return to the Maintain HR Master Data Screen.


21. Click the box to the left of .


22. Enter the date of the return in the **From** field.


23. Click  (Create) to create.


24. Select **1000 Free compensation** from the *Subtypes for infotyp "Time Quota Compensation"* screen.
25. Select quota type **45** in the Time Quota Type field.
26. Enter the hours returned in the No. to compensate field, and check the **do not account box**.

ATy	Quota text	Entitl.	Unit	Comp.	Rem.
30	Sick Leave	6.67272	Hours	0.00000	2.82520

27. Click  (Enter) to validate entries.

28. Click  (Save) to save.

 If the original donation of the Personal Holiday and the return of the unused hours are in **different** years you have **completed** the process of returning unused Personal Holiday hours.

 Please use the Maintain Text Function to create a note indicating the reason of reducing the quota type **45** is because the Personal Holiday was donated **and** returned in different years so that the returned hours are removed.



If the donation **and** the return occur in the **same** year continue:



As Quota type **42-Personal Holiday Shift** is stored as **day units**, and not hours, you will need to manually divide the hours returned by scheduled work hours on the day of the return. For example:

Our donor received **3.13 hours** back from their original donation of their personal holiday. On the day of the return our employee is scheduled to work **10 hours**. To determine the actual hours to return to our employee $3.13/10 = .313$

Create a *Quota Correction (2013)* to give 0.313 of quota type **42- Personal Holiday Shift** back to the donor.



A **Quota Correction** is needed to give the donor the remaining hours left of their personal holiday.

29. On the *Maintain HR Master Data* screen, click the box to the left of

Quota Corrections

30. Click  (Create)

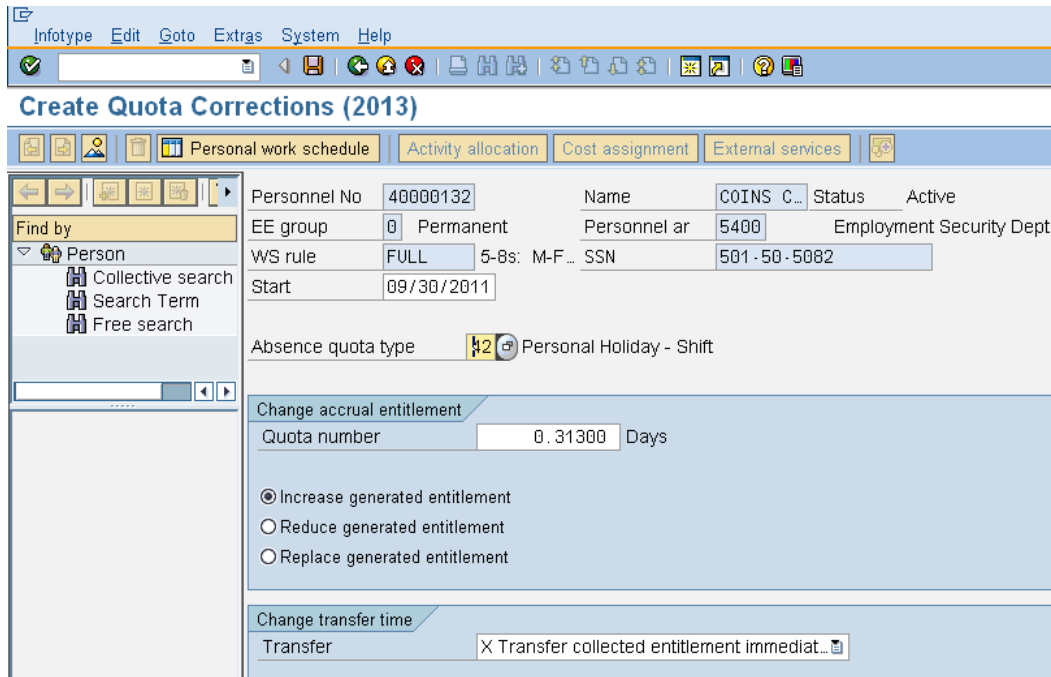
31. From the *Subtypes for infotype "Quota Corrections"* select quota type **42- Personal Holiday-Shift**


ESG	PSG...	AQTyp	Quota text
1	50	30	Sick Leave
1	50	31	Vacation Leave
1	50	34	Jus. Excess Leave
1	50	35	Compensatory Time
1	50	37	Exchange Time
1	50	38	Military Leave
1	50	39	Holiday Credits
1	50	40	Excess Vacation Accrual
1	50	41	Shared Leave
1	50	42	Personal Holiday - Shift
1	50	43	Settl Leave WSP
1	50	44	Recognition Lv (PMC)
1	50	45	PH - Shared Lv. Donation
1	50	46	Sick Leave Pool
1	50	47	Uniformed Serv Lv Pool
1	50	48	Personal Leave Day
1	50	49	Temp Salary Reduction Lv.

32. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Quota Number	R	The hours of the quota accrual Example: .313
Increase generated entitlement	R	Select this radio button
Transfer	R	Specify how you want the quota correction to be processed. Select: <ul style="list-style-type: none"> Do not change transfer time The quota correction is not processed until the time at which time evaluation normally transfers the calculated entitlement to the <i>Absence Quotas</i> infotype (2006). In this case, the quota correction does not appear immediately in infotype 2006, so you cannot deduct an absence or quota compensation from the value of the

		<p>quota correction.</p> <ul style="list-style-type: none"> Transfer collected entitlement immediately The quota correction is processed in the next time evaluation run. If you run time evaluation directly for the employee, the value of the quota correction and any entitlement already accrued by time evaluation are available for deduction in the <i>Absence Quotas</i> infotype (2006) directly afterwards. Only transfer quota correction immediately The quota correction is processed in the next time evaluation run. If you run time evaluation directly for the employee, the value of the quota correction is available for deduction in the <i>Absence Quotas</i> infotype (2006) directly afterwards. <p>Example: Transfer collected entitlement immediately</p>
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33. Click  (Enter) to validate the information.

34. Click  (Save) to save.



35. To establish the quota balance for the employee, run the **Time Evaluation (ZT60)**. Enter **/NZT60** in the command field.

36. 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. Example: 40000132

Program Edit Goto System Help

HR TIME: Time Evaluation

Further selections Search helps Sort order

Selection

Personnel Number 40000132

Personnel area

Personnel subarea

Payroll area

Parameters for time evaluation

Forced recalculation as of

Evaluation up to 09/30/2011


Program options

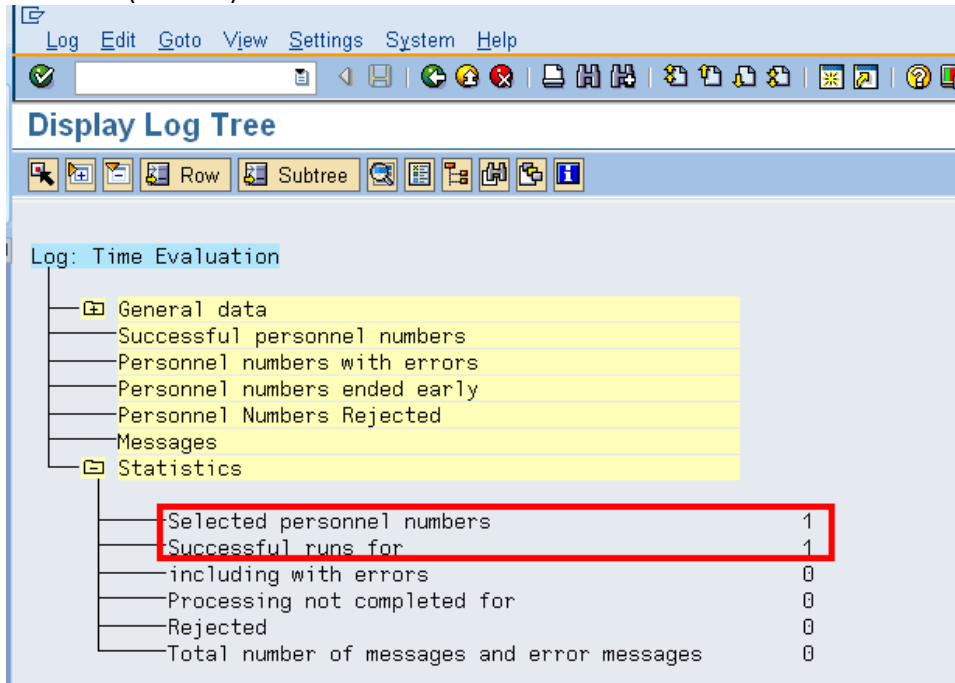
Display log

Test run (no update)

Stop at function/operation BREAK

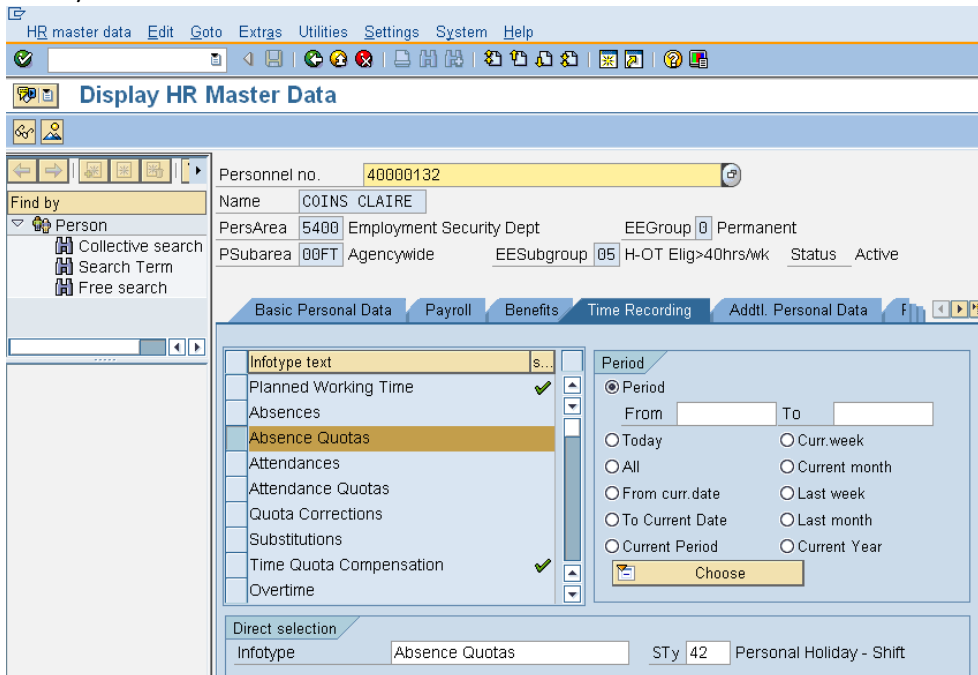
Stop at fixed positions in time evaluation

37. Click  (Execute) to run the **Time Evaluation**.




To verify the quota balance, access the employees' **Absence Quotas (2006)** infotype

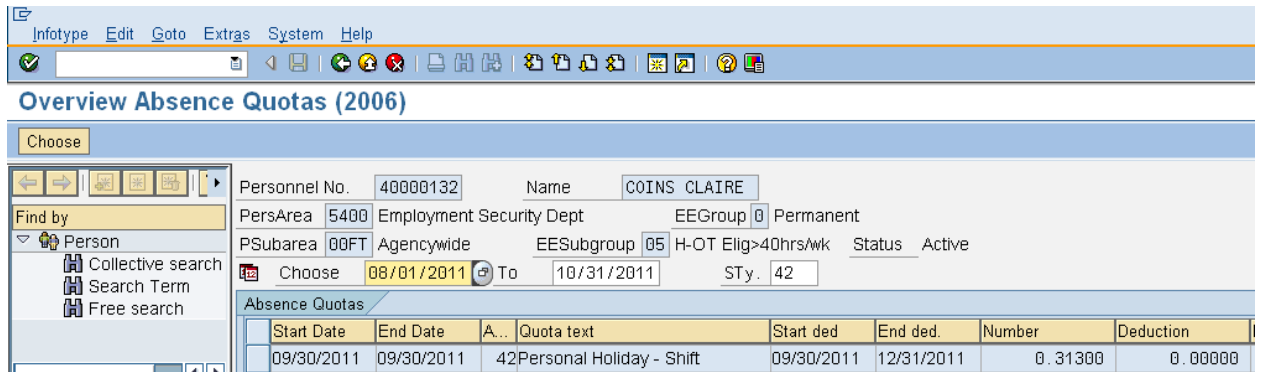
38. Enter **/NPA20** into the command field:



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

40. Select the blue box to the left of **Absence Quotas** to select.

41. Select the All to view all records created.
42. STy 42 Personal Holiday - Shift
43. Click  (overview) to display all records.



Overview Absence Quotas (2006)

Choose

Personnel No. 40000132 Name COINS CLAIRE

PersArea 5400 Employment Security Dept EEGroup 0 Permanent

PSubarea 00FT Agencywide EESubgroup 05 H-OT Elig>40hrs/wk Status Active

Choose 08/01/2011 To 10/31/2011 STy. 42

Start Date	End Date	A...	Quota text	Start ded.	End ded.	Number	Deduction
09/30/2011	09/30/2011		42Personal Holiday - Shift	09/30/2011	12/31/2011	0.31300	0.00000



You have **completed** the process of returning unused Personal Holiday hours back to the original donor, when both return and donation are made within the **same** year.

Results

You have successfully returned the unused hours back to the donor, and removed the unused hours from the donors quota balance as the donation and return occur in different years.