

# *HRMS End User Training*



## *HRMS Quotas Training Guide*

# HRMS Quotas



# Classroom Introductions

## Participant Introductions

- Security
- Restrooms
- Participant Lounge
- Building Evacuations
- Messages
- Cell Phones
- Computers
- Name
- Agency
- Goal(s) for class



# Training Materials

## The following training materials and tools are used:

- **HRMS Training Guide:** Designed to introduce you to HRMS navigation terms and concepts and to provide the necessary information to complete the activities.
- **HRMS Activity Guide:** Designed to provide you with demonstrations and exercises that help solidify your understanding of concepts learned in the course and also provide you with an opportunity to use HRMS.

# Training Tools

- **HRMS On-line Quick Reference (OLQR):** On-line help that provided you with step-by-step instructions designed to help you complete tasks in HRMS.

The screenshot shows the HRMS On-Line Quick Reference page. At the top, there is a navigation bar with links for Contact DOP, About Us, Topic Index A-Z, Forms, Publications, and Calendar. Below this is the HR logo and the text 'Washington State Department of Personnel'. A search bar with a 'GO' button is located to the right. A horizontal menu contains buttons for Home, Strategic HR, Compensation & Job Classes, Training, Recruitment, Rules, Diversity, Payroll, and More DOP Services. The 'Payroll - HRMS' button is highlighted in green. Below the menu, a sidebar lists: HRMS Support, Payroll Calendars & Schedules, HRMS-Related Training, On-Line Quick Reference (with a right-pointing arrow), and Personnel/Payroll Association. The main content area has a breadcrumb trail: Home > Payroll > Human Resource Management System > On-Line Quick Reference, followed by a 'Print Friendly' link. The title is 'On-Line Quick Reference'. The text states: 'The On-Line Quick Reference (OLQR) contains instructional materials to help you perform day-to-day tasks in the Human Resource Management System (HRMS). It is organized by functional areas and roles, job aids, HRMS reports, user procedures, course manuals, and glossary.' A bulleted list of links includes: Functional Areas and Roles, Job Aids, HRMS Reports, User Procedures, Course Manuals, Glossary, and HRMS Communications. Below the list is a link for 'HRMS Data Definitions Project'. On the right, a yellow box contains 'Portal Access' with links for HRMS/BI Portal (SSO) and HRMS/BI Portal (All), 'Related Links' with a link for Acronyms, 'Related Documents' with a link for HRMS Upgrade Impacts, and 'Contact Us' with the phone number 360-664-6400 or a link for E-Mail. At the bottom, there is a search bar labeled 'Search OLQR' with a dropdown arrow and a search icon.

Website address: <http://hr.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/default.aspx>

# Job Aids

- HRMS Job Aids:**  
 Designed to provide you with reference materials so you can quickly access relevant HRMS information.

Contact DOP | About Us | [Topic Index A-Z](#) | [Forms](#) | [Publications](#) | [Calendar](#)

**HR** Washington State Department of Personnel

Home | Strategic HR | Compensation & Job Classes | Training | Recruitment | Rules | Diversity | Payroll | More DOP Services

Home > Payroll > Human Resource Management System > On-Line Quick Reference > Job Aids

**Payroll - HRMS**

- HRMS Support
- Payroll Calendars & Schedules
- Training
- On-Line Quick Reference ▶

**Job Aids**

HRMS End User Job Aids

The following job aids provide quick-reference guide to end users allowing them to accomplish a particular task or activity.

**Contact Us**  
360-664-6400 or [E-mail](#)

Job Aids	Format	Date
Access HRMS	<a href="#">PPT</a>   <a href="#">PDF</a>	4/04/07
Basic Navigation	<a href="#">PPT</a>   <a href="#">PDF</a>	4/04/07
Employee Hiring and Processing	<a href="#">PPT</a>   <a href="#">PDF</a>	1/22/08
Financial Reporting	<a href="#">PPT</a>   <a href="#">PDF</a>	5/14/07
Garnishments	<a href="#">PPT</a>   <a href="#">PDF</a>	1/16/08
General Reporting	<a href="#">PPT</a>   <a href="#">PDF</a>	4/04/07
HRMS Benefits	<a href="#">PPT</a>   <a href="#">PDF</a>	1/23/08
HRMS Payroll and Reports	<a href="#">PPT</a>   <a href="#">PDF</a>	9/29/08
Inquirer Roles	<a href="#">PPT</a>   <a href="#">PDF</a>	4/04/07
Maintain Payroll Master Data	<a href="#">PPT</a>   <a href="#">PDF</a>	8/06/08
Organizational Management	<a href="#">PPT</a>   <a href="#">PDF</a>	3/03/08
Personnel Time Recording	<a href="#">PPT</a>   <a href="#">PDF</a>	4/04/07
Quotas	<a href="#">PPT</a>   <a href="#">PDF</a>	8/06/08
Supervisor Roles	<a href="#">PPT</a>   <a href="#">PDF</a>	4/04/07
Time Absence Types	<a href="#">PPT</a>   <a href="#">PDF</a>	1/16/08
Time Management	<a href="#">PPT</a>   <a href="#">PDF</a>	2/13/07
Time Wage Types	<a href="#">PPT</a>   <a href="#">PDF</a>	1/24/08
Year End Reports	<a href="#">PPT</a>   <a href="#">PDF</a>	4/02/08

Website address: <http://hr.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/default.aspx>

# Course Objectives

- Upon completion of this course, you should be able to:
  - Explain new terms and key components of quota accruals and maintenance.
  - Create and maintain shared leave quota for cross- and same-agencies donors and recipients.
  - Explain the process of quota corrections and when they should be made.
  - Determine when to create a manual adjustment.
  - Prepare a leave buyout for an employee separating from state service.
  - Run HRMS reports.
  - Access and navigate the Online Quick Reference (OLQR)

# HRMS Role Based Security

- HRMS has role-based security
- System security dictates the information that you can update
- Your agency assigned your role based on what tasks you perform
- There are agency-level and centralized roles



# Roles Review

- **Leave Correction Processor:**  
Responsible for maintaining employee leave and shared leave information for new and existing employees.
- **Payroll Processor:**  
Responsible for creating and maintaining payroll information for new and existing employees in the HRMS system. New employee payroll information is entered once the human resource information has been entered.
- **Payroll Analyst:**  
Responsible for identifying time and payroll master data errors.
- **Time and Attendance Processor:**  
Responsible for recording time and attendance into CATS.
- **Time and Attendance Inquirer:**  
Views absence quotas (accrual) and payroll time entries.
- **Time and Attendance Supervisor:**  
Provides oversight to the Time and Attendance Processor and Inquirer. Ability to view all infotypes, has limited update ability.

# Section 1: Quota Overview

# Section Overview

- Upon completion of this section, you will be able to:
  - Define new terms related to quotas
  - Describe types of quota
  - List the infotypes that impact quota accruals
  - Explain who earns quotas, when quotas are accrued
  - Describe the *Time Evaluation*
  - Define how quotas are used and displayed on the earning statements

# Key Terms

- **Cross-Application Time Sheet (CATS)** – Central time sheet used to enter employees time data
- **Quota Types** - Different categories for quota balance
- **Quota Accrual**- Rate an employee accumulates absence time in different quota types. The rate is determined by the employees years of State service, or collective bargaining agreements.
- **Quota Balances**- The amount of absence time an employee has available
- **Time Evaluation** – A process that updates quotas

# Types of Quota

## ■ System Generated Quotas

- 30 Sick Leave
- 31 Annual Leave
- 34 Justified Excess Vacation (JEV)
- 40 Excess Vacation Accrual (EVA)\*
- 42 Personal Holiday-Shift

## ■ Quotas Generated from Time Entries

- 35 Compensatory Time
- 37 Exchange Time
- 39 Holiday Credits

## ■ Other Quotas

- 34 Justified Excess Vacation (JEV)
- 38 Military
- 41 Shared Leave
- 46 Sick Leave Pool
- 47 Uniformed Serv Lv Pool



# Infotypes Impacting Quota Accrual

# Infotypes Impacting Quota Accrual

## ■ Actions (0000)

- Employment Status
  - Employees must be in active status to accrue leave

Infotype Edit Goto Extras System Help

Display Actions (0000)

Pers.No. 40000235  
 Name PHILLIPS MICHAEL  
 PersArea 1110 Dept of Personnel EEGroup B Civil Service Exempt  
 PSubarea 0003 Exempt EESubgroup 01 Monthly(M) OT Exe... Status Active  
 Start 01/01/2006 to 12/31/9999 Chng 01/21/2006 TRANSP

Personnel action  
 Action Type UX Current Conversion Active  
 Reason for Action 00 Initial Conversion Active

Status  
 Employment 3 Active

Organizational assignment  
 Position 70005872 DEP DIR PERS  
 Personnel area 1110 Dept of Personnel  
 Employee group B Civil Service Exempt  
 Employee subgroup 01 Monthly(M) OT Exempt

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action
01/01/2006	UX	Current Conversion Active	00	Initial Conversion Active

# Infotypes Impacting Quota Accrual cont'd.

## ■ Org Assignment (0001)

- Personnel Area/subarea
  - defines agency and if employee is represented or not
  
- Employee Group/subgroup
  - defines the employee (hourly, or monthly)

Infotype Edit Goto Extras System Help

Display Organizational Assignment (0001)

Org Structure

Personnel No. 40000235 Name PHILLIPS MICHAEL

PersArea 1110 Dept of Personnel EEGroup B Civil Service Exempt

PSubarea 0003 Exempt EESubgroup 01 Monthly(M) OT Exe... Status Active

Start 10/01/2008 to 12/31/9999 Chng 01/15/2009 JANETP

Enterprise structure

CoCode WA01 STATE OF WASHINGTON

Pers.area 1110 Dept of Personnel Subarea 0003 Exempt

Cost Ctr 1110000000 DEFAULT AGENC... Bus. Area 1110 Department of Personnel

Fund

Personnel structure

EE group B Civil Service Exempt Payr.area 11 Semi-monthly

EE subgroup 01 Monthly(M) OT Exempt Contract 16 Exempt

Organizational plan

Percentage 100.00

Position 70005872 0131

Job key 50003259 B2850

Exempt N

Org. Unit 30000492 AA

Org.key 1000

Administrator

PersAdmin

Time 0AA DIRECTOR'S OFFICE

PayrAdmin

# Infotypes Impacting Quota Accrual cont'd.

- *Planned Working Time (0007)*
  - Additional Time ID
    - Defines how the employee accrues leave
  - Employment percentage
    - Determines if the employee full time or part time

Infotype Edit Goto Extras System Help

Display Planned Working Time (0007)

Work schedule

Personnel No. 40000235 Name PHILLIPS MICHAEL

PersArea 1110 Dept of Personnel EEGroup B Civil Service Exempt

PSubarea 0003 Exempt EESubgroup 01 Monthly(M) OT Exe... Status Active

Start 01/01/2006 To 12/31/9999 Chg. 01/21/2006 TRANSP

Work schedule rule

Work schedule rule FULL 5-8s: M-F 8 hpd

Time Mgmt status 9 9 - Time evaluation of planned times

Part-time employee Additional time ID 00

Working time

Employment percent	100.00
Daily working hours	8.00
Weekly working hours	40.00
Monthly working hrs	174.00
Annual working hours	2080.00
Weekly workdays	5.00

# Infotypes Impacting Quota Accrual cont'd.

Infotype Edit Goto Extras System Help

Display Date Specifications (0041)

Personnel No. 40000314 Name BRADY TONYA

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00HA WFSE Agencywide EESubgroup 01 Monthly(M) OT Exe... Status Active

Start 06/01/2006 to 12/31/9999 Chng 06/22/2006 TRANSJP

**Date Specifications**

Date type	Date	Date type	Date
01 Anniversary Date	03/01/1985	02 Appointment Date	11/20/1995
03 Original Hire Date	03/01/1985	04 Prior PID	05/01/1995
05 Seniority Date	03/01/1985	07 Unbroken Srvc. Date	03/01/1985
18 Prsnl HolidayElgbty	06/16/2006		

## ■ Date Specifications (0041)

01- Anniversary Date

03-Original Hire Date

07- Unbroken Srvc Date

**Note:**  
In order for an employee to accrue leave, they must have these date types entered.

# Infotypes Impacting Quota Accrual cont'd.

## ■ Payroll Status (0003)

- PDC error indicator is **not** checked
- PDC recalculation date

Infotype Edit Goto Extras System Help

Display Payroll Status (0003)

Personnel No 0000235 Name PHILLIPS MICHAEL

EE group B Civil Service Exem... Personnel ar 1110 Dept of Personnel

EE subgroup 01 Monthly(M) OT Ex... SSN 500-10-1186 Status Active

Chng 12/21/2010 KELLYW

Payroll/Retroactive Accounting

Earl.pers. RA date 12/16/2008 Accounted to 02/28/2010

Run payroll up to

Do not account after

Mast.data chng.bonus Bonus Info

Pers.no.locked  Payroll correction

Time evaluation

Earl.pers.rec.date 01/01/2006 Pers.calendar from 06/23/2006

PDC recalculation 11/01/2008

PDC error indicator

Other data

Initial input 01/21/2006 19:26:07



**Note:**  
PDC – Plant Data  
Collection

# Infotypes Impacting Quota Accrual cont'd.

## ■ Payroll Results (9402)

- Worked Hours
  - Defines the total hours worked for the pay period

Infotype Edit Goto Extras System Help

Display Payroll Results 2 (9402)

Personnel No 40000235 Name PHILLIPS MICHAEL

EE group B Civil Service Exem... Personnel ar 1110 Dept of Personnel

EE subgroup 01 Monthly(M) OT Ex... SSN 500-10-1186 Status Active

Start 02/16/2010 To 02/28/2010 Chngd 12/23/2010 KELLYW

Payroll Results 2

Sequence Number 251

Country Grouping 10

Payroll area 11

Currency USD

For-period payroll 201005

Payroll type

Payroll Identifier

Payment date 03/10/2010

WSF Wrkd Hrs Period	0.00
SOW (no WSF) Hrs Per	72.00
WSF Wrkd Hrs Unlimited	0.00
WSF Probation Hrs Period	0.00
WSF Probation Hrs Unlimtd	0.00

# Who Earns Quota?



- Active employees earn quota.
- The accrual rate can vary between employees based on bargaining unit, service time and type of employee etc.

# When is Quota Accrued?

## Salaried Employees

- Employees must be in **active** status and worked 80 hours during the 1<sup>st</sup>- 15<sup>th</sup> of the month to receive accruals on the 16<sup>th</sup>.
- Accruals are added to an employee's quota balance after the ***Time Evaluation*** run on Day 1 of payroll processing

## Part-time or Hourly employees

- Quota accruals for part time and hourly employees is proportionate to the number of hours in paid status in the month to that required for full time employment.

# How Quotas is accrued

- Executed as a batch process (automated) to calculate and apply quota accrual values for employees during each payroll cycle.
- After the Time Evaluation has run, the quotas can be viewed to ensure the proper accrual rates have been applied.
- Check your agencies Spool files to verify transfers with no errors.
- Refer to the user procedure Spool File-Accessing and Printing Reports on the OLQR



# How quota is used by the employee

- A [leave slip](#) is submitted to the Time and Attendance Processor
- Absences are entered on the **Cross Application Time Sheet (CATS)**
- Absences are entered and checked against the employee's personnel file to ensure sufficient quota time exists

Data Entry Area															
LT	A/A...	Wa...	Position	MU	12/01	12/02	12/03	12/04	12/05	12/06	12/07	12/08	12/09	12/10	12/11
				H	8	8	8	8	8	0	0	8	8	8	
				H	8	8	0	0	0	0	0	0	0	0	
		9003		H	8	8									

# How quota is displayed for the employee

- Wage Types and Absence Types are listed on the Earnings Statement to account for an employee's time

Leave / Quota Balances	Begin	Earned	Taken	Adjust	Balance
Sick Leave	264.80	8.00	20.00	0.00	252.80
Annual Leave/Vacation	149.10	10.67	16.00	0.00	143.77
Personal Holiday - Shift	1.00	0.00	0.00	0.00	1.00 Use before 12/31/2008

Sullivan, James

1110 Dept of Personnel

Page 2 / 2

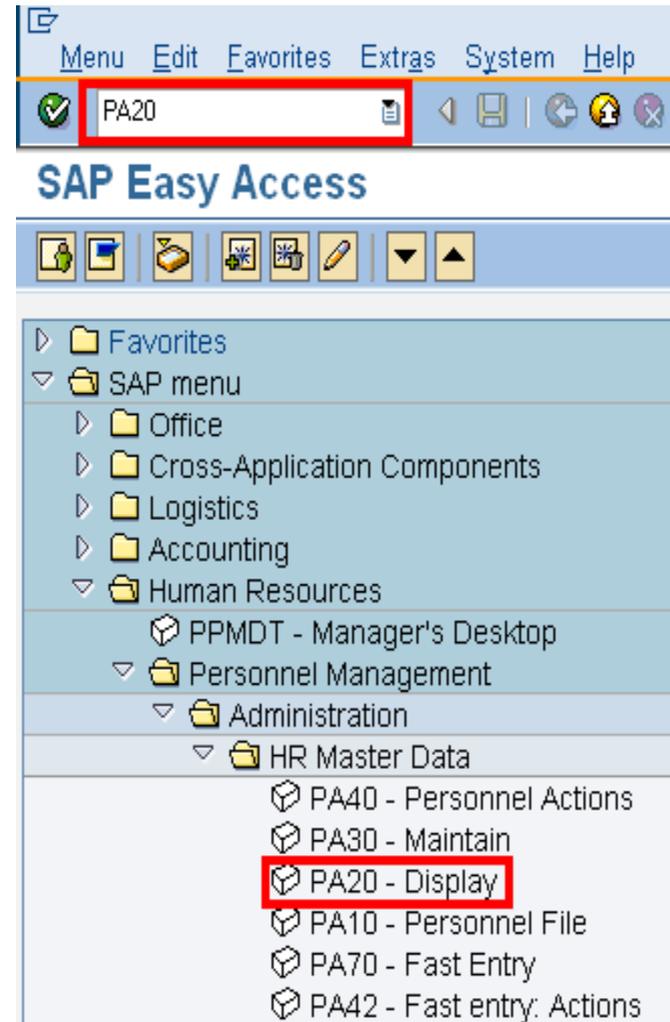
Position Title	Earnings Type	Hrs/Unit	Rate	Amount	YTD
	1003 Pay Period Salary	44.00	0.00	1,317.80	8,334.91
	1305 annual leave for all agys	16.00	29.95	479.20	2,345.47
	1310 Sick pay for all agys	20.00	29.95	599.00	599.00
	1315 Pers Holiday pay-all agys	0.00	0.00	0.00	207.36
	1321 Misc Paid Absence-all	0.00	0.00	0.00	33.26
	<b>Total Earnings</b>			<b>2,396.00</b>	<b>11,520.00</b>

**Side 1** Contains employee information and net pay

**Side 2** Contains a breakdown of earning types, allowances, mandatory deductions, voluntary deductions, and employer contributions

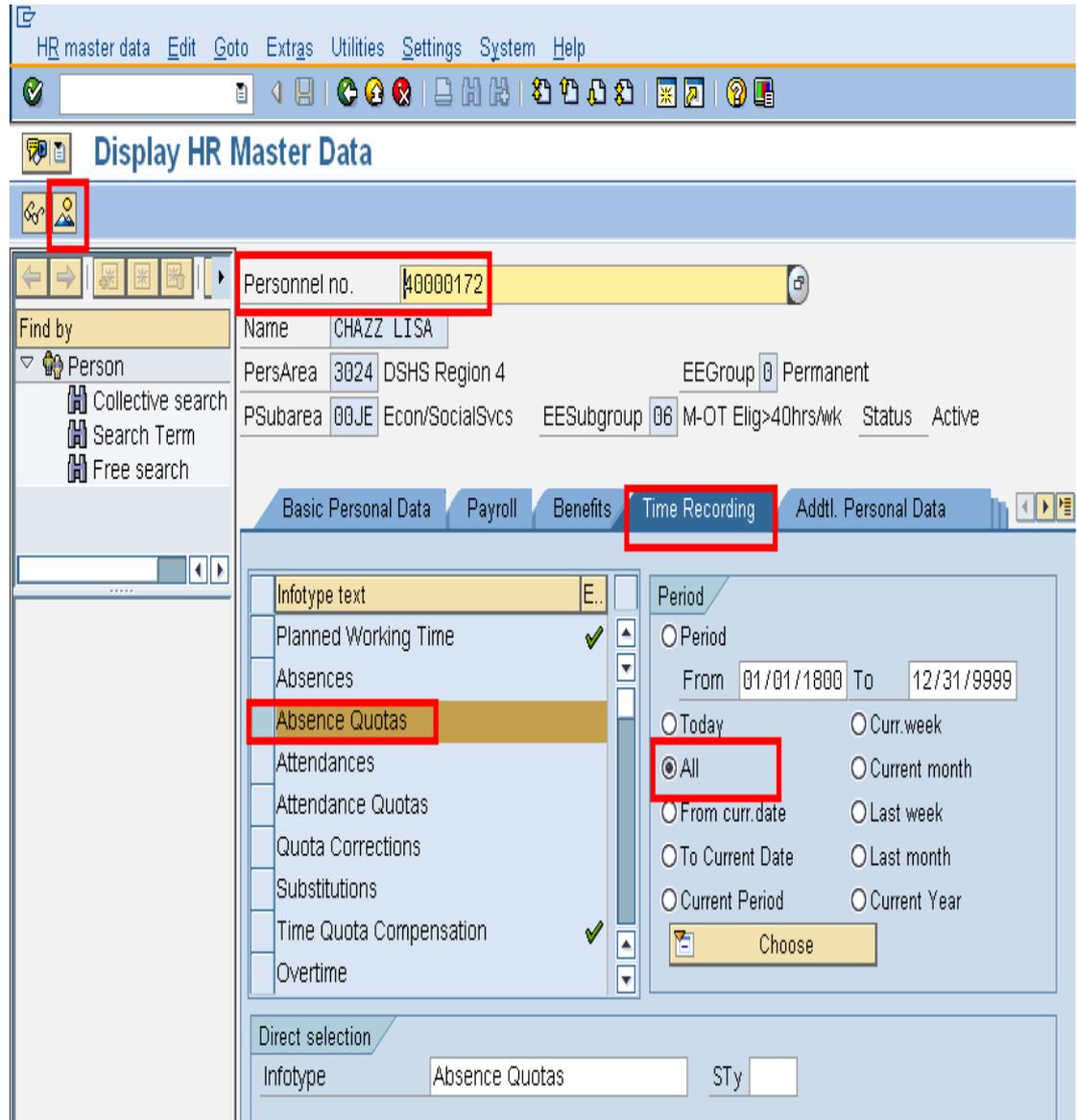
# Where to find Quota accruals

- To access the *Absence Quota* infotype, follow menu path:  
 Human Resources →  
 Personnel Management  
 → Administration → HR  
 Master Data →  
 Maintain
- You can also access the Base Rate infotype by using the transaction code **PA20** (Display HR Master data)



# Where to find Quota accruals cont'd.

- Enter the **employee's** personnel number
- Select the **Time Recording** tab
- Select **All** in the Period selection
- Select **Absence Quotas**
- Click  (Overview) to display all



The screenshot displays the HR Master Data application interface. The title bar reads "Display HR Master Data". The main window shows the "Time Recording" tab selected, which is highlighted with a red box. The "Personnel no." field is set to "40000172" and is also highlighted with a red box. The "Absence Quotas" option in the left-hand menu is highlighted with a red box. In the "Period" selection area, the "All" radio button is selected and highlighted with a red box. The "Direct selection" section at the bottom shows "Absence Quotas" selected in the "Infotype" field.

HR master data Edit Goto Extras Utilities Settings System Help

Display HR Master Data

Personnel no. 40000172

Name CHAZZ LISA

PersArea 3024 DSHS Region 4 EEGroup 0 Permanent

PSubarea 00JE Econ/SocialSvcs EESubgroup 06 M-OT Ellg>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 01/01/1800 To 12/31/9999

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

# Where to find Quota accruals cont'd.

Infotype Edit Goto Extras System Help

Overview Absence Quotas (2006)

Choose

Personnel No. 40000172 Name CHAZZ LISA

PersArea 3024 DSHS Region 4 EEGroup 0 Permanent

PSubarea 00JE Econ/Social Svcs EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Choose 01/01/1800 To 12/31/9999 STy.

Absence Quotas

Start Date	End Date	A...	Quota text	Start ded	End ded.	Number	Deduction
10/01/2008	10/31/2008	30	Sick Leave	10/16/2008	12/31/9999	8.00000	0.00000
10/01/2008	10/31/2008	31	Annual Leave/Vacation	10/16/2008	12/31/9999	14.66667	0.00000
09/01/2008	09/30/2008	30	Sick Leave	09/16/2008	12/31/9999	8.00000	7.00000
09/01/2008	09/30/2008	31	Annual Leave/Vacation	09/16/2008	12/31/9999	14.66667	0.00000
08/01/2008	08/31/2008	30	Sick Leave	08/16/2008	12/31/9999	8.00000	8.00000
08/01/2008	08/31/2008	31	Annual Leave/Vacation	08/16/2008	12/31/9999	14.66667	0.00000
07/01/2008	07/31/2008	30	Sick Leave	07/16/2008	12/31/9999	8.00000	8.00000
07/01/2008	07/31/2008	31	Annual Leave/Vacation	07/16/2008	12/31/9999	14.66667	0.00000

- Use *Absence Quotas (2006)* to view quota accrual once the *Time Evaluation* has processed.

# HRMS Activity



**Exercise:**  
**Display Absence Quotas**  
**Page 1**

# Review Questions

**1. Which infotypes affect Quota Accruals?**

**2. True or False?**

**Time evaluation is a process only ran by  
Department of Enterprise Services?**

# Section 2.

## Shared Leave

### How to donate and return quotas

# Shared Leave Overview

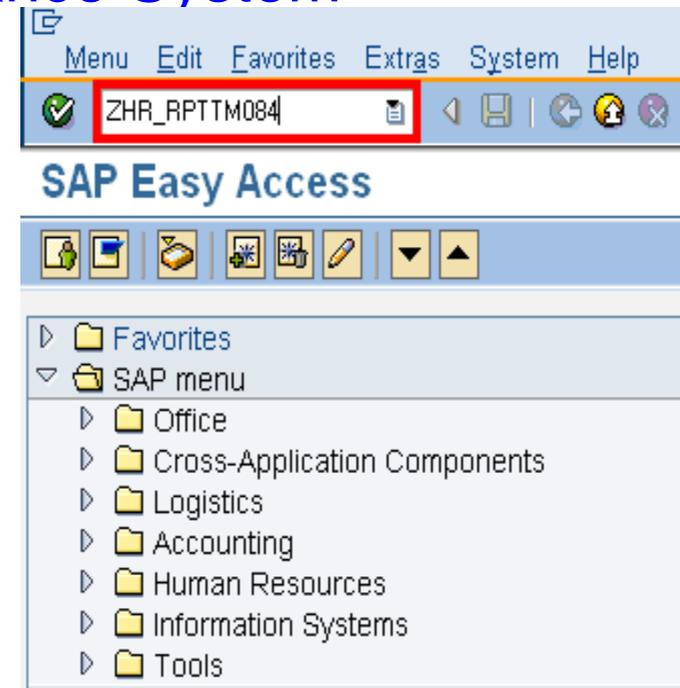
- Upon completion of this section this section you will be able to:
  - Verify an employees quota balance
  - Create Shared leave donations and returns
  - Convert a Personal Holiday for donation
  - Define how to return unused Shared Leave back to the donor

# Steps for Donating Shared Leave

1. Verify Quota Balance (**donor**)
2. Establish and verify base rate for Shared Leave (**donor and recipient**)
3. Create Shared Leave Eligibility (**donor and recipient**)
4. Create Shared Leave Donation (**donor**)
5. Verify the donation (**donor and recipient**)
6. Run a Time Evaluation (ZT60) (**recipient**)

# Verify the Quota Balance

- The ***Attendance System Change Report*** displays all employees who had attendance activity during the selected reporting period as well as their ending balance
- Refer to the user procedure [Attendance System Change report](#) on the OLQR.
- Access the Attendance System Change Report using the transaction code **ZHR\_RPTTM084**.
- Click  (Enter) to validate.



***Shared Leave***

# Attendance System Change Report

## ■ Fields to complete:

- *Period*
- *Personnel area*
- *Personnel Number*
- *Quota type*  
*(Optional)*
- *Deduction Period*

■ Verify  Only EEs with selected quotas is checked

■ Click  (**Execute**) to generate the report

Program Edit Goto System Help

Attendance System Change Report

Selections from Search helps Org. structure

Period

Today  Current month  Current year

Up to today  From today

Other period

Period To

Selection

Personnel Number

Employment status

Personnel area 1110

Personnel subarea

Employee group

Employee subgroup

Business area

Payroll area

Quota selection

Quota type to

Deduction period 10/01/2008 To 10/15/2008

Display

Only EEs with selected quotas All selected EEs

Only EEs with entitlement

EEs w/rem. ent. only

Only EEs w/compensation

EEs w/qta used only

EEs w/qta accrued only

Data format

Layout

Additional Data

Field Selections

# Attendance System Change Report

[List](#) [Edit](#) [Goto](#) [Views](#) [Settings](#) [System](#) [Help](#)

**Attendance System Change Report**

## State of Washington - HRMS Attendance System Change Report

**Report ID:** ZHR\_RPTTM084  
**User:** KELLYW  
**Run Date:** 01/13/2011  
**Period:** 01/01/1800 thru 12/31/9999

Personnel	Name	Quo...	Quota Type Text	Leave Ac
40000235	PHILLIPS, MICHAEL	30	Sick Leave	10/31/20
40000235	PHILLIPS, MICHAEL	31	Annual Leave/Vacation	10/31/20
40000235	PHILLIPS, MICHAEL	42	Personal Holiday - Shift	12/31/20

**Details**

Group description	Cell Content
Personnel Area Code	1110
Personnel Number	40000235
Personnel Sub Area Text	Exempt
Name	PHILLIPS, MICHAEL
Org Unit	30000492
Quota Type	30
SSN	500101186
Org Unit Abbreviation	AA
Quota Type Text	Sick Leave
Leave Accrual Date	10/31/2008
Job	50003259
Position	70005872
EE Group	B
Position Abbreviation	0131
Job Abbreviation	B2850
EE Group Text	Civil Service Exempt
Earned	272.00000
EE Sub Group Text	Monthly(M) OT Exem
Taken/Reported	34.50000

ent	Donated	Returned	Ending Bal
0	72.00000	40.00000	709.22000
0	0.00000	0.00000	129.76678
0	0.00000	0.00000	0.00000

Click on for a detailed view of the report.

# HRMS Activity



***Walkthrough:  
Run the Attendance System Change Report  
Page 3***

# Establish the Hourly Base Rate

## Step 2

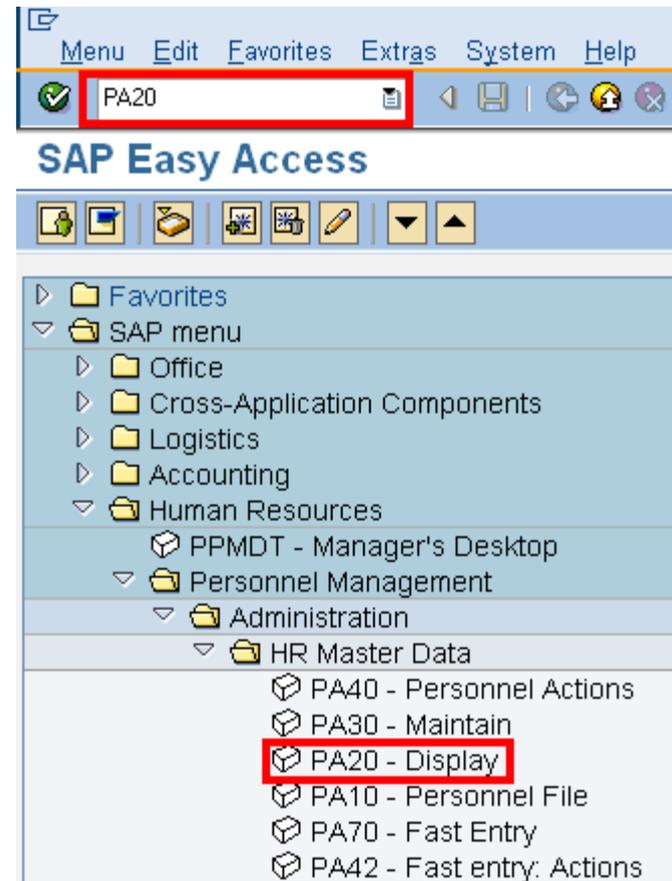
### Verify and Establish Base Rate

- When an employee decides to donate Shared Leave, the donor and the receiver both need to have their *Recurring Payments/Deductions (0014)* set up with the base rate wage type 1010.
- Check that the Start and End Date in *Recurring Payments/Deductions (0014)* covers the Shared Leave donation Start date.
  - The *Start date* needs to be the first day that the recipient is eligible to receive the donation.
  - Use the same logic when entering the *Start date* for the donor.
- The donor and the Shared Leave recipient's respective agencies will establish this wage type in an employee's personnel record.

# Step 2

## Verify and Establish Base Rate

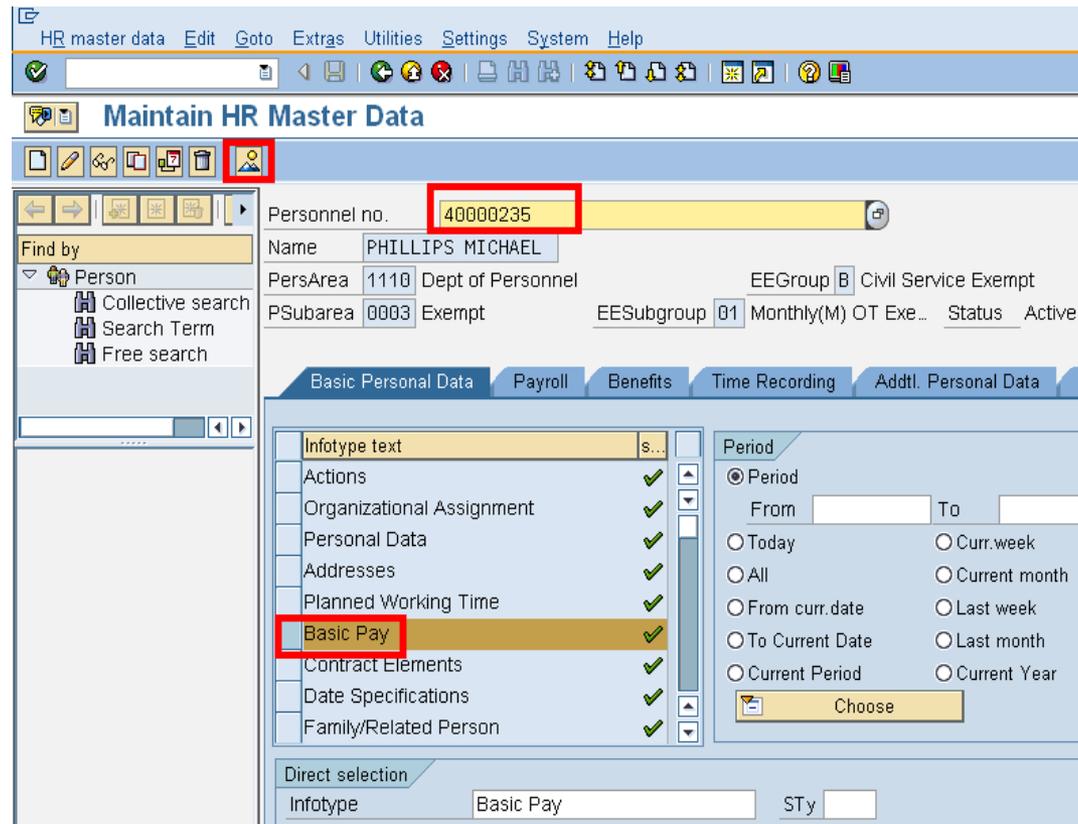
- To access the Base Rate infotype, follow menu path:  
Human Resources → Personnel Management → Administration → HR Master Data → Maintain
- You can also access the Base Rate infotype by using the transaction code **PA20** (Display HR Master data)



# Step 2

## Verify and Establish Base Rate

- Enter the employee's Personnel Number
- Click  (**Enter**) to validate
- Click the gray box to the left of *Basic Pay (0008)* to select
- Select the **All** radio button in the **Period** section
- Click  (**Overview**) for an overview of all actions



The screenshot shows the 'Maintain HR Master Data' window. The 'Personnel no.' field contains '40000235'. The 'Name' is 'PHILLIPS MICHAEL'. The 'PersArea' is '1110' and 'Dept of Personnel'. The 'EEGroup' is 'B' and 'Civil Service Exempt'. The 'PSubarea' is '0003' and 'Exempt'. The 'EESubgroup' is '01' and 'Monthly(M) OT Exe...'. The 'Status' is 'Active'. The 'Basic Pay' section is highlighted, and the 'All' radio button is selected in the 'Period' section.

Infotype text	s...	Period
Actions	✓	<input checked="" type="radio"/> Period
Organizational Assignment	✓	From <input type="text"/> To <input type="text"/>
Personal Data	✓	<input type="radio"/> Today <input type="radio"/> Curr.week
Addresses	✓	<input type="radio"/> All <input type="radio"/> Current month
Planned Working Time	✓	<input type="radio"/> From curr.date <input type="radio"/> Last week
Basic Pay	✓	<input type="radio"/> To Current Date <input type="radio"/> Last month
Contract Elements	✓	<input type="radio"/> Current Period <input type="radio"/> Current Year
Date Specifications	✓	<input type="button" value="Choose"/>
Family/Related Person	✓	

Direct selection  
Infotype Basic Pay STy

# Step 2

## Verify and Establish Base Rate

Overview Basic Pay (0008)

Payments and deductions

Personnel No. 40000235 Name PHILLIPS MICHAEL

PersArea 1110 Dept of Personnel EEGroup B Civil Service Exempt

PSubarea 0003 Exempt EESubgroup 01 Monthly(M) OT Exe... Status Active

Choose 01/01/1800 to 12/31/9999 STy.

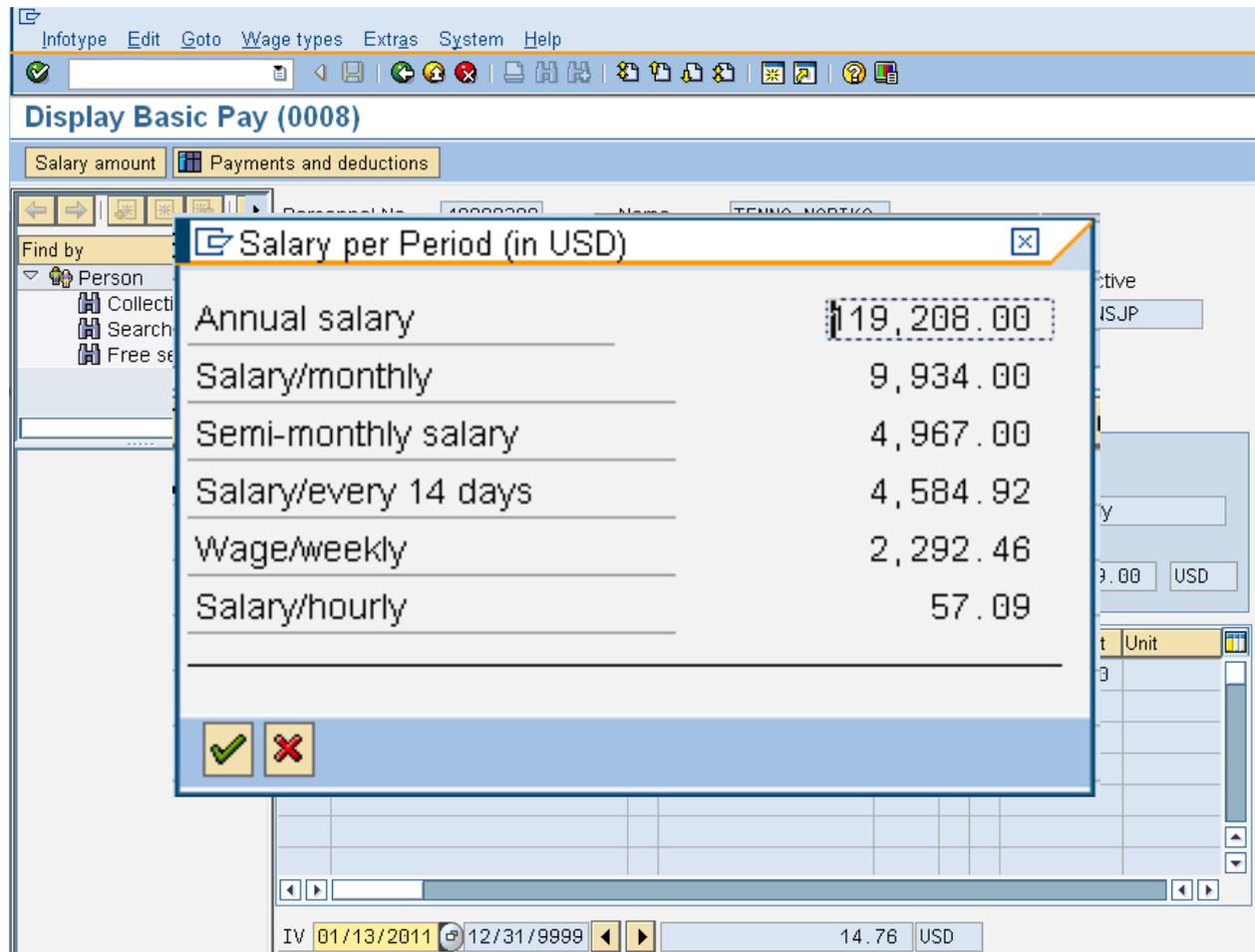
STy	Start Date	End Date	Ty.	P...	PS group	Lv	Amount	Curr...	Annual salary	Curr...
0	09/01/2008	12/31/9999	00	41	BAND 5	05	4,967.00	USD	119,208.00	USD
0	09/01/2007	08/31/2008	00	41	BAND 5	05	4,869.50	USD	116,868.00	USD
0	09/01/2006	08/31/2007	00	41	BAND 5	05	4,718.50	USD	113,244.00	USD
0	01/01/2006	08/31/2006	00	41	BAND 5	05	4,644.00	USD	111,456.00	USD

- Select the current record from the list
  - The current record will have an End Date of 12/31/9999
- Click  (Choose) to select the record

# Step 2

## Verify and Establish Base Rate

- Select **Salary amount**
- Write down the **Salary/ hourly amount**
- In the pop-up window, click  (**continue**) to continue
- Click  (**back**) to return to the previous screen



Display Basic Pay (0008)

Salary amount | Payments and deductions

Find by

Person

Collect

Search

Free se

Salary per Period (in USD)

Annual salary	19,208.00
Salary/monthly	9,934.00
Semi-monthly salary	4,967.00
Salary/every 14 days	4,584.92
Wage/weekly	2,292.46
Salary/hourly	57.09

IV 01/13/2011 12/31/9999 14.76 USD

# Step 2

## Verify and Establish Base Rate

- Now that we have the employee's current base rate, the next step is to validate or create the *action* on ***Recurring Payments/Deduction*** (0014).

### Step 2

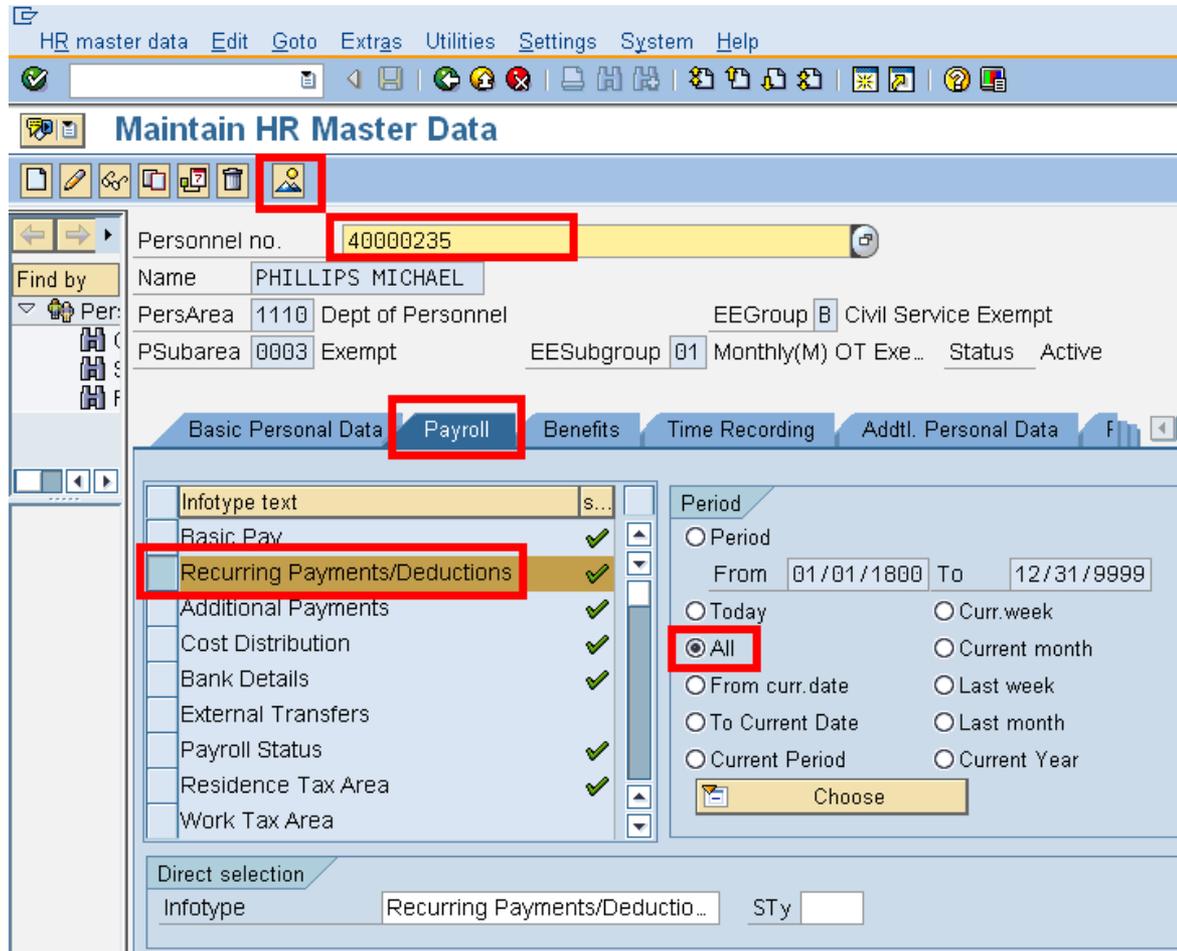
#### Verify and Establish Base Rate

- ✓ ■ When an employee decides to donate Shared Leave, the donor and the receiver both need to have their *Recurring Payments/Deductions (0014)* set up with the base rate wage type 1010.
- Check that the Start and End Date in *Recurring Payments/Deductions (0014)* covers the Shared Leave donation Start date.
  - The *Start date* needs to be the first day that the recipient is eligible to receive the donation.
  - Use the same logic when entering the *Start date* for the donor.
- The donor and the Shared Leave recipient's respective agencies will establish this wage type in an employee's personnel record.

# Step 2

## Verify and Establish Base Rate

- Enter /NPA30 in the command field
- Click  Enter to validate
- Verify the Personnel Number
  - Select the  tab
- Click the gray box to the left of 
- Select **All** radio button in the Period selection
- Click  (**Overview**) to display all



The screenshot shows the 'Maintain HR Master Data' application window. The 'Personnel no.' field contains '40000235'. The 'Name' is 'PHILLIPS MICHAEL'. The 'PersArea' is '1110' and 'Dept of Personnel'. The 'EEGroup' is 'Civil Service Exempt'. The 'PSubarea' is '0003' and 'Exempt'. The 'EESubgroup' is '01' and 'Monthly(M) OT Exe...'. The 'Status' is 'Active'.

The 'Payroll' tab is selected. The 'Recurring Payments/Deductions' row is highlighted. The 'Period' section has the 'All' radio button selected. The 'From' date is '01/01/1800' and the 'To' date is '12/31/9999'.

The 'Direct selection' section shows the 'Infotype' as 'Recurring Payments/Deductio...' and the 'STy' as 'STy'.

***Shared Leave-Establish Base Rate***

# Step 2

## Verify and Establish Base Rate cont'd.

Infotype Edit Goto Extras System Help

List Recurring Payments/Deductions (0014)

Personnel No. 40000235 Name PHILLIPS MICHAEL

PersArea 1110 Dept of Personnel EEGroup B Civil Service Exempt

PSubarea 0003 Exempt EESubgroup 01 Monthly(M) OT Exe... Status Active

Choose 31/01/1800 to 12/31/9999 STy.

Wage type	Wage Type Long Text	From	To	O	Amount	Crcy
1010	Base Rate for shared l...	10/25/2006	12/31/9999		75.39	USD

- If a wage type 1010 (Base rate for shared leave) already exists, **verify** the **rate** is still **correct** as HRMS **does not** automatically **update** wage type 1010 once an employee receives a pay **increase** or **decrease**.
- You will also need to **verify** that the dates cover the **donation** period.

# Step 2

## Verify and Establish Base Rate cont'd.

Infotype Edit Goto Extras System Help

List Recurring Payments/Deductions (0014)

Personnel No. 40000005 Name LYNCH JUDY

PersArea 1110 Dept of Personnel EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active

Choose 01/01/1800 to 12/31/9999 STy.

Wage type	Wage Type Long Text	From	To	O	Amount	Crcy
2661	Charity	12/16/2007	04/15/2008	A	12.50	USD

- If there is not a Wage type 1010 Click  (**Create**) to create a new record

# Step 2

## Verify and Establish Base Rate cont'd.

- Fields to complete:

- *Start*
- *Wage Type*
- *Amount*

- Click  (**Enter**) to validate
- Click  (**Save**) to save and continue

Infotype Edit Goto Extras System Help

Create Recurring Payments/Deductions (0014)

Personnel No. 40000005 Name LYNCH JUDY

PersArea 1110 Dept of Personnel EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exe... Status Active

Start 01/01/1800 to 12/31/9999

Recurring Payments/Deductions

Wage Type

Amount  USD

Number/unit

Assignment Number

Reason for Change

Payment dates

Payment model

# HRMS Activity



***Walkthrough:  
View hourly base rate and create  
recurring payment  
Page 6***

# Step 3

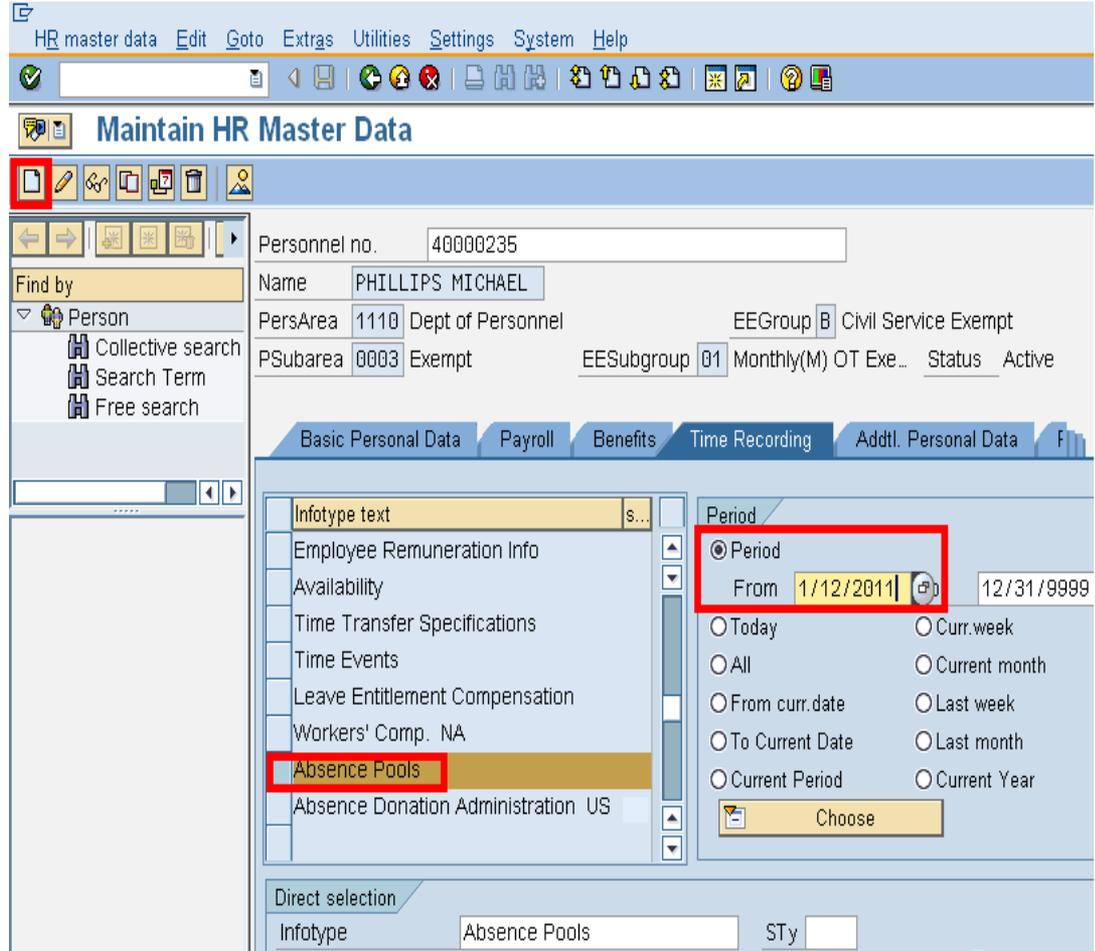
## Create Shared Leave Eligibility Overview

- Use *Absence Pools* (0696) to establish eligibility for the **donor and recipient.**
- Verify the Begin and End Dates for *Absence Pools* (0696) are covering the Shared Leave donation period.
- For an employee to donate or receive leave, they must be eligible.

# Step 3

## Create Shared Leave Eligibility

- Enter PA30 in the Command field.
- Select the **Time Recording** tab
- Verify the Personnel Number
- Click  (Enter) to validate
- Enter the From date
- Click the gray box to the left of *Absence Pools* (0696) to select
- Click  (Create) to create a new record



HR master data Edit Goto Extras Utilities Settings System Help

Maintain HR Master Data

Personnel no. 40000235

Name PHILLIPS MICHAEL

PersArea 1110 Dept of Personnel EEGroup B Civil Service Exempt

PSubarea 0003 Exempt EESubgroup 01 Monthly(M) OT Ex... Status Active

Basic Personal Data Payroll Benefits **Time Recording** Addtl. Personal Data F

Infotype text s... Period

Employee Remuneration Info  Period

Availability From 1/12/2011 12/31/9999

Time Transfer Specifications  Today  Curr.week

Time Events  All  Current month

Leave Entitlement Compensation  From curr.date  Last week

Workers' Comp. NA  To Current Date  Last month

**Absence Pools**  Current Period  Current Year

Absence Donation Administration US Choose

Direct selection

Infotype Absence Pools STy

### Note:

To find the Absence Pools scroll down towards the bottom of the Time Recording Tab

**Shared Leave**

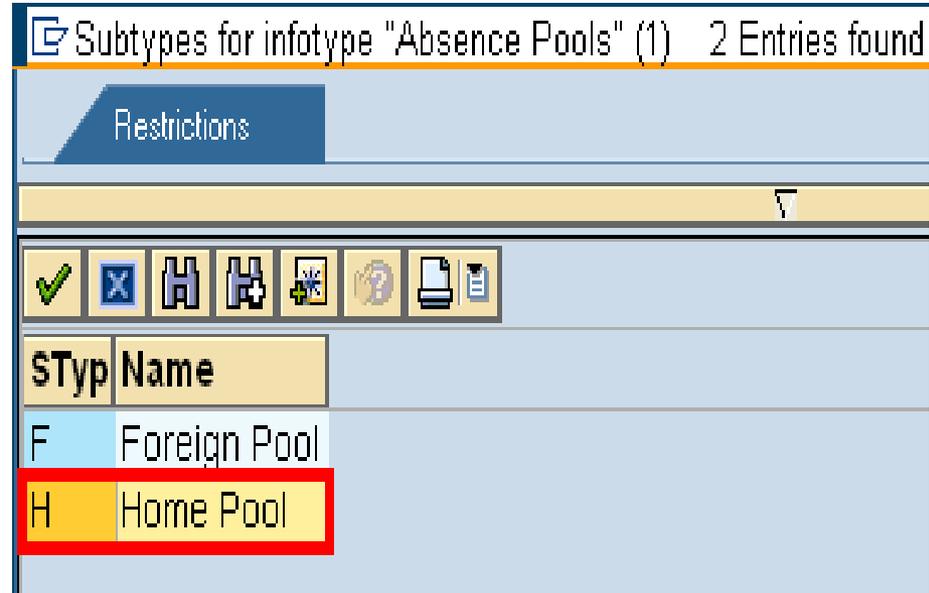
# Step 3

## Create Shared Leave Eligibility cont'd.

- In the pop-up window select  Home Pool

### **Note:**

The Foreign Pool is to be selected only if creating the eligibility for the Uniformed Services Pool, or Sick Leave Pool.



# Step 3

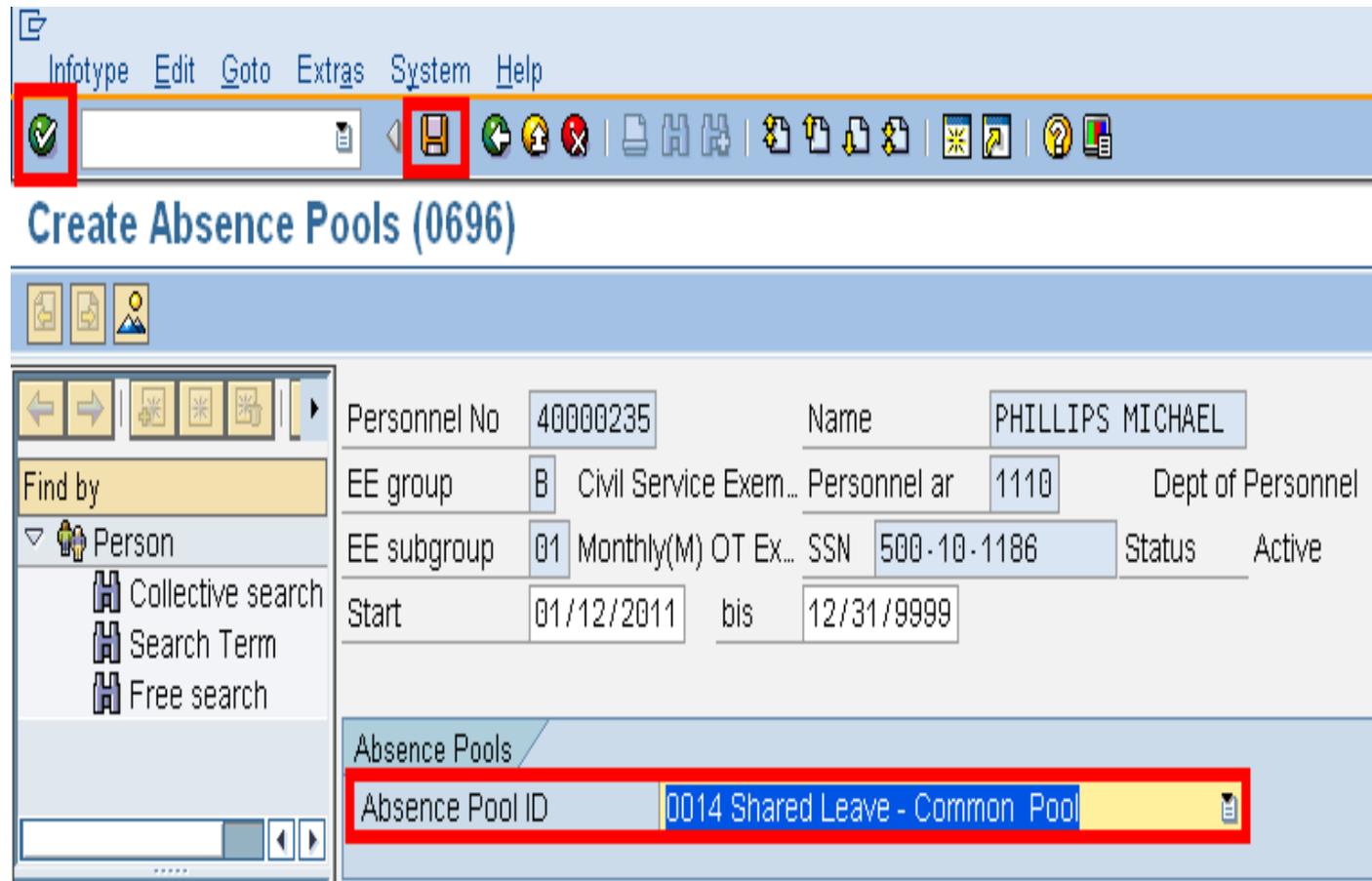
## Create Shared Leave Eligibility cont'd.

### Fields to complete:

– *Absence Pool ID*

Click  (Enter) to validate

Click  (Save) to save



Infotype Edit Goto Extras System Help

Create Absence Pools (0696)

Personnel No 40000235 Name PHILLIPS MICHAEL

EE group B Civil Service Exem... Personnel ar 1110 Dept of Personnel

EE subgroup 01 Monthly(M) OT Ex... SSN 500-10-1186 Status Active

Start 01/12/2011 bis 12/31/9999

Absence Pools

Absence Pool ID 0014 Shared Leave - Common Pool

***Shared Leave***

# Create the Donation

# Step 4

## Create Shared Leave Donation Overview

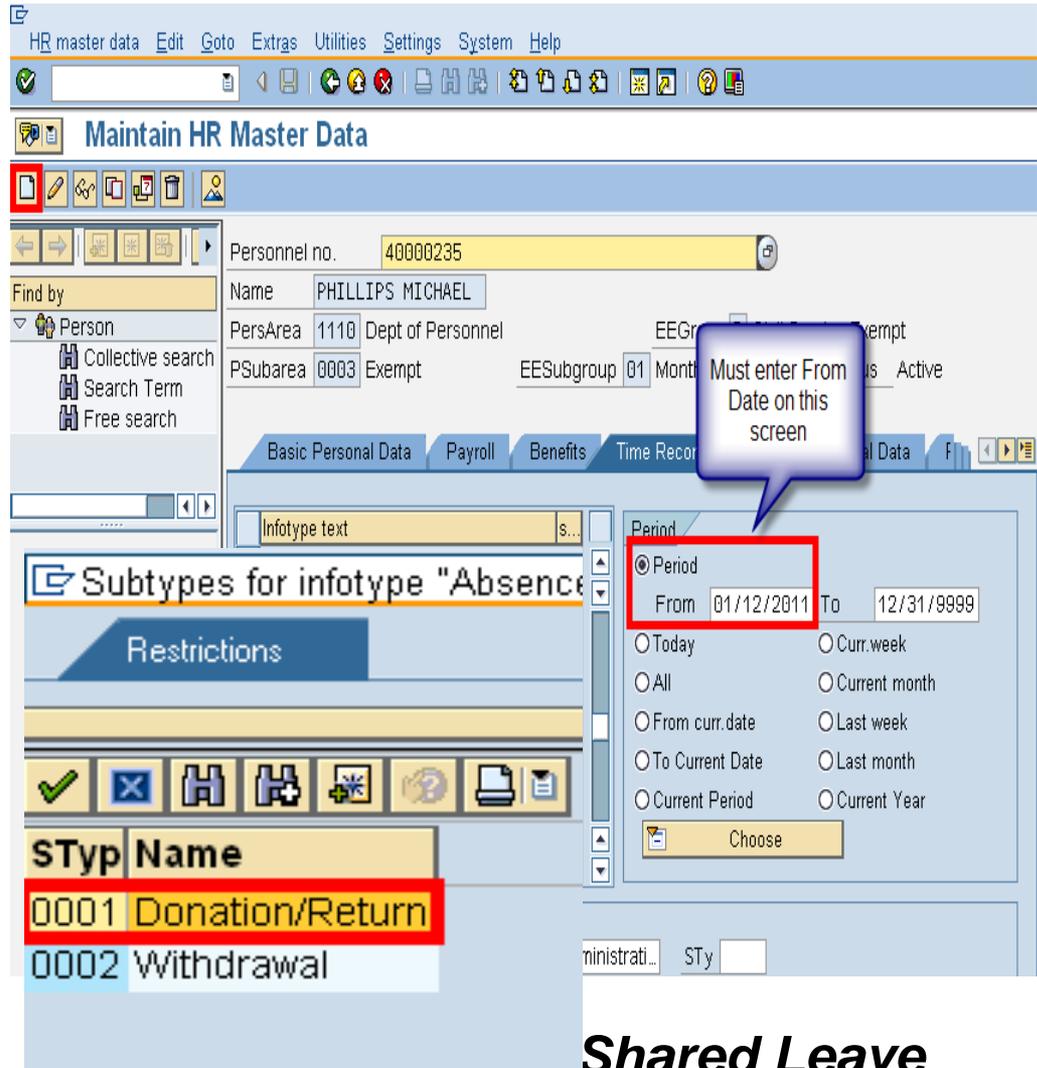
### ■ When leave is donated:

- **Within your agency** – Complete steps 1-3 for both the donor and the recipient.
- **Outside your agency** – Ensure that either the donor or recipient (whichever is in your agency) has steps 1-3 completed. Communicate with the other agency to ensure both sides (donor and recipient agency) have completed appropriate steps.

# Step 4

## Create Shared Leave Donation

- Enter PA30 in the Command field
- Select the **Time Recording** tab
- Enter the Personnel Number of the **DONOR**
- Click  (Enter) to validate
- Enter the from date
- Click the gray box to the left of **Absence Donation Administration US**
- Click  (Create) to create a new record
- In the pop-up window select **Donation**



HR master data Edit Goto Extras Utilities Settings System Help

Maintain HR Master Data

Personnel no. 40000235

Name PHILLIPS MICHAEL

PersArea 1110 Dept of Personnel

PSubarea 0003 Exempt

EESubgroup 01 Month

Basic Personal Data Payroll Benefits Time Record

Find by

Person

Collective search

Search Term

Free search

Infotype text

Subtypes for infotype "Absence"

Restrictions

Period

Period

From 01/12/2011 To 12/31/9999

Today  Curr.week

All  Current month

From curr.date  Last week

To Current Date  Last month

Current Period  Current Year

Choose

STyp	Name
0001	Donation/Return
0002	Withdrawal

ministrati... STy

**Shared Leave**

# Step 4

## Create Shared Leave Donation

### Fields to complete:

- Abs. quota type
- Number/Unit
- Personnel No. of the Recipient



Check 'Amount related'

- Check "Employee"
- Target Abs. Quota

Click  (Enter) to validate

Click  (Save) to save

Infotype Edit Goto Extras System Help

Create Absence Donation Administration US(0613)

Personnel No 40000235 Name PHILLIPS MICHAEL  
 EE group B Civil Service Exem... Personnel ar 1110 Dept of Personnel  
 EE subgroup 01 Monthly(M) OT Ex... SSN 500-10-1  
 Start 01/12/2011

Find by  
 Person  
 Collective search  
 Search Term  
 Free search

Absence Donation Administration US

Abs.quota type	30 Sick Leave ( 757.22000 H...
Number/Unit	25.00 Hours

Donor's Information

Home Pool  
 Home Pool ID

Foreign Pool  
 Foreign Pool ID

Employee	<input checked="" type="checkbox"/> Amount Related
Personnel no.	40000196 SPELJAK LULZIM
Target Abs. quota	41 Shared Leave

Recipient's Information

External Recipient  
 Ext. Person  
 Absence Quota Type

**Shared Leave**

# Verify the donation

# Step 5

## Verify the Donation Overview

### ➤ Donor

- HRMS automatically creates a quota record on *Time Quota Compensation* (0416) to reduce the balance.

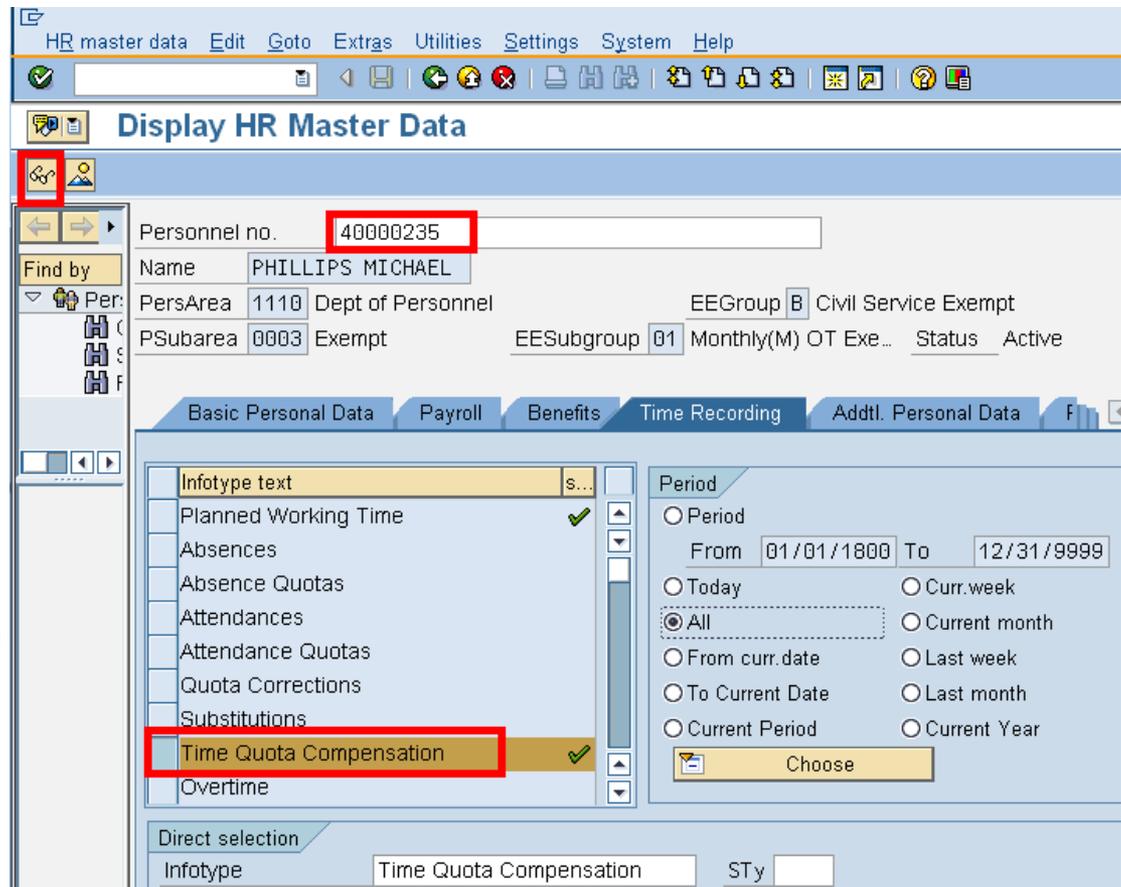
### ➤ Recipient

- HRMS automatically creates a quota record on *Quota Correction* (2013) to create/increase the shared leave quota balance.

# Step 5

## Verify the Donation (Donor)

- Enter the transaction code **PA20** in the command field
- Click  (Enter) to validate
- Enter the **Donor's** personnel number
- Select the gray box to the left  of to select
- Click  (Display)



HR master data Edit Goto Extras Utilities Settings System Help

Display HR Master Data

Personnel no. 40000235

Name PHILLIPS MICHAEL

PersArea 1110 Dept of Personnel EGroup B Civil Service Exempt

PSubarea 0003 Exempt ESubgroup 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 01/01/1800 To 12/31/9999

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

# Step 5

## Verify the Donation (Donor) cont'd.

Infotype Edit Goto Extras System Help

Display Time Quota Compensation (0416)

Personnel No. 40000235 Name PHILLIPS MICHAEL

PersArea 1110 Dept of Personnel EEGroup B Civil Service Exempt

PSubarea 0003 Exempt EESubgroup 01 Monthly(M) OT Exe... Status Active

Start 01/12/2011 Chg. 01/13/2011 KELLYW

Comp. method 1000 Free compensation

Compensation specifications

Automatic compensation

Manual compensation

Time quota type 30 Sick Leave

Compensation rule 000

No. to compensate 25.00000

Do not account

Absence quotas

ATy	Quota text	Entitl.	Unit	Comp.	Rem.
30	Sick Leave	591.20000	Hours	25.00000	380.22000

- Use the  (Back) to return to Maintain HR Master Data

***Shared Leave***

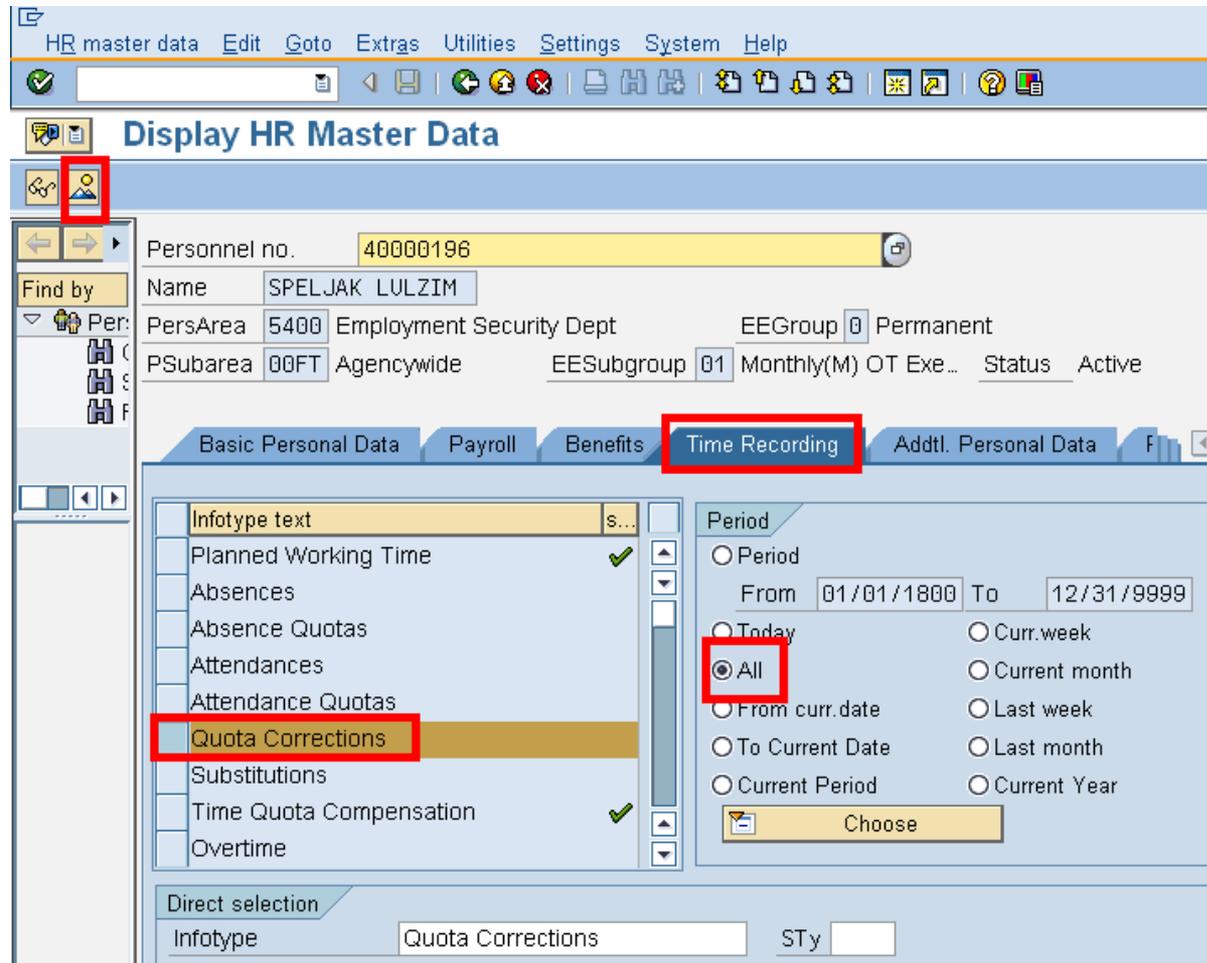
# Step 5

## Verify the Donation (Recipient)

### Fields to complete:

- Personnel Number-  
**Recipient**
- Select Time Recording Tab
- Enter Period
- Select Quota Corrections

- Click  (Display) to display all



HR master data Edit Goto Extras Utilities Settings System Help

Display HR Master Data

Personnel no. 40000196

Name SPELJAK LULZIM

PersArea 5400 Employment Security Dept EEGroup 0 Permanent

PSubarea 00FT Agencywide 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 01/01/1800 To 12/31/9999

Today  Curr. week

All  Current month

From curr. date  Last week

To Current Date  Last month

Current Period  Current Year

Choose

Direct selection

Infotype Quota Corrections STy

# Step 5

## Verify the Donation (Recipient) cont'd.

Infotype Edit Goto Extras System Help

Display Quota Corrections (2013)

Personal work schedule Activity allocation Cost assignment External services

Personnel No 40000196 Name SPELJAK... Status Active

EE group 0 Permanent Personnel ar 5400 Employment Security Dept

WS rule R045 2Wk:M-Th... SSN 500.10.1147

Start 01/12/2011

Absence quota type 41 Shared Leave

Change accrual entitlement

Quota number 118.09000 Hours

Increase generated entitlement  
 Reduce generated entitlement  
 Replace generated entitlement

Change transfer time

Transfer Y Only transfer quota correction immedia...

This number is based on the **Base Rate (WT 1010)** for each employee.

# Transfer the donation

# Step 6

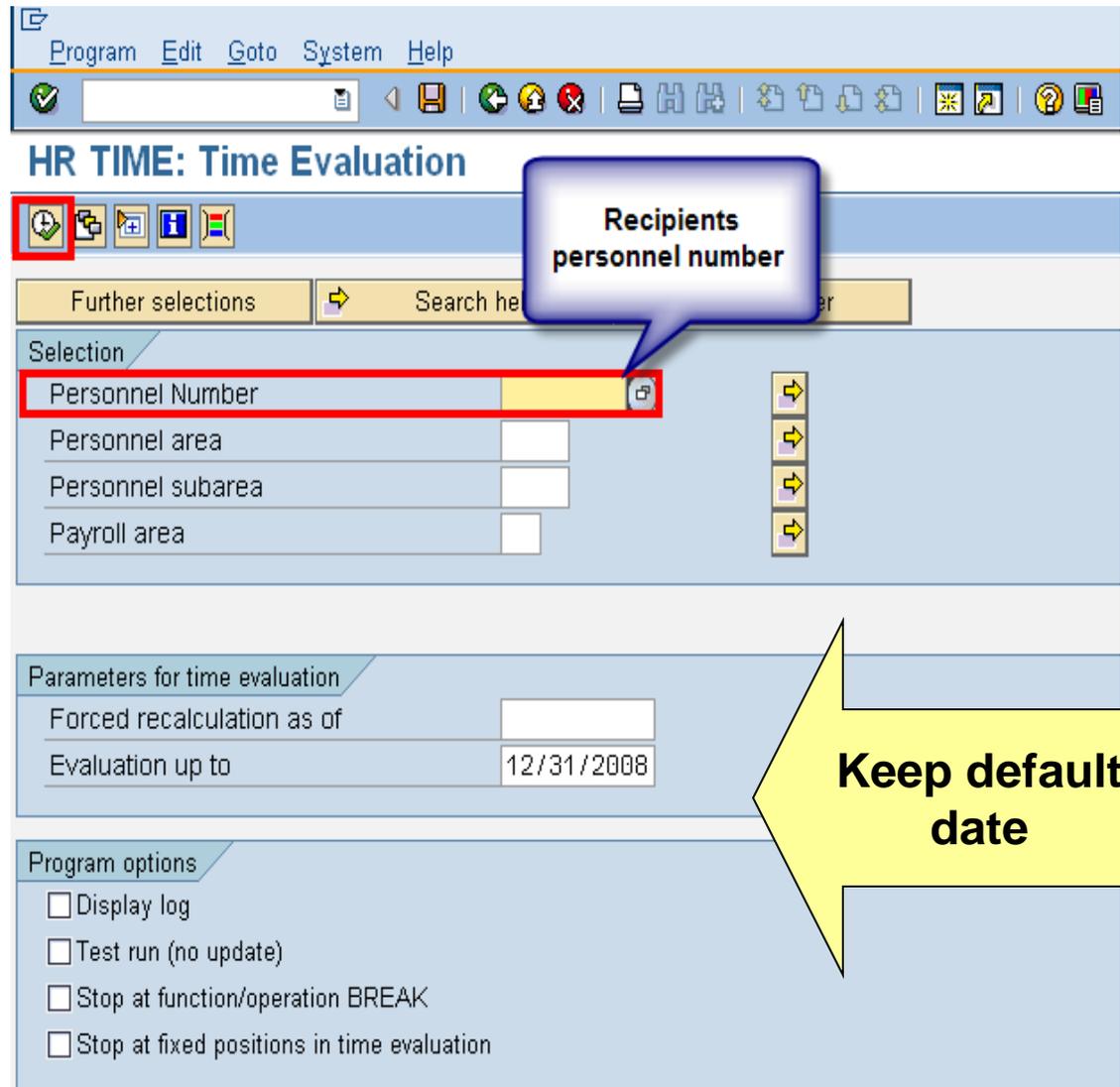
## Transfer the Donation Overview

- Completing the transfer will update the quota balances for the recipient, making them available immediately.
  - This also reduces the donor's quota balances as well.
- Helpful in expediting the donation process.

# Step 6

## Transfer the Donation

- Enter the transaction code **ZT60** in the command field on the Easy Access Screen
- Click  (Enter) to validate
- Fields to complete
  - *Personnel number*
  - *Evaluation up to*
- Click  (Execute) to generate report



Program Edit Goto System Help

HR TIME: Time Evaluation

Further selections Search he

Selection		
Personnel Number		
Personnel area		
Personnel subarea		
Payroll area		

Parameters for time evaluation

Forced recalculation as of

Evaluation up to 12/31/2008

Program options

Display log

Test run (no update)

Stop at function/operation BREAK

Stop at fixed positions in time evaluation

Recipients personnel number

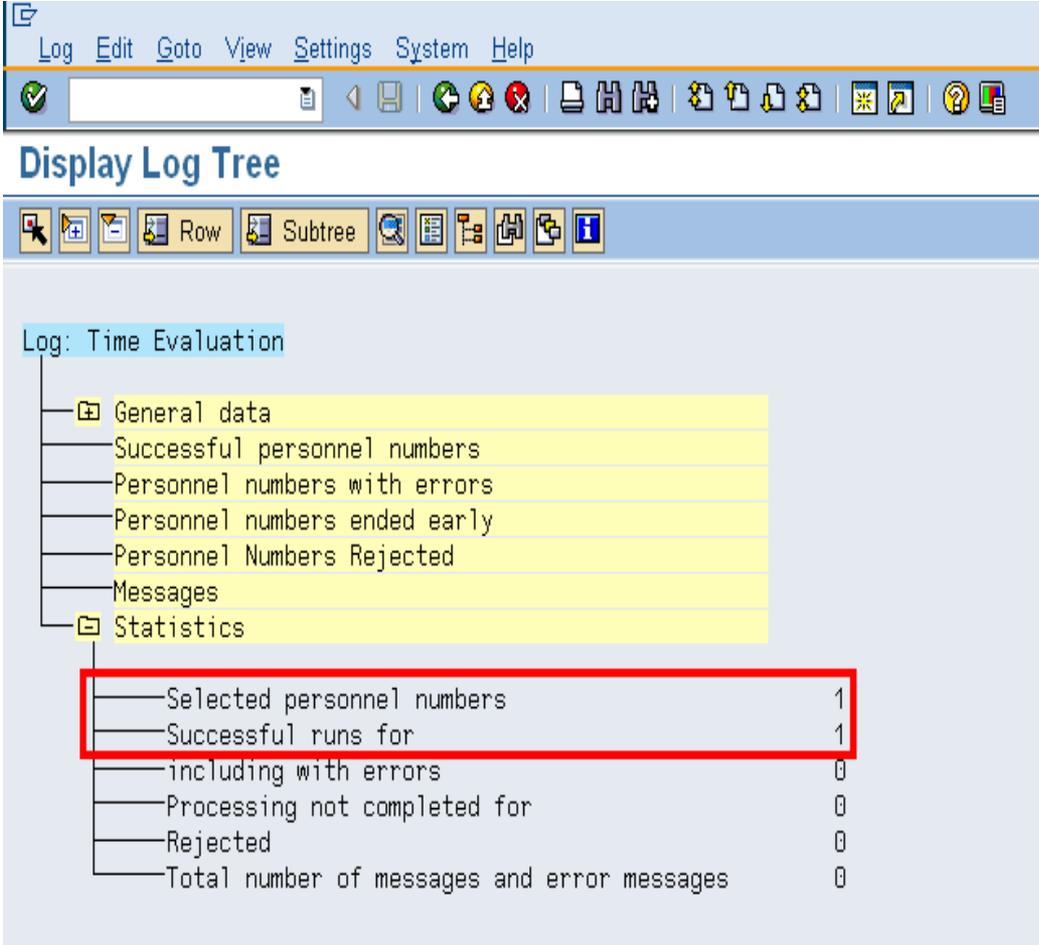
Keep default date

***Shared Leave***

# Step 6

## Transfer the Donation cont'd.

- Verify the time transfer was successful
- Click  (Exit) and return to the SAP Easy Access screen



The screenshot shows the SAP 'Display Log Tree' window. The log title is 'Log: Time Evaluation'. The tree structure is as follows:

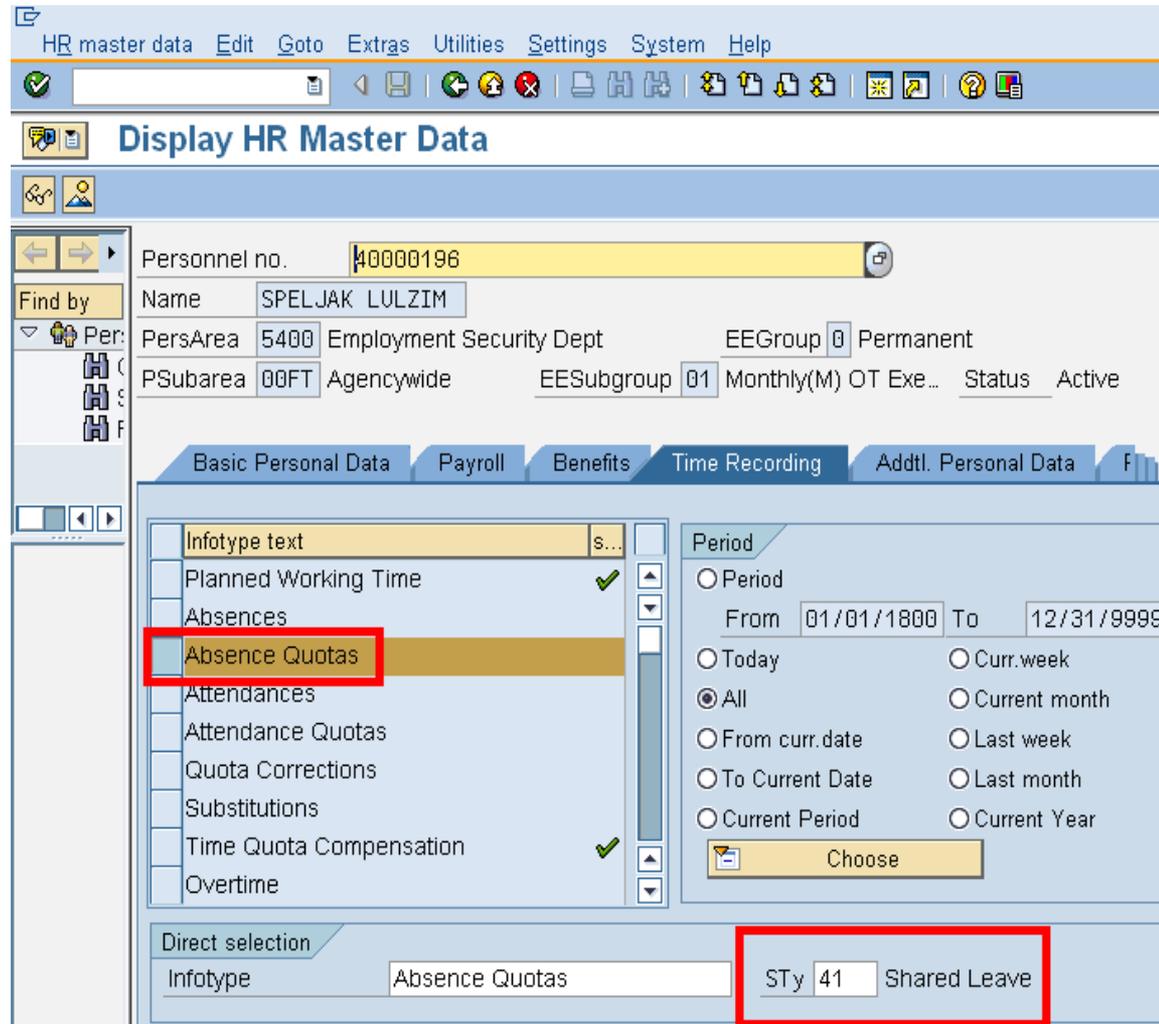
- General data
  - Successful personnel numbers
  - Personnel numbers with errors
  - Personnel numbers ended early
  - Personnel Numbers Rejected
- Messages
- Statistics
 

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

The 'Selected personnel numbers' and 'Successful runs for' rows in the Statistics section are highlighted with a red box, indicating a successful transfer of 1 personnel number.

# Step 6B. Verify the Donation

- Enter the transaction code **/NPA20** in the command field
- Enter the **Recipients** personnel number
- Select the **Time Recording** tab
- Select All in the Period selection
- Select **Absence Quotas**
- Enter **41- Shared Leave** into STY
- Click  (Overview) to display all



The screenshot displays the 'Display HR Master Data' window. The 'Time Recording' tab is selected. The 'Absence Quotas' option is highlighted in the list on the left. The 'Period' section shows 'All' selected. The 'Direct selection' section shows 'Absence Quotas' selected and 'STy 41 Shared Leave' entered in the text field.

HR master data Edit Goto Extras Utilities Settings System Help

Display HR Master Data

Personnel no. 40000196

Name SPELJAK LULZIM

PersArea 5400 Employment Security Dept EEGroup 0 Permanent

PSubarea 00FT Agencywide EESubgroup 01 Monthly(M) OT Exe... Status Active

Basic Personal Data Payroll Benefits Time Recording Addtl. Personal Data F

Infotype text s...

Planned Working Time ✓

Absences

**Absence Quotas**

Attendances

Attendance Quotas

Quota Corrections

Substitutions

Time Quota Compensation ✓

Overtime

Period

Period

From 01/01/1800 To 12/31/9999

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 41 Shared Leave

# Step 6B. Verify the Donation con't.d

Infotype Edit Goto Extras System Help

Overview Absence Quotas (2006)

Choose

Personnel No. 40000196 Name SPELJAK LULZIM

PersArea 5400 Employment Security Dept EEGroup 0 Permanent

PSubarea 00FT Agencywide EESubgroup 01 Monthly(M) OT Exe... Status Active

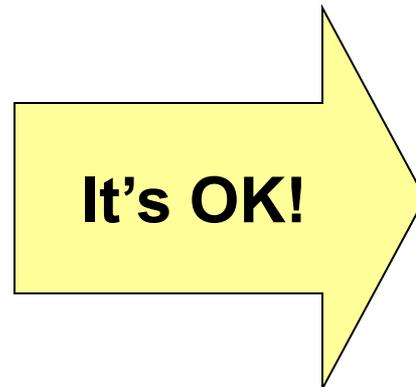
Choose 31/01/1800 To 12/31/9999 STy. 41

Start Date	End Date	A...	Quota text	Start ded	End ded.	Number	Deduction
01/12/2011	01/12/2011	41	Shared Leave	01/12/2011	12/31/9999	118.09000	0.00000

- Start Date and End Date=The day of the donation
- Absence Quota and Quota Text= Type of quota donated
- Start ded and End ded: Time frame of the donation
- Number= Amount of hours received by the recipient

# Shared Leave - Troubleshooting

- Start over!
  - If an error was found when verifying the quota records, use the trashcan on the *Shared Leave Donation (613)* just created.
  - This will automatically remove the ***Time Quota Compensation (0416)*** and ***Quota Correction (2013)*** that was created for the donation.
  - Then follow the steps for creating the donation and run the *Time Evaluation* process to create the new record.
- If a change was made to an existing ***Shared Leave Donation (0613)*** using the pencil, in some cases the ***Time Quota Compensation (416)*** record for the donor disappears and breaks the dynamic action.



***Shared Leave***

# HRMS Activity



**Exercise:**  
**Create Single-Agency Shared Leave**  
**Donation**  
**Page 10**

# Summary of Donating Shared Leave

- We have walked through the steps required for both the recipient and donor of shared leave.
- Identified when to communicate if the employees are in different agencies.
- Explained the dynamic action that occurs when the records are created and identified some troubleshooting tips when an error occurs.



HRMS does not track the number of hours donated from each donor. This is a manual process by the agency.

# Review Questions

**1. True or False:**

When an employee has a pay increase, HRMS automatically updates the employees base rate on *Recurring Payments/Deductions* (0014)?

---

**2.** Is it required to create a Shared Leave Donation for both the donor and the recipient?

---

**3. True or False:**

If an error is found on the Absence Donation Administration US (0613) , you should use the **Change** (pencil) to make the correction?

---

---

# Donating a Personal Holiday

# Donating a Personal Holiday Overview

Employee's may donate all or part of the Personal Holiday for shared leave.

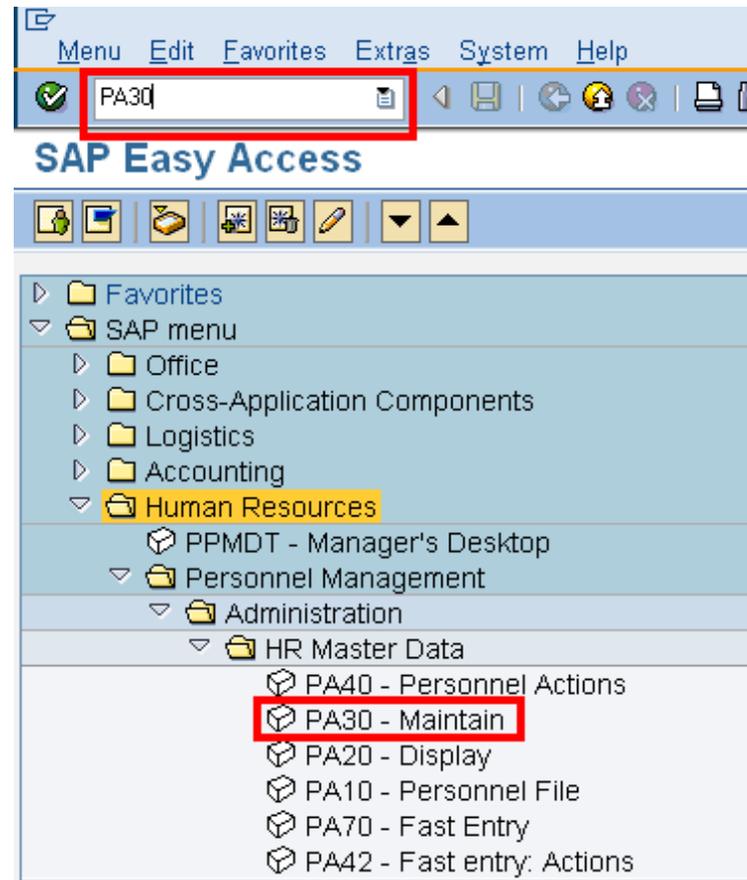
Chapter 357-31-090 WAC Holiday and Leave

HRMS stores as "one" day unit. Must be converted to hours so the hours can be donated.

- (1) Full-time employees receive personal holiday pay for the number of hours they are scheduled to work on the day.
- (2) Part-time employees are entitled to the number of paid hours for a personal holiday on a pro rata basis in accordance with WAC 357-31-020.

# Donating a Personal Holiday cont'd.

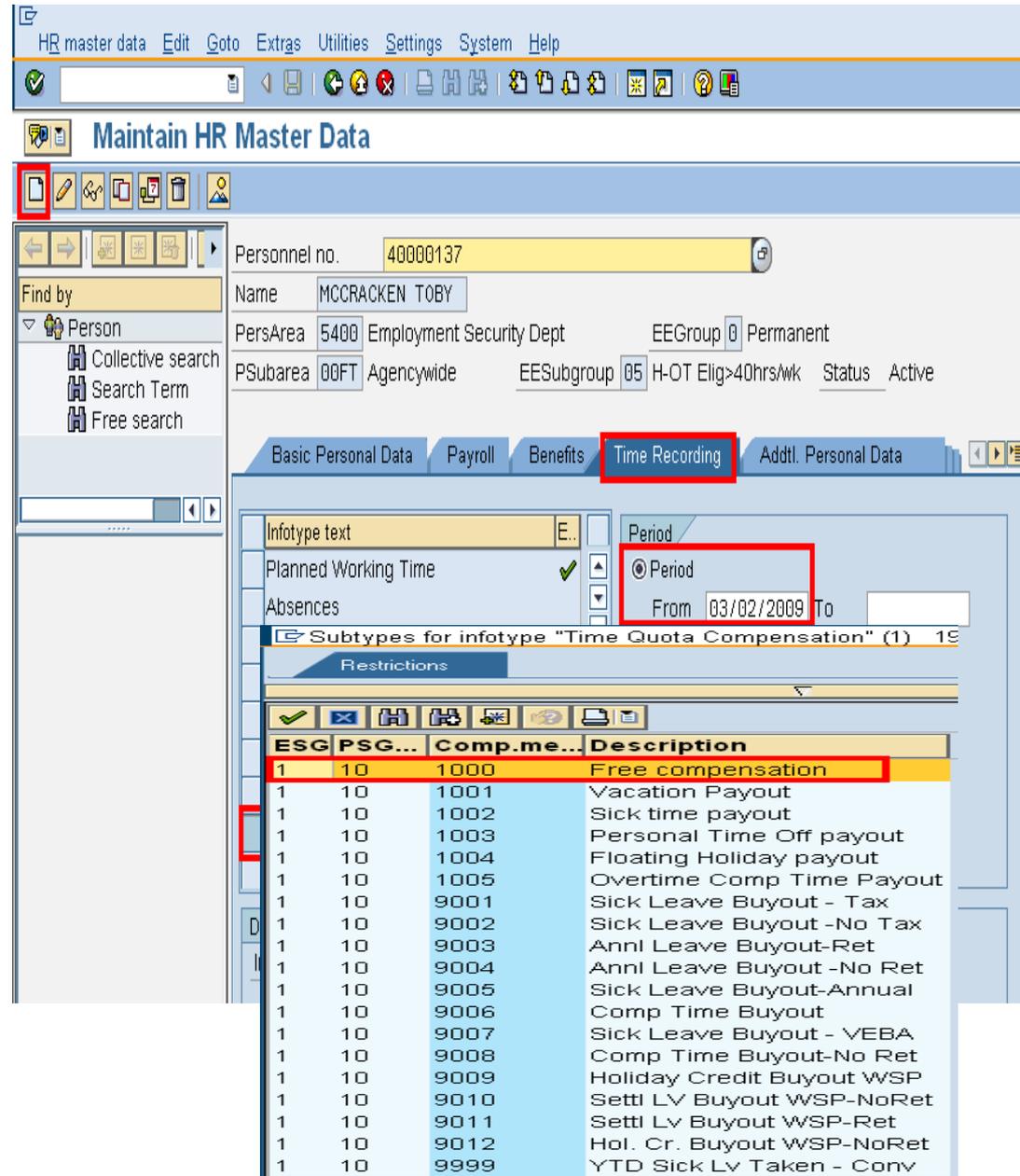
- To display HR Master Data, follow menu path: Human Resources → Personnel Management → Administration → HR Master Data → Maintain
- You can also access the infotype by using the transaction code **PA30** (Maintain HR Master data)



# Step 1. Decrease one day from Quota

## Type 42

- Enter Personnel Number
- Click  (Enter) to validate
- Select the **Time Recording** tab
- Enter the **From** date
- Click the gray box to the left of **Time Quota Compensation** to select
- Click  (Create) to create a new record
- Select **1000** (Free-compensation)



HR master data Edit Goto Extras Utilities Settings System Help

Maintain HR Master Data

Personnel no. 40000137

Name MCCracken TOBY

PersArea 5400 Employment Security Dept EESubgroup 0 Permanent

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

Basic Personal Data Payroll Benefits **Time Recording** Addtl. Personal Data

Infotype text E.. Period

Planned Working Time ✓

Absences

Period  Period

From 03/02/2009 To

Subtypes for infotype "Time Quota Compensation" (1) 19

Restrictions

ESG	PSG...	Comp.me...	Description
1	10	1000	Free compensation
1	10	1001	Vacation Payout
1	10	1002	Sick time payout
1	10	1003	Personal Time Off payout
1	10	1004	Floating Holiday payout
1	10	1005	Overtime Comp Time Payout
1	10	9001	Sick Leave Buyout - Tax
1	10	9002	Sick Leave Buyout -No Tax
1	10	9003	Annl Leave Buyout-Ret
1	10	9004	Annl Leave Buyout -No Ret
1	10	9005	Sick Leave Buyout-Annual
1	10	9006	Comp Time Buyout
1	10	9007	Sick Leave Buyout - VEBA
1	10	9008	Comp Time Buyout-No Ret
1	10	9009	Holiday Credit Buyout WSP
1	10	9010	Settl LV Buyout WSP-NoRet
1	10	9011	Settl LV Buyout WSP-Ret
1	10	9012	Hol. Cr. Buyout WSP-NoRet
1	10	9999	YTD Sick LV Taken - Conv

# Step 1. Decrease one day from Quota

## Type 42

### Fields to complete:

- Time Quota type
- No. to compensate



**Check Do not account**

Click  (Enter) to validate

Click  (Save) to save

Infotype Edit Goto Extras System Help

### Create Time Quota Compensation (0416)

Compensate 

Personnel No. 40000137 Name MCCRACKEN TOBY  
 PersArea 5400 Employment Security Dept EEGroup 0 Permanent  
 PSubarea 00FT Agencywide EESubgroup 05 H-OT Elig>40hrs/wk Status Active  
 Start 03/02/2009  
 Comp. method 1000 Free compensation

Find by  
 Person  
 Collective search  
 Search Term  
 Free search

Compensation specifications

Automatic compensation  
 Manual compensation

Time quota type 42 Personal Holiday - Shift

Compensation rule

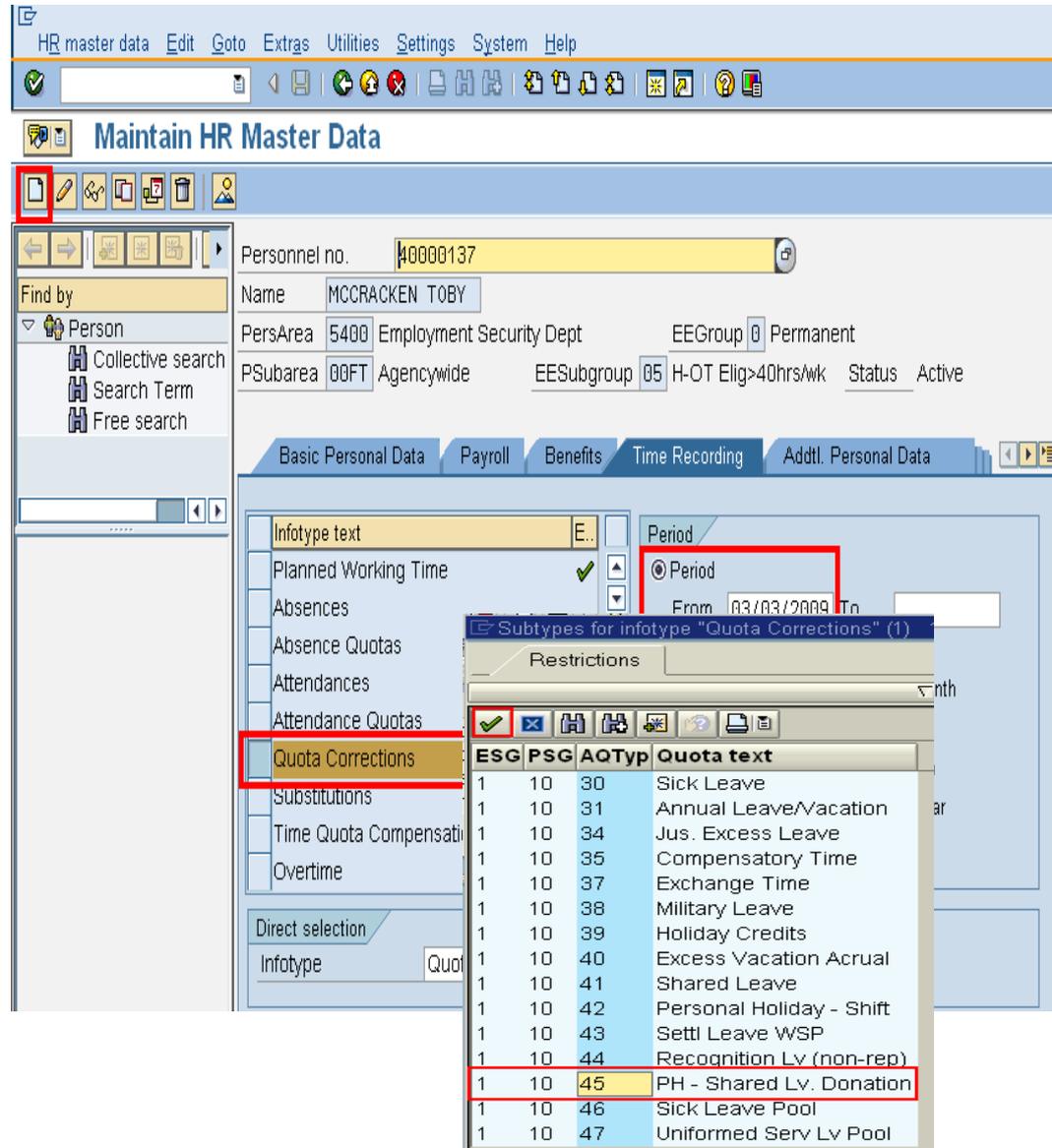
No. to compensate 1.00000  
 Do not account

Absence quotas

ATy	Quota text	Entitl.	Unit	Comp.	Rem.
	30 Sick Leave	727.40000	Hours	0.00000	678.900
	30 Sick Leave	8.00000	Hours	0.00000	8.000

# Step 2. Increase Quota Type 45

- Enter Personnel Number
- Click  (Enter) to validate
- Select the **Time Recording** tab
- Enter the Start Date
- Click the gray box to the left of **Quota Corrections** to select
- Click  (Create) to create new record
- Select **45** (PH-Shared Lv Donation)



The screenshot shows the 'Maintain HR Master Data' window for personnel number 40000137, MCCracken Toby. The 'Time Recording' tab is selected. A search for 'Quota Corrections' is performed, and a list of subtypes is displayed. The subtype '45 PH - Shared Lv. Donation' is highlighted.

Personnel no. 40000137  
 Name MCCRACKEN TOBY  
 PersArea 5400 Employment Security Dept EGroup Permanent  
 PSubarea 00FT Agencywide ESubgroup 05 H-OT Elig>40hrs/Wk Status Active

Basic Personal Data Payroll Benefits **Time Recording** Addtl. Personal Data

Find by  
 Person  
 Collective search  
 Search Term  
 Free search

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

Direct selection  
 Infotype Quot

Subtypes for infotype "Quota Corrections" (1)  
 Restrictions  
 From 03/03/2009 To

ESG	PSG	AQTyp	Quota text
1	10	30	Sick Leave
1	10	31	Annual Leave/Vacation
1	10	34	Jus. Excess Leave
1	10	35	Compensatory Time
1	10	37	Exchange Time
1	10	38	Military Leave
1	10	39	Holiday Credits
1	10	40	Excess Vacation Acrua
1	10	41	Shared Leave
1	10	42	Personal Holiday - Shift
1	10	43	Settl Leave WSP
1	10	44	Recognition Lv (non-rep)
1	10	45	PH - Shared Lv. Donation
1	10	46	Sick Leave Pool
1	10	47	Uniformed Serv Lv Pool

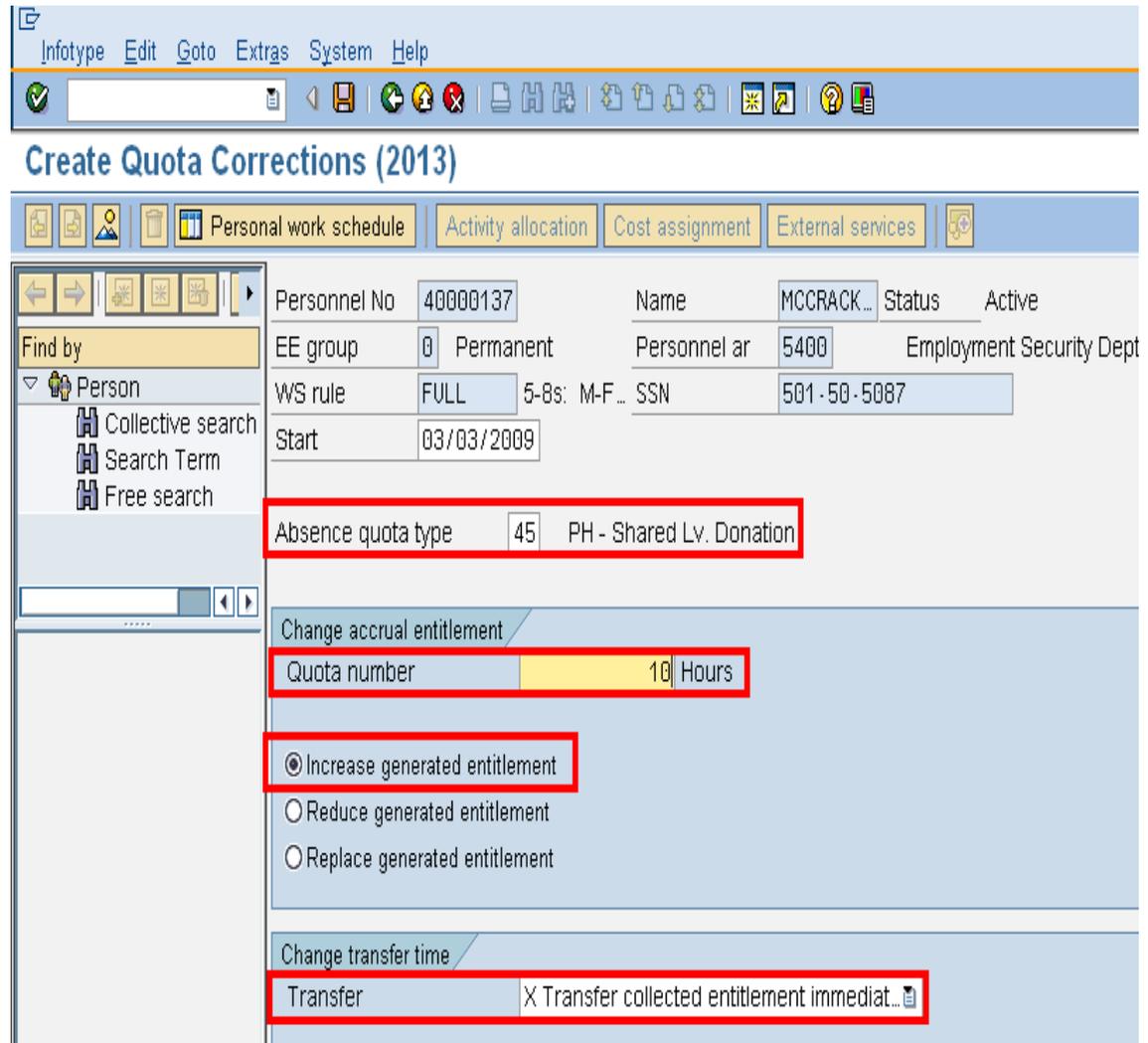
# Step 2. Increase Quota Type 45

## ■ Fields to complete:

- *Quota Number*
  - Total number of hours equal to the employee's shift
- Increase generated entitlement
- Transfer collected entitlement immediately

■ Click  (Enter) to validate

■ Click  (Save) to save



Infotype Edit Goto Extras System Help

Create Quota Corrections (2013)

Personal work schedule Activity allocation Cost assignment External services

Personnel No 40000137 Name MCCRACK... Status Active  
 EE group 0 Permanent Personnel ar 5400 Employment Security Dept  
 WS rule FULL 5-8s: M-F... SSN 501-50-5087  
 Start 03/03/2009

Absence quota type 45 PH - Shared Lv. Donation

Change accrual entitlement

Quota number 10 Hours

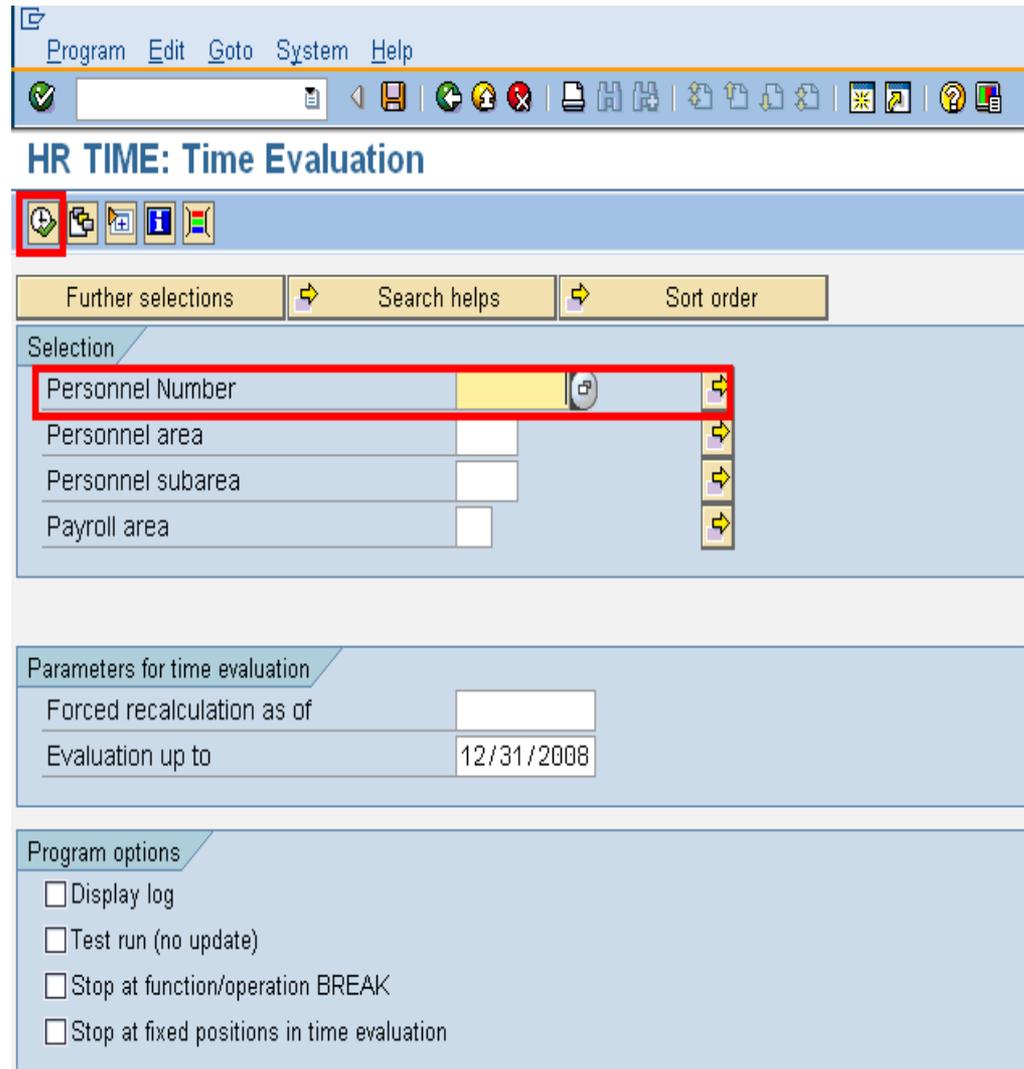
Increase generated entitlement  
 Reduce generated entitlement  
 Replace generated entitlement

Change transfer time

Transfer X Transfer collected entitlement immediat...

# HR Time: Time Evaluation (ZT60)

- Enter the transaction code **/NZT60** in the command field
- Enter the employee's Personnel Number
- Evaluation up to Date – let default to the last day of the month
- Click  (Execute) to execute the process



Program Edit Goto System Help

HR TIME: Time Evaluation

Further selections Search helps Sort order

Selection	
Personnel Number	<input type="text"/> 
Personnel area	<input type="text"/>
Personnel subarea	<input type="text"/>
Payroll area	<input type="text"/>

Parameters for time evaluation

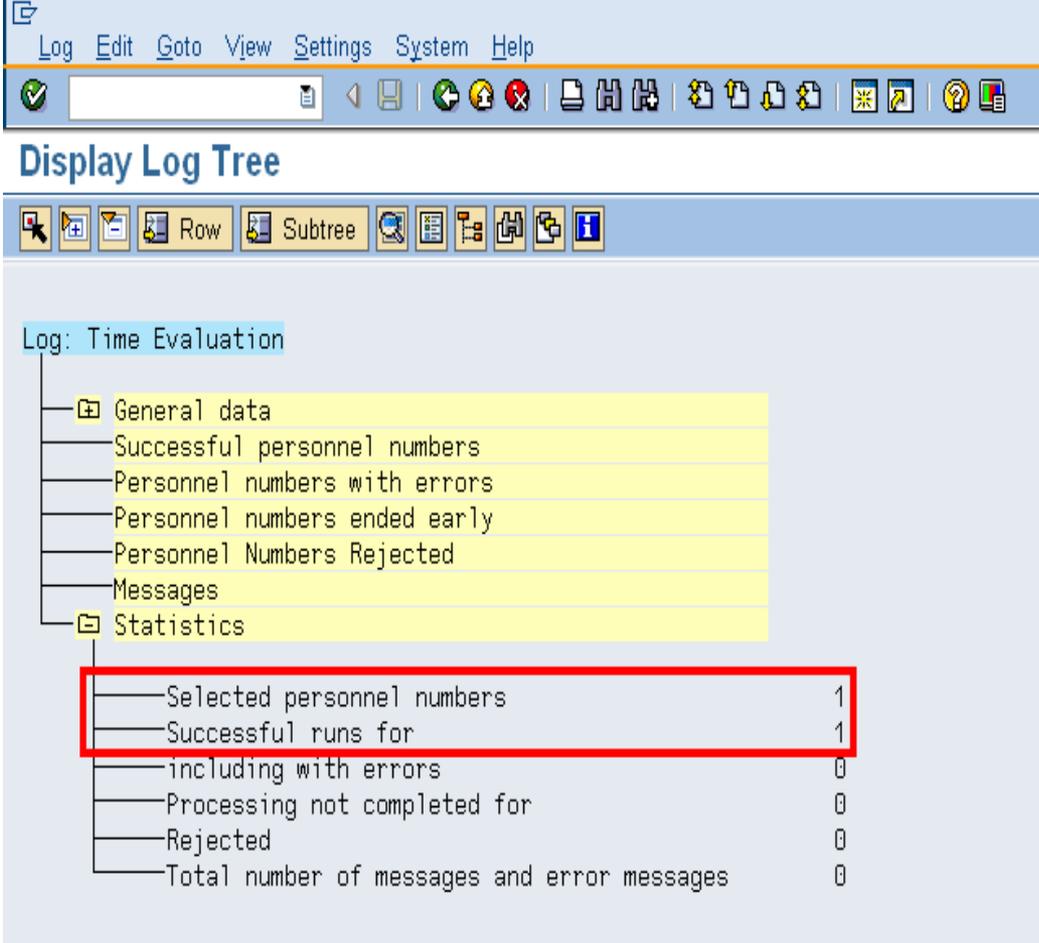
Forced recalculation as of	<input type="text"/>
Evaluation up to	12/31/2008

Program options

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

# HR Time: Time Evaluation (ZT60) cont'd.

- Verify the time transfer was successful
- Click  (Exit) and return to the SAP Easy Access screen



The screenshot shows the SAP Display Log Tree for the transaction 'Log: Time Evaluation'. The log is structured as follows:

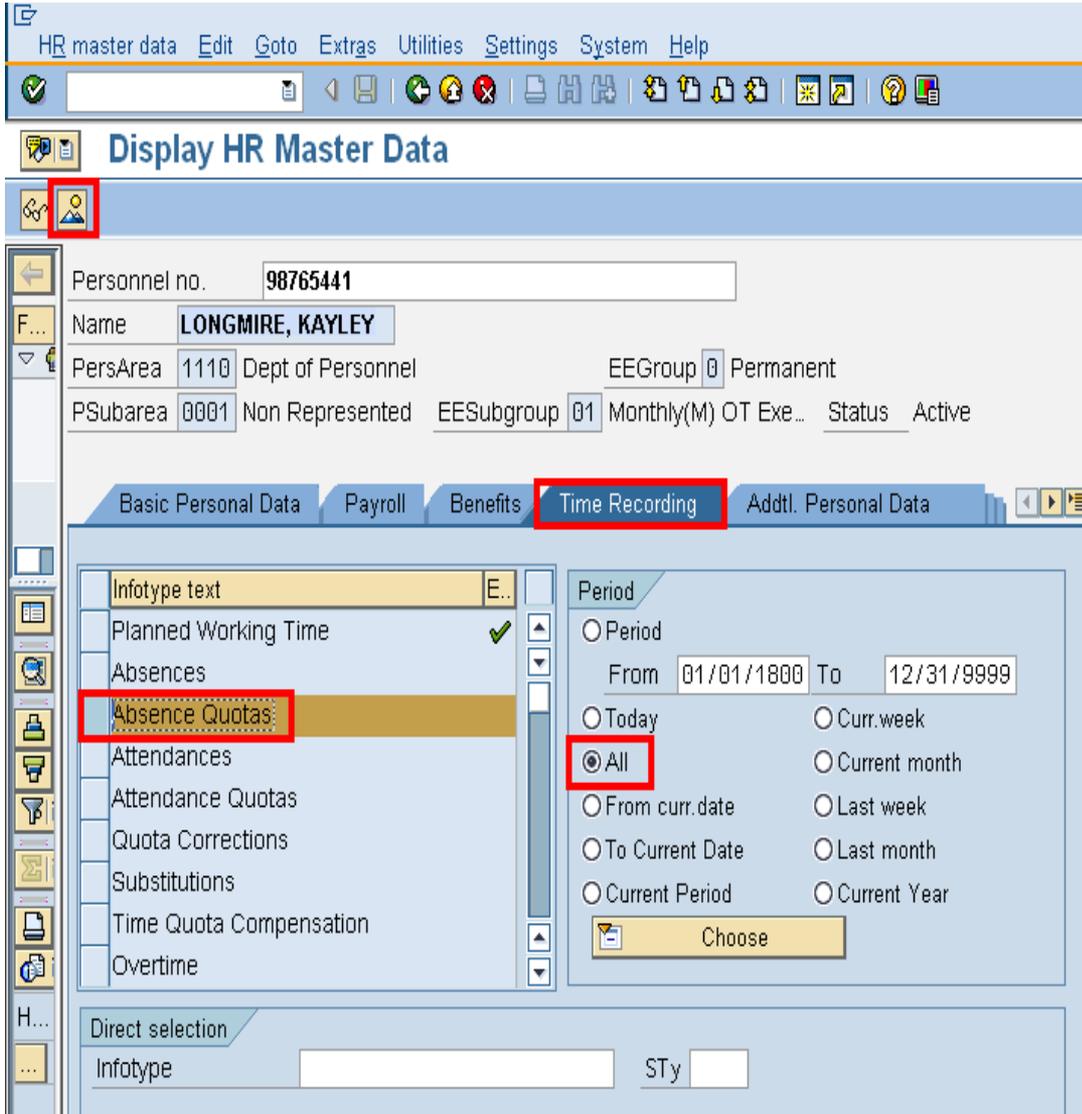
- Log: Time Evaluation
  - General data
    - Successful personnel numbers
    - Personnel numbers with errors
    - Personnel numbers ended early
    - Personnel Numbers Rejected
  - Messages
  - Statistics
 

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

The 'Selected personnel numbers' and 'Successful runs for' rows in the Statistics section are highlighted with a red box.

# Viewing the records

- Use the transaction code **PA20**
- Enter Personnel Number
- Click  (Enter) to validate
- Select the  tab
- Select *Absence Quotas (2006)*
- In the Period section, select the **All** radio button
- Click  (overview)



HR master data Edit Goto Extras Utilities Settings System Help

Display HR Master Data

Personnel no. 98765441

Name LONGMIRE, KAYLEY

PersArea 1110 Dept of Personnel EGroup Permanent

PSubarea 0001 Non Represented ESubgroup 01 Monthly(M) OT Exe... 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 01/01/1800 To 12/31/9999

Today  Curr.week

**All**  Current month

From curr.date  Last week

To Current Date  Last month

Current Period  Current Year

Choose

Direct selection

Infotype STy

# Viewing the records cont'd.

Infotype Edit Goto Extras System Help

Overview Absence Quotas (2006)

Choose

Personnel No. 40000137 Name MCCRACKEN TOBY

PersArea 5400 Employment Security Dept EEGroup 0 Permanent

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

Choose 02/01/2009 To 04/30/2009 STy. 45

Absence Quotas

Start Date	End Date	A...	Quota text	Start ded.	End ded.	Number	Deduction
03/02/2009	03/02/2009	45PH	Shared Lv. Donation	03/02/2009	12/31/9999	10.00000	0.00000

- Date Type 45- **PH Shared Lv Donation** has been increased to match the employees scheduled work hours.

# HRMS Activity



**Exercise:**  
**Convert Personal Holiday into Shared  
Leave Donation**  
**Page 19**

# Troubleshooting a Personal Holiday donation

# Troubleshooting a Personal Holiday donation

Infotype Edit Goto Extras System Help

Overview Absence Quotas (2006)

Choose

Personnel No.  Name

PersArea  Wash Corrections Center EEGroup  Permanent

PSubarea  Institutions EESubgroup  M-OT Elig>40hrs/Awk Status

Choose  To  STy.

Absence Quotas

Start Date	End Date	A...	Quota text	Start ded	End ded.	Number	Deduction	From
12/31/2008	12/31/2008	42	Personal Holiday - Shift	12/31/2008	12/31/2008	1.00000	0.00000	
12/31/2008	12/31/2009	42	Personal Holiday - Shift	01/01/2009	12/31/2009	1.00000	0.00000	
08/29/2008	08/29/2008	42	Personal Holiday - Shift	08/29/2008	12/31/2008	1.00000	0.00000	

- The employee now has a negative number for Personal Holiday-Shift

# Troubleshooting a Personal Holiday donation cont'd.

Infotype Edit Goto Extras System Help

**Display Quota Corrections (2013)**

Personal work schedule | Activity allocation | Cost assignment | External services

Personnel No **40000000** Name **DAVIS** Status **Active**  
 EE group **0** Permanent Personnel ar **3105** Wash Corrections Center  
 WS rule **FULL** 5-8s: M-F... SSN  
 Start **12/31/2008** Chg. **12/24/2008** KELLYW

Absence quota type **42** Personal Holiday - Shift

Change accrual entitlement  
 Quota number **1.00000** Days

Increase generated entitlement  
 Reduce generated entitlement  
 Replace generated entitlement

Change transfer time  
 Transfer **X Transfer collected entitlement immediat...**

**Transfer method should have been Do NOT change Transfer time**

- The incorrect Change Transfer time was selected and caused the negative quota correction.
- Should be **Do not Change Transfer Time**

# Troubleshooting a Personal Holiday donation cont'd.

Infotype Edit Goto Extras System Help

Change Quota Corrections (2013)

Personal work schedule | Activity allocation | Cost assignment | External services

Personnel No **40000000** Name **DAVS** Status Active

EE group **0** Permanent Personnel ar **3105** Wash Corrections Center

WS rule **FULL** 5-8s: M-F... SSN **111-11-11111**

Start **12/31/2008** Chg. **12/24/2008** KELLYW

Absence quota type **42** Personal Holiday - Shift

Change accrual entitlement

Quota number **1.00000** Days

Increase generated entitlement

Reduce generated entitlement

Replace generated entitlement

Change transfer time

Transfer **Do not change transfer time**

## ■ To fix the error:

- Create a quota correction with the correct transfer method
- Run the *Time Evaluation*(ZT60) to reduce the PH-Shift to zero

# Troubleshooting a Personal Holiday donation cont'd.

Infotype Edit Goto Extras System Help

Overview Absence Quotas (2006)

Choose

Personnel No. 400000000 Name DAVIS, JANE

PersArea 3105 Wash Corrections Center EEGroup 0 Permanent

PSubarea 00TA Institutions EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Choose 01/01/1800 To 12/31/9999 STy. 42

Absence Quotas

Start Date	End Date	A...	Quota text	Start ded	End ded.	Number	Deduction
12/31/2008	12/31/2009	42	Personal Holiday - Shift	01/01/2009	12/31/2009	1.00000	0.00000
08/29/2008	08/29/2008	42	Personal Holiday - Shift	08/29/2008	12/31/2008	0.00000	0.00000

- After the *Time Evaluation (ZT60)* is ran, verify the correction
- The Personal Holiday-Shift is now reduced to 0 (zero)

# Summary of Donating a Personal Holiday

- We have identified how to verify an employee has a personal holiday to donate
- Identified the steps necessary to convert a personal holiday to be donated as shared leave
- Explained how to verify quota records created



# Review Questions

**1. What are the two different ways to verify an employees' quota balance for a Personal Holiday?**

---

**2. True or False?**

**Agencies will need to create a quota correction for every employee to give their personal holiday each year?**

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---

---

# Return Unused Shared Leave

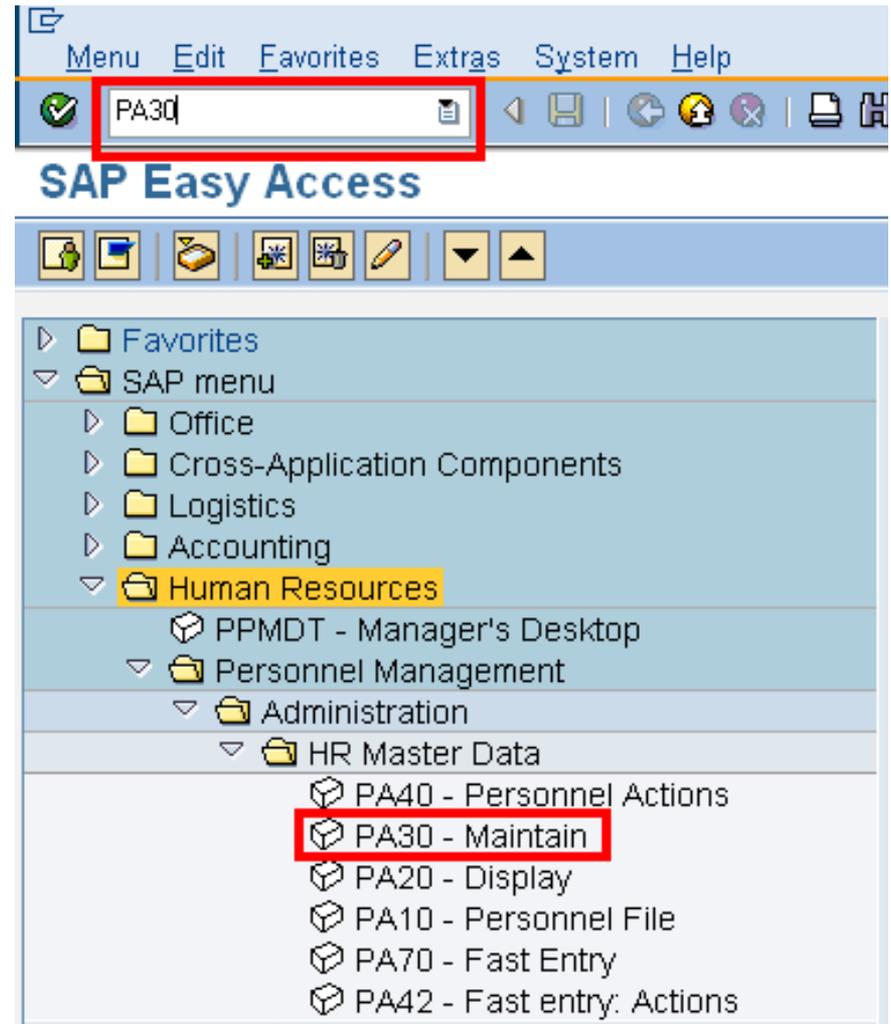
# Return Unused Shared Leave

- When returning donated leave, agencies must specify what type of leave was donated so that the hours can be returned to the appropriate quota type in the donor's records
- The process of returning Shared Leave is very similar to initially donating Shared Leave
- Use *Absence Donation Administration* (0613) to return the leave to the donor or the leave pool.



# Return Unused Shared Leave to the donor

- To return unused shared leave, follow the menu path:  
Human Resources → Personnel Management → Administration → HR Master Data → Maintain
- You can also use the transaction code **PA30** (Maintain HR Master data)



# Return Unused Shared Leave to the donor cont'd.

- Enter *Personnel no.* of the recipient
- Click the **Time Recording** tab
- Enter the from date
- Click the gray box to the left **Absence Donation Administration US**
- Click  (Create) to create and continue

The screenshot shows the 'Maintain HR Master Data' window. The 'Personnel no.' field contains '40000196'. The 'Time Recording' tab is selected. A dialog box titled 'Subtypes for infotype "Absence C' is open, showing a list of subtypes. The 'Absence' row is highlighted, and the '0001 Donation/Return' subtype is selected. The 'From' date in the 'Period' section is '05/05/2011'.

Personnel no. 40000196

Name SPELJAK LULZIM

PersArea 5400 Employment Security Dept EEGroup 0 Permanent

PSubarea 00FT Agencywide EESubgroup 01 Monthly(M) OT Exe... Status Active

Basic Personal Data Payroll Benefits **Time Recording** Addtl. Personal Data

Infotype text s... Period

Employee Remuneration Info  Period

Availability From 05/05/2011 To

Time Transfer Specifications  Today  Curr.week

Time Events  All  Current month

Leave Entitlement Compensation from curr.date  Last week

Workers' Comp from Current Date  Last month

Absence Current Period  Current Year

**Absence** Choose

Direct select Infotype

STyp Name

0001 Donation/Return

0002 Withdrawal

# Return Unused Shared Leave to the donor

## cont'd.

### ■ Fields to complete:

- *Abs. quota type*
- *Number/Unit*
- *Personnel no.*
- *Target Abs. quota*
- ⚠ *Check 'Amount Related'*
- *Select Employee Radio button*

■ Click  (Enter) to validate

■ Click  (Save) to save

Infotype Edit Goto Extras System Help

Create Absence Donation Administration US(0613)

Personnel No 40000196 Name SPELJAK LULZIM  
 EE group 0 Permanent Personnel ar 5400 Employment Security Dept  
 EE subgroup 01 Monthly(M) OT Ex... SSN 500-10-1147 Status Active  
 Start 05/05/2011

Absence Donation Administration US  
 Abs.quota type 41 Shared Leave ( 118.0900...  
 Number/Unit 98.00 Hours

Home Pool  
 Home Pool ID

Foreign Pool  
 Foreign Pool ID

Employee  Amount Related  
 Personnel no. 40000235 PHILLIPS MICHAEL  
 Target Abs. quota 30 Sick Leave

External Recipient  
 Ext. Person  
 Absence Quota Type

Original Recipient

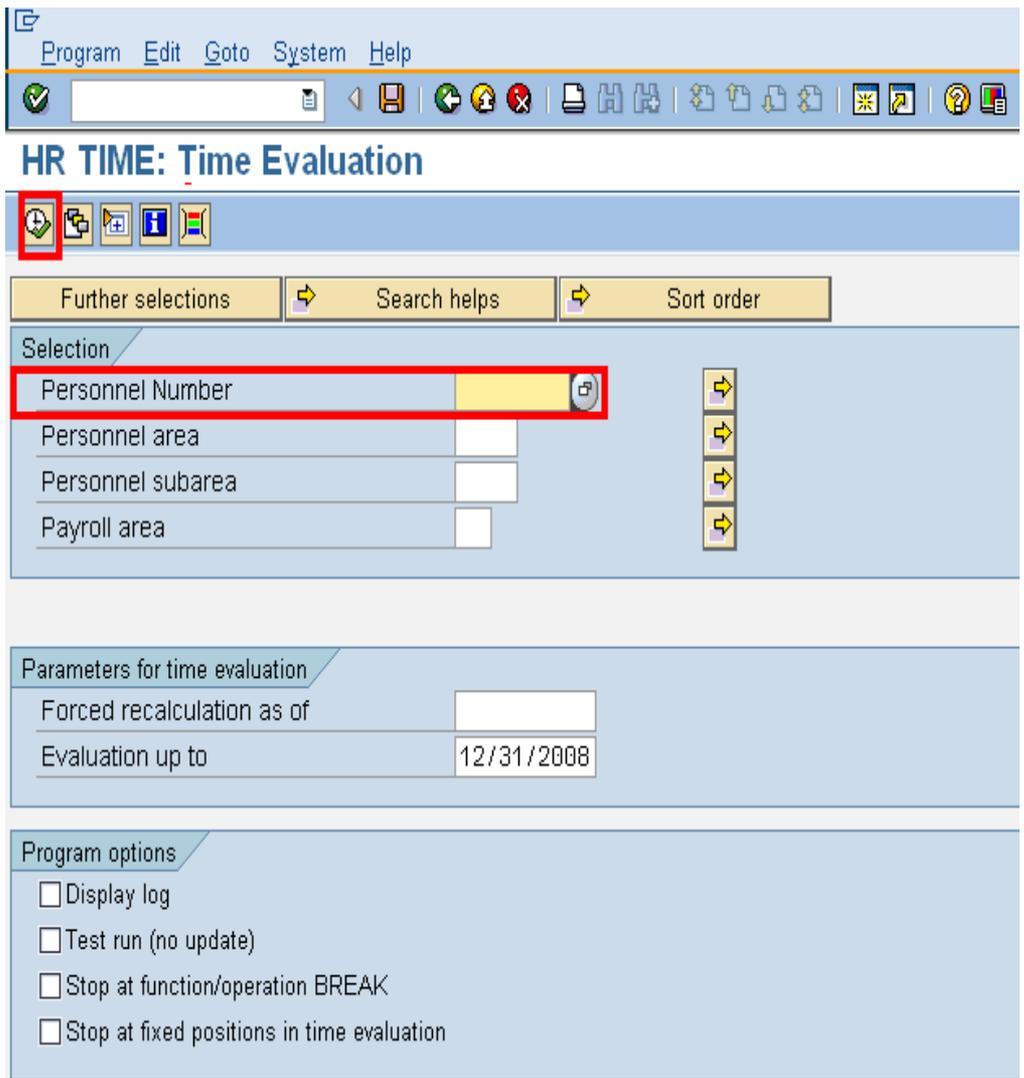
Original Donor and type of leave donated by donor

# Return Unused Shared Leave to the donor cont'd.

■ Enter the transaction code **/NZT60**

■ Fields to complete:  
– *Donors Personnel Number*

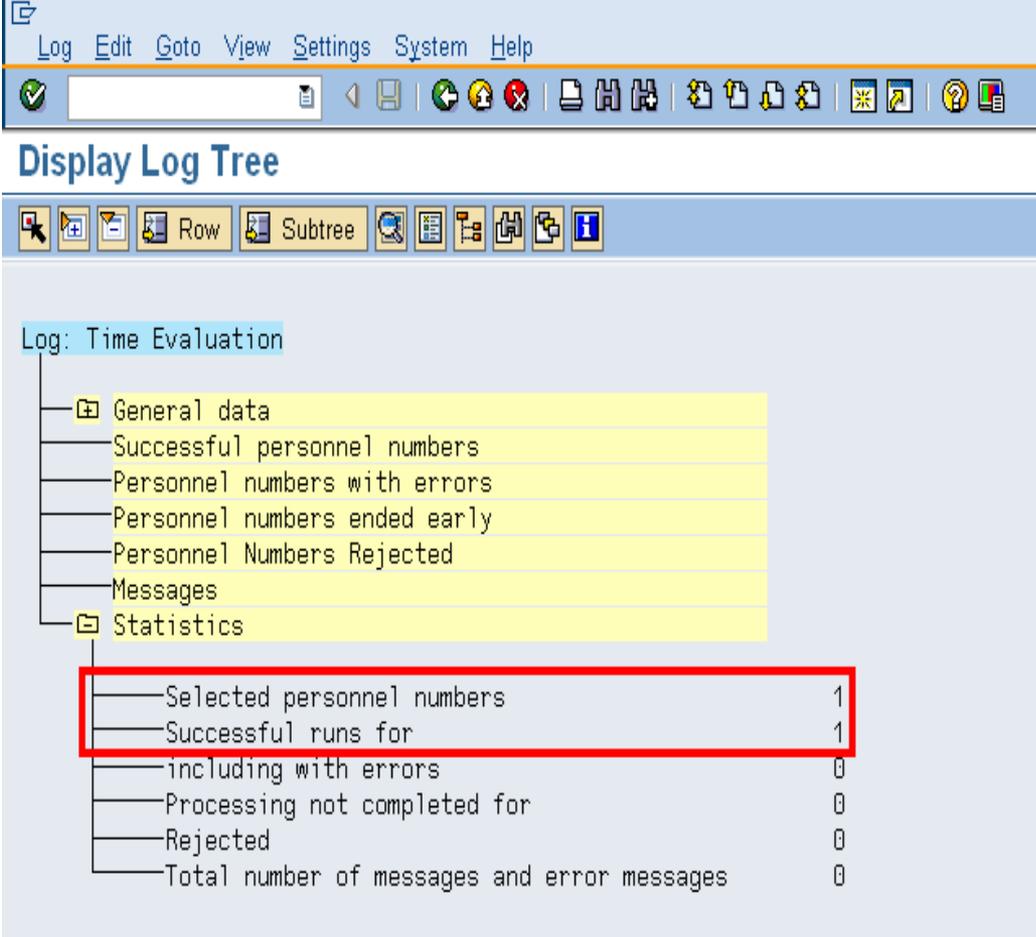
■ Click  (Execute) to execute the process



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 bar is a toolbar with various icons. The main title is 'HR TIME: Time Evaluation'. Below the title is another toolbar with icons, including a green checkmark icon which is highlighted with a red box. Below the toolbar are three buttons: 'Further selections', 'Search helps', and 'Sort order'. The main area is divided into sections: 'Selection', 'Parameters for time evaluation', and 'Program options'. In the 'Selection' section, there is a table with four rows: 'Personnel Number', 'Personnel area', 'Personnel subarea', and 'Payroll area'. The 'Personnel Number' row is highlighted with a red box, and its input field contains a lock icon. To the right of the table are four arrow buttons. In the 'Parameters for time evaluation' section, there are two input fields: 'Forced recalculation as of' and 'Evaluation up to', with the date '12/31/2008' entered in the second field. In the 'Program options' section, there are four checkboxes: 'Display log', 'Test run (no update)', 'Stop at function/operation BREAK', and 'Stop at fixed positions in time evaluation', all of which are currently unchecked.

# Return Unused Shared Leave to the donor<sup>100</sup> cont'd.

- Verify the time transfer was successful
  
- Click  (Exit) and return to the SAP Easy Access screen



The screenshot shows the SAP 'Display Log Tree' interface. The main content area displays a log for 'Time Evaluation'. The 'General data' and 'Statistics' sections are expanded. The 'Statistics' section contains a table with the following data:

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

The first two rows of the table are highlighted with a red border.

# Return Unused Shared Leave to the donor

cont'd.

- Enter the transaction code **/NPA20** into the command field
- Enter the **Donor's** personnel number
- Click the **Time Recording** tab
- Enter the from date
- Select *Absence Quotas (2006)*
- Click  (*Overview*) to display all

The screenshot shows the 'Display HR Master Data' window for personnel number 40000235, Michael Phillips. The 'Time Recording' tab is active. In the list of options, 'Absence Quotas' is highlighted. The 'Period' dropdown menu is open, showing 'From 05/10/2011' and 'To' as empty. Other options include 'Today', 'All', 'From curr. date', 'To Current Date', 'Current Period', 'Curr. week', 'Current month', 'Last week', and 'Current Year'. A 'Choose' button is visible below the dropdown. At the bottom, the 'Direct selection' section shows 'Absence Quotas' selected in the 'Infotype' field.

# Return Unused Shared Leave to the donor cont'd.

Choose

Personnel No. 40000235 Name PHILLIPS MICHAEL

PersArea 1110 Dept of Personnel EEGroup B Civil Service Exempt

PSubarea 0003 Exempt EESubgroup 01 Monthly(M) OT Exe... Status Active

Choose 05/05/2011 To 05/05/2011 STy.

Start Date	End Date	A...	Quota text	Start ded	End ded.	Number	Deduction
05/05/2011	05/05/2011	30	Sick Leave	05/05/2011	12/31/9999	20.75000	0.00000

- Verify the start date, quota type and the amount of hours returned.

- **Note:** If returning **Sick Leave** from a prior year, you will need to add a **Text Note** to the **donor's Quota Correction (2013)** to include the sick leave in the **donors** sick leave balance, yet **not** impact the year to date sick leave taken. **Refer to the User Procedure Shared Leave Returning Donation.**

# HRMS Activity



**Exercise:**  
**Return Unused leave to the Donor**  
**Page 24**

# Review Questions

1. Which infotype is used to return unused shared leave back to the donor?

## 2. True or False?

When returning unused leave back to the donor you will select the quota type **Shared Leave** as the **Target Abs. quota** for the donor on the Absence Donation Administration(613)?

# Section 3:

## Excess Vacation Accrual (EVA) and Justified Excess Vacation (JEV)

# EVA and JEV Overview

- Upon completion of this section you will be able to:
  - Define EVA and JEV
  - Describe how EVA is generated within HRMS
  - Identify what to do if a change needs to be made to the EVA accrual
  - Create the eligibility period for JEV on an employee's record

# Excess Vacation Accrual (EVA)

- Annual leave hours in excess of 240 hours.
- EVA is generated on Day 5 of payroll processing by the Department of Enterprise Services
- Quota type **40 (EVA)** is created with a start and end date
  - The end date is the day before the employee's anniversary date
- Leave requests deduct from quota type **40 (EVA)** then **31 (Annual Leave)**

**Note:**

Effective 1/1/2013-Agencies who have implemented the ESS Leave Application tool, employees will no longer accrue a separate EVA accrual. See Enterprise Services Communication 1/1/2013 (Move ESS Leave agencies to new EVA process)

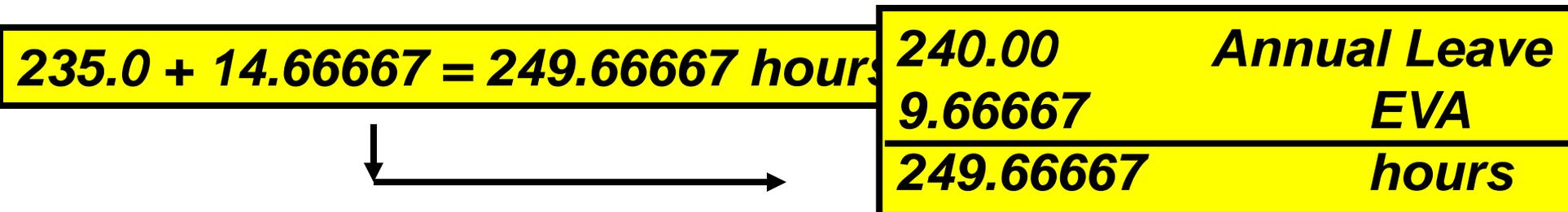


# Excess Vacation Accrual (EVA)

## ■ EVA Overview

An employee has a quota type 31 (Annual Leave) balance of 235.0 as of the 15<sup>th</sup> of the month

- The accrual process completes on the 16<sup>th</sup> and creates quota type 31 (Annual Leave) for 14.66667 hours. The employee now has 249.66667 of annual leave
- On DAY 5 of payroll HRMS automatically creates two quota corrections. One to reduce quota type 31 (Annual Leave), and one to create or increase quota type 41 (EVA)



# Excess Vacation Accrual (EVA)

- Using the *Attendance System Change Report* (ZHR\_RPTPY084) report to verify quota balances.

Attendance System Change Report

State of Washington - HRMS  
Attendance System Change Report

Report ID: ZHR\_RPTTM084  
User: KELLYW  
Run Date: 12/17/2008  
Period: 10/16/2008 thru 10/31/2008

Personnel	Quota Type	Quota Type Text	Leave Accr	Beginning	Earned	Receiv...	Taken/Re...	Paid/Repor	Adjustm...	Donated	Return...	Ending Bal
1110	30	Sick Leave	10/31/2008	307.10000	8.00000	0.00000	0.00000	0.00000	0.00000	0.00000	0.00000	315.10000
1110	31	Annual Leave/Vacation	10/31/2008	240.00000	14.66667	0.00000	0.00000	0.00000	14.66667	0.00000	0.00000	240.00000
1110	40	Excess Vacation Accrual	10/31/2008	1.33340	0.00000	0.00000	0.00000	0.00000	14.66667	0.00000	0.00000	16.00007
1110	42	Personal Holiday - Shift	10/31/2008	1.00000	0.00000	0.00000	0.00000	0.00000	0.00000	0.00000	0.00000	1.00000

**Note:**

EVA hours are not accrued hours. HRMS automatically moves quota into EVA

# Excess Vacation Accrual (EVA)

## ■ Scenario 1

The EVA accrual should have never been created.

- Employees annual leave balance is 240 on the 15<sup>th</sup>. They turn in a leave slip for sick leave for the 13<sup>th</sup> of the same month for 12 hours.
- On the 16<sup>th</sup>, the automated EVA process has completed for the payroll cycle
- On the 17<sup>th</sup> the employee changes their leave slip from sick leave to annual leave.

**Solution:** Use the *Quota Corrections (2013)*, select the EVA that was created for the pay period, select the **delete**. Then run the Time Evaluation (ZT60) to reestablish the employee's leave balances.

# Excess Vacation Accrual (EVA)

## ■ Scenario 2

Returning unused EVA back to the original donor after the donor's anniversary has passed

An employee's anniversary date is January 18.

- The employee donated 30 hours of EVA to the recipient as shared leave
- It is March 1st, the **recipient** is no longer in need of shared leave and must return all unused leave.

**Solution:** Use the *Absence Donation Administration (0613)* to return the EVA back to the **donor**. The **start** date would be the actual day of the return.



**Note:**

*Agencies are responsible for following state rules and considering them along with their Collective Bargaining Agreements and other agency policies.*

# Excess Vacation Accrual (EVA)

## Scenario 3- Adjustments to EVA balances

- Employee's Annual leave accrual rate is: 14.66667

The automated EVA process has completed for the payroll cycle

- Employee's current **Annual** leave (31) balance is: 240
- Employee's current **EVA** (40) balance is: 14.66667 (hours over 240)
- Employee turns in a late leave slip dated for the 10<sup>th</sup> of the month for 10 hours of Annual leave.
- Adjustments are needed to both of the quota corrections that were completed via the EVA process to correct the employees Annual leave and EVA balances.

### Solution:

- Run the **Attendance System Change Report (ZHR\_RPTTM084)** identify the EVA adjustment column and subtract the hours on the leave slip.  
For example:  $14.66667 - 10 = 4.66667$  hours.
- Access the current *Quota Corrections (2013)* created for both the *Annual leave and EVA*, select the *Pencil (change)* enter the adjusted hours **4.66667** into the hours and save.

# Justified Excess Vacation JEV

# Justified Excess Vacation (JEV)

- JEV is a proactive process that is started by the agency through a director's approved "statement of necessity".
  - **WAC 357-31-215**
- Effective dates for the JEV period are created using *Date Specifications* (0041).
  - The JEV period is not monitored in the system; it's the responsibility of the agency to monitor and zero out the JEV balance when that time comes.
- HRMS will automatically create the quota type 34(JEV) balance.
  - Use Absence Quotas (2006) to view the record.

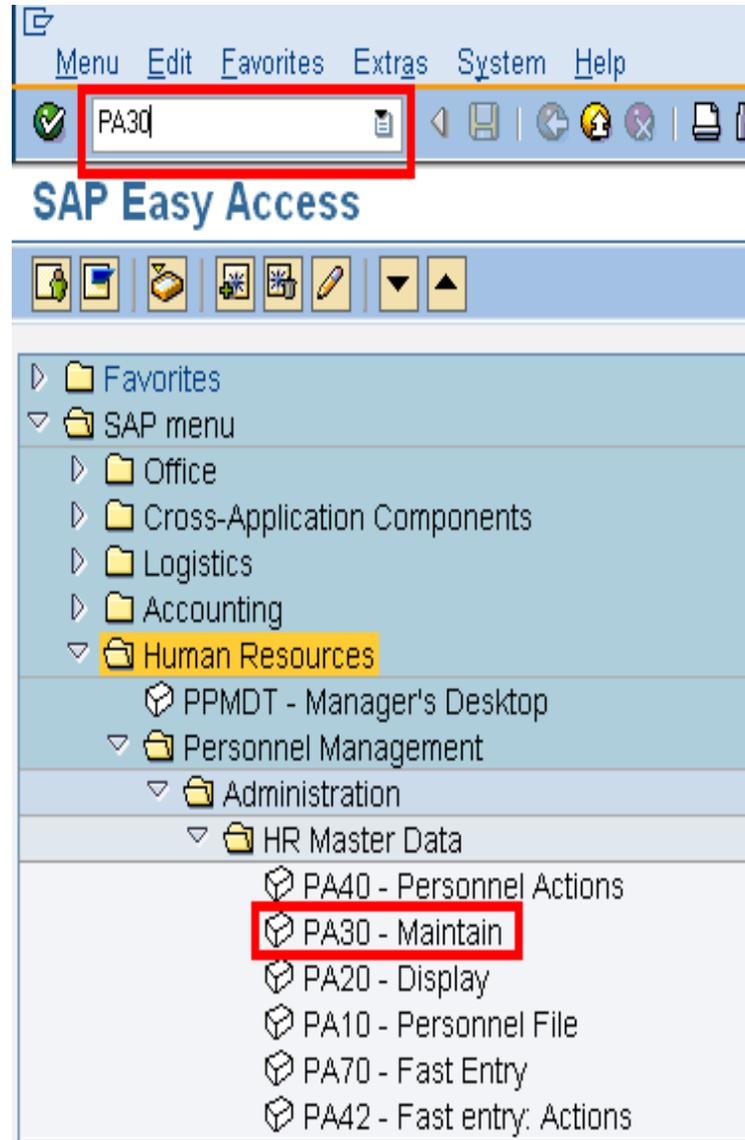


## Note:

**JEV can not be processed retroactively**

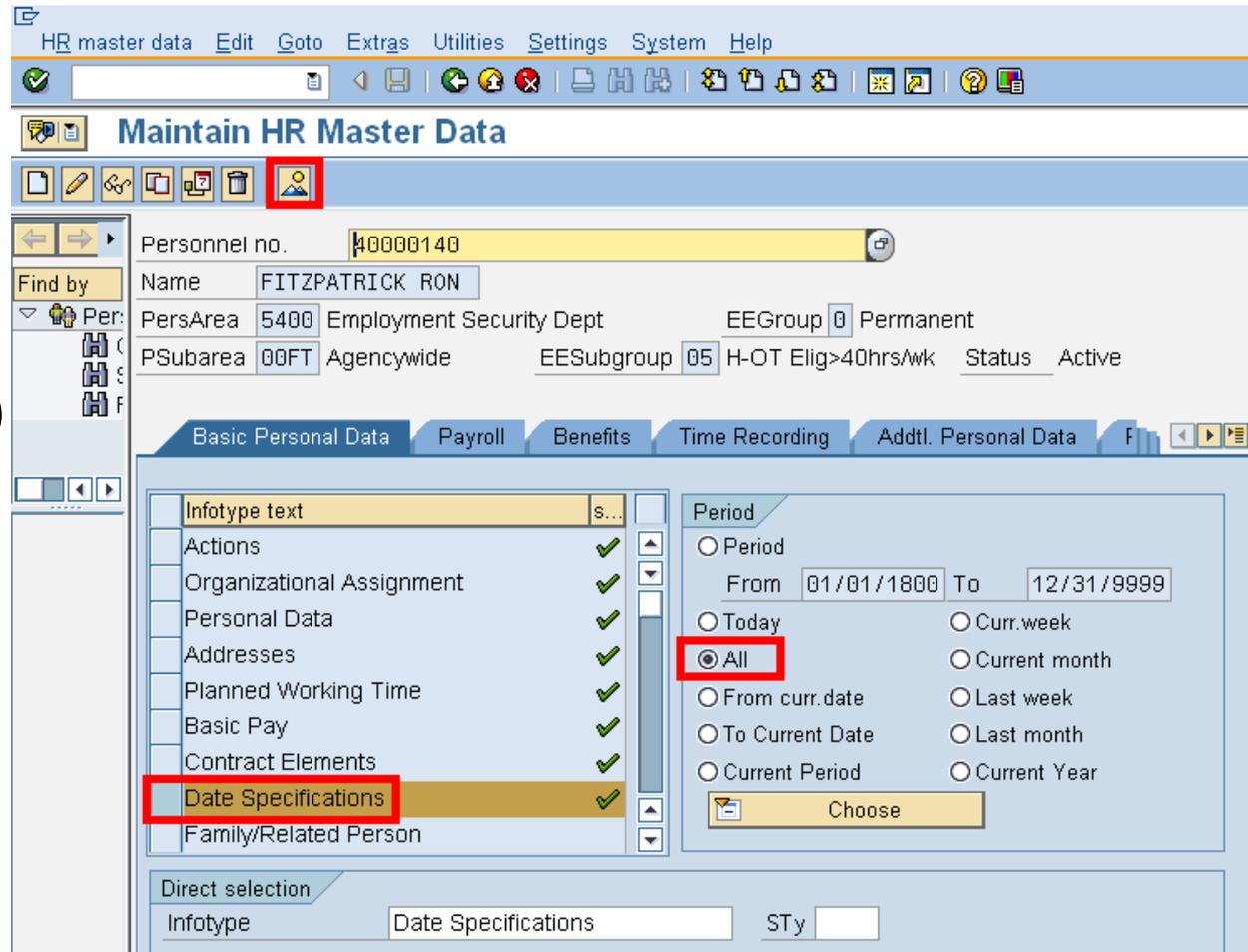
# Creating the JEV Period

- To display HR Master Data, follow menu path:  
Human Resources →  
Personnel Management →  
Administration → HR  
Master Data → Maintain
- You can also use the  
transaction code **PA30**  
(Maintain HR Master data)



# Creating the JEV Period cont'd.

- Enter the *Personnel no.*
- Click  (Enter) to validate
- Select *Date Specifications (0041)*
- Select **All** in the *Period* section
- Click  (Overview) to display all records associated with the infotype



The screenshot shows the 'Maintain HR Master Data' application window. The 'Personnel no.' field contains '40000140'. The 'Name' field contains 'FITZPATRICK RON'. The 'PersArea' is '5400', 'Employment Security Dept', 'EEGroup' is '0', and 'Permanent' is selected. The 'PSubarea' is '00FT', 'Agencywide', 'EESubgroup' is '05', 'H-OT Elig>40hrs/wk', and 'Status' is 'Active'.

The 'Date Specifications' infotype is selected in the list. The 'Period' section shows the 'All' radio button selected. The 'From' date is '01/01/1800' and the 'To' date is '12/31/9999'. The 'Choose' button is visible.

Direct selection  
 Infotype: Date Specifications STy:

# Creating the JEV Period cont'd.

- Click the gray box to the left of the current record (12/31/9999)
- Click  (Copy) to copy and continue

Infotype Edit Goto Extras System Help

List Date Specifications (0041)

Personnel No. 40000140 Name FITZPATRICK RON

PersArea 5400 Employment Security Dept EEGroup 0 Permanent

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

Choose 01/01/1800 to 12/31/9999

	From	To	D..	Date	D..	Date	D..	Date	D..	Date
	09/01/2007	12/31/9999	01	05/14/1993	02	09/01/2007	03	10/26/1992	04	09/01/2001
	06/01/2006	08/31/2007	01	05/14/1993	02	09/01/2000	03	10/26/1992	04	09/01/2001

# Creating the JEV Period cont'd.



Enter the start date of the record

## ■ Select Date Type

- 16 (JEV Begin Date)
- 17 (JEV End Date)

## ■ Click (Enter) to validate

## ■ You will receive a warning message “Record valid from XXXX to XXXXXX delimited at end

## ■ Click (Save) to save

Infotype Edit Goto Extras System Help

### Copy Date Specifications (0041)

Personnel No. 40000140 Name FITZPATRICK RON

PersArea 5400 Employment Security Dept EEGroup 0 Permanent

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

Start 1/16/2011 to 12/31/9999

Date Specifications			
Date type	Date	Date type	Date
01 Anniversary Date	05/14/1993	02 Appointment Date	09/01/2007
03 Original Hire Date	10/26/1992	04 Prior PID	09/01/2001
05 Seniority Date	05/14/1993	07 Unbroken Svc. Date	05/14/1993
18 Prsnl HolidayElgblty	06/16/2006		
16	1/16/2011		
17	9/1/2011		

# HRMS Activity



**Exercise:  
Create JEV  
Page 27**

# Review Questions

1. **What end date does HRMS create for EVA?**
2. **Which infotype is used to enter the JEV start and end dates?**
3. **True or False?  
JEV dates can be entered into the system retroactively?**

# **Section 4: Manual Adjustments**

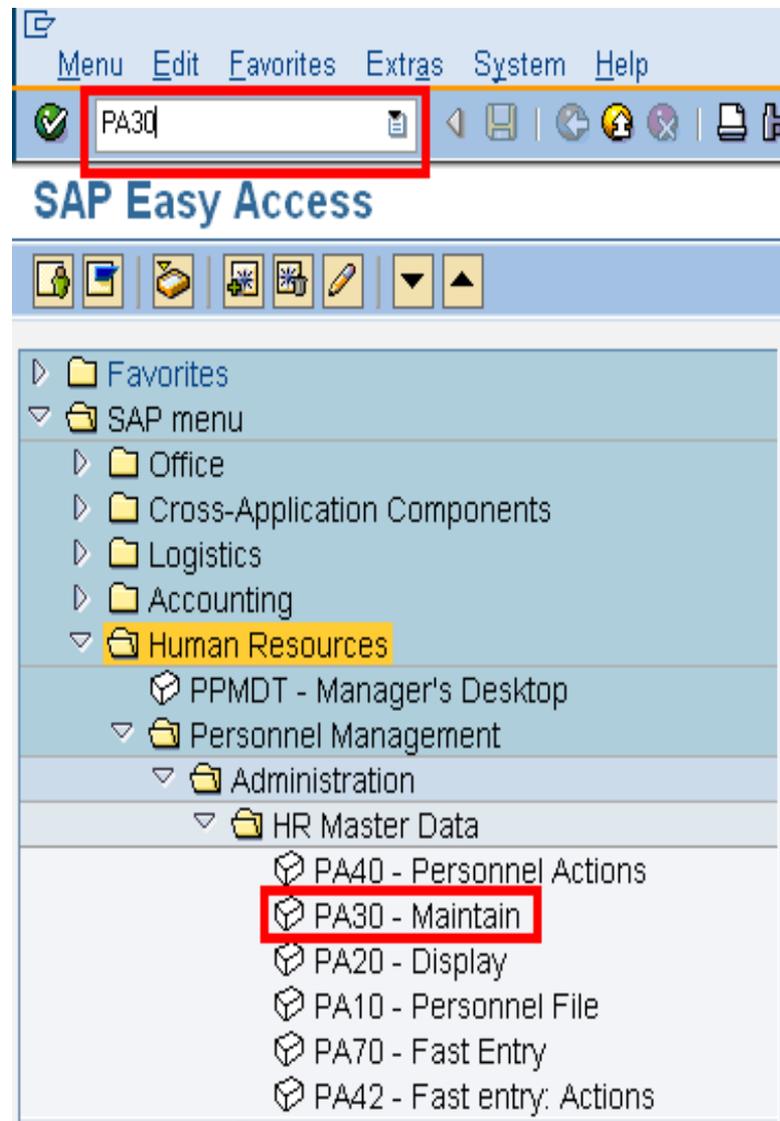
# Manual Adjustments Overview

- Upon completion of this section, you will be able to:
  - Create a quota correction to change the availability date of system generated accruals
  - Create a quota correction to replace the system generated accrual rate
  - Remove accrued quota from employees who leave state service
  - Define how to correct negative quota corrections
  - Additional Scenarios for quota corrections

# Change the Availability Date of System Generated Accruals

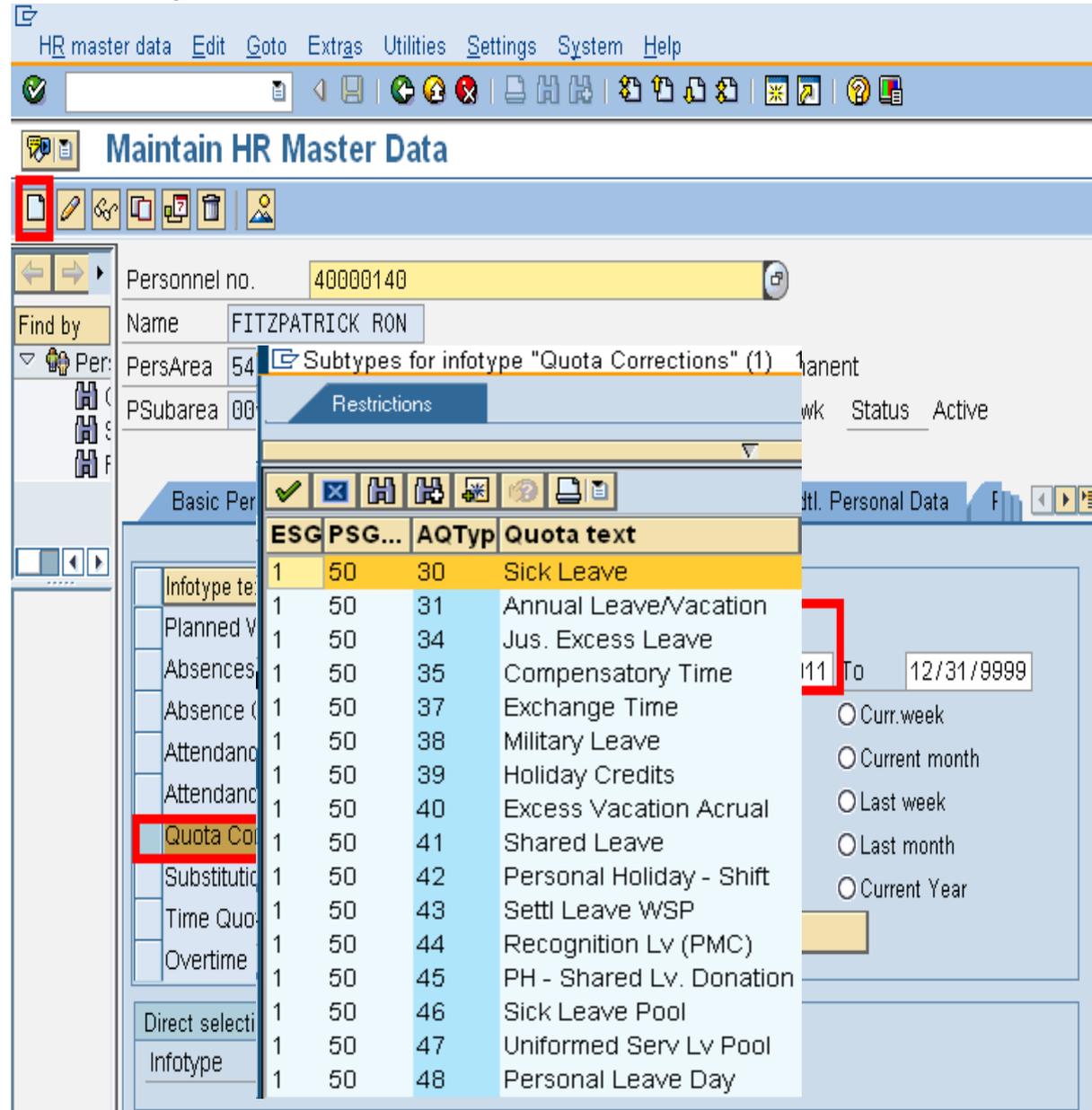
# Changing Availability Date

- To create a Quota Correction, follow menu path:  
Human Resources → Personnel Management → Administration → HR Master Data → Maintain
- You can also access the Quota Correction infotype by using the transaction code **PA30** (Maintain HR Master data)



# Changing Availability Date

- Enter the *Personnel no.*
- Click  (Enter) to validate
- Select the  tab
- Enter the Start date
- Click the gray box to the left of 
- Click  (Create) to create a new record



The screenshot shows the 'Maintain HR Master Data' application. The 'Personnel no.' field is set to 40000140, and the name is FITZPATRICK RON. The 'PersArea' is 54 and 'PSubarea' is 00. The 'Time Recording' tab is selected. A list of quota corrections is displayed with columns for 'ESG', 'PSG...', 'AQTyp', and 'Quota text'. The 'Quota Corrections' button is highlighted in gray. A red box highlights the 'Enter' icon in the toolbar. A red box highlights the '11' in the 'From' date field, which is set to 12/31/9999. The 'Current Year' radio button is selected in the date selection options.

ESG	PSG...	AQTyp	Quota text
1	50	30	Sick Leave
1	50	31	Annual Leave/Vacation
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 Acrua
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

# Changing Availability Date cont'd.

■ Select Quota Type

■ Fields to complete:

- Quota Number
- Increase generated entitlement
- Transfer collected entitlement immediately

■ Click  (Enter) to validate

■ Click  (Save) to save

Infotype Edit Goto Extras System Help

Create Quota Corrections (2013)

Personal work schedule Activity allocation Cost assignment External services

Personnel No 40000140 Name FITZPAT... Status Active  
 EE group 0 Permanent Personnel ar 5400 Employment Securi  
 WS rule FULL 5-8s: M-F... SSN 501-50-5090  
 Start 02/20/2011

Absence quota type  $\beta$ 1 Annual Leave/Vacation

Change accrual entitlement

Quota number 10.66667 Hours

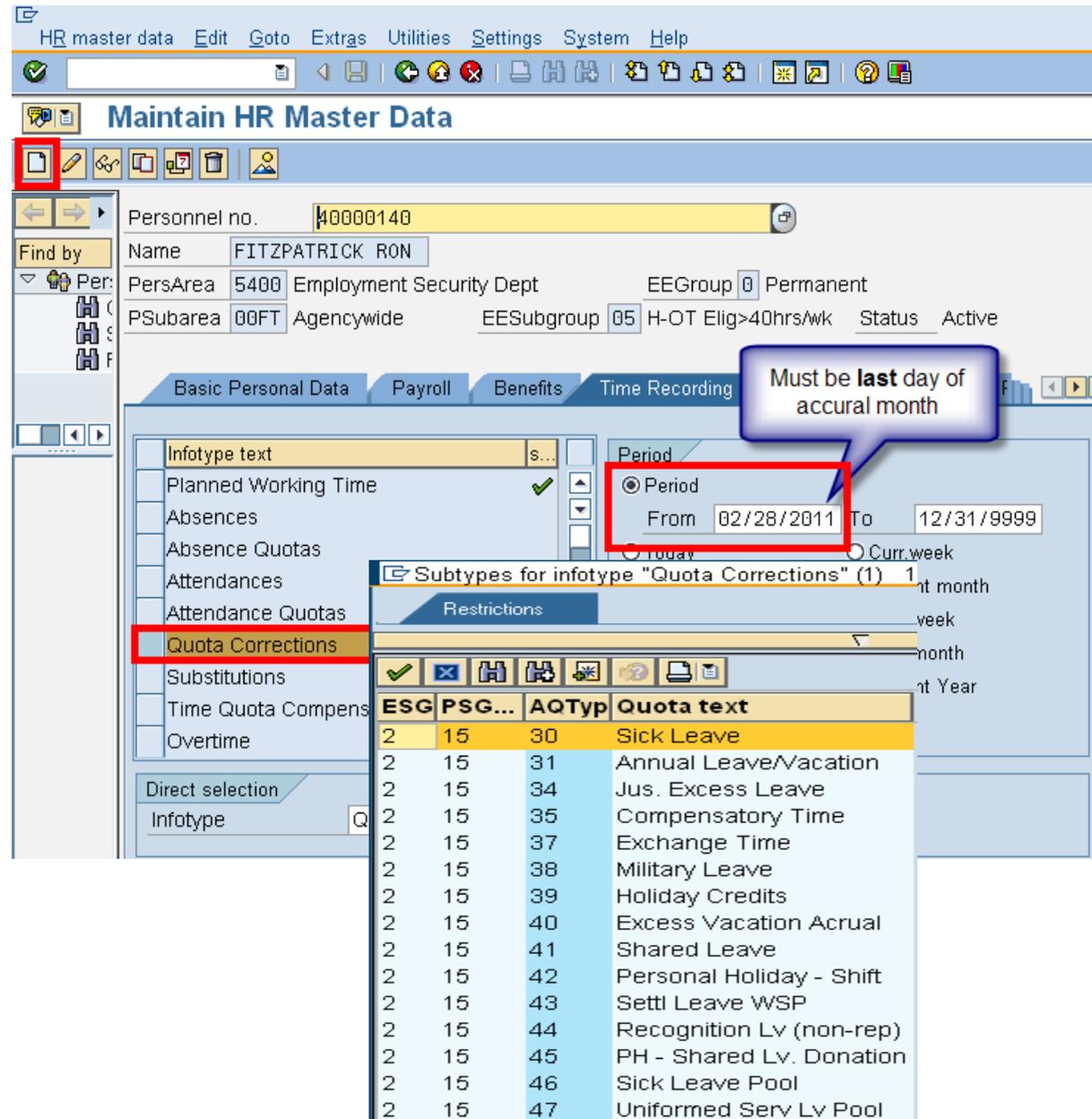
Increase generated entitlement  
 Reduce generated entitlement  
 Replace generated entitlement

Change transfer time

Transfer X Transfer collected entitlement immediat...

# Changing Availability Date cont'd.

- Enter the transaction code **PA30**
- Enter the *Personnel no.*
- Click  (Enter) to validate
- Select the **Time Recording** tab
- Enter the from date
- Click the gray box to the left of **Quota Corrections**
- Click  (Create) to create a new record
- Select Quota Type



The screenshot shows the 'Maintain HR Master Data' window for Personnel no. 40000140 (FITZPATRICK RON). The 'Time Recording' tab is selected. A callout bubble points to the 'From' date field (02/28/2011) with the text 'Must be last day of accur month'. The 'Quota Corrections' section is highlighted, and a list of quota types is displayed below.

ESG	PSG...	AQTyp	Quota text
2	15	30	Sick Leave
2	15	31	Annual Leave/Vacation
2	15	34	Jus. Excess Leave
2	15	35	Compensatory Time
2	15	37	Exchange Time
2	15	38	Military Leave
2	15	39	Holiday Credits
2	15	40	Excess Vacation Acrua
2	15	41	Shared Leave
2	15	42	Personal Holiday - Shift
2	15	43	Settl Leave WSP
2	15	44	Recognition Lv (non-rep)
2	15	45	PH - Shared Lv. Donation
2	15	46	Sick Leave Pool
2	15	47	Uniformed Serv Lv Pool

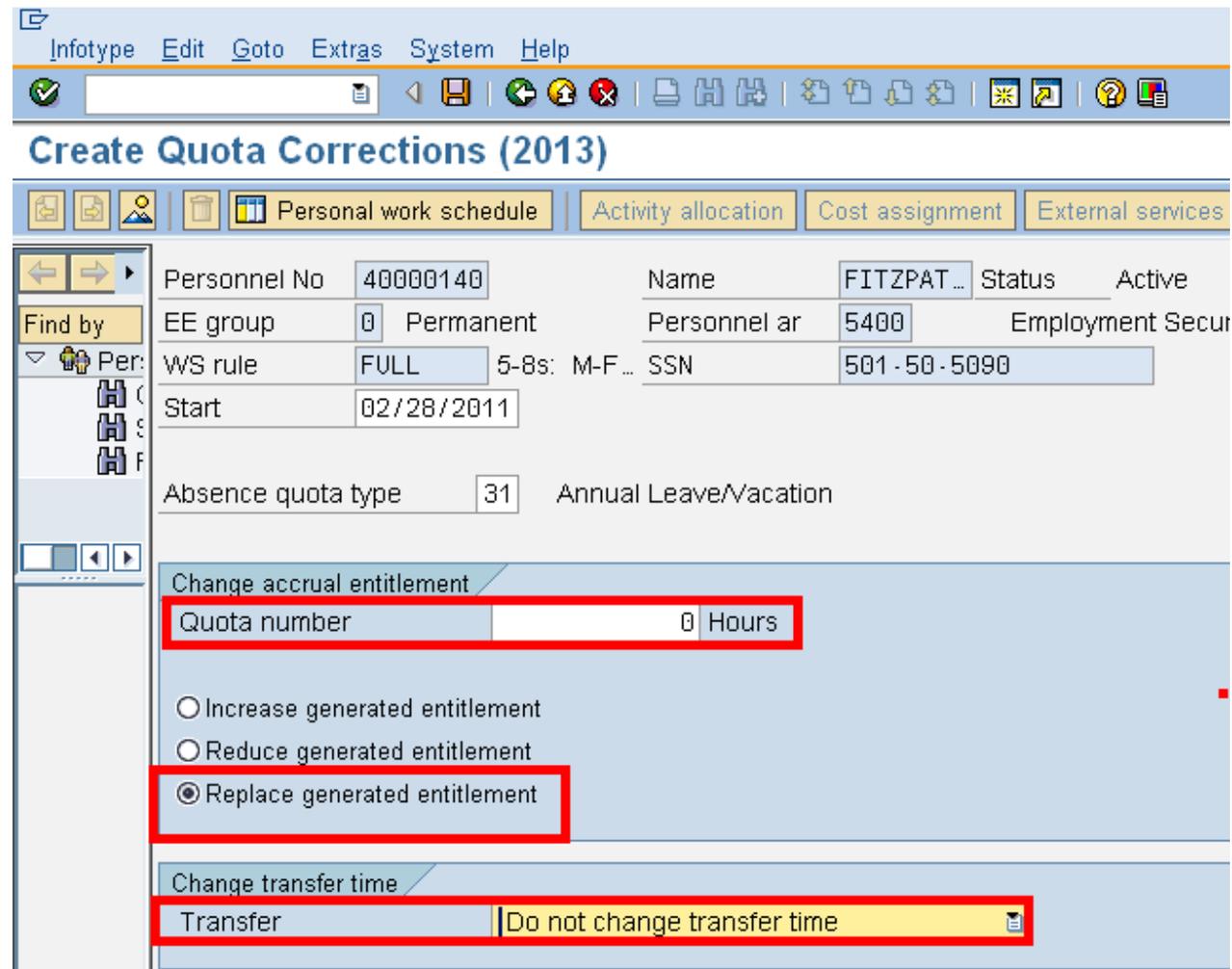
# Changing Availability Date cont'd.

## ■ Fields to complete:

- Quota number
  - Enter a 0 (zero)
- Select **Replace generated entitlement**
- Verify that **Do not change transfer time** is selected

■ Click  (Enter) to validate

■ Click  (Save) to save



Infotype Edit Goto Extras System Help

**Create Quota Corrections (2013)**

Personal work schedule Activity allocation Cost assignment External services

Personnel No	40000140	Name	FITZPAT...	Status	Active
EE group	0 Permanent	Personnel ar	5400	Employment Secur	
WS rule	FULL 5-8s: M-F...	SSN	501-50-5090		
Start	02/28/2011				

Absence quota type 31 Annual Leave/Vacation

Change accrual entitlement

Quota number 0 Hours

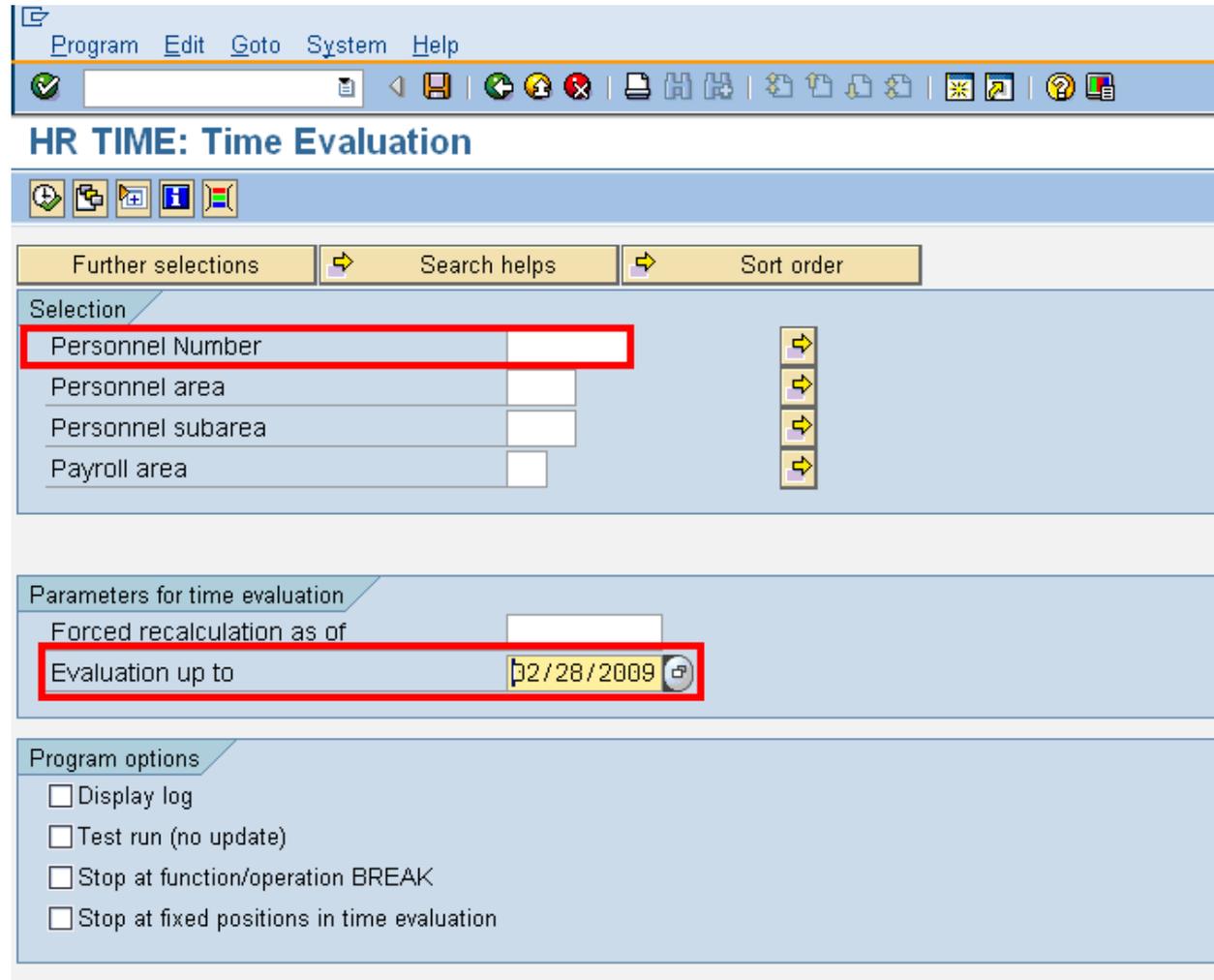
Increase generated entitlement  
 Reduce generated entitlement  
 **Replace generated entitlement**

Change transfer time

Transfer Do not change transfer time

# Quota Correction- Changing Availability Date cont'd.

- Enter **/NZT60** in the command field to access the *Time Evaluation*
- Enter the Personnel Number
- Click  (Execute) to generate report



Program Edit Goto System Help

**HR TIME: Time Evaluation**

Further selections Search helps Sort order

Selection

Personnel Number		→
Personnel area		→
Personnel subarea		→
Payroll area		→

Parameters for time evaluation

Forced recalculation as of

Evaluation up to 02/28/2009

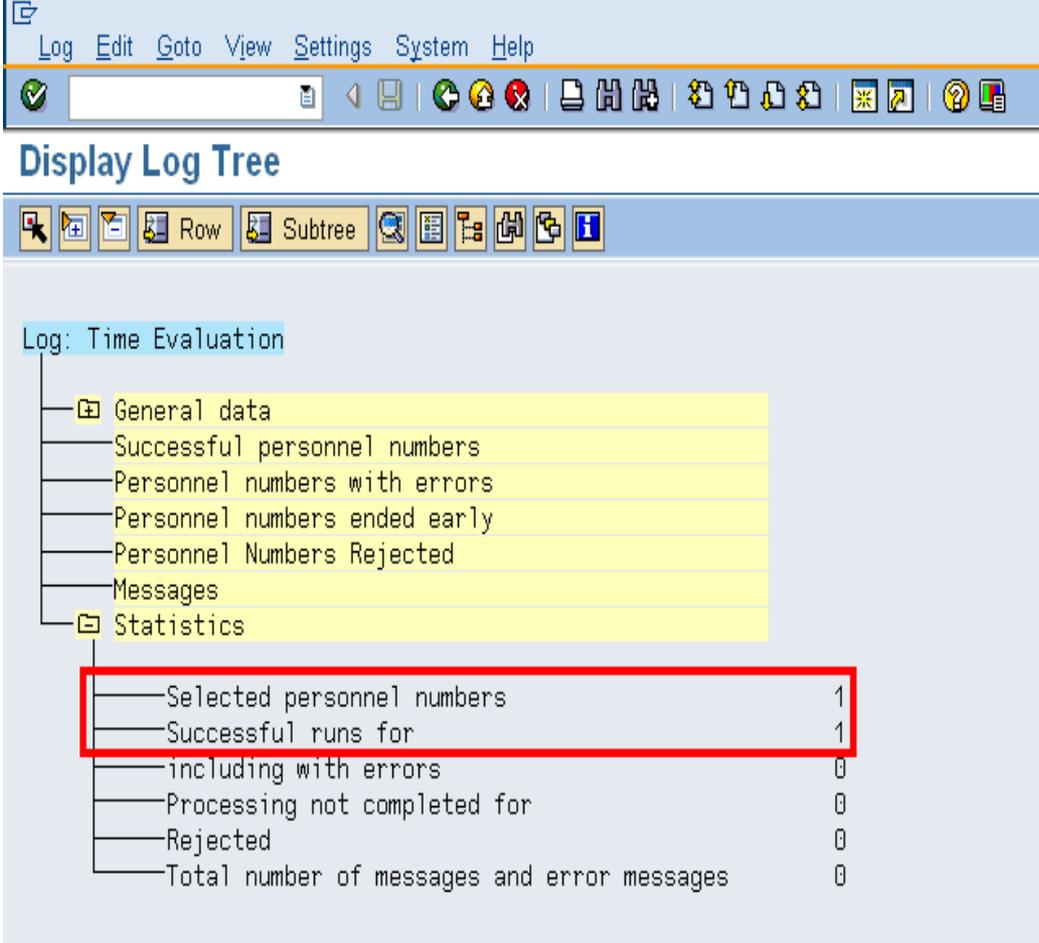
Program options

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

# Quota Correction- Changing Availability

## Date cont'd.

- Verify the time transfer was successful
- Click  (Exit) and return to the SAP Easy Access screen



The screenshot shows the SAP 'Display Log Tree' interface. The main window displays the log for 'Time Evaluation'. The 'Statistics' section is expanded, showing the following data:

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

The 'Selected personnel numbers' and 'Successful runs for' rows are highlighted with a red box, indicating a successful transfer of one personnel number.

# HRMS Activity

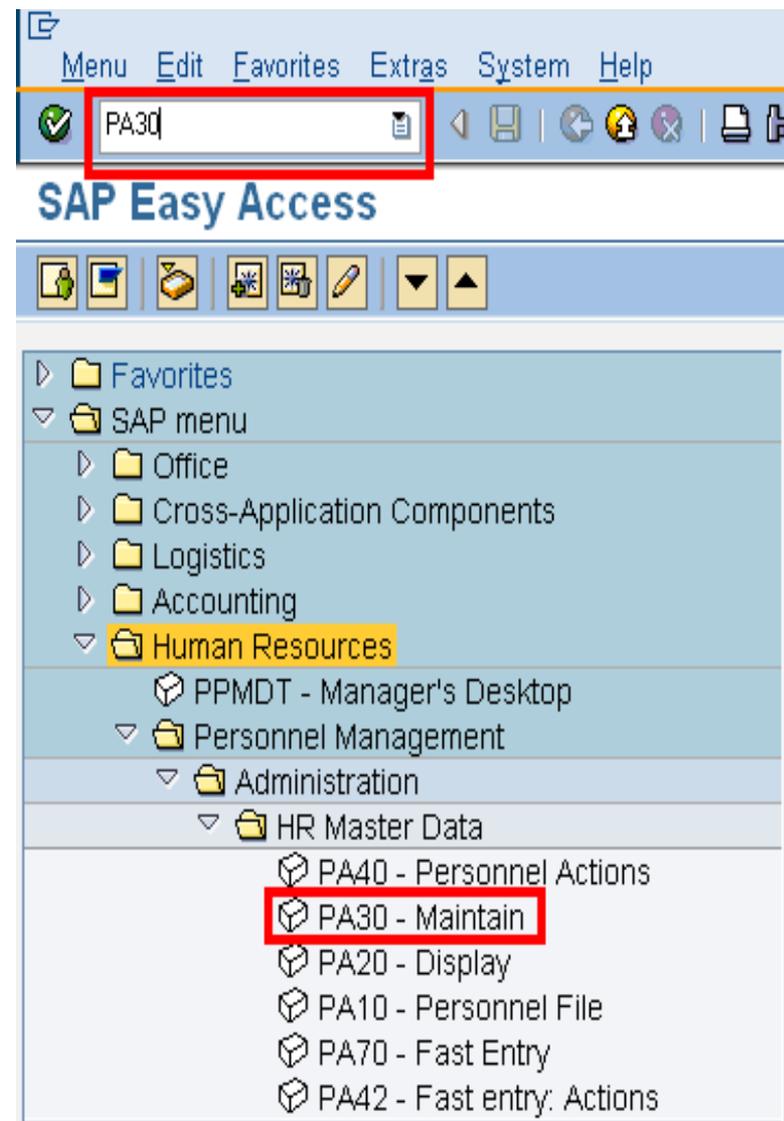


**Exercise:**  
Change the availability date  
**Page 32**

# Replacing the System Generated Accrual

# Option 1: Replacing the System Generated Accrual

- To create a Quota Correction, follow menu path:  
Human Resources → Personnel Management → Administration → HR Master Data → Maintain
- You can also access the Quota Correction infotype by using the transaction code **PA30** (Maintain HR Master data)



# Option 1: Replacing the System Generated Accrual cont'd.

- Enter the *Personnel no.*
- Click  (Enter) to validate
- Select the  tab
- Enter the Start date
- Click the gray box to the left of 
- Click  (Create) to create a new record
- Select the Quota Type

The screenshot shows the 'Maintain HR Master Data' application window. The personnel number is 40000223, and the name is CERWINSKI IRENE. The 'Restrictions' tab is active, displaying a table of quota corrections for infotype 'Quota Corrections' (1).

ESG	PSG...	AQTyp	Quota text
2	15	30	Sick Leave
2	15	31	Annual Leave/Vacation
2	15	34	Jus. Excess Leave
2	15	35	Compensatory Time
2	15	37	Exchange Time
2	15	38	Military Leave
2	15	39	Holiday Credits
2	15	40	Excess Vacation Acrua
2	15	41	Shared Leave
2	15	42	Personal Holiday - Shift
2	15	43	Settl Leave WSP
2	15	44	Recognition Lv (PMC)
2	15	44	Recognition Lv (PMC)
2	15	45	PH - Shared Lv. Donation
2	15	46	Sick Leave Pool
2	15	47	Uniformed Serv Lv Pool

# Option 1: Replacing the System Generated Accrual cont'd.

- Fields to complete:
  - Start
  - Quota Number
  - Replace generated entitlement
  - DO not change transfer time

- Click  (Enter) to validate
- Click  (Save) to save

Infotype Edit Goto Extras System Help

**Create Quota Corrections (2013)**

Personal work schedule Activity allocation Cost assignment External services

Personnel No 40000223 Name CERWINS... Status Active  
 EE group 0 Permanent Personnel ar 5400 Employment Security Dept  
 WS rule FULL 5-8s: M-F... SSN 500-10-1174  
 Start 10/31/2008  
 Absence quota type 31 Annual Leave/Vacation

Change accrual entitlement

Quota number 12.00000

Increase generated entitlement  
 Reduce generated entitlement  
 Replace generated entitlement

Change transfer time

Transfer Do not change transfer time

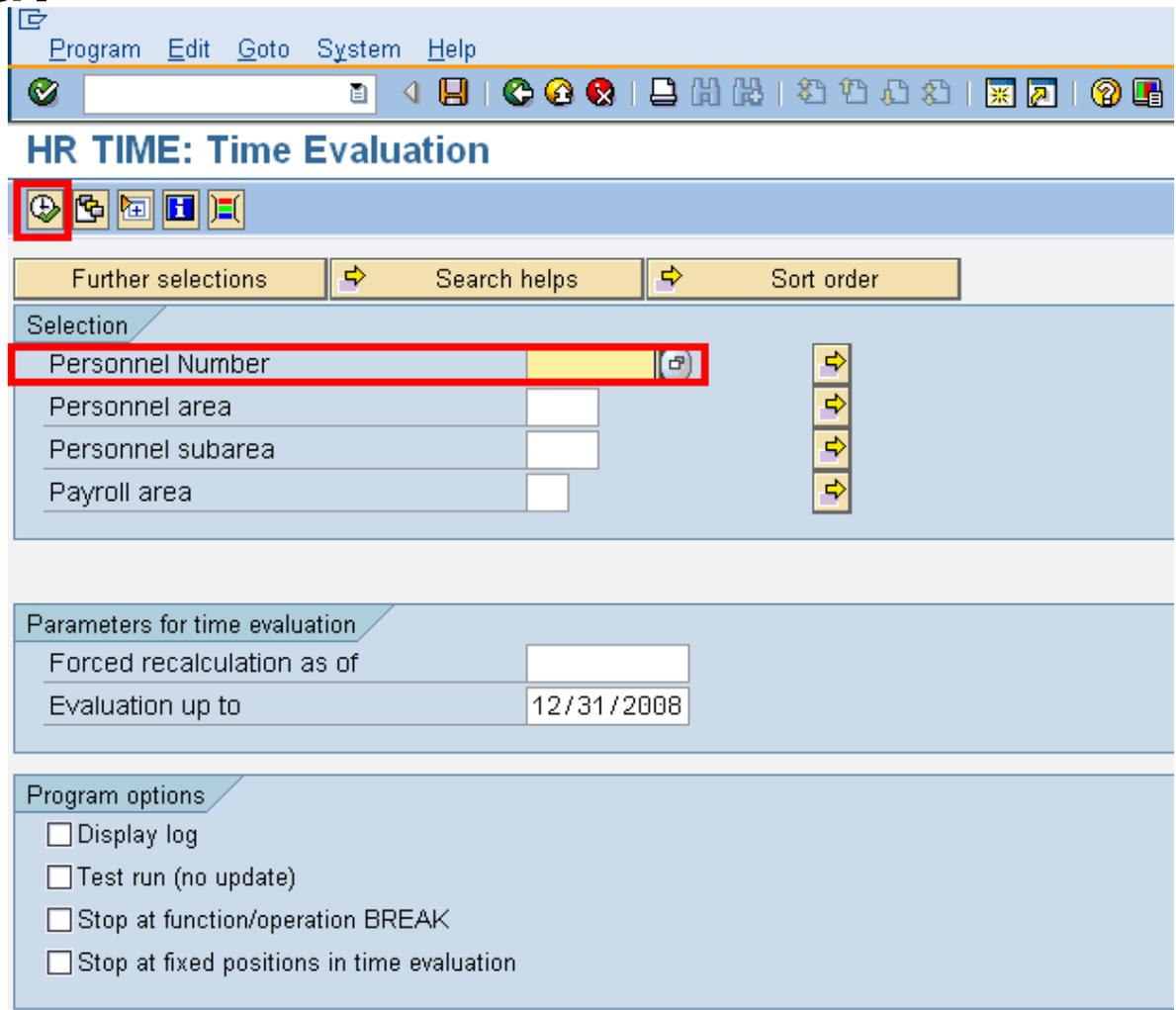
# Option 1: Replacing the System Generated

## Accrual cont'd.

- Enter **/NZT60** in the command field to access the *Time Evaluation*

- Enter the Personnel Number

- Click  (Execute) to generate report

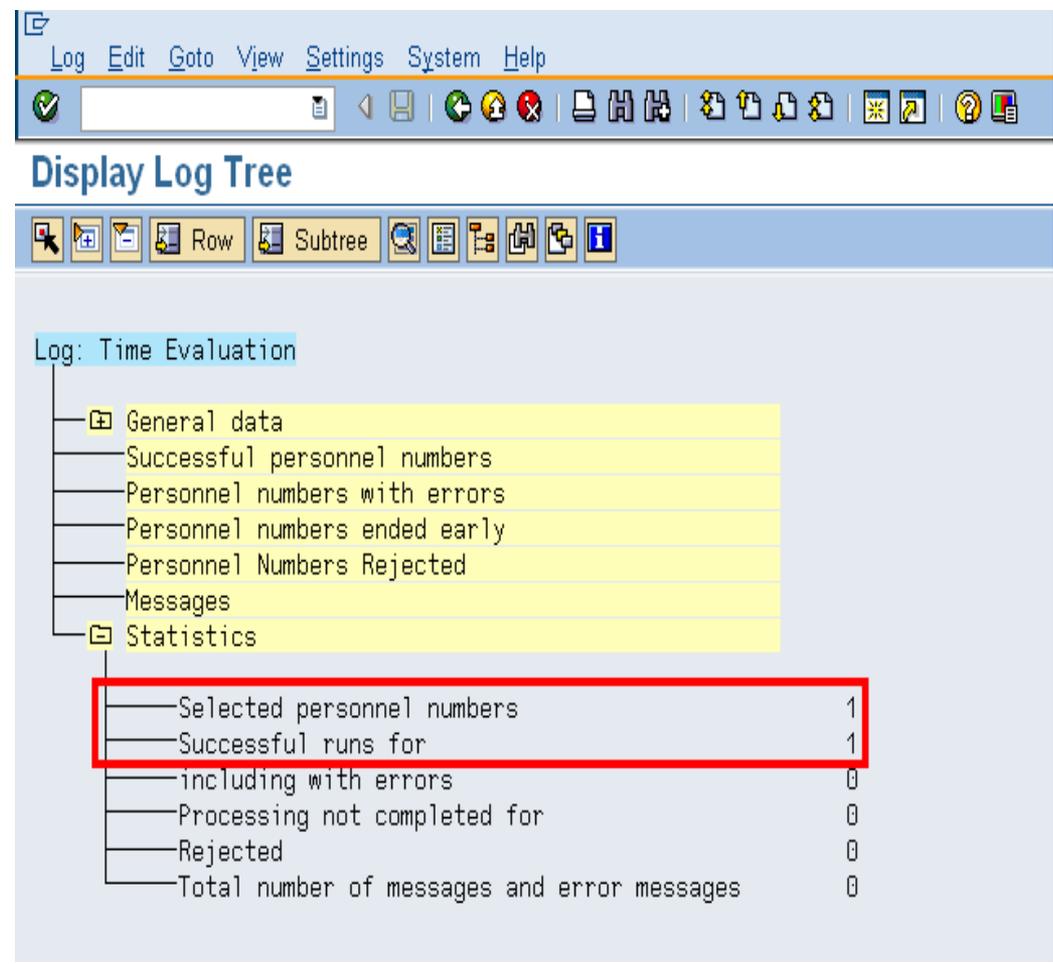


The screenshot shows the 'HR TIME: Time Evaluation' application window. At the top, there is a menu bar with 'Program', 'Edit', 'Goto', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area is titled 'HR TIME: Time Evaluation' and contains several sections:

- Selection:** A table with columns for 'Personnel Number', 'Personnel area', 'Personnel subarea', and 'Payroll area'. The 'Personnel Number' field is highlighted with a red box. To the right of the table are four vertical arrow buttons.
- Parameters for time evaluation:** Two input fields: 'Forced recalculation as of' and 'Evaluation up to' (containing the date '12/31/2008').
- Program options:** A list of checkboxes: 'Display log', 'Test run (no update)', 'Stop at function/operation BREAK', and 'Stop at fixed positions in time evaluation'.

# Option 1: Replacing the System Generated Accrual cont'd.

- Verify the time transfer was successful
  
- Click  (Exit) and return to the SAP Easy Access screen



The screenshot shows the SAP 'Display Log Tree' interface. The menu bar includes 'Log', 'Edit', 'Goto', 'View', 'Settings', 'System', and 'Help'. The toolbar contains various icons for file operations and navigation. The main area displays a tree structure for 'Log: Time Evaluation' with the following items:

- General data
  - Successful personnel numbers
  - Personnel numbers with errors
  - Personnel numbers ended early
  - Personnel Numbers Rejected
- Messages
- Statistics
 

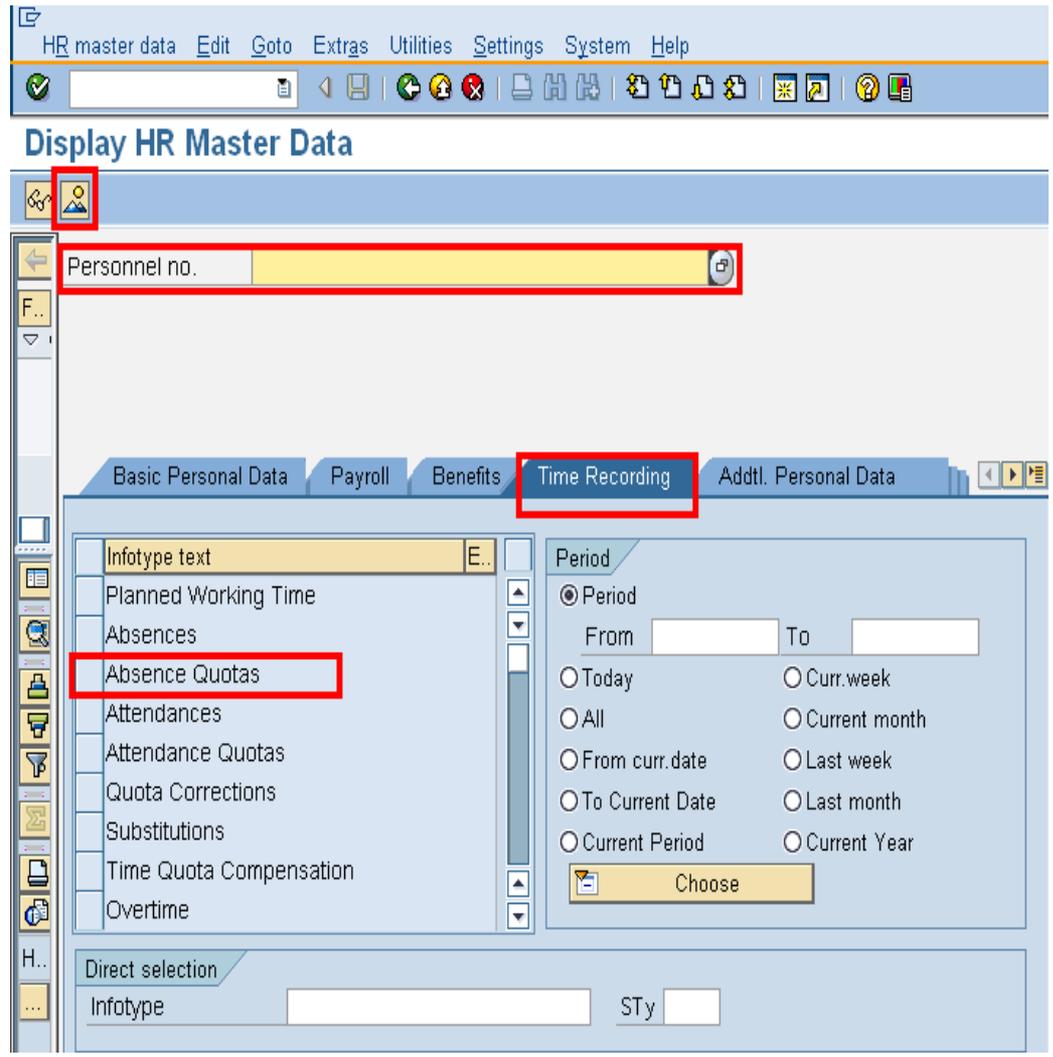
Selected personnel numbers	1
Successful runs for	1
including with errors	0
Processing not completed for	0
Rejected	0
Total number of messages and error messages	0

The 'Selected personnel numbers' and 'Successful runs for' rows are highlighted with a red box.

# Option 1: Replacing the System Generated

## Accrual cont'd.

- Enter /NPA20 in the command field
- Enter the personnel number
- Click  (Enter) to validate
- Select the  tab
- Enter the from date
- Click the gray box to the left of 
- Click  (overview) to display all records



# Option 1: Replacing the System Generated Accrual cont'd.

Infotype Edit Goto Extras System Help

Overview Absence Quotas (2006)

Choose

Personnel No. 40000223 Name CERWINSKI IRENE

PersArea 5400 Employment Security Dept EGroup 0 Permanent

PSubarea 0002 WMS ESubgroup 01 Monthly(M) OT Exe... Status Active

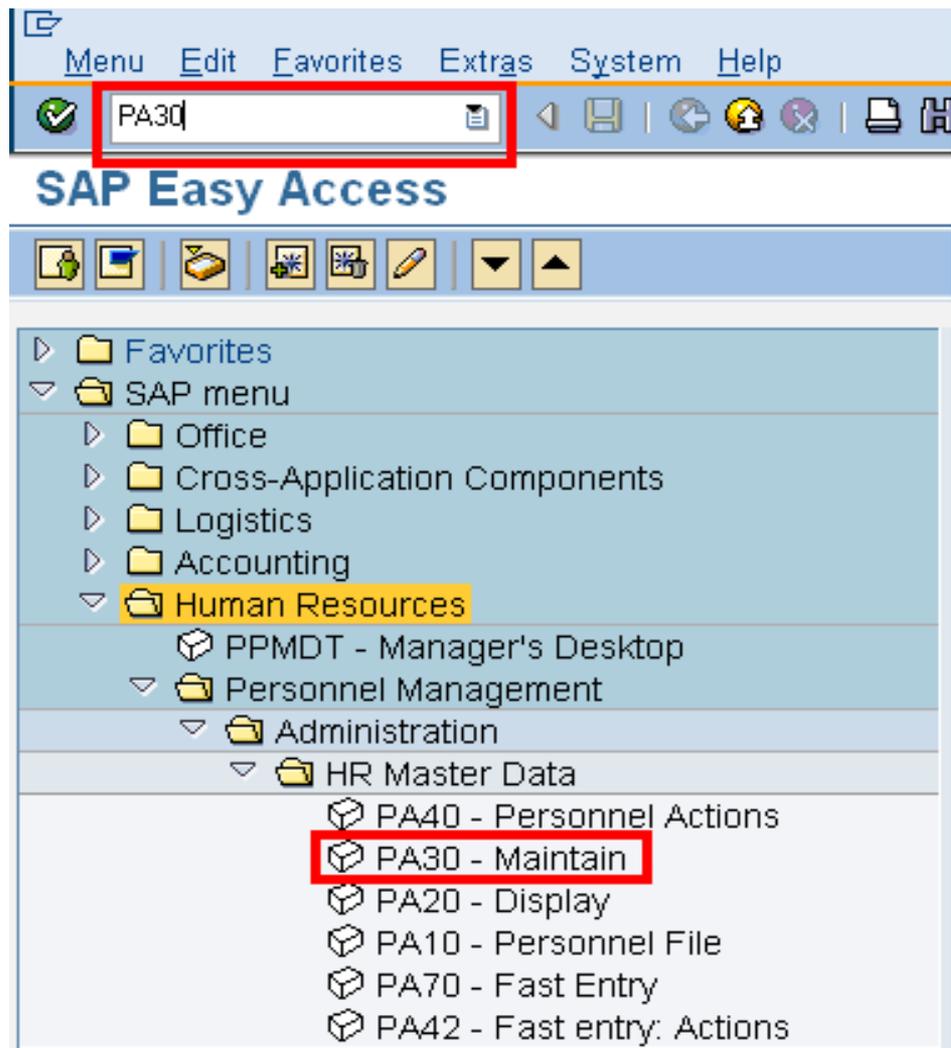
Choose 01/01/1800 To 12/31/9999 STy. 31

Start Date	End Date	A...	Quota text	Start ded	End ded.	Number	Deduction
01/01/2009	01/31/2009	31	Annual Leave/Vacation	01/16/2009	12/31/9999	14.66667	0.00000
12/01/2008	12/31/2008	31	Annual Leave/Vacation	12/16/2008	12/31/9999	14.66667	0.00000
11/01/2008	11/30/2008	31	Annual Leave/Vacation	11/16/2008	12/31/9999	14.66667	0.00000
10/01/2008	10/31/2008	31	Annual Leave/Vacation	10/16/2008	12/31/9999	12.00000	0.00000

- Verify the replacement was successful
- Click the  (Back) button to return to *Maintain HR Master*

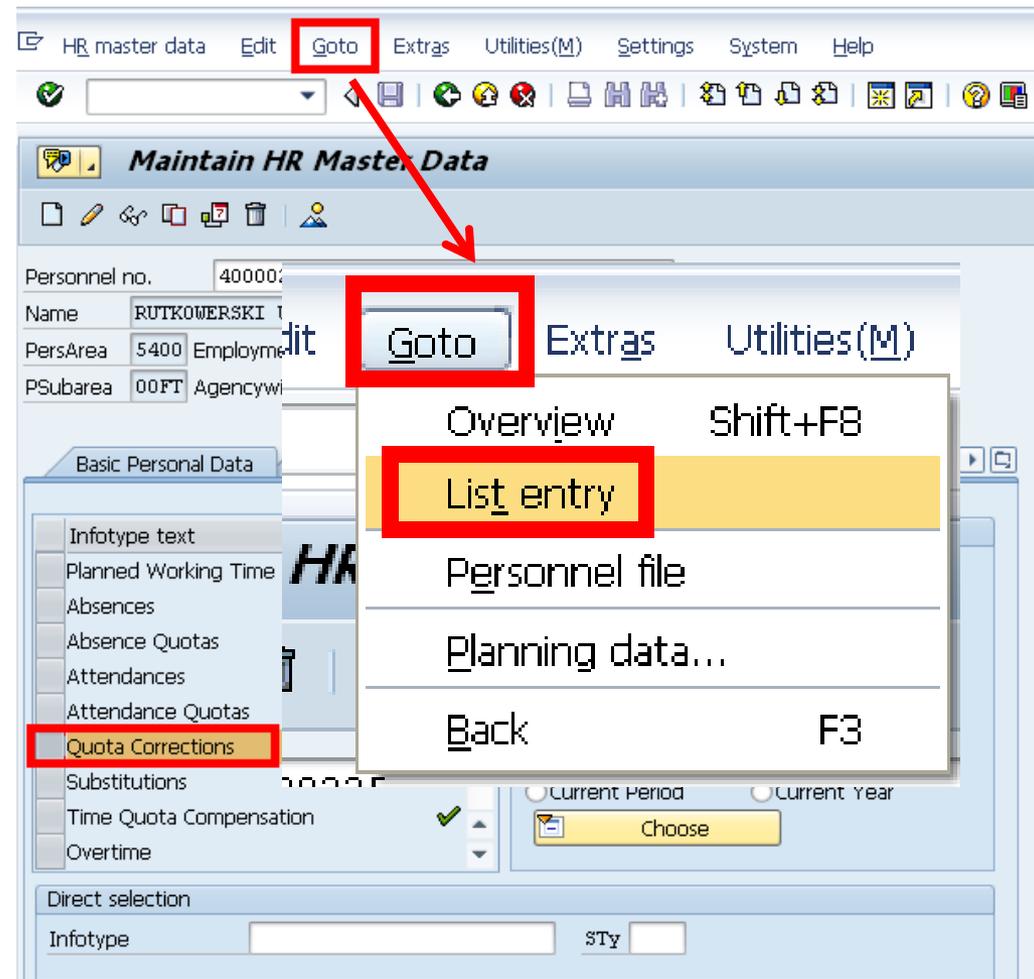
# Option 2: Accelerated accrual rates

- To display HR Master Data, follow menu path:  
Human Resources → Personnel Management → Administration → HR Master Data → Maintain
- You can also access the infotype by using the transaction code **PA30** (Maintain HR Master data)



# Option 2: Accelerated accrual rates cont'd.

- Enter Personnel Number
- Click  (Enter) to validate
- Select the **Time Recording** tab
- Select **Quota Corrections**
- On the menu bar select **Goto – List Entry**

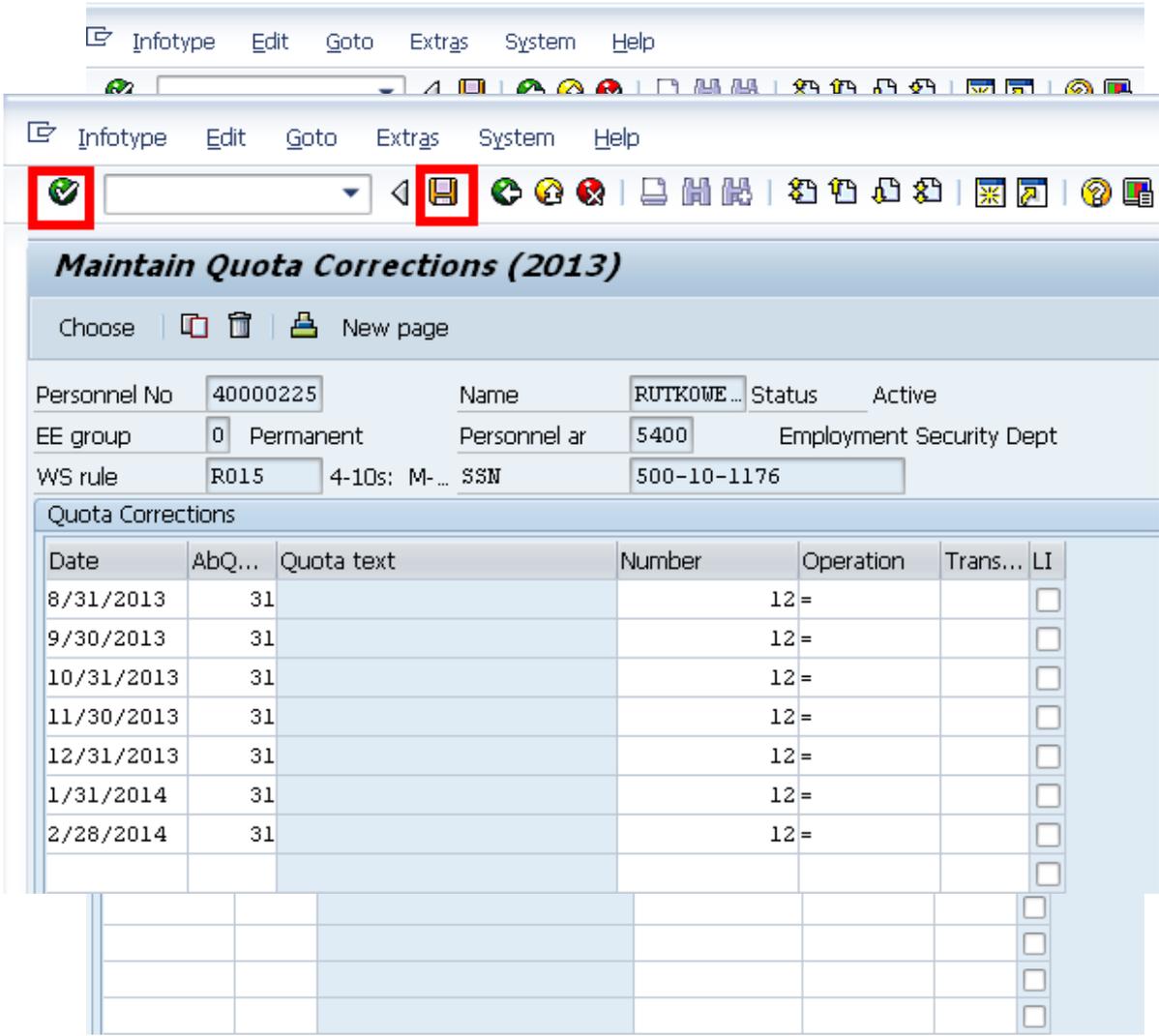


# Option 2: Accelerated accrual rates cont'd.

## Fields to complete:

- Date (Last day of accrual month)
- AbQuotaType
- Number
- Operation
- Transfer

- Click  (Enter) to validate
- Click  (Save) to save
- Run the **ZT60** to view accrual



The screenshot shows the 'Maintain Quota Corrections (2013)' window in an Infotype application. The window title is 'Maintain Quota Corrections (2013)'. Below the title bar, there are navigation buttons: 'Choose', 'New page', and a 'New page' button. The main form contains the following fields:

- Personnel No: 40000225
- Name: RUTKOWE...
- Status: Active
- EE group: 0 Permanent
- Personnel ar: 5400
- Employment Security Dept
- WS rule: R015
- 4-10s: M-...
- SSN: 500-10-1176

Below the form is a table titled 'Quota Corrections' with the following columns: Date, AbQ..., Quota text, Number, Operation, Trans..., and LI. The table contains the following data:

Date	AbQ...	Quota text	Number	Operation	Trans...	LI
8/31/2013	31			12=		<input type="checkbox"/>
9/30/2013	31			12=		<input type="checkbox"/>
10/31/2013	31			12=		<input type="checkbox"/>
11/30/2013	31			12=		<input type="checkbox"/>
12/31/2013	31			12=		<input type="checkbox"/>
1/31/2014	31			12=		<input type="checkbox"/>
2/28/2014	31			12=		<input type="checkbox"/>

# Option 2: Accelerated accrual rates cont'd.

## ■ Additional detail on Accelerated accrual rates:

- Once the future dated quota corrections are established, the accelerated accrual amounts will be available for the employee after the regular payroll processing.

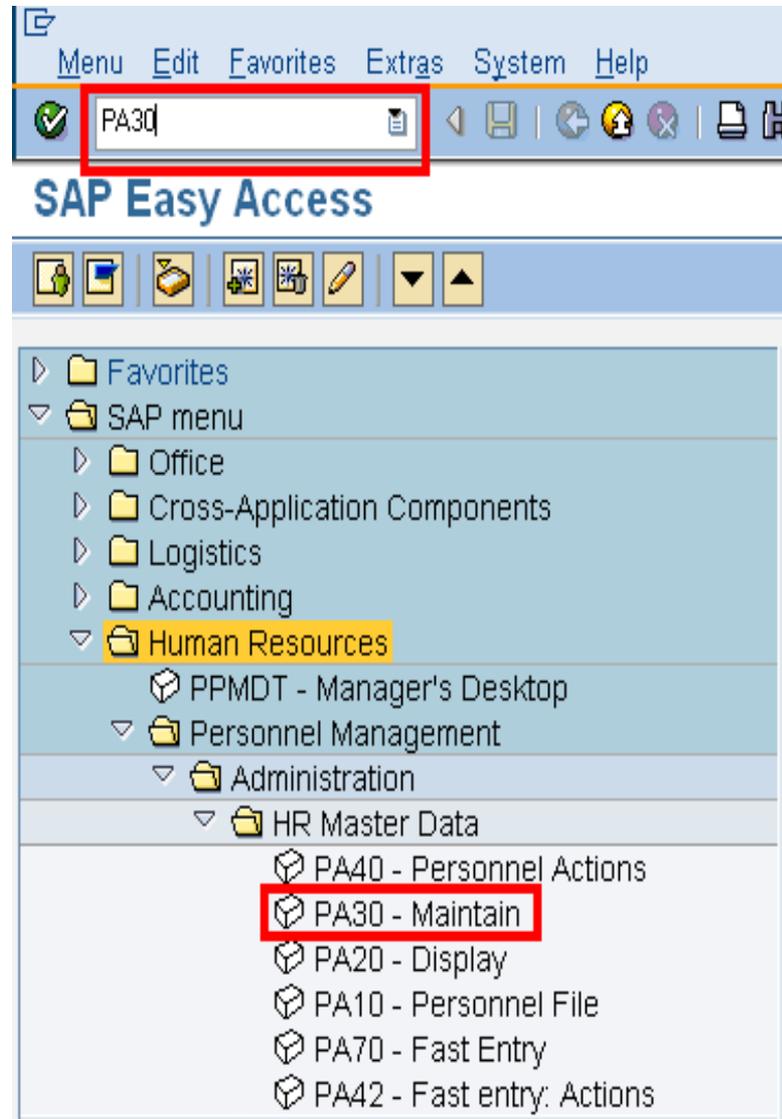


- Future dated quota corrections **must** be removed if an employee goes on **LWOP** and is not entitled to the leave accrual.

# Removing Accrued Leave

# Removing Accrued Leave

- To create a Quota Correction, follow menu path:  
Human Resources → Personnel Management → Administration → HR Master Data → Maintain
- You can also access the Quota Correction infotype by using the transaction code **PA30** (Maintain HR Master data)



# Removing Accrued Leave

- Enter the Personnel Number
- Select **Time Quota Compensation**
- Click **(Create)** to create a new record
- Select **Free Compensation**

The screenshot shows the 'Maintain HR Master Data' window. The 'Personnel no.' is 40000145 and the name is DALLAS ERIN. The 'Time Recording' tab is active, and the 'Subtypes for infotype "Time Quota Compensation" (1) 1' dialog is open. The 'Restrictions' section is visible, and the 'Free compensation' subtype is highlighted in the list.

ESG	PSG...	Comp.me...	Description
2	15	1000	Free compensation
2	15	9001	Sick Leave Buyout - Tax
2	15	9002	Sick Leave Buyout -No Tax
2	15	9003	Annl Leave Buyout-Ret
2	15	9004	Annl Leave Buyout -No Ret
2	15	9005	Sick Leave Buyout-Annual
2	15	9006	Comp Time Buyout
2	15	9007	Sick Leave Buyout - VEBA
2	15	9008	Comp Time Buyout-No Ret
2	15	9009	Holiday Credit Buyout WSP
2	15	9010	Settl LV Buyout WSP-NoRet
2	15	9011	Settl Lv Buyout WSP-Ret
2	15	9012	Hol. Cr. Buyout WSP-NoRet
2	15	9999	YTD Sick Lv Taken - Conv

# Removing Accrued Leave

## Fields to complete:

- Start
- Time quota type
- No. to compensate



Check **DO NOT ACCOUNT**

## Click (Enter) to validate

## Click (Save) to save

Infotype Edit Goto Extras System Help

Create Time Quota Compensation (0416)

Compensate Compensate all

Personnel No. 40000145 Name DALLAS ERIN

PersArea 1950 Liquor Control Board EEGroup 0 Permanent

PSubarea 000Z Tech/Clerical EESubgroup 01 Monthly(M) OT Exe... Status Active

Start 03/10/2011

Comp. method 1000 Free compensation

Compensation specifications

Automatic compensation

Manual compensation

Time quota type 31 Annual Leave/Vacation

Compensation rule

No. to compensate 10

Do not account

Absence quotas

ATy	Quota text	Entitl.	Unit	Comp.	Rem.
30	Sick Leave	24.20000	Hours	0.00000	8.20
30	Sick Leave	8.00000	Hours	0.00000	8.00
30	Sick Leave	8.00000	Hours	0.00000	8.00

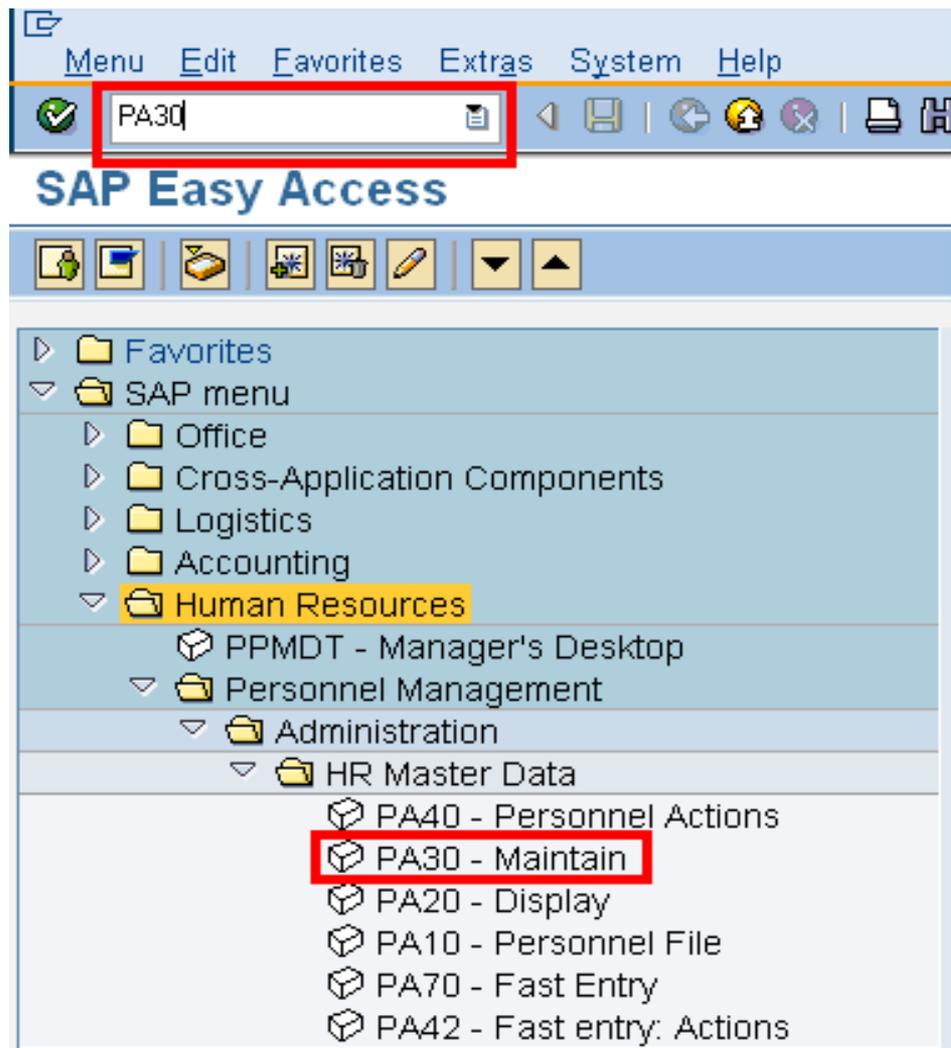
# Additional Scenarios

# Troubleshooting Common Quota Questions

- Scenario # 1 **Employee did not accrue quota as expected:**
- Enter the Transaction code **PA20** to check the following infotypes:
  - **Absence Quotas (2006)** Check to see if a record exists
  - **Planned Working Time (0007)** Verify the Additional Time ID field is set to “00” or “02”
  - **Payroll Results 2 (9402)** Verify the employee has sufficient hours worked to accrue leave
  - **Date Specifications (0041)** Verify the dates are correct
  - **Payroll Status (0003)** Verify that the PDC error indicator is **not** checked
  - **Actions (0000)** Check if the employee is “active” at the end of the accrual month
  - **Organization Assignment (0001)** Verify the employee belongs to the accrual agency
  - Run **Time Evaluation** with **displayed log** checked.

# Scenario # 2 Adjusting accrual rates

- To display HR Master Data, follow menu path:  
Human Resources → Personnel Management → Administration → HR Master Data → Maintain
- You can also access the infotype by using the transaction code **PA30** (Maintain HR Master data)



# Scenario # 2 Adjusting accrual rates

- Enter Personnel Number
- Click  (Enter) to validate
- Click the gray box to the left of  Date Specifications
- Click  (Overview) to display all
- Check the box to the left of the current record
- Click  (Copy) to copy the record

HR master data Edit Goto Extras Utilities Settings System Help

Maintain HR Master Data

Personnel no. 40000013

Name SEMANKO KEN

PersArea 3105 Wash Corrections Center EEGroup 0 Permanent

PSubarea 00TA Institutions EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Basic Personal Data Payroll Benefits Time Recording Addtl. Personal Data

Infotype text E..

Actions

Organizational Assignment

Personal Data

Addresses

Planned Working Time

Basic Pay

Contract Elements

**Date Specifications**

Family/Related Person

Period

Period

From 01/01/1800 To 12/31/9999

Today  Curr.week

All  Current month

From curr.date  Last week

To Current Date  Last month

Current Period  Current Year

Choose

Infotype Edit Goto Extras System Help

List Date Specifications (0041)

Personnel No. 40000013 Name SEMANKO KEN

PersArea 3105 Wash Corrections Center EEGroup 0 Permanent

PSubarea 00TA Institutions EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Choose 01/01/1800 to 12/31/9999

From	To	D..	Date	D..	Date	D..	Date	D..	Date	
<input checked="" type="checkbox"/>	08/29/2008	12/31/9999	01	08/29/2008	02	08/29/2008	03	08/29/2008	05	08/29/2008

# Scenario # 2 Adjusting accrual rates

## Fields to complete:

- Start Date
- Anniversary Date

## Click (Enter) to validate

## Click (Save) to save

Infotype Edit Goto Extras System Help

Copy Date Specifications (0041)

Personnel No. 40000013 Name SEMANKO KEN

PersArea 3105 Wash Corrections Center EEGroup 0 Permanent

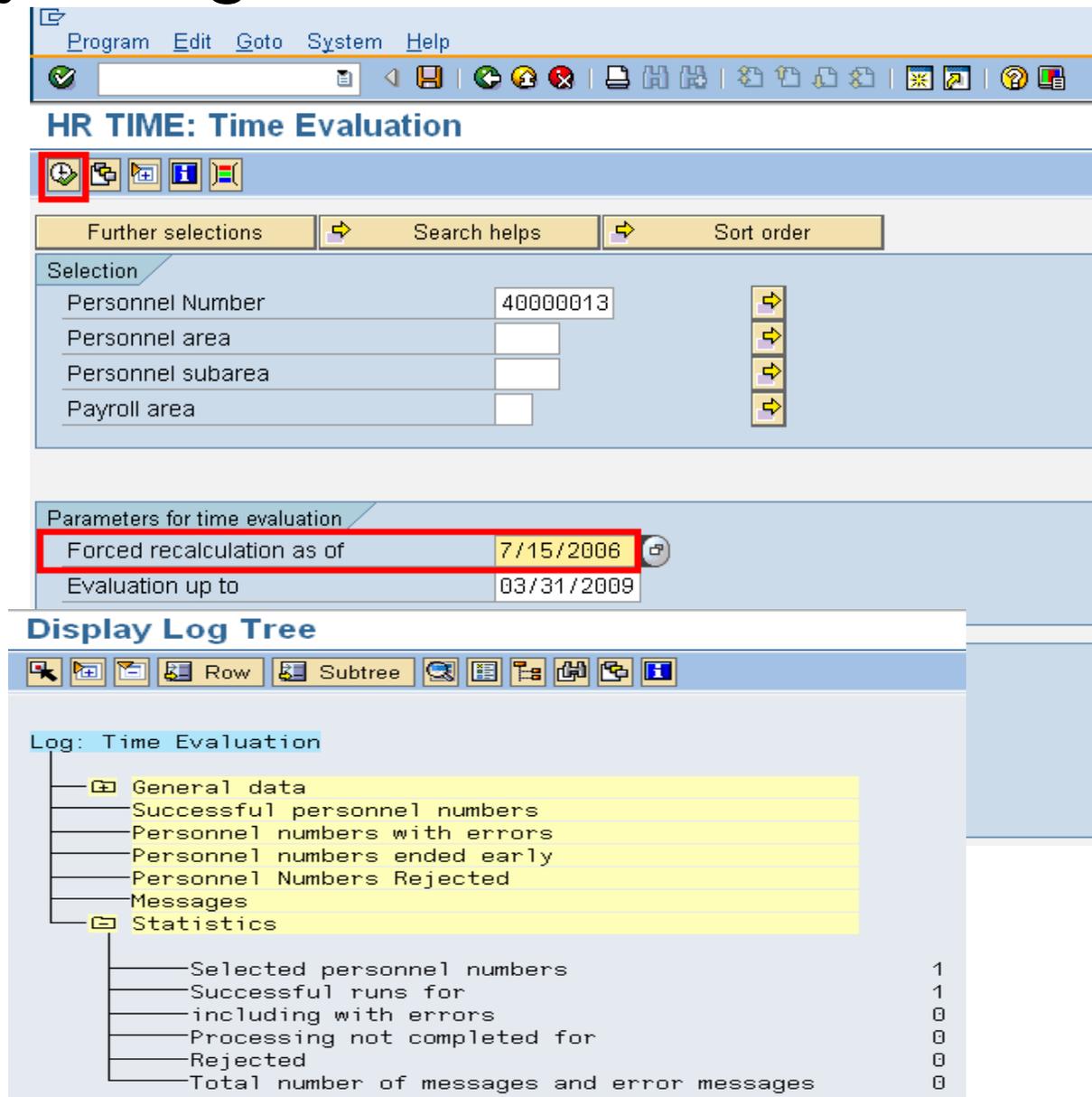
PSubarea 00TA Institutions EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 07/15/2006 to 12/31/9999

Date Specifications		Date type	Date	Date type	Date	
01	Anniversary Date	07/15/2006		02	Appointment Date	08/29/2008
03	Original Hire Date	08/29/2008		05	Seniority Date	08/29/2008
07	Unbroken Svc. Date	08/29/2008		09	Vac Lv Frozen UpTo	02/28/2009
18	Prsnl HolidayElgblty	08/29/2008				

# Scenario # 2 Adjusting accrual rates

- Enter the transaction code **/NZT60** in the command field
- Enter the employee's Personnel Number
- Forced recalculation as of– Date should match date entered on **Date Specification**
- Click  (Execute) to execute the process



The screenshot displays the SAP HR TIME: Time Evaluation interface. The menu bar includes Program, Edit, Goto, System, and Help. The command field contains the transaction code **/NZT60**. The main area is titled "HR TIME: Time Evaluation" and features a toolbar with icons for execution, search, and help. Below the toolbar, there are buttons for "Further selections", "Search helps", and "Sort order". A table lists selection criteria:

Selection		
Personnel Number	40000013	➔
Personnel area		➔
Personnel subarea		➔
Payroll area		➔

Below the selection table, the "Parameters for time evaluation" section is visible, with the "Forced recalculation as of" field highlighted in red and set to **7/15/2006**. The "Evaluation up to" field is set to **03/31/2009**.

The "Display Log Tree" window is open, showing a tree structure for "Log: Time Evaluation". The tree includes the following nodes:

- General data
  - Successful personnel numbers
  - Personnel numbers with errors
  - Personnel numbers ended early
  - Personnel Numbers Rejected
  - Messages
- Statistics
  - Selected personnel numbers
  - Successful runs for
  - including with errors
  - Processing not completed for
  - Rejected
  - Total number of messages and error messages

The right side of the log tree shows the following values:

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

# Scenario # 2 Adjusting accrual rates

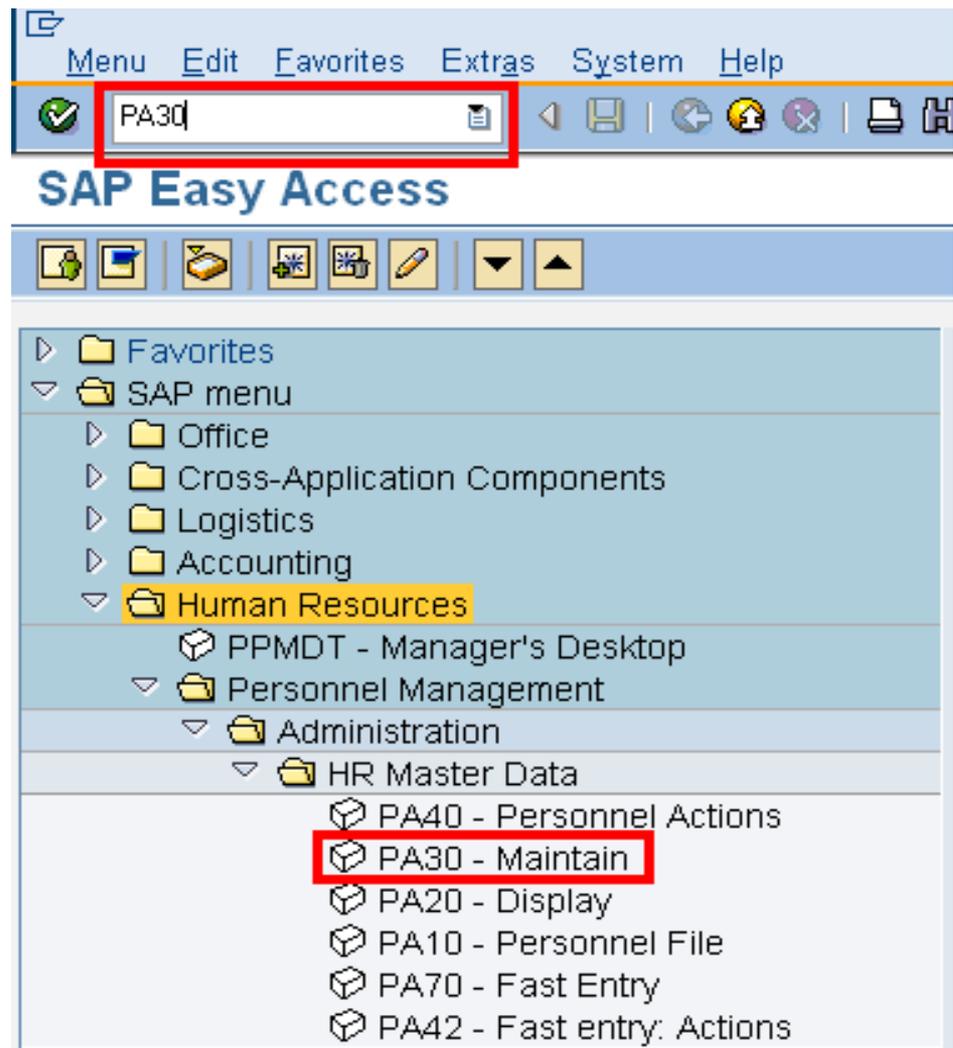
- Verify that the employee's accrual rates have been adjusted.
- If there are any deductions towards the employees' accruals you may need to contact the DES Service Center for a redistribution of quota

The screenshot displays a software interface for managing employee absence quotas. The title bar reads "Overview Absence Quotas (2006)". The interface includes a menu bar with options like "Infotype", "Edit", "Goto", "Extras", "System", and "Help". Below the menu is a toolbar with various icons. The main area shows employee information for SEMANKO KEN (Personnel No. 40000013) in the Wash Corrections Center (PersArea 3105). The employee's status is Active, and their accrual period is from 01/01/1800 to 12/31/9999. The "Absence Quotas" table below shows three entries for Annual Leave/Vacation, each with a quota of 10.66667 and a deduction of 0.00000. The "Number" column in the table is highlighted with a red box.

Start Date	End Date	A...	Quota text	Start ded	End ded.	Number	Deduction
11/01/2008	11/30/2008	31	Annual Leave/Vacation	02/28/2009	12/31/9999	10.66667	0.00000
10/01/2008	10/31/2008	31	Annual Leave/Vacation	02/28/2009	12/31/9999	10.66667	0.00000
09/01/2008	09/30/2008	31	Annual Leave/Vacation	02/28/2009	12/31/9999	10.66667	0.00000

# Scenario # 3 Giving a Personal Holiday

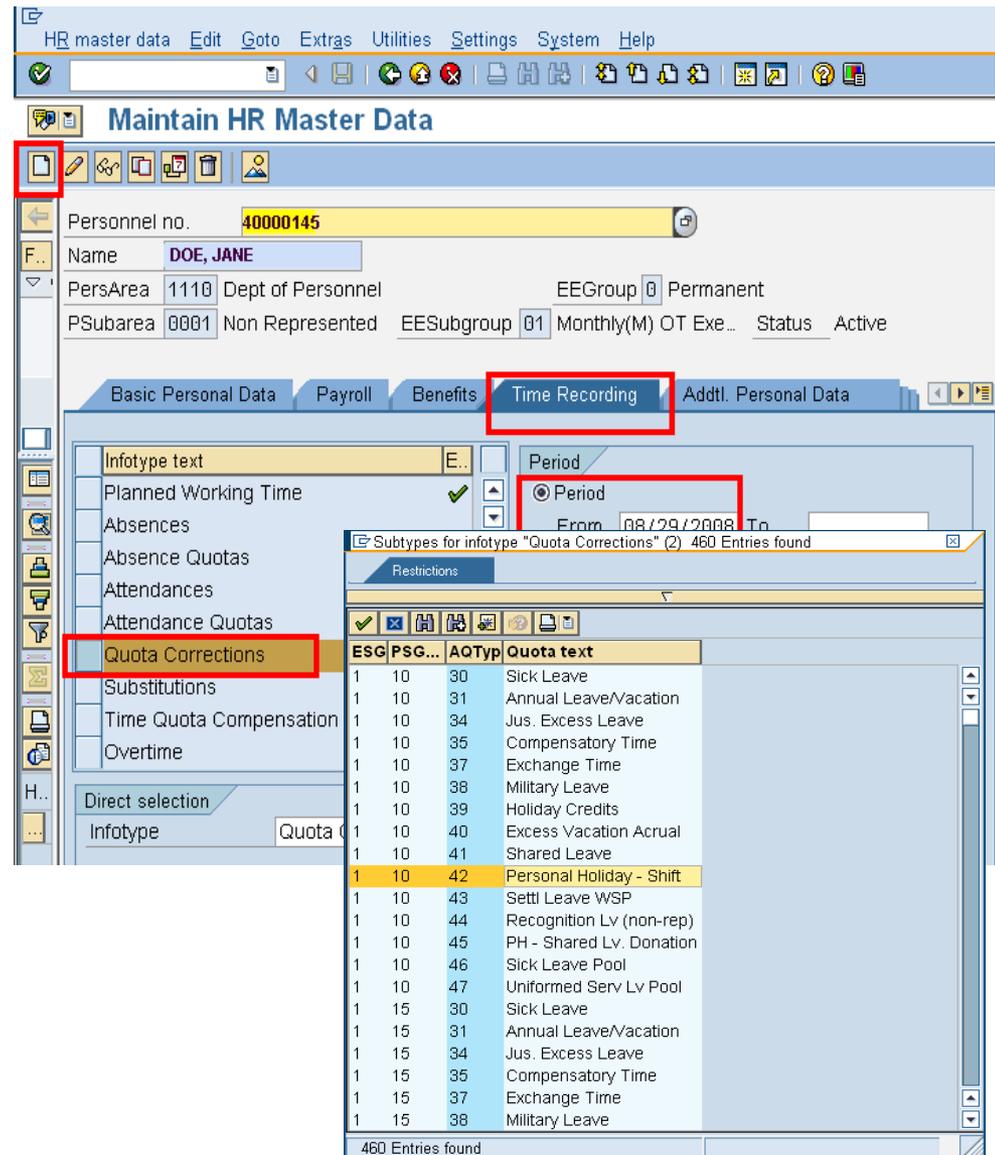
- To display HR Master Data, follow menu path:  
Human Resources → Personnel Management → Administration → HR Master Data → Maintain
- You can also access the infotype by using the transaction code **PA30** (Maintain HR Master data)



# Scenario # 3 Giving a Personal Holiday

cont'd.

- Enter Personnel Number
- Click  (Enter) to validate
- Select the **Time Recording** tab
- Enter the Start Date
- Click the gray box to the left of **Quota Corrections** select
- Enter the start date
- Click  (Create) to create new record
- Select **42 (Personal Holiday-Shift)**



The screenshot shows the 'Maintain HR Master Data' window for employee 'DOE, JANE' (Personnel no. 40000145). The 'Time Recording' tab is selected. A red box highlights the 'Quota Corrections' option in the left-hand menu. Another red box highlights the 'Period' radio button in the 'Period' section. A third red box highlights the '42 Personal Holiday - Shift' entry in the 'Subtypes for infotype "Quota Corrections" (2) 460 Entries found' dialog box.

ESG	PSG...	AOTyp	Quota text
1	10	30	Sick Leave
1	10	31	Annual Leave/Vacation
1	10	34	Jus. Excess Leave
1	10	35	Compensatory Time
1	10	37	Exchange Time
1	10	38	Military Leave
1	10	39	Holiday Credits
1	10	40	Excess Vacation Accrual
1	10	41	Shared Leave
1	10	42	Personal Holiday - Shift
1	10	43	Settl Leave WSP
1	10	44	Recognition Lv (non-rep)
1	10	45	PH - Shared Lv. Donation
1	10	46	Sick Leave Pool
1	10	47	Uniformed Serv Lv Pool
1	15	30	Sick Leave
1	15	31	Annual Leave/Vacation
1	15	34	Jus. Excess Leave
1	15	35	Compensatory Time
1	15	37	Exchange Time
1	15	38	Military Leave

 **Tip:**

Use the employee's hire date as the start date

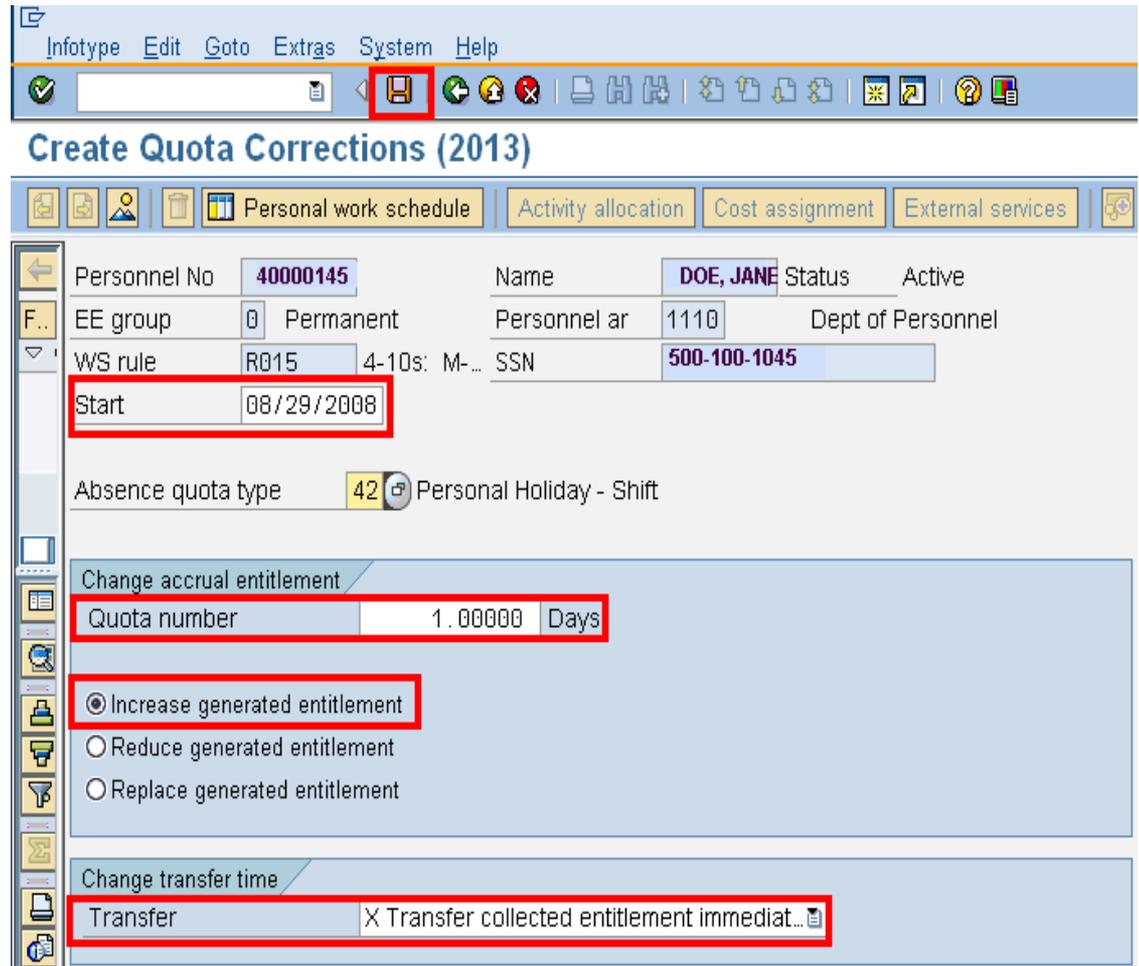
# Scenario # 3 Giving a Personal Holiday cont'd.

## ■ Fields to complete:

- *Quota Number* –
- *Increase generated entitlement*
- *Transfer collected entitlement immediately*

■ Click  (Enter) to validate

■ Click  (Save) to save



Infotype Edit Goto Extras System Help

Create Quota Corrections (2013)

Personal work schedule Activity allocation Cost assignment External services

Personnel No 40000145 Name DOE, JANE Status Active

EE group 0 Permanent Personnel ar 1110 Dept of Personnel

WS rule R015 4-10s: M-... SSN 500-100-1045

Start 08/29/2008

Absence quota type 42 Personal Holiday - Shift

Change accrual entitlement

Quota number 1.00000 Days

Increase generated entitlement

Reduce generated entitlement

Replace generated entitlement

Change transfer time

Transfer X Transfer collected entitlement immediat...

# Scenario # 3 Giving a Personal Holiday

cont'd.

- Enter the transaction code **/NZT60** in the command field
- Enter the employee's Personnel Number
- Evaluation up to Date – let default to the last day of the month
- Click  (Execute) to execute the process

Program Edit Goto System Help

HR TIME: Time Evaluation

Further selections Search helps Sort order

Selection			
Personnel Number			
Personnel area			
Personnel subarea			
Payroll area			

Parameters for time evaluation

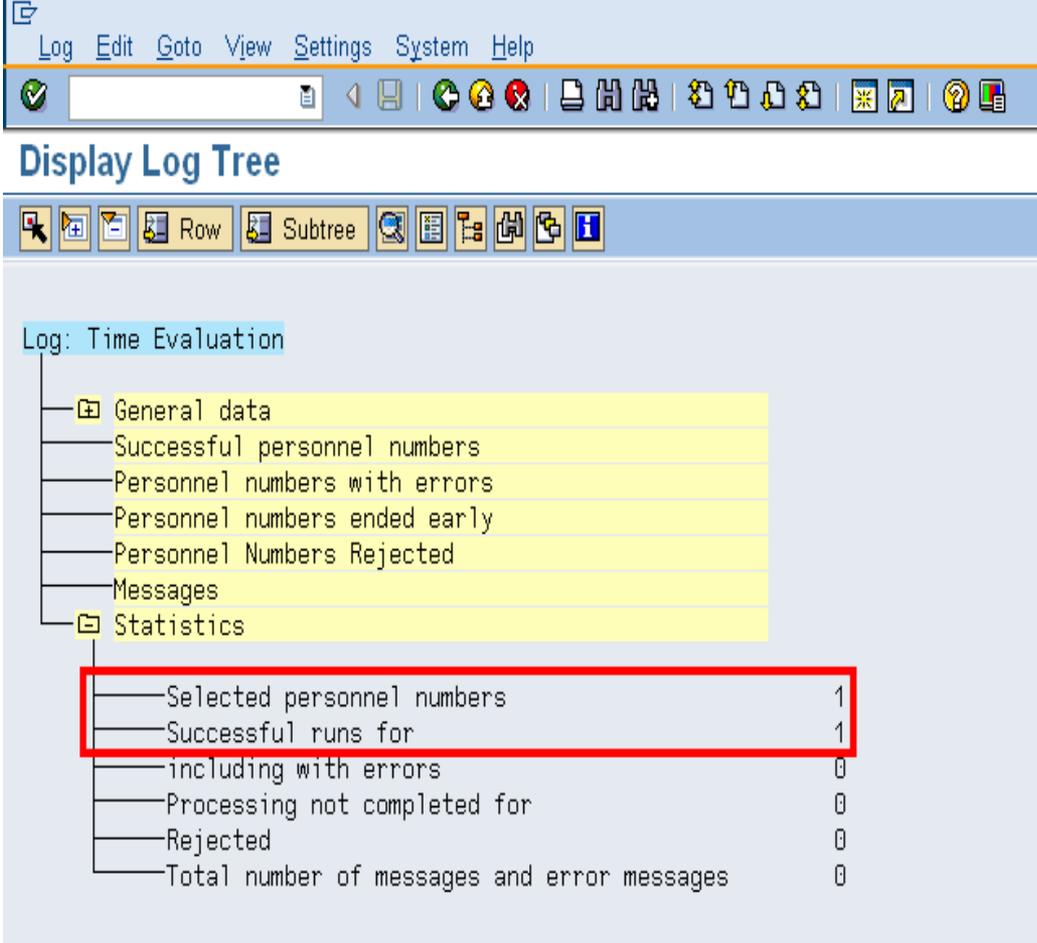
Forced recalculation as of	
Evaluation up to	12/31/2008

Program options

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

# Scenario # 3 Giving a Personal Holiday cont'd.

- Verify the time transfer was successful
- Click  (Exit) and return to the SAP Easy Access screen



The screenshot shows the SAP 'Display Log Tree' interface. The menu bar includes Log, Edit, Goto, View, Settings, System, and Help. The toolbar contains various icons for navigation and actions. The main area displays a tree structure for 'Log: Time Evaluation'. The 'General data' and 'Statistics' folders are expanded. The 'Statistics' folder contains a table with the following data:

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

The first two rows of the table are highlighted with a red box, indicating the successful personnel numbers and runs.

# Scenario # 3 Giving a Personal Holiday cont'd.

- Select the **Time Recording** tab
- Select *Absence Quotas (2006)*
- In the Period section, select the **All** radio button
- Click  (overview)



**Tip:**  
Enter the quota type **42** into the Sty field to narrow the search results

The screenshot shows the 'Maintain HR Master Data' application window. The 'Time Recording' tab is selected and highlighted with a red box. In the left-hand list, 'Absence Quotas' is selected and highlighted with a red box. The 'Period' section on the right has the 'All' radio button selected. At the bottom, the 'Sty' field is set to '42' and the resulting selection 'Personal Holiday - Shift' is highlighted with a red box. The personnel information at the top shows 'Personnel no. 40000145' and 'Name DOE, JANE'.

# Scenario # 3 Giving a Personal Holiday cont'd.

Infotype Edit Goto Extras System Help

Overview Absence Quotas (2006)

Choose

Personnel No. 40000145 Name DOE, JANE

PersArea 1110 Dept of Personnel EEGroup 0 Permanent

PSubarea . EESubgroup 06 M-OT Elig>40hrs/Wk Status Active

Choose 01/01/1800 To 12/31/9999 STy. 42

Absence Quotas

Start Date	End Date	A...	Quota text	Start ded	End ded.	Number
08/29/2008	08/29/2008	42	Personal Holiday - Shift	08/29/2008	12/31/2008	1.00000

# Scenario # 4 Negative Quota Correction- Employee has leave attached to a 0 (zero) deduction

Infotype Edit Goto Extras System Help

Overview Absence Quotas (2006)

Choose

Personnel No. 40000173 Name YELM LANNA

PersArea 3024 DSHS Region 4 EGroup Permanent

PSubarea 00JE Econ/Social Svcs ESubgroup 06 M-OT Elig>40hrs/wk Status Active

Choose 01/01/1800 To 12/31/9999 STy. 30

Absence Quotas

Start Date	End Date	A...	Quota text	Start ded	End ded.	Number	Deduction
10/01/2008	10/31/2008	30	Sick Leave	10/16/2008	12/31/9999	0.00000	5.00000
09/01/2008	09/30/2008	30	Sick Leave	09/16/2008	12/31/9999	8.00000	8.00000

## ■ Cause:

- Hours were entered into CATS and not removed prior to the quota correction
- Quota correction was created for employee to reduce their quota accrual

# Scenario # 4 Negative Quota Correction- Employee has leave attached to a 0 (zero) deduction con't.d

Overview Absence Quotas (2006)

Choose

Personnel No. 40000173 Name YELM LANNA

PersArea 3024 DSHS Region 4 EGroup 0 Permanent

PSubarea 00JE Econ/Social Svcs ESubgroup 06 M-OT Elig>40hrs/wk Status Active

Choose 01/01/1800 To 12/31/9999 STy. 30

Start Date	End Date	A...	Quota text	Start ded	End ded.	Number	Deduction
10/01/2008	10/31/2008	30	Sick Leave	10/16/2008	12/31/9999	0.00000	5.00000
09/01/2008	09/30/2008	30	Sick Leave	09/16/2008	12/31/9999	8.00000	8.00000

## ■ Steps for correcting:

- Click **choose** to determine when leave was used
- Remove entries from CATS
- Run the ZCAT6 to remove time entries within HRMS

# Scenario # 5 System allowing negative time to be entered

- It is possible to run the *Attendance System Change Report* that shows a negative leave balance.
  - **Possible causes:**
  - Quota correction (2013) entered incorrectly
  - Quota correction (2013) used to manipulate leave balances
  - Absence sitting on a zero accrual
  
- To do:
  - *Quota Correction (2013)*- view to determine why the quota correction was created
  - *Absence Quotas (2006)*- view to see if something has changed that caused the original accrual to be zero

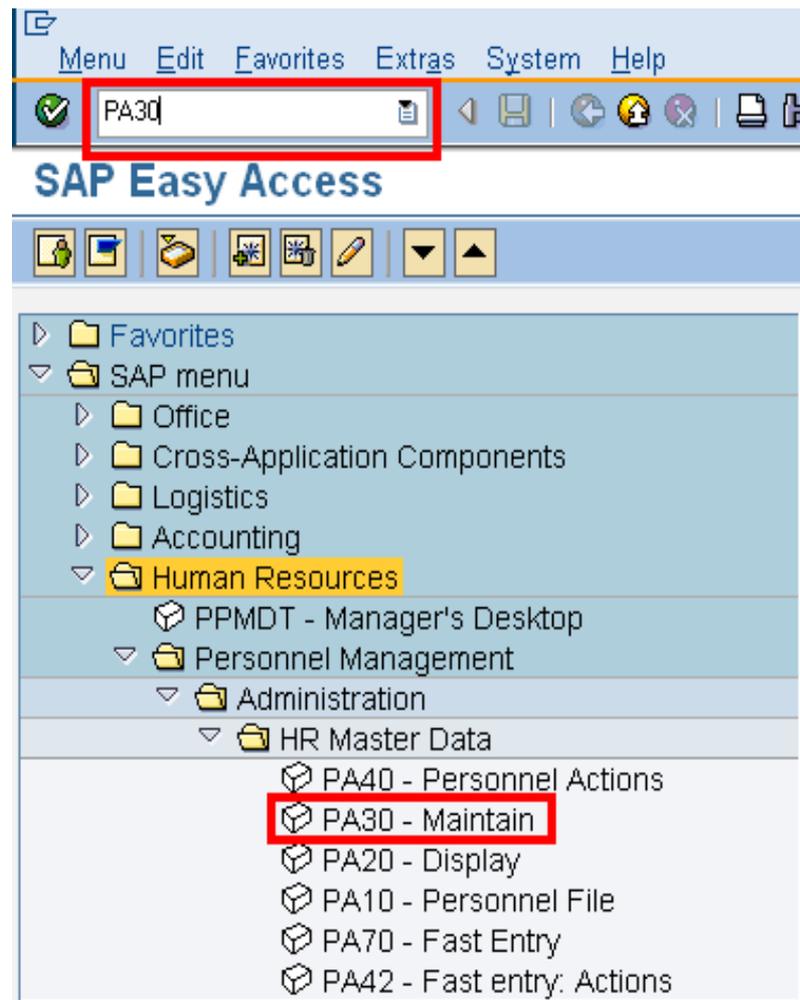
# Scenario # 6 Quota Buyouts

- **Quota buyout** – Process of buying out an eligible employee's quota balance
- Quota Buyouts are completed in *Time Quota Compensation* (0416)
- Some examples of buyouts include:
  - Annual Leave (retirement, separation)
  - Sick leave (retirement, separation)
  - Sick leave (annual buy-out process)
  - VEBA (retirement)
- Each agency may have unique rules, situations and procedures for quota buyout – check with your agency or bargaining unit for more specific instructions and parameters



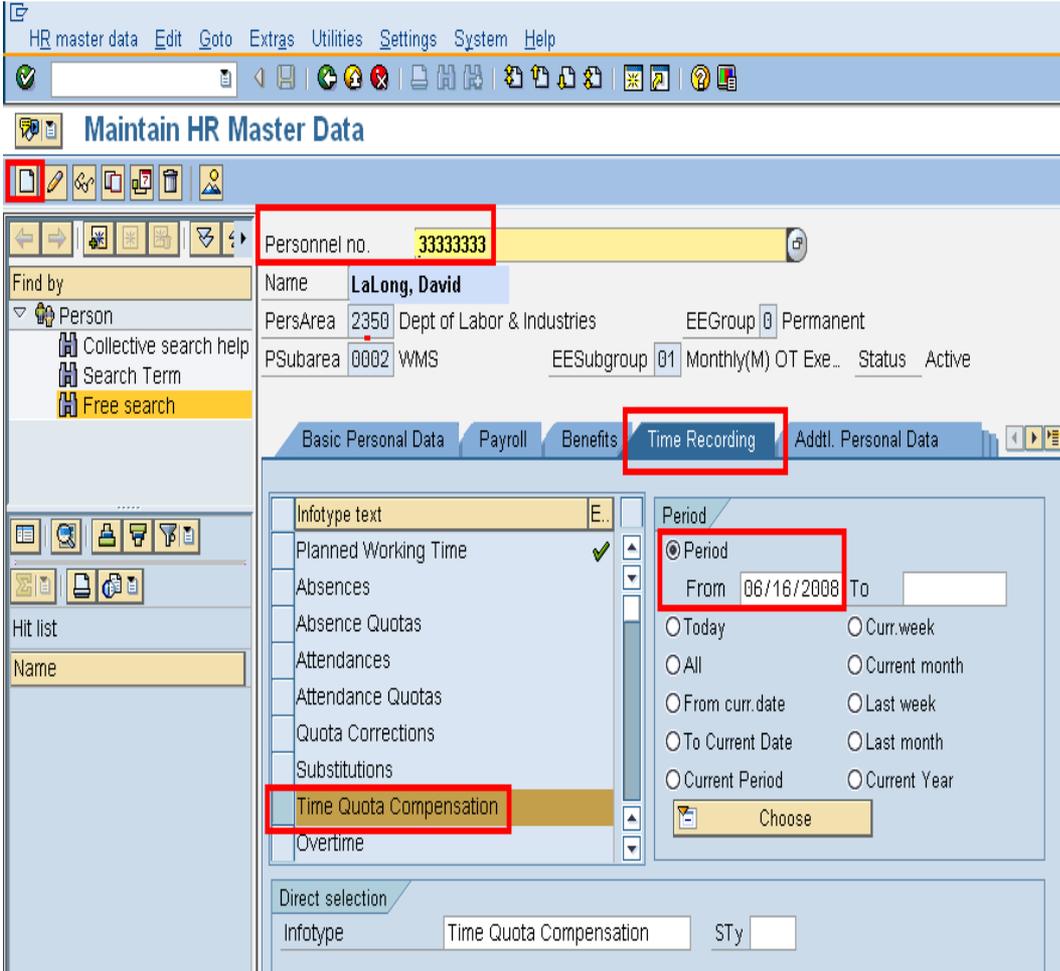
# Scenario # 6 Quota Buyouts cont'd.

- To create a quota buyout, follow menu path:  
Human Resources → Personnel Management → Administration → HR Master Data → Maintain
- You can also use the transaction code **PA30** (Maintain HR Master data)



# Scenario # 6 Quota Buyouts cont'd

- Enter *Personnel No.*
- Click the **Time Recording** tab
- Click the gray box to the left of **Time Quota Compensation**
- Enter the Start date
- Click  (Create)



HR master data Edit Goto Extras Utilities Settings System Help

Maintain HR Master Data

Personnel no. 33333333

Name LaLong, David

PersArea 2350 Dept of Labor & Industries EESubgroup 01 Permanent

PSubarea 0002 WMS Monthly(M) OT Exe... 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 06/16/2008 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 Time Quota Compensation STy

# Scenario # 6 Quota Buyouts cont'd

- Select the applicable wage type (example: Annl Leave Buyout-No Ret)
- Enter the buyout hours in *No. to compensate* field
- Ensure the accurate Start Date has been entered
- Click  (Enter) to validate
- Click  (Save) to save

Subtypes for infotype "Time Quota Compensation" (1)

ESG	PSG...	Comp.me...	Description
2	15	1000	Free compensation
2	15	9001	Sick Leave Buyout - Tax
2	15	9002	Sick Leave Buyout -No Tax
2	15	9003	Annl Leave Buyout-Ret
2	15	9004	Annl Leave Buyout -No Ret
2	15	9005	Sick Leave Buyout-Annual
2	15	9006	Comp Time Buyout
2	15	9007	Sick Leave Buyout - VEBA
2	15	9008	Comp Time Buyout-No Ret
2	15	9009	Holiday Credit Buyout WSP
2	15	9010	Settl LV Buyout WSP-NoRet
2	15	9011	Settl Lv Buyout WSP-Ret
2	15	9012	Hol. Cr. Buyout WSP-NoRet
2	15	9999	YTD Sick Lv Taken - Conv

Infotype Edit Goto Extras System Help

Create Time Quota Compensation (0416)

Personnel No. 422872 Name LAPALM SANDRA L

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 0002 WMS EESubgroup 01 Monthly(M) OT Exe... Status Active

Start 06/16/2008

Comp. method 9004 Annl Leave Buyout -No Ret

Compensation specifications

Time quota type 00

Compensation rule 031 Annual Holiday/Vacation

No. to compensate 161.30000

Do not account

Absence quotas

ATy	Quota text	Entitl.	Unit	Comp.	Rem.	WT	Amount	Curr...	Deduction fr...	Deduction to
30	Sick Leave	560.20000	Hours	0.00000	560.20000		0.00		<input type="checkbox"/> 06/16/2006	12/31/9999
31	Annual Leave/Vacation	161.30000	Hours	0.00000	161.30000		0.00		<input type="checkbox"/> 06/16/2006	12/31/9999
42	Personal Holiday - Shift	1.00000	Days	0.00000	1.00000		0.00		<input type="checkbox"/> 06/16/2006	12/31/9999

# Scenario # 7 Determining an employees Career Shared Leave balance

- Career Shared leave is tracked using the absence type 9941
- Each Shared leave absence taken in HRMS is added to the Career balance in 9941
- This report is used to monitor Career Shared Leave balances for employees
- Access the Cumulated Time Evaluation Results: Time Balances/Wage Types report using the transaction code **PT\_BAL00**



# Scenario # 7 Determining an employees Career Shared Leave balance cont'd.

Program Edit Goto System Help

Cumulated Time Evaluation Results: Time Balances/Wage Types

Further selections Search helps Sort order Org. structure

Payroll period

Payroll area	11	from	10/01/2008	To	10/15/2008
Current period	20	2008			
Other period					

Period

Selection

Personnel Number

Personnel area 1110

Time recording administrator

Selection Conditions

Day balances 9941

Cumulated balances

Time wage types

Value limits (hours) for time/wage types

Take account of value limits (hours)

Data format

Layout

## Fields to complete:

- *Payroll period*
- *Selection*: Enter a personnel number or personnel area
- *Selection Conditions* – select *Day balances* and enter the Time Type 9941 (Career Shared Leave Total)

- Click  (Execute) to generate the report

# Scenario # 7 Determining an employees Career Shared Leave balance cont'd.

List Edit Goto Settings System Help

Cumulated Time Evaluation Results: Time Balances/Wage Types

Choose Save Print preview

## Day balances

Data select. period 09/01/2008 - 09/15/2008

Pers.No.	Employee/app.name	Period	Current Date	TmType	Time type descript.	Number
<b>Employee names and personnel numbers have been removed</b>		200809	09/01/2008	9941	Career Shared Leave Total	54.50
		200809	09/02/2008	9941	Career Shared Leave Total	54.50
		200809	09/03/2008	9941	Career Shared Leave Total	54.50
		200809	09/04/2008	9941	Career Shared Leave Total	59.20
		200809	09/05/2008	9941	Career Shared Leave Total	59.20
		200809	09/06/2008	9941	Career Shared Leave Total	59.20
		200809	09/07/2008	9941	Career Shared Leave Total	59.20
		200809	09/08/2008	9941	Career Shared Leave Total	59.20
		200809	09/09/2008	9941	Career Shared Leave Total	65.24
		200809	09/10/2008	9941	Career Shared Leave Total	73.24
		200809	09/11/2008	9941	Career Shared Leave Total	81.24
		200809	09/12/2008	9941	Career Shared Leave Total	89.24
		200809	09/13/2008	9941	Career Shared Leave Total	89.24
		200809	09/14/2008	9941	Career Shared Leave Total	89.24

# Review Questions

## 1. True or False

**If an employee does not accrue quota as expected you should first do a quota correction to give the employee the correct accrual amount?**

## 2. On which infotype are buyouts created?

## 3. Which report will display an employees career shared leave balance?

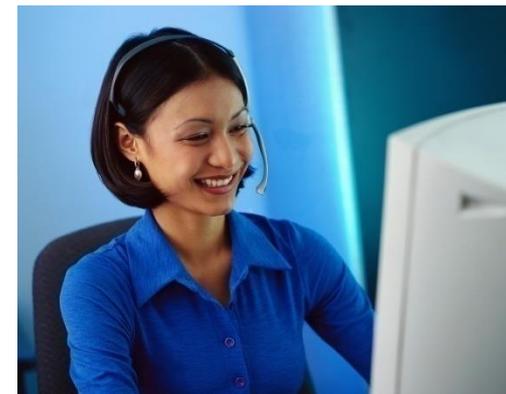
# Summary

- Throughout this course you have learned to:
  - Define new terms and key components of quota accruals
  - Define how to view employee accruals
  - Create and maintain shared leave quota for both same and cross agency donations
  - Create a manual adjustments
  - Create a leave buyout during the separation action
  - How to access and run HRMS reports

# Resources

## ■ *The following resources are available for your use:*

- DES Service Center– (360) 664–6400
  - [servicecenter@dop.wa.gov](mailto:servicecenter@dop.wa.gov)
- The Office of Financial Management
  - <http://www.ofm.wa.gov>
- The Department of Retirement Services
  - <http://www.drs.wa.gov>
- The On-Line Quick Reference
  - <http://www.hr.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/default.aspx>
- HRMS Support
  - <http://www.hr.wa.gov/payroll/HRMS/HRMSSupport/Pages/default.aspx>



# HRMS Support

The screenshot shows the HRMS Support page. At the top, there is a navigation bar with links for 'Contact DOP', 'About Us', 'Topic Index A-Z', 'Forms', 'Publications', and 'Calendar'. Below this is the 'HR' logo and 'Washington State Department of Personnel'. A search bar with a 'GO' button is also present. A horizontal menu contains links for 'Home', 'Strategic HR', 'Compensation & Job Classes', 'Training', 'Recruitment', 'Rules', 'Diversity', 'Payroll', and 'More DOP Services'. The 'Payroll' link is highlighted, and a breadcrumb trail shows 'Home > Payroll > Human Resource Management System > HRMS Support'. A 'Print Friendly' link is in the top right. On the left, a sidebar menu lists 'Payroll - HRMS' (highlighted), 'HRMS Support', 'Payroll Calendars & Schedules', 'Training', and 'On-Line Quick Reference'. The main content area features the title 'HRMS Support' and a paragraph describing the system as the enterprise HR and payroll system for Washington State government, serving approximately 70,000 employees across 100 agencies. It details the system's role in supporting HRMS, software applications, and activities like payroll, benefits, and strategic planning. A second paragraph states the department's commitment to first-class customer service. A bulleted list of links includes 'Message Center', 'Payroll & Financial Errors', 'HRMS Training', 'Business Intelligence Training', 'ISD Help Desk', 'On-Line Quick Reference', 'Personnel/Payroll Association', and 'Security'. A 'Related Links' box contains 'HRMS Service Level Agreements' and a 'Contact Us' box provides the phone number '360-664-6400' and an 'E-Mail' link. The page is updated as of 03/16/09.

Contact DOP | About Us | Topic Index A-Z | Forms | Publications | Calendar

**HR** Washington State Department of Personnel

Home Strategic HR Compensation & Job Classes Training Recruitment Rules Diversity Payroll More DOP Services

Home > Payroll > Human Resource Management System > HRMS Support [Print Friendly](#)

## HRMS Support

The Human Resource Management System (HRMS) is the enterprise HR and payroll system for Washington State government. HRMS captures and distributes statewide personnel, payroll, and financial data, and produces paychecks for approximately 70,000 employees in more than 100 agencies.

Supporting HRMS, and the other systems, software applications, and activities that work together to pay employees, coordinate benefits, and foster strategic planning, is a key function of the Department of Personnel.

We have the skills, knowledge, and commitment to offer first class customer service, training, online help documentation, communications, and security solutions to help you, our users, understand and perform your work. Whether you are trying to complete a complex payroll action, run a report for your business needs, or just want to search for information online, we can help!

- [Message Center](#)
- [Payroll & Financial Errors](#)
- [HRMS Training](#)
- [Business Intelligence Training](#)
- [ISD Help Desk](#)
- [On-Line Quick Reference](#)
- [Personnel/Payroll Association](#)
- [Security](#)

**Related Links**

[HRMS Service Level Agreements](#)

**Contact Us**

360-664-6400 or [E-Mail](#)

Updated: 03/16/09

**Address:**

**<http://www.hr.wa.gov/payroll/HRMS/HRMSSupport/>**

# HRMS Message Center

[Contact DOP](#) | [About Us](#) | [Topic Index A-Z](#) | [Forms](#) | [Publications](#) | [Calendar](#)



Washington State  
Department of Personnel

GO

Home

Strategic HR

Compensation & Job Classes

Training

Recruitment

Rules

Diversity

Payroll

More DOP Services

Payroll - HRMS

- [HRMS Support](#) ▶
- [Payroll Calendars & Schedules](#)
- [Training](#)
- [On-Line Quick Reference](#)

[Home](#) > [Payroll](#) > [Human Resource Management System](#) > [HRMS Support](#) > [Message Center](#) [Print Friendly](#)

## Message Center

The Human Resource Management System Message Center provides system related messages for professional users.

When an urgent issue or update needs to be communicated to HRMS users, HRMS Support transmits an on-line alert that instructs users to access the HRMS message center for an update.

The types of messages that could be logged in the message center also include:

- notification of issues that require **immediate** action
- system updates
- changes in system availability

### Related Documents

- » [Archived Messages](#)
- » [July-Oct 2008](#)
- » [Jan-June 2008](#)
- » [Nov-Dec 2007](#)
- » [Jun-Oct 2007](#)
- » [Jan-May 2007](#)
- » [Mar-Dec 2006](#)

### Contact Us

360-664-6400 or [E-Mail](#)

Date/Time	HRMS Message Log
03/16/2009 10:52 a.m.	<p><b>Attention HRMS Users:</b></p> <p>Please click on this link for information regarding <a href="#">Display User-Generated Time Quota Comp (IT0416) records on Reports</a>. Thank you.</p>

Address:

<http://www.hr.wa.gov/payroll/HRMS/HRMSSupport/Pages/>

# HRMS Data Definitions

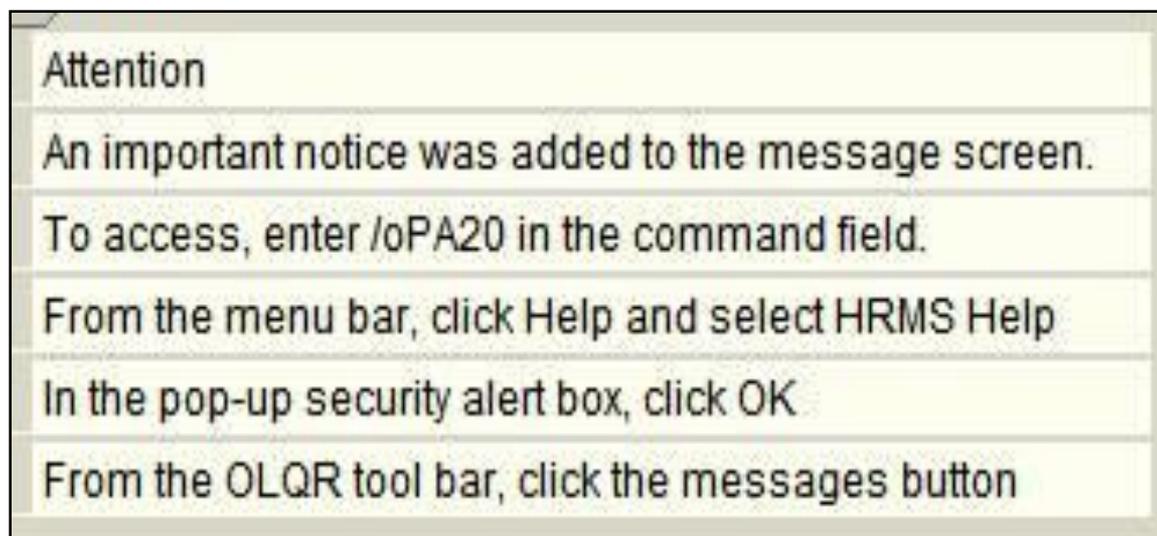
■ **HRMS Data Definitions website** provides agencies with standard definitions of HRMS fields names and dropdown list options.

The screenshot shows the Washington State Department of Personnel HRMS website. The navigation menu includes Home, Strategic HR, Compensation & Job Classes, Training, Recruitment, Rules, Diversity, Payroll, and More DOP Services. The main content area is titled 'On-Line Quick Reference' and contains a list of links: Functional Areas and Roles, Job Aids, HRMS Reports, User Procedures, Course Manuals, Glossary, and HRMS Data Definitions Project. The 'HRMS Data Definitions Project' link is highlighted with a red box. Below the list, there is a search bar for the OLQR and a link for 'HRMS Data Definitions Project » - New!' also highlighted with a red box. The left sidebar shows a dropdown menu for 'On-Line Quick Reference' with a red box around it. The right sidebar contains 'Portal Access', 'Related Documents', and 'Contact Us' sections.

website address:  
<http://www.hr.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/HRMSDataDefinitions.aspx>

# ZAlert System Messages

- Messages are sent by the ISD Customer Support unit and will appear when logged into the system or when first logging in.
  - ZAlerts will last up to 2 hours after being displayed. Once the message has expired you will no longer see the message.
- Messages will vary and may contain information regarding payroll pick-up or may direct you to the HRMS Message Center.



# Question and Answer



# Training Evaluation

- Please take a few minutes to complete the course evaluation and participant assessment prior to leaving.



**Thank you for  
your participation**

# ***Additional Information***

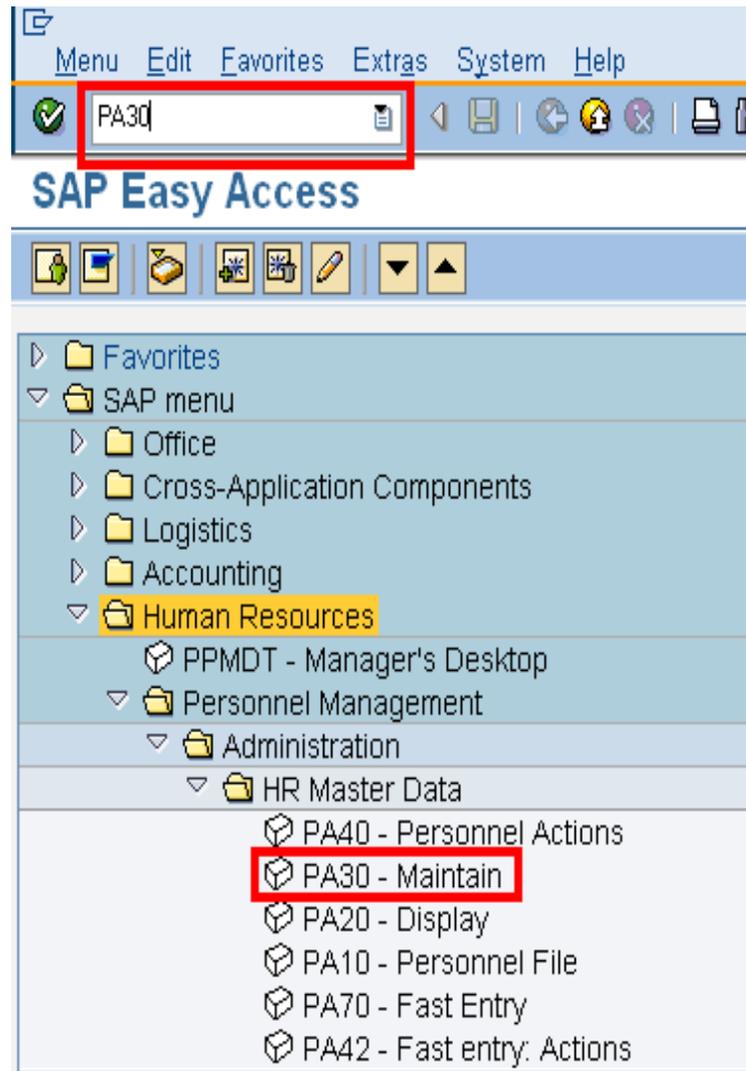
# Sick Leave Pool

# Sick Leave Pool Overview

- Employee's are eligible to participate in the Sick Leave Pool after completing one year of continuous service and accruing at least forty-eight hours of sick leave
- Refer to the user procedure **Sick Leave Pool Create Eligibility** and **Sick Leave Pool Create the Donation and Return** on the OLQR for assistance.

# Sick Leave Pool

- To create the Sick Leave Pool Data, follow menu path: Human Resources → Personnel Management → Administration → HR Master Data → Maintain
- You can also use the transaction code **PA30** (Maintain HR Master data)



# Step 3

## Create Shared Leave Eligibility

- Enter PA30 in the Command field.

- Select the **Time Recording** tab

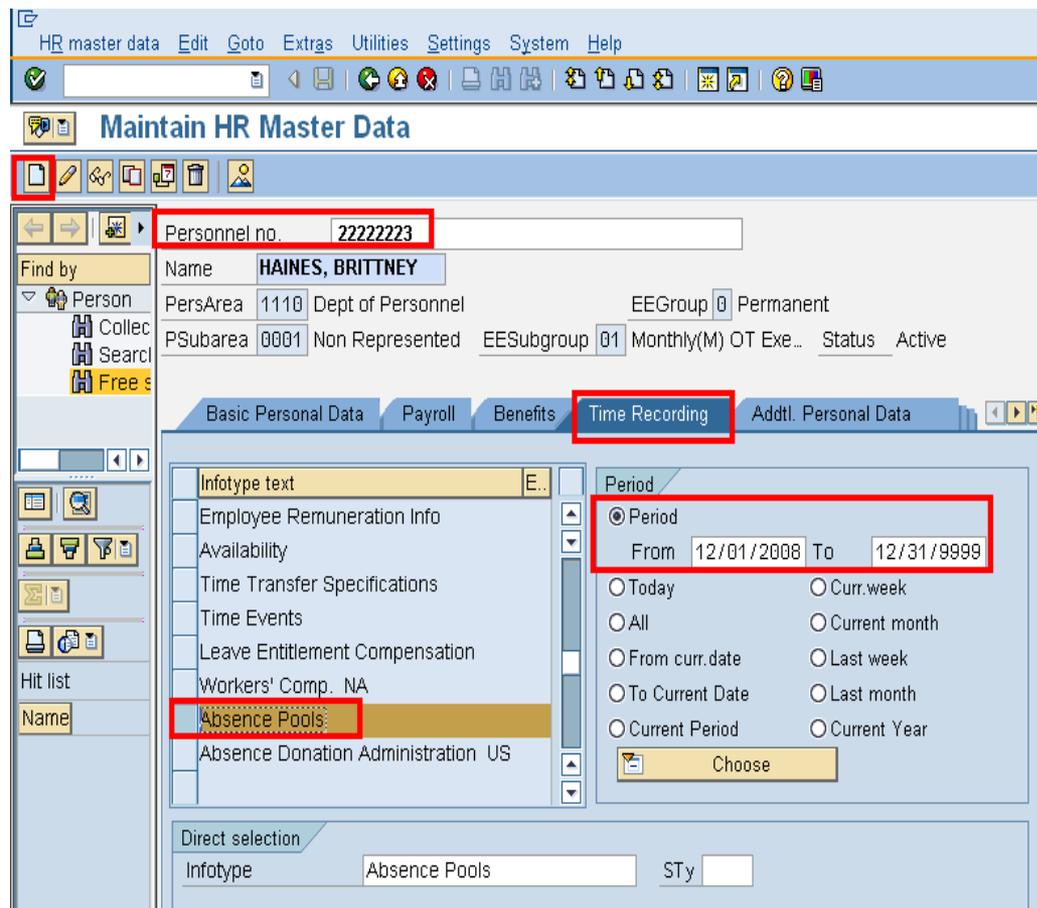
- Verify the Personnel Number

- Click  (Enter) to validate

- Enter the From date

- Click the gray box to the left of *Absence Pools* (0696) to select

- Click  (Create) to create a new record



The screenshot shows the 'Maintain HR Master Data' application window. The 'Time Recording' tab is selected. The 'Personnel no.' field contains '22222223'. The 'Absence Pools' field is highlighted in the list. The 'Period' section shows 'From 12/01/2008 To 12/31/9999'.

**Note:**

To find the Absence Pools scroll down towards the bottom of the Time Recording Tab

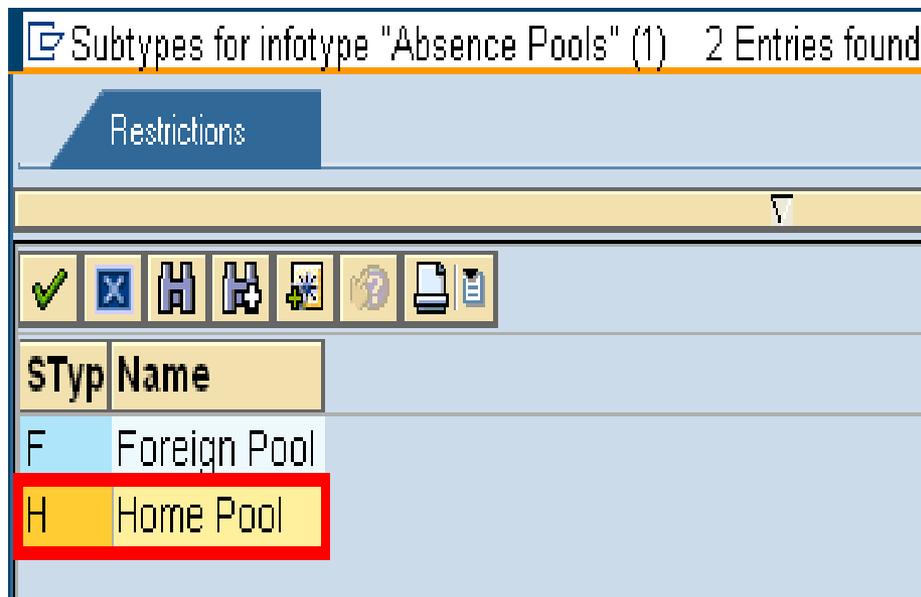
# Step 3

## Create Shared Leave Eligibility cont'd.

- In the pop-up window select  Home Pool

### **Note:**

The Foreign Pool is to be selected only if creating the eligibility for the Uniformed Services Pool, or Sick Leave Pool. These will be covered later in the class.



# Step 3

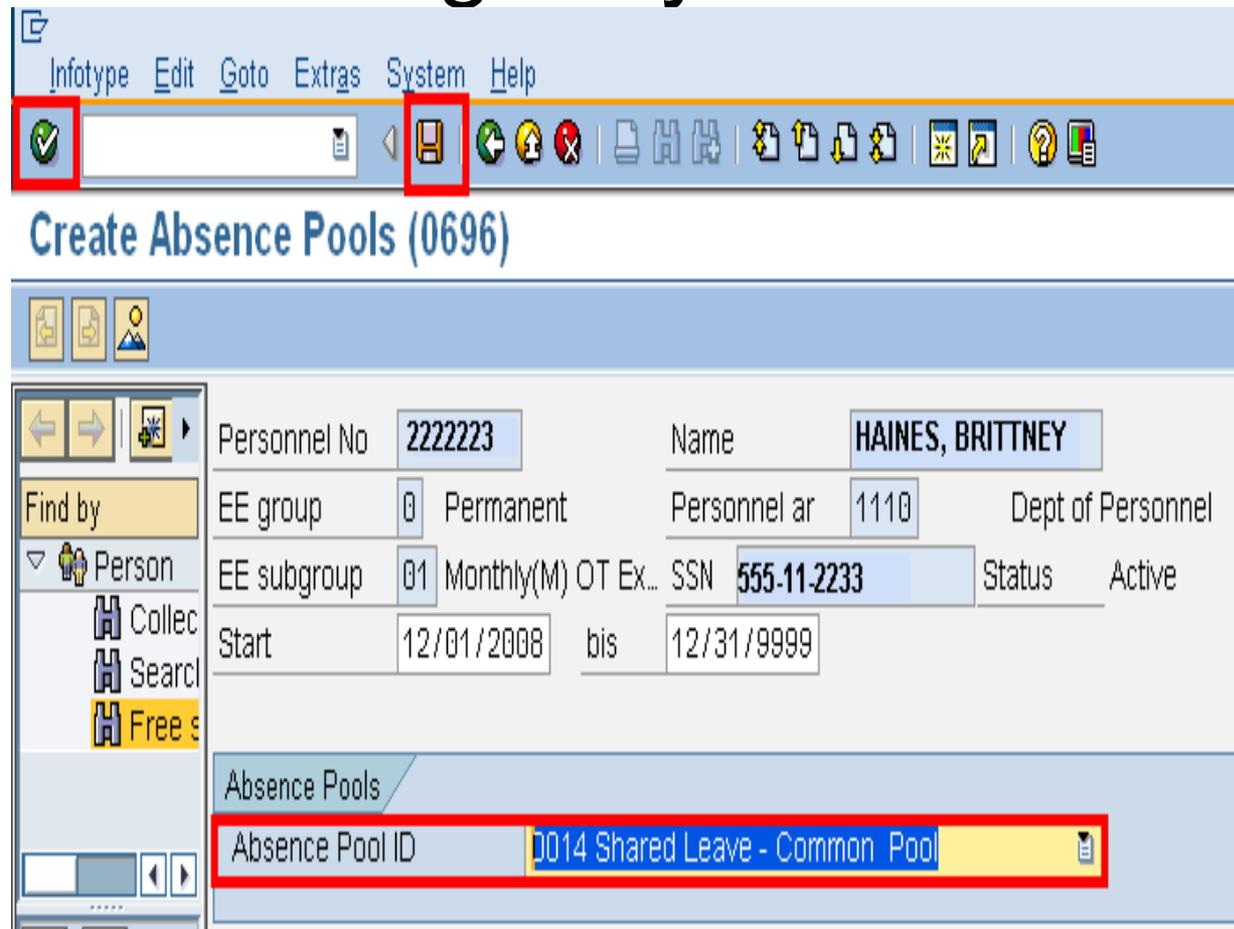
## Create Shared Leave Eligibility cont'd.

### Fields to complete:

– *Absence Pool ID*

Click  (Enter) to validate

Click  (Save) to save



Infotype Edit Goto Extras System Help

Create Absence Pools (0696)

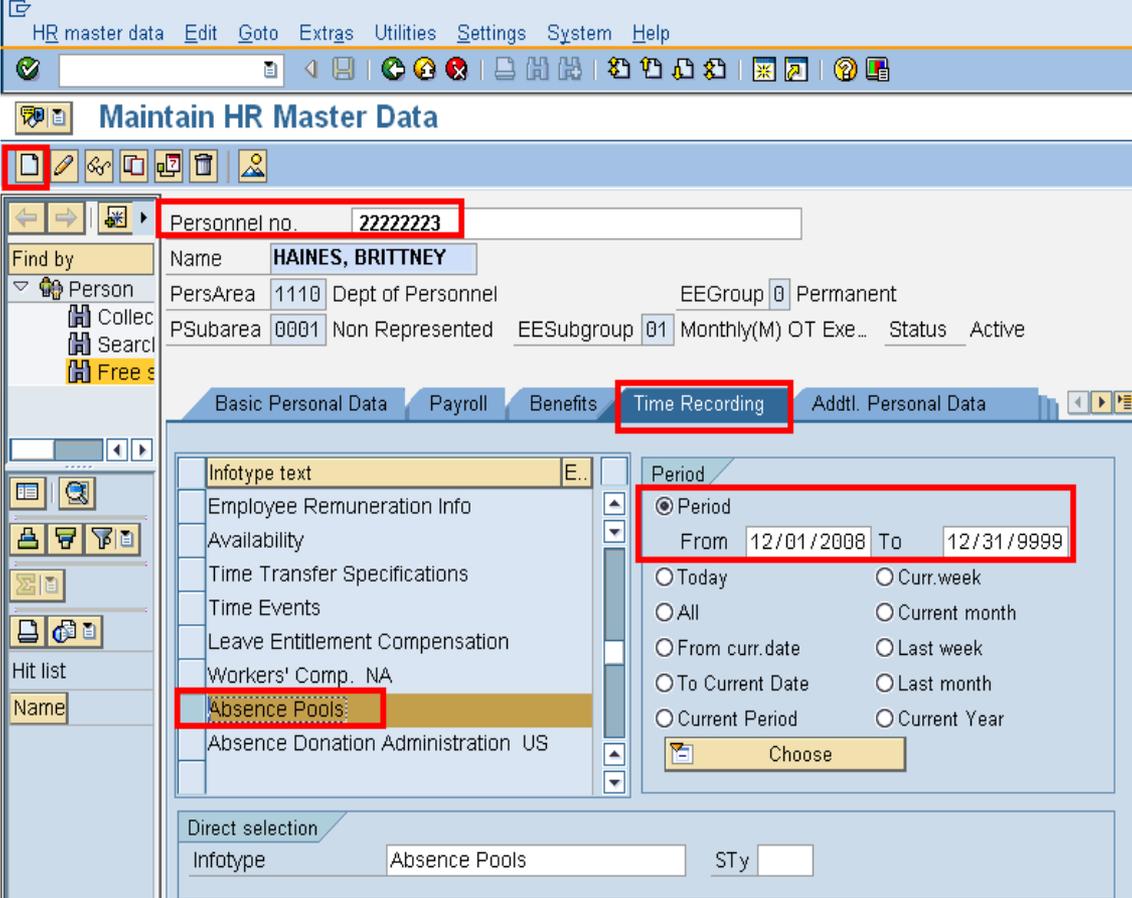
Personnel No	2222223	Name	HAINES, BRITTNEY
EE group	0 Permanent	Personnel ar	1110 Dept of Personnel
EE subgroup	01 Monthly(M) OT Ex...	SSN	555-11-2233 Status Active
Start	12/01/2008	bis	12/31/9999

Absence Pools

Absence Pool ID	0014 Shared Leave - Common Pool
-----------------	---------------------------------

# Sick Leave Pool- Create the Eligibility cont'd.

- Enter the *Personnel no.* and click  (Enter) to validate
- Select the  tab
- Click the gray box to the left of Absence Pools
- Enter the Start Date
- Click  (Create) to create a new record
- Select **Foreign Pool**



The screenshot displays the 'Maintain HR Master Data' application window. The 'Personnel no.' field is set to 22222223. The employee's name is HAINES, BRITTNEY. The 'Time Recording' tab is selected, and the 'Absence Pools' section is highlighted. The 'Period' selection is set to 'From 12/01/2008 To 12/31/9999'.

Field	Value
Personnel no.	22222223
Name	HAINES, BRITTNEY
PersArea	1110
Dept of Personnel	EEGroup 0 Permanent
PSubarea	0001 Non Represented
EESubgroup	01 Monthly(M) OT Exe... Status Active
Infotype	Absence Pools
Period From	12/01/2008
Period To	12/31/9999

# Sick Leave Pool- Create the Eligibility con't.d

- Fields to complete:
  - Pool ID
- Click  (Enter) to validate the information
- Click  (Save) to save

Infotype Edit Goto Extras System Help

Create Absence Pools (0696)

Personnel No	22222223	Name	HAINES, BRITTNEY	
EE group	0 Permanent	Personnel ar	1111	Information Services Division
EE subgroup	01 Monthly(M) OT Ex...	SSN		Status Active
Start	6/03/2008	bis	12/31/9999	

Absence Pools

Absence Pool ID	9000 Sick Leave Pool
-----------------	----------------------

# Sick Leave Pool- Create the Donation

- Select the **Time Recording** tab
- Click the gray box to the left of **Absence Donation Administration US** to select
- Enter the Start date
- Click **Create** (Create) to create a new record
- Select **Donation/Return**

The screenshot shows the 'Maintain HR Master Data' window for personnel number 2222223, HAINES, BRITTNEY. The 'Time Recording' tab is selected. The 'Absence Donation Administration US' infotype is highlighted in the left-hand list. A dialog box titled 'Subtypes for infotype "Absence D' is open, showing a table of subtypes:

STyp	Name
0001	Donation/Return
0002	Withdrawal

# Sick Leave Pool- Create the Donation cont'd.

- Fields to complete:
  - Abs. quota type
  - Number/unit
  - Foreign Pool ID
- Click  (Enter) to validate the information
- Click  (Save) to save

Infotype Edit Goto Extras System Help

Create Absence Donation Administration US(0613)

Personnel No 22222223 Name HAINES, BRITNEY

EE group 0 Permanent Personnel ar 1111 Information Services Division

EE subgroup 01 Monthly(M) OT Ex... SSN Status Active

Start 1/13/2009

Absence Donation Administration US

Abs. quota type	30 Sick Leave ( 283.40000 H...
Number/Unit	75.00 Hours

Home Pool  
 Home Pool ID

Foreign Pool  
 Foreign Pool ID 9000 Sick Leave Pool

Employee  Amount Related  
 Personnel no.  
 Target Abs. quota

External Recipient  
 Ext. Person  
 Absence Quota Type

# Sick Leave Pool- Create the Withdrawal

- Enter the transaction code **PA30**
- Enter the Personnel Number of the Recipient
- Select the **Time Recording** tab
- Click the gray box to the left of **Absence Donation Administration US**
- Enter the start date
- Click **(Create)** to create a new record
- Select **0002 Withdrawal**

The screenshot shows the SAP HR Master Data maintenance interface. The title bar reads "Maintain HR Master Data". The main data area shows the following information:

- Personnel no.: 40000001
- Name: SUMMERS, LARRY
- PersArea: 1111 Information Services Division
- EEGroup: Permanent
- PSubarea: 0002 WMS
- EESubgroup: 01 Monthly(M) OT Exe...
- Status: Active

The "Time Recording" tab is selected. The left-hand list of infotypes includes:

- Infotype text
- Employee Remuneration Info
- Availability
- Time Transfer Specifications
- Time Events
- Leave Entitlement Compensation
- Workers' Comp. NA
- Absence Pools
- Absence Donation Administration US** (highlighted with a red box)

The "Period" section on the right shows:

- Period
- From: 01/13/2009 To: [ ]
- Today
- Curr. week
- All
- Current month
- From curr. date
- Last week
- To Current Date
- Last month
- Current Period
- Current Year

A "Choose" button is located below the period options. At the bottom, the "Direct selection" section shows "Infotype" and "STy" fields.

# Sick Leave Pool- Create the Withdrawal cont'd.

## Fields to complete:

- Abs. quota type
- Number/Unit
- Foreign Pool ID

## Click the Foreign Pool

## Click (Enter) to validate the information

## Click (Save) to save

Infotype Edit Goto Extras System Help

Create Absence Donation Administration US(0613)

Personnel No  Name

EE group  Permanent Personnel ar  Information Services Division

EE subgroup  Monthly(M) OT Ex... SSN  Status

Start

Absence Donation Administration US

Abs.quota type	<input type="text" value="46 Sick Leave Pool"/>
Number/Unit	<input type="text" value="80.00"/> Hours

Home Pool

Home Pool ID

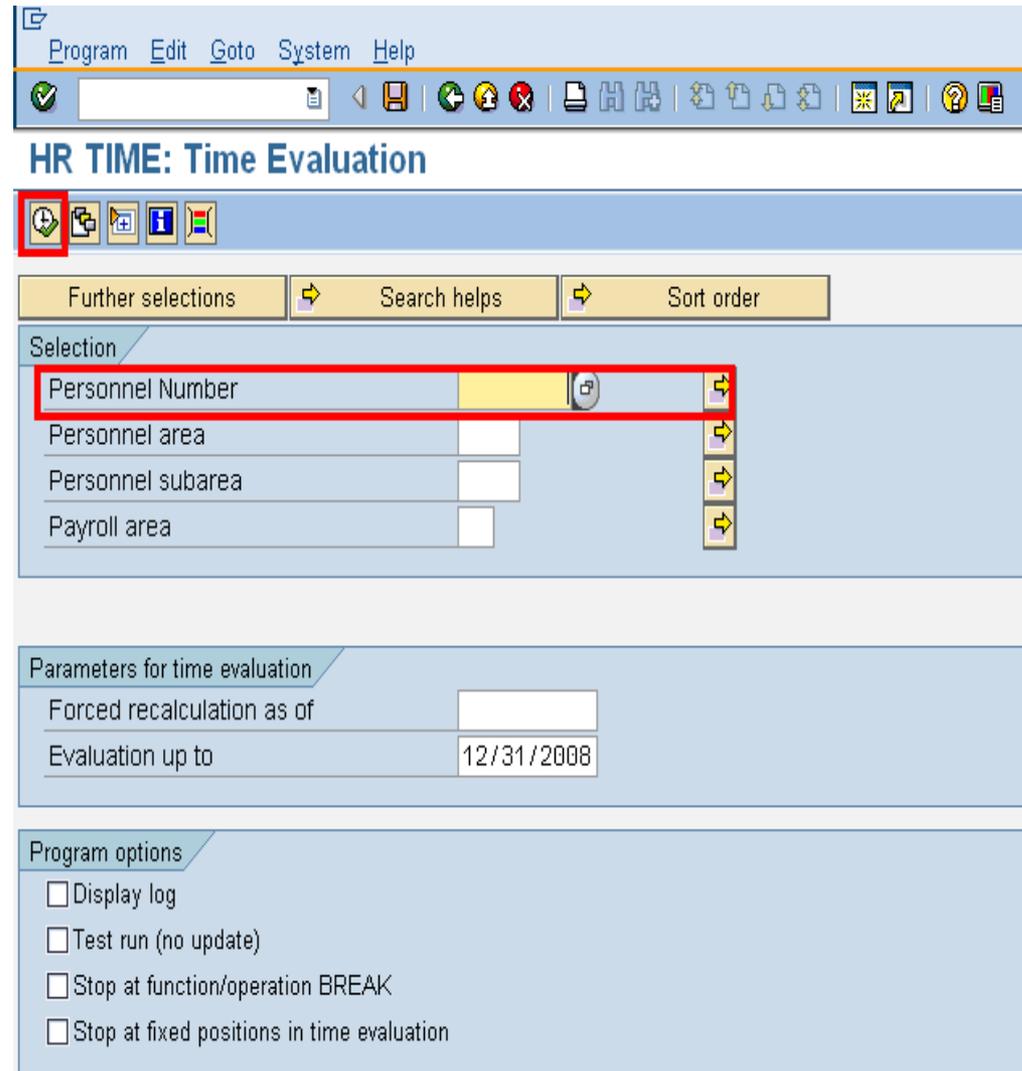
Foreign Pool

Foreign Pool ID

# Sick Leave Pool- Create the Withdrawal

## cont'd.

- Enter the transaction code **/NZT60** in the command field
- Enter the employee's Personnel Number
- Evaluation up to Date – let default to the last day of the month
- Click  (Execute) to execute the process



Program Edit Goto System Help

HR TIME: Time Evaluation

Further selections Search helps Sort order

Selection	
Personnel Number	<input type="text"/> 
Personnel area	<input type="text"/>
Personnel subarea	<input type="text"/>
Payroll area	<input type="text"/>

Parameters for time evaluation

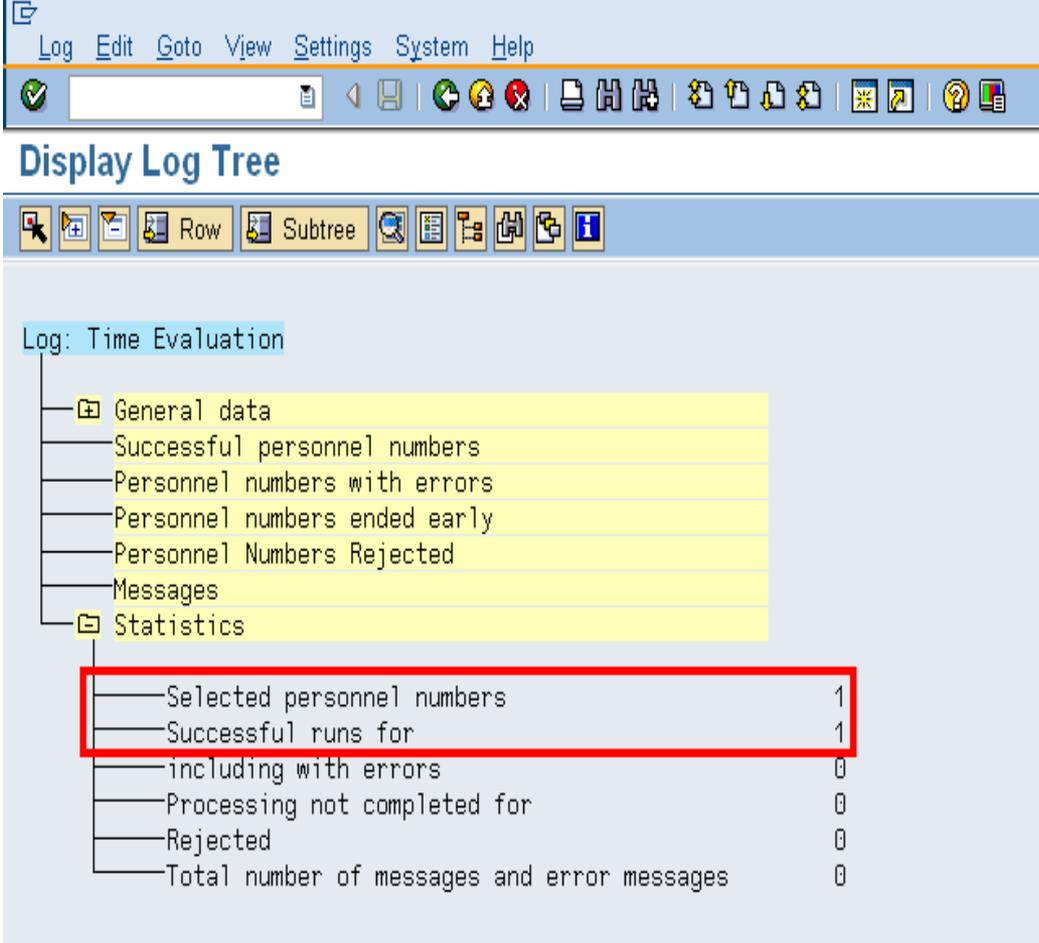
Forced recalculation as of	<input type="text"/>
Evaluation up to	12/31/2008

Program options

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

# Sick Leave Pool- Create the Withdrawal cont'd.

- Verify the time transfer was successful
- Click  (Exit) and return to the SAP Easy Access screen



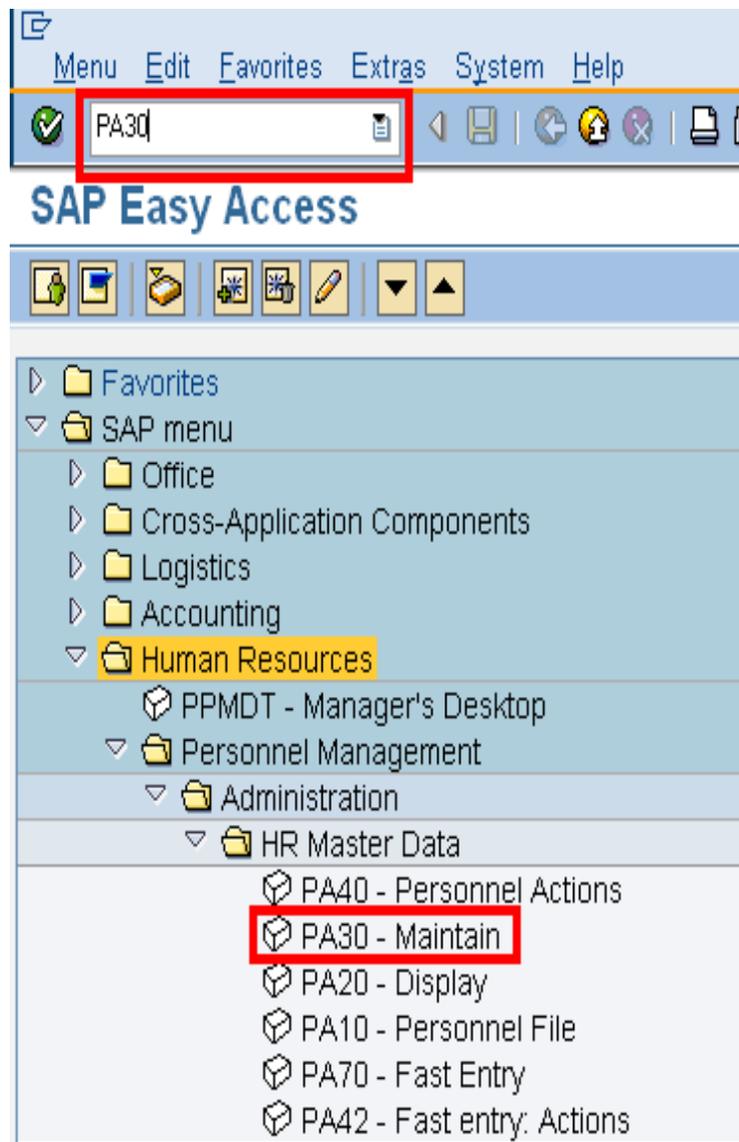
The screenshot shows the SAP 'Display Log Tree' interface. The main window displays a log for 'Time Evaluation'. The 'Statistics' section is expanded, showing a table of results. A red box highlights the first two rows of the statistics table.

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

# Return Unused Shared Leave to the Sick Leave Pool

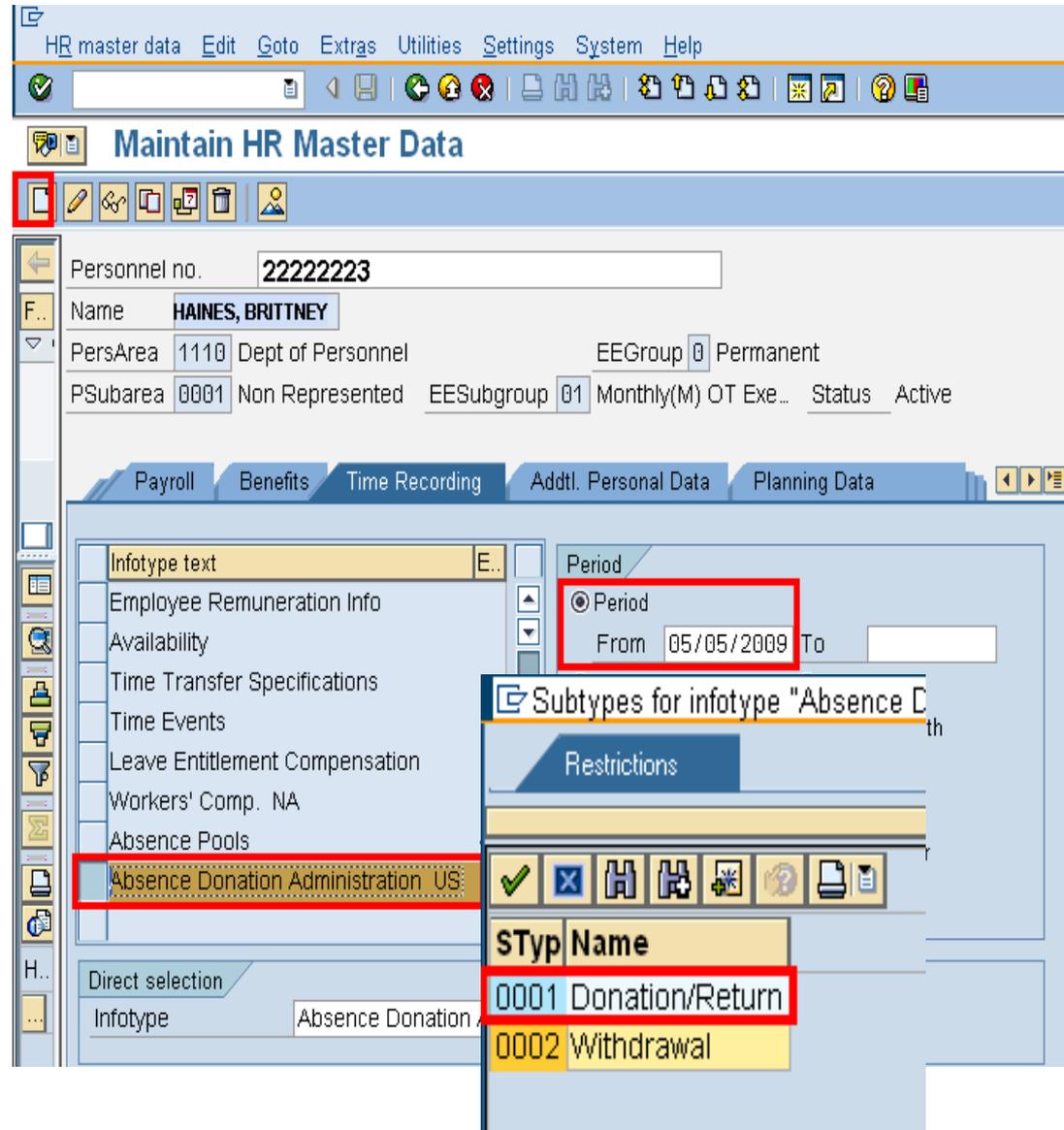
# Return Unused Shared Leave to the Sick Leave Pool

- To return unused shared leave, follow the menu path:  
Human Resources → Personnel Management → Administration → HR Master Data → Maintain
- You can also use the transaction code **PA30** (Maintain HR Master data)



# Return Unused Shared Leave to the donor cont'd.

- Enter *Personnel no.* of the recipient
- Click the  Time Recording tab
- Enter the from date
- Click the gray box to the left  Absence Donation Administration US
- Click  (Create) to create and continue



The screenshot shows the 'Maintain HR Master Data' application window. The 'Time Recording' tab is selected. The 'Personnel no.' field contains '22222223'. The employee's name is 'HAINES, BRITTNEY'. The 'Absence Pools' list includes 'Absence Donation Administration US', which is highlighted with a red box. A subtypes list for this pool is displayed, showing '0001 Donation/Return' and '0002 Withdrawal', with '0001 Donation/Return' also highlighted in red. The 'Period' field shows 'From 05/05/2009'.

HR master data Edit Goto Extras Utilities Settings System Help

Maintain HR Master Data

Personnel no. 22222223

Name HAINES, BRITTNEY

PersArea 1110 Dept of Personnel EGroup 0 Permanent

PSubarea 0001 Non Represented ESubgroup 01 Monthly(M) OT Exe... Status Active

Payroll Benefits Time Recording Addtl. Personal Data Planning Data

Infotype text E..

Employee Remuneration Info

Availability

Time Transfer Specifications

Time Events

Leave Entitlement Compensation

Workers' Comp. NA

Absence Pools

Absence Donation Administration US

Period

Period

From 05/05/2009 To

Subtypes for infotype "Absence C

Restrictions

STyp Name

0001 Donation/Return

0002 Withdrawal

# Return Unused Shared Leave to the Sick Leave Pool cont'd.

## ■ Fields to complete:

- *Abs. quota type*
- *Number/Unit*
- *Select Foreign Pool ID*
- *Click Foreign Pool Radio button*

■ Click  (Enter) to validate

■ Click  (Save) to save

Infotype Edit Goto Extras System Help

Create Absence Donation Administration US(0613)

Personnel No 424880 Name SHEA KATHLEEN ANN

EE group 0 Permanent Personnel ar 1111 Information Services Division

EE subgroup 01 Monthly(M) OT Ex... SSN 537-66-8057 Status Active

Start 05/05/2009

Absence Donation Administration US

Abs.quota type 30 Sick Leave ( 283.40000 H..

Number/Unit 45.00 Hours

Home Pool

Home Pool ID

Foreign Pool

Foreign Pool ID 9000 Sick Leave Pool

Employee  Amount Related

Personnel no.

Target Abs. quota

External Recipient

Ext. Person

Absence Quota Type

# Uniformed Service Pool

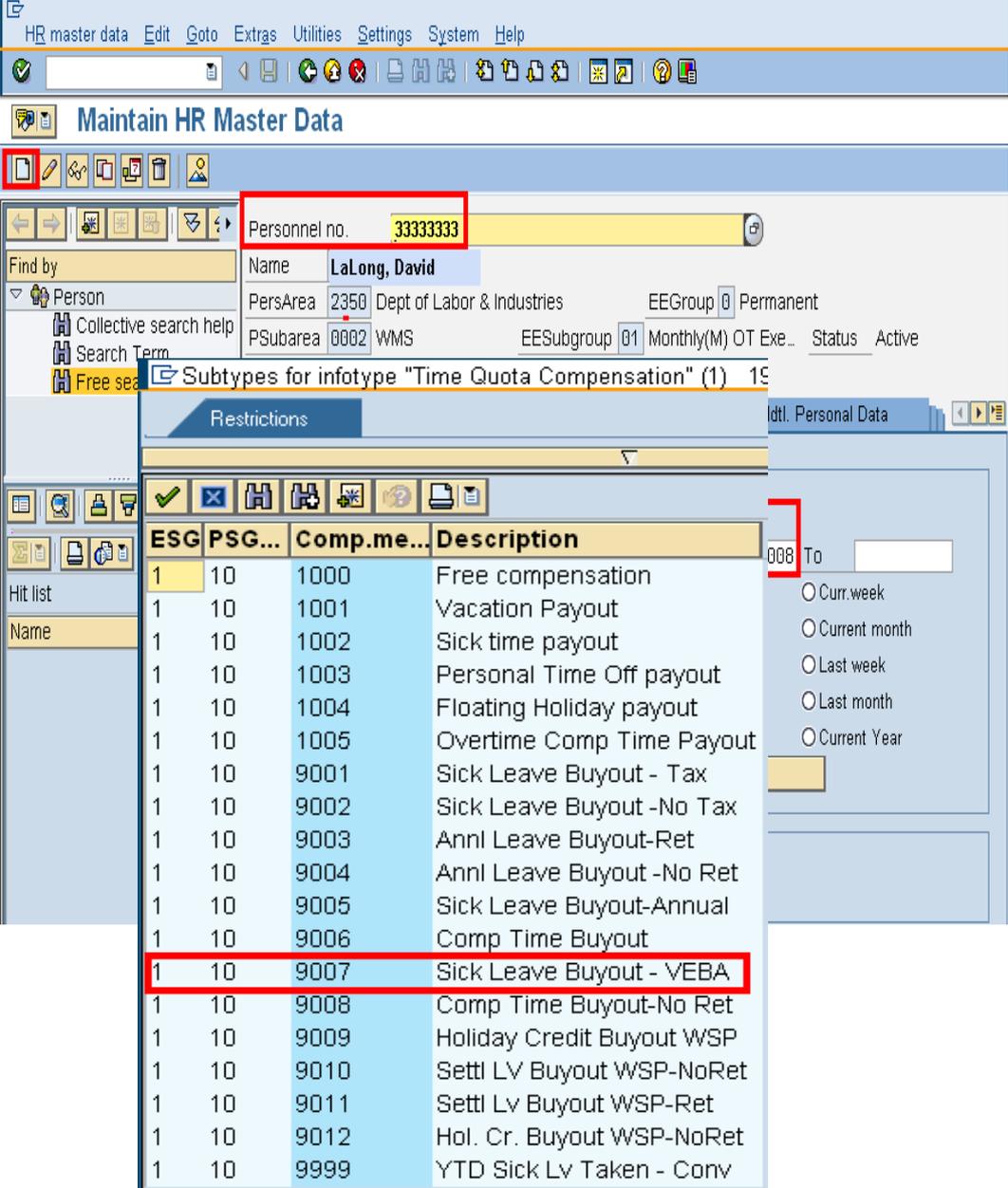
# Uniformed Service Pool Overview

- The Uniformed Service Shared Leave pool was created to allow active state employees who are called into active duty the ability to maintain a level of compensation and employee benefits.
- This pool allows for state employees to donate their leave that may be used by an employee who has been called into active duty.
- Refer to the user procedure [Shared Leave- Uniform Srvs Pool – Create the Eligibility](#) and [Shared Leave – Uniform Srvs Pool- Donation or Withdrawal](#) on the OLQR

# VEBA Buyout

# VEBA Buyout

- Enter the transaction code **PA30**
- Enter *Personnel No.*
- Click the  Time Recording tab
- Enter the start date
- Click the gray box to the left of  Time Quota Compensation to select
- Click  (Create)
- Select **Sick Leave Buyout-VEBA**



The screenshot shows the 'Maintain HR Master Data' window. The 'Personnel no.' field is set to 33333333. The 'Name' field is 'LaLong, David'. The 'PersArea' is 2350 and the 'PSubarea' is 0002. The 'Subtypes for infotype "Time Quota Compensation" (1)' list is displayed, with the following table:

ESG	PSG...	Comp.me...	Description
1	10	1000	Free compensation
1	10	1001	Vacation Payout
1	10	1002	Sick time payout
1	10	1003	Personal Time Off payout
1	10	1004	Floating Holiday payout
1	10	1005	Overtime Comp Time Payout
1	10	9001	Sick Leave Buyout - Tax
1	10	9002	Sick Leave Buyout -No Tax
1	10	9003	Annl Leave Buyout-Ret
1	10	9004	Annl Leave Buyout -No Ret
1	10	9005	Sick Leave Buyout-Annual
1	10	9006	Comp Time Buyout
1	10	9007	Sick Leave Buyout - VEBA
1	10	9008	Comp Time Buyout-No Ret
1	10	9009	Holiday Credit Buyout WSP
1	10	9010	Settl LV Buyout WSP-NoRet
1	10	9011	Settl Lv Buyout WSP-Ret
1	10	9012	Hol. Cr. Buyout WSP-NoRet
1	10	9999	YTD Sick Lv Taken - Conv

The row for 'Sick Leave Buyout - VEBA' (ESG 1, PSG 10, Comp.me 9007) is highlighted with a red box. To the right of the table, there is a 'Restrictions' section with a 'To' field set to 008 and several radio button options: 'Curr.week', 'Current month', 'Last week', 'Last month', and 'Current Year'.

# VEBA Buyout

- Enter the buyout hours in *No. to compensate* field
- Ensure the accurate Start Date has been entered
- Click  (Enter) to validate
- Click  (Save) to save

Infotype Edit Goto Extras System Help

Create Time Quota Compensation (0416)

Compensate

Personnel No. **33333333** Name **LALONG, DAVID**

F.. PersArea **2250** Washington State Patrol EEGroup **0** Permanent

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

Start **06/18/2008**

Comp. method **9007** Sick Leave Buyout - VEBA

Compensation specifications

Time quota type **30** Sick Leave

Compensation rule **000**

No. to compensate **175.00000**

Do not account

Absence quotas

ATy	Quota text	Entitl.	Unit	Comp.	Rem.	WT	Amount	Curr...	<input type="checkbox"/>	Deduction fr...	Deduction to	<input type="checkbox"/>
	30 Sick Leave	8.00000	Hours	0.00000	0.50000		0.00		<input type="checkbox"/>	05/16/2006	12/31/9999	<input type="checkbox"/>
	30 Sick Leave	8.00000	Hours	0.00000	8.00000		0.00		<input type="checkbox"/>	06/16/2006	12/31/9999	<input type="checkbox"/>
H..	30 Sick Leave	8.00000	Hours	0.00000	8.00000		0.00		<input type="checkbox"/>	07/16/2006	12/31/9999	<input type="checkbox"/>
	30 Sick Leave	8.00000	Hours	0.00000	8.00000		0.00		<input type="checkbox"/>	08/16/2006	12/31/9999	<input type="checkbox"/>