OSC TRAINING

PA370

Short-Term Disability

TRAINING COURSE

State of North Carolina

Office of the State Controller

June 6, 2016

For assistance with any TRAINING needs, contact:

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Introduction

Overview

Welcome to the *Short-Term Disability* training course. The Personnel Administration (PA) module is used to enter and maintain employees in the OSC HR/Payroll system.

The course introduction is an opportunity to get to know the others who are attending class as well as to agree on classroom courtesy. The instructor will inform you about the building facilities and when breaks will occur.

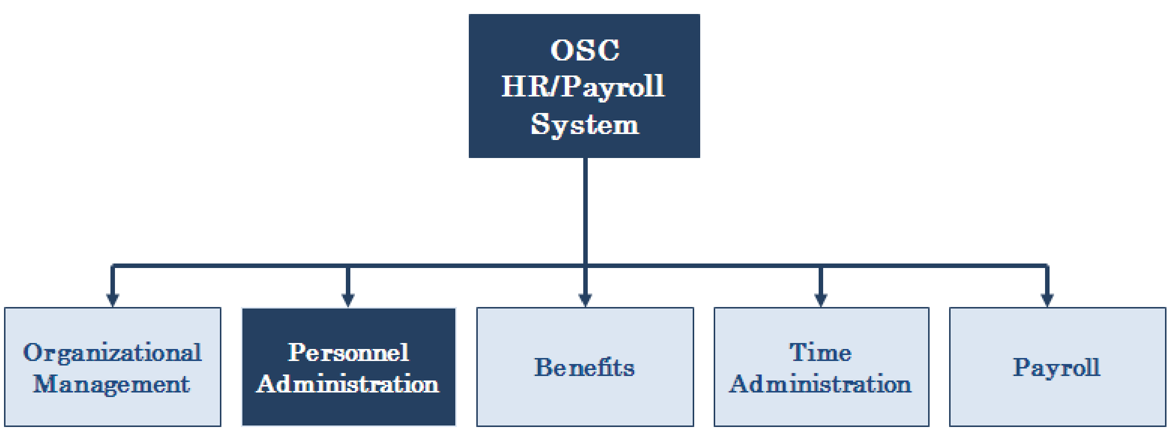
Prerequisites

- PA210 - Personnel Administration Terms, Concepts, and Display Data

There is one prerequisite you must take before attending this course. Attending this prerequisite ensures that you are adequately prepared with the new processes, concepts, and terms that are needed for successful completion of the *Short-Term Disability* course.

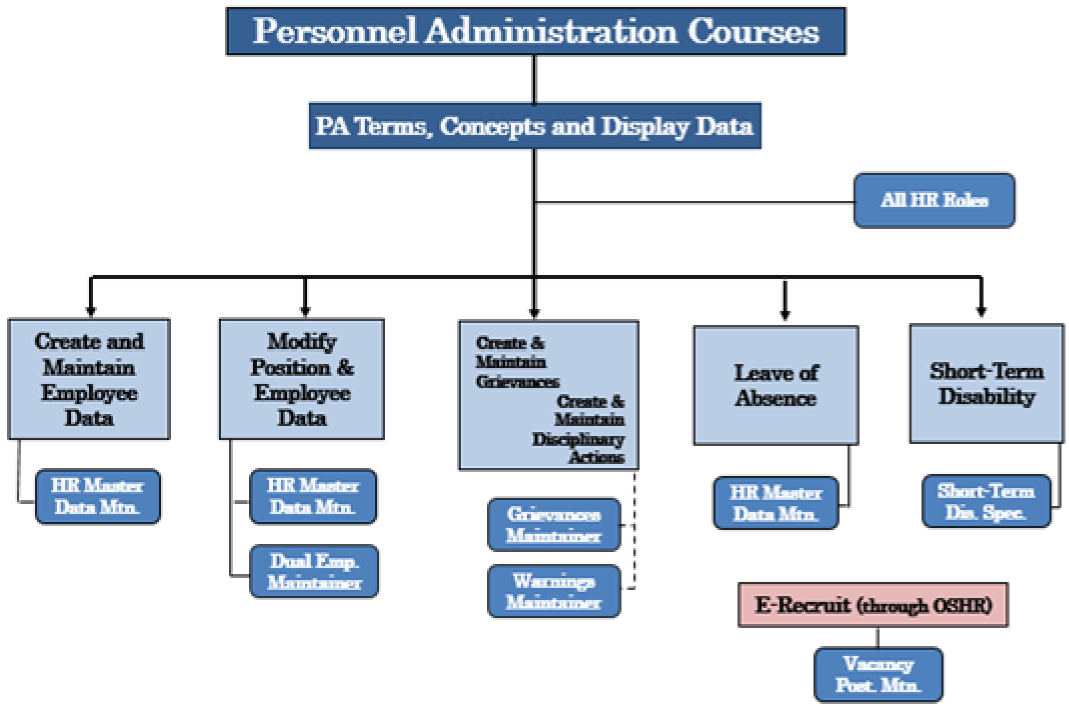
PA210 can be taken either virtually or through an instructor-led classroom.

OSC HR/Payroll Training Curriculum



The OSC HR/Payroll training program comprises several courses and different modules. Based on your HR role, you will attend courses in the *Personnel Administration* module.

PA Curriculum by Security Role



Within the Personnel Administration module, there are several courses. Your position/security roles determine which courses you may be required to attend.

Strategy for Training

<u>Tell Me (Concepts)</u>

- Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN

<u>Show Me (Demonstrations)</u>

- Instructor will demonstrate job-related tasks performed in the OSC HR/Payroll system – HANDS OFF.

<u>Let Me (Exercises)</u>

- Student will complete the exercises which allows for hands-on practice in class – HANDS ON

<u>Support Me (Availability)</u>

- Instructor will be available to answer questions while the students complete the exercises

Course Map

You can see the Course Map of the class at the beginning of each lesson. The bolded and larger text indicates which lesson you are beginning.

The lessons covered in this class include:

- Lesson 1: Leave of Absence Overview
- Lesson 2: STD 60-Day Waiting Period
- Lesson 3: STD After 60-Day Waiting Period
- Lesson 4: Benefits
- Lesson 5: IT2010 Process
- Lesson 6: Course Review

The *Short-Term Disability* Student Guide can be used as a reference when you return to the workplace. For example, you can use the exercises for practicing in the HR/Payroll system training environment.

You may also find it useful to take the Employee Self-Service and Manager Self-Service courses although they are not required for the PA curriculum. They are, however, mandatory for other requirements.

Course Objectives

Upon completion of this course, you should be able to:

- Define key Short-Term Disability (STD) terms and concepts
- Describe the Short-Term Disability process
- View, create and maintain a Leave of Absence for Short-Term Disability

Reference Materials

- Student Guide
- Training HELP website
  - Quick Reference Guides
    - PA Basics QRG
    - HR/Payroll Basics Quick Reference Guide
  - Business Process Procedures (BPPs)
    - Work instructions
  - Job Aids

SUMMARY

This course is intended to give HR professionals an understanding of the HR/Payroll system Personnel Administration module. This course will provide you with demonstration and practice for creating and modifying the Short-Term disability process for employees.

Leave of Absence Overview

Lesson 1 Objectives

In this lesson we will learn to:

- Identify the applicable Action to use for Short-Term Disability
- Determine the appropriate STD reasons for a Leave of Absence (LOA) Action
- Identify the infotypes associated with Short-Term Disability
- Describe the Workflow process
- Explain specific infotypes related to work schedules and absences

Disability Terms and Definitions

The following terms pertain to Leave of Absence – Short-Term Disability:

- Short -Term Disability
- Contract Field
- Work Schedule Rule (WSR)
- Absences
- Time Quota Compensation

Short-Term Disability -- eligible employees who are unable to perform their regular work duties because of a disability lasting up to a maximum of 365 days.

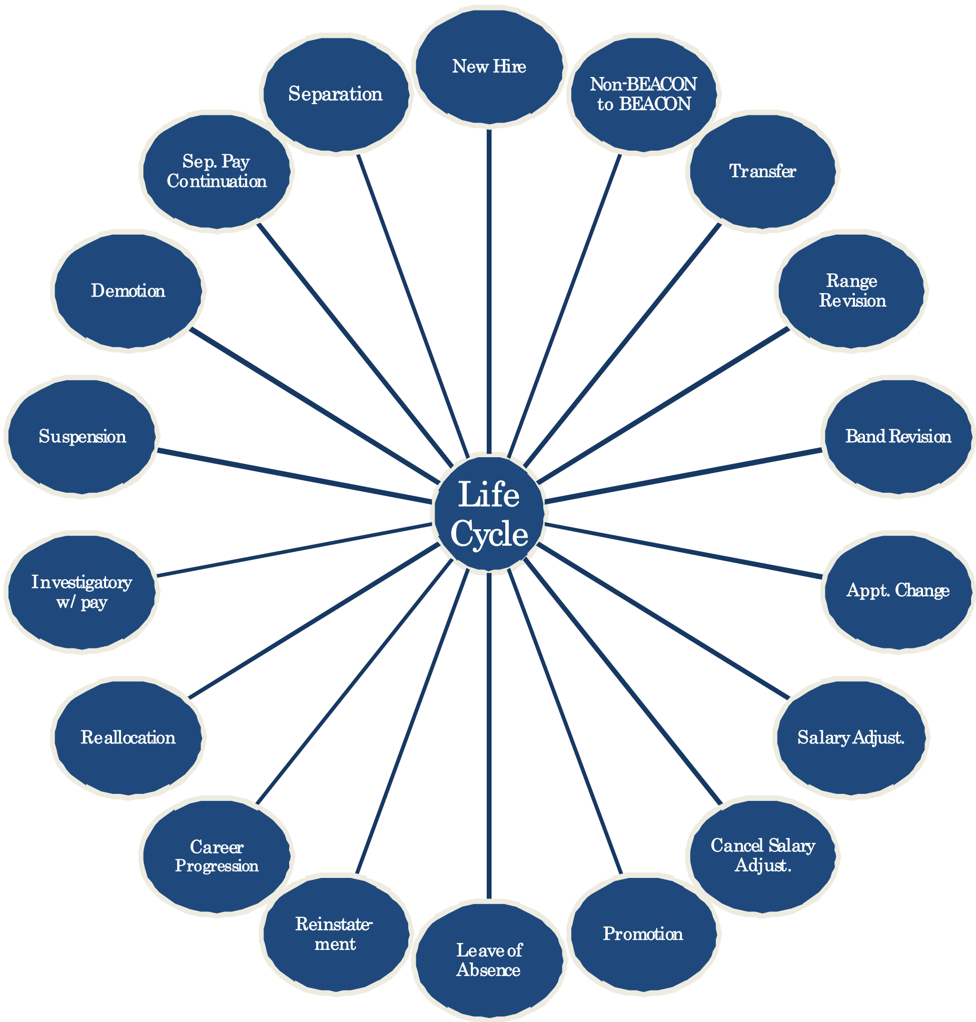
Contract Field -- used to further classify employees (retiree, Medicare, etc.). When an employee is LOA – Short-Term disability and not using leave, this field is used to indicate whether or not the employee's health insurance will be partially paid by the State or completely paid by the employee. Employees with less than 5 years of creditable service must pay both the employee and employer cost.

Work Schedule Rule (WSR) -- the foundation upon which an employee's time is processed in the OSC HR/Payroll system. Full-time employees are assigned a 5 X 8 work schedule (part-time assigned to applicable schedule). Both full-time and part-time employees are changed to positive time.

Absences - times when employees are not at work or on paid leave. Employees are absent if their planned working time, as stipulated in their work schedules, is not fully worked or if the employee is not exhausting leave.

Time Quota Compensation - Allows the financial remuneration of absence entitlements (that have not already been deducted). For example, the employee is on Leave of Absence and using sick leave.

Actions



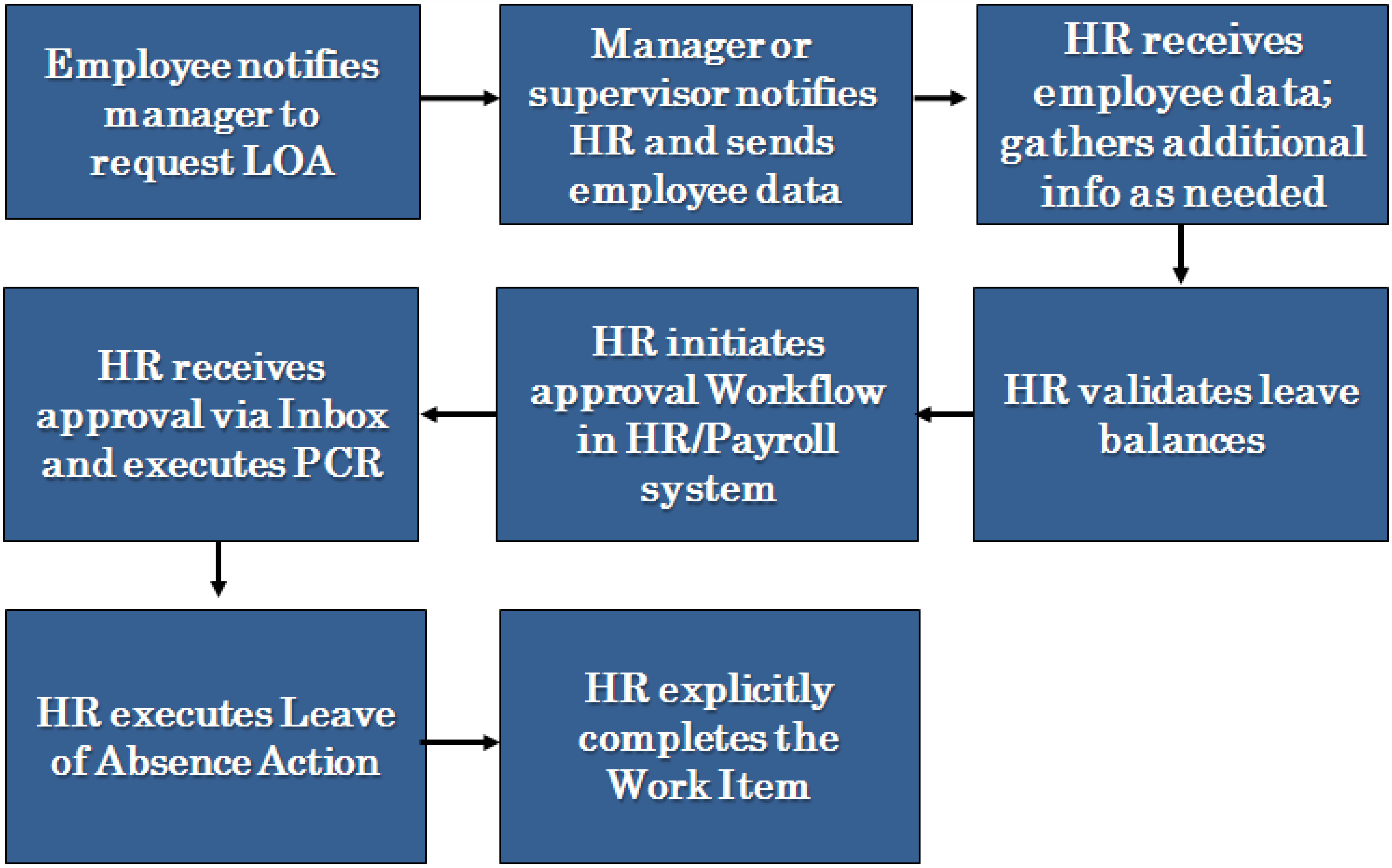
As discussed in the *PA Terms, Concepts and Display Data* course, the life cycle of an employee comprises many different events. The OSC HR/Payroll system defines those events as a specific infotype called **Actions** (IT0000). Actions for the State of North Carolina are shown above.

An Action combines logically related infotypes into one infogroup. The infotypes in the infogroup are sequentially arranged and automatically display. This helps to simplify the data entry for the Action. You don't have to remember whether a particular infotype should be included—the OSC HR/Payroll system automatically includes the infotypes that are associated with a particular Action. Depending upon the employee's specific data, you may not need to enter data on each of the infotypes presented in the Action.

Each Action has one or more reasons that are associated with the life cycle event. When you create an Action in the HR/Payroll system you determine and select the appropriate reason for the employee's life cycle event.

With the Actions infotype (IT0000) you can display an overview of all the important changes related to an employee, and you can thus document the most important stages an employee passes through in his or her history with the State.

Leave of Absence (LOA)



There is only one Leave of Absence in the OSC HR/Payroll system. That one action is used for both leave with pay and without pay. The combination of the Action/reason and data entered on the infotypes indicate to the OSC HR/Payroll system whether to pay the employee or not. Review the above diagram for a brief overview of the LOA process.

You will note that, because LOA is an Action, it must be created via ZPAA076 Workflow. You can also see that prior to initiating Workflow, the employee notifies the manager, manager sends paperwork to HR, and HR works with Leave Administrator to ensure that leave balances are accurate and up-to-date. In addition, agencies are responsible for notifying employees when STD is pending between extended and long-term. Agencies will notify the State Retirement system of reimbursable amounts for the second six months of STD.

You may have to initiate one or more LOA Actions in order to record the employee's leave.

Additional Resource
You can find several additional support materials about LOA - Short-Term Disability on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/index.html Follow the following path to access the latest version of the job aids: *Personnel Administration > BPPs* • LOA - Short-Term Disability *Personnel Administration > Job Aids* • LOA Requirements • PA Actions/Reasons/Definitions Job Aid • LOA Checklist - STD

Short-Term Disability Action/Reasons

As noted previously, the Leave of Absence (LOA) Action is used to place an employee on Short-Term Disability. The applicable reason is selected based on various factors as indicated below. To properly track Short-Term Disability, you will probably have to use more than one Action with the applicable date and reason.

STD 60-Day Waiting Period – used to track the Waiting Period (WP). The employee may or may not choose to exhaust leave while on 60-day WP.

STD Regular - employee has either no leave left to exhaust or does not wish to exhaust leave while out on STD. This reason is used on the 61st day if not using leave.

STD (Leave) – employee is exhausting leave that will be paid out over a period of time (rather than one-time lump sum) while out. This Action is used on day 61 and can extend as long as the employee has applicable leave to use.

STD (Lump Sum) - employee is given a one-time lump sum payout of leave rather than exhausting leave over a period of time while out.

STD Extended - additional leave, up to 365 days after the last day of short-term disability benefit. STD Extended is used for a longer disability that is likely to be temporary.

NOTE: The LOA Action does not designate whether the leave is paid or unpaid. The combination of the Action, reason, and use of the Planned Work Schedule and Absences infotypes (discussed later) determine whether or not the employee will be paid while out.

Workflow

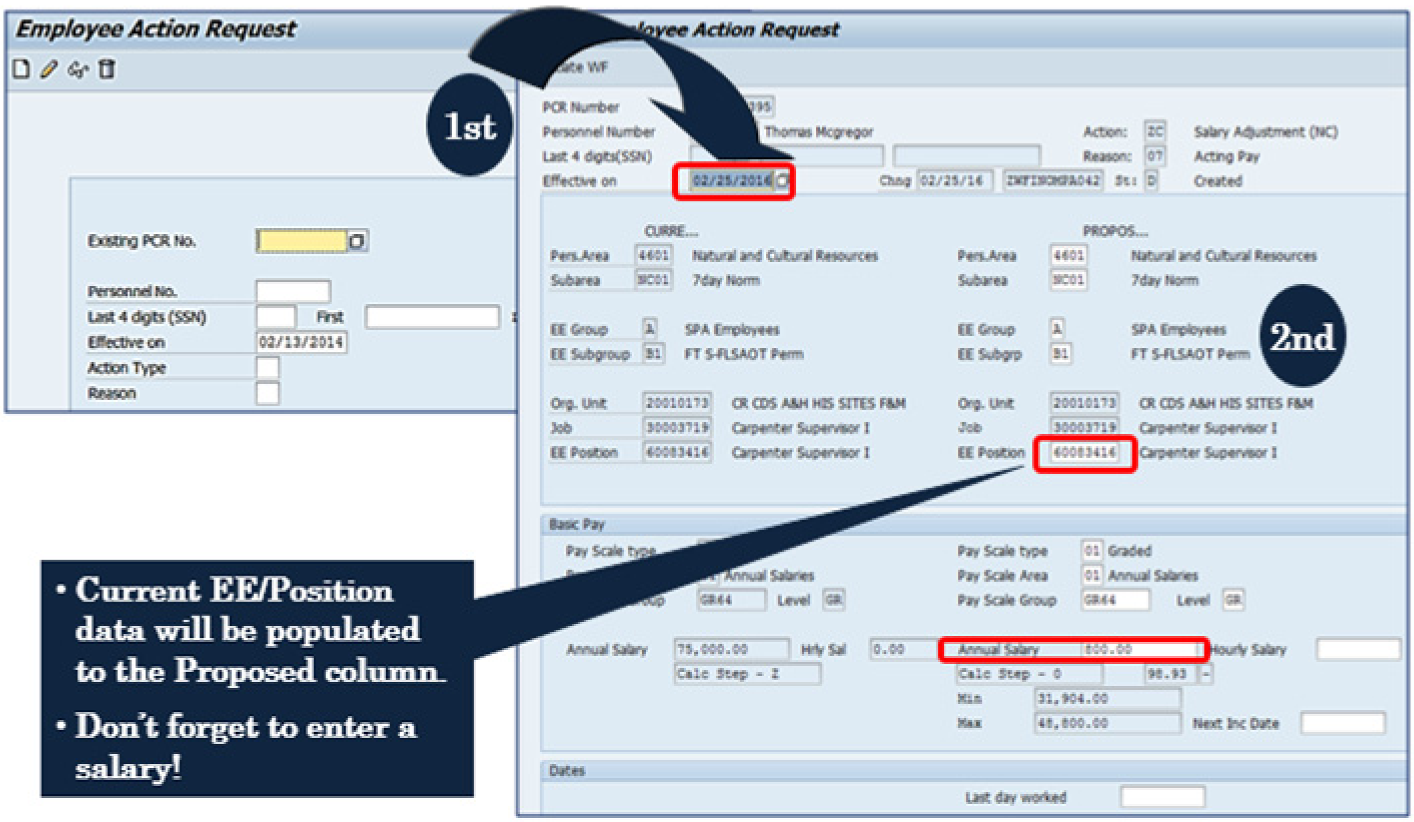
LOA is used to track various activities regarding an employee's leave of absence. As a result, you may need to make more than one entry for the Action (along with the associated reason) when an employee is on LOA (refer to the LOA-Short Term Disability BPP online at the OSC Training HELP website). In the OSC HR/Payroll system you will now have a complete history of the activity for a particular LOA (because of the various entries). Comments can be entered during the Action on many of the infotypes (for example IT0000, IT0019, IT2001). Also, you can run reports based on reasons.

Leave of Absence is an Action. All PA Actions need approval before the Action can be executed. The OSC HR/Payroll system Workflow enables approvals (or rejections) to be obtained electronically. In your agency, you may already have a manual process in place. Workflow does not eliminate that process entirely, however, it may duplicate a portion of your manual process. You must provide documentation to the Approver to assist them in their approval decision. In the OSC HR/Payroll system, you can attach documents to the workflow as well as write notes.

The authority to approve an Action is associated to the Position, and not to the person and person's role. If a person leaves an Approver Position, the authority to approve stays with the Position. A person who is subsequently assigned to that Position, also assumes the approval authority (unless the Position is changed by Security). Certain Division and/or Agency Positions are Approver Positions for Actions.

NOTE: All roles that require training are delimited when the position becomes vacant. The agency Data Owner requests security when the position is filled.

ZPAA076 Workflow



Use Transaction code **ZPAA076** to *initiate* the OSC HR/Payroll system electronic approval process, referred to as Workflow (WF).

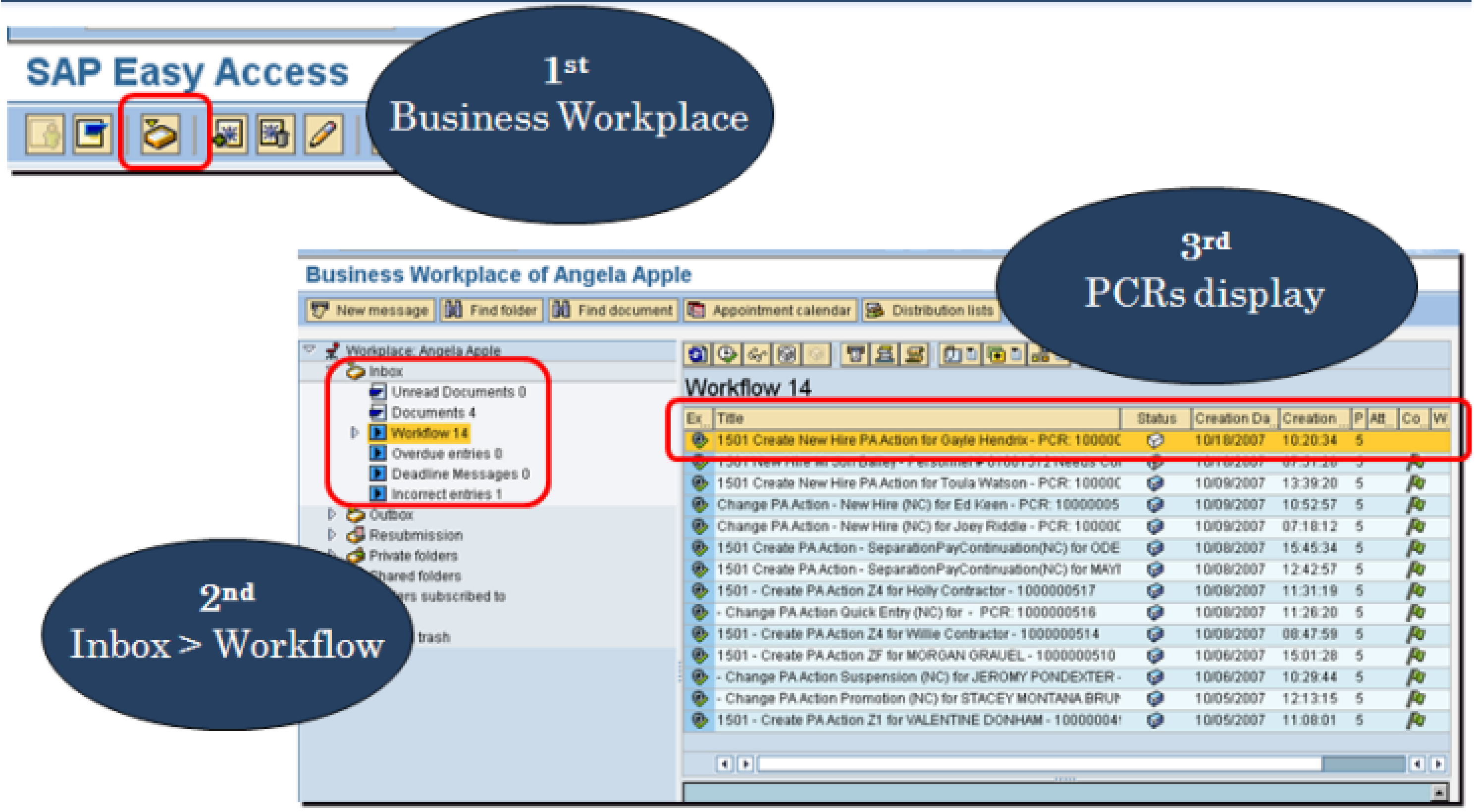
On the initial *Employee Action Request* screen you will enter the applicable data. After you select or enter the Action type and reason, the second *Employee Action Request* screen is displayed. This screen has two columns. On the left you can view the **Current** status of the employee. On the right, the **Proposed** column, you enter only the salary for the Action.

When you save and initiate Workflow, you will receive a **Personnel Change Request (PCR)** number. A best practice is to write the PCR number on your paperwork so that you can track it for future use.

If the WF does not change the employee's salary, you still must enter his or her current salary in the salary field.

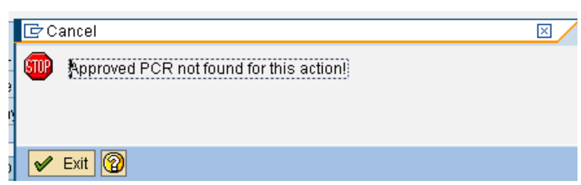
After you complete the data entry and click Initiate WF, the system sends the request to the appropriate Approver. There may be more than one level of approval in the process. Any Approver that is part of the process can approve or reject the request.

Inbox



The second part of the Workflow is to process your Workflow item when it has been approved (or to see if it was rejected). You will go into the SAP Business Workplace from the Easy Access screen.

From the Business Workplace screen, click **Inbox > Workflow**. All of the PCRs that you have initiated and which have either been approved or rejected are listed on the right. Double-click the approved PCR and the applicable screen is automatically displayed for the Action.



After you have an approved PCR and you are ready to execute the Action for the employee, you must be sure to enter the same date on the Personnel Actions screen as you entered on the Workflow. If you enter a different date on the Personnel Actions screen, you will receive a message that the approved PCR is not found. You will also receive this message if you attempt to bypass ZPAA076.

LOA Infotypes

As indicated previously, when you create an Action such as LOA, the OSC HR/Payroll system presents the applicable infotypes. The LOA infotypes for the Short Term Disability reason are described below. You may or may not enter data in all of them, depending upon the circumstances of the specific Short-Term Disability leave you are processing.

Actions (0000) – This infotype indicates the events that occurred on the employee's personnel record. The infotype shows the employment status. Time, Payroll and Benefits use information from IT0000. The information on this infotype should pre-populate based on the data you entered when initiating ZPAA076.

Organizational Assignment (0001) – All of the fields on this infotype default from the position assigned to the employee. Use the Contract field to indicate whether or not the employee has fewer than 5 years of service for retirement. This determines if the health insurance will be paid partially by the State or solely by the employee. For STD LOA, if the employee has five or more years of service for retirement, leave the field blank.

Monitoring of Tasks (0019) – Use this infotype to create reminders to follow-up with the employee at specified dates. Select an applicable task type and enter a date that a task is due. To keep track of the various tasks, run either the Date Monitoring report (S_PH0_48000450 in the OSC HR/Payroll system or B0099 in BOBJ -Employee Deadline Dates) to view the various tasks due for a week. If the task is completed prior to the due date, it will still display on the reports unless you delimit the Monitoring of Tasks infotype.

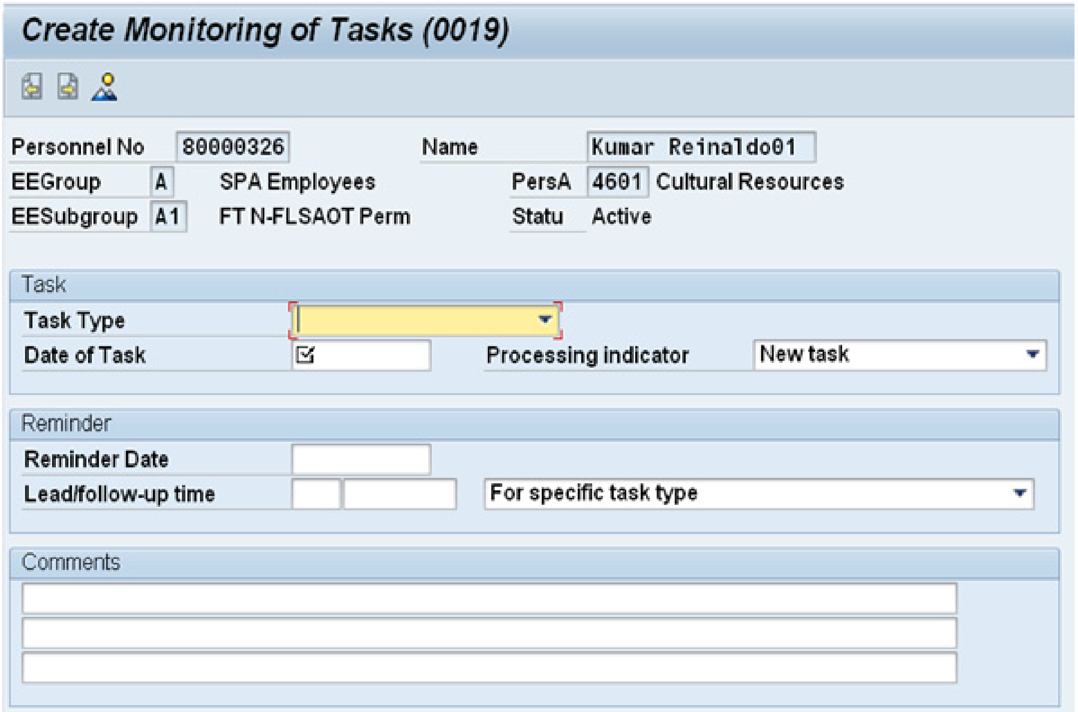
Objects on Loan (0040) – Either skip or delimit depending upon whether or not (1) your agency uses this infotype (2) your agency requires employees to return items while out on leave, or (3) the employee returned items if required to do so.

Planned Working Time (0007) – All full-time employees must be on a 5-day 8-hour per day work schedule. The easiest way to accomplish this is to use D01N08GN. Part-time employees can be kept on their applicable part-time schedule. A*ll employees*, whether full-time or part-time, <u>must</u> be positive time recording.

Absences (2001) - use to indicate the number of leave hours the employee wants to exhaust for leave or LWOP.

Time Quota (0416) – use only if employee requests a one-time lump sum leave payout.

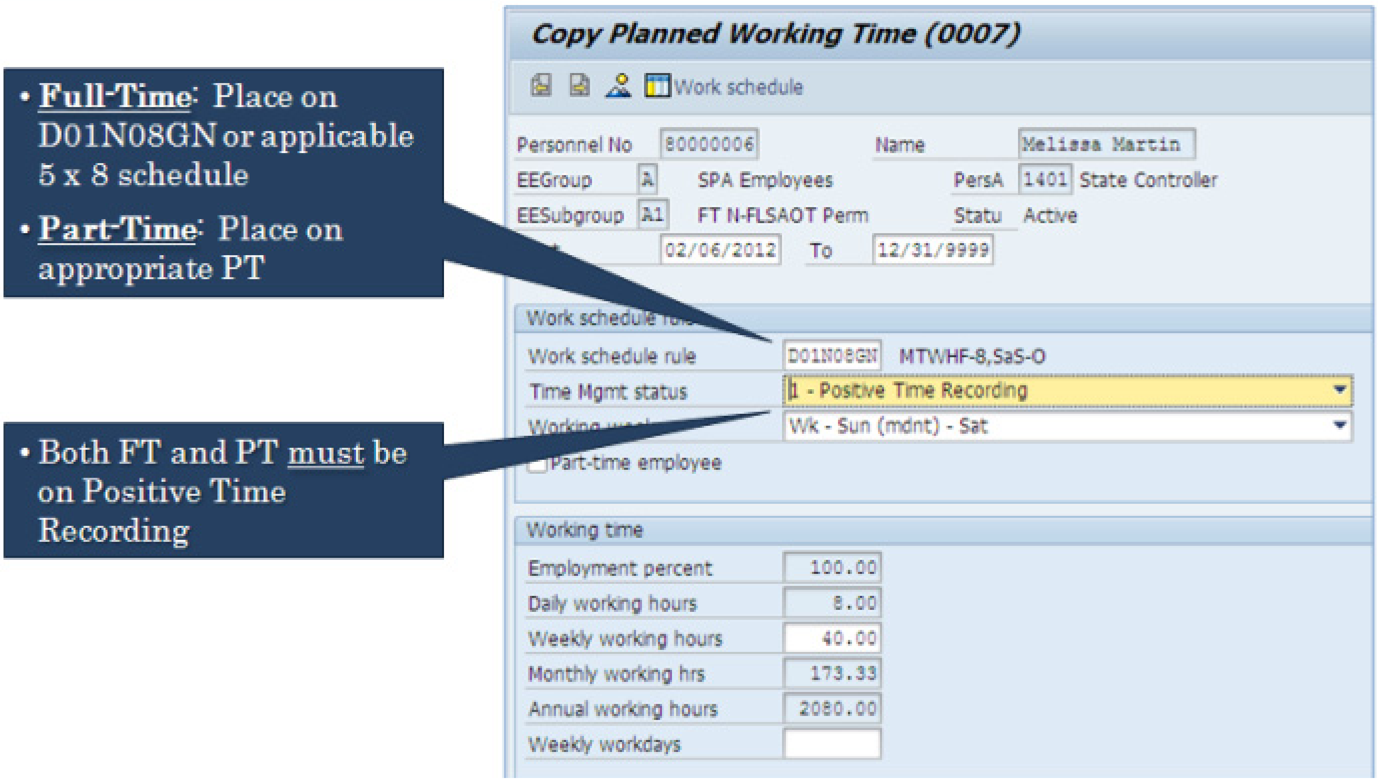
Monitoring of Tasks (IT0019)



This infotype is like a tickler file and is date-driven. Select an applicable task type and enter a date that a task is due.

To keep track of the various tasks, run either the Date Monitoring report (S_PH0_48000450 in the OSC HR/Payroll system or B0099 in BOBJ - Employee Deadline Dates) to view the various tasks due for a week. If the task is completed prior to the due date, it will still display on the reports unless you delimit the Monitoring of Tasks infotype.

Planned Working Time Infotype



> IMPORTANT: All full-time employees must be on a 5-day 8-hour per day work schedule. The easiest way to accomplish this is to use D01N08GN. All employees, whether full-time or part-time, must be positive time recording.

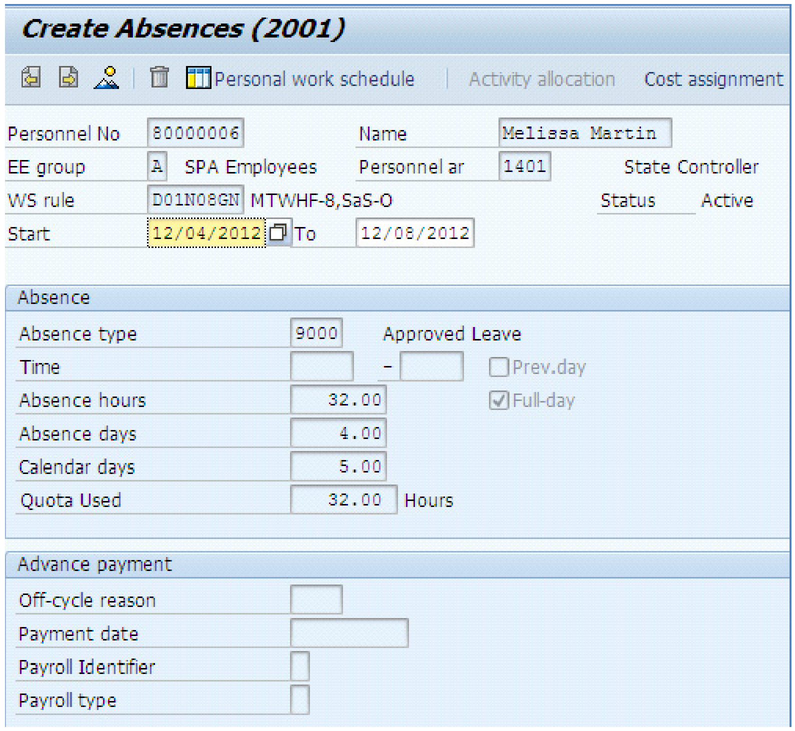
For part-time employees, select an equivalent work schedule M-F.

Example – PT EE 36 hrs; equivalent schedule would be 5 x 7.2 = WSR DD9N1001.

A 28-day employee will remain on the 28-day working week as long as they are exhausting leave. The working week should be changed to the normal agency specific working week on the 1st day they use LWOP. The work schedule rule is still changed to D01N08GN.

🗁 BEST PRACTICE: When working on the Absences infotype, click the **green check Enter** button rather than the Enter key on your keyboard. This lets you allow the infotype's "calculator" to function until you have identified the date range necessary to match the number of leave hours you need to use.

Absences



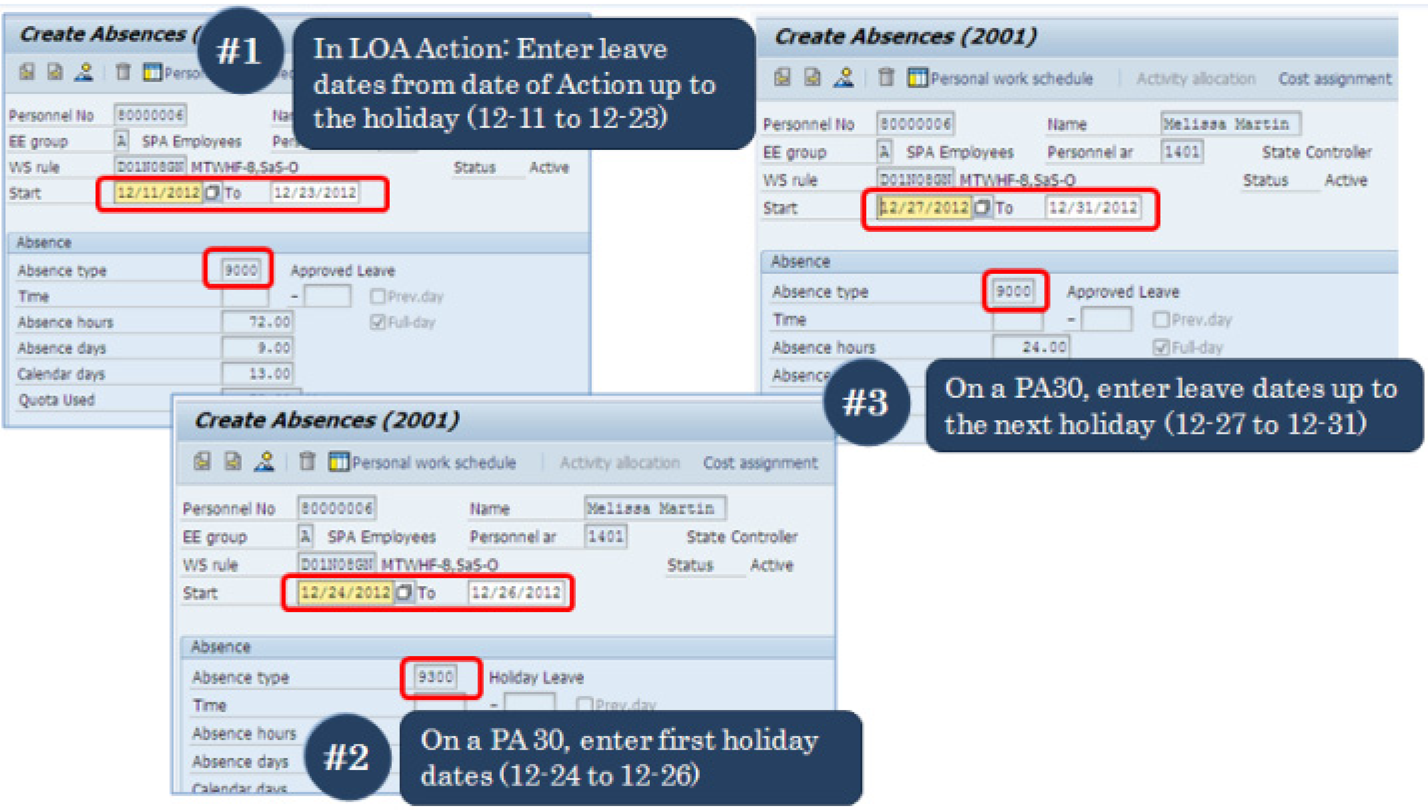
The Absences infotype (IT2001) is used to indicate the number of hours the employee wants to use for leave and deducts from the leave quotas as applicable. The dates you enter on the Absences infotype should align with the number of hours the employee wants to be paid out for leave. For instance, if the employee wanted to exhaust 24 hours of leave for the week of 12/4/2013 through 12/8/2013, you would enter those dates in the **Start** and **To** fields. You should never enter 12/31/9999 as the end date on IT2001. If you enter 12/31/9999 as the end date, HR will not be able to Reinstate nor Separate the employee and the Leave Administrator will not be able see the absences on the FMLA Workbench.

The hours that default are based on the Work Schedule Rule entered on the Planned Working Time infotype (IT0007) combined with the dates you enter on the Absences infotype.

Because the OSC HR/Payroll system is integrated, the hours entered on the Create Absences infotype (IT2001) are fed directly to payroll. A time sheet does not have to be entered. If the Create Absences infotype is not completed, the employee is on leave without pay.

NOTE: A*n agency can make an agency-wide (not individual user) decision that LOA leave can either be entered on a timesheet by the Time Administrator or by HR on IT2001. The agency must be consistent across all employees for the entire agency. Because the OSC HR/Payroll system is integrated, if the hours are entered on the Absences infotype 2001, they are processed during the next time evaluation.* **Do not enter Time via CATs**.

Absences (IT2001) Example with Holidays



If the employee is exhausting leave during a time that includes a holiday, additional IT2001 infotype records will be necessary to allow the employee to take holiday leave. The additional IT2001 records are created in transaction PA30. For example, assume an employee is going out on Short-Term Disability leave on December 11 and wants to exhaust 160 hours (from vacation and holiday) prior to beginning the STD leave.

NOTE: In this scenario, the system would have generated the holiday accrual for BOTH holiday periods noted. Manual holiday management would be needed in the event the Employee was still out when the Martin Luther King holiday comes around and beyond.

In this scenario, there are two holiday periods (12/24–12/26/2012 and 1/1/2013). Your entries would be as follows:

1. During the LOA Action, on the Absences (IT2001) infotype, you will enter the dates for the leave to be exhausted up to the holiday period in the Start and To fields:

   Start: 12/11/2012 To: 12/23/2012 (72 hours **LEAVE**)

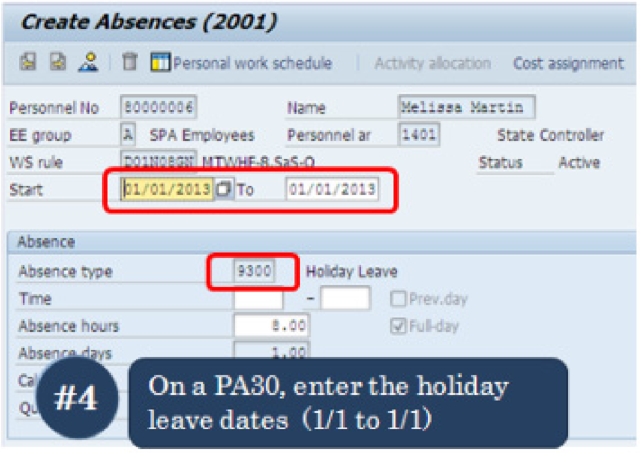
   By entering the dates above the system calculates that eight working days fall within the date range. The planned working time previously created issues an 8-hour workday for the employee; therefore, 72 hours default into the Absence hours field.

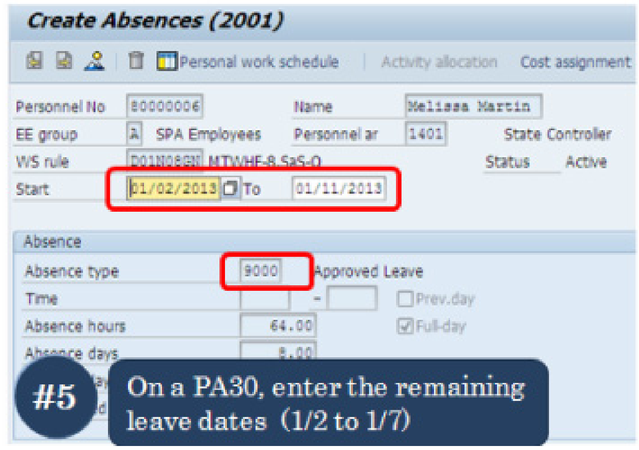
2. Create a PA30 to enter the first holiday period, infotype 2001, subtype 9300:

   Start: 12/24/2012 To: 12/26/2012 (24 hours **HOLIDAY**)

3. Create a PA30 to enter the next leave period up to the next holiday, infotype 2001, subtype 9000:

   Start: 12/27/2012 To: 12/31/2012 (24 hours **LEAVE**)





4. Create a PA30 to enter the next holiday period, infotype 2001, subtype 9300:

   Start: 01/01/2013 To: 01/01/2013 (8 hours **HOLIDAY**)

5. Create a PA30 to enter the remaining leave, in this case 32 hours, infotype 2001, subtype 9000

   Start: 01/02/2013 To: 01/07/2013 (32 hours **LEAVE**)

By entering the data on the Absences infotype as explained in this manner it is not necessary for a separate time sheet to be entered for the employee. If data is not entered on this infotype, the employee is on leave without pay.

PROCESS NOTE: If leave is being entered on a timesheet instead of IT2001, there is no need to enter leave on IT2001 as well.

PROCESS NOTE: Employees cannot accrue leave while on Short-Term Disability.

Leave/Longevity

If the employee is not using leave, they cannot accrue leave or longevity while on unpaid leave. In that case, Time Code 9400 (LWOP) must be used when creating records in IT2001.

SUMMARY

In this lesson, you learned how to:

- Identify the applicable Action to use for Short-Term Disability
- Determine the appropriate STD reasons for a Leave of Absence (LOA) Action
- Identify the infotypes associated with Short-Term Disability
- Describe the Workflow process
- Explain specific infotypes related to work schedules and absences

STD 60-Day Waiting Period

Lesson 2 Objectives

In this lesson we will learn to:

- Describe the 60-day waiting period purpose
- Discuss when it is applicable to use the 60-day waiting period
- Process a Leave of Absence with a STD 60-day waiting period

* *

EXERCISE 2.0: Logging on to the HR/Payroll System

SCENARIO

You need to log on to the OSC HR/Payroll system training client so that you can complete course exercises.

Instructions

Follow along with the Business Process Procedure (BPP) to complete the scenario in the system.

1. Access the **Training Portal web page**: https://trg-mybeacon.its.state.nc.us
2. Enter the **User ID** and password assigned to you by your instructor.
3. Click the **Log on** button.
4. Click **Yes** to confirm the security message displayed.
5. Click on the **SAP GUI** tab.
6. Click on the **Training Client** specified by your instructor.
7. **Stop** when you have reached the SAP Easy Access screen.
8. Right-click on the **Favorites** folder in the directory on the left hand side of the screen.
9. Select **Insert Transaction** from the drop-down list. A dialog box is displayed.

10. Type **ZPAA076** in the Transaction Code field and click the green check mark or press the Enter key to process your request. The Employee Actions transaction short cut is now visible in your Favorites folder.

11. Repeat steps 9-10 to add the following transactions to your Favorites folder:

    - **PA30** – Maintain HR Master Data
    - **S_PH0_48000450** – Date Monitoring

12. To display the transaction codes in the menu structure, select the **Extras > Settings > Display technical names** menu option.

    It is important that you complete all of the exercises in their entirety because some subsequent exercises depend upon the data that you entered in previous exercises.

13. Follow along as your instructor's tells you how to open the OSC Training HELP web page.

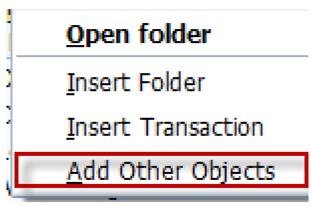
14. Click in the **browser address** at the top of the page.

15. **Copy** the highlighted web address.

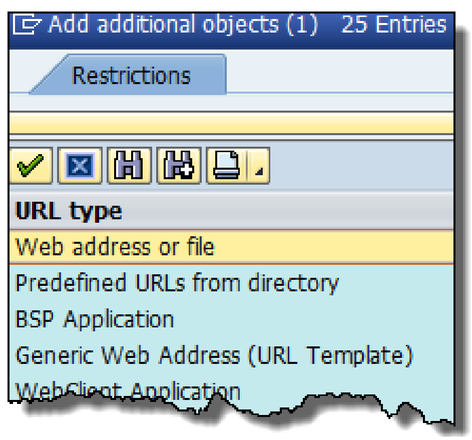
16. Go back to the SAP Easy Access screen.

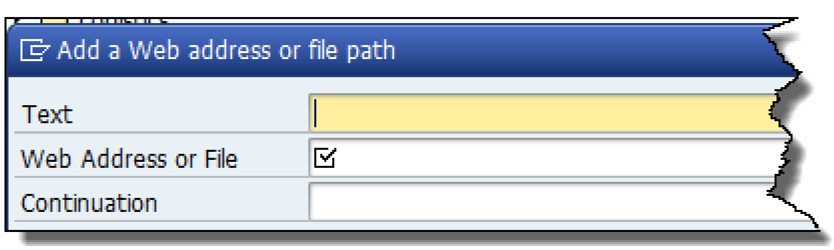
17. Right-click on your **Favorites** folder.

18. Click **Add Other Objects**.



19. Double-click **Web address or file**.





20. Enter the following title in the **Text** field: ***OSC Training HELP***.

21. Click in the **Web Address or File** field.

22. Paste the web address you just copied from the OSC Training HELP web page by pressing the **CTRL** and the **V** keys on your keyboard at the same time.

    🗁 **IMPORTANT**: You must use the **CTRL + V** keyboard combination to paste the address in the field.

23. Click the **green check** ✅ to create the web link in your Favorites folder.

24. Double-click the **URL** labeled OSC Training HELP to open the web page.

25. Close the web page when you have viewed it.

This exercise is complete. You are ready to proceed to the first exercise.

* *

STD 60-Day Waiting Period

Sometimes when an employee goes out on leave, it may not be apparent that the leave will be Short-Term Disability. In those cases, the 60-day waiting period may have already passed before you received the paperwork that indicated Short-Term Disability was approved. Perhaps the employee was out on FMLA or sick leave. In that case, you would still create an Action and use the 60-day waiting period reason once notified. By having a separate Action in this manner, the OSC HR/Payroll system will be able to track and report the percentage of employees who are on or have used the 60-day waiting period. If FMLA is running concurrent with STD – use FMLA until it ends then create the appropriate STD.

EXAMPLE:

In this example, the employee left work sick on 4/7/2013 and is out several days using sick leave while out.

Event Date	Event Description	HR Action
4/7/15	• EE leaves work sick • EE is out several days	• NONE
4/18/15	• EE provides a Doctor's note that indicates FMLA is in order, effective 4/7/15 • EE asks for information on Short-Term Disability	• Create **PCR**: LOA **REASON**: FMLA Eff. date: 4/7/15 • Notify the Leave Admin to create and track an FMLA Event
NOTE: FMLA runs 4/7/15 to 6/30/15 for EE		

5/6/15	• EE returns STD paperwork with Doctor's note • Doctor's note indicates that disability was effective 4/7/15	• Update comments on LOA-FMLA Action to indicate *60-Day Waiting Period is running concurrently with FMLA.* 🗁 **NOTE**: If the employee is using FMLA and approved for STD, add a comment to the LOA/FMLA action with the STD information. When the FMLA ends, create the appropriate LOA/STD action.
6/6/15	• 60-Day Waiting Period has ended • EE wishes to use Vacation Leave and Sick Leave for next phase of STD	• Create new **PCR**: LOA **REASON**: STD Leave Eff. date: 6/7/15
8/4/15	• EE is still out • Has exhausted all leave through COB 8/4/15	• Create new **PCR**: LOA **REASON**: STD Regular Eff. date: 8/5/15
6/16/16	• EE is still out on disability • Doctor's latest note indicates that EE could possibly return in a matter of 2-3 months	• Create new **PCR**: LOA **REASON**:-STD Extended Eff. date: 6/7/16
9/10/16	• EE returns to work • Doctor's note approves return to work with no restrictions.	• Create new **PCR**: Reinstatement/ Reemployment **REASON**: Return from STD Complete Eff. date: 9/10/16

🗁 **PROCESS NOTE**: Use *IT0019 – Monitoring of Tasks* to monitor and create reminders of applicable dates.

> **STOP!!!** - Prior to processing a LOA action, verify that no time work has been recorded on the "effective" date of the Action. If time worked has been recorded on the "effective" day, you will need to move the effective date to the first day with a full day absence.

* *

EXERCISE 2.1: Leave of Absence STD - 60-Day Waiting Period

> ***SCENARIO***
>
> Diane Burger, an Administrator at the Museum of Cape Fear, has been approved for Short-Term Disability effective today due to an illness. She is exhausting 40 hours of vacation leave during her 60-day waiting period.

Instructions

There are three parts to this Exercise:

I. Initiate Workflow (WF)

II. Watch as Instructor demonstrates the Agency and Funding approval process

III. Complete Approved PCR from the Initiator's Inbox

Part I - Initiate Workflow (WF) as Initiator

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the BPP to complete the exercise.

1. On the Easy Access screen, type **ZPAA076** in the Command field.

2. Click **Enter** . The Employee Action Request screen is displayed.

3. From the table below, select the Personnel number for Diane Burger assigned to you by your instructor and enter it into the **Personnel number** field.

	PERSONNEL #: *Diane Burger*						
A	80000550	F	80000555	K	80000560	P	80000565
B	80000551	G	80000556	L	80000561	Q	80000566
C	80000552	H	80000557	M	80000562	R	80000567
D	80000553	I	80000558	N	80000563	Inst 1	80000568
E	80000554	J	80000559	O	80000564	Inst 2	80000569

Record the Personnel number you used on your Transaction Log.

4. Enter the following data:

Field	Value
Effective on	**Today's date.** Record the date on your Transaction Log.
Action Type	**Leave of Absence**
Reason	**Short-Term Disability 60-day waiting period**

5. Click the **Enter** button.

6. Click **Create** . The second screen of the Employee Action Request screen is displayed.

7. Enter the following data:

Field	Value
Annual Salary	Same as the EE's current salary (**Hint**: Look in *Current* column)

NOTE: Observe there is a field that will not be used now, but will be used later when a Separation Action is processed: Last Day Worked.

8. Click the **Enter** button.

9. Click the **Save** button. The Information pop-up is displayed with the assigned PCR number.

10. Write the PCR number on your Transaction Log.

11. Click to close the pop-up.

12. Click the **Services for Object** button.

    NOTE: This button is not available until you save the PCR. The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon. Private notes can only be seen by the Initiator.

13. Select **Create > Create Note**.

14. Enter a **note title.**

15. Click in the note section and write the applicable information to send along with the PCR. Begin the note with your name and the date.

    NOTE: The notes that you write are only recorded in the Workflow PCR; they do not follow in the PA Action. However, you can copy and paste from PCR into the Action when you are processing the infotypes. Private notes can only be seen by the person who created them.

16. Click the **green check** to close the notes. If applicable, close the notes icon menu.

17. Click Initiate WF. The Information pop-up displays indicating that the PCR has been submitted.

18. Click the **green check** to close the Information pop-up. The system returns to the Employee Action Request (first screen).

19. Click the **Back** button to return to the Easy Access screen.

20. You must now wait until the PCR has been approved and is back in your Inbox.

Part II - Wait for the Agency Approver to Approve

There is one approval level:

- Agency

Your instructor and/or navigator will perform this part.

Part III – Complete the Approved PCR from the Initiator Inbox

21. From the Easy Access screen, click the **SAP Business Workplace** button.

22. Click the node beside **Inbox** Inbox to expand it.

23. Before you process the PCR, make a copy of the note in order to paste it into the Actions infotype:

    a. Select (do not double-click) the PCR to select it.

    b. At the bottom of the screen, click the Ad hoc object "header" (not tracker) link: PA PCR xxxxx ##### (where X and # represent employee's name and PCR number).

    c. At the Employee Action Request screen, click the **Services for Object** button to review the notes or attachments.

    d. Select **Attachment List**.

    e. Highlight the line item for the note.

    f. Double-click or use the eyeglasses.

    g. Highlight the entire note, including the title.

    h. Right click and select **Copy.** You can either keep the copied note in the clipboard for use later, or paste it to a Word document for later use. **Do not leave the PCR open in a second session.**

    i. Click **X** to close the Display note popup.

    j. Click **X** to close the Services for Objects pop-up.

    BEST PRACTICE: It is a best practice to make sure the PCR is closed before you process the approved PCR Actions.

    k. Click the **Back** button.

24. With the PCR still selected, click the **Execute** button (or double-click the PCR line item). The system automatically takes you to the applicable screen for the Action (in this exercise, it is the Personnel Actions screen).

25. On the Personnel Actions screen, enter the following data:

Field	Value
From	**Today's date** (should always be the same that you entered on PCR)
Action Type	Leave of Absence (Highlight and select)

26. Click **Execute** .

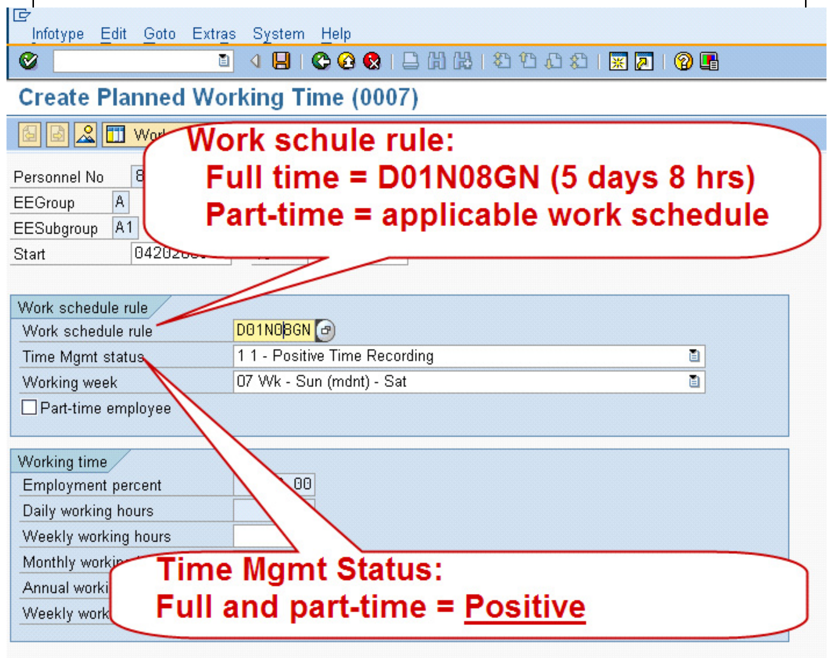
    NOTE: It is a best practice to always save a pre-populated infotype even if you do not make changes. In some cases, there are dynamic infotypes that display only when the previous infotype was saved. If you use the Next record button instead of saving, those dynamic infotypes will not display and the employee's record will be incomplete.

27. Complete the following fields:

Field	Value
Actions (IT000)	

Reason for Action	Observe the field defaulted from PCR.
Reference Per. No	Leave blank
Position	Observe the field defaulted from PCR.
EE Group/Subgroup	Observe the field defaulted from PCR. **Enter** and **Save**
Enter note copied from PCR	From the menu bar: • Select **Edit**. • **Maintain text**. • Click **Enter** if a warning message displays indicating that person and position have different group/subgroup • Use **Ctrl+V** (or use the Insert button) to paste the note from the PCR. • Click **Save**. • Click **Enter** and **Save** as needed to bypass warning messages again.
Organizational Assignment (IT0001)	**Contract field** – used to further classify employees. When an employee is LOA – Short-Term Disability and not using leave, this field is used to indicate whether or not the employee's health insurance will be partially paid by the State or completely paid by the employee. Employees with less than 5 years of creditable service must pay both the employee and employer cost. Employees with 5 or more years of creditable service leave this field blank unless another status such as Retiree is appropriate. **Save**. 🗁 **NOTE**: If the Contract field is completed on the previous IT0001, it will copy to the new IT0001.
Monitoring of Tasks (IT0019)	**Save** the note.
Task Type	From the drop-down menu, select **S/T Disability 60-day.**
Date of Task	Use the calendar icon to select the date that is the end of the 60-day waiting period.
Reminder Date	When you press Enter, the reminder date field automatically populates. Change if applicable.

Comment	🗁 **NOTE**: Since the comments do not wrap at the end of the line, use the Edit > Maintain Text function located on the menu bar to add the comments below to the infotype. Remember to start any comments with your name and the date. In your work environment, write whatever notes are required by your Agency. In class, we are only entering short notes for expediency. Enter the following: *<your name, date> The employee is expected to return to work at the end of 12 weeks.* Click **Save** to save the note. Observe the note icon displays as part of the infotype. Click **Save** again to save the infotype. To view a list of your tasks, you must run the SAP report *Date Monitoring Report* (transaction *S_PHO_48000450*) or the BI report *B0099- Employee Deadline*.
Delimit Objects on Loan (IT0040	Click **Next Record** button. In your work environment, follow your Agency's policy regarding whether or not employees should return items while out on leave. If the employees return the items, then you would delimit the infotype.

Planned Working Time (IT0007)	Make the following selections: • Enter **D01N08GN** in the Work schedule rule field. • Change the Time Mgmt status to **Positive Time Recording**.  IMPORTANT! - All full-time employees must be on a 5 -day 8-hour per day work schedule. The easiest way to accomplish this is to use D01N08GN. All employees, whether full-time or part-time, must be positive time recording. For part-time employees, select an equivalent work schedule M-F. Example – PT EE 36 hrs equivalent schedule would be 5 x 7.2 = WSR DD9N1001 A 28-day employee will remain on the 28-day working week as long as they are exhausting leave. The working week should be changed to the normal agency specific working week on the 1st day they use LWOP. The work schedule rule is still changed to D01N08GN. **Enter** and **Save**
Subtypes for infotypes Absences	If the employee should not accrue leave or longevity while on unpaid leave, enter Time code 9400 (LWOP) in IT2001. For this exercise; select **9000 Approved Leave**.
Absences (IT2001)	
Start	Use **today's date** (start of employee leave). **NOTE**: If you had closed the pop-up for Infotype Absences (see previous step), the Create Absences infotype would not display.

To	Enter a date that you estimate is appropriate for the hours the employee wants to use. **Never enter 12/31/9999 as the 'to date'.** In our exercise, the employee is using **40** hours. Click the **green check Enter** button. (DO NOT press the Enter key on your keyboard.) The applicable number of hours and days should default in the appropriate fields. If necessary, change the end date so that hours and dates calculate correctly. Click **Save**. The Collision pop-up box is displayed again. If an employee wants to use the time that was accrued while he or she was out on paid leave, you will have to create a new IT2001 via PA30 in order to enter the new leave time.
Subtypes for Time Quota Compensation Pop-up (IT0416)	**X (close)** out for this scenario because the employee has not elected to receive a lump sum payout.

REMINDER:

- If the employee should not accrue leave or longevity while on unpaid leave, enter Time Code 9400 (LWOP) in IT2001.
- Holidays – if employee is exhausting leave and a holiday is included - see the previous lesson in this book (Lesson 1) for examples explaining how to enter holiday absences.

Additional Resource
You can find several additional support materials about LOA - Short-Term Disability on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/index.html Follow the following path to access the latest version of the Student Guide: *Personnel Administration > Student Guides* • PA370 - Short-Term Disability

28. Click the **Back** button at the Personnel Actions screen (the system automatically returns you to Personnel Actions when you finish the last infotype within the Action). The pop-up displays indicating that the item must be explicitly completed. The pop-up displays indicating that the item must be explicitly completed.

29. The pop-up is displayed indicating that the item must be explicitly completed. Click **Complete Work Item** Complete Work Item.

> ***NOTE**: It is critical that you complete this last step. Due to system configuration, you may not be able to create another PCR or the system could default the wrong data with more than one approved PCR status.*

This exercise is complete.

* *

SUMMARY

In this lesson, you learned how to:

- Describe the 60-day waiting period purpose
- Discuss when it is applicable to use the 60-day waiting period
- Process a Leave of Absence with a STD 60-day waiting period

STD After 60-Day Waiting Period

Lesson 3 Objectives

In this lesson we will learn to:

- Describe the 60-day waiting period purpose
- Discuss when it is applicable to use the 60-day waiting period
- Process a Leave of Absence with a STD 60-day waiting period
- Run the Date Monitoring Report

STD After 60-Day Waiting Period

There are two reasons that may be applicable to use after an employee's 60-day waiting period has expired (assuming the employee did not return to work). Those reasons are:

- Short-Term Disability Regular
- Short-Term Disability (Leave)

The employee may be on either Regular or Leave as applicable for 12 months (14 months if the 60-day waiting period is included).

If the employee does not return from either Regular or Leave and is approved, a new reason is applicable:

- Short-Term Disability Extended

Regular and Leave Reasons

After an employee has passed the 60th day on LOA – Short-Term Disability 60-day waiting period, a new LOA Action will need to be created if the employee did not return to work. In this case, the reason for the new LOA Action will either be Regular or Leave, depending upon whether or not the employee will be exhausting leave the entire time the employee is out. Regardless of which reason is applicable, the effective date of the new LOA Action is on the 61st day.

LOA – Short-Term Disability Regular was meant to be used for those circumstances when the employee will not be paid while out. Either the employee has no available leave to exhaust while out, or has chosen not to use any leave. Entered on the 61st day.

LOA-Short-Term Disability (Leave) is typically used when the employee has an extensive number of hours of leave and will be exhausting leave the entire time of absence. Entered on the 61st day.

It is the Agency's responsibility to:

- Notify the State Retirement system of the reimbursable amount for the second six months of STD, whether the reason is Regular or Leave.
- Run the Wage Type Reporter to get the numbers. The majority of Agencies should have access to the report.
- Notify the employee when STD is pending between extended and long-term.

Additional Resource
You can find several additional support materials about the Wage Type Reporter on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/index.html Follow the following path to access the latest version of the support materials: *Payroll > BPPs* • PC00M10CLJN Display Payroll Journal

STD - Extended

The extended STD is used to give an employee up to 365 days of STD, if needed, when the disability is likely to be temporary and the regular STD has expired. The effective date of STD Extended is 12 months after the effective date for the regular STD or 14 months after the LOA action if including the 60-day waiting period.

The employee may only remain on extended STD for a period of 12 months. At the end of 12 months, if the employee has not returned to work, the employee will need to be separated from the OSC HR/Payroll system. Likewise, if at any time during the extended STD the employee is approved for Long-Term Disability, he or she will be separated from the system. A Long-Term Disability is likely to be a permanent disability. On the other hand, if the employee is able to return to work, a Reinstatement/Reemployment Action is processed.

* *

EXERCISE 3.1: LOA for STD Regular

SCENARIO
It has been 61 calendar days since Diane went on STD 60-day waiting period. She is not planning to use leave for her continued absence. A new LOA with the STD Regular needs to be created. When contacted, Diane indicated she thought she would be back within 12 months.

Instructions

There are three parts to this Exercise:

I. Initiate Workflow (WF)

II. Wait for the Approval by the Agency Approver (instructor or nav in this class)

III. Complete Approved PCR from the Initiator's Inbox

Part I - Initiate Workflow (WF) as Initiator

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the BPP to complete the exercise.

1. On the Easy Access screen, type **ZPAA076** in the Command field.
2. Click **Enter**. The Employee Action Request screen is displayed.
3. From the table below, select the Personnel number for Diane Burger assigned to you by your instructor and enter it into the **Personnel number** field.

	PERSONNEL #: *Diane Burger*						
A	80000550	F	80000555	K	80000560	P	80000565
B	80000551	G	80000556	L	80000561	Q	80000566
C	80000552	H	80000557	M	80000562	R	80000567
D	80000553	I	80000558	N	80000563	Inst 1	80000568
E	80000554	J	80000559	O	80000564	Inst 2	80000569

Record the Personnel number you used on your Transaction Log.

4. Enter the following data:

Field	Value
Effective on	61 days after the first LOA in the previous exercise
Action Type	Leave of Absence
Reason	Short-Term Disability Regular

5. Click the **Enter** button.
6. Click **Create**. The second screen of the Employee Action Request screen is displayed.
7. Enter the following data:

Field	Value
Annual Salary	Same as the EE's current salary (**Hint**: Look in *Current* column)

8. Click **Enter**.
9. Click **Save**. The Information pop-up is displayed with the assigned PCR number.
10. Write the PCR number on your Transaction Log.
11. Click to close the pop-up.

12. Click the **Services for Object** button.

NOTE: This button is not available until you save the PCR. The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon. Private notes can only be seen by the Initiator.

13. Select **Create > Create Note**.

14. Enter a **note title**.

15. Click in the note section and write the applicable information to send along with the PCR. Begin the note with your name and the date.

NOTE: The notes that you write are only recorded in the Workflow PCR; they do not follow in the PA Action. However, you can copy and paste from PCR into the Action when you are processing the infotypes. Private notes can only be seen by the person who created them.

16. Click the **green check** to close the notes. If applicable, close the notes icon menu.

17. Click Initiate WF. The Information pop-up displays indicating that the PCR has been submitted.

18. Click the **green check** to close the Information pop-up. The system returns to the Employee Action Request (first screen).

19. Click the **Back** button to return to the Easy Access screen.

20. You must now wait until the PCR has been approved and is back in your Inbox.

Part II - Wait for the Agency Approver to Approve

There is one approval level:

- Agency

Your instructor and/or navigator will perform this part.

Part III – Complete the Approved PCR from the Initiator Inbox

NOTE: In this exercise, you are processing an employee who already has an existing record; therefore, each infotype will have a warning message that the previous record will be delimited. Press Enter to bypass the warning message.

21. From the Easy Access screen, click the **SAP Business Workplace** button.

22. Click the node beside **Inbox** Inbox to expand it.

23. Before you process the PCR, make a copy of the note in order to paste it into the Actions infotype:

    a. Select (do not double-click) the PCR to select it.

b. At the bottom of the screen, click the Ad hoc object "header" (not tracker) link: PA PCR xxxxx ###### (where X and # represent employee's name and PCR number).

c. At the Employee Action Request screen, click the **Services for Object** button to review the notes or attachments.

d. Select **Attachment List**.

e. Highlight the line item for the note.

f. Double-click or use the eyeglasses.

g. Highlight the entire note, including the title.

h. Right click and select **Copy**. You can either keep the copied note in the clipboard for use later, or paste it to a Word document for later use. **Do not leave the PCR open in a second session.**

i. Click **X** to close the Display note popup.

j. Click **X** to close the Services for Objects pop-up.

k. Click the **Back** button.

24. With the PCR still selected, click the **Execute** button (or double-click the PCR line item). The system automatically takes you to the applicable screen for the Action (in this exercise, it is the Personnel Actions screen).

25. On the Personnel Actions screen, enter the following data:

Field	Value
From	Use the same date that you used on the PCR.
Action Type	**Leave of Absence** (Highlight and select)

26. Click **Execute** .

NOTE: It is a best practice to always save a pre-populated infotype even if you do not make changes. In some cases, there are dynamic infotypes that display only when the previous infotype was saved. If you use the Next record button instead of saving, those dynamic infotypes will not display and the employee's record will be incomplete.

27. Complete the following fields:

Field	Value
Actions (IT000)	
Reason for Action	Observe the field defaulted from PCR.
Reference Per. No	Leave blank
Position	Observe the field defaulted from PCR.
EE Group/Subgroup	Observe the field defaulted from PCR. **Enter** and **Save**

Enter note copied from PCR	From the menu bar: • Select **Edit**. • **Maintain text**. • Click **Enter** if a warning message displays indicating that person and position have different group/subgroup • Use **Ctrl+V** (or use the Insert button) to paste the note from the PCR. • Click **Save**. • Click **Enter** and **Save** as needed to bypass warning messages again.
Organizational Assignment (IT0001)	**Contract field** – used to further classify employees. When an employee is LOA – Short-Term disability and not using leave, this field is used to indicate whether or not the employee's health insurance will be partially paid by the State or completely paid by the employee. Employees with less than 5 years of creditable service must pay both the employee and employer cost. Employees with 5 or more years of creditable service leave this field blank unless another status such as Retiree is appropriate. **Save**. 🗁 **NOTE**: If the Contract field is completed on the previous IT0001, it will copy to the new IT0001.
Monitoring of Tasks (IT0019)	
Task Type	Select **estimated return date**
Date of Task	30 days (from the effective date of the Action). 🗁 **BEST PRACTICE**: It is a best practice to follow-up on employees who are out on leave every 30 days.
Reminder Date	When you press Enter, the reminder date field automatically populates. Change if applicable.

Comment	**NOTE**: Since the comments do not wrap at the end of the line, use the Edit > Maintain Text function located on the menu bar to add the comments below to the infotype. Remember to start any comments with your name and the date. In your work environment, write whatever notes are required by your Agency. In class, we are only entering short notes for expediency. Enter the following: *<your name, date> The employee is expected to return to work at the end of 12 months.* Click **Save** to save the note. Observe the note icon displays as part of the infotype. Click **Save** again to save the infotype. To view a list of your tasks, you must run the SAP report *Date Monitoring Report* (transaction *S_PHO_48000450*) or the BI report *B0099- Employee Deadline*.
Delimit Objects on Loan (IT0040	Click **Next Record** button. In your work environment, follow your Agency's policy regarding whether or not employees should return items while out on leave. If the employees return the items, then you would delimit the infotype.
Planned Working Time (IT0007)	**Enter** and **Save** — the data should have populated from the original LOA Action.
Subtypes for infotypes Absences	If the employee should not accrue leave or longevity while on unpaid leave, enter Time code 9400 (LWOP) in IT2001.
Subtypes for Time Quota Compensation Pop-up (IT0416)	**X (close)** out for this scenario because the employee has not elected to receive a lump sum payout.

28. Click the **Back** button at the Personnel Actions screen (the system automatically returns you to Personnel Actions when you finish the last infotype within the Action). The pop-up displays indicating that the item must be explicitly completed. The pop-up displays indicating that the item must be explicitly completed.

29. The pop-up is displayed indicating that the item must be explicitly completed. Click **Complete Work Item** Complete Work Item.

> ***NOTE****: It is critical that you complete this last step. Due to system configuration, you may not be able to create another PCR or the system could default the wrong data with more than one approved PCR status.*

This exercise is complete.

* *

EXERCISE 3.2: Monitoring of Tasks Report

SCENARIO

It is your practice to run the Monitoring of Tasks report each Monday morning to obtain upcoming due dates for tasks previously entered in the system. You normally run the ERP version (Date Monitoring report S_PH0_48000450) of the report.

NOTE: You can also run the BOBJ version of the report which is the B0099 - Employee Deadline Dates report.

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/. Follow along with the BPP to complete the exercise.

1. On the Easy Access screen, type **S_PH0_48000450** in the Command field (or click the transaction in your Favorites folder if you have saved it in your SAP Easy Access Favorites folder.

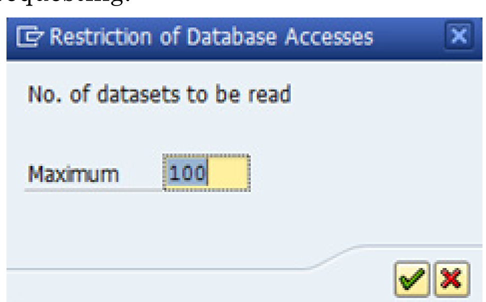
2. Click **Enter** . The Task Monitoring screen is displayed.

3. In the Period section, click the **Other period** radio button if it is not selected.

4. Enter the following data:

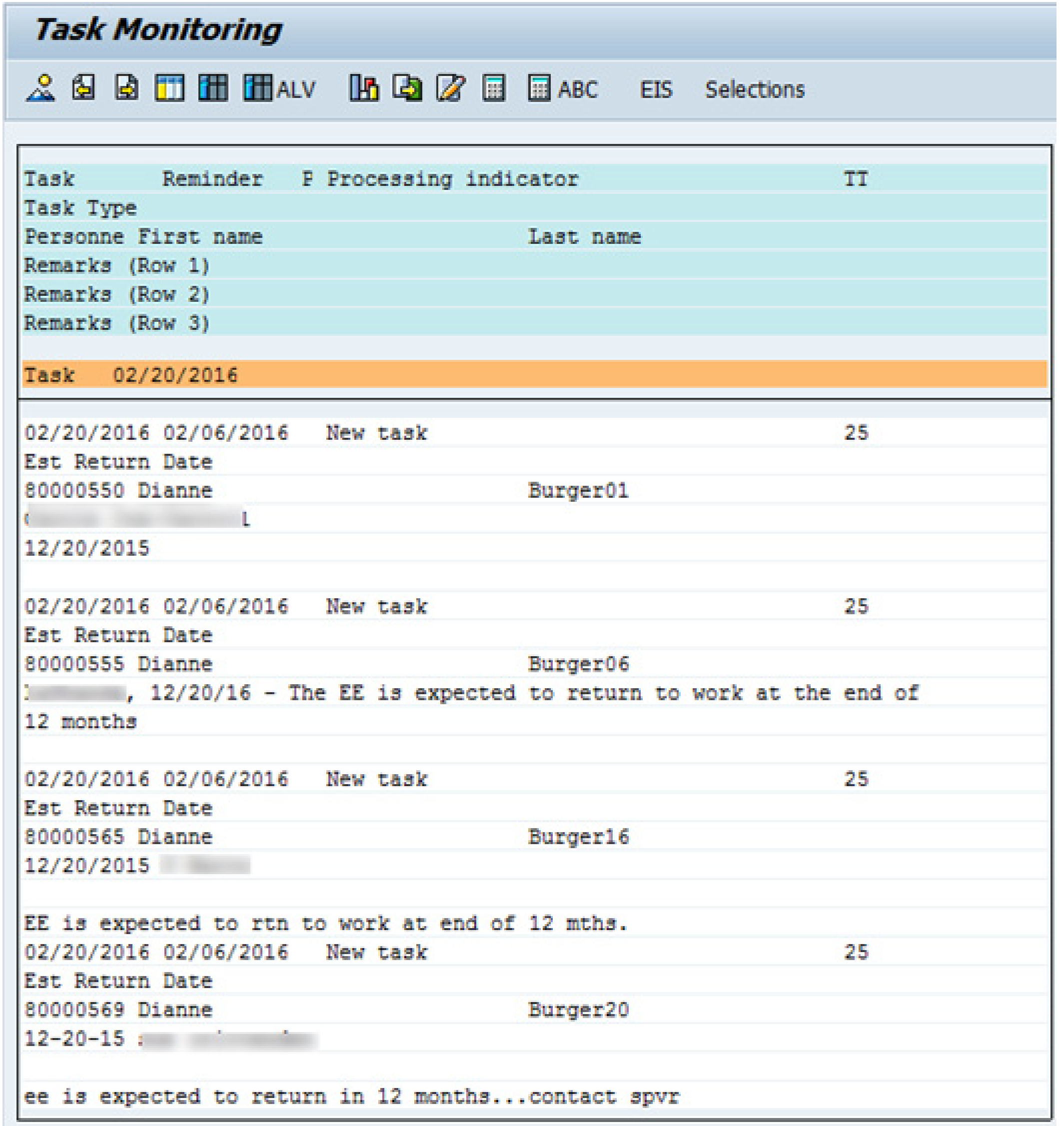
Field	Value
Data Selection Period	**<Current date>** to **<6 months in the future>**

NOTE: If you do not limit your date range, you may see the following pop-up box displayed on your screen letting you know that you might want to reduce the range of records you are requesting.



If you see the pop-up box, just X out of it to continue.

5. Click **Execute** to run the report.



SUMMARY

In this lesson, you learned how to:

- Describe the 60-day waiting period purpose
- Discuss when it is applicable to use the 60-day waiting period
- Process a Leave of Absence with a STD 60-day waiting period
- Run the Date Monitoring report

Benefits

Lesson 4 Objectives

In this lesson we will learn to:

- Describe how benefits are impacted while employee is out on STD leave

Benefits Overview

- Benefits (Employee is not using approved leave.)
  - Employee receives LOA Continuation notice (transaction ZBNS008) by their Agency HBR.
  - Benefitfocus notifies vendors if benefits are stopped.
  - BEST terminates NC Flex Plans while the employee is on STD.
- Agency-specific benefits – handled by agency
- NC Flex Plans - **The premium is not automatically deducted from the STD payment**.
  - Will terminate in the OSC HR/Payroll system
  - Will end the last day of the month premiums were paid
  - Employees can continue these benefits plans while on LOA by paying the NC Flex vendors directly.
  - Premiums will not be deducted from STD payments.

Employees who are out on leave of absence will receive an LOA Continuation form letter. The form letter is generated by either HR or Benefits using transaction code ZBNS008.

If the employee has agency-specific deductions, those are handled outside of the OSC HR/Payroll system. The agency should notify the employee about the process in those cases.

As long as the employee is in pay status (using leave while on STD), the deductions for benefits will automatically occur on a pre-tax basis. However, if the STD LOA employee is not using leave, but only receiving STD payments, the deductions for benefits <u>will not</u> be taken from the STD payments with the exception of the State Health Plan. If premiums are not payroll deducted, employees must send a check as applicable by the benefit deadline date. NC Flex must be sent directly to the vendors according to the vendors' deadlines.

State Health Plan

Employer contribution will continue as long as the employee is on STD (with more than 5 years of creditable service). While on the 60-Day Waiting period, the employee is responsible for the full cost of premiums if this period is not covered by FMLA or if Employee is not exhausting accrued leave.

Employees are responsible for sending any dependent premiums and/or any employee only costs to BEST Shared Services. If premiums are not received each month, their coverage will be reduced to the 70/30 Plan for Employee Only and the dependent coverage will be delimited. Their next opportunity for any changes will be at the next Annual Enrollment.

Employees on STD that requires them to pay full cost for their health insurance coverage must send premiums to BEST Shared Services. If premiums are not received their health insurance coverage will be terminated.

The premium for State Health Plan will be deducted from the STD benefit on an after-tax basis.

NOTE: SHP is the only premium deducted from the STD benefit.

Additional Resource
You can find several additional support materials about Benefits Administration while on LOA on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/index.html Follow the following path to access the latest version of the support materials: *Benefits > Webinar* • LOA Benefits Processing *Benefits > Job Aids* • HBRLOA Benefits Administration Job Aid *Personnel Administration > Job Aids* • LOA Checklist - STD

SUMMARY

In this lesson, you learned how to:

- Describe how benefits are impacted while employee is out on STD leave

IT2010 Process

Lesson 5 Objectives

In this lesson we will learn to:

- Define IT2010
- Explain wage types
- Process a 2010 payment

Infotype 2010 Process

Processes outside of the OSC HR/Payroll system include:

- The STD Specialist completes Forms 714 and 711.
- The employee ensures the doctor completes Form 703.
- The employee makes sure the STD Specialist receives Form 703 every 30 days. The only exception is when an employee has a DIP-7A approval.

> 🗁 DIP-7A is a medical form that goes before the Medical Review Board at the Retirement Center. When approved, this form replaces the need for the employee to submit the monthly Form 703.

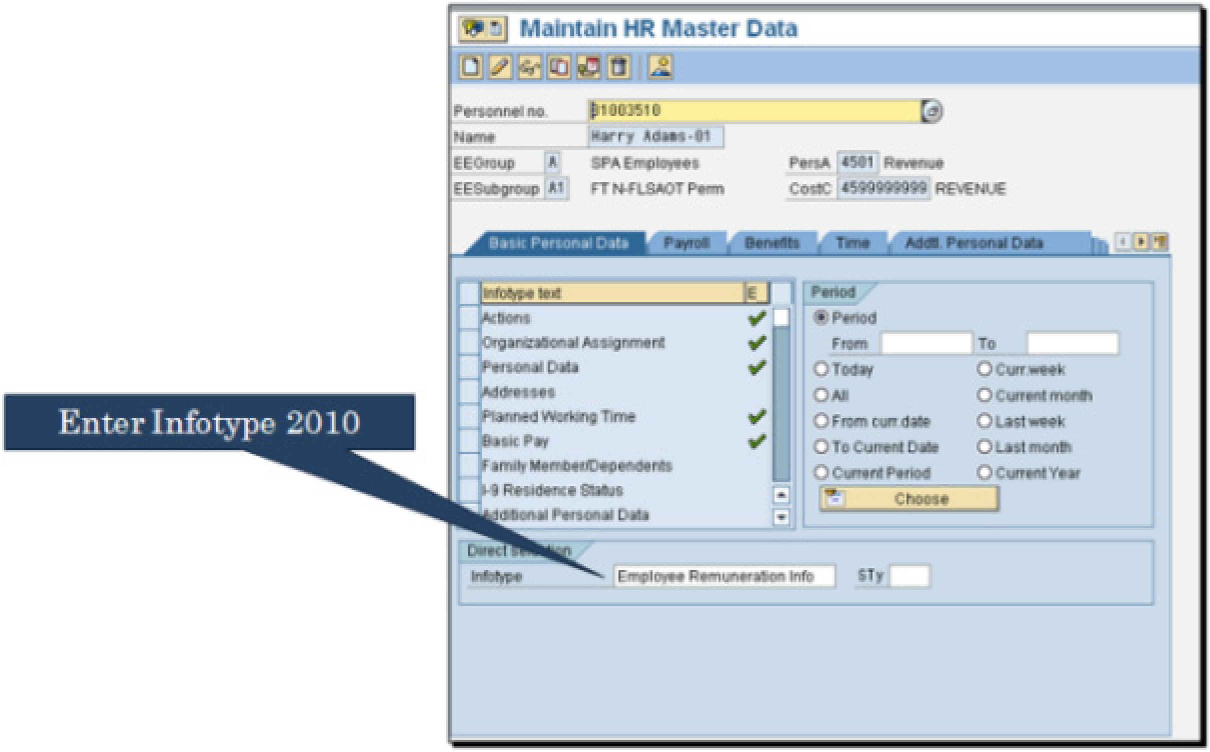
In the system, after the STD Specialist receives Form 703, transaction PA30 is used to create IT2010. The wage type and amount is entered on the infotype.

The STD Specialist enters a separate IT2010 for each Form 703, even if multiple 703s for different months are received on the same day.

The infotype should use the effective dates for which the benefit is designed.

- *Example*: Form received January, 2015, The doctor signed the 703 form in January, 2015 for December 2014 benefits. You should date the infotype 12/1/2014 since this is the month the in which the doctor certified the benefit.

Transaction Code PA30



Creating the Remuneration IT2010 is a PA30 process. Since it is not an Action, it is not processed via ZPAA076. Of course, you must have the appropriate documentation as back-up before creating the PA30.

Amount – The amount is calculated benefit amount to be paid from forms 714 and 711. For wage types 1332-1335 (see next page), the OSC HR/Payroll system will only allow dollar amounts. Do not enter anything in the number of hours field or number unit field.

Amount limit - 703 forms must be submitted for past months. A 703 form cannot be submitted until the month has been completed. If keying multiple 703 forms, the IT2010 must be dated within the month the 703 was certified by the doctor. You must create an IT2010 for every 703 submitted.
One 703 = one IT2010.

For example, an employee has been on LOA –STD since 4/1/15. On 8/15/15 the employee brings in 703s for April, May, June, and July.

Based on the calculations, the benefit is determined to be $985. On 8/15, you can enter the following:

- **IT2010 with effective date of 4/1 for $985**
- **IT2010 with effective date of 5/1 for $985**
- **IT2010 with effective date of 6/1 for $985**
- **IT2010 with effective date of 7/1 for $985**

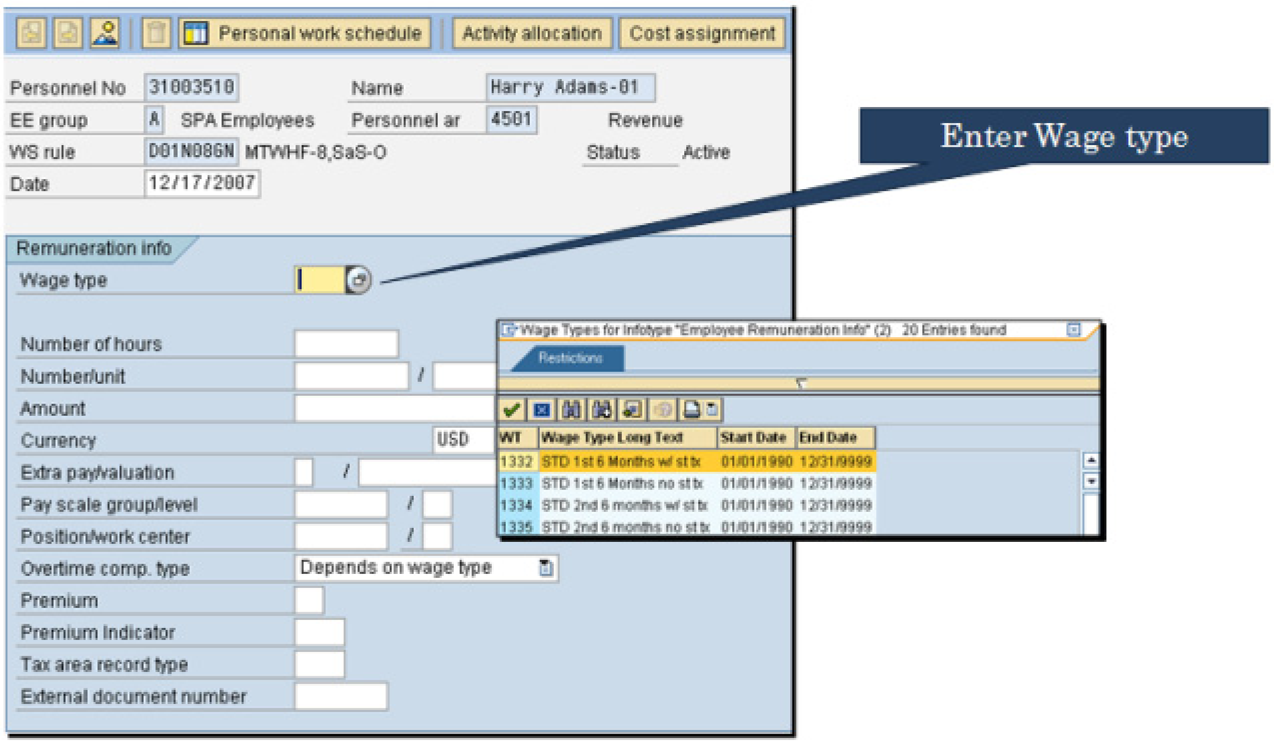
Based on this example, you can pay all the submitted 703 forms. The payment in August will reflect four submitted 703 forms. Benefits are paid one month behind.

🗁 **NOTE regarding the Payroll Wall:** If the Payroll Wall needs to be taken down, you must follow your agency process. The authorized staff member in your agency must put a ticket in to BEST Shared Services requesting the wall to be taken down for a short and specific time frame in which your agency staff can make the necessary changes. The wall will then be brought back up to prevent actions that will cause retro impacts to your Agency's budget.

You can pay out a retro approved STD benefit and receive more than $3,000 in one paycheck. Per BEST Payroll, you cannot pay out August until September payroll.

The benefit cannot exceed $3,000 for any one pay period. For example, if the employee ordinarily makes $7,000 per month. Half would be $3,500. They can only receive a benefit of a maximum of $3,000 per month. If the STD was approved retro to cover the last four months, the employee might receive a lump sum for retro benefits for four months…$12,000.

Create Employee Remuneration (IT2010)



The second screen of IT2010 is used to enter the wage type and the dollar amount of the STD payment. The following wage types are used as applicable. It is critical that you key the correct wage type for **first** and **second** six months.

- 1332 – Select if employee did not have five or more years of service as of 8/12/1989 (Bailey Act) for the first six months of Short -Term Disability (STD). Benefits are subject to state income tax.
- 1333 - Select if employee had five or more years of service as of 8/12/1989 (Bailey Act) for first six months of STD. Benefits are not subject to state income tax.
- 1334 - Select if employee's did not have five or more years of service as of 8/12/1989 (Bailey Act) for second six months of STD. Benefits are subject to state income tax.
- 1335 – Select if employee had five or more years of service as of 8/12/1989 (Bailey Act) for second six months of STD. Benefits are not subject to state income tax.

* *

EXERCISE 5.1: Employee Remuneration

SCENARIO

Diane's Form 703 has been approved and signed by the Doctor. Enter the wage type and amount so that Diane can receive her STD payment. Since this is a PA30 transaction, it is not initiated via Workflow.

NOTE: *Each time a 703 is signed by the doctor and returned to the STD Specialist, an IT2010 is created.*

Instructions

1. On the Easy Access screen, type **PA30** in the Command field and click **Enter** .
2. Complete the following field:

Field	Value
Infotype	2010

3. Click **Enter**.
4. Click **Create**.
5. Enter the following data:

Field	Value
Date	First day of current month
Wage Type	From the drop-down menu, select **1332 (STD 1st 6 months)**. It is important to remember that the Wage Type you choose is determined by the years of service the employee has as of 8/12/1989. The code you select determines if the employee's benefits are subject to State taxes or not. In this example, the employee does NOT have previous service prior to 8/12/1989.
Amount	**$1813.00** (Reflects amount calculated from Forms 714 and 711)
Comments	Add comments to this infotype payment: • To indicate the month for which the payment represents (usually the previous month) • To indicate EE does NOT have service prior to 8/12/1989.

6. Click **Enter**.
7. Click **Save**.

This exercise is complete.

* *

SUMMARY

In this lesson, you learned how to:

- Define IT2010.
- Explain wage types.
- Process a 2010 payment.

Course Review

Course Objectives

In this lesson we will learn to:

- Define key Short-Term Disability (STD) terms and concepts
- Describe the Short-Term Disability process
- View, create and maintain a Leave of Absence for Short-Term Disability

Next Steps

- Monitor the HR/Payroll System communication
  - — BEST Shared Services web site (especially the Updates tab)
    URL: http://www.osc.nc.gov/BEST/index.html
  - — BEACON Training website: **What's New** link
    URL: http://www.osc.nc.gov/beacon/training/whats_new.html
- Review conceptual materials
- Access the Training HELP site
  URL: http://www.osc.nc.gov/training/osctd/help
- Practice what you've learned
  URL: http://mybeacon.nc.gov
  - — Client 899
  - — Use your current NCID user name and password

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

🗁 Follow the link provided above to access the training client through the HR/Payroll Portal. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance?

Remember to access the Training HELP website when you need assistance in completing transactions. As stated above, the work instructions can be accessed on line through the web link in the steps above.

Course Assessment/Evaluation

Follow the instructions given by your instructor to complete your Course Assessment and Class Evaluation of today's class in the Learning Management System (LMS).

> **PROCESS NOTE**: On the Course Evaluation, you must enter text in all text fields. If you leave the field blank, the screen will clear all your responses when you click the Submit button and re-display for you to complete.
>
> If you do not wish to comment, please type NA in the field so you can complete the evaluation process.

CONGRATULATIONS!

You've completed the course!

PA370 Workflow Transaction Log

EX #	Exercise Title	Data to Enter	PCR Number	PCR Eff. Date
2.1	LOA – STD-60-Day Waiting Period *DIANE BURGER*	PERNR used: ____________________	PCR #: _______________	Date: _________________
3.1	LOA – STD Regular *DIANE BURGER*	PERNR used: ____________________	PCR #: _______________	Date: _________________