



OSC HR/Payroll Training

Leave Administration TM310

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HR/Payroll Training - Welcome

Welcome to the *Leave Administration* course.

- Introductions
- Tent cards
- Restrooms
- Breaks (Common and Smoking Areas)
- Parking Lots
- Classroom etiquette
 - Cell phones on vibrate/off
 - Email/Internet/Texting
 - Quiet side conversations
- Fire safety information



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Also ensure that others have a quality training experience. Please turn your cell phones off during class so others are not disturbed. Thanks.



Prerequisites

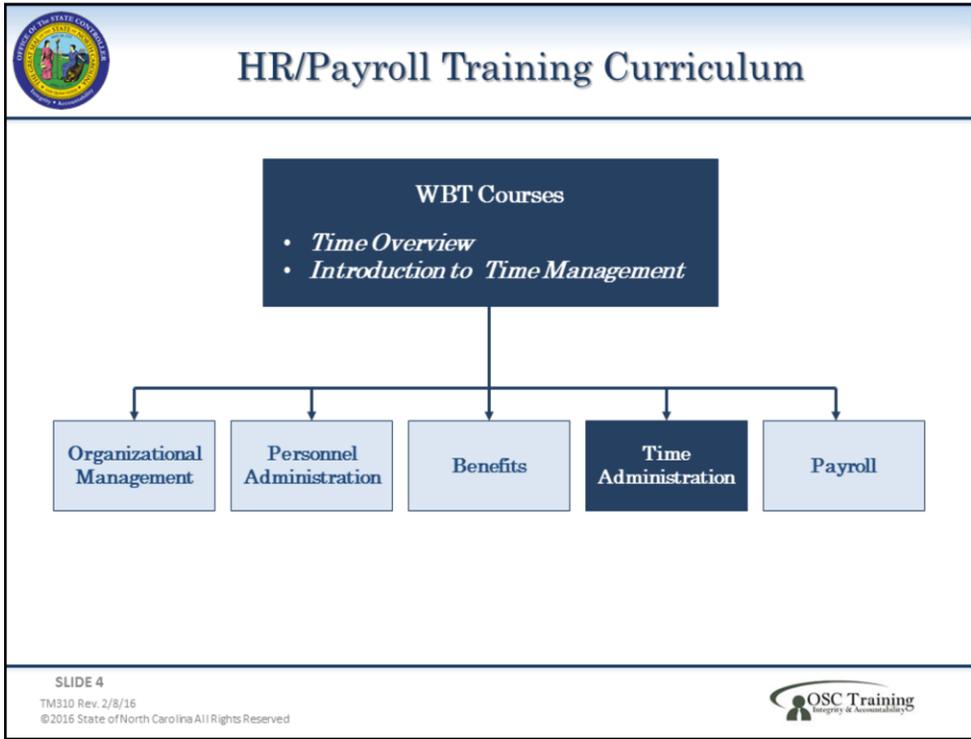
Prerequisites

- *Time Overview - TM200*
- *Introduction to Time Management - TM210*

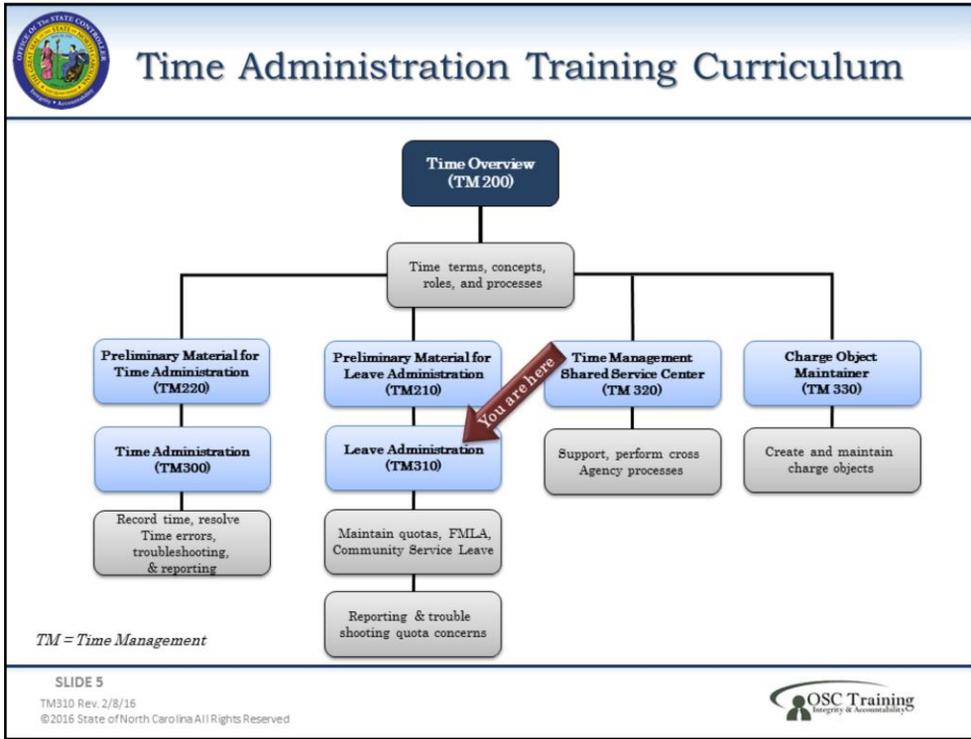
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There are two pre-requisites that you must take before attending this class. Attending or taking these pre-requisites ensures that you are prepared to learn the new processes, concepts, terms, and data entry skills that are covered in this course.



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



As noted in the pre-requisites, this class is preceded by the web-based course *TM210 – Introduction to Leave Administration*.



Strategy for Training

Tell me	<p>Concepts Your Instructor will describe the process, responsibilities and the transactions – LISTEN</p>
Show me	<p>Demonstrations Your Instructor performed in OSC HR/Payroll SAP – HANDS OFF will demonstrate job-related tasks</p>
Let me	<p>Exercises You will complete the exercises which allow for hands-on practice in class – HANDS ON</p>
Support me	<p>Availability Your Instructor will be available to answer questions while you complete the exercises</p>

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Reference/Online Materials

- Student Guide
- Job Aids (Working Weeks)
- Business Process Procedures (BPPs)
 - Step-by-Step Work Instructions
- Job Aids
- What's New

The materials above can be accessed through the OSC Training HELP website.
Use the following link to access the HELP website:
<http://www.osc.nc.gov/training/osctd/help/index.html>

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To access OSC Training online help, go to:

<http://www.osc.nc.gov/training/osctd/help/>



Reference/Online Materials

- BEST Shared Services Contact Information
- System Status & Updates
- Forms
- Support Materials
 - Payroll Calendars
- ESS/MSS Portal Access Link

The materials above can be accessed through the OSC BEST Shared Services website. Use the following link to access the website:
<http://www.osc.nc.gov/BEST/index.html>

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Course Map

- Lesson 1: Leave Administration Overview**
- Lesson 2: Quotas and Leave Management**
- Lesson 3: FMLA**
- Lesson 4: Reporting and Troubleshooting**

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Lesson Objectives - Overview

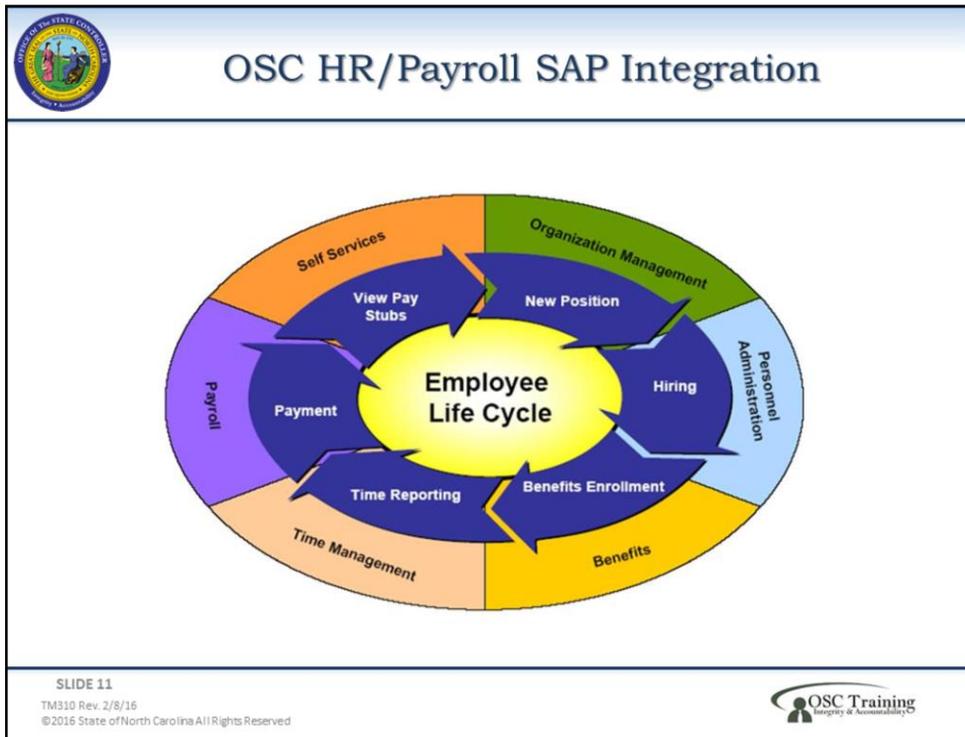
Upon completion of this lesson, you should be able to:

- Explain how information in other OSC HR/Payroll modules may affect time, payroll, and quotas
- List leave quotas in OSC HR/Payroll
- List key changes:
 - Leave Hierarchy
 - Leave Offsetting
 - Holiday Behavior
 - Time Evaluation

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This course is designed to provide you with knowledge and skills necessary to perform Leave Administration in SAP.



Because OSC HR/Payroll is an integrated system, entries made in one module affect other system components, such as an employee’s time and pay. The system is also a date driven system.

Some infotypes entered are tied directly to the employee, like work weeks, schedules, addresses, and tax withholding information. Other infotypes are applied to the position and affect things like how OSC HR/Payroll looks at holidays, overtime, and premium pay. OM, PA, BN, and TM settings all can affect an employee’s paycheck.



PA Infotypes

- IT0000 – Actions
- IT0001 – Organizational Assignment
- IT0002 – Personal Data
- IT0006 – Address (permanent)
- IT0007 – Planned Working time
- IT0008 – Basic Pay
- IT0041 – Date Specifications
- IT0552 – Time Specification/Employ. Period
- IT2003 – Substitution
- IT2001 – Absences
- IT2013 – Quota Corrections

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To understand some of the interconnection between OSC HR/Payroll modules, we need to look at how some of the infotypes from one area may affect processing in another. For example, the infotypes listed above are entered in PA, but affect an employee's time, benefits and payroll.

The next few slides give some details on some of these interconnections.

Actions - Infotype 0000

Display Actions (0000)

Pers.No. 10000042
 Name Kenneth Franklin Potter20
 EEGroup SPA Law Enforcement PersA 4705 CCPS-Highway Patrol
 EESubgroup 81 FT S-FLSAOT Perm
 Start 07/01/2012 to 12/31/9999 Chng 08/23/2012 01346009

Personnel action
 Action Type Salary Adjustment (IC)
 Reason for Action 22 Legislative Increase

Status
 Customer-specific
 Employment Active
 Special payment Standard wage type

Organizational assignment
 Position 600E5393 Trooper
 Personnel area 4705 CCPS-Highway Patrol
 Employee group 81 SPA Law Enforcement
 Employee subgroup 81 FT S-FLSAOT Perm

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action
07/01/2012	ZC	Salary Adjustment (IC)	22	Legislative Increase

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Time, Payroll and Benefits use information from IT0000.

- Actions IT (0000):** The **Actions 0000** infotype indicates the events that occurred on the employee’s personnel record. Some examples are: New Hire, Promotion, Range Revision, etc. In addition, the infotype shows the employment status (Active, Inactive, Withdrawn).

Organizational Assignment – Infotype 0001

Display Organizational Assignment (0001)

Org Structure

Personnel No: 10000042 Name: Kenneth Franklin Potter20

EEGroup: SPA Law Enforcement PersA: 4705 CCPS-Highway Patrol

EESubgroup: FT S-FLSAOT Perm Statu: Active

Start: 07/01/2012 to: 12/31/9999 Chng: 08/23/2012 01346009

Enterprise structure

CoCode: NC01 STATE OF NC

Pers.area: 4705 CCPS-Highway Patrol Subarea: NC08 7day Interface

Cost. Ctr: 4799999999 CCPS Bus. Area: 4700 Crime Control and Public...

Fund: 4799999999 CCPS-SUSPENGE

Func. Area: G000000000000001 General Government

Personnel structure

EE group: SPA Law Enforcement Payr.area: 01 NC Monthly

EE subgroup: FT S-FLSAOT Perm Contract: [dropdown]

Organizational plan

Percentage: 100.00

Position: 60085393 002020303145 Trooper

Job key: 30003101 Hwy Ptl Tr Highway Patrol Troop...

Org. Unit: 20010543 496000000152 CCPS SHP Troop F/DL

Org.key: 47054799999999

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Time, Payroll and Benefits receive information from **Org Assignment IT (0001)**. All of the fields on this infotype default from the position assigned to the employee.

- **Personnel area:** Used by Payroll to determine where wages and salaries are posted and from where they are paid.
- **Subarea:** Identifies various working schedules for Time Management rules.
- **Cost Center, Fund, Functional Area, Business Area:** Are related to Finance and Funding.
- **Employee Group:** Drives benefits eligibility, leave and pay calculations.
- **Employee Subgroup:** Defines work status (full time, part time) overtime rules, and impacts benefits.
- **Payroll area:** Determines the payroll cycle.
- **Work Contract:** Identifies if employee will pay full or partial cost for health insurance premiums.
- **Percentage:** Always 100%.
- **Position and Job:** The position to which the employee is assigned and the job that the position is related to.
- **Organizational Unit:** An entity within the organizational structure.

Display Personal Data (0002)

Personnel No 10000042 Name Kenneth Franklin Potter20
 EGroup B SPA Law Enforcement PersA 4705 CCPS-Highway Patrol
 EESubgroup B2 FT S-FLSAOT Prob Status Active
 Start 09/04/1984 To 12/31/9999 Changed on 08/23/2012 01346009

Display Addresses (0006)

Personnel No 10000042 Name Kenneth Franklin Potter20
 EGroup B SPA Law Enforcement PersA 4705 CCPS-Highway Patrol
 EESubgroup B2 FT S-FLSAOT Prob Status Active
 Start 04/01/2011 to 12/31/9999 Changed on 08/23/2012 01346009

Address

Address type Permanent residence
 Care Of
 Address line 1 123 Main St
 Address line 2
 City/county Wikesboro Wikes
 State/zip code NC North Carolina 28697
 Country Key USA
 Telephone Number 0

HR data

SSN 555-12-7421
 Date of Birth 09/04/1984
 Language English
 Marital Status Marr.

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Personal Data IT0002

Social Security number, Date of Birth and Marital Status

Addresses IT0006

Tax infotypes (Residence Tax, Work Tax Area, Unemployment State) are associated with IT0006 – permanent address. If IT0006 is skipped during the New Hire Action, the tax infotypes do not display, and the employee’s record will error out in payroll.

If the address information is incorrect:

- A separated employee does not receive his or her final paycheck.
- An employee may not receive W2s at the end of the year.

PA Infotypes 0007

Create Planned Working Time (0007)

Work Schedule Rule Example (D01N08GN)
 D = Days
 01 = Schedule number
 N = No weekends
 08 = Hours per day
 GN = General Schedule (common schedule)

Personnel No: 80000327 Name: Kumar, Re1
 EGroup: SPA Employees PersA: 4601 Cultu:
 ESubgroup: FT N-FLSAOT Perm Statu: Active
 Start: 08/15/2008 To: 12/31/9999

Work schedule rule	D01N086N	MTWHF-8,SaS-O
Time Mgmt status	1 - Positive Time Recording	
Working week	Wk - Sun (mdn) - Sat	
<input type="checkbox"/> Part-time employee		

Employment percent	100.00
Daily working hours	8.00
Weekly working hours	40.00
Monthly working hrs	173.33
Annual working hours	2080.00

Weekly working hours drives benefits

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Planned Working Time: The Work Schedule Rule (WSR) is the foundation on which an employee’s time is processed in SAP. Each employee is assigned a WSR that best represents his or her work pattern. The WSR combines an assigned holiday calendar (the main State holiday calendar or an alternate calendar approved by OSHR) with a repeatable pattern of work representing an employee’s scheduled work days and scheduled non-work days. The WSR can represent work patterns repeated over single or multiple weeks and may include day, evening, and night shift designations that trigger premium payments at rates designated for the employee’s position (as set for the position in OM).

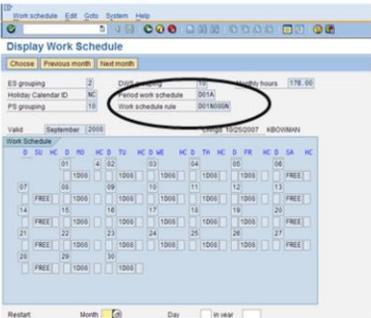
The WSR does not limit the number of hours an employee may record on any given day, but only allows leave to be taken on scheduled work days. Many fields trigger other time functions. For example, Time Sheet Defaults, IT0315 (from PA20) are directly related to the Time Management Status field on IT0007. A Time Mgmt Status of 1 indicates that a time sheet is required, and 9 indicates a Time Sheet is not required (positive time or negative time). If a negative time employee is on Leave of Absence, IT0007 must be revised to change the employee to positive during the Leave and changed back to negative on Reinstatement.

Negative time employees should be employees who work 5 days a week, 8 hours a day.



Planned Working Time – Effect on Pay

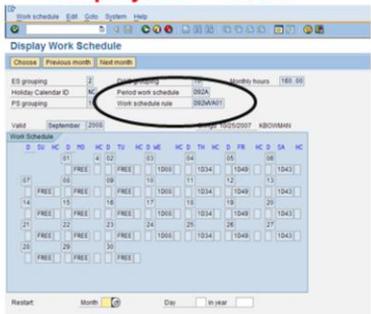
Employee A – IT0007



Pay formula:
of days worked in schedule
Divided by # of possible work days in schedule
Times the monthly pay amount

Employees start work on same day
Employees get same monthly rate
Employees receive different pay
because of work schedules
assigned

Employee B – IT0007



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Example of IT007 Impacts Employee’s Pay

This example describes two employees hired on the same day but given two different work schedules. Both employees are paid \$6,250 monthly salary.

Employee **A** starts on Sept 19 and is assigned work schedule D01N08GN which has 22 possible work days in the month. Counting Sept. 19th, the employee worked 8 days of the possible 22. The pay is figured by this formula: 8 days divided by 22 times the monthly rate (\$6,250) = \$2,272.73 paid for the month for Employee A (based on IT0007 and IT0008).

Employee **B**'s work schedule (D92WVA01) has 16 possible work days in the month. Counting the first day Employee B reported to work (9/19), the employee worked 6 out of the 16 days. The number of days worked (6) divided by the possible work days (16) times the monthly salary (\$6,250) calculates a pay of \$2,343.75.

You can see that both employees were paid correctly, yet the specific work schedule, and Basic Pay (IT0008), determined two different pay amounts. This shows how schedules entered in PA can affect employee pay. Note that, unless the employee has a significant number of days without pay (A/A Type 9400), this discrepancy would only affect the first and last months that an employee is on a certain schedule.



PA Infotypes - 0008

Display Basic Pay (0008)

 Salary amount
 Payments and deductions

Personnel No Name

EEGroup SPA Employees PersA Cultural Resources

EESubgroup FTN-FLSAOT Perm Statu

Start to Chng ECATT

Subtype Basic contract

Salary		Capacity Util. Level	<input type="text" value="100.00"/>
Reason	<input type="text" value="Z0"/> New Hire	Work hours/period	<input type="text" value="173.33"/> Monthly
PS type	<input type="text" value="01"/> Graded	Next increase	<input type="text"/>
PS Area	<input type="text" value="01"/> Annual Salaries	Annual salary	<input type="text" value="35,500.00"/> USD
PS group	<input type="text" value="GR68"/> Level <input type="text" value="GR"/>		

Wa	Wage Type Long Text	O	Amount	Curr	I	A	Number/Unit	Unit
1000	Regular Salary		2,958.33	USD		<input checked="" type="checkbox"/>	0.00	

Reason field must be entered

Other fields default from position

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Basic Pay: Salary or hourly wages

The **Salary Amount** button does not calculate correctly for DOT employees, but does calculate for all non-DOT wage types. You must manually enter information in the Reason field during the Action. The remaining IT0008 fields default from the PCR for a salaried employee. In the case of an hourly employee, you must enter the hourly wage in the Amount field.

You would seldom make an entry directly on IT0008. Most of the adjustments involving an employee’s pay would result from an Action. However, one example of when it is appropriate to make a direct adjustment to IT0008 is when an employee returns to work part-time while receiving partial Worker’s Comp.

Display Date Specifications (0041)

Personnel No: 80000336 Name: Kumar Reinaldo11

EEGroup: A SPA Employees PersA: 4601 Cultural Resources

EESubgroup: A1 FT N-FLSAOT Perm Status: Active

Start: 01/01/2008 to 12/31/9999 Chng: 06/09/2008 ECATT

Date type	Date	Date type	Date
01 Original Hire Date	01/01/2008	02 Agency Hire Date	01/01/2008

DT* Date type

- 01 Original Hire Date
- 02 Agency Hire Date
- 03 Last Day Worked
- 04 Judicial Anniv Date
- 06 Notification of RIF
- 07 Lottery Anniv Date
- 08 SupplementalHireDate
- NR 457 Catch-Up Date

8 Entries found

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Date Specifications IT0041

Two useful reports to use for Date Specifications are the following:

- Transaction ZEMP
- PT_BAL00



PA Infotypes – 0041 (Continued)

Action	Defaulted Dates Types (Agency may change date based on OSHR/Agency Policy/Guidelines)
Z0 - New Hire	01 – Original Hire Date
Z7 - Non-Beacon to Beacon	02 – Agency Hire Date
ZS – Adjusted Hire Date	04 – Judicial Anniv Date (for specific Judicial Jobs)
ZG - Separation	03 – Last Day Worked (defaults date from PCR)
Z2 – Reinstatement/Reemployment (from LOA)	Copies existing date types with effective date of action. Agency can change date types if required.
Z2 – Reinstatement/Reemployment (from Separation)	02 – Agency Hire Date 04 – Judicial Anniv Date (for specific Judicial Jobs) 07 – Lottery Anniv Date (All of Lottery except Temps)
Z8 – Transfer (within Agency)	Copies existing date types with effective date of action. Agency can change date types if required.
Z8 – Transfer (Agency to Agency)	02 – Agency Hire Date 04 – Judicial Anniv Date (for specific Judicial Jobs)
Z8 – Transfer (Temp to Perm)	01 – Original Hire Date 02 – Agency Hire Date 04 – Judicial Anniv Date (for specific Judicial Jobs)

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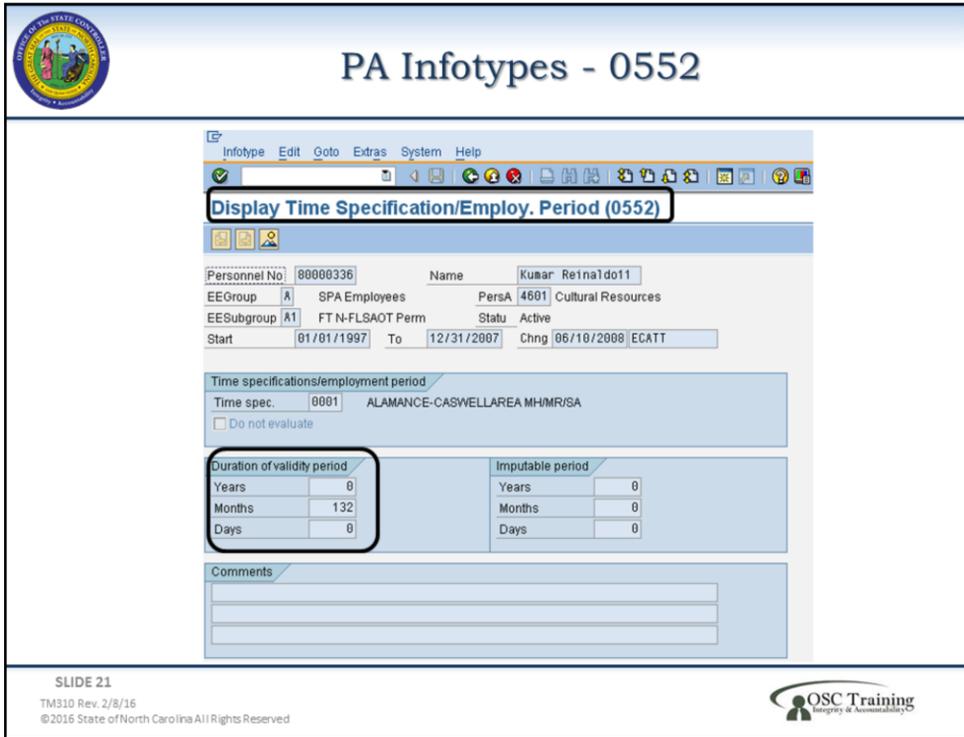
Date Specifications IT0041

NOTE: For AOC, time evaluation bases longevity payments for employees that are eligible for monthly longevity on date type 04.

NOTE: IT0041 was created November 1, 2013 for all Supplemental Staff.

❌ CRITICAL!

Use caution when adjusting the validity dates of the copied record. If the validity dates are set to dates in the past, then the dates will be used in any retro-calculations triggered by Time Evaluation. If the only change to the record involves adding another date type, then use the current date as the new validity From date and 12/31/9999 as the new validity To date.



Time Specification/Employ. Period IT0552

Creditable service earned prior to SAP must be entered on IT0552. Once an employee is entered into SAP, the system automatically calculates service and longevity dates using the Time module. If HR makes changes to IT0552 that affect the longevity date, SAP takes back any money already paid out and repays based on the new longevity date. If you make a change on IT0552, you must email BEST with the name of the employee. Do not adjust the original IT0552 entry from conversion. If an employee has creditable service from more than one organization, enter additional IT0552s to add the additional organizations, rather than extending the date on the original IT0552 to include the additional service dates.

Two useful reports to use for Date Specifications are the following:

- Transaction ZEMP
- PT_BAL00

Refer to the BPP for Shift Substitutions found at:
<http://www.osc.nc.gov/training/osctd/help>
 Time Management > BPPs > PA61 Shift Substitutions

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The Substitution IT2003 is used to indicate that the employee is working something other than his or her regular schedule. Substitutions may be daily or for weeks at a time. IT0007 – Planned Working Time is overwritten with the properties of the Substituted schedule. Some examples include:

- An employee is working at a time other than his or her planned work schedule. For example: employee works on day off, or works on a shift that has a different premium (or has no premium) than his or her usual shift

Substitution is only used when the work schedule change is temporary. If the employee will be permanently assigned to a new schedule, use IT0007 to change the Work Schedule Rule appropriately.

The **PA61 Shift Substitutions** BPP is located in the Time Management folder on the OSC Training HELP website.

<http://www.osc.nc.gov/training/osctd/help/index.html>

Absences - Infotype 2001

Personnel No: 80000756 Name: Nancy Gonzalez
 EE group: SPA Employees Personnel ar: 4601 Cultural R:
 WS rule: D01N086N MTWHF-8,SaS-O Status:
 Start: 2/03/2008 To: 1/27/2008

Absence

Absence type: 9000 Approved Leave
 Time: - Prev day
 Absence hours: 24.00 Full-day
 Absence days: 3.00
 Calendar days: 5.00
 Quota used: 24.00 Hours

Subtypes for infotype "Absences" (1) 15 Entries found

PSG	AIAty	Att.labs. type text
10	9000	Approved Leave
10	9200	Sick Leave
10	9300	Holiday Leave
10	9400	Leave without Pay
10	9540	Other Mgmt Approved Leave
10	9545	Adverse Weather
10	9547	Communicable Disease
10	9550	Civil Leave - Jury Duty
10	9560	Community Service Leave
10	9565	Community Svc-Tutoring
10	9570	Educational Leave
10	9620	Military Training Leave
10	9630	Military Active Duty
10	9680	Injury Absence W/C
10	9685	Injury Leave

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The Absences infotype (IT2001) indicates the number of hours the employee wants to exhaust for leave while on Leave of Absence or the number of hours the employee is taking unpaid leave (9400). When the dates are entered, the hours that default are based on the work schedule rule entered on the Planned Working Time infotype (IT0007) which was created as part of the LOA Action.

Because SAP is integrated, the hours entered on the Absences infotype are processed during the next time evaluation. A time sheet **should not** be created.

As long as the employee is receiving pay (leave or work), benefits continue to be deducted. If not receiving pay, the employee must pay for benefits or discontinue them.

The **Updating Absence Deduction** job aid is located in the Time Management folder on the OSC Training HELP website.

<http://www.osc.nc.gov/training/osctd/help/index.html>

The SAP system automatically manages an employee's accruals of various quotas, including Sick, Vacation, Community Service and Military leave (if applicable). The SAP system will also systematically manage deductions to these quotas, holidays, etc. There are only a few special circumstances that require manual adjustments to an employee's quota balances. The Quota Adjustments infotype (2013) is used to manage adjustments to an employee's quotas.

When there is an EE separation action- the vacation quota is paid out through the use of IT0416 maximum of 240 hours. Any remaining vacation quota is zeroed out by using IT2013 subtype 10. The Leave Administrator will receive notification when to process the remaining balance of vacation quota.

The **PA61 Quota Adjustments** BPP is located in the Time Management folder on the OSC Training HELP website.

<http://www.osc.nc.gov/training/osctd/help/index.html>



Position Infotypes – Employees and Time

Position flags set on specific infotypes also affect employee time and pay:

- Overtime Compensation – IT9005
- Holiday Payout Period – IT9006
- Night Shift Premium – IT9007
- Evening Shift Premium – IT9008
- Weekend Shift Premium – IT9009
- Holiday Premium Rate – IT9010
- On-Call – IT9011
- Callback – IT9012
- Gap Hours Comp – IT9017

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HR personnel with access to PO13 will update the above infotypes for a position. If the position infotypes for the types of pay are not flagged correctly, even if hours are entered, released, and approved, the employee will not receive the correct pay.

If you **revise** a **position** setting that is **retro** to a pay period before the current pay period, you **must contact BEST Payroll** to let them know to run time evaluation on the affected employees retro to that same time period. You only need to contact BEST Payroll if you revise a position. If you revise time for an employee, SAP automatically runs time eval and adjusts the time records.

NOTE: If a position is revised, an email should be sent to BEST Shared Services. In the subject line, type “Retro Time Evaluation.”

Overtime Compensation

Infotype Edit Goto View System Help

Create Overtime Compensation

Position 800904000836 Museum Specialist
 Planning Status Active
 Validity 08/20/2008 to 12/31/9999 [Display change infor](#)

Overtime Compensation 01 S 65001751 1

OT Compensation Eligible
 Immediate Payout OR Comp Aging Limit 365 Days

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Overtime Compensation (IT9005)

If time worked beyond the overtime limit (40 hours, etc.) is to be paid or accumulated as compensatory time, the position must have a valid IT9005 record. If overtime compensatory time is to be paid out (FLSA Subject only) or expired (FLSA Not-subject only) at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). If it is to be paid out immediately, the Immediate Payout checkbox should be checked. The default is 365 days. The setting on IT9005 works with IT2012 (discussed later) determine the rules for overtime compensation.

As indicated previously, an employee may have worked more than 40 hours and entered and released the time. Even if the time is approved by the manager, if the Overtime Compensation infotype is not flagged correctly for the position, the employee will not receive overtime compensation. An IT9005 record is not required if the position is not eligible for overtime pay or compensation.

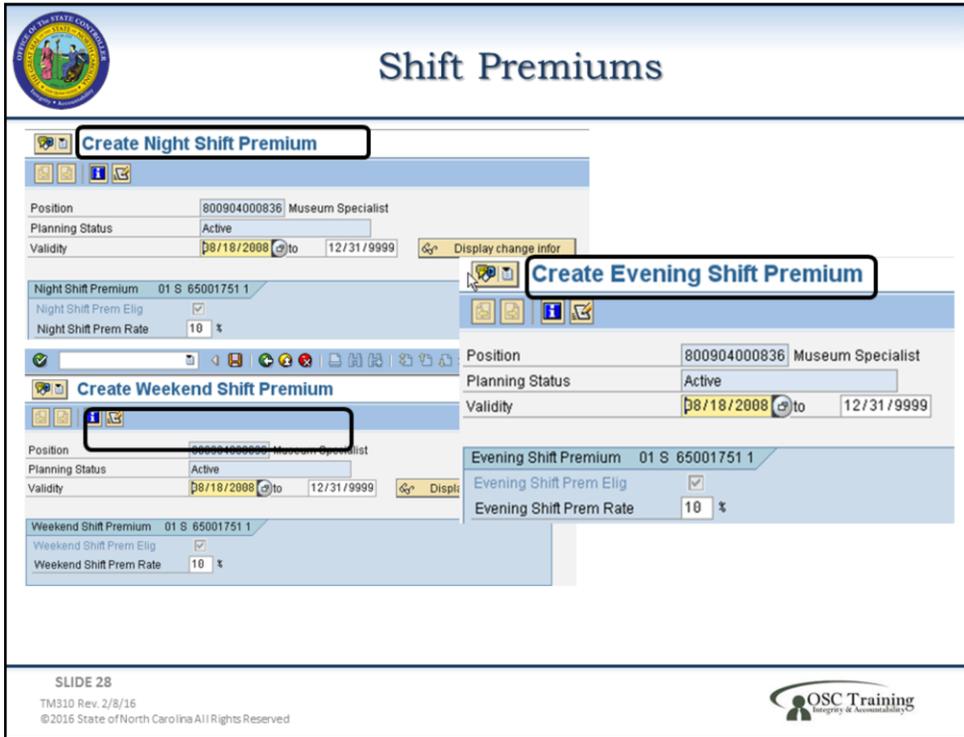
For more information regarding Overtime Compensation, please refer to the OSHR Policy: [Hours of Work and Overtime Compensation](#).

Holiday Payout Period (IT9006)

If holiday compensatory time (equal time off for time worked on a holiday) is to be paid out at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). If it is to be paid out immediately, the Immediate Payout checkbox should be checked.

The default is 365 days. If no record exists, the default value of 365 applies.

For more information regarding Holiday Payout, please refer to the OSHR Policy: [Holiday Premium Pay](#).



Positions eligible for any of the premiums listed below must have valid infotypes.

Night Shift Premium (IT9007)

OSHR approved rates other than the default of 10% must be entered in the Rate field.

Evening Shift Premium (IT9008)

OSHR approved rates other than the default of 10% must be entered in the Rate field.

Weekend Shift Premium (IT9009)

OSHR approved rates other than the default of 10% must be entered in the Rate field.

You may review the PT66 report to see the shift premium rates that have passed to the position the 1st of each month.

For more information regarding Shift Premium Pay, please refer to the OSHR Policy: [Shift Premium Pay](#).



Shift Premiums

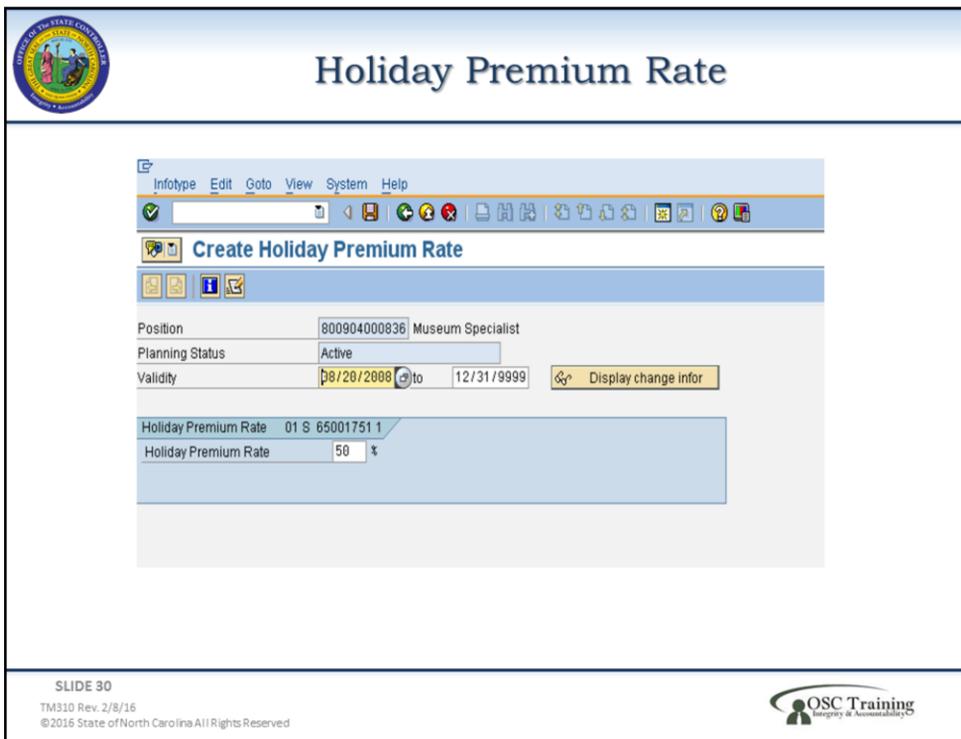
Pay Period: 01/01/2016 through 01/31/2016 Name: [REDACTED] Personnel No: [REDACTED]
 Check Date: 01/29/2016 Organization: [REDACTED]

	Earnings	Deductions	Taxes	Net Pay	Deductions	Current	YTD
Current:	2,964.95 -	179.98 -	650.36 =	2,134.61	# BYUP 80/20 FT	14.20	14.20
YTD:	2,964.95 -	179.98 -	650.36 =	2,134.61	# BYUP 80/20 HA Credit PT	15.00-	15.00-
					# BYUP 80/20 PCP Cred PT	15.00-	15.00-
					# BYUP 80/20 NS Credit PT	20.00-	20.00-
					** Total Health Insurance	35.80-	35.80-
Earnings		Hours	Current	YTD			
Regular Salary			2,849.17	2,849.17	# NC Flex Life Ins FT	1.00	1.00
** Total Base Pay			2,849.17	2,849.17	* TSERS EE	177.90	177.90
Shift Premium 10%		8.00	13.12	13.12	NC Flex Dental-AT	36.88	36.88
Shift Premium 15%		20.25	50.02	50.02	** Total Other Deductions	215.78	215.78
Shift Premium 20%		16.00	52.64	52.64			
** Total Other Pay			115.78	115.78	Total Deductions	179.98	179.98
Total Earnings			2,964.95	2,964.95			

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The various types of premium pay display as separate line items on the employee’s pay stub only if the rates are different. For example, if an employee’s evening and night shift are both 10%, the hours worked in the evening and night are together on one *Shift Premium* line item on the pay stub. On the other hand, as shown above, if the weekend rate is 10%, the evening rate is 15% and the night rate is 20%, the hours worked for the different shifts are shown in three separate line items on the employee’s pay stub.



Holiday Premium Rate (IT9010)

IT9010 is only required if the Holiday Premium Rate is different than 50%.

OSHR approved rates other than the default of 50% must be entered in the Rate field.

For more information regarding Holiday Premium, please refer to the OSHR Policy: [Holiday Premium Pay](#).

On-Call (IT9011)

Positions eligible for On-Call compensation must have a valid IT9011 record.

The accrued box should be checked if the time is to be collected as On-Call comp time. The Rate field must be populated with the OSHR approved on-call rate.

For every eight (8) hours worked, you will accrue 1 hour of on-call comp.

For more information regarding On-Call, please refer to the OSHR Policy: [On-Call and Emergency Callback Compensation](#).

.

Callback

Create Callback (9012)

Position: 100000008440 Facility Maintenance Tech - Mech Trades
 Planning Status: Active
 Validity: 01/01/2013 to 12/31/9999 Display change infor

Callback: 01 S 60014672 1

Callback Eligibility:
 Immediate Payout: OR Comp Aging Limit: 365 Days

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OSC Training
 Integrity of Accountability

Callback (IT9012)

Positions eligible for Callback compensation must have a valid IT9012 record. The decision to pay versus accrue comp time is determined by the Immediate Payout checkbox.

Positions eligible for Callback receive a minimum of two (2) hours compensatory time or additional pay at straight time rate for each call back incident.

For more information regarding Callback, please refer to the OSHR Policy: [On-Call and Emergency Callback Compensation](#).

Gap Hours IT9017

Positions eligible for Gap Hours Comp must have a valid IT9017 record. The decision to pay versus comp time is determined by the Gap Hours Accrual checkbox.

Gap Hours are additional hours for Subject- FLSA employees. The “Additional hours” are those hours caught in the gap between the minimum hours of work required and the overtime threshold. These hours are currently being paid at an hour-for-hour rate for Subject-FLSA employees.

For more information regarding Gap Hours Comp, please refer to the OSHR Policy: [Hours of Work and Overtime Compensation](#).



IT2012 – Time Transfer Specifications

Subtype	Name	Description
Z009	First 10 Hours Comp	Forces the first 10 hours (over the min. required work hours) to go to the Comp Time quota, and anything over that to be paid
Z020	Immediate Payout (OT)	Turns on Immediate Payout for OT for a specific date range
Z031	Non-Faculty	Flags NCSSM personnel for unique rules
Z032	Faculty	Flags NCSSM personnel for unique rules
ZAWA	<i>Makeup Adv Wthr w/App Lv</i>	<i>Used to capture AW with Approved Leave (< 7/1/2015)</i>
ZAWL	<i>Makeup Adv Wthr w/LWOP</i>	<i>Used to capture AW with LWOP (<7/1/2015)</i>
ZAWR	Makeup Adv Wthr	Used to capture AW with Approved Leave then LWOP, if needed. (≥7/1/2015)
ZAWB	Makeup Adv Wthr f/ Bonus	Used to capture AW with Bonus Leave then LWOP, if needed. (≥7/1/2015)

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The Time Transfer Specifications infotype (IT2012) can be used to influence time management behavior and is typically applied to an employee by the HR Master Data Maintainer or the Leave Administrator. Infotype 2012 records are created for specific employees for specific periods of time.



Terms and Concepts

- Quota
- Quota Type
- Cross Application Time Sheet (CATS)
- Attendance/Absence Type (A/A Type)
- Positive Time or Negative Time
- Time Evaluation

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Quota – A balance reflecting an employee’s entitlement for Leave

Quota Type – 2 digit code in SAP that indicates the type of quota. e.g., sick (15), holiday comp time (22)

Cross Application Time Sheet (CATS) – Acronym in SAP for the time sheet used by Time Administrators and Leave Administrators to enter or correct time

Attendance/Absence Type (A/A Type) – A code that reflects the nature of an employee’s absence or attendance. Absence codes are for time off – sick, vacation, bonus, etc. Attendance codes reflect time worked - regular work, hours, make up time, etc.

Positive Time or Negative Time – Describes the requirement to enter all time worked and leave taken (Positive time), or to record exceptions from their normal work schedule only (Negative time)

Time Evaluation – The Nightly Time Evaluation Run processes time rules and readies approved time for use for Payroll processing.



Quota Types

Quota Type	Quota Text
10	Vacation Leave
15	Sick Leave
20	Overtime Comp Time
21	Gap Hours
22	Holiday Comp Time
23	Callback Comp Time
24	Travel Compensatory Time
26	On Call Comp Time
27	Emergency Closing Comp Time
29	Incentive Leave
31	Advanced Vacation Leave
32	Advanced Sick Leave
40	Holiday Leave
50	Bonus Leave
61	Adv weather # hours owed
65	Community Service Leave
66	Community Service - Tutoring
67	Literacy Volunteer Leave
80	Received Shared Leave
85	Military Leave (Training)

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Specific descriptions follow on the next pages.

Holiday Leave is the holiday that is due in the next 60 days, for positive time employees. A holiday absence will reduce the amount in the Holiday Leave Quota. Negative Time employees will not see a Holiday Quota.

Holiday Comp is earned when an employee works on a holiday or if the employee does not record and approve the holiday leave within 30 days of the holiday. At that time, the system automatically moves the Holiday Leave to Holiday Comp Leave.



All absences recorded as **'9000 - Approved Leave'** will be subject to this **Leave Hierarchy**. The Leave Hierarchy reflects the order in which leave balances will be deducted when an entry for an Approved Absence is approved and transferred at night. At the point of entry, the quotas are checked in succession until enough quota is found to cover the recorded absence. The system will only return a message 'no quota available' if it has checked each bucket and not found a balance to cover the absence.

The quotas will be automatically deducted in this order.

- 1) Holiday Comp
- 2) OT Comp
- 3) Gap Hours
- 4) Callback Comp
- 5) On-Call Comp
- 6) Travel Comp
- 7) Emergency Closing Comp
- 8) Incentive Leave
- 9) Vacation
- 10) Advanced Leave

For more information regarding Vacation Leave, please refer to the OSHR Policy: [Vacation Leave](#).



Hierarchy – Sick Leave

A/A Type
9200



1. Sick Leave

2. Voluntary
Shared Leave

3. Advanced Sick
Leave

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The **Sick Leave Hierarchy** represents the order in which the system will deduct quotas when an entry of 9200 is recorded. Like the Approved Leave Hierarchy, the quotas are checked at the point of entry, and the quotas are deducted when time is approved and transferred.

For more information regarding Sick Leave, please refer to the OSHR Policy: [Sick Leave](#).



Positive vs. Negative Time

Employees entering time will be classified as either positive or negative time.

Employee Time Reporting Type	Description
Positive time/exception pay	Employees record all of their time worked and all of their exceptions such as leave taken each month. Employees will receive base pay.
Positive time/actual pay	Employees record all time worked and are paid based on actual time recorded. This applies to Temporary Employees and DOT.
Negative time	Employees only record variations from their normal schedule, such as leave taken. Only employees “not-subject to FLSA” can be negative time.

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It is important to recognize the distinction between actual and exception pay.

Actual pay – Employee only receives pay for time reported. If no time is reported then no pay is received. Temporaries and NCDOT employees are actual pay.

Exception pay – Employee receives full pay unless Leave Without Pay are reported.

Positive time reporting – Always applies to all employees subject to Fair Labor Standards Act (FLSA).

Negative time reporting – Can only apply to employees that are exempt from FLSA. Only exemptions have to be reported.

📁 **NOTE:** Exempt employees can be set as Positive time reporting. This may be necessary to maintain a consistent agency-wide time reporting structure.



Leave Offsetting

THE RULE:
Leave is to cover the time between hours worked and the minimum expected work hours.

When Approved Leave is taken in the same reporting period where the employee has worked additional hours, the amount of leave taken will be offset with the additional work hours, and the leave that had been recorded will be restored to the employee's quota for later use.

Example: A Positive Time employee with a normal 5 X 8-hour work schedule works 4 ten-hour days and takes 8 hours of leave on Friday. In this scenario the 8 hours of leave will be restored to the employee's Approved Leave quota and the employee will be paid for 40 hours.

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For more information regarding Leave Offsetting, please refer to the OSHR Policy: [General Leave Policies – Leave Offsetting](#).

The best practice to ensure correct offsetting is to record all hours worked and then use leave to fill in the difference between actual hours and required hours.

Quotas with established limits will be offset, except for holiday, civil and other management approved leave.

Entries made for Leave in excess of the minimum required work hours will automatically be restored to the employee’s leave quota balances.

Leave restoration will be *first taken, first restored*. If a weekly employee takes Approved Leave on Monday, and then a day of Sick Leave on Tuesday, and then works an extra 8 hours on Wednesday, the Approved Leave from Monday will be the first to be restored.

NOTE: Leave Offsetting is done within an Overtime (OT) period. For normal, 40-hour, subject personnel, Leave Offsetting will be done within the 7-day OT period. For 28-day employees, the entire 28-day period is subject to offsetting.

Holiday Leave

July 4th

30 days 30 days

A/A Type
9300

----TAKE A DAY OFF SOMEWHERE IN HERE AND CHARGE 9300----

Positive Employee will see 8 hours added to their Holiday Leave quota 30 days prior to July 4th.

If not taken, Employee will see that the Holiday Leave balance will no longer reflect the 8 hours of leave as of the 30th day after the Holiday, August 3rd.

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Bureary of Accountability

Positive Time Employees

- Will see holiday leave is displayed in their quotas 30 days before the holiday
- May take the holiday from that date forward, not to exceed 30 days after the holiday
- May observe the holiday on the day it naturally occurs. This 60- day holiday period is designed to provide flexibility for agencies with 24x7 operations.
 - If the holiday falls on a regularly scheduled work day and the employee is off, the employee should record 9300, Holiday Leave.
 - If the employee works on the Holiday, the employee will record work hours, will receive equal time off, up to 8 hours, and the relevant holiday premium pay. The Holiday Leave (9300) will be converted to Holiday Comp Time and placed in the appropriate Leave quota.
 - If the holiday falls on a non-scheduled work day, the employee may record their holiday leave (9300) on another day, an absence they should arrange with their supervisor.



Holiday Leave *(continued)*

July 4th





30 days

30 days



A/A Type
9300

----TAKE A DAY OFF SOMEWHERE IN HERE AND CHARGE 9300----

Positive Employee will see 8 hours added to their Holiday Leave quota 30 days prior to July 4th.

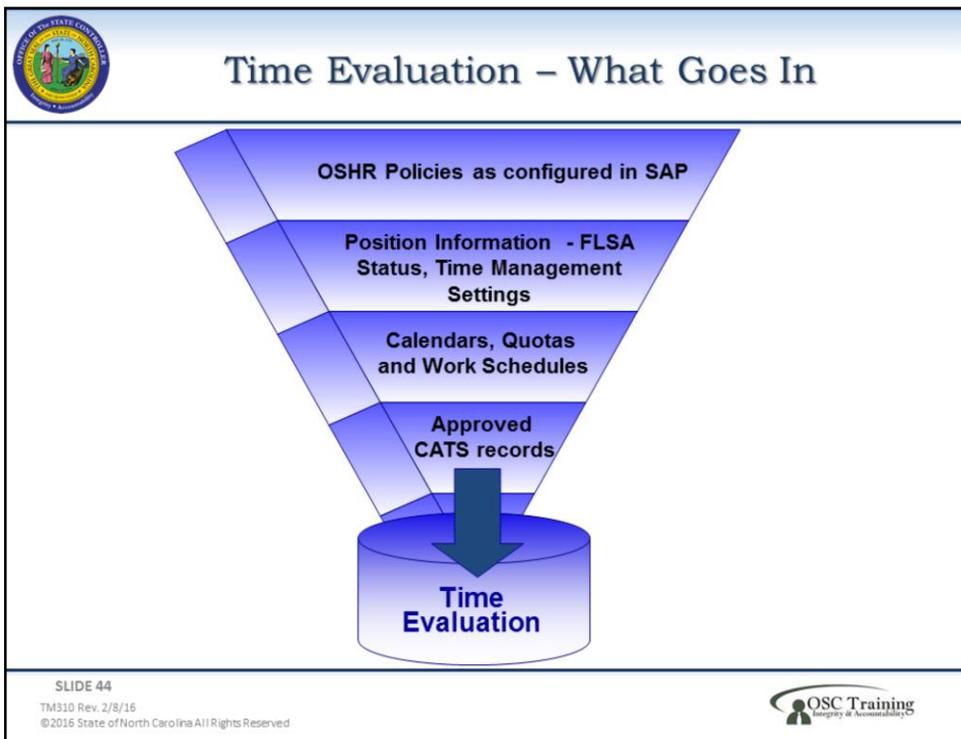
If not taken, Employee will see that the Holiday Leave balance will no longer reflect the 8 hours of leave as of the 30th day after the Holiday, August 3rd.

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Non-FLSA Subject employees who record exceptions only:

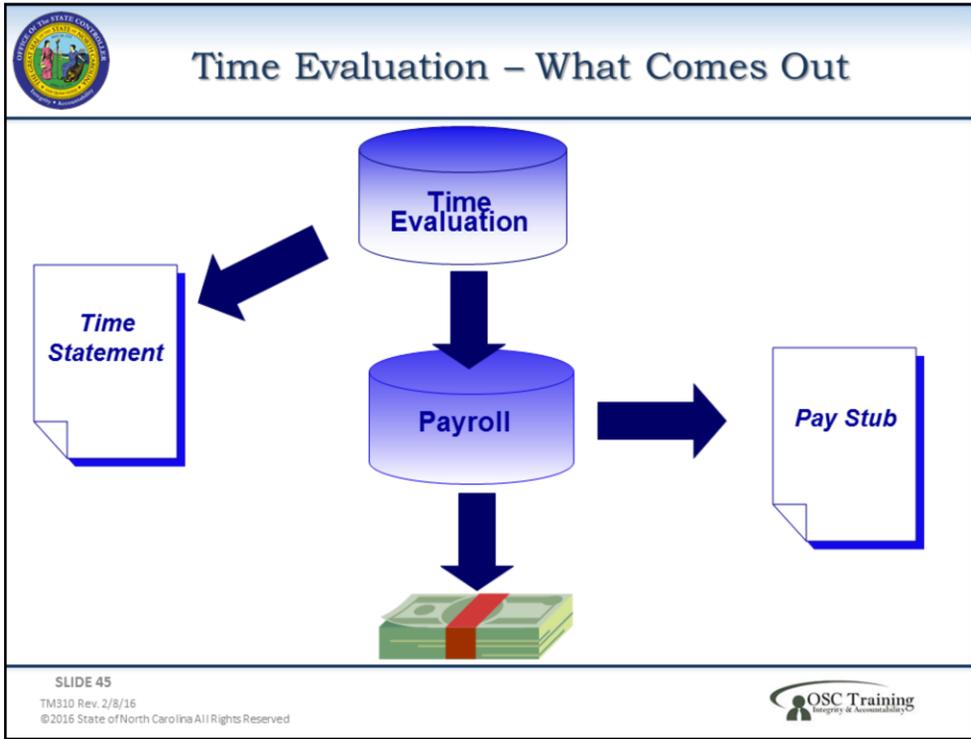
1. The only exception for these employees is if they **WORK** on the holiday. Otherwise, it will be assumed that they had the benefit of the holiday.
2. Some agencies allow the employees who normally work 4x10 to revert to a 5x8 schedule in the week of a holiday. This will not require a change to the employee’s work schedule.



Time Evaluation determines:

- OT/Comp Time
- Premium Pay
- Leave Offsets
- Recovery of outstanding liabilities

Payroll picks up Time Evaluation results and generates pay checks.



Exercise 1.1

Log On To SAP

- You need to log on to the SAP training client so that you can complete course exercises.



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Refer to your exercise guide for step-by-step instructions for this walkthrough.

1.1 - Walkthrough – Log On To SAP



Scenario

You need to log on to the SAP training client so that you can complete course exercises.

Instructions

Use the steps and date provided below to log on to SAP in the classroom.

1. Access the SAP portal web page using the following web address:
 - a. <https://trg-mybeacon.nc.gov>
2. Enter the User ID and password that is assigned to your classroom PC.
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.

Favorites to add:

PA61

PT50

CATS_DA

PTFMLA

ZNCTIME



Knowledge Check

1. True or False – Vacation is used before Comp time in the Leave Hierarchy.
2. True or False – SAP automatically deducts approved leave based on the new OSHR leave hierarchy policy.
3. True or False - Holiday Leave (A/A 9300) must be recorded by all employees
4. True or False - Positive Time employees get their holiday leave 30 days in advance.
5. What is the infotype used to enter quota adjustments?
6. VSL will pull from which hierarchy?
7. When does offsetting occur?
8. Are approved CATS records considered in the time eval process?
9. GAP hours will pull from which hierarchy?
10. What two infotypes will give you information concerning creditable service?

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Lesson Review

In this lesson, you learned to:

- Explain how information in other OSC HR/Payroll modules may affect time, payroll, and quotas
- List leave quotas in OSC HR/Payroll.
- List key changes:
 - Leave Hierarchy
 - Leave Offsetting
 - Holiday Behavior
 - Time Evaluation

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Course Map

- Lesson 1: Overview
- Lesson 2: Quota and Leave Management**
- Lesson 3: FMLA
- Lesson 4: Reporting and Troubleshooting

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Lesson Objectives

Upon completion of this lesson, you should be able to...

- View quotas (PT50)
- Modify quota balances (PA61)
- Describe Community Service Leave in SAP
- Convert quota from CSL to CSL-Tutoring or Literacy Volunteer Leave
- Describe Voluntary Shared Leave process at a high level

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Quota Accruals

Who accrues?

- Employees with a employer/employee non-temporary relationship with the State

When do Employees Accrue?

- Positive time employees must record time worked or leave for 50% of their scheduled work days in the pay period to accrue in that period. The accrual date depends on the number of work days, as derived from the employee's work schedule.

What counts for accrual?

- Any approved entry that puts the employee in a pay status for that day will count towards the 50% achievement.

What do they accrue?

- Hours and minutes, in decimals

What is prorated?

- Annual Leave and Sick Leave are prorated for part-time employees. Community Service leave is prorated for new hires starting after mid-January.

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The accrual date depends on the number of work days, as derived from the employee's work schedule.

For example:

An employee works 5 days a week.

There are 21 work days for this employee, on this work schedule, in the current month.

The employee would accrue his leave when time is entered and approved through the 11th workday of the month .

Employees with intermittent LWOP could conceivably accrue later in the month.

Any approved entry that puts the employee in a pay status for that day will count towards the 50% achievement.

NOTE: Only time entries that place the employee in a pay status are counted toward achievement of 50%. Any entry for Leave without pay (LWOP – A/A type 9400) will delay the accrual of leave until the employee meets 50% of the period in a pay status.



Accruals – When and How

THE RULE:
An employee will accrue their leave when they have achieved 50% of their payroll period.

Employees who are Positive Time must demonstrate that achievement by recording time

Employees who record only their exceptions (Negative Time) will receive their accruals based on their planned Working Time

📁 **NOTE:** OSC HR/Payroll recommends weekly time entry to ensure timely and accurate accruals. Agencies adopting monthly entry deadlines for their Positive Time Recording population will see a delay in the monthly accruals.

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Quotas – Recording Leave

- Employees accrue leave when the time has been earned based on approved timesheet entries. Leave may not be taken before it is earned. Time must be entered, approved and evaluated before the accrual will be done.
- Leave earned on the 15th day may not be applied to an absence on the 10th.
- Leave Administrators have the responsibility to research Quota problems and make appropriate adjustments.

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📁 **NOTE:** Notes should always be made in the system for all adjustments and a good explanation of why the adjustment is being made. Leave is deducted from available quota balances.



Advanced Leave

- Agencies may elect to Advance leave in accordance with OSHR Policy. Typically this is rare and for a specific purpose.
- A Leave Administrator, with management approval, would create an Advanced Leave Quota entitlement for the hours awarded.
 - Quota 31 = Vacation
 - Quota 32 = Sick
- The Advanced Leave Quota will be consumed when the employee records an absence that deducts from that Quota.
- The system will generate a Liability for the employee based on the hours taken. It will automatically recover future accruals towards that liability until it is satisfied.
 - If the liability is not satisfied by the end of the calendar year, an IT2012 record will be implemented by the Agency Leave Administrator.
 - For further information, you may refer to the Advanced Leave BPP located in the Time Management folder on the OSC Training HELP website.
<http://www.osc.nc.gov/training/osctd/help/index.html>
- The Advanced Leave Request form is available online.

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Advanced Leave is subject to the limits in the OSHR Policy manual.

The recovery of liabilities is reflected on the Time Statement and recovered by December 31 each year.

For more information regarding Advanced Vacation Leave, please refer to the OSHR Policy: [Vacation Leave](#).

For more information regarding Advanced Sick Leave, please refer to the OSHR Policy: [Sick Leave](#).

⋮



Time Statements

- Summary of all time data entered for an employee during a specific period
- ESS time users will be able to view time statements online
- Leave Administrator can print Time Statements for employees as needed
- Used to view Leave Offsetting

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Any retroactive processing of Time Evaluation could change the Time Evaluation results and therefore cause changes to the data shown on the Time Statement. It is best to run the Time Statement again whenever you want to analyze the data that it provides. This will insure that you have the most recent results available.

The Time Statement is the first place to go when an employee identifies a potential error.

Time Statement can show:

Leave that was accrued

Leave that was offset

Liabilities that were recovered

Donations that were applied

Position settings

Time statements may be printed individually or via a batch process by the Leave Administrator. For further information and field descriptions, you can access the *Time Statement* job aid located in the Time Management folder on the OSC Training HELP website.

<http://www.osc.nc.gov/training/osctd/help/index.html>



Time Statements



Time Statement

Period: 09/01/2015 to 09/30/2015 Page 1/1

Run Date: 11/03/2015

Personal / Organizational Data

Name	Kenneth F. Potter20	Overtime Period	28 - State Highway Patrol
Personnel Number	10000242	Work Schedule	24W24FX - MTWTFSS-7x24
Length Of Service	54.00 Months	Emp Group	B- SPA Law Enforcement
Position	0005393 - Trooper	Sub Area	NCOS- Tday Interface
Personnel Area	4705-CCPS-Highway Patrol	Time Mgt Status	1 - Positive Time Recording
Org Unit Name	CCPS SHP Troop F/District	Org UnitShort Text	20010543/495000000152

Leave Quotas (Hours available)

Description	Beginning	Accrued	Deducted	Paid Out	Expired	Offset	Adjustment	EndBalance
Vacation Leave	177.27							177.27
Sick Leave	152.00							152.00
Overtime Comp Time	0.00	6.00						6.00
Holiday Comp Time	96.00		2.00	6.00		2.00		88.00
Holiday leave	8.00							8.00
Community Service	24.00							24.00

Calculated Time Results

Description	Hours
Regular Time Hours	17.00
OT Comp Earned Hours	6.00

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The Time Statement provides a summary view of Time Evaluation results for an employee for a specified calendar month. It is not a pay slip, nor does it reflect compensation.

NOTE: This period of time does not align exactly with Overtime Periods.

The Time Statement gets its data from Time Evaluation results. If Time Evaluation has not run for an employee for a particular month, the Time Statement will still generate using transaction ZNCTIME, but there will be no data to display on the form. In ESS, an employee will receive a message indicating “Time Statements not available.”

If the time data for a month is incomplete or Time Evaluation has not been run for all of the month, some data is displayed, but will not be complete. The data shown on the Time Statement will update after time data changes have been processed by Time Evaluation.

Quota Overview Snapshot

Time evaluation

Personnel No. 0197877

Name Wednesday

Personnel area 1001 Agriculture Consume Cost Center 109999999 AGRICULT

EE subgroup A1 FT N-FLS OT Perm WS rule D01N086F MTWHF-8;

Selection dates Absence quotas Accrual information Attendance quotas

Totals row	AbQuotaTyp	Quota text	Unit	Entitl.	Rem.	Requested	Compens.
	10	Vacation Leave	Hours	80.00000	80.00000	0.00000	0.00000
	15	Sick Leave	Hours	80.00000	40.00000	40.00000	0.00000
	40	Holiday Leave	Hours	24.00000	24.00000	0.00000	0.00000
	65	Community Service	Hours	24.00000	24.00000	0.00000	0.00000

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OSC Training
Treasury of Accountability

The Quota Overview (PT50) transaction has several key tabs:

- Selection dates** – should use the all button to capture all dates
- Absence quotas** – tab shows quota types and their balances (shown above)
- Accrual information** – tabs shows accrual information
- Attendance quota tab** – not in use

On the Absence quotas tab there are several columns showing key values:

- Entitlement** – what is added to the quota balance through accruals, offsets, or adjustments during the display period
- Remaining** – hours left for use by employee
- Requested** – hours deducted
- Compensated** – leave donation

On the Accrual Information tab:

- Generated** – calculated by the system and ready to be moved into employee’s quotas during next Time Evaluation
- Transferred** – moved into employee’s quota and available for use



Exercise 2.1 – Quota Overview – PT50

Quota Overview – PT50

- You wish to check an employee's accrual rate for Vacation Leave

Required data:

- Personnel number



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2.1 - Walkthrough - Quota Overview

PT50

Scenario

An employee has requested Vacation leave. You wish to check to see if an employee has enough leave in her absence quotas to take the requested amount.

Instructions

1. Enter transaction code **PT50** in the Command field and click  (Enter).
2. Complete the following fields:

Tiffany Lawrence							
Student 1	80000510	Student 6	80000515	Student 11	80000520	Student 16	80000525
Student 2	80000511	Student 7	80000516	Student 12	80000521	Student 17	80000526
Student 3	80000512	Student 8	80000517	Student 13	80000522	Student 18	80000527
Student 4	80000513	Student 9	80000518	Student 14	80000523	Student 19	80000528
Student 5	80000514	Student 10	80000519	Student 15	80000524	Student 20	80000529

Field	Value
Personnel no.	Use Employee Tiffany Lawrence from the above list. Your instructor will advise what your student ID is.

3. Click the **All** button.
4. Click the **Absences quotas** tab.
5. Review the displayed quota balances as follows as you will need this info in a later exercise:

Vacation	Sick	OT	HC	HL	BL
342.63	353.11	0	0	16	0

6. Click the  (Back) button to return to the SAP Easy Access screen.



Quota Adjustments

Quota adjustments can be used to:

- Manage Holiday(s) during LOA's
- Correct quota errors (should not be a common occurrence)
- Advance leave
- Convert Community Service Leave to Community Service Leave Tutoring or to Literacy Volunteer Leave
- Administer Voluntary Shared Leave or to return VSL

Quota adjustments are done by selecting the Quota subtype and then entering the number of hours

Transaction – Maintain Time Data · PA61

- Infotype 2013
 - » Subtype 10 – Vacation
 - » Subtype 15 – Sick Leave
 - » Subtype 31 – Advanced Vacation
 - » Subtype 32 – Advanced Sick

NOTE: Make notes in the system for all adjustments.

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In normal day to day operations, Leave Administrators should not be changing quotas as a standard practice. However, it is necessary to have an awareness of steps to take in the event that an occasional correction is needed.

The list above is a partial list of Quotas. A complete list may be viewed in SAP.

IT 2013 is needed when:

- An employee is on an LOA action, in pay status and:
 - The LOA date is prior to the normal system generated accrual
 - The LOA date is after the normal system generated accrual and the employee is reinstated prior to the actual holiday
- An employee separates after the holiday accrual but before the actual holiday
- An employee goes out on LOA after entitlement has been granted but does not have enough leave to keep them in pay status until the holiday
- IT 2013 records should follow the normal dates of the system behavior in order to align the time types correctly



Quota Adjustments

IT 2013 should not be used....

- To remove a negative quota balance
- To correct a quota balance
- To correct Adverse Weather
- To realign quota deduction
- To enhance vacation payouts

If you think you need an IT 2013 for any of the above situation, contact BEST for assistance.

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Valid Reasons to Make Adjustments

- Giving employee's military leave training hours for the first time (automatically resets on 10/1 after initial entry)
 - ✉ *NOTE: When an EE is no longer eligible for Military Training leave a Leave Admin or HR Data Maintainer may create an IT2012-ZMLE to stop the automatic accruals that take place in October of each year.*
- Moving hours from CSL to Tutoring or Literacy Volunteer Leave
- Giving employee Advanced Vacation or Sick (with approval)
- Returning unused voluntary shared leave
- New hires from outside of SAP coming in with balances
- Separation action zeroing out remaining vacation balance

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As previously indicated, quota corrections should not be a standard practice. The list above shows some valid reasons as to why an adjustment may be necessary.

NOTE: When an EE is no longer eligible for Military Training leave a Leave Admin or HR Data Maintainer may create an IT2012-ZMLE to stop the automatic accruals that take place in October of each year.

The Delimiting Military Training Leave Job Aid is located in the Time Management folder on the OSC Training HELP website.

<http://www.osc.nc.gov/training/osctd/help/index.html>



Quota Correction Rules

Always add notes (F9 or Edit>Maintain Text) explaining why you are creating or changing an IT2013 record

There should **never** be more than one IT2013 record per quota type on the same date

Never choose the "Replace generated entitlement" radio button. Only choose the "Increase" or "Reduce" radio button.

- **Do not** put a negative sign on the value in the number field. Use the "Increase" or "Reduce" radio buttons to indicate that value should be added or subtracted.
- **Always** set the "Transfer" option to "Do not change transfer time".
- If the number of hours on an IT2013 is incorrect, it is better to change that record than to create another record to increase/decrease the hours. This is not possible with Wave 1 go-live conversion IT2013's which are dated before go-live. In that case, a new record must be created.
- Changing a conversion IT2013 record from "Increase" to "Reduce" is not the same as deleting it or changing the hours to zero. If the beginning balance should be zero hours, delete the record or change the hours to zero.

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Leave Administrators have the following options to choose that are *allowed* by the system:

- Increase generated entitlement
- Reduce generated entitlement
- Replace generated entitlement (**DO NOT USE!**)

The Leave Administrator must also choose a transfer option – In the past “**Only transfer quota correction immediately**” was used for quota adjustments. The recommended selection “**Do not change transfer time**” ensures the quota adjustment is processed correctly. All existing records with the “**Only transfer quota correction immediately**” selection should ***NOT*** be changed.

The balance will reflect the change once Time Evaluation has been run at night.



Negative Quota Corrections

Negative quota balances can result from any change that reduces the Entitlement amount on a quota. All changes to the Entitlement amount are made through accruals, which are visible in PT50 on the Accrual tab. Changes that can result in the reduction of an Entitlement amount include:

- An IT 2013 – Quota Correction record with the “Reduce” option chosen
- Changes time data or time settings that alter how many hours were accrued in a quota
- A correction to Time Evaluation configuration that alters the calculation of accruals

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For additional information see the following job aids located on the OSC Training HELP website in the Time Management folder:

- *Addressing Negative Quota Balances*
- *Identifying Employees with Negative Balances*

<http://www.osc.nc.gov/training/osctd/help/index.html>



Exercise 2.2 – Quota Adjustment Military Leave

Quota Adjustment – Military Leave Training – PA61

- Add Military Leave Training to an employee’s record.
- **REMINDER:** Military Leave Training only has to be added one time; it automatically updates on October 1, each year.

Required data:

- Infotype – 2013
- Subtype 85



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For more information regarding Military Leave, please refer to the OSHR Policy: [Military Leave](#).

2.2 - Exercise – Quota Adjustment – Military Training

PA61

Scenario

You need to add 80 hours for military training to an employee.

NOTE: This infotype has to be added only one time. On October 1 of each subsequent year, SAP will automatically create a new record.

Instructions

1. Enter transaction code **PA61** in the Command field and click .
2. Complete the following fields:

Tiffany Lawrence							
Student 1	80000510	Student 6	80000515	Student 11	80000520	Student 16	80000525
Student 2	80000511	Student 7	80000516	Student 12	80000521	Student 17	80000526
Student 3	80000512	Student 8	80000517	Student 13	80000522	Student 18	80000527
Student 4	80000513	Student 9	80000518	Student 14	80000523	Student 19	80000528
Student 5	80000514	Student 10	80000519	Student 15	80000524	Student 20	80000529

Field	Value
Personnel no.	Use employee Tiffany Lawrence.
Infotype	2013 (Quota Correction)
Subtype	85 (Military Leave Training)

3. Click  (**Create**).
4. Enter the current date in the Start field.
5. Verify that the Absence quota type field displays subtype **85** (Military Leave Training).
6. Type **80** in the quota number field.
7. Verify that the **Increase generated entitlement** button is selected.
8. In the Transfer field select **Do not change transfer time**.
9. Click **Edit > Maintain text** from the menu to write an applicable note justifying the reason you are making an adjustment.
10. Click **Save**. Observe the infotype now has a notes icon displayed.
11. Click **Save** to save the infotype. The Maintain Time Data screen displays with a message that the transfer was successful. The next time time eval is run, the 80 hours will display in PT50.
12. Click the  (Back) button to return to the SAP Easy Access screen.



Exercise 2.3 Quota Adjustment Advance Leave – PA61

Quota Adjustment – Advance Leave – PA61

- You need to create an advance leave quota adjustment for an employee based on an approved request for 40 hours of vacation.

Required data:

- Infotype – 2013
- Subtype – 31



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Work Instruction: Advanced Leave – PA61

NOTE: The creation of the absence quota does not create a liability. The absences recorded for the employee that uses the Advanced Leave will create a liability from the employee to the State.

2.3 - Walkthrough – Quota Adjustment – Advanced Leave

PA61

Scenario

You need to create an advance leave quota adjustment for an employee based on an approved request for 40 hours of vacation.

Instructions

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

1. Enter transaction code **PA61** in the Command field and click .
2. Complete the following fields:

Kathy Allen							
Student 1	80000530	Student 6	80000535	Student 11	80000540	Student 16	80000545
Student 2	80000531	Student 7	80000536	Student 12	80000541	Student 17	80000546
Student 3	80000532	Student 8	80000537	Student 13	80000542	Student 18	80000547
Student 4	80000533	Student 9	80000538	Student 14	80000543	Student 19	80000548
Student 5	80000534	Student 10	80000539	Student 15	80000544	Student 20	80000549

Field	Value
Personnel no.	Use Employee Kathy Allen from the above list
Infotype	2013
Subtype	31 - Advanced Leave – allowed

3. Click on the **Create** button.
4. Enter current date in the Start field.
5. Verify that the Absence quota type field displays subtype **31**.
6. Type **40** in the quota number field.
7. Verify that the **Increase generated entitlement** button is selected.
8. In the Transfer field select **Do not change transfer time**.
9. Click **Edit > Maintain text** from the menu to write an applicable note justifying the reason you are making an adjustment.
10. Click **Save**. Observe the infotype now has a notes icon displayed.
11. Click **Save** to save the infotype. The Maintain Time Data system displays the message that you have successfully completed the transfer.
12. Click the  (Back) button to return to the SAP Easy Access screen.

Exercise 2.4 Quota Adjustment Separation Action – PA61

Quota Adjustment – Separation Action – PA61

- EE separated from State Employment. Vacation Quota paid out (240 hours) on IT 0416. Remaining balance zeroed out using PA 61- IT 2013.

Required data:

- Infotype – 2013
- Subtype – 10

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2.4 - Exercise – Quota Adjustment – Separation Action

PA61

Scenario

EE separated from State Employment. Vacation Quota was paid out (240 hours). Leave Administrator needs now to zero out remaining vacation quota balance.

Instructions

1. Enter transaction code **PA61** in the Command field and click .
2. Complete the following fields:

Tiffany Lawrence							
Student 1	80000510	Student 6	80000515	Student 11	80000520	Student 16	80000525
Student 2	80000511	Student 7	80000516	Student 12	80000521	Student 17	80000526
Student 3	80000512	Student 8	80000517	Student 13	80000522	Student 18	80000527
Student 4	80000513	Student 9	80000518	Student 14	80000523	Student 19	80000528
Student 5	80000514	Student 10	80000519	Student 15	80000524	Student 20	80000529

Field	Value
Personnel no.	Use Employee Tiffany Lawrence from the list above
Infotype	2013
Subtype	10– Vacation Leave

3. Click on the **Create** button.
4. Enter the date of Separation in the Start field.
5. Verify that the Absence Quota type field displays Subtype 10
6. Type the number of hours was remaining from the Vacation Quota balance (102.63)
7. Verify that the **Reduce generated entitlement** button is selected.
8. In the Transfer field select **Do not change transfer time.**
9. Click **Save**. The system displays the message that you have successfully completed the Transfer.

NOTE: Add a note stating the reason why the Vacation Quota was zeroed out.

10. Click Edit then maintain text.
11. Click the  (Back) button to return to the SAP Easy Access screen.



CSL to CSL Tutoring Option

- Full time employees may opt to convert their 24 hours of community service leave (CSL) to 36 hours of community service tutoring.
- Tutoring leave should be taken in 1 hour increments
- Employees that elect tutoring must use A/A Type 9565



**A/A Type
9560**

**Community Service
Leave - 24 hours**

→



**A/A Type
9565**

**Community Service
Tutoring – 36 hours**

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Employees accrue 24 hours of Community Service Leave (CSL) annually. Full time employees may opt to convert their 24 hours of community service leave (CSL) to 36 hours of community service tutoring. This conversion is performed by creating a quota correction to reduce quota 65 - CSL to zero hours and another to increase quota 66 - CSL Tutoring to 36 hours.

Example: Employee has used 6.00 hours of CSL. Maximum amount of entitlement for Quota 66 - CSL Tutoring would equal 30 hours (36 less 6 hours CSL).

CSL must be used between January 1st and December 31st within the calendar year.

CSL should be used in one-hour increments.

NOTE: In lieu of the regular Community Service Leave (24 hours), an employee, with approval of the school and supervisor, may be eligible to choose either CSL Tutoring **or** CSL Literacy Volunteer Leave.

For more information regarding Community Service, please refer to the OSHR Policy: [Community Service](#)

For more information regarding Community Service Leave – Literacy, Tutoring and Mentoring, please refer to the OSHR Policy: [Community Service Leave – Literacy, Tutoring and Mentoring](#)

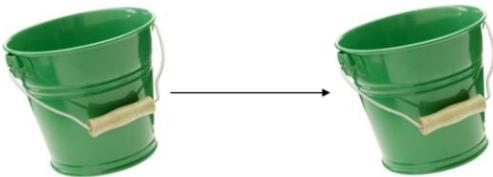
For additional information see the PA61 Quota Adjustment BPP located in the Time Management folder on OSC Training HELP

<http://www.osc.nc.gov/training/osctd/help/index.html>



CSL to Literacy Volunteer Leave

- In lieu of the 24 hours of CSL and in lieu of CSL Tutoring, an employee may opt to volunteer in a literacy program.
- Literacy Voluntary Leave may be used up to 5 hours each month not to exceed 45 hours in a calendar year. This leave should be used exclusively for assisting students in reading and/or writing skills in the public school.
- Employees that elect literacy volunteer must use A/A type 9566



A/A Type 9566	Community Service Leave - 24 hours	Literacy Volunteer Leave – up to 5 hours each month not to exceed 45 hours in a calendar year.	A/A Type 9566
--------------------------	-----------------------------------------------	-------------------------------------------------------------------------------------------------------------------	--------------------------

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In lieu of the 24 hours of CSL and in lieu of CSL Tutoring, an employee may opt to volunteer in a literacy program.

Full time employees may opt to convert their 24 hours of community service leave (CSL) to literacy volunteer leave. This conversion is performed by creating a quota correction to reduce quota 65 - CSL to zero hours and another to increase quota 67 - Literacy Volunteer Leave. The maximum amount that can be established in Quota 67 - Literacy Volunteer Leave is 45 hours per calendar year. If an employee has already consumed Quota 65 - CSL the maximum amount available to be transferred to Quota 67 = 45 – T65U.

Example: Employee has used 5.00 hours of CSL. Maximum amount of entitlement for Quota 67 - Literacy Volunteer Leave would equal 40 hours (45 less 5.00 hours CSL).

Literacy Volunteer Leave must be used between January 1st and December 31st within the calendar year.

Literacy Volunteer Leave may to used up to 5 hours each month while schools are in session not to exceed 45 hours in a calendar year.

NOTE: In lieu of the regular Community Service Leave (24 hours), an employee, with approval of the school and supervisor, may be eligible to choose either CSL Tutoring **or** CSL Literacy Volunteer Leave.

For more information regarding Community Service Leave – Literacy, Tutoring and Mentoring, please refer to the OSHR Policy: [Community Service Leave – Literacy, Tutoring and Mentoring](#).



Exercise 2.5 Quota Adjustment CSL to CSL Tutoring – PA61

Convert CSL to CSL Tutoring – Quota Adjustment – PA61

- You need to convert an employee’s 24 hours of community service leave to 36 hours of community service leave – tutoring

Required data:

- Infotype – 2013
- Subtype – CSL – 65 and CSL Tutoring - 66



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📁 **NOTE:** Normally, time balances should be adjusted through corrections to CATS entries if possible.

Work Instruction: Quota Adjustment PA61

2.5 - Walkthrough – Convert CSL to CSL Tutoring – Quota Adjustment

Scenario

You need to convert an employee’s 24 hours of community service leave to 36 hours of community service leave – tutoring.

Instructions

1. Enter transaction code **PA61** in the Command field and click .
2. Complete the following fields:

Tiffany Lawrence							
Student 1	80000510	Student 6	80000515	Student 11	80000520	Student 16	80000525
Student 2	80000511	Student 7	80000516	Student 12	80000521	Student 17	80000526
Student 3	80000512	Student 8	80000517	Student 13	80000522	Student 18	80000527
Student 4	80000513	Student 9	80000518	Student 14	80000523	Student 19	80000528
Student 5	80000514	Student 10	80000519	Student 15	80000524	Student 20	80000529

Field	Value
Personnel number	Use Employee Tiffany Lawrence assigned student number from above.
Infotype	2013
Subtype	65

3. Click the **Create** button.
4. Enter the current date in the Start field.
5. Verify that the Absence quota type field displays subtype 65.
6. Type **24** in the quota number field.
7. Click the **Reduce generated entitlement** button.
8. In the Transfer field select **Do not change transfer time**.

NOTE: Remember to add a note stating the reason why you are processing the Quota Adjustment.

9. Click **Save**. The system displays the message that you have successfully completed the transfer.

NOTE: When using **PA61** to adjust a quota, be sure to pay attention to the increase, decrease, or replace option.

10. Repeat steps above to create a **2013** quota correction for subtype **66** to add **36** hours of Community Service Leave – Tutoring.
11. Click the  (Back) button to return to the SAP Easy Access screen.



Voluntary Shared Leave



1. Sick Leave

2. Voluntary Shared Leave

3. Advanced Sick Leave

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As with the other topics in this lesson, the Voluntary Shared Leave process is administered with Quota Adjustments.

The *TM340 - Voluntary Shared Leave* Web-based training course is available. Log in to LMS to register online.

For more information regarding Voluntary Shared Leave, please refer to the OSHR Policy: [Voluntary Shared Leave](#).



Voluntary Shared Leave Process

1. A Voluntary Shared Leave Event must be established:
 - Date of the event should reflect the start date of the employee’s confinement or disability.
 - No system check for eligibility
2. A Donation must be processed
3. The Recipient must be credited

BEST Shared Services will manage donations when the Donor and Recipient are in different BEACON agencies.

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A Leave Administrator will process leave donations within their agency. Donations are now Vacation or Sick Leave.

For clarification on who may donate to whom and the limits on the amount of leave that may be donated, please refer to the OSHR Policy: [Voluntary Shared Leave](#).



Ending of VSL Events

- Unused leave, in excess of 40 hours, must be returned to ACTIVE employees, on a pro-rated basis at the end of the Shared Leave event (not to exceed 2 decimal places)
- Leave remaining less than 40 hours should be moved to sick leave and the VSL event delimited
- Leave Administrators may manage the return of leave to Donors if all Donors are in the Recipient's agency
- If leave is to be restored to people outside the agency, then the Leave Administrator must contact BEST Shared Services
- The VSL Event must be ended by changing the To date field in the VSL event

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For more information regarding Voluntary Shared Leave, please refer to the OSHR Policy: [Voluntary Shared Leave](#).



Knowledge Check

1. True or False – Employees accrue on the 1st of the month.
2. True or False – Advanced Leave requires management approval.
3. True or False – The system will automatically recover future accruals towards the Advanced Leave liability until it is satisfied.
4. True or False – Subtype 10 is Sick Leave.
5. True or False – Quota Adjustments are done through the PA61 transaction.
6. True of False – Employees must formally elect the tutoring option.
7. What transaction will show the most up to date leave balances?
8. What would be a valid reason for making a quota adjustment?
9. True or False – For quota adjustments you do not need to make notes or comments.
10. Can you see recovered liabilities on the time statement?
11. What transaction would you view to see leave balances/accruals?
12. What attendance type is not counted towards 50% of the employee's work days in order to receive accruals?

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Lesson Review

In this lesson, you learned to:

- View quotas
- Manage quota adjustments
- Describe Community Service Leave in OSC HR/Payroll
- Convert quota from CSL to CSL-Tutoring or Literacy Volunteer Leave
- Describe Voluntary Shared Leave process at a high level

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Course Map

- Lesson 1: Overview
- Lesson 2: Quotas and Leave Management
- Lesson 3: FMLA**
- Lesson 4: Reporting and Troubleshooting

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FMLA is the Family and Medical Leave Act.



Lesson Objectives

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

- Create FMLA Events
- Apply absences during a FMLA Event
- Describe the ending of a FMLA Event

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Terms and Concepts

FMLA event

- A qualified event under the Federal Law that guarantees an employee’s job will be protected during an absence of up to 12 weeks.

FMLA absences

- An absence that falls during an employee’s FMLA event period that is attributable to that event.
- An absence that is not attributable to that event that falls in the FMLA event period needs to be deselected to use other leave.

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For more information regarding FMLA, please refer to the following OSHR Policies:

[Family and Medical Leave](#)

[Family and Medical Leave – Military Caregiver](#)

[Family and Medical Leave – Qualifying Exigency](#)

Linking Events to Absences

1. FMLA Event Maintainer creates event

PTFMLA Event

Qualified Absences

Absence

Absence

Absence

2. After event is created the Leave Administrator ties qualified absences to the Event

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OSC Training
 Integrity of Accountability

There are two FMLA profiles:

- FMLA Maintainer

- FMLA Administrator

There is a security role – FMLA Event Maintainer – that may create FMLA Events.

All Leave Administrators may apply absences, but not all may create events.

Approved Leave, Sick Leave and LWOP absences may be applied to an FMLA event.

Paid or unpaid absences may be applied. Pay status is irrelevant.

Donated Leave under Voluntary Shared Leave (VSL) does not affect FMLA. Absences are recorded as Sick Leave and applied to the FMLA event, same as other absences.



Exercise 3.1 Create FMLA Event - PTFMLA

Create FMLA Event and Apply Absences – PTFMLA

- You need to create a FMLA event in SAP based on an approved FMLA request by an employee

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Work instruction: Processing PTFMLA Event - PTFMLA

3.1 - Walkthrough – Create FMLA Event

PTFMLA

Scenario

You need to create a FMLA event in SAP based on an approved FMLA request by an employee.

Instructions

1. Enter transaction code **PTFMLA** in the Command field and click .
2. Complete the following fields:

Field	Value
Profile	SAP_FMLA_APP -- FMLA Approver NOTE: You will only have to do this the first time you access the PTFMLA transaction.

3. Click the **Execute** button. The FMLA Workbench is displayed.
4. Complete the following fields:

Kathy Allen							
Student 1	80000530	Student 6	80000535	Student 11	80000540	Student 16	80000545
Student 2	80000531	Student 7	80000536	Student 12	80000541	Student 17	80000546
Student 3	80000532	Student 8	80000537	Student 13	80000542	Student 18	80000547
Student 4	80000533	Student 9	80000538	Student 14	80000543	Student 19	80000548
Student 5	80000534	Student 10	80000539	Student 15	80000544	Student 20	80000549

Field	Value
Personnel number	Use Employee Kathy Allen from the above list

5. Press the **Enter** button.
6. Click the **Create Request** button. The Create FMLA Request screen is displayed.
7. Complete the following fields:

Field	Value
FMLA Reason	Birth
Valid from	7/1/12
Valid to	6/30/13
Certificate Provided	Select this check box

8. Click the Check Request  button.

9. Complete the following field:

Field	Value
Status	Approved

10. Press the **Enter** button.
11. Click the **Save** button.

You will need to apply absences to an open event for Kathy Allen.

12. Click the **Absences** tab. The Assign Absences screen is displayed.
13. Click the checkbox in front of each absence that is a relevant absence in the FMLA event period.
14. Click the **Save** button.
15. Click the  (Back) button to return to the SAP Easy Access screen.



FMLA – Ending the Event

The FMLA event will end when either:

1. The 12 month rolling period has expired
- or
2. The **FMLA Event Maintainer** changes the end date



FROM —————> TO

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Changing the end date held in the PTFMLA To field will end (delimit) the event.



Knowledge Check

1. True or False - All employee absences during an FMLA event are FMLA relevant.
2. True or False – All Leave Admins may create FMLA events.
3. For an FMLA event, an employee’s job is protected for how many weeks and/or hours?
4. True or False – Voluntary Shared Leave has no effect on FMLA.
5. What does FMLA stand for?
6. True or False – The FMLA Maintainer can create FMLA events?

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Lesson Review

In this lesson, you learned to:

- Create FMLA Events
- Apply absences during a FMLA Event
- Describe the ending of a FMLA Event

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Course Map

- Lesson 1: Overview
- Lesson 2: Quotas and Leave Management
- Lesson 3: FMLA
- Lesson 4: Reporting and Troubleshooting**

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Lesson Objectives

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

- Review Time and Leave entries with transaction CATS_DA
- Review Leave results with Time Statements
- Troubleshoot quota concerns

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About Troubleshooting

PRACTICE
This lesson is designed to introduce troubleshooting. After class be sure to practice and explore.

BE PATIENT
Troubleshooting is a skill that is honed over time – don't be alarmed if you don't feel like an expert at the end of class.

IT GETS EASIER
As you become more familiar with the SAP system, data, processes, and transactions your comfort with troubleshooting will increase.

DON'T WORRY
The transactions discussed in this topic are displays and reports. They don't update or change data so running them will not "hurt" anything.

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Variants

- A Variant in SAP is a set of saved selection criteria to be used during data entry or reporting.
- Advantages of variants:
 1. Faster entry
 2. Reduced errors
 3. May be used by more than one Leave Administrator and/or Time Administrator

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To create a Variant using CATS_DA and CAT2 transactions:

Enter Personnel numbers using Multiple Selection functionality.

1. Click **Save As Variant** button.
2. Enter Variant Name and Description.
3. Click **Save**.

To use a Variant:

1. Click **Get Variant** button or select menu path
Goto > Variant > Get.
2. Double-click desired Variant to select.
3. SAP will populate CATS_DA with Personnel numbers in Variant.
4. Modify and enter data as needed.

 **NOTE:** You may change variants by saving the new variant with the same name. The system will warn you that the variant will be overwritten.



Display Working Time

Display Working Times, transaction CATS_DA, allows for the review of an employee's time records for a specified period of time.

- It reflects time as it was entered. Changes to entries are reflected as additional lines on the same date.
- It displays A/A codes, amounts, premium codes, and audit details.
- It can be subtotaled by A/A types or searched by specific A/A types.
- Can show a list of employees by using the multiple employee option
- Does not show offsetting

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CATS_DA will not display changes to the data that resulted from Time Evaluation.

Time Evaluation will offset leave taken in a week where the employee has exceeded their minimum expected work hours.

Leave that has been offset will show on the employee's Time Statement.



Exercise 4.1 Display Working Times CATS_DA

Display Working Times- CATS_DA

- You wish to view an employee’s working times in SAP.

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Work instruction: Display Working Times – CATS_DA

Items to demonstrate:

1. Display data
2. Subtotal Data
3. Change columns to display
4. Filter for a single A/A type

4.1 - Walkthrough – Display Working Times

CATS_DA

Scenario

You wish to view an employee’s working times in SAP.

Instructions

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

1. Enter transaction code **CATS_DA** in the Command field and click .
2. Complete the following fields:

Field	Value
Reporting Period	Choose Current Year .
Personnel number	10000042 (Kenneth Potter)

3. Click the **Execute** button.

Listen as your instructor describes some of the displayed fields for you.

4. Click the  (Back) button to return to the SAP Easy Access screen.



Time Statements

- Summary of all time data entered for an employee during a specific period
- ESS time users will be able to view time statements online
- Leave Administrator can print Time Statements for employees as needed
- Used to view Leave Offsetting

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Any retroactive processing of Time Evaluation could change the Time Evaluation results and therefore cause changes to the data shown on the Time Statement. It is best to run the Time Statement again whenever you want to analyze the data that it provides. This will insure that you have the most recent results available.

The Time Statement is the first place to go when an employee identifies a potential error.

Time Statement can show:

Leave that was accrued

Leave that was offset

Liabilities that were recovered

Donations that were applied

Position settings

Time statements may be printed individually or via a batch process by the Leave Administrator. For further information and field descriptions, you can access the *Time Statement* job aid in the Time Management folder on the OSC Training HELP website.

<http://www.osc.nc.gov/training/osctd/help/index.html>



Time Statements



Time Statement

Period: 09/01/2015 to 09/30/2015 Page 1/1

Run Date: 11/03/2015

Personal / Organizational Data

Name	Kenneth F. Potter20	Overtime Period	25 - State Highway Patrol
Personal Number	13000042	Work Schedule	024W24FX - MTWTFSaS-7u24
Length Of Service	54.00 Months	Emp. Group	B- SPA Law Enforcement
Position	60085393 - Trooper	Sub Area	NC08- Tday Interface
Personal Area	4705-CCPS-Highway Patrol	Time Mgt Status	1 - Positive Time Recording
Org. Unit Name	CCPS SHP Troop. F/District	Org. Unit/Short Text	20010543/496000000152

Leave Quotas (hours available)

Description	Beginning	Accrued	Deducted	Paid Out	Expired	Offset	Adjustment	EndBalance
Vacation Leave	177.27							177.27
Sick Leave	152.00							152.00
Overtime Comp Time	0.00	6.00						6.00
Holiday Comp Time	86.00		2.00	8.00		2.00		86.00
Holiday leave	8.00							8.00
Community Service	24.00							24.00

Calculated Time Results

Description	Hours
Regular Time Hours	17.00
OT Comp Earned Hours	6.00

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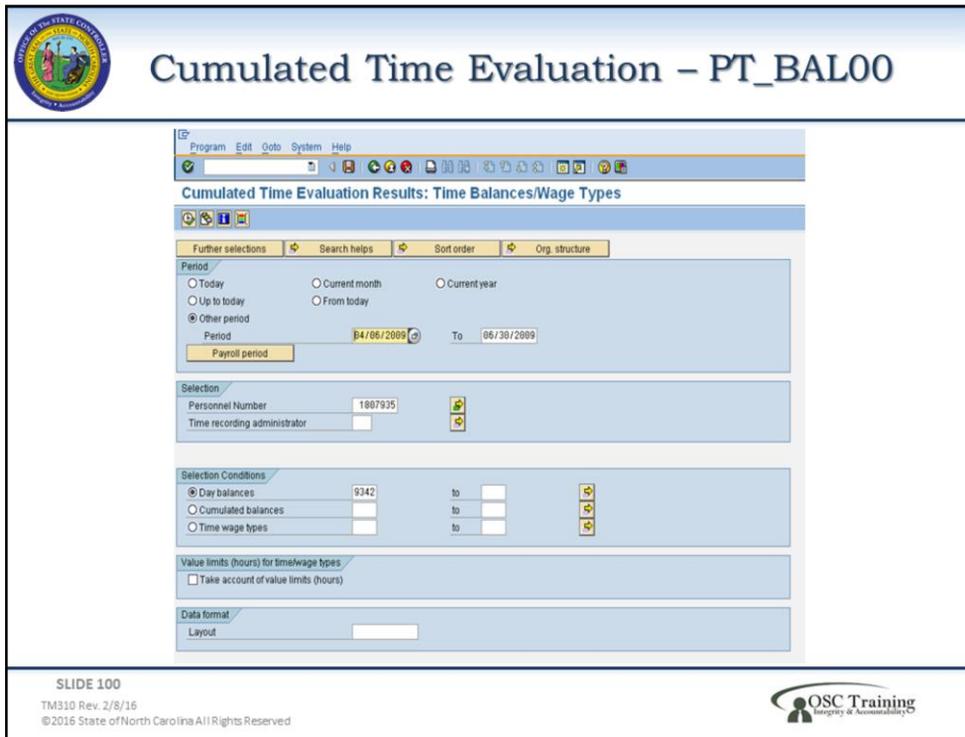


The Time Statement provides a summary view of Time Evaluation results for an employee for a specified calendar month. It is not a pay slip, nor does it reflect compensation.

NOTE: This period of time does not align exactly with Overtime Periods.

The Time Statement gets its data from Time Evaluation results. If Time Evaluation has not run for an employee for a particular month, the Time Statement will still generate using transaction ZNCTIME, but there will be no data to display on the form. In ESS, an employee will receive a message indicating “Time Statements not available.”

If the time data for a month is incomplete or Time Evaluation has not been run for all of the month, some data is displayed, but will not be complete. The data shown on the Time Statement will update after time data changes have been processed by Time Evaluation.



View Absence Hours Offset with PT_BAL00 uses Code 9342 in Selection Criteria Day Balances or Cumulated Balances.

List of employees with Negative Quotas -

Run the PT_BAL00 report, with variant /NEGQUOTA-PHS1, to identify your employees with negative balances.

NOTE: The variant above limits the results to the quotas listed below.

Refer to the **Identifying Employees with Negative Balances** job aid located in the Time Management folder on the OSC Training HELP website for assistance in running this report.

<http://www.osc.nc.gov/training/osctd/help/index.html>

After determining the employees with negative balances, divide the records into groups by the quota type:

- 10 – Vacation Leave
- 15 – Sick Leave
- 50 – Bonus Leave
- 65 – Community Service Leave
- 66 - Community Service Leave – Tutoring
- 67 - Literacy Volunteer Leave



Knowledge Check

1. True or False – Employees will be paid for everything recorded in CATS.
2. True or False - CATS_DA is capable of showing a list of employees.
3. True or False - Time Statements are always available.
4. True or False – Leave that has been offset will show in CATS_DA.
5. True or False – Time Statements display compensation.
6. What are some advantages of using a variant?

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Lesson Review

In this lesson, you learned to:

- Review Time and Leave entries with transaction CATS_DA
- Review Leave results with Time Statements
- Troubleshoot quota concerns

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Course Review

In this course, you learned to:

- Describe the Quotas available to employees
- Describe and execute the process for quota corrections
- Describe and execute the maintenance of FMLA-relevant absences
- Perform basic quota reporting and troubleshooting

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Next Steps

Monitor BEACON communication

- BEST Shared Services web site
 - URL: <http://www.osc.nc.gov/BEST/index.html>
- OSC Training website: **What's New link**
 - URL: http://www.osc.nc.gov/beacon/training/whats_new.html

Review conceptual materials

Practice what you've learned

- URL: <https://mybeacon.nc.gov>
- You may access help from mybeacon in the upper right corner of the screen.
 - Client 899
 - Use your current NCID user name and password

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Continue to monitor updates on the OSC 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 on the OSC website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance?

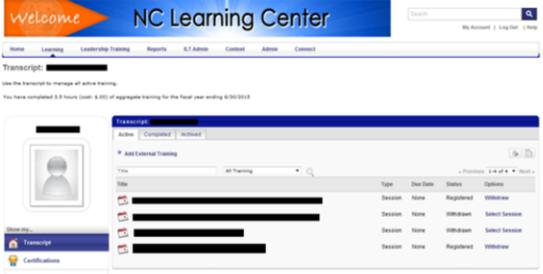
Remember to access Training Help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either online or by clicking on Training Help from within an SAP transaction.



Course Assessment and Evaluation

Course Assessment and Evaluation

- Follow the instructions given by your instructor to complete your course assessment and evaluation of today's class in the Learning Management System (LMS).



Don't forget to
click the
SUBMIT button!

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Conclusion

CONGRATULATIONS!

You have completed the course!

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