



**LOA – SHORT-TERM DISABILITY**

**Change Record:**

Creation Date: 12/11/13	Created by: w.creech
Changes:	<ul style="list-style-type: none"> <li>• All references to OSP have been changed to OSHR</li> <li>• All references to Office of State Personnel have been changed to Office of State <b>Human Resources</b></li> </ul>

**Trigger:**

There is a need to process a Leave of Absence for one of the reasons listed in the Business Process Procedure Overview section.

**Business Process Procedure Overview:**

**Leave of Absence – Short-Term Disability** – eligible employees who are unable to perform their regular work duties because of a temporary or permanent disability.

**Short-Term Disability Reasons:**

- 19 - Short-Term Disability 60 day waiting period – to track waiting period regardless if paid or unpaid
- 26 - Short-Term Disability (Leave) - employee is using leave during short-term disability.
- 22 - Short-Term Disability (Lump sum) – employee is paid out for leave in one payment.
- 20 - Short-Term Disability Regular – employee is placed on this reason on the 61<sup>st</sup> day if not using leave.
- 21 - Short-Term Disability Extended – employee is extended beyond 12 months.

**Short-Term Disability Information:**

*It is the Agency’s responsibility to:*

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

**IT2010 process – see end of document**

**Benefits** (*Employee is not using approved leave.*)

Agency Specific Benefits

- Each agency is responsible for administering these plans according to their agency process.

NC Flex Plans

- Will terminate in the OSC HR/Payroll system.

- Will end the last day of the month premiums were paid.
- Employees can continue these benefits plans while on LOA by paying the NC Flex vendors directly.
- Premiums will not be deducted from STD payments.

#### State Health Plan

- Employer contribution will continue as long as the employee is on STD (with more than 5 years of contributing service in the Retirement System).
- Employees on LOA's listed above are responsible for sending any dependent premiums and/or any employee only costs (80/20 plan) to BEST Shared Services. If premiums for EE only coverage are not received each month, their coverage will be reduced to the 70/30 Plan. Their next opportunity for any changes will be at the next Annual Enrollment.
- Premium payments can be deducted from STD payments only.
- Employees on LOA that requires them to pay full cost for their health insurance coverage must send premiums to BEST Shared Services. If premiums are not received their health insurance coverage will be terminated.

#### **LOA Checklist**

- PA20 Display
  - IT0000 - Actions
    - View employee's Action history to ensure correct action is being entered and former actions have been entered appropriately.
    - Verify eligibility for requested leave
- CATS\_DA – verify that time has been entered, released and approved. Also, verify last day worked (9500 - Time Worked).
- PT50 to ensure that employee has enough leave, if requesting to use leave.
- Communicate with the Benefits Representative
- Benefits – setup procedures for payment continuation or termination of benefits.

#### **Tips and Tricks:**

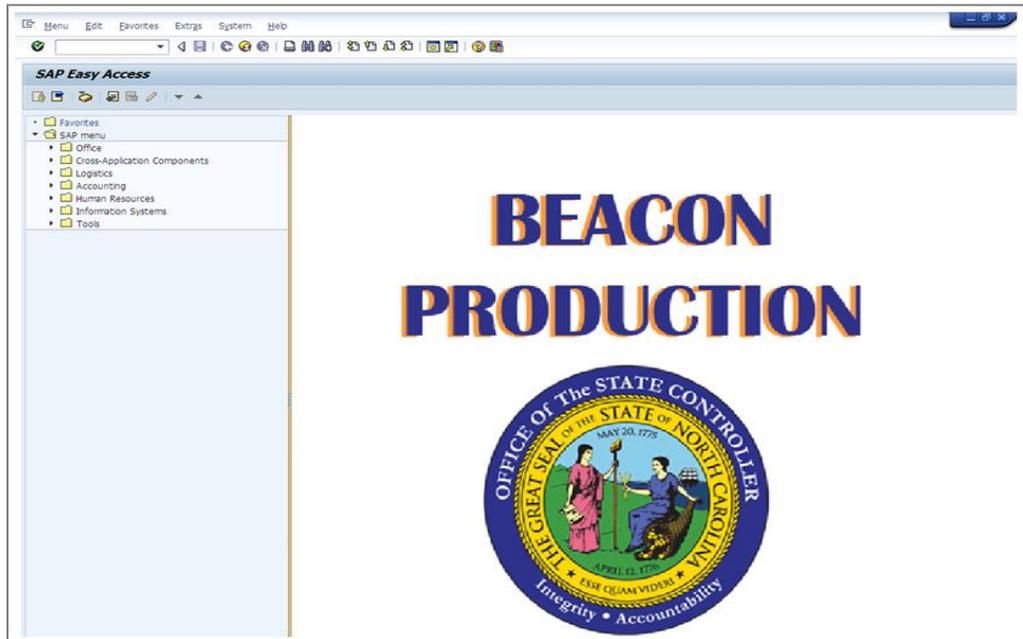
- Employee is active in the system.
- Time, Benefits, Payroll, State Service and longevity are dependent on entries made for action, reason and infotypes.
- Agency decides if Time (agency wide) is entered by PA (HR Data Maintainer) on IT2001 or Time (Time Administrator) in CAT2
- Employee should make no time entries while on LOA.
- Time Type 9500 (time worked) shouldn't be used while employee is on LOA.
- It is very important for HR to enter the LOA Action before the Time/Leave Administrator enters the event into the FMLA Workbench. The LOA Action is not automatically connected to the FMLA Workbench; therefore, HR should coordinate with the Time/Leave Administrator when an LOA Action is entered.

See the **PA Tips and Tricks Job Aid** for a fuller listing of Best Practices and Tips & Tricks. The job aid is located on the Training HELP website <http://www.osc.nc.gov/training/osctd/help/> in the following folder: *Personnel Administration > Job Aids*.

Access Transaction:

Via Menu Path:	Your menu path may contain this custom transaction code depending on your security roles.
Via Transaction Code:	ZPAA076; SBWP; PA40

PROCEDURE



1. Update the following field:

Field Name	Description	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	Enter value in Command.  <b>Example:</b> ZPAA076

2. Click the **Enter**  button.

 **Information**

You may want to enter this transaction code in your Favorites folder.

- Choose Favorites > Insert Favorites
- Type in ZPAA076
- Click Enter.

To see the transaction code displayed in front of the link in your favorites:

- Choose Edit > Settings
- Place a check next to Display Technical Name
- Click Enter

### Employee Action Request

Existing PCR No.

Personnel No.  Susan Castro

Last 4 digits (SSN)  First  Last

Effective on

Action Type  Leave of Absence (NC)

Reason  S/T Disability 60 Day w/Period

3. Update the following fields:

Field Name	Description	Values
Personnel No.	Unique employee identifier	Enter value in Personnel No.  <b>Example:</b> 80000610
Effective on	The date the action will be effective on.	Enter value in Effective on.  <b>Example:</b> 08/04/2011
Action Type	An action is a grouping of activities to perform a specific task. The action will prompt you for the Infotypes required to complete the task.	Enter value in Action Type.  <b>Example:</b> Z3
Reason	Reason for the action, such as S/T Disability 60 Day w/Period	Enter value in Reason.  <b>Example:</b> 19

Enter the Personnel Number of the individual to be placed on Leave of Absence. Click **Enter** to retrieve the name of the individual and verify you have the correct Personnel Number.

**NOTE:** You only enter the SSN and name for New Hires.

If you need to look up the personnel number, click your cursor in the field and click on the matchcode search button to the right of the field for search options.

4. Click the **Enter** button.

The system defaults the current date, but you may change the date to a day in the past or in the future.

There are several available **Reasons** to choose. For specific information on each reason, view the business process overview section at the beginning of these instructions.

Click Enter and verify the information is correct before proceeding.

<b>Employee Action Request</b>	
[Document] [Edit] [Refresh] [Delete]	
Existing PCR No.	[ ]
Personnel No.	80000610 Susan Castro
Last 4 digits (SSN)	[ ] First [ ] Last [ ]
Effective on	08/04/2011
Action Type	Z3 Leave of Absence (NC)
Reason	19 S/T Disability 60 Day w/Period

5. Click the **Create (F5)**  button.

If the information is correct, click **Create** to begin the process.

Leave the **Existing PCR No.** field blank if you are creating a new PCR.

Several fields on this screen are mandatory. The system will not let you continue if you have not provided data for the mandatory fields. If you are unsure which fields are mandatory, click Enter, and the system will prompt you for information in the mandatory fields.

### Employee Action Request

Initiate WF

PCR Number   
 Personnel Number  Susan Castro Action:  Leave of Absence (NC)  
 Last 4 digits(SSN)   Reason:  S/T Disability 60 Day w/Period  
 Effective on  Chng   St:

CURRENT		PROPOSED	
Pers.Area	<input type="text" value="4601"/> Cultural Resources	Pers.Area	<input type="text" value="4601"/> Cultural Resources
Subarea	<input type="text" value="NC01"/> 7day Norm	Subarea	<input type="text" value="NC01"/> 7day Norm
EE Group	<input type="text" value="A"/> SPA Employees	EE Group	<input type="text" value="A"/> SPA Employees
EE Subgroup	<input type="text" value="A1"/> FT N-FLSAOT Perm	EE Subgrp	<input type="text" value="A1"/> FT N-FLSAOT Perm
Org. Unit	<input type="text" value="20010310"/> CR CDS A&H MOH Design Sec	Org. Unit	<input type="text" value="20010310"/> CR CDS A&H MOH Design Sec
Job	<input type="text" value="30001528"/> Museum Specialist	Job	<input type="text" value="30001528"/> Museum Specialist
EE Position	<input type="text" value="65001875"/> Lighting And Interactive Design...	EE Position	<input type="text" value="65001875"/> Lighting And Interactive Design...

Basic Pay		Basic Pay	
Pay Scale type	<input type="text" value="01"/> Graded	Pay Scale type	<input type="text" value="01"/> Graded
Pay Scale Area	<input type="text" value="01"/> Annual Salaries	Pay Scale Area	<input type="text" value="01"/> Annual Salaries
Pay Scale Group	<input type="text" value="GR66"/> Level <input type="text" value="GR"/>	Pay Scale Group	<input type="text" value="GR66"/> Level <input type="text" value="GR"/>
Annual Salary	<input type="text" value="31,959.00"/> Hrly Sal <input type="text" value="0.00"/>	Annual Salary	<input type="text" value="31959"/> Hourly Salary <input type="text"/>
	<input type="text" value="Calc Step - 0"/>		<input type="text" value="0.00"/>
		Min	<input type="text" value="32,796.00"/>
		Max	<input type="text" value="51,446.00"/> Next Inc Date <input type="text"/>

Dates
Last day worked <input type="text"/>

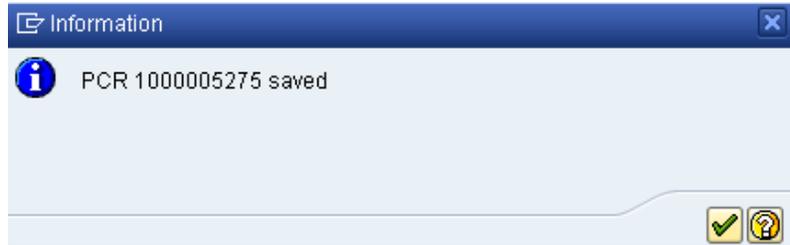
6. Update the following field:

Field Name	Description	Values
Annual Salary	Employee's annual basic pay	Enter value in Annual Salary <b>Example:</b> 31,959

Enter the salary information in the Annual Salary or Hourly Salary field. Click Enter to validate the data. No Basic Pay record is created for LOA Action but you must enter the salary on the PCR.

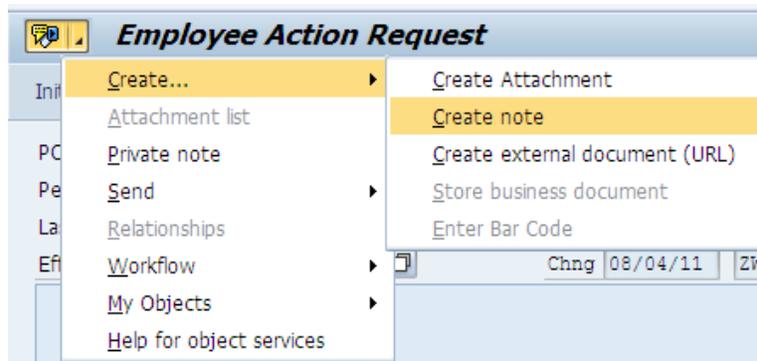
- Click the **Enter**  button.
- Click the **Save (Ctrl+S)**  button.

Click Save to save the data and receive a PCR number. The PCR has not been submitted to workflow yet.



- 9. Click the **Enter**  button.

You may save this information as many times as you wish. Each time you will receive a confirmation of the save. You will not be able to create a note attachment until you have saved it at least once. If you have already submitted the PCR to workflow, you will not be able to change the details, nor save any new information, only display the existing details.



- 10. Click the **Services for Objects**  button.
- 11. Click **Create... >> Create note** from the drop-down list on the menu.

You may enter any information that would be useful to the approvers downstream using the notes area or attachment area. If you just need to type some information or copy and paste from an email, create a note. If you want to add a document as an attachment, use the attachment area.

Follow the OSHR or agency-specific guidelines on notes and attachments to be added.

The screenshot shows a 'Create note' window. At the top, there is a title bar with the text 'Create note' and a close button. Below the title bar is a text input field labeled 'Title of note' containing the text 'Leave of Absence'. Underneath this is a large text area with the instruction 'Enter information as appropriate to support the Leave of Absence action for this individual.' At the bottom right of the window, there are two buttons: a green checkmark button and a red 'X' button.

12. Update the following fields:

Field Name	Description	Values
Title of note	The short text to act as the title of the attachment	Enter value in Title of note.  <b>Example:</b> Leave of Absence
Long text	An open text field	Enter value in long text.  <b>Example:</b> appropriate information

13. Click the **(Enter)**  button.

**Employee Action Request**

Initiate WF

PCR Number: 1000005275  
 Personnel Number: 80000610 Susan Castro Action: 23 Leave of Absence (NC)  
 Last 4 digits(SSN): Reason: 19 S/T Disability 60 Day w/Period  
 Effective on: 08/04/2011 Chng: 08/04/11 ZWFINOMPA031 St: D Created

CURRENT		PROPOSED	
Pers.Area	4601 Cultural Resources	Pers.Area	4601 Cultural Resources
Subarea	NC01 7day Norm	Subarea	NC01 7day Norm
EE Group	A SPA Employees	EE Group	A SPA Employees
EE Subgroup	A1 FT N-FLSAOT Perm	EE Subgrp	A1 FT N-FLSAOT Perm
Org. Unit	20010310 CR CDS A&H MOH Design Sec	Org. Unit	20010310 CR CDS A&H MOH Design Sec
Job	30001528 Museum Specialist	Job	30001528 Museum Specialist
EE Position	65001875 Lighting And Interactive Design...	EE Position	65001875 Lighting And Interactive Design...

**Basic Pay**

Pay Scale type	01 Graded	Pay Scale type	01 Graded
Pay Scale Area	01 Annual Salaries	Pay Scale Area	01 Annual Salaries
Pay Scale Group	GR66 Level GR	Pay Scale Group	GR66 Level GR
Annual Salary	31,959.00 Hrlr Sal 0.00	Annual Salary	31,959.00 Hourly Salary
Calc Step - 0		Calc Step - 0	0.00
Min	32,796.00	Max	51,446.00
Next Inc Date			

**Dates**

Last day worked

- Click the **Enter**  button.
- Click the **Save (Ctrl+S)**  button.
- Click the **Initiate WF**  button.

Select the Initiate Workflow button to send the Leave of Absence Action through the approval process. No changes can be made after the PCR has been submitted for approval, unless the PCR is rejected at any stage and sent back to you (the initiator/requestor).



- Click the **(Enter)**  button.

Employee Action Request

Existing PCR No.

Personnel No.

Last 4 digits (SSN)  First  Last

Effective on

Action Type  Leave of Absence (NC)

Reason  S/T Disability 60 Day w/Period

**NOTE:** To view the PCR, including notes and/or attachments, see the Display PCR Job Aid located on the Training HELP website <http://www.osc.nc.gov/training/osctd/help/> in the following folder: *Personnel Administration > Job Aids*.

17. Click the **Back (F3)**  button.

18. The Initiate Leave of Absence Action is complete.

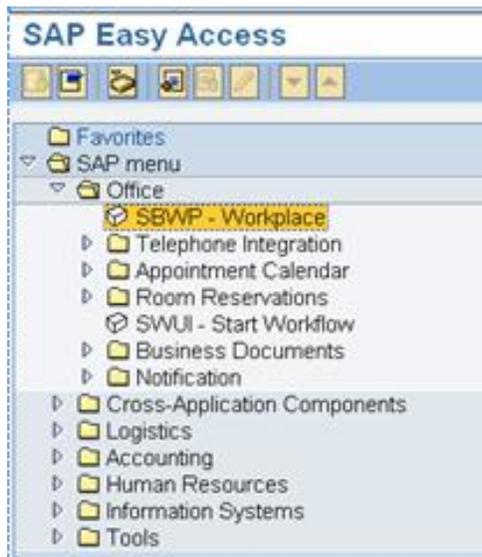
After Workflow Approvals have been received, proceed with the Complete Leave of Absence Action process.

### Instructions for Completing The Action

Access Transaction:

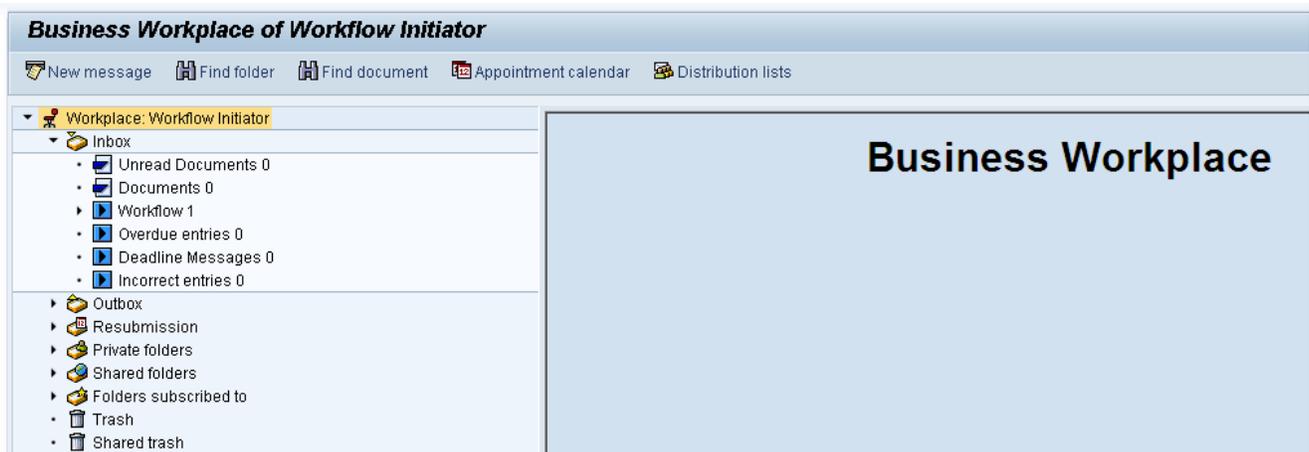
Via Menu Path:	Office >> SBWP – Workplace
Via Transaction Code:	SBWP, PA40

## PROCEDURE



19. Click the **SAP Business Workplace (Ctrl+F12)**  button.

These instructions assume you have already initiated the Leave of Absence Personnel Change Request (PCR) in workflow, and you have an approved PCR ready to be processed as a Leave of Absence in the system.



20. Select **Inbox >> Workflow**.
21. You can process using step 22 or step 23.

22. Select the PCR **4601 Create PA Action - Leave of Absence (NC) for Susan Castro - PCR: 1000005275** row. Double-click on the row.

23. Click the **Execute (F8)**  button.

A list of your approved (or rejected) PCR's are listed on the right side of the screen. Select the PCR to be processed and click Execute (or double-click the PCR). You may view the PCR details and/or Workflow Tracker details prior to executing the PCR if desired. Once the PCR is executed the Leave of Absence action will be launched.

24. Update the following field:

Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From.  <b>Example:</b> 08/04/2011

25. Highlight **Leave Of Absence (NC)** action type.

26. Click the **Execute (F8)**  button.

The effective date is the date the Leave of Absence will go into effect. This date must match the date on the approved PCR.

### Copy Actions (0000)

Execute info group Change info group

Pers.No. 80000610  
Name Susan Castro  
EEGroup A SPA Employees PersA 4601 Cultural Resources  
EESubgroup A1 FT N-FLSAOT Perm  
Start 08/04/2011 to 12/31/9999

**Personnel action**  
Action Type Z3 Leave of Absence (NC)  
Reason for Action 19 S/T Disability 60 Day w/Period

**Status**  
Customer-specific  
Employment 3 Active  
Special payment 1 Standard wage type

**Organizational assignment**  
Position 65001875 Lighting And Interactive  
Personnel area 4601 Cultural Resources  
Employee group A SPA Employees  
Employee subgroup A1 FT N-FLSAOT Perm

**Additional actions**

Start Date	Act.	Action Type	ActR	Reason for action

27. Click the **Enter** button.

Record valid from 01/01/2008 to 12/31/9999 delimited at end

The system will provide a yellow warning message informing you the existing record will be delimited. Click Enter past this warning message.

Notice at the top of this screen the title includes the word “Copy”. This action takes the original action and makes a copy of it, delimiting the previous record and saving the new record. The word “Create” in the title indicates that this infotype is being created on this person's record for the first time.

Person and position have different employee groups/subgroups

When the employee subgroup is different from the position employee subgroup you will receive a warning message. Click **Enter**  to continue.

Best practice is to review all data, and click Enter to allow the system to validate the data.



28. Click **Edit, >> Maintain text** to add your comment based on agency or OSHR Policy/Guidelines.



29. Click the **Enter**  button.
30. Click the **Save (Ctrl+S)**  button.

### Create Organizational Assignment (0001)

Org Structure

Personnel No 80000610 Name Susan Castro

EEGroup A SPA Employees PersA 4601 Cultural Resources

EESubgroup A1 FT N-FLSAOT Perm Statu Active

Start 08/04/2011 to 12/31/9999

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Enterprise structure

CoCode NC01 STATE OF NC

Pers.area 4601 Cultural Resources Subarea NC01 7day Norm

Cost Ctr 4699999999 CULTURE RESOU... Bus. Area 4600 Cultural Resources

Fund 469999999 CULTURE- SUSP...

Func. Area 60000000000000000000 General Government

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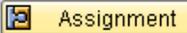
Personnel structure

EE group A SPA Employees Payr.area 01 NC Monthly

EE subgroup A1 FT N-FLSAOT Perm Contract S1 SHP Full EECa...

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Organizational plan

Percentage 100.00  Assignment

Position 65001875 800904000859  
Lighting And Interactiv...

Job key 30001528 Msm Spl  
Museum Specialist

Org. Unit 20010310 48080102695  
CR CDS A&H MOH D...

Org.key 46014699999999

31. Click the **Enter**  button.

Enter the Contract if required. The Contract key identifies eligibility for Medicare, less than 5 yrs for STD, and the Rehire of Retiree statuses.

 **CRITICAL!** If the contract field is completed on the previous IT0001, it will copy to the new IT0001.

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

32. Click the **Save (Ctrl+S)**  button.

### Create Monitoring of Tasks (0019)

Personnel No: 80000610      Name: Susan Castro

EGroup: A SPA Employees      PersA: 4601 Cultural Resources

EESubgroup: A1 FT N-FLSAOT Perm      Statu: Active



**Task**

Task Type: 08 S/T Disability 60day

Date of Task: 10/04/2011      Processing indicator: New task

**Reminder**

Reminder Date: 08/05/2011

Lead/follow-up time:      For specific task type

**Comments**

Check with the Supervisor/Employee on disability status - if employee hasn't returned - create next action

33. Update the following fields:

Field Name	Description	Values
Task Type	Select appropriate task type from list	Select task type <b>Example:</b> S/T Disability 60day
Date of Task	Date on which the task occurs	Enter value in Date of Task. <b>Example:</b> 10/04/2011
Comment	Additional information about an item	Enter value in Comment. <b>Example:</b> Check with the Supervisor/Employee on disability status – if employee hasn't returned – create next action

**NOTE:** You may need to create additional IT0019's via PA30. You can run either the Date Monitoring report S\_PH0\_48000450 or BI Report – B0099 – Employee Deadline Dates. Managers can view for their employees via MSS.

(Example Only) 

Monitoring of Tasks			
Status	Date	Reminder	Task
New task	9/14/2007	8/14/2007	Credential Verificat
New task	9/7/2007	8/7/2007	Military

- 34. Click the **Enter**  button.
- 35. Click the **Save (Ctrl+S)**  button.

**Delimit Objects on Loan (0040)**

Personnel No: 80000610      Name: Susan Castro

EEGroup: A      SPA Employees      PersA: 4601      Cultural Resources

EESubgroup: A1      FT N-FLSAOT Perm      Statu: Active

Choose: 08/04/2011      To: 12/31/9999      STy.:      Delimit.Date: 08/04/2011

Overview						
Start Date	End Date	Object on lo...	Name	No.	Loan object number	
01/01/2008	12/31/9999	01	State ID		1 5551735	

- 36. Highlight and click the **01/01/2008** row.
- 37. Click the **Delimit (Shift+F1)**  button

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

**Copy Planned Working Time (0007)**

Personnel No: 80000610      Name: Susan Castro

EEGroup: A      SPA Employees      PersA: 4601      Cultural Resources

EESubgroup: A1      FT N-FLSAOT Perm      Statu: Active

Start: 08/04/2011      To: 12/31/9999

Work schedule rule

Work schedule rule: D01N086N      MTWHF-8,SaS-O

Time Mgmt status: 1 1 - Positive Time Recording

Working week: 07 Wk - Sun (mdnt) - Sat

Part-time employee

Working time

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 workdays:

38. Update the following fields:

Field Name	Description	Values
Work Schedule Rule	A pattern of scheduled work days and scheduled non-work days.	Enter Work schedule rule  <b>Example:</b> D01N08GN
Time Mgmt status	Used in Time Evaluation processing	Enter value  <b>Example:</b> Positive Time Recording

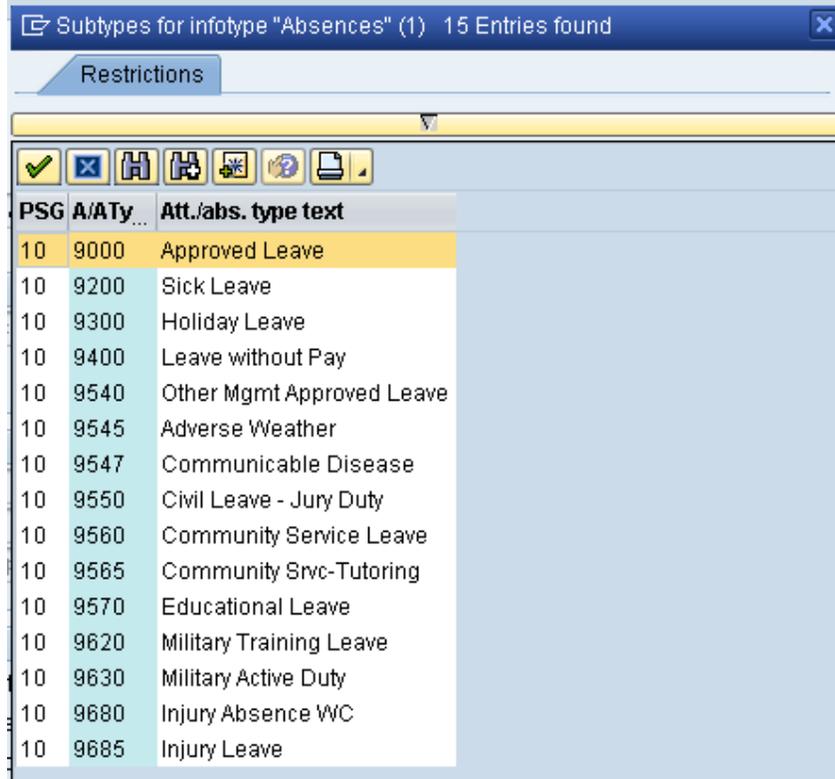
All full-time employees **must** be on a 5 day 8 hour per day work schedule. The easiest way to accomplish this is to use **D01N08GN**. **All employees, whether full-time or part-time, must be positive time recording.**

For part-time employees, select an equivalent work schedule M-F. Example – PT EE 36 hrs equivalent schedule would be 5 x 7.2 = WSR DD9N1001

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

39. Click the **Enter**  button.

40. Click the **Save (Ctrl+S)**  button.



41. Select the **Sick Leave** code in the list box.

42. Click the **Enter**  button.

Choose the applicable leave type to indicate if the employee is to receive pay and if so from which type. Another option is to indicate that the employee is not to accrue leave or longevity while on unpaid leave. The codes are selected as follows:

- If the employee has requested to use leave while on LOA, select the appropriate type from the list.
- If the employee is not using leave and code 9400 (LWOP) is not applicable, click the X to close.

**Create Absences (2001)**

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

Personnel No: 80000610 Name: Susan Castro  
 EE group: A SPA Employees Personnel ar: 4601 Cultural Resources  
 WS rule: D01N086N MTWHF-8,SaS-O Status: Active  
 Start: 08/04/2011 To: 08/31/2011

**Absence**

Absence type: 9200 Sick Leave  
 Time: -  Prev.day  
 Absence hours: 160.00  Full-day  
 Absence days: 20.00  
 Calendar days: 28.00  
 Quota Used: 160.00 Hours

**Advance payment**

Off-cycle reason:   
 Payment date:   
 Payroll Identifier:   
 Payroll type:

43. Update the following field:

Field Name	Description	Values
To Date	Reflects the number of hours of leave the employee wants to use (or for code 9400 if unpaid leave).	Enter Date Value <b>Example:</b> 08/31/2011

The Absences infotype only displays if you selected a leave type from the subtype for Absences pop-up.

The Absences infotype (2001) indicates the number of hours the employee wants to use for leave and deducts from the leave quotas as applicable. If the employee should not accrue leave or longevity while on unpaid leave, enter Time Code 9400 (LWOP) in IT2001. Once you enter the date and hit enter the system will automatically calculate the number of absence hours and days, these numbers default based on the work schedule rule on IT0007. The dates that are used on the infotype:

- The "start date" should automatically pre-populate based on the effective date of the LOA Action.
- Enter the "to date" to reflect the number of hours of leave the employee wants to use (or for code 9400 if unpaid leave). Never enter 12/31/9999 as the "to date".



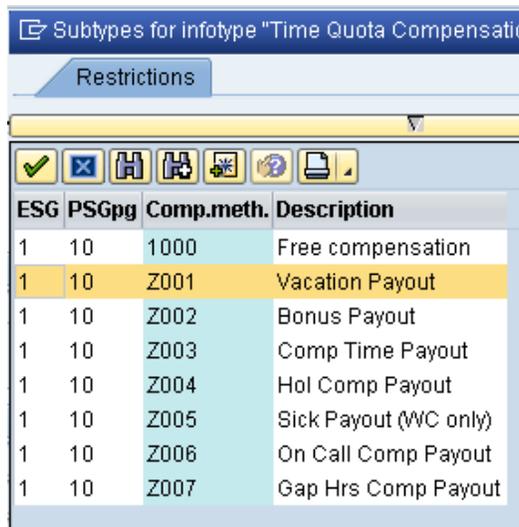
**Information** **Using leave accrued while out on leave:** If an employee wants to use the time that was accrued while he or she was out on paid leave, you will have to create a new IT2001 via PA30 in order to enter the new leave time.

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

*Absences (2001) Example with Holidays – see PA420 Leave of Absence Student Guide*

**Information** **Best Business Practice:** Create IT2001 to exhaust leave on a monthly basis rather than the entire LOA period.

- 44. Click the **Enter**  button.
- 45. Click the **Save (Ctrl+S)**  button.
- 46. Select the **Vacation Payout** code in the list box.



ESG	PSGpg	Comp.meth.	Description
1	10	1000	Free compensation
1	10	Z001	Vacation Payout
1	10	Z002	Bonus Payout
1	10	Z003	Comp Time Payout
1	10	Z004	Hol Comp Payout
1	10	Z005	Sick Payout (WC only)
1	10	Z006	On Call Comp Payout
1	10	Z007	Gap Hrs Comp Payout

- 47. Click the **Enter**  button.

Choose the appropriate type of leave to be paid out.

An employee can only request a lump sum (one time) payment of leave during a Military LOA or Short-Term Disability LOA. Select the applicable leave type if the employee has requested a lump sum (one time) payment of leave instead of receiving it via regular pay disbursement. The employee cannot request leave both via regular pay disbursement (entered by HR on IT2001) and lump sum payment at the same time.

**NOTE:** Only complete IT0416 if using reason 22 – Short-Term Disability (Lump Sum)

### Create Time Quota Compensation (0416)

Compensate

Personnel No  Name   
 EE group  Personnel ar  Cultural Resources  
 WS rule  MTWHF-8,SaS-O Status   
 Start    
 Comp. method  Vacation Payout

Compensation specifications

Time quota type  Vacation Leave

Compensation rule

No. to compensate

Absence quotas								
	ATy	Quota text	Entitl.	Unit	Comp.	Rem.	WT	Ar
	10	Vacation Leave	286.65000	Hours	0.00000	286.65000		
	15	Sick Leave	333.11000	Hours	0.00000	173.11000		
	40	Holiday Leave	8.00000	Hours	0.00000	8.00000		
	40	Holiday Leave	8.00000	Hours	0.00000	8.00000		
	65	Community Service Lea...	24.00000	Hours	0.00000	24.00000		

48. Update the following field:

Field Name	Description	Values
No. to compensate	The number of hours to compensate.	Enter Value in No. to compensate  <b>Example:</b> 160

49. Click the **Enter** button.

The system will show you the number of hours per quota type available for compensation. Enter the total number of hours to be paid out for the quota type chosen here.

**NOTES:**

Do not change the effective date as you do in the Separation Action. Time evaluation is run nightly, so the balances should be current each day.

The balances are current based on the time the Time Administrator or Supervisor has approved.

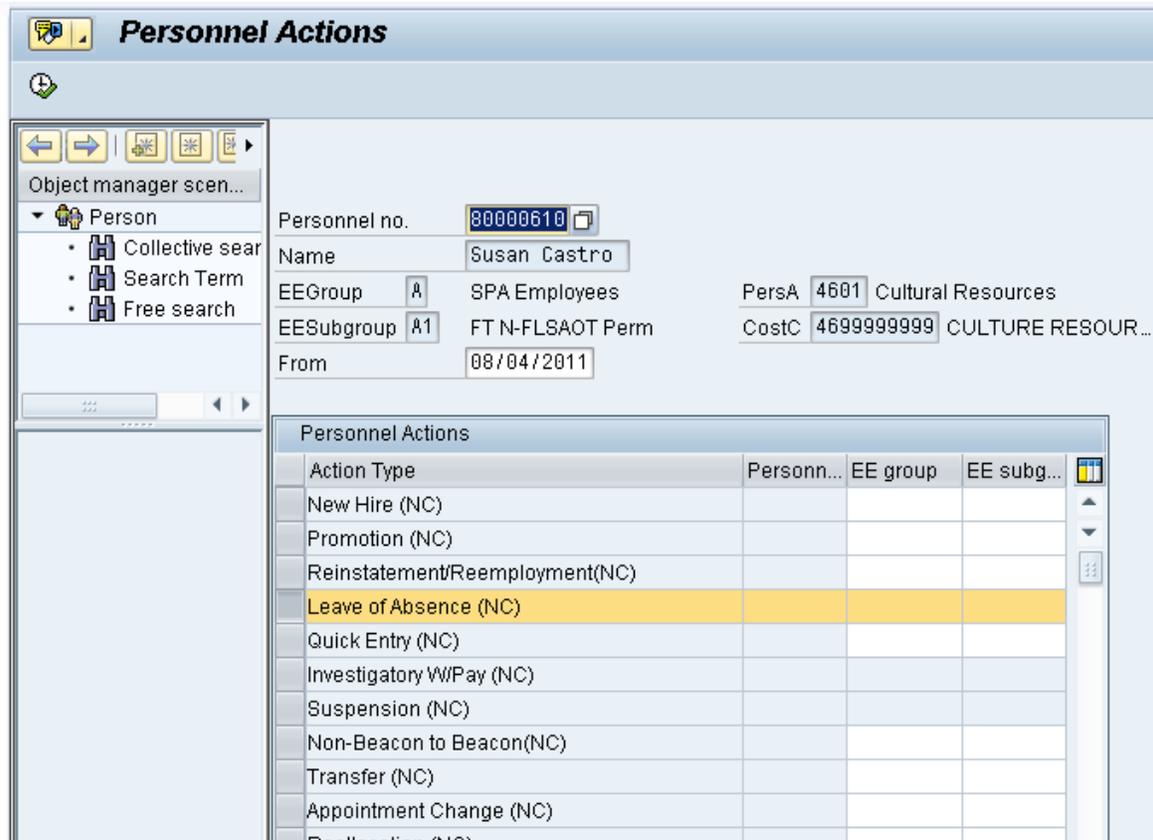
If the employee has indicated a request for lump sum payment and has more than one type to be paid, you must use PA30 after you complete the LOA Action to select and enter the additional subtypes for IT0416.

**CRITICAL!** It is critical to ensure that all time has been entered, released, approved and that time evaluation has run before entering the LOA Action.

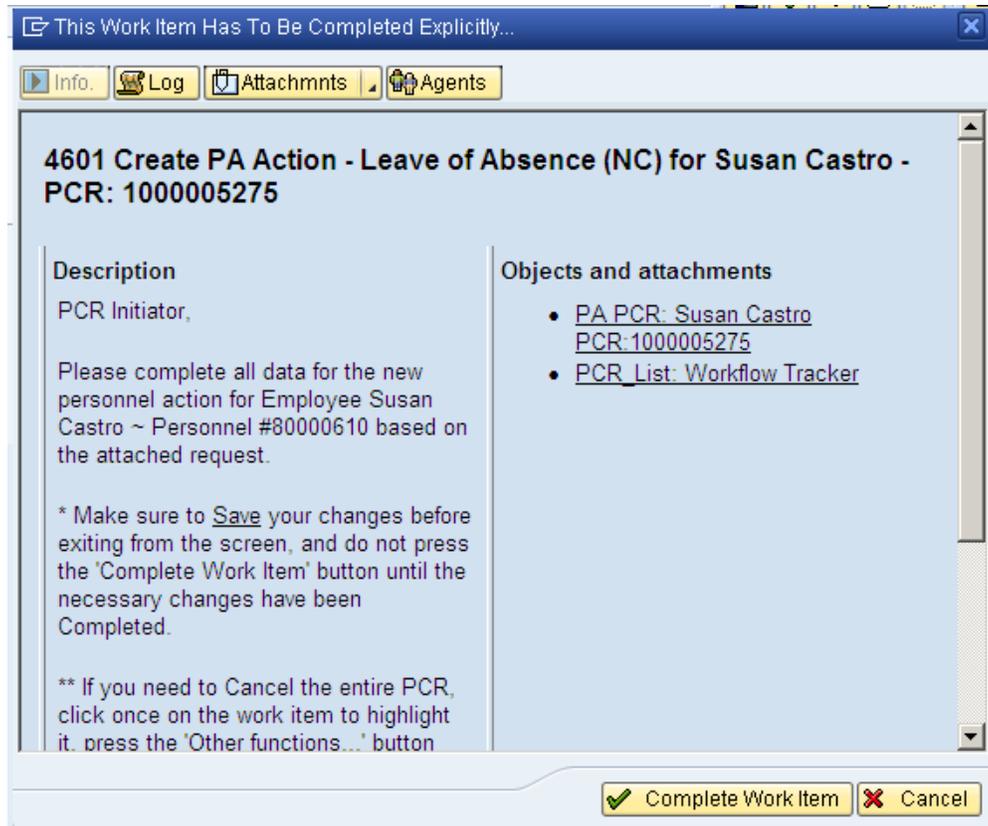
50. Click the **Save (Ctrl+S)**  button.

51. Click the **Next record (Shift+F7)**  button.

If the balances are not ready to payout, skip and create by using transaction code PA30.

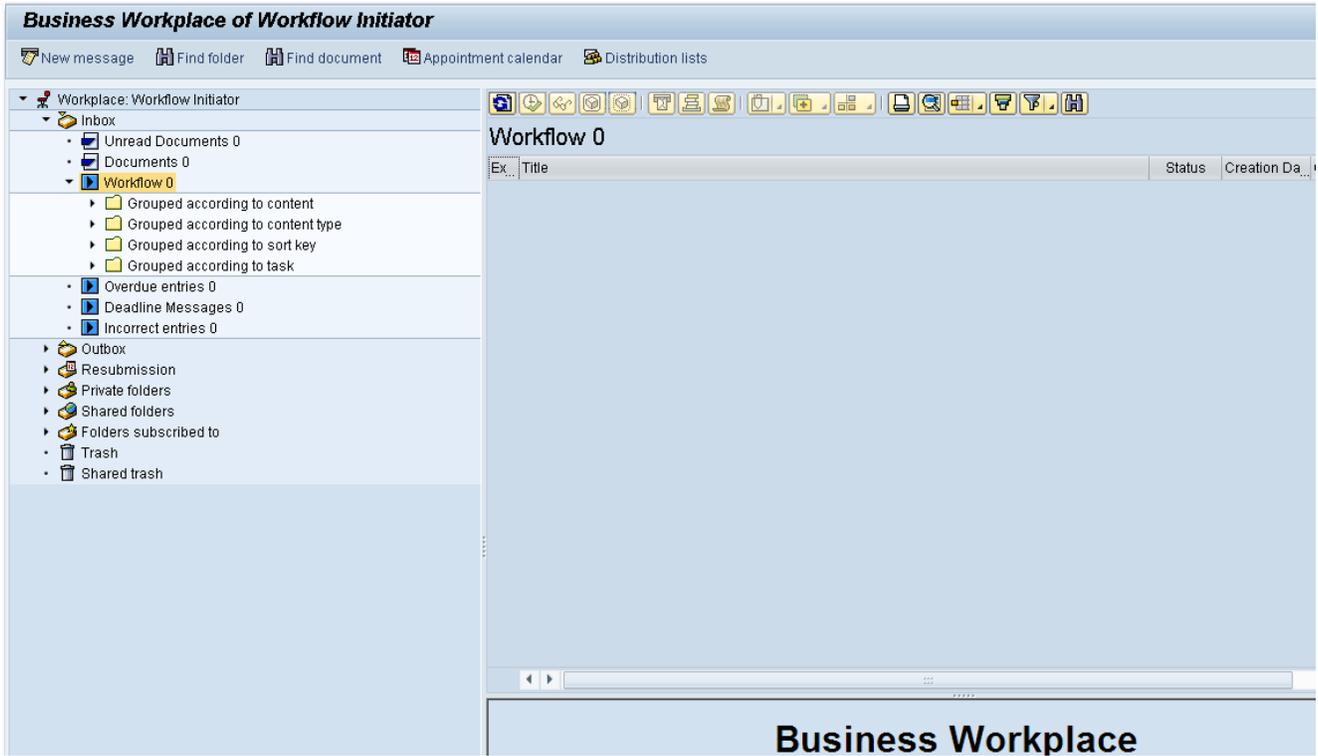


52. Click the **Back (F3)**  button.



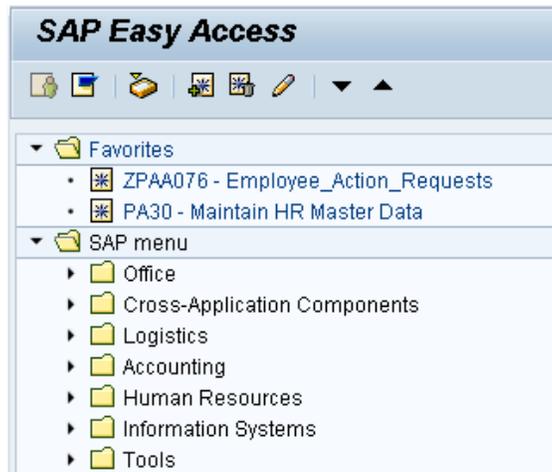
53. Click the **Complete Work Item**  button.

Only once all of the infotypes screens within the action have been processed and the system has returned you to the main screen will this Complete button be visible. Now you may complete the PCR in workflow.



54. Click the **Back (F3)**  button.

You may remain in this SAP Business Workplace and process additional PCR's, or click the Back to return to the main SAP Easy Access screen.



55. The Leave of Absence Action Short-Term Disability is complete, but we recommend reviewing via PA20 all infotypes that have been processed.

## Short-Term Disability Payment Process

You must create infotype 2010 Employee Remuneration Info via PA30 when employee is receiving Short-Term Disability payments. The monthly benefit payments during the STD period cannot exceed \$3,000.

### Process

- STD Specialist completes Forms 714 and 711
- Doctor completes Form 703
- Employee returns Form 703 to STD Specialist every 30 days. Exception: Approved DIP-7
- STD Specialist processes (STD payment) via PA30, creating an IT2010.
- The IT2010 is created when Form 703 is received.

**NOTE:** The effective date of the IT2010 should be for the month in which the doctor approved the Form 703.

### Access Transaction:

Via Transaction Code:	PA30
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## PROCEDURE

The screenshot shows the SAP 'Maintain HR Master Data' interface for employee Susan Castro (Personnel no. 80000610). The 'Basic Personal Data' tab is active. The 'Infotype text' list on the left shows '2010' selected. The 'Period' section on the right is configured with 'From' and 'To' date fields, and radio buttons for 'Today', 'All', 'From curr. date', 'To Current Date', 'Current Period', 'Curr.week', 'Current month', 'Last week', and 'Current Year'. A 'Choose' button is visible below the radio buttons. The 'Direct selection' section at the bottom shows 'Infotype' set to '2010' and 'Sty' as an empty field.

56. Enter **Infotype 2010**.

57. Click the **Create**  button.

**Create Employee Remuneration Info (2010)**

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

Personnel No: 80000610 | Name: Susan Castro  
 EE group: A SPA Employees | Personnel ar: 4601 | Cultural Resources  
 W/S rule: D01N086N MTWHF-8,Sa8-O | Status: Active  
 Date: 08/04/2011

Remuneration info

Wage type: 1332

Number of hours: | Number/unit: | Amount: | Currency: | Extra pay/valuation: | Pay scale group/level: | Position/work center: | Overtime comp. type: | Premium: | Premium Indicator: | Tax area record type: | External document number: |

Wage Types for Infotype "Employee Remuneration Info" (1) 79 Entries found

WT	Wage Type Long Text	Start Date	End Date
1205	Temporary Hours	01/01/1900	12/31/9999
1332	STD 1st 6 Months w/ st tx	01/01/1990	12/31/9999
1333	STD 1st 6 Months no st tx	01/01/1990	12/31/9999
1334	STD 2nd 6 months w/ st tx	01/01/1990	12/31/9999
1335	STD 2nd 6 months no st tx	01/01/1990	12/31/9999
1352	Admissions Unit Pay	01/01/1900	12/31/9999
1353	Investigatory Shift Pay	01/01/1900	12/31/9999
1411	Temporary Training IRA	01/01/1900	12/31/9999
1422	Balance of Contract Pay	01/01/1990	12/31/9999

58. Enter the effective date in the Date field.
59. Select appropriate Wage Type & Enter the Amount in the Amount field
60. Click the **Enter**  button.

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

**Amount limit**-You can only enter \$3k for the current pay period. If an employee presents forms 703 for several months past, you must enter each month separately with the applicable effective date. You can enter several months separately on the same day (with the different applicable effective dates for the 703), as long as the \$3k total for the current pay period is not exceeded. For example, an employee has been on LOA –STD since 4/1/08. On 8/15/08 the employee brings in 703s for April, May, June, July, and August. Based on the calculations, the benefit is determined to be \$985. On 8/15, you can enter the following:

- 2010 with effective date of 4/1 for \$985
- 2010 with effective date of 5/1 for \$985
- 2010 with effective date of 6/1 for \$985

In this scenario, you will have to wait until the next pay period to enter the amounts for July and August. At that time you can also enter the current (September) amount thereby catching up all past amounts and making the 2010 current.

The following wage types are used as applicable. It is critical that you key the correct wage type for **first** and **second** six months.

**1332** –Select if employee did not have five or more years of service as of 8/12/1989 for the *first* six months of Short -Term Disability (STD). Benefits are subject to state income tax.

**1333** -Select if employee had five or more years of service as of 8/12/1989 for first six months of STD. Benefits are not subject to state income tax.

**1334**-Select if employee did not have five or more years of service as of 8/12/1989 for *second* six months of STD. Benefits are subject to state income tax.

**1335**-Select if employee had five or more years of service as of 8/12/1989 for second six months of STD. Benefits are not subject to state income tax.

**Pre-SAP Remuneration** –if the employee is owed STD benefit payments that were due prior to your Agency SAP go-live date, you need to date IT2010 prior to 5/31/08. By using a date prior to 5/31/08, the Wage type drop down list changes to include wage types for pre-SAP, including 19SD, 19SS, 19ST, and 19DS. The \$3k limit rule does not apply to pre-SAP remuneration.

**NOTE:** For the first six months beginning the first of the month after the last month worked, any benefits payable under the Plan are subject to FICA (Social Security) taxes. Payments made more than six months after the last calendar month you worked are not subject to FICA taxes.

**Create Employee Remuneration Info (2010)**

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

Personnel No: 80000610 | Name: Susan Castro  
EE group: A SPA Employees | Personnel ar: 4601 | Cultural Resources  
WS rule: D01N086N MTWHF-8,SaS-O | Status: Active  
Date: 08/04/2011

Remuneration info

Wage type: 1332 STD 1st 6 Months w/ st tx

Number of hours: [ ]  
Number/unit: [ ] / [ ]  
Amount: 1,000.00  
Currency: USD  
Extra pay/valuation: [ ] / [ ]  
Pay scale group/level: [ ] / [ ]  
Position/work center: [ ] / [ ]  
Overtime comp. type: Depends on wage type  
Premium: [ ]  
Premium Indicator: [ ]  
Tax area record type: [ ]  
External document number: [ ]

61. Click the **Save (Ctrl+S)**  button.



62. Click the **Back (F3)**  button.

## ADDITIONAL RESOURCES

Links to:

<p><b>Student Guides</b></p>	<p><b>PA370 – Short-Term Disability</b></p> <ul style="list-style-type: none"> <li>• <i>Training HELP website &gt; Student Guides</i></li> </ul> <p><b>PA420 – Leave of Absence</b></p> <ul style="list-style-type: none"> <li>• <i>Training HELP website &gt; Student Guides</i></li> </ul>
<p><b>Job Aids</b></p>	<p><b>Monitoring of Tasks</b></p> <ul style="list-style-type: none"> <li>• <i>Training HELP website &gt; PA &gt; Job Aids</i></li> </ul> <p><b>LOA Requirements</b></p> <ul style="list-style-type: none"> <li>• <i>Training HELP website &gt; PA &gt; Job Aids</i></li> </ul>