



Exercise Guide for

PA420

Leave of Absence

Disclaimer: The position action scenarios and exercises included in this course have been created solely for the purposes of training.

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Exercise 2.2 – LOA - FMLA

ZPAA076

Scenario


Janet Thomas is a permanent employee who works at the Department of Commerce. She has the following leave balances: 240 sick and 240 vacation. Effective today, she is going out on FMLA due to her husband's serious medical condition. She expects to be out for a total of 12 weeks. Janet has not indicated that she wishes to use any of her leave for this LOA.

There are three parts to this Exercise but you will only be responsible for Parts I and III.



- I. Initiate Workflow (WF)
- II. Watch as Instructor demonstrates the Agency approval process
- III. Complete Approved PCR from the Initiator's Inbox

Part I – Initiate Workflow (WF) as Initiator

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





1. On the Easy Access screen, type **ZPAA076** in the Command field.
2. Click **Enter** . The Employee Action Request screen is displayed.
3. Enter the following data:

Field	Value
Personnel number	Use the Janet Thomas personnel number that is assigned to your student number from the Data Set.
Effective on	Today's date
Action Type	Leave of Absence
Reason	FMLA

4. Click **Enter** .
5. Click **Create** . The second screen of the Employee Action Request screen is displayed.

6. Enter the following data:


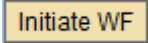

Field	Value
Annual Salary	Same as her current salary (hint: look in Current column)

7. Click **Enter** .
8. Click **Save** . The Information pop-up is displayed with the assigned PCR number.
9. Write the **PCR number** on your LOA paperwork (in class, use your Exercise Guide).
10. Click  to close the pop-up.
11. Click **Services for Object** .

NOTE: This button is not available until you have saved the Employee Action Request. The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon.

12. Select **Create > Create Note**.
13. Enter a **note title**.
14. Click in the note section and write the applicable information to send along with the PCR. Begin the note with your name and the date.

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

15. Click the **green check**  to close the notes. If applicable, close the notes icon menu.
16. Click . The Information pop-up is displayed indicating that the PCR has been submitted.
17. Click the **green check**  to close the Information pop-up. You are returned to the Employee Action Request (first screen).
18. Click the **BACK** button to return to the Easy Access screen.

Part II – Watch as the Instructor demonstrates the Agency approval level




There is one approval level:

- Agency

Your instructor and/or navigator will perform this part.

Part III – Complete Approved PCR from Initiator's Inbox

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

19. From the Easy Access screen, click **SAP Business Workplace** 
20. Click the **node** beside Inbox  **Inbox** to expand it.
21. Before you process the PCR, make a copy of the note in order to paste it into the Actions infotype:
 - Select (do not double-click) the Workflow to select it.
 - At the bottom of the screen, click the “**header**” (not tracker) link: PA PCR xxxxx ##### (where X and # represent employee's name and PCR number).
 - At the Employee Action Request screen, click the **Services for Object** button to review the notes or attachments.
 - Select **Attachment List**.
 - Highlight the **line item** for the note.
 - Double-click or use the eyeglasses.
 - Highlight the entire note, including the title.
 - Right-click and select **Copy**. You can either keep the copied note in the clipboard for use later, or paste it to a Word document for later use. **Do not leave the PCR open in a second session.**
 - Click **X** to close the Display note pop-up.
 - Click **X** to close the Services for Objects pop-up. It is a best practice to make sure the PCR is closed before you process the approved PCR Actions because an open PCR uses a lot of memory.
 - Click the **Back** button.
22. With the PCR still selected, click the **Execute**  (or double-click the PCR line item). The system automatically takes you to the applicable screen for the Action (in this exercise, it is the Personnel Actions screen).

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

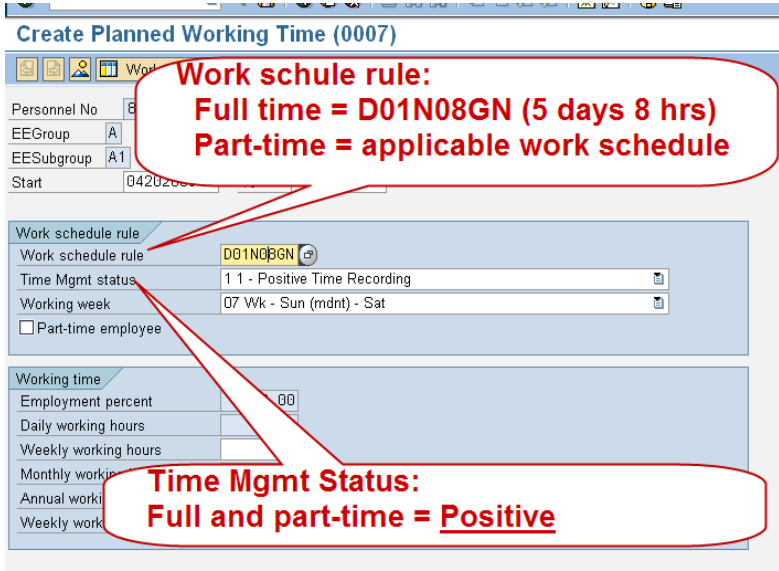
Field	Value
From	Today's date (should always be the same that you entered on PCR).
Action Type	Leave of Absence (Highlight and select)

24. Click **Execute** .

25. Complete the following fields:

Infotype/Field	Value
Actions (IT0000)	
Reason for Infotype	Observe the field defaulted from PCR.
Reference Per. No.	Leave blank.
Position	Observe the field defaulted from PCR.
Emp. Group / Subgroup	Observe the field defaulted from PCR.
Enter note copied from PCR	From the menu bar: <ul style="list-style-type: none"> • Select Edit. • Maintain text. • Press Enter if a warning message displays indicating that person and position have different group/subgroup • Use Ctrl+V (or use the Insert button) to paste the note from the PCR. • Click Save. • Click Enter and Save as needed to bypass warning messages again.
Organizational Assignment (IT0001)	Enter and Save NOTE: If the Contract field is completed on the previous IT0001, it will copy to the new IT0001.
Monitoring of Tasks (IT0019)	
Task Type	Estimated Return Date

Infotype/Field	Value
Date of Task	Use the calendar icon to select the date when the 12 weeks will end.
Reminder Date	When you press Enter, the reminder date field automatically populates. Change if applicable.
Comments	<p>NOTE: Since the comments do not wrap at the end of the line, use the <i>Edit > Maintain Text</i> function located on the menu bar to add the comments below to the infotype. Remember to start any comments with your name and the date. In your work environment, write whatever notes are required by your Agency. In class, we are only entering short notes for expediency. Enter the following:</p> <p><your name, date> The employee is expected to return to work at the end of 12 weeks.</p> <p>Click Save to save the note. Observe the note icon displays as part of the infotype.</p> <p>Click Save again to save the infotype.</p> <p>To view a list of your tasks, you must run the SAP report <i>Date Monitoring Report (transaction S_PHO_48000450)</i> or the BI report <i>B0099- Employee Deadline</i>.</p>
Delimit Objects on loan (IT0040)	<p>Click Next Record icon.</p> <p>In your work environment, follow your Agency's policy regarding whether or not employees return items while out on leave. If the employee returns the items, you would then delimit the infotype.</p>

Infotype/Field	Value
Planned Working Time (IT0007)	<p>Make the following selections:</p> <ul style="list-style-type: none"> Enter D01N08GN in the Work schedule rule field. Change the Time Mgmt status to Positive Time Recording  <p>IMPORTANT!</p> <p>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.</p> <p>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</p> <p>A 28 day employee will remain on the 28-day working week as long as they are exhausting leave. The working week should be changed to the normal agency specific working week on the 1st day they use LWOP. The work schedule rule is still changed to D01N08GN.</p> <p>NOTE: When you reinstate an employee, the IT0007 displays as part of the Reinstatement/Reemployment Action. At that time, you will assign the employee to the applicable full-time or part-time work schedule they had when they went out. You will also change the Time Mgmt Status field back to negative time if the employee was negative time prior to the LOA.</p> <p>Enter and Save.</p>

Infotype/Field	Value
Subtypes for infotype Absences pop-up	If the employee should not accrue leave or longevity while on unpaid leave, enter Time code 9400 (LWOP) in IT2001.
Subtypes for infotype Time Quota Pop-up	X (close) out for this scenario because the employee has not elected to receive a lump sum payout.

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

27. Click **Complete Work Item** .

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

Questions

Answer the following questions.

Question 1

When the employee returns to work from a leave of absence, what Action will you use to return the employee?

-

Question 2

What purpose does the Monitoring of Tasks infotype serve?

-

Question 3

Where do you receive a list of the tasks that you have entered in the Monitoring of Tasks Infotype?

-

Question 4

Assume that 12 weeks have passed and Janet indicates she needs an additional 3 weeks to care for her husband. She has the proper documentation. What steps do you take?

-

This exercise is complete.

Exercise 2.3 – LOA – Military Training

ZPAA076

Scenario

Ray Cryar has been given orders to report the first day of next month for 120 hours of military training. According to PT50, Ray does not have 120 military training left. That means that Ray will have to either go on some hours of unpaid leave or use his accrued leave for the remaining hours. Ray has decided to use vacation. You will have to determine how many hours vacation to use and then process the leave accordingly.

Instructions


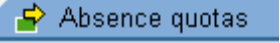
The LOA Action has four parts; however you will only be responsible for Parts I, III and IV.

- I. Initiate Workflow (WF)
- II. Wait as Instructor processes the Agency (LOA does not go to Funding Approver)
- III. Process Approved PCR
- IV. Process PA30 to use vacation for remaining hours

LOA #1 (process military training hours)


Part I – Initiate Workflow (WF) as Initiator

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





1. Enter **PT50** in the Command field on the Easy Access screen and press or click **Enter**.
2. Enter the employee's personnel number and press or click Enter.
3. For training purposes, Click  **All** . **In production, also include the validity periods of 10/01/last year to 9/30/this year as military fiscal years begin on October 1, and this will ensure correct quota displayed.**
4. Click  . The Quota Overview screen displays.
5. Write down the number of hours shown in the Rem. Column of the following leave types:
 - Military Leave Training _____
 - Vacation _____

6. Based on the number of Military Leave Training hours available, how many vacation hours must be used in order to complete the 120 hours of leave? _____
7. Enter **/nZPAA076** in the Command field from the Quota Overview screen.
8. Click **Enter**. The Employee Action Request screen displays.
9. Enter the following data:

Field	Value
Personnel number	Use the Data Sheet Ray Cryar personnel number that is assigned to your student number.
Effective on	First day of next month
Action Type	Leave of Absence
Reason	Military Training

10. Click **Enter**.
11. Click **Create** . The second screen of the Employee Action Request screen is displayed.
12. Enter the following data:

Field	Value
Annual Salary	Same as the current salary (hint: look in Current column)

13. Click **Enter** .
14. Click **Save** . The Information pop-up is displayed with the assigned PCR number.
15. Write the **PCR number** on the employee paperwork (in class, use the Data Sheet).
16. Click  to close the pop-up.
17. Click **Services for Object** .

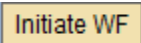
NOTE: This button is not available until you save the PCR. The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon. Private notes can only be seen by the Initiator.

18. Select **Create > Create Note**.
19. Enter a **note title**.

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

NOTE: The notes that you write are only recorded in the Workflow PCR; they do not follow in the PA Action. Private notes can only be seen by the person who created them.

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

22. Click . The Information pop-up displays indicating that the PCR has been submitted.

23. Click the **green check** to close the Information pop-up. You are returned to the Employee Action Request (first screen).

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


Part II – Wait for Instructor or Navigator to Approve the PCR

There is one approval level:

- Agency

Your instructor and/or navigator will perform this part.

Part III – Process Approved PCR from Initiator Inbox


25. From the Easy Access screen, click SAP Business Workplace .

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

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


- Select (do not double-click) the PCR to select it.
- At the bottom of the screen, click the Ad hoc object “header” (not tracker) link: PA PCR xxxxx ##### (where X and # represent employee’s name and PCR number).
- At the Employee Action Request screen, click the **Services for Object** button to review the notes or attachments.
- Select **Attachment List**.
- Highlight the line item for the note.
- Double-click or use the eyeglasses.
- Highlight the entire note, including the title.
- Right click and select **Copy**. You can either keep the copied note in the clipboard for use later, or paste it to a Word document for later use. **Do not leave the PCR open in a second session.**

- i. Click **X** to close the Display note popup.
- j. Click **X** to close the Services for Objects pop-up.
BEST PRACTICE: After viewing the PCR, you should return to your Inbox to process the action.
- k. Click the **Back** button.

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

29. On the Personnel Actions screen, enter:

Field	Value
From	First of next month.
Action Type	Leave of Absence. (Highlight and select)

30. Click **Execute** . The Personnel Actions screen is displayed with an assigned personnel number.

Infotype/Field	Value
Start	Today's date (the date on this screen should always be the same date as you entered on the PCR).
Action Type	Leave of Absence defaults

31. Complete the following fields:

Infotype/Field	Value
Actions (IT0000)	
Reason for Action	Observe the field defaulted from PCR.
Reference Per. No	Leave blank
Position	Observe the field defaulted from PCR
EE Group/Subgroup	Observe the field defaulted from PCR Enter and Save

Infotype/Field	Value
Enter note copied from PCR	From the menu bar: <ul style="list-style-type: none"> • Select Edit. • Maintain text. • Press Enter if a warning message displays indicating that person and position have different group/subgroup • Use Ctrl+V (or use the Insert button) to paste the note from the PCR. • Click Save. • Click Enter and Save as needed to bypass warning messages again.
Organizational Assignment (IT0001)	Enter and Save NOTE: If the Contract field is completed on the previous IT0001, it will copy to the new IT0001.
Monitoring of Tasks (IT0019)	
Task Type	Estimated return date
Date of Task	Starting with first of next month, count calendar days necessary to signify the end of the hours military training leave the employee will be gone (in this scenario, the employee has orders for 120 hours).
Reminder Date	When you press Enter, the reminder date field automatically populates. Change if applicable.

Infotype/Field	Value
<p>Comment</p>	<p>NOTE: Since the comments do not wrap at the end of the line, use the <i>Edit > Maintain Text</i> function located on the menu bar to add the comments below to the infotype. Remember to start any comments with your name and the date. In your work environment, write whatever notes are required by your Agency. In class, we are only entering short notes for expediency. Enter the following:</p> <p><your name, date> Check to see if employee has returned on 121st day and reinstate if needed.</p> <p>Click Save to save the note. Observe the note icon displays as part of the infotype.</p> <p>Click Save again to save the infotype.</p> <p>To view a list of your tasks, you must run the <i>Date Monitoring Report</i> (transaction S_PHO_48000450) or BI report <i>B0099 – Employee Deadline</i>.</p>
<p>Delimit Objects on Loan (IT0040)</p>	<p>Click Next Record icon.</p> <p>In your work environment, follow your Agency’s policy regarding whether or not employees should return items while out on leave. If the employees return the items, then you would delimit the infotype.</p>
<p>Planned Working Time (IT0007)</p>	<p>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.</p> <p>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</p> <p>A 28 day employee will remain on the 28-day working week as long as they are exhausting leave. The working week should be changed to the normal agency specific working week on the 1st day they use LWOP. The work schedule rule is still changed to D01N08GN.</p> <p>NOTE: When you reinstate an employee, the IT0007 displays as part of the Reinstatement/Reemployment Action. At that time, you will assign the employee to the applicable full-time or part-time work schedule they had when they went out. You will also change the Time Mgmt Status field back to negative time if the employee was negative time prior to the LOA.</p> <p>Enter and Save.</p>

Infotype/Field	Value
Subtypes for infotypes Absences	Select 9620 Military Training Leave . IMPORTANT! It is critical that you select this leave type so that the employee is paid from that leave “bucket”.
Absences (IT2001)	
Start and to dates	Start date: The date should default from the LOA effective date (first day of next month) To date: Enter the date which is applicable for the number of leave hours being used from that “bucket”. Click Enter . Observe the <i>Quota Used</i> field to ensure that the date you entered calculated the hours correctly. If necessary, change the ‘to’ date until the calculation is correct. Click Save when the hours accurately calculate.
Subtypes for Time Quota Compensation Pop-up (IT0416)	Click Close .

32. Click the **Back** button at the Personnel Actions screen (the system automatically returns you to Personnel Actions when you finish the last infotype within the Action).

33. The pop-up is displayed indicating that the item must be explicitly completed.

Click **Complete Work Item** .

NOTE: It is critical that you complete this last step.

You must now enter the hours of vacation the employee wants to use in order that he is paid during the entire 120 absence hours.

Part IV – PA30

34. Enter **/nPA30** in the Command field from the Workflow screen.

35. Enter **2001** in the infotype field, and select Approved Leave from the drop down menu in the subtype field.


36. Click **Create** .

37. Complete the following fields:

Infotype/Field	Value
Absences (IT2001)	
Start and to dates	<p>Start date: Enter the date that equals the 81st day of the LOA (the next day <u>after</u> the “to” date entered in IT2001 in Part A of the exercise). Your date will not always be the 81st day. This is for the purpose of this training exercise.</p> <p>To date: Enter the date which is applicable for the number of leave hours being used.</p> <p>Click Enter.</p> <p>Observe the <i>Quota Used</i> field to ensure that the date you entered calculated the hours correctly. If necessary, change the ‘to’ date until the calculation is correct.</p> <p>Click Save when the hours accurately calculate.</p>

38. Remove the subtype from the subtype field so that only 2001 displays in the infotype field.

39. Click the **All** time period.

40. Click the Overview  button. You should see both leave type absences: the one you entered during the LOA Action (military training leave) and the one entered on PA30. The two leave types should total 120 hours.

Questions

Answer the following questions.

Question 1

Assume the employee receives additional orders prior to being Reinstated back to work. The additional orders indicate he is to report to active duty immediately following the military training. The employee will not use leave. What steps would you take?

-

This exercise is complete.

Exercise 2.4 – LOA – Worker’s Comp

ZPAA076

Scenario

Patricia Calloway is a permanent employee at Cultural Resources as an Archaeologist II with the following leave balances:

- 200 bonus leave
- 600 sick leave
- 80 vacation leave

Patricia was injured on the job today while performing her duties and will probably be out of work for a few months. She wants to use 40 hours of vacation during her 7-day waiting period. She is entitled to and wants to receive 2 hours per week of supplemental pay during the 6-month period.

In order for Patricia to receive the supplemental pay, either HR or Time will need to go in each week for the six months that the employee is out on WC LOA and add 2 hours supplemental time. It is important to communicate with Time to determine who will be responsible for entering the supplemental hours each week.

There are two separate LOA Actions that must be completed for this scenario:

- A. – WC 7-day Waiting Period
- B. – WC LOA w/ Supplement

Each LOA Action has three parts; however you will only be responsible for Parts I and III:


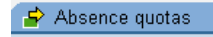
- I. Initiate Workflow (WF)
- II. Wait for the approved PCR (LOA does not go to the Funding Approver)
- III. Process Approved PCR

A.—WC 7-day Waiting Period



Part I (of A) – Initiate Workflow for WC 7-day Waiting Period as Initiator

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

1. Determine how many of hours of sick leave the employee needs to have available if she is going to be out for 6 months from the scenario above: _____

2. Enter **PT50** in the Command field on the Easy Access screen
3. Press or click **Enter**.
4. Enter the **employee's personnel number** and press or click Enter.
5. Click .
6. Click . The Quota Overview screen displays.
7. Verify the Rem. Column for vacation and also sick leave:
 - **Vacation:** _____. Does the employee have enough vacation for the 7-day waiting period? _____
 - **Sick** _____. Does the employee have enough sick to use supplemental pay for 6 months? _____
8. Type **/nZPAA076** in the Command field on the Quota Overview screen.
9. Click **Enter**. The Employee Action Request screen displays.
10. Enter the following data:

Field	Value
Personnel number	Use the Data Sheet Patricia Calloway personnel number that is assigned to your student number.
Effective on	Tomorrow's date (employees get paid for the first date injured)
Action Type	Leave of Absence
Reason	WC 7-day waiting period

11. Click **Enter** .
12. Click **Create** . The second screen of the Employee Action Request screen is displayed.
13. Enter the following data:

Field	Value
Annual Salary	Same as the current salary (hint: look in Current column)

14. Click **Enter**.
15. Click **Save**. The Information pop-up displays with the assigned PCR number.
16. Write the PCR number on the employee paperwork (in class, use the Exercise Guide).
17. Click the **green check mark** to close the pop-up box.

18. Click **Services for Object**.

NOTE: The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon.

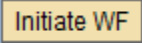
19. Select **Create > Create Note**.

20. Enter a **note title**.

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

NOTE: The notes you write are only recorded in the Workflow PCR; they do not follow to the PA Action.

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

23. Click the  button. The Information pop-up displays indicating that the PCR has been submitted.

24. Click the **green check mark** to close the Information pop-up. You are returned to the Employee Action Request (first screen).

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


Part II – Wait for Instructor or Navigator to Approve the PCR

There is one approval level:

- Agency

Your instructor and/or navigator will perform this part.

Part III (of A) – Process Approved WC 7-day Waiting Period PCR as Initiator


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

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

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

- a) Select (do not double-click) the PCR to select it.
- b) At the bottom of the screen, click the Ad hoc object “header” (not tracker) link: PA PCR xxxxx ##### (where X and # represent employee’s name and PCR number).
- c) At the Employee Action Request screen, click the **Services for Object** button to review the notes or attachments.

- d) Select **Attachment List**.
- e) Highlight the line item for the note.
- f) Double-click or use the eyeglasses.
- g) Highlight the entire note, including the title.
- h) Right-click and select **Copy**. You can either keep the copied note in the clipboard for use later, or paste it to a Word document for later use. **Do not leave the PCR open in a second session.**
- i) Click **X** to close the Display note pop-up.
- j) Click **X** to close the Services for Objects pop-up.
BEST PRACTICE: After viewing the PCR, you should return to your Inbox to process the action.
- k) Click the **Back** button.

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

30. On the Personnel Actions screen, enter:

Field	Value
From	Tomorrow's date NOTE: The From date should always be the effective date on the PCR.
Action Type	Leave of Absence (Highlight and select)

31. Click **Execute** .

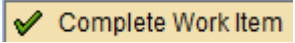
32. Complete the following fields:

Field	Value
Actions (IT0000)	
Reason for Action	Observe the field defaulted from PCR
Reference Per. No.	Leave blank.
Position	Observe the field defaulted from PCR
Emp. Group/Subgroup	Observe the field defaulted from PCR

Enter note copied from PCR	<p>From the menu bar:</p> <ul style="list-style-type: none"> • Select Edit. • Maintain text. • Press Enter if a warning message displays indicating that person and position have different group/subgroup • Use Ctrl+V (or use the Insert button) to paste the note from the PCR. • Click Save. • Click Enter and Save as needed to bypass warning messages again.
Organizational Assignment (IT0001)	<p>Enter and Save</p> <p>NOTE: If the Contract field is completed on the previous IT0001, it will copy to the new IT0001.</p>
Monitoring of Task (IT0019)	
Task Type	Workers Comp (7-day)
Date of Task	Starting with tomorrow, count calendar days to the date that signifies the end of the 7-day waiting period.
Reminder Date	When you press Enter, the reminder date field automatically populates. Change if applicable.
Comments	<p>The 7-day waiting period ends. Change the record on the 8th day to a new LOA and WC reason.</p> <p>To view a list of your tasks, you must run the <i>Date Monitoring Report</i> (transaction S_PHO_48000450) or the BI report <i>B0099 – Employee Deadline</i>.</p>
Delimit Objects on Loan (IT0040)	<p>Click Next Record icon</p> <p>In your work environment, follow your Agency’s policy regarding whether or not employees should return items while out on leave. If the employees return the items, then you would delimit the infotype.</p>

<p>Planned Working Time (IT0007)</p>	<p>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.</p> <p>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</p> <p>A 28 day employee will remain on the 28-day working week as long as they are exhausting leave. The working week should be changed to the normal agency specific working week on the 1st day they use LWOP. The work schedule rule is still changed to D01N08GN.</p> <p>NOTE: When you reinstate an employee, the IT0007 displays as part of the Reinstatement/Reemployment Action. At that time, you will assign the employee to the applicable full-time or part-time work schedule they had when they went out. You will also change the Time Mgmt Status field back to negative time if the employee was negative time prior to the LOA.</p> <p>Enter and Save.</p>
<p>Subtypes for infotypes Absences</p>	<p>Select Approved Leave</p>
<p>Absences (IT2001)</p>	
<p>Start and to dates</p>	<p>Start date: The date should default from the effective date of the LOA Action.</p> <p>To date: The date which is applicable for the number of leave hours being used. In this scenario, you need 5 Absence days to constitute the 40 hours.</p> <p>Enter and Save.</p>
<p>Subtypes for Time Quota Compensation Pop-up (IT0416)</p>	<p>Click Close.</p>

33. Click the **Back** button when you are automatically returned to the Personnel Actions screen.

34. The pop-up displays indicating that the item must be explicitly completed. Click Complete Work Item .

NOTE: It is critical that you complete this last step.

A. - WC 7-day Waiting Period is complete.

B.- WC LOA w/ Supplement – Create WC LOA w/supplement.

Scenario

Assume it is 7 days from the date Patricia Calloway was injured. According to your Date Monitoring report, the LOA for her WC first 7 days has ended. She indicates that she will be unable to work for six months. Place Patricia on LOA with the applicable reason. Either HR (best practice) or the Leave Administrator will have to enter the 2 hours sick leave every week for the supplemental pay.

There are three parts to this Exercise.

- I. Initiate Workflow (WF)
- II. Wait for the approved PCR (LOA does not go to the Funding Approver)
- III. Process Approved PCR

Part I (of B) – Initiate Workflow for WC LOA w/ Supplement as Initiator

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

35. On the Easy Access screen, type **ZPAA076** in the Command field.
36. Click **Enter**. The Employee Action Request screen displays.
37. Enter the following data:

Field	Value
Personnel number	Use the same Data Sheet Patricia Calloway that you previously used
Effective on	Eight days after the start date of the 7-day waiting period (or, one day after the end date of the 7-day waiting period)
Action Type	Leave of Absence
Reason	WC LOA with supplement

NOTE: To complete Part I, use the information you learned from previous exercises to:

- • Save the PCR and receive the PCR number
- • Write a note for the approvers
- • Initiate Workflow

Part II (of B) - Instructor or Navigator will Approve the PCR

There is one approval level:

- Agency

Wait while your Instructor or Navigator approves the PCR.

Part III (of B) – Process Approved WC LOA w/ Supplement PCR as Initiator

NOTE: For Part III (of B), use the information you learned from previous exercises to process the approved PCR:

- Access the **Inbox**.
- Highlight the PCR and copy the note.
- Execute the approved PCR.
- Enter the applicable date and Action on Personnel Actions screen.
- Process the infotypes as applicable.
 - **Actions:** Paste the note from the PCR.
 - **Monitoring of Task** – this time the date is at the end of six months and the reason is “estimated return date.”
- Explicitly complete Workflow item.

B. – WC LOA w/ Supplement is complete.

LOA Overview for 7-day waiting period (non-consecutive days)

NOTE: You will not perform an exercise. This is presented for discussion purposes only.

The WC 7-day waiting period begins with the first day missed after the day of the accident (employees are paid in full the day of the accident regardless of what time they went out). The 7 days can be consecutive or non-consecutive. When an employee is out for the

7-day waiting period, you count calendar days (which includes the weekends). If the employee is out a partial day with lost wages, you count that as one whole day. You would not count doctor’s appointments or treatments for the accident as absences because employees are paid as if they worked for reasonable time and travel to the doctor. The determining factor for counting is lost wages.

For the purposes of illustration, we will assume that an employee (Shirley James) gets hurt on Thursday, 1/10/09 at 9:00 a.m. She gets paid for that day. Shirley goes to the doctor and misses the rest of the day and does not come back on Friday. Shirley has chosen not to take leave for the 7-day waiting period. That makes 1/11/09 the first lost workday (initiate step 1 below). Shirley returns to work on Wednesday 1/16/09 (initiate step #2 - Reinstatement). When you enter the Reinstatement, the previous LOA Action is automatically delimited to 1/15. That means that the system has counted days 1/12, 1/13, 1/14, and 1/15 as lost days 2 through 5 (which includes Saturday, Sunday, Monday and Tuesday). She works through 1/21. She calls on Tuesday 1/22 to say she has a doctor's appointment. The doctor takes her off work duty indefinitely (initiate step #3). Benefits would begin on the 8th lost day which is 1/24 (initiate step #4). The system automatically calculates her last two lost days in the 7-day waiting period as 1/22 and 1/23.

NOTE: If the employee does not have enough Leave, you must record LWOP (9400).

1. LOA Action – WC 7-day waiting period, dated 1/11 until end of time
2. LOA Reinstatement/Reemployment —WC complete, dated 1/16 until end of time (which delimited #1 to 1/15)
3. LOA –WC 7-day waiting period, dated 1/22 until the end of time (which delimited #2 to 1/21)
4. LOA—either WC Leave of Absence or WC LOA w/supplement, dated 1/24 until the end of time which delimited #4 to 1/23)

BEST PRACTICE: It is important to create and process one PCR at a time. This ensures the Employee Action Request is pulling the current information. Also the default data pulls from the current approved PCR.

This exercise is complete.

Exercise 2.5 – LOA - Military

ZPAA076

Scenario

Kumar Reinaldo is a permanent employee at Cultural Resources.

He received active duty orders for 18 months. He is not eligible for differential pay. He wants to use 160 hours of a combination of vacation, bonus and holiday leave prior to starting his 30 days Reserve Active Duty.

In this scenario, a holiday is included in the time frame for which he wants to use leave. Therefore, you will enter the approved leave on the original LOA up to the date of the holiday, and then do a PA30 to enter the holiday and another PA30 to enter the remaining leave dates to total 160 hours.

NOTE: If an employee is eligible for differential pay, you must coordinate with your Agency's Payroll office to ensure that you send them the proper paperwork so that the employee is paid the differential amount while out on military leave.

Three LOA Actions must be completed for this exercise. In your work environment, you must process each LOA via ZPAA076:

- A. Reserve Active Duty (Leave)
- B. Reserve Active Duty (30 Days)
- C. Reserve Active Duty

A. Reserve Active Duty (Leave)

Part I (of A) – Initiate Reserve Active Duty (Leave)

NOTE:

- You will receive a warning message on each infotype indicating that the previous record will be delimited. Press Enter to accept the message.
 - You may receive a message that it is in a past payroll period. Press Enter to accept the message.
1. Access **PT50** to verify he has applicable military and vacation accruals.
 2. On the Easy Access screen, type **ZPAA076** in the Command field.
 3. Click **Enter**.

4. Enter the following data:

Field	Value
Personnel number	Use the employee assigned to you on the Data Sheet.
Effective on	Use one of the dates below depending upon when the class is taught.
If Class is taught...	Then use this as effective date of first LOA Action
1st Quarter (January, February, March)	January 5. The holiday is MLK. Select the applicable Monday date for the holiday.
2nd Quarter (April, May, June)	May 5 The holiday is Memorial Day. Select the applicable Monday date.
3rd Quarter (July, August, September)	July 1 The holiday is July 4. Select the applicable Monday date.
4th Quarter (October, November, December)	November 1 The holiday is Veteran's Day. Select the applicable Monday date.
Action Type	Leave of Absence
Reason	Reserve Active Duty (leave)

NOTE: To complete Part I, use the information you learned from previous exercises to:

- Create the PCR
- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow

Part II (of A) - Instructor or Navigator will Approve the PCR

There is one approval level:

- Agency

Wait while your Instructor or Navigator approves the PCR.

Part III (of A) – Process Approved Initiator

NOTE: To complete Part III, use the information you learned from previous exercises to:

- Copy the note from the PCR to paste on the Actions infotype
- Save or enter data on infotypes as applicable such as:
 - **Monitoring of Tasks:** Estimated Leave Run Out. Use the calendar icon to select the date that will indicate when the 160 hours of leave will be used. Don't forget the start date that was used for this exercise!
 - **Absences subtypes:** Select Approved Leave
 - **Absences infotype:**
 - Dates: State <date of the Action>
 - To: <enter appropriate date> (up to the holiday).
- Explicitly complete the Workflow PCR.

5. Enter the following data:

Field	Value
PA30 Absences (IT2001)	Create Subtype 9300 – Holiday. Enter dates for the Holiday. The total hours should calculate to 8 hours.
PA30 Absences (IT2001)	Create Subtype 9000 – Approved Leave. Enter the remaining dates it will take to complete the 160 hours that the employee wants to use. Write down the end date that was calculated because the day after this date is the effective date of your next LOA Action.
PA30 Monitoring of Task (IT0019)	Create Task Type: Estimated Return Date Date: Enter the date the orders indicate the employee will be finished with military duty (18 months). Enter a note that indicates the employee's order for 18 months ends.
PA30 Absences (IT2001)	To see an overview of the Absences that you have entered, make sure the subtype field is blank, click the "All" time period, and the Overview button. The list should display the two leaves and one holiday. You can ensure that you have accurately entered the leave dates to total 160 hours.

A. Reserve Active Duty (Leave) is complete.

B. Reserve Active Duty (30 days)

You must now enter the second LOA Action for Kumar Reinaldo for the 30 days which he will be paid by the State.

Part I (of B) – Initiate Reserve Active Duty (30 days) PCR as Initiator

6. On the Easy Access screen, type **ZPAA076**.
7. Click **Enter**.
8. Enter the following data:

Field	Value
Personnel no.	Use the employee assigned to you on the Data Sheet.
From	One day after the end date of the last LOA
Action Type	Leave of Absence
Reason	Reserve Active Duty (30 days).

NOTE: To complete Part I, use the information you learned from previous exercises to:

- Create the PCR
- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow

Part II (of B) - Instructor or Navigator will Approve the PCR

There is one approver level:

- Agency

Wait as your instructor and/or navigator approve the PCRs.

Part III (of B) – Process Approved PCR as Initiator

NOTE: To complete Part III, use the information you learned from previous exercises to:

- Copy the note from the PCR to paste on the Actions infotype
- Save or enter data on infotypes as applicable such as:

- **Monitoring of Tasks:** 30 days. Use the calendar icon to select the date that will indicate end of the 30 days being paid by the State.
- **Subtypes for Absences:** Select Military Active Duty (9630) (it is critical to select this subtype to ensure the employee gets paid for the 30 days)
- **Absences:**
 - Start date <same as the date of the Action>
 - To date: 30 calendar days from the date of the Action
 - Planned Working Time should have defaulted from the first LOA Action
- Explicitly complete the Workflow PCR.

B. Reserve Active Duty (30 days) is complete.

C. Reserve Active Duty

You must now enter the third LOA Action for Kumar Reinaldo for the remaining time that he will be away on leave.

Part C – Initiate and process PCR for LOA - Reserve Active Duty

To complete Part C, use the information you learned from the previous military LOAs to:

- Create new LOA
 - Start date is one day after the end date of the second LOA
 - **Action:** LOA
 - **Reason:** Reserve Active Duty
- When PCR is approved, process each infotype as applicable:
 - **Monitoring of Tasks date:** Skip or select 30 days with a comment that indicates that you are checking the status of the employee (it is a best practice to check on LOA employees every 30 days when possible)

C. Reserve Active Duty is complete.

Questions

Answer the following questions.

Question 1

True or False: If an employee is a permanent full-time (40 hours a week) employee, D01N08GN code is appropriate to use in the work schedule rule on the Planned Working Time infotype?

-

Question 2

What step must be taken to ensure that an employee who is eligible for differential pay and is going out on Military LOA receives his or her differential pay?

-

Question 3

In OSC HR/Payroll SAP, you may have to enter two or more Actions to indicate that an employee is on LOA. Why is this an advantage over the previous system process where only one Action was needed?

-

Question 4

How do you ensure that the employee will be paid the State paid 30 days military leave?

-

This exercise is complete.

Exercise 3.1 – Reinstatement/Reemployment

ZPAA076

Scenario

Patricia Calloway (the same employee from a previous exercise) has fully recovered and is released to return to work. Assume today is six months since the effective date of her initial LOA. Reinstatement Patricia from LOA. You can refer back to the date you entered on the Monitoring of Tasks as the estimated return date to use as the effective date for this Action.

Patricia will return to the same work schedule and time management type as she was prior to going on LOA which was:

- D01N08GN
- Negative time employee

NOTE: Employees return to the exact work schedule they were on prior to LOA. If the employee can only work part-time, then you must create an Appointment Change action to change their EE Subgroup and their work schedule. You will have to verify each time before you process the Reinstatement.

Part I – Initiate PCR as Initiator

To complete Part I, use the information you learned from previous exercises to:

- Access ZPAA076 and enter the applicable data to process the PCR:
 - **Date:** six months from the original LOA
 - **Action:** Reinstatement/Reemployment
 - **Reason:** Return from WC complete
- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow

Part II - Instructor or Navigator will Approve the PCR

There is one approver level:

- Agency

Wait as your instructor and/or navigator approve the PCRs.

Part III – Process Approved PCR from Initiator’s Inbox

NOTE: For Part III, use the information you learned from previous exercises to process the approved PCR:

- Execute the approved PCR
- Enter the applicable data on Personnel Actions screen
- Process each infotype as applicable
 - Return the employee to the correct Work Schedule and Time Management Status
- Explicitly complete Workflow item

Questions

Answer the following questions.

Question 1

When you reinstate an employee who has been out on LOA, what infotype should you check to make sure you restore correctly?

-

This exercise is complete.