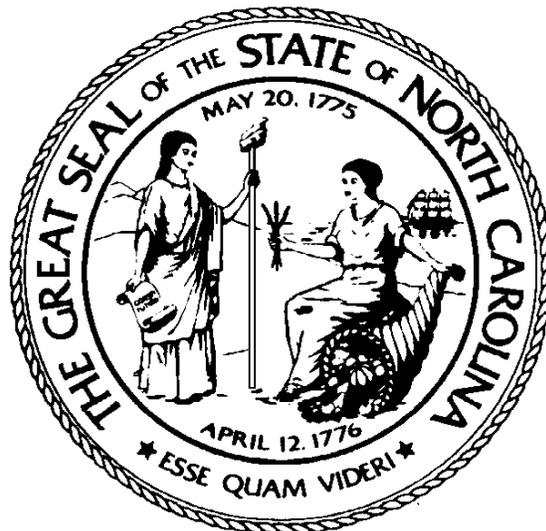


PA420

Leave of Absence

TRAINING COURSE



State of North Carolina

Office of the State Controller

May 20, 2016

For assistance with any TRAINING needs, contact:

The BEST Shared Services Team

PHONE (RALEIGH AREA): (919) 707-0707

PHONE (TOLL FREE): (866) 622-3784

EMAIL: BEST@osc.nc.gov

TABLE OF CONTENTS

Introduction	1
Overview	1
Pre-requisites	1
Post-class Offering	1
OSC Training Team Curriculum.....	2
PA Curriculum by Security Role.....	2
Strategy for Training	3
Course Map.....	3
Course Objectives	3
Reference Materials	4
Leave of Absence Overview	5
Lesson 1 Objectives	5
Actions	6
LOA in the OSC HR/Payroll System.....	7
“Field Trip” to OSC Training Team HELP page	7
Before You Begin: LOA Checklist	7
Leave of Absence Process.....	8
Additional Resources	10
Leave of Absence Workflow.....	11
ZPAA076 - Workflow	12
Inbox	13
LOA Infotypes	13
Actions (IT000).....	14
Organizational Assignment (IT0001)	15
Monitoring of Tasks (IT0019).....	16
Objects on Loan (IT0040)	16
Planned Working Time (IT0007)	17
Subtypes for Absences Pop-up	18
Absences (IT2001).....	19
Subtypes for Time Quota Compensation Pop-up	22
Time Quota Compensation (IT0416).....	22
EE HR Overview (ZEMP)	23
EE Infotype Overview (pc00_m02_linf0)	24
Creating a Leave of Absence	25
Lesson 2 Objectives	25
LOA - Worker’s Compensation	34
Terms and Definitions	34

Guidelines for Application of Dates	34
Workers' Compensation Supplemental Leave Schedule	35
Objects on Loan (IT0040)	44
Date Monitoring Report	45
Reinstating an Employee from LOA	47
Lesson 3 Objectives	47
Returning from Workers' Compensation Less Than Full Time.....	49
20 or More Hours	49
Return to Complete Status	51
Benefits and Leave of Absence	53
Lesson 4 Objectives	53
Roles and Responsibilities	53
Benefits and Leave of Absence Using Leave	54
Leave of Absence Not Using Leave	54
Reinstatement of Benefits	55
Course Review.....	57
Course Objectives	57
Next Steps.....	57
Course Assessment/Evaluation	58
Absences Worksheet.....	59
PA420 Transaction Log.....	61

Introduction

Introduction

Lesson 1: Leave of Absence Overview

Lesson 2: Creating a Leave of Absence

Lesson 3: Reinstating an Employee from LOA

Lesson 4: Benefits and Leave of Absence

Lesson 5: Course Review

Overview

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

Pre-requisites

- PA210 - Personnel Administration Terms, Concepts, and Display Data
- PA310 - Create and Maintain Employee Data
- PA313 - Modifying Position/Employee Data and Reporting

There are three prerequisites that you must take before attending this course. Attending these prerequisites ensures that you are adequately prepared with the new processes, concepts and terms needed for successful completion of the *PA420 Leave of Absence* course.

PA210 and PA313 can be taken either virtually or through an instructor-led classroom.

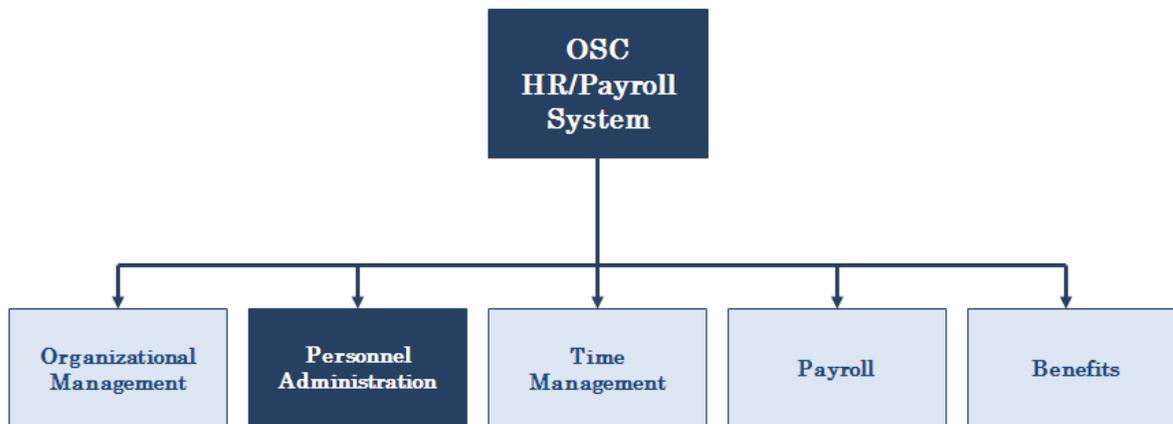
PA310 is a two-day instructor-led classroom course.

Post-class Offering

These courses may be helpful to you but are not required for the HR Master Data Maintainer Role.

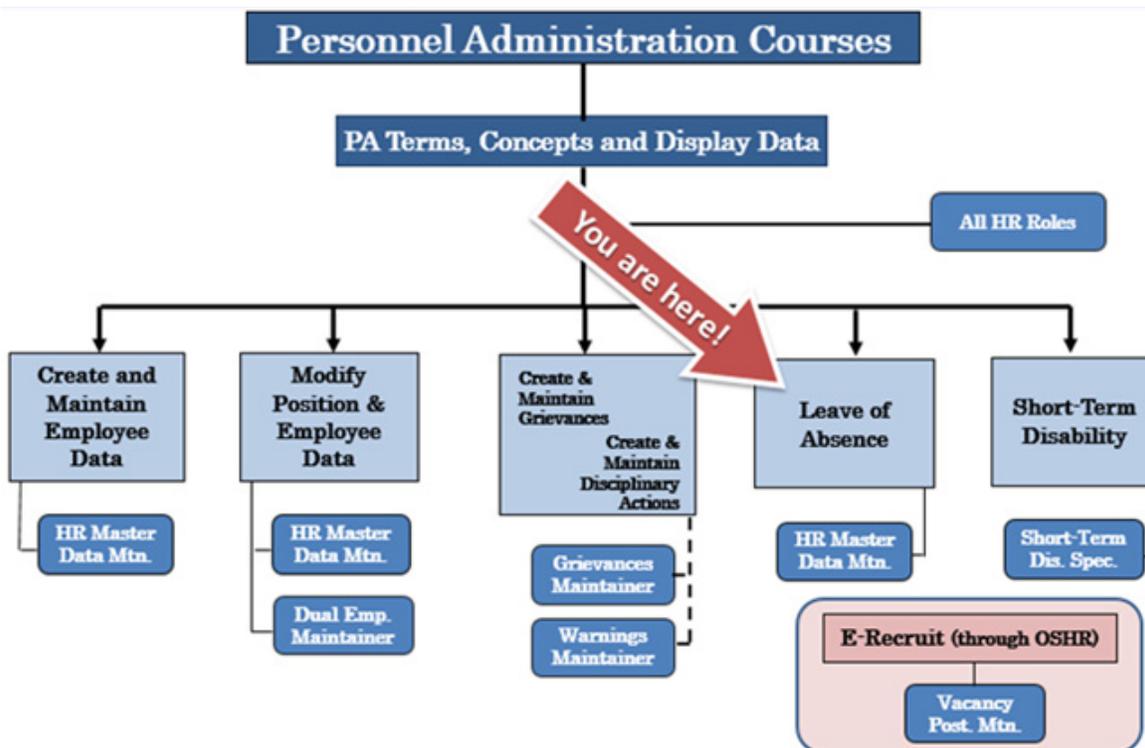
- BN200 - Benefits
- PA370 - Short-Term Disability
- BOBJ410 - Business Objects Reporting

OSC Training Team Curriculum



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

PA Curriculum by Security Role



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

Strategy for Training

Tell Me (Concepts)

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

Show Me (Demonstrations)

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

Let Me (Exercises)

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

Support Me (Availability)

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

Course Map

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

The lessons covered in this class include:

- Lesson 1: Leave of Absence Overview
- Lesson 2: Creating a Leave of Absence
- Lesson 3: Reinstating an Employee from LOA
- Lesson 4: Benefits and Leave of Absence
- Lesson 5: Course Overview

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

Course Objectives

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

- Describe the various reasons for a Leave of Absence and determine when each is applicable to use
- Execute a Leave of Absence
- Run the Date Monitoring Report
- Reinstatement an employee from Leave of Absence

Reference Materials

- Student Guide
- Job Aids
- Business Process Procedures (BPPs)
 - Work instructions
- Quick Reference Guides
 - PA Quick Reference Guide
 - HR/Payroll Basics Quick Reference Guide
- ***What's New***

Additional Resource
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

SUMMARY

This course is intended to give HR professionals an understanding of the HR/Payroll system Personnel Administration module. This course will provide you with demonstration and practice for creating, modifying and tracking Leave of Absence actions.

Leave of Absence Overview

Introduction

Lesson 1: Leave of Absence Overview

Lesson 2: Creating a Leave of Absence

Lesson 3: Reinstating an Employee from LOA

Lesson 4: Benefits and Leave of Absence

Lesson 5: Course Review

Lesson 1 Objectives

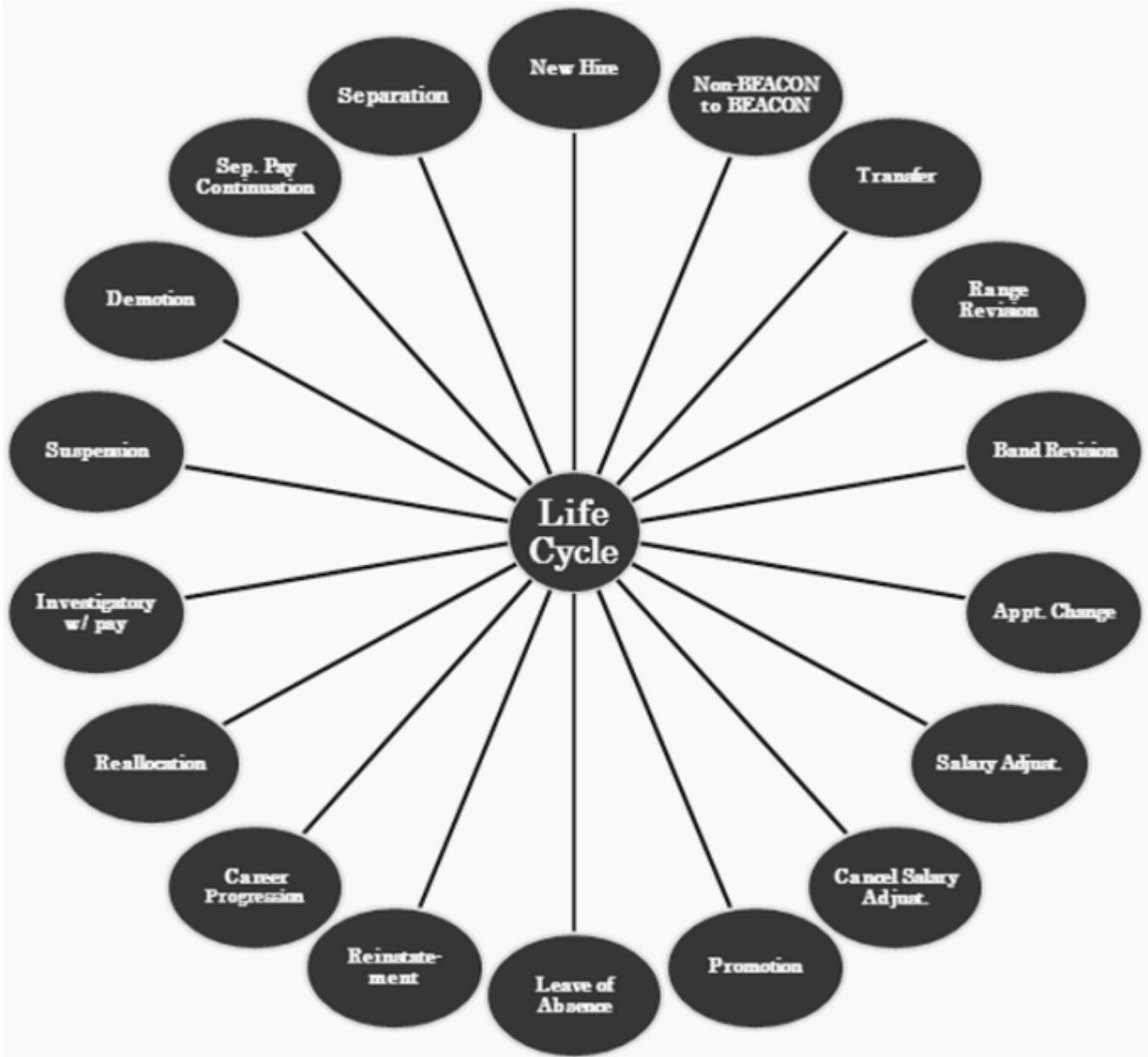
This lesson focuses on the process and infotypes that are applicable to all Leave of Absence Actions.

- Describe the checklist tasks you should perform before entering a Leave of Absence (LOA) Action
- Identify the transaction code and various infotypes associated with an LOA
- Describe the interaction of the infotypes within the LOA Action and with the Time, Benefits, and Payroll modules
- List the reasons associated with an LOA Action
- Describe the FMLA steps that are not part of the LOA Action



NOTE: LOA is the acronym for Leave of Absence.

Actions



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

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

LOA in the OSC HR/Payroll System

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

In the OSC HR/Payroll system, an employee out on leave of absence, both paid and unpaid, is still active in the system (the employee is not in withdrawn status). Time, benefits, payroll, State Service and longevity are programmed to act in specific ways depending upon the entries made on the Action/Reason and the infotypes that are part of the Action.

The OSC HR/Payroll system is designed for one person, usually Personnel (PA) Administration, to be responsible for time entry for an employee on leave of absence. However, while it is a best practice that time is entered in PA, each agency can make an agency-wide (not individual user) decision that time is entered by the Time Administrator when the employee is on LOA. Regardless of which decision the agency makes (entered by PA or Time), it should be remembered that:

- An employee should make no time entries while on LOA. The entries are to be made only by the agency (either PA or Time).
- Under no circumstances should code 9500 (time worked) be entered when an employee is on LOA. An employee should not be on LOA and also be working.

Best Business Practice

- Time (leave) is entered only by agency; employee does **NOT** enter time (leave)
- **ONE** agency person should be responsible for both Time and Personnel Administration
 - Agency can make agency-wide decision that time is entered by Time Administrator
- Only applicable leave codes or 9400 (unpaid leave) is entered; **NOT** code 9500

“Field Trip” to OSC Training Team HELP page

Follow your instructor’s directions as he/she shows you how to access the following job aids on the OSC Training Team HELP website.

- PA Actions Reasons Definitions job aid
- LOA Checklists

Before You Begin: LOA Checklist

- PA20
 - IT0000 – Actions
 - ❖ View employee’s last Action
 - ❖ Verify eligible for requested leave
- CATS_DA to see if time prior to LOA has been entered, released and approved.
- If employee is using leave for LOA, access PT50 to ensure that employee has enough in quota balance.
- Communicate with the Benefits Representative

Before processing any type of Leave of Absence (LOA) use the above checklist.

- **Actions**

View Actions to verify that the employee has a hire date and is in a status that qualifies him or her for LOA.

- **CATS_DA**

All time prior to LOA must be entered, released and approved before an employee goes out on LOA. After the LOA Action has been entered, the employee should not be entering and releasing time. It is especially important for time to be entered, released and approved if the employee plans to use any leave accruals while out on LOA.

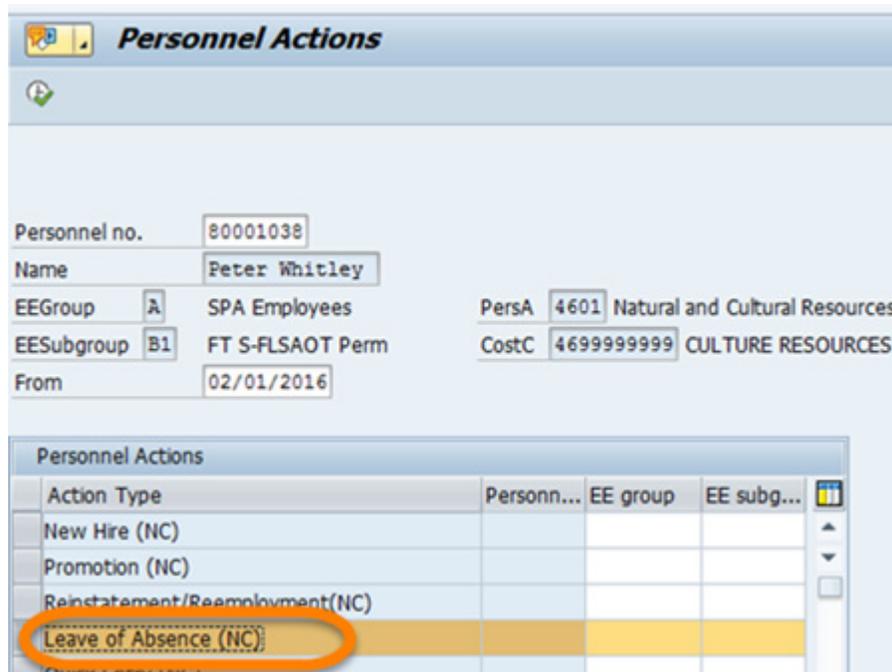
- **PT50**

If the employee has indicated a certain type of leave usage while on LOA, use this transaction to verify that enough of that quota type is available to use.

- **Benefits**

The Benefits Representative will have to take certain steps to communicate with the employee who is going out on leave, especially unpaid leave. Be sure to inform the Benefits Representative when an employee is out on LOA (more about Benefits in a subsequent lesson).

Leave of Absence Process



A **Leave of Absence** occurs when an employee is out of work on paid or unpaid leave. You will observe there is only one LOA Action with no indication about whether it is paid or unpaid (LOA replaces LWOP).

Reasons associated with the Leave of Absence Action	
<ul style="list-style-type: none"> • FMLA • Parental (not FMLA) • Family Illness Leave • Extended Illness • Reserve Active Duty (leave) • Reserve Active Duty (lump sum) • Reserve Active Duty (30 days) • Reserve Active Duty • WC 7 day waiting period • WC Leave of Absence w/supplement • WC Leave of Absence • WC Salary Continuation Pay • WC Continuation Pay for Teachers Only • Education 	<ul style="list-style-type: none"> • <i>Short-Term Disability 60 day waiting period</i> • <i>Short-Term Disability (Leave)</i> • <i>Short-Term Disability (lump sum)</i> • <i>Short-Term Disability Regular</i> • <i>Short-Term Disability Extended</i> • Other • Emergency Layoff • Extended Military • Military Care Giver • Military Training • Civil Air Patrol • State Defense Militia Duty • Long-Term Disability (Leave)

IMPORTANT: Per OSHR, ALL Agencies are to create an LOA action for employees out half the workdays in a month. The exception is when an employee is on vacation. They must be exhausting leave.

Although the reasons are shown in the OSC HR/Payroll system in a list, you can mentally group them into four categories as illustrated above.

The Short-term Disability reasons are not discussed in this course. It is covered in a separate course entitled *PA370 Short-Term Disability*.

Time/Leave Administration and FMLA

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. Time/Leave Administration is responsible for the **tracking** of FMLA eligibility and number of hours that the employee has used related to FMLA.

When the FMLA event is entered into the FMLA Workbench by Time/Leave, the Workbench automatically checks an employee's eligibility for FMLA. Based on OSHR policy, an employee's eligibility is related to his or her length of total State Service and hours worked during the previous 12 months.

After an employee has exhausted all of his or her leave entitlement, the FMLA Workbench will also manage the employee's eligibility for subsequent leave entitlements.

Intermittent FMLA

If an employee is absent intermittently on FMLA, you do not execute a LOA Action. In that case, the Time Administrator enters the FMLA event using PTFMLA. The Leave Administrator tracks absences associated with the FMLA event.

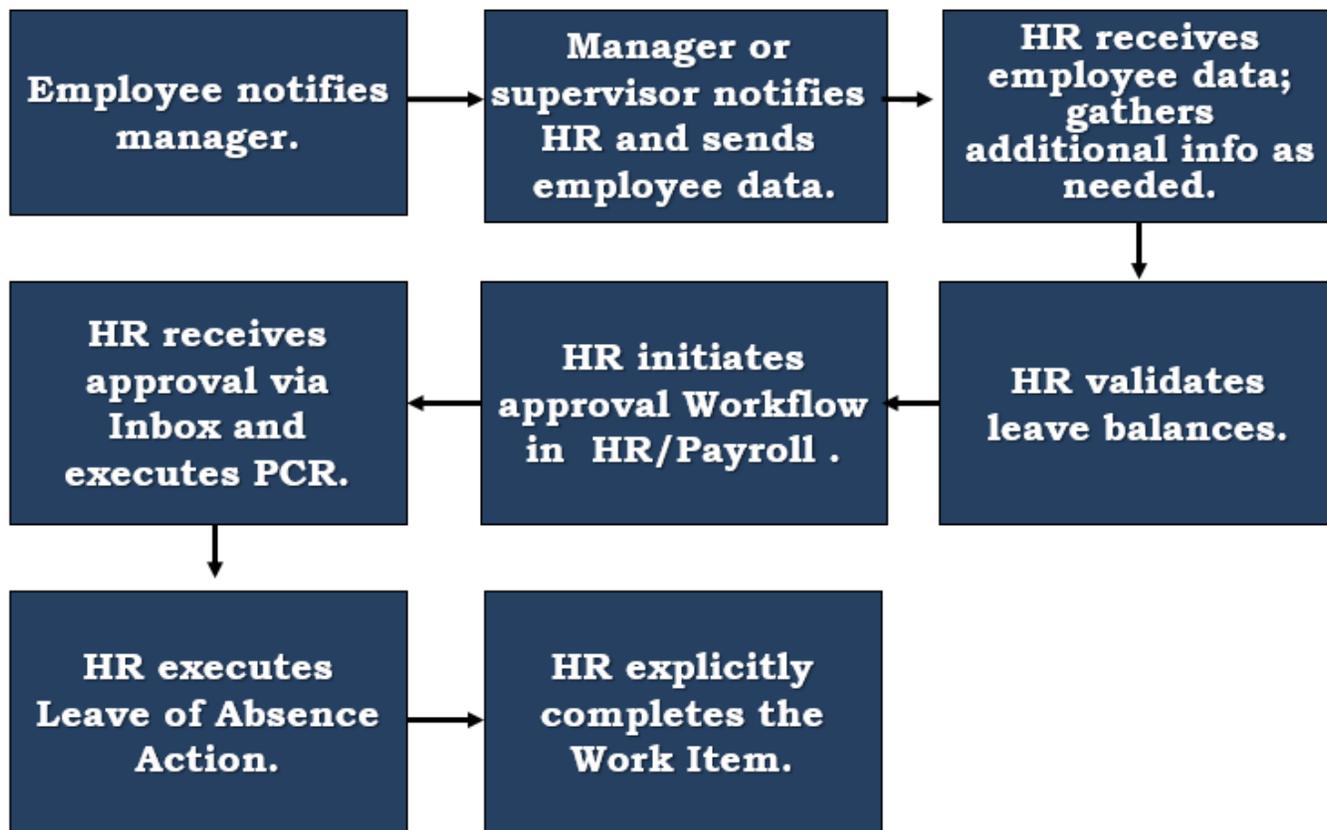
Additional Resources

The screenshot shows a 'Training' page with a 'Table of Contents: By Functional Area'. A red box highlights 'Job Aids' under 'Personnel Administration', with an arrow pointing to a list of links on the right. The link 'PA Actions Reasons Definitions' is also highlighted with a red box.

It is very important to choose the correct reason associated with each LOA. The *PA Actions-Reasons Definitions* job aid, located on The OSC Training HELP website, contains a detailed explanation of each reason for LOA.

Additional Resource
<p style="text-align: center;">http://www.osc.nc.gov/training/osctd/help/index.html</p> <p>Use the following path to locate the job aid:</p> <p style="text-align: center;"><i>Personnel Administration > Job Aids</i></p> <ul style="list-style-type: none"> • PA Actions Reasons Definitions

Leave of Absence Workflow



LOA is used to track various activities regarding an employee's leave of absence. As a result, you may need to make more than one entry for the Action (along with the associated reason) when an employee is on LOA (refer to the LOA BPP online at the OSC Training HELP website). In the OSC HR/Payroll system you will now have a complete history of the activity for a particular LOA (because of the various entries) whereas in the previous system, there was only one entry. Comments can be entered during the Action on many of the infotypes (for example IT0000, IT0019, IT2001). Also, you can run reports based on reasons. Take, for example, an OSC HR/Payroll system employee who is going on FMLA leave. The employee has enough leave for one month but will be out for up to three months, meaning they will be on leave without pay for up to two months. In OSC HR/Payroll, Your agency will need to enter all time for the employee while they are out.

 Reminder...FMLA is only 12 weeks!

Remember that adjustments may be needed to account for any leave earned/taken (including holiday leave) if the employee is in an active pay status.

ZPAA076 - Workflow

All Leave of Absence actions must be initiated using transaction code ZPAA076.

As indicated in *PA310 Create and Maintain Employee Data*, transaction code **ZPAA076** is the OSC HR/Payroll system electronic approval process, referred to as Workflow (WF).

NOTE: Make sure there is no work time recorded on the proposed effective date of the Action. If work time has been recorded on the proposed effective date, make the next day the effective date of the Action.

On the initial *Employee Action Request* screen enter the applicable data. After the Action type and Reason is entered, the second *Employee Action Request* screen is displayed. This screen has two columns. The left column displays the current status of the employee. On the right, enter the salary information.

When you initiate Workflow, you will receive a Personnel Change Request (PCR) number. Be sure to make a record of the PCR number so that you can track it.

After all the data is entered and WF is initiated, the OSC HR/Payroll system sends the request to the appropriate Approver who can approve or reject the request (there may be more than one level of approval).

Inbox



The second part of the Workflow is to see if your Workflow item has been approved or rejected. Go into the SAP Business Workplace from the Easy Access screen.

From the Business Workplace screen, click Inbox > Workflow. All the approved or rejected PCRs that you have initiated are listed on the right. Double-click the approved PCR and the applicable screen automatically displays for the Action. You are now ready to execute the appropriate Action.

Workflow is always the first step before you initiate an Action. You do not use Workflow for PA30 transactions. If you are ever in doubt whether Workflow is needed, access the Personnel Actions screen using PA40. If the Action is on the list, it must be processed through Workflow. If you attempt to bypass Workflow for an Action, you will receive an error message and not be allowed to continue.

LOA Infotypes

- Personnel Actions IT0000
- Create Organizational Assignment IT0001
- Create Monitoring of Tasks IT0019
- Delimit Objects on Loan IT0040
- Planned Working Time IT0007
- Absences IT2001
- Time Quota Compensation IT0416

When you create an Action (such as LOA) OSC HR/Payroll presents the applicable infotypes. The LOA infotypes are listed above and discussed on subsequent pages. You may or may not need to enter data in all of them, depending upon the circumstances of the leave you are processing.

As indicated in previous courses, you should always save a pre-populated infotype that is part of an Action, even if you do not enter or change the data.

Actions (IT000)

Display Actions (0000)





Pers.No.
 Name
 EEGroup SPA Employees PersA Natural and Cultural Resources
 EESubgroup FT N-FLSAOT Perm
 Start to Chng

Personnel action

Action Type
 Reason for Action New Hire

Status

Customer-specific
 Employment
 Special payment

Organizational assignment

Position Historic Sites Specialist
 Personnel area Natural and Cultural Resources
 Employee group SPA Employees
 Employee subgroup FT N-FLSAOT Perm

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action
01/01/2008	Z0	New Hire (NC)	01	New Hire

The **Actions IT0000** infotype indicates the events that occurred on the employee’s personnel record. The infotype shows the employment status. Time, Payroll and Benefits use information from IT0000.

The information on this infotype should pre-populate based on the data you entered when initiating Workflow ZPAA076. **Enter** and **Save** the infotype.

Organizational Assignment (IT0001)

Display Organizational Assignment (0001)

Org Structure

Personnel No	<input type="text" value="30000326"/>	Name	<input type="text" value="Kumar Reinaldo01"/>	
EEGroup	<input type="text" value="A"/> SPA Employees	PersA	<input type="text" value="4601"/> Natural and Cultural Resources	
EESubgroup	<input type="text" value="A1"/> FT N-FLSAOT Perm	Statu	<input type="text" value="Active"/>	
Start	<input type="text" value="01/01/2008"/>	to	<input type="text" value="12/31/9999"/>	Chng <input type="text" value="06/09/2008"/> <input type="text" value="ECATT"/>

Enterprise structure

CoCode	<input type="text" value="NC01"/> STATE OF NC
Pers.area	<input type="text" value="4601"/> Natural and Cultural Resour... Subarea <input type="text" value="NC01"/> 7day Norm
Cost Ctr	<input type="text" value="4699999999"/> CULTURE RESOUR... Bus. Area <input type="text" value="4600"/> DNCR
Fund	<input type="text" value="4699999999"/> CULTURE- SUSPEN...
Func. Area	<input type="text" value="G0000000000000001"/> General Government

Personnel structure

EE group	<input type="text" value="A"/> SPA Employees	Payr.area	<input type="text" value="01"/> NC Monthly
EE subgroup	<input type="text" value="A1"/> FT N-FLSAOT Perm	Contract	<input type="text"/>

Organizational plan

Percentage	<input type="text" value="100.00"/>
Position	<input type="text" value="65001574"/> 800904000514 Historic Sites Specials...
Job key	<input type="text" value="30001542"/> His St S Spl Historic Sites Specials...
Org. Unit	<input type="text" value="20010138"/> 48020102049 CR CDS Eastern Regio...
Org.key	<input type="text" value="460146999999999"/>

Enter and **Save** the infotype.

Time, Payroll and Benefits pull information from **Organizational Assignment** IT0001. All of the fields on this infotype default from the position assigned to the employee.

The Contract field is only used for LOA for Short-Term Disability (discussed in *PA370 Short Term Disability*). For example, if the leave is for Short-Term Disability, it is necessary to use the Contract field to indicate that the employee has fewer than five years of service for retirement. This determines if the health insurance will be paid partially by the State or solely by the employee. For STD LOA, if the employee has five or more years of service for retirement, leave the field blank.

Monitoring of Tasks (IT0019)

Create Monitoring of Tasks (0019)

Personnel No	80000326	Name	Kumar Reinaldo01
EEGroup	A SPA Employees	PersA	4601 Natural and Cultural Resources
EESubgroup	A1 FT N-FLSAOT Perm	Statu	Active

Task

Task Type ▼

Date of Task Processing indicator New task ▼

Reminder

Reminder Date

Lead/follow-up time For specific task type ▼

Comments

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

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

Objects on Loan (IT0040)

List Objects on Loan (0040)

Personnel No	80000326	Name	Kumar Reinaldo01
EEGroup	A SPA Employees	PersA	4601 Natural and Cultural Resources
EESubgroup	A1 FT N-FLSAOT Perm	Statu	Active

Choose To STy.

Overview

Start Date	End Date	Object on l...	Name	No.	Loan object number
01/01/2008	12/31/9999	01	State ID		15551451

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

Planned Working Time (IT0007)

Create Planned Working Time (0007)

Work schedule

Personnel No: 80000326 Name: Kumar Reinaldo01

EEGroup: A SPA Employees PersA: 4601 Natural and Cultural Resources

EESubgroup: A1 FT N-FLSAOT Perm Statu: Active

Start: 5/1/2016 To: 12/31/9999

Work schedule rule

Work schedule rule	D01N08GN	MTWHF-8,SaS-O	WSR
Time Mgmt status	1 - Positive Time Recording		
Working week	Wk - Sun (mdnt) - Sat		
<input type="checkbox"/> 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	

Full Time:
Place on D01N08GN or applicable 5x8 schedule

Part-Time:
Place on appropriate part-time schedule.

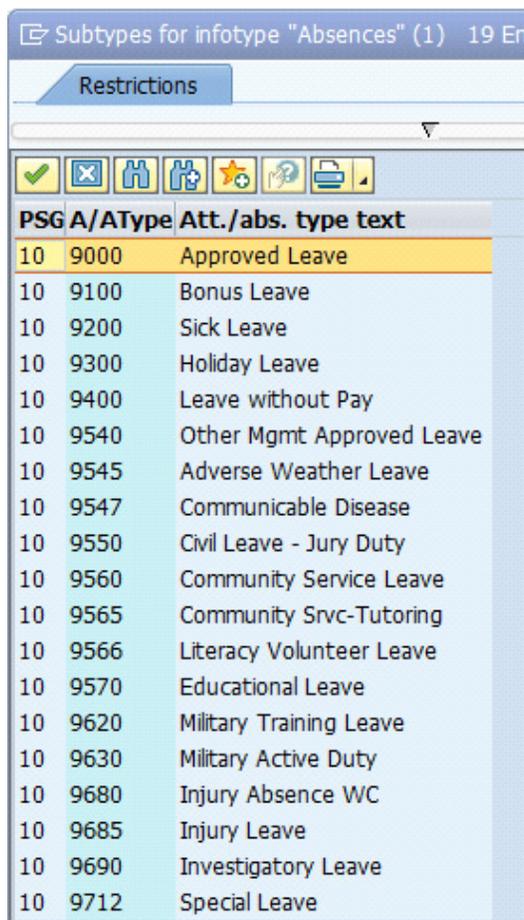
Both FT and PT must be Positive Time Recording.

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. Part-time employees can be kept on their applicable part-time schedule.

All employees, whether full-time or part-time, **must** be positive time recording.

NOTE: When you reinstate an employee, the IT0007 infotype displays as part of the Reinstatement/Reemployment Action as well. You will at that time assign the employee to the applicable full-time or part-time work schedule, and also change the Time Mgmt Status field back to negative time if the employee was negative time prior to LOA.

Subtypes for Absences Pop-up



Subtypes

Use 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.
- **Important!**- If the employee is on unpaid leave and the employee’s longevity or leave balances are to be stopped, select code 9400 (not applicable for Military and Workers Comp leave).
- If the employee is not using leave and code 9400 is not applicable, click the X to close.

Codes

It is important to select the code that corresponds to the Reason selected for the LOA Action. For example:

- **9620** – used when placing the employee on LOA Action with a Reason of Extended Military
- **9630** –used when placing the employee on LOA Action with a Reason of Reserve Active Duty (30 days)
- **9680** – used when employee has returned to work from WC but needs to see doctor or go to rehab related to injury on job
- **9685** – used when placing the employee on LOA Action with a Reason of Injury Leave

Absences (IT2001)

Create Absences (2001)

Personal work schedule | Active

Personnel No: 80001036 Name: Dean Leach
EE group: SPA Employees Personnel ID: 4601 Natural and Cultural Resources
WS rule: D01N08GN MTWHF-8,SaS-0 Status: Active
Start: 12/12/2015 To: 01/06/2016

Absence

Absence type: 9200 Sick Leave
Time: -
Absence hours: 144.00
Absence days: 18.00
Calendar days: 26.00
Quota used: 144.00 Hours

Advance payment

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

The Absences infotype only displays if you selected a leave type from the subtype for Absences pop-up (see previous page).

The Absences infotype (IT2001) indicates the number of hours the employee wants to use for leave and deducts from the leave quotas as applicable. If the employee is not supposed to accrue leave or longevity while on unpaid leave, IT2001 with code 9400 should be entered (see State policy regarding accrual and longevity exceptions for Workers' Comp, law enforcement and military leave). The hours that default are based on IT0007-Planning Working Time and 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.

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 IT2001, they are processed during the next time evaluation. **Do not enter Time via CATs.**

NOTE: If absences are recorded on IT2001, the absences will not be pulled when running the CATC - Time Leveling Report.

ABSENCES (IT2001) EXAMPLE WITH HOLIDAYS

#1
Enter leave dates up to the holiday on the original LOA

#2
On a PA30, enter first holiday dates

#3
On a PA30, enter leave dates up to the next holiday

If the employee is using leave during a time that includes a holiday, additional IT2001 infotypes will be necessary to allow the employee to take holiday leave. The additional IT2001 records are created in transaction PA30. For example, assume an employee is going out on FMLA on December 1st and wants to exhaust 184 hours vacation prior to beginning FMLA. In this scenario, there are two holiday periods (12/23 – 12/25 and 1/1). Your entries would be as follows:

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

Start: 12/01/2015 To: 12/22/2015 (128 hours **Annual Leave**)

By entering the dates above, the system calculates that 16 working days fall within the date range. The D01N08GN work schedule on IT0007 that was created issues a 5 X 8 work schedule for the employee; therefore, 128 hours default into the Absence hours field.

2. Create a PA30 to enter the first holiday period, IT2001, subtype 9300:

Start: 12/23/2015 To: 12/25/2015 (24 hours **Holiday Leave**)

3. Create a PA30 to enter the next leave period **up to** the next holiday, IT2001, subtype 9000:

Start: 12/26/2015 To: 12/31/2015 (32 hours **Annual Leave**)

NOTE: While an employee is out on LOA, the Leave Administrator must manually manage holidays. The system will not generate holidays during the LOA. *Remember*, normal holiday accruals occur 30 days prior to the actual holiday.

4. Create a PA30 to enter the next holiday period, IT2001, subtype 9300:
 Start: 1/1/2016 To: 1/1/2016 (8 hours **Holiday Leave**)
5. Create a PA30 to enter the remaining leave, in this case 32 hours, IT2001, subtype 900:
 Start: 1/02/2016 To: 1/6/2016 (24 hours **Annual Leave**)

By entering the data on the Absences infotype as explained in this manner, it is not necessary for a separate time sheet to be entered for the employee. If data is not entered on this infotype (nor a timesheet), the employee is on leave without pay.

Using leave accrued while out on leave (if eligible)

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 PA30 IT2001 in order to enter the new leave time. For example: An employee has 184 hours of approved leave. When the employee goes out on LOA, he/she wants to use the 184, plus the hours that are accruing while on leave. In this case, you would enter the 1684 hours on IT2001 during the Action. After the employee has accrued the additional hours, you would create a PA30 for another IT2001 to exhaust the additional leave.

Subtypes for Time Quota Compensation Pop-up

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
1	10	Z008	Callback Comp Payout
1	10	Z009	Special Leave Payout

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.

Time Quota Compensation (IT0416)

Create Time Quota Compensation (0416)

Personnel No: 80000430 Name: Tomeka Avans01
 EE group: SPA Employees Personnel ar: 4601 Natural and Cultural Resources
 WS rule: N01N08GH MTWHF-8, SaS-O Status: Active
 Start: 12/15/2015
 Comp. method: Z001 Vacation Payout

Compensation specifications
 Time quota type: 10 Vacation Leave
 Compensation rule: 000
 No. to compensate: []

ATy	Quota text	Entitl	Unit	Comp.	Rem.	Amount	Curr...	Deduction...	Deduction...
10	Vacation Leave	473.30000	Hours	0.00000	353.30000	0.00	<input type="checkbox"/>	01/16/2008	12/31/9999
15	Sick Leave	1,124.95000	Hours	0.00000	1,004.95000	0.00	<input type="checkbox"/>	01/16/2008	12/31/9999
40	Holiday Leave	8.00000	Hours	0.00000	8.00000	0.00	<input type="checkbox"/>	01/01/2008	03/02/2008
40	Holiday Leave	8.00000	Hours	0.00000	8.00000	0.00	<input type="checkbox"/>	02/20/2008	04/21/2008
40	Holiday Leave	24.00000	Hours	0.00000	24.00000	0.00	<input type="checkbox"/>	08/06/2011	12/31/9999
55	Special Leave	40.00000	Hours	0.00000	40.00000	0.00	<input type="checkbox"/>	07/01/2013	06/30/2014
65	Community Service Lea...	24.00000	Hours	0.00000	24.00000	0.00	<input type="checkbox"/>	01/01/2008	12/31/2008

Enter the hours to be paid out.
NOTE: The hours entered cannot exceed the hours for the applicable leave type shown in Rem. Column.

This infotype only displays if you selected a leave category from the subtypes pop-up (see previous page). If you did make a selection on the subtypes pop-up, that leave type pre-populates on the Time Quota Compensation infotype.

The date defaults from the Action. **Do not** change the date on this infotype (like you do in a Separation or Separation Pay Continuation).

The number of hours that the employee is entitled to for that leave type category defaults in the Rem. Column. That is why it is critical to ensure that all time has been entered, approved, released and that time evaluation has run before entering the LOA Action.

Multiple Leave Types

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.

EE HR Overview (ZEMP)

EE HR Overview	
As Of: 01/15/2014 Run Date: 01/15/2014	
Employee Data	Position Data
PERNR: 01823330	Position: 60013353 - Insurance Co Examiner I
EE Name: Lilly Ann Small	Job: 30000543 - Insurance Co Examiner I
Employment St: Active	Supervisor: 00090000 - Insurance Co Examiner I
Personnel Area: Insurance	Org Unit: 20001494 - INSURANCE Financial Evaluation & Anlys
EE Group: SPA Employees	EE Group: SPA Employees
EE Subgroup: FT N-FLSAOT Perm	EE Subgroup: FT N-FLSAOT Perm
Personnel Subarea: 7day Norm	Personnel Subarea: 7day Norm
Ann Sal/Hr Rate: \$57,643.00	Budgeted Salary: \$57,643.00
EE Exempt Status: Exempt Managerial	Statutory Exemption Type: Exempt Managerial
PS Group: 6R76 Level: 6R	
Cap. util. lvl: 100.00 WkHrs/Pd: 173.33 Monthly	Organizational Data
DOB: 02/13/1980 Gender: F	Agency: 70000002 - Department of TrarInsurance
Ethnic Origin: Asian (Non-Hispanic/Latino)	Division: 72020002 - CFO-Financial Management Division
Disability: None/Prefer not to report	Section: 74020014 - Purchasing
Military Status: N/A	Branch: 78020036 - Purchasing
Veteran Status: Non Veteran	
State EOD: 09/01/2009 Agency EOD: 08/01/2013	Time Data
Length of Service: 232 Mths	Time Management St: 1 - Positive Time Recording
Est Long Due Date: 08/2014	Working Week: 07 - Wk - Sun (ndnt) - Sat
	Work Schedule Rule: D01N08GN - MTWHF-8,SaS-0
Latest EE Action & Salary Changes:	Weekly Working Hours: 40.00
Most Recent Actn: Transfer (NC)	OT Comp: N NS Premium: N
Reason: Agency to Agency - Promotion	Callback: N WE Premium: N
Action Date: 08/01/2013	Gap Hrs Comp: N ES Premium: N
Amt Last Sal Chg: \$13,065.00	Holiday Payout: Y 365 Holiday Premium: Y 50%
Salary Chg Date: 08/01/2013	On-Call: N
	Extended Duty: N
Disclaimer: Not for Public Information	

The Employee Overview screen is a “snapshot” of an employee’s information.

The transaction is initiated by entering data to define who and what time frame an HR user needs to view a particular employee’s information.

1. Enter **ZEMP** in the Command field on the Easy Access screen and press the Enter key or click the green check ball.
2. Enter an Employee ID.
3. The current date defaults into the Selection Date field. You have the option to enter any date that the employee has data in the system. If you enter a date that is not valid, you receive the message ‘No Information for the date Entered’. If you are not authorized, you will receive a message indicating that you do not have authorization.
4. Click the Execute button to perform the transaction.

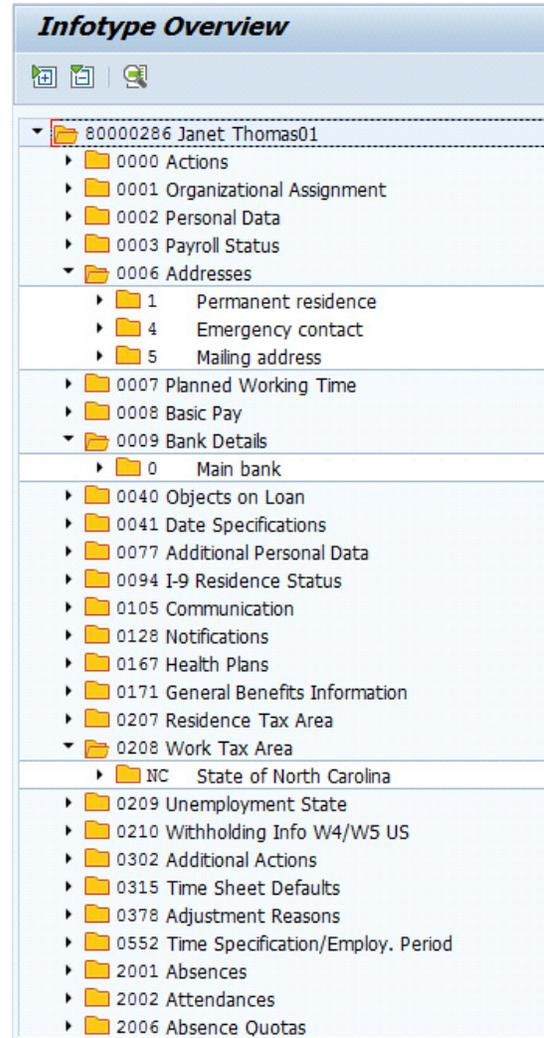
EE Infotype Overview (pc00_m02_linf0)

The EE Infotype Overview is a transaction screen that lists all active infotypes for an employee during a specified period of time.

1. Enter the transaction code **PC00_M02_LINF0** in the Command field.
2. Press or click **Enter**.
3. Make the necessary selections (personnel number and validity dates).
4. Click **Execute**.

You can expand or collapse any and all of the infotypes.

To see the detail of a specific infotype (e.g. IT0001), double-click the infotype or select it and click at the top of the screen. The system will display the detail screen (same as *PA20 – Display Master Data*). You may click the green back arrow to return to the EE Infotype Overview screen.



SUMMARY

In this lesson you learned to:

- Describe the checklist tasks you should perform before entering a Leave of Absence (LOA) Action
- Identify the transaction code and various infotypes associated with an LOA
- Describe the interaction of the infotypes within the LOA Action and with the Time, Benefits, and Payroll modules
- List the reasons associated with an LOA Action
- Describe the FMLA steps that are not part of the LOA Action

Creating a Leave of Absence

Introduction

Lesson 1: Leave of Absence Overview

Lesson 2: Creating a Leave of Absence

Lesson 3: Reinstating an Employee from LOA

Lesson 4: Benefits and Leave of Absence

Lesson 5: Course Review

Lesson 2 Objectives

This lesson focuses on the creation of various Leave of Absence Actions.

- Determine the appropriate reason for a LOA (Leave of Absence) Action
- Enter the data to initiate and complete a Leave of Absence for various reasons
- Run the Date Monitoring Report

		more than 60 days under G.S. 115C 325(f)(2).
Z5	LOA – used when an employee is out of work on paid or unpaid leave.	<p>POLICY LINK: http://www.oshr.nc.gov/Guide/Policies/policies.htm (Sections 5 & 6)</p> <ul style="list-style-type: none"> • 01 FMLA – employee is out for a reason that qualifies for FMLA. • 06 Parental (not FMLA) employee is not eligible for FMLA. • 07 Family Illness Leave – employee is out due to having to take care of immediate family member. If the employee chooses to not use FMLA • 08 Extended Illness – employee illness that is not covered by FMLA or short term disability. • 10 Reserve Active Duty (leave) – employee is exhausting vacation, bonus or comp time prior to 1 day leave. • 11 Reserve Active Duty (lump sum) - employee is paid for vacation, bonus or comp time prior to 1 day leave. • 09 Reserve Active Duty (30 days) – employee is placed on RAD 30 days with Active Duty orders (30 days) • 25 Reserve Active Duty – employee is placed on RAD 30 days with Active Duty orders (30 days)

EXERCISE 2.1: LOA - FMLA

SCENARIO

Janet Thomas is a permanent employee who works at the Department of Commerce. 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.

She has the following leave balances:

- ❖ 240 sick
- ❖ 240 vacation

There are three parts to this Exercise but 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
- IV. Add Absences via PA30

Part I - Initiate Workflow as the 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. Follow along with your instructor as he/she logs into the Training Client. (Use the ID given to you by your instructor.)
2. Once you have logged in, add the following transactions to your SAP Favorites folder. Your instructor will demonstrate if you need assistance.
 - ZPAA076
 - PA20
 - PA30
 - S_PH0_48000450
 - PTFMLA
 - PT50
 - PC00_M02_LINF0
3. Follow your instructor’s directions to add the OSC Training Favorites web page as a URL in your SAP Favorites folder.

4. On the Easy Access screen, type **ZPAA076** in the Command field or click the transaction in Favorites folder.
5. Click **Enter** . The Employee Action Request screen is displayed.
6. From the table below, select the **Personnel number** assigned to you by your instructor and enter it into the Personnel number field.

PERSONNEL #: <i>Janet Thomas</i>							
A	80000286	F	80000291	K	80000296	P	80000301
B	80000287	G	80000292	L	80000297	Q	80000302
C	80000288	H	80000293	M	80000298	R	80000303
D	80000289	I	80000294	N	80000299	Inst 1	80000304
E	80000290	J	80000295	O	80000300	Inst 2	80000305

Write the Personnel number on your Transaction Log.

7. Enter the following data:

Field	Value
Effective on	Today's date (Write on your Transaction Lot)
Action Type	Leave of Absence
Reason	FMLA

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

Field	Value
Annual Salary	Same as her current salary (HINT: Look in Current column)

11. Click **Enter** .
12. Click **Save** . The Information pop-up is displayed with the assigned PCR number.
13. Write the PCR number on your Transaction Log.
14. Click  to close the pop-up.
15. 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.

16. Select **Create > Create Note**.
17. Enter a **note title**.
18. 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.

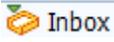
 **NOTE:** The notes that you write are only recorded in the Workflow PCR; they do not follow in the PA Action. However, you can copy and paste from PCR into the Action when you are processing the infotypes.
19. Click the **green check**  to close the notes. If applicable, close the notes icon menu.
20. Click **Initiate WF** . The Information pop-up is displayed indicating that the PCR has been submitted.
21. Click the **green check**  to close the Information pop-up. You are returned to the Employee Action Request (first screen).
22. Click the **BACK** button to return to the Easy Access screen.

Part II - Agency Approval Process

Your instructor and/or navigator will perform this part.

Part III - Complete Approved PCR from 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.

23. From the Easy Access screen, click the **SAP Business Workplace**  button.
24. Click the node beside **Inbox**  to expand it.
25. 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.

 **CRITICAL:** 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.

26. 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).

27. 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)

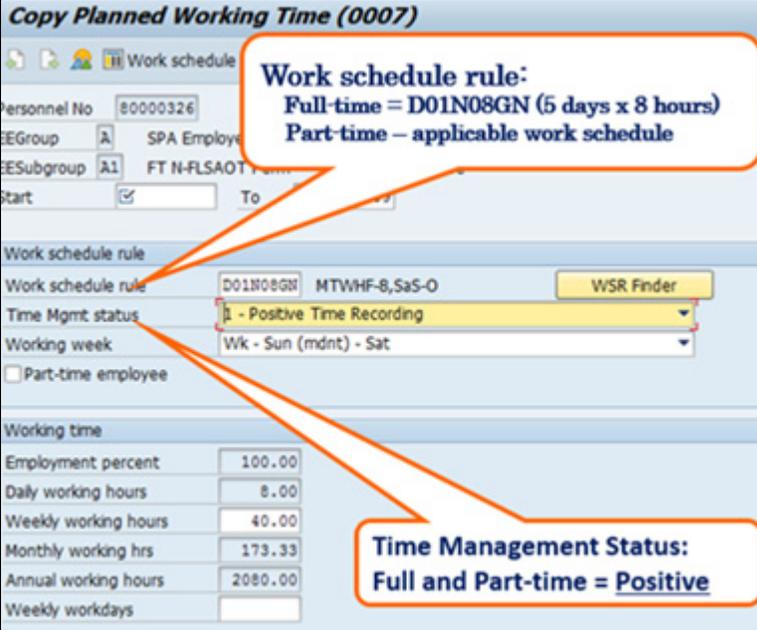
28. Click **Execute** .

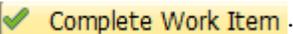
29. Complete the following fields:

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.

<p>Enter note copied from PCR</p>	<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.
<p>Organizational Assignment (IT0001)</p>	<p>Click Enter and Save.</p> <p> NOTE: If the Contract field is completed on the previous IT0001, it will copy to the new IT0001.</p>
<p>Monitoring of Tasks (IT0019)</p>	
<p>Task Type</p>	<p>Estimated Return Date (12 weeks)</p>
<p>Date of Task</p>	<p>Use the calendar icon to select the date when the 12 weeks will end.</p>
<p>Reminder Date</p>	<p>Enter Reminder date using either method:</p> <ul style="list-style-type: none"> • Enter a calendar date in the Reminder date field. • Enter a time period in the Lead/Follow-up field and press Enter.
<p>Comments</p>	<p> NOTE: Since the comments do not wrap at the end of the line, use the Edit > Maintain Text function located on the menu bar to add the comments below to the infotype. Remember to start any comments with your name and the date. In your work environment, write whatever notes are required by your Agency. In class, we are only entering short notes for expediency. Enter the following:</p> <p style="text-align: center;"><i><your name, date></i></p> <p style="text-align: center;"><i>The employee is expected to return to work at the end of 12 weeks.</i></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> <ul style="list-style-type: none"> • To view a list of your tasks, you must run the SAP report Date Monitoring Report (transaction S_PHO_48000450) or the BOBJ report B0099- Employee Deadline.

Delimit Objects on Loan (IT0040)	<ul style="list-style-type: none">• Highlight the line for State ID.• Click the Delimit button.• The infotype is delimited as of today. <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>
---	--

<p>Planned Working Time (IT0007)</p>	<p>Make the following selections:</p> <ul style="list-style-type: none"> • Verify that D01N08GN has defaulted in the Work schedule rule field. Change it if it did not default. • 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. <i>All employees, whether full-time or part-time, must be positive time recording.</i></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>Click Enter and Save.</p>
<p>Subtypes for infotype Absences pop-up</p>	<p>If the employee should not accrue leave or longevity while on unpaid leave, enter Time code 9400 (LWOP) in IT2001.</p>
<p>Subtypes for infotype Time Quota Pop-up</p>	<p>X (close) out for this scenario because the employee has not elected to receive a lump sum payout.</p>

- 30. 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.
- 31. 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.

Part IV - Add Absences via PA30

You've just been informed that Janet Thomas does not have enough approved leave or sick time for her FMLA leave. You will need to create an Absences (IT2001) infotype on a weekly basis for the expected 480 hours of LWOP (9400) over the course of Janet's LOA.

 **BUSINESS PROCESS NOTE:** During Payroll Correction, it is *critical* to enter leave through the end of the payroll period. If leave is not entered for the period, the employee will not be paid correctly.

- 32. On the Easy Access screen, type **PA30** in the Command field or click the transaction in Favorites folder.
- 33. Enter **2001** in the Infotype field in the Direct Selection area.
- 34. Click **Enter**.
- 35. Click **Create**.
- 36. Select **Leave Without Pay (9400)**.
- 37. In the End date field, choose a date that goes through the end of the current work period. Remember that we changed Janet's work schedule to run from Sunday-Saturday. (DO NOT PRESS ENTER!)
- 38. Click (DO NOT PRESS) **Enter**. Look at the **Absence hours** field.
How many hours did you capture for LWOP? ____
- 39. If you are satisfied with your results, click **Enter**.
- 40. Click **Save**. The PA30 screen is displayed again.
- 41. For practice, create another week of LWOP for Janet.
- 42. If you are satisfied with your results, click **Enter**.
- 43. Click **Save**. The PA30 screen is displayed again.
- 44. Click **All** in the Period section.
- 45. Click **Overview**. You will see several Absences for Janet. The first two records should be the ones you created. Let your instructor know if you do not see 2 different records for Janet Thomas.

This exercise is complete.

LOA - Worker's Compensation

Terms and Definitions

The following descriptions were taken from the *PA Action Reasons Definitions* Job Aid.

- WC 7 day waiting period – employee waiting period before Workers' Compensation benefits begin. Effective date will be the 1st day out of work. (Optional)
- WC Leave of Absence w/supplement – employee is removed from work by the treating physician and has opted to exhaust available leave according to the OSHR WC Supplemental Leave Schedule. This is effective the 8th day of absence.
- WC Leave of Absence – employee is placed on Workers' Compensation Leave. This is effective 8th day of absence; employee is not using supplemental leave.
- WC Salary Continuation Pay – employee is placed on Workers' Compensation leave with Salary Continuation pay for up to two (2) years from date employee is unable to work either a partial or full day. Injury is result from or arises out of episode of violence, resistance, or due to other special hazards that occur while eligible person is performing official duties. Authorized treating physician has removed employee from work or injury related work restrictions cannot be accommodated by employer. TPA investigation/OSHR review/agency approval required. (See NCGS §143-166.14)

 **NOTE:** WC LEO Continuation Pay & WC Non-Sworn Officer is now covered by WC Salary Continuation Pay. (See NCGS 143-166.14).

- WC Continuation Pay for Teachers Only - employee works in any educational institution supported by and under control of the State placed on Workers' Compensation leave with Salary Continuation pay for up to 1 year from date employee is unable to work either a partial or full day. Injury is due to "episode of violence". Authorized treating physician has removed employee from work or injury related work restrictions cannot be accommodated by employer. TPA investigation/agency approval required. (See NCGS §115C-338)

Guidelines for Application of Dates

7-Day Waiting Period

The day the injury occurred is not counted as part of the 7-day waiting period. You may or may not include the weekends (see Weekend section below).

When the 7 days of the Waiting Period are not consecutive

If an employee takes the 7 days waiting period on non-consecutive days, you may enter several LOA Actions but are not required to do so. 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 on consecutive days 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 days is lost wages. See the explanation at the end of Exercise 2.2.

When to include weekends

If the doctor's Work Status note takes the employee out of work on Friday and indicates the employee can return to work on Monday, you count the weekend as part of the 7-day waiting period. However, if the employee gets hurt early in the week, but is back at work on Friday, then out again on Monday, you do not count the weekend.

8th day of Injury

If the employee is still out of work after the 7-day waiting period, you will create a new LOA Action on the 8th day using the applicable WC reason. The injured employee is on Workers' Compensation leave as authorized treating physician has removed employee from work, or injury related work restrictions cannot be accommodated by employer **AND** employee opts to exhaust a certain amount of sick/vacation/bonus leave per week in accordance with OSHR schedule to supplement WC benefits. Workers' Compensation Supplemental Leave Schedule.

 **NOTE:** Employee **MUST BE** out 40 hours per week.

On eighth (8th) day injured employee is on Workers' Compensation leave as authorized treating physician has removed employee from work or injury related work restrictions cannot be accommodated by employer. Employee is not using supplemental leave.

 **NOTE:** Employee **MUST BE** out 40 hours per week.

- An LOA Action must be created effective the 8th day after the injury.

Workers' Compensation Supplemental Leave Schedule

Effective October 1, 1987, the State Personnel Commission policy allowed an employee to supplement the weekly benefit by use of earned sick or vacation leave. Employees on workers' compensation leave drawing temporary total disability benefits may supplement the weekly benefit by the use of earned sick or vacation leave, in accordance with a schedule published by the Office of State Human Resources each year. Since the employee must receive the weekly benefit, this will provide an income approximately equal to their take home (after taxes) pay prior to their injury.

The maximum weekly Workers' Compensation benefit effective January 1, 2016 is \$944.00. This new maximum amount is not applicable to injuries that occurred before January 1, 2016

See the link listed below to the OSHR Workers' Compensation Supplemental Leave Schedule:

<http://oshr.nc.gov/document/workers-compensation-supplemental-leave-schedule>

EXERCISE 2.2: LOA - Worker’s Compensation

SCENARIO

Patricia Calloway is a permanent employee at Natural and 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. Patricia has elected to use the WC 7-day Waiting 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.

Instructions

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

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

- A. WC 7-day Waiting Period (Optional)
- 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

ACTION A: WC 7-DAY WAITING PERIOD

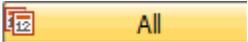
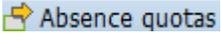
Part I (of A) - Initiate Workflow

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

PERSONNEL #: <i>Patricia Calloway</i>							
A	80000306	F	80000311	K	80000316	P	80000321
B	80000307	G	80000312	L	80000317	Q	80000322
C	80000308	H	80000313	M	80000318	R	80000323
D	80000309	I	80000314	N	80000319	Inst 1	80000324
E	80000310	J	80000315	O	80000320	Inst 2	80000325

Write the Personnel number on your Transaction Log.

5. Click .
6. Click . The Quota Overview screen displays.
7. Verify the Rem. Column for vacation and also sick leave:
8. Vacation:_____. Does the employee have enough vacation for the 7-day waiting period?_____
9. Sick_____. Does the employee have enough sick to use supplemental pay for 6 months? _____
10. 8.Type **/nZPAA076** in the Command field on the Quota Overview screen.
11. 9.Click **Enter**. The Employee Action Request screen displays.
12. 10.Enter the following data:

Field	Value
Effective on	Tomorrow's date (employees get paid for the first date injured) Write on your Transaction Log for Eff Date A.
Action Type	Leave of Absence
Reason	WC 7-day waiting period

13. Click **Enter**.
14. Click **Create** . The second screen of the Employee Action Request screen is displayed.

15. Enter the following data:

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

16. Click **Enter**.

17. Click **Save**. The Information pop-up displays with the assigned PCR number.

18. Write the PCR number on the employee paperwork (in class, use your Transaction Log - **PCR# B**).

19. Click the **green check mark** to close the pop-up box.

20. 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.

21. Select **Create > Create Note**.

22. Enter a **note title**.

23. 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.

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

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

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

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

Part II (of A) - Wait for Approval

Your instructor and/or navigator will perform this part.

Part III (of A) - Process Approved PCR

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

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

30. 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.
-  **CRITICAL!** 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.
31. 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).

32. 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)

33. Click **Execute**  .

34. Complete the following fields:

Field	Value
Actions (IT0000)	
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.
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
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	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.
Comment	The 7-day waiting period ends. Change the record on the 8 th day to a new LOA and WC reason. To view a list of your tasks, you must run the <i>Date Monitoring Report (transaction S_PHO_48000450)</i> or the <i>BOBJ report B0099 – Employee Deadline</i> .
Delimit Objects on Loan (IT0040)	Click Next Record icon. 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>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.</p> <p> CRITICAL! 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> <ul style="list-style-type: none"> • Verify the employee is on a D01N08GN work schedule. • Change the EE to Positive recording if necessary. <p>Enter and Save.</p>
<p>Subtypes for Absences infotypes</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 LOA effective date.</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>Click Enter.</p> <p>Click Save when the hours accurately calculate.</p>
<p>Subtypes for Time Quota Compensation Pop-up (IT0416)</p>	<p>Click Close.</p>

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

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

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

The WC 7-day Waiting Period Action is complete.

ACTION B: 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

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

Field	Value
Personnel number	Use the same personnel number for Patricia Calloway that you used on the previous exercise. You should have recorded it on your Transaction Log.
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) Record this date on your Transaction Log.
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 record the PCR number on your Transaction Log.
- Write a note for the approvers
- Initiate Workflow

Part II (of B) - Wait for Approval

Your instructor and/or navigator will perform this part.

Part III (of B) - Process Approved PCR

 We will not enter the Supplement in class today, but you would process it back at your office.

 **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.”
 - **Objects on Loan:** You should have delimited any object on loan necessary during the 7-day waiting period.
- Explicitly complete Workflow item.

The WC LOA w/ Supplement Action is complete.

PA30

- Now access PA30 > Absences infotype and exhaust leave as necessary.

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 am. 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).

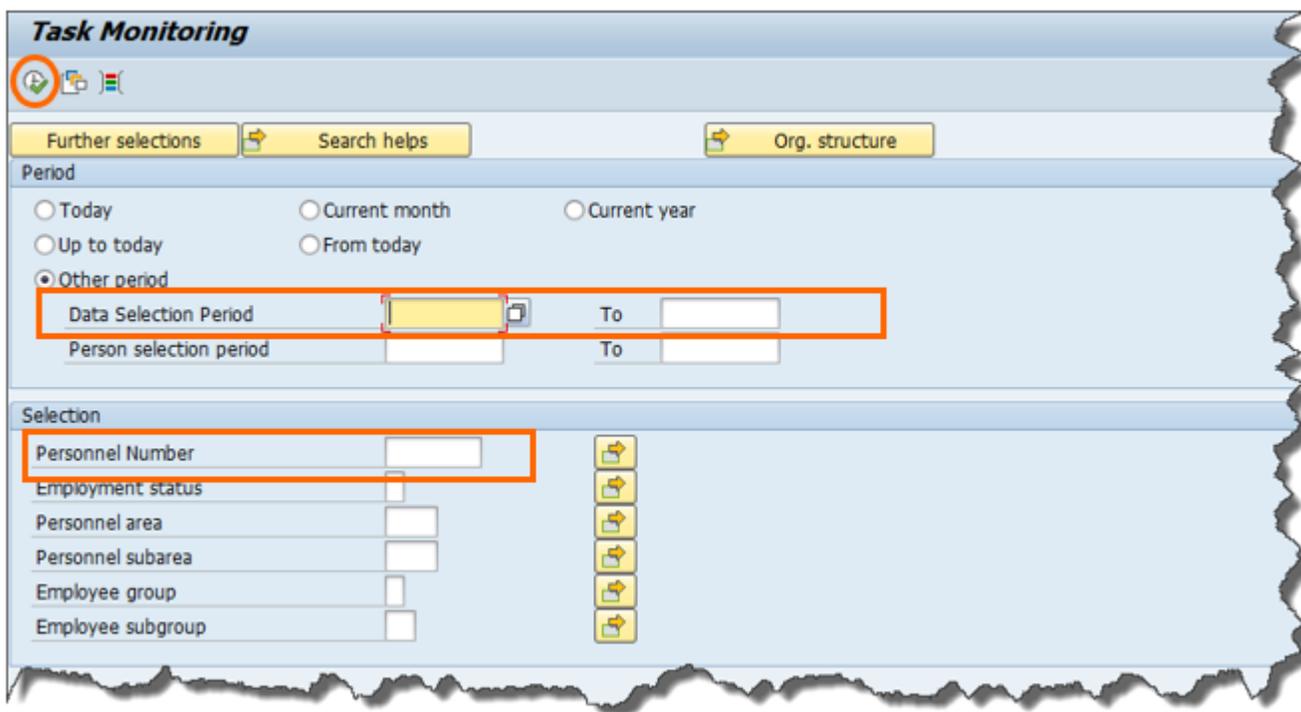
1. LOA Action – WC 7-day waiting period, dated 1/11 until end of time

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.

Objects on Loan (IT0040)



The Objects on Loan infotype (IT0040) is a great tool to track what items have been issued to an employee. Items should be created individually so that they can be maintained on an as-needed basis. In some cases of LOA, items should be delimited while the Employee is out on leave. They can be re-issued at Reinstatement.

Date Monitoring Report

The Date Monitoring Report can be run from the SAP Easy Access screen via the following menu:

Select SAP menu > Human Resources > Personnel Management > Administration > Infosystem > Reports > Employee > Date Monitoring (S_PHO_48000450).

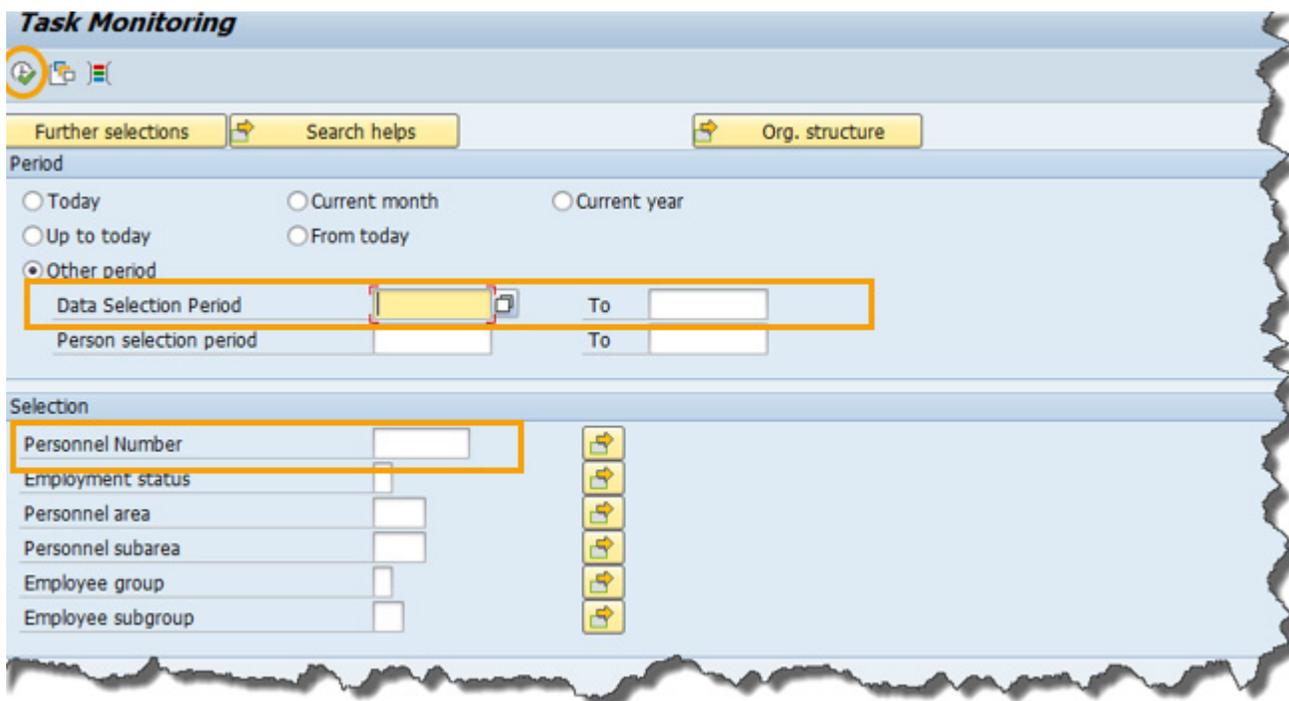
In addition, you can run a report on due tasks in BOBJ. The report, B0099 – Employee Deadline Dates (illustrated below).

EXERCISE 2.3: Date Monitoring Report

SCENARIO

Run the Date Monitoring report and listen as your instructor explains some of the features of the report.

1. Type **S_PHO_48000450** in the Command field on the Easy Access screen or click on it in your SAP favorites if you have it saved as a favorite.



2. Enter the following dates in the Other Period (Data Selection Period) field.

First day of Previous Month TO 12/31/9999

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

PERSONNEL #: <i>Patricia Calloway</i>							
A	80000306	F	80000311	K	80000316	P	80000321
B	80000307	G	80000312	L	80000317	Q	80000322
C	80000308	H	80000313	M	80000318	R	80000323
D	80000309	I	80000314	N	80000319	Inst 1	80000324
E	80000310	J	80000315	O	80000320	Inst 2	80000325

4. Click the **Execute**  button located at the top left corner of the screen.

The report is displayed. Listen as your instructor explains options on this screen.

 **NOTE:** This report can also be run by Personnel Area.

This exercise is complete.

SUMMARY

In this lesson you learned to:

- Determine the appropriate reason for a LOA (Leave of Absence) Action
- Enter the data to initiate and complete a Leave of Absence for various reasons
- Run the Date Monitoring Report

Reinstating an Employee from LOA

<p><i>Introduction</i></p> <p><i>Lesson 1: Leave of Absence Overview</i></p> <p><i>Lesson 2: Creating a Leave of Absence</i></p> <p><i>Lesson 3: Reinstating an Employee from LOA</i></p> <p><i>Lesson 4: Benefits and Leave of Absence</i></p> <p><i>Lesson 5: Course Review</i></p>
--

Lesson 3 Objectives

This lesson focuses on the process and infotypes that are applicable to reinstating employees from Leave of Absence.

- Reinstating an employee from Leave of Absence

EXERCISE 3.1: Reinstatement/Reemployment

SCENARIO
<p>Patricia Calloway (the same employee from a previous exercise) has <u>fully</u> recovered and is released to return to work. Assume today is six months since the effective date of her initial LOA. Reinstating 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.</p> <p>Patricia will return to the <u>same</u> work schedule and time management type as she was prior to going on LOA which was:</p> <ul style="list-style-type: none"> • D01N08GN • Negative time employee

“Field Trip” to OSC Training Team HELP page

Follow your instructor’s directions as he/she shows you how to access the PA Actions/Reasons/Definitions job aid on the OSC Training Team HELP website.

- You will view the reasons for the Reinstatement/Reemployment Action.

 **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.

Date Specifications infotype when you are reinstating LOA employee: Review the Agency date and adjust it per your Agency’s process. With the exception of specific Judicial employees, longevity is not associated with IT0041.

 **CRITICAL!** - Be sure to use the correct Return reason for the Reinstatement/Reemployment Action. Use the *PA Actions Reasons Definitions Job Aid* to assist in determining the correct reason.

Instructions

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

Part I - Initiate Workflow as the 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:
 - From the table below, select the **Personnel number** assigned to you by your instructor and enter it into the Personnel number field.

PERSONNEL #: <i>Patricia Calloway</i>							
A	80000306	F	80000311	K	80000316	P	80000321
B	80000307	G	80000312	L	80000317	Q	80000322
C	80000308	H	80000313	M	80000318	R	80000323
D	80000309	I	80000314	N	80000319	Inst 1	80000324
E	80000310	J	80000315	O	80000320	Inst 2	80000325

Write the Personnel number you used on your Transaction Log.

- **Date:** six months from the original LOA (record on Transaction Log)
- **Action:** Reinstatement/Reemployment
- **Reason:** Return from Workers’ Comp with MMI Complete
- Save the PCR and record it on your Transaction Log
- Write a note for the approvers
- Initiate Workflow

Part II - Wait for the PCR Approval

Your instructor and/or navigator will perform this part.

Part III - Process the Approved PCR

 **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

This exercise is complete.

Returning from Workers' Compensation Less Than Full Time

20 or More Hours

Scenario

- Full-Time employee returns to work for 4 hours; is paid by WC the other 4 hours. You will perform 2 different actions with the same effective date: Reinstatement/Reemployment and Appointment Change
- **Action #1: Reinstatement/Reemployment Workflow (ZPAA076)**
 - **Reason: Return from Workers' Comp with Physician Restrictions that state a Modified Duty of 20-40 hrs**
- After approval received, execute Personnel Action PCR
- After the employee has been Reinstated, create an Appointment Change Action with the same effective date as the Reinstatement Action.
- **Action #2: Appointment Change Workflow (ZPAA076)**
 - **Reason: Full-time to Part-time**

NOTE: Be sure to pro-rate the annual salary based on the number of hours the employee is available to work. (In this case, the employee can work 4 hours per day. The annual salary will be pro-rated by 50%)

- After approval received, execute Personnel Action PCR
 - **IT0000 Actions** – Enter & Save
 - **IT0001 Org Assignment** – Enter & Save
 - **IT0007 Planned Working Time**
 - ❖ Select appropriate part-time schedule
 - ❖ Positive Time Recording
 - ❖ Check the Part-time employee box
 - ❖ Employment Percentage will always stay at 100%
 - ❖ Weekly working hours will default based on work schedule rule.

- **IT0008 Basic Pay**
 - ❖ Enter reason (Appointment Change)
 - ❖ Salary will default from PCR. Verify that the salary has been pro-rated correctly.
- **IT0019 Monitoring of Tasks**
 - ❖ Task Type: Enter reason (Appointment Change)
 - ❖ Date of Task: 6 weeks
- **IT0040 Objects on Loan** – Enter & Save or Add Objects on Loan depending upon whether you delimited objects on LOA Action
- **IT0041 Date Specifications** – Enter & Save
- Leave Administrator adjusts holiday quotas as required
- **NOTE:** Since the Employee is part-time, their longevity will be pro-rated but is eligible for full longevity. If longevity becomes due, the Agency should contact BEST Shared Services to have the employee's longevity amount corrected.
- **NOTE:** Accruals will be pro-rated. The Agency must track accruals manually for correction at a later date.
- **NOTE:** Employees are eligible for full health insurance. Submit a ticket to BEST to ensure Health Insurance remains fully intact.

Return to Complete Status

Once the employee has been approved to return to full duty, you must create a new PCR and action with the new reason (Return from Workers' Comp with MMI Complete)

Scenario

- Employee is now able to expand the hours worked from 4 to 8 per day.
- **Action #1:** Reinstatement/Reemployment Workflow (ZPAA076)
 - **Reason:** Return from Workers' Comp with MMI Complete
- After approval received, execute Personnel Action PCR.
- After the employee has been reinstated, create an Appointment Change with the **same effective date** as the Reinstatement Action.
- **Action #2:** Appointment Change Workflow (ZPAA076)
 - **Reason:** Part-time to Full-time
- **NOTE:** Be sure to restore the annual salary back to the Full-time, pre-injury rate.
- After approval received, execute Personnel Action PCR.
 - **IT0000 Actions** – Enter & Save
 - **IT0001 Org Assignment** – Enter & Save
 - **IT0007 Planned Working Time**
 - ❖ Select appropriate Full-time schedule
 - ❖ Select appropriate Time Management Status
 - ❖ Make sure part-time box is NOT checked.
 - ❖ Employment Percentage will always stay at 100%
 - ❖ Weekly working hours will default based on work schedule rule.
 - **IT0008 Basic Pay**
 - ❖ Enter reason (Appointment Change)
 - ❖ Salary will default from PCR. Verify that the salary is correct.
 - **IT0019 Monitoring of Tasks** - *next screen*
 - **IT0040 Objects on Loan** – Enter & Save or Add Objects on Loan depending upon whether you delimited objects on LOA Action
 - **IT0041 Date Specifications** – Enter & Save
- Employee enters:
 - 9500 for 8 hours worked
- Leave Administrator adjusts holiday quotas as required
- **NOTE:** Upon the employee's return to Full-time status, the Agency will need to update leave accrual balances.

Additional Resources

Click (or copy and paste in your Internet browser) the link below to access the OSC Training HELP website:

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

Use the following path to locate additional support material for WC LOA:

Personnel Administration > BPPs

- Resinstement Action from LOA Workers' Comp
- LOA - Workers' Comp

Personnel Administration > Job Aids

- LOA Requirements
- LOA/Reinstatement Checklist - Workers' Compensation
- Worers' Comp BEACON Actions and Reasons Summary Chart
- Reinstatement from LOA Workers' Comp and Appointment Change Process

SUMMARY

In this lesson you learned to:

- Reinstatement an employee from Leave of Absence

Benefits and Leave of Absence

Introduction
Lesson 1: Leave of Absence Overview
Lesson 2: Creating a Leave of Absence
Lesson 3: Reinstating an Employee from LOA
Lesson 4: Benefits and Leave of Absence
Lesson 5: Course Review

Lesson 4 Objectives

Although this course is focused on the Personnel Administration aspect of LOA, it is important to understand how LOA affects benefits.

- Explain the various role responsibilities when an employee is on LOA
- Describe how benefits are affected when an employee is on paid versus unpaid LOA
- Identify how benefits are re-instated when an employee returns from paid versus unpaid LOA

Roles and Responsibilities

There are several roles involved when an employee goes out on LOA as outlined below.

- Personnel Administrator
 - Enter the LOA Action as soon as the employee goes out on leave.
 - Maintain IT2001.
- Benefits Representative
 - Counsel employees on their benefit plans.
 - Provide employee with the OSC HR/Payroll LOA (ZBNS008) or a similar letter.
 - Instruct employee to pay NC Flex vendors directly to continue benefits while on an unpaid LOA.
 - Instruct employee to pay BEST to continue SHP benefit when applicable.
- Employee
 - Send agency-specific benefit premiums.
 - Send premium payments directly to NC Flex vendors to continue plans.
 - Send premium payments directly to BEST for SHP to continue.
 - Re-enroll in benefit plans within 30 days from return date.
- BEST
 - Delimit NC Flex plans when LOA without pay begins.
 - Delimit SHP when premium payments are not paid.
 - Monitor reinstatement enrollments to ensure employees are re-enrolled into appropriate plans.

Benefits and Leave of Absence Using Leave

Definition: Employee is using paid leave (approved and/or sick leave).

 **NOTE:** Does not include employees on Short Term Disability (STD) Benefits.

Benefits

- NC Flex and State Health Plan (SHP) benefits will continue uninterrupted.
- Agency specific benefits will continue unless the agency delimits these plans.

As long as the employee is using leave (which does not include receiving Short-Term Disability nor Worker's Comp benefits or Workers Comp using supplemental leave), the employee's NC Flex and State Health Plan benefits will continue as usual. Deductions for Agency specific benefits will continue unless the Agency delimits (puts an end date) on those plans.

Leave of Absence Not Using Leave

Definition: Employee is not using paid leave.

 **NOTE:** Includes employees on Short Term Disability (STD) Benefits and employees on a Worker's Compensation and Worker's Comp LOA using supplemental 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 unpaid LOA by paying the NC Flex vendors directly.
- Premiums will not be deducted from STD Benefit or WC payments.

Note that an employee who is receiving Short Term Disability or Worker's Comp benefits is considered to be on leave without pay. That is because their benefit payments are not being made via OSC HR/Payroll.

When on unpaid leave, employees must be responsible for paying NC Flex vendors directly.

State Health Plan

- Employer contribution will continue for the following LOAs:
 - Family Medical Leave
 - Worker's Compensation Leave
 - Military Reserve Active Duty Leave (State Service)
 - STD Leave – Only while receiving STD benefits when an employee has more than 5 years of retirement creditable service (indicated by Contract field on Org Assignment IT0001).
- Employees are still responsible for their dependent premiums.
- If dependent premiums are not paid, the benefit plan will be changed to employee only coverage.

There are certain types of leave (listed above) that entitle the employee to have the employer contribution to continue for State Health Plan (SHP). Otherwise, the employee must be responsible for both employer and employee contribution when on unpaid leave.

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

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

Reinstatement of Benefits

LOA using Leave

- If the employee was using leave throughout the LOA period, then benefits will continue without interruption.

LOA not using Leave

- Agency-Specific Benefits
 - Employee must contact Benefits Representative to re-enroll in plans.
- NC Flex Plans
 - LOAs less than 30 days, employee must restart all plans enrolled prior to the LOA.
 - LOAs greater than 30 days, employee can choose to re-enroll in any plans enrolled prior to the LOA.
 - ❖ If employee enrolls in plans that he or she was not paying vendors directly, Evidence of Insurability (EOI) and/or waiting periods may apply.
 - Health Care Flexible Spending Account must restart.
- State Health Plan (SHP)
 - If employee paid premiums, then premiums will now be paid from active earnings.
 - If employee did not pay premiums, then employee must re-enroll in the plan to start coverage as an active employee.

For Workers' Compensation...The agency will need to submit a ticket to BEST Shared Services to ensure the continuation of health insurance benefits as a full-time employee.

This should be coordinated with the Agency HR's creation of an Appointment Change Action to change the employee back to Full-Time status.

- Reinstatement of NC Flex and State Health Plans benefits
 - Must re-enroll in any plans within 30 days after returning to work.
 -  **NOTE:** If the 30 day deadline is missed, employees must wait for the next annual enrollment or qualifying event.
 - Employees can enroll through Benefitfocus/eEnroll. Click the Enroll link and follow prompts.

SUMMARY

In this lesson you learned to:

- Explain the various role responsibilities when an employee is on LOA
- Describe how benefits are affected when an employee is on paid versus unpaid LOA
- Identify how benefits are re-instated when an employee returns from paid versus unpaid LOA

Course Review

Introduction
Lesson 1: Leave of Absence Overview
Lesson 2: Creating a Leave of Absence
Lesson 3: Reinstating an Employee from LOA
Lesson 4: Benefits and Leave of Absence
Lesson 5: Course Review

Course Objectives

In this course you learned to:

- Describe the various reasons for a Leave of Absence and determine when each is applicable to use
- Execute a Leave of Absence
- Run the Date Monitoring Report
- Reinstatement an employee from Leave of Absence

Next Steps

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

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

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

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

Need transactional assistance?

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

Course Assessment/Evaluation

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

- 📁 Don't forget to click the SUBMIT button---**TWO DIFFERENT TIMES!**

CONGRATULATIONS!

You've completed the course!

Absences Worksheet

SCENARIO:

- EE is going out on LOA effective December 14, 2015 through January 31, 2016.
- EE is placed on D01N08GN work schedule effective 12/14 and is paid monthly.
- EE wishes to exhaust all leave beginning with Approved Leave.
- Quota balances as of Dec 14:
 - Approved Leave: 88 hours Earns **17.33** hours monthly
 - Sick Leave: 80 hours Earns **8.0** hours monthly

QUESTION:

How would the absences be entered in IT2001? Write A/A codes for each work day below.
 (HINT: Don't forget the leave that will accrue while EE is in pay status using leave!)

December 2015						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
		1	2	3	4	5 OFF
6 OFF	7	8	9	10	11	12 OFF
13 OFF	14	15	16	17	18	19 OFF
20 OFF	21	22	23 H	24 H	25 H	26 OFF
27 OFF	28	29	30	31		
January 2016						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
					1 H	2 OFF
3 OFF	4	5	6	7	8	9 OFF
10 OFF	11	12	13	14	15	16 OFF
17 OFF	18 H	19	20	21	22	23 OFF
24 OFF	25	26	27	28	29	30 OFF
31 OFF						

PA420 Transaction Log

EX #	Exercise Title	Data to Enter	PCR Number	PCR Eff. Date
2.1	LOA – FMLA Action <i>JANET THOMAS</i>	PERNR used: _____	PCR #: _____	Date: _____
2.2	LOA – Worker’s Compensation Action <i>PATRICIA CALLOWAY</i>	PERNR used: _____	PCR #: - A: _____ PCR #: - B: _____	Date - A: _____ Date - B: _____
3.1	Reinstatement/Reemployment Action <i>PATRICIA CALLOWAY</i>	PERNR used: _____	PCR #: _____	Date: _____

