



ADVANCED LEAVE

TM-57 | TRANSACTION PA61

TM

The purpose of this Business Process Procedure is to explain how to enter Advanced Sick leave or Advanced Vacation leave in the Integrated HR-Payroll System.

Trigger: There is a need to enter Advanced Sick leave or Advanced Vacation leave in the Integrated HR-Payroll System.

Business Process Procedure Overview:

OSHR policy allows advanced leave to be granted to employees provided it is formally approved by the employee's supervisor. With proper approval, an employee can receive advances of Sick and Vacation leave in amounts not exceeding that which an employee will accrue within the remainder of the calendar year. Due to the fact that an employee cannot maintain negative leave balances in the Integrated HR-Payroll System, a Time Administrator will create a separate Absence Quota equal to the approved amount of Advanced Leave. When the Advanced Leave quota is reduced, the system will create and manage a separate Attendance Quota to represent the liability that the employee owes the State by using leave in advance of accruing it. As leave is accrued, the liability is then reduced accordingly. Policy also allows for recovery from Overtime, GAP, Callback to satisfy the liability.

Advanced Leave quotas are created using the Quota Corrections Infotype (Infotype 2013). There are two subtypes of Infotype 2013 that are relevant to the State's Advanced Leave policy:

- Advanced Vacation (Subtype 31)
- Advanced Sick (Subtype 32)

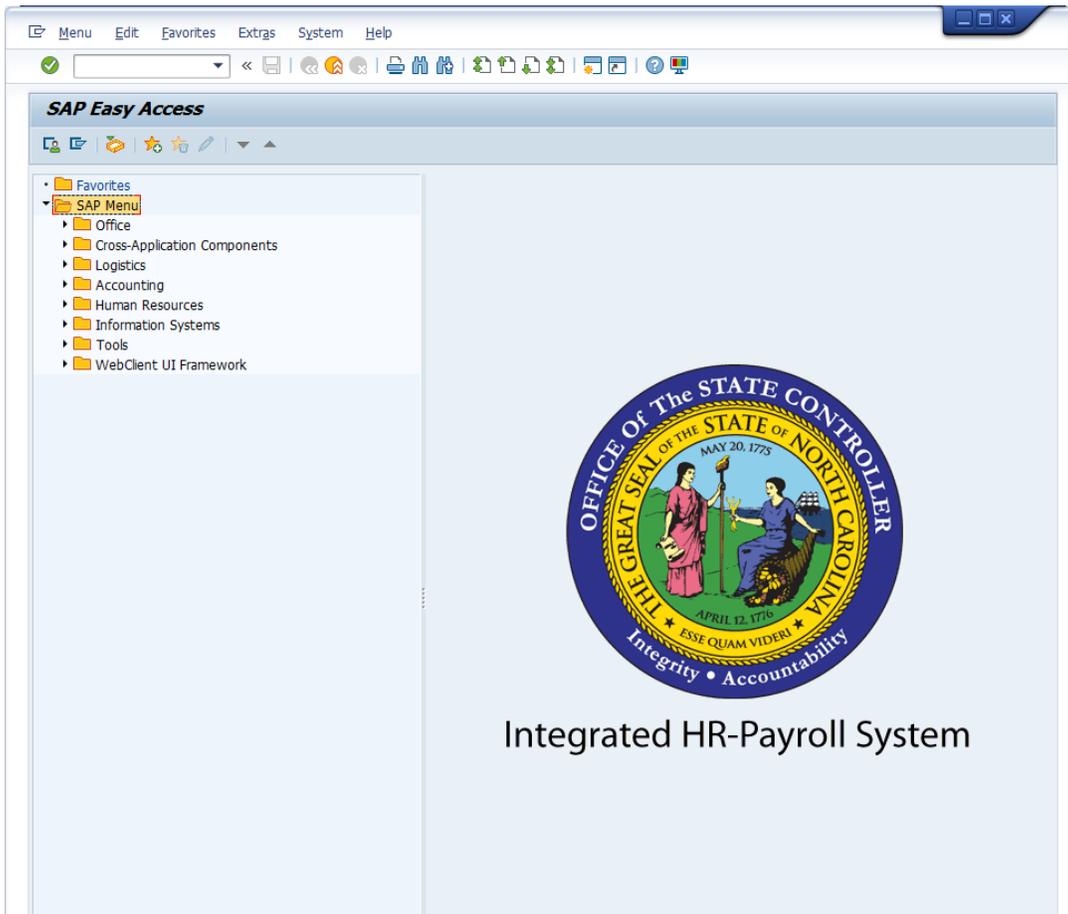
This BPP will detail: Manually creating an Advanced Leave quota.

Access Transaction:

Via Menu Path: SAP menu >> Human Resources >> Time Management >> Administration >> Time Data >> PA61 – Maintain

Via Transaction Code: PA61

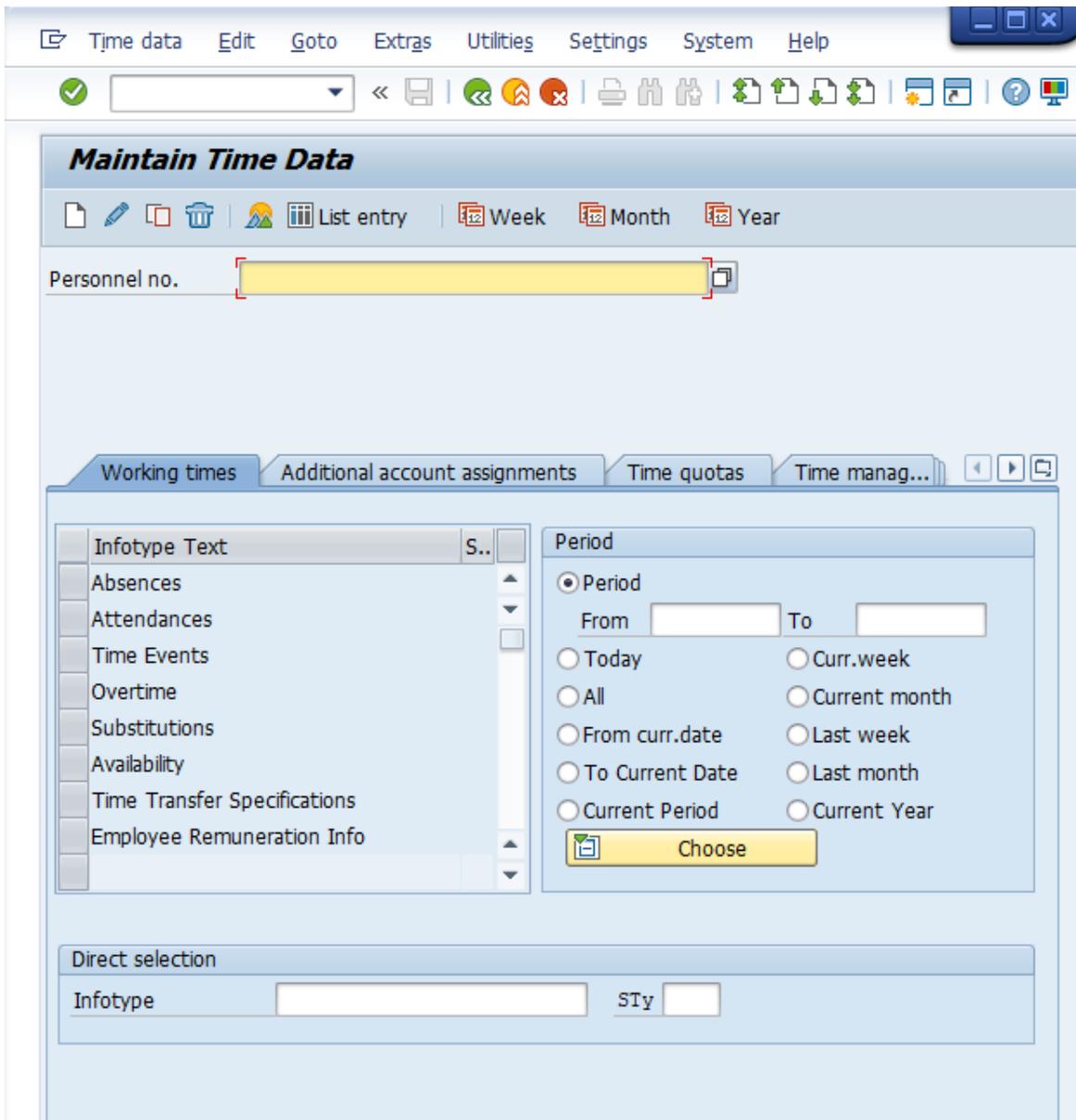
Procedure:



1. Update the following **required** and **optional** fields:

Field Name	Description	R/O/C	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	R	Enter value in Command. Example: PA61

2. Click **Enter**  button.



3. Update the following **required** and **optional** fields:

Field Name	Description	R/O/C	Values
Personnel no.	Unique employee identifier	R	Enter value in Personnel no.. Example: 80000532

4. Click **Enter**  button.



Information: Ensure the correct personnel number was entered after clicking Enter.

5. Update the following **required** and **optional** fields:

Field Name	Description	R/O/C	Values
From	Effective date of the personnel action	R	Enter value in From. Example: 1/6/2014
Infotype	Unique number identifying the type of data to be displayed.	R	Enter value in Infotype. Example: 2013



Information: The FROM date represents the current date or the date that the employee's Advanced Leave quota should be available for deduction. System will set the To date to the end of the calendar year automatically.

6. Update the following **required** and **optional** fields:

Field Name	Description	R/O/C	Values
STy	Infotype subtype.	R	Enter value in STy. Example: 32



Information: If the employee has been approved for Advanced Vacation Leave, enter subtype value [31]. If the employee has been approved for Advanced Sick Leave, enter subtype value [32].

7. Click **Create (F5)**  button.

The screenshot shows the SAP 'Create Quota Corrections' interface. The form includes the following fields and values:

- Personnel No:** 80000532
- Name:** Kathy Allen03
- EE group:** A SPA Employees
- Personnel ar:** 4601
- Natural and Cultural Resources:** Natural and Cultural Resources
- WS rule:** D01N08GN MTWHF-8,SaS-O
- Status:** Active
- Start:** 06/25/2020
- Absence quota type:** 32 Adv Sick Leave Allowed (The value '32' is highlighted with a red box in the original image)
- Change accrual entitlement:**
 - Quota number: [] Hours
 - Increase generated entitlement
 - Reduce generated entitlement
 - Replace generated entitlement
- Change transfer time:**
 - Transfer: Do not change transfer time

The SAP logo and system information (E1T (1) 801, bws1ap020204, INS) are visible at the bottom of the window.

8. Update the following **required** and **optional** fields:

Field Name	Description	R/O/C	Values
Quota number	The number of hours to be added or removed.	R	Enter value in Quota number. Example: 32



Caution: The Integrated HR-Payroll System will not validate the number of hours entered against the estimated leave hours the employee should accrue during the remainder of the year. The Time Administrator should validate that the approved hours comply with OSHR policy.

9. Click the **Transfer** dropdown.

The screenshot displays the SAP 'Create Quota Corrections' screen. At the top, there is a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main content area is titled 'Create Quota Corrections' and includes several tabs: 'Personal work schedule', 'Activity allocation', 'Cost assignment', and 'External services'. The 'Personal work schedule' tab is active. The form contains the following fields and values:

- Personnel No: 80000532
- Name: Kathy Allen03
- EE group: A SPA Employees
- Personnel ar: 4601
- WS rule: D01N08GN MTWHF-8,SaS-O
- Status: Active
- Start: 06/25/2020
- Absence quota type: 32
- Adv Sick Leave Allowed

Below these fields are two sections:

- Change accrual entitlement:** Includes a 'Quota number' field (empty) and 'Hours' label. Three radio buttons are present: 'Increase generated entitlement' (selected), 'Reduce generated entitlement', and 'Replace generated entitlement'.
- Change transfer time:** Includes a 'Transfer' dropdown menu. The dropdown is open, showing three options: 'Do not change transfer time' (highlighted), 'Transfer collected entitlement immediately', and 'Only transfer quota correction immediately'.

At the bottom of the screen, the SAP logo is visible along with system information: 'E1T (1) 801', 'bws1ap020204', and 'INS'.

- Select **Do not change transfer time** in the list box.



Information: The **DO NOT CHANGE TRANSFER TIME** option allows the Advanced Leave quota to be generated during the next Time Evaluation process and will be available to the employee the following day. Selecting this option also generates the correct ‘deduction from’ and ‘deduction to dates.’

The screenshot shows the SAP 'Create Quota Corrections' interface. The main data fields are as follows:

Personnel No	80000532	Name	Kathy Allen03
EE group	A SPA Employees	Personnel ar	4601 Natural and Cultural Resources
WS rule	D01N08GN MTWHF-8,SaS-O	Status	Active
Start	06/25/2020		

Below the main data, the 'Absence quota type' is set to 32 (Adv Sick Leave Allowed). The 'Change accrual entitlement' section shows a quota number of 32 Hours, with radio buttons for 'Increase generated entitlement' (selected), 'Reduce generated entitlement', and 'Replace generated entitlement'. The 'Change transfer time' section shows a dropdown menu for 'Transfer' set to 'Do not change transfer time'.

- Click **Save (Ctrl+S)** button.
- Click **Edit > Maintain text** and enter notes
- Click the Save button to save your notes. The Detail record screen will display again on your screen.

Create Quota Corrections

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

Personnel No: 80000532 | Name: Kathy Allen03
 EE group: A SPA Employees | Personnel ar: 4601 | Natural and Cultural Resources
 WS rule: D01N08GN MTWHF-8,SaS-O | Status: Active
 Start: 06/25/2020

Absence quota type: **32** Adv Sick Leave Allowed

Change accrual entitlement
 Quota number: 32.00000 Hours
 Increase generated entitlement
 Reduce generated entitlement
 Replace generated entitlement

Change transfer time
 Transfer: Do not change transfer time

Save your entries | SAP | E1T (1) 801 | bws1ap020204 | INS

14. Click the Save button  to save the record.
15. The system task is complete.

Additional Resources

Training HELP website: https://www.osc.nc.gov/state-agency-resources/training/training_help_documents

Change Record

Change Date: 6/23/20 – Changed by C. Ennis
 Changes: Updated format, assigned reference number, and made accessible