



LOA – SHORT TERM DISABILITY

PER-69 | TRANSACTIONS ZPAA076, SWBP, PA40

PA

The purpose of this Business Process Procedure is to explain how to process a Leave of Absence for Short Term Disability in the Integrated HR-Payroll System.

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

Business Process Procedure Overview:

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

Short-Term Disability Reasons:

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

Short-Term Disability Information:

It is the Agency's responsibility to:

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

IT2010 process – see end of document

Benefits (Employee is not using approved leave.)

Agency Specific Benefits

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

NCFlex Plans

- Will terminate in the Integrated HR-Payroll System.
- Will end the last day of the month premiums were paid.
- Employees can continue these benefits plans while on LOA by paying the NCFlex vendors directly.
- Premiums will not be deducted from STD payments.

State Health Plan

- Employees on STD will no longer be able to have their premiums for health insurance and/or NCFlex coverage payroll deducted. Employees will be billed by iTEDIUM for premiums owed for State Health Plan coverage. Employees with NCFlex Plans will need to follow the instructions outlined on the current Leave of Absence Letter for information regarding making these premium payments.
- Employees placed on LOA without pay can choose to discontinue their State Health Plan coverage or drop dependents from the plan and remain on employee only coverage. If an employee wants to discontinue their SHP coverage, they will need to submit a ticket to BEST Shared Services within 30 days of reaching a LOA without pay status.
- Employees placed on LOA without pay who would like to continue their coverage for dependents and/or any employee only costs will be billed by iTEDIUM. Failure to make payments will result in termination of the State Health Plan coverage. Employees whose coverage is terminated will not be able to re-enroll until the next open enrollment.
- Employees on LOA that requires them to pay full cost for their health insurance will be billed by iTEDIUM. If premiums are not received, their health insurance coverage will be terminated.

LOA Checklist

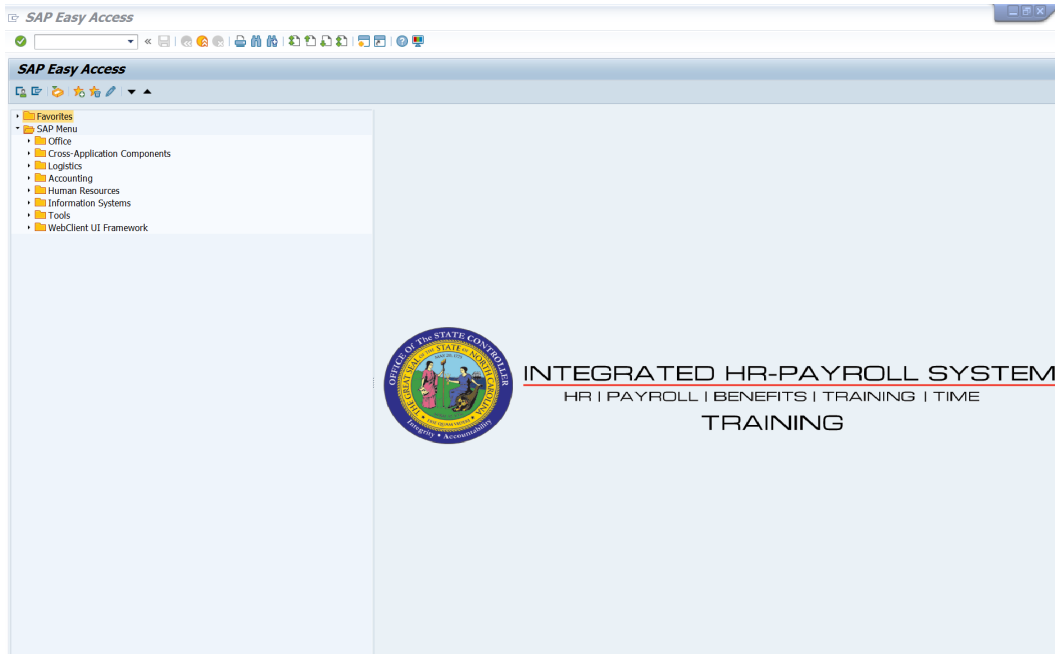
- PA20 Display (Employee is active in the system)
- IT0000 - Actions
 - View employee's Action history to ensure correct action is being entered and former actions have been entered appropriately.
 - Verify eligibility for requested leave.
- CATS_DA – verify that time has been entered, released, and approved. Also, verify last day worked (9500 - Time Worked).
- PT50 to ensure that employee has enough leave, if requesting to use leave.
- Communicate with the Benefits Representative
- Benefits – setup procedures for payment continuation or termination of benefits.
- Time, Benefits, Payroll, State Service, and longevity are dependent on entries made for action, reason and infotypes.
- Agency decides if Time (agency wide) is entered by PA (HR Data Maintainer) on IT2001 or Time (Time Administrator) in CAT2
- Employee should make no time entries while on LOA.
- Time Type 9500 (time worked) shouldn't be used while employee is on LOA.

Access Transaction:

Via Menu Path: Your menu path may contain this custom transaction code depending on your security roles

Via Transaction Code: ZPAA076; SBWP; PA40


Procedure



1. Update the following field:

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

2. Click the **Enter**  button.



Information





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

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

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

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

Employee Action Request

Existing PCR No.

Personnel No. Susan Castro

Last 4 digits (SSN) First Last

Effective on

Action Type Leave of Absence (NC)

Reason Short-Term Disability Regular

3. Update the following fields:

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

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

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

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

4. Click the **Enter**  button.





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

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

Note: Only select the “60 day waiting period” reason when FMLA has been completely exhausted.

Click Enter and verify the information is correct before proceeding.

Employee Action Request

Existing PCR No.

Personnel No. Susan Castro

Last 4 digits (SSN) First Last

Effective on

Action Type Leave of Absence (NC)

Reason Short-Term Disability Regular

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

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



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

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

- Update the following field:

Field Name	Description	Values
Annual Salary	Employee’s annual basic pay *Salary info should not change	Enter value in Annual Salary Example: 31,959

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

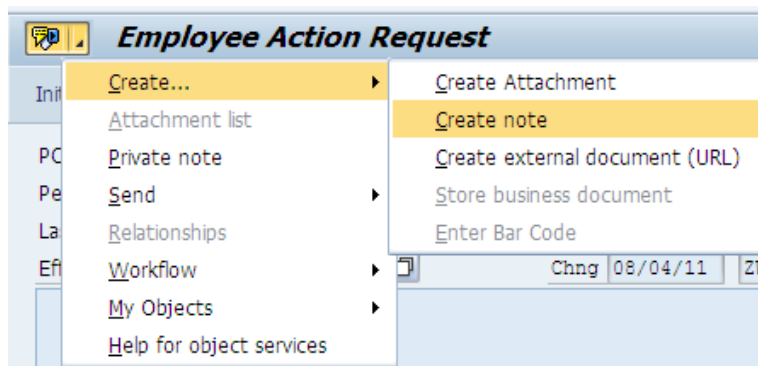
- Click the **Enter**  button.
- Click the **Save (Ctrl+S)**  button.

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



9. Click the **Enter**  button.

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



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

Notes entered during PA Workflow must follow OSHR’s Action Notes Template:

<https://www.osc.nc.gov/documents/action-notes-template>

If you need to type some information in, or copy and paste from an email, create a note. If you want to add a document as an attachment, use the attachment area.

This note and attachment area gets attached to this specific PCR only. It will follow the PCR through the approval/rejection process and live with the PCR into the future. When the PCR has been approved, and you are processing the Action (such as a New Hire action), you will need to recreate any notes or attachments if they need to be attached to the Action record as well.

12. Update the following fields:

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

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

Employee Action Request

Initiate WF

PCR Number:

Personnel Number: Susan Castro Action: Leave of Absence (NC)

Last 4 digits(SSN): Reason: S/T Disability 60 Day w/Period

Effective on: Chng: ZWFINOMPA031 St: Created

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

Basic Pay

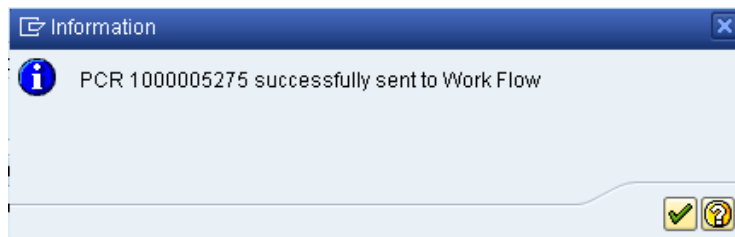
Pay Scale type	<input type="text" value="01"/> Graded	Pay Scale type	<input type="text" value="01"/> Graded
Pay Scale Area	<input type="text" value="01"/> Annual Salaries	Pay Scale Area	<input type="text" value="01"/> Annual Salaries
Pay Scale Group	<input type="text" value="GR66"/> Level <input type="text"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

Dates


Last day worked

13. Click the **Enter** button.
14. Click the **Save (Ctrl+S)** button.
15. Click the **Initiate WF** button.

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



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

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

18. The Initiate Leave of Absence Action is complete.

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

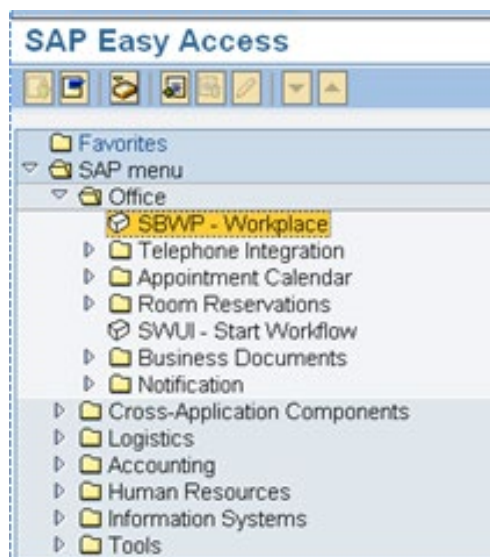
Instructions for Completing the Action

Access Transaction:

Via Menu Path: Office >> SBWP – Workplace

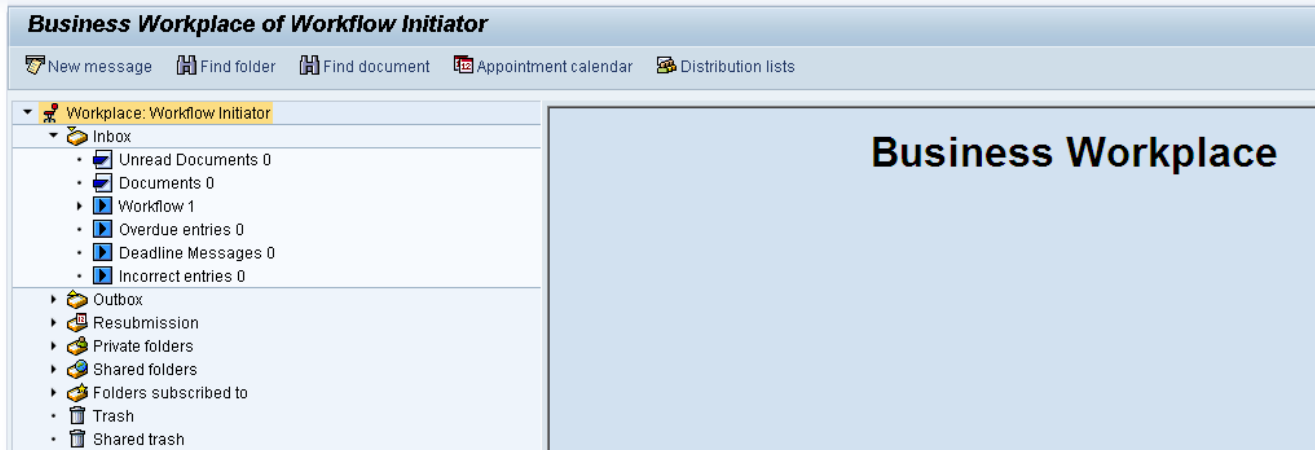
Via Transaction Code: SBWP, PA40

Procedure



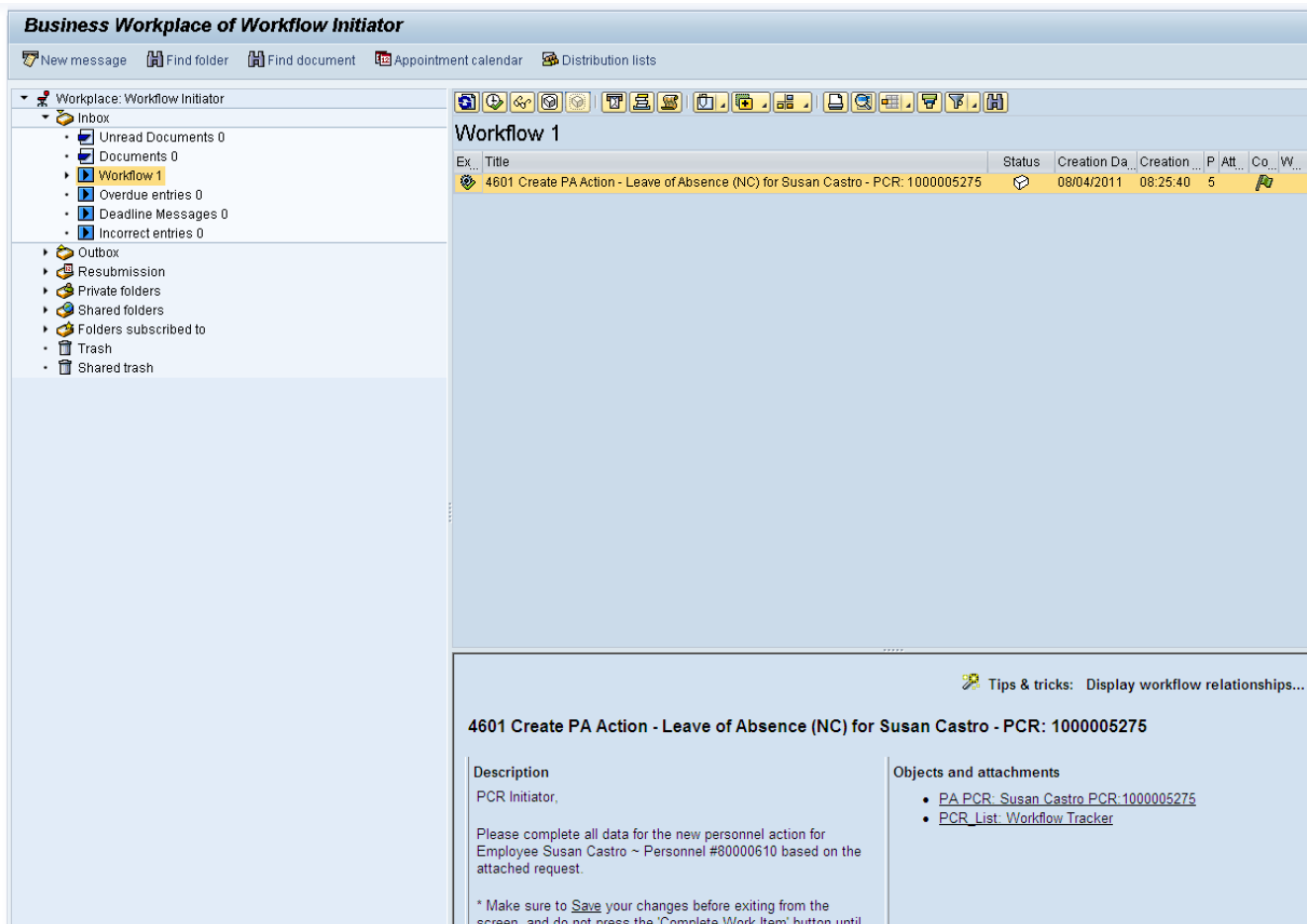
19. Click the **SAP Business Workplace (Ctrl+F12)**  button.

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



20. Select **Inbox >> Workflow**.

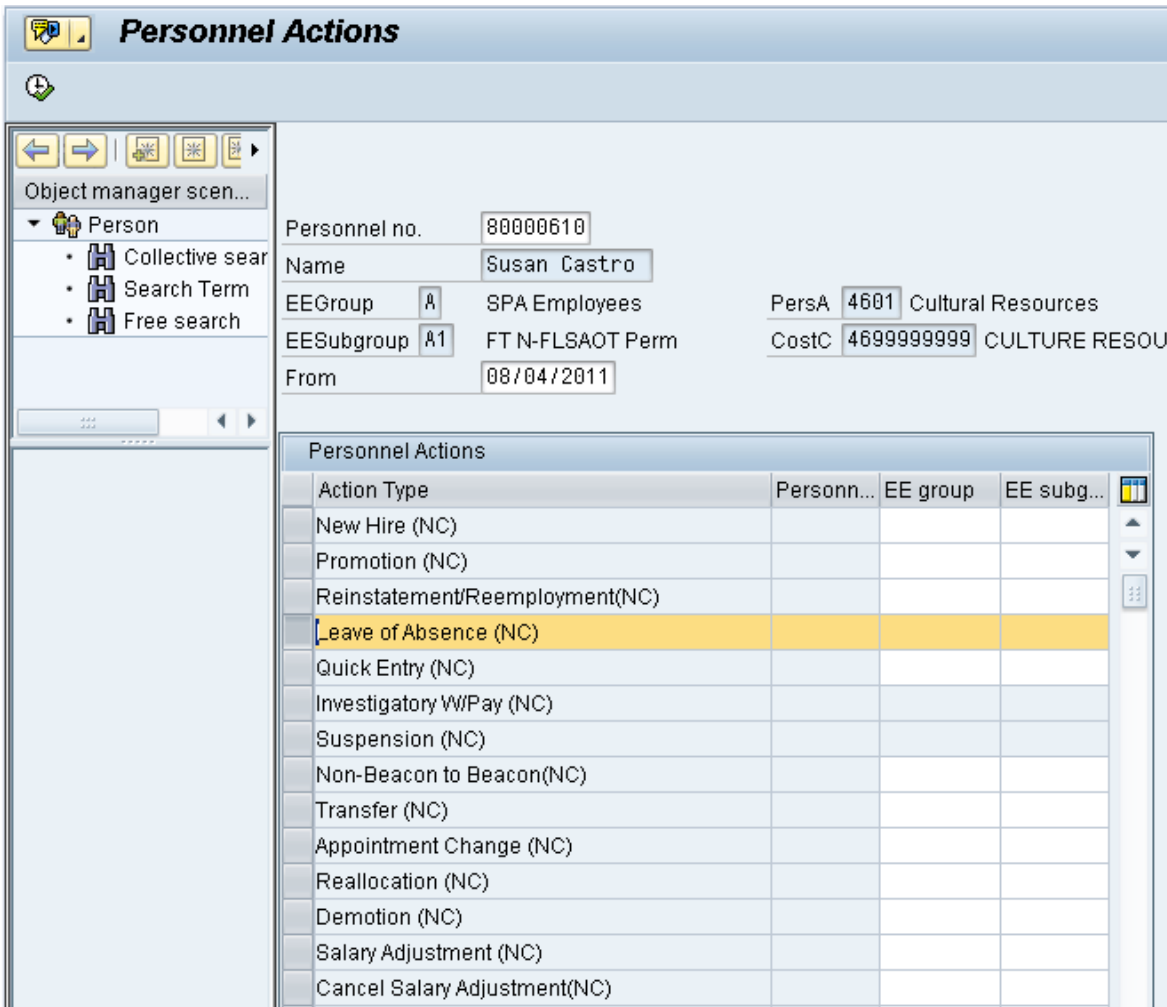
21. You can process using step 22 or step 23.



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

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

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



24. Update the following field:



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

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

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

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

Copy Actions (0000)

 Execute info group
 Change info group

Pers.No.

Name

EEGroup SPA Employees PersA Cultural Resources

EESubgroup FT N-FLSAOT Perm

Start to

Personnel action

Action Type

Reason for Action S/T Disability 60 Day w/Period

Status

Customer-specific

Employment

Special payment

Organizational assignment

Position Lighting And Interactive

Personnel area Cultural Resources


Employee group SPA Employees

Employee subgroup FT N-FLSAOT Perm

Additional actions


Start Date	Act.	Action Type	ActR	Reason for action


27. Click the **Enter**  button.

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

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

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

 Person and position have different employee groups/subgroups

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

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

Infotype Text













Enter or paste appropriate comments.|

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



CRITICAL! Don't forget to enter your comments. Remember you can cut and paste from the PCR.

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

Create Organizational Assignment (0001)

Org Structure

Personnel No Name

EEGroup SPA Employees PersA Cultural Resources

EESubgroup FT N-FLSAOT Perm Statu

Start to

Enterprise structure

CoCode STATE OF NC

Pers.area Cultural Resources Subarea 7day Norm

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

Fund CULTURE- SUSP...

Func. Area General Government

Personnel structure

EE group SPA Employees Payr.area NC Monthly

EE subgroup FT N-FLSAOT Perm Contract

Organizational plan

Percentage



Position 800904000859
Lighting And Interactiv...

Job key Msm Spl
Museum Specialist

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

Org.key

Note: If the employee has less than five years of state service, a ticket should be placed with BEST Shared Services.


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

Create Monitoring of Tasks (0019)

Personnel No Name

EEGroup SPA Employees PersA Cultural Resources

EESubgroup FT N-FLSAOT Perm Statu



Task

Task Type

Date of Task Processing indicator

Reminder

Reminder Date

Lead/follow-up time For specific task type

Comments

32. Update the following fields:

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

NOTE: You may need to create additional IT0019s via PA30. You can run the BOBJ Report – B0099 – Employee Deadline Dates. Managers can view for their employees via MSS.

(Example Only) 

Monitoring of Tasks

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

33. Click the **Enter**  button.


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

Delimit Objects on Loan (0040)

Personnel No Name

EEGroup SPA Employees PersA Cultural Resources

EESubgroup FT N-FLSAOT Perm Statu

 Choose To STy. Delimit.Date

Overview


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

35. Highlight and click the **01/01/2008** row.

36. Click the **Delimit (Shift+F1)**  button

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

Copy Planned Working Time (0007)

 Work schedule

Personnel No Name

EEGroup SPA Employees PersA Natural and Cultural Resources

EESubgroup FT N-FLSAOT Perm Statu

Start To Chg.

Work schedule rule

Work schedule rule MTWHF-8,SaS-O

Time Mgmt status

Working week

Part-time employee

Working time

Employment percent	<input type="text" value="100.00"/>
Daily working hours	<input type="text" value="8.00"/>
Weekly working hours	<input type="text" value="40.00"/>
Monthly working hrs	<input type="text" value="173.33"/>
Annual working hours	<input type="text" value="2080.00"/>
Weekly workdays	<input type="text" value="0.00"/>

Additional fields

Telework Eligible

37. Update the following fields:

Field Name	Description	Values
Work Schedule Rule	A pattern of scheduled workdays and scheduled non-workdays.	Enter Work schedule rule Example: D01N08GN *Only DOT employees can stay on a flex schedule while on LOA
Time Mgmt status	Used in Time Evaluation processing	Enter value Example: Positive Time Recording

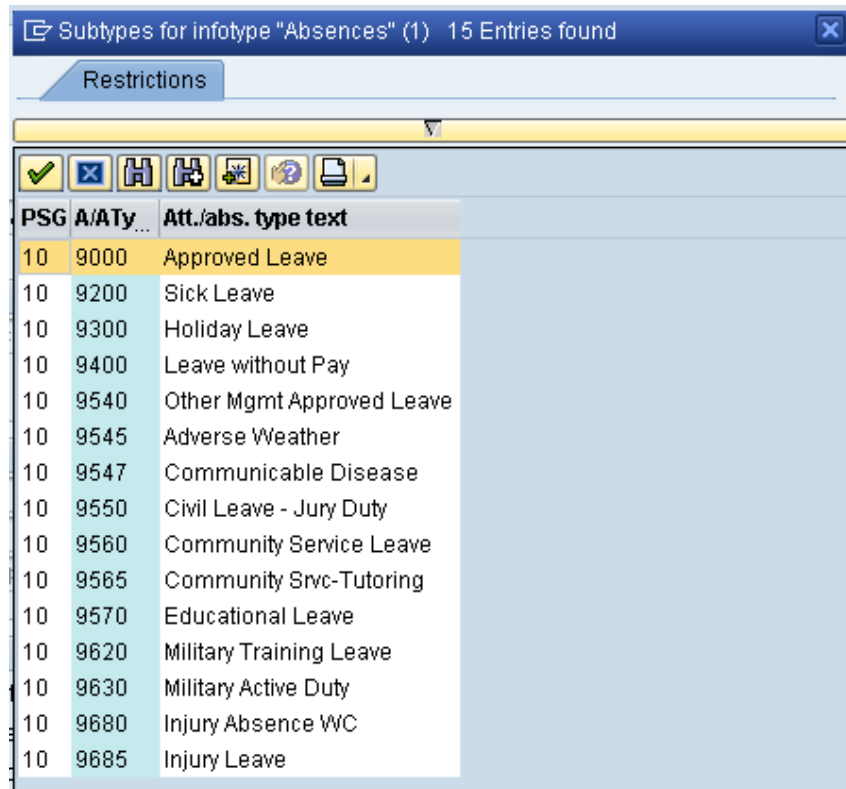
All full-time employees **must** be on a 5-day 8 hour per day work schedule (exception: DOT employees). The easiest way to accomplish this is to use **D01N08GN**. **All employees, whether full-time or part-time, must be positive time recording.**

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

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

38. Click the **Enter**  button.

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



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

41. Click the **Enter**  button.

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

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

Create Absences (2001)

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

Personnel No: 80000610 | Name: Susan Castro
 EE group: A SPA Employees | Personnel ar: 4601 | Cultural Resources
 WS rule: 001N086N MTWHF-8,SaS-O | Status: Active
 Start: 08/04/2011 | To: 08/31/2011

Absence

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

Advance payment

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


42. Update the following field:

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

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

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

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




Information



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


NOTE: An agency can make an agency-wide (not individual user) decision that LOA leave can be entered either 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 the Integrated HR-Payroll System is integrated, if the hours are entered on the Absences infotype 2001, they are processed during the next time evaluation. **Do not enter Time via CATs.**

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



Information

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

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



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

46. Click the **Enter**  button.
 Choose the appropriate type of leave to be paid out.

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

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

Create Time Quota Compensation (0416)

Compensate

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

Compensation specifications

Time quota type Vacation Leave

Compensation rule

No. to compensate

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

47. Update the following field:

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

48. Click the **Enter** button.

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

NOTES:

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

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

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

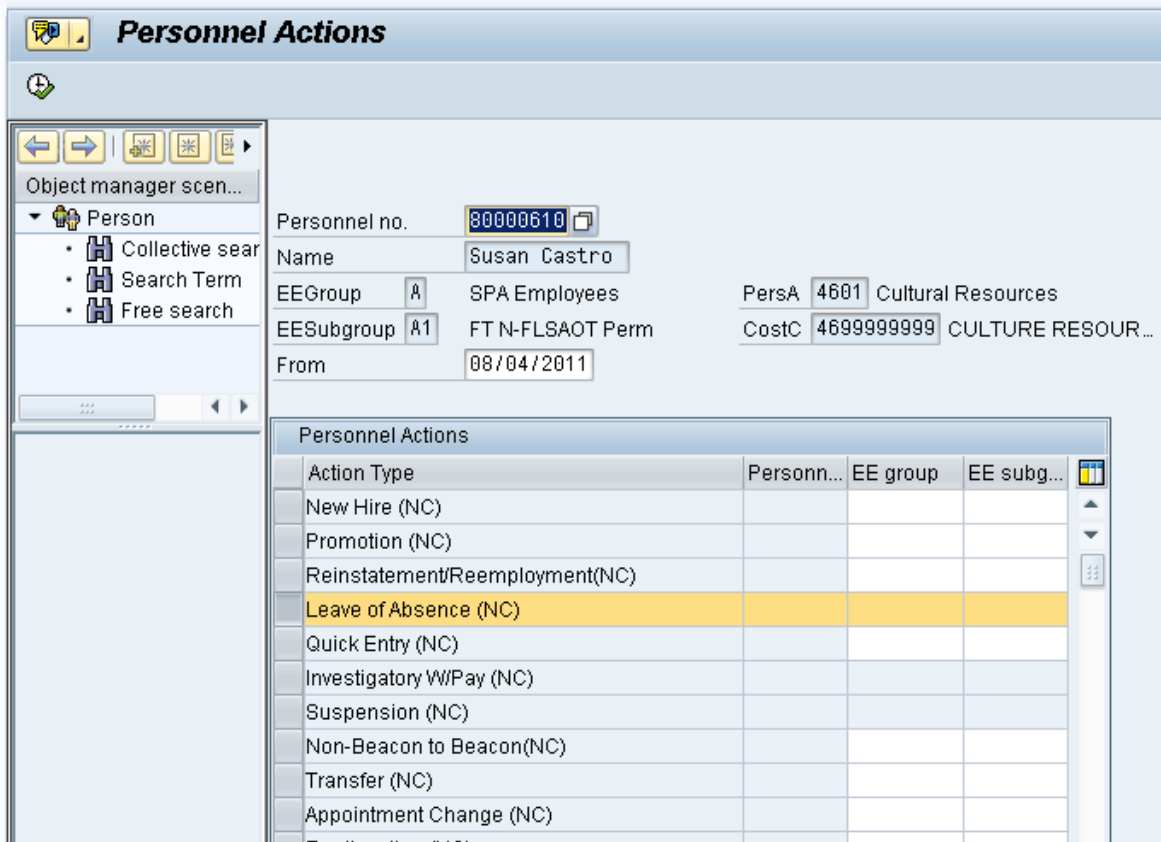
CRITICAL!

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

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

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

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

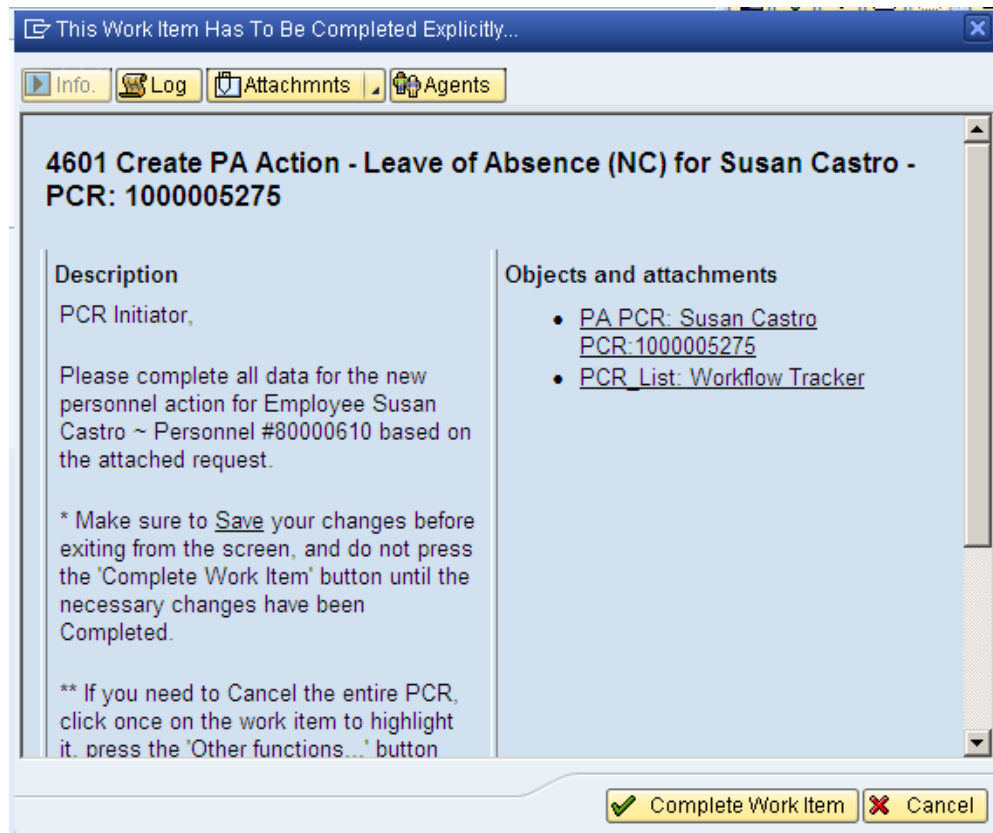


Personnel Actions

Personnel no. 80000610
 Name Susan Castro
 EEGroup A SPA Employees PersA 4601 Cultural Resources
 EESubgroup A1 FT N-FLSAOT Perm CostC 469999999 CULTURE RESOUR...
 From 08/04/2011

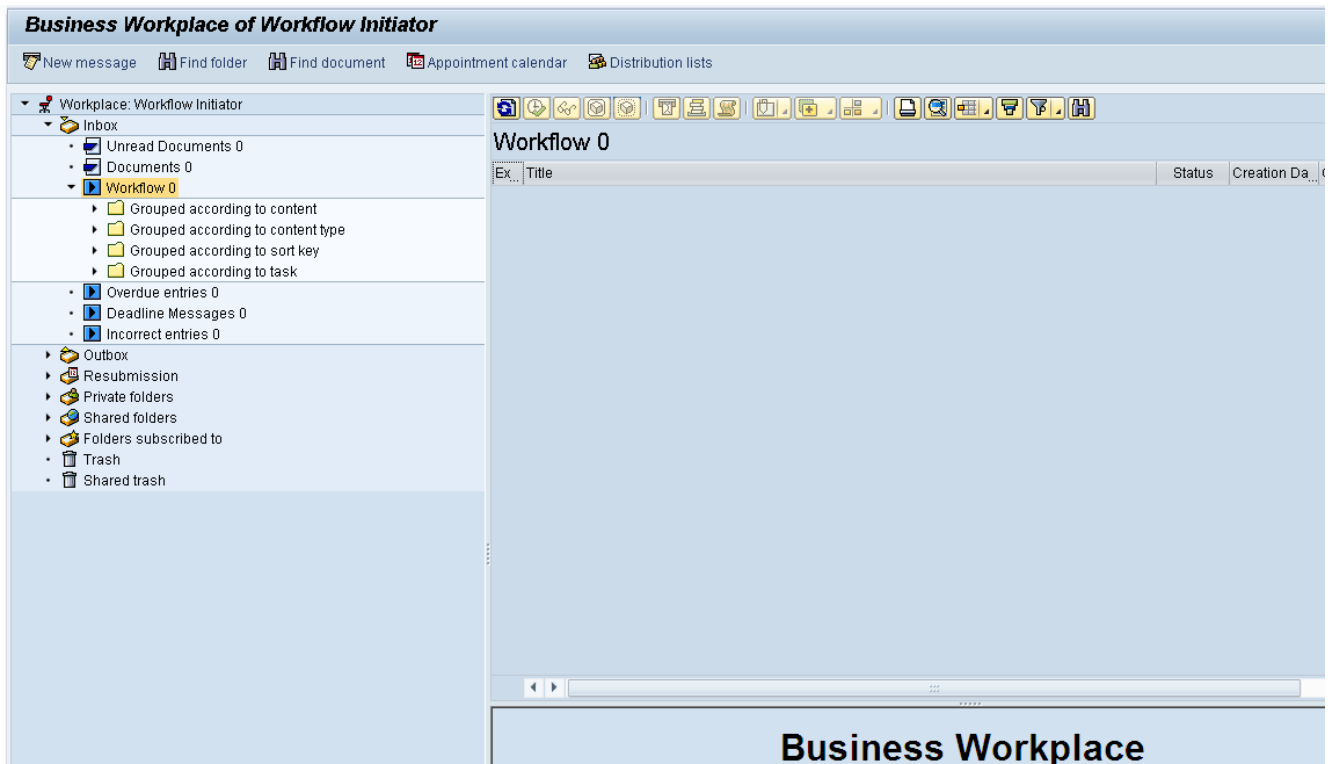
Action Type	Personn...	EE group	EE subg...
New Hire (NC)			
Promotion (NC)			
Reinstatement/Reemployment(NC)			
Leave of Absence (NC)			
Quick Entry (NC)			
Investigatory WWPay (NC)			
Suspension (NC)			
Non-Beacon to Beacon(NC)			
Transfer (NC)			
Appointment Change (NC)			

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



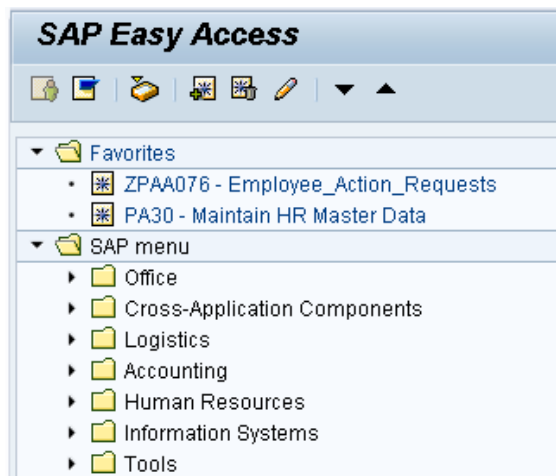
52. Click the **Complete Work Item**  button.

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



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

You can remain in this SAP Business Workplace and process additional PCRs, or click the Back to return to the main SAP Easy Access screen.



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

Short-Term Disability Payment Process

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

Process

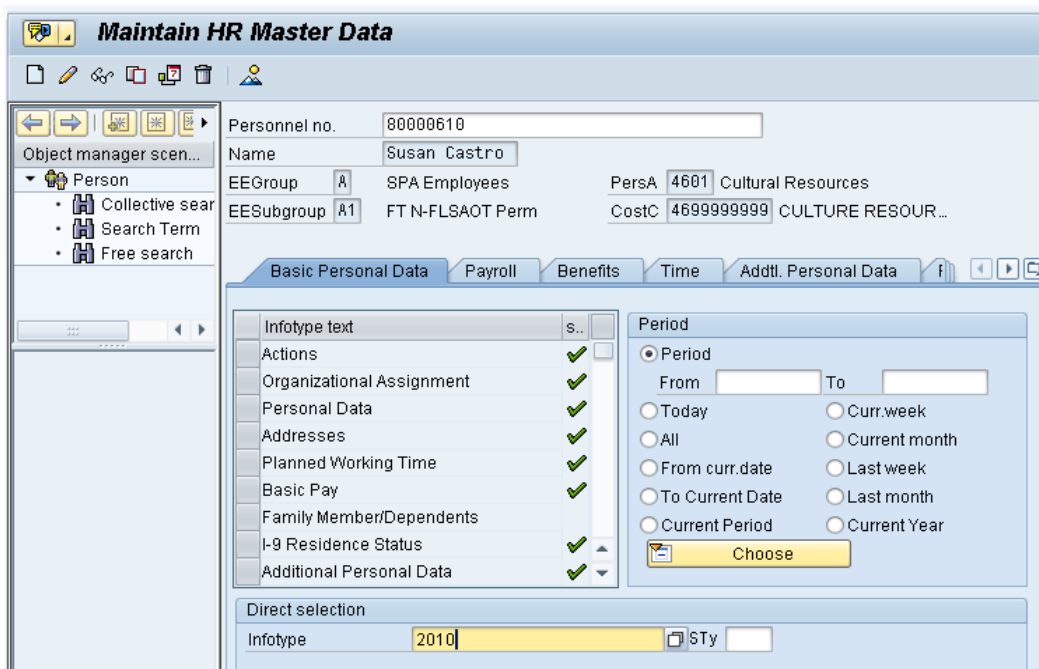
- STD Specialist completes Forms 714 and 711
- Doctor completes Form 703
- Employee returns Form 703 to STD Specialist every 30 days. Exception: Approved DIP-7
- STD Specialist processes (STD payment) via PA30, creating an IT2010.
- The IT2010 is created when Form 703 is received.

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

Access Transaction:


Via Transaction Code: PA30

Procedure



55. Enter **Infotype 2010**.

56. Click the **Create**  button.

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

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

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

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

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

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

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

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

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

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

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

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

Create Employee Remuneration Info (2010)

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

Personnel No: 80000610 | Name: Susan Castro
 EE group: A SPA Employees | Personnel ar: 4601 | Cultural Resources
 WWS rule: D01N0086N MTWHF-8,SaS-O | Status: Active
 Date: 08/04/2011

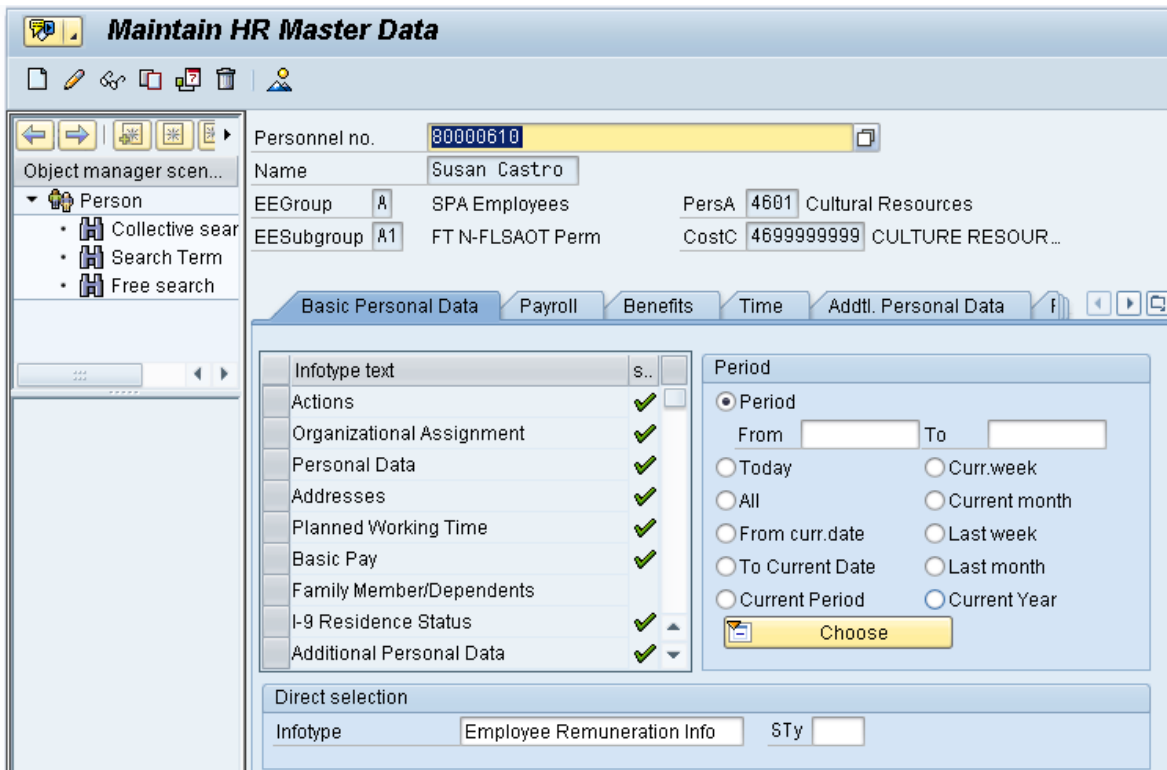
Remuneration info


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

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

Note: Click **Edit, >> Maintain text** to add a comment stating how much the employee is to be paid.

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



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

Additional Resources

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

Change Record

Change Date: 2/5/21 (B. Johnson)
 Changes: Infotype 0007

Change Date: 3/31/22 (C. MacDonald)
 Changes: Removed Date Monitoring Report (S_PHO_48000450), replaced it with BOBJ Report – B0099 – Employee Deadline Dates