REINSTATEMENT ACTION FROM LOA WORKERS' COMP

PER-77 | TRANSACTIONS ZPAA076, PA40

PA

The purpose of this Business Process Procedure is to explain how to process a Reinstatement/Reemployment from Workers' Comp in the Integrated HR-Payroll System.

Trigger: There is a need to process a Reinstatement/Reemployment from Workers' Comp for one of the reasons listed in the Business Process Procedure Overview section.

Business Process Procedure Overview: (For Reinstatement/Reemployment from WC LOA only)

12 - Return from Workers' Comp w/Physician Restrictions that state a Modified Duty of 20-40 hrs - Employee has been released by the treating physician to return to a modified duty assignment with a work schedule of 20 or more hours a week. Employee has not reached maximum medical improvement (MMI).

13 - Return from Workers' Comp with MMI Complete – Employee has reached maximum medical improvement (MMI) and has been released by the treating physician to return to permanent work in the same position or one of seniority, status, and pay held prior to WC leave.

22 - Return from Workers' Comp with MMI Disability – Employee has reached maximum medical improvement (MMI) and has been released by the treating physician to return to work but has a disability which prohibits employment in the same capacity that existed prior to WC leave. Agency work placement has identified and placed employee in another position suitable for employee and agency.

23 - Rtn from Workers' Comp w/Physician Restrictions that state a Modified Duty less than 20 hrs - Employee has been released by the treating physician to return to a modified duty assignment with a work schedule of less than 20 hours a week. Employee has not reached maximum medical improvement (MMI).

NOTE: Follow the steps below for the four reasons above. You will find additional instructions at the end of this document to assist in reviewing or adjusting other infotypes as needed.

> Employees returning from WC Salary Continuation Pay must be brought back in the same capacity as they left. (EE Subgroup and Work Schedule Rule)

- If employee is returning part-time, use the following codes on timesheet.
  - 9500 Time Worked
  - 9685 Injury Leave

NOTE: You **will not** create an Appointment Change Action for employees returning from WC Salary Continuation Pay or WC Continuation Pay for Teachers Only.

Tips and Tricks: Prior to initiating any workflow, ensure the data being used is valid and appropriate. For example, if working with a Reinstatement/Reemployment action, ensure the individual is currently listed as out on LOA.

Access Transaction:

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

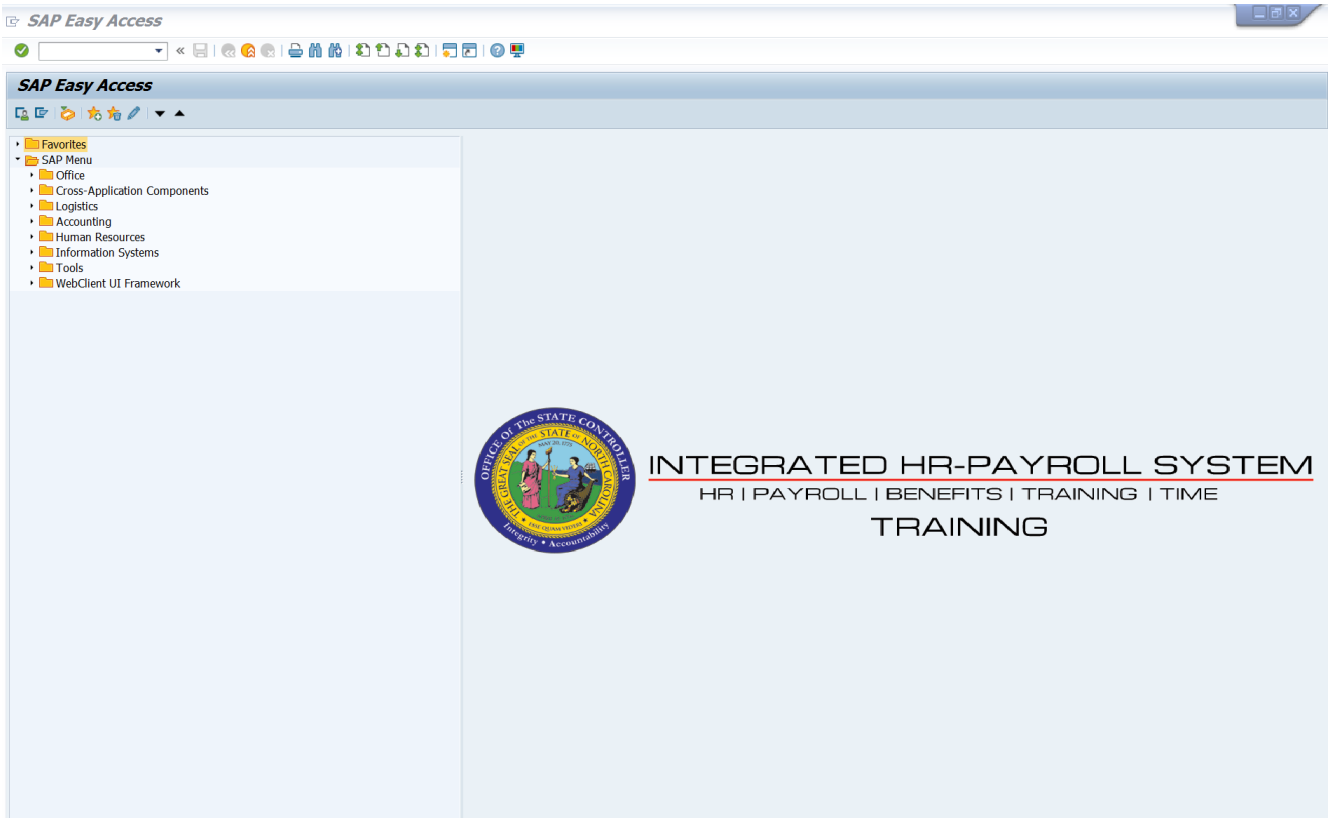
Via Transaction Code: ZPAA076; PA40

NOTE: This BPP starts with completing the Action. If you need assistance with creating the workflow, see *Reinstatement/Reemployment Action from LOA Action*.

Procedure

1. The Initiate Reinstatement/Reemployment Action is complete.

   After Workflow Approvals have been received, proceed with the Complete Reinstatement/Reemployment Action process.



2. 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

3. Click the **Enter** button.

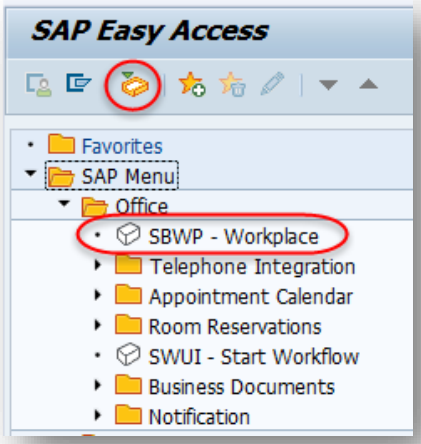
Information

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

- From the menu at the top of the screen, choose **Favorites > Insert Transaction**.
- Type in **ZPAA076**.
- Click **Enter**.

To see the transaction code displayed in front of the link in your favorites, from the menu at the top of the screen:

- Choose **Extras > Settings**.
- Place a check next to **Display Technical Names**.
- Click **Enter**.

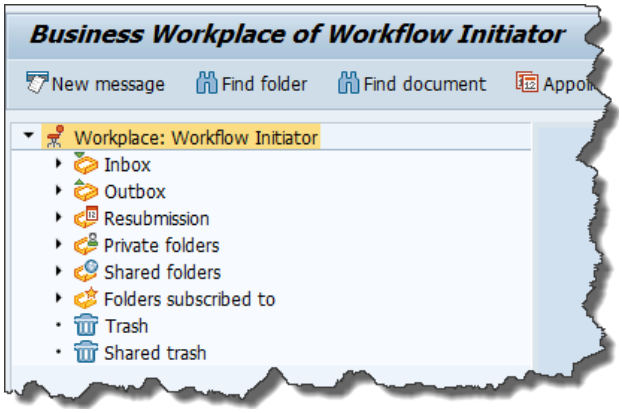


4. Click the **SAP Business Workplace (Ctrl+F12)** button.

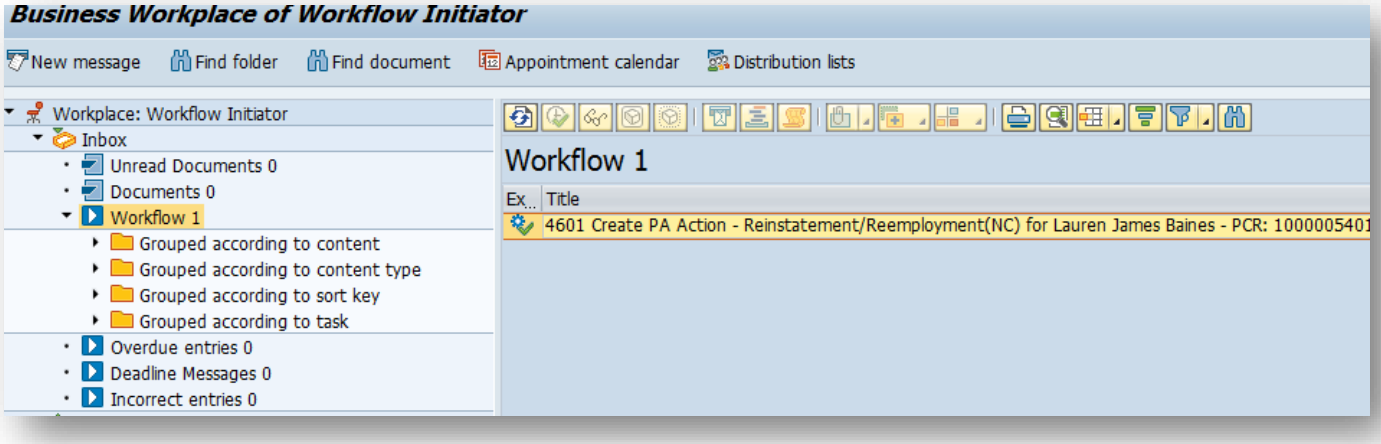
These instructions assume you have initiated the Leave of Absence Personnel Change Request (PCR) in workflow, and you have an approved PCR ready to be processed as a Leave of Absence in the system.

Information

Option: Also, you can click the button for the SAP Business Workplace inbox. It is located just above the SAP Easy Access Favorites folders as depicted in the screen capture above.



5. Select **Inbox >> Workflow**.



6. Single-click to select the **PCR** 4601 Create PA Action - Reinstatement/Reemployment(NC) for Lauren James Baines - PCR: 1000005401 row.

7. **Information**	Be sure to copy your PCR notes at this point so you can paste them on the Actions infotype when you begin the infotype creation process.

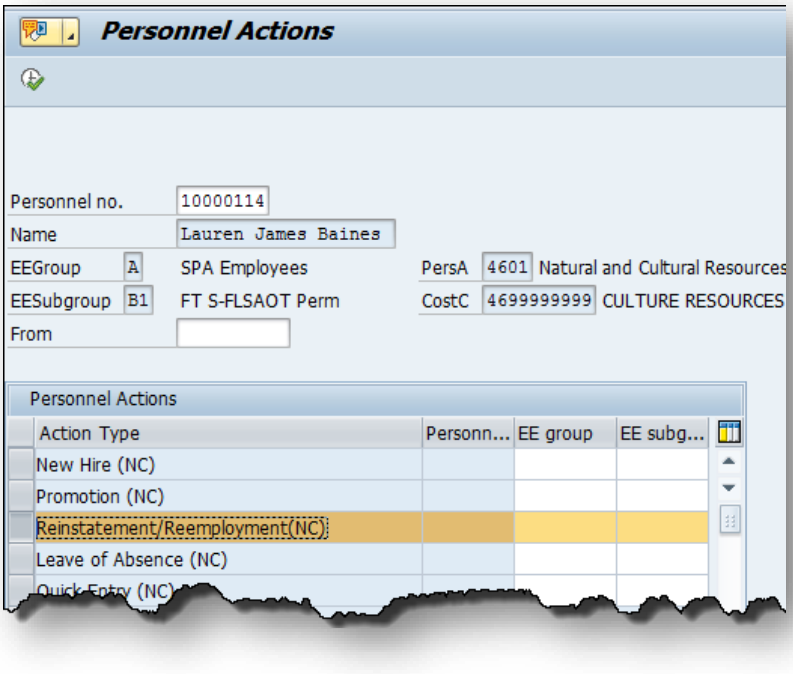
8. After you have copied the PCR notes, use one of the following methods to execute the PCR.

   - Double-click on the PCR row.

     - - OR - -

   - 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 Reinstatement/Reemployment Action will be launched.



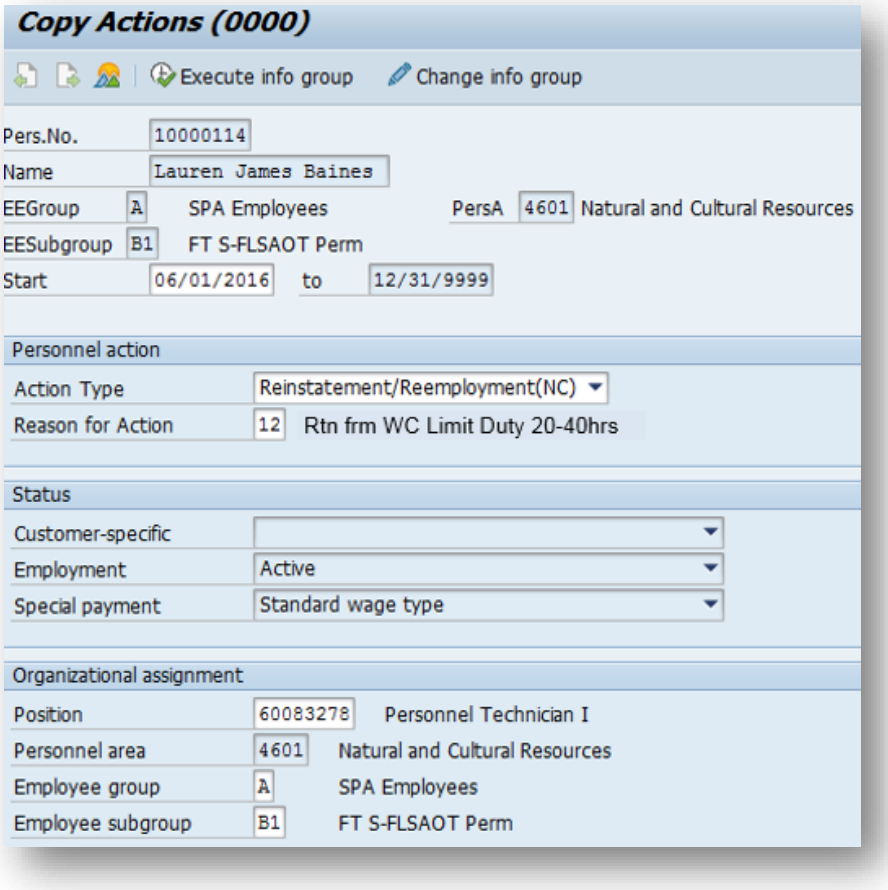
9. Update the following field:

10. Field Name	**Description**	**Values**
From	Effective date of the personnel action	Enter value in From. **Example**: 06/01/2016

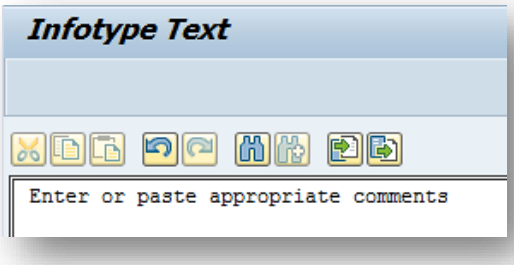
11. Highlight the Reinstatement/Reemployment (NC) action type.

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

    The effective date is the date the Reinstatement/Reemployment will go into effect. The date **must** match the effective date approved on the PCR.



13. 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.

14. Click the **Enter** button.

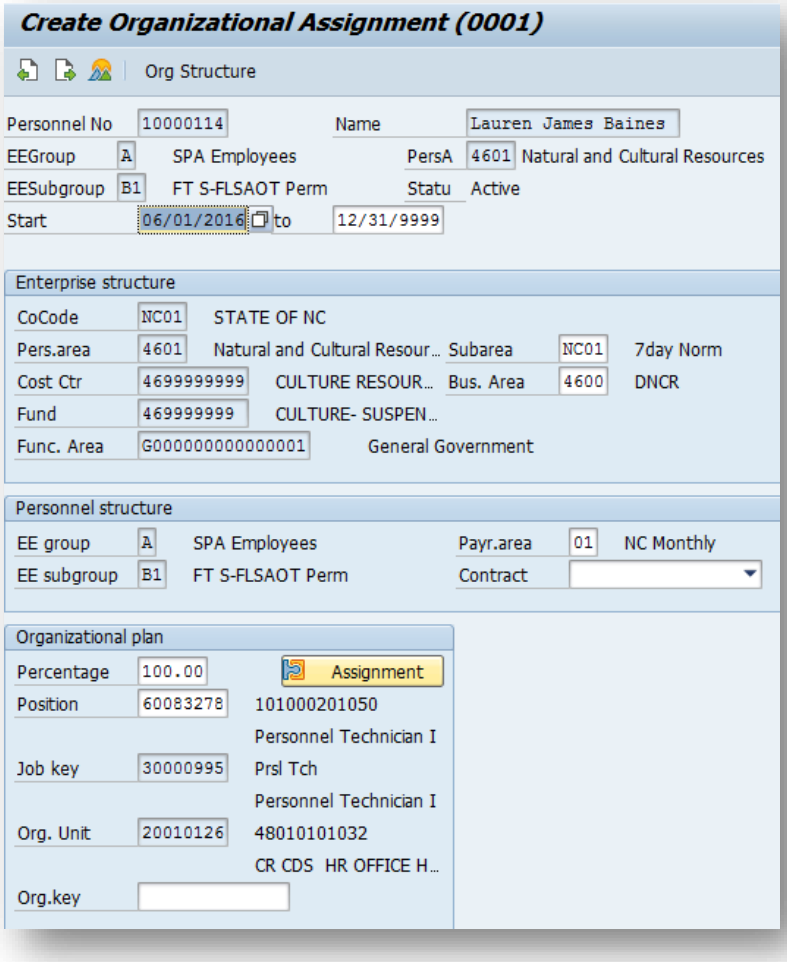
The system will provide a yellow warning message informing you the existing record will be delimited. Click Enter to go past this warning message.

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.

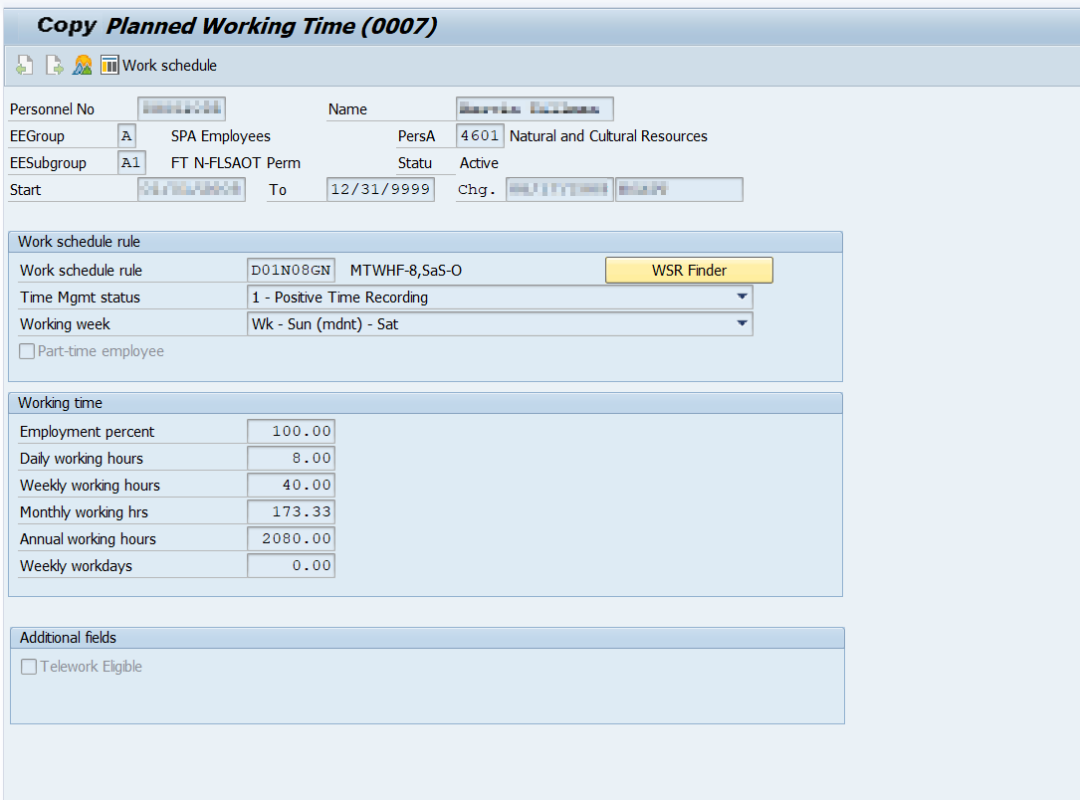
When the employee subgroup is different from the position employee subgroup you will receive a warning message. Click **Enter** to continue.

BEST PRACTICE: Review all data and click Enter to allow the system to validate the data.

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



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

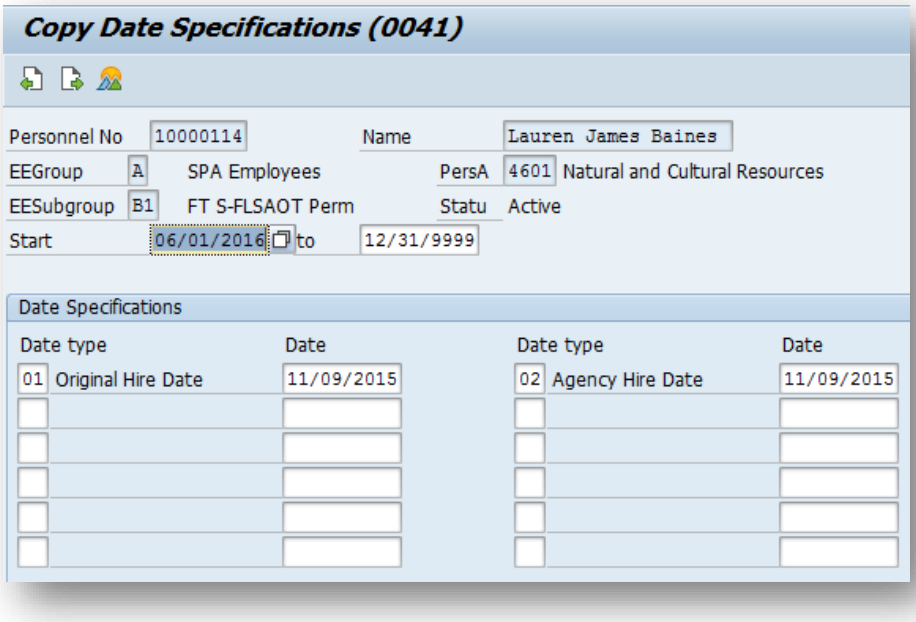


When an employee is returning from a WC LOA, they should be reinstated in the same capacity as they left (same work schedule rule). If their working hours need to be changed (FT to PT), an Appointment change action will need to be entered with the same effective date.

BEST BUSINESS PRACTICE: Change the work schedule rule back to what it was before the employee went on LOA.

CRITICAL!	Subject employees must be positive time. Employment percent should always be 100.

19. Change the work schedule rule back to what it was before employee went on LOA.
20. Click the **Enter** button.
21. Click the **Save (Ctrl+S)** button.



22. Click the **Enter** button.

    Review the date specifications information and make changes as appropriate. Do **not** change Date Type *01 Original Hire Date*. Follow your Agency process for updating the *02 - Agency Hire Date*.

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

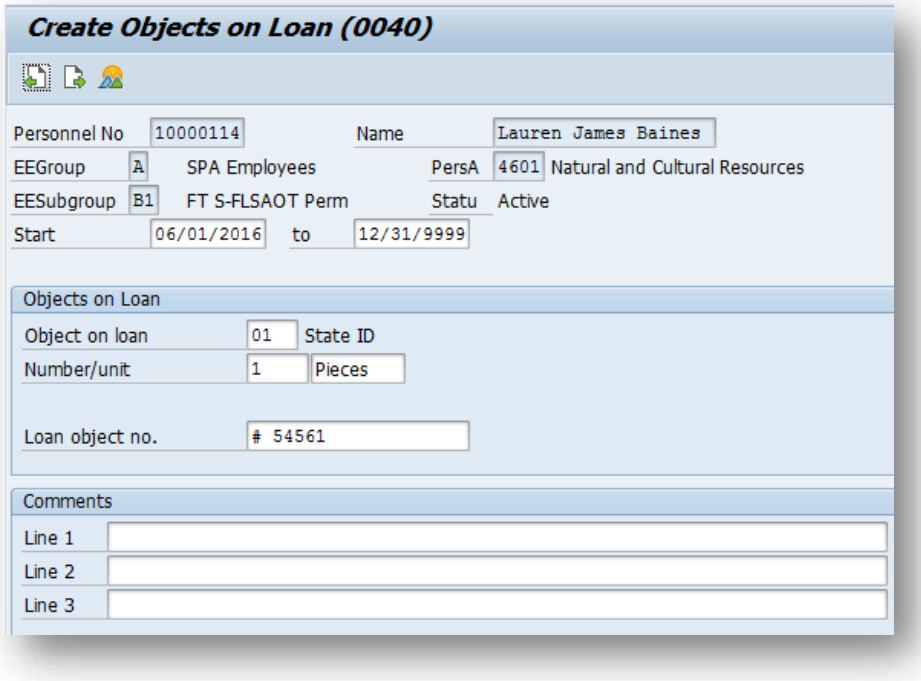
24. Click the **Enter** button.

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

    Agency representative will need to enter the following fields:

    - Related Work Experience
    - Related Education Months

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



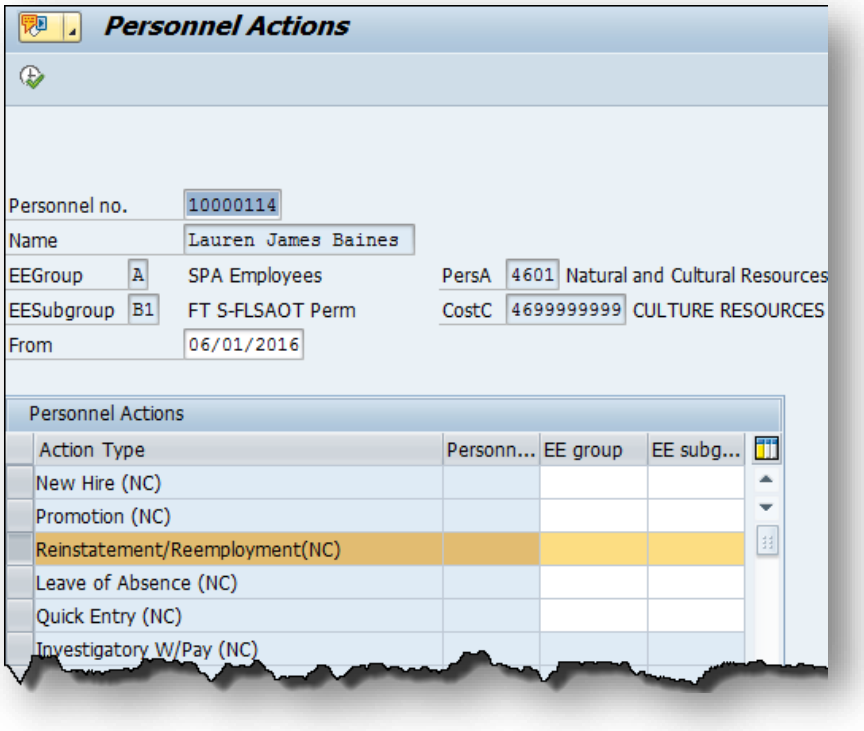
26. Click the **Enter** button.

    Verify the objects on loan that have been issued to the individual. When the individual went on leave, the various objects on loan may or may not have been delimited. Here you will reassign or add new ones.

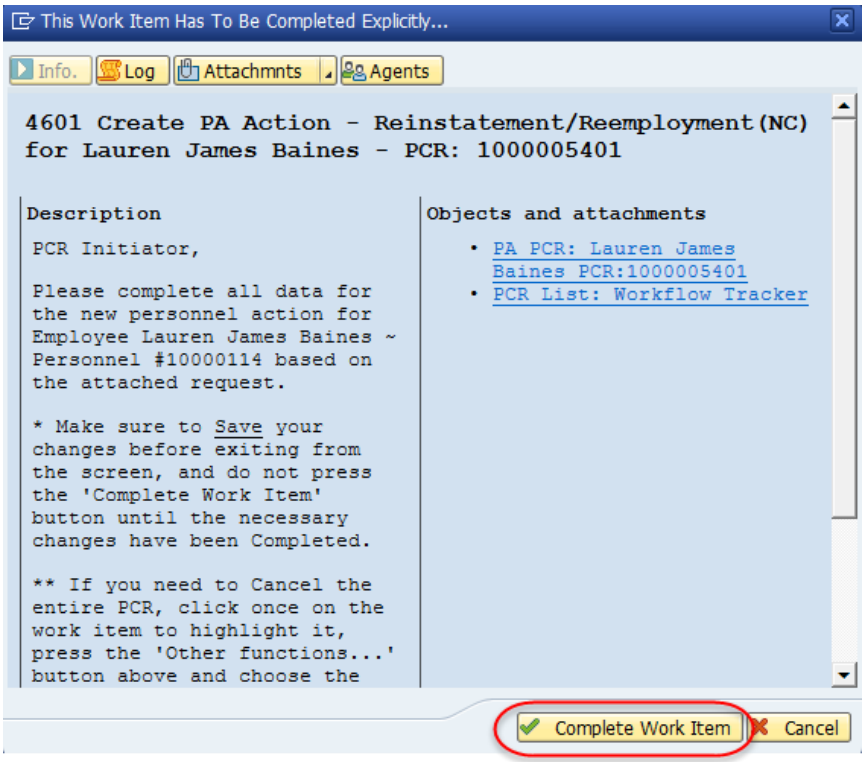
    Comments can be entered on lines 1, 2, and 3 if appropriate for your business policy.

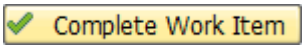
    NOTE: If the employee receives more than one item on loan, you will need to process a PA30 transaction in order to add the additional items to infotype 0040.

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



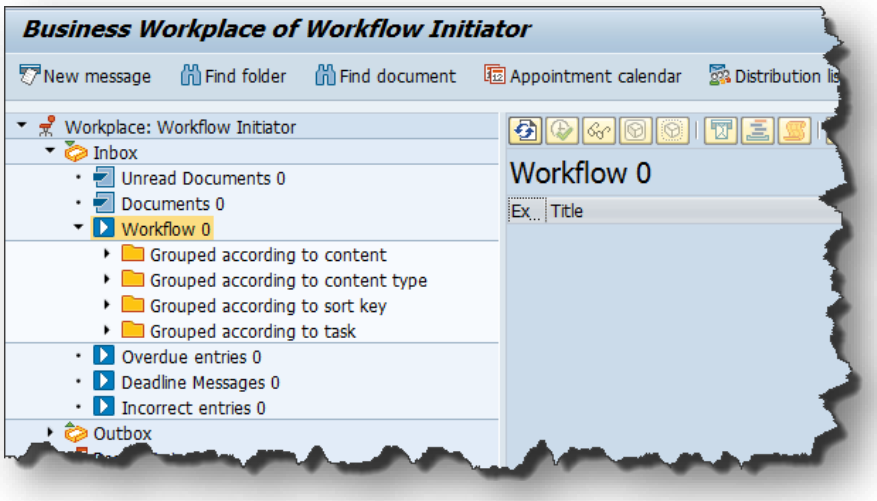
28. Click the **Back (F3)** button.



29. Click the **Complete Work Item** 

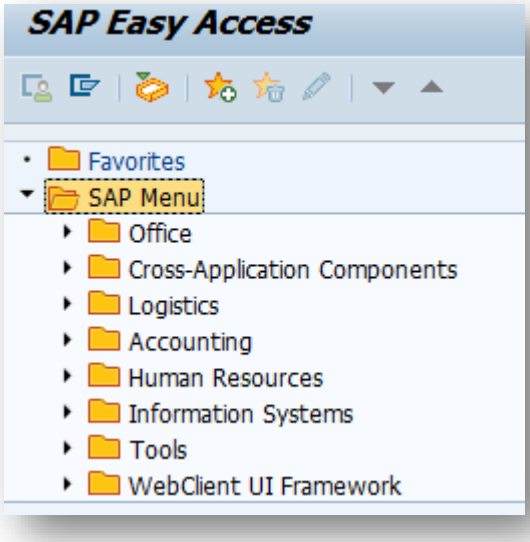
button.

    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.



30. 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.



The Reinstatement/Reemployment Action is complete, but we recommend reviewing via PA20 all infotypes that have been processed.

Information	Check the Leave balances to ensure that they are correct upon the Reinstatement/Reemployment Action.

Additional Processing Guidelines

NOTE: If less than 40 hours you must complete part 2.

12 - Return from Workers' Comp w/Physician Restrictions that state a Modified Duty of 20-40 hrs - Employee has been released by the treating physician to return to a modified duty assignment with a work schedule of 20 or more hours a week. Employee has not reached maximum medical improvement (MMI).

Part 1 - Z2 – Reinstatement/Employment Action

- IT0007 – Planned Working Time
  - Work Schedule Rule
  - Time Mgmt status
- Verify accuracy of leave accruals based on manual tracking spreadsheet.
  - Notify Leave Administrator if adjustments are required.
- Verify Holidays
  - Has a holiday been granted that may need to be removed?
  - Does an upcoming holiday need to be granted?

Part 2 – Z9 – Appointment Change Action (create with same effective date)

- IT0000 – Actions
  - Reason – Full Time to Part Time
  - EE Subgroup change to part-time
- IT0001 – Organizational Assignment
  - Percentage still remains 100%
- IT0007 – Planned Working Time
  - Work Schedule Rule to part-time
  - Time Mgmt status (subject employees must be positive time)
  - Check Part-time employee box
  - Employment percentage always 100% except for interfacing Agencies.

Note: Interface Agency should select interfacing WSR and enter the part-time weekly working hours.

- IT0008 – Basic Pay – – pro-rated to part-time rate – Annual Salary should be the amount you are ACTUALLY paying the employee. If 40 hours per week, employee was paid $80,000 and now employee is only working 20 hours per week, salary entered will be $40,000. You are paying 100% of $40,000. The part time approved work hours are paid out of the Integrated HR-Payroll System. The remaining workers' comp absence hours are paid by the Workers' Comp Third Party Provider or out of the Integrated HR-Payroll System from A/A 9685 for those employees still eligible for salary continuation.
- IT0041 – Date Specifications – copies previous record, follow Agency guidelines for updating Agency Hire Date
- Longevity – if employee is eligible, contact BEST Shared Services OPS Payroll to correct the employee's longevity amount to be paid at the full time base pay.
- Aggregate Service – must be monitored by the Agency and a ticket submitted to BEST Shared Services if an accrual rate change occurs.
  - **Note:** Upon the employee's return to work at full capacity, the Agency would need to calculate and update the aggregate service, or submit a ticket to BEST.
- Leave Accruals – pro-rated to part-time rate. (See Leave section earlier in this BPP.)
  - **Note:** Upon the employee's return to work at full capacity or upon separation, the Agency will need to calculate and update the leave accrual balances or submit a ticket to BEST.
- Health Insurance Benefits – Agency will need to submit a ticket to BEST Shared Services to ensure the continuation of health insurance benefits as a full time employee.
- Upon the employee's return to work at full capacity, the Agency will need to initiate an appointment change personnel action to change the employee back to full time status.

13 - Return from Workers' Comp with MMI Complete – Employee has reached maximum medical improvement (MMI) and has been released by the treating physician to return to permanent work in the same position or one of seniority, status, and pay held prior to WC leave.

Z2 – Reinstatement/Employment Action

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22 - Return from Workers' Comp with MMI Disability – Employee has reached maximum medical improvement (MMI) and has been released by the treating physician to return to work, but has a disability which prohibits employment in the same capacity that existed prior to WC leave. Agency work placement has identified and placed employee in another position suitable for employee and agency.

Z2 – Reinstatement/Employment Action

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  - Work Schedule Rule
  - Time Mgmt status
- Verify accuracy of leave accruals based on manual tracking spreadsheet.
  - Notify Leave Administrator if adjustments are required.
- Verify Holidays
  - Has a holiday been granted that may need to be removed?
  - Does an upcoming holiday need to be granted?

23 - Rtn from Workers' Comp w/Physician Restrictions that state a Modified Duty less than 20 hrs - Employee has been released by the treating physician to return to a modified duty assignment with a work schedule of less than 20 hours a week. Employee has not reached maximum medical improvement (MMI).

Part 1 - Z2 – Reinstatement/Employment Action

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  - Work Schedule Rule
  - Time Mgmt status
- Verify accuracy of leave accruals based on manual tracking spreadsheet.
  - Notify Leave Administrator if are required.
- Verify Holidays
  - Has a holiday been granted that may need to be removed?
  - Does an upcoming holiday need to be granted?

Part 2 – Z9 – Appointment Change Action (create with same effective date)

- IT0000 – Actions
  - Reason – Full Time to Part Time
  - EE Subgroup change to part-time
- IT0001 – Organizational Assignment
  - Percentage still remains 100%

- IT0007 – Planned Working Time
  - Work Schedule Rule to part-time
  - Time Mgmt status (subject employees must be positive time)
  - Check Part-time employee box
  - Employment percentage always 100% except for interfacing Agencies.

NOTE: Interface Agency should select interfacing WSR and enter the part-time weekly working hours.

- IT0008 – Basic Pay – pro-rated to part-time rate – Annual Salary should be the amount you are ACTUALLY paying the employee. If a 40 hours per week, employee was paid $80,000 and now employee is only working 20 hours per week, salary entered will be $40,000. You are paying 100% of $40,000. The part time approved work hours are paid out of the Integrated HR-Payroll System. The remaining workers' comp absence hours are paid by the Workers' Comp Third Party Provider or out of Integrated HR-Payroll System from A/A 9685 for those employees still eligible for salary continuation.
- IT0041 – Date Specifications – copies previous record, follow Agency guidelines for updating Agency Hire Date
- Longevity – if employee is eligible, contact BEST Shared Services OPS Payroll to correct the employee's longevity amount to be paid at the full time base pay.
- Aggregate Service – must be monitored by the Agency and a ticket submitted to BEST Shared Services if an accrual rate change occurs.
  - **NOTE:** Upon the employee's return to work at full capacity, the Agency would need to calculate and update the aggregate service, or submit a ticket to BEST.
- Leave Accruals – pro-rated to part-time rate. (See Leave section below.)
  - **NOTE:** Upon the employee's return to work at full capacity or upon separation, the Agency will need to calculate and update the leave accrual balances or submit a ticket to BEST.
- Health Insurance Benefits – Agency will need to submit a ticket to BEST Shared Services to ensure the continuation of health insurance benefits as a full time employee.
- Upon the employee's return to work at full capacity, the Agency will need to initiate an appointment change personnel action to change the employee back to full time status.

Leave *(if returning part-time)*

- Employee will continue to accrue pro-rated leave while receiving WC benefit.
- Employee is entitled to use only the leave they actually earn during the time they work.
- Agency will continue to manually maintain accruals until the employee has **been released by the treating physician and returns to permanent status**. This leave must be kept manually. **The Integrated HR-Payroll System will not calculate this leave automatically while the employee is working a part-time schedule**. See worksheet below:

Example:

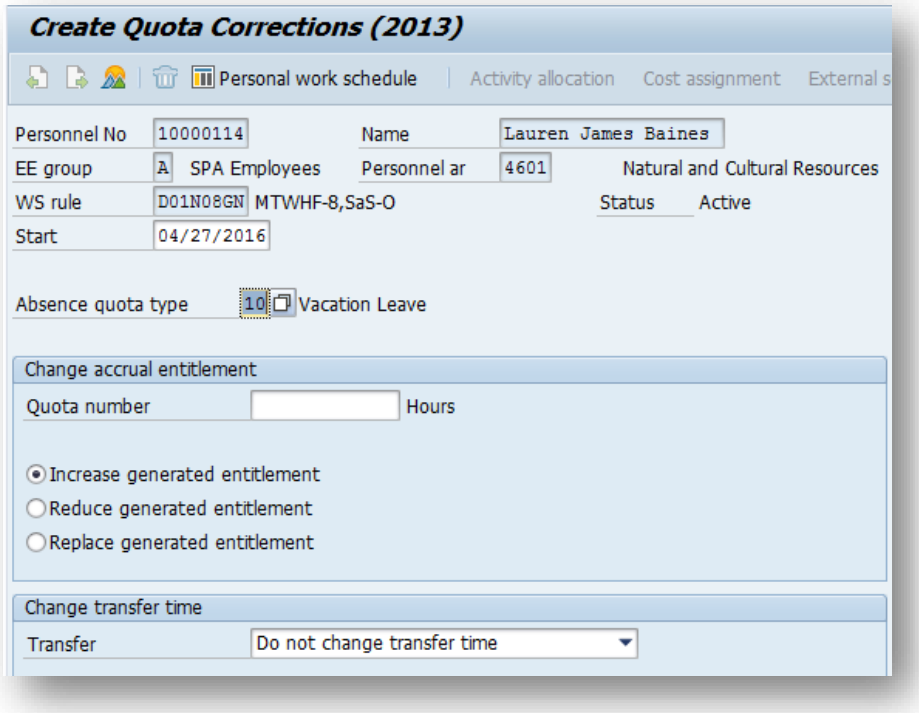
Scenario – returning part-time from WC

- Earn pro-rated leave based on the number of hours worked
  - 20 hours = 4 hrs of sick leave accrual = *4 hrs additional for WC
  - 30 hours = 6 hrs of sick leave accrual = *2 hrs additional for WC

*The additional hours need to be maintained manually and cannot be used until the employee **has been released by the treating physician** and returns to permanent status.

Quota Corrections (2013)

A valid discrepancy has been found in an employee's quota based on manual spreadsheet maintained while employee was out. Upon management approval, the quota should be adjusted as necessary.



Only the *From Date* is used on IT2013 records. This value also can be entered once the infotype record screen is displayed.

Only one IT2013 record should be created for each subtype for the same *From date*. Multiple records can cause Time Evaluation to error out for the employee.

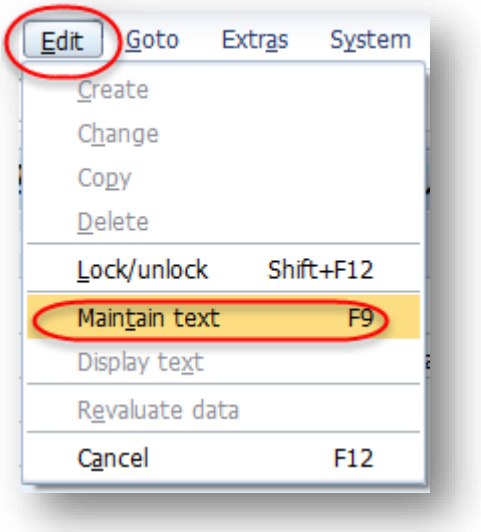
Enter the subtype corresponding to the quota for adjustment. Select the *STy* field matchcode to view a list of available quotas.

Transfer Field Options		
Increase generated entitlement	Indicates that hours should be added to quota (default option)	This option adds the hours specified to the employee's existing quota or creates the quota with the specified hours if the employee does not have a current balance for the selected quota.
Decrease generated entitlement	Indicates that hours should be subtracted from quota	This option subtracts the hours specified from the employee's existing quota.
Replace generated entitlement	**DO NOT SELECT THIS OPTION!**	**DO NOT USE THIS OPTION!** This option was intended to replace the employee's quota accrual generated in Time Evaluation on the From Date. The Integrated HR-Payroll System staff advises against trying to use this option.

The Quota Correction record will be processed during the nightly Time Evaluation process. The adjusted quota should then be reflected in the employee's quota balances the following day. To verify the adjustment processed correctly, access Quota Overview (transaction PT50) and view the employee's quota balances as detailed in PT50 transaction. For more detailed instructions for transaction PT50, refer to the BPP instructions: PT50 - Quota Overview.

Always add comment to justify why you entered a change.

On the toolbar at the top of the screen, click **Edit > Maintain** text.



Additional Resources

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

Change Record

Change Date: 2/5/2021 (B. Johnson)
Changes: Infotype 0007