

# LEAVE ACCRUAL AND REPORTING

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## **OVERVIEW**

Developed with OSPA, the Leave Accrual and Reporting System (LARS) accrues and tracks employee leave balances for more than 25 leave types. Leave balances are employee, agency and concurrent job specific.

LARS tracks both accrued and non-accrued leave. Accrued (accumulating over time) leave includes compensatory time (CT), furlough obligation (LA), personal business (PB), sick (SL), straight time (ST), vacation (VA) and excess vacation (VF). They generally have a positive balance (hours accrued minus hours used).

LARS tracks other leave types as hours used. They normally have a negative balance.

Generally, the leave accrual process runs one day after each final payroll run 2 (see the OSPS Processing Calendar for specific dates). During the process, LARS posts the following leave transactions:

- Entries made on the following OSPA screens since the last leave accrual:
  - P003 and P004 Time Capture
  - P050 Gross Pay Adjustments on File
  - P435 Employee Leave Data
- Sick and vacation leave accruals for all eligible employees
- Personal business for eligible new employees and transfers
- Furlough obligation for eligible new employees

In addition, in specific months, it may do the following:

- Reduce the employee's balance of vacation or compensatory time because the employee has exceeded the maximum allowed
- Adjust designated non-accrued leave balances to zero
- Reduce any existing personal business leave to zero and establish a new leave balance for the new fiscal year

The separation between LARS and OSPA is primarily seamless to the user:

- You can access the LARS screens through OSPA
- For most transactions in OSPA, the application checks the LARS tables to ensure the employee has accrued leave
- Entries saved in OSPA immediately update the P430 and P435 Employee Leave Data screens
- The monthly LARS leave accrual is available the next day in OSPA

See Notes below for additional information.

## **RESPONSIBILITIES**

### **APPLIES TO**

All agencies that use OSPA and have employees who are eligible for leave.

## ORGANIZATIONAL UNITS

The following organizational units play a role in the accrual and use of leave:

Entity	Responsibility
Employee	<ul style="list-style-type: none"> <li>Records time worked and leave taken</li> </ul>
Employee's Manager	<ul style="list-style-type: none"> <li>Approves leave requests and monitor's employee's leave balances through the B470CM Leave Accrual Register</li> <li>Reviews and approves employee's reported time</li> <li>Notifies agency Human Resources and Payroll of changes in work schedule, including LWOP</li> </ul>
Agency Human Resources	<ul style="list-style-type: none"> <li>Enters LWOP and employment changes in the PPDB</li> </ul>
Agency Payroll	<ul style="list-style-type: none"> <li>Enters employee time from paper timesheets on the P003 Time Capture screen</li> <li>Makes manual adjustments to leave on the P435 Employee Leave Data screen</li> <li>Pays off leave balances on the P050 Gross Pay Adjustments on File screen</li> <li>Monitors LARS reports for necessary actions</li> </ul>
Oregon Statewide Payroll Services (OSPS), State Controller's Division (SCD), Department of Administrative Services (DAS), <a href="mailto:OSPS.Help@state.or.us">OSPS.Help@state.or.us</a>	<ul style="list-style-type: none"> <li>Enters pay and leave codes with the ADB1 and ADB2 Payroll Benefit Package Table screens</li> <li>Scrubs PIN's for employees who use On-line Daily Time (ODT)</li> </ul>

## SYSTEMS

The following computer applications play a role in the accrual, use and monitoring of leave:

System / Application	Functionality
Position and Personnel Database (the PPDB)	<ul style="list-style-type: none"> <li>Maintains employee history</li> <li>Sends data to OSPA when saved</li> </ul>
Oregon Statewide Payroll Application (OSPA)	<ul style="list-style-type: none"> <li>Edits against leave balances in LARS and updates LARS leave balances when employee takes leave</li> </ul>
Leave Accrual and Reporting System (LARS)	<ul style="list-style-type: none"> <li>Accrues and maintains leave balances for each employee, agency and concurrent job</li> </ul>

## **RECOMMENDED PRACTICE, PAYROLL**

### **PREREQUISITES**

Intentionally left blank

### **PRACTICE**

Intentionally left blank

Action	More

## **ENTRIES**

This section includes the following guides for making leave related entries:

- Add a New Leave Type
- Adjust Leave Hours
- Advance Leave
- Change an Existing Entry on the P435
- Delete an Existing Entry on the P435
- Pay-off Leave
- Restore Lost Leave
- Transfer Leave from one CCJ to another CCJ
- Transfer Leave to and from the Clearing Account

### **ADD A NEW LEAVE TYPE**

There are rare instances where you need to add a leave type to the employee's leave record; examples include:

- The employee earned comp time in an archived pay period. It was not entered on the P004 or P003 Time Capture screen. The employee wants to use the comp time.
- The employee transferred to your agency. The sending agency did not transfer the employee's leave to the clearing account. See the OSPA Reference Manual, Recommended Practices, Transfers.
- The employee received donated hardship leave, see the OSPA Reference Manual, Handbooks, Donated Hardship Leave

Action	More
<p>1. The P430 Employee Leave Data screen displays the employee's leave balances.</p> <ul style="list-style-type: none"> <li>▪ In the top left corner of any screen, type P430 SSN or employee ID (P430 OR#####)</li> <li>▪ Press [ENTER]</li> </ul>	<p>It will default to your sign-on agency and CCJ #1. You can change the CCJ.</p>
<pre> P430  OR#####  #####  EMPLOYEE LEAVE DATA       LASTNAME FIRSTNAME  LV09 ENTER NEXT KEY  RECOGNIZED SERVICE DATE: 091807  DATA IN LEAVE CLEARING ACCOUNT: N  J SVC LV USE ACCR ACCR  MAX  MAX  MAX  ACCRUAL  REMAIN  TIME  LAST B CD  TP WAIT MO  RATE  ACCR  USE  MO  BAL  ADV  LOST  ACTV 1 1  *F  00  00  .00  .0  .0  00  FWD  4452.00  513.00  1646.00  093009 LV BAL DT CUR/CONT 093009/093007  CUR  4452.00  513.00  1646.00  1 1  *T  00  00  .00  .0  .0  00  FWD  1212.00  .00  .00  063008 LV BAL DT CUR/CONT 093009/022807  CUR  1212.00  .00  .00  1 1  FL  00  00  .00  .0  72.0  06  FWD  16.00-  .00  .00  073109 LV BAL DT CUR/CONT 093009/073109  CUR  16.00-  .00  .00  1 1  GL  00  00  .00  .0  8.0  10  FWD  8.00-  .00  .00  013109 LV BAL DT CUR/CONT 093009/013109  CUR  8.00-  .00  .00  1 1  JD  00  00  .00  .0  .0  00  FWD  4.00-  .00  .00  093009 LV BAL DT CUR/CONT 093009/093009  CUR  4.00-  .00  .00  1 3  LA  00  09  112.00  112.0  .0  00  FWD  112.00  .00  .00  000000 LV BAL DT CUR/CONT 093009/093009  CUR  96.00  .00  .00 </pre>	<p>For our example, we will add CT, which does not display on the P430 screen.</p>
<p>2. To add the leave type on the P435 Employee Leave Data screen:</p> <ul style="list-style-type: none"> <li>▪ In the upper left corner of any screen, type P435, SSN or Employee ID, leave type to add (P435 OR##### AA)</li> <li>▪ Press [ENTER]</li> </ul>	<p>It will default to your sign-on agency and CCJ #1. You can change the CCJ.</p>
<pre>P435 OR##### CT</pre>	
<p>3. The application will display the P435 screen for the leave type. The balances will be .00. The screen will display the message LV04 NO LEAVE DETAIL DATA EXISTS.</p> <p>If you receive other screen messages, see the OSPA Reference Manual, Screen Descriptions, P435 or Codes, Screen Message Codes.</p>	

Action													More
P435 OR##### ##### CT			EMPLOYEE LEAVE DATA										The LV BAL DT and ACCRUAL BAL will be zero.
LASTNAME FIRSTNAME			LV04 NO LEAVE DETAIL DATA EXISTS										
J	SVC	LV	USE	ACCR	ACCR	MAX	MAX	MAX	ACCRUAL	REMAIN	TIME	LAST	
B	CD	TP	WAIT	MO	RATE	ACCR	USE	MO	BAL	ADV	LOST	ACTV	
1	1	CT	00	00	.00	240.0	.0	00	FWD	.00	.00	000000	
LV BAL DT CUR/CONT				000000/000000		CUR		.00		.00			
ADJ OR		CLR	ACCT	HOURS	REMAIN	TIME	LV	EXP	ENTRY				
TRFR FM/TO		OTHR	JOB	LEAVE	ADV	LOST	DATE	DATE	DATE	COMMENTS			
?													
?													
4. You will then add hours for this leave type. See Adjust Leave Hours below.													

## ADJUST LEAVE HOURS

If you wish to change the current balance for a leave manually, you can add or decrease the number of hours by adding a line on the P435 screen. Some of the reasons for adjusting the leave balance include:

- You have corrected a closed pay period. The correction will affect the amount of accrued leave the employee receives. LARS did not adjust the leave balance or adjusted it incorrectly. See Notes, Corrections to Closed Pay Periods below.
- The employee has received donated hardship leave. You will decrease the donating employee's leave. For the receiving employee, add the new leave type DH and then add the donated hours to the balance. See Notes, Donated Hardship Leave below and the OSPA Reference Manual, Handbooks, Donated Hardship Leave.
- The employee has donated leave to the Military Donated Leave Program (MDLP). See OSPA Reference Manual, Handbooks, Military Leave of Absence.
- You have added a leave type (above) and need to create the leave balance.

Action	More
<p>1. Retrieve the employee's leave record on the P435 Employee Leave Data screen:</p> <ul style="list-style-type: none"> <li>In the upper left corner of any screen, type P435, SSN or Employee ID, leave type to be adjusted (P435 OR##### AA)</li> <li>Press [ENTER]</li> </ul>	<p>It will default to your sign-on agency and CCJ #1. You can change the CCJ.</p>

P435 OR##### ##### VA													
EMPLOYEE LEAVE DATA													
LASTNAME, FIRSTNAME													
LV09 ENTER UPDATES OR NEW KEY													
J	SVC	LV	USE	ACCR	ACCR	MAX	MAX	MAX	ACCRUAL	REMAIN	TIME	LAST	
B	CD	TP	WAIT	MO	RATE	ACCR	USE	MO	BAL	ADV	LOST	ACTV	
1	4	VA	00	00	10.00	325.0	.0	00	FWD	78.03	.00	.00	033108
LV	BAL	DT	CUR/CONT	033108/053196				CUR	62.03	.00	.00		
ADJ	OR	CLR	ACCT	HOURS	REMAIN	TIME	LV	EXP	ENTRY				
TRFR	FM/TO	OTHR	JOB	LEAVE	ADV	LOST	DATE	DATE	DATE	COMMENTS			
?				8.00-	.00	.00	000000	042508	042808	DETL LABOR			
?				8.00-	.00	.00	000000	042808	042808	DETL LABOR			
?													

This employee used leave in the current pay period. The DETL LABOR is from the P004 Time Capture screen.

2. On a blank line, key the following:
- ? : a
  - ADJ/TRANS: a
  - HOURS LEAVE: # of hours to increase or decrease the balance, ##.## or ##.##-
  - COMMENTS: to create an audit trail, 12 alphanumeric characters

The sign you will enter for the HOURS LEAVE will depend on the leave type. Accrued leave has a positive balance; a positive number will increase the balance. Non-accrued leave has a negative balance; a negative number will increase the balance.

P435 OR##### ##### VA													
EMPLOYEE LEAVE DATA													
LASTNAME, FIRSTNAME													
LV09 ENTER UPDATES OR NEW KEY													
J	SVC	LV	USE	ACCR	ACCR	MAX	MAX	MAX	ACCRUAL	REMAIN	TIME	LAST	
B	CD	TP	WAIT	MO	RATE	ACCR	USE	MO	BAL	ADV	LOST	ACTV	
1	4	VA	00	00	10.00	325.0	.0	00	FWD	78.03	.00	.00	033108
LV	BAL	DT	CUR/CONT	033108/053196				CUR	62.03	.00	.00		
ADJ	OR	CLR	ACCT	HOURS	REMAIN	TIME	LV	EXP	ENTRY				
TRFR	FM/TO	OTHR	JOB	LEAVE	ADV	LOST	DATE	DATE	DATE	COMMENTS			
?				8.00-	.00	.00	000000	042508	042808	DETL LABOR			
?				8.00-	.00	.00	000000	042808	042808	DETL LABOR			
a	a			10.00-						donate CAB			
?													

The employee is donating 10 hours of hardship leave to another employee.

As an accrued leave, VA normally has a positive balance. A negative number will reduce the balance.

Action	More
<p>3. Check your entry. If it is correct, press [ENTER]. Look for the message LV92 TRANSACTION COMPLETE. If you receive other messages, see the OSPA Reference Manual, Screen Descriptions, P435 or Codes, Screen Message Codes.</p>	
<pre> P435  OR##### ##### VA      EMPLOYEE LEAVE DATA       LASTNAME, FIRSTNAME      LV09 ENTER UPDATES OR NEW KEY                                 LV92 TRANSACTION COMPLETE  J SVC LV USE  ACCR ACCR  MAX  MAX  MAX  ACCRUAL  REMAIN  TIME  LAST B CD TP WAIT  MO  RATE  ACCR  USE  MO   BAL     ADV   LOST  ACTV  1  4  VA  00   00 10.00 325.0   .0 00 FWD  78.03   .00   .00 033108 LV BAL DT CUR/CONT 033108/053196  CUR  52.03   .00   .00        ADJ OR   CLR ACCT  HOURS  REMAIN  TIME  LV EXP  ENTRY TRFR FM/TO  OTHR JOB  LEAVE   ADV    LOST   DATE   DATE  COMMENTS  ?   A                10.00-   .00    .00 000000  052808  DONATE CAB ?                8.00-   .00    .00 000000  042508  DETL LABOR ?                8.00-   .00    .00 000000  042808  DETL LABOR ? </pre>	<p>The CUR ACCRUAL BAL will change to reflect the entry.</p>

## ADVANCE LEAVE

LARS generally accrues leave the night after each final payroll run 2. When an employee leaves your agency, LARS will not have accrued the vacation and sick leave for the employee's last month. In addition, if the employee leaves before final run 2 for the prior month, LARS will not have accrued leave for that month.

As part of the separation process, you will advance the employee the accrued leave that s/he has earned. To do this, you will make entries on the P435 Employee Leave Data screen with a positive number in the HOURS LEAVE and a negative number in the REMAIN ADV. During the monthly leave accrual process, LARS will subtract the REMAIN ADV from the employee's monthly accrual. See Notes, specific leave types below.

Action	More
<p>1. Retrieve the employee's record on the P435 Employee Leave Data screen:</p> <ul style="list-style-type: none"> <li>▪ In the upper left corner of any screen, type P435, SSN or Employee ID, leave type (P435 OR##### AA)</li> <li>▪ Press [ENTER]</li> </ul>	<p>It will default to your sign-on agency and CCJ #1. You can change the CCJ.</p>

Action	More
<pre> P435  OR##### ##### VA          EMPLOYEE LEAVE DATA       LASTNAME, FIRSTNAME          LV04 NO LEAVE DETAIL DATA EXISTS  J SVC LV USE  ACCR ACCR  MAX  MAX  MAX  ACCRUAL  REMAIN  TIME  LAST B CD  TP WAIT  MO  RATE  ACCR  USE  MO    BAL    ADV   LOST  ACTV  1  1  VA  06   00  8.00  325.0   .0  00  FWD   19.28   .00   .00  000000 LV BAL DT CUR/CONT 093006/063006          CUR   19.28   .00   .00        ADJ OR    CLR ACCT  HOURS  REMAIN  TIME  LV EXP  ENTRY TRFR FM/TO  OTHR JOB  LEAVE    ADV    LOST  DATE    DATE    COMMENTS  ? </pre>	<p>For this example, the employee's accrual rate for vacation leave is 8 hours per month.</p> <p>The employee's rate may change. See Notes, Vacation Leave, Accrual Rate, Leave Accrual Service Code below.</p>
<p>2. On a blank line, key the following information:</p> <ul style="list-style-type: none"> <li>▪ ? : A</li> <li>▪ <b>ADJ/TRFR:</b> A</li> <li>▪ <b>HOURS LEAVE:</b> # to advance, ###.##, positive number</li> <li>▪ <b>REMAIN ADV:</b> # to advance, ###.##-, negative number</li> <li>▪ <b>COMMENTS:</b> create an audit trail for action, 12 characters</li> </ul>	<p>If the employee leaves before the end of the month, pro-rate the accrual. See Notes, specific leave types below.</p>
<pre> P435  OR##### ##### VA          EMPLOYEE LEAVE DATA       LASTNAME, FIRSTNAME          LV04 NO LEAVE DETAIL DATA EXISTS  J SVC LV USE  ACCR ACCR  MAX  MAX  MAX  ACCRUAL  REMAIN  TIME  LAST B CD  TP WAIT  MO  RATE  ACCR  USE  MO    BAL    ADV   LOST  ACTV  1  1  VA  06   00  8.00  325.0   .0  00  FWD   19.28   .00   .00  000000 LV BAL DT CUR/CONT 093006/063006          CUR   19.28   .00   .00        ADJ OR    CLR ACCT  HOURS  REMAIN  TIME  LV EXP  ENTRY TRFR FM/TO  OTHR JOB  LEAVE    ADV    LOST  DATE    DATE    COMMENTS  a   a                8.00   8.00-                separation ? </pre>	<p>In this example, the employee is leaving the agency at the end of the month.</p>
<p>3. Check your entries. If they are correct, press [ENTER]. Watch for the message LV92 TRANSACTION COMPLETE. If you receive other messages, see the OSPA Reference Manual, Screen Descriptions, P435 or Codes, Screen Message Codes.</p>	

Action													More
P435 OR##### ##### VA			EMPLOYEE LEAVE DATA										The transaction will change the CUR BAL and REMAIN ADV.
LASTNAME, FIRSTNAME			LV99 ENTER UPDATES OR NEW KEY LV92 TRANSACTION COMPLETE										
J	SVC	LV	USE	ACCR	ACCR	MAX	MAX	MAX	ACCRUAL	REMAIN	TIME	LAST	During the monthly leave accrual process, LARS will subtract the REMAIN ADV from the monthly accrual.
B	CD	TP	WAIT	MO	RATE	ACCR	USE	MO	BAL	ADV	LOST	ACTV	
1	1	VA	06	00	8.00	325.0	.0	00	FWD	19.28	.00	.00	000000
LV	BAL	DT	CUR/CONT	093006/063006					CUR	27.28	8.00-	.00	
ADJ	OR	CLR	ACCT	HOURS	REMAIN	TIME	LV	EXP	ENTRY				
TRFR	FM/TO	OTHR	JOB	LEAVE	ADV	LOST	DATE	DATE	DATE	COMMENTS			
?	A			8.00	8.00-	.00	000000	120406	SEPARATION				

## CHANGE AN EXISTING ENTRY ON THE P435

If you wish to change an existing transaction on the P435 screen, do the following:

Action													More
1. Retrieve the employee's leave record on the P435 Employee Leave Data screen:													It will default to your sign-on agency and CCJ #1. You can change the CCJ.
<ul style="list-style-type: none"> <li>In the upper left corner of any screen, type P435, SSN or Employee ID, leave type (P435 OR##### AA)</li> <li>Press [ENTER]</li> </ul>													
P435 OR##### ##### VA			EMPLOYEE LEAVE DATA										
LASTNAME, FIRSTNAME			LV99 ENTER UPDATES OR NEW KEY										
J	SVC	LV	USE	ACCR	ACCR	MAX	MAX	MAX	ACCRUAL	REMAIN	TIME	LAST	
B	CD	TP	WAIT	MO	RATE	ACCR	USE	MO	BAL	ADV	LOST	ACTV	
1	4	VA	00	00	10.00	325.0	.0	00	FWD	78.03	.00	.00	033108
LV	BAL	DT	CUR/CONT	033108/053196					CUR	52.03	.00	.00	
ADJ	OR	CLR	ACCT	HOURS	REMAIN	TIME	LV	EXP	ENTRY				
TRFR	FM/TO	OTHR	JOB	LEAVE	ADV	LOST	DATE	DATE	DATE	COMMENTS			
?	A			10.00-	.00	.00	000000	052808	DONATE CAB				
?				8.00-	.00	.00	000000	042508	DETL LABOR				
?				8.00-	.00	.00	000000	042808	DETL LABOR				
?													

Action

More

2. On the line you wish to change, key the following information:

- ? : c
- **ADJ/TRANS:** a
- **HOURS LEAVE:** # of hours it should be, ###.##
- **COMMENTS:** audit trail, 12 alphanumeric characters

The sign you will enter for the HOURS LEAVE will depend on the leave type. Accrued leave has a positive balance; a positive number will increase the balance. Non-accrued leave has a negative balance; a negative number will increase the balance.

In this example, we changed the number of hours donated from 10 to 15.

P435		OR#####		#####		VA		EMPLOYEE LEAVE DATA						
LASTNAME, FIRSTNAME								LV09 ENTER UPDATES OR NEW KEY						
J	SVC	LV	USE	ACCR	ACCR	MAX	MAX	MAX	ACCRUAL	REMAIN	TIME	LAST		
B	CD	TP	WAIT	MO	RATE	ACCR	USE	MO	BAL	ADV	LOST	ACTV		
1	4	VA	00	00	10.00	325.0	.0	00	FWD	78.03	.00	.00	033108	
LV	BAL	DT	CUR/CONT	033108/053196				CUR	52.03	.00	.00			
ADJ	OR	CLR	ACCT	HOURS	REMAIN	TIME	LV	EXP	ENTRY					
TRFR	FM/TO	OTHR	JOB	LEAVE	ADV	LOST	DATE	DATE	DATE	COMMENTS				
c	a			15.00-	.00	.00	000000	052808	DONATE CAB					
?				8.00-	.00	.00	000000	042508	DETL LABOR					
?				8.00-	.00	.00	000000	042808	DETL LABOR					
?														

3. Check your entries. If they are correct, press [ENTER]. Look for the message LV92 TRANSACTION COMPLETE. If you receive other messages, see the OSPA Reference Manual, Screen Descriptions, P435 or Codes, Screen Message Codes.

The ACCRUAL BAL CUR will reflect the change.

P435		OR#####		#####		VA		EMPLOYEE LEAVE DATA						
LASTNAME, FIRSTNAME								LV09 ENTER UPDATES OR NEW KEY						
J	SVC	LV	USE	ACCR	ACCR	MAX	MAX	MAX	ACCRUAL	REMAIN	TIME	LAST		
B	CD	TP	WAIT	MO	RATE	ACCR	USE	MO	BAL	ADV	LOST	ACTV		
1	4	VA	00	00	10.00	325.0	.0	00	FWD	78.03	.00	.00	033108	
LV	BAL	DT	CUR/CONT	033108/053196				CUR	47.03	.00	.00			
ADJ	OR	CLR	ACCT	HOURS	REMAIN	TIME	LV	EXP	ENTRY					
TRFR	FM/TO	OTHR	JOB	LEAVE	ADV	LOST	DATE	DATE	DATE	COMMENTS				
?	A			15.00-	.00	.00	000000	052808	DONATE CAB					
?				8.00-	.00	.00	000000	042508	DETL LABOR					
?				8.00-	.00	.00	000000	042808	DETL LABOR					
?														

## DELETE AN EXISTING ENTRY ON THE P435

If there is an entry on the P435 screen that you do not want to post to the employee's leave records, you can delete it from the P435 screen. Transactions do not post to the database until the monthly leave accrual after final payroll run 2.

Action	More
<p>1. Retrieve the employee's leave record on the P435 Employee Leave Data screen:</p> <ul style="list-style-type: none"> <li>▪ In the upper left corner of any screen, type P435, SSN or Employee ID, leave type (P435 OR##### AA)</li> <li>▪ Press [ENTER]</li> </ul>	<p>It will default to your sign-on agency and CCJ #1. You can change the CCJ.</p>
<pre> P435  OR##### ##### VA          EMPLOYEE LEAVE DATA       LASTNAME, FIRSTNAME          LV09 ENTER UPDATES OR NEW KEY  J SVC LV USE  ACCR ACCR  MAX  MAX  MAX  ACCRUAL  REMAIN  TIME  LAST B CD  TP WAIT  MO  RATE  ACCR  USE  MO   BAL     ADV   LOST  ACTV  1  4  VA  00   00 10.00 325.0   .0 00 FWD   78.03   .00   .00 033108 LV BAL DT CUR/CONT 033108/053196      CUR   47.03   .00   .00        ADJ OR    CLR ACCT  HOURS    REMAIN    TIME  LV EXP  ENTRY TRFR FM/TO  OTHR JOB  LEAVE      ADV     LOST   DATE   DATE  COMMENTS  ?   A                15.00-    .00     .00 000000  052808  DONATE CAB ?                8.00-    .00     .00 000000  042508  DETL LABOR ?                8.00-    .00     .00 000000  042808  DETL LABOR ? </pre>	
<p>2. On the line you wish to delete, type d over the ?.</p>	
<pre> P435  OR##### ##### VA          EMPLOYEE LEAVE DATA       LASTNAME, FIRSTNAME          LV09 ENTER UPDATES OR NEW KEY  J SVC LV USE  ACCR ACCR  MAX  MAX  MAX  ACCRUAL  REMAIN  TIME  LAST B CD  TP WAIT  MO  RATE  ACCR  USE  MO   BAL     ADV   LOST  ACTV  1  4  VA  00   00 10.00 325.0   .0 00 FWD   78.03   .00   .00 033108 LV BAL DT CUR/CONT 033108/053196      CUR   47.03   .00   .00        ADJ OR    CLR ACCT  HOURS    REMAIN    TIME  LV EXP  ENTRY TRFR FM/TO  OTHR JOB  LEAVE      ADV     LOST   DATE   DATE  COMMENTS  d   A                15.00-    .00     .00 000000  052808  DONATE CAB ?                8.00-    .00     .00 000000  042508  DETL LABOR ?                8.00-    .00     .00 000000  042808  DETL LABOR ? </pre>	
<p>3. Press [ENTER]. Look for the message LV92 TRANSACTION COMPLETE. If you receive other messages, see the OSPA Reference Manual, Screen Descriptions, P435 or Codes, Screen Message Codes.</p>	

Action													More	
P435 OR##### ##### VA			EMPLOYEE LEAVE DATA										The CUR balance will change to reflect the transaction deleted.	
LASTNAME, FIRSTNAME			LV09 ENTER UPDATES OR NEW KEY											
			LV92 TRANSACTION COMPLETE											
J	SVC	LV	USE	ACCR	ACCR	MAX	MAX	MAX	ACCRUAL	REMAIN	TIME	LAST		
B	CD	TP	WAIT	MO	RATE	ACCR	USE	MO	BAL	ADV	LOST	ACTV		
1	4	VA	00	00	10.00	325.0	.0	00	FWD	78.03	.00	.00		033108
LV	BAL	DT	CUR/CONT	033108/053196					CUR	62.03	.00	.00		
ADJ	OR	CLR	ACCT	HOURS	REMAIN	TIME	LV	EXP	ENTRY					
TRFR	FM/TO	OTHR	JOB	LEAVE	ADV	LOST	DATE	DATE	DATE	COMMENTS				
?				8.00-	.00	.00	000000	042508	DETL	LABOR				
?				8.00-	.00	.00	000000	042808	DETL	LABOR				
?														

## PAY-OFF LEAVE

Examples of when you might make an entry on the P050 screen include:

- When an employee separates from state service
- When an employee transfers to another state agency and the receiving agency does not accept all of the employee's leave
- When the employee reaches the maximum amount allowed and is entitled to a pay-off
- To convert leave hours to dollars when an employee donates vacation leave or compensatory time to the Military Donated Leave Program, see the OSPA Reference Manual, Handbooks, Military Leave of Absence.

The employee must have an accrued leave balance and be eligible for a pay-off. The employee's bargaining agreement or statewide policy determines the maximum amount that the employee may accrue and the circumstances and maximum amount for a pay-off.

You will use the P050 Gross Pay Adjustments on File screen. If you make the entry with RATE and UNITS, the application will reduce the employee's leave hours on the P435 screen. NOTE: the leave balances on the P003 and P004 Time Capture screens will not reflect P050 entries.

**NOTE:** OSPS will not write a manual or off-cycle check to pay-off vacation or compensatory time for a current employee. Make the P050 entry and allow it to process through a normal payroll run.

Action	More
<ol style="list-style-type: none"> <li>You can identify the amount of leave to pay-off on the P430 Employee Leave Data screen. <ul style="list-style-type: none"> <li>In the top left corner of any screen, type P430 SSN or employee ID (P430 OR#####)</li> <li>Press [ENTER]</li> </ul> </li> </ol>	It will default to your sign-on agency and CCJ #1. You can change the CCJ.

Action	More
<pre> P430  OR##### #####          EMPLOYEE LEAVE DATA       LASTNAME FIRSTNAME  RECOGNIZED SERVICE DATE: 091807          DATA IN LEAVE CLEARING ACCOUNT: N  J SVC LV USE  ACCR ACCR  MAX  MAX  MAX  ACCRUAL  REMAIN  TIME  LAST B CD  TP WAIT MO  RATE  ACCR  USE  MO  BAL  ADV  LOST  ACTV 1  1  PB  05  06  24.00  24.0  .0  06  FWD  24.00  .00  .00  053109 LV BAL DT CUR/CONT 093009/063009          CUR  24.00  .00  .00  1  1  SL  00  00  8.00  9999.0  .0  00  FWD  104.29  .00  .00  083109 LV BAL DT CUR/CONT 093009/093007          CUR  104.29  .00  .00  1  1  VA  05  00  8.00  300.0  .0  00  FWD  139.60  .00  .00  123108 LV BAL DT CUR/CONT 093009/093007          CUR  139.60  .00  .00                                    FWD LV BAL DT CUR/CONT                  CUR           </pre>	<p>For our example, the employee is leaving state service.</p>
<p>2. To make the entry on the P050 Gross Pay Adjustments on File screen, you need the EQUIVALENT RATE (employee's hourly rate) from the P030 Job Status Data screen.</p> <ul style="list-style-type: none"> <li>▪ In the top left corner of any screen, type P030 SSN or employee ID (P030 OR#####)</li> <li>▪ Press [ENTER]</li> </ul>	<p>It will default to your sign-on agency and CCJ #1. You can change the CCJ.</p>
<pre> P030  OR##### ,##### ,1,999999          JOB STATUS DATA          030       LASTNAME, FIRSTNAME  *** JOB STATUS INFO ***          *** CONCURRENT JOB INFO *** JOB STAT START/STOP 110108/999999          REPORT DISTR CD 000 PERS AGY/POS/DFC/SC #####/0000164/0/0          RECOG SVC DT 091807 PT-FT CD/PCT F/1.0000          CITY CNTY CD 24/M APPOINTMENT TYP DT/CD 091807/L          STANDARD HRS PER DAY 8.000 EMP REPR/CLS/OPT/STEP UA /C5232 /A/A/09          MASS TRANSIT DIST S PERSONNEL TRANS CD P5A 237          TIMESHEET CD 2 BENEFIT PKG CD CU          EMPLOYEE ID ##### LEAVE ACCRUAL SVC CD 1 PERS JOB CLASS CODE G CREW-UNIT WAGE BASIS CD S PERSONNEL BASE RATE 3904.00          ---FUND SPLITS---          -FIXED MLY DIFFS-- ADJUSTED BASE 3904.00          LABOR COSTING PCT          PAY PCT/ PCT/ PERSONNEL PAY RATE 3904.00          TYPE AMT AMT EQUIVALENT RATE 22.52          CD HOLIDAY PKG CD O          094150100000 1.0000 LOA BEG DT/CD/END SEPARATION DT/REASON O-T/FLSA CD Y/N LAST PA NUMBR/TRAN DT SALADJ 110408           </pre>	<p>See the OSPA Reference Manual, Screen Descriptions, P030.</p>
<p>3. After you have the EQUIVALENT RATE, retrieve the record on the P050 screen:</p> <ul style="list-style-type: none"> <li>▪ In the upper left corner of any screen, type P050, SSN or Employee ID (P050 OR#####)</li> <li>▪ Press [ENTER]</li> </ul>	<p>It will default to your sign-on agency, CCJ #1 and the current pay period.</p>

Action	More
<pre> P050  OR##### ,##### ,1,113009  GROSS PAY ADJUSTMENTS ON FILE       LASTNAME, FIRSTNAME I        PAY  STRT  STOP ADJ       TYP  DATE  DATE TYP   RATE   UNITS   AMOUNT   DAYS   TRAN       ? IR 103107 999999   .00    .00    .00      WRKD  DATE  ERROR MSG       INS RETURN                                102507  COMMENT        ?                A  COMMENT           </pre>	<p>See the OSPA Reference Manual, Screen Descriptions, P050.</p>
<p>4. On a blank line or over an existing entry, key the following information:</p> <ul style="list-style-type: none"> <li>▪ <b>? : A</b></li> <li>▪ <b>PAY TYPE:</b> See the following topics in Notes below: <ul style="list-style-type: none"> <li>○ Compensatory and Straight Time Accrued, Compensatory Time Pay-off</li> <li>○ Donated Military Leave</li> <li>○ Vacation Leave, Vacation Pay-off</li> </ul> </li> <li>▪ <b>RATE:</b> EQUIVALENT RATE from the P030 screen</li> <li>▪ <b>UNITS:</b> number of hours to pay off, ###.##</li> <li>▪ <b>COMMENT:</b> To create an audit trail, 12 characters</li> </ul>	<p>Allow ADJ TYP to default to A – one-time adjustment.</p>
<pre> P050  OR##### ,##### ,1,113009  GROSS PAY ADJUSTMENTS ON FILE       LASTNAME, FIRSTNAME I        PAY  STRT  STOP ADJ       TYP  DATE  DATE TYP   RATE   UNITS   AMOUNT   DAYS   TRAN       ? IR 103107 999999   .00    .00    .00      WRKD  DATE  ERROR MSG       INS RETURN                                102507  COMMENT        a vap                A 22.52  139.60  COMMENT sep 1109        ?                A  COMMENT           </pre>	<p>OSPA will populate STRT DATE, STOP DATE and AMOUNT when you save the transaction.</p>
<p>5. Check your entries. If they are correct, press [ENTER]. Watch for the message GP93 TRANSACTION COMPLETE. If you receive other messages, see the OSPA Reference Manual, Screen Descriptions, P050 or Codes, Screen Message Codes.</p>	

Action	More																																																																																																																							
<p>P050 OR##### ,##### ,1,113009 LASTNAME, FIRSTNAME I GROSS PAY ADJUSTMENTS ON FILE GP93 TRANSACTION COMPLETE</p> <table border="1"> <thead> <tr> <th>PAY</th> <th>STRT</th> <th>STOP</th> <th>ADJ</th> <th></th> <th></th> <th></th> <th>DAYS</th> <th>TRAN</th> <th></th> <th></th> </tr> <tr> <th>TYP</th> <th>DATE</th> <th>DATE</th> <th>TYP</th> <th>RATE</th> <th>UNITS</th> <th>AMOUNT</th> <th>WRKD</th> <th>DATE</th> <th>ERROR</th> <th>MSG</th> </tr> </thead> <tbody> <tr> <td>? VAP</td> <td>113009</td> <td>113009</td> <td>A</td> <td>22.52</td> <td>139.60</td> <td>3143.79</td> <td></td> <td>110609</td> <td></td> <td></td> </tr> <tr> <td colspan="10">VAC PAYOFF</td> <td>COMMENT SEP 1109</td> </tr> <tr> <td>? IR</td> <td>103107</td> <td>999999</td> <td></td> <td>.00</td> <td>.00</td> <td>.00</td> <td></td> <td>102507</td> <td></td> <td></td> </tr> <tr> <td colspan="10">INS RETURN</td> <td>COMMENT</td> </tr> </tbody> </table>	PAY	STRT	STOP	ADJ				DAYS	TRAN			TYP	DATE	DATE	TYP	RATE	UNITS	AMOUNT	WRKD	DATE	ERROR	MSG	? VAP	113009	113009	A	22.52	139.60	3143.79		110609			VAC PAYOFF										COMMENT SEP 1109	? IR	103107	999999		.00	.00	.00		102507			INS RETURN										COMMENT	<p>OSPA uses the date in the screen access key for the STRT DATE. Because this is a one-time entry, it uses the same date for the STOP DATE.</p> <p>OSPA calculated the AMOUNT from the RATE and UNITS entered.</p>																																																					
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<p>6. Until the leave accrual process runs, the P435 screen will display the P050 entry:</p>																																																																																																																								
<p>P435 OR##### ,##### ,VA LASTNAME, FIRSTNAME EMPLOYEE LEAVE DATA LV09 ENTER UPDATES OR NEW KEY</p> <table border="1"> <thead> <tr> <th>J</th> <th>SVC</th> <th>LV</th> <th>USE</th> <th>ACCR</th> <th>ACCR</th> <th>MAX</th> <th>MAX</th> <th>MAX</th> <th>ACCRUAL</th> <th>REMAIN</th> <th>TIME</th> <th>LAST</th> </tr> <tr> <th>B</th> <th>CD</th> <th>TP</th> <th>WAIT</th> <th>MO</th> <th>RATE</th> <th>ACCR</th> <th>USE</th> <th>MO</th> <th>BAL</th> <th>ADV</th> <th>LOST</th> <th>ACTV</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>1</td> <td>VA</td> <td>05</td> <td>00</td> <td>8.00</td> <td>300.0</td> <td>.0</td> <td>00</td> <td>FWD</td> <td>139.60</td> <td>.00</td> <td>.00</td> <td>123108</td> </tr> <tr> <td colspan="10">LV BAL DT CUR/CONT 093009/093007</td> <td>CUR</td> <td>.00</td> <td>.00</td> <td></td> </tr> <tr> <th>ADJ</th> <th>OR</th> <th>CLR</th> <th>ACCT</th> <th>HOURS</th> <th>REMAIN</th> <th>TIME</th> <th>LV</th> <th>EXP</th> <th>ENTRY</th> <th></th> <th></th> <th></th> </tr> <tr> <th>TRFR</th> <th>FM/TO</th> <th>OTHR</th> <th>JOB</th> <th>LEAVE</th> <th>ADV</th> <th>LOST</th> <th>DATE</th> <th>DATE</th> <th>COMMENTS</th> <th></th> <th></th> <th></th> </tr> <tr> <td colspan="4"></td> <td>139.60-</td> <td>.00</td> <td>.00</td> <td>000000</td> <td>113009</td> <td>GR PAY ADJ</td> <td></td> <td></td> <td></td> </tr> <tr> <td colspan="13">?</td> </tr> <tr> <td colspan="13">?</td> </tr> </tbody> </table>	J	SVC	LV	USE	ACCR	ACCR	MAX	MAX	MAX	ACCRUAL	REMAIN	TIME	LAST	B	CD	TP	WAIT	MO	RATE	ACCR	USE	MO	BAL	ADV	LOST	ACTV	1	1	VA	05	00	8.00	300.0	.0	00	FWD	139.60	.00	.00	123108	LV BAL DT CUR/CONT 093009/093007										CUR	.00	.00		ADJ	OR	CLR	ACCT	HOURS	REMAIN	TIME	LV	EXP	ENTRY				TRFR	FM/TO	OTHR	JOB	LEAVE	ADV	LOST	DATE	DATE	COMMENTS								139.60-	.00	.00	000000	113009	GR PAY ADJ				?													?													
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<p>7. The P370 screen will also reflect the pay-off.</p> <ul style="list-style-type: none"> <li>In the upper left corner of any screen, type P370, SSN or Employee ID, pay period end date, check date (P370 OR##### MMDDYY MMDDYY)</li> <li>Press [ENTER]</li> </ul>	<p>OSPA will default to your log-in agency number</p>																																																																																																																							
<p>P370 OR##### ,##### ,113009,110609,O CALCULATION OF CURRENT PAYOFF 370 LASTNAME, FIRSTNAME I</p> <table border="1"> <thead> <tr> <th>INCOME</th> <th>TYPE</th> <th>RATE</th> <th>UNITS</th> <th>AMOUNT</th> <th>TAX /RET</th> <th>AMOUNT</th> <th>DEDUCTIONS</th> <th>AMOUNT</th> </tr> </thead> <tbody> <tr> <td>TOTAL-R</td> <td>T</td> <td>3904.00</td> <td>160.00</td> <td>3718.10</td> <td>FIT</td> <td>912.37</td> <td>AEEN100 EMP</td> <td>2.00</td> </tr> <tr> <td>FURLOUG</td> <td>N</td> <td></td> <td>8.00</td> <td></td> <td>SIT</td> <td>533.00</td> <td>LTNN001 DEP</td> <td>1.29</td> </tr> <tr> <td>ADDNL S</td> <td>T</td> <td>22.52</td> <td>5.00</td> <td>112.60</td> <td>SSEC</td> <td>440.44</td> <td>OONN002 OPT</td> <td></td> </tr> <tr> <td>AVAC PAY</td> <td>T</td> <td>22.52</td> <td>139.60</td> <td>3143.79</td> <td>MEDR</td> <td>103.00</td> <td>OPNNBBB ODS</td> <td></td> </tr> <tr> <td>AINS RET</td> <td>T</td> <td></td> <td></td> <td>140.17</td> <td>WBF</td> <td>2.09</td> <td>SINN001 PEBB</td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>ERETG</td> <td>112.77</td> <td>SLNN001 BASI</td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>SRETG</td> <td>238.25</td> <td>UGNAAA EMP</td> <td>10.80</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>UONN020 SP/D</td> <td>3.70</td> </tr> <tr> <td>GROSS</td> <td>7114.66</td> <td>TX/RT</td> <td>1990.90</td> <td>DED</td> <td>17.79</td> <td>NET/ACH</td> <td>5105.97 /</td> <td>.00</td> </tr> <tr> <td colspan="9">CALC YTD? N</td> </tr> </tbody> </table>	INCOME	TYPE	RATE	UNITS	AMOUNT	TAX /RET	AMOUNT	DEDUCTIONS	AMOUNT	TOTAL-R	T	3904.00	160.00	3718.10	FIT	912.37	AEEN100 EMP	2.00	FURLOUG	N		8.00		SIT	533.00	LTNN001 DEP	1.29	ADDNL S	T	22.52	5.00	112.60	SSEC	440.44	OONN002 OPT		AVAC PAY	T	22.52	139.60	3143.79	MEDR	103.00	OPNNBBB ODS		AINS RET	T			140.17	WBF	2.09	SINN001 PEBB							ERETG	112.77	SLNN001 BASI							SRETG	238.25	UGNAAA EMP	10.80								UONN020 SP/D	3.70	GROSS	7114.66	TX/RT	1990.90	DED	17.79	NET/ACH	5105.97 /	.00	CALC YTD? N									<p>See the OSPA Reference Manual, Screen Descriptions, P370.</p>																				
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Action	More
<p>8. For a separated employee, you cannot make a P050 entry after the employee's SEPARATION DT on the P030 screen. You can request that OSPS make the entry:</p> <ul style="list-style-type: none"> <li>▪ Bring up the employee's record on the P050 screen. (As long as the employee has a record on the P032 Job Status Display screen, OSPA will display the employee's ID and name on the screen.)</li> <li>▪ Enter the PAY TYP, RATE, UNITS and work charge code(s), if needed. See the OSPA Reference Manual, Screen Descriptions, P050.</li> <li>▪ OSPA will not allow you to save it. With the data displaying, make a screen print.</li> <li>▪ Write in the reason for the adjustment.</li> <li>▪ Send the screen print to OSPS for entry.</li> </ul>	

## RESTORE LOST LEAVE

Under some bargaining agreements, employees have a maximum number of hours of compensatory time they may accrue. If the employee exceeds the maximum, LARS will reduce the balance during the monthly leave accrual process. If the employee is eligible for a CT pay-off for hours lost, you must restore the lost leave before you can pay it off.

The month prior to the adjustment, the following reports will display the message "IN DANGER OF LOSING". After LARS makes the adjustment, the reports will include the message "LOST LEAVE."

- Employee's Pay Stub
- E505-152 Employee's Leave Balance and Usage
- B470C, B470D, B470S Leave Accrual Registers

In addition, after each leave accrual, LARS produces the E404-25-1 Lost Leave Accrual CT Balances report. It lists employees who have lost CT because they have exceeded the maximum amount.

Action	More
<p>1. Retrieve the employee's CT leave record on the P435 Employee Leave Data screen:</p> <ul style="list-style-type: none"> <li>▪ In the top left corner of any screen, type P435, SSN or Employee ID, CT (P435 OR##### CT)</li> <li>▪ Press [ENTER]</li> </ul>	<p>It will default to your sign-on agency and CCJ #1. You can change the CCJ.</p>

Action	More
<pre> P435  OR##### ##### CT          EMPLOYEE LEAVE DATA       LASTNAME, FIRSTNAME          LV04 NO LEAVE DETAIL DATA EXISTS  J SVC LV USE  ACCR ACCR  MAX  MAX  MAX  ACCRUAL  REMAIN  TIME  LAST B CD  TP WAIT  MO  RATE  ACCR  USE  MO    BAL    ADV   LOST  ACTV  1  6  CT  00   00 00.00 240.0   .0 00 FWD    .00   .00  44.50 063006 LV BAL DT CUR/CONT 063006/043006      CUR    .00   .00  44.50        ADJ OR    CLR ACCT  HOURS  REMAIN  TIME  LV EXP  ENTRY TRFR FM/TO  OTHR JOB  LEAVE    ADV    LOST  DATE    DATE    COMMENTS  ?</pre>	<p>The TIME LOST column on the P435 screen displays the number of hours LARS removed. This is a cumulative amount and may include multiple leave accrual runs.</p>
<p>2. On a blank line, key the following information:</p> <ul style="list-style-type: none"> <li>▪ ? : a</li> <li>▪ <b>ADJ/TRFR:</b> a</li> <li>▪ <b>HOURS LEAVE:</b> # to restore, ##.##, positive amount</li> <li>▪ <b>TIME LOST:</b> # to restore, ##.##-, negative amount</li> <li>▪ <b>COMMENTS:</b> to create an audit trail, 12 characters</li> </ul>	<p>Comp time is accrued leave and has a positive balance.</p>
<pre> P435  OR##### ##### CT          EMPLOYEE LEAVE DATA       LASTNAME, FIRSTNAME          LV04 NO LEAVE DETAIL DATA EXISTS  J SVC LV USE  ACCR ACCR  MAX  MAX  MAX  ACCRUAL  REMAIN  TIME  LAST B CD  TP WAIT  MO  RATE  ACCR  USE  MO    BAL    ADV   LOST  ACTV  1  6  CT  00   00 00.00 240.0   .0 00 FWD    .00   .00  44.50 063006 LV BAL DT CUR/CONT 063006/043006      CUR    .00   .00  44.50        ADJ OR    CLR ACCT  HOURS  REMAIN  TIME  LV EXP  ENTRY TRFR FM/TO  OTHR JOB  LEAVE    ADV    LOST  DATE    DATE    COMMENTS  a    a                44.50          44.50-          payoff ct ?</pre>	<p>3. Check your entries. If they are right, press [ENTER]. Watch for the message LV92 TRANSACTION COMPLETE. If you receive other messages, see the OSPA Reference Manual, Screen Descriptions, P435 or Codes, Screen Message Codes.</p>

Action													More																																																																																													
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<p>4. See Entries, Pay-off Leave above to pay the employee for the restored leave.</p> <p><b>NOTE:</b> OSPS will not write a manual or off-cycle check to pay-off compensatory time for a current employee. Make the P050 entry and allow it to process through a normal payroll run.</p>																																																																																																										

## TRANSFER LEAVE FROM ONE CCJ TO ANOTHER CCJ

Leave balances are concurrent job specific. If the leave posted to the wrong CCJ, you can transfer it to the right one.

**REMINDER:** If a leave type is accruable (LV TP = A on the PTB2 screen), a positive entry will increase the balance and a negative entry will decrease it. If the leave is not accruable (LV TP ≠ A or N on the PTB2 screen), a negative entry will increase the balance and a positive entry will decrease it. When you transfer leave **from** another CCJ, you are increasing the leave balance; use a sign that will increase the leave. If you are transferring **to** another CCJ, you are decreasing the leave balance; use a sign that will decrease the balance.

Action													More
<p>1. Retrieve the employee's leave record on the P435 Employee Leave Data screen:</p> <ul style="list-style-type: none"> <li>▪ In the top left corner of any screen, type P435, SSN or Employee ID, CCJ, leave type (P435 OR##### # AA)</li> <li>▪ Press [ENTER]</li> </ul>													<p>It will default to your sign-on agency and CCJ #1. You can change the CCJ.</p>

Action	More
<pre> P435  OR##### ##### 1 SL          EMPLOYEE LEAVE DATA       LASTNAME, FIRSTNAME          LV04 NO LEAVE DETAIL DATA EXISTS  J SVC LV USE  ACCR ACCR  MAX  MAX  MAX  ACCRUAL  REMAIN  TIME  LAST B CD  TP WAIT  MO  RATE  ACCR  USE  MO    BAL    ADV   LOST  ACTV  1  4  SL  00   00  8.00 9999.0   .0 00 FWD  795.01   .00   .00  093006 LV BAL DT CUR/CONT 093006/043098      CUR  795.01   .00   .00        ADJ OR    CLR ACCT  HOURS  REMAIN  TIME  LV EXP  ENTRY TRFR FM/TO  OTHR JOB  LEAVE    ADV    LOST  DATE    DATE    COMMENTS  ? </pre>	
<p>2. On a blank line, key the following information:</p> <ul style="list-style-type: none"> <li>▪ ? : A</li> <li>▪ <b>ADJ/TRFR:</b> T (to other job) or F (from other job)</li> <li>▪ <b>CLR ACT/OTHER JOB:</b> job number leave being transferred to or from, #</li> <li>▪ <b>HOURS LEAVE:</b> # to transfer, ##.##</li> <li>▪ <b>COMMENTS:</b> audit trail for action, 12 characters</li> </ul>	<p>If transferring <b>from</b> this CCJ, use a sign to decrease the leave balance.</p> <p>If transferring <b>to</b> this CCJ, use a sign to increase the balance.</p>
<pre> P435  OR##### ##### 1 SL          EMPLOYEE LEAVE DATA       LASTNAME, FIRSTNAME          LV04 NO LEAVE DETAIL DATA EXISTS  J SVC LV USE  ACCR ACCR  MAX  MAX  MAX  ACCRUAL  REMAIN  TIME  LAST B CD  TP WAIT  MO  RATE  ACCR  USE  MO    BAL    ADV   LOST  ACTV  1  4  SL  00   00  8.00 9999.0   .0 00 FWD  795.01   .00   .00  093006 LV BAL DT CUR/CONT 093006/043098      CUR  795.01   .00   .00        ADJ OR    CLR ACCT  HOURS  REMAIN  TIME  LV EXP  ENTRY TRFR FM/TO  OTHR JOB  LEAVE    ADV    LOST  DATE    DATE    COMMENTS  a  t          2    50.00-                correct CCJ  ? </pre>	<p>In this example, we are transferring leave from CCJ 1 to CCJ 2.</p>
<p>3. Check your entries. If they are right, press [ENTER]. Look for the message LV92 TRANSACTION COMPLETE. If you receive other messages, see the OSPA Reference Manual, Screen Descriptions, P435 or Codes, Screen Message Codes.</p>	

Action													More
P435	OR#####	#####	SL	EMPLOYEE LEAVE DATA									
LASTNAME, FIRSTNAME				LV09 ENTER UPDATES OR NEW KEY									
				LV92 TRANSACTION COMPLETE									
J	SVC	LV	USE	ACCR	ACCR	MAX	MAX	MAX	ACCRUAL	REMAIN	TIME	LAST	
B	CD	TP	WAIT	MO	RATE	ACCR	USE	MO	BAL	ADV	LOST	ACTV	
1	4	SL	00	00	8.00	9999.0	.0	00	FWD	795.01	.00	093006	
LV	BAL	DT	CUR/CONT	093006/043098					CUR	745.01	.00	.00	
ADJ	OR	CLR	ACCT	HOURS	REMAIN	TIME	LV	EXP	ENTRY				
TRFR	FM/TO	OTHR	JOB	LEAVE	ADV	LOST	DATE	DATE	DATE	COMMENTS			
?	T		2	50.00-	.00	.00	123108			CORRECT CCJ			
?													

## TRANSFER LEAVE TO OR FROM THE CLEARING ACCOUNT

We use the leave clearing account to store furlough obligation (LA), military (ML), personal business (PB), pre-retirement (PR), sick (SL) and vacation (VA) leave balances for transferring and separating employees. Leave balances will remain in the clearing account until an agency transfers them out or they expire (LV EXP DATE).

If the employee has leave in the clearing account, the P430 Employee Leave Data screen will display DATA IN LEAVE CLEARING ACCOUNT: Y. The B470C, B470D and B470S Leave Accrual Registers will display the message "CLEARING ACCOUNT HAS NON ZERO BALANCE."

Some of the reasons that an employee may have leave in the clearing account include:

- If an employee transfers from one state agency to another, the losing agency will transfer the employee's leave balances to the leave clearing account. After the employee's JOB START DATE on the P030 Job Status Data screen, the gaining agency can transfer the leave out of the clearing account to the new agency. See the OSPA Reference Manual, Recommended Practice, Transfers.
- When an employee separates from state service, the losing agency also transfers some leave balances to the clearing account. If an employee returns to state service, the employee may be eligible to have leave restored from the clearing account. See the OSPA Reference Manual, Recommended Practices, Separations and New Employees.

**REMINDER:** If a leave type is accruable (LV TP = A on the PTB2 screen), a positive entry will increase the balance and a negative entry will decrease it. If the leave is not accruable (LV TP ≠ A or N on the PTB2 screen), a negative entry will increase the balance and a positive entry will decrease it. When you transfer leave **from** the clearing account, you are increasing the leave balance; use a sign that will increase the leave. When you transfer leave **to** the clearing account, you are decreasing the leave balance.

Action	More
<p>1. To view the balances in the clearing account, access the P420 Leave Clearing Account Balances screen.</p> <ul style="list-style-type: none"> <li>In the top left corner of any screen, type P420, SSN or employee ID (P420 OR#####)</li> <li>Press [ENTER]</li> </ul>	
<pre> P420  OR##### #####          LEAVE CLEARING ACCOUNT BALANCES ----- LV      -----TRANSFERS IN-----  ----TRANSFERS OUT----  ACCOUNT  LV EXP TYPE    DATE  AGY   HRS          DATE  AGY   HRS          BALANCE  DATE ----- SL  CUR BAL 120106 13700  795.01          795.01  123108           </pre>	<p>This employee separated from state service. The agency transferred sick leave to the clearing account. If the employee returns within two years, the hiring agency will restore the leave.</p>
<p>2. To transfer the leave, retrieve the employee's leave record on the P435 Employee Leave Data screen:</p> <ul style="list-style-type: none"> <li>In the top left corner of any screen, type P435, SSN or Employee ID, leave type (P435 OR##### AA)</li> <li>Press [ENTER]</li> </ul>	<p>It will default to your sign-on agency and CCJ #1. You can change the CCJ.</p>
<pre> P435  OR##### ##### SL          EMPLOYEE LEAVE DATA LASTNAME, FIRSTNAME          LV09 ENTER UPDATES OR NEW KEY ----- J SVC LV USE ACCR ACCR  MAX  MAX  MAX  ACCRUAL  REMAIN  TIME  LAST B CD  TP WAIT MO  RATE  ACCR  USE  MO    BAL    ADV   LOST  ACTV ----- 1  4  SL  00  00  8.00 9999.0  .0 00 FWD   .00   .00   .00 093006 LV BAL DT CUR/CONT 093006/043098  CUR   .00   .00   .00 ----- ADJ OR   CLR ACCT  HOURS  REMAIN  TIME  LV EXP  ENTRY TRFR FM/TO OTHR JOB  LEAVE   ADV    LOST   DATE   DATE   COMMENTS ? ?           </pre>	
<p>3. On a new line key the following information:</p> <ul style="list-style-type: none"> <li>? : A</li> <li>ADJ/TRFR: F (from clearing account) or T (to clearing account)</li> <li>CLR ACT/OTHER JOB: C</li> <li>HOURS LEAVE: # to transfer, ##.##</li> <li>COMMENTS: to create an audit trail, 12 characters</li> </ul>	<p>If transferring from the clearing account, use a sign to increase the balance.</p> <p>If transferring to the clearing account, use a sign to decrease the balance.</p>

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## NOTES

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### <32 REGULAR PAID HOURS

Most benefit packages require that an employee have at least 32 regular paid hours in a month to be eligible for sick and vacation leave accruals for that month. LARS determines whether to accrue leave by using the following criteria:

If the employee has <32 regular paid hours, LARS **will not accrue** leave if:

- The employee has a separation date and reason code (SEPARATION DT/REASON) on the P030 Job Status Data screen that does not equal 80 (transfer); or
- The employee has a leave of absence code with a beginning date in the current or a prior pay period, and a blank end date or an end date in the current or a future pay period (LOA BEG DT/CD/END on the P030 screen).

If the employee has <32 regular paid hours, LARS **will accrue** leave if:

- The employee has a benefit package code (BENEFIT PKG CD) of CU, XX, YM, YN, YP or YS; **or**
- The employee has a separation reason code (SEPARATION DT/REASON) of 80 (transfer) on the P030; **or**
- The employee does not have either a separation code or a leave of absence code on the P030 screen

If the employee has <32 regular paid hours and LARS accrues leave, you will see the message "LESS THAN 32 HRS AND ACCL" on the B470C, B470D and B470S Leave Accrual Registers. Check the applicable statewide policy or CBA to ensure the employee is eligible for the accrual. If not, adjust the leave on the P435 screen. See Reports below and Entries, Adjust Leave above.

### COMPENSATORY AND STRAIGHT TIME ACCRUED

The following govern overtime and compensatory time:

- U.S. Fair Labor Standards Act (FLSA)
- Oregon Wage and Hour Laws (ORS Chapters 651-653 and OAR Chapter 839)
- State HR Policy 20.005.20 Fair Labor Standards Act
- Collective Bargaining Agreements

The FLSA defines the criteria for determining if a position is exempt or non-exempt from overtime requirements. Generally, for non-exempt employees, the FLSA requires that the state pay overtime for hours worked over 40 hours in a week or 80 hours in two weeks.

The FLSA allows governmental employers to give compensatory time off rather than pay overtime. The defined rate is 1.5 hours of comp time for each hour of overtime worked. The FLSA also sets the maximum number of hours of comp time an employee may accrue. State regulations, HR state policy and the employee's CBA may cover accrual, rate and use. The regulation that is the most advantageous to the employee applies.

LARS maintains a record of when employees earn and use overtime or compensatory time. OSPA and LARS use the OSPA PTB1 and PTB2 Payroll Benefit Package Table screens for the business rules from the governing documents that apply to a given benefit package.

## **FLSA Non-exempt**

When FLSA Non-exempt employees work overtime, they record their time as either overtime or accrued compensatory time. Under the FLSA, they receive 1.5 hours of overtime pay or accrued comp time for each hour of overtime worked. LARS maintains the CT balance and reduces it whenever the employee records comp time taken.

Employees may take accrued compensatory time off in the same pay period in which they accrue it. After leave accruals, the B470C, B470D and B470S Leave Accrual Registers may have CT with a small negative balance because of rounding differences. See Notes, Negative Accrued Leave Balances below.

## **Compensatory Time Pay-off**

Accrued compensatory time represents hours already worked. Non-exempt employees are entitled to a pay-off if the employer does not grant time-off to use the accrued comp time. In addition to the FLSA, the employee's bargaining agreement or applicable statewide policy may govern the amount and the circumstances under which an employee may receive a comp time pay-off. The provision that is the most advantageous to the employee will prevail.

Enter a comp time pay-off on the P050 Gross Pay Adjustments on File screen. Use the pay type CTP -- Payoff of compensatory time when the employee:

- Has a CT balance that exceeds the maximum hours allowed (see Maximum CT Allowed below) or will expire under CBA/State Policy (see Fiscal Year-end below)
- Separates from state service
- Transfers to another state agency

See Entries, Pay-off Leave above.

## **Fiscal Year-end**

Some collective bargaining agreements require that the agency pay FLSA non-exempt employees for any existing accrued compensatory time at the end of the fiscal year.

After the March and June leave accrual, LARS prints the E404-09-1 Agency Employees with Leave Type CT report. It lists FLSA non-exempt employees who have accrued compensatory time. See Reports below.

Process a leave pay-off (see Entries, Pay-off Leave above) for the applicable balance if:

- The employee has not used the leave by the end of the fiscal year
- The contract does not allow an employee to carry-over accrued compensatory time to a new fiscal year

## **Maximum CT Allowed**

The FLSA and State HR Policy 20.005.20 Fair Labor Standards Act establish the maximum amount of comp time that an employee may accrue as 480 hours for seasonal workers, fire, police and emergency responders and as 240 hours for all others. The maximum amount for CBA's varies from 80 to 480 hours. For each benefit package, OSPA sets the MAX ALLWD on the PTB1 Payroll Benefit Package Table screen to match the maximum allowed in the applicable law, policy or CBA.

When the monthly leave accrual runs, LARS looks for employees who have a CT balance near the MAX ALLWD for the employee's benefit package. If the employee's balance is close to the maximum allowed, LARS will print "IN DANGER OF LOSING" on the B470C, B470D and B470S Leave Accrual Registers for that month.

If during the leave accrual, LARS finds an employee that has a CT balance above the MAX ALLWD, LARS will reduce the employee's balance to the MAX ALLWD. The amount deducted will appear in the TIME LOST column on the P430 and P435 Employee Leave Data screens. The B470C, B470D and B470S Leave Accrual Registers will also include the deducted amount in the LOST column and COMMENTS will include "LOST LEAVE". In addition, the employee will be on the E404-25-1 Lost Leave Accrual CT Balances report for that month. See Reports below. When the employee has lost leave and is eligible, restore the lost leave and pay it off. See Entries, Restore Lost Leave and Pay Off Leave above.

## **SEIU Represented Employees**

The CO SEIU Represented Employees Benefit Package is an exception to the above process; the CBA contains different maximum amounts for different coalitions. All of them are in the same benefit package. The MAX ALLWD on the PTB1 screen is 240 hours; some of the coalitions have a lower maximum amount. Agencies with SEIU represented employees will need to monitor employees' CT balances outside LARS. You can create a datamart query for CT balances.

## **SEIU Represented FLSA Exempt**

Under Article 32, Section 4 (b) of the SEIU-OPEU Master Bargaining Agreement "employees in positions which have been determined to be executive, administrative or professional as defined by the FLSA and ORS 653.269(5) receive time off for authorized time worked in excess of eight (8) hours per day or forty (40) hours per week at the rate of one (1) hour off for one (1) hour of overtime worked subject to limitations of Articles 32.1-32.5. (See Letter of Agreement in Appendix A.)"

The employee must use this time off within the fiscal year earned or lose it. The agency, at the discretion of management, may carry time earned in the last 90 days into the next fiscal year. If management denies requests for time off to use the accrued leave before the year ends, the agency must pay-off those accrued hours.

The contract requires the state to notify employees 90 days prior to loss. To aid in this process, LARS prints the E475-B OPEU FLSA Exempt Employees with CT/ST Balances report after the March leave accrual, see Reports below. You can also query the OSPA datamart.

LARS does not automatically adjust the balances to zero at the end of the fiscal year. Reduce the leave balance by making a negative entry on the P435 screen (see Entries, Adjust Leave above) if:

- The employee has not used the leave by the end of the fiscal year and
- The agency has not agreed to extend the leave into the next fiscal year

## **CORRECTIONS TO CLOSED PAY PERIODS**

If you make changes to a closed pay period and change the Corr Flag to Y on the P190 Payroll Register Data screen, OSPA will recalculate that pay period for the employee. LARS will adjust the employee's leave usage, accruals and balances for the pay period if any of the following conditions exist:

- The recalculation results in a change to the employee's pay
- The employee's total hours changed
- A leave related element changed on the Payroll Benefit Package Table (the PTB1 and PTB2 screens)

These changes will be on the E461-01 Leave Adjustments Made to Closed Periods report. Check the adjustments to ensure that LARS has calculated the adjustment correctly. If it has not, make any necessary adjustments on the P435 Employee Leave Data screen.

If the corrective does not change any of the elements above for the closed pay period, LARS will not update the leave accrual and/or usage records. If the corrective payroll should include an adjustment to the employee's leave, make manual adjustment(s) to the employee's leave balances on the P435 screen.

See Entries, Adjust Leave above.

## **DONATED HARDSHIP LEAVE PROGRAM**

Employees may exhaust their accumulated leave because of their own or a family member's health condition. State HR Policy 60.025.01 "Donated Leave" and collective bargaining agreements (CBA) give the framework for state agencies to create donated hardship leave programs. Through these programs, agencies can replace income and potentially continue benefits for qualifying employees. In designing programs, agencies must comply with state HR policy 60.025.01 Donated Leave or the CBA that covers the employee. They must also comply with PEBB eligibility rules (OAR 101-010-0005).

When an eligible employee receives donated hardship leave, agency payroll:

- Uses the OSPA Donated Hardship Leave Worksheet, <http://oregon.gov/DAS/SCD/OSPS/docs/processtools/hardship.xls>, to convert the donated leave to dollars and leave hours
- For employees who donate leave, reduces their VA or CT balances on the P435 Employee Leave Data screen
- For the employee who receives donated leave, creates the DH leave type and then adds the number of hours donated on the P435 screen
- Records the DH taken on the P003 or P004 Time Capture screen. These entries will reduce the balance on the P435 and P430 Employee Leave Data screens.

Do not add more DH hours than the employee will use. (**Note:** some CBAs allow the employee to keep a bank of donated leave hours.) OSPA / LARS edits will prevent a negative balance. The hours will remain on the P435 screen until the employee uses them or payroll adjusts the balance to zero.

The DH balance will not be on employee pay stubs. It will be on the following reports (see Reports below):

- E512A, E512C FMLA/OFLA Leave Hours, if the DH entry includes a FMLA or OFLA special designator
- E460 Leave Accrual – Adjustments and Transfers
- B470C, B470CM, B470D, B470S Leave Accrual Register
- E492 Terminated Employees Having Leave Balances

See Entries, Add a New Leave Type and Adjust Leave Hours above and the OSPA Reference Manual, Handbooks, Donated Hardship Leave.

## **FURLOUGH OBLIGATION**

For the 2009-11 biennium, most state employees are required to take a set number of unpaid furlough hours during the biennium. Collective bargaining agreements (CBA) and HR State Policy govern the number of hours and business rules for taking the unpaid leave.

### **Accrual Process**

As each CBA became final for the 2009-11 biennium, LARS accrued the furlough obligation for each affected employee covered under the CBA. Throughout the biennium, it will also accrue an LA balance for new hires; see New Hires below.

CBA's and HR State policy set the business rules for covered employees. LARS uses the following to define an individual employee's furlough obligation:

- PERSONNEL BASE RATE \* PT-FT PCT on the P030 Job Status Data screen defines the employee's furlough tier
- The ACCR RATE for the corresponding FURLOUGH LV# (tier) on the PTB1 Payroll Benefit Package Table screen defines the furlough obligation for a full-time employee in that tier
- LARS then calculates the individual employee's obligation with the following formula:

$$\text{ACCR RATE from the PTB1 for the employee's tier} \times \frac{\text{Employee's FT-PT PCT from P030}}{1.00}$$

This means that LARS will pro-rate the amount for employees who are less than full-time.

During the November and March leave accruals in the last fiscal year of the biennium, LARS will review employees with LA balances. The employees' pay stub and the B470C, B470D and B470S Leave Accrual Registers will have the message REVIEW LA OBLIGATION if the employee has a remaining LA balance of 56 hours in November or 32 hours in March. At the end of each biennium, LARS will zero out the balance remaining.

## **Employees on LWOP**

If an employee is on an extended leave of absence, the agency's HR staff may enter an LOA DATE / CD in the PPDB, which displays on the P030 Job Status Data screen. If the LOA code is for an unpaid leave of absence and the END date on the P030 is blank or in a future month, OSPA will not allow the LA pay type on the P003 or P004 Time Capture screen for the employee. If the LOA code is for a paid leave of absence, you can enter the LA on the time screens.

If the employee would have had a mandatory furlough day and/or had a prior approved floating furlough day during the leave of absence, the employee may have his furlough obligation reduced for the day(s). Make the following entry on the P050 Gross Pay Adjustments on File screen to adjust the employee's furlough obligation (see Entries, Pay-off Leave above for examples):

- **?:** A
- **PAY TYP:** LA
- **ADJ TYP:** allow to default to A
- **RATE:** allow to default to .00
- **UNITS:** number of hours of LA the employee would have taken
- **COMMENT:** audit trail, 12 alphanumeric characters

The entry on the P050 screen will reduce the employee's furlough obligation on the P435 screen. It will also be included in management reports that track cost reductions realized through furloughs. Adjustments made directly on the P435 screen are not included in the reports.

## **Excess Vacation Leave Account (VF)**

In the 2007-09 biennium, only Management and Executive Service employees had a furlough obligation. During that biennium, the MAX ALLWD on the PTB1 screen for VA for these employees increased to 425 hours. On January 1, 2010, the MAX ALLWD returned to 350 hours. For those employees who had >350 hours of VA when the December leave accrual ran, LARS moved the hours >350 into an Excess Vacation Leave Account. Employees have until June 30, 2013 to use this leave. It does not have a cash value and is not compensable upon transfer or separation. Between January 13, 2010 and June 30, 2013, record the use of Excess Vacation Leave with pay type VF.

If an employee with a VF balance moves from management or executive service prior to June 30, 2013, the employee is entitled to use the remaining VF balance in the new position. Agency payroll may need to ask OSPS to add the VF pay code to the PTB2 screen for the employee's benefit package.

If an employee with a VF balance transfers to another state agency, tell the gaining agency the number of hours remaining. Then, adjust the VF balance for your agency to zero. The gaining agency will establish the leave balance in the new agency. Agency payroll may need to ask OSPS to add the VF pay code to the PTB2 screen for the employee's benefit package. See Entries, Add a New Leave Type and Adjust Leave Hours above.

If an employee wishes to donate excess vacation to the Military Donated Leave Program, see Notes, Military Donated Leave Program. If an employee wishes to donate it for Hardship Leave, see the OSPA Reference Manual, Handbooks, Donated Hardship Leave.

## **Forecast and Timesheets**

Agencies may choose to have OSPA forecast the mandatory furlough days for the P003 and P004 Time Capture screens and printed timesheets.

OSPA uses the HOLIDAY PKG CD on the P030 Job Status Data screen to identify the employees who will have forecasted LA. Possible values on the P030 screen include:

- A = Actual holidays, no furloughs forecasted
- D = School for the Deaf, observed holidays, mandatory furloughs forecasted
- E = Oregon Education Association, observed holidays (no 4<sup>th</sup> of July), mandatory furloughs forecasted
- G = Observed holidays, no furloughs forecasted
- H = Student Assistance Commission and PERS, observed holidays, mandatory furloughs forecasted
- N = No holidays, no furloughs forecasted
- O = Observed holidays, mandatory furloughs forecasted
- Z = Lottery, observed holidays, mandatory furloughs forecasted

## **FLSA Overtime Exempt Employees**

FLSA exempt employees who take mandatory furlough days become FLSA non-exempt, overtime eligible employees in the week in which they take the furlough day.

If an employee works between 33 and 40 hours in a furlough week, s/he is compensable at straight time for the hours worked >32 and <41. Use pay code FST Straight Time with LA to record the hours worked.

If the employee works more than 40 hours in the week, the employee is entitled to overtime pay or accrued compensatory time under State HR Policy 20.005.20 Fair Labor Standards Act for the hours >40 worked. These employees have O-T: N on the P030 Job Status Data Screen. For their benefit packages, pay codes CTA and OT have O/T ELG: Y on the PTB2 Payroll Benefit Package Table screen. With these settings, OSPA edits will not allow the entry of CTA or OT on the P003 or P004 Time Capture screens for exempt employees. As a work around, enter the CTA or OT hours on the P050 Gross Pay Adjustments on File screen.

- For UNITS multiply the hours worked by 1.5
- For CTA, enter 0.0 for RATE. OSPA will record a CT balance on the P430 Employee Leave Data screen.
- For the RATE for OT, see the OSPA Reference Manual, Introduction, Payroll Calculation for instructions on calculating the overtime rate.

## **New Hires**

During the monthly leave accrual process, LARS looks for new hires agency HR has entered in the PPDB since the last leave accrual. It uses the DAS HRSD Furlough Obligation Chart, <http://www.oregon.gov/DAS/HR/Reductions.shtml> to pro-rate the employee's remaining furlough obligation.

The P430 screen will not include the furlough obligation for a new employee until the leave accrual process runs after payroll run 2 for the employee's first month of employment. If the employee needs to take a mandatory furlough day prior to the leave accrual, LARS will accept a negative LA balance. When the accrual runs, LARS will subtract the negative leave taken from the accrual.

**CAUTION:** If agency payroll makes any manual adjustments to furlough on the P435 screen prior to the first leave accrual, LARS will not accrue the LA obligation.

## **Part-time and Job Share Employees**

Part-time and job share employees have a pro-rated furlough obligation based upon their regularly scheduled hours. OSPA will use the PT-FT PCT \* PERSONNEL BASE RATE on the P030 screen to pro-rate the obligation. Agency payroll will need to modify the obligation if the employee works more or less than the regularly scheduled hours. See DAS HRSD Cost Reduction Frequently Asked Questions, <http://www.oregon.gov/DAS/HR/Reductions.shtml>

Monitor new employees to make sure LARS pro-rated the beginning balance correctly. If needed, make adjustments on the P435 screen. See Entries, Adjust Leave above.

## **Pay Types**

Primarily, employees record their furlough days with pay type LA Furlough Lv. It is included in the employee's regular hours, which has the following affects:

- When entering LA on the P003 or P004 Time Capture screens, include the hours in the total reg field, rather than the lwop field
- LARS includes the LA hours in the leave accrual calculation
- OSPA does not include it in the calculation of PERS subject hours
- It does not affect the employee's eligibility for PEBB core benefits or increase the employee's out-of-pocket costs for PEBB benefits
- If the employee takes LA before or after a holiday, it does not affect the employee's eligibility for the paid holiday

Additional furlough related pay types include:

- FST Straight Time with LA – This pay type is used to report hours worked in excess of 32 but less than 41 in a week where there is a furlough day
- LAH Furlough Hol – This pay type is limited to SEIU represented employees in benefit package NS and AFSCME represented employees in benefit package CS. These employees use it for a holiday that falls on a day that the employee is not scheduled to work. Prior, OSPA would automatically give these employees CTS or CPH for this time.
- LZ Vol Furlough – This pay type is limited to employees in the XX Executive and Management Service benefit package. Employees use it to record additional voluntary furlough days. The pay type does not draw down the LA Furlough Obligation balance.
- OTM Overtime Mandatory – This pay type is limited to employees in agency 29100 to track overtime related to furloughs

## **Seasonal Employees**

LARS will not calculate furlough obligations for seasonal employees. Agency payroll will need to calculate their furlough obligation manually. See DAS HRSD Cost Reduction Frequently Asked Questions, <http://www.oregon.gov/DAS/HR/Reductions.shtml>

## **Separating Employees**

Employees who separate with notice should satisfy their fixed and floating furlough dates scheduled and occurring prior to their separation date. See the DAS HRSD Furlough Obligation Chart, <http://www.oregon.gov/DAS/HR/Reductions.shtml> for separating employees' obligation.

When you process the employee's final pay, zero out the remaining furlough obligation.

## **Temporary Employees**

Temporary employees will be unscheduled for their furlough obligation. They will not enter LA days in OSPA. Agencies must track their furlough days outside OSPA.

## **Transfers**

When an employee transfers to another state agency, the losing agency will transfer the employee's LA balance to the clearing account, even if it is 0.0.

LARS does not load an LA balance for an employee who transfers into a new agency. For the gaining agency, carefully evaluate the employee's furlough obligation. The employee's furlough obligation from the losing agency reflects the employee's base salary and full-time / part-time status with that agency. The obligation may be different for the gaining agency. Once you have calculated the correct obligation for your agency, make adjustments on the P435 screen to reflect the employee's current obligation and furlough time already taken in the losing agency.

See the OSPA Reference Manual, Recommended Practices, Transfers, and Entries, Transfer Leave To or From the Clearing Account above.

## **LEAVE EXPIRATION DATE ON THE P435**

When transferring leave to the clearing account, LARS will require a date in the LV EXP DATE field on the P435 screen. The leave accrual process will delete any remaining balance in the clearing account on the expiration date.

When you transfer leave, use the following guidelines for setting the LV EXP DATE:

- **Furlough Obligation** – Enter an expiration date for the end of the current biennium (June 30 of an odd-numbered year)

- **Personal Business Leave** -- Enter an expiration date of June 30 of the current fiscal year (July 1 to June 30)
- **Sick Leave** -- If the separating or transferring employee is not retiring, transfer sick leave to the clearing account with an expiration date two years in the future. If the employee returns to state service within the two-year period, the hiring agency should restore the leave to the employee.

Under OAR 459-017-0060(14), employees who retire from state service are not eligible to have their sick leave restored. PERS will use it in calculating the employee's retirement benefit. For retirees, enter an expiration date of 60 days in the future.

For deceased employees, PERS will use the sick leave balance to calculate the death benefits. Transfer the sick leave to the clearing account with an expiration date 60 days in the future.

- **Vacation Leave** – For transferring employees, transfer the amount of VA the gaining agency has agreed to take to the clearing account with a two-year expiration date.

For classified unrepresented, management service, unclassified executive service and unclassified unrepresented employees who separate during trial service, DAS Policy 60.000.05 allows agencies to reinstate accrued vacation if the employee returns within two years. Transfer their vacation leave to the clearing account with an expiration date of two years.

For other separating employees who are still on trial service, DAS Labor Relations has provided guidance that employees terminated during initial trial service forfeit all claim to accumulated vacation hours. For these employees, adjust their vacation balances to zero; do not move them to the clearing account.

## **MILITARY DONATED LEAVE PROGRAM (MDLP)**

For employees who are on an unpaid military leave of absence for military active duty, the state supports a Military Donated Leave Program (MDLP). State employees may donate vacation or compensatory time to the program. An employee who is on LWOP while on active military duty may apply to the program to have their military salary supplemented.

When an employee donates accrued vacation leave to the MDLP, reduce the employee's leave balance and convert the leave hours to dollars by making an entry on the P050 Gross Pay Adjustments on File screen with pay type VAM. Use RATE (employees EQUIVALENT RATE from the P030 screen) and UNITS (number of donated hours). This transaction will reduce the employee's VA hours on the P430 and P435 screens.

Between January 15, 2010 and June 30, 2013, Management and Executive Service employees who have an excess vacation leave account because of a furlough obligation during the 2007-09 biennium may donate excess vacation leave to the MDLP. If the employee donates excess vacation leave, first make the P050 entry with VAM, RATES and UNITS. Then make two entries on the P435 screen. For leave type VF, reduce the balance by the number of hours donated. For leave type VA, increase the balance by the number of hours donated.

If the employee donates compensatory time to the MDLP, use pay type CTM Military Donated Leave on the P050 screen to reduce the employee's CT leave balance and convert the leave hours to dollars. Enter RATES and UNITS, like the VAM entries.

See State HR Policy 60.020.05 Military Donated Leave Program and the OSPA Reference Manual, Handbooks, Military Leave of Absence.

## **NEGATIVE ACCRUED LEAVE**

Employees normally will have a positive balance for accrued leave. Some circumstances may create a negative balance. Some of the reasons for a negative balance include:

- A new employee took a mandatory furlough day before leave accruals ran for the employee's first month of employment.
- An employee has taken more LA leave than the employee's furlough obligation. (Because new employees can have a negative balance for a mandatory furlough in the first month of employment, the application will allow a negative balance for all employees.)
- The employee used CT in the same month it accrued and the leave accrual process rounded the 1.5 accrual rate differently.
- The agency made a P050 entry in the same month that the employee used the leave. The time capture screens do not recognize entries on the P050 screen when calculating the available balance.
- The agency set a corrective that changed the leave accrual balance in the same pay period that the employee took leave or the agency made a P050 or P435 entry.

The B470C, B470D and B470S Leave Accrual Registers will include the COMMENT: NEGATIVE BALANCE. The next time the employee receives an accrual for the leave type, LARS will subtract the negative balance from the accrual.

## **NON-ACCRUED LEAVE ADJUSTMENTS**

Once a year and at the end of the biennium, LARS adjusts some non-accrued leave balances to zero.

It adjusts the following leave types to zero once a year. The PTB1 MON field determines the month.

- Administrative Leave (XT) for Department of Justice and State Police
- Bereavement leave (FL)
- Discretionary leave (DL)
- Governor's leave (GL)
- Judicial and Legislative administrative leave (AD)
- Military leave (ML)

LARS adjusts the following leave types to zero at the end of each biennium:

- Education leave (EL)
- Furlough obligation (LA)
- Interview and Test (IT)
- Jury Duty (JD)
- Kelly Leave (KL)
- LWOP education (LE)

- LWOP suspended (LF)
- LWOP workers compensation time loss (LG)
- LWOP other (LO)
- LWOP sick leave (LS)
- LWOP unexcused absence (LU)
- LWOP vacation leave (LV)
- LWOP military duty (LX)
- Miscellaneous paid leave (MPL)
- OSPOA Association business (ABL)
- Relocation leave (RL)
- Union business (UBP)

Unless manually adjusted, pre-retirement leave (PR) will remain permanently with the employee's record.

## **PERSONAL BUSINESS**

Eligible employees receive a set number of personal business hours each fiscal year. Bargaining agreements and statewide policy determine the eligible employees and the number of hours.

### **Annual Accrual Process**

During June leave accruals, LARS zeroes out existing balances for the ending fiscal year. It also gives eligible salaried employees a new balance for the new fiscal year. Agency payroll will need to check eligible non-salaried employees for the PB accrual and may need to adjust the balance manually on the P435 Employee Leave Data screen (see Entries, Adjust Leave Hours above).

The formula to calculate the amount of PB to accrue for each employee for the fiscal year is:

$$\text{ACCR RATE for PB from the PTB1 screen} \times \frac{\text{Employee's FT-PT PCT from P030}}{1.00}$$

This means that employees who are less than full-time will receive a pro-rated amount.

Starting with the April leave accrual, OSPA prints "IN DANGER OF LOSING" messages on pay stubs and the B470C, B470D and B470S Leave Accrual Registers for employees who still have a PB balance.

The employee cannot carry the balance into the next year and PB does not have a cash value.

### **New Hires**

During the monthly leave accrual process, LARS looks for new employees HR has entered in the PPDB since the last leave accrual. If the employee will be eligible to use PB before June 30, LARS will give the employee the balance the employee would have received at the beginning of the fiscal year.

On the PTB1 Payroll Benefit Package Table screen, PB has WAIT: 05. For new employees, the wait period is six months from the actual recognized service date. Because OSPA edits by full month, OSPS sets the WAIT to 05 to allow an employee to use the PB six months after the employee's recognized service date. Until the employee is eligible, the employee's pay stub and the B470C, B470D and B470S Leave Accrual Registers will have the message NOT YET USABLE.

## **Part-time and Job Share Employees**

Salaried part-time and job share employees receive a pro-rated amount of personal business based upon the PT-FT CD/PCT on the P030 screen. Monitor new employees to make sure LARS pro-rated the beginning balance correctly. In addition, at the beginning of the fiscal year, check the June B470C, B470D and B470S Leave Accrual Registers for job share and part-time employees to make sure LARS pro-rated the PB correctly. If needed, make adjustments on the P435 screen. See Entries, Adjust Leave above.

## **Transfers**

During the monthly leave accrual process, LARS looks for eligible employees who do not have a PB balance. At the time of the accrual, employees who transfer from one agency to another may not yet have leave transferred from the clearing account. For those employees, LARS will give them the PB balance they would have received at the beginning of the fiscal year. If the transferring employee used personal business while working at the losing agency, the employee is not eligible for the full balance.

The losing agency will transfer the PB balance (even if 0.0) to the clearing account. The gaining agency will transfer the balance from the clearing account, even if 0.0. (If LARS finds any balance, including 0.0, during leave accrual, it will not give the employee a new balance.) The gaining agency will also want to monitor the PB balance after the leave accrual process runs and make any necessary adjustments on the P435 screen. See the OSPA Reference Manual, Recommended Practices, Transfers and Entries, Transfer Leave To and From the Clearing Account above.

## **SICK LEAVE**

LARS accrues sick leave for eligible employees monthly. LARS uses the following formula to calculate the amount of SL to accrue for eligible employees:

$$\text{ACCR RATE for SL from the PTB1 screen} \times \frac{\text{Employee's regular paid hours for the month}}{\text{F-T hours for month for employee's schedule}}$$

Currently, LARS will not accrue more than eight hours of sick leave per month.

## VACATION LEAVE

### Accrual Rate

LARS adds vacation leave for eligible employees monthly. Bargaining agreements and statewide policy determine the eligible employees and the number of hours. LARS uses the following to define an individual employee's vacation accrual rate:

- LEAVE ACCRUAL SVC CD on the P030 Job Status Data screen (see below)
- The ACCR RATE for the corresponding VACATION-### (### = LASC from the P030 screen) on the PTB1 Payroll Benefit Package Table screen
- LARS then calculates the individual employee's obligation with the following formula:

$$\text{ACCR RATE for VA-# on the PTB1 screen} \times \frac{\text{Employee's regular paid hours for the month}}{\text{F-T hours for month for employee's schedule}}$$

This means that LARS will pro-rate the amount for employees who have less than the full-time equivalent of regular paid hours for the month.

Several CBA's provide that employees will receive additional vacation hours in a specific month each year. To grant the additional hours, OSPS changes the ACCR RATE on the PTB1 screen for that month. After the accrual process for that month, OSPS restores the ACCR RATE on the PTB1.

Temporary employees, elected officials, board and commission members and contractors are not eligible for vacation accrual; they will have an LEAVE ACCRUAL SVC CD: N on the P030 screen.

### **Leave Accrual Service Code (LASC)**

The LASC comes from the Position and Personnel Database (the PPDB). The P030 Job Status Data screen (LEAVE ACCRUAL SVC CD) and the P430 and P435 Employee Leave Data (SVC CD) screens display the employee's LASC in OSPA.

The PPDB Automated Step Increase (ASI) program automatically sets and updates the LASC for eligible employees each month. The PPDB prints a monthly audit report that lists employees who are eligible for a new LASC. Agencies review the report and may override the ASI update.

If agency staff does not override the update, the third working day of the following month, ASI will update the LASC for the eligible employees on the prior month's audit report. The LASC change interfaces to the P030 screen in OSPA with Personnel Action Code 232 Service Related Data Change or 237 Comp Related Data Change. It will create a new job segment in OSPA.

For most benefit packages, the change will be effective on the first of the prior month. LARS will use the new LASC when it accrues vacation leave after run 2 final for the effective month.

There are a few benefit packages where the effective date will coincide with the employee's RECOG SVC DT on the P030 screen, which means changes may be effective anytime during the prior month. If the LASC changed on a date other than the first of the month, LARS will pro-rate the accrual.

Here is an example of how LARS will pro-rate the accrual:

- An employee's LASC changed from 1 to 2 on the 15<sup>th</sup> of the month.

- For the employee's benefit package, the accrual rates are: LASC 1 = 8 hours per month, LASC 2 = 10 hours
- The full-time employee worked 80 hours between the 1<sup>st</sup> and 14<sup>th</sup> of the month and 96 hours between the 15<sup>th</sup> and 31<sup>st</sup>.
- The full-time hours for the month for the employee's schedule = 176 hours.
- LARS will accrue 9.09 hours of leave using the following formula:

$$8 \text{ hrs / mo} \times \frac{80 \text{ hrs}}{176} = 3.64 \text{ hrs}$$

$$10 \text{ hrs / mo} \times \frac{96 \text{ hrs}}{176} = 5.45 \text{ hrs}$$

The B470C, B470D and B470S Leave Accrual Register will include both of the formulas in the COMMENTS column (BASIS=##.## X ###.##/###.##).

When you are manually accruing leave for an employee, you need to use the LASC that is in effect during the applicable month(s). If an employee's LASC changes during the month, you will prorate the hours worked under each LASC.

If the employee's LASC changes in the employee's final month of employment, you may not know about the change until leave accruals process after final run 2 for that month. In that case, the employee will be on the E492 Terminated Employees Having Leave Balances report. In addition, the B470C, B470D and B470S Leave Accrual – Detail Transaction Register will have the message "SEPARATED EMPLOYEE HAS LEAVE BALANCE." See Reports below.

## **Maximum VA Allowed**

State HR Policy 60.000.05 Vacation Leave and CBA's limit the amount of vacation leave that an employee may accumulate. For each benefit package, OSPA sets the MAX ALLWD on the PTB1 Payroll Benefit Package Table screen to match the maximum allowed in the applicable policy or CBA.

When the monthly leave accrual runs, LARS looks for employees who have a VA balance near the MAX ALLWD for the employee's benefit package. If the employee's balance is close to the maximum allowed, LARS will print "IN DANGER OF LOSING" on the B470C, B470D and B470S Leave Accrual Registers for that month.

If during the leave accrual, LARS finds an employee that has a VA balance above the MAX ALLWD, LARS will reduce the employee's balance to the MAX ALLWD. The amount deducted will appear in the TIME LOST column on the P430 and P435 Employee Leave Data screens. The B470C, B470D and B470S Leave Accrual Registers will also include the deducted amount in the LOST column and COMMENTS will include "LOST LEAVE". The lost leave does not have a cash value and is not restored.

Because of furlough obligations during the 2007-09 biennium, management and executive service employees may have a VF Excess Vacation balance. This balance is not part of the maximum VA calculation. See Furlough Obligation, Excess Vacation Leave Account above.

## Vacation Pay-off

The employee's bargaining agreement / benefit package or applicable statewide policy governs the amount and the circumstances under which an employee may receive a vacation leave pay-off.

To pay-off an employee, agency payroll will make an entry on the P050 Gross Pay Adjustments on File screen. Possible pay types for the P050 pay-off include:

- VAP -- Payoff of accrued vacation time upon termination or per specific contract language. Paid at the equivalent hourly rate. 250 maximum payoff hours allowed. Use VAP prior to using VAQ or VAL.
- VAQ -- Used in conjunction with VAP to pay vacation hours above 250 when allowed per CBA or agency policy for Lottery, Judicial, Legislative Branch, Firefighter and AEE benefit packages. 100 maximum payoff hours allowed.
- VAL -- Payoff of accrued vacation time for firefighters at termination or per specific contract language. Paid at the equivalent hourly rate. 274 maximum payoff hours allowed. Use VAP and VAQ prior to using VAL.

**REMINDER:** OSPS will not write a manual or off-cycle check to pay-off vacation leave for a current employee. Make the P050 entry and allow it to process through a normal payroll run.

After the employee's separation date on the P030, you will not be able to make a P050 entry to pay-off a leave balance. You can request that OSPS make the entry.

See Entries, Pay-off Leave above and the OSPA Reference Manual, Recommended Practices, Manual Checks, Separations and Transfers.

## HELP / TROUBLESHOOTING

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## SCREENS

See the OSPA Reference Manual, Screen Descriptions for additional information.

**P003 Time Capture**-- Agency payroll or timekeepers use the P003 Time Capture screen to enter time. The screen summarizes an employee's time for a pay period by pay type and work charge code. It is employee, agency, concurrent job, job segment and pay period specific.

Hard coding in OSPA prevents an employee in one of the following agencies from entering more than 80 hours of CTA on the P003 screen in one month. If you try to enter more than 80 hours, you will receive the screen message TC54.

- 10000 Department of Human Services
- 29100 Department of Corrections
- 60300 Department of Agriculture

- 62900 Department of Forestry

The employee's leave balances display at the bottom of the screen. They do not reflect entries made on the P050 screen since the last leave accrual.

**P004 Time Capture**—Employees who are on on-line daily time (ODT) use the P004 Time Capture screen to enter their time on a daily basis. The employee's leave balances display at the bottom of the screen. They do not reflect entries made on the P050 screen since the last leave accrual.

**P030 Job Status Data** – Agency Human Resource staff enters several elements in the PPDB that impact leave accrual and usage. These elements display on the OSPA P030 Job Status Data screen. They include:

- **PT-FT CD/PCT:** used in pro-rating LA and PB accrual rates for part-time employees and LA, PB, SL and VA for job share employees
- **EMP REPR:** determines the benefit package code
- **BENEFIT PKG CD:** determines the leave types available to the employee and the business rules that apply to them, see the OSPA Reference Manual, Codes, Benefit Package Codes
- **PERSONNEL BASE RATE:** determines the tier LARS will use to accrue the employee's furlough obligation
- **HOLIDAY PKG CD:** defines the employee's holidays and furlough days and whether OSPA will include the mandatory LA hours in the forecast
- **LEAVE ACCRUAL SVC CD:** determines the employee's vacation accrual rate
- **RECOG SVC DT:** indicates if an employee has had a break in service and impacts the Leave Accrual Service Code (LASC)

**P050 Gross Pay Adjustments on File** – Entries on the P050 screen add or subtract from the employee's gross pay. When you save a leave pay-off transaction on the P050 screen, OSPA creates a transaction on the P435 screen. If you enter RATE and UNITS on the P050, the transaction will change the current balance on the P430 and P435 screens. The COMMENTS field on the P435 screen will be GR PAY ADJ. P050 entries do not change the leave balances on the P003 and P004 Time Capture screens. See Entries, Pay-off Leave above.

**P370 Calculation of Current Payoff** -- The P370 is an inquiry only screen that shows the results of an on-line calculation from entries made after the last final payroll run. The P050 entry to pay-off leave will display under INCOME TYPE on the inquiry.

**P420 Leave Clearing Account Balances** -- We use the leave clearing account to store furlough obligation (LA), military (ML), personal business (PB), pre-retirement (PR), sick (SL) and vacation (VA) leave balances for transferring and separating employees. Leave balances will remain in the clearing account until an agency transfers them out or they expire (LV EXP DATE). The B470C, B470D and B470S Leave Accrual Register will include CLEARING ACCOUNT HAS NON ZERO BALANCE in the COMMENTS column. The P420 screen is not limited by agency, CCJ or leave type.

For transferring employees, the losing agency transfers the leave balances to the clearing account. Then, the gaining agency can pick them up for the employee to use in the new agency. See the OSPA Reference Manual, Recommended Practices, Transfers.

When an employee leaves state service, the employee may be eligible to have some leave balances restored if the employee returns to state service within a given time. When the employee separates, the losing agency places the leave balances in the clearing account with an expiration

date. If an agency rehires the employee, that agency can pick-up the unexpired balances. See the OSPA Reference Manual, Recommended Practices, Separations.

When an employee retires from state service or passes away, we transfer SL to the clearing account and report the balance to PERS. For retirees, PERS uses the employee's SL balance to calculate retirement benefits; the employee is not eligible to have the SL balance restored if s/he returns to state service.

See Notes, Leave Expiration Date on the P435 above.

**P430 Employee Leave Data** – The P430 screen summarizes the employee's current leave balances. The P430 screen is agency and CCJ specific. Entries on the time capture (P003 or P004), P435 and P050 screens update the P430 screen when you successfully save the transaction.

If DATA IN LEAVE CLEARING ACCOUNT = Y on the P430 screen, the employee has a balance on the P420 Leave Clearing Account screen.

**P435 Employee Leave Data** - The P435 screen displays entries for a specific leave type made since the last leave accrual. The entries may come from the P003 and P004 Time Capture and the P050 Gross Pay Adjustments on File screens. Agency payroll can also make manual leave adjustments on the P435 screen. During the next leave accrual, LARS will post the listed transactions to the database tables and delete them from the P435 screen.

**PTB1 Payroll Benefit Table** – The Payroll Benefit Package Table (entered on the ADB1 screen and displayed on the PTB1 screen) establishes controls for leave entered in OSPA and accrued and reported in LARS. It controls the following:

- Accrual rate
- Maximum amount that the employee may accrue
- Month leave will accrue (if other than monthly)
- Maximum amount of the leave an employee may use
- Number of months that a new employee must wait before using a specific leave type

Laws and regulations, collective bargaining agreements (CBA) and statewide policy define these controls.

**PTB2 Payroll Benefit Table** – The Payroll Benefit Package Table (entered on the ADB2 screen and displayed on the PTB2 screen) lists all pay and leave codes for a given benefit package. An employee may only use the leave codes included in his/her benefit package.

Leave types (LV TP) on the PTB2 screen include:

- A = accrued leave
- N = not a leave code
- P = paid leave
- U = unpaid leave, does not count as time worked
- W = unpaid leave, counts as time worked

## FORMS

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DAS HRSD has developed the following forms / worksheets to aid agencies in scheduling and tracking furlough obligations, <http://www.oregon.gov/DAS/HR/Reductions.shtml>

- Employee Furlough Election Form, September 2009 to June 30, 2011
- Agency Reporting Form, Report of Unscheduled Hours Assigned to Temporary Employees

## REPORTS

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For additional information on these reports, see the OSPA Reference Manual, Report Descriptions.

**E404-09-1 Agency Employees with Leave Type CT** – LARS produces this report after leave accrual for March and June. It lists employees who have accrued compensatory time and who may be in danger of losing it at the end of the fiscal year. The employee may be eligible for a pay-off.

**E122-077-01, E122-077-02 Employee Furlough Leave Used** - For the 2007-09 and 2009-11 biennia, state employees may be required to take a defined number of unpaid furlough days (a furlough day = 8 hr. \* the employee's PT-FT PCT from the P030 Job Status Data screen). These reports give a cumulative number of hours of furlough obligation each employee has taken for the biennium. Managers can use the reports to help ensure employees have taken the required number of days.

**B075B Gross Pay Adjustments** – The report prints after each final payroll run. It lists the P050 entries for the current payroll run, including leave payoffs. The Oregon Accounting Manual (OAM) 45.35.00.PO and 45.35.00.PR Review of Gross Pay Adjustments Report require that a manager outside of payroll review the report each payroll run, prior to releasing checks and pay stubs.

**E260-100 Gross Pay Over 2.0 x Ajd Base Exception Report** – OSPS receives this report after each final payroll run. It lists employees that have gross pay for the pay period that is at least two times their ADJUSTED BASE on the P030 Job Status Data screen. If the employee receives pay for a large number of leave hours, the employee may be on the report. If OSPS staff cannot determine the reason for the adjustment, they will contact your agency.

**E460 Leave Accrual – Adjustments and Transfers Report** – This report lists manual entries made on the P435 screen since the last leave accrual. It provides an audit trail after the entries have posted to the database and dropped off the P435 screen.

**B470C, B470CM, B470D, B470S Leave Accrual Registers** – LARS produces these reports after each leave accrual. They summarize each employee's leave use and accrual during the pay period, including manual adjustments. Except for the B470CM, the reports include messages, such as:

- When the employee may soon or has exceeded the maximum amount of leave the employee may accrue
- When the employee is in danger of losing leave
- If an employee has separated from the agency and still has leave balances
- The formula LARS used to accrue leave
- If the employee has leave in the clearing account

**E461-01 Leave Adjustments Made to Closed Periods** – An employee will be on this report if you change the Corr Flag to Y on the P190 Payroll Register Data screen and LARS adjusts the

employee's leave usage, accruals and balances for the corrected pay period. Make sure LARS has adjusted the leave when needed and that the adjustments are right. If not, adjust the leave on the P435 Employee Leave Data screen. See Notes, Corrections to Closed Pay Periods above.

**E404-25-1 Lost Leave Accrual CT Balances** – This report lists employees who have exceeded the maximum amount of accrued compensatory time. LARS has reduced the balance to the amount allowed. The employees may be eligible for a pay-off. See Notes, Compensatory and Straight Time Accrued and Entries, Pay-off Leave and Restore Lost Leave above.

**E475-B OPEU FLSA Exempt Employees with CT/ST Balances** – LARS produces this report after the March leave accruals. The SEIU contract requires agencies to notify employees 90 days before the end of the fiscal year. It serves as a notice to SEIU-OPEU FLSA exempt employees and their managers that the employees are in danger of losing CT or ST.

**E492 Terminated Employees Having Leave Balances** – This report includes terminated employees who have leave balances after their separation dates. The report includes CT, LA, ML, PB, PR, SL or VA leave. The remaining balance may be for CUR ACCRUAL BAL or REMAIN ADV on the P430 screen.

Unless the employee was still on trial service, the employee is entitled to receive pay for the remaining balance of VA or CT that you may have missed during the final processing. Your agency may have a policy to write-off small fractions of leave.

If you made adjustments for a separating employee who is on the report, there may have been a rounding difference between your calculations and LARS for the advanced leave. Determine if you need to make entries on the P435 screen to adjust all leave balances to zero.

After leave accruals each month OSPS sends e-mails to the agencies that have employees who have been on the report for three months or more after the separation date.

## CREATING AN AUDIT TRAIL

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## AUTHORITY / REFERENCES

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U.S. Fair Labor Standards Act, <http://www.dol.gov/whd/flsa/>

- Wage and Hour Division, U.S. Department of Labor, Fact Sheet #7: State and Local Governments under the Fair Labor Standards Act (FLSA), <http://www.dol.gov/whd/regs/compliance/whdfs7.pdf>

Oregon Revised Statutes (ORS), <http://www.leg.state.or.us/ors/>

- 238.350 Use of Unused Sick Leave to Increase Retirement Allowance
- 653.268 Overtime for Labor Directly Employed by Public Employers
- 653.269 Exceptions to ORS 653.268

Oregon Administrative Rules (OAR), <http://arcweb.sos.state.or.us/banners/rules.htm>

- 459-017-0060(14) Reemployed Retired Members (PERS), Sick Leave
- Chapter 839 Bureau of Labor and Industries

Oregon Accounting Manual (OAM),

[http://oregon.gov/DAS/SCD/SARS/oam\\_toc.shtml#Chapter 45 Payroll](http://oregon.gov/DAS/SCD/SARS/oam_toc.shtml#Chapter_45_Payroll)

- 45.06.00.PO Sick Leave at Retirement
- 45.35.00.PO and 45.35.00.PR Review of Gross Pay Adjustments Report

HR State Policies, <http://www.oregon.gov/DAS/HR/rules.shtml>

- 20.005.20 Fair Labor Standards Act,
- Division 60 Employee Leave

DAS HRSD Temporary Cost Reduction Directives, <http://www.oregon.gov/DAS/HR/Reductions.shtml>

Bargaining agreements, <http://oregon.gov/DAS/HR/CBAs.shtml>

OSPA Reference Manual, <http://www.oregon.gov/DAS/SCD/OSPS/referencemanual.shtml>

- Codes:
  - Benefit Package Codes
  - Pay and Leave Codes
  - Screen Message Codes
- Handbooks:
  - Donated Hardship Leave
  - Family and Medical Leave
  - Military Leave of Absence
- Recommended Practices:
  - Manual Checks
  - New Employees
  - Separating Employees
  - Transfers
- Report Descriptions
- Screen Descriptions

OSPS Processing Calendar, <http://www.oregon.gov/DAS/SCD/OSPS/processtools.shtml>

## **REVISION HISTORY**

<b>Date</b>	<b>Rev. No.</b>	<b>Modification</b>
12/28/09	1.0	Original
01/25/10	1.1	Non-accrued leave month changes, Family / Medical Leave Handbook
02/08/10	1.2	WR#3646, KL
06/09/10	1.3	VF for transferring employee, accrual rate for PB and LA, balances included on E492
03/10/11	1.4	WR#3737, DH leave type added; WR#3725, .00 balance remains on P420 until transferred or expires; PTB2 LV TYP descriptions clarified; CT MAX ALLWD exceptions; correct Add New Leave Type

<b>Date</b>	<b>Rev. No.</b>	<b>Modification</b>
07/13/11	1.5	Revisions to CT, LA, VA, PB, non-accrued leave, screens, reports, LOA codes, add notes on negative accrued leave

## ***ATTACHMENTS***

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