



HRIS Job Role Training

Donated Annual Leave

Forms: ZT70.1, ZT70.2, ZT70.5

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Introduction

Lesson Introduction

The State of Arizona offers a Donated Leave program. For more information regarding this program please see State Personnel Rule R2-5-403 (E) (<http://www.hr.state.az.us/Homepagelinks/Personnelrules.htm>). The amount of donated annual leave an Employee receives is calculated using both Employees' hourly rates of pay.

If the receiving Employee does not use all of the donated annual leave, the unused portion of the leave is returned to the donating Employee(s) on a pro-rata basis.

Donated Annual Leave is processed using five Forms:

- Donated Annual Leave Batch Maintenance (ZT70.5),
- Donated Annual Leave (ZT70.1),
- Donated Annual Leave subform (ZT70.3),
- Donated Annual Leave Return (ZT70.2),
- Donated Annual Leave Return subform (ZT70.4).



Notes

- Before inputting Donated Leave, the Agency Payroll Initiator should always verify the Employee is eligible to receive donated leave. HRIS does not have any checks to verify this.
- In addition, before starting the process, verify that the Donated Annual Leave paper form has been completed and signed by each donating Employee.
- If Donated Leave is going to be used in a specific pay period, the donation of the leave must be processed during or before the last day of the pay period. If the donation is not processed before the pay period ends, then the leave will not be available to the recipient to use until the next pay period.

Example Calculation of Donation and Return of Donated Leave

Example:

- EIN 12345 – Needs leave donated to them, this employees rate of pay is 10.00
- EIN 23456 – donates 25 hours leave at a rate of 12.50
- EIN 34567 – donates 10 hours at a rate of 8.00
- EIN 45678 – donates 100 hours at a rate of 15.00

HRIS will then calculate $(25*12.50)/10 = 31.25$ hours, $(10 * 8)/10 = 8.0$ hours and $(100*15)/10 = 150.00$ hours. Employee 12345 will receive a total donation of 189.25 hours.

If the employee uses 160.00 hours and then returns to work a balance will remain in the employees donated leave bucket of 29.25 converted hours remaining.

The total original hours donated are 135. Each of the hours donated are divided by the 135 to come up with the percentage of total donations.

- EIN 23456 – $25/135 = 18.5185\%$
- EIN 34567 – $8/135 = 5.9259\%$
- EIN 45678 – $100/135 = 74.0740\%$

These percentages are used to figure out how many hours the employee will get back when the leave is returned.

- EIN 23456 – $29.25 * 18.5185\% = 5.4166$ hours * $(10/12.50) = 4.333$ hours returned
- EIN 34567 – $29.25 * 5.9259\% = 1.7333$ * $(10/8) = 2.1666$ hours returned
- EIN 45678 – $29.25 * 74.0740\% = 21.6667$ * $(10/15) = 14.4445$ hours returned.

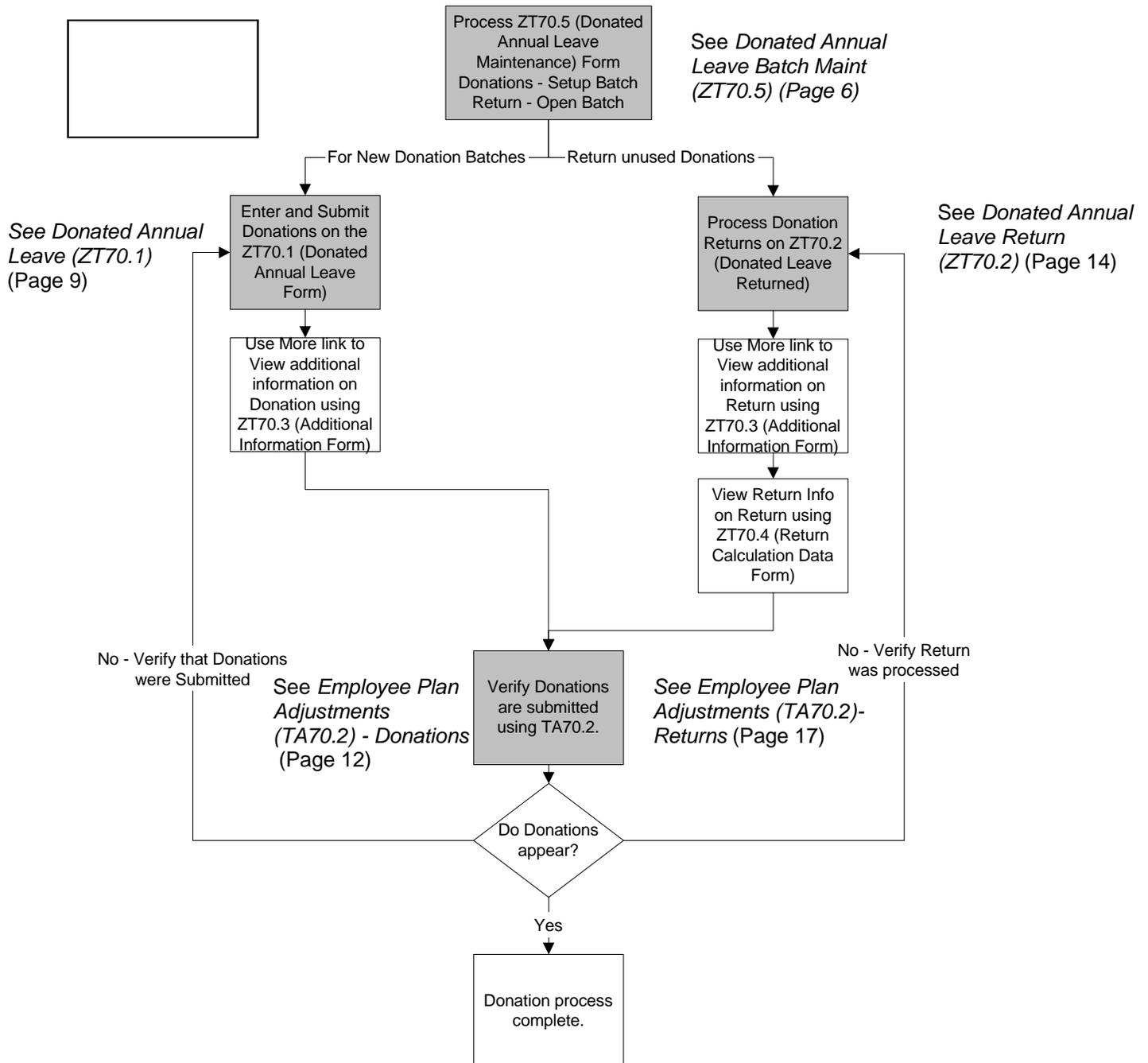
The employee will show a balance remaining of .4334 in their donated leave balance (This is an issue currently being address by HRIS).

HRIS Donation Leave Process

Required forms appear as:



Optional forms appear as:



Processing New Donations or Returning Unused Donations

Donated Annual Leave Batch Maint (ZT70.5)

The screenshot shows the HRIS State of Arizona interface for Zmtabatch Maintenance (ZT70.5). The page title is "Zmtabatch Maintenance (ZT70.5)". The user is logged in as "Welcome Frank" with a "[logout]" link. A search bar contains "zt70.5". A navigation bar includes buttons for "+ Add", "Change", "- Delete", "Previous", "Inquire", "Next", and another "Inquire" dropdown. The main form area contains several input fields: "Company" (callout 2), "Employee" (callout 3), "Batch Nbr" (callout 4), "Donation Begin" (callout 5), and "End". Below these fields are labels for "Eligible Bal at Return", "Pending Hrs at Return", "Return Calc Pct", and "Status". A blue sidebar is visible on the left side of the page.

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
1	White Search Box	R	Type ZT70.5 in the White Search Box. Press <i>Enter</i> on the keyboard	The Donated Annual Leave Batch Maint (ZT70.5) form will open.	
2	Company Field	R	Type 1 in Company field.	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.
3	Employee Field	R	Type in the EIN of the person who will be receiving the Donated Annual Leave.		
4	Batch Nbr Field	R	Type or select from the drop down menu a unique batch number.		If you are unsure of what batch number to use, click the grey drop down arrow at the end of the field and find the last number. Click Close and type in the next sequential number in the series (e.g., if last batch was 1048, type in 1049).
5	Donation Begin Field	R	Type or select from the drop down menu the first date the employee is eligible to receive donations.		
	End Field	N / A	Do NOT input a value in this field. The End Date will be populated by HRIS when the Donation Return is processed.		
6	Add/Change/ Inquire Buttons	R	Click Add, if setting up a new donation batch. Click Inquire/Change if processing a donation return.	See 'Add Complete – Continue' in the lower left corner of the screen if Add was clicked. See 'Inquiry Complete' in the lower left corner of the screen if Inquiry was clicked. See 'Change Complete – Continue' in the lower left corner of the screen if Change was clicked.	If Add was clicked, you should see the words 'Created' appear in the Status Field.
7	Related Links Donated Annual Leave Donated Annual Leave Return	R	Click the Donated Annual Leave link if creating a new donation batch. Click Donated Annual Leave Return if returning unused leave.	If Donated Annual Leave is clicked the Donated Annual Leave Form (ZT70.1) will open. If Donated Annual Leave Return is clicked the Donated Annual Leave Return (ZT70.2) will open.	

Process Update

Depending on whether you are creating new donations or returning leave, you will follow different steps.

- To continue setting up new Donation batches, continue with section: Donated Annual Leave (ZT70.1) (Page 9)
- To process the return of Donations, continue with section: Donated Annual Leave Return (ZT70.2) (Page 14)

Processing New Donations - Continued

Donated Annual Leave (ZT70.1)

The screenshot shows the HRIS State of Arizona interface for Plan Adjustments (ZT70.1). The page title is "Plan Adjustments (ZT70.1)" and the user is logged in as "Welcome Frank". The interface includes a navigation bar with "Add", "Change", "Previous", "Inquire", "Next", and "Inquire" buttons. A search bar contains "Zt70.1".

Callouts point to various fields and elements:

- 1: Search bar containing "Zt70.1"
- 2: Company dropdown menu showing "STATE OF ARIZONA"
- 3: Employee dropdown menu
- 4: Batch dropdown menu
- 5: "From" label for the first column of the table
- 6: "From" label for the second column of the table
- 7: "From" label for the third column of the table
- 8: "Current From" label for the fourth column of the table
- 9: "Hours" label for the fifth column of the table
- 10: "Plan Adjustments (ZT70.1)" title

FC	Co	Employee	Pay Rate	Plan	Donated	To Deposit	ERR
<input type="checkbox"/>	<input type="text"/>						
<input type="checkbox"/>	<input type="text"/>						
<input type="checkbox"/>	<input type="text"/>						
<input type="checkbox"/>	<input type="text"/>						
<input type="checkbox"/>	<input type="text"/>						
<input type="checkbox"/>	<input type="text"/>						
<input type="checkbox"/>	<input type="text"/>						
<input type="checkbox"/>	<input type="text"/>						
<input type="checkbox"/>	<input type="text"/>						
<input type="checkbox"/>	<input type="text"/>						

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
1	White Search Box	R	If ZT70.1 is not already open, type ZT70.1 in the White Search Box. Press <i>Enter</i> on the keyboard. If ZT70.1 is already open, skip this step.	The Donated Annual Leave (ZT70.1) form will open.	
2	Company Field	R	If you transferred from ZT70.5, Company 1 should already appear in this field. If it does, skip this step. If Company 1 does not appear, type 1 in Company field.	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.
3	Employee Field	R	If you transferred from ZT70.5, the EIN should already appear in this field. If it does, skip this step. If the EIN for the recipient does not appear, type in the EIN in this field.		
4	Batch Nbr Field	R	If you transferred from ZT70.5, the Batch number should already appear in this field. If it does, skip this step. If the Batch number does not appear, select it from the drop down menu.		To access the drop down menu, click the grey arrow at the end of the field.
5	FC Field	R	Type or select from the drop down menu, FC = 'A' or Add.		
6	From Co Field	R	Type or select from the drop down menu the company of the donating employee. State of Arizona employees belong to Company 1.		All forms/actions must contain a 1 in the Company Field.
7	From Employee Field	R	Type or select from the drop down menu the EIN of the donating employee.		

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
8	From Plan Field	R	Type or select from the drop down menu the applicable plan the employee is donating the leave from.		Employees can only donate from their Annual Leave Plan
9	Hours Donated Field	R	Type in the number of hours being donated.		
Repeat Steps 5 – 9 for each employee that is making a donation.					
10	Add Button	R	Click Add after all donations have been entered.	See message “Add Complete – Continue” in the lower left corner of the screen.	The Current Pay Rate for the donor, the Hours to Deposit for the recipient will now appear. In addition, the More tab will appear for each row.
11	More tab	O	Click on the More tab to display more details about each specific donation.	The Additional Information (ZT70.3) form will open.	This form provides a summary of each donor’s information and can be printed to provide a hard copy for filing. From ZT70.3, click Close when done viewing. This returns you to ZT70.1
5	FC Field	R	To complete the processing of each donation, Type ‘S’ or select from the drop down menu ‘Submit Donation’ for each row of donations.		WARNING – if this step is not completed, the donations will not process in HRIS.
12	Submit Button	R	Click Submit to submit all donations marked with ‘S’.	See message “Donations Submitted” in the lower left corner.	Donations should now appear on the TA70.2 form. Note, these steps may have repeated multiple times due to the number of donors. More donors can be added using the PageUp / PageDown buttons. If multiple pages of donors exist. The submission step will need to be repeated for each page.
1	White Search Box	R	Type TA70.2 in the White Search Box. Press <i>Enter</i> on the keyboard.	The Employee Plan Adjustments (TA70.2) form will open.	

Processing New Donations - Process Update

Now that all donations have been entered, verify that the donations were submitted successfully by checking the Employee Plan Adjustments (TA70.2) Form. If donations do not appear on this screen, then they were not submitted successfully.

- To continue setting up new Donation batches, continue with section: Employee Plan Adjustments (TA70.2) - Donations (Page 12)

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
1	White Search Box	R	If TA70.2 is not already open, type TA70.2 in the White Search Box. Press <i>Enter</i> on the keyboard. If TA70.2 is already open, skip this step.	The Employee Plan Adjustments (TA70.2) form will open.	
2	Company field	R	Type 1 in Company field.	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.
3	Employee field	R	If you transferred directly from ZT70.1, the EIN should already appear in this field. If it does, skip this step. If the EIN for the recipient does not appear, type in the EIN in this field.	System will bring up needed information.	You must enter the correct EIN.
4	Inquire Button	R	Click Inquire	See the message 'Inquiry Complete' in the lower left corner.	
5	FC field Plan Field Adjustment Field Type Field Date Field Description Field Status Field	N / A	No information will be input on this form for Donated Leave. A row should appear on this form for every donation the employee is receiving.		If donations do not appear, verify on the ZT70.1, that the donations were submitted. If you return to the ZT70.1 and Inquire on the batch and any donations appear, repeat the step on ZT70.1 instructions to submit these donations.

The Donation Process is NOW Complete. Once the employee is no longer in need of the donated leave, you can return any unused leave by following the Returning Unused Donations process in this manual.

Returning Unused Donations - Continued

Donated Annual Leave Return (ZT70.2)

HRIS State of Arizona Employee Plan Adjustments (ZT70.2)

Welcome Frank [logout]

Zt70.2

Home >> << Previous ? Inquire Next | Return

2 Company [1] STATE OF ARIZONA

3 Employee []

Cur Pay Rate 11.7274

4 Batch [226] Closed/Returned

8 Return Info

From Co	From Employee	From Plan	Hours Donated	Hours Deposited	Donation Returned	Deposit Returned	ERR
1	21894	ANN-COVERD	16.00	16.39	.03	.03	More
1	33376	ANN-COVERD	4.00	7.14	.01	.01	More
1	22868	ANN-COVERD	8.00	12.42	.02	.02	More
1	96422	ANN-COVERD	16.00	16.82	.03	.03	More
1	79964	ANN-COVERD	40.00	73.34	.08	.15	More
1	40155	ANN-COVERD	8.00	10.19	.02	.02	More
1	82495	ANN-COVERD	3.00	4.24	.01	.01	More
1	25053	ANN-COVERD	10.00	19.79	.02	.04	More

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Done Internet 100%

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
1	White Search Box	R	If ZT70.2 is not already open, type ZT70.2 in the White Search Box. Press <i>Enter</i> on the keyboard. If ZT70.2 is already open, skip this step.	The Donated Annual Leave Return (ZT70.2) form will open.	
2	Company Field	R	If you transferred from ZT70.5, Company 1 should already appear in this field. If it does, skip this step. If Company 1 does not appear, type 1 in Company field.	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.
3	Employee Field	R	If you transferred from ZT70.5, the EIN should already appear in this field. If it does, skip this step. If the EIN for the recipient does not appear, type in the EIN in this field.		
4	Batch Nbr Field	R	If you transferred from ZT70.5, the Batch number should already appear in this field. If it does, skip this step. If the Batch number does not appear, select it from the drop down menu.		To access the drop down menu, click the grey arrow at the end of the field.
5	Inquire Button	R	Click Inquire	All unused donations will appear on the display area.	
6	More tab	O	Click on the More tab to display more details about each specific donation.	The Additional Information (ZT70.3) form will open.	This form provides a summary of each donor's information and can be printed to provide a hard copy for filing. From ZT70.3, click Close when done viewing. This returns you to ZT70.1
7	Return Button	R	Click Return to process the return of the unused donated leave.	See message 'Return Complete' in the lower left corner of the screen.	The form should now show the amount of hours being returned to each donor in the Deposit Returned Field. The Return Info link will now appear. This link will provide additional details about the return.
8	Return Info	O	Click on Return Info link to display	The Return Calculation Data	Additional information includes

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
	Link		additional details about the donation return.	(ZT70.4) form will open.	Calculated Donated Leave Balance, Donated Hours Total and Return Calculation Percentage. When done viewing this information, Click OK or Cancel.
1	White Search Box	R	Type TA70.2 in the White Search Box. Press <i>Enter</i> on the keyboard.	The Employee Plan Adjustments (TA70.2) form will open.	

Processing Donation Returns - Process Update

Now that all donations have been returned to the donors, verify that the donation returns were submitted successfully by checking the Employee Plan Adjustments (TA70.2) Form. If donation returns do not appear on this screen, then they were not submitted successfully.

- To continue processing donation returns, continue with section: Employee Plan Adjustments (TA70.2)- Returns (Page 17)

Employee Plan Adjustments (TA70.2)- Returns

HRIS State of Arizona

Welcome Frank [logout]

Employee Plan Adjustments (ZT70.2)

Search: Zt70.2

Navigation: >> Previous Inquire Next Inquire

Company: 1 STATE OF ARIZONA

Employee: []

Cur Pay Rate: []

Batch: []

From	From	From	Hours	Hours	Donation	Deposit
Co	Employee	Plan	Donated	Deposited	Returned	Returned ERR

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
1	White Search Box	R	If TA70.2 is not already open, type TA70.2 in the White Search Box. Press <i>Enter</i> on the keyboard. If TA70.2 is already open, skip this step.	The Employee Plan Adjustments (TA70.2) form will open.	
2	Company field	R	Type 1 in Company field.	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.
3	Employee field	R	If you transferred directly from ZT70.2, the EIN should already appear in this field. If it does, skip this step. If the EIN for the recipient does not appear, type in the EIN in this field.	System will bring up needed information.	You must enter the correct EIN.
4	Inquire Button	R	Click Inquire	See the message 'Inquiry Complete' in the lower left corner.	
5	FC field Plan Field Adjustment Field Type Field Date Field Description Field Status Field	N / A	No information will be input on this form for Donated Leave. A row should appear on this form for every donation return from the employees account. The returns should show a negative amount being deducted from the employee.		You can also see the transfers that will go into the donors account being inquiring on his;/her EIN on this form.

The Donation Return Process is NOW Complete. When the nightly HRIS process is completed, the hours will be returned to the original donors. If the same employee receives additional donated leave, a new batch will need to be created.