



ABSENCE MANAGEMENT

Implementation Date: April 23rd, 2012

Jennifer Bowling
602.542.7464
jennifer.bowling@azdoa.gov



UPGRADE INFORMATION

HRIS, YES and ETE will all be impacted by the upgrade and therefore will be unavailable for viewing and updating beginning Thursday, April 19th, 2012 at 6:00 PM until Monday, April 23rd, 2012 at 7:00AM. Please make your staff aware of these particular transactions that will be impacted by the upgrade:

- The **Handwrite** system will not be available for any input or processing on Friday, April 20th. Please plan accordingly.

- Starting immediately and until the upgrade, do not enter any **Personnel Actions** that have an effective date after April 19, 2012. Any pending personnel actions remaining in the system on the day of upgrade will require that the HRIS team delete them before the upgrade can begin. It will also require the agency to re-enter the actions in HRIS when the system becomes available again on April 23, 2012.

- **Manual Entries:** The last transaction date for (TA70) will be April 19, 2012. Any transactions with an effective date after April 19, 2012 will require deletion by the GAO before the upgrade can begin. After the 19th, adjustments must be made in the new Absence Management system (LP70).

- **Donated Leave:** Although the (ZT70) will continue to be utilized with the Absence Management system starting April 23, 2012, it will have a new look.



INTRODUCTION

- **What is it?**

- Absence Management is an absence tracking solution that allows agencies to manage, track, and report on various leave plans including annual, sick, and leave of absence
- Automated tool for employee plan enrollments and terminations
- Absence Management (LP) will replace our current Time Accrual (TA) module
- “AM” was already used in a different module so it has been named LP which stands for Leave Processing. LP is used to designate all Absence Management forms
- Process level security is applied to all LP forms

- **Who will be affected?**

- Payroll Approvers and Initiators
- Time Keepers
- HR Approvers and Initiators
- Report Professionals



INTRODUCTION

What is an Absence Plan?

A plan is the umbrella of the structure groups and designates the leave type

Examples of Absence Plans are:

- Annual Leave
- Sick Leave
- Donated Leave

What is a Structure Group

Structure group is a set of rules that applies to an employee group. Example, one structure group would include "Full Time / Uncovered" employees into a plan and then a set of rules would apply. An employee will only be eligible for one structure group per absence plan.

Examples of Structure Group Rules are:

- Accrual Rule (i.e. accrual 6.47 each pay period)
- Limit Rule (i.e. can only carryover 320 hours)
- Eligibility Rule (i.e. adjusted hire date)



INTRODUCTION

- **How are employees enrolled or transitioned into a structure group?**
 - Employees are added or removed from plans based on employee or structure groups which are based on common criteria. This criteria will determine eligibility for Absence Management structure group and if employee's criteria changes, Absence Management jobs are processed to move employees from one group to another on a nightly basis
 - *Some examples of criteria are:*
 - EE Status Code
 - FTE
 - Pay Plan (Excluded, Exempt, or Non Exempt)
 - User Field (Annual, Sick or Comp)

Employee (HR11.1)

>> + Add Change - Delete < Previous ? Inquire > Next | Inquire ▾

Company STATE OF ARIZONA

Employee SMITH, JOHN L. Effective

Main Assignment Pay Work Personal Address Work Elig User Flds Tax >>

More Records Exist - Use PageDown

| FC | Type | Field Name | Value | Description | Sts | Curr | Req |
|--------------------------|-------|-------------------|----------|----------------|-----|------|-----|
| <input type="checkbox"/> | Alpha | ANNUAL LEAVE PLAN | LPANUNC1 | LP ANN UNCOVER | | | Yes |
| <input type="checkbox"/> | Alpha | CASH/COMP | NONE | EE EXCLUDED-IN | | | Yes |

More Records Exist - Use PageDown

| FC | Type | Field Name | Value | Description | Sts | Curr | Req |
|--------------------------|-------|------------------|------------|-------------------------|-----|------|-----|
| <input type="checkbox"/> | Alpha | SICK LEAVE PLAN | NO ACCRUAL | NOT ELIGIBLE FOR SICK I | | | Yes |
| <input type="checkbox"/> | Alpha | ACTIVE PENSION | | | | | |
| <input type="checkbox"/> | Date | AGENCY HIRE DATE | 10/06/2008 | | | | |



INTRODUCTION

What are the Structure Group's Naming Conventions?

LPANUNC1 = LP / AN / UNC/1

- LP = Absence Management
- AN = Leave Plan (i.e. Annual)
- UNC = Uncovered
- 1 = FTE (1.0)

LPANCVD1 = LP / AN / CVD/1

- LP = Absence Management
- AN = Leave Plan (i.e. Annual)
- CVD = Covered)
- 1 = FTE (1.0)

LPSKSTAND2 = LP / SK / STAN/2

- LP = Absence Management
- SK = Leave Plan (i.e. Sick)
- Stand = Standard
- 2 = FTE (.5)

FTE Definitions:

- 1 = 1.0 FTE
- 2 = 1/2 FTE
- 3 = 3/4 FTE
- 4 = 1/4 FTE.

Structure Group Descriptions: will display the starting accrual rate when applicable.

Leave Plans:

AN = Annual

SK = Sick

PR = Personal

CM = Compensatory



Differences with Absence Management

| TYPE | TIME ACCRUAL | ABSENCE MANAGEMENT |
|-------------------------|--|--|
| Time Record Adjustments | <ul style="list-style-type: none"> •Prior time record adjustments did not impact TA balances. Balance corrections were processed manually. | <ul style="list-style-type: none"> •Prior time record adjustments (both positive and negative) will impact LP balances. Balances are self-correcting using the actual time record date. |
| Handwrites | <ul style="list-style-type: none"> •In most cases, handwrite time records were not picked up with the TA payroll processing. Balance corrections processed manually in TA70. | <ul style="list-style-type: none"> •Handwrite time records will self-correct balances using the time record date. |
| Manual Adjustments | <ul style="list-style-type: none"> •TA70 - In order to select the proper TA plan, the User had to scroll through a master list of plans. •Only one value was available, "ME" for type. | <ul style="list-style-type: none"> •LP70 - When the User chooses the type of plan, e.g. ANNUAL, the form will automatically populate with the open LP Structure. |



Differences with Absence Management

| TYPE | TIME ACCRUAL | ABSENCE MANAGEMENT |
|----------------------------|---|--|
| Balances | <ul style="list-style-type: none"> Totals carry out to 4 digits e.g. 1.0001 | <ul style="list-style-type: none"> Totals carry out to 6 digits e.g. 1.000100 (can only be paid at 2 digits, however) |
| Employee Balance Transfers | <ul style="list-style-type: none"> Balances did not consistently transfer when new criteria placed an employee into a new plan. Needed to move employee leave balances from one to another using the TA70 | <ul style="list-style-type: none"> LP does not depend on automations rules to allow balances to transfer. Employees leave balances will automatically transfer from one to another |
| Adjustments | <ul style="list-style-type: none"> In TA, there were several reasons why users had to make adjustments | <ul style="list-style-type: none"> In LP, very minimal adjustments need to be made – it is more automated |
| Family Sick | <ul style="list-style-type: none"> Original 40 hours manually entered for new hires in TA70 | <ul style="list-style-type: none"> System grants 40 hours to all eligible new hires but still need to accrue sick leave to use. |

HRIS INPUT



- **New Hire / Rehire / Interagency Transfer / Job Change**

- Status Code
- User Field
- FTE
- Employee Dates

***Very important that the information above is accurate in HRIS for
Absence Management processing

- **History Corrections**

- Process remains the same

*****EXCEPTION** – History Corrections that have an effective date prior to
1/1/2010 must contact the HRIS Help Desk for assistance

HRIS INPUT



- **Pay Codes**
 - Remain the same except for FMLA
- **FMLA Leave**
 - New FMLA tracking system, ADOA will deploy agencies incrementally at a later time
- **Holiday Leave**
 - Same process (pay codes 320, 321, 322)
- **Donated Leave**
 - Same process, new look to form (ZT70)



DATE DEFINITIONS

Affects Absence Management

- **Adjusted Hire Date** – is a *manually* computed date for employees returning to state employment after a break in service of less than two years or for leave without pay in excess of 240 hours (except for leave and approved FMLA). This date is used for determining annual leave accrual rates. Therefore it *MUST* be changed if an employee is rehired after a break in service but does not change if an employee transfers between state agencies and there is no break in service.

DOES NOT Affect Absence Management

- **Hire Date** - is the employee's most recent hire date (which is equal to their first day of work) with the State of Arizona after a break in service. Therefore it *MUST* be changed if an employee is rehired after a break in service but does not change if an employee transfers between state agencies and there is no break in service.
- **Original Hire Date** - is the first date the employee ever worked for a state agency. This date should never change, even if the employee is a re-hire.
- **Reported as New Hire** - This date is left blank initially and will be filled in when the State New Hire Report is processed
- **Seniority Hire Date** – is only used for DOC employees.
- **Anniversary Date** – should be equal to the Hire Date.
- **Agency Hire Date** - is used when the employee first begins working for your Agency. It is used when an employee transfers between agencies. Therefore it *MUST* be changed if an employee is rehired after a break in service and if an employee transfers between state agencies.
- **Job Code Hire Date** - is used when the employee changes job codes.



DRILL AROUND

- Time Accrual (TA) information will still be available via “Drill Around” for transactions that occurred **PRIOR** to April 20th, 2012. *TA forms and reports* will not be available after the Absence Management implementation.
- Absence Management (LP) information will be available via “Drill Around” for transactions that occur **AFTER** April 20th, 2012. There are several folders that will be available and they are as follows:
 - Absence Plans
 - Employee Event History
 - Employee Service History
 - Leave of Absence (FMLA Tracking)



NEW FORMS IN HRIS

| NEW LP FORM # | DESCRIPTION | OLD TA |
|---------------|---------------------------------------|--------|
| LP60.1 | EE Service Inquiry | |
| LP60.2 | Employee Event Inquiry | |
| LP62.1 | EE Date Calendar | |
| LP62.2 | EE Days Calendar | |
| LP63.1 | Absence Plan Hours Balances | TA65.1 |
| LP64.1 | EE Transaction Detail Inquiry | TA65.3 |
| LP64.2 | EE Transaction Summary Inquiry | TA65.2 |
| LP64.3 | EE Transaction Detail Balance Inquiry | |
| LP65.1 | EE Plan Balance Inquiry | |
| LP31.1 | EE Absence Plan Master | TA60.1 |
| LP70.1 | Manual Transactions By EE | TA70.2 |
| LP70.2 | Manual Transactions By Plan Structure | TA70.1 |
| LP220 | EE Absence Plan History Report | |
| LP260 | EE Service & Event Report | |
| LP262 | EE Event Audit Report | |
| LP264 | EE Transaction History Report | TA290 |
| LP270 | Open Manual Transactions | TA270 |



LP31.1: EE Absence Plan Master

Use Employee Absence Plan Master to VIEW the dates and balances for each plan structure to which an employee belongs. **Form is updated each payroll compute**

Similar to the TA60.1

MASTER ENTRY: Date the employee first entered into LP. Upon conversion, date will be 01/01/2010.

*****ACCRUAL END:** Date the employee moved out of the Structure Group and identifies the last date an employee will receive accruals under this plan. Employee can still receive manual transactions.

*****MASTER END:** Date the Structure Group was closed and identifies the last date any processing (including manual transactions) for this employee can occur.

SERVICE BEGIN: Date that starts calculation and is equal to the Adjusted Date of Hire

ACCRUAL FROM: Date from which accruals are calculated.

ACCRUAL START: Earliest date on which an accrual will be calculated.

ALLOTMENT BEGIN: Earliest date on which an allotment will be calculated.

ELIGIBILITY BEGIN: Date that starts eligibility of plan (Adjusted Date of Hire)

LIMIT RESET: The month and day when balance resets occur (used for annual leave rollback)

HOURS LAST PERIOD END: The period end date through which service records have been evaluated for processing if hours calculation is based on a service class.

*****ACCRUAL LAST:** The date for which an accrual was last processed.

*****ALLOTMENT LAST:** The date for which an allotment was last processed.

ELIGIBILITY LAST: The date for which an accrued balance was last moved to available balance.

CARRYOVER LAST: Last time a balance was reset. (e.g. Family Sick)

EARNINGS LAST PERIOD END: NOT USED BY SOA.



LP31.1: EE Absence Plan Master

Similar to the 60.1

Employee Absence Plan Master (LP31.1)

» + Add ✎ Change - Delete ◀ Previous ? Inquire ▶ Next | Inquire ▾

Company STATE OF ARIZONA

Employee BOWLING, JENNIFER L.

Absence Plan ANNUAL LEAVE PLAN

Structure Group LP ANN UNCOVERED FT_6.47

Position

| Dates | Balances | Carryover | GL Accounts | Override Tables |
|-------|--------------------|-----------|-------------|-----------------|
| | Available Hours | | | 76.890000 |
| | Accrued Hours | | | |
| | Allotment Hours | | | |
| | Reserved Hours | | | |
| | Available Earnings | | | |
| | Accrued Earnings | | | |
| | Allotment Earnings | | | |
| | Reserved Earnings | | | |

Available / Accrued / Allotment / Reserved Hours: Displays hours available in the plan.

Available / Accrued / Allotment / Reserved Earning: Not used by SOA

NOTE: Carryover, GL Accounts and Override tables should be disregarded as well as the Position field



LP60.1 EE Service Inquiry

Form is used to view employee service hours by service class or service code. Form can also be used to verify the number of hours calculated for length of service.

Enter **EIN**, **Service Code** or **Service Class**, and a **Date Range** and then click **Inquire**

Employee Service Inquiry (LP60.1)

Previous ? Inquire Next Inquire

Company STATE OF ARIZONA
 Employee BOWLING, JENNIFER L.
 Service Class ANNUAL LEAVE BALANCE
 Service Code
 Date Range

Total button will appear after you click **Inquire**. Once you click on **Totals**, you will be directed to the sub-form LP60.3

Totals

Service Code represents the type of hours and also mimics pay summary groups.

- Annual leave = 300
- Sick leave = 310

Service Class is a grouping of service codes

- ANN = Annual Leave
- BAS = Base Hours

| Service Code | Description | Date | Hours | Earnings |
|--------------|--------------------|------------|-------|----------|
| 300 | ANNUAL LEAVE TAKEN | 12/30/2011 | 8.00 | |
| 300 | ANNUAL LEAVE TAKEN | 12/29/2011 | 8.00 | |
| 300 | ANNUAL LEAVE TAKEN | 12/28/2011 | 8.00 | |
| 300 | ANNUAL LEAVE TAKEN | 12/27/2011 | 8.00 | |
| 300 | ANNUAL LEAVE TAKEN | 11/25/2011 | 8.00 | |
| 300 | ANNUAL LEAVE TAKEN | 11/15/2011 | 8.00 | |
| 300 | ANNUAL LEAVE TAKEN | 11/14/2011 | 8.00 | |
| 300 | ANNUAL LEAVE TAKEN | 11/10/2011 | 8.00 | |
| 300 | ANNUAL LEAVE TAKEN | 09/16/2011 | 8.00 | |
| 300 | ANNUAL LEAVE TAKEN | 09/15/2011 | 8.00 | |
| 300 | ANNUAL LEAVE TAKEN | 09/14/2011 | 8.00 | |



LP60.3: EE Service Totals

Use Employee Service Totals to view total hours for a specific service class or code.

Employee Service Totals (LP60.3)

OK

Cancel

Detach

| | | |
|------------------------|------------|----------------------|
| Company | 1 | STATE OF ARIZONA |
| Employee | 126074 | BOWLING, JENNIFER L. |
| Service Class | ANN | ANNUAL LEAVE BALANCE |
| Service Code | | |
| Date Range | 01/01/2011 | 12/31/2011 |
| Total Service Hours | | 162.00 |
| Total Service Earnings | | |

NOTE: The only way to access this sub-form is to click **Totals** on the LP60.1



LP60.2: EE Event Inquiry

Form is used to view employee service hours by reason class or reason code. Form can also be used to verify the number of hours calculated for length of service.

Enter **EIN**, **Reason Code** or **Reason Class**, and a **Date Range** and then click **Inquire**. You also have the option of filtering by a **Search Day** (M-F)

Reason Code

Represents an event on a time record and also mimics pay summary groups.

- Annual leave = 300
- Sick leave = 310

Reason Class is a grouping of reason codes

- FML = FMLA Hours

Employee Event Inquiry (LP60.2)

Navigation: Previous | Inquire | Next | Inquire

Company: STATE OF ARIZONA
 Employee: 126074 BOWLING, JENNIFER L.

OR

Reason Class:
 Reason Code: 310 SICK LEAVE TAKEN
 Date Range: 01/01/2011 - 12/31/2011
 Search Day:

| Reason Code | Description | Date | Day | Hours | Points | Occ |
|-------------|------------------|------------|-----------|-------|--------|-----|
| 310 | SICK LEAVE TAKEN | 11/21/2011 | Monday | 8.00 | | Yes |
| 310 | SICK LEAVE TAKEN | 11/02/2011 | Wednesday | 10.00 | | Yes |
| 310 | SICK LEAVE TAKEN | 08/09/2011 | Tuesday | 10.00 | | Yes |

Total button will appear after you click **Inquire**. Once you click on **Totals**, you will be directed to the sub-form LP60.3



LP60.4: EE Event Totals

Use Employee Event Totals to view total hours for a specific reason class or code.

Employee Event Totals (LP60.4)

← Back Detach » ? Inquire | Inquire ▾

| | | |
|--------------------------|------------|----------------------|
| Company | 1 | STATE OF ARIZONA |
| Employee | 126074 | BOWLING, JENNIFER L. |
| Reason Class | | |
| Reason Code | 310 | SICK LEAVE TAKEN |
| Date Range | 01/01/2011 | 12/31/2011 |
| Search Day | | |
| Total Event Hours | | 28.00 |
| Points | | |
| Occurrences | 3 | |

NOTE: The only way to access this sub-form is to click Totals on the LP60.2



LP62.1: EE Date Calendar

Use Employee Date Calendar to view employee attendance event history in a calendar format. A year is designated by selecting an ending month and year. All events for the 12-month period ending with the month and year selected will be displayed.

Enter **EIN**, ending **Month** and **Year**, **Reason Code** and then click **Inquire**

Employee Date Calendar (LP62.1)

|

Company STATE OF ARIZONA
 Employee BOWLING, JENNIFER L.

Year Ending

Reason Class

OR Reason Code

| | Totals | | | | | | | | | | | |
|--|-------------|--|--|--|--|--|--|--|--|--|--|--|
| | Hours | | | | | | | | | | | |
| | 162.00 | | | | | | | | | | | |
| | Points | | | | | | | | | | | |
| | 20 | | | | | | | | | | | |
| | Occurrences | | | | | | | | | | | |
| | 20 | | | | | | | | | | | |

| Month | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 0 | 1 | 2 | 3 | 3 |
|-----------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| April | | | | | | | | | | | | | | | | | | | | | | | | |
| May | | | | | | | | | * | * | * | | | | | | | | | | | | | |
| June | | | * | | | | | | | | | | | | | | | | | | | | | |
| July | | | | | | | | | | | | | | | | | | | | | | * | | |
| August | | | | | | | | | | | | | | | | | | | | | | | * | |
| September | | | | | | | | * | | | * | * | * | * | * | | | | | | | | | |
| October | | | | | | | | | | | | | | | | | | | | | | | | |
| November | | | | | | | | | * | | | * | * | | | | | | | | * | | | |
| December | | | | | | | | | | | | | | | | | | | | | * | * | * | * |
| January | | | | | | | | | | | | | | | | | | | | | | | | |
| February | | | | | | | | | | | | | | | | | | | | | | | | |
| March | | | | | | | | | | | | | | | | | | | | | | | | |



LP62.2: EE Days Calendar

Use Employee Days Calendar to view a weekly calendar of employee events. All events for the 12 month period are displayed based on the day of the week on which the event falls. The purpose of this screen is to give a total count of events by day for each month. You can filter the events that display to a specific reason code or reason class.

Enter **EIN**, ending **Month** and **Year**, **Reason Code** and then click **Inquire**

Employee Days Calendar (LP62.2)

|

Company

Employee BOWLING, JENNIFER L.

Year Ending

Reason Class

OR Reason Code

| | Hours | | Points | | Totals | |
|--|-------|--|-------------|--|--------|--|
| | | | | | | |
| | | | | | 44.00 | |
| | | | Occurrences | | 5 | |

| Month | Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|-----------|--------|--------|---------|-----------|----------|--------|----------|
| April | | | | | | | |
| May | | | | | | | |
| June | | | | | | | |
| July | | | | | | | |
| August | | | 1 | | | | |
| September | | | | | | | |
| October | | | | | | | |
| November | | 1 | | 1 | | | |
| December | | | | | | | |
| January | | 1 | | | | | |
| February | | | | | | 1 | |
| March | | | | | | | |



LP63.1: Absence Plan Hours Balance

Use Absence Plan Hours Balances to view a summary of the balances from which hours can be "used" during a payroll cycle for all employees in a given plan structure.

Similar to the TA65.1

Choose **Absence Plan** and **Structure Group** and then click **Inquire**

Absence Plan Hours Balances (LP63.1)

Company: STATE OF ARIZONA
 Absence Plan: ANNUAL LEAVE PLAN
 Structure Group: LP ANN UNCOV 3/4_4.85

Position To:

| SC | Employee | Name | Position | Available |
|--------------------------|----------|------|----------|------------|
| <input type="checkbox"/> | | | | 131.800000 |
| <input type="checkbox"/> | | | | 334.550000 |
| <input type="checkbox"/> | | | | 58.790000 |
| <input type="checkbox"/> | | | | 282.580000 |
| <input type="checkbox"/> | | | | 171.640000 |
| <input type="checkbox"/> | | | | 331.950000 |
| <input type="checkbox"/> | | | | 37.150000 |
| <input type="checkbox"/> | | | | 105.950000 |
| <input type="checkbox"/> | | | | 57.240000 |
| <input type="checkbox"/> | | | | 5.780000 |
| <input type="checkbox"/> | | | | 9.770000 |
| <input type="checkbox"/> | | | | 102.210000 |

| | |
|---------|-----------|
| Reserve | Carryover |
|---------|-----------|



LP64.3: EE Transaction Detail Balance Inquiry

Use Employee Transaction Detail form to view detailed transactions that have been generated for an employee in a given plan structure. All of the transactions that impact a balance, including any that are created but not yet closed, will be displayed, along with selected amounts and dates from the employee master record.

Enter **EIN, Absence Plan, Structure Group** and **Accrual Type** (see below)

Employee Transaction Detail Balance Inquiry (LP64.3)

» < Previous ? Inquire > Next | Inquire ▾

Company STATE OF ARIZONA
 Employee BOWLING, JENNIFER L.
 Absence Plan ANNUAL LEAVE PLAN
 Structure Group LP ANN UNCOVERED FT_6.47
 Position
 Accrual Type Hours Position To

| Date | St | Transaction Type | Cycle or Hrs | Amount | Balance |
|------------|----|----------------------------|--------------|-----------|------------|
| 01/20/2012 | 9 | 3 LP570 manual transaction | | 70.420000 | 70.4200000 |
| 02/03/2012 | 9 | 33 Transfer from Accrual | | 6.470000 | 76.8900000 |

Date is actual date not Pay Period End Date

NOTE: Position – you will ignore this field altogether



LP64.1: EE Transaction Detail Inquiry

Use Employee Transaction Detail form to view detailed transactions that have been generated for an employee in a given plan structure. All of the transactions that impact a balance, including any that are created but not yet closed, will be displayed, along with selected amounts and dates from the employee master record.

Similar to the TA65.3

Enter **EIN**,
Absence Plan,
Structure Group,
Balance Type (see
page 12 for
definitions) and
then click **Inquire**

If applicable, the
Dates will
populate. To
view
transactional
information,
click on the
Transaction
tab

Employee Transaction Detail Inquiry (LP64.1)

» < Previous ? Inquire > Next | Inquire ▾

Company STATE OF ARIZONA
Employee BOWLING, JENNIFER L.
Absence Plan ANNUAL LEAVE PLAN
Structure Group LP ANN UNCOVERED FT_6.47
Position
Balance Type All Position To

Dates | **Transactions**

| | | | |
|-----------------------|------------|--------------------------|--|
| Master Entry Date | 01/01/2010 | Accrual End Date | |
| Last Accrual Date | 03/02/2012 | Master End Date | |
| Last Period End Hours | 03/02/2012 | Last Period End Earnings | |
| Accrued Hours Bal | | Accrued Earnings Bal | |
| Avail Hours Bal | 89.830000 | Avail Earnings Bal | |

NOTES: Available Hours Balance shown here is as of the “Last Accrual Date” and do not reflect the “unprocessed” transactions. Also, Last Period End Hours date shows the last time a payroll evaluated a possible accrual for the employee

Position – you will ignore this field altogether



LP64.1: EE Transaction Detail Inquiry

Use Employee Transaction Detail form to view detailed transactions that have been generated for an employee in a given plan structure. All of the transactions that impact a balance, including any that are created but not yet closed, will be displayed, along with selected amounts and dates from the employee master record.

Similar to the TA65.3

All Leave Plan Transactions will populate for the specific plan chosen. (see code definitions on last page)

***Most recent transactions will be on top!

Employee Transaction Detail Inquiry (LP64.1)

Company: 1 STATE OF ARIZONA
 Employee: 126074 BOWLING, JENNIFER L.
 Absence Plan: SICK SICK LEAVE PLAN
 Structure Group: LPSKSTAND1 LP SK STAND FT_3.70
 Position:
 Balance Type: All

Position To:

SOA will only use cycles

| Date | Status | Transaction Type | Amount | Type | Cycle or Hrs |
|------------|--------|----------------------------|------------|------|--------------|
| 03/02/2012 | 9 | 33 Transfer from Accrual | 3.700000 | 1 | |
| 03/02/2012 | 9 | 31 Transfer to Available | 3.700000- | 1 | |
| 03/02/2012 | 9 | 21 Accrual | 3.700000 | 1 | 485.00 |
| 02/29/2012 | 9 | 61 SICK LEAVE TAKEN | 8.000000- | 1 | |
| 02/17/2012 | 9 | 3 LP570 manual transaction | 789.300000 | 1 | |

NOTES:

- LP570 Manual Transaction is the balance available during the conversion on April 20th 2012
- When you select "All" for Balance Types, there will be three "Transaction types" for each accrual (transfer from, transfer to, and accrual). Absence Management has a three step process for each transaction and is really the same transaction. 25
- Position – you will ignore this field altogether



LP64.2: EE Transaction Summary Inquiry

Use Employee Transaction Summary Inquiry form to view a summary of the transactions that have been generated for an employee in a given absence plan structure. All transactions, including any that are created but not yet closed, are sub-totaled and displayed by type of transaction.

Similar to the TA65.2

Enter **EIN, Absence Plan, Structure Group** and **Balance Type**

Employee Transaction Summary Inquiry (LP64.2)

Company STATE OF ARIZONA
 Employee SMITH, JOHN L.
 Absence Plan ANNUAL LEAVE PLAN
 Structure Group LP ANN UNCOVERED FT_6.47
 Position
 Balance Type Available Hours

Master Entry Date 01/01/2010 Accrual End Date
 Reset Point 101 Master End Date
 Avail Hours Balance 89.830000 Avail Earn. Balance

Position To

| SC | Year Beginnng | Adjustments | Usage | Lost | Ending |
|----------------------|---------------|-------------|-------|------|-----------|
| <input type="text"/> | 2012 | 89.830000 | | | 89.830000 |
| <input type="text"/> | | | | | |
| <input type="text"/> | | | | | |

NOTE: Position – you will ignore this field altogether



LP220: EE Absence Plan History Report

Print a list of employees or a listing by Plan/Structure Group that shows changes in their history.

Parameters of LP220

Employee Absence Plan History Report (LP220)

>> + Add ✎ Change - Delete ◀ Previous ? Inquire ▶ Next | Inquire ▾

Job Name

Job Description

User Name Jennifer Bowling

Data Area/ID

Parameters

Company STATE OF ARIZONA

Absence Plan

Structure Group

Excluded End Dates

Employee

Date -

Date Type Effective Date

Page Break by Employee No

Report Sequence Employee



LP220: EE Absence Plan History Report

Print a list of employees or a listing by Plan/Structure Group that shows changes in their history.

Results of LP220

Employee **126074** BOWLING, JENNIFER L.

| Absence Plan | Structure Group | Position | Master Entry | Master End |
|--------------|-----------------|----------|--------------|------------|
| ANNUAL | LPANUNC1 | | 01/01/2010 | |

| Field Name | Previous Value | New Value | Date Change | User Id |
|--------------------|----------------|------------|-------------|----------|
| Accrual Last Date | | 03/02/2012 | 03/19/12 | testmstr |
| Available Hours | | 83.360000 | 03/16/12 | testmstr |
| Available Hours | 83.360000 | 89.830000 | 03/19/12 | testmstr |
| Elig Begin Date | | 10/06/2008 | 03/16/12 | testmstr |
| Elig Last Date | | 03/02/2012 | 03/19/12 | testmstr |
| Hours Last Per End | | 03/02/2012 | 03/19/12 | testmstr |
| Master Entry Date | | 01/01/2010 | 03/15/12 | testmstr |
| Reset Point | | 101 | 03/16/12 | testmstr |
| Service Begin Date | | 10/06/2008 | 03/16/12 | testmstr |



LP262: EE Event Audit Report

Employee Event Audit Report displays a list of employees who have met a specified threshold for absence events. For example, reaching a specified number of hours within a given time period or reaching a specified number of consecutive days. You can limit the report to events occurring within a specified date range, and/or to events within a specific reason class or code.

Parameters of LP262

Employee Event Audit Report (LP262)

>> + Add ✎ Change - Delete ◀ Previous ? Inquire ▶ Next | Inquire ▾

Job Name

Job Description

User Name Jennifer Bowling

Data Area/ID

Parameters

Company STATE OF ARIZONA

Date Range -

Reason Class

OR Reason Code SICK LEAVE TAKEN

Report Sequence Employee

Employee Sequence Use Company Default

Include Comments No

Create CSV File Yes



LP262: EE Event Audit Report

You can limit the report to process levels, departments, status code or even by a single employee.

Parameters of LP262 (Cont'd)

Employee Event Audit Report (LP262)

>> + Add Change - Delete < Previous ? Inquire > Next | Inquire ▾

Job Name

Job Description

User Name Jennifer Bowling

Data Area/ID TEST

Parameters

Process Level

Department

User Level

Supervisor

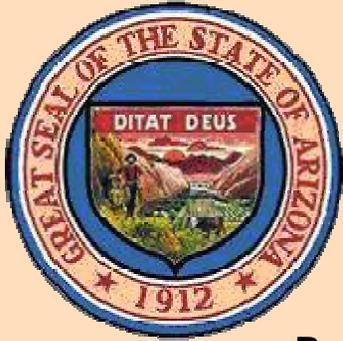
Location

Exclude,Include ▾

Status

Employee Group

Employee



LP262: EE Event Audit Report

The threshold can be defined as hours, consecutive days or a selected day.

Parameters of LP262 (Cont'd)

Employee Event Audit Report (LP262)

>> + Add ✎ Change - Delete ◀ Previous ? Inquire ▶ Next | Inquire ▾

Job Name

Job Description

User Name Jennifer Bowling

Data Area/ID

Parameters

Threshold Type Consecutive Days

Hours

Points

Occurrences

Consecutive Days

Specific Day

Day Indicator

Friday,Monday



LP262: EE Event Audit Report

Results of LP262

Employee Event Audit Report

LP262 Date 03/23/12
Time 13:57

Company 1 STATE OF ARIZONA
Employee Event Audit Report

Page 1

| Employee Name | Status | Supervisor Union | Total Days |
|---------------|--------------|------------------|------------|
| [REDACTED] | PERMANENT FT | DC24T60210 X | 2.00 |

| Date | Day | Reason Code | Hours | Points | Occurrence | Position | Proc Level | Dept | Job Code |
|------------|-----------|----------------------|-------|--------|------------|--------------|------------|-------|----------|
| 12/14/2011 | Wednesday | 310 SICK LEAVE TAKEN | 8.00 | | Yes | ADC00H398AAN | DC24T | 24TM0 | |
| 12/13/2011 | Tuesday | 310 SICK LEAVE TAKEN | 8.00 | | Yes | ADC00H398AAN | DC24T | 24TM0 | |
| 12/12/2011 | Monday | 310 SICK LEAVE TAKEN | 8.00 | | Yes | ADC00H398AAN | DC24T | 24TM0 | |
| 12/08/2011 | Thursday | 310 SICK LEAVE TAKEN | 8.00 | | Yes | ADC00H398AAN | DC24T | 24TM0 | ACV39003 |
| 12/07/2011 | Wednesday | 310 SICK LEAVE TAKEN | 8.00 | | Yes | ADC00H398AAN | DC24T | 24TM0 | ACV39 |
| 12/06/2011 | Tuesday | 310 SICK LEAVE TAKEN | 8.00 | | Yes | ADC00H398AAN | DC24T | 24TM0 | ACV39 |
| 12/05/2011 | Monday | 310 SICK LEAVE TAKEN | 8.00 | | Yes | ADC00H398AAN | DC24T | 24TM0 | ACV39 |
| 12/04/2011 | Sunday | 310 SICK LEAVE TAKEN | 8.00 | | Yes | ADC00H398AAN | DC24T | 24TM0 | ACV39 |



LP264: EE Transactions History Report

Generate a list of historical transactions for selected employees in a selected plan or plans. Only transactions that have been processed will appear on this report. Report is similar to the TA290

Parameters of LP264

Employee Transaction History Report (LP264)

>> + Add ✎ Change - Delete < Previous ? Inquire > Next | Inquire ▾

Job Name

Job Description

User Name Jennifer Bowling

Data Area/ID

Parameters

| Selection | Transactions |
|--------------------|--|
| Company | <input type="text" value="1"/> STATE OF ARIZONA |
| Absence Plan | <input type="text"/> |
| Structure Group | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| Excluded End Dates | <input type="text"/> |
| Processing Group | <input type="text"/> |
| Process Level | <input type="text"/> |
| Employee Group | <input type="text"/> |
| Employee | <input type="text" value="126074"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |



LP264: EE Transaction History Report

Parameters of LP264 (Cont'd)

Employee Transaction History Report (LP264)

>> + Add ✎ Change - Delete ◀ Previous ? Inquire ▶ Next | Inquire ▾

Job Name

Job Description

User Name Jennifer Bowling

Data Area/ID

Parameters

| Selection | Transactions |
|-------------------|---|
| Transaction Dates | <input type="text"/> -- <input type="text"/> |
| Transaction Type | <input type="text"/> |
| Balance Option | <input type="text"/> |
| Balance Type | <input type="text"/> |
| Year | <input type="text"/> |
| Report Option | <input type="text" value="1"/> Detail |
| Report Sequence | <input type="text" value="3"/> Process Level;Department |
| Employee Sequence | <input type="text"/> Use Company Default |



LP264: EE Transaction History Report

Results of LP264

| Employee Transaction History Report | | | | | | | | | |
|--------------------------------------|--------------------------|--|----------------------------|---------------|------------------|----------|--|--------|--|
| LP264 Date 03/23/12 | | Company 1 STATE OF ARIZONA | | | | | | Page 1 | |
| Time 14:25 | | Employee Transaction History Report - Detail | | | | | | | |
| Process Level: ADHRD | | AD-HUMAN RESOURCES DIVISION | | | | | | | |
| Department: HR710 | | HRIS STAFF | | | | | | | |
| Employee 126074 BOWLING, JENNIFER L. | | Plan ANNUAL | Structure Group LPANUNC1 | Position | | | | | |
| Tran Date | Description | Type | Balance Type | Hours Balance | Earnings Balance | Currency | | | |
| 02/17/12 | LP570 manual transaction | 03 | Available | 83.360000 | 0.000000 | | | | |
| 03/02/12 | Accrual | 21 | Accrual | 6.470000 | 0.000000 | | | | |
| 03/02/12 | Transfer to Available | 31 | Accrual | 6.470000- | 0.000000 | | | | |
| 03/02/12 | Transfer from Accrual | 33 | Available | 6.470000 | 0.000000 | | | | |
| Employee Totals | | Accrual Balance | | 0.000000 | 0.000000 | | | | |
| | | Allotment Balance | | 0.000000 | 0.000000 | | | | |
| | | Available Balance | | 89.830000 | 0.000000 | | | | |
| | | Carryover Balance | | 0.000000 | 0.000000 | | | | |
| | | Reserve Balance | | 0.000000 | 0.000000 | | | | |
| Employee 126074 BOWLING, JENNIFER L. | | Plan FAMILYSICK | Structure Group LPSKFAM | Position | | | | | |
| Tran Date | Description | Type | Balance Type | Hours Balance | Earnings Balance | Currency | | | |
| 02/17/12 | LP570 manual transaction | 03 | Available | 40.000000 | 0.000000 | | | | |
| Employee Totals | | Accrual Balance | | 0.000000 | 0.000000 | | | | |
| | | Allotment Balance | | 0.000000 | 0.000000 | | | | |
| | | Available Balance | | 40.000000 | 0.000000 | | | | |
| | | Carryover Balance | | 0.000000 | 0.000000 | | | | |
| | | Reserve Balance | | 0.000000 | 0.000000 | | | | |
| Employee 126074 BOWLING, JENNIFER L. | | Plan SICK | Structure Group LPSKSTAND1 | Position | | | | | |
| Tran Date | Description | Type | Balance Type | Hours Balance | Earnings Balance | Currency | | | |
| 02/17/12 | LP570 manual transaction | 03 | Available | 63.600000 | 0.000000 | | | | |
| 03/02/12 | Accrual | 21 | Accrual | 3.700000 | 0.000000 | | | | |
| 03/02/12 | Transfer to Available | 31 | Accrual | 3.700000- | 0.000000 | | | | |
| 03/02/12 | Transfer from Accrual | 33 | Available | 3.700000 | 0.000000 | | | | |
| Employee Totals | | Accrual Balance | | 0.000000 | 0.000000 | | | | |
| | | Allotment Balance | | 0.000000 | 0.000000 | | | | |
| | | Available Balance | | 67.300000 | 0.000000 | | | | |
| | | Carryover Balance | | 0.000000 | 0.000000 | | | | |
| | | Reserve Balance | | 0.000000 | 0.000000 | | | | |



Code Definitions

Transaction Types

Manual Entries (LP70)

- (03 Adj Available)

System Entries (LP64.1, LP64.2, LP64.3)

- (21) Accrual
- (22) Allotment
- (31) Transfer from Accrual
- (32) Transfer from Allotment
- (33) Transfer to Available from Accrual
- (34) Transfer to Available from Allotment

Status

LP64.1, LP64.3

- (0) Unprocessed
- (9) Closed

Balance Types

LP64.1, LP64.2, LP64.3

- (11) Accrual Hours
- (12) Allotment Hours
- (13) Available Hours
- (14) Reserve Hours
- (15) Carryover Hours
- (21) Accrual Earnings (not used by SOA)
- (21) Allotment Earnings (not used by SOA)
- (23) Available Earnings (not used by SOA)
- (24) Reserve Earnings (not used by SOA)
- (25) Carryover Earnings (not used by SOA)

Accrual Types

(LP64.1, LP64.2, LP64.3)

- (1) Hours
- (2) Earnings Hours (not used by SOA)

Allotment Types

- Donated Leave
- Family Sick
- Personal Leave
- Recognition Leave
- Comp Excluded
- FMLA



SUPPORT

If you have questions, please contact the HRIS Help Desk at 602.542.4700 or hrihelpdesk@azdoa.gov

Payroll Personnel – Please stay for additional slides



LP70.1: Manual Transactions by Employee

Use Manual Transactions by Employee (LP70.1) to adjust balances in one or more specific plan for the selected employee. Form is similar to TA70.2

Manual Transactions by Employee (LP70.1)

» + Add Change Previous ? Inquire Next | Inquire ▾

Company STATE OF ARIZONA
 Employee BOWLING, JENNIFER L.

Similar to the TA70.2

Position To

| FC | Plan Position | Struct Grp Tran Date | Amount Amount Type | Transaction Type Description | Status |
|--------------------------|----------------------|-------------------------|-----------------------|---|--------|
| <input type="checkbox"/> | ANNUAL | LPANUNC1 | 100 | 03 Adj Available Annual Leave Adjustment | |
| | <input type="text"/> | 03/21/2012 | 1 Hours | | |
| <input type="checkbox"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| <input type="checkbox"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| <input type="checkbox"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| <input type="checkbox"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| <input type="checkbox"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |

Select **Plan** via the drop down box, then the **Structure Group** will default

Enter **Amount** – if negative, enter symbol before or after integer

Select **Transaction Type** (always will be Adj Available)

Enter **Date** the transaction occurred

Select the **Amount Type** (always will be hours)

Enter **description**

TIP: To duplicate information in a field, put cursor into the blank field and click Shift F2. This will copy the information from the field above. This is especially useful when you are entering in many transactions.



LP70.2: Manual Transactions by Plan Structure

Use Manual Transactions by Plan Structure (LP70.2) to adjust balances for a specific plan on multiple employees. Form is similar to TA70.1

Select **Plan** via the drop down box, then the **Structure Group** will default

Enter **EIN**

Enter **Amount** – if negative, enter symbol before or after integer

Select the **Amount Type** (always will be hours)

Select **Transaction Type** (always will be Adj Available)

Enter **Date** the transaction occurred

Enter **description**

Manual Transactions by Plan Structure (LP70.2)

» + Add ✎ Change ◀ Previous ? Inquire ▶ Next | Inquire ▾

Company STATE OF ARIZONA
 Plan ANNUAL LEAVE PLAN
 Structure Group LP ANN UNCOVERED FT_6.47

Position To

| FC | Employee | Amount | Amount Type | Transaction Type | Position |
|----|----------------------|---|--------------------------------------|--|----------------------|
| | | <input type="text" value="126074"/> | <input type="text" value="1"/> Hours | <input type="text" value="03"/> Adj Available | <input type="text"/> |
| | BOWLING, JENNIFER L. | <input type="text" value="100"/> | <input type="text" value="1"/> Hours | <input type="text" value="03"/> Adj Available | <input type="text"/> |
| | | <input type="text" value="03/21/2012"/> | | <input type="text" value="Annual Leave Adjustment"/> | |
| | | <input type="text" value="126075"/> | <input type="text" value="1"/> Hours | <input type="text" value="03"/> Adj Available | <input type="text"/> |
| | BOLIN, KRISTY K. | <input type="text" value="100"/> | <input type="text" value="1"/> Hours | <input type="text" value="03"/> Adj Available | <input type="text"/> |
| | | <input type="text" value="03/21/2012"/> | | <input type="text" value="Annual Leave Adjustment"/> | |
| | | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| | | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Similar to the TA70.1

TIP: To duplicate information in a field, put cursor into the blank field and click Shift F2. This will copy the information from the field above. This is especially useful when you are entering in many transactions.



LP270: Open Manual Transactions

Run Open Manual Transaction Listing to list transactions created with Manual Transactions (LP70.1 or LP70.2).

Parameters of LP270

Open Manual Transactions (LP270)

> + Add Change - Delete < Previous ? Inquire > Next | Inquire ▾

Submit Reports Job Sched Print Mgr

Job Name LP270

Job Description OPEN MANUALS

User Name adbowlj Jennifer Bowling

Data Area/ID TEST

Parameters

Company 1 STATE OF ARIZONA

Plan ANNUAL ANNUAL LEAVE PLAN

Structure Employee Group LPANCV1 LP ANN COVERED FT_3.70

Processing Group

Process Level

Report Sequence 1 Plan;Structure

Employee Sequence 1 Alpha



LP270: Open Manual Transactions Report

Run Open Manual Transaction Listing to list transactions created with Manual Transactions (LP70.1 or LP70.2).

Results of LP270

Open Manual Transactions

```

LP270 Date 03/28/12          Company 1 STATE OF ARIZONA          Page 1
      Time 16:02              Open Manual Transaction Listing

Accrual Plan  ANNUAL          ANNUAL LEAVE PLAN
Structure Group LPANUNC1      LP ANN UNCOVERED FT_6.47

Employee ----- Position ----- Transaction Amount  Amt
----- Type Date ----- Transaction Type, Description -----
[REDACTED] 72.550000 1 02/17/2012 03 LP570 manual transaction

Plan Structure Totals 1 records processed      Hours 72.5500
Earnings 0.0000 USD
  
```