USING BANNER TO ADMINISTER PARENTAL LEAVE

SHARED SERVICE CENTER
January 2020

Agenda

Parental Leave Policy

Banner Process

System Functionality

FML Non-Parental

Banner Implementation Planning

THE **UNIVERSITY** OF
NORTH CAROLINA SYSTEM

Policies

- UNC System Policy

- SHRA Policy
- EHRA Policy
- FAQs

https://myapps.northcarolina.edu/hr/benefits-leave/leave-benefits/

Institution Faculty Serious Illness policy coordinates with Parental Leave. Understand which employees are covered under Faculty Serious Illness.
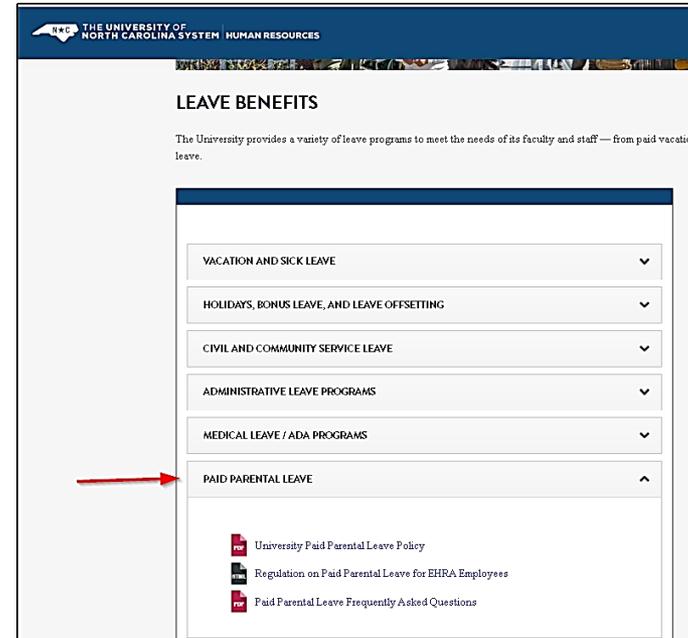
Eligible Employee
Paid Parental Leave

- Eligible for Family Medical Leave
  - Continuously employed for immediate preceding 12 months
  - In pay status at least 1040 hours in previous 12 months
  - Temporary employment counts towards required 12 months of continuous employment (includes student employment, graduate assistantships and postdoctoral fellowships)

- And, full-time or part-time (half time or more) in a permanent, probationary or time-limited position at time of Qualifying Life Event

- And, employee cannot be eligible for institution Faculty Serious Illness benefits

- Eligibility ends when an employee transfers to an ineligible position

- Effective January 1, 2020
  - Institutions must implement between January 1 – April 30

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Faculty Serious Illness Policy

- Non-leave earning faculty not eligible for Paid Parental leave

  - Have a substantially equivalent benefit under the Faculty Serious Illness policy

  - Specifics of each campus' Faculty Serious Illness may vary but are under guidelines established by UNC Policy Manual, Sections 300.2.11 and 300.2.11[G]

- Any other faculty covered by Faculty Serious Illness and Disability policy are <u>not eligible</u> for Paid Parental Leave

Q: Can an employee be eligible for FML and not be eligible for Parental Leave?

A: Yes. A temporary employee could be FML eligible. Temporary employees are not eligible for Parental Leave.

Also, a permanent employee eligible for FML may be covered under Faculty Serious Illness and therefore not be eligible for Parental Leave

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Retroactive Eligibility

- Implementation includes a retro period to 9/1/2019 for 'Bonding Leave' <u>only</u>

- If an otherwise qualifying event occurred on or after September 1, 2019, but prior to your institution's implementation date

   AND

- Employee met the eligibility requirements as of the QLE date, then the EE would be eligible to apply 4 weeks of Bonding leave prospectively within the remainder of the 12-month period after the QLE

- Leave CANNOT be applied retroactively to replace paid or unpaid leave that the employee may have used for the QLE prior to your institution's implementation of this policy

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Benefit

- 4 weeks of recuperation leave (160 hours *FTE) for birth of a child
  - Birth parent must use immediately following the birth
  - University policy covers stillbirth at 20 weeks + (not covered under the OSHR policy)
- 4 weeks of bonding leave (160 hours * FTE)
  - Birth parent
  - Non-birth parents, adoption, foster or other legal placement
  - Must use within first 12 months of birth or placement
- Cannot use intermittently. Must use as a continuous block of time
- 100% of regular, straight time pay
- Cannot use prior to Qualifying Life Event (birth)
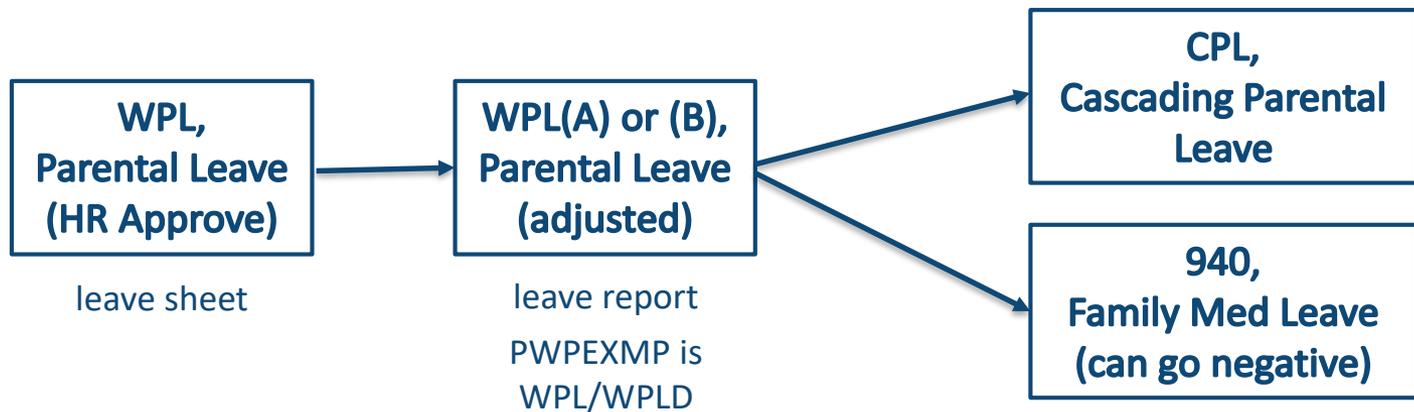
Interaction with FML

- Employee must be eligible for Family & Medical Leave

- Parental Leave runs concurrent with Family & Medical Leave

- If Family Medical Leave is exhausted, employee still eligible for Parental Leave (if he or she otherwise meets Parental Leave eligibility criteria)

- When used concurrent with FML, Paid Parental Leave must be applied first prior to vacation, bonus, sick leave or LWOP

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Parental Concurrent With FML
Leave System Tracking

Parental Leave and FML run concurrently.

To track both, Parental Leave entered by employee on leave sheet crosswalks to <u>two</u> earn codes.

```
┌─────────────────┐      ┌─────────────────┐                ┌─────────────────────┐
│ WPL,            │      │ WPL(A) or (B),  │         ┌─────→ │ CPL,                │
│ Parental Leave  │ ───→ │ Parental Leave  │ ────────┤      │ Cascading Parental  │
│ (HR Approve)    │      │ (adjusted)      │         │      │ Leave               │
└─────────────────┘      └─────────────────┘         │      └─────────────────────┘
                                                     │
     leave sheet            leave report            │      ┌─────────────────────┐
                                                     └────→ │ 940,                │
                            PWPEXMP is                      │ Family Med Leave    │
                            WPL/WPLD                        │ (can go negative)   │
                                                            └─────────────────────┘
```

Leave interfaces reduce both the Parental Leave accrual and the FML accrual. FML can go negative in Banner for Parental Leave.

Q: Is Employee eligible for Parental Leave if all FML hours exhausted prior to birth?

1. Employee on FML due to QLE (not related to a birth), 6/1/2019

2. Uses all 480 hours of FML as of Aug 30

3. Birth 2/1/2020 however, no FML hours available

A: Yes. If employee otherwise meets eligibility criteria (meet FML criteria, perm, probationary or TL). FML hours can go into the 'negative' for Parental Leave

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Employee Leave Request

- Employee must request Parental Leave in writing

- Leave request must be signed by both management and employee

- Employee is required to submit documentation to HR to support the Parental Leave request

- REMINDER: PROTECT the medical certification during this process (should not ever go to management)

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BANNER PROCESS

Banner Steps

1. Enter FML and Parental Leave eligibility dates in PWABEAD.
   - This is the date of the authorizing QLE
2. Accrue eligible FML (XFML) & Parental Leave (PLRC and/or PLBD) hours in PEALEAV
3. Run leave reports in Hours/Trial/Report modes prior to payroll handoff Review and correct comments.
4. Run leave reports in Update mode and confirm issues are resolved
5. Run Audit (PWRXAUD)
6. Use WebFocus report to track end of eligibility periods
7. Adjust PEALEAVE for XFML, PLRC and/or PLBD at end of eligibility period

Parental Leave Example

- Birth mother

- Birth January 20

  o Set up manually for Feb payroll, SB4 (Jan 20-Feb 2). Processed in Feb payroll

- Example is for March payroll

  o SB5 and SB6, Feb 3 – March 1

	Initial Accrual	Leave Taken in Feb Payroll	Balance Available
PLBD – Bonding	160	0	160
PLRC - Recuperation	160	80	80
XFML – Family Med Lv	480	80	400

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PWABEAD
Enter Eligibility Dates

- Eligibility date for both Parental Leave Recuperation and Parental Leave Bonding is the date of birth

- Track eligibility end dates with WebFOCUS report

- FMLA Start Date applies to Parental Leave & other QLEs

Q: Is the FML QLE date the same as the Parental Leave QLE date?

A: It depends.

- If the employee has no other qualifying medical issues, the date of the birth is the FML QLE date.

- If the employee had an FML event within past year, FML date is date of earlier QLE.

- The Parental Leave QLE date is always the date of the birth.

PEALEAV

Accrue Hours

Manually enter initial accrual in PEALEAV
- Parental Leave Bonding (PLBD)
- Parental Leave Recuperation (PLRC)
- Family Medical Leave (XFML)

	Accrued	Taken	Balance
PLBD	160	0	160
PLRC	160	80	80
XFML	480	80	400

Leave Code *	Leave Code Description	Date Available *	Day or Hour	Begin Balance Hours *	Accrued Hours *	Taken Hours *	Current Available Hours *	B
INCT	Incent	03/15/2006	H	0.00	0.00	0.00	0.00	
MILI	Military	03/01/2006	H	0.00	0.00	0.00	0.00	
OCCT	OCCT	03/15/2006	H	0.00	0.00	0.00	0.00	
PLBD	PrLvBond	03/01/2006	H	0.00	160.00	0.00	160.00	
PLRC	PLvRecup	03/01/2006	H	0.00	160.00	80.00	80.00	

Leave Code *	Leave Code Description	Date Available *	Day or Hour	Begin Balance Hours *	Accrued Hours *	Taken Hours *	Current Available Hours *
XFML	FamMedLv	03/01/2006	H	0.00	480.00	80.00	400.00

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Employee Completes Leave Report

- Employee enters '*Parental Leave (HR Approved)' (*WPL) hours on leave sheet

- FML used for Parental Leave is not entered on leave sheet, it is system calculated

'H' Mode
Leave Report

H mode lists all hours entered on leave sheet

- o Use to verify leave was entered as expected
- o Verify no intermittent Parental Leave used

PARAMETER VALUES		
Number *	**Parameters**	**Values**
01	Run Mode	H
02	Payroll Year	2020
03	Payroll Month	3
04	Log Message Level	I
05	Banner ID / Org Code	888888888
06	SB Cycle (Pay Period)	

◄ ◄ 1 of 1 ► ► | 10 ▼ Per Page

LENGTH: 1 TYPE: Character O/R: Required M/S: Single
Enter Run Mode (R=Report U=Update T=Trial O=Org H=Hours/ID Only)

```
CODE=WPL   DATE=02/10/2020   TIME=8
CODE=WPL   DATE=02/11/2020   TIME=8
CODE=WPL   DATE=02/12/2020   TIME=8
CODE=WPL   DATE=02/13/2020   TIME=8
CODE=WPL   DATE=02/14/2020   TIME=8
```

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Leave Report Comments
Parental Leave

Comment	What it Means	Action Required by Leave Administrator
Insuf XFML	The XFML bucket on PEALEAV does not have enough available hours	Review record. FML allowed to go negative with Parental Leave. FML cannot go negative with non-parental FML.
Insuf Par Lv	The PLRC and/or PLBD bucket on PEALEAV does not have enough available hours	Review record to ensure PLRC/PLBD hours have been accrued. If hours accrued return for correction. If not returned, hours will cascade to other leave buckets. Will dock pay if no other leave hours.
Parental Leave Taken Prior Par Lv Start Date	Parental Start Date (QLE date) not entered on PWABEAD. Or, Parental Leave entered on leave sheet prior to PWABEAD Parental Start Date (QLE date)	1. Enter or correct Parental Start Date (QLE date) on PWABEAD or 2. Return Leave Sheet for correction. Parental Leave cannot be taken before birth QLE
Parental Leave Taken Prior FMLA Start Date	FMLA Start Date (FML QLE date) not entered on PWABEAD. Or, Parental Leave entered on leave sheet prior to PWABEAD FMLA Start Date (QLE date)	1. Enter or correct FMLA Start Date (QLE date) on PWABEAD or 2. Return Leave Sheet for correction. Parental Leave Cannot be taken prior to FMLA Start Date
FMLA Taken Prior Start Date	FML Start Date (FML QLE) not entered	1. Enter or correct FMLA Start Date (QLE date) on PWABEAD or 2. Return Leave Sheet for correction

Parental Leave (WPL) Summary
Leave Report

List of employees taking Parental Leave (WPL) is listed separately on leave report
- Quick identification of employees on Parental Leave
- Compare to list of employees approved for Parental Leave
- Could identify employee using Parental Leave on intermittent basis (intermittent not allowed)

```
                          WPL SUMMARY

              [Parental Leave (HR Approved)        ]


     ID               NAME              ORG      ORIG HRS (IN)    ADJ HRS (OUT)

  ---------    ------------------------  -------  -------------    -------------

                                                      160.00           160.00

                                                      160.00           160.00
```

Leave Report Crosswalk

Hours entered on leave sheet crosswalk to two earn codes

- CPL, Cascading Parental Leave and
- 940, FML Hours Used

PWRXAUD

Audit

```
REPORT: PWRXAUD (B) 1.0.6                    University                                    DATE: 01/09/20
 DBASE: GATEST2                              XTIME AUDIT                                    TIME: 13:47:26
  USER: [UNCGA_BROWN]   YR: 2020  MTH: 3   PAY ID: MN  VSUM:     BAN ID: 888888888  CLS: E1,E2,EN,F2,LE,SE,SN    PAGE: 00001


                                       XTIME  XTIME   PR   PR    PR          Reg Hr Reg Hr
         Name            Banner ID Appt  Pos #  CLS Code  Hrs/Amt DISP Code  Hrs/Amt  FTE  Expect Actual         COMMENT
  ----------------------- ---------- ---- ------- --- ---- -------- ---- ---- -------- ----- ------ ------ -------------------------
  ██████ ███ ███          888888888  12  000071  SN              60                   1.000 173.33 173.33 AUDIT SUCCESSFUL
                                                     TCA    160.00     TPC   160.00
                                                     940    160.000    940   160.000                 OK
                            SOURCE             DATE              REC CNT                MESSAGE
                            --------    ----------------------   -------    ------------------------------------
                            EXEMPT                                          NO AUDIT RECORDS DETECTED
                            LAW                                             NO AUDIT RECORDS DETECTED
                            MOVE                                            NO AUDIT RECORDS DETECTED
                            SMART       01/08/2020 07:57:07 PM      4       ** USED FOR AUDIT REPORTING
                            SMART       01/07/2020 07:07:22 PM      2       LATER RUN DETECTED / RECS IGNORED
```

PEALEAV
Employee Balances After March Payroll

System updates 'taken hours' during March payroll processing

After February payroll

	Accrued	Taken	Balance
PLBD	160	0	160
PLRC	160	80	80
XFML	480	80	400

After March payroll

	Accrued	Taken	Balance
PLBD	160	80	80
PLRC	160	160	0
XFML	480	240	240

Employee Check
PHICHEK

- Earn Code 260 pays Parental Leave Recuperation
- Earn Code 261 pays Parental Leave Bonding
- Earn Code 940 <u>hours</u> of FML taken, no wages

✕ ⊘ ellucian Check Detail Inquiry PHICHEK 9.3.9 (GATEST2)						ADD RETRIEVE RELATED TOOLS

ID: ▓▓▓▓▓ ▓▓ ▓▓ ▓▓ ▓▓▓r Year: 2020   Payroll ID: MN   Payroll Number: 3   Sequence Number: 0   **Start Over**

▼ CHECK DETAIL INQUIRY   ➕ Insert ➖ Delete 📋 Copy ▽ Filter

Gross	3,215.50		Disposition	60 Finance Extract
Net Amount	2,143.49		Unemployment Insurance Weeks	
Deductions	1,072.01		Unemployment Insurance Exception Indicator	

▼ EARNINGS INFORMATION   ➕ Insert ➖ Delete 📋 Copy ▽ Filter

Assignment	Assignment Description	Earnings	Earnings Description	Shift	Effective Date	Hours or Units	Rate	Amount
000071	00	100	Regular	1	07/01/2019	13.33	15.720930	209.56
000071	00	260	PLvRecup	1	07/01/2019	80	15.721456	1,257.72
000071	00	261	PrLvBond	1	07/01/2019	80	15.721456	1,257.72
000071	00	900	Lngvity	1	07/01/2019	173.33	2.829862	490.50
000071	00	940	FMLA Tkn	1	07/01/2019	160	0.000000	0.00
000071	00	CPL	CPrnLv	1	07/01/2019	0	15.721456	0.00

|◀ ◀ ⬚1 of 1 ▶ ▶| 10 ▾ Per Page   Record 1 of 6

Parental Leave End of Eligibility

- Employee may not take all of eligible leave

- Reminder

  o PLRC, Recuperation must be taken at time of birth

  o PLBD, Bonding must be taken within one year of birth

  o Parental Leave cannot be used intermittently

- If current available hours have expired, adjust PLRC/PLBD Accrued Hours so balance equals zero

- If FML leave has expired or is negative, adjust XFML hours so balance equals zero

FAMILY MEDICAL LEAVE

Non-Parental

FML Non-Parental

- New leave interfaces track non-parental FML leave

- Employee enters "FML Non-Parental (HR Approved)" on leave sheet. This is the WFM earn code

  o Employee does NOT enter any other leave time, e.g. Vacation or sick

  o The system will cascade the "FML Non-Parental (HR Approved)" through the Cascading Voluntary Shared Leave cascade (ZCSL). Any relevant available leave will be used to pay employee.

PWABEAD
FML Non-Parental

Enter FMLA Start Date on PWABEAD

Crosswalk and Cascade
FML Non-Parental

EHRA ZCSL cascade

FML hours (non-parental) entered on leave sheet cascade through Shared Leave cascade to pay employee

Leave Category Rules PTRLCAT 9.3.3 (GASTMO)

Leave Category: E1 EHRA 17.33 12 month   Leave Code: ZCSL Cascading Voluntary Shared Lv   Leave Report Indicator: Leave   Day or Hour Indicator: Hour

LEAVE CODE PRIORITIES

Sequence Number *	Next Leave Code *	Next Leave Description	Ea	
1	SICK	Sick	2	
2	SPLV	Special Leave	256	Special Leave Taken
3	SPL2	Special Annl Leave Bonus 2	257	Special Leave 2 Taken
4	VACA	Vacation	200	Vacation
5	BONU	Bonus Leave	250	Bonus Leave
6	SHAR	Voluntary Shared Leave	225	Voluntary Shared Leave Taken
7	DOCK	Dock Leave Overage	500	Dock Pay

1 of 1   10 ▼ Per Page

SHRA ZCSL cascade

Leave Category Rules PTRLCAT 9.3.3 (GASTMO)   ADD   RETRIEVE   RELATED   TOOLS

Leave Category: S1 SHRA 12 month   Leave Code: ZCSL Cascading Voluntary Shared Lv   Leave Report Indicator: Leave   Day or Hour Indicator: Hour   **Start Over**

LEAVE CODE PRIORITIES   Insert   Delete   Copy   Filter

Sequence Number *	Next Leave Code *	Next Leave Description	Earnings Code *	Earnings Description
1	SICK	Sick	205	Sick
2	OCCT	On Call Comp Time	417	On Call Comp Time Taken
3	CTOT	Comp 1.5x	416	Comp Time Taken 1.5x
4	CTGP	Comp 1x	415	Comp Time Taken 1.0x
5	CTEX	Comp 1.0x - Exempt	414	CompTime Taken - Exempt
6	CTUC	Emergency Event Comp Time	418	Emergency Event Hours Taken
7	INCT	Incentive Leave	252	Incentive Leave
8	SPLV	Special Leave	256	Special Leave Taken
9	SPL2	Special Annl Leave Bonus 2	257	Special Leave 2 Taken
10	VACA	Vacation	200	Vacation
11	BONU	Bonus Leave	250	Bonus Leave
12	SHAR	Voluntary Shared Leave	225	Voluntary Shared Leave Taken
13	DOCK	Dock Leave Overage	500	Dock Pay

1 of 1   20 ▼ Per Page   Record 1 of 13

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Administering FML

- Modifications have been made to configuration of WFM, Family Medical Leave Taken from what was distributed January 2019

- Notify aebrown@northcarolina.edu if you implemented WFM prior to Parental Leave

- Will need to transition current WFM setup to new setup

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SYSTEM FUNCTIONALITY

New System Codes

- Leave codes

PLBD	Parental Leave Bonding
PLRC	Parental Leave Recuperation
ZCPL	Leave Report Hours Taken

- New cascade required for each leave earning LCAT
  - E1, E2, E3, E4, E5, E6, E7, S1, S3, S4, S5, S6 and S7

- Earn codes

260	Parental Leave Recuperation
261	Parental Leave Bonding
940	FML Hours Used – tracks FML hours both Parental and Non-Parental. Not associated with pay
CPL	Cascading Parental Leave
WPL	Parental Leave (HR Approved)

FML System Codes

- ## Leave codes

XFML	Family Medical Leave

- ## Earn codes

WFM	FML Non-Parental (HR Approved)
940	FML Hours Used – tracks FML hours both Parental and Non-Parental. Not associated with pay

System runs WFM hours through Shared Leave Cascade to pay employee

Put sequence at end of leave sheet or leave off and coordinate directly with employee

Employee Leave Entry

- Employee enters Parental Leave on leave sheet

  - Banner reduces Recuperation or Bonding leave balances through leave sheet and payroll process

- Balances managed through PEALEAV accruals, system cascades and crosswalks

  - If non-birth parent, HR accrues only Bonding

  - If birth parent, HR accrues BOTH Recuperation and Bonding Leave

  - System uses Recuperation first (if available) and Bonding if there is no Recuperation

PLRC Cascade

- Excess Parental Leave, Recuperation (PLRC) taken cascades to Parental Leave, Bonding (PLBD)
- Then excess taken cascades to other relevant leave

Sequence Number *	Next Leave Code *	Next Leave Description	Earnings Code *	Earnings Description
1	PLBD	Parental Leave Bonding	261	Parental Leave Bonding
2	OCCT	On Call Comp Time	417	On Call Comp Time Taken
3	CTOT	Comp 1.5x	416	Comp Time Taken 1.5x
4	CTGP	Comp 1x	415	Comp Time Taken 1.0x
5	CTEX	Comp 1.0x - Exempt	414	CompTime Taken - Exempt
6	CTUC	Emergency Event Comp Time	418	Emergency Event Hours Taken
8	SPL2	Special Annl Leave Bonus 2	257	Special Leave 2 Taken
9	SPLV	Special Leave	256	Special Leave Taken
10	VACA	Vacation	200	Vacation
11	BONU	Bonus Leave	250	Bonus Leave
12	DOCK	Dock Leave Overage	500	Dock Pay

PLBD Cascade

- Excess Parental Leave, Bonding (PLBD) taken cascades directly to other relevant leave

	X @ ellucian Leave Category Rules PTRLCAT 9.3.3 (GATEST2)			ADD	RETRIEVE	RELAT
Leave Category: S1 SHRA 12 month Leave Code: PLRC Parental Leave Recuperation Leave Report Indicator: Leave Day or Hour Indicator: Hour						
▾ LEAVE CODE PRIORITIES					Insert	Delete
Sequence Number *	Next Leave Code *	Next Leave Description		Earnings Code *	Earnings Description	
1	PLBD	Parental Leave Bonding		261	Parental Leave Bonding	
2	OCCT	On Call Comp Time		417	On Call Comp Time Taken	
3	CTOT	Comp 1.5x		416	Comp Time Taken 1.5x	
4	CTGP	Comp 1x		415	Comp Time Taken 1.0x	
5	CTEX	Comp 1.0x - Exempt		414	CompTime Taken - Exempt	
6	CTUC	Emergency Event Comp Time		418	Emergency Event Hours Taken	
8	SPL2	Special Annl Leave Bonus 2		257	Special Leave 2 Taken	
9	SPLV	Special Leave		256	Special Leave Taken	
10	VACA	Vacation		200	Vacation	
11	BONU	Bonus Leave		250	Bonus Leave	
12	DOCK	Dock Leave Overage		500	Dock Pay	

Reporting

- Report usage of Paid Parental Leave to the UNC System Office by August 1

  o For leave taken in the preceding fiscal year

  o System Office will provide standard model WebFocus report for this reporting requirement when OSHR provides the reporting requirements

  o System Office will report university leave usage to OSHR

- WebFOCUS reports to be developed

  o OSHR report

  o Managing Parental Leave and FML

BANNER
IMPLEMENTATION PLANNING

System Updates

- To process Parental Leave must install updated time/leave versions:
    - PWPSMRT, SmartTime v2.2.0
    - PWPLAWT, LawTime v2.1.7
    - PWPEXMP, ExemptTime v1.0.2
    - PWRXAUD, Audit Time v1.07
    - Estimated release by end of January
- PWABEAD update (with associated NWABPAD update)
- WebFocus Reports - TBD
- Evisions update if needed (campus specific)

System Configuration for Testing

The configuration setup is very lengthy. For testing an abbreviated setup is acceptable

	Codes	Complete the Full Setup
PTRLEAV	PLBD, PLRC, ZCPL	Yes
PTREARN	260, 261, 940, WPL, CPL	Yes
PTRECLS , Eligible Earnings	E1, E2, EN, F2 or SE; LE; SN	Pick at least one employee class per leave system to test. Min one each for PWPSMRT, PWPLAWT and PWPEXMP
PTRPCAT		Yes
PTRLCAT	PLRC - 2 or 3 LCATS; PLBD - same 2 or 3 LCATS; ZCPL – same 2 or 3 LCATS	Pick at least one leave category (LCAT) that will correspond with the eclasses selected to test
PTREARN and PTRECLS	WFM	Yes

Suggested Testing Steps

1. Identify employees from multiple e-classes (SMART, EXMPT and LAW)
    - o Consider including multiple Leave Categories (LCATS)

2. Select leave periods not used by employee in NON-PROD. Determine leave periods to feed into payroll, e.g. SB03 and SB04 feed into MN02 payroll.

3. Review PTRCALN for leave entry and supervisor approval deadline dates. Modify dates in NON-PROD if needed to allow entry for testing

4. Go to GOATPAD and reset employee password for leave sheet to a testing default, e.g. '111111'

5. If you are not a super user, change super user password to a testing default in GOATPAD.

6. Enter FML and PL Start Dates on PWABEAD

7. PEALEAV, enter Accrued Hours (PLBD, PLRC, XFML) to generate a Beginning Balance

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Testing, cont

8. Enter Parental Leave hours on employee leave sheet based on test plan. Example test scenarios:
   - Standard scenario. Employee has PLRC/PLBD balances to cover Parental Leave
   - Employee enters more Parental leave than accrued
   - Employee takes Parental Leave before BEAD Parental Start Date and/or BEAD FMLA Start Date

9. Submit test employee hours for approval

10. Approve employee hours as super user

11. Run PWPSMRT, PWPLAWT, PWPEXMP and PWRXAUD
    - Run in Hours/Trial or Report Modes then Update Mode
    - Review output
    - Verify version number

12. Run payroll for test month

13. Review check for expected Parental Leave earn codes

14. Review PEALEAV to verify leave balance adjusted

Implementation Timeline

- Paid Parental Leave policy implemented
  - No earlier than January 1, 2020 and
  - No later than April 30, 2020
- CAB Configuration changes implemented by April 10, 2020
- Institution decision on when to implement
- Consider leave calendar when deciding the implementation date

Leave Taken for March Payroll

SmartTime Leave Taken Dates for March Payroll

| Year | Period | Payroll | Calendar Days Cover | | Submit Deadline | Approve Deadline | View Bal on WEB | Vac and Sick Accrual thru | Comp Accr & Lv Taken Thru |
			From	To					
2020	SB 05	MN03	2/3/20	2/16/20			March 25	March	March 1, 2020
2020	SB 06	MN03	2/17/20	3/1/20			March 25	March	March 1, 2020

LawTime Leave Taken Dates for March Payroll

| Year | Lv Period | Payroll | Calendar Days Covered | | Submit Deadline | Approve Deadline | View Bal on WEB | Vac and Sick Accrual Thru | Comp Accr & Lv Taken Thru |
			From	To					
2020	L4 02	MN 03	01/20/20	02/16/20			March 25	March	February 16, 2020

ExemptTime Leave Taken Dates for March Payroll

| Lv Period | Payroll | Calendar Days Covered | | Submit Deadline | Approve Deadline | View Bal on WEB | Vac and Sick Accrual Thru | Comp Accr &Lv Taken Thru |
		From	To					
MN02	MN03	02/01/20	02/29/20			March 25	March	February 29, 2020

Handling Manually Before Systems Installed Employee

o   Before systems installed…

o   Leave Admins should advise employees using Parental Leave on completing timesheet

o   Employee should not key any hours for days they are using approved Parental Leave

o   Instead, employee adds a COMMENT stating dates and hours using Parental Leave

o   Supervisor approves (first level approval only). If there is only one approval level, the Leave report should be deleted, 2nd level (superusers) added and hours rekeyed

Handling Manually Before Systems Installed
Leave Admin

- To Update PEALEAV
  - Accrue hours to PLRC, PLBD and XFML buckets as appropriate
  - "Take" hours from appropriate buckets (PLRC, PLBD, XFML)
- To process time sheet
  - Leave Admin keys hours in "Other Leave" based on employee's comment
  - Runs process in Trial Mode to be sure there are no "Short Hours" on SMART or LAW due to parental leave
  - Give Superuser Approval and process through payroll

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Handling Manually
Payroll

- No Parental Leave Hours would run through Payroll

- Schools can decide whether to leave the "Other LEAVE" hours in Payroll.

  - If left, they will reduce regular hours and pay from code 238.

  - If removed, there will be no mention of the hours in Payroll, and all hours will pay from code 100.

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QUESTIONS?

THANK YOU