

Pandemic Premium Pay and Comp Time Continuation

April 13, 2020

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Pandemic Added Compensation

Mandatory Employees Required to Work On-site

Overview

The configuration changes in this document provide a mechanism for permanent mandatory employees to track hours required to work on campus. These configuration changes do not support any additional compensation paid to temporary employees.

Eligibility

Source: Special Provisions for Mandatory Employees (rev 3/26/2020) distributed by UNC System Office Human Resources. As of the distribution date of this document, the authorized dates for using Pandemic Additional Compensation are 4/1-4/30/2020.

SHRA and EHRA mandatory permanent employees will receive added compensation for hours required to be worked at a designated University worksite other than their personal residence, and only for those specific dates and times that such on-site work is required; off-site (teleworking) hours will not be subject to these added special compensation provisions.

FLSA non-exempt mandatory employees will receive 1.5 times their hourly pay rate for all hours worked on-site. Those employees who work in excess of 40 hours per work week will also receive overtime compensatory time off at 1.5 hours for each hour worked over 40, per federal overtime rules.

FLSA exempt mandatory employees will receive 1.5 times their hourly pay rate for up to 40 hours worked on-site in a work week.

The following positions, even if designated mandatory, are excluded from these special compensation provisions:

- Tier I senior academic and administrative officers,
- Tier II senior academic and administrative officers,
- Faculty,
- Physicians,
- Directors and deputy directors of major institution-wide or school-wide functions and centers, department heads, division heads, research and academic department administrators, clinical and academic department administrators, clinical division administrators, and coaches and athletic administrators.

As the special pay provisions are not intended to be applied to executive or leadership positions, the institution shall have the discretion to exclude other highly compensated individuals who exercise leadership responsibilities of a designated department, division, or unit of the University who are not otherwise indicated above by classification or title.

The institution shall have the discretion to award added compensation or equivalent compensatory time resulting from COVID-19 as a lump sum payment, as a series of payments, as paid leave, or in any combination, within 12 months of the date of accrual. COVID-19 compensatory time is paid out based on the employee's hourly rate of pay.

These special compensation provisions will be subject to re-review as of April 30, 2020 taking into account continuing developments regarding COVID-19 and the availability of funds.

Directions to employees

Employees that are designated Mandatory during this Pandemic and required to work on-site should enter hours worked on-site on the leave sheet. Suggested guidance for these employees:

FLSA Exempt employees (salaried) – On the leave sheet, enter hours worked on campus, not to exceed 40 hours in one week (pro-rated for part-time) in the row, *Pandemic Mandatory Onsite Work (WPE)*. In addition, enter any leave taken as you normally would. (PWPEXMP)

FLSA Non-exempt employees- Enter all hours worked, leave taken and other entries as you normally would. In addition, enter hours worked on-site on or after April 1, in the row *Pandemic Mandatory Onsite Work*. (PWPSMRT and PWPLAWT)

Directions to leave administrators and payroll

The Pandemic Added Compensation can be paid or accrued as compensatory time at the discretion of the chancellor. We are collecting Pandemic Additional Compensation hours on the employee leave sheets. The new leave systems will not be in place for April payroll. When running the leave interfaces for the April payroll, WPE hours entered on the leave sheets will generate an unknown code warning. This will not impact the processing of the April leave sheets. These hours will be processed/managed after April payroll and before May payroll.

Paying Pandemic Added Compensation as Earned (no comp time)

If a campus is paying out Pandemic Added Compensation, the new earn code 709, *Pandemic Premium Pay .50*, should be used to pay hours as worked (no comp time created). The leave administrator must review WPE (*Pandemic Mandatory Onsite Work*) hours submitted and once approved manually transmit a list of total hours worked by employee to Payroll.

Payroll manually keys the hours in PHA HOUR using the new earn code 709. Banner will generate the payment to employees so that the amount paid is equivalent to .50x of hours worked. System and configuration changes will not be available for the April payroll. Time worked in April will need to be paid in May.

Generating Comp Time for Pandemic Hours Worked

If a campus is accruing comp hours for the Pandemic Added Compensation, several additional codes are being created. The hours entered on the leave sheet, once approved by the leave administrator must be manually accrued in PEALEAV by one of two methods by either the leave administrator or by payroll.

1. PEALEAV direct manual accrual (leave administrator). The new PAND bucket holds the pandemic comp hours. If the leave administrator is manually accruing the hours directly into the PEALEAV PAND bucket, the number of comp hours must be calculated. Total WPE hours worked must be divided by two to calculate the PAND comp hours (36 hours pandemic on-site worked divided by two is 18 hours of comp time). The calculated PAND comp time hours are then entered in PEALEAV.
2. PEALEAVE Accrual through PHAHOURL (payroll).
 - a. Leave administrator manually provides to payroll the total WPE hours worked by employee.
 - b. Payroll manually keys total hours worked by employee in PHAHOURL with new earn code 428, *Pndm .50x Comp Earned*.
 - c. The system multiplies the total WPE hours worked by .50x to populate the PAND bucket in PEALEAV with the correct number of comp hours. (Employee works 36 hours, payroll enters 36 hours in PHAHOURL with code 428, PAND bucket populated with 18 hours of comp time).
 - d. The PEALEAV bucket is populated after PHPUPDT is run.

Earn code 428, *Pndm .50x Comp Earned*, is a non-cash code. It will display on the employee check with the calculated value of the comp time. The system will display the full hours worked x half the hourly rate to show the value of the comp time.

Code Structure

Regardless of whether your campus pays pandemic premium as pay or comp time, the full CAB setup must be completed. The only way to be able to generate future solutions and reports for different circumstances is to have a standardized setup across campuses.

Leave sheet

Type	Code	Description	Comment
Earn	WPE	Pandemic Mandatory Onsite Work	Collects hours on leave sheet. Hours are <u>not cross walked or adjusted</u> by SMART, MOVE or LAW business rules. All payments to employees or additions to leave accruals are handled manually in Banner.

Paying as Earned (no comp time)

Type	Code	Description	Comment
Earn	709	Pandemic Premium Pay .50	To payout Pandemic hours as worked, payroll enters earn code 709 in PHA HOUR with the total number of pandemic hours worked and the system will pay out at .50x.

Pandemic time worked as comp time

Type	Code	Description	Comment
Leave	PAND	Pandemic Comp .5x	If not using earn code 428 to accrue PAND comp time in PEALEAV, then HR must manually calculate comp time (hours worked divided by 2) and accrue the comp time hours in PAND bucket in PEALEAV
Earn	413	Comp Time Taken (.50 x)	Used to build the PAND cascade in LCAT and for use by payroll if needed.
Earn	428	Pndm .50x Comp Earned	Enter hours worked in PHA HOUR using this earn code and it will populate the PAND PEALEAV bucket with the correct Pandemic comp hours (hours worked divided by 2). Not used to pay out leave from the PAND bucket in PEALEAV. If accruing PAND hours as comp time, campus should use EITHER manual accrual in PEALEAV OR 428 earn code in PHA HOUR but NOT BOTH. Non-cash code

<i>Type</i>	<i>Code</i>	<i>Description</i>	<i>Comment</i>
Earn	813	Pandemic Comp Payout	To make a lump sum payout from the PAND bucket, enter the 813 earn code with the number of hours to pay in PHAHOUR. This code reduces the PAND bucket by the number of hours paid. This code is taxed at the supplemental rate.

Phased implementation

Additional configuration requirements will be released in the next week to support tracking and payout *Pandemic Mandatory Onsite Work*.

<i>Date</i>	<i>Change</i>
4/2/2020	Initial distribution to establish code for use on employee leave sheet. Directions on configuring PTREARN WPE, <i>Pandemic Mandatory Onsite Work</i> , and PTRECLS, Eligible Earnings WPE.
4/13/2020	Remaining Banner setup to manage Pandemic Additional Compensation.

PTREARN Create Earn Code WPE

PTREARN, enter new earn code WPE. The system will generate a warning message, “*WARNING* Earn Code not found, add assumed”, click GO to set up new earn code.

<i>PTREARN Field</i>	<i>Earn Code WPE Value</i>
Earnings Code Rules	
Long description	Pandemic Mandatory Onsite Work
Short description	PnOnSite
Source of rate	Job Regular Rate
Multiplication factor	50
Interface	
Allow labor distribution overrides at time entry	<leave blank>
Expend budget with earning value	<leave blank>
Applicable to fringe expense	<leave blank>
Rule class overrides	
Rule class	<leave blank>
Fringe rule class	<leave blank>
Attributes	
Type	(NONE)
Earnings group	MT Move Time Solution Earnings
Hours or units	Hours
Tax method	Annualized
Base salary	<leave blank>
Reduce base salary	<leave blank>
Longevity	<leave blank>
Shift differential	<leave blank>
Cash	<leave blank>
Stipend	<leave blank>
Display earnings history on web	✓ (check) the box
Display on web pay stub	✓ (check) the box
Leave	
Applicable to leave proration	<leave blank>
Applicable to leave minimum	<leave blank>
Leave taken code	ATND
Leave earned code	<leave blank>
FMLA eligible hours	<leave blank>
FLMA usage hours	<leave blank>

SAVE

- Regulatory information. No changes
- Labor distribution overrides. Coordinate with finance

Earnings Code: WPE		Start Over	
EARNINGS CODE RULES			
Long Description *	Pandemic Mandatory Onsite	Source of Rate	<input checked="" type="radio"/> Job Regular Rate <input type="radio"/> Special Rate <input type="radio"/> Table Rate
Short Description *	PnOnSite	Multiplication *	50
Interface		Factor	
<input type="checkbox"/> Allow Labor Distribution Overrides at Time Entry		<input type="checkbox"/> Applicable to Fringe Expense	
<input type="checkbox"/> Expend Budget with Earning Value			
Rule Class Overrides		Fringe Rule Class	
Rule Class		Fringe Rule Class	
Attributes			
Type		<input type="checkbox"/> Longevity	
Earnings Group	MT Move Time Solution Earnings	<input type="checkbox"/> Shift Differential	
Hours or Units	<input checked="" type="radio"/> Hours <input type="radio"/> Units	<input type="checkbox"/> Cash	
Indicator		<input type="checkbox"/> Stipend	
Tax Method *	Annualized	<input checked="" type="checkbox"/> Display Earnings History on Web	
<input type="checkbox"/> Base Salary		<input checked="" type="checkbox"/> Display on Web Pay Stub	
<input type="checkbox"/> Reduce Base Salary			
Leave			
<input type="checkbox"/> Applicable to Leave Proration		Leave Earned	
<input type="checkbox"/> Applicable to Leave Minimum		Code	
Leave Taken Code	ATND	<input type="checkbox"/> FMLA Eligible Hours	
		<input type="checkbox"/> FMLA Usage Hours	

PTREARN WPE

PTRLEAV Create Leave Code PAND

PTRLEAV insert row. Enter PAND as new leave code and enter descriptions as listed below.

<i>PTRLEAV Field</i>	<i>NEW Leave Code</i>
Leave code	PAND
Long description	Pandemic Comp .5x
Short description	PndmComp

SAVE

<i>Leave Code *</i>	<i>Long Description *</i>	<i>Short Description *</i>
PAND	Pandemic Comp .5x	PndmComp

PTRLEAV

PTREARN Create Earn Code 413

PTREARN, enter new earn code 413. The system will generate a warning message, “*WARNING* Earn Code not found, add assumed”, click GO to set up new earn code.

<i>PTREARN Field</i>	<i>Earn Code 413 Value</i>
Earnings Code Rules	
Long description	Comp Time Taken (.50 x)
Short description	CTHF
Source of rate	Job Regular Rate
Multiplication factor	100
Interface	
Allow labor distribution overrides at time entry	<leave blank>
Expend budget with earning value	<leave blank>
Applicable to fringe expense	<leave blank>
Rule class overrides	
Rule class	<leave blank>
Fringe rule class	<leave blank>
Attributes	
Type	<leave blank>
Earnings group	CO Comp Earned/Taken/OT
Hours or units	Hours
Tax method	Annualized
Base salary	
Reduce base salary	✓ (check) the box
Longevity	
Shift differential	
Cash	✓ (check) the box
Stipend	
Display earnings history on web	✓ (check) the box
Display on web pay stub	✓ (check) the box
Leave Proration	
Applicable to leave proration	
Applicable to leave minimum	
Leave taken code	PAND
Leave earned code	
FMLA eligible hours	
FLMA usage hours	

SAVE

- Regulatory information. No changes
- Labor distribution overrides. Coordinate with finance

ellucian Earnings Code Rules PTREARN 9.3.9 (GADEV3) Start Over

Earnings Code: 413

▼ EARNINGS CODE RULES Insert Delete Copy Filter

Long Description * Source of Rate Job Regular Rate Special Rate Table Rate

Short Description * Multiplication Factor *

Interface

Allow Labor Distribution Overrides at Time Entry Applicable to Fringe Expense

Expend Budget with Earning Value

Rule Class Overrides

Rule Class ... Fringe Rule Class ...

Attributes

Type ▼

Earnings Group ...

Hours or Units Hours Units

Indicator

Tax Method * ▼

Base Salary Longevity

Reduce Base Salary Shift Differential

Stipend Cash

Display Earnings History on Web

Display on Web Pay Stub

Leave

Applicable to Leave Proration Leave Earned Code ...

Applicable to Leave Minimum FMLA Eligible Hours

Leave Taken Code ... FMLA Usage Hours

PTREARN 413

PTREARN Create Earn Code 428

PTREARN, enter new earn code 428. The system will generate a warning message, “*WARNING* Earn Code not found, add assumed”, click GO to set up new earn code.

<i>PTREARN Field</i>	<i>Earn Code 428 Value</i>
Earnings Code Rules	
Long description	Pndm .50x Comp Earned
Short description	PndmComp
Source of rate	Job Regular Rate
Multiplication factor	50
Interface	
Allow labor distribution overrides at time entry	<leave blank>
Expend budget with earning value	<leave blank>
Applicable to fringe expense	<leave blank>
Rule class overrides	
Rule class	<leave blank>
Fringe rule class	<leave blank>
Attributes	
Type	(NONE)
Earnings group	CO Comp Earned/Taken/OT
Hours or units	Hours
Tax method	Annualized
Base salary	<leave blank>
Reduce base salary	<leave blank>
Longevity	<leave blank>
Shift differential	<leave blank>
Cash	<leave blank>
Stipend	<leave blank>
Display earnings history on web	✓ (check) the box
Display on web pay stub	✓ (check) the box
Leave	
Applicable to leave proration	✓ (check) the box
Applicable to leave minimum	✓ (check) the box
Leave taken code	<leave blank>
Leave earned code	PAND
FMLA eligible hours	<leave blank>
FLMA usage hours	<leave blank>

SAVE

- Regulatory information. No changes
- Labor distribution overrides. Coordinate with finance

ellucian Earnings Code Rules PTREARN 3.12 (GATEST2) ADD RETRIEVE RELATED TOOLS

Earnings Code: 428 Start Over

▼ EARNINGS CODE RULES Insert Delete Copy Filter

Long Description * Pndm_50x Comp Earned Source of Rate Job Regular Rate Special Rate Table Rate

Short Description * PndmComp Multiplication Factor * 50

Interface

Allow Labor Distribution Overrides at Time Entry Applicable to Fringe Expense

Expend Budget with Earning Value

Rule Class Overrides

Rule Class ... Fringe Rule Class ...

Attributes

Type (NONE)

Earnings Group CO ... Comp Earned/Taken/OT

Hours or Units Hours Units

Indicator

Tax Method * Annualized

Base Salary Longevity

Reduce Base Salary Shift Differential

Stipend Cash

Display Earnings History on Web

Display on Web Pay Stub

Leave

Applicable to Leave Proration Leave Earned Code PAND ...

Applicable to Leave Minimum FMLA Eligible Hours

Leave Taken Code ... FMLA Usage Hours

PTREARN 428

PTREARN Create Earn Code 709

PTREARN, enter new earn code 709. The system will generate a warning message, “*WARNING* Earn Code not found, add assumed”, click GO to set up new earn code.

<i>PTREARN Field</i>	<i>Earn Code 709 Value</i>
Earnings Code Rules	
Long description	Pandemic Premium Pay .50
Short description	PndmPrem
Source of rate	Job Regular Rate
Multiplication factor	50
Interface	
Allow labor distribution overrides at time entry	<leave blank>
Expend budget with earning value	<leave blank>
Applicable to fringe expense	<leave blank>
Rule class overrides	
Rule class	<leave blank>
Fringe rule class	<leave blank>
Attributes	
Type	(NONE)
Earnings group	PR Premium Earnings
Hours or units	Hours
Tax method	Annualized
Base salary	<leave blank>
Reduce base salary	<leave blank>
Longevity	<leave blank>
Shift differential	<leave blank>
Cash	✓ (check) the box
Stipend	<leave blank>
Display earnings history on web	✓ (check) the box
Display on web pay stub	✓ (check) the box
Leave	
Applicable to leave proration	<leave blank>
Applicable to leave minimum	<leave blank>
Leave taken code	<leave blank>
Leave earned code	<leave blank>
FMLA eligible hours	<leave blank>
FLMA usage hours	<leave blank>

SAVE

- Regulatory information. No changes
- Labor distribution overrides. Coordinate with finance

ellucian Earnings Code Rules PTREARN 1.3.9 (GADEV3)

Earnings Code: 709 Start Over

EARNINGS CODE RULES Insert Delete Copy Filter

Long Description * Source of Rate Job Regular Rate Special Rate Table Rate

Short Description * Multiplication Factor *

Interface

Allow Labor Distribution Overrides at Time Entry Applicable to Fringe Expense

Expend Budget with Earning Value

Rule Class Overrides

Rule Class ... Fringe Rule Class ...

Attributes

Type ...

Earnings Group ... Premium Earnings

Hours or Units Hours Units

Indicator

Tax Method * ...

Base Salary Longevity

Reduce Base Salary Shift Differential

Cash Stipend

Display Earnings History on Web

Display on Web Pay Stub

Leave

Applicable to Leave Proration Leave Earned Code ...

Applicable to Leave Minimum FMLA Eligible Hours

Leave Taken Code ... FMLA Usage Hours

PTREARN 709

PTREARN Create Earn Code 813

PTREARN, enter new earn code 813. The system will generate a warning message, “*WARNING* Earn Code not found, add assumed”, click GO to set up new earn code.

<i>PTREARN Field</i>	<i>Earn Code 813 Value</i>
Earnings Code Rules	
Long description	Pandemic Comp Payout
Short description	PndmComp
Source of rate	Job Regular Rate
Multiplication factor	100
Interface	
Allow labor distribution overrides at time entry	<leave blank>
Expend budget with earning value	<leave blank>
Applicable to fringe expense	<leave blank>
Rule class overrides	
Rule class	<leave blank>
Fringe rule class	<leave blank>
Attributes	
Type	(NONE)
Earnings group	PY Payouts
Hours or units	Hours
Tax method	Supplemental Rate
Base salary	<leave blank>
Reduce base salary	<leave blank>
Longevity	<leave blank>
Shift differential	<leave blank>
Cash	✓ (check) the box
Stipend	<leave blank>
Display earnings history on web	✓ (check) the box
Display on web pay stub	✓ (check) the box
Leave	
Applicable to leave proration	<leave blank>
Applicable to leave minimum	<leave blank>
Leave taken code	PAND
Leave earned code	<leave blank>
FMLA eligible hours	<leave blank>
FLMA usage hours	<leave blank>

SAVE

- Regulatory information. No changes
- Labor distribution overrides. Coordinate with finance

ellucian		Earnings Code Rules PTREARN: 3.12 (GATEST2)		ADD	RETRIEVE	RELATED	TOOLS	1
Earnings Code: 813								Start Over
EARNINGS CODE RULES Insert Delete Copy Filter								
Long Description *	Pandemic Comp Payout			Source of Rate	<input checked="" type="radio"/> Job Regular Rate <input type="radio"/> Special Rate <input type="radio"/> Table Rate			
Short Description *	PndmComp			Multiplication Factor *	100			
Interface								
<input type="checkbox"/> Allow Labor Distribution Overrides at Time Entry				<input type="checkbox"/> Applicable to Fringe Expense				
<input type="checkbox"/> Expend Budget with Earning Value								
Rule Class Overrides								
Rule Class <input type="text"/> ...				Fringe Rule Class <input type="text"/> ...				
Attributes								
Type	(NONE) ▾			<input type="checkbox"/> Longevity				
Earnings Group	PY ... Payouts			<input type="checkbox"/> Shift Differential				
Hours or Units	<input checked="" type="radio"/> Hours <input type="radio"/> Units			<input checked="" type="checkbox"/> Cash				
Indicator				<input type="checkbox"/> Stipend				
Tax Method *	Supplemental Rate ▾			<input checked="" type="checkbox"/> Display Earnings History on Web				
<input type="checkbox"/> Base Salary				<input checked="" type="checkbox"/> Display on Web Pay Stub				
<input type="checkbox"/> Reduce Base Salary								
Leave								
<input type="checkbox"/> Applicable to Leave Proration				Leave Earned Code <input type="text"/> ...				
<input type="checkbox"/> Applicable to Leave Minimum				<input type="checkbox"/> FMLA Eligible Hours				
Leave Taken Code	PAND ...			<input type="checkbox"/> FMLA Usage Hours				

PTREARN 813

PTRECLS Eligible Earnings 413, 428, 709, 813 and WPE

For employee classes; EHRA Non Faculty (EN), Law Enforcement (LE), SHRA Exempt (SE), and SHRA Non Exempt (SN) add earn codes 413, 428, 709, 813 and WPE to eligible earnings.

PTRECLS > Eligible Earnings

- PTRECLS, enter Eclass (EN, LE, SE and SN)
- Eligible Earnings > Insert
- Enter Earn Code **413**, *Comp Time Taken (.50x)*
- SAVE

- PTRECLS, enter Eclass (EN, LE, SE and SN)
- Eligible Earnings > Insert
- Enter Earn Code **428**, *Pndm.50x Comp Earned*
- SAVE

- PTRECLS, enter Eclass (EN, LE, SE and SN)
- Eligible Earnings > Insert
- Enter Earn Code **709**, *Pandemic Premium Pay .50*
- SAVE

- PTRECLS, enter Eclass (EN, LE, SE and SN)
- Eligible Earnings > Insert
- Enter Earn Code **813**, *Pandemic Comp Payout*
- SAVE

- PTRECLS, enter Eclass (EN, LE, SE and SN)
- Eligible Earnings > Insert
- Enter Earn Code **WPE**, *Pandemic Mandatory Onsite Work*
- Assign a Time Entry Sequence.
 - *Time Entry Sequence* number is campus discretion. This number controls the order on the PHA HOUR timesheets.
- Assign a Time Sheet Print Sequence.
 - *Time Sheet Print Sequence* number is based on campus discretion. When entered, this will show on employee leave sheet.
- ✓ (check) Approvers Indicator
- SAVE

Repeat so Earn Codes 413, 428, 709, 813 and WPE are included in e-classes; EHRA Non Faculty (EN), Law Enforcement (LE), SHRA Exempt (SE) and SHRA Non Exempt (SN) as Eligible Earnings.

PTRPCAT Add Earn Code 413 to Longevity Eligible earnings

Add Earn Codes 413 to Longevity Eligible Earnings

- PTRPCAT
- Premium Pay Category: Select 'LNGP', Longevity. GO
- Next block 2x to Eligible Earnings
- Eligible Earnings Code, insert **413**, Comp Time Taken (.50x)
- SAVE

The screenshot shows the PTRPCAT Premium Pay Category Rules interface for 'LNGP Longevity'. The 'ELIGIBLE EARNINGS' section is active, displaying a list of earnings codes. The 'Insert' button is highlighted with a red box, and the row for '413 Comp Time Taken (.50 x)' is also highlighted with a red box.

Sequence Number *	Pay Code *	Pay Code Description	Earnings Code *	Earnings Code Description
1	LNGP	Longevity	900	Longevity Premium

Service Years *	Service Months *	Percent *	Amount *
10		0	18.00
10		1	0.00
11		0	18.00
11		1	0.00

Earnings Code *	Earnings Code Description	Shift
413	Comp Time Taken (.50 x)	
414	CompTime Taken - Exempt	
415	Comp Time Taken 1.0x	
416	Comp Time Taken 1.5x	
417	On Call Comp Time Taken	
418	Emergency Event Hours Taken	

PTRLCAT Set up PAND

Step One: Set Up PAND Leave Categories

- PTRLCAT > Enter Leave Category: E2
- Enter Leave Code: PAND
- GO
- Accrue Frequency: Pay Period
- Base Date: Adjusted Service
- Allow negative balance: ✓ (check) the box
(Note: This box will be unchecked in the following step. The system requires it be checked here to move to the next screen)
- Cut-off Day: 16
- Roll MM/DD: 1/1
- Banking Frequency: One Time
- Accrue in Pays: 1st, 2nd, 3rd, 4th and 5th

SAVE

After the next two PTRLCAT screens are created for E2, PAND (Pandemic Comp .5x) will need to be setup in each of the remaining eligible categories; E3, E4, E5, E6, E7, S1, S3, S4, S5, S6 and S7.

A [checklist](#) is provided below to assist with tracking the setup.

The screenshot shows the 'Leave Category Rules PTRLCAT 9.3.3 (GADEV3)' window. At the top, it displays 'Leave Category: E2 EHRA16 12 month' and 'Leave Code: PAND Pandemic Comp .5x'. Below this, the 'LEAVE CATEGORY RULE' section is expanded to show 'General Leave Category' settings. In this section, 'Accrue Frequency' is set to 'Pay Period', 'Base Date' is 'Adjusted Service', 'Cut-Off Day' is '16', and 'Roll MMDD' is '1 / 1'. The 'Allow Negative Balance' checkbox is checked, and a yellow callout box with a red arrow points to it, containing the text: 'This box will be unchecked after the second screen is completed.' Below the general settings is the 'Banking Rules' section, where 'Bank Frequency' is set to 'One Time' (selected with a radio button) and 'Available Days' is '0'. The 'Accrual Method' section at the bottom shows 'Accrue in Pays' with checkboxes for '1st', '2nd', '3rd', and '4th', all of which are checked.

PTRLCAT Table PTRLVAS

Step Two: Accrue PAND

PTRLCAT > Tools > Leave Accrual Schedule (or NEXT SECTION)

- Service Years 0
- Service Months 0
- Accrual Hours 0
- Maximum Limit of Current Balance 999
- Maximum Roll Hours 999

SAVE

Go back to previous section (first screen) and uncheck the “Allow Negative Balance” block. Without saving, continue to the third setup screen.

Service Years *	Service Months *	Accrual Hours *	Maximum Limit of Current Balance *	Maximum Roll Hours *
0	0	0.00	999.00	999.00

PTRLCAT

Table PTRLVAC

Step Three: Assign PAND Leave Code Priorities

- Next section (Alt + Page Down)
- INSERT the Sequence Number and other information from the appropriate chart below. The Leave Code Priorities are *different* for SHRA LCATS than for EHRA LCATS

SAVE

After the E2 PTRLCAT setup is completed for PAND, it will need to be repeated for each of the remaining leave-earning categories; E3, E4, E5, E6, E7, S1, S3, S4, S5, S6 and S7. A [checklist](#) is provided below to assist with tracking the setup.

EHRA Leave Code Priorities, PAND

PAND Leave Code Priorities for **EHRA** Leave Categories ; E2, E3, E4, E5, E6 and E7

Sequence Number	EHRA PAND Cascade
1	VACA
2	SPLV
3	SPL2
4	BONU
5	DOCK

Earnings Code	Earn Code Description
200	Vacation Leave
256	Special Leave
257	Special Annl Leave Bonus 2
250	Bonus Leave
500	Dock Pay

SHRA Leave Code Priorities, PAND

PAND Leave Code Priorities for **SHRA** Leave Categories; S1, S3, S4, S5, S6 and S7

Sequence Number	SHRA PAND Cascade
1	OCCT
2	CTOT
3	CTGP
4	CTEX
5	CTUC
6*	INCT
7	VACA
8	SPLV
9	SPL2
10	BONU
11	DOCK

Earnings Code	Earn Code Description
417	On Call Comp Time Taken
416	Comp Time Taken 1.5x
415	Comp Time Taken 1.0x
414	Comp Time Taken – Exempt
418	Emergency Event Hours Taken
252	Incentive Leave
200	Vacation
256	Special Leave Taken
257	Special Annl Leave 2 Taken
250	Bonus Leave
500	Dock Pay

* If your campus has not implemented Incentive Leave, leave it off the hierarchy and adjust the subsequent sequence numbers.

PTRLCAT PAND LCAT Checklist

PAND Leave Category	PTRLCAT
E2 - EHRA 16.00 12 month	<input type="checkbox"/>
E3 - EHRA 16 10 month Aug-May	<input type="checkbox"/>
E4 - EHRA 16 11 month Aug-June	<input type="checkbox"/>
E5 – EHRA 16 11 month July-May	<input type="checkbox"/>
E6 – EHRA 16 9 month Aug-April	<input type="checkbox"/>
E7 – EHRA 16 9 month Sept-May	<input type="checkbox"/>
S1 - SHRA 12 month	<input type="checkbox"/>
S3 – SHRA 10 month Aug-May	<input type="checkbox"/>
S4 – SHRA 11 month Aug-June	<input type="checkbox"/>
S5 – SHRA 11 month July-May	<input type="checkbox"/>
S6 – SHRA 9 month Aug-April	<input type="checkbox"/>
S7 – SHRA 9 month Sept-May	<input type="checkbox"/>

Sequence Number *	Next Leave Code *	Next Leave Description	Earnings Code *	Earnings Description
1	VACA	Vacation	200	Vacation
2	SPLV	Special Leave	256	Special Leave Taken
3	SPL2	Special Annl Leave Bonus 2	257	Special Leave 2 Taken
4	BONU	Bonus Leave	250	Bonus Leave
5	DOCK	Dock Leave Overage	500	Dock Pay

PTRLCAT PAND PTRLVPR Table

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

PTRLCAT PAND PTRLVPR Table

PTRLCAT Modify ZCVC Leave Code Priorities

- PTRLCAT > Enter Leave Category: E2
- Enter Leave Code: ZCVC
- GO
- Tools > Leave Code Priorities
- Delete appropriate sequence records in order to rebuild and insert PAND
 - E2, E3, E4, E5, E6, E7 delete all current records and rebuild the [ZCVC EHRA](#) Leave Code Priorities as below.
 - S1, S3, S4, S5, S6 and S7. Delete rows #4, CTEX, and below. Rebuild the Leave Code Priorities Insert new PAND as new #4 and continue rebuilding [ZCVC SHRA](#) as below.
- INSERT the Sequence Number and other information from the appropriate chart below. The Leave Code Priorities are *different* for [SHRA LCATS](#) than for [EHRA LCATS](#)

SAVE

After the E2 PTRLCAT setup is completed for PLBD, it will need to be repeated for each of the remaining leave-earning categories; E2, E3, E4, E5, E6, E7, S1, S3, S4, S5, S6 and S7. A [checklist](#) is provided below to assist with tracking the setup.

EHRA Leave Code Priorities, ZCVC

ZCVC Leave Code Priorities for **EHRA** Leave Categories - E2, E3, E4, E5, E6 and E7

Sequence Number	EHRA ZCVC Cascade
1	PAND
2	VACA
3	SPLV
4	SPL2
5	BONU
6	DOCK

Earnings Code	Earn Code Description
413	Comp Time Taken (.50x)
200	Vacation
256	Special Leave Taken
257	Special Leave 2 Taken
250	Bonus Leave
500	Dock Pay

SHRA Leave Code Priorities, Modify ZCVC

Delete rows #4, CTEX, and below. Rebuild the Leave Code Priorities Insert new PAND as new #4 and continue rebuilding ZCVC as below.

ZCVC Leave Code Priorities for **SHRA** Leave Categories; S1, S3, S4, S5, S6 and S7

Sequence Number	SHRA ZCVC Cascade
1	OCCT
2	CTOT
3	CTGP
4	PAND
5	CTEX
6	CTUC
7*	INCT
8	VACA
9	SPL2
10	SPLV
11	BONU
12	DOCK

Earnings Code	Earn Code Description
417	On Call Comp Time Taken
416	Comp Time Taken 1.5x
415	Comp Time Taken 1.0x
413	Comp Time Taken (.50x)
414	Comp Time Taken – Exempt
418	Emergency Event Hours Taken
252	Incentive Leave
200	Vacation Leave
257	Special Annl Leave 2 Taken
256	Special Leave Taken
250	Bonus Leave
500	Dock Pay

* If your campus has not implemented Incentive Leave, leave it off the hierarchy and adjust the subsequent sequence numbers.

PTRLCAT ZCVC Leave Code Priorities Checklist

ZCVC Leave Category	PTRLCAT Leave Code Priority
E2 - EHRA 16.00 12 month	<input type="checkbox"/>
E3 - EHRA 16 10 month Aug-May	<input type="checkbox"/>
E4 - EHRA 16 11 month Aug-June	<input type="checkbox"/>
E5 – EHRA 16 11 month July-May	<input type="checkbox"/>
E6 – EHRA 16 9 month Aug-April	<input type="checkbox"/>
E7 – EHRA 16 9 month Sept-May	<input type="checkbox"/>
S1 - SHRA 12 month	<input type="checkbox"/>
S3 – SHRA 10 month Aug-May	<input type="checkbox"/>
S4 – SHRA 11 month Aug-June	<input type="checkbox"/>
S5 – SHRA 11 month July-May	<input type="checkbox"/>
S6 – SHRA 9 month Aug-April	<input type="checkbox"/>
S7 – SHRA 9 month Sept-May	<input type="checkbox"/>

Sequence Number *	Next Leave Code *	Next Leave Description	Earnings Code *	Earnings Description
1	PAND	Pandemic Comp .5x	413	Comp Time Taken (.50 x)
2	VACA	Vacation	200	Vacation
3	SPLV	Special Leave	256	Special Leave Taken
4	SPL2	Special Annl Leave Bonus 2	257	Special Leave 2 Taken
5	BONU	Bonus Leave	250	Bonus Leave
6	DOCK	Dock Leave Overage	500	Dock Pay

PTSLCAT ZCVC

Table PTRLVPR

Leave Category Rules PTRLCAT 9.3.3 (GASTMO)				
Leave Category: S1 SHRA 12 month		Leave Code: ZCVC Cascading Vacation Leave		Leave Report Indicator: Leave Day or Hour Indicator: Hour
LEAVE CODE PRIORITIES				
Sequence Number *	Next Leave Code *	Next Leave Description	Earnings Code *	Earnings Description
1	OCCT	On Call Comp Time	417	On Call Comp Time Taken
2	CTOT	Comp 1.5x	416	Comp Time Taken 1.5x
3	CTGP	Comp 1x	415	Comp Time Taken 1.0x
4	PAND	Pandemic Comp .5x	413	Comp Time Taken (.50 x)
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	VACA	Vacation	200	Vacation
9	SPL2	Special Annl Leave Bonus 2	257	Special Leave 2 Taken
10	SPLV	Special Leave	256	Special Leave Taken
11	BONU	Bonus Leave	250	Bonus Leave
12	DOCK	Dock Leave Overage	500	Dock Pay

PTRLCAT ZCVC

Table PTRLVPR

PTRBDXE Excluded Earnings Load File 428

The new earn code 428 must be set up as an excluded earning for relevant PTRBDCA (benefit/deduction) codes. The below instructions set up new Earn Code 428, *Pndm .50x Comp Earned*, as excluded earnings via a load file to the PTRBDXE table.

PTRBDXE Instructions for IT

Test the load file process in a non-production database before updating the production database.

- Download existing PTRBDXE data for your back up. Note how many records are in the current table.

- Use the provided load file to insert information in Banner. This will add the new earn code as an excluded earning to the PTRBDXE table.
 1. Import Table Data
 2. Select Destination
 - a. Schema - Payroll
 - b. Object Name - PTRBDXE
 3. Select Source
 4. Specify Source Data Details
 5. Preview File and Define Fields
 6. Verify Mappings and Specify Primary Key. Primary keys are:
 - a. PTRBDXE_CODE
 - b. PTRBDXE_EARN_CODE
 7. Preview Results
 8. Specify Import Mode. **INSERT** See screenshot below. **Don't Commit**
 9. Repeat steps to **INSERT** and **Commit**

Specify Import Mode

Output

Apply changes to database object

Use Array DML Array Size: 500

Create file with SQL statements

Before Import

Truncate table Disable constraints

Delete all rows from table Disable triggers

Import Mode

Insert: Add records to destination table from source file.

Update: Update destination table records with source file records.

Merge: If destination table record exists, update it. Otherwise add.

Delete: Delete destination table records that match source file records.

Update, merge, and delete require a key to be specified and "Truncate/Delete table" unchecked.

Commit Mode: Don't commit

After Import (these will force a commit)

This should add **156 records** to PTRBDXE.

To verify the load file has updated these records, download the updated PTRBDXE table and verify the table contains the expected number of records.

PTRBDXE	Record Count
(A) Current number of records	
(B) Load file	156
(C) Expected # records AFTER load (A) + (B)	
(D) Actual # of records AFTER load	
(E) Variance (should be ZERO)	(C)-(D)

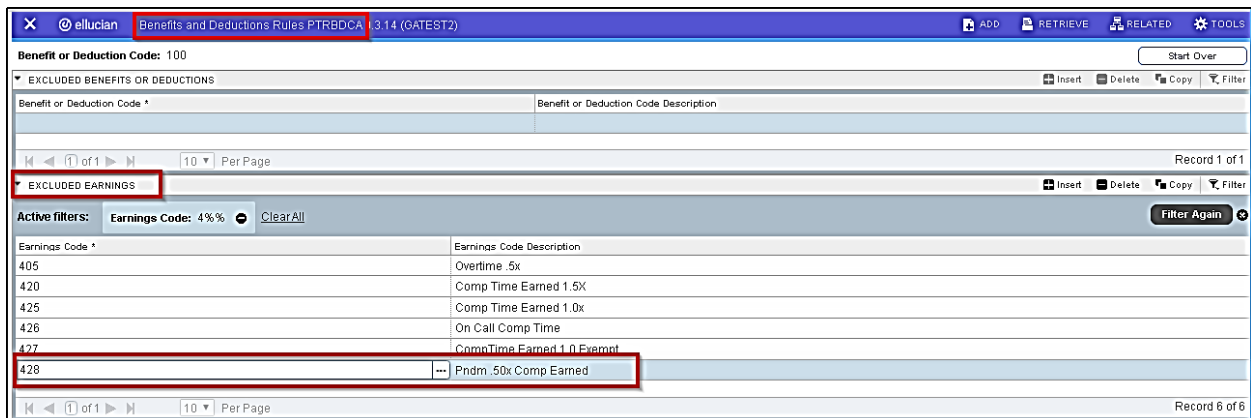
Verify the file updated records accurately by viewing the information in Banner, PTRBDCA.

Spot check Banner to confirm the changes display in the system.

- PTRBDCA
- Enter a sample Benefit or Deduction Code (example 100, 101 or 220)
- GO
- Tools > Excluded Deductions and Earnings

PTRBDCA Excluded Earnings AFTER UPDATE

Earn Code 428, Pndm .50x Comp Earned, should display



PTRBDCA > Excluded Earnings PTRBDXE table

Complete changes by **May 8, 2020**

The configuration changes need to be completed for use with the May MN payroll.

Notify aebrown@northcarolina.edu and your SSC Payroll Analyst when completed.

Table Updates

The below tables and fields were updated with this setup.

<i>Table</i>	<i>Field</i>	<i>Report Key Field</i>
PTRLEAV	PTRLEAV_CODE	PAND
PTRLEAV	PTRLEAV_SHORT_DESC	PAND
PTRLEAV	PTRLEAV_LONG_DESC	PAND
PTRLEAV	PTRLEAV_ACTIVITY_DATE	PAND
PTREARN	PTREARN_CODE	413, 428, 709, 813, WPE
PTREARN	PTREARN_LONG_DESC	413, 428, 709, 813, WPE
PTREARN	PTREARN_SHORT_DESC	413, 428, 709, 813, WPE E
PTREARN	PTREARN_RATE_IND	413, 428, 709, 813, WPE
PTREARN	PTREARN_MULT_FACTOR	413, 428, 709, 813, WPE
PTREARN	PTREARN_TYPE_IND	413, 428, 709, 813, WPE
PTREARN	PTREARN_ERGR_CODE	413, 428, 709, 813, WPE
PTREARN	PTREARN_UNIT_IND	413, 428, 709, 813, WPE
PTREARN	PTREARN_TAX_METHOD_IND	413, 428, 709, 813, WPE
PTREARN	PTREARN_BASE_SAL_IND	413, 428, 709, 813, WPE
PTREARN	PTREARN_EXCEPTION_IND	413, 428, 709, 813, WPE
PTREARN	PTREARN_CASH_IND	413, 428, 709, 813, WPE
PTREARN	PTREARN_WEB_DISP_IND	413, 428, 709, 813, WPE
PTREARN	PTREARN_DISP_WEB_PAYSTUB_IND	413, 428, 709, 813, WPE
PTREARN	PTREARN_LEAV_CODE_TAKEN	413, 428, 709, 813, WPE
PTREARN	PTREARN_LEAV_PRORATION_IND	413, 428, 709, 813, WPE
PTREARN	PTREARN_LEAV_MINIMUM_IND	413, 428, 709, 813, WPE
PTREARN	PTREARN_LEAV_CODE_TAKEN	413, 428, 709, 813, WPE
PTREARN	PTREARN_ACTIVITY_DATE	413, 428, 709, 813, WPE
PTREERN	PTREERN_EARN_CODE	413, 428, 709, 813, WPE
PTREERN	PTREERN_REDUCE_REG_PAY_IND	413, 428, 709, 813, WPE
PTREERN	PTREERN_TS_ENTRY_SEQ	413, 428, 709, 813, WPE
PTREERN	PTREERN_TS_PRINT_SEQ	413, 428, 709, 813, WPE
PTREERN	PTREERN_ATND_IND	413, 428, 709, 813, WPE
PTREERN	PTREERN_REDUCE_REG_PAY_IND	413, 428, 709, 813, WPE
PTREERN	PTREERN_EA_APPROVERS_IND	413, 428, 709, 813, WPE
PTREERN	PTREERN_ACTIVITY_DATE	413, 428, 709, 813, WPE
PTRPERN	PTRPERN_EARN_CODE	413, 428, 709, 813, WPE

<i>Table</i>	<i>Field</i>	<i>Report Key Field</i>
PTRLVAS	PTRLVAS_LCAT_CODE	413, 428, 709, 813, WPE
PTRLVAS	PTRLVAS_LEAV_CODE	413, 428, 709, 813, WPE
PTRLVAS	PTRLVAS_FREQ_IND	413, 428, 709, 813, WPE
PTRLVAS	PTRLVAS_BASE_DATE	413, 428, 709, 813, WPE
PTRLVAS	PTRLVAS_ANN_DAY	413, 428, 709, 813, WPE
PTRLVAS	PTRLVAS_ROLL_MONTH	413, 428, 709, 813, WPE
PTRLVAS	PTRLVAS_ROLL_DAY	413, 428, 709, 813, WPE
PTRLVAS	PTRLVAS_BANK_IND	413, 428, 709, 813, WPE
PTRLVAS	PTRLVAS_WEEK1_IND	413, 428, 709, 813, WPE
PTRLVAS	PTRLVAS_WEEK2_IND	413, 428, 709, 813, WPE
PTRLVAS	PTRLVAS_WEEK3_IND	413, 428, 709, 813, WPE
PTRLVAS	PTRLVAS_WEEK4_IND	413, 428, 709, 813, WPE
PTRLVAS	PTRLVAS_WEEK5_IND	413, 428, 709, 813, WPE
PTRLVAS	PTRLVAS_ACTIVITY_DATE	413, 428, 709, 813, WPE
PTRLVAC	PTRLVAC_LCAT_CODE	413, 428, 709, 813, WPE
PTRLVAC	PTRLVAC_LEAV_CODE	413, 428, 709, 813, WPE
PTRLVAC	PTRLVAC_YEAR	413, 428, 709, 813, WPE
PTRLVAC	PTRLVAC_MONTH	413, 428, 709, 813, WPE
PTRLVAC	PTRLVAC_ACCRUAL_HRS	413, 428, 709, 813, WPE
PTRLVAC	PTRLVAC_MAX_LIMIT_HRS	413, 428, 709, 813, WPE
PTRLVAC	PTRLVAC_ROLL_MAX_HRS	413, 428, 709, 813, WPE
PTRLVAC	PTRLVAC_ACTIVITY_DATE	413, 428, 709, 813, WPE
PTRLVPR	PTRLVPR_LCAT_CODE	413, 428, 709, 813, WPE
PTRLVPR	PTRLVPR_LEAV_CODE	413, 428, 709, 813, WPE
PTRLVPR	PTRLVPR_SEQ_NO	413, 428, 709, 813, WPE
PTRLVPR	PTRLVPR_LEAV_CODE_NEXT	413, 428, 709, 813, WPE
PTRLVPR	PTRLVPR_EARN_CODE	413, 428, 709, 813, WPE
PTRLVPR	PTRLVPR_ACTIVITY_DATE	413, 428, 709, 813, WPE