**E-PAR Guidelines for**

**Time Advisors**

Agency Time Advisors should review electronic Personnel Action Requests (E-PARs) before submission to the HR Service Center (HRSC). After an HRSC Representative enters the transaction, the Time Advisor must ensure all steps are complete. Use the checklist below to ensure proper handling. Coordination between the gaining and losing agencies is important to ensure the accuracy of all time data.

For concerns/questions regarding E-PARs and related transactions, contact the HRSC. Policy questions should be directed to ra-oaleave@pa.gov.

**Separations**

**Before Submission of E-PAR:**

**[ ]** Determine separation reason

* Retirement separation - only if agency received SERS notification from HRSC
* Reciprocal Leave Agreement (manual leave payout reason code 90)
* Furlough
* Death
	+ Deceased prior to shift- enter full-day AO absence
	+ Deceased while working, not work related - pay regular time for remainder of shift
	+ Deceased during or after shift - prior absence remains

**[ ]**  Delete/delimit future-dated entries, except long-term, unpaid absences

* Absences (IT2001)
* ZIPY entries for applicable DOT users
* Attendances (IT2002)
* Substitutions (IT2003)
* Recurring/Additional Payments (IT0014/IT0015)
	+ Deceased – delimit last day of pay period employee was paid, not pay period in which date of death occurred
	+ Recurring Military Stipend - Contact HRSC Military Team to delimit or to enter a one-time payment for the partial month using the last day of work as the effective date

**Upon Notification Transaction is Complete and Prior to Unlocking the Q-record:**

**[ ]** Are all … entered and approved?

* Absences
* Attendances (recoded)
* Substitutions

**[ ]** Are all errors resolved for effective dates after the “Earl.pers.rec.date” on IT0003?

* Time Transfer Error Report
* Time Evaluation Messages Display Report
* HR Error Reporting – Personnel Area
* HR/Pay Help Desk ticket (HDT)

 **[ ]** Manual quota payouts (or recoupments)

* Accrued Holiday (effective date must be prior to separation date)
	+ In accordance with bargaining unit
	+ No payout for exempt management and non-represented
* Due to a Reciprocal Leave Agreement
	+ Provide transferred quotas to gaining

 agency

* + If no payout, reduce actual and anticipated quotas to zero
	+ Pay out positive holiday & compensatory quotas, and in some cases, personal\* quota
	+ Holiday & comp are not paid out for exempt management/non-represented
* Statutory salary employee; frozen from prior position (IT0001)
	+ Work with BCPO and OA, Bureau of Employee Benefits (ra-oaleave@pa.gov)

**[ ]** If due to death, contact BCPO to lock record

**[ ]** Unlock QRET, QSEP, etc. (IT2012)

* On or before last day of pay processing
* Notify or respond to email received from HRSC via email to ra-HRSC@pa.gov

**[ ]** Is separation due to furlough?

* See [*Time Alert 2011-07: Furlough Related Systems Processes (Revised)*](http://www.hrm.oa.pa.gov/_layouts/download.aspx?SourceUrl=http://www.hrm.oa.pa.gov/Alerts-and-Transactions/Documents/Time%20Alerts/TIME%20ALERT%202011-07%20Furlough%20Related%20Systems%20Processes%20Revised.doc)
* Determine if annual/combined quota should be paid or frozen
* Payout personal\* quota

**After Payroll has Processed:**

**[ ]** Review Remuneration Statement

* Did annual/combined payout correctly?
* Did personal\* payout correctly?
* Did compensatory payout correctly?
* Did holiday payout correctly?
* Did sick payout correctly?
* Did stipend payout correctly?

 *\*Only if applicable. Most employees no longer earn personal leave.*

**New hire/Rehire/New Duty Assignment/Transfer**

The gaining agency is responsible for submitting the E-PAR. Coordination between the losing and gaining agency is important. If the action is not an agency transfer, coordination between organizations may need to occur, with time advisor’s oversight. **Note:** “Bypass work schedule” may be requested on the E-PAR for transfers within the same agency, working the same bi-weekly hours. For all others, future-dated absences will be deleted.

**Gaining Agency - Before Submission of E-PAR:**

**[ ]** Is the information correct on the E-PAR?

* Time Administrator code, if unknown use “TMK”
* Work schedule rule - if unknown use “default”

**[ ]** Are there any system errors?

* Time Transfer Error Report
* Time Evaluation Messages Display Report
* HR Error Reporting – Personnel Area
* HR/Pay Help Desk ticket (HDT)

**[ ]** If on Military LWOP, contact HRSC Military Team to confirm. Add comment on E-PAR if not returning on effective date to denote salary increase

**[ ]** Add comment for future-dated absences

* Are there any future-dated holidays?
	+ Consider daily hours changes
	+ Consider to/from AWS
	+ Consider 24/7 vs. 5 days/week schedules
* Are there any paid, future-dated absences?
	+ Consider start/end dates for partial day absences
	+ Consider daily work hour changes
	+ Discuss vacation absences with new supervisor. If approved, note on E-PAR that they should not be deleted.
* Are there any FMLA absences?
	+ Do not delete FMLA absences
	+ Review with FMLA Specialist

**[ ]** Add comment for future-dated substitutions

* Same agency, same AWS or unique schedule

**Losing Agency – Upon Notification of Transfer/New Duty Assignment:**

**[ ]** Are all… entered and approved?

* Absences (IT2001)
* Attendances (IT2002)
* Substitutions (IT2003)

**[ ]** Are there any system errors?

* Time Transfer Error Report
* Time Evaluation Messages Display Report
* HR Error Reporting – Personnel Area
* HR/Pay Help Desk ticket (HDT)

**[ ]** Attendances

 Delete future-dated attendances

  Work with HRSC if retro action, since overtime may need to be adjusted

**[ ]** Substitutions

 Delete all, unless an unusual schedule is continuing

[ ]  Recurring Military Stipend - do nothing

**[ ]** Quota payouts, recoupments, or adjustments

* Reciprocal Leave Agreement applies

Personal\* - transfers from a bargaining unit that earns personal to one that does not: remove earned/unused personal and add to actual/anticipated annual/combined quotas; change “deduction to” date of personal quotas

* to reflect the last day in the BU that earned personal; payout for non-leave earning
* Compensatory & Holiday (if changing org)
	+ No payout for exempt management and non-represented

 *\*Only if applicable. Most employees no longer earn personal leave.*

**Upon Notification that Transaction is Complete, Gaining Agency:**

**[ ]** Review infotypes to ensure correct information entered from E-PAR

* Time Administrator code (IT0001)
* Work schedule rule (IT0007)
* Absences and holidays delimited/kept as appropriate
* Absences re-saved with new start/end time for partial days

**[ ]**  Leave appointment date (IT0041, Z2)

**[ ]** Leave service credit

* Obtain information from employee during orientation
* Research prior history

**[ ]** Quota entitlements generated and correct

* Annual/Combined and Sick quotas
	+ Transfer from leave accruing to non-leave accruing or vice versa – quota impacts (See [*Time Alert 2014-12*](http://www.hrm.oa.pa.gov/_layouts/download.aspx?SourceUrl=http://www.hrm.oa.pa.gov/Alerts-and-Transactions/Documents/Time%20Alerts/TIME%20ALERT%202014-12%20-%20Transfer%20from%20Leave%20Accruing%20to%20Non%20Leave%20Accruing.doc))
	+ Transfer from perm to non-perm – end date quotas. Enter quota corrections (See [*Time Alert 2017-26*](http://www.hrm.oa.pa.gov/_layouts/download.aspx?SourceUrl=http://www.hrm.oa.pa.gov/Alerts-and-Transactions/Documents/Time%20Alerts/TIME_ALERT_2017_26_Perm_to_Non-Perm_Employment_Changes.docx))
* Holiday Quota correct for remaining year
* Personal\* quotas
* Reciprocal leave agreements - quota obtained from losing agency and entered

**[ ]** Leave without Pay

 Returning same day as new duty - enter return from LWOP Action same day as new duty assignment

* Not returning same day as new duty - do not enter return from LWOP Action

**Upon Notification that Transaction is Complete, Gaining Agency *(continued)*:**

**[ ]** Frozen quota reinstated

* Sick quota - separation less than one year
* Annual/combined - frozen from furlough

**[ ]** Leave Files

 Obtain files from losing agency

**[ ]** Seniority

 If prior position covered by Temporary Clerical Pool Agreement (Subarea AA71 or AN71) and employee transferred to permanent AFSCME position, adjust seniority to add TCP hours (See Business Process Procedures (BPP), [*Maintain Seniority Data, PA30, IT0552*](http://www.hrm.oa.pa.gov/Alerts-and-Transactions/Pages/time-bpp.aspx)).