**E-PAR Guidelines for**

**Time Advisors**

The agency Time Advisor should review electronic Personnel Action Requests (E-PAR) prior to submitting them to the HRSC for entry. After the transaction has been entered by the HR Service Center (HRSC) Representative, the Time Advisor should ensure that all time steps are complete. The below checklist will help to ensure all time aspects are coordinated. Coordination between the gaining and losing agencies will also help to ensure accuracy of all time data.

Concerns regarding the E-PAR or transaction processed should be reviewed with the HRSC. Concerns regarding policy should be directed to the ra-oaleave@pa.gov resource account.

**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 shift, prior absence remains
	+ Deceased after shift, prior absence remains

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

* Absences (IT2001)
* 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: Delimit using last day of next to last pay period in previous month or Enter a one-time payment for the partial month using the last day of work as the effective date
* ZIPY entries for agencies using this transaction

**Upon Notification Transaction is Complete:**

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

* Absences
* Attendances
* Substitutions

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

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

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

* Accrued Holiday
	+ In accordance with covered bargaining unit
	+ No payout for exempt management and non-represented
* Reciprocal Leave Agreement
* Statutory salary employee; frozen from prior position (IT0001)
	+ Work with BCPO and OA, Salary Administration

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

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

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

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

* Reference **Time Alert 2010-01: Furlough Related Systems Processes**
* Determine if annual/combined is to 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?

**[ ]** If due to a Reciprocal Leave Agreement/Manual Leave Payment

* Provide transferred quotas to gaining agency
* Reduce actual quotas to equal zero
* Reduce anticipated quotas to equal zero

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

The gaining agency is responsible for submitting the E-PAR, but coordination between agencies is important. If the action is not for an agency transfer, coordination between organizations may need to occur, with the agency time advisor’s oversight. **Note:** If transferring within the same agency and working the same bi-weekly hours, a request to “bypass work schedule” may be requested on the E-PAR; all others will be saved and 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”

**[ ]** Add comment on E-PAR if on MLWOP and 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 day a week schedules
* Are there any paid future dated absences?
	+ Consider start/end dates for partial day absences
	+ Consider daily hours changes
	+ Discuss vacation absences with new supervisor
* Are there any SPF absences?
	+ Do not delete SPF absences

**[ ]** 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 Evaluation Messages Display Report
* HR Error Reporting – Personnel Area
* Central Services Transaction (CST) ticket
* HR/Pay Help Desk ticket (HDT)

**[ ]**  Quotas (for transfers to/from H1 bargaining unit only)

  To H1 BU, delimit personal quota

  From H1 BU, delimit Bereavement quota

**[ ]** Attendances

 Delete future 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 (adjustment for H1; payout for non-leave earning)
* Compensatory & Holiday (if changing organization)

**Upon Notification 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 (if needed for new hire/ rehire)

* Obtain information from employee during orientation
* Research prior history

**[ ]** Quota entitlements generated and correct

* Annual/Combined and Sick quotas
	+ Transfer from non-perm to perm verify need for ZN2P record on IT2012 (Reference Time Alert – 2012-21)
* Holiday Quota correct for remaining year
* Personal quotas (except H1 bargaining unit)
* Bereavement quota (H1 bargaining unit only)
* Reciprocal leave agreements, quota obtained 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

**[ ]** Frozen quota reinstated

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

**[ ]** Leave Files

 Obtain military and SPF Files from losing agency

**[ ]** Seniority

 If prior position was covered by the Temporary Clerical Pool Agreement (subarea AA71 or AN71) and employee transferred to permanent position covered by AFSCME, adjust seniority to add TCP hours (reference PA Alert 2004-23).