PTO Parental – Run Balance Carryover Process						
Purpose:	 When a PTO Parental element is entered with an effective date for a prior calendar year, the PTO Parental Balance Carryover Process is run to carry forward the balance across calendar years. This process should not be run when: The PTO Parental element is entered with an effective date in the current calendar year. The assignment category has changed between exempt and nonexempt since the PTO Parental element was added; those balances will need to be adjusted manually. 					
Frequency:	This process is only run once, if needed.					
Background/	Employee must be eligible to accrue PTO Parental.					
Prerequisites:	Employee must have the PTO Parental element added to their assignment.					
Reference	Leave Administration Handbook					
Materials:	Paid Time Off Plan Series I					
	Paid Time Off Plan Series II					
	Enter PTO Parental Accrual Element					

Action:		Step(s):		
1.	Navigate to the	a. Sign into the Oracle Business Applications.			
	Submit Request	b. Na	Navigate to Processes and Reports as outlined in the <u>Run a Report</u> Process		
	Screen in Oracle	He	Help.		
2.	Select RF PTO	a. On	n the Run this Request Screen, enter RF PTO Parental Balance Carryover in		
	Parental Balance	the	the name field.		
	Carryover	Run this Request Name RF PTO Parental Balance Carryover			
		b. Sel	b. Select Enter on your keyboard which will allow you to enter the parameters for		
		the process.			
3.	Run for Draft	<i>Note</i> : It is recommended to run the PTO Parental Balance Carryover in Draft first,			
	Output	to review how the balances will populate.			
	(Optional)	a. Run the PTO Parental Balance Carryover in Draft using the following			
		pai	ameters:		
			Parameter	Value	
			Run Mode	D (Draft)	
			Current Date*	Today's Date	
			Assignment Number	Employee Identification Number	
			Plan Start Date	PTO Plan Start Date	
		*Note: This value auto-populates and should not be changed.			

	Parameters Development in the interview of the intervi					
	Run Mode D Draft					
	Current Date 10-JAN-2025					
	Assignment Number 117375					
	Plan Start Date 01-JAN-2024 PTO Parental EX					
	Select Submit.					
	Submit					
	The output will show a Warning status when completed.					
	Name Phase Status RE PTO Parental Balancian Completed Warning					
	d. Select View Log.					
	View Log (K)					
	e. The output is in a .txt file for review.					
4. Review Draft	a. The Draft report will provide various information regarding the employee's					
Output (Ontional)	assignment and break down the accrual amounts which will be carried over from the prior year(s). It is recommended to review:					
(Optional)	 Each calendar year beginning with the Plan Start Date through the current 					
	year is populated on the report.					
	• The Accrual Amount for each year is accurate.					
	• The Amount to Carryover at the yearend is correct.					
	on FTE, including any changes to the FTE during the period.					
	Output Example:					
	Accrual Plan: PTO Parental EX					
	Element: PTO Parental EX Category: R					
	Effective Start: 01-JAN-2024 Effective End: 31-DEC-4712					
	Months Worked: 16.5323					
	Calculation Date: 31-DEC-2025					
	+- Current Carryover Adjustments+ +-					
	Accrual Amount: 30.0 Net Entitlement: 60.0					
	Carryover Ceiling: 60.0					
	Amount to Carryover: 60.0					
	++					
	+- Element Entry Creation+ ++					

5.	Run the PTO	a.	. Once the amounts have been verified, follow steps 1 & 2 outlined above to		
	Parental Balance		navigate to the PTO Balance Carryover Process and run using the following		
	Carryover		parameters:		
	Process		Parameter	Value	
			Run Mode	P (Post)	
			Current Date*	Today's Date	
			Assignment Number	Employee Identification Number	
			Plan Start Date	PTO Plan Start Date	
			*Note: This value auto-popul	ates and should not be changed.	
			Parameters in the biological descent of t		
			Run Mode P P	ost	
			Current Date 10-JAN-2025		
			Assignment Number 117375		
			Plan Start Date 01-JAN-20	24 PTO Parental EX	
		b.	Select Submit.		
			Submit		
		c.	. Once completed, the process will show a Normal status.		
			Phase Status		
			Completed Normal		
Re	esult:	•	The PTO Parental balances ad	ccrued in prior calendar years will carry over to	
			the current year and be available for the employee to view in Self Service.		
		٠	The full balances will show o	n the Net Accruals Screen.	
Ad	lditional	•	The maximum PTO Parental	balance is 60 days, or the equivalent number of	
Co	onsiderations:		hours.		
		•	Once this process has been run, the employee's PTO Parental balance will		
			continue to carry forward between calendar years through the year-end		
			carryover process, and this process will not need to be run again.		
Qu	iestions?	•	Contact <u>HRA@rfsuny.org</u>		