

PTO Parental – Run Balance Carryover Process

Purpose:	<ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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:	<ul style="list-style-type: none"> This process is only run once, if needed.
Background/ Prerequisites:	<ul style="list-style-type: none"> Employee must be eligible to accrue PTO Parental. Employee must have the PTO Parental element added to their assignment.
Reference Materials:	<ul style="list-style-type: none"> Leave Administration Handbook Paid Time Off Plan Series I Paid Time Off Plan Series II Enter PTO Parental Accrual Element

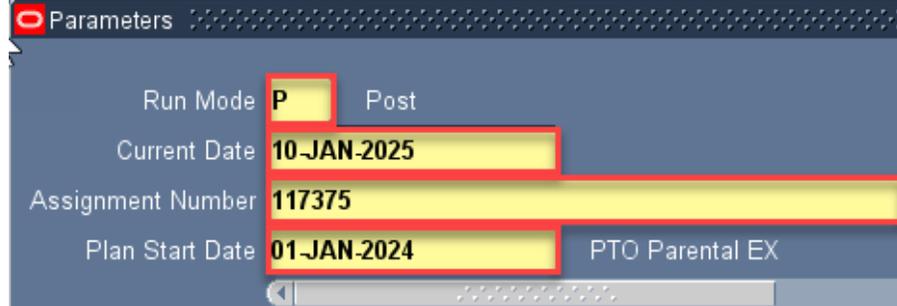
Action:	Step(s):										
1. Navigate to the Submit Request Screen in Oracle	<ol style="list-style-type: none"> Sign into the Oracle Business Applications. Navigate to Processes and Reports as outlined in the Run a Report Process Help. 										
2. Select RF PTO Parental Balance Carryover	<ol style="list-style-type: none"> On the Run this Request Screen, enter RF PTO Parental Balance Carryover in the name field. <div data-bbox="467 1165 1127 1306" data-label="Image"> </div> Select Enter on your keyboard which will allow you to enter the parameters for the process. 										
3. Run for Draft Output (Optional)	<p><i>Note: It is recommended to run the PTO Parental Balance Carryover in Draft first, to review how the balances will populate.</i></p> <ol style="list-style-type: none"> Run the PTO Parental Balance Carryover in Draft using the following parameters: <table border="1" data-bbox="513 1528 1362 1717"> <thead> <tr> <th>Parameter</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Run Mode</td> <td>D (Draft)</td> </tr> <tr> <td>Current Date*</td> <td>Today's Date</td> </tr> <tr> <td>Assignment Number</td> <td>Employee Identification Number</td> </tr> <tr> <td>Plan Start Date</td> <td>PTO Plan Start Date</td> </tr> </tbody> </table> <p>*Note: This value auto-populates and should not be changed.</p>	Parameter	Value	Run Mode	D (Draft)	Current Date*	Today's Date	Assignment Number	Employee Identification Number	Plan Start Date	PTO Plan Start Date
Parameter	Value										
Run Mode	D (Draft)										
Current Date*	Today's Date										
Assignment Number	Employee Identification Number										
Plan Start Date	PTO Plan Start Date										

5. Run the PTO Parental Balance Carryover Process

a. Once the amounts have been verified, follow steps 1 & 2 outlined above to navigate to the PTO Balance Carryover Process and run using the following parameters:

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-populates and should not be changed.



b. Select Submit.



c. Once completed, the process will show a Normal status.

Phase	Status
Completed	Normal

Result:

- The PTO Parental balances accrued in prior calendar years will carry over to the current year and be available for the employee to view in Self Service.
- The full balances will show on the Net Accruals Screen.

Additional Considerations:

- The maximum PTO Parental balance is 60 days, or the equivalent number of 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.

Questions?

- Contact HRA@rfsuny.org