Reviewing Leave

Overview

Introduction	This guide provides the procedures for reviewing leave and guidance on which leave reports are helpful in reviewing leave and how to access them through Direct Access (DA).

References
(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series)
(b) Military Assignments and Authorized Absences, COMDTINST M1000.8 (series)
(c) Reserve Policy Manual, COMDTINST M1001.28 (series)

Resources
(a) Leave Action Email Template for PPC Trouble Tickets
(b) Leave Audit Example
(c) Pay Calculation Results DA User Guide
(d) Chargeable Absences DA User Guide
(e) Non-Chargeable Absences DA User Guide

Overview

The major strength to DA is the ability to identify what is currently showing in the system before any changes are processed; and the ability to review again, after an overnight pay calculation update (see Note). This is the preferred process for SPOs performing leave audits. Reviewing pay calculation results before and after a leave correction allows for the user to verify the leave correction processed as expected.

Follow these steps for all leave audits:
a. Identify the open Calendar Leave Accumulator Balance prior to affecting changes,
b. Process any changes to correct the leave balance in DA (corrections, charge, non-chargeable, etc.)
c. Audit the same open Calendar Leave Accumulator Balance (from Step a) after changes have processed through an overnight pay calculation update (see Note).
d. The leave balance should reflect the new changes accordingly.

NOTE: Some Thursday nights do not go through an overnight pay calculation update due to system maintenance; therefore, the user may need to wait until the next business day.

Contents

Topic	See Page
Leave Programming in Direct Access	2
Reviewing Member's Leave Accumulator & Absence Data	6
Leave Reports	15

Leave Programming in Direct Access

Introduction
This section provides an overview of how DA is programmed to calculate and account for various types of leave.

Known Issues
==**Reserve leave** is not calculating correctly:==

- If a member has Reserve Active Duty Orders **spanning exactly 30 days**, DA does **NOT** credit the 2.5 days of leave, therefore, the SPO **must** submit a Trouble Ticket to PPC to manually credit the leave.

- If a member has consecutive Reserve Active Duty Orders in which each set is **less than 30 days but together totals 30 days**, DA does **NOT** credit the 2.5 days of leave, therefore, the SPO **must** submit a Trouble Ticket to PPC to manually credit the leave.

Direct Access Programming Guidance
Accumulators represent "buckets" of cumulative values. The most current, end-month calendar is generally the best place to view a member's current leave balance. How DA's programming impacts the leave balance accumulators (buckets) can be complicated:

Active Duty leave audits: Leave accrues on the end-month pay calendars. When performing a full leave audit, it must be done **end-month to end-month** for this reason.

Reserve Order leave audits: These are performed the same as Active Duty, but the starting point is from the **prior end-month before the start of the orders to the end-month of the orders**. It is very common to have to extend leave audit duration periods further on each end if leave is not approved timely.

Timing:
- If the leave approval or correction is processed **RETROACTIVELY**, the leave will be processed during the current calendar and affect the leave accumulator, regardless of the date of the leave. For example:
  - The leave dates, 09/24/2019 – 09/30/2019, were approved **after end-month SEP finalize**; therefore, the leave was processed on the mid-month October 2019 calendar.

- If the leave approval or correction is processed prior to being taken (**before finalize**), the leave will be charged to the appropriate calendar. For example:
  - The leave date, 10/31/2019, was approved **before mid-month OCT finalize**; therefore, the leave was processed on the end-month October 2019 calendar.

Leave Programming in Direct Access, Continued

Direct Access Programming Guidance, continued

Accessions/Separations/Retirements: The accession date, separation date, or retirement date determines the begin date and end date for leave accrual (i.e., leave cannot be accrued before a member is accessed into the CG and cannot accrue after a member is separated from the CG).

Lump sum leave sale: Lump sum leave (LSL) is processed through a number of ways in DA, such as through an approved contract, a separation, a retirement, and Reserve orders. The process for auditing the sale of leave is very similar to auditing regular Active Duty leave:

- The member's pay calculation results and leave accumulator balance should be reviewed.

- Once approved, the accumulator should go down by the respective number of days and the LSL payment should reflect in the current pay calculation.

- This process is the reverse when corrected by PPC MAS. A manual debt will be built for the member to repay the money and accumulators will be restored (increased) the numbers of days that were erroneously sold. See PPC webpage (P&D, MAS, and Customer Care pages for guidance in submitting these tickets).

Out-of-Range leave: Out-of-Range leave approvals are those leave transactions that are **more than a year old**.

- The member's leave accumulator balance should be reviewed **BEFORE** and **AFTER** the Out-of-Range leave is approved to verify DA processed the leave.
  - ➢ If, after a nightly pay calculation, the leave does **NOT** process, a PPC Trouble Ticket will need to be submitted to have the leave manually processed.

Reserve Leave Scenarios

For situations that involve Job Data, consult the MAS webpage for known issues and additional guidance:

a. Orders **less than 30 days** amended to greater than 30 days?
  - ➢ If yes and In-range, a Job Data Trouble Ticket submitted to PPC can correct this.
  - ➢ If out-of-range, a Trouble Ticket must be sent to PPC for review.

b. Orders **30 days exactly**. See the Known Issues on the Knowledge Base on PPC's CG Portal page.

Leave Programming in Direct Access, Continued

Reserve Leave Scenarios, continued

   c. Orders **<u>greater than 30 days</u>** amended to less than 30 days or cancelled?
- ➤ If yes, then it is possible members may have accrued erroneous leave entitlement and may need an adjustment. A leave audit should be performed and if an error is found, a Trouble Ticket should be submitted to PPC.

   d. Back to back orders, **less than 30 days individually, but 30 days or greater when combined**?
- ➤ If yes, then the SPO will need to submit a Trouble Ticket to PPC.

Fiscal Year Limitations and Special Leave Accrual

Fiscal years begin on 01 October and end on 30 September the following year. Refer to reference (b) for other scenarios that may authorize a member to carry over leave in excess of 60 days and any CG messages that establish the Fiscal year carry over authorization.

If earned leave exceeds the applicable Fiscal year limitations, the amount is to be reduced to the maximum limit and is irrevocably lost without compensation (if applicable, subtract Fiscal year leave).

Constructing Leave Periods

In order to construct a leave period for a Reservist, it is important to establish **ALL** Active Duty periods for **30 consecutive days or more**. Members are entitled to leave at a rate of **2.5 calendar days for each month**.

Review the member's Reserve Orders to identify all periods a member could earn leave from.

IAW reference (b), Chap 2.A.19.b, use the charts on the following page to construct how much leave a member should have earned based on the duration of each set of Active Duty orders. (**NOTE:** Ensure the correct chart is used based on the month reviewed, 31 days vs 30 days (including February) for begin date construction).

Leave Programming in Direct Access, Continued

Constructing Leave Periods, continued

Remember: Only Active Duty for **30 consecutive days or more** will be entitled to leave at a rate of 2.5 days for each month of Active Duty. Leave is not earned between sets of orders. Leave may only be earned while a member is on Active Duty.

Date of Month Entered on Active Duty, 31-Day Month	
1-7	2.5 days
8-13	2.0 days
14-19	1.5 days
20-25	1.0 days
26-31	0.5 days

Date of Month Entered on Active Duty, 30-Day Month, Including February	
1-6	2.5 days
7-12	2.0 days
13-18	1.5 days
19-24	1.0 days
25-30	0.5 days

This table shows the leave earned from the beginning of the month to the date of separation.

Date of Month of Separation	
1-6	0.5 days
7-12	1.0 days
13-18	1.5 days
19-24	2.0 days
25-31	2.5 days

Reviewing Member's Leave Accumulator & Absence Data

Introduction	This section provides the procedures to locate and review a member's leave accumulator and absence data in DA to determine their leave balance before and after corrections are made.

Accumulators	Accumulators represent "buckets" of cumulative values. The most recent, end-month calendar is generally the best place to view a member's current leave balance.

Helpful Tool	See the Pay Calculation Results user guide for instructions on navigating Pay Calculation Results, Accumulators, and Absence Data.

Starting Point	**Leave audits require a starting point**. The process is very simple, yet can be very time consuming depending upon the duration of the leave period:

- A begin balance or starting point must be established from which to start the audit.

- Account for the earned leave for the duration of the leave period, as applicable.

- Deduct any leave taken by the member to determine the correct leave balance.

- Determine the difference between DA and the correct leave balance to identify the manual balance adjustment entry required to correct the member's leave balance.

(Starting Point) + (Earned Leave) – (Leave Taken) = Leave Balance

The Leave Audit Example is a helpful tool to complete a full leave audit.

NOTE 1: When working a leave audit, it is important to check for any pending leave. Any pending or RETROACTIVE leave requests should be reviewed prior to approval as well.

NOTE 2: Only end-month periods for LEAVE ENT_BAL and RSV ENT_BAL are to be used for verifying leave accumulators. Mid-month periods are not clear in the processing/timing of 2.5 days for accrual because they do **NOT** show a full month's accumulation of leave.

Reviewing Member's Leave Accumulator & Absence Data,
Continued
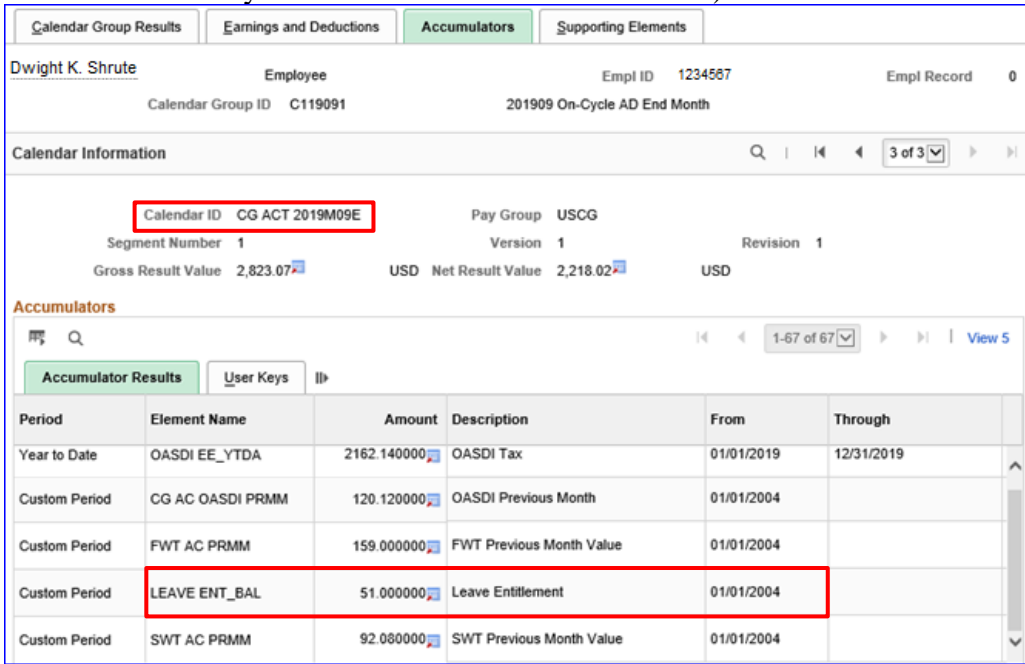
Procedures   See below.

Step	Action
1	In this example, the member initially requested leave for 09/24/19 – 09/27/19, then found they needed more time and requested additional leave from 09/28/19 – 10/03/19 that was entered into DA after they returned from leave. They also requested an additional day of leave, 10/31/19. We will review the member's leave balance for Leave Taken: • 09/24/19 – 09/27/19 (4 days LV) • 09/28/19 – 10/03/19 (6 days LV) • 10/31/19 (1 day LV) One of the first steps in reviewing leave taken is to review the leave report(s) to determine what leave was approved to be used. In looking at the Absence Request Listing report, we can confirm the member had 11 days of approved leave between 09/24/2019 – 10/31/2019. We can also see by the **Process Date**, that the September leave was approved after the end-month SPO Pay Cut (09/19/2019).

Begin_Date	End _Date	Duration (Days)	Approver EMPLID	Process Date
2019-10-31	2019-10-31	1	9876543	10/6/2019
2019-09-28	2019-10-03	6	9876543	10/6/2019
2019-09-24	2019-09-27	4	9876543	9/22/2019
2019-09-03	2019-09-03	1	9876543	9/4/2019

Last Name	First Name	EMPLID	Rank	Compone	Request Status	Descr	Submission Date	Begin_Date	End _Date	Duration (Days)	Approver EMPLID	Process Date
Shrute	Dwight	1234567	E6	AD	Approved	Leave - INCONUS	2019-09-23	2019-10-31	2019-10-31	1	9876543	10/6/2019
Shrute	Dwight	1234567	E6	AD	Approved	Leave - INCONUS	2019-10-04	2019-09-28	2019-10-03	6	9876543	10/6/2019
Shrute	Dwight	1234567	E6	AD	Approved	Leave - INCONUS	2019-09-20	2019-09-24	2019-09-27	4	9876543	9/22/2019
Shrute	Dwight	1234567	E6	AD	Approved	Leave - INCONUS	2019-08-30	2019-09-03	2019-09-03	1	9876543	9/4/2019

Reviewing Member's Leave Accumulator & Absence Data,
Continued
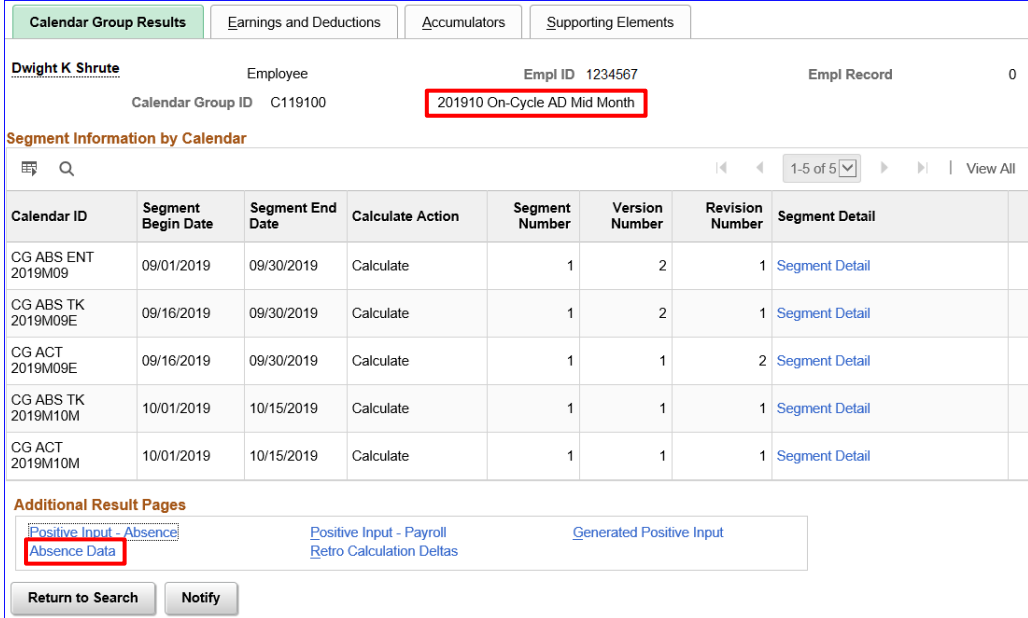
Procedures,
continued

Step	Action
2	When reviewing or auditing leave, it is important to establish a starting point (a point where we know the leave is correct). The best way to do this is to review the end-month calendar accumulator prior to the affected period or prior to the leave dates in question. This could mean going back 1 month or 2 years. In this example, because the leave in question was not processed until the mid-month October calendar (see Timing), we can review the end-month September leave accumulator to determine our **starting point, which is 51.0** (remember, earned leave is only calculated on end-month calendars).

Reviewing Member's Leave Accumulator & Absence Data,
Continued

Procedures,
continued

Step	Action
3	Because all the leave being reviewed in this example was approved **after** September end-month Pay Cut (09/19), we need to review the mid-month and end-month October pay calendars to review the leave taken. Navigate to the **mid-month October** pay calendar and select **Absence Data**.

Reviewing Member's Leave Accumulator & Absence Data,
Continued

Procedures,
continued

Step	Action
4	Ensure the **Absence Data** tab is displayed and **scroll** through the calendars to locate the appropriate **CG ABS TK** calendar for the specified period. In this example, the end-month September absence taken calendar is page 2. **Remember:** In this example, the member took leave from 09/24/19 – 10/03/19 and 10/31/19. The end-month September ABS TK calendar reflects the leave taken from **09/24/19 – 09/30/19** and indicates the new leave balance as each day is charged (** the leave wasn't approved until after end-month pay cut, therefore the leave was **processed on the October** mid-month calendar and **applied to the September** end-month ABS TK calendar). ![Absence Data screen showing leave take records for Dwight K. Shrute, Empl ID 1234567, Calendar Group ID C119100, Calendar ID CG ABS TK 2019M09E. Table of Leave Take records from 09/24/2019 to 09/30/2019 with entitlement balances from 50 down to 44.]

Continued on next page

Reviewing Member's Leave Accumulator & Absence Data,
Continued

Procedures,
continued

Step	Action
5	Because we are remaining in the October mid-month pay calendar, continue to **scroll** through the calendars to locate the appropriate **CG ABS TK** calendar for the specified period. In this example, the mid-month October absence taken calendar is page 4. The mid-month October pay calendar reflects the leave taken from **10/01/19 – 10/03/19** and indicates the new leave balance as each day is charged. **Remember:** In this example, the member took leave from 09/24/19 – 10/03/19 and 10/31/19. The mid-month October pay calendar reflects the leave taken from 10/01/19 – 10/03/19.

Reviewing Member's Leave Accumulator & Absence Data,
Continued

Step	Action
6	Once the end-month October pay calendar is available, we can review the current leave balance and verify the leave taken for 10/31/2019 (because it was approved on 10/06). The end-month October leave accumulator indicates a leave balance of 42.5.
7	Return to the **Calendar Group Results** and select **Absence Data**.

12

Reviewing Member's Leave Accumulator & Absence Data, Continued

Procedures, continued

Step	Action
8	Ensure the **Absence Data** tab is displayed and **scroll** through the calendars and locate the appropriate CG ABS TK calendar.

Continued on next page

Reviewing Member's Leave Accumulator & Absence Data,
Continued

Procedures,
continued

Step	Action
9	The Starting Point established in Step 1 was 51.0. The member used 11.0 days of leave and earned 2.5 days of leave in October; therefore, the member's leave balance should be 42.5. (Starting Point = 51.0) + (2.5 Earned Leave) – (11.0 Total Leave Taken) = **42.5 Leave Balance**

Leave Reports

Introduction	This section provides a list of the various reports and sources to determine all leave types, leave dates taken and/or sold, and general guidance for determining date ranges when working a leave audit.

Date Ranges	To ensure **ALL** leave is captured for the affected period; the **Begin Date must be the first day of the month** and the **End Date must be the last day of the month** of the affected period.

It is important to enter full month periods for begin and end dates when running reports in DA. To ensure **all** leave dates are captured, it is recommended to **enter at least one full month prior to the begin leave date and one full month after the end leave date**.

Example 1: If the period being audited falls between 3 Dec 2017 and 22 Jan 2020; the report dates should be entered from 1 Nov 2017 through 29 Feb 2020.

Example 2: If the period being audited falls between 15 Feb 2015 and 22 Nov 2018; the report dates should be entered from 01 Jan 2015 through 31 Dec 2018.
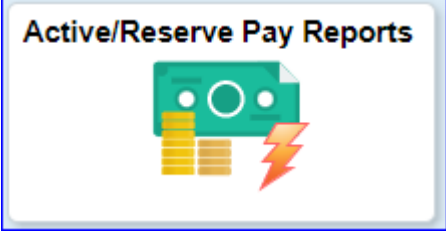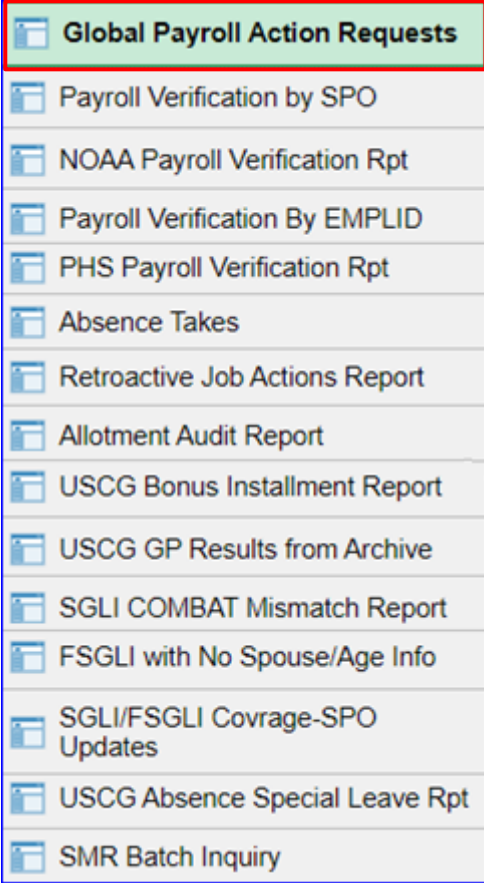
Compiling All Leave Types and Dates Used	Not all reports in DA capture all leave types, but the combination of the below sources will. Not all the leave reports may be necessary depending on the member's leave issue and hire date(s). Navigation to each leave source listed below is shown in the following blocks: • **Global Payroll Action Requests** • **Absence Takes** • **Absence Request Listing** • **Leave Correction Report**

Leave Reports, Continued

Global Payroll Action Requests	This report shows all leave transactions that have been processed, corrected, or deleted in DA within a specified time frame. This allows the user to review any leave transaction to ensure its validity.

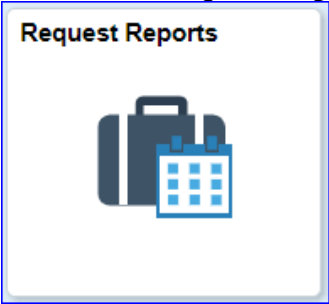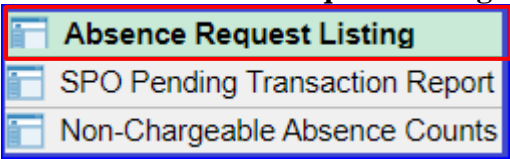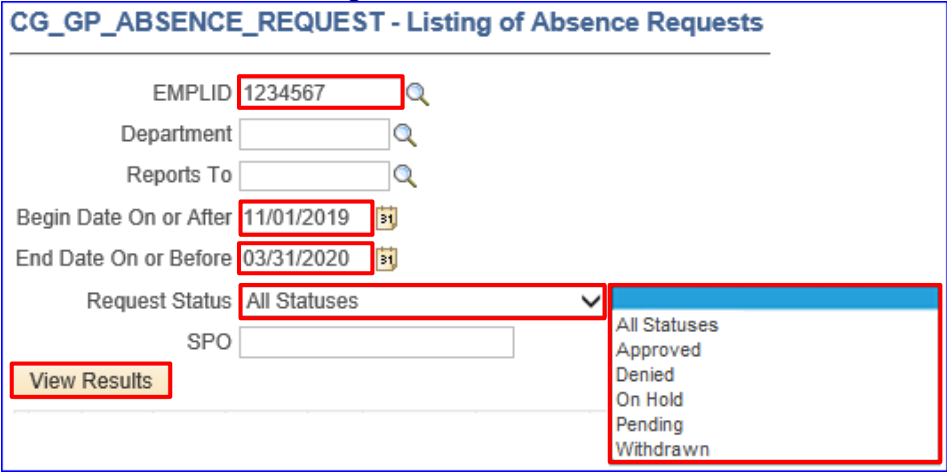| Step	Action
1	Click on the **Active/Reserve Pay Reports** Tile. This report requires two separate action requests be run: **Absence Requests** and **Leave Correction Requests**. **NOTE:** Voided leave will not appear here. It will only show approved. **Active/Reserve Pay Reports**
1.5	The default **Global Payroll Action Requests** option will automatically display. Global Payroll Action Requests Payroll Verification by SPO NOAA Payroll Verification Rpt Payroll Verification By EMPLID PHS Payroll Verification Rpt Absence Takes Retroactive Job Actions Report Allotment Audit Report USCG Bonus Installment Report USCG GP Results from Archive SGLI COMBAT Mismatch Report FSGLI with No Spouse/Age Info SGLI/FSGLI Covrage-SPO Updates USCG Absence Special Leave Rpt SMR Batch Inquiry

Leave Reports, Continued

**Global Payroll
Action
Requests**,
continued

Step	Action
2	To run the action request report for **Absence Requests**: • Using the Category lookup, select **PAYROLL** • Using the Action lookup, select **ABSENCE_REQUEST** • Enter the member's **Empl ID** • **Entered After –** this will be the begin date of the report (any leave entered after this date). • **Entered Before** – this will be the end date of the report (any leave entered before this date). Click **View Results**. **CG_GP_ACTION_REQUEST_HISTORY - Global Payroll Action Requests** Category PAYROLL Action ABSENCE_REQUEST Empl ID 1234567 Entered After 11/01/2019 Entered Before 03/31/2020 Company View Results

Leave Reports, Continued

Global Payroll Action Requests, continued

Step	Action
2 (cont.)	To run the action request report for **Leave Correction Requests**: • Using the Category lookup, select **PAYROLL** • Using the Action lookup, select **LEAVE_CORRECTION_REQUEST** • Enter the member's **Empl ID** • **Entered After** – this will be the begin date of the report (any leave entered after this date). • **Entered Before** – this will be the end date of the report (any leave entered before this date). Click **View Results**.
3	The report will display. To download the results to a spreadsheet, select **Excel Spreadsheet**.

Leave Reports, Continued

Absence Takes   This report provides a listing of all approved or voided absences for a member for a specific time frame in Direct Access (DA).

Step	Action
1	Click on the **Active/Reserve Pay Reports** Tile. **NOTE:** Leave data related to PCS will display on this report that may not be identified on other reports. Alternatively, if the member has current PCS orders, it is important to review them for any leave that is to be taken that may not have been charged against the member's leave balance yet. **Active/Reserve Pay Reports**
1.5	Select the **Absence Takes** option. **Global Payroll Action Requests** Payroll Verification by SPO NOAA Payroll Verification Rpt Payroll Verification By EMPLID PHS Payroll Verification Rpt Absence Takes Retroactive Job Actions Report Allotment Audit Report USCG Bonus Installment Report USCG GP Results from Archive SGLI COMBAT Mismatch Report FSGLI with No Spouse/Age Info SGLI/FSGLI Covrage-SPO Updates USCG Absence Special Leave Rpt SMR Batch Inquiry

Leave Reports, Continued

Absence Takes,
continued

Step	Action
2	Enter the member's **Empl ID**. Enter a **Begin Date** and **End Date**. Click **View Results**.
3	The report will display. To download the results to a spreadsheet, select **Excel Spreadsheet**.

Continued on next page

Leave Reports, Continued

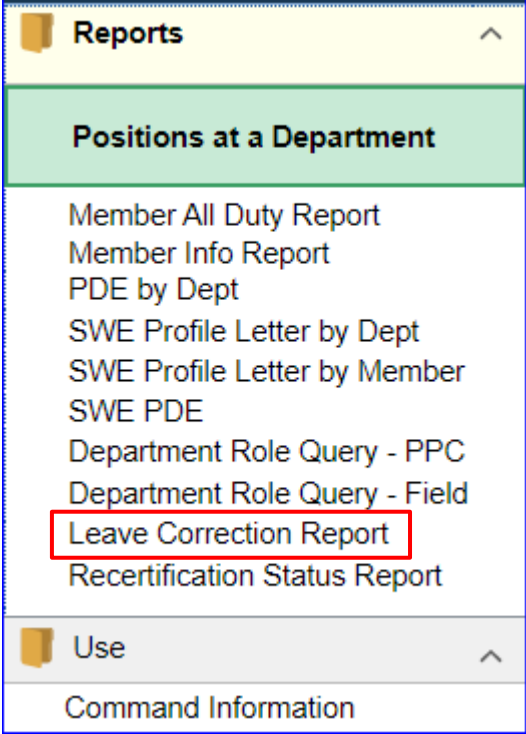**Absence Request Listing**   This report monitors all absence requests for a member in DA.

Step	Action
1	Click on the **Request Reports** Tile.
1.5	The default **Absence Request Listing** option will automatically display.
2	Enter the member's **EMPLID**. Enter **Begin Date On or After**, **End Date On or Before**, and select a **Request Status**. Click **View Results**.
3	The report will display. To download the results to a spreadsheet, select **Excel Spreadsheet**.

Leave Reports, Continued

Leave Correction Report	This report will display all leave transactions that have been corrected or deleted within a specified timeframe and ensure they are valid.

Step	Action
1	Click on the **Self Service for Commands** Tile.
2	Select the **Leave Correction Report** option from the Reports drop-down.

Leave Reports, Continued

**Leave
Correction
Report**,
continued

Step	Action
3	The CG_LEAVE_CORRECTION_RPT – Leave Correction Report page will display. The **Set ID** defaults to 00010 (leave as is). Using the lookup, select the appropriate **Relation Type**.

- **CG_DEPT_ORG** – Official CG Org Structure
- **CG_ISC** – Higher level Sector and Base departments
- **CG SPO** – All units supported by that SPO

Leave Reports, Continued

**Leave
Correction
Report**,
continued

Step	Action
4	Enter the **Department ID**. Enter a **Start Date** and **End Date** (this should be a date range, not the actual dates of the leave). Click **View Results**. **CG_GP_LEAVE_CORRECTION_RPT - Leave Correction Report** Set ID (Use 00010 for CG) 00010 Relation Type CG_DEPT_ORG Department 000450 Start Date 01/01/2019 End Date 12/31/2019 View Results
5	The report will display. To download the results to a spreadsheet for easier sorting and review, select **Excel Spreadsheet**. Download results in : Excel SpreadSheet CSV Text File XML File (9 kb) View All |	ID	Empl Record	Name	Middle	Dept ID	Dept	OPFAC	Rank	Original Leave Begin Date	Original Leave End Date	New Leave Begin Date	New Leave End Date	Correcti Type
1	1234567	0	Jim Halpert	A.	036414	PPC SUPPLY/ADMIN SECTION	47400	YN1	04/18/2019	04/19/2019	04/19/2019	04/19/2019	Correctic	 PAY AND