# TOPICS

1.  TDI Processing

    - Framework

    - Scenarios:

        - Retroactive Approval

        - Current Period Approval

    - Resources

# DISCLAIMER

- The specific scenarios outlined in this training have been overly simplified for training purposes.

- Figures used to illustrate payment information is fictitious for training purposes.

- As individual employees' circumstances and situations are different, please consult with your HR Authority for specific guidance on entering employee data.

# Temporary Disability Insurance Framework



Sample Retroactive TDI Scenario Outline
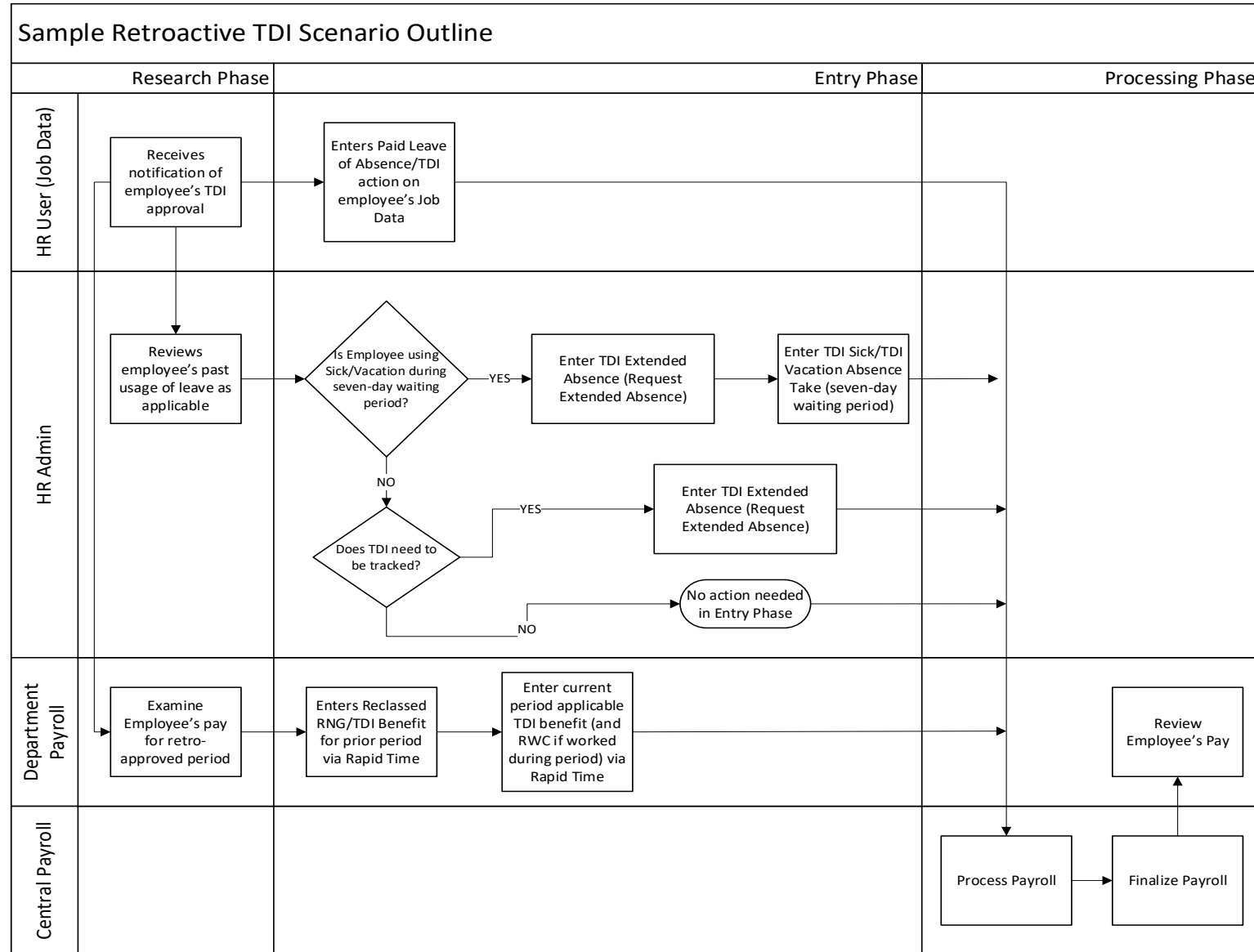
# Scenario 1: Retroactive TDI Approval

- Employee is approved for TDI for a past pay period where payroll has been finalized and may elect to use sick and/or vacation to supplement remaining seven-day day waiting period.

  - Sample Employee: After-the-Fact pay schedule

    - Retroactively approved TDI 10/25/2021

    - Will be using 40 hours of Sick Leave during seven-day waiting period

  - Payroll Processing for 12/03/2021

  - Pay Period Dates Referenced in Scenario: 10/16 – 10/31/2021 (retro), and 11/01 – 11/15/2021 (current)

# Scenario 1: Retroactive TDI Approval – HR User

Enter Paid Leave of Absence/TDI action on Job Data

# Scenario 1: Retroactive TDI Approval – HR User

| Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation | PAS | Hi Exec Job | Job Earnings Distribution |
|---|---|---|---|---|---|---|---|---|

Empl ID ▢

Employee

Empl Record 0

**Work Location Details** ❓    Find    First ◀ 1 of 2 ▶ Last

*Effective Date 10/25/2021 📅 HR Status Active    Payroll Status Leave With Pay    Go To Row    ➕ ➖

Effective Sequence 0    *Job Indicator Primary Job ⌄

*Action Paid Leave of Absence ⌄

*Reason Temporary Disability Insurance ⌄

Current

- Enters the Paid Leave of Absence/TDI action on Job Data

  - Stops Employee's regular pay from being automatically processed during payroll (salaried) while still allowing TDI benefit and waiting-period leaves to be paid

  - Marks effective date of receiving TDI benefit

  - *Note: If the effective date of the TDI leave is prior to the most current-dated action, DHRD or HR Authority will need to intervene to insert the Paid Leave of Absence/TDI action via "Correct History."*
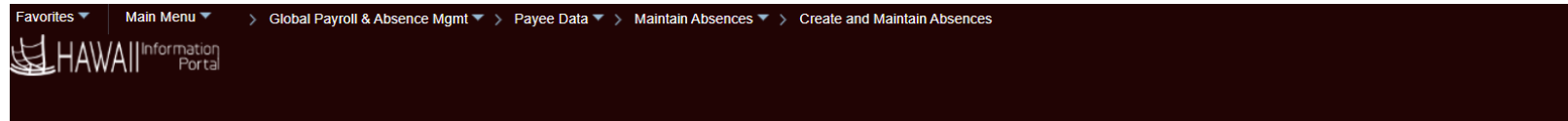
# Scenario 1: Retroactive TDI Approval – HR Admin

Phase 1: Research of Past Leaves in Approved TDI Period
Phase 2: Entering TDI Sick and/or Vacation for Seven-Day Waiting Period

# Phase 1: Research Past Leaves in Approved TDI Period

- HR Admin looks for leave that was taken from 10/16/21 – 10/31/21

- Leave taken in period from 10/17 – 10/24 need to be reclassed to TDI Sick/Vacation during seven-day waiting period

- Leave taken from 10/25 – 10/31 would also need to be reclassed to TDI

- **Method: Create and Maintain Absences**

  - *Helpful Queries: HIP_TL_EE_BAL_BY_PERIOD and HIP_TL_EE_APPRVD_LV_DTRNG*

- Navigation: Global Payroll & Absence Mgmt> Payee Data> Maintain Absences> Create and Maintain Absences

# Cancel Prior Absence Request

- Click on **Cancel Absence Requests**

- Select 10/25/21 leave

- Select Cancel Reason ***Not Valid***

- Select appropriate ***Submit Option***: Approve Automatically or Use Absence Name Default

  - *Note: Recommended to use Approve Automatically since this is to reclassify leave for TDI. If the <u>Approve Automatically</u> option is not used, the supervisor must approve the offsetting transaction to reverse the regular leave. If the offset is not approved, the date cannot be used to document any TDI sick and/or vacation.*

  - As the employee's first day of TDI benefits is October 25, the HR Admin is only required to cancel the original absence, then enter the TDI Extended Absence for the seven-day waiting period (or otherwise required to record based on individual department standards). The Payroll user will enter the TDI benefit payment as part of their process.

| *Start Date | *End Date | *Absence Name | Reason | Duration | Attachment | Original Begin Date | Entry Source | Status | Cancel Reason |
|---|---|---|---|---|---|---|---|---|---|
| 10/25/2021 | 10/25/2021 | 01 - Sick Leave | | 8 Hours | View/Add | 10/25/2021 | Administrator Absence Event | Approved | Not Valid |

# Phase 2: Entering TDI Sick and/or Vacation (optional)

- Phase 2 dependent on Employee's remaining sick and vacation balances

  - Department internal policy relating to recording TDI leave

- Sick and vacation usage related to seven-day waiting period entered through Extended Absence

  - Approved Extended Absence allows HR Admin to enter the TDI Sick/Vacation for use during the seven-day waiting period

# Request Extended Absence as HR Admin

- Navigation: Global Payroll & Absence Mgmt> Payee Data> Maintain Absences> Request Extended Absence

# Add TDI Sick/Vacation – Administer Extended Absence

- Navigation: Global Payroll & Absence Mgmt> Payee Data> Maintain Absences> Administer Extended Absence

# Add TDI Sick/Vacation – Administer Extended Absence



- 40 hours Sick Leave used for the seven-day waiting period

# Scenario 1: Retroactive TDI Approval – Payroll User

Phase 1: Research of Employee's Prior Paychecks

Phase 2: Reclassifying Prior Period Earnings to TDI and Entering Current TDI Benefit

# Phase 1: Research of Employee's Prior Paychecks

- Payroll looks to see how Employee was paid for the 10/16 – 10/31 pay period

- Earnings from 10/16 – 10/31 period (seven-day waiting period plus rest of period for TDI benefits) needs to be reclassified to appropriate TDI earnings

- **Method: Review Paycheck**

  - *Helpful Query: HIP_TL_HRS_WORKED*

  - *HIP_TL_OK_TO_PAY_TURNED_OFF* – Used to identify employees on WC/TDI and stop automated pay from processing (current period)

# Research of Employee's Prior Paychecks

- Navigation: Payroll for North America> Payroll Processing USA> Produce Payroll> Review Paycheck

| Paycheck Earnings | Paycheck Taxes | Paycheck Deductions |
|---|---|---|

**Empl ID** ▓▓▓▓    **Name** ▓▓▓▓

**Company** SOH    **Pay Group** ATF    **Pay Period End** 10/31/2021    **Page** ▓▓▓    **Line** 1    **Separate Check**

**Paycheck Information**

| | |
|---|---|
| Paycheck Status | Confirmed |
| Issue Date | 11/19/2021 |

Paycheck Option  Advice

Paycheck Number  ▓▓▓▓

☐ Off Cycle    ☐ Reprint    ☐ Adjustment    ☐ Corrected    ☐ Cashed

**Paycheck Totals**

| | |
|---|---|
| Earnings | 2,625.50 |
| Taxes | 546.81 |
| Deductions | 257.76 |
| Net Pay | 1,820.93 |

# Research of Employee's Prior Paychecks



- Paid normal semi-monthly salary for period

- 8 hours Sick Leave

# Phase 2: Reclassifying Prior Period Earnings to TDI and Entering Current TDI Benefit

- Earnings from 10/16 – 10/24 needs to be reclassed to TDI Sick/Vacation during the seven-day waiting period

- Earnings from 10/25 – 10/31 period (start of TDI benefits) needs to be reclassified to appropriate TDI earnings

- **Method: Rapid Time**

    - Navigation: Time and Labor > Report Time> Rapid Time

# What Information Do We Need to Reclassify Earnings?

| Classification of Amount | Amount | Amount that will load to payroll | Source of Payment |
|---|---|---|---|
| 10/18-10/22 TDI Sick Hours at annualized rate (40*30.294231) | 1,211.77 | 1,211.77 | Extended Absence entries from Part II (TDI SICK) |
| 10/25 – 10/31: TDI Payment | 702.82 | 702.82 | Rapid Time (TDI TRC) |
| 10/16 – 10/24: RNG Needed to reclass TDI Sick from HR Admin Entry: | (1,211.77) | | N/A RNG load as one lump sum |
| 10/25 – 10/31: RNG Needed to reclass TDI benefit: | (702.82) | | N/A RNG load as one lump sum |
| **10/16 – 10/31: Total RNG Entered:** | (1,914.59) | (1,914.59) | Rapid Time (RNG TRC) |
| | Total Payment to EE | 0 | |

- Purpose of **RNG** – Reclassify type of pay

- Difference between total check paid vs. what should have been paid – Processed via Overpayment Recovery (OPR)

# Payment Information



- 10/16 – 10/31 Total Paid: $2625.50

- 10/18 – 10/22 TDI Sick (waiting period) Reclassified: $1211.77

- 10/25 – 10/31 TDI Benefit: $702.82

- Sum of TDI Sick and TDI Benefit: $1914.59

- Total Paid – Sum REG/TDI = $2625.50 – $1914.59 = **$710.91 Difference processed as Overpayment Recovery**

# Entering TDI Reclass on Rapid Time

- Navigation: Time and Labor > Report Time> Rapid Time



- If TRCs need to be charged to a different UAC, choose the appropriate combo code

# Entering Current Period TDI on Rapid Time

**Rapid Detail Information**

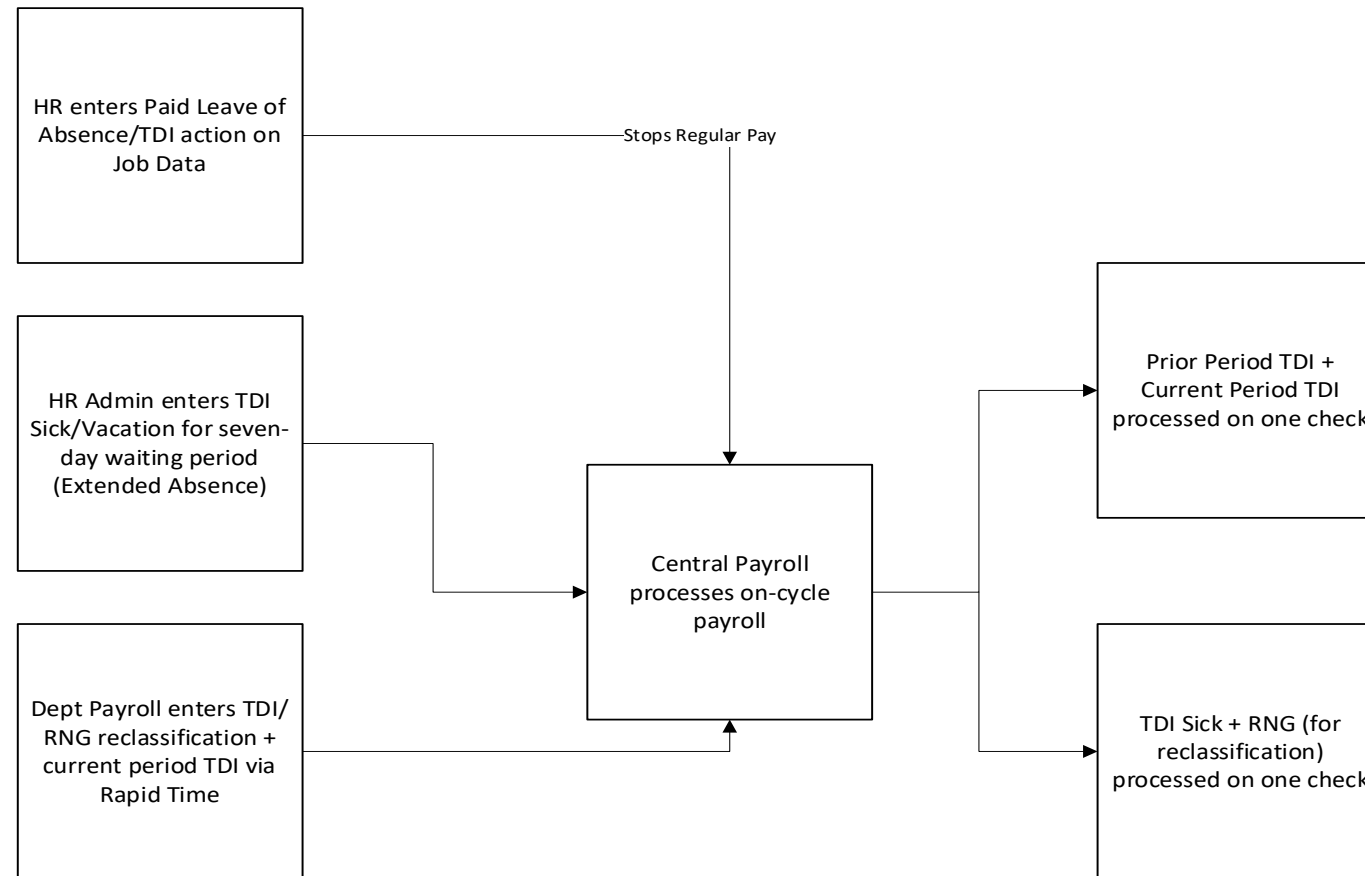| Delete | *Empl ID | Empl Record | Last Name | Suffix | First Name | Middle | *Date | TRC | Quantity |
|---|---|---|---|---|---|---|---|---|---|
| ☐ | 🔍 | 0 🔍 | | | | | 10/31/2021 📅 | RNG - R ⌄ | -1914.590000 |
| ☐ | 🔍 | 0 🔍 | | | | | 10/31/2021 📅 | TDI - TD ⌄ | 702.820000 |
| ☐ | 🔍 | 0 🔍 | | | | | 11/15/2021 📅 | TDI - TD ⌄ | 1522.79 |

Current Period entry can be entered on the same session as the reclassification.

- Reminder: Since HR entered the **Paid Leave of Absence/TDI** action on Job Data, Payroll only needs to enter TDI Benefit payment
  - No RNG for current period is needed since regular pay will be turned off moving forward

# Scenario 1: Retroactive TDI Approval – Payroll Processing

# Payroll Processing Reclassification Effects

- ***Due to TDI processing, please work with Central Payroll to ensure reclassification efforts are handled appropriately***
  - Employee's Regular pay is shut off for current period since HR entered the **Paid Leave of Absence/TDI** action on Job Data

```
┌─────────────────────┐
│ HR enters Paid Leave│
│ of Absence/TDI action│ ──── Stops Regular Pay ────┐
│ on Job Data         │                            │
└─────────────────────┘                            │
                                                   ▼
┌─────────────────────┐                   ┌──────────────────┐      ┌──────────────────────┐
│ HR Admin enters TDI │                   │                  │ ───▶ │ Prior Period TDI +   │
│ Sick/Vacation for   │                   │ Central Payroll  │      │ Current Period TDI   │
│ seven-day waiting   │ ────────┐         │ processes on-cycle│      │ processed on one check│
│ period (Extended    │         │────────▶│ payroll          │      └──────────────────────┘
│ Absence)            │         │         │                  │
└─────────────────────┘         │         │                  │ ───▶ ┌──────────────────────┐
                                │         └──────────────────┘      │ TDI Sick + RNG (for  │
┌─────────────────────┐         │                                   │ reclassification)    │
│ Dept Payroll enters │         │                                   │ processed on one check│
│ TDI/RNG reclassifi- │ ────────┘                                   └──────────────────────┘
│ cation + current    │
│ period TDI via      │
│ Rapid Time          │
└─────────────────────┘
```

# END OF SCENARIO 1

# Scenario 2: Current Period TDI Approval

- Employee is approved for TDI for the current pay period that payroll is processing and is electing to use sick and/or vacation to supplement their seven-day waiting period.

  - Sample Employee: After-the-Fact pay schedule

    - Approved for TDI effective 11/08/2021

    - Exhausting 36.83 Sick Leave hours during seven-day waiting period

  - Payroll Processing for 12/03/2021

  - Pay Period Dates Referenced in Scenario: 11/01/21 – 11/15/21

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|---|---|---|---|---|---|---|
| 31 | 1 | 2 | 3 | 4 | 5 | 6 |
| DATE OF DISABILITY | SEVEN DAY WAITING PERIOD | | | | | |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| | TDI | | | | | |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |

# Scenario 2: Current Period TDI Approval – HR User

Enter Paid Leave of Absence/TDI action on Job Data

# Scenario 2: Retroactive TDI Approval – HR User



- Enters the Paid Leave of Absence/TDI action on Job Data

  - Stops Employee's regular pay from being automatically processed during payroll (salaried) while still allowing TDI benefit, leave taken during seven-day waiting period, and worked hours (if applicable) to be paid manually

  - Marks effective date of TDI benefits

  - *Note: If the effective date of the TDI leave is prior to the most current-dated action, DHRD or HR Authority will need to intervene to insert the Paid Leave of Absence/TDI action via "Correct History."*

# Scenario 2: Current Period TDI Approval – HR Admin

Entering TDI Sick/Vacation leave during seven-day waiting period

# Entering TDI Sick and/or Vacation (optional)

- Dependent on Employee's remaining sick and vacation balances

  - Department internal policy relating to recording TDI leave

- Sick and vacation usage related to seven-day waiting period entered through Extended Absence

  - Approved Extended Absence allows HR Admin to enter the TDI Sick/Vacation for use during the seven-day waiting period

# Request Extended Absence as HR Admin

- Navigation: Global Payroll & Absence Mgmt> Payee Data> Maintain Absences> Request Extended Absence

# Add TDI Sick/Vacation – Administer Extended Absence

- Navigation: Global Payroll & Absence Mgmt> Payee Data> Maintain Absences> Administer Extended Absence

# Add TDI Sick/Vacation – Administer Extended Absence



- Exhausting remaining 36.83 hours Sick Leave used for the seven-day waiting period

# Scenario 2: Current Period TDI Approval – Payroll User

Enter Current Period TDI and RWC (if Employee worked partial period prior to TDI approval date) or RNG (to reduce salary if Paid Leave of Absence/TDI action not taken) via Rapid Time

# Entering Current TDI Benefit

- Verify if the Employee has been placed on **Paid Leave of Absence/TDI** status

  - *Helpful Query: HIP_TL_OK_TO_PAY_TURNED_OFF* – Used to identify employees on WC/TDI and stop automated pay from processing (current period)

- **Method: Rapid Time**

  - Navigation: Time and Labor > Report Time> Rapid Time

# Entering TDI on Rapid Time

- Navigation: Time and Labor > Report Time> Rapid Time



- If TRCs need to be charged to a different UAC, choose the appropriate combo code

# Entering TDI on Rapid Time

**Rapid Detail Information**

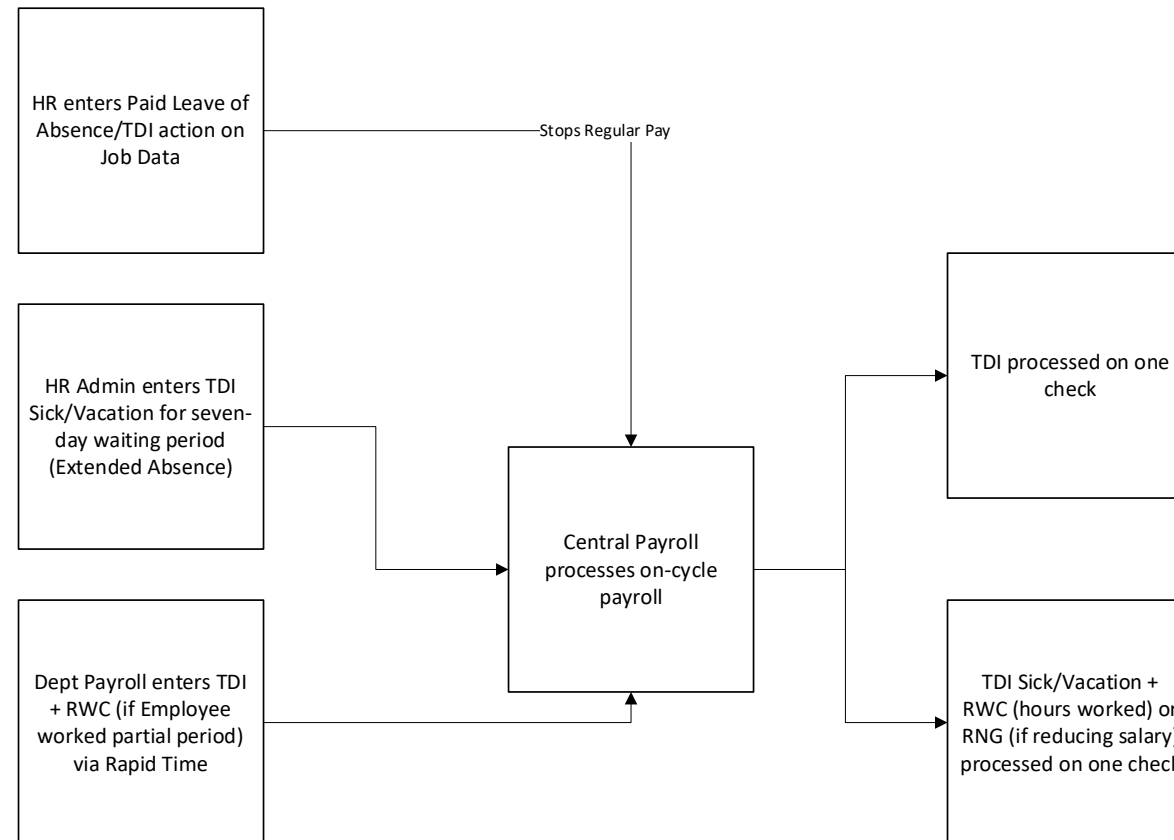| Delete | *Empl ID | Empl Record | Last Name | Suffix | First Name | Middle | *Date | TRC | Quantity |
|--------|----------|-------------|-----------|--------|------------|--------|-------|-----|----------|
| ☐ | 🔍 | 0 🔍 | | | | | 11/15/2021 📅 | TDI - TD ∨ | 750.000000 |
| ☐ | 🔍 | 0 🔍 | | | | | 11/15/2021 📅 | RNG - R ∨ | -875.16 |

If Employee was not placed on Paid LOA/TDI, then RNG is needed to reduce automatic salary.

- If Employee is not placed on **Paid Leave of Absence/TDI** status on Job Data, **RNG** is needed to reduce the automatic salary

# Scenario 2: Current Period TDI Approval – Payroll Processing

# Payroll Processing Effects

- Employee's Regular pay is shut off for current period since HR entered the **Paid Leave of Absence/TDI** action on Job Data
  - If the action was not entered, automatic salary would process, and Payroll would enter **RNG** to reduce the automatic salary

HR enters Paid Leave of Absence/TDI action on Job Data

Stops Regular Pay

HR Admin enters TDI Sick/Vacation for seven-day waiting period (Extended Absence)

Dept Payroll enters TDI + RWC (if Employee worked partial period) via Rapid Time

Central Payroll processes on-cycle payroll

TDI processed on one check

TDI Sick/Vacation + RWC (hours worked) or RNG (if reducing salary) processed on one check

# Additional Resources

- [TDI Workflow Guide](#)

- [Managing TDI Leave ](#)(video)

# MAHALO FOR YOUR TIME!