Introduction

“Donation” plan is a new plan introduced by Oracle starting 19D. Although I was able to make out how / why the plan was designed (reading through oracle official documentation) but did not found any practical (hands-on example) providing the detail steps to demonstrate the usage.

As such, I would try to make an attempt and hope I would be successful.

But before I delve deep into the topic lets try to understand what a Donation Plan is and when it can be used.

Donation Plan – Usage

Donation Plan is a specific plan where-in co-workers would like to donate their Accrual Plan Balance among themselves. Imagine one of your co-worker has got seriously fell ill and have run out of his paid leaves. In this case, some of his co-worker might donate their accrued leave to him. Donation Plan can be used in these cases. This is also more relevant in context of COVID-19 disease too.

Diagrammatically the concept of Donation Plan from Donor to Recipient can be explained as below:

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Worked-Out Example

We can break down the entire process into sub-steps which are as below:

1. Create a Donation Plan
2. Enable “Donation” property for a existing Accrual Plan
3. Initiate Donation from Donor’s Accrual Plan to Recipient’s Donation Plan
4. Once the Recipient’s Donation Plan receives the balance a Transfer Balance can be initiated which will transfer Balance from Recipient’s Donation Plan to Recipient’s Accrual Plan
5. The new balance received in Recipient’s Accrual Plan can be used now for booking / recording absences.

Create a Donation Plan

We will create a new plan “AH Donation Plan” , the various attribute values of this plan are as below

|  |  |
| --- | --- |
| Plan Attributes | |
| **Attribute Name** | **Attribute Value** |
| Effective Start Date | 01/01/1951 |
| Plan Type | Donation |
| Management | User-Defined |
| Legislation | United States |
| Plan | AH Donation Plan |
| Plan UOM | Hours |
| Legislative Data Group | US Legislative Data Group |
| Status | Active |

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|  |  |
| --- | --- |
| Plan Rules | |
| **Attribute Name** | **Attribute Value** |
| Balance Reporting (Frequency) | Repeating Period |
| Balance Reporting (Repeating Period) | Yearly Accrual Processing Period |
| Plan Limits (Ceiling Rule) | No limit |
| Plan Limits (Allow negative balance) | Checked |
| Termination Rules (Disburse Positive) | Checked |
| On Employment Termination (Recover Negative Balance) | Checked |

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|  |  |
| --- | --- |
| Entries and Balances | |
| **Attribute Name** | **Attribute Value** |
| Balance Updates (Balance transfer across plans) | Checked |
| Balance Updates (Other adjustments) | Unchecked |
| Discretionary Disbursement (Enable for Administrator) | Checked |
| Discretionary Disbursement (Disbursement Rule) | Flat Amount |
| Discretionary Disbursement (Minimum) | 1 Hours |
| Discretionary Disbursement (Maximum) | Hours |
| Discretionary Disbursement (Increment) | 1 Hours |

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Enable Donation Property for existing Accrual Plan

We would enable the donation action on an existing Accrual Plan. “Vacation” plan for this example.

***Navigation: Setup and Maintenance -> Manage Absence Plans -. Search for Vacation-> Entries and Balance***

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Initiate Donation from Donor’s Accrual Plan to Recipient’s Donation Plan

For this example, we will assume that the Donor is Emp#40 and Recipient is Emp#42. For this we would need to do two actions:

1. Add “AH Donation Plan” in Manage Absence Records -> Plan Participation section for Emp#42
2. Add a Alias so that the Recipient’s details are not disclosed.

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Now, we will navigate to Emp#40 and initiate donation.

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Transfer Balance from Recipient’s Transfer Plan to Recipient’s Accrual Plan

We can now navigate to Recipient’s Manage Absence Records (Plan Participation section) and we should see the balance against AH Donation Plan.

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Now we will initiate a “Transfer Balance” Action

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And once the action is complete, we would see that Balance will reflect in the Vacation Plan.

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We could see that the Balance is reflected correctly against the “Vacation Plan” and this could be used for recording absences.

And with this, I have come to end of the article.

Hope this was a useful read.

Thanks all for your time, have a nice day ahead.