# HR Staff have three potential activities for New Year Leave Processing:

### Manage Excess Carryover Leave for eligible employees

### Manage Leave Accruals for employees hired between 12/25/20 & 1/10/21

### Reload STD and Parental Leave Balances

# Steps to accomplish these tasks are provided below

# --------Perform these steps after January 13th and prior to January 20th --------

# Manually key excess leave for Classified Employees with Leave Carryover Exception Forms:

Performing these steps now will provide your employees with the most up to date and accurate leave balances. However you can perform these steps later and the retro-trigger process will add the balances to begin on 1/10 and will reprocess any Annual leave requests impacted by the addition of the Excess Leave.

* **Admin/Faculty Old Annual Leave Plan prior to 2007 (Plan 11)** will automatically receive excess leave balances. No manual processes are required.
* **Admin/Faculty Old Annual Leave Plan after 2007 (Plan 36)**

### Perform the following steps to enter Excess Leave

1. Go to the **Adjust Absence** page
2. Key in the employee’s ID
3. Key in the proper EX1 calendar name – remember, calendar names include the employee pay group number. For example, a 070 pay group employee will be in the: (college letter) 070210110EX1 calendar.
4. Click Search
5. On the Adjust Absence Balance page, select **Plan 48ANLPROFACA**
6. Key the hours of Excess Leave
7. Click Save
* **Classified Staff (Plan 29)** employees must submit proper documentation to carry over greater amounts than policy allows

*Note, review the Excess Carryover Leave Report(s) produced by the SSC and posted to your College File Exchange folder. This document will provide you with an accurate amount of Excess Leave existing for the employee as of the end of 2020.*

### Perform the following steps to enter Excess Leave

1. Go to the **Adjust Absence** page
2. Key in the employee’s ID
3. Key in the proper EX1 calendar name – remember, calendar names include the employee pay group number. For example, a 074 pay group employee will be in the: (college letter) 074210110EX1 calendar.
4. Click Search
5. On the Adjust Absence Balance page, select **Plan 61ANLCLSLV**
6. Key the hours of Excess Leave
7. Click Save

**When you place the leave into these excess leave plans, it is managed according to state policy:**

* When the employee selects to use their annual leave, HRMS will automatically deduct from the excess leave plans until these balances are exhausted.
* On July 9th, any excess leave balances remaining in these plans are automatically removed.

# Actions required for New Hires/Transfers between 12/25/20 & 1/10/21 who receive Leave Benefits

During the time period 12/25 – 1/10, a minor flaw in the Calendar Processing Logic causes the employee to accrue Annual Leave incorrectly.

* An employee hired 12/25 or 1/10 will receive an extra annual leave accrual
* An employee hired 12/26 – 1/9 should not receive an accrual, but may receive an annual leave accrual.

### To correct this issue, perform the following steps:

## Go to Query Viewer and run this query: VX\_AM\_LST\_NEW\_HIRES

## Key the AM Begin Date 12/25/20 & AM End Date 1/10/21

An example (using last year’s dates) is shown below.

Key fields on the report are numbered and their purpose is described below:

1. Identify the employees with Absence Management. Only these employees are affected by this issue. If the report produces a long list of hires, you may choose to export the report to EXCEL and sort or filter the report to identify only these employees
2. EMPL CLASS will help you determine the employee’s Annual Leave Plan. For example Classified employees receive Plan 29 Classified Staff Annual Leave. Faculty employees receive 36 New Faculty Annual Leave, and in some special cases, 11 Old Leave Plan. You will need to know the leave plan to correct the error.
3. If the employee is in a Faculty Empl Class and the Service date is prior to 1/1/2007. Further research is required to determine if the employee has the Old Faculty Annual Leave Plan (11) or New Faculty Annual Leave Plan (36). Go to the employee’s Leave Balances page to review the employee’s leave balances and determine the answer.



## Using the query shown above identify the following pieces of information:

* all New Hires from 12/25/20 – 1/10/21 who are set to be processed by Absence Management
* the Annual Leave Plan for the employee

## Navigate to the Assign Entitlements and Takes page

## Enter the EMPLID

## Click Search

##

## Add a No Accruals entry for the employee for 1/10/2021

## Click Save

*An example is shown below*

Be certain you key the date 1/10/2021. A clerical error in this field will cause unwanted results.



## Once the 1/10 New Year Calendars are complete, review the employee’s leave balances and confirm the process worked correctly

# Reload Short Term Disability and Parental Leave Balances

All STD Leave and Parental Leave balances will be eliminated as of 1/9/2021. Perform the following two processes to move the STD balances into the New Year starting on 1/9/2021.

1. **Locate employees that currently have STD Leave and Parental Leave Balances**
2. **Manually reload the STD and Parental Leave balances so they continue to be available**

### To locate employees with Short Term Disability:

1. Run the following query to Excel: VX\_AM\_CALENDAR\_GR

*See the screen image below*



1. Key your college’s 1/9 EN1 Calendar name in the prompt (note, this will not be available to run until Wednesday, Jan. 13th after 3:00 p.m., after the 1/9 calendars are finalized)



1. In Excel, Click cell D2 to select the LEAVE column.
2. Click Data in the Menu bar
3. Click the Z-to-A sort feature or use a filter to find all STD and Parental Leave Balances

*See the Screen Image below*



To reload Short Term Disability balances, use the Adjust Absence Page

1. Go to the **Adjust Absence** page
2. Key in the employee’s ID
3. Key in the 1/9 EC1 calendar name – remember, calendar names include the employee pay group number. For example, a 074 pay group employee will be in the 074210110EC1 calendar.
4. Click Search



1. On the Adjust Absence Balance page, select **Plan 66STDLV or 73PARENT**
2. Key the hours of STD or Parental Leave
3. Click Save.

### Also to note, Executive Staff moving to 15 years of service (Leave Plans 04, 05, 08, and 09)

### HRMS will automatically provide the proper new leave plan, but it does not move the balance from the old leave plan.

# Overview of Leave Balance Adjustments in the 12/25 – 1/10 time frame

*The above steps should resolve any leave issues for 12/25 – 1/10. However the following information is provided if other leave adjustments are needed.*

Use the **Adjust Absences** page to make any necessary adjustments. The following information will help you recognize the proper calendar to use to associate the adjustment:

|  |  |  |
| --- | --- | --- |
| Leave Type | Adjustment Calendar | Leave Plans |
| Semi-Monthly Accrued Leave Plans | Adjust leave balances using the 1/10 EC1 Calendar | 11: Old Faculty Annual Leave Plan29: Classified Staff Annual Leave Plan31: Traditional Sick Leave36: New Faculty Annual Leave Plan |
| Excess Leave Plans | Adjust leave balances using the 1/10 EX1 Calendar | 37: Excess Leave for Old Annual Leave Plan 11 with VSDP Sick28: Excess Leave for Old Annual Leave Plan 11 with Traditional Sick61: Excess Leave for Classified Staff64: Excess Leave for Executive Annual Leave Plan 0533: Excess Leave for Executive Annual Leave Plan 0834: Excess Leave for Executive Annual Leave Plan 0435: Excess Leave for Executive Annual Leave Plan 0948: Excess Leave for New Admin/Faculty Leave Plan 36 |
| Annual Accrued Leaves | Adjust leave balances using the 1/10 EC1 Calendar | 01: 9-Month Faculty Sick Leave03: Volunteer Services06: VSDP Sick07: VSDP Family04: Executive Leave05: Executive Leave08: Executive Leave09: Executive Leave |
| Special Purpose Leave Plans | Adjust leave balances using the 1/9 EN1 Calendar.  | 50: Bonus51: Comp Leave52: Military Leave54: Civil and Work Related Leave55: Overtime Leave56: Recognition & Retention57: Organ Donor Leave60: Disability Credits63: Education Leave68: Workers Comp Leave69: Other Leave |