Academic Vacation and Sick Leave Maintenance Instructions

University and System Human Resources

Spring 2020

When should I work on this?

- University of Illinois System requires viewing and updating academic employee leave information between August 16, 2019 and May 15, 2020 for the spring reporting period.

- It is **critical** that units complete the first leave reporting no later than June 6, 2020 for all academic employees.

- Go to the HR Reporting Portal to access a report of employee leave balances for those that you need to report usage in your organization.
  (https://hrnet.uihr.uillinois.edu/uhr/HRSystems/ReportingPortal/HRReports/PealeavBalance/PealeavBalanceform.cfm)
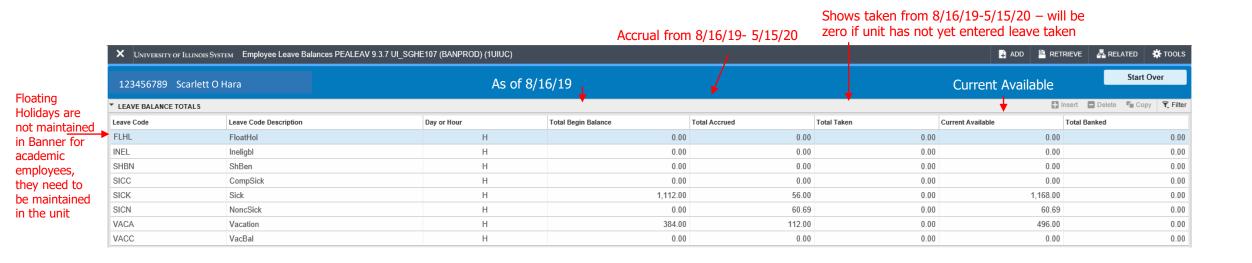
Reporting Usage for Exempt Employees

- Academic employees who are not eligible for overtime should be reporting absences in half- and full-day increments only (except when leave is taken under the Family and Medical Leave Act).

- Absences in increments less than half- or full-days should not be charged (applied against leave "taken") against vacation or sick leave balances, **unless FMLA**.

- Full-time Academic employees are paid on an 8-hour day.

- Part-time and alternative schedule employees report absences as appropriate based on their schedule. Generally speaking, the employee reports either half-day or a full-day based on their scheduled hours for the day.

After collecting the employee's leave "taken", you will use Banner

- An on-line calculator is available on the System HR website which will assist you in verifying accruals needed for Spring 2020 reporting https://www.hr.uillinois.edu/cms/One.aspx?portalId=4292&pageId=5601

- Banner – leave balance, accrual and taken information is found on the PEALEAV form
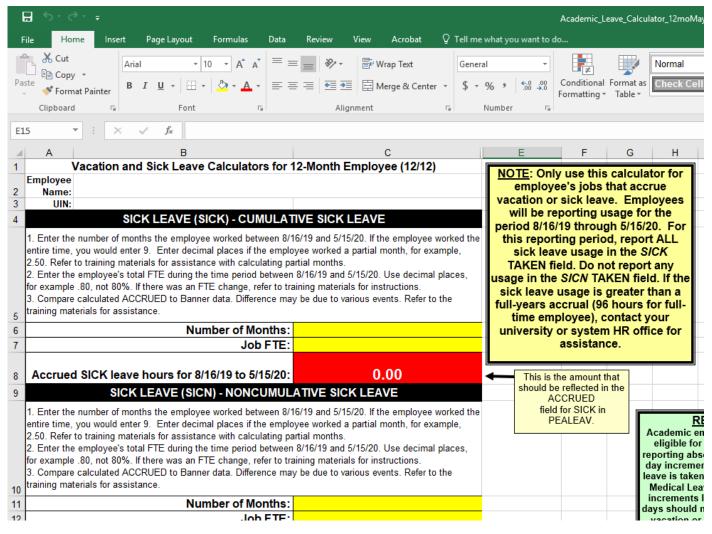
Step 1—View Employee Leave Balance Information in Banner

- From main Banner menu, type PEALEAV, press Enter
- Type the employee UIN, Next Block
- View Employee Leave Balance summary screen (shown below)

Shows taken from 8/16/19-5/15/20 – will be zero if unit has not yet entered leave taken

Accrual from 8/16/19- 5/15/20

Floating Holidays are not maintained in Banner for academic employees, they need to be maintained in the unit

| UNIVERSITY OF ILLINOIS SYSTEM Employee Leave Balances PEALEAV 9.3.7 UI_SGHE107 (BANPROD) (1UIUC) | | ADD | RETRIEVE | RELATED | TOOLS |

123456789   Scarlett O Hara   As of 8/16/19   Current Available   Start Over

▼ LEAVE BALANCE TOTALS   Insert Delete Copy Filter

Leave Code	Leave Code Description	Day or Hour	Total Begin Balance	Total Accrued	Total Taken	Current Available	Total Banked
FLHL	FloatHol	H	0.00	0.00	0.00	0.00	0.00
INEL	Ineligbl	H	0.00	0.00	0.00	0.00	0.00
SHBN	ShBen	H	0.00	0.00	0.00	0.00	0.00
SICC	CompSick	H	0.00	0.00	0.00	0.00	0.00
SICK	Sick	H	1,112.00	56.00	0.00	1,168.00	0.00
SICN	NoncSick	H	0.00	60.69	0.00	60.69	0.00
VACA	Vacation	H	384.00	112.00	0.00	496.00	0.00
VACC	VacBal	H	0.00	0.00	0.00	0.00	0.00

- No changes are made on this screen (made in the next block of PEALEAV, covered on slide 7)
- If there are multiple leave eligible jobs, this is the total leave information for all jobs

Step 2—Use the Excel Calculator to compute accruals and verify balance information

- With the on-line calculator you will be able to easily calculate accruals and verify Banner PEALEAV information. The calculator shown to the left is for a 12 month employee. There are separate calculators available for 9 month and 12 month employees.

- You may save calculations for an individual.

- To download the Excel calculator to your desktop, select File, Save As, in your web browser menu bar. You may then save the calculator to your desktop / personal folder.

Link to on-line calculators: https://www.hr.uillinois.edu/cms/One.aspx?portalId=4292&pageId=5601

Step 3: View and/or Edit Job Leave Balances

1. From the Employee summary screen, Next Block. View Job Leave Balances is the next screen.
2. Click on the job number to be viewed or maintained.
3. If Begin Balance or Accrued are not correct, click on the field to be edited and overwrite with the correct number. Accrued is total from 8/16/19 through 05/15/20.
4. In the Taken field, enter the total hours taken from 8/16/19 through 05/15/20.
5. Date Available field should be 05/15/20.
6. Enter Change Reason "Maintaining leave balances 08/16/2019 through 05/15/2020".
7. Save.

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EMPLOYEE LEAVE BALANCES

Position	Suffix	Title	Begin Date	End Date	COA	Time Sheet Organization	Time Sheet Organization Description	Leave
UA1166	02	ASST DIR HR AND FIN MGMT	12/16/2018	12/15/2019	9	904000	System Human Resource Services	Y3
UB0810	00	ASST DIR HR AND FIN MGMT	02/16/2015	08/15/2016	9	699008	AITS ITPC	IN
U22550	CE	STIPEND INTERNET CELL (LU)	03/16/2014	08/15/2018	9	904000	System Human Resource Services	Y3
UA1166	01	ASST DIR HR AND FIN MGMT	07/16/2011	08/15/2011	9	212000	UA Employee Relations and HR	IN
UA1166	00	ASST DIR HR AND FIN MGMT	12/16/2009		9	904000	System Human Resource Services	Y3
U22497	00	PROJECT COORDINATOR	07/28/2008	12/15/2009	9	212000	UA Employee Relations and HR	Y3
U22152	00	PROJECT SPEC	10/16/2006	07/27/2008	9	212000	UA Employee Relations and HR	Y3
U22115	00	ACADEMIC HOURLY	04/17/2006	10/15/2006	9	212000	UA Employee Relations and HR	IN
U85239	00	AC HOURLY	12/21/2003	08/15/2005	9	904000	System Human Resource Services	IN

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DETAILS

Leave Code *	Leave Code Description	Date Available *	Begin Balance Hours *	Accrued Hours *	Taken Hours *	Current Available Hours	Change Reason	Maximum Amount Hours	Banked Hour
FLHL	FloatHol	09/25/2003	0.00	0.00	0.00	0.00	PZPUPDT program updated hours accrued, tak...	0.00	
SHBN	ShBen	08/15/2018	0.00	0.00	0.00	0.00	PZPUPDT-Sum of rolled hours updated this job ...	9,999.99	
SICC	CompSick	08/15/2018	0.00	0.00	0.00	0.00	PZPUPDT-Sum of rolled hours updated this job ...	9,999.99	
SICK	Sick	08/15/2018	1,112.00	56.00	0.00	1,168.00	PZPUPDT program updated hours accrued, tak...	9,999.99	
SICN	NoncSick	08/15/2018	0.00	60.69	0.00	60.69	PZPUPDT program updated hours accrued, tak...	104.04	
VACA	Vacation	08/15/2018	384.00	112.00	0.00	496.00	PZPUPDT program updated hours accrued, tak...	576.00	
VACC	VacBal	08/15/2018	0.00	0.00	0.00	0.00	PZPUPDT-Sum of rolled hours updated this job ...	9,999.00	

Donations to the Shared Benefits Pool should be included in the amount reported as Taken by that individual in the SICK or VACA leave category. At UIC, this has already been entered by university HR. If an employee was a recipient of leave from the Shared Benefits Pool:
- hours received should be shown in the Beginning Balance field of SHBN (entered by university HR),
- taken should be reported in the Taken field of SHBN.

Step 4—Verify Employee Leave Balance Information after Editing Job Information

Leave Code	**Leave Code Description**	**Day or Hour**	**Total Begin Balance**	**Total Accrued**	**Total Taken**	**Current Available**	**Total Banked**
FLHL	FloatHol	H	0.00	0.00	0.00	0.00	0.00
SHBN	ShBen	H	0.00	0.00	0.00	0.00	0.00
SICC	CompSick	H	0.00	0.00	0.00	0.00	0.00
SICK	Sick	H	344.00	56.00	56.00	344.00	0.00
SICN	NoncSick	H	0.00	60.69	24.00	36.69	0.00
VACA	Vacation	H	248.00	112.00	64.00	296.00	0.00
VACC	VacBal	H	0.00	0.00	0.00	0.00	0.00

Employee Leave Balances PEALEAV 9.3.7 UI_SGHE107 (BANPROD) (1UIUC)

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LEAVE BALANCE TOTALS

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1. From the Job Leave Balances screen, Rollback to return to the summary screen
2. Next Block to view the Leave Balance Totals and verify your changes
   a. Beginning Balance for 8/16/19
   b. Total Accrued to date for this academic year since 8/16/19
   c. Total Taken reported to date
   d. Current Available

If there are multiple leave-eligible jobs, this is the total information for all jobs.

Reporting for 9 Month Employees

- Between 8/16 and 5/15, 9 month employees accrue all of their leave and use any leave. As a result, reporting in May for 9-month employees completes leave maintenance for the year
- According to policy, sick leave is used in this order:
- first use cumulative SICK Accrual from this academic year (96 hours/12 days),
- then non-cumulative SICN Accrual (104.04 hours/13 days),
- and finally, Begin Balance in SICK

NOTE: hours accrued above reflect an employee who is appointed full-time for a full academic year.

Example of SICK and SICN usage
for 9 month employee

- A full time 9 month employee had a beginning balance of 100 hours of cumulative sick leave (SICK) and accrued all of their sick leave and reports all used sick leave for the period 8/16 to 5/15.
- The employee accrued 96 hours (12 days) of cumulative sick leave and 104.04 hours (13 days) of non-cumulative sick leave (SICN).
- The employee reported to the unit that they had used 240 hours of sick leave.

	Beginning Balance	Accrued	Current Available
SICK	100	96	196
SICN	0	104.04	104.04

Total sick leave used = 240 hours

Example of SICK and SICN usage for 9 month employee, cont.

First use current year SICK Accrual (96 hours/12 days)   96 hours

Then current year SICN Accrual (104.04 hours/13 days)   104.04 hours

And finally, use part of the balance from SICK   39.96 hours

Total used   240 hours

How to report this sick leave in Banner:

SICK Taken (96 + 39.96)   135.96

SICN Taken   104.04

Total Taken reported   240

How do I report when the employee has more than one leave eligible job?

- Report all taken amounts on Primary job
- This may result in a negative Current Available on that job. When you review the Summary information you should see the accurate total employee information.

Note:

- The Annual Vacation and Sick Leave Roll performed within the MN9 pay period places the total Beginning Balance for the employee on the Primary Job
- You will want to verify that accruals occurred correctly for all job(s) at that time.

What transactions may affect leave balances and accruals?

- Pay adjustments
- Employee Class change
- Leaves of Absence

Leave maintenance needed due to pay adjustments

- If your employee had a pay adjustment for regular pay (i.e. missed the deadline for calc for a new hire), leave accruals will not have occurred. Units can use the Pay History Leave Accruals form (PHIACCR) to verify whether or not the leave accrual occurred for a particular pay period.

- You will need to use the On-line Excel Calculator to determine the total accrual and then you will overwrite the Accrued in Banner.
  - Enter the number of months the person worked in the job – for a partial month use days worked/work days (See Payroll Schedule for official work days in each month)
  - Enter the employee's total FTE for those months
  - The accrual to be entered into PEALEAV will be calculated for you.

Leave maintenance needed due to employee class change

- If an employee moves from one employee class to another, the leave information needs to be verified for accuracy.

- Example: Your employee moved from Civil Service (with a balance of 200 hours on a 37.5 hour workweek) to Academic Professional. As a part of that move, the balances would have been converted to days and then the new beginning balance in hours based on an 8 hour work day. In this example, 200/7.5x8=213. The new beginning balance should be 213 hours of leave.

Central HR will have
    a) ensured the final balances for vacation and sick leave were correct for the Civil Service job
    b) zeroed out the Civil Service information
    c) converted final balances to new workweek if necessary
    d) entered current available as the Beginning Balance for the academic job for all eligible leave codes

Leave maintenance needed due to Leave of Absence

- To verify accruals are correct, the Leave Balance History (PEILHIS) form or the Pay History Leave Accruals form (PHIACCR) can be used to see if accruals have occurred correctly during the time period of the leave. If accruals have incorrectly occurred, adjustments to Accrued are necessary.
    - Unpaid Leave (should not accrue any leave benefits)
    - Partial Paid Leave (should only accrue leave benefits for the appointment percentage they are being paid)
- Excel Calculator can be used to determine what should have accrued. For example, a) determine # of months on full accruals, b) determine # of months with no accrual or partial accrual, c) add together for total correct accrual
- Overwrite with the correct accrual amount in the Accrued field.

Important notes on maintaining leave balances

Do not access or maintain balances when the payroll calc is being performed.

Payroll "calc" begins at 5pm on the published date and is finished when the pay disposition is at 70. (Pay dispositions can be viewed on PZILIST.)

University
and
System Human Resource Services
Contact Information

https://www.hr.uillinois.edu/contacts