Micro Learning:
Leave Transactions
10/11/22

Review Key Terms

Start Date	Date the employee leave begins = Effective Date of Leave in Job Data.
Expected Return Date	Date the employee is expected to return from leave.
Expected Job End Date	If job has an end date, the last day the employee is expected to work. Visible on Job Data.
Last Date Worked	The last date the employee physically worked before going on leave.
Actual Return Date	Date the employee returns to work from leave, absence request is edited with actual return date.
FMLA/CFRA/PDLL	The Federal and State statutes that protect an employee's job while on leave. FMLA = Family Medical Leave Act; CFRA = California Family Rights Act; PDLL = Pregnancy Disability Leave Law.
Pay Period Dates for Academics	The quarter pay period dates associated with an academic leave.
Workflow Status	Identifies the current standing of the absence request related to the processing workflow.
Action/Action Reason Codes	Action Code defines "What" and Reason Code defines "Why". For Extended Leaves of Absence these codes are entered by UCPC upon approval of leave.
Extended Leave Monitoring Report	Report that identifies all employees that are on extended leaves, accessed through Cognos reports.
SHC	Serious Health Condition.
Absence Management (AM)	A module in UCPath that Leave Initiators & Approvers use to plan and manage absence events (including extended leaves) and to calculate vacation and sick time.

Review Key Terms

Absence Takes	The number of units (hours) an employee takes in association with an absence.
Extended Absence (EA) Request	Transaction Request to place employee on a Paid/Unpaid Leave of Absence.
Leave with Pay	Leave in which the employee continues to get paid and maintains existing benefits. The employee's pay status will change to Paid Leave of Absence to ensure the employee continues to get paid and receive benefits accordingly.
Leave without Pay	Leave in which the employee does not continue to get paid and benefits are discontinued unless the employee elects to maintain benefits by paying applicable monthly premiums through the Direct Billing process. The employee's payroll status will change to Unpaid Leave of Absence to ensure the employee is no longer paid.
Intermittent Leave/ Reduced Schedule	Paid or unpaid Leave for an intermittent date range or at a reduced work schedule. For example, an employee uses medical leave for physical therapy twice a month.
Return from Leave (RFL)	When employee physically returns to work after a Leave of Absence, the actual return date is entered on the EA Transaction and the Return from Leave (RFL) is added to Job Data changing payroll status to Active.
Leave Administrator	The role provisioning required to initiate and approve transactions in this training.
Pay for Family Care and Bonding (PFCB)	A pay option for a qualifying leave under the FMLA and/or CFRA

Pre Process

Complete all documents and approvals required outside of UCPath system **BEFORE** entering in UCPath

Review employee's current leave balance on the **Admin-Review Absence Balance** page

Review employee's current elections on the **Benefits Summary** page

Review **Expected Job End Date**

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- For policy guidance contact Employee Relations or HRLOA

- Print/download the Benefit Summary and Benefit Election Form for employees taking an unpaid leave of absence
- Check the Election Form Provided to EE box when forms have been provided

- Before submitting a leave ensure the Expected Return Date is not beyond the Expected Job End Date

Key Fields

1 ## Dates

- Last Date Worked should be one day or more to the start of the leave
- Last Date Worked should be the same on all continuous leave if the employee has not returned
- No gaps on the leave dates between continuous leaves
- Enter Actual Return Date if the employee has returned (Expected Return Date and Actual Return Date should match)
- Expected Return Date/Actual Return Date cannot be past the Expected Job End Date

2 ## Leave and FMLA/CFRA/PDLL Drop Down

- The Leave options that appear are dependent on the Eligibility Group assigned to the employee
- Review **Job Aid: Extended Absence Request Leaves and Description** to read a description of each leave type in the list
- The FMLA/CFRA/PDLL field is needed only when the leave is specific to FMLA, CFRA or PDLL

3 ## Paid/Unpaid Options

- There are three options for the Paid/Unpaid field
- When the leave changes from one paid status to another, a new absence request is required
- An Actual Return Date is required when going from Unpaid to Intermittent and PFCB to Intermittent

4 ## Job Overrides Tab

- Use if employee record should be excluded from leave, make sure to enter that employee record number under the Exclude Jobs section on the Job Overrides tab
- **Job Aid: How to Use Job Override to Limit Jobs Put on Leave Status**

5 ## JED Additional Earnings Code Tab

- If WC ESL, make sure JED codes ESL and WCN are entered in the leave under the WC tab
- If Partial Sabbatical, make sure JED codes are entered on the leave under the Sabbatical tab

6 ## Notes

- Notes are required for any requested or edited Leave of Absence Request
- Notes provide Leave Initiators, Approvers and UCPC, history of the Leave of Absence Request
- UCPC relies on notes for guidance in processing the absence request in employee's Job Data

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Next Steps

1 Leave transactions must be locally approved by the **Employee Data Change Deadline** in order to be processed with the current payroll

2 UCPC will use the leave request to update **Job Data**. After UCPC processes the leave, review Job Data to make sure it looks correct, especially if changes to JED were required

3 **Cancelling** a leave is only possible once a leave is approved by UCPC
- If an employee retroactively cancels a leave without pay or partial pay sabbatical, you must submit a ticket to UCPC to ensure that the Job Earnings Distribution (JED) leave components are removed
- A new Leave of Absence request must be initiated if the transaction is canceled by UCPC, denied, or when the leave type changes
    - Leave type cannot be edited except in the case of changing from Workers Comp leave to Medical Leave

4 To **Return** an employee from a leave refer to UPK: Return from Leave of Absence
- When returning an employee from a Leave of Absence, best practice is to edit Expected Return Date to match the Actual Return Date

Workflow Status

Workflow Status	Description
Saved	Saved for later processing by Leave Initiator but not submitted for approval.
Submitted	Submitted by Leave Initiator and awaiting first Location Approver processing. First Approver can edit and approve in this status.
Apprvl Prc	If Location has one Approver: Approved by Location Approver and awaiting WFA Production Approver processing. If Location has two Approvers: Approved by first Location Approver and awaiting second Location Approver processing.
Approved	Processed and approved by UCPC WFA Production. The Leave Initiator can edit or cancel leaves in this status.
Sub Cancel	Cancel submitted by Leave Initiator and awaiting first Approver processing.
App Cancel	If Location has one Approver: Cancel approved by Location Approver and awaiting WFA Production Approver processing. If Location has two Approvers: Cancel approved by first Location Approver and awaiting second Location Approver processing.
Cancelled	Cancel processed and approved by UCPC WFA Production.
PushBack	Pushed back from Approver 2 or 3 to previous Approver.
Denied	Denied by any Approver.

Local Resources

UC San Diego Job Aids and Quick References

- **How to Request a Leave of Absence**
- **How to Request Sabbatical Leaves**
- **How to Use Job Override to Limit Jobs Put on Leave Status**

UC San Diego Business Analytics Hub

- Extended Leave Monitoring Report
- FMLA Eligibility and Leave Documentation
- Leave Action Report
- Leave Balance Summary Report
- Sabbatical Balances Report
- Who's on Sabbatical Report

UCPath Center Resources

UCPath Help Site for Transactional Users
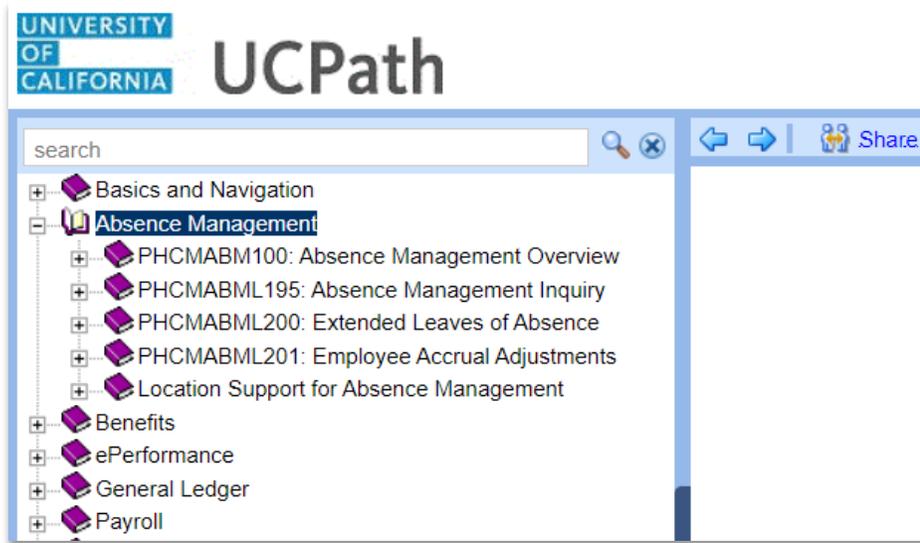
- **Job Aid: Pay for Family Care and Bonding (PFCB)**
- **Job Aid: Pay for Family Care and Bonding Unit 18 (PFCB)**

- Job Aid: Extended Absence Request Leaves and Description
- Submit Medical Leave of Absence Request
- Submit Multi-Row Leave of Absence Request
- Extend Existing Leave of Absence
- Extend Leave of Absence with New Leave Type
- Cancel an Approved Leave of Absence
- Return from Leave of Absence
- Review Leave Monitoring Report
- View Manage Accruals
- View Benefits Summary
- View Extended Absence Trans History Component
- View Employee Absence Balance Data
- View Career and Benefits Elig Hrs INQ
- Job Aid: Career & Benefits Elig Hrs INQ Page for Locations
- Job Aid: Earn Code to Absence Mapping
- Job Aid: Earnings Code Configuration
- Submit Workers' Compensation Leave of Absence Request
- Submit Full Sabbatical Leave of Absence Request
- Submit Partial Sabbatical Leave of Absence Request
- Job Aid: Partial Sabbaticals – UCPC Impacts