

General Leave Processing

| | |
|---|--|
| Who initiates the leave process? What approvals and supporting documentation are needed and by whom? | Typically the employee and the unit initiate the leave process. The employee must submit the appropriate leave application to their supervisor for approval. Supporting documentation varies by the type of leave. |
| Is the Unit responsible for tracking leave or does Central HR do this? | Home units complete the PEAFMLA (if an eligible FMLA leave) and PZAELOA Banner forms to track the leave. If the leave is a partial-pay or unpaid, the home unit initiates a PITR or other required forms of documentation for that unit/campus and routes it to any other units that hold a job from which the employee is also taking partial pay or unpaid leave. The home unit then forwards the PITR or form to Central HR or the appropriate service center, who enters the information on NBAJOBS. |
| What happens if the leave tracking form isn't kept updated when employees go on and return from leave? | Leave tracking is an important part of making sure employees receive their leave benefits. It's also important in managing the interaction between leave and other employment benefits, e.g., tenure, and seniority. Missing or out-dated information may result in the incorrect calculation of benefits that are affected by leave. |
| What are valid leave categories? | The listing of valid leave categories can be found at https://nessie.uihr.uillinois.edu/pdf/Banner/JobAid_LeaveCat.pdf . |
| Can an employee go on a partial leave from a job? Can an employee go on a full or partial leave from one job but not from another? | Yes, an employee can go on partial leave from a job. Employees with more than one job can take partial or full leave from one job but not from another. |
| How are default earnings codes determined for full and partial leaves? | For monthly and exempt CS employees going on partial-pay leave, the default earnings codes on the NBAJOBS record (Default Earnings window) will be overridden/updated by the Central HR person entering the leave record into NBAJOBS. For monthly and exempt CS employees going on full leave (unpaid), the Status on the NBAJOBS record will be changed to "Leave w/o Pay, w/o Ben" and this will stop all default earnings. |
| Which Leaves of Absence need to be processed and tracked under LOA processing requirements, e.g., Vacation and Sick Leave vs. Military leaves, Educational leaves? | The following leaves are processed and tracked under LOA requirements: Administrative leave, Medical leave, SURS disability leave, Chancellor's leave, Military leave, FMLA leave, VESSA leave, Partial SURS disability leave, Educational leave, Personal leave, and Worker's Compensation leave. Vacation and sick leave are tracked in time reporting or AVSL reporting, unless vacation and/or sick leave is used in conjunction with leaves requiring LOA tracking, such as FMLA or disability. |
| How does processing and tracking leaves differ between monthly paid and bi-weekly paid employees? | There are differences for tracking leaves for monthly and bi-weekly employees. Additionally, there may be differences between campuses on the leave process by employee group. However, all Units update the PZAELOA form (the Employee Leave of Absence form) for all leaves except sabbatical and paid FMLA leaves; and the PEAFMLA form (the Employee FMLA information form) when the leave is an FMLA leave. For leave processing information for your campus, please contact your campus HR office. |

| | |
|--|---|
| <p>If a Unit initiates a LOA or a return from LOA using the Pitr, what Pitr fields need to be completed? How does this differ between unpaid, partially paid, and full paid LOAs?</p> | <p>In completing a Pitr for an LOA, it is important to:</p> <ul style="list-style-type: none"> ▪ Verify the data in the Employee Information section and make appropriate corrections. ▪ Complete the Job Information section, including the Job Appointment % to indicate the percentage of the Job FTE that the employee is working during the LOA if the leave is with partial pay/with benefits. ▪ Complete the Leave of Absence Information section. ▪ Review/verify the Family and Medical Leave section for accuracy. Submit changes to FMLA in the FMLA section under Additional Position/Job Information. ▪ Repeat steps 2 - 4 for all additional positions/jobs for which the employee is taking leave in the Additional Position/Job Information section. ▪ The process is the same for all types of leaves. However, some fields will need to be completed differently if the leave is paid, partially paid, or unpaid. |
| <p>What steps must a unit take when an employee returns from a leave of absence? How is leave-tracking information updated? How are prior service adjustments and tenure information updated?</p> | <p>To return an employee from leave, the Unit completes and submits a Pitr or other required forms of documentation for that unit/campus to HR for entry into Banner. The Leave of Absence information and Family and Medical Leave (if applicable) information is completed, as well as the PEAFACT section for sabbatical leaves. The Unit then updates the PZAELOA form and the PEAFMLA form (if appropriate) to accurately track the leave. The Campus Provost offices and the HR offices handle tenure information and prior service adjustments, respectively.</p> |
| <p>Is there any documentation that is required for employees who are going on leave?</p> | <p>Yes, documentation is required and varies by the type of leave requested. Please refer to NESSIE for information about specific types of leave: https://nessie.uhr.uillinois.edu/cf/leave/index.cfm</p> |
| <p>When do I adjust the appointment percent within Banner for an employee who has gone on leave?</p> | <p>Departments will only adjust the Job Appointment % in the Job Information section of the Pitr form when the leave taken is With Partial Pay/With Benefits. The value to enter is the % of the Job FTE the employee is working during the leave of absence. For example, if the employee is taking a 40% leave, the Job Appointment % is 60%. For all other leave types (With Pay, With Benefits; Without Pay, Without Benefits; Without Pay, With Benefits), the Job Appointment % is not adjusted.</p> |
| <p>Is it necessary to adjust the salary rate fields for an individual who is going on leave without pay or partial leave without pay?</p> | <p>Yes, for leaves with partial pay or unpaid only, units will adjust the Rate field for Civil Service or the Annual Salary field for Academic employees. Additionally, the Hours per Day field should be adjusted.</p> |
| <p>Do I need to adjust the FTE field for an employee who is going on full or partial leave?</p> | <p>No. The Job FTE field is not adjusted for an employee going on leave. The Job Appointment % is adjusted only when the leave taken is With Partial Pay/With Benefits.</p> |
| <p>What fields do I need to complete within Banner for an employee who is going on leave?</p> | <p>Units will complete fields in Banner on the PZAELOA form. These fields are:</p> <ul style="list-style-type: none"> ▪ Action Date ▪ Leave Type ▪ Leave Requested From and To ▪ Approved Leave Begin and End ▪ Expected Return Date ▪ Last Day of Work (the last day the employee actually worked) ▪ Last Day in Pay Status (the last day the employee was paid, regardless of how, e.g., sick, vacation) ▪ Actual return date ▪ Comments ▪ Commitment Fulfillment (only for educational leaves) ▪ Fulfillment due date and fulfillment date ▪ Percent of Leave ▪ Regular FTE (the FTE being held for the employee) |

FMLA Leave and Processing

| | |
|--|---|
| Which Banner forms are used to track FMLA leave? | The Employee FMLA Information form (PEAFMLA) will be used to track all relevant dates, eligibility, leave reasons, and other information related to the leave itself. Actual FMLA hours used will be tracked through the use of Earnings Codes in payroll. |
| Who enters information about FMLA leave into Banner? | The Home Department/Unit will be responsible for tracking FMLA information on the PEAFMLA form in Banner. |
| How is the FMLA year begin date determined? | The FMLA year begin date is the date of the first FMLA qualifying event in the previous 12 month period for that employee. Each employee will have their own FMLA year begin date based on their qualifying event(s). In Banner, this date defaults to the date the information is entered in PEAFMLA and will need to be changed if this is not the start of the FMLA event. |
| How is the FMLA year end date determined? | The FMLA year end date defaults in after the FMLA year begin date is entered. This date is the same day and month as the FMLA year begin date, one year later. |
| How often should information be updated in PEAFMLA? | Departments/Units should update the PEAFMLA form at the beginning and end of the FMLA leave. |
| What is the difference between the FMLA year begin and end dates and the Leave begin and end dates? | Employees may be on FMLA leave at different times during their FMLA year for different qualifying reasons. The FMLA year begin dates are based on the first qualifying event in the previous 12 month period for that employee. The leave begin and end dates are based on the current qualifying event for which the employee is on leave. The leave begin date is the first day the employee was not working and on leave. The leave end date is the last day the employee was on leave before returning to work. |
| How do I designate FMLA in payroll for Civil Service employees? | <p>The following earnings codes are used in payroll to designate a leave as FML for Civil Service employees:</p> <ul style="list-style-type: none">▪ Family Leave Vacation▪ Family Leave Vacation (rdg)▪ Family Leave Sick▪ Family Leave Sick (rdg)▪ Family Leave Unpaid▪ Family Leave Work Comp▪ Family Leave Disability▪ Family Leave Parental▪ Family Leave Parental (rdg)▪ Family Leave Holiday▪ Family Leave Holiday (rdg)▪ Family Leave Floating Holiday▪ Family Leave Floating Holiday (rdg)▪) |

| | |
|---|--|
| How do I designate FMLA in payroll for Academic Professional employees? | FMLA leave is not recorded in payroll for Academics at this time; it is only recorded on the PEAFMLA and PZAELOA forms (for unpaid and partial paid FMLA leaves) in Banner. |
| If sick leave used is charged toward FMLA for Civil Service staff, how should data be entered into the system? | When entering the sick leave or vacation time used toward FMLA, the <i>FMLA Sick</i> or <i>FMLA Vacation</i> earnings codes will be selected to designate the leave as FMLA. This is selected via earnings codes in the web time entry application or through the PHATIME Banner form for department time entry. This allows the time to be appropriately charged to the employee's vacation and/or sick leave balances. |
| What status codes are used for tracking FMLA on PEAFMLA? | Units/Departments may indicate the status of an FMLA leave using one of the following: <ul style="list-style-type: none"> ▪ Requested - the employee has requested to take FMLA leave and has completed the appropriate paperwork. ▪ Pending Approval - the unit designee is in the process of reviewing the FMLA paperwork to determine approval or denial. ▪ Approved - the FMLA leave has been approved by the unit designee. ▪ Denied - the FMLA leave has been denied by the unit designee because it is not an eligible FMLA qualifying event, the employee has exhausted his/her 12-week FMLA entitlement for that FMLA year, or the employee is not eligible for FMLA based on eligibility requirements. |
| What is the status date field on the PEAFMLA form? | The status date should be the same as the leave begin date. |
| How do you designate a partial FML? | On the second block of the PEAFMLA form, there is a field for the unit to complete titled <i>Actual Back to Work Info</i> . If the employee is on partial FMLA leave, the unit will check the part-time status in this field. |
| How does intermittent leave work for FMLA leave? | Intermittent leave is leave that is taken in separate blocks of time for a single qualifying event. The intermittent leave must be medically necessary, can be planned or unplanned, and the shortest leave increment is the shortest period of time designated in the payroll system. |
| How do you designate intermittent FMLA leave? | To designate an FML as intermittent, do not complete the Scheduled Back to Work Date field and the Percent of Leave field on PEAFMLA. Leave these fields blank. |
| What are the events that qualify as an approved FMLA leave? | <ul style="list-style-type: none"> ▪ Birth/Adoption/Foster Care of a Child ▪ Serious Health Condition of a Child, Parent, or Spouse ▪ Personal Serious Health Condition ▪ Qualifying exigency of a covered servicemember (child, spouse, or parent) ▪ Care of a covered servicemember with a serious injury or illness |
| What constitutes a “serious health condition”? | A serious health condition is an illness, injury, impairment or physical or mental condition that involves inpatient care or continuing treatment by a health care provider and that results in a period of incapacity. |
| Who is considered a “health care provider”? | A health care provider may be any of the following: <ul style="list-style-type: none"> ▪ Doctors of medicine or osteopathy ▪ Podiatrists, dentists, clinical psychologist, optometrists and chiropractors ▪ Nurse practitioners, nurse-midwives, clinical social workers, and physician assistants ▪ Christian Science practitioners ▪ Any healthcare provider recognized by the University or State health plan |

| | |
|--|---|
| What is a “period of incapacity”? | <p>A period of incapacity may be:</p> <ul style="list-style-type: none"> ▪ Hospital stay that involves any overnight stay in a hospital, hospice, or residential medical care facility and subsequent treatment in connection with such inpatient care. ▪ More than three (3) consecutive full calendar days that also includes treatment two or more times by or under the supervision of a health care provider (i.e. in-person visits, the first within 7 days and both within 30 days of the first day of incapacity) or includes one treatment by a health care provider (i.e. an in-person visit within 7 days of the first day of incapacity) with a continuing regimen of treatment (e.g., prescription medication, physical therapy). ▪ Any period of incapacity for pregnancy and parental care, chronic serious health conditions, conditions requiring multiple treatments, and permanent/long term conditions. |
| When may a unit ask for recertification to continue FMLA leave? | <p>An employing unit may require an employee to obtain subsequent recertifications as often as every six months. In certain circumstances, recertification may be requested more often. Contact your campus HR office for assistance.</p> |
| Which types of paid leaves can be used to continue in pay status while on FMLA leave? | <p>In order to continue in pay status while on FMLA leave, employees may use the following:</p> <ul style="list-style-type: none"> ▪ Vacation Leave ▪ Sick Leave ▪ Parental Leave (for birth or adoption) ▪ Holiday ▪ Floating Holiday |
| May the employer designate a leave as FMLA leave? | <p>Yes, if the employer has reason to believe that an absence may be due to an FMLA qualifying reason, the employer may designate the leave as FMLA leave. Before doing so, the unit should consult with the campus HR office to ensure proper designation and compliance with the law.</p> |
| If an employee is on disability, is this counted toward the 12-week FMLA entitlement? | <p>Yes, when an employee files for disability, the unit should immediately designate the absence as FMLA leave.</p> |
| If an employee is on parental leave, is this counted toward the 12-week FMLA entitlement? | <p>Yes, when an employee requests parental leave, the unit should designate the absence as FMLA leave. Parental leave is requested via the FMLA application, if the employee is eligible for FMLA.</p> |
| Who has the authority to approve or deny an FMLA leave? | <p>The Unit designee (typically the supervisor or manager) has the authority to approve or deny an FMLA leave. Assistance is sought from the central HR offices when needed.</p> |
| How is approval or denial of an FMLA leave reflected in Banner? | <p>Approval or denial is indicated on the first block of the PEAFMLA form under Status/Reason Information.</p> |