ASE and GSR Technical Leave Reporting Guidance

UC RIVERSIDE Academic Personnel Office

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PURPOSE, DISTRIBUTION, AND SCOPE

This document serves to provide technical guidance to departmental AP Staff, TARS TAA Administrators, Leave Coordinators and Shared services centers for Academic Student Employees (ASEs) and Graduate Student Researchers (GSRs) leave reporting. This guidance document should not be posted or shared with a broad audience (e.g., do not send to your ASE or GSR employees). This guidance is not meant to replace or contradict the language that is contained in the CBA or applicable University policy and is not a substitute for reviewing contract articles carefully. This guidance will be interpreted as consistent with the CBA and, in the event of a conflict, the language of the CBA or applicable policy will control.

This document may be amended to reflect changing operational needs, amendments to the CBA, and feedback from university administrators.

PROCESS

GSRs and ASEs are required to complete the Leave-Reporting Form for each active job and for each pay period in TARS. Below are further instructions to record the leave in UCPath.

LEAVES WITH PAY

Personal Time Off (PTO) – *GSRs only*

Allotments in UCPath

- PTO allotments will not be available in UCPath for the duration of the contract. PTO allotments should not be entered into UCPath. Refer to the GSR's Written Notice of Appointment for the number of days the GSR is entitled to at the commencement of their appointment(s). Changes to the appointment may result in a revision to the number of PTO days the GSR is entitled to.

Recording PTO in TARS

- GSRs will report their PTO in TARS as PTO usage. Due to the PTO allotments not available in UCPath, TARS will not reflect the PTO allotment balance. The GSR should report their PTO day(s) as the hours they were scheduled to work in any given day, regardless of FTE. In TARS, the PTO usage will prorate based on their appointment's percentage.
    - **Example: A 50% GSR who has a 20-hour work week and will take 1 day of PTO on Monday. In TARS, the take will reflect as 1 day of PTO, 8 hours*.50 FTE =4 hours prorated. However, the PTO taken still equates to 1 day.**
- The GSR should not report any PTO hours for the day if:
    - They worked a partial day.
    - They were not normally scheduled to work on that day.

Calculating GSR PTO Days

Fiscal Year GSRs PTO/Max Allotment Per Quarter

Contract Policy:

• PTO shall be up to twelve (12) workdays for a full twelve-month period. For shorter appointments, the twelve (12) workdays will be prorated to one day per month for every full month of appointed service.
• Appointments less than 25% FTE do not receive PTO allotment

Common Scenario Examples:
• GSR for 12 full months with 25% or more appointment: 12 days
• GSR for 3 full months with 25% or more appointment: 3 days
• GSR for 5 full months with 25% or more appointment: 5 days

Quarter	Payroll Period	TARS Takes is by Day= 8 hours
Summer Term	7/1/23-07/31/23	1 Day
	8/1/23-08/30/23	1 Day
	9/1/23-9/30/23	1 Day
1st Qtr 2023	10/1/23-10/31/23	1 Day
	11/1/30-11/30/23	1 Day
	12/1/23-12/31/23	1 Day
2nd Qtr 2024	1/1/24-1/31/24	1 Day
	2/1/24-2/28/24	1 Day
	3/1/24-3/30/24	1 Day
3rd Qtr 2024	4/1/24-4/30/24	1 Day
	5/1/24-5/31/24	1 Day
	6/1/24-6/30/24	1 Day

- **Less common scenarios:**

  • GSR receives two appointments:
    - Appointment 1 is for 8/1 – 12/31, but at less than 25% FTE. This appointment alone earns no PTO.
    - Appointment 2 is for 10/1-11/1, and the FTE together with Appointment 1 brings them up to eligibility for PTO.
    - Therefore, for the month of October, they are eligible to receive 1 day of PTO. Ideally, the appointment letter for Appointment #2 should reflect the PTO eligibility.

- GSR receives an extension on their appointment:
  - Appointment is for 1/1 – 5/31, which is eligible for 5 days of PTO.
  - Then, the appointment end date is extended for another full month to 6/30. The appointment letter should be revised with the new end date and the PTO eligibility updated to reflect the additional 1 day earned for June.

- **Other Scenarios to Note:**

- Short Work Break
  - GSR is appointed at 50% for Fall quarter and earns 3 days of PTO (1 day for each full month between October - December).
  - The unit puts the GSR job on SWB for the Winter quarter, either due to no job, or working as a TA. PTO allotment is zeroed out at the end of Fall quarter.
  - In Spring quarter, the graduate student returns as a 50% GSR for 3 full months. The PTO allotment resets to 3 days (1 day for each full month between April - June). No PTO carries over from the Fall term.

- Unexpected Change in Title
  - GSR is appointed at 50% for 12 full months starting 7/1 and given an appointment letter with 12 days of eligible PTO.
  - Unexpectedly, but mutually agreed upon, the department assigns them as a TA for Fall quarter only. The GSR appointment letter is revised to end at the start of Fall quarter, and PTO count is retroactively revised down as soon as the change is known.
    - **HOWEVER** – If the GSR used up to 12 days of PTO during the first few months prior to Fall term under the old terms of the original appointment letter, this is allowed, and their time should not be taken back.
  - They return to being a GSR starting 1/1 through 6/30 and receive a *new* appointment letter, indicating 6 days of PTO in accordance with the appointment length.

Tracking of PTO Days

Even though TARS prorates PTO usage as hours, departments should count each occurrence of PTO time as a full PTO day regardless of the number of hours reported. Any communication regarding PTO taken or remaining balances should be communicated in days, not hours. As a reminder, UCPath and TARS will not have the PTO allotment balance information available and will need to be manually monitored by the department.

PTO Usage to UCPath

- Allow approved PTO usage to be reflected on the GSR's TARs timesheet submitted for each payroll period.
- Allow approved PTO usage to be reflected on the GSR's pay stub.
- Hide PTO balances from the GSR on their UCPath dashboard
- The PTO allotment and takes will not be reflected in the Absence Management module.
- The PTO-GSR earn code does not add to gross, PTO hours submitted to UCPath cannot be sent to the general ledger.

Usage of PTO Over the Eligible Allotment

The usage of PTO requires advance approval by the supervisor or department. Approvers should ensure that the GSR has not exhausted their PTO days and has enough PTO days to cover the request prior to granting approval.

GSRs who were subject to an appointment revision that subsequently reduces their PTO allotment will not have any day(s) spent over their new allotment taken back. Instead, the GSR will have their balance set to zero (0) for the remainder of the appointment.

For GSRs that no longer have PTO days available and have requested a leave, this leave should be treated as an unpaid leave of absence.

Short Term Leave (as defined in the BX and BR contracts)

- GSRs and salaried ASEs with a 50% appointment shall be eligible for up to two (2) days of paid leave for quarter campuses. The amount of paid leave will be prorated for appointments other than 50% FTE.
- When hourly ASEs take Short Term Leave, it shall be unpaid.
- Short Term Leave should be entered using Extended Absence in UCPath. These leaves include:
  - Personal illness or disability
  - Care of a family member, or birth or adoption of a child
  - Family emergencies
  - Immigration appointments and/or hearings

Long Term Leave (as defined in the BX and BR contracts)

- Graduate students who work as GSRs and/or salaried ASEs shall be eligible for up to eight (8) weeks of paid leave per academic year.
- When hourly ASEs take Long Term Leave, it shall be unpaid.
- Long term leaves should be entered using Extended Absence in UCPath. These leaves include:
  - Own serious health condition as defined under the Family and Medical Leave Act (FMLA).
  - Pregnancy, childbirth or related medical conditions for the period prior to, during, and after childbirth.
  - To care for and bond with the newborn child or a child placed with the GSR/ASE for adoption or foster care.
  - To care for a family member of the GSR/ASE, who has a serious health condition.
- **Bereavement Leave**
  - Employee will receive regular pay.
  - Locations will process a leave in Extended Absence in UCPath.
- **Jury Duty**
  - Employee will receive regular pay, recorded in UCPath using these Earn codes:
    - JUR (exempt), JRN (non-exempt)
  - Employees will report Jury Duty Leave in TARS which will feed into UCPath for short term Jury Duty Leave.
  - For jury duty leave of longer than one week, locations will process a leave in Extended Absence in UCPath.

Other Leaves

- Military Leave
- Pregnancy Disability Leave

- GSRs who had a remaining balance of previously accrued Vacation Leave hours
    - Vacation Leave usage will be entered in Manage Accruals page in UCPath or through TARS for usage.

LEAVES WITHOUT PAY

Unpaid Leave of Absence (with prior approval)

- Periods of unpaid Leave of Absence that are arranged and approved in advance should be entered using Extended Absence in UCPath prior to pay confirm to avoid overpayments. The employee's record will be coded so that they do not receive pay during the unpaid leave.

Unpaid Leave of Absence (intermittent/unplanned)

- For unpaid leaves that are reported on the leave reporting form and require reduction in pay after the appointee has already been paid:
- **Fiscal Year appointees (Graduate Student Researchers)**
    - When Leave with Pay is selected on the timesheet, TARS will feed LNP earn code to UCPath.
    - UCPath will calculate an amount to reduce pay.
    - This reduction will be reflected on the employee's usual earn code.
    - One day missed is equal to the employee's usual scheduled time on that day.
    - For part-time salaried employees who do not have a standard schedule, then one day missed should be treated as equivalent to (8 hours x employee's job FTE).
    - For hourly employees, the earn code LNP should be submitted with the hours on leave with no pay.
- **Academic Year appointees (Academic Student Employees):**
    - Calculate the daily amount as described in APM 600-Appendix 2.
    - Multiply the daily amount by the number of days of work missed.
        - UCPath will calculate the amount of overpayment using (Full-Time Daily Rate x Appointee's Job FTE x Days Missed). Example: 5 days missed for a 0.50 FTE appointee at a Full Time Daily Rate of $265.00 = ($265.00 x 0.50 x 5) = $662.50
    - Submit through BFS One-Time Payment Tool with <u>negative</u> dollar amount transactions.
        - Use Earn Code RFA (subject to UCRS)
        - Contact BFS for questions for deadline payroll pay period processing deadlines.
        - **Calculating Daily Amount for monthly exempt employees**
            - Per APM 600-Appendix 2, the daily rate for an academic year employee is their Quarterly/ Semester Rate divided by the number of working days in the quarter or semester.
            - Refer to UCR's Academic Calendar to calculate the number of working days in the Fall quarter based on the definition in APM 600-Appendix 2: number of "Mondays, Tuesdays, Wednesdays, Thursdays, and Fridays, including holidays occurring on any of those days, which fall between the <u>beginning and ending dates</u> of" Fall quarter.
            - Overpayment calculation:
            - Quarterly / number of working days = daily rate
                - Quarterly Rate = (1/9 monthly rate) x 3

- (Daily rate) x (percentage of appointment) x (number of days missed) = overpayment

Extended Absence Leave Reasons for GSR and ASE Leave Reporting in UCPath

Type of Leave	Enter in Extended Absence	Extended Absence Leave Reason
Personal Time Off (PTO) *GSRs only*	No	N/A
STL – Personal illness or disability	Yes	ST Medical BX/BR*
STL - Care of a family member, or birth or adoption of a child	Yes	ST Family BX/BR*
STL – Family Emergencies	Yes	ST Family BX/BR
STL - Immigration appointments and/or hearings	Yes	ST Family BX/BR*
LTL – Own serious health condition	Yes	LT Medical BX/BR*
LTL – Pregnancy, childbirth or related medical conditions	Yes	LT Medical BX/BR*
LTL – To care for and bond with newborn child or child placed with the GSR/ASE for adoption or foster care	Yes	Parental Bonding
LTL – To care for a family member of the GSR/ASE	Yes	LT Family BX*
Bereavement Leave	Yes	Bereavement
Jury Duty	Only for leaves longer than 1 week	Jury Duty
Other Leave – Military	Yes	Military Leave
Other Leave – Pregnancy Disability	Yes	Pregnancy Disability Leave

Notes:

STL – Short term leave
LTL – Long term leave