

Academic Employee Leaves Workshop

March 21, 2024

Agenda

- FML Legal Leave Entitlements and PFCB
- Policy-based Leave Entitlements by Population
- Resource updates and reminders
- Leave Request Process
- Leave Module Reminders
- Other Leave Considerations
- APM 025 and OATS reporting
- Departmental Verifications and Reminder

Contacts

Leave Administration		
UCPath Entry		AP-Path@ucsb.edu
FML/Legal Leave Entitlements		AP-Leave@ucsb.edu
Lia Cabello	x 5979	lia.cabello@ucsb.edu
Faculty & AC's in: HFA, Social Sciences, Education, CCS		
Mira Lázaro	x 5728	mslaza@ucsb.edu
Faculty & AC's in: MLPS, Bren School, Engineering		
Joanna Kettmann	x 5048	joanna.kettmann@ucsb.edu
Specialists, Project Scientists, Professional Researchers		
Billy Ko	x 4441	billy.ko@ucsb.edu
Postdoctoral Scholars, Academic Student Employees		

Family/Medical Leaves (FML) and FMLA/CFRA/PDLL

- State & federal laws provide **protections** to eligible employees:
 - Family and Medical Leave Act (FMLA), federal
 - California Family Rights Act (CFRA), state
 - Pregnancy Disability Leave Law (PDLL), state
- Legal entitlements are applied **on top of** policy approved leaves
- Eligibility: at least 12 months of service *and* 1250 hours worked
- Information and resources for departments and employees can be found on the AP website at
<https://ap.ucsb.edu/leave.of.absence/medical.pregnancy.leave.entitlements.protections.and.resources/>

Family/Medical Leaves (FML) and FMLA/CFRA/PDLL

- Academic employee initiates their request for medical leave in AP Folio
- Leave Administrator:
 - Is notified via email of the new leave parcel
 - Identifies FML eligibility
 - Provides the academic employee (cc's department) the information & paperwork related to legal leave entitlements
 - *Files and associated paperwork related to leave entitlements are maintained by the Leave Administrator and **should not be included in department files***
 - Questions about leave entitlements? Refer to Leave section of the website, or email ap-leave@ucsb.edu
- The Leave Parcel routes through normal process for endorsement, policy approval, and post-audit.

Department Responsibilities – FML Leaves

- Details on Leave roles and responsibilities can be found on the AP website under [Leave Information for Department Analysts](#)
- Ensure FML communications are routed correctly, and forward if needed.
 - May be asked to follow up with employees if there is no response to email requests.
 - Important with Return to Work certifications – release required prior returning to work.
- Pay attention to timing of actions, and potential downstream impacts - late approvals/late UCPath entry may result in missed pay or overpayments
 - Work with BFS directly if pay corrections are required.
 - If benefits impacts are identified, the employee needs to initiate a case with UCPC. If there is an *urgent* need – escalation can be requested by emailing ap-path@ucsb.edu.
- Use Leave Reports to track on Extended Absence transactions
 - see AP website for report instructions
 - reach out to ap-leave@ucsb.edu if issues are noted.
- Kronos entry is NOT required for academics, unless otherwise instructed.

Pay for Family Care and Bonding (PFCB)

- PFCB is a *pay option* for FMLA/CFRA eligible employees taking an applicable leave:
 - Eligible Leaves:
 - to care for a family member with a serious health condition
 - to bond with a new child (birth, adoption or placement)
 - military caregiver or qualifying exigency leave
 - Pay is at 100% for up to 8 weeks each calendar year *
 - FML designation *must be applied* to receive this benefit **
 - *requires employee to provide proper documentation or the pay option will not be applied to the unpaid leave*
- Academic employee pay and FML/PFCB decrements are managed centrally via the UCPath Leave Transaction. No Timekeeping entry is required.

**ASE's, GSR's and Postdocs have other pay options available and are not currently eligible for PFCB*

***Lecturer/STE titles have a PFCB option with pay at 100% for up to 4 weeks. If they do not qualify for FML, they are still eligible for PFCB under a qualified personal leave.*

Reproductive Loss Leave

- Effective Jan 1, 2024
- Failed adoption, failed surrogacy, miscarriage, stillbirth, or unsuccessful assisted reproduction
- Eligibility: employed at least 30 days prior to leave start
- Up to 5 days for each loss
- Confidential, protected leave
 - Leave request routes directly to AP from employee
 - Department is notified only that employee will be on confidential, protected leave during dates requested— no further info is provided
 - Follow-up questions directed to AP, not employee
- APM 758

Leave Entitlements by Population

Academic Year (non-student) Employees

Leave Type/Description	Senate Faculty	Unit 18 Faculty (IX Unit, Article 12)	Other AY Employees (e.g. AY ACs)
Medical Leave for Self: Leave due to a personal injury, illness or serious health condition of the employee.	RB VI-3, APM 710 <ul style="list-style-type: none"> < 10 yrs service: 2 paid quarters 10+ yrs service: 3 paid quarters, also for each subsequent 10-yr period 	Article 12.D <ul style="list-style-type: none"> Eligibility: min 66% avg appt during 2-year look back period 0-10 yrs service: up to 22 weeks paid 10+ yrs: up to 36 weeks paid, also for each subsequent 10-yr period 	RB VI-3, APM 710 <ul style="list-style-type: none"> Accrue sick days but not vacation. Leave is unpaid but may be paid using sick accruals.
Family Leave: Leave for the purpose of caring for a family member, (as defined by APM 710-20 or applicable MOU), due to their serious health condition.	RB VI-3, APM 710-20 <ul style="list-style-type: none"> 1 paid quarter Up to 8 weeks pay via PFCB, per calendar year. 	Article 12.Q <ul style="list-style-type: none"> Unpaid for up to 12 weeks * Up to 4 weeks of pay via PFCB **, per calendar year 	RB VI-3, APM 710 Leave is unpaid but may be paid via: <ul style="list-style-type: none"> Using sick accruals Up to 8 weeks pay via PFCB, per calendar year.
Parental Leave: Leave for the purpose of carrying out childrearing.	RB VI-4, APM 715, APM 760 <ul style="list-style-type: none"> Unpaid leave for up to 1 year Up to 8 weeks of pay via PFCB, per calendar year. 	Article 12.I <ul style="list-style-type: none"> Unpaid leave for up to 1 year Up to 4 weeks of pay via PFCB **, per calendar year. 	RB VI-3, APM 715, APM 760 Leave is unpaid but may be paid via: <ul style="list-style-type: none"> Using sick accruals Up to 8 weeks pay via PFCB, per calendar year.
Childbearing Leave: Leave relating to pregnancy and childbearing.	RB VI-4, APM 760 <ul style="list-style-type: none"> Up to 8 weeks paid leave Any unpaid leave beyond 8 weeks may be paid via PFCB (up to 8 weeks/calendar year) 	Article 12.C <ul style="list-style-type: none"> Up to 8 weeks paid leave Any unpaid leave beyond 8 weeks may be paid via PFCB ** (up to 4 weeks/calendar year) 	RB VI-4, APM 760 Leave unpaid (up to 8 wks) but may be paid via: <ul style="list-style-type: none"> Using sick accruals Up to 8 weeks pay via PFCB, per calendar year.
ASMD: Not a leave, but a reduction of duties if responsible for >= 50% care of a child immediately following birth, or adoption of a child under the age of 5.	RB VI-5, APM 760 <ul style="list-style-type: none"> Birth parent: up to 3 quarters Non-birth parent: up to 1 quarter 	IX MOU Article 12.P <ul style="list-style-type: none"> Birth parent: up to 3 quarters Non-birth parent: up to 1 quarter 	RB VI-5, APM 760 <ul style="list-style-type: none"> Birth parent: up to 3 quarters Non-birth parent: up to 1 quarter Reduced portion is unpaid but may be paid using sick accruals

Fiscal Year (non-student) Employees

Leave Type/Description	Represented Academic Researchers (RA Unit; TA'd Article 12)	Postdoctoral Scholars (PX Unit; TA'd Article 12)	Other FY & Policy-Covered Employees (e.g. non-rep ARs, FY AC)
Medical Leave for Self: Leave due to a personal injury, illness or serious health condition of the employee.	<ul style="list-style-type: none"> • Accrue both sick and vacation days. • Leave is unpaid but may be paid using sick/vacation accruals. 	<ul style="list-style-type: none"> • 24 days PTO + 12 days sick each appt year • Leave is unpaid but may be paid using sick leave or PTO 	RB VI-3, APM 710 <ul style="list-style-type: none"> • Accrue both sick and vacation days. • Leave is unpaid but may be paid using sick/vacation accruals.
Family Leave: Leave for the purpose of caring for a family member, (as defined by APM 710-20 or applicable MOU), due to their serious health condition.	Article 12.B Leave is unpaid but may be paid via: <ul style="list-style-type: none"> • Using sick/vacation accruals • Up to 8 weeks pay via PFCB, per calendar year. 	Leave is unpaid but may be paid via: <ul style="list-style-type: none"> • Using sick leave or PTO • Up to 8 weeks paid via Postdoctoral Paid Family Leave (PPFL) * 	RB VI-3, APM 710 Leave is unpaid but may be paid via: <ul style="list-style-type: none"> • Using sick/vacation accruals • Up to 8 weeks pay via PFCB, per calendar year.
Parental Leave: Leave for the purpose of carrying out childrearing.	Parental Bonding Leave (Article 12.B) <ul style="list-style-type: none"> • Birth parent: Up to 12 weeks following PDL (combined max of 7 months) • Non-birth parent: Up to 12 weeks Leave is unpaid but may be paid via: <ul style="list-style-type: none"> • Using sick/vacation accruals • Up to 8 weeks pay via PFCB, per calendar year. 	Up to 12 weeks; leave is unpaid but may be paid via: <ul style="list-style-type: none"> • PPFL (see above) • Using PTO 	RB VI-3, APM 715, APM 760 Leave is unpaid but may be paid via: <ul style="list-style-type: none"> • Using sick/vacation accruals • Up to 8 weeks pay via PFCB, per calendar year.
Childbearing Leave: Leave relating to pregnancy and childbearing.	Pregnancy Disability/Childbearing Leave (Article 12.C) Leave unpaid (up to 4 months) but may be paid via: <ul style="list-style-type: none"> • Using sick/vacation accruals • Up to 8 weeks pay via PFCB, per calendar year. 	Pregnancy Disability Leave Leave unpaid (up to 4 months) but may be paid via: <ul style="list-style-type: none"> • Sick leave • PTO following sick leave exhaustion 	RB VI-4, APM 760 Leave unpaid (up to 8 wks) but may be paid via: <ul style="list-style-type: none"> • Using sick/vacation accruals • Up to 8 weeks pay via PFCB, per calendar year.
ASMD: Not a leave, but a reduction of duties if responsible for >= 50% care of a child immediately following birth, or adoption of a child under the age of 5.	See Parental Bonding Leave , above	Not Eligible	RB VI-5, APM 760 <ul style="list-style-type: none"> • Birth parent: up to 36 weeks • Non-birth parent: up to 12 weeks • Reduced portion is unpaid but may be paid using sick/vacation accruals

ASEs and GSRs (BR & BX units)

MEDICAL and FAMILY-RELATED LEAVES		
LEAVE TYPE AND DURATION	REQUEST PROCESS	PAY STATUS
SHORT-TERM LEAVE For the purposes of: <ul style="list-style-type: none"> Personal illness and/or disability; Birth, adoption, or care of a child or family member¹; Family emergencies; or Immigration appointments and/or hearings². 2 days per academic quarter for salaried employees ³ . Additional time off may be granted at the discretion of the Hiring Department but not to exceed the appointment end date.	<p>The employee shall complete the ASE/GSR Leave from Employment Request Form and submit to their Supervisor in a timely manner, but no less than 1 working day in advance of the anticipated leave date, unless the leave is for an unanticipated personal/family illness or bereavement.</p> <p>The written request must contain the reason for the leave, the expected duration, and any supporting documentation as appropriate to the leave type.</p> <p>Paid leave shall be treated as normal paid status in UCPATH.</p> <p>For Unpaid Leave – The ASE/GSR shall report the approved unpaid leave period in Kronos by selecting the Pay Code: ASE/GSR Unpaid Time Off and entering the number of scheduled work hours for each day(s) off.</p>	<ul style="list-style-type: none"> 2 days of paid leave for salaried employees. (Teaching Assistants, Associate Instructors, And Graduate Student Researchers) Unpaid for hourly employees (Readers and Remedial Tutors). Unpaid for additional time off – for all employees.
LONG-TERM LEAVE – <i>for salaried employees only</i> For the purposes of following: <ul style="list-style-type: none"> Pregnancy, child birth or related medical conditions prior to, during and after childbirth⁴; The employee's own serious health condition⁵, care of a family member who has a serious health condition; or To care for and bond with a newborn child or a child placed with the employee for adoption or foster care.⁶ <u>Up to</u> 8 weeks of paid leave in an academic year. Additional time off may be granted at the discretion of the Hiring Department but not to exceed the appointment end date.	<p>The employee shall complete the ASE/GSR Leave from Employment Request Form and submit to their Supervisor at a minimum of 30 calendar days in advance of the anticipated begin date or as soon as possible, if the leave is unforeseeable.</p> <p>The written request must contain the reason for the leave, the expected duration, and any supporting documentation as appropriate to the leave type.</p> <p>If approved, the Hiring Department shall forward the leave documents to the Office of Academic Personnel (AP) for processing as an Extended Absence in the UCPATH Absence Management module. AP will provide the employee with their FML designation notice. (cc'ing in Hiring Department and the Graduate Division)</p> <p>Employees returning to work from leave due to pregnancy, child birth, or related medical condition, or serious health condition will be provided the Return to Work Certification Form, to be completed by the Primary Care Provider, and return to the AP Leave Manager prior to the return work date by fax at: (805) 893 –7712 or by email to: ap-leave@ucsb.edu.</p>	<ul style="list-style-type: none"> Paid - <u>Up to</u> 8 weeks per academic year regardless of the number of qualifying events. NOTE: Academic Year refers to the start of Fall Quarter through the end of Summer. Unpaid for additional time off.
PREGNANCY DISABILITY For pregnancy and/or reasonable accommodation for pregnancy disability, childbirth, and related medical conditions. ⁷ <u>Up to</u> 4 months in a 12-month period but not to exceed the employee's appointment end date.		<ul style="list-style-type: none"> Pregnancy Disability leave is normally unpaid. Can be taken concurrently with the (up to) 8 weeks of paid Long-Term Leave. The Hiring Department continues to pay the employee's University-sponsored health insurance for the duration of the approved leave.

Leave Resources

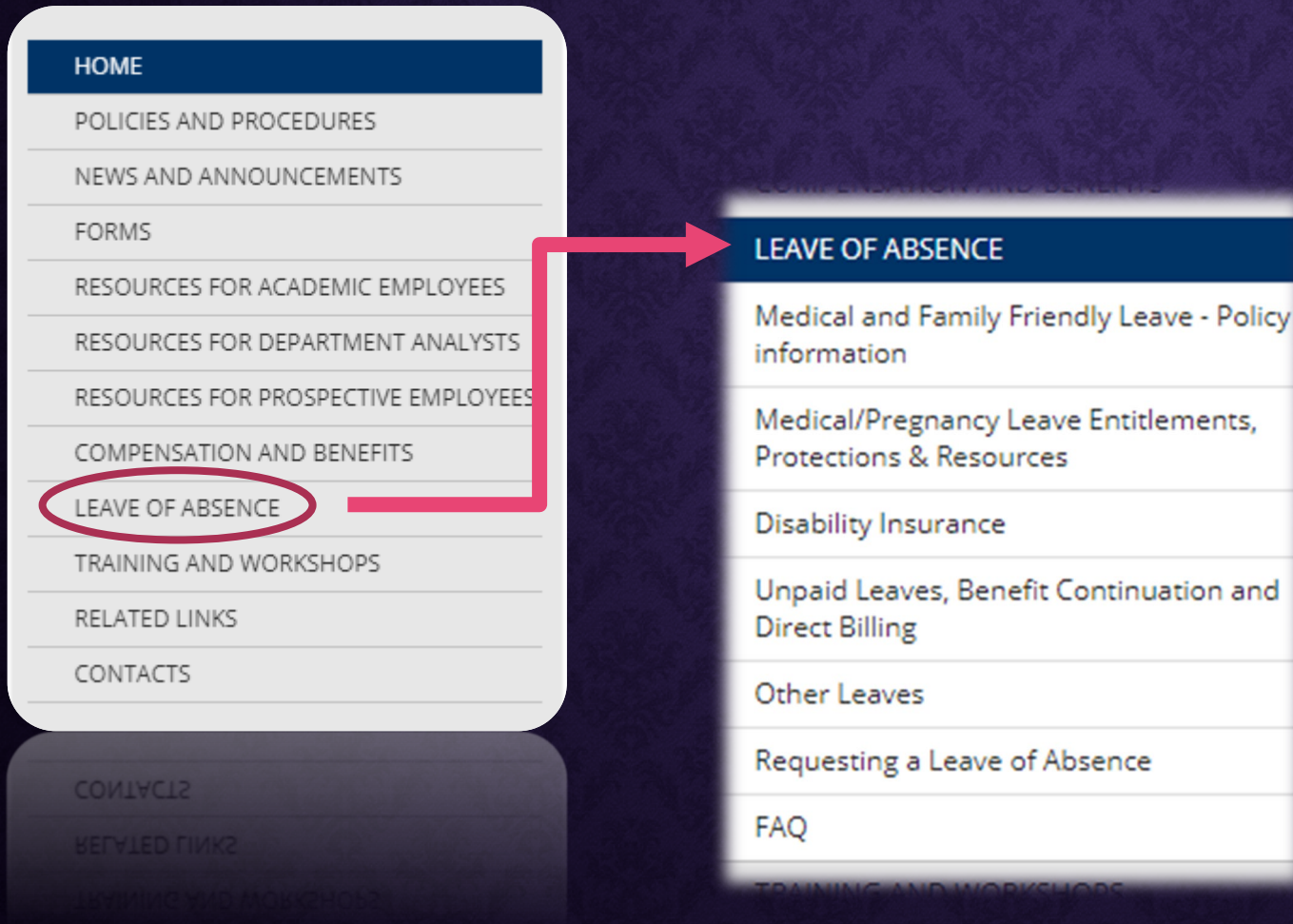
For both academic employees and departments

General Leave Resources

Resources related to all leave types (Personal, Sabbatical, Medical, etc.)

- **Leave of Absence** section on AP website
- **Leave Information for Department Analysts** under Resources for Department Analysts
- **Data Warehouse** reports
- **User Guide** instructions on requesting leaves through AP Folio

Leave of Absence webpage



Employee & Department Resources:

- Policy information
- Legal leave entitlements
- Unpaid Leaves and Direct Billing
- Disability Insurance
- Family Friendly Resources

Resources for Department Analysts

HOME
AP FOLIO
POLICIES AND PROCEDURES
NEWS AND ANNOUNCEMENTS
FORMS
RESOURCES FOR ACADEMIC EMPLOYEES
RESOURCES FOR DEPARTMENT ANALYSTS
RESOURCES FOR PROSPECTIVE EMPLOYEES
COMPENSATION AND BENEFITS
LEAVE OF ABSENCE
TRAINING AND WORKSHOPS
RELATED LINKS
CONTACTS

Resources for Department Analysts

Implementation of New Labor Contracts for GSRs, ASEs and Postdocs

- [March 10, 2023 Memo to Campus -- UAW Contract Implementation](#)
- [FAQs for Implementation of New Labor Contracts for GSRs, ASEs and Postdocs](#) ⓘ

Non-Senate Academic Employees

- [Unit 18 Contract Updates and Toolkit \(2022\)](#)
- [Postdoctoral Scholar Appointments](#)
- [Graduate Student Appointments](#)
- [Research Appointments](#)

General Resources

- [Forms](#)
- [UCPath](#)
- [UC Outside Activity Tracking System \(OATS\)](#)
- [UC Recruit](#)

Job board and online application system for open academic positions at UCSB.


- [Intergovernmental Personnel Act \(IPA\) Agreements](#) ⓘ
- [Payment for Online Course Development](#) ⓘ
- [Courtesy and WOS Appointments](#) ⓘ
- [Frequently Asked Questions](#)

Leave of Absence

- [Leave Information for Department Analysts](#) ⓘ
- [Leaves User Guide](#) ⓘ
- [Data Warehouse Extended Absence Report Guide](#) ⓘ
- [Data Warehouse Employees on Leave in Job Data Report Guide](#) ⓘ
- [Leave of Absence - Policy and Legal Entitlement Information](#)

Leave Information for Department Analysts

Leave of Absence

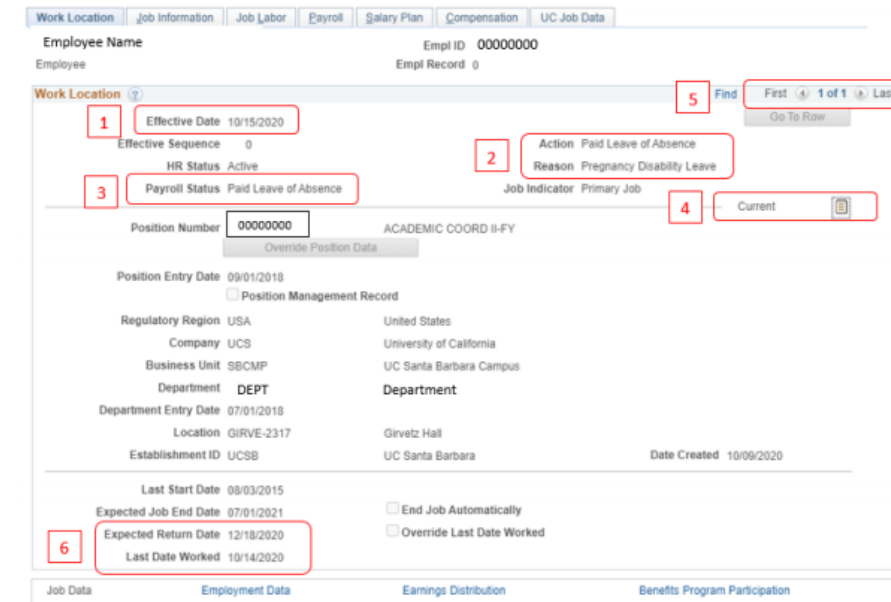
- [Leave Information for Department Analysts](#) 
- [Leaves User Guide](#) 
- [Data Warehouse Extended Absence Report Guide](#) 
- [Data Warehouse Employees on Leave in Job Data Report Guide](#) 
- [Leave of Absence - Policy and Legal Entitlement Information](#)

- Identifies roles and responsibilities throughout the leave process
- Overview of leave administration from a department perspective
- Reviewing leave information in **Job Data**

Understanding Leave Information in Job Data

Leaves are entered in Job Data by UCPC. Review leave entries by paging through Job Data for all leave related actions.

1. The **Effective Date** of the start of leave will appear in Job Data with the corresponding leave Action/Reason.
2. The **Action/Reason** provides information on leave type entered and pay status during leave.
3. **Payroll Status** provides information regarding the pay status while on leave. This remain unchanged unless the pay status of a leave changes during the course of the leave, or until the return is processed in Job Data.
4. The **History/Current/Future** field provides context to the status of that data row in Job Data.
 - a. **History** are all data rows *before* the top, current-active data row. If a change is entered in Job Data while the leave is active, page through to find the leave transaction Action/Reason.
 - b. **Current** is the *top* data row currently active. When a leave is active, the Payroll Status will always reflect the Leave status (exception – reduced schedule and intermittent leaves do not appear in Job Data).
 - c. **Future** shows all Job Data entries with a future Effective Date. (Note: AY leaves typically have the future dated return entered in Job Data in advance.)
5. The < and > buttons are used to navigate through **History**, **Current** and **Future** rows of Job Data.
6. The **Expected Return Date** and **Last Date Worked** dates related to the leave.



Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation | UC Job Data

Employee Name: [] Empl ID: 00000000
Employee: [] Empl Record: 0

Work Location: [] Find: First 1 of 1 Last
Go To Row

1 Effective Date: 10/15/2020
Effective Sequence: 0
HR Status: Active
3 Payroll Status: Paid Leave of Absence
Job Indicator: Primary Job
2 Action: Paid Leave of Absence
Reason: Pregnancy Disability Leave
4 Current

Position Number: 00000000 ACADEMIC COORD II-FY
Override Position Data

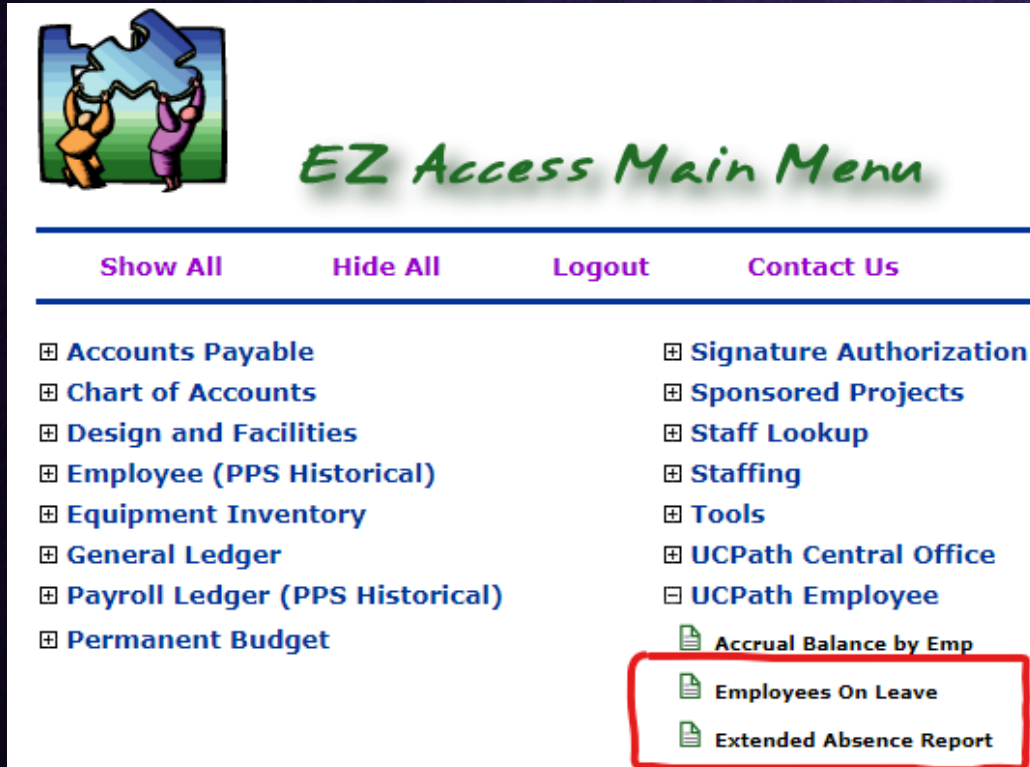
Position Entry Date: 09/01/2018
Position Management Record

Regulatory Region: USA United States
Company: UCS University of California
Business Unit: SBCMP UC Santa Barbara Campus
Department: DEPT Department
Department Entry Date: 07/01/2018
Location: GIRVELZ-2317 Girvelz Hall
Establishment ID: UCSB UC Santa Barbara Date Created: 10/09/2020

Last Start Date: 08/03/2015
Expected Job End Date: 07/01/2021
Expected Return Date: 12/18/2020
Last Date Worked: 10/14/2020
End Job Automatically
Override Last Date Worked

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

Data Warehouse Leave Reports



Employees on Leave report pulls data from **Job Data**

Extended Absence Report pulls data from **Extended Absence** module

- Overview of leave dates, leave type and pay status
- Report Guides – provide field definitions and report overviews (located under Resources for Dept. Analysts)

<https://ap.ucsb.edu/resources.for.department.analysts/>

Leave of Absence

- [Leave Information for Department Analysts](#)
- [Leaves User Guide](#)
- [Data Warehouse Extended Absence Report Guide](#)
- [Data Warehouse Employees on Leave in Job Data Report Guide](#)
- [Leave of Absence - Policy and Legal Entitlement Information](#)

Reviewing approved leaves entered in UCPath

- Review Data Warehouse Reports
 - Audit all leave information in Extended Absence
 - Review current leave data in Job Data
- Validate leave data in Job Data
 - Leave dates
 - Pay status
 - Return from leave
- If Job Data issues are identified, notify the Leave Administrator ap-leave@ucsb.edu
- Departments are responsible for initiating any pay related actions due to late leave approvals/UCPath fulfillment.

MOU/Contract Links

- Academic Researchers Unit (RA)– TA'd Article 12:
 - <https://ap.ucsb.edu/leave.of.absence/medical.and.family.friendly.leave/Article%2012%20-%202nd%20TAd%20contract%20-%20RA%20Unit.pdf>
- Postdoctoral Scholar Unit (PX)– TA'd Article 12:
 - https://ucnet.universityofcalifornia.edu/labor/bargaining-units/px/docs/px_tentative_agreements_effective_12-09-2022.pdf#page=48
- Unit 18 Lecturers (IX)– Article 12:
 - https://ucnet.universityofcalifornia.edu/labor/bargaining-units/ix/docs/ix_12_leaves_2021-2026.pdf
- ASE's (BX)– Article 18:
 - https://ucnet.universityofcalifornia.edu/labor/bargaining-units/bx/docs/bx_18-leaves_2022-2025.pdf
- GSR's (BR)– Article 17:
 - https://ucnet.universityofcalifornia.edu/labor/bargaining-units/br/docs/br_17_leaves_2022-2025.pdf

Policy Links

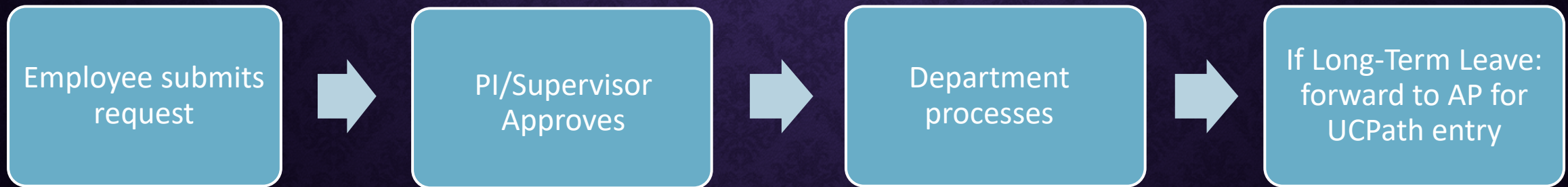
- APM Section V:
 - <https://www.ucop.edu/academic-personnel-programs/academic-personnel-policy/benefits-and-privileges/index.html>
- Red Binder Section VI:
 - <https://ap.ucsb.edu/policies.and.procedures/red.binder/complete.red.binder.pdf#page=196>

Submitting and Processing Leave Requests

AP Folio Leave Module Review

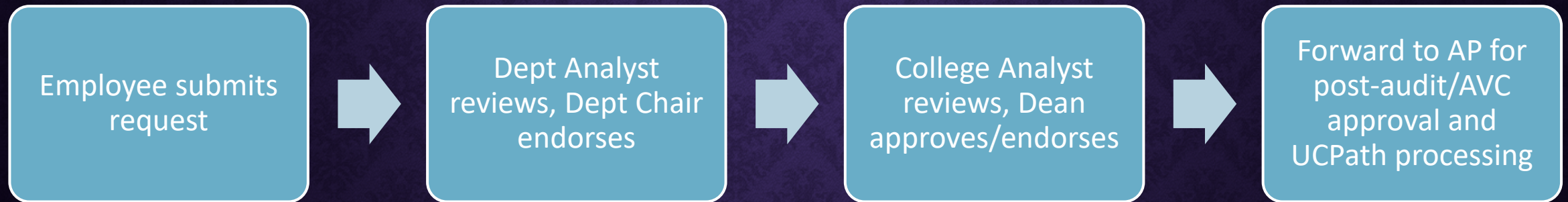
Requesting the Leave (ASEs and GSRs)

- NOT done via AP Folio. Managed at department level:
- <https://ap.ucsb.edu/resources.for.department.analysts/graduate.student.appointments/ASE.and.GSR.Leave.from.Employment.Request.Form-March.2024.pdf>



Requesting the Leave (non-student academics)

- AP Folio Leave Module



- Questions about leaves should be directed to ap-leave@ucsb.edu
 - Do NOT submit a ServiceNow ticket!

User Guide – submitting leave requests in AP Folio

- Step-by-step guide for various leave types for:
 - Faculty
 - Leave-Accruing Titles
 - Postdocs
- General legal medical leave entitlements information
- Posted at:
 - Resources for Academic Employees
 - Resources for Department Analysts
 - Leave Request form (academic employees)
 - Leave of Absence → Requesting a Leave of Absence
 - <https://ap.ucsb.edu/resources.for.academic.employees/leaves.user.guide.pdf>

Multiple Units and/or Jobs

- Single Employee in a Single Title over multiple units
 - e.g. Professor in Computer Science and Physics
 - Employee only submits one request
 - Each department's request is processed separately
- Single Employee in Separate Titles
 - e.g. Continuing Lecturer + Project Scientist
 - Employee must submit separate request for EACH title

Faculty: Sabbatical/Research Options

Type of Leave:

- ☒ Sabbatical or Research
☐ Medical, Personal, Active Service-Modified Duties (ASMD), etc.

Academic Year of Leave:

2024-2025 ▼

Quarters of Leave:

- ☐ Fall
☐ Winter
☐ Spring

Additional quarters outside of the selected Academic Year, if any:

e.g. Fall 2025, Spring 2025

[Pay and Service Period Charts](#) 

Type of Leave:

- ☐ Full Sabbatical/Educational
☐ 2/3 Sabbatical/Educational
☐ In Residence Sabbatical/Educational
☐ Special Research (Fellowship, Special Leave, etc.)
☐ Without Salary Research

Non-accruing titles: Personal Options

Academic Year of Leave:

2023-2024 ▼


Quarters of Leave:

☐ Fall

☐ Winter

☐ Spring

Additional quarters outside of the selected Academic Year, if any:
e.g. Fall 2025, Spring 2025

[Pay and Service Period Charts](#) 

For partial quarter leaves, calendar dates of leave:

YYYY-MM-DD — YYYY-MM-DD

Type of Leave:

☐ Medical with pay (full or partial), for self

☐ Medical with pay (full or partial), for other

☐ Medical without pay, for self

☐ Medical without pay, for other

☐ Parental without pay

☐ Personal without pay

☐ Reproductive Loss

☐ Childbearing

☐ Active Service-Modified Duties (ASMD)

☐ Parental with Pay via PFCB*

☐ Short Term Leave > 8 calendars, per RB VI-7-B

Faculty Leaves: Concurrent Admin Appts

Do you hold an approved Administrator role (e.g. Director, Chair, etc) for which you receive a stipend?:


- ☒ Yes
- ☐ No

Please select how the fellowship funds will be administered:

- ☒ My Administrator role should be revised to exclude my leave dates (i.e. stipend paused during the leave period)
- ☐ I am eligible to continue in my Administrator role (i.e. continue receiving stipend) while on leave

Faculty Leaves: Sabbatical Credits & Cat I approval

of Sabbatical/Educational Credits to Be Used:

Is Category I Outside Activities Approval Required, and if so, have you submitted your [Prior Approval Request](#)  ?:

- ☐ Yes, Category I Outside Activities Approval Required, **Prior Approval Request Submitted and Approved**
- ☐ Yes, Category I Outside Activities Approval Required, **Prior Approval Request Submitted and NOT YET Approved**
- ☒ Yes, Category I Outside Activities Approval Required, **Prior Approval Request NOT Submitted**
- ☐ No, Category I Outside Activities Approval NOT Required

- Note: AP Folio is currently the correct source of sabbatical accruals (as of the end of the current AY), *NOT* UCPath!

Accruing Titles: Options

Academic Year of Leave:

2023-2024 ▼

Dates of Leave:

YYYY-MM-DD

—

YYYY-MM-DD

Type of Leave:

- ☐ Medical with pay (full or partial), for self
- ☐ Medical with pay (full or partial), for other
- ☐ Medical without pay (full or partial), for self
- ☐ Medical without pay (full or partial), for other
- ☐ Reproductive Loss
- ☐ Childbearing
- ☐ Parental
- ☐ Personal
- ☐ Active Service-Modified Duties (ASMD)
- ☐ Short Term Leave > 8 or more calendar days, per RB VI-7-B

Requesting a Leave with PFCB

When an employee submits a leave request that includes PFCB:

Accruing Titles:

Leave Type Requested:
Please identify the dates associated with each Leave Type requested, and the type of Accruals Used, if applicable. To add more than one leave type to this request, click the + button. (e.g. Paid Medical (using accruals), followed by Unpaid Medical (after accruals are exhausted).)

Date From	Date To	Leave Type	Accruals Used
X 2021-07-01	2021-07-14	Medical with pay, for other (full/partial)	<input type="checkbox"/> Sick <input type="checkbox"/> Vacation <input type="checkbox"/> Postdoc PTO
X 2021-07-15	2021-07-31	Med with pay for other – PFCB*	N/A

+

*FML criteria must be met to qualify for Pay for Family Care and Bonding (PFCB); all necessary documentation must be received and the FML designation(s) applied to receive pay via PFCB on an approved policy leave. Please note that you may be eligible for [other paid leave options available under policy](#).

If you elect to apply for PFCB, the [AP Leave Administrator](#) will email the necessary FML forms and instructions once the Leave parcel is submitted in AP Folio.

Non-Accruing Titles:

Pay for Family Care and Bonding (PFCB)*
[PFCB](#) may be applied to **Medical Leave for other** and **Parental with Pay via PFCB** when Family and Medical Leave (FML) criteria are met and all necessary documentation is received in order to designate the leave under the appropriate FML entitlements. Please note that you may be eligible for [other paid leave options available under policy](#).

PFCB Request:
☐ Yes, apply PFCB to my eligible leave request for the following dates:
Dates: –
☐ No/Not applicable

Eligibility criteria for FMLA/CFRA have been met to be eligible for PFCB? (Completed by AP Leave Administrator)
☐ Yes
☐ No

- FML eligibility is identified on the leave parcel in the eligibility criteria section, as well as in the FML notice email sent to the employee (department is cc'd).
- If FMLA/CFRA criteria are not met (“No” is checked in the FML eligibility criteria box), and policy approvals are still pending, the department should work with the employee to revise the leave parcel (to request other pay options, or shift the request to unpaid).

the AP Leave Administrator reviews if FML (FMLA/CFRA) criteria are met.

Accruing Titles: Accruals usage and verification

Leave Details:

Please identify the dates associated with each Leave Type requested, and the type of Accruals Used, if applicable. To add more than one leave type to this request, click the + button. {e.g. Paid Medical (using accruals), followed by Unpaid Medical (after accruals are exhausted).}

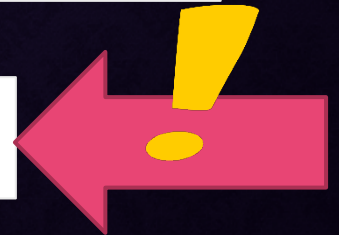
Date From	Date To	Leave Type	Accruals Used
X 2024-03-01	2024-03-31	Parental with pay	<input checked="" type="checkbox"/> Sick <input checked="" type="checkbox"/> Vacation <input type="checkbox"/> Postdoc PTO <input type="checkbox"/> Paid Parental
X 2024-04-01	2024-03-15	Personal without pay	N/A
<div>+ </div>			

Accruals Available:

If you will use accruals to remain on pay during the course of your leave, please provide your current accrual balances certifying that accruals are available:

Sick	<input type="text" value="127"/>
Vacation	<input type="text" value="218"/>
PTO	<input type="text"/>

I certify that the employee has the accruals available to remain on pay status for the duration of the requested paid leave.

☐

Approval Authority

Title	Control Point
Teaching Titles (Senate Faculty and Unit 18 Faculty)	Dean
Research Titles (Researchers, Project Scientists, Specialists, Postdocs)	AVC
Academic Student Employees	Dept Chair/Unit Director
Academic Coordinators	Dean or AVC
Librarians	University Librarian
Exceptions to Policy (any of the above)	AVC

Other Leave Considerations

Academic Leave vs Leave from Employment (students)

- Academic Leave of Absence
 - Time away from academic (degree) program
 - Degree program status protected during leave
 - No enrollment or fee payments required
- Leave from Employment
 - Time away from employment responsibilities
 - Eligibility: enrolled in min units & have ASE/GSR appt \geq 25% during leave
 - Maintains eligibility for fee remission and other employment benefits

Leave Funding Scenarios

- Partial Sabbatical supplement and Special Research Leaves*
 - Overall professorial position remains at 1.0 FTE
 - Split funded on professorial position
 - e.g. 67% on state funds, 33% on grant funds
- UCPath
 - Leave Entry is managed centrally in AP via Extended Absence (EA)
 - Funding entry is managed by the department

** Special Research Leaves: when pay is issued directly to the employee by the outside agency, this is managed as a “leave no pay JED” via the EA transaction (no funding entry) – JED can be viewed in Job Data within the Earnings Distribution link and will appear as a REG/LPJ % split.*

A note on Special Research Leaves

- Important to verify whether funds are administered through UCSB or paid directly to the faculty member
 - Former = 100% pay through UCSB, either split-funded or dual position
 - Latter = partial pay status at UCSB, partial *unpaid* leave
- UCSB/agency split will be modified upon salary increases
- Be mindful of timeliness of submission (esp 9/12 dates!)
- Always requires AVC approval, even if Dean has endorsed
 - Must always submit these requests in AP Folio

Special Research Leaves: Leave Request

Funding Information:

Please select how the fellowship funds will be administered:

- ☒ Paid through UCSB Payroll
☐ Paid Directly to Employee from Funding Agency

Annual Salary Rate:	<input type="text" value="145,300"/>	Fellowship Amount:	<input type="text" value="100,000"/>
Monthly Salary Rate:	<input type="text" value="12,108.33"/>	Dates paid from Fellowship (e.g. 7/1/24-12/31/24:	<input type="text" value="9/1/24 -- 6/30/25"/>
% on State Funds:	<input type="text" value="31.18%"/>	% on Fellowship Funds:	<input type="text" value="68.82%"/>

Admin Stipends while on Leave

- Faculty on sabbatical or other extended leave may not receive administrative stipends
- If candidate wishes to continue receiving stipend while on leave, they must include justification in the text box:
 - What admin duties will they continue to perform?
 - How will they perform these duties while on leave?
- If not, contact EVC's office to suspend admin stipend payments for duration of leave

APM-025 and OATS

- Senate and Adjunct faculty at $\geq 50\%$
- Summer Reporting
 - Hours reported only if simultaneously drawing summer salary
- Reporting while on LNS
 - Activity input required
 - No effort (hours) reporting required
- Category III
 - Not required to be input unless there is student involvement
 - Required if full-time administrator compensated for activity

OATS Reporting Stages

- It is a multi-step process!
 1. Category I prior approval – BEFORE undertaking the activity
 2. Hours of effort – WHILE undertaking Cat I and Cat II activity
 3. Annual Certification – AFTER the AY is over
- #1 source of faculty misconception that they have “already submitted” OATS report
- Point them to the step-by-step user guides:
 - ap.ucsb.edu/resources.for.department.analysts/oats/training.resources/

Outside Activities (APM-025) and Leaves

- Category I prior approvals should be obtained before the leave can be approved
 - Double-check Cat I notation on Leave form
 - Double-check Leave notation on OATS form
- Read through the leave request to see if Cat I might be applicable
- Work with your faculty to request Cat I prior approval in OATS

Is Category I Outside Activities Approval Required, and if so, have you submitted your [Prior Approval Request](#) ?:

- ☐ Yes, Category I Outside Activities Approval Required, **Prior Approval Request Submitted and Approved**
- ☐ Yes, Category I Outside Activities Approval Required, **Prior Approval Request Submitted and NOT YET Approved**
- ☒ Yes, Category I Outside Activities Approval Required, **Prior Approval Request NOT Submitted**
- ☐ No, Category I Outside Activities Approval NOT Required

Will you be requesting a full- or part-time leave without pay to engage in this activity?

☐ Yes ☒ No

Modifying the Leave?

- Employee submits written request to dept w/detailed explanation of changes requested
- If leave is still in progress: mid-stream changes to current parcel may be possible. Contact AP Analyst
- If leave is already approved: new parcel may or may not be needed, or original parcel may be modified. Contact AP Analyst

Department Responsibilities: General Leaves

- See “Leave Information for Department Analysts” document
- First stop for academic employee consultation for:
 - Providing general policy info and guidance
 - Reviewing leave eligibility
- Assisting employees with leave request submission
- Managing leave request uploads, following up on routing
- Monitoring existing approved leaves in UCPath
 - Follow up with employees as needed
 - Notifying AP if leave entry issues are noted

Department Responsibilities: Other Considerations

- Currently earning admin stipend?
 - Suspend or continue
- Serving as PI on grant?
 - Contact Sponsored Projects officer in OR to address potential impacts
- Where is the funding coming from?
 - Administered by UCSB vs paid direct to employee
- Category I approval required?
 - Don't just take the form input at face value

What else should departments check for?

- Confirm accuracy of available accruals
 - Sabbatical credits
 - Quarters of paid (e.g. medical) leave available
 - Sick/Vacation/PTO accruals to accommodate paid dates of leave
- Sabbatical validations
 - Request contains narrative addressing points in APM 740-94
 - In-Residence sabbatical is justified
- Is the leave type within policy?
 - Are they eligible for the type of leave being requested?

Reminders

- Observe submission deadlines as outlined in Red Binder
 - Especially for 9/12 employees!
- ASMD: not technically a leave, but a modification of job duties
- PFCB: not a leave. Pay option associated with unpaid leave.
- FMLA/CFRA/PDLL: not a leave itself, but a designation applied to a policy approved leave that provides job protection
 - These protections run *in parallel* to the policy-approved leave
- Done outside AP Folio:
 - Clock/service limitation extension *only*
 - Cancelling/modifying already-approved leave within same AY – see User Guide!
- If Leave Request is in AP's queue, rest assured we are actively working on it

Who to contact?

- Academic employees should begin with their department staff
- Questions about legal leave entitlements? Ap-leave@ucsb.edu
- Questions about leave policies? Contact appropriate AP analyst
- Do NOT submit HR ServiceNow ticket!
- <https://ap.ucsb.edu/news.and.announcements/memos/?1.17.2024.Reminder...Leave.Request.Protocols>
- If Leave Request is in AP's queue, rest assured we are actively working on it

AP Office Hours

- Every Monday from 1-2pm
- <https://ucsb.zoom.us/j/82238434575>
Meeting ID: 822 3843 4575

Questions?

