Academic Employee Leaves Workshop

April 1, 2020
Agenda

• Overview of Academic Populations
• Process and Leave Module Updates
• Family/Medical Leaves and FMLA
• Other Actions
• Reminders
  • Departmental verifications
  • Admin Stipends
  • Outside Activities (APM 025)
• User Guide and Reports
Overview of Populations

• Accruing vs non-accruing titles
• Titles in AP Folio vs those not in AP Folio
• Titles covered by MOU vs APM
• Single Employee in:
  • Multiple different units (same title)
  • Multiple different titles
Accruing vs Non-Accruing Titles

• Accruing Titles:
  • Researchers, Project Scientists, Specialists
  • Academic Coordinators
  • Postdoctoral Scholars

• Non-Accruing Titles:
  • Senate Faculty
  • Unit 18 Lecturers (pre-six and continuing)
  • ASEs and GSRs
Titles in AP Folio vs Those Not In AP Folio

• Titles in AP Folio:
  • Senate Faculty
  • Continuing Lecturers
  • Researchers, Project Scientists, Specialists
  • Academic Coordinators

• Titles not in AP Folio:
  • Pre-six Lecturers
  • Postdoctoral Scholars
  • Academic Student Employees
Titles Covered by MOU vs APM

• Titles covered by MOUs:
  • Postdocs
  • Some Researchers, Project Scientists, Specialists
  • Unit 18 Lecturers
  • Academic Student Employees (non-GSRs)
  • If not in MOU, see APM

• All others covered by APM/Red Binder (incl GSRs)
  • If not in APM, see PPSM
A note on Academic Student Employees

• Covered by MOU: TAs, Associates, Readers, Remedial Tutors
• Covered by APM/RB: GSRs
• See ASE Leave Chart to determine eligibility and procedures
• Submit ASE/GSR Leave Form, not AP Folio request
• Leave Chart and Request Forms at:
  • https://ap.ucsb.edu/resources.for.department.analysts/graduate.student.appointments/
• Contact Billy Ko for questions
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
Online Leave Module: Process

- **Academic Employee**
  - Initiates leave request in AP Folio

- **Dept Analyst**
  - Reviews
  - Forwards to Dept Chair/Unit Director

- **Dept Chair/Unit Director**
  - Reviews and endorses
  - Routes to Control Point (College or AP)

- **College or AP Analyst**
  - Forwards to Control Point (Dean or AVC)

- **Control Point**
  - Approves or Endorses Request
  - Forwards to AP if AP is not already the final approver
Leave Module Updates

- Routing updates
  - No more back-routing to analyst from Chair/Director/Dean
  - Can route parcel back to any level until dept analyst

- Form updates
  - Multiple types of leave can be selected (e.g. childbearing *and* ASMD)
  - Administrative stipend question for sabbaticals
  - Category I Outside Activities approval question
# Approval Authority

<table>
<thead>
<tr>
<th>Title</th>
<th>Control Point</th>
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<tbody>
<tr>
<td>Teaching Titles (Senate Faculty and Non-Senate Faculty)</td>
<td>Dean</td>
</tr>
<tr>
<td>Research Titles (Researchers, Project Scientists, Specialists, Postdocs)</td>
<td>AVC</td>
</tr>
<tr>
<td>Academic Student Employees</td>
<td>Dept Chair/Unit Director</td>
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<tr>
<td>Academic Coordinators</td>
<td>Dean or AVC</td>
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<tr>
<td>Librarians</td>
<td>University Librarian</td>
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Family/Medical Leaves and FMLA

• The academic employee initiates their request in AP Folio
• Leave Administrator is notified via email
• Leave Administrator provides academic employee and dept staff with the appropriate information and paperwork related to legal leave entitlements
• Questions about leave entitlements? ap-leave@ucsb.edu
Other Actions

• Clock/service limitation extension only?
  • Request outside AP Folio

• Cancelling or modifying an already-approved leave?
  • Request outside AP Folio
  • Approved outside AP Folio and sent to AP
    • AP will upload above documents to existing (archived) leave parcel

• Dept Chair requesting leave after their term?
  • Upload department endorsement signed by, e.g. Vice Chair
  • Dept Chair must still route parcel forward
Reminders

- Control Point still issues approval letter to candidate offline
  - Uploaded as “Decision Letter” when case is finalized
- Observe submission deadlines as outlined in Red Binder
  - Especially for 9/12 employees!
- ASMD: not technically a leave, but a modification of job duties
- FMLA: not a leave itself, but job protection
- Department analysts are responsible for verifying all aspects of the leave request (see next slide)
What should departments check for?

- Sabbatical Leaves (faculty)
  - Sabbatical credit usage and balance is correct
  - Request contains narrative addressing points in APM 740-94
  - In-Residence sabbatical is justified

- Validation of dates requested
  - Correct pay period dates for 9/9 or 9/12 employees
  - Leave does not exceed appointment end date
  - Enough sick/vacation/PTO to accommodate paid dates of leave

- Is the leave type within policy?
Admin Stipends

• 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
Outside Activities (APM-025)

• Category I prior approvals must be obtained before the leave can be approved
• 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
User Guide

• 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
  • Leave Request form (academic employees)
  • Resources for Department Analysts
New Extended Absence Report - Data Warehouse

- Data from Extended Absence module
- View dates, leave type and pay status
- Report Guide – field definitions and report overview (located under Resources for Dept. Analysts on AP Folio)

Coming Soon – Leave Report from Job Data
Contacts

• Leave Administration
  • UCPath  AP-Path@ucsb.edu
  • FML/Legal Leave Entitlements  AP-leave@ucsb.edu

• Lia Cabello  x 5979  lia.cabello@ucsb.edu
  • Humanities and Fine Arts, Social Sciences, Education, Creative Studies

• Helly Kwee  x 5428  helly.kwee@ucsb.edu
  • 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