CONVERTING VSL BALANCES

ACADEMIC PROFESSIONAL TO CS-EXEMPT
(CONVERTING WITHIN THE SAME UNIT)

Units should follow these steps to update PEALEAV and the VSL Application when an employee converts from an **Academic Professional (AP) position** to a **Civil Service-Exempt-75 Hr/Pay (CS-Exempt)** position <u>**within**</u> the same unit.

STEP 1: UNIT PEALEAV PROCESS

☐ Ensure employee submits all leave usage from the beginning of the current reporting year (August 16th) through the last day of employment as an AP, in the VSL application

☐ Verify supervisor has approved all AP usage in the VSL application

☐ No later than <u>**the last day**</u> of AP employment:

    ☐ Verify that the current reporting year's (08/16) starting balances in the Starting Balance box on the Setup Employees page in VSL match the *Begin Balance Hours* field on the AP position in PEALEAV for both VACA and SICK

    ☐ Manually calculate accruals from the beginning of the reporting year (08/16) through the end date of the AP position and verify accruals are accurate in the *Accrued Hours* field on the AP position in PEALEAV for both VACA and SICK

        • Please see the *Academic VSL-Partial Pay Period-Partial Year-Leave Accrual Calculator* for additional information on figuring accruals, if necessary.

    ☐ Update usage in PEALEAV with VACA and SICK usage from the beginning of the current reporting year (08/16) through the end date of the AP position:

        ☐ Use the last day of AP employment in the *Date Available* fields on the AP position for VACA, SICK and Floating Holiday. Please also report COVID emergency sick leave, if applicable

        ☐ Enter the total amount of leave reported in VSL in the *Taken Hours* fields on the AP position for VACA, SICK, Floating Holiday and COVID sick, if applicable

        ☐ Enter the following in the *Change Reason* fields: "*Updating leave usage for AP to CS conversion (your netid)*", **ensure you include your netid with change reason**

            o If there was no leave taken for a leave code enter the following in the *Change Reason* field: "*Updating leave usage for AP to CS conversion, no leave taken (your netid)*", **ensure you include your netid with change reason**

☐ Notify IHR (SHR-RECORDS@mx.uillinois.edu) that you have updated PEALEAV

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STEP 2: IHR PEALEAV PROCESS

☐ Once the final calc for the AP position is complete:

    ☐ Verify unit updated PEALEAV with usage information on previous AP position

    ☐ Convert balances in _Current Available hours_ field on previous AP position in PEALEAV from 8 hour/day balances to 7.5 hour/day balances

        • Calculation = _Current Available hours_/8*7.5 = CS-Exempt position _Begin Balance Hours_

    ☐ Update _Begin Balance Hours_ field on the new CS-Exempt position in PEALEAV with the converted balances, **include processor's netid with change reason**

        ☐ If the conversion from AP to CS-Exempt missed calc, update partial pay period accruals in the _Accrued Hours_ field on the new CS-Exempt position using the _CS-Exempt VSL-Partial Pay Period-Partial Year-Leave Accrual Calculator_.

    ☐ Zero out _Begin Balance Hours_, _Accrued Hours_, _Accrued Days_, _Taken Hours_, _Current Available Hours_ and _Current Available Days_ fields on the AP position

☐ Send employee, <u>copy new unit HR contact</u>, the Benefits Conversion letter within a week of the final pay calc for the AP position **OR** within a week of the unit updating the leave usage in PEALEAV, if the unit update happens after the final pay calc. (_Calc dates can be found on the <u>University of Illinois Payroll Schedules</u> in the "Job Change-System Cut-off* at 5pm" column_)

STEP 3: UNIT VSL APPLICATION PROCESS

☐ Receive Benefits Conversion letter from IHR with converted beginning balances for new CS-Exempt position

☐ Confirm these balances match the _Begin Balance Hours_ on the new CS-Exempt position in PEALEAV and all balance information has been zeroed out on the previous AP position, contact IHR (<u>SHR-RECORDS@mx.uillinois.edu</u>) if changes to converted balances are necessary

☐ Convert employee from AP to CS-Exempt in VSL, use the **<u>Add New User</u>** section:

    ☐ Enter employee's Username (netid)

    ☐ Enter balances from Benefits Conversion letter in the Initial Balances section

    ☐ Choose Civil Service Exempt (75 Hr/Pay) from Employee Group dropdown

    ☐ Enter the start date of the new CS-Exempt position in the Starting Date field, this is the date the employee should begin accruing leave at the CS-Exempt rate

    ☐ Verify appointment information is correct in the Appointment Details section

    ☐ Click Add User button

    ☐ Verify the Starting Balance box now shows CS-Exempt reporting period date and correct beginning balances

☐ Adjust floating holidays to 7.5 hours, if applicable, even if the event(s) were prior to conversion. If the event(s) are left at 8 hours the FH balance calculations will be incorrect. You may use the Balance Adjustment section on the Setup employees tab to make the adjustment from 8 hours to 7.5 hours using the date(s) the event(s) were originally reported

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☐ Adjust any future 8-hour vacation or sick leave events that were submitted prior to the conversion but take place after the conversion to 7.5 hours, if applicable. You may use the Balance Adjustment section on the Setup employees tab to make the adjustment from 8 hours to 7.5 hours using the date(s) the event(s) were originally reported

☐ Submit a negative balance adjustment, using the Balance Adjustment section on the Setup employees tab, to offset the VACA and SICK leave reported in PEALEAV as part of the balance conversion in Step 1. Do not do a negative adjustment for COVID sick or Floating Holidays

- This preserves the historical AP usage records, resets the usage to zero with the start of the CS-Exempt position and prevents double reporting during the May and/or August reporting periods
- Please review the below examples and details before proceeding

Example/Process:
- Employee converted from AP to CS-Exempt effective 10/16/2021
- Employee reported 16 hours of vacation and 12 hours of sick leave from 08/16/2021-10/15/2021 as an AP employee
  - These hours were reported in PEALEAV in Step 1 of the balance conversion process but should remain in VSL as part of the historical leave record, as shown in the example below:

Event summary (8/16/2021 - 8/15/2022)	
Leave Type	**Usage (hours)**
Vacation	16
Sick Leave	12

Admin Activity Log

Event detail (8/16/2021 - 8/15/2022)				
Date	**Hours**	**Type**	**Notes**	**Status**
8/25/2021	8.00	Sick Leave		A [A] [D] [X]
9/8/2021	8.00	Vacation		A [A] [D] [X]
9/9/2021	8.00	Vacation		A [A] [D] [X]
10/5/2021	4.00	Sick Leave		A [A] [D] [X]

- Use the Balance Adjustment section on the Setup employee tab to reset usage to zero:
  - Enter a date for the balance adjustment
    - Suggestion: If possible, use a weekend date close to the beginning of the new CS-Exempt appointment
    - Example: 10/16/21
  - Select type of leave from Type dropdown
    - Example: Vacation

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- o Enter a negative amount, in the Hours field, equal to the total amount of leave reported in PEALEAV in Step 1
  - ▪ Example: -16
- o Enter a descriptive note in the Notes field, there is a 30-character limit
  - ▪ Example: E-class conversion adjustment

Balance Adjustment	?

Date	Type	Hours
10/16/21	Vacation ⌄	-16

Notes

E-class conversi	Adjust

- Repeat the same process for sick leave, you must use a different date than the date used for the vacation adjustment

- The Usage (hours) column in the Event summary box should now show usage for each leave type as zero, as shown in the example below:

Event summary (8/22/2021 - 8/20/2022)

Leave Type	Usage (hours)
Vacation	0
Sick Leave	0

Admin Activity Log

Event detail (8/22/2021 - 8/20/2022)

Date	Hours	Type	Notes	Status
8/25/2021	8.00	Sick Leave		A [A] [D] [X]
9/8/2021	8.00	Vacation		A [A] [D] [X]
9/9/2021	8.00	Vacation		A [A] [D] [X]
10/5/2021	4.00	Sick Leave		A [A] [D] [X]
10/15/2021	-12.00	Sick Leave	E-class conversion adjustment	A [A] [D] [X]
10/16/2021	-16.00	Vacation	E-class conversion adjustment	A [A] [D] [X]

*Please note: if the employee reported future usage that wasn't reported in PEALEAV, as part of the conversion, that usage should still show in the Event Summary

- Usage reported going forward will be based on 7.5 Hr/Pay increments and only the usage reported from the beginning of the CS-Exempt position through the end of the reporting periods will transmit to PEALEAV during the May and August reporting periods