

CONVERTING VSL BALANCES

CS-EXEMPT TO ACADEMIC PROFESSIONAL (TRANSFERRING BETWEEN VSL UNITS)

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

STEP 1: UNIT (PREVIOUS UNIT) PEALEAV PROCESS

- Ensure employee submits all leave usage from the beginning of the current reporting year (August) through the last day of employment as CS-Exempt, in the VSL application
- Verify supervisor has approved all CS-Exempt usage in the VSL application
- No later than **the last day** of CS-Exempt employment:
 - Verify that the current reporting year's (August) starting balances in the Starting Balance box on the Setup Employee page in VSL match the *Begin Balance Hours* field on the CS-Exempt position in PEALEAV for both VACA and SICK
 - Manually calculate accruals from the beginning of the reporting year (August) through the end date of the CS-Exempt position and verify accruals are accurate in the *Accrued Hours* field on the CS-Exempt position in PEALEAV for both VACA and SICK
 - Please see the *CS-Exempt 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 (August) through the end date of the CS-Exempt position:
 - Use the last day of CS-Exempt employment in the *Date Available* fields on the CS-Exempt 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 CS-Exempt position for VACA, SICK, Floating Holiday and COVID sick, if applicable
 - Enter the following in the *Change Reason* fields: "*Updating leave usage for CS-Exempt to AP conversion (your netid)*", **ensure you include your netid with change reason**
 - If there was no leave taken for a leave code enter the following in the *Change Reason* field: "*Updating leave usage for CS-Exempt to AP 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

CONVERTING VSL BALANCES

STEP 2: UNIT 1 (PREVIOUS UNIT) VSL PROCESS

- Remove Approver(s) from employee's record on the Setup employees tab
- Submit a negative balance adjustment, using the Balance Adjustment section on the Setup employees tab, to offset the vacation 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 CS-Exempt usage records, resets the usage to zero with the start of the AP 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 CS-Exempt to AP effective 10/17/2021
- Employee reported 11.25 hours of vacation and 3.75 hours of sick leave from 08/22/2021-10/16/2021 as a CS-Exempt 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 record, as shown in the example below:

Event summary (8/22/2021 - 8/20/2022)				
Leave Type	Usage (hours)			
Vacation	11.25			
Sick Leave	3.75			
Floating	15			

Admin Activity Log

Event detail (8/22/2021 - 8/20/2022)				
Date	Hours	Type	Notes	Status
9/7/2021	7.50	Floating		A [A] [D] [X]
9/15/2021	3.75	Vacation		A [A] [D] [X]
9/16/2021	7.50	Floating		A [A] [D] [X]
9/17/2021	7.50	Vacation		A [A] [D] [X]
10/15/2021	3.75	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 appointment
 - Example: 10/17/21
 - Select type of leave from Type dropdown
 - Example: Vacation
 - Enter a negative amount in the Hours field, equal to the total amount of leave reported in PEALEAV in Step 1

CONVERTING VSL BALANCES

- Example: -11.25
- Enter a descriptive note in the Notes field, 30-character limit
 - Example: E-class conversion adjustment

- 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 (8/16/2021 - 8/15/2022)	
Leave Type	Usage (hours)
Vacation	0
Sick Leave	0
Floating	16

Admin Activity Log

Event detail (8/16/2021 - 8/15/2022)				
Date	Hours	Type	Notes	Status
9/7/2021	8.00	Floating	E-class conversion adjustment	A [A] [D] [X]
9/15/2021	3.75	Vacation		A [A] [D] [X]
9/16/2021	8.00	Floating	E-class conversion adjustment	A [A] [D] [X]
9/17/2021	7.50	Vacation		A [A] [D] [X]
10/15/2021	3.75	Sick Leave		A [A] [D] [X]
10/16/2021	-3.75	Sick Leave	E-class conversion adjustment	A [A] [D] [X]
10/17/2021	-11.25	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**

- Transfer record to the new unit by selecting the new unit in the Processing Unit dropdown then click Set Unit

CONVERTING VSL BALANCES

STEP 3: IHR PEALEAV PROCESS

- Once the final bi-weekly calc for the CS-Exempt position is complete:
 - Verify unit updated PEALEAV with usage information on previous CS-Exempt position
 - Convert balances in Current Available hours field on previous CS-Exempt position in PEALEAV from 7.5 hour/day balances to 8 hour/day balances
 - Update Begin Balance Hours field on the new AP position in PEALEAV with the converted balances, **include processor's netid with change reason**
 - If the conversion from CS-Exempt to AP missed calc, update partial pay period accruals in the Accrued Hours field on the new AP position using the *Academic 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 CS-Exempt position
- Send employee, copy new unit HR contact, the Benefits Conversion letter within a week of the final pay calc for the CS-Exempt 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 [University of Illinois Payroll Schedules](#) in the "Job Change-System Cut-off* at 5pm" column*)

STEP 4: UNIT (NEW UNIT) VSL APPLICATION PROCESS

- Receive Benefits Conversion letter from IHR with converted beginning balances for new AP position
- Confirm these balances match the Begin Balance Hours on the new AP position in PEALEAV and all balance information has been zeroed out on the previous CS-Exempt position, contact IHR (SHR-RECORDS@mx.uillinois.edu) if changes to converted balances are necessary
- Convert employee from CS-Exempt to AP in VSL, use the **Add New User** section:
 - Enter employee's Username (netid)
 - Enter balances from Benefits Conversion letter in the Initial Balances section
 - Choose Academic Professional from Employee Group dropdown
 - Enter the start date of the new AP position in the Starting Date field, this is the date the employee should begin accruing leave at the AP rate
 - Verify appointment information is correct in the Appointment Details section
 - Click Add User button
 - Verify the Starting Balance box now shows AP reporting period dates and correct beginning balances
- Adjust floating holidays to 8 hours, if applicable, even if the event(s) were prior to conversion. If the event(s) are left at 7.5 hours the FH balance calculation will be incorrect. You may use the Balance Adjustment section on the Setup employees tab to make the adjustment from 7.5 hours to 8 hours using the date(s) the event(s) were originally reported

CONVERTING VSL BALANCES

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

- Verify previous unit submitted a negative balance adjustment for CS-Exempt usage that was submitted in PEALEAV as part of the balance conversion process. If this was not completed by the previous unit, refer to Step 2 of this guide for instructions on how to complete this step.
 - It is extremely **important** this balance adjustment is made to prevent double reporting in May and August