TRANSFERRING EMPLOYEES BETWEEN VSL UNITS

ACADEMIC

Units should follow these steps to update PEALEAV and the VSL Application when an employee transfers to a new unit and remains in the same academic e-class.

**STEP 1: UNIT 1 (CURRENT/TERMINATING UNIT) PROCESS**

- Ensure employee submits all leave usage from the beginning of the current reporting year (August 16th) through the last day of employment in the current unit, in the VSL application.
- Verify supervisor has approved all usage for current position in the VSL application.
- No later than the last day of employment in the current unit:
  - 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 current (terminating) job in PEALEAV for both VACA and SICK.
    - If the beginning balances are incorrect update the hours in the *Begin Balance Hours* field in PEALEAV and/or VSL, as appropriate.
  - Manually calculate accruals from the beginning of the reporting year (08/16) through the end date of the current position and verify accruals are accurate in the *Accrued Hours* field on the current 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.
    - If the accruals are incorrect in PEALEAV please update the hours in the *Accrued Hours* field.
- **DO NOT** update usage in PEALEAV unless the transfer coincides with the May or August reporting periods.
- Remove Approver(s) from employee’s record on the Setup employees tab.
- Select new unit from Processing Unit dropdown and click “Set Unit” button.

- Please contact the new unit’s HR contact for assistance with the correct processing unit if you are uncertain.
- Please consult the HR Department Contacts list if you are uncertain who to contact.
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☐ Notify the new unit’s HR contact (HR Department Contacts), that the employee’s record has been transferred in VSL, include the following information:

- Confirm August beginning balances are correct in PEALEAV & VSL
- Confirm accruals from August through end date of current position are correct in PEALEAV
- If transferring the record during the May or August reporting periods indicate if the usage from 08/16-05/15 for May reporting or from 08/16-08/15 for August reporting has been reported in PEALEAV
  o DO NOT REPORT USAGE IN PEALEAV OUTSIDE OF THE MAY AND AUGUST REPORTING PERIODS

STEP 2: UNIT 2 (NEW UNIT) PEALEAV PROCESS

☐ Once the final calc for previous position is complete:

  ☐ Verify notice was received from previous unit confirming beginning balances/accruals are correct in PEALEAV and VSL
  ☐ Move hours from the Begin Balance Hours and Accrued Hours fields on the terminated academic position to the Begin Balance Hours and Accrued Hours fields on the new academic position in PEALEAV, include processor’s netid with change reason

- If the transaction missed calc update partial pay period accruals in the Accrued Hours field on the new academic job using the Academic VSL-Partial Pay Period-Partial Year-Leave Accrual Calculator
- If transferring the record during the May and August reporting periods and the previous unit indicates usage was reported on the old position move Taken Hours to new position, as well

  ☐ Zero out Begin Balance Hours, Accrued Hours, Accrued Days, Taken Hours, Current Available Hours, and Current Available Days fields on the terminated academic position

STEP 3: UNIT 2 (NEW UNIT) VSL APPLICATION PROCESS

☐ Once balances have been transferred to new position in PEALEAV:

  ☐ Confirm the Begin Balance Hours on the new academic position in PEALEAV match the (08/16) starting balances for the reporting year in the Starting Balance box on the Setup Employees page in VSL and all balance information has been zeroed out on the previous AP position
  ☐ Add new approver(s)
  ☐ Make changes to the Appointments section, ONLY if new position has a different %FTE, Period or Leave Accrual Types
  ☐ Review the Periodic Reporting, Weekend Submission, and FMLA sections to ensure they are consistent with the unit’s business practices and requirements of the position