



Leave Policy

Leave Policies are designed according to each district's local policy. Leave Policy Examples:

- Standard Leave Group
- Maintenance/Custodial
- Non-Eligible Employees

Leave Policies are assigned to an employee in Finance > HR > Staff Manager > Leave Policy Elections when initially entered into HR.

Leave Policies are designed to have multiple functions in the payroll process:

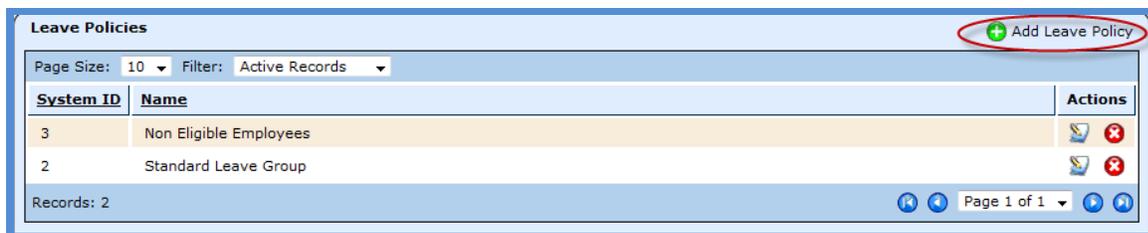
- **Accrual:** Leave Policies are created to accrue specified Leave Types to a group of employees for a particular time period such as by pay period or annually. Again, this is initially set up according to your local leave policy.
 - For example, this process simplifies accruing the state personal days and/or local days at the beginning of each school year.
- **Dock:** Leave Policies also contain the option to dock employee leave given entered criteria for Days of Grace, Days of Reduced Dock, Reduced Dock Method, and the Reduced Dock Rate.
 - For example, if an employee is absent due to FMLA reasons and district policy indicates that the employee shall be docked at a lower daily rate instead of his/her daily rate of pay, the information would be entered here.

Finance > HR > Leave > Leave Policies



Adding Leave Policy

Click  Add Leave Policy



System ID	Name	Actions
3	Non Eligible Employees	 
2	Standard Leave Group	 

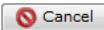
► **Name** – Enter the name of the leave policy

New Leave Policy

Leave policies allow you to define the manner in which leave is accrued and docked.

Identifier

Name*

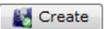
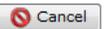
 

New Leave Policy

Leave policies allow you to define the manner in which leave is accrued and docked.

Identifier

Name*

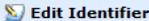
Click  **Create**

Click the **Configuration** tab

General **Configuration**

Edit: Transportation 

This view allows you to configure leave policies for governing the manner in which leave is accrued and docked.

Identifier 

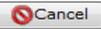
Name* Transportation

► **Effective Date** – Enter the effective date of the leave policy.

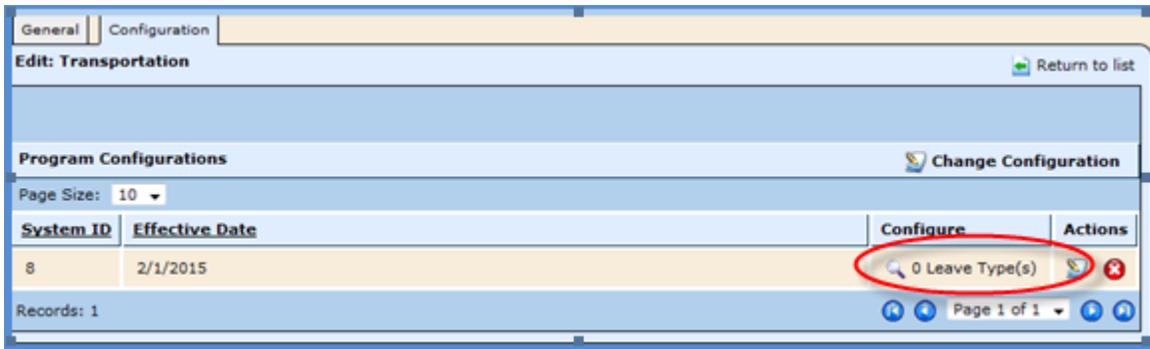
General Configuration

Edit: Transportation 

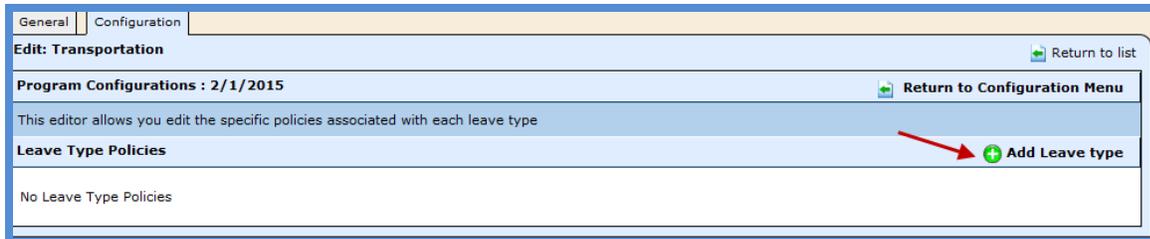
Program Configurations

Effective Date*   

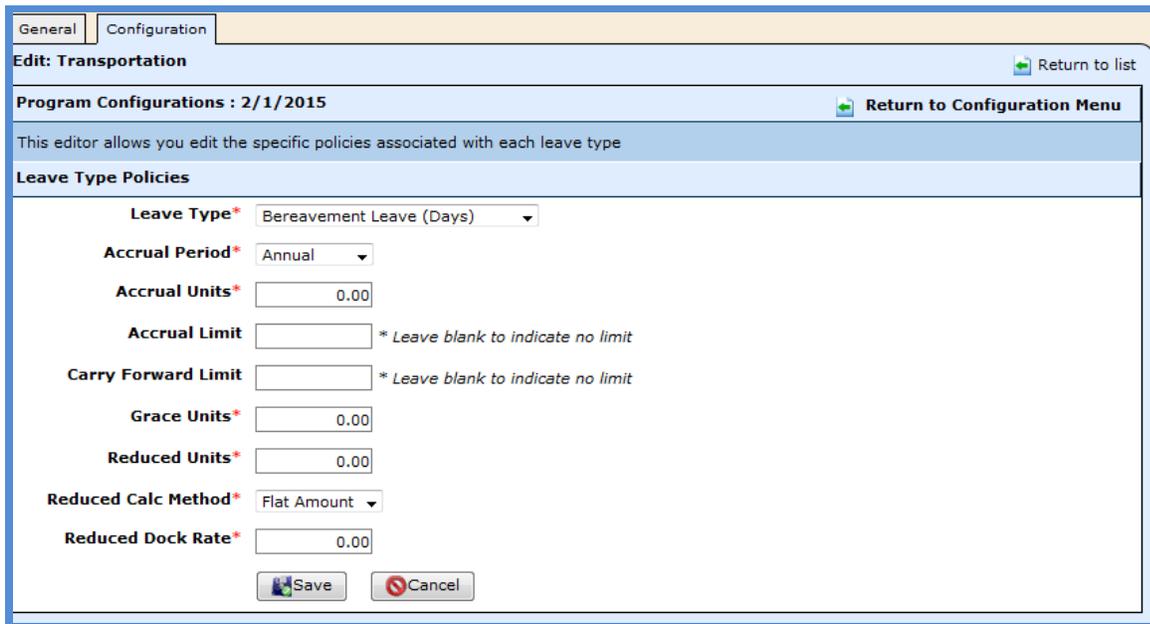
Click  **Save**



Click  **0 Leave Type(s)**



Click  **Add Leave Type**



- ▶ **Leave Type** - Select the leave form the drop down box
- ▶ **Accrual Period** -Select the accrual period from the drop down box
 - Annual - this option will accrue the Leave Type annually during the Promote Service Records process
 - By Pay Period - this option will accrue the Leave Type each pay period during the payroll process
- ▶ **Accrual Units** - Enter the accrual units for the period.
- ▶ **Accrual Limit** - Enter the accrual limit for the leave type or leave blank for no limit
- ▶ **Carry Forward Limit** - Enter the carry forward limit for the leave type or leave blank for no limit
- ▶ **Grace Units** - Enter the grace units of the leave if the policy allows days of grace before an employee is docked his/her full daily rate.
- ▶ **Reduced Units** - Enter the reduced units of the local leave if the policy allows days of reduced dock before an employee is docked his/her full daily rate.
- ▶ **Reduced Calc Method** - Select the reduced calc method from the drop down box choosing the flat amount or percentage method
- ▶ **Reduced Dock Rate** - Enter the reduced dock rate if local leave policy docks an employee at a reduced dock. For example, a school may dock at a reduced substitute rate rather than an employee's full daily rate

The screenshot shows a web-based configuration interface for 'Transportation'. The main title is 'Edit: Transportation' with a 'Return to list' link. Below it, it says 'Program Configurations : 2/1/2015' and 'Return to Configuration Menu'. A note states: 'This editor allows you edit the specific policies associated with each leave type'. The section is titled 'Leave Type Policies' and contains the following fields:

- Leave Type***: Personal Leave - 10 Month (Days) (dropdown)
- Accrual Period***: Annual (dropdown)
- Accrual Units***: 2.00 (text input)
- Accrual Limit**: 2.00 (text input) with a note: * Leave blank to indicate no limit
- Carry Forward Limit**: (text input) with a note: * Leave blank to indicate no limit
- Grace Units***: 0.00 (text input)
- Reduced Units***: 0.00 (text input)
- Reduced Calc Method***: Flat Amount (dropdown)
- Reduced Dock Rate***: 0.00 (text input)

At the bottom of the form are 'Save' and 'Cancel' buttons.

Click  Save

Leave Type	Accrual Policy	Carry Forward Limit	Grace Period	Reduced Dock Policy	Actions
Personal Leave - 10 Month	2.00 Days each year up to 2.00 total	No Limit	0.00 Days	0.00 Days	

Continue the same procedures until all appropriate leave is added to the policy.

Leave Type	Accrual Policy	Carry Forward Limit	Grace Period	Reduced Dock Policy	Actions
Personal Leave - 10 Month	2.00 Days each year up to 2.00 total	No Limit	0.00 Days	0.00 Days	
Bereavement	1.00 Days each year	No Limit	0.00 Days	0.00 Days	
Jury Duty	2.00 Days each year	No Limit	0.00 Days	0.00 Days	

Click **Return to Configuration Menu**

System ID	Effective Date	Configure	Actions
8	2/1/2015	3 Leave Type(s)	

number of leave types associated with the leave policy

System ID	Name	Actions
3	Non Eligible Employees	
2	Standard Leave Group	
7	Transportation	

Edit a Leave Policy

Click next to the leave policy that will be corrected.

Leave Policies + Add Leave Policy

Page Size: 10 Filter: Active Records

System ID	Name	Actions
12	Transportation	

Records: 11 Page 2 of 2

General | **Configuration**

Edit: Transportation Return to list

This view allows you to configure leave policies for governing the manner in which leave is accrued and docked.

Identifier Edit Identifier

Name* Transportation

Click **Edit Identifier**

General | Configuration | **Vendors »**

Edit: Transportation Return to list

This view allows you to configure leave policies for governing the manner in which leave is accrued and docked.

Identifier

Name*

Save

► **Name** – Correct the name if applicable.

Click **Save**

Click on the **Configuration** Tab

General | **Configuration**

Edit: Transportation Return to list

This view allows you to configure leave policies for governing the manner in which leave is accrued and docked.

Identifier Edit Identifier

Name* Transportation

Click to change the effective date of the leave policy

Edit: Transportation Return to list

Program Configurations Change Configuration

Page Size: 10

System ID	Effective Date	Configure	Actions
13	2/1/2015	3 Leave Type(s)	

Records: 1 Page 1 of 1

► **Effective Date** – Change the effective date of the policy if applicable

Edit: Transportation Return to list

Program Configurations

Effective Date*

Click Save

Click to edit the leave types within the leave policy.

This editor allows you edit the specific policies associated with each leave type

Leave Type Policies						+ Add Leave type
Leave Type	Accrual Policy	Carry Forward Limit	Grace Period	Reduced Dock Policy	Actions	
Personal Leave - 10 Month	2.00 Days each year up to 2.00 total	No Limit	0.00 Days	0.00 Days		
Bereavement	1.00 Days each year	No Limit	0.00 Days	0.00 Days		
Jury Duty	2.00 Days each year	No Limit	0.00 Days	0.00 Days		

Click on to Add another leave type to the policy and follow above steps.

This editor allows you edit the specific policies associated with each leave type

Leave Type Policies						Add Leave type
Leave Type	Accrual Policy	Carry Forward Limit	Grace Period	Reduced Dock Policy	Actions	
Personal Leave - 10 Month	2.00 Days each year up to 2.00 total	No Limit	0.00 Days	0.00 Days		
Bereavement	1.00 Days each year	No Limit	0.00 Days	0.00 Days		
Jury Duty	2.00 Days each year	No Limit	0.00 Days	0.00 Days		

Click next to the leave type to be corrected.

This editor allows you edit the specific policies associated with each leave type

Leave Type Policies						+ Add Leave type
Leave Type	Accrual Policy	Carry Forward Limit	Grace Period	Reduced Dock Policy	Actions	
Personal Leave - 10 Month	2.00 Days each year up to 2.00 total	No Limit	0.00 Days	0.00 Days		
Bereavement	1.00 Days each year	No Limit	0.00 Days	0.00 Days		
Jury Duty	2.00 Days each year	No Limit	0.00 Days	0.00 Days		

Program Configurations : 2/1/2015 IU

This editor allows you edit the specific policies associated with each leave type

Leave Type Policies

Leave Type* Jury Duty (Days) ▼

Accrual Period* Annual ▼

Accrual Units*

Accrual Limit * Leave blank to indicate no limit

Carry Forward Limit * Leave blank to indicate no limit

Grace Units*

Reduced Units*

Reduced Calc Method* Flat Amount ▼

Reduced Dock Rate*

►Correct the appropriate fields

Click Save



Delete a Leave Type

Click on to delete a leave type from the leave policy.

This editor allows you edit the specific policies associated with each leave type

Leave Type Policies						+ Add Leave type
Leave Type	Accrual Policy	Carry Forward Limit	Grace Period	Reduced Dock Policy	Actions	
Personal Leave - 10 Month	2.00 Days each year up to 2.00 total	No Limit	0.00 Days	0.00 Days		
Bereavement	1.00 Days each year	No Limit	0.00 Days	0.00 Days		
Jury Duty	2.00 Days each year	No Limit	0.00 Days	0.00 Days		

Program Configurations : 2/1/2015 Return to Configuration Menu

This editor allows you edit the specific policies associated with each leave type

Leave Type Policies + Add Leave type

Leave Type	Accrual Policy	Carry Forward Limit	Grace Period	Reduced Dock Policy	Actions
Personal Leave - 10 Month	2.00 Days each year up to 2.00 total	No Limit	0.00 Days	0.00 Days	
Bereavement	1.00 Days each year	No Limit	0.00 Days	0.00 Days	

Note: A red box highlights the 'Personal Leave - 10 Month' row with the text 'Jury duty removed'.

 **Delete a Leave Policy**

Click  next to the leave policy that will be deleted.

Leave Policies + Add Leave Policy

Page Size: 10 Filter: Active Records

System ID	Name	Actions
12	Transportation	

Records: 11 Page 2 of 2

Are you sure you want to delete this object?

Click **OK** to continue to delete the leave policy

 **Restore a deleted leave policy**

If a leave policy has been deleted but has never been used during a payroll process it will be permanently deleted.

If a leave policy has been used during one or more payroll processes then the deleted leave policy moves from the active records to disabled records. If this leave policy was deleted in error follow the below steps to restore the leave policy.

Active Records

System ID	Name	Actions
1	Default Leave Group	 
2	Fulltime Employee - 10 Month	 
9	Fulltime Employee - 11 Month	 
10	Fulltime Employee - 12 Month	 
5	Halftime Employee - 50% Time	 
8	Less Than Fulltime	 
3	Not Eligible for Leave	 
4	Parttime Employee - 75% Time	 
7	Personal Leave	 

Records: 9 Page 1 of 1

Disabled Records

System ID	Name	Actions
6	< Halftime Employee - 40%	

Records: 1 Page 1 of 1

Click on  to restore the leave policy to active.

Are you sure you want to restore this object?

Click **OK** to continue to restore the leave policy.

Leave Policies + Add Leave Policy

Page Size: 10 Filter: Disabled Records

System ID	Name	Actions
No Leave Policies Found		

Records: 0 Page 1 of 1

Restored to active records

Page Size: 10 Filter: Active Records

System ID	Name	Actions
6	< Halftime Employee - 40%	
1	Default Leave Group	
2	Fulltime Employee - 10 Month	
9	Fulltime Employee - 11 Month	
10	Fulltime Employee - 12 Month	
5	Halftime Employee - 50% Time	
8	Less Than Fulltime	
3	Not Eligible for Leave	
4	Parttime Employee - 75% Time	
7	Personal Leave	

Records: 10 Page 1 of 1