Faculty Leave Reporting and Payment of Substitutes Specifications – Version 9

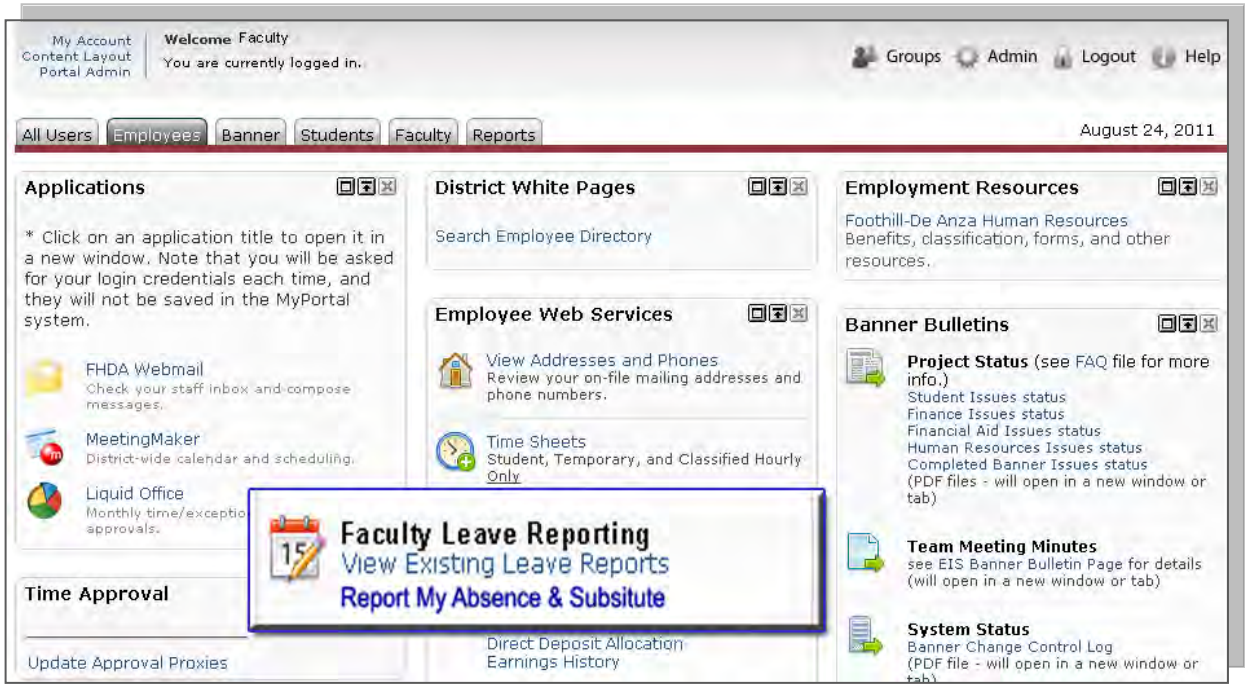
This facility will replace the current manual process initiated by completion of the Leave Report for Faculty and Payment of Substitutes form (S/N 23140 rev. 2008/05).

Objectives:

- **Use MyPortal to enter all data**
- **Allow reporting by the Faculty member or Division**
- **Mimic the manual process flow when possible (copy of paper form can be found at the end of this document)**
- **Use data validation and generation to minimize data entry errors**
- **Integrate with Banner Payroll and Human Resources systems**

Begin Reporting from Link on Employees tab:

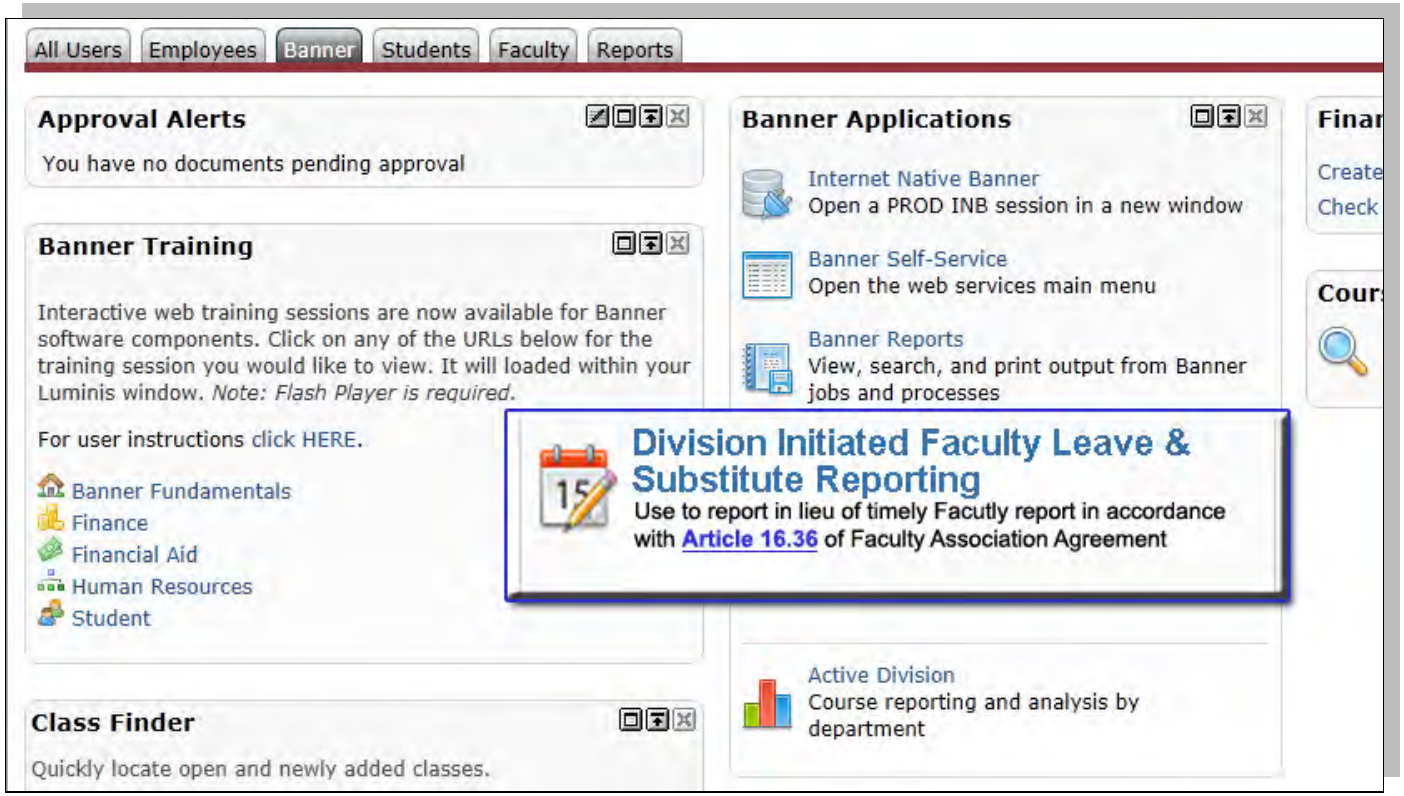
Item	Screen shot
1a	**Employee Tab Link**



Requirements:

- Link for Faculty to self-report will appear on the Employees tab for Faculty only.
- Clicking on the link will take Faculty to Step 3.
- Separate reports will be required if the classes on a given day are in two or more divisions, requiring approval from more than one dean.
- Full time faculty will be identified as having the employee codes F1, F2, F3 & F7. Part-time Faculty will be identified as having employee codes F4, F5, & F6.
- Each leave report will only list classes for one campus. Therefore part-time faculty who may teach classes on the same day on both campuses, must enter two Partial Day reports, one for each campus.

Item	Screen shot
1b	**Banner Tab Link for Division Entry**



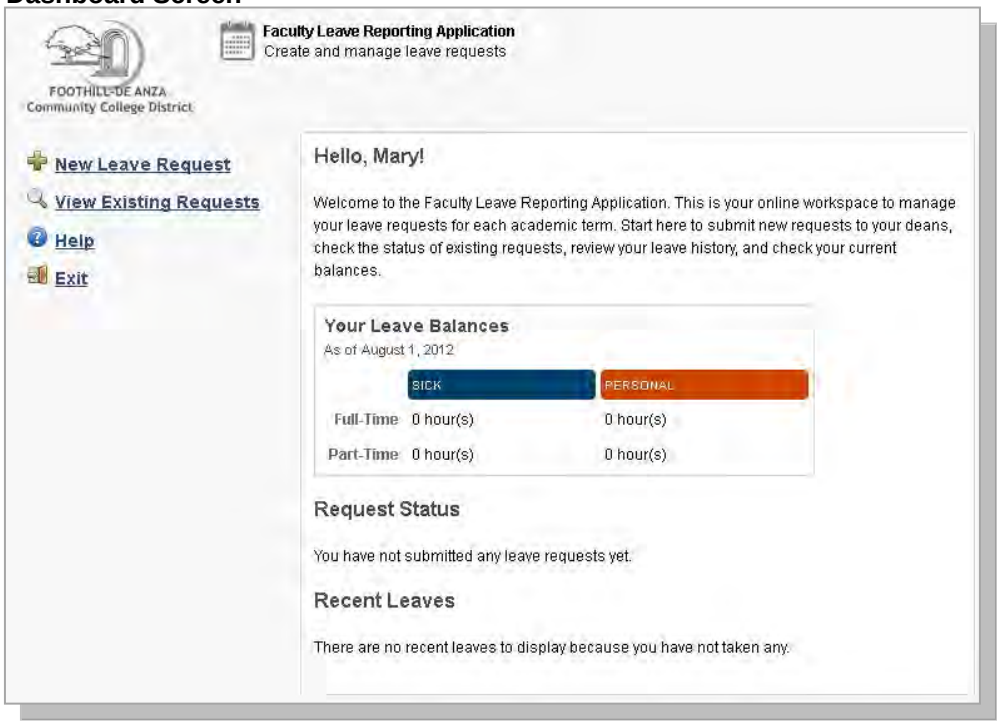
Requirements:

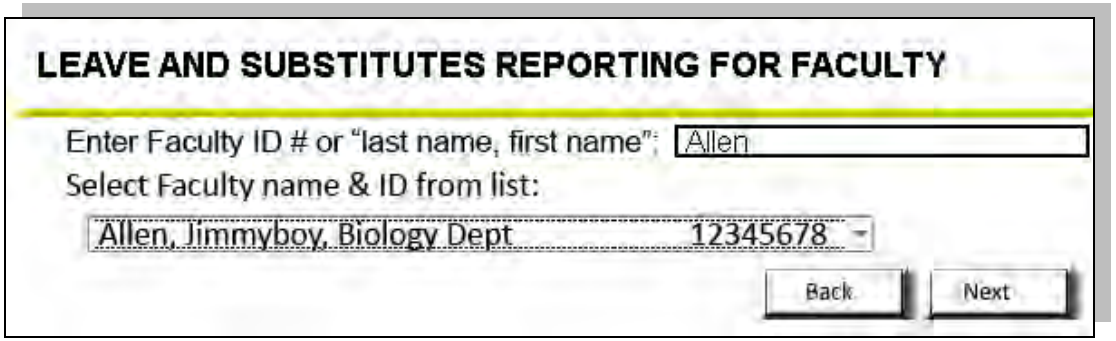
- Link for Divisions will display on the Banner tab and only for members of this group.
- Clicking on link will display Step 2 to select name of Faculty they are reporting for.
- Article 16.36 could be a link to text of article:

  "Leave Report

  16.36 It shall be the responsibility of each contract and regular faculty employee to notify his or her Division Dean or appropriate administrator when a leave is needed. Within 10 school days after returning from an absence each faculty employee shall sign and file a leave report for the absence, either via paper copy (provided by and submitted to the Division Dean or appropriate administrator) or through the District Portal, in accordance with whichever procedure is required by the District. In some cases, the Division office may initiate the leave report in order to facilitate timely payment for a substitute, if any, but such a leave report shall be subject to review by the faculty employee who may revise and re-submit the report before District action is taken on the leave report."
- List of Deans will be based on Position Codes. Deans will be responsible for identifying additional staff who should have access to link. This can be part of the Super-User view. Actually update to the system will be done by HR.

Item	Screen shot
1a	**Dashboard Screen**
2	**Reporting Leave for Faculty – Selecting Faculty name**

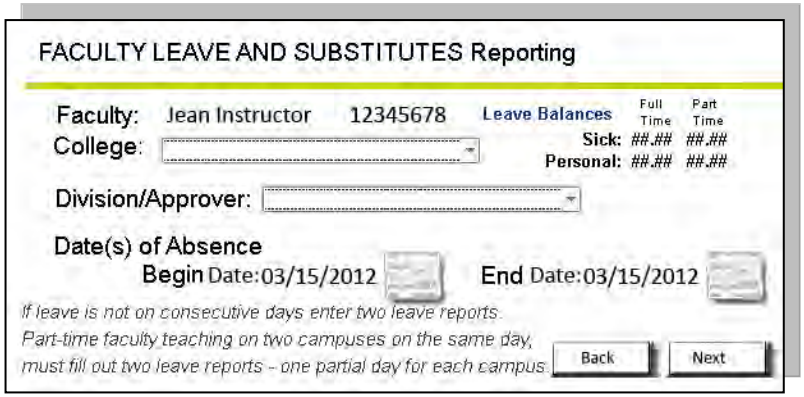




Requirements:

- A quick search will use either 8-digit CWID or name in the format of "LastName, FirstName"
- List box contains all active Faculty in alpha order. Include CWID & home organization
- If Next is clicked go to Step 3. If Back is selected go to Step 1b

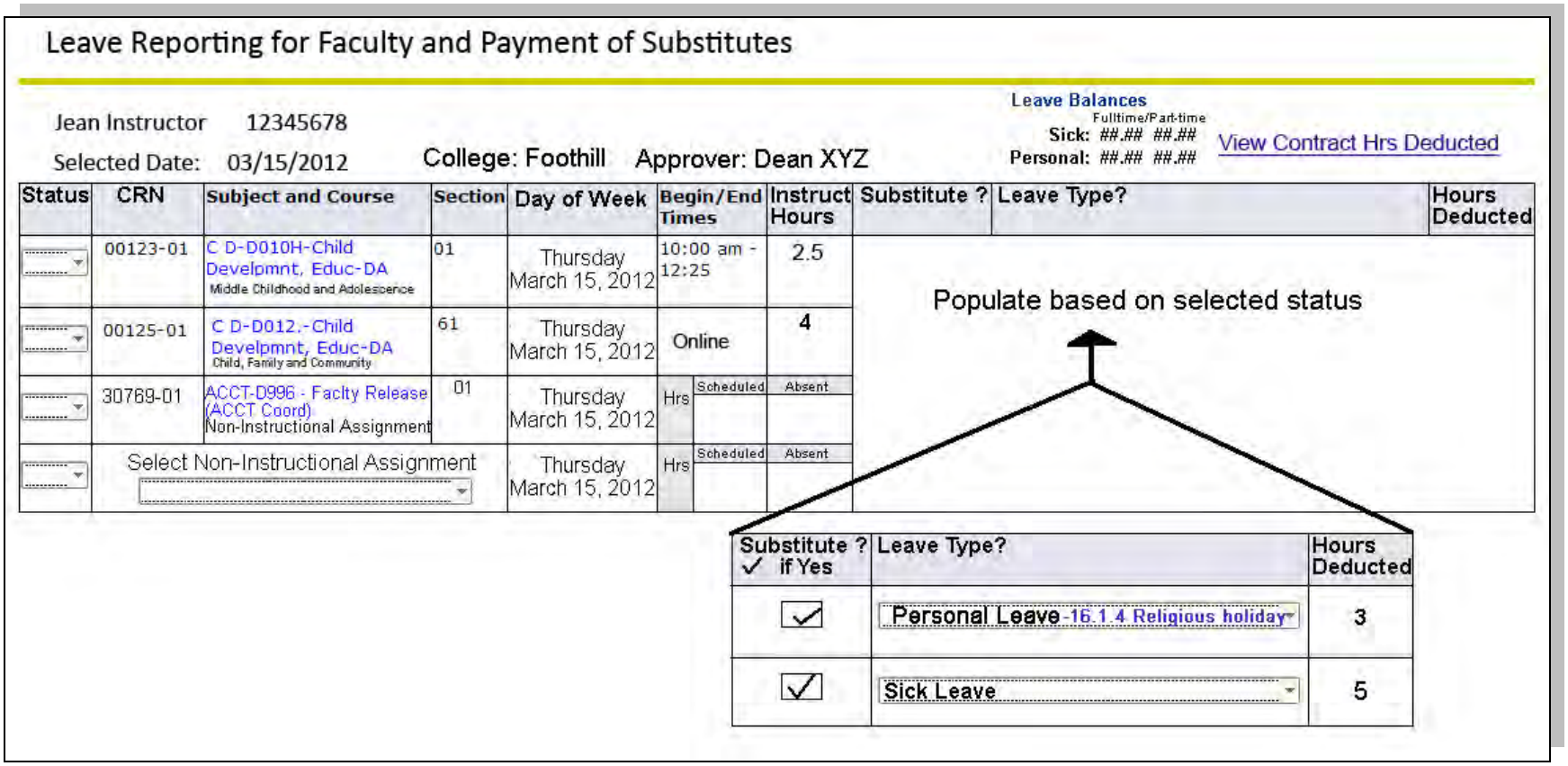
Item	Screen shot
3	**Reporting Days – Step 1: Choose Dates**



Requirements:

- Display CWID & Name for Faculty member who is signed into MyPortal.
- The user can retrieve the data saved during an earlier session by signing back in with the same leave date(s). All pending (not submitted for Approval) transactions will display.
- Display link to Leave Balances (same as on Employee tab) in another window.
- Select Campus.
- Select Division/Approver.
- Determine by date range if it is for more than one day.
- Include on-screen instructions for Faculty:
  - "If leave is not on consecutive days, enter two leave reports.
  - "Part-time faculty teaching on two campuses on the same day, must fill out two leave reports – each marked as partial day"
- If Next is clicked go to Step 4. If Back is selected go to Step 2 if it was the prior step. Otherwise go back to Employees tab.

Item	Screen shot
4	**Initial Screen for Reporting Days on Leave – Step 2: Select Courses**



This page contains the initial screen layout. The next page shows it as programed for the application.

FOOTHILL-DE ANZA Community College District

Faculty Leave Reporting Application
Create and manage leave requests

New Leave Request

Step 1 Choose Dates | **Step 2** Select Courses | **Step 3** Choose Substitutes | **Step 4** Confirm

Your Leave Balances
As of August 1, 2012

	SICK	PERSONAL
Full-Time	0 hour(s)	0 hour(s)
Part-Time	0 hour(s)	0 hour(s)

Instructor M[redacted]
Selected Date(s) June 4, 2012 to June 5, 2012
Home Foothill College
Division ARTS, Arts Division
Approver N/A

Monday, June 04, 2012

Course / Assignment	Begin End	Hours Scheduled	Hours Absent	Substitute?	Leave Type	Hours to Deduct
Partial-Day						
CRN 41408 ACCT D001A06 FINAN ACCOUNTNG I	09:30 AM - 11:20 AM	2	2	☑	Personal Leave: Attend Funeral	3.25
CRN 00019 ACCT D001B05 FINAN ACCOUNTG II	11:30 AM - 12:20 PM	1	0	☐		0
Non-Instructional Assignment: Additional Paid Assignment	N/A	2	1	☐	Personal Leave: Attend Funeral	1.5
					Total Hours to Deduct:	4.75

Tuesday, June 05, 2012

Course / Assignment	Begin End	Hours Scheduled	Hours Absent	Substitute?	Leave Type	Hours to Deduct
Full-Day						
CRN 00019 ACCT D001B05 FINAN ACCOUNTG II	11:30 AM - 12:20 PM	1	1	☑	Sick Leave: Full-Time	Full Day
Non-Instructional Assignment: Additional Paid Assignment	N/A	2	2	☐	Sick Leave: Full-Time	Full Day
					Total Hours to Deduct:	8

Leave Request Summary	
Projected Personal Leave Hours to Deduct:	4.25
Projected Full time Sick Leave Hours to Deduct:	8.0

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Requirements:

- Display a summary of leave balances (same as appears in Step 3).
- Display all classes scheduled for days selected, along with Faculty name, & CWID.
    - For each day selected in step 3 a line will display for
        - each class and/or non-instructional assignment (such as Counseling or Library)
            - Create a line entry for the following Non-Instructional Assignments found in SIASSGN table(the second tab – which appears to store in the table – SIRNIST)
                - CDC
                - Library
                - Counseling
                - Special Ed
        - For Online classes marked TBA, list the class on each day selected. In the times box enter "Online". For Instructional Hours enter the hours found in the X table.
        - Create one selection line for Non-Instructional Assignment with the following options in the drop-down box:
            - PT Office Hours;
                - Only available for Part-time faculty
                - Causes an unpaid leave transaction to be generated and sent to payroll for hours absent.
                - Leave bank hours can not be used to covered a part-time office hours absence.
            - Additional Pay Assignment
            - Paid Status
            - Other
    - When a range of days is entered, days within the range that do not have an assignment, will display only the line for Selecting a Non-Instructional Assignment.
    - Non-Instructional Assignments (both the ones with assignments in SIASSGN and selected from drop-down) will collect both the actual hours assigned to work and the hours absent (see example above).
- Link will display formula and Reference Appendix F of Faculty Agreement but will not display
- Status drop-down selection list will results in the following actions based on the condition

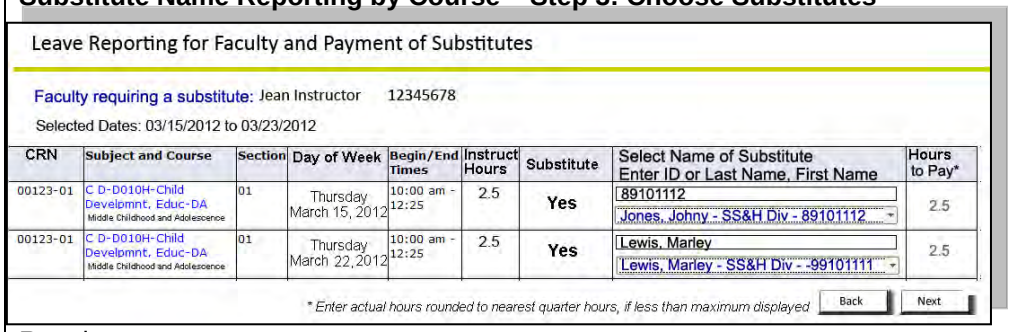
Status Selected	**FT**	**PT**	**Action if Selected**
Absent Partial Day	X	X	Display Leave type selector and Substitute buttons with Yes turned on for current line only*
		X	Post Hours Deducted on line = instructional hours
	X		Post Hours Deducted when day's entries are completed
Absent Full Day	X	X	Display Leave type selector and Substitute buttons with Yes turned on for every assignment on day*
		X	Post Hours Deducted on line = instructional hours
	X		Calculate and post leave hours per assignment = 8 hours for day
Teaching Partial Day	X	X	Do not change display

- The default setting for Substitute button is yes.
- For Full-time faculty, if a range of days is selected, only the first and last day of the range can be partial days. All other days in the range will default to Full days and 8 hours will be charged toward Paid Status for days that they do not have a teaching assignment.
- Leave type list box will contain:
    - Sick Leave - Selection of Sick Leave for five days or more will trigger popup window with: "Reminder - Doctor's note is required and should be delivered to Campus Payroll". Division will be able to contact Campus Payroll to verify receipt prior to approval. Earnings code is 180 for Full-time Faculty, 181 for Part-time Faculty and 182 during the summer.
    - Personal Leave - 16.1.1 Emergency, Personal Leave - 16.1.2 Personal business (do not allow part-time faculty to select), Personal

Leave -16.1.3 Judicial requirements, Personal Leave -16.1.4 Religious holiday, Personal Leave -16.1.5 Professional conference, Personal Leave -16.1.6 Attend funeral, Personal Leave -16.1.7 Natural disaster The earnings code is 300.
  - Unpaid Leave – The earnings code is 420.
  - Bereavement Leave - spouse, Bereavement Leave - parent, Bereavement Leave - son, Bereavement Leave - daughter, Bereavement Leave - sister, Bereavement Leave - brother, Bereavement Leave - grandchild, Bereavement Leave - grandparent, Bereavement Leave - domestic partner, Bereavement Leave - parent-in-law, Bereavement Leave - foster parent, Bereavement Leave - step parent, Bereavement Leave - foster child, Bereavement Leave - sister-in-law, Bereavement Leave - brother-in-law and Bereavement Leave - "any other person living in the immediate household of the employee" The earnings code is 240.
  - Jury Duty – the earnings code is 260.
  - Workers Compensation – the earnings code is 255. These transactions must be approved by Christine Vo.
  - College Assigned Business – Selection will trigger pop-up window with: "Warning – All College Assigned Business must be pre-approved." There is no earnings code – do not report. Use leave code CAB.
  - Faculty Flex Day – for Full time faculty only. (Article 27) There is no earnings code – do not report. Use leave code FFD.
- For Non-Instructional Assignments:
  - If Full Day is checked, Hours will populate with 8 Hours.
  - If Partial Day is checked, Faculty <u>will enter a number</u> less than 8, to the nearest quarter hour.
  - The Substitute box will not be checked as a default.
  - The Non-Instructional Assignment drop-down will contain: PT Office Hours, Paid Status and Other
    - If Part-time Office hours is selected then the Leave type will be set to Unpaid Leave and Leave Hours Deducted will be set to 0.
  - Leave type drop-down list will contain the same options as found in Step 4.
  - Once Leave Type is selected, Hours deducted will be populated.
  - If hours selected exceed balance in leave bank, display error message: "Warning, your x (sick or personal) leave hours exceed current balance. Excess leave will be processed as Unpaid Leave."
- If Leave Deducted exceeds leave bank for leave type selected, only deduct the actual hours as Unpaid Leave. This may be adjusted manually by payroll at a later date. For example an instructor who has 3 hrs of sick leave, teaches a 2 hour class and a 3 hour class is sick and absent for the full day will have 3 hours deducted from his sick leave and then charged for two hours of unpaid leave. If he/she had 4 hour of sick time he would be charged for 1 hour of unpaid leave. If he/she had 5 hours of sick leave, no unpaid leave would be charged.
- If hours selected exceed balance in leave bank, display error message: "Warning, your x (sick or personal) leave hours exceed current balance. Excess leave will be processed as Unpaid Leave." In this case actual hours are used rather than Appendix F calculation.
- If Full Day is selected, 8 hours will be deducted.
- If the Substitute box is checked, present pop-up window to collect Substitute Name (see Step 6)
- When <u>Next</u> is clicked,
  - If a substitute is indicated, "Next:" will take the user to step #5 to select a substitute. (If there is no substitute, "Next" will take the user to Step 7.
  - If the Division or faculty member has completed step 4 with no substitute and clicks on "Next", if there are no errors, "Next" should take the user to step #7
  - Display error message
    - If Leave type is not selected
    - If Full Day or Partial Day is not checked for date selected in Step 3
    - If the Substitute Box was checked, but substitute detail information was not reported in Step 5
- The <u>Save</u> button will cause the screen data to be saved and the user can leave the application. The user can retrieve the data by signing back in with the same leave date(s) The <u>Back</u> button will take the user back to Step 3. Save means they have not completed the form and want to come back to it later. They are not yet ready to submit. The user could then go back to the MyPortal tab, close the browser window or walk

	away from system. If they stop and come back later, they can continue if the app has not timed-out and if it did time out the work they did was saved.

Item	Screen shot
5	**Substitute Name Reporting by Course – Step 3: Choose Substitutes**



Leave Reporting for Faculty and Payment of Substitutes

Faculty requiring a substitute: Jean Instructor 12345678

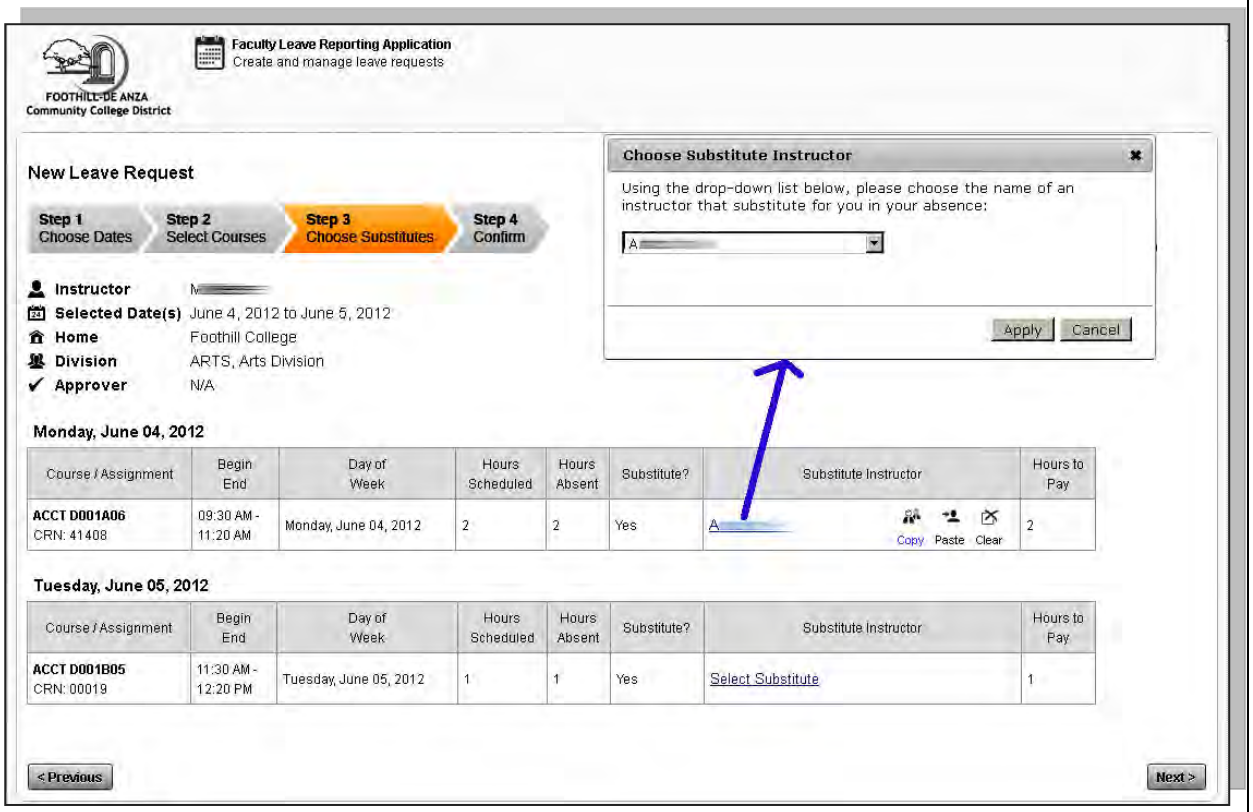
Selected Dates: 03/15/2012 to 03/23/2012

CRN	Subject and Course	Section	Day of Week	Begin/End Times	Instruct Hours	Substitute	Select Name of Substitute Enter ID or Last Name, First Name	Hours to Pay*
00123-01	C D-D010H-Child Developmnt, Educ-DA Middle Childhood and Adolescence	01	Thursday March 15, 2012	10:00 am - 12:25	2.5	Yes	89101112 Jones, Johny - SS&H Div - 89101112	2.5
00123-01	C D-D010H-Child Developmnt, Educ-DA Middle Childhood and Adolescence	01	Thursday March 22, 2012	10:00 am - 12:25	2.5	Yes	Lewis, Marley Lewis, Marley - SS&H Div - -99101111	2.5

* Enter actual hours rounded to nearest quarter hours, if less than maximum displayed Back Next

Requirements:

- A line item will appear for each class with the Substitute box checked.
- A quick search will use either 8-digit CWID or name in the format of "LastName, FirstName"
- The list of possible substitutes will contain all active faculty and include home location and CWID.
- The "Hours to Pay" will display the maximum number of hours the sub can be paid for. Faculty can enter a smaller number if the substitute only worked for part of the class. Entering more than the Instructional hours will generate an error message and will revert to Instructional hours. Entry should be rounded to the nearest quarter hour.
- Next button will produce an error message if a Substitute has not been selected. Otherwise the data will be saved and the user returns to Step 4.
- Back button will return user to Step 4 without saving the data. For example in the scenario above, if substitute was selected in error for Thursday, March 15, 2012, the Back button will allow the user to change the Yes to No for Substitute question.



FOOTHILL-DE ANZA Community College District

Faculty Leave Reporting Application
Create and manage leave requests

New Leave Request

Step 1 Choose Dates | Step 2 Select Courses | Step 3 Choose Substitutes | Step 4 Confirm

Instructor M
Selected Date(s) June 4, 2012 to June 5, 2012
Home Foothill College
Division ARTS, Arts Division
Approver N/A

Choose Substitute Instructor

Using the drop-down list below, please choose the name of an instructor that substitute for you in your absence:

A

Apply Cancel

Monday, June 04, 2012

Course / Assignment	Begin End	Day of Week	Hours Scheduled	Hours Absent	Substitute?	Substitute Instructor	Hours to Pay
ACCT D001A06 CRN: 41408	09:30 AM - 11:20 AM	Monday, June 04, 2012	2	2	Yes	A Copy Paste Clear	2

Tuesday, June 05, 2012

Course / Assignment	Begin End	Day of Week	Hours Scheduled	Hours Absent	Substitute?	Substitute Instructor	Hours to Pay
ACCT D001B05 CRN: 00019	11:30 AM - 12:20 PM	Tuesday, June 05, 2012	1	1	Yes	Select Substitute	1

< Previous Next >

Item	Screen shot
6	**Link to View Contract Hours Deducted** Copies of the Faculty Agreement that address Faculty Leave: 16.1 Under the circumstances specified herein, the President or his or her designee may grant a full-time contract or regular faculty employee who has been employed by the District for at least one month, up to five days of paid personal necessity leave per academic year; however, no more than two days of personal necessity leave may be used during the first six months of employment. For the purposes of this section, "personal necessity" means obligations or unavoidable duties of an employee that must be performed during scheduled working hours involving: 16.1.1 Emergencies related to the faculty employee's home or to his or her immediate family members; 16.1.2 Appointments for the purpose of conducting personal legal affairs or financial transactions that cannot be conducted outside of working hours; 16.1.3 Receipt of a summons, subpoena or other judicial order requiring absence from work; 16.1.4 Observance of a major religious holiday of the employee's faith; 16.1.5 Attendance at professional conferences related to the teaching profession and/or one's area of assignment; 16.1.6 Attendance at a funeral service; 16.1.7 Natural disasters that prevent a faculty employee from meeting all or part of his/her assigned duties; and 16.1.8 Attendance at activities related to a federal holiday (such as Veterans Day). 16.3 Eight hours of leave shall be deducted for a day's absence on personal necessity leave regardless of the actual duty hours of that day. If a contract or regular faculty employee requests and is granted personal necessity leave for less than a full day, he or she shall be charged personal necessity leave as specified in Appendix F, but personal necessity leave shall not be granted in increments of less than one hour. 16.16 Eight hours of leave shall be deducted for a day's absence because of illness or injury. If a faculty employee is absent because of illness or injury for less than a full day, sick leave shall be deducted as specified in Appendix F. Sick leave shall be recorded on the leave report forms required by Section 16.36.

Item	Screen shot
7	**Submit Screen – Step 4: Confirm**

Leave Reporting for Faculty and Payment of Substitutes

Jean Instructor 12345678 Campus: De Anza View FA Contract Appendix F

Selected Date: 03/15/2012 Approver: Jones, Johny - SS&H Div

Leave Balances Full Time Part Time
Sick: ##.## ##.##
Personal: ##.## ##.##

Status Selected	CRN	Subject and Course	Section	Day of Week	Begin/End Times	Instruct Hours	Substitute ?	Leave Type?	Leave Hrs Deducted
Absent Partial Day	00123-01	C D-D010H-Child Develpmnt, Educ-DA Middle Childhood and Adolescence	01	Thursday March 15, 2012	10:00 am - 12:25	2.5	Yes	Sick Leave	3
Absent Partial Day	Part-time Office Hours			Thursday March 15, 2012		1	No	Unpaid Leave	0

Make Corrections Submit Cancel

Requirements

- Approver Selected in Step 3 will display
- All selected & calculated data will display. Note hours to pay substitute for, may be less than Instructional hours if changed in step 5.
- "Make Corrections" button will take the user back to Step 4 and display screen as it appeared when the "Next" button was clicked.
- "Submit" button will
  - Faculty is completing the form
    - Save the entries as displayed.
    - Submit button will display "Documentation Required Warning message when leave types listed below are selected"
      - Sick Leave – "for five or more consecutive school days or who is absent from an assignment as defined in Article 7.15.1 for five or more consecutive hours of the assignment or who is absent from scheduled duties on a regular and repeated basis, shall, at the request of the Board, submit a statement from his or her physician or other qualified practitioner stating the medical reason for the absence and certifying the employee's ability to return to work."
      - Jury Duty - Verification of jury duty (summons or court statement)
    - Send E-mail to Approver that pending Faculty Leave & Substitutes Report is waiting their approval on Banner tab.
  - Division is completing the form
    - Send E-mail to Faculty that leave report was created (copy included in e-mail) and they must reply to e-mail with approval and/or comments with in three Working days. No reply will constitute agreement. Faculty can retrieve the entries by entering the same dates in Step 1 on the Employees tab.
- "Cancel" button will display a warning message (Are you sure you want to cancel this report?) which when answered Yes, will cause the report to be removed. A No answer will return the user to submit screen above.

	(Note: Faculty Association Agreement refers to: 1.1.22 “Contract day” means any day during the annual contract of a regular or contract faculty employee. The annual contract is comprised of 175 days for ten-month faculty, 195 days for eleven-month faculty, and 215 days for twelve-month faculty. 1.1.27 “School day” means any day when the colleges are in session during the regular academic year. 1.1.28 “Working day” means any day during which the central administrative offices of the District are open for business.)

Item	Screen shot
8	

Super User View

Facility that will allow ETS, HR and Payroll to monitor transactions in system.

Requirements:

- Selecting a Faculty and Absence Report will display report at seen in Step 4.
- This is view only. If an error is identified, the Faculty member should be contacted. Faculty will then correct error using the link in Step 3 and entering the same date or date range.
- View will display all data associated with the selected transaction, including location in workflow.
- Payroll Audit button will link to a report which displays all transactions which have not been processed by payroll. We may want to control who is able to see/click the Payroll Audit button. The report will be a spreadsheet which will contain the following items:

Absent Faculty's CWID
Last, First Name
Start Date of Leave
End Date of Leave
Position # and suffix
FT/PT/overload indicator
Leave code/type
Leave supplemental information
Instructional hours
Hours to be deducted/posted
Total Taken/Leave Balance Total
Current Available/Leave Balance Total
Sub's CWID
Sub's last, first name
Sub's position # and suffix
Sub's dates
Sub's hours
Sub's rate of pay
Sub's default earnings code
Date of approval
Approver's CWID
Approver's last, first name

- Payroll will be able to able to act on transactions under the following conditions:
  - Problem with transaction - mark as rejected, add comment and notify division that the transactions needs to be resubmitted.
  - Concurrent Leave (when faculty teaches on both campuses on the same day and are being charged double leave) – override to enter correct hours to be ducted and add comment documenting action.
  - Duplicate Entries – reject duplicate transaction and add comment documenting action.

Item	Screen shot

9

Report Ready for Approval

Faculty Leave Ready for Approval will take the approver to step 10

10

Approver List of Pending Faculty Leave and Substitute Reports for Approval

Faculty Member	Start Date of Leave	End Date of Leave	Substitute Yes/No/Hrs Paid	Leave Type / Hours	Action
Jane Doe -12345678	3/15/2012	3/15/2012	No	Sick Leave – 8 hrs	Approve View
Jim Ray - 12345678	3/1/2012	3/10/2012	Yes Paid for 20 hrs	Personal Leave - 16.1.2 Personal business – 2 hrs Bereavement Leave – parent – 8 hrs Jury Duty – 40 hrs	Approve View
Steve Me -1234578	3/1/2012	3/1/2012	Yes Paid for 5 hrs	Personal Leave -16.1.4 Religious holiday – 5 hrs	Approve View
Lois Vu - 12345678	1/5/2012	1/5/2012	Yes Paid for 2 hrs	Unpaid Leave – 8 hrs	Approve View

- Dean must click View to view the detail including substitute information
- May want to only allow the Dean to approve from this screen one day leaves without a substitute. In all other cases the Approve button would be grayed out.
- Division initiated leave reports will only appear on this list after the Division clicks the Submit button on step 7 (Submit Screen).
- This list could be displayed on the Approval Alerts channel.
- Clicking View will take approver to step 11

Item	Screen shot
11	**Approver Screen Detail**

Approver Screen Leave Reporting for Faculty and Payment of Substitutes

Faculty: Jean Instructor 12345678 Campus: De Anza

Leave Date: 03/15/2012 **Partial Day** Approver: Dean Martin, CDEV Div

View FA Contract Appendix F

Leave Balances	Full Time	Part Time
Sick:	##.##	##.##
Personal:	##.##	##.##

CRN	Subject and Course	Section	Day of Week	Begin/End Times	Instruct Hours	Substitute	Leave Type	Leave Hrs Deducted
00123-01	C D-D010H-Child Develpmnt, Educ-DA Middle Childhood and Adolescence	01	Thursday March 15, 2012	10:00 am - 12:25	2.5	Jones, Johny SS&H Div 89101112	Personal Leave 16.1.7 Natural Disaster	3

Date: 03/20/2012 **Full Day**

CRN	Subject and Course	Section	Day of Week	Begin/End Times	Instruct Hours	Substitute	Leave Type	Leave Hrs Deducted
00123-01	C D-D010H-Child Develpmnt, Educ-DA Middle Childhood and Adolescence	01	Tuesday March 20, 2012	10:00 am - 12:25	2.5	Jones, Johny SS&H Div 89101112	Sick Leave	3
00125-01	C D-D012.-Child Develpmnt, Educ-DA Child, Family and Community	61	Tuesday March 20, 2012	6:00 pm - 9:45	4	Jones, Johny SS&H Div 89101112	Sick Leave	5

Date: 03/22/2012 **Partial Day**

CRN	Subject and Course	Section	Day of Week	Begin/End Times	Instruct Hours	Substitute	Leave Type	Leave Hrs Deducted
00123-01	C D-D010H-Child Develpmnt, Educ-DA Middle Childhood and Adolescence	01	Thursday March 22, 2012	10:00 am - 12:25	2.5	Jones, Johny SS&H Div 89101112	Bereavement Relationship: Brother	0

Approval Date: April 1, 2012 Comments: (required if report is rejected)

Reject Approve Back

- Reject
  - Button will cause the leave report to return to the pending state, prompt for comment if none entered.
  - Send e-mail to submitter that report for selected date needs corrections. E-Mail title: "Alert Leave Report Returned – Your Immediate Attention Required". Submitter will access the returned leave report by going to Step 1 and entering the date(s) with a problem. E-mail should include comments.
  - Takes approver to next leave report waiting approval
- Comments are intended to explain a rejected leave report. If the Reject button is selected and Comments is blank, an error message

should display stating that "A comment is required explaining why the leave report has been rejected."

- Approve will cause all data on screen to be processed:
  - Triggering e-mail to faculty and substitute that leave for date(s) has been approved.
  - Transaction sent to Payroll to deduct from leave banks for faculty
  - If there is a substitute, transaction to create assignment and pay substitute sent to payroll for processing.
  - If report includes any unpaid leaves, transactions are created and sent to payroll for processing.
  - Takes approver to next leave report waiting approval
  - Trigger creation of the job assignment for substitute.
    - Rules for job assignment creation:
      - Payroll cut off day is the 15th of each month.
      - Personnel Date from Job Detail form (NBRJOBS_PERS_CHG_DATE) will always be the actual first day that the substitute worked
      - Account from Labor Distribution form (NBRJLBD_ACCT_CODE) will always be 1330 for a substitute.
      - Job Type on Base Job form (NBRBJOB_CONTRACT_TYPE) will be "Secondary" unless it is the first assignment for the term when it will be "Primary"
      - Position Code (NBRBJOB_POSN) is six character alpha-numeric. First 5 digits represent academic year and quarter (20123 = Winter quarter 2012). Last digit is an A for De Anza and H for Foothill.

		Substitute Start Date	Current Month		Prior Month(s)	
		Division Approval Date	1st to 15th	16th to end of mth	1st to 15th	16th to end of mth
Field Name	**INB Form**	**Table/Field**				
Begin Date	Base Job	NBRBJOB_BEGIN_DATE	1st day current mth	1st day next mth	1st day current mth	1st day next mth
Effective Date	Default Earnings	NBREARN_EFFECTIVE_DATE				
Effective Date	Job Detail	NBRJOBS_EFFECTIVE_DATE				
Effective Date	Labor Distribution	NBRJLBD_EFFECTIVE_DATE				
End Date	Base Job	NBRBJOB_END_DATE	last day current mth	last day next mth	last day current mth	last day next mth
Ended as of Date	Default Earnings	NBREARN.CANCEL_DATE*	1st day next mth or blank	1st day next mth	1st day next mth	1st day of mth after next
Earnings Code	Default Earnings	NBREARN_EARN_CODE	13	500	500	500

* Insert 2 records in NBREARN: 1 with effective date of the month to be paid (use NBRJOBS_EFFECTIVE_DATE) with ACTIVE_IND = 'Y'
Second record with effective date of the 1st of the next mont with ACTIVE_IND = 'N' so it will set this date on 'Ended as of Date' in NBAJOBS detail job.

- Back will return the approver to step 10, list of leaves awaiting approval

Item	Screen shot
12	**Division Status Report** This report will be an ARGOS report and available at any time on the Reports Tab in MyPortal. When transactions are processed by Payroll, they will appear on Audit report and drop off of the status report. This report will be accessed by Division Deans, Division Administrative Assistants, College & District Payroll, and College & District HR. It will be the divisions' responsibility to monitor reports returned to Faculty for corrections.

Faculty Leave and Substitute Pay Status Report

Date Report Run: mm/dd/yyyy
Division: x----------x

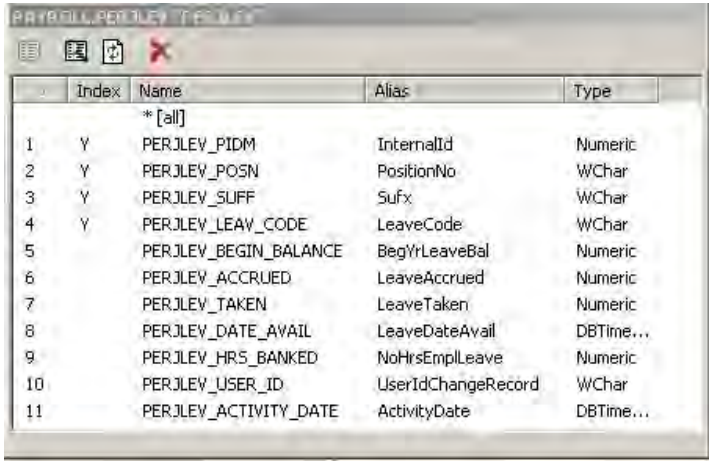
Faculty Member	Start Date of Leave	End Date of Leave	Date Submitted	Date Returned	Date Approved	Substitute	Leave Type	Status
Jane Doe	3/15/2012	3/15/2012	3/20/2012		3/20/2012	None	Sick Leave	Sent to Payroll
Jim Ray 12345678	3/1/2012	3/10/2012	3/25/2012	3/30/2012		Jim Howard 12345678	Personal Leave - 16.1.2 Personal business Bereavement Leave – parent Jury Duty	Returned for Correction
Steve Me 12345678	3/1/2012	3/1/2012	3/20/2012*			Howard Jim 12345678	Personal Leave -16.1.4 Religious holiday	Pending Faculty Review
Lois Vu 12345678	1/5/2012	1/5/2012	3/15/2012*			None	Unpaid Leave	Awaiting Approval

*Submitted by Division

Item	Screen shot
13	**Payroll Processing Specification**

- Leaves are currently posted to the Faculty's leave balance using the form PEALEAV where the instructor is selected and then a new leave balance is entered in the table PERJLEV
- Assignment type can be found in SIAASGN and can be used to determine is assignment is full or part time.
    - The leave codes used in Banner for Faculty are:

Leave Code	Description	Assignment Type	Full Time	Part Time
PLV	Personal Leave	0	X	
PTPL	Part time Personal Leave	2 or 4		X
PTSL	Part time Sick Leave	2 or 4		X
SICK	Sick Leave	0	X	
SUPL	Summer Personal Leave	2 or 4		X
SUSL	Summer Sick Leave	2 or 4		X



	Index	Name	Alias	Type
		* [all]		
1	Y	PERJLEV_PIDM	InternalId	Numeric
2	Y	PERJLEV_POSN	PositionNo	WChar
3	Y	PERJLEV_SUFF	Sufx	WChar
4	Y	PERJLEV_LEAV_CODE	LeaveCode	WChar
5		PERJLEV_BEGIN_BALANCE	BegYrLeaveBal	Numeric
6		PERJLEV_ACCRUED	LeaveAccrued	Numeric
7		PERJLEV_TAKEN	LeaveTaken	Numeric
8		PERJLEV_DATE_AVAIL	LeaveDateAvail	DBTime...
9		PERJLEV_HRS_BANKED	NoHrsEmplLeave	Numeric
10		PERJLEV_USER_ID	UserIdChangeRecord	WChar
11		PERJLEV_ACTIVITY_DATE	ActivityDate	DBTime...

Item	Screen shot
14	**Faculty Pay Stub & Records** Faculty can determine charges to leave banks and payment for substitute teaching on their pay stub. They can also access older pay stubs and leave bank balances by way of the Employees tab in MyPortal.
15	**Leave Monthly Audit Report** This report will list by month all leave and substitute transactions processed by payroll. This report will be accessed by Division Deans, Division Administrative Assistants, College & District Payroll, and College & District HR. It will be available as an ARGOS report on the Reports tab in MyPortal by the

FOOTHILL- DE ANZA COMMUNITY COLLEGE DISTRICT
LEAVE REPORT FOR FACULTY AND PAYMENT OF SUBSTITUTES
(See Article 16 of the *Agreement* between the District and Faculty Association)

Employee ID _____ Name: _____ _____(Please print)
First Last

FACULTY LOAD TYPE	TYPE OF ABSENCE NOTE: Five or more consecutive days of sick leave requires a Physician's Statement	DATE(S) OF ABSENCE	PARTIAL DAY		FULL DAY	Payroll Use Only
			# Hours Absent	# Hours Scheduled		
FULL-TIME Regular Load	Sick Leave					180
	Personal Leave/Section*_____					300
	Unpaid Leave					420
	Bereavement/Relationship*_____					240
	Jury Duty					Court Verification 260
	Workers Compensation					Contact HR 255
FULL-TIME Over Load	Sick Leave					183
	Personal Leave/Section*_____					300
	Unpaid Leave					420
	Bereavement/Relationship*_____					240
	Jury Duty					Court Verification 260
	Workers Compensation					Contact HR 255
PART-TIME Or SUMMER SESSION	Sick Leave					181/182/183
	Personal Leave/Section*_____					300
	Unpaid Leave					420
	Bereavement/Relationship*_____					240
	Jury Duty					Court Verification 260
	Workers Compensation					Contact HR 255
	Office Hour Leave					420
All Faculty	College Assigned Business					No Leave deducted 0

Process for Payment of Substitute:

Course ID #	Date(s)	Hours	Substitute Name	Employee ID	Payroll Use Only
					013 018 021
					013 018 021
					013 018 021

I hereby affirm that, with the exceptions reported, I have worked the scheduled duty hours for the period covered by this leave report.

I hereby affirm that I approve all leaves taken in accordance with the terms of the employment agreement in effect during this reporting period.

Employee Signature _____ Date _____ Dean/Supv. Signature _____ Date_____

Distribution: White and Canary: Campus Payroll Pink: Division Office Goldenrod: Employee
*See reverse side for reference FHDA S/N 23140 rev. 2008/05

Front of Paper Faculty Leave Report Form

Quick Reference from the Agreement between the District and Faculty Association

Personal Necessity Leave

16.1 "Personal necessity" means obligations or unavoidable duties of an employee that must be performed during scheduled working hours involving:

- 16.1.1 - Emergencies related to the faculty employee's home or to his or her immediate family** matters;
- 16.1.2 - **(Full-time faculty only)** Appointments for the purpose of conducting personal legal affairs or financial transactions that cannot be conducted outside of working hours;
- 16.1.3 - Receipt of a summons, subpoena or other judicial order requiring absence from work;
- 16.1.4 - Observance of a major religious holiday of the employee's faith;
- 16.1.5 - **(All full-time faculty and any part-time faculty with reemployment preference)** Attendance at professional conferences related to the teaching profession and/or one's area of assignment;
- 16.1.6 - Attendance at a funeral service; and
- 16.1.7 - Natural disasters that prevent a faculty employee from meeting all or part of his/her assigned duties.

Bereavement Leave

16.8 Each faculty employee shall be entitled to paid bereavement leave of absence sufficient to allow for three consecutive days, excluding weekends and holidays, following the death of any member of his or her immediate family**.

- 16.8.1 If the death is of a spouse or domestic partner or child, paid bereavement leave sufficient to allow for five consecutive days, excluding weekends and holidays, shall be granted.
- 16.8.2 If out-of-state travel or travel in excess of 300 miles is required, paid bereavement leave sufficient to allow for five consecutive days, excluding weekends and holidays, shall be granted.

Summer Session

26.5 Each faculty employee employed during the summer session shall be entitled to one day of paid leave of absence for illness or injury and one day of personal leave. Such leaves shall be subject to the terms and conditions set forth in Article 16 (Leaves), except that summer sick leave shall not accumulate from year to year.

****Immediate Family Member (Section Code 16.7)**

spouse	domestic partner
parent	parent-in-law
son	foster parent
daughter	step parent
sister	step child
brother	foster child
grandchild	brother-in-law
grandparent	sister-in-law

any other person living in the immediate household of the employee

For additional assistance, please see "FACULTY LEAVE REPORT - Guide to the Form" under http://business.fhda.edu/payroll/faq

Back of Paper Faculty Leave Report Form

Summary of E-Mails to be generated by Faculty Leave and Substitute Pay Report Application

To	Trigger	Content
Approver	Faculty clicks Submit button on Step 4 – Confirm screen	Subject: Leave Report Submitted for Approval Text: <Faculty Member Name> has submitted a leave report that is waiting for your approval. Please access via your Banner tab in MyPortal.
Faculty	Division clicks the Submit button on Step 4 Confirm screen	Subject: Leave Report Created by Division for your Review Text: In accordance with Article 16.36 of the Faculty Agreement, a leave report was created to cover your recent absence. Please sign in to MyPortal and click on Faculty Leave Reporting link to review the report. Please reply to this e-mail with approval and/or comments with in three Working days. No reply will constitute agreement. Below is a summary of the leave report in question: <Start Date> to <End Date> X hours of Sick/Personal Leave will be charged to your leave bank. This report was generated by x division. To review the report submitted, please do ….
Faculty	Division clicks Reject button on Approver Screen	Subject: Alert Leave Report Returned – Your Immediate Attention Required Text: Your leave report for <Start Date> to <End Date> for X division is being returned to you for correction. <Divisions Comments on rejected report>. To make corrections, please go to the Employees tab on MyPortal and select the Faculty Leave Reporting link. Then select the report for the dates listed, make the requested corrections and click the submit button to re-submit the report. Thank you in advance for your prompt attention to this matter.
Faculty	Division clicks Approve button on Approver Screen	Subject: Faculty Leave Report Approved Text: Your faculty leave report for <Start Date> to <End Date> with X hours of Sick/Personal has been approved by x division and has been forwarded to Payroll for processing.
Substitute	Division clicks Approve button on Approver Screen	Subject: Substitute Pay Report Approved Text: Your substitute pay report for <Start Date> to <End Date> has been approved by x division and has been forwarded to Payroll for processing.