

# Workday Webinar

## Understanding Absences and Time Off in Workday

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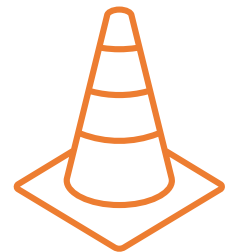
## Changes Are Coming!



There are some new processes that we will be going through today.

We will continue to work across the ISC and UBC HR to update the Workday Knowledge Base to include some of the information discussed today.

Keep your eyes peeled on [Workday This Week](#) for Workday Knowledge Base updates and other changes.



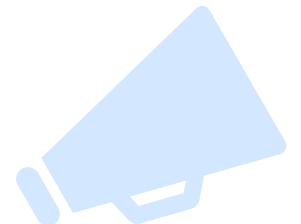
## Legislative Sick Time Off



ISC is aware of the challenges with 'Legislative Sick Time Off' and is working closely with VPHR to review and resolve the issues.

ISC is planning to resolve this by the beginning of 2023 and will communicate through [Workday This Week](#) and other **HR Communications Channels**.

If you have any questions, please connect with your unit HR or Advisory representative.



## WorkSafe BC Claims



- ✓ As all Workplace Injuries and WSBC Claims are reviewed on a case-by-case basis, we recommend reaching out to UBC Workplace Health Services for guidance as soon as a Workplace Injury occurs.
- ✓ You can reach out to Aidan Gregory (WSBC Claims Associate) directly for support on processing these time offs in Workday.  
[aidan.gregory@ubc.ca](mailto:aidan.gregory@ubc.ca)
- ✓ Aidan supports both UBC Vancouver and UBC Okanagan Workplace Injuries and WSBC Claims.



# Who Do I Go to for Help?



## ISC

- ☐ Why am I getting this error?
- ☐ The hours I adjusted using 'maintain accrual and time off adjustments/ overrides' are not reflected on the Employee's record.
- ☐ Why is this employee's vacation entitlement incorrect?
- ☐ How can I correct a Leave of Absence?
- ☐ Which leave types do hourly employees also have to do additional time entry for?
- ☐ Why did this Leave of Absence BP skip approvals?



## Central HR/FR

- ☐ What type of leave request do I need to submit?
- ☐ Should I use 'Time Off' or 'Leave of Absence'?
- ☐ Is this time off paid or unpaid?
- ☐ How can I manually add vacation hours to current year entitlement?
- ☐ UBC Practice & Policies
- ☐ What should I do when I have exhausted my sick and vacation balance?

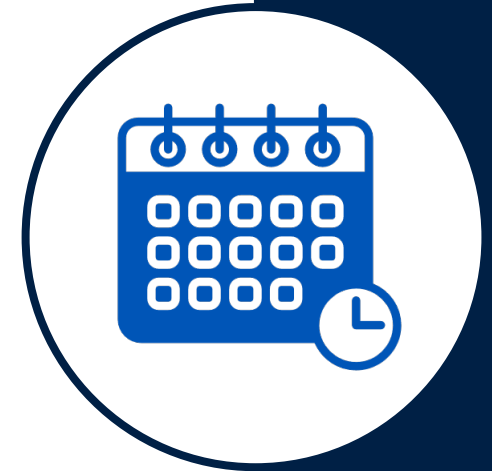
## To build on your understanding of the following and share some top tips

# Today's Focus



- ✓ Differences Between Time Off and Leave of Absence
- ✓ Processing Leave of Absences
- ✓ Benefits Impact as related to Leaves of Absence
- ✓ Leaves Specific to Faculty Members
- ✓ Temporary Promotion and Secondment and Absence Balances
- ✓ Understanding Absence Balances
- ✓ Adjusting Time Off Balances

# **Difference Between Time Off & Leave of Absence**



# Time Off & Leave of Absence



## Differences

### Time Off

- To be used when an employee is away for a short-term Time Off (e.g. sick, vacation, medical / dental).
- Time Off Balance can be viewed in 'Absence Balance' in Employee's profile.
- No Need to return employee from Time Off.
- Does NOT impact benefits because Time Offs are for shorter duration.
- Time Offs do not impact Vacation and Sick Time Off Accruals.
- Task to be used is 'Request Absence' or 'Enter Absence' when used by Manager or HR/FR/Payroll Security Roles.

→ To be used when an employee is away on a long-term absence (e.g. Disability, Maternity, Secondment).

→ Leave of Absences (LOA) do not have accruals or balances. However, the absence taken can be viewed in 'Absence Requests' in employee's profile.

→ At the end of the LOA, [BP - Return from Leave](#) must be completed to avoid payroll and benefits issues.

→ Unpaid (and some paid) LOAs impact employee's benefits.

→ Some LOAs impact Vacation and Sick Time Off Accruals depending on Employment Groups.

→ Task to be used is 'Request Leave of Absence' or 'Place Worker On Leave' when used by Manager or HR/FR/Payroll Security Roles.

### Leave of Absence



# Time Off & Leave of Absence Types



## Time Off (short term absences)

- Christmas Seasonal
- Dependent/Immediate Family Illness
- First Day of Injury (WCB)
- Funeral Time Off
- Legislative Sick Time Off
- Medical/Dental Time Off
- Paid Sick Time Off
- PD/Training Time Off
- Banked Overtime
- Bereavement
- Worker's Compensation
- Vacation
- Citizenship Time Off
- Jury Duty/Court Witness
- Military Time Off
- Personal Emergency Time Off
- Special Time Off
- Union/Business Time Off
- Unpaid Court Appearance
- Unpaid Family Responsibility
- Unpaid Sick Time Off – 5 consecutive days or less (30 for BCGEU OK)
- Unpaid Personal Time off – 5 consecutive days or less (30 for BCGEU OK)

## Leave of Absence (long term absence)

- Adoption Leave
- Caregiving Benefit
- Child Government Leave
- Maternity / Parental
- Layoff with Recall Rights
- Disability Leave
- Recurring Paid Sick (M&P and Faculty)
- Partial Disability Leave
- Partial Medical Leave – REO Driven
- Unpaid Medical Leave – more than 5 consecutive days (30 for BCGEU OK)
- Unpaid Personal Leave – more than 5 consecutive days (30 for BCGEU OK)
- Worker's Compensation
- Domestic Violence
- Reservist Leave
- Salary Continuance (Union)
- Administrative Leave (Faculty)
- Secondment / External Secondment
- Temporary Promotion
- Paid Temporary Leave
- Political Office Leave
- Sessional Recall / Benefit
- Study Leave Faculty
- Professional Development for Lecturers

Some Leave Types are initiated on the Employee's behalf (Admin Leave, Disability, Partial Disability, Partial Medical, Paid Temporary Leave etc.).



Employees will only see Time off and Leave Types they are eligible for (as per Collective Agreement).

Please visit the UBC HR Website - <https://hr.ubc.ca/benefits/benefit-plan-details/vacation-leaves>.

# Time Off or Leave Of Absence?



## Request for Unpaid Sick or Unpaid Personal – UBCV & UBCO

If the request is more than 5 consecutive working days (UBCV) or 30 consecutive working days (BCGEU OK), it must be submitted as a Leave of Absence. You will get an error message if you try and submit it as a Time Off.

**Example:** A CUPE 2950 employee requesting Unpaid Personal time (e.g. From 30-May-2022 to 17-June-2022)  
Submit as **Unpaid Personal Leave** (not Unpaid Personal Time Off)

The screenshot shows the 'Absence Calendar' interface. At the top, there's a search bar and a 'MENU' button. Below the header, a red banner contains the title 'Absence Calendar'. A green checkmark is placed over the calendar grid, indicating a successful selection. The calendar shows dates from May 29 to June 18, 2022. The selected date range is highlighted in blue. The interface also includes a 'Balances' section on the left with a date range of '2022-09-19' and a 'Per Plan' section with a list of leave types.

The screenshot shows the 'Absence Calendar' interface with a red X over the calendar grid, indicating an error. The calendar shows dates from May 29 to June 18, 2022. The selected date range is highlighted in blue. The interface also includes a 'Balances' section on the left with a date range of '2022-09-24' and a 'Per Plan' section with a list of leave types.

If you are requesting Time Off or Leave of Absence, ensure to **select the full date range** (including Weekends).  
If your standard work week excludes weekends, these days will not be counted in your request.

# **Understanding When Hourly Employees Need to Enter Both Time Off and Time Entry Through Time Tracking**



# Time Entry for Hourly Employees While Requesting Time Off

- ✓ For certain Time Offs, hourly employees are required to submit hours, too, using Time Entry in addition to Requesting Time Off. This is independent of 'Request Absence' and is an additional task using 'Enter Time'. The employee will **not get paid** unless they submit hours as well and are approved before Payroll Cutoff.
- ✓ For remaining Time Offs, for Hourly employees, Time Entry is NOT REQUIRED. The employee will get paid automatically.

Hourly Employee Time Off  
Request Approved

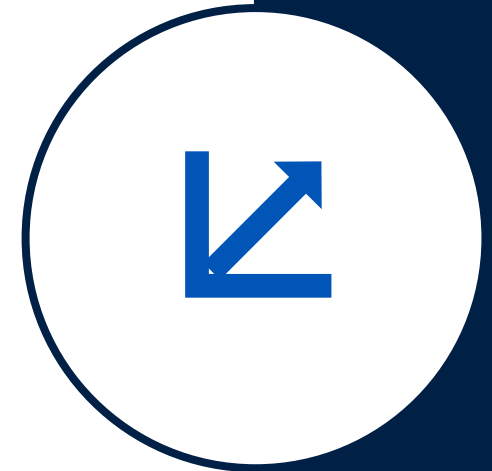
Additional Time Entry is **REQUIRED**

Additional Time Entry is **NOT REQUIRED**



- |  |   |  |  |
|--|---|--|--|
| <ul style="list-style-type: none"><li>• Christmas Seasonal Time Off</li><li>• Dependent/Immediate Family Illness</li><li>• First Day of Injury (WCB) Time Off</li><li>• Funeral Time Off</li><li>• Legislative Sick Time Off</li><li>• Medical/Dental Time Off</li><li>• Medical/Dental Childcare Time Off</li></ul> | <ul style="list-style-type: none"><li>• Paid Sick Time Off</li><li>• Pre-Placement Adoption</li><li>• Professional Development/Training Time Off</li><li>• Sick Time Off (less than 2 hours)</li><li>• Medical/Dental Time Off BCGEU OK</li></ul> | <ul style="list-style-type: none"><li>• Banked Overtime Time Off</li><li>• Bereavement Time Off</li><li>• Citizenship Time Off</li><li>• Jury Duty/Court Witness Time Off</li><li>• Leave for Birth of a Child Time Off</li><li>• Military Time Off</li><li>• Personal Emergency Time Off</li><li>• Special Time Off</li><li>• Suspension Time Off</li><li>• Union/Business Time Off</li></ul> | <ul style="list-style-type: none"><li>• Worker's Compensation Time Off</li><li>• Vacation - Hourly</li></ul> |
|--|---|--|--|

# Processing Leave of Absences



# Common Full Leave of Absence Types



## Fully Unpaid by UBC

- Adoption Leave
- Caregiving Benefit
- Disability Leave
- Maternity/Parental Leave
- Parental Leave
- Reservist Leave
- Study Leave
- Unpaid Medical Leave
- Unpaid Personal Leave
- Child Government Leave
- Political Office Leave
- Session Out Leave
- Sessional Recall/Benefits Eligible
- Layoff with Recall Rights
- External Secondment



## Partially Paid by UBC

- Study Leave
- Partial Disability Leave
- Partial Medical Leave



## Fully Paid by UBC

- Paid Sick Recurring (M&P and Faculty)

**Some Fully Unpaid Leave of Absences may be eligible for a paid top up benefit.**

# Processing Long Term Absences

- ✓ An Employee on a full **Long-Term Leave** will not be working any hours and must be placed on Unpaid Leave of Absence (LOA)
- ✓ This will ensure the Employee is not overpaid
- ✓ If applicable, Employee can choose whether to maintain benefits while on the Unpaid LOA or not
- ✓ The Employee must be **returned from Leave** at the end of their Leave

## Putting Employee onto full Leave



## Returning Employee from Leave



If the Employee is moving from Full Disability to Partial Disability, failure to return the Employee from their Full Disability Leave will impact any further UBC payments to the Employee.

As Full Disability is an unpaid Leave, **they will not receive any UBC pay until returned from that leave.**

# **Disability Leave, Partial Disability, Unpaid and Partial Medical, & Gradual Return to Work**





# When to Use Disability Leave vs Partial Disability Leave vs Unpaid and Partial Medical Leaves vs Gradual Return to Work

| Disability Leave   | Partial Disability Leave  | Unpaid and Partial Medical Leaves   | Gradual Return to Work   |
|--|---|---|--|
| If Sun Life has approved full disability; HR-Benefits will advise you if the disability claim has been approved. | <p>If Sun Life has approved partial disability; HR-Benefits will advise you if the partial disability claim has been approved.</p> <p>Partial disability is only for Faculty and M&amp;P.</p> | <p>For medical related leaves that are not disability.</p> <p>Full medical leave is when employee not working and has exhausted their sick time and not on disability.</p> <p>Partial medical leave is when employee is working partial hours and has exhausted their sick time and is not on disability.</p> | <p><b>Returning from Disability or Medical leave:</b></p> <ul style="list-style-type: none"><li>➤ An employee on Disability or Medical leave may participate in a Gradual Return to Work plan as part of their return to work.</li><li>➤ Based on communication from Return to Work or Benefits teams, submit a Change Job to adjust their FTE according to their GRTW plan.</li><li>➤ You may need to submit a Change Job each week if their hours fluctuate.</li></ul> |



If you are unsure about which Leave type to use, please reach out to your unit HR or Advisory representative.

# Processing a Partial Disability or Partial Medical Leave

If an employee is on a partial leave, the following BPs must be completed:

- ✓ 'Place Worker on Leave' and
- ✓ Job Change – FTE Changes – Partial Disability/Medical

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## PUTTING EMPLOYEE ONTO PARTIAL DISABILITY OR PARTIAL MEDICAL LEAVE

Place Worker on Leave BP (initiated by Dept)  
Leave Type = Partial Disability or Partial Medical

## 2 UPDATING EMPLOYEE'S FTE (Reducing FTE as per Partial Leave)

Update Worker's  
FTE

Job Change > FTE  
Changes > Partial  
Disability/Medical  
(% EE is working)

Assign Costing  
Allocations  
(skip)

Update Vacation  
Balance  
(adjust if needed)

Submit FTE  
Change



**Note:** For Hourly Employee's, the FTE 'To Do' can be skipped, as their hours worked will be entered through Time Tracking

Ensure that the FTE of the employee is reduced once put on 'Partial Medical or Partial Disability Leave.'  
Failing to do so could result in **Over Payment** and **Benefit Implications**.

# Returning from a Partial Disability or Partial Medical Leave

When the Employee is cleared to return to full work, the following BPs must be completed:

- ✓ 'Return Worker from Leave'
- ✓ 'Job Change – FTE Changes – Gradual Return to Work Program'

## 1 RETURN WORKER FROM LEAVE



Return Worker from Leave BP (initiated by Dept)

## 2 UPDATING EMPLOYEE'S FTE (Gradually Increasing FTE to Original)



Update Worker's FTE

FTE Changes -  
Gradual Return to  
Work Program  
(back to Original FTE)

Assign Costing  
Allocations  
(skip)

Update Vacation  
Balance  
(adjust if needed)

Submit FTE  
Change



Ensure that the employee is returned to Original FTE after processing 'Return from Leave'.  
Failing to do so will result in **Under Payment** and **Benefit Implications**.

# Leave of Absence – Full Disability

## **Scenario 1: The employee has exhausted their Sick Time Off and have applied for (or planning to apply for) Disability Leave.**


- The Employee should be placed on 'Unpaid Medical Leave of Absence' while awaiting Sun Life's decision.
- The University does not suggest employee to use Vacations, Banked OT or other paid time off to compensate their income while awaiting for a decision from Sun Life. If the employee is approved for Disability Leave and the date of disability is retroactive, the employee would be required to pay the University back for those Vacations, Banked OT payments as well as any other retroactive benefit impacts. As all situations are unique, should you have any questions about your particular scenario and how to best manage the Leave of Absence, we recommend connecting in with your unit HR or Advisory Contacts (<https://hr.ubc.ca/contact/contact-advisory-services>).
- If the employee does use Vacation, Banked OT beyond their sick accruals, and then approved for Disability Leave, the Department is responsible for correcting of their time off before processing Disability Leave. The Department will also need to work with the Payroll and the employee to determine the overpayment and repayment plan.
- For UBCO, ensure you are always reaching out to your WRAP team after 5 days of absence.

As all situations are unique, should you have any questions about your particular scenario and how to best manage the Leave of Absence, we recommend connecting in with your unit HR or Advisory representative.

# Leave of Absence (LOA) – Full Disability

**Scenario 2: The Disability Leave start date is prior to the start date of ‘Unpaid Medical Leave’.**


- The Employee was placed on ‘Unpaid Medical Leave’ while awaiting decision from Sunlife. The employee is approved for Disability Leave, however, the date is prior to the start date of ‘Unpaid Medical Leave’.
- Submit a Workday Support Request for ISC to rescind the ‘Unpaid Medical Leave’. Once it’s done, the department can place the employee on ‘Disability Leave’.



The diagram illustrates the timeline for Scenario 2. It features two horizontal double-headed arrows. The top arrow is orange and labeled 'Unpaid Medical Leave'. The bottom arrow is blue and labeled 'Disability Leave'. The blue arrow starts at a point to the left of the orange arrow's start point and ends at the same point as the orange arrow. To the right of the orange arrow, there is a solid orange arrow pointing right, labeled 'Rescind'.

**Scenario 3: The Disability Leave start date is after the start date of ‘Unpaid Medical Leave’.**

- The Employee was placed on ‘Unpaid Medical Leave’. The employee is approved for Disability Leave, however, the date is after the start date of ‘Unpaid Medical Leave’.
- The department needs to return the employee from ‘Unpaid Medical Leave’, then place them on ‘Disability Leave’.



The diagram illustrates the timeline for Scenario 3. It features two horizontal double-headed arrows. The top arrow is orange and labeled 'Unpaid Medical Leave'. The bottom arrow is blue and labeled 'Disability Leave'. The blue arrow starts at a point to the left of the orange arrow's start point and ends at the same point as the orange arrow. To the right of the orange arrow, there is a solid orange arrow pointing right, labeled 'Return from Leave'.

As all situations are unique, should you have any questions about your particular scenario and how to best manage the Leave of Absence, we recommend connecting in with your unit HR or Advisory representative.

# Important Reminders



- ✓ If the employee has returned from Disability, Partial Disability or Partial Medical Leave, make sure to **Return them from Leave** and **update the Working FTE**.
- ✓ The 'Estimated Last Day of Leave' that is entered by the department when the employee is placed on a leave **DOES NOT** return the employee from Leave. Department needs to process '**Return Worker from Leave**' BP and enter the 'Actual Last Day of Leave' and 'First Day Back at Work'.
- ✓ Correcting a Leave of Absence **DOES NOT** send a corrected Change Benefit Task to the Employee. If you are correcting LOA, please submit a Workday Support Request for the ISC to review and send a corrected benefit task if necessary.
- ✓ Should you have any **questions** about your particular scenario and how to best manage the Leave of Absence, we recommend connecting with your unit HR or Advisory representative and/or Return to Work Coordinator.

# **Benefits Impact as Related to Leave of Absences**



# While on Government or Non-Government Leave

|   | If the employee is approved for government leave (e.g. Maternity/parental/adoption): | If the employee is approved for non-government leave (e.g. unpaid personal leave): |
|---|--|--|
| Health Benefits                                   | ➤ Normal cost sharing  | ➤ Employee responsible for full cost   |
| Basic Life<br>Optional Life/AD&D (if enrolled)    | ➤ Normal cost sharing  | ➤ Employee responsible for full cost   |
| Disability Benefit Plan / Income Replacement Plan | ➤ Normal cost sharing  | ➤ Employee responsible for full cost   |
| Staff Pension Plan                                | ➤ Normal cost sharing  | ➤ Employee responsible for full cost   |
| Faculty Pension                                   | ➤ Normal cost sharing  | ➤ Employee responsible for full cost   |



# While on Disability, Partial Disability or Partial Medical Leave

|  | If the employee is approved for <u>(full) Disability</u> by Sun Life:  | If the employee is approved for <u>Partial Disability</u> by Sun Life:   |
|--|--|--|
| <b>Health Benefits</b>   | <ul style="list-style-type: none"> <li>➤ Continues if the employee was enrolled prior to the leave</li> <li>➤ Cost paid by the University</li> </ul>                                     | <ul style="list-style-type: none"> <li>➤ Continues if the employee was enrolled prior to the leave</li> <li>➤ Cost paid is paid by University or Department, depending on working FTE</li> </ul> |
| <b>Basic Life</b><br><b>Optional Life/AD&amp;D (if enrolled)</b> | <ul style="list-style-type: none"> <li>➤ Basic Life based on full salary, paid by University</li> <li>➤ Optional Life/AD&amp;D premiums waived subject to Sun Life's approval</li> </ul> | <ul style="list-style-type: none"> <li>➤ Basic Life based on full salary, paid by University</li> <li>➤ Optional Life/AD&amp;D premiums waived subject to Sun Life's approval</li> </ul>         |
| <b>Disability Benefit Plan/ Income Replacement Plan</b>          | <ul style="list-style-type: none"> <li>➤ Ends</li> </ul>   | <ul style="list-style-type: none"> <li>➤ Ends</li> </ul>   |
| <b>Staff Pension Plan</b>  | <ul style="list-style-type: none"> <li>➤ Employee responsible for full cost if they want to accrue pensionable service while on disability</li> </ul>                                    | <ul style="list-style-type: none"> <li>➤ Contributions based on working FTE; employee can contact Payroll to top-up to pre-disability salary</li> </ul>  |
| <b>Faculty Pension</b>   | <ul style="list-style-type: none"> <li>➤ The Income Replacement Plan makes monthly contributions equal to 15% of gross pre-disability monthly earnings</li> </ul>                        | <ul style="list-style-type: none"> <li>➤ Contributions based on working FTE; the Income Replacement Plan makes monthly contributions equal to 15% of the partial disability leave FTE</li> </ul> |

## If the employee is on Partial Medical Leave:

- Depends on working FTE
  - If FTE is 50% or more: benefits and pension continue with normal cost-sharing; premiums/contributions that are based on salary will be calculated based on the working FTE and no option for top-up
  - If FTE is less than 50%: similar to unpaid leave, employee is responsible to pay the full cost for any benefits they select

# Benefit Task – Go on Leave / Return from Leave

## Streamlined Process for Continuation of Benefits While on Leave of Absence

### Unpaid leave:

Absence approved → employee receives a benefit task in Workday

Employee → chooses Select or Waive for each benefit plan

Benefits Partner (Central Payroll) → review/approve the enrollment and let the employee know the total monthly cost

- Benefit task replaces paper benefits invoice that was mailed by Payroll
- Benefits Partner will set up direct withdrawal of benefit premiums from the employee's bank account – eliminating the need for post-dated cheques.
- If employee is eligible for top-up – benefit premiums will be taken from their top-up payment and the employee's bank account when top-up ends
- The employee provides authorization when they submit their enrollment

**Paid leave:** benefits/pension continue → no task sent

When the employee **returns to work after their unpaid leave**, they will receive a task to re-enroll for benefits/pension

- Benefits revert back to normal employee and employer cost-sharing

# Benefits Task



It is important that employees complete their task in a timely manner and before the "Submit by Date" in order to ensure:

## Continuation of benefits/pension during unpaid leave

Failure to do so will result in automatic waiving of all benefits during an unpaid non-government leave; since employees pay the full cost the default selection is waived if the employee doesn't complete their task

## Re-enrollment of benefits/pension when an employee returns from leave

Failure to do so will mean employees may not be re-enrolled for optional benefits when they return from leave (they are automatically re-enrolled for mandatory benefits).

Managers – please remind employees to check their Workday inbox for benefit tasks. Employees can also refer to the Workday Knowledge Base for assistance with completing the task or contact the ISC.

# Leaves Specific to Faculty Members



# Faculty specific leaves in Workday

- ✓ Within the Business Process, pro-rated salary will happen automatically based on the below leave type selected and approvals are within Workday.
- ✓ Please refer to the Faculty Relations website and the Faculty Association Collective Agreement (CA) for the complete eligibility.
- ✓ Remember, for Long Term Absences, at the end of the Leave, a 'Return from Leave' Business Process must be completed to return the employee to full pay.

Some of the most common Faculty-specific leaves in Workday under **Professional Leaves** are:

## Study Leave

Tenure/Confirmed Stream Faculty, and Program Directors

Benefits remain at 100%

*If the determined % is outside of what is noted in the CA, please work directly with FR*



| Yrs of Service | Leave Duration | Salary % |
|----------------|----------------|----------|
| 4              | 12 months      | 60%      |
| 4              | 6 months       | 75%      |
| 4              | 8 months       | 75%      |
| 6              | 12 months      | 80%      |
| 6              | 6 months       | 90%      |

## Administrative Leave

Academic Executive roles (e.g. Heads/Directors & Deans/Principals)

100% salary and benefits



Completion of a three-year term – 8 months  
Completion of a five-year term – 12 months  
If term extended – leave cannot exceed 18 months

## Professional Development for Lecturers

Benefits remain at 100%



Completion of 6 or more years of consecutive service  
4 months, 80% salary either from dates:  
January 1 to April 30  
September 1 to December 31

# Faculty Vacation



## Librarians and Program Directors

- ✓ Entitled to vacation based on their years of service and are to enter their vacation requests in Workday
- ✓ Unused vacation will be paid out (or clawed back) upon termination



## Sessional Lecturers

- ✓ Paid 4% of gross earnings in lieu of vacation
- ✓ After five consecutive years of full-time service, vacation pay increased to 6% of gross earnings
- ✓ Processed annually through Faculty Relations

Due to the ability to negotiate entitlement, **all other Faculty vacations** are to be tracked outside of Workday in line with the Faculty Agreements and Departments own practices. This includes:

- Tenure Stream / Lecturers
- Research Associates
- Postdoctoral Fellows (Employees)

## Faculty Recurring Paid Sick

Faculty are entitled to Recurring **Paid** Sick Time Off. A faculty member can take sick time off for 6 months per illness. This includes:

- Faculty – Administrative
- Faculty – Librarian
- Faculty - Part-time/Without Review
- Faculty - Tenure Stream
- Faculty - Term

# Tips and Tricks



→ For **Study Leaves**, a copy of the Study leave form is still required for upload  
→ Approval routings will be within Workday  
→ The faculty member is required to fill out this form in full and sign the *Statement By The Applicant*. If not signed, the process cannot proceed. Form available on the FR/HR Website

→ For **Faculty Administrative Leaves**, please upload a copy of the section of the Offer of Employment, which states the details of this leave

→ For **Professional Development for Lecturers**, have a filled-out copy of the Professional Development for Lecturers form ready for upload  
→ Form available on the HR website

→ To **extend the tenure clock** in relation to Maternity/Parental or Adoption Leaves, use the **Reappointment-Same BP**, and within the 'Update Academic Appointment' task, use reason 'Clock Extension – Maternity/Parental, and adjust the dates as required'  
→ The Academic Appointment is where most tenure/promotion details are

# **Temporary Promotion & Secondment and Impacts on Absence Balances**





# When are Temporary Promotions and Secondments Used?

- ✓ When an employee is **Temporarily** Promoted or Seconded to a new position and intends to return to their original position.

## How Can These Be Processed?

If the Temporary promotion is for minimal number of Shifts / for shorter duration



Time Tracking BP

Request Compensation Change BP (Additional Responsibilities)

(reach out to your unit HR or Advisory representative)

If the Temporary Promotion or Secondment is for a longer duration



Per the Temporary Promotion/Secondment Knowledge Based Article

- Leave of Absence BP
- Add Job BP

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Reminder: if the temporary position needs to be posted, ensure to follow posting rules.

# Initiating a Temporary Promotion or Secondment Per Knowledge Based Article

Two Business Processes (BP) are used to process Temporary Promotion / Secondment. This is essential to keep the employee's original position active.

## 1. LEAVE OF ABSENCE BP

The original position that will be put on LOA.

Home Department

- ✓ Home Department to Place Employee on Leave from Current Position using reason 'Temporary Promotion' or 'Secondment'.
- ✓ The Vacation and Sick Time Off for the home department position (that goes on leave) gets pro-rated based on the last day of the work.
- ✓ The **home department should communicate** Time Off Balance that needs to be transferred to Temporary Department Position.

## 2. ADD JOB BP

The new position that the employee will be promoted / seconded to (using Add Job).

Temporary Department

- ✓ Temporary Department to use 'Add Job' BP using reason 'Temporary Promotion' or 'Secondment' to add new position.
- ✓ Once the Add Job BP is completed, the vacation and sick time off (if eligible) for temporary department position is prorated based on the start date of 'Add Job'.
- ✓ Based on communication from Home Department, **the temporary department should transfer** the time off balance to this new position through 'Maintain Accrual and Time Off Adjustments/Overrides'.

If the Temporary Promotions / Secondment is within same department, the initiator may be able to complete both – 'Place Employee on Leave' and 'Add Job'.

# Ending a Temporary Promotion/Secondment and Return to Home Position

Two Business Processes are used to end Temporary Promotion / Secondment. This is essential to keep the employee's original position active.

## 1. END JOB BP

The new position employee was promoted to (End Job).



- ✓ The temporary department needs to note the time off balances in the comments during 'End Job' BP.
- ✓ Payroll Representative Role will get a 'To Do' in End Job BP to update the employee's Time Off balance.

Or Temporary Department to Initiate Vacation Payout before End Job BP (if vacation balance needs to be paid out)

## 2. RETURN FROM LEAVE BP

The original position that was put on LOA.



- ✓ Return the Employee from Leave.
- ✓ The Vacation and Sick Time Off for the home department position gets pro-rated based on the first day back from the leave.
- ✓ Ensure that the Time Off Balance is correct.

If the Temporary Promotions / Secondment is within same department, the initiator may be able to complete both – 'End Job' and 'Return Employee from Leave'.

# Ending Home Position and Staying within the Temporary Promotion/ Secondment Position which becomes Ongoing

If the temporary assignment is to become ongoing, three Business Processes are used to process this change.

## 1. RETURN FROM LEAVE BP

The original ongoing home position that was on Leave (Return from Leave).

Original Home Department

- ✓ Return the Employee from Leave.

## 2. END JOB BP

The original home position that was put on LOA (End Job)

Original Home Department

- ✓ The home department needs to note the time off balances in the comments during 'End Job' BP.
- ✓ This will communicate to Payroll Operations to update the employee's Time Off balance (if balance needs to be transferred).  
Or Home Department to Initiate Vacation Payout before (if vacation balance needs to be paid out)

## 3. CHANGE JOB BP

The New Ongoing Position (Change Job BP: Term to Ongoing)

New Home Department

- ✓ Change Job BP.
- ✓ Ensure that the correct Time Off Balance were transferred for the Temporary Department Position.

If the Temporary Promotions / Secondment is within same department, the initiator may be able to complete both – 'Return Employee from Leave' and 'End Job'.

# Understanding Absence Balances



# Time Off Balance Table

Balances Tracked in Hours 9 items

| Absence Plan | Unit of Time | Position | Beginning Year Balance                 | Accrued Year To Date                | Absence Paid Year To Date | Beginning Period Balance       | Accrued in Period  | Absence Paid in Period | Carryover Forfeited in Period | Ending Period Balance   | Ending Period Balance Including Pending Events  | As of Period   |
|--------------|--------------|----------|--|-------------------------------------|---------------------------|--------------------------------|--------------------|------------------------|-------------------------------|---|---|----------------|
|              | In Hours     |          | Balance carried forward from last year | Current Year Entitlement Cumulative |                           | Balance as Start of the Period | Accrual Per period | Absence Paid in period | Carryover Forfeited           | Absence Balance at the End of the Period. This balance will include only those absences that were approved. | Absence Balance at the End of the Period including in-progress Absence Request (Not Approved yet) | Absence Period |

# Time Off Balance Table

Balances Tracked in Hours



| Absence Plan             | Unit of Time | Position | Beginning Year Balance | Accrued Year To Date | Absence Paid Year To Date | Beginning Period Balance | Accrued in Period | Absence Paid in Period | Carryover Forfeited in Period | Ending Period Balance | Ending Period Balance Including Pending Events | As of Period                      |
|--------------------------|--------------|----------|------------------------|----------------------|---------------------------|--------------------------|-------------------|------------------------|-------------------------------|-----------------------|--|-----------------------------------|
| Other Time Off           | Hours        |          | 0                      | 0                    | 0                         | 0                        | 0                 | 0                      | 0                             | 0                     | 0  | 2022-10-01 - 2022-10-31 (Monthly) |
| Legislative Sick Plan    | Hours        |          | 0                      | 35                   | 0                         | 0                        | 35                | 0                      | 0                             | 35                    | 25   | 2022-01-01 - 2022-12-31 (Annual)  |
| Paid Sick Time Off       | Hours        |          | 0                      | 52.5                 | 0                         | 43.75                    | 8.75              | 0                      | 0                             | 52.5                  | 38.5   | 2022-10-01 - 2022-10-31 (Monthly) |
| Unpaid Personal Time Off | Hours        |          | 0                      | 0                    | 0                         | 0                        | 0                 | 0                      | 0                             | 0                     | 0  | 2022-10-01 - 2022-10-31 (Monthly) |
| Unpaid Sick Time Off     | Hours        |          | 0                      | 0                    | 0                         | 0                        | 0                 | 0                      | 0                             | 0                     | 0  | 2022-10-01 - 2022-10-31 (Monthly) |
| Vacation                 | Hours        |          | 68.75                  | 175.24               | 154                       | 68.75                    | 175.24            | 154                    | 0                             | 89.99                 | 68.99  | 2022-01-01 - 2022-12-31 (Annual)  |
| Total:                   |              |          |                        |                      |                           |                          |                   |                        |                               | 9                     | 132.4  |                                   |

68.75 hours of Vacation balance carried forward from last year (2021)

Entitlement prorated based on Hire Date, FTE, End Employment Date and Effective Date. Any adjustments done through 'Maintain Accrual and Time Off Adjustments/Overrides' would be visible here.

154 hours of absence taken as of today.

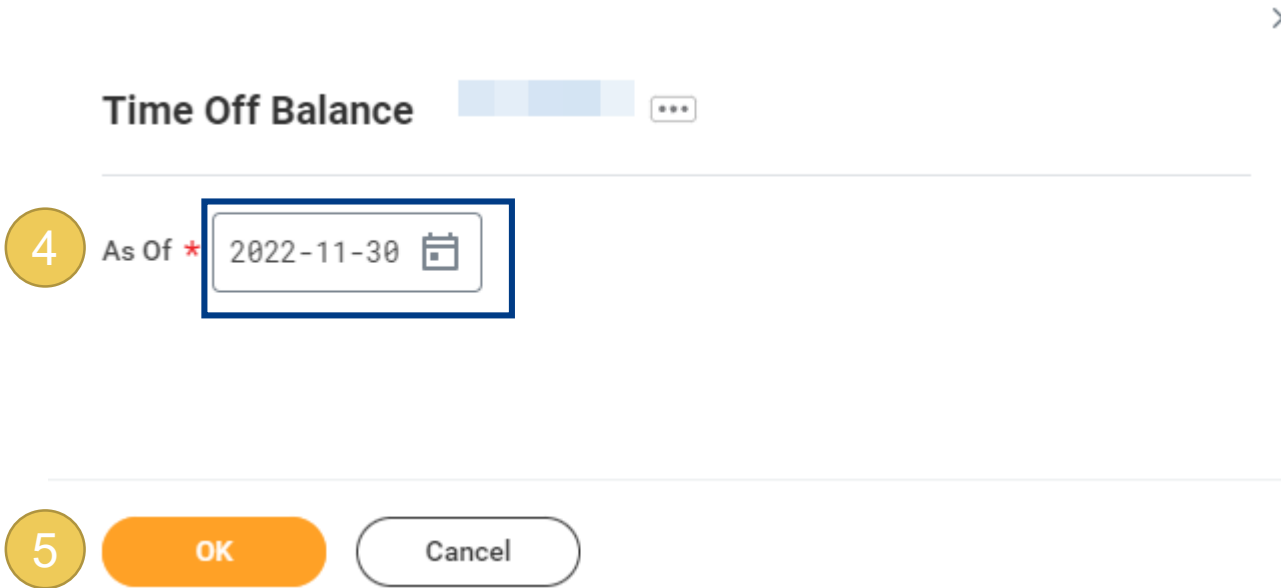
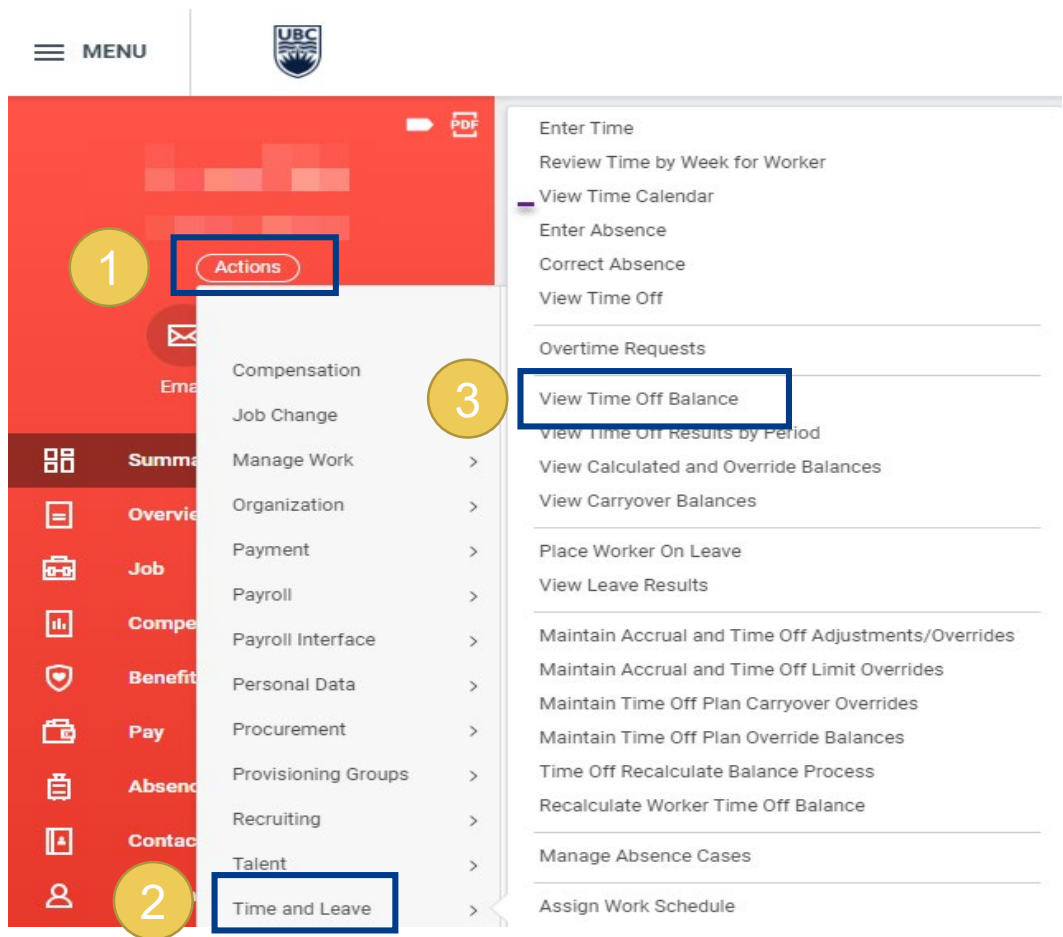
89.99 is the balance as of today.  
 $(68.75 + 175.24 - 154 = 89.99)$

69.99 is the balance as of today. This consists of in-progress time off requests too (Not Approved)

# Future Dated Time Off Balance

For Absence Management, the Employees, Managers and Other Roles can also see the absence balance for future date.

Go to Employee's profile → Actions→ Time and Leave→ View Time Off Balance.  
Enter the required Date & Click OK.



Employees can also check via View All Apps (on Home Page) → Absence → Absence Balance



# Viewing Future Dated Time Off Balance

Balances Tracked in Hours

| Absence Plan             | Unit of Time | Position | Beginning Year Balance | Accrued Year To Date | Absence Paid Year To Date | Beginning Period Balance | Accrued in Period | Absence Paid in Period | Carryover Forfeited in Period | Ending Period Balance | Ending Period Balance Including Pending Events |
|--------------------------|--------------|----------|------------------------|----------------------|---------------------------|--------------------------|-------------------|------------------------|-------------------------------|-----------------------|--|
| Other Time Off           | Hours        |          | 0                      | 0                    | 0                         | 0                        | 0                 | 0                      | 0                             | 0                     | 0  |
| Legislative Sick Plan    | Hours        |          | 0                      | 35                   | 0                         | 0                        | 35                | 0                      | 0                             | 35                    | 25   |
| Paid Sick Time Off       | Hours        |          | 0                      | 52.5                 | 0                         | 43.75                    | 8.75              | 0                      | 0                             | 52.5                  | 38.5   |
| Unpaid Personal Time Off | Hours        |          | 0                      | 0                    | 0                         | 0                        | 0                 | 0                      | 0                             | 0                     | 0  |
| Unpaid Sick Time Off     | Hours        |          | 0                      | 0                    | 0                         | 0                        | 0                 | 0                      | 0                             | 0                     | 0  |
| Vacation                 | Hours        |          | 68.75                  | 175.24               | 154                       | 68.75                    | 175.24            | 154                    | 0                             | 89.99                 | 68.99  |
| Total:                   |              |          |                        |                      |                           |                          |                   |                        |                               | 177.49                | 132.49   |

Time Off Balance as of Today

Balance As Of Date 2022-11-30

Values displayed are based on the Balance As Of Date entered. To view details drill down on Year to Date values.

Balances Tracked in Hours

| Absence Plan             | Unit of Time | Position | Beginning Year Balance | Accrued Year To Date | Absence Paid Year To Date | Beginning Period Balance | Accrued in Period | Absence Paid in Period | Carryover Forfeited in Period | Ending Period Balance | Ending Period Balance Including Pending Events |
|--------------------------|--------------|----------|------------------------|----------------------|---------------------------|--------------------------|-------------------|------------------------|-------------------------------|-----------------------|--|
| Other Time Off           | Hours        |          | 0                      | 0                    | 0                         | 0                        | 0                 | 0                      | 0                             | 0                     | 0  |
| Legislative Sick Plan    | Hours        |          | 0                      | 35                   | 0                         | 0                        | 35                | 0                      | 0                             | 35                    | 25   |
| Paid Sick Time Off       | Hours        |          | 0                      | 61.25                | 0                         | 52.5                     | 8.75              | 0                      | 0                             | 61.25                 | 47.25  |
| Unpaid Personal Time Off | Hours        |          | 0                      | 0                    | 0                         | 0                        | 0                 | 0                      | 0                             | 0                     | 0  |
| Unpaid Sick Time Off     | Hours        |          | 0                      | 0                    | 0                         | 0                        | 0                 | 0                      | 0                             | 0                     | 0  |
| Vacation                 | Hours        |          | 68.75                  | 175.24               | 189                       | 68.75                    | 175.24            | 189                    | 0                             | 54.99                 | 33.99  |
| Total:                   |              |          |                        |                      |                           |                          |                   |                        |                               | 151.24                | 106.24   |

Time Off Balance as of 30-November-2022.

# Adjusting Balances Tips and Tricks



# When to Adjust Vacation Balance?

The Vacation balance should be reviewed and adjusted (part of BP or Standalone task):

➤ When an employee's balance needs to be moved from one position to another:

- When an employee moves from hourly to salaried position or vice versa.
- When an employee moves from one Employment Group to another (e.g. from CUPE to M&P).

Make sure to **note the current balance before initiating 'Change Job' BP**. The initiator of 'Change Job' BP needs to communicate the balance to the HR Roles/Manager of the new position. Once the change job BP is complete, update the balance to the new position.

➤ When an employee negotiates more than the minimum vacations entitlements.

➤ If an employee has multiple positions and **secondary position is Ending. Note the balance for secondary position.**

'End Job' BP - Put the Time Off balance as of their last day in secondary position in **comments section**.

- The Vacation Balance for secondary position can be transferred to employee's primary position.
- The Vacation Balance for the secondary position can be paid out via Lump Sum Payment (Vacation Payout). Make sure to pay it out *before* initiating 'End Job' BP.

It is recommended that the initiator of 'End Job' BP reaches out to the Employee and Employee's Primary Manager in case the Vacation Balance needs to be transferred to Primary Position.

# Reminders



- ✓ If an employee is being transferred from Hourly to Salaried or to a different Employment Group (or vice versa), make sure to **note their Time Off Balance before initiating BP Change Job**. The balance from older position needs to be moved to new position. Vacation Transfer Calculator (<http://payrollintranet.ubc.ca/calculators/VacationTransfer.htm> ).
- ✓ If an employee is on LOA, and is being terminated / moved to a different position / Change Job, make sure to **Return the employee from Leave first**.
- ✓ Vacation Entitlement for the employee's current year is prorated based on their FTE, Hire Date, End Employment Date and effective date of position.
- ✓ If an employee has a future dated Time Off request and is now being transferred to a new position, please cancel / correct the future dated Time Off request so that it corresponds to the new position.
- ✓ If an employee is on LOA, depending on their employment group & type of LOA, they will not accrue Sick Time Off and Vacation for the duration of the LOA. Departments DO NOT have to do any adjustments. The employee will start accruing Sick Time off and Vacation once they are Returned from the Leave.
- ✓ Vacations and Sick Time Off for Student Job Family is tracked outside of Workday.

# **How to Adjust Balances Through 'Maintain Accrual and Time Off Adjustments'**



# How Do I Adjust My Team's Vacations? (Standalone task)

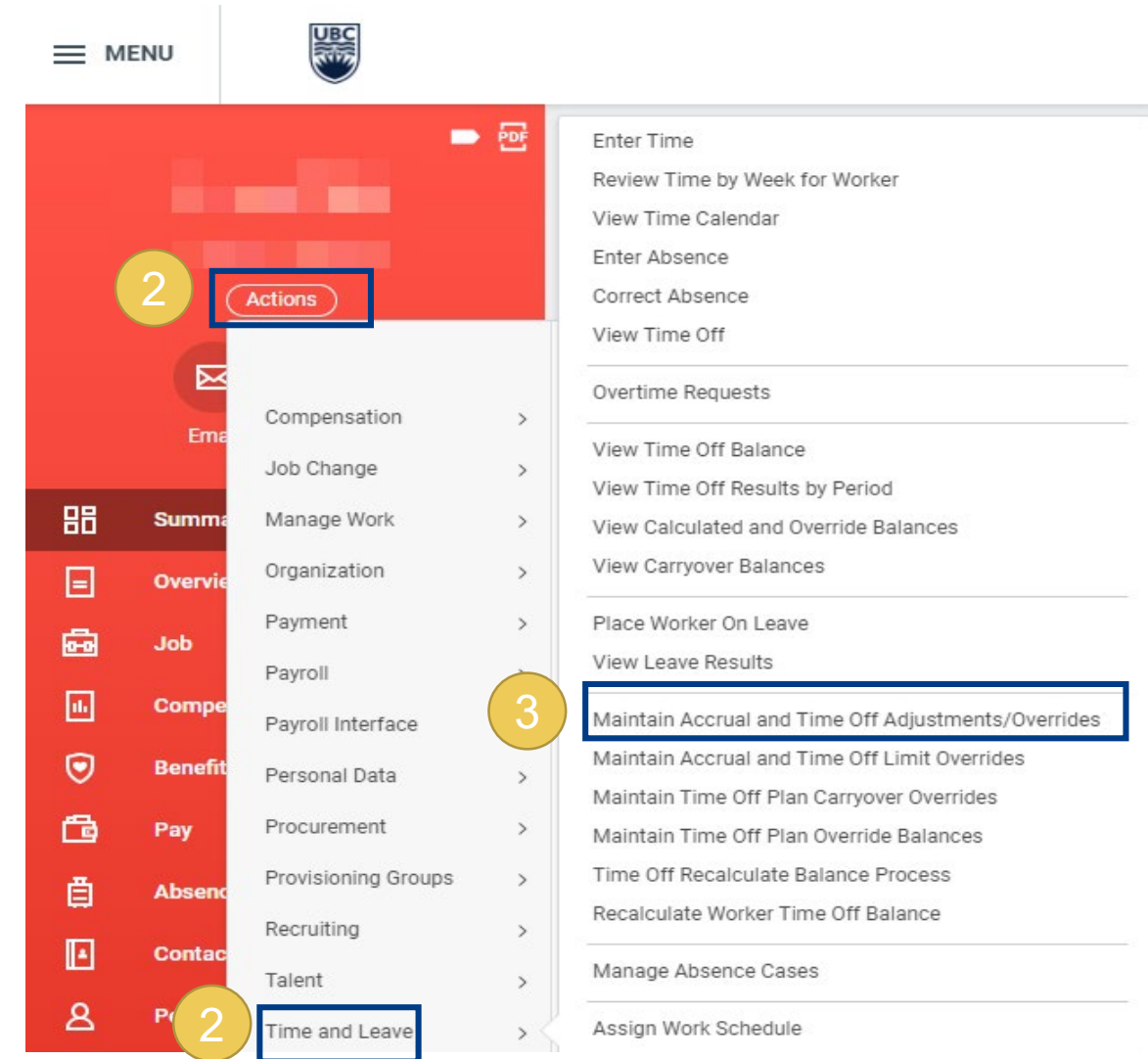
Those with HR and Manager Security roles can initiate this process as part of a Business Process or as a standalone task.

**As a standalone task, this can be initiated in 2 ways:**

1. Search 'Maintain Accrual and Time Off Adjustments/Overrides' in the search bar of Workday and enter employee's name.

2. Go to:

Employee's profile → Actions → Time and Leave → Maintain Accrual and Time Off Adjustments/ Overrides.



# How Do I Adjust My Team's Vacations? (Standalone task)

- ✓ To adjust the Vacation balance of the position, click on [Adjustments Tab](#) and [enter](#) the necessary information.
- ✓ If the employee is no longer in the position, you can make an adjustment in their current position (after confirming from HR/Manager).
- ✓ All the adjustments should be made in the tab '[Adjustments](#)'.

## Maintain Accrual and Time Off Adjustments/Overrides

Worker

**Adjustments** Overrides Automated Adjustments

Adjustments 1 item

|                                  | *Select Accrual/Time Off  | Units                           | *Period of Time | *Period   | *Reference Date                         | Position  | Batch ID             | Comment                            |
|----------------------------------|---|---------------------------------|-----------------|---|---|---|----------------------|------------------------------------|
| <input type="button" value="⊕"/> | <input type="button" value="⊗"/> Vacation - Adjustment Management & Professionals Accrual | <input type="text" value="20"/> | Hours           | <input type="button" value="⊗"/> 2022-01-01 - 2022-12-31 (Annual) | <input type="text" value="2022-01-01"/> | <input type="button" value="⊕"/> Manager Operations | <input type="text"/> | Add 20 hours to 2022 Vac. Entitlem |

20 hours are being added here. For deductions, make sure to enter the ' - ' (minus) sign. (e.g. - 20)

Select the Vacation Adjustment Category depending on employee's employment group.

Select the year that needs adjustment

Select the employee's position for which the adjustment is for

Enter detailed comment explaining the adjustment

While adjusting Time Offs, **DO NOT USE** tabs '**Overrides**' or '**Automated Adjustments**' because it has various downstream impacts.

# Vacation Payout upon Termination

- ✓ If the employee has already been terminated, you can review the Vacation Payout for employees by going to the Tab **‘Termination Adjustments’** in Maintain Accrual and Time Off Adjustments/Overrides once the Termination BP is processed in Workday.
- ✓ The Vacation Payout is prorated based on the Termination Date of the Employee.

Maintain Accrual and Time Off Adjustments/Overrides

Worker

Former Worker)

Adjustments

Overrides

Automated Adjustments

Termination Adjustments

Termination Adjustments 3 items

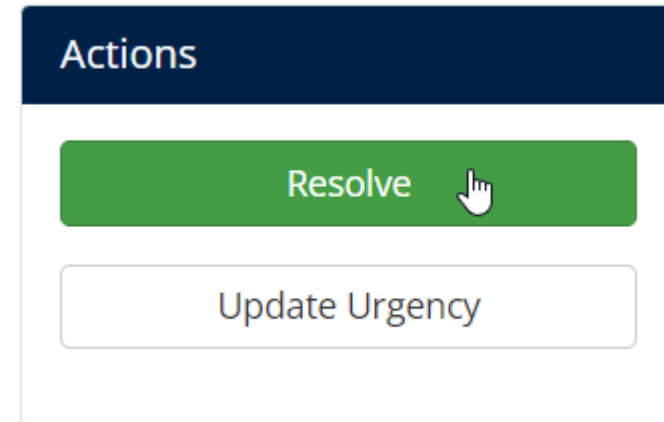
| Time Off                                      | Units | Unit of Time | Period  | Reference Date | Position | Termination Event | Comment |
|---|-------|--------------|---|----------------|----------|-------------------|---------|
| Vacation - CUPE 2950 / Exec Admin Termination | 64.4  | Hours        | 2022-01-01 - 2022-12-31 (Annual)                | 2022-10-04     |          |                   |         |
| CUPE 2950 Vacation Unpaid Time Off Total      | 0     | Hours        | 2022-10-02 - 2022-10-08 (Weekly - Absence)      | 2022-10-04     |          |                   |         |
| Banked Overtime Termination                   | 0     | Hours        | 2022-10-01 - 2022-10-15 (Semimonthly - Absence) | 2022-10-04     |          |                   |         |



# Existing Workday Support Request

If this webinar provides the answer to an unresolved Workday Support Request and you require no further assistance, please resolve the ticket:

- Go to the [UBC Self Service Portal](#)
- Log in with your CWL and password
- Click on “View My Tickets”
- Select the appropriate ticket from the list
- Click ‘Resolve’ to update the ticket status



# Appendix

# Workday Knowledge Base Articles

Visit the [UBC Workday Knowledge Base](#) for more guides.



- [Adjust Employee's Time Off Balance \(Maintain Actuals\)](#)
- [Request a Leave of Absence](#)
- [Place Worker on Full Leave of Absence](#)
- [Return from a Leave of Absence](#)
- [Return Worker from Leave](#)
- [Place Worker on Partial Medical or Disability Leave](#)
- [Benefit Change: Go on Leave](#)
- [Benefit Change: Return from Leave](#)

# Other Resources



- [Vacation Transfer Calculator](#)
- [UBC Vacation & Leaves](#)
- [Collective Agreements](#)

***Thank You!***