SWEDISH MEDICAL CENTER

Payroll Reporting for Research Staff (Exempt)

Policy and Procedure

Campus: All	**Approved:** July 2005
Department: Swedish Research Center	**Next Review:** June 2007

Purpose

To outline appropriate procedures for recording exempt staff time in the Time & Effort (T&E) application in various leave of absence situations such as unpaid personal leave, unpaid vacation, employee medical FMLA, employee non-medical FMLA, family FMLA, military leave, personal holidays, etc.

Population Covered

All exempt Research Center staff and their managers

Responsible Persons

All Research Center managers

Definitions

Brost Report – The report submitted to the Payroll Department for each employee, which documents the time for which they must be paid, along with the type of hours, the project and/or department number to which the hours should be charged, and the shift in which the hours occurred. The employee is paid based on the information itemized on this report.

Exempt Staff – Salaried staff.

Time & Effort (T&E) Administrator – The Data Analyst in the Research Administration Department.

Time & Effort (T&E) System – The application used by the Research Center to track time and effort worked by all staff. The data in this system is used to produce the Brost Reports.

Forms

Employee Status List Report
Employee Action Form (EAF)
Employee Form Packet (FMLA)

Guidelines (by Type of Leave)

Personal Holidays

Full-time, benefits-eligible exempt employees receive one personal/float holiday per year.

In the T&E application this personal holiday should be recorded in the "Other Hours" section of the report as a "Holiday."

However, in the Brost reports a holiday is always coded the same as regular time worked, which is per Swedish policy.

In the "Comments" section the employee should indicate "Personal Holiday" and the date.

The personal/float holiday for benefits-eligible *part-time* employees should be pro-rated appropriately. (For example, if a salaried employee works 80% FTE, then their holiday time should be marked as 6.4 hours, rather than the 8 hours that a full-time employee would receive.)

Unpaid Vacation

Unpaid vacation may be granted at the manager's discretion for an employee's vacation after an employee uses up all of their accrued vacation time.

This situation is distinct from a formal Personal Leave, which is designed for long-term unpaid absence, and should only be used in short-term vacation situations where benefits are intended to remain continuous and the employee's absence does not create an unreasonable impact upon his or her department.

In no case should unpaid vacation last longer than two months (beyond which point the employee must instead use Personal Leave).

Any employees who need to take one or more days off for a vacation, but who have used up all their vacation time, should still mark their time in the T&E application as "Vacation" time in the "Nonproductive Hours" section of the report.

All vacation days must be reported as such, even if there are not enough vacation days in an employee's "bank" to cover that time.

The Swedish payroll system does not respond correctly if less than the forecasted number of hours is reported for exempt staff. If, for example, an employee works 100% FTE and is forecasted to turn in 80 hours for a pay period, but the Brost report only shows 30 hours, then the system may double-pay the employee erroneously (unless someone in the Payroll Department manually corrects the error). Therefore it is extremely important for the Brost report to reflect the full number of forecasted hours.

The PeopleSoft system will automatically recognize that the employee has run out of vacation time and will not pay out for vacation time unless it is actually available.

Inform the T&E administrator of the situation.

It is very important for the manager to give the T&E administrator a list each pay period of all employees on leave so that she can work with Payroll to ensure that the employee is paid properly and out of the correct "bucket."

T & E administrator will send an email to the exempt employee specialist in the Payroll Department to let her know to double-check the payroll for that employee during the pay period(s) in question so that the employee does not get paid incorrectly.

The Brost report will continue to be submitted for the duration of the unpaid vacation, but as per above, the PeopleSoft system will cease to pay the employee due to the lack of accrued time off.

Ensure that an EAF has been submitted HR documenting the return date of the employee

Inform the T&E administrator of the date of the employee's return.

If an employee's entire pay period consists of unpaid time off, the employee should NOT signify it by creating blank lines in the "Project Hours" section.

The T&E system does not save blank records.

Employee Medical FMLA Leave

Eligible employees with a serious health condition may, with proper notification and documentation, take up to 12 weeks of Medical FMLA Leave within a 12-month period.

Per Swedish policy, they must first use up all accrued sick leave and then all accrued vacation time.

The remainder of the employee's leave shall be unpaid.

Ensure that an EAF has been submitted.

Inform the T&E administrator of the situation.

It is very important for the manager to give the T&E administrator a list each pay period of all employees on leave so that she can work with Payroll to ensure that the employee is paid properly and out of the correct "bucket."

Managers should refer to the Employee Status List Report to determine how much sick leave and vacation time the employee has accrued.

For T&E reporting purposes, sick time should be reported on the employee's T&E report until it is no longer available.

After that, the leave should be reported as vacation time until it is no longer available.

If the employee is still on FMLA status but has no further accrued time, all additional leave should be marked on the T&E report as sick time.

The Brost report will continue to be submitted for the duration of the leave, but the PeopleSoft system will cease to pay the employee when accrued paid leave has been exhausted.

Use the "Enter Leave Hours" tab in the T&E for Managers application to record the number of hours each day that the employee is on leave.

This will enable the manager to track how close the employee is to reaching the maximum number of allowable hours for that leave. (There is also a report available on the "Manager Reports" tab, entitled "Annualized Employee Leave by Category," which summarizes all leave taken by an employee during the previous 12-month period.)

It is the manager's responsibility to track these hours each pay period and to take appropriate action when the maximum is approached.

All final determinations in classifying a leave as FMLA must be determined by Human Resources.

Hours in the Leave Tracking system and the T&E system, as well as associated use of sick and/or other paid time, must match Human Resources' determination of the type of leave.

As there is sometimes a delay in obtaining a final determination of how a leave shall be classified, the manager should make his or her best attempt to categorize employee time according to the best information available at the time, with the understanding that the time may be re-classed at a later date if necessary.

Please refer to the "Response to Employee Request for a Leave of Absence" form (a blue form from Human Resources) for further guidance.

Ensure that an EAF has been submitted to HR documenting the return date of the employee.

Inform the T&E administrator of the date of the employee's return.

Maternity Leave

Pregnant employees may, with proper notification and documentation, take Maternity Leave during the time that they are pregnant.

Per Swedish policy, they must first use up all accrued sick leave and then all accrued vacation time.

The remainder of their leave shall be unpaid.

Ensure that an EAF has been submitted to HR.

Inform the T&E administrator of the situation.

It is very important for the manager to give the T&E administrator a list each pay period of all employees on leave so that she can work with Payroll to ensure that the employee is paid properly and out of the correct "bucket."

Refer to the Employee Status List Report to determine how much sick leave and vacation time the employee has accrued.

For T&E reporting purposes, sick time should be reported on the employee's T&E report until it is no longer available.

After that, the leave should be reported as vacation time until it is no longer available.

If the employee is still on Maternity Leave status but has no further accrued time, all additional leave should be marked on the T&E report as sick time.

The Brost report will continue to be submitted, but the PeopleSoft system will cease to pay the employee for the duration of her leave, due to the lack of accrued time off.

Use the "Enter Leave Hours" tab in the T&E for Managers application to record the number of hours each day that the employee is on leave.

This will enable the manager to track how close the employee is to reaching the maximum number of allowable hours for that leave. (There is also a report available on the "Manager Reports" tab, entitled "Annualized Employee Leave by Category," which summarizes all leave taken by an employee during the previous 12-month period.)

It is the manager's responsibility to track these hours each pay period and to take appropriate action when the maximum is approached.

All final determinations in classifying a leave as FMLA must be determined by Human Resources.

Hours in the Leave Tracking system and the T&E system, as well as associated use of sick and/or other paid time, must match Human Resources' determination of the type of leave.

As there is sometimes a delay in obtaining a final determination of how a leave shall be classified, the manager should make his or her best attempt to categorize employee time according to the best information available at the time, with the understanding that the time may be re-classed at a later date if necessary.

Please refer to the "Response to Employee Request for a Leave of Absence" form (a blue form from Human Resources) for further guidance.

Ensure that an EAF has been submitted to HR documenting the return date of the employee.

Inform the T&E administrator of the date of the employee's return.

Parental Leave

Eligible employees who have a new birth in their household, or who have adopted a child or received a foster care placement, may, with proper notification and documentation, take up to 12 weeks of Parental Leave within a 12-month period.

Per Swedish policy, they cannot use sick leave.

They must first use up all accrued vacation time, and then any subsequent leave shall be unpaid.

Ensure that an EAF has been submitted to HR.

Inform the T&E administrator of the situation.

It is very important for the manager to give the T&E administrator a list each pay period of all employees on leave so that she can work with Payroll to ensure that the employee is paid properly and out of the correct "bucket."

Refer to the Employee Status List Report to determine how much sick leave and vacation time the employee has accrued.

For T&E reporting purposes, vacation time should be reported on the employee's T&E report for the entire duration of the Parental Leave.

The Brost report will continue to be submitted for the duration of the leave, but the PeopleSoft system will cease to pay the employee due to the lack of accrued time off.

Use the "Enter Leave Hours" tab in the T&E for Managers application to record the number of hours each day that the employee is on leave.

This will enable the manager to track how close the employee is to reaching the maximum number of allowable hours for that leave. (There is also a report available on the "Manager Reports" tab, entitled "Annualized Employee Leave by Category," which summarizes all leave taken by an employee during the previous 12-month period.)

It is the manager's responsibility to track these hours each pay period and to take appropriate action when the maximum is approached.

All final determinations in classifying a leave as FMLA must be determined by Human Resources.

Hours in the Leave Tracking system and the T&E system, as well as associated use of sick and/or other paid time, must match Human Resources' determination of the type of leave.

As there is sometimes a delay in obtaining a final determination of how a leave shall be classified, the manager should make his or her best attempt to categorize employee time according to the best information available at the time, with the understanding that the time may be re-classed at a later date if necessary.

Please refer to the "Response to Employee Request for a Leave of Absence" form (a blue form from Human Resources) for further guidance.

Ensure that an EAF has been submitted to HR documenting the return date of the employee.

Inform the T&E administrator of the date of the employee's return.

Family FMLA Leave

Eligible employees who have an immediate family member (i.e., a dependent child, spouse, parent, domestic partner, grandparent, or in-law) with a serious health condition may, with proper notification and documentation, take up to 12 weeks of Family FMLA Leave within a 12-month period.

Per Swedish policy, employees taking this type of leave may choose the order in which the accrued time off is used.

All paid time off must be used before going unpaid.

If the employee does not choose the order in which to use his or her accrued time, then they will first use up all accrued sick time and then all accrued vacation time.

The remainder of their leave shall be unpaid.

Ensure that a PAF has been submitted to HR.

Inform the T&E administrator of the situation.

→ **It is very important for the manager to give the T&E administrator a list each pay period of all employees on leave so that she can work with Payroll to ensure that the employee is paid properly and out of the correct "bucket."**

Refer to the Employee Status List Report to determine how much sick leave and vacation time the employee has accrued.

For T&E reporting purposes, sick time should be reported on the employee's T&E report until it is no longer available.

After that, the leave should be reported as vacation time until it is no longer available.

→ **If the employee has chosen to use accrued time in the reverse order, then record the employee's selections appropriately.**

If the employee is still on Family FMLA Leave status but has no further accrued time, all additional leave should be marked on the T&E report as sick time.

→ **The Brost report will continue to be submitted for the duration of the leave, but the PeopleSoft system will cease to pay the employee due to the lack of accrued time off.**

Use the "Enter Leave Hours" tab in the T&E for Managers application to record the number of hours each day that the employee is on leave.

→ **This will enable the manager to track how close the employee is to reaching the maximum number of allowable hours for that leave. (There is also a report available on the "Manager Reports" tab, entitled "Annualized Employee Leave by Category," which summarizes all leave taken by an employee during the previous 12-month period.)**

→ **It is the manager's responsibility to track these hours each pay period and to take appropriate action when the maximum is approached.**

Please note that all final determinations in classifying a leave as FMLA must be determined by Human Resources.

→ **Hours in the Leave Tracking system and the T&E system, as well as associated use of sick and/or other paid time, must match Human Resources' determination of the type of leave.**

→ **As there is sometimes a delay in obtaining a final determination of how a leave shall be classified, the manager should make his or her best attempt to categorize employee time according to the best information available at the time, with the understanding that the time may be re-classed at a later date if necessary.**

→ **Please refer to the "Response to Employee Request for a Leave of Absence" form (a blue form from Human Resources) for further guidance.**

Ensure that an EAF has been submitted to HR documenting the return date of the employee.

Inform the T&E administrator of the date of the employee's return.

Employee Medical Non-FMLA Leave

1. Eligible employees with a serious health condition which continues beyond the 12 weeks of FMLA Leave, or which is not eligible for FMLA Leave, may, with proper notification and documentation, take up to 6 months of Medical Non-FMLA Leave.
2. Per Swedish policy, they must first use up all accrued sick leave and then all accrued vacation time.
3. The remainder of their leave shall be unpaid.

   → **Benefits will only be provided through the last day of the month in which the employee has paid time accrued.**
4. Ensure that an EAF has been submitted to HR.
5. Inform the T&E administrator of the situation.

   → **It is very important for the manager to give the T&E administrator a list each pay period of all employees on leave so that she can work with Payroll to ensure that the employee is paid properly and out of the correct "bucket."**
6. Refer to the Employee Status List Report to determine how much sick leave and vacation time the employee has accrued.
7. For T&E reporting purposes, sick time should be reported on the employee's T&E report until it is no longer available.

8. After that, the leave should be reported as vacation time until it is no longer available.
   - → **If the employee has chosen to use accrued time in the reverse order, then record the employee's selections appropriately.**
9. If the employee is still on Medical Non-FMLA status but has no further accrued time, all additional leave should be left blank for the remainder of the employee's last T&E report.
10. Inform the T&E Administrator that the employee's accrued time off has run out.
   The actual hours will probably differ from the forecasted hours, and the T&E administrator will need to manually mark the Brost report when it is printed so that it shows the correct totals.
   The T&E administrator will need to turn the Brost reports off for that employee after the final report (showing paid time) is printed.
11. Use the "Enter Leave Hours" tab in the T&E for Managers application to record the number of hours each day that the employee is on leave.
   - → **This will enable the manager to track how close the employee is to reaching the maximum number of allowable hours for that leave. (There is also a report available on the "Manager Reports" tab, entitled "Annualized Employee Leave by Category," which summarizes all leave taken by an employee during the previous 12-month period.)**
   - → **It is the manager's responsibility to track these hours each pay period and to take appropriate action when the maximum is approached.**
12. All final determinations in classifying a leave as FMLA must be determined by Human Resources.
   - → **Hours in the Leave Tracking system and the T&E system, as well as associated use of sick and/or other paid time, must match Human Resources' determination of the type of leave.**
   - → **As there is sometimes a delay in obtaining a final determination of how a leave shall be classified, the manager should make his or her best attempt to categorize employee time according to the best information available at the time, with the understanding that the time may be re-classed at a later date if necessary.**
   - → **Please refer to the "Response to Employee Request for a Leave of Absence" form (a blue form from Human Resources) for further guidance.**
13. Ensure that an EAF has been submitted to HR documenting the return date of the employee.
14. Inform the T&E administrator of the date of the employee's return.

Intermittent Leave

1. With proper documentation, Intermittent Leave may be permitted in conjunction with Employee Medical FMLA Leave, Maternity Leave, Parental Leave, Family FMLA Leave, or Employee Medical Non-FMLA Leave.
   - → **Even in the case of Employee Medical Non-FMLA Leave (which would normally involve a cutoff of benefits after the last day of the month in which the employee has paid time accrued) an employee on Intermittent Leave who works at least a partial day each week will be able to sustain their benefits.**
2. Alert the T&E administrator immediately to the situation.
   - → **It is very important for the manager to give the T&E administrator a list each pay period of all employees on leave so that she can work with Payroll to ensure that the employee is paid properly and out of the correct "bucket."**
3. If an employee on Intermittent Leave works part of a week, then the remainder of the week should be coded as nonproductive time if it is available (i.e., either vacation time or sick leave, depending on what is appropriate for the type of leave; see above).

4. If no further accrued leave remains in the employee's "bank," then the employee will still be paid out of their home cost center.
   - → **If a salaried employee works any time at all during a week in which they are on approved Intermittent Leave – even if it's just for an hour – then they will get paid for the full week, whether it's from their accrued vacation or sick time, or alternatively from their home cost center as regular project hours.**
5. If they don't work at all during a week, and if they're out of accrued vacation and/or sick time, they will not get paid for that week.
6. While the above-mentioned rules apply to a one-week period of time, a pay period is of course two weeks long, and the T&E application calculates hours on a two-week basis.
   - → **If any productive time at all is entered in the T&E application for a given pay period for an exempt salaried employee, the application will automatically recalculate all of the productive hours recorded for each project – in both week one and week two – such that the total hours for the pay period equal the forecasted hours.**
   - → **It is acceptable to allow the application to make this automated adjustment assuming that:**
     - ♦ **all productive hours were assigned to the employee's home cost center;**
     - ♦ **the employee worked during each of the two weeks in the pay period; and**
     - ♦ **the employee has no further qualified nonproductive time remaining.**
   - → **But if any of those assumptions is false, then the manager will need to ensure that the employee's T&E report is filled out according to certain specific rules, as fit the circumstances, in order to ensure that the employee is paid correctly.**
     - ♦ **For example, if some of the productive hours were assigned to a project that is not part of the employee's home cost center, then all of the remaining hours for that week need to be explicitly recorded as being worked in the home cost center, using the Project Hours section of the T&E report. (The Comments section should be used for tracking purposes, to explain those project hours.)**
     - ♦ **As another example, if the employee only worked during week one of the pay period, then all time for the week in which the employee did not work needs to be recorded as either vacation or sick time, depending on what is appropriate for the type of leave (see above), and the manager should also ensure that the remaining time in the week in which the employee did work is coded in such a way that it will be credited corrected to the home cost center as per the previous example.**

   As another example, if the employee still has vacation or sick time remaining, and the type of leave that they've been granted allows/requires the use of that accrued nonproductive time, then all of the remaining hours (i.e., hours not worked) during a week in which an employee worked must be explicitly recorded as vacation or sick time.
7. If the employee is on Intermittent Leave due to a Worker's Compensation injury, the rules for filling out the T&E report are different.

   Refer to the procedure for Workers' Compensation Disability Leave for more information.

8. Any questions about how to fill out the T&E report for specific situations should be referred to either the Director of Research or the T&E administrator.
9. Use the "Enter Leave Hours" tab in the T&E for Managers application to record the number of hours each day that the employee is on leave.
   → **This will enable the manager to track how close the employee is to reaching the maximum number of allowable hours for that leave. (There is also a report available on the "Manager Reports" tab, entitled "Annualized Employee Leave by Category," which summarizes all leave taken by an employee during the previous 12-month period.)**
   → **It is the manager's responsibility to track these hours each pay period and to take appropriate action when the maximum is approached.**
10. All final determinations in classifying a leave as FMLA must be determined by Human Resources.
   → **Hours in the Leave Tracking system and the T&E system, as well as associated use of sick and/or other paid time, must match Human Resources' determination of the type of leave.**
   → **As there is sometimes a delay in obtaining a final determination of how a leave shall be classified, the manager should make his or her best attempt to categorize employee time according to the best information available at the time, with the understanding that the time may be re-classed at a later date if necessary.**
   → **Please refer to the "Response to Employee Request for a Leave of Absence" form (a blue form from Human Resources) for further guidance.**
11. Ensure that an EAF has been submitted to HR documenting the date that the employee's leave ends.
12. Inform the T&E administrator of the date of the employee's return.

Military Leave of Absence

1. Employees in the military may, with proper notification and documentation, go onto Military Leave of Absence (LOA) according to the following guidelines.
2. Employees in the Military Reserve Unit or National Guard are entitled to take up to ten (10) days of Military LOA per year.
3. Employees who are called up for active duty will receive additional leave in accordance with relevant federal statutes.
4. Employees on Military LOA have the option of using their accrued vacation time while they are on leave, or they can instead choose to take unpaid leave for the entirety of their absence.
   If the Military LOA is for active duty, benefits will only be provided through the last day of the month in which the employee has paid time accrued.
5. Ensure that an EAF has been submitted to HR.
6. Inform the T&E administrator of the situation.
   → **It is very important for the manager to give the T&E administrator a list each pay period of all employees on leave so that she can work with Payroll to ensure that the employee is paid properly and out of the correct "bucket."**
7. If the employee wishes to use vacation time for part of his or her Military LOA, the employee's manager should refer to the Employee Status List Report to determine how much vacation time the employee has accrued.
8. For T&E reporting purposes, if an employee on reserve duty wishes to use vacation time, it should be coded as "Vacation" for the duration of the reserve duty.
   → **If the employee runs out of vacation time before the reserve duty is over, the PeopleSoft system will recognize that situation and will only pay the employee for annual leave that has been accrued.**

9. If the employee on reserve duty chooses to take unpaid leave, then that time needs to be coded in the Peoplesoft system as “MLA” so that sick leave, vacation, and pension benefits still accrue.
   → **In the current version of the T&E database there is not an option for Military Leave, so leave the absent days blank on the T&E report and inform the T&E administrator. She will ensure that the employee is credited properly. (The next release of T&E will include an option for Military Leave which will accommodate this situation.)**
10. If the employee is on reserve duty for the entire duration of the pay period, then create a T&E report but leave the hours blank, and notify the T&E administrator so that she can ensure that the employee is credited properly.
11. If the employee is called up for active military duty, the employee will also need to be credited with “MLA” time.
   → **A Brost report will need to be created for each pay period that the employee is on active duty.**
   → **As above, the manager should leave the hours blank (until the next release of T&E, at which point all absent hours should be coded “Military Leave”) and inform the T&E administrator so she can ensure that the employee is credited properly**.
12. Use the “Enter Leave Hours” tab in the T&E for Managers application to record the number of hours each day that the employee is on leave.
   → **This will enable the manager to track how close the employee is to reaching the maximum number of allowable hours for that leave. (There is also a report available on the “Manager Reports” tab, entitled “Annualized Employee Leave by Category,” which summarizes all leave taken by an employee during the previous 12-month period.)**
   → **It is the manager’s responsibility to track these hours each pay period and to take appropriate action when the maximum is approached.**
13. Ensure that an EAF has been submitted to HR documenting the return date of the employee.
14. Inform the T&E administrator of the date of the employee’s return.

Workers’ Compensation Disability Leave

1. An employee who is injured on the job and requires a leave of absence may, with proper documentation and approval, take a medical leave of absence.
2. If they qualify, they may go on Employee Medical FMLA Leave; otherwise, they may go on Employee Medical Non-FMLA Leave.
3. In no case, per Swedish policy, may they extend their on-the-job injury leave to Personal Leave.
4. Please see above for the appropriate procedures for either FMLA or Non-FMLA Leave.
5. After an injury is reported, there is a three calendar-day wait period before Workers’ Compensation Leave officially begins.
   → **If any of those three calendar days falls on a work day, those days should be coded as sick time if the employee has any sick leave available.**
   → **The manager should refer to the Employee Status List Report.**
      ♦ **If no sick leave is available, then code it to vacation leave if that is available.**
      ♦ **If the employee has no leave accrued at all, then code it to sick time and the system will know not to pay it out.**
6. After that, the Workers’ Compensation Leave begins.
   → **From that point forward, if the employee works any time at all, then that should be recorded in the T&E system to the nearest 15-minute increment.**

→ **Any unworked portion of the employee's shift should be left blank per normal Intermittent Leave policy.**

→ **After the Brost report is turned in at the end of the pay period, Payroll will inform the Risk Management Department how many hours during the pay period were not worked due to the injury, and the employee will be duly compensated according to the established Workers' Compensation formulas.**

7. A potential complication is, if the employee is still totally disabled after the 14th day from his or her injury, then the beginning of the Workers' Compensation Leave is re-adjusted to begin on the first day of the injury and the three-day wait period is waived.

   → **This means that any sick time that was credited to the employee's home cost center during that wait period should be re-classed to come out of the Workers' Compensation budget.**

8. Another potential complication regards the difference between the Workers' Compensation reimbursement and the employee's regular rate of pay.

   → **Although the Workers' Compensation formula varies somewhat from one employee to another depending upon certain circumstances, the standard Workers' Compensation reimbursement usually comprises approximately 60% of an employee's regular salary; and, although it is not taxed, it still usually doesn't quite match the full amount of an employee's net take-home pay.**

   → **As such, the employee has the option of requesting that the difference be made up each pay period via a dispersal from his or her sick leave (or vacation leave, if the sick leave has been completely expended).**

   → **The calculation for that dispersal, however, is not done until after the employee's Brost report has been submitted to Payroll.**

   → **After Payroll sends the Risk Management Department a copy of the employee's payroll report, Risk Management determines how much the employee will receive from the Workers' Compensation fund, and then they work with Payroll to ensure that the employee receives the correct amount of supplemental pay from the employee's sick or vacation leave to equal a "regular" paycheck.**

   → **All of this occurs after the Research Center sends over the Brost report, and there is no way to determine ahead of time what that supplemental amount will be. But since that supplemental pay will obviously be coming out of the employee's home cost center, it is important that the time be documented in the T&E system.**

   → **As such, the Grants & Contracts Specialist will be responsible for checking the reports after the end of the pay cycle to identify how many supplemental hours were credited to the employee, and he or she will inform the T&E administrator.**

   → **The T&E administrator will ensure that the supplemental hours are added to the employee's T&E records with appropriate comments to explain why those hours have been retroactively recorded.**

9. If an Intermittent Leave is involved, the T&E reporting procedures are different for this situation than they would be for other types of Intermittent Leave, because in this case the Workers' Compensation program would pay the employee for the time that they did not work. *[***Note: The procedures for this situation are still being worked out with the Payroll Department. Please consult with the T&E administrator if this situation arises before additional procedures are released.]*

10. Use the "Enter Leave Hours" tab in the T&E for Managers application to record the number of hours each day that the employee is on leave.

→ **This will enable the manager to track how close the employee is to reaching the maximum number of allowable hours for that leave. (There is also a report available on the "Manager Reports" tab, entitled "Annualized Employee Leave by Category," which summarizes all leave taken by an employee during the previous 12-month period.)**

→ **It is the manager's responsibility to track these hours each pay period and to take appropriate action when the maximum is approached.**

11. All final determinations in classifying a leave as FMLA must be determined by Human Resources.
    → **Hours in the Leave Tracking system and the T&E system, as well as associated use of sick and/or other paid time, must match Human Resources' determination of the type of leave.**
    → **As there is sometimes a delay in obtaining a final determination of how a leave shall be classified, the manager should make his or her best attempt to categorize employee time according to the best information available at the time, with the understanding that the time may be re-classed at a later date if necessary.**
    → **Please refer to the "Response to Employee Request for a Leave of Absence" form (a blue form from Human Resources) for further guidance.**

Personal Leave

1. Eligible employees may, with proper notification and approval, take up to 12 months Personal Leave.
2. According to Swedish policy, they must first use up all accrued vacation time.
    → **Sick time may not be used.**
3. The remainder of their leave shall be unpaid.
    → **Benefits will only be provided through the last day of the month in which the employee has paid time accrued.**
4. If an employee opts to take an unpaid leave of greater than two months in duration, Swedish policy indicates that the leave must be classed as a Personal Leave, rather than unpaid vacation, and the employee's position should be posted.
5. Ensure that an EAF has been submitted to HR documenting the dates of the Personal Leave.
6. Immediately inform the T&E administrator of the situation.
    → **It is very important for the manager to give the T&E administrator a list each pay period of all employees on leave so that she can work with Payroll to ensure that the employee is paid properly and out of the correct "bucket."**
7. Refer to the Employee Status List Report to determine how much vacation time the employee has accrued.
8. For T&E purposes the manager should ensure that the employee's T&E report reflects vacation time for as long as the employee has time available.
9. When all accrued vacation time runs out, the remainder of the employee's last T&E report showing activity should be left blank.
    → **If the employee's forecasted hours do not match with the total hours shown on the Brost report, the T&E administrator will put a note on the employee's report explaining the situation to Payroll.**
    → **Then the T&E administrator will turn the employee's Brost report off so that no further reports are printed for that employee until he or she returns to work.**
10. Use the "Enter Leave Hours" tab in the T&E for Managers application to record the number of hours each day that the employee is on leave.

→ **This will enable the manager to track how close the employee is to reaching the maximum number of allowable hours for that leave. (There is also a report available on the "Manager Reports" tab, entitled "Annualized Employee Leave by Category," which summarizes all leave taken by an employee during the previous 12-month period.)**

→ **It is the manager's responsibility to track these hours each pay period and to take appropriate action when the maximum is approached.**

11. All final determinations in classifying a leave of absence must be determined by Human Resources.
    → **Hours in the Leave Tracking system and the T&E system, as well as associated use of sick and/or other paid time, must match Human Resources' determination of the type of leave.**
    → **As there is sometimes a delay in obtaining a final determination of how a leave shall be classified, the manager should make his or her best attempt to categorize employee time according to the best information available at the time, with the understanding that the time may be re-classed at a later date if necessary.**
    → **Please refer to the "Response to Employee Request for a Leave of Absence" form (a blue form from Human Resources) for further guidance.**
12. Ensure that an EAF has been submitted to HR documenting the return date of the employee.
13. Inform the T&E administrator of the date of the employee's return.

Bereavement Leave

1. All Swedish employees are entitled to paid Bereavement Leave of up to 3 days upon the death of an immediate family member.
    → **Immediate family members are limited to: parents, grandparents, spouse, domestic partner, children, brothers, sisters, or the spouse's or domestic partner's parents, grandparents, children, brothers or sisters.**
    → **Domestic partners are defined as two adults living together in a committed relationship who share the same residence, are jointly responsible for their basic living expenses, and are not married to any other person.**
    → **Domestic partners cannot be related to each other in a way that would legally prevent them from being married to each other.**
2. If the employee is part-time, they will be compensated for the hours that they would normally work.
3. Bereavement Leave is referred to in the T&E application as "Funeral" time, and is tracked in the Other Hours section.
    → **It is classified as productive time and is paid out of the employee's home cost center.**
4. The employee may also receive up to two additional days of leave if round-trip travel of more than 500 miles is required.
5. This additional leave may only be drawn from vacation, or unpaid time if no vacation time is available.
    → **In either case, it should be marked in the T&E application as "Vacation," and an explanation should be recorded in the Comments field.**
6. An employee may also take up to 3 days of leave upon the death of someone who "had a close and significant role in the employee's life," even if the person was not an immediate relative.
    → **The employee may not, however, use Bereavement Leave for this purpose, but must instead use either vacation leave or unpaid time.**

- → **The employee must obtain approval in advance from his or her manager for this type of leave.**
- → **As with regular Bereavement Leave, if round-trip travel of more than 500 miles is required, the employee may choose to use an additional 2 days of either vacation leave or unpaid time for travel days.**

7. All final determinations in classifying a leave of absence must be determined by Human Resources.
   - → **Hours in the Leave Tracking system and the T&E system, as well as associated use of sick and/or other paid time, must match Human Resources' determination of the type of leave.**
   - → **As there is sometimes a delay in obtaining a final determination of how a leave shall be classified, the manager should make his or her best attempt to categorize employee time according to the best information available at the time, with the understanding that the time may be re-classed at a later date if necessary.**
   - → **Please refer to the "Response to Employee Request for a Leave of Absence" form (a blue form from Human Resources) for further guidance.**

Jury Duty Leave

1. Employees will be fully compensated for the entirety of their Jury Duty Leave.
2. There will be no loss of status, seniority, benefits, or position while an employee is on jury duty.
3. Jury Duty Leave is referred to in the T&E application as "Jury" time, and is tracked in the Other Hours section.
   - → **It is classified as productive time and is paid out of the employee's home cost center.**
4. Following jury duty the employee should be instructed to sign over his or her jury duty paycheck, excluding expenses, to Swedish and present it to the Cashier in the Accounting Department.
   - → **This ensures that the employee will not be double-paid.**

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Regulatory Requirement

Family Medical Leave Act (FMLA)

References

Human Resources Standards

Manual

SRC Department Manual

Additional Computer Search Words/Terms

Time & Effort, Time & Effort for Managers, FMLA, Leave

dcr:Management_Policies_RE_Exempt_Leave (12/02/05)