

| Request to Exceed Maximum Vacation Accrual Limit & GTE Form Job Aid |

Background

Requests to Exceed the Maximum Vacation Accrual Limit must be approved at the campus level before there is an update to UCPATH. Once the transaction is updated in UCPATH for approved requests, the Employee will see two vacation buckets in UCPATH, one for regular vacation and one for over the max vacation hours.

Pursuant to [UCR Local Procedure 2.210 – Maximum Vacation Accrual](#) and relevant collective bargaining agreements, employees may be allowed to exceed their maximum vacation accrual limit, if the basis for exceeding the limit is due to exceptional operational circumstances. Employees may be granted up to an additional four months to take vacation leave to allow additional time to bring the accrual balance below the maximum. In addition, employees will continue to accrue vacation during the approved grace period. Qualifying exceptional operational circumstances should be a rare occurrence.

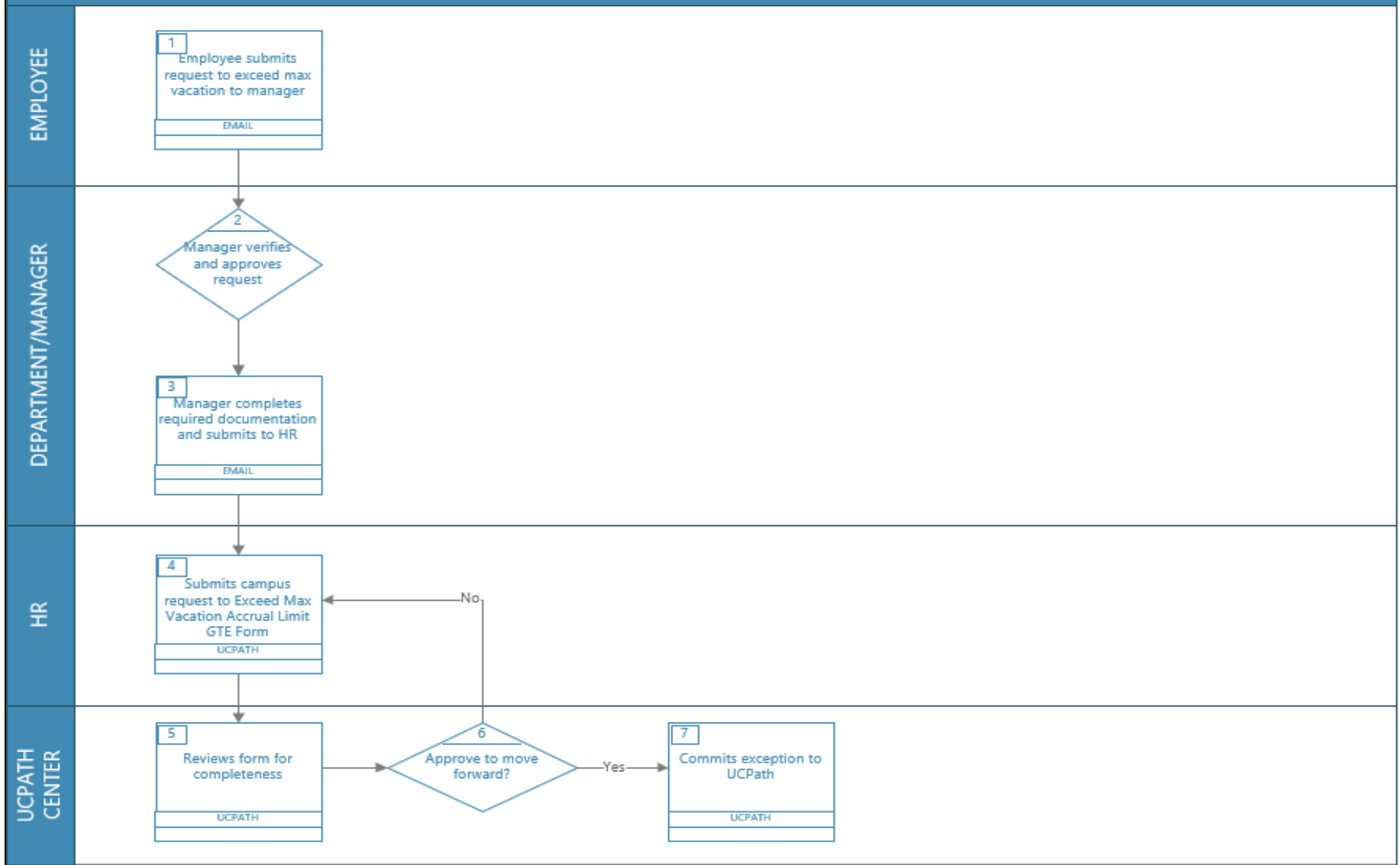
Role	Page
Employee/Manager	1
HR Transactor	2-8

Overview of Required Steps

1. The employee speaks to a manager to request to exceed maximum vacation accrual limit and completes the request form to [“Exceed the Maximum Vacation Accrual Limit”](#).
2. The manager verifies the employee is at or approaching their maximum vacation accrual and approves the exceed maximum vacation request and then completes the request to Exceed the Maximum Vacation Accrual Limit form and submits the request to Human Resources via email at maxvacaform@ucr.edu. Request to exceed maximum vacation should only be sent to HR by the Manager or SSC. Employees must obtain their managers approval prior to the request being sent to HR.
3. The request is entered in to UCPATH by HR once received. The HR point of contact submits the request to Exceed Maximum Vacation Accrual Limit via GTE Form in UCPATH and notifies the submitter by replying to the original email request that the request was submitted to UCPATH for processing.
4. The request to Exceed Maximum Vacation Accrual Limit GTE Form is automatically routed to the UCPATH Center (UCPC), which reviews the form for completeness. If UCPC determines the form to be incomplete, it is sent back to the point of contact in HR (initiator). In those instances, the HR contact will coordinate with the requesting unit to ensure additional details are provided for completeness prior to resending to UCPC.
5. Once the Request to Exceed Maximum Vacation Accrual Limit GTE Form is approved by UCPC, the exception is committed to UCPATH and a notice to the submitter is provided. The HR point of contact will notify the requesting unit of the update by replying to the original email request.

Request to Exceed Maximum Vacation Accrual Limit & GTE Form

REQUEST TO EXCEED MAXIMUM VACATION ACCRUAL LIMIT & GTE FORM



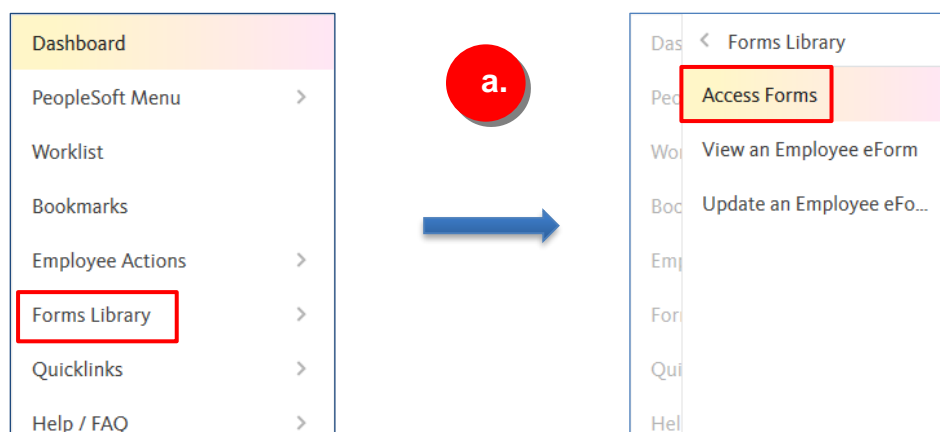
Request to Exceed Maximum Vacation Accrual Limit & GTE Form

Submitting the Request to Exceed Maximum Accrual Limit GTE Form

Step 1 – Department sends email with request form to HR maxvacaform@ucr.edu requesting to exceed maximum vacation accrual limit.

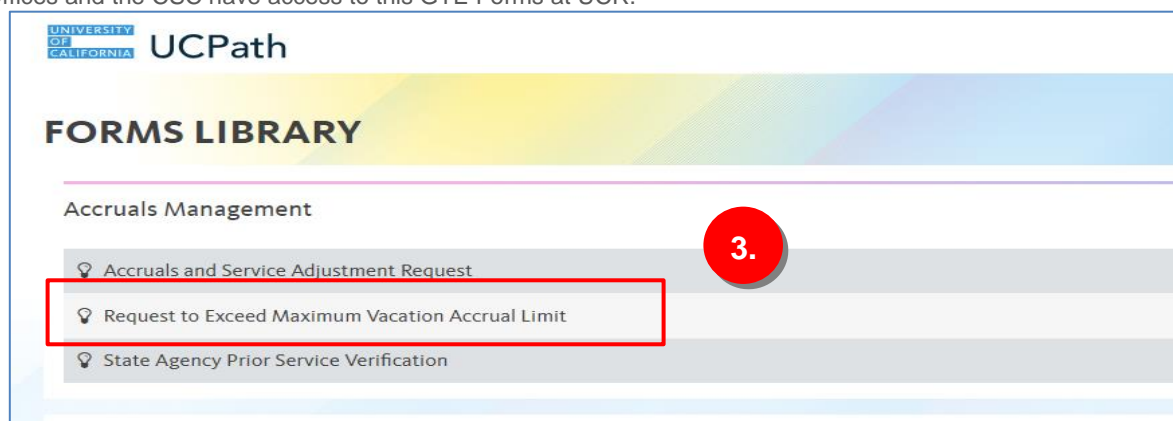
Step 2 –HR point of contact submits the request to Exceed Maximum Accrual Limit GTE Form in UCPATH.

- a. The form is accessed through the Forms Library menu > Access Forms in UCPATH.



Step 3 – The request to Exceed Maximum Vacation Accrual Limit GTE Form is located under the Accruals Management section of the Forms Library. *

*Central Offices and the CSC have access to this GTE Forms at UCR.



Request to Exceed Maximum Vacation Accrual Limit & GTE Form

- a. The **Search By** fields appear. You can search by Empl ID, Empl Record, Display Name and Department. If you are using the Display Name field, you may want to change the operator from the default “Begins With” to “Contains.” Search results will include Display Names that contains the data you entered rather than beginning by it. This will likely yield more results.

SEARCH BY:

Empl ID Begins Wth [text input]

Empl Record Equals [text input]

Display Name Begins Wth [text input]

Department Begins Wth [text input]

Search Clear

a. (points to the search fields)

b. (points to the Search button)

- b. Once you have entered your information in the chosen field(s), click the Search button.
- c. Search result(s) appear under the Search By section. If your search yields many results, use the Quick Filter to quickly filter results.

Quick Filter

This quickly filters the items displayed below

Empl ID	Empl Record	Display Name	Department
[button]	0	[redacted]	D02003
[button]	0	[redacted]	D01039
[button]	0	[redacted]	D02020
[button]	0	[redacted]	D01261
[button]	0	[redacted]	D01103

c. (points to the Quick Filter box)

d. (points to the Empl ID button in the second row)

- d. To initiate an eForm for an employee, click on their Empl ID. The button will turn from blue to pick when selected.

- e. The Request to Exceed Max Vacation for the chosen employee will appear. Employee Information populates automatically based on Job Data.

REQUEST TO EXCEED MAX VACATION
eForm ID: 819

Request Details
This form is used to grant employees additional months to take vacation leave in order to bring the accrual balance below the allowable maximum. Please Note: An asterisk (*) next to a field name indicates a required field.

Employee Information

Empl ID: [REDACTED]	Name: [REDACTED]
Job Title: LOAN SVC MGR 1	Department: 812400 - OFFICE OF LOAN PROGRAMS

Vacation Balance Information

Current Balance: 384.00	Max Balance: 384.00
-----------------------------------	-------------------------------

g. **Number of Months to Extend:** 4 **h.** **Exceptional Circumstances: ***

- f. The Vacation Balance Information section will show the employee's Current Balance and Max Balance. This information is automatically populated.
- g. Under the Vacation Balance Information section, 4 will always default as the Number of Months to Extend. This can be changed to 1, 2, or 3 by selecting the appropriate value from the drop down.
- h. Comments explaining the reason for the request will need to be entered under the Exceptional Circumstances field. This field must be completed.

Request to Exceed Maximum Vacation Accrual Limit & GTE Form

- i. Upcoming scheduled vacation and attachments can be entered. Neither of these fields are required.
- j. Comments can also be entered, but are also not required.
- k. Once the form has been filled, click the Submit button to submit to UCPC for review. To Save the form to submit at a later time, click the Save button. The form will then be available at a future date by going to Forms Library > Update an Employee eForm and searching for the employee.

The screenshot shows a web form titled "Scheduled Vacation" with the following sections:

- Scheduled Vacation:** A table with columns: *Month, *Year, Hours Accrued, Hours Taken, Vacation Balance, Insert A Row, and Delete A Row. A red box highlights the table area, with a red circle containing the letter "i." pointing to it.
- File Attachments:** A section with an "Upload" button, a "View" button, a "Description" field, a "Doc Id" field, and a "Delete" button. A red box highlights this section, with a red circle containing the letter "j." pointing to it.
- Comments:** A text area for entering comments. A red box highlights this area, with a red circle containing the letter "j." pointing to it.
- Buttons:** At the bottom, there are three buttons: "SEARCH", "SUBMIT", and "SAVE". A red box highlights the "SUBMIT" and "SAVE" buttons, with a red circle containing the letter "k." pointing to them.

Request to Exceed Maximum Vacation Accrual Limit & GTE Form

What to Expect after Submitting the Exceed Maximum Vacation Accrual eForm

- If the GTE Form is not approved, it will be returned to the person who submitted the GTE Form (initiator) with comments and correction requirements.
 - The Submitter will receive an email notifying them that an GTE Form has been returned. The email will provide the user with a direct link to the form.
 - The returned GTE Form will also appear on the user's worklist on UCPATH online.
 - Generally, the only reason that this form would not be approved by the UCPATH Center is if the employee is nowhere near the max.

Worklist			View All
Date From	Link	Priority	
04/24/2018	VacLimit eForm - Form ID:786		

REFRESH

- If a prior accrual was lost/missed because the employee already reached the max, the max exception **will automatically begin as of the 1st pay period in which an accrual was lost and the employee will retroactively accrue.**
 - **Example:** The following employee did not accrue for the pay period that ended 5/31/2018. If a max exception were requested for this employee, the exception would begin in that pay period and the employee would retroactively accrue.

Admin - Review Absence Balance							
As of <input type="text" value="05/31/2018"/>							
Date: <input type="text"/>							
Current Balance				Personalize Find <input type="text" value="1"/> <input type="text" value="1"/>			
Leave	Beginning Balance	Taken	Earned	Adjustments	Ending Balance	Accrual Max	Approaching Max
Vacation	384.00	0.00	0.00	0.00	384.00	384.00	Y

Request to Exceed Maximum Vacation Accrual Limit & GTE Form

- Once the Vacation Max Exception is approved, the employee will see this change reflected on UCPATH online (see below) after the next Absence Management (AM) Process is completed at the end of each month in UCPATH.
 - Vacation hours accrued over the employee's maximum will be maintained in a separate 'Additional Vacation' entitlement bucket.
 - Employee will continue to use the "VAC" to report absences.
 - The system has a built-in priority function that will subtract the reported absence from the 'Addl Vacation' balance before subtracting from the regular vacation balance.
 - **Over the max balances are not viewable in TARS.** All over the max balances are managed and viewable in UCPATH. Please refer to the UCPATH Production Processing Schedule for the AM processing timeline.

Current Balance								Personalize	Find	First	1-4 of 4	Last
Leave	Beginning Balance	Taken	Earned	Adjustments	Ending Balance	Accrual Max	Approaching Max					
Service Months	218.00	0.00	1.00	0.00	219.00	0.00	0					
Vacation	336.00	0.00	0.00	0.00	336.00	336.00	Y					
Addl Vacation	49.40	24.00	14.22	0.00	39.62	0						
Sick	1621.38	0.00	8.12	0.00	1629.51	0.00	0					

Disclaimer : Ending balances only reflect absences that have been processed as of the date displayed. For the most up-to-date FMLA balance, please contact your local leave administrator.

Accrual For Pay Period By Appointment											Personalize	Find	First	1-3 of 3	Last
Empl Record	Eligibility Group	Department	Position	Job Code	Pay Period Hours	Service	Vacation Factor	Vacation Accrued	Sick Factor	Sick Accrued					
0	STAFF99	Kerckhoff Coffeehouse	ANL 5	ANL 5	88.00	Y	0.080769	7.107672	0.046154	4.061552					
1	STAFF99	Catering	ANL 5	ANL 5	44.00	Y	0.080769	3.553836	0.046154	2.030776					
2	STAFF99	Music Cafe	ANL 5	ANL 5	44.00	Y	0.080769	3.553836	0.046154	2.030776					