Vacation/Sick Leave
Toolbox Resource

Update June 2010
Toolbox Resource

- To receive credit for this tutorial, you must login to www.trainsweb.gatech.edu, select “Free Tutorials” and complete the assessment at the end of the tutorial.
- This tutorial is a required pre-requisite for access to the HRMS/PeopleSoft Vacation/Sick panels and reports.
- Send all training inquiries to pay.ask@ohr.gatech.edu.
Tutorial Guide Contents

• Vacation and Sick Policy Statements
• Vacation/Sick Leave & Retention Policies & Procedures
• How to enter and correct Vacation & Sick hours
• How to calculate Vacation/Sick Leave balances
• How to use the Vacation Payout Calculators
• How to run HRMS Vacation/Sick Reports
• Data Errors Messages and how to correct them
• Monthly employees must report their vacation and sick leave hours to their appropriate supervisor immediately following each monthly pay period.

• Each employee must submit a Vacation/Sick form even if zero hours are reported.

• Supervisors must approve (sign and date the vacation/sick leave form) and submit it to the Department’s Vacation/Sick Administrator.

• The Vacation/Sick Administrators must enter the leave data on the HRMS/PeopleSoft panels and are responsible for maintaining the official leave records for each employee.

• The official Georgia Tech Vacation/Sick Leave Policy is located at http://www.admin-fin.gatech.edu/human/attendance/021500.html.

• Complete details are also included in the Georgia Tech Employee Handbook.
Vacation and Sick Policy Statements

• Vacation and sick hours for monthly employees must be entered on the HRMS/PeopleSoft Vacation/Sick panels within the first 10 business days of each month.

• **PeopleSoft does not allow individuals to update their own records.** If you are a monthly employee and the authorized Department Vacation/Sick Administrator, another authorized Department Vacation/Sick Administrator within your department must enter your leave hours. All Georgia Tech departments should have at least two Vacation/Sick Administrators (primary and backup) to complete all PeopleSoft data entry.

• Monthly vacation and sick accrual hours are not be updated in PeopleSoft until the current monthly pay period has ended and OHR-Payroll has completed all processing.

• **Vacation and Sick hours may not be charged against the monthly accrual hours that are earned in the same pay period.** Doing so will put the employee in a non-pay status for the overdrawn hours. The Department Vacation/Sick Administrator must send an email to pay.ask@ohr.gatech.edu requesting that overdrawn hours be taken from future pay periods.
Department Vacation/Sick Administrators are the official custodians of the leave documents. Each department is responsible for providing a Vacation/Sick Leave form to each employee that includes: Pay Period (Month and Year), vacation and sick hours taken, employee’s signature, and the immediate supervisor’s signature.

All of the Department’s leave forms should be organized and maintained in a secure location, easily retrievable on request by GA Tech, Federal, and State Auditors. The forms are sometimes required for the Teacher’s Retirement System Certification.

Leave forms must be retained for a minimum of five current fiscal years for audit and review. The prior and current fiscal years must be retained in the immediate office area; three prior fiscal years should be maintained within the building, preferably in the department’s designated archive section. Records should then be transferred to the Institute’s Archive at the appropriate time.

Documents Required to Keep:
- Each employee’s Vacation/Sick Leave Form

Recommended Documents to Keep:
- Final Validation Report
**Employment and Termination Effective Dates:**

During the first month of employment, an employee must begin working on or before the 15\textsuperscript{th} and must work through the end of the month in order to accrue any vacation hours for the month. Vacation hours will not accrue for a month in which employment begins on the 16\textsuperscript{th} or later.

For employees terminating before the 15\textsuperscript{th}, vacation hours do not accrue for that month; it will accrue if the employee’s last working day is on or after the 15\textsuperscript{th}.

**NOTE:** PeopleSoft will post current month accruals based on the employee’s accrual rate (number years of service) regardless of the effective date of hire, termination, retirement, etc. Vacation/Sick Administrators must review employees’ accrual balances and request adjustments as needed to ensure accurate leave accrual balances.

For more info, go to the [BOR webpage](https://www.bor.gatech.edu) regarding updated Vacation/Sick policy
During the 1999 legislative session funding was secured to support the Sick Leave legislation passed in the 1998 legislative session. The full funding will allow the Teachers Retirement System of Georgia (TRS) to grant one month of service credit, up to one year, for each 20 days of accrued sick leave for which a member has not used or been paid.

Full disclosure of TRS policy regarding sick leave credit towards retirement is located at www.trsga.com/sickleavecredit.asp
How to make Adjustments/Corrections:

- Within the first 10 business days of each month, Vacation/Sick Administrators can correct leave hours on the HRMS Vacation/Sick Panels for the current month only. After the 10th day, Vacation/Sick Administrators must request to Payroll all leave adjustments for previous pay periods on the GA Tech Sick & Vacation Adjustment Request Form.

- See “HRMS Panel Corrections” in this Guide on how to enter current month panel corrections.

- Download and complete the [Georgia Tech Sick & Vacation Adjustment Request Form](http://www.ohr.gatech.edu/payroll/time) and attach to an email to pay.ask@ohr.gatech.edu or fax to: 404-894-0944.
Getting Started

Go to www.techworks.gatech.edu

Faculty & Staff Sign-In

GT Account: [ ]
Password: [ ]

Login [ ] Reset [ ]

Account/Password Information
Change Password

Login with your GT Account/password
Navigate to the HRMS Vac/Sick Panels:
Employee Search Tips

- **All Department Monthly Employees:** Enter Dept ID
- **Individual Employees:** Enter Empl ID or Last Name

**GT Vac/Sick Entry**
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

- Name:
- EmplID:
- Department SetID:
- Home Department ID:
- Home Department:
- Last Name:

[Check for Case Sensitive]

[Search] [Clear] [Basic Search] [Save Search Criteria]
Employee Search Tips

Click column headings to Sort Name for Alpha Order

<table>
<thead>
<tr>
<th>Name</th>
<th>EmplID</th>
<th>Empl Rcd#</th>
<th>Department</th>
<th>SetID</th>
<th>Home Department</th>
<th>ID</th>
<th>Home Department</th>
<th>Last Name</th>
<th>Payroll Office</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cooper,Berette T</td>
<td>84359</td>
<td>0</td>
<td>GT</td>
<td>770</td>
<td>Payroll Office</td>
<td></td>
<td>Payroll Office</td>
<td>COOPER</td>
<td></td>
</tr>
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<td>Dupree,Eulalia J</td>
<td>419891</td>
<td>0</td>
<td>GT</td>
<td>770</td>
<td>Payroll Office</td>
<td></td>
<td>Payroll Office</td>
<td>DUPREE</td>
<td></td>
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<td>English,Celestine M</td>
<td>111815</td>
<td>0</td>
<td>GT</td>
<td>770</td>
<td>Payroll Office</td>
<td></td>
<td>Payroll Office</td>
<td>ENGLISH</td>
<td></td>
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<td>Ferguson,Edward Taylor</td>
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<td>FERGUSON</td>
<td></td>
</tr>
<tr>
<td>Fogarty,Marvann Claire</td>
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<td>0</td>
<td>GT</td>
<td>770</td>
<td>Payroll Office</td>
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<td>Payroll Office</td>
<td>FOGARTY</td>
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<td>Payroll Office</td>
<td></td>
<td>Payroll Office</td>
<td>MARTIN</td>
<td></td>
</tr>
</tbody>
</table>
Review Employee Information

Review default data before entering information:
- Name and Empl ID
- Dept #s
- Pay Period

GT Vac/Sick Entry

- Name: Washington, Denzel
- Emplid: 410000
- Empl Rcd#: 0
- Pay Group: Fiscal Monthly (Benefits)
- Payroll Office
- Home SetID: GT
- Home Department: 770
- Work SetID: GT
- Work Department: 770
- Vacation Leave Balance: 356.00
- Sick Leave Balance: 1019.00
- Period End Date: 04/30/2007
- Vacation Leave Hours: 0.00
- Sick Leave Hours: 0.00
**Note:** Academic Faculty accrue **sick hours ONLY**

Vacation Leave is always “0”
Policy Statement: “Vacation and sick hours for monthly employees **MUST** be entered on the HRMS/PeopleSoft Vacation/Sick panels within the first 10 business days of each month.”

Example: Mr. Washington took 16 vacation hours and 8 sick hours in March and turned in the Vac/Sick Leave Form on April 2nd. The Dept Vacation/Sick Administrator must enter March leave hours within the first 10 business days of April.
Panel Navigation Features

Use to Menu Bar Buttons for easy Navigation

SAVE your data entry

Return to the Previous Monthly Employee

Advance to the Next Monthly Employee

Search Results

Use to Browser Print Button to print Reports
After all of the leave hours have been entered, use the Vacation/Sick Validation Report to verify data entry.

The Vacation/Sick panels are available for data entry and adjustments within the first 10 business days of each month.

Run the Validation Report as often as necessary until all data entry is correct.
How to Run the Validation Report

Navigate: My HR>Reports>Vac/Sick Validation

Enter your Run Control ID, then press Search.
How to Run the Validation Report

Enter Report Parameters

SetID: GT
Enter Dept ID: 3 digit number
Pay Period End Date: mm/dd/year

For individual employee Enter Empl ID:

> Click Run
> Click OK on the Process Scheduler Page
> Go to Report Manager to view Reports
Vac/Sick Validation Report

*Excess Hours* are leave hours that are more than the employee has accrued. Excess hours will cause an employee to go into Non-Pay Status. The Vac/Sick Administrator must request via email at pay.ask@ohr.gatech.edu to charge future payrolls for the excess hours.

*See “Error Messages” in this Guide about how to correct Excess Hours*

<table>
<thead>
<tr>
<th>Name</th>
<th>Empid</th>
<th>Rcd Nbr</th>
<th>Paygroup</th>
<th>Pay End Dt</th>
<th>Vac Hours</th>
<th>Sick Hours</th>
<th>Sick Excess</th>
<th>Vac Excess</th>
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<td>31-MAR-2010</td>
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</tr>
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<td>8.00</td>
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<td>15.00</td>
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</tr>
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<td>31-MAR-2010</td>
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<td>31-MAR-2010</td>
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<td>0.00</td>
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<tr>
<td></td>
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<td></td>
<td>31-MAR-2010</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Total Number of Records: 12
HRMS Panel Corrections

Vacation/Sick panel corrections can be made within the first 10 business days of each month **for the current month only.** After the 10\textsuperscript{th} day, use the GA Tech Sick & Vacation Adjustment Form to submit adjustments to OHR-Payroll.

Navigate to Vacation/Sick Leave, enter search parameters to retrieve employee’s record:

![Image of a screen showing vacation and sick leave hours]

Enter the correct vacation/sick leave by **overwriting** the incorrect amount. Do not enter negative amounts. **Press Save.**

![Image of a screen showing updated vacation and sick leave hours]
Use the [GA Tech Sick & Vacation Adjustment Request Form](link to: www.ohr.gatech.edu/payroll/time) to report all adjustments *after* the first 10 business days of each month.
### Leave Balance Formula:

\[
\text{current leave balance} = \frac{\text{balance from last pay period} - \text{reported leave} + \text{accruals in last pay period}}{\text{December Vacation Balance}}
\]

414 HRS

68 HRS

14 HRS

360 HRS
Vacation Calculators are Excel spreadsheets with embedded formulas that allow simple data entry to calculate bottom-line vacation balances and payout amounts. The vacation balance is then recorded on the terminating PSF (or final timesheet for bi-weekly employees).

Navigate to:

HR Administration
Frequent Links
Bi-Weekly Vacation Payout Calc
or
Monthly Vacation Payout Calc
Calculate Monthly Vacation Payout for Employees terminating/retiring (100% EFT)

### Monthly Vacation Payout Calculation

**IMPORTANT!!**

Before you enter any data, make sure that the Analysis ToolPak is turned on:

1. Go to the Tools menu and click on Add-Ins...
2. Make sure a checkmark appears next to Analysis ToolPak
3. Click on OK.

<table>
<thead>
<tr>
<th>Academic Contract Employee (9 Month Contract)?</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Termination/Retirement Date</td>
<td>09/01/07</td>
</tr>
<tr>
<td>Pay Period End Date</td>
<td>07/31/07</td>
</tr>
<tr>
<td>Years of Service</td>
<td>14 years</td>
</tr>
<tr>
<td>Vacation Time Taken for Current Pay Period</td>
<td>8 hours</td>
</tr>
<tr>
<td>Accrued Vacation Balance as of Last Pay Period</td>
<td>246 hours</td>
</tr>
<tr>
<td>Accrued Vacation Time for Current Pay Period</td>
<td>14 hours</td>
</tr>
<tr>
<td>% Time Worked during Current Pay Period</td>
<td>100%</td>
</tr>
<tr>
<td>Adjusted Vacation Time Accrued for Current Pay Period</td>
<td>14 hours</td>
</tr>
<tr>
<td>Balance for Payout</td>
<td>246 hours</td>
</tr>
</tbody>
</table>

---

To look up # of years of service, go to:
Workforce Administration>>Job Information>>
Job Data>>Employment Data>>
Employment Information

To look up annual rate of pay, go to:
Workforce Administration>>Job Information>>
Job Data>>Compensation>>Pay Rate

**Comments? Questions? Suggestions?**
Please send an email to pay.ask@ohr.gatech.edu

**246 is recorded on the PSF**
Calculate Monthly Vacation Payout for Employees terminating/retiring (less than 100% EFT)

## Monthly Vacation Payout Calculation

**IMPORTANT!!!**

Before you enter any data, make sure that the Analysis ToolPak is turned on:

1. Go to the Tools menu and click Add-Ins...
2. Make sure that a checkmark appears next to Analysis ToolPak
3. Click on OK.

### Academic Contract Employee (9 Month Contract)?
No

<table>
<thead>
<tr>
<th>Termination/Retirement Date</th>
<th>08/01/07</th>
<th>First day that employee IS NOT employed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Period End Date</td>
<td>07/31/07</td>
<td>To look up # of years of service, go to Workforce Administration&gt;&gt;Job Information&gt;&gt;Job Data&gt;&gt;Employment Data&gt;&gt;Employment Information</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Years of Service</th>
<th>14 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation Time Taken for Current Pay Period</td>
<td>8 hours</td>
</tr>
<tr>
<td>Accrued Vacation Balance as of Last Pay Period</td>
<td>240 hours</td>
</tr>
<tr>
<td>Accrued Vacation Time for Current Pay Period</td>
<td>14 hours</td>
</tr>
<tr>
<td>% Time Worked during Current Pay Period</td>
<td>80%</td>
</tr>
<tr>
<td>Adjusted Vacation Time Accrued for Current Pay Period</td>
<td>11 hours</td>
</tr>
<tr>
<td>Balance for Payout</td>
<td>243.2 hours</td>
</tr>
</tbody>
</table>

243.2 hours recorded on the PSF

### Financial Details

- **Annual Rate of Pay**: $60,000,000.00 per year
- **Hourly Rate of Pay**: $28.846154 per hour
- **$ Value for Payout**: $7,015,384.815

Comments? Questions? Suggestions? Please send an email to pay.ask@ohr.gatech.edu
Accrual Rate Policy

• **Sick Leave Hours**
  - Full-time Employees (100%) = 8 hrs per month
  - Part-time Employees (50%) = 4 hrs per month

• **Vacation Hours** accrual depends on:
  - percent time (full or part time)
  - number of years of service

  *See next two slides in this Toolbox Guide for Vacation Hour Accrual Charts*

• A full description of eligibility requirements and the amount of time accrued for each benefits eligible employee class can be found at the OHR website under Policies and Procedures.
## Monthly Accrual Rates

<table>
<thead>
<tr>
<th>VACATION</th>
<th>ACCRUAL RATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 5 years</td>
<td>10.00 hours per month</td>
</tr>
<tr>
<td>5 – 10 years</td>
<td>12.0 hours per month</td>
</tr>
<tr>
<td>10 years plus</td>
<td>14.0 hours per month</td>
</tr>
</tbody>
</table>

**SICK**

*(not dependent on years of service)*

8.0 hours per month

---

9-month Academic Faculty **do not** accrue vacation hours
**Biweekly Accrual Rates**

*(Standard year of 2080 hours in People-soft)*

<table>
<thead>
<tr>
<th>VACATION</th>
<th>ACCRUAL RATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 5 years</td>
<td>120 (annual hours) divided by 2080 = (0.057692 \times 80 = 4.61 ) per period</td>
</tr>
<tr>
<td>5 – 10 years</td>
<td>144 (annual hours) divided by 2080 = (0.069231 \times 80 = 5.54 ) per period</td>
</tr>
<tr>
<td>10 years plus</td>
<td>168 (annual hours) divided by 2080 = (0.080769 \times 80 = 6.46 ) per period</td>
</tr>
<tr>
<td>SICK (not dependent on years of service)</td>
<td>96 (annual hours) divided by 2080 = (0.046154 \times 80 = 3.69 ) per period</td>
</tr>
</tbody>
</table>

**NOTE:** Bi-weekly Vacation and Sick Hours are reported on Timesheets only
Accrual Rates on HRMS Panels

Where to view leave balances

Click the arrow icon, or “View All” to view leave hours entered on panels.

**Note:**
New leave balances do not update until OHR-Payroll completes current month processing.
• Run the Leave Accrual Balance Report *after* OHR-Payroll completes processing and posting for the month.

• The Leave Accrual Balance Report includes time taken for the prior pay period and the accrual rate posted for the latest pay period. (Ex: December’s report includes the December accrual and time taken for November.)

• The report provides the following:
  • Last Date Processed which represents the period ending date for a specific payroll process run
  • The number of current hours accrued (current period ending)
  • Hours reported for time taken during the prior month (i.e., September’s report will reflect time taken in August)
  • Balances (hours carried over) from the prior month
  • Year-to-date hours earned, reported and adjusted

• This report must be used to reconcile each employee’s balances at the end of each pay period. It should also be used, in conjunction with the vacation calculator, to determine an accrued vacation balance for payout upon an employee’s termination, retirement, or other action to end a regular employee’s assignment at Georgia Tech.
Navigate: My HR > Reports > Leave Accrual Balance

Enter Run Control ID and the appropriate report parameters:

**Report Parameters**

- **Enter Dept ID:** 3 digit number
- **Pay Period End Date:** mm/dd/year
- For individual employee Enter Empl ID:
- **SetID:** GT
- **Company:** GT
### Leave Accrual Balance Report

**Employee Type: Salaried**

**Home Dept: 10110 Aerospace Engineering**

<table>
<thead>
<tr>
<th>Empl ID</th>
<th>Emp Name</th>
<th>Plan Type</th>
<th>Benefit Plan</th>
<th>Last Date Processed</th>
<th>Current Hours Accrued</th>
<th>Current Hours Reported</th>
<th>Hours Carried Over</th>
<th>YTD Hours Earned</th>
<th>YTD Hours Reported</th>
<th>YTD Hours Adjusted</th>
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<tr>
<td>2894</td>
<td>George Burdell</td>
<td>50</td>
<td>SICKM</td>
<td>12/31/00</td>
<td>8.00</td>
<td>0.00</td>
<td>1,286.80</td>
<td>96.00</td>
<td>16.00</td>
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</tr>
<tr>
<td>51</td>
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<td>VACM</td>
<td>12/31/00</td>
<td>14.00</td>
<td>24.00</td>
<td>360.00</td>
<td>168.00</td>
<td>2.00</td>
<td>340.00</td>
<td></td>
</tr>
</tbody>
</table>

**Hours reported by the Department Administer**

**Reported adjustments entered by Payroll**
Help, I cannot enter data!

Department Vacation/Sick Administrator can only enter leave hours within the first **10 business days** of each month.
Excess Hours Message

The Dept Vacation/Sick Administrator must email pay.ask@ohr.gatech.edu and request to use future payrolls for the excessive leave hours.
PeopleSoft could not find an employee record to match your selection criteria. Enter new selection criteria.
Access & Security Errors

You do not have access to a department.

You must complete the Vacation/Sick Tutorial found at www.trainsweb.gatech.edu and your supervisor must request your access by sending an email pay.ask@ohr.gatech.edu.
Invalid Data Errors

PeopleSoft performs an audit when the **SAVE** button is clicked. If PeopleSoft finds invalid values, the error field is highlighted in **red**

Click OK to accept the error message

Enter valid values and tab out of the field before clicking SAVE
You Cannot Update Your Own Leave Records

PeopleSoft does not allow individuals to update their own records

**Policy Statement:** “Each GA Tech Department should have at least two Vacation/Sick Administrators”
How to Request Access

After completing the Vacation/Tutorial at www.trainsweb.gatech.edu, your Supervisor must send an email request to pay.ask@ohr.gatech.edu.

Include the following information in the email request:

- Full Name
- Department ID#
- GT Account Name

Send all training inquiries to pay.ask@ohr.gatech.edu