

# State of Wisconsin

## Department of Administration

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# Catastrophic Leave Donation

## Job Aid

Version 5.1

### Version History

Version	Date	Editor	Description
1.0	3/29/16	Ashley Price	Initial Release
2.0	9/26/18	Stacie Happel	Update - Unpublished
3.0	11/25/20	Brenda Williams	Update
4.0	3/2021	Brenda Williams	Update
4.1	12/2021	Brenda Williams	Update
5.0	1/2023	Brenda Williams	Updates for Absence Redesign – New Catastrophic Leave Entitlement
5.1	6/2024	Brenda Williams	Update LOA requirement, 16 hours of combined accrued leave balance and the ability to select the Empl Rcd for recipient.

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*Role: Agency Absence Management Specialist*

## NOTES ON USING THIS GUIDE

- [ER 18.15 Catastrophic Leave](#)
- [WI Human Resources Handbook Chapter 660 Catastrophic Leave Program](#)
  - [Donor Authorization for Catastrophic Leave](#)
  - [Application for Catastrophic Leave](#)
- The first steps in the Catastrophic Leave process: the employee (recipient), that has been approved for a partial or full LOA, that needs the donations completes an *Application for Catastrophic Leave* and it is approved by the agency. The employees donating leave (donors) completes the *Donor Authorization for Catastrophic Leave* form. The approved donations are forwarded to the agency’s absence management specialist for processing in the STAR/HCM (system). Donations are processed first in/first out, we recommend the donations are tracked on a spreadsheet.
- Best practice is to enter the donation into the system at the time it is needed by the recipient, usually no more than 1 to 2 pay periods at a time. However, if you are sure the recipient will use a certain amount of leave, you can enter a larger amount ahead of time. Once the “donation process” is run in the system the donor’s specific leave balance will decrease and the recipient’s Catastrophic Leave balance will increase. If the donor uses the leave prior to the donation being processed in the system, the donation is nullified.
  - Remember if any portion of the leave donation processed in the system is not used by the recipient, you will have to return the unused leave to the donor using the “Adjust Leave Program Balances” process.
  - **At year end, if you have donations not processed yet in the system and you are certain the recipient will be using the leave within the first couple pay periods of the following year, you can process the donations in the final pay period of the current calendar year. This will allow the donations to be reported in the correct calendar year. If you are uncertain the leave will be used, you should wait and process the donations as needed.**
- Effective January 1, 2023, we created a new entitlement called Catastrophic Leave. There is no change to the donor. Their specific leave balance will be reduced for the donation. The leave donation will no longer be added to the vacation balance of the recipient, but instead, into the new Catastrophic Leave entitlement under WI\_CATREV\_BAL Catastrophic Receive Balance.
  - The recipient, donations show on the Results By Calendar Group screen under Element Name WI\_CATLV\_BAL.

- Once the “donations process” has run and the recipient’s Catastrophic Leave balance has increased, the leave takes can be entered through the Create and Maintain screen for the recipient.
- The recipient can make the entry through Employee Self Service or the supervisor through Manager Self Service.
- The Catastrophic Leave balance will work just like Sick Leave. Balances at yearend will automatically carry forward into the new calendar year.

Central Payroll Results by Calendar Group

Calendar Group Results | **Accumulators** | Supporting Elements

Employee [Redacted] Empl ID [Redacted] Empl Record 0  
 Calendar Group ID 2022B21 September 25 to October 8

Calendar Information

Calendar ID 505 2022B21 Pay Group 505  
 Segment Number 1 Version 1 Revision 1  
 Gross Result Value 0.00 USD Net Result Value 0.00 USD

Accumulators

Accumulator Results | User Keys

Period^	Element Name^	Amount	Description^	From	Through
Year to Date	WI_CATLV_ADJ	12.000000	Catastrophic Leave Adjustments	01/01/2022	12/31/2022
Year to Date	WI_CATLV_BAL	4.000000	Catastrophic Leave Balance	01/01/2022	12/31/2022
Year to Date	WI_CATLV_TAKE	8.000000	Catastrophic Leave Take	01/01/2022	12/31/2022
Year to Date	WI_CATREC_ADJ	12.000000	Catastrophic Receive Adjustment	01/01/2022	12/31/2022
Year to Date	WI_CATREC_BAL	12.000000	Catastrophic Receive Balance	01/01/2022	12/31/2022
Segment	WI_CATLV_TKPP	8.000000	Catastrophic Use Period	09/25/2022	10/08/2022

- Donations made by a donor is shown in the Leave Program of the actual leave type being donated.

Central Payroll Results by Calendar Group

Calendar Group Results | **Accumulators** | Supporting Elements

Employee [Redacted] Empl ID [Redacted] Empl Record 0  
 Calendar Group ID 2022B07 March 13 to March 26

Calendar Information

Calendar ID 505 2022B07 Pay Group 505  
 Segment Number 1 Version 1 Revision 1  
 Gross Result Value 0.00 USD Net Result Value 0.00 USD

Accumulators

Accumulator Results | User Keys

Period^	Element Name^	Amount	Description^	From	Through
Year to Date	WI_CATLV_BAL	0.000000	Catastrophic Leave Balance	01/01/2022	12/31/2022
Year to Date	WI_CATREC_BAL	0.000000	Catastrophic Receive Balance	01/01/2022	12/31/2022
Year to Date	WI_DON_LEGAL_BAL	0.000000	Donation Leave Legal HOL	01/01/2022	12/31/2022
Year to Date	WI_DON_PERHO_BAL	0.000000	Donation Leave Personal HOL	01/01/2022	12/31/2022
Year to Date	WI_DON_SABB_BAL	0.000000	Donation Leave Sabbatical	01/01/2022	12/31/2022
Year to Date	WI_DON_VAC_BAL	0.000000	Donation Leave Vacation	01/01/2022	12/31/2022

- Leave Donation process runs 4 times during payroll processing week approximately: 7 am, 11:30 AM, and 10 pm Monday; and 11:30 am Tuesday.

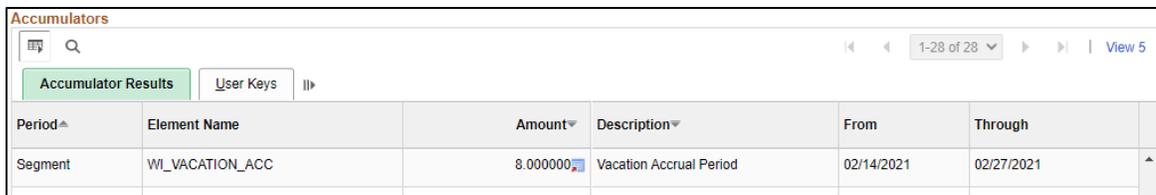
## ENTERING LEAVE DONATIONS

The Catastrophic Leave program enables employees (donors) to transfer leave from their accrued leave hours to other employees (recipients) who have exhausted their own leave due to a qualifying emergency in accordance with ER18.15 (Catastrophic Leave).

**System security is setup so that it does not limit access to the recipients by the agencies but does limit access to the donor by agency.** This means the donating agency must make the entry. The best practice is to have the donating agency makes the entries for both the donor and the recipient. The recipient's agency needs to provide the Employee Name, Empl Id, ER and maximum number hours that still can be donated for the year within the 640 hours. The recipient's agency should only be requesting the donation at the time they are ready to use the donation. Agencies will need to work together to share the necessary information.

**A recipient may not use more than 80 hours of leave or the number of hours consistent with their regularly scheduled hours per pay period.** Each pay period, including the beginning of a new calendar year, leave credits earned/accrued by recipient shall be used prior to using the donated leave credits.

**For the recipient to be eligible, the employee must use all available sick leave credits. The employee may have a leave balance of no more than 16 hours of combined "accrued" vacation, sabbatical/termination leave, personal holiday, and legal holiday.** *This does not mean the employee must use all "awarded" vacation and legal holiday but they must use all earned/accrued vacation and legal holiday.* Since the employee will accrual additional sick and vacation each pay period in pay status, when the employee is using Catastrophic leave you must use any new earned sick , vacation or legal holiday in that pay period so that the combined accrued leave does not exceed 16 hours.



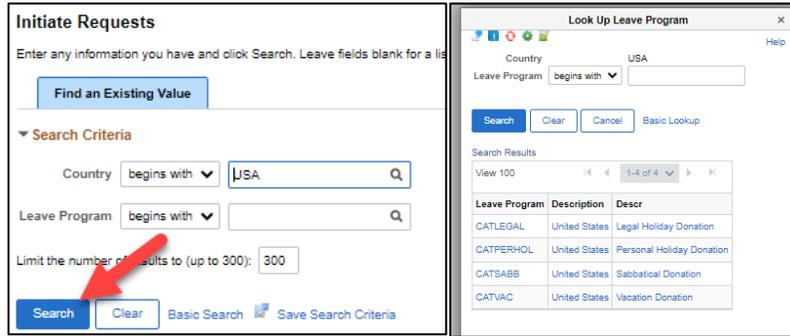
Period <sup>▲</sup>	Element Name	Amount <sup>▼</sup>	Description <sup>▼</sup>	From	Through
Segment	WL_VACATION_ACC	8.000000	Vacation Accrual Period	02/14/2021	02/27/2021

**A recipient is eligible to be paid for any legal holiday (LH) which falls during a pay period in which donated leave is used** for either the last scheduled workday immediately preceding or the first scheduled workday immediately following the holiday. Determine if a proration of the LH is needed if their work and/or paid leave hours in the pay period the holiday occurs is less than their FTE, and their work and/or paid leave hours total less than their FTE in the prior 2-week pay period.

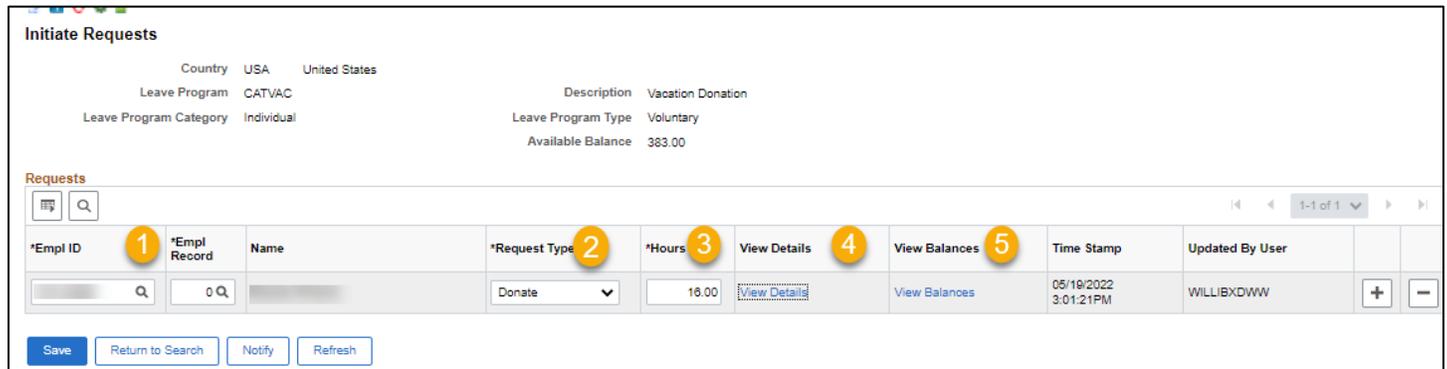
## Navigate to the Initiate Requests screen



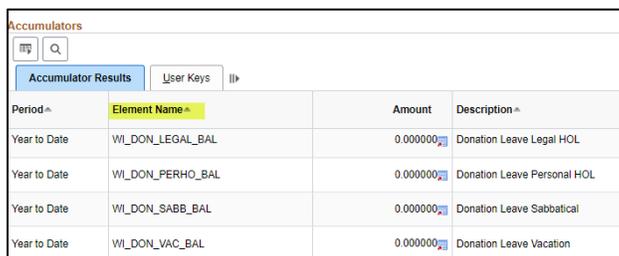
- From the Search Results list, Country field must be USA.
- Click **Search**
- Select the *Leave Program* that matches the type of leave being donated.



The [Initiate Requests screen](#) will appear.



1. In the **Empl ID** and **EMPL Rcd** fields enter the data of the donor.
2. In the **Request Type** field select *Donate* from list.
3. In the **Hours** field, enter the number of whole hours being donated.
  - a. **Be Caution:** The maximum leave an employee can donate in a calendar year is 24 hours. The system will allow you to enter more than 24 hours on the Initiate Request screen. The audit is built into this system at time of the “leave donation process” being run. If you enter more than 24 hours of donation from an employee in a calendar year it will cause a fatal error during absence processing. Step 5 View Balances does not work . Instead go to the Donor’s Results by Calendar Group screen to see if the employee already donated this year. (To Group together simply click on the Element Name header. )



4. Click **View Details** which will take you to the Request to Donate Leave screen.

The [Request to Donate Leave screen](#) will appear. Under the Leave Contribution section enter the following:

1. In the **From Entitlement** field select the *leave type*. This should match the type of leave being donated.
2. In the **Hours to Donate** field verify the hours displayed populated correctly from the previous screen. If hours were not entered on the previous screen, they can be entered in this field.
3. In the **Recipient Type** field select *Employee* from the list.
4. In the **Name** field, type in the recipient’s last name, first initial of first name; click on the Look Up icon in the Name field.
  - a. All active state employees are included in the list.
5. Select the employee who is the recipient of the donation, by clicking on the person’s name from the drop down list. The system will default to the employee’s lowest active Empl Rcd that is leave eligible.
6. Click OK.

**Donation Program**

\*Program Name: Vacation Donation

Category: Individual      Type: Voluntary

Contribution Type: One-Time

Unit Type: Hours      Ceiling Limit: 640.00

Minimum Hours: 1.00      Maximum Hours: 640.00

Begin Date: 01/01/2022      End Date:

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**Leave Contribution**

From Entitlement	Balance	Hours to Donate	Recipient Type	Recipient Emplid	Recipient Employee Record	Name	Details
Vacation	211.85	16.00	Employee		0	Pertl, J	Details

**Look Up Recipient Emplid**

Name (LN, FN) begins with: Pertl, J

Buttons: Search, Clear, Cancel, Basic Lookup

Search Results

View 100 | 1-1 of 1

Empl ID	Name (LN, FN)
	Pertl, John Jeffrey

**Comments**

Approver Comments: [Text Area]

Buttons: OK, Cancel

You will be taken back to the Initiate Requests screen:

- ✓ To enter additional donations from other employees for the same leave type, click **Add a Row (+)** and repeat the entry steps.
- ✓ To enter additional donations for a different leave type, click **Save**, then click **Return to Search** and you will be taken to the Initiate Requests screen. Go back to the Initiate Requests screen instructions above, and select a new Leave Program, and repeat the entry steps.
- ✓ After all leave donations have been entered, click **Save**. The leave balances will not update until the “leave donation process” is run by DOA Central Payroll.

➤ **RESULTS:** The “leave donation process” is run before each absence calculation during processing week. Once this process has been run to success, the Catastrophic Leave is available to use on the recipient’s timesheet for the pay period being processed.

Approximate run times: 7 am, 11:30 AM and 10 pm Monday; and 11:30 am Tuesday.

**Employee with multiple active “leave eligible” Employee Records**

Since the leave entitlements are in one bucket, regardless of the number of active “leave eligible” Empl Records, simply make one entry on the “Initiate Request” screen under the lowest active eligible Empl Record. There is no need to split the requests between the Empl Records.

## **WHEN RECIPIENT IS ACTIVE IN AN EMP RCD OTHER THAN 0**

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There was a known system issue in the Catastrophic Leave Donation process. The system was only applying the Catastrophic leave donation to the recipient under Empl Record 0. If the recipient was not active under ERO and only active under another Empl Record, on the Results by Calendar Group screen the donation was shown for the donor, but the Catastrophic leave was not shown for the recipient.

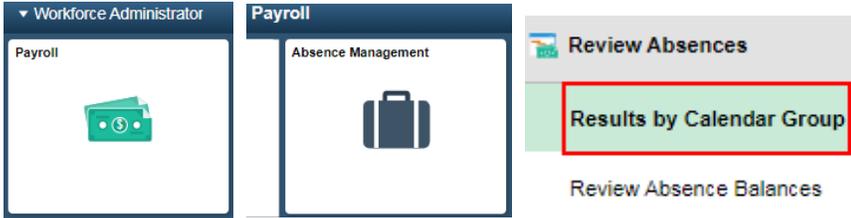
This has been fixed as of May 26, 2024. See instructions in the Entering Leave Donations section.

# REVIEWING LEAVE DONATIONS

## Option 1: Review by Donor or Recipient Balance on the Results by Calendar Group screen

- ✓ To confirm the donations for both the donor(s) and the recipient, you can review the Results by Calendar Group screen for the pay period that is currently being processed. The leave balances will not update until the “Leave Donation process” and “Absence Calc process” is run by DOA Central Payroll.

➤ Navigate to the **Results by Calendar Group** screen



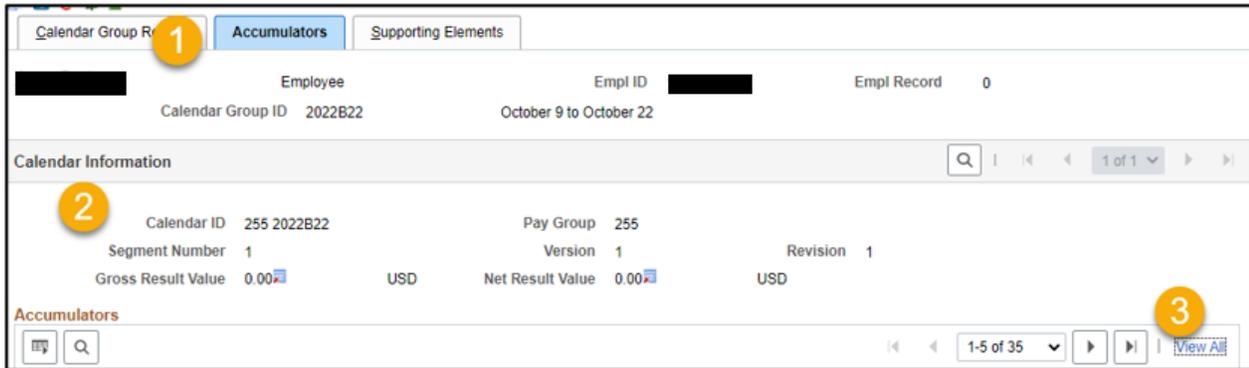
- Enter the **Empl ID** for the donor or recipient you want to review.
  - Click **Search**
  - From the Search Results list, select the *Calendar Group ID* that has most recently been processed.

The screenshot shows the 'Results by Calendar Group' search interface. It includes a search criteria section with dropdown menus for 'Empl ID begins with', 'Empl Record =', 'Calendar Group ID begins with', and 'Name begins with'. There is a 'Search' button highlighted with a red box. Below the search criteria, there is a table of search results.

Empl ID	Empl Record	Calendar Group ID	Name
[REDACTED]	0	2022B22	Jenna Buchner

Review adjustments and balances

1. Click the **Accumulators** tab
2. Verify that you are reviewing the Calendar ID in which the donations were submitted.
3. Click the **View All** link to see all Accumulators processed for the period. Click on the Header *Description*, to sort by leave types.



- ✓ If reviewing a DONOR:
  - A total leave balance displays with Element Name WI TOTAL DONATION

Year to Date	WI TOTAL DONATION	12.000000	DONOR AMOUNT
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- A leave balance (WI\_DON\_xxx\_BAL) and leave adjustment (WI\_DOC\_xxx\_ADJ) display for the specific type(s) of donated leave.

Year to Date	WI_DON_LEGAL_BAL	0.000000	Donation Leave Legal HOL
Year to Date	WI_DON_PERHO_BAL	0.000000	Donation Leave Personal HOL
Year to Date	WI_DON_SABB_ADJ	8.000000	Donation Leave Sabbatical
Year to Date	WI_DON_SABB_BAL	8.000000	Donation Leave Sabbatical
Year to Date	WI_DON_VAC_ADJ	4.000000	Donation Leave Vacation
Year to Date	WI_DON_VAC_BAL	4.000000	Donation Leave Vacation

- Leave donations are not listed as a TAKE/Used (WI\_PER\_HOL\_TAKE) but the balance does reduce.

Year to Date	WI_PER_HOL_BAL	0.000000	Personal Holiday Balance
Year to Date	WI_PER_HOL_ENT	36.000000	Personal Holiday Award
Year to Date	WI_PER_HOL_TAKE	32.000000	Personal Holiday Used

- ✓ If reviewing a RECIPIENT:
  - The Catastrophic leave balances display with these Element Names as seen below:

Accumulators			
Period^	Element Name^	Amount	Description^
Year to Date	WI_CATLV_ADJ	12.000000	Catastrophic Leave Adjustments
Year to Date	WI_CATLV_BAL	4.000000	Catastrophic Leave Balance
Year to Date	WI_CATLV_TAKE	8.000000	Catastrophic Leave Take
Segment	WI_CATLV_TKPP	8.000000	Catastrophic Use Period
Year to Date	WI_CATREC_ADJ	12.000000	Catastrophic Receive Adjustmnt
Year to Date	WI_CATREC_BAL	12.000000	Catastrophic Receive Balance

- WI\_CATLV\_ADJ shows the Initiate Request hours and any “manual absence adjustments” for Catastrophic leave year to date.
- WI\_CATLV\_BAL shows the balance of Catastrophic leave available.
- WI\_CATLV\_TAKE shows Catastrophic leave used year to date.
- WI\_CATLV\_TKPP shows Catastrophic leave used this pay period.
- WI\_CATREC\_ADJ shows the Initiate Request hours for Catastrophic leave received year to date. This will only show adjustments done through the Adjust Leave Program Balances screen where you are changing the receive balance. It does not pick up “manual absence adjustments” to Catastrophic leave balance.
- WI\_CATREC\_BAL shows total Catastrophic leave received year to date.
- In the example above, the employee received 12 hours of donation through the Initiate Request screen and used 8 hours Catastrophic leave for a balance of 4.
- You may also use the WI\_ABS\_MANUAL\_ADJUSTMENTS query to see the donations made to a specific employee. The 12 hours WI\_CATREC\_BAL was 2 different donations. 4 hours Vacation and 8 hours Sabbatical for a total of 12 hours WI\_CATREC.

Pay Group	Calendar ID	Empl ID	ER	Name	Begin Date	End Date	Absence Type	Bal adj	Created by	Last Update	Comment
505	505 2022B21		0		9/25/2022	10/8/2022	WI_CATREC	4.000000	WILLIBXDWW	12/5/2022 10:59	
505	505 2022B21		0		9/25/2022	10/8/2022	WI_CATREC	8.000000	WILLIBXDWW	12/5/2022 10:59	

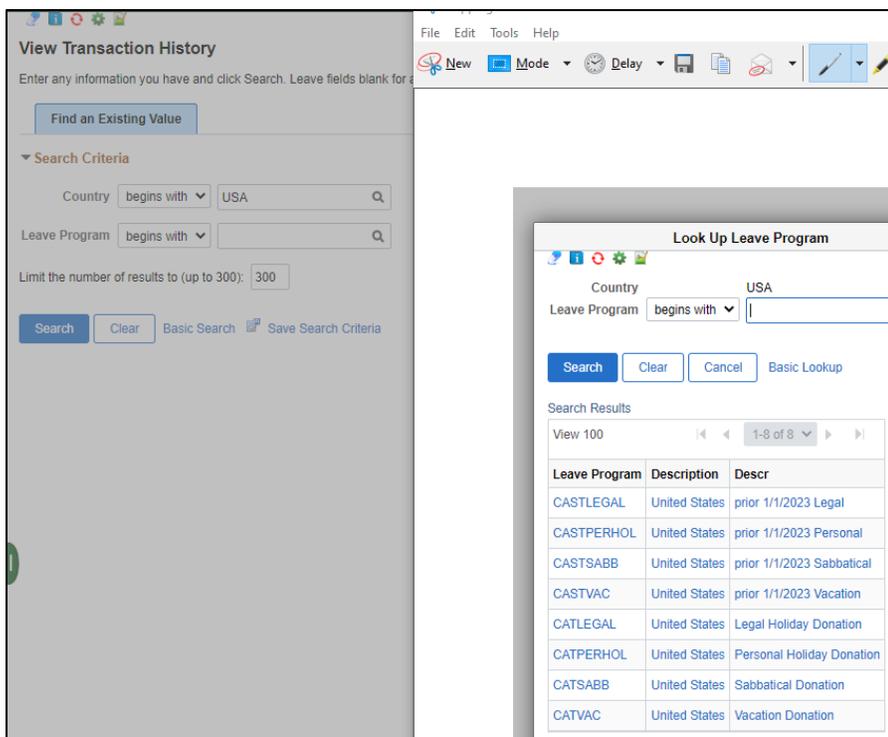
## Option 2: Review by Donation Transaction screen

To review all donations from the donor(s) or any leave donation adjustments, you can review the Transaction History for each Leave Program. You can see who the recipient of the donation is by clicking on the PI Entries field, under the Generated PI Entries screen.

- **Step 1:** Navigate to the **View Transaction History** screen



- Enter "USA: in Country field.
- From the Search Results list, select the *Leave Program* that matches the type of leave being reviewed
  - CAST... are donations prior to 1/1/2023
  - CAT...are donations from 1/1/2023 forward
- Click **Search**



**Step 2:** Review the Leave Program donations

- Submitted donations for that Leave Program will display.
- Selection Criteria can be used to narrow results if you are looking for a particular donor or donations/adjustments for a particular period. If looking for a specific donor be sure to enter the Empl ID in both the From and To fields.

### View Transaction History

Country USA United States  
 Leave Program CATSABB Description Sabbatical Donation  
 Program Category Individual Program Type Voluntary  
 Contribution Type One-Time Program Balance 8.000000 Unit Type Hours

**Selection Criteria**

From Date  To Date   
 Request Type  Transaction Status   
 Empl ID From  Empl ID To

### Leave Transfer Transaction Information

Request Details | Transfer Details

Empl ID	Job	Name	Request Type	Hours	Date Submitted	Recipient Emplid	Workflow Status
[REDACTED]	0	[REDACTED]	Donate	8.00	12/05/2022	100123860	Approved

**Step 3:** Expand to See Donor Empl ID and Transactions Status.

Click on the PI Entries field to bring up the Generated PI Entries screen, which provides the recipient's Empl Id.

### Leave Transfer Transaction Information

1-1 of 1

Empl ID	Job	Name	Request Type	Hours	Date Submitted	Recipient Emplid	Workflow Status	Termination Date	PI Entries	Transaction Status	Process Date
[REDACTED]	0	[REDACTED]	Donate	8.00	12/05/2022	100123860	Approved		<a href="#">PI Entries</a>	Processed	12/05/2022

### Positive Input Details

#### Generated PI Entries

1-2 of 2 | View All

Entitlement Details | Calendar Details

	Empl ID	Empl Record	Element Name	Description	Balance Adjustment
1	[REDACTED]	Recipient	0 WI_CATREC	Catastrophic Donation Receive	8.000000
2	[REDACTED]	Donor	0 WI_DON_SABB	Donation Leave Sabbatical	8.000000

# ADJUSTING LEAVE DONATIONS

Adjustments can be made to leave donations that have already been submitted.

## Step 1: Navigate to the Adjust Leave Program Balances screen



- USA populates into the **Country** field
  - In the **Leave Program** field, from the Search Results list, select the *Leave Program* that matches the type of leave being adjusted.
- Note: Adjustments cannot be made prior to 1/1/2023.**

The 'Look Up Leave Program' search interface shows the following fields and options:

- Country: USA
- Leave Program: begins with
- Buttons: Search, Clear, Cancel, Basic Lookup
- Search Results: View 100, 1-4 of 4
- Table:

Leave Program	Description	Descr
CATLEGAL	United States	Legal Holiday Donation
CATPERHOL	United States	Personal Holiday Donation
CATSABB	United States	Sabbatical Donation
CATVAC	United States	Vacation Donation

- Click **Add** once the Leave Program is selected.

The 'Adjust Leave Program Balances' form shows the following fields and options:

- Buttons: Add a New Value
- \*Country: USA
- \*Leave Program: CATSABB
- Buttons: Add

## Step 2: Adjust Leave Program Balances screen

- At the top of the screen in the **Adjustment Date field** enter the first day of the current pay period.
- DO NOT ENTER IN THE ADJUST BANK BALANCE SECTION.

IN THE ADJUST INDIVIDUAL BALANCES SECTION:

- In the **Empl ID field** enter data of the person being adjusted
- In the **Empl Rec field**, if not zero
- In the **Target Entitlement field**
  - When adjusting the donor's original donation, select *Donation Leave (Leave Program)*.
    - If Donation Leave is anything other than vacation, you will have to navigate back to the **Adjust Leave Program Balances** screen and enter a new Leave Program for Vacation before adjusting the recipient's.
  - When adjusting the recipient's original amount, select *Catastrophic Donation Receive*.

NOTE: An entry is required for both the donor *and* the recipient. In rare instances, if you entered only the donation for the donor and never entered the recipient, you can reduce only the donor at this time.

- In the **Adjustment Hours field** enter the negative whole number of hours you want to decrease by. (This should usually be a negative amount for both participants. In rare instances if a negative donation balance is showing, you would enter a positive amount to clear it.)
- Enter a **Reason** (optional)
  - Examples:
    - Recipient no longer in need of donations. Original entry keyed in error. Donation given to wrong recipient.
- Click **Save**

**Adjust Leave Program Balances**

Country USA United States  
Leave Program CATSABB  
Available Balance 8.00

Description Sabbatical Donation  
\*Adjustment Date 10/09/2022

**Adjust Bank Balance**

Adjustment Hours  
Reason **Do not enter in this section.**

**Adjust Individual Balances**

Employee ID [REDACTED] Record 0  
Target Entitlement Donation Leave Sabbatical Adjustment Hours -1.00 Donor  
Reason Recipient no longer in need of donations.

Employee ID [REDACTED] Record 0  
Target Entitlement Catastrophic Donation Receive Adjustment Hours -1.00 Recipient  
Reason Recipient no longer in need of donations.

Updated on 01/23/2023 1:16:27PM Updated By WILLIBXDWW

Save Add

Donor RCG screen WI\_DON\_SABB and WI TOTAL DONATION reduced by 1 hour:

Year to Date	WI_DON_VAC_ADJ	4.000000	Donation Leave Vacation
Year to Date	WI_DON_VAC_BAL	4.000000	Donation Leave Vacation
Year to Date	WI_DON_SABB_ADJ	7.000000	Donation Leave Sabbatical
Year to Date	WI_DON_SABB_BAL	7.000000	Donation Leave Sabbatical
Year to Date	WI_DON_PERHO_BAL	0.000000	Donation Leave Personal HOL
Year to Date	WI_DON_LEGAL_BAL	0.000000	Donation Leave Legal HOL
Year to Date	WI TOTAL DONATION	11.000000	DONOR AMOUNT

Recipient RCG screen WI\_CATREV reduced by 1 hour:

Year to Date	WI_CATREC_BAL	11.000000	Catastrophic Receive Balance
Year to Date	WI_CATREC_ADJ	11.000000	Catastrophic Receive Adjustmnt
Year to Date	WI_CATLV_TAKE	8.000000	Catastrophic Leave Take
Year to Date	WI_CATLV_BAL	3.000000	Catastrophic Leave Balance
Year to Date	WI_CATLV_ADJ	11.000000	Catastrophic Leave Adjustments

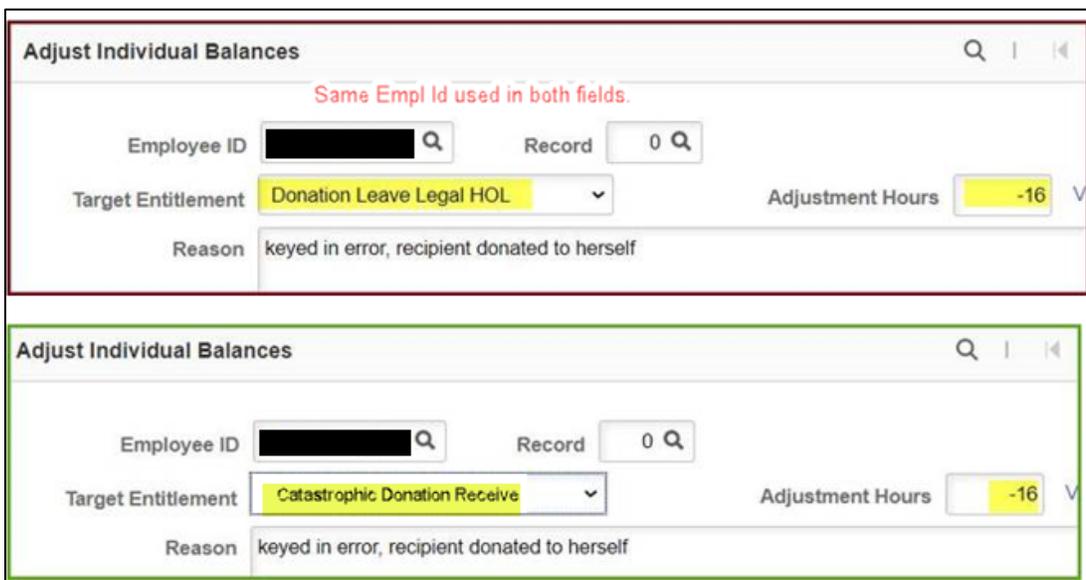
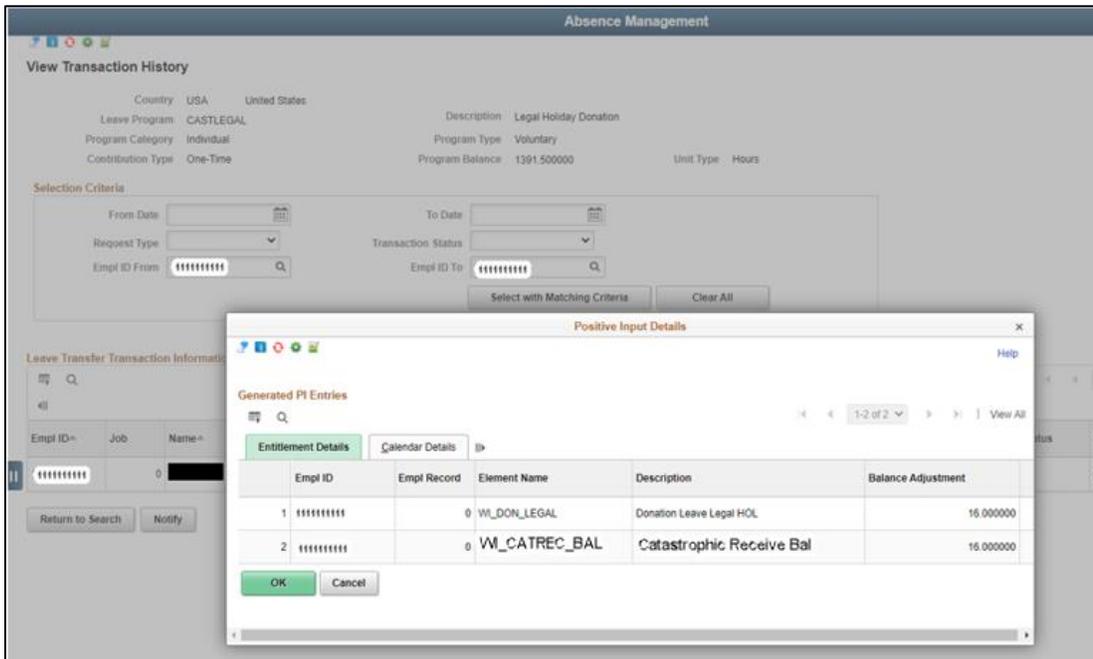
**RESULTS:** After the Absence Calculation runs, the donor and recipient balances are adjusted.

- ✓ To enter additional adjustments for the same leave program, click **Add a Row (+)** button and repeat the previous steps. When done click the Save button.
- ✓ To enter additional adjustments for a different leave program, navigate back to the **Adjust Leave Program Balances** screen and enter a new Leave Program and complete the previous steps.

**Example of keying error**

The Empl Id of the recipient was used for both the donor and the recipient. The process took 16.0 hours of Legal Holiday from the employee and gave 16.0 hours of Catastrophic Leave to the same employee.

On the Results by Calendar Group screen the WI\_DON\_LEGAL\_BAL and WI\_CATREC\_BAL increased for the 16.0 hours. Once the correcting “Adjustment Leave Program Balances” processes, the balances will be back to 0.0 hours. At that point you can key in the correct Initiate Request.



The reason you want to correct both the donor and the recipient is, so they connect to each other under the Review by Donation Transaction screen; on the Generated PI Entries screen.

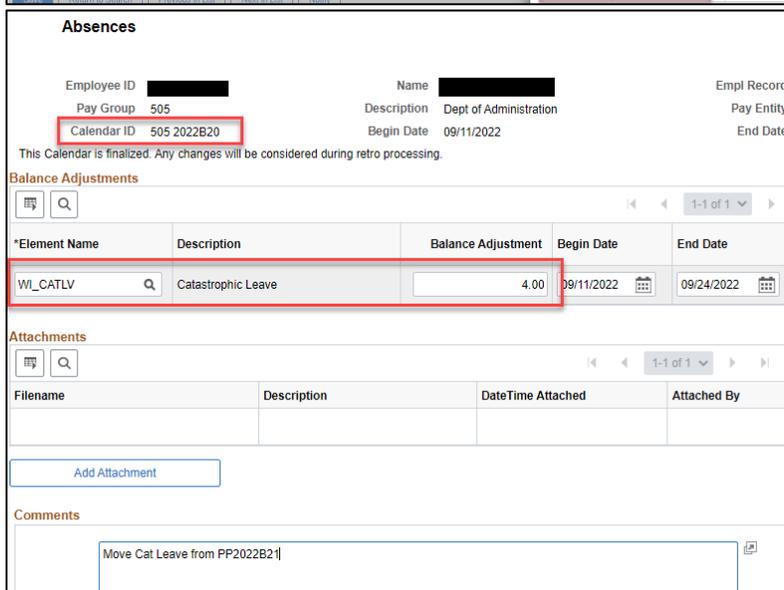
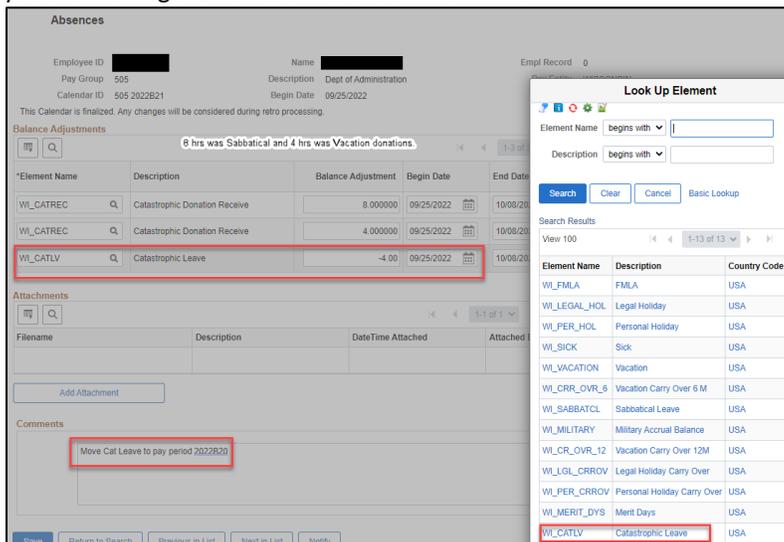
# APPLYING DONATIONS TO A PRIOR PAY PERIOD

When donations are entered into the system after the fact, you must manually adjust the Catastrophic Leave hours for the recipient to use the leave in a past pay period. Enter through the Absence Adjustment screen the amount of Catastrophic Leave needed in the pay period you will be using the hours on the timesheet. Then deduct the leave hours in the pay period the donations were originally made in. No adjustments are needed for the donor. After the next absence calculation has run, the Catastrophic Leave will be available to use.

**Note: As of 1/1/2023 we no longer have to push the absence adjustment back to the pay period prior to when the Catastrophic Leave hours are needed.**



Open the original Absence Adjustment the Donation was processed in. In this example the Donation was processed in 2021B21 and you are moving the donation back to PP2022B20.



## DONATING VACATION CARRYOVER

Per the Division of Personnel Management, the meaning of the following sentence of the [Admin Code at ER 18.15\(4\)\(a\)2.](#): “The total amount of leave credits donated by a donor to all recipients in any calendar year may not exceed 24 hours,”. They clarified that the limit is 24 hours donated during the period from Jan 1 through Dec 31, regardless of the year in which the leave was accrued, or the year in which the donated leave is used by the recipient. In other words, the 24 hour donation limit is based on the calendar year the donor submitted the donation form.

Two possible scenarios:

1. The employee submits the Donor Authorization form in 2020. The leave is not needed by the recipient until 2021 and the donation was not processed through the “leave donation” process prior to the end of the calendar year but instead will be processed in 2021. Regardless of when the recipient uses the donated leave, the donation would count towards the **donor’s 2020 24-hour limit**. The leave being donated is carried forward into 2021 and is in the donor’s carryover bucket.
  - a. The agency will need to verify the donor is within their 24-hour maximum donation limit for 2020.
  - b. You will NOT use the “leave donation” process since that would apply the donation incorrectly to the donor’s 2021 24-hour maximum donation limit.
  - c. The donated hours will apply to the **recipient’s 2021 640-hour limit** of donated leave credits.
  - d. Since we are not running the donation through the “leave donation” process, the hours are not included in the balances described in the Reviewing Leave Donations section above. The agency will have to manually track these donations.
    - i. For the donor - the agency will enter a manual absence adjustment for PP2021B01A reducing the donor’s 2020 carryover bucket. In the description indicate, “Previous year catastrophic leave donation to Recipient Name and Empl Id”.
    - ii. For recipient - the agency will enter a second manual absence adjustment for the 2021 pay period the donation is being made increasing the recipient’s Catastrophic balance (new leave type replacing vacation as of 1/1/2023) In the description indicate, “Previous year catastrophic leave donation from Donor Name and Empl Id”.
2. The employee submits the Donor Authorization form in 2021 requesting to use their 2020 carryover. The donation would count towards the **donor’s 2021 24-hour limit** and the **recipient’s 2021 640-hour limit**.
  - a. You will use the “leave donation” process since we want the donation to apply to the donor’s 2021 donation limit. Follow the instructions in the Entering Leave Donations section above.
  - b. Once the leave donation process has run, a manual adjustment will automatically be created with the Donation Leave Vacation entry to take from 2021 current year vacation balance. To make the leave come from carryover balance, you will need to make the additional 2 line entries to the existing manual absence adjustment as shown below.

The leave donation process only converts current year vacation to the recipient. To take the donation from their vacation carryover you must manually add the donation back into the current year vacation bucket and deduct it from the carryover bucket in the same pay period that you key the donation.

Example: The manual absence adjustment for PP2021B04 was created after the first Leave Donation run on Monday of processing week creating the Donation Leave Vacation line. To add the additional 2 lines to the absence adjustment, you open the existing adjustment and enter the 2 rows to reduce the carryover leave and increase the current year **Vacation balance**.



ABS Admin Absences

### Absences

Employee ID [redacted] Name [redacted] Empl Record 0  
 Pay Group 505 Description Dept of Administration Pay Entity WISCONSIN  
 Calendar ID 505 2021B04 Begin Date 01/31/2021 End Date 02/13/2021

This Calendar is finalized. Any changes will be considered during retro processing.

#### Balance Adjustments

*Element Name	Description	Balance Adjustment	Begin Date	End Date
WI_VACATION	Vacation	24 000000	01/31/2021	02/13/2021
WI_CRR_OVR_6	Vacation Carry Over 6 M	-24 000000	01/31/2021	02/13/2021
WI_CATLV_1	Catastrophic Leave 1	24 000000	01/31/2021	02/13/2021

#### Attachments

Filename	Description	Date Time Attached	Attached By

Add Attachment

#### Comments

24 hours of donated CAT leave for [redacted] to be taken from 2020 vacation carryover

## YEAR END DONATIONS

Best practice is to only process the donations in the calendar year that are needed in that calendar year, allowing enough for the year end split pay period. But, if you are certain the recipient will be using the leave within the first couple pay periods of the following year, you can process the donations in the final pay period of the calendar year prior to the split pay period. This will allow the donations to be reported in the correct calendar year. If you are uncertain the leave will be used, you should wait and process the donations as needed.

If there are leave donations that are not needed by your recipients at year end, hold those donor forms. Best practice – send an email to the donors letting them know you did not use their current year donations and are holding the donations to be used in the next year and the donation hours will be part of their carryover. If the donation is no longer needed, you should void the Donor Authorization form and let the donor know. Since the donations should not be processed until needed, no adjustment should be required. If the donation was processed in the system, and it is not needed, follow the instructions in the Adjusting Leave Donations section above.

If the donated amount not being used at year end puts the employee over the 40 hours vacation carryover (or using PH or LH) you will need to include the donor employee on the Individual Agency Exception request with the Justification – Catastrophic Leave Donor 202# Balance. If you were not aware of these employees at the time you submit your initial Individual Carryover Exception request, send a separate Exception request with the donors listed.

Note: If the donation involving carryover leave has not been processed by the next fiscal year end, an exception should be submitted to DOA CP.

Leave credits donated to a recipient are not subject to limitations on end of year carryover of leave credits. Leave credits donated more than the maximum number of leave credits required for a recipient shall be returned to the donor. Donors shall have the remainder of the calendar year and the first 6 months of the ensuing calendar year in which to use previously donated leave credits returned to the donor during the last 6 months of the calendar year.

From WI Human Resources Handbook Chapter 660:

8. Leave credits donated to recipients are not subject to limitations on end-of-year carryover of leave credits under ss. ER 18.02(6)(b) and ER 18.04(4)(c), Wis. Adm. Code.

**EXAMPLE:** A recipient is on approved unpaid leave and is using donated leave. Donated leave credits remaining at the end of the calendar year will automatically carry over into the ensuing calendar year and will be used until donations are exhausted or the catastrophic need is resolved and any unused donated credits are returned to the donor.

9. Donated leave credits will not be reflected on the recipient's official leave accounting balance until the pay period in which the credits are actually used by the recipient.

## NO LEAVE DONATIONS PROCESSED IN A SPLIT PAY PERIOD

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There can be up to 2 split pay periods each calendar year. One at the end of the year, splitting the calendar years and one in June splitting the fiscal years. These 2 pay periods have 2 absence calendar IDs in the system, distinguished with an A.

Examples:

The split pay periods for 2021:

2021B01 = 12/20/2020 to 12/31/2020

2021B01A = 1/1/2021 to 1/2/2021

2021B14 = 6/20/2021 to 6/30/2021

2021B14A = 7/1/2021 to 7/3/2021

Because these pay periods are split into two calendar ID within each calendar group ID, the leave donation process does not work. Therefore, we DO NOT run the Leave Donation process in these two pay periods. If donations are keyed in a split pay period, they will remain unprocessed until the following pay period.

You may process your leave donations in the system the pay period prior to the split if there are sufficient leave donations. Otherwise, the donations will process in the pay period following the split and an absence adjustment will be required to move the donations (Catastrophic Leave balance) to the split pay period. If the donation is not processed so the leave is available to the employee in the split pay period, you may either:

- Not pay the employee in the split pay period and do a retro payment in the following pay period; or
- Use the LVSWP Time Reporting Code on the timesheet in the split pay period to get the employee paid.
  - In the following pay period after the leave donation has run and the Catastrophic Leave balance is now available, process an absence adjustment to move the leave balance back to the split pay period.
  - Remove the LVSWP from the split pay period timesheet, submit and approve.
  - Enter the Catastrophic Leave take on the Create and Maintain screen, Forecast & Submit.