State of Wisconsin
Department of Administration

Catastrophic Leave Donation
Job Aid

Version 4.1

Version History

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NOTES ON USING THIS GUIDE

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 are the employee in need of the donations (recipient) completes an Application for Catastrophic Leave, and the employees donating leave (donors) completes the Donor Authorization for Catastrophic Leave form. Once these are approved, they are forwarded to the agency’s absence management specialist for processing in the STAR/HCM (system).
- 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 up to that 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 vacation 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 do the adjustments to return the unused leave to the donor.
  - At year end, if you have donations not processed yet 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.
  - Donations always show as vacation in the recipient’s balance.
Once the “donations process” has run and the recipient's vacation balance has increased, the vacation takes can be made on the recipient’s timesheet.

- Donations made by a donor is shown in the Leave Program of the actual leave type being donated.
- 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. This means either agency can make the entry for the recipient, but only the agency the donor works for is able to make the entry for the donor. Best practice is to have the donating agency make the entries for both the donor and the recipient. Otherwise, the donating agency can do the entry for their employee and provide the information to the recipient’s agency to do the recipient entry.

IMPORTANT: 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.

The recipient must use all available sick leave and have a leave balance of no more than 16 hours of combined “accrued” vacation, including sabbatical/termination leave, and personal/legal holiday credits. This does not mean the employee must use all awarded vacation but use all earned/accrued vacation.

A recipient is eligible to be paid for any legal holiday 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.

Note: We do not run the Leave Donation process in the 2 split pay periods, which occur mid-year June and end of year December. You may process your 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 to the split pay period. This means the recipient will not be able to be paid in the split pay period but paid retroactively in the following pay period.
Navigate to the Initiate Requests screen

Click Search
- From the Search Results list, select the Leave Program that matches the type of leave being donated

The Initiate Requests screen will appear.

1. In the Request Date field enter the first day of the current pay period.
2. In the Empl ID and EMPL Rcd fields enter the data of the donor.
3. In the Request Type field select Donate from list.
4. In the Hours field, enter the number of whole hours being donated.
   a. **Be Cautious**: 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 in 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.

Go to the Donor’s Results by Calendar Group screen to see if the employee already donated this year.

5. Click View Details
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, select the **Recipient** from the list of employees.
   a. All State employees are included in the list. Type in the recipient’s last name, first initial of first name; click on the Look Up icon in the Name field. Select the employee who is the recipient of the donation.
   b. There is no security for the recipient, so if the donor is from a different agency the donating agency will have no issue selecting the recipient.
5. Click **OK**

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 vacation 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.
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” 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.
➢ 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.

odoreviewing a DONOR:
   - A total leave balance displays with Element Name **WI TOTAL DONATION**

   ![Screenshot](image1.png)

   - A leave balance (**WI_DON_xxx_BAL**) and leave adjustment (**WI_DOC_xxx_ADJ**) display for the specific type(s) of donated leave

   ![Screenshot](image2.png)

   - Leave donations are not listed as a take (USED) but the balance does reduce
✓ If reviewing a RECIPIENT:
  o A leave balance displays with Element Name WI RECIPIENT, WI_REC_VAC_ADJ and WI_REC_VAC_BAL

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  o WI_VACATION_BAL (Vacation Balance) displays an increase

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<td>WI_VACATION_TAKE</td>
<td>550.000000</td>
<td>Vacation Used</td>
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  o This employee received 91 hours of donation in PP20
  o WI RECIPIENT, WI_REC_VAC_ADJ, WI_REC_VAC_BAL, and WI_VACATION_BAL all increased by 91 hours from PP19
  o Use the WI_ABS_MANUAL_ADJUSTMENTS query to see the donations by employee.
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 by clicking on the PI Entries field, under the Generated PI Entries screen.

Step 1: Navigate to the View Transaction History screen

- Click Search
- From the Search Results list, select the Leave Program that matches the type of leave being reviewed

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.
**Step 3:** Expand to See Donor Emp 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.
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.

- Click **Add** once the Leave Program is selected.
**Step 2: Adjust Leave Program Balances 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 **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 *Receive Donation Vacation.*

**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 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 sent to wrong recipient.
- **Click Save**

**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 vacation to the same employee.

On the Results by Calendar Group screen the WI_DON_LEGAL_BAL increased for the 16.0 hours. Once the correcting adjustment processes, the balance will be 0.0 hours.

WI_REC_VAC_BAL was 506.0 hours in PP4. This increased 16.0 hours in PP5. Once the correcting adjustment processes, the balance will decrease by the 16.0 hours back to the 506.0 hours.
To correct, you must enter two absence adjustments using the recipient’s Empl Id. Once you have made the correcting adjustments, you can enter the correct donation following the instructions for ENTERING LEAVE DONATIONS above.

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.
When donations are approved or entered into the system after the fact, you must manually adjust the vacation hours for the recipient to use the vacation in a past pay period. Enter through an Absence Adjustment the amount of vacation needed the pay period prior to the pay period you will be using the hours on the timesheet. Then deduct the vacation hours in the pay period the donations were originally made in. No adjustments are needed for the donor.

Open the original Absence Adjustment the Donation was processed in. In this example the donation was processed in 2021B02.

Add a new row, Element Type WI_Vacation and decrease by the number of full hours you are moving to the prior pay period. In this example we are moving 3.0 hours.
In the prior pay period add a new row Element Type WI_Vacation and increase by the number of full hours you are moving to prior pay period. (We need to use the vacation in PP 2021B01, so adding to PP 2020B27.) Once the next Absence Calculation is run, the additional vacation will be available for use on the timesheet.

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

There is a known issue that the Catastrophic leave process in the system only applies the donation to the recipient under Empl Rcd 0. If the employee is active under any other Empl Rcd, the donation will show for the donor, but not for the recipient. The vacation hours must be manually adjusted for the recipient.

You must still run the “donation process” so the donation hours are recorded. Then you create a manual absence adjustment for the recipient for the same pay period and number of hours as the donation transaction. The downside is the WI Recipient, WI REC VAC ADJ and WI REC VAL BAL fields will not be updated on the Results by Calendar Group screen. You must manually monitor the total donations to the recipient. **The manual absence adjustment for the increased vacation balance is against the Empl Rcd the employee is active in. No adjustment to Empl Rcd 0 is needed.**
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 2021 vacation balance. 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.
YEAR END DONATIONS

Only process the donations in the calendar year that are needed in that calendar year, allowing enough for the year end split pay period. 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 second 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.
There are 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.

You need to process your donations in the system the pay period prior if there are sufficient leave donations. Otherwise, you will have to process the donations in the pay period following and then process an Absence Adjustment to move the donations to the prior pay period, which means the recipient will not be able to be paid in the split pay period and will receive retro pay in the following pay period.

If donations are keyed in a split pay period, they will remain unprocessed until the following pay period.