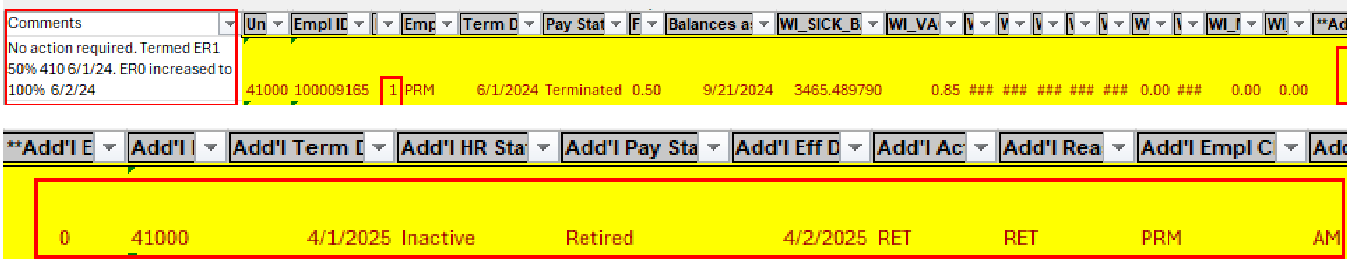
Quick Guide for Zeroing Balances for Terminated Employees

Revised 11/14/25

DOA CP monthly distributes a query “WI_ABS_TERMS_W_BALANCES” identifying potential employees that did not have their leave balances zeroed when their positions were terminated. These employees need review to see if action is required.

The best practice is to create a folder for these queries and note if after reviewing the employee no action required. When a new query is received; do a “compare” to identify employees that can be skipped for review.

Example:



Comments	Un	Empl ID		Emp	Term D	Pay Stat	F	Balances a	WI_SICK_B	WI_VA	V	V	V	\	V	W	\	WI_I	WI	**Ad
No action required. Termed ER1 50% 410 6/1/24. ER0 increased to 100% 6/2/24	41000	100009165	1	PRM	6/1/2024	Terminated	0.50	9/21/2024	3465.489790	0.85	###	###	###	###	###	0.00	###	0.00	0.00	

**Add'l E	Add'l I	Add'l Term D	Add'l HR Sta	Add'l Pay Sta	Add'l Eff D	Add'l Ac	Add'l Rea	Add'l Empl C	Add
0	41000	4/1/2025	Inactive	Retired	4/2/2025	RET	RET	PRM	AM

1. If the Action Reason in Job Data is Termination and then Hired/Rehired, the system creates new absence entitlements. If the Action reason is Transfer, the system will NOT create new absence entitlements.
    - When termed from one agency and rehired from another agency, the adjustment should be made against the sending agency in the pay period termed. If not, the employee will not drop out of this query.

      If the sending agency does not zero the balances, the receiving agency SHOULD NOT make an adjustment in the pay period hired. Instead create a ticket and submit to DOA CP to process the necessary adjustment against the sending agency. Otherwise, the employee will never drop from the query.

    - This query identifies the agency the employee last terminated from on a given Empl Rcd (Column B – Unit). If moving between agencies, the sending agency is not going to be able to tell if the receiving agency made an adjustment in the pay period of hire. To avoid doubling the absence adjustment, create a ticket and submit it to DOA CP to review and determine if an adjustment is necessary. If not necessary, the agency should make comment on the report for future reference. See example above.

2. Use Job Data and Results by Calendar Group screens. If necessary, create an absence adjustment in the pay period the employee termed to zero leave balances.

3. DO NOT enter absence adjustments to zero balances for employees that termed prior to the locked absence period (12/17/2023 or earlier). The absence calendars are locked and the adjustment will not be processed.
    - Exception: if the individual was eligible for a Sick Leave Certification and it is just being submitted. Submit a ticket to zero the sick leave, indicating late submittal of Sick Leave Credit Certification.

      Or the SLCC was submitted timely, but the sick leave was not zeroed out at the time, indicate Sick balance not zeroed at time of SLCC submittal.

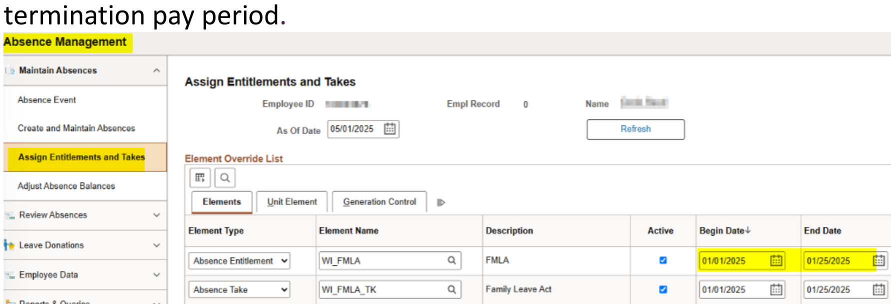
When reviewing your employees keep the following in mind:

- Rows highlighted yellow: scroll to the far right and review the Add'l ER data. If the employee is currently active in a position eligible for leave, you may not need to remove the balances. I.e., terminating a permanent position to take an unclassified position and vice a versa. 2 – 50% positions being combined into 1 – 100%. Agency should review the balances to make sure they are correct. If in doubt, submit a ticket for review. See example above.
  - If showing Inactive, review the employee if moved to a position eligible for leave after the term date of the original position you are reviewing. The balances may have transferred.

    Note: Project/Project positions with no prior permanent service must have their balances, including sick, zeroed upon movement to new Permanent or Project position.

- If zeroing FMLA Balances: Go to the Assign Entitlements and Takes screen. You need to determine the last pay period the FMLA entitlement was active.

  If the FMLA Entitlement ended prior to the termination date, zero it out in the last pay period the FMLA Entitlement was active. If FMLA Entitlement is still active at time of termination, zero it out in the termination pay period.



- Year End Terminations: When zeroing balances for yearend terms use the appropriate calendar. Terminations with last day on payroll as 12/31/## (effective 1/1) use 202#B02. Terminations with their last day on payroll 1/1 or later, zero their balances in 202#B02A.

  Note: If there are C/O balances from one year to the next, instead of making the absence adjustment entries on PP202#B02A reducing the C/O balances; make the entries in PP202#B02 reducing the absence type balance. I.e. 2024 WI_CCR_OVER_6_BAL 24.00. Enter absence adjustment in PP2024B02 -24.00 WI_Vacation_BAL.

- Termination in the yearend split pay period: If the employee is not active on the last day of the pay period, the system will not give them their new year entitlements. Any LH, PH or Vac hours the employee is using in the split period requires an absence adjustment in 202#B02A to add the matching number of absence hours the employee is using. Carryover balances, Sabbatical, Sick and Catastrophic leave from previous year will be available. So do not remove those adjustments.

- Employee has 2 <u>active leave earning</u> Empl Rcds. 1 is termed and 1 is active. An employee only has 1 leave bucket, even though the RCG screen shows a calendar for each Empl Rcd. DO NOT zero the leave balances on the termed Empl Rcd. The system should create the auto adjustments for Vac and LH. The agency with the remaining active Empl Rcd should review the balances in the following pay period.
  - If the only active Empl Rcd left is an LTE, which is not eligible for leave, then you do zero the balances against the Empl Rcd that earned the leave.

- The employee is on LOA from 1 Empl Rcd to fill an unclassified appointment in another Empl Rcd. When the unclassified appointment is termed and the employee returns from LOA on the other Empl Rcd, DO NOT zero out the leave balances on the termed unclassified Empl Rcd. This employee will continue to show on the monthly query. Make a comment that the leave balances need to remain because they transferred to the other appointment. See example above.

<u>Termination for Misconduct:</u>
excerpt under ER 18.02 (2) of the Admin Code, reference is ER 18.02 (2)(b)2m/b. (b) The continuous employment status of an employee eligible for annual leave shall not be considered interrupted if the employee: 1. Was on an approved leave of absence. 2m. Left the service and is reemployed within 5 years, subject to the following: a. Employment prior to leaving the service and upon returning to the service within 5 years must be as a permanent, classified employee or as an unclassified employee other than a limited term employee. b. Any return to service following termination for misconduct or delinquency is deemed to not be a qualifying reemployment under this provision, even though the return is within the 5 year period.

<u>Sick leave balance transfers to other affiliates:</u>
Zero leave balance including sick and report the balances on the Personnel Transfer Record (PTR).

- If an employee is moving between a state agency and one of the authorities listed below, the sick balance does not transfer. In these situations, sick leave remains on account for 5 years.
  - Fox River Navigational System Authority
  - Health Insurance Risk-Sharing Plan Authority (HIRSP)
  - University of Wisconsin Hospitals & Clinics (UWHC) including the Authority and Board
  - Wisconsin Aerospace Authority (under Legislative Assembly)
  - Wisconsin Economic Development Corporation (WEDC 0001196)
  - Wisconsin Health and Educational Facilities Authority (WHEFA 0001171)
  - Wisconsin Housing and Economic Development Authority (WHEDA 0001151)

<u>Non-retired and not transferring to another affiliate:</u>
Sick leave will remain on the employee's balances for 5 years,

  - Exception for the 5-year period for certain former executives returning to executive positions as detailed at s. 230.35 (2), Wis. Stats, and ER 18.03 (5) (b), Wis. Adm.
  - Exception of when sick leave is zeroed out, termed for misconduct.

<u>Retired:</u>
Verify that your agency submitted the Sick Leave Certification.

- Zero the sick leave balance.
- The only times the sick leave would not be zeroed is when the employee is not eligible for certification. The sick leave remains on account for 5 years. If the employee is rehired after 5 years, the system should automatically remove the sick leave balance. But check the Sick balance upon rehire to just make sure.

- **<u>Sick Leave Conversion Program Employer Manual</u>**