

State of Wisconsin

Department of Administration

Catastrophic Leave Donation

Job Aid

Version 5.0.

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| 2.0 | 9/26/18 | Stacie Happel | Update - Unpublished |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 |
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| 5.0 | 1/2023 | Brenda Williams | Updates for Absence Redesign – New Catastrophic Leave Entitlement |

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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 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 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.

The screenshot shows the 'Results by Calendar Group' interface for an employee. The 'Accumulators' tab is selected, displaying a table of leave-related items. A red box highlights the following rows:

| 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.

The screenshot shows the 'Results by Calendar Group' interface for an employee. The 'Accumulators' tab is selected, displaying a table of donation leave types. The following rows are visible:

| 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.

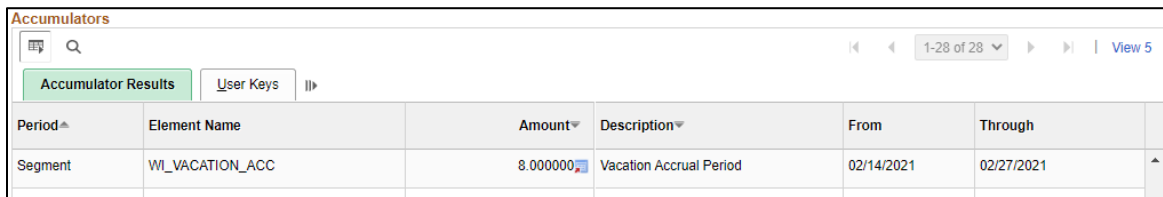
ENTERING LEAVE DONATIONS

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.

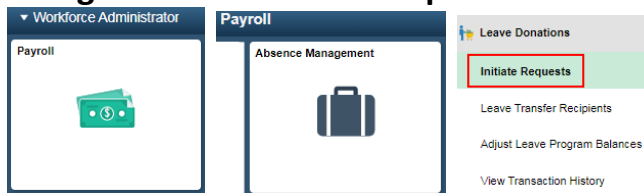
The recipient must use all available earned/accrued leave credits before using leave donations. The employee may not have a leave balance of more than 16 hours of combined "accrued" vacation, sick, sabbatical/termination leave, personal holiday, and legal holiday. *This does not mean the employee must use all awarded vacation and legal holiday but they must use all earned/accrued vacation and legal holiday.*



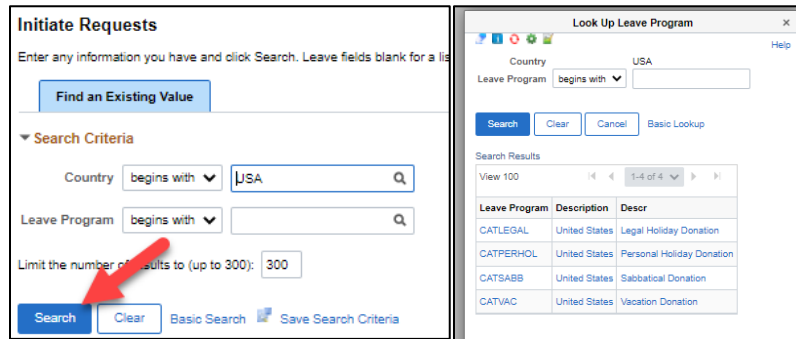
| Period^ | Element Name | Amount^ | Description^ | From | Through |
|---------|-----------------|----------|-------------------------|------------|------------|
| Segment | WL_VACATION_ACC | 8.000000 | Vacation Accrual Period | 02/14/2021 | 02/27/2021 |

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.

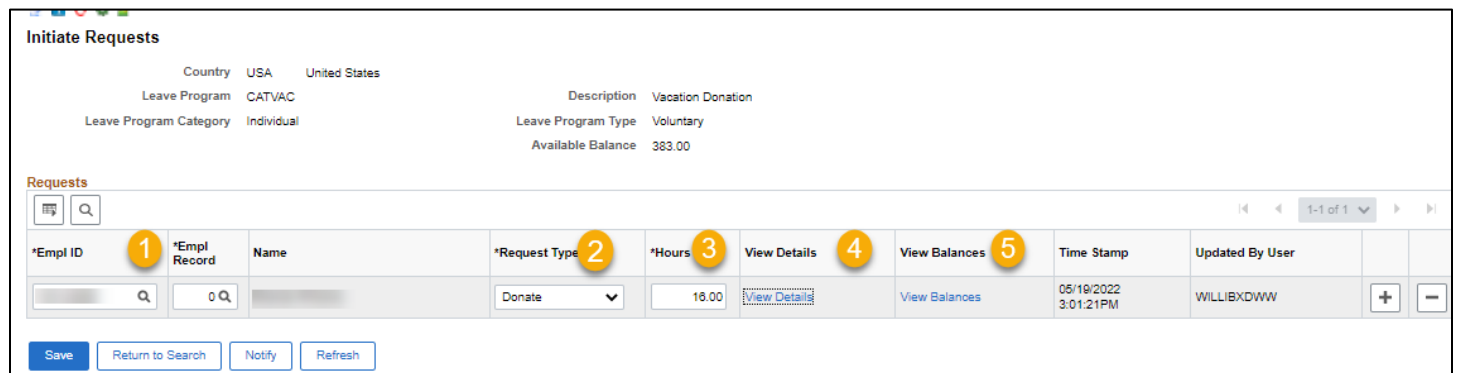
Navigate to the Initiate Requests screen



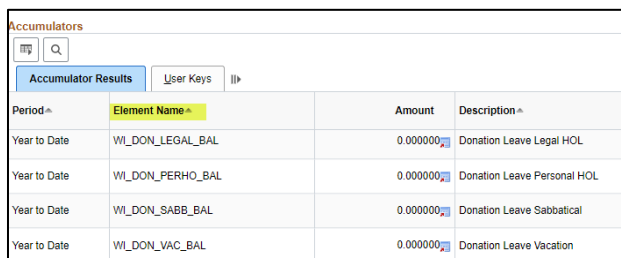
- From the Search Results list, Country field must be USA.
- Click **Search**
- Select the *Leave Program* that matches the type of leave being donated.



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 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. 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.
 - a. Recipient Emplid and Employee Record fields are not available.
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. The system will default to a person’s active Empl Rcd.
 - b. If the employee has multiple active “eligible” Empl Rcds, it displays the message to pick which Empl Rcd they want to donate the leave to. (See example below.)
5. Click on the person’s name from the Look Up Recipient Emplid drop down list.
6. 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 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

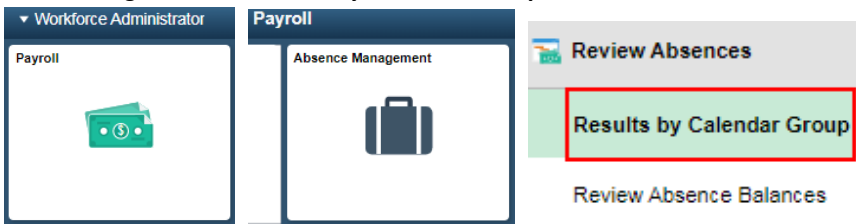
Since the leave entitlements are in one bucket, regardless of the number of active “leave eligible” Empl Records, simply make one entry on the “Initiate Request” screen under the lowest active eligible Empl Record. There is no need to split the requests between the Empl Records.

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.

Results by Calendar Group
Enter any information you have and click Search. Leave fields blank

Search Criteria

Empl ID begins with [REDACTED]

Empl Record = [REDACTED]

Calendar Group ID begins with [REDACTED]

Name begins with [REDACTED]

Limit the number of results to (up to 300):

Basic Search

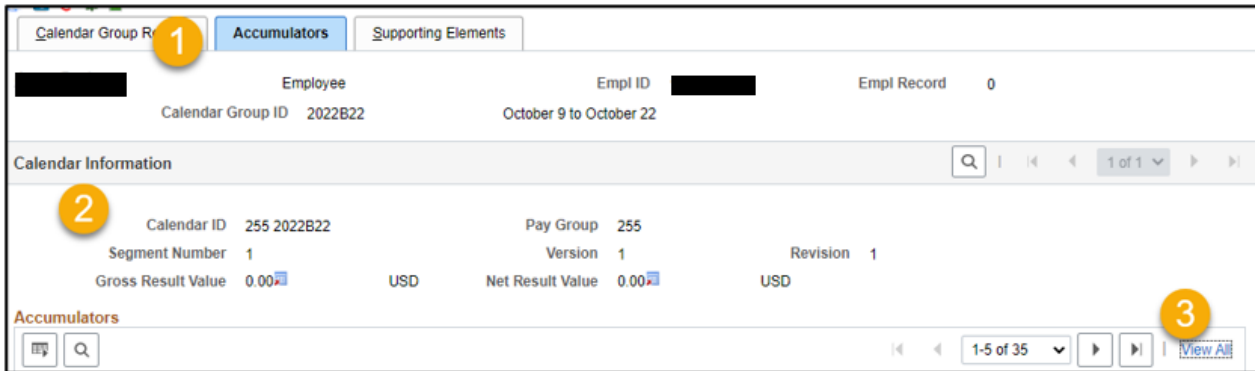
Search Results

View All << 1-100 of 178 >>

| 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 |
|--------------|-------------------|-----------|--------------|

- 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 | | | |
|---------------------|---------------|-----------|--------------------------------|
| Accumulator Results | | User Keys | ▶ |
| 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.

| All manual adjustments by EE 3 | | | | | | | | | | | |
|--------------------------------|-------------|---------|----|------|------------|-----------|--------------|----------|------------|-----------------|---------|
| 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 | |

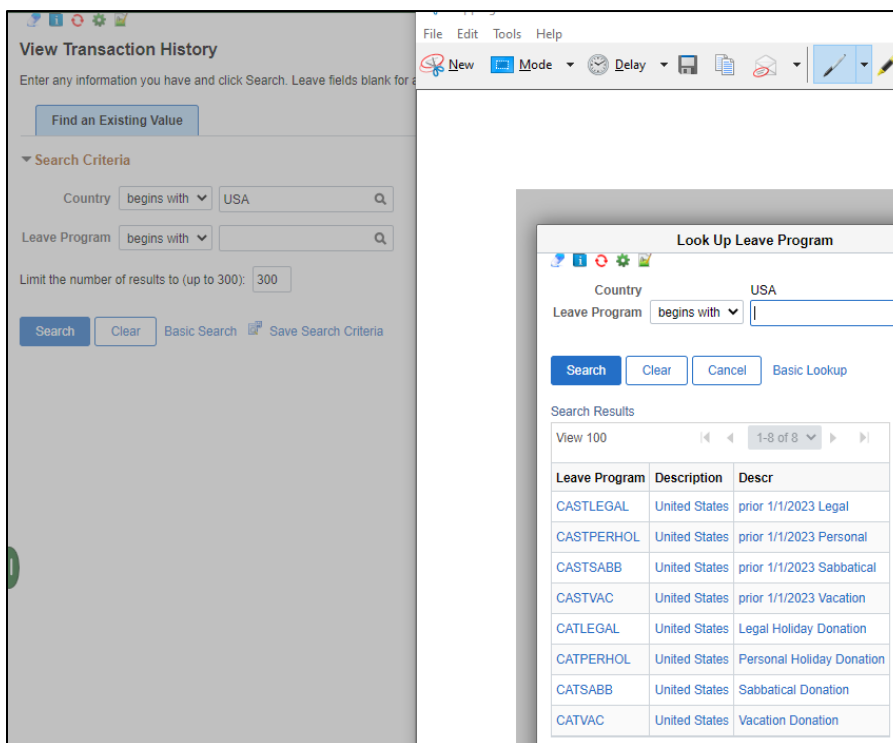
Option 2: Review by Donation Transaction screen

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 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 | | PI Entries | 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 WL_CATREC | Catastrophic Donation Receive | 8.000000 |
| 2 | [REDACTED] | Donor | 0 WL_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 |

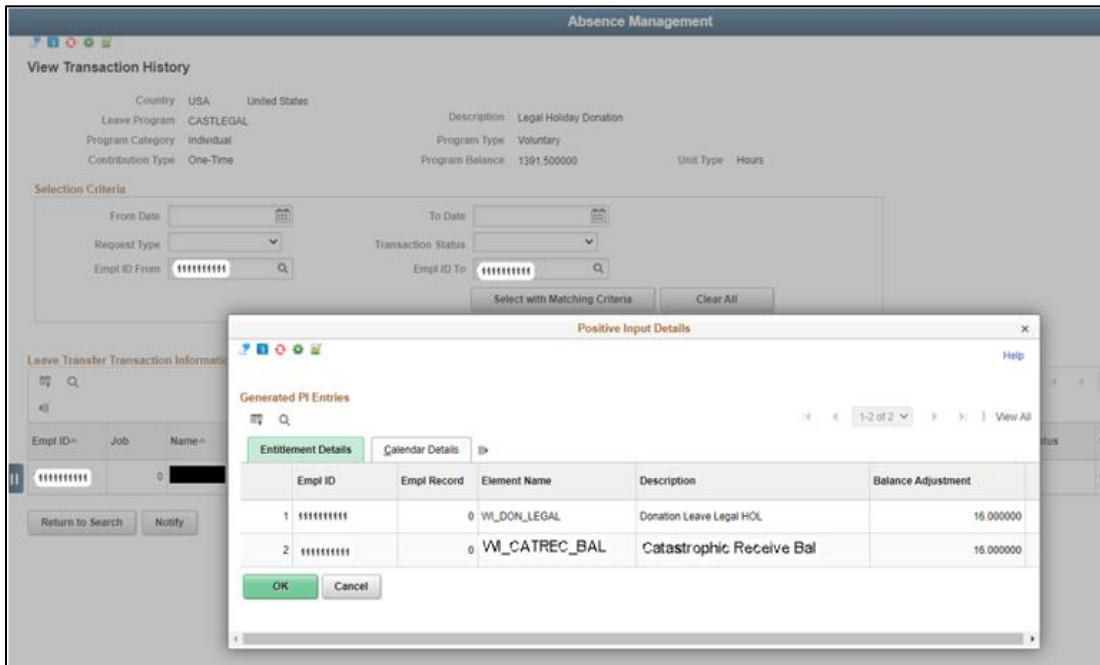
RESULTS: After the Absence Calculation runs, the donor and recipient balances are adjusted.

- ✓ 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.

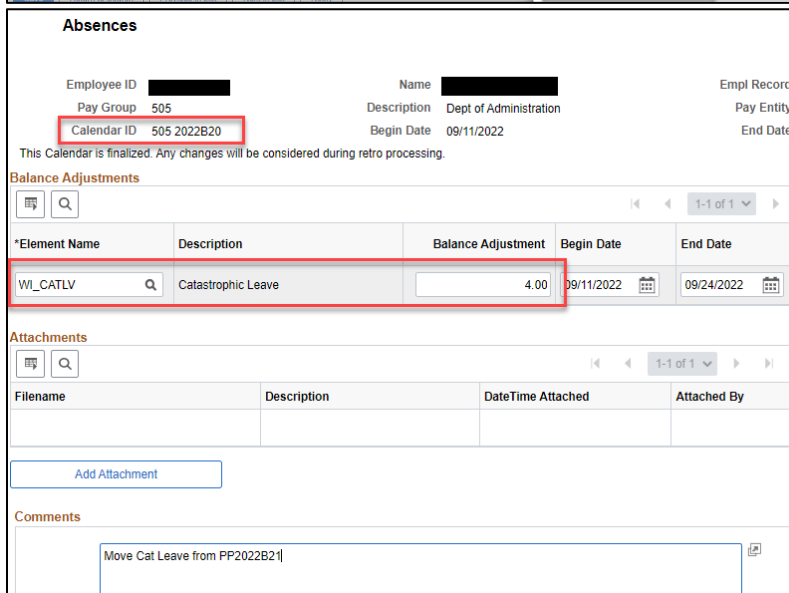
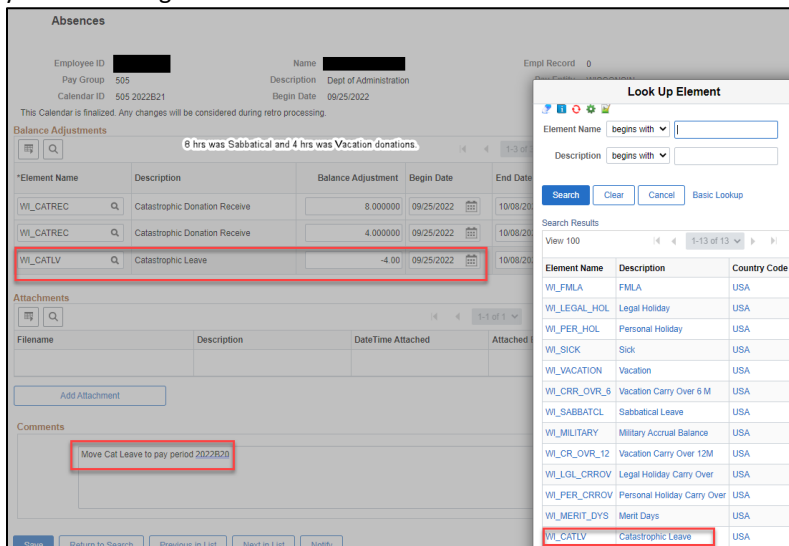
APPLYING DONATIONS TO A PRIOR PAY PERIOD

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.



WHEN RECIPIENT IS ACTIVE IN AN EMP RCD OTHER THAN 0

There is a known system issue in the Catastrophic Leave Donation process. The system only applies the donation to the recipient under Empl Rcd 0. If the employee is not active under ERO and only active under another Empl Rcd, the donation will show for the donor, but not for the recipient. The Catastrophic Leave hours must be manually adjusted for the recipient.

The Initiate Request must still be entered and the donation processed so the donation hours are recorded. Then you create a manual absence adjustment under the recipient's active Empl Rcd for the same pay period and number of hours as the donation transaction. The downside is the recipient's WI_CATREC_BAL and WI_CATREC_ADJ 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 Catastrophic Leave balance is against the Empl Rcd the employee is active in. No adjustment needed against Empl Rcd 0.

Absences

Employee ID [REDACTED] Name [REDACTED] Empl Record
Pay Group 505 Description Dept of Administration Pay Entity
Calendar ID 505 2022B20 Begin Date 09/11/2022 End Date
This Calendar is finalized. Any changes will be considered during retro processing.

Balance Adjustments

| *Element Name | Description | Balance Adjustment | Begin Date | End Date |
|---------------|--------------------|--------------------|------------|------------|
| WI_CATLV | Catastrophic Leave | 40.00 | 09/11/2022 | 09/24/2022 |

Attachments

| Filename | Description | DateTime Attached | Attached By |
|----------|-------------|-------------------|-------------|
|----------|-------------|-------------------|-------------|

Add Attachment

Comments

Entering donated Cat hours as employee is active in Empl Rcd 1 and system defaults donations to Empl Rcd 0.

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

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.