

## Checklist for Academic Leave Process (For the Service Center APA)

### Step 1: Review leave request

- Check overview page for pending leave requests
- Check the status column for any new leave requests
  - New leave requests will have the status: "Pending Initial Review"
- Click on employee's name to view his/her Academic Leave page
- Review/modify content
  - Leave Type
  - Dates
  - Text
  - Attachments

### Step 2: Verify required leave credit availability

- Reconcile starting balance (as needed) and enter leave credit
  - If you receive a new leave request: Calculate off-line how many leave credits the faculty member should have using the sabbatical leave worksheet. For full instructions on establishing a starting balance see link: [add link]
- In the lower right of the faculty member's Profile page, enter the number of credits necessary to bring the total to the correct amount, noting the reason (e.g. "initializing")
  - Click on the Leave Credit Balance value to run a Leave Credit Statement; this may help you understand how the Leave Credit Balance was created
- Check the "I certify" checkbox
- Click "Save"

### Step 3: Add department reviewer (Chairs, Chairs for Joint Appointments, ORU Directors)

- Click "Approver List" (top left)
- Click "Add Approver" button
- Select Chairs, Chairs for joint appointments, and ORU Directors (if applicable) who need to approve this leave request
- Scroll to the bottom and click "Add"
- Contact each of the people you've added as approvers to alert them to the pending Leave Request

### Step 4: Monitor leave request for approvals/disapprovals and notifications

- Monitor the status column for changes throughout the process
  - You will need to take action for any of the following status options:
    - "Requires APA Attention" (This value alerts the APA to a denied request)
    - "Approved, Pending Final Report" (The leave request has been approved by VPAA and is ready to be keyed into the payroll system)
- Look for notifications from Advance after a Leave Request is approved by VPAA:
  - Approval notification to candidate, APA, and approvers is sent when VPAA approves
  - Payroll Record update reminder is sent to the APA one month prior to the start of the leave

**Step 5: Key leave changes in the payroll system**

- Provide appropriate documentation to the VPAA office, upon request

**Step 6: Upon return from leave, make any necessary changes to payroll system if original leave is modified**

- Check Advance for any changes made by the employee that may result in a payroll record Adjustment

<b>Advance Leave Status Options w/ Definitions</b>	
"Pending Initial Review"	leave request submitted by candidate
"Pending Chair Approval"	leave request added to For Review page
"Pending Dean Approval"	leave request approved by Chair
"Pending VPAA Approval"	leave request approved by Dean
"Approved, Pending Final Report"	leave request approved by VPAA
"Requires APA Attention"	a reviewer has selected "I am sending this..." (This value alerts the APA to a denied request)
"Final Report Submitted"	candidate has submitted final report
"Completed"	VPAA has approved the Final Report
"Closed"	item moved to History, not visible on For Review/Overview

**\*If you have a questions regarding sabbatical or professional development leave, contact your VPAA service center representative.**