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 offline 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

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

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