

Steps to Process Medical Leave

1. Leave rep receives an Leave of Absence (LOA) request from employee directly, department rep on behalf of employee, or service link/snapshot request referring to employee
 - a. Department reviews sick and vacation in the Admin/Review Absence Balance accruals for employee in order to counsel employee on their options. Departments must cross-reference TARS to get an accurate recording of sick and vacation hours for time taken during the prior pay period.

2. Leave rep determines eligibility for Family Medical Leave (FML) (12 months of prior service plus 1,250 hours worked)
 - a. Go to job data in UCPATH to find out start date, employee type, FTE, pay period and union code
 UCPATH Navigation: PeopleSoft Menu > Workforce Administration > Job Information > Job Data
 Go to “request extended absence” screen in path to view service months and eligibility hours total (view example below)

UCPATH Navigation: PeopleSoft Menu > Global Payroll and Absence Management > Payee Data > Maintain Absences > UC Customizations > Request Extended Absence

Request Extended Absence	
Empl ID 10027158 Bryson,Orlandrea Desiree	UC Riverside Campus
FMLA/CFRA Eligibility	
Eligible for FMLA?: <input checked="" type="checkbox"/>	FMLA Override: <input type="checkbox"/>
Eligible for CFRA?: <input checked="" type="checkbox"/>	CFRA Override: <input type="checkbox"/>
Service Months: 47.74	Eligibility Hours: 2030.00
Note: Exempt employees may be eligible regardless of the reflected eligibility hours. More Info	

b.

Things to consider: totals may not be accurate if employee is a transfer from another UC, recent new hire, or have had a recent change in FTE

3. Leave rep will need to review records such as manual tracking reports and TARS to see if employee has already used any of their current calendar year FML entitlement (480 hours max or less depending upon prior usage)

**Note: cannot rely on FMLA/CFRA/PDLL Balances & Takes screen in UCPATH under “request extended absence” screen – this function is not calculating correctly at this time*

4. After confirming eligibility and entitlement, leave rep send initial leave packet to employee via email or postal mail within 5 business days of notification of leave request
 - a. Packet includes the following letters or [forms](#):
 - Cover letter (based on LOA type & eligibility/entitlement status)
 - Notice of Eligibility and Rights and Responsibilities
 - Leave of Absence Request
 - Certification of Health Care Provider (self, pregnancy or caregiver)
 - Family & Medical Leave Fact Sheet

- Disability Benefits & Filing Instructions
- FML Benefits Checklist (or is this one N/A now?)
- Others depending on type of leave
 - Declaration of Relationship
 - Pregnancy, Newborn Child and Adopted Child
 - Leave Without Pay
 - Your Rights & Obligations as a Pregnant Employee
 - Exempt Employee Workweek Agreement
 - Certification for Military Caregiver
 - Certification for Qualifying Exigency Leave

5. Leave rep creates electronic phone conversation log, electronic file, physical file for employee, and adds employee to “leave management” report

a. Marks service link/snapshot initiation request complete (if applicable)

6. Leave rep schedules and completes consultation with employee requesting LOA

Consultation to include:

- Continuation of pay options while on leave
- Current sick/vacation balances (review absence balance in path and cross reference with TARS)
- [Disability Benefits](#) waiting period, eligibility, and application process (if applicable)
- [Catastrophic leave](#) eligibility (if applicable)
- How to fill out time record in TARS using correct FML code options
- Benefits continuation (providing benefits summary)

UCPath Navigation: PeopleSoft Menu > Benefits > Review Employee Benefits > Benefits Summary Page

7. Employee will need to complete and return all required documents, including any medical certification or work status report from the physician, within 15 days of receipt (through email, USPS mail, fax or in-person drop off)

Leave rep will need to notify the employee of designation status based on the following:

- Leave rep will grant or deny the LOA request and provide a [Cover Letter](#), **Designation Notice**, and signed LOA Request and to the **employee and their supervisor**, based on receipt of medical certification/work status report and other needed documents

8. (This should be done within 3 days of receipt of medical documentation and for approved LOA’s a Return to Work (RTW) certification should be included as well)

- If Employee does not return the necessary documents to the Leave rep within 15 days, then the leave rep will send a follow-up cover letter to the employee and allow them 5 days to return the packet
- If Employee still does not return the packet to the Department within the allotted time, their LOA Request may be denied and their leave may be unprotected. The leave rep should still send a denial Cover Letter and Designation Form

9. Leave rep submits information into service link/snapshot for entry into UCPath

Leave rep enters initial LOA into UCPATH based on medical certification or work status report dates

UCPath Navigation: PeopleSoft Menu > Global Payroll and Absence Management > Payee Data > Maintain Absences > UC Customizations > Request Extended Absence

10.

*Start Date	*Expected Return Date	Actual Return Date	Leave	FMLA/CFRA/PDLL Leave	Paid/Unpaid	*Last Date Worked	FMLA/CFRA/PDLL Adjustment Hours	Notes	Save	Submit
01/01/2020	02/01/2021			Employee's SHC-FMLA	Paid-Block	12/31/2020		Notes	Save	Submit

11.

Leave rep will need to review LOA employee time records in TARS for accuracy and completeness (if necessary make corrections) will need to submit to UCPATH payroll during bi-weekly or monthly payroll cycle

12.

Leave rep tracks usage of FML duration and hours in a report to be sent out bi-weekly or as requested by department

13.

Leave rep maintains contact with employee throughout leave (especially for PDL and CFRFA or extended/long term leaves)

14.

Leave rep reminds employee and supervisor of the need for a return to work note from the physician at least 5 days prior to return (*note: employee cannot return unless they provide clearance and/or accommodation request)

15.

LOA employee sends updates of their FML status via email, phone, fax or in person drop off of medical certification to leave rep (including medical clearance or accommodation request if applicable)

16.

Leave rep communicates with supervisor (and all required parties) of any changes to the leave duration (if applicable)

17.

Changes to leave may include:

- a. Designation Letter Change of FML type (i.e., FML ending and Supplemental FML beginning)
- b. Extension of FML
- c. Early return to work from FML
- d. Any work restrictions (Temporary or Permanent)

18.

Employee/Supervisor notifies Leave rep that the employee is returning to work. Employee must provide either a Return to Work Certification signed by the Medical Provider or a Medical Certification with a return to work date

19.

Have LOA employee email you on day of return to confirm that they are physically back at work and verify with supervisor of their return as well

20.

Leave rep submits ServiceLink/SnapShot request to Return employee to work (If applicable)

Leave rep needs to transact "actual return" to work date in UCPATH once confirming employee has physically returned

UCPath Navigation: PeopleSoft Menu > Global Payroll and Absence Management > Payee Data > Maintain Absences > UC Customizations > Request Extended Absence

21.

*Start Date	*Expected Return Date	Actual Return Date	Leave	FMLA/CFRA/PDLL Leave	Paid/Unpaid	*Last Date Worked	FMLA/CFRA/PDLL Adjustment Hours	Notes	Save	Submit
01/01/2020	02/01/2021	02/01/2020		Employee's SHC-FMLA	Paid-Block	12/31/2020		Notes	Save	Submit

22. Leave rep will restore the employee to same or equivalent position upon return to work, unless certain accommodations or work restrictions are required. If applicable:

a. Leave rep coordinates with the [disability management](#) coordinator when appropriate

If employee is released with temporary work restrictions, please forward a copy of the restrictions to the Disability Management office. The Disability Management office will engage in the interactive process with the supervisor and employee to determine potential reasonable accommodations.

When a reasonable accommodation is available, the Disability Management office will provide the Transitional Return to Work (TRTW) Agreement for the employee and supervisor to sign.

When a reasonable accommodation is not available, the department or supervisor must notify the employee that they will continue to be off work until they are able to return to full duty or when reasonable accommodation is available.

23.

*Note: The Department will notify the Benefits Office and Disability Management Office when an employee has been off work for five consecutive months. The Disability Management office will continue to engage with the employee and department if the employee continues to be off work or the work restrictions are deemed permanent. The Disability Management office will collaborate with the benefits office on the 6-month mark to discuss benefits eligibility if the employee is unable to return to work (i.e. regular retirement, waiver of premium, social security disability benefits, long-term disability through Lincoln Financial Group and UCRP Disability Income)

Process will continue until the employee has returned to work with no restrictions or with a reasonable accommodation for permanent restrictions

Throughout the process maintain all records properly according to federal and university guidelines for compliance

24.

*Leave rep is defined as any title, who is handling any part of the leave process (leave admin/HR Generalist)

Helpful Links

- [U.S Department of Labor – Family and Medical Leave Act](#)
- [UCR Human Resources – Leave of Absence Forms & Documents](#)
- [UCNet – Leaves of Absence](#)

Having a Baby

- [UCnet – What to do if You're Having a Baby](#)

Adopting a Child

- [UCnet – What to do if You're Adopting a Child](#)