

## Benefit and Leave Changes under UPS

This document summarizes the notable policy changes for benefits and leave that will take effect as a result of UPS. The document is intended for reference only.

Vacation UPS OP: BN 1	University Staff			Annual (12 mo) Academic Staff, Faculty and Limited NOTE: Not applicable to Academic year (9 month) Faculty and Instructional Staff	Notable Policy Changes
<b>Leave Accrual and Use Calendar</b>	Calendar Year			Fiscal Year (July 1 – June 30)	No Change
<b>Eligibility for Paid Vacation</b>	All university staff, except those in a temporary appointment, are eligible for paid vacation.			Must be expected to work at least 1/3 of full-time (440 hours) for at least one calendar year	No Change
<b>Vacation Accrual</b>	Prorated estimated vacation is granted upon hire and again on January 1st of every year based on the Annual Bracket Factor. Vacation accruals are adjusted according to the bracket factor based on the actual number of hours in pay status.			Prorated estimated vacation is granted upon hire and again on July 1st of every year.	No Change
<b>Schedule of Annual Vacation Leave</b>	Years of Service	FLSA Non-Exempt	FLSA Exempt*	<b>Full-time employees</b> earn 176 hours (22 days) of vacation per fiscal year. Vacation is pro-rated if part-time.	Vacation accruals are staying the same with the exception of “working supervisors” who are FLSA non-exempt. They will earn vacation at higher FLSA exempt rate.
	First 5	104	120		
	5+ to 10	144	160		
	10+ to 15	160	176		
	15+ to 20	184	200		
	20+ to 25	200	216		
	25 & Over	216	216		
	*Includes Non-Exempt Supervisors				
<b>Use of Vacation</b>	University Staff can use vacation as of the first day of employment.			Can use vacation from the first day of employment	Classified staff could use vacation following initial 6-month probation. University staff can use vacation from day 1 of employment. No change for Academic Staff, Faculty and Limited.
<b>Reporting Increments</b>	FLSA exempt: half or whole day increments; actual time missed if part-time FLSA non-exempt: 15 minute increments				Change to reporting rules based on FLSA Status rather than employee classification.

<b>Vacation UPS OP: BN 1</b>	<b>University Staff</b>	<b>Annual (12 mo) Academic Staff, Faculty and Limited</b> <b>NOTE: Not applicable to Academic year (9 month) Faculty and Instructional Staff</b>	<b>Notable Policy Changes</b>
<b>Vacation Carryover Provisions</b>	Vacation may be carried over for one calendar year.	Vacation may be carried over for one fiscal year.	No Change
<b>Vacation/Paid Leave Banking Schedule</b>	Eligibility to bank is outlined each fall with options available through the end of the year. No changes to the banking schedule. The banking schedule is based on years of continuous service/FLSA status but banking may be allowed prior to schedule due to cumulative sick leave accrual.	Eligibility to bank unused vacation is offered in July following the qualifying fiscal year based on a minimum of 10 years of continuous service and appointment percentage	No changes to the banking schedule or amounts.
<b>Hours available for Vacation/Paid Leave Banking</b>	Full-time employees are eligible to bank unused vacation (either vacation earned in the current calendar year or vacation carried over from prior calendar year) into a paid leave bank	Full-time employees are eligible to bank unused vacation (either vacation earned in the current fiscal year or vacation carried over from prior fiscal year) into a Paid Leave Bank (ALRA) account. Cash payouts are not permitted.	Allows University Staff to bank current year and carryover vacation. Classified employees were only eligible to bank current year unused vacation.
<b>Vacation Cash-Out</b>	Employees earning vacation at the 200 hour rate can receive up to 40 hours of the amount of leave that can be banked as a cash payout.	Not eligible	No Change
<b>Changing Leave Type Used after Reported</b>	Any change requests must be received by the institution by end of calendar year in which the absence occurred	Any change requests must be received by the institution by end of fiscal year in which the absence occurred	Formal deadlines for change requests
<b>Vacation Credits upon Retirement, Layoff, Termination</b>	At termination or retirement, employees are eligible to receive a lump sum payment of any remaining vacation and/or banked vacation hours. If the termination is not the result of layoff or termination for cause, the institution may allow the employee to extend their termination date beyond the last day worked by vacation and/or banked vacation hours. Extending time on payroll must be approved by the employer under the UPS policy.	Under pre 07/01/2015 rules, Classified employees could use accumulated leave to remain on payroll if not layoff/termination for cause, without permission from the institution.	
<b>Movement to New Appointment within UW System and/or State Agency</b>	Current vacation earned during the calendar or fiscal year shall transfer to the new leave-eligible appointment. Hiring authority will determine if banked leave and carryover are allowed to transfer or should be paid out as a lump sum prior to transfer. Vacation will be paid out if the employee moves to an appointment which is ineligible for earning vacation.	Clarified existing policies surrounding transfers for all employees. Classified project employees who never attained permanent status were only eligible to transfer personal holiday hours prior to UPS.	

<b>Personal Holiday/Legal Holiday UPS OP: BN 2</b>	<b>University Staff</b>	<b>Annual (12 mo) Academic Staff, Faculty and Limited</b>	<b>Academic (9 mo) Faculty and Instructional Staff</b>	<b>Notable Policy Changes</b>
<b>Leave Accrual and Use Calendar</b>	Calendar Year	Fiscal Year (July 1 – June 30)		No Change
<b>Eligibility for Personal Holiday</b>	University staff, except those in temporary appointment (LTE) and crafts, are eligible for Personal Holiday.	Must be expected to work at least 1/3 of full-time (440 hours) for at least one calendar year	Not eligible for personal holiday.	No Change
<b>Personal Holiday Leave Accrual</b>	36 hours (4.5 days). If the hours are not used by the end of the designated year, the hours are lost and cannot be carried into the following year	N/A		No Change
<b>Use of Personal Holiday Leave</b>	Personal holiday hours are available for use from the first day of employment, subject to approval by the employee's supervisor.	N/A		University Staff will not be required to pay back used Personal Holiday if they terminate within the first 6 months.
<b>Personal Holiday Leave Reporting Increments</b>	FLSA exempt: half or whole day increments; actual time if part-time FLSA non-exempt: 15 minute increments	N/A		Change to reporting rules based on FLSA Status rather than employee classification.
<b>Eligibility for Paid Legal Holiday</b>	All employees who earn sick leave are eligible for paid legal holidays provided that the employee is actively employed on the date of the legal holiday and meets the criteria set forth in the policy.			No Change
<b>Use of Paid Legal Holiday</b>	If eligible, Full-time employees earn eight hours of paid leave for each legal holiday; part-time employees earn a prorated amount based on their hours worked during the pay period that includes the legal holiday.			No Change
<b>Personal Holiday Leave upon Retirement, Layoff, Termination</b>	At termination or retirement, employees are eligible to receive a lump sum payment. If the termination is not the result of layoff or termination for cause, the institution may allow the employee to extend their termination date beyond the last day worked. Extending time on payroll must be approved by the employer under the UPS policy. Removed requirement for University staff to repay at termination during probation.	N/A		Under pre 07/01/2015 rules, Classified employees could use accumulated leave to remain on payroll if not layoff/termination for cause, without permission from the institution.
<b>Movement to New Appointment within UW System and/or State Agency</b>	Personal holiday hours will transfer to the new appointment, provided the new appointment is eligible for personal holidays. Employees who move between employee classifications will be given consideration for leave accrual schedule differences, not to exceed two allocations in an 18-month period			No Change - formalizing existing practice

Sick Leave UPS OP: BN 3	University Staff	Annual (12 mo) Academic Staff, Faculty and Limited	Academic (9 mo) Faculty and Instructional Staff	Notable Policy Changes
<b>Eligibility for Sick Leave</b>	All classified permanent and project employees (no minimum appointment percentage or employment duration); LTEs are not eligible	Must be expected to work at least 1/3 of full-time (440 hours) for at least one calendar year	Must be expected to work at least 1/3 of full-time (440 hours) for at least one academic year with the expectation of renewal.	No Change
<b>Full-time Employee Sick Leave Accrual Schedule</b>	All classified permanent and project employees earn .0625 hours of sick leave for each hour in pay status up to five hours per bi-weekly pay period (130 hours per calendar year)	<b>Initial Entitlement:</b> 176 hours for use during the first 18 months of employment (prorated for part time). After Initial Entitlement period, earn 96 hours (12 days) of sick leave per fiscal year		No Change
<b>Rehired Annuitant Eligibility</b>	A rehired WRS annuitant is eligible to earn sick leave if position is eligible. A rehired annuitant is <u>not</u> eligible to receive a sick leave initial entitlement			This administrative change applies to all rehired annuitants, regardless of origin.
<b>Initial Entitlement (Does not apply to University Staff, but will factor into Exempt University Staff choosing to move to Academic Staff).</b>	<p>If an employee retires during the 18-month initial entitlement period, the entire amount of the Initial Entitlement will not be available for sick leave credit conversion. The number of sick leave hours available for conversion will be equivalent to what the employee would have earned if not in the Initial Entitlement period.</p> <p>The 18-month Initial Entitlement period begins on the first day of sick leave eligibility and ends 18 months later. The 18-month period is <u>not</u> extended if an employee goes on a leave of absence during the Initial Entitlement period.</p>			Clarified proration of Initial Entitlement conversion within 18 months of having the leave granted.
<b>Sick Leave Use</b>	Sick leave cannot be used before it is accrued.	Sick leave cannot be used before it is accrued. Faculty, academic staff, and limited appointees who are granted an Initial Entitlement are eligible to use these hours of sick leave during the first 18 months of employment.		No Change
<b>Reporting Increments</b>	FLSA exempt: half or whole day increments; actual time missed if part-time FLSA non-exempt: 15 minute increments			Change to reporting rules based on FLSA Status rather than employee classification

Sick Leave UPS OP: BN 3	University Staff	Annual (12 mo) Academic Staff, Faculty and Limited	Academic (9 mo) Faculty and Instructional Staff	Notable Policy Changes
<b>Sick Leave Absence Reasons</b>	<ul style="list-style-type: none"> <li>• For personal illnesses, injury, disability, pregnancy, adoption, or exposure to contagious disease</li> <li>• For the care of an immediate family member (for up to five consecutive work days) Additional time off may be approved by the institution</li> <li>• For immediate family or personal medical or dental appointments</li> <li>• Up to three days of sick leave may be used after the death of an immediate family member. An additional four days of sick leave may be used for travel time related to a funeral or other circumstances after the death of an immediate family member.</li> <li>• Any absence covered by the Wisconsin Family and Medical Leave Act (WFMLA)</li> <li>• Those who miss work due to illness for 5 or more consecutive days, must provide written physician certification (does not apply to FMLA approved absences).</li> </ul>			Changes to align all employee classifications under one policy.
<b>Movement to New Appointment within UW System and/or State Agency</b>	All sick leave earned as a UW System employee will transfer to a successive UW System leave-eligible appointment. UPS policies allow for the leave balance to be carried forward to leave eligible appointments within the UW System. (3) All sick leave earned as a University employee will move to a State of Wisconsin agency.			Classified project employees lost accumulated sick leave at the end of their appointment.
<b>Sick Leave upon Termination from the University for Misconduct</b>	If termination from the University is due to misconduct or delinquency, an institution may revoke all unused accumulated sick leave.			This now applies to Faculty, Academic Staff, Limited as well as University Staff
<b>Submitting Time Worked and Leave Used</b>	All leave-eligible university staff are required to submit both time worked and leave taken on a bi-weekly basis either on paper timesheet or electronically	Each leave-eligible UW System faculty, academic staff, and limited appointee is required to submit a leave report on a monthly basis, whether or not leave is used. Any faculty, academic staff, or limited appointee who fails to file a report on leave usage as required by UW System policy in one or more months of any year shall not be permitted to accrue sick leave for that year in an amount exceeding the cap (i.e., 8.5 days if annual-basis or 6.4 days if academic year - basis).		No Change. Details added to policy for ease of administration.
<b>Changing Leave Type Used after Sick Leave Reported</b>	Any change requests must be received by the institution by end of calendar year in which the absence occurred	Any change requests must be received by the institution by end of fiscal year in which the absence occurred		Formal deadlines for change requests

Sick Leave UPS OP: BN 3	University Staff	Annual (12 mo) Academic Staff, Faculty and Limited	Academic (9 mo) Faculty and Instructional Staff	Notable Policy Changes
Sick Leave Conversion at Layoff, Retirement or Death	UW System employees are eligible for the conversion of their sick leave credits to pay for State Group Health Insurance at layoff, retirement, termination with 20 years of state service, or death provided eligibility requirements are met under the Accumulated Sick Leave Conversion Credit (ASLCC) and Supplemental Health Insurance Conversion Credit (SHICC) programs as outlined in Wis. Stat. §§ <a href="#">40.05(4) (b)</a> and <a href="#">40.95</a> .			No Change
Sick Leave Restoration After Break in Service	If employee does not take WRS annuity or have 20 years of WRS creditable service, sick leave balance will be lost unless employee returns to a State of WI or UW sick-leave eligible position within 5 years.	If employee does not take WRS annuity or have 20 years of WRS creditable service, sick leave balance will be lost unless employee returns to a State of WI or UW sick-leave eligible position within 3 years or applies to a UW position within three years and is ultimately hired into that position. If an unclassified employee returns to a classified position within 5 years, sick leave will be re-instated.		No Change

**Other Policy Changes to Note:**

**State Group Health:** University Staff LTE employees will be eligible for the employer contribution for Health Insurance after two (2) months of WRS State Service as of 7/01/2015. Prior to UPS LTE employees needed 6 months of WRS State Service to be eligible for the employer contribution towards State Group Health Insurance.

**FMLA/WFMLA:** Effective January 1, 2016, WFMLA and FMLA allocation granted on CY-basis to align with state law for all eligible employees.

**Non-Medical Leave of Absence:** UPS policy will now cover all employees with uniform rules.

**Catastrophic Leave:** Classified employees could only donate to and receive leave from other classified employees (same applies to unclassified employees). Under UPS, Employees will be able to donate leave to and receive leave from any leave-eligible employee, regardless of employee classification

**No written policies for FASLI; needed to bring over classified rules in statute or they would no longer apply to US**

- **Jury Duty:** Employees who earn sick leave eligible for leave with pay for grand or petit jury duty; applies the university staff policy to faculty academic staff and limited appointees.
- **Voting Time:** All employees eligible for up to 3 hours off work to vote if unable to vote outside of working hours. FASLI & US who earn sick leave are entitled to leave with pay.
- **Election Officials Time Off on Election Day:** All employees eligible for leave to serve as election official on election day; FASLI & US who earn sick leave are entitled to leave with pay; deduct election official pay from state pay; if paid leave used, no deduction of election official pay.
- **Hostage Leave:** Up to 45 days of paid leave after employee taken hostage if certain conditions are met.