

Leave Sharing Process Information for Agencies

Annual Leave Sharing Program (101 KAR 2:106 and KRS 18A.203)

In the event of a catastrophic loss to an employee's personal property, due to either a natural disaster or fire, eligible employees who accrue annual leave, and who have exhausted their leave balances, may have annual leave donated to them by other eligible state employees.

Sick Leave Sharing Program (101 KAR 2:105 and KRS 18A.196 and 18A.197)

In the event of a prolonged or catastrophic illness or injury, or an extended absence due to illness of an immediate family member, eligible employees who accrue sick leave, and who have exhausted their leave balances, may have sick leave donated to them by other eligible state employees.

Listed below is the chronological flow of actions and documents, related to the leave sharing process.

- 1. The HR Administrator is aware of the need for a leave sharing application to be sent to an employee.** The HR Administrator prepares the leave-sharing packet and mails it to the employee or his/her designee if the employee is unable to receive the mailing personally. As part of this process, the HR Administrator can run the **ZTM_LEAVE_RUNOUT** transaction in KHRIS to help project when the employee's accrued leave will be exhausted and to indicate when donated leave may be needed.
- 2. The recipient completes the application and submits it, along with appropriate certification, to the HR Administrator. The HR Administrator reviews the application to ensure that the appropriate certification has been provided and the form is completed correctly.** The HR Administrator should verify that the employee would exhaust his/her leave during the projected absence.

Note: The employee does not have to have exhausted his/her leave before they submit the application. The employee does not have to have already been off for 10 days in order to apply, but must have a situation where it is likely to cause an absence of at least 10 consecutive working days. The HR Administrator creates a file folder for the recipient. All medical information must be kept in a locked file, separate from the personnel files.

- 3. The HR Administrator collects all information, and transmits the appropriate documents to the appointing authority for approval or disapproval.** The HR Administrator mails notification to the employee or his/her designee stating if the leave sharing request is approved or denied. If the request is denied, the process is complete.
- 4. Process Approved Requests:**
 - a. Utilizing KHRIS:** Upon approval by the Appointing Authority, the HR Administrator will utilize the **ZLEAVE_SHARING** transaction code in KHRIS to create the leave sharing event. Agencies typically have one or two people set up as **Leave Sharing Approvers**. The **Leave Sharing Approver** must approve each request for leave sharing in the ESS/MSS worklist in KHRIS before the recipient can receive donations. This process also sets up the **Leave Sharing Bucket** for donated sick leave (06) or donated annual leave (07).

- b. **Not utilizing KHRIS:** If your agency is unable to utilize the leave sharing functionality in KHRIS, a copy of the application should be forwarded to the Personnel Cabinet. The HR Administrator will manually set up a quota bucket for either donated sick leave (06) or donated annual leave (07), and manually credit any donations using quota corrections. When performing quota corrections, you must select “Edit” and “Maintain Text” to make a note indicating the reason for the quota correction.

NOTE: Overlapping leave sharing events may cause problems with certain functionalities of the leave sharing program, and reporting in KHRIS. Please ensure that leave sharing events do not overlap dates. For example, if you did not set up the appropriate start date for the leave sharing event, you should request to have this incorrect event manually closed by the Personnel Cabinet before you create the correct event with an earlier start date. The leave sharing functionality in **ZLEAVE_SHARING** will allow you to amend a request to extend the date of the event longer, or to change the amount of leave requested. However, it will not let you change the begin date of the leave sharing event. **If you feel you have overlapped two events in error, please submit a business request for assistance in correcting this issue.**

5. Donor Process:

- a. The donor completes a donation form and submits to his/her HR Administrator.
- b. HR Administrator verifies the donor's leave balance for eligibility.
 - A minimum donation of 7.50 hours to a 37.50 hour per week employee and 8.0 hours to a 40.0 per week employee for sick leave or annual leave donations.
 - The donor must retain at least a 75-hour balance after the donation for either sick leave and annual leave donations.
 - For annual leave donations, the recipient can receive no more than 200 hours for each qualifying event.
- c. The donor's Appointing Authority must approve the form before it can be credited to the recipient.
 - If the donation is going to another agency, the donor's HR Admin should send a courtesy copy to the recipient's HR Administrator via secure email or fax.
 - The donor's HR Administrator utilizes the **ZLEAVE_SHARING** transaction code using the “Donate Leave” option to transfer the donated time.
 - File a copy of the donation form in a secure location at the donor's agency, not in the donor's personnel file.
 - If the donation is within the same agency, the HR Administrator processes the leave donation through the leave sharing functionality in KHRIS and files the paperwork in the recipient's file.

6. Receiving Leave Sharing Donations:

- a. Leave sharing donations received on paper/by email should be dated and numbered, or date/time stamped, so the order in which the donations are received can be tracked. This is necessary information so the HR Administrator can enter the donations into KHRIS in the appropriate order.
- b. Leave donations coming from outside agencies through the **ZLEAVE_SHARING** functionality in KHRIS, will be processed by that agency. Once the donation(s) have been processed and approved by the donating agency, these donations will transfer directly into the recipient's leave bucket for donated sick. **It is important for the leave sharing approver to approve donations in the work list in ESS/MSS in the correct order. Any unused leave donations remaining after the event has ended and is closed will be returned to donors in the reverse order they were received (last in/first returned).**
- c. Once the leave donation is processed and approved on the ESS/MSS work list by the Leave Sharing Approver, the KHRIS system will reduce the donor's sick or annual leave balance in KHRIS and will increase the recipient's donated leave balance, after time evaluation has been updated (every two hours).

Note: If your agency is unable to utilize the leave sharing functionality in KHRIS, the donor's HR Administrator should forward a copy of all leave donations to the Personnel Cabinet. The HR Administrator will also have to contact any outside agencies and share leave donations via secure email or fax. The HR Administrator for the donor will manually deduct leave from donors, and the HR Administrator for the recipient will manually credit to recipients by creating quota corrections in KHRIS. The HR Administrators will need to track the order of the donations manually. **Remember:** When performing quota corrections, you must select "Edit" and "Maintain Text" to make a note indicating the reason for the quota correction.

7. Sequence of leave time usage:

- a. Transfer all donated leave to the recipient at the time of the donation, not on a pay period basis, up to the amount requested. As the recipient accrues leave of their own, the HR Administrator will ensure the employee's own leave time is used first (this includes annual, sick, and comp leave). If the agency tries to enter donated leave before the employee exhausts their own leave, they will receive a time error stating that the employee's leave must be used before donated leave.
- b. Once all of the recipient's leave has been exhausted, they can then use donated time.
- c. Donated leave should be used in the order it is received.
- d. As the employee utilizes leave for the leave sharing qualifying condition, they will be paid as usual, reporting donated leave used. This is a paid leave code.
- e. The KHRIS absence code for the use of donated sick leave is **RSCK**. The KHRIS code for the use of donated annual leave is **RANL**.

8. Leave Sharing Report used to view/track leave sharing events:

- a. The HR Administrator may utilize the KHRIS transaction code **ZTM_LEAVE_SHARING** to execute a report showing a leave sharing event for an individual, or a group of individuals.
- b. This report will show the system-generated leave sharing request number, the PERNR and name of the recipient, the beginning and end date of the request, the type of leave requested, the

requested amount of leave, and all leave donations received, including the donor's name, their PERNR, and the amount donated by each.

- c. This report will also show if the event is open or closed and will indicate if leave donations have been returned.

9. The Recipient may retain the donated leave upon return to work, only if the recipient documents that leave will be needed for continuing treatment relating to the condition, which caused the individual's absence. For example, if the employee was absent due to surgery to remove a malignant tumor and returns to work, but will require periodic absences for radiation therapy, the excess donated leave may be retained for that purpose. However, the employee may not retain the excess leave to use for any unrelated condition.

10. Sequence of restoring unused leave to donors. When the recipient returns to work and the donated leave is no longer needed for the qualifying condition, excess leave shall be returned to the donors in the reverse order the donations were received.

- a. **For active employees**, The HR Administrator will use the **ZLEAVE_SHARING** transaction code to return the unused donations and close the event. The system will automatically return the unused donations in the reverse order (last in/first returned) and will close the leave sharing request.
- b. **If the donor has left state employment**, the returned hours will be manually credited to the inactive record for restoration to the donor if they are rehired in the future. Do this by manually creating a quota correction, PRIOR TO CLOSING the leave-sharing event in **ZLEAVE_SHARING**.
- c. *If your agency is unable to utilize the leave sharing functionality in KHRIS, this is a manual process using quota corrections to return unused leave to the donor(s). **Remember when performing quota corrections, you must always select "Edit" and "Maintain Text" to make a note indicating the reason for the quota correction.***

For detailed instructions on creating, amending, or closing a leave request, and crediting or returning a donation, see the Personnel Cabinet's HR Website, under the "Time" section, "Leave Sharing", "Instructions for Processing in KHRIS".