JOB AID

CONFIRMING PAID TIME OFF BALANCES AT FISCAL YEAR END

June 2016
TABLE OF CONTENTS

1. **OVERVIEW** ............................................................................................................................................. 3

2. **PREPARATION IN ADVANCE OF JULY 1, 2016** ..................................................................................... 5

3. **RESPONSIBILITIES FOR JULY 1 THROUGH OCTOBER 29, 2016** .......................................................... 6

4. **OCTOBER: TEMPLATE PROVIDED BY HRM** ................................................................................................. 6

5. **APPENDIX A: EXAMPLES** ....................................................................................................................... 7
1. OVERVIEW

INTRODUCTION
At the end of October, Northeastern will launch a university-wide electronic time tracking system for employees. In addition to simplifying and updating the way we report and track paid time off, it will allow employees and department managers to access time-off balances in real time. Please note, the Paid Time Off Policy is not changing.

SICK TIME
Please see Appendix A in Section 5 for examples and scenarios.

OFFICE SUPPORT, TECHNICAL AND SERVICE STAFF
All Office Support, Technical and Service staff will continue the current practice of accruing sick time monthly and may carry 150 days. Once an employee reaches 150 days, they do not accrue additional sick time until their sick balance drops below 150 days.

Personal time (three days), as well as 40 hours of family sick time, assuming sick time is available, will renew on July 1, 2016 and annually thereafter.

<table>
<thead>
<tr>
<th>SICK DAYS ACCRUED</th>
<th>DAYS CARRIED OVER TO NEXT YEAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 day for every full month of service</td>
<td>Up to 150 days</td>
</tr>
</tbody>
</table>

ADMINISTRATIVE AND PROFESSIONAL STAFF AND FULL-TIME FACULTY
Beginning July 1, 2016 and annually thereafter, all Administrative and Professional Staff, and Full-time Faculty will have their sick time balances renewed at the start of the fiscal year. Sick time allotments will no longer occur on the employee’s anniversary date.

From their sick time balances, employees may use up to three days of sick time as personal time and 40 hours as family sick time. On July 1, 2016, the three personal days and 40 hours of family sick time will be renewed. Personal time (three days), as well as 40 hours of family sick time, assuming sick time is available, will renew on July 1, 2016 and annually thereafter.
What’s happening with service anniversaries for Administrative and Professional Staff, and Full-time Faculty between July 1 and October 29, 2016?

<table>
<thead>
<tr>
<th>YEARS OF SERVICE</th>
<th>SICK DAYS ALLOTTED</th>
<th>DAYS RENEWED AT START OF FISCAL YEAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 2 years of completed service</td>
<td>22 days</td>
<td>Renewed to 22</td>
</tr>
<tr>
<td>Over 2 years of completed service and less than 7 years of service</td>
<td>44 Days</td>
<td>Renewed to 44</td>
</tr>
<tr>
<td>Over 7 years of completed service</td>
<td>66 days</td>
<td>Renewed to 66</td>
</tr>
</tbody>
</table>

When an employee’s two year service anniversary date or seven year service anniversary date occurs, they are awarded 22 additional sick days on their service anniversary date. (See above chart)

For this year only, when an anniversary occurs between July 1st and October 29th of 2016, consistent with the current practice, the Time Tracking Captains will need to add these additional days to the employee’s current sick time balance. Once the new Time Tracking System is implemented, this process will occur automatically.

**MANUAL ADJUSTMENTS**

<table>
<thead>
<tr>
<th>Service Anniversary Date</th>
<th>After October 29, 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>2nd year anniversary</td>
<td>22 days on 7/1 +22 days to balance on anniversary date</td>
</tr>
<tr>
<td>7th year anniversary</td>
<td>44 days on 7/1 +22 days to balance on anniversary date</td>
</tr>
</tbody>
</table>

**TIME TRACKING SYSTEM**

*Note: When the next renewal occurs on July 1, 2017, employees will again receive their full sick time renewal.*
2. PREPARATION IN ADVANCE OF JULY 1, 2016

OVERVIEW

Time Tracking Captains will need to ensure all employee paid time off balances are validated.

- For Administrative and Professional Staff, and Full-Time Faculty (12 month appointments) vacation balances will need to be confirmed for fiscal year 2016, consistent with current practices.
- For Office Support, Technical, and Service Staff, vacation and sick balances will need to be confirmed for fiscal year 2016, consistent with current practices.
- **NOTE:** Administrative and Professional staff, Full-Time Faculty (12 month appointments) and Office Support, Technical and Service staff, cannot carry over more vacation days than their maximum annual accrual.

TIMELINE

- Confirm FY16 balances
- Update sick time for FY17

Using the current method:
- Track time taken
- Update paid time off balances

NEXT STEPS

1. Validate sick and vacation balances for **Office Support, Technical, and Services Staff** in Fiscal Year 2016, i.e. from 7/1/2015 – 6/30/2016.

2. Validate vacation balances for **Administrative and Professional Staff, and Full-time Faculty (12 month appointments)** in Fiscal Year 2016, i.e. from 7/1/2015 – 6/30/2016.
   a) If units do not have complete information, Outlook calendars, email approvals, and any other time tracking tools can be used to determine time taken and balances.
   b) We have provided a tool to help you ensure accuracy of tracking the paid time taken and the paid time off balance for each employee. Please see the embedded excel file.

Secure Supplemental Time trackers.xlsx
c) Even if you have a current time tracking tool, you may want to refer to the instructions in the embedded file to ensure that tracking has been done in accordance with the Policy on Paid Time Off.

3. Once the balances have been established, it is recommended that all paid time off balances are agreed upon by the manager and employee to ensure accuracy. It is recommended you obtain sign-off for this step.

3. RESPONSIBILITIES FOR JULY 1 THROUGH OCTOBER 29, 2016

INTRODUCTION

Time Tracking Captains and their delegates will need to track paid time off balances from July 1st through October 29th to ensure correct balances are loaded into the new Time Tracking System.

NEXT STEPS

1. From July 1st to October 29th 2016 please continue to track paid time off balances using your current method. This will ensure you are ready to provide accurate balances to be loaded into the new Time Tracking System.

2. We recommend that all time off should be tracked as it is taken in the following categories: vacation time, sick time, family sick time, and personal time

4. OCTOBER: TEMPLATE PROVIDED BY HRM

Time Tracking Captains will need to populate the conversion template in October, prior to go-live (date TBD). The template will be provided by HRM so that paid time off balances can be loaded into the new Time Tracking System.

Things to be prepared for:

1. Converting all paid time off balances from days to hours (instructions to follow).
2. HRM will provide instructions and a template to collect this information.

Data that will be needed:

3. Vacation balances for FY16 and FY17. NOTE: Employees with accrual changes, due to a change in job grade or length of service, will need to be updated, consistent with the current practice.
4. Sick time, personal time, and family sick time taken and sick balance for each employee.
APPENDIX A: EXAMPLES

Please note, the examples below apply only to Administrative and Professional staff, and Full-Time Faculty. Office Support, Technical, and Service staff will continue to accrue sick time on a monthly basis.

EXAMPLE 1: Employees with a Hire Date in 2016

John Brown is an Administrative Professional with a hire date of April 2, 2016 and has 22 sick days:

- In June, John takes one personal day and two sick days. Therefore his new sick balance is 19 days.
- On July 1, 2016 John will be renewed to 22 days. His personal time will be renewed to three days and his family sick to time to 40 hours.

EXAMPLE 2.1: Employee’s two year service anniversary (before July 1, 2016)

Sue Jones is an Administrative Professional with a hire date of December 1, 2013:

- On December 1, 2015, Sue reached her 2nd year anniversary and was allotted 44 sick days.
- In April, Sue takes two personal days and three sick days. Therefore her new sick balance is 39 days.
- On July 1, 2016 Sue will be renewed to 44 days and does not have to wait for her next anniversary date. Her personal time will be renewed to three days and her family sick to time to 40 hours.
EXAMPLE 2.2: Employee’s two year service anniversary (after July 1, 2016)

Sally Smith is an Administrative Professional with a hire date of September 1, 2014:

- On September 1, 2015, Sally received 22 sick days on her 1 year anniversary.
- On July 1, 2016 sick time is renewed to 22 days as she has not yet reached her two year service anniversary date. His personal time will be renewed to three days and her family sick to time to 40 hours.
- In August, Sally takes one personal day and three sick days. Therefore her sick balance is 18 days.
- On September 1, Sally will be given the additional 22 sick days because she has met the second year milestone. Her new balance will be 40, which is calculated by adding her 22 days to the balance already available on her anniversary date (total sick days: 18 + 22 = 40).

EXAMPLE 3.1: Employee’s seven year service anniversary date (before July 1, 2016)

James Long is an Administrative Professional with a hire date of December 1, 2008:

- On December 1, 2015, James reached his seven year anniversary and was allotted 66 sick days.
- In April, James takes two personal days and three sick days. Therefore his new sick balance is 61 days.
- On July 1, 2016 James will be renewed to 66 days; his personal time will be renewed to three days and his family sick to time to 40 hours.
EXAMPLE 3.2: Employee’s seven year service anniversary (after July 1, 2016)

Jane Scott is an Administrative Professional with a hire date of October 1, 2009:

- On October 1, 2015, Jane received 44 sick days, when her balance was renewed, on her 6 year anniversary.
- On July 1, 2016 sick time is renewed to 44 days as she has not yet reached her seven year service anniversary date.
- In September Jane takes one personal day and three sick days. Therefore her sick balance is 40 days.
- On October 1, Jane will be given the additional 22 sick days because she has met the seven year milestone. Her new balance will be 62, which is calculated by adding her 22 days to the balance already available on her anniversary date (total sick days: 40 + 22 = 62).

EXAMPLE 4: Personal time taken before July 1, 2016

Tony Stark is an Administrative Professional with a hire date of October 1, 2013

- On October 1, 2015, Tony received 44 sick days, when his balance was renewed on his anniversary date. This balance included three personal days.
- In June 2016, Tony takes two personal days. Therefore his sick balance is 42 days inclusive of one remaining day of personal time.
- On July 1, 2016, Tony’s sick balance will be renewed to 44 days, which will renew his personal time balance to three days and 40 hours of family sick time.