Resolution regarding UWS Fringe Benefits Advisory Committee Recommendations for Leave Reporting

Rationale

The UWM University Committee has carefully monitored the legislative and news organizations review and criticism of the UW System unclassified employees use of sick leave reporting. It is our belief that steps must be taken to ensure that the faculty are provided an opportunity to accurately report their use of sick leave. It is also our belief that the present procedures for reporting sick leave are ambiguous, poorly documented, and cumbersome. Furthermore, little or no educational or training is provided to faculty on the importance and methods for properly reporting sick leave and annual leave. In addition, the University Committee is of the opinion that faculty should be held accountable and responsible for the accurate and timely reporting of sick leave. Therefore, we recommend that the UWM Faculty Senate approve this resolution.

UWM University Committee

John Johnson, Chair
Janet Lilly
Stephen Meyer
John Ndon
Erika Sander
Mark Schwartz
Cindy Walker

Whereas, Kevin Reilly, President of the University of Wisconsin System, in his March 16, 2007 letter to the various UW faculty governance groups asked for recommendations regarding UWS Fringe Benefits Advisory Committee Recommendations to improve Leave Reporting (February 28, 2007; see attached); and,

Whereas, the faculty at the University of Wisconsin-Milwaukee (UWM) are committed to ensuring the fair and accurate reporting use of sick leave, vacation and personal holidays; and,

Whereas, the faculty at the University of Wisconsin-Milwaukee recognize that retaining the present paid sick leave fringe benefit is critical to both faculty recruitment and retention efforts;

Therefore, be it resolved that the faculty of UWM support all recommendations provided in the revised sections I and II of the UWS Fringe Benefits Advisory Committee’s February 28, 2007 recommendations to improve leave reporting.
I. Administrative changes to address the LAB findings and recommendations

1. Revise the System-wide uniform leave reporting form (UW-1538) for reporting use of sick leave, vacation, and personal holidays.

   UW-1538 (see attached) consists of a report of the employee’s current leave balances and a space for the employee to report the next month’s leave usage. It is distributed to the institutions monthly by the UW Service Center. The institutions distribute the form electronically or manually to their employees.

   Form UW-1538 could be improved in several ways:
   a. Create two separate forms; one that provides the employee with a statement of his or her current balances, and one for reporting monthly leave usage.
   b. Provide instructions on how to complete the monthly leave report.
   c. Provide a way to indicate use of vacation or other leave in lieu of sick leave since many unclassified staff make this choice.
   d. Show days of the week as well as dates on the current month’s leave report which would make it easier to complete and reduce errors.
   e. Ask all institutions to post a copy of form UW-1538 on their websites for use by employees. This form could be fillable and could be emailed to the supervisor and then to the payroll office. (This would require electronic signature capability.)
   f. Provide reason codes for adjustments to prior leave balances allowing for more accurate auditing of reasons for balance changes that are not the result of the current month’s leave activity, such as error correction.

2. Create a system-wide deadline for submission of the current month’s leave report to the payroll office.

   Form UW-1538 indicates a deadline, approximately the 10th of the next month. Most institutions think that the 10th of the next month is a workable deadline.

3. Instructions on UW-1538 should clarify use of colleague coverage as defined under Unclassified Personnel Guideline 10.05. Supervisors should be cautioned to review reports of colleague coverage use for appropriateness.
4. Improve employee education regarding the importance of proper sick leave and annual leave reporting.

Examples of improved educational measures include:

   a. Revise and disseminate the UWSA PowerPoint presentation on sick leave to include more information about how to report leave usage.
   b. Revise and simplify policy guidelines on leave reporting (UPG#9 & 10) to make them more understandable for employees.
   c. Provide institutions with new employee orientation materials to help new employees understand the leave reporting requirements.
   d. Require each institution to issue an annual reminder on sick leave reporting and provide materials that the institution could use to do so.
   e. Offer specialized training to supervisors regarding the review of leave reports.

II. Policy changes to address the LAB findings and recommendations for discussion with governance groups

1. Require leave reporting on an hour-for-hour basis.

   It appears that several institutions have already taken this step. Form UW-1538 currently directs the employee to report in hours. The system described in UPG #10 may be unnecessarily cumbersome. Hour-for-hour reporting is consistent with the requirements of the state and federal Family and Medical Leave Acts.

2. Establish UWS System policy authorizing the institutions to implement the following:

   a. On an annual basis, reduce sick leave accrual if the employee has failed to report leave usage in one or more months during the year. Sick leave accrual for that year will be limited to the capped amount specified in s. 40.05(4)(bp)1., Wis. Stats. (i.e., 8.5 days for an annual appointee or 6.4 days for an academic year appointee). The reduction will apply both to the sick leave available to employees during their careers and to the sick leave balance certified at retirement.
   b. Include leave reporting requirements in the employment contract as a condition of employment.

3. Establish UWS System policy authorizing the institutions to implement any of the following:

   a. Permit supervisors to correct a leave report that appears to be inaccurate, with appropriate documentation and notification to the employee.
   b. Consider compliance with leave reporting as a factor in merit increases.
Attachment 2– UC Edits to February 28, 2007 FBAC Recommendations

University of Wisconsin System
Improvements in Leave Reporting
Recommendations of the UW System President’s Fringe Benefits Advisory Committee
February 28, 2007

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III. Policy Areas for Further Evaluation

The following are substantive policy issues which should be referred to the governance groups for further evaluation.

1. Evaluate the continued need for Colleague Coverage as a benefit to students when staff are absent from teaching responsibilities

2. Re-evaluate the policy that allows sick leave accrual during sabbatical leave

3. Evaluate alternative models for defined work schedules as it relates to sick leave and the statutory requirements for reporting sick leave.