

Calendar Processing (July 9th Excess Leave)

Purpose

To remove Excess Leave balances that were carried over from the previous year and are valid from January 10th until July 9th. For some leave plans, the leave is deleted and for other leave plans, the leave is converted to Sick leave and added to the employee's current balance.

Roles and Responsibilities

Sub-agency (i.e., College) responsibility
SSC responsibility

Steps by Participant and Milestone

Day 1

Time, Labor, and Absence Management (TLAM) Team

1. **Day 1: Calculate EX1 calendar**
 - 1.1. **Perform Task 10: Query - VX_AM_CALENDARS_NOT_FINALIZED**
 - 1.1.1. **Special parameter instructions for query**
 - 1.1.2. **Complete execute query**
 - 1.1.3. **Save and review/parse results**
 - 1.2. **Data returned from task 10?**
 - 1.3. **Perform Task 20: Cancel Calendars**
 - 1.4. **Perform Task 30: Process EX1 Calendars to Identify and Calculate Statistics**
 - 1.5. **Perform Task 40: Review EX1 Calendar Processing Statistics**
 - 1.6. **Perform Task 50: Query VX_AM_CALENDAR_GROUP_LEAVE_BAL**

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Verify results

- 2. Verify
- 2.1. Verify results

Day 3

- 3. Day 3: Finalize EX1 Calendar
- 3.1. Perform Task 10: Query-VX_AM_CALENDARS_NOT_FINALIZED
 - 3.1.1. Special parameter instructions for query
 - 3.1.2. Complete execute query
 - 3.1.3. Save and review/parse results
- 3.2. Data returned from Task 10?
- 3.3. Perform Task 20: Cancel Calendars
- 3.4. Perform Task 30: Process EX1 Calendars to Identify and Calculate Statistics
- 3.5. Perform Task 40: Review EX1 Calendar Processing Statistics
- 3.6. Task 60: Finalize the EX1 Calendar Processing
- 3.7. Perform Task 50: Query VX_AM_CALENDAR_GROUP_LEAVE_BAL

End

- 4. End

Requirements

Roles and Responsibilities

Approvals

SSC Line of Service

Version Control

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Procedure

Day 1

Time, Labor, and Absence Management (TLAM) Team

1. Day 1: Calculate EX1 calendar

1.1. Perform Task 10: Query - VX_AM_CALENDARS_NOT_FINALIZED

1.1.1. Special parameter instructions for query

- Start by 2:30 PM
- Query **VX_AM_CALENDARS_NOT_FINALIZED** should be run to ensure that all calendars have been finalized
- Follow instructions in TLAM [Query Execution](#)
 - Query Name – VX_AM_CALENDARS_NOT_FINALIZED
 - Query Description – Calendars Not Finalized
 - **HCM** Logon ID – individual
 - Update Parameters – Yes
- Box will display prompting for Key Calendar letter then “%”
- Enter % for all institutions
- Click OK
- Sample step
- [Go to step 1.1.2](#)

NOTE: Only one member needs to run this query, then post results for other team members to take action. This ensures that all data is pulled at same time and will be consistent among institutions.

1.1.2. Complete execute query

- Continue instructions in TLAM [Query Execution](#), beginning with step 1.4
- [Go to step 1.1.3](#)

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1.1.3. Save and review/parse results

- On View Log/Trace, select file with extension of .xlsx
- Select SAVE AS option
- Save file to "P" drive under Institution File Exchange 270 folder named as follows:
 - Name of query
 - Date in format MMDDYY
- Example: VX_AM_CALENDARS_NOT_FINALIZED_072224.xlsx
- Once the file has downloaded, select FILE the SAVE AS
- File will be viewed by **SSC TLAM**
- [Go to step 1.2](#)

1.2. Data returned from task 10?

- Data exists for **VX_AM_CALENDARS_NOT_FINALIZED** query?
 - If **YES**, [go to step 1.3](#)
 - If **NO**, [go to step 1.4](#)

1.3. Perform Task 20: Cancel Calendars

- Start by 2:35 PM
- This process cancels any calendars prior to running any new calendars
- Follow instructions in TLAM [Calculate Absence and Payroll](#)
 - Calendar Group IDs from **VX_AM_CALENDARS_NOT_FINALIZED** query
 - Action to be taken – Cancel
- [Go to step 1.4](#)

1.4. Perform Task 30: Process EX1 Calendars to Identify and Calculate Statistics

- Start by 3:00 PM
- Follow instructions in TLAM [Calculate Absence and Payroll](#)
 - Calendar Group ID (s)
 - Action to be taken – Identify & Calculate
- [Go to step 1.5](#)

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1.5. Perform Task 40: Review EX1 Calendar Processing Statistics

- Start by 3:30 PM
- Follow instructions in TLAM [Calendar Processing Statistics](#)
 - Calendar Group ID(s)
- [Go to step 1.6](#)

1.6. Perform Task 50: Query VX_AM_CALENDAR_GROUP_LEAVE_BAL

- Start by 4:00 PM
- Follow instructions in TLAM [Calendar Group Leave](#)
 - Calendar Group ID (s)
- [Go to step 2.1](#)

Verify results

2. Verify

2.1. Verify results

- Sub-agencies use Day 2 to review the above results so that the process may continue on Day 3. Sub-agencies will communicate any issues to the TLAM Team for resolution.
- [Go to step 3.1.1](#)

Day 3

3. Day 3: Finalize EX1 Calendar

3.1. Perform Task 10: Query-VX_AM_CALENDARS_NOT_FINALIZED

3.1.1. Special parameter instructions for query

- Start by 9:00 AM
- Query **VX_AM_CALENDARS_NOT_FINALIZED** should be run to ensure that all calendars have been finalized
- Follow instructions in TLAM [Query Execution](#)
 - Query Name – **VX_AM_CALENDARS_NOT_FINALIZED**
 - Query Description – Calendars Not Finalized
 - **HCM** Logon ID – individual
 - Update Parameters – Yes

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- Box will display prompting for Key Calendar letter then “%”
- Enter % for all institutions
- Click OK
- [Go to step 3.1.2](#)

3.1.2. Complete execute query

- Continue instructions in TLAM [Query Execution](#), beginning with step 1.4
- [Go to step 3.1.3](#)

3.1.3. Save and review/parse results

- On View Log/Trace, select file with extension of .xlsx
- Select SAVE AS option
- Save file to “P” drive under Institution File Exchange 270 folder named as follows:
 - Name of query
 - Date in format MMDDYY
- Example: VX_CALEDARS_NOT_FINALIZED_072224.xlsx
- Once the file has downloaded, select FILE then SAVE AS
- File will be viewed by SSC TLAM
- [Go to step 3.2](#)

3.2. Data returned from Task 10?

- Data exists for **VX_AM_CALEDARS_NOT_FINALIZED** query?
 - If **YES**, [go to step 3.3](#)
 - If **NO**, [go to step 3.4](#)

3.3. Perform Task 20: Cancel Calendars

- Start by 9:05 AM
- This process cancels any calendars prior to running any new calendars
- Follow instructions in TLAM [Calculate Absence and Payroll](#)
 - Calendar Group IDs from **VX_AM_CALEDARS_NOT_FINALIZED** query
 - Action to be taken – Cancel
- [Go to step 3.4](#)

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3.4. Perform Task 30: Process EX1 Calendars to Identify and Calculate Statistics

- Start by 9:30 AM
- Follow instructions in TLAM [Calculate Absence and Payroll](#)
 - Calendar Group ID(s)
 - Action to be taken – Identify & Calculate
- [Go to step 3.5](#)

NOTE: This process can only be run one institution at a time to ensure retro-trigger processes correctly. Coordination will be needed if multiple people are scheduled to complete this task. Only one person can actively process an individual calendar at a time, system wide.

3.5. Perform Task 40: Review EX1 Calendar Processing Statistics

- Start by 10:00 AM
- Follow instructions in TLAM [Calendar Processing Statistics](#)
 - Calendar Group ID(s)
- [Go to step 3.6](#)

3.6. Task 60: Finalize the EX1 Calendar Processing

- Start by 10:30 AM
- Follow instructions in TLAM [Calculate Absence and Payroll](#)
 - Calendar Group ID(s)
 - Action to be taken – Finalize
- [Go to step 3.7](#)

3.7. Perform Task 50: Query VX_AM_CALENDAR_GROUP_LEAVE_BAL

- Start by 11:00 AM
- Follow instructions in TLAM [Calendar Group Leave Bal](#)
 - Calendar Group ID (s)
- [Go to step 4](#)

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End

4. End

- The process is complete.

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Requirements

Certain leave plans allow employees to carry an Excess Leave Balance from January 10th until July 9th. As of July 9th, any Excess Leave balances remaining must be removed from the excess leave plans. For some leave plans, the leave is deleted and for other leave plans the leave is converted to Sick Leave and added to the employee's current balance. The following chart illustrates the July 9 Excess Leave Process:

July 9 th EXCESS LEAVE PROCESS		
Entitlement Description	Excess Leave Plan	Action
Faculty		
Professional and Faculty with plan created after 1/1/2007	Excess leave plan 48ALVPROFACA	Eliminate excess leave
Professional and Faculty with VSDP and annual leave plan created prior to 1/1/12007	Excess leave plan 37ALVPROFACP	Eliminate excess leave
Professional and Faculty with ORP or TRAD and annual leave plan created prior to 1/1/12007	Excess leave plan 28ALVPROFACP	Move excess leave to 31Traditional Sick
Classified Staff		
Classified Staff	Excess leave plan 61ANCLSLV	Eliminate excess leave
President, Executive Vice President, Vice President, Provost, Faculty-Rank Member of Chancellor's Cabinet		
Chancellors Cabinet VSDP over 15 years of service	Excess leave plan 35GFANLLVOPO	Eliminate excess leave

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Chancellors Cabinet ORP over 15 years of service	Excess leave plan 64GFANLLVOPO	Move excess leave to 31Traditional Sick
Chancellors Cabinet ORP under 15 years of service	Excess leave plan 33GAECORPU15	Move excess leave to 31Traditional Sick
Chancellors Cabinet VSDP under 15 years of service	Excess leave plan 34GFANLLVUPV	Eliminate excess leave

A special Excess Leave Calendar Group is used to perform the above processes. The Calendar Group follows our standard naming convention for July 9 calendars and contains the suffix EX1. For example, the System Office Excess Leave Calendar for 2024 is X240709EX1.

In order to ensure Excess Leave is managed properly:

- The Excess Leave Calendar Group must be processed after the July 9th TC1 and EN1 Calendar Groups are Finalized
- The Excess Leave Calendar Group must be Finalized before the July 24th TC1 Calendar Group is Finalized

Roles and Responsibilities

In general, Time, Labor, and Absence Management processes entail responsibilities on the behalf of both institutions and SSC.

- Sub-Agency Responsibilities
 - Review results from calculating the EX1 Calendar Group
 - Perform any applicable Leave Administrator Processes such as: adjust employee leave balances, void approved leave, employee self-service interface support, monitor employee leave balances, manual load of excess leave, mid-year calendar processing, new hire leave management, and employee termination leave balances

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- SSC Responsibilities
 - Run the Calendar Processing queries in the order and by the time frames delineated within the published Activities Calendar and post for institution review
 - Publish schedule for all institutions for a 2-month rolling period
 - Cancel, Identify/Calculate, and Finalize calendars across all institutions to resolve and finalize all approved leave requests to update leave balances
 - Submit tickets and communicate all issues adversely impacting calendars and accuracy of leave balances within four (4) working hours of generation
 - Communicate Calendar Processing issues, as outlined in the Standard Operating Procedures (SOP), to the appropriate liaisons before issue(s) impact the employee

Approvals

Effective Date – April 28, 2020

Approved by – Operations Manager, Senior Leader, Process Council

SSC Line of Service

Time, Labor, and Absence Management (TLAM)

Version Control

Version 1.0:

- **Author/Editor** – Kara Stewart
- **Change** – First published version
- **Approvals** – Operations Manager, Senior Leader, Process Council
- **Date** – 04/28/2020

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Version 2.0:

- **Author/Editor** – Donna Smith
- **Change** – Edits to align map with procedure
- **Approvals** – Michele Johnson
- **Date** – 01/12/2021

Version 3.0:

- **Author/Editor** – Michele Johnson
- **Change** – Incorporated edits from TLAM
- **Approvals** – Service Line Leadership
- **Date** – 5/22/2025