CALM: Centralized Accrued Leave Management Project

Overview and Update as of November 2011
Presentation Topics

- CALM Project
  - Overview
  - Benefits and Impact for Managers and Staff
  - Revised Absence Policies
  - What Managers Need to Do Now!
  - Resources
  - Absence Management Module
  - Upcoming Activities
  - Human Resources (HR) and Dean of Faculty (DoF) Contacts
CALM Overview

• Centralized Accrued Leave Management project, started in 2009
• SUMAR initiative and University priority (refer to www.princeton.edu/sumar for more information)
• Policy Sponsors
  – Carolyn Ainslie, Vice President for Finance and Treasurer
  – David Dobkin, Dean of Faculty
  – Lianne Sullivan-Crowley, Vice President for Human Resources
CALM Overview

- Project Goals
  - Have accurate cost estimate of University’s paid time liability for financial stewardship, planning, and audited financial statements
  - Track absences and balances efficiently
  - Provide managers and staff with better tools to record and plan time off
  - Develop and implement absence policies that are consistently, fairly, and equitably applied across campus
What Are the Benefits of CALM for Managers?

- Efficient tracking and reporting of staff absences
- Enhanced ability to report on and plan for time off in the office
- Updated absence policies and procedures to ensure consistent, fair, and equitable administration
- Known financial liability for vacation payouts upon retirement, termination, or start of unpaid leaves of absence
What Are the Benefits of CALM for Staff?

- Clearer and simplified policies
- Ability to view absence balances online quickly and easily through HR Self Service
- Easy-to-use tool to track time out of office
- Vacation eligibility, approvals, and payouts handled with fairness, equity, and consistency
Who Does CALM Impact?

• HR benefits-eligible staff
  - Union employees should refer to their respective contracts for more information at www.princeton.edu/hr/progserv/lr/unions

• DoF academic professionals (librarians, specialists, researchers)
What Are the CALM Policy Changes?

- Highlights of Sick Day Policy
  - Renamed, formerly “Sporadic Absences Because of Illness or Injury
  - Probationary period provision eliminated for biweekly-paid new hires
  - Clarifies proration of time allotted for part-time employees

- Highlights of Personal Day Policy
  - New policy that incorporates two optional holidays formerly in Holiday policy
  - Clarifies proration of time allotted for part-time employees
What Are the CALM Policy Changes?

• Highlights of Vacation Policy
  – Vacation time can be used as accrued
  – 48-day accrual maximum
  – Biweekly-paid employees are eligible to accrue up to 24 days per fiscal year; incorporates time off for compelling reasons
  – Vacation accrual begins as of start date for newly hired biweekly-paid employees
What Are the CALM Policy Changes?

• Highlights of Vacation Policy
  – How vacation time is earned for partial month worked is clarified.
  – New hires can request time off for pre-planned vacation.
  – Vacation should not be scheduled during termination notice period (normally two weeks or one month based on one’s payroll schedule).
  – Vacation balance documentation/approval process is clarified for employees transferring to another department.
  – Manager and staff responsibility of tracking vacation time is emphasized.
What Are the CALM Policy Changes?

• Highlights of Vacation Policy
  – Provides clarification regarding DoF academic professionals (librarians, specialists, researchers)

• Accrued vacation should be used by academic professionals hired on term appointments before the final end date if sufficient funding for vacation payout is unavailable from the grant/contract supporting their salary.

• For academic professionals hired on renewable appointments, vacation time may be accrued and carried over in accordance with the current policy, but all accruals should be used prior to the final end date.
What Remains the Same in CALM Absence Policies?

• Time off requires managerial approval.
• 24 vacation days for monthly-paid staff
• Vacation payout of up to 30 days at time of termination, retirement, or start of an unpaid leave of absence
• Number of sick days and 8-day carryover up to 16 days
What Does CALM Require Managers to Do?

• Begin or continue to collect and record current absence balances for each staff member
  – Identify vacation balances over 48 days
  – If absence balances are not easily determined, work with staff members to arrive at a reasonable number using time collection reports, calendars, attendance sheets, other records.
  – Address vacation balances of more than 48 days within guidelines by July 1, 2012
What Does CALM Require Managers to Do?

• Going forward
  – Accurately record and track staff time out of the office
  – Help staff utilize vacation time that exceeds 48 days by July 1, 2012
  – Align departmental absence management practices with policies
  – Contact your senior HR manager, employee relations specialist, HR generalist, or DoF contact for assistance and guidance
What Are My CALM Resources?

- Web page: www.princeton.edu/progserv/er/calm
- FY2012 Attendance and Tracking Form: www.princeton.edu/hr/working/schedules/attendance
- Time Off Calculator Tools: www.princeton.edu/progserv/er/calm
- Information Warehouse Department Absence Balance Collection Template: http://web.princeton.edu/sites/iw
- PeopleSoft absence management module roll out beginning July 1, 2012 (more information forthcoming)
- Revised vacation, sick, and personal days policies (effective July 1, 2012): www.princeton.edu/progserv/er/calm
- Frequently Asked Questions: www.princeton.edu/hr/faq/calm
Absence Management Module

• New PeopleSoft absence management module will be available through HR Self Service.
• Roll out to departments will be scheduled from July 2012 through December 2012.
• Module will accrue and track time off and maintain absence balances.
• Biweekly-paid employees will continue to enter time in TCS. Data will flow directly into PeopleSoft.
• Monthly-paid employees will enter time off through HR Self Service.
CALM Upcoming Activities

• Fall 2011: Departments prepare for new policies
  – Establish or confirm tracking processes
  – Identify or confirm current balances
  – Revised absence policies (effective July 1, 2012) posted on the HR website

• November 2011: PeopleSoft absence management module implementation project begins

• Spring 2012: Departments begin to collect absence balances for upload into PeopleSoft

• July 1-December 31, 2012: Policies go into effect July 1, 2012; absence management module rollout to departments by year end.
## Questions?

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