

# Leave of Absence User Guide

## Teachers Retirement Association



**Phase:** 1.0

**Revision:** August 18, 2016

*The latest version of this document can be found on the TRA website. If printed, ensure you have an up-to-date version.*

**Table of Contents**

Purpose..... 3

Audience ..... 3

Leaves of Absence..... 4

    Create a leave of absence report ..... 4

    Correct a Submitted Leave Request ..... 10

    Cancel a Leave Request..... 13

Sabbatical Leaves of Absence ..... 16

    Create a leave of absence report..... 16

    Correct a Submitted Leave Request ..... 23

    Cancel a Leave Request..... 24

Part-Time Teacher Program Application..... 25

    Create a PTTTP application ..... 25

    Cancel a Part-Time Teacher Program Application ..... 33

## **Purpose**

This document describes how to create, correct, and cancel leaves of absence, including sabbatical leaves and Part-Time Teacher Program applications.

## **Audience**

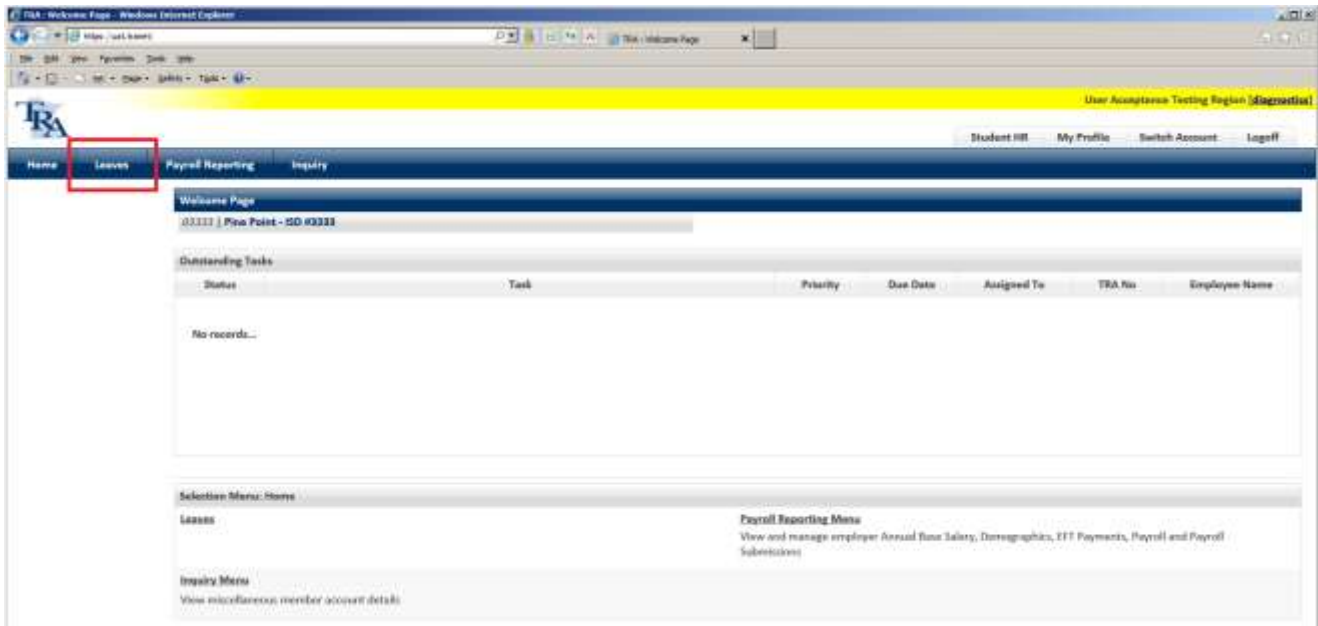
The primary audience for this document are staff members responsible for entering leaves in the TRA system.

# Leaves of Absence

All leaves of absence are reported to TRA online through the website.

## Create a leave of absence report

Step 1. Click Leaves on the main menu.



Step 2. Click the New button.



**Step 3. Select the type of leave from the drop-down box.**

Click **Ok**.

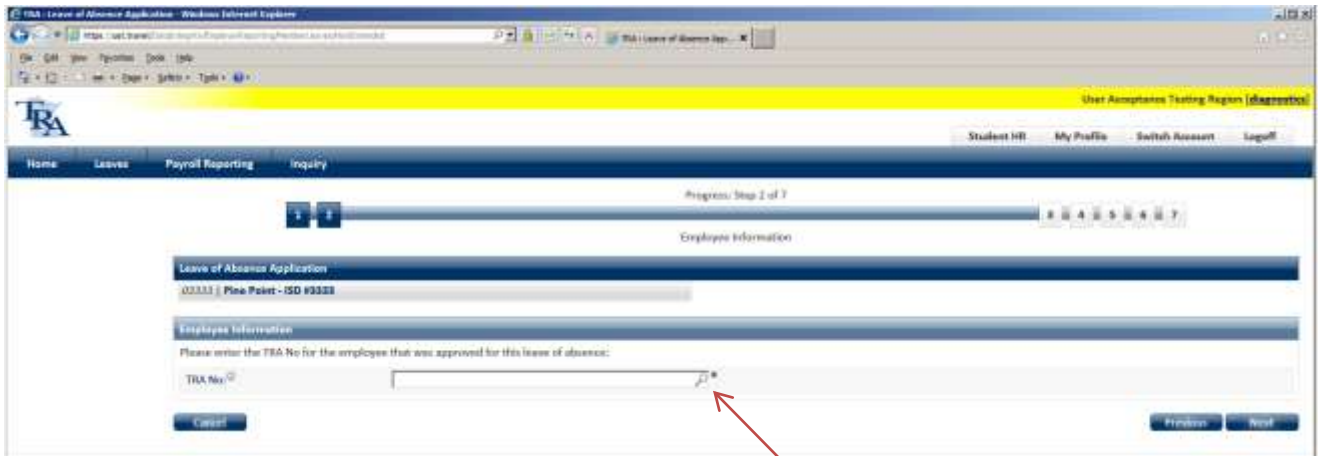
**Step 4. The Leave of Absence wizard is displayed.**

The wizard explains the requirements that must be met for the member to be eligible to purchase service credit for the period of time they are on leave.

Click the **Next** button.

**Note:** You can change the leave type on this screen.

**Step 5. Enter the TRA number of the employee granted the leave.**



Click **Next**.

*Note:* If you don't know the employee's TRA number, click the magnifying glass icon to search by name.

Tip! When the TRA No. field loses focus -- when you click anywhere on the screen -- the employee's name is displayed. This enables you to verify you have the right person before proceeding.

**Step 6. Verify the employee has the right to full reinstatement.**

Click the checkbox to certify that the employee retains the right to reinstatement both during and after the leave period.



Click **Next**.

### Step 7. Enter dates for leave.

Enter the date the leave

- was granted
- began
- ends

TRA - Leave of Absence Application - Student Services Explorer

Progress Step 3 of 7

Leave Period

Leave of Absence Application  
03133 | Pine Point - ISO 45333

Leave Period

All leave of absence applications must be submitted by fiscal year (July 1 - June 30), except for Military Leaves.

Example (Non-Military Leave):  
If a Non-Military Leave of Absence is granted for the time period of March 21, 2015 through November 21, 2015, a leave of absence application must be submitted for each fiscal year of the time period as follows:  
- Application for fiscal year 2015 with a Leave Begin Date = 03/21/2015 and Leave End Date = 06/30/2015  
- Application for fiscal year 2016 with a Leave Begin Date = 07/01/2015 and Leave End Date = 11/21/2015

Example (Military Leave):  
If a Military Leave of Absence is granted for the time period of March 21, 2015 through November 21, 2015, only one leave of absence application needs to be submitted for the time period as follows:  
- Application for fiscal year 2015 with a Leave Begin Date of 03/21/2015 and Leave End Date of 11/21/2015

Please enter the following leave dates.

Leave Granted Date:

Leave Begin Date:

Leave End Date:

Cancel Previous Next

Note that leaves cannot cross fiscal years.

Click **Next**.

### Step 8. Certify the leave information.

Click the checkbox to certify that the leave information you entered is accurate.

TRA - Leave of Absence Application - Student Services Explorer

Progress Step 5 of 7

Application Certification

Leave of Absence Application  
03133 | Pine Point - ISO 45333

Leave Period Information Certification

I certify that all of the information provided on this form is in accordance with the terms agreed upon by the granting authority on the leave granted date.

Name of Authorized Administrative Official:  Keith, Theresa

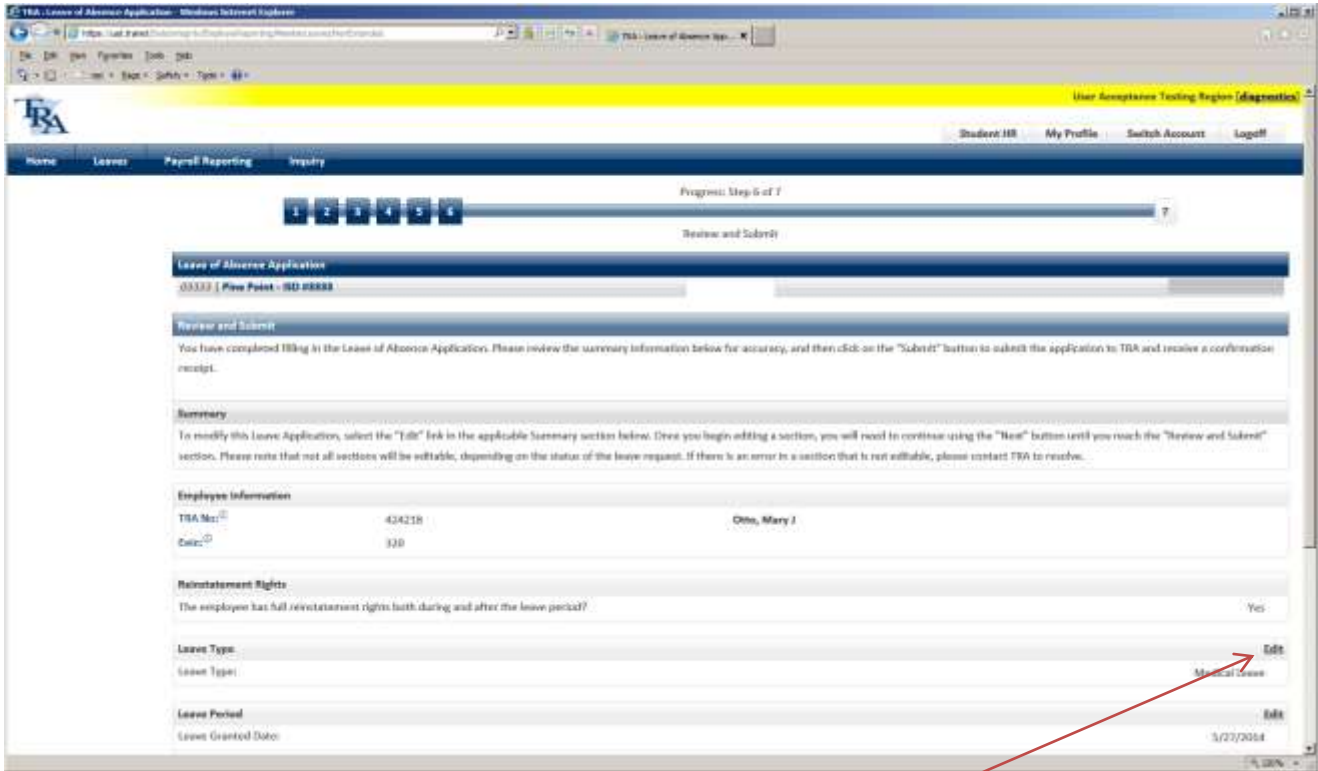
Date of Certification and Submission:  6/4/2014

Cancel Previous Next

Click **Next**.

**Step 9. Review the information you entered.**

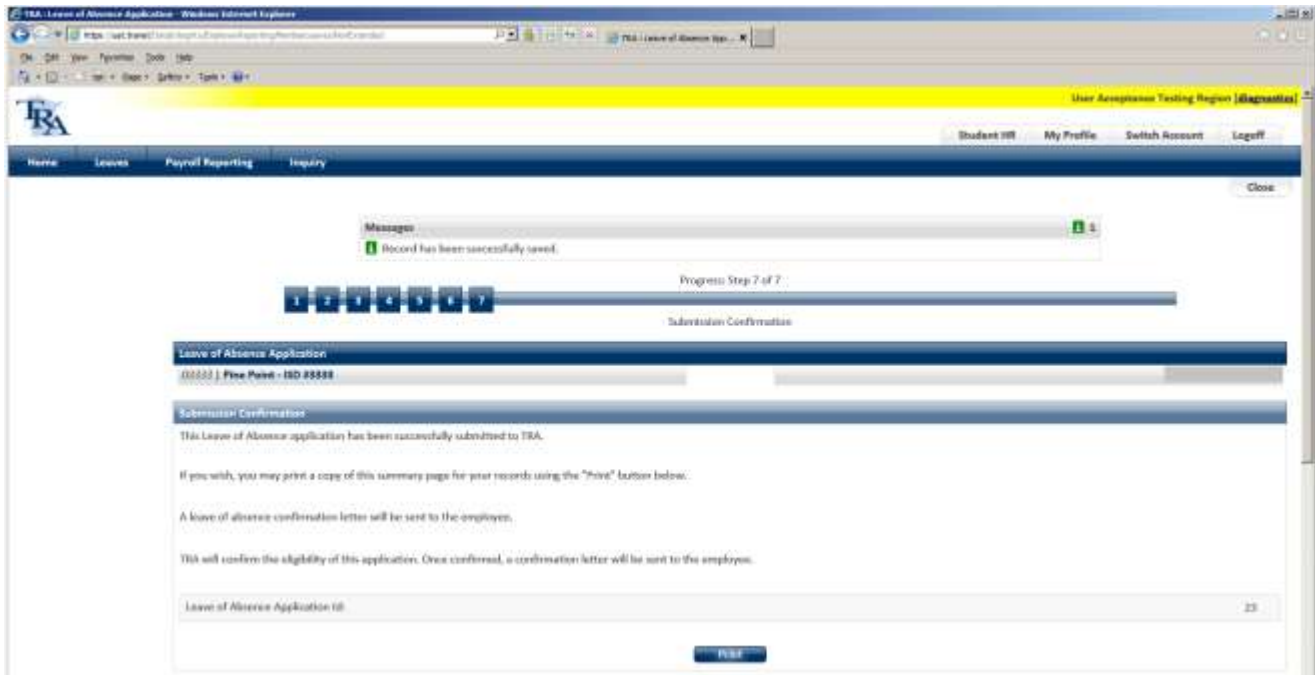
A summary of the information is displayed for your review.



To correct or update any information, click the appropriate **Edit** link, or click the Previous button.

Click the **Submit** button (at the bottom of the screen) when you are certain the information is correct.



**Step 10. Print the confirmation page.**

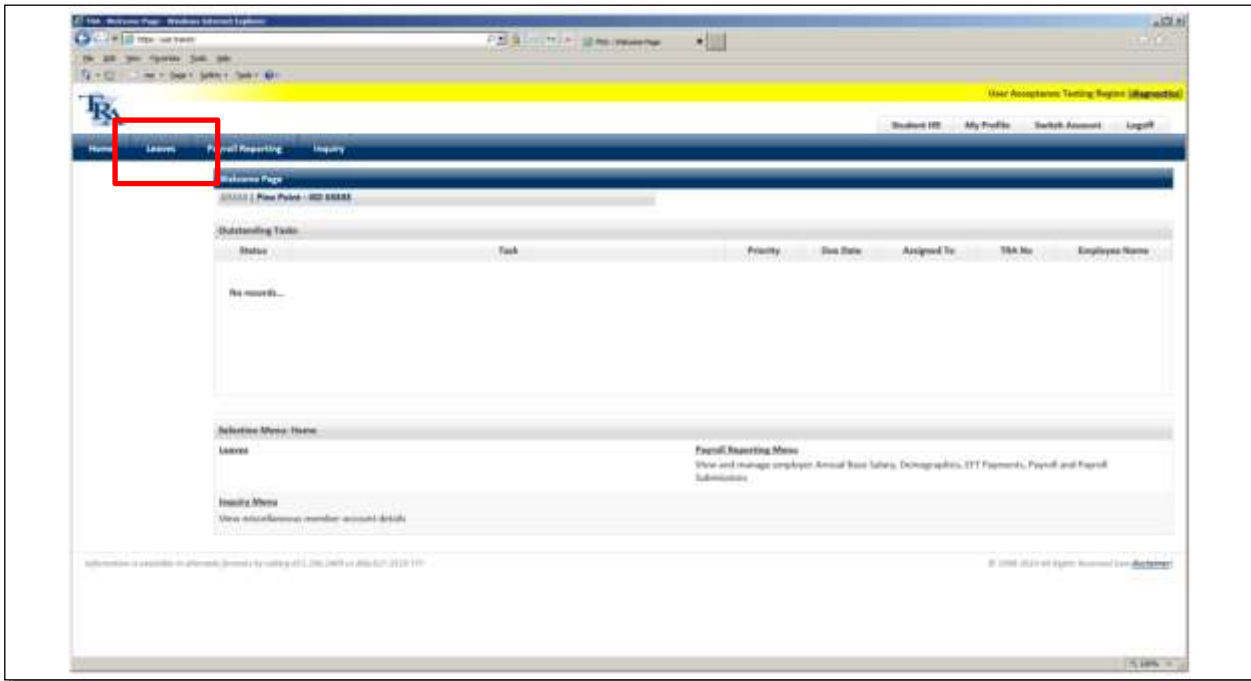
A Submission Confirmation page is displayed.

The Print button enables you to print a copy for your records.

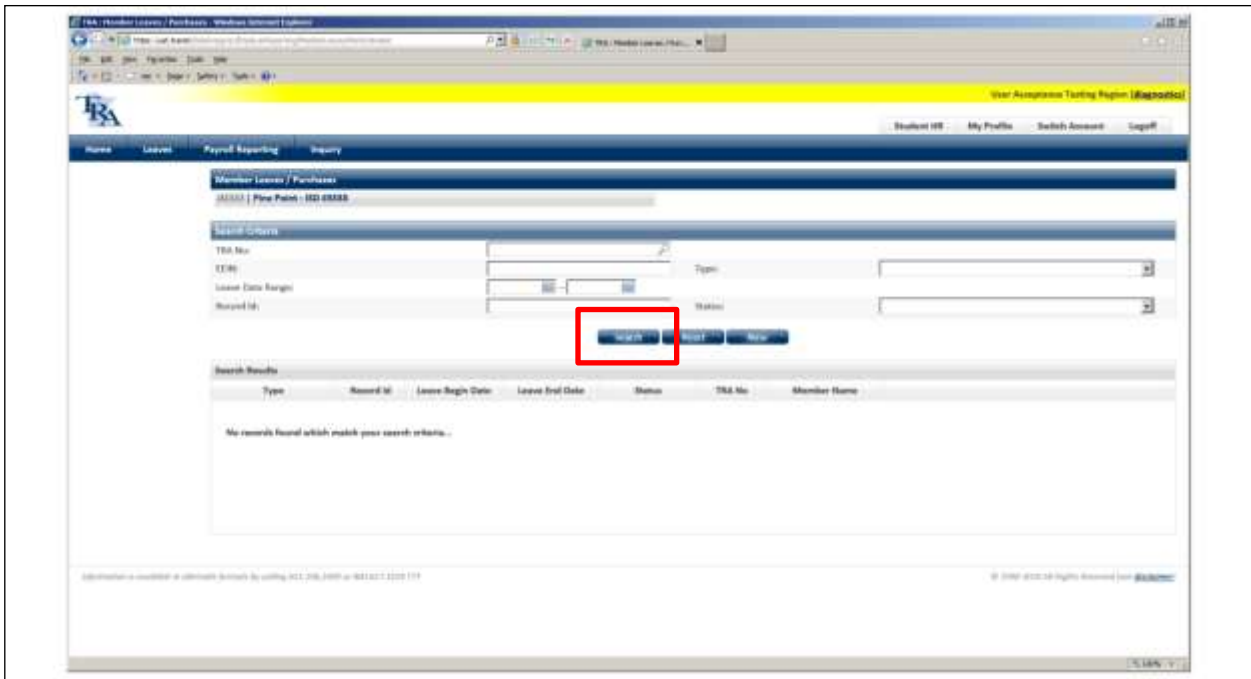
Click the **Close** button.

## Correct a Submitted Leave Request

Step 1. Click Leaves on the main menu.



Step 2. Click the Search button.



Remember, you can always narrow the search by entering search criteria, such as Type.

Type:

Status:

- Extended Leave
- Family Leave
- Legislative Leave
- Medical Leave
- Military Leave
- Other Leave
- Parental Leave
- Part-Time Teacher Program
- Sabbatical Leave
- Strike Period
- Union Leave

### Step 3. Select the leave from the search results

TRA Member Leaves / Purchases - Windows Internet Explorer

TRA - Member Leaves / Purchases

User Acceptance Testing Region (diagnostic)

Student HR My Profile Switch Account Logout

Home Leaves Payroll Reporting Inquiry

Member Leaves / Purchases

03333 | Row Point - ID H2333

Search Criteria

TRA No:

COIN:

Leave Date Range:  -

Record Id:

Type:

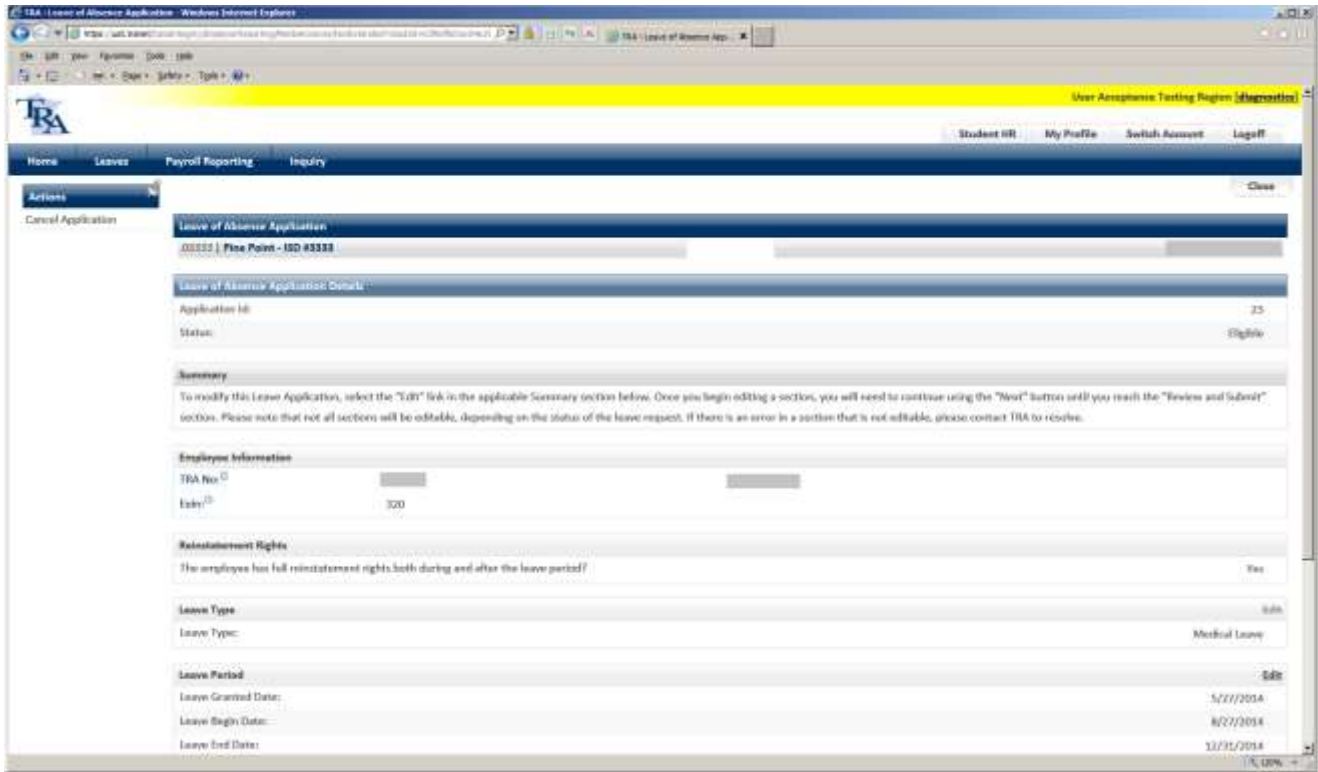
Status:

Search Results

Type	Record Id	Leave Begin Date	Leave End Date	Status	TRA No	Member Name
Medical Leave	22	6/27/2014	12/31/2014	Eligible		

Click the **Record Id** link.

**Step 4. Make the corrections.**



Note the instructions in the Summary.

Click the **Edit** link in the appropriate section.

Enter the changes.

Click the **Next** button.

**Step 5. Resubmit the leave.**

Click the **Submit** button at the bottom of the screen.

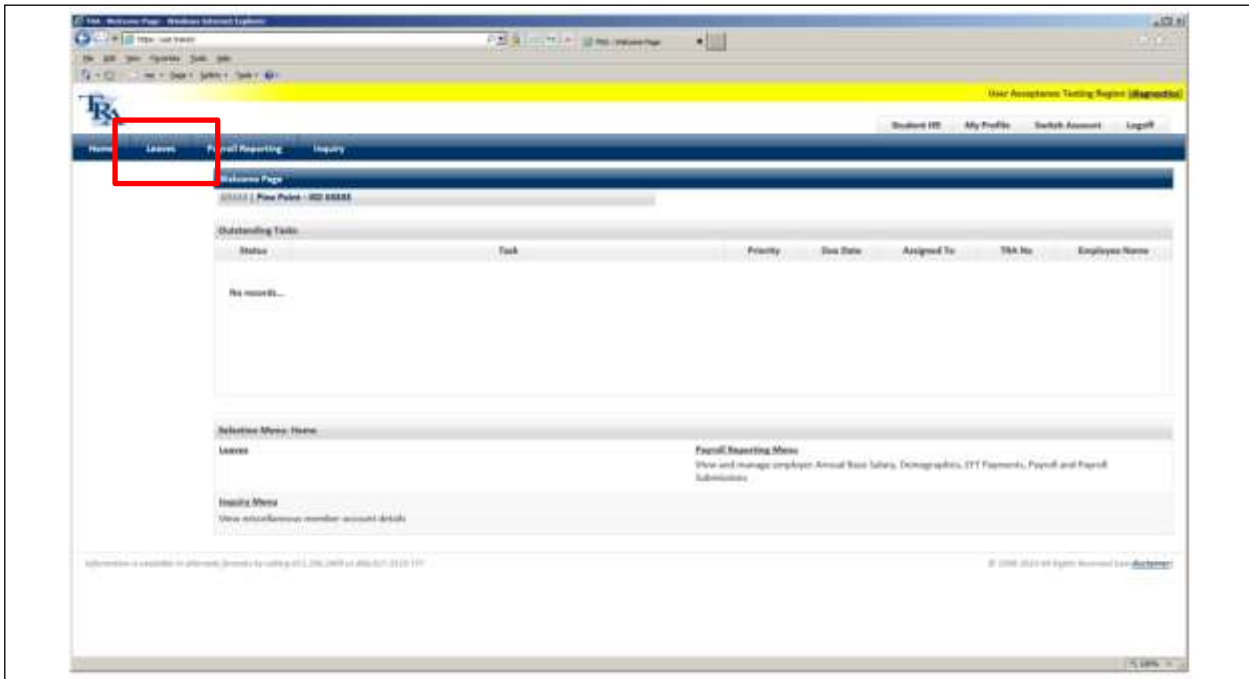
**Step 6. Review the Submission Confirmation page.**

Review and verify the information is correct. Print the leave request if necessary.

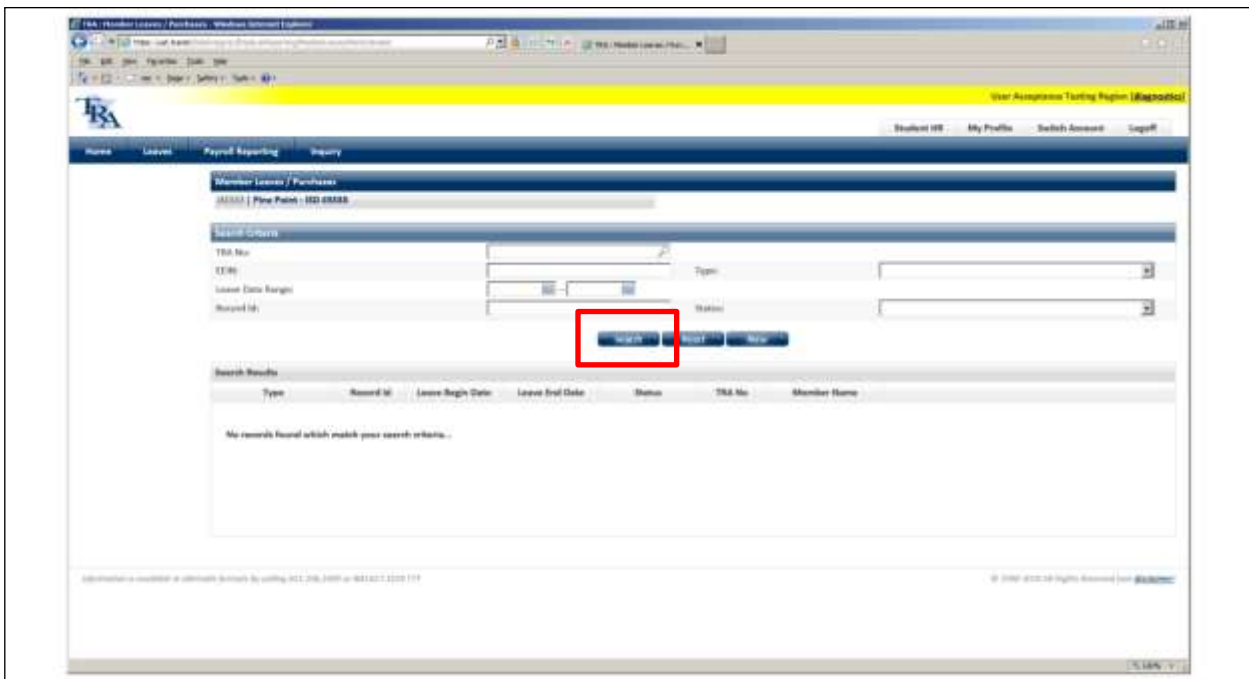
Click the **Close** button.

## Cancel a Leave Request

Step 1. Click Leaves on the main menu.



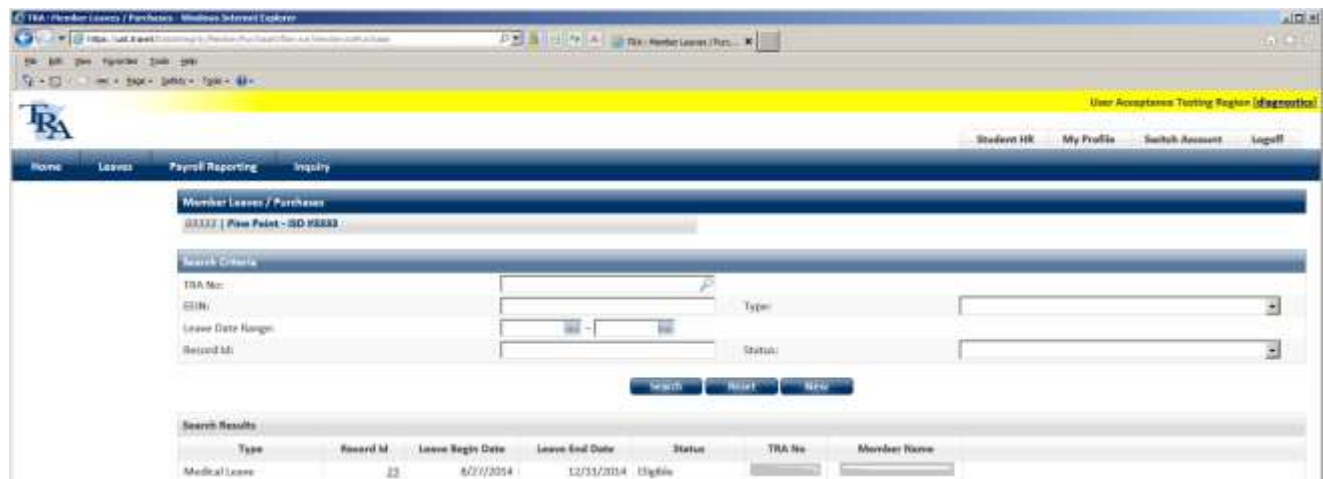
Step 2. Click the Search button.



Remember, you can always narrow the search by entering search criteria, such as Type.



**Step 3. Select the leave from the search results**



Click the **Record Id** link.

*Note: You cannot cancel leave requests if the Status is “Pending payment.”*

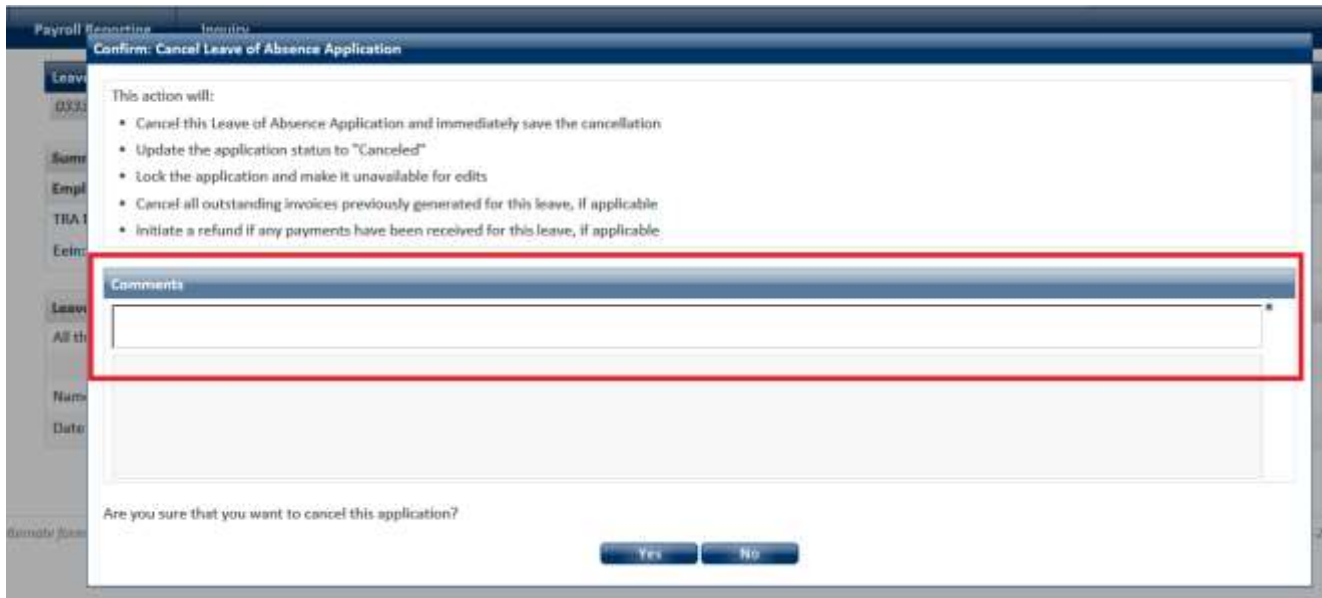
**Step 4. Cancel the request**

With the appropriate application displayed, under Actions, click **Cancel Application**.



**Step 5. Enter a comment.**

Explain why this application was cancelled. This is a mandatory field.



Payroll Reporting    Inquiry

**Confirm: Cancel Leave of Absence Application**

This action will:

- Cancel this Leave of Absence Application and immediately save the cancellation
- Update the application status to "Canceled"
- Lock the application and make it unavailable for edits
- Cancel all outstanding invoices previously generated for this leave, if applicable
- Initiate a refund if any payments have been received for this leave, if applicable

**Comments**

Are you sure that you want to cancel this application?

Yes    No

**Step 6. Click Yes**

The leave request is deleted. There is no confirmation.

## Sabbatical Leaves of Absence

Sabbatical leaves of absence are reported in the same manner as other leaves.

All leaves of absence are reported to TRA online through the website.

### Create a leave of absence report

**Step 1.** Click Leaves on the main menu.

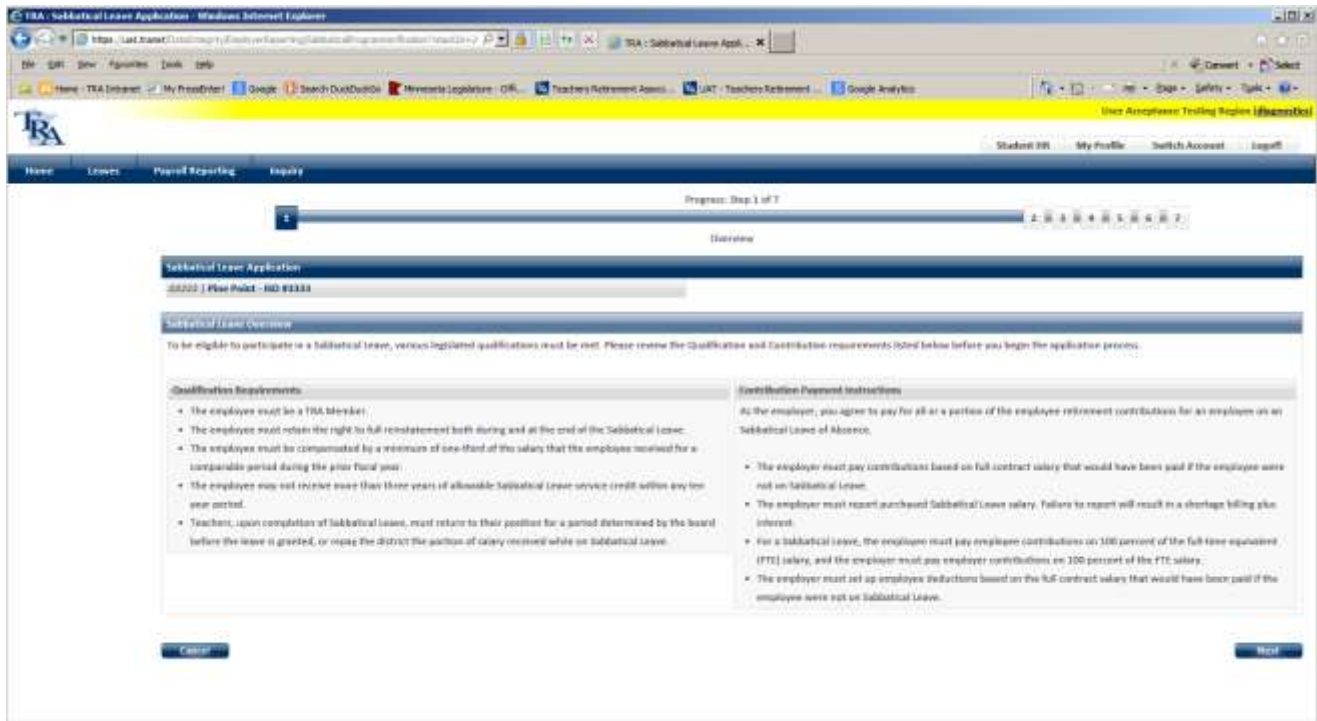
**Step 2.** Click the New button.

**Step 3.** Select Sabbatical Leave from the drop-down box.

The screenshot shows a software window titled "Create New Application / Purchase". Inside the window, there is a text box with the prompt "Please select an Application/Purchase Type:". Below this text box are two buttons: "Ok" and "Cancel". To the right of the text box, a drop-down menu is open, displaying a list of leave types. The list includes: Extended Leave, Family Leave, Legislative Leave, Medical Leave, Military Leave, Other Leave, Parental Leave, Part-Time Teacher Program, Sabbatical Leave (which is highlighted with a red rectangular box), Strike Period, and Union Leave. The background of the window shows a form with several input fields, including one labeled "Type:" and another labeled "Status:".

Click **Ok**.



**Step 4. The Leave of Absence wizard is displayed.**

The wizard explains the requirements that must be met.

Click the **Next** button.

**Step 5. Enter the TRA number of the employee granted the leave.**

Click **Next**.

*Note: If you don't know the employee's TRA number, click the magnifying glass icon to search by name.*

Tip! When the TRA No. field loses focus -- when you click anywhere on the screen -- the employee's name is displayed. This enables you to verify you have the right person before proceeding.

**Step 6. Verify the employee has the right to full reinstatement.**

Click the checkbox to certify that the employee retains the right to reinstatement both during and after the leave period.

Click **Next**.

**Step 7. Enter dates for leave.**

Enter the date the leave

- was granted
- began
- ends

Note that leaves cannot cross fiscal years.

Click **Next**.

**Step 8. Enter employee salary.**

Provide the employee's earnings from the year prior to the sabbatical year.

**Note:** The dollar sign and comma are not necessary. They are added automatically.

All fields are mandatory. Enter a zero (0) if there was no salary.

**Step 9. Enter sabbatical year salary.**

In the right-most grid, enter earnings projected during the sabbatical year.

For example, if the employee's contract salary is \$60,000, and the individual is taking a 50% sabbatical, the projected teaching salary is \$32,500 (half of the base teaching contract).

Again, all fields are mandatory. Enter a zero (0) if there is no salary.

Click **Next**.

**Step 10. Enter projected salary**

**Projected Sabbatical Earnings**

Sabbatical participants must be compensated for an amount of at least 1/3 of the salary that the employee received for a comparable period during the prior fiscal year.

Comparable Prior Year Period Earnings:	\$ 71,500.00
Minimum compensation (1/3 of Comparable Prior Year Period Earnings):	\$ 23,833.33
Sabbatical Year Period Teaching Contract Salary:	\$ 60,000.00

Under the conditions of the sabbatical leave, Projected Earned Salary for this teacher will be:

[Cancel](#) [Previous](#) [Next](#)

Enter the amount of salary the employee will be paid during their time on sabbatical leave.

For example, if the employee is taking a 50% sabbatical, their projected earnings are \$32,500, or 50% of the base teaching salary.

Click **Next**.

### Step 11. Review contributions and deductions.

The screen shows the amount of salary the employee is eligible to purchase from TRA.

It also shows the employee and employer contributions payable, based on the purchasable salary amount.

The screenshot displays the 'Substantial Leave Application' interface. The main content area is titled 'Deductions and Contributions'. It shows a table with the following data:

Category	Amount
Substantial Year Period Teaching Contract Salary	\$ 40,000.00
= Projected Earned Salary during Substantial Leave	\$ 32,500.00
= Projected Purchasable Salary during Substantial Leave	\$ 27,582.00
Employee Deduction Rate	7.5 %
Projected Employee Deduction Amount for Purchasable Salary	\$ 2,067.50
Employer Contribution Rate	7.5 %
Projected Employer Contribution Amount for Purchasable Salary	\$ 2,067.50

Below the table, there are formulas for calculating the deduction schedule:

- Employer's Remaining Contributions for the fiscal year = (Projected Purchasable Salary for fiscal year \* Employer Contribution Rate for fiscal year) - Actual Employer's Contributions submitted via Payroll in fiscal year
- Employee's Remaining Deductions for the fiscal year = (Projected Purchasable Salary for fiscal year \* Employee Deduction Rate for fiscal year) - Actual Employee's Deductions submitted via Payroll in fiscal year
- Employer's Remaining Contributions per Pay Period for the fiscal year = (Employer's Remaining Contributions for the fiscal year / Number of Remaining Pay Periods over which contributions will be taken in the fiscal year)
- Employee's Remaining Deductions per Pay Period for the fiscal year = (Employee's Remaining Deductions for the fiscal year / Number of Remaining Pay Periods over which deductions will be taken in the fiscal year)

At the bottom of the screen is an explanation of how to calculate the per pay period employee and employer deductions to remit with your payroll.

Basically, you take the employee and employer contributions due on the purchasable salary and divide them over the remaining pay period for the school year or through June 30, whichever is later.

Click **Next**.

**Step 12. Certify the leave information.**

Click the check box to certify that the information has been authorized by your organization.

Click **Next**.

**Step 13. Review the information you entered.**

A summary of the information is displayed for your review.

To correct or update any information, click the appropriate **Edit** link, or click the Previous button.

***Note:** The Comment section can be used to document additional information about this application.*

*However, it should not be used to communicate with TRA. While the comments are visible to TRA, the field is not monitored and does not "send a message" to staff members.*

Click the **Submit** button (at the bottom of the screen) when you are certain the information is correct.

**Step 14. Print the confirmation page.**

A Submission Confirmation page is displayed.

The Print button enables you to print a copy for your records.

Click the **Close** button.

## **Correct a Submitted Leave Request**

Correcting a sabbatical leave of absence is done in the same manner as other leaves.

You can modify all leave requests that have not been certified for purchase.

1. Click **Leaves** on the main menu.
2. Click the **Search** button.
3. Select the leave from the search results
4. Click the **Record Id** link.
5. Make the corrections.
6. Click the **Submit** button at the bottom of the screen.
7. Review and verify the information is correct. Print the leave request if necessary.
8. Click the **Close** button.

## Cancel a Leave Request

Cancelling a sabbatical leave of absence is done in the same manner as other leaves.

1. Click **Leaves** on the main menu.
2. Click the **Search** button.
3. Select the leave from the search results.
4. Click the **Record Id** link.

*Note: You cannot cancel leave requests if the Status is "Pending payment."*

5. With the appropriate application displayed, under Actions, click **Cancel Application**.
6. Enter a comment. Explain why this application was cancelled. This is a mandatory field.
7. Click **Yes**.

The leave request is deleted. There is no confirmation.

Click **Close**.



## Part-Time Teacher Program Application

Part-Time Teacher Program (PTTP) application request are reported in the same manner as other leaves.

All leaves of absence are reported to TRA online through the website.

### Create a PTTP application

**Step 1. Click Leaves on the main menu.**

**Step 2. Click the New button.**

**Step 3. Select Part-Time Teacher Program from the drop-down box.**

The screenshot shows a software dialog box titled "Create New Application / Purchase". At the top, there is a text prompt: "Please select an Application/Purchase Type:". Below this prompt are two buttons: "Ok" and "Cancel". A dropdown menu is open, displaying a list of application types. The list includes: Extended Leave, Family Leave, Legislative Leave, Medical Leave, Military Leave, Other Leave, Parental Leave, Part-Time Teacher Program (which is highlighted with a red rectangular box), Sabbatical Leave, Strike Period, and Union Leave. The background of the dialog box shows a form with several input fields, including one labeled "Type:" and another labeled "Status:".

Click **Ok**.



**Step 5. Enter the TRA number of the employee granted the leave.**

Employee Information

Please enter the TRA No of the employee who is being enrolled in the Part-Time Teacher Program:

TRA No:  

Superintendents, chancellors, deputy chancellors and vice-chancellors are not eligible to participate in the Part-Time Program.

Click **Next**.

*Note: If you don't know the employee's TRA number, click the magnifying glass icon to search by name.*

Tip! When the TRA No. field loses focus -- when you click anywhere on the screen -- the employee's name is displayed. This enables you to verify you have the right person before proceeding.

**Step 6. Verify the employee meets all requirements.**

Click the checkbox to certify that the employee meets the requirements of the program.

I certify that the employee being enrolled in the Part-Time Program is not a superintendent, chancellor, deputy chancellor or vice-chancellor.

A Part-Time Teacher Program agreement must be approved before October 1 and submitted by October 1 of the year of participation, unless the participant is a legislator. For legislators wishing to participate in the program, this form should be submitted as soon as possible after the election, but by March 1 of the school year for which contributions will be made.

Click **Next**.

**Step 7. Indicate whether the employee is a legislator.**

Click the Yes or No checkbox.

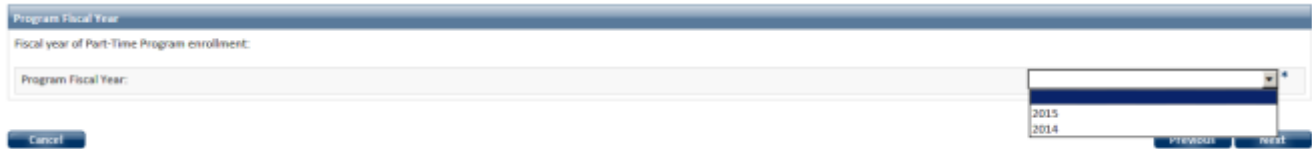
Please indicate below if this participant is a member of the legislature:

The Part-Time Teacher Program participant is a member of the legislature:  Yes  No

Click **Next**.

**Step 8. Select the year the employee will participate.**

From the drop-down list, select the year the employee will participate in the program.



If the program application is not for the current fiscal year, you must confirm the individual will not participate this year.



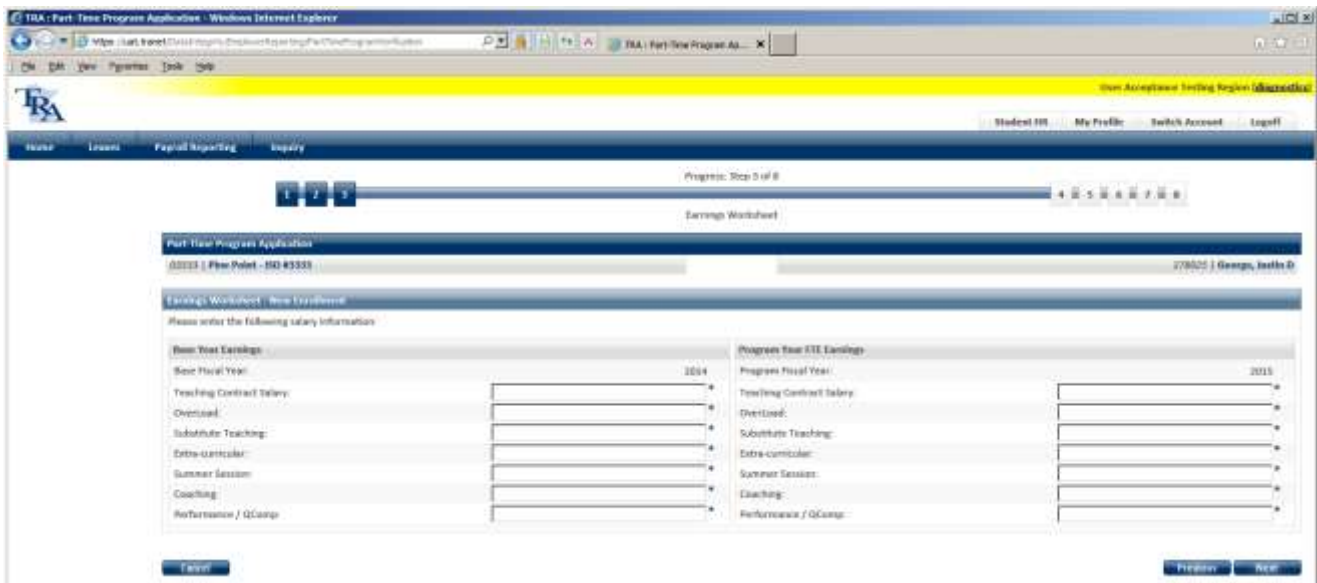
If it is not, you would cancel this application, create one for the current year, then create another for next year.

Click **Next**.

**Step 9. Enter employee salary.**

Provide the employee's earnings from the year prior to participating in the Part-Time Teacher Program and projected earnings that would have been paid during the participation year.

This information ensures TRA correctly calculates the PTP purchase cost.



**Note:** The dollar sign and comma are not necessary. They are added automatically.

All fields are mandatory. Enter a zero (0) if there was no salary.

**Step 10. Enter participation year salary.**

In the right-most grid, enter earnings projected during the participation year.

Program Year FTE Earnings	
Program Fiscal Year:	2015
Teaching Contract Salary:	<input type="text"/>
Overload:	<input type="text"/>
Substitute Teaching:	<input type="text"/>
Extra-curricular:	<input type="text"/>
Summer Session:	<input type="text"/>
Coaching:	<input type="text"/>
Performance / QComp:	<input type="text"/>

Provide the salary the employee would have been paid during the participation year had they not been in the program.

Again, all fields are mandatory. Enter a zero (0) if there is no salary.

Click **Next**.

**Step 11. Enter projected salary**

Provide the projected salary that will be paid to the employee.

Projected Part-Time Earnings	
Program participants must be compensated for an amount of at least 30 percent, but not exceeding 80 percent of the compensation established by the board for a full-time teacher with identical education and experience with the employing unit. Participation is based on the normal employment pattern of the employee. Use current bargaining agreement amounts.	
Program Year Teaching Contract Salary	\$ 65,000.00
Minimum compensation (30 percent of Program Year Base Contract Salary)	\$ 19,500.00
Maximum compensation (80 percent of Program Year Base Contract Salary)	\$ 52,000.00
Under the conditions of the program, the Projected Part-Time Earnings for this teacher will be:	<input type="text" value="5,000"/>

Note that the actual salary must be between 30% and 80% of the program year contract salary. (The above is only an example.)

Click **Next**.

**Step 12. Review calculated purchasable salary.**

This screen displays the calculated purchasable salary.

It also shows the employee and employer contributions due for the purchasable salary.

**Contributions on Purchasable Salary**

Projected Purchasable Salary is calculated as the difference between the Program Year Base Contract Salary and the Projected Part-Time Earnings.

Program Year Base Contract Salary:	\$ 60,000.00
- Projected Part-Time Earnings:	\$ 50,000.00
<b>= Projected Purchasable Salary during Program fiscal Year:</b>	<b>\$ 10,000.00</b>

Employee Deduction Rate:	7.5 %
Projected Employee Deduction Amount for Purchasable Salary:	\$ 1,125.00
Employer Contribution Rate:	7.5 %
Projected Employer Contribution Amount for Purchasable Salary:	\$ 1,125.00

Regular employee deductions and employer contributions must be made on the Total Program Year FTE Earnings. The purchasable salary portion of deductions and contributions must be paid in addition to the regular earned salary deductions and contributions.

The employee will be responsible for employee deductions on purchasable salary. Please indicate below who will be responsible for paying employer contributions on purchasable salary.

Employee percent share of Employee Deductions:	100.00 %
Employee percent share of Employer Contributions on Purchasable Salary:	0.00 %
Employer percent share of Employer Contributions on Purchasable Salary:	0.00 %

Buttons: Cancel, Previous, Next

The employee is required to pay the employee deduction amount.

However, the employer contribution cost may be shared -- in any percentage -- by the employee and the employer.

Enter the percent to be paid by the employee and the employer.

Click **Next**.

**Step 13. Indicate how the purchasable salary will be remitted.**

Click the appropriate checkbox: with your regular payroll remittances or via an invoice.

**Payment Method**

Employee contributions based on fiscal year salary, including contributions for the purchasable salary, will be classified as tax sheltered only if paid through payroll withholding. Employer contributions must be paid at the same time, either by the employee or by the employer or by an agreed upon combination. Employee-paid employer contributions are not tax-sheltered contributions.

If the employee chooses the direct billing method to pay for Part-time Teacher Program purchasable salary costs, the employee can transfer payment from an IRS-Approved qualified deferred tax fund.

Please indicate if payments will be made through payroll withholding, or if an invoice should be sent at the end of the program year.

Employee and employer contributions on purchasable salary will be remitted via payroll withholding

Please bill employee and employer directly for contributions on purchasable salary

Buttons: Cancel, Previous, Next

Click **Next**.

### Step 14. Review deduction and contribution schedule.

The schedule displays formulas enabling you to calculate the amount per pay period to remit to TRA.

**Deduction and Contribution Schedule**

You have indicated that payroll withholding will be used to effect payment of deductions and contributions on purchasable salary. You can calculate a deduction schedule by using the formulas below:

**Remaining Employer Paid Employer Contributions for the fiscal year**  
 Remaining Employer Paid Employer Contributions for the fiscal year = (Projected Purchasable Salary for fiscal year x Employer Contribution Rate for fiscal year \* percentage of contributions being paid by employee) - Actual Employer Paid Employer Contributions submitted via Payroll in fiscal year

**Remaining Employer Paid Employer Contributions per Pay Period for the fiscal year**  
 Remaining Employer Paid Employer Contributions per Pay Period = Remaining Employer Paid Employer Contributions for the fiscal year / Number of Remaining Pay Periods over which contributions will be taken in the fiscal year

**Remaining Employer Paid Employer Contributions per Pay Period for the fiscal year**  
 Remaining Employer Paid Employer Contributions per Pay Period = Remaining Employer Paid Employer Contributions for the fiscal year / Number of Remaining Pay Periods over which contributions will be taken in the fiscal year

**Remaining Employer Deductions for the fiscal year**  
 Remaining Employer Deductions for the fiscal year = (Projected Purchasable Salary for fiscal year x Employee Deductions Rate for fiscal year) - Actual Employee's Deductions submitted via Payroll in fiscal year

**Remaining Employer Deductions per Pay Period for the fiscal year**  
 Remaining Employer Deductions per Pay Period = Employee's Remaining Deductions for the fiscal year / Number of Remaining Pay Periods over which deductions will be taken in the fiscal year

Buttons: Cancel, Previous, Next

Basically, you divide the purchase cost (employee and employer contributions) by the number of remaining pay periods through May 31.

TRA depends on contributions being submitted by May 31. This ensures adequate time to reconcile the individual's purchase amount and send an invoice to them by June 30.

Click **Next**.

### Step 15. Certify participation is authorized.

Indicate that participation in the Part-Time Teacher Program was authorized.

**Certification**

Please certify that this teacher has been approved for the Part-Time Teacher Program by the governing board of your institution. This certification represents an excerpt of the official board minutes authorizing such participation, or a confirmation that participation was authorized under board policy permitting such action. Please check one of the two boxes below to indicate how participation was authorized:

Authorized by meeting/resolution  
 Authorized by policy

Please enter the Agreement Date that participation was authorized. If participation was authorized by a board meeting or resolution, enter the date of the meeting or resolution. If participation was authorized by board policy, enter the date of the adoption of the policy

Agreement Date:

Name of Authorized Administrative Official:

Date of certification and submission:

Buttons: Cancel, Previous, Next

Click the appropriate checkbox and enter the date participation was approved.

Click **Next**.

**Step 16. Review the information you entered.**

A summary of the information is displayed for your review.

To correct or update any information, click the appropriate **Edit** link, or click the Previous button.

***Note:** The Comment section can be used to document additional information about this application.*

*However, it should not be used to communicate with TRA. While the comments are visible to TRA, the field is not monitored and does not "send a message" to staff members.*

Click the **Submit** button (at the bottom of the screen) when you are certain the information is correct.

**Step 17. Print the confirmation page.**

A Submission Confirmation page is displayed.

The Print button enables you to print a copy for your records.

Click the **Close** button.



## **Cancel a Part-Time Teacher Program Application**

Cancelling an application is done in the same manner as other leaves.

1. Click **Leaves** on the main menu.
2. Click the **Search** button.
3. Select the leave from the search results.
4. Click the **Record Id** link.

*Note: You cannot cancel applications if the Status is "Processed."*

5. With the appropriate application displayed, under Actions, click **Cancel Participation**.
6. Enter a comment. Explain why this application was cancelled. This is a mandatory field.
7. Click **Yes**.

The application is deleted. There is no confirmation.

Click **Close**.