

# UCR Family and Medical Leave (FML) Department Checklist for Academic Employees



This checklist may be used when an academic employee requests a leave of absence (LOA) for medical or family reasons

<b>Employee Name:</b> Last	First	Middle Initial
<b>Department(s):</b>		
<b>Employee Information Packet:</b>		
<input type="checkbox"/> Cover Memo	<input type="checkbox"/> Notice of Eligibility and Rights & Responsibilities	<input type="checkbox"/> Return to Work Certification
<input type="checkbox"/> Leave of Absence Form	<input type="checkbox"/> UPAY 573	<input type="checkbox"/> Medical Certification
	<input type="checkbox"/> FML Benefits Fact Sheet	<input type="checkbox"/> Declaration of Relationship (if applicable)
<b>Date Provided to Employee:</b>	<b>By:</b>	<b>Method:</b>
		<input type="checkbox"/> In Person
		<input type="checkbox"/> Email (with Delivery/Read Receipt)
		<input type="checkbox"/> Certified Mail (Return Receipt Requested)

## FML ELIGIBILITY REQUIREMENTS [\(APM 715, APM 715-14\)](#)

<p>Requested Start Date _____ Return Date _____</p> <p><input type="checkbox"/> Intermittent FML (include proposed schedule)</p> <p>Employee has:</p> <p><input type="checkbox"/> 12 months cumulative service</p> <p><input type="checkbox"/> worked at least 1,250 hours in 12 months prior to start date</p>	<p><b>Reason for Leave:</b></p> <p><input type="checkbox"/> Own Serious Health Condition (Except Pregnancy Disability)</p> <p><input type="checkbox"/> To Care for a Newborn Child</p> <p><input type="checkbox"/> To Care for a Newly Adopted Child, or a Child Recently Placed into Employee's Foster Care</p> <p><input type="checkbox"/> To Care for a Child, Spouse, Parent, or Domestic Partner With a Serious Health Condition</p>
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Is employee eligible for FML?  Yes  No

FML is normally limited to 12 weeks in a 12-month period. Has this employee used FML leave within the past 12 months?  
 Yes  No If yes, when did leave year begin? \_\_\_\_\_ Remaining entitlement for federal FML? \_\_\_\_\_ weeks

## SICK/MEDICAL LEAVE [\(APM 710\)](#)

Research APM Policies on the academic series  Verify leave accrual code on Payroll Personnel System (PPS)

Does employee accrue vacation leave?  Yes  No Does employee accrue sick leave?  Yes  No

*If academic employee accrues vacation and/or sick leave, accrued paid leave may be substituted for unpaid leave in accordance with UCR's FML Basic Requirements/Campus Guidelines. For Academic appointees who do not accrue sick leave and/or vacation leave, see [APM 710-11](#).*

## ACTIONS

<input type="checkbox"/> Leave of Absence Request <input type="checkbox"/> Academic Leave Form (UPAY 573) <input type="checkbox"/> Medical Certification <input type="checkbox"/> Declaration of Relationship, if applicable  Date: _____	<p><b>To Academic Personnel Office (APO):</b></p> <input type="checkbox"/> Declaration of Relationship (if applicable) <input type="checkbox"/> Leave of Absence Request <input type="checkbox"/> Academic Leave Form (UPAY573) <input type="checkbox"/> Medical Certification <input type="checkbox"/> Copy of Cover Memo w/Notice of Eligibility & Rights & Responsibilities  Date: _____	Academic Personnel will send a copy of the Approved or Denied leave forms to the Employee, Department, Dean's Office, and Payroll.  <input type="checkbox"/> Received Copy of Approved or Denied Leave Request Form from APO  Date: _____
<input type="checkbox"/> Received Absence Notices/Time Sheets (if applicable)  Date: _____	<input type="checkbox"/> Received Return to Work Certification  Date: _____	<input type="checkbox"/> Entered into PPS  Date: _____

## RECORD KEEPING AND RETENTION

Whether leave is approved or denied, all documents (see checklist below) pertaining to FML leave are to be retained for at least three (3) years. All FML and medical records should be maintained in a confidential manner and separate from the employee's personnel file. The Home department is the "Office of Record" for Leave of Absence records. For UC's Records Retention Schedule, click here: <http://recordsretention.ucop.edu/>

• FML Department Checklist	• Leave of Absence Request Form	• FML Medical Certification
• UPAY 573	• FML Notice of Eligibility	• Return to Work Certification
• All Correspondence Pertaining to the leave	• Part-Time Work Agreement (if applicable)	• Declaration of Relationship (if applicable)

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## STEPS IN THE PROCESS

### EMPLOYEE REQUESTS LEAVE

Request must be made 30 days in advance of leave date if feasible, or as soon as need for leave is known if less than 30 days.

### DEPARTMENT DETERMINES ELIGIBILITY FOR FMLA LEAVE

*Employee must have at least 12 months of University service (need not be continuous) and at least 1,250 hours actually worked in the 12 month period immediately preceding commencement of the leave (hours actually worked includes overtime, but does not include holiday, vacation, or sick leave).*

### DEPARTMENT NOTIFIES EMPLOYEE OF ELIGIBILITY AND RIGHTS

Notification made within five (5) business days of receipt of leave request. In addition to the Cover Memo, Eligibility and Rights Notification consists of all of the following:

- ✓ [Notice of Eligibility and Rights and Responsibilities](#)
- ✓ [UPAY 573](#)
- ✓ [Leave Request Form](#)
- ✓ [Certification of Health Care Provider Form \(select appropriate form\)](#)
- ✓ [Declaration of Relationship \(if applicable\)](#)
- ✓ [Return to Work Certification Form](#)
- ✓ [Family and Medical Leave Fact Sheet](#)

### EMPLOYEE PROVIDES APPROPRIATE MEDICAL CERTIFICATION

If employee does not provide certification within 15 days, department head provides a follow-up memo. If certification is unclear or incomplete, department requests additional information.

### EMPLOYEE SUBMITS LEAVE REQUEST

Employee completes employee section of the Leave Request Form and UPAY 573, attaches the certification and gives it to the department head.

### DEPARTMENT (OR EQUIVALENT) VERIFIES AND COMPLETES LEAVE REQUEST FORM

Checks for accuracy ensuring compliance with applicable policy or collective bargaining agreement

Forwards the request to the final approval authority via the Dean's Office (or equivalent). See Delegation of Authority Chart for final approval authority.

### FINAL APPROVAL AUTHORITY PROVIDES EMPLOYEE WITH FINAL DECISION

See Delegation of Authority Chart for final approval authority.

### DEPARTMENT PROCESSES LEAVE TRANSACTION IN PPS

For information regarding PPS entry, contact the Payroll Office.