Compassionate Transfer of Leave Policy

Policy

Employees who are eligible to accrue and use vacation leave, but are (a) unable to work due to a catastrophic personal illness or injury, or (b) are absent due to a catastrophic illness or injury within their immediate families or established households, or a situation that places primary responsibility for care on those employees, and who have exhausted their available balances of paid leave hours (i.e., vacation, paid sick time, and compensatory time) may receive contributions of vacation hours from other eligible employees. Employees who are eligible to accrue and use vacation hours, regardless of their employment category, may transfer their accrued vacation to such employees.

Compassionate transfers of leave shall be accomplished by determining the dollar value of the number of vacation hours contributed, by decreasing the contributor's balance of accrued vacation hours, and by increasing the recipient's accrued paid sick time balance. Contributors must retain a minimum balance of 80 hours of vacation. Such compassionate transfers of leave must be voluntary on the part of the contributor.

Compassionate transfers of leave shall not exceed the anticipated period of disability. In the event the affected employee becomes eligible to receive long-term disability benefits, contributions of vacation hours which would otherwise be credited to the employee will not be permitted on or after
the date of inception of long-term disability benefits. Subsidization of long-term disability or workers compensation benefits will not be permitted, other than during the initial period of waiting for such benefits to commence.

Employees enrolled in a short-term disability program offered by the University must apply for and, if eligible, receive their short-term disability benefits before compassionate transfer of leave contributions can be used beyond the initial short-term disability waiting period. Compassionate transfer of leave contributions (other than for the initial short-term disability waiting period) for such employees may only be used to supplement the short-term disability payment up to but not to exceed the employee's regular rate of pay.

**Definition**

An illness or injury shall be catastrophic if it is:

1. Seriously incapacitating (in the case of the employee, the employee is unable to perform all the duties of the position held at the time of the injury or upon inception of the illness, and is unable to perform available light duty-work); and
2. Of extended duration (the anticipated duration of the disability is not less than 45 calendar days); and
3. Confirmed in writing by a physician chosen by the employee, and subject to reconfirmation by a physician chosen by the University.

**Recipient Eligibility**

Employees who are eligible to receive compassionate transfer of leave contributions are those who are eligible to earn and use vacation hours, have exhausted all forms of paid leave (i.e., vacation, paid sick time, and compensatory time) prior to the transfer of leave hours, and are not receiving either long-term disability benefits or workers compensation benefits.

**Procedure**

**Recipient**

Obtain physician's statement confirming catastrophic illness or injury and its anticipated duration. Inform department supervisor payroll representative of desire to receive compassionate transfer of leave contributions by requesting and completing a Compassionate Transfer of Leave Request form. Return the form and physician's statement to the payroll representative.

**Recipient's Payroll Representative**

Review Compassionate Transfer of Leave Request form, physician's statement, and employee records. Sign form to confirm employee's eligibility to receive contributions of leave hours. Inform departmental employees, and others as appropriate, that contributions of vacation hours are being accepted for compassionate transfer of leave to the affected employee.

**Contributor**

Inform department payroll representative of desire to contribute vacation hours to affected employee by requesting and completing a Compassionate Transfer of Leave Contribution form and returning the form to the payroll representative.
Contributor's Department Payroll Representative

Confirm contributor has sufficient available vacation hours to permit transfer of leave with a minimum of 80 hours of vacation remaining after contribution. Convert hours contributed into dollars by completing the processing information section of the Compassionate Transfer of Leave Contribution form. Forward completed forms to the payroll representative for the recipient's department.

Recipient's Department Payroll Representative

Complete a Compassionate Transfer of Leave Processing Information form. Typically, Compassionate Transfer of Leave Contribution forms are processed in the order received. Do not process more vacation contribution hours than are sufficient to pay the recipient from the last paid day to the anticipated duration of illness/injury, as certified by the latest physician's statement. (Include holidays and projected vacation and paid sick time accruals.) Convert the dollars contributed into hours and increase the recipient's sick hours by a number equal to the total hours to be processed at this time (see Processing Form). Contributions will be reflected as an increase in the recipient's sick hours equal to the total of vacation dollars contributed to be processed at this time.

Forward all completed forms and physician's statement to the Division of Human Resources.

Division of Human Resources

Review documentation. Determine if there will be an effect upon any possible long-term disability benefits to prevent subsidization. Coordinate with Risk Management Services to ensure subsidization of workers compensation benefits will not occur. Sign and forward completed Compassionate Transfer of Leave Processing Information form with attached Compassionate Transfer of Leave Contribution form(s) to Payroll for data entry.

Recipient's Department Payroll Representative

Enter paid sick time hours on time roster for recipient. The amount entered may not exceed the number of hours contributed and processed by Payroll to date.

If the recipient employee's absence extends beyond the originally anticipated duration of absence, the above procedure can be repeated if additional contributions are available.

Within 30 calendar days after the recipient's return to work, notify prospective contributors that their Compassionate Transfer of Leave Contribution forms have not been processed because the affected employee has returned to work, and destroy the forms. If a contributor is an employee of another department, return the unprocessed Compassionate Transfer of Leave Contribution form to that department's payroll representative, and advise payroll representative to notify the contributor that the contribution of hours was not processed.

Note: A minimum of one pay period may elapse between the time the Compassionate Transfer of Leave Contribution and Processing Information forms are processed and when the contributed hours are reflected in the available balance of paid sick time hours of the recipient. Complete and forward forms to the Division of Human Resources, preferably before the employee's paid leave has been exhausted.
Related Information*

Arizona Board of Regents Policy 6-809. Compassionate Transfer of Leave [2]

Revision History*

Revised June 2007

Unit names updated April 12, 2015

This policy is currently undergoing revision.

Source URL: http://policy.arizona.edu/employmenthuman-resources/compassionate-transfer-leave

Links
[1] mailto:hradmin@email.arizona.edu