Leave Balance Transfer

Overview
The Leave Balance Transfer screen provides agencies the ability to transfer an employee’s leave balances across agencies. When an employee moves between state personnel system or to/from the Florida Department of Lottery and his or her leave is eligible for transfer, this screen should be used to process the transfer. This screen cannot be used to transfer leave to/from Justice Administrative Commission or State Courts System. Leave can only be transferred once both Personnel Action Requests (separation and appointment) have been completed.

Definitions
The following fields are included in the Leave Balance Transfer Overview section:

- Record Type – Will indicate the type of record being displayed
  - Available Balance – Employee’s available balance that can be transferred for selected leave type
  - Balance Transferred – Employee’s balance that was transferred for selected leave type

- Leave Type – The following are the only leave types that can be transferred
  - Annual Leave
  - Sick Leave
  - Personal Holiday
  - Military Training Leave

- Date – Will be the system date for “Available Balance” records and the date the transfer was completed for “Balance Transferred” records

- Hours - Present hours as follows
  - For Available Balance records, this will display the remaining balances as of the last day the individual was employed in the agency. (If the employee is still active, this will show the current balance as of the system date.)
  - For Balance Transferred records, this will display the hours that were transferred.
  - For Personal Holiday records, this will display the number of days (always 1 or 0), not hours.

The following fields are included in the Details section:

- Transfer Date – This field will be read only and will default to the employee’s last day employed.
- Leave Type – This field will be read only and will default to the leave type selected in the overview section.
- Number of Hours – This field can only be edited when creating a new balance transfer.
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- For annual leave and sick leave, the user may transfer all or part of the hours, but not more; multiple transfers are allowed, but may not exceed the overall balance for the leave type.
- For personal holiday, the user may transfer the number of days if available.

- Receiving ID – This field will be read only and will default to the leave eligible appointment ID that will receive the transfer.
  - To transfer leave, the other leave-eligible ID must have an effective date of at least one day after the last day employed for the transferring ID,
  - Leave cannot be transferred across IDs if the employee is dually employed.

- Receiving Agency – This field will be read only and will default to the agency of the leave eligible appointment ID that will receive the transfer.

- Comments – This field will store up to 255 characters and is editable when a new transfer record is created.

- Date Entered – This field will be read only and will default to the date the transfer record was created.

- Created By – This field will be read only and will display the appointment ID of the employee that created the transfer record.

Authorization

Users with a security role of A, H, U, X, and Y will be able to process a leave balance transfer for up to 60 days after an employee terminates. Users with a security role of C, F, G, I, K, N, and S will be able to view leave balance transfers that have been processed.

Process Steps

In order to process a leave balance transfer for an employee, the following must have occurred:

1. A separation PAR must be completed by the exiting agency.
2. An appointment PAR must be completed by the hiring agency.
3. Both appointment IDs must be in a leave-eligible position in the State Personnel System or at the Florida Department of Lottery.
4. Employee must not have been dual hired or have overlapping employment between the transfer positions.

The leave that is transferred will be available for Career Service or SES/SMS employees for use on their date of appointment into the new agency.

To process a leave balance transfer:

**Step 1:** Select My Team tile
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Step 2: Search for and select the terminated appointment ID from the My Team screen.

Step 3: Select Time and Attendance > Leave Balance Transfer

Step 4: Select the leave type record to transfer (annual, sick, or personal holiday). Each leave type must be transferred separately.

Step 5: Enter the number of hours to transfer

Step 6: If applicable, enter comments

Step 7: Select “Save”

After completing the leave balance transfer, the user can then view the employee’s Leave Balance Overview screen and see the transferred hours reflected as “Hours Transferred Out” on the employee’s last day employed at the exiting agency.
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The new agency will see the transferred hours as “Hours Transferred In” on the employee’s appointment date at the new agency.

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<table>
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