

[Academic Forms On-line](#) [Sabbatical/Leave of Absence Request](#)

General Guidelines:

This information explains the procedures and routing of sabbatical leaves and other types of leaves of absence.

The following chart outlines the approval authority for specific types of leave:
<http://academicpersonnel.ucdavis.edu/AcademicAppointeeLeaveApprovalChart.pdf>

You may use the Sabbatical/Leave of Absence form from Forms On-Line for any type of leave that would formerly be requested via the UPAY 573 form.

Please see the Academic Personnel Manual (APM) Section V – Benefits and Privileges for policy information regarding different types of leaves for academic appointees.
<http://manuals.ucdavis.edu/apm/apm-toc.htm>

Procedures

Initiating Forms:

The Leave of Absence form should be initiated by the Academic Appointee whenever possible; however department staff may initiate and edit forms, save drafts, and in some cases, submit a Leave of Absence form if the faculty member is unavailable, as in the case of a leave for extended illness. Sabbaticals must always be submitted by the faculty person because they must sign/acknowledge the return to service requirement.

Faculty and staff may initiate forms by logging into the Forms On-Line system with a campus ID and Kerberos password.

After initial login faculty will be taken to the **Forms** tab. Staff, Department Chairs, and Deans have access to two additional tabs, **Review** and **Reports**, and will begin on the **Review** tab.



Each of these functions may be performed by selecting the appropriate tab in the gold ribbon at the top of the page.

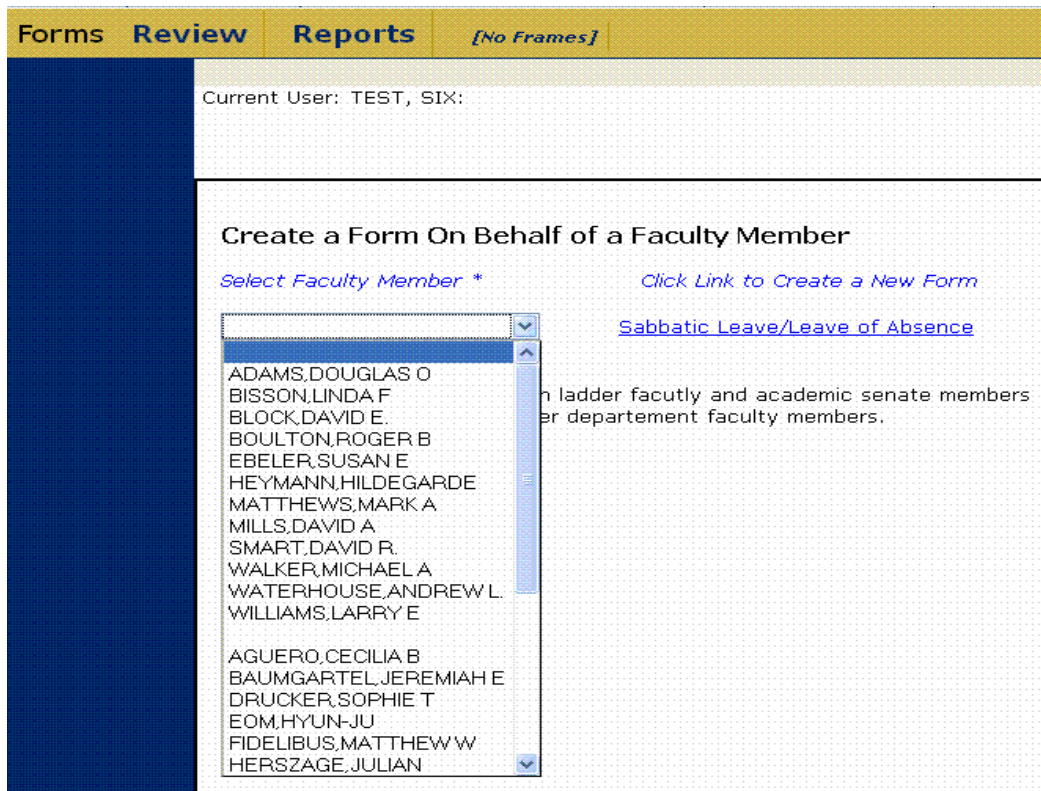
- Select **Forms** when you want to create a new form
- Select **Review** when you want to review a form already created and send it to the next review/approval level

- Select **Reports** when you want to view all the actions for a particular type of form for a specific department in a given year.

If you are a faculty member, select the **Forms** menu, then select the type of leave you would like to request from the drop-down menu on the right side of the screen. You may also view any forms that you have already submitted by choosing from the drop-down menu labeled “View Past Requests”, located under the ‘Select Forms’ drop-down menu.

Select Forms	Sabbatic Leave/Leave of Absence ▼
View Past Requests	View All ▼

Administrators and MSOs can initiate new forms for faculty members by selecting the **Forms** section on the gold ribbon. A list of academic appointees within your department is available via the pull down menu “Select Faculty Member”. Select the name of the faculty member, then click the link of the form you wish to initiate.



When an administrative staff member drafts a form for a department member, an email is generated to the faculty member alerting them that a form has been initiated on their behalf and is ready for review and submission.

Drafts can be accessed by faculty by using the **View Past Requests** drop-down menu by clicking on either the 'Draft' or 'Edit' link.

Current User: TEST, ONE: ASSOC PROFESSOR - FISCAL YR Select Forms
 Department: Dept of Testing View Past Requests View All

REVIEW CURRENT AND PAST ACTIONS [\[include deleted documents\]](#)

Status	Type	Last Update	Description			
Draft	OutActReq	07/06/2010 10:32	CH2MHill is a broad based engineering, hydrolog	Edit	Delete	Template
Pending	OutActReq	08/31/2010 10:42	General test	View	Cancel	Template

Staff can access drafts from the **Review** tab, also by clicking on either the 'Draft' or 'Edit' link.

TEST, ONE	View	Leav/Sbbtc	08/03/2009 13:52.31	Sabbatical In Res Full Salary	View	<i>Complete sabbatical form</i>
TEST, ONE	Draft	Leav/Sbbtc	06/18/2009 13:29.20	Sabbatical Partial Salary	Edit	

After the form has been completed, the form must then be **submitted**. Click the [Submit](#) text in blue at the bottom of the form.

[Submit](#) [Draft](#) [Undo Changes](#)

This action will send the form to the next level of review, and an email is generated to alert the person that an action has been submitted to him/her for their review and action. The screen will 'reload' and you will see a copy of the completed form. You may then save your document on your computer by clicking [Download document](#) at the top of the form. A template of the form that was filled out may also be created by clicking [Template new request](#) at the top of the form. This feature can be used if more than one time period or type of leave needs to be submitted.

[Download document](#) [Template new request](#)

If the form was submitted by the faculty member, it will be available for review by the administrative staff member, then will be submitted to the Department Chair for review and concurrence.

Depending on the type of leave requested and the approval authority for that leave, (see link above), the form may require additional routing to Academic Personnel staff for review and submission to the Vice Provost for Academic Personnel for approval. An email is generated to the faculty member and all staff in the routing chain when a final approval has been made.

Reviewing Forms

If you are a **Reviewer**, **Department Chair**, **Dean** or other approving administrator, select the **REVIEW** tab at the top of the screen in the gold ribbon. All reviewer lists may be sorted by the type of form, by specific department, or by person.

Use the drop down boxes to:

- View Form: to choose a specific type of form
- View Department: to select by a specific department
- View Person: to sort by records for an individual

If no forms have been submitted using the Forms On-Line system, then no records will appear. The list may also be downloaded by clicking on the [Download Records List](#) next to the update button.

The screenshot shows a control panel with the following elements:

- Three filter options: "View Action Items" (checked), "View Pending Items" (unchecked), and "View All Other Items" (unchecked).
- Two dropdown menus: "View Form:" and "View Department:".
- Another dropdown menu: "View Person:".
- A checkbox: "Include Past Faculty Names" (unchecked).
- Two buttons: "Update" and "Download Records List" (underlined).

View Action Items

You may select actions that require your review and submission only by checking the

View Action Items box at the top of the screen, then clicking the button. A list of actions for your review will appear containing the name, status, type of form submitted, last update date and a more detailed description of the form request. Select the [View](#) link at the right side of the row for the person you would like to review. This will bring up the form for your review.

Administrative staff member may return the form to the faculty member for additional information by selecting [Return*](#) at the bottom of the form if the submitted form is not complete or if changes to the form are required. Please note that all returns require a comment in the [Comments](#) field explaining the reason for the return of the form before the action can occur. An email is generated when a form is returned for additional information alerting the submitter that action is required.

After corrections are submitted, the administrative staff member may then [Submit](#) the form to the Department Chair for review. The Department Chair may then [Submit](#) the form to the Dean's Office staff, or [Return*](#) the form to the administrative staff for further

corrections or information. Dean's office staff will then review and [Submit](#) or [Return*](#) the form, then the Dean will review and either [Submit, Approve](#) or [Return*](#) the form. Dean's office staff may also edit the form for correction. If edits occur, an email alert is generated to the faculty person and all department staff previously in the routing chain.

View Pending Items

You may also view a list of actions you have reviewed and submitted but have not yet been approved, by checking the View Pending Items box at the top of the page, then clicking the button. A list of actions will appear. Note that these actions will show a status of [En Route](#) in the [Status](#) column. Select the [View](#) action link at the right side of the row for the person you would like to review. This will bring up the form for your review. At the bottom of the form you will see [\[+/-\] View Routing History](#). Click on the [\[+/-\]](#) symbol to open (or close) a table outlining the routing history of the form. This table shows the date and time the form was routed to the next person, if the action was submitted, reviewed, returned, denied or approved by a user, and where the form currently resides in the routing system.

You may return to your list of actions by clicking the button again.

View All Other Items

A list of completed forms may be viewed by checking the View All Other Items box at the top of the page, then clicking the button. A list of actions will appear. This will allow you to review all past actions that have been reviewed and approved and select specific forms if needed.

Creating Reports

Select the Reports tab at the top of the screen in the Gold ribbon.

Review Reports

This will allow you to run reports by department if you are located in a department, or by College/School if you are located in a Dean's office or central administrative office. Reports may be created for a particular year, or for a particular type of report. First, select the department or college from the drop down menu. For a report on Outside Professional Activities, enter the year of the report you would like to create. Next, select [View Excel](#) [Email*](#) to create the report and view it on-line, download it to Excel, or

Email it to another office. Similar reports may be created for Sabbatic/Leaves of Absence.

Sabbatical Leave Form:

Please refer to the General Guidelines above for instructions on how to initiate and route a leave form request in the Forms On-Line system.

See [APM 740](#) for eligibility and policy for Sabbatical Leave. *Note: Professors in Residence, Professors of Clinical _____ and Lecturers with Security of Employment are eligible for Leave with Pay in lieu of sabbatical and may use the same form to request these leaves.*

The Sabbatical/Leave request form will normally be initiated by the faculty member, but may be initiated by department staff. As noted above, an email is generated to the faculty member alerting them that a form is ready for review and submission if an Administrative staff member drafts a form for them.

After navigating to the **Forms** tab in the gold ribbon at the top of the page, select the Sabbatic Leave/Leave of Absence from the drop-down menu on the right side of the screen (faculty) or choose the name of the faculty person and click Leave/Sabbatical (staff). Select the Type of Leave you are requesting from the drop down menu. After the initial selection of the "Type of Leave", the form will show all the required fields for completion of the specific leave request. Complete the required fields.

SABBATICAL / LEAVE OF ABSENCE FORM

<p style="text-align: center;">Type of Leave</p> <p>01 Sabbatical Full Salary <input type="button" value="v"/></p>	<p style="text-align: center;">Pay Period of Leave</p> <table style="width: 100%;"><tr><td style="text-align: center;">Begin Date</td><td style="text-align: center;">Return Date</td></tr><tr><td style="text-align: center;">[] [] [] []</td><td style="text-align: center;">[] [] [] []</td></tr><tr><td style="text-align: center;">(mm-dd-yy)</td><td style="text-align: center;">(mm-dd-yy)</td></tr></table>	Begin Date	Return Date	[] [] [] []	[] [] [] []	(mm-dd-yy)	(mm-dd-yy)
Begin Date	Return Date						
[] [] [] []	[] [] [] []						
(mm-dd-yy)	(mm-dd-yy)						

Academic Year Service Quarter(s)/Semesters Affected Summer Fall Winter Spring

Address While On Leave
Check box if an international address:

[]

Reason for or Specific Purpose of Proposed Leave (for Sabbatical include location while on proposed leave)

[]

Other Sources of Income While On Leave (Sabbatical - Indicate nature and amount of all income)

[]

Are You a Principal Investigator? Yes No Name of Substitute: []

Program Leave Statement
For application information see [APM 740-94](#)

Attach document [] pdf and MS Word documents only - file size limited to 1 MB

[Standing Order 103 of the Regents](#)

I hereby certify that I have read the Standing Order of the Regents and the Regulations of the President governing the award of sabbatical leaves, and that I shall accept the requested leave, if granted, under the conditions set forth in these regulations and shall continue my service at the University following said leave for a period of at least equal to that period of the leave.

[Submit](#) [Draft](#) [Undo Changes](#)

For Sabbatical leaves the 'Pay Period of Leave' fields will populate automatically based on the Academic Year Service quarter checkboxes selected. Note that the actual date fields can be changed.

Type of Leave		Pay Period of Leave					
01 Sabbatical Full Salary		Begin Date			Return Date		
		10	01	09	12	31	09
		(mm-dd-yy)			(mm-dd-yy)		
Academic Year Service Quarter(s)/Semesters Affected		Summer	<input type="checkbox"/>	Fall	<input checked="" type="checkbox"/>	Winter	<input type="checkbox"/>
		Spring	<input type="checkbox"/>				

Also note there is a field to upload or attach a document, such as the required sabbatical leave proposal. (See [APM 740-94](#) for information on requirements for the sabbatical leave proposal.) At the bottom of the screen, you may Submit the form to the next level of review, save a Draft of your work, or Undo Changes you have made.

Sabbatical leaves cannot be submitted without checking the box that indicates the faculty member has read Box 20, Standing Order 103 of the Regents. This statement certifies that the faculty member agrees to the terms of the leave, and that he or she will continue their service at the University following the leave for a period of at least equal to the period of the leave. This is a requirement by policy [APM 740-16d](#).

After the submission of the form by the academic appointee, administrative staff may then **Review** the form (See the General Procedures above) to ensure complete and accurate information. For Sabbatical Leaves, administrative staff should also complete the information required at the departmental level when the type of leave requires administrative information, as outlined in the example below.

Additional Sabbatical Information

If applicant is on a medical school compensation plan please show proposed salary distribution while on leave. %

If necessary to employ a substitute, what addition to the department budget is required? \$

If leave is granted, what distribution is to be made of applicant's classes?

[Submit](#) [Draft](#) [Return*](#)

Comments: (characters remaining) * *Comments are required if returning*

An email is generated to the faculty member and all staff in the routing chain when a final approval has been made.

Family and Medical Leave and Leaves of Absence for Extended Illness:

Please refer to the General Guidelines above for instructions on how to initiate and route a leave form request in the Forms On-Line system.

First select the Type of Leave you are requesting from the drop down menu at the top of the form.

There are six different choices for FMLA leave: pregnancy, extended illness, and family care, with or without pay. Please refer to the appropriate policy section in the Academic Personnel Manual for the type of leave you are requesting.

<https://academicpersonnel.ucdavis.edu/leaves.cfm>

The screenshot shows a dropdown menu titled "Type of Leave". The menu is open, displaying a list of options. The options are: 15 FMLA w/o Pay Pregnancy, 03 Sabbatical in Res Full Salary, 14 Sabbatical In Res Partial Sal, 06 Govt/Public Service, 07 Professional Development, 08 Personal, 11 Military, 12 Special Research, 13 Admin, 18 NSF Benefit Bridge, 04 Pregnancy Disability, 05 Extended Illness, 15 FMLA w/o Pay Pregnancy, 15 FMLA w/o Pay Ext Illness, 15 FMLA w/o Pay Family Care, 16 FMLA with Pay Pregnancy, 16 FMLA with Pay Ext Illness, 16 FMLA with Pay Family Care, and 99 Other. The option "04 Pregnancy Disability" is currently selected and highlighted in blue.

FMLA leave and leave for Extended Illness are paid leaves if they meet specific criteria as outlined in [APM 715](#), [APM 710](#), and/or [APM 760](#). A link to these policies is located in the blue side bar to the left of the form.

Select **04 Pregnancy Disability** leave or **05 Extended Illness** leave if the leave requested is not covered under FMLA leave. This may occur if FMLA has been exhausted for the year.

The screenshot shows a portion of the leave form. On the left is a dark blue sidebar with white text: "Policies", "Instructions", "Standing Order 103 of the Regents", and "State Privacy Notification". The main form area is light gray. At the top right, it says "SABBAT". Below that is a dropdown menu labeled "Type of Leave". Underneath the dropdown is a section for "Academic Year Service" with a label "Quarter(s)/Semesters Affected" and a "Summer" checkbox.

After the initial selection of the "Type of Leave", the form will display the required boxes necessary for completion of the specific leave requested. Complete the required fields.

Note there is a field to upload or attach a document if necessary.

If this is not an extension of a previous leave, the leave form cannot be submitted without checking the box that indicates the faculty member has checked the box next to the SPECIAL LEAVE OF ABSENCE language.

Short term Leave for Professional Development

Please refer to the General Guidelines above for instructions on how to initiate and route a leave form request in the Forms On-Line system.

Refer to [APM 752](#) (Leave to Attend Professional Meeting) and [APM 758](#) (Other Leaves With Pay) for the general policies on short term leaves. Leaves under 7 calendar days may be approved by the department chair. Leaves over 7 calendar days, but not greater than 30 may be granted by the Dean. All leaves over 30 calendar days are considered exceptional, are reviewed on a case by case basis, and must be approved by the Vice Provost—Academic Personnel.

Select the leave type **07 Professional Development** or **12 Special Research** leave from the Type of Leave drop down box, then add the Begin date and End date of the leave and the remainder of the required fields. An attachment may be included containing an itinerary or other documentation to justify the leave.

Leaves Without Pay

Please refer to the General Guidelines above for instructions on how to initiate and route a leave form request in the Forms On-Line system.

Leaves of absence without pay for good cause may be granted by the Vice Provost—Academic Personnel. Please see [APM 759](#) for the policy on Leaves Without Pay.

Other Types of Leave

Please refer to the General Guidelines above for instructions on how to initiate and route a leave form request in the Forms On-Line system.

Other types of Leave such as leaves for Military service and Leave for Service to Governmental Agencies are approved by the Vice Provost – Academic Personnel. Policy on these types of leaves may be found at [APM 751](#) and [APM 750](#) respectively.