Faculty Career Leaves Online Submission System

User Manual for Leave Applicants

Carleton University

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The Leave Request Launch Page

Log into Carleton Central and select the **Faculty Services** tab. Clicking on the **Submit Faculty Leaves Requests** link will take you to the **Leaves Request Launch Page**.

Leave Request Launch Page

Click here to view **Faculty Profile**

Status of Previously Submitted Leaves: [-- All --] Term (Based on Leave Start Date): [-- All --] [Go]

ID	Reviewer Level	Request Type	Leave Type	Begin Date	End Date	Status	Action
258	Dean/1	Leave Request	Court Leave	2016-07-11	2016-07-15	In Progress	Review
259	Provost/1	Leave Request	Sabbatical	2017-07-01	2018-06-30	Approved	Review
266	Dean/1	Leave Request	Reduced workload art 13.5	2016-09-05	2016-12-31	Denied	Review
267	Applicant(Final)/1	Leave Request	Reduced workload art 13.5	2016-07-04	2016-12-31	Approved	Review
274	Dean/1	Leave Request	Sabbatical	2016-07-01	2017-06-30	Locked-Delay Request in progress	Review
276	Provost/1	Leave Request	Reduced Time art 9.10	2016-11-01	2016-11-30	In Progress	Review
277	Provost/1	Leave Request	Reduced Workload Art 13.6	2016-12-01	2016-12-31	In Progress	Review
294	Dean/1	Leave Request	Sabbatical	2016-09-01	2016-12-31	In Progress	Review

New/Cancel/Postpone - Leave Request

[Initiate a Leave Request]   [Cancel a Leave Approved by the Provost]   [Postpone a Leave Approved by the Provost]

The Leave Request launch page displays the following details:

- Leave request **ID** number

- The **Reviewer Level** where the leave request currently resides

- The **Request Type**
  - Leave request
  - Request to delay submitted sabbatical request
  - Request to postpone approved leave
  - Request to cancel approved leave

- The **Leave Type**:
  - Sabbatical
  - Extended sabbatical
  - Administrative leave
  - Court leave
  - Academic/professional development
  - Political leave
  - Leave of absence without pay
  - Reduced time - article 9.10
  - Reduced workload - article 13.5
  - Reduced workload - article 13.6

- Leave begin and end dates

- The current **Status** of the leave:
  - Approved
  - Cancelled
  - Delayed
  - Postponed
  - Denied
  - In-progress
  - Saved
  - Returned for correction
  - Locked – change request in progress
  - Locked – delay request in progress

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Each of the columns of data on the launch page can be sorted by clicking on the sorting arrows at the top of the columns, and the data displayed on the page can also be filtered by Status and Term using the drop-down menus at the top of the page. Clicking the **Faculty Profile** link in the upper left will display your profile which includes data you can use to determine eligibility for future leaves.

The launch page is also the place where you will go to **initiate** a new leave request, **cancel** a leave request that has already been approved by the Provost, or **postpone** a sabbatical that has already been approved by the Provost. Proceed to page 5 for instruction on initiating a new leave request.

Initiating a New Leave Request

1. Click the **Initiate a Leave Request** button. This will cause the leave request form to open:

Return to Leave Request Launch page

Leave ID: 331	Reviewer Level: Applicant	Status: New

Instructions
1. Please complete the form below to submit your requested dates. For sabbatical this should be submitted no later than October 31. For other leaves this should be submitted at least six months prior to the start of the leave.
2. If applicable please upload your sabbatical leave plan. This must be submitted at least six months prior to the start of the leave and no later than three months prior.
3. If applicable please upload your sabbatical report. This should be submitted no later than three months after the end of the sabbatical.
4. The Dean/UL should review the information on this form. If applicable, the sabbatical leave plan is reviewed separately from the dates and remuneration. If any information is incorrect, the Dean/UL may edit or return the form for correction to the Executive Administrator

Click here to view Faculty Profile

Faculty Details

Banner ID	101058159		Name	FCM Leaves Tester2
Rank	Full Professor		Appt. Status	Tenured
Positon	799553			

Academic Unit	Faculty	Home Unit	Percentage
Biology	Faculty:Science	Yes	100

Leave Details

Instructions
The reviewer should review all the details in the Leave Details section, the leave type specific section that follows, and then make a recommendation to the Dean. If any changes are required, the Academic Head may return the request to the leave applicant for correction.

*Type of Leave   -- Select --

*Start Date1 YYYY/MM/DD   (usually first day of the month)   *End Date1 YYYY/MM/DD (usually last day of the month)

*Purpose of Leave (approx. 50 words)

Comments (Applicant)

Reset   Save Leave Request

A unique leave request ID number will be generated by the system in the upper left. The **Faculty Details** section will, with your log-in to Carleton Central, pre-populate with details such as your Banner ID, rank, position number, name, appointment status, and academic unit information.

2. Complete the **Leave Details** section, starting with the selection of a leave type from the **Type of Leave** drop-down menu. All mandatory fields will be marked with an asterisk.
   NOTE: if you select Sabbatical or Extended Sabbatical/Study as your leave type you will see both Start Date 1/End Date 1 and Start Date 2/End Date 2 appear; this is to accommodate *split sabbaticals*.

The leave request form is dynamic in that depending upon the Type of Leave you select, different sections and fields will appear on the page. Given this, the procedure for completing and submitting the leave request will vary slightly depending on the type of leave selected.
   - If the leave type that you've selected causes an additional section to appear under the Leave Details section, complete the mandatory fields of that section (denoted by an asterisk) and proceed to step 3.
   - If the leave type selected does not produce a section following Leave Details, simply proceed to step 3.

3. If you are satisfied with the data you have entered you can click the **Save Leave Request** button and your input will be *saved* (but not yet *submitted* for review). Clicking the **Reset** button will clear all fields so that you can re-enter revised data if desired. Also note that once you do save your input, the page will refresh and a new button (**Delete Leave Request**) will appear. This will allow you delete the saved request if desired.

   - If you've chosen a leave type other than Sabbatical or Extended Sabbatical, proceed to **Entering a Decision** (page 9)
   - If you've chosen Sabbatical or Extended Sabbatical as your leave type, proceed to step 4 (page 6).

4. After clicking the **Save Leave Request** button you will notice that a new section (**Associated Documents – Sabbatical**) appears. This is the section you will use to upload documents related to your sabbatical (sabbatical plan, and sabbatical report).

Please note:
o   It is <u>not</u> mandatory that the sabbatical plan be uploaded at time of application for sabbatical. The sabbatical leave request may be submitted without the sabbatical plan, and the plan may be added by the applicant at a later date, *however, it must be uploaded no later than three months before the start date of the requested leave*.
o   Sabbatical plans are submitted *before* the start of the leave, and sabbatical reports are submitted once the leave is complete.

If your sabbatical plan is not prepared at time of application for sabbatical and your intention is to upload the plan at a later date, go directly to **Entering a Decision** (page 9).

If you are prepared to upload your sabbatical plan at this time, proceed to **<u>Uploading Sabbatical Documents</u>** on the following page.

Uploading Sabbatical Documents

Please note that your sabbatical plan/report must be saved in pdf format

In the **Associated Documents – Sabbatical** section of the sabbatical leave request form, click the **Manage Sabbatical Documents** button:

Associated Documents -- Sabbatical

Instructions
1. Sabbatical plans are uploaded here.
2. Please note the sabbatical plan is submitted before the leave and the sabbatical report is submitted after the leave.
3. Please note that sabbatical leave dates must be submitted no later than Oct 31. Sabbatical plans may be submitted separate through the system at least six months prior to the start of the leave and no later than three months prior.

Manage Sabbatical Documents

Document	Date	
There are no attached documents associated with this transaction.		

This will cause the **Document Upload** page to open:

Document Upload   101058159 FCM Leaves Tester2
                                                                                 Jul 07, 2016 03:59 pm

Leave Request Page Doc ID: 331

Step 1 - Uploading Documents

Documents you upload are held in a staging area to ensure they are safe to move into our Document Management system. You can upload, view and delete documents while they are in this staging area. Once you are satisfied with the documents you uploaded, you may "finalize" them by clicking the "Confirm Upload" button (Step 2 below)

Document Type   Sabbatical Plan ▼
Select Document: Choose File   No file chosen

Upload Document

Step 2 - Finalizing Documents

Move your documents into the Document Management System (BDM) by clicking the "Confirm Upload" button.

File name	Document Type	Upload Date	Action
There are no staged documents associated with this transaction.			

Return to Leave Details Page

Document upload is a two-step process:
Step 1:
o   Select Sabbatical Plan or Sabbatical Report from the **Document Type** drop-down menu, then click the **Choose File** button to search for your document. Again, the document must be saved as a pdf file.
o   Once you have located and selected your document, click the **Upload Document** button. "…Processing…" will appear on screen for a few seconds as the system uploads the document. Once the initial upload is complete, a confirmation message reading "The file has been successfully uploaded" will appear at the top of the page.
o   Under **File name** on the lower left of the screen you'll notice a link to the document that you just uploaded. If you click on this link you can review the document, and if for any reason you are not satisfied with the document, you can at this point remove it from the leave request by clicking the **Delete** button:
Step 2:
o   If you are satisfied with the document, click the **Confirm Upload** button:

Step 2 - Finalizing Documents

Move your documents into the Document Management System (BDM) by clicking the "Confirm Upload" button.

File name	Document Type	Upload Date	Action
sabbatical_plan3.pdf	Sabbatical Plan	07-JUL-2016 16:06:35	Confirm Upload Delete

Return to Leave Details Page

"…Processing…" will again appear on screen for a few seconds while the upload completes. Once step 2 of the upload is complete, a confirmation message reading "The file has been successfully stored in the Document Management System" will appear at the top of the page. Click the **Return to Leave Details Page** button to return to the main leave application page.

If you are uploading your plan *at the same time* as you are submitting your sabbatical request: go directly to **Entering a Decision** (page 9) to complete your application.

If you are uploading your plan *after* having already submitted your sabbatical request: to exit the main leave application page, click the Return to Leave Review Launch page link (in the upper left of the page), or the EXIT link in the upper right to exit Carleton Central

Entering a Decision

Now that all the details of your leave request have been populated and you are satisfied with the data you've entered, it is time to forward the request for review. This is done in the final section of the leaves application form, the **Enter Decision** section:
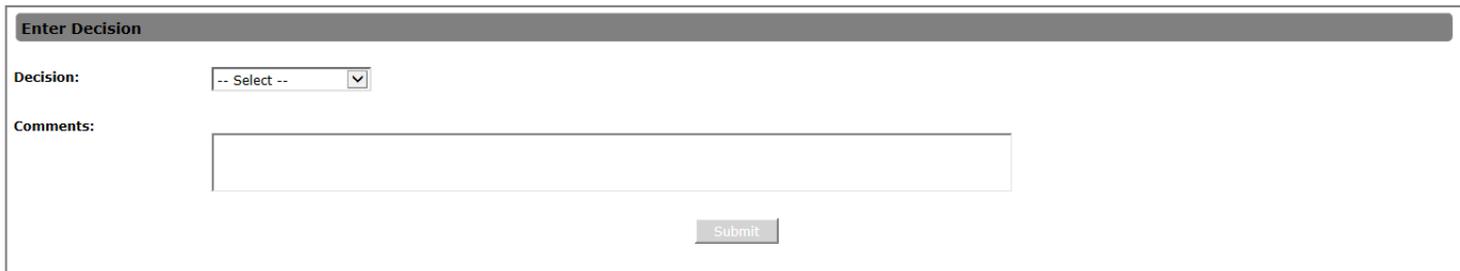
Enter Decision	
Decision:	-- Select -- ▾
Comments:	[ ]
	Submit

1. Select "Submit online form for Approval" from the **Decision** drop-down menu; once you do this the **Submit** button will become active (become red)
2. Optional: enter comments in the **Comments** box
3. Click the **Submit** button; the system will forward your leave request to the next level of reviewer for review, and will, by way of email, notify them that they have a leave request to review.

After hitting the Submit button you will be returned to your launch page where you should see your newly-submitted leave request with the Status of **Reviewed**.

The applicant will be informed of the outcome of the leave request (once the Provost makes a decision) by way of email notification, and can check on where the request sits in the reviewer queue by checking the **Reviewer Level** on their Leaves launch page.

Canceling a Leave Request

Applicants may cancel leave requests that have not yet been approved by the Provost, as well as leave requests that have received final approval (providing the start date for these approved leaves has not yet arrived). However, each of these is done in a different way:

To cancel a leave request that has not yet been approved by the Provost:

1. Access your leaves request launch page via Carleton Central
2. Locate the leave request ID that you want to cancel and click the **Review** button on the far right; this will open the leave request form.
3. Scroll to the bottom of the form to the Decision drop-down menu and select **Cancel Leave**. The system requires the applicant to enter, in the Comments field, an explanation or reason for the cancellation.
4. Click the Submit button. The leave request will be cancelled, and any reviewers who have already reviewed and submitted a decision on the request will receive email notification that you have chosen to cancel the leave.

After hitting the Submit button you will be returned to your launch page where you should see your newly-submitted leave request with the Status of **Cancelled**.

To cancel a leave request that has already been approved by the Provost:

1. Access your leaves request launch page via Carleton Central
2. At the bottom of the launch page, click the red **Cancel Leave Approved by the Provost** button. This will refresh your launch page so that only leaves that have been received final approval will appear.
3. Locate the leave request ID that you want to cancel and click the **Cancel** button on the far right; this will open the Leave Change Request form.

Requests to cancel leaves that have already received final approval generate a new request (a Leave *Change* Request) that goes through the same chain of reviewers as the initial leave request. Note that a new LCR (Leave Change Request) ID number appears in the upper left of the form, along with the ID number of the corresponding leave request (clicking the red ID number of the corresponding leave request will take you to that leave request if you wish to view it).

4. Enter the reason that you are cancelling your leave in the **Reason for Change** field, then click the **Save Request** button to save, or **Reset** to clear the field if needed.
5. In the **Enter Decision** section, in the Decision drop-down menu, select **Submit online form for Approval**.
6. Optional: enter comments in the **Comments** box
7. Click the red **Submit** button; the system will forward your leave change request to the next level of reviewer for review, and will, by way of email, notify them that they have a leave change request to review.

After hitting the Submit button you will be returned to your launch page. Your newly-submitted leave change request will appear on your launch page as a **Request to Cancel** (under the **Request Type** column) with the Status of **In Progress**. The corresponding leave request will have a revised status of **Locked – Change Request in progress**.

The applicant will be informed of the outcome of the request to cancel (once the Provost makes a decision) by way of email notification, and can see where the request sits in the reviewer queue by checking the **Reviewer Level** for the request on their Leaves launch page.

Postponing a Leave Request

Only sabbatical requests that have been approved by the Provost can be postponed. For all other submitted leave types for which the applicant would like to change the start date, the leave must be cancelled and a new leave request with the revised dates must be submitted.

To postpone a sabbatical request that has already been approved by the Provost:

1. Access your leaves request launch page via Carleton Central
2. At the bottom of the launch page, click the red **Postpone a Leave Approved by the Provost** button. This will refresh your launch page so that only fully approved sabbaticals will appear.
3. Locate the leave request ID that you want to postpone and click the **Postpone** button on the far right; this will open the Leave Change Request form.

Requests to postpone sabbaticals approved by the Provost generate a new request (a Leave *Change* Request) that goes through the same chain of reviewers as the initial sabbatical request. Note that a new LCR (Leave Change Request) ID number appears in the upper left of the form, along with the ID number of the corresponding sabbatical request (clicking the red ID number of the corresponding leave request will take you to that leave request if you wish to view it).

4. Enter the desired start and end dates in the **Revised Start Date** and **Revised End Date** fields, and the reason that you are postponing your sabbatical in the **Reason for Change** field.
5. Click the **Save Request** button to save all data, or **Reset** to clear all fields if needed.
6. Optional: enter comments in the **Comments** box.
7. Click the red **Submit** button; the system will forward your leave change request to the next level of reviewer for review, and will, by way of email, notify them that they have a leave change request to review.

After hitting the Submit button you will be returned to your launch page. Your newly-submitted leave change request will appear on your launch page as a **Request to Postpone** (under the **Request Type** column) with the Status of **In Progress**. The corresponding sabbatical request will have a revised status of **Locked – Change Request in progress**.

The applicant will be informed of the outcome of the request to postpone (once the Provost makes a decision) by way of email notification, and can see where the request sits in the reviewer queue by checking the **Reviewer Level** for the request on their Leaves launch page.

Responding to a Request to Delay Sabbatical

The Dean and University Librarian have the ability, once a sabbatical request reaches them, to initiate a request for the applicant to delay the start date of his or her sabbatical leave for a period of time. If a request to delay is initiated on a sabbatical request that you have submitted you will be notified by way of email:

You have a leave request to review. To do this, please go to Carleton Central
https://central.carleton.ca/prod/twbkwbis.P_GenMenu?name=homepage

Click on the Faculty Services tab -> Faculty Affairs - Submit Sabbatical and Other Leave Requests. You will be taken to a page with a summary list of leaves requiring approval then select **58**.

Leave Request Details:

Dean-UL has submitted **Leave Delay Request** ID = **58**
Related Leave ID: *331*
Applicant Name: *Faculty Leaves Tester*
Banner ID: *1010…..*
Position Number(s): *79….*
Leave Type: *Sabbatical*
New Proposed From Date (YYYY/MM/DD): *2017/07/04*
New Proposed To Date (YYYY/MM/DD): *2018/06/30*
Credits Towards Future Sabbatical (if applicable): *1*
% Increase for Stipend (if applicable): *4*
Reviewed By: *Reviewer Name*
Comments: *please delay sabbatical start date!*

Note that the fact that this is a Leave *Delay Request* is bolded, as is the delay request ID number.

To take action on a request to delay sabbatical:

1. Access your leaves request launch page via Carleton Central.
2. Locate the request to delay ID number indicated in the email notification, confirming that the number corresponds to a **Delay Request** (see **Request Type** column on the launch page).
3. Click the **Review** button on the far right; this will open the delay request form.

There is no data for the applicant to enter on the request to delay form. The applicant simply reviews the data the Dean or UL has entered into the **Leave Details** section, then enter their decision

4. After reviewing the **Leave Details** section, go to the Decision drop-down menu in the **Enter Decision** section at the bottom of the form. The applicant has the option to Accept the terms of the requests to delay, Not Accept the terms, or to Return to Dean/UL for correction:
    *   Accept: the delay request is forwarded to the Manager of faculty Affairs for review
    *   Not Accept: the delay request is terminated
    *   Return for Correction: the delay request is sent back to the Dean/UL. On return for corrections, it is mandatory to enter comments explaining why the delay request is being returned.
5. After selecting a decision option, click the red **Submit** button; the applicant will be taken back to the launch page.