

Bereavement Leave Workshop Time and Leave Administration

Workshop Outline

- I. Purpose of the Workshop
- II. Bereavement Leave Policy Highlights
- III. Bereavement Leave Scenarios

Purpose of the Workshop



This workshop is designed to promote accurate use of bereavement leave and to ensure that agencies maintain the integrity of the benefit in the HR Payroll System.

Introduction to Bereavement Leave

Bereavement Leave is for a loss of an immediate family member or colleague.

The executive Order was issued November 1, 2024; however, it was retroactively applied to cover losses that were experienced for the period of September 27th through October 31, 2024.

Executive Order 325 - Bereavement Leave - provides paid leave for eligible state employees for the loss of an immediate family member and the loss of a colleague.

The Executive Order 325 applies to:

Cabinet Agencies,
and

Other state agencies or
universities who
voluntarily adopt the
Executive Order

Eligibility Requirements

Eligible employees – full-time, part-time (half time or more), in a permanent, probationary, or time-limited position and

- In a cabinet agency or a non-cabinet agency who opt-in to offer bereavement leave

Approval is subject to the supervisor

Not eligible – employees in non-cabinet agencies that do not opt-in to offer bereavement leave, and Temporary employees, contractors, and interns

Bereavement Leave Usage and Amounts

Immediate Family

- Bereavement Leave may be used for the loss of an immediate family member (definitions are on the next slide)
- Up to 40 hours
 - Prorated for part-time employees
- Use within 180 days of death
 - Does not have to be used on consecutive days
 - If not used within the event period, the time will forfeit
- Multiple losses apply

Colleague

- Bereavement Leave may be used for the loss of a colleague to attend a funeral, or memorial event
- Up to 8 hours, including travel
 - Prorated for part-time employees
- Must have worked in the current agency, and
- Must have worked with the employee within one year of their passing

Definition of Immediate Family

Spouse	Parent	Child	Sibling	Grand/Great	Dependents
Husband Wife	Biological Adoptive Step Loco Parentis* In-law	Biological Adoptive Foster Step Legal Ward Loco Parentis* In-law	Biological Adoptive Step Half In-law	Parent Child Step In-law	Living in the employee's household

* A person who is in the position or place of a parent

HR Responsibilities

HR is responsible for:

- Educating managers and employees on bereavement leave.
- Tracking leave usage which includes transfers between agencies
- Non-cabinet agencies that are not in the HR Payroll System will need to provide their agency **report** to OSHR by **September 1st each year**
- **Best practice:**
 - Maintain documentation of loss
 - Maintain usage data in HR Payroll System



Required Documentation

Acceptable documentation for loss of an **immediate family**:

- Death certificate, obituary, or funeral notice

Acceptable documentation for loss of a **colleague**

- Proof of funeral or memorial event



Bereavement Leave – Family Best Practices

Ensure that the employee's loss aligns with policy

Request documentation of the loss

- Be sympathetic and allow the employee time to provide documentation

HR Payroll System:

• **9250** is the absence code for **Bereavement Leave-Family**

- The time record should indicate
 - ❖ Approved by manager and
 - ❖ Reason for use in the long text field - "management approved – mother, sister, loss, etc."

• Ensure that time approvers are not approving bereavement leave without verification of approval and text entered in the record.



Bereavement Leave - Colleague (Other) Best Practices

Ensure that the loss aligns with policy

Did the employee work at the current agency with the colleague within one year of their passing?

Request documentation of the funeral or memorial event

HR Payroll System:

• **9255** is the absence code for **BL-Other (Colleague)**

- The time record should indicate
 - ❖ Approved by manager in the long text field

• Ensure that time approvers are not approving bereavement leave without verification of approval and text entered in the record.



Bereavement Leave Reports Best Practices



- It is necessary to conduct periodic audits of employee leave records

- **Monitor bereavement leave usage monthly**

- Run B0058 from January – current
- Export to Excel, insert a pivot table, filter by BL type
 - ❖ Analyze the report
- Research patterns of use
 - ❖ Trends of extensive bereavement leave usage
 - ❖ Records without long text (comments) should be updated

Scenario 1

Brown is a full-time, permanent employee at a cabinet agency. He lived with his fiancé; she passed away on May 1, 2025.

He requested bereavement leave - immediate family due to the recent loss of his fiancé.

1. Is Brown eligible for bereavement leave?
2. What other leave options are available for Brown?

Scenario 2

Brooklyn is full-time probationary at a non-cabinet agency.

She requested bereavement leave to attend her grandmother's memorial; she loss her grandmother two months ago.

She has not used any bereavement leave this year.

1. Is Brooklyn eligible for bereavement leave to attend her grandmother's memorial?
2. How much leave is she eligible for?
3. What other leave options are available for Brooklyn?

Scenario 3

September is a part-time (greater than 19 hours), time-limited employee at a cabinet agency.

She requested bereavement leave for the loss of her adopted brother but cannot provide documentation immediately.

1. Is September eligible for bereavement leave?
2. Explain your answer

HR Payroll System Scenario 4

Review the report and provide an analysis of the data:

1. What red flags do you see?

Att/Abs Type	9255 : Bereavement Leave Other
Employees	Sum of Hours
Agency Name	41
1234567	3
9874565	4
2345678	2
3456789	0
4567912	8
5678912	0
6789123	24



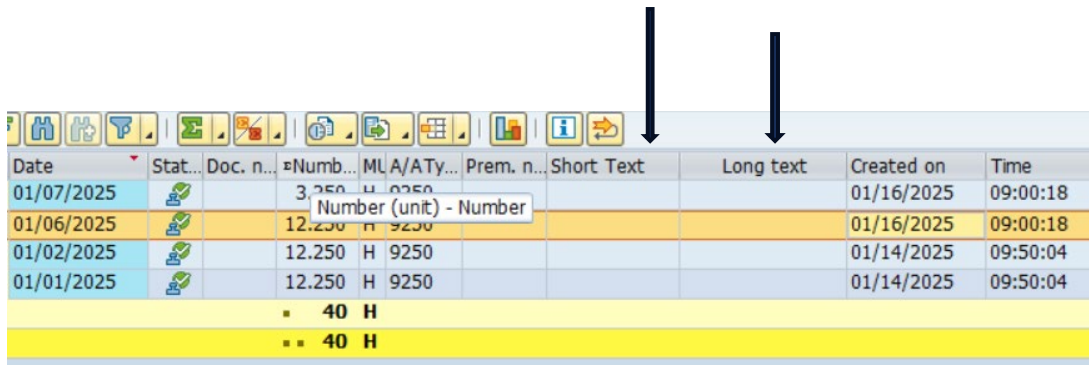
HR Payroll System Scenario 4, continued

1. What action(s) would you take?
2. What are other considerations?

Employee Name ▼	Perno ▼	Calendar Day ▼	Hours ▼	Att/Abs Type ▼	Agency Name ▼
Michael B. Jordan	6789123	4/30/2025	8	9255 : Bereavement Leave Other	Agency
Michael B. Jordan	6789123	4/29/2025	8	9255 : Bereavement Leave Other	Agency
Michael B. Jordan	6789123	4/28/2025	8	9255 : Bereavement Leave Other	Agency

HR Payroll System Scenario 5

1. What red flags do you see?
2. What action(s) would you take?



Date	Stat...	Doc. n...	#Numb...	M/A/ATy...	Prem. n...	Short Text	Long text	Created on	Time
01/07/2025			3.250	H 0250				01/16/2025	09:00:18
01/06/2025			12.250	H 9250				01/16/2025	09:00:18
01/02/2025			12.250	H 9250				01/14/2025	09:50:04
01/01/2025			12.250	H 9250				01/14/2025	09:50:04
▪ 40 H									
▪ 40 H									

Report Scenario 6

1. What red flags do you see?
2. What action(s) would you take?

Employee Name	Perno	Calendar Day	Hours	Att/Abs Type	Agency
Katy Perry	1234567	4/25/2025	8	9250 : Bereavement Leave Family	Agency
Katy Perry	1234567	4/24/2025	8	9250 : Bereavement Leave Family	Agency
Katy Perry	1234567	4/23/2025	8	9250 : Bereavement Leave Family	Agency
Katy Perry	1234567	4/22/2025	8	9250 : Bereavement Leave Family	Agency
Katy Perry	1234567	4/21/2025	8	9250 : Bereavement Leave Family	Agency
Katy Perry	1234567	2/5/2025	8	9250 : Bereavement Leave Family	Agency
Katy Perry	1234567	2/4/2025	8	9250 : Bereavement Leave Family	Agency
Katy Perry	1234567	2/3/2025	8	9250 : Bereavement Leave Family	Agency
Katy Perry	1234567	1/31/2025	8	9250 : Bereavement Leave Family	Agency
Katy Perry	1234567	1/30/2025	8	9250 : Bereavement Leave Family	Agency



Monitoring Report Email

The Bereavement Leave Policy – Executive Order 325 indicates that eligible employees may use up to **40 hours for the loss of immediate family** and/or 8 hours to attend a memorial or funeral event for a colleague. OSHR has identified employees whose bereavement leave usage appears to conflict with policy.

Your assistance is needed to confirm if the bereavement leave usage is consistent with policy and was approved by management. If so, **please update the time record to state the reason (long text field) for use; for example, “management approved – mother, sister, etc.” for bereavement leave - immediate family 9250** or “documentation provided and approved by management” for bereavement leave other 9255, see the FAQs for bereavement leave for text related to using the leave. Please do not enter any HIPPA data in the HRPS. If usage is not consistent with policy and not approved by management, please make the necessary corrections to replace bereavement leave with an appropriate leave type or leave without pay if applicable. We kindly request advisement to OSHR by **MM DD, YYYY**, of the steps taken by the agency to update and resolve the absence code(s) for the applicable employee(s).

It is recommended that your agency develop an internal process for monitoring the use of bereavement leave. The Business Objects report B0058 CATS Time Data by Employee Report is a good tool for this purpose, along with using TM-48 and TM-35 for instructions on how to enter long text on a selected row on the timesheet in the HRPS.

Other Limitations



Bereavement Leave:

- Has no cash value
- It may be transferred from one participating agency to another participating agency
 - May not be transferred to a non-participating agency
- Not payable at separation
- Cannot be applied to negative leave balances
- Cannot be donated for voluntary shared leave

Falsification of documentation is grounds for dismissal

Reporting

The annual bereavement leave usage report is due to OSHR by September 1st

- Agencies that do not use the HR Payroll System are responsible for submitting the agency report to OSHR
- OSHR will provide a template
- OSHR will extract reports for all agencies that use the HR Payroll System.

The 1st annual bereavement leave report period is September 27, 2024, through June 30, 2025

Maintaining the integrity of bereavement leave in the HR Payroll System ensures that data is reliable and ready for the annual report, or any subsequent report that may be requested.

The bereavement leave report will be submitted to the Governor's Office.



Questions and Answers

