Processing Leave of Absence in Workday
Covered Topics:

- Why LOA Events and Benefit Impacts
- Best Practices
- Processing Leave of Absence Events
  - 7 day increment
  - Multiple LOA Events
  - Documentation
  - LOA Extensions
- Trouble shooting
LOA Event and Benefits
Why Enter Leave of Absence Events in Workday?

- The LOA event will trigger a Benefit event in Workday.
  - Capturing the LOA event solely on the timesheet will not trigger a Benefit event.

- Aids in communications with other HRCS and timekeepers – indicates event is approved (paperwork completed outside of Workday)

- Centralizes documentation of the LOA event in Workday – needed by EBD.
Important Dates to Remember

**DBM & DoIT**
- Sept 11, 2017 Benefits Go Live
- Oct 3, 2017: Open Enrollment done directly in Workday
- Jan 1, 2018: Life Event Changes

**All Other Agencies**
- October 2017: Open Enrollment Done Outside of Workday
  - Jan 1, 2018: All Other Agencies - Leave of Absence Events for Parallel Testing until Dec 31, 2018
- Jan 1, 2019: Benefits Go Live
Best Practices
Agency Develops Internal Process to Maintain Data

To prevent delays with Benefit events, etc., the agency should develop an internal process for their managers to maintain communication with HR.

- Train Supervisors and Managers
  - Create a “Cheat Sheet” for managers of HR Personnel to contact regarding employee changes
  - Example: Notify HR staff of FMLA events, hires, terms, etc.

- Include data validation as part of a weekly or monthly maintenance
  - Example: Use SPMS Current Employee Detail report for missing or incorrect data
  - Use other reports if necessary
Suggested Processes Outside of Workday

- **Best Practice #1 – Eliminate backdating of new hires**
  - New hires should be processed prior to their start date, not entered after the employee’s first day of work.

- **Best Practice #2 – Start new employees at the beginning of a pay period whenever possible**
  - Starting a new employee at the beginning of a pay period is the best way to ensure that an employee has a full 60 days to make benefits selections.

- **Best Practice #3 – Eliminate backdated terminations**
  - When an employee provides notice of his or her intention to separate from State service, the termination event should be processed. It shouldn’t be processed later than the employee’s last day on payroll.

- **Best Practice #4 – Refrain from processing HR transactions during the “dead zone”**
  - The “dead zone” is the *last five calendar days of a pay period*. When HR transactions that affect pay are processed during the dead zone, *employees may not be paid in a timely fashion.*
Best Practice #5 – Ensure that supervisors and managers are timely notifying HR of employee events
- There are many events that must be timely reported to HR, including: if an employee is out for three or more days or has an upcoming surgery or birth, if an employee is going to be in a “without pay” status for any reason and if the employee is placed on a disciplinary suspension or is directed to forfeit leave as a result of a disciplinary action. (Manager resource materials with when and who to contact may be used to help with this issue.)

Best Practice #6 – Ensure that contractual start and end dates are audited regularly
- Failure to do so will impact an employee’s pay, leave, and benefits, if applicable.
Suggested Processes Outside of Workday (cont.)

- **Best Practice #7 – Ensure that employee and HR fields are not missing data**
  - Every single time an employee is placed in a PIN and before recruitment, HR staff must review, at a minimum, the following:
    - Compensation of the employee
    - Costing allocation
    - FTE percentage employed
    - Job Details tab: Pay rate type and the other data fields
    - Organizational Assignment: retirement code, check distribution code (if applicable), bargaining status, service category and appointment designation, funding information and percentage employed.
  
  - Capturing employee data should be part of the HR process such as:
    - home address
    - work and home telephone numbers
    - work location

  *Failure to ensure that all of this critical information is present and correct may affect benefits administration.*
Processing Leave of Absence Events
LOA Process Steps

1. Follow agency procedures to obtain approved Leave paperwork.

2. Use the **Leave of Absence and Corresponding Time Off Codes** chart (*indicates which use 7 day increments*)
   - Determine if LOA is paid or unpaid
   - Determine type of Leave Event
   - Enter event in Workday

3. Communicate to manager, employee and timekeeper/payroll regarding the LOA event and time off codes to use on the timesheet if applicable.

4. Follow agency procedures to obtain approved Return to work paperwork.

5. Enter the Return from Leave event in Workday

6. Communicate to manager, employee and timekeeper/payroll
The HRC will refer to the Leave of Absence and Corresponding Time Off Codes chart located on the SPS Website before processing any LOA event in Workday. The chart provides Workday instructions for the HRC and timesheet coding for the timekeepers, employee and manager.

<table>
<thead>
<tr>
<th>Leave Type Description</th>
<th>Leave Type</th>
<th>Intermittent/Continuous</th>
<th>Paid or Unpaid</th>
<th>7 Day Increment Yes/No</th>
<th>Workday Instructions</th>
<th>Time Sheet Coding: Corresponding Time Off Codes when Date Range Has Been Entered by HR</th>
<th>Time Sheet Coding: Corresponding Time Off Codes when Date Range is NOT Entered by HR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leave that is granted to an employee who is an organ or bone marrow donor. Amount of Leave: In any 12-month period, employees may use up to 7 days of organ donation leave to serve as an organ donor. Employee must contact their human resources office to apply.</td>
<td>Bone Marrow Donation</td>
<td>Continuous</td>
<td>Paid</td>
<td>Yes</td>
<td>Use: Paid Bone Marrow Donation</td>
<td>Leave the timesheet blank</td>
<td>Use: Bone Marrow</td>
</tr>
<tr>
<td>Leave that is granted to an employee who is an organ or bone marrow donor. Amount of Leave: In any 12-month period, employees may use up to 7 days of organ donation leave to serve as an organ donor. Employee must contact their human resources office to apply.</td>
<td>Bone Marrow Donation</td>
<td>Intermittent</td>
<td>Paid</td>
<td>No</td>
<td>Use: Paid Intermittent Time Off Approval Range</td>
<td>*Place a note in the Comments section of the actual approved leave dates. Refer to Leave 7 Day Increment Requirements job aid for further instructions.</td>
<td>Use: Bone Marrow</td>
</tr>
</tbody>
</table>
Leave of Absence Overview

**Paid**
- Bone Marrow Donation
- Disaster Service
- FMLA
- FMLA for Service Member
- IWIF Approved Accident
- Military
- Organ Donation
- Public Health

**Unpaid** *Trigger Benefits Event*
- Armed Services (30 Days or Less)
- Armed Services (31 Days or More) *Do Not Use*
- FMLA
- FMLA for Service Member
- Medical Leave
- Military Administration
- Personal
- Suspension
- Temp Total Disability
In preparation for the Benefits Go Live on 1/1/2019, DBM SSD and EBD will test Benefits module throughout 2018. There will be extra steps after the LOA event has been approved by the HR Partner. NOTE: The LOA event is still considered “Successfully Completed” after the HR Partner approves it.

Agency Benefits Coordinator will continue with the current process. The HRC will upload supporting documentation in Workday.

DBM SSD and EBD will process the remaining steps during the parallel testing.
Parallel Testing – 1/1/2018 to 12/31/2018

- Change Benefits Election: DBM SSD (Parallel Test EE on Self)
- Change Benefits Election: Central Benefits Partner
Place Worker on Leave Page – Leave Impact

To place an employee on Leave of Absence:
1. Search for the employee.
2. Click the Related Actions and Preview button
3. Go to Time and Leave > Place Worker on Leave

Workday will indicate the impacts that the LOA event will have.
Leave of Absence: 7 Day Increment
7 Day Increments Explained

Why does Workday require that for some LOA events that the dates are entered in 7 day increments?

- Workday only knows that employees work 40 hours a week within a 7 day period. It does not know which days of the week the employee works.
- Individual work schedules are not loaded into Workday because they cannot be maintained once loaded.
- When a person is placed on a LOA event that has an entitlement bucket, Workday can track it on a weekly or 7 day increment only.
7 Day Increments - Example

Example: Lucy van Pelt requested FMLA from Wednesday, December 13, 2017 to Tuesday, December 19, 2017. She is scheduled to work Monday through Friday for 8 hours a day. **Total FMLA used should be 40 hours.**

**Without 7 Day Increment Validation**
FMLA used: 56 hours

**With 7 Day Increment Validation**
FMLA used: 40 hours
7 Day Increments Red Alert – Leave of Absence Page

If the LOA event requires the date range be in 7 day format, then you will receive a Red Alert message. Click on the message to read it.

- Click the Revise button to update the dates.
7 Day Increments Red Alert – Return Worker from Leave Page

If the LOA event required the dates to be in 7 day increments, then the same guidelines must be followed when returning the employee from the leave.

On the Return Worker from Leave page, Workday will display the Error message in two locations.
Multiple LOA Events and Returning Worker from Leave
Multiple LOA Events for an Employee

- An employee can have multiple LOA events at one time.
- However, only one Return Worker from Leave event can be associated with a LOA event.
- If there are multiple LOA events, then **de-select** the other events on the Return Worker from Leave page.

**IMPORTANT:** Each LOA event has its own separate Return from Leave event.
Supporting Documentation
Supporting Documentation for LOA Events

EBD (Employee Benefits Division at DBM) requires that for certain LOA events that supporting documentation is attached to the LOA event in Workday.

Coordinate with your Agency Benefits Coordinator to determine which documents are sent to the BAS system related to LOA, and upload that document in Workday.

- Attach documents during Place Worker on Leave event
- Attach documents on the Worker History > Maintain Employee Documents page.
Upload Supporting Documentation: Place Worker on Leave Page

Click the **Supporting Documents** tab

Click the Plus icon

Click the Attach button
Upload Supporting Documentation: Worker History > Maintain Employee Documents

Click the Add button.

Click the Select Files button.
Extending Leave of Absence Events
Paid LOA Extension

- The process for extending a Paid LOA event remains the same. (See note #6 on the Leave of Absence and Corresponding Time Off Codes chart.)

6. Extending a PAID LOA event: If the extension is for a PAID LOA event, then complete a Return from Leave event to close the first LOA event. Enter a note in the Comments section explaining the employee has not returned, but that the LOA is being extended. Then enter a second Paid LOA event using the same date as the Return from Leave date. Example: First LOA event is from 1/2/2017 to 1/9/2017. The Return from Leave date would be 1/10/2017. Then the second LOA date would also begin on 1/10/2017.
Unpaid LOA Extension – New Process

DO NOT complete a return from leave event and enter a second LOA event to extend an unpaid LOA event.

- Returning the employee to close the first unpaid LOA event, and/or entering a second unpaid LOA event, or rescinding the unpaid LOA event will negatively impact an employee’s benefits eligibility.

- Once an unpaid LOA event is entered in Workday, do not make any changes or corrections to the event.

- Extending an unpaid LOA or any corrections needs to be corrected by DBM Shared Services.
  - Submit a ticket to SPS Shared Services Support ticketing system at: http://spshelp.dbm.md.gov/login/create_request#/ticket-form/20341
Extending LOA Event: Paid vs. Unpaid

Paid LOA Event

Follow Note #6 on the Leave of Absence and Corresponding Time Off Codes Chart

Unpaid LOA Event

Follow Note #5 on the Leave of Absence and Corresponding Time Off Codes Chart

6. Extending a PAID LOA event: If the extension is for a PAID LOA event, then complete a Return from Leave event to close the first LOA event. Enter a note in the Comments section explaining the employee has not returned, but that the LOA is being extended. Then enter a second Paid LOA event using the same date as the Return from Leave date. Example: First LOA event is from 1/2/2017 to 1/9/2017. The Return from Leave date would be 1/10/2017. Then the second LOA date would also begin on 1/10/2017.

5. Extending an UNPAID LOA event: If an employee has not returned from a continuous UNPAID LOA event and the UNPAID LOA needs to be extended, please submit a ticket to the SPS Shared Services Support to correct the dates on the initial LOA event.
LOA Troubleshooting
Viewing Current LOA Information

View LOA information on the employee’s Worker Profile.

Go to **Time Off tab > Time Off and Leave Requests sub-tab**

View LOA info including:
- LOA leave type
- Last Day of Work
- First Day of Leave
- Estimated Last Day of Leave
- Actual Last Day of Leave (if employee returned to work)

View approved Time Off entered from timesheet or Time Off Calendar.
Viewing Leave Balances

View current time off balances or view as of a specific period you define.

- **Current Balances:** From related actions, go to *Time and Leave* > *View Time Off* > *Time off Balances as a Current Date*

- **Balances as of a Specific Date:** From related actions, go to *Time and Leave* > *View Time Off Balances*

### Viewing Leave Balances Table

<table>
<thead>
<tr>
<th>Time Off Plan</th>
<th>Unit of Time</th>
<th>Beginning Year Balance</th>
<th>Carryover Balance</th>
<th>Accrued Year To Date</th>
<th>Time Off Paid Year To Date</th>
<th>Beginning Period Balance</th>
<th>Accrued in Period</th>
<th>Time Off Paid in Period</th>
<th>Carryover Forfeited in Period</th>
<th>Ending Period Balance Including Pending Events</th>
<th>As of Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Leave</td>
<td>Hours</td>
<td>307.6</td>
<td>189.94</td>
<td>2</td>
<td>495.54</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>495.54</td>
<td>12/09/2015 - 12/22/2015 (Bi-Weekly Regular)</td>
</tr>
<tr>
<td>Annual Leave Time Off Termination Payout Plan</td>
<td>Hours</td>
<td>307.6</td>
<td>187.94</td>
<td>0</td>
<td>495.54</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>495.54</td>
</tr>
<tr>
<td>Compensatory Exempt Holiday Time</td>
<td>Hours</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Compensatory Time</td>
<td>Hours</td>
<td>0</td>
<td>0</td>
<td>51.5</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>51.5</td>
<td>12/09/2015 - 12/22/2015 (Bi-Weekly Regular)</td>
</tr>
</tbody>
</table>
- View leave of absence details for an employee by leave type as of a specific date you define.
- From related actions, go to *Time and Leave > View Leave Results*

<table>
<thead>
<tr>
<th>Worker</th>
<th>Miley Cyrus (On Leave) (W2121212)</th>
</tr>
</thead>
<tbody>
<tr>
<td>As Of</td>
<td>01/30/2016</td>
</tr>
<tr>
<td>Leave Type</td>
<td>FMLA (Unpaid)</td>
</tr>
</tbody>
</table>

### Leave Results for Worker

**Leave Taken Details**

<table>
<thead>
<tr>
<th>Leave Type</th>
<th>Calendar Period</th>
<th>Unit of Time</th>
<th>Total Taken</th>
<th>Outstanding Balance</th>
<th>Request</th>
<th>Type</th>
<th>Reason</th>
<th>First Day</th>
<th>Estimated Last Day</th>
<th>Actual Last Day</th>
<th>Taken</th>
<th>Requested</th>
<th>Event</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paid &gt; FMLA (Use Paid Leave)</td>
<td>01/31/2015</td>
<td>Hours</td>
<td>102.857148</td>
<td>378.142852</td>
<td>Leave</td>
<td>FMLA (Use Paid Leave)</td>
<td>Medical-Self</td>
<td>01/13/2016</td>
<td>01/26/2016</td>
<td>80.000004</td>
<td>80.000004</td>
<td></td>
<td>Successfully Completed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>01/30/2016</td>
<td></td>
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</tr>
</tbody>
</table>

Total: 102.857148 102.857148
### SPMS Workers on Leave

- **Organization:** SPS Training Division E
- **Include Pending Events:** Yes
- **Include Workers Returned from Leave:** Yes

**1 Item**

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Leave Type (Including Family)</th>
<th>Last Day of Work</th>
<th>First Day</th>
<th>Estimated Last Day</th>
<th>Actual Last Day</th>
<th>Total Days</th>
<th>All Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Martin-T</td>
<td>Matte-T</td>
<td>Paid &gt; FMLA (Use Paid Leave)</td>
<td>01/09/2018</td>
<td>01/10/2018</td>
<td>01/23/2018</td>
<td>01/23/2018</td>
<td>14 Days (estimated)</td>
<td>HR Coordinator - E20: los dates are</td>
</tr>
</tbody>
</table>
Questions?

Hmm?