



STATEWIDE PERSONNEL
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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





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LOA Event and Benefits



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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

Sep 11,
2017

Oct 3,
2017

Nov 16,
2017

Jan 1,
2018

Dec 31,
2018

Jan 1,
2019

**DBM & DoIT
Go-Live**

**Open
Enrollment**

**All Other Agencies
LOA Events
Parallel Testing**

**All Other Agencies
Benefits Go Live**



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Best Practices



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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.**



Suggested Processes Outside of Workday (cont.)

- **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.***





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Processing Leave of Absence Events



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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

Leave of Absence and Corresponding Time off Codes

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.

Leave of Absence and Corresponding Time Off Codes

The **Leave of Absence and Timesheet Time Off Time Codes Guideline** provides instructions on which time off codes to use for each Leave Type. This includes instructions on how to code the timesheet when the Leave of Absence follows the 7 Day increment.

NOTES:

- Coding the timesheet correctly will avoid double deducting from the entitlement bucket, and eliminate payroll impacts.
- Using any of the Unpaid Leave of Absence events entered by HR in Workday for a specific date range will not process any time off codes on the timesheet for that date range. Therefore, it is important that HR, Timekeeper, and manager communicate to ensure that the correct Leave of Absence is selected for the employee.
- All types of intermittent leave fall under the **Intermittent Time Off Approval Range** in Workday, and is located under Paid Leave Type category. Although it is listed under Paid Leave Type category, it does not actually decrement from any entitlement buckets. Its purpose is to document the approved intermittent date range in Workday, and to allow the employee to code the timesheet appropriately.
- Each leave of absence event entered in Workday must have a separate Return to Work event attached to it.
- 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.
- 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 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. Although the person did not actually return to work on 1/10/2017, Workday requires a Return from Leave event for each LOA event (note #4 above).

Leave Type Description	Leave Type	Intermittent/ Continuous	Paid or Unpaid	7 Day Increment Yes/No	Workday Instructions	Time Sheet Coding: <i>Corresponding Time Off Codes when Date Range Has Been Entered by HR</i>	Time Sheet Coding: <i>Corresponding Time Off Codes when Date Range is NOT Entered by HR</i>
Leave that is granted to an employee who is an organ or bone marrow donor. Amount of Leave: In any 12-month period, an employee may use up to 7 days of organ donation leave to serve as a bone marrow donor; and 30 days of organ donation leave to serve as an organ donor. Employee must contact their human resources office to apply.	Bone Marrow Donation	Continuous	Paid	Yes	Use: Paid>Bone Marrow Donation *Place a note in the Comments section of the actual approved leave dates. Refer to <u>Place Employee on Leave - 7 Day Increment Requirement</u> job aid for further instructions.	Leave the timesheet blank * Because Bone Marrow Donation is entered by HR, no time off code is required on the timesheet.	Use: Bone Marrow
Leave that is granted to an employee who is an organ or bone marrow donor. Amount of Leave: In any 12-month period, an employee may use up to 7 days of organ donation leave to serve as a bone marrow donor; and 30 days of organ donation leave to serve as an organ donor. Employee must contact their human resources office to apply.	Bone Marrow Donation	Intermittent	Paid	No	Use: Paid> Intermittent Time Off Approval Range *Place a note in the Comments section of the actual approved leave dates.	Use: Bone Marrow	N/A



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

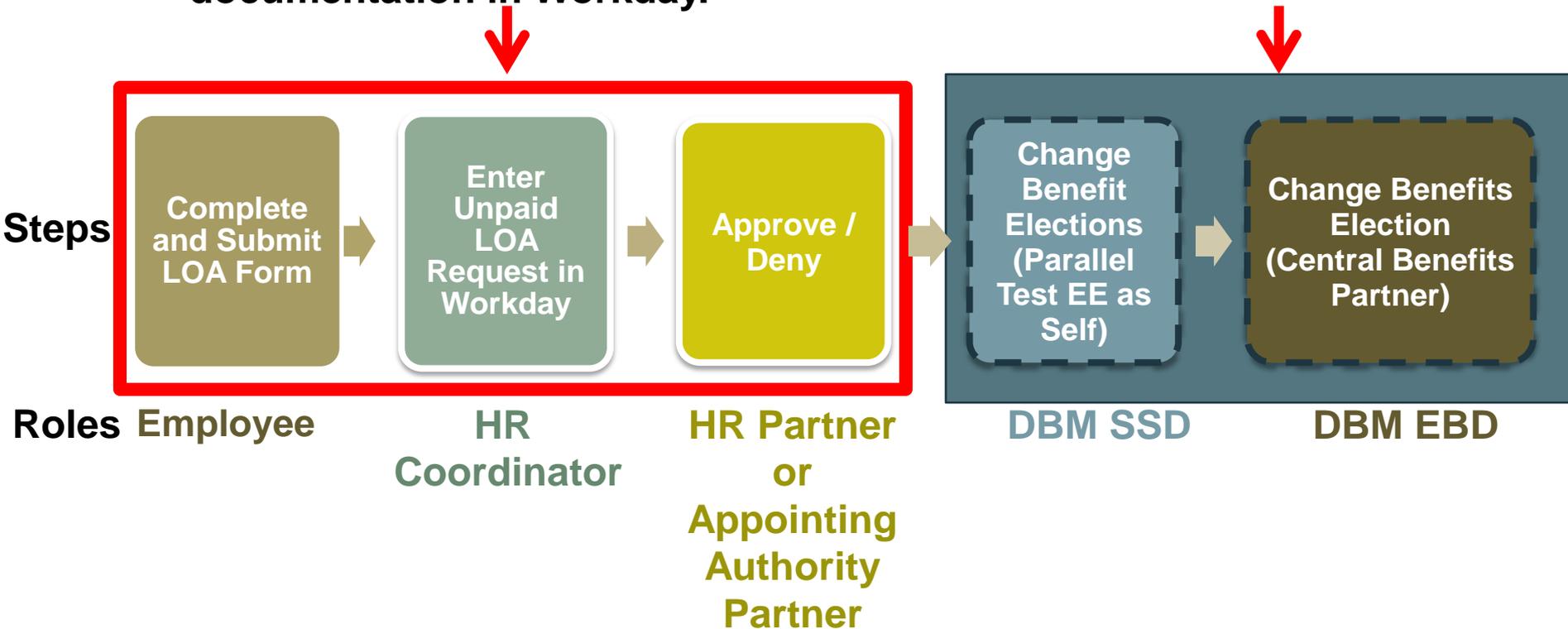


Placing an Employee on a Leave of Absence

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

Details

Process

Process History 15 items

Process	Step	Status	Completed On	Due Date	Person	Comn
Request Leave of Absence	Request Leave of Absence	Step Completed	12/06/2017 03:29:59 PM	12/13/2017	Kewl Beans (W1111111)	
Request Leave of Absence	Review Leave of Absence	Not Required		12/13/2017		
Request Leave of Absence	Approval by Appointing Authority Partner	Not Required		12/13/2017		
Request Leave of Absence	Approval by HR Partner	Approved	12/06/2017 03:30:35 PM	12/08/2017	Baked Beans (W2222222) (HR Partner)	
Request Leave of Absence	Change Benefit Elections	In Progress		12/13/2017	ASHLEY LOVETT (W2015504) (Parallel Test EE as Self)	
					Leslie Buchman (W1053021) (Parallel Test EE as Self)	
					Lisa Liedtke (W0999902)[C] (Parallel Test EE as Self)	
Request Leave of Absence	Change Benefit Elections	In Progress		12/13/2017	Dashawn Thompson (W1090188) (Central Benefits Partner)	
					Frances Melchior (W1051594) (Central Benefits Partner)	
					Kelly Valentine (W1068129) (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*

Place Worker on Leave Tom Turkey (W1111111) Actions

Last Day of Work

First Day of Leave *

Estimated Last Day of Leave *

Leave Type *

Leave Impact

Payroll Effect

Absence Accrual Effect

Benefit Effect

Supporting Documents

Workday will indicate the impacts that the LOA event will have.





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Leave of Absence: 7 Day Increment



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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



December 2017

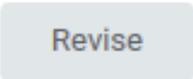
SUN	MON	TUE	WED	THU	FRI	SAT
					1	2
3	4	5	6	7	8	9
10	11	12	8 Hours FMLA	8 Hours FMLA	8 Hours FMLA	8 Hours FMLA
8 Hours FMLA	8 Hours FMLA	8 Hours FMLA	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

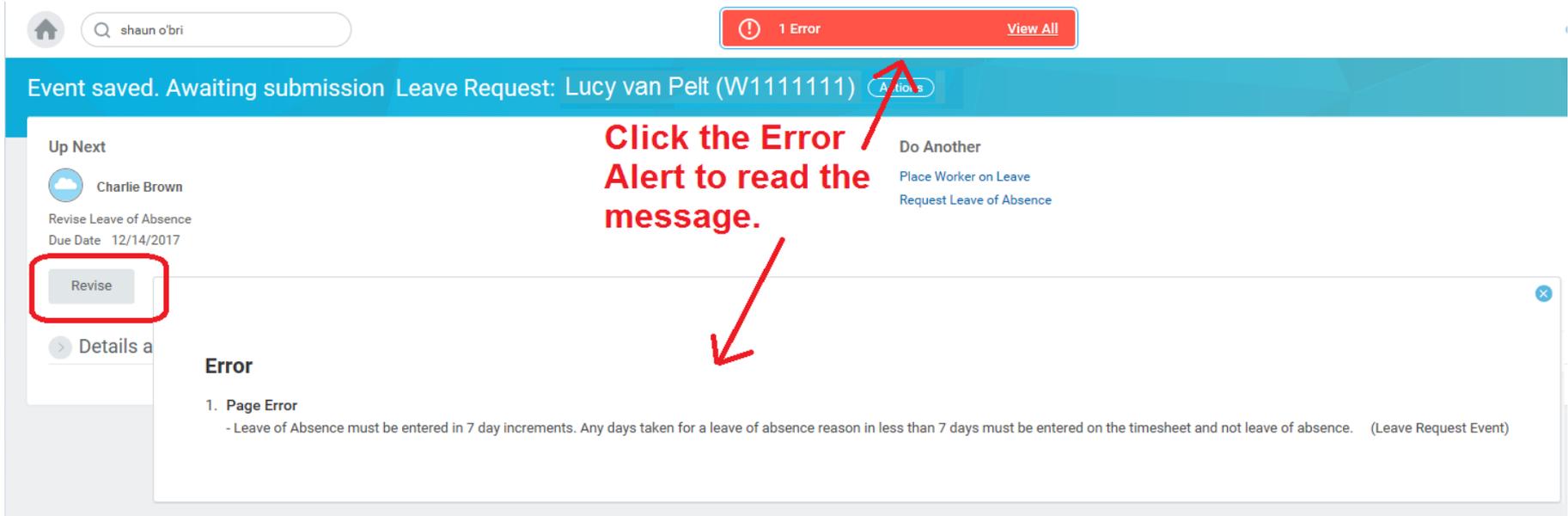
December 2017

SUN	MON	TUE	WED	THU	FRI	SAT
					1	2
3	4	5	6	7	8	9
10	11	12	8 Hours FMLA	8 Hours FMLA	8 Hours FMLA	16
17	8 Hours FMLA	8 Hours FMLA	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

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.



The screenshot displays the Statewide Personnel System interface. At the top, a search bar contains the name 'shaun o'bri'. A red alert banner at the top right indicates '1 Error' with a 'View All' link. Below this, a blue banner shows 'Event saved. Awaiting submission Leave Request: Lucy van Pelt (W1111111)' with an 'Actions' button. The main content area is divided into two columns. The left column, titled 'Up Next', lists 'Charlie Brown' with a 'Revise Leave of Absence' event due on '12/14/2017'. A 'Revise' button is highlighted with a red box. The right column, titled 'Do Another', includes options like 'Place Worker on Leave' and 'Request Leave of Absence'. A red text overlay with arrows points to the '1 Error' banner and the 'Revise' button, stating 'Click the Error Alert to read the message.' Below the main content, an 'Error' message is displayed: '1. Page Error - Leave of Absence must be entered in 7 day increments. Any days taken for a leave of absence reason in less than 7 days must be entered on the timesheet and not leave of absence. (Leave Request Event)'. A 'Details a' button is visible on the left side of the error message.

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.

Return Worker from Leave Lucy van Pelt (W1111111) Actions

If requesting a return from Paid > Military or Paid > Military Administrative, please submit your Military Return Orders in the Supporting Documents section.

First Day Back at Work 12 / 11 / 2017

Errors and Alerts Found

Leaves Returned From 1 item

Select	*Leave	First Day of Leave	Estimated Last Day of Leave	Actual Last Day of Leave
<input checked="" type="checkbox"/>	Paid > FMLA (Use Paid Leave) (12/12/2017)	12/12/2017	12/18/2017	12 / 10 / 2017

Errors and Alerts Found

- Error - Leaves Returned From (Row 1)
Actual Last Day of Leave must be on or after the First Day of Leave.



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Multiple LOA Events and Returning Worker from Leave



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Multiple LOA Events for an Employee

← Return Worker from Leave Tom Turkey (W1111111) Actions

If requesting a return from Paid > Military or Paid > Military Administrative, please submit your Military Return Orders in the Supporting

First Day Back at Work

Leaves Returned From 3 items

Select	*Leave
<input checked="" type="checkbox"/>	Unpaid > FMLA (Unpaid) - NON SPMS (12/06/2017)
<input type="checkbox"/>	Unpaid > Military Administrative (12/11/2017)
<input type="checkbox"/>	Unpaid > Temporary Total Disability (Unpaid) (12/04/2017)

Complete one Return from Leave for each LOA event. De-select the other LOA events.

- 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.





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Supporting Documentation



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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

Place Worker on Leave Lucy van Pelt (W1111111) Actions

Last Day of Work

First Day of Leave *

Estimated Last Day of Leave *

Leave Type *

Leave Impact

Payroll Effect

Absence Accrual Effect

Benefit Effect

Supporting Documents

Click to Expand

Click the *Supporting Documents* tab

Click the Plus  icon

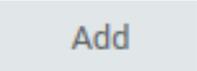
Click the Attach  button

Supporting Documents

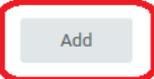
1 item

	Supporting Documents	Comment	File
		<input type="text"/>	

Upload Supporting Documentation: *Worker History > Maintain Employee Documents*

Click the Add  button.

Maintain Worker Documents Lucy van Pelt (W1111111) Actions

 Add

Reviewed Documents

Standard Documents 2 items

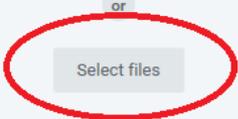
Document	Effective Date	Document Attachment	Signature Type	Signed By
MD Remote/Mobile Access Policy	11/11/2014	 Remote Access Policy Final.pdf	Acknowledgment	Lucy van Pelt (W1111111)
Confidentiality Agreement for SPS Users	11/11/2014	 Confidentiality statement for SPS users Final (1).pdf	Acknowledgment	Lucy van Pelt (W1111111)

Click the  Select files button.

Add Worker Document Lucy van Pelt (W1111111) Actions

Drop files here

or

 Select files



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Extending Leave of Absence Events



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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.





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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*

Human Torch (W1234567) Skilled

TTP10013 Skilled



Alisha Manager (W9999999)

Manager

Contact

Personal

Compensation

Career

Time Off

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)

Time Off Balance

Time Off and Leave Requests

1 items

Leave of Absence	Last Day of Work	First Day of Leave	Actual Last Day of Leave	Estimated Last Day of Leave
Paid > Accident	01/24/2016	01/25/2016		01/29/2016

3 items

Time Off	Date	Day of the Week	Type	Requested	Unit of Time	Comment
Q	01/14/2016	Thursday	Personal Leave (Time Off Calendar)	8	Hours	
Q	01/13/2016	Wednesday	Personal Leave (Time Off Calendar)	8	Hours	
Q	01/12/2016	Tuesday	Personal Leave (Time Off Calendar)	8	Hours	

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**

Balances Tracked in Hours 16 items

Time Off Plan	Unit of Time	Beginning Year Balance	Carryover Balance	Accrued Year To Date	Time Off Paid Year To Date	Beginning Period Balance	Accrued in Period	Time Off Paid in Period	Carryover Forfeited in Period	Ending Period Balance	Ending Period Balance Including Pending Events	As of Period	
Annual Leave	Hours	307.6		189.94	2	495.54	0	0	0	495.54	495.54	12/09/2015 - 12/22/2015 (Bi-Weekly Regular)	
										Total:	495.54	495.54	
Annual Leave Time Off Termination Payout Plan	Hours	307.6		187.94	0	495.54	0	0	0	495.54	495.54	12/09/2015 - 12/22/2015 (Bi-Weekly Regular)	
										Total:	495.54	495.54	
Compensatory Exempt Holiday Time	Hours	0		0	0	0	0	0	0	0	0	12/09/2015 - 12/22/2015 (Bi-Weekly Regular)	
										Total:	0	0	
Compensatory Time	Hours	0	0	51.5	0	51.5	0	0	0	51.5	51.5	12/09/2015 - 12/22/2015 (Bi-Weekly Regular)	

View Leave Results

- 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**

← Leave Results for Worker



Worker **Miley Cirus (On Leave) (W2121212)**

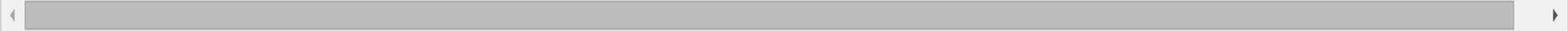
As Of 01/30/2016

Leave Type **FMLA (Unpaid)**

3 items



Leave Type	Calendar Period	Unit of Time	Total Taken	Outstanding Balance	Leave Taken Details									
					Request	Type	Reason	First Day	Estimated Last Day	Actual Last Day	Taken	Requested	Event	Status
Paid > FMLA (Use Paid Leave)	01/31/2015 01/30/2016	Hours	102.857148	378.142852	Leave	FMLA (Use Paid Leave)	Medical-S...	01/13/2016	01/26/2016		80.000004	80.000004	Q	Successfully Completed
					Leave	FMLA (Use Paid Leave)	Medical-Self	11/24/2015	11/27/2015	11/27/2015	22.857144	22.857144	Q	Successfully Completed
											Total: 102.857	102.857148		



Reports



← SPS Workers on Leave Actions

Organizations SPS Training Division E Include Pending Events Yes
Include Workers Returned from Leave Yes

1 item

First Name	Last Name	Leave Type (Including Family)	Last Day of Work	First Day	Estimated Last Day	Actual Last Day	Total Days	All Comments	Units Requested	Unit of Time
Martin-T	Matte-T	Paid > FMLA (Use Paid Leave)	01/09/2018	01/10/2018	01/23/2018	01/23/2018	4 Days (estimated)	HR Coordinator - E20: loa dates are	80.000004	Hours



Questions?

