Webinar: Leave of Absence Train the Trainer

September 18, 2018

Purpose of Training:

- **Train the Trainer**
- **Outline Basic Steps** for processing a Leave of Absence event
  - ➤ **Identify key roles** responsible throughout the LOA process for completion of each step
  - ➤ Discuss **best practices** in relation to agency protocol for processing Leave of Absence scenarios
  - ➤ **LOA Impacts**: Benefits and Payroll
- **Resources Available**
  - Tools available
  - Where to find guidance

Agenda:

- **LOA Updates: FMLA**
- **Outline Basic Steps** for processing a Leave of Absence event
- **Reminders**
  - **Supporting Documents**
  - **Validations**
- **LOA Impacts**: Benefits and Payroll
- **Resources Available**
  - Guides
  - Reports
  - Workday pages

LOA Updates: FMLA

FMLA Updates

- There was an issue where an FMLA event could not be entered due to insufficient balance, although there <u>was</u> sufficient balance.

  - This has been corrected. Instead of a red alert that stops you, you will get a yellow alert.

    - **<u>Always</u>** use the View Leave Results to verify how much FMLA has been used.

  - Employees should be able to enter zFMLA on their timesheet now.

Basic LOA Process Steps

LOA Process Flow Chart

1. Employee or Manager - Complete and submit paper work for leave requested with approvals per **agency protocol**

2. HRC – Uses **LOA chart** to determine appropriate Leave for Workday; Enters request and comments in Workday. **Impacts**: Manager notified; pending status affects View Leave Results

3. HR Partner (or Appointing Authority) – Reviews then Approves or Denies Workday Request. **Impacts:** For unpaid leave benefits is triggered; payroll affected because timesheet will be unpaid

3A. HRC - To Do: Request Compensation change. Only for SOME leave types: Military Admin

3B. Employee - To Do: Change Benefits Elections option. Only for Unpaid Leave

4. HRC, HRP, Manager, Employee, Timekeeper, Payroll – **COMMUNICATE:**
- on Timesheet entry
- run reports for status
- employee return dates
- Extensions

5. Employee/Manager – Returning to work following **agency protocol** for any paperwork and approvals.

6. HRC – Enter the return and comments into Workday. Reminder: Some can't be future dated. Return one event at a time

7. HR Partner (or Appointing Authority) – Reviews then Approves or Denies Workday Request. **Impacts:** For unpaid leave benefits is triggered; timesheet now open

Leave of Absence Process Steps

1. **Employee or Manager -** Complete and submit paper work for leave requested (per agency's protocol)

2. **HRC –** Determine type of leave and if Paid or Unpaid; Enter request in Workday.

   – Use *Leave of Absence and Corresponding Time Off Codes* Chart
   – Use **View Leave Results** capability in employee's profile
   – Contact **Agency HR Director** for guidance on policy and application

3. **HR Partner** – Reviews and Approves or Denies Request based on documentation and leave available. (For some types of leave, the Appointing Authority Partner will approve)

   – Use employee **Time Off tab** to verify the process is NOT a duplicate
   – Verify that the **transaction is in correctly and it is accurate**

3A. HRC - To Do: Request Compensation change (Only if needed)

3B. Employee- To Do: Change Benefits Elections. Only for **Unpaid Leave**

4. COMMUNCATE and monitor Leave

Leave of Absence Process Steps (cont.)

5. **Employee or Manager –** Communicate, complete and submit paper work to return to work (per agency's protocol)

6. **HRC –** Enters return in Workday.
- Return one event at a time
- Some returns cannot be future dated

7. **HR Partner** – Reviews and Approves or Denies Request based on documentation and leave available. (For some types of leave, the Appointing Authority Partner will approve)
- Verify that the **transaction is in correctly and it is accurate**

COMMUNCATE

Agency LOA Protocol

- Agencies need to have an internal process within their agency that everyone can follow (cheat sheet)

  - Who does the manager and/or employee contact to notify of an upcoming LOA event or return?
  - Who is the Point of Contact at the Agency for employees to contact regarding LOA questions?
  - Who can address policy clarification questions before the HR Director.

- The Leave of Absence and Corresponding Time Off Codes chart is available on the SPS HR Help Center and can be viewed by anyone

COMMUNICATION: HR, Payroll, Timekeeping, Employee, and Manager

- **Timesheets**: Some of the leave may not be captured in the LOA event and must be shown on the timesheet.

- **Return date changes**: Employee return dates may change, these changes must be recorded and corrected throughout the system.

- **Reports**: Run leave reports to verify that leave returns have been entered and accurately reflect documentation.

- **Notifications**: HRCs are the only roles capable of entering LOA events; Employee notifications may be sent to various team members but MUST be processed by HR.

LOA Reminders: Supporting Documents, Validations

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

Place Worker on Leave Lucy van Pelt (W1111111) (Actions)

Last Day of Work	12 / 27 / 2017
First Day of Leave *	12 / 28 / 2017
Estimated Last Day of Leave *	01 / 24 / 2018
Leave Type *	X Unpaid > Medical Leave

Leave Impact

Payroll Effect ✓

Absence Accrual Effect ✓

Benefit Effect ✓

← **Click to Expand**

Supporting Documents
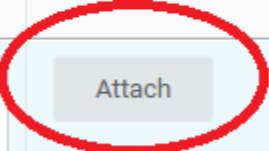
Click the *Supporting Documents* tab

Click the Plus ⊕ icon

Click the Attach Attach button

Supporting Documents
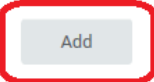
1 item

⊕	Supporting Documents	Comment	File
⊖			Attach

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

Click the Add [Add] button.
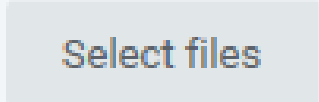
Maintain Worker Documents Lucy van Pelt (W1111111) (Actions)
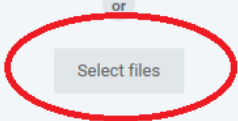
Add

Reviewed Documents

Standard Documents 2 items

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

Click the [Select files] Select Files button.

Add Worker Document Lucy van Pelt (W1111111) (Actions)

Drop files here

or

Select files

System Validations

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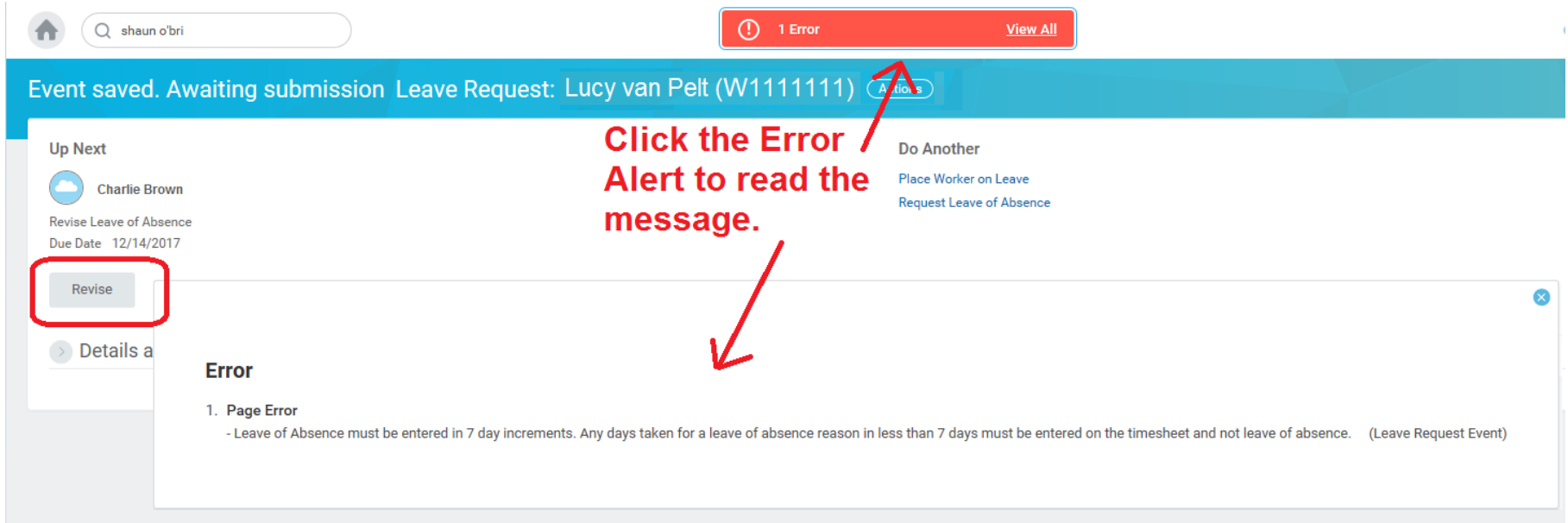
Why does Workday require that for some LOA events that the dates are entered in 7 day increments?

- 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 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 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.

Error: "*1.Page Error Not Sufficient Balance Exists (Leave request event)*"

The Not Sufficient Balance message appears when the HRC is entering the LOA event. It will also appear on the timesheet when using a time off code*.(now a warning not a hard stop)*

Issue:

Employee's leave available does not meet the required amount for the requested event time period.

Resolution:

1. Review the balance under View Leave Results.
      NOTE: If you do not click Cancel to cancel the LOA event before viewing the balance, then the LOA event will be "In Progress" status.

2. Revise LOA dates

      NOTE: Check the Worker History to see if the event is *In Progress.*

3. If there is a sufficient balance then click submit to continue.

Leave Impacts

Place Worker on Leave Page – Leave Impact

Place Worker on Leave Wentworth Miler-T (T1000348) ...

Last Day of Work	02 / 08 / 2016
First Day of Leave *	02 / 08 / 2016
Estimated Last Day of Leave *	02 / 14 / 2016
Leave Type *	✕ Unpaid > FMLA (Unpaid)
Leave Reason *	✕ Medical-Family

⌄ Leave Impact

Inactivate Worker	☐
Payroll Effect	☑
Absence Accrual Effect	☑
Stock Vesting Effect	☐
Benefit Effect	☑
Continuous Service Accrual Effect	☐
Sabbatical Effect	☐
Tenure Effect	☐

Informational Only: Checkmarks display in the **Leave Impact** section when applicable. For example, when on unpaid FMLA leave, an employee's absence accrual, payroll, and benefits are effected.

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Unpaid Leave Events

- Unpaid LOA events <u>trigger benefits events</u>.

- Unpaid LOA events should be <u>AT LEAST one week.</u>

- **Do not make any changes to an Unpaid LOA event once entered in Workday.** This includes:
  1. Return Worker from an Unpaid event
  2. Extending an LOA Event
  3. Changing an LOA Event from
     unpaid to paid

Extending LOA Event: Paid vs. Unpaid

Paid LOA Event

Follow 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 Event

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

> **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 Resources: Reports, Webinars, Guides

SPMS Workers on Leave Reports (HRC, HRP, Payroll, Timekeeper)

Report: <u>SPMS Workers on Leave</u>

SPMS Workers On Leave FMLA Composite

Determining Type of leave for Workday

Chart: **Leave of Absence and Corresponding Time Off Codes** (All)

Leave of Absence and Corresponding Time Off Codes

Leave Type Description	Leave Type	Intermittent/ Continuous	Paid or Unpaid	7 Day Increment Yes/No	Workday Instructions	Time Sheet Coding: *Corresponding Time Off Codes when Date Range Has Been Entered by HR*	Time Sheet Coding: *Corresponding Time Off Codes when Date Range is NOT Entered by HR*
Job-protected leave to employees who meet FMLA's eligibility requirements for certain medical reasons for themselves or a family member	FMLA	Continuous	Unpaid	*Yes*	Use: **Unpaid>FMLA (Unpaid)** Possible Reasons: **Medical - Family** **Medical - Self** **Other** *Place a note in the Comments section of the actual approved leave dates. Refer to Place Employee on Leave - 7 Day Increment Requirement job aid for further instructions.	**Leave the timesheet blank** *Because the FMLA is entered as unpaid by HR, no time off code is required on the timesheet.	Use: **zFMLA Leave Without Pay**
Job-protected leave to employees who meet FMLA's eligibility requirements for certain medical reasons for themselves or a family member	FMLA	Intermittent	Paid	No	Use: **Paid>Intermittent Time Off Approval Range** * Place a note in the Comments section of the actual approved leave dates.	Use the appropriate **zFMLA** time off code: **zFMLA Annual Leave** **zFMLA Personal Leave** **zFMLA Sick** **zFMLA Compensatory Time** **zFMLALeave Bank** **zFMLA Emloyee Donation**	N/A

Determining Type of leave (HRC, HRP & Timekeeper)

Tab: **View Leave Balances**

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

View Leave Results (HRC & HRP)

Determine the balance from the entitlement buckets, such as FMLA.

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 01/30/201b	Hours	102.857148	378.142852	Leave	FMLA (Use Paid Leave)	Medical-S...	01/13/2016	01/26/2016		80.000004	80.000004	🔍	Successfully Completed
					Leave	FMLA (Use Paid Leave)	Medical-Self	11/24/2015	11/27/2015	11/27/2015	22.857144	22.857144	🔍	Successfully Completed
											Total: 102.857	102.857148		

Worker History and Time Off Tab (HRC & HRP)

- **Worker History**: Review pending requests and to ensure there are no issues, such as duplicates.
- **Time Off Tab**: Review approved LOA events and to determine if a Return Worker from Leave has been completed

Additional Resources

All training material and resources available on SPS website in the **Help Center** tab:

IWIF Summary

Summary of IWIF in Workday

Continuous LOA Event vs. Timesheet Entry

	IWIF Pending	**IWIF Approved**
IWIF	Timesheet Entry	LOA Event
FMLA	None	Timesheet Entry

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Questions?