



STATEWIDE PERSONNEL
— S Y S T E M —

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





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LOA Updates: FMLA

FMLA Updates

- There was an issue where an FMLA event could not be entered due to insufficient balance, although there was sufficient balance.
 - This has been corrected. Instead of a red alert that stops you, you will get a yellow alert.
 - **Always** use the View Leave Results to verify how much FMLA has been used.
 - Employees should be able to enter zFMLA on their timesheet now.





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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. **COMMUNICATE 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

COMMUNICATE



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.





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LOA Reminders: Supporting Documents, Validations



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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



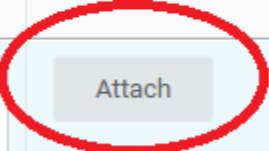
Click the *Supporting Documents* tab

Click the Plus  icon

Click the Attach  button

Supporting Documents

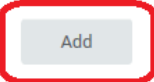
1 item

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

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



Click the Add  button.

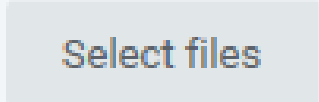
Maintain Worker Documents Lucy van Pelt (W1111111) Actions



Reviewed Documents

Standard Documents 2 items

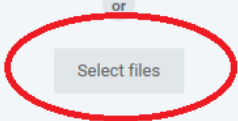
Document	Effective Date	Document Attachment	Signature Type	Signed By
MD Remote/Mobile Access Policy	11/11/2014	 Remote Access Policy Final.pdf	Acknowledgment	Lucy van Pelt (W1111111)
Confidentiality Agreement for SPS Users	11/11/2014	 Confidentiality statement for SPS users Final (1).pdf	Acknowledgment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

Click the  button.

Add Worker Document Lucy van Pelt (W1111111) Actions

Drop files here

or





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System Validations



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7 Day Increments Explained



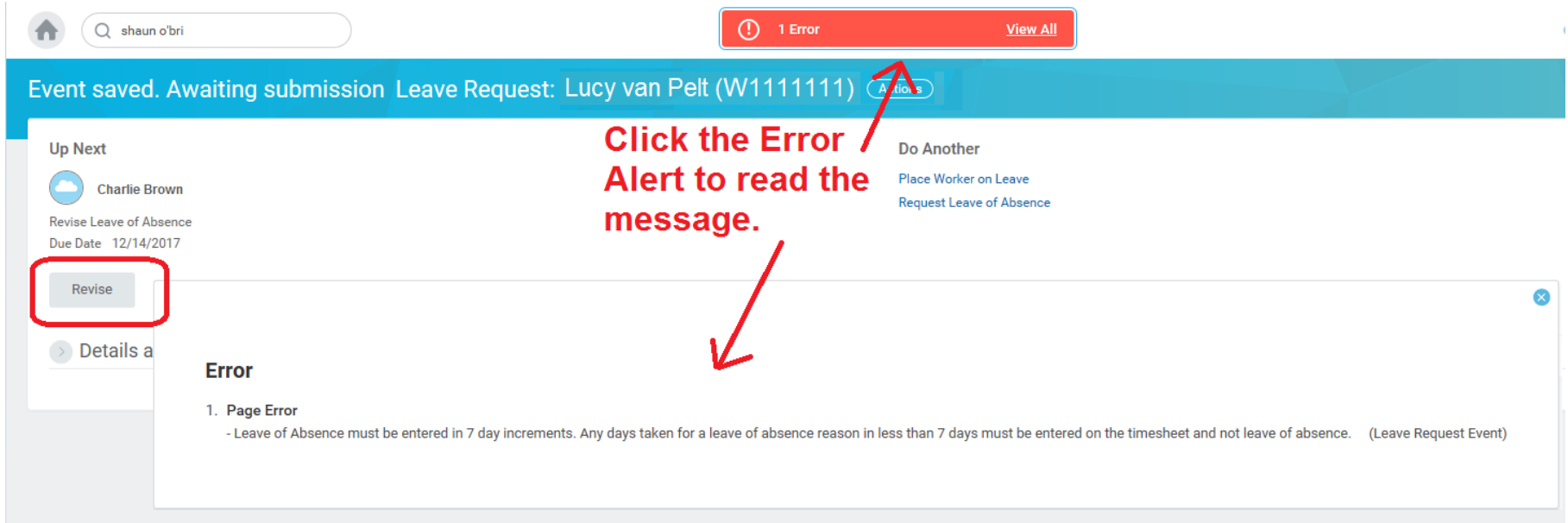
Why does Workday require that for some LOA events that the dates are entered in 7 day increments?

- 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 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 shows the Statewide Personnel System interface. At the top, there is a search bar with the text 'shaun o'bri' and a red alert banner that says '1 Error' with a 'View All' link. Below the banner, a blue notification bar reads 'Event saved. Awaiting submission Leave Request: Lucy van Pelt (W1111111)'. The main content area is titled 'Up Next' and shows a card for 'Charlie Brown' with the text 'Revise Leave of Absence' and 'Due Date 12/14/2017'. A red box highlights the 'Revise' button on this card. To the right of the card, there are links for 'Do Another', 'Place Worker on Leave', and 'Request Leave of Absence'. Below the card, 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 red arrow points from the '1 Error' alert banner to the error message, and another red arrow points from the error message to the 'Revise' button. A red text overlay says 'Click the Error Alert to read the 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.

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.





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Leave Impacts



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Place Worker on Leave Page – Leave Impact

Place Worker on Leave Wentworth Miler-T (T1000348) 

Last Day of Work 

First Day of Leave * 

Estimated Last Day of Leave * 

Leave Type * 

Leave Reason * 

 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.



Unpaid Leave Events

- Unpaid LOA events trigger benefits events.
- Unpaid LOA events should be AT LEAST one week.
- **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

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 Resources: Reports, Webinars,
Guides**

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

Report: SPMS Workers on Leave

← SPMS 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	14 Days (estimated)	HR Coordinator - E20: loa dates are	80.000004	Hours



SPMS Workers On Leave FMLA Composite

← SPMS Workers On Leave FMLA Composite Actions



> Details

46 Items



Worker	Last Name	First Name	Employee ID	Position ID	Job Profile	Employee Type	Supervisory Organization	Leave Of Absence Event	zFMLA Timecode
					HR Administrator III-4920	State/Regular	DBM - CAS, Salary	1	0
					Admin Spec II-1756	State/Regular	DBM - EBD Customer Services	1	0
					HR Analyst Sr DBM-4905	State/Regular	DBM - PSD HR	1	0
					Prgm Mgr IV-5479	State/Regular	DBM - Div. of Procurement Policy and Administration - Procurement Unit	1	0
					Admin Spec III-2043	State/Regular	DBM - Payroll Unit	1	0
					Office Secy III-6150	State/Regular	DBM - Central Collection Unit AB2	1	0
					Office Services Clerk-6779	State/Regular	DBM - Central Collection Unit AD	1	0
					Collection Agent II-5452	State/Regular	DBM - Central Collection Unit - Hagerstown	1	0
					HR Analyst Sr DBM-4905	State/Regular	DBM - Recruitment and	1	0



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	<u>Time Sheet Coding:</u> <i>Corresponding Time Off Codes when Date Range Has Been Entered by HR</i>	<u>Time Sheet Coding:</u> <i>Corresponding Time Off Codes when Date Range is <u>NOT</u> Entered by HR</i>
Job-protected leave to employees who meet FMLA's eligibility requirements for certain medical reasons for themselves or a family member	FMLA	Continuous	Unpaid	<u>Yes</u>	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 <u>Place Employee on Leave - 7 Day Increment Requirement</u> 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 Employee 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 01/30/2016	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: 102.857148	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

The screenshot displays the 'Human Torch' system interface for worker W1234567. The worker is identified as 'Skilled' and is managed by 'Alisha Manager (W9999999)'. The interface includes a navigation menu with tabs for Contact, Personal, Compensation, Pay, Performance, Career, and Time Off. The 'Time Off' tab is selected, showing a sub-tab for 'Time Off and Leave Requests'. Below this, there is a table for 'Leave of Absence' and a table for 'Time Off' requests.

Human Torch (W1234567) Skilled

TTP10013 Skilled

View Team

Alisha Manager (W9999999)
Manager

Baltimore - 301 W. Preston St

Contact Personal Compensation Pay Performance Career Time Off

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

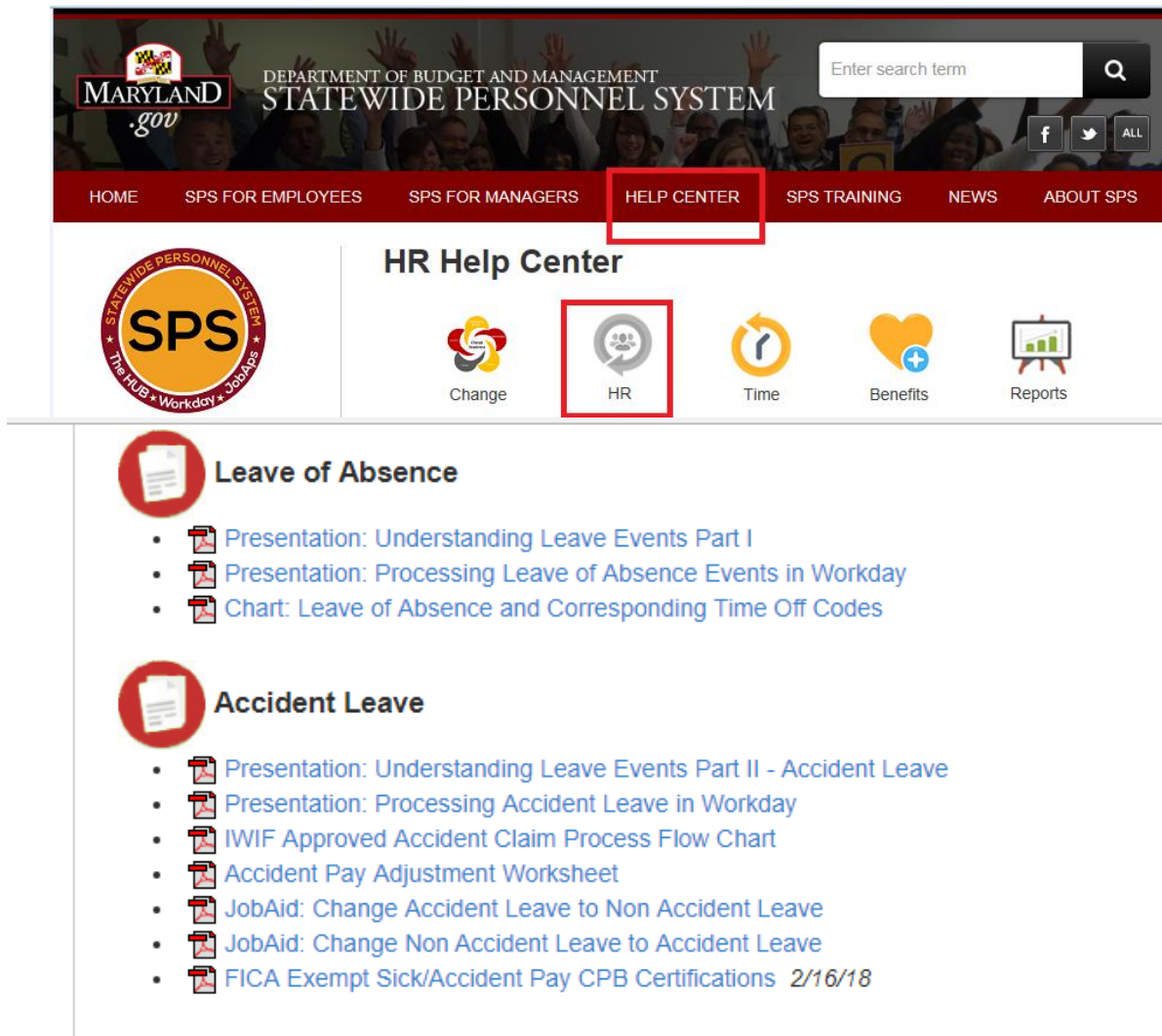
3 items

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	



Additional Resources

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



MARYLAND .gov DEPARTMENT OF BUDGET AND MANAGEMENT STATEWIDE PERSONNEL SYSTEM

Enter search term

HOME SPS FOR EMPLOYEES SPS FOR MANAGERS **HELP CENTER** SPS TRAINING NEWS ABOUT SPS

STATEWIDE PERSONNEL SYSTEM SPS The HUB * Workday * Jobsaps

HR Help Center

Change HR Time Benefits Reports

Leave of Absence

- [Presentation: Understanding Leave Events Part I](#)
- [Presentation: Processing Leave of Absence Events in Workday](#)
- [Chart: Leave of Absence and Corresponding Time Off Codes](#)

Accident Leave

- [Presentation: Understanding Leave Events Part II - Accident Leave](#)
- [Presentation: Processing Accident Leave in Workday](#)
- [IWIF Approved Accident Claim Process Flow Chart](#)
- [Accident Pay Adjustment Worksheet](#)
- [JobAid: Change Accident Leave to Non Accident Leave](#)
- [JobAid: Change Non Accident Leave to Accident Leave](#)
- [FICA Exempt Sick/Accident Pay CPB Certifications 2/16/18](#)

IWIF Summary

Summary of IWIF in Workday



Continuous LOA Event vs. Timesheet Entry

	<i>IWIF Pending</i>	<i>IWIF Approved</i>
IWIF	Timesheet Entry	LOA Event
FMLA	None	Timesheet Entry



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



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



Questions?

