



PROCESSING FMLA EVENTS

TM-47 | TRANSACTION PTFMLA

TM

The purpose of this Business Process Procedure is to explain how to enter an FML transaction in the Integrated HR-Payroll System.

Trigger: Employee has requested an FMLA, and an FMLA transaction needs to be processed.

Business Process Procedure Overview:

Eligible state employees are entitled to Family Medical Leave (FMLA) and Family Illness Leave (FIL). In either situation, an employee can use paid leave time or LWOP to account for absences during the specified periods. While employees are on FMLA, it is necessary to associate an employee's absences with the FMLA event in order to track when the allowable leave entitlement has been exhausted. To properly associate an employee's absences with FMLA, a record with the FMLA entitlement is first created in the HR/Payroll system. The employee's applicable absences are attributed to the FMLA event.

The Family Medical Leave Workbench (transaction PTFMLA) handles all processes related to FMLA events only. FIL events must be tracked offline.

When creating an FMLA request, the FMLA Workbench will automatically check an employee's eligibility for FMLA. Based on OSHR policy, an employee's eligibility is related to his or her length of State service and hours worked during the previous 12 months.

After an employee has exhausted all of his or her leave entitlement, the FMLA Workbench will also manage his or her eligibility for subsequent leave entitlements.

This BPP will detail:

1. Creating an FMLA request (or record)
2. Approving an FMLA request
3. Attributing absences to an approved FMLA request

Tips and Tricks:

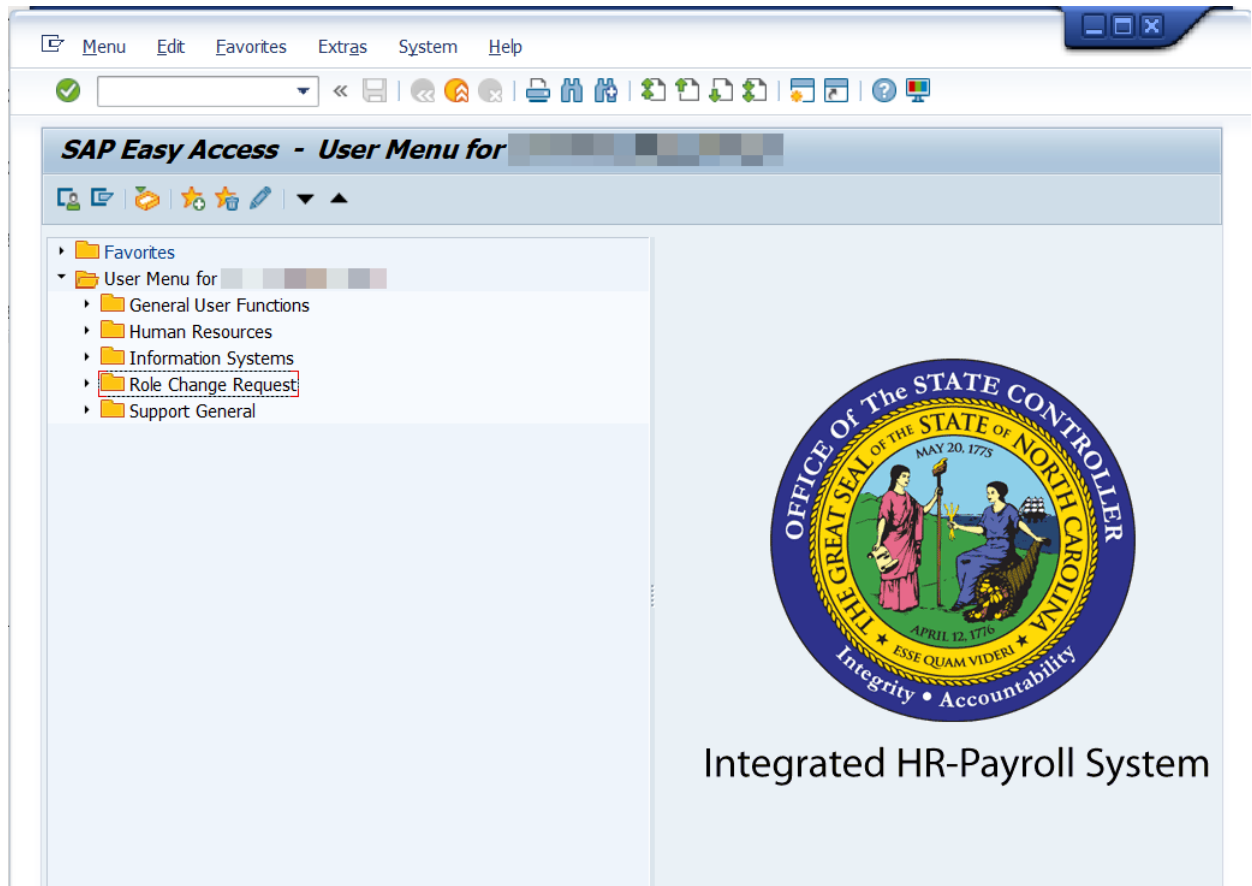
See OM Tips and Tricks Job Aid for a full listing of Best Practices and Tips and Tricks. The job aid is located on the Training Help page under Help Documents.

Access Transaction:

Via Menu Path: There is no menu path for this transaction code. You must enter transaction code in the command field.

Via Transaction Code: PTFMLA


Procedure



1. Update the following field:

Field Name	Description	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	Enter value in Command. Example: PTFMLA

2. Click the **Enter**  button.



Information

You may want to enter this transaction code in your Favorites folder.

- Choose **Favorites > Insert Favorites**
- Type in **PTFMLA**.
- Click **Enter**.

To see the transaction code displayed in front of the link in your favorites:

- Choose **Edit > Settings**.
- Place a check next to **Display Technical Names**.
- Click **Enter**.

FMLA Workbench

Create Request

Personnel No.

FMLA Requests

From	To	Description of FMLA Reason	Cont./Int.	Status	Requested	Med.Certif
------	----	----------------------------	------------	--------	-----------	------------

3. Update the following field:

Field Name	Description	Values
Personnel No.	Unique employee identifier	Enter value in Personnel No. Example: 80001036

4. Click the **Enter**  button.

An employee may have multiple approved FMLA requests. If the employee has previous FMLA requests, they will be listed under the screen heading FMLA Requests. The FMLA Workbench will manage any concurrent events in an entitlement period and deduct absences attributed to concurrent events from the same entitlement.

FMLA Workbench

Create Request

Personnel No.

Name

Personnel area Cost Center

EE subgroup FT N-FLSAOT Perm WS rule MTWHF-...

FMLA Requests

From	To	Description of FMLA Reason	Cont./Int.	Status	Requested	Med.Certif
------	----	----------------------------	------------	--------	-----------	------------

Select one of the following options:

IF:	THEN:
You wish to create a FMLA request,	Proceed with step 5.
You wish to associate absences with an approved request	Proceed to step 15.

5. Click the **Create Request**  button.

6. Click the **FMLA Reason** drop-down list.

There are six reasons recognized as applicable for FMLA leave according to the Federal law and OSHR policy.

- Birth
- Adoption
- Foster Care
- Illness of Child, Spouse, Parent
- Employee’s Illness
- Communicable Disease Non-Illness

There is one reason recognized as applicable for FIL according to OSHR policy.

- Illness of Child, Spouse, Parent

An employee is entitled to FIL only after he or she has exhausted the leave entitlement provided by FMLA.


7. Select **Birth** from the FMLA Reason drop-down list.

8. Update the following fields:

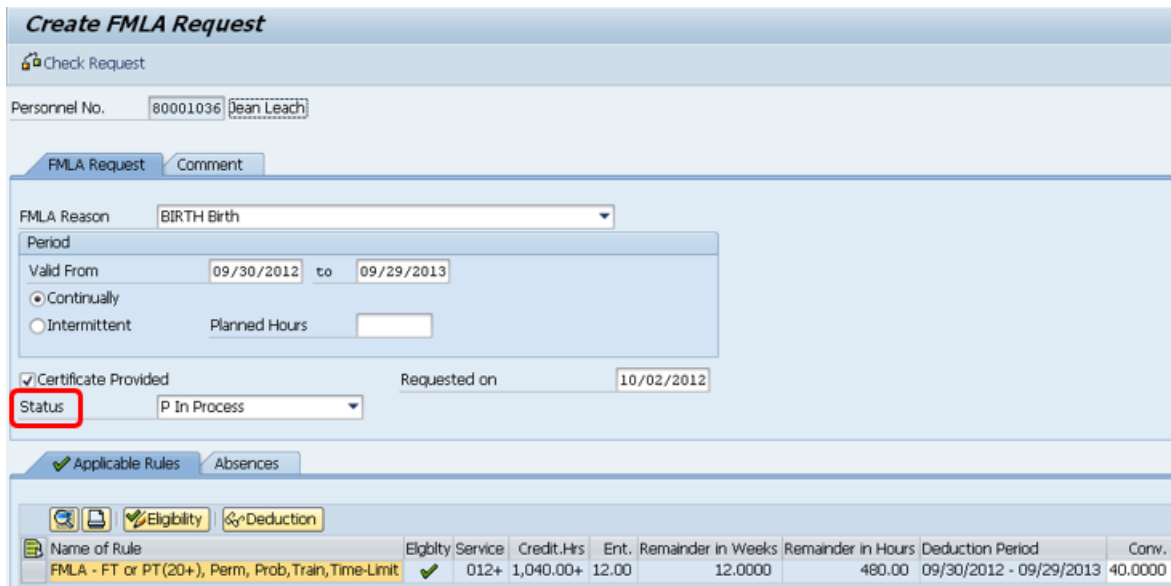
Field Name	Description	Values
Valid from	Beginning date of the specified date range	Enter value in Valid from. Example: 9/30/2012
To	Ending date of the specified date range	Enter value in To. Example: 9/29/2013

The Valid From and to dates should correspond with the period for which the employee is eligible for the leave entitlement - one year for FMLA requests. If the employee has an existing FMLA event, the


to date will be adjusted automatically to the end date of the previous request. This functionality ensures that the employee does not receive entitlement in excess of that allowed by Federal law or OSHR policy.

9. Click **Certificate Provided** Certificate Provided checkbox.
10. Click **Check Request**  Check Request button.

The FMLA Workbench will perform the applicable eligibility checks against the request. If the employee is eligible, the request will have a green check mark in the *Elgblty* column as shown in the example that follows. If the employee is not eligible, a red 'X' will display in the *Elgblty* column. If the employee is ineligible the *Service* and/or *Credit Hrs* columns will provide additional information related to the employee's ineligibility.



Name of Rule	Elgblty	Service	Credit.Hrs	Ent.	Remainder in Weeks	Remainder in Hours	Deduction Period	Conv.
FMLA - FT or PT(20+), Perm, Prob,Train,Time-Limit	✓	012+	1,040.00+	12.00	12.0000	480.00	09/30/2012 - 09/29/2013	40.0000

11. Click the **Status** drop-down list.
 FMLA requests can be approved or rejected. If an employee is deemed ineligible, the request should be rejected. In the following example, the request is approved.
12. Select **Approved** in the list box.
 The FMLA request must be approved before absences can be associated with the event.
13. Click the **Save (Ctrl+S)**  button.
14. After saving the request, the system displays the FMLA request number.

 FMLA request 000000000902 was saved

After approving and saving a request, you are returned to the initial FMLA Workbench screen. The new request now displays under the FMLA Requests heading. The following steps detail how to associate absences to an existing FMLA event.

FMLA Workbench

Create Request

Personnel No. 80001036
 Name Jean Leach
 Personnel area 4601 Cultural Resources Cost Center 4699999999 CULTUR ...
 EE subgroup A1 FT N-FLSAOT Perm WS rule D01N08GN MTWHF- ...

Absences

FMLA Requests


From	To	Descriptn	Cont./Int.	Status	Requested on	Med.Certif
09/30/2012	09/29/2013	Birth	Continuous	Approved	10/02/2012	<input checked="" type="checkbox"/>

15. Update the following field:

Field Name	Description	Values
Personnel No.	Unique employee identifier	Enter value in Personnel No. Example: 80001036

16. Select (highlight) the applicable event.

17. Click the **Absences** button.



Check that the desired request is highlighted when clicking the Absences button to ensure the absences are associated with the correct FMLA event.

Information

Assign Absences

Personnel No. Jean Leach

FMLA Request

FMLA Reason

Period

Valid From to

Continually
 Intermittent

Certificate Provided

Status


Applicable Rules

FMLA	Start Date	End Date	Att./abs. type te...	Absence h...	Att./abs. days	Payroll hou...	Payr.da...
<input checked="" type="checkbox"/>	10/12/2012	10/12/2012	Sick Leave	8.00	1.00	8.00	1.00
<input checked="" type="checkbox"/>	10/11/2012	10/11/2012	Sick Leave	8.00	1.00	8.00	1.00
<input checked="" type="checkbox"/>	10/10/2012	10/10/2012	Sick Leave	8.00	1.00	8.00	1.00
<input checked="" type="checkbox"/>	10/09/2012	10/09/2012	Sick Leave	8.00	1.00	8.00	1.00
<input checked="" type="checkbox"/>	10/08/2012	10/08/2012	Sick Leave	8.00	1.00	8.00	1.00
<input type="checkbox"/>	10/05/2012	10/05/2012	Approved Leave	8.00	1.00	8.00	1.00
<input type="checkbox"/>	10/04/2012	10/04/2012	Approved Leave	8.00	1.00	8.00	1.00
<input checked="" type="checkbox"/>	10/03/2012	10/03/2012	Approved Leave	8.00	1.00	8.00	1.00
<input checked="" type="checkbox"/>	10/02/2012	10/02/2012	Approved Leave	8.00	1.00	8.00	1.00
<input checked="" type="checkbox"/>	10/01/2012	10/01/2012	Approved Leave	8.00	1.00	8.00	1.00

18. Click the **checkbox** for any applicable absences.

All of the employee's recorded absences in the validity period of the request are displayed on the Absences tab. If an absence is related to the FMLA event, select the box in the FMLA column. The hours of the checked absences will be deducted for the employee's leave entitlement.

In this example, it was determined that the Approved Leave absences on 10/4 and 10/5 were not applicable.

19. Click the **Save (Ctrl+S)**  button. The FMLA request message at the bottom of the screen lets you know the request has been saved.

20. Click the **Applicable Rules**  tab.

Assign Absences

Personnel No. 50001036 Jean Leach


FMLA Request Comment

FMLA Reason BIRTH Birth


Period
Valid From 09/30/2012 to 09/29/2013
 Continually
 Intermittent Planned Hours 0.00

Certificate Provided Requested on 10/02/2012
 Status A Approved

Applicable Rules Absences






Name of Rule	Elgblty	Service	Credit.Hrs	Ent.	Remainder in Weeks	Remainder in Hours	Deduction Period	Conv.
FMLA - FT or PT(20+), Perm, Prob,Train,Time-Limit	✓	012+	1,040.00+	12.00	10.4000	416.00	09/30/2012 - 09/29/2013	40.0000

21. Select (highlight) the applicable event.
22. Click the **Deduction**  button.

Deduction by Absences

Period of Request	Descr.	FMLA Reason	Deduction in Weeks	Payroll hou...	Start Date	End Date	Att./abs. type te...
09/30/2012 - 09/29/2013	Birth		0.20	8.00	10/01/2012	10/01/2012	Approved Leave
09/30/2012 - 09/29/2013	Birth		0.20	8.00	10/02/2012	10/02/2012	Approved Leave
09/30/2012 - 09/29/2013	Birth		0.20	8.00	10/03/2012	10/03/2012	Approved Leave
09/30/2012 - 09/29/2013	Birth		0.20	8.00	10/08/2012	10/08/2012	Sick Leave
09/30/2012 - 09/29/2013	Birth		0.20	8.00	10/09/2012	10/09/2012	Sick Leave
09/30/2012 - 09/29/2013	Birth		0.20	8.00	10/10/2012	10/10/2012	Sick Leave
09/30/2012 - 09/29/2013	Birth		0.20	8.00	10/11/2012	10/11/2012	Sick Leave
09/30/2012 - 09/29/2013	Birth		0.20	8.00	10/12/2012	10/12/2012	Sick Leave

The absence deductions you requested have been processed.

23. Click the **green check**  to close the box.
24. Click the **Back (F3)**  button.
25. Click the **Back (F3)**  button to return to the SAP Easy Access screen.

The system task is complete.

Additional Resources

Training HELP website: https://www.osc.nc.gov/state-agency-resources/training/training_help_documents

Change Record

Change Date: 5/7/20 – D. Genzlinger/J. Boyette
11/7/13 – J. Kistler/J.Prevo
10/4/12 – N. Boyer

Changes: Converted to new BPP layout

Global

- removed references to FIL

Business Process Procedure Overview

- Par 1 - Text updated with regard to FIL
To properly associate an employee's absences with FMLA, <text removed> a record with the FMLA entitlement is first created in the Integrated HR-Payroll System. <text removed> The employee's applicable absences are attributed to the FMLA/FIL event.
- Par 2: *FIL events must be tracked offline.*

Added Additional Resources at end of document

Name change from OSP to OSHR

Added new reason to list on step #6 – Comm. Disease Non-Illness

Change Date: 5/7/20 – Changed by C. Ennis

Changes: Updated format, assigned reference number, and made accessible