



UCDAVIS
HEALTH SYSTEM

Small Wins: Creating Customer Value by Developing an FMLA Module

Agenda

- Introduction
- Problem
- Solution
- Customer Value
- System Overview
- Questions & Answers

Presenter Introductions

- Susana Lee
 - IT Manager
 - Project Oversight

- Alida Bailey
 - Business Analyst
 - QA Tester

- Drew Pokorney
 - Project Manager

System Introduction

- The UCPath project will replace the HR and Payroll system
- In order to support UCPath, a new time and attendance system was required
- HBS ectime was chosen for Time and Attendance
- The team worked with the vendor to build an FMLA module

Problem

- The Health System manually tracked FMLA events
- FMLA eligibility calculations and usage were not standardized across departments
- Departments could not easily track FML usage or manage required documents
- Communication was inconsistent and untimely
- FMLA reporting processes were manual and time consuming

It's Complicated . . .

Family and Medical Leave Act

State Laws & UC Policies

Military Leave

Parental Bonding Leave

Workers' Compensation

Rehabilitation Leave

Pregnancy Disability Leave

Opportunity: Time & Attendance System Replacement

- With a new system, the organization was able to work with the vendor to build a customized FMLA solution
- Centralized system with standardized business rules for determining FMLA eligibility and entitlements
- Uses reporting relationships in PeopleSoft to ensure the appropriate manager approves the FMLA event

Scope that Guided this Project

- Standardize Attendance and Leave Management Practices across the Health System
- Mitigate risk to the organization and minimize disruption to business operations
- Deliver tools and technology to improve processes for supervisors/managers, departments and employees

Scope that Guided this Project

- Redesign workflow for leaves
- Automate manual, paper-driven processes
- Increase accountability and visibility of FML events and leave administration

Business Requirements

- Determine Eligibility:
 - 12 months of cumulative University service (*need not be continuous*);
 - A minimum of 1,250 actual work hours within the 12 month period immediately preceding the start of the leave. Non-worked hours (vacation, sick, holiday hours) do not count.
- Calculate Entitlements Used
- Send forms and notices required for FML events

Business Requirements

- Notify managers and employees of required actions
- Automate reporting
- Be easy for all users!!

Current (As-Is) vs. Future (To-Be)

CURRENT STATE	FUTURE STATE
Employee submits hard-copy Leave of Absence Request.	Employee requests FMLA Leave online via ectime.
Employee downloads forms from Intranet.	Employee is e-mailed forms via FMLA Module.
Supervisor informs employee of provisional approval for FML.	Employee is provided with notification of approval via FMLA Module.
Supervisor manually determines FML eligibility.	Supervisors are provided eligibility and entitlements confirmation via ectime FMLA Module.
Supervisor manually confirms FML entitlements.	
All interaction between Supervisor and the employee are manual.	Automated notifications are sent to employee and supervisor.
Supervisor manually tracks FML usage.	FMLA Module automatically tracks FML usage.

Development Strategy

- Partnered with Employee & Labor Relations and Payroll Departments
 - Identified Department Subject Matter Experts
 - Gathered Requirements
 - Documented Business Process Flows
 - Collaborated on User Acceptance Testing

Development Strategy

- Partnered with HBS (Vendor)
 - Customized FMLA Module
 - Accessed vendor QA site for testing
 - Documented defects
 - Held weekly progress checks
 - Developed forms and reports

Development Strategy

- Established Super User groups
 - Identified FMLA Coordinators
 - Conducted Beta testing
 - Facilitated “Train the Trainer” Sessions
- Post-implementation
 - Support production issues
 - Track enhancements
 - Communicate with Vendor

Training Strategy

- Primary training completed with videos:
 - System overview and routine skills training through UC Learning Center
 - Job aids, FAQs, and training videos available on HR website (short URL)
 - Advantages:
 - ✓ Self-directed
 - ✓ Flexible
 - ✓ Scalable, smaller modules
 - ✓ Lower cost

Key Preparations for Go-Live

- View FMLA training videos via UC Learning
- Visit ectime LOA/FMLA web page for job aids & FAQs
- Attend FMLA Start-up Training
- Continue tracking employee FMLA events until Go-Live
- Retain records (may be needed to calculate entitlement for future FMLA events)

Deployment Plan

Go Live Date	Groups	Estimated Count	Training Start Date
Mar 1, 2015	Monthly Exempt Employees	500	Feb 23
Mar 15, 2015	Bi-Weekly Exempt Employees	2,200	Mar 9
Apr 12, 2015	All Hourly Employees	7,600	Mar 23
Apr 12, 2015	FMLA Module – All Health System Employees	10,000+	Mar 30

Customer Value (The Small Wins)

- Supported consistency across the Health System
- Standardized practices and processes
- Expanded access to information and resources for individual employees and departments
- Interfaced Human Resource and Payroll Systems
- Delivered a system that minimizes human intervention

Customer Value (Even More Small Wins)

- Proactive management of FMLA events
- Consistent tracking of leave events, including intermittent leave
- Ability to track multiple FML leaves
- Enhanced data accessibility and reporting
- Visibility of leave patterns resulting in non-productive time
- Enables employees to “Stay At Work” or “Return to Work” sooner

FMLA Entitlement Transition

FMLA Time Tracking Tool for Qualifying Employees

Employee Name: Prueba Hinde
 Employee Number: 333555333
 Standard Work Hours Per Week: 40.00
 Standard FMLA Hours Available: 384.00
 Start Date: 03/04/2015
 Enter total of previously used FMLA hours this year: 96.00

Note: The red triangles in several cells have comments that tell you more about what to enter in those cells/columns. Place your mouse pointer close to each triangle.

Date	Day	# FMLA Hours Taken	Type of Absence (S, V, C, U)	FMLA Time Available
3/4/2015	Wed	8.00		376.00
3/5/2015	Thu	8.00		368.00
3/6/2015	Fri	8.00		360.00
3/7/2015	Sat			360.00
3/8/2015	Sun			360.00
3/9/2015	Mon	8.00		352.00
3/10/2015	Tue	8.00		344.00
3/11/2015	Wed	8.00		336.00
3/12/2015	Thu	8.00		328.00
3/13/2015	Fri	8.00		320.00
3/14/2015	Sat			320.00
3/15/2015	Sun			320.00
3/16/2015	Mon	8.00		312.00
3/17/2015	Tue	8.00		304.00
3/18/2015	Wed	8.00		296.00
3/19/2015	Thu	8.00		288.00
3/20/2015	Fri	8.00		280.00
3/21/2015	Sat			280.00
3/22/2015	Sun			280.00
3/23/2015	Mon	8.00		272.00
3/24/2015	Tue	8.00		264.00
3/25/2015	Wed	8.00		256.00
3/26/2015	Thu	8.00		248.00
3/27/2015	Fri	8.00		240.00

Reason Code: FML - FAM 1
 Start Date: 3/3/2015
 Status: Approved
 Intermittent:
 End Date: 3/6/2015
 Submit Approved Timeoff Request? Extended Sick Time
 Planned Hours: 24
 Requested On: 3/4/2015
 Follow Up Required:
 Status Provided By: DISI,PROBA (111555111)

FMLA Forms

Drag a column header here to group by that column

Title	Description	Download	Due Date	Received	Received Date	Received By
Declaration of Relationship Form	Declaration of Relationship Form	Declaration of Relationship Form	3/19/2015	<input type="checkbox"/>	Please Select	
Medical Certification for Family Member's Serious	Medical Certification for Family Member's Serious Health Condition	Medical Certification for Family Member's Serious	3/19/2015	<input type="checkbox"/>	Please Select	

FMLA Year Balance

Balance Year cap number of hours is set to:

Drag a column header here to group by that column

Balance Year Start Date	Balance Year End Date	Default Cap No of Hours	Cap No of Hours
01/01/2015	12/31/2015	480	240

Employee Requests

FMLA Module System Demo



Questions?





FMLA Initiation

Please select the appropriate task.

Employee Name: CAI, UJIAN Hire Date: 3/13/2006 Status: A - Active FLSA Code: N - NonExempt

Department: H 1009852 Timesheet Group: 11555111 Supervisor Name: DISI, PROBA

Reason Code: Please Select Intermittent: Planned Hours: 0

Start Date: End Date: Please Select

FMLA Year
Balance Year: 01/01/2015

	Default Cap No of Hours	Cap No of Hours
	480	0

Employee Requests

Employee self-service to submit FMLA Event.

System Notifications

The system will send out email notifications and will display web messages for both the employee and supervisor.

Messages

FMLA Alert

Your FMLA request for FML – FAM 1 was received on 07/08/2016 11:31:14
Your FMLA Representative: DISI,PROBA, proba.disi@ucdmc.ucdavis.edu

Please complete and return the required forms.

FMLA Information Forms			
Form Title	Form Description	Download	Date Needed
Declaration of Relationship Form	Declaration of Relationship Form	Download	07/23/2016
Medical Certification for Family Member's Serious	Medical Certification for Family Member's Serious Health Condition	Download	07/23/2016

The link to the Employee Rights and Responsibility Fact Sheet is provided to inform you of your rights and responsibilities related to FMLA.
[Employee Rights and Responsibilities Under FMLA](#)

CAI,UJIAN has submitted a request in ectime for FML – FAM 1 on 07/08/2016 11:31:14.

Manager Review of FMLA Request

Employee Tasks **Manager Tasks** Messages History Reports Employee Setup Log Off Help DISI,PROBA

Timesheet Group Employee Balances Time Off Approvals **FMLA Request** Delegate Authority Schedule Attendance OnCall

Employee:

Employee Name: CAI,UJIAN Hire Date: 3/13/2006 Status: A - Active FLSA Code: N - NonExempt

Department: H 1009852 Timesheet Group: 11555111 Supervisor Name: DISI,PROBA

[Employee Info](#)

[View Details](#)

Reason Code: Intermittent: Planned Hours:

Start Date: End Date: Requested On:

Status: Follow Up Required: Status Provided By:

FMLA Forms

Drag a column header here to group by that column

Title	Description	Download	Due Date	Received	Received Date	Received By
Declaration of Relationship Form	Declaration of Relationship Form	Declaration of Relationship Form	7/23/2016	<input type="checkbox"/>	Please Select	
Medical Certification for Family Member's Serious	Medical Certification for Family Member's Serious Health Condition	Medical Certification for Family Member's Serious	7/23/2016	<input type="checkbox"/>	Please Select	

Eligibility

Supervisors can quickly and easily determine whether employee is FML eligible by reviewing this information in the system.

Employee:

Employee Name: CAI,UJIAN Hire Date: 3/13/2006 Status: A - Active FLSA Code: N - NonExempt

Department: H 1009852 Timesheet Group: 11555111 Supervisor Name: DISI,PROBA

Reason Code: Intermittent: Planned Hours:

Start Date: End Date: Requested On:

Status: Follow Up Required: Status Provided By: BAILEY,ALIDA J (255350)

FMLA Forms

Drag a column header here to group by that column

Title	Description	Download	Due Date	Received	Received Date	Received By
Declaration of Relationship Form	Declaration of Relationship Form	Declaration of Relationship Form	7/23/2016	<input type="checkbox"/>	Please Select	
Medical Certification for Family Member's Serious	Medical Certification for Family Member's Serious Health Condition	Medical Certification for Family Member's Serious	7/23/2016	<input type="checkbox"/>	Please Select	

Employee Eligibility calculated as of 7/8/2016 1:25:40 PM
 Required:
 Actual:

Min. No. Of Hours, Last 12 Months

1250
1377

Min. Months Of Service

12
123

Approve/Modify FML Request

The supervisor can approve or modify a LOA/FML request.

The screenshot shows a web-based form for managing FMLA requests. The form includes the following fields and options:

- Reason Code:** A dropdown menu currently showing "CFRA Leave".
- Intermittent:** A dropdown menu with options "Please Select", "Pending", and "Approved". The "Approved" option is currently selected.
- Status:** A checkbox labeled "Submit Approved Timeoff Request?".
- Start Date:** A date picker set to "2/3/2014".
- End Date:** A date picker set to "6/6/2014".
- Planned Hours:** A text input field containing the number "190".
- Follow Up Required:** An unchecked checkbox.
- Status Provided By:** A text input field containing the initials "ec".
- Requested On:** A date picker set to "2/3/2014".

Entitlements

The system will automatically track the FML Year, event usage and reduce the FML year balance appropriately.

FMLA				
Category	Balance Year	Starting Balance	Taken Balance	Current Balance
FMLA YEAR	01/01/2016 - 12/31/2016	480.000	16.000	464.000
FML - Self 1		100.000	16.000	84.000

FMLA				
Category	Balance Year	Starting Balance	Taken Balance	Current Balance
FML - Self 1		100.000	16.000	84.000

NA				
Date	Description	Hours	Totals	Source
03/01/2016	FML - Self 1	100.000	100.000	FMLA
04/11/2016	FML - Self 1(Leave w/o pay)	-8.000	92.000	FMLA
04/18/2016	FML - Self 1(Leave w/o pay)	-8.000	84.000	FMLA

FMLA Reports

- Reports
 - Manager Reports
 - Accruals
 - Employee Info Reports
 - FMLA Reports
 - FMLA
 - FMLA Employee
 - FMLA Employee Details
 - FMLA Follow Up
 - FMLA Tracking With Forms
 - UCD FMLA Intermittent Report
 - UCD FMLA Parameter Report
 - UCD FMLA Pre-Eligibility Calculation
 - UCD FMLA Summary Report

FMLA

Department	No Filter	Employee	No Filter
Reason Code:	CFRA BBL, CNA CFRA CCL, CNA	Status:	Pending
FMLA Date Bewteen	7/11/2016 1:56:22 PM	And	7/22/2016 1:56:22 PM
Display Criteria	<input type="radio"/> True <input checked="" type="radio"/> False	FormatReport?	<input checked="" type="radio"/> True <input type="radio"/> False

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Employee Name:	CAI,UJIAN	Employee ID:	111321111
Start Date:	7/11/2016	End Date:	7/15/2016
Planned Hours:	0	Intermittent:	No
Status:	Pending	Status Provided By:	BAILEY,ALIDA J (255350274)
Reason:	FML – FAM 1		