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:

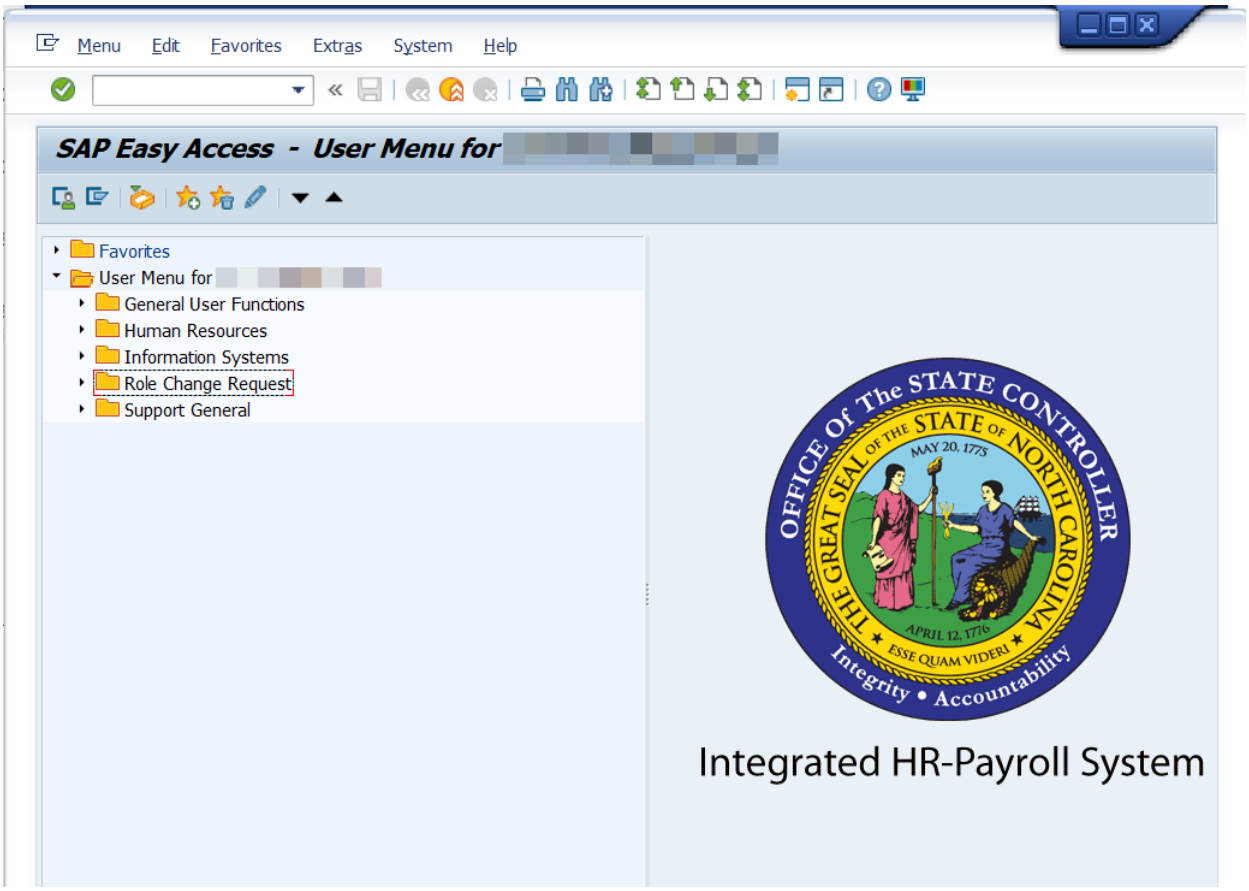
See OM Tips and Tricks Job Aid for a full listing of Best Practices and Tips and Tricks. The job aid is located on the Training Help page under Help Documents.

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.

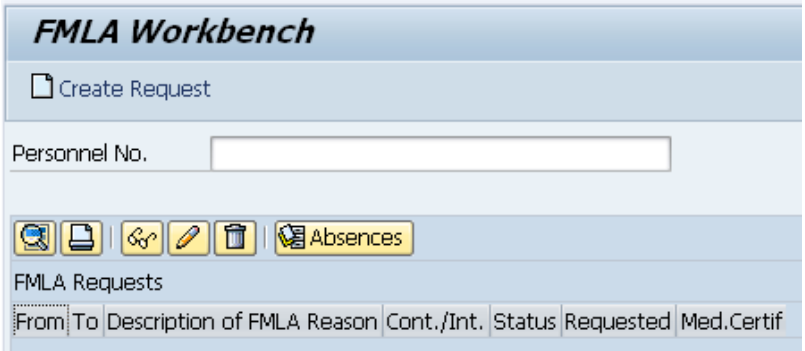
Information

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**.

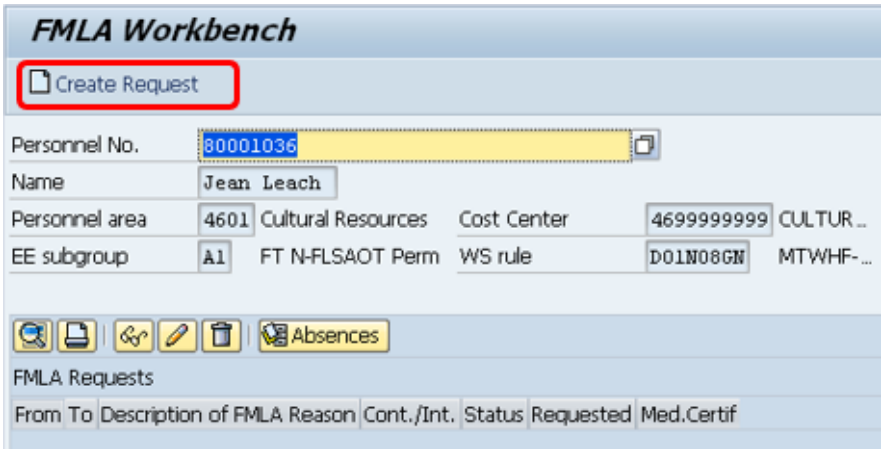


3. Update the following field:

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.

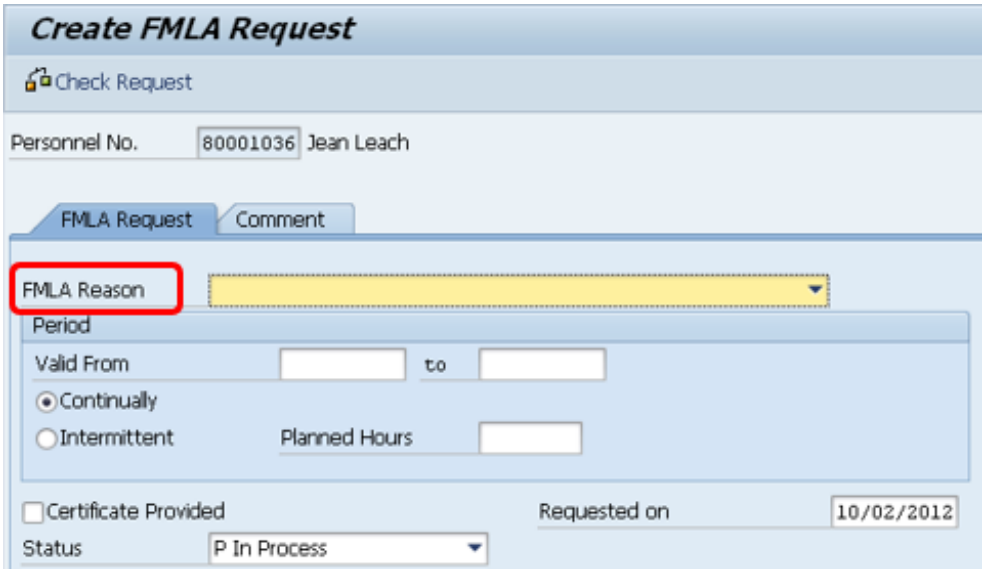


Select one of the following options:

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 eight 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
   - Military Qualifying Exigency
   - Military Caregiver

   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:

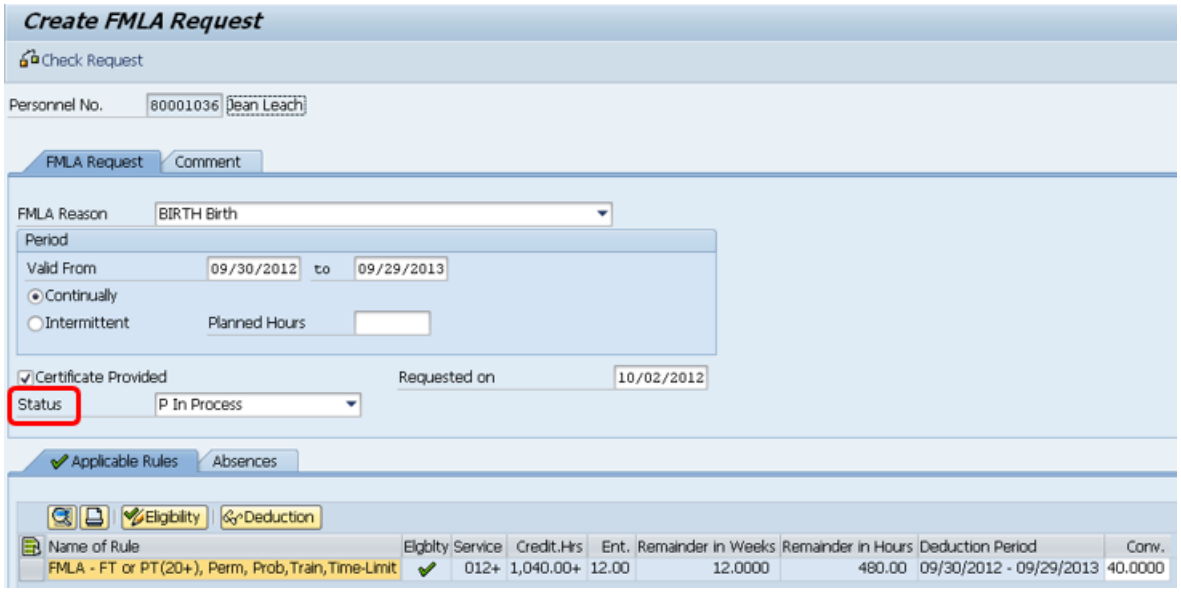
Field Name	Description	Values
Valid from	Beginning date of the specified date range	Enter value in Valid from. **Example**: 9/30/2012
To	Ending date of the specified date range	Enter value in To. **Example**: 9/29/2013

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.



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.

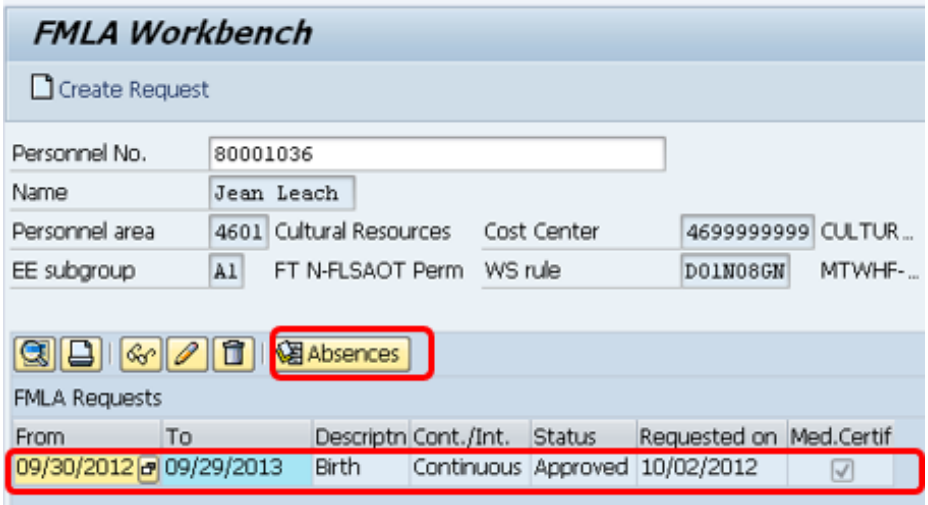
    The FMLA request must be approved before absences can be associated with the event.

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.



15. Update the following field:

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

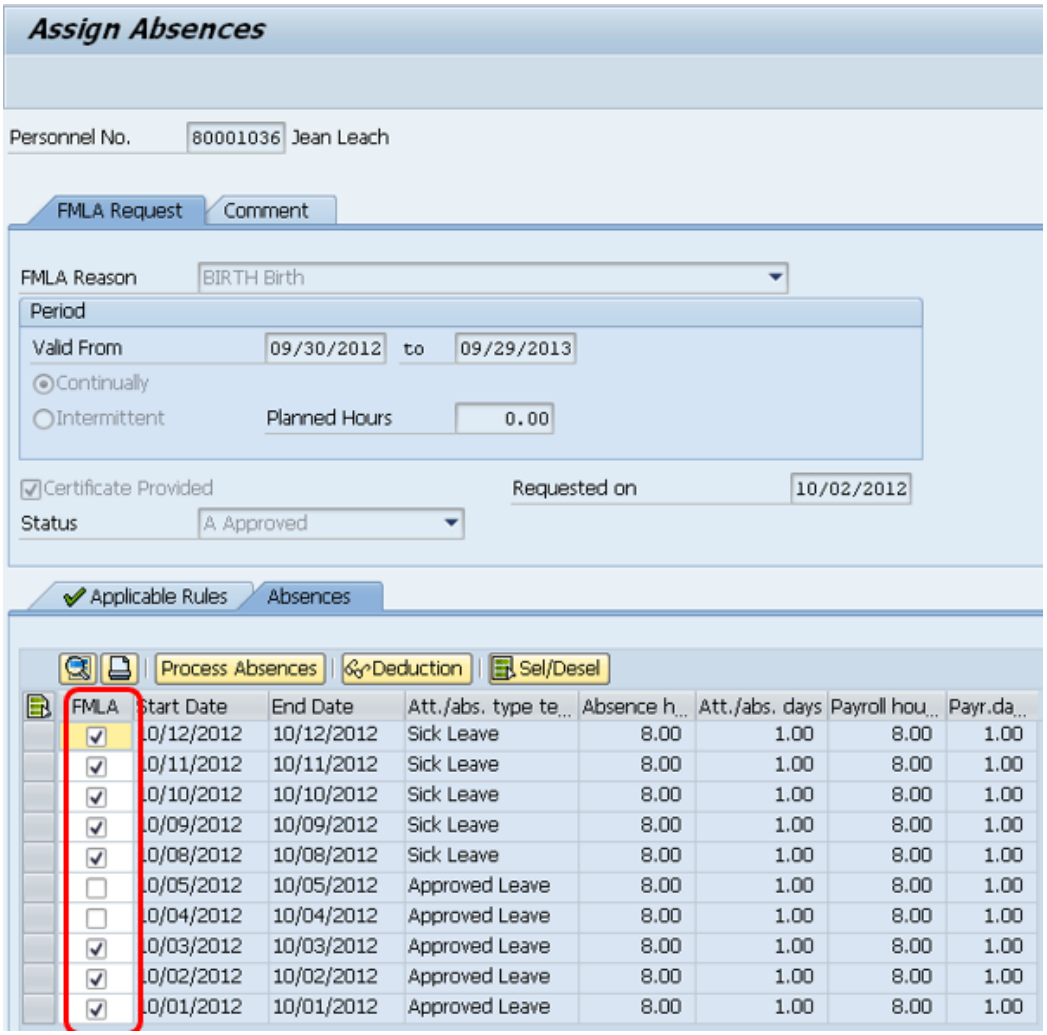
16. Select (highlight) the applicable event.
17. Click the **Absences** button.

Information

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

Each FMLA Reason has a limited set of Absence Codes that will appear in this list. The list is further defined by the employee's personnel subgrouping (Temporary, Non-Leave Earning or Regular). Click the link below to access tables with this specific information:

FMLA Reason Absence Assignment



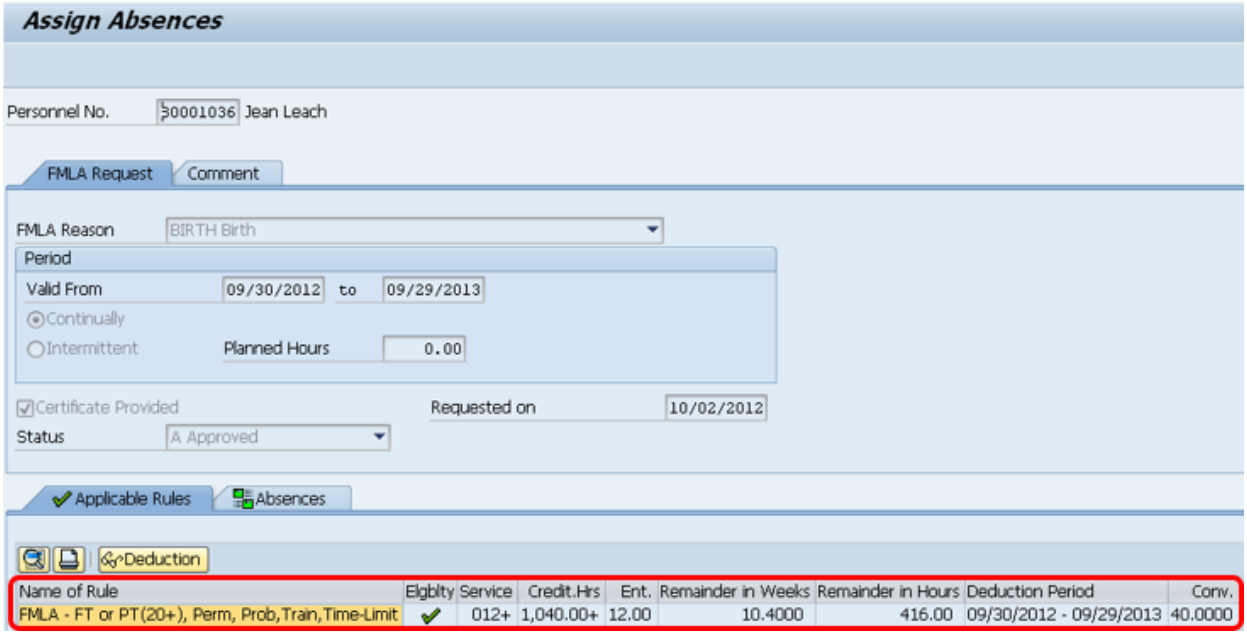
18. Click the **checkbox** for any applicable absences.

    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.

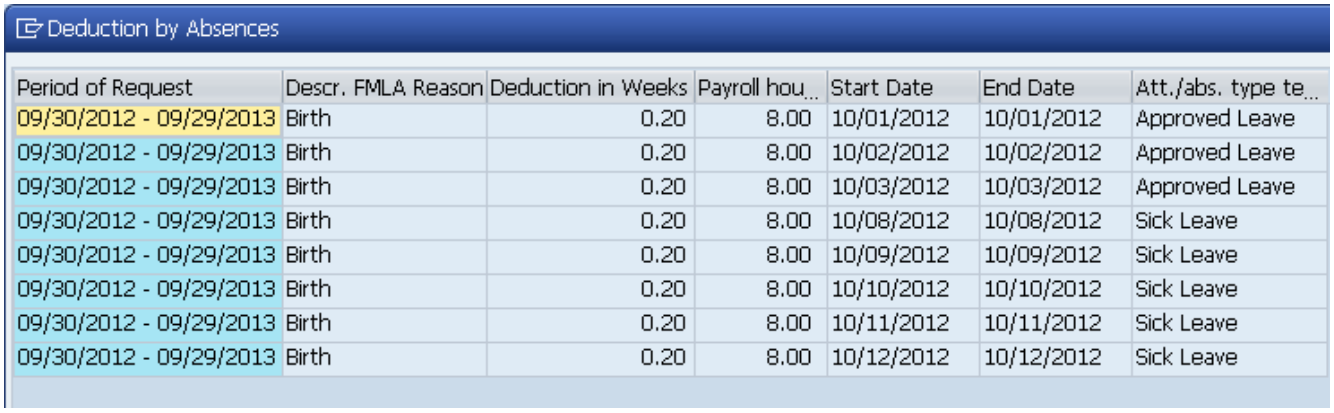
    In this example, it was determined that the Approved Leave absences on 10/4 and 10/5 were not applicable.

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** Applicable Rules tab.



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



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