

# Managing Family Medical Leave

## Entering FMLA Leave Requests

**Description:** The FMLA (Family Medical Leave Act) protects benefits and jobs for employees who take a leave from work to care for themselves or family members. This law contains provisions regarding employer coverage, employee eligibility and entitlement, notice and certification, continuation of health benefits, and job restoration. This process describes entering leave requests, determining eligibility, tracking time and tracking activity in the MaineStreet Family Medical Leave module.

**Navigation:** [Main Menu](#) > [Benefits](#) > [Track FMLA \(Family Medical Lv\)](#) > **Request/Authorize/Track Leave**

Favorites | Main Menu > Benefits > Track FMLA (Family Medical Lv) > Request/Authorize/Track Leave

Request | Eligibility | History | Activity

**Nikki Curthoys** Person ID: 0042555

FMLA Leave Find | View All First 1 of 1 Last

FMLA Request ID: 001

**Request**

\*Request Date: 04/16/2013 \*Begin Date: 05/10/2013

\*Return Date: 07/22/2013  Expected/Open  Actual/Completed

Time Requested: 9 Time Requested (Units): Weeks

\*Leave Reason: Birth or Adoption Leave Type: Continuous

**Approval**

Approval Status: Open Reason Denied:

Approver: Apprvl Dt:

Leave Canceled On:

### FMLA Request ID

Displays an initial default value of NEW. When the request is saved, the system assigns a unique FMLA request ID. IDs are assigned sequentially from 001 to 999 within each employee record.

**Note.** If you are processing employees with multiple jobs, FMLA Administration does not use the employee record number. The system tracks FMLA leave requests by individual employees rather than by job.

## ***Request***

### **Request Date**

Enter the date on which the employee made the FMLA-protected leave request.

### **Begin Date**

Enter the first day of the employee's requested leave.

The system uses the begin date for any record that requires an effective date. Because eligibility and entitlement can be affected when the begin date is edited, you cannot edit it after the request's approval status changes to approved or denied, or after the request has been completed or canceled.

To change the begin date after one of these events has taken place, change the approval status back to open, edit the begin date, recalculate eligibility and entitlement with the Leave Request Eligibility page, and manually adjust the leave schedule.

### **Return Date**

Enter the date that the employee is scheduled to return from leave. The return date is not the day of FMLA protected leave, but rather the first day of work after the leave is completed.

- Select *Expected/Open* if the request is still pending or in process.
- Select *Actual/Completed* when the employee actually returns from leave.

### **Time Requested**

For reference only.

### **Leave Reason**

Select the appropriate leave reason.

### **Leave Type**

Indicate the regularity of the requested leave.

- *Continuous* leave is unbroken full-day leave.
- *Intermittent* leave is broken, but on a regular schedule, for example, every Thursday and Friday for eight weeks.
- *Irregular* leave involves unspecified times during the planned leave period. No Intermittent Form required by employee.

**Note.** If you change this field after the leave is completed, the system displays a warning.

## ***Approval***

### Approval Status

Specify whether the leave request is approved. When you select Approved or Denied, the system automatically populates the Approver and Apprvl Dt (approval date) fields with your employee ID and the current date.

*Open: Leave in Open status if tentatively approved pending medical documentation or if leave has not been approved or denied.*

**Note.** You can approve requests for employees determined to be ineligible for FMLA coverage.

### Leave Canceled On:

If the employee cancels the leave request before taking any leave, enter the date of this decision.

Do not use this field to indicate denial of the request or to record the employee's early return from leave.

## Determining Eligibility

### Eligibility

Favorites | Main Menu > Benefits > Track FMLA (Family Medical Lv) > Request/Authorize/Track Leave

Request | Eligibility | History | Activity

**Nikki Curthoys** Person ID: 0042555

Request ID: 001 \*Begin Date: 05/10/2013 Return Date: 07/22/2013  
Reason: Birth Status: Expected/Open

\*FMLA Plan ID: FED Fed FMLA FMLA Year Begin Date: 05/10/2013

Eligibility and Entitlement Date of Last Determination: 07/09/2013

Eligibility Determination		Entitlement Determination	
FMLA Eligible Hours:	2086 <input checked="" type="checkbox"/> Eligible	As of Requested Begin Dt:	12.0 480.0
FMLA Eligible Serv Weeks:	100 <input checked="" type="checkbox"/> Eligible	As of Expected Return Date:	

Job and Employment Data

Original Hire Date:	06/15/2011	Std Hours / Week:	40.00
Officer Code:	None	Std Hours Override:	

### FMLA Plan ID

Enter FED.

### Eligibility and Entitlement

Click to start the eligibility and entitlement processes. These processes use employee job history, the FMLA plan parameters, payroll data, and data on the Request page to populate

all of the other fields on the Eligibility page with the exception of the Std Hours Override (standard hours override) field.

**Note.** The Eligibility and Entitlement button is not available if the prerequisite data for the leave request is not entered in the Request page. It is also unavailable if the request's status is completed, denied, or canceled.

### **FMLA Eligible Hours**

Displays the results of the system's determination of the employee's FMLA eligible hours. The eligible hours are defined as the hours worked during the 52 weeks before the leave effective date. The system determines the eligible hours using Payroll data. The system selects the Eligible check box if the employee has worked enough hours to be eligible for FMLA protected leave.

**Note.** The Eligible check boxes are indicators of the system's determination based on the FMLA plan rules, and are informational only. They have no effect on your ability to approve or deny the request.

### **FMLA Eligible Serv Weeks**

Displays the results of the system's determination of the employee's FMLA eligible service weeks. FMLA Administration determines service weeks using information from the employee's job history and the rules for the associated FMLA plan. The system selects the Eligible check box if the employee has worked enough service weeks to be eligible for FMLA-protected leave.

### **As of Requested Begin Dt**

Displays the weeks and hours of FMLA protected leave that the employee is entitled to as of the leave's begin date. To determine whether the request can be approved, compare the values displayed here to the time requested in the employee's FMLA-protected leave request.

### **As of Expected Return Date:**

Displays the weeks and standard hours of entitled protected leave remaining for the employee in the current FMLA year as of the leave's expected return date.

### **Original Hire Date, Officer Code, and Std Hours / Week:**

The Job and Employment Data group box displays basic job and employment information for the employee as of the leave effective date and the last determination of eligibility and entitlement.

The system enters the average number of hours that the employee works per workweek as of the leave effective date in the Std Hours/Week field.

### **Std Hours Override:**

Sometimes system-computed standard hours values are not accurate. Employees often request leave well in advance of their leave's begin date, and part-time employees' weekly hours can be variable. Enter a new value when appropriate.

**Note.** This field does not affect eligibility or entitlement-- the system uses it only to more accurately convert between the display of weeks and hours.

## Scheduling FMLA Leave Manually

### History

Favorites | Main Menu > Benefits > Track FMLA (Family Medical Lv) > Request/Authorize/Track Leave

Request | Eligibility | History | Activity

**Nikki Curthoys** Person ID: 0042555

Request ID: 001 \*Begin Date: 05/10/2013 Return Date: 07/22/2013  
Reason: Birth Status: Expected/Open

Leave Summary			Entitlement Summary		
Scheduled:	Weeks:	Hours:	As of Leave Begin:	Weeks:	12.0 Hours: 480.0
Taken Today:	Weeks:	Hours:	Remaining Today:	Weeks:	12.0 Hours: 480.0

Mark days below for paid hours

Week Begin Date	Sunday	Monday	Tuesday	Wednsdy	Thursday	Friday	Saturday	Total Hrs
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

### Leave Summary

Tracks the weeks and hours of FMLA-protected leave that are scheduled and that have already been taken.

### Entitlement Summary

Tracks the total amount of FMLA protected leave that the employee is entitled to (for all leaves, including the current one).

### Schedule Leave

Click to create template schedules for repeating leave.

### Mark Paid Leave

Click to designate a portion of the FMLA leave as paid leave.

### Week Begin Date and Sunday through Saturday

Enter the start date of each scheduled week of FMLA-protected leave and the hours of leave for each leave day. To specify certain days of leave as paid leave, select the check box for those days. (Some employers require that employees use paid leave before they can use FMLA leave.)

**Note.** You can use these fields to manually schedule a leave request on a day-by day basis. You can also use it to adjust a previously scheduled leave. If you use the automatic scheduling capabilities of the Schedule Leave Days and Mark Paid Leave pages, keep in mind that the system overwrites previously scheduled days with the template schedules that you design through these pages.

## **Scheduling Repeating Weekly Leaves**

### ***Schedule Leave Days***

#### **Weekly Template**

Enter the number of hours for each day in the schedule.

#### **Repeat Template From and Through**

Enter the begin and end dates during which you want the schedule to repeat. The leave request's scheduled begin and return dates are the defaults.

#### **Repeat Template For**

Select a time period for the schedule to repeat. If you select an option other than *Every Week*, you can plan the intervening weeks with separate rounds of scheduling.

For example, if you have an employee with four weeks of FMLA leave, you can schedule the first and third weeks with one Schedule Leave Days template that repeats for every other week and starts on the first day of the first week. You can then schedule the second and fourth weeks with another template.

#### **Entitlement**

Displays the weeks and hours of FMLA leave that the employee is entitled to.

#### **Scheduled**

Displays FMLA leave hours currently scheduled for the employee.

#### **Unscheduled**

Displays FMLA leave weeks and hours remaining for the employee. This value can be negative if more hours are scheduled than are available to the employee.

## **Designating Paid Leave Days for Repeating Schedules**

### ***Mark Paid Leave***

#### **Summary of Paid Leave Accrued**

Displays the various leave plan types and the hours accrued by the employee. The accrual date is current as of, and based on, the date when the employee's FMLA leave request was

submitted, which means that the Hours Accrued values might be inaccurate by the begin date of the leave.

**Mark first** (mark first [number of] scheduled days [number of hours] as paid leave)

Enter the number of days to be considered as part of the employee's paid leave. The system assumes that the paid leave days are substituted only for the beginning of the leave. Only whole eight-hour days can be marked as paid leave days. The number of scheduled hours represented by those days can be compared with the leave accrual balances, which are always calculated as hours. When you enter a certain number of days in this field, the number of hours that they represent appears in the (Hrs) box.

When you return to the History page, days that you selected as paid leave days have their check boxes selected.

### Tracking FMLA Activity

You can record significant events that affect FMLA leaves, such as employee inquiries, requests for extensions, and the sending and receiving of notices and medical documents. This information is for reference only; it does not affect processing.

### Activity

**Request**

Person ID: 0042555

Request ID: 001 \*Begin Date: 05/10/2013 Return Date: 07/22/2013  
Reason: Birth Status: Expected/Open

Leave Summary			Entitlement Summary		
Scheduled:	Weeks:	Hours:	As of Leave Begin:	Weeks:	Hours:
Taken Today:	Weeks:	Hours:	Remaining Today:	Weeks:	Hours:

*Activity Date	*Activity Type	Follow up Required	Long Description
07/01/2013	EE Inquiry	<input checked="" type="checkbox"/>	Spoke w/ ee on phone; she anticipates LOA w/o
04/16/2013	Comments	<input type="checkbox"/>	FML Paperwork Received

### Activity Date and Activity Type

More than one activity type can occur on the same date, but only one type can be entered per dated row.

### Follow Up Required

Specify whether the activity requires follow-up action (as in the case of requests for medical certification, for example).

**Note.** This is informational. You can create queries against this field to report upcoming events.

***Comments***

*Add Activity with the effective date = to beginning of the month following start of leave with follow-up box checked which is when the Irregular/Intermittent Form is expected; once received, add another entry with the first of the 2nd month following start of leave with follow-up box checked; so on and so on.*

***MedCert***

*If leave is for an Employee Illness expected to be longer than 20 days, add Activity with the effective date = to the expected return date, Long Description = RTW required" with follow-up box checked. Once the form is received, uncheck the Follow-up Required box.*



## Additional Resources:

### Monitor And Change (MAC) Messages:

#### Employee on FML is nearing or has past 12 week period.

- Criteria: FML identified in Job record with no return from leave or termination activity with more than 60 days elapsed since FML.
- Reason: Employees are only eligible for 12 weeks of FML.
- Implication: Violation of UMS policies and invalid reporting.

#### Actions by Campus HR Staff:

1. Verify and add Job row to return from FML or change to Health-Non-FML accordingly
2. Notify April to remove message for employee if there is a special situation.

#### FML: Employee's Expected Return-to-Work Date has gone by.

- Query: UMS\_MAC\_BN\_FML\_RTW\_DT\_PAST
- Criteria: Approved/Open FML request with an Expected Return to Work Date that has gone by EXCLUDING (pending ADA interactive process):
  - Activity Type = Extension
  - Follow-up = Yes
  - Description = %ADA%
- Reason: To update FML & Job records to reflect the accurate ACTUAL return-to-work date.
- Implication: Inaccurate records resulting in possible non-compliance with Family Medical Leave policies.

#### Actions by EBC/Campus Staff:

1. Contact employee and/or supervisor to confirm/verify return-to-work status.
2. Update FML Request Tracking with either:
  - a. An updated Expected RTW date
  - b. Update request to Actual/Completed

#### FML: Request not Approved nor Denied.

- Query: UMS\_MAC\_BN\_FML\_MEDCERT\_DUE
- Criteria: Open FML request
- Reason: To update FML & Job records to reflect the Approval or Denial of request.
- Implication: Inaccurate records resulting in possible non-compliance with Family Medical Leave policies.

#### Actions by EBC/Campus Staff:

1. If appropriate documentation is not received within 15 days of start of leave (or provisional approval, whichever is greater), then status should be changed to Denied and employee must be notified.

2. Update FML Request Tracking to Approved or Denied with appropriate Denial Reason

**FML: Return to Work Certification Required.**

- Query: UMS\_MAC\_BN\_FML\_RTWCERT\_DUE
- Criteria: Leave extends beyond 20 days and Activity=MedCert with follow-up box unchecked and description contains "RTW" does not exist EXCLUDING (pending ADA interactive process):
  - Activity Type = Extension
  - Follow-up = Yes
  - Description = %ADA%
- Reason: To update FML & Job records to reflect the receipt of a Return to Work Certification.
- Implication: Inaccurate records resulting in possible non-compliance with Family Medical Leave policies.

Actions by EBC/Campus Staff:

1. Follow-up with employee who has returned to work to obtain Return to Work Certification.
2. Update FML Request Tracking Activity once RTW Cert has been received:
  - a. Uncheck follow-up required in MedCert row with "RTW" in Description OR
  - b. Add Activity=MedCert, uncheck follow-up required with "RTW" in Description

**FML: Follow-up Required.**

- Query: UMS\_MAC\_BN\_FML\_FOLLOWUP\_REQ
- Criteria: FML Activity page has box checked for Follow-Up required and the effective date has past.
- Reason: To monitor and manage anything requiring follow-up such as when Workers Comp leave should stop accruing leave.
- Implication: Inaccurate records resulting in possible non-compliance with Family Medical Leave policies.

Actions by EBC/Campus Staff:

1. Navigate to FML Tracking page and review the Comments on the Activity page requiring follow-up.
2. Once follow-up has been completed, uncheck the Follow-Up box to resolve the MAC message.

**FML: MON/BWK Paid Leave of Absence with less than 80 leave hours; May need to update to Unpaid LOA.**

- Query: UMS\_MAC\_BN\_FML\_MEDCERT\_DUE
- Criteria: Job = Paid Leave of Absence with a combined disability, annual and comp Leave balance less than 80 hours; employees approved for STD and FML at the same time are not required to use disability leave

- **Reason:** To update Job record to reflect transition from Paid to Unpaid.
- **Implication:** Monthly-paid employees on paid leave for a medical reason should report full disability leave. For days in which disability leave is not entered, the employee automatically will get paid Regular pay which is incorrect. For both monthly and biweekly paid employees, the transition from paid to unpaid leave will stop future leave accruals from being processed.

Actions by EBC/Campus Staff:

1. First check Liberty Mutual to see if approved for Short-term Disability. If yes,
  - a. Add an Activity on the Activity tab of the FML tracker using Activity Type = Comment and in the Long Description, enter "STD approved". This will remove this message for this person.
  - b. Adjust Monthly-paid employees pay during the period of paid leave in which they do not enter disability leave.
2. Figure out when the employee will exhaust all paid leave balances (employees may opt to keep 40 hours of annual leave) and update Job to indicate unpaid Leave of Absence.

**FML: History page must not be blank to appropriately track FML usage/balance.**

- **Query:** UMS\_MAC\_BN\_FML\_NO\_HISTORY
- **Criteria:** No data on the History tab of the tracker.
- **Reason:** To update tracker with leave usage for proper tracking.
- **Implication:** Without the History usage, the system is not tracking and the employee appears to have not used any FML.

Actions by EBC/Campus Staff:

1. Navigate to History tab of FML Tracker and update appropriately. See [History](#).

**FML: Update Job with Paid or Unpaid FML.**

- **Query:** UMS\_MAC\_BN\_FML\_MISSING\_JOB
- **Criteria:** Missing corresponding Job row indicating Leave of Absence.
- **Reason:** To update Job data with Leave of Absence status.
- **Implication:** Leave of Absence reports and tracking will be inaccurate without appropriate updates to Job records for employees on leave of absences. RiseUp processing is also based on leave or active status.

Actions by EBC/Campus Staff:

1. Update Job record accordingly.

**FML: entered in Job but not in Tracker**

- Query: UMS\_BEN\_FML\_NO\_TRACKING
- Criteria: Job record indicating FML Leave of Absence - missing corresponding FML Tracker instance
- Reason: To update FML Tracker with Leave of Absence details.
- Implication: Proper and accurate tracking of FML status and usage is critical for compliance.

Actions by EBC/Campus Staff:

1. Update FML Tracker record accordingly.

**FML: Request not Approved nor Denied.**

- Query: UMS\_MAC\_BN\_FML\_MEDCERT\_DUE
- Criteria: FML tracking instance that is not Approved
- Reason: To track pending receipts of Medical Certifications (Tracker is not set to “Approved” until supporting medical documentation is received. Tentative approvals pending receipt of Med Cert are left in Open status.
- Implication: Proper and accurate tracking of medical certifications.

Actions by EBC/Campus Staff:

1. Follow up with employee for Med Certs due
2. After the employees’ deadline to provide the Med Cert has past; leave request may be denied.

**FML: Return to Work - Update Job record accordingly.**

- Query: UMS\_MAC\_BN\_FML\_RTW\_MISSING\_JOB
- Criteria: FML tracking instance that has actual return to work date with no corresponding Job update
- Reason: To assist with keeping tracker and Job records aligned for reporting and tracking purposes.
- Implication: Proper and accurate tracking of medical leaves of absences.

Actions by EBC/Campus Staff:

1. Update Job record with return from leave as appropriate.

**Query:**

**UMS\_BEN\_FM\_LEAVE\_REQUESTED**

Enter appropriate Business Unit. Output will include information entered in FML tracking module for the specified Business Unit.