Cabarrus County

FMLA

Timesheet Changes and FMLA Integration

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OVERVIEW

Project Background and Description

FMLA time is currently maintained via manual input into the appropriate MUNIS accrual table for each employee. The manual entry is performed by Human Resources staff or super-users. It was always the intention, when implementing FMLA tracking in MUNIS, to eventually incorporate the collection of FMLA hours on the timesheet. FMLA time on the timesheet will be noted by the employees. The current manual process will be retained for making adjustments and corrections to the employee FMLA accruals.

For additional information, please refer to the *FMLA Implementation Guide for HR document*.

Project Scope and Objectives

Modify Timesheet application, Payroll Transfer file creation, and specific reports to account for FMLA time used.

High Level Requirements

Timesheet – modify to include means of noting FMLA usage
Payroll / Time Transfer File for Import into MUNIS – modify program to include FMLA data, generate e-mails as indicated
Timesheet Report – modify to include a section for Employees with FMLA time
Department Reports – Modify to include FMLA accruals in addition to the current Vacation, Sick, Comp, etc accruals

Affected Parties

Users / employees
Supervisors, department heads, and super-users
Human Resources
Finance - Payroll

Affected Business Systems or Processes

Timesheet and Payroll Transfer file
Departmental Reports
MUNIS Payroll (import and processing) and MUNIS Payroll Accruals

Specific Exclusions from Scope

Any reports and processes not specifically listed. There are no new reports in this project. New reports can be developed at a later date. Of existing reports, only those specifically defined in this document will be changed for the new FMLA requirements..

High-Level Timeline /Schedule

Development completed by May 15, 2015
Testing from May 15, 2015 through the end of June 2015
Go Live – first timesheet created on or after July 1, 2015

PROJECT TEAM

Clients / Stakeholders

Name	Role	Location	E-mail	Phone / Ext
Lundee Covington	Sponsor	GC-HR	llcovington@cabarruscounty.us	
Ryane Patterson	Payroll Lead / Guidance	GC-Finance	RLPatterson@cabarruscounty.us	

Technical Resources

Name	Role	Location	E-mail	Phone / Ext
Michelle D. Willey	Project Manager/BSA	GC-ITS	mdwilley@cabarruscounty.us	2158
Claire Payne	Technical Lead/Developer	GC-ITS	dcpayne@cabarruscounty.us	

RESOURCES

Assignment of responsibility as follows:

Michelle D. Willey	Create project plan
Claire Payne	All technical development in the project Timesheet changes Transfer file Payroll and Timesheet Reports Departmental Reports Automated E-mails
Ryane Patterson	Creation of the FMLA Pay Code in MUNIS Guidance during design and development Testing
Lundee Covington	Review of design Approval of works FMLA / HR Guidance for development Testing End user training / guidance
Brandon Elrod	Review of design FMLA / HR Guidance for development Testing End user training / guidance

PROJECT DESIGN / FUNCTIONAL SPECIFICATION

Overview of Required Changes and Additions

MUNIS

Create a pay code, of type non-cash, to be used in the Payroll Transfer File for reporting FMLA time to MUNIS.

Timesheet

Modify the existing Timesheet program to perform the following functions:

- Collect FMLA time
- Validate FMLA time
- Report FMLA time in the Payroll Transfer file

Payroll Transfer File

Create/include pay records specific to FMLA time in addition to and distinct from other time. There is no change to the structure of the file or records within the file. The file will include records containing the FMLA Pay Code and hours.

At the time the Payroll Transfer file is created, warning e-mails should be created for a number of conditions and routed to the HR general e-mail address.

Department Reports

Any reports which currently show the accrual or usage of vacation, sick, holiday, comp, LWOP, or workman's comp hours must also show the usage of FMLA hours.

Generate Automatic E-mails

Generate automated e-mails to the HR generic e-mail box for a variety of FMLA related scenarios.

- Employee selects FMLA on the timesheet
- Employee has FMLA qualifying conditions
    - Three or more sick days
    - Workman's Comp time

Parameters

- **Qualifying Time / Qualified Time** – the following types of time are considered qualifying time for the purposes of FMLA calculations: Vacation, Sick, Comp, Wrkman Comp, LWOP, and Holiday.

- FMLA is assigned a non-pay type pay code, time for FMLA is accrued to this pay code

- Time for FMLA is accrued **in addition** to other pay type accruals, but there is no additional pay amount for FMLA.

- If the FMLA box on a line of the timesheet is checked, then each of the following pay types are considered FMLA accrual **in addition** to their standard accrual: sick, vacation, holiday, comp, LWOP, workman's comp.

- If the FMLA box is checked on the day prior to and the day following a holiday, then the holiday pay is considered FMLA in addition to holiday pay, even if the FMLA box is not checked on the holiday line. It is possible to check back on the previous time sheet to see if holiday can be counted, but checking forward in time when the holiday /FMLA spans a pay period is not possible, obviously. **Any** FMLA action will be noted by an e-mail to HR. This will allow HR to make the necessary adjustments as needed.

- If the employee checked the FMLA check box, then ALL time in sick, vacation, holiday, comp, workman's comp and LWOP are added together and reported under the FMLA pay code. The FMLA is reported **in addition** to the other pay codes. It does not replace them in any way.

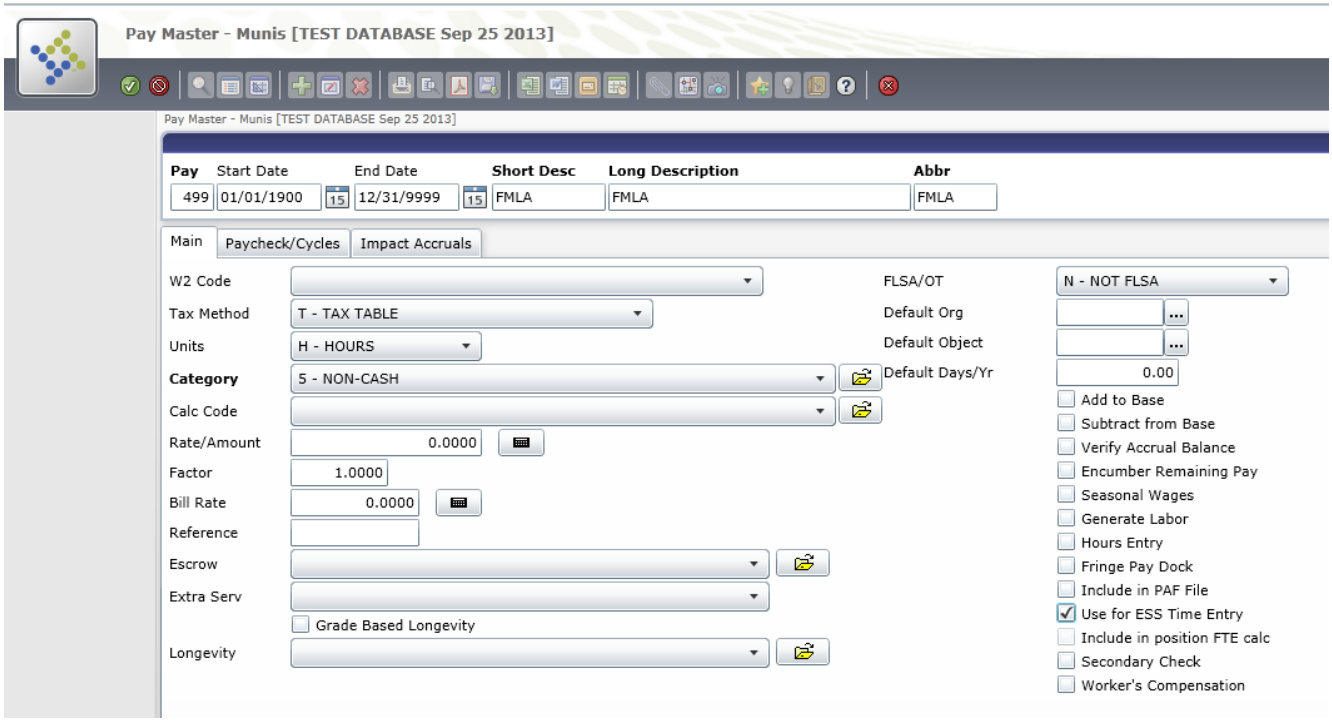
- Manual adjustments to the FMLA accruals will still be required, particularly for the following circumstances:
    - Employee had an FMLA event (example: hospitalization) but did not notify HR or update timesheet
    - Employee selected FMLA on the timesheet for non-FMLA qualified time
    - Employee begins marking FMLA time while HR is reviewing the case and FMLA is later denied

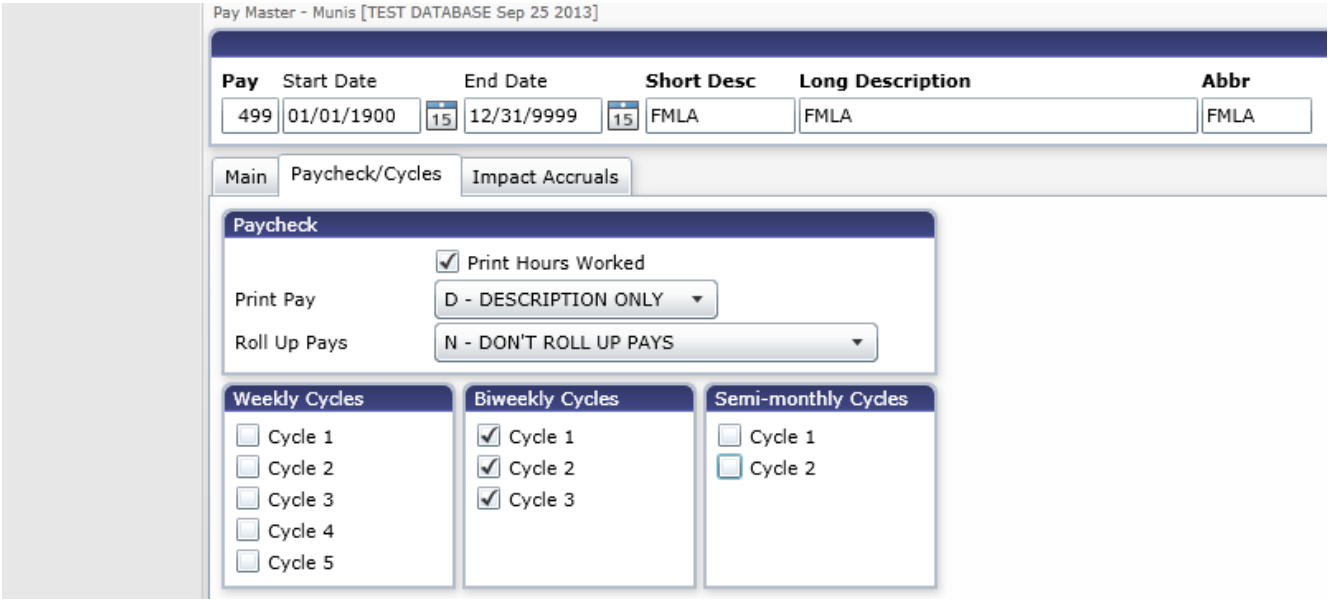
- Nothing in this project or subsequent development prevents or precludes the necessity of updating FMLA accruals manually or making adjustments to FMLA time

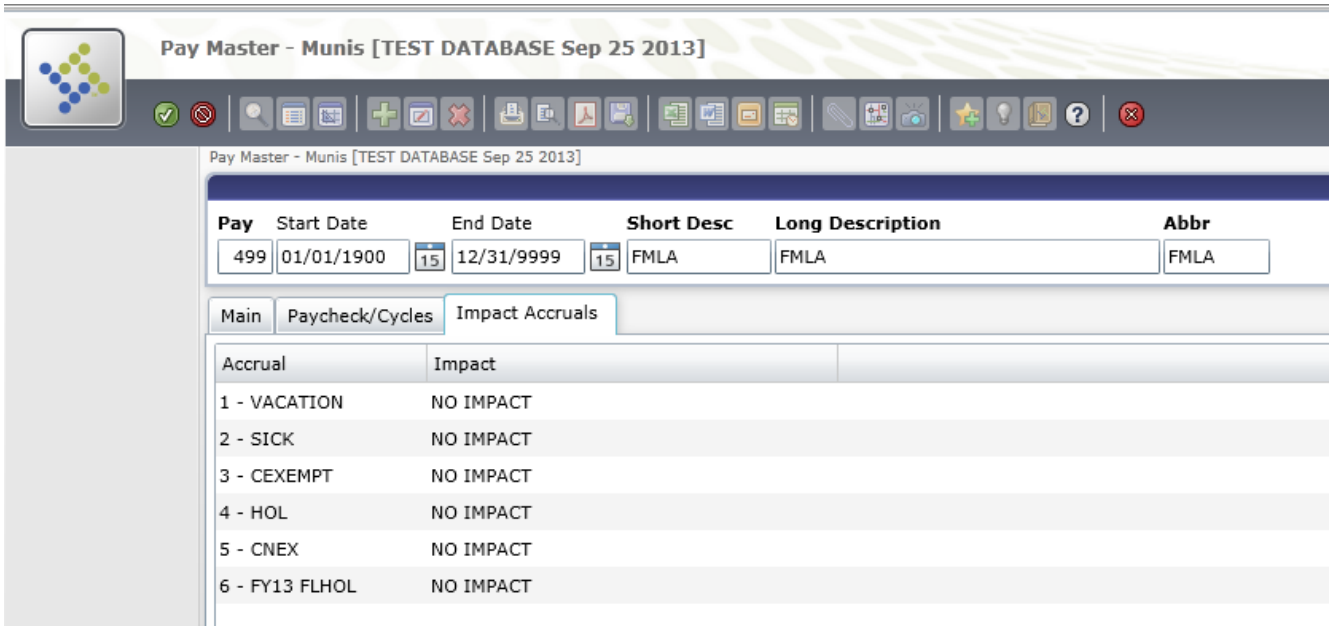
FMLA Pay Type Code (MUNIS)

The Pay Type code determines how the hours captured in the Timesheet program and transmitted to the MUNIS payroll module via the Payroll Transfer file are to be accrued for the employee. If payroll automation is to be implemented, a pay type code must be created for FMLA. Define as non-cash.

MUNIS → Human Resources/Payroll → Payroll → Payroll Setup → Pay Master

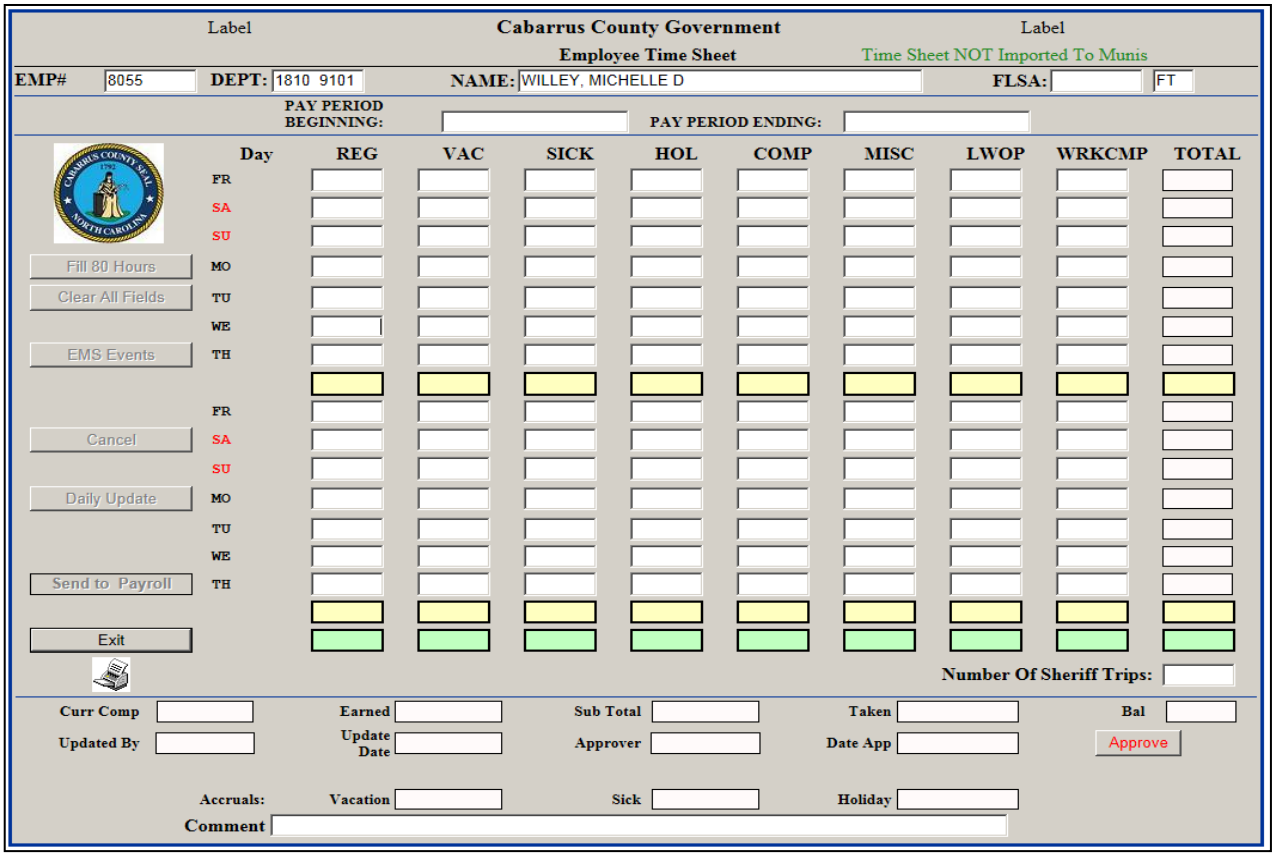





Pay Master - Munis [TEST DATABASE Sep 25 2013]
Pay Master - Munis [TEST DATABASE Sep 25 2013]
Pay
Start Date
End Date
Short Desc
Long Description
Abbr
499
01/01/1900
12/31/9999
FMLA
FMLA
FMLA
Main
Paycheck/Cycles
Impact Accruals
Accrual
Impact
1 - VACATION
NO IMPACT
2 - SICK
NO IMPACT
3 - CEXEMPT
NO IMPACT
4 - HOL
NO IMPACT
5 - CNEX
NO IMPACT
6 - FY13 FLHOL
NO IMPACT

Modify Timesheet (Timesheet)

Current timesheet:



Label | Cabarrus County Government | Label

Employee Time Sheet | Time Sheet NOT Imported To Munis

EMP# 8055 DEPT: 1810 9101 NAME: WILLEY, MICHELLE D FLSA: FT

PAY PERIOD BEGINNING: PAY PERIOD ENDING:

Day	REG	VAC	SICK	HOL	COMP	MISC	LWOP	WRKCMP	TOTAL
FR									
SA									
SU									
MO									
TU									
WE									
TH									
FR									
SA									
SU									
MO									
TU									
WE									
TH									

Fill 80 Hours | Clear All Fields | EMS Events | Cancel | Daily Update | Send to Payroll | Exit

Number Of Sheriff Trips:

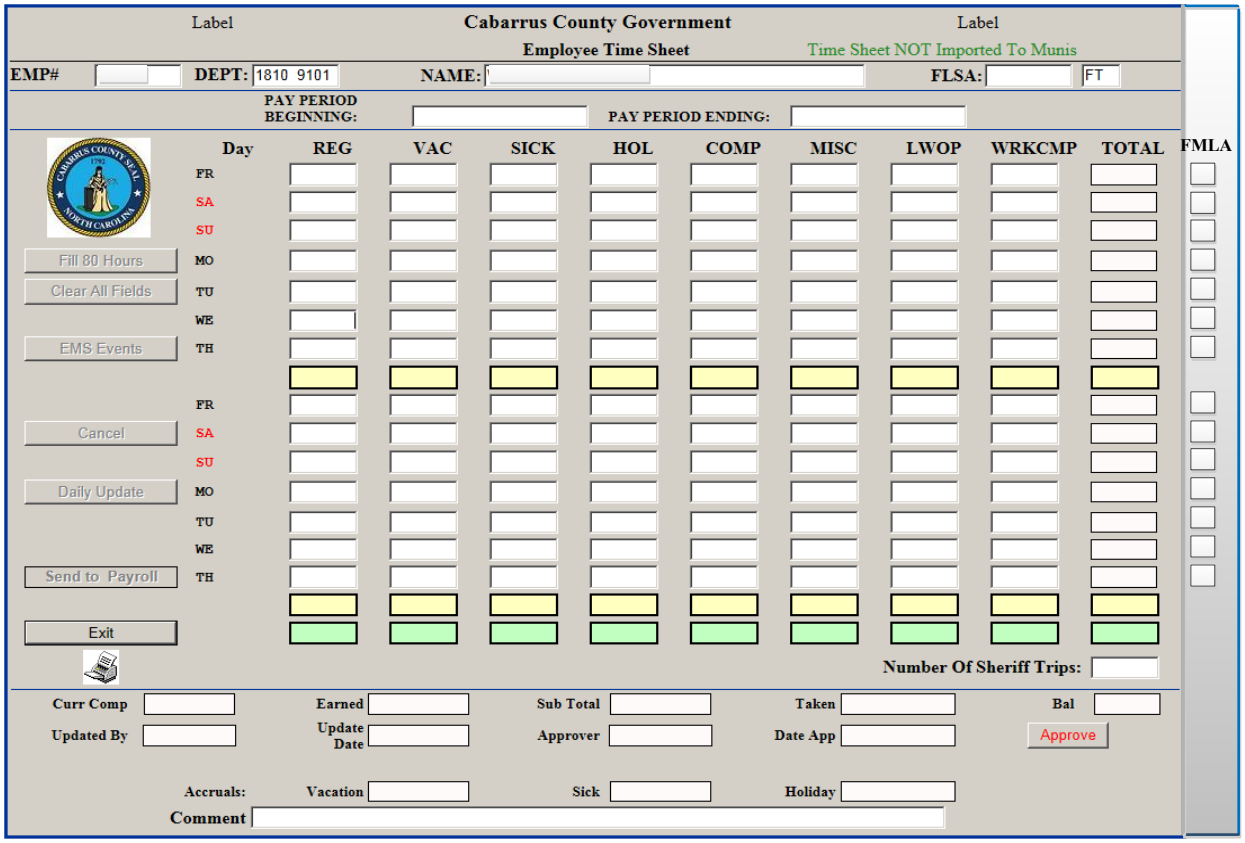
Curr Comp | Earned | Sub Total | Taken | Bal

Updated By | Update Date | Approver | Date App | Approve

Accruals: Vacation | Sick | Holiday

Comment

Modified Timesheet:



Validation Potential:

A Personnel Action Code of FMLA is entered for an employee who may be eligible for FMLA. There is a checklist and approval process (business rules) associated with this action. Once the action has been approved and the employee proven qualified for FMLA, the Approval Date field of the Personnel Action record would be updated appropriately. An approval date which is on or before the end of the timesheet ending date (but no older than current end date – 364 days) would validate the employee's eligibility for FMLA.

Do not prevent an employee from selecting the FMLA checkbox if any Qualified time is entered (vacation, sick, holiday, comp, lwop, wrkcmp).

Modify Payroll Transfer File (Payroll Transfer)

Currently the custom timesheet application developed by C. Payne handles standard pay types. FMLA modifications require a check box be added to the timesheet program. The format and layout of the file remains unchanged. However, new records will be added for FMLA as needed.

If the FMLA box of the timesheet is checked, then each of the following pay types are considered FMLA accrual **in addition** to their standard accrual: sick, vacation, holiday, comp, LWOP, workman's comp.

If the FMLA box is checked on the day prior to and the day following a holiday, then the holiday pay is considered FMLA in addition to holiday pay, even if the FMLA box is not checked on the holiday line.

If the employee checked the FMLA check box, then ALL time in sick, vacation, holiday, comp, workman's comp and LWOP are added together and reported under the FMLA pay code. The FMLA is reported **in addition** to the other pay codes. It does not replace them in any way.

If the FMLA box is checked and there are only Regular Hours, then the FMLA box is ignored and the user alerted that FMLA does not apply. It is possible for an employee to have both Regular Hours and FMLA hours, but regular hours are not the same as FMLA hours. For example: Employee can work a half day and take a half day of sick leave, checking the FMLA box. Four hours would accrue to regular time, four hours would accrue to sick time, and four hours accrue to FMLA.

```
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```

Sample of the current file shown above, social security numbers masked. In the example above pay type 400 is for paid sick leave. If the employee had checked the FMLA box on the modified timesheet, the pay record for pay type 400 would still be present in the file, but a second pay record for the FMLA type would also be present – with the same amount of time as listed in the pay type 400. Both Sick leave accrual and FMLA accrual will be affected.

There will be one FMLA record for each day the timesheet FMLA checkbox is checked instead of one record with summary FMLA time for each pay week. One record per day, not one record per week or per pay period. This should allow for better auditing of FMLA usage (potential future requirement).

E-mail Notifications

SCENARIO ONE: Employee does not have a valid FMLA action code but has FMLA qualifying conditions on timesheet

- Three or more sick days
- Workman's Comp time

E-mail Address: HR@cabarruscounty.us

E-mail Subject Line: FMLA Action May be Requred (EmployeeNum - EmployeeLastName, EmployeeFirstName)

E-mail body: FirstName LastName of department NNNN has an FMLA action on timesheet for pay period ending mm/dd/yyyyy.

SCENARIO TWO: Employee has valid FMLA action code AND Employee has FMLA qualifying time but has not checked the FMLA box on that day for any of the following

- Sick time
- Workman's Comp time
- Leave without pay (LWOP)
- Vacation time on a day where either previous day or following day has FMLA box checked
- Holiday time on a day where either previous day or following day has FMLA box checked
- Comp time

E-mail Address: HR@cabarruscounty.us

E-mail Subject Line: FMLA Potential Time (EmployeeNum - EmployeeLastName, EmployeeFirstName)

E-mail body: FirstName LastName of department NNNN has potentially qualified FMLA time on timesheet for pay period ending mm/dd/yyyyy but has not checked the FMLA box.

SCENARIO THREE: Employee has valid FMLA action code AND Employee has checked the FMLA box on for any of the following:

- Sick time
- Workman's Comp time
- Leave without pay (LWOP)
- Vacation time on a day where either previous day or following day has FMLA box checked
- Holiday time on a day where either previous day or following day has FMLA box checked
- Comp time

E-mail Address: HR@cabarruscounty.us

E-mail Subject Line: FMLA Time Entry (EmployeeNum - EmployeeLastName, EmployeeFirstName)

E-mail body: FirstName LastName of department NNNN has qualified FMLA time on timesheet for pay period ending mm/dd/yyyyy. Please review the timesheet.

Modify Timesheet Report (Departmental Report)

A custom payroll /timesheet report called *Cabarrus County Departmental Timesheet Review* will be modified to incorporate FMLA usage. In the same manner LWP and COMP hours are shown now, the FMLA hours will be reported in future.

Report Name:	Departmental Timesheet Review	Sort Order:	
Frequency:	On demand	Grouping:	
Data Source:		New/Existing	Existing Report, modification

9/17/2013 Cabarrus County Departmental Timesheet Review

TimesheetCheckDepartments Pay Period: 8/23/2013 - 9/5/2013

EMPLOYEES WITH LWP - WORKMAN'S COMP - MISC HOURS.

			Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th
HOWARD PHYLICHIA	7891															
		WC														
		LWP								8.00			8.00	8.00	8.00	8.00
		Misc														
VAN HORN VIOLET	5658															
		WC														
		LWP												2.84	8.00	8.00
		Misc														

EMPLOYEES WITH OPEN TIMESHEETS OR NO TIMESHEET CREATED.

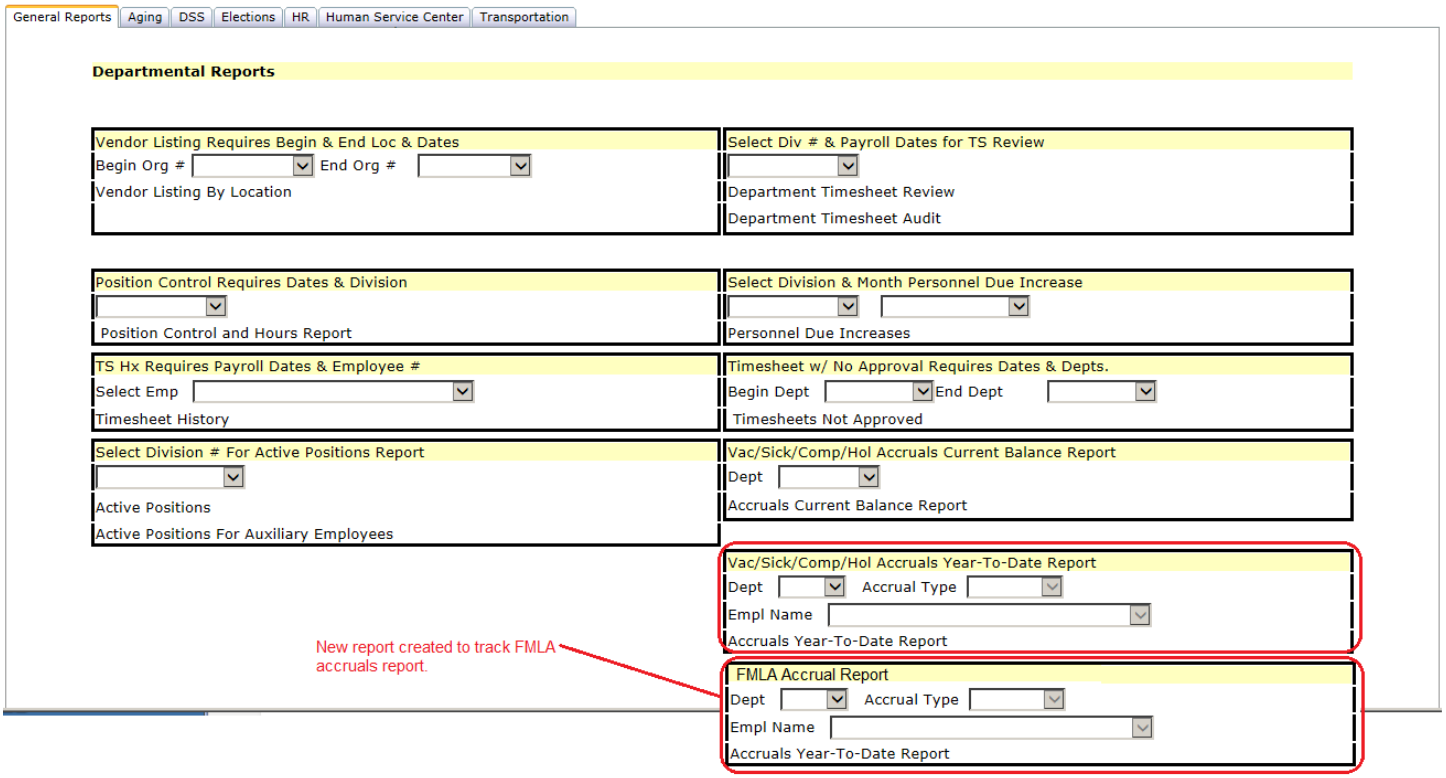
DE JESUS JOSEPH	7072	No Timesheet Created
FLEMING ARKEEM	6873	No Timesheet Created
HARKNESS SANDRA	8057	No Timesheet Created
KENNEDY JOHN	5663	No Timesheet Created
LUNA SHANTAL	8061	No Timesheet Created
MAUNEY CYNTHIA	6540	No Timesheet Created
MINTON SHASTA	6795	No Timesheet Created
NEEDELMAN JENNIFER	6011	No Timesheet Created
PEREZ JONAS	5978	No Timesheet Created
PREWITT BETTY	5361	No Timesheet Created
SCOTT ANTHEA	6056	No Timesheet Created

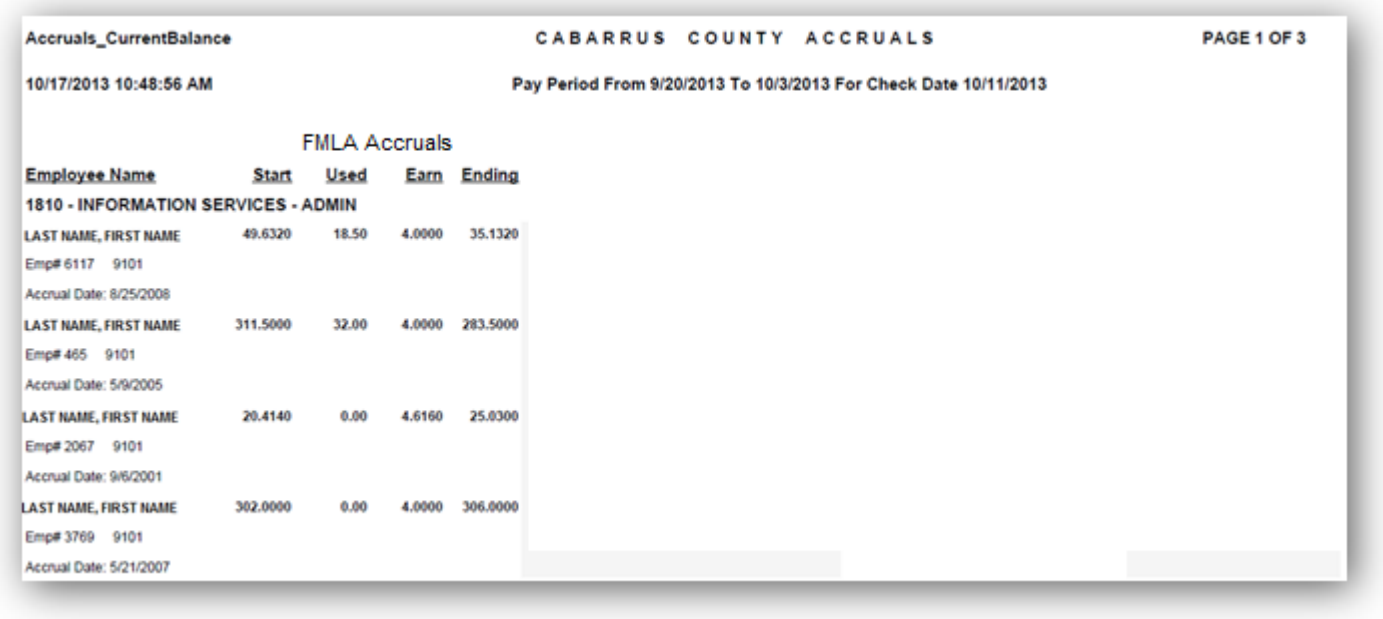
Create a new report section which looks almost identical to this existing reporting. Call it EMPLOYEES WITH FMLA. Show only the hours from Sick, Vacation, Comp, LWOP from any line where FMLA is checked. Also include any qualifying Holiday time...i.e. Holidays preceded and followed by FMLA usage are also considered FMLA. Any line on which both Holiday hours are entered and the FMLA box is checked is considered FMLA usage.

Making the FMLA a separate section instead of just adding a line in the existing report will cause the FMLA to stand out more and alert HR to its usage by an employee. If an employee is not due FMLA, it can be corrected quickly. If an employee is due FMLA and failed to check the FMLA box, it can also be quickly corrected.

Modify Department Reports (Departmental Report)

The Departmental Reports should be modified to reflect the addition of FMLA to the accruals. The accrual type code will be FMLA. The existing reports cannot be modified as there is no space remaining to add the new data. Instead, a new report will be created for tracking FMLA accruals.





Accruals_CurrentBalance CABARRUS COUNTY ACCRUALS PAGE 1 OF 3

10/17/2013 10:48:56 AM Pay Period From 9/20/2013 To 10/3/2013 For Check Date 10/11/2013

FMLA Accruals

Employee Name	Start	Used	Earn	Ending
1810 - INFORMATION SERVICES - ADMIN				
LAST NAME, FIRST NAME	49.6320	18.50	4.0000	35.1320
Emp# 6117 9101				
Accrual Date: 8/25/2008				
LAST NAME, FIRST NAME	311.5000	32.00	4.0000	283.5000
Emp# 465 9101				
Accrual Date: 5/9/2005				
LAST NAME, FIRST NAME	20.4140	0.00	4.6160	25.0300
Emp# 2067 9101				
Accrual Date: 9/6/2001				
LAST NAME, FIRST NAME	302.0000	0.00	4.0000	306.0000
Emp# 3769 9101				
Accrual Date: 5/21/2007				

PROJECT CHANGES

Use this section to document changes made after initial approval of the project.

DATE	
SPONSOR	
STATUS	
IMPACT	
TITLE/SUMMARY	
DESCRIPTION	

DATE	
SPONSOR	
STATUS	
IMPACT	
TITLE/SUMMARY	
DESCRIPTION	

DATE	
SPONSOR	
STATUS	
IMPACT	
TITLE/SUMMARY	
DESCRIPTION	

DATE	
SPONSOR	
STATUS	
IMPACT	
TITLE/SUMMARY	
DESCRIPTION	

DATE	
SPONSOR	
STATUS	
IMPACT	
TITLE/SUMMARY	
DESCRIPTION	

PROJECT JOURNAL

Date	Action	Participants / Recipients	Description
03/13/2015	Email	FMLA team	Sent project plan to all team members for review and commentary
03/26/2014	Email	FMLA team	Sent project plan for **final** review