



Small Wins: Creating
Customer Value by
Developing an FMLA Module

# 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 ecotime 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 ecotime.
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
Supervisor manually confirms FML entitlements.	confirmation via ecotime FMLA Module.
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 ecotime 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

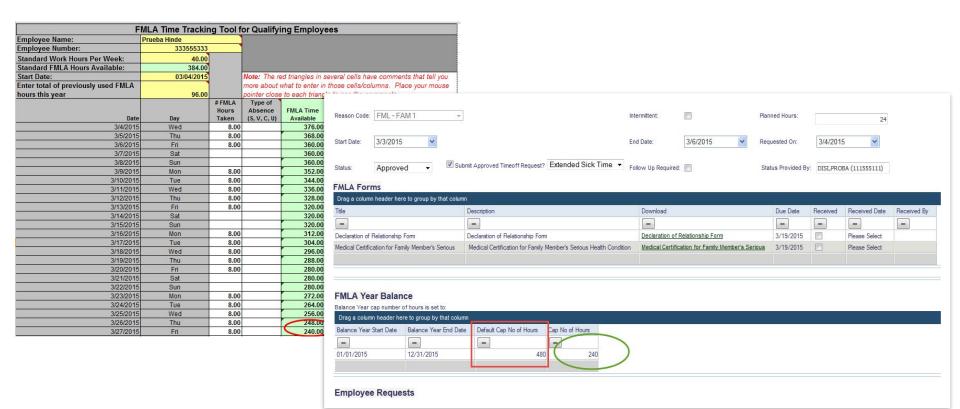


### **Customer Value (Even More Small Wins)**

- 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 Module System Demo**

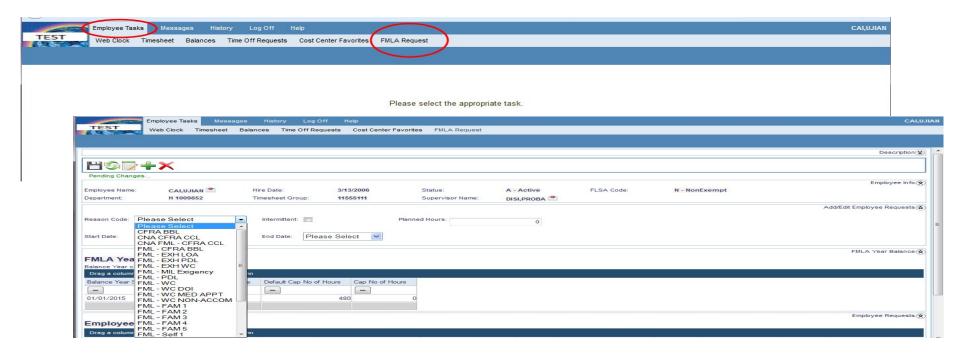








#### **FMLA Initiation**

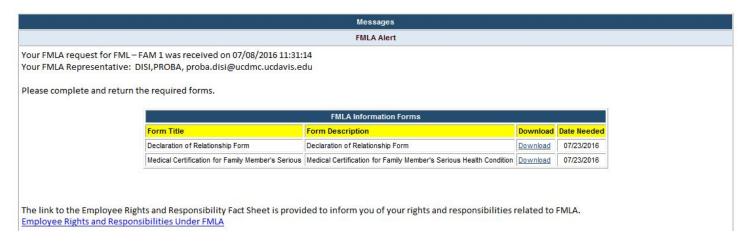


Employee self-service to submit FMLA Event.



#### **System Notifications**

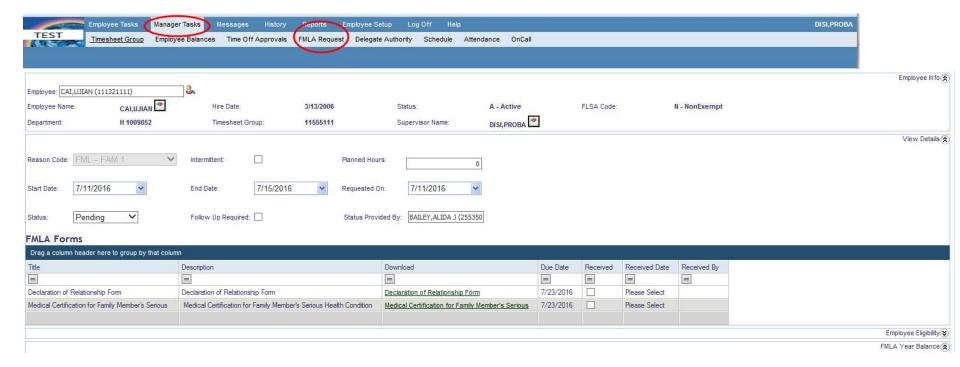
The system will send out email notifications and will display web messages for both the employee and supervisor.



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



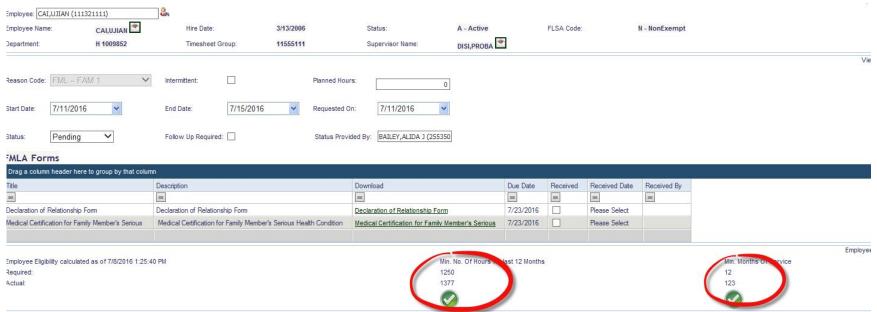
### **Manager Review of FMLA Request**





### **Eligibility**

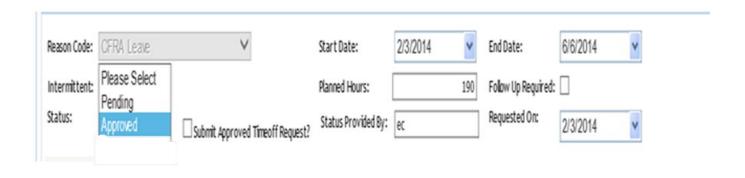
Supervisors can quickly and easily determine whether employee is FML eligible by reviewing this information in the system.





#### **Approve/Modify FML Request**

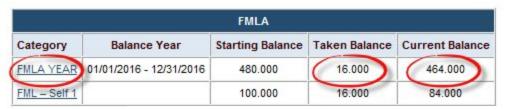
The supervisor can approve or modify a LOA/FML request.





#### **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
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**

