

# People First Portal Upgrade HR Training – Time and Attendance

(February 2018)



FLORIDA DEPARTMENT of

**management**  
**SERVICES**

We serve those who serve Florida



**People First**  
*the New Generation*

*Created with you in mind.*

# FMLA/FSWP Processes

- Requests that are older than 19-months and have never been approved will be deleted as part of the implementation
- FMLA/FSWP reasons have been updated to match current state and federal laws
  - FMLA Reasons
    - Birth or Adoption of a Child
    - Family Member with Serious Health Condition
    - Employee with Serious Health Condition
    - Military Caregiver (though not tracked in People First, discussed later)
    - Qualifying Exigency

# FMLA/FSWP Processes (Continued)

- FMLA/FSWP reasons (continued)
  - FSWP Reasons
    - Birth or Adoption of a Child
    - Family Member with Serious Health Condition
  - Combined FMLA/FSWP Reasons (creates two separate events, discussed later)
    - Birth or Adoption of a Child
    - Family Member with Serious Health Condition

# FMLA/FSWP Process (Continued)

- FMLA and FSWP requests are completely separated out for tracking balances; if a combined FMLA/FSWP request is created, two requests will be created, one for FMLA and one for FSWP
- FMLA and FSWP will each have a separate deduction period that starts on the first day of the first occurrence for that specific type (FMLA or FSWP) and continues for 12 months
  - If the initial request is created with an incorrect start date, the agency HR professional must call the service center to fix; the initial date drives the deduction period, which can be changed only by the service center
- Requests cannot cross deduction periods. If an employee has a request that starts prior to the end of one deduction period and ends after the 12-month deduction period, two separate requests must be created
- Requests are based on all appointment IDs for the employee, not just the ID the request is created under

# FMLA/FSWP Process (Continued)

- Multiple requests can be created for the same deduction period but will restrict the hours per deduction period, not event.
  - For example (example assumes standard schedule), if the deduction period is January 15, 2017, through January 14, 2018, the employee has two FMLA events during the period. The first runs from January 15, 2017 – April 30, 2017, where the employee uses 400 hours of FMLA. The second runs from September 2, 2017 – September 30, 2017. The employee will be limited to 80 hours for this event
- When making a request during an existing FMLA/FSWP period, the remaining balance presented is as of the moment the request is created. However, note that if multiple requests are running concurrently, the system will still limit the true available balance based on the deduction period (will prevent from going over the max)
- Military Caregiver is not tracked in People First; these types of requests must be tracked manually by the agency

# FMLA/FSWP Process (Continued)

- FMLA and FSWP hours for the deduction period are calculated at the time the initial request is made based on the employee work schedule at that time
  - FMLA
    - C6 – 192-Hour FLSA period – 576 hours
    - C7 – 168-Hour FLSA period – 504 hours
    - All other FLSA periods are 480 hours
  - FSWP
    - C6 – 192-Hour FLSA period – 1,248 hours
    - C7 – 168-Hour FLSA period – 1,092 hours
    - All other FLSA periods are 1,040 hours

# FMLA/FSWP Process (Continued)

- FMLA and FSWP Approvals
  - Approvals are sent to HR security role codes of A, H, and X within the agency and NOT to the manager
  - Managers can create the FMLA or FSWP request on behalf of the employee; once saved, it is submitted to HR for approval
  - All A, H, and X security role code users within the agency will receive notification when an FMLA or FSWP request is submitted
  - Once the responsible A, H, or X security role code user claims the request, the Inbox task is removed from all other A, H, and X security role code users Inboxes
  - If the request is submitted on behalf of the employee by an A, H, or X user, the request goes into an approved status



# FMLA/FSWP Process (Continued)

- When the employee has an approved FMLA or FSWP request (or both), the employee has a dropdown on the timesheet for the request period that allows recording leave to the correct type (FMLA and/or FSWP)
  - Dropdown on the timesheet is available ONLY for the dates of the active request, not the entire deduction period
    - For example, if the deduction period is January 15, 2017, through January 14, 2018, and the employee has two FMLA events during the period, the first event runs from January 15, 2017 – April 30, 2017, and the second event runs from September 2, 2017 – September 30, 2017. The FMLA dropdown will be available only for selection between January 15 – April 30 (first event) and September 2 – 30 (second event)



# FMLA/FSWP Process (Continued)

- Only the following leave types can be used on the timesheet with an FMLA or FSWP request:
  - 0040 – Annual Discretionary Admin Leave
  - 0051 – Annual Leave
  - 0052 – Sick Leave
  - 0053 – Family Sick Leave
  - 0054 – Regular Comp
  - 0055 – Special Comp – Pre July 2012
  - 0058 – Authorized LWOP
  - 0059 – Unauthorized LWOP
  - 0060 – Workers Comp LWOP
  - 0065 – Workers Comp Admin
  - 0066 – Personal Holiday
  - 0075 – Veterans Disability
  - 0076 – Personal Leave (FSDB ONLY)
  - 0085 – FLSA Comp
  - 009\* - Special Comp Leave Types

# FMLA/FSWP Transition

- Open FMLA, FSWP, and FMLA/FSWP for which the deduction period ends on or after March 26, 2018, will be carried forward
  - As long as the available balance is greater than zero for the specific type (FMLA, FSWP, or FMLA/FSWP), the employee will be able to request another FMLA or FSWP event during the deduction period
  - All requests during the remainder of the deduction period will be evaluated against the remaining balance for the requested leave type

# FMLA/FSWP Transition (Continued)

- If the employee has only one request type (FMLA or FSWP) that is carried forward and the employee requests use of the other type (FMLA or FSWP), a separate deduction period will be created for that type (deduction period for the original type is not impacted)
- For employees who have only a combined FMLA/FSWP request type, the deduction period is carried forward for both FMLA and FSWP
- Some employees have multiple active deduction periods because of how the combined FMLA/FSWP request currently works in People First
  - All deduction periods will be carried forward and future requests during the applicable deduction periods will be evaluated based on the respective leave type

# Flexible Work Schedule

- Changes to the flexible work schedule process includes the following:
  - Monthly excluded employees can establish their flexible work schedule based on a 14-day period instead of a 7-day period
  - Emails are sent to the manager when a new request is submitted for approval
  - Emails are sent to the employee when a request is either rejected or approved
  - Email is sent to the employee 14-days before the employees flexible work schedule expires

# Leave Adjustments

- A new Update Balances button is available that allows HR professionals to force the leave adjustment to update employees balance when the adjustment is saved instead of waiting for nightly time evaluation to run
- For leave types with a balance, balances will be displayed in the overview. The balance displayed will be the net hours available
- Personal Holiday is now available for processing adjustment; agencies no longer have to call the service center
- Additional edits are being added to ensure adjustments cannot be processed with an effective date prior to employee's agency hire date or after employee's last day worked

# Leave Adjustments (Continued)

- Following leave types are no longer available as adjustment types:
  - 0092 Leave – SC Holiday
  - 0093 Leave – SC Holiday CO
    - If adjustments are needed to 0093 – Leave – SC Holiday CO after March 16, 2018, the request must be submitted through the **service center**
  - 0095 Leave – SC Closures CO
    - Adjustments to 0092 Leave – SC Holiday and 0095 Leave – SC Closures CO are NOT valid after March 16, 2018, and should NOT be submitted for processing

# Leave Adjustments (Continued)

- Leave type 0096 Leave – SC Holiday CO is available for processing a leave adjustment (can't be used with an effective date prior to May 1, 2018)
  - Holiday special comp being carried over for the period ending April 30, 2018, must be placed in this bucket as 0093 is no longer available
- All leave adjustments are now displayed under a new Adjustments History screen
- Future-dated leave adjustments are displayed in the Adjustments History screen and can be deleted prior to the effective date of the adjustment
- Leave type 0091 – SC Holiday will allow retro negative adjustments further back than just the current pay period



# Leave Transfer

- Leave transfer will be available for use on the first day at the new agency
- Personal Holiday is available for transfer

# Leave Balance Overview

- Military training will be displayed for employees who have used military training during the current military fiscal year (will NOT be displayed to all employees, only to those who are actively using)
- Leave type 0096 Leave – SC Holiday CO is included under the column for Special Comp – Holiday CO
- Personal Holiday is shown with the text of “Available” if it has not been used and “Pending” if the time has been committed on the timesheet but not yet approved

# Leave Balance Overview (Continued)

- Ability to select pending leave hours to see what days and how many hours per day the employee is using leave

Current Balances				
	Date	Annual Leave	Sick Leave	Personal Holiday
Total Hours Available	01/18/2018	607.000	2432.810	0.000
Pending Timesheet Hours	01/18/2018	8.000	0.000	0.000
		=====	=====	=====
Net Hours Available	01/18/2018	599.000	2432.810	0.000

Pending Leave		
Hours Type	Date	Hours
LEAVE-ANNUAL	12/01/2017	8.00

# Leave Payouts

- Remaining balances for previously paid out leave is zeroed out when a PAR is completed when the employee is rehired after a break in service greater than 60 days instead of waiting for the appointment effective date
- Zero out balance option is available when creating a separation leave payout
- Payout entries will no longer consider any previous paid-out hours; agencies must validate the hours previously paid out using the FLAIR PYRL Annual Leave Payment History screen and determine the hours eligible for payout; all rules in the Leave Payout screen will be based on employee's pay plan (e.g., 240-hour maximum payout of annual leave for a Career Service employee)
- Previously paid-out buckets are no longer presented on the screen

# Leave Payout (Continued)

- Special compensatory leave types 0091 Leave – SC Holiday, 0094 Leave – SC Closures and 0096 Leave – SC Holiday CO are available for payout in the Leave Payout screen; agencies are responsible for ensuring payouts occur only when supported by the collective bargaining unit for the employee
- FLSA compensatory caps are not applied, allowing payouts up to the greater of employee's current balance and 999.75 hours (this applies to the payout only; accruals do not change); if balance is greater than 999.75, payments must continue to be split as the maximum hours per payment is 999.75 hours
- July 1, 2012, hourly rate of pay warning message is not shown for special compensatory leave payouts


# Leave and Overtime Request



- An approved leave request (not an overtime request) will be defaulted on the timesheet when initially accessing the period, but it must be saved by the employee to be retained on the timesheet
- Ability to cancel an approved request (e.g., plans changed)
- Additional fields are displayed based on the request submission, approval, rejection, and cancellation status. These fields are dynamically presented based on the status of the request
  - Fields are presented only for requests processed in the new portal; requests processed prior to March 16, 2018, will not have these fields

Submitted	STEPHEN E EATON	01/12/2018
Approved	JIMMY J COX	01/18/2018
Cancelled	JIMMY J COX	01/18/2018

# Leave and Overtime Request (Continued)

- Employee's current leave balance (net available balance) is available before entering the leave request

 Leave and Overtime Request  
ALISSA M MARTZ [REDACTED] PAYROLL TEAM LEAD

Current Leave Balances  New 

Request Type	Requested Hours	Request Status	Start Date	End Date
LEAVE-ANNUAL	32.00	Submitted	02/16/2018	02/21/2018



# Requests Pending Approval

- The Leave, Overtime, and Other Approvals screen is now titled Requests Pending Approval
- Emails are sent to the manager when a new leave or overtime request is submitted for approval
- Emails are sent to the employee when a request is either rejected or approved, or is cancelled by another person
- FMLA and FSWP requests are sent to HR professionals with security role codes of A, H, and X within the agency and NOT to the manager

# Special Compensatory Leave

- Leave types 0092 Leave – SC Holiday and 0093 Leave – SC Holiday CO are not available for use beginning May 1, 2018
- For leave type 0091 Leave – SC Holiday, beginning May 1, 2018, all holiday special compensatory leave will be accrued under leave type 0091 Leave – SC Holiday
- For leave type 0091 Leave – SC Holiday, starting with the accrual period of May 1, 2018 to Oct. 31, 2018, leave type 0091 Leave – SC Holiday is restricted by 6-month period (May 1 to Oct. 31 and Nov. to April 30), but does not have a limited grace period; this allows employees to use the leave during the 6-month accrual period, even if completing the timesheet after the period has ended
- Effective May 1, 2018, leave type 0096 Leave – SC Holiday CO is used for special compensatory leave holiday carry-over (cannot be used with an effective date before May 1, 2018)

# Special Compensatory Leave (Continued)

- Leave type 0096 Leave – SC Holiday CO is restricted by 180-day period starting May 1 and Nov. 1 each year, if the effective date of the adjustment is not May 1 or Nov. 1, the 180-day period still starts from May 1 or Nov. 1, depending on the period the adjustment is performed in; while use is limited to the 180-day period, the leave is available if completing the timesheet after the period has ended
- Effective March 26, 2018, leave type 0095 Leave – SC Closures CO is not available for use
- CBU allowances that allow using sick leave or collective bargaining administrative leave to accrue special compensatory leave (has already been removed from the union agreements) are not available
- Special compensatory leave forced use logic order for career service employees is (does not apply to CBUs 6, 10, or 12): Priority 1 – leave type 0096 Leave – SC Holiday CO; Priority 2 – leave type 0091 Leave – SC Holiday; Priority 3 – leave type 0094 Leave – SC Closures; Priority 4 – leave type 0055 Leave – SC Pre July 2012

# Timesheet Approval

- Screen is not separated out by timesheet period; rather, all approvals are presented together and sorted by FLSA period for employees who have an included employee group and for employees on an extended work schedule employees (pay period for excluded employees), then sorted by last name
- Screen is split into two sections; the first section, “Ready to Approve,” shows all timesheets requiring approval and the second section, “Pending Employee Submission,” includes all timesheets that are still pending employee action
- “Return for Correction” process is available in place of the rejection process
- Once approved, timesheets are removed from the Timesheet Approval screen; screen shows ONLY timesheets that require either manager or employee action (does not show approved timesheets)

# Timesheet

- Information Icon – Presented as a separate menu and includes links to Timesheet Questions, Payroll Information, and When Do I Get Paid?
- Calendar View – Allows employees to select a calendar to navigate to a specific timesheet period (calendar is view-only); calendar is presented Friday through Thursday to match the state standard work week
- Leave Request Icon – Allows the employee to navigate directly to the Leave & Overtime Request screen to view past requests as well as create new requests
- Leave Balance Overview Icon – Allows the employee to navigate directly to the Leave Balance Overview screen to view leave balances
- Weekly View – Available for 40-hour included employees; allows employees to change their timesheet view from a pay period view to a weekly view
- Work Period – Presented as a left/right navigation allowing employees to move forward and backward between timesheet periods
- Charge Object – Presented as the Charge Object, not as separate fields (one field instead of three)

# Timesheet (Continued)

- Hours Type
  - When the menu option is selected, most common hours types are presented first (general list, not employee-specific); all hours types are presented in a second section of the menu in alphabetical order
  - New hours types available:
    - 0040 – Annual Discretionary Admin Leave
    - 0070 – LWOP-Military Training
    - 0071 – LWOP Enlisted
    - 0072 – LWOP-Non FL State Activation
    - 0096 – Leave SC Holiday CO
- Type 1016/1017 will now require the employee to work more than the ***scheduled hours in a day*** and scheduled hours in the period

# Timesheet (Continued)

- Updates to allow additional hours types to be used when employee is on military leave without pay (with supplement -- 82 and without supplement -- 83). The following Hours Types will be allowed when on military leave:
  - 0040 – Annual Discretionary Admin Leave
  - 0045 – Office Closure Admin Leave
  - 0051 – Annual Leave
  - 0054 – Regular Comp
  - 0055 – Special Comp Pre July 2012
  - 0066 – Personal Holiday
  - 0082 or 0083 – Military Leave
  - 0085 – FLSA Comp
  - 0091 – Special Comp Holiday
  - 0093/0096 – Special Comp Holiday Carry-Over
  - 0094 – Special Comp Office Closure



# Timesheet (Continued)

- Several “soft” edits that exist in the current system will become “hard” stops in the upgrade:
  - The edit for 0035 – Admin – Voting will now restrict the use to no more than one hour per workday
  - The edit for 0044 – Admin – Mentor/Volunteer will now restrict the use to no more than 4 hours per workday and 5 hours per calendar month
  - The edit for 0080 – Admin – Child’s Activities will now restrict the use to no more than one hour per calendar month
  - The edit for 0075 – Admin – Veterans Disability will now restrict the use to no more than 48 hours per calendar year

# Timesheet (Continued)

- FMLA/FSWP – When the employee has an approved FMLA, FSWP, or FMLA/FSWP request, a dropdown is presented allowing the employee to select which type of leave the hours should be counted toward
- Current Leave Balances Icon
  - Allows employees to view their current available (net) leave balances without navigating away from the timesheet (presents in an overlay on the timesheet)
  - Balances presented are as of the moment the employee selects the icon
  - Includes an expiration date for leave types (e.g., special holiday compensatory leave, personal holiday) that expire; expiration date is the last timesheet day the leave can be used

# Timesheet (Continued)

- Separate timesheet template screen is not available
- Save Template button allows employees to save their current timesheet rows as their template
- After a template is saved, employee will have option to apply template or update template
- Only charge objects and hours type are saved in the timesheet template
- Template will allow up to 50 rows to be saved
- Timesheet templates created prior to the portal upgrade will be wiped out and employees will have to create a new template post-upgrade

# Timesheet (Continued)

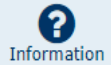
- Delete Icon (trash can) – Allows employees to delete a timesheet row that has not been approved
- Add Row Icon – Allows employees to add an additional row to their timesheet
- Defaulted Rows – Five rows are defaulted on the timesheet
- Comments Icon – Allows employees to add comments and review saved comments for the time period; icon changes to blue when a comment is added
- Audit Trail – Audit trail stores the last action per timesheet status (submitted, approved, returned for correction, and unapproved) instead of storing only the last action; information is available when hovering over the entry in the timesheet

# Timesheet (Continued)

Employee / Time and Attendance / Timesheet



Timesheet



**Reports**

[Timesheet Summary](#)  
[Leave Audit Report](#)



View Calendar



Leave Request



Leave Balance

Save

Submit

Cancel

Work Period < December 1 - 14, 2017 >

Current Leave Balances

Apply Template Update Template

Charge Object	Hours Type	FMLA/ FSWP	12/1 Fri	12/2 Sat	12/3 Sun	12/4 Mon	12/5 Tue	12/6 Wed	12/7 Thu	12/8 Fri	12/9 Sat	12/10 Sun	12/11 Mon	12/12 Tue	12/13 Wed	12/14 Thu	Total Hours
Select or ent...	1000 - WORK-RE...		8.00			8.00	8.00	8.00	8.00	8.00			8.00	8.00	8.00	8.00	80.00
Select or ent...	Select or ent...																0.00
Select or ent...	Select or ent...																0.00
Select or ent...	Select or ent...																0.00
Select or ent...	Select or ent...																0.00
<b>Totals</b>			8.00	0.00	0.00	8.00	8.00	8.00	8.00	8.00	0.00	0.00	8.00	8.00	8.00	8.00	80.00
Add Row	Comments	Schedule	8.00	0.00	0.00	8.00	8.00	8.00	8.00	8.00	0.00	0.00	8.00	8.00	8.00	8.00	80.00

Grand Total Hours: 80.00

# Time and Attendance Reports

- Leave Audit Report, Leave Balance Report, Leave Liability Reports, Leave Summary Report, Special Comp Leave Audit Report, Timesheet Audit Report, Timesheet Summary Report, and Time Information Report will all be updated for the special compensatory changes described earlier
- Missing Timesheet Report will be updated to run near real-time; the report will continue to be updated each weekend to identify new time period; however, as timesheets are approved throughout the week, the approved records will be removed from the report
- FMLA/FSWP Report
  - Updates will be made based on the reason code updates
  - InterDept ID, Requestor Comments, and Approver Comments are removed
  - Leave Type and Starting Balance are included

# Charge Objects

## Covered in Payroll Training

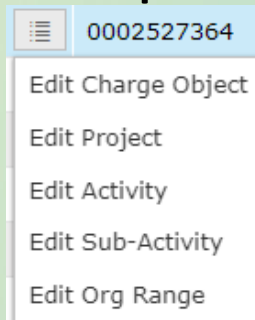
- To simplify the process, charge object creation, maintenance, org range assignment, inactivation, etc., are all performed within a single screen
- Charge Object Text is a new field and is available as the default presentation to employees on the timesheet screens. The Charge Object Text presented to the employees on the timesheet for pre-upgrade charge objects is a concatenation of Project, Activity, and Sub-Activity
- Charge Object Text is available to be created for old and new charge objects and should be created using plain language (e.g., Project A), not codes (should be easy for employees to understand)
- Ability to assign a charge object to a position is no longer available



# Charge Objects (Continued)

## Covered in Payroll Training

- Buttons within the screen are presented in the order they should be completed (e.g., New Project, New Activity); steps that are not applicable can be skipped
- To edit an existing charge object, select the menu beside the charge object and select the action to be completed from the menu



# Charge Objects (Continued)

## Covered in Payroll Training

Manager / Charge Objects



Charge Objects

Agency7000 - Department of Corrections

Resize Columns to Fit

New Project +

New Activity +

New Sub-Activity +

New Charge Object +

Assign Org Range +

Charge Object	Charge Object Text	Effective Date	End Date	Project	Project Text	Activity	Activity Text
0003937965	Test AA B CC	12/18/2017	12/31/9999	Test AA	TEST AA	Test B	TEST B
0003904991		08/25/2017	12/31/9999	Hurricane Irma	HURRICANE IRMA		
0003901224		08/14/2017	12/31/9999	August 19, 2017 ...	OPERATIONS EVEN...		
0003898374		08/14/2017	12/31/9999	August 19, 2017 ...	OPERATIONS EVEN...	08	OPERATIONS EVEN
0003898373		07/31/2017	12/31/9999	Tropical Storm E...	TROPICAL STORM E...	07	TROPICAL STORM
0003797958		10/04/2016	12/31/9999	Weather Emerge...	HURRICANE MATTH...	06	HURRICANE MATTI
0003784086		08/31/2016	09/08/2016	Tropical Storm	TROPICAL STORM H...	05	TROPICAL STORM
0003778641		08/12/2016	12/31/9999	FCOR - OIT	FCOR - OIT	19	FCOR - OIT
0003674712		08/28/2015	12/31/9999	Weather Emerge...	TROPICAL STORM/...	04	TROPICAL STORM/
0003726163		07/01/2015	12/31/9999	GRANT-08 PREA ...	GRANT-08 PREA PH...	18	GRANT-08 PREA PI
0003726162		07/01/2015	12/31/9999	GRANT-RE I-CORE	GRANT-RE I-CORE	17	GRANT-RE I-CORE
0003726161		07/01/2015	12/31/9999	GRANT-SM PINE...	GRANT-SM PINELLA...	16	GRANT-SM PINELL

# Charge Objects (Continued)

## Covered in Payroll Training


- To create a new charge object:
  - Step 1: Create the project if the project does not already exist, (if it does, skip to step 2) by selecting New Project and entering the project details


### New Project



\*Agency

\*Project

\*Project Text

\*Effective Date  

\*End Date  

# Charge Objects (Continued)

## Covered in Payroll Training

- Step 2: Create the activity, if the activity does not already exist (otherwise skip to step 3). Select New Activity; enter the activity details; and select Save

### New Activity

\*Agency

\*Activity

\*Activity Text

# Charge Objects (Continued)

## Covered in Payroll Training

- Step 3: Create the sub activity, if the sub-activity does not already exist (otherwise skip to step 4). Select New Sub Activity; enter the sub-activity details; and select Save

### New Sub Activity

\*Agency

\*Sub Activity

\*Sub Activity Text

# Charge Objects (Continued)

## Covered in Payroll Training

- Step 4: Create the charge object. Select New Charge Object. Select the Project, Activity, Sub Activity; update the Effective Date and End Date if needed; enter the Charge Object Text; and select Save

### New Charge Object

* Agency	7200 - Dept of Management Services		
* Project	<input type="text"/>	<input type="button" value="New Project"/>	<input type="button" value="+"/>
* Activity	<input type="text"/>	<input type="button" value="New Activity"/>	<input type="button" value="+"/>
* Sub-Activity	<input type="text"/>	<input type="button" value="New Sub-Activity"/>	<input type="button" value="+"/>
* Effective Date	<input type="text" value="01/23/2018"/>	* End Date	<input type="text" value="12/31/9999"/>
* Charge Object Text	<input type="text"/>		


# Charge Objects (Continued)

## Covered in Payroll Training


- Step 5: Assign org range. Select Assign Org Range. Select the charge object; assign the org range-low and high values; update the Begin Date and End Date if needed; and select Save

### New Org Range

\*Agency

\*Charge Object  

\*Org Range-Low Value  \*Org Range-High Value

\*Begin Date   \*End Date  