



What is FMLA?

- **FMLA** stands for **Family Medical Leave Act**.
- Entitles eligible employees to take an **unpaid, job-protected leave of up to 12 weeks per calendar year**, for qualifying reasons. (Please note: **Maternity/Paternity Leave is paid FMLA leave for the first three weeks**).
- All benefits must be kept in force during leave.
- Employee is required to continue making employee benefit contributions as an active employee.
- The entity is responsible for collecting the employee benefit contributions.

Eligibility Requirements for Employees

- Have completed 12 months of service with the employer.
- Have worked 1250 hours of service in each of the 12 months preceding the leave.
- And are: Active full-time regular employees scheduled to work 40 hours per week; or part-time regular employees scheduled to work at least 30 hours per week.

Qualifying Reasons for FMLA

- Serious health condition that makes employee unable to perform the employee's job;
- Incapacity due to pregnancy, prenatal medical care or childbirth;
- Care for the employee's child after birth, or placement for adoption or foster care;
- Care for the employee's spouse, dependent son, dependent daughter or dependent parent who has a serious health condition;
- Military Leave or Care of a dependent Service Member

Coordination of Sick, Vacation/Personal Days during FMLA leave

- FMLA leave should be selected as "unpaid" in Paylocity, with the exception of the three-week maternity bonus;
- Any employee leave benefits available to the employee (sick, vacation, personal days) must be applied during FMLA leave.
- Apply first 10 days of leave as sick days (if available); subsequent days as vacation (personal days for instructional) until exhausted or leave ends; remainder as sick days

Short-Term Disability (Voluntary, Employee-Paid benefit)

- All full-time employees are offered **Voluntary Short-Term Disability Insurance**
- Pays you a portion of your earnings if you cannot work because of a disabling illness or injury
- The **Benefits** are
 - Benefit equal to 66.67% of your base weekly pay; \$600 max per week
 - Up to 13 weeks
 - Limit of 4 weeks benefits for pre-existing condition
 - Payments start on **first day** of an **injury** or the **8th day** of an **illness**
 - Payments are offset by paid sick days

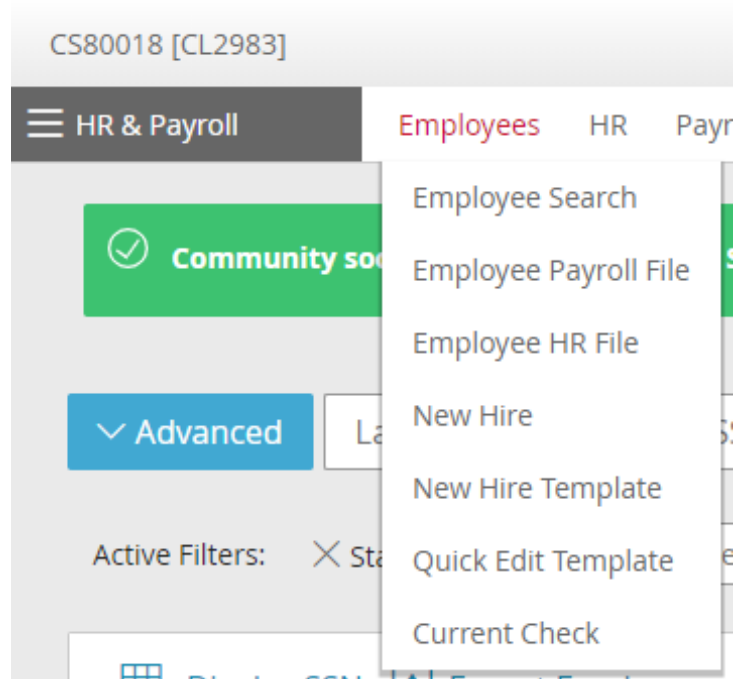
ADOM Benefits Office will contact bookkeepers and request Time-Off balance of employee. The Hartford takes care of the Short-Term Disability and entity doesn't have to worry about it. No need to track in Paylocity.

How to Apply Employee's Available Balance Time-Off

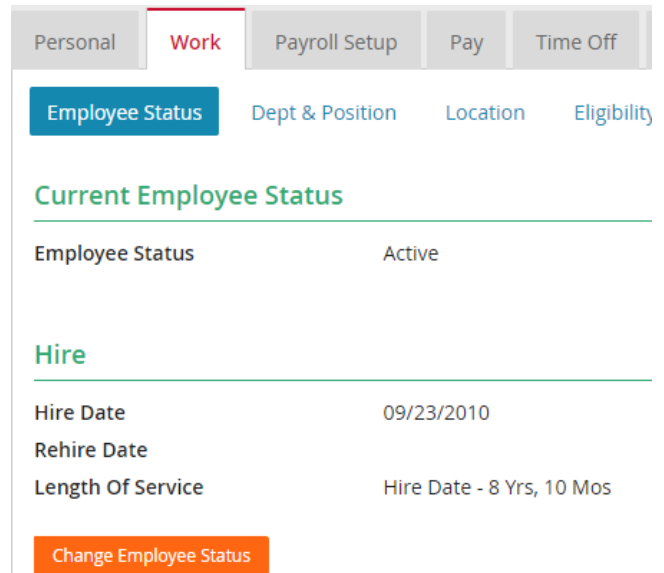
Maternity/Paternity Benefit (3 Weeks), if applicable → Available Sick Balance Up to 10 days → Available Vacation Balance → Remaining Sick Balance

Paylocity FMLA's Leave Tracking Tools

1. Log into Paylocity
2. Select **Employee**
3. Hover over **Employees**
4. Click on **Employee HR File**
(This will activate under The **Time Off** tab the **Leave Tracking** and **Time Off Documents**)



5. Click on **Work** Tab
(Employee Status should be highlighted.)
6. Click on **Change Employee Status**
The **Employee Update** screen shows up as seen on the next page.



< Employee Update

Employee Profile

SA
Sheppard
Allerdyce

Select Employee Action Form

Select Form

Details

- From the **Select Form** drop-down menu Chose **Status Change Leave of Absence**. The following form appears.

< Employee Update

Employee Profile

SA
Sheppard
Allerdyce

Employee Id
89

Employee Status
● Active

Hire Date
09/23/2010

Length of Service
8 Years, 10 Months

Select Employee Action Form

Select Form
Status Change Leave of Absence

Employee Status (required)

Change Reason

Note

Save
Cancel

- From the **Employee Status** drop down menu Select **Leave of Absence (LOA)**
- From the **Change Reason** drop down menu Select **Unpaid FMLA**
- Click on **Effective Date** and Enter or Select date from calendar. **Begin Check Date** field will populate accordingly automatically.
- Click on **Save**

Select Employee Action Form

Select Form
Status Change Leave of Absence

Employee Status (required)
Leave of Absence

Effective Date (required)
07/13/2016

Change Reason
Unpaid FMLA

Begin Check Date (required)
08/02/2019

Note

Save
Cancel

NOTE:


For employees in FMLA **not including Maternity/Paternity**, select **Unpaid FMLA**.

IMPORTANT: When an employee is placed on LOA, the name will disappear from your active employees as well as from WebTime. So, if an employee would have sick and vacation time that could be applied, you'll have to be careful not to skip them when processing payroll. Also, there will be **no accrual of sick/vacation time**.

The following screen appears, and you can **Print** or **Edit**.

Employee Update Print

Employee Profile



Sheppard
Allerdyce

Employee Id
89

Employee Status
● Leave of Absence

Hire Date
09/23/2010

Length of Service
8 Years, 10 Months

[Edit](#)

Details

Change Reason
Unpaid FMLA

Effective Date
07/13/2016

Begin Check Date
08/02/2019

Note
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From

Employee Status
Active

To

Employee Status
Leave of Absence

Approval Flow [View Approval History](#)

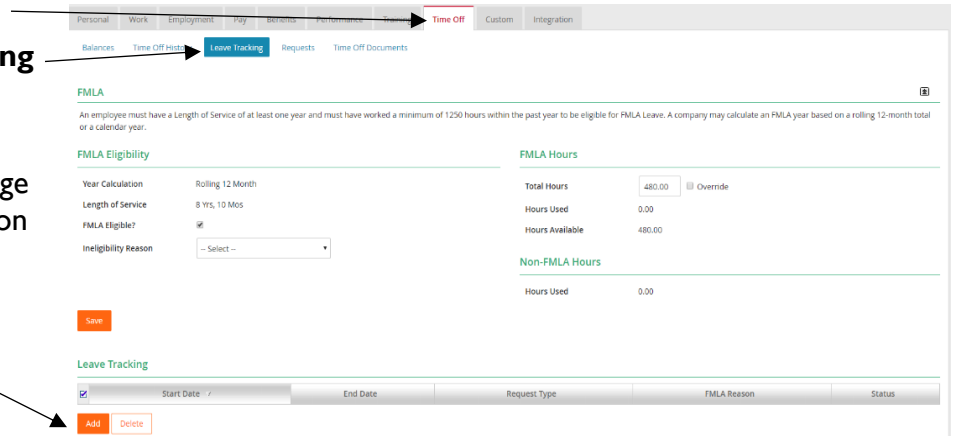
● Submitted by Emily Alba [16][CL2983] on 07/27/2019

12. Click on **Time Off** Tab

13. Click on **Leave Tracking**

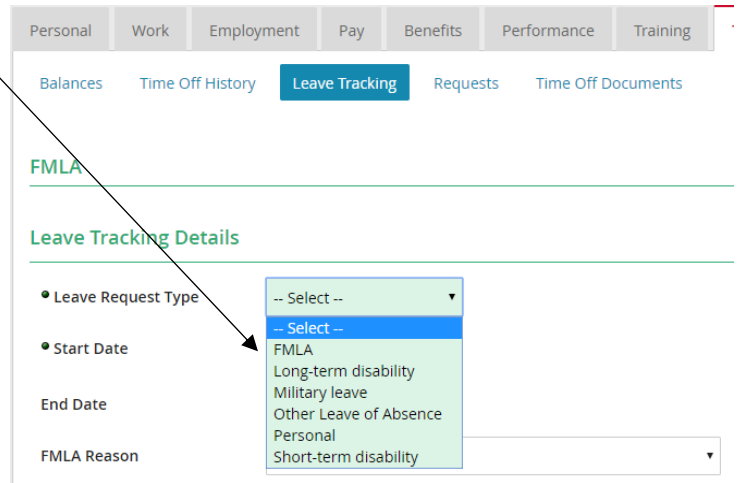
(Top part is informational.)

14. At the bottom of the page under Leave Tracking click on **Add**.



The screenshot shows the 'Time Off' tab selected in the top navigation bar. Underneath, the 'Leave Tracking' sub-tab is active. The page displays FMLA eligibility information, including 'Year Calculation' (Rolling 12 Month), 'Length of Service' (8 Yrs, 10 Mos), and 'FMLA Eligible?' (checked). It also shows 'FMLA Hours' with 'Total Hours' at 480.00 and 'Hours Available' at 480.00. At the bottom, there is a table for 'Leave Tracking' with columns for Start Date, End Date, Request Type, FMLA Reason, and Status. An 'Add' button is visible below the table.

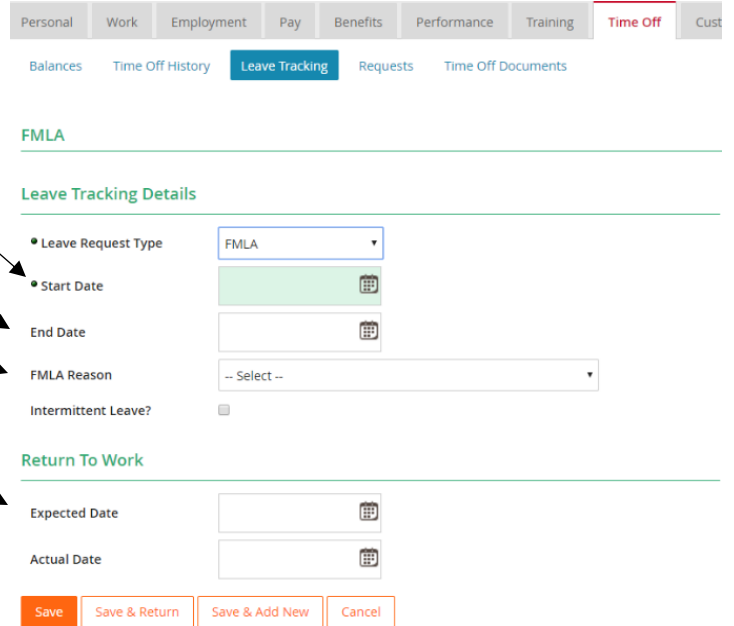
15. Select the **Leave Request Type**



The screenshot shows the 'Leave Tracking Details' form. The 'Leave Request Type' dropdown menu is open, showing options: -- Select --, FMLA, Long-term disability, Military leave, Other Leave of Absence, Personal, and Short-term disability. The 'FMLA' option is highlighted.

16. Complete **Leave Tracking Details**

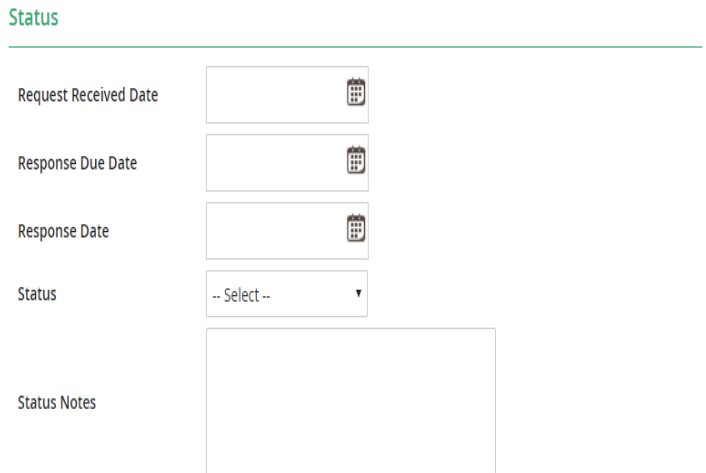
- a. Enter the **Start Date**
Date leave starts
- b. Enter the **End Date**
Date leave ends
- c. Select the **FMLA Reason**
- d. Enter **Expected Date**
Working day after End Date



The screenshot shows the 'Leave Tracking' section of the Paylocity interface. It includes a navigation bar with tabs for Personal, Work, Employment, Pay, Benefits, Performance, Training, Time Off, and Cust. Below this are sub-tabs for Balances, Time Off History, Leave Tracking (active), Requests, and Time Off Documents. The 'FMLA' section is expanded to show 'Leave Tracking Details'. Fields include: Leave Request Type (dropdown set to FMLA), Start Date (calendar icon), End Date (calendar icon), FMLA Reason (dropdown set to -- Select --), and Intermittent Leave? (checkbox). Below this is the 'Return To Work' section with Expected Date and Actual Date (calendar icons). At the bottom are buttons for Save, Save & Return, Save & Add New, and Cancel.

17. Complete the **Status** section

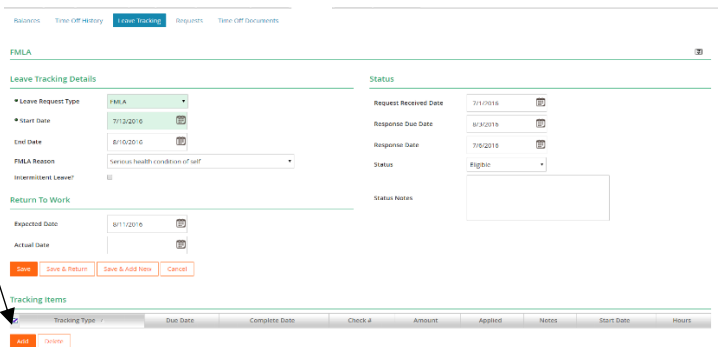
- a. Enter **Request Received Date**
Date the employee requested Leave.
- b. Enter **Response Due Date**
Date of deadline to provide the Harford requested Information, if applicable
- c. Enter **Response Date**
Date you received response From the Hartford.
- d. Select **Status** from drop-down Menu
- e. Type **Status Notes**, if any



The screenshot shows the 'Status' section of the Paylocity interface. It includes fields for Request Received Date, Response Due Date, and Response Date, each with a calendar icon. There is a Status dropdown menu set to -- Select -- and a large text area for Status Notes.

18. Click on Save

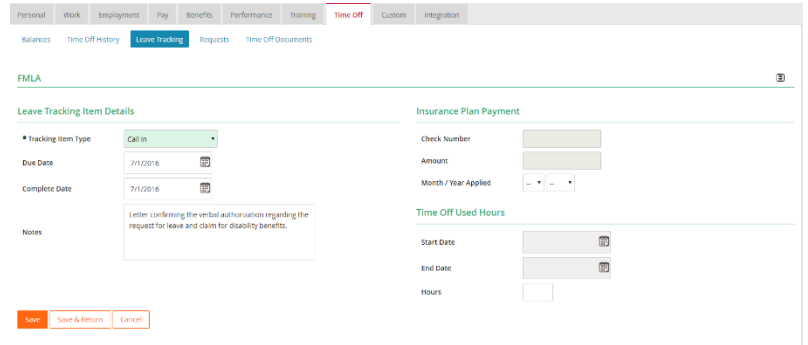
- 19. At the bottom of the Leave Tracking, if applicable, you can **add Tracking Items** pertaining to that leave.



The screenshot shows the 'Tracking Items' table at the bottom of the Paylocity interface. The table has columns for Tracking Type, Due Date, Complete Date, Check #, Amount, Applied, Notes, Start Date, and Hours. There is an 'Add' button and a 'Review' button below the table.

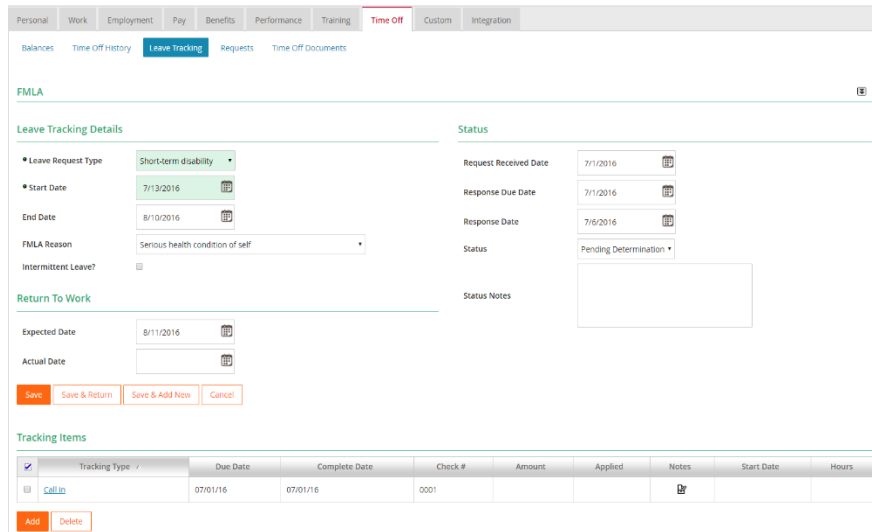
20. The screen on the right appears. Complete the **Leave Tracking Details**

- Select from drop-down menu the **Tracking Item Type**
- Enter **Due Date**, if applicable
- Enter **Complete Date**, if applicable
- Enter **Notes**
- Click **Save & Return**



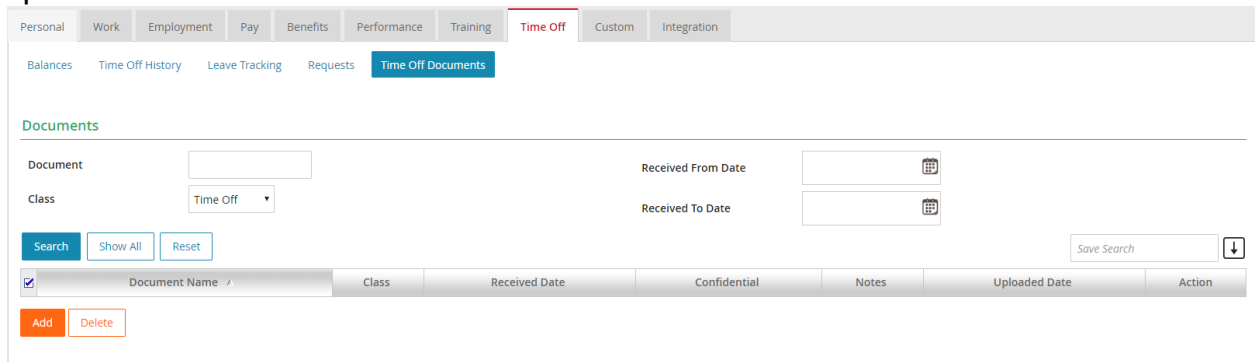
The screenshot shows the 'Leave Tracking' section of the Paylocity interface. The 'Leave Tracking Item Details' form is active, with the following fields: 'Tracking Item Type' set to 'Call in', 'Due Date' set to 7/1/2016, and 'Complete Date' set to 7/1/2016. A text area for 'Notes' contains the text: 'Letter confirming the verbal authorization regarding the request for leave and claim for disability benefits.' To the right, the 'Insurance Plan Payment' section includes fields for 'Check Number', 'Amount', 'Month / Year Applied', 'Start Date', 'End Date', and 'Hours'. At the bottom, there are buttons for 'Save', 'Save & Return', and 'Cancel'.

21. The Tracking Items will appear as show below:



The screenshot shows the 'Leave Tracking' section with a table of 'Tracking Items'. The table has columns for Tracking Type, Due Date, Complete Date, Check #, Amount, Applied, Notes, Start Date, and Hours. One item is listed with Tracking Type 'Call in', Due Date 07/01/16, Complete Date 07/01/16, and Check # 0001. Below the table are 'Add' and 'Delete' buttons.

- On the **Time Off** tab Click on **Time Off Documents**. Upload time off documents specific to the current employee. The size limit for each uploaded document is 15MB.



The screenshot shows the 'Time Off Documents' section of the Paylocity interface. It includes a 'Document' field, a 'Class' dropdown menu set to 'Time Off', and two date pickers for 'Received From Date' and 'Received To Date'. Below these are 'Search', 'Show All', and 'Reset' buttons. A table below shows columns for Document Name, Class, Received Date, Confidential, Notes, Uploaded Date, and Action. At the bottom, there are 'Add' and 'Delete' buttons.

2. Click the **Add** button to add a document to the current employee.

Document Details

- Document Name
- Received Date
- File
- Company Confidential?
- HIPAA Confidential?
- Notes

Available in Self Service Portal?

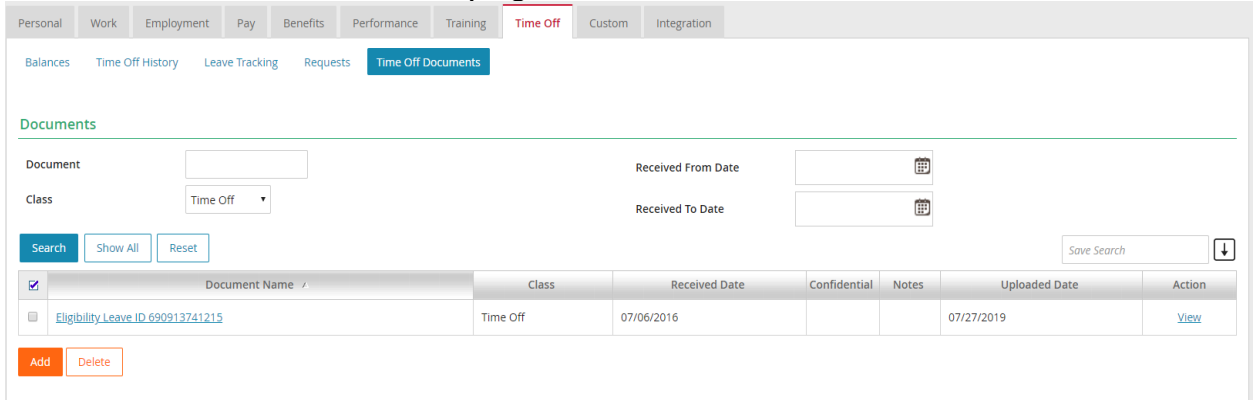
- Topic
- Link Text
- ★ Use Access Sign-Off?
- Title
- Text
- User must click "I Agree" after access?

3. Enter **Document Details**.
 - a. Enter the **Document Name** (40-character limit).
Suggestion: Use the name of the type of letter sent by The Hartford and include the Leave ID Number. Example: Eligibility ID Leave 690913741215
 - b. Select or enter the **Received Date**.
 - c. Click **Select** in the **File field** to find the applicable document and click **Open** to **upload the document**. If you made a mistake, Click **Remove** to **remove the document** before it has been saved.
 - d. Check the **Company Confidential** box to restrict access to users who have been assigned company confidential documents security rights.
 - e. Check the **HIPAA Confidential** box to restrict access to users who have been assigned HIPAA confidential documents security rights.
 - f. Enter additional information in the **Notes** field.
 - g. Check the Available in Self Service Portal box to add the document to the self-service portal.
 - h. Select the Topic where the document will display from the drop down.
 - i. Enter the Link Text (40-character limit).
 - j. Select the Access Acknowledgement box to require users to perform an electronic acknowledgement.
 - k. Click **Save**.

Important Information:

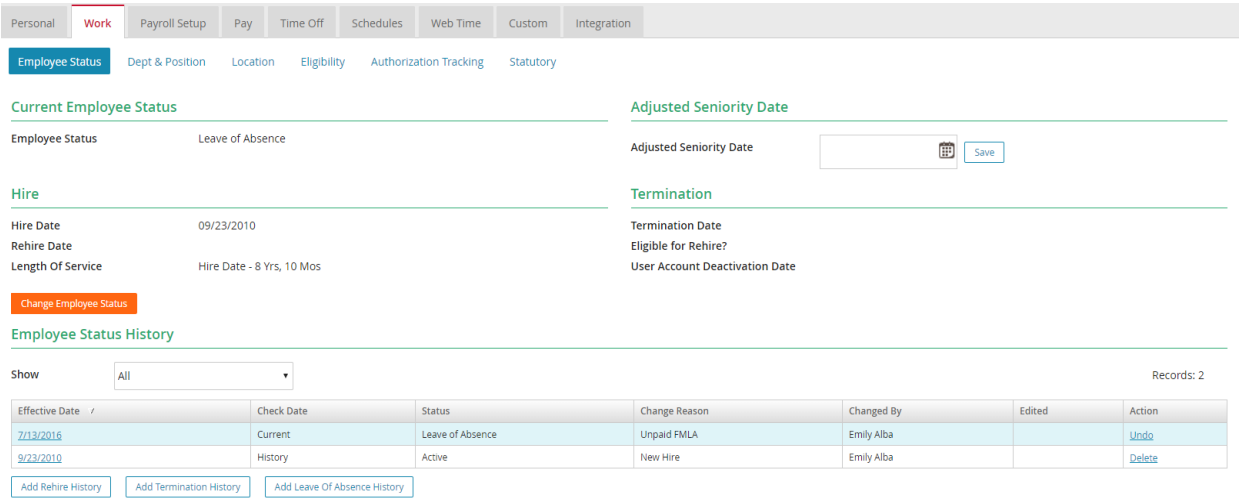
- Once the document has been uploaded and saved, the File field no longer appears.
- Paylocity employees will see documents marked as Company Confidential.
- Paylocity employees will not see documents marked as HIPAA Confidential.
- Company Confidential and HIPAA Confidential documents will not appear in the self-service portal.

- All users with edit access to the Document Details screen can mark a document confidential regardless of their security rights to see confidential documents. Once the document has been marked confidential, it will only be visible to users who have security rights to view confidential documents.



The screenshot shows the 'Time Off Documents' section in the Paylocity system. It includes a navigation bar with tabs for Personal, Work, Employment, Pay, Benefits, Performance, Training, Time Off (selected), Custom, and Integration. Below the navigation bar are sub-tabs for Balances, Time Off History, Leave Tracking, Requests, and Time Off Documents (selected). The main area contains search filters for Document, Class (Time Off), Received From Date, and Received To Date. A table lists documents with columns for Document Name, Class, Received Date, Confidential, Notes, and Uploaded Date. One document is listed: 'Eligibility Leave ID: 690913741215' with Class 'Time Off', Received Date '07/06/2016', and Uploaded Date '07/27/2019'. There are 'Add' and 'Delete' buttons at the bottom left.

4. Once the Leave of Absence is over and the employee has provided the **ADOM Medical Certification Return to Work** you need to Click on **Work Tab** (Employee Status should be highlighted.)



The screenshot shows the 'Employee Status' section in the Paylocity system. The navigation bar includes Personal, Work (selected), Payroll Setup, Pay, Time Off, Schedules, Web Time, Custom, and Integration. Sub-tabs include Employee Status (selected), Dept & Position, Location, Eligibility, Authorization Tracking, and Statutory. The main area is divided into sections: 'Current Employee Status' showing 'Leave of Absence', 'Adjusted Seniority Date' with a 'Save' button, 'Hire' information (Hire Date: 09/23/2010, Length of Service: Hire Date - 8 Yrs, 10 Mos), and 'Termination' information. Below these is an 'Employee Status History' table with columns for Effective Date, Check Date, Status, Change Reason, Changed By, Edited, and Action. The table shows two records: one for 'Leave of Absence' (Effective Date: 7/13/2016, Change Reason: Unpaid FMLA) and one for 'Active' (Effective Date: 9/23/2010, Change Reason: New Hire). There are buttons for 'Change Employee Status', 'Add Rehire History', 'Add Termination History', and 'Add Leave Of Absence History'.

5. Click on **Change Employee Status**. The **Employee Update** screen shows up as seen in step number six.
6. In the **Select Form** drop down menu select **Status Change Reactivate**

Employee Update

Employee Profile

SA
Sheppard
Allerdyce

Select Employee Action Form

Select Form

Status Change Reactivate

Status Change Termination

7. Complete the **Select Employee Action Form**.

Employee Update

Employee Profile

SA
Sheppard
Allerdyce

Employee Id
89

Employee Status
● Leave of Absence

Hire Date
09/23/2010

Length of Service
8 Years, 10 Months

Select Employee Action Form

Select Form
Status Change Reactivate

Employee Status (required)
Active

Effective Date (required)
08/15/2016

Change Reason
Reactivate

Begin Check Date (required)
08/02/2019

Note

- a. From the **Employee Status** drop-down menu select **Active**
- b. From the **Change Reason** drop-down menu select **Reactivate**
- c. Click on **Effective Date** and Enter or Select from calendar date. **Begin Check Date** field will populate accordingly automatically.
- d. Click on **Save**

8. **Employee Status** is now active. **Employee Status History** has record of **FMLA**.

Personal **Work** Payroll Setup Pay Time Off Schedules Web Time Custom Integration

Employee Status Dept & Position Location Eligibility Authorization Tracking Statutory

Current Employee Status Employee Status: Active

Adjusted Seniority Date Adjusted Seniority Date: [Calendar Icon] Save

Hire Hire Date: 09/23/2010
Rehire Date: [Blank]
Length of Service: Hire Date - 8 Yrs, 10 Mos

Termination Termination Date: [Blank]
Eligible for Rehire?: [Blank]
User Account Deactivation Date: [Blank]

Change Employee Status

Employee Status History

Show: All Records: 3

Effective Date	Check Date	Status	Change Reason	Changed By	Edited	Action
8/15/2016	Current	Active	Reactivate	Emily Alba		Undo
7/13/2016	History	Leave of Absence	Unpaid FMLA	Emily Alba		Delete
9/23/2010	History	Active	New Hire	Emily Alba		Delete