Leave Administration Procedure | Protected Leave Dashboard

Department of Human Resources Leaves Administration Team

Using the Protected Leave Dashboard

In 2019, the Department of Human Resources introduced a new dashboard to help track and manage protected leave use amongst King County employees. The dashboard summarizes protected leave use, estimates remaining protected leave balances, assists in determining protected leave eligibility, and highlights employees reporting enough non-protected leave so as to warrant further investigation for possible protected leave need.

| Employee reports appropriate leave codes (using time reporting system) | → | Reported time is approved or denied by time approvers | → | Time is processed in PeopleSoft via BRC time administrators | → | Processed, "Payable" time data exported to Tableau | → | Data visualized on dashboard to support leave administrators |

Detailed Procedures

1. If you do not already have access to the HR Analytics, Tableau site, request such access using the following KCIT HelpDesk navigation:

   "I Want Something New" → "Human Resources (DHR) – Shared Services"

2. When provided with the "HR Systems Access Request Form", please ensure that you select at a minimum the following Tableau access role:

   | ☑ Area Specific | ☐ Specific Agency: | Specific Users/ Managers |
   | | ☑ Specific Subject Matter: Protected Leaves | |

3. New Tableau users will receive an email with further instructions on how to access the site. As a reminder, bookmark or "favorite" frequent dashboards on your browser so you can easily find them.

4. Navigating the Protected Leaves Dashboard:

Tab #	Title	Purpose
1	Agency Summary	This page adds up and categorizes protected leave use, and estimates a remaining balance based on the following formula (Std. Hours/Week x 18 weeks (KCFML) – Protected Leave Use).
2	Employee Report	This page gives a summary and detailed report of hours worked and protected leave usage by employee over the past rolling calendar year. You can use these numbers to help determine eligibility.
3	Check-In	This page reports all employees in your security groups that have reported in excess of 120 hours of non-vacation leave within the past six (6) months. Can be used to inquire about possible need.
4	About	This page provides further (and most current) details about what is and is not included in the afore-mentioned pages. Also includes a list of included TRCs.

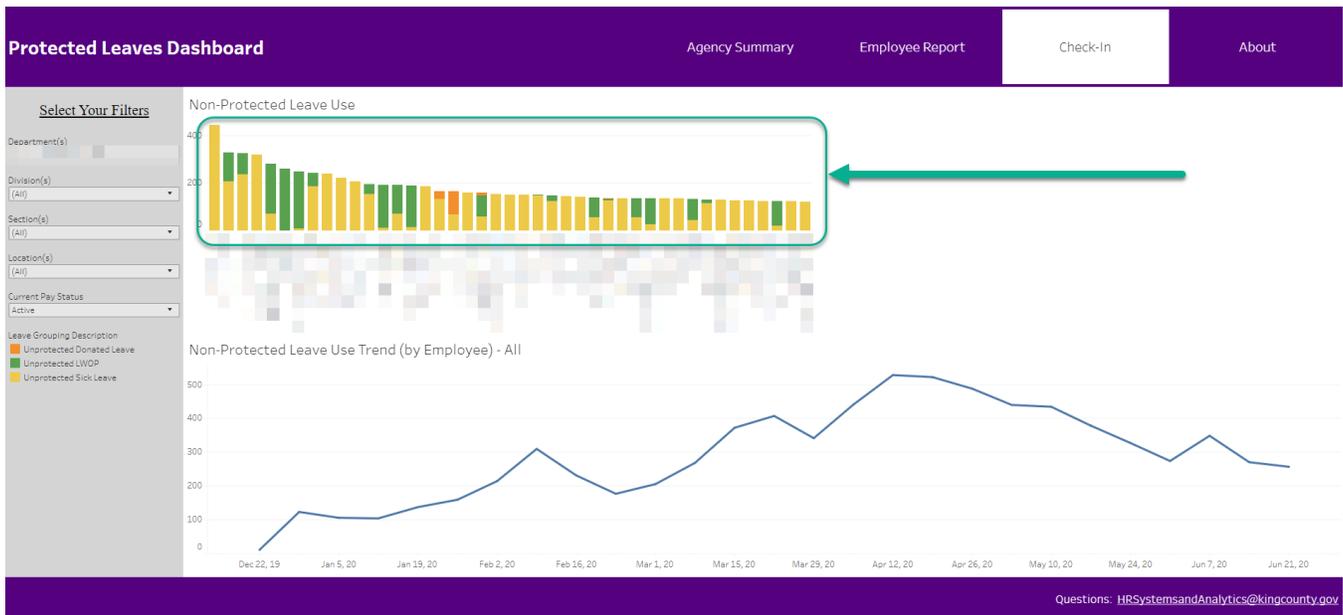5. Using the Dashboard at a Glance:

   Tab 1 (Agency Summary) – Using the color coding, review the data at a regular frequency to "disposition" employees reporting protected leave. A **red** color indicates that employees may have exceeded their available protected leave balances; an **orange** color indicates that an employee has an estimated balance of less than 200 hours remaining of protected leave; and a **blue** color indicates that an employee has an estimated leave balance of more than 200 hours remaining.

Tab 2 (Employee Report) – Use the "Eligibility Analysis" on the left side of the page to determine if employee meets appropriate criteria for granting protected leave. The rest of the screen gives the detailed analysis of what is included in "worked hours" and "protected leave" numbers in this section. If your agency uses a side system (not PeopleSoft) to report time, please be aware that this data reflects how you've chosen to map your system's hours into PeopleSoft.

Tab 3 (Check-In) – Use the bar graph at the top to identify employees who've taken more than 120 hours of non-protected, non-vacation leave in the past six months. You may use this to help identify employees who may have a need for protected leave, but have not yet communicated it. Pro Tip: Click on any person on that graph to filter the below graph, giving you a trend line by employee.

Tab 4 (About) – This page contains important information about how the graph was created, is managed, and has been changed. In the case of this dashboard, it also contains a list of all of the TRCs used that are included in the "protected leave" counts.

Notes:

This dashboard uses time reporting code (TRC) entries from PeopleSoft to provide you with a count of protected leave use over the previous rolling calendar year and estimates a remaining protected leave balance based on a person's standard hours/week.

The data displayed is only as good as the data entered into PeopleSoft. This includes both TRC codes on the timesheet and position data (i.e. Department, Division, Location).

OJI time is only reported as protected leave where the corresponding protected leave codes are used. OJI time that does not include a FMLA or KCFML indicator will be found on the "check in" page rather than the summary or employee pages.

The "check in" page only includes non-protected leave used over the past 6 months, and does not include vacation use. The list is limited to employees who took a minimum of 120 hours off over this period.

The security on this dashboard is limited to the Department for which the analyst provides service.

This is a manual dataset run by the DHR HRSA team at the end of each pay period. The query pulls by "Reported Date", which means retro-active time entry may not be immediately included. It will be accounted for on the next complete data refresh, completed quarterly.

History:

- 2.1 - Updated data source. Added PTTO filter, hours worked, and eligibility analysis. Removed year over year trends.
- 2.0 - Updated security to match 2019 re-org. Removed page specifically for Disability Services referral. Added location data. Navigation change.

Included TRCs for Protected Leave:

- 205 | FMLA-KCFML Vacation
- 206 | KCFML Vacation
- 207 | FMLA-KCFML Benefit Time
- 208 | KCFML Benefit Time
- 209 | FMLA-KCFML Don BT Taken
- 315 | FMLA-KCFML Sick Leave
- 317 | KCFML Sick Leave
- 460 | FMLA-KCFML Unpaid
- 461 | KCFML Unpaid
- 467 | FMLA-KCFML DPD Sick Taken
- 478 | FMLA-KCFML Donated Sick Leave
- 479 | FMLA-KCFML Donated Vacation
- 487 | FMLA-KCFML Comp Time
- 488 | FMLA-KCFML Executive Leave
- 489 | FMLA-KCFML Holiday Bank
- 492 | FMLA-KCFML Personal Holiday
- 493 | KCFML Personal Holiday
- 497 | KCFML Donated Vacation
- 498 | KCFML Donated BT Taken
- 499 | KCFML Donatd Sick Leave

Included TRCs for Protected Leave (cont.):

- 501 | KCFML Comp Time
- 502 | KCFML Executive Leave
- 503 | KCFML Holiday Bank
- 512 | JI Leave w/o Pay FMLA-KCFML
- 517 | JI Leave FMLA-KCFML w/ Accruals
- 531 | JI Medical FMLA-KCFML
- 537 | JI Treatment FMLA-KCFML
- 546 | JI Day of Injury FMLA-KCFML
- 557 | JI Special Sick Pay FMLA-KCFML
- 558 | JI Special Sick Pay KCFML
- 564 | FMLA-KCFML Fed Emerg Pd Sick
- 565 | KCFML Emerg Pd Sick Lv Taken
- 653 | FMLA-KCFML NonExempt EL Taken
- 751 | Parental Leave Taken
- 754 | FMLA-KCFML Paid Parental Parental Leave
- 755 | KCFML Paid Parental Parental Leave

* Includes all Equivalent AM/PM Codes

Included TRCs for Non-Protected Leave:

- 001 | Exempt Partial Day
- 292 | Donated Vacation Taken
- 300 | Sick Leave Pay
- 382 | Donated Sick Taken
- 412 | WA State PFML Unpaid Leave
- 442 | Donated Emergency Taken
- 450 | Leave without Pay
- 451 | LWOP with Accruals
- 464 | Sick Taken DPD
- 515 | JI Leave Hours with Accruals
- 516 | JI Leave without Pay
- 530 | JI Medical
- 559 | JI Special Sick Pay
- 563 | Emerg Pd Sick Lv Act Taken

6. Interpreting the Protected Leaves Dashboard:
    - **KEY CONCEPT: The data on the dashboard reflects the data entered in PeopleSoft, and is only as good as entered. To improve accuracy, consider using time saved tracking to improve time reporting at its source.**
    - The dashboard pulls in data from PeopleSoft on a bi-weekly basis after payroll has been processed. It is very good at helping you find issues to manage amongst all employees; however, the most accurate and up-to-date information for a particular person can still be found via PeopleSoft query.
    - Data within Tableau reflects the rolling calendar year (the last 12 months), as of labeled pay periods.
    - Security is typically set at the Department level.
    - Data within Tableau cannot be edited or manipulated, but can be filtered.

Employer responsibilities:

Agency Human Resource Professionals/Leave Administrators
- Check dashboard on a bi-weekly basis to ensure that employees are not exhausting protected leave balances.
- When employees are approaching exhausted leave balances, reach out to disability services to determine need for additional accommodation.
- Understand limitations of the dashboard. The data is pulled from PeopleSoft and only reflects the data entered. If data is not perfect, dashboard will not be either. Use PeopleSoft query to supplement/verify data when needed.
- Help inform/instruct agency timekeepers and supervisors as to appropriate use of protected leave TRCs.
- Keep current with dashboard changes as highlighted in the "History" section of the "About" page.

DHR Systems and Analytics Team
- Grant and manage access as requested.
- Upkeep data on a bi-weekly basis and make dashboard improvements/enhancements as needed.

DHR Leave Administration Advisor: Brian Czerwinski
- Serve as SMEs on protected leave use, and inform DHR Systems and Analytics team when changes are needed on dashboard (for example: TRCs need to be added or removed from dashboard).
- Help with outreach and improve usage of dashboard to support protected leave administration.
- **Email**: Brian.Czerwinski@kingcounty.gov   **Phone**: 206-263-2501

Agency Timekeepers/Supervisor
- In coordination with agency human resource professionals/leave administrators, work with the supervisor and employee to use time reporting codes correctly.

Resources
- Video URL of training is located on DHR Leave Administration team TEAMS site. If you need access, please email Brian Czerwinski