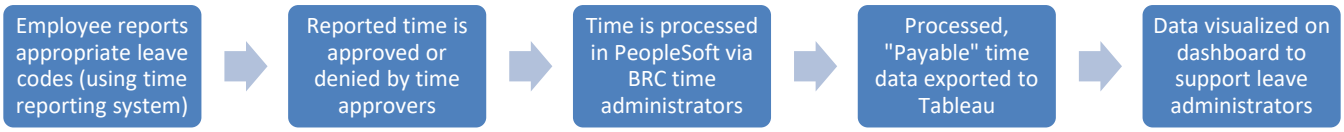
Leave Administration Procedure | Protected Leave Dashboard

Department of Human Resources Leaves Administration Team

King County

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.



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 Subject Matter: Protected Leaves | Specific Users/ Managers

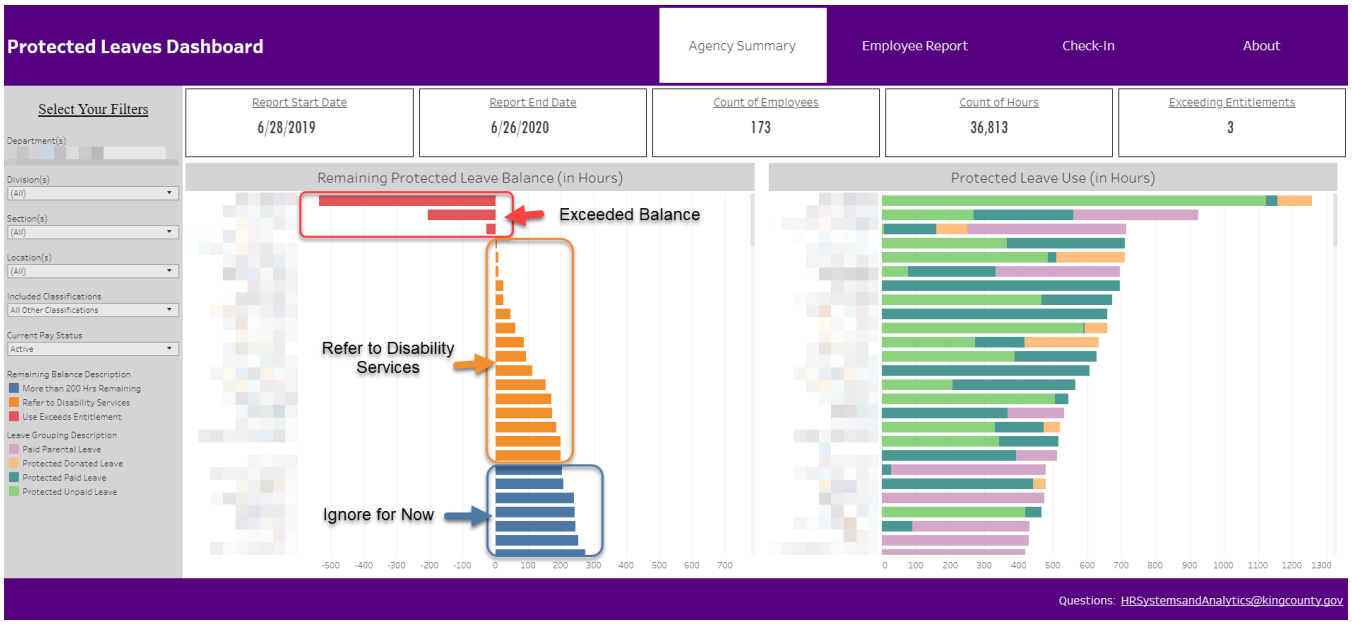
3. New Tableau users will receive an email with further instructions on how to access the site. As a reminder, bookmark or "favorite" frequent dashboards on your browser so you can easily find them.

4. Navigating the Protected Leaves Dashboard:

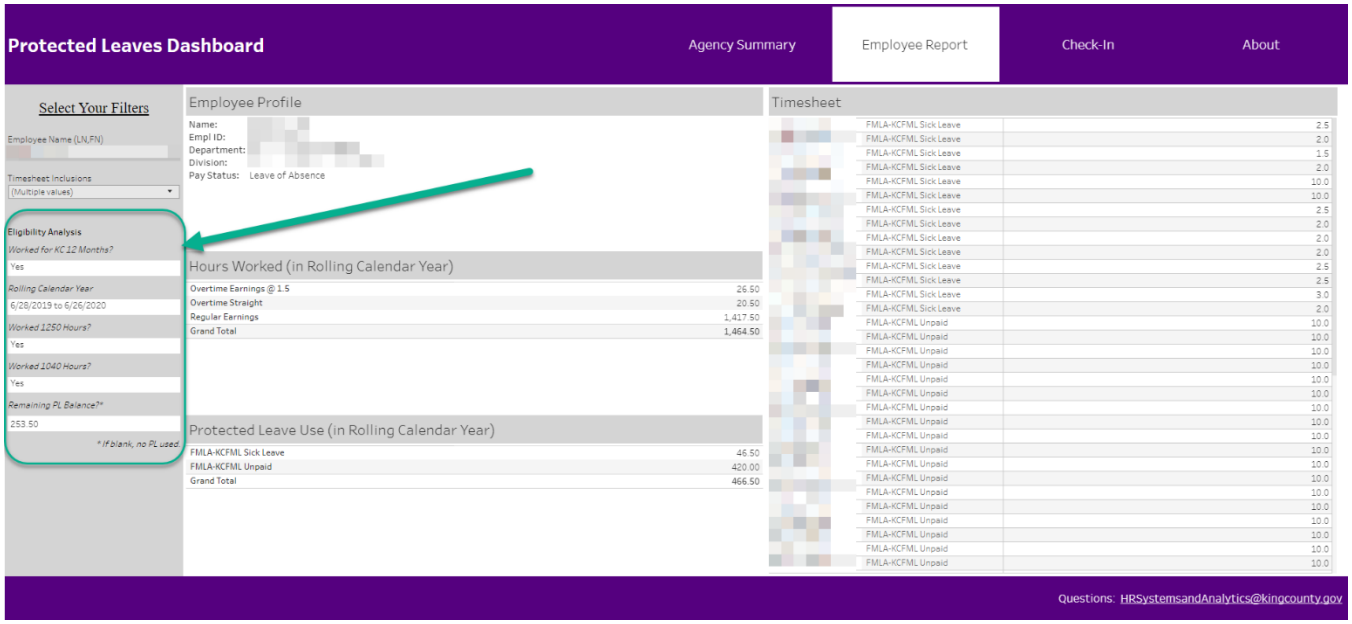
Tab #	Title	Purpose
1	Agency Summary	This page adds up and categorizes protected leave use, and estimates a remaining balance based on the following formula (Std. Hours/Week x 18 weeks (KCFML) – Protected Leave Use).
2	Employee Report	This page gives a summary and detailed report of hours worked and 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:

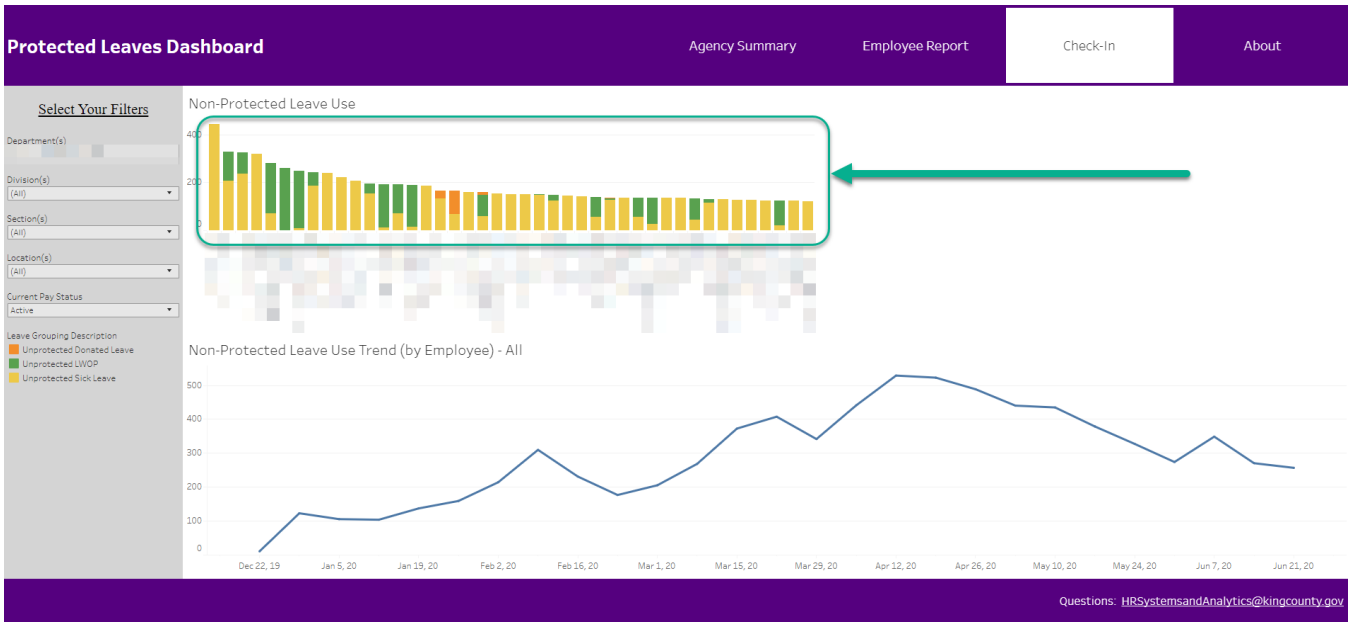
   Tab 1 (Agency Summary) – Using the color coding, review the data at a regular frequency to "disposition" employees reporting protected leave. A **red** color indicates that employees may have exceeded their available protected leave balances; an **orange** color indicates that an employee has an estimated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



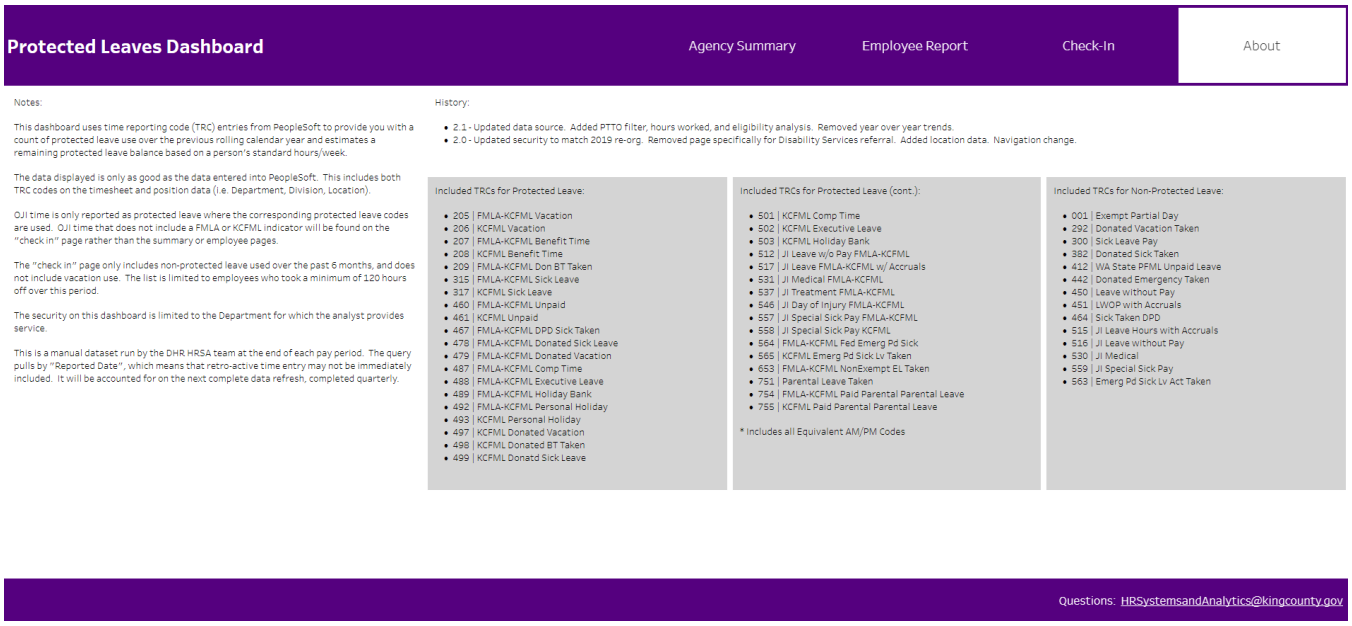
Tab 2 (Employee Report) – Use the "Eligibility Analysis" on the left side of the page to determine if employee meets appropriate criteria for granting protected leave. The rest of the screen gives the detailed analysis of what is included in "worked hours" and "protected leave" numbers in this section. 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.



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