# Tables

# Reports

# Appendix ....................................................................................267

# Preface

# About this Document

## Who Should Use This Document

This User's Guide is for eRMS Users, Attendance Control Office Personnel, and Managers of Postal Facilities.

This User's Guide assumes that the reader is familiar with PC usage and computer terminology, including:

- Powering on a Personal Computer (PC).

- Using a Windows Operating System (OS) (95/98/NT) (2000).

- Logging in to a network (LAN).

- Internet/WWW browsing/navigation via a Windows-based browser (Internet Explorer/Netscape Navigator).

- An understanding of general PC terminology (i.e. 'PC' is an acronym for 'Personal Computer').

This document contains some language speaking to non-computer related processes such as the Family and Medical Leave Act, the ELM, Postal document handling, etc. This User's Guide is not the authority on these items. Each reader/user should have prior training and experience before using eRMS in these capacities. In addition, excerpts from official documents such as the ELM are subject to change. Please check your official document provider(s) often for any changes.

# Overview of eRMS

The Enterprise Resource Management System (eRMS) is a tool used to:

- Help management record, track, and manage attendance.

- Identify attendance problems (evaluate individual pay location attendance trends; detect absence abuse; avoid vacation conflicts).

- Produce reports.

- The eRMS application maintains and tracks employee data that relates to leave.  Specific information gathered includes:

- Family Medical Leave Act (FMLA) absences, hours used in an aggregate total as well as per individual FMLA case, instances used per FMLA case, and work hours in the last 26 pay periods.

- Sick Leave/Dependent Care (SLDC) hours used in the leave year.

- Number of unscheduled absences in the last 90, 180 and 365 days.

- All scheduled, unscheduled, and denied leave.

- Administrative actions and grievance data related to attendance.

# User Interface

The eRMS user interface is comprised of multiple Windows that contain:

- Text.

- Required data entry fields.

- List boxes.

- Function buttons.

- Icons.

- Scroll bars.

## *Data Entry Window*

*Data entry* describes generic eRMS Windows where data collected is used to update the database. The View/Enter Leave Window is an example of a Data Entry Window.

Typical input elements on eRMS data Windows include:

- List boxes to select data. [Arrow 1]

- Text fields to type in data. [Arrow 2]

- Buttons to select functions. Click in box to select (or deselect) an entry. [Arrow 3]

**1** ⟶

**2** ⟶

**3** ⟶
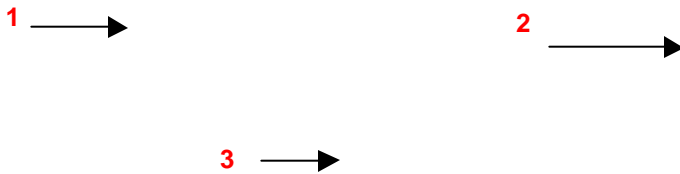
To scroll forward or backward a month at a time, click the forward **>>**or back **<<** scroll button located in front of and behind the current and next month that the calendar defaults to.

## *Report Window*

A Report Window (a new Internet Window) displays when you click the **Print or Print All button** on any eRMS data Window.  The window will need to be **maximized** after it appears on your screen.  This can be accomplished by clicking the middle button on the top right-hand portion of the window.  Acrobat Reader may also launch when you attempt to print a report.  This is normal and requires no action on your part other than waiting for it to launch.

> Page to Page
> navigation buttons.

# *Navigating eRMS Report Windows*

## *Scrolling in Windows*

- To scroll up and down, use the vertical scroll bar on the right side of the Window.

- To scroll side to side, use the scroll bar at the bottom of the Window.

### Moving from Page to Page

- To move to the first page of a report, press |◀ .
- To move to the last page of a report, press ▶|.
- To move forward a single page, press ▶ .
- To move back one page, press ◀ .

### Printing Reports

To print a report:

1. Click the                icon or Click File and then Print in the Internet toolbar.

2. The Print Window displays.

3. Select the number of copies.

4.   Click **OK**.

# *Export Window (Saving Report Data)*

### Saving (Exporting) Report Data

To **Save** report data, click the                              icon in the Internet toolbar on any **Report** Window. The Export Window displays (see below.)

 Use this Window to save data onto your hard drive or a floppy disk

**To save report data:**

1.   Click the Save Report               icon on a Report Window.

2.   In the Save in list, click the folder where you want to save your file. [Arrow 1]

3.   Type a file name in the File name box. [Arrow 2]

**Enterprise Resource Management System (eRMS) User Guide, Version 3.5.1, December 2001**

4.  In the Save as type list, select Adobe PDF Files (*.pdf). [Arrow 3]

5.  Click Save. [Arrow 4]

# Chapter 1 - eRMS Main Menu

# Overview of eRMS Main Menu

The eRMS Main Menu offers the following functions to aid you in performing the tasks associated with your role and responsibilities:

| Use this function… | on page | To perform these tasks … |
|---|---|---|
| **System Administration (button is only available to System Administrators)** | **41** | Maintain eRMS User information.  Add, update, delete and restrict eRMS application access.  Set message generation thresholds and update time parameters used to notify and remind specified users of outstanding tasks. Reassign users on a temporary basis. Cross-reference finance number with pay locations in order to determine missing roles. |
| **Employee Management** | **73** | Create and maintain employee personnel information, including adding new employees and updating base, current and next week schedules.<br><br>View and edit data for *multiple employees*; print schedules for all employees in a pay location range; determine how many employees will report to work at a specific time; generate the data that displays in the Leave Usage Logs. |
| **Actions** | **97** | Enter leave, FMLA, Administrative Action, Supervisor Comments, Set Review Dates, Tag Employees data and generate or review reports for a *single* employee. |
| **Reports** | **185** | Generate any of numerous canned reports listing such items as FMLA re-certifications, employees without unscheduled absences, or a list of outstanding messages, by applicable name.<br><br>View various aggregate leave reports, work-hour reports, FMLA message and documentation reports. |
| **Messages** | **228** | Receive, forward or reply to System Generated Messages; send a broadcast message to all eRMS users, send a message to a particular user or create and mail to a private mailing list. |

# Using eRMS

## *Starting eRMS*

To start eRMS from your workstation:

1. Click the Start button.

2. Go to the "Programs" option.

3. Select Internet Explorer. These steps open the Microsoft Internet Explorer, most likely defaulted to your USPS Intranet home page as below.

4.  In the address box, highlight and delete the http://blue.usps.gov and type
    http://rmdweb.usps.gov/ **OR** http://blue/tacs.  (no periods)  This will bring you either to the IRM
    (Integrated Resource Management) Home Page or the TACS (Time and Attendance Collection
    System) Home Page, shown below.

5.  Click **eRMS/RMD Login (restricted).**

6.  This will take you to the **System Logon screen** (below).

eRMS Main Menu

This is actually for the TACS system logon option screen.

7.  Click **eRMS Production** for access to your site's database.  Click **eRMS Training (Site Administrators)** for access to the training database.

8.  This will launch the initial eRMS Login Screen.  (below)  Click **Login**.

9. This will initialize the Applet (you will see a message **Loading Java Applet…**).  It will also launch the Oracle Developer Server before presenting the eRMS Login Screen.

**(These 2 print screens are ½ normal size.)**

## *Logging In*

At the **eRMS Login** Window:

1.  Type your assigned user name.

2.  Tab to the password box.

3.  Type your password.

4.  Click **Login**.

5.  The United States Postal Service Splash Screen appears.

6.  Click **Continue** to reach the eRMS Main Menu Screen.

7.  If messages are waiting for user review, the eRMS Message Inbox displays (detailed information on dealing with Message Inbox in Chapter 4).  Otherwise, the eRMS Main Menu displays.

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**Note:** If you type your user name incorrectly, you will see the following error message.

You will need to click **OK** and **retype** your user name. The system will also tell you how many tries you have remaining before locking up your account.

If you type your password incorrectly, you will see the following error message.

You will need to click **OK** and **retype** your user name.

If you enter the wrong user name and/or password or any combination of them three consecutive times, you will receive the following Login error message and the Internet window will close. The Oracle Forms Server Window will remain open. You will need to close it (using the X in the upper right-hand corner) before you can attempt to launch eRMS again.

You will not be able to use eRMS until the eRMS Administrator unlocks your account.

**Note:** To avoid being locked out of eRMS, click **Cancel** if you receive the error message on the second attempt to login. Start the entire Login process over.

## *Logging Out*

Click **Log Out/Exit** (on the eRMS Main Menu – 1st screen below) to return to the initial eRMS Login Screen (2nd screen below). You must then close that window (using the X in the upper right-hand

corner) in order to return to your computer desktop. Occasionally, the initial eRMS Login Screen (2nd screen) will not appear when you click Log Out/Exit, the 3rd screen below will. Again, you will need to close that window using the X in the upper right-hand corner in order to return to your computer desktop.

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**WARNING:** When you are using eRMS, you will also see Oracle Forms open on your task bar. This refers to this background window for the Log In process. **Do Not Close this Window – it will close the eRMS Application as well. Also**, if you were to activate the Oracle Forms button on your task bar, the 3rd screen below is what you would see. You will also see it when you **minimize** eRMS. **Minimize** the Oracle Forms window; **do not close it**.

---

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**WARNING:** If you arrive at the Login Screen which is asking for your User ID and Password, and decide that you **do not want** to Login at this time, **do not click the X in the corner of the screen. Click the LogOut/Exit button.** This will allow the application to shut down properly and avoid unnecessary error messages.

---

**Enterprise Resource Management System (eRMS) User Guide, Version 3.5.1, December 2001**

The eRMS Login Screen.

The Initial eRMS
Login Screen.

The Oracle Form Window – DO NOT CLOSE THIS WINDOW UNTIL YOU ARE LOGGED OUT OF eRMS -  THIS WILL CLOSE THE APPLICATION AS WELL.   JUST MINIMIZE IT WHENEVER YOU ARE IN eRMS.

## *Changing the Login Password*

To change your password:

At the **eRMS Login** Window:

1. Type your assigned user name.

2. Tab to the password box.

3. Type your password.

4. Click **Login**.

5. The United States Postal Service Splash Screen appears.

6. Click **Continue** to reach the eRMS Main Menu Screen.

7. If messages are waiting for user review, the eRMS Message Inbox displays (detailed information on dealing with Message Inbox in Chapter 4).  Otherwise, the eRMS Main Menu displays.

8. Click **Change Password** in the eRMS Login Window.

9. The eRMS – Change Password Utility Window displays.

10. Enter the new password.

11. Tab to the "**Confirm new password**" entry box.

12. Type the new password exactly the same as you did in the "**Enter new password**" entry box.

13. Click **Submit**.

14. Password Successfully Changed window appears.

15.  Click **OK** to continue Login process.

16.  The United States Postal Service Splash Screen appears.

17.  Click **Continue** to reach the eRMS Main Menu Screen.

**Note:**    eRMS **requires** that all users change passwords every thirty (30) days.  When a user attempts to login with a password that is thirty days (or more) old, eRMS will prompt the user to change the password. Follow the steps below to accomplish this system-forced password change.

18.  Click **OK** to your **password has expired** message.

19. The eRMS **– Change Password Utility** window appears.

20. Enter the new password.

21. Tab to the  "Confirm new password" entry box.

22. Type the new password exactly the same as you did in the "Enter new password" entry box.

23. Click **Submit**.

24. Password Successfully Changed window appears.

25. Click **OK** to continue Login process.

26.  If messages are waiting for user review, the eRMS Message Inbox displays (detailed information on dealing with Message in Chapter 4).  Otherwise, the eRMS Main Menu displays.

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## *Help Desk*

Should you experience **system** problems using eRMS, follow these steps to contact the Customer Support Services for assistance:

1.  **Dial 1-800-USPS-HEL**(p)   /   (1-800 877-7435); then press
2.  **Option 3**  (AOI -Post Office Support); then press
3.  **Option 5**  (Human Resources Applications Support Services); then press
4.  **Option 1**  (Enterprise Resource Management Database (eRMS)).

Support services for this application are available 24 hours a day / 7 days a week.

See page 39 for **non-critical** problems using eRMS.

# *eRMS Web Page*

eRMS has it's own web page.  It can be found by typing http://rmdweb.usps.gov in the location box on your web server.

From the eRMS Web Site, some of the items you can access are:

- The eRMS User's Guide                          Frequently Asked Questions

- Training Information                    Policy Application Information

- Site Implementation Checklists              Staff Directories

- Site Management (restricted access)        Important Updates

- Online Knowledge Base/Help Desk (explained below)

# Online Knowledge Base/Help Desk

Open the RMD Home Page, http://rmdweb.usps.gov.  Click on **Online Knowledge Base/Help Desk**.  The Online Knowledge Base/Help Desk will open.

(you may have to use the scroll bar in order to see all of the possible buttons)

Click **Search the PAQ (Previously Asked Questions) Database** .

Enter a key word (such as schedules) and click **Submit** (may have to move the scroll bar down).

A list of the previously asked questions about FMLA appears, with most of the question itself shown.

Click on the **Ticket Number** and that ticket and it's answer will appear.

Click **OK** at the bottom of the screen to return to the list of questions related to your keyword.

Click **Cancel** at the bottom of the list to return to the Search Parameter Screen.

Click **Cancel** at the bottom of the screen to return to the Main Menu.

## *Submitting a Question*

From the Main Menu, click **Open a New Ticket.**

Complete all requested information and click **Submit**.  This will forward your question to one of the RMD/eRMS experts and you will receive an email message when your question has been answered.

If you do not know your email address, click **Address Lookup**.  A new window will open.

Follow the instructions and click **Find Matching Entries**.  All matching entries will appear.

Copy down **your** email address and close this window.  You can now type it into the required boxes in the Ticket.

If you need help with your login ID, click **Login Help**.  The following window will appear.  You may click the **x** to close it and return to your Ticket.

When you are finished entering your question, click **Submit**.

The turn-around for your question's answer is normally no more than 2 days.

As is the nature with web-based systems, the IRM Online Knowledge Base/Help Desk user interface is subject to change.  This guide is intended as a reference point only.  See http://rmdweb.usps.gov for the latest updates.

# Chapter 2 - eRMS System Administration

The eRMS System Administration utility allows the system administrator to:

- Manage user access to eRMS data and functions including reassigning users on a temporary basis.

- Establish business thresholds (including time parameters used to notify and remind specified users of outstanding tasks).

- Cross-reference finance numbers with pay locations in order to determine which combinations may be missing role assignments.

# Starting eRMS System Administration

1. From the Main Menu, Click **System Administration**.

# System Administration

Clicking the System Administration Button (if you have access) presents the Administration Functions of eRMS. This functionality allows the Site Administrator to maintain eRMS User Information.  The Administration Functions are as follows: (Complete instructions for use of each Administration Function can be found on the page indicated beside the function listed below.)

| System Administration Button | Pg. | Administrative Functions |
|---|---|---|
| **User Maintenance** | **44** | **Add, Edit, Delete Users** <br> **Assign Finance Number/Pay Location Access to Users** <br> **Lock or Unlock Users** |
| **Business Rules** | **58** | **Set Escalation Wait Time** <br> **Set Number of Unscheduled Absences in 90 Days** <br> **Set Time Zone** |
| **Temporary Reassignment** | **60** | **Temporarily reassign users to another user for system generated messages** <br> **Temporarily give one user the responsibility for pay locations of another user** |
| **Message Hierarchy and Role Definition** | **68** | **Message Hierarchy and Role Definition Report** <br> **Pay Location/Role Cross Reference Report** <br> **Unassigned Mandatory Roles Report** |

# User Maintenance

---

**REMINDER:  You cannot add a user to eRMS until AFTER you have added that employee to the eRMS Database using the Employee Information Administrator.**  See Chapter 3a, Employee Management, for further information on the process of adding an employee to the eRMS Database.

---

## *Add User*

When you activate **User Maintenance** by clicking the button on the System Administration Screen, the User Maintenance will default to the **Add User** mode.  The screen above is what you will see when User Maintenance is activated.

---

To **Add a User**:

1. Type in the User ID you wish to assign to this user. It must be **between 6 and 8 characters long**. The only characters available to use in User ID are alpha characters A-Z and numerical characters 0-9. Hit **Enter key** upon completion of this field.

2. Hitting the Enter key upon completion of the User ID will enable the rest of the editable fields on the screen. The cursor will default to the Employee ID Field. As you can see by the screen shot below, the Employee Name, Finance # and Pay Location remained 'greyed' out; that is, they are **not** editable fields. These fields will populate based upon the Social Security Number entered in the Employee ID field. Therefore, it is **mandatory** that the employee already be in the eRMS database before attempting to make them a User.

3. Type the employee's Social Security Number in this field. This will auto-complete the Finance Number, Pay Location and Employee Name fields, as shown below. It will also move the cursor to the Password field.

4. Enter the password you are assigning this User.  It must be **between 6 and 8 characters in length**. The only characters available to use in User ID are alpha characters A-Z and numerical characters 0-9.  **Passwords may not start with a numerical character**.

5. Hit Enter Key and type the same password in the Verify Password Box.

6. You must now assign a role to the User.  Highlight a role with your mouse by clicking on the Title of the Role you wish to assign to this User.  You will receive the following error message if you forget to assign a Role and click Save.  Below that screen, is a table to assist you in deciding which role to use, dependent upon the User's Position within Operations or Customer Service.

| Position | Role | Position | Role | Position | Role |
|---|---|---|---|---|---|
| Attendance Control Supervisor | ACS | MCSO | Manager | SCS | Supervisor |
| DM | Sr. Manager | MDO | Manager | SDO | Supervisor |
| FMLA Coordinator | FMLA Coor | MPOO | Sr. Manager | Site Administrator | Admin |
| Human Resources | HR | Plant Mgr | Sr. Manager | Site Coordinator | Site Coord |
| Labor Representative | Labor Rep | PM | Sr. Manager | Sr MDO | Sr. Manager |
| MCS | Manager | Report Only | Rpt Only | | |

7.  Once you have completed all the necessary information, including the Role, click **Save**.

    If you click **Access** instead of **Save**, you will receive the following warning that the information already entered needs to be saved before continuing. If you receive this warning, click **ok** and you will then be taken to the User Access Screen.

8.  This will save the User's basic information and bring you to the **User Access Screen**.

9.  Under **Available Pay Locations**, you will see all of the finance number/pay location combinations to which you, **the Administrator**, have been assigned responsibility for. If you activate the Finance # drop-down list, it will show you the List of Valid Finance Numbers available to you, the Administrator, to assign to this User. (Click Cancel to remove this list.)

---

**NOTE:** You must have access yourself, as Administrator, to the Finance Number/Pay Location combination that you wish to assign to a new, or existing, User. **Therefore, if you have new Finance Number/Pay Locations assigned to your area, you must contact the Super Administrator to have access given to your Administrator accounts in order to disburse responsibility for them throughout the rest of the eRMS Roles. You will need to contact your Area Representative for access to any new Finance Numbers assigned to your area.**

---

10. To assign Finance Number/Pay Locations to the new User you have just created, highlight (by clicking your mouse over it) the finance number/pay location you wish to assign this user.

---

**Note:** Be aware, that the pay locations you assign to any particular user **limits** that user to viewing **only** the employees located in those finance number/pay location combinations. If new finance numbers/pay locations are added to your system, you must assign responsibility for them to all of the appropriate users, i.e. the appropriate ACS, Supervisor, Labor Relations, FMLA Coordinator, Manager, Sr. Manager, Site Admin users.

---

11. Click the [>] button in the middle of the screen. This will transfer the highlighted finance number/pay location to the **Assigned Pay Locations** side.

12. If you make a mistake and wish to remove a finance number/pay location, highlight the desired line and click the [<] button to move it back to the Available Pay Locations side.

13. Click Save. This will commit the assignment to the database. (Click OK to the Save Successful box.)

14. Click Close. This will return you to the User Maintenance Screen.

15. Click Close. This will return you to the System Administration Screen.

16. Click Close. This will return you to the eRMS Main Menu.

---

**NOTE:** If you wish to assign multiple finance number/pay location combinations at one time, hold the Shift Key down while clicking the top and bottom of the set of combinations you want. This will work if they are all adjacent to each other. If the choices you want are not adjacent to each other, you will need to hold down the Control (Ctrl) Key while clicking the lines that you wish. When completed highlighting the desired lines, click the [>] button to transfer them to the Assigned Pay Locations side. If you wish to assign ALL Finance Number/Pay Location combinations to a User, simply click the [>>] button.

---

**Holding Shift Key and clicking 01-8250 Tuscaloosa AL /000 Default and 01-8250 Tuscaloosa AL / 301 Name Unavailable.**

**Holding Ctrl Key and clicking 01-8250 Tuscaloosa AL /000 Default, 003 Name Unavailable, 101 Name Unavailable, 204 Name Unavailable and 301 Name Unavailable.**

**NOTE:** eRMS assigns pay locations to their finance numbers. This is to accommodate facilities that have the same pay location in multiple finance numbers. **BE CAREFUL** when assigning pay locations that you have chosen the **proper** finance number.

## *Edit User*

When you activate **User Maintenance** by clicking the button on the System Administration Screen, the User Maintenance will default to the **Add User** mode. The initial screen in the Add User portion of this chapter is what you will see when User Maintenance is activated.

To **edit a user:**

1. Select a user name from the User ID drop-down list. (Highlight by clicking the desired line with mouse and click ok.)

2.  The User Maintenance screen will populate with the information of the User chosen.

3.  You can edit any of the information **except** the default fields of User ID, Employee Name, Finance Number and Pay Location.

**NOTE**:  This means that you can change the User assigned to a User ID but you cannot change the User ID assigned to a User.   If you are creating a second User for the same employee, you will be given this warning message that the Employee ID is already assigned to another User.  Simply click the OK button and continue adding the User.

4.  Make the necessary changes to the user information.

---

---

**Note:** The eRMS User Maintenance Window that displays after you select a User will be completely populated with the current information of the user you are editing.

---

5. **Highlight** the field you want to change.

6. **Delete** the current information.

7. **Type** the new information.

8. If the user's **System Role** is changing:

9. Highlight and click the mouse over the new Role.

10. Click **Save**. This will save the changes to the database.

11. If you need to change the **Access** the User has (Finance Number/Pay Location responsibilities), click **Access**.

12. This will open the User Access Screen. Highlight the finance number/pay location combination (s) you wish to add or delete from the User's Responsibility and click the appropriate button, either [>] to add or [<] to delete. Again, if you wish to move multiple combinations, hold down either the Shift Key (adjacent lines) or the Ctrl Key (non-adjacent lines) when you are highlighting the combinations.

13. Click **Save**.

14. Click **Close, Close, Close** to return to the eRMS Main Menu.

---

**NOTE:** eRMS Version 3.5.1 assigns pay locations to their finance numbers. This is to accommodate facilities that have the same pay location in multiple finance numbers. **BE CAREFUL** when assigning pay locations that you have chosen the **proper** finance number.

---

**Note:** Again, be aware, that the pay locations you assign to any particular user **limits** that user to viewing **only** the employees located in those finance number/pay location combinations. If new finance numbers/pay locations are added to your system, you must assign responsibility for them to all of the appropriate users, i.e. the appropriate ACS, Supervisor, Labor Relations, FMLA Coordinator, MDO, Site Admin users.

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## *Delete User*

When you activate **User Maintenance** by clicking the button on the System Administration Screen, the User Maintenance will default to the **Add User** mode. The initial screen in the Add User portion of this chapter is what you will see when User Maintenance is activated.

 To **delete a user:**

Select a user name from the User ID drop-down list. (Highlight by clicking the desired line with mouse and click ok.) The screen will populate with the information for the User you have selected.

---

1.  Click **Delete User** button.

2.

3.  Click **Okay**.

4.  Click **Close**, **Close** to return to the eRMS Main Menu Screen.

# *Assign Finance Number/Pay Location Access to Users*

When you activate **User Maintenance** by clicking the button on the System Administration Screen, the User Maintenance will default to the **Add User** mode.  The initial screen in the Add User portion of this chapter is what you will see when User Maintenance is activated.

 To **assign finance number/pay location access to a user:**

1.  Select a user name from the User ID drop-down list. (Highlight by clicking the desired line with mouse and click ok.)   When you are adding a new user, the system will automatically take you directly to the User Access screen when you save the information for the new user.

2.  Click **Access** button.  This will activate the User Access Screen.

3.  Under **Available Pay Locations and Assigned Pay Locations**, you will see all of the finance number/pay location combinations to which you, **the Administrator**, have been assigned responsibility for.  If you activate the Finance # drop-down list, it will show you the List of Valid Finance Numbers available to you, the Administrator, to assign to this User. (Click Cancel to remove this list.)

**NOTE:**  You must have access yourself, as Administrator, to the Finance Number/Pay Location combination that you wish to assign to a new, or existing, User. **Therefore, if you have new Finance Number/Pay Locations assigned to your area, you must contact the Super Administrator to have access given to your Administrator accounts in order to disburse responsibility for them throughout the rest of the eRMS Roles.  You will need to contact your Area Representative for access to any new Finance Numbers assigned to your area.**

4.  To assign Finance Number/Pay Locations to the User you are editing, highlight (by clicking your mouse over it) the finance number/pay location you wish to assign this user. (OR click the mouse over a finance number/pay location in the Assigned Pay Locations column to remove a responsibility from the user.)

**Note:** Be aware, that the pay locations you assign to any particular user **limits** that user to viewing **only** the employees located in those finance number/pay location combinations. If new finance numbers/pay locations are added to your system, you must assign responsibility for them to all of the appropriate users, i.e. the appropriate ACS, Supervisor, Labor Relations, FMLA Coordinator, Manager, Sr. Manager, Site Admin users.

5. Click the [>] button in the middle of the screen. This will transfer the highlighted finance number/pay location to the **Assigned Pay Locations** side.

6. If you make a mistake and wish to remove a finance number/pay location, highlight the desired line and click the [<] button to move it back to the Available Pay Locations side.

7. Click Save. This will commit the assignment to the database. (Click OK to the Save Successful box.)

8. Click Close. This will return you to the User Maintenance Screen.

9. Click Close. This will return you to the System Administration Screen.

10. Click Close. This will return you to the eRMS Main Menu.

**NOTE:** If you wish to assign multiple finance number/pay location combinations at one time, hold the Shift Key down while clicking the top and bottom of the set of combinations you want. This will work if they are all adjacent to each other. If the choices you want are not adjacent to each other, you will need to hold down the Control (Ctrl) Key while clicking the lines that you wish. When completed highlighting the desired lines, click the [>] button to transfer them to the Assigned Pay Locations side. If you wish to assign ALL Finance Number/Pay Location combinations to a User, simply click the [>>] button.

**Holding Shift Key and clicking 01-8250 Tuscaloosa AL /000 Default and 01-8250 Tuscaloosa AL / 301 Name Unavailable.**

**Holding Ctrl Key and clicking 01-8250 Tuscaloosa AL /000 Default, 003 Name Unavailable, 101 Name Unavailable, 204 Name Unavailable and 301 Name Unavailable.**

---

**NOTE:** eRMS assigns pay locations to their finance numbers. This is to accommodate facilities that have the same pay location in multiple finance numbers. **BE CAREFUL** when assigning pay locations that you have chosen the **proper** finance number.

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## *Lock User, Unlock User*

When you activate **User Maintenance** by clicking the button on the System Administration Screen, the User Maintenance will default to the **Add User** mode. The initial screen in the Add User portion of this chapter is what you will see when User Maintenance is activated.

To **lock or unlock a user:**

Select a user name from the User ID drop-down list. (Highlight by clicking the desired line with mouse and click ok.) The screen will populate with the information for the User you have selected.

1. To Lock a User, click your mouse within the check box beside the word 'Locked'. This will place a check mark within the box and Lock the User from any further access to the eRMS system. Click **Save** to commit the action to the database.

2. To Unlock a User, (usually necessary due to a User entering an incorrect password 3 times), click your mouse within the check box beside the word 'Locked'. This will **remove** the check mark within the box and unlock the User and allow access to the eRMS system. Click **Save** to commit the action to the database.

3. A User will have to have received the following messages, upon logging in, for their account to have the check box 'Locked' marked with a check mark. The first message appears after the User's 3$^{rd}$ consecutive attempt with something wrong between the User Name and Password; the 2$^{nd}$ message appears when they subsequently attempt to log in.

4. The screen below shows the location of the 'Locked' check box in the User Maintenance Screen. After either action, click **Close**, **Close** to return to the eRMS Main Menu screen.

---

If this box has a ✓ , the User is Locked and unable to access eRMS.  To unlock, simply click inside this box with your mouse to remove the ✓ .  And Click Save.
To Lock a User (disable their access to eRMS), simply click inside this box with your mouse.  It will insert the ✓ into the box and lock that User's account. Then Click Save. That User will be unable to access eRMS as long as the 'Locked' box is checked.

# Business Rule Options

This option maintains business threshold parameters for a specified facility.

- Maintain and update the time parameters in the **Escalation Wait Time (in days)** box, which notifies and reminds specified users of outstanding tasks.  This feature is for messaging escalation.  When a user fails to act upon a "Review and Respond" message, eRMS escalates the message to the next higher level of management.  The number in the "**Escalation Wait Time**" field determines how long it takes before eRMS escalates the "Failure to Review and Respond" message to the next higher level of management.   For the FMLA Coordinator and the Labor Representative, the next higher level is THEIR Supervisor.  If the Supervisor fails to Review and Respond properly, then the Supervisor's failure is escalated to the Manager level. Detailed explanation of the eRMS Messaging System can be found in Chapter 4.

- Maintain and update the time parameters in the **Number of Unscheduled Absences (in 90 days)** box, which determines when an employee's attendance needs review.  This feature is based upon a 90-day period of time.  The number in the **Number of Unscheduled Absences (in 90 days)**  field is the number of **unscheduled** employee absence **occurrences** (in any given 90-day period of time) for which an "Attendance Review Notification" message is automatically sent to the employee's supervisor (Supervisor, Manager, Sr Manager).  The

supervisor will receive a "Review and Respond" message for **the first violation** of the Number of Unscheduled Absences (in 90 days).  There will be instances where messages **may not** be sent, determinable by the **ACS**.  Detailed explanation of the eRMS Messaging System can be found in Chapter 4.

- Maintain and update the Facility Time Zone.  This is used to populate fields on various forms such as the PS 3971 and is used for all date/time stamps throughout the system.

To access **Business Rule Options**:

Access the **System Administration Window** as described at the beginning of this chapter:

1. Click **Business Rules** button.

2. Use the drop-down list to select the Finance Number for which you wish to set the parameters. Highlight and click the Finance Number you desire.

3. Enter the value for **Escalation Wait Time** (in days).

4. Tab.

5.  Enter the value for **Number of Unscheduled Absences (in 90 days)**.

6.  Tab.

7.  Highlight and click the proper Time Zone.  Note:  Arizona has it's own time listing.

8.  Click **Save**.

9.  Click **Close**.

10. Click **Close** to return to the eRMS Main Menu.

# Temporary Reassignment

Use to temporarily reassign a user's finance number/pay location access to another user. This is extremely useful in 204B assignments.  You no longer will have to remove the pay locations from the permanent user before assigning them to the temporary user.  This will be limited by a date range and the eRMS System will **automatically** complete the initiation and expiration of all reassignments.  During the time frame that the Reassignment is in effect, the permanent user will be reduced to a **read-only** role.  Any User-Generated Messages will continue to go to the permanent user (unless the temporary user is included in the message addressing).  **All System-Generated Messages, including existing ones, will be redirected to the temporary user**.  At the end of the reassignment, all System-Generated Messages **will return** to the permanent user. There is also a manual removal of temporary assignment's option.  **The date range runs from Midnight to Midnight, so for a 1-day reassignment you will need to enter, i.e. 11/07/01 to 11/08/01 to reassign the pay locations for the date of the 7$^{th}$.**

Access **System Administration** as described at the beginning of this chapter:

1.  Click **Temporary Reassignment** button.

2.  Activate the **Reassign from User** drop-down list.

3.  Highlight and click the user whose finance number/pay locations you are temporarily reassigning to someone else.

4.  Activate the **Assign to User** drop-down list.

---

**NOTE:  This list will be limited to ONLY those users with the SAME System Role.**

**There is a Create User option, (explained below) which is the way to assign a 204B or another role. The 204B will not be allowed to log in to eRMS upon the end of the reassignment because they have NO permanent finance number/pay location assignments. (This eliminates the need for phony pay locations in order to maintain your 204Bs in the User Setup System.) If you are assigning an existing Supervisor to the Manager position, you would use Create User option and complete with the existing Supervisor's information. The Supervisor will not be allowed to log in to eRMS as the Manager's User Name upon end of the assignment because they have NO permanent finance number/pay location assignments in THAT role.**

5. If you are reassigning to an existing position, highlight and click that person's name.

6. Enter the date range for the reassignment. **Remember that this is from Midnight to Midnight. So, to reassign for tomorrow's date, you would enter today in the Start Date box and tomorrow in the End Date box. If you enter the same date in both boxes, you will receive the following message.**

7.  Click Reassign.   You will receive a **' Save Successful'** Window.

8.  Click **OK**.

9.  The Temporary Reassignment you just completed will appear in the list box on the bottom of the screen.

Below is the proper way to reassign the FMLA 2 responsibility to the FMLA 3 User **for the date of 11/07/01.**

This is the way the Window will appear when you have successfully completed a reassignment.

10. You may reassign multiple users over multiple time frames at the same time. When you activate the drop-down list, any user who is already involved in a Temporary Reassignment, will NOT appear in the list of available users.

---

**NOTE**: All reassignments that have been entered will appear in the Temporary Reassignments Area of this Window.

---

11. Click **Close** when finished.

**To use a Create User to reassign the finance number/pay location combinations to:**

Access **Temporary Reassignment Window** as described at the beginning of this section:

1. Activate the Reassign from User drop-down list.

2. Highlight and click the user whose finance number/pay locations you are temporarily reassigning to someone else.

3. Click **Create User**.

---

4.  You will be presented with the User Maintenance Screen.  The **Role** will be defaulted to the same role that you are reassigning.

5.  Complete the required information and click **Save**.  You will be returned to the Temporary Reassignment screen and the new user you just created will be defaulted into the "Assign to User" box.

6.  Enter the date range for the reassignment.  **Remember that this is from Midnight to Midnight.  So, to reassign for tomorrow's date, you would enter today in the Start Date box and tomorrow in the End Date box.  If you enter the same date in both boxes, you will receive an error message.**

7.  Click **Reassign**.

8.  Click **OK** to the Save Successful message.  The newly created Temporary Reassignment will appear in the list box.

**If you have made an error OR need to manually cancel a reassignment before it's scheduled end**:

Access **Temporary Reassignment** as described at the beginning of this section:

9. Highlight and click the Assignment you wish to cancel.

10. Click Reinstate Assignment.

11. Click **OK** to the Delete Successful Message.

12. The Temporary Reassignment disappears from the list box and is canceled.

# Message Hierarchy and Role Definition

Use this function to print one of three reports: Message Role Hierarchy, Pay Location/Role Cross Reference, or Unassigned Mandatory Roles.  These reports can be limited by Finance Number, and even further limited to Pay Locations or they can be printed for all finance numbers to which the Administrator has access.

## *Message Role Hierarchy*

This report will tell you, by Finance Number/Pay Location, the message hierarchy.  It will show you the User ID, the User Name, their Message Level and their Role.  The N/A under Message Level means that that individual is not a part of the escalation messaging hierarchy.  The numbers indicate where in the escalation messaging hierarchy that individual is placed.  Detailed explanation of the Message System can be found in Chapter 4.

To run this report:

1.   Access **System Administration Window** as described at the beginning of this section.

2.  Click **Message Hier and Role Defin** button.

3.  Complete the parameters you wish to view, i.e. Finance Number and Pay Locations.

4.  Check the **Message Role Hierarchy** radio button (is the default).

5.  Click **Run**.

6.  Maximize the **print window**.  Below is a sample of the Message Hierarchy and Role Definition Report.  Complete printing instructions can be found on page 6.

# Pay Location/Role Cross Reference

This report will enable the System Administrator to determine the User ID of every user assigned to a particular Finance Number/Pay Location combination.  It will show Login Ids of the occupants of every role (Local Administrator, Senior Manager, Manager, Supervisor, Report Only, Attend. Control Supervisor, Labor Representative, FMLA Coordinator, Human Resources and Site Coordinator) and the vacancies (shown by no name being listed) by the Finance Number/Pay Location combination.

To run this report:

1. Access **System Administration Window** as described at the beginning of this section.

2. Click **Message Hier and Role Defin** button.

3. Complete the parameters you wish to view, i.e. Finance Number and Pay Locations.

4. Check the **Pay Location/Role Cross Reference** radio button.

5. Click **Run**.

Maximize the **print window**.  Below is a sample of the Pay Location/Role Cross Reference Report. Complete printing instructions can be found on page 6.

# *Unassigned Mandatory Roles Report*

This report will enable the System Administrator to determine, by Finance Number/Pay Location, whether any mandatory roles are vacant.

This report will enable the System Administrator to determine whether any eRMS Roles are vacant. It will show the Pay Location, the number of employees in that Pay Location, all of the mandatory roles (Local Administrator, Senior Manager, Manager, Supervisor, Attend. Control Supervisor, Labor Representative, and FMLA Coordinator) and the vacancies (indicated by 3 question marks - ???).

To run this report:

1. Access **System Administration Window** as described at the beginning of this section.

2. Click **Message Hier and Role Defin** button.

3. Complete the parameters you wish to view, i.e. Finance Number and Pay Locations.

4. Check the **Unassigned Mandatory Roles Report** radio button.

5. Click **Run**.

Maximize the **print window**. Below is a sample of the Unassigned Mandatory Roles Report. In this sample, the Finance Number 01-8250's Pay Location of 301 **does not have** a Senior Manager or a Supervisor assigned to it. Complete printing instructions can be found on page 6.

# Chapter 3 - Employee Management

## Overview

Use the Employee Management function to enter employee requested leave, add to or review an individual employee's attendance and administrative action history and generate individual employee reports.

Activate eRMS and Log In as described at the beginning of Chapter 1 – eRMS Main Menu.

At the Main Menu, click Employee Management.  The Employee Management – Leave Entry Window will appear.

# Employee Management – Leave Entry Window

The following information appears on the **Employee Management – Leave Entry** Window.  This information is updated during external downloads.  It is essential for the functionality of eRMS that the sources of this information be accurate.  Work closely with your HR Representatives to ensure the accuracy of all employee information.

*Table 3-1: Employee Management – Leave Entry Window*

| Field | Description |
| --- | --- |
| **Employee ID:** | Social Security Number. |
| **Employee Name:** | Employee name. |
| **Level:** | Current grade level. |
| **Step:** | Current step level. |
| **Type:** | Full time, Part time flexible, part time regular, casual, temporary. |
| **Occupation Title:** | Job Title. |
| **Finance #:** | Current Finance Number. |
| **PayLoc:** | Current Pay Location. |
| **EOD Date:** | Entered on Duty Date. |
| **Home Phone:** | Home Telephone Number. |
| **Emergency:** | Emergency Contact Telephone Number. |
| **PayRoll S/L Bal:** | Amount of sick leave available to the employee according to Pay Roll records. |
| **eRMS S/L YTD:** | Amount of sick leave entered in the eRMS system this Leave Year. |
| **eRMS S/L Bal:** | Amount of sick leave remaining available to the employee in the eRMS system. |
| **PayRoll A/L Bal:** | Amount of annual leave available to the employee according to Pay Roll records. |
| **eRMS A/L Bal:** | Amount of annual leave remaining available to the employee in the eRMS system. |
| **eRMS SLDC YTD:** | Amount of Sick Leave Dependent Care entered in the eRMS system this Leave Year. |
| **eRMS FMLA YTD:** | Amount of FMLA leave entered in the eRMS system this Leave Year. |
| **26PP Work Hrs:** | Amount of work hours in the past 26 pay periods. |
| **Last U/S (Days):** | How many days it has been since the date of the last unscheduled occurrence entered in the eRMS system. |
| **# FMLA on File:** | Number of Active or Pending FMLA Cases on file. |
| **90 Days U/S:** | Number of unscheduled occurrences during the last 90 days. |
| **180 Days U/S:** | Number of unscheduled occurrences during the last 180 days. |
| **365 Days U/S:** | Number of unscheduled occurrences during the last 270 days. |

# Selecting an Employee Name

To perform an employee management task, you must **first** select an **employee name**, then select a **function**.  There are several ways to **find** an employee.  They are described below.

**Note:**  The eRMS database will only present the employees that the user has been assigned responsibility for.  This is determined in the **User Maintenance** or **Temporary Reassignment** of the **eRMS System Administration**.

To select an employee **when you know their social security number**:

Access the eRMS **Employee Management - Leave Entry** Window as described at the beginning of this chapter:

1.  Click **Find** (top button on the right-hand column of buttons).

2.  You will be presented with the **Find Employee Window**.

3.  The cursor will default to the Employee ID field.

4. Type the employee's **Social Security Number**. (you do not need to use the dashes)

5. Click **Find**.

6. The **Employees Matching Your Query** will populate with the employee's information and will be highlighted, as below.

7. Click **Select**. You will be returned to the **Employee Management – Leave Entry Window**. The fields described in Table 3.1 will populate with the information pertaining to the employee selected, as below.

To select an employee **when you know what Subgroup they belong to**:

Access the eRMS **Employee Management - Leave Entry** Window as described at the beginning of this chapter:

1. Click **Find** (top button on the right-hand column of buttons).

2. You will be presented with the **Find Employee Window**.

3. The cursor will default to the Employee ID field.

4. Tab to the **Subgroup** box.

5. Type the Subgroup name or Activate the drop-down list to highlight and click the Subgroup in which you believe the employee to be.

6.  Highlight the Subgroup you desire to search.

7.  Click **Find**.

8. The **Employees Matching your Query** will populate with the employees who have been assigned to the Subgroup.

9. Highlight the employee you want (click the [>] on the left or click anywhere in the line containing that employee).

Click **Select**. You will be returned to the **Employee Management – Leave Entry Window**. The fields described in Table 3.1 will populate with the information pertaining to the employee selected.

To select an employee **when you know a name only**:

Access the eRMS **Employee Management - Leave Entry** Window as described at the beginning of this chapter:

1. Click **Find** (top button on the right-hand column of buttons).

2. You will be presented with the **Find Employee Window**.

3. The cursor will default to the Employee ID field.

4.  Tab to the **Last Name** box.

5.  Type the Last Name you wish to search for.

6.  Tab to the First Name and complete this as well if you know the first name.

7.  Click **Find**.

8. The **Employees Matching your Query** will populate with the employees who have the last name you searched for.

9. Highlight the employee you want (click the [>] on the left or click anywhere in the line containing that employee).

10. Click **Select**. You will be returned to the **Employee Management – Leave Entry Window**. The fields described in Table 3.1 will populate with the information pertaining to the employee selected.

To select an employee **when you know the Finance Number only**:

Access the eRMS **Employee Management - Leave Entry** Window as described at the beginning of this chapter:

1. Click **Find** (top button on the right-hand column of buttons).

2. You will be presented with the **Find Employee Window**.

3. The cursor will default to the Employee ID field.

4. Tab to the **Finance #** box.

5. Type the Finance Number or Activate the drop-down list to highlight and click the Finance Number in which you believe the employee to be.

6. Highlight the Finance Number you desire to search.

7. At this point, the Pay Location field will activate. You may narrow the search to the pay location within the finance number by either typing the pay location number in the box or activating the drop-down list and highlighting and clicking the pay location you desire.

8. Click **Find**.

9. The **Employees Matching your Query** will populate with the employees who have been assigned to the Finance Number.

10. Highlight the employee you want (click the [>] on the left or click anywhere in the line containing that employee).

11. Click **Select**.  You will be returned to the **Employee Management – Leave Entry Window**. The fields described in Table 3.1 will populate with the information pertaining to the employee selected.

Once you have populated the **Employees Matching your Query**, by any of the above ways other than the Employee ID, you may resort the list a number of ways.  The default sort is by Employee ID; your list is sorted by the social security numbers.  You can click the **title bar** of **Last Name, Finance Number or Pay Location** to resort your list.  The list below is resorted by **Last Name**.  If you click the **same** title bar a second time, the sort will reverse (from last to first) by Last Name, Finance Number or Pay Location.

You may complete the **Last Name, First Name, Finance Number and Pay Location** if you wish or any combination of them in order to narrow your search.  The fastest search is going to be by Social Security Number.

> **WARNING**: Do not just click **Find** once you are on the **Find Employee Window**. This will activate a search of **everyone** you have access to. If you have access to multiple finance numbers, this could be a very long search process.

If you enter a search criteria which is not in the database to which you have access, you will receive the following message:

**NOTE:** The Find Button is available from all of the following Windows in eRMS: Employee Reports, Schedules, FMLA Data, Admin Action, PS 3972. It functions the same from wherever it is selected. If you select **Find** from one of the following Windows, when you select your employee, you will return to the Window you came from with that employee's information populated.

# Employee Administration

Use the Employee Administration Window to maintain (i.e., view, create, or delete) employee specific personnel information and work schedules. The default information in the Employee Administration Window is derived from the mainframe legacy systems. Actions performed in the Employee Administration Window are intended to provide immediate access to the employee information. **The information will be overwritten during the next external download with**

**the mainframe systems' information unless you click the Long Term Custom box.  Clicking this box will prevent the overwrite**.

---

**Caution:**  All of the information, except for the telephone numbers, in the Employee Administration Window is populated by the external data downloads.  If you edit an employee in this mode, you must make sure that the Human Resources Department has the same information in their mainframe systems.  Your entries **will be overwritten** during the next external download unless you select the Long Term Custom box.  Adding employees or editing employees in the Employee Administration window is intended to give **immediate** access to the information.  Any information entered through the Employee Administration Window must match exactly the information in the mainframe systems because it will be repopulated with the mainframe systems' information during the next external download unless Long Term Custom is selected.  Work closely with your Human Resources Department in order to minimize any discrepancies between eRMS and the mainframe systems.

---

## Employee Administration Window

The Employee Administration Window is accessible from the **Employee Management - Leave Entry** Window.

---

**Note:**  Only authorized users can add or edit employee information.  Check with your eRMS administrator if you need to make changes to employee personnel information.  **Supervisors can view this information – they cannot make any changes to it.**

---

The following table describes the data fields in the Employee Administration Window.

*Table 3.2: Employee Administration Window*

| Data Field | Description |
| --- | --- |
| **Employee ID:** | Social Security Number. |
| **Employee Status:** | Current status of the employee.  Choices are A for Active, T for Terminated and P for Pending Termination.  **The T & P statuses DO NOT reflect the ELM 365.3 descriptions of the word terminated.  They have absolutely no relationship to the employee's actual separation or termination status within the USPS.** |
| **Last Name:** | Employee last name. |
| **First Name:** | Employee first name. |
| **MI:** | Employee middle initial. |
| **Finance #:** | Current Finance Number. |

| Data Field | Description |
|---|---|
| **Pay Location:** | Current Pay Location. |
| **Occupation Code:** | Current Occupation Code. |
| **EOD Date:** | Date Entered On Duty (EOD). |
| **D/A Code:** | Current DesAct Code. |
| **Employee Type:** | Employee Type (full time, te, casual) dependent upon the D/A Code selected. (non-editable field) |
| **LDC:** | Current LDC (Labor Distribution Code). |
| **Level:** | Current Level. |
| **Step:** | Current Step. |
| **RSC:** | Current RSC (Rate Schedule Code). |
| **RSC Suffix:** | Current RSC (Rate Schedule Code) Suffix. |
| **FMLA Entitlement Hours:** | Current FMLA Entitlement Hours. (non-editable field) |
| **FMLA Entitlement Calc Date:** | Current FMLA Entitlement Calculation Date. (non-editable field) |
| **Home Phone Number:** | Current Home Phone Number. |
| **Other Phone 1:** | Other Phone Number # 1. |
| **Other Phone 2:** | Other Phone Number # 2. |
| **Street:** | Current Street Address. |
| **City:** | Current City. |
| **Personal Emergency Contact:** | Current personal emergency contact name. |
| **State Code:** | Current State abbreviation. |
| **Zipcode:** | Current Zip+4. |
| **Personal Emergency Contact Phone:** | Current personal emergency contact telephone number. |

## *Adding an Employee Administrative Record*

To **Add an Employee**:

Access the **Employee Management - Leave Entry** Window as described at the beginning of this chapter:

1.   At the **Employee Management - Leave Entry** Window, click **Add Emp** button.

2. The **Employee Administration** Window will appear.

1. It will default to a blank screen with the **Employee Status** defaulted to **A (active)** and with the cursor in the **Employee ID** field. Type the Social Security Number in the Employee ID box.

> **WARNING**: You need to be extremely careful that the Social Security Number is typed in properly.  You will **not be able to change** the Social Security Number within the eRMS database.  If any leave, FMLA, Supervisor Comments, Administrative Action has been entered on the employee, **you will not be able to delete the employee** from the eRMS database.  You will only have the option of making the employee status P-Pending Termination or T-Terminated.

2. Tab or hit Enter Key to advance to the Employee Status.  (when adding employee, this will default to A for Active)

3. Tab or hit Enter Key to advance to Last Name. Type in the employee's last name.

4. Continue to Tab or hit Enter Key and enter the information asked for.  The Pay Location field will not become enabled until after the Finance Number has been selected.  For the Finance Number, Pay Location, Occupation Code and D/A Code, there is a drop-down option to select from.

5. **Required fields** before hitting **Save** are: Employee ID, Last Name, First Name, Finance #, Pay Location, Occupation Code, EOD Date, D/A Code. If any of these fields are left blank, when you attempt to Save the changes, you will be prompted by the system to complete them You do not need to enter the LDC, Level, Step or RSC information.  This information will download from the Mainframe.

6. The **Address/Phone** information does not need to be completed in order to save the addition of the employee.  This information will download from the Mainframe.  **However**, it is advised that all of the information be entered at the time that you are adding the new employee to eRMS so that it is immediately available instead of waiting for the next mainframe download.

7. Click **Save**. Click **OK** to Save Successful message.

8. Click **Close**.  You will return to the Employee Management – Leave Entry Window with the information of the new employee populated.  **All Employee Balance** numbers will be 0 until the next mainframe download.  Until that time, the leave entries available for this employee will be extremely limited as there will be no annual or sick leave choices.

## *Editing an Employee Administrative Record*

To **Edit an Employee**:

Access the **Employee Management - Leave Entry** Window as described at the beginning of this chapter.  **Select an employee** as described earlier in this chapter.

1. At the **Employee Management - Leave Entry** Window, click **Edit Emp** button.

2. The **Employee Administration** Window will appear.

3. It will default to the selected employee's information and with the cursor in the **Employee ID** field. The **Employee ID** field is now a **non-editable field**. You can tab or enter to reach the field you need to edit. You may also click the field you need to edit with your mouse. Clicking the field will highlight the current entry in that field, so you can start typing to replace the existing information.

4. Edit the fields in the employee information record. You **must** complete the following fields in order to save the record in eRMS: Employee ID, Last Name, First Name, Finance #, Pay Location, Occupation Code, EOD Date, D/A Code. If any of these fields are left blank, when you attempt to **Save** the changes, you will be prompted by the system to complete them. To move from field to field, use the **Tab** button or **Enter** key.

5. Click **Save** to enter the changes in the eRMS database. Click **OK** to Save Successful message.

6. Click **Close** to return to the Employee Management – Leave Entry Window. The fields will populate with the employee's information.

---

## *Long Term Custom*

Use this check box to **prevent** an overwrite of the information entered during the next Mainframe download. This applies to the **Address/Phone** information **only**. To activate, simply click inside the check box beside "Long Term Custom" with your mouse.

## *Delete Employee Personnel Information*

If any leave, FMLA, Supervisor Comments, Administrative Action has been entered on the employee, **you will not be able to delete the employee** from the eRMS database. You will only have the option of making the employee status for P-Pending Termination or T-Terminated.

If the employee has none of the above entries, you can delete them from the eRMS database.

To **Delete an Employee**:

Access the **Employee Management - Leave Entry** Window as described at the beginning of this chapter. **Select an employee** as described earlier in this chapter.

1. At the **Employee Management - Leave Entry** Window, click **Edit Emp** button.

2. The **Employee Administration** Window will appear.

3. It will default to the selected employee's information with the cursor in the **Employee ID** field. The **Employee ID** field is now a **non-editable field**.

4. Click **Delete**. You will receive the following message to confirm you that really want to delete the employee. Click **OK** to this message. You will receive a 'Delete Successful' message. Click **OK** to that message.

5. Click **Close** to return to the Employee Management – Leave Entry screen. It will present unpopulated.

## *Placing an Employee in Pending Termination or Terminated Status*

This procedure enables you to change an employee's status without removing them from the eRMS database. You will be able to view all leave, FMLA, Supervisor Comments, Administrative Action, Reports on the employee when they are in either one of these statuses. You will **not**, however**, be able to enter leave on an employee in Terminated Status**. You will be able to enter leave on an employee in Pending Termination Status.

To **Terminate or Pending Termination an Employee**:

Access the **Employee Management - Leave Entry** Window as described at the beginning of this chapter. **Select an employee** as described earlier in this chapter.

1.  At the **Employee Management - Leave Entry** Window, click **Edit Emp** button.

2.  The **Employee Administration** Window will appear.

3.  It will default to the selected employee's information with the cursor in the **Employee ID** field. The **Employee ID** field is now a **non-editable field**.

4. Activate the **Employee Status** drop-down list.  Highlight and select either P for Pending Termination or T for Terminated.

5. Click **Save**.  Click **OK** to Save Successful message.

6. Click **Close** to return to the Employee Management – Leave Entry screen.  It will present populated with the same employee's information.


# *Manage Employee Schedules*

Perform the following tasks from the Scheduling Data area in the Employee Administration Window to create or update employee schedules:

- Create, edit or view a base schedule.

- Create, edit or view a current week schedule.

- Create, edit or view the next week schedule.

**Note:**   Any employee with a job bid ID in the mainframe systems that **does not** have a base schedule assigned to it (Casual's, TE's, PTF's, EAS's) will not populate the schedules during the external downloads.  For these employees, you can use the "**Locked**" option described at the end of this section.


### To assign a schedule:

Access the **Employee Management - Leave Entry** Window as described at the beginning of this chapter.  **Select an employee** as described earlier in this chapter.

1. Click **Schedules**.

2. The **Scheduling Window** will appear, populated with the Employee ID, Employee Name, Finance Number and Pay Location of the employee selected.  It will default to the **Base Schedule** which needs to be created.

3. Click **Create**.  The 2$^{nd}$ window below appears, with a blank **Base Schedule** to be completed.

4. **Type** in the appropriate times (you do not need to use the colons, the system will format it for you). **Tab** to maneuver through the boxes. The **Date** box is a non-editable field.

5. Click **Save**. Click **OK** to Save Successful message.

6. Click **Current**. The dates will automatically fill in dependent upon the last mainframe download and current system date.

7. Repeat steps 3 through 5.

8. Click **Next**. The dates will automatically fill in dependent upon the last mainframe download and current system date.

9. Repeat steps 3 through 5.

10. Click **Close** to return to the Employee Management – Leave Entry Window.

11. You may also employ **Find** from this screen directly.  When you have selected an employee, the system will return you to the Scheduling screen, populated with the newly selected employee's information.  If you use **Find** from the Scheduling screen, when you **Close** to return to the Employee Management – Leave Entry Window, it **will not** be the employee you were using in the Scheduling screen; it will revert to the last employee you were using when you were in the Employee Management – Leave Entry Window.

---

**Note:** To alter an employee's *base schedule* for an extended period of time (i.e. a detail assignment), click the **Locked** check box. This prevents the customized base schedule from being lost when eRMS downloads the base scheduled attached to the employee's bid job ID from the external data. **Locked** is not available under the Current Schedule or the Next Week Schedule.

### To edit a schedule:

Access the **Employee Management - Leave Entry** Window as described at the beginning of this chapter. **Select an employee** as described earlier in this chapter.

1. Click **Schedules**.

2. The **Scheduling Window** will appear, populated with the Employee ID, Employee Name, Finance Number and Pay Location of the employee selected. It will default to the **Base Schedule**.

3. If you want to change the employee's **Base Schedule,** type in the appropriate times. **Tab** to maneuver through the boxes. The **Date** box is a non-editable field. **To prevent the new base schedule from being overwritten during the external download process, check the 'Locked' box.**

4. Click **Save**. Click **OK** to Save Successful message.

5. If you want to change the employee's **Current or Next Schedule**, click either one of those buttons and then type in the appropriate times. **Tab** to maneuver through the boxes.

6. Click **Save**. Click **OK** to Save Successful message.

7. Click **Close** to return to the Employee Management – Leave Entry Window.

# Actions

The Actions Modes of eRMS allow:

1. Leave Entry - the abilities to add, edit, view or deny leave and apply Holiday and Scheduled Day Off status to dates.

2. FMLA Entry - the abilities to add, edit or view FMLA Cases as well as Apply and Unapply leave to FMLA Cases.

3. Administrative Action Entry - the ability to add, edit or view Administrative Actions and Grievances.

4. Supervisor Comments Entry - the ability to add or view Supervisor Comments including the ability to make supervisor comments sharable or non-sharable.

5. Set Review Date Entry – the ability to set the employee's next review date in order to track upcoming reviews easier.

6. Tag Employees – the ability to set up Subgroups of employees in order to track them easier and have just the employees in a Subgroup appear on reports.

## *Accessing the Actions*

1. Activate eRMS and Log In as described at the beginning of Chapter 1 – eRMS Main Menu.

2. From the Main Menu, click **Employee Management.**

3. **Find** an employee by one of the methods described beginning on page 75.  This will return you to the Employee Management – Leave Entry Window with the information of the employee chosen.

*Table 3-3: Employee Management – Actions Options*

| Use this option… | on page | To do this… |
|---|---|---|
| **Change View** | **102** | Changes the view from the default 2 month calendar to the 12 month calendar. |
| **Add Leave** | **102** | Enter one or more days of leave. Enter multiple leaves on one or more days. |
| **Edit Leave** | **116** | Edit one or more days of leave. |
| **Summary** | **123** | Review all leave entered on a day. |
| **Deny Leave** | **128** | Deny one or more days of leave. Undeny a denied entry. |
| **Holiday** | **136** | Toggles a day from a Holiday to a Work Day. |
| **SDO** | **137** | Toggles a day from a Scheduled Day Off to a Work Day. |
| **FMLA Data** | **143** | Add, edit, view FMLA Cases. Apply or unapply leave to FMLA Cases. |
| **Admin Action** | **162** | Add, edit, view Administrative Actions and Grievances. |
| **Supv Cmts** | **173** | Add, view Supervisor Comments. |
| **Set Rev Date** | **178** | Set a review date. |
| **Tag Emp** | **179** | Add, edit, view Subgroups of employees. |

# Overview of the Employee Management – Add/Edit Leave Overlay Window

Once an employee has been selected, a calendar day has been chosen and the **Add Leave** button has been clicked, the **Add/Edit Leave Overlay** will appear. Also, the Employee Information will reduce to the "Standard Employee Header" of only the Employee ID, Employee Name, Finance Number and Pay Location.

The table below describes the information on the Employee Management – Leave Entry with the Add/Edit Leave Overlay:

*Table 3-4: Employee Management – Leave Entry with the Add/Edit Leave Overlay Window Contents*

| Field | Description |
|---|---|
| **Employee ID:** | Social Security Number. |
| **Employee Name:** | Employee name. |
| **Finance #:** | Current Finance Number. |
| **PayLoc:** | Current Pay Location. |
| **Legend:** | Color-coded to identify the type of leave (Scheduled, UnScheduled, SDO, Holiday, FMLA, Multi-Leave, Denied) entered for the calendar day. |
| **PayRoll S/L Bal:** | Amount of sick leave available to the employee according to Pay Roll records. |
| **eRMS S/L YTD:** | Amount of sick leave entered in the eRMS system this Leave Year. |
| **eRMS S/L Bal:** | Amount of sick leave remaining available to the employee in the eRMS system. |

| Field | Description |
|---|---|
| **PayRoll A/L Bal:** | Amount of annual leave available to the employee according to Pay Roll records. |
| **eRMS A/L Bal:** | Amount of annual leave remaining available to the employee in the eRMS system. |
| **eRMS SLDC YTD:** | Amount of Sick Leave Dependent Care entered in the eRMS system this Leave Year. |
| **eRMS FMLA YTD:** | Amount of FMLA leave entered in the eRMS system this Leave Year. |
| **26PP Work Hrs:** | Amount of work hours in the past 26 pay periods. |
| **Last U/S (Days):** | How many days it has been since the date of the last unscheduled occurrence entered in the eRMS system. |
| **# FMLA on File:** | Number of Active or Pending FMLA Cases on file. |
| **90 Days U/S:** | Number of unscheduled occurrences during the last 90 days. |
| **180 Days U/S:** | Number of unscheduled occurrences during the last 180 days. |
| **365 Days U/S:** | Number of unscheduled occurrences during the last 270 days. |

The eRMS Employee Balances change as the leave entry process is completed.  The Payroll Balances is updated during the external downloads.

**Note:**    To enter leave for a previous pay period **without** affecting any Payroll balances or generating messages to the Supervisor or FMLA Coordinator simply click a day in a previous pay period. Any leave applied to a previous pay period will automatically be treated as an historical entry and will not generate messages to the Supervisor or FMLA Coordinator. Historical leave entry **will** affect the eRMS Balances of Annual and Sick Leave as well as the U/S counters.

**Employee Management – Leave Entry Window to an unauthorized user**

A user who is **not** authorized to **enter leave** will not have any of the **leave** buttons on the Employee Management – Leave Entry Window.  The user can change views, print a Form 3972 and view the employee's attendance history and Employee Balances information.

## Change View

Click Change View to display a 12-month View Leave Employee Absence Record Window

To enter leave, click **Change View** to return to the Employee Management – Leave Entry Window. **If you click Close from this screen, you will return to the eRMS Main Menu**.

To scroll a year at a time, click the Scroll Bar arrows [>>] or [<<].

## *Add Leave*

Use the Add Leave option to enter leave for a single day or multiple days. If entering leave for multiple days, all leave must be for the same leave type and for the same number of hours for each day.

---

**Note:**    Only authorized users have this capability.  Please check with your eRMS administrator if you need to enter employee leave.

---

Access the Employee Management – Leave Entry Window as described at the beginning of this chapter.  Find an employee as described beginning on page 75.

1.  Click **the appropriate day** of leave on the calendar.  The calendar day changes to dark blue when selected.

2.  Click **Add Leave**.  This button will be disabled **until a day is selected**.

3.  The **Add/Edit Leave Overlay** will appear.  Also, the Employee Information will reduce to the "Standard Employee Header" of Employee ID, Employee Name, Finance Number and Pay Location.

4.  The Leave Date (non-editable) appears as **Leave Date & Through**.  If you are entering a multiple day occurrence, the **Through** date will be the last date of the occurrence.  (More detail on Multiple Day Entry on Page 113.)

---

5.  The default amount of leave is **8** hours, 00 units.  The employee's schedule will default in the **Time & Through** boxes.  Their schedule (non-editable) will appear on the left side of the 4 questions that need to be answered in order to complete the leave entry.  The cursor defaults to the **Hours** box.

6.  The **Hours and Units** can be changed in 2 ways: a) type the new number or b) activate the drop-down list and highlight and click the new number.

7.  The **Time and Through** boxes can be edited to reflect the proper time the employee took off.  The eRMS System will default to taking the leave at the beginning of the shift.  In the sample below, the **hours** were changed to **4**; the system changed the **Time Through** to 18:00, indicating that the employee took the beginning of the shift off.  When entering the times in these two boxes, you do not need to use the colon; the system will format the time for you.

8.  Once you confirm that the **Hours, Units and Time & Through** are proper for the leave being entered, click **Continue**.    This will activate the first question that needs to be asked of the employee.

---

9.  Enter the **employee's response** to the following question by clicking either the **Yes** or **No** radio button beside the question **"Is your absence a result of a job related condition?"**. This will activate the next question.

If the employee answers "Yes", apply your local standard operating procedure for reporting job-related injuries.

---

**Note:** The FMLA statute may also cover an absence due to a job-related condition.

---

10. Enter the **employee's response** to the following question by clicking either the **Yes** or **No** radio button beside the question **"Is this leave FMLA?"**. Further questions may be necessary to determine whether an absence has the potential for protection under the FMLA statute.  It is essential that the Attendance Control Supervisor gather enough information about the absence to meet the statutory obligations defined by the law. This will activate the next question.

11. Click either the **Yes** or **No** radio button beside the question **"Are you (the ACS) requiring documentation for this absence?"**.   This will activate the next question. If the answer is yes, **Doc Req** is typed into the Form 3971 comments field, and the Supervisor's Comments Window displays. Type the nature of documentation requested (i.e. sick leave) and reason for requiring documentation.  The Title of the Supervisor's Comments will default to Reason for document: xx/xx/xxxx (date of the absence) and the Share? will default to Y **if it is the ACS entering the leave**, meaning that others with access to this employee will be able to view this comment. **If the Administrator is entering the leave, the Share? will default to N and must be changed to Y so that others with access to this employee will be able to view the comment.**

> ## Do not enter restricted medical information into the eRMS system.

---

12. Click either the **Yes** or **No** radio button beside the question **"Scheduled?"**. This will activate the leave type box.

13. Activate the drop-down list of Leave Types. The leave types in eRMS are listed by TACS Code order and are limited by the available leave to the employee and the answers to the 4 questions i.e. if the employee has no sick leave balance, there will **not** be any sick leave options in the List of Valid Leave Types. If the employee has an insufficient amount of a leave type, that leave type will **not** appear as an option in the List of Valid Leave Types drop-down list. In the example below, 48 hours of leave was chosen (8 hours a day for 6 days from 11/20 through 11/28). The employee had 40 hours of annual leave in the eRMS balance counter. When the List of Valid Leave Types for this entry populated, it did so **without any annual leave options**. **IF** the employee had only requested 40 hours of leave, the List of Valid Leave Types **would** have included annual leave options. The leave options do not show if the requested amount is greater than the eRMS balance of that leave, either sick or annual.

14. Type any **comments** you may wish to appear on the 3971 in the box as indicated in the picture below.

15. Click **Save**.

16. Click **OK** to Save Successful Message.

17. Click either **Yes** or **No** to "Would you like to print the PS3971?".

18. At any point during the leave entry, **prior to clicking Save**, you may click **Cancel**. You will be prompted "Cancel and lose changes?". You will need to click **Yes** if you really wish to cancel the leave entry.

19. Once all four questions have been answered, you may change any of the entries, i.e. the number of hours or one of the answers. Some changes will **delete the leave type** chosen. This is due to the combination of the leave balances and the answers changing the **valid** leave type options.

**Note**: **Leave is entered on the employee's service day:** According to 432.43 of the Elm, a **service day = a calendar day**, 12:01 a.m. to 12 midnight. **An employee's service day depends on his/her schedule**, as follows: If an employee's work schedule begins at **8:00 p.m. or later**, the employee's **service day is the next calendar day**. This means that all work hours (including any pre-shift work hours) and leave hours are recorded **on the next calendar day (the employee's service day)**. If an employee's work hours **begin prior to 8:00 p.m.** the **service day is the calendar day on which the schedule begins** and all work or leave hours are recorded on that calendar day.

**Scenario 1:** A Tour 1 employee calls in on Friday November 3rd for a scheduled begin tour of 2300. The ACS would click **Saturday November 4th** as the **appropriate** day of leave (**the employee's service day**) on the calendar. The PS Form 3971 will populate correctly to reflect that the employee will not be at work from 2300 Friday until 0730 on Saturday. See the Tour 1 Employee Leave Form 3971 that would result from this scenario on the next page.

**Scenario 2**: A Tour 1 employee completes a 3971 requesting an entire week between his SDOs off. The **appropriate** day to **start** that selection is the day **after** his SDO even though the SDO date is the one the employee listed on the **from date** box on the 3971. Tour 1's **service day** is the next calendar day. In this type of scenario, the employee completes the 3971 requesting **November 13th at 23:00 through November 19th at 07:30**; the **SDO**s are **Monday November 12th and Tuesday November 13th and Monday November 19th and Tuesday November 20th**; the **entry of the leave** would **start** on **Tuesday November 14th** and go through **Sunday November 18th.** The View/Enter Leave Window on the page after next shows that the ACS **clicked** Wed, Thurs, Fri, Sat and Sun for this employee's requested leave. The employee will be off work from 0730 November 11th through 2300 November 20th.

**3971 for Scenario 1 of Tour 1 Leave Descriptions**

Employee called on Friday November 9th, the ACS selected Saturday November 10th as the appropriate day; the 3971 populated correctly with the employee's Tour 1 schedule to indicate that he would not be reporting to work on the night of the 9th.

**Employee Management – Leave Entry w/Add/Edit Leave Overlay for Scenario 2 of Tour 1 Leave Descriptions**

The employee completed a 3971 requesting a week off from the 13th to the 18th; because this is a Tour 1 employee, the appropriate dates to choose are indicated.

## *Enter Leave on Multiple Days*

You can enter leave on multiple, contiguous (in a row) days.

Access the Employee Management – Leave Entry Window as described at the beginning of this chapter.  Find an employee as described beginning on page 75.

1.  Click **the appropriate first day** of leave on the calendar.  The calendar day changes to dark blue when selected.

2.  **Hold the Shift Key down**.

3.  Click **the appropriate last day** of leave on the calendar.  All the days in between the first and the last day turn dark blue to indicate that they have been selected. The days that you select in Multiple Day Entry **must** be **either historical or current.**  You cannot enter both at the same time.

4.  Click **Add Leave**.  The **Add/Edit Leave Overlay** appears.  The only difference between this overlay and the one for a single date entry is the **Leave Date is the 1ˢᵗ day of the leave and the Through is the last day of the leave**.  (below, the 13ᵗʰ through the 16ᵗʰ)

5.  Proceed with **Add Leave** as described above.

## Enter Two Different Leave Types for the Same Day

You can enter more than one leave for a single day:

1.  Click the calendar day to enter an additional leave type.  If you wish to enter an additional leave on a multiple day entry, you will need to hold the **Shift** key when you select the contiguous days.  The **from/through** dates will show all dates that you have chosen.

**Note:** The procedure of adding an additional leave type can be done on a single day entry, on a single day of a multiple day entry or on the entire multiple day entry.

2.  Click **Add Leave**.  You will receive the following message.

3.  Click **OK**.
4.  The **Add/Edit Leave Entry Overlay** will appear.
5.  Proceed with **Adding Leave** as described above.
6.  If either one of the leave types is unscheduled, the date box will color code to red automatically to indicate the unscheduled leave.
7.  The calendar day box will have a small green square in the lower right corner to indicate that there is more than one type of leave entered on the same day.

Note that the week of the 12th through the 16th automatically changed to Red to indicate the unscheduled 0.15 units of late entered and that the green box appeared in the lower right corner to indicate that there is more than one entry on these dates.

## *Edit Leave*

Use the Edit Leave option to edit a prior leave entry for a single day or multiple days. If editing leave for multiple days, all leave must be for the same leave type and for the same number of hours for each day.

**Note:** Only authorized users have this capability. Please check with your eRMS administrator if you need to edit employee leave.

Access the Employee Management – Leave Entry Window as described at the beginning of this chapter. Find an employee as described beginning on page 75.

1. Click **the appropriate day** of leave on the calendar. The calendar day changes to dark blue when selected.

2. Click **Edit Leave**. This button will be disabled **until a day is selected**.

3. The **Leave Summary Overlay** will appear.  Also, the Employee Information will reduce to the "Standard Employee Header" of Employee ID, Employee Name, Finance Number and Pay Location.

4. The **Leave Summary Overlay** will display all leave entries for the date chosen.  To edit a particular leave entry, click the **[>] button** beside the line of leave you wish to edit.

5. Click **Edit Leave**.

6. Continue with leave entry as described above in **Add Leave**.

**To delete a leave entry**:

1. Follow steps 1-5 above.

2. Change the **hours and units** to **0**.

3. Click **Save**. Click OK to Save Successful Message.

## *FMLA Leave Entry*

In order to assist the ACS in determining whether the leave has the potential for protection under the FMLA statute, click the **FMLA Help** button. This will display the conditions and categories that apply to FMLA. Use the information from the employee as to the reason for the absence request and the following FMLA Determination Help Screen to determine possible FMLA coverage for the requested leave. Once that has been completed, click Close.

Further definition of the Categories:

1 = Overnight hospitalization.

2 = Incapacity of more than 3 days and continuing medical treatment (e.g., 2 medical appointments or 1 medical appointment and prescription medication).

3 = Pregnancy.

4 = Chronic conditions causing periodic incapacity.

5 = Permanent or long-term incapacity due to a condition for which treatment may not be effective (e.g., terminal illness).

6 = Condition that will result in incapacity of more than 3 days in the absence of treatment.

1.  If the answer is "yes" to **Is this leave FMLA?**, the Select FMLA Case Window will appear.  If the employee has FMLA Cases on file, the window will appear with all of the **current (pending and approved)** cases listed on the top of the Window.  The information included is the Request Date, Action Date, From and Thru Dates, Status of the Case, Condition and Category. The employee in the window below has 5 approved FMLA Cases on file.  In this case, the defaulted radio button will be on Select an Existing FMLA Case.  If the employee does not have any FMLA on file, the bottom radio button "Request a new FMLA Case" radio button will be the one defaulted.

2. If you are selecting a current FMLA Case, highlight it and click **Save**. Click OK to Save Successful Message.

3. If you are requesting a new FMLA Case, highlight the Condition and, if the Condition is 3 or 4, the Category.

4. Click **Save**. Click **OK** to Save Successful Message to return to the leave entry.

5. If you have requested a new FMLA Case, the radio button for "**Are you requiring documentation for this absence?"** will default to **Yes**.

6. If, from the information provided in this window and the information garnered from the employee during the telephone call, the ACS is still unable to determine which of the existing cases the leave applies to **it is suggested that the ACS select Request a New FMLA Case and DO NOT Specify Condition or Category. It is also suggested that the ACS send a User-Generated Message to the FMLA Coordinator with the information garnered in the phone call.** The selection of Request New FMLA Case will send a message to the FMLA Coordinator assigned to the employee. With the receipt by the FMLA Coordinator of the User Generated Message, they will be able to view individual cases and correct the leave application. Once determined that a new case is not necessary but that the

leave should have been applied to one of the employee's existing FMLA Cases, the FMLA Coordinator can disapprove the case (status 2), and edit the 'new' FMLA Case with comments such as "ACS did not know which case to apply to; created new one when no new condition actually existed."  This scenario will also **unapply** the leave from the wrong 'new' case and allow the FMLA Coordinator to apply the used hours to the correct FMLA Case. Also, the case (because of the disapproved status) will not appear to the ACS to select from in the future, as it was not an appropriate 'new' case. (Applying and Unapplying FMLA Leave will be further explained in the FMLA Data section of this chapter.)

7.  If an employee has insufficient work hours for the last 26 pay periods prior to a request for FMLA leave, the system will generate a message asking if you want to override the hours' requirement.

---

**Note:**    The override function is intended for use when an employee has already met the 1250 work-hour requirement for the same condition in the same leave year and is requesting further FMLA protected leave.

---

8.  If a leave entry will exceed the allowable FMLA usage, the system will generate a message asking if you want to override the hours' limitations.

9.  If an employee has insufficient work hours AND the leave entry will exceed the allowable FMLA usage, the system will generate a message asking if you want to override.

10. eRMS will also populate the field with a date for "Ineligible for FMLA (Estimate Eligibility Date)" on Form 3971, as shown below, based upon the employee's average work hours for the prior 12 weeks.  The population of the field "Ineligible for FMLA (Estimate Eligibility Date)" will occur on **any** leave entry that occurs on an employee with under 1250 work hours in the past 26 pay periods, even if that leave entry is not for FMLA protected leave.

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**Request for or Notification of Absen**

PS Form 3971, April 2001

PS Form 3971, April 2001 (Reverse)

11. You will be presented with a message such as the one below when you **request a new FMLA Case**. The eRMS system will **not** generate a message to the FMLA Coordinator when you select an existing FMLA Case. This will reduce the number of messages that the FMLA Coordinator will receive.

## *Display Leave Summary*

To view the details about a particular date's entry, click the calendar day and then click **Summary**.  If you click one date of an entry that was made using the **shift** key (a contiguous multiple day entry), the begin and end dates will reflect the entire leave entry, not just the date that you clicked.

The **eRMS Leave Summary Overlay** displays, showing you who entered what leave and when it was entered.  The **Leave Summary Overlay** displays the following information:

| Element | Description |
|---|---|
| **Leave Type** | The type of leave entered.  The TACS code precedes the description.  These are listed in the unscheduled leave first, then the scheduled leaves, in order of amount of time i.e. the larger number of hours of each leave is listed first. |

| Hours | The amount of leave entered in Hours and Units. |
|-------|-------------------------------------------------|
| Scheduled | Whether the leave entered was scheduled or not. A ✓ in this box indicates that the leave was scheduled. |
| Begin Date | The begin date of the leave entry. |
| Begin Time | The begin time of the leave entry. |
| End Date | The end date of the leave entry. |
| End Time | The end time of the leave entry. |
| Request Date/Time | The time that the leave entry was entered. |
| Entered By | The User ID of the person who entered the leave. |

From **Leave Summary Overlay**, one has the options to **Add Leave, Edit Leave or Deny Leave**.

Denied leave is shown in red. When a leave entry is denied, the entire entry will appear in red. (Further details about Denied Leave below.)

## *Determination of Sending Successive Messages*

The ACS will now have the power to determine whether or not to send successive messages on unscheduled absences **once the Business Threshold** has been breached. **The initial breach of the Business Threshold Rule will always take precedence over consecutive absences.** This will apply to concurrent days of leave as well as to a second unscheduled absence in the same day.

In the instance below, the first print screen is of the employee's first 3 days of unscheduled leave in the past 90 days. The Attendance Review Message was **automatically** sent in spite of the fact that the days are consecutive in nature (they were entered 1 day at a time). In the second print screen, the employee is calling in for the 4$^{th}$ consecutive unscheduled day off. The system will ask the ACS "**Would you like to generate an Attendance Review Message?"** due to the fact that the employee has prior consecutive days of unscheduled absences and a message has already been generated in regards to this instance of leave. In the third print screen, the employee not only called in sick for the day but also called in late as well. The system will ask the ACS "**Would you like to generate an Attendance Review Message?** due to the second unscheduled absence on the same date.

**NOTE:** Multiple day entries are considered **1 occurrence**. In this example, if the employee had called in on Saturday stating that they would be out until Wednesday, the ACS would have used the Shift key and entered the leave on Sat, Sun, Mon, and Tues at one time. This would only have counted as **1 occurrence** in regards to the **U/S** counters, as well as in regards to the **Absences in 90 days Business Threshold**. No message would have been generated with this type of entry.

## *Deny Leave*

Because it is a process mandate that all 3971s be entered into the system, not just approved 3971s, the ACS, Administrator and SDO will be allowed to indicate that leave has been denied and enter information as to the reason leave was denied.  Leave can be denied in Single-Day or Multi-Day Entry.  Here, the Single-Day process is shown in "In the ACS Role"; the Multi-Day process is shown in "In the SDO Role".

**In the ACS Role:**

1.  Access the **Add Leave** as described at the beginning of this section.

2.  Enter the leave **as requested** by the employee.  Below is a sample where an employee requested the day after the holiday off when they had no annual leave, so they requested LWOP.  Notice that the leave is entered as scheduled because the employee did request it in advance.

3. Click **the same date**.

4. Click **Deny Leave**.  The **Deny Leave Window** appears.

5.  Type a note as to the 'Reason for Denying Leave on xx/xx/xxxx'.  This will appear on the PS3971 (as much as will fit on the line beside "Disapproved (Give Reason):).  It will also appear as a shareable Supervisor's Comment.  The entire comment will appear in the Supervisor's Comment area, so you can type as much as you want to in this note. **Remember** that only a small amount of it will appear on the PS3971.  It is therefore suggested that you type a **one line summary**, hit enter twice (simulating a paragraph) and then type **the full version of the reason for denying the leave**.

6. Click **Save**. Click OK to Save Successful Message.

7. Click **OK** to Print the PS3971. It will default to Disapproved and the **beginning of the** reason you typed in the Reason for Denying Leave box will appear.

8.  The date will change to red for the unscheduled second leave.

9.  The 3972 will **only** show the approved leave.  Denied leave will not appear on a 3972 because no leave was used.

**In the SDO Role:**

The SDO will only be able to deny leave that an ACS has already entered (SDO's cannot enter leave).  This functionality is because the ACS is **recording** the absence; it is still the SDO's role to either **approve or disapprove** the leave request.  For instance, the ACS receives a phone call for an unscheduled 2 day long sick leave request. It is entered into eRMS by the ACS **without documentation required**.  The SDO becomes aware of the absence (and the fact that documentation was not required) when the Leave Usage Log for the day is run.  The employee is on restricted sick leave usage.  The SDO would then **deny** the unscheduled sick leave **with a reason of restricted sick leave**, print the 3971 and give it to the ACS office.  The ACS would also need to be informed that, when the employee arrived to sign the 3971, they would need to **provide documentation for the absence in order to be paid sick leave for the absence.**

1.  Access the employee as described at the beginning of this chapter.

2.  Click **one day of the multiple day entry** you wish to deny. (4th and 5th were entered as 1 multiple day occurrence)

3.  Click **Deny Leave**.

4.  The Deny Leave Window displays.

> **The Begin Date and End Date encompass the
> entire multiple day entry.**

5.

6. Continue with Deny Leave as described above.  **Be Aware – you are denying the entire
   multiple day entry**

## Undeny Leave

If you wish to undeny leave that has been denied, perform the following steps.

1. Access the employee as described at the beginning of this chapter.

2. Click the day with denied leave that you wish to undeny.

3.  Click **Deny Leave**.

**Leave is Denied
because this box is
checked.**

4.  Click **Undo Denial**.

5.  Click **Yes** to Are you sure you want to delete this record question.

6.  Click **OK** to Delete Successful message.

7.  Click **Yes** to Print 3971 question.  3971 returns to it's original information.

**NOTE:**  The original note that was typed for the Denial of the Leave **remains in the Supervisor's
Comments**.  It is **undeletable**.

## *Enter a Scheduled Day Off or Holiday*

Quickly schedule a day off or a holiday for an employee:

1.  Access the Employee Management – Leave Entry Window and select an employee as
    described in the beginning of this chapter.

2.  Click the appropriate calendar day. (turns dark blue)

3.  To schedule a day off (SDO), click **SDO button**.  (turns light blue with SDO)

4.  To schedule a holiday, click **Holiday button**. (turns yellow with HOL)

To clear a day scheduled as a holiday or a day off (SDO):

1.  Click the appropriate day. (turns dark blue)

2.  Click **SDO or Holiday button**. (returns to clear calendar day)

You may enter several, non-contiguous days as Scheduled Days Off in one move:

1.  Hold **Ctrl Key down**.

2.  Click **the 1$^{st}$ day you want to make an SDO**. (turns dark blue)

3.  Click **all other days you want to make SDOs**.  (all turn dark blue) (i.e. all Sat/Sun for 2 months that are presented to you in the Employee Management – Leave Entry Window)

4.  Click **SDO**. (all turn light blue with SDO)


## *Printing Form 3972*

Click **PS3972 button** to generate a report that shows employee absence data for the year you choose.  A sample report can be found below.

1.  Activate the drop-down list and highlight and select the year you wish to print.

2.  Click **Run**.

3.  The PS3972 Print Window appears.

4.  Follow the printing reports instructions on page 6.

## *3971 History Entry*

History entry is intended for use when you need to enter leave from a **prior** pay period.  This form of entry will not affect any of the leave counters or generate any messages due to business threshold limitations being breached or documentation not being on file.  Leave entry is performed as has been described throughout this chapter, in either Single-Day or Multi-Day Entry mode.

In the example that follows, a T/A Reconciliation Report showed that the employee was paid for 24 hours of Sick Leave, from Aug 22nd through Aug 24th but the PS3972 entries showed work hours for those days.  Therefore, after investigation was completed and it was proved that the employee **was** on sick leave for those 3 days, a 3971 History Entry is now necessary in order to reconcile the Time and Attendance System with the 3972.

1.  Access the Employee Management – Leave Entry Window and select an employee as described at the beginning of this chapter.

2.  Click Aug 22nd.

3.  Hold **Shift key down**.

4.   Click Aug 24<sup>th</sup>.

3.   Proceed with **Add Leave** as described earlier in this chapter.

**Note:**   The leave counters for leave balances **do not** change and the Attendance Review Message is **not** generated to the SDO.  The total of unscheduled absences does change to correctly reflect the attendance history of the employee.

See the next 2 Employee Management – Leave Entry Windows as a 3971 History Entry is processed.

**Note:**   Note the eRMS SL Balance and the U/S days in the Employee Balance Counters.

**Note:** There was no change in the eRMS SL balance nor were any messages generated due to the breach of the Business Threshold of 3 absences in any given 90-day period. **However**, the U/S days **did** change to indicate the correct amount of unscheduled occurrences during the time frames listed.

# *FMLA Data*

Use this option to add, edit, view, and print FMLA data for a specific employee. FMLA data includes information about the date, duration, frequency, condition code, category code and disposition of an employee's family and medical leave.

When an employee requests FMLA leave, or an ACS determines from the information garnered during the telephone call that the potential for FMLA protection for this absence exists and designates the leave as FMLA leave, and no corresponding FMLA documentation is on file, eRMS automatically generates a message to the FMLA Coordinator.  When an FMLA Coordinator receives notification that an employee may have a potential FMLA condition, the FMLA Coordinator enters the necessary information to complete the new record created by the ACS. The FMLA Coordinator interacts with the employee to request and obtain the FMLA documentation and determine whether an employee's condition qualifies for FMLA protection.

To access the FMLA Data option:

Access the Employee Management – Leave Entry Window and select an employee as described at the beginning of this chapter.

1. Click the **FMLA Data** button from the Employee Management – Leave Entry Window. The FMLA Window will appear.  Below is an FMLA Window on an employee with NO FMLA Cases on file.  The elements of the FMLA Window are:

| Element | Description |
|---|---|
| **Employee Information** | Standard Employee Header: Employee ID, Employee Name, Finance # and Pay Location. |
| **FMLA List:** | |
| **ID** | Unique eRMS system-assigned ID number.  (sequential numerical numbers assigned when the case is created, either by FMLA Coordinator or ACS) |
| **Action Status** | 1 – Approved; 2 – Disapproved; 3 – Pending. |
| **Condition** | 1 – Birth of Son or Daughter; 2 – Adoption or Foster Care; 3 – Health (Son/Daughter/Spouse/Parent); 4 – Serious Health (Self). |
| **Category** | 1 – Hospital Care; 2 – Absence plus Treatment; 3 – Pregnancy; 4 – Chronic Condition Req. Treatment; 5 – Long-Term Condition Req. Supervision; 6 – Multiple Treatments (Non-Chronic). |
| **Action Date From/Through** | The dates that the FMLA Case is Active or Pending. The date the FMLA leave will begin. |
| **Request Date** | The date of the request for a new FMLA Case, either by the ACS or the FMLA Coordinator. The date a potential FMLA condition is identified. |
| **FMLA Details:** | |

| Local Tracking ID | A local tracking number, can be the number of the Registered Letter Receipt. This field is not required. |
|---|---|
| Re-Certify Date | The date that the FMLA Case needs to be recertified, if it has been determined by the FMLA Coordinator that a recertification is necessary on this particular case. |
| Re-Certify Ind | A check-box indicator of whether or not the FMLA Case needs to be recertified. If checked, recertification is required. |
| Req Finance Nbr | The employee's finance number at the time of the request for a new FMLA Case. |
| Req Pay Location | The employee's pay location at the time of the request for a new FMLA Case. |
| Case Comments | All comments relating to the FMLA Case. When a new Case is created by the ACS Leave Entry action, defaults to NEW FMLA CONDITION. |
| Requested by | The User ID of the creator of the Case, either the ACS or the FMLA Coordinator. |
| Frequency | The expected frequency of absences caused by this FMLA Case. How often employee will need leave, e.g., one time per week. |
| Intermittent | Check-box. Whether the condition may occur irregularly hence requiring leave (e.g., asthma). If checked, the expected leave will be on an intermittent basis. |
| Hard Copy Notes on File | Check-box. The FMLA Coordinator does or does not have a certification on file. If checked, indicates that there are hard copy notes on file. |
| Last Updated by | The User ID of the last person who updated the Case. |
| Duration | The expected duration of the Case OR the currently certified duration of the Case. How long the leave will last, e.g., two days. |
| On Going | Check-box. The FMLA condition has no definitive end (e.g., an asthmatic condition, which requires treatment over an indeterminate period). If checked, the expected leave will be on a continuous basis. |
| Last Updated | The system-generated date that the Case was last updated. |
| Pub71 Date | Date, user-generated, that the Pub 71 was last sent to the employee. Enables the use of a report that indicates when it has been 6 months since the last Pub 71 was sent. The date range for this report is set by the user when requesting the report, which enables the user to request this list **prior** to the actual 6 month date. |
| Number of Leave Instances | The aggregate count of the **instances** applied to this particular Case. Instances are 1 – single day leave entries; 2 – multiple day leave entries; entries of AOT or AHOL. A multiple day entry counts as only 1 instance, regardless of how many days in the entry. |
| Number of Hours | The aggregate count of the **hours** applied to this particular Case. Hours are 1 – single day leave entries; 2 – multiple day leave entries. AOT and AHOL **are not** included in this count. |

| Buttons | |
|---------|---|
| **Find** | Presents the Find Employee Window. |
| **Add FMLA** | Allows the entry of a new FMLA Case. |
| **Edit FMLA** | Allows the entry of the selected FMLA Case. |
| **Print** | Allows the print of the selected FMLA Case. |
| **Print All** | Allows the print of all the FMLA Cases for this employee. |
| **Apply Leave** | Allows the application or de-application of a particular day's leave to an individual FMLA Case. |
| **Close** | Presents the window from where you entered the FMLA Window, either the Employee Management – Leave Entry Window or the Message In-Box. |

# *Add FMLA*

From the above screen, click **Add FMLA**.  The **Add/Edit FMLA Window** will appear as below.  The Request Date (current computer date), the Requested by (current User ID), the Request Finance Number and Request Pay Location will all default, as will the Standard Employee Header.  The cursor will default to the Request Date.  You may change all of these defaults except for the Requested by field.  The Request Finance Number and Pay Locations refer to the employee at the time the request is made.

1.  The Local Tracking ID **need not** be completed.  It's intended use is to place the Registered Letter Number from the letter sent to the employee in regards to this claim.

2. **Action Status** is **required**.  Activate the drop-down list.  Highlight and click the Action

Status you wish to assign this case.  Click **OK**.                                         You
may also type the number (1,2,3) into the field and enter or tab to the next field.

3. **Condition** is **required**.  Activate the drop-down list and highlight and click the condition that

applies to this case.  Click **OK**.                                         You may also type
the number (1,2,3,4) into the field and enter or tab to the next field.

4. If you choose Condition 3 or 4, the **Category** field becomes enabled. Activate the drop-down
list and highlight and click the category that applies to this case.  Click **OK**.

You may also type the number (1,2,3,4,5,6) into the field and enter or tab to the next field.

5.  Complete the rest of the fields. If you use 3-Pending as the Action Status, the Action Date From/Through will default to the current computer system date as From and that date + 15 days for the Through date.  Even though it defaults, you may still change it.  If you make the Action Status 2-Disapproved, the ACS who entered the leave will receive a message to change the leave type to a non-FMLA leave.  This is further explained in the Message Chapter 4.

6.  Click **Save**.

7.  Click **OK** to Save Successful Message.

8.  The Case will update the ID, Last Updated By and Last Updated fields upon the successful Save as shown below.

9.   Click **Close** to return to the FMLA Window.  It will now appear as below.

10. Click **Close** to return to the Employee Management – Leave Entry Window, which will now appear as below.  The # FMLA on File now shows **1** and the FMLA at the bottom of the window shows the specifics of the case just entered by the FMLA Coordinator.

11. When the FMLA Coordinator logs in to the eRMS System, they may receive messages that the ACS has created new FMLA Cases.  The Message In-Box will appear as below.

12. The FMLA Coordinator would click the [>] button beside the message that he/she desires to Review and Respond to.  This action would open the window below with the following defaulted information: Employee Standard Header, ID (same as the one in the message), Requested by (ACS User ID), Last Updated (date of request for the leave), Last Updated by (ACS User ID), Request Finance Number, Request Pay Location, Number of Leave Instances, Number of Hours, Action Status (defaults to 3-Pending), Condition (and Category if appropriate).  The Case Comments default to "NEW FMLA CONDITION".  The Action Date – From/Through defaults to the date the message was generated for From and that date + 15 days for the Through (this is the standard 15 day pending period for documentation).  The Condition (and Category if appropriate) are based upon the choice(s) made by the ACS during the telephone call with the employee requesting the absence.  The Number of Leave Instances and Number of Hours indicates that the ACS entered one instance of x number of hours, in the example below, 5.15 hours.  These hours are automatically attributed to this FMLA Case.

13. The FMLA Coordinator would complete the rest of the fields on this screen as dictated by the circumstances of the Case.

14. Click **Save**. Click OK to Save Successful Message.

---

15. Click **Close** to return to the Message In-Box Screen.

## *Edit FMLA*

Access the FMLA Window as described at the beginning of this section.

Click **Edit FMLA** from the Employee Management – Leave Entry Window.

1. The FMLA Window appears:

2. Click **Edit FMLA**.

3. The **Add/Edit FMLA** Window appears.  Edit the file as necessary. If you use 3-Pending as the Action Status, the Action Date From/Through will default to the current computer system date as From and that date + 15 days for the Through date.  Even though it defaults, you may still change it.  If you make the Action Status 2-Disapproved, the ACS who entered the leave will receive a message to change the leave type to a non-FMLA leave.  This is further explained in the Message Chapter 4.

4. Click **Save**. Click OK to Save Successful Message.

5. Click **Close** to return to the Employee Management – Leave Entry Window.

## *Apply Leave*

There are going to be occasions when an ACS creates a new FMLA Case when it is not necessary. This is how the FMLA Coordinator assures that the leave is correctly applied to the FMLA Cases on file as well as removes the incorrectly created case. **Note:** These steps probably will be done, more often than not, from the Message In-Box when the FMLA Coordinator Reviews & Responds to the message created by the incorrectly created case and not from accessing it this way.

Access the FMLA Window employee as described above.

In this case, the ACS initially created an FMLA entry for condition 3, category 1 due to telephone call of employee (the second print). The following day, the ACS created **another** FMLA case for the proper "Birth of Child" condition 1(the first print). The FMLA Coordinator had already started the process for the first claim when the message for the second one was received.

**It is extremely important that this procedure is followed step by step when disapproving an <u>incorrectly created</u> case. This set of steps prevents the ACS who entered the leave on the incorrect case from receiving a message to change it to a non-FMLA leave type. (This is explained in detail in the Message Chapter 4.)**

This is how the FMLA Coordinator can correct this problem and **correctly apply** the leave.

1.  Select the **correct case**.

2.  Edit the case. **This will include, but may not be limited to, changing the From Date (to include the initial day of absence applied to the wrong case) and editing the Case Comments**. The Comments should include some reference to the incorrect case, the change in the application of leave and the disapprovement of the incorrect case.

3.  Click **Save**. Click OK to Save Successful Message.

4. Click **Close**. This will return you to the FMLA Screen as it appears in the 2nd print above.

5. Choose **the incorrect case**. Click the [>] beside it.

6. Click **Apply Leave** button.

7. The **Apply Leave Screen** appears as below.

8. The leave that was entered on 11/09/2001 needs to be applied to the **correct 'Birth'** case.

9. Highlight and click the line of leave listed in 'Applied Leave' column.

10. Click **<<UnApply>>.**

11. The line now appears in the 'Unapplied Leave' column. The **FMLA Case Balances** now shows 0/0 in the Applied and 1/8 in the Applied. (The Leave: line infers instances.) The 11/9 leave is now available to be applied to the correct case.

12. Click **Edit FMLA**.

13. Change the **Status** to **2 – Disapproved**. Enter **Case Comments** as to the reason for this
    action, i.e. ACS made 2 cases during 2 different telephone calls; transferring all leave to the
    other case made. As you can see from the print below, the **Number of Leave Instances
    and Number of Hours** are both 0 since you have already unapplied the leave.

14. Click **Save**. Click OK to Save Successful Message.

15. Click **Close**. This will return you to the main FMLA Screen.

16. Click the [>] beside the **correct case**.

17. The **Apply Leave** window appears with leave under both Unapplied and Applied.

18. This time, highlight and click the line under Unapplied leave, click **Apply**. (this will now apply all of the FMLA leave to the correct case)

19. Click **Close** to return to the Message In-Box or the Employee Management – Leave Entry screen.

---

**REMINDER: It is extremely important that this procedure is followed step by step when disapproving an <u>incorrectly created</u> case. This set of steps prevents the ACS who entered the leave on the incorrect case from receiving a message to change it to a non-FMLA leave type. (This is explained in detail in the Message Chapter 4.)**

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NOTE:  The steps of highlighting a leave entry and clicking either >>Apply>> or <<UnApply<< can also be used if leave gets incorrectly applied to the wrong case on an employee who has more than one active case.  In these instances, all you need to do is select the incorrect case, Unapply the leave, select the correct case and Apply the leave.

## *Printing FMLA Cases*

From any of the FMLA Windows that have a Print or a Print All button, you can print the individual, currently highlighted or open, FMLA Case or you can print all of the FMLA Cases on file for the employee.  Click either button and follow the steps for printing given on page 6.

# Administrative Action

Use this option to view or document administrative actions regarding a specific employee.

To access Admin Action option:

1. Access Employee Management – Leave Entry Window and select an employee as described earlier.

2. Click **Admin Action**.

3. The **Administrative Action** Window displays.

4. The elements of the Administrative Action Window are:

| Element | Description |
|---|---|
| **Employee Information** | Standard Employee Header: Employee ID, Employee Name, Finance # and Pay Location. |
| **Administrative Action List:** | |
| **Tracking No** | Unique eRMS system-assigned ID number.  (sequential numerical numbers assigned when the action is created) |
| **Occur Date** | Date of Occurrence that generated the Administrative Action. |
| **Nature of Action** | Title of the Nature of Action as completed by the Supervisor, Labor or Administrator creating the action. |
| **Action Date** | Date the action was created. |
| **Action Description** | Title of the Action Description as completed by the Supervisor, Labor or Administrator creating the action. |
| **Retain Date** | Date of retention for the action; defaults to the action date + 2 years. |
| **Administrative Action Comments** | |
| **Last Updated By** | User ID of the last person who updated the action. |
| **Supervisor Comments** | The comments typed by the Supervisor, Labor or Administrator when creating or editing the action. |
| **Last Updated By** | User ID of the last Labor Rep who updated the action. |
| **Labor Comments** | Labor Rep's comments when commenting on the Administrative Action. |
| **Labor Concur** | Check-box.  The Labor Rep concurs or not with the Supervisor's Action.  If checked, the Labor Rep concurs. |
| **Grievance** | Check-box.  Whether or not there is grievance information attached to the Administrative Action.  If checked, there is grievance information. |
| **Buttons** | |
| **Find** | Presents the Find Employee Window. |

| Add Admin | Allows the entry of a new Administrative Action. |
| --- | --- |
| Edit Admin | Allows the entry of the selected Administrative Action. |
| Print | Allows the print of the selected Administrative Action. |
| Print All | Allows the print of all the Administrative Actions for this employee. |
| Grievance | Presents the Grievance Window. |
| Close | Presents the window from where you entered the Administrative Action Window, either the Employee Management – Leave Entry Window or the Message In-Box. |

## Add Administrative Action via Response to Message

To **add** an administrative action record in response to a message:

5. Click **Rev & Respond** at the Message In-Box. (more detailed information in chapter 4) This will display the Administrative Action Window, with the defaulted information as below.

6.  Complete the **Action Description and Supervisor Comments**.

7.  Click **Save**. Click OK to Save Successful Message. This action sends a message to the Labor Representative for their review.  It also adds the Tracking Number to the Administrative Action.

8.  Click **Close**.  This returns you to your Message In-Box.

9.  When the Labor Rep logs in, a message awaits in regards to the above Administrative Action. The Labor Rep clicks **Rev & Respond** and receives the above Window.

10. The Labor Rep completes the Labor Comments and clicks within the **Labor Concur** check-box if they do.  (further information in the Message Chapter)

11. Click **Save**. Click OK to Save Successful Message.

12. This sends a message back to the Supervisor (more detail in Message Chapter).  It also completes this Administrative Action.

13. The **Administrative Action** now appears as such:

## Add Administrative Action

To **add** an administrative action record not in response to a message:

1. Access the Administrative Action as described at the beginning of this section.

2. Click **Add Admin**.

3. Complete fields as desired.

Click **Save**. Click OK to Save Successful Message. This type of Administrative Action does not get sent to Labor for concurrence; only those Administrative Actions completed as the result of a message response are sent to Labor.

## Edit Administrative Action

To **update** an administrative action record:

4. Access the Administrative Action as described at the beginning of this section.

5. Click **Edit Admin**.

6. Edit fields as desired.

7. Click **Save**. Click OK to Save Successful Message.

## Printing Administrative Action

From any of the Administrative Action Windows that have a Print or a Print All button, you can print the individual, currently highlighted or open, Administrative Action or you can print all of the Administrative Actions on file for the employee. Click either button and follow the steps for printing given on page 6.

## Grievance Window

This is where you can maintain Grievance Information associated with any Administrative Action on any Employee.

Access the Administrative Action Window as described at the beginning of this section.

1. Click **Grievance** button.

2. The Grievance Window displays.

| Element | Description |
|---|---|
| **Employee Information** | Standard Employee Header: Employee ID, Employee Name, Finance # and Pay Location. |
| **Action Information** | |
| **Nature of Action** | Defaults to the Nature of Action of the Administrative Action to which this Grievance is related. |
| **Action Description** | Defaults to the Action Description of the Administrative Action to which this Grievance is related. |
| **Original Retain Date** | Defaults to the Retain Date of the Administrative Action to which this Grievance is related. |
| **Action Date** | Defaults to the Action Date of the Administrative Action to which this Grievance is related. |

| Grievances Information | |
|---|---|
| **Step 1** | User ID of the last person who updated the action. |
| **Date** | The Date of the Step 1 Meeting. |
| **Union Rep** | The name of the Union Representative during Step 1. |
| **Supervisor** | The name of the Supervisor of the Employee. |
| **Designee** | The name of the person to whom the Step 1 was presented. (could be the same as Supervisor) |
| **Decision and Narrative** | The decision and narrative of Step 1. |
| **Step 2** | |
| **Date** | The Date of the Step 2 Meeting. |
| **Union Rep** | The name of the Union Representative during Step 2. |
| **Designee** | The name of Management's designee at Step 2. |
| **Decision and Narrative** | The decision and narrative of Step 2. |
| **Step 3** | |
| **Date** | The Date of the Step 3 Meeting. |
| **Union Rep** | The name of the Union Representative during Step 3. |
| **Designee** | The name of Management's designee at Step 3. |
| **Decision and Narrative** | The decision and narrative of Step 3. |
| **Final Settlement Decision and Narrative** | The decision and narrative of the Final Settlement. |
| **Final Action** | The Nature of the Final Action. |
| **Final Retain Date** | The Final Retain Date of the Action. |

8. All of the fields for the various Steps of the Grievance Procedure are editable. The Labor Representative, or other designee, should update all Grievance information.

9.  After completion of Grievance Data, click **Save**. Click OK to Save Successful Message.

10. Click **Close** to return to the Administrative Action Window.

11. The Grievance Data field of the Administrative Action Window will now populate with ✓ to indicate the presence of Grievance Data on this particular Administrative Action.

**Note:** To maintain accurate information, the labor representative or the supervisor must update the administrative action and Grievance Data information during the process.

# Supervisor Comments

Use this option to document and review attendance related actions; e.g. review of attendance, commendations, restricted sick leave, etc.

**Note**: Employees with FMLA protected leave **must** be eligible for perfect attendance awards, if they were eligible prior to the FMLA absence.  However, an employee may not be eligible for a "no sick leave usage" award, if the employee chose the use of SL for the FMLA protected leave, which would disqualify the employee.

To access Supervisor Comments:

Access Employee Management – Leave Entry Window and select an employee as described at the beginning of this chapter.

1.   Click **Supv Cmts**. The Supervisor Comments Window appears.

| Element | Description |
|---|---|
| Employee Information | Standard Employee Header: Employee ID, Employee Name, Finance # and Pay Location. |
| Date Created | The Date the Supervisor Comment was Created. |
| Title | The Title of the Supervisor Comment.<br>Defaults to Reason for Document: xx/xx/xxxx for requiring document during leave entry. |
| Share? | This indicates whether the Supervisor Comment is shareable or not. If **Y**, then any user with access to the employee is able to view the comment. If **N**, then **only** the user who created the comment may view it. |
| Created by User | User ID who created the comment. |
| Created by Role | The Role of the user who created the comment. |
| Last Update Date | The last date that the comment was updated. |

## Add Comment

Generate a new Supervisor note. The currently logged in user is assigned as the creator of the note.

**Note:** The information you write using the Add option may be seen by others with access. Care should be taken to exercise appropriate discretion in writing your notes. You are responsible for insuring that all information entered in the Supervisor Comments is professional and appropriate in style and content. **Article 16.2 discussions may NOT be recorded in this section.**

1. Click **Add.** The Supervisor Comments Screen appears.

2. Everything but the **Title** of the Supervisor's Comment will default to system-generated information. **The Share? defaults to N when creating a new Supervisor Comment**.

3. Type a title for the comment.

4. If you wish to **share this comment** with other users who have access to this employee, **Tab** to the **Share?** column and type **Y**.

5. Tab to the Comments: section and begin typing.

6. When finished, click **Save**. Click OK to Save Successful Message.

7. The same employee as viewed by another user. The Supervisor Comment that was made Non-Shareable is not visible to any one other than the user who created it.

## *Deleting Supervisor Comments*

A Supervisor Comment can only be deleted by the user who created it.

1. Click [>] beside the comment you wish to delete.

2. Click **Delete**.  Click **Yes** to                                                                 .

3. Click **OK** to "Delete Successful" message.

4. Click **Close** to return to the Employee Management – Leave Entry Window.

5. Below is the message you will receive if you attempt to delete a comment created by another user.

## *Set Review Date*

Use this functionality in order to set a next review date on employees. You will be able to run a report (explained in the Reports Chapter) to determine what employees are due for upcoming reviews.

Access Employee Management – Leave Entry Window and select an employee as described at the beginning of this chapter.

1. Click **Set Rev Date**.

2. The Set Review Date Window appears.

3.  Type in the **date** of the employee's next review.

4.  Click **Save**. Click **OK** to Save Successful Message.

5.  Click **Close** to return to the Employee Management – Leave Entry Window.

6.  The **Clear** button will clear out the date if one exists.

## *Employee Subgroups (program says Tag Group)*

This functionality allows a user to identify a specific group of employees upon which reports can be run. This enables a user to track certain individuals within their finance number/pay locations combinations without having to print out the reports for entire finance numbers or multiple pay locations. Subgroups **are specific to user**; therefore, you will only see the list of your own Subgroups when employing this functionality. You may create an unlimited number of Subgroups. An employee may belong to an unlimited number of Subgroups.

Access Employee Management – Leave Entry Window and select an employee as described at the beginning of this chapter.

1. Click **Tag Emp** button.

2. The Tag Employee Window appears.

## *Creating a Subgroup*

Before you can Tag Employees, you must have Subgroups created.

1. From the above window, click **Create Tag**.

2. The User Subgroup Maintenance Window appears.  If Subgroups exist, their name and the number of employees already assigned to each group will appear in the list.

3.  Click **Add Group**.  The bottom line will highlight.

4.  Type a **Subgroup Name**.

5.  Click **Save**.  Click **OK** to Save Successful Message.

6.  Click **Close** to return to Tag Employee Window.

7. The newly created Subgroup appears, alphabetically, in the list above.

## *Adding Employees to Subgroups*

**To Add Employees to Subgroups:**

1. Highlight and click a list in the **Employee is NOT in these Subgroups** box.

2. Click **>>Add>>** button.

3. The name of the Subgroup now appears in the **Employee IS in these Subgroups** box.

## *Removing Employees from Subgroups*

**To Remove Employees from Subgroups:**

1. Highlight and click a list in the **Employee IS in these Subgroups** box.

2. Click **<<Remove<<** button.

3. The name of the Subgroup now appears in the **Employee is NOT in these Subgroups** box.

4. Click **Close** to return to the Employee Management – Leave Entry Window.

# Reports

The Reports Modes of eRMS allow:

1. Individual Employee Reports.

2. Multiple Employee Reports, by Finance Number and/or Pay Location combinations or by Subgroups.

## *Common Report Information*

1. **Parameters Window**: Allows you to restrict the type or amount of information. The Date Range Through Parameter will default to the current system date.

2. **Run Button**: Produces the report after the parameters have been completed.

3. **Clear Button**: Clears the previously entered parameters.

4. **Close Button**: Returns you to the window you entered Reports from, either the Main Menu or the Employee Management – Leave Entry.

5. **Print**: Allows the physical print of the report. (complete instructions for printing on page 6)

6. **Header**: All reports will tell you the name of the report, the report number, the 'current as of' information, the date the report was run, and your selection criteria.

7. **Format**: Reports will be in finance number then pay location order. They will be alphabetized within that order, i.e. the pay location 100 will be alphabetical; then pay location 200 will be alphabetical, etc. **Reports will include only the employees' last 4 of their social security number**.

8. **For Multiple Employee Reports:** Choice of **Finance Number**; **Pay Location Range** or **Subgroup** in order to restrict report.

9. **Date Range**: You do not need to insert the slashes (/) for the dates, i.e. for January 1$^{st}$, 2001, you can type 010101. The system will format the date.

## *Accessing Reports*

1. Click **Reports** from the Main Menu. **OR**

2. Click **Employee Management.**

3. **Find** an employee by one of the methods described beginning on page 75. This will return you to the Employee Management – Leave Entry Window with the information of the employee chosen.

4. Click **Emp Reports**.

5. The Reports Sub Menu Window appears.

If you access this Window from the Main Menu, and wish to print a Single Employee Group report, you will need to Find an employee, prior to running the report, as described on page 75 before proceeding with the reports.  You may use the Find option prior to choosing a report or from the Parameter Window of the individual report.

## *Individual Employee Reports (Single Employee Group Reports)*

The Reports under this heading, **Single Employee Group Reports**, return information on the selected employee only.

| Button | Description |
|---|---|
| Employee Leave | Employee Leave Daily Numbers Reports, Employee Leave Averages Reports, Employee Leave Averages Graph.  There are many different parameters available for these reports. |
| PS3972 | All leave recorded within the system for the leave year selected. |
| PS3973 | All military leave recorded within the system for the fiscal year selected. |
| Employee Key Indicators | Key information regarding leave history; information such as sick and annual leave balances, unscheduled leaves and lates and administration action summary. |
| T&A Reconciliation | Lists the discrepancies between eRMS entries and T&A Data. |
| Payroll Reconciliation | Lists the discrepancies between eRMS entries and Payroll Data. |
| Hours Use | Summary of hours used. |
| Hours Use Analysis | Summary of hours used showing each leave category and the categories percentage as compared to work hours. |

## *Parameters and Parameters by Report Button*

On the following pages, you will find a brief description of the reports.  You will also find a brief description of the parameters and Parameters available for each report.  There is a brief description of the result within the report based upon which parameters and/or Parameters are chosen.  There is also a print screen of the Parameter Window for each report.

## *Employee Leave*

Daily Number or Average of particular leaves used by a date range.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Date Range** | **From/Through** | Defaults through to current system date. | Restricts the date range of the report. |
| **Leave:** | **Class: Category:** | Leave Category Combo Annual/FMLA/LWOP/Sick Leave | Restricts report to instances of the particular category of leave chosen. |
| | | Hour Codes All general Hour Code categories, i.e. Part Day LWOP, Annual, Sick, Full Day LWOP | Restricts report to instances of the generalized hour code category of leave chosen. |
| | | Hour/Reason Codes All specific Hour Code categories, i.e. Part Day LWOP – Proferred, Part Day LWOP – Maternity; Part Day LWOP – Personal | Restricts report to instances of only the specific hour code category of leave chosen. |
| | | 3972 Summary All 3972 abbreviations of leave, i.e. fSL, SWOP, ADL | Restricts report to instances of only the specific 3972 abbreviation category of leave chosen. |
| **Report Type** | **Daily Numbers** | Default choice. | Actual daily numbers, by date, of leave parameters chosen. |
| | **Averages** | | Average of the leave parameters chosen and percentage as opposed to work hours. |

## *PS3972*

Absence Analysis by Leave Year.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Leave Year** | | Defaults to current leave year. Available years are 2 years prior to current leave year and 2 years after leave year. | Restricts the Absence Analysis Report to the Leave Year chosen. |

## *PS3973*

Military Leave Control Report by Fiscal Year.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Fiscal Year** | | Defaults to current fiscal year. Available years are 2 years prior to current fiscal year and 2 years after fiscal year. | Restricts the Military Leave Control Report to the Fiscal Year chosen. |

## *Employee Key Indicators*

Lists key information regarding the employee's leave history.  Information such as sick leave balance and YTD usage, annual leave balance and YTD usage, unscheduled leaves by date and type, unscheduled lates by date and administration action summary by date will be displayed on the report.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Date Range** | **From/Through** | Defaults through to current system date. | Restricts the date range of the report. |

## *T&A Reconciliation*

Lists the discrepancies between eRMS entries and T&A data by date.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Calendar Year/Pay Period Range** | **Calendar Year** | Defaults to current calendar year. Available years are 2 years prior and 2 years future. | Restricts the year of the report. |
| **Pay Period Range** | **From/Through** | Any pay period for the Calendar Year chosen. | Restricts the range of the report to just the pay period (s) chosen. |

## *Payroll Reconciliation*

Lists the discrepancies between eRMS entries and Payroll data by date.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Calendar Year/Pay Period Range** | **Calendar Year** | Defaults through to current calendar year.<br>Available years are 2 years prior and 2 years future. | Restricts the year of the report. |
| **Pay Period Range** | **From/Through** | Any pay period for the Calendar Year chosen. | Restricts the range of the report to just the pay period (s) chosen. |

# *Hours Use*

Lists hours usage by day or in summary for the date range.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Date Range** | **From/Through** | Defaults through to current system date. | Restricts the date range of the report. |
| **Report Type** | **Day** | Default selection | Gives a daily listing of the hours' usage. |
| | **Summary** | | Gives a summary of the hours' usage over the date range. |

## *Hours Use Analysis*

Summarizes the hours used for a range of days.  Shows each leave category and the categories percentage as compared to work hours.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Date Range** | **From/Through** | Defaults through to current system date. | Restricts the date range of the report. |

## *Multiple Employee Reports (Multiple Employee Group Reports)*

The Reports under this heading, **Multiple Employee Group Reports**, return information on all employees within the finance number/pay location or subgroup parameters selected.

| Button | Description |
|---|---|
| Employee Leave | Employee Leave Daily Numbers Reports, Employee Leave Aggregate Report, Employee Leave Analysis Report, Employee Leave Averages Reports, Employee Leave Averages Graph. There are many different parameters available for these reports. |
| Sick/FMLA Leave Usage | Lists the various types of sick leave and FMLA leave used in specified timeframe |
| Unscheduled Occurrences | Lists employees whose number of unscheduled leave occurrences for a date range equal or exceed a user-supplied number. |
| Leave Summary by Day | Summarizes hours by day for each leave category associated with the user selected leave class. |
| % Leave Requiring Doc | Identifies the percentage of leave requests that required documentation. |
| Leave Usage Log | Lists employees who have called in and requested leave. Aggregate count of the number of requests for leave for a given day. |
| Ready for Review | Lists employees ready for review for a given date range. |
| PS3971 | Allows the print of all 3971's for a given date range. |
| FMLA Eligibility | Lists employees and their FMLA eligibility information; can be run for those who may be eligible, may not be eligible, have high usage of FMLA or all employees. |
| FMLA Reports | Recertification Approaching, Pending Documentation and Publication 71 Six Month Reports. |
| T&A Reconciliation | Lists discrepancies between eRMS and T&A Data. |
| Payroll Reconciliation | Lists discrepancies between eRMS and Payroll Data. |
| Messages | Message List Report and the Message Count Report. |
| Message Hier & Role Defin | Message Hierarchy and Role Definition Report; Pay Location/Role Cross-Reference Report; Unassigned Mandatory Roles Report. |
| Schedules | Current or Next Week Schedules for a group of employees. |
| Hours Use Analysis | Summary of hours used showing each leave category and the categories percentage as compared to work hours. |

## *Common Parameter Choices for Multiple Employee Reports*



All of the multiple employee reports will have the above Parameter choices.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Finance #:** | | Individual Finance Numbers to which the user has access. | Restricts the report to a particular finance number. **If left blank, report will include all finance numbers user has access to**. |
| **Pay Location:** | **From/Through** | Pay Locations within the Finance Number | Restricts report to instances of the particular category of leave chosen. |
| **Subgroup:** | | Hour Codes<br>All general Hour Code categories, i.e. Part Day LWOP, Annual, Sick, Full Day LWOP | Restricts report to instances of the generalized hour code category of leave chosen. |

**NOTE**: If you choose to run a report using a Subgroup as the beginning parameter, you will not be able to include a finance number or pay location parameter. The finance number and Subgroup parameters are mutually exclusive of each other – you can pick one or the other but not both.

# *Employee Leave*

Daily Number, Aggregate, Analysis, Averages of particular leaves used by a date range.  Also includes the Denied Leave Report (only report which includes denied leave).

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Date Range** | **From/Through** | Defaults through to current system date. | Restricts the date range of the report. |
| **Leave:** | **Class:** **Category:** | Leave Category Combo Annual/FMLA/LWOP/Sick Leave | Restricts report to instances of the particular category of leave chosen. |
| | | Hour Codes All general Hour Code categories, i.e. Part Day LWOP, Annual, Sick, Full Day LWOP | Restricts report to instances of the generalized hour code category of leave chosen. |
| | | Hour/Reason Codes All specific Hour Code categories, i.e. Part Day LWOP – Proferred, Part Day LWOP – Maternity; Part Day LWOP – Personal | Restricts report to instances of only the specific hour code category of leave chosen. |
| | | 3972 Summary All 3972 abbreviations of leave, i.e. fSL, SWOP, ADL | Restricts report to instances of only the specific 3972 abbreviation category of leave chosen. |
| **Employee Type** | **Type** | Casual, FTR, PTF, PTR, Relief, TE, Temp | Restricts report to the employee type chosen.  Leave blank to report on all employees within the other parameters. |
| **Report Type** | **Daily Numbers** | Default choice. | Actual daily numbers, by date, by employee, of leave parameters chosen. |
| | **Aggregate** | | Aggregate total, by date, by employee, of leave parameters chosen. |
| | **Analysis** | | Aggregate total, by date, of leave parameters chosen. |
| | **Averages** | | Average of the leave parameters chosen and percentage as opposed to work hours. |
| | **Denied Leave** | **Only Report which includes Denied Leave.** | Actual daily numbers, by date, by employee, of leave parameters chosen that have been denied. Report includes: Employee Name, ID, Type, Date Denied, Denied By, Request Date, Leave Date, Leave Type, Leave Hours and the Note for Reason for Denial. |

## *Sick/FMLA Leave Usage*

Sick Leave and FMLA Leave Usage by Employee, by Date.  Includes EOD, Sick Leave, FMLA separated into Sick, LWOP, COP, IOD, SLDC, and SLDC (nonFMLA).

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Date Range** | **From/Through** | Defaults through to current system date. | Restricts the date range of the report. |

## *Unscheduled Occurrences*

Unscheduled and No Unscheduled Occurrences.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Date Range** | **From/Through** | Defaults through to current system date. | Restricts the date range of the report. |
| **Employee Type** | **Type** | Casual, FTR, PTF, PTR, Relief, TE, Temp | Restricts report to the employee type chosen. Leave blank to report on all employees within the other parameters. |
| **Report Type** | **Occurrences** | **# Occurrences (required)** | Restricts report to employees with occurrences of unscheduled absences equal to or greater than the # of Occurrences entered by User during the date range. Gives total number of occurrences by employee. |
| | **No Occurrences** | | Restricts report to employees with no occurrences of unscheduled absences during the date range. |

## *Leave Summary by Day*

Number of instances and hours of leave by date.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Date Range** | **From/Through** | Defaults through to current system date. | Restricts the date range of the report. |
| **Leave** | **Class** | Leave Category Combo<br>Annual, Sick, LWOP, FMLA | Restricts report to instances of the leave category combo. |
| | | Hour Codes<br>All general Hour Code categories, i.e. Part Day LWOP, Annual, Sick, Full Day LWOP | Restricts report to instances of the generalized hour codes of leave. |
| | | Hour/Reason Codes<br>All specific Hour Code categories, i.e. Part Day LWOP – Preferred, Part Day LWOP – Maternity; Part Day LWOP – Personal | Restricts report to instances of the hour/reason codes of leave. |
| | | 3972 Summary<br>All 3972 abbreviations of leave, i.e. fSL, SWOP, ADL | Restricts report to instances of the 3972 abbreviation categories of leave. |

## *% Leave Requiring Doc*

Percentage of leave entered requiring documentation.  Report includes the total # of entries, the # that required documentation and the % thereof by day.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Date Range** | **From/Through** | Defaults through to current system date. | Restricts the date range of the report. |
| **Employee Type** | **Type** | Casual, FTR, PTF, PTR, Relief, TE, Temp | Restricts report to the employee type chosen.  Leave blank to report on all employees within the other parameters. |

## *Leave Usage Log*

How much and what leave was used; report includes Employee Name, ID, Leave Start and End times, Request and Leave Date, Leave Type, Hours, Scheduled YorN and Doc Req YorN.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| Date Range | From/Through | Defaults through to current system date. | Restricts the date range of the report. |
| Report Type | By Leave Date | Default choice. | Restricts report to leave that occurred within the date range. |
| | By Call-In Date | | Restricts report to leave that was requested within the date range. |
| | Leave Usage Count | | Lists the number of calls by date. |
| Scheduled Indicator | Unscheduled | Default choice. | Restricts report to only unscheduled leave. |
| | Scheduled | | Restricts report to only scheduled leave. |
| | All | | Reports on both unscheduled and scheduled leave. |

## *Ready for Review*

Employees whose Review is due.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Date Range** | **From/Through** | Defaults through to current system date. | Restricts the date range of the report. |

## *PS3971*

Print, **or reprint,** all, or a selection of, 3971's for a particular date range.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Date Range** | **From/Through** | Defaults through to current system date. | Restricts the date range of the report. |
| **Report Option** | **Print All** | | Prints all 3971's. |

To print 3971's:

1. Complete the date range. **This is a midnight to midnight date range; if you want November 8th's 3971's, you must enter a date range of 11/08/01 to 11/09/01**. (see 2nd print screen)

2. Click **Find**. The **Employees Matching your Query** populates with all of the 3971's for **leave date** of 11/08/01. (3rd print screen) The list defaults to an Employee ID sort. You may click **Last Name or Printed** to change the sort. If you click **Printed**, the 3971's that have **never** been printed will appear on the top of the sort. (4th print screen)

3. **Select the 3971's you want to print**:

- **All**: Click the check-box **Print All**.

- **A single 3971**: Hold the **Shift** key and click the **[>]** beside the 3971 you want to print. (5th print screen)

- **A contiguous group of 3971's**: Hold the **Shift** key and click the **[>]** beside the **1st** 3971 you want to print and the **last** 3971 you want to print. (6th print screen)

- **A non-contiguous group of 3971's**: Hold the **Ctrl** key and click the **[>]** beside all of the 3971s you want to print. (7th print screen)

4. Click **Run**. The print window will appear. Follow the print instructions on page 6.

**Proper date range to
use to find the 3791's
for 11/08/01.**

Selection of a single 3971 using the Shift
key.
(The yellow one is the selected one.)

**Sorting by clicking Printed puts the
3971s that have never been printed at
the top of the list.**

Selection of a group of 3971s using the Shift key.
(The yellow ones are the selected ones.)

**Selection using the Ctrl key.
(The yellow ones are the selected ones.)**

Shows the date the 3971 was
printed when complete.

## *FMLA Eligibility*

Reports of employees who may be eligible for FMLA, who may not be eligible for FMLA, and those who have a high usage of FMLA leave.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **FMLA Eligibility** | **May Be Eligible** | | Restricts the report to those employees who **may** be eligible for FMLA. |
| | **May Not Be Eligible** | | Restricts the report to those employees who **may not** be eligible for FMLA. |
| | **High Usage** | | Restricts the report to those employees who have high usage of FMLA. |
| | **All Employees** | | Reports on all employees within the selected criteria. |

## *FMLA Reports*

Approaching FMLA Re-Certification Report, Pending Documentation Due Report, Pub 71 Six Month Report

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Date Range** | **From/Through** | Defaults through to current system date. | Restricts the date range of the report. |
| **Report Type** | **Approaching FMLA Re-Certification** | Default choice. | List of employees with an approaching FMLA Re-Certification date within the date range. |
| | **Pending Documentation Due** | | List of employees with documentation due within the date range. |
| | **Pub 71 Six Month** | | List of employees to whom it will be 6 months since the sending of the Pub 71 within the date range. |

## *T&A Reconciliation*

List of discrepancies between eRMS and T&A data.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Calendar Year/Pay Period Range** | **Calendar Year** | Defaults to current calendar year. Available years are 2 years prior and 2 years future. | Restricts the year of the report. |
| **Pay Period Range** | **From/Through** | Any pay period for the Calendar Year chosen. | Restricts the range of the report to just the pay period (s) chosen. |

## *Payroll Reconciliation*

List of discrepancies between eRMS and Payroll data.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Calendar Year/Pay Period Range** | **Calendar Year** | Defaults to current calendar year. Available years are 2 years prior and 2 years future. | Restricts the year of the report. |
| **Pay Period Range** | **From/Through** | Any pay period for the Calendar Year chosen. | Restricts the range of the report to just the pay period (s) chosen. |

## *Messages*

Lists of, or a count of, system-generated messages.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| Date Range | From/Through | Defaults through to current system date. | Restricts the date range of the report. |
| Message Type | Admin Action | | Restricts report to only Administrative Action messages. |
| | Attendance Review | | Restricts report to only Attendance Review messages. |
| | Escalation | | Restricts report to only Escalation messages. |
| | Feedback | | Restricts report to only Feedback messages. |
| | FMLA Request | | Restricts report to only FMLA Request messages. |
| Message Status | Open | | Restricts report to only Open messages. |
| | Closed | | Restricts report to only Closed messages. |
| | All | | Reports both Open and Closed messages. |
| Report Type | Message List | | Lists actual messages. Includes Sender Role, Creation Date, Employee Name & ID, Status, Type, and Message. |
| | Message Count | | Reports a count of the messages. Includes Pay Location, # of Each Message Type, % that have Escalated and the total message count by pay location. |

## *Message Hier & Role Definition*

Message Role Hierarchy Report, Pay Location/Role Cross Reference Report, Unassigned Mandatory Roles Report.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Report Type** | **Message Role Hierarchy** | | Details the message hierarchy. It will show you the User ID, the User Name, Message Level and Role. |
| | **Pay Location/Role Cross Reference** | | Details Users by Pay Location. Shows Login Ids of the occupants of every role and the vacancies (shown by no name being listed) by the Finance Number/Pay Location combination. |
| | **Unassigned Mandatory Roles** | | Details Unassigned Mandatory eRMS Roles. Shows the Pay Location, the number of employees in that Pay Location, all of the mandatory roles and the vacancies (indicated by 3 question marks - ???). |

## *Schedules*

Employee Schedules.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Week** | **Current Week – Week of** | Default choice. | Restricts the report to the current week's schedules. |
| | **Next Week – Week of** | | Restricts the report to next week's schedules. |

## *Hours Use Analysis*

Summarizes the hours used for a range of days.  Shows each leave category and the categories percentage as compared to work hours.

| Parameter Title | Parameters | Choices within the Parameters | Result |
|---|---|---|---|
| **Date Range** | **From/Through** | Defaults through to current system date. | Restricts the date range of the report. |

# Chapter 4 - eRMS Messages

## The eRMS Message Inbox

The eRMS Message Inbox is the heart and soul of the messaging system.  **All** current, unanswered or undeleted messages within the eRMS System, whether User-to-User or System-Generated, will appear in the Inbox upon a successful login.

The messages will default to a sort by the **employee name**.  In User-to-User messages, the employee name will be the same as the Sender of the initial message.  In System-Generated messages, the Employee Name will be the involved employee (the employee on whom the attendance review message is about or the User on whom the escalation message is about).  If there are multiple messages on the same employee, they will be sorted together by the occur date. All System-Generated Messages on the employee will be listed first and then any user-to-user messages generated by the same employee.

In the screen below, the supervisor who logged in, has 1 system-generated message and 1 user generated message.

In order to see the **subject** of the message, you must move the scroll bar at the bottom of the Message Inbox to the right, results of which are seen in the 2nd screen below.

### Elements of Message Inbox

| Element | Description |
|---------|-------------|
| **Message Inbox** | |
| Employee Name | Name of the involved employee; in system-generated messages, the employee about whom the message is; in user-to-user messages, the author of the message. |
| Employee ID | The social security number of the Employee Name. |
| Occur Date | The date of the occurrence which generated the message; in system-generated messages, the date of the absence which breached the 90 day limit or the date that the message escalated to the next supervisory level; in user-to-user messages, the date of the message. |
| Create Date | The date the message was actually created; in system-generated messages, the date the absence which breached the 90 day limit was entered or the date that the message escalated to the next supervisory level; in user-to-user messages, the date of the message. |
| Type | Type of message; **Attendance Review, Escalation, Feedback, FMLA Request, User-to-User**. |
| Sender | The Name of the sender of the message; for attendance review messages, this will be the ACS who entered the leave. |
| Sender Role | The Role of the sender of the message. |
| Subject | The subject title of the message; in system-generated messages these are defaulted dependent upon the type of message; in user-to-user messages, it is the subject the author typed. |
| **Message Body** | The entire body of the message may be viewed here. This enables you to see the message before responding to it. |

The Message Inbox can be resorted by clicking any of the title boxes listed above (except for message body).

To highlight any message, and therefore, see it's message body, simply click the **[>]** beside the message you wish to see.  That line will turn yellow and it's message body will appear in the bottom portion of the screen.

# eRMS User Generated Messages

Use the **eRMS Messages** option to compose and send messages to other eRMS users and to compile and edit private mailing lists. Use the **Messages** option to read, reply to and forward messages sent to you by other eRMS users.

Messages automatically generated by the eRMS system display when the recipient logs onto the eRMS system.  Refer to System Generated Messages on page 248 for additional information.

# *To compose and send a message*

From the Main Menu:

1. Click **Messages**.

2. The Message Inbox will appear.

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**Note:** The information you write using the Messages option may be discoverable. You are responsible for insuring that all information entered in your messages is professional and appropriate in style and content. **Article 16.2 discussions may NOT be recorded in this section.**

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1. Click **New Message**.

---

2.  Activate the drop-down **To:** list.  This list will include a selection for **All**, a complete alphabetical list of all users by their name with their role alongside, and, within the alphabetical list, any mailing lists which you have created (more detail on how to on page 237).  The mailing lists will have an * under the Mail List column and will not have a role listed.

3.  Highlight and click the intended recipient of this message.

4.  If you wish to jump down the list, type the beginning letters of the name you are seeking.  The
    will appear in the **Find** box in front of the % sign and the list will automatically start to seek
    what you are typing.  In the screen below, an **s** was typed.

5. Type the **Subject** of your message.

6. Tab to the **New Message** area.

7. Type your message. (**Do not enter restricted medical information**.)

8. Click **Send**.  Click **OK** to Message has been sent message.  This will return you to the Message Inbox.

## *Creating a Mail List*

Access the New Message Window as described above.

1.  Click **Mail List**. The Mailing List Maintenance Window will appear.

2. The Window is divided into two parts, the Mailing Lists List and the Users' Lists (those not assigned to the current mailing list and those assigned to it).

3. To **create a new list**, click **Add List**. A blank, highlighted (yellow) line will appear at the bottom of any lists you already have.  This will also remove the Users' Lists portion of the Window.

4. Click within the blank line in order to activate the cursor.

5. Type **Mailing List Name**.

6. Click **Save**.  Click **OK** to Save Successful Message.  The Mailing List Name will alphabetize within the Mailing Lists List and the Users' Lists will reappear.

7. **Select the users you wish to assign to this mailing list**.

- All: **Click >> button.**

- A single User: Click the name you want. **Click > button.**

- A contiguous group of User's: Hold the Shift key and click the 1st User you want and the last User you want. **Click > button.**

- A non-contiguous group of User's: Hold the Ctrl key and click all of the Users you want. **Click > button.**

- **To Remove Users from Lists:** Select the user you wish to delete, in any one of the above fashions, and **Click < button**.

7. Click **Save**. Click **OK** to Save Successful message.

8. Click **Close** to return to the New Message Window.  The drop-down list is immediately updated with your new list.

**To delete an entire mailing list:**

1. Click **Add List**.  This enables the **Delete List** button.

2. Click the **[>]** beside the list you wish to delete.  It becomes highlighted (turns yellow).

3. Click **Delete List**.

4. Click **OK** to "Are you sure you want to delete this Mail List?" message.

5. Click **OK** to Delete Successful message.

6. Click **Close** to return to the Message Inbox.

7. Any outstanding messages to the members of the deleted list will remain in their Message Inbox until acted upon by them.

## *To read a User-to-User message sent to you*

Access the **eRMS Main Menu** as described at the beginning of this chapter.

1. Any **User-Generated Messages, as well as System-Generated Messages,** for you will appear immediately following a successful Login.

2. Click the **[>]** beside the message you wish to view.

3. The **Message Body** populates with the contents of that message.  **The Respond, Forward and Deactivate** buttons now all become enabled.  These are the 3 buttons which allow you to react to a User-to-User message.  The **New Message** button is always enabled whenever the Message Inbox is active.

## *To Respond to a Message:*

1. Click **[>]** beside the message you wish to respond to.  (in this case, we are working with the User-to-User message)

2. Click **Respond**.

3. The To: box defaults to the original sender.

4. The Subject: box defaults to that of the original message.

5. The Message to which you are responding appears in the bottom box.

6. Type your response in the top box and click Send.

## *To Forward a Message:*

1. Click Forward.

2. The To: box defaults to blank.

3. Activate the drop-down list to choose to whom you wish to forward this message. (highlight and click the desired recipient)

4. The Subject: box defaults to **FW:** the original subject title.

5. The message you are forwarding appears in the bottom box.

6. Type your message in the top box.

7. Click Send.

8. The message that the person you forwarded it to will receive will look like the screen shot below.  The original message (the part that was forwarded) will be below your new message, separated by a line of *******.

## *To Deactivate Message:*

1. Click **Deactivate Message** to delete the message from the eRMS System.  Click **OK** to the You are about to Deactivate this Message message.  This will delete the message from the Message Inbox.  You **must  deactivate** the message even if you have responded to it or forwarded it.  This will return you to the Message Inbox.  If you have remaining messages, they will be listed; if you do not, as in this case, the Message Inbox will appear empty.  Click **Close** to return the Main Menu.

# System Generated Messages

System generated messages are

1. **Review and Respond** messages eRMS automatically generates based on the business thresholds assigned using the eRMS User Setup Utility.

2. FMLA Request messages when a **new** FMLA case is requested by the ACS during a leave entry.

3. Messages to the ACS from the FMLA Coordinator when an FMLA Case is Disapproved.

4. Messages from the Labor Representative to the Supervisor after Labor has Reviewed and Responded to an Administrative Action created by the Supervisor.

5. When a message requiring action is not appropriately acted upon, eRMS generates additional message(s) to successive levels of management. The escalation message will **initially go to the immediate supervisor of the User who has failed to 'Review & Respond' in the**

**appropriate time frame**. Therefore, if the FMLA Coordinator or Labor Representative's supervisor is **also in a role of Supervisor within the message system**, the **Supervisor is the first recipient of the escalation message on the FMLA Coordinator or Labor Representative**. The **Manager** will receive a message **if the Supervisor does not respond**. This message will be a failure of the Supervisor, not the FMLA Coordinator or Labor Representative. The message will continue to escalate **until the original message is reviewed and responded to**. Therefore, if a Supervisor **'Reviews & Responds'** against the FMLA Coordinator or Labor Representative **but the FMLA Coordinator or Labor Representative does not 'Review & Respond' to the original message**, the Supervisor's failure will be escalated to the Manager. Yes, the Supervisor responded but the User below (FMLA Coordinator or Labor Representative) still has not responded to the original message; this is a failure of the Supervisor that is escalated to the Manager because the action of the Supervisor during their "Review & Respond" did not prompt the FMLA Coordinator or Labor Representative to properly do their job and review and respond to the initial message.

---

**Note:**   If a user fails to log in to the eRMS system in order to retrieve messages that require 'Review & Respond' action, and does so long enough to breach the business threshold for message escalation, the 'Failed to Review and Respond' message **will be generated** to the next level of management.

---

The following Windows display, based on the eRMS user to whom the message is sent and the reason for the message:

- **Message sent to Supervisor because of an Attendance Review Request:** the Administrative Action Window.

- **Message sent to Labor Representative:** the Administrative Action Window.

- **Message sent FMLA Coordinator:** FMLA Data Window.

- **Message sent to Supervisor because of a failure by FMLA Coordinator or Labor Representative:** the Supervisor Comments Window.

- **Message sent to Manager, Senior Manager or Site Coordinator:** the Supervisor Comments Window.

| Occurrence | Result |
|---|---|
| ACS enters leave breaching 90-day limit set in Business Rules on Jane Smith. | Attendance Review message to **Supervisor Dick Taylor** about employee Jane Smith. |
| Supervisor ignores Attendance Review Message for escalation limit of days set in Business Rules. | Escalation message to **Manager John Thomas** about Supervisor Dick Taylor. |
| Manager Reviews & Responds to escalation message about Supervisor.<br>Supervisor continues to ignore the initial Attendance Review Message beyond the escalation limit of days set in Business Rules. | Escalation message to **Sr Manager Barbara Jones** about Manager John Thomas. |
| | |
| ACS enters new FMLA request. | FMLA Request message to **FMLA Coordinator Jim Williams**. |
| FMLA ignores FMLA Request Message for escalation limit of days set in Business Rules. | Escalation message to **Supervisor Dick Taylor** about FMLA Coordinator Jim Williams. (**Dick Taylor is Jim Williams' Supervisor**) |
| Supervisor Reviews & Responds to escalation message about FMLA Coordinator.<br>FMLA Coordinator continues to ignore the initial FMLA Request Message beyond the escalation limit of days set in Business Rules. | Escalation message to **Manager John Thomas** about Supervisor Dick Taylor. |
| Manager Reviews & Responds to escalation message about FMLA Coordinator.<br>FMLA Coordinator continues to ignore the initial FMLA Request Message beyond the escalation limit of days set in Business Rules. | Escalation message to **Sr Manager Barbara Jones** about Manager John Thomas. |
| | |
| Supervisor creates Administrative Action on Jane Smith. | Administrative Action message to **Labor Representative Bob Johnson**. |
| Labor Representative ignores Administrative Action Message for escalation limit of days set in Business Rules. | Escalation message to **Supervisor Dick Taylor** about Labor Representative Bob Johnson. (**Dick Taylor is Bob Johnson's Supervisor**) |
| Supervisor Reviews & Responds to escalation message about Labor Representative.<br>Labor Representative continues to ignore the initial Administrative Action beyond the escalation limit of days set in Business Rules. | Escalation message to **Manager John Thomas** about Supervisor Dick Taylor. |
| Manager Reviews & Responds to escalation message about Labor Representative.<br>Labor Representative continues to ignore the initial Administrative Action beyond the escalation limit of days set in Business Rules. | Escalation message to **Sr Manager Barbara Jones** about Manager John Thomas. |
| | |
| If at any time during the escalation process, the User who has an open message (i.e., Supervisor, Labor Representative or FMLA Coordinator, properly Reviews & Responds to the open message, the escalation will stop.) | |

**eRMS Messaging System**

```
┌─────────────────────────────┐
│       Site Coordinator       │
│          Receives            │
│       Escalation of Sr       │
│       Manager Failure        │
└─────────────────────────────┘
┌─────────────────────────────┐
│       Senior Manager         │
│          Receives            │
│        Escalation of         │
│       Manager Failure        │
└─────────────────────────────┘
┌─────────────────────────────────────────┐
│                 Manager                   │
│  Receives Escalation of Supervisor Failure│
│   whether to Attendance Review Message    │
│     or as Supervisor of FMLA or Labor     │
└─────────────────────────────────────────┘
┌─────────────────────────────────────────┐
│               Supervisor                  │
│            of FMLA or Labor               │
│           Receives Escalation             │
│          of FMLA or Labor Failure         │
└─────────────────────────────────────────┘
```

| FMLA | Supervisor | Labor |
|------|-----------|-------|
| Receives FMLA Request from ACS leave entry Generates Deny FMLA Leave, Change Entry back to ACS | Receives Attendance Review from ACS leave entry & Feedback from Labor Action | Receives Admin Action from Supervisor entry & generates Feedback to Supervisor |

| ACS | ACS |
|-----|-----|
| Generates FMLA Request for NEW Cases; Receives Deny FMLA Leave, Change Entry Message from FMLA | Generates Attendance Review for breach of 90 days' |

## *Attendance Review Messages*

When a business threshold for attendance is breached, the entry by the ACS generates a message to the Supervisor of the employee. The **Attendance Review Message generated** Window presents to the ACS. Simply click **OK** to remove window and proceed.

If an ACS enters consecutive days of absence **beyond the business threshold**, the ACS is given an opportunity to either **send** another message to the supervisor or **not**. If an ACS enters 2 unscheduled leaves in the same day, the ACS is given an opportunity to either **send** another message to the supervisor or **not**.

Click **Yes** if you want to generate an additional message; click **No** if you do not.

- For messages generated by the Business Thresholds set in the eRMS User Setup Utility, or generated because necessary data was not on file, or generated by an action of another administrative user, the window lists the name, in the **Sender** field, of the administrative user (ACS, Supervisor, Labor, FMLA Coordinator) who's action generated the Review and Respond for the other user. For example, the ACS enters an unscheduled absence that breaches the Business Threshold; the Supervisor receives the Review and Respond message to Review Attendance on the employee; the **Sender** field will be populated with the ACS's name.

- For messages generated due to the failure of an administrative user to Review and Respond in a timely manner, it Lists the name, in the **Sender** field**,** of the administrative user (Supervisor, FMLA Coordinator) who **failed** to Review and Respond in a timely manner.

## *Supervisor Response to Attendance Review Message:*

1. Click the **[>]** button, when necessary, to find the correct Review and Respond message. (notice that there are 2 messages generated on George Hobbs are they are sorted by the Occur Date)

2. Click **Rev & Respond**.  Complete the Administrative Action Window as described earlier in Chapter 3b – Actions.  This will generate an Administrative Action message to the Labor Representative.

## *Labor Representative Response to Administrative Action Message:*

1. Click the **[>]** button, when necessary, to find the correct Review and Respond message.

2. Click **Rev & Respond**.  Complete the Administrative Action Window as described earlier in Chapter 3b – Actions.  This will generate either an Administrative Action or a Feedback message to the Supervisor.  (Administrative Action if Labor Representative **does not concur (1st screen)**; Feedback if Labor Representative **does concur (2nd screen)**.

If the message returns to the Supervisor as an **Administrative Action** (as above), the Supervisor will have to click **Rev & Respond** and adjust their action in order to return it to the Labor Representative a second time for review.  As you can see, the Administrative Action on George Hobbs still takes precedence over the Attendance Review message because of the Occur Dates.

If the message returns to the Supervisor as a **Feedback** (Labor Representative concurred), the only option for the Supervisor is to **Deactivate** the message.  You will also notice that, within the George Hobbs' messages, the Attendance Review is 1st; this is because it is a **Rev & Respond** type message and takes precedence over the Feedback message.

## *FMLA Messages*

When an ACS enters a request for New FMLA Case during leave entry, a message is automatically generated to the FMLA Coordinator responsible for the employee. The **FMLA Request Message generated** Window presents to the ACS. Simply click **OK** to remove window and proceed.

## *FMLA Coordinator's Response to FMLA Request Message*

1. Click the **[>]** button, when necessary, to find the correct Review and Respond message.

2. Click **Rev & Respond**.  Complete the FMLA Data as described earlier in Chapter 3b – Actions.

If the FMLA Coordinator denies the case (makes the Action Status a 2 for disapproved), a message will be generated to the ACS who entered the leave informing the ACS to change the leave to a non-FMLA type leave.  If the ACS who entered the leave is no longer responsible for that employee's finance number/pay location combination, the FMLA Coordinator will be given a **Deny FMLA Message – User Selection** window to choose who to send the Deny FMLA message to.

Highlight and click the User you wish to send the Deny FMLA Message to. Click **Select**.   You will receive the following message. Click **OK** to it and **Close** to return to the Message Inbox.

## *ACS Response to Deny FMLA Message*

When the FMLA Coordinator has disapproved a case, the ACS will receive a message in the Message Inbox like in the screen below.

1.  Click the **[>]** button, when necessary, to find the correct Review and Respond message.

2.  The ACS has 3 choices: **Respond, Forward, Deactivate**.  The suggested course of action for the ACS is as follows:

3.  **Forward the message to the employee's Supervisor**.  Include a request from the Supervisor for a corrected 3971 and that the Supervisor return the corrected 3971 to you.

4.  **Do Not Deactivate the message until you receive the corrected 3971 back from the Supervisor**.  By **not deactivating the message**, every time you log in you will get a reminder that the Supervisor stills owes you the corrected 3971.  It is not a 'reminder' that you need respond to; it is just a 'tickler' that you still need to change the leave to a non-FMLA type leave.  Also, by **not deactivating the message**, you can **forward it to the Supervisor again** to remind them.

5.  When you receive the corrected 3971, **and edit the leave within eRMS to match the corrected 3971**, you can then deactivate the FMLA Deny Message.

## *Any User Not Taking Action*

There are three ways for a User to not Review and Respond on a system-generated message.

1.  Don't login to the eRMS System in order to receive the message in the first place.  If a User does this for enough days in a row that the Business Threshold for Escalating Messages is breached, the next level of management will be advised of the user's failure to Review and Respond.

2.  Login to the eRMS System.  When the Messaging Window appears, click Close.  Again, if this continues beyond the Business Threshold for Escalating Messages, the next level of management will be advised of the user's failure to Review and Respond.

3.  Click Review and Respond and then click the Close button in the eRMS Administrative Action Window (to exit the window without taking any action).  If a user does this, the following message will appear to confirm the request.

4.  If the user clicks **No**, the message is closed without any Review and Respond being completed and the message remains in the Message Inbox.

5.  Any combination of the above 3 processes will also escalate the message.  Basically, if the message remains in the Message Inbox beyond the Business Rules threshold, the escalation process begins.  Also, as long as the message remains in the Message Inbox, the escalation process will continue even if the higher levels respond to the Review and Respond messages they have received.

# *Next Level of Management Receiving Failure to Review and Respond Message*

When any user fails to Review and Respond in a timely fashion, the next level of management is advised.

The **immediate supervisor** of the user who has failed to Review & Respond in a timely fashion will receive a Review and Respond message upon successful login, once the Business Rules threshold for escalation of messages has been breached.

When a next level of management receives one of these messages, the **Supervisor's Comment** Window appears, not the Administrative Action Window. Complete **Supervisor's Comment** as described earlier in Chapter 3b - Actions.

If the FMLA Coordinator or the Labor Representative is in the finance number/pay location combination for which a Supervisor is responsible, the **first escalation message** will go to that Supervisor, not to the Manager.

For instance, if clerk **Tom Smith** is detailed to a 204B position as a Labor Representative and fails to Respond and Review properly to a message, the Supervisor of Tom Smith's finance number/pay location combination (Jane Jones, **his immediate supervisor)** will receive the first escalation message. During the 204B detail, Tom Smith is probably not reporting directly to Jane Jones **but Jane Jones is his immediate supervisor and therefore will receive the first escalation message**.

**Note:** The information you write using the Supervisor's Comments may be discoverable. You are responsible for insuring that all information entered in the Supervisor Comments is professional and appropriate in style and content.

## Need to place print screens of escalated messages.

**Need to place print screens of escalated messages**.

**Need to place print screens of escalated messages**.

# Roles and Responsibilities

*Table 1: Roles & Responsibilities*

| ACS | Attendance Control Supervisor | **Report Only** | Report Only |
|---|---|---|---|
| **FMLA Coord** | FMLA Coordinator | **Senior Manager** | Plant Mgr/DM/MPOO/PM/SR MDO<br>Plant Manager<br>District Manager<br>Manager, Post Office Operations<br>Post Master<br>Senior MDO |
| **HR** | Human Resources | **Site Admin** | Site Administrator |
| **Labor Rep** | Labor Representative | **Site Coord** | Site Coordinator |
| **Manager** | MDO/MCSO/MCS<br>Manager, Distribution Operations<br>Manager, Customer Service Operations<br>Manager, Customer Services | **Supervisor** | SDO/SCS<br>Supervisor, Distribution Operations<br>Supervisor, Customer Services |

| Function | Task | Read and Write | Read Only | Write Only | Not Authorized Access |
|---|---|---|---|---|---|
| **Employee Management Actions** | Enter/View Leave | ACS<br>Site Admin | All others | -------------- | ------------------ |
| | Add a Holiday | ACS<br>Site Admin | ------------------ | -------------- | All others |
| | Add a Scheduled Day Off | ACS<br>Site Admin | ------------------ | -------------- | All others |
| | Change a Holiday to a workday | ACS<br>Site Admin | ------------------ | -------------- | All others |
| | Change a Scheduled Day Off to a workday | ACS<br>Site Admin | ------------------ | -------------- | All others |

| Function | Task | Read and Write | Read Only | Write Only | Not Authorized Access |
|---|---|---|---|---|---|
| | Deny Leave | Site Admin ACS Supervisor | ---------------- | -------------- | All others |
| **Employee Management Reports** | T/A Reconciliation Report | ------------------ | All | -------------- | ------------------ |
| | Maintain Employee FMLA Documentation | FMLA Coordinator Site Admin | All others | -------------- | ------------------ |
| | Send or Review Supervisor Notes | All | ----------------- | -------------- | ------------------ |
| | Document or Review Administrative Action History | Supervisor Labor Rep Manager Senior Mgr | All others | -------------- | ------------------ |
| **Scheduling & Staffing Management** | Maintain Department Work Schedules | All | ----------------- | -------------- | ------------------ |
| | View/Print Schedules | ----------------- | All | -------------- | ------------------ |
| | View/Print Leave Usage Log | ----------------- | All | -------------- | ------------------ |
| **FMLA** | Review FMLA Message Lists | ----------------- | All | -------------- | ------------------ |
| | Review FMLA Pending Docs Due | ----------------- | All | -------------- | ------------------ |
| | Review FMLA Pub 71 Six Mo Old | ----------------- | All | -------------- | ------------------ |
| **Time & Attendance** | T/A & Payroll Reconciliation Reports | ----------------- | All | -------------- | ------------------ |
| | eRMS User Generated Messages | All | ----------------- | -------------- | ------------------ |
| | System Generated Messages – Response Required | Supervisor FMLA Coor Labor Rep | ----------------- | -------------- | ------------------ |
| | System Administration | Site Admin | ----------------- | -------------- | All others |
| | Employee Management | ACS FMLA Coor HR Site Admin | ----------------- | -------------- | All others |

# Designation / Activity Codes

The following table interprets the designation / activity (D/A) code in the D/A field on the Employee Administration.

| Employee Category | Mgmt Craft | Supv | Full Time | P-T Reg | P-T Flex | Temp | Casual | Relief | Transitional |
|---|---|---|---|---|---|---|---|---|---|
| FIELD OFFICES | | | | | | | | | |
| Postmasters | Mgmt | 080 | | 380 | | 589 | | 580 | |
| Managers & Supervisors | Mgmt | 090 | | | | | | | |
| ▪ VMF Supervisors | | 053 | | | | | | | |
| ▪ Maint/Bldg Svs | | 066 | | | | | | | |
| ▪ Maint/Plant & Equipment | | 067 | | | | | | | |
| ▪ Maint/Postal Operating Equipment | | 068 | | | | | | | |
| ▪ Maint/Administrative | | 069 | | | | | | | |
| Non-bargaining Prof/Tech/Admin Staff | Mgmt | | 190 | 390 | 490 | 590 | | | |
| Medical Officers & Head Nurses | Mgmt | 090 | | 390 | | | | | |
| Nurses | NPPN | | 111 | | 411 | | | | |
| Clerks | APWU | | 110 | 310 | 410 | | 610 | | 810 |
| Mail Handler | NPMHU | | 120 | 320 | 420 | | 620 | | |
| City Delivery Carriers | NALC | | 134 | 334 | 434 | | 634 | | 834 |
| Vehicle Operators | APWU | | 135 | 335 | 435 | | 635 | | 835 |
| Special Delivery Messengers | APWU | | 140 | 340 | 440 | | 640 | | 840 |
| VMF Mechanics & Analysts | APWU | | 151 | 351 | 451 | | 651 | | 851 |
| VMF Garagemen & Jr. Mech. | APWU | | 152 | 352 | 452 | | 652 | | 852 |
| VMF Administrative | APWU | | 153 | 353 | 453 | | 653 | | 853 |
| Main/Bldg. Svc | APWU | | 166 | 366 | | | 666 | | 866 |
| Main/Bldg. & Plant Equip | APWU | | 167 | 367 | | | 667 | | 867 |
| Maint/Postal Operating Equip | APWU | | 168 | 368 | | | 668 | | 868 |
| Maintenance-Administrative | APWU | | 169 | 369 | | | 669 | | 869 |
| Regular Rural Carrier | NRLCA | | 710 | | | | | | |
| Temp Relief Carrier | NRLCA | | | | | | | 700 | |
| Temp Relief Carrier (1) | NRLCA | | | | | | | 701 | |
| Sub RC Serving Vacant Rt | NRLCA | | | | | | | 720 | |
| Substitute Rural Carrier | NRLCA | | | | | | | 730 | |

| Employee Category | Mgmt Craft | Supv | Full Time | P-T Reg | P-T Flex | Temp | Casual | Relief | Transit ional |
|---|---|---|---|---|---|---|---|---|---|
| RCA Serving Vacant Route | NRLCA | | | | | | | 740 | |
| Rural Relief Carrier | NRLCA | | | | | | | 750 | |
| Auxiliary Rural Carrier | NRLCA | | | | | | | 770 | |
| Rural Carrier Associate | NRLCA | | | | | | | 780 | |
| RCA Serving Auxiliary Rt | NRLCA | | | | | | | 790 | |
| HQ & RELATED OFFICES:  CAG M-Z (excluding CAG 'S') | | | | | | | | | |
| All Employees | Mgmt | 119 | 119 | 319 | 419 | 519 | 619 | | 819 |
| HQ & RELATED OFFICES  CAG S | | | | | | | | | |
| Postal Inspector | Mgmt | 089 | 08-9 | | | | | | |
| Non-inspectors | Mgmt | 119 | 119 | 319 | 419 | 519 | | | |
| Postal Police Officers | Mgmt | 179 | 179 | | 479 | | | | |

# Acronyms, Terms and Definitions

## Absence Codes

| U.S. Postal Service **Absence Analysis** | Employee's Name SULLIVAN, MICHAEL C. | Employee ID 800-16-3657 | Pay Location 100-NAME UNAVAILABLE |
|---|---|---|---|
| Leave Year 2001 | | *Instructions* | |

Using the codes below, and the hours involved, post current and previous quarters. Precede with letter 'F' when absence is recorded as Family Medical Leave Act (FMLA) and with 'U' when absence is recorded as unscheduled on Form 3971. Post additional quarters if circumstances warrant. This form may also be used on an ongoing basis. On the reverse of this form, the employee's supervisor records attendance-related actions; e.g., review of attendance, commendations, restricted sick leave, Letters of Warning, suspensions, etc. A running total of FMLA hours used may be kept on the reverse side of this form.

| | | | | | |
|---|---|---|---|---|---|
| Absent from Schedule OT | AOT* | Emergency AL | EAL* | Sick Leave | SL |
| Absent Without Leave | AWOL* | Family Medical Leave Act | F | Sick Leave/Dependent Care | SLDC |
| Annual Leave | AL | Holiday Leave | H | | |
| Annual Leave in Lieu of SL | SAL* | Late Reporting | L* | *Note: These are not separate leave | |
| Administrative Leave | ADL | Leave Without Pay | LWOP | categories, but a distinction is made for | |
| Continuation of Pay | COP | LWOP in Lieu of SL | SWOP* | the purpose of analysis.* | |
| Court Leave | CL | Military Leave | ML | | |

# Acronyms, Terms and Definitions

## Time & Attendance

| Description | TACS Hour Code | TACS Reason Code | PSDS | ETC | Abbreviation |
|---|---|---|---|---|---|
| Full Time LWOP – Proffered | 060 | 02 | 21 | | LWPR |
| Full Time LWOP – Personal | 060 | 03 | 22 | | LWPE |
| Full Time LWOP – Other | 060 | 04 | 23 | | LWPO |
| Full Time LWOP – Maternity | 060 | 05 | 26 | | LWPM |
| Full Time LWOP – Suspension | 060 | 06 | 27 | | LWPS |
| Full Time LWOP – Pending Termination | 060 | 08 | 29 | | LWPT |
| Full Time LWOP – Late | 060 | 09 | | | LWPL |
| Full Time Union Official Leave | 060 | 07 | 28 | 84 | LWPU |
| Telephone Time | | | | 32 | |
| Guarantee Telephone Time | | | | 33 | |
| Beeper Time | | | | 34 | |
| Extra Straight Time | 035 | 00 | | 35 | |
| Guarantee Telephone Overtime | | | | 36 | |
| Penalty Overtime Payment | 043 | 00 | | 43 | |
| Military LWOP | 044 | 00 | 44 | 44 | MLWP |
| Military Leave | 067 | 00 | 05 | 67 | ML |
| Donated Leave – Personal | 046 | 00 | 46 | 46 | DLVP |
| Rural Free Saturday | | | | 47 | |
| Holiday Schedule Premium | | | | 48 | |
| Rural Carrier Trips | | | | 50 | |
| Rural Carrier Actual Hours | | | | 51 | |
| Work Hours | 052 | 00 | | 52 | |
| Overtime Hours | 053 | 00 | | 53 | |
| Night Work Premium Hours | | | | 54 | |
| Annual Leave | 055 | 00 | 01 | 55 | AL |
| Annual Leave Late | 055 | 09 | | | ALL |
| Annual Leave Emergency | 055 | 10 | | | EAL |
| Holiday Work | 057 | 00 | | 57 | |

| Description | TACS Hour Code | TACS Reason Code | PSDS | ETC | Abbreviation |
|---|---|---|---|---|---|
| Holiday Leave | 058 | 00 | 11 | 58 | HOL |
| Court Leave | 061 | 00 | 04 | 61 | CTLV |
| Guarantee Time | | | | 62 | |
| TE Crossfoot | | | | 63 | |
| Meeting Time | | | | 65 | |
| Convention Leave | 066 | 00 | 12 | 66 | CNVL |
| Guarantee Overtime | 068 | 00 | 07 | 68 | |
| Blood Donor Leave | 069 | 00 | 09 | 69 | BDLV |
| Stewards Duty Time | 070 | 00 | | 70 | |
| Continuation of Pay | 071 | 00 | 03 | 71 | |
| Sunday Premium | | | | 72 | |
| Out of Schedule Premium | | | | 73 | |
| Christmas Work | 074 | 00 | | 74 | |
| Non-Scheduled Cross-Foot | | | | 76 | |
| Civil Defense Leave | 077 | 00 | 16 | 77 | CDLV |
| Act of Nature Leave | 078 | 00 | 13 | 78 | ANLV |
| Natl/Local Admin Leave | 079 | 00 | 14 | 79 | ADLV |
| Relocation Leave | 080 | 00 | 15 | 80 | RLLV |
| Civil Disorder Leave | 081 | 00 | 17 | 81 | CVLV |
| Travel Within Schedule | | | | 82 | |
| Travel Outside Schedule | | | | 83 | |
| Union Official Leave | 084 | 00 | 28 | 84 | UNLV |
| Voting Leave | 085 | 00 | 18 | 85 | VTLV |
| Other Paid Leave | 086 | 00 | 10 | 86 | OTLV |
| NonBargain Reschedule Premium | | | | 88 | |
| Postmaster Org. Leave | 089 | 00 | 08 | 89 | PMLV |
| Higher Level Eligibility | | | | 90 | |
| OT Authorization | | | | 91 | |
| Disallow Guarantee Time | | | | 92 | |
| No Lunch Taken | | | | 93 | |
| Late No Leave Used | 000 | 09 | | | LATE |
| Absent from Overtime | 000 | 12 | | | AOT |
| Absent from Holiday Work | 000 | 13 | | | AHOL |

| Description | TACS Hour Code | TACS Reason Code | PSDS | ETC | Abbreviation |
|---|---|---|---|---|---|
| Family Leave Share | 045 | 00 | 045 | | |
| FMLA Annual Leave | 055 | 99 | 32 | 01 | f.AL |
| FMLA Sick Leave | 056 | 99 | 33 | 02 | f.SL |
| FMLA Cont. of Pay | 071 | 99 | 34 | 03 | f.COP |
| FMLA IOD/OWCP | 049 | 99 | 35 | 04 | f.WCP |
| FMLA LWOP Part Day | 059 | 99 | 36 | 05 | f.PLWP |
| FMLA LWOP Full Day | 060 | 99 | 37 | 06 | f.LWOP |
| FMLA Sick Leave Dep. Care | 056 | 98 | 38 | 07 | f.SLDC |
| FMLA OWCP WOP Hours | 004 | 00 | | | f.WCP |
| Sick Leave | 056 | 00 | 02 | 56 | SL |
| Sick Leave – Restricted | 056 | 11 | | | SL.r |
| Sick Leave Dep. Care | 056 | 97 | 39 | 08 | SLDC |
| AWOL | 024 | 00 | 24 | 24 | AWOL |
| OWCP LWOP Hours | 049 | 00 | 25 | 49 | OLWP |
| Partial LWOP Hours (generated by main frame when time missing for a regular employee) | 031 | 00 | | 31 | PLWP |
| Part Day LWOP | 059 | 00 | 31 | 59 | PLWP |
| PT LWOP – In Lieu of Sick Leave | 059 | 01 | 20 | | PSWP |
| PT LWOP – Proffered | 059 | 02 | 21 | | PLWR |
| PT LWOP – Personal | 059 | 03 | 22 | | PLWE |
| PT LWOP – Other | 059 | 04 | 23 | | PLWO |
| PT LWOP – Maternity | 059 | 05 | 26 | | PLWM |
| PT LWOP – Suspension | 059 | 06 | 27 | | PLWS |
| PT LWOP – Pending Termination | 059 | 08 | 29 | | PLWT |
| PT LWOP – Late | 059 | 09 | | | PLWL |
| PT Union Official Leave | 059 | 07 | | | PLWU |
| Full LWOP Hours (generated by main frame when time missing for a regular employee) | 030 | 00 | 30 | | LWOP |
| Full Day LWOP | 060 | 00 | 30 | 60 | LWOP |
| Full Time LWOP – In Lieu of Sick Leave | 060 | 01 | 20 | | SWP |

# Frequently Asked Questions

Open the RMD Home Page, http://rmdweb.usps.gov.  Click on **Online Knowledge Base/Help Desk**.  The Online Knowledge Base/Help Desk will open.

(you have to use the scroll bar in order to see all of the possible buttons)

Click **Search the PAQ (Previously Asked Questions) Database** .

Enter a key word (such as FMLA) and click **Submit** (move the scroll bar down).

A list of the previously asked questions about FMLA appears, with most of the question itself shown.

Click on the **Ticket Number** and that ticket and it's answer will appear.

Click **OK** at the bottom of the screen to return to the list of questions related to your keyword.

Click **Cancel** at the bottom of the list to return to the Search Parameter Screen.

Click **Cancel** at the bottom of the screen to return to the Main Menu.

## *Submitting a Question*

From the Main Menu, click **Open a New Ticket.**

Complete all requested information and click **Submit**.  This will forward your question to one of the RMD/eRMS experts and you will receive a cc:mail message when your question has been answered.

If you do not know your email address, click **Address Lookup**.  A new window will open.

Follow the instructions and click **Find Matching Entries**. All matching entries will appear.

Copy down **your** email address and close this window.  You can now type it into the required boxes in the Ticket.

If you need help with your login ID, click **Login Help**.  The following window will appear.  You may click the **x** to close it and return to your Ticket.

When you are finished entering your question, click **Submit**.

The turn-around for your question's answer is normally no more than 2 days.

# USER COMMENTS: eRMS User Guide, Version 3.5.1, December 2001

If you would like to comment on this guide, send or fax this form to the following:
> **Resource Management Database Project Manager**
> **HR Technology Management**
> **475 L'Enfant Plz SW**
> **Washington,  DC  20260**
> FAX **(202) 268-3109**
>
> **Or visit http://rmdweb.usps.gov**

What I like best about this guide is:

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What I like least about this guide is:

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I found the following errors in this guide (cite page number with a description of the error):

_____

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Additional comments or suggestions to improve this guide:

_____

_____

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| | |
|---|---|
| **Name and Title** | |
| **Mailing address** | |
| | |
| | |
| **Phone/FAX** | **(    )                    / (    )** |
| **Date** | |

**Enterprise Resource Management System (eRMS) User Guide, Version 3.5.1, December 2001**