

Oracle Fusion Cloud Human Resources

Administering Payroll for United States Family and Medical Leave Act

24D



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1 Family and Medical Leave Act

Overview

Federal Family and Medical Leave Act Benefits

The Family and Medical Leave Act of 1993 (FMLA) introduced the concept of protected leave in the United States. Federal FMLA designates 12 weeks of certain absences as protected leave within a year.

For details about eligibility criteria, refer to the Department of Labor website and search for FMLA.

If the employee is taking time-off to care for another person, that person must meet the relationship criteria defined by FMLA. Their relationship is referred to as a qualified relationship.

Note: Responsibility falls directly on the employee to provide their HR representative with appropriate documentation to certify their qualified relationships.

You must check that both the employee and the qualified relationships have met the requirements for federal FMLA.

Federal FMLA applies to employees who have:

- Completed one year of service with the employer.
- Worked a minimum of 1,250 hours during the 12 months prior to a request for FMLA leave

When implementing federal FMLA, you must configure the following:

- Length of service.
One year.
- Number of hours worked.
A minimum of 1,250 hours during the 12 months prior to the request for FMLA leave.

Related Topics

- [Absence Plans for FMLA Benefits](#)
- [Defining Family and Medical Leave Act Benefits: Overview](#)
- [New Jersey Family Leave Insurance](#)

State Family and Medical Leave Act Benefits

Some states have enacted laws that mandate additional family and medical leave (FMLA) for workers.

When implementing state FMLA, you must configure the following.

- Legal jurisdiction
If you're doing business in one of the participating states, refer the absence plan to the jurisdiction of the work location and the employee's home location.
- Length of service
Set the appropriate state-specific levels of service.
- Number of hours worked
Set the appropriate levels of hours worked.
- More qualified dependents
Some states extend the concept of family to include more relationships than recognized by the federal law. Responsibility falls directly on the employee to certify relationships. Administrative users must ensure that the relationships are qualified under either federal or relevant state FMLA.

Related Topics

- [Federal Family and Medical Leave Act Benefits](#)
- [Overview of Defining Family and Medical Leave Act Benefits](#)
- [Derived Factors for FMLA Benefits](#)
- [Eligibility Profiles for FMLA Benefits](#)
- [New Jersey Family Leave Insurance](#)

Overview of Defining Family and Medical Leave Act Benefits

Here's how you define absences compliant with the Family and Medical Leave Act (FMLA):

1. Define required fast formulas.
For further info, see the Fast Formulas for FMLA Benefits topic in the Help Center.
2. Define balances for FMLA hours.
For further info, see the Balances for FMLA Benefits topic in the Help Center.
3. Define derived factors.
For further info, see the Derived Factors for FMLA Benefits topic in the Help Center.
4. Define eligibility profile.
For further info, see the Eligibility Profiles for FMLA Benefits topic in the Help Center.
5. Define FMLA plans.
For further info, see the FMLA Absence Plans and Absence Types topic in the Help Center.
6. Associate the FMLA plan with absence types.
For further info, see the Absence Plans and Absence Types for FMLA Benefits topic in the Help Center.
7. Manage the absence records.
For further info, see the Record FMLA Protected Absences topic in the Help Center.

Related Topics

- [Federal Family and Medical Leave Act Benefits](#)
- [State Family and Medical Leave Act Benefits](#)

FMLA Absence Certification and Communications

Absence certification requirements are action items that workers must complete to continue receiving entitlements during an absence period.

Use them to track receipt of critical documentation.

To create certification requirements for absences:

1. From **My Client Groups**, click **Show More**.
2. Under **Absences**, click **Absence Certifications**.

For further info, see the FMLA Absence Certifications topic in the Help Center.

3. Associate the certification requirements with an absence type on the Action Items tab of the Create Absence Type page.

Absences that workers schedule using that absence type are subject to the corresponding certification requirements.

Family and Medical Leave Act (FMLA) certifications have no requirements. However, you may implement them to track your employees' submission of a doctor's certificate or other information.

Related Topics

- [Configure FMLA Absence Certification](#)

Defining Benefit Details

Fast Formulas for FMLA Benefits

When defining Family and Medical Leave Act (FMLA) absences, you must use one or more fast formulas to determine eligibility.

For example, if there is a requirement to determine the work state, you need a formula to check whether an employee works from home.

State-Level FMLA Benefits

Some states have enacted laws that mandate additional family and medical leave for workers. If you're doing business in one of these states, include reference to the jurisdiction of the work location and the employee's home location.

For further info, see Fast Formulas for State FMLA in the Help Center.

Calculating Weekly Plan Use

FMLA requires tracking the absence plan use in weeks. If you're tracking absences using days or hours, you must use a conversion formula to convert them into fraction of weeks. You must attach this conversion formula in the absence plan.

The conversion formula must perform the following calculation.

Absence Hours in a Week / Work Week Hours

For example, if the employee has taken 8 hours of sick time and they work 40-hour weeks, to convert the hours to weeks:

8 hours sick / 40 hours in a week = .2 week

The source of work week hours comes from the Working Hours on the assignment and may require conversion based on the frequency.

For further info, see Absence Plan Conversion Formula in the Help Center.

Related Topics

- [Absence Plan Conversion Formula](#)
- [Federal Family and Medical Leave Act Benefits](#)
- [State Family and Medical Leave Act Benefits](#)
- [Fast Formulas for State FMLA](#)

Balances for FMLA Benefits

Hours worked by an employee are one of the eligibility factors for the Family and Medical Leave Act (FMLA). You configure the balance for hours worked using the Balance Definitions task.

You configure a balance for hours worked before you can reference it using derived factors. Use the Derived Factors task to calculate hours worked to determine FMLA eligibility. At the Federal level, the minimum requirement for hours worked is 1,250 hours over a 12-month period. However, your company may have their own definition of hours worked.

For example, when defining balances for FMLA benefits, set these values.

Field	Description
Hours	Include hours actually worked for the employer, such as hours physically on the job. Paid leave and unpaid leave should not be included. Configure the balance for hours worked using the Balance Definitions task.
Balance Category	Select Hours .
Unit of Measure	Select one of the hourly options.

Your implementation may use a different definition of hours worked. If so, adjust the balance feeds as needed.

Balance Feeds

Configure balance feeds by balance classification. This automatically adds the feed to the **Hours** balance. Add feeds for all classifications you defined for the balance.

Note: If you select a primary classification, it includes all associated secondary classifications.

Qualified Entitlement Display by Plan

To query FMLA balances:

1. From **My Client Groups**, click **Show More**.
2. Under **Absences**, click **Absence Records**.
3. Search for and select your employee.
4. Expand **Plan Participation**.
5. View the **Qualification Entitlements** section.
6. View the **Qualification Plan Details**.

This page displays plan usage across absences. Use this page to monitor FMLA-related absences. It also notes when an entitlement has been exhausted.

Related Topics

- [State Family and Medical Leave Act Benefits](#)
- [Federal Family and Medical Leave Act Benefits](#)
- [Configure FMLA Absence Certification](#)
- [Define Balances for FMLA Hours Worked](#)
- [Create Derived Factors for FMLA](#)

Derived Factors for FMLA Benefits

You use derived factors to calculate certain eligibility criteria that change over time, such as a person's age or length of service. You can add derived factors to eligibility profiles and then associate the profiles with objects that restrict eligibility.

Hours worked and Length of Service are the two derived factors used to establish Family and Medical Leave Act (FMLA) eligibility.

Using the Derived Factors task, create these types of derived factors.

- Length of service
For protected leave entitlements, the minimum required service is 1 year. For additional info, see below.
- Hours worked
For protected leave entitlements, the minimum hours worked is 1,250 hours. For additional info, see below.

Protected Leave Entitlements

You must configure the derived factors to define employee qualifications for protected leave entitlements. The government defines conditions for protected leave entitlements. Once you have identified that an employee has met those conditions, they're entitled to qualified leave. Use the Derived Factors task to set these qualifications.

Qualification	Description
Length of service	The minimum required service is 1 year. To specify a length of service, use a derived factor on your FMLA eligibility profile.
Number of hours worked	The minimum requirement for hours worked is 1,250 hours. To specify the hours worked, use a derived factor on your FMLA eligibility profile.

See the Worked Examples in Related Links for info about how to set up balances and derived factors. Then attach the derived factors to the Eligibility Profile Definition.

FMLA also requires that the relationship meets certain criteria to be a qualified relationship. The employee is responsible for providing the appropriate documentation to the benefits or HR administrator to verify their qualified relationships.

For more info about qualifying relationships, see the Federal Family and Medical Leave Act Benefits in the Help Center.

Track Qualified Relationship Verification

You can add a certification rule to track that you have manually verified the qualified relationship. This step isn't required, but by doing so, you can track whether the documentation provided by the employee has been reviewed.

To add a certification rule:

1. From **My Client Groups**, click **Absences**.
2. Click **Absence Certifications**.
3. Click **Create**.
4. Choose **Documentation** for the classification.
5. Enter **Qualifying Relationship** as the name in **Certification Attributes**.
6. Set the status to **Active**.
7. Choose **On demand** in **Trigger in the Creation**.
8. Click **Save and Close**.
9. Attach the certification to the absence type.
For further info, see Configure FMLA Absence Certification in the Help Portal.
10. Attach the certification to the absence type.
 - a. Select **Action Items**.
 - b. Under **Certifications**, click **Qualifying Relationship**.
11. Click **Select and Add**.

Once the employee submits an absence that has this certification attached to it, you can confirm that you have received proof of the qualifying relationship. You can choose whether to enter the name of the person in the description. Adding a name to the description helps to track if there is more than one qualified relationship.

To track that you have verified the relationship:

1. In **Documentation**, click **Add**.

2. Select **Qualifying Relationship**.
3. Enter a name for **Description**, and set the status as **Confirmed**.

Related Topics

- [Eligibility Profiles for FMLA Benefits](#)
- [Federal Family and Medical Leave Act Benefits](#)
- [Create Derived Factors for FMLA](#)
- [Define Balances for FMLA Hours Worked](#)

Eligibility Profiles for FMLA Benefits

You create eligibility profiles to define criteria that different business processes use to determine whether an employee qualifies for a benefits offering.

For example, use an eligibility profile to determine whether an employee is eligible for Federal Family and Medical Leave Act (FMLA) protection. The business process of which employees are eligible for FMLA protection uses an eligibility profile of Employee Person Types.

Categories

The Eligibility Profiles task organizes eligibility profile criteria into these categories.

Category	Description
Personal	Includes gender, person type, postal code ranges, and other person-specific criteria.
Employment	Includes assignment status, hourly or salaried, job, grade, and other employment-specific criteria.
Derived factors	Includes age, compensation, length of service, hours worked, full-time equivalent, and a combination of age and length of service.
Other	Includes miscellaneous and user-defined criteria.
Related coverage	Includes criteria based on whether a person is covered by, eligible for, or enrolled in other benefits offerings.

Some criteria, such as gender, provide a fixed set of choices. The choices for other criteria, such as person type, are based on values defined in tables. You can define multiple criteria for a given criteria type.

Use the Eligibility Profiles task to add attributes to an eligibility profile.

Federal FMLA Eligibility

You must configure these attributes as part of the FMLA eligibility profile.

Value	Defining Task
Length of Service	Derived Factors
Hours Worked	Derived Factors
Person Type	Manage Employee

Note: If you require state-specific eligibility criteria, such as for lower levels of eligibility than federal, define an eligibility profile using an evaluation fast formula. Use the formula to derive the state, along with the less restrictive eligibility criteria. For example, an employee working in New Jersey may have only 1,100 work hours, so they don't meet the federal FMLA requirements. However, they would meet New Jersey's state FMLA requirements.

Plan Eligibility

You define eligibility for a plan through attributes maintained in an eligibility profile.

For FMLA eligibility, set these attributes.

Attribute	Value
Person Type	Employee

Related Topics

- [Federal Family and Medical Leave Act Benefits](#)
- [State Family and Medical Leave Act Benefits](#)

Absence Plans for FMLA Benefits

Absence plans determine how entitlements are provided to an employee, including eligibility and rates. Configurable matrixes and formulas determine the rates of accrual and entitlement.

You configure Federal Medical Leave Act (FMLA) absences using the qualification plan type of absence plan.

Use qualification plans to track actual job protection under FMLA. No accrual of time is associated with a qualification plan. With these plans, the employee's entitlement to time off isn't earned on a period basis. Entitlement is granted to them.

Note: You commonly use non-accrued plans for entitlements other than vacation, such as sickness, maternity, family leave, jury duty, and military service.

You define absence plans for the following.

- Federal FMLA

- Any state where you do business and that offers more generous FMLA provisions

Plan configuration consists of the following areas.

- Basic attributes
- Qualification plan terms
- Plan participation and entitlements

For further info, see the following sections.

Basic Attributes

Use the Absence Plans task to define the FMLA plan.

When creating your plan, enter your US legislative data group (LDG) and the Qualification plan type.

Set the following in the **General Attributes** section of the **Plan Attributes** tab.

Field name	What you enter
Plan Name	Enter a name for your plan such as FMLA Qualification.
Legislative Data Group	Select your US LDG.
Status	Select Active .
Enable concurrent entitlement	Check the check box.
Plan UOM	Select Weeks .
Conversion Formula	Required to convert work hours or days missed. Select the formula that you defined for this plan.

Qualification Plan Terms

A qualification plan term is an assessment period during which the total absent time recorded in that period must be evaluated. The absence time is considered to see if the employee qualifies or is entitled to benefits.

You must specify the type of annual period used for the evaluation of protected leave by FMLA.

You can select from the following periods in the **Plan Attributes** tab.

Period type	What this is
Absence duration	Length of the absence. The absence duration determines the qualification plan term. For example, if a worker schedules a maternity absence from January 1, 2015 to April 15, 2015, then that's the duration of the qualification plan term.

Period type	What this is
Calendar year	365 days starting on any designated day for the entire plan.
Rolling backward period	Look back one year from the end of the absence to determine how much job protection was used for each absence reported by an employee.
Rolling forward period	Establish a period from the start date of an absence and evaluate all subsequent absences for a year from that first start date.

Plan Participation and Entitlements

After setting up the basic attributes and qualification plan terms, you must define plan participation, by doing the following.

1. In **Participation**, choose the attributes relevant to your company for enrollment and termination rules for the protected leave.
2. In **Eligibility**, attach the eligibility profile to the plan.
3. Set the duration for protected leave entitlement in **Entitlements** by adding **Qualification Details**.
 - If the leave is to care for a member of the family who's active military, the duration is 26 weeks.
 - For all other types of protected leave, the duration is 12 weeks.
4. In **Entitlement Attributes**, create a matrix using 10 in sequence, 12 in duration, and 0 in payment percentage.
5. Save your work.

Related Topics

- [Federal Family and Medical Leave Act Benefits: Explained](#)
- [State Family and Medical Leave Act Benefits](#)
- [Eligibility Profiles for FMLA Benefits: Explained](#)

FMLA Absence Plans and Absence Types

You track data for Family and Medical Leave Act (FMLA) compliance at the absence plan level. You must associate every absence plan with an absence type to track the entitlement for FMLA.

FMLA Absences

The processes for viewing, editing, tracking, reporting, and otherwise managing FMLA eligible absences are the same as for any other type of absence. You use an FMLA absence plan to track FMLA-eligible absences and provide the protected status.

Your Payroll and HR departments must work together to create absences, absence plans, and absence types.

For further info, see [Setting Up Absence Elements for Oracle Fusion Absence Management \(2308118.1\)](#) on My Oracle Support.

FMLA Protected Status

FMLA dictates that an absence has protected status during time-off even when that absence affects payroll processing. For example, short-term disability (STD) or maternity leave can affect payroll processing because they may be paid absences. The FMLA absence plan running concurrently protects the status of the employee during both paid and unpaid absences.

To assign protected status to an absence, you must configure concurrent absence plans and absence types.

For example, you could set up the following plans.

- An FMLA plan to track FMLA-eligible time off
- An STD plan to track the time-off and pay STD benefits

You must configure the STD absence element in payroll and add it to the STD absence plan. The STD element is the primary source of absence info for payroll processing.

Absence Type Definition

An absence type is a grouping of absences, such as illness or personal business. They are used for:

- Reporting
- Accrual of hours reported
- Compensation calculations

For example, you can concurrently track both paid maternity leave and FMLA leave. An employee is entitled to 6 weeks paid maternity leave and 12 weeks FMLA leave. After 12 weeks the absence record would show 6 weeks paid maternity leave and 12 weeks of FMLA leave. You could also attach the FMLA plan to another plan such as a short-term disability (STD) plan.

This example assumes that you have already created your Maternity plan and your FMLA plan.

To create an absence type for maternity leave:

1. From **My Client Groups**, click **Absences**.
2. Click **Absence Types**.
3. Click **Create**.
4. Select your legislation, and specify the generic absence pattern.
5. On **Types Attribute**, enter a name for the absence, such as **Maternity Leave**, and set the status to **Active**.
6. Specify the Plan UOM as weeks.
7. Use the default values for the other fields.
8. Click **Save and Close**.

Absence Plan and Absence Type Association

You can associate multiple absence plans with an absence type, or add one absence plan to many absence types as needed. The absence plan tracks the qualified entitlement cohesively. Associating absence plans with absence types let you use different absence plan hours within the same absence type, in the priority that you indicate.

For details about creating a qualification plan, see Absence Plans for FMLA Benefits in the Help Center.

To associate two concurrent qualification plans with an FMLA absence type:

1. Start Absence Types task.
2. Search for the Maternity Leave absence type you just created and open it for editing.

3. Click **Plans and Reasons**.
4. Click **Select** and **Add**.
5. Select the maternity qualification plan, and set it to **Active** with a priority of 10.
6. Click **OK**.
7. Click **Select** and **Add**.
8. Select the FMLA qualification plan, and set it to **Active** with a priority of 20.
9. Click **OK**.
10. Save your work.

Related Topics

- [Federal Family and Medical Leave Act Benefits](#)
- [Absence Plans for FMLA Benefits](#)

Record FMLA Protected Absences

Your recording of Family and Medical Leave Act (FMLA) protected absences involves:

- Supporting employee absences
- Using accrual balances before initiating FMLA protection

Supporting Absences

FMLA legislation protects the employee's job during the absence.

An employee can report the time covered under FMLA as one of the following.

Absence type	What this means	How you support it
Intermittent absence	The employee takes time off sporadically. When an employee takes an intermittent absence, they take blocks of time that are less than the full amount of their total entitlement. Also known as reduced schedule leave.	You can record absences daily or as scheduled. • Daily The employee works reduced hours on a regular basis. • Scheduled The employee schedules the hours that they take off as an absence. For FMLA compliance, you ensure that employees schedule hours on specific dates for intermittent absences. For example, "every Monday for 2 hours". Or a person may know that they have a doctor's appointment on a specific date.

Absence type	What this means	How you support it
		Note: Employees can't schedule hours that aren't associated with specific dates. For example, "20 hours between September 2 and September 30" isn't a valid intermittent absence. In this case, you must ensure that employees schedule the hours to be on specific dates.
Continuous absence	No work is performed during the uninterrupted absence.	You can group related absences, such as absences due to long-term illness. This helps you concurrently track the time to pay benefits and to monitor FMLA qualification status. Use the FMLA absence plan to associate multiple absences, including those of different types. For further info, see FMLA Absence Plans and Absence Types in the Help Center. Note: The initial entitlement calculation doesn't use the estimated end date for qualification absences like long-term illness. The calculation is based on 365 days. The actual end date causes the entitlement to be recalculated.

Using Accrual Balances Before Initiating FMLA Protection

If you require your employees to use some of their vacation or sick leave prior to initiating FMLA leave, use two absence plans. Do not add them to the same absence type.

For example, if you require an ill employee to use part of their vacation before initiating FMLA protection, you must have two absence plans.

- One to record the vacation time
- One to initiate the FMLA absence

These two absence plans aren't associated with each other. Associate each plan with their own absence type to keep them separate. One tracks FMLA time, and the other tracks and pays the benefits, if applicable. Once the vacation time is used, then manually start the FMLA absence plan. The enforcement of such a policy is a manual process and is your responsibility.

Related Topics

- [FMLA Absence Certification and Communications](#)
- [FMLA Absence Plans and Absence Types](#)
- [Configure FMLA Absence Certification](#)

Examples

Configure FMLA Absence Certification

Here's how to configure a Family and Medical Leave Act (FMLA) absence certification. It requires the employee to submit a doctor's certificate to the manager within 14 calendar days of their absence start date.

Absence Certification Requirement

To create a certification requirement for an absence:

1. From **My Client Groups**, click **Absences**.
2. Click **Absence Certifications**.
3. In **Creation**, set the **Trigger** to **On absence submit**.
4. In **Passage of Due Date**, set **Due Date Rule** to **Calculate date**.
5. Set **Reference Date** to **Absence start date**.
6. Set **Duration** to 14, and **UOM** to **Calendar days**.
7. Click **Save and Close** when you are finished.

Associate Certification with Absence Type

1. Associate the certification requirement with an absence type on **Action Items** of the Create Absence Type page.
2. Search for and select the absence type you previously defined.
3. Click **Actions**, and under **Certifications**, click **Select**.
4. Click **Add**.
5. Select the certification you previously defined in **Name**.
6. Click **OK**.
7. Click **Save** and **Close**.

Related Topics

- [Absence Plans for FMLA Benefits](#)
- [FMLA Absence Certification and Communications](#)
- [Define Balances for FMLA Hours Worked](#)

Fast Formulas for State FMLA

Some states have passed their own state-specific Family and Medical Leave Acts (FMLA). In these states, employers are obligated to provide employees with the maximum benefit between the two acts.

These formulas determine which benefit you should use. Choose the formula that best applies to the product and configuration you're using. To use one of these formulas, you must copy and paste it into a new formula.

To use the templates in this topic:

1. Define a formula.

- a. From **My Client Groups**, click **Show More**.
 - b. Under **Payroll**, click **Fast Formulas**.
 - c. Click **Create**.
 - d. Enter a name for your formula.
 - e. Enter a name for your formula.
 - f. Select **Participation and Rate Eligibility** for the formula type.
 - g. Copy and paste the appropriate formula from one of the sections that follow.
 - h. Click **Submit**.
 - i. Compile your formula.
2. Attach it to an eligibility profile.
 - a. From **My Client Groups**, click **Show More**.
 - b. Under **Absences**, click **Eligibility Profiles**.
 - c. Click **Create Participant Eligibility Profile**.
Or search for and select an eligibility profile.
 - d. Select **Other** in **Eligibility Criteria**, then select **Formula**.
 - e. Attach the formula.
3. Attach the profile to an absence plan:
 - a. From **My Client Groups**, click **Show More**.
 - b. Under **Absences**, click **Absence Plans**.
 - c. Search for the absence plan, and select it.
 - d. Select **Participation**, and enter the eligibility profile that includes the fast formula.

HR-Only Customers Not Using Address Overrides

This formula checks whether the employee is a home-worker. If yes, the residence state is used for benefits. If not, the work state is used.

This formula applies when you:

- Use the Human Resources or None product extension and aren't maintaining tax cards for employees.
- Choose not to use the state from the tax card.
This formula prevents the retrieval of state information from the tax card.
- Don't use address overrides.

Note: This formula is for the work states of CT, NJ, and DC. If you require a different or additional state, adjust the IF statement accordingly. This formula is supported for Release 12 and later.

```
/* DEFAULTING OF DBIs */
/* DBI to get State from Location Address */
DEFAULT FOR PER_ASG_LOC_REGION2 is ' '
/* DBI to get State from Resident Address */
DEFAULT FOR PER_ASG_ADD_REGION2 is ' '
/* DBI if employee work from home */
DEFAULT FOR PER_ASG_WORK_AT_HOME is 'N'
/* DEFAULTING OF LOCAL VARIABLES */
ELIGIBLE= 'N'
l_log = ESS_LOG_WRITE('PER_ASG_ADD_REGION2='||PER_ASG_ADD_REGION2)
```

```
l_log = ESS_LOG_WRITE('PER_ASG_LOC_REGION2='||PER_ASG_LOC_REGION2)
/* Check if the person is working from home. If the person is working from home, use the state of the
home, resident address else use work address
*/
if PER_ASG_WORK_AT_HOME = 'Y' THEN
(
if (PER_ASG_ADD_REGION2 = 'CT' or PER_ASG_ADD_REGION2 = 'NJ' or PER_ASG_ADD_REGION2 = 'DC') THEN

    ELIGIBLE= 'Y')
else
(
IF (PER_ASG_LOC_REGION2 = 'CT' or PER_ASG_LOC_REGION2 = 'NJ' or PER_ASG_LOC_REGION2 = 'DC') THEN
ELIGIBLE= 'Y'
)
)
return ELIGIBLE
```

HR-Only Customers Using Address Overrides

Set up address overrides at either the employee's assignment or the location. The following formula first checks if an override exists for either case. If an override exists, that state is used. Otherwise, the formula continues with the same processing as the previous formula. It checks whether the employee is a home-worker. If yes, the residence state is used for benefits. If not, the work state is used.

This formula is used when you:

- Use the Human Resources or None product extension and aren't maintaining tax cards for employees.
- Choose not to use the state from the tax card.
This formula is how you override the state from the tax card.
- Are using address overrides.

Note: This example is for the work states of CT, NJ, and DC. If you require a different or additional state, adjust the IF statement accordingly. This formula is supported for Release 12 and later.

Set up assignment address overrides in the Manage Employment task as a **Work Tax Address**.

Use the Locations task to set up location address overrides. You must create the location before you can set up the override.

To add a location override address:

1. In **My Client Groups**, click **Workforce Structures**.
2. Under **Locations**, click **Locations Details**.
3. Select the address you want to override and edit it using either **Update** or **Correct**.
4. Click **Edit Location**.
5. Click **Add Another Address**.
6. In **Other Address**, set the address type to **Location Override**.
7. Enter the override address, and click **OK**.
8. Click **Save**.

```
/* Formula for Overrides when Address is not found at different levels */
DEFAULT FOR PER_PERSON_ADD_USAGE_ADDRESS_ID IS 0
DEFAULT FOR PER_ADD_REGION1 IS 'INVALID'
DEFAULT FOR PER_ADD_REGION2 IS 'INVALID'
DEFAULT FOR PER_ADD_ADDL_ATTR4 IS 'INVALID'
DEFAULT FOR PER_ADD_TOWN_OR_CITY IS 'INVALID'
DEFAULT FOR PER_ADD_POSTAL_CODE IS 'INVALID' DEFAULT FOR PER_ASG_TAX_ADDRESS_ID is -1
```

```
DEFAULT FOR hr_asg_id IS 0
DEFAULT FOR PER_ASG_LOCATION_ADD_USAGE_ADDRESS_ID IS -1
DEFAULT FOR PER_ASG_ADD_REGION2 IS 'INVALID'
DEFAULT FOR PER_ASG_WORK_AT_HOME IS 'INVALID' ELIGIBLE= 'N'
l_state= ' '

1 PER_ASG_TAX_ADDRESS_ID = PER_ASG_TAX_ADDRESS_ID
IF PER_ASG_TAX_ADDRESS_ID was not defaulted THEN
(
  CHANGE_CONTEXTS (ADDRESS_ID = 1_PER_ASG_TAX_ADDRESS_ID)

  (
    l_state = PER_ADD_REGION2
  )
)
ELSE
(
  CHANGE_CONTEXTS ( ADDRESS_TYPE = 'US_LOC_OVERRIDE')
(
  IF PER_ASG_LOCATION_ADD_USAGE_ADDRESS_ID was not defaulted THEN
  (
    CHANGE_CONTEXTS (ADDRESS_ID = PER_ASG_LOCATION_ADD_USAGE_ADDRESS_ID, ADDRESS_TYPE = 'US_LOC_OVERRIDE')
    (
      l_state = PER_ADD_REGION2
    )
  )
)
ELSE
(
  IF l_state = ' ' THEN
  (
    CHANGE_CONTEXTS (ADDRESS_ID = PER_ASG_LOCATION_ADD_USAGE_ADDRESS_ID, ADDRESS_TYPE = 'MAIN')
    (
      l_state = PER_ADD_REGION2
    )
  )
)
)
if l_state <> ' ' then (
if PER_ASG_WORK_AT_HOME='Y' THEN
(
  CHANGE_CONTEXTS (ADDRESS_TYPE='HOME')
  (
    if PER_ASG_ADD_REGION2 was not DEFAULTTED THEN
    (
      if (PER_ASG_ADD_REGION2 = 'CT' or PER_ASG_ADD_REGION2 = 'NJ'
        or PER_ASG_ADD_REGION2 = 'DC')
      THEN
      )
    )
  )
  CHANGE_CONTEXTS (ADDRESS_TYPE='MAIN')
  (
    if PER_ASG_ADD_REGION2 was not DEFAULTTED THEN
    (
      if PER_ASG_ADD_REGION2 was not DEFAULTTED THEN
```



```
(

if (PER_ASG_ADD_REGION2 = 'CA' or PER_ASG_ADD_REGION2 = 'NJ'
or PER_ASG_ADD_REGION2 = 'DC') THEN

ELIGIBLE='Y'
```

```
)
)
)
)

else (

if ( l_state = 'CA' or l_state = 'NJ' or l_state = 'DC') then

ELIGIBLE='Y'

)

return ELIGIBLE
```

Payroll Customers

This formula retrieves the state for benefits from the employee's tax card.

Use this formula if you:

- Use the Payroll product extension
- Maintain tax cards for employees

Note: This example uses the state of CA where the state code value of SDI_STATE referenced in the formula is **5**. If you require a different or additional state, adjust the statements accordingly. You must create the formula using a US LDG.

```
DEFAULT_DATA_VALUE FOR
US_EMPLOYEE_WITHHOLDING_CERTIFICATE_DIR_CARD_DIR_CARD_ID is -1
/* Disability State */
DEFAULT FOR US_WTH_TAXATION_HRX_US_WTH_TAXATION_SDI_STATE is ' '
DEFAULT FOR US_WTH_TAXATION_HRX_US_WTH_TAXATION_DEFAULT_SDI_STATE is ' '
DEFAULT_DATA_VALUE FOR US_W4_TAXATION_CTX1 is ' '
ELIGIBLE = 'N'
SDI_STATE='NONE'
L_TRU = '0'
l_found = 'FALSE'
/* DBI need context of effective date and payroll relationship ID */
IF US_EMPLOYEE_WITHHOLDING_CERTIFICATE_DIR_CARD_DIR_CARD_ID.EXISTS(1) THEN
  l_w4_card_id = US_EMPLOYEE_WITHHOLDING_CERTIFICATE_DIR_CARD_DIR_CARD_ID[1]
else
  l_w4_card_id = -1
IF l_w4_card_id <> -1 THEN
(
CHANGE_CONTEXTs (DEDUCTION_CARD_ID = L_W4_CARD_ID)
(
I = US_W4_TAXATION_CTX1.FIRST(-1)
WHILE US_W4_TAXATION_CTX1.EXISTS(I)
LOOP
(
L_TRU = US_W4_TAXATION_CTX1[I]
if L_TRU<> '0' then
(
l_found = 'TRUE'
exit
)
I = US_W4_TAXATION_CTX1.NEXT(I,-1)
```

```
)
  if l_found= 'TRUE' THEN
  (
    CHANGE_CONTEXTS(TAX_UNIT_ID = TO_NUMBER(L_TRU))
  (
    IF (US_WTH_TAXATION_HRX_US_WTH_TAXATION_SDI_STATE was not Defaulted) THEN
    (
      l_log_data = ess_log_write('Enter WAS NOT DEFAULTED')
      SDI_STATE = (US_WTH_TAXATION_HRX_US_WTH_TAXATION_SDI_STATE)
    )
    ELSE
    (
      SDI_STATE = (US_WTH_TAXATION_HRX_US_WTH_TAXATION_DEFAULT_SDI_STATE)
    )
  )
  )
  )
  IF (SDI_STATE ='5') THEN
    ELIGIBLE= 'Y'
  return Eligible
```

Related Topics

- [State Codes for FMLA Fast Formulas](#)
- [Fast Formulas for FMLA Benefits](#)

State Codes for FMLA Fast Formulas

You use these state codes when referring to the SDI_STATE in the payroll formulas used for Family Medical Leave Act (FMLA) fast formulas.

Note: These states have different requirements than the federal level requiring this extra check for eligibility: California, Connecticut, Hawaii, Maine, Minnesota, New Jersey, New York, Oregon, Rhode Island, Vermont, Washington, Wisconsin, and the District of Columbia.

Geography Name	State Code
CA	5
CT	7
HI	12
ME	20
MN	24
NJ	31

Geography Name	State Code
NY	33
OR	38
RI	40
VT	46
WA	48
WI	50
DC	9

Related Topics

- [Fast Formulas for State FMLA](#)

Define Balances for FMLA Hours Worked

Here's how to define a balance used for Family and Medical Leave Act (FMLA) that's referenced in the Derived Factors task.

Use this balance to define the types of hours you want to count toward the 1250-hour threshold that determines whether an employee qualifies for FMLA. You can choose whether to include only working hours or to include holiday hours or other types of hours. The Derived Factors task uses this balance to calculate the 1250 hours.

You're responsible for setting up any balances required for FMLA, which are created using the Balance Definitions task. In this example, you're defining a balance that tracks hours for FMLA qualification. It uses the Regular and Overtime balance classifications as balance feeds. When you create an element of Regular or Overtime secondary classification, an automatic balance feed results.

Once you have created the balance, you can use it in a derived factor.

For further info, see [Create Derived Factors for FMLA](#) in the Help Center.

Specify balance feeds by classification or element.

Starting the Manage Balance Definition Task

1. From **My Client Groups**, click **Show More**.
2. Under **Payroll**, click **Balance Definitions**.
3. Click **Create** and then **Create Balance**.
4. Select your US legislative data group.
5. Click **Continue**.

Entering Balance Type Attributes

1. Enter FMLA Hours Worked as the balance name.
2. Select **Hours** for the balance category.
3. Select 8 hours as the **Unit of Measure**.
4. Click **Next**.

Entering Balance Dimension Attributes

1. Click **Select and Add**.
2. Search for the **Relationship Last 12 Months** balance dimension, and select it.
3. Click **Apply**.
4. Click **Done**.
5. Click **Next**.

Entering Balance Feeds Attributes

1. Click **Add Row** under **Balance Feeds by Classification**.
2. Select **Regular** for **Balance Classification**.
3. Select **Add** for **Add or Subtract**.
4. Repeat this process to add the **Overtime** classification.
5. Click **Submit**.
6. Click **OK**.

Related Topics

- [Balances for FMLA Benefits](#)
- [Derived Factors for FMLA Benefits](#)
- [Federal Family and Medical Leave Act Benefits](#)
- [Create Derived Factors for FMLA](#)

Create Derived Factors for FMLA

You must set up certain derived factors for Family Medical and Leave Act (FMLA) qualification rules.

Here's how to create derived factors for:

- 12-month length of service
- 1,250 number of hours worked

Note: This example assumes that you have previously defined a balance named FMLA Hours Worked that tracks FMLA hours. For further info, see [Define Balances for FMLA Hours Worked](#) in the Help Center.

Length of Service

To define the length of service:

1. From **My Client Groups**, click **Absences**.

2. Click **Derived Factors**.
3. Click **Length of Service**.
4. Click **Create**.
5. Enter **FMLA Length of Service** as the name.
6. Select **Months** as the unit of measure.
7. Enter 12 in **Greater than or Equal to Length of Service**.
8. Select **Date of Hire** as the period start date rule.
9. Select **As of event date** as determination rule.
10. Click **Save and Close**.

Hours Worked

To define the balance of hours worked:

1. From **My Client Groups**, click **Absences**.
2. Click **Derived Factors**.
3. Click **Hours Worked**.
4. Enter **FMLA Hours Worked** as the name.
5. Select **Defined Balance** as the source.
6. Select the FMLA Hours Worked balance as the defined balance.
7. Enter 1250 in **Greater than or Equal to Hours Worked**.
8. Select **End of Previous Year** as the determination rule.
9. Click **Save and Close**.

Related Topics

- [Derived Factors for FMLA Benefits](#)
- [Balances for FMLA Benefits](#)

Absence Plan Conversion Formula

You can create a conversion formula for cases where you track absence time using a different unit of measure. For example, you can convert hours to weeks or fractions of a week.

In such a case, it performs this calculation.

Absence Hours in a Week / Work Week Hours

For example, if the employee has taken 8 hours of sick time and the employee's hours in the work week are 40, then the following calculation occurs to convert the hours to weeks:

8 hours sick / 40 hours in a week = .2 weeks

In this case, the source of work week hours comes from the Working Hours on the assignment and may require conversion based on the frequency.

Create the Plan

If you require a conversion formula, use the Fast Formulas task to create one similar to this.

```
DEFAULT FOR IV_START_DATE IS '4712/12/31 00:00:00' (date)
DEFAULT FOR IV_END_DATE IS '4712/12/31 00:00:00' (date)
DEFAULT FOR IV_START_TIME IS '00:00'
```

```
DEFAULT FOR IV_END_TIME IS '23:59'
DEFAULT FOR IV_START_DURATION IS 0
DEFAULT FOR IV_END_DURATION IS 0
DEFAULT FOR IV_TOTAL_DURATION IS 0
DEFAULT FOR PER_ASG_STANDARD_WORKING_HOURS IS 0
DEFAULT FOR PER_ASG_STANDARD_WORKING_HOURS_FREQUENCY IS 'W'
INPUTS ARE IV_START_DATE (date), IV_END_DATE (date),
IV_START_TIME(text),IV_END_TIME(text),
IV_START_DURATION(number),
IV_END_DURATION(number),IV_TOTAL_DURATION(number)
ln_duration = 0
ln_duration_mid = 0
ln_week_conversion_factor = 1
lc_frequency = PER_ASG_STANDARD_WORKING_HOURS_FREQUENCY
IF (lc_frequency = 'D')
THEN (ln_week_conversion_factor = ln_week_conversion_factor * 7)
IF (lc_frequency = 'BW')
THEN (ln_week_conversion_factor = ln_week_conversion_factor / 2)
IF (lc_frequency = 'SM')
THEN (ln_week_conversion_factor = (ln_week_conversion_factor * 24) / 52)
IF (lc_frequency = 'M')
THEN (ln_week_conversion_factor = (ln_week_conversion_factor * 12) / 52)
IF (lc_frequency = 'Y')
THEN (ln_week_conversion_factor = ln_week_conversion_factor / 52)
ln_abs_duration=IV_TOTAL_DURATION
ld_period_start_date = to_date(to_char(IV_START_DATE,'DD/MM/RRRR')||'
'||IV_START_TIME,'DD/MM/RRRR HH24:MI:SS')
ld_period_end_date = to_date(to_char(IV_END_DATE,'DD/MM/RRRR')||' '||IV_END_TIME,'DD/MM/RRRR HH24:MI:SS')
IF (ln_abs_duration =0 )
THEN
(
ln_abs_duration = GET_PAY_AVAILABILITY
('ASSIGN',
ld_period_start_date
ld_period_end_date,
'Y',
'Y',
'N',
'Y',
'H')
)
ln_total_working_hours = PER_ASG_STANDARD_WORKING_HOURS *
ln_week_conversion_factor
ln_duration_mid = ln_abs_duration/ln_total_working_hours
duration = round(ln_duration_mid,2)
RETURN duration
```

You can modify this example to meet your needs.

For further info, see [Absence Plans for FMLA Benefits](#) in the Help Center.

Attach the Formula to the Absence Plan

To attach the formula to the absence plan:

1. In **My Client Groups**, click **Absences**.
2. Click **Absence Plans**.
3. Search for and select the plan you created.
4. Select **Edit** and **Correct**.
5. Select the conversion formula from **Plan Attributes**.
6. Find your fast formula, and select it.
7. Click **Save** and **Close**.

Related Topics

- [Absence Plans for FMLA Benefits](#)