# MyPortal Checklist

## Prerequisites

The following tasks must be completed before MyPortal leave implementation can begin:

### Agency Prerequisites

#### View MyPortal Demo Video

* [MyPortal Demo Video](https://ofm.wa.gov/sites/default/files/public/articulate/itsystems/myportal/MyPortalEmployeeOverview/story.html)

#### Review Leave Request Implementation Strategy

* [Leave Request Implementation Strategy](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/MyPortal_LeaveRequestImplementationStrategy.docx)

#### Evaluate Business Processes and Agency Readiness

* [Review agency leave policies and procedures to ensure the policies and procedures support MyPortal. Your review may include:](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/MyPortal_LeaveRequestImplementationStrategy.docx)
  + [Will all leave be processed in MyPortal – if not how will the agency process the exceptions?](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/MyPortal_LeaveRequestImplementationStrategy.docx)
  + [How will the agency ensure leave is taken in the order required by agency policy or collective bargaining agreement?](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/MyPortal_LeaveRequestImplementationStrategy.docx)
  + [Are there any Union requirements regarding leave to consider business processes for?](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/MyPortal_LeaveRequestImplementationStrategy.docx)
  + [If LWOP is processed in MyPortal how will monitoring for retro LWOP activity occur?](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/MyPortal_LeaveRequestImplementationStrategy.docx)
  + [Are there processes in place to ensure leave requests are submitted and approved timely?](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/MyPortal_LeaveRequestImplementationStrategy.docx)
  + [How does the agency’s current business processes compare to the functionality of MyPortal? Will you need to make business process changes?](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/MyPortal_LeaveRequestImplementationStrategy.docx)
* [If applicable, contact OFM State HR Labor Relations to meet bargaining obligations. Things to consider may include:](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/MyPortal_LeaveRequestImplementationStrategy.docx)
  + [How will requests more than 12 months in the future be handled?](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/MyPortal_LeaveRequestImplementationStrategy.docx)

#### Update Organizational Structure - User Procedures

* [[Leave Approval Reporting Structure](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/MyPortal_LeaveRequestImplementationStrategy.docx)](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/Leave-Approval-Reporting-Structure.docx)
* [[Multi-Filled Chief Position](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/MyPortal_LeaveRequestImplementationStrategy.docx)](https://support.hrms.wa.gov/multi-filled-chief-position-copy-and-update-record)
* [Relationships – Supervisor Position to Subordinate Position](https://support.hrms.wa.gov/relationships-%E2%80%93-supervisor-position-subordinate-position-create-new-record)
* [[Position Org Unit Chief](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/MyPortal_LeaveRequestImplementationStrategy.docx)](https://support.hrms.wa.gov/create-position-org-unit-manages-chief-relationships-ess)
* [[Organizational Unit Create](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/MyPortal_LeaveRequestImplementationStrategy.docx)](https://support.hrms.wa.gov/sites/default/files/public/PDFProcedures/org_unit_create.pdf)
* [[Position - Maintain Position to Position Relationship](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/MyPortal_LeaveRequestImplementationStrategy.docx)](https://support.hrms.wa.gov/sites/default/files/public/PDFProcedures/Position_Maintain_Position_to_Position_relationship.pdf)
* [[Position to Organizational Unit - Maintain](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/MyPortal_LeaveRequestImplementationStrategy.docx)](http://support.hrms.wa.gov/sites/default/files/public/PDFProcedures/Position_to_OrgUnit_Maintain.pdf)
* [[Vacant Chief Position](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/MyPortal_LeaveRequestImplementationStrategy.docx)](http://support.hrms.wa.gov/ess-vacant-chief-position-ess)
* [Position - Identify Position to Position Relationships](http://support.hrms.wa.gov/position-identify-position-position-relationships)

#### Validate Emails

* Validate that all employees have a valid work email address.
  + Run the Flexible Employee Data Report - [Flexible Employee Data Report](https://support.hrms.wa.gov/report-procedures/flexible-employee-data-report)

#### Complete and Submit Request for MyPortal Leave Implementation

* Request for [MyPortal Leave Implementation](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/MyPortalImplementationRequest.docx)

#### Provide Agency Leave Administrators email distribution list to [OFM Help Desk](mailto:heretohelp@ofm.wa.gov)

* This distribution list will be used by the system to email MyPortal Posting Error email notifications. The list must include appropriate personnel such as, agency payroll staff, agency HR staff or agency attendance keepers based on agency business procedures.

### HRMS Technical Team Prerequisites

#### Conduct a Quality Assurance on Agency Organizational Structure

## Implementation

Completed during MyPortal leave implementation:

### Agency Implementation

#### Identify Approvers and Leave Request Administrators

* Update the Security Spreadsheet with the Agency Approvers (Chiefs).
* Update the Security Spreadsheet with the Leave Administrators *(Note: Leave Administrators must have Time & Attendance Processor Roles).*
  + Leave Request Administrator responsibilities include:
    - Verifying the accuracy of MyPortal leave data
    - Identifying MyPortal leave posting errors
  + [Security Spreadsheet](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/Security_Spreadsheet_update_Final.xlsx)

#### Validate Readiness

* Implement Communication Plan
* Completed Training

### HRMS Implementation

#### HRMS Technical Team Initiates and Executes System Change Request

* Configuration to Add Agency
* Add Security for Agency

## Post Implementation

Completed after the implementation:

### Agency Post Implementation

#### Validate MyPortal

* Complete validation steps and notify the [OFM Help Desk](mailto:HereToHelp@ofm.wa.gov)