# MyPortal LEAVE Implementation Strategy

State of Washington

Office of Financial Management

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Introduction

The purpose of this document is to outline the implementation strategy for deployment of MyPortal leave to agencies. MyPortal leave is an application designed for leave request processing and posting. It is not a method for collecting time, but rather a web interface for employees to request time off (i.e. vacation, sick, etc.) and managers to approve that leave. Approved leave requests are automatically posted directly into HRMS with no additional manual entry required.

## HOW MYPORTAL LEAVE WORKS

### Employees

* Access MyPortal leave through the [MyPortal](https://myportal.wa.gov/) application.
* View real time leave balances.
* Submit a leave request that spans a range of dates for full days or individual dates for partial day requests. Cannot submit leave if request exceeds available leave balance.
* Submitted leave request is automatically routed to supervisor for approval which will appear in the supervisor’s MyPortal Inbox as well as email notification.
* Submitted leave requests may be changed or deleted.

### Supervisors

* Access MyPortal leave through the [MyPortal](https://myportal.wa.gov/) application.
* Approve/reject employee leave requests from the MyPortal Inbox.
* If employee leave overlaps, view the overlap calendar to see where leave overlap occurs.
* Upon Supervisor approval or rejection processing, an email notification is sent to the employee’s email address in MyPortal and the employee’s leave request status is updated in MyPortal.
* Submit/approve leave requests on behalf of your employees when necessary.

### Leave Request AdministratorS

* This role is assigned in HRMS.
* Run reports in HRMS to view the status of leave requests submitted in MyPortal.
* Receive notifications via email if there are errors when posting leave so they can be researched.

## DECISIONS AND CONSIDERATIONS WHEN IMPLEMENTING MYPORTAL LEAVE

### Organizational Structure

* Agencies must review their Organizational Structure in HRMS and ensure the correct reporting relationships are set up.
* An agency’s Organizational Structure should be set up the same as its leave reporting structure.
* For Multi-filled leave approver positions, refer to [multi-filled chief position user procedure](https://support.hrms.wa.gov/sites/default/files/public/PDFProcedures/Multi-FilledChiefPosition-CopyUpdateRecord.pdf) to assign the correct employee as the chief leave approver.

### Employee Email Address

* It is highly recommended that all employees have an email address on file in HRMS.
* This email address is used for single signon, password resets and leave request processing notifications.
* If an agency has any employees who do not have a work email address, the agency will need to determine an internal business process to notify employees of the status of a leave request.
* Note: Employees have the ability to change their email address in MyPortal which will update their email address in HRMS. You may want to consider communicating agency policies to employees making changes to email in MyPortal.

### Work Schedules

* It is the agency’s responsibility to ensure the employee’s work schedules are accurate in HRMS.
* MyPortal uses the work schedule in HRMS to validate the employee does not request leave that exceeds their scheduled work day or on a day off.
* For salaried employees with a valid work schedule in HRMS, MyPortal knows when a scheduled holiday occurs and prevents a leave request for the holiday to be submitted.
* For a leave request that crosses over a holiday, separate requests are required for the days before and after the holiday.
* Employees with 24/7 work schedules must submit a separate request for EACH DAY of leave taken. If an employee's shifts cross over days (i.e. 10:00 p.m. - 7:00 a.m.), two leave requests must be submitted for one shift.
* Adding work schedules is not included in the MyPortal leave implementation. Submit a ticket to the [OFM Help Desk](mailto:HereToHelp@ofm.wa.gov) to request work schedules.

### Leave Types Available in MyPortal

* Most leave types are configured in MyPortal.
* Agencies can choose to process any leave type outside MyPortal but will need to manage them with a manual process.

### Payroll Offices

* Payroll Offices will not have the ability to review and correct leave requests submitted using MyPortal prior to their posting to HRMS.
* Absences entered outside of MyPortal can be displayed in MyPortal but cannot be changed or deleted in MyPortal.

### Agency Leave Administrators Email Distribution List

* 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.

### Agency Leave Policies

* Agencies with Represented employees should review bargaining agreements and may need to manually manage employee leave requests in cases where bargaining rights exceed what the system allows.
* Requests submitted through MyPortal automatically post to HRMS upon approval with no payroll intervention point.
* Supervisor training on agency leave policy and CBA’s may be needed to ensure compliance for approved leave requests for employees.

### Leave Processes

* Using MyPortal leave will require an update to the agencies’ leave processes.
* New procedures may result in new roles and/or responsibilities for affected personnel.

### GAP 1

* Agencies that currently submit leave using GAP1 (Time and Leave interface) can opt to switch to MyPortal leave.
  + Once employees start to enter leave using MyPortal, the agency should not send leave data through GAP1 as there is a risk of overlaying leave data.
* Agencies can still submit time worked entries using GAP1.

### Security

Security for MyPortal is an extremely important element of this Implementation strategy. Without proper security, employees and managers will not be able to request leave and approve the requested leave. The following security steps are the most effective and efficient way to collect and deploy security:

* Agency executes the [Staff Assignments report (S\_AHR\_61016503)](https://support.hrms.wa.gov/om-staffing-assignments) and selects the layout O-S-P-CH to verify the Chief assignments are correct.  You can use this report to fill out the Security Spreadsheet.
* Agency fills out the [security spreadsheet](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/Security_Spreadsheet_update_Final.xlsx) identifying the leave approvers (chiefs) and leave administrators and sends to the [OFM Help Desk](mailto:HereToHelp@ofm.wa.gov) no later ***than 30 days*** prior to the MyPortal leave implementation date.
* Once the security spreadsheet has been submitted to the [OFM Help Desk](mailto:HereToHelp@ofm.wa.gov) **it is important the agency does not make any additional changes to the organizational reporting structure**.

## Change Management Strategy

The Change Management Strategy for MyPortal leave implementation is made up of three core elements:

* Identifying the Agency Business Team and/or Change Agent(s)
  + For more information on the Agency Business Team and/or Change agent(s) roles see [Implementation Team](#_IMPLEMENTATION_TEAM)
* Establishing and executing an effective communication plan
* Delivering a training plan that will support the Go-live effort and continuous improvement

The following sections outline the Change Management Strategy, guidelines, and the importance these steps have on implementation.

## IDENTIFY AGENCY BUSINESS TEAM AND CHANGE AGENT(S)

Identifying the Agency Business Team and Change Agent(s) is a major task for this change management strategy. The MyPortal Leave Implementation Request form will capture the Agency Business Team and Change Agent(s) to ensure the successful implementation of MyPortal leave. The Agency Business Team and Change Agent(s) will support MyPortal leave implementation and:

* Act as the ultimate owner(s) and agency decision-maker(s) of the implementation
* Maintain the final authority for agency implementation
* Promote MyPortal leave throughout the agency

## ESTABLISH AND EXECUTE AN EFFECTIVE COMMUNICATION PLAN

The purpose of the communication plan is to ensure effective and efficient continuous information sharing on all aspects of the implementation. Effective communication is the key to successfully deploying initiatives such as MyPortal leave. The Agency Business Team/Change Agent(s) may develop a variety of communication methods (i.e. MyPortal website, broadcast emails, agency intranet, etc). Various milestones and achievements of the implementation may also be communicated.

### Communication Timeline and Goals

The proposed communication timeline may take place over a 3 - 5 month period.

* ***First Month:*** the agency reviews the implementation material on the [MyPortal website](https://ofm.wa.gov/it-systems/myportal). The duration of this task will vary depending on the amount of time the agency needs to review and complete the prerequisite packet.
* ***2nd - 3rd Month:*** the agency will receive the implementation date and will start communicating to the agency users the new MyPortal leave application will be deployed, the changes that will be coming, and any other pertinent information.
* ***30 days Prior:*** the agency will send out the implementation date to agency users to prepare for the cut-over to the new leave tool.
* ***One week Prior:*** the agency will send out a reminder email of the implementation date and links to training and FAQs,
* ***Implementation Date:*** the agency will send out the communication that MyPortal leave is available.

Communication guidelines and goals

* Understand and manage the expectations of end users
* Communicate frequently and early
* Target communications for specific user groups
* Make responses to questions, concerns, or comments timely and appropriate
* Provide a means for end users to ask questions of and provide feedback to the agency

## DELIVER A TRAINING PLAN

The purpose of the agency Training Plan is to provide training to end-users. The Agency Training Plan may include help documents from the MyPortal website, on-line training documentation, FAQs, and demonstration videos. The detail and amount of training will depend on the complexity of the agency’s business processes and demographics (i.e. size, represented, non-represented).

Agencies should ensure their Help Desks, technical support teams, and HR personnel are informed and equipped to provide support during and after implementation.

## IMPLEMENTATION STRATEGY

### PURPOSE

This implementation strategy will encompass all activities and tasks aimed at assisting the agencies in implementing the new MyPortal leave functionality. A structured implementation process and an effective change management approach is critical to the success of MyPortal leave.

### APPROACH

The implementation strategy will focus on a two-phased approach to the implementation of MyPortal leave.

Phase 1: Preparation for the new tool, including:

* Setting up the agency organizational structure
* Evaluating agency business processes around leave requests and approvals
* Evaluating agency readiness

Phase 2: Technical Preparation for the agency to use MyPortal leave. The completion of this phase will follow the OFM release management practices which include the determination of an actual implementation date.

### IMPLEMENTATION TEAM

The implementation team is designed to ensure the successful implementation of MyPortal leave.

The team will consist of:

* Agency Business Team and/or Change Agent(s): representatives from the requesting agency’s HR and Payroll staff and designated Change Agent(s)
* OFM Business Analyst
* OFM HRMS Technical Team

**Roles and Responsibilities**

The following roles and responsibilities make up MyPortal leave Implementation Team:

|  |  |
| --- | --- |
| **Role** | **Responsibilities** |
| **OFM Central Business Owner** | * Statewide MyPortal Leave Request Business Process Owner * Provide input for agency prioritization * Ensure enterprise process and standards are adhered to * Promote MyPortal benefits and usage |
| **Agency Business Team and/or Change Agent(s)** | * Assess agency readiness * Collect agency data (i.e. Data Form, Checklist, etc.) * Provide guidelines and guidance for change management * Define project Milestones and checkpoints * Manage agency's implementation plan * Conduct production validation * Oversee and manage the agency training plan |
| **OFM Business Analyst** | * Drive technical implementation * Coordinate Go-Live date * Act as the liaison between OFM HRMS Technical Team and Agency Business Team/Change Agent(s) * Quality check agency organizational structures |
| **HRMS Technical Team** | * Create change request * System configuration * Unit testing * QA Testing * Pre-release production validation * Security role assignments * Security support during and after Go-Live |

### IMPLEMENTATION PROCESS

The implementation process for the release of MyPortal is outlined below.

**1. Complete MyPortal Agency Checklist**

Agency will complete the [MyPortal Agency Checklist](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/AgencyChecklist.docx). The checklist includes all the prerequisites that must be met prior to requesting implementation.

**2. Send Completed MyPortal Leave implementation Request to the OFM Help desk**

The Agency will send the completed [MyPortal Leave Implementation Request Form](https://ofm.wa.gov/sites/default/files/public/itsystems/myportal/MyPortalImplementationRequest.docx) to the [OFM Help Desk](mailto:HereToHelp@ofm.wa.gov). This form will identify the Agency Business Team and/or Change Agent(s) and must be signed by the agency’s Director or Deputy Director. It may be electronically scanned and returned via email or a hard copy may be sent to the mailstop provided on the request form.

**3. Log Ticket**

The OFM Help Desk will receive the signed MyPortal Leave Implementation Request form, open a ticket, and assign it to an OFM Business Analyst.

**4. Review Organization Structure**

The OFM Business Analyst starts the review of the agency Organizational Structure. If there are any questions and/or issues they will reach out to the requestor directly to complete the prerequisites.

The OFM Business Analyst will complete the QA review and update the ticket to indicate the agency has completed the Organizational Structure and is cleared to move to the next step.

**5. Review Agency Information**

The OFM Business Analyst will review all the required documents from the checklist for completeness. If any of the documents have not been completed, the requestor will be contacted.

Once the required documentation is complete, the OFM Business Analyst will assign the ticket to the OFM HRMS Technical Team

**6. Create the Change Request**

The OFM HRMS Technical Team will create a Change Request. Any agency specific considerations for determining implementation date will be notated and an implementation date will be provided to the OFM Business Analyst.

**7. Send implementation Date to Agency**

The OFM Business Analyst will notify the Agency Business Team and/or Change Agent(s) of the implementation date.

**8. Review and Communicate the Agency implementation plan**

The Agency Business Team and/or Change Agent(s) will review their cut-over plan (including the validation process). Based on the release timeline, the agency will communicate their implementation and training plan to their employees.

**9. Implementation and Production Validation**

Upon agency MyPortal Leave implementation, the HRMS Technical Team will conduct a production validation and notify the OFM Business Analyst of success. The OFM Business Analyst will contact the Agency Business Team and/or Change Agent(s) to perform production validation and agency cut-over activities.