

## INSTRUCTIONS FOR COMPLETING FMLA TRACKER

*This tracker will automatically perform calculations once, will not allow the balance to fall below zero, and will automatically rebank hours.*

1. Access a copy of the FMLA Tracker and save as a new document.
2. Complete Rows 3 and 4 of the Tracker.

**Note:** If the staff member is less than a 1.0 FTE, enter that in Cell D3. The Tracker will automatically change the total number of hours a staff member is entitled to in a 12-month period. (For example, if the staff member is a .75 FTE (works 30 hours per week), that should be entered in Cell D3. The number of available hours in Cell D6 will automatically change to 360.)

3. The first time this Tracker is used, if the staff member used any FMLA in the preceding 12 months, it will be necessary to do the following:
  - Enter the total number of hours used in the preceding 12 months in Cells E3 and B7.
  - In order for rebanking to occur, it will be necessary to manually enter the dates when those hours will rebank in the upcoming 12 months by entering those hours in Column C on the one year anniversary of when the hours were taken.

*Here's an example:*

- Assume today is April 1, 2019 and the staff member is beginning a new FMLA today.
- During the preceding 12 months, from April 1, 2018 to March 31, 2019, the staff member used FMLA as follows:

Date	Hours Taken	Rebanked Hours
Thursday, July 12, 2018	8	
Friday, July 13, 2018	8	
Saturday, July 14, 2018		
Sunday, July 15, 2018		
Monday, July 16, 2018	4	
Tuesday, July 17, 2018		
Wednesday, July 18, 2018		
Thursday, July 19, 2018	3	
Friday, July 20, 2018		
Saturday, July 21, 2018		
Sunday, July 22, 2018		
Monday, July 23, 2018		
Tuesday, July 24, 2018		
Wednesday, July 25, 2018	8	
Thursday, July 26, 2018	8	
Friday, July 27, 2018	8	

- Enter in Column C of the Tracker the amount of leave taken on that date during the preceding 12 months as follows:

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Date	Hours Taken	Rebanked Hours
Friday, July 12, 2019		8
Saturday, July 13, 2019		8
Sunday, July 14, 2019		0
Monday, July 15, 2019		0
Tuesday, July 16, 2019		4
Wednesday, July 17, 2019		0
Thursday, July 18, 2019		0
Friday, July 19, 2019		3
Saturday, July 20, 2019		0
Sunday, July 21, 2019		0
Monday, July 22, 2019		0
Tuesday, July 23, 2019		0
Wednesday, July 24, 2019		0
Thursday, July 25, 2019		8
Friday, July 26, 2019		8
Saturday, July 27, 2019		8

**Note:** The hours should be entered on the same month and day they were taken in the prior 12 months even if that is not a regular work day. (*For example*, 8 hours used on Friday, July 27, 2018 is rebanked on Saturday, July 27, 2019, even if the employee does not work on Saturdays.)

4. Begin tracking in Column B on the date FMLA time is first used and enter each subsequent date that FMLA is used.
5. Enter any comments in Column E.
  - If the staff member begins another FMLA leave during the 12-month period, note the date of the new leave in Column E.
  - For employees with multiple FMLAs, each time the staff member uses FMLA leave, note in Column E which leave is being used (*for example, Self, Spouse, etc.*)
  - On a regular basis, managers are encouraged to review with the staff member the number of hours that have been used and the number of hours that remain available. This should be documented in Column E and the date inserted in Column F.

**Notes:**

- Duke uses a rolling 12-month calendar, not the calendar year.
- Once the information is recorded in Columns B and C, the calculation of the balance in Column D will be performed automatically.
- The Tracker will not allow an employee's available hours to go below zero.

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- After the first year, hours will be automatically rebanked on the Tracker after 12 months.
- If you want to change the date when tracking begins (Cell A8), enter the desired start date in numerical form (*for example, 7/1/19, not July 1, 2019*), and then drag the fill handle (lower right corner of cell) down, and the spreadsheet will update the dates.

2	<b>Employee Name</b>	<b>Start Date</b>	<b>End Date</b>	<b>FTE Status</b>	<b>FMLA used in prece 12 months</b>
3				1	
4	<p>Under the FMLA, you are entitled to take up to 12 weeks of unpaid leave in a 12 month rolling period based currently fill a ____ FTE position and are entitled to ____ hours per year.</p> <p>The table below shows a running total utilization of your FMLA hours and balance from the date your FMLA</p> <p>(See <a href="http://www.hr.duke">www.hr.duke</a> _____ for instructions on completing this spreadsheet.)</p>				
5	<b>Date</b>	<b>Hours Taken</b>	<b>Rebanked Hours</b>	<b>FMLA Hour Balance</b>	<b>Comments</b>
6				480	
7	Monday, July 1, 2019	480		0	
8	Tuesday, July 2, 2019	480		0	
9	Wednesday, July 3, 2019		480	480	
10	Thursday, July 4, 2019		480	480	
11	Friday, July 5, 2019			480	
12	Saturday, July 6, 2019			480	
13	Sunday, July 7, 2019			480	
14	Monday, July 8, 2019			480	
15	Tuesday, July 9, 2019			480	