

Los Angeles Unified School District

**AWMS Personnel Management Group**  
**Create/Edit a Labor Record in Maximo**

## LAUSD Maintenance and Operations Create/Edit a Labor Record in Maximo

### DEFINITION

A Maximo Labor record consists of detailed Los Angeles Unified School District (LAUSD) employee data held in a general information screen and three additional tabs for personal information, training, and counseling/FMLA. Each employee record has a photo displayed on the Personal Info tab.

### PURPOSE

Labor records in Maximo are a compilation of employee data divided into separate screens by category, designed to provide a secure platform for viewing, editing, and reporting on LAUSD employees. Due to the sensitive nature of employee data, security is preserved using a hierarchy of permissions. Each site has a limited number of personnel permitted to view and edit Labor records in Maximo. The Area Facilities Services Director (AFSD) or Site Administrator must approve and forward each request for Labor permissions in an e-mail to the Maximo Administrator.

### OVERVIEW

The following functions may be performed in the Labor application:

- Labor tab
  - Create a new Labor record.
  - Update an existing Labor record.
- Personal Info tab
  - Enter personal information such as home address/phone.
  - Enter Drivers License and Personal Vehicle information.
  - Enter Emergency and Physician information.
- Training tab
  - Enter Training completed by an employee.
- Counseling/FMLA tab
  - Enter Counseling or Discipline information.
  - Enter FMLA information.
- Attached Documents tab
  - Attach an employee photo in Attached Documents.
  - Attach employee forms and documents.
- Reports
  - Discipline Tracking Report
  - Emergency Call Out Report
  - Employee Discipline Report
  - Employee Personal Information Report
  - Expired Drivers License Report



Note: Employees with Labor permissions will only be able to view/edit records for employees located in their own Area/Region. To view/edit a record in the system which does not appear in your Area/Region, contact the employee's prior Site Administrator to request a transfer of the record. The Site Administrator of the "old" location is responsible for completing the following to transfer the employee record:

- Complete the assignment by entering the End Date and Reason in the "exiting" assignment row(s).
- Change the "exiting" Area/Region to the "new" Area/Region.
- Save the record.
- The employee record will now appear in the current Area/Region.

## 1. CREATE A NEW LABOR RECORD

**Permissions** Contact your Site Administrator for permissions to enter, edit, or view Labor records.

## 2. THE PRINCIPAL CLERK, OR DESIGNEE, LOGS INTO MAXIMO AND NAVIGATES TO THE LABOR TAB

**AWMS Maximo** Log in to AWMS Maximo:

- Hover the mouse over the Resources module to display the dropdown menu.
- Click on Labor.



Note: Employee information to be entered into a new Maximo Labor record is taken from hardcopies provided by Personnel, Human Resources, or forms filled out by the employee on site. To update employee information from existing labor records in Maximo, print and distribute the Employee Personal Information Report (Labor/Select Action/Run Reports/Employee Personal Information Report), have the employee update the hardcopy, and enter updates into Maximo.

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### CREATE/EDIT A LABOR RECORD IN MAXIMO

#### Search

Search the system for the Employee number to ensure it does not already exist:




- Enter the Employee number in the "Quick Key Search" field.
- Hit <Enter> or the "Binoculars".
  - a. **No populated records are returned: click on the "New Labor" icon in the toolbar to create a new Labor record.**
  - b. Partial record appears: this indicates the employee record is located in another Area/Region. Contact the Site Administrator for that Area/Region to request the record be released.
  - c. Fully populated record appears: edit the fields as needed. Not all fields on an existing record are modifiable. Certain fields become "read only" after they have been saved for security reasons.

The screenshot shows the Maximo Labor record search interface. The 'Current Query' field is set to '741394'. The 'Search' tab is active, and the 'New Record Icon' (binoculars) is highlighted with a callout box. The interface includes various search criteria fields such as Emp No., Class Code, Section Code, Vendor, Area/Region, 1st Level Supervisor, Address, City, State, Zip, Home Phone, Work Phone, License Plate No., Craft, Labor Group, Status Type, Work Group, Area Based?, and Class Hire Date. There are 'Find' and 'Clear' buttons at the bottom right.

#### Labor Tab

A blank Labor record appears with the Labor tab displayed. The highlighted fields are required to be populated before the record may be Saved. The Area/Region field auto populates based on the Area/Region of the user logged in.




Note: Known values may be typed directly into the fields. If the values are unknown, the field buttons may be utilized to make selections, such as Select Value , Detail Menu , or Calendar . A sample for using each of the field buttons is provided the first time they appear in these instructions only.

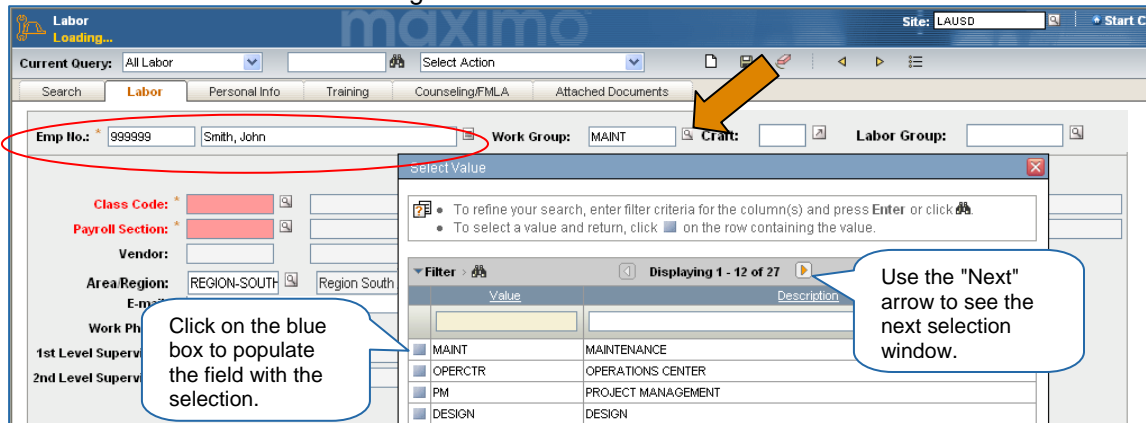
The screenshot shows the Maximo Labor record details interface. The 'Emp No.' field is highlighted in red. The 'Details' section includes fields for Assign. Basis, Calendar, Step, Shift, Default WO Priority, Status Type, District Pager, Dist Cell Phone, Fax Number, Emergency Call Out?, Area Based?, Tool Allowance, Lead, and Short Diff. The 'Area/Region' field is populated with 'REGION-SOUTH' and 'Region South'. There are 'Find' and 'Clear' buttons at the bottom right.

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### CREATE/EDIT A LABOR RECORD IN MAXIMO

#### Name/Work Group *Fields are addressed in tab order.*

- Enter the unique employee number identifying the employee in the "Emp No" field.
- Enter the employee Name using the following naming convention: last name, (no space) comma, space, full first name (e.g. Smith, John).
- When the employee number is Saved, this field becomes "Read Only".
- Type the Work Group or click on Select Value  to choose from the selection. Click on the blue box next to your selection to populate the field. The Work Group is the "Branch" of LAUSD the employee is working for.




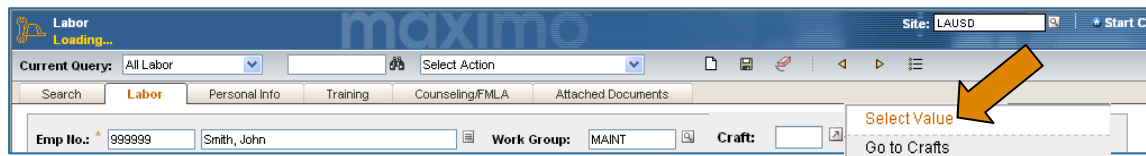
Click on the blue box to populate the field with the selection.

Use the "Next" arrow to see the next selection window.

#### Craft

Two-letter alpha code for the trade or profession of the employee.

- Generally, the Craft Code will auto populate after the Class Code is entered.
- If the Craft Code does not populate, enter the two-letter Craft Code if it is known, or click on the Detail Menu  button to search for the Craft Code. Choose "Select Value".



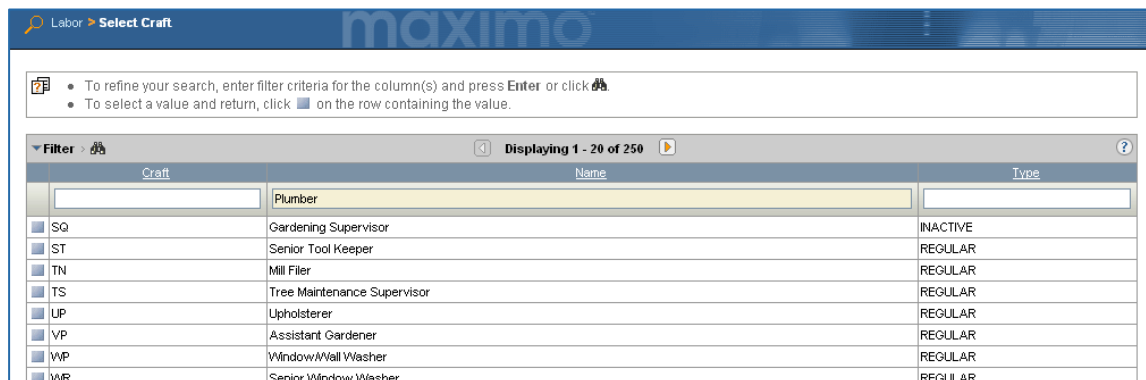
Select Value

Go to Crafts

#### Search

Type the search criteria in the "Name" field of the selection list.

- Hit <Enter>.



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Craft	Name	Type
	Plumber	
<input type="checkbox"/>	SQ Gardening Supervisor	INACTIVE
<input type="checkbox"/>	ST Senior Tool Keeper	REGULAR
<input type="checkbox"/>	TN Mill Filer	REGULAR
<input type="checkbox"/>	TS Tree Maintenance Supervisor	REGULAR
<input type="checkbox"/>	UP Upholsterer	REGULAR
<input type="checkbox"/>	YP Assistant Gardener	REGULAR
<input type="checkbox"/>	WP Window/Wall Washer	REGULAR
<input type="checkbox"/>	WR Senior Window Washer	REGULAR

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#### Craft

Click on the blue box  next to your selection to populate the Craft field.

	Name	Type
<input type="checkbox"/>	Plumber	
<input type="checkbox"/>	Senior Plumber	REGULAR
<input type="checkbox"/>	Plumber	REGULAR
<input type="checkbox"/>	Apprentice Plumber	REGULAR

#### Labor Group

Enter the Labor Group or "Lead Craft" for Area Based personnel only. The Labor Group combines the Region/Area and Craft of the employee into one code. This field should be left blank for Site (School) Based employees.

Emp No.: \* 999999 Smith, John Work Group: MAINT Craft: GR Labor Group: 7-GA

## Details Section

**Details**

Class Code: \* 3311 SENIOR PLUMBER Assign. Basis: A Calendar: M-F Monday thru Friday 5 Days 4  
Payroll Section: \* 1431 M&O DIST 7 FORCE ACCT Step: 5 Shift: A7\_330 Day Shift 7:00-3:30  
Vendor: Default WO Priority: 3  
Area Region: REGION-SOUTH Region South Outside?  Status Type: REGULAR  
E-mail: todd.short@lausd.net Dist Cell Phone: NONE District Pager#: NONE  
Work Phone: 323-789-5027 Fax Number: 323-971-1660  
1st Level Supervisor: 680129 Laudenberg, Gerald T. Emergency Call Out?  Tool Allowance:   
2nd Level Supervisor: 239059 Smithal, Robert Area Based:  Lead:   
Short Diff:

#### Class Code

Positions or groups of positions are referred to as job "classes" and have class titles and four-digit codes by which they are identified. Enter the four-digit Class Code in this field and tab to auto populate the class title.

#### Assign. Basis

Single alpha code (A-X) indicating the employee's yearly work assignment basis. For example; A=12 months per year, or B=10 months per year.

#### Calendar

Specifies the consecutive days making up a work period. Typically, this will be a forty-hour work week. For example, Monday through Friday (5 days, 40 hours).

#### Payroll Section

The Section Code the employee is paid from when performing force account work. This should not be the School Section Code if the employee is Site (School) Based, but rather the M&O force account Section Code (example: if a site based employee is assigned to San Pedro HS, section code 8850 and the force account M&O S2 operations section code is 1424, you will enter 1424.)

#### Step

The numeric value (1 - 5) for the "Step", or level of payscale, for the employee's position.

<b>Shift:</b>	Specifies the consecutive working hours in a day making up a "Shift".
<b>Default WO Priority</b>	Default Priority level used for scheduling a Work Order. The Default Priority entered in this field auto populates any Work Order in which this worker is the value in the "Reported By" field. Leave this field blank for Site Based employees. Enter "1" for CPMs. For all other Area Based employees, enter "3".
<b>Emerg. Call Out</b>	This checkbox defaults to checked and indicates an employee who may be called to work in the event of an emergency. The Emergency Call Out Report lists these employees for immediate access to a large number of records. Verify that it is checked for an Area Based employee. Uncheck the box for Site (School) Based employees.
<b>Area/Region</b>	High level in the LAUSD Location Hierarchy the employee is assigned to work under. The Area/Region auto populates in a new record from the user's log in. Verify that the Area/Region is correct for the employee.
<b>Outside?</b>	A check in this box indicates a contractor outside of LAUSD. This checkbox defaults to unchecked, meaning that the labor record is for a LAUSD employee. This checkbox should only be checked when creating a Labor record for an outside contractor.
<b>Status Type</b>	Work Status of the employee. For example "Regular" or "Inactive".
<b>E-mail</b>	The employee's work e-mail address.
<b>Dist. Cell Phone</b>	The employee's work cell phone number including the area code.
<b>District Pager</b>	The employee's work pager number including the area code issued by LAUSD.
<b>Work Phone</b>	The work phone number that can be used to contact the worker including the area code, preferably the direct line.
<b>Fax Number</b>	The work fax number including the area code for the employee.
<b>1st Level Superv.</b>	The employee number of the employee's immediate Supervisor.
<b>2nd Level Superv.</b>	The employee number for the Supervisor of the 1st Level Supervisor.
<b>Area Based</b>	Indicates this employee is assigned to the M&O Area. This checkbox defaults to checked. Verify that it is checked for an Area Based employee and unchecked if the employee is Site Based.
<b>Tool Allowance</b>	A numeric code used to indicate an employee's daily "flat rate" of mileage reimbursement as specified in their Bargaining Unit Agreement. This is in recognition of the fact that many employees regularly use their own vehicle to haul District materials, tools, supplies and equipment and is in addition to their per mile reimbursement.
<b>Lead</b>	A numeric code used when an employee is performing leadership on a job as specified in his/her Bargaining Unit Agreement.
<b>Short Diff:</b>	A numeric code used when an employee is working above his/her class to fill in for an absent employee at a higher pay rate. For example: 2 = Journeyman filling in as Senior.

# Employment History Section

**Tip**

Shortcuts for entering dates in Maximo:

1. If the date is in the current month, simply enter the number of the day and hit the Tab key. The system will auto populate the date. For example, if the current month is January and you wish to enter the date, January 03, 2010; simply enter 3 in the date field and hit the tab key. The field will be populated with 01/03/010
2. Instead of using / between the numbers, a period may be used. For example; 1.3.10 would populate as 01/03/10.
3. Use the Calendar button next to the field as illustrated below.

**Employment History**

**Birth Date:**

**Location Hire Date:**

**LAUSD Hire Date:**

**Class Hire Date:**

**Birth Date**

Enter the employee's Birth Date using one of the shortcuts listed above, or use the Calendar button to select the Date.

**Select Date**

May 2010

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

June 2010

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

**LAUSD Hire Date**  
**Location Hire Date**  
**Class Hire Date**

Enter the Date the employee was first hired by LAUSD.  
 Enter the Date the employee was hired at the current location.  
 Enter the Date the employee was first hired at the current "class" or position.

## Security Section

**Security**

**Can Edit Labor?**

**Can View/Edit Counseling?**

**Can Edit Labor**

Permissions to Edit Labor are restricted to only certain Designees. The Maximo Administrator places a check in this box to indicate the employee has permission to Edit Labor records. This box can only be seen by the Maximo Administrator.

**Can View/Edit**

Permissions to View/Edit Counseling are restricted to only certain Designees. A check in this box indicates the employee has permission to View or Edit Counseling records. This box can only be seen by the Maximo Administrator.

## Assignments Section

**Assignments**



Click on the New Row button to create a New Assignment. Create an assignment for each employee record. New Row for each part of a split assignment.

**Class Code**

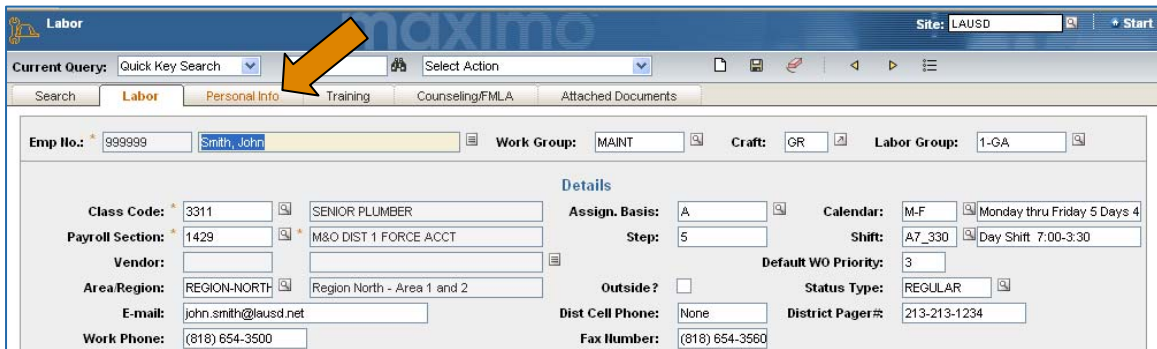
Positions or groups of positions are referred to as job “classes” and have class titles and four-digit codes by which they are identified. Enter the four-digit Class Code in this field and tab to auto populate the class title.

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<b>Position CN:</b>	A unique eight-digit number ID issued by Budget Services identifying each position at a location.
<b>Work Location</b>	A Maximo number used to identify a LAUSD location the employee is working at for this assignment. An employee may have several assignments, each at a different location. For an employee assignment at a School, enter the site level Maximo Location ID the employee is working at; not the M&O Location Code.
<b>Position Status</b>	A single digit code indicating the status of the employee's position at the time of this assignment. For example; "0" = Inactive and "1" = Regular. Tab and the description of the Status appears.
<b>Start Date</b>	The Date the employee starts this work assignment.
<b>End Date</b>	The End Date will be left blank until the employee ends this work assignment. This field becomes "Read Only" when it is populated and Saved.
<b>Reason</b>	This field will be left blank until the employee ends this assignment. At the end of the assignment, enter a brief description from the value list for the reason it is ending.
<b>Comments</b>	Use the Comments field to record the hours and time for employees with positions where they are working at more than one location (Split Positions). Use the Long Description  button for additional details.
<b>Modified Fields</b>	Modified By and Modified Date fields auto populate from the user log in when the record is modified.
<b>Save the Record</b>	Click on the Save  icon in the Maximo toolbar to Save the record.

**Personal Info Tab** Click on the Personal Info tab to continue.



The screenshot shows the Maximo Labor record form for John Smith. The 'Personal Info' tab is selected, indicated by an orange arrow. The form displays the following information:

Emp No.:	999999	Smith, John	Work Group:	MAINT	Craft:	GR	Labor Group:	1-GA
<b>Details</b>								
Class Code:	3311	SENIOR PLUMBER	Assign. Basis:	A	Calendar:	M-F	Monday thru Friday 5 Days 4	
Payroll Section:	1429	M&O DIST 1 FORCE ACCT	Step:	5	Shift:	A7_330	Day Shift 7:00-3:30	
Vendor:			Default WO Priority:	3				
Area/Region:	REGION-NORTH	Region North - Area 1 and 2	Outside?:	<input type="checkbox"/>	Status Type:	REGULAR		
E-mail:	john.smith@lausd.net		Dist Cell Phone:	None	District Pager#:	213-213-1234		
Work Phone:	(818) 654-3500		Fax Number:	(818) 654-3560				

# Personal Info

## Employee Photo

An employee photo will be attached to the Labor record and appear in the Personal Info tab. Instructions titled, "Attach an Employee Photo to a Labor Record", are provided as a separate Maximo Guide. Employee photos are provided by the local Area Tool Keeper or Designee responsible for creating Photo ID Badges for the employee's work location.

The screenshot shows the 'Personal Info' tab in the Maximo system. The 'Emp No.' field contains '999999' and the name 'Smith, John'. A callout box points to a placeholder area with the text: "The Employee photo will display here when it is attached to the Labor record." Other sections include 'Drivers License Info', 'Person to Notify in Case of Emergency', 'Physician', and 'Personal Vehicle'.

## Home Phone

Employee's home phone number including the area code.

## Street

Employee's home street address or address of record.

## Personal Cell Phone

Employee's personal cell phone number including the area code (Optional).

## City

City the employee lives in.

## State

This field defaults to California (CA). State the employee lives in.

## Zip

The U.S. Postal Zip Code of the employee's home address.

## Driver's License Info

Drivers License Info		
Drivers License Required?	<input checked="" type="checkbox"/>	Expiration Date: 6/5/02
Drivers License No.:	A0799999	

**Driver's License Req.** This checkbox defaults to checked. Verify that the employee's position is one that requires a driver's license. Uncheck the box if a driver's license is not required.

**Driver's License No.** Employee's driver's license number.

**Expiration Date** The Date the Employee's driver's license expires.

## Person to Notify in Case of Emergency

Person to Notify in Case of Emergency					
Name 1:	Nancy Drew	Relation:	Mother	Home Phone:	(818) 123-4567
				Business Phone:	(213) 241-4600
				Cell Phone:	(818) 777-8888
Name 2:	Sherlock Holmes	Relation:	Father	Home Phone:	(818) 123-4567
				Business Phone:	(213) 310-5600
				Cell Phone:	(818) 888-9999

**Name** Full name of the first person to notify in case of an Emergency.

**Relation** Relationship between employee and the person listed here.

**Home Phone** Home phone number of the person listed here.

**Business Phone** Work phone number of the person listed here.

**Cell Phone** Cell phone number of the person listed here.

**Name** Full name of the second person to notify in case of Emergency.

**Relation** Relationship between employee and the person listed here.

**Home Phone** Home phone number of the person listed here.

**Business Phone** Work phone number of the person listed here.

**Cell Phone** Cell phone number of the person listed here.

## Physician

Physician			
Health Plan:	Blue Cross	Update Date:	2/17/10
Name:	Dr. Heratio Cane	Phone:	(818) 999-1000
Address:	123 Miami Lane	City:	Hometown
		Zip:	91400
		Pre-designation of Physician?	<input checked="" type="checkbox"/>

**Health Plan** Full name of the employee's primary Health Plan.

**Update Date** If the checkbox titled, "Pre-Designation of Physician" is checked, enter a date one year from the date the employee signed the Pre-designation of Physician form.

**Pre-Designation** An employee may file a form stating the name of the Physician they wish to receive treatment from in case of an Emergency. Check this box to indicate the form has been submitted. A new form must be submitted each time any of the information on the form changes.

**Name** Full name of the employee's primary care Physician.

**Business Phone** Work phone number of the employee's primary care Physician.

**Address** Street address of the employee's primary care Physician.

**City** City the employee's primary care Physician is located in.

**Zip** The U.S. Postal Zip Code of the employee's primary care Physician.

# Personal Vehicle

License Plate No.	Make	Model	Color
A578K98	Chevrolet	Astro Mini Van	Green

License Plate No.: A578K98    Make: Chevrolet    Model: Astro Mini Van    Color: Green

**New Row**  
**License Plate No.**

Click on the "New Row" button to open the Personal Vehicle details. Full License Plate number of employee's personal vehicle. Create a separate line entry for each employee personal vehicle that may be utilized by this employee.

**Make**  
**Model**  
**Color**  
**Save**

The name of the vehicle manufacturer.  
The name of the vehicle model.  
The color of the vehicle.  
Save the record.

## Sample

Filled in Personal Info tab.

**Personal Info**

Emp No.: 999999    Name: Smith, John    Home Phone: (818) 123-4567  
 Street: 123456 Dwelling Drive    Personal Cell Phone: (818) 456-789  
 City: Hometown    State: CA    Zip: 91400

**Drivers License Info**

Drivers License Required?     Drivers License No.: A0799999    Expiration Date: 6/5/02

**Person to Notify in Case of Emergency**

Name 1: Nancy Drew    Relation: Mother    Home Phone: (818) 123-4567    Business Phone: (213) 241-4600    Cell Phone: (818) 777-8888  
 Name 2: Sherlock Holmes    Relation: Father    Home Phone: (818) 123-4567    Business Phone: (213) 310-5600    Cell Phone: (818) 888-9999

**Physician**

Health Plan: Blue Cross    Update Date: 2/17/10    Pre-designation of Physician?   
 Name: Dr. Heratio Cane    Phone: (818) 999-1000  
 Address: 123 Miami Lane    City: Hometown    Zip: 91400

**Personal Vehicle**

License Plate No.	Make	Model	Color
A578K98	Chevrolet	Astro Mini Van	Green

# Counseling/FMLA

The screenshot shows the Maximo Labor record interface for employee 999999 (Smith, John). The search criteria include Work Group: MAINT, Craft: GR, and Labor Group: 1-GA. Two tables are displayed, both showing "No Counseling found" and "No FMLA found".

**Counseling for 999999**

Action Date	Action Type	Action By	Action Taken	Active
No Counseling found				

**FMLA for 999999**

Status	Relationship	Name	Approval/Denial Ltr. Date
No FMLA found			

## Counseling

The screenshot shows the detailed view of a counseling action for employee 999999 (Smith, John). The action type is NOUS, reported on 1/20/10, and action taken on 3/2/10 by Cheski, Thomas Edward. The Skelly response is "Forward as is." dated 4/6/10.

**Counseling**

Reported Date	Date of Pre-Disc	Action Date	Action Type	Action By	Action Taken	Skelly Response	Active
1/20/10	2/24/10	3/2/10	NOUS	Cheski, Thomas Edward	Dismissal.	Forward as is.	<input type="checkbox"/>

**Reported Date:** 1/20/10 **NOUS Issue Date:** 2/4/10 **Date of Pre-Disc:** 2/24/10 **Action By:** 310304 Cheski, Thomas Edward

**Description:** Falsification of time. **Action Type:** NOUS **Active:**

**Action Taken:** Dismissal.

**Skelly Date:** 3/31/10 **Skelly Respondent:** 520517 Titzel, Howard Allen **Skelly Resp Date:** 4/6/10

**Skelly Response:** Forward as is.

**Comments:** NOUS to HR 2-25-10, Dismissed effective 5-5-10 **HR Rep:** 557994 Fisher, HB

**Modified By:** JRILEY **Modified Date:** 3/4/10 8:19 AM



Note: The term "Skelly " means an Administrative Review.

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**Reported Date** The date the employee's Supervisor first became aware of the specific acts and omissions upon which the counseling and/or discipline is being considered or documented.

**NOPDA Issue Date** The date the "Notice of Possible Disciplinary Action" was issued to the employee.

**Date of Pre-Disc** The date the Pre-Disciplinary meeting was held. If rescheduled, update to the new date and add a note to "Comments" field to track the change.

**Action By** The employee number of the supervisory employee initiating the counseling or discipline.

**Description** A brief description of the offense.

**Action Date** Date the Action is issued or mailed (U.S. Mail) to the employee.

**Action Type** Click on the Action Type field button to display the selection and choose the appropriate action by clicking on the blue box to the left. If no Action is taken, uncheck the "Active" checkbox, and type "No further Action" in the "Action Taken" field.

Value	Description
<input type="checkbox"/>	
<input type="checkbox"/> VERBAL	Verbal Conference
<input type="checkbox"/> WRITTEN	Written for attendance only
<input type="checkbox"/> CONF MEMO	Conference Memo
<input type="checkbox"/> LOR	Letter of Reprimand
<input type="checkbox"/> NOUS	Notice of Unsatisfactory Serv.
<input type="checkbox"/> EVAL	Below Standards Perf. Eval.

**Active**  This box defaults to checked when a "New Row" is created. If the action is something other than a "Notice of Unsatisfactory Service" (NOUS), list the action and uncheck this box. If the action is a NOUS, uncheck this box after the "Skelly Response" has been written and sent.

**Action Taken** Comments field to describe the action taken or any related notes. For example, as a result of the NOUS (Action Type), the employee was dismissed or received a 5-day suspension. If no action was taken, uncheck the "Active" checkbox and enter "No further Action" in this field. The Long Description field button is available to open a blank screen for additional notes.

**Skelly Date** Date of "Skelly" or administrative review. If rescheduled, update to the new date and add a note to "Comments" field to track the change.

**Skelly Respondent** The employee number of the administrator (usually the AFSD or LDFD), presiding over the Skelly Meeting.

**Skelly Resp Date** The date the response, or action determined at the Skelly Meeting was issued (or mailed) to the employee.

**Skelly Response** The final action determined by the AFSD, and included in the Skelly Response document.

**Comments** Notes field for any modifications made to a Disciplinary Action and reasons for the change. Examples of notes that may be tracked are:

- Rescheduled Pre-Disciplinary Meeting or Skelly Meeting dates and the reason why.
- Date the Notice of Unsatisfactory Service was sent to Human Resources.


**HR Rep** Employee number of the LAUSD Human Resources Representative involved in the review, attendance, or writing of any portion of this action.

**Modified By** Name of the user logged in auto populates this field when the counseling record is modified.

**Modified Date** The date the counseling record is modified.

# FMLA

The Family and Medical Leave Act (FMLA) provides eligible District employees with twelve weeks of protected absence or leave per Fiscal Year when the employee or a covered family member experiences a “serious health condition,” or when an employee requests time to bond with a child after the child’s birth, adoption or foster care.

 Note: The original FMLA forms are submitted to Human Resources after being reviewed by the AFSD/Designee. The employee designated to enter FMLA information should be entering updates when the claim is approved or denied. Use the Comments field to note any pertinent information.

- Status** Preliminary approval (PRELIM) can be provided by the AFSD/Designee. APPROVED or DENIED statuses are determined by Human Resources Representatives only. Ensure this field is updated upon the receipt of an Approval or Denial letter.
- Forms to HR Date** The Date the request for FMLA is submitted to Human Resources.
- Appr/Denial Ltr. Date** The Date the request for FMLA has been approved or denied by the Human Resources Representative.
- Relationship** If the FMLA has been requested to care for a family member, the relationship with that family member should be entered in this field. If the FMLA request is for the employee him/herself, leave this field blank.
- Name** If the FMLA has been requested to care for a family member, the name of that family member should be entered in this field. If the FMLA request is for the employee him/herself, enter the employee's name in this field.
- Consecutive Dates** If the FMLA has been requested for a consecutive number of days, enter the "From" and "To" dates here.
- Intermittent Dates** If the FMLA has been requested for intermittent periods, allowing the employee to return to work in between the periods of leave, enter the "From" and "To" dates here.

## Revision 9, 03/10/10 AWMS – Personnel Management Group

CREATE/EDIT A LABOR RECORD IN MAXIMO

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<b>Comments</b>	Notes or comments related to the FMLA request may be entered here. DO NOT ENTER A DIAGNOSES.
<b>Modified By</b>	User log in auto populates the user's name in this field when the record is modified.
<b>Modified Date</b>	Date the record is modified auto populates this field.

**For more FMLA information and forms, contact the Human Resources Representative for your Area/Region or consult your Area Facilities Services Director/Designee.**

## Reports

The following reports support the Labor application:


1. Emergency Call Out Report
2. Employee Discipline Detail Report
3. Employee Discipline List Report
4. Employee Personal Information Report
5. Expired Drivers License Report
6. FMLA added to the bottom of the Incident Report
7. FMLA added to the bottom of the Personal Attendance Report
8. Labor Permissions Report

Which reports an employee may use is determined by their user group permissions. The following pages show a sample of each report listed above with:

- User permissions needed to run the report.
- Purpose of the report.
- Maximo path to run the report.
- Report Parameters.



1. Emergency Call Out Report Sample (Personal Information is blocked on Samples)

		Los Angeles Unified School District Facilities Service Division - Existing Facilities				Maintenance and Operations			
<b>Emergency Call Out Report</b>									
For Section Code(s): 1425 Order by Area/Region, Section Code, Class Title, City, Employee Name									
Class Title	Name	City	Pager #	District Cell	Home Phone	Emergency Contact	Emergency Phone	Emergency Business Phone	Emergency Cell Phone
<b>Area/Region: REGION-SOUTH</b>									
<b>Section Code: 1425</b>									
Labor class title	Labor record name	Northridge	213-555-1212	213-555-1212	213-555-1212	Emergency contact name	213-555-1212	213-555-1212	213-555-1212
Labor class title	Labor record name	Irvine	213-555-1212	213-555-1212	213-555-1212	Emergency contact name	213-555-1212	213-555-1212	213-555-1212
Labor class title	Labor record name	Redondo Beach	213-555-1212	213-555-1212	213-555-1212	Emergency contact name	213-555-1212	213-555-1212	213-555-1212
Labor class title	Labor record name	Ontario	213-555-1212	213-555-1212	213-555-1212	Emergency contact name	213-555-1212	213-555-1212	213-555-1212
Labor class title	Labor record name	Harbor City	213-555-1212	213-555-1212	213-555-1212	Emergency contact name	213-555-1212	213-555-1212	213-555-1212
Labor class title	Labor record name	Lancaster	213-555-1212	213-555-1212	213-555-1212	Emergency contact name	213-555-1212	213-555-1212	213-555-1212
Labor class title	Labor record name	Carson	213-555-1212	213-555-1212	213-555-1212	Emergency contact name	213-555-1212	213-555-1212	213-555-1212
Labor class title	Labor record name	Hermosa Beach	213-555-1212	213-555-1212	213-555-1212	Emergency contact name	213-555-1212	213-555-1212	213-555-1212
Labor class title	Labor record name	Long Beach	213-555-1212	213-555-1212	213-555-1212	Emergency contact name	213-555-1212	213-555-1212	213-555-1212
Labor class title	Labor record name	Long Beach	213-555-1212	213-555-1212	213-555-1212	Emergency contact name	213-555-1212	213-555-1212	213-555-1212
Labor class title	Labor record name	Los Angeles	213-555-1212	213-555-1212	213-555-1212	Emergency contact name	213-555-1212	213-555-1212	213-555-1212

**Permissions:** Labor Permissions


**Purpose:** Used to view a list of Emergency Contact Information at-a-glance.

**Path:** Resources Module  
 Labor Application  
 Select Action – Run Reports  
 Emergency Call Out Report

**Parameters** Select the Labor Area/Region  
 - AND/OR -  
 Section Code or Labor Group  
 Four Sort Options:

- Area/Region, Section Code, Class Title, City, Emp. Name
- Area/Region, Section Code, Class Title, Emp. Name
- Area/Region, Section Code, City, Emp. Name
- Class Title, Emp. Name

2. Employee Discipline Detail Report Sample

	<b>Los Angeles Unified School District</b> <i>Facilities Service Division - Existing Facilities</i>		<i>Maintenance and Operations</i>
	<b>Employee Discipline Details</b> Report parameters: Section Code(s) 1424; Active Counseling Records Only; All counseling events; sorted by reported date, then employee name		
Reported Date: 9/25/2009 Classification: BUILDING AND GROUNDS WORKER	Employee #: 123456 Assigned Site(s): 8575-CARSON HS HR Rep: 741176 Gordon-Cate, Connie	Name: Joe Worker Date of Pre-Disc: 10/30/09 Action By: 572608 Reising, Alan	Class Code: 4075 Active record?: Y
Description: falsification, deterioration of duty			
Action Date: 1/19/2010 Action Taken: 5 days suspension Action Type: NO US			
Shelly Date: 2/4/2010 Shelly Response:			Shelly Respondent: 536605 Barnett, Stacy Shelly Response Date:
Comments: 1st pre-disc was 10-1-09. Added chgs so 2nd pre-disc 10-30. 11-18-09 NO US to Connie 1-11-10 Connie and Stacy discussed and decided on 5 day recommendation. 1-12-10 NO US ready for issuance to Stacy			

**Permissions:** Labor Permissions and View/Edit Counseling within Area/Region.

**Purpose:** Used to view Disciplinary Action for an Employee.

**Path:** Resources Module  
 Labor Application  
 Select Action – Run Reports  
 Employee Discipline Detail Report

**Parameters**

**Counseling Event Status:**

- Both Active and Inactive
- Active Only
- Inactive Only

**Sort Results by:**

- Reported Date, then Employee Name
- Employee Name, then Reported Date

**Include Counseling Events between:**

- From Date
- To Date

**Labor Code (from your Area/Region only)**  
**Section Code**  
**Labor Group**

3. Employee Discipline List Report Sample

Reported Date	Name/Assigned Location	Classification	Empl. #	Date of Pre-Disc	Action By	Description	Action Type	Action Taken	Shelley		Comments
									Date	Response	
8/25/2009 INACTIVE	Emp. Name MORAPERS	MAINTENANCE WORKER	123456		D. ESPARZA		VERBAL	ATTENDANCE			
12/18/2009 INACTIVE	Emp. Name MORAPERS	SENIOR FLOOR COVERING INSTALLER	123456	1/13/2010	659061 Sankelz, Edward	betakey to school site	NO US	5 days suspension	2/6/2010	agreement 1 day suspension	
12/23/2009 ACTIVE	Emp. Name MORAPERS	PLUMBER	123456	2/3/2010	659061 Sankelz, Edward	lack of materials	NO US	15 days suspension	3/3/2010		no show to call for 1-11 pre-disc. He did call in to stop as sick. PD rescheduled to 2-3-10
12/24/2009 INACTIVE	Emp. Name MORAPERS	PAINTER	123456	1/29/2010	659061 Sankelz, Edward	attendance	NO US	5 days suspension	2/19/2010	agreement 1 day suspension	pre-disc rescheduled to 1-29-10, 2-1-10 NO US to come
1/19/2010 ACTIVE	Emp. Name MORAPERS	WINDOW/WALL WASHER	123456	1/29/2010	659061 Sankelz, Edward	breaking time	NO US	5 days suspension			
1/27/2010 ACTIVE	Emp. Name MORAPERS	SENIOR PLUMBER	123456	2/10/2010	536905 Barnett, Stacy	breaking words to plumber					
2/10/2010 INACTIVE	Emp. Name MORAPERS	SHEET METAL WORKER	123456		117680 Dinkson, Danel		VERBAL	quantity of work			

**Permissions:** Labor Permissions and View/Edit Counseling within Area/Region.

**Purpose:** Used to view a summary of Disciplinary Action for an Employee, Area, or Area/Region.

**Path:** Resources Module  
Labor Application  
Select Action – Run Reports  
Employee Discipline List

**Parameters** Counseling Event Status:

- Both Active and Inactive
- Active Only
- Inactive Only

**Sort Results by:**

- Reported Date, then Employee Name
- Employee Name, then Reported Date

**Include Counseling Events between:**

- From Date
- To Date

**Labor Code (from your Area/Region only)**  
**Section Code**  
**Labor Group**

4. Employee Personal Information Report Sample

Los Angeles Unified School District		Facilities Service Division - Existing Facilities		Maintenance and Operations	
<b>EMPLOYEE PERSONAL INFORMATION FORM</b>					
<b>Labor Group:</b>					
Payroll Name _____					
First Initial	Middle Initial	Last Name	Craft	Assigned Craft	Area
Classification _____ Code _____ Reg _____ Temp _____ Relief _____ LTH _____					
Employee No. _____					
Date started this location _____ Date hired in this class _____					
Date first hired by LAUSD Reg. position _____ Temp. position _____					
Full Name _____					
Last		First		Middle	
Address _____					
Street		City		Zip	
Home Phone _____		Personal Cell Phone _____		District Pager No. _____	
Drivers License No. _____		Expiration Date _____		Birth Date _____	
Vehicle Allowance _____					
	Vehicle License No.	Vehicle Make	Vehicle Model	Vehicle Color	
Vehicle 1					
Vehicle 2					
Vehicle 3					
Person to notify in case of emergency:					
Name _____	Relation _____	Home Phone _____	Business Phone _____	Cell _____	
Name _____	Relation _____	Home Phone _____	Business Phone _____	Cell _____	
Family Physician					
Name _____		Phone _____			
Address _____					
Street		City		Zip	
Health Plan _____					
Signature _____			Effective Date _____		
Page 1 of 1			Wednesday, February 10, 2010		

**Permissions:** Labor Permissions.


**Purpose:** This report may be used to update employee information as needed.

**Path:** Resources Module  
 Labor Application  
 Select Action – Run Reports  
 Emp Personal Info Report

**Parameters** Include Inactive Employees? Yes or No.  
 Print Blank Form Only: Yes  
 - OR -  
 No - Enter one of the following:

- Labor Code
- Labor Group
- Section Code

5. Expired Drivers License Report Sample

Los Angeles Unified School District		Facilities Service Division - Existing Facilities		Maintenance and Operations	
 <b>Expired Driver License List</b> For Area/Region(s): REGION-SOUTH					
Department: REGION-SOUTH					
Assigned Craft	Name	Employee Number	Driver's License No.	Expiration Date	
<b>LICENSE ALREADY EXPIRED</b>					
Building Engineer	<input type="text" value="Employee Name"/>	123456	A6108644	8/27/2007	
Building Engineer	<input type="text" value="Employee Name"/>	123456	A7067599	5/17/2003	
Building Engineer	<input type="text" value="Employee Name"/>	123456	A2258302	9/27/2007	
Building & Grounds Worker	<input type="text" value="Employee Name"/>	123456	B3397488	10/22/2009	
Building & Grounds Worker	<input type="text" value="Employee Name"/>	123456	A1598464	9/28/2009	
Building & Grounds Worker	<input type="text" value="Employee Name"/>	123456	B5546575	11/15/2009	
Building & Grounds Worker	<input type="text" value="Employee Name"/>	123456	B6921617	11/7/2007	
Building & Grounds Worker	<input type="text" value="Employee Name"/>	123456	C2923384	9/26/2008	
Building & Grounds Worker	<input type="text" value="Employee Name"/>	123456	D2221614	1/23/2010	
Building & Grounds Worker	<input type="text" value="Employee Name"/>	123456	C3733532	6/28/2009	
Building & Grounds Worker	<input type="text" value="Employee Name"/>	123456	C6192891	3/4/2008	
<b>LICENSE WILL EXPIRE WITHIN 30 DAYS</b>					
Carpenter	<input type="text" value="Employee Name"/>	123456	N7378776	3/31/2010	
Maintenance Worker	<input type="text" value="Employee Name"/>	123456	N9586990	3/7/2010	

**Permissions:** Labor Permissions.

**Purpose:** This report may be used to check for an upcoming or expired Drivers License for employees who's position requires them to have a valid Drivers License.

**Path:** Resources Module  
 Labor Application  
 Select Action – Run Reports  
 Expired Drivers Licenses

**Parameters** Select one or more Area/Regions  
 Select one or more Section Codes

6. FMLA at the bottom of the Incident Report

Reason		Date	Hours	Days	Hours	Min
ILLNESS - 25511393		Work Order: 3052826				
Work Order: 3052826		Wednesday, January 20, 2010	3.93	0	3	56
		Total Hours:	3.93	0	3	56
UNPAID ABSENCE - 25591393		Work Order: 3052850				
Work Order: 3052850		Tuesday, January 19, 2010	0.15	0	0	9
late		Friday, February 12, 2010	0.22	0	0	13
		Total Hours:	0.37	0	0	22
FMLA History						
Appr/Denial Date	Consecutive Dates		Intermittent Dates		FMLA Status	Relationship
	Start	End	Start	End		Relationship Name
			9/1/2009	9/1/2010	PRELIM	SELF
			5/1/2009	5/1/2010	PRELIM	SON John Worker

**Permissions:** Any Maximo User ID

**Purpose:** Used to provide FMLA information when addressing attendance issues.

**Path:** Resources Module  
 Labor Application  
 Select Action – Run Reports  
 Attendance/Incident Report  
 Select Employee Incident Report

**Parameters**

**Counseling Event Status:**

- Both Active and Inactive
- Active
- Inactive

**Sort Results by:**

- Reported Date, then Employee Name
- Employee Name, then Reported Date

**Include Counseling Events between:**

- From Date (Not used for this report. Automatically provides data for one year prior to the "To Date".)
- To Date

**Labor Code (from your Area/Region only)**

7. FMLA at the bottom of the Personal Attendance Report Sample

Reason		Date	Hours	Days	Hours	Min	
UNPAID ABSENCE - 25591393		Work Order: 3052850					
Work Order: 3052850		Tuesday, January 19, 2010	0.15	0	0	9	
late		Friday, February 12, 2010	0.22	0	0	13	
Total Hours:			0.37	0	0	22	
FAMILY LEAVE/ILLNESS FI - 25611393		Work Order: 3052853					
Work Order: 3052853		Thursday, January 28, 2010	4.00	0	4	0	
		Thursday, January 28, 2010	4.00	0	4	0	
		Friday, January 29, 2010	4.00	0	4	0	
		Friday, January 29, 2010	4.00	0	4	0	
Total Hours:			16.00	2	0	0	
PER NEC AB-109/LC233 - 25711393		Work Order: 3055480					
Work Order: 3055480		Friday, January 22, 2010	1.22	0	1	13	
Total Hours:			1.22	0	1	13	
FMLA History							
Appri/Denial Date	Consecutive Dates Start	Consecutive Dates End	Intermittent Dates Start	Intermittent Dates End	FMLA Status	Relationship	Relationship Name
			9/1/2009	9/1/2010	PRELIM	SELF	
			5/1/2009	5/1/2010	PRELIM	SON	Larry Smith
<small>* Calculation of Days, Hours and Minutes from the total non-productive hours shown is based on the maximum number of daily regular productive and non-productive hours reported by the employee in the week in which the non-productive hours occurred. This is 8 hours unless otherwise noted.</small>							
Page 2 of 2				Thursday, March 04, 2010			

- Permissions:** Any Maximo User ID
- Purpose:** Used to provide FMLA information when addressing attendance issues.
- Path:** Resources Module  
 Labor Application  
 Select Action – Run Reports  
 Attendance/Incident  
 Select Employee Personal Attendance Report
- Parameters**
- Counseling Event Status:**
- Both Active and Inactive
  - Active
  - Inactive
- Sort Results by:**
- Reported Date, then Employee Name
  - Employee Name, then Reported Date
- Include Counseling Events between:**
- From Date
  - To Date
- Labor Code (from your Area/Region only)**

8. Labor Permissions Report Sample

Section Code		Labor Group	Labor Code	Name	Labor Edit (Y/N)	Counsel Edit (Y/N)	Business Phone	Maximo User Group	Sys Labor App Perm. Level
0479	T-ADMIN		123456	Employee Name	Y	N		PRINCLERK	Edit
0479			123456	Employee Name	Y	N	213-241-0307	PRINCLERK	Edit
0486	BUNGALOW		123456	Employee Name	Y	N		HRADMIN	Edit
0493	CS-ADMIN		123456	Employee Name	Y	N	213-745-1600	PRINCLERK	Edit
0493	CS-ADMIN		123456	Employee Name	Y	N	213-745-1600	PRINCLERK	Edit
0493	CS-ADMIN		123456	Employee Name	Y	N	213-745-1404	PRINCLERK	Edit
0493	CS-ADMIN		123456	Employee Name	Y	N	213-745-1600	HRADMIN	Edit
0493	CS-ADMIN		123456	Employee Name	Y	N	213-745-1401	PRINCLERK	Edit
0493	CS-ADMIN		123456	Employee Name	Y	N	213-745-1658	HRADMIN	Edit
0493			123456	Employee Name	Y	N		PRINCLERK	Edit

**Permissions:** Labor Permissions.

**Purpose:** Used to provide Administrators with a list of employees and their Labor Permissions.

**Path:** Resources Module  
 Labor Application  
 Select Action – Run Reports  
 Labor Permissions Report

**Parameters** View Labor Codes that can Edit Labor? Yes or No  
 View Labor Codes that can View/Edit Counseling? Yes or No