



# TIME OFF REQUESTS

## Guide

### Abstract

The purpose of this help guide is to guide you through the processes of working employees' time off requests

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## Document Revision History

Version	Date	Summary of Revisions
1.0	March 21, 2019	First release reformatted

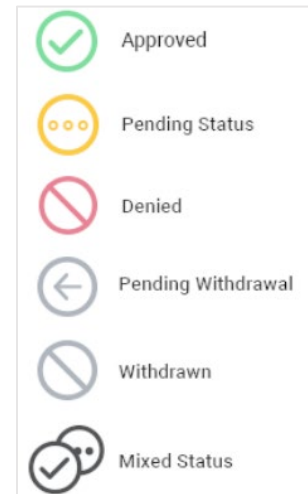
## Overview

Time Off Requests allows you to administer employee's request for time away from work.

## Time Off Request Status

The following status settings are available to an employee's time off request:

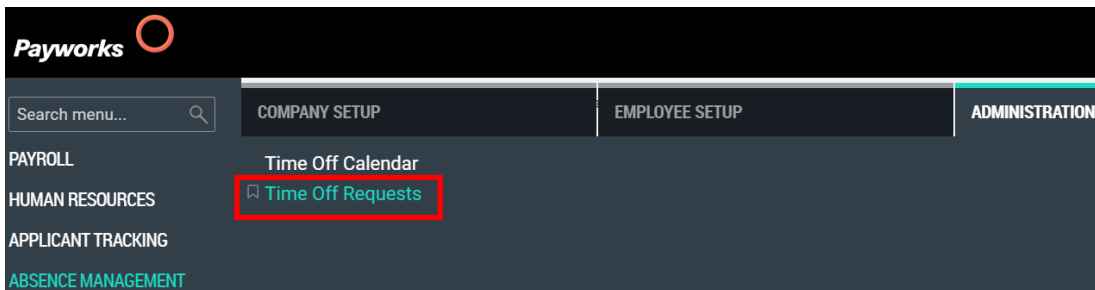
- Approved: Employee request for time off is granted
- Pending Status: Employee request is waiting for approval or denial
- Denied: Employee request was rejected
- Pending Withdrawal: Employee request to cancel time off request is waiting for approval or denial
- Withdrawn: Employee request to cancel time off request is approved
- Mixed Status: There is more than one status setting in a multi-day time off request.



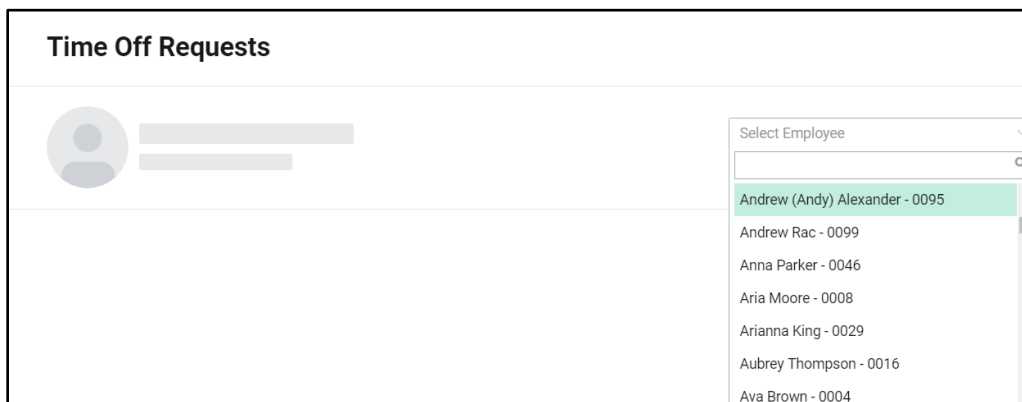
## Creating a Time Off Request on Behalf of Your Employee

To create a Time Off Request on behalf of your employee, for example, if your employee calls in sick:

1. Select **ABSENCE MANAGEMENT > ADMINISTRATION > Time Off Requests**.

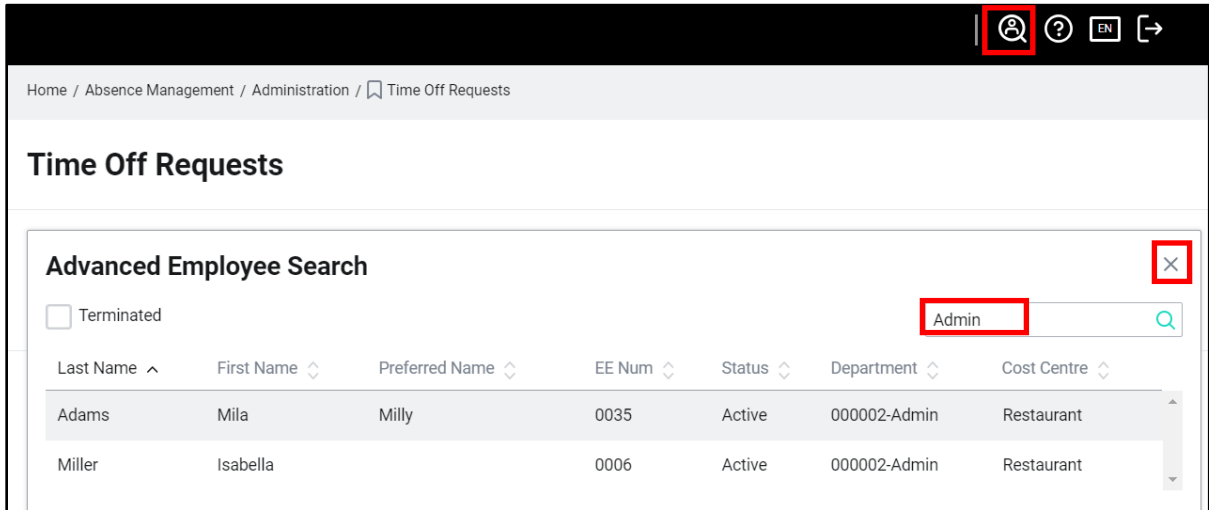


2. Select the employee by typing in the employee's first name, last name, preferred name or employee number their name or employee number from the **Select Employee** dropdown list.




Use the Advanced Search function to search for employees based on other field criteria. For example, if you are looking for an employee in the Admin department, click the **Advanced Employee Search** icon, and type **Admin** in the search field. All records that contain the character string Admin displays.

Click the **X** to the top right of the advanced search field will return you to the Select Employee dropdown list.



The screenshot shows the 'Time Off Requests' page with an 'Advanced Employee Search' filter. The search field contains the text 'Admin'. Below the search field is a table with the following data:

Last Name ^	First Name ^	Preferred Name ^	EE Num ^	Status ^	Department ^	Cost Centre ^
Adams	Mila	Milly	0035	Active	000002-Admin	Restaurant
Miller	Isabella		0006	Active	000002-Admin	Restaurant

3. On either the Upcoming tab or Past tab, click the  to add a new time off request.



The screenshot shows the 'Upcoming' and 'Past' tabs. The 'Upcoming' tab is selected. A plus icon is visible in the bottom right corner of the tab area.

4. Select the **Time Off Type** from the dropdown list, in this example, select **Sick**.
5. Modify the **From** and **To** dates to reflect today's date (or multiple days if known).
6. Add comments (optional).
7. Add Confidential Comments (comment the employee will not see - optional).
8. The Send employee time off request information checkbox controls if the employee received an email.
9. Select additional users to receive the TOR Notification (optional).

The Accrual balance reflects the amount available for use.

The Details tab displays the employee's typical workday hours / scheduled shift.

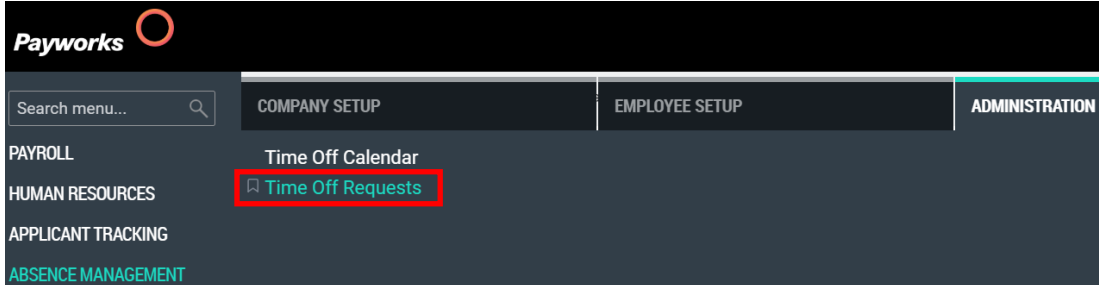
10. Click **SAVE**.  
The time off request is automatically approved. The asterisk (\*) in the top right corner indicates that a Confidential Comment exists.

✓	Vacation	Mon May 6, 2019	Fri May 24, 2019	–	5:30 pm	106.00	13 days
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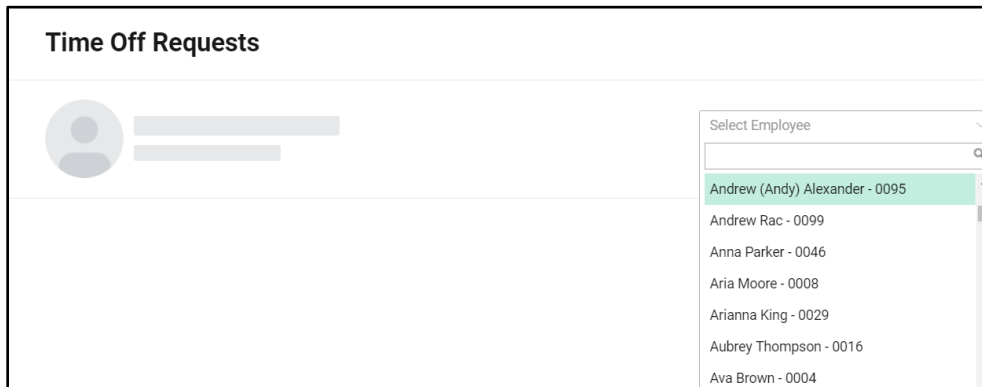
## Reviewing an Employee's Time Off Requests

To review an employee's Time Off Requests history:

1. Select **ABSENCE MANAGEMENT > ADMINISTRATION > Time Off Requests**.

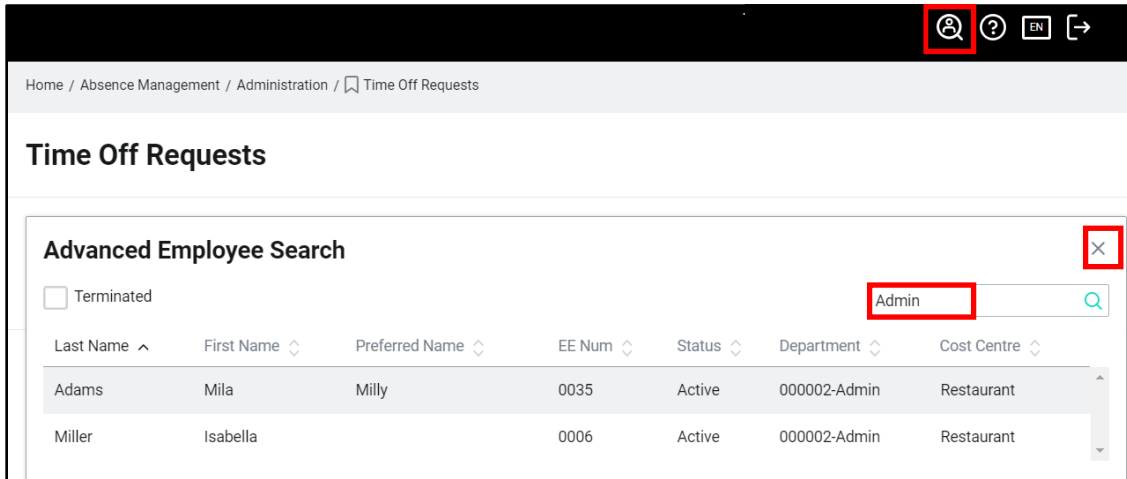


2. Select the employee by typing in their name or employee number from the **Select Employee** dropdown list.

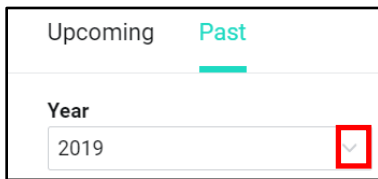


Use the Advanced Search function to search for employees based on other field criteria. For example, if you are looking for an employee in the Admin department, click the **Advanced Employee Search** icon, and type Admin in the search field. All records that contain the character string Admin displays.

Click the **X** to the top right of the advanced search filed will return you to the Select Employee dropdown list.



3. Review the Upcoming and Past Time Off Requests submissions. Select a year from the dropdown list.



### Sorting the Time Off Requests

4. Click on any column header to sort the holiday table. The **^** (ascending) and the **v** (descending) indicates the table sort order.

Status	Type	From ^	To	Start	End	Total Hrs	Duration
	Bereavement	Thu Jan 24, 2019	Tue Jan 29, 2019	8:00 am	4:00 pm	—	—
v							
	Vacation	Wed Jan 30, 2019	Wed Jan 30, 2019	8:00 am	4:00 pm	7.00	1 day
	Sick	Thu Jan 31, 2019	Thu Jan 31, 2019	8:00 am	4:00 pm	7.00	1 day
	Sick	Tue Feb 5, 2019	Tue Feb 5, 2019	8:00 am	4:00 pm	7.00	1 day
	Sick	Wed Feb 6, 2019	Wed Feb 6, 2019	8:00 am	4:00 pm	7.00	1 day
	Vacation	Fri Dec 27, 2019	Fri Dec 27, 2019	8:00 am	4:00 pm	7.00	1 day



## Editing a Time Off Request

1. Click on a Time off Request in the table.

	Absent from work	Wed Jan 30, 2019	Wed Jan 30, 2019	8:00 am	12:00 pm	3.50	1 day
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2. Modify the Overview tab as required. You can alter the hours for the time off request on the Details tab.

### Edit Time Off Request ✕

Overview Details

Include	Type	Start	End	Breaks ⓘ	Hours	
<b>Wed Jan 30, 2019</b>						
	Typical work day	8:00 am	4:00 pm	60		
<input checked="" type="checkbox"/>	Time off request	8:00 am	12:00 pm	<input type="text" value="30"/>	3.50	
		1 day		3.50 hrs/day		3.50 total hrs

CLOSE MORE ▾ SAVE

3. Click **MORE** to change the status of the Time Off Request.

### Edit Time Off Request ✕

Overview Details

**Time Off Type**  
 Absent from work ▾

**From** Wed Jan 30, 2019 📅 **To** Wed Jan 30, 2019 📅

1 day | 3.50 hrs/day | 3.50 total hrs 🕒

Comments (1) ▾ +

**rachel.wolman@payworks.lan**  
 Thu Jan 24, 2019 1:53 pm  
 (Edited on Thu Jan 24, 2019 2:44 pm)

Employee comment

Confidential Comments (0) > +

Delete  
Withdraw  
Deny

Send employee time off request information

CLOSE MORE ▾ SAVE

4. Click **SAVE**.

## Multi-Day Time Off Request

To identify that a time off Request spans multiple days, an accordion indicator displays below the request.

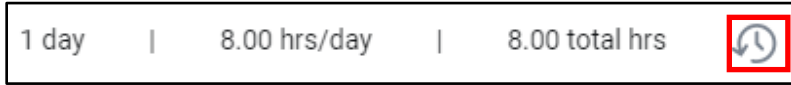
1. Click the accordion icon to display the child records.
2. Click an individual entry to display the Overview tab and Details tab for that day.

Status	Type	From	To	Start	End	Total Hrs	Duration
	Bereavement	Thu Jan 24, 2019	Tue Jan 29, 2019	8:00 am	4:00 pm	--	--
	Bereavement	Thu Jan 24, 2019	Tue Jan 29, 2019	8:00 am	4:00 pm	--	--
	Bereavement	Thu Jan 24, 2019	Thu Jan 24, 2019	8:00 am	4:00 pm	7.00	1 day
	Bereavement	Fri Jan 25, 2019	Fri Jan 25, 2019	8:00 am	4:00 pm	7.00	1 day
	Bereavement	Sat Jan 26, 2019	Sat Jan 26, 2019	8:00 am	4:00 pm	7.00	1 day
	Bereavement	Sun Jan 27, 2019	Sun Jan 27, 2019	8:00 am	4:00 pm	7.00	1 day
	Bereavement	Mon Jan 28, 2019	Mon Jan 28, 2019	8:00 am	4:00 pm	7.00	1 day
	Bereavement	Tue Jan 29, 2019	Tue Jan 29, 2019	8:00 am	4:00 pm	7.00	1 day
	Absent from work	Wed Jan 30, 2019	Wed Jan 30, 2019	8:00 am	12:00 pm	3.50	1 day
	Sick	Thu Jan 31, 2019	Thu Jan 31, 2019	8:00 am	4:00 pm	7.00	1 day
	Sick	Tue Feb 5, 2019	Tue Feb 5, 2019	8:00 am	4:00 pm	7.00	1 day

3. Click the accordion icon to collapse the child records.

## Tracking Changes

When working with employee time off requests, clicking the view changes icon on the Overview tab displays the activity for that request.



Activity displayed includes the time off type, status, date, start and end times, and if the time off request was processed by payroll. Each activity indicates the date and time and who made the change.

Change Tracking <span style="float: right;">×</span>				
Field	Previous	Updated	By	Date
TOR Submitted	---	---	janet.smithson@payworks.lan	Thu Jan 24, 2019 1:34 pm
Status	Pending	Approved	System Approved	Thu Jan 24, 2019 1:34 pm

[Export Table](#) CLOSE

To export the table, click Export Table to export the table to an Excel CVS file.

## Resolving Scheduling Conflicts

If the employee has scheduled shifts, click the **Resolve** hyperlink or click the Details tab to view their scheduled shifts, as well as delete, reassign, or unassign them.

The status of the time off request determines which of the following buttons are available:

- Approve: Changes the status of the time off request to approved
- Deny: Changes the status of the time off request to denied
- Update: Applies changes made to the time off request, but status remains unchanged
- Withdraw: Changes the status of the time off request to withdrawn
- Approve  
Withdrawal: Changes the status of the time off request from pending withdrawal to a withdrawn
- Deny  
Withdrawal: Changes the status of the time off request from pending withdrawal back to approved
- Delete: Removes the time off request from the screen



A time off request pending withdrawal is processed in the same way as an approved time off request.

1. Select the type off time of requested from the Time Off Type dropdown list.
2. Click **Resolve**.

### New Time Off Request ✕

[Overview](#) [Details ⓘ](#)

ⓘ Schedule Conflicts Resolve

**Employee Name** ⓘ  
Addison Hill - 0032

**Time Off Type**  
Sick

**From** Sat Feb 9, 2019 📅 **To** Sat Feb 9, 2019 📅 | 1 day | 13.00 hrs/day | 13.00 total hrs

Comments (0) > +

Confidential Comments (0) > +

Send employee time off request information

Accrual Balance	-
Projected Total Requested	-

CLOSE SAVE

The Details for the time off request displays.

3. Modify the request information as necessary to meet the shift obligations.

① You can click on the shift and select another employee to reassign the shift, and save.

OR

② You can modify the start time, end time or unpaid breaks for the request.

OR

③ You can leave the scheduled shifts unchanged, remove the scheduled shifts or unassign the shift. For multi-day requests, all shifts that fall on days with time off requests will be removed or unassigned accordingly.

### New Time Off Request ×

Overview Details ⓘ

Include	Type	Start	End	Breaks ⓘ	Hours
<b>Sat Feb 9, 2019</b>					
<input type="radio"/>	Host <span style="color: red;">①</span>	8:00 am	2:30 pm	0	
<input type="radio"/>	Host	4:00 pm	<span style="color: red;">②</span> 10:30 pm	0	
<input checked="" type="checkbox"/>	Time off request	8:00 am ⓘ	2:30 pm ⓘ	<input type="text" value="0"/>	6.50
<input checked="" type="checkbox"/>	Time off request	4:00 pm ⓘ	10:30 pm ⓘ	<input type="text" value="0"/>	6.50
1 day			13.00 hrs/day		13.00 total hrs

③

Leave scheduled shifts unchanged

Delete scheduled shifts for requested time off

Unassign scheduled shifts for requested time off

CLOSE
SAVE

4. Click **SAVE** to save the changes, or **CLOSE** and **DISCARD** to leave unchanged.

## Balances

At the bottom the Upcoming tab of a specific employee's time off requests is the Accrual Balances information.

**Accrual Balance:** Reflects the amount available for use as of the last pay period ending date.

**Total Requested:** Sum of the upcoming approved and pending requests plus any past requests that created or modified in the current pay period.

Upcoming		Past					
Status	Type	From	To	Start	End	Total Hrs	Duration
✓	Vacation	Mon Feb 11, 2019	Fri Feb 15, 2019	–	5:30 pm	41.00	5 days
✓	Family	Tue Feb 19, 2019	Tue Feb 19, 2019	9:00 am	5:30 pm	8.00	1 day
✓	Vacation	Wed Feb 20, 2019	Wed Feb 20, 2019	9:00 am	5:30 pm	8.00	1 day
✓	Sick	Wed Feb 27, 2019	Wed Feb 27, 2019	9:00 am	5:30 pm	8.00	1 day
✓	Vacation	Mon May 6, 2019	Fri May 24, 2019	–	5:30 pm	106.00	13 days

Balances ⓘ		
as of Fri Jan 11, 2019		
Type	Accrual Balance	Total Requested
Vacation	\$1994.72	\$3450.69

At the bottom of the Past tab of a specific employee

**Used:** The amount of approved time off as of your last pay period ending date not including any upcoming requests for the calendar year selected.

**Accrual Balance:** The unused amount of time off as of your last pay period ending date for the calendar year selected.

Upcoming		Past					
Status	Type	From	To	Start	End	Total Hrs	Duration
There are no time off requests to display							

2019 ⓘ		
Summary as of Fri Jan 11, 2019		
Type	Used	Accrual Balance
Vacation	\$0.00	\$1994.72

When adding a new time off request, the Projected Total Requested value = Upcoming approved requests + pending requests + past requests created or modified in the current pay period for the selected time off type, including the amount of the request.

### New Time Off Request

Overview Details

Time Off Type: Vacation

From: Thu Nov 22, 2018 To: Thu Nov 22, 2018

1 day | 8.00 hrs/day | 8.00 total hrs

Comments (0) +

Confidential Comments (0) +

Send employee time off request information

Recipients for TOR Notification

Punch Demo  Randi Sorenson

Accrual Balance as of Oct 05, 2018	\$29.52
<b>Projected Total Requested</b>	<b>\$3936.00</b>

CLOSE SAVE