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

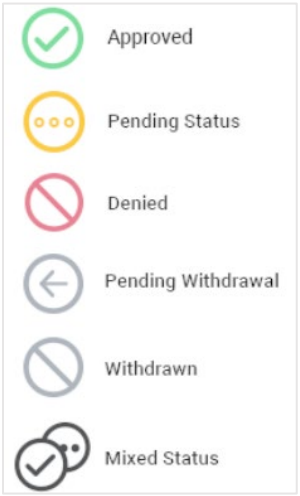
Overview

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:

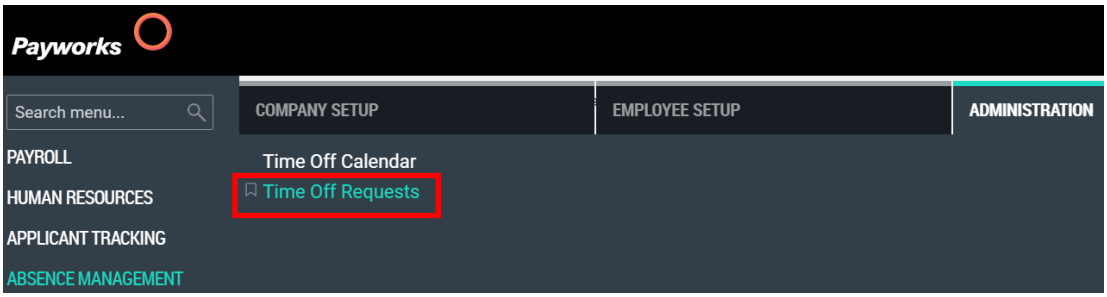
Approved:	Employee request for time off is granted
Pending Status:	Employee request is waiting for approval or denial
Denied:	Employee request was rejected
Pending Withdrawal:	Employee request to cancel time off request is waiting for approval or denial
Withdrawn:	Employee request to cancel time off request is approved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



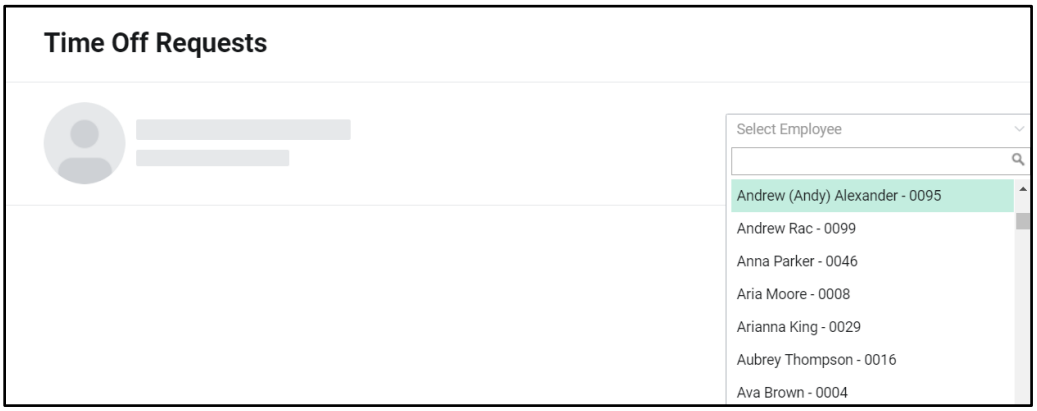
Creating a Time Off Request on Behalf of Your Employee

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.**

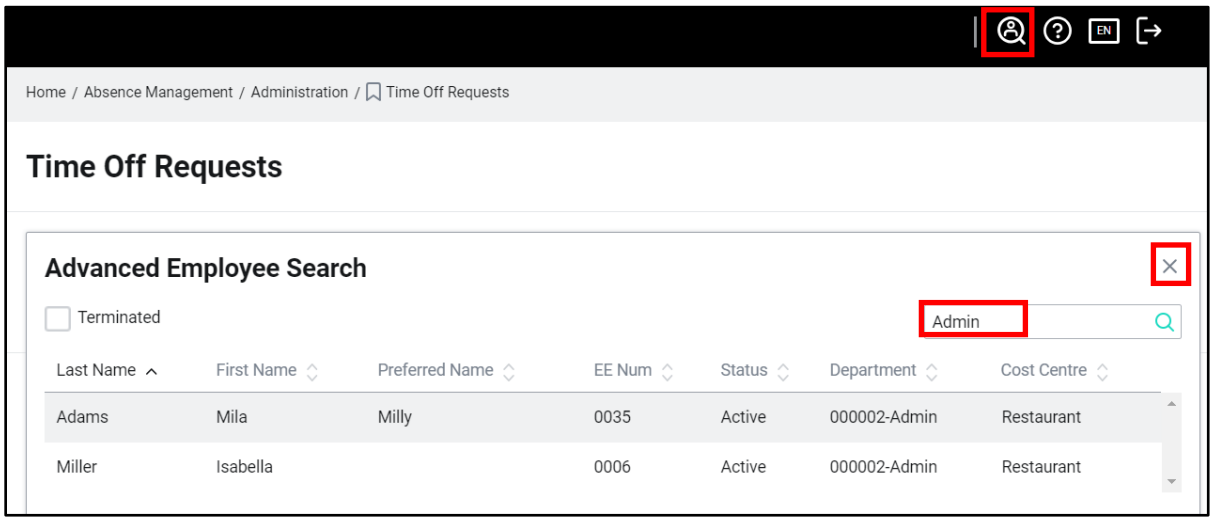


2. Select the employee by typing in the employee's first name, last name, preferred name or employee number their name or employee number from the **Select Employee** dropdown list.



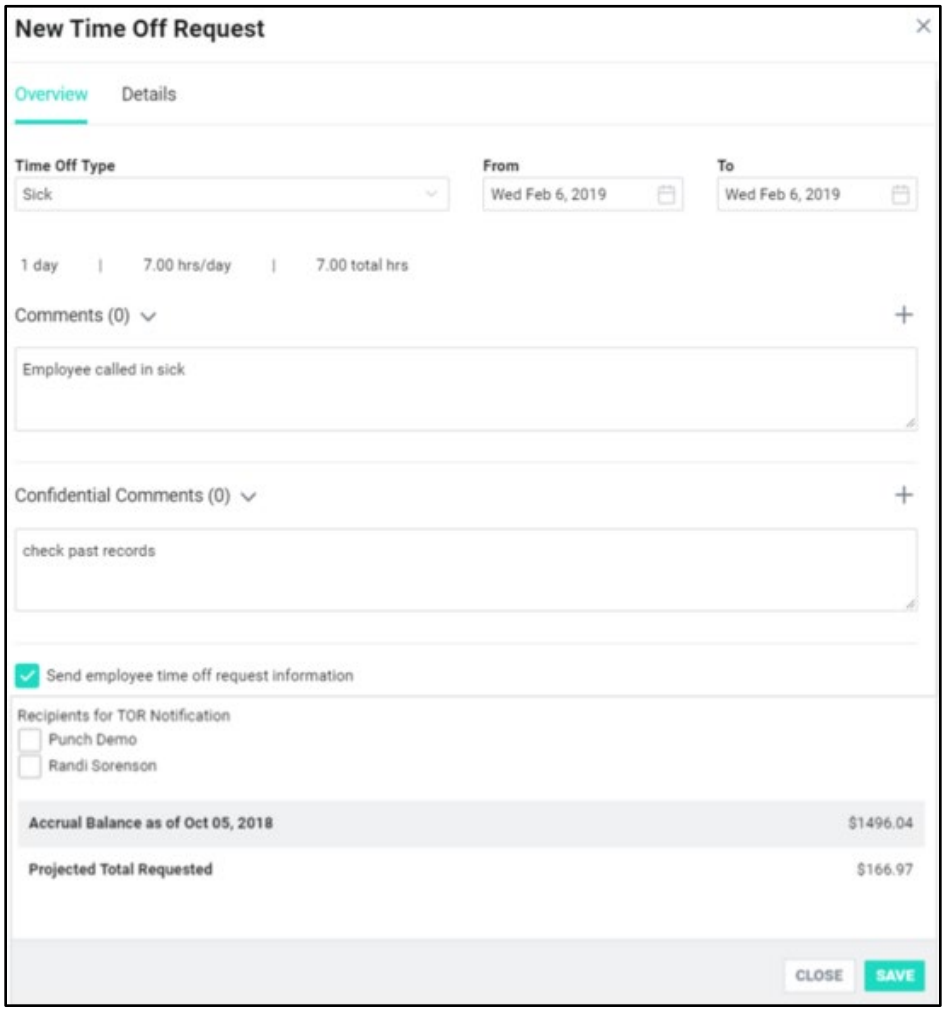
Use the Advanced Search function to search for employees based on other field criteria. For example, if you are looking for an employee in the Admin department, click the **Advanced Employee Search** icon, and type **Admin** in the search field. All records that contain the character string Admin displays.

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



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

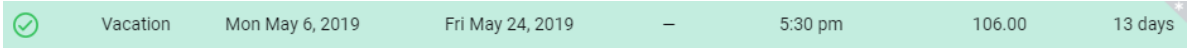
4. Select the **Time Off Type** from the dropdown list, in this example, select **Sick**.
5. Modify the **From** and **To** dates to reflect today's date (or multiple days if known).
6. Add comments (optional).
7. Add Confidential Comments (comment the employee will not see - optional).
8. The Send employee 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.

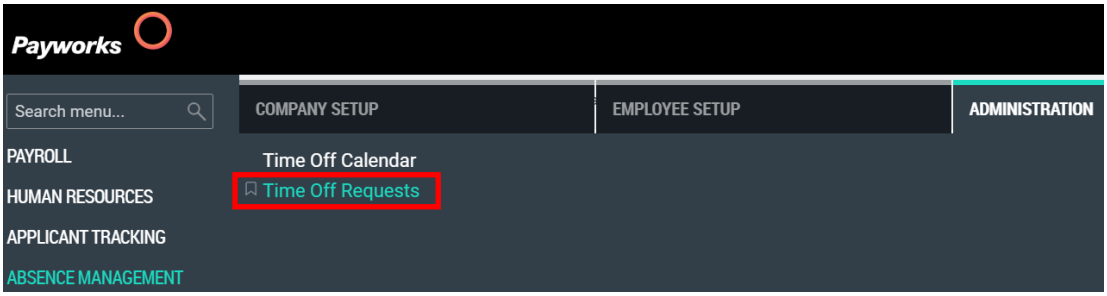
10. Click **SAVE.**
The time off request is automatically approved. The asterisk (*) in the top right corner indicates that a Confidential Comment exists.



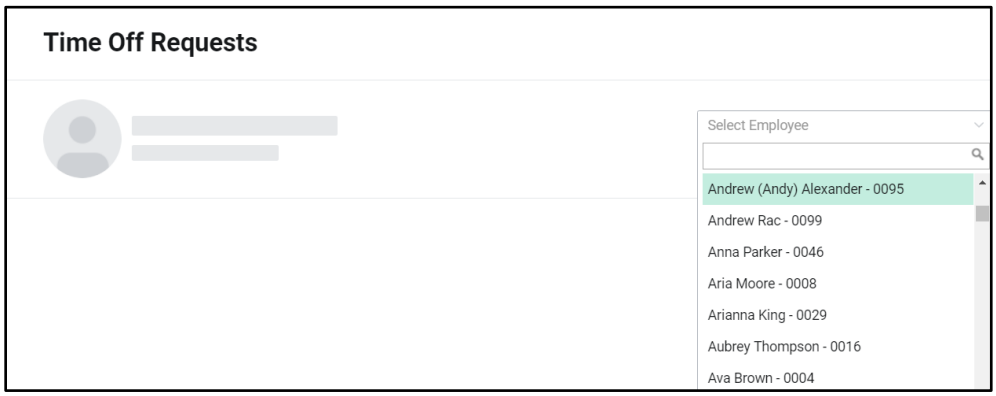
Reviewing an Employee's Time Off Requests

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.



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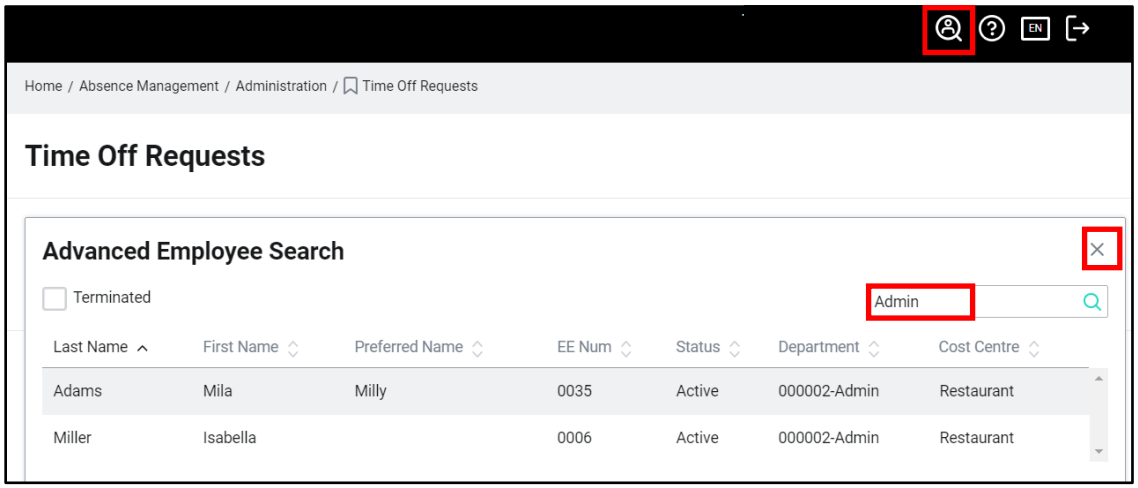
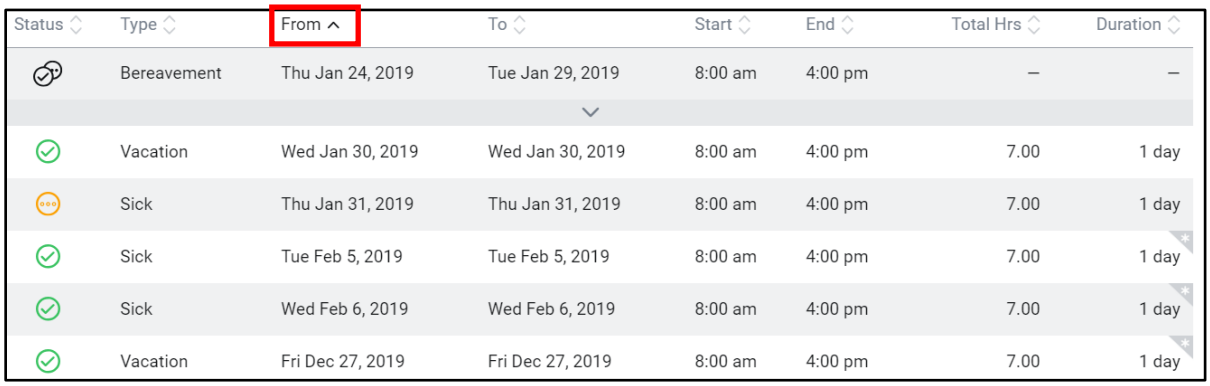


3. Review the Upcoming and Past Time Off Requests submissions. Select a year from the dropdown list.

Sorting the Time Off Requests

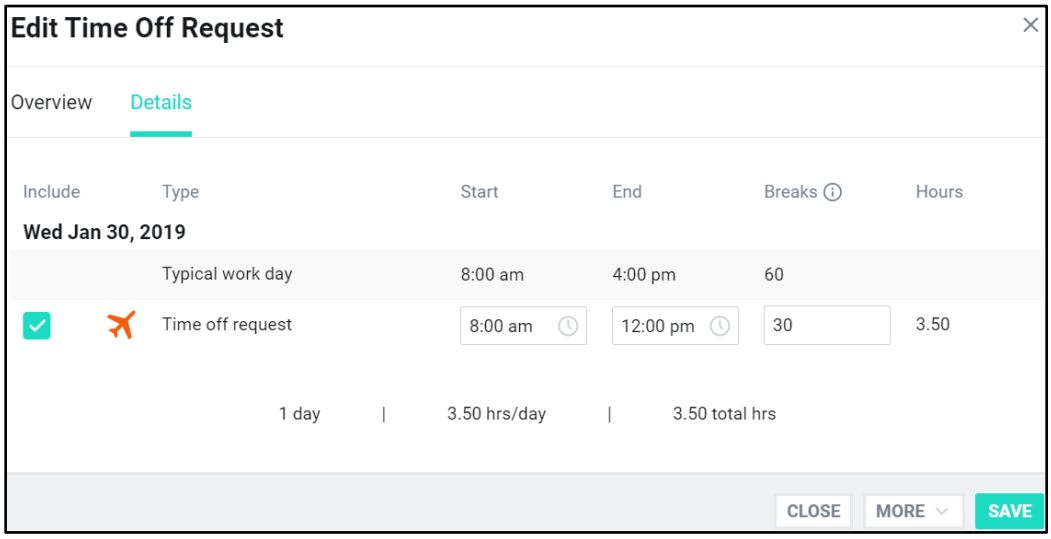
4. Click on any column header to sort the holiday table. The **^** (ascending) and the **v** (descending) indicates the table sort order.



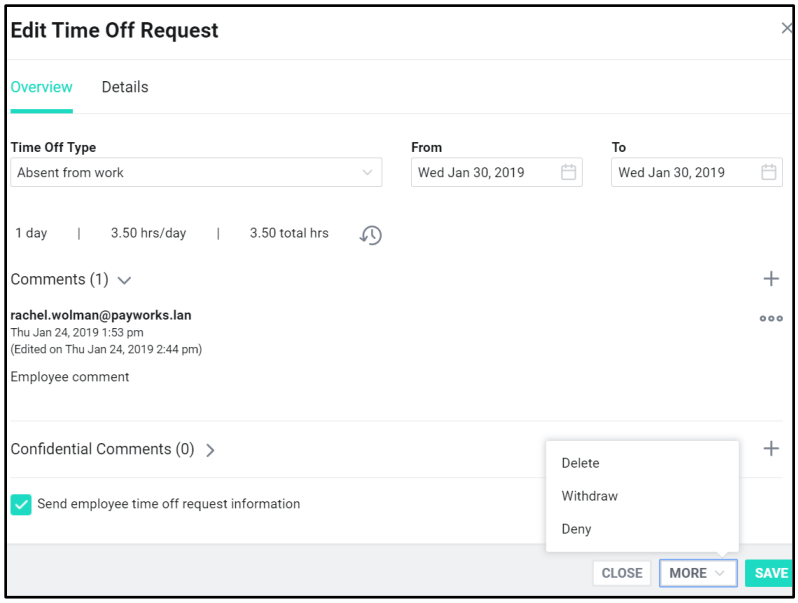
Editing a Time Off Request

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

2. Modify the Overview tab as required. You can alter the hours for the time off request on the Details tab.



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

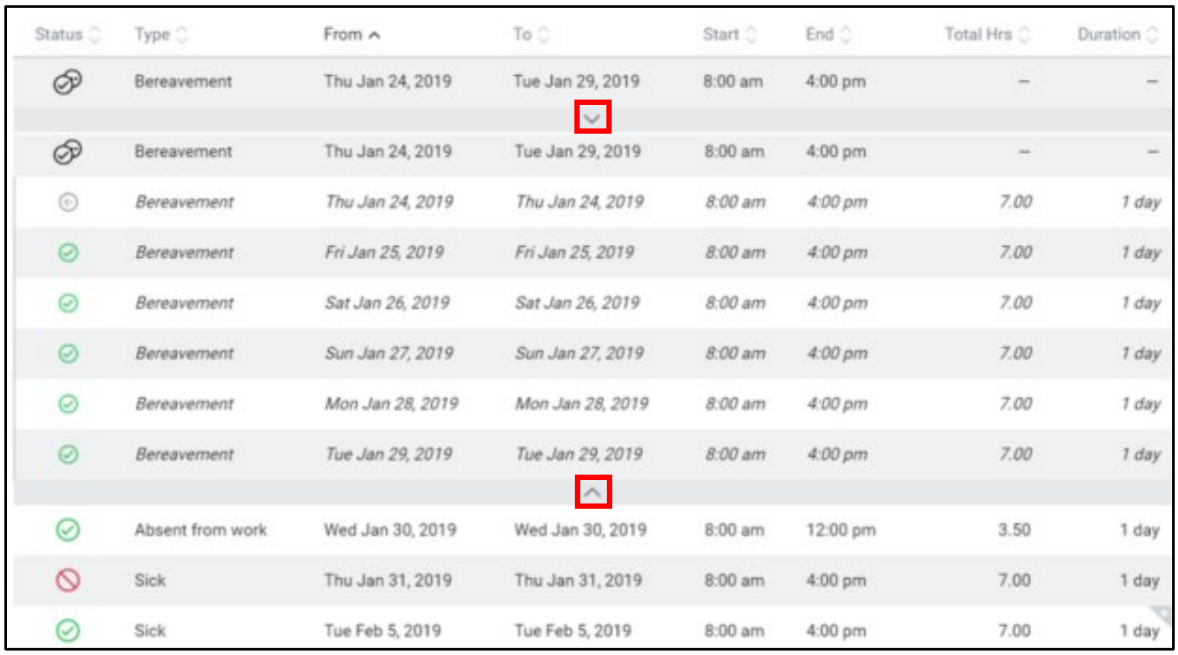


4. Click **SAVE**.

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.



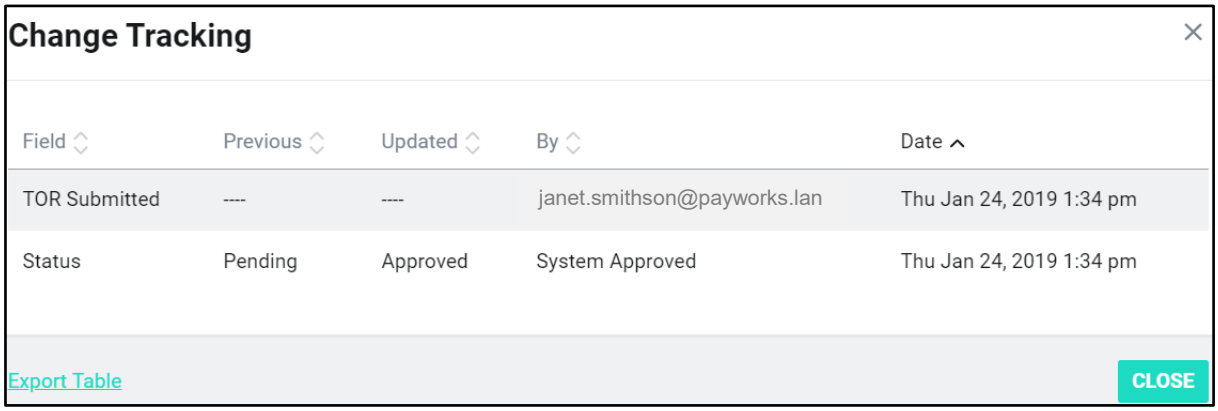
Status	Type	From	To	Start	End	Total Hrs	Duration
	Bereavement	Thu Jan 24, 2019	Tue Jan 29, 2019	8:00 am	4:00 pm	–	–
	Bereavement	Thu Jan 24, 2019	Tue Jan 29, 2019	8:00 am	4:00 pm	–	–
	Bereavement	*Thu Jan 24, 2019*	*Thu Jan 24, 2019*	*8:00 am*	*4:00 pm*	*7.00*	*1 day*
	Bereavement	*Fri Jan 25, 2019*	*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.



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

Resolving Scheduling Conflicts

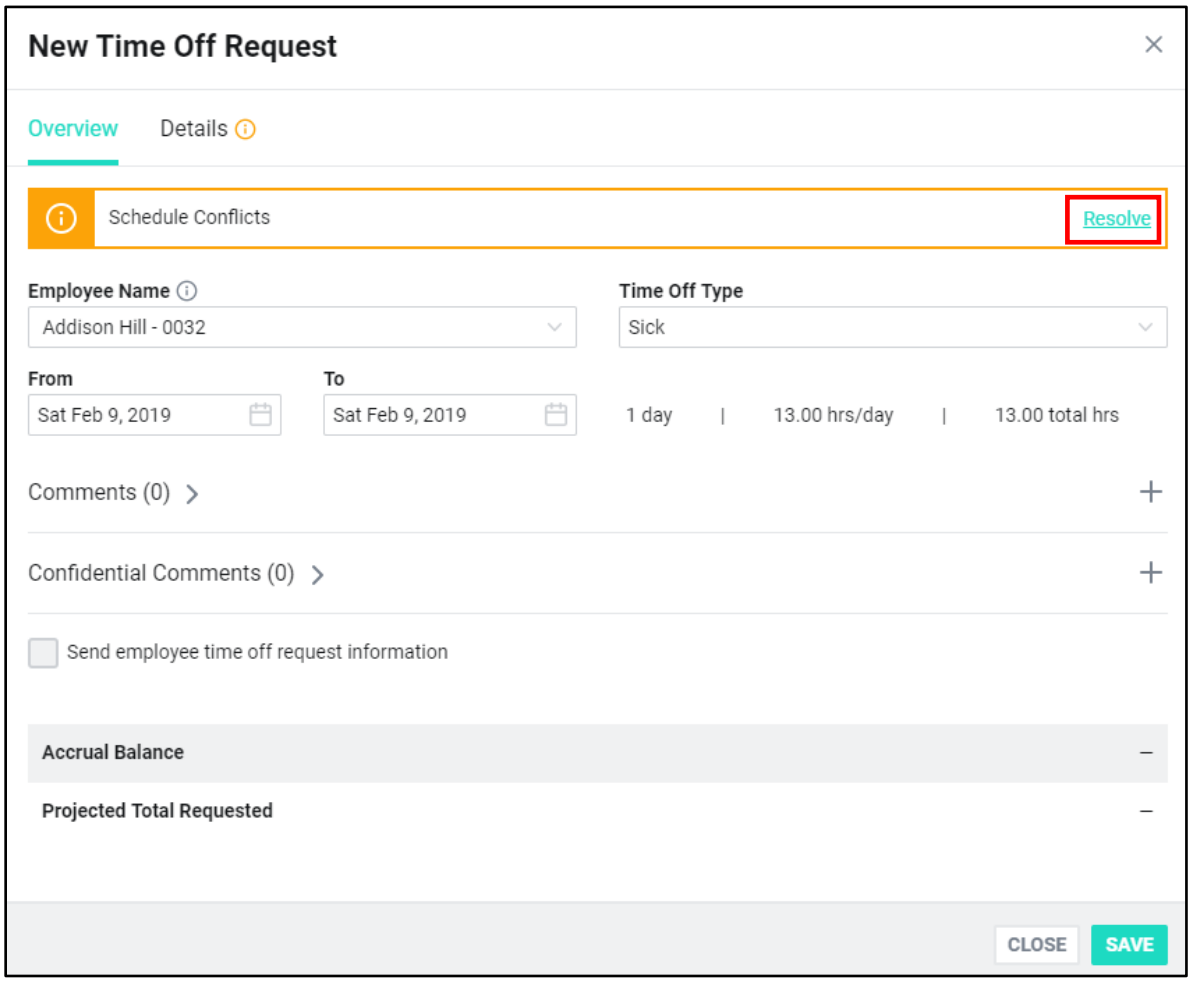
If the employee has scheduled shifts, click the **Resolve** hyperlink or click the Details tab to view their scheduled shifts, as well as delete, reassign, or unassign them.

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**.



The Details for the time off request displays.

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

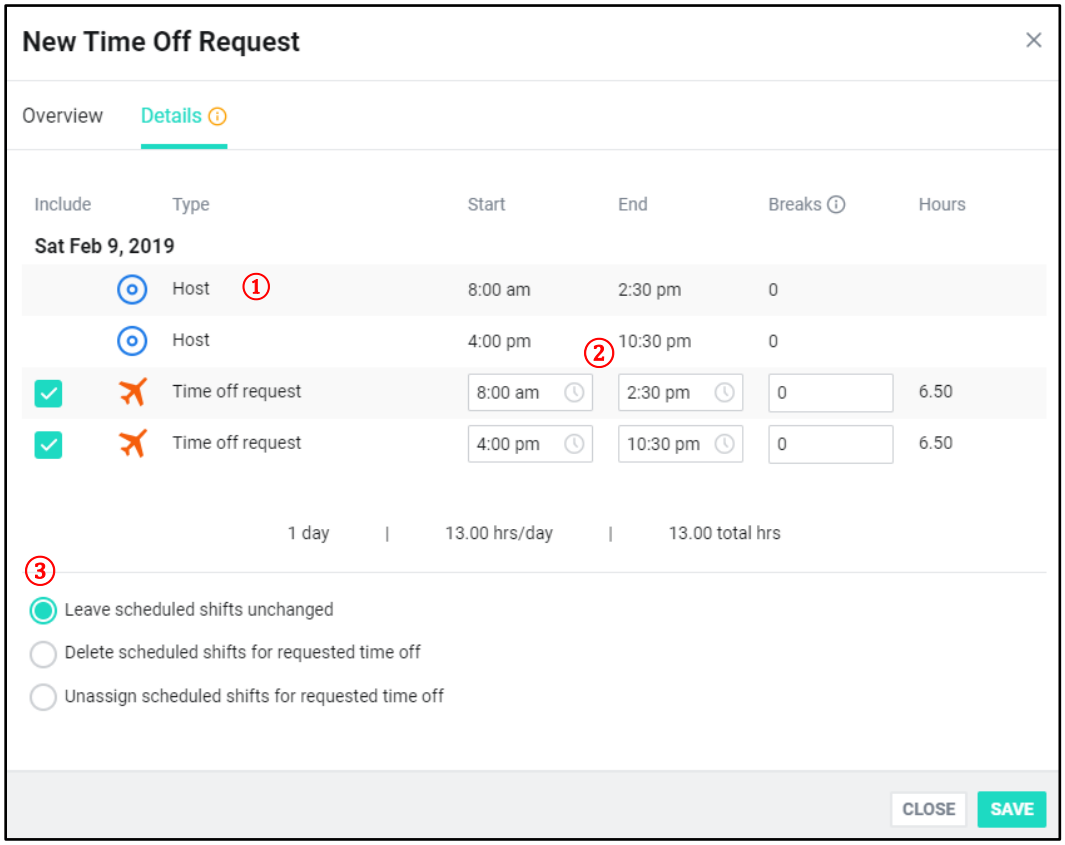
① You can click on the shift and select another employee to reassign the shift, and save.

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.



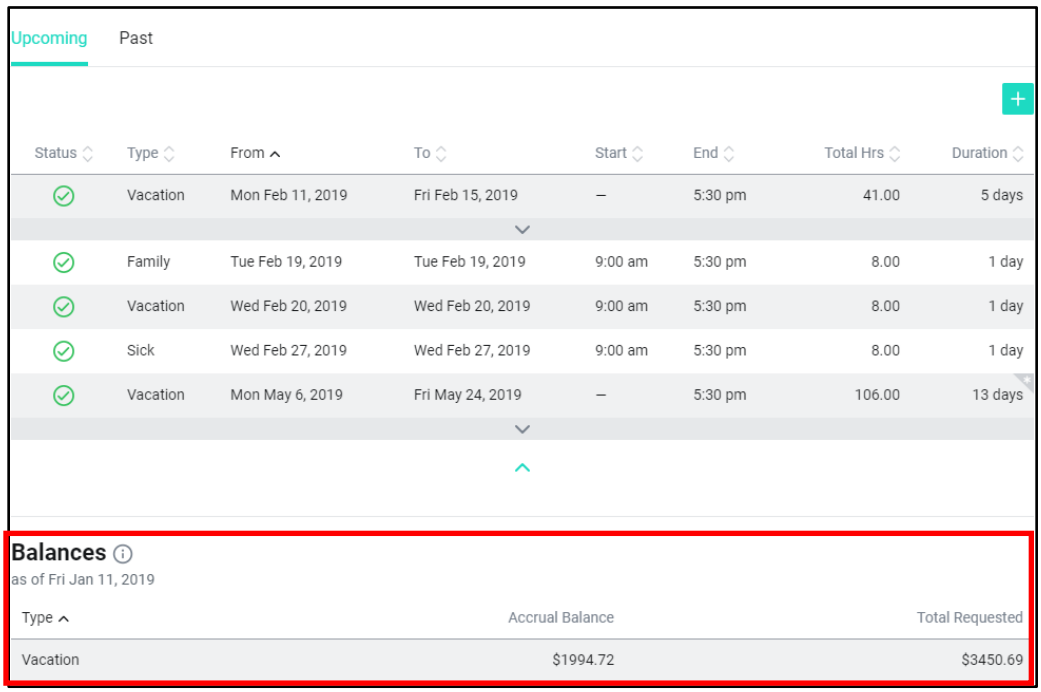
4. Click **SAVE** to save the changes, or **CLOSE** and **DISCARD** to leave unchanged.

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.

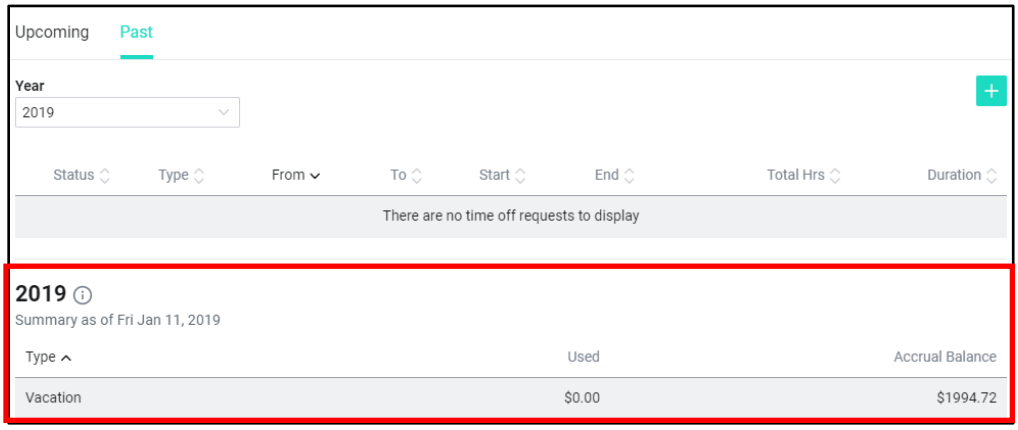
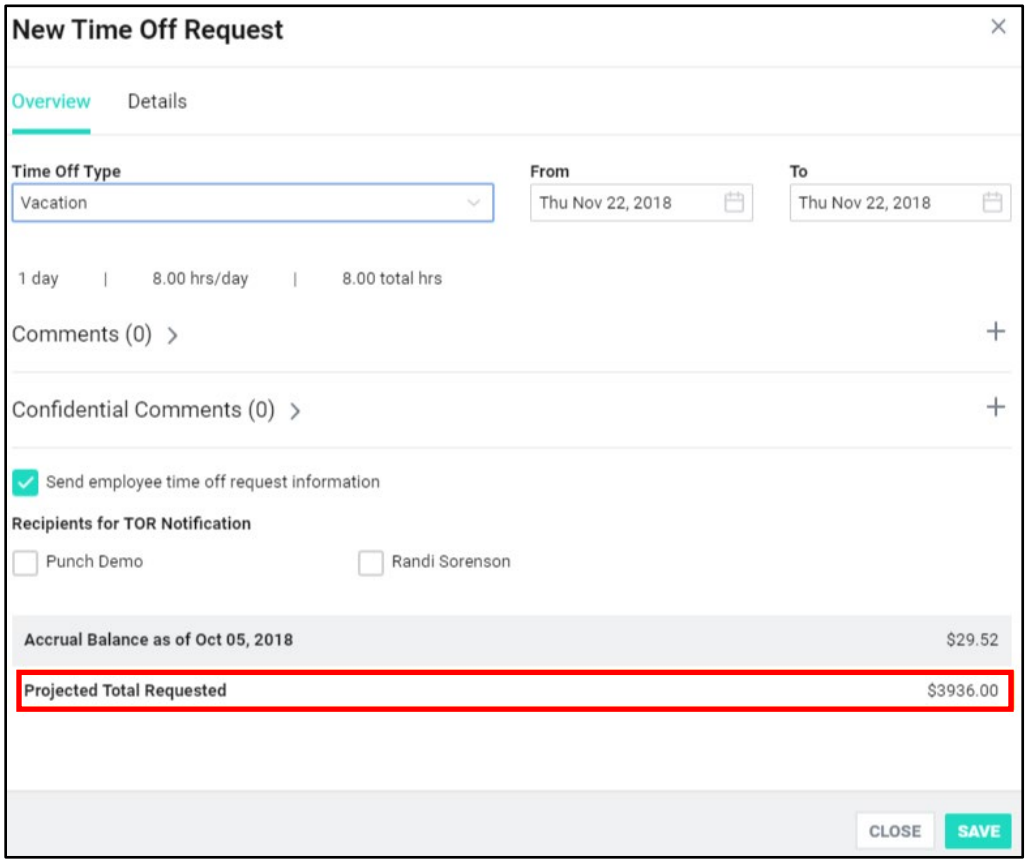
Total Requested: Sum of the upcoming approved and pending requests plus any past requests that created or modified in the current pay period.



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.



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.