Opening a Leave case

Purpose:
This job aid will help you get started with block leaves in Kronos

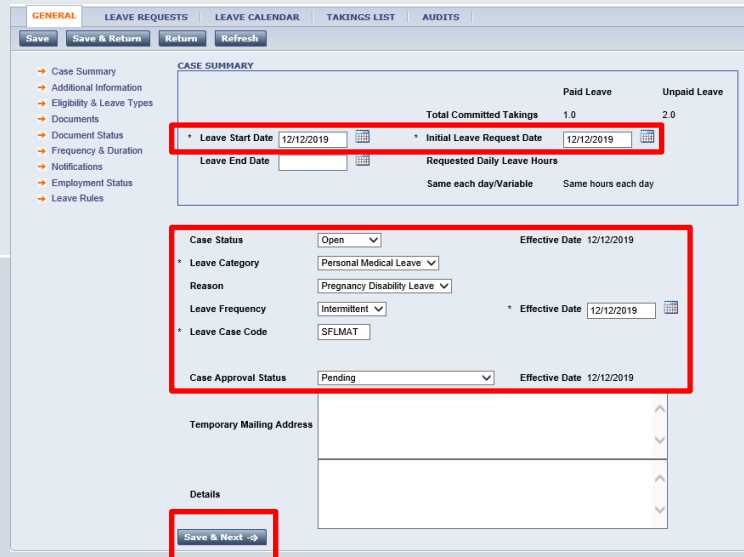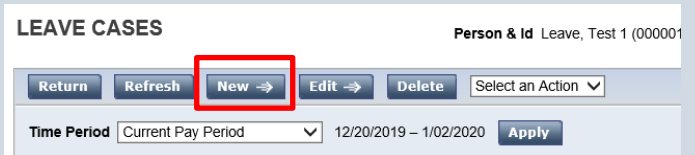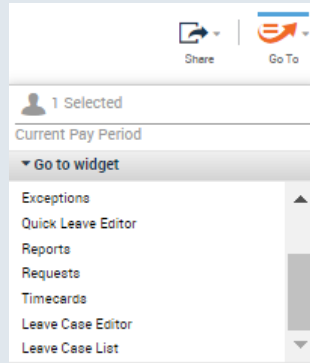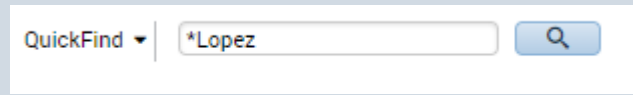| Steps	Screenshots
Use the QuickFind to select the employee you want to open a leave case for	QuickFind ▼ *Lopez 🔍
Select the employee you want to use and use the GoTo button to navigate to the leave case list.	Share Go To 👤 1 Selected Current Pay Period ▼ Go to widget Exceptions Quick Leave Editor Reports Requests Timecards Leave Case Editor Leave Case List
From the leave case menu select the New button to create a new case.	**LEAVE CASES** Person & Id Leave, Test 1 (000001 Return Refresh New ⇒ Edit ⇒ Delete Select an Action ✔ Time Period Current Pay Period ✔ 12/20/2019 – 1/02/2020 Apply
In the Leave Case Editor, the fields marked with an asterisk are mandatory. Make sure you update all the required dates, the leave category, frequency and reason. To confirm the leave category and reason refer to the first step in the following page. The case approval status is for your reference only and can be updated to approved. **The Frequency will need to be set to intermittent.** This will allow Supervisors and Employees to add time leave time using the quick leave editor. Then hit **Save & Next**. This will automatically take you to the additional information tab. Note: If you are editing an existing case, make sure you set the status of the case to open.	GENERAL LEAVE REQUESTS LEAVE CALENDAR TAKINGS LIST AUDITS Save Save & Return Return Refresh → Case Summary **CASE SUMMARY** → Additional Information → Eligibility & Leave Types Paid Leave Unpaid Leave → Documents Total Committed Takings 1.0 2.0 → Document Status * Leave Start Date 12/12/2019 * Initial Leave Request Date 12/12/2019 → Frequency & Duration Leave End Date Requested Daily Leave Hours → Notifications → Employment Status Same each day/Variable Same hours each day → Leave Rules Case Status Open ✔ Effective Date 12/12/2019 * Leave Category Personal Medical Leave ✔ Reason Pregnancy Disability Leave ✔ Leave Frequency Intermittent ✔ * Effective Date 12/12/2019 * Leave Case Code SFLMAT Case Approval Status Pending ✔ Effective Date 12/12/2019 Temporary Mailing Address Details Save & Next ⇒

Steps	Screenshots

Use the **Kronos Pay Code to TRC to Earn Code** mapping table found here to determine the leave category and reason based on the Core CT TRC. Search the table using the Core CT TRC code and then the Kronos Category field on the mapping table correlates to the Leave Category and the Kronos Reasons shows you what to enter for the Reason field in the Leave module. Once this is entered the Leave Case Code will populate automatically.

Kronos Category	Kronos				
	Kronos Reason	NEW KRONOS PAY CODE	Core-CT TRC	Core-CT Description	
Personal Medical Leave	Maternity	LV-Sick Leave Bank Combo	SCMBB	FMLA Combo Med. Sick Lv Bank	
Personal Medical Leave	Illness Injury	LV-Sick Leave Donation Combo	SCMD	FMLA Combo Med. Sick Donation	
Personal Medical Leave	Maternity	LV-Sick Leave Donation Combo	SCMDB	FMLA Combo Med. Sick Donation	
Personal Medical Leave	Illness Injury	LV-Sick Combo	SCMS	FMLA Combo Medical Sick	
Personal Medical Leave	Maternity	LV-Sick Combo	SCMSB	FMLA Combo Medical Sick	
Personal Medical Leave	Illness Injury	LV-Sick Leave Bank Federal	SFMB	FMLA Fed Med Sick Lv Bank	
Personal Medical Leave	Maternity	LV-Sick Leave Bank Federal	SFMBB	FMLA Fed Med Sick Lv Bank	

Additional Information – These are all optional fields for any required notes. After completing data entry click **Save & Next** to navigate to eligibility and leave types.

Eligibility & Leave Types – Can use this field to determine what leave types the employee is eligible based on their leave balances. Select **Bypass Eligibility Check** to choose the specific leave codes you want to use.

After about a year in Kronos once a history has been established you will be able to set the leave balance as of date to the one desired and then tap check eligibility

Steps	Screenshots
Select the pay codes that you plan to use, you will need to manually deselect all FMLA codes that you do not want to include. You can check the codes that have available balances by looking at the column on the right. After selecting the codes that you want to use click **Save & Next.**	

☐	LV-Holiday State	0.0	0.0
☐	LV-Personal Combo	0.0	0.0
☐	LV-Personal Federal	0.0	0.0
☐	LV-Personal SEBAC	0.0	0.0
☐	LV-Personal State	0.0	0.0
☑	LV-Sick Combo	0.0	10.0
☑	LV-Sick Federal	0.0	10.0
☑	LV-Sick Leave Bank Combo	0.0	0.0
☐	LV-Sick Leave Bank Federal	0.0	0.0
☐	LV-Sick Leave Bank SEBAC	0.0	0.0

-Through document and document status you can see what documents the employee has uploaded to support these leave cases, or you can forward documents or email the employee using the actions menu

GENERAL	LEAVE REQUESTS	LEAVE CALENDAR	TAKINGS LIST

Save | Save & Return | Return | Refresh | Select an Action ▼

→ Case Summary
→ Additional Information
→ Eligibility & Leave Types
→ Documents
→ Document Status
→ Frequency & Duration
→ Notifications
→ Employment Status
→ Leave Rules

DOCUMENTS

Leave Start Date 8/12/2020

Leave End Date <None>   Initial Leave Request Date 8/12/2020

☐ | Document Name / | Last Generated on Date/Time
This table currently contains no data.

Save & Next →

Frequency & Duration is also an optional field that allows you to enter leave time that recurs on an ongoing basis. This can also be done through projected takings which is coming up next.

FREQUENCY & DURATION

Leave Start Date 8/12/2020

Leave End Date <None>   Initial Leave Request Date 8/12/2020

Frequency: [____] times per [____] [____▼] Period
Duration: [____] hours or [____] day(s) per episode

Total Time
Total of [____] hours per [____▼] Period

Estimated Reduced Schedule
[____] hours per day; [____] days per week
from [____] 🗓 through [____] 🗓

* Start Date [8/12/2020] 🗓
Expiration Date [____] 🗓

Steps	Screenshots
Notifications – This section will allow you to enable notifications for yourself on this leave case. Examples of different leave notifications are leave employee limit approaching, or leave date approaching. Notifications will appear in the My Inbox section of My Information. After filing in this section, click on the **Leave Rules** tab shown here.	**NOTIFICATIONS** Leave Start Date 8/13/2020 Leave End Date <None> New Duplicate Save Notification Refresh Notification Delete Name Notification Type Date **NOTIFICATION DETAILS** * Name * Notification Description * Active ☑ * Notification Type → Notifications → Employment Status → Leave Rules
Leave rules need to be selected to determine what paid and unpaid leave types you want to use.	**LEAVE RULES** Leave Start Date 8/13/2020 Leave Frequency null as of 8/13/2020 Leave End Date <None> Initial Leave Request Date 8/13/2020 Leave Rule * Effective Date ● <None> 8/13/2020 Save

Select the rule with the correct paid and unpaid leave type, after selecting the Leave Rule, hit **Select & Return**.

Note: For an intermittent leave case, the last step in the process is clicking Save on the leave rule.

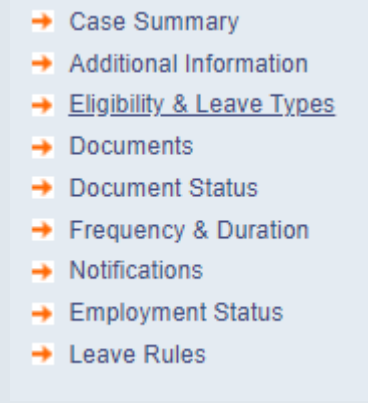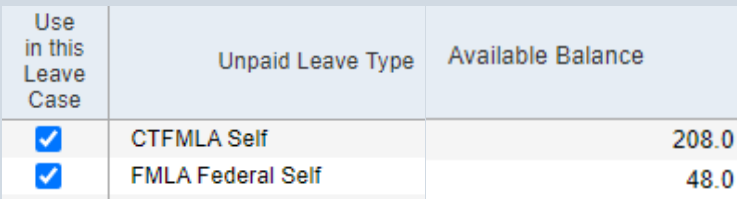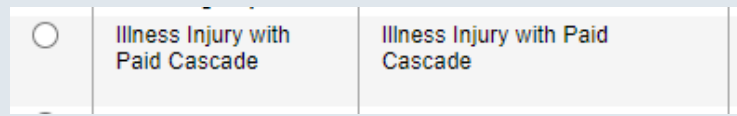|	Rule Name /	Description	Paid Leave Types
●	<None>		
○	Bone Marrow - Pre or Post - Medical Appointments	Bone Marrow - Pre or Post - Medical Appointments	LV-Sick Combo,LV-Sick Federal,LV-Sick SEBAC,LV-Sick State,LV-Unpaid Combo,LV-Unpaid Federal,LV-Unpaid SEBAC,LV-Unpaid State
○	Bone Marrow - Surgery and Recovery	Used for Surgery and Recovery not Pre-Donation Medical Appointments.	LV-Bone Marrow Donation

After adding the Leave Rule click **Save**.

Error Scenarios

Purpose:
When entering leave cases as intermittent there are three possible error scenarios you need to consider.
1. Missing Information in the Leave Case Set Up
2. Incorrect Projections to Timecard
3. Projected time that has not been committed

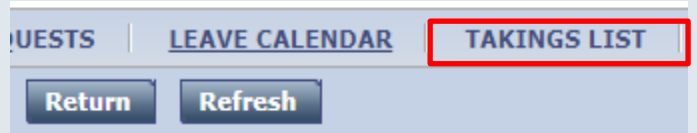| Steps	Screenshots
1. If the employee is missing information in the leave case set up, supervisors will receive the following error message.	**Quick Leave Editor** ▼ ❗ Employee has no leave cases in the selected time period.
1. There are three sections that are required where there could be an error, **Case Summary, Eligibility & Leave Types, & Leave Rules.**	→ Case Summary → Additional Information → Eligibility & Leave Types → Documents → Document Status → Frequency & Duration → Notifications → Employment Status → Leave Rules
1. Under Case Summary make sure all the information mentioned in the initial section is completed. Under Eligibility & Leave types, validate the correct leave codes are selected and that the tracking balances are not set to 0.	Use in this Leave Case / Unpaid Leave Type / Available Balance ☑ CTFMLA Self — 208.0 ☑ FMLA Federal Self — 48.0
1. Lastly, make sure that the correct leave rule is selected, this includes validating the codes you selected are listed under Paid Leave Types.	○ Illness Injury with Paid Cascade | Illness Injury with Paid Cascade

Steps	Screenshots
2. There are also scenarios where the employee or the supervisor adds time using the quick leave editor, but the wrong code ends up on the timesheet.	

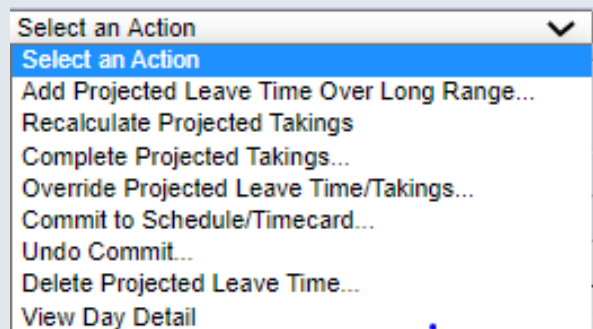| Steps	Screenshots
2. This can happen in scenarios where the employee should be getting Holiday Combo, but it is not added automatically. Go into the leave case, and open the takings list.	

2. The time is going to all be on the original bucket, in this case Sick Combo, if we want to move that to Holiday Comp Combo on any given day, we will need to override.

Date	Leave Time Amount	LV-Holiday Comp Combo	LV-Sick Combo
1/15/2021	8.0		8.0
1/18/2021	8.0		8.0
1/19/2021	8.0		8.0

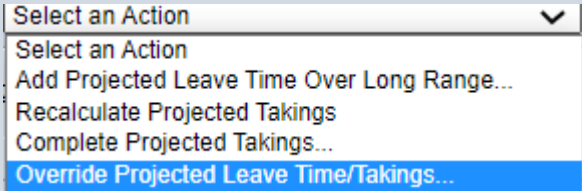| Steps	Screenshots
2. Click on the day you want to edit. Then click on the Select an Action drop down, and choose **Undo Commit.**	

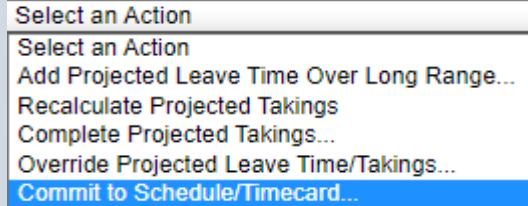| Steps	Screenshots
2. Now select the day you want to switch to holiday, and from the dropdown select **Override projected takings.**	Select an Action Select an Action Add Projected Leave Time Over Long Range... Recalculate Projected Takings Complete Projected Takings... Override Projected Leave Time/Takings...

2. Manually move the takings from the previous leave code, to the desired code; Holiday in this case.

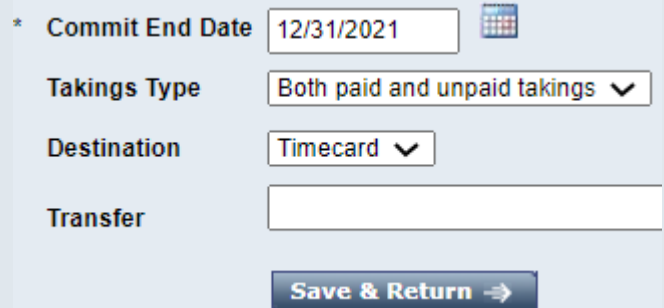|	Paid Leave	
*Leave Time Amount HH.hh	LV-Holiday Comp Combo	LV-Sick Co
8.0	8	

Steps	Screenshots
2. After you click save, go back to the select an action dropdown, and select Commit takings to schedule/timecard.	Select an Action Select an Action Add Projected Leave Time Over Long Range... Recalculate Projected Takings Complete Projected Takings... Override Projected Leave Time/Takings... Commit to Schedule/Timecard...
2. Click **Save & Return** and then your changes will appear on the timecard.	* Commit End Date 12/31/2021 Takings Type Both paid and unpaid takings ∨ Destination Timecard ∨ Transfer Save & Return ⇒

Steps	Screenshots
3. In the final scenario, the employee would receive this error message meaning there is projected time that has not been committed.	

⚠ One or more leave cases of the employee contain projected takings. Quick Leave Editor cannot be used until projections are committed from the full Leave Case Editor.

3. Navigate to the takings list on the leave case, and adjust the date range to be current year.

Time Period [Current Year ▼] 1/01/2021 – 12/31/2021 **Apply**

Steps	Screenshots
3. If any of the days are unbolded as shown here, they are projected time and will need to be deleted for the employee/supervisor to use the quick leave editor.	<table><tr><th></th><th>Day</th><th>Date</th><th>Leave Time Amount</th></tr><tr><td>☐</td><td>Fri</td><td>1/15/2021</td><td>8.0</td></tr><tr><td>☐</td><td>Mon</td><td>1/18/2021</td><td>8.0</td></tr><tr><td>☐</td><td>Tue</td><td>1/19/2021</td><td>8.0</td></tr></table>
3, Use the select an action drop down, and select **Delete Projected Leave Time**. After this is done, the quick leave editor will be working normally.	Select an Action ▼ Select an Action Add Projected Leave Time Over Long Range... Recalculate Projected Takings Complete Projected Takings... Override Projected Leave Time/Takings... Commit to Schedule/Timecard... Undo Commit... Delete Projected Leave Time... **Save & Return** **Return** **Refresh** 🔘 Delete Leave Time on selected days ⚪ * Delete all Leave Time forward starting **Save & Return →**

Quick Leave Editor

Purpose:
This job aid will help you get started using the Quick Leave Editor in Kronos.
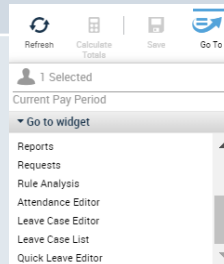
Steps	Screenshots
Once you have created an Intermittent leave case following the steps in the previous section, you can now use quick leave editor. Start on the employee's timecard and then select the Go To button on the top right. From there select the **Quick Leave Editor**.	
Enter the duration of the existing leave that you want to use on the day that you want to use it. Click Save after entering in the time.	
Navigate to the timecard to validate that the leave case processed correctly.	
If the time is not correct, use the Go To button to navigate to the leave case list, and edit the projected time as shown in the previous example	