

Time Off Requests

This guide will show you how to handle time off requests. This includes approving, creating, and cancelling.

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1. Approving time off requests
 2. Create time off requests
 3. Cancel approved requests
 4. Editing approved time off requests
 5. Time off report

Approving Time Off Request

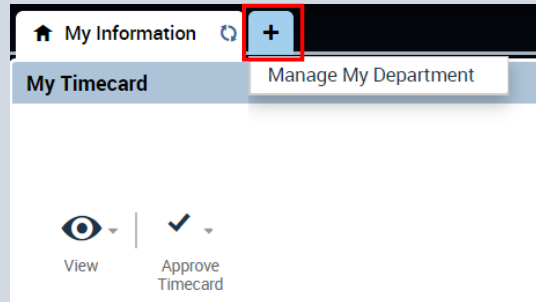
Purpose:

This job aid will help you resolve time off requests.

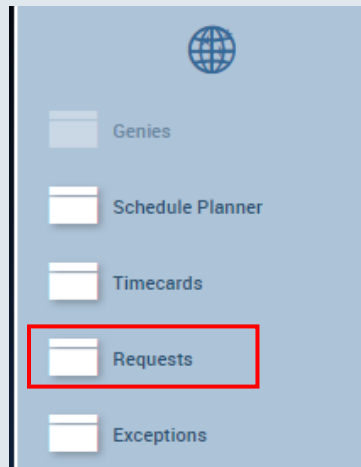
Steps

Screenshots

From the home page, click on the '+' and select Manage my Department



Navigate to the Related Items tab on the right side of the screen and go to **Requests**.



From the Requests tab, you will be able to view all Time off requests made. Select a request by clicking it once, which turns it blue, and then from the icons at the top of the page, you can select how you want to handle it.

A screenshot of the Requests management interface. At the top, there are two dropdown menus: 'Time-Off' and 'All Statuses (12)'. Below these are several action icons: an eye icon labeled 'Details', a pencil icon labeled 'Edit', a plus icon labeled 'Add Request', a checkmark icon labeled 'Approve', a crossed-out circle icon labeled 'Refuse', a pause icon labeled 'Pending', and a crossed-out X icon labeled 'Retract'. The 'Approve', 'Refuse', 'Pending', and 'Retract' icons are highlighted with a red box. Below the icons is a table with the following data:

Modified By (Userna...	Subject	Submit Date	Status
[Redacted]	Time Off Request Fu...	7/20/2020 1:47PM	Submitted

Create Time Off Requests

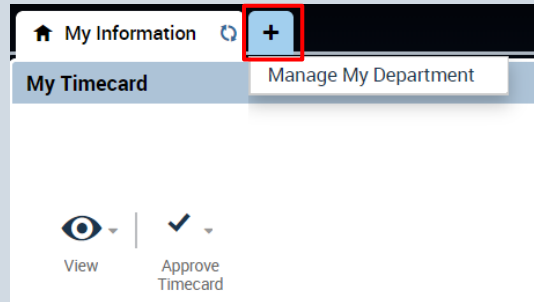
Purpose:

This job aid will help you edit and create time off requests.

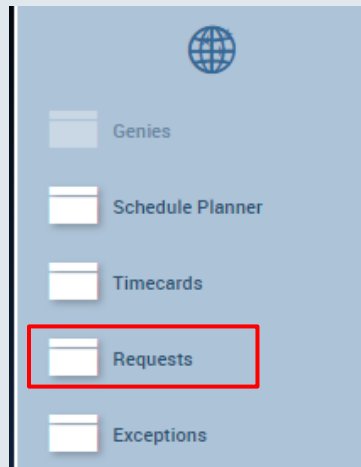
Steps

From the home page, click on the '+' and select Manage my Department

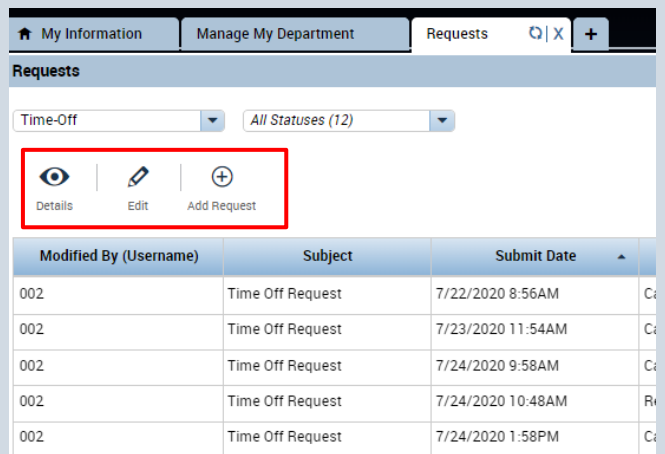
Screenshots



Navigate to the Related Items tab on the right side of the screen and go to **Requests**.



From the Requests tab, you will be able to view all Time off requests made. Select a request by clicking it once, which turns it blue, and then from the icons at the top of the page you can view **Details**, make **Edits**, and **Add New Requests**.



Steps

If you were to select Add Request, you will fill out all the required information. The first is the **Type**. There are two options the **Time Off Request Full Day** and **Time Off Request Partial Day**.

Under the Pay Code drop down, select the pay code from Administrative Leave, Furlough day, Sick day and more. Then select the start time and daily amount if applicable.

Once you finish, you press **Submit** in the bottom right hand corner.

Screenshots

Request Time Off

Type: **Time Off Request Full Day**

	Start date	End date	Pay code	Time Unit	Start time	Daily Amount
+ X	3/22/2021	3/22/2021	Vacation	Full day		

Accruals on: 3/22/2021

Accrual	Balance
50 Sick	118.53 Hour
51 Vacation	325.62 Hour
52 Personal	24.0 Hour

Note (optional)

Type a note (optional)

Cancel Submit

If you press edit, the **Edit Time-Off Request** window will pop up. Here you can edit status, dates, pay codes and see the accruals for whatever date you select.

Edit Time-Off Request

Status: Cancel Approved

Employee: Persona, Employee Type: Time Off Request

Start date	End date	Pay code	Time Unit	Start time	Daily Amount
8/03/2020	8/03/2020		Full day		

Accruals on: 8/03/2020

Accrual	Balance
Bone Marrow Donor	0.0 Hour
Comp Time	0.0 Hour
Comp Time Expired	0.0 Hour

Status History

- ✓ Cancel Approved: 7/24/2020 - 10:47:36AM
002
- ➔ Cancel Submitted: 7/24/2020 - 10:47:18AM
002
- ✓ Approved: 7/24/2020 - 10:46:26AM
002
- ➔ Submitted: 7/24/2020 - 9:58:54AM

Cancel Submit

Cancel Approved Time Off Requests

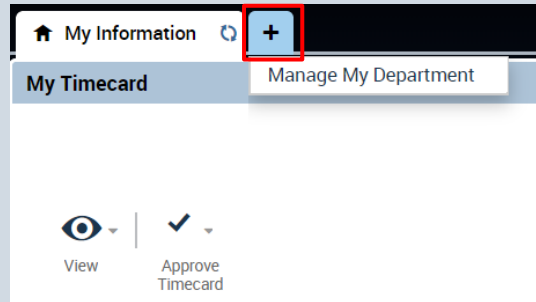
Purpose:

This job aid will help you cancel time off requests that have already been approved.

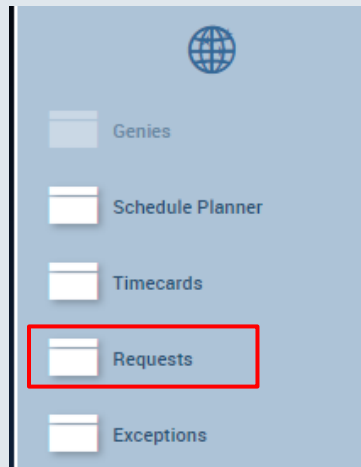
Steps

Screenshots

From the home page, click on the '+' and select Manage my Department

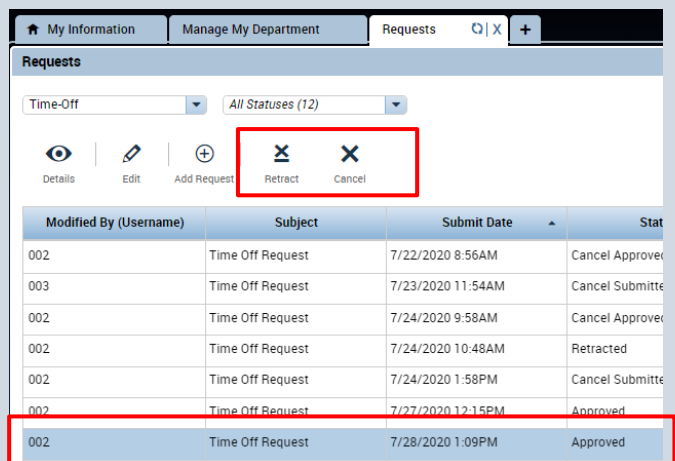


Navigate to the Related Items tab on the right side of the screen and go to **Requests**.



From the Requests tab, you will be able to view all Time off requests made. Select a request that has the status: **approved** by clicking it once, which turns it blue, and then from the icons at the top of the page you can either **cancel** the request or **retract** it.

It is recommended that supervisors cancel requests since retracting requests won't remove the Time off request from the timecard and won't update the pay codes.



Steps

If you press the Cancel icon, this window will pop up. Press **Cancel Request** in the bottom right corner.

Employees can also cancel their own requests under their My Calendar tab. This will be reviewed at the end of this section.

Screenshots

Cancel Time-Off Request

Approved: 7/28/2020 - 1:10:31PM
Modified by: 002

Employee: Persona, Employee Type: Time Off Request

Requested

Approved

Start date	End date	Pay code	Time Unit	Start time	Daily Amount
7/31/2020	7/31/2020	Administrative Le...	Full day		

Accruals on: 7/31/2020

Accrual	Balance
Bone Marrow Donor	0.0 Hour
Comp Time	0.0 Hour
Comp Time Expired	0.0 Hour

Status History

Approved: 7/28/2020 - 1:10:31PM
002

Submitted: 7/28/2020 - 1:09:36PM

Cancel **Cancel Request**

The Time off request will change status to Cancel Submitted. Now, the icons that appear next to Add Request will be **Cancel Approved**, **Cancel Retracted**, and **Cancel Pending**. To delete the request entirely press **Cancel Approved**.

If an employee cancels their own request the supervisor process of Approving the cancellation still applies.

My Information Manage My Department Requests

Requests

Time-Off All Statuses (12)

Details Edit Add Request **Cancel Approved** Cancel Refused Cancel Pending

Modified By (Username)	Subject	Submit Date	Status
002	Time Off Request	7/22/2020 8:56AM	Cancel Approved
003	Time Off Request	7/23/2020 11:54AM	Cancel Submitted
002	Time Off Request	7/24/2020 9:58AM	Cancel Approved
002	Time Off Request	7/24/2020 10:48AM	Retracted
002	Time Off Request	7/24/2020 1:58PM	Cancel Submitted
002	Time Off Request	7/27/2020 12:15PM	Approved
002	Time Off Request	7/28/2020 1:09PM	Cancel Submitted

The Cancel Approved icon will bring up the Approved Time-off Cancellation Request window. Press Cancel Approved in the lower right corner.

This will change the status to Cancel Approved and the time off request will not need any further actions.

Approve Time-Off Cancellation Request

Cancel Submitted: 7/24/2020 - 3:34:43PM
Modified by: 002

Employee: Tomomillo, Stefanie Type: Time Off Request

Requested

Approved

Start date	End date	Pay code	Time Unit	Start time	Daily Amount
7/24/2020	7/24/2020	Vacation	Full day		

Accruals on: 7/24/2020

Accrual	Balance
Bone Marrow Donor	0.0 Hour
Comp Time	0.0 Hour
Comp Time Expired	0.0 Hour

Status History

Cancel Submitted: 7/24/2020 - 3:34:43PM
002

Approved: 7/24/2020 - 1:58:13PM

Cancel **Cancel Approved**

Steps

If you press the Retract icon, this window will pop up. Press **Retract** in the bottom right corner.

Again, it is recommended to Cancel Request and not Retract it due to the fact that retractions won't remove the Time off from the timecard and won't update the pay codes.

Screenshots

The screenshot shows a 'Retract Time-Off Request' dialog box. At the top, it displays 'Approved: 7/27/2020 - 12:16:51PM' and 'Modified by: 002'. Below this, it shows 'Employee: Bell, Morgan T' and 'Type: Time Off Request'. There are two expandable sections: 'Requested' and 'Approved'. The 'Approved' section contains a table with the following data:

Start date	End date	Pay code	Time Unit	Start time	Daily Amount
8/06/2020	8/06/2020	Sick Appointments	Hours	10:00AM	2.0

Below the table, it shows 'Accruals on: 8/06/2020' and another table with columns 'Accrual' and 'Balance':

Accrual	Balance
Bone Marrow Donor	0.0 Hour
Comp Time	0.0 Hour
Comp Time Expired	0.0 Hour

At the bottom, there is a 'Status History' section with 'Approved: 7/27/2020 - 12:16:51PM' and 'Submitted: 7/27/2020 - 12:15:20PM'. In the bottom right corner, there are two buttons: 'Cancel' and 'Retract', with the 'Retract' button highlighted by a red box.

Once you retract the Time off request, this window will pop up. Press OK to continue.

The screenshot shows an 'Information' dialog box with a blue header. It contains an information icon (i) and the following text: 'The Time Off Request is now retracted. However, the time off pay code is still assigned to the employee and displayed in the Schedule. To correct, manually update the employee's Schedule.' At the bottom right, there is an 'OK' button highlighted by a red box.

In order to manually update the employees schedule, press the **Go To widget**, then **Schedule Planner**.

The screenshot shows a widget menu with a 'Share' button and a 'Go To' button. The 'Go To' button is highlighted by a red box. Below the buttons, there is a list of widgets: '1 Selected', 'Current Pay Period', 'Go to widget', 'Schedule Planner', 'Attendance Editor', 'Audits', and 'Exceptions'. The 'Schedule Planner' widget is highlighted by a red box.

Steps

Navigate to the **dates** of the Time off request.

Screenshots

7/31 - 8/06	
Wed 8/05	Thu 8/06
8:00AM - 4:30PM	8:00AM - 10:00AM Sick Appointments [2.0] 12:00PM - 4:30PM

Right click Time off request on each individual date and press **Delete** to remove the time off request from the employee schedule.

This will remove the time off request from the schedule and restore the pay codes.

Refresh View Comments

Bell, Morgan T
8:00AM - 10:00AM (8/06)
1. 8:00AM [2.0]: Regular

- Edit
- Delete**
- Cut
- Copy
- Paste
- Add shift
- Add Pay Code

Employees can cancel a request through their My Calendar widget by going to the dates of the request, right clicking on the Time Off request and pressing **Cancel request**.

This will show up in your request widget as shown below, and then you decide whether you want to approve their request to cancel.

Tue 7/28

Time Off Request [X] Time Of

Time Off Reque Details

Cancel request

8:00AM-4:00PM [8.00 h] Regular

8:00AM-4:00PM [8.00 h] Regular

003

Time Off Request

7/29/2020 12:13AM

Cancel Submitted

Persona, Employee

Edit Approved Time Off Requests

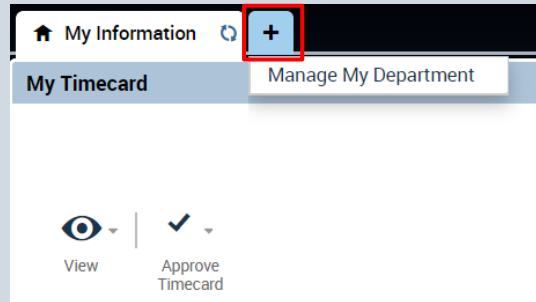
Purpose:

This job aid will help you edit a time off request you already approved.

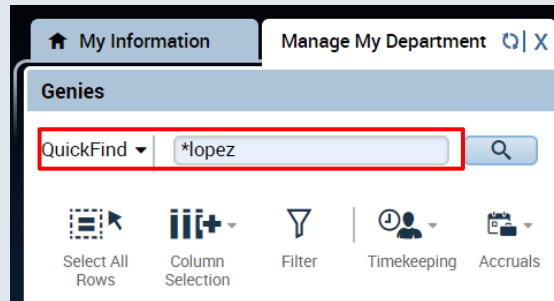
Steps

Screenshots

Click on the '+' and select Manage my Department

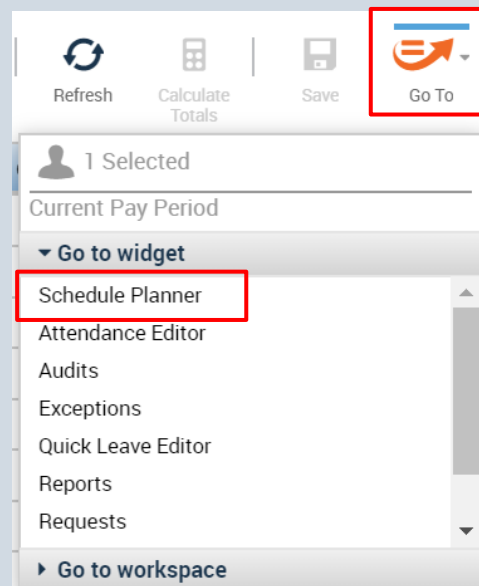


Find the employee by using the QuickFind window and inserting their name or employee ID.



Click on their name once to select them.

On the right side of the window, select the Go To drop down menu and choose "Schedule Planner"



Steps

Navigate to the **dates** of the Time off request.

If you want to edit the Time off request without deleting the whole request. You can delete individual days from the schedule planner without deleting the entire Time off request.

Right click Time off request on each individual date and press **Delete** to remove the time off request from the employee schedule.

This will remove the time off request from the schedule and restore the pay codes.

If you want to edit the pay code used or the length of hours in a given day of the Time off request, navigate to the date and right click Time off request on each individual date and press **Edit**.

Screenshots

7/31 - 8/06	
Wed 8/05	Thu 8/06
8:00AM - 4:30PM	8:00AM - 10:00AM Sick Appointments [2.0] 12:00PM - 4:30PM

Refresh View Comments

Bell, Morgan T
8:00AM - 10:00AM (8/06)
1. 8:00AM [2.0]: Regular

- Edit
- Delete**
- Cut
- Copy
- Paste
- Add shift
- Add Pay Code

Refresh View Comments

Bell, Morgan T
8:00AM - 10:00AM (8/06)
1. 8:00AM [2.0]: Regular

- Edit**
- Delete
- Cut
- Copy
- Paste
- Add shift
- Add Pay Code

Edit Pay Code Administrative Leave Paid

Assigned to

Bell, Morgan T

Effective Date:*

8/06/2020

Pay Code:*

Administrative Leave Paid

Amount (HH.hh):*

6.50

 Override Accrual Days: Override Shift Whole Shift Partial Shift

Start Time:*

8:00AM

Repeat for:

 days

Transfer Job:

Transfer Labor Level:

Comments (0) [Add Comment](#)

Cancel

Apply

In this window, supervisors can edit the pay code, amount of hours, start time and more. Once finished editing the Time off request press **Apply** to confirm the changes.

Time Off Reports

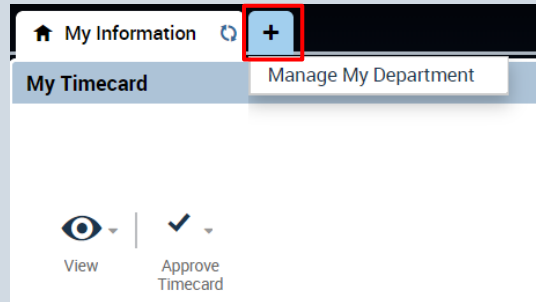
Purpose:

This job aid will help you view time off reports.

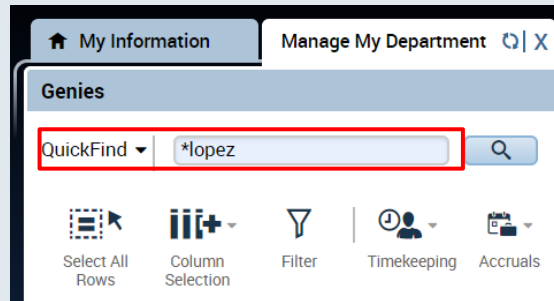
Steps

Screenshots

From the home page, click on the '+' and select Manage my Department

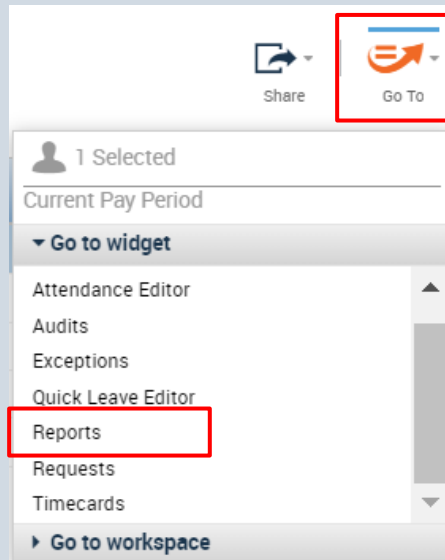


Find the employee you want to view by using the QuickFind window and inserting their name or employee ID.



Click their name once to select them.

Then on the right side of the window, select the Go To drop down menu and choose "Reports"



Steps

View the reports for this employee by using the column to the left to narrow down the available reports. Once a report is selected press **Run Report**.

Screenshots

The screenshot shows a web interface titled 'REPORTS'. At the top, there are two tabs: 'SELECT REPORTS' (active) and 'CHECK REPORT STATUS'. Below the tabs are several buttons: 'Run Report' (highlighted with a red box), 'Refresh', 'Create Favorite', 'Save Favorite', 'Duplicate Favorite', and 'Delete Favorite'. On the left side, there is a tree view of reports. The 'Accruals' section is expanded, and 'Accrual Detail (Data)' is highlighted in green. On the right side, there is a form for 'ACCRUAL DETAIL (DATA)' with fields for 'Description', 'People' (dropdown), 'Time Period' (dropdown), and 'Output Format' (dropdown).

Select the report you want to view and it will highlight green. Once it is selected, press **View Report** and a pdf will be downloaded to your computer for you to open and view.

The screenshot shows a web interface titled 'REPORTS'. At the top, there are two tabs: 'SELECT REPORTS' (active) and 'CHECK REPORT STATUS'. Below the tabs are several buttons: 'View Report' (highlighted with a red box), 'Refresh Status', and 'Delete'. Below the buttons is a search bar with a 'Search' button. Below the search bar is a table with two columns: 'Report Name' and 'Format'. The table contains two rows: 'Attendance Analysis' with format 'pdf' and 'Accrual Detail (Data)' with format 'pdf'. The 'Accrual Detail (Data)' row is highlighted in green.

Report Name	Format
Attendance Analysis	pdf
Accrual Detail (Data)	pdf