Time Off Requests

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

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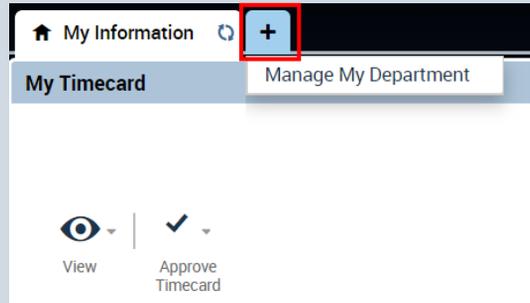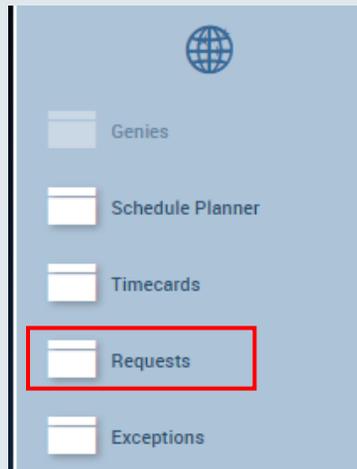
From the Requests tab, you will be able to view all Time off requests made. Select a request by clicking it once, which turns it blue, and then from the icons at the top of the page, you can select how you want to handle it.

Steps	Screenshots

Once you select how you want to handle the request, you will be given this following pop up window. If everything is in order, select Approve, Deny, or Reject.

Make sure that everything is in order with the request before selecting how you want to handle the request.

Approve Time-Off Request

→ Submitted: 7/20/2020 - 1:47:35PM
   Modified by:

Employee: .   Type: Time Off Request Full Day

		Start date	End date	Pay code	Time Unit	Start time	Daily Amount
+	✕	3/15/2021	3/15/2021	Vacation	Hours	7:00AM	2.0

Accruals on: 3/15/2021

Accrual	Balance
50 Sick	22.5 Hour
51 Vacation	20.02 Hour
52 Personal	8.0 Hour

Status History

→ Submitted: 7/20/2020 - 1:47:35PM

Comments (0)
Select Comment
✕ Type a note (optional)

Cancel   Approve

From the Requests tab, you will be able to view all Time off requests that have been submitted, with the new breakdown between full day and partial day requests you will be able to get a clearer picture of who is and is not working.

Subject ▼	Submit Date
Time Off Request Partial Day	3/22/2021 1:22PM
Time Off Request Partial Day	3/22/2021 1:24PM
Time Off Request Full Day	7/20/2020 1:47PM
Time Off Request Full Day	7/20/2020 1:47PM
Time Off Request Full Day	7/20/2020 1:49PM

Create Time Off Requests

Purpose:
This job aid will help you edit and create time off requests.
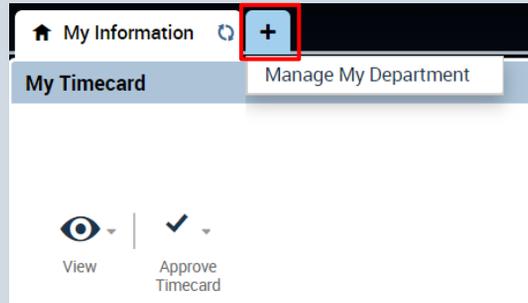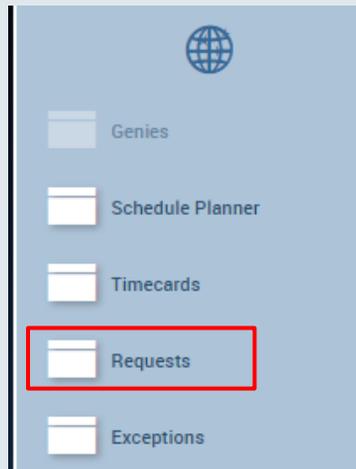
| Steps	Screenshots
From the home page, click on the '+' and select Manage my Department	
Navigate to the Related Items tab on the right side of the screen and go to Requests.	
From the Requests tab, you will be able to view all Time off requests made. Select a request by clicking it once, which turns it blue, and then from the icons at the top of the page you can view Details, make Edits, and Add New Requests.	

Steps	Screenshots
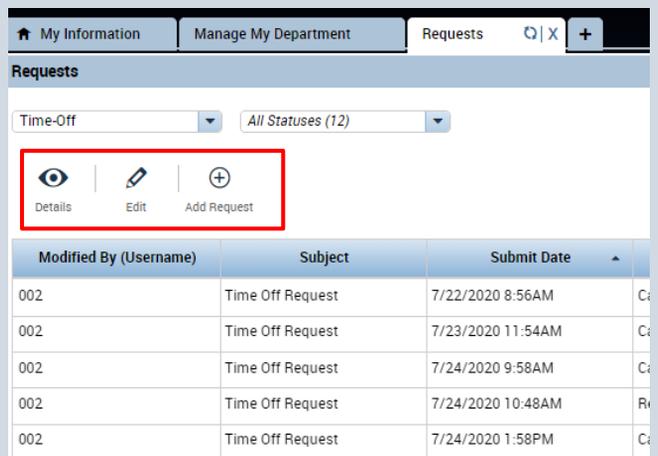
Steps

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
+	✕	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.
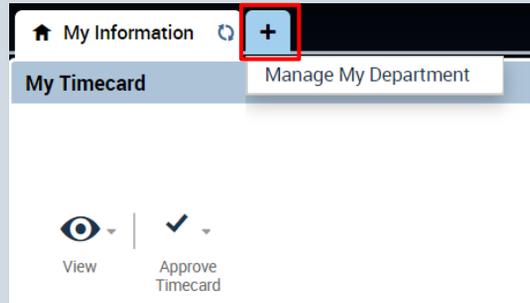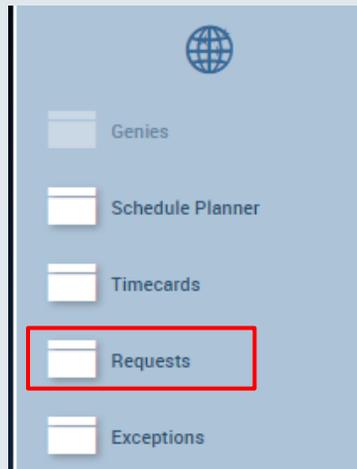
| Steps	Screenshots
From the home page, click on the '+' and select Manage my Department	
Navigate to the Related Items tab on the right side of the screen and go to Requests.	
From the Requests tab, you will be able to view all Time off requests made. Select a request that has the status: approved by 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.	
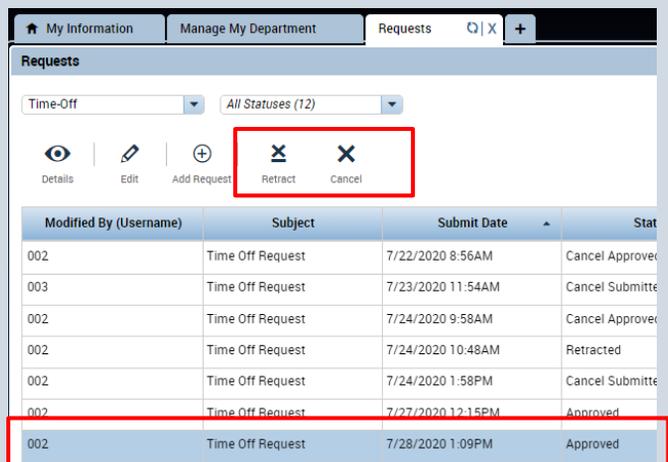
Steps	Screenshots
If you press the Cancel icon, this window will pop up. Press Cancel Request in the bottom right corner. Employees can also cancel their own requests under their My Calendar tab. This will be reviewed at the end of this section.	
The Time off request will change status to Cancel Submitted. 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.	
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.	

Steps	Screenshots
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.	**Retract Time-Off Request** ☑ Approved: 7/27/2020 - 12:16:51PM Modified by: 002 Employee: Bell, Morgan T Type: Time Off Request ▶ Requested ▼ Approved | 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 | Accruals on: 8/06/2020 | Accrual	Balance
Bone Marrow Donor	0.0 Hour
Comp Time	0.0 Hour
Comp Time Expired	0.0 Hour | **Status History** ☑ Approved: 7/27/2020 - 12:16:51PM 002 → Submitted: 7/27/2020 - 12:15:20PM 002 Cancel **Retract**
Once you retract the Time off request, this window will pop up. Press OK to continue.	**Information** ℹ 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. **OK**
In order to manually update the employees schedule, press the Go To widget, then Schedule Planner.	Share **Go To** 👤 1 Selected Current Pay Period ▼ **Go to widget** Schedule Planner Attendance Editor Audits Exceptions

Steps	Screenshots
Navigate to the dates of the Time off request.	**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** 7/31 e 8/04 :30PM 8:00AM - 4:30PM 8:00AM - 10:00AM ✎ 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 ✕ Time Of ✕ Time Off Reque Details Cancel request **8:00AM-4:00PM** 8:00AM-4: [8.00 h] [8.00 h] Regular 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"	
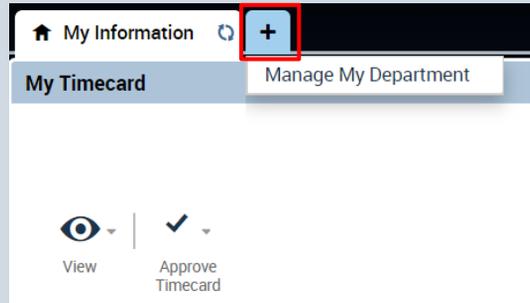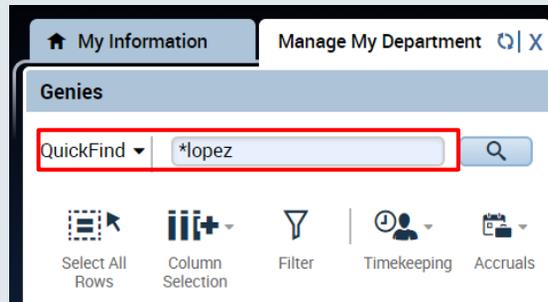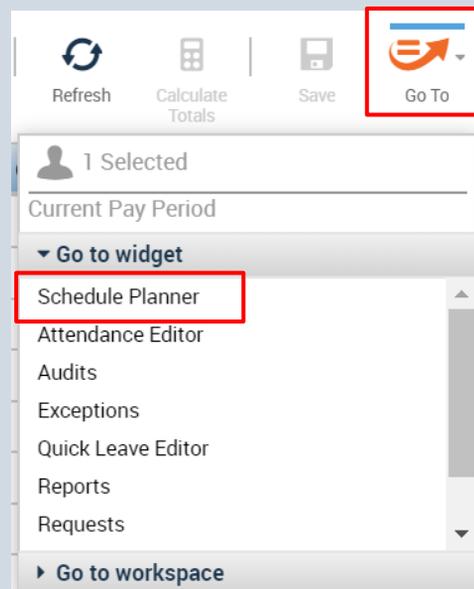
Steps	Screenshots
Navigate to the dates of the Time off request. If you want to edit the Time off request without deleting the whole request. You can delete individual days from the schedule planner without deleting the entire Time off request.	
Right click Time off request on each individual date and 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.	

Steps	Screenshots
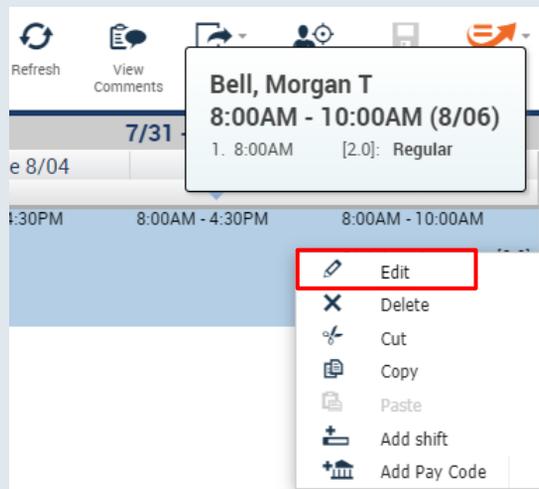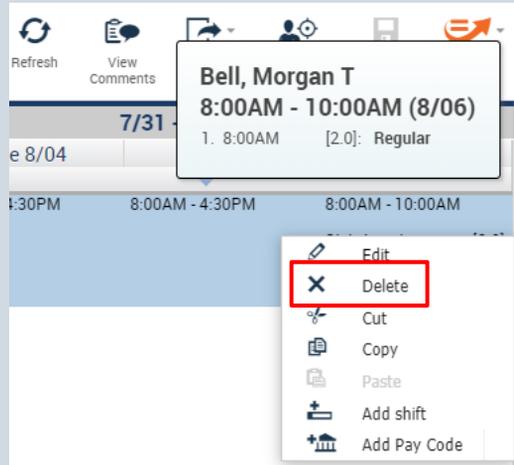
Edit Pay Code Administrative Leave Paid

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: 1 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.
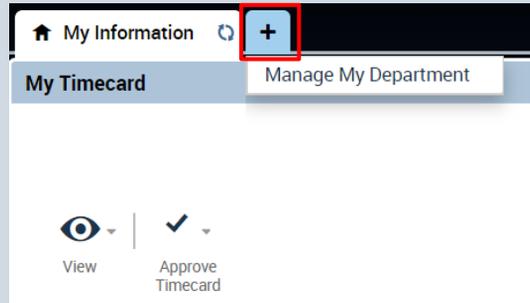
| Steps	Screenshots
From the home page, click on the '+' and select Manage my Department	
Find the employee you want to view by using the QuickFind window and inserting their name or employee ID.	
Click their name once to select them. Then on the right side of the window, select the Go To drop down menu and choose "Reports"	
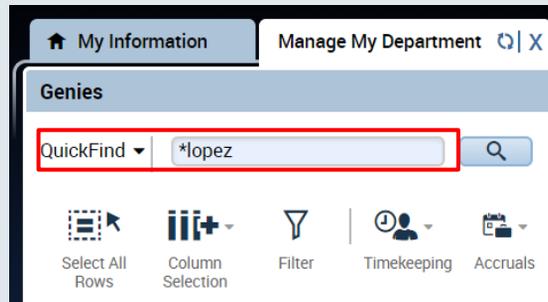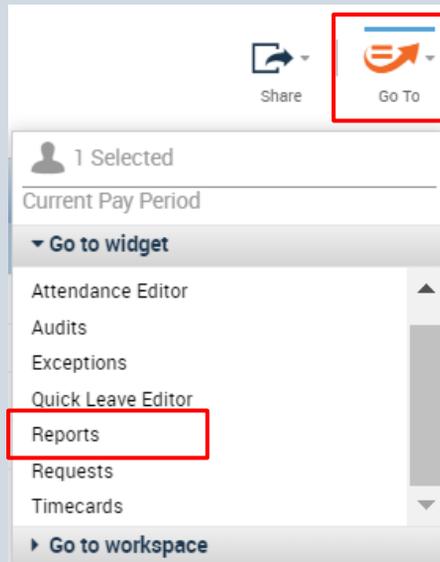
Steps	Screenshots
View the reports for this employee by using the column to the left to narrow down the available reports. Once a report is selected press Run Report.	
Select the report you want to view and it will highlight green. Once it is selected, press View Report and a pdf will be downloaded to your computer for you to open and view.	