

Employee Leave Request Overview

These directions are meant to assist you in using leave requests via the portal.

THE PROCESS:

The electronic process is setup within the HRIS system used by the SU. The system allows for leave plans to be view only or fully functional in the portal. It also allows for plans not to be visible at all.

Driving the earned column are automated tables set up to meet the specifications of a particular segment of the population. If a plan has no automatic entitlement, it will show with zero availability until the central office is directed by an administrator to assign hours to a particular persons plan.

There is an option for special setups. Some examples might include; adding a field trip plan, adding a workers compensation plan or an unpaid leave plan.

If we are asked to accrue or adjust a leave plan, often, the change will not show until the next payroll is processed as leave plan updates are a step included in the payroll process.

The leave request procedure includes an approval as well as posting process. Building administrators decide who is included in the approval process; choices may include staff responsible for getting subs, immediate supervisors, department heads, etc. There is often more than one approver and they receive the request sequentially. There are key personnel in each building that oversee the process and once a request is fully approved they post the entry thus affecting your balance.

ATTENDANCE PAGE

The “attendance” page of the portal is found beneath the employee information category in your employee portal. The attendance page shows you what leave plans you have available as well as the use and balances for each plan.

Tidbits

Take the word “approver” lightly. At times, people involved in the approval process are getting the notification simply for logistics purposes.

“Available leave plans” in this case means available in the portal. There may be plans not visible in the portal.

Take Note

Be sure to enter the total "correct" hours. (some folks work a 7.5 hour day, some 6.5, etc.)

Leave use must fall within governing document criteria. Leave found to be outside of those parameters may be rescinded.

Compliance with the FMLA/VPLL may prompt a request for further information for time requested of a certain duration and/or serious health issue.

Plan Summary

Leave Plan	Beg.	Earned	Used	Adj.	Avail.	Pending Approval	Future Scheduled	Time Units
Bereavement - All Staff	0.0000	40.0000	0.0000	0.0000	40.0000	0.0000	0.0000	Hours
Personal Leave - (4X8)	0.0000	32.0000	30.2500	0.0000	1.7500	0.0000	0.0000	Hours
Sick Leave - Central Office Staff	120.0000	120.0000	5.0000	0.0000	235.0000	7.0000	0.0000	Hours
Vacation - Fiscal Support Staff	20.0000	80.0000	20.0000	0.0000	80.0000	0.0000	0.0000	Hours
Comp Time	0.0000	29.7500	3.5000	0.0000	26.2500	0.0000	0.0000	Hours
Floating Holidays	0.0000	25.7500	0.0000	0.0000	25.7500	0.0000	0.0000	Hours

Absence Requests

Pending Absence Requests
Denied Absence Requests

Pending Absence Requests

Make sure the hours you enter are correct for your position!

Use this to export to excel.

Tips and Reminders can be found in this right hand call-out box

Columns:

Beg. – The beginning balance, most often rolled from the previous year.

Earned – The current year’s entitlement.


Used – The approved requests posted against your balance to date.

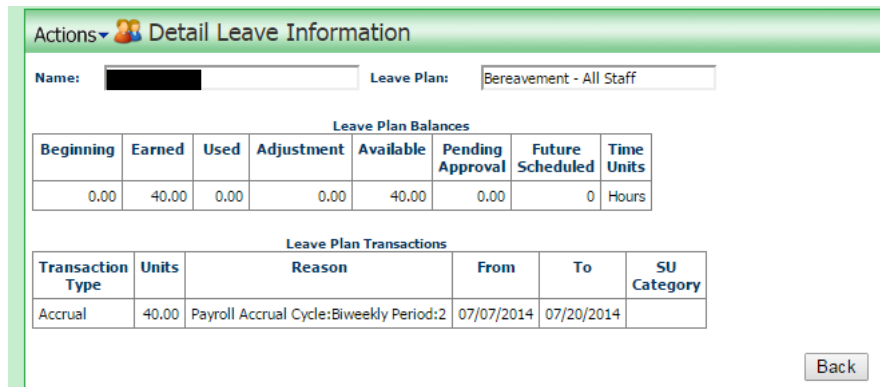
Adj. – Adjustments entered to correct an error, comply with employment guidelines, etc.

Avail. – The available hours once the “used” and “adj” have been calculated against your “beginning” and “earned” balances.

Pending Approval – Requests that have been made but not posted against your balances.

Magnifying Glasses:

 If you wish to view the details of what contributed to your plans balances, double click the magnifying glass in front of the plan. Once you are done reviewing the detail screen, use the “back” button to close it.



Leave Plan Balances							
Beginning	Earned	Used	Adjustment	Available	Pending Approval	Future Scheduled	Time Units
0.00	40.00	0.00	0.00	40.00	0.00	0	Hours

Leave Plan Transactions					
Transaction Type	Units	Reason	From	To	SU Category
Accrual	40.00	Payroll Accrual Cycle:Biweekly Period:2	07/07/2014	07/20/2014	

Calendar Icon:



In the lower right hand corner of the attendance screen you will see this small calendar. Double click this icon to see your leaves in calendar view. Use the “close” button to leave this screen, not your browsers back arrow.

Second Grid: Absence Requests

Absence Requests
Pending Absence Requests
Denied Absence Requests

A second screen on the attendance page lists your un-posted requests in list form. If you double click one of the titles here the grid will populate with anything pending or denied.

Making a request:

Add Request


Modify a Request

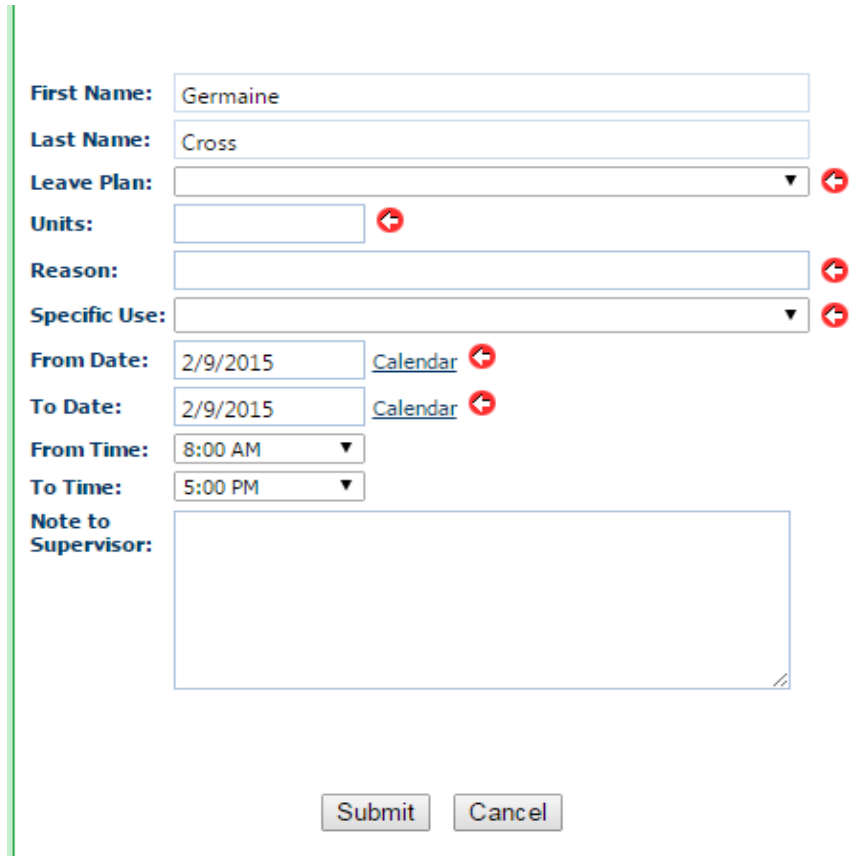
Cancel a Request

The buttons listed will open another window. Depending upon your choice here you can Add, Modify, or Cancel a request.

Adding a Request

Give yourself and your supervisor the necessary information:

 Denotes a mandatory field.



Tidbits

Bereavement: Due to negotiated agreement language, listing the decedent and their relationship to you will deter delaying approval and follow up questions.

Last minute Needs:

There are instances when time does not allow use of the portal and you must call instead. You must still enter your request via the portal ASAP after you make the call.

Leave Plan: The leave plan box is a dropdown, click the arrow at the end of the box to make a selection.

Units: Units are usually hours. Keep in mind what YOUR positions work day is.

Reason: You may simply reiterate, for example “sick” or “personal”. However, it is extremely handy to put a small memory jogger in there.

Specific Use: If required, the specific use box may contain “family” in the case of sick leave. It also may contain “FMLA” in a case where your leave is a qualifying event. Otherwise, use “regular”.

From and To Dates: PLEASE NOTE – If your leave request jumps a weekend or day you are not scheduled, please break your requests into multiple entries. For example; if you are requesting Thursday through Tuesday, enter Thursday and Friday together then Monday and Tuesday together in a separate entry.

From and To Time: Especially important for partial day requests.

Note to Supervisor: Very handy for things like requesting a particular sub, explaining that you may not take the time if..., etc.

Once your entries are complete click "Submit". Your entry will go to the first person slated to receive your requests.

The screenshot shows an 'Absence' form with the following fields and values:

- First Name:** Germaine
- Last Name:** Cross
- Leave Plan:** Personal Leave - (4X8)
- Units:** 4 Hour(s)
- Reason:** neighbors funeral
- Specific Use:** Regular
- From Date:** 2/9/2015
- To Date:** 2/9/2015
- From Time:** 12:00 PM
- To Time:** 4:00 PM
- Note to Supervisor:** TEST

At the bottom of the form, it displays:

- Submitted on:** 2/6/2015 12:26 PM
- Submitted to:** Gagner, Martha A

A 'Done' button is located below the submission information. A callout box points to the 'Submitted to' field with the text: "I do have more than one approver but Martha is the first to receive my request and the only one I will see." Another callout box points to the 'Reason' field with the text: "Balancing privacy, of course, I find this field extremely helpful." A third callout box points to the 'Submitted on' and 'Submitted to' fields with the text: "Once you receive this message, click 'done'".


Tidbits


Read the feedback if your request is denied. Sometimes it is only that a correction is needed.






Please note that emails concerning your leave are often system driven and contain the directive "do not reply."

You will not be notified as your request moves through the approvers assigned to it. You will however, receive an email when the leave is fully approved or denied.

Running into a problem?

 **Absence**

 **Warning: Request exceeds allowable leave limit.**

First Name:
Last Name:
Leave Plan: 
Units: **Hour(s)** 
Reason: 
Specific Use:
From Date: [Calendar](#) 
To Date: [Calendar](#) 
From Time:
To Time:
Note to Supervisor:


If she leaves tuesday I'll be in Wed.

If you see this message it means you have exceeded the available hours for use within this plans limits.
Go back and check your leave plans availability.

Contact your buildings designated personnel if you feel the warning is in error.

Modify / Cancel a Request

You may change or cancel a request. New requests will not be available for you to amend until they make it through the approval process. This should happen within 24 hours. As you see below, the list of requests will include those posted as well as pending (approved but un-posted).

 **Employee Leave Request Modify**

Leave Plan	Reason	Units	From	To	Status	
Sick Leave - Central Office Staff	headache	1.25	01/19/2015	01/19/2015	Pending	<input type="button" value="Modify"/>
Vacation - Fiscal Support Staff	left early-family emergency	1.5	01/20/2015	01/20/2015	Pending	<input type="button" value="Modify"/>
Vacation - Fiscal Support Staff	personal business	2	01/21/2015	01/21/2015	Used	<input type="button" value="Modify"/>

When you modify a request **NEVER** enter a negative number.

The system will handle the new entry by reversing the initial request and entering the new one. Both the retraction and the new request will be sent through the approval chain thus informing every one of the intended change.

After clicking the modify or cancel button, this detail screen will open and you can amend only certain fields.

The screenshot shows the 'Absence' form with the following fields and values:

- First Name:** Germaine
- Last Name:** Cross
- Leave Plan:** Sick Leave - Central Office Staff
- Units:** 1.5
- Reason:** headache
- Specific Use:** Regular
- From Date:** 1/19/2015
- To Date:** 1/19/2015
- From Time:** 8:00 AM
- To Time:** 9:15 AM
- Note to Supervisor:** miscalculated - TEST

Submitted on: 2/6/2015 12:46 PM
Submitted to: Gagner, Martha A

Buttons: Done

Callouts:

- A note of explanation is really necessary in the case of a modification. (points to the Note to Supervisor field)
- Always click done before leaving this screen. (points to the Done button)

Tidbits

Again, just put the new units in, do not put in negative hours in an attempt to offset the original request.

If you are attempting to cancel, the “modify” buttons would say “cancel”. The same “Absence” screen would appear with less amenable fields.

Leave requests must still be entered even after the fact. Often, we must call in a last minute absence when time is not sufficient to use the portal. We must still follow up with the portal entry. **Make these entries in a timely manner.**

Notes of interest:

An “approver” can send a request back to either the previous approver or the requester if they feel information is missing. (rather than deny the request)

While a request is making its way through the process, the “attendance clerk” in your building can always see the request and know where it is in the process.

Like the attendance clerk in your building, your payroll and benefits coordinators can view the process.