Managing My Employees' Time-Off Requests

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Managing your employees' paid time off is a breeze with our Time-Off Requests solution. Through Time Off-Requests, you can easily track your employees' accruals, approve or deny time-off requests and even submit requests for your employees. Best of all, the feature takes into account your employees' projected future time off. So if they would like to submit a request for six months in the future, Time-Off Requests will automatically take into account their projected accruals. In this training course, we'll discuss how to:

- view your employees' accruals (Page 3);

- individually approve or deny time-off requests (Page 5);

- batch approve or deny time-off requests (Page 8);

- submit paid time-off requests for employees (Page 9);

- utilize the Employee Self-Service Time-Off Calendar (Page 13); and

- delete time-off requests (Page 14).

Viewing Employee Accruals

When it comes to managing your employees' time-off requests, one of the first things you need to know is where you can go to view accrual information. Let's say that you need to see how much paid time off an employee has earned. You can easily do this through their Form 6: Accrual Information.

To get started, let's go to the "Make Employee Changes" screen, where employee information is stored.

From here, simply click on the employee you'd like to view.

From their Employee Menu, select "Form 6: Accrual Information."

Here, you can see all of the employee's accrual information, including when they started earning hours, when they can redeem them and when their accruals will reset. If you want to see how much time the employee has to use, check out the "Available" section under any of the accrual categories.

Individually Approving or Denying Time-Off Requests

Whenever an employee submits a time-off request, depending on your settings, you will receive an email notification, as well as a reminder in your Notifications Center. You can take action on the request directly through the Notification Center or through the Time-Off Calendar, which we'll check out today.

First, we'll need to access the Time-Off feature, which we can do through the Time Management tab.
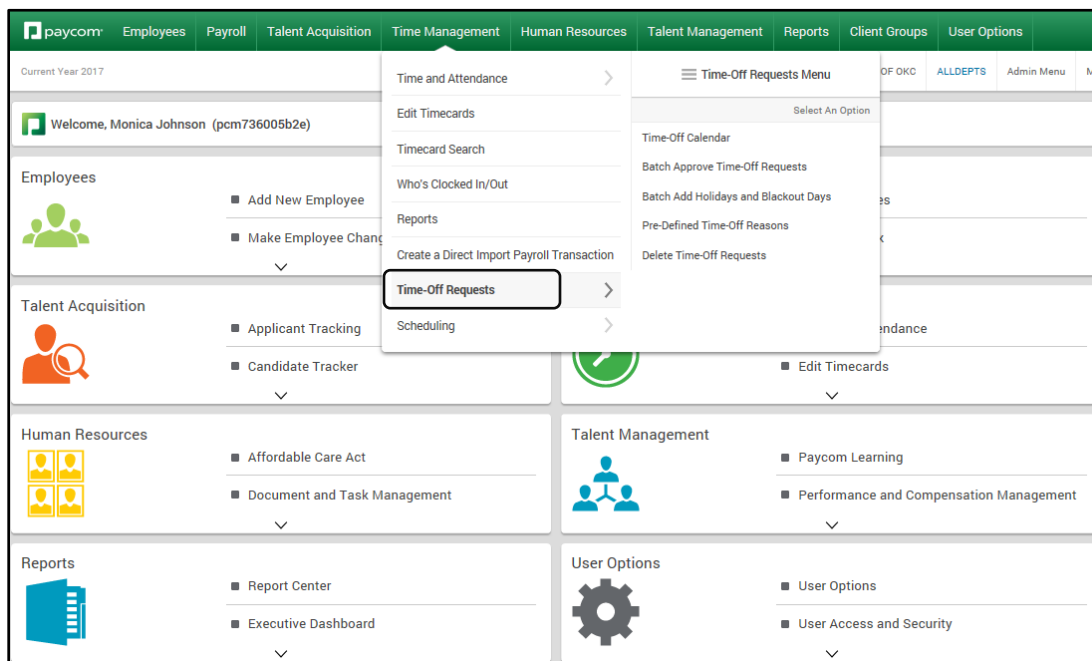
From here, you'll see the options available, including the Time-Off Calendar and the Time-Off Calendar for All Departments, if you have access to it. Here's the difference between the two – you can use the All Departments calendar to see all of the time-off requests within your company, but you can't take any action on them because the calendar is read-only. So to approve, deny or edit any requests, you'll need to go to the "Time-Off Calendar."

Here, by default, you can see all of the requested, approved, denied and deleted time-off requests for the month.

However, you can filter the calendar by department, employee status, employee and time-off status. So, for example, if you only want to see pending and approved time-off requests, you would select "Approved & Requested" from the Time-Off Status drop-down.

When you're finished, click "Filter."

The calendar then displays according to your selection. You can view a request details by directly clicking on it.

After doing so, the request appears on the right-hand side of the screen. Here, you can approve, deny, delete or edit the request. After you've approved or denied the request, the employee will be immediately notified through their Employee Self-Service.

Batch Approving or Denying Time-Off Requests

We've shown you how to approve or deny an individual request from the Time-Off Calendar, but what if you have several employees requesting time off and you want to approve them all at once? You can accomplish this through "Batch Approve Time-Off Requests." This is especially helpful during times of the year multiple employees request off, like before or after a holiday.
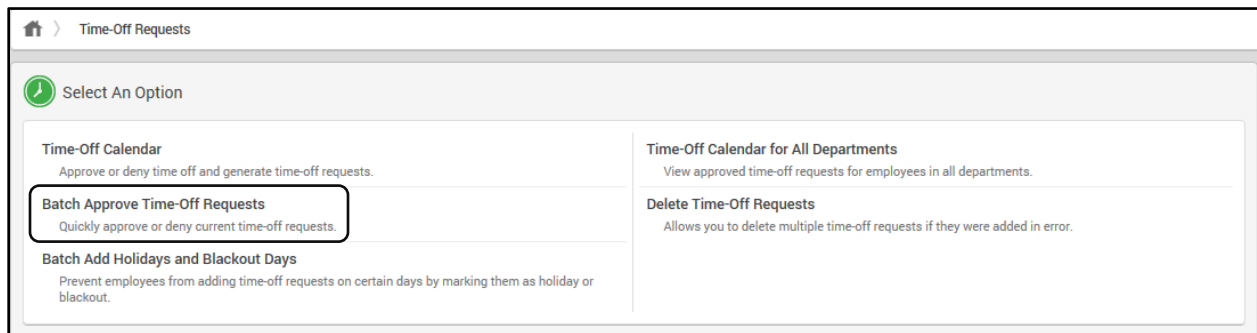
Any pending time-off requests from your employees display automatically. By viewing the columns here, you can view several key pieces of information including, who submitted a request, when they submitted it, what type of time they're requesting off, how much they're requesting off, how much time they have available, and the reason they are requesting it. So, for example, you can take a look at the Future Hours Approved column to see future accruals that you've already approved time-off requests for; while you can use the Future Hours Pending column to see future accruals that employees have requested to use but you've yet to approve.

To batch approve or deny requests, select the names of the employees and choose either "Batch Approve" or "Batch Deny" from the Actions drop-down.

No matter what option you selected, you'll be able to enter a comment for the employee(s) to view before finalizing the request. Though we're approving the requests in our example, this might be useful if you need to notify an employee as to why you're denying their request. Also, keep in mind that if you have our Scheduling feature and approved a time-off request, the employee will display as unavailable to work during that time. When you're finished, depending on whether or not you decided to approve or deny the time, click "Approve All" or "Deny All."

Submitting Paid Time-Off Requests for Employees

Occasionally, there may be times when you'll need to submit a time-off request for an employee. This is especially useful if you have someone who is missing work because of unforeseen circumstances. When this happens, you can easily add the request from the Time-Off Calendar. Let's jump back into the calendar to see how to do this.

Now that we're here, do you see the arrow on the right side of the Add Time-Off Request tab? That's what you'll want to click on in order to add a request.

After doing so, a new section will display, where you can add the request. First, select who you want to add the request for from the Employee drop-down.

Next, you'll want to enter the day(s) for the request. If the request extends over a weekend, you can use the "Ignore Weekends" option to remove the unnecessary time off. Then, enter the number of hours the time off request is for, and select when the hours should begin from the Start Time drop-downs. So, for example, if you want to add a time-off request for eight hours on a single day, you'd enter the same dates in the Day(s) text fields, key in "8.00" in the Hours per Day text field, and set the Start Time to "08:00," assuming you'd like the time to begin at 8 a.m. and last until 5 p.m.

After that, you'll need to choose the accrual type, whether Paid Time Off, Sick or Vacation, etc. Depending on what you have set up, you can also either enter a comment or select it from the drop-down. This can serve as a reminder as to why you're submitting the request. When you're finished, click "Add Request."

Since you added the request for the employee, it will automatically be approved.

Employee Self-Service Time-Off Calendar

Empower your employees' by letting them review each other's time-off requests. Through the Time-Off Calendar, an employee can consider how many co-workers are already off before entering a request of their own.

When the employee goes to request time-off, they will see the same calendar with a new filter option. From here, they can select to view their own requests, other's requests or all requests.

Enable access to this optional feature in your Employee Self-Service Access Profile. Use the gear icon to further define your settings such as what employees should be able to see.

You can group the time-off requests by labor allocation, pay class, position or schedule group. Then, select if employees should be able to see either approved, requested or both statuses. Lastly, choose to show or mask the employee information so they can see who made the request.

Deleting Time-Off Requests

Though you can deny time-off requests through the Time-Off Calendar, you can also do this from the Delete Time-Off Requests screen. This option is useful if you need to delete multiple time-off requests that were added in error to an employee.

To use this tool, you'll need to first select the employee's name from the drop-down, and then choose the accrual type and enter the dates of the request. When you're finished, click "Display Time-Off Requests."

The time-off requests will then display in the field below, where you can select them and then click "Delete."

In Conclusion

Now you know how to view your employees' accruals, as well as how to approve or deny time-off requests, submit PTO requests on behalf of your employees and delete unnecessary requests. To earn complete your certification, don't forget to take the quiz after watching the training video.