

*Managing My Employees' Time-Off Requests*



**PAYCOM**  
UNIVERSITY





## *Managing My Employees' Time-Off Requests*

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.

The screenshot shows the Paycom dashboard with a navigation bar at the top containing: Employees, Payroll, Talent Acquisition, Time Management, Human Resources, Talent Management, Reports, and User Options. Below the navigation bar, there is a welcome message for MONICA JOHNSON. The main area is divided into several sections, each with a list of actions:

- Employees:** Add New Employee, Make Employee Changes (highlighted with a red box).
- Payroll:** Pay Employees, Manual Check.
- Talent Acquisition:** Applicant Tracking, Candidate Tracker.
- Time Management:** Time and Attendance, Edit Timecards.
- Human Resources:** Affordable Care Act, Document and Task Management.
- Talent Management:** Paycom Learning, Performance and Compensation Management.
- Reports:** Report Center, Executive Dashboard.
- User Options:** User Options, User Access and Security.

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

The screenshot shows the "Make Employee Changes" screen. It includes a search filter section and a table of employee matches. The table has the following columns: Batch Edit, Employee, Status, Position Seat, Home Department, Pay Class, Terminal, Schedule Group, Badge Number, and Employee Self-Service Login. The first row in the table is highlighted with a red box.

Batch Edit	Employee	Status	Position Seat	Home Department	Pay Class	Terminal	Schedule Group	Badge Number	Employee Self-Service Login
<input type="checkbox"/>	ADAMS, FRANK (A016)	A	Executive Sales Representative (AAAAW)	800	PCO	TGO			05683A016
<input type="checkbox"/>	ADAMS, GEORGE (L999)	A		200					05683L999
<input type="checkbox"/>	ADAMS, NEAL N. (DYLA)	A	Sales Manager (AAAAA)	200			7116-Wait Staff	56789	05683DYLA
<input type="checkbox"/>	ALLEN, AMBER (ALLE)	A		900			7806-Regular		05683ALLE
<input type="checkbox"/>	ALLEN, KARA (A036)	A	Vice President of Operations (AAAAB)	200	PCO		7116-Wait Staff		05683A036



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

Employee Menu	
1	Demographics, Pay Rates and Taxes
2	Scheduled Earnings and Deductions
3	Dates and HR
4	Percentage Labor Distribution
5	3rd Party Payees
6	<b>Accrual Information</b>
7	Employee Photo
8	Custom Fields
9	Employee Self-Service
10	Time and Attendance <span>View Timecard</span>
11	Direct Deposit
12	Year-to-Date Totals
13	Employee Benefits
14	Dependents and Beneficiaries
15	My Documents
16	To-Do List(s)
17	Year-End Tax Forms
20	Compensation and Performance History
21	Learning

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.

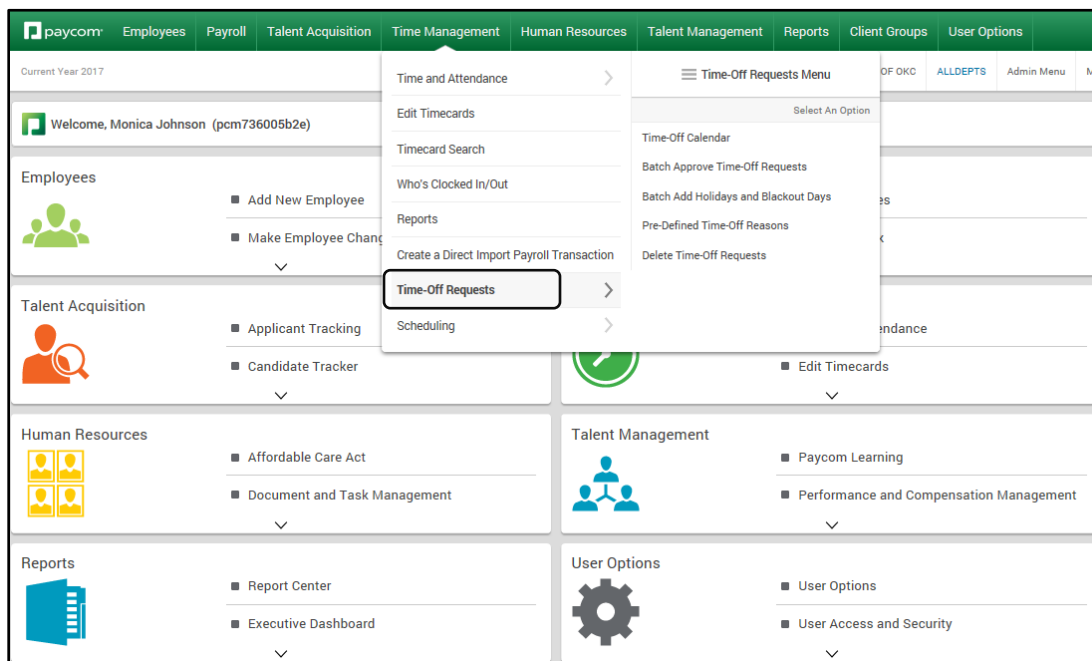
Form 6 - Accrual Information						
<span>Hide/Show Accruals</span>						<span>View Change History</span>
<b>Paid Time Off (Accrue Per Hour)</b> <span>Make Changes</span>						
Accrual Information	Accrual Policy	Is Accrual Active for Employee?	Hidden Online from Employee	Hidden from Employee Checks	Years of Service	Are Increments Required
	3 - PTO	Yes	No	Yes	3	No
<b>Accrual Dates</b>		<b>Accrual Added</b>	<b>Hire Date</b>	<b>Accrual Date</b>	<b>Next Reset</b>	<b>Next Anniversary</b>
		10/12/2016	06/16/2013	06/10/2013	06/10/2017	06/16/2017
<b>New Hire Dates</b>		<b>Award Start</b>	<b>Redeem</b>	<b>Show Online</b>	<b>Show on Checks</b>	
		06/10/2013	06/10/2013	06/10/2013	06/10/2013	
<b>Accrual Amounts</b>		<b>Pay-Period Accrual Rate</b>	<b>Beginning Balances</b>	<b>Awarded Amount</b>	<b>Taken Amount</b>	<b>Available</b>
		0.011338	0.00	8.00	0.00	8.00
<b>Accrual Limits</b>		<b>Period Limit</b>	<b>Year-to-Date</b>	<b>Life-to-Date</b>	<b>Roll Over Amount</b>	
		0.92	24.00	120.00	16.00	
<b>Sick (Accrue Per Hour)</b> <span>Make Changes</span>						
Accrual Information	Accrual Policy	Is Accrual Active for Employee?	Hidden Online from Employee	Hidden from Employee Checks	Years of Service	Are Increments Required
	2 - Sick	Yes	No	Yes	3	No
<b>Accrual Dates</b>		<b>Accrual Added</b>	<b>Hire Date</b>	<b>Accrual Date</b>	<b>Next Reset</b>	<b>Next Anniversary</b>
		10/12/2016	06/16/2013	06/10/2013	06/10/2017	06/16/2017
<b>New Hire Dates</b>		<b>Award Start</b>	<b>Redeem</b>	<b>Show Online</b>	<b>Show on Checks</b>	
		06/10/2013	06/10/2013	06/10/2013	06/10/2013	
<b>Accrual Amounts</b>		<b>Pay-Period Accrual Rate</b>	<b>Beginning Balances</b>	<b>Awarded Amount</b>	<b>Taken Amount</b>	<b>Available</b>
		0.019231	0.00	1.54	0.00	1.54
<b>Accrual Limits</b>		<b>Period Limit</b>	<b>Year-to-Date</b>	<b>Life-to-Date</b>	<b>Roll Over Amount</b>	
		1.54	40.00	120.00	40.00	
<b>Vacation (Accrue Per Hour)</b> <span>Make Changes</span>						
Accrual Information	Accrual Policy	Is Accrual Active for Employee?	Hidden Online from Employee	Hidden from Employee Checks	Years of Service	Are Increments Required
	1 - Vac	Yes	No	Yes	3	No
<b>Accrual Dates</b>		<b>Accrual Added</b>	<b>Hire Date</b>	<b>Accrual Date</b>	<b>Next Reset</b>	<b>Next Anniversary</b>
		10/12/2016	06/16/2013	06/10/2013	06/10/2017	06/16/2017
<b>New Hire Dates</b>		<b>Award Start</b>	<b>Redeem</b>	<b>Show Online</b>	<b>Show on Checks</b>	
		06/10/2013	06/10/2013	06/10/2013	06/10/2013	
<b>Accrual Amounts</b>		<b>Pay-Period Accrual Rate</b>	<b>Beginning Balances</b>	<b>Awarded Amount</b>	<b>Taken Amount</b>	<b>Available</b>
		0.038462	0.00	4.62	0.00	4.62
<b>Accrual Limits</b>		<b>Period Limit</b>	<b>Year-to-Date</b>	<b>Life-to-Date</b>	<b>Roll Over Amount</b>	
		3.00	80.00	160.00	40.00	



## 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."

Time-Off Requests

Select An Option

- Time-Off Calendar**  
Approve or deny time off and generate time-off requests.
- Batch Approve Time-Off Requests**  
Quickly approve or deny current time-off requests.
- Batch Add Holidays and Blackout Days**  
Prevent employees from adding time-off requests on certain days by marking them as holiday or blackout.
- Time-Off Calendar for All Departments**  
View approved time-off requests for employees in all departments.
- Delete Time-Off Requests**  
Allows you to delete multiple time-off requests if they were added in error.

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

Time-Off Requests > Time-Off Calendar

Filters

Department: All Employee: All Employee Status: All Time-Off Status: All

Show Advanced Filters Filter Send Reminders

February 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	5 req	5 req	2 req	18
19	20	21	1 req	1 req	1 req	25
26	27	28	25 Blackout	1	2	3
5	6	7	8	9	10	11

February 1 2017

Requests

ADAMS, FRANK

Vacation 8.00 hours

Beginning at 08:00

Current Available 93.00

Future Hours Approved 0.00 Edit

Future Hours Pending 0.00

Net Available 93.00

Projected Net Available 93.00 hours (0 future hours)

Current Status Removed



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.

Time-Off Requests > Time-Off Calendar

Filters

Department: All Employee: All

Employee Status: All Time-Off Status: All

Show Advanced Filters Filter Send Reminders

- All
- Requested
- Approved
- Approved & Requested
- Deleted
- Denied
- Calendar Only

When you're finished, click "Filter."

Time-Off Requests > Time-Off Calendar

Filters

Department: All Employee: All

Employee Status: All Time-Off Status: Approved & Requested

Show Advanced Filters Filter Send Reminders



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

The screenshot shows the 'Time-Off Calendar' interface. On the left, there are filters for Department (All), Employee (All), Employee Status (All), and Time-Off Status (Approved & Requested). Below the filters are buttons for 'Show Advanced Filters', 'Filter', and 'Send Reminders'. The main area displays a calendar for February 2017. A request is highlighted on Friday, February 17th, with a yellow background and a green box containing '1 req'. To the right of the calendar, there are dropdown menus for 'Add Time-Off Request' and 'Add Blackout/Holiday Request', and a date selector for 'February 1 2017'.

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.

The screenshot shows the 'Time-Off Calendar' interface with the details of a request for ADAMS, FRANK. The calendar on the left shows the request highlighted on Friday, February 17th. The right-hand side of the screen displays the request details, including the employee's name, request type, and status. The details are as follows:

Requested	Value
Paid Time Off	8.00 hours
Beginning at	08:00
Current Available	8.00
Future Hours Approved	0.00
Future Hours Pending	8.00
Net Available	0.00
Projected Net Available	0.92 hours (0 future hours)
Current Status	Requested

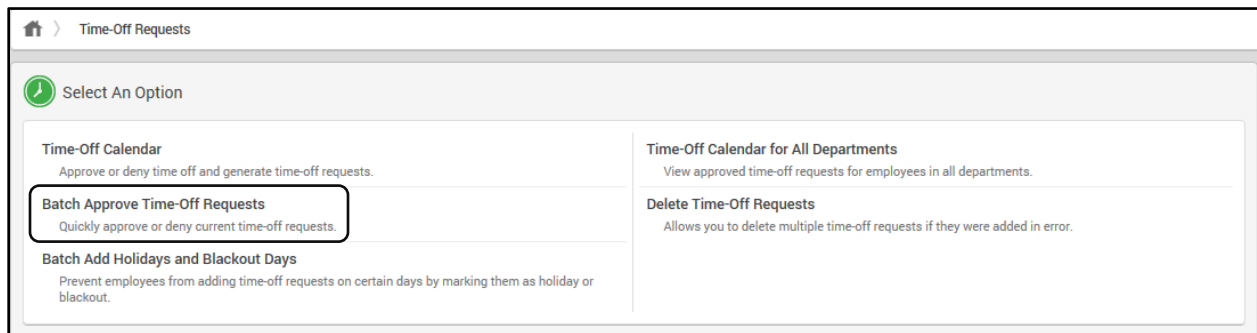
On the right side of the details panel, there are buttons for 'Approve / Deny', 'Delete', and 'Edit'.





## 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.

Time-Off Requests > Batch Approve Time-Off Requests

Filters

Search or Make Selection [gear icon] Search or Make Selection is equal to Value Search (0)

Filter Date Range: 00/00/0000 to 00/00/0000 Clear Search

Batch Approve Time-Off Requests

Search 2 records selected

Select All	Employee	Date and Time	Department	Time Added	Time-Off Type	Hours Requested	Hours Available	Future Hours Approved	Future Hours Pending	Net Available	Projected Net Available	Reason	Approve	Deny	Last Reminder	Dominate
<input checked="" type="checkbox"/>	ADAMS, FRANK (A016)	02/15/2017 16:00	Executive Management	02/15/2017 12:27:10	Sick	1.00	1.54	0.00	1.00	0.54	0.54 hours (0 future hours)		Approve	Deny	Never	
<input type="checkbox"/>	ALLEN, AMBER (ALLE)	02/15/2017 08:00	Marketing	02/15/2017 14:42:55	Vacation	8.00	25.00	0.00	8.00	17.00	17.00 hours (0 future hours)		Approve	Deny	Never	
<input checked="" type="checkbox"/>	ANDREWS, JOHN (ANDR)	02/16/2017 15:00	Executive Management	02/15/2017 14:45:34	Sick	2.00	30.00	0.00	2.00	28.00	28.00 hours (0 future hours)		Approve	Deny	Never	

Actions dropdown menu:

- Batch Approve
- Batch Deny
- Batch Send Reminder

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.”

Time-Off Requests > Batch Approve Time-Off Requests > Approve All

Batch Approve Time-Off Requests

Employee	Date and Time	Time-Off Type	Hours Requested	Hours Available	Future Hours Approved	Future Hours Pending	Net Available	Projected Net Available
ANDREWS, JOHN (ANDR)	02/16/2017 08:00	Sick	2.00	30.00	0.00	2.00	28.00	28.00
Comments								
ADAMS, FRANK (A016)	02/15/2017 16:00	Sick	1.00	1.54	0.00	1.00	0.54	0.54
Comments								

Cancel Approve 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.

**Time-Off Calendar**  
Approve or deny time off and generate time-off requests.

**Batch Approve Time-Off Requests**  
Quickly approve or deny current time-off requests.

**Batch Add Holidays and Blackout Days**  
Prevent employees from adding time-off requests on certain days by marking them as holiday or blackout.

**Time-Off Calendar for All Departments**  
View approved time-off requests for employees in all departments.

**Delete Time-Off Requests**  
Allows you to delete multiple time-off requests if they were added in error.

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.

Filters

Department: All Employee: All

Employee Status: All Time-Off Status: Approved & Requested

Show Advanced Filters Filter Send Reminders

February 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17 (1 req)	18
19	20	21	22	23	24	25
26	27 (25 blackout)	28	1	2	3	4
5	6	7	8	9	10	11

Add Time-Off Request

Add Blackout/Holiday 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.

Add Time-Off Request

\* Indicates Required Field

Employee

Day(s)

Start Time

\* Type

Comments

ADAMS, FRANK (A016)

ADAMS, GEORGE (L999)

ADAMS, NEAL (DYLA)

ALLEN, AMBER (ALLE)

ALLEN, KARA (A036)

ANDREWS, DANIELLE (DAND)

ANDREWS, JOHN (ANDR)

ANDREWS, MELISSA (A009)

ANTHONY, MEGAN (MEGA)

BANKS, RACHEL (RBAN)

BLACK, TIFFANY (A001)

CALHOUN, MICHELLE (A023)

COFTMAN, WILLIAM (A052)

8.00

Add Blackout/Holiday

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."

Add Time-Off Request

\* Indicates Required Field

Employee

Day(s)

Start Time

\* Hours per Day

\* Type

Ignore Weekends

Projected Net Available

Comments

ADAMS, FRANK (A016)

02/16/2017 TO 02/16/2017

08:00

8.00

Paid Time Off

8.00 hours (8 future hours)

Add Request



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

The screenshot shows the 'Time-Off Calendar' interface. On the left is a calendar for February 2017 with a '25 blackout' on Monday, Feb 28. On the right is a detailed view for February 16, 2017, showing a request for ADAMS, FRANK. The request is for 8.00 hours of Paid Time Off, beginning at 08:00. The status is 'Approved'. The summary table shows: Current Available: 8.00, Future Hours Approved: 8.00, Future Hours Pending: 8.00, Net Available: -8.00, Projected Net Available: 0.00 hours (8 future hours), and Current Status: Approved. Action buttons include 'Approve / Deny', 'Delete', and 'Edit'.

## 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.

The screenshot shows the 'Employee Self-Service Time-Off Calendar' for September 2017. The calendar displays dates from 3 to 30. A filter dropdown menu is open, showing options: 'My Requests', 'Other's Requests', and 'All Requests'. The calendar shows '1 Time Off Events' on several days (4, 5, 6, 7, 8) and '8.00 BD2' (Blackout Day 2) on days 11, 12, 13, 14, and 15. Checkmarks are visible on days 12, 13, 14, and 15, indicating requests have been made.



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.

Time-Off Requests

Time-Off Requests  Enable Time-Off Request Threshold

Enable Time-off Request/Schedule Confirmation  Enable Global Time-Off Calendar

Employees can request off  Years  in advance.

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.

### Set Visibility Settings

**Group Time-Off Requests By**

**Select Which Statuses to Display**

**Employee Information**  Show  Mask

## 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.

Time-Off Requests

Select An Option

<b>Time-Off Calendar</b> Approve or deny time off and generate time-off requests.	<b>Time-Off Calendar for All Departments</b> View approved time-off requests for employees in all departments.
<b>Batch Approve Time-Off Requests</b> Quickly approve or deny current time-off requests.	<b>Delete Time-Off Requests</b> Allows you to delete multiple time-off requests if they were added in error.
<b>Batch Add Holidays and Blackout Days</b> Prevent employees from adding time-off requests on certain days by marking them as holiday or blackout.	



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."

Time-Off Requests > Delete Time-Off Requests

Select Time-Off Requests

Employee: ALLEN, AMBER

Accrual Earning: Vacation, 02/15/2017 - 02/16/2017

Display Time-Off Requests

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

Time-Off Requests > Delete Time-Off Requests

Select Time-Off Requests

Employee: ALLEN, AMBER

Accrual Earning: Vacation, 02/15/2017 - 02/16/2017

Display Time-Off Requests

\* Total 2 requests

Delete

Time-Off Requests

Select All	Employee	Request Date	Accrual Type	Accrual Hours	Current Status
<input checked="" type="checkbox"/>	ALLEN, AMBER (ALLE)	02/15/2017	Vacation	8.00	Requested
<input checked="" type="checkbox"/>	ALLEN, AMBER (ALLE)	02/16/2017	Vacation	8.00	Requested

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.