Time off Manager: Supervisor Guide

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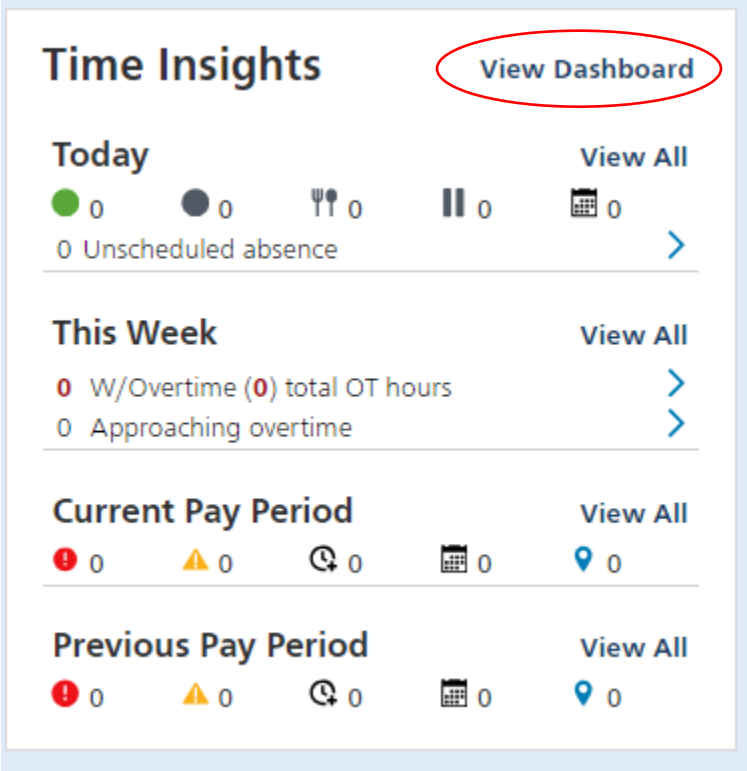
OVERVIEW

- In the **Time Off Manager**, employees can submit requests for time off to their manager for approval.
- To access the Time Off Manager:

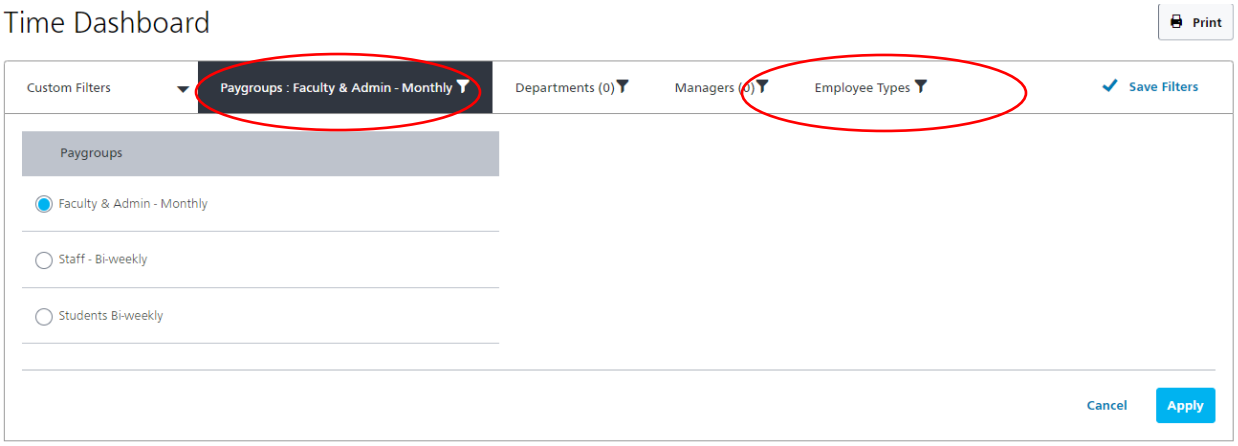
- Option 1) On the Homepage go to "**Time Insights**" > "**View Dashboard"**

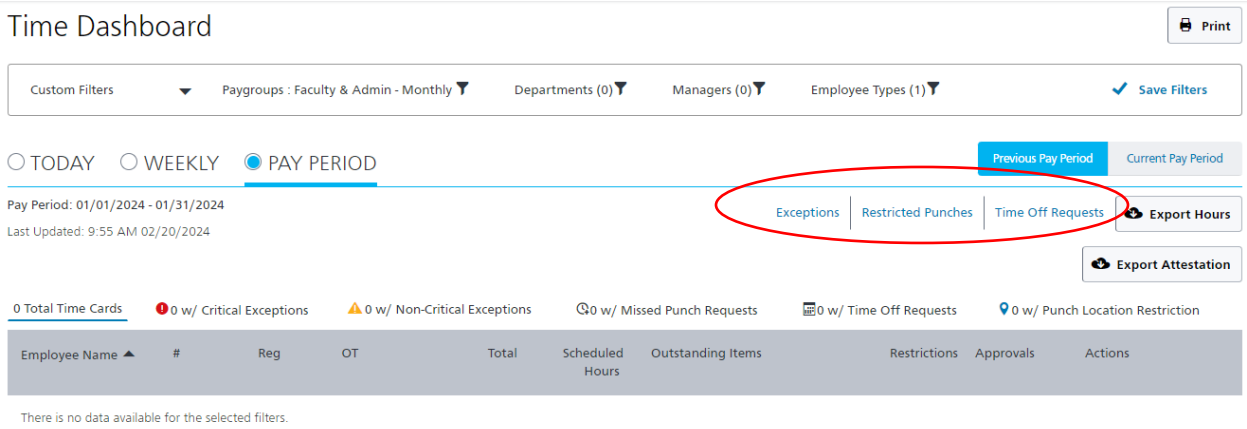


The **“Time Dashboard”** will assist with Time Off Approval and Time Card Approval

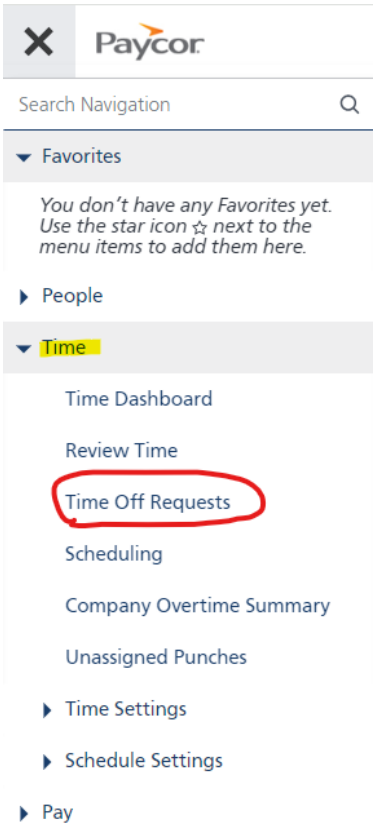
Under Custom Filters
You can change the filters at the top to the correct Paygroup (Faculty & Admin – Monthly or Staff – Bi-weekly).

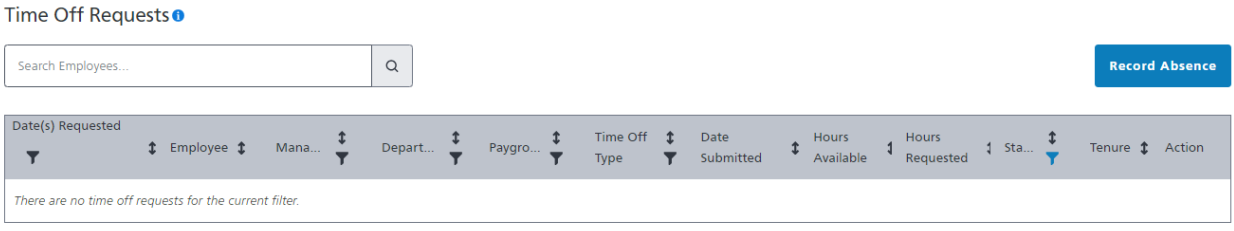
You can change the Employee Types to All Employees, Employees w/ Clock Access, or Employees w/ Time Card Activity.



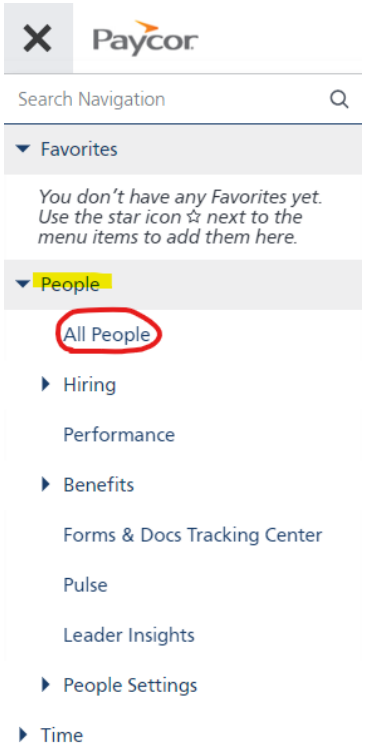


- Option 2) Navigate to “**Time”** > “**Time Off Requests”** on the Main Menu

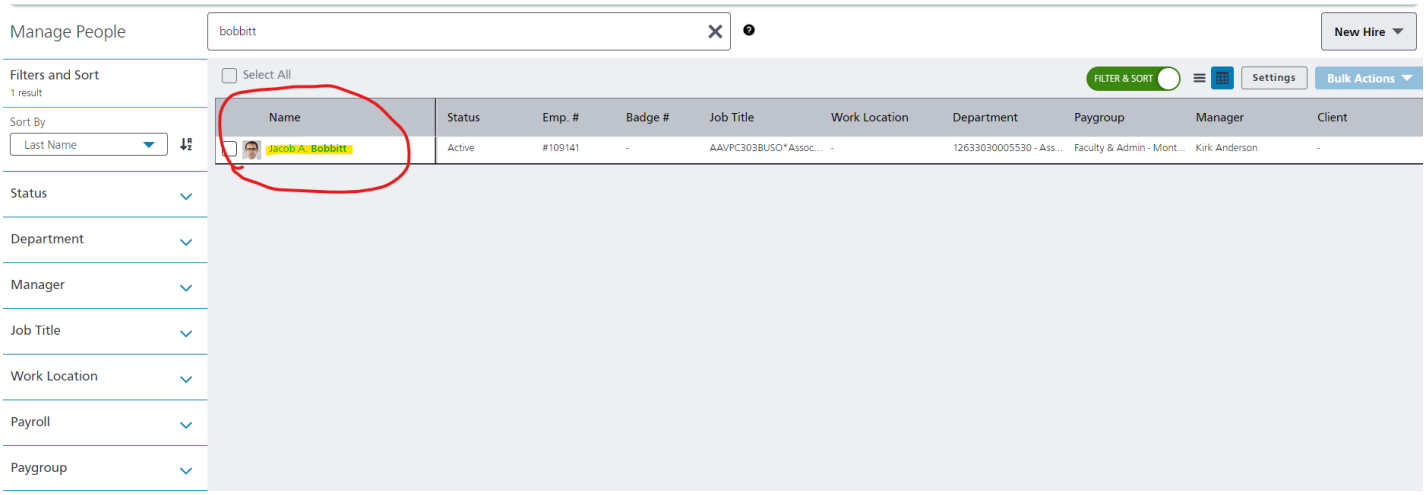




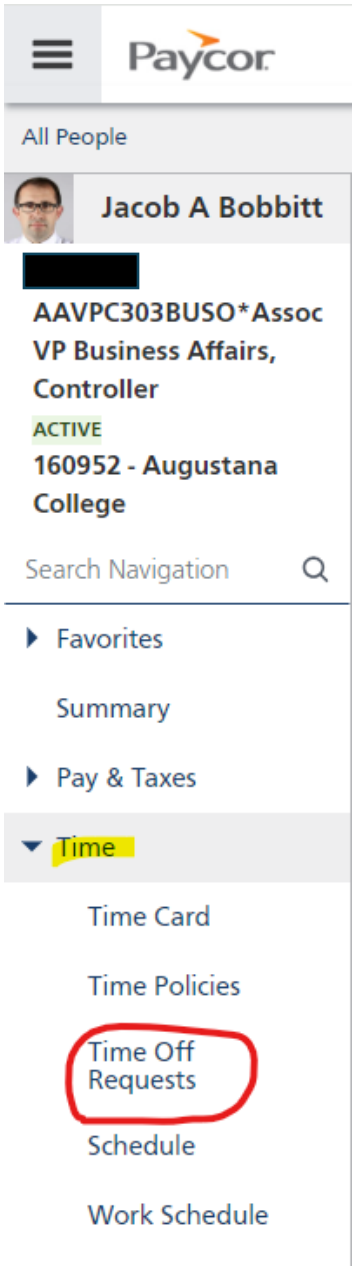
- Option 3) Navigate to **People** > **All People**..



Open an **Employee's Profile** by clicking the **Employee Name**.

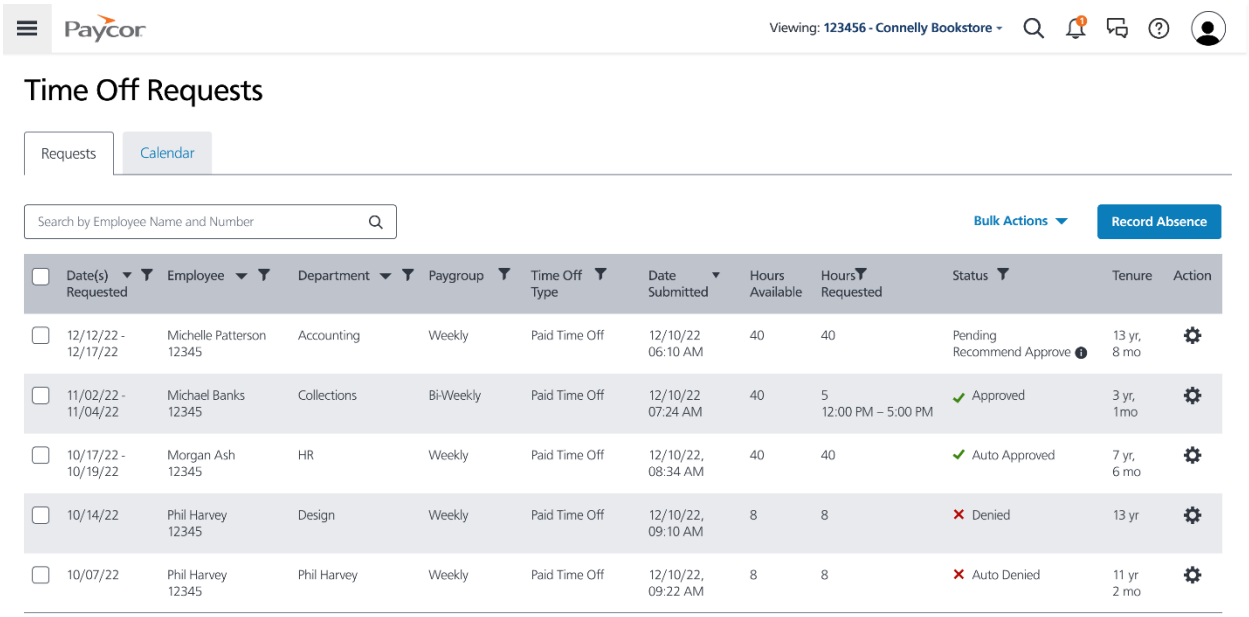


Select Time > Time Off Requests



MANAGING TIME OFF

- All employee requests are available in **Time > Time Off Requests**. To manage requests for employees, you must be assigned as their direct manager with the **Manager** role. (IF YOU DO NOT SEE ONE OF YOUR EMPLOYEES THEN PLEASE REACH OUT TO PAYROLL OR HUMAN RESOURCES)
- **Time Off Requests** should look like the screenshot below:



Review the features for the **Time Off Requests**:

- Search bar: search for specific employees
- **Bulk Actions**: Export Time Off Request data as a CSV
- **Record Absence**: See the section Entering a Time Off Request or Recording an Absence
- Column fields:
    - **Date(s) Requested**: Use this field to change the date range. The default date range is one month prior to the current day to three months after the current day.
    - **Employee**: Sort employees in alphabetical order.
    - **Manager**: Filter time off requests by **Manager**.
    - **Department**: Filter time off requests by **Department**.
    - **Paygroup**: Filter time off requests by **Paygroup**.
    - **Time Off Type**: Filter time off requests by **Time Off Type** (either Paid Time Off or Vacation)
    - **Date Submitted**: Sort in ascending or descending order.
    - **Hours Available**: Sort in ascending or descending order.
    - **Hours Requested**: Sort in ascending or descending order.

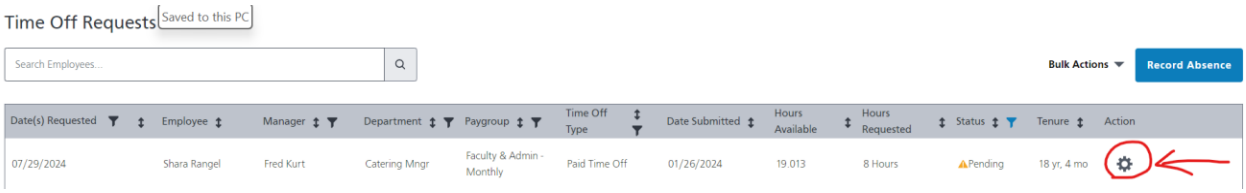
- **Status**: Filter time off requests by **Status**.
  - **Note**: An **Auto Approved** or **Auto Denied** status is created if you are using the **Auto Approve/Deny** feature of **Time Off Advisor**.
- **Tenure**: Sort in ascending or descending order.
- **Action**: **Approve**, **Deny** or **View Details** by clicking on the Gear Icon symbol

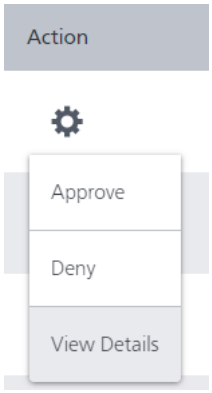
APPROVING OR DENYING A REQUEST

Follow these steps to take action on a time off request:

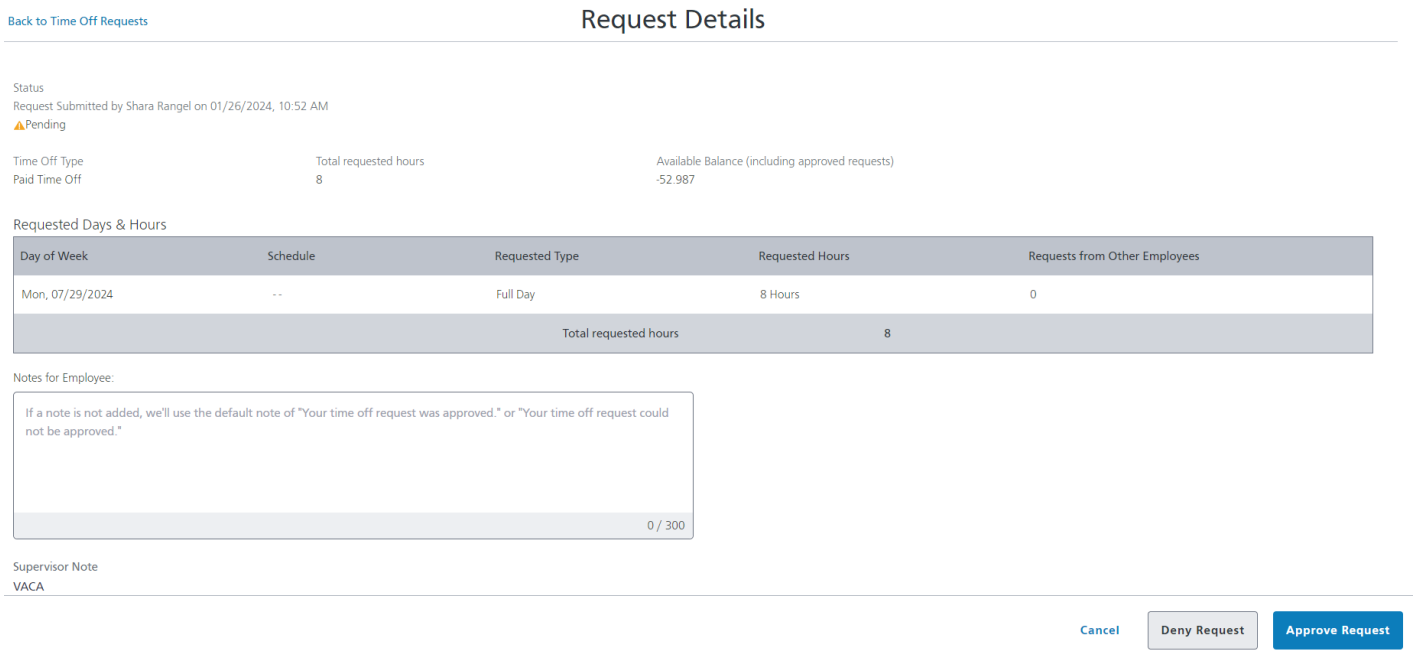
1. Hover on a line you want to work with and click the **gear icon.**

2. Click **Approve** or **Deny,** or click **View Details.**





3. Within **View Request Details**, select to either **Approve Request** or **Deny Request**. Within the details, review the requested hours, any scheduled hours or shifts for the employee, as well as any requests from other employees for the same day(s). The employee's available balance and their notes to you are also available.



4. If you select **Deny Request**, a comment is required. A sample response is provided, or type in another response.

5. Once an action is selected, a green message bar appears to confirm a notification has been sent to the employee.

Notes:

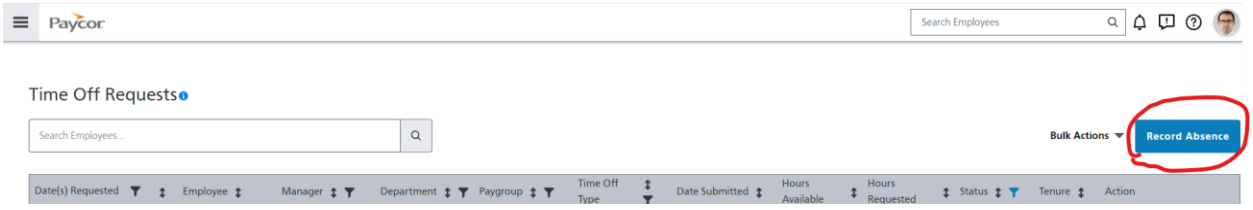
- Approved time off requests update available balances on the employee profile but will not automatically add those hours to the paygrid unless manually entered or imported (via time cards or file import).
- For any time off requests approved after the time off date has passed and the payroll for those days has already been processed, the available accrual balance will not update and will either need a manual accrual adjustment, or an admin must record the absence.

ENTERING A TIME OFF REQUEST OR RECORDING AN ABSENCE

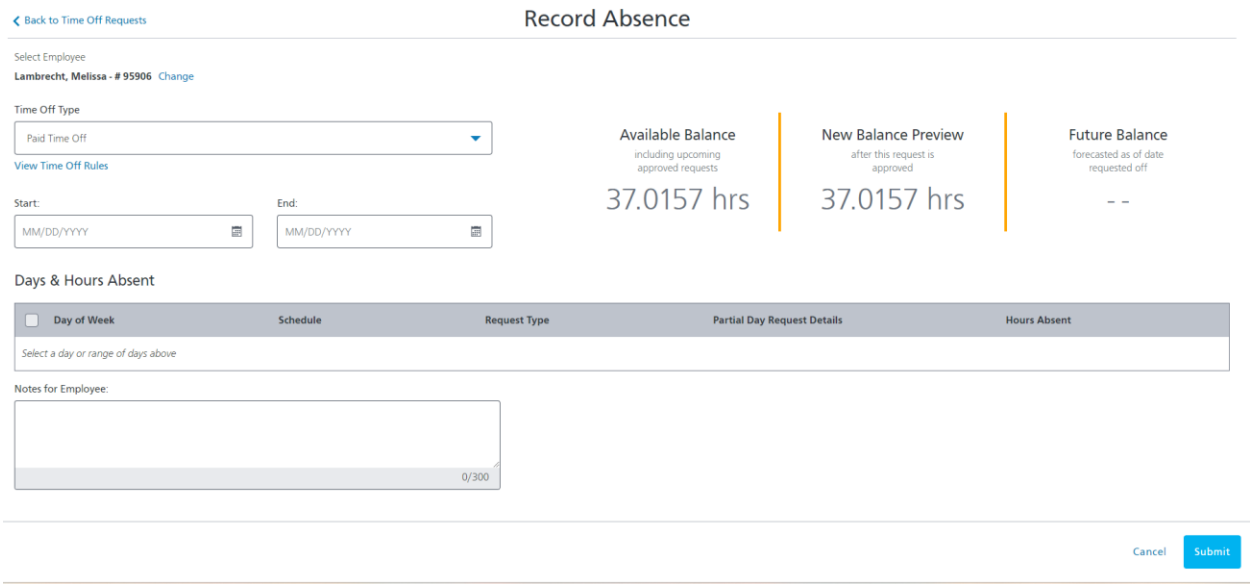
Follow these steps to submit a time off request or absence:

1. In **Paycor**, in the left column, click **Time** and then click **Time Off Requests**. The **Time Off Requests** screen appears.

2. At the upper-right, click **Record Absence**. The **Record Absence** window appears.



3. In the **Select Employee** field, search for the employee whose absence you would like to record.



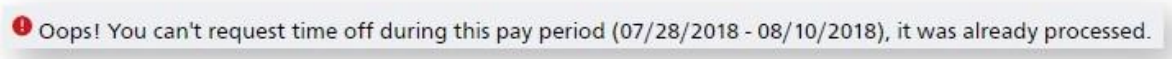
- The **Available Balance** shows the number of hours you have available. Upcoming approved time off requests have already been deducted from this number.
- The **New Balance Preview** shows the number of hours you will have available, once your current request is approved.
- The **Future Balance** shows how much time off you will have available on the date you selected as the **Start Date** of your time off request.

Notes:

- Next to the Employee Name you can **Change** the employee
- Under **Time Off Type**, if the Employee has Vacation then you can change between Paid Time Off and Vacation
- Beneath **Time Off Type**, you can review **Time Off Rules**

4. In the top-right part of the screen, you can view the employee's **Available Balance** and their **New Balance Preview**. The **New Balance Preview** takes into account previously approved time off requests. Complete these fields:

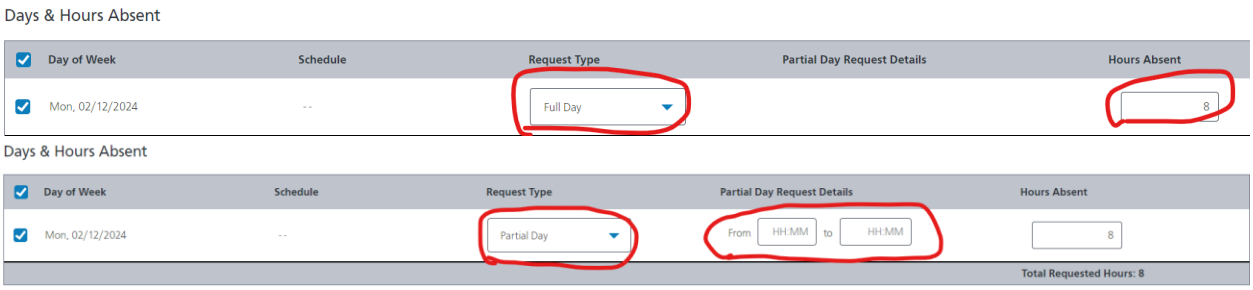
- **Time Off Type:** Select the type.
  - **Note:** If your organization only has one type available, no action is needed.
- **Start and End:** Select the date or date range. After you complete the **Start** and **End** fields, the **Days & Hours Absent** table updates.
  - If you request a single day, complete only the **Start** field.
  - If you request multiple days, complete **both** the **Start** and **End** fields.
  - You **cannot** request a date range across days that are not worked, such as Friday to Monday when Saturday and Sunday are **not** work days. In this case, you would enter Friday, and then separately enter Monday.
  - You can enter a date in the past, but **only** if the date has **not** been processed in a payroll. If the date you enter has been processed, this error message appears:



5. After the **Days & Hours Absent** table updates with your selections, in the **Request Type** column, for **each** day, select whether the request is for a **Full Day** or a **Partial Day**. If the request is for a **Partial Day**, enter the number of hours for the request in the **Partial Day Request Details** column.

  - If you use schedules, you can view scheduled hours or shifts to help enter the correct number of hours to request off in the **Schedule** column.
  - If the date(s) requested are holidays based on your assigned holiday policies, a message is displayed

6. In the **Notes for Supervisor** field, enter notes and click **Submit**.

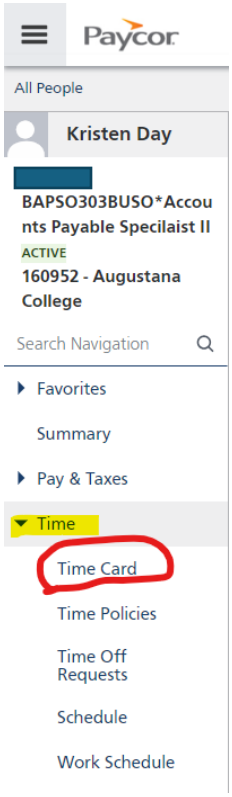


CHANGING A TIME OFF REQUEST

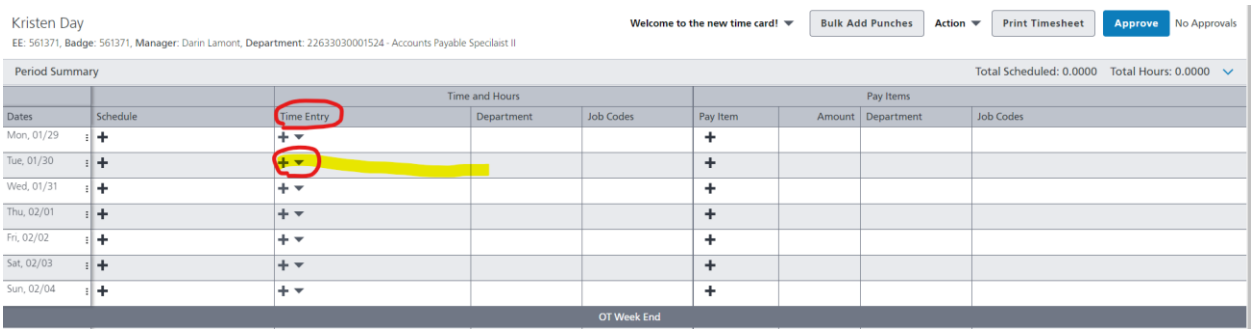
- Employees are able to edit requests that are still pending, including removing the request or editing the Accrual Balance used for the request, Number of Hours, or Date. You will receive a notification when a request has been updated.
- Once a time off request has been approved, the employee has the ability to cancel the request. You will receive a notification when a cancellation has been sent.
- Managers cannot edit pending time off requests, only employees can edit their own pending time off requests.
- Managers can edit approved time off from the timesheet.

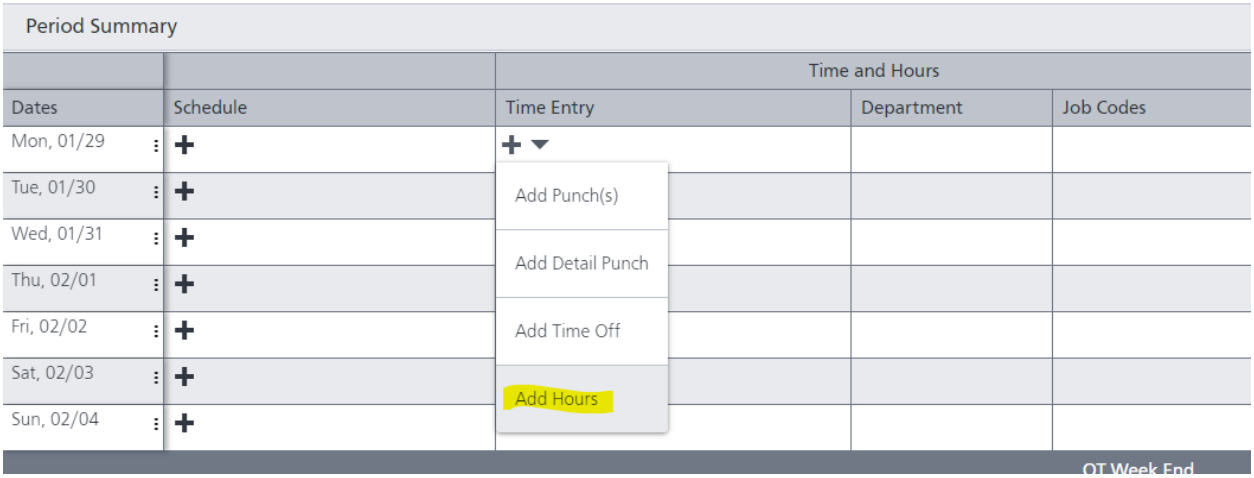
To edit a time off request:

- **OPTION 1:** Navigate to **Time** > **Time Off Requests**. Filter to find the time off request and click **View Details**. You can **Cancel** or **Deny** the time off request and recreate it.
- **OPTION 2:** Navigate to **People** > **All People**. Click on the employee's name. In the employee summary window, navigate to **Time** > **Time Off Requests** to view the employee's **Time Off Activity** screen. View the details of a time off request, cancel or deny the time off request and submit a new request using **Record Absence**.
- **OPTION 3:** Edit an employee's time off directly on their timesheet.

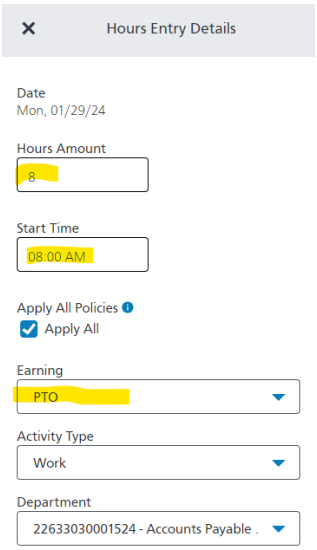


On the **Time Card – Time Entry click Add Hours**

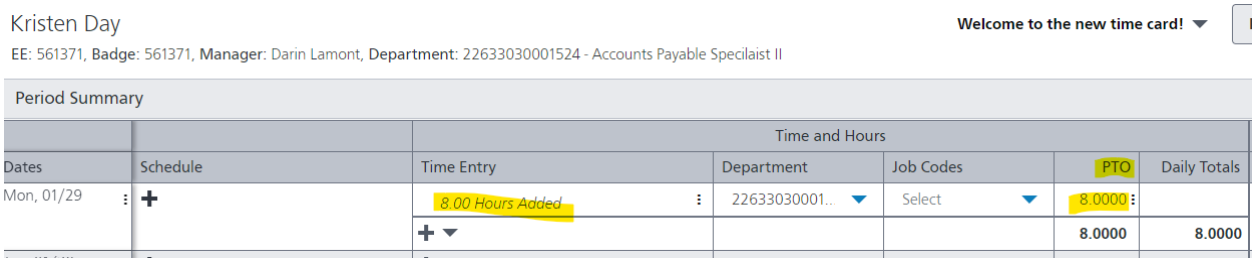
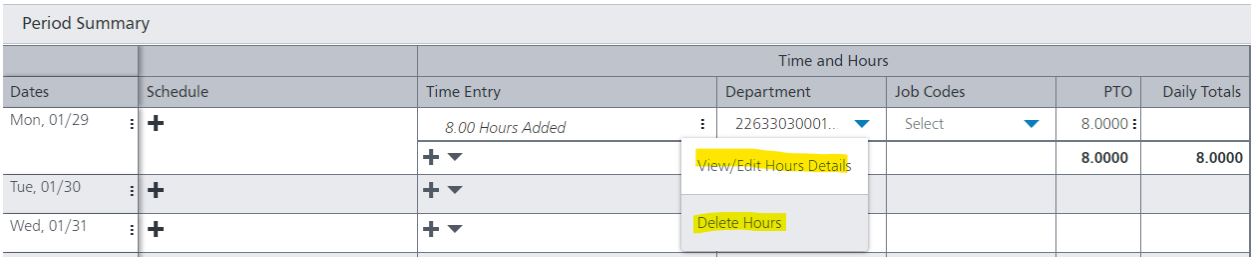




Enter the **Hours Amount** and the **Start Time**; change the Earning type to **PTO or VAC;** then click **SAVE**



The hours should now appear on the **Time Card**



If the hours are incorrectly added then next to the **Time Entry** click on the 3 dots to **View/Edit Hours Details** or **Delete Hours**