

## Respond to Employee’s Paid Time Off Request

**Overview:** This is a task executed by a Manager. An employee may have a banked number of hours in the categories shown in current balances that they can use to request paid time off (these numbers are for demonstration only – not a reflection of actual amounts).

### Current Balances

BANKED LIEU/OT	100.00	hours
BANKED STAT HOLIDAY	0.00	hours
MEDICAL/PERSONAL	0.00	hours
SICK	500.00	hours
VACATION	500.00	hours

### Paid Time Off Request Process:

1. Employee accesses **Time and Attendance** and uses **Time Off Calendar** and selects date(s) they want, the type of time off request (banked OT, medical/personal, vacation, sick, or banked stat holiday time) and submits the time off request through UltiPro to their Manager.
2. UltiPro sends the Manager a notification of request to their Salvation Army email.
3. On a daily basis the Manager accesses **Time and Attendance** and views the details of the time off request in their **Time and Attendance ToDos Box**.
4. The Manager reviews the request and chooses to accept or deny.
5. The Manager’s response is sent to the employee’s Salvation Army email and **Time and Attendance Messages Inbox**. If the Manager accepts the request a checkmark displays on the date(s) requested in the employee’s **Time Off Calendar**. If the request is denied, the Manager includes an explanation for denial and the request is removed from the employee’s **Time Off Calendar**.
6. Before the end of the pay period the Manager accesses **Time and Attendance** and uses the **Supervisor Approval** option to view and approve all employee absences and overtime hour entries (see job aid – **Approving Employee Timesheet**).

**Note:** If the employee tries to make a request from a category where they have no hours left, the system will deny the action. As the employee’s paid time off requests are approved, their PTO Current Balances are modified.

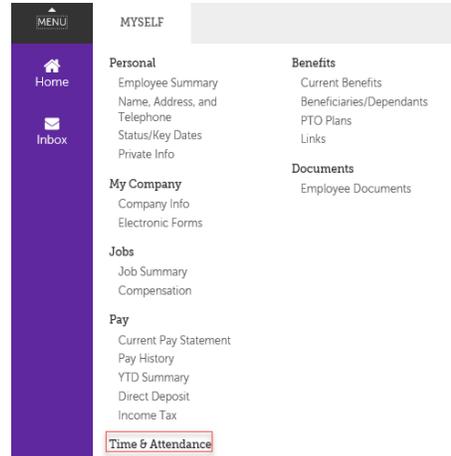
### Exceptional Time off Request:

If the employee has no access to a computer, is incapacitated, requires unpaid time off or needs a time off type that is not covered by the request choices (banked OT, medical/personal, vacation, sick, or banked stat holiday) they can ask a Timekeeper or Manager for assistance. The Manager or Timekeeper then enters these exceptional requests directly into an employee’s timesheet. The entry of overtime hours is also done this way. (These timesheet edits are not detailed in this job aid – see job aids **Update a TimeSheet with an Absence** and **Entering Overtime Hours**).

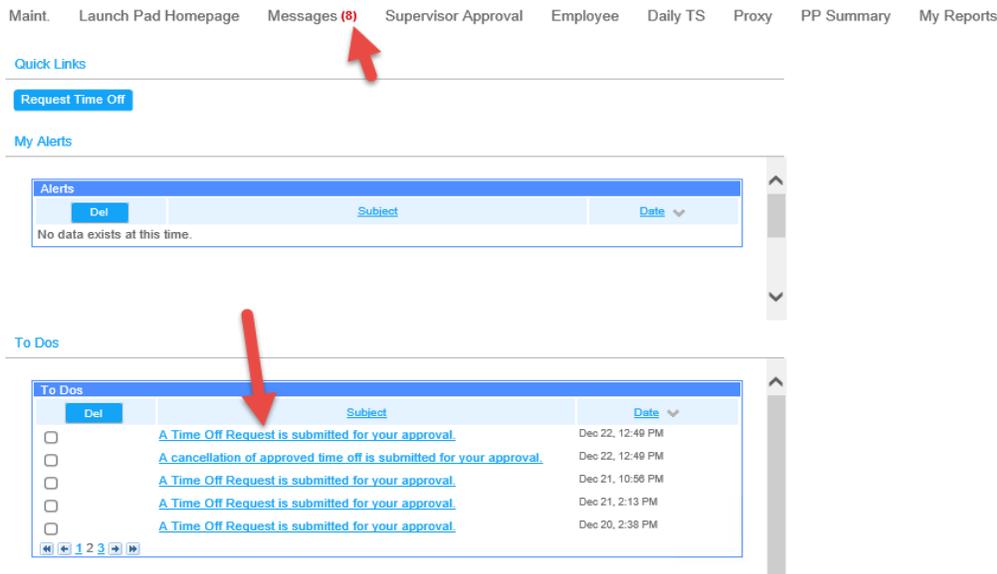
### Exceptional Time Off Request Process:

1. Employee emails/asks Timekeeper or Manager to enter an absence or overtime hours.
2. The Timekeeper or Manager accesses and edits employee time sheet in **Time and Attendance** to show requested absence or overtime hours.
3. If timesheet edits are made by the Timekeeper, the Manager receives notice of the timesheet edit in their Salvation Army email and in **Time and Attendance** messages.
4. The Employee does not receive any email/messages inbox notifications from UltiPro.
5. Timesheet edits require manager approval before biweekly submission to Payroll.

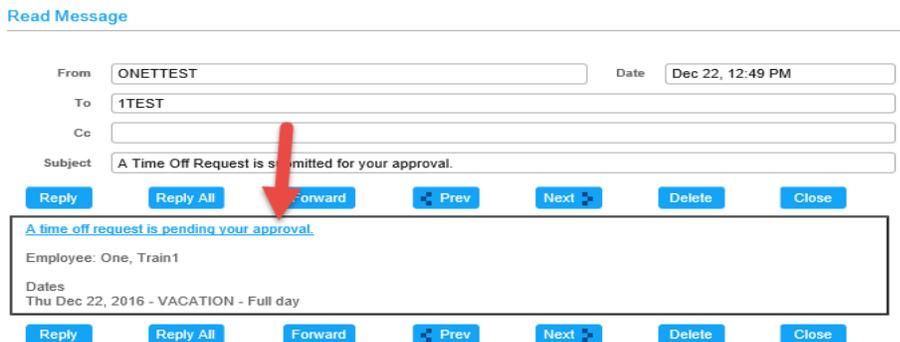
1. Click **Time and Attendance** in the UltiPro main menu.



2. The **Time and Attendance Launch Pad Homepage** displays. The number of unprocessed requests shows beside **Messages** at the top of the page. The requests are listed in the **To Dos** box. Click an underlined request in the **To Dos** box to read the request details.



3. The details of the selected request display, showing date requested and the employee's name. Click the underlined request to begin processing it.



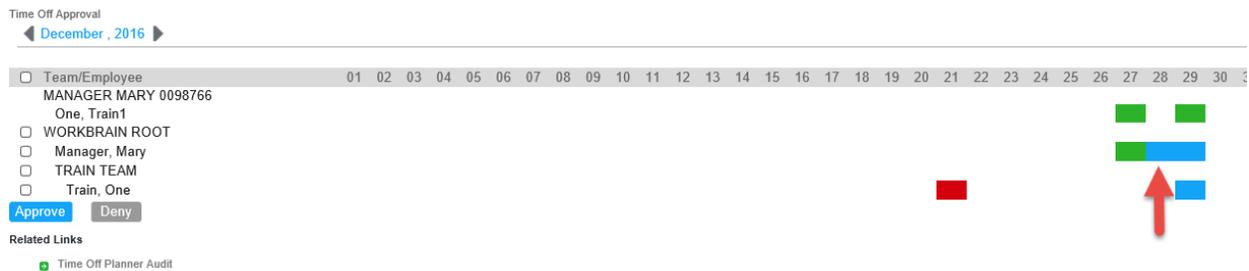
- The **Time off Approval Screen** displays. This screen shows all requests from your team for the month allowing you to identify time off request conflicts as you decide to accept/deny requests. Our example shows only one employee with request but if more team members were requesting time off they would display here as well. Use the left and right arrows to scroll through the months.

**Blue line** = new time off request – requires Manager action

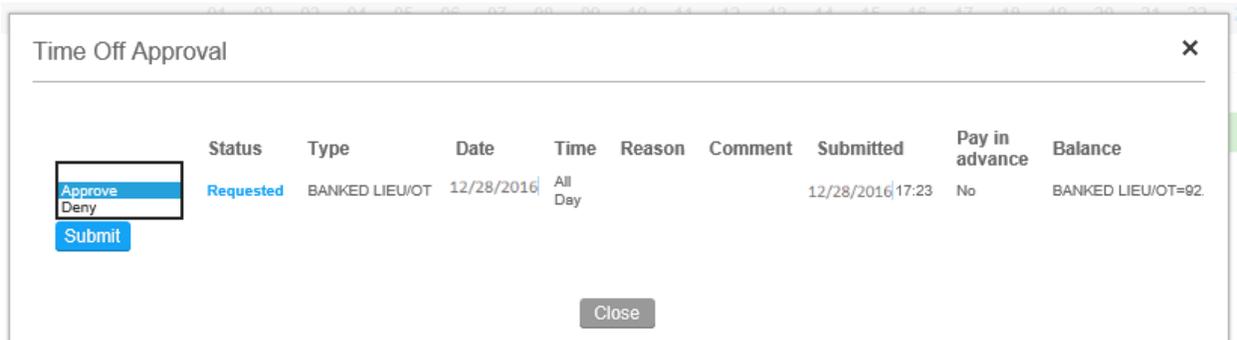
**Red line** = employee requesting cancellation of previous request – requires Manager action

**Green line** = approved requests – Manager action taken

**Black line** = (not shown) employee cancellation request accepted or request denied– Manager action taken



- Click on the blue line below a date to view the details of an individual request.
- The **Time Off Days** information displays. In this example the employee is requesting to use Banked OT to take Dec 28, 2016 off. Click Approve or Deny. In this example we select **Approve**.
- Click **Approve** and then click **Submit**.



Status	Type	Date	Time	Reason	Comment	Submitted	Pay in advance	Balance
Requested	BANKED LIEU/OT	12/28/2016	All Day			12/28/2016 17:23	No	BANKED LIEU/OT=92

- The **Approval Comment** box displays. Comments are optional for approval. (If the request is denied, a comment must be typed in so the employee is notified of the reason for rejection, for example, *short staffed that day*). Click **Submit**.

03 04 05 06 07 08 09 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

 **Approval Comment**

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Comment:

Submit
Cancel



- The time slot changes to **green** indicating an accepted request for paid time off. A notice of acceptance will show in the employee’s **Time and Attendance Messages Inbox** and their calendar entry will change from a question mark to a checkmark.

If the request is denied, an employee receives notice of why in their **Messages Inbox**, and the entry is removed from the employee’s **Time Off Calendar**.

01 02 03 04 05 06 07 08 09 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31



- Employees may submit multiple requests in one submission. Click accept/deny for each request then click Submit.

11. At bottom left of the screen there is a link to a **Time off Planner Audit**. Click to display.

**Related Links**

1. [Time Off Planner Audit](#)

12. The Time off Planner Audit displays historical detail about your time off request decisions. You can search by requestor name by entering name and clicking **Find**.

Time Off Planner Audit  **Find** ▾

Employee	Full Name	Requester	Create Date	Status	Action Required	Date Requested	Partial Request Start	Partial Request End	Reason	Request Comment	Approver	Date Approved
3000147-TEST	Hotrum, Michael	HOTRUMM	08/14/2017	CANCELLED	N	08/24/2017					1	08/15/2017
3000162-TEST	Admin, Paula	P@TSA.CA	08/17/2017	CANCELLED	N	08/24/2017					1	08/18/2017
3000149-TEST	MAnager, Steve	MANAGERS	06/28/2017	DENIED	N	06/29/2017					1	07/28/2017
3000149-TEST	MAnager, Steve	MANAGERS	06/28/2017	DENIED	N	07/04/2017					1	07/28/2017
3000149-TEST	MAnager, Steve	MANAGERS	06/28/2017	DENIED	N	07/05/2017					1	07/28/2017
3000149-TEST	MAnager, Steve	MANAGERS	06/28/2017	DENIED	N	06/30/2017					1	07/28/2017
3000161-TEST	employee, sam	EMPLOYEES	06/28/2017	APPROVED	N	06/29/2017					1	07/28/2017
3000161-TEST	employee, sam	EMPLOYEES	06/28/2017	APPROVED	N	07/06/2017					1	07/07/2017
3000161-TEST	employee, sam	EMPLOYEES	06/28/2017	APPROVED	N	07/07/2017					1	07/07/2017
3000162-TEST	Admin, Paula	P@TSA.CA	07/07/2017	APPROVED	N	07/10/2017					1	07/07/2017
3000162-TEST	Admin, Paula	P@TSA.CA	07/07/2017	APPROVED	N	07/07/2017					1	07/07/2017
3000147-TEST	Hotrum, Michael	HOTRUMM	07/24/2017	APPROVED	N	07/04/2017					1	07/28/2017
3000147-TEST	Hotrum, Michael	HOTRUMM	07/24/2017	APPROVED	N	07/05/2017					1	07/28/2017
3000147-TEST	Hotrum, Michael	HOTRUMM	07/24/2017	APPROVED	N	07/06/2017					1	07/28/2017

13. More search criteria is available by clicking on the **down arrow** – this displays the following options. Click in each field to select desired filter criteria and click **Go** to display the filtered information.

Time Off Planner Audit  **Find** ▲

Employee	<input type="text"/>	Full Name	<input type="text"/>	Requester	<input type="text"/>
Create Date	<input type="text"/>	Status	<input type="text"/>	Action Required	<input type="text"/>
Date Requested	<input type="text"/>	Partial Request Start	<input type="text"/>	Partial Request End	<input type="text"/>
Reason	<input type="text"/>	Request Comment	<input type="text"/>	Approver	<input type="text"/>
Date Approved	<input type="text"/>	Is Approved	<input type="text"/>	Approval Comment	<input type="text"/>
Cancel Approver	<input type="text"/>	Date Cancel Approved	<input type="text"/>	Cancel Approved	<input type="text"/>
Cancel Approval Comment	<input type="text"/>				

**Go** [Clear](#)

Employee	Full Name	Requester	Create Date	Status	Action Required	Date Requested	Partial Request Start	Partial Request End
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