

Respond to Employee’s Paid Time Off Request

Overview: This is a task for a Manager.

An employee may have a banked number of hours in the categories shown below that they can use to request paid time off (these numbers are for demonstration only – not a reflection of actual amounts).

Current Balances

| Name | Today | EOY | Type |
|---------------------|-------|-------|-------|
| BANKED LIEU/OT | 100.0 | 92.0 | hours |
| MEDICAL/PERSONAL | 14.0 | 6.0 | hours |
| VACATION | 500.0 | 476.0 | hours |
| SICK | 492.0 | 500.0 | hours |
| BANKED STAT HOLIDAY | 0.0 | 0.0 | hours |

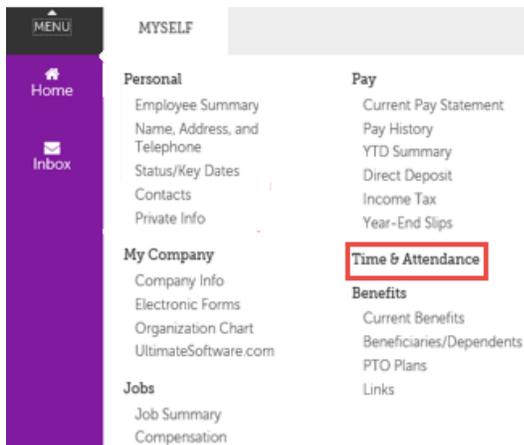
In the **Time Off Calendar** the employee chooses the date(s) they want, indicates the type of time off request – banked OT, medical/personal, vacation, sick, or banked stat holiday time - and submits the request. UltiPro sends this request to their manager’s **Time and Attendance ToDo Box**. The manager reviews the request and decides to accept or deny. The manager’s response is sent to the employee’s **Time and Attendance Messages Inbox** and it displays a checkmark (if accepted) on the requested date in the employee’s **Time Off Calendar**.

If the request is denied, a manager includes an explanation for denial. The employee receives the response in their **Messages Inbox**, and the request is removed from the manager’s **Time Off Approval** display and the employee’s **Time Off Calendar**.

Note: As employee requests are approved, their PTO balances change. If the employee tries to make a request from a category that has no hours available, the system will deny the action.

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

Main Menu



The screenshot shows the main menu of the UltiPro system. On the left is a vertical purple sidebar with 'Home' and 'Inbox' icons. The main content area is titled 'MYSELF' and is divided into several sections: 'Personal' (Employee Summary, Name, Address, and Telephone, Status/Key Dates, Contacts, Private Info), 'My Company' (Company Info, Electronic Forms, Organization Chart, UltimateSoftware.com), 'Jobs' (Job Summary, Compensation), 'Pay' (Current Pay Statement, Pay History, YTD Summary, Direct Deposit, Income Tax, Year-End Slips), 'Time & Attendance' (highlighted with a red box), and 'Benefits' (Current Benefits, Beneficiaries/Dependents, PTO Plans, Links).

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

Maint. [Launch Pad Homepage](#) [Messages \(8\)](#) [Supervisor Approval](#) [Employee](#) [Daily TS](#) [Proxy](#) [PP Summary](#) [My Reports](#)

[Quick Links](#)

[Request Time Off](#)

[My Alerts](#)

Alerts

| Del | Subject | Date |
|------------------------------|---------|------|
| No data exists at this time. | | |

[To Dos](#)

To Dos

| Del | Subject | Date |
|--------------------------|---|------------------|
| <input type="checkbox"/> | A Time Off Request is submitted for your approval. | Dec 22, 12:49 PM |
| <input type="checkbox"/> | A cancellation of approved time off is submitted for your approval. | Dec 22, 12:49 PM |
| <input type="checkbox"/> | A Time Off Request is submitted for your approval. | Dec 21, 10:56 PM |
| <input type="checkbox"/> | A Time Off Request is submitted for your approval. | Dec 21, 2:13 PM |
| <input type="checkbox"/> | A Time Off Request is submitted for your approval. | Dec 20, 2:38 PM |

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

Read Message

From: Date:

To:

Cc:

Subject:

[A time off request is pending your approval.](#)

Employee: One, Train1

Dates
Thu Dec 22, 2016 - VACATION - Full day

- 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 wants to cancel a previous request – requires manager action

Green line = already approved/denied requests – manager action taken

Black line = (not shown) employee cancellation request accepted – manager action taken

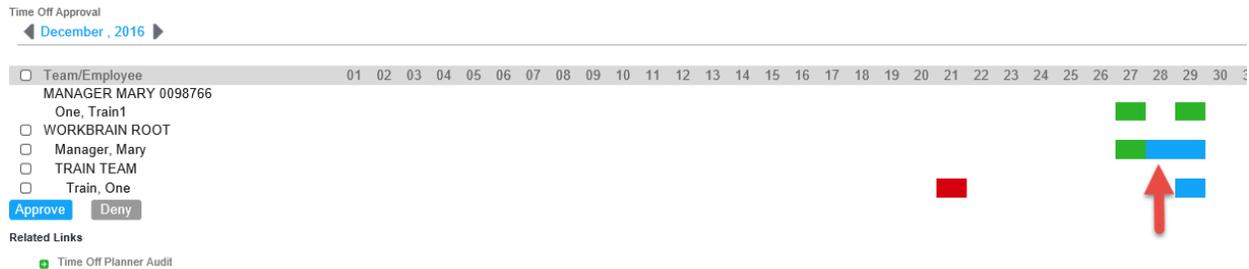
Time Off Approval

◀ December , 2016 ▶

Team/Employee
 MANAGER MARY 0098766
 One, Train1
 WORKBRAIN ROOT
 Manager, Mary
 TRAIN TEAM
 Train, One

Related Links

[Time Off Planner Audit](#)



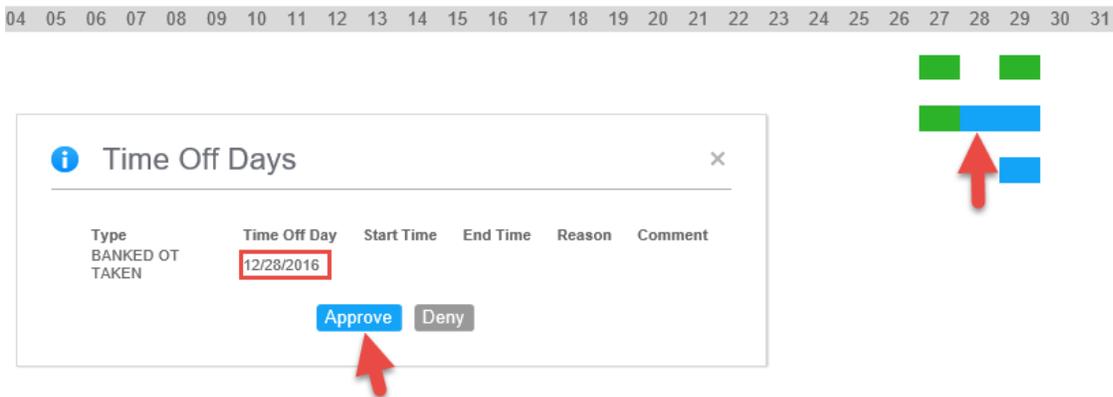
- Blue lines** indicate new requests that require action. Click on the line below a date to view the details of an individual request.

- 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**.

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

Time Off Days [X]

| Type | Time Off Day | Start Time | End Time | Reason | Comment |
|-----------------|--------------|------------|----------|--------|---------|
| BANKED OT TAKEN | 12/28/2016 | | | | |



- 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**.



- 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 manager's **Time Off Approval** display and the employee's **Time Off Calendar**.



- Employees may submit multiple requests in one submission. When the manager clicks on these they display as shown below. Click accept/deny for each request then click Submit.

NEED GRAPPHIC

- Continue to process time off requests (**blue** and **black** lines) or click the icon at the top of the screen beside your name to exit **Time and Attendance**.

