# SUPERVISORY TRAINING FOR APPROVING TIME OFF REQUESTS

**On ADP Workforce Now** 

https://workforcenow.adp.com

September 2019

How to Process a Time Off Request – Pages 2 - 7

Entering a Time Off Request on an Employee's Behalf – Pages 8 - 10

**Delegating Time Off Approvals – Pages 11 – 13** 

**Time Off Policy Options – Page 14** 

# PROCESSING EMPLOYEE'S TIME OFF REQUEST

		Ma 🗄	Ø		BRIGHT
	0	O Urg∉kt	1	NOTIFICATIONS 0 Urgent	2
✓ Hahn, B Employ	renda ee - Time Off	Request: Hahn, Brenda		11:35 PM	
		VIEW ALL MESSAGES			

# Login in to Workforcenow:

https://workforcenow.adp.com

## STEP 1

## Message Center:

**Pending actions** like **time off approvals** will be listed under **"Tasks".** You have a pending time off request from Brenda Hahn. Click on **"View All Messages."** 

HOME	RESOURCES	MYSELF	MY TEAM	REPORTS			Search	
Mess	age Cer	iter 🛛						
🗹 ТА	<b>SKS</b> (2)		RECEIVED D	ATE 🗸 i descend	ING 🗸			
Urgent Tasks	Tasks (0)		Today JUL ( Hahn, Bren	05 2016 nda	Employee - Time Off Request: Hahn,	Unread	11:35 PM	00
Comple	eted Tasks(1)		Submitted	On= 07/05/2016	Brenda			
Vraent	DTIFICATIONS (2 Notifications (0)	2)	Request Pe Time Off Po Time Off Re Amount= 2	riod= 07/11/2016 - 07 olicy= Vacation eason Code= Vacatio 1.00 Hours	/13/2016 n			
Notifica	ations (2)							

## STEP 2

Select **"Tasks".** You can **Approve** ( $\sqrt{}$ ) or **Deny** (**X**) the Requests using the appropriate icons.

HOME	RESOURCES	MYSELF	MY TEAM	REPORTS			Search	C
Mess	sage Cen	iter 0						
🗹 т/	<b>SKS</b> (2)		RECEIVED D	DATE 🗸 🕴 DESCEND	ING 🗸			
Urgent	Tasks (0)		Today JUL	05 2016				
Tasks Compl	1) eted Tasks(1)		Hahn, Brei	nda On= 07/05/2016	Employee - Time Off Request: Hahn, Brenda	Unread	11:35 PM	<b>⊗ 8 .</b> Ľ
<b>1</b>	DTIFICATIONS (2	2)	Request Pe Time Off Pe Time Off Re	eriod= 07/11/2016 - 07 olicy= Vacation eason Code= Vacatio	/13/2016 in			REVIEW
Urgent	Notifications (0)		Amount= 2	1.00 Hours				REJECT
Notific	ations (2)							VIEW HISTORY

To review the request details, selection the Actions Icon (...) and select "Review".

HOME	RESOURC	es myself	MY TEAM	REPORTS			
						Balances As Of	7/13/2016 🚔 🥂
Time (	Off Reque	st for Brenda	Hahn			Time Off Policy	Balance
Status						Jury Duty	40.00 hours
Submit	tod Dur uses	Oval by Albright, Ant	nony			 Personal	40.00 hours
Submit	led By: Hahn,	Brenda on 07/05/201	6			Sickft	40.00 hours
Date Ra	ange					Vacation	80.00 hours
Start D 07/11/ Include	Day: / <b>2016</b> To s every day from	End Day: 07/13/2016 07/11/2016 to 07/13/2	016.				
Reques	st Details						
VIE	W EACH DAY	DIVIDUALLY			CHECK SCHE	E	
DAT	E	TIME OFF POLICY	AMOU	JNT S	TART TIME		
Mon, Wed,	Jul 11, 2016 - Jul 13, 2016	Vacation - Vacatio	n 3 x 7.0	0 hours 0	B:30 AM		
Total	: Includes 3 da	ays	21.00	hours			

## STEP 4

Click View Each Day Individually.

Time Off Request fo Status: PENDING Approval b Submitted By: Hahn, Brend Date Range Start Day: End 07/11/2016 To 07//	r Brenda Hahr ay Albright, Anthony a on 07/05/2016	ı		•	Balances As Of : Time Off Policy Jury Duty Personal Sickft Vacation	7/13/2016 4 4 4 4 8	Balance 0.00 hours 0.00 hours 0.00 hours 0.00 hours
Request Details	Review Each Da	ay Individually	CHECK SCHEDULE	~			
DATE TIME	E OFF POLICY	AMOUNT	START TIME				
Mon, Jul 11, 2016 Vaca	tion - Vacation	7.00 hours	08:30 AM				
Tue, Jul 12, 2016 Vaca	tion - Vacation	7.00 hours	08:30 AM	ł			
Wed, Jul 13, 2016 Vaca	tion - Vacation	7.00 hours	08:30 AM	1			
Total: Includes 3 days		21.00 hours					

View the request. Brenda is requesting 3 days.

					Balances As Of :	7/13/2016	C
ime Off Reque	est for Brenda Hah	nn		T	ime Off Policy		Balance
tatus' PENDING An	aroval by Albright Anthony				ury Duty	40.	00 hours
ubmitted By: Hab	Bronda on 07/05/2016			P	ersonal	40.	00 hours
donnited by. nam	n, brenda on 07/05/2010			S	lickft	40.	00 hours
Date Range				V	acation	80.	00 hours
Start Day:	End Day:						
07/11/2016 To	07/13/2016						
Includes every day fro	m 07/11/2016 to 07/13/2016.						
				-			
Request Details				E			
Request Details	Review Each [	Day Individually	CHECK SCHEDULE	-			
COLLAPSE ROWS	Review Each I	Day Individually	CHECK SCHEDULE	н •			
COLLAPSE ROWS DATE Mon, Jul 11, 2016	Review Each I TIME OFF POLICY Vacation - Vacation	AMOUNT 7.00 hours	CHECK SCHEDULE START TIME 08:30 AM	ш Х			
COLLAPSE ROWS DATE Mon, Jul 11, 2016 Tue, Jul 12, 2016	Review Each I TIME OFF POLICY Vacation - Vacation Vacation - Vacation	AMOUNT 7.00 hours 7.00 hours	CHECK SCHEDULE START TIME 08:30 AM 08:30 AM	F			
DATE Mon, Jul 11, 2016 Tue, Jul 12, 2016 Wed, Jul 13, 2016	Review Each I TIME OFF POLICY Vacation - Vacation Vacation - Vacation Vacation - Vacation	AMOUNT 7.00 hours 7.00 hours 7.00 hours	CHECK SCHEDULE START TIME 08:30 AM 08:30 AM 08:30 AM	E			

#### STEP 6

You can view her time off balances. As of the last day in this request, she will have sufficient hours to take these vacation days.

T: 0// D					Balances As Of :	7/13/2016 🛗 🤆
Time Off Reque	est for Brenda Ha	hn			Time Off Policy	Balance
Status: PENDING App	roval by Albright, Anthony				Jury Duty	40.00 hours
Submitted By: Hahr	Brenda on 07/05/2016				Personal	40.00 hours
					Sickft	40.00 hours
Date Range					Vacation	80.00 hours
Start Day: 07/11/2016 To Includes every day from Request Details COLLAPSE ROW	End Day: 07/13/2016 m 07/11/2016 to 07/13/2016. Review Each	Day Individually	CHECK SCHED	E DULE 🗸		
DATE	TIME OFF POLICY	AMOUNT	START TIME	_		
Mon, Jul 11, 2016	Vacation - Vacation	7.00 hours	08:30 AM	_		
Tue, Jul 12, 2016	Vacation - Vacation	7.00 hours	08:30 AM	_		
Wed, Jul 13, 2016	Vacation - Vacation	7.00 hours	08:30 AM			

To ensure you have adequate coverage for your team click "**Check Schedule**".

Brenda Hah Ibright, Anthony n 07/05/2016 IV: 2016 6 to 07/13/2016.	ın			Balances As Of: Time Off Policy Jury Duty Personal Sickft Vacation	7/13/2016 Balance 40.00 hou 40.00 hou 40.00 hou 80.00 hou			
Review Each D	)ay Individually		LE 🗸	My Team Time Off Date Requested Tir	ne Off Policy	-	Status	Date Submitted
n - Vacation	7.00 hours	08:30 AM		07/11/2016	,			
n - Vacation	7.00 hours	08:30 AM	l	Martinez, Raul Va	cation-Vacation		Approved	06/30/2016
n - Vacation	7.00 hours	08:30 AM	- 1					
	21.00 hours		- 1					
DENY		APPROVE						

#### **SCENARIO:**

Raul Martinez has already been approved for a vacation day on July 11<sup>th</sup> the same day as Brenda is requesting.

If having more than one person off on the same day poses a concern for coverage, you will want to **Deny** Brenda's vacation day requests for 7/11 You can **Approve** her vacation requests for 7/12 and 7/13.

**Note:** To close the **My Team Off Schedule**, click on **Check Schedule** again or anywhere on the time off request page.

Off D		Ulahan				Balances As Of :	7/13/2016	<b>m</b> (
me Off Reque	est for Brenda	Hann				Time Off Policy		Balanc
atus: PENDING App	proval by Albright, Anth	iony			*	Jury Duty	40	0.00 hour
ubmitted By: Hah	n, Brenda on 07/05/201	6				Personal	4(	).00 hour
ate Range						Sickft	40	0.00 hour
Start Day: 07/11/2016 To Includes every day fro equest Details COLLAPSE ROWS	End Day: 07/13/2016 m 07/11/2016 to 07/13/2 Keview E	016. ach Day Individually	c	HECK SCHEDULE 🗸	E			
ACTION	DATE	TIME OFF POLICY	AMOUNT	START TIME				
• Approve 🗸	Mon, Jul 11, 2016	Vacation - Vacation	7.00 hours	08:30 AM	-			
* Approve 🗸	Tue, Jul 12, 2016	Vacation - Vacation	7.00 hours	08:30 AM				
* Approve 🗸	Wed, Jul 13, 2016	Vacation - Vacation	7.00 hours	08:30 AM				
Total: Includes 3 of	lavs		21.00 hours		-			
CANCEL REQUEST				PROCESS				

Click on **Review Each Day Individually** so you can apply different actions to each day.

TI OKD		0.1				Balances As Of :	7/13/2016	₿ C
Time Off Reque	est for Brenda	Hann				Time Off Policy		Balance
Status: PENDING Apr	roval by Albright, Anth	IOUN				Jury Duty	40	0.00 hours
Submitted By: Hab	Brenda on 07/05/201	6				Personal	40	0.00 hours
						Sickft	40	0.00 hours
Date Range						Vacation	80	0.00 hours
Start Day:	End Day:							
07/11/2016 To	07/13/2016							
Includes every day fro	m 07/11/2016 to 07/13/2	016.						
Request Details					Ε			
COLLAPSE ROWS	<ul> <li>Review E</li> </ul>	ach Day Individually	CF	IECK SCHEDULE				
ACTION	DATE	TIME OFF POLICY	AMOUNT	START TIME				
• Approv 🖂 🗸	Mon, Jul 11, 2016	Vacation - Vacation	7.00 hours	08:30 AM				
Approve	Tue Jul 12 2016	Vacation - Vacation	700 hours	08-30 AM				
Dery	100, 501 12, 2010	Vacation - Vacation	1.00 110013	00.50 AM				
* Approve 🖌	Wed, Jul 13, 2016	Vacation - Vacation	7.00 hours	08:30 AM				
Total: Includes 3 c	lavs		21.00 hours		-			
CANCEL REQUEST				PROCESS				
					-			

#### STEP 9

The first action listed on the drop-down box is **"Approve".** 

If you want to deny the request, use the drop-down box to scroll down and select **"Deny"** in the action box next to the July 11th request.

	o Off Do		at for Dranda	Llaha				Balances As Of :	7/13/2016 🛗 C
m	e Oli Re	que	st for Brenda	Hann				Time Off Policy	Balance
St	art Day:		End Day:					Jury Duty	40.00 hour
07	7/11/2016	To	07/13/2016					Personal	40.00 hours
Inc	ludes every d	lay from	n 07/11/2016 to 07/13/2	016.				Sickft	40.00 hour
								Vacation	80.00 hour
eq	uest Deta	ils					10		
	COLLAPSE F	ROWS	<ul> <li>Review E</li> </ul>	ach Day Individually	Cł	HECK SCHEDULE	~		
	ACTION		DATE	TIME OFF POLICY	AMOUNT	START TIME			
•	Deny	~	Mon, Jul 11, 2016	Vacation - Vacation	7.00 hours	08:30 AM			
•	Approve	~	Tue, Jul 12, 2016	Vacation - Vacation	7.00 hours	08:30 AM	E		
•	Approve	~	Wed, Jul 13, 2016	Vacation - Vacation	7.00 hours	08:30 AM			
Т	otal: Include	es 3 d	ays		21.00 hours				
C	omments:								
4	Another Em off.	ploye	e is taking Monday						
-	CANCEL REG	UEST				PHOCESS			

Scroll down and you can add a **Comment** to explain to the employee why you partially approved the request. Click "**process**", and the partial approval is saved.

Time Off Reque	est for Brenda Hal	hn			?	Balances As Of : Time Off Policy	7/13/2016 🛗 (
Vour approva	al of the time off reque	est was submit	ted successfu	lly.	^	Jury Duty Personal	40.00 hou 40.00 hou
Status: MIXED Revie Submitted By: Hahr Date Range Start Day: 07/11/2016 To Includes every day fro Request Details	wed by Albright, Anthony on n, Brenda on 07/05/2016 End Day: 07/13/2016 m 07/11/2016 to 07/13/2016.	07/05/2016			E	Sickft Vacation	40.00 hou 66.00 hou
DATE	TIME OFF POLICY	AMOUNT	START TIME	STATUS	_		
Mon, Jul 11, 2016	Vacation - Vacation	7.00 hours	08:30 AM	DENIED			
Tue, Jul 12, 2016	Vacation - Vacation	7.00 hours	08:30 AM	Approved	-		

The approved request is automatically displayed on the employee's calendar.

The employee is notified through the **message center** and through **email notification** that their request has been approved or denied.

The employee's time off balances are updated automatically.

# **ENTERING A REQUEST ON AN EMPLOYEE'S BEHALF**



#### STEP 1

Your employee Brenda Hahn has asked to take a Personal Day and you are going to enter a request on her behalf.

From the Home Page, click on **My Team**, **Time Off**, **Request Time Off** 

HOME RESOURCES MYSELF MY	y team re	PORTS				Search	1					
Request Time Off 🛛 🗖	12											
Hahn, Brenda Position ID: F70000118	My Team	Filters 👻 Emp	Q 🗸									
Job Title: CUSSRVC - Customer Service	00 S	🚍 🤤 🚭 Sunday, March 8 - Saturday, March 14										
Home Department: 012000 - Customer		Sunday	Monday	Tuesday	Wednesday	Thursday	Friday					
Service		8	9	10	11	12	13					
Status: Active	East, Donald											
Select the employee and request date on the calendar, then click Request Time Off.	Evers, Thomas											
Balances As Of: 3/13/2015 🛗 C 🕄	Fager, Charles											
Time Off Policy         Balance           Personal         120.00 hours           Sickft         40.00 hours	Hahn,[Stenda		08:30 AM - 04:30									
Vacation 160.00 hours												
Jury Duty	Johnson, Kenneth											
			09:00 AM - 05:00									

## STEP 2

On the time off calendar, the current day is highlighted in **RED**.

Click on Brenda Hahn's name. Here you can view Brenda's personal time balance to ensure she has enough hours for this request.



The **start** and **end dates** are populated automatically, but you can change the dates if necessary.

The **Amount** and **Start Time** is also populated automatically because

#### **STEP 4**

In the **Time Off Policy field** select the reason for Brenda's request, by clicking on the drop-down box. Then click **Submit**. You will get a message that your request was submitted successfully.

Request Time Off 🛛 🗖 🖉											
Hahn, Brenda Position ID: F70000118	My Team - F	My Team ▼ Filters ▼ Employees Per Page 10									
Job Title: CUSSRVC - Customer Service	🗀 😋 🕑 Sunday, March 8 - Saturday, March 14										
Home Department: 012000 - Customer		Sunday	Monday	Tuesday	Wednesday	Thursday	Friday				
Service		8	9	10	11	12	13				
Status: Active	East, Donald										
Select the employee and request date on the calendar, then click Request Time Off.	Evers, Thomas										
Balances As Of: 3/13/2015 🛗 C 🕐	Fager, Charles										
Time Off Policy Balance			08:30 AM - 04:30	Approved 7hrs.							
Personal 113.00 hours	Hahn, Brenda										
Sickft 40.00 hours											
Vacation 160.00 hours											
Jury Duty	Johnson, Kenneth										
	Macgill, Mary		09:00 AM - 05:00								

Brenda's personal day off is displayed with a status of **Approved** on the Calendar, and her **Personal Time Balance** has been automatically updated.

# **DELEGATING TIME OFF APPROVALS**

RCES MYSELF	MY TEAM PEOPLE PRO	CESS REPORTS SETUP
Devices Inc Taylor Devices Inc	> My Team Employment Time Off Personal Information Time 2 Attendence	Delegated Activities Team Calendar
inks	SWITCH TO EXPA	ANDED MENU

# Click on My Team / Delegated Activities

	HOME	RESOURCES	MYSELF	MY TEAM	PEOPLE	PROCESS	REPORTS	SETUP		Search		
[	Delegated Activities 🛛 🖍											
	Deleg	ate Delegat	ed From	Delegate o	on Behalf C	)f						
	Add, dele accessibl ADD	ete, or edit delegat le. The person you DELETE	ions of your a are delegatin	ctivities to anot ig to must know	ther person. B v how to perfo	e aware that w rm the tasks yo	hen you delega ou are delegatir	te permission 1g.	is, sensitive information not typ	ically available to the indiv		
-		DELEGATED TO				LENGTH	OF DELEGATIO	NC	DELEGATED BY			
	There ar	e currently no dele	gations define	ed.								

# Click on "Delegate"

HOME	RESOURCES	MYSELF	MY TEAM	PEOPLE	PROCESS	REPORTS	SETUP	Search			
Dele	Delegated Activities 🛛 🖍										
Delegate To			Q Ø								
								CANCEL SAVE V			

Click on the search bar to select the name of the employee you are delegating to.

Click on the bullet next to the person's name you want to delegate your time keeping tasks to.

Click Done.

HOME	RESOURCES	MYSELF	MY TEAM	PEOPLE	PROCESS	REPORTS	SETUP	Search	Q
Dele	gated Ac	tivities	0 🖉						
Delegate To	b thleen		Q Ø						
Lengt	n of Delegatior	Permis	sions						
Start d	ate * /dd/yyyyy 🋗	Indefinite							
End da	te ▪ /dd/yyyy 🛗								
								CANCEL	SAVE V

Enter the **start date** and **end date** for the length of time you want to delegate. Click **"Save".** 

HOME	RESOURCES	MYSELF	MY TEAM	PEOPLE	PROCESS	REPORTS	SETUP		Search		
Deleg	Delegated Activities 🛛 🖍										
Delegate To											
King, Kath	hleen		Q 0								
Length	of Delegation	Permissi	ons								
To set up a a tab, clea Be aware t	To set up a delegation, select the permission or permissions that you want to delegate. To select all of the permissions for a tab, select the Enable check box. To clear all the a tab, clear the Enable check box. When you select an individual permission, the Enable check box is selected. The Delegated To must know how to complete the task you a Be aware that when you delegate permissions, the Delegated To may have access to sensitive information not typically available.										
My Te	am Process	Reports	Header	/Toolbar/Fo	ooter Sei	nsitive Pers	onal Info				
Enab	ble My Team										
Time	& Attendance	ce				• E	mployme	ent			

Length of D	elegation	Permissio	าร						
To set up a dele a tab, clear the l Be aware that w	egation, select Enable check b /hen you deleg	the permission oox. When you jate permission	or permissions that you want to c elect an individual permission, th s, the Delegated To may have ac	lelegate. To sele ne Enable check cess to sensitive	ct all of the permi box is selected. T information not t	ssions for a tab, select the Enable check box. To clear all the he Delegated To must know how to complete the task you a ypically available.			
My Team	Process	Reports	Header/Toolbar/Footer	Sensitive F	ersonal Info				
Enable My	Team								
Time & A	ttendance	,		•	Employme	nt			
C Time	e & Attendance Ictual vs. Scheo Ioliday List	duled			Employment     Time Position Info				
<b>O</b> A	ttendance				Time Off				
O N	Ionthly Schedu	ıle							
O Ir	ndividual Timeo	ard			Time Off				
<b>O</b> G	roup Timecard	i			Rec	juest Time Off			
O 🗌 T	imecard Excep	tions			<ul> <li>Tim</li> </ul>	e Off Balances			
<b>o</b> S	chedules				✓ List	Of Requests			
О Т	otals Summary	r			✓ Rec	uest Carryover			
0 0	uick Charge								

Check the **Time Off Box**. This will allow the person you delegated to assume your duties of Time Off Approvals in your absence.

Click on **"Permissions"**.

"Click the **Save** button at the bottom of the page".

# TIME OFF POLICY OPTIONS

# **STAFF (Hourly Employees):**

- **Personal / Sick:** Available in quarter hour increments.
- Vacation: Available in quarter hour increments; please provide 2 weeks-notice for extended periods of a week or more.

Note: Vacation is accrued at the end of each pay period and becomes available to use at the beginning of the next pay period.

## **ADMINISTRATION (Salaried Employees):**

• Vacation: Please provide 2 weeks-notice for extended periods of a week or more. Vacation accruals are calculated monthly and become available on the first of each month.

## **TEMPORARY EMPLOYEES:**

Individuals who are working at Daemen through an employment agency will not be set up in the ADP time off system.

# OTHER TYPES OF PAID TIME OFF:

Jury Duty, Military Leave and Bereavement Requests must be submitted on paper Time Off Request Form along with appropriate documentation for the leave. The <u>Employee Time Off Request Form</u> is available on the Daemen Website - <u>https://www.daemen.edu/about/working-daemen/employee-forms</u>

**NOTE:** You cannot request vacation, personal/sick unless you have it available in your accruals.