



eSTART

Managing Leave

Course Guide for Managers

May 2014

General Information About This Manual

This manual is designed to provide State employees with an overview of the eSTART Time and Attendance System. This manual provides basic procedures; however, you may need to seek clarification on specific agency procedures or rules from your agency personnel manager or supervisor.

Nothing in this handbook should be construed to amend any laws, regulations, policies or procedures established by the State of Alabama or specifically the Alabama State Personnel Department.

Certain procedures contained within this manual are subject to change or revision without prior notice. Employees will be notified as soon as possible when changes or revisions occur.

All leave accruals and usages in eSTART are estimates and/or projections that are based on the concept that all employees earn leave and have leave to use. These estimates and projections may not be accurate.

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Core Leave Concepts

Importance

Purpose

It is important that you consistently and accurately administer State of Alabama's leave policy rules. To make this happen, you need to manage employees' paid and unpaid leave time in an efficient and timely manner. The Leave application supports your ability to perform leave management tasks as you open and maintain leave cases, send leave documents, and allocate and track the amount of leave an employee takes.

eSTART Leave:

- Automates the process of administering leave policies.
- Helps State of Alabama achieve compliance with required federal, state, and local mandates.

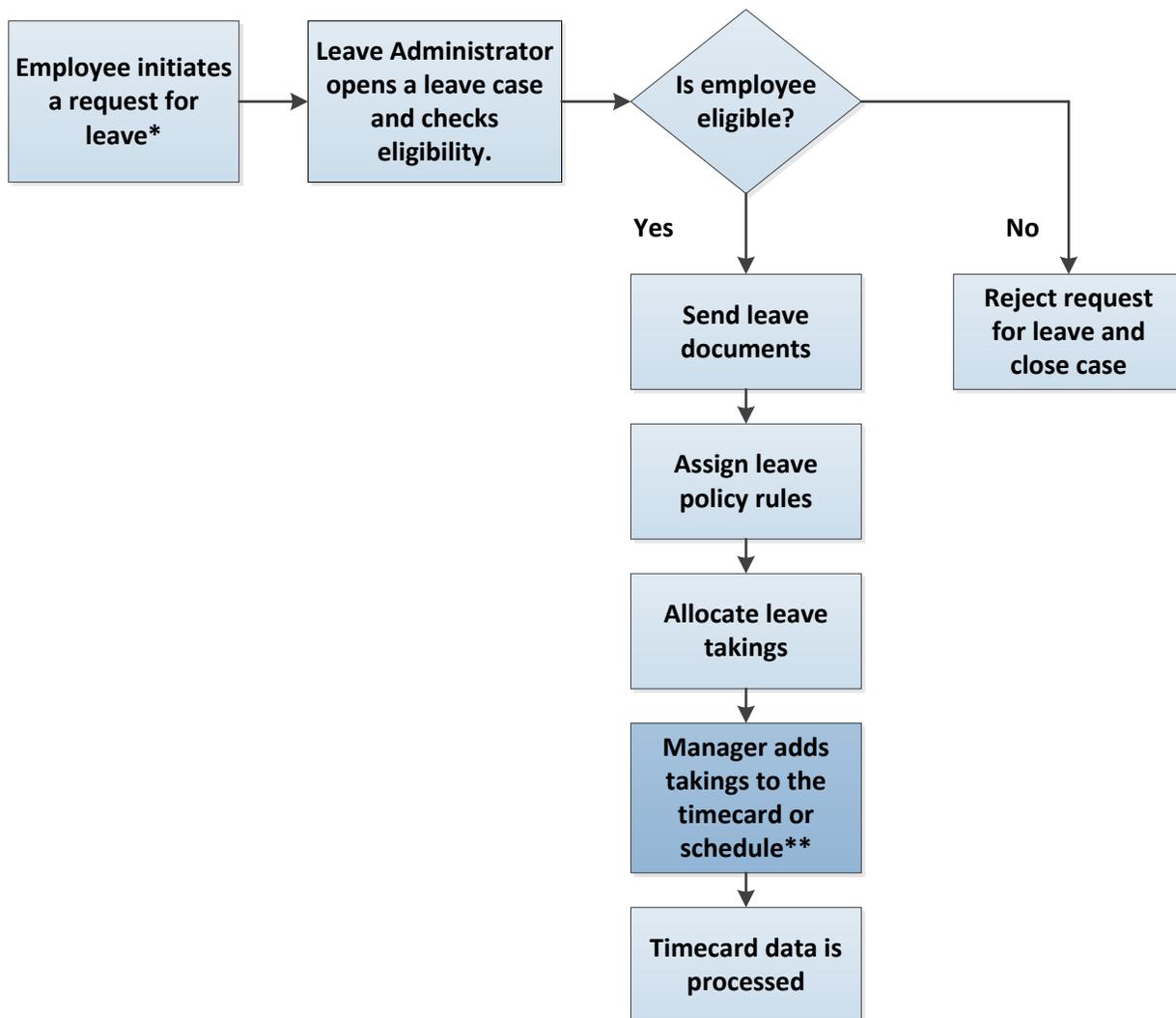


The Leave Process

Purpose

The Leave process automates the administering and tracking of paid and unpaid leave policies. Managers can easily track both continuous and intermittent leave, and add intermittent leave time against an employee's open leave case. In addition to centralizing administration of leave policies throughout State of Alabama, employees benefit from the consistent application of leave policies to individual leave cases.

The following illustration shows the high-level process for administering leave cases.





Roles and Responsibilities

Purpose

Each employee and manager has responsibilities that are important in the leave process. Each person's role determines his or her responsibilities, and the tasks that he or she performs in the application.

Common Employee tasks

On an as-needed basis, employees perform the following task:

- Submit leave requests.
- Provide required leave documentation.
- Submit requests for additional leave or cancel request, as needed.

Common Manager tasks

On a daily or as needed basis, department managers perform the following tasks:

- Monitor leave events through leave views.
- Enter hours for employees' intermittent leave cases.

On a pay period or as-needed basis, managers perform the following task:

- Run leave reports.

Common Leave Administrator Tasks

On a pay-period or as-needed basis, typical Leave Administrator tasks include:

- Determine eligibility and open leave cases.
- Administer open leave cases, including documentation.
- Run leave reports.



Managing Leave

Exploring Leave Tools in eSTART

Purpose

The navigator is your starting point for creating and maintaining your employees' time and leave information. There are two key tools available in the Related Items pane that help you to perform common leave tasks, such as entering your employees' leave takings and monitoring leave cases.

Key Leave Tools

The screenshot shows the eSTART Manager Workspace interface. At the top, it displays 'eSTART-Train State of Alabama', 'JohnA Manager1 Sign Out', and 'Workspaces'. The main area is titled 'Manager Workspace' and shows an 'Exceptions' table for the 'Current Pay Period' with filters for 'AL-All Home and Trans'. The table lists employees and their exception counts. A sidebar on the right contains a 'Related Items' pane with several options, two of which are highlighted with red boxes: 'My Views' and 'Reports Manager'.

Name	Missed Punch	Punch Exceptions	Lunch Exceptions	Unexcused / Unsched	Holiday Skipped	Total
Manager1, JuniorA				1	1	2
Punch1, PennyA				1	1	2
Exempt1, EdwardA						0
Newby1, NeilA						0
Stamp1, SandyA						0
Total:						4

Navigator area	Description
My Views	Access the My Views workspace in eSTART to view Leave Hours View and Leave Cases View. You can also use this workspace to access employee timecards for purposes of entering intermittent leave time for an employee.
Reports Manager	Access the Reports Manager workspace in eSTART to run and view leave reports, such as the Leave Hours Detail and Leave Hours Summary reports.



Accessing Leave Views

Purpose

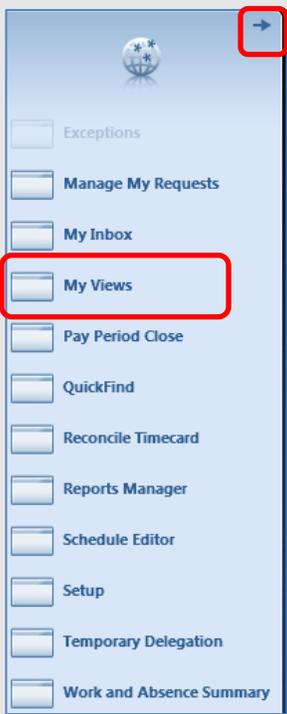
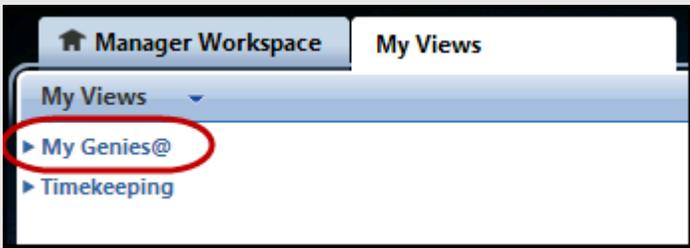
eSTART includes the following leave Views:

- Leave Cases View
- Leave Hours View

You can use either of these Views as a starting point for viewing and monitoring employee leave cases. Leave Views are accessed from the same workspace that timekeeper views are accessed.

Exercise

You want to access the Leave Views.

Steps	
1	<p>In the Related Items pane, click the arrow to expand the pane, and select My Views.</p> 
2	<p>Click the arrow next to My Genies to expand the category.</p> 



Steps		
3	Click the Leave Hours View you wish to view.	 <p>The screenshot shows the 'Manager Workspace' interface with a 'My Views' dropdown menu open. The menu lists several view options under the heading 'My Genies@'. The 'Leave Hours View' option is highlighted with a red circle. Other options include 'Accrual Detail Balance View', 'Accrual Reporting Period View', 'Custom Field Reporting View', 'Employee Holiday Credit View', 'Employee Hours View', 'Employee Information View', 'Leave Cases View', 'On Premises View', 'Pay Period Close View', 'QuickFind', and 'Reconcile Timecard View'. A 'Timekeeping' section is also visible at the bottom of the menu.</p>
4	From the Show drop-down list, select All Home and Transferred-In .	
5	From the Time Period drop-down list, select Next Pay Period .	



Using the Tools in Leave Views

Quick links are located at the top of the View, and let you quickly access editors and tools that display information specific to one or more employees. For example, select an employee and click the Timecard quick link to access his or her timecard for purposes of adding intermittent leave time; or select multiple employees and click the Reports quick link to generate a report for only those selected employees.

Leave located on the Action Bar, is also available and will be used to view or add new leave cases.

LEAVE HOURS VIEW				
Last Refreshed: 2:03PM				Show
				Time
Actions ▾	Amount ▾	Schedule ▾	Leave ▾	
Name	1/	Leave Case Status	Leave Case Code	Leave Start Date
Exempt1, EdwardB				
Manager1, JuniorB				
Newby1, NeilB				
Punch1, PennyB		Open	SLFILL	3/01/2014
Stamp1, SandyB		Open	FPARNT	1/01/2014



Tip

There are various ways to select employees:

- Use the **Ctrl** key to select more than one employee not listed next to each other.
- Use the **Shift** key to select all employees listed between two employees, including the two employees.
- Click and drag the mouse to select employees.



Note

These tools are common to both the Leave Hours View and the Leave Case View.



The **Show** field lets you select and display a specific group of employees. The default setting for the Show field when you log on is **All Home and Transferred In**, which displays all employees that report to you. You can use the Show field to further refine your selection to include employees in a specific group, such as only those employees who are working in a particular area.

The **Time Period** field lets you define the timeframe for which you want to view information. The default setting for the Time Period field when you open the View is **Current Pay Period**. You can select a predefined date period option, such as Previous Pay Period or Yesterday. Alternatively, you can define a specific date or range of dates. The time period you select determines the leave information displayed on the page.

Name	Leave Case Status	Leave Case Code	Leave Start Date	Leave End Date	Committed Paid Leave Time	Committed Unpaid Leave Time
Exempt1, EdwardB						
Manager1, JuniorB						
Newby1, NeilB						
Punch1, PennyB	Open	SLFILL	3/01/2014	3/11/2014	40:00	40:00
Stamp1, SandyB	Open	FPARNT	1/01/2014		8:00	8:00



Requesting Leave for an Employee

Purpose

Occasionally, it is necessary to initiate a leave request for an employee who is unable to do so, for example, when an employee is already on sick leave.

The Leave Case Editor is a tool in both Leave Views that allows you to electronically complete a request for leave on the employee's behalf. Once you submit the leave request, it is electronically sent to the Leave Administrator who will check the employee's eligibility and process the proper documentation.

The Leave Case Editor can be accessed through a Quick Link in either the Leave Hours View or the Leave Cases View as illustrated below.

Manager Workspace | My Views

My Views

Back to My Views

Timecard | Schedule | People | Reports | **Leave Cases**

LEAVE HOURS VIEW

Last Refreshed: 2:03PM

Show: AL-All Home and Transferred-In [Edit]

Time Period: Next Pay Period [Refresh]

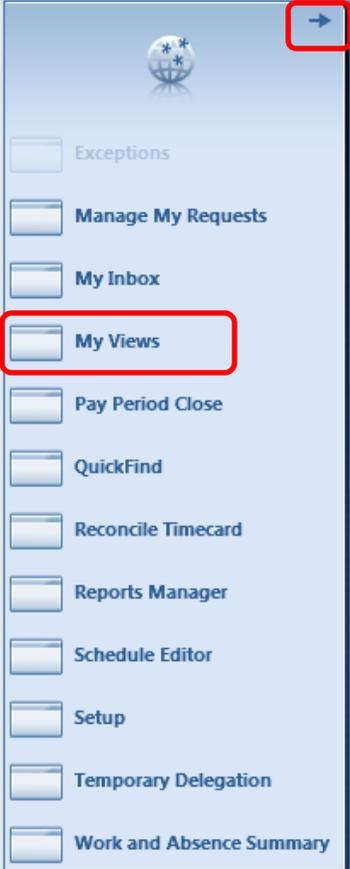
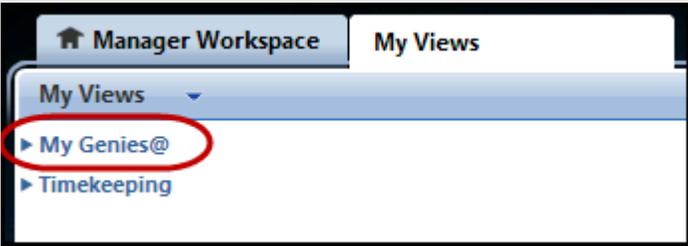
Actions | Amount | Schedule | Leave

Name	Leave Case Status	Leave Case Code	Leave Start Date	Leave End Date	Committed Paid Leave Time	Committed Unpaid Leave Time
Exempt1, EdwardB						
Manager1, JuniorB						
Newby1, NeilB						
Punch1, PennyB	Open	SLFILL	3/01/2014	3/11/2014	40:00	40:00
Stamp1, SandyB	Open	FPARNT	1/01/2014		8:00	8:00



Exercise

Yesterday, employee, Edward Exempt, called to tell you that he will be unable to come to work due to an injury he sustained while working in his yard. He is unable to work and does not know when he will return. Edward has asked you to initiate a leave of absence request. You want to access Edward Exempt's record and initiate a leave request on his behalf.

Steps		
1	In the Related Items pane, click the arrow to expand the pane, and select My Views .	 A screenshot of a software interface's 'Related Items' pane. The pane is a vertical list of menu items, each with a folder icon to its left. The items are: Exceptions, Manage My Requests, My Inbox, My Views, Pay Period Close, QuickFind, Reconcile Timecard, Reports Manager, Schedule Editor, Setup, Temporary Delegation, and Work and Absence Summary. The 'My Views' item is highlighted with a red rectangular box. A small blue arrow icon is located in the top right corner of the pane, also highlighted with a red rectangular box.
2	Click the arrow next to My Genies to expand the category.	 A screenshot of the expanded 'My Views' menu. The menu is open, showing a list of sub-items. The sub-items are: My Views (with a dropdown arrow), My Genies@ (with a right-pointing arrow), and Timekeeping (with a right-pointing arrow). The 'My Genies@' item is highlighted with a red oval.



Steps

3 Select **Leave Hours View**.

Note: This process may also be started from the **Leave Cases View**.

The screenshot shows the 'Manager Workspace' interface with a 'My Views' dropdown menu open. The menu lists several options, with 'Leave Hours View' circled in red. Other options include 'Accrual Detail Balance View', 'Accrual Reporting Period View', 'Custom Field Reporting View', 'Employee Holiday Credit View', 'Employee Hours View', 'Employee Information View', 'Leave Cases View', 'On Premises View', 'Pay Period Close View', 'QuickFind', and 'Reconcile Timecard View'. A 'Timekeeping' section is also visible at the bottom.

4 From the **Show** drop-down list, select **All Home and Transferred-In**.

The screenshot shows two filter fields. The 'Show' field is set to 'AL-All Home and Transferred-In' with an 'Edit' button next to it. The 'Time Period' field is set to 'Current Pay Period' with a 'Refresh' button next to it.

5 From the **Time Period** drop-down list, select **Current Pay Period**.

6 Select **Edward Exempt** and then click **Leave Cases**.

Note: You may also select the **Leave** drop-down. Then select **New Leave Case**.

The screenshot shows the 'LEAVE HOURS VIEW' interface. At the top, there are navigation tabs: 'Timecard', 'Schedule', 'People', 'Reports', and 'Leave Cases', with 'Leave Cases' circled in red. Below the tabs, the title 'LEAVE HOURS VIEW' is displayed, followed by 'Last Refreshed: 1:51PM'. A table is shown with columns: 'Actions', 'Punch', 'Amount', 'Schedule', and 'Leave'. The 'Leave' column has a dropdown menu circled in red. The table contains one row for 'Exempt1, EdwardA' (circled in red) and another row for 'Manager1, JuniorA'. The table headers are: Name, Leave Case Status, and Leave Case Code.

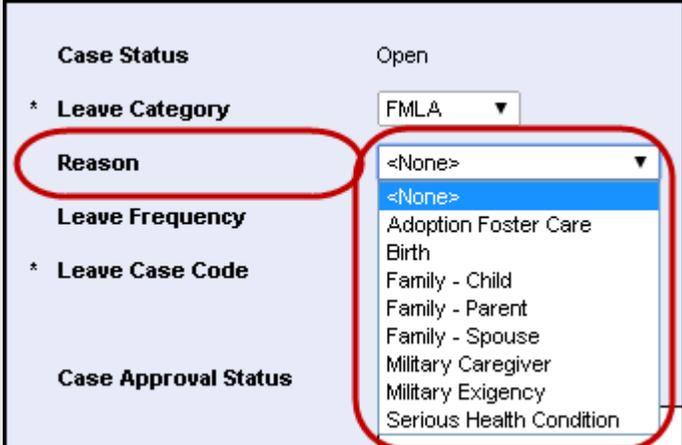
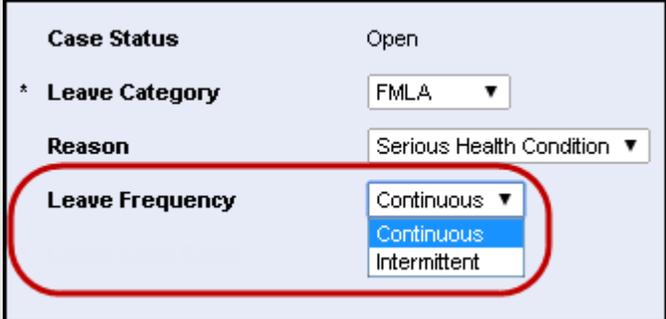
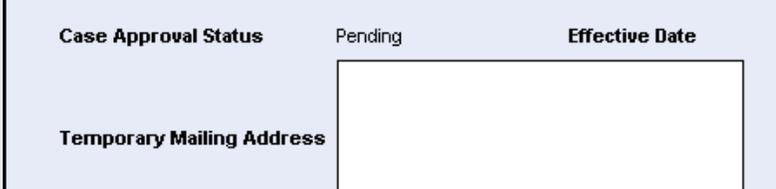
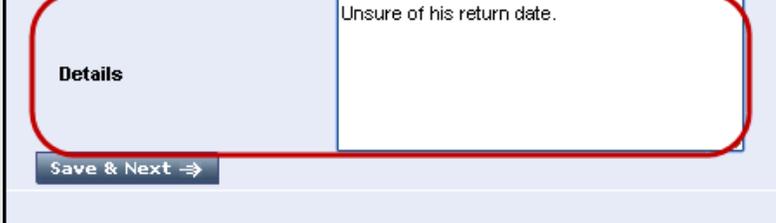


Steps

7	From the Leave Cases workspace, click New .	
8	In the Leave Start Date field, enter the date the employee will go on leave or select a date using the calendar icon. For this exercise, today's date is the default. Leave this date selected.	
9	In the Initial Leave Request Date , enter the date the employee requested leave or select a date using the calendar icon. For this exercise, today's date is the default. Leave this date selected.	
10	In the Leave Category field, accept the default value of FMLA .	

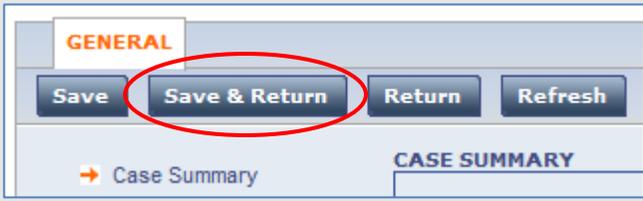
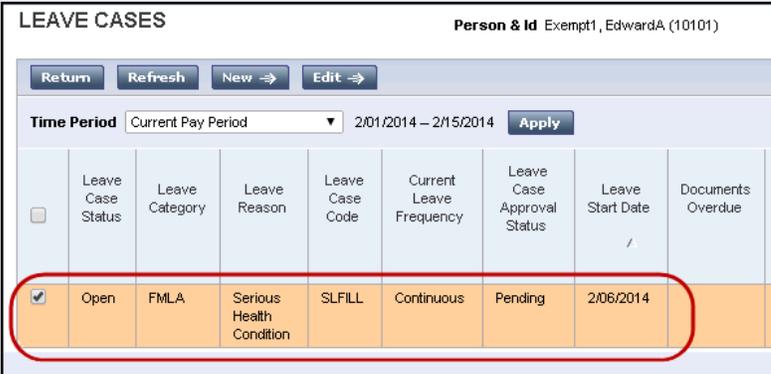


Steps

<p>11 From the Leave Reason drop-down list, select the appropriate leave reason.</p> <p>For this exercise, select Serious Health Condition.</p> <p>Note: After selecting a reason, the Leave Case Code is automatically populated.</p>	
<p>12 From the Leave Frequency drop-down list, select the appropriate frequency of the employee's leave.</p> <p>For this exercise, select Continuous.</p>	
<p>13 In the Effective Date field, enter the date the leave <i>frequency</i> becomes effective or select a date using the calendar icon.</p> <p>Leave today's date selected.</p>	
<p>14 In the Temporary Mailing Address field, enter a mailing address, if necessary.</p> <p>Note: This is an optional field that may be used should the employee need to leave an alternate address.</p>	
<p>15 (Optional) in the Details field, enter any other details that may be relevant to the leave request.</p>	



Steps

16	Click Save & Return to close the leave request and return to the Leave Cases workspace.																			
17	Confirm that the leave information is correct and that the leave request was successfully submitted by reviewing the information in the Leave Cases workspace.	 <table border="1"><thead><tr><th></th><th>Leave Case Status</th><th>Leave Category</th><th>Leave Reason</th><th>Leave Case Code</th><th>Current Leave Frequency</th><th>Leave Case Approval Status</th><th>Leave Start Date</th><th>Documents Overdue</th></tr></thead><tbody><tr><td><input checked="" type="checkbox"/></td><td>Open</td><td>FMLA</td><td>Serious Health Condition</td><td>SLFILL</td><td>Continuous</td><td>Pending</td><td>2/06/2014</td><td></td></tr></tbody></table>		Leave Case Status	Leave Category	Leave Reason	Leave Case Code	Current Leave Frequency	Leave Case Approval Status	Leave Start Date	Documents Overdue	<input checked="" type="checkbox"/>	Open	FMLA	Serious Health Condition	SLFILL	Continuous	Pending	2/06/2014	
	Leave Case Status	Leave Category	Leave Reason	Leave Case Code	Current Leave Frequency	Leave Case Approval Status	Leave Start Date	Documents Overdue												
<input checked="" type="checkbox"/>	Open	FMLA	Serious Health Condition	SLFILL	Continuous	Pending	2/06/2014													

 **Note**
Initially the manager may not have all the information needed to open the leave case. Additional information may need to be added at a later date.



Exploring the Leave Hours View

Purpose

The Leave Hours View is especially useful for viewing total leave hours. It also provides other information about each leave case in eSTART, including:

- Leave Case Status
- Last date of committed paid and unpaid leave time
- Leave end date (if one is provided)

Key Information in the Leave Hours View

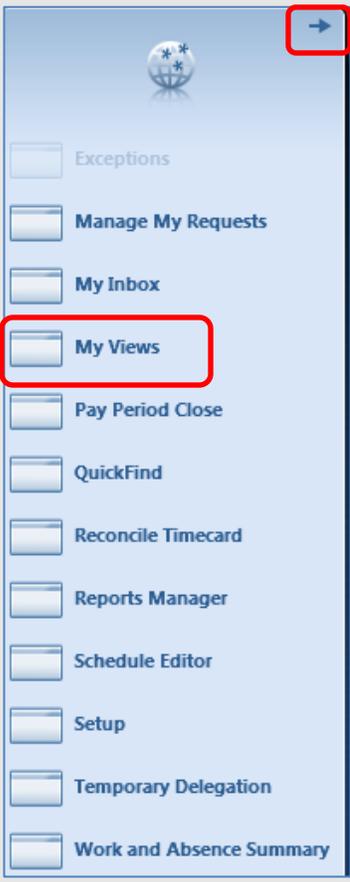
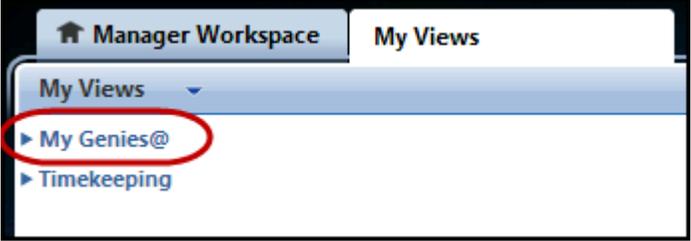
Name	Leave Case Status	Leave Case Code	Leave Start Date	Leave End Date	Committed Paid Leave Time	Committed Unpaid Leave Time	Last Date/Committed Paid Leave Time	Last Date/Committed Unpaid Leave Time	Total Paid Leave Takings	Total Unpaid Leave Takings
Exempt1, EdwardA										
Manager1, JuniorA										
Newby1, NelA										
Punch1, PennyA	Open	SLFILL	3/01/2014	3/11/2014	40:00	40:00	3/11/2014	3/11/2014	40:00	40:00
Stamp1, SandyA	Open	FPARNT	1/01/2014		8:00	8:00	3/04/2014	3/04/2014	8:00	8:00

Column	Description
Leave Case Status	Indicates the status of the leave case for the specified time period, such as Open, Closed, Pending, Submitted, or Retracted.
Leave Case Code	Type of leave, such as Self or Family.
Leave Start Date	This is the first day that the employee takes leave.
Leave End Date	This is the employee's expected return date.
Committed Paid/Unpaid Leave Time	The Committed Paid Leave Time and Committed Unpaid Leave Time columns show the amount of paid and unpaid time that has been committed to the schedule or timecard in the selected time period.
Last Date/Committed Paid/Unpaid Leave Time	The Last Date/Committed Paid Leave Time and Last Date/Committed Unpaid Leave Time columns show the date of the last committed paid and unpaid amounts.
Total Paid/Unpaid Leave Takings	The Total Paid Leave Takings and Total Unpaid Leave Takings columns show the total amount of paid and unpaid leave that an employee has taken.



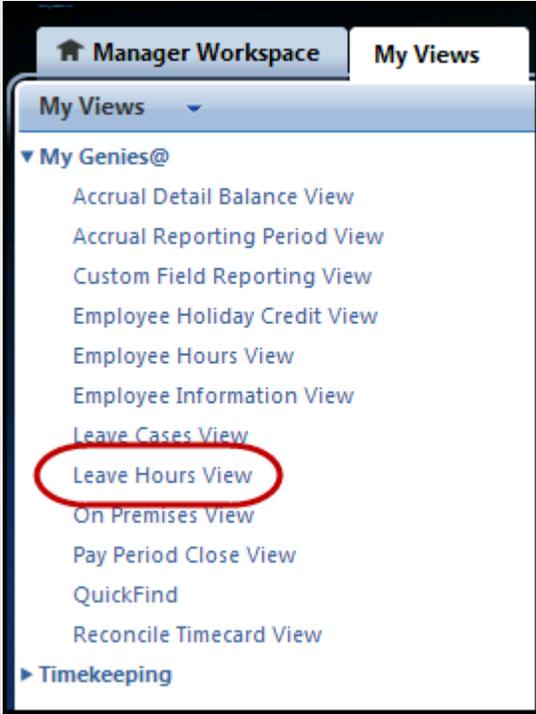
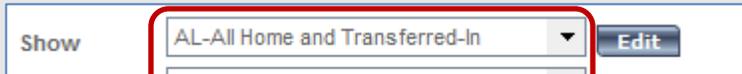
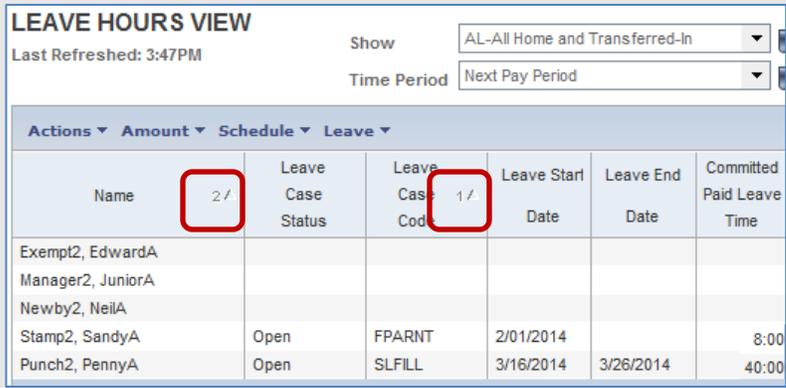
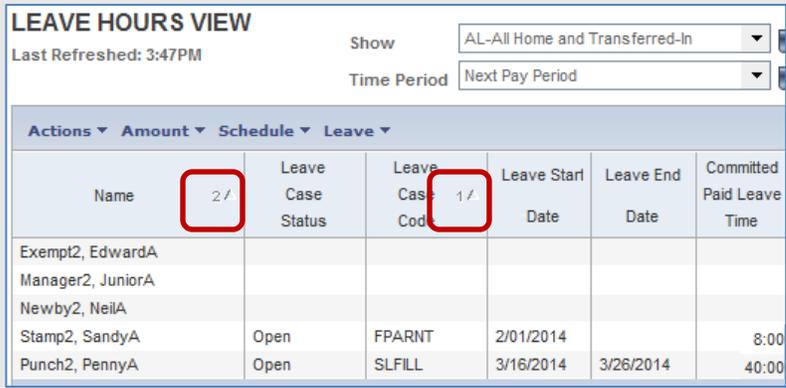
Exercise

You want to know when employee Penny Punch will return from maternity leave and how much leave time has been committed to Sandy Stamp's timecard.

Steps	
<p>1 In the Related Items pane, click the arrow to expand the pane, and select My Views.</p>	 <p>The screenshot shows a vertical list of menu items in a light blue pane. At the top right of the pane is a small icon of a globe with three stars and a right-pointing arrow, which is highlighted with a red box. Below this are several menu items, each with a folder icon to its left. The item 'My Views' is highlighted with a red box. The other items are: Exceptions, Manage My Requests, My Inbox, Pay Period Close, QuickFind, Reconcile Timecard, Reports Manager, Schedule Editor, Setup, Temporary Delegation, and Work and Absence Summary.</p>
<p>2 Click the arrow next to My Genies to expand the category.</p>	 <p>The screenshot shows a dropdown menu titled 'My Views' open. The menu has a header bar with a home icon and the text 'Manager Workspace' and 'My Views'. Below the header, the menu items are 'My Views' (with a dropdown arrow), 'My Genies@' (circled in red), and 'Timekeeping'.</p>



Steps

3	Click the Leave Hours View .	
4	From the Show drop-down list, select All Home and Transferred-In .	
5	From the Time Period drop-down list, select Next Pay Period .	
6	(Optional). Click up to two column headers to sort the data. <ul style="list-style-type: none"> • A down arrow shows the sort as descending; an up arrow shows the sort as ascending. • A number displays in each column heading next to the up or down arrow to identify the primary sorting column. 	
7	<ul style="list-style-type: none"> • Find Penny Punch and view her Leave End Date column. • Find Sandy Stamp and view her Committed Paid Leave Time column. 	



Exploring the Leave Cases View

Purpose

The Leave Cases View is especially useful for viewing leave reasons and leave frequency. It also provides other information about each leave case in eSTART including:

- Leave case status
- Leave category
- Initial leave request date

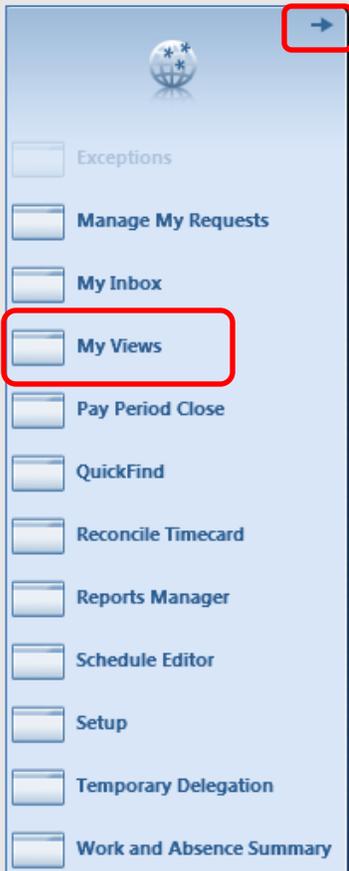
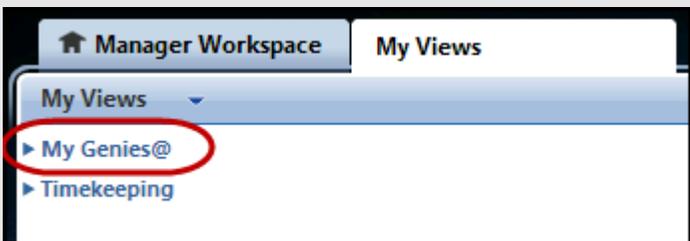
Name	Leave Case Status	Leave Category	Leave Reason	Leave Case Code	Leave Frequency	Leave Case Approval Status	Initial Leave Request Date	Leave Start Date	Documents Overdue	New Leave Requests	Leave End Date
Exempt1, EdwardA Manager1, JuniorA Newby1, NeilA											
Punch1, PennyA	Open	FMLA	Serious Health Condition	SLFILL	Continuous	Approved	3/01/2014	3/01/2014			3/11/2014
Stamp1, SandyA	Open	FMLA	Family - Parent	FPARNT	Intermittent	Approved	1/01/2014	1/01/2014			

Column	Description
Leave Case Status	Status of a leave case, such as Open, Closed, or Submitted.
Leave Category	Type of leave, such as Self or Family.
Leave Reason	Indicates a more specific leave such as serious illness or birth.
Leave Case Code	Type of leave, such as Self or Family.
Leave Frequency	Indicates whether the employee is on continuous or intermittent leave.
Leave Case Approval Status	Indicates whether a leave request is approved, pending or denied.
Initial Leave Request Date	Date the leave request was made.
Leave Start Date	Date leave starts for an employee.
Documents Overdue	A check in this column indicates that a document is overdue.
New Leave Requests	A check in this column indicates additional time requested on an existing leave case.
Leave End Date	The expected date on which an employee returns to work.



Exercise

You want to review the status and frequency of Sandy Stamp's leave case. Access the Leave Cases View to review Sandy's leave information.

Steps	
1	In the Related Items pane, click the arrow to expand the pane, and select My Views .
	
2	Click the arrow next to My Genies to expand the category.
	



Steps		
3	Click the Leave Cases View .	
4	From the Show drop-down list, select All Home and Transferred-In .	
5	From the Time Period drop-down list, select Current Pay Period .	
6	(Optional). Click up to two column headers to sort the data. <ul style="list-style-type: none"> • A down arrow shows the sort as descending; an up arrow shows the sort as ascending. • A number displays in each column heading next to the up or down arrow to identify primary sorting column. 	
7	Review the leave information for Sandy Stamp .	



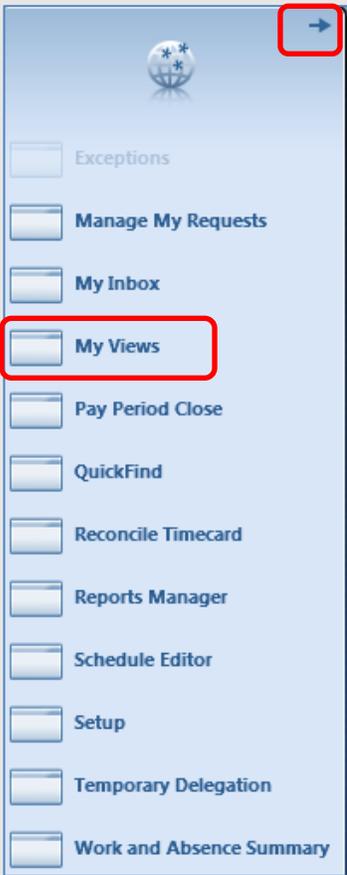
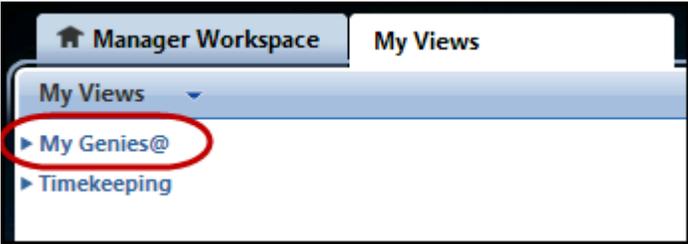
Reviewing Leave Time in a Timecard

Purpose

After leave has been approved and committed for an employee by your Leave Administrator, you can view those leave hours in your employee's timecard. Leave time displays differently than other pay codes in the timecard. Leave Time displays in black text with the prefix "LV" and is not editable.

Exercise

Penny Punch is out on leave. You want to review her timecard to confirm that the leave hours are accurate.

Steps	
1	<p>In the Related Items pane, click the arrow to expand the pane, and select My Views.</p> 
2	<p>Click My Genies to expand it.</p> 



Steps

<p>3</p>	<p>Click the Leave View you wish to view.</p>																																																	
<p>4</p>	<p>Select AL-All Home and Transferred-In from the Show drop-down.</p> <p>Select Next Pay Period selected in the Time Period drop-down.</p>																																																	
<p>5</p>	<p>Select Penny Punch then click the Timecard link.</p>	<table border="1"> <thead> <tr> <th>Name</th> <th>1 /</th> <th>Leave Case Status</th> <th>Leave Case Code</th> <th>Leave Start Date</th> <th>Leave End Date</th> <th>Committed Paid Leave Time</th> <th>Committed Unpaid Leave Time</th> </tr> </thead> <tbody> <tr> <td>Exempt1, EdwardA</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Manager1, JuniorA</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Newby1, NelA</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Punch1, PennyA</td> <td></td> <td>Open</td> <td>SLFILL</td> <td>3/16/2014</td> <td>3/26/2014</td> <td>40.00</td> <td>40.00</td> </tr> <tr> <td>Stamp1, SandyA</td> <td></td> <td>Open</td> <td>FPARNT</td> <td>2/01/2014</td> <td></td> <td>8.00</td> <td>8.00</td> </tr> </tbody> </table>	Name	1 /	Leave Case Status	Leave Case Code	Leave Start Date	Leave End Date	Committed Paid Leave Time	Committed Unpaid Leave Time	Exempt1, EdwardA								Manager1, JuniorA								Newby1, NelA								Punch1, PennyA		Open	SLFILL	3/16/2014	3/26/2014	40.00	40.00	Stamp1, SandyA		Open	FPARNT	2/01/2014		8.00	8.00
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Steps

- 5 Review the leave takings in the timecard for the selected time period.

LV – Tracking always displays as an entry on the timecard for tracking purposes.

 The secondary entry(s) describe the type of leave used.

Totals and Schedule provides a summary for the time period selected.

Timecard | Schedule | People | Reports | Leave Cases

TIMECARD

Loaded: 12:21PM Name & ID
Time Peri

Save | Actions ▾ | Punch ▾ | Amount | Accruals ▾ | Comment ▾ | A

	Date	Pay Code	Amount
X	Sun 3/16		
	Mon 3/17	LV - FMLA TRACKING	8:00
	Mon 3/17	LV - SICK LEAVE TAKEN	8:00
	Tue 3/18	LV - FMLA TRACKING	8:00
	Tue 3/18	LV - ANNUAL LEAVE TAKEN	3:00
	Tue 3/18	LV - SICK LEAVE TAKEN	5:00
	Wed 3/19	LV - FMLA TRACKING	8:00
	Wed 3/19	LV - ANNUAL LEAVE TAKEN	8:00
	Thu 3/20	LV - FMLA TRACKING	8:00
	Thu 3/20	LV - ANNUAL LEAVE TAKEN	2:00
	Thu 3/20	LV - LEAVE WITHOUT PAY	6:00
	Fri 3/21	LV - FMLA TRACKING	8:00
	Fri 3/21	LV - LEAVE WITHOUT PAY	8:00
X	Sat 3/22		
X	Sun 3/23		
▼	Mon 3/24		

TOTALS & SCHEDULE | LEAVE REPORTING PERIOD VIEW | AUDITS

All ▾

Pay Code	Amount
LV - LEAVE WITHOUT PAY	14:00
LV - FMLA TRACKING	40:00
LV - SICK LEAVE TAKEN	13:00
LV - ANNUAL LEAVE TAKEN	13:00



Note

Contact your Leave Administrator to discuss necessary leave modifications to an employee's leave hours.



Committing Intermittent Leave Time to a Timecard

Purpose

The Leave Case Editor is a tool available in the employee's timecard that allows you to enter intermittent leave time for an open leave case, such as when an employee has ongoing doctor's appointments or physical therapy. The Leave Case Editor lets you view, add, and modify leave time that was previously entered using the Leave Case Editor.

Exercise

Sandy Stamp has an open leave case. She requested four hours of leave time for Wednesday of the next pay period to take her mother to physical therapy. You want to use the Leave Case Editor to enter and commit the intermittent leave time to her timecard.

Steps																																											
<p>1 From Related Items>My Views >My Genies, select either the Leave Cases View or Leave Hours View.</p> <p>Select All Home and Transferred-In from the Show drop down.</p> <p>From the Time Period drop-down list, select Next Pay Period.</p>																																											
<p>2 Select Sandy Stamp and click the Timecard link.</p>	<table border="1"> <thead> <tr> <th>Name</th> <th>Leave Case Status</th> <th>Leave Case Code</th> <th>Leave Start Date</th> <th>Leave End Date</th> <th>Committed Paid Leave Time</th> <th>Committed Unpaid Leave Time</th> </tr> </thead> <tbody> <tr> <td>Stamp1, SandyB</td> <td>Open</td> <td>FPARNT</td> <td>1/01/2014</td> <td></td> <td>8:00</td> <td>8:00</td> </tr> <tr> <td>Bunch1, ReneeB</td> <td>Open</td> <td>SLFILL</td> <td>3/01/2014</td> <td>3/11/2014</td> <td>40:00</td> <td>40:00</td> </tr> <tr> <td>Newby1, NeilB</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Managert, JuniorB</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Exempt1, EdwardB</td> <td>Open</td> <td>SLFILL</td> <td>2/24/2014</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Name	Leave Case Status	Leave Case Code	Leave Start Date	Leave End Date	Committed Paid Leave Time	Committed Unpaid Leave Time	Stamp1, SandyB	Open	FPARNT	1/01/2014		8:00	8:00	Bunch1, ReneeB	Open	SLFILL	3/01/2014	3/11/2014	40:00	40:00	Newby1, NeilB							Managert, JuniorB							Exempt1, EdwardB	Open	SLFILL	2/24/2014			
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<p>3 Select Leave > Edit.</p>	<table border="1"> <thead> <tr> <th>Date</th> <th>Pay Code</th> <th>Amount</th> <th>In</th> </tr> </thead> <tbody> <tr><td>Thu 2/06</td><td></td><td></td><td></td></tr> <tr><td>Fri 2/07</td><td></td><td></td><td></td></tr> <tr><td>Sat 2/08</td><td></td><td></td><td></td></tr> <tr><td>Sun 2/09</td><td></td><td></td><td></td></tr> <tr><td>Mon 2/10</td><td></td><td></td><td></td></tr> <tr><td>Tue 2/11</td><td></td><td></td><td></td></tr> <tr><td>Wed 2/12</td><td></td><td></td><td></td></tr> <tr><td>Thu 2/13</td><td></td><td></td><td></td></tr> </tbody> </table>	Date	Pay Code	Amount	In	Thu 2/06				Fri 2/07				Sat 2/08				Sun 2/09				Mon 2/10				Tue 2/11				Wed 2/12				Thu 2/13									
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Steps																																																																														
<p>4 In the Leave Time Amount column, click the cell for the applicable day(s) and enter 4 leave time hours.</p>	<div data-bbox="669 386 1453 968"> <h3>LEAVE CASE EDITOR</h3> <p>Leave Case FPARNT 12/01/2013 - <None></p> <p>Case Status Open</p> <table border="1"> <thead> <tr> <th>Date</th> <th>Leave Time Amount</th> </tr> </thead> <tbody> <tr><td>Sat 2/01/2014</td><td><input type="text"/></td></tr> <tr><td>Sun 2/02/2014</td><td><input type="text"/></td></tr> <tr><td>Mon 2/03/2014</td><td><input type="text"/></td></tr> <tr><td>Tue 2/04/2014</td><td><input type="text"/></td></tr> <tr><td>Wed 2/05/2014</td><td><input type="text" value="4"/></td></tr> <tr><td>Thu 2/06/2014</td><td><input type="text"/></td></tr> <tr><td>Fri 2/07/2014</td><td><input type="text"/></td></tr> </tbody> </table> <p>Buttons: Save, Save & Close, Refresh, Close</p> </div>	Date	Leave Time Amount	Sat 2/01/2014	<input type="text"/>	Sun 2/02/2014	<input type="text"/>	Mon 2/03/2014	<input type="text"/>	Tue 2/04/2014	<input type="text"/>	Wed 2/05/2014	<input type="text" value="4"/>	Thu 2/06/2014	<input type="text"/>	Fri 2/07/2014	<input type="text"/>																																																													
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<p>5 Click Save & Close.</p>																																																																														
<p>6 The timecard will display.</p> <p>Select Actions > Refresh and confirm that the leave time displays in the timecard.</p>	<div data-bbox="669 1058 1414 1640"> <h3>TIMECARD</h3> <p>Loaded: 4:59PM</p> <table border="1"> <thead> <tr> <th></th> <th>Save</th> <th>Actions</th> <th>Punch</th> <th>Amount</th> <th>Accruals</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>Refresh</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td>Refresh Data</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td>Calculate Totals</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td>E-mail →</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td>Print →</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td>Print Screen →</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td>Wed 2/05</td> <td>LV - FMLA TRACKING</td> <td>4:00</td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td>Wed 2/05</td> <td>LV - SICK LEAVE TAKEN</td> <td>4:00</td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td>Thu 2/06</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td>Fri 2/07</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> </div>		Save	Actions	Punch	Amount	Accruals	Comments			Refresh							Refresh Data							Calculate Totals							E-mail →							Print →							Print Screen →							Wed 2/05	LV - FMLA TRACKING	4:00					Wed 2/05	LV - SICK LEAVE TAKEN	4:00					Thu 2/06							Fri 2/07				
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Note

Contact your Leave Administrator if you are unable to commit the time. The leave takings may not have been projected. Projections are estimates that are based on the assumption that employees accrue and use leave. These projections may be inaccurate.



Generating Leave Reports

Purpose

Employee leave information is available in several different leave reports. You can generate leave reports on a daily, weekly, or pay-period basis, or any time you need information to accomplish your business tasks. For example, you can generate the Leave Hours Detail report to review the types of leave hours for each shift that has been committed to an employee's timecard.

Exercise

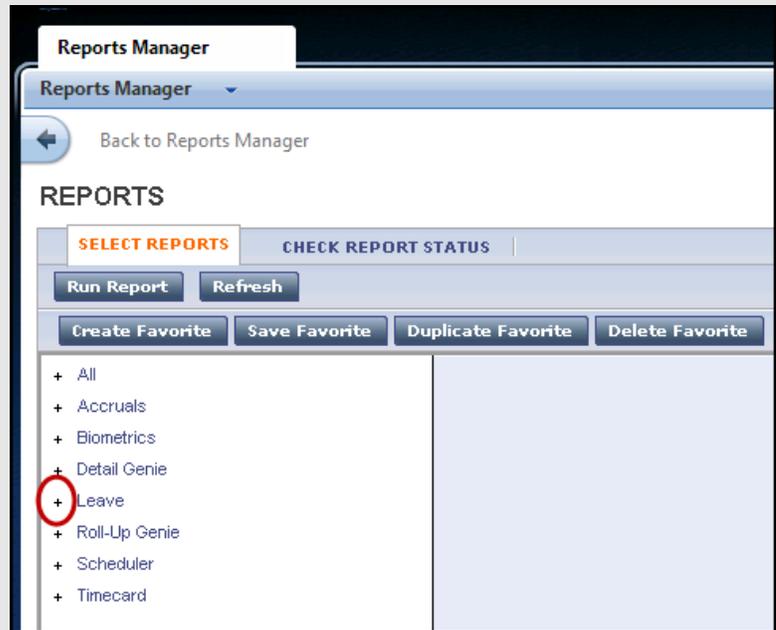
You want to review the leave hours for each employee. Generate the **Leave Hours Detail** report to view this information.

Steps	
1	<p>In the Related Items pane, click the arrow to expand the pane, and select Reports Manager.</p> 

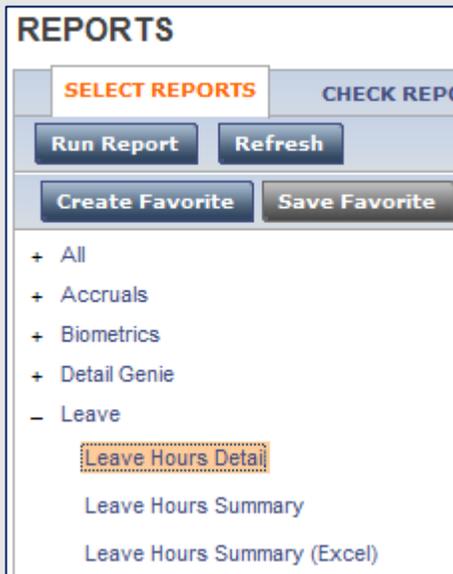


Steps

2 On the **Select Report** tab, click the plus sign (+) next to **Leave** to expand the category.

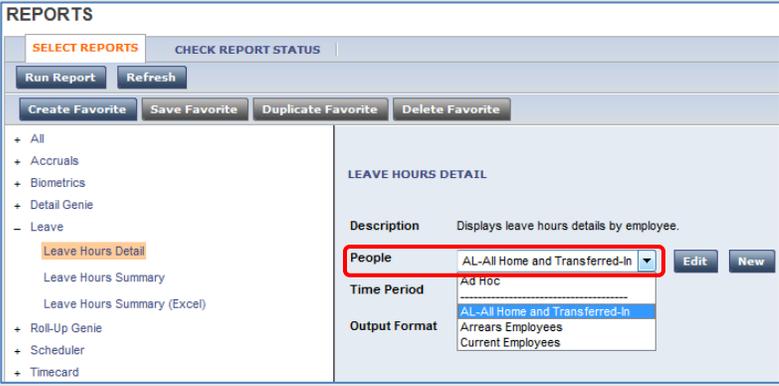
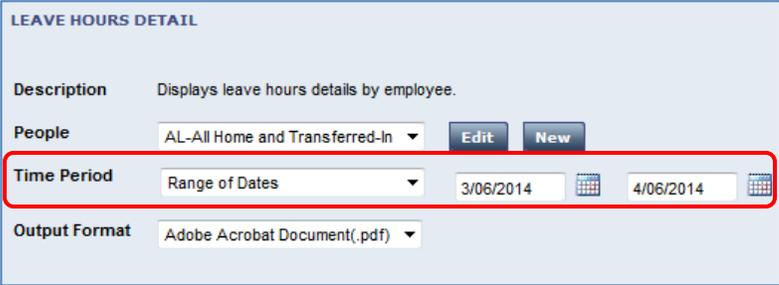


3 Select **Leave Hours Detail** report.



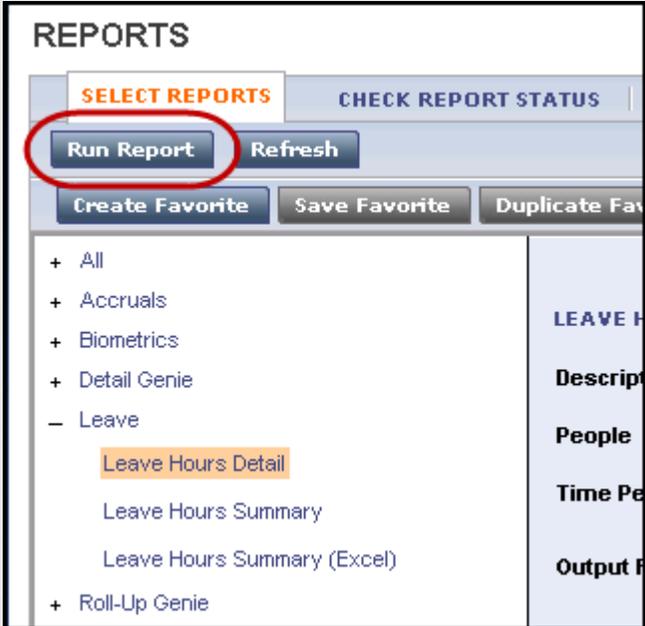
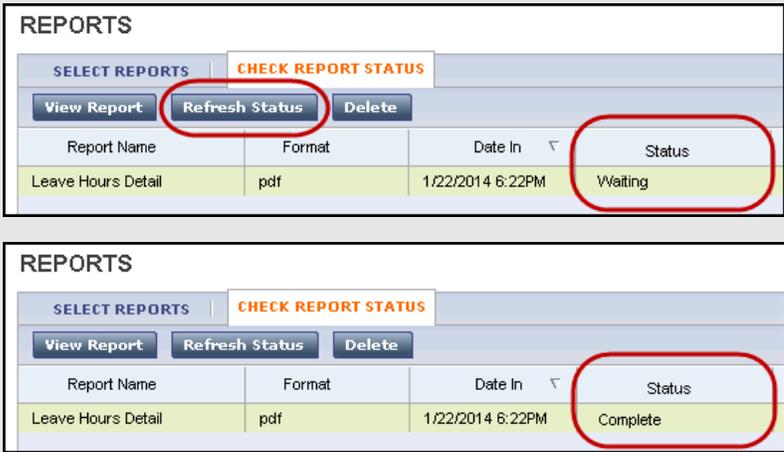


Steps

4	<p>From the People drop-down list, select All Home and Transferred In.</p>	 <p>REPORTS</p> <p>SELECT REPORTS CHECK REPORT STATUS</p> <p>Run Report Refresh</p> <p>Create Favorite Save Favorite Duplicate Favorite Delete Favorite</p> <ul style="list-style-type: none">+ All+ Accruals+ Biometrics+ Detail Genie- Leave<ul style="list-style-type: none">Leave Hours DetailLeave Hours SummaryLeave Hours Summary (Excel)+ Roll-Up Genie+ Scheduler+ Timecard <p>LEAVE HOURS DETAIL</p> <p>Description Displays leave hours details by employee.</p> <p>People AL-All Home and Transferred-In Edit New</p> <p>Time Period Ad Hoc</p> <p>Output Format AL-All Home and Transferred-In Arrears Employees Current Employees</p>
5	<p>From the Time Period drop-down list, select a relative time period, or select Range of Dates and enter the date ranges you want to view.</p> <p>For this exercise, select Range of Dates and enter a 30 day time span, using today's date for the start date.</p>	 <p>LEAVE HOURS DETAIL</p> <p>Description Displays leave hours details by employee.</p> <p>People AL-All Home and Transferred-In Edit New</p> <p>Time Period Range of Dates 3/06/2014 4/06/2014</p> <p>Output Format Adobe Acrobat Document(.pdf)</p>



Steps

6	Click Run Report .	 <p>The screenshot shows the 'REPORTS' interface with two tabs: 'SELECT REPORTS' and 'CHECK REPORT STATUS'. Under 'SELECT REPORTS', there are buttons for 'Run Report', 'Refresh', 'Create Favorite', 'Save Favorite', and 'Duplicate Fav'. A list of report categories is shown, including 'All', 'Accruals', 'Biometrics', 'Detail Genie', 'Leave', and 'Roll-Up Genie'. Under 'Leave', 'Leave Hours Detail' is highlighted in orange. On the right side, there are labels for 'LEAVE H', 'Descrip', 'People', 'Time Pe', and 'Output F'.</p>
7	<p>You are redirected to the Check Report Status tab.</p> <p>Review information in the Status column. Click Refresh Status.</p> <p>Wait until Complete displays in the Status column.</p>	 <p>The first screenshot shows the 'CHECK REPORT STATUS' tab with buttons for 'View Report', 'Refresh Status', and 'Delete'. A table lists reports with columns for 'Report Name', 'Format', 'Date In', and 'Status'. The 'Leave Hours Detail' report is shown with a status of 'Waiting'. The 'Refresh Status' button is circled in red. The second screenshot shows the same report with the status updated to 'Complete', also circled in red.</p>
8	To view the report, click the report name and select View Report . (Sample leave reports display in the following section.)	 <p>The screenshot shows the 'CHECK REPORT STATUS' tab with buttons for 'View Report', 'Refresh Status', and 'Delete'. The 'Leave Hours Detail' report is shown with a status of 'Complete'. The 'View Report' button is circled in red.</p>
9	(Optional) To print the report to a local printer, select the Print button from the menu that displays on the report.	



Sample Leave Reports

Leave Hours Detail

The Leave Hours Detail report lists detailed leave information for employees with open or closed leave cases for the requested time period.

Use the Leave Hours Detail report when you want to view leave information included in the Leave Cases View and the Leave Hours View, in one convenient report.

The report is sorted alphabetically by employee and includes (but is not limited to):

- Leave Case Status
- Leave Type
- Leave Type Amount
- Leave Category
- Leave Reason
- Committed Hours
- Additional Information

The following illustration is an example of the Leave Hours Detail report.

Leave Hours Detail									
Time Period: 12/01/2013 - 2/14/2014					Executed on: 1/22/2014 5:22PM GMT-06:00				
Query: All Home					Printed for: JohnA.Manager1				
Leave Case Status	Leave Category	Leave Case Reason	Leave Frequency	Leave Case Code	Initial Leave Request Date	Leave Start Date	Leave End Date	Latest Committed Date/Paid Leave	Latest Committed Date/Unpaid Leave
Stamp1, SandyA				ID:	10401				
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		2/5/2014	2/5/2014
		Day	Date	Indicator	Leave Time Amount	Leave Type	Committed Hours	Additional Information	
Rule: Family - Serious Health Condition as of 12/1/2013									
		Sun	12/1/2013					First Day	
		Mon	12/2/2013		8:00	LV - Sick	8:00		
						FMLA Family - Serious Health Condition	8:00		
		Wed	2/5/2014		4:00	LV - Sick	4:00		
						FMLA Family - Serious Health Condition	4:00		
Leave Case Totals for Selected Time Period									
Leave Type					Total Committed Hours				
LV - Sick					12:00				
FMLA Family - Serious Health					12:00				
					Committed Leave Time: 12:00				
Total Number of Employees: 1									



Leave Hours Summary

The Leave Hours Summary report lists, for each employee, all open or closed leave cases in the requested time period, as well as any requested leave cases in the requested time period.

Use the Leave Hours Summary report to itemize and record total committed hours in a specified time period.

The report is sorted alphabetically by employee and includes (but is not limited to):

- Leave Case Status
- Leave Category
- Leave Reason
- Total Committed Continuous Hours
- Total Committed Intermittent Hours

The following illustration is an example of the Leave Hours Summary report.

Leave Hours Summary											Executed on:	1/23/2014 3:35PM GMT-05:00	
Time Period: 12/01/2013 - 2/15/2014											Printed for:	SuperUser	
Query: All Home													
Leave Case Status	Leave Category	Leave Case Reason	Leave Frequency	Leave Case Code	Initial Leave Request Date	Leave Start Date	Leave End Date	Total Committed Paid Hours	Total Committed Unpaid Hours	Total Committed Continuous Hours	Total Committed Intermittent Hours		
Stamp1, SandyA ID: 10401													
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013	12:00	12:00	0:00	12:00			
Total:								12:00	12:00	0:00	12:00		
Stamp1, SandyB ID: 20401													
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013	8:00	8:00	0:00	8:00			
Total:								8:00	8:00	0:00	8:00		
Stamp1, SandyC ID: 30401													
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013	8:00	8:00	0:00	8:00			
Total:								8:00	8:00	0:00	8:00		
Stamp1, SandyD ID: 40401													
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013	0:00	0:00	0:00	0:00			
Total:								0:00	0:00	0:00	0:00		
Stamp1, SandyE ID: 50401													
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013	8:00	8:00	0:00	8:00			
Total:								8:00	8:00	0:00	8:00		
Total Number of Employees: 10													



Stamp1, SandyA ID: 10401													
Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013	12:00	12:00	0:00	12:00			
Total:								12:00	12:00	0:00	12:00		



Leave Hours Summary (Excel)

The options and report content in the Leave Hours Summary (Excel) report are the same as the Leave Hours Summary report.

Use the Leave Hours Summary (Excel) report if you plan to export the results to Excel for further sorting and analysis.

The following illustration is an example of the Leave Hours Summary (Excel) report.

Leave Hours Summary (Excel)													
Time Period: 12/01/2013 - 2/15/2014													
Query: All Home													
Executed on: 1/23/2014 3:59PM GMT-05:00													
Printed for: SuperUser													
Name	ID	Leave Case Status	Leave Category	Leave Case Reason	Leave Frequency	Leave Case Code	Initial Leave Request Date	Leave Start Date	Leave End Date	Total Committed Paid Hours	Total Committed Unpaid Hours	Total Committed Continuous Hours	Total Committed Intermittent Hours
Punch1, PennyA	10201	Open	Self	Birth	Continuous	FBABY	1/21/2014	12/2/2013	1/31/2014	0:00	0:00	0:00	0:00
Punch1, PennyB	20201	Open	Family	Family - Parent	Intermittent	FPARNT	1/21/2014	12/1/2013		0:00	0:00	0:00	0:00
Punch1, PennyC	30201	Open	Family	Family - Parent	Intermittent	FPARNT	1/21/2014	12/1/2013		0:00	0:00	0:00	0:00
Punch1, PennyD	40201	Open	Family	Family - Parent	Intermittent	FPARNT	1/21/2014	12/1/2013		0:00	0:00	0:00	0:00
Punch1, PennyE	50201	Open	Family	Family - Parent	Intermittent	FPARNT	1/21/2014	12/1/2013		0:00	0:00	0:00	0:00
Stamp1, SandyA	10401	Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		12:00	12:00	0:00	12:00
Stamp1, SandyB	20401	Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		8:00	8:00	0:00	8:00
Stamp1, SandyC	30401	Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		8:00	8:00	0:00	8:00
Stamp1, SandyD	40401	Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		0:00	0:00	0:00	0:00
Stamp1, SandyE	50401	Open	Family	Family - Parent	Intermittent	FPARNT	1/22/2014	12/1/2013		8:00	8:00	0:00	8:00



Notes