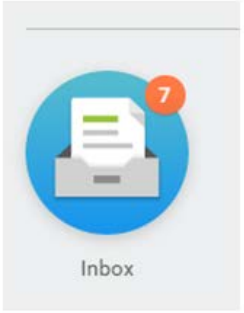
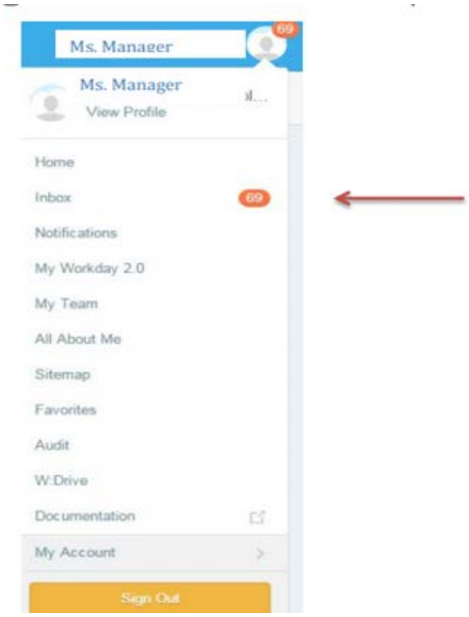
Paid Time Off (PTO) Quick Reference (Manager)

RESPONDING TO A PTO REQUEST

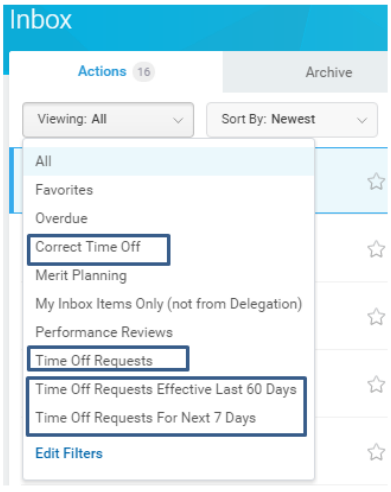
A notification will appear in your Workday *Inbox* when you have a PTO request from a direct report. You can access your inbox directly from your homepage *Inbox* icon or by clicking on your name in the upper right hand corner and selecting *Inbox* from the drop down menu.



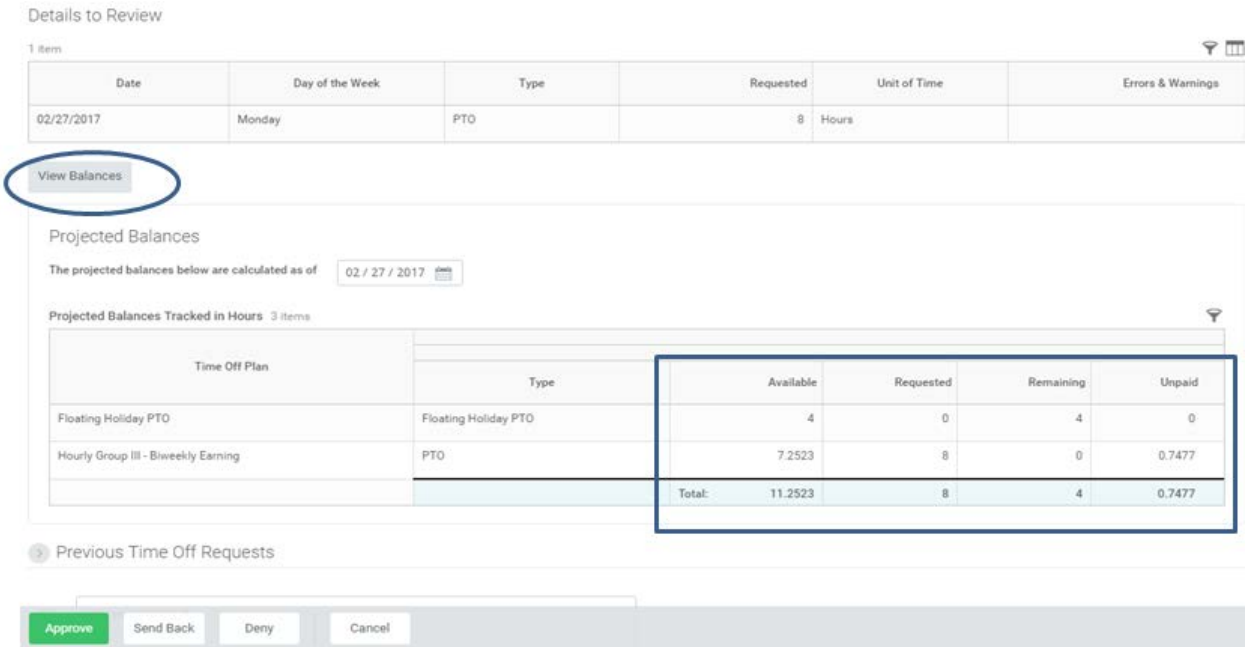


You can sort your inbox by category.

- If you prefer to only see ***Time Off Requests***, sort on that option.
- If you prefer to only see requests to ***Correct Time Off***, sort on that option.
- Select ***Time Off Requests Effective Last 60 Days*** or ***Time Off Requests for Next 7 Days*** filters to see requests based on effective date of absence based on filter selected.



When you click on the request, details regarding the request will appear on the right side. Click on ***View Balances*** and take note of the information presented, especially reviewing the individual's available hours. Note: Individuals in a biweekly earning PTO plan are able to submit a future time off request prior to having the requested hours available in their balance, with the expectation that sufficient paid time off hours will be earned and available to cover the requested hours. ***It is recommended that you review and make note of the request but delay final approval until available hours have actually been earned to cover the requested time. If sufficient hours are not available as of the requested date, the manager should deny the original request and ask the employee to submit a new request for available hours only. If you approve a request that results in unpaid time, the individual will only be paid for available hours, but the time off request and the hours entered into Kronos will reflect requested, not paid hours.***

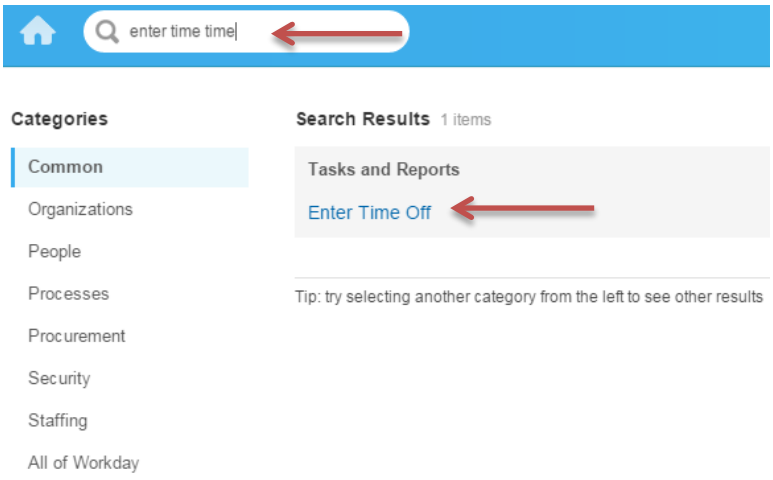


You may ***Approve***, ***Send Back*** or ***Deny*** a request. If the request is for multiple days your action (Approve, Send Back or Deny) includes **all** days.

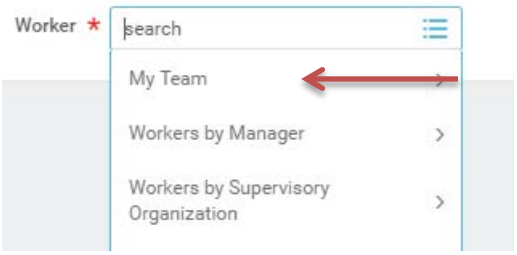
- The ***Send Back*** feature is used **ONLY** if you need additional information about the requested day (i.e. the employee forgot to indicate the specific time of day they are requesting to be off).
- The ***Deny*** feature is used when you are unable to accommodate part or all of the request, or if you believe the day requested is incorrect.
- Should you use either the ***Send Back*** or ***Deny*** feature, comments are required.
- ***Cancel*** backs you out of the review.

ENTER OR CORRECT TIME OFF ON BEHALF OF THE EMPLOYEE

The manager or manager's manager may *enter* or *correct time off* on their direct or indirect reporting employee's behalf. In the search field type in "enter time off" or "correct time off." Select the correlating item from the search results area.



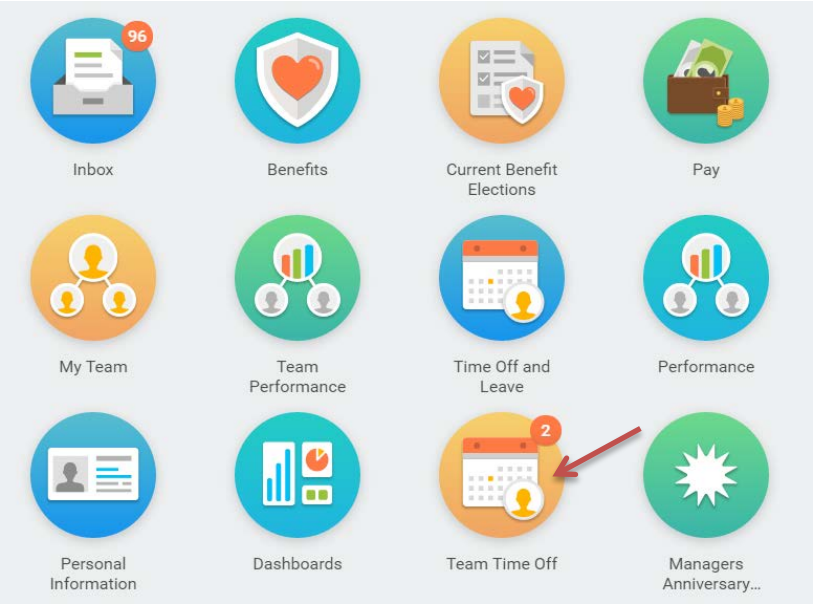
Click on the prompt in the Worker field. Select the "My Team" arrow and find the employee you wish to perform either an entry or correction on. Click *OK*.



Proceed just as you would to enter or correct time off for yourself. Once on the calendar page make note of employee's available hours in the *Balance As Of* pane. No additional approval is needed since you (the manager or manager's manager) are *entering* or *correcting* the time off on behalf of the employee.

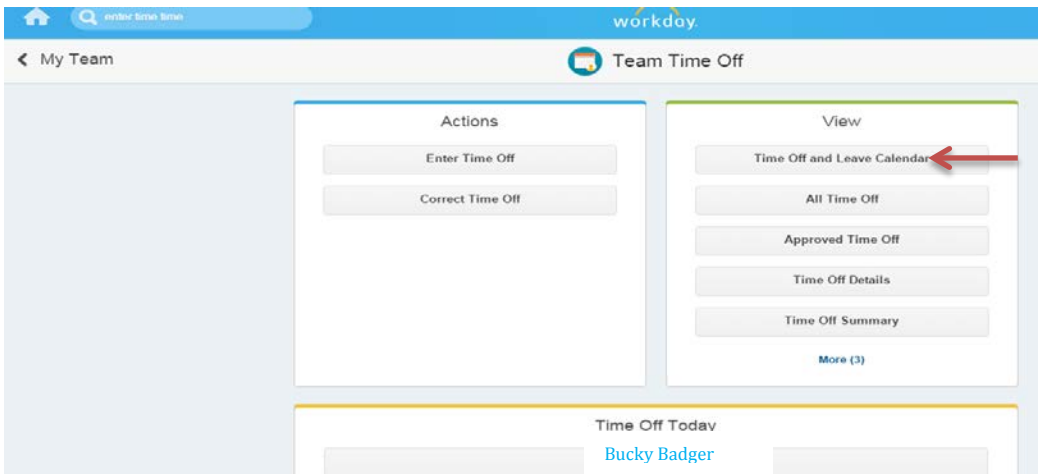
TEAM TIME OFF

From your Workday Home Page Select *Team Time Off* icon to open up the available selections.

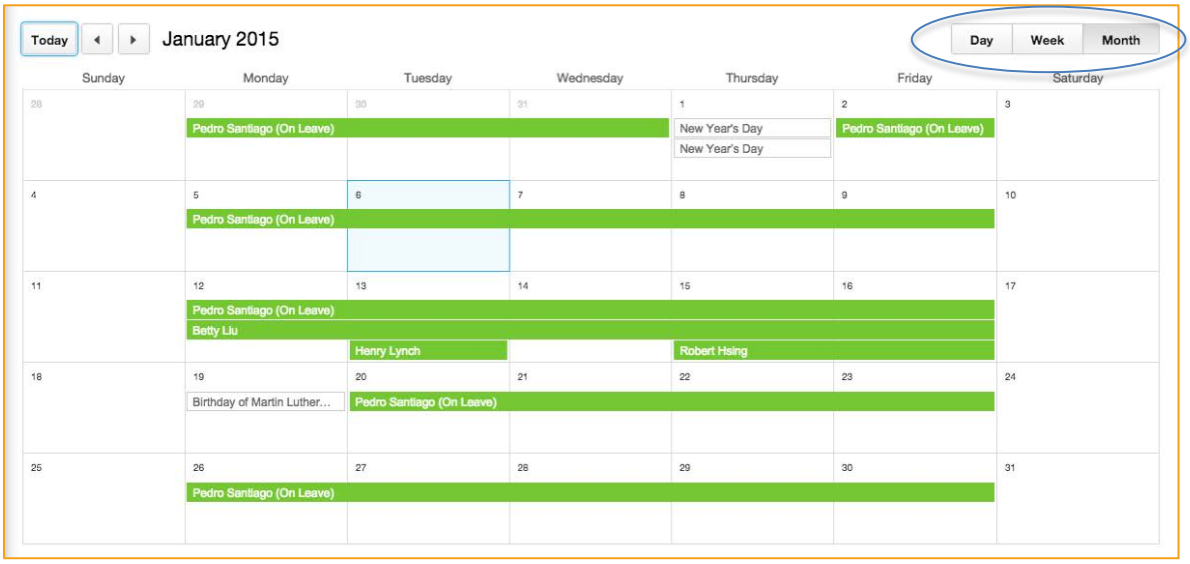


The Team Time Off screen allows you to select multiple functions. For example, you can initiate ***Enter Time Off*** or ***Correct Time Off*** for an employee directly from this screen. You can review ***All Time Off*** details for your staff for a specific date range or only ***Approved Time Off*** for a specific date range. You can further review paid time off balances for your direct reports for a specific period via ***Time Off Details*** or ***Time Off Summary***. It also is a quick reference showing who has ***Time Off Today***.

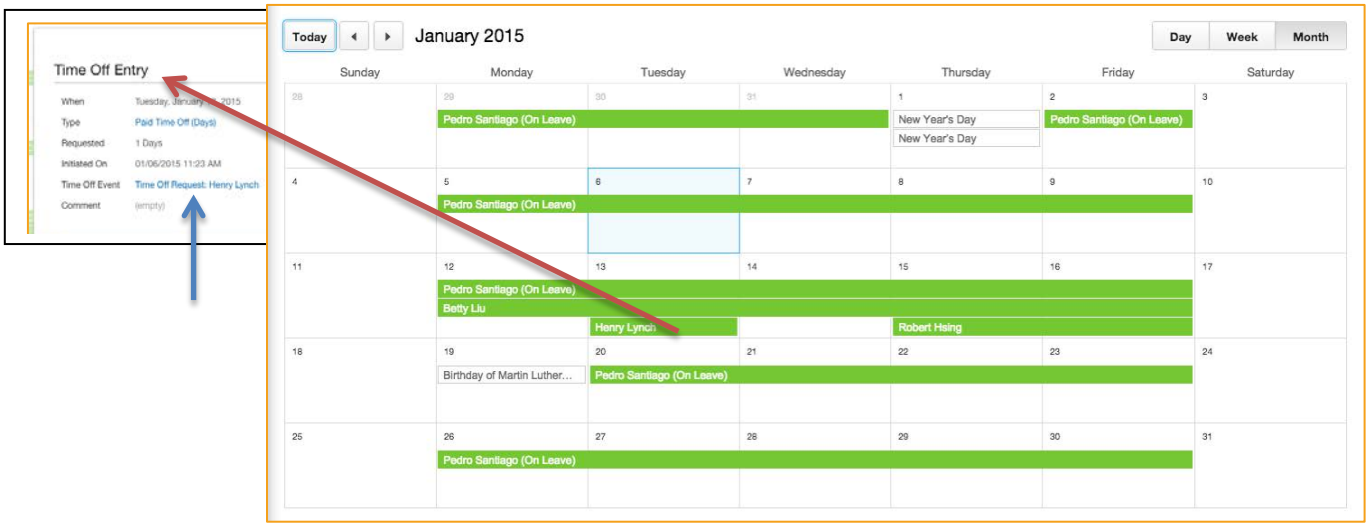
The ***Time Off and Leave Calendar*** selection is extremely helpful to review "big picture" direct report absences.



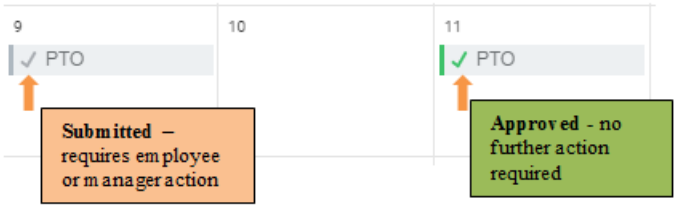
You can view it in day, week, or month view.



You can click on a T*ime Off Entry* and if in the request is in a *submitted* status, review and act on the request directly from the calendar page by then clicking on the blue *Time Off Event* link in the pop up window.



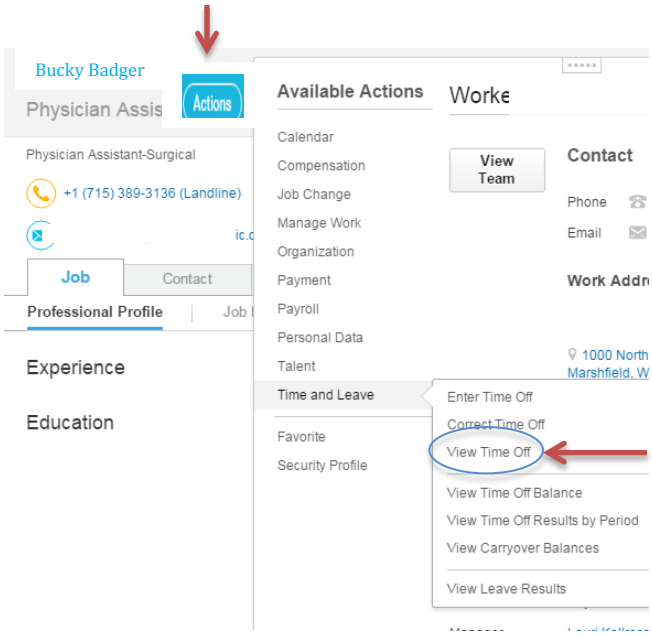
The status of the Time Off is easily reviewable based on the visuals.



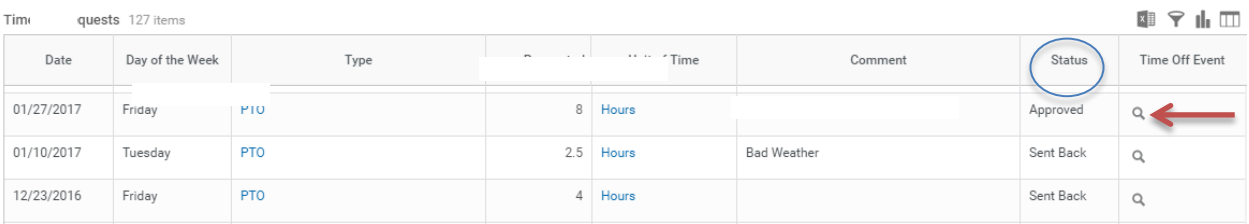
VIEW TIME OFF

To see all past and future time off actions on one page for a select employee, click on the Action icon off of their name

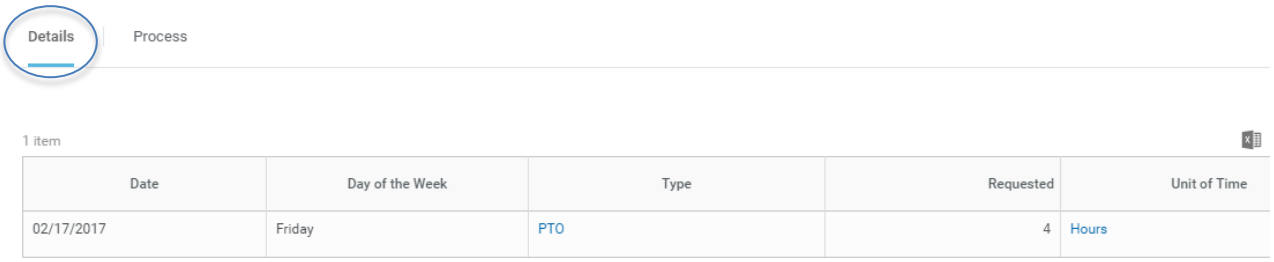
, scroll down to ***Time and Leave*** and select ***View Time Off***.



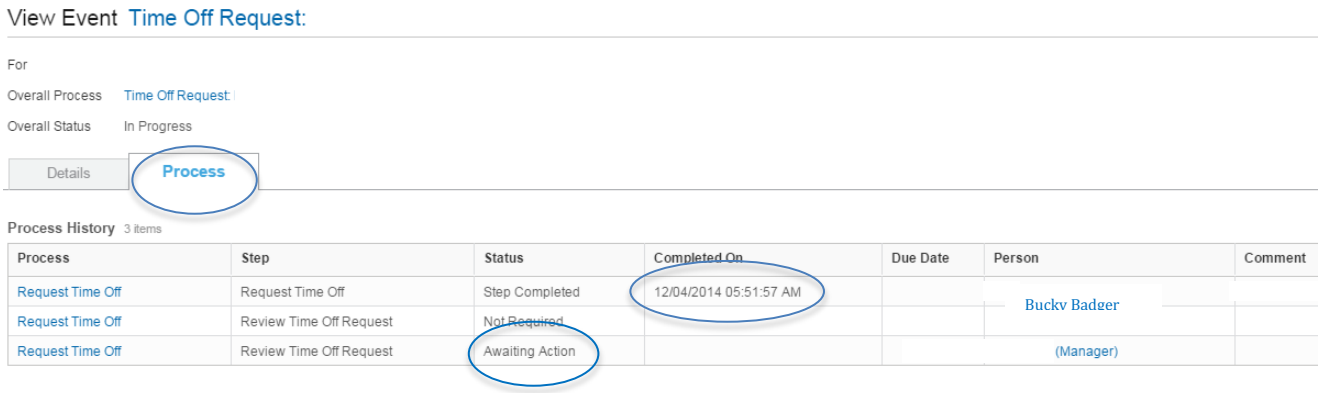
The ***Time Off*** screen allows you to see the status of past and future time off events. You can also review the *details* and *process* of the time off requests by clicking on the search icon associated with the time off in the *Time Off Event* column.



This allows you to review the details of the request (Details tab).



Or review the date and time each part of the request was acted on (Process tab), comments associated with the request, where the request is in the process, etc.

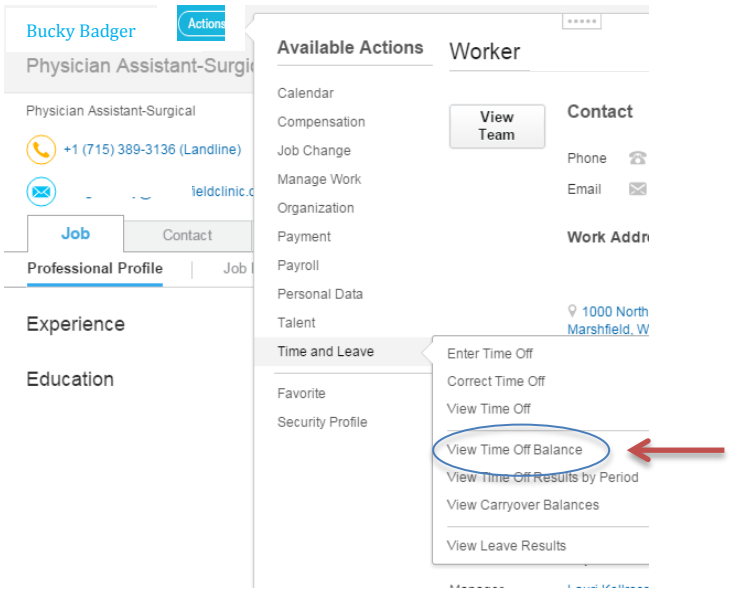


VIEW TIME OFF BALANCE

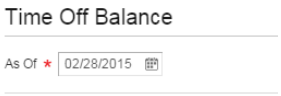
You may review an employee's time off balance in a number of different ways in Workday.

- From their individual calendar page based on the selected As Of Date
- As part of the inbox action request
- By clicking on the Action icon

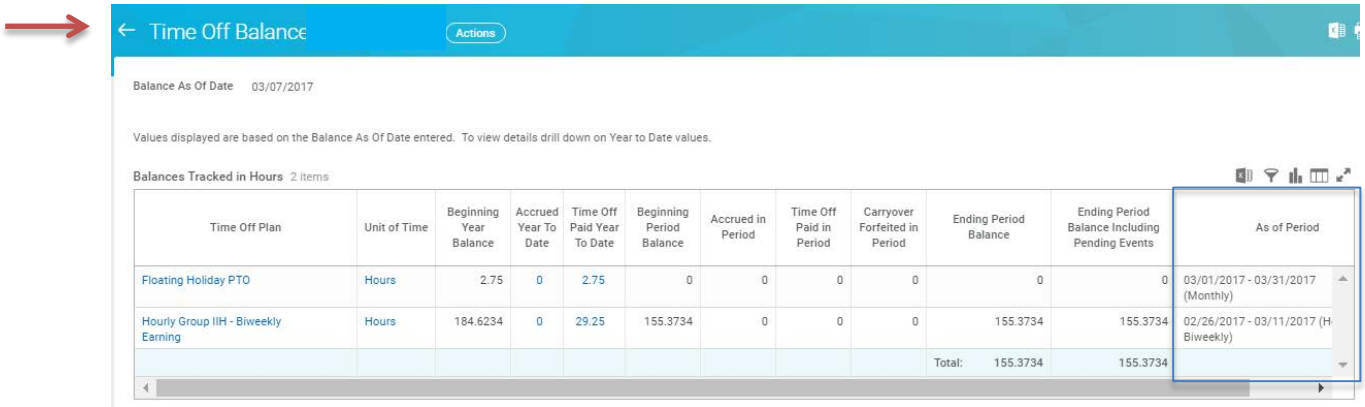
off of their name, scroll down to ***Time and Leave***, click ***View Time Off Balance***



Select a specific "as of" date to view the time off balance. It is often best to use the beginning or end of a pay period as a reference.



You can change the "as of date" by clicking on the back arrow icon next to the name.



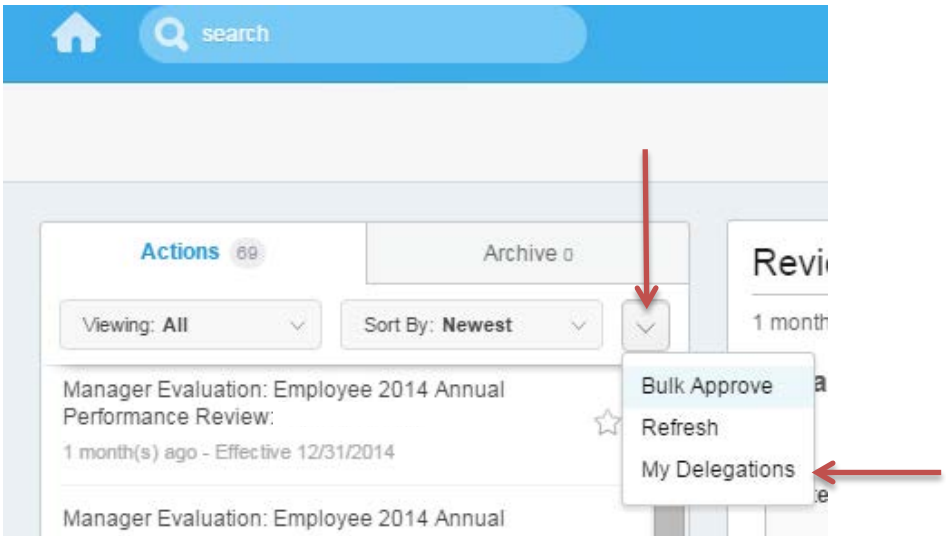
Note: Workday continues to display old PTO balances that employees are no longer eligible for just as a reference. The ***As Of Period*** would indicate if the balance is for a previous period in time and no longer a current PTO plan.

ASSIGN A DELEGATE TO RESPOND TO INBOX PTO REQUESTS

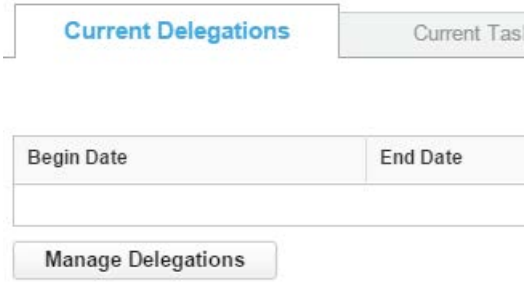
At times, such as when you (the manager) are out of the office for more than a day, you will need to assign a delegate to complete INBOX PTO tasks on your

behalf. To set up a delegate, start by clicking on your Workday ***Inbox*** link in your Workday "Options" dropdown menu. This is found in the upper right hand corner of your screen.

Click on the drop down arrow in your Inbox to access settings and Click on *My Delegations* from the drop down list.



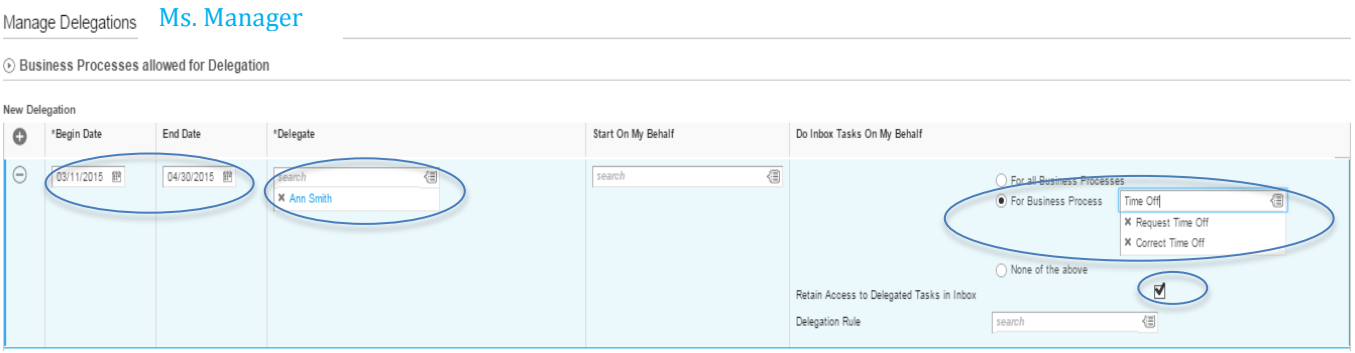
Click on the ***Manage Delegations*** button.



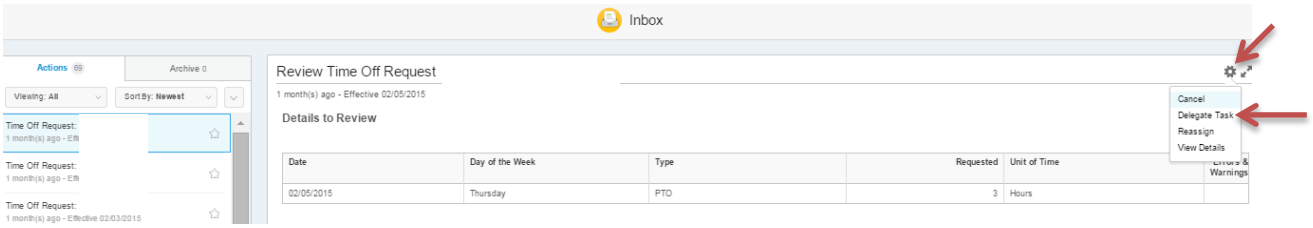
1. Use the calendar icons to fill in the "Begin Date" and "End Date" to coordinate with the dates you will be out of the office, or the time span you wish to assign someone as your delegate.
2. Enter your delegates name in the Delegate field and then Select your delegate from the list presented.
3. Skip the field called, "Start On My Behalf" (do not enter anything there).
4. In the "**Do Inbox Tasks On My Behalf**" section you have the option to assign specific tasks or assign all business processes to your delegate. In this example we want our delegate to only responding to PTO requests. To delegate just the

PTO tasks, Click the button that says “For Business Process” and type “Time Off” in the search field, and push “enter” on your keyboard. You will be presented with the option to select “Correct Time Off” and “Request Time Off”. Click on each of these business processes (Correct Time Off and Request Time Off) to add them to your list of delegated tasks.

5. Click on “Retain Access to Delegated Tasks in Inbox”, which allows you to review and act upon tasks also, or review any remaining in-completed tasks once you return to work and your delegation has expired (if applicable).
6. Click on the *SUBMIT* button at the bottom of the page.

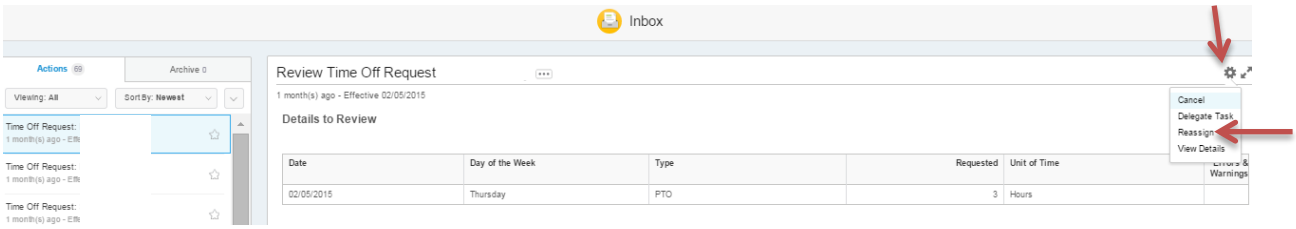


You also have the ability to delegate individual inbox tasks on a case-by-case basis by clicking on the “gear” icon on the right hand corner of the request details. Select ***Delegate Task*** and add a name in the ***Proposed Delegates*** field. This will then redirect this one request to your selected delegate.

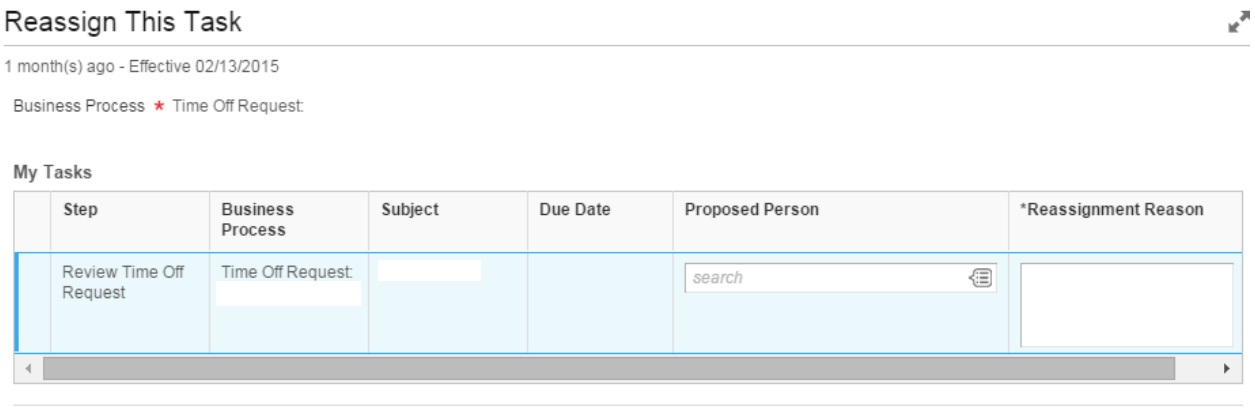


REASSIGN AN INBOX TASK

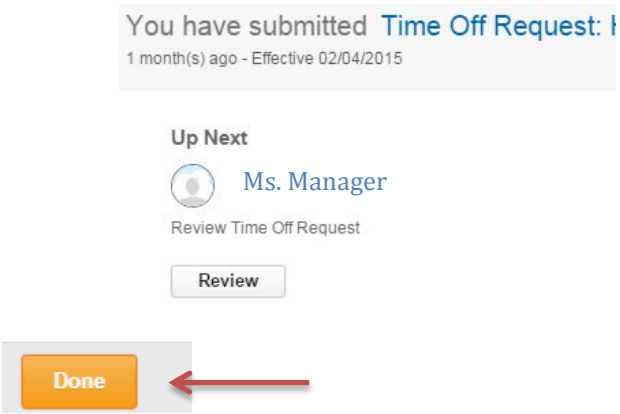
In addition, you can ***Reassign*** individual inbox tasks on a case-by-case basis by clicking on the “gear” icon in the right hand corner of the request details.



Select ***Reassign,*** add a name in the ***Proposed Person*** field, enter a ***Reassignment Reason*** and then click ***OK***.



You will then be given the option to review the original request or to complete the reassignment transaction by selecting ***Done*** at the bottom of the screen. Select ***Done***. Once the reassignment request is approved by an Absence Partner (HR), the request will be removed from your inbox tasks.



Reassign is more limiting in that you can only reassign a task to an Absence Partner, the employee's manager if now someone other than yourself, or the manager's manager. **This is useful if a reporting relationship has changed and you have pending inbox tasks for the employee that need to be reassigned to the new manager.**