



## All Employees

### Viewing and Tracking Leave Balances and Future Requests:

1. Employees are responsible for keeping track of their leave balances and future requests to ensure they do not request more leave than is or will be available at the time the absence is taken.
  - Employee Self Service (ESS) > Time tile > Absence Balances tile
  - Employee Self Service (ESS) > Time tile > View Requests tile
2. Accrued Vacation, Sick, and Personal leaves are added to balances at the beginning of each pay period and will appear in your Absence Balances tile when the pay period is opened, even if your accrual date is later in the period. However, you cannot take newly accrued leave until your accrual date.
  - If you submit a request without sufficient balance, you will be ineligible which will result in payroll errors such as you not being paid for the absence.
  - You will see a warning appear if you attempt to request more hours of leave than you have accrued and available.
3. Balances are not updated in real time.
  - Processes must run overnight to calculate changes entered during the day.
  - Entries or changes made after 5:45 p.m. EST will not be processed that same night.
4. Absence Balance tile includes the following information:
  - Balance of Comp Time, Personal, Vacation, and Sick Leaves as of the final date of the current pay period.
    - These balances are calculated by adding any accruals and subtracting any takes (usage of leave) that have been requested and processed as of the beginning of the pay period.
    - Changes (e.g., earning additional comp time, cancelling previous leave requests, or submitting new requests for leave or comp time usage during the current pay period) will not be reflected in the balance until they have been processed.
  - Forecast Balance section allows you to choose a future date and calculate a potential future balance of vacation, sick, or personal leave.
    - The forecast adds accruals anticipated between today and the future date and subtracts any absences already requested and processed.

- Go to View Requests to doublecheck any future requests that might reduce the amount of leave available on the forecasted date.
- Accrual Dates section provides your accrual date. This sets the date and pattern on which new accruals become available for use. You are responsible for knowing your accrual date.

### **Requesting and Canceling Absences:**

5. Obtain your manager's approval separate from and in advance of entering your absence request in PeopleSoft® and keep track of your own leave balances and any other requests already in the system. A status in PeopleSoft® of "Approved" or "Eligible" does not mean you are authorized to take the leave. You must communicate with your manager, obtain permission, then enter the absence into PeopleSoft®.
6. You must select the Check Eligibility button for each absence request and heed Warnings that appear when you attempt to submit an Absence Request.
  - See #1 above about your responsibility for knowing your balances and future requests, #2 about the timing of leave accruals versus availability to use those accruals, and #3 about timing of balance calculations.
  - If you do not understand the pop-up warning message, contact your Agency Payroll Staff or the Employee Relations Division of INSPD at 855-773-4647, Option 4.
7. If you are uncertain how much leave you need (e.g., for a doctor's appointment), discuss the absence with your supervisor and obtain approval in advance but do not enter it in PeopleSoft® until you return from the appointment and know exactly how much leave time was needed.
  - If you enter the request in advance but use a different amount of leave, you must first navigate to the Cancel Absences tile to remove the first request, then navigate to the Request Absence tile to enter the correct amount of leave taken.
  - If you need more or fewer leave hours than your scheduled shift, use the Partial Days section of the Absence Request screen.
8. Submit separate requests so the start & end dates of each request are in a single pay period.
  - Example (2022): Submit 2 requests: July 18-22 and July 25-29.
9. Submit separate requests for workdays on either side of a holiday.
  - Example (2022): Submit 2 requests: June 30 - July 1 and July 5 rather than one request from June 30 - July 5.
10. Once an absence request is approved in PeopleSoft®, it will remain in approved status even in the event of conflicting absence requests pulling from the same balances. Therefore, it is important to enter absence requests in PeopleSoft® close to the absence date to avoid using the same leave balances in more than one request.
  - Example: You have four vacation days available on July 1 and you request to use all four days in August. You then decide to use a vacation day on July 24. When you

make the request to use a day on July 24, your available balance still shows four vacation days because the August days have been requested but not used yet. If you fail to cancel the 4-day absence in August, your paycheck will be short that pay period because you already used one of those vacation days on July 24.

- Action: Navigate to Employee Self Service (ESS) > Time tile > View Requests tile upon receiving a pop-up warning message and determine which absence(s) must be canceled if the total number of hours you have requested exceeds the balance you will have available at the time of each future absence, then cancel existing requests and submit new requests that stay within the limits of your balances.

### **Extended Absences, Family & Medical Leave (FML), and New Parent Leave (NPL):**

11. Managers do not have security access to enter Extended Absences (FML or NPL) on behalf of employees. If the employee's condition makes it impossible to enter their own request, managers must contact their Absence Administrator. For agencies using INSPD centralized or shared HR services, your Administrator is the INSPD Employee Relations Division at 855-773-4647, Option 4. Have the following information when you call:
  - Employee's Name and PSID#
  - Employee's FML Request ID#
  - Number of hours/date range of absence
  - What leave type, if any, will be used with the FML
  - For continuous leave, start date and whether employee has been approved for Short Term Disability
12. Balances for FML and NPL will appear in the Absence Balances tile along with vacation, sick, personal leaves and comp time balances.

## Managers

### Approving and Delegating Absence Approvals:

13. The Approvals Tile will never show a timesheet view.
  - Auto Approval of absences means those requests never appear in a manager's Approval Tile.
    - When auto-approval is active, employees must obtain managers' permission for leave in advance using whatever process the agency or manager require (e.g., email, meeting notice, text, voicemail)
  - Even without auto-approval, hours worked and absence requests will appear in the Approvals Tile when submitted and will vanish from that view as you approve each item.
  - To see a timesheet view showing hours reported and approved absences, follow this path: Team Time > Timesheet > Time Summary. This view shows both Reported Hours and Absences, then go to Approvals tile to approve timesheets.
14. Delegations must be made to another appropriate manager whenever the manager will not be available to approve timesheets (or absence requests if auto-approve is not active).

## **Agency Payroll Staff & Absence Administrators**

### **Family Medical Leave (FML) and New Parent Leave (NPL)**

15. FML and NPL usage must not be entered on the Absence Event page.
  - FML and NPL must be entered only into the Extended Absence Request pages and only employees and Absence Administrators have access to these pages (for Centralized agencies, Administrators are INSPD-Employee Relations staff).
  - Managers no longer have the ability to enter in extended absences for their employees and must contact the agency's Absence Administrator.
16. If an employee cannot enter their own request within the timeframe for the affected pay period, managers or agency payroll staff must contact their Absence Administrator. For agencies using INSPD centralized or shared HR services, your Administrator is the INSPD Employee Relations Division at 855-773-4647, Option 4. Have the following information when you call:
  - Employee's Name and PSID#
  - Employee's FML Request ID#
  - Number of hours/date range of absence
  - What leave type, if any, will be used with the FML
  - For continuous leave, start date and whether employee has been approved for Short Term Disability

### **Completing an Absence Request on behalf of an Employee**

17. Do not leave absences in the workflow marked as "Needs Approval," "Saved," and/or with a forecast value of "Ineligible" or blank. Any of these statuses means the leave will not be processed. To confirm the request is in the proper status, on the Absence Event page, follow these instructions:
  - Review the Absence Take tab to make sure the Workflow Status is updated to "Approved."
  - Review the Forecast Value tab to make sure the forecast value is "Eligible" or "Warning."
  - If these statuses do not appear action must be taken to correct, and you may contact the INSPD Employee Relations Department at 855-773-4647, Option 4, for assistance.

18. See also #8 and #9 above.

### **Notes on Accruals in View Balances**

19. Accruals are calculated and appear in View Balances at the beginning of the pay period; however, employees are ineligible to use those hours until their actual accrual date. If an employee submits a request without sufficient balance, it might result in errors in payroll processing.
20. Balances are not updated in real time.
  - Processes must run overnight to calculate changes entered during the day.

- Entries or changes made after 5:45 p.m. EST will not be processed that same night.
- The new pay period cannot be opened until the previous pay period is closed by the confirmation of payroll; therefore, balances may not be accurate between the last Saturday of a pay period until the following Thursday. If there are problems processing payroll, the delay could be longer.