

# Human Resource Management System

## Workday Job Aid Time Off



Employees will enter their time off requests, which are forwarded to their Manager for review and approval. Once processed, time off is available to view and correct by the Employee and is visible on the Team Time Off view for Managers.

- Employees
- People Managers
- Human Resources

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### 1. Time Off Overview

The concept of taking time away from work is broken into two categories: **Time Off** and **Leave of Absence**. Time Off deals with short periods in which there is a clear end date. Examples of this type are sick, vacation, or jury duty. Leave of Absence, which is covered in a separate Job Aid ([SC-TRN-020 Job Aid - Leave](#)), deals with extended periods in which an end date is not always known. Examples of this type include FMLA, Workers Comp, and Military Leave.

In both cases, the **ABSENCE** application is used by the employee to view information related to time off as well as enter and submit requests to take time off away from work.



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### 2. View Time Off

Tracking your accrual amounts is important to every employee. So is being able to see your time off requests and whether they have been approved or not. In Workday, leveraging the **Absence** application all of this is possible and then some.

1. To see a quick review of your accruals open the **Absence** application and scroll to the bottom of the page. There you will find a basic summary such as this:

Available Balance as of Today
Does not include future absence requests
250.26 Hours - Sick
165.25 Hours - Vacation
0 Hours - Cancer Screening
0 Hours - Comp Time - Straight Time
0 Hours - Comp Time
70 Hours - Deferred 2009
28 Hours - Personal
0 Hours - Sick- Frozen
0 Hours - Sick- Frozen 2
0 Hours - Vacation-Frozen
0 Hours - Vacation-Frozen 2

2. To see a more detailed view of your accruals click on the **Absence Balance** item under the View section (see below).

Request	View
<a href="#">Request Absence</a>	<a href="#">My Absence</a>
<a href="#">Correct My Absence</a>	<a href="#">Absence Balance</a>
<a href="#">Request Return from Leave of Absence</a>	

3. Next, you will be asked to enter the **As Of Date** that you would like to review your accruals by. The system will default to today's date.



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- You will be presented with a grid that details the Absence balances as of the date entered. This includes vacation, sick, personal, etc.

Absence Balances as of Current Date											
Balances Tracked in Hours 10 Items											
Absence Plan	Unit of Time	Beginning Year Balance	Accrued Year To Date	Absence Paid Year To Date	Beginning Period Balance	Accrued in Period	Absence Paid in Period	Carryover Forfeited in Period	Ending Period Balance	Ending Period Balance Including Pending Events	As of Period
Vacation	Hours	334.25	0	0	334.25	0	0	0	334.25	334.25	11/16/2020 - 11/29/2020 (Regular)
Cancer Screening	Hours	0	0	0	0	0	0	0	0	0	11/01/2020 - 11/30/2020 (Monthly)
Comp Time- Straight Time	Hours	0	0	0	0	0	0	0	0	0	11/16/2020 - 11/29/2020 (Regular)
COVID Comp Time	Hours	0	0	0	0	0	0	0	0	0	11/16/2020 - 11/29/2020 (Regular)
Deferred 2009	Hours	70	0	0	70	0	0	0	70	70	11/16/2020 - 11/29/2020 (Regular)
Personal	Hours	28	0	0	28	0	0	0	28	28	11/16/2020 - 11/29/2020 (Regular)
Sick- Frozen	Hours	0	0	0	0	0	0	0	0	0	11/16/2020 - 11/29/2020 (Regular)
Sick- Frozen 2006	Hours	0	0	0	0	0	0	0	0	0	11/16/2020 - 11/29/2020 (Regular)
Sick	Hours	195.75	0	0	195.75	0	0	0	195.75	195.75	11/16/2020 - 11/29/2020 (Regular)
Vacation-Frozen	Hours	0	0	0	0	0	0	0	0	0	11/16/2020 - 11/29/2020 (Regular)
<b>Total:</b>									<b>628</b>	<b>628</b>	



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### 3. Request, Correct, Cancel Time Off

An employee can manage their time-off requests from the **Absence** application located on the Workday Home page. This application provides access to a host of capabilities all centered around the notion of managing an employee's time off. In this lesson, we will review the steps involved to request time off, update a previously submitted time-off request, as well as how to cancel a time-off request.

**Note:** For those employees that have to report their In/Out times you will need to remove any scheduled work hours from your timesheet (if present) for the day(s) you wish to take off before submitting your time off request. Failure to do so will result in an error stating "time block overlap". If when attempting to remove your scheduled hours you encounter a "time period lockout" error, you will need to wait until the Wednesday before payday to remove your scheduled hours.

**Note:** For those employees that work multiple shifts in a day, when requesting a full day off you only need to submit one request. To accomplish this you will enter the start time of your first shift and the end time of your last shift. You will then enter the number of hours you typically work in a day.

For example, if you work from 6 AM – 10 AM and then again from 2 PM – 4 PM, for a total of 6 Hrs, you would enter a time off request that states 6 AM – 4 PM for 6 Hrs.



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### Request Time Off

- 1) Click the **Request Absence** link on the Absence page. The unified absence calendar displays.

A screenshot of the Workday Absence page. The page is divided into two columns: 'Request' and 'View'. The 'Request' column contains three buttons: 'Request Absence', 'Correct My Absence', and 'Request Return from Leave of Absence'. The 'Request Absence' button is highlighted with a red rectangular box. The 'View' column contains two buttons: 'My Absence' and 'Absence Balance'.

- 2) Click on the day(s) you wish to take time off or click and drag to select multiple days. Click on a selected day to deselect it.
  - a) **Note** – Click the **Select Date Range** button to enter an extended date range. This is useful when entering an absence request that might extend into a different month or over a long period.
- 3) Click the **Request Absence** button. The number of days you requested dynamically displays on the button to help confirm your request.
- 4) Select the **Type** of absence requested from the choices provided and then click the **Next** button.
- 5) Click on the **Edit Quantity per Day** button and fill in the Start Time and End Time along with the corresponding numbers of hours per day you wish to take off.
- 6) Click the **Done** button.
- 7) Enter **Comments** as needed.
- 8) Upload any corresponding documentation if required.
- 9) Click the **Submit** button to submit the request for processing.



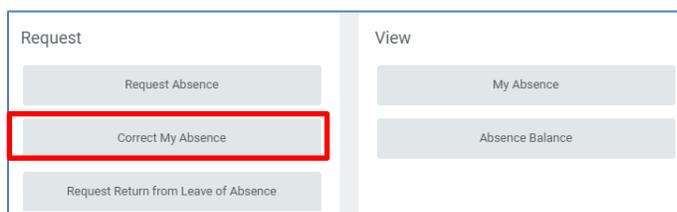
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### Correct Approved Time Off

**NOTE:** Submitted time off requests that have yet to be approved by a supervisor cannot be updated. Instead, they are to be canceled and resubmitted.

- 1) Click the **Correct My Absence** link on the Absence page. The unified absence calendar displays.



- 2) On the calendar displayed click on the posted time off you wish to correct. This will display the **Correct Absence** page.
- 3) Select the day(s) you want to correct or click the **Remove Row** icon to remove an entire day.
- 4) Enter the Type if an adjustment is needed.
- 5) Enter the new **Start Time** and **End Time** as needed.
- 6) Enter a **Comment** as needed.
- 7) Upload any corresponding documentation if required.
- 8) Click the **Submit** button to submit the updated request for processing.

### Cancel Time Off

- 1) Click the **Correct My Absence** link on the Absence page. The unified absence calendar displays.
- 2) On the calendar displayed click on the posted time off you wish to cancel.
  - a) If the request has been approved
    - (a) Click the Remove Row icon to remove the time-off request for each day you wish to cancel. and then click Submit.
  - Note:** Updates to Approved Time Off requests require the manager to approve the update.
  - b) If the request has not been approved a details page of unapproved time will be displayed.
    - (a) Click the Cancel this Request button and then click Submit.



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### 4. Sick time with Note

The submission process of a sick request when a Doctor's note is involved needs to be handled in a specific manner for it to be successfully processed. It is important to understand that at the time the sick request is submitted in Workday if the Doctor's note is not available to be uploaded and attached to the request, the Reason code selected initially is to be "Sick No Note". A correction to the request will be made once the Doctor's note is available to be uploaded. During the **Absence Correction** task in which the Doctor's note is attached, the **Reason** must also be updated to "Sick with Note".

The following are detailed instructions on how to process a Sick Request in which a Doctor's note is initially unavailable but is expected to be obtained.

1. Click on the View All Apps link on the right side of the Homepage.
2. Click the **Absence** application.
3. Click on the **Request Absence** option under the Change menu.
4. Select the day(s) that make up the absence request.
5. Click on the **Request Absence** button located at the bottom right of the page.
6. On the **Select Absence Type** Pop-up, click on **Frequently Used Time Offs** and then click on the **Sick (Hours)** option.
7. Click the **Next** button.
8. On the next page click the **Edit Quantity Per Day** button on the right side of the page.
9. Enter in the **Start Time** field the time your request will begin (e.g. 8 AM).
10. Enter in the **End Time** field the time your request will end (e.g. 4 PM).  
**Note:** If you are requesting a full day off, enter the times you start work and end work. If you are requesting a partial day, enter the times you will not be working (e.g. 1 pm & 4 PM).
11. Now enter the total hours you are taking off (e.g. 7) in the **Quantity per Day** field.
12. Click the **Done** button.
13. At this point, a **Reason** must be selected for the sick request. If a Doctor's note is in your possession and available for upload, select the "Sick with Note" option, otherwise select the "Sick No Note" option.



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**Note:** If you expect to receive a Doctor's note after the submittal of this request, you can update the absence request by using the **Correct My Absence** task in the **Absence** app (See instructions below – **Updating a Sick Absence with a Doctor's Note**).

14. If a Doctor's note will be added to this request at a later date add a **Comment** stating that.

15. Click the **Submit** button.

**Note:** The request will now be sent to your supervisor for approval.

### **Updating a Sick Absence with a Doctor's Note.**

The following are detailed instructions on how to update a submitted Sick Request by adding a Doctor's note.

1. Click on the **View All Apps** link on the right side of the Homepage.
2. Click the **Absence** application.
3. Click on the **Correct My Absence** option under the **Change** menu.
4. Click on the sick request listed on the calendar that you want to update.

**Note:** If the sick request in question has not been approved yet by your supervisor you will click on the **Cancel this Request** button at the bottom of the page, add a comment, and then click on the **Submit** button. After that, follow the instructions above to submit the sick request all over again, this time select the **Reason** of "Sick with Note" and attach the Doctor's note.

**Note:** For all previously approved sick requests follow these steps to add a Doctor's note.

5. On the **Correct Absence** page scroll to the **Reason** field and change the value from "Sick No Note" to "Sick with Note".
6. Add an electronic copy of the Doctor's note in the **Attachments** area by either dragging the file to the **Drop file here** area or by clicking on the **Select Files** button and selecting the file from a folder located on your device.
7. Enter "Doctor's Note" in the **Description** field.
8. Select "Time Off" in the **Category** field.
9. Click the **Upload** button.
10. Click the Submit button.

**Note:** The updated request will now be sent to your supervisor for approval.



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### 5. View Time Off Balances

An employee can view their time off record by clicking on the **Time** worklet from the Home page.

Enter Time	View
This Week (0 Hours)	My Schedule
Last Week (28 Hours)	My Time Off
Select Week	<b>Time Off Balance</b>
Overtime Requests	Time Clock History

1. Click the **Time Off Balance** link on the View section of the Time page.
2. Enter the **As Of** date to designate the point in time you would like the review based on. (Workday defaults to today's date). Click the **OK** button.
3. You will be provided a grid that displays a complete breakdown of the time off balances for each of the categories recognized by the County.



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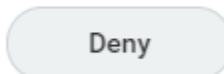
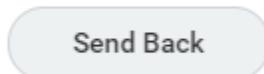


### 6. Approve & Deny Time Off Requests

Time off requests submitted through Workday always requires approval. This approval is performed by an employee's manager. Once an employee's time off request is submitted an approval task is created and routed to the Manager's **Inbox**. To view these tasks, the manager will access their Inbox and look for the tasks that start with **Absence**.

1. Click on the specific time off request listed in the Inbox to be reviewed.
2. On the right side of the page, the manager will see the details of the request along with the Time Off Balance information for the employee as of the current date (Click the View Balances button).
3. The manager has three options concerning the processing of a time off request.
  - a. They can click the **Approve** button to process the request. This task will generate a notification that will be sent to the employee.
  - b. They can click the **Send Back** button requesting the employee to make changes to the request before resubmitting it. During this process, the manager will enter a reason as to why the request is being sent back. This reason should provide the employee with the necessary information to make adjustments that will cause the manager to approve the request. This task will generate a task for the employee that will reside in their Inbox.
  - c. They can click the **Deny** button to deny the request. The manager will enter a reason for the denial. This task will generate a notification that will be sent to the employee.

**NOTE:** All three buttons are located at the bottom of the page.



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### 7. Adjust and Override Time Off Balances

There are times when changes are needed to be made to an employee's time off balances. On rare occasions, there is a need to override (reset) totals and start the employee off with a new balance. More commonly, one-time adjustments are needed to correct issues or to make donations. In all cases, the **Payroll Partner** (formerly known as Payroll Rep) will enter these transactions. The following are the steps performed to process these types of transactions.

1. In the Search bar enter the employee's name that the Adjustment/Override transaction is to be posted to.
2. Once the employee's profile appears click the **Actions** button and scroll down to the **Time and Leave** option. While hovering over that option select the **Maintain Accrual and Time Off Adjustments/Overrides** menu item.
3. To enter an adjustment remain on the **Adjustments** tab. To enter an override first click on the **Overrides** tab.

**Note:** For the remainder of this section we will assume that an adjustment is being entered. The same steps can be used to process an override.

4. Click the plus sign in the upper-left portion of the grid to add a new row.
5. From the **Select Accrual/Time Off** column select the **Eligible As of Today** option and then select the appropriate option below to identify the category that best describes the adjustment.
6. Next, enter the number of hours being adjusted in the **Units** column.

**NOTE:** To add hours to an employee's accrual enter a positive number. To deduct hours from an employee's accrual enter a negative number.

7. In the **Period** column select the payroll cycle this adjustment is to be applied to.
8. Enter a comment to describe the reason for the adjustment.

**Note:** Please make it a point to always include a comment even though this field is not listed as a required field in Workday. The information will be used in the auditing of these transactions.

9. Click the **OK** button.
10. Click the **Done** button.



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### 8. Managers Submitting Employee Absence on Their Behalf

When an employee calls in (e.g. Sick Day), their manager/supervisor must enter the absence in Workday. All absence requests must be entered in Workday on or before the day of the absence. Typically, employees will enter their own absence requests, however, when they are unable to do so it is the manager/supervisor's responsibility to enter the absence on their behalf.

The following are the steps performed by a manager/supervisor to submit an absence request on behalf of one of their employees.

1. In the Search bar enter the employee's name who called in.
2. Click on the employee's name from the result set displayed.  
**Note:** This will take you to the employee's profile page.
3. On the left side of the Profile page in the blue section, click the **Absence** button.
4. Now click the **Add Absence** button toward the top of the page just to the right of the blue section.  
**Note:** This will display the employee's **Absence Calendar**. The number for Today's date will be displayed in blue.
5. Click on the day that the absence is for.  
**Note:** This will place a blue circle around the number listed for that day.
6. Click the **Request Absence** button in the bottom left corner of the page.  
**Note:** This will cause the **Select Absence Type** popup to display.
7. Select the appropriate type from the list provided (e.g. Sick).
8. Now click the **Next** button.  
**Note:** This will take you to the **Enter Absence** page. Here is where you will enter the details for the absence.
9. In the **Request** grid, click the **Edit Quantity per Day** button located on the right side of the page.  
**Note:** This will bring up the **Edit Quantity per Day** popup.



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10. Enter the appropriate **Start** and **End** times in the space provided.
11. Also, in the **Quantity per Day** field, enter the number of work hours the employee will be out of work based on the **Start** and **End** times entered previously.
12. To process the information entered, click the **Done** button.

**Note:** This will return you to the **Enter Absence** page.

**Note:** If "Sick" was the **Type** selected you will be required to select a **Reason**.

13. If the **Type** selected was sick, select the "Sick No Note" option in the **Reason** field.
14. In the **Comment** field, explain who submitted the **Absence Request** and why.
15. Click the **Submit** Button.

**Note:** This will return you to the **Absence Calendar** page and show the **Absence Request** you just submitted listed under the day selected.

**Note:** As the Manager/Supervisor is the one who approves such a request, Workday automatically approves the request when it is submitted.

**Important:** The Manager/Supervisor must review the employee's timesheet in case adjustments are required to offset the Absence submitted. To learn how to edit an employee's timesheet, please review the "Managers Updating an Employee's Timesheet" lesson in the [Time Entry Job Aid](#).

This completes the steps required for a Manager/Supervisor to submit an absence request on behalf of one of their employees.



