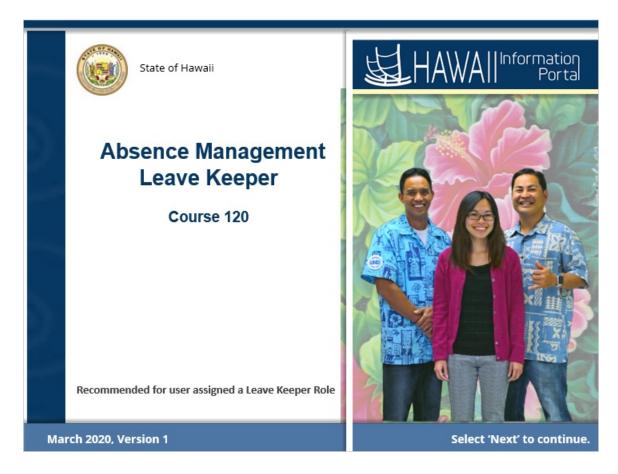


120 Absence Management - Leave Keeper





Duration



This course will take approximately 2 -3 hour.

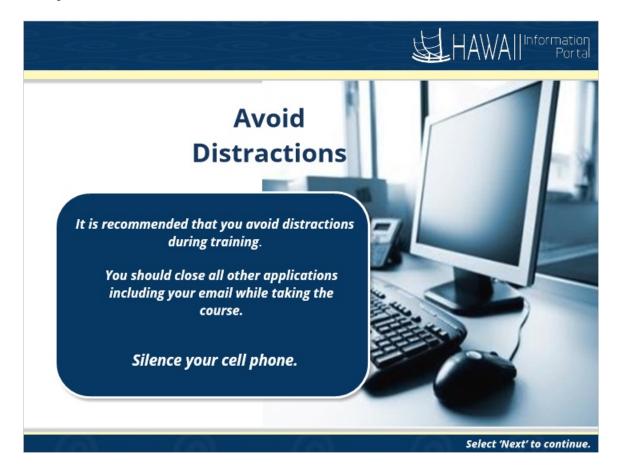
You can complete it all today or by sections.

It's really up to you!

You can take the training how it best fits in your schedule.



Preparation



It is recommended that you avoid distractions during your training session. You should close all other applications including your email while taking the course and silence your cell phone.



Help Desk Information



Hawaii Information Portal Service Center

If you need assistance using the Hawaii Information Portal Leave Keeper

- How-To Use the HIP Ticket System: http://ags.hawaii.gov/hip/files/2019/07/Using-the-HIP-Ticket-Center-042419.pdf
- HIP Ticket System: https://hipservice.hawaii.gov/s/
- HIP Security Access Request Form for Time/Leave & Payroll-Deployed Departments: https://docs.google.com/forms/d/e/1FAlpQLSdBn_vtESRUl0jMqCTfW0DaTObLafDLbrSl3i-TMqU0n2necw/viewform

Select 'Next' to continue.



- How-To Use the HIP Ticket System:
 - http://ags.hawaii.gov/hip/files/2019/07/Using-the-HIP-Ticket-Center-042419.pdf
- HIP Ticket System: https://hipservice.hawaii.gov/s/
- HIP Security Access Request Form for Time/Leave & Payroll-Deployed Departments:

https://docs.google.com/forms/d/e/1FAlpQLSdBn vtESRUl0jMqCTfW0DaTObLafDLbr Sl3i-TMqU0n2necw/viewform



Leave Keeper Activities



Course Objective
Key Terminology
Working with Absence Management
Monthly Calendar
Help Desk



Course Objectives

Course Objectives



After completing this course you will understand how to:

- Request an Absence as a Leave Keeper
- Cancel an Absence Request as a Leave Keeper
- Work with the Monthly Calendar



Select 'Next' to continue.

After completing this course you will understand how to:

Request an Absence as a Leave Keeper

Cancel an Absence Request as a Leave Keeper

Work with the Monthly Calendar



Key Terminology



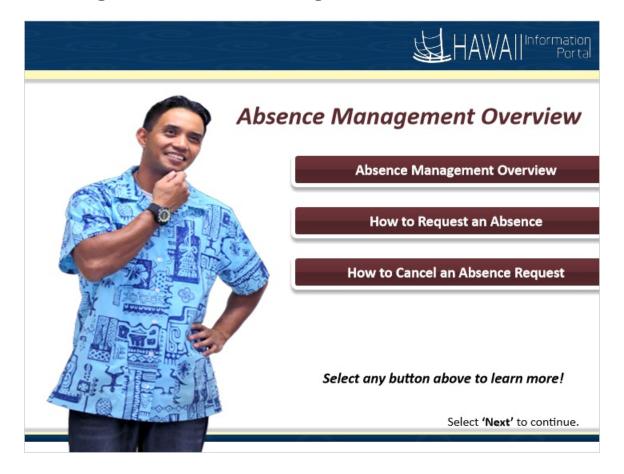
- Absence Reason A specific cause of absence that can be selected during absence recording. Note: Providing an absence reason for a regular absence is optional.
- Absence Request A request by an employee for time off for sick,
 vacation, military, bereavement or another life changing event.



- Absence Type A grouping of absences, such as illness or personal business that is used for reporting, accrual, and compensation calculations.
- Approval Absence An absence that has been approved by the Manager or Human Resource Administrator for the requested time off.
- Absence Forecasting A feature that allows the system to determine
 if there will be enough balance based on existing requests and
 entitlements.
- Leave Keeper An individual that manages absences on behalf of employees to maintain accurate reporting to management.
- Push Back Absence An absence that has been pushed back from the manager to request more information from the employee.
- Monthly Calendar (Workforce Availability) A feature that allows a manager or supervisor to monitor reported time and absences against an employee work schedules.



Working with Absence Management



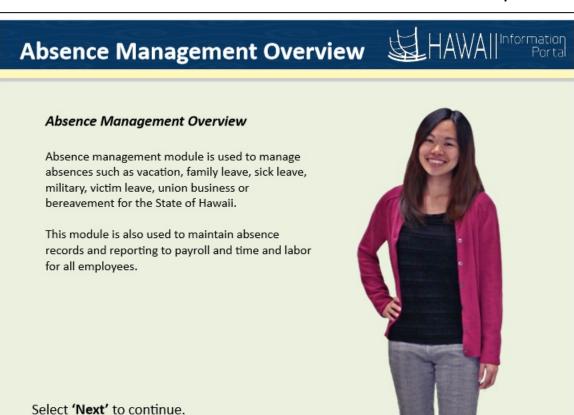
Absence Management Overview

Absence Management Overview

How to Request an Absence

How to Cancel an Absence Request





Absence Overview

Absence management module is used to manage absences such as vacation, family leave, sick leave, military, victim leave, union business or bereavement for the State of Hawaii.

This module is also used to maintain absence records and reporting to payroll and time and labor for all employees.

1.



How are Absences Entered?



Absences Entered Overview:

Employees:

Employee enters an absence using the Employee Self Service portal. The system will only allow absences that an employee is eligible to use. Once the absence is entered in the system, it will be submitted in the approval workflow.

Manager/Supervisor:

Manager/Supervisor have the authority to enter absences on behalf of their direct reports in the system. The absence will be auto-approved and then processed for paid or unpaid leave according to the eligibility of the employee.

Select 'Next' to continue.

How are Absences Entered?

Absences Entered Overview:

Employees:

Employee enters an absence using the Employee Self Service portal. The system will only allow absences that an employee is eligible to use. Once the absence is entered in the system, it will be submitted in the approval workflow.

Managers/Supervisor:

Managers have the authority to enter absences on behalf of their direct reports in the system. The absence will be auto-approved and then processed for paid or unpaid leave according to the eligibility of the employee.



Absences Approval Process



Steps for Approval:

- 1. The request is submitted in the HIP ESS.
- The Absence request is routed to the manager, supervisor or HR Admin based on the type of absence.
- Approvers have options to approve or push back the transaction.
- Approved Absence Requests are processed by the Absence Calculation Process.
- Absence hours are sent to the timesheet and processed as either paid or unpaid hours on the paycheck.

Select 'Next' to continue.



Absences Approval Process

Steps for Approval:

- 1. The request is submitted in the workflow approval process.
- 2. The Absence request is routed to the manager, supervisor or HR Admin based on the type of absence.
- 3. Approvers have options to approve or push back the transaction.
- 4. Approved Absence Requests are processed by the Absence Calculation Process.
- 5. Absence balances are updated to be sent to the time sheet and corresponding paid and unpaid elements are generated.



Roles and Responsibilities



This module is used by:

Employee to:

- Add, edit, forecast, submit, save and cancel absence request
- · View request details with approval status
- View request details entered by Absence Admin
- View absence events entered in time sheets
- · View absence entitlement balances
- View monthly calendar schedule for current and past months

Select 'Next' to continue.



Roles and Responsibilities

This module is used by:

Employee to:

- 2.Add, edit, forecast, submit, save and cancel absence request
- 3. View request details with approval status
- 4. View request details entered by Absence Admin
- 5. View absence events entered in time sheets
- 6. View absence entitlement balances
- 7. View monthly calendar schedule for current and past months



This module is used by: Manager/Supervisor to: Perform all employee self-service absence tasks on behalf of direct reports. May work with the Timekeeper or Leave Keeper to manage this task. View absence requests for direct reports Approve or push back absence request submitted by direct reports View a monthly calendar for direct reports Select 'Next' to continue.

This module is used by:

Manager/Supervisor to:

- Perform all employee self-service absence tasks on behalf of direct reports
- View absence requests for direct reports
- Approve or push back absence request submitted by direct reports
- View a monthly calendar for direct reports



This module is used by: Leave Keeper to: Maintain employee absences Manage absence exceptions Run absence reports Add, edit, submit, save and cancel absence request View Absence balances Select 'Next' to continue.

This module is used by:

Manager to:

- Perform all employee self-service absence tasks on behalf of direct reports
- View absence requests for direct reports
- Approve or push back absence request submitted by direct reports
- View a monthly calendar for direct reports



How are Absences Corrected? Absence Correction Process: 1. Managers can push back an absence to request additional information or suggest an absence request revision. 2. Absence Administrators have options to adjust employee balances if for any reason they are incorrect. 3. Balance Adjustments are performed by adjusting accumulators and absences. 4. Audit details of the transactions are captured when the adjustment transactions are completed. 5. Administrators can make adjustments to prior or current calendars. Select 'Next' to continue.

How are Absences Corrected?

Absence Correction Process:

- 1.Managers can push back an absence to request additional information or suggest an absence request revision.
- 2. Absence Administrators have options to adjust employee balances if for any reason they are incorrect.
- 3.Balance Adjustments is performed by adjusting accumulators and absences.
- 4. Audit details of the transactions are captured when the adjustment transactions are completed.
- 5. Administrator can make adjustments to prior or current calendars.



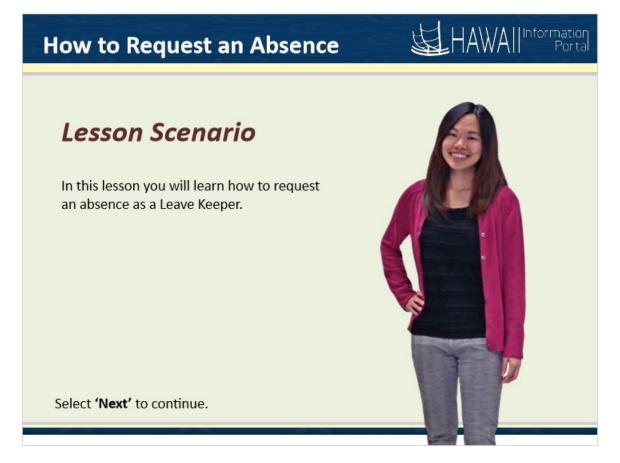


Congratulations!

You've successfully completed this lesson.



Request an Absence

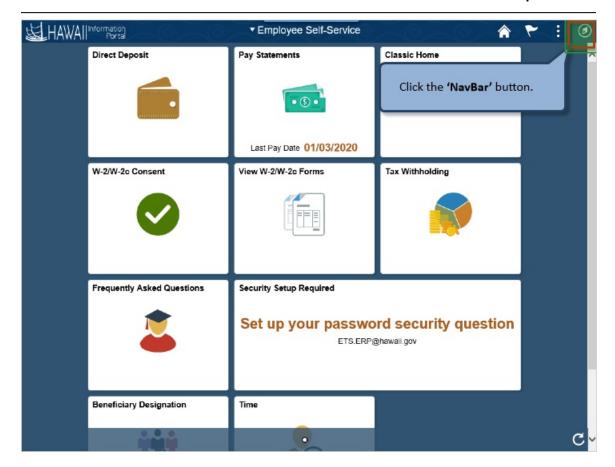


Lesson Scenario

In this lesson you will complete the following:

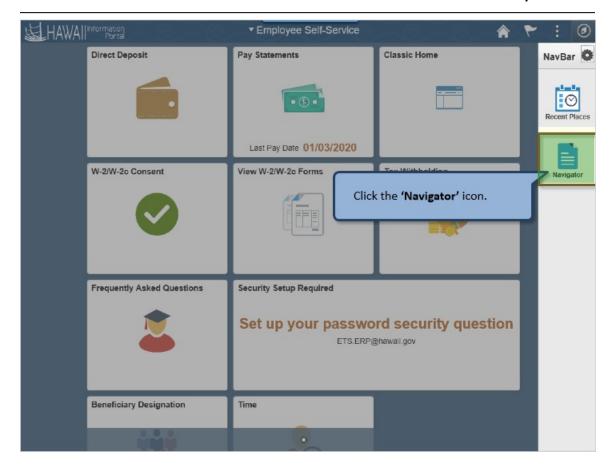
How to request an Absence. An employee was recently awarded a vacation gift in a local community drawing and needed to take time off from work to enjoy the leave with family and friends.





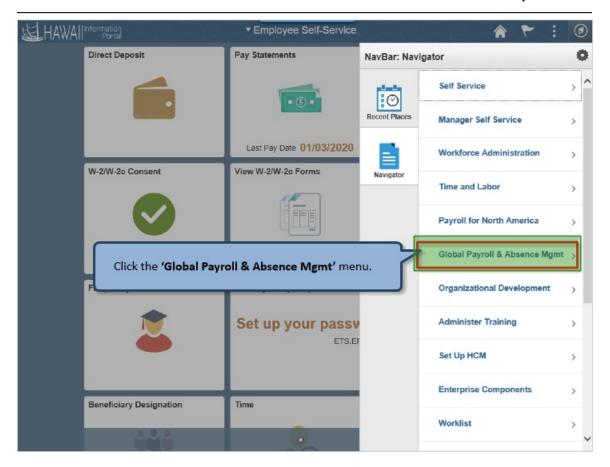
Click the 'NavBar' button.





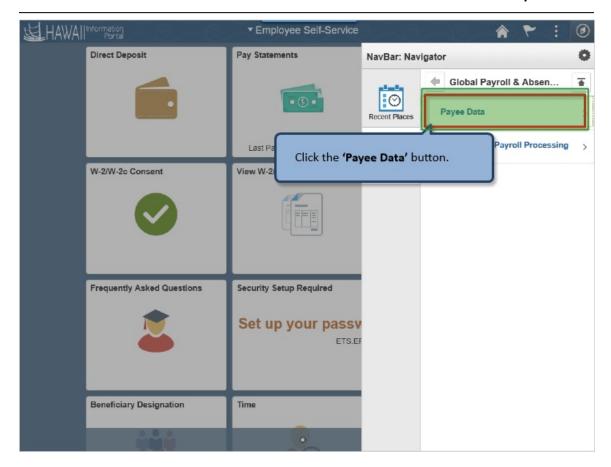
Click the 'Navigator' icon.





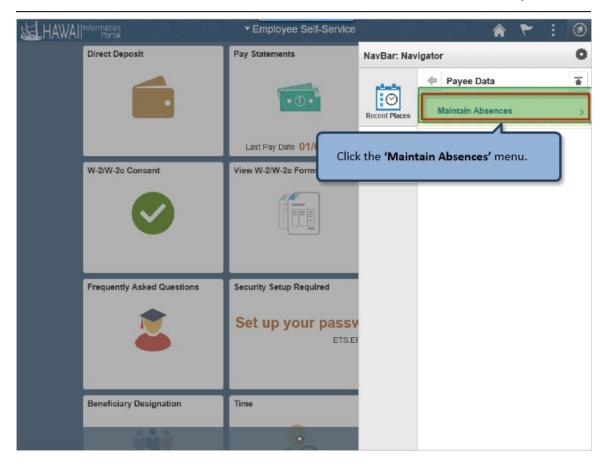
Click the 'Global Payroll & Absence Mgmt' menu.





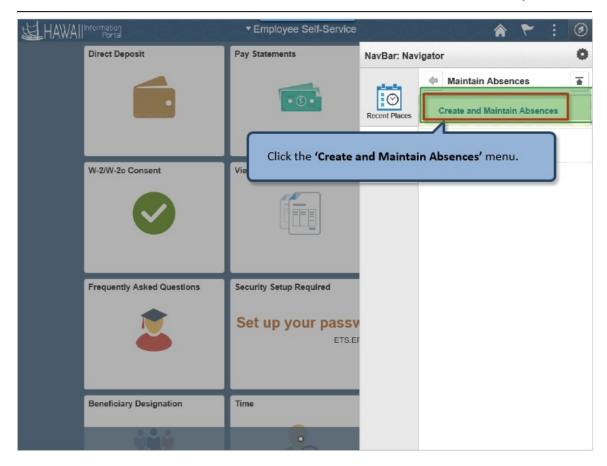
Click the 'Payee Data' button.





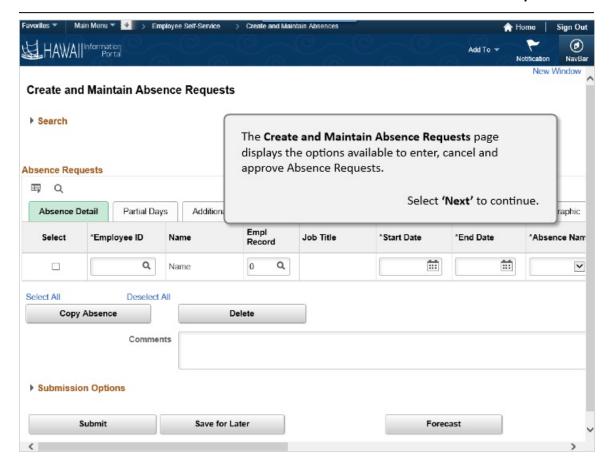
Click the 'Maintain Absences' menu.





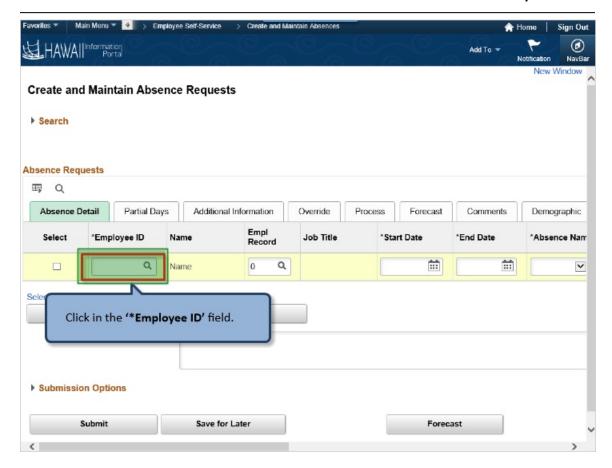
Click the 'Create and Maintain Absences' menu.





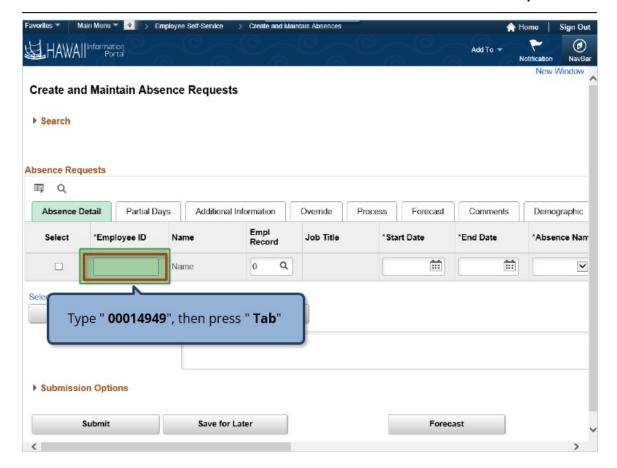
The **Create and Maintain Absence Requests** page displays the option available to enter, cancel and approve Absence Requests.





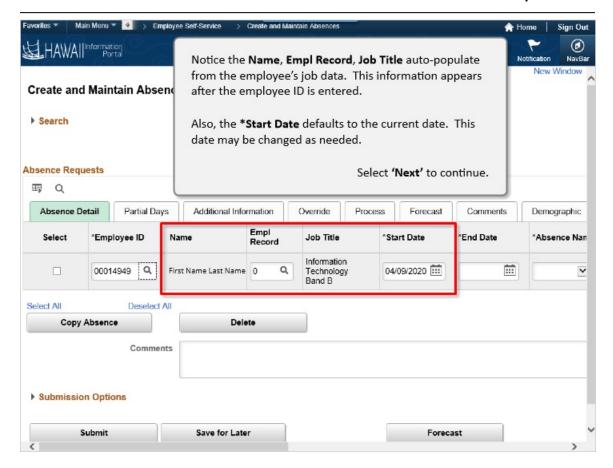
Click the **'*Employee ID'** field.





Type "00014949", then press "Tab"

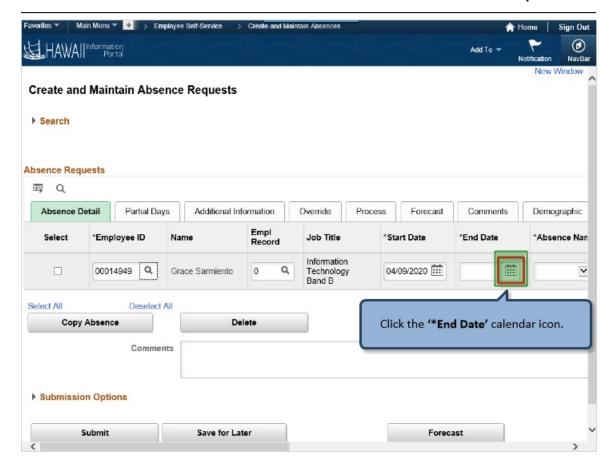




Notice the **Name**, **Empl Record**, **Job Title** auto-populate from the employee's job data. This information appears after the employee ID is entered.

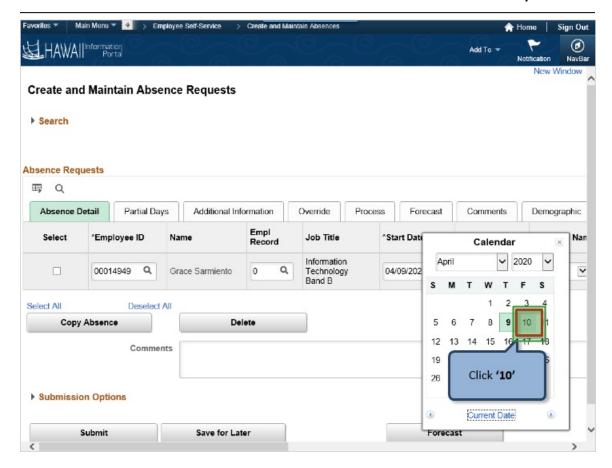
Also, the *Start Date defaults to the current date. This date may be changed as needed.





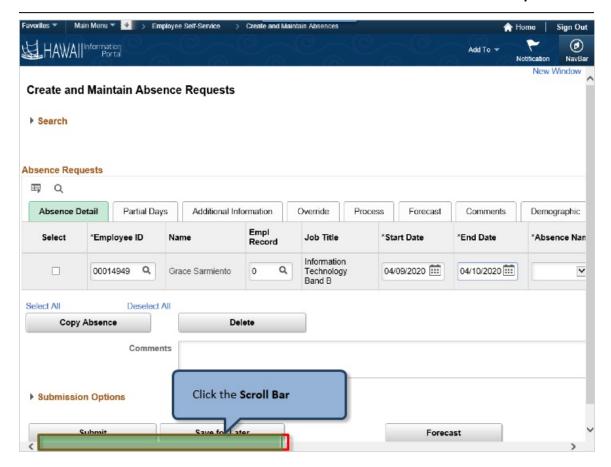
Click the 'End Date' calendar icon.





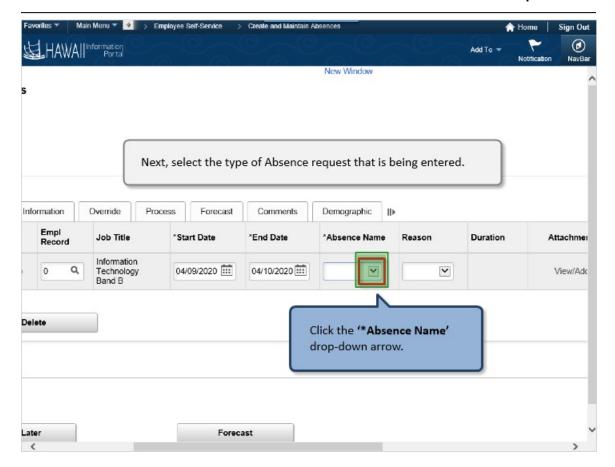
Click '10'





Click the scroll bar

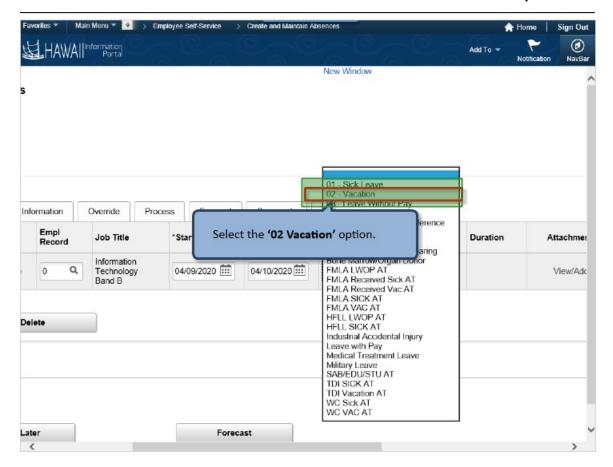




Next, select the type of Absence request that is being entered.

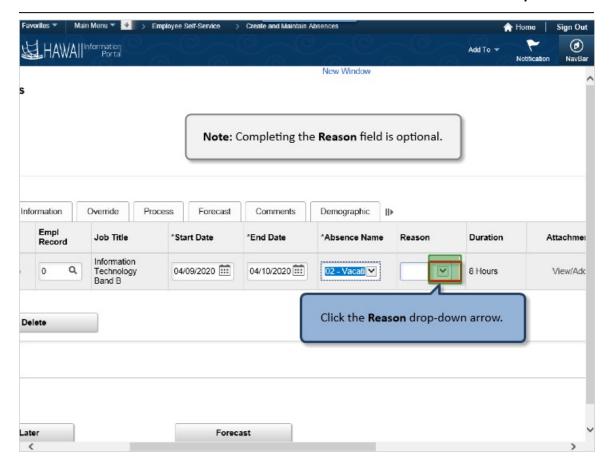
Click the **'*Absence Name'** drop-down arrow.





Select the '02 Vacation' option.

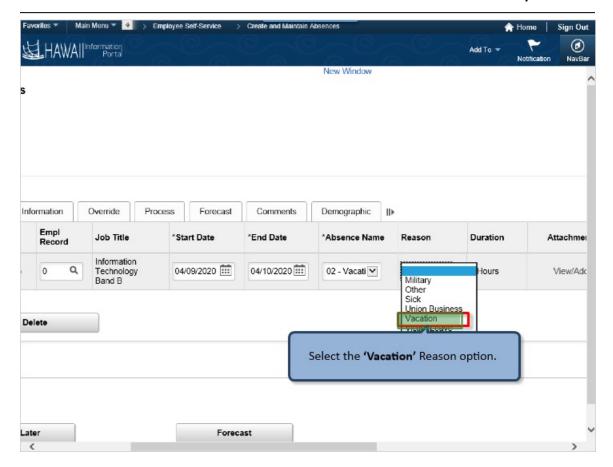




Note: Completing the Reason field is optional.

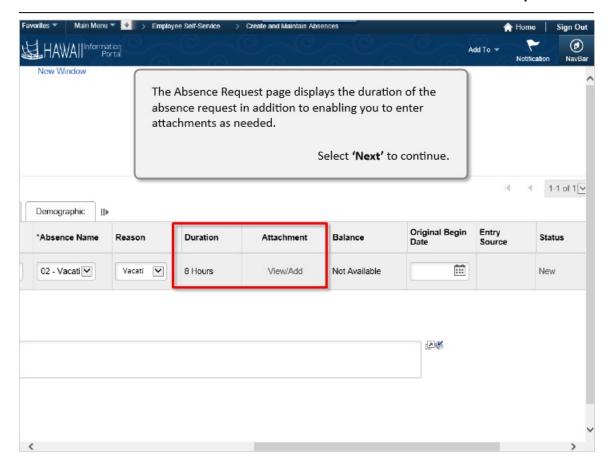
Click the **Reason** drop-down arrow.





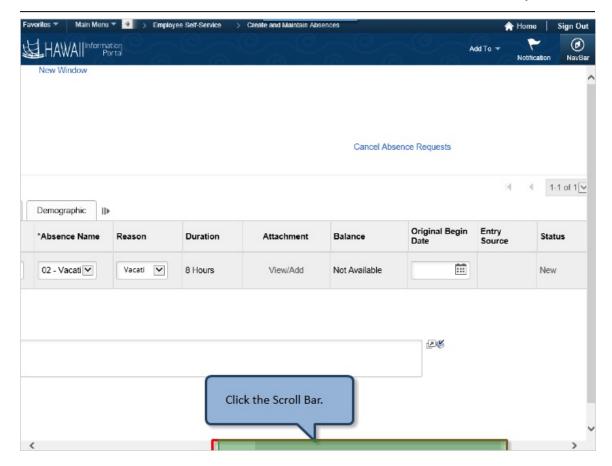
Select the 'Vacation' Reason option.





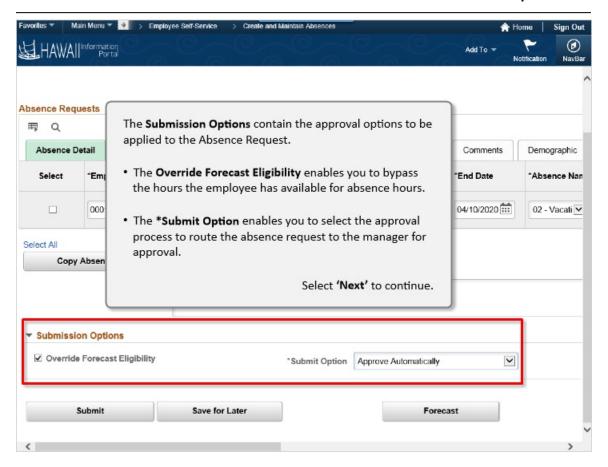
The Absence Request page displays the duration of the absence request in addition to enabling you to enter attachments as needed





Click the scroll bar

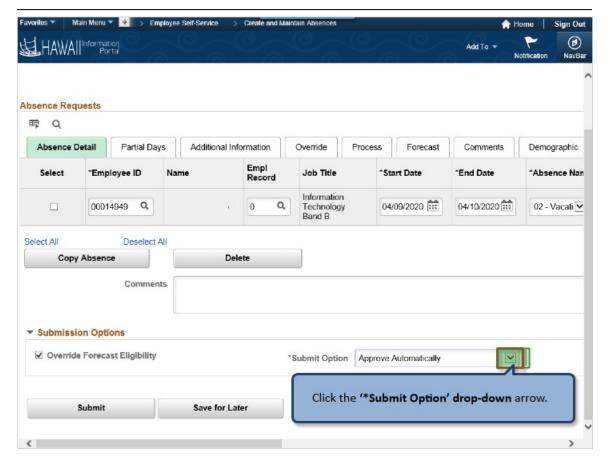




The **Submission Options** contain the approval options to be applied to the Absence Request.

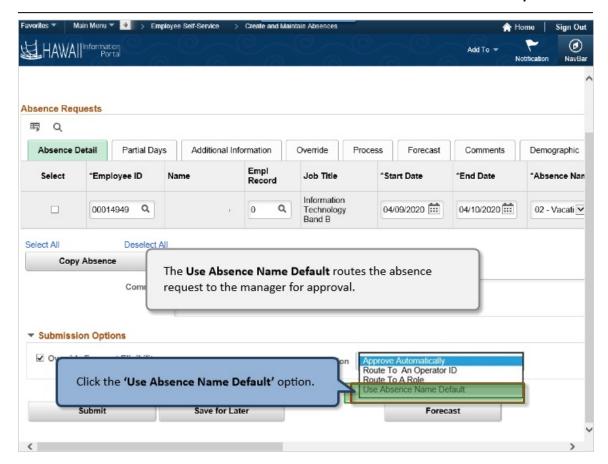
- The Override Forecast Eligibility enables you to bypass the hours the employee has available for absence hours.
- The *Submit Option enables you to select the approval process to route the absence request to the manager for approval.





Click the 'Submit Option' drop-down arrow.

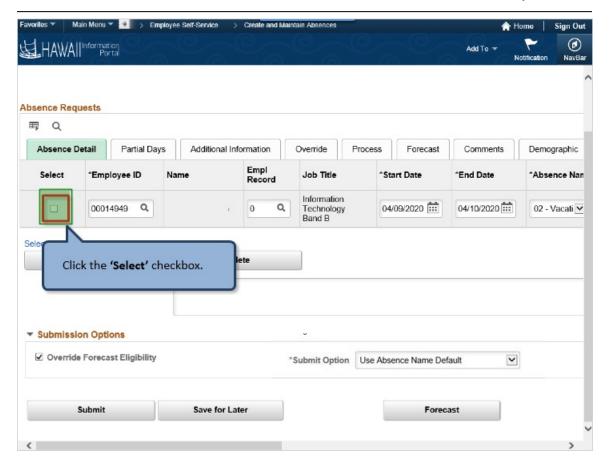




The **Use Absence Name Default** routes the absence request to the manager for approval.

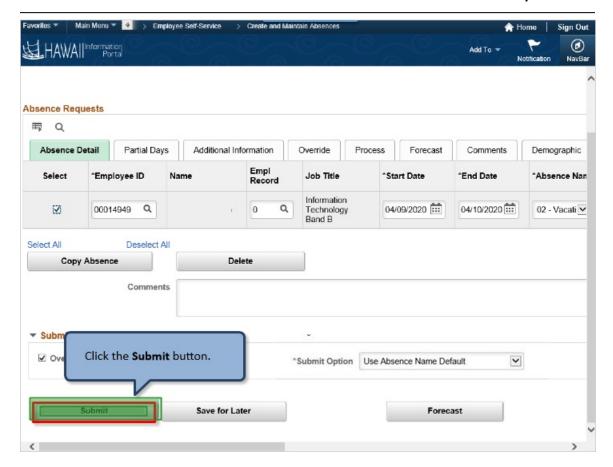
Click the 'Use Absence Name Default' option.





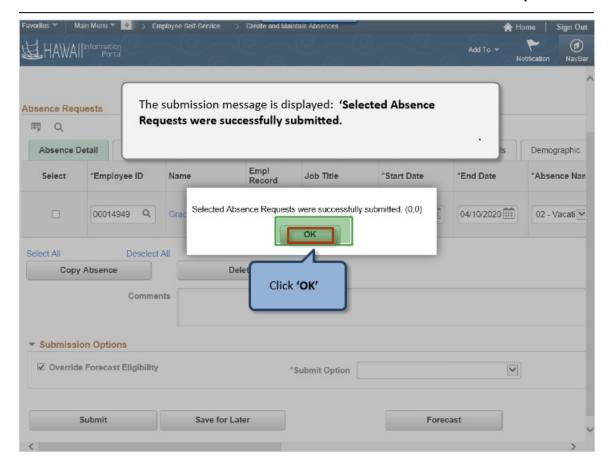
Click the 'Select' checkbox.





Click the **Submit** button.





The submission message is displayed: 'Selected Absence Requests were successfully submitted'

Click 'OK'



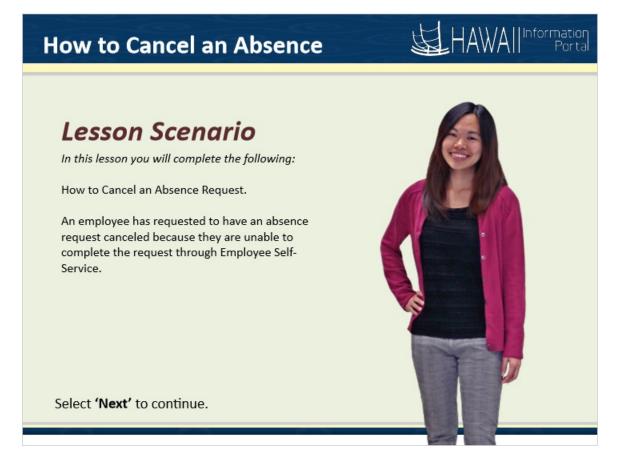


Congratulations!

You've successfully completed this lesson.



Cancel an Absence Request

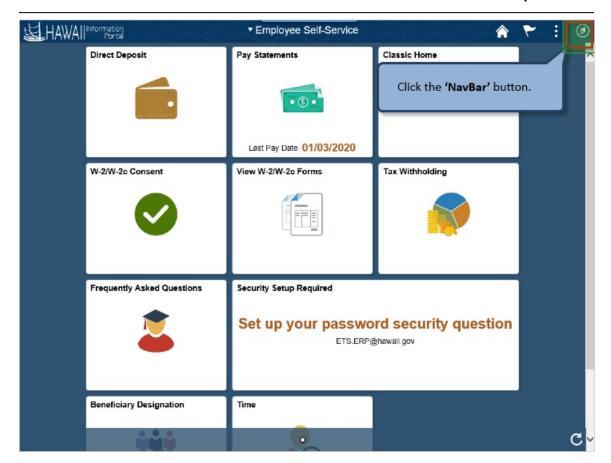


Lesson Scenario

In this lesson you will complete the following:

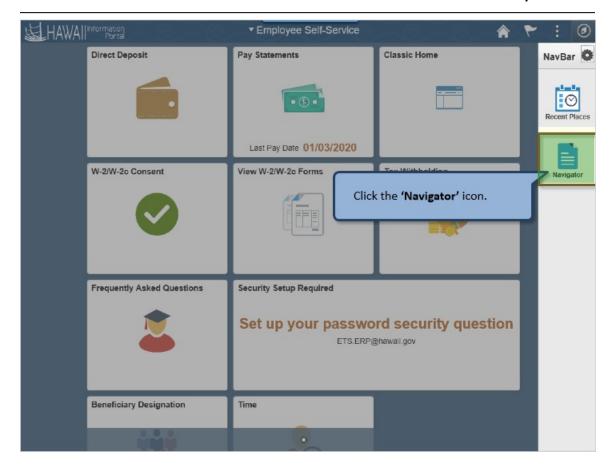
How to modify/cancel an Absence Request. You recently remembered that the original absence submitted has the incorrect dates. This requires you to cancel the absence request.





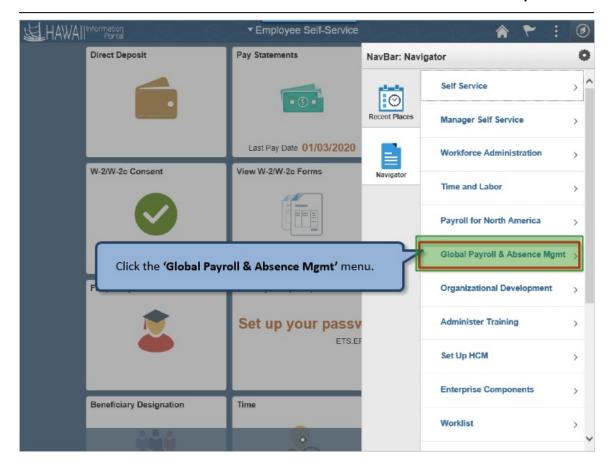
Click the 'NavBar' button





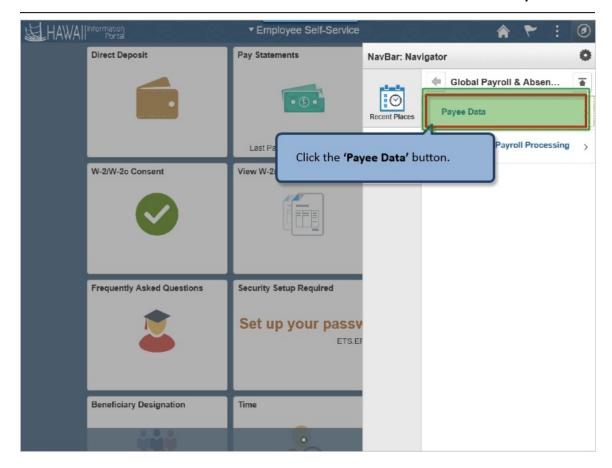
Click the 'Navigator' icon.





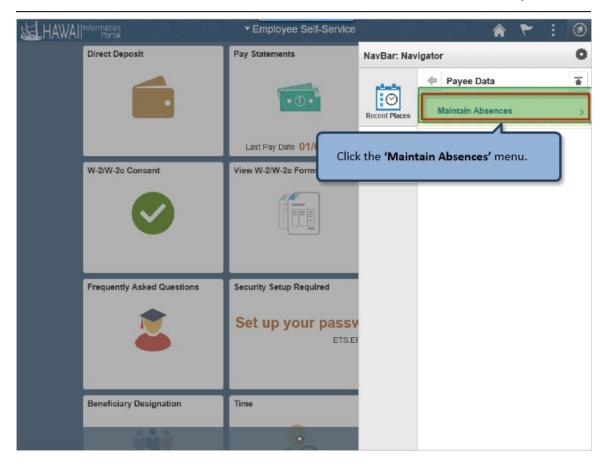
Click the 'Global Payroll & Absence Mgmt' menu.





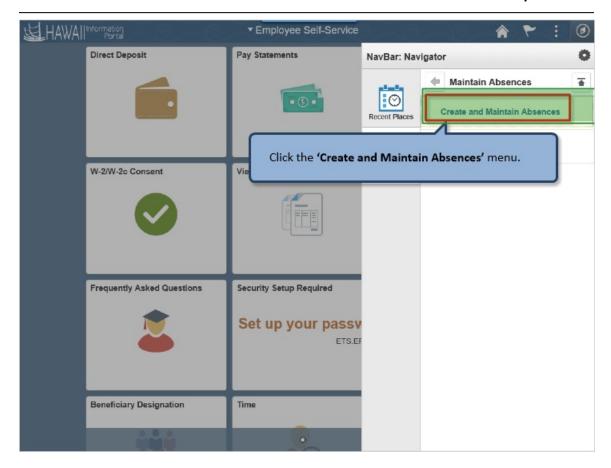
Click the 'Payee Data' button.





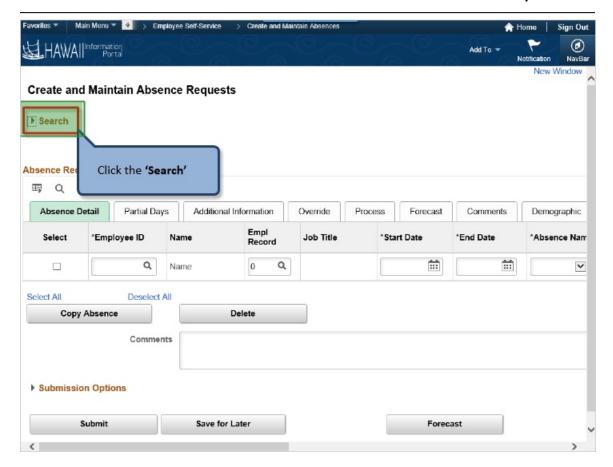
Click the 'Maintain Absences' menu.





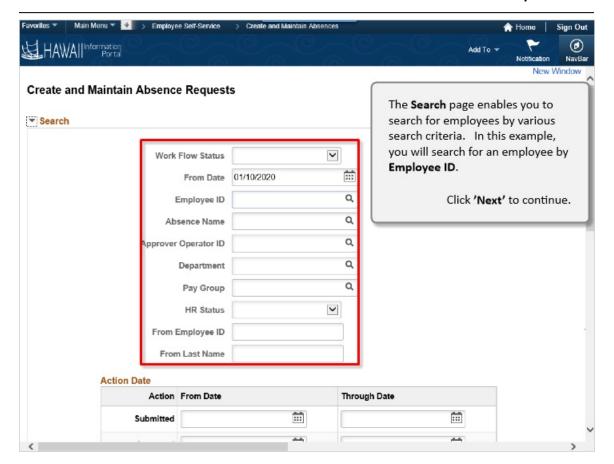
Click the 'Create and Maintain Absences' menu.





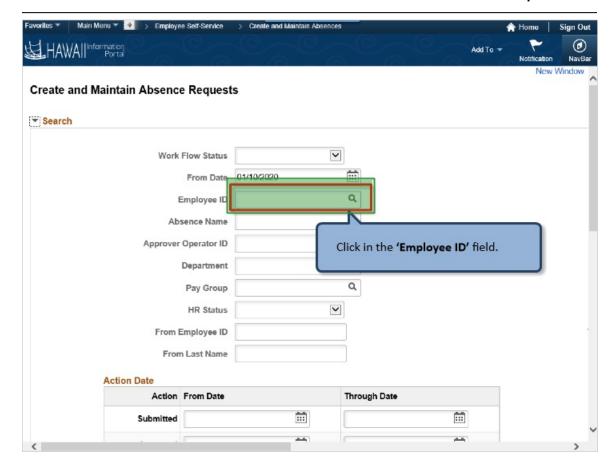
Click the 'Search'





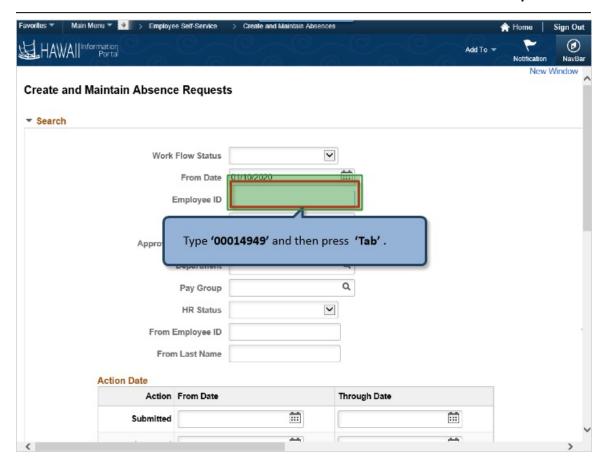
The **Search** page enables you to search for employees by various search criteria. In this example, you will search for an employee by **Employee ID**.





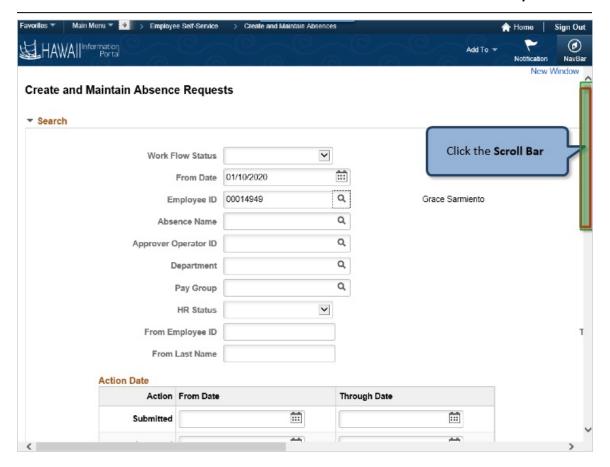
Click in the 'Employee ID' field.





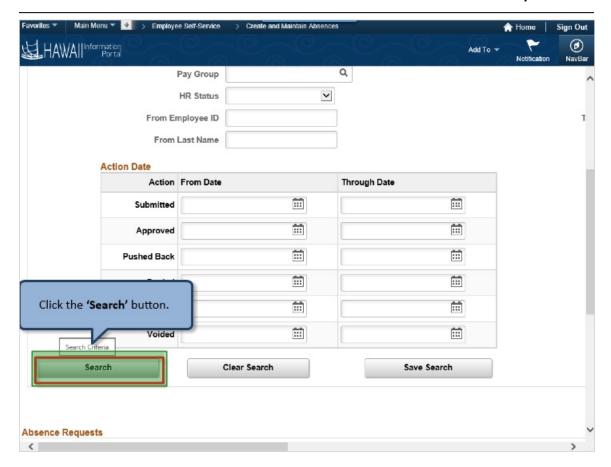
Click '00014949' and then press 'Tab'





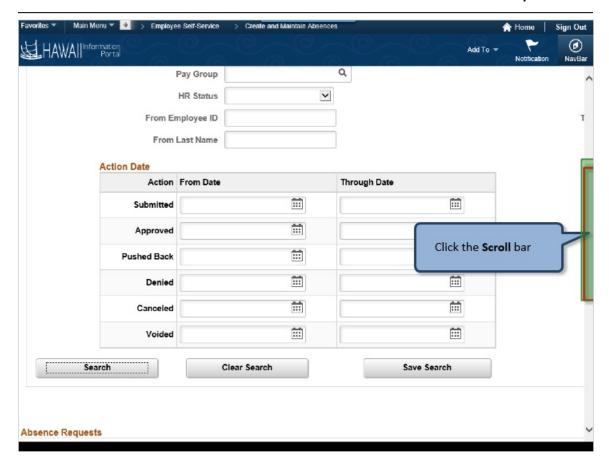
Click the Scroll Bar





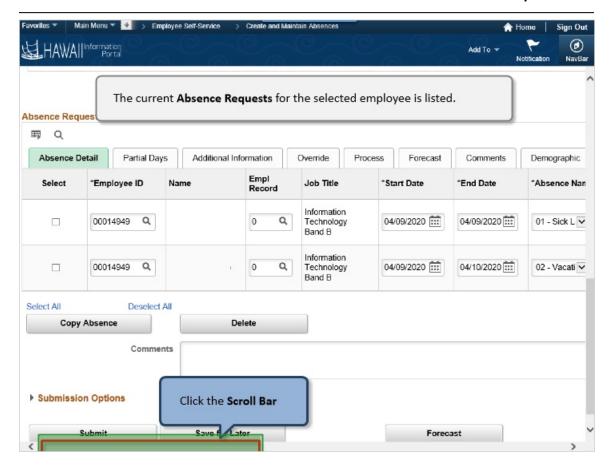
Click the 'Search' button.





Click the **Scroll** bar.

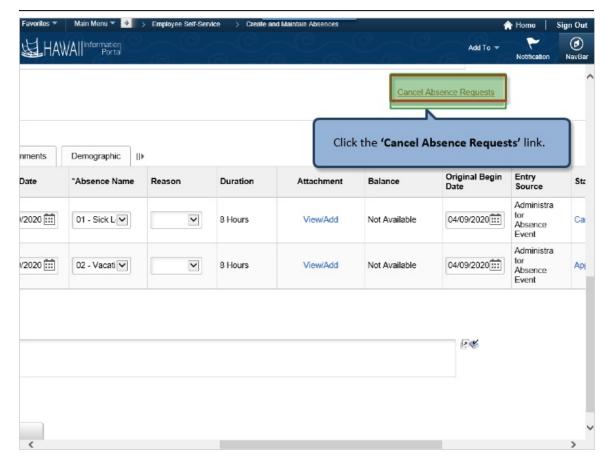




The current Absence Requests for the selected employee is listed.

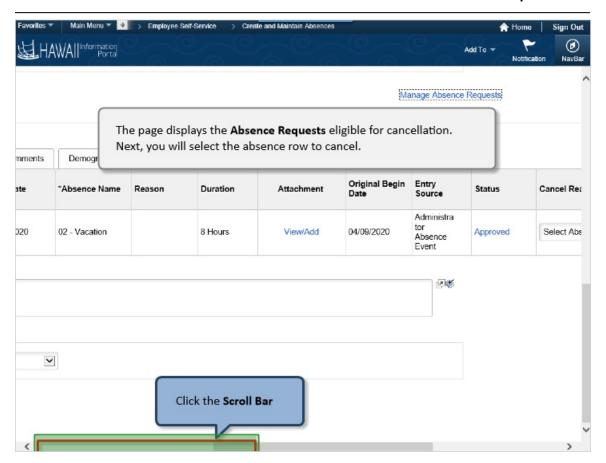
Click the Scroll Bar.





Click the 'Cancel Absence Requests' link.

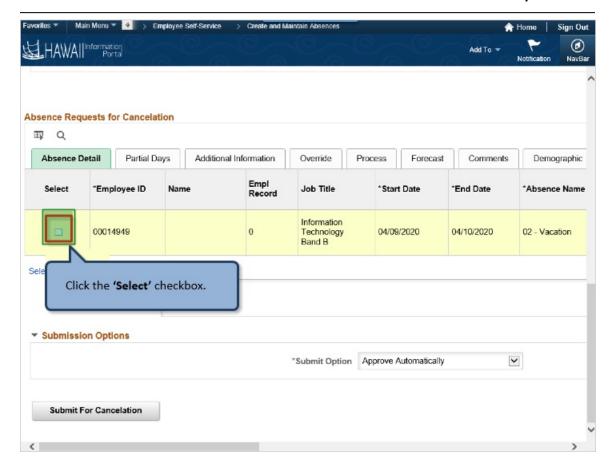




The page displays the **Absence Requests** eligible for cancellation. Next, you will select the absence row to cancel.

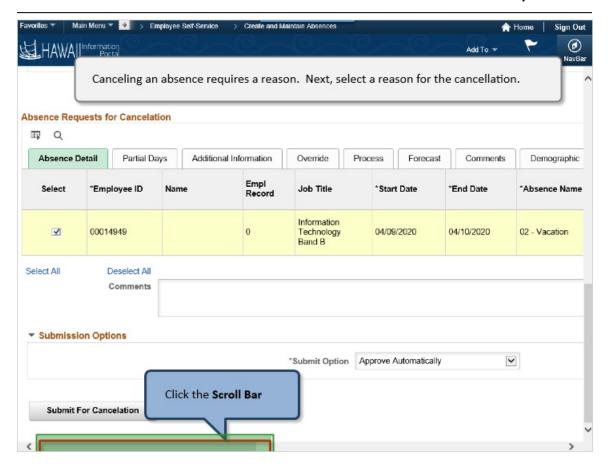
Click the Scroll Bar





Click the 'Select' checkbox.

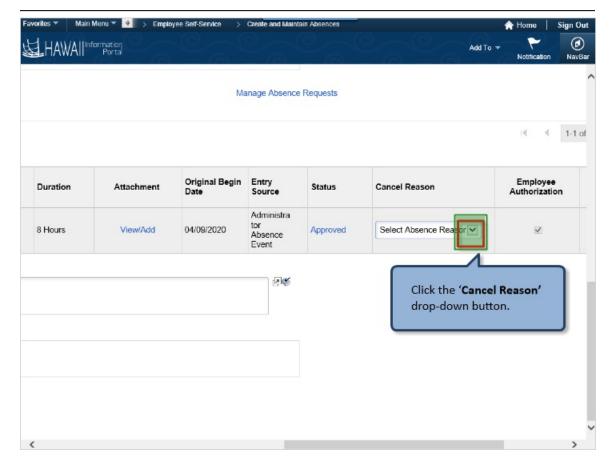




Canceling an absence requires a reason. Next, select a reason for the cancellation.

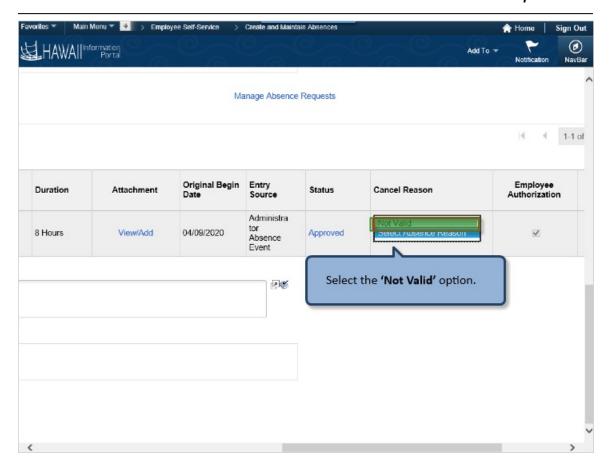
Click the Scroll Bar.





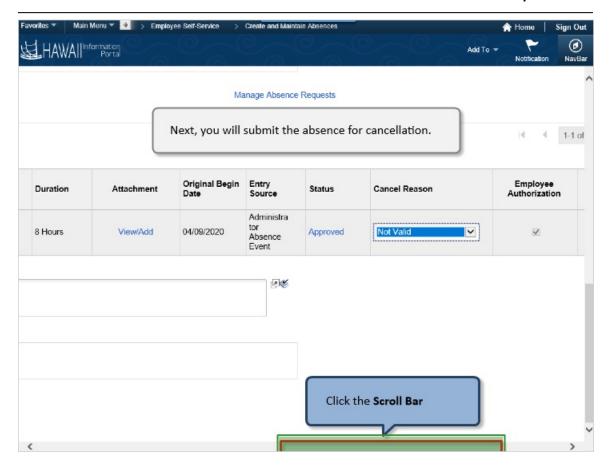
Click the 'Cancel Reason' drop-down button.





Select the 'Not Valid' option.

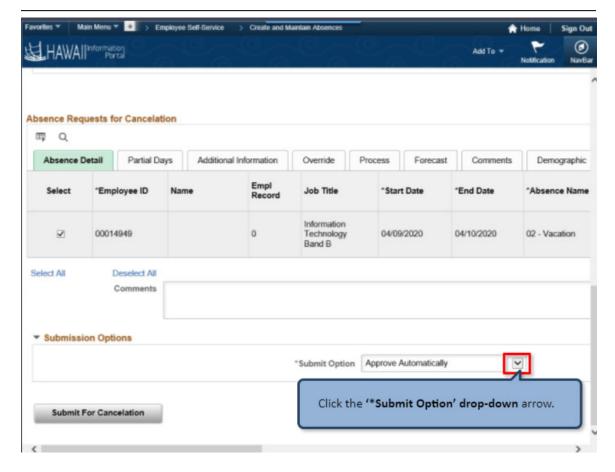




Next, you will submit the absence for cancellation.

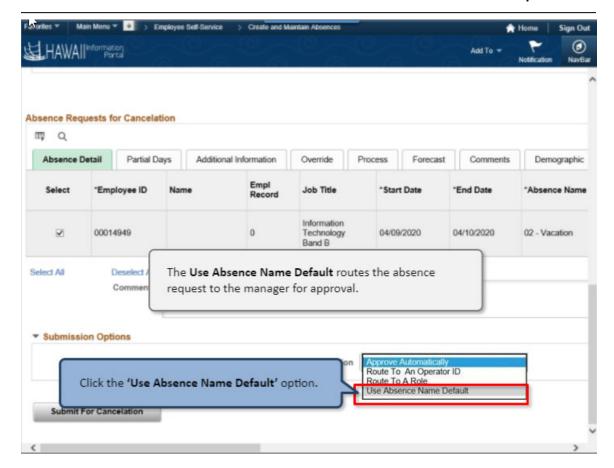
Click the scroll bar.





Click the "*Submit Option' drop-down arrow.

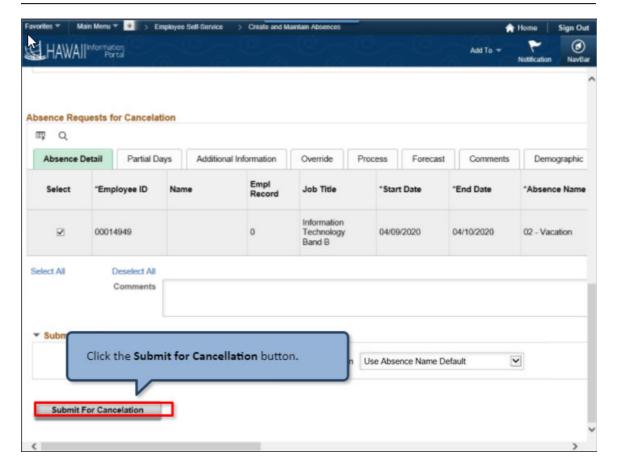




The **Use Absence Name Default** routes the absence request to the manager for approval.

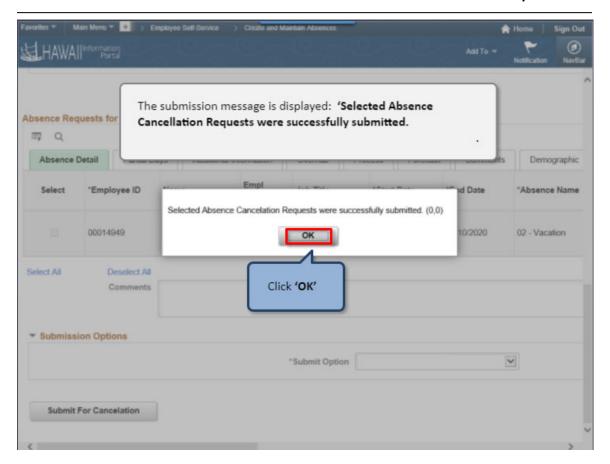
Click the 'Use Absence Name Default' option.





Click the 'Submit for Cancellation' button.





The submission message is displayed: 'Selected Absence Cancellation Requests were successfully submitted'.

Click 'OK'



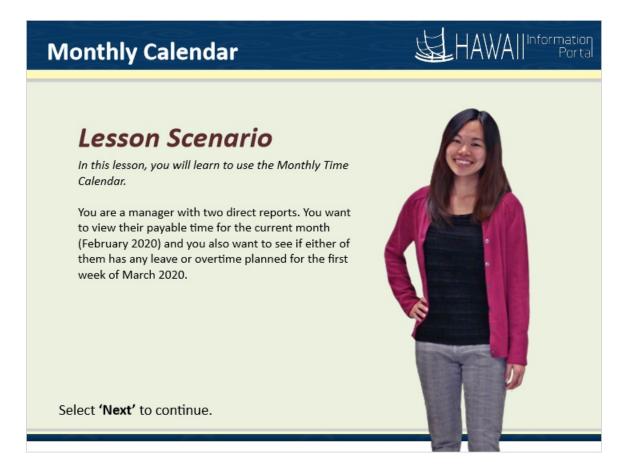


Congratulations!

You've successfully completed this lesson.



Monthly Calendar

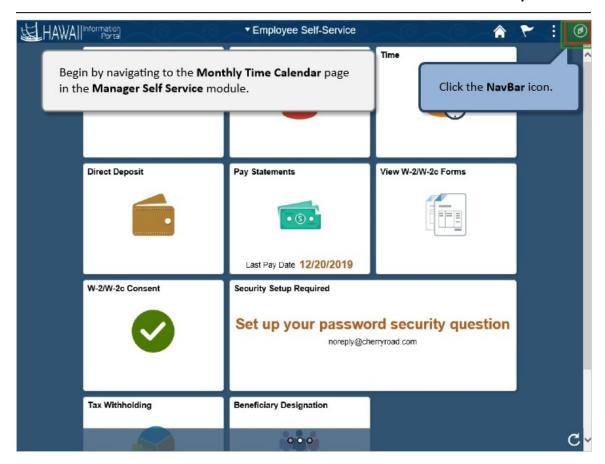


Lesson Scenario

In this lesson, you will learn to use the Monthly Time Calendar.

You are a manager with two direct reports. You want to view their payable time for the current month (February 2020) and you also want to see if either of them has any leave or overtime planned for the first week of March 2020.

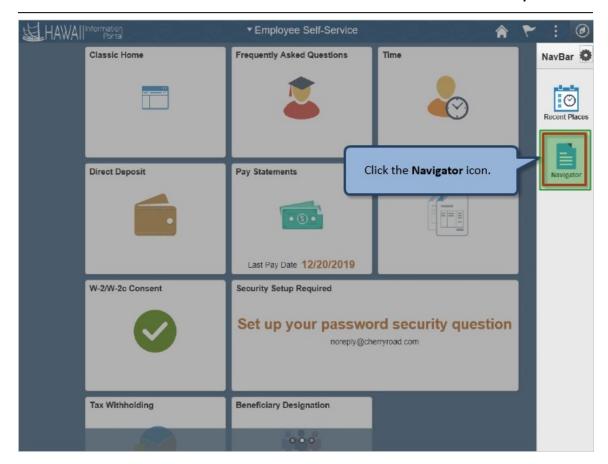




Begin by navigating to the **Monthly Time Calendar** page in the **Manager Self Service** module.

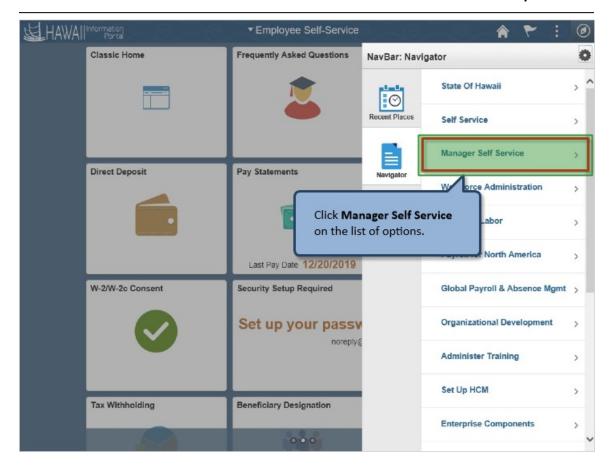
Click the NavBar icon.





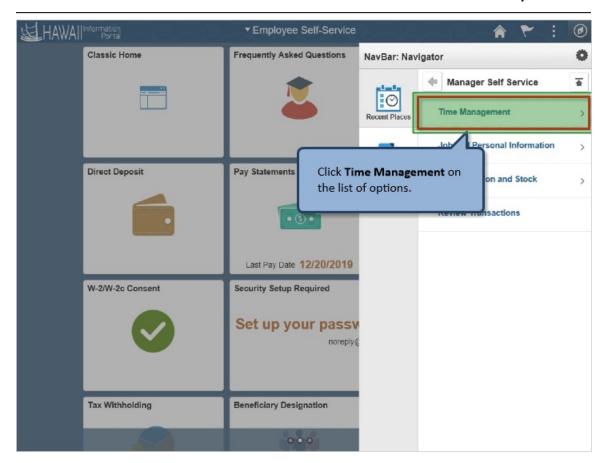
Click the **Navigator** icon.





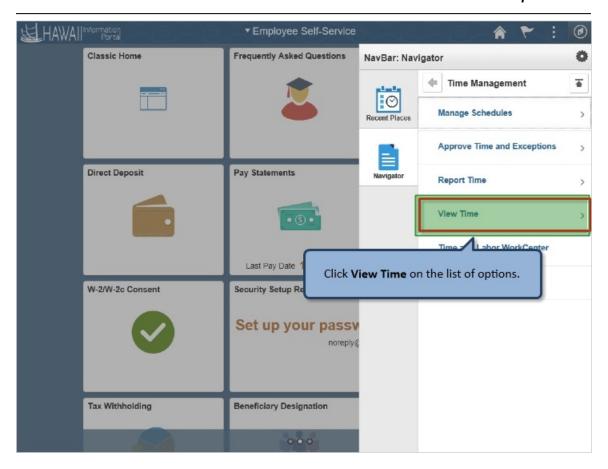
Click Manager Self Service on the list of options.





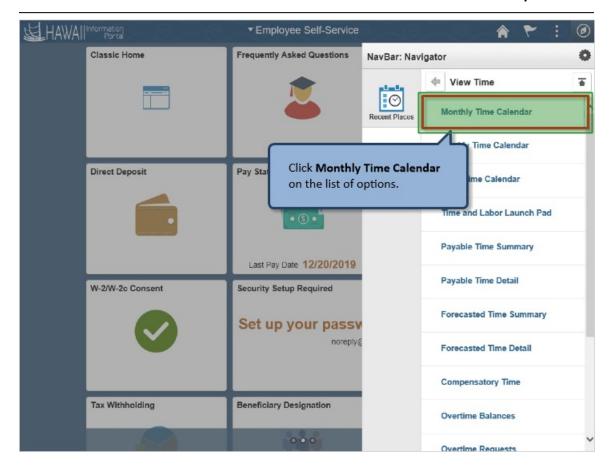
Click Time Management on the list of options.





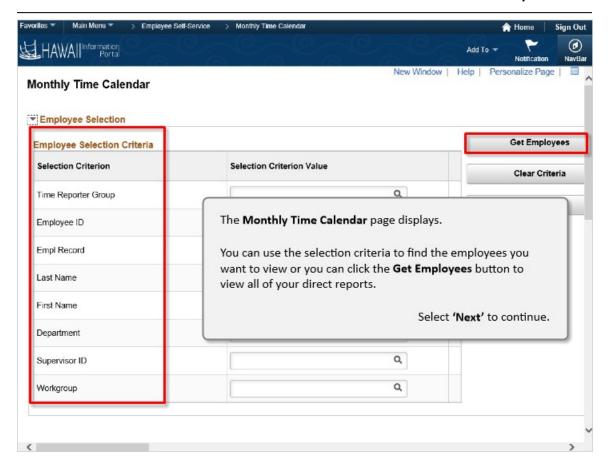
Click View Time on the list of options.





Click Monthly Time Calendar on the list of options.

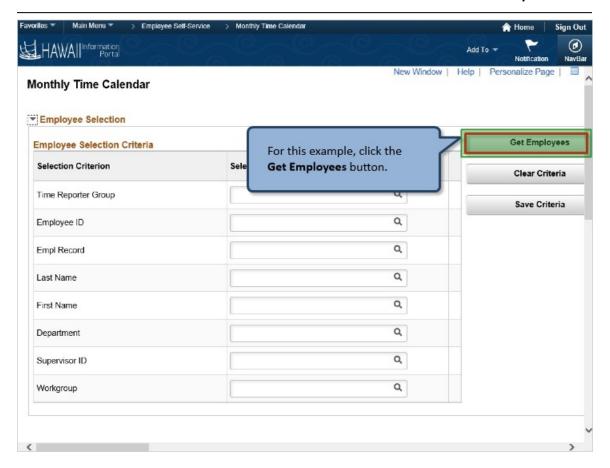




The Monthly Time Calendar page displays.

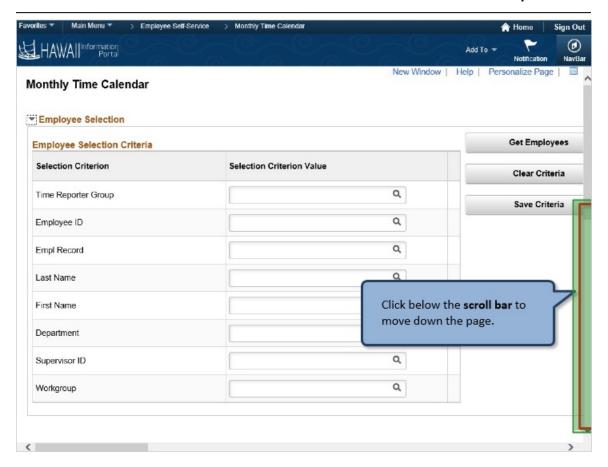
You can use the selection criteria to find the employees you want to view or you can click the **Get Employees** button to view all of your direct reports.





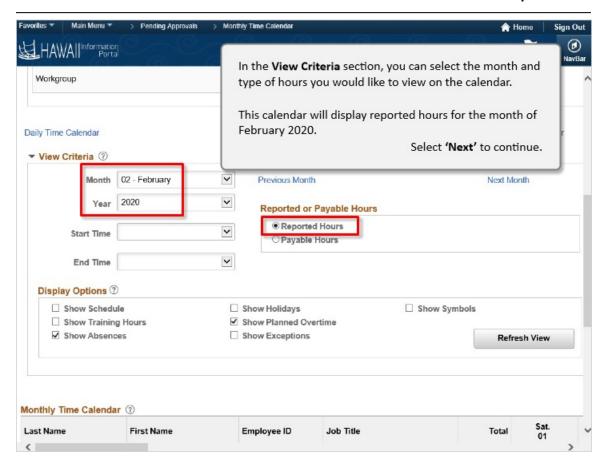
For this example, click the **Get Employees** button.





Click below the **scroll bar** to move down the page.

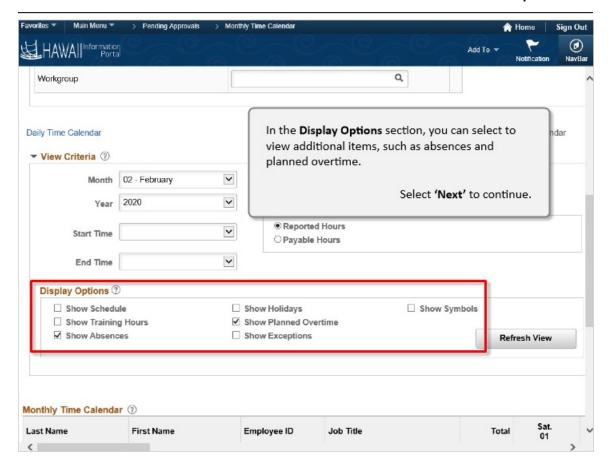




In the **View Criteria** section, you can select the month and type of hours you would like to view on the calendar.

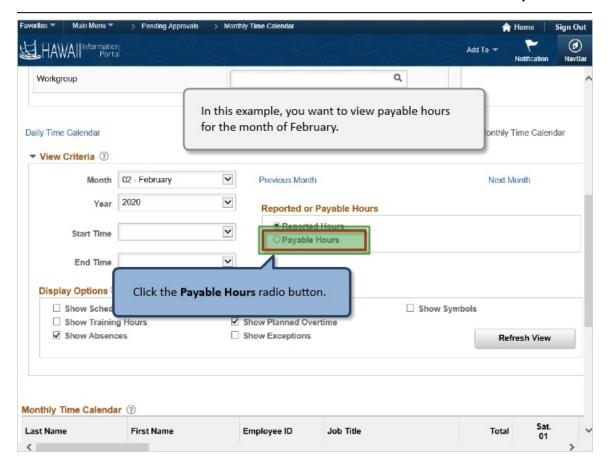
This calendar will display reported hours for the month of February 2020.





In the **Display Options** section, you can select to view additional items, such as absences and planned overtime.

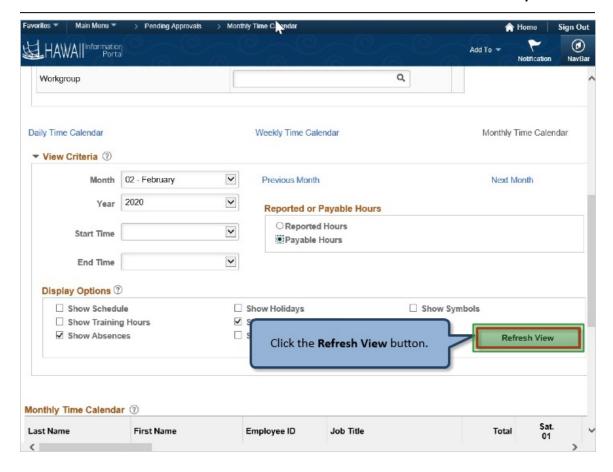




In this example, you want to view payable hours for the month of February.

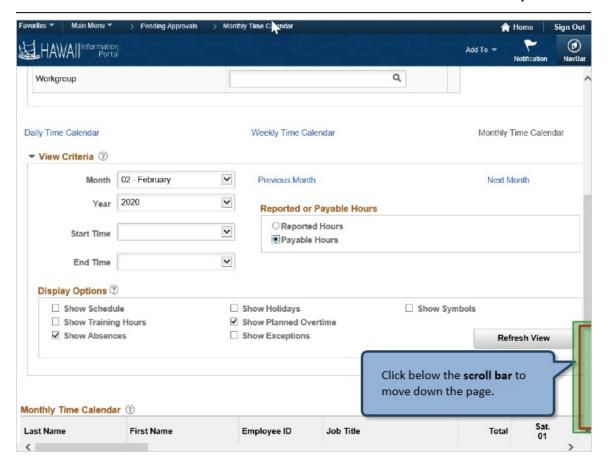
Click the Payable Hours radio button.





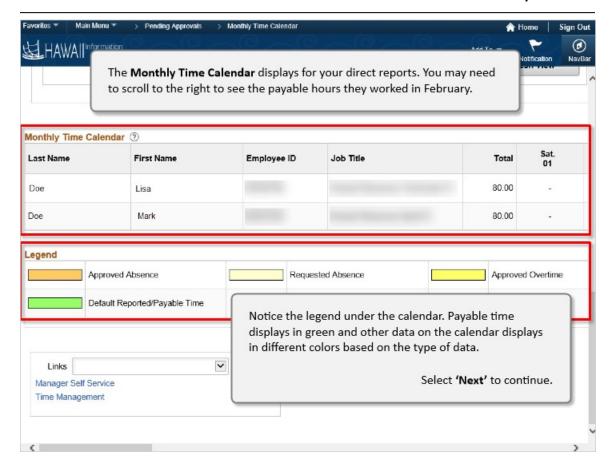
Click the Refresh View button.





Click below the **scroll bar** to move down the page.

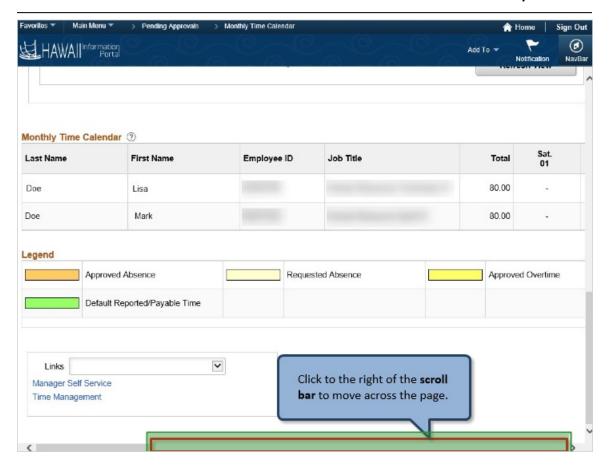




The **Monthly Time Calendar** displays for your direct reports. You may need to scroll to the right to see the payable hours they worked in February.

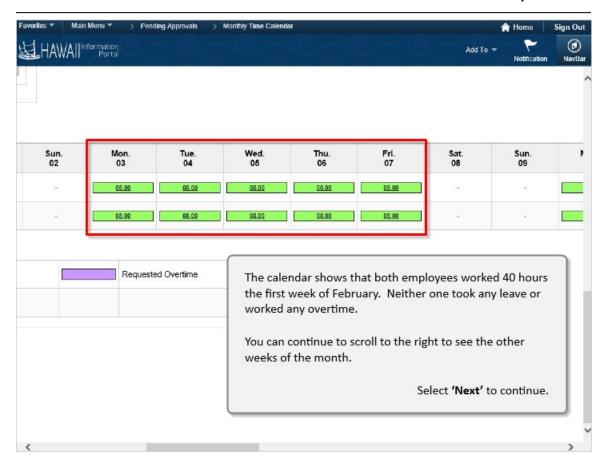
Notice the legend under the calendar. Payable time displays in green and other data on the calendar displays in different colors based on the type of data.





Click to the right of the **scroll bar** to move across the page.

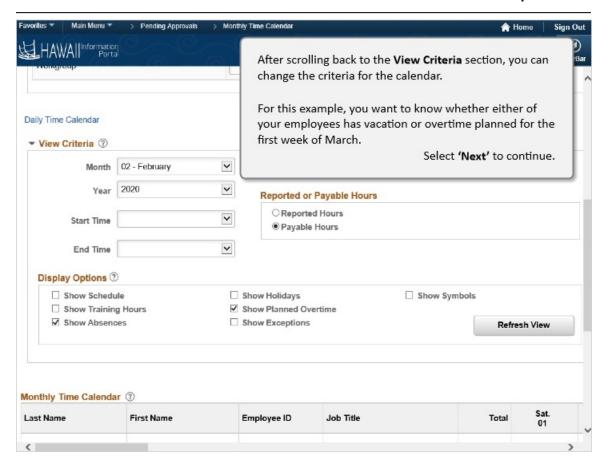




The calendar shows that both employees worked 40 hours the first week of February. Neither one took any leave or worked any overtime.

You can continue to scroll to the right to see the other weeks of the month.

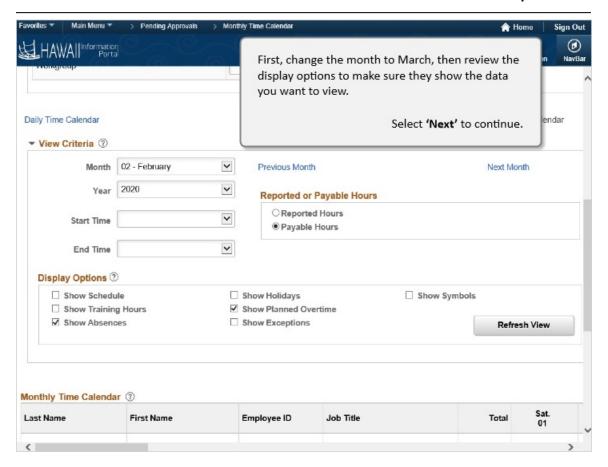




After scrolling back to the **View Criteria** section, you can change the criteria for the calendar.

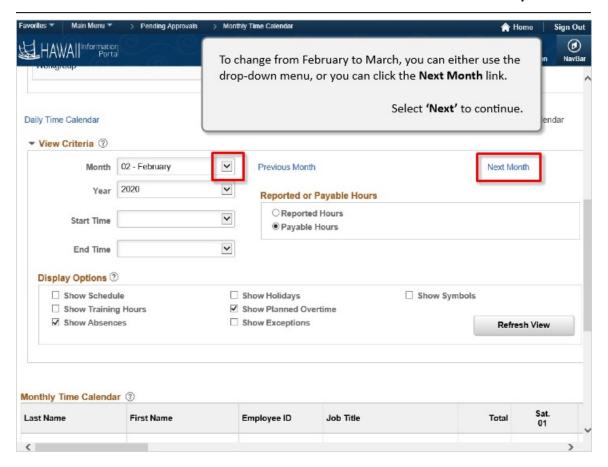
For this example, you want to know whether either of your employees has vacation or overtime planned for the first week of March.





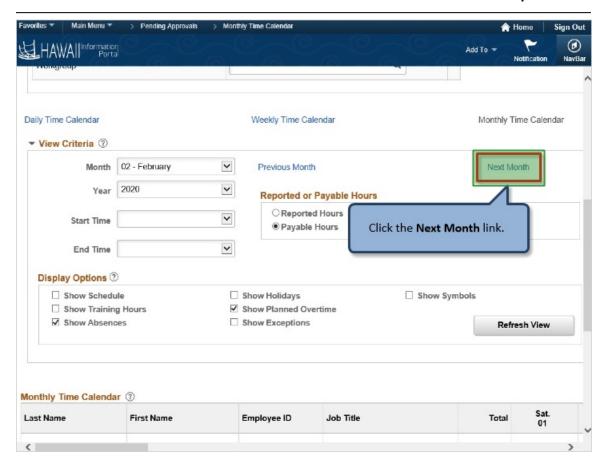
First, change the month to March, then review the display options to make sure they show the data you want to view.





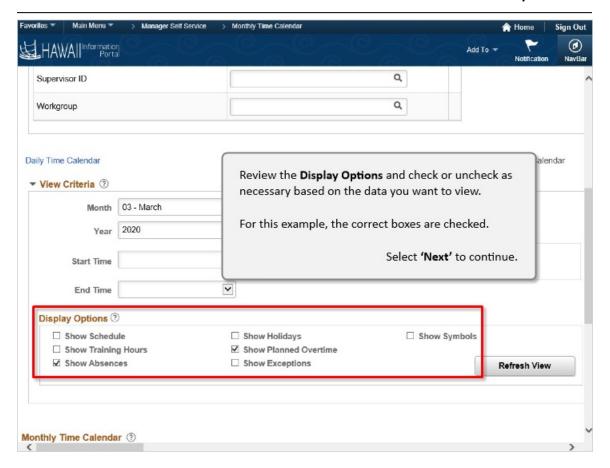
To change from February to March, you can either use the drop-down menu, or you can click the **Next Month** link.





Click the Next Month link.

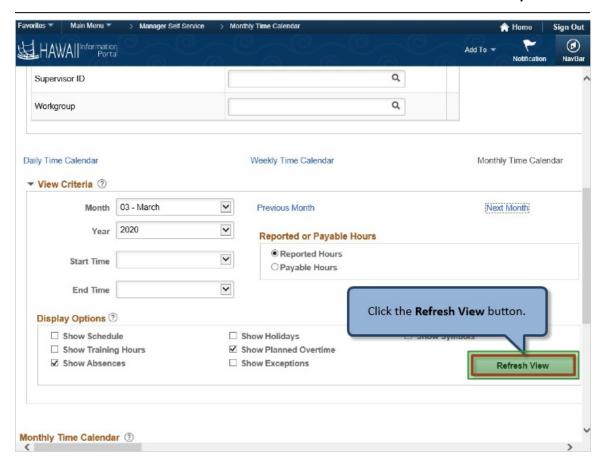




Review the **Display Options** and check or uncheck as necessary based on the data you want to view.

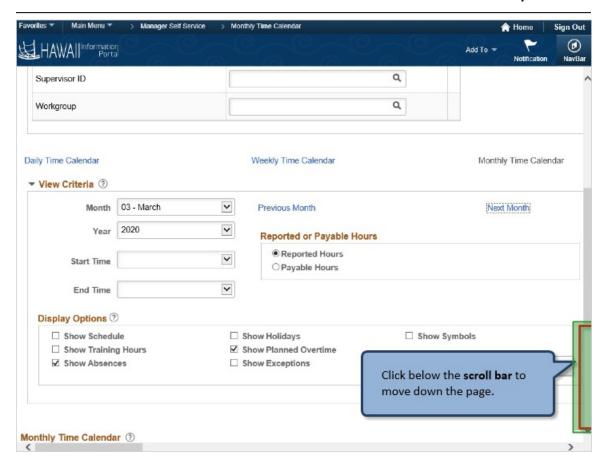
For this example, the correct boxes are checked.





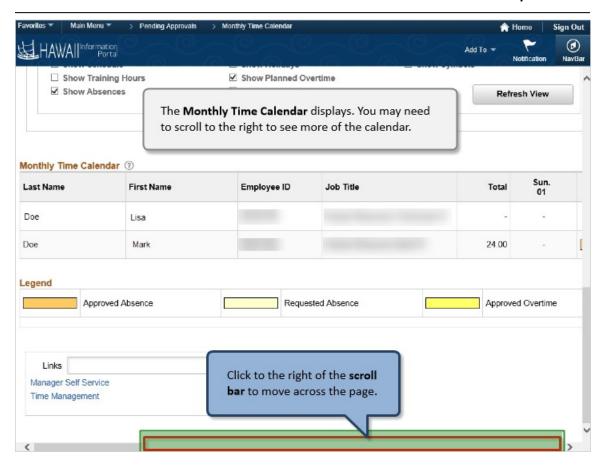
Click the Refresh View button.





Click below the scroll bar to move down the page.

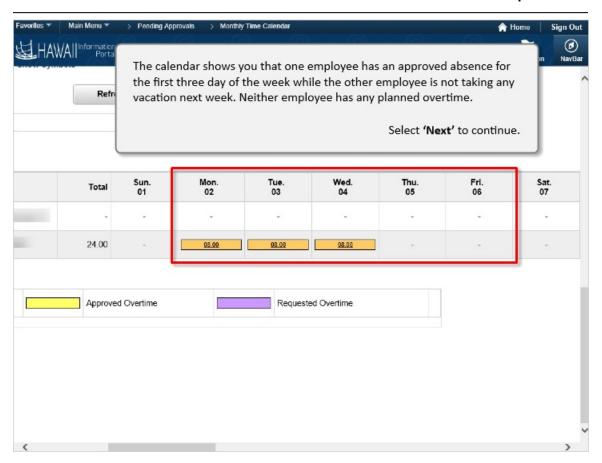




The Monthly Time Calendar displays. You may need to scroll to the right to see more of the calendar.

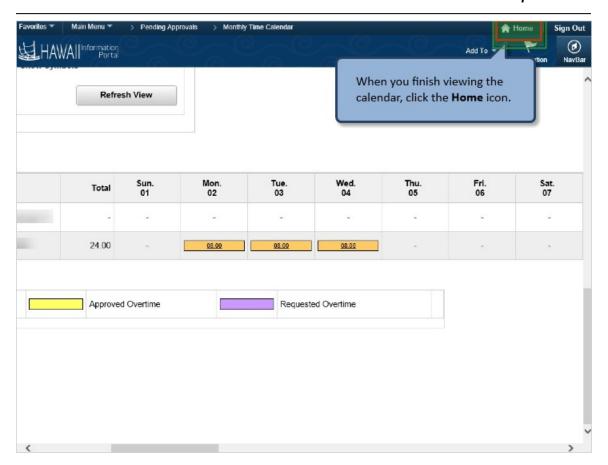
Click to the right of the **scroll bar** to move across the page.





The calendar shows you that one employee has an approved absence for the first three day of the week while the other employee is not taking any vacation next week. Neither employee has any planned overtime.





When you finish viewing the calendar, click the **Home** icon.



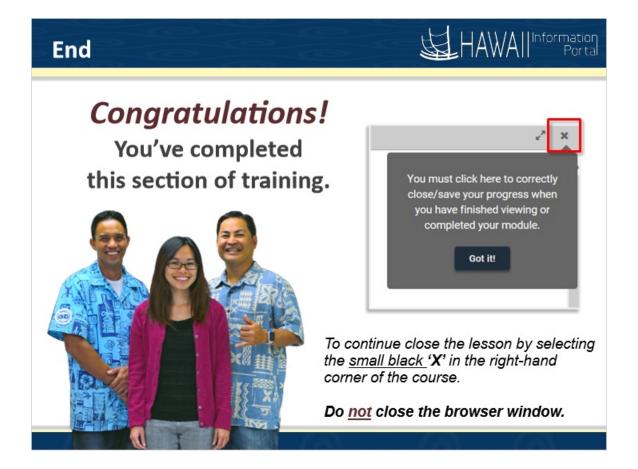


Congratulations!

You've successfully completed this lesson.



End



Congratulations!

You've completed this section of training.

To continue close the lesson by selecting the <u>small black</u> 'X' in the right-hand corner of the course.

Do not close the browser window.