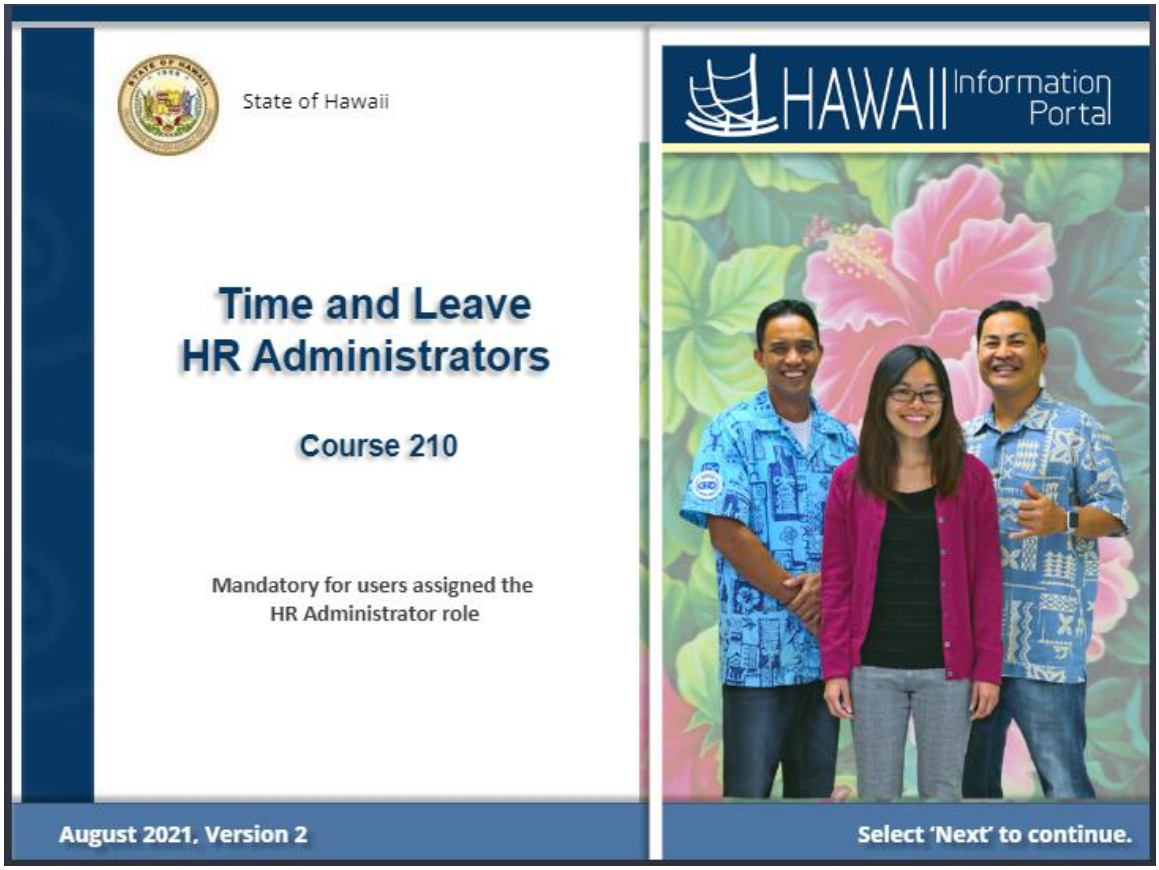
210 - Time and Leave - HR Administrator - Part 1



Time and Leave - HR Administrators

Course 210

Mandatory for users assigned the HR Administrator role

Duration

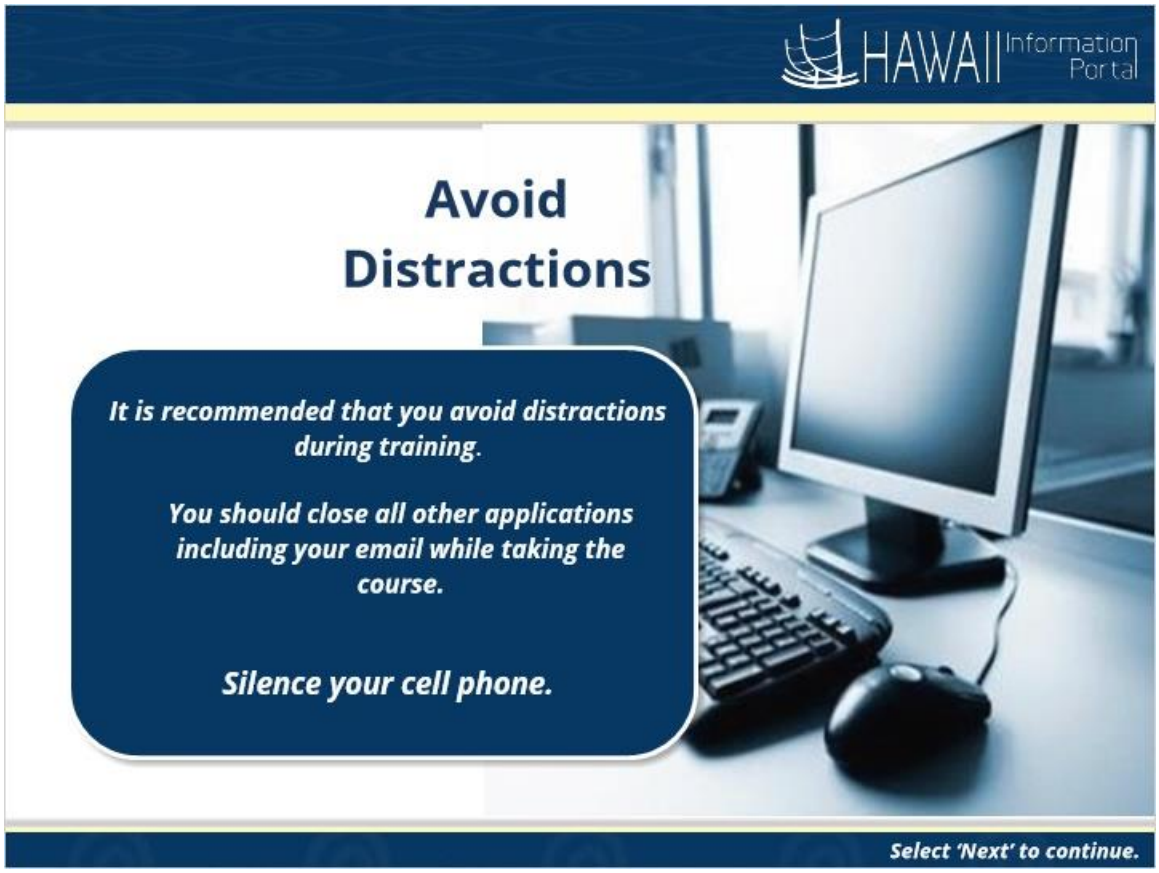
This course will take approximately 3-4 hours.

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.

Table of Contents

HR Administrator Activities - Part 1

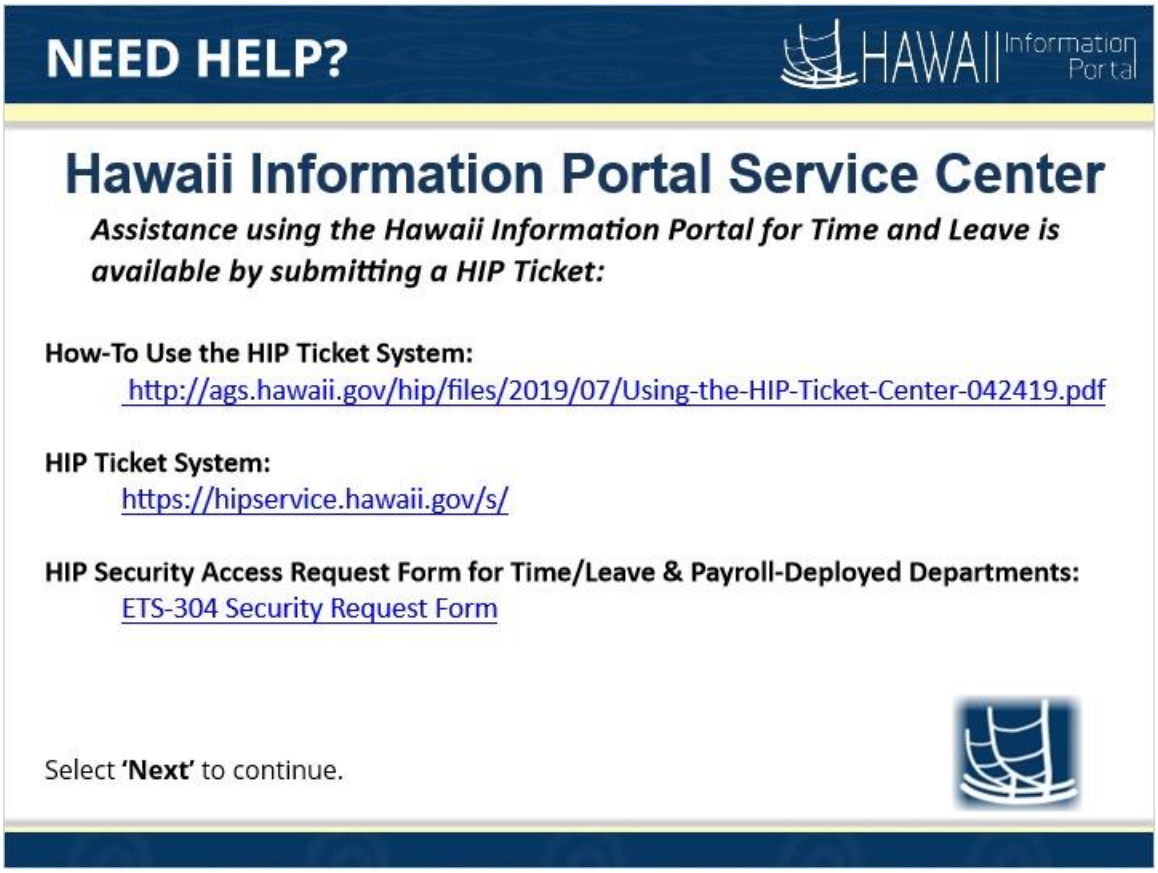
Course Objective | Need Help? | Key Terminology
Time and Leave Key Points | Create and Maintain Absences
Initiate Donation Requests | Adjust Leave Bank Balances
View Transaction History | Query Viewer

COURSE OBJECTIVES

After completing this course you will understand how to

- Find additional help and assistance
- Create and Maintain Absences
- Initiate Donation Leave Requests
- Adjust Leave Bank Balances
- View Transaction History
- Use Query Viewer

NEED HELP?



Hawaii Information Portal Service Center

Assistance using the Hawaii Information Portal for Time and Leave is available by submitting a HIP Ticket:

How-To Use the HIP Ticket System:

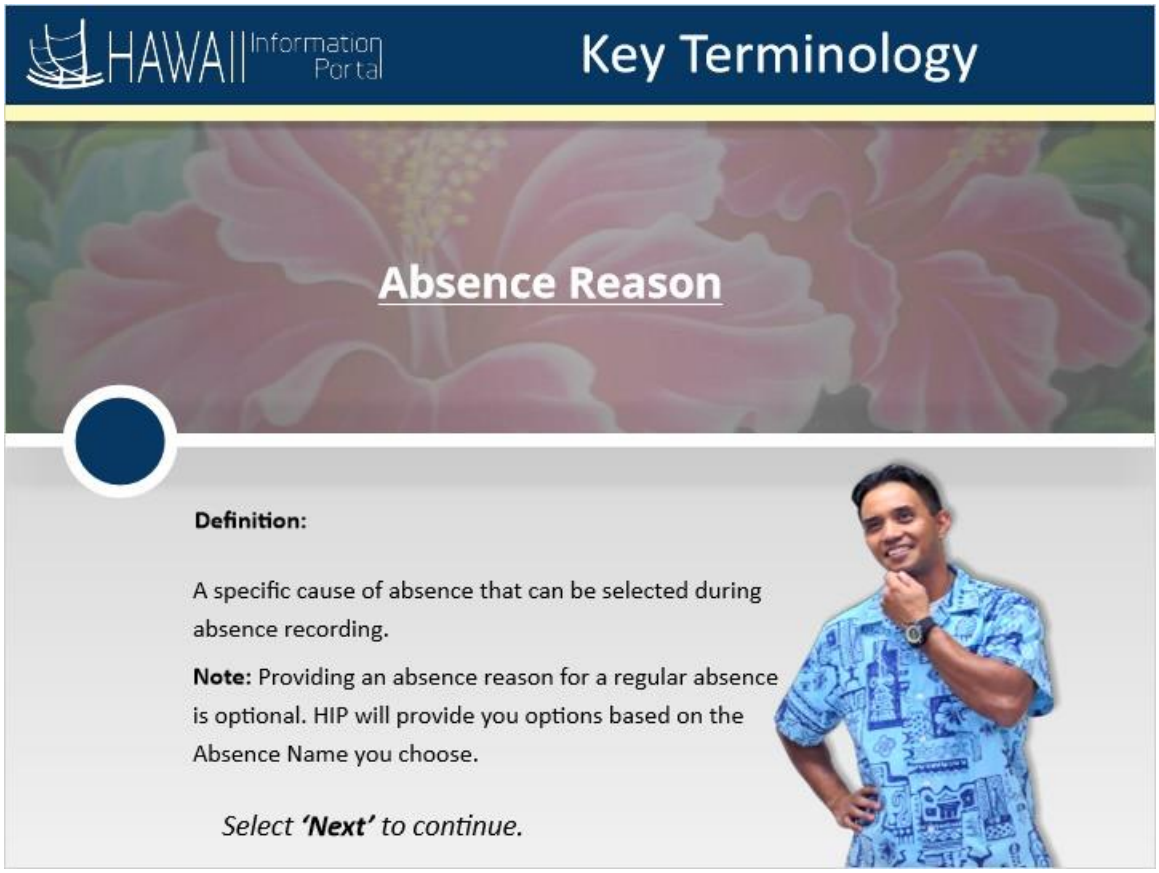
http://ags.hawaii.gov/hip/files/2019/07/Using-the-HIP-Ticket-Center-042419.pdf

HIP Ticket System: https://hipservice.hawaii.gov/s/

HIP Security Access Request Form for Time/Leave & Payroll-Deployed Departments (ETS-304 Security Request Form):

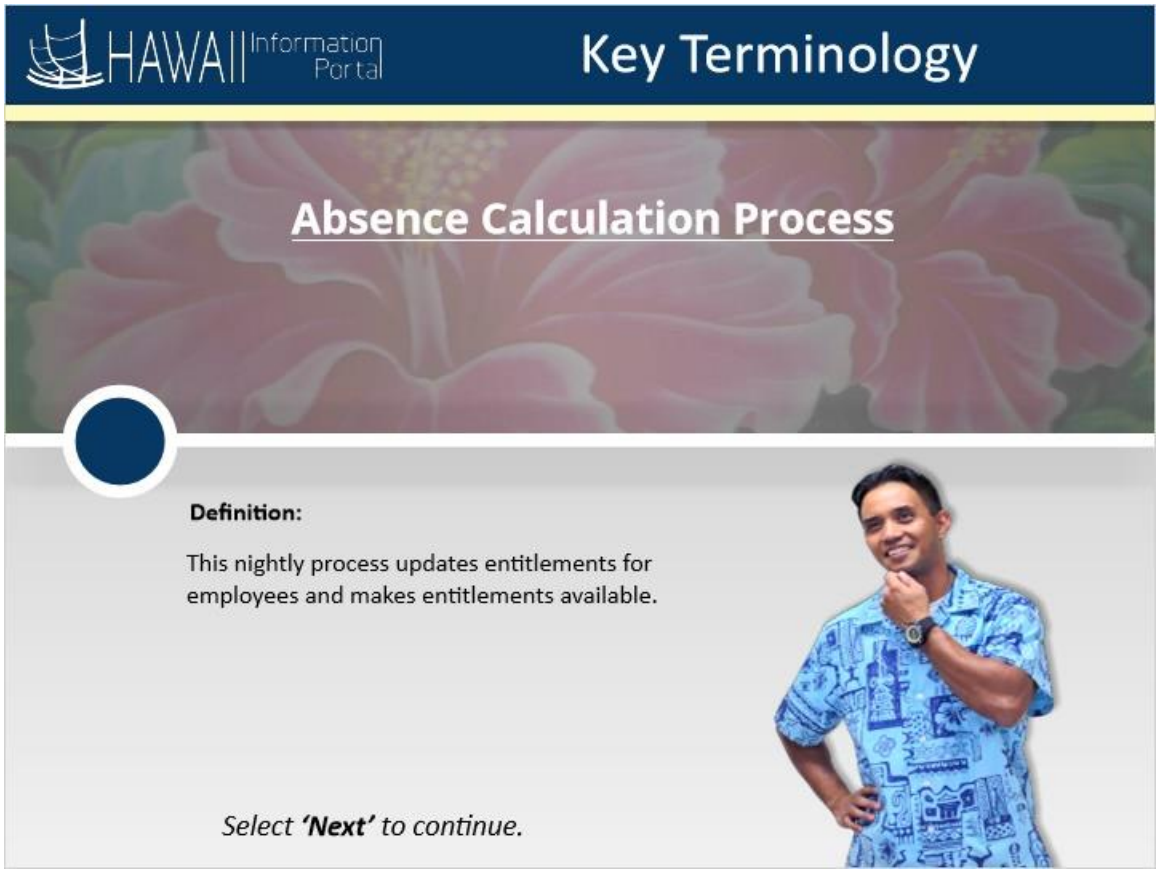
https://docs.google.com/forms/d/e/1FAIpQLSdBn_vtESRUl0jMqCTfW0DaTObLafDLbrSI3i-TMqU0n2necw/viewform

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. HIP will provide you options based on the Absence Name you choose.



Absence Calculation Process

This nightly process updates entitlements for employees and makes entitlements available.

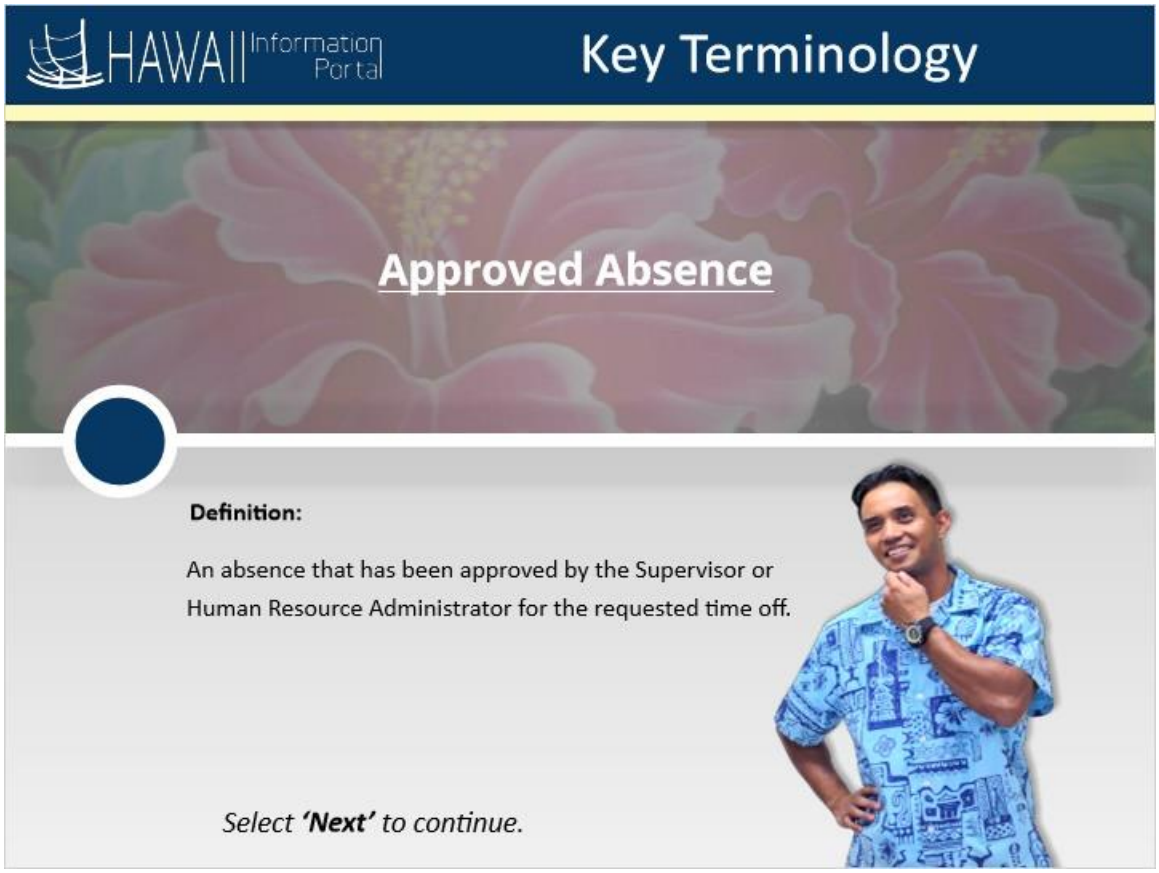
Entitlement

Leave earned based on eligible hours worked. Also referred to as leave accrued or leave earned in HIP.

Note: Leave accruals are earned based on eligible hours according to your CBA

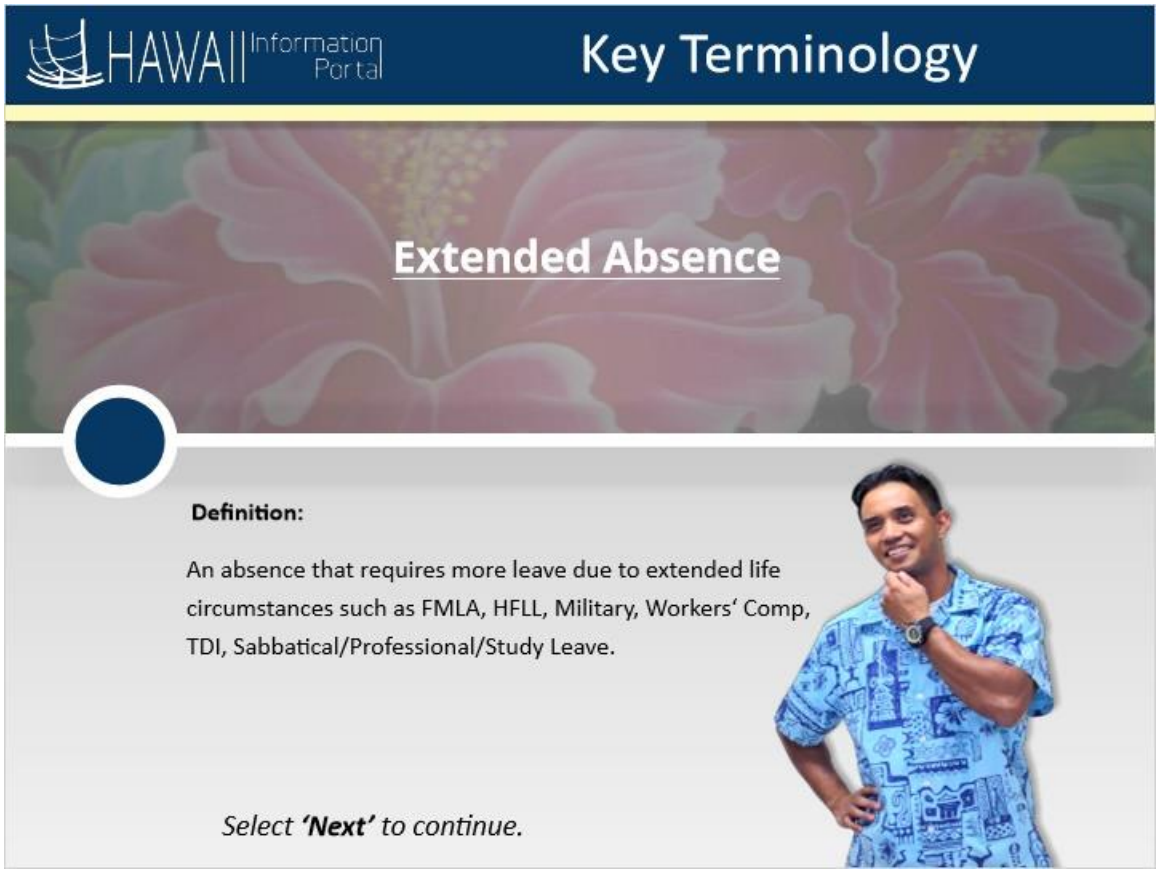
Absence Request

A request by an employee for time off for sick, vacation, military, bereavement or other time away from work.



Approved Absence

An absence that has been approved by the Supervisor or Human Resource Administrator for the requested time off.



Extended Absence

An absence that requires more leave due to extended life circumstances such as FMLA, HFLL, Military, Workers Comp, TDI, Sabbatical/Professional/Study Leave.

Absence Type

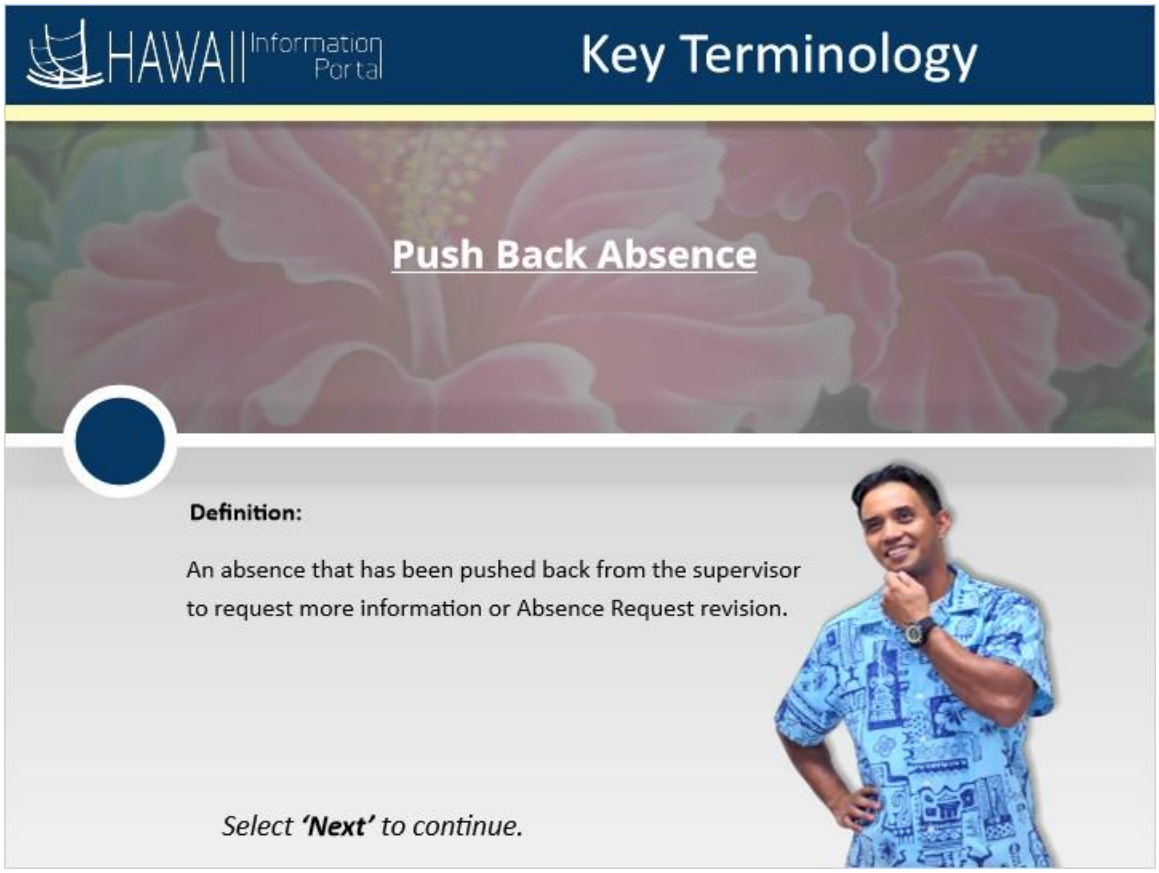
A grouping of absences, such as illness or personal business that is used for reporting, accrual, and compensation calculations.

Donate Leave Request

An employee may donate accrued leave such as vacation time to bank. This bank is used to receive employee donations that will go to those who have exhausted all their leave due to a life changing event.

Forecasted Absence

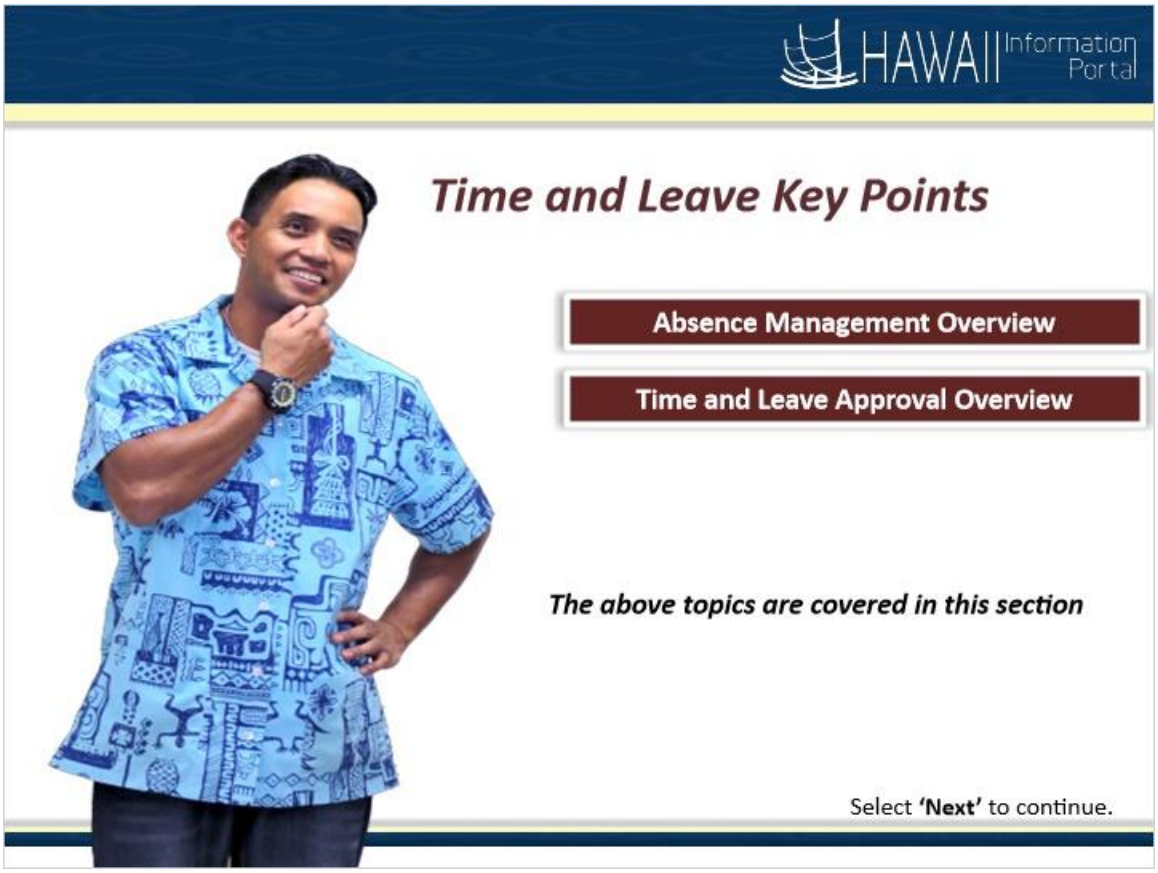
The result of forecasting an absence, to display whether the employee is eligible to take the absence.



Push Back Absence

An absence that has been pushed back from the supervisor to request more information or Absence Request revision.

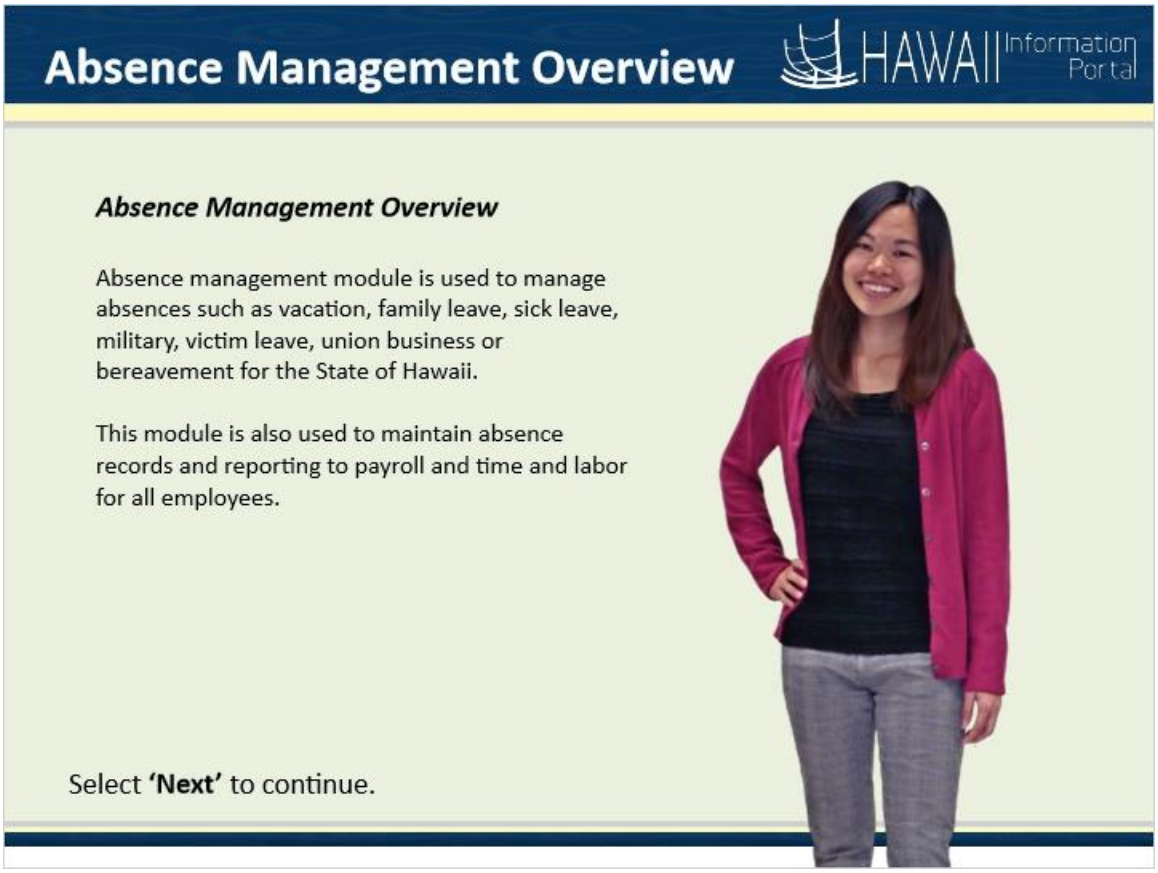
KEY POINTS



Time and Leave Key Points

- Absence Management Overview
- Time and Leave Approval Overview

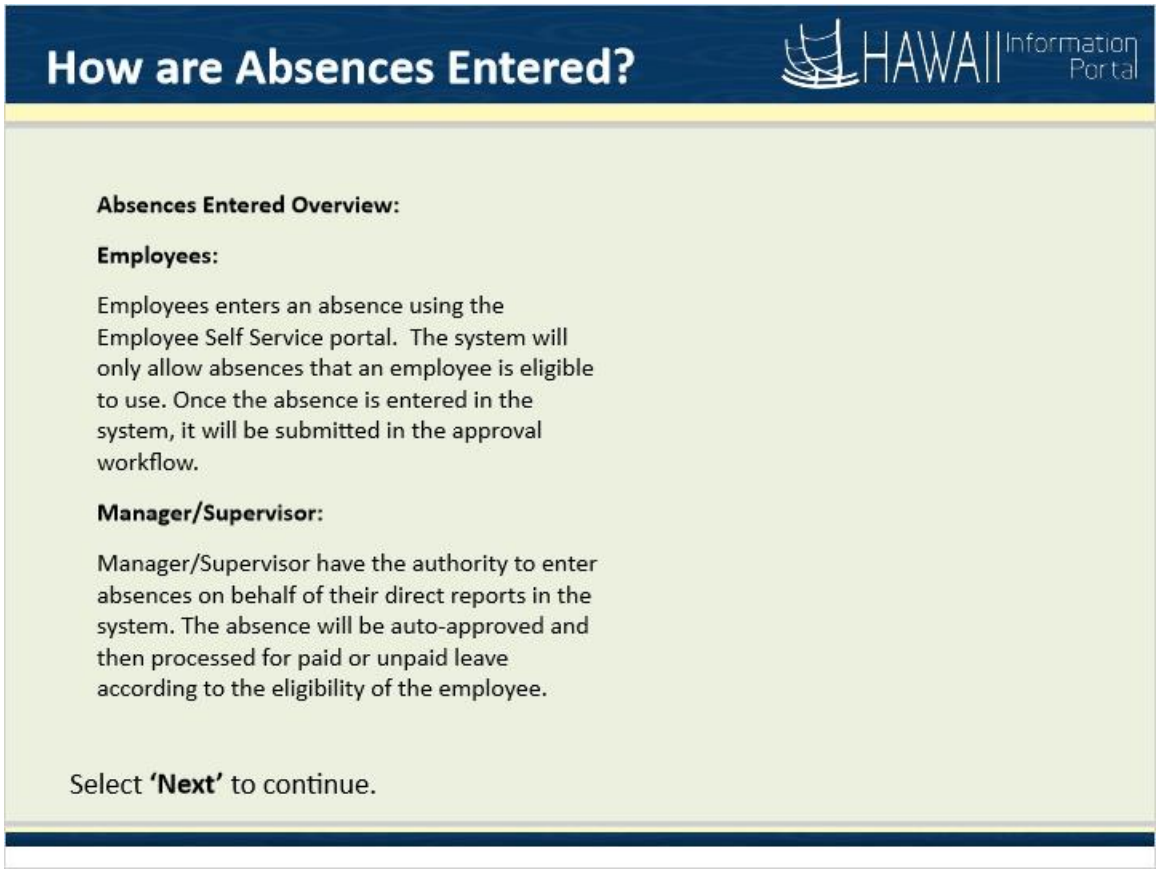
ABSENCE MANAGEMENT OVERVIEW



Absence Management 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.



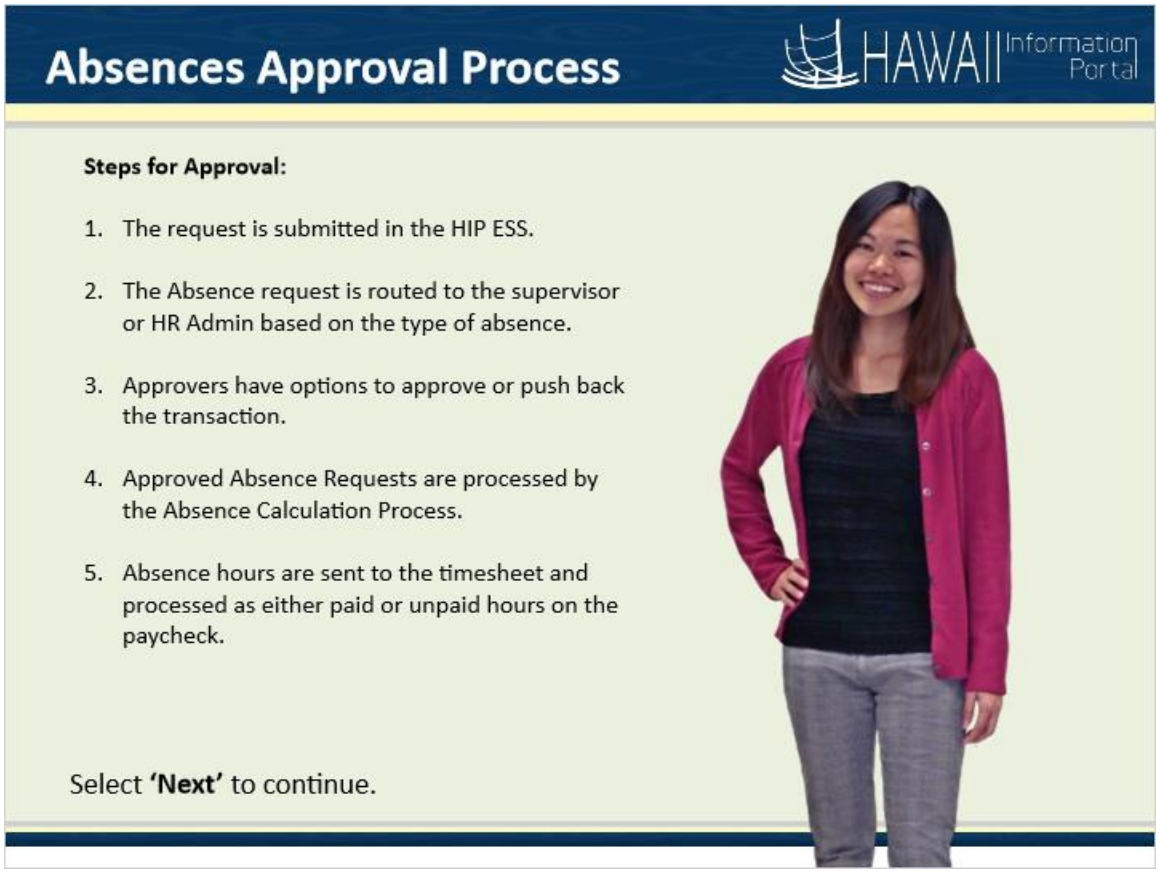
How are Absences Entered?

Employees:

Employees 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.



Absences Approval Process

Steps for Approval:

1. The request is submitted in the HIP ESS.
2. The Absence request is routed to the 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 hours are sent to the timesheet and processed as either paid or unpaid hours on the paycheck.

Role and Responsibilities

Employees are responsible 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

Roles and Responsibilities

Supervisors are responsible 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

Roles and Responsibilities

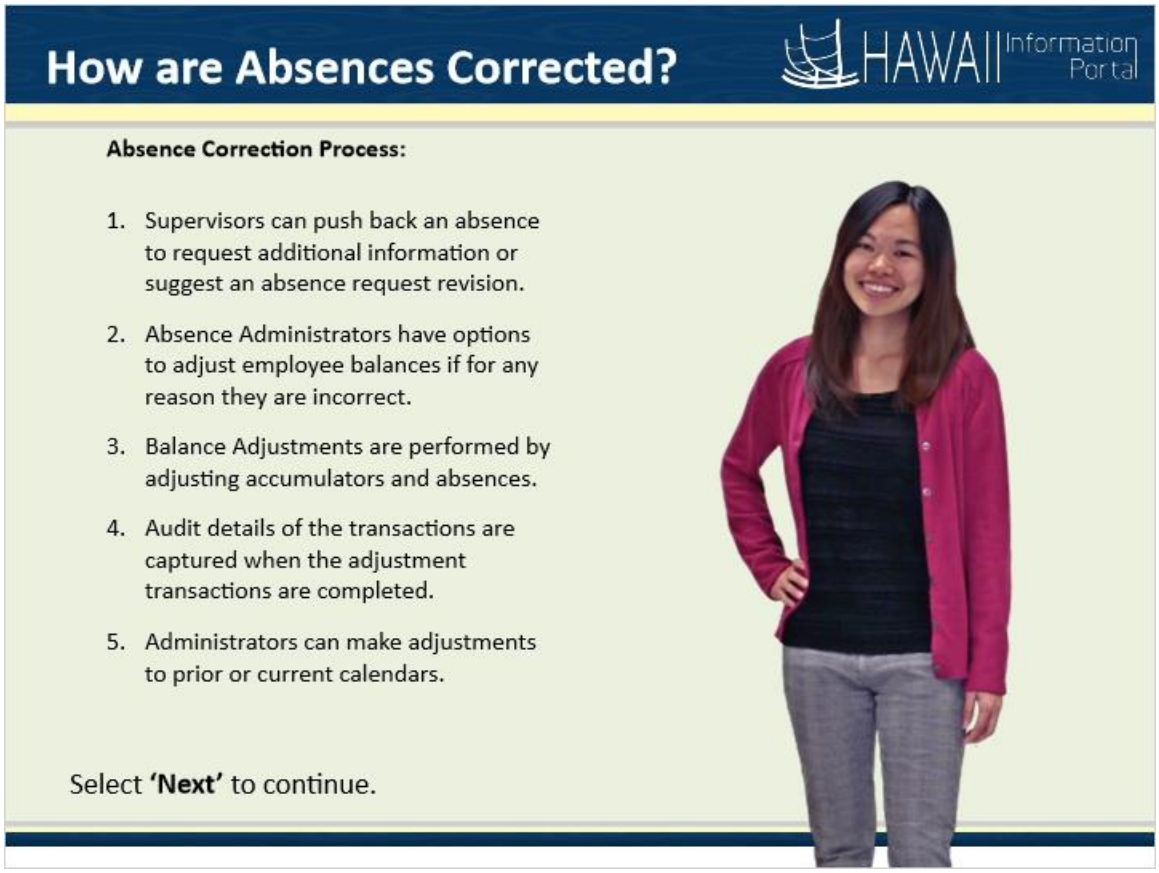
Leave Keepers are responsible to:

- Maintain employee absences
- Manage absence exceptions
- Run absence reports
- Add, edit, submit, save and cancel absence request
- View Absence balances

Roles and Responsibilities

HR Administrators are responsible to:

- Manage extended leave requests
- Manage and approve request
- Manage absence exceptions
- Add, edit, submit, save and cancel absence request
- View Absence balances



How are Absences Corrected?

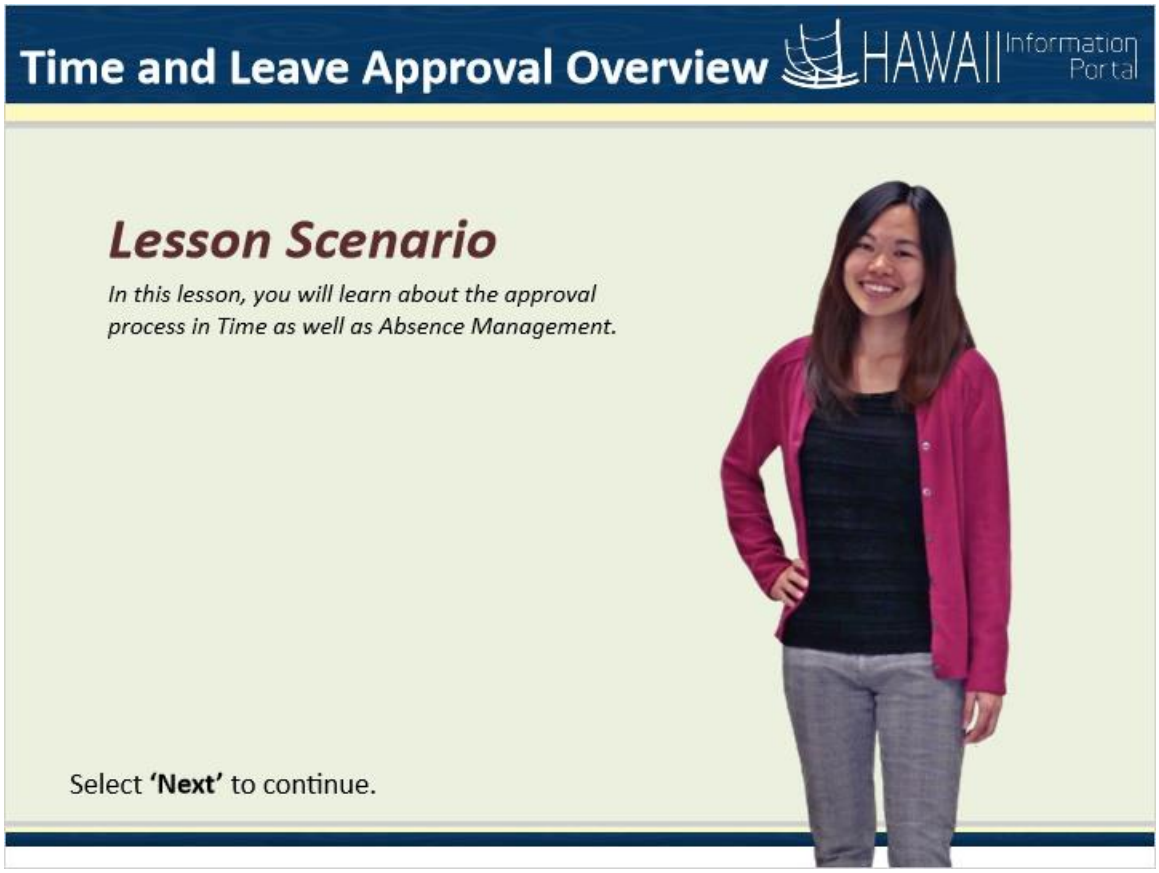
Absence Correction Process:

1. Supervisors 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.

Congratulations!

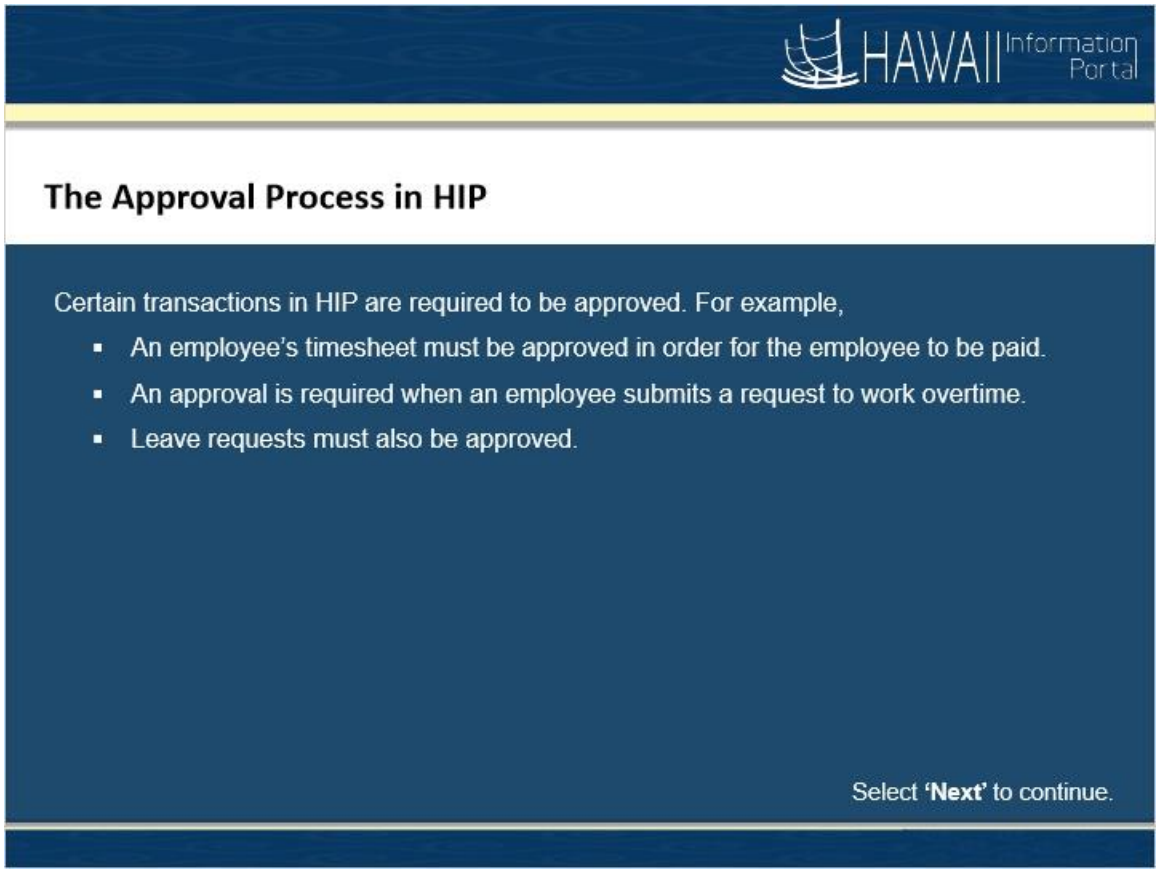
You've successfully completed this lesson.

TIME AND LEAVE APPROVAL OVERVIEW



Lesson Scenario

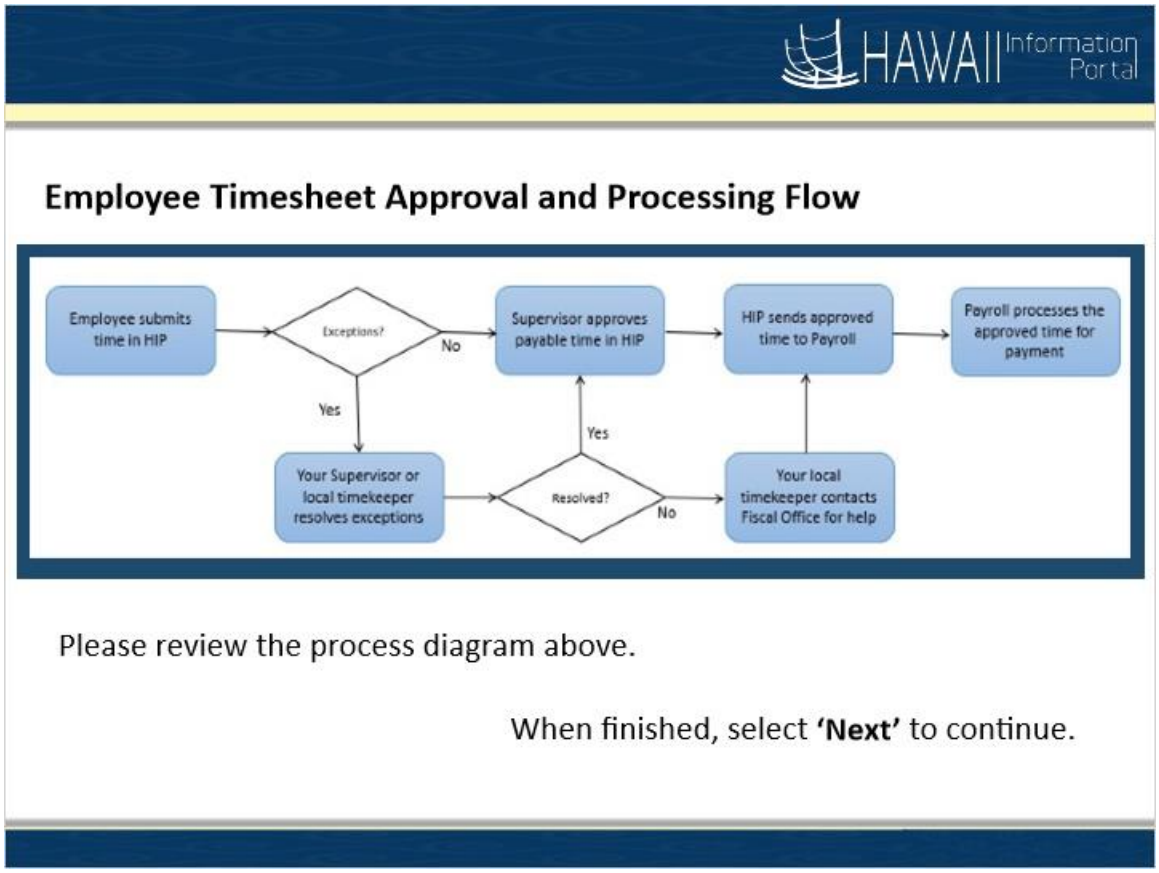
In this lesson, you will learn about the approval process in Time and Labor as well as Absence Management.



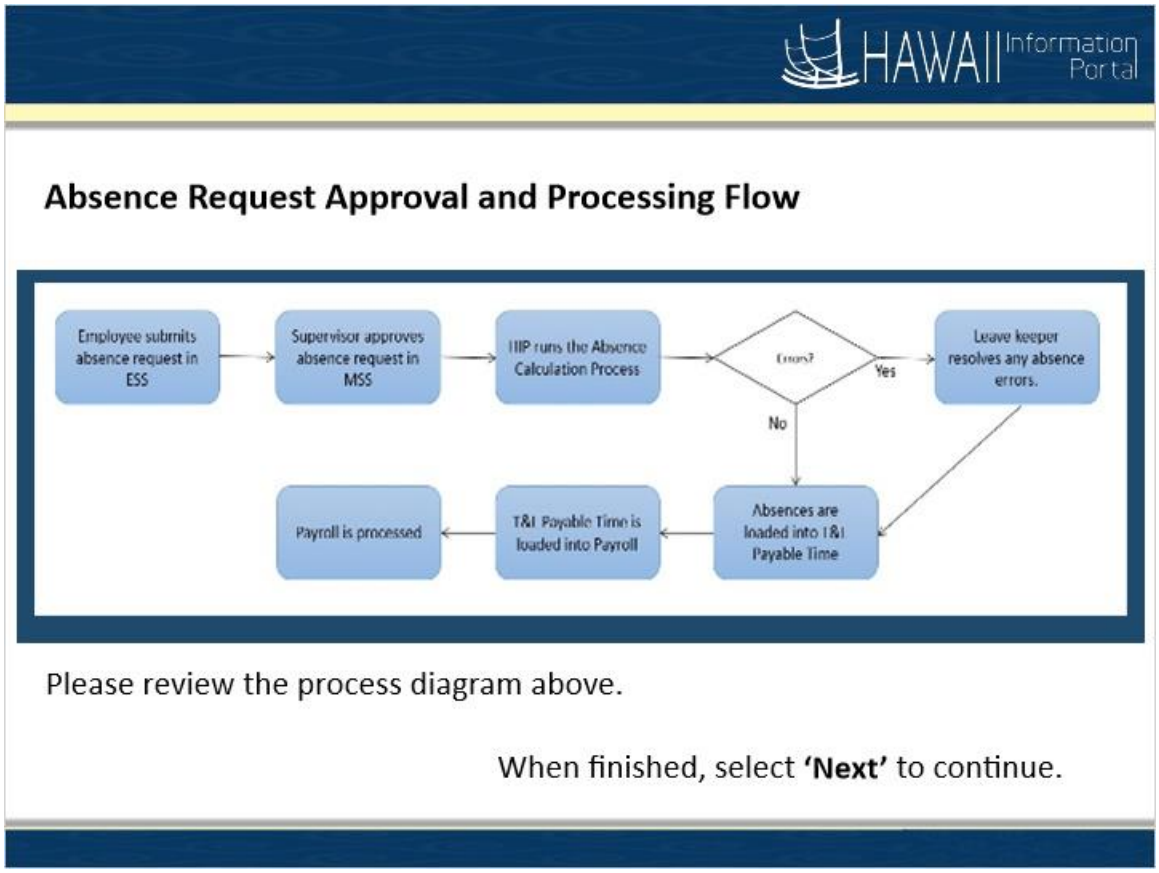
The Approval Process in HIP

Certain transactions in HIP are required to be approved. For example,

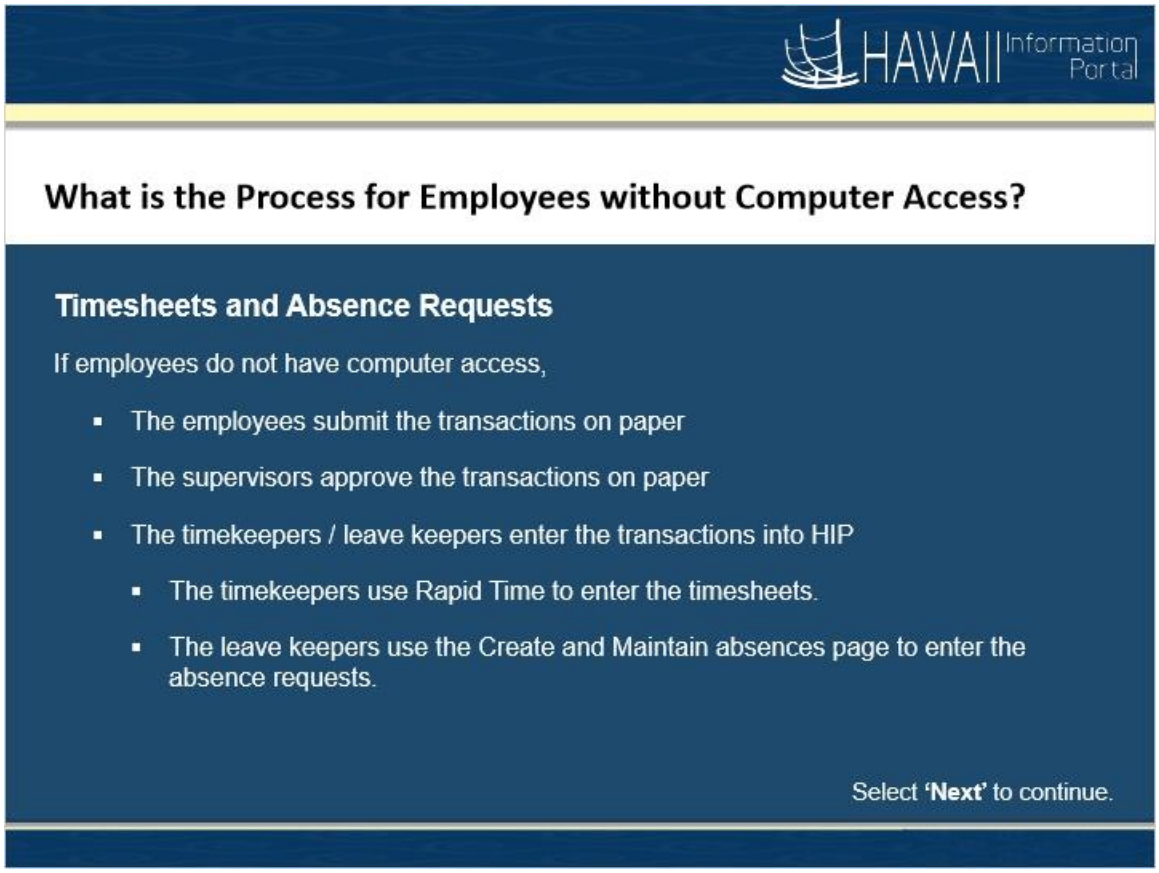
- An employee's timesheet must be approved in order for the employee to be paid.
- An approval is required when an employee submits a request to work overtime.
- Leave requests must also be approved.



Employee Timesheet Approval and Processing Flow



Absence Request Approval and Processing Flow



What is the Process for Employees without Computer Access?

Timesheets and Absence Requests

If employees do not have computer access,

- The employees submit the transactions on paper
- The supervisors approve the transactions on paper
- The timekeepers / leave keepers enter the transactions into HIP
  - The timekeepers use Rapid Time to enter the timesheets.
  - The leave keepers use the Create and Maintain absences page to enter the absence requests

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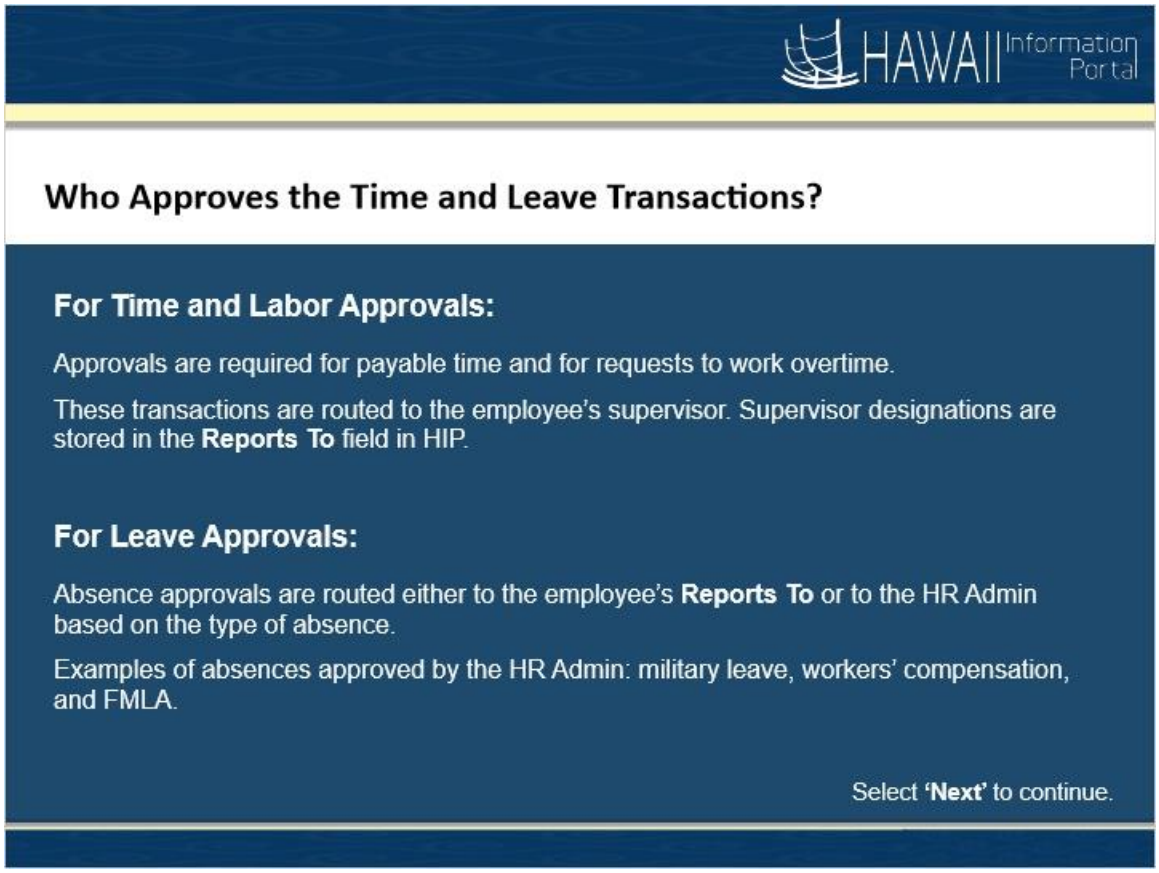


Who Approves the Time and Leave Transactions?

For Time and Labor Approvals:

Approvals are required for payable time and for requests to work overtime.

These transactions are routed to the employee's supervisor. Supervisor designations are stored in the Reports To field in HIP.

For Leave Approvals:

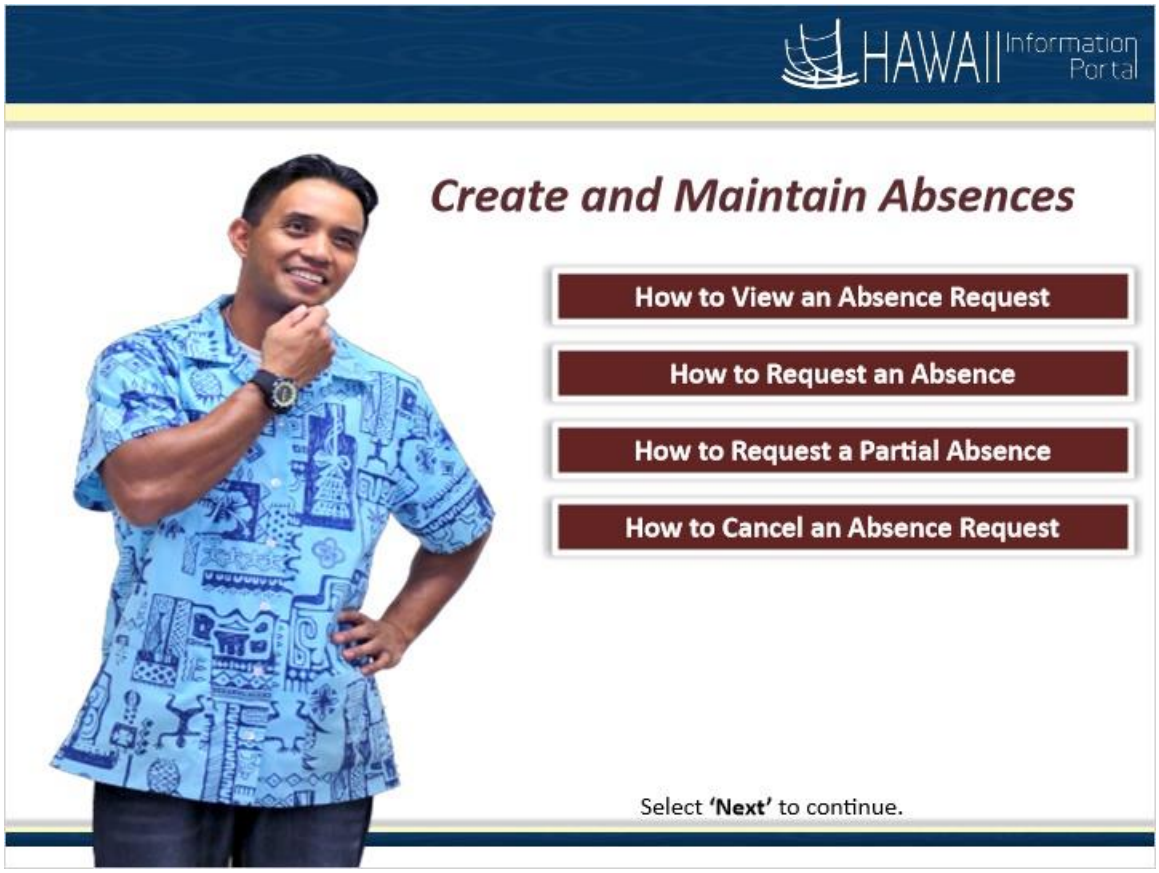
Absence approvals are routed either to the employee's Reports To or to the HR Admin based on the type of absence.

Examples of absences approved by the HR Admin: military leave, workers' compensation, and FMLA.

Congratulations!

You've successfully completed this lesson.

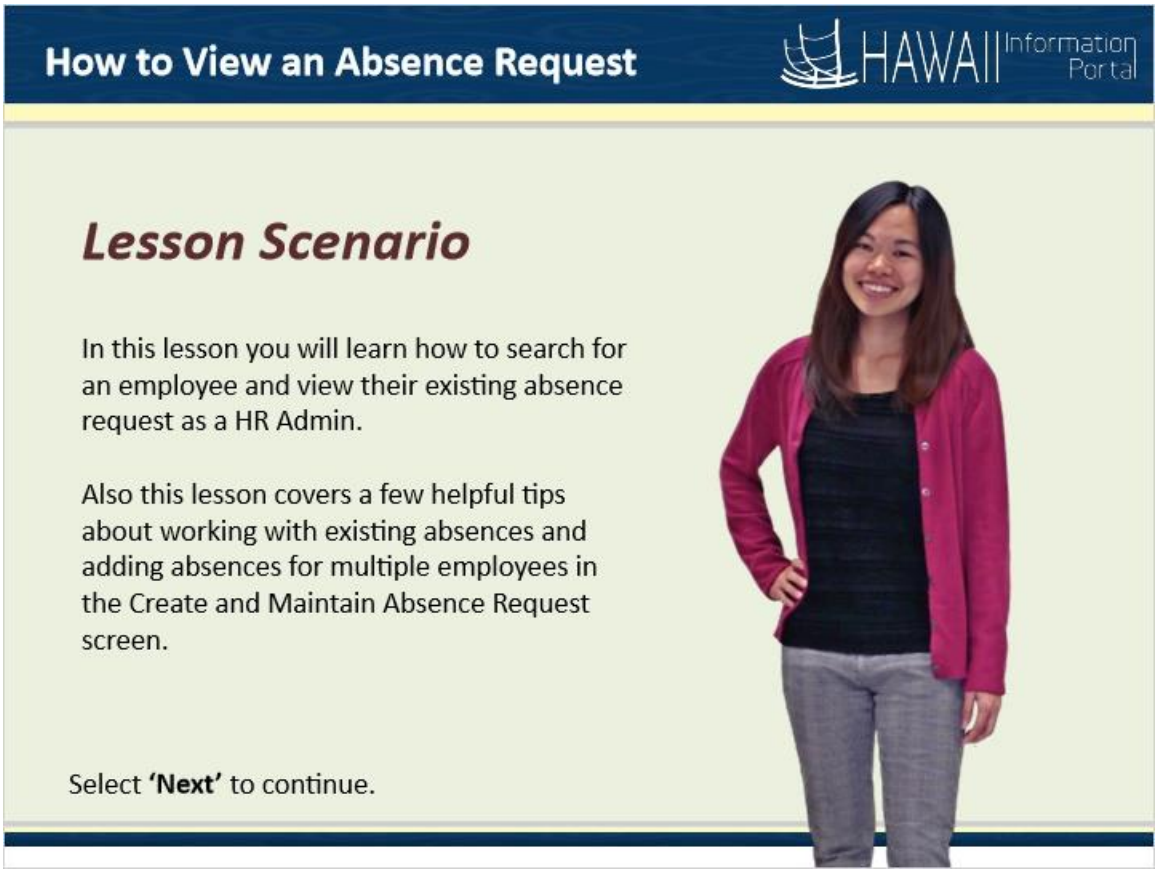
CREATE AND MAINTAIN ABSENCES



Create and Maintain Absences

- How to View an Absence Request
- How to Request an Absence
- How to Request a Partial Absence
- How to Cancel an Absence Request

HOW TO VIEW AN ABSENCE REQUEST

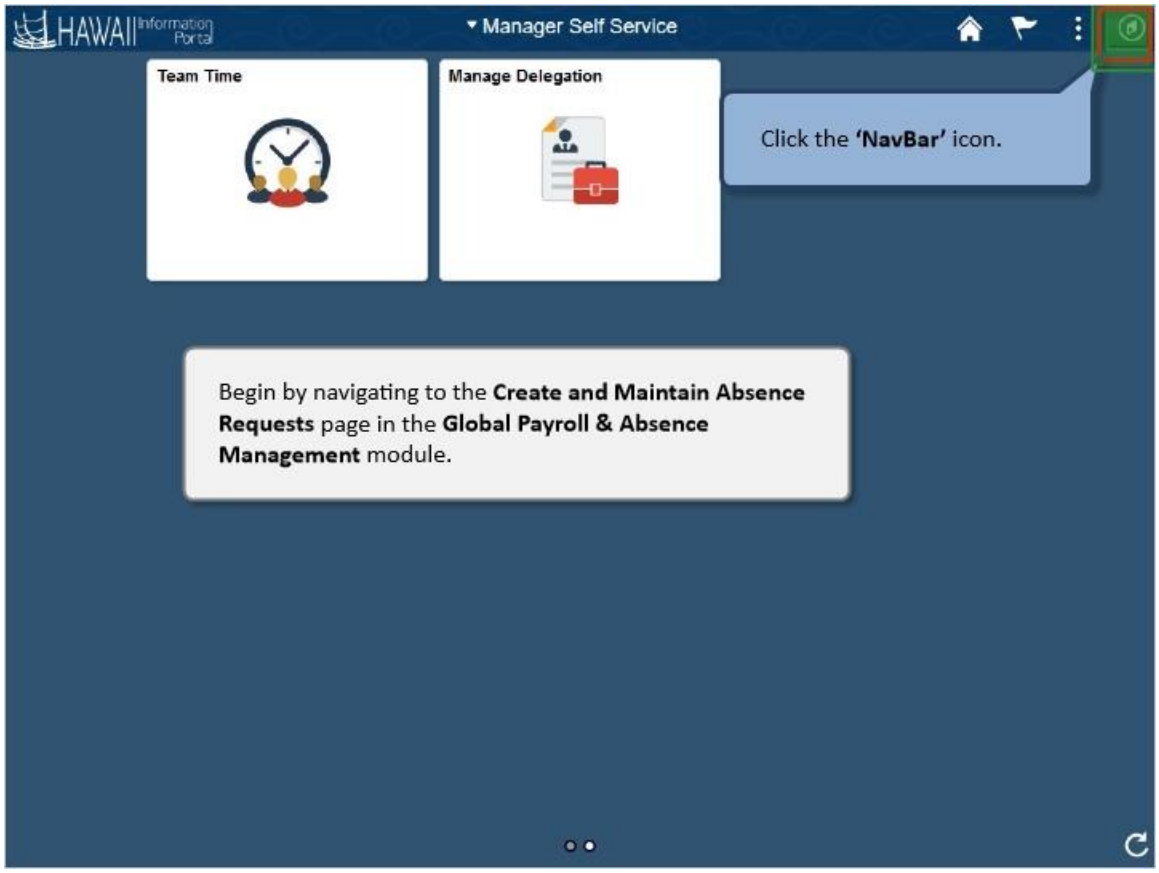


Lesson Scenario

In this lesson you will learn how to search for an employee and view their existing absence request as a HR Admin.

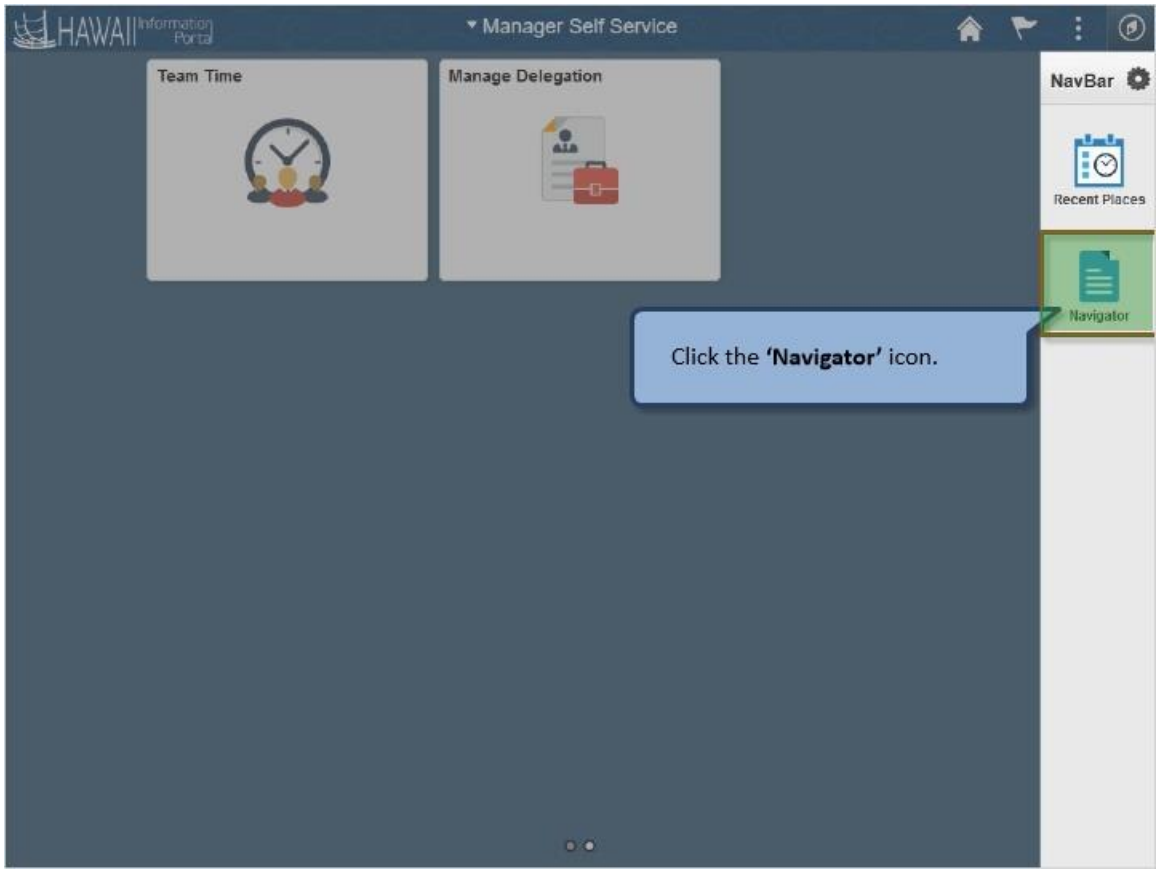
Also this lesson covers a few helpful tips about working with existing absences and adding absences for multiple employees in the Create and Maintain Absence Request screen.

1.

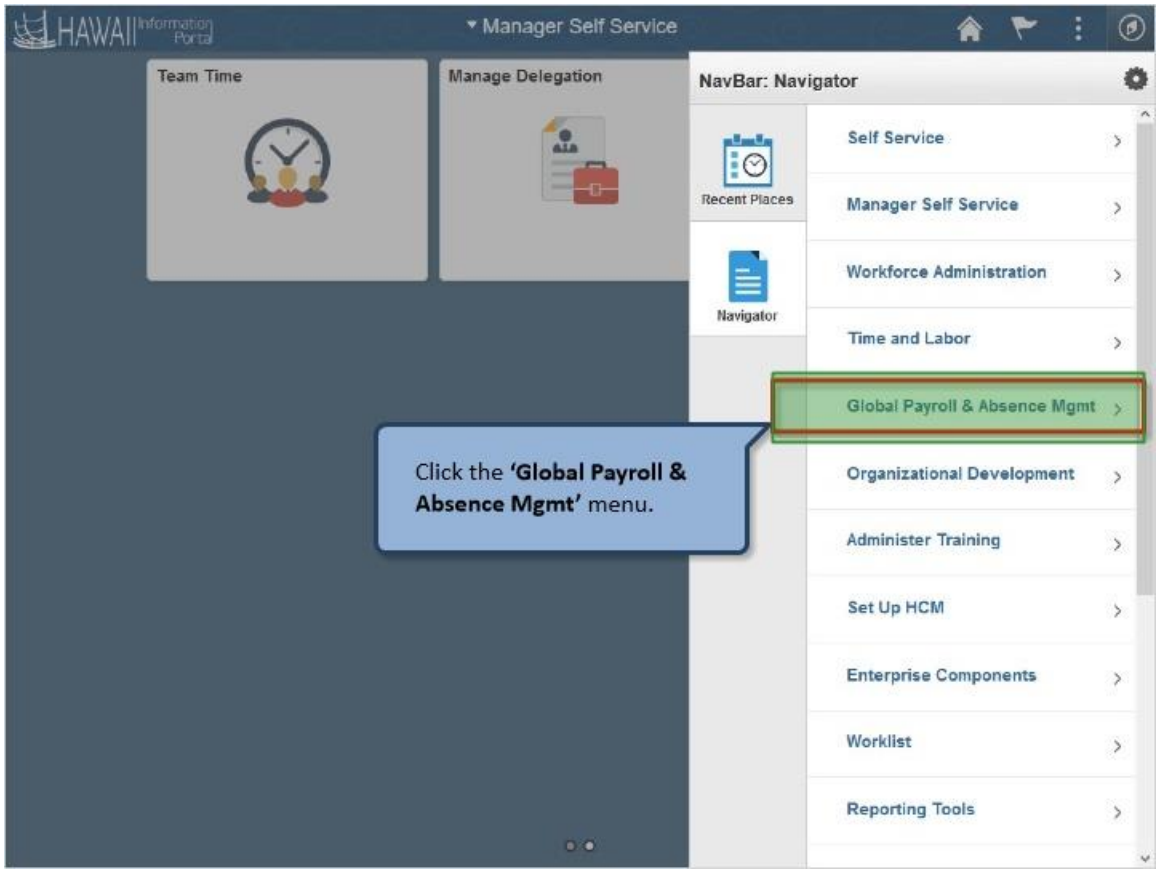


Begin by navigating to the **Create and Maintain Absence Requests** page in the **Global Payroll & Absence Management** module.

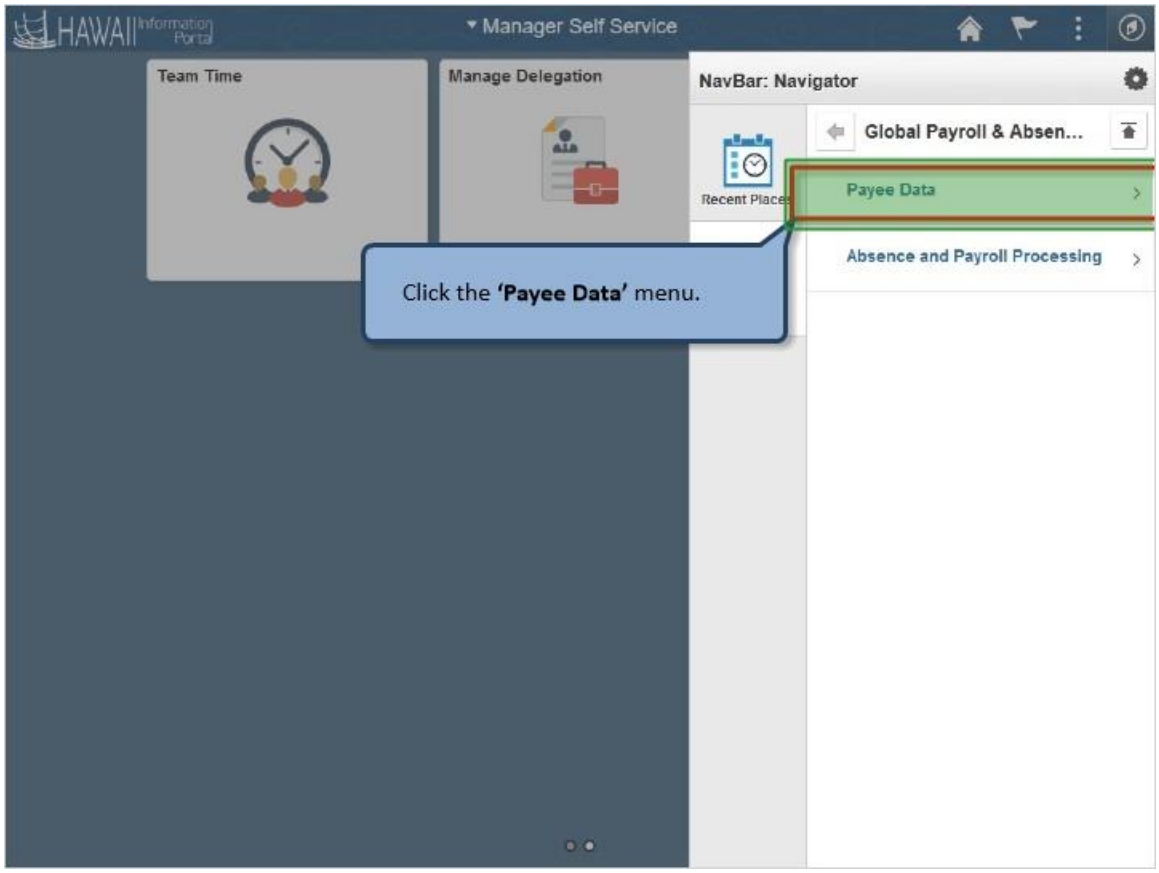
Click the **'NavBar'** button.



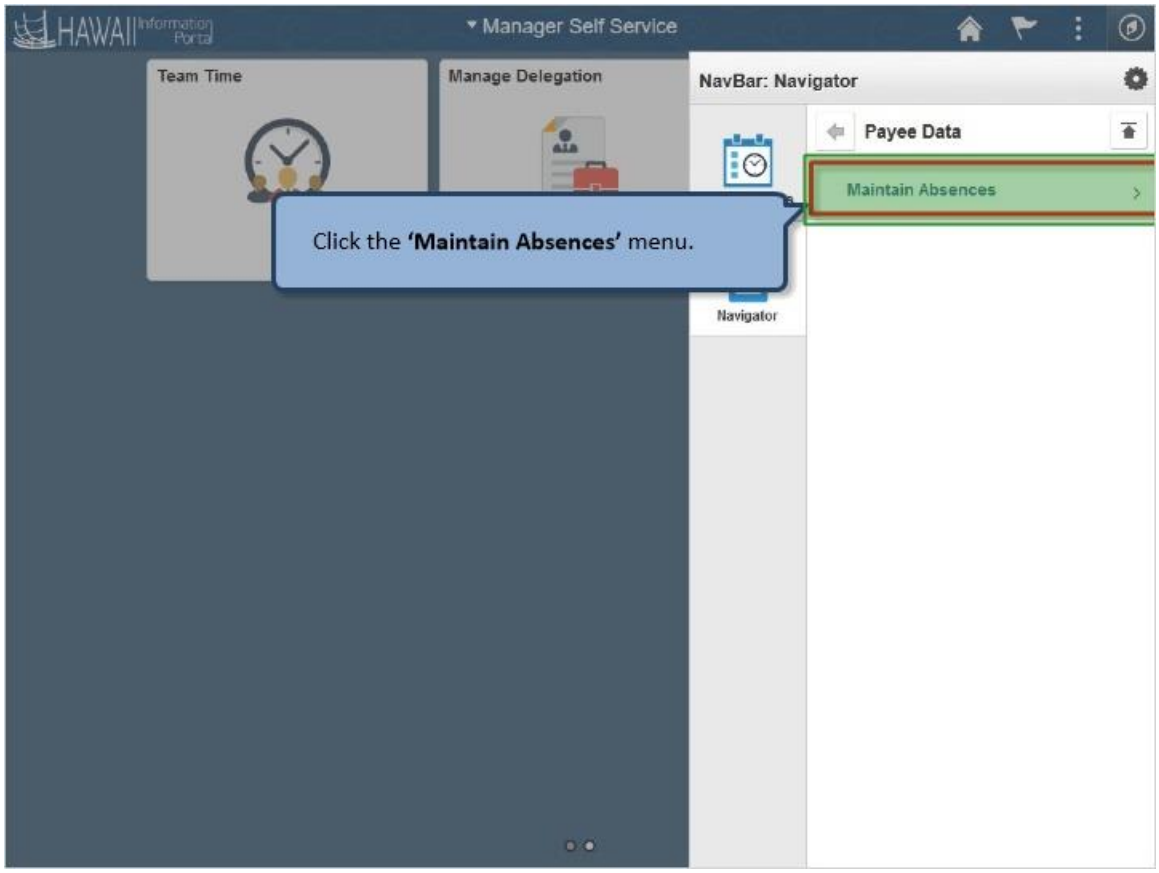
Click the '**Navigator'** icon.



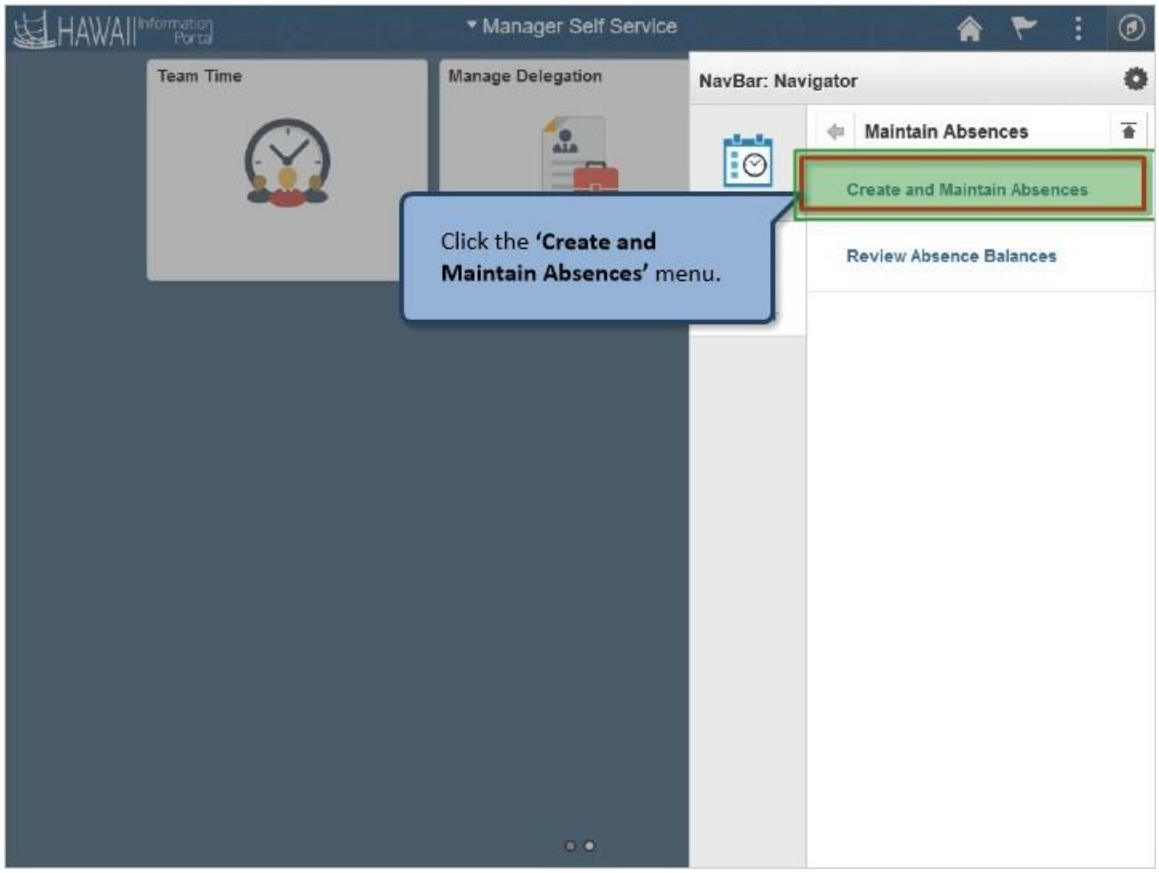
Click the **'Global Payroll & Absence Mgmt'** menu.



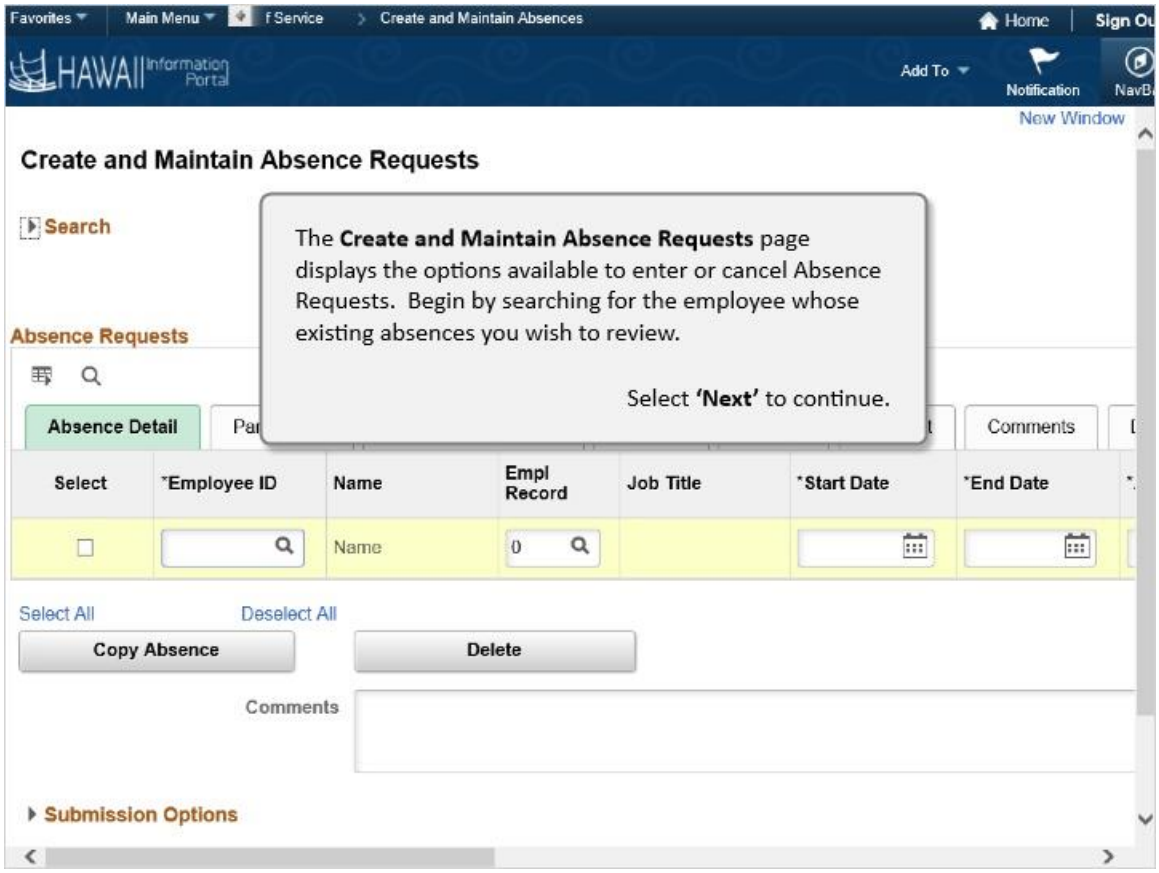
Click the **'Payee Data'** menu.



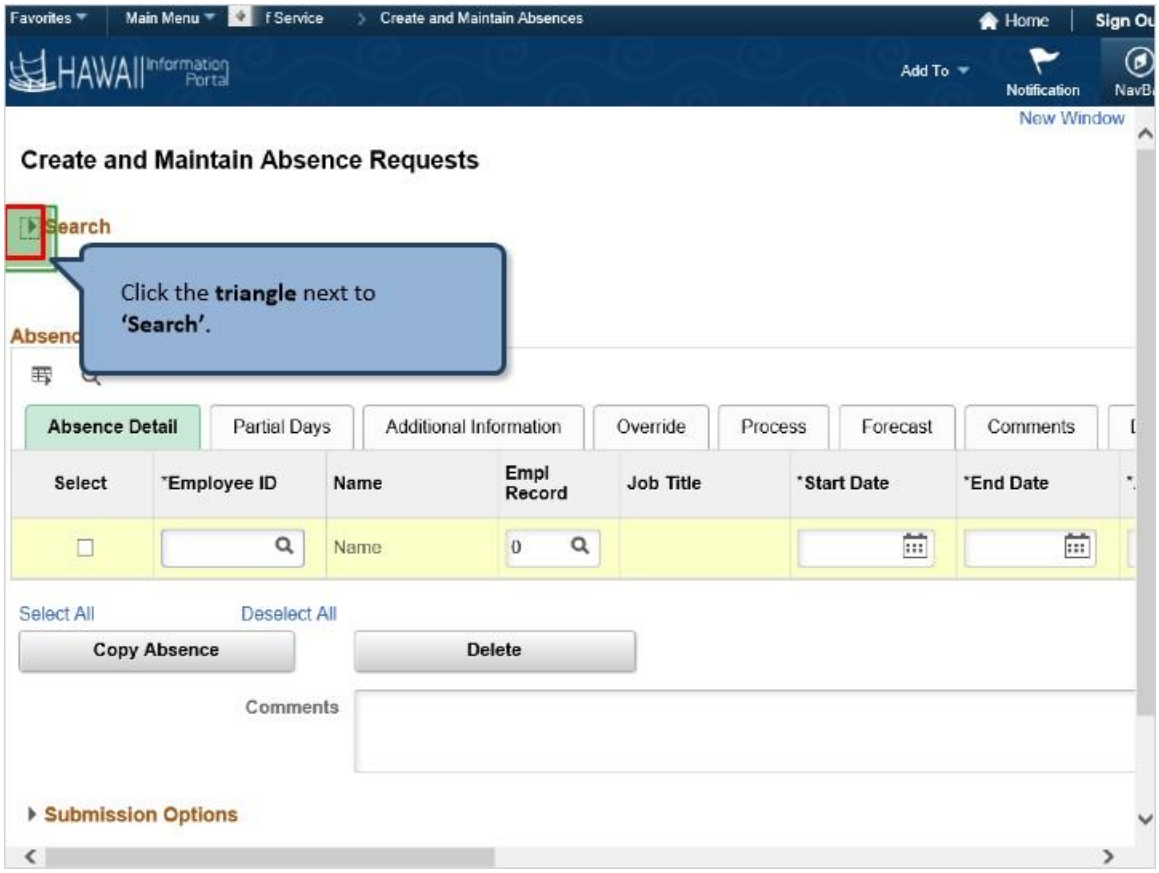
Click the **'Maintain Absences'** menu.



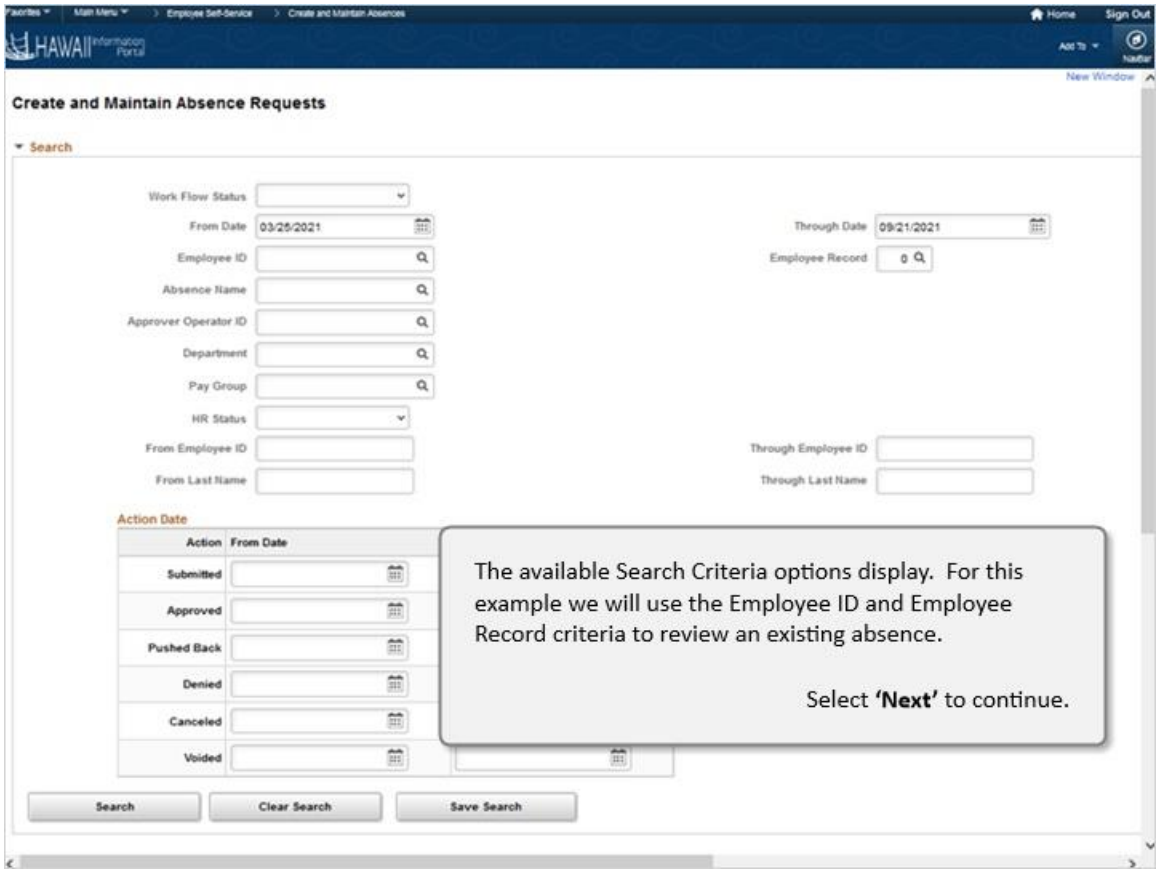
Click the **'Create and Maintain Absences'** menu.



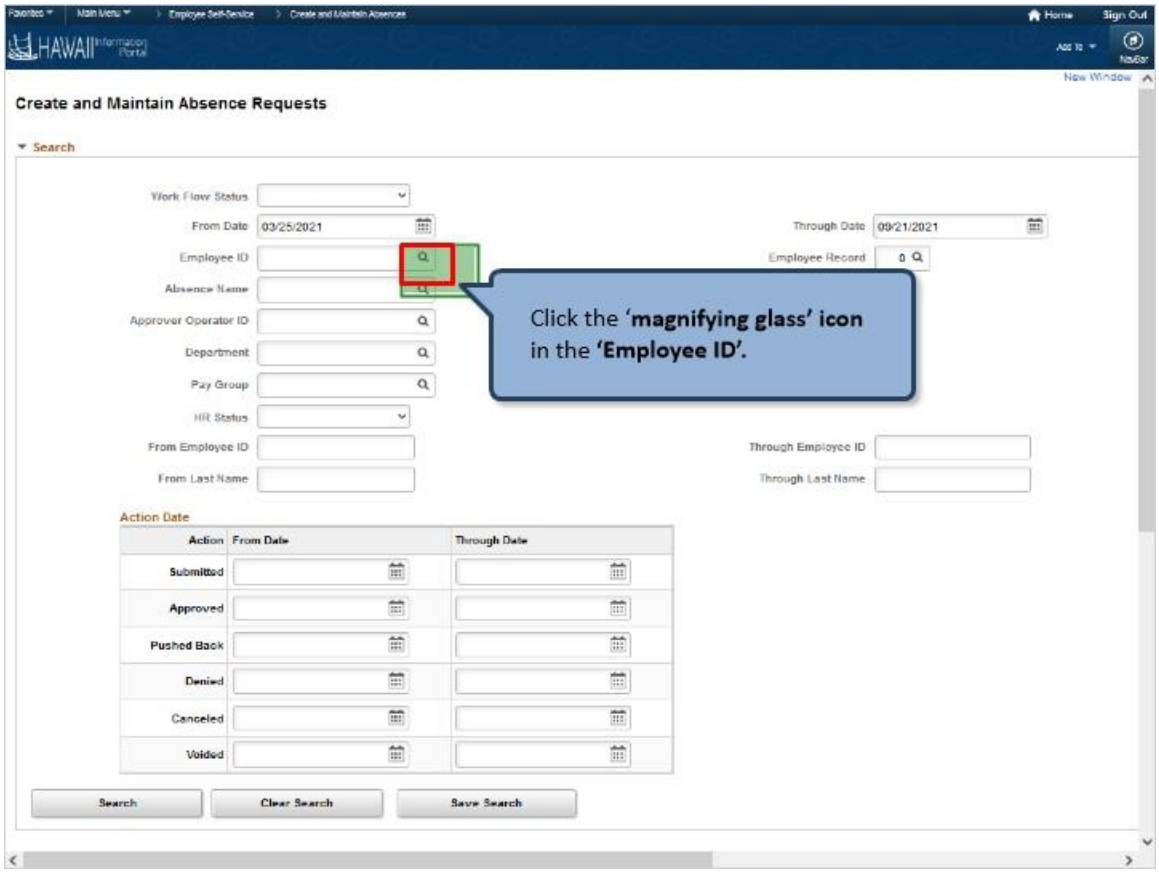
The **Create and Maintain Absence Requests** page displays the options available to enter or cancel Absence Requests. Begin by searching for the employee whose existing absences you wish to review.



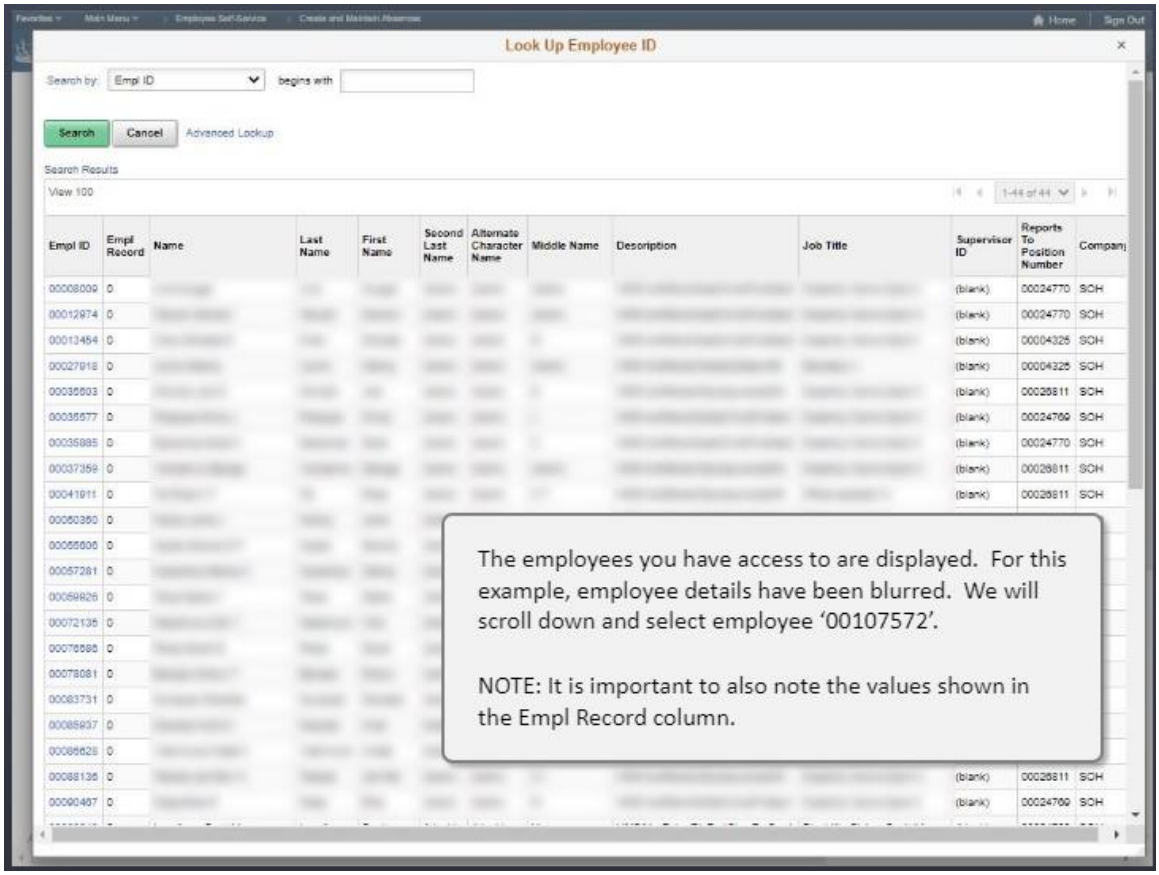
Click the **triangle** next to **'Search'**.



The available Search Criteria options display. For this example, we will use the Employee ID and Employee Record criteria to review an existing absence.

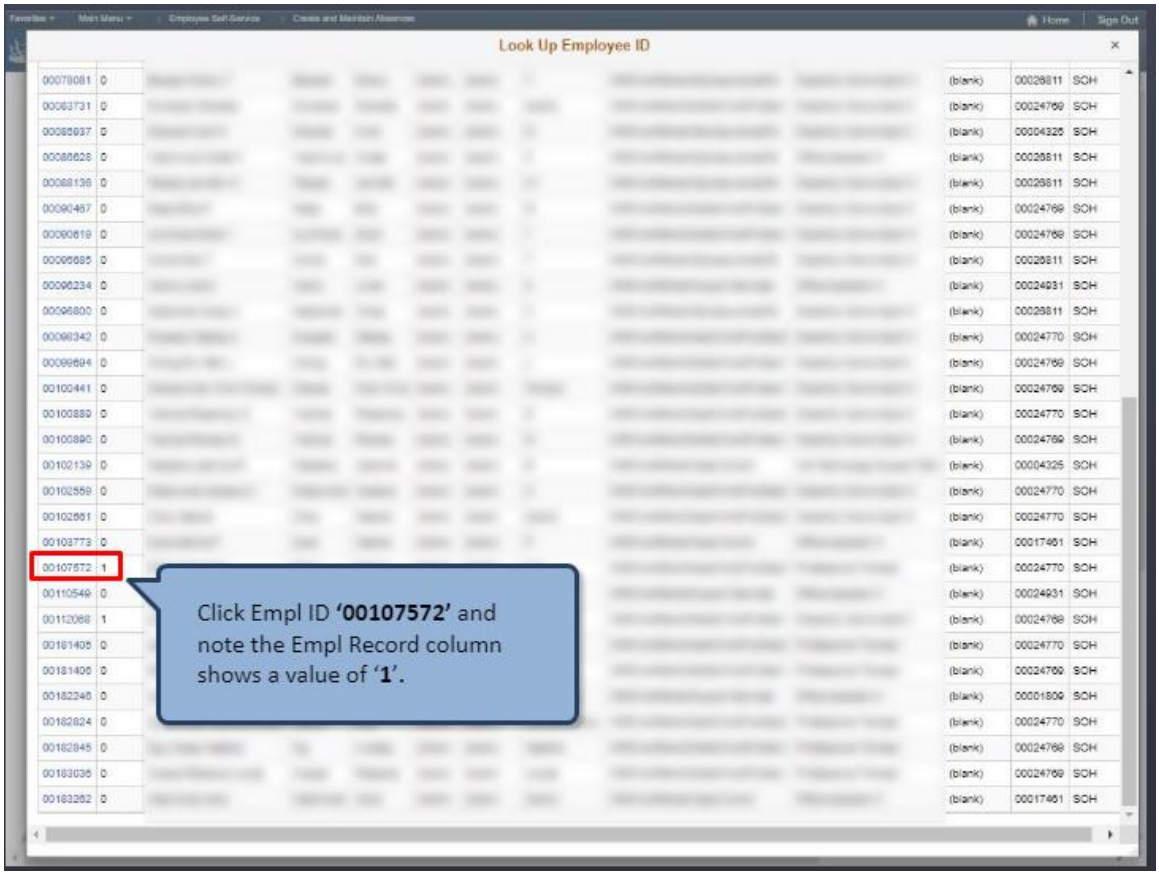


Click the '**magnifying glass' icon** in the **'Employee ID'.**

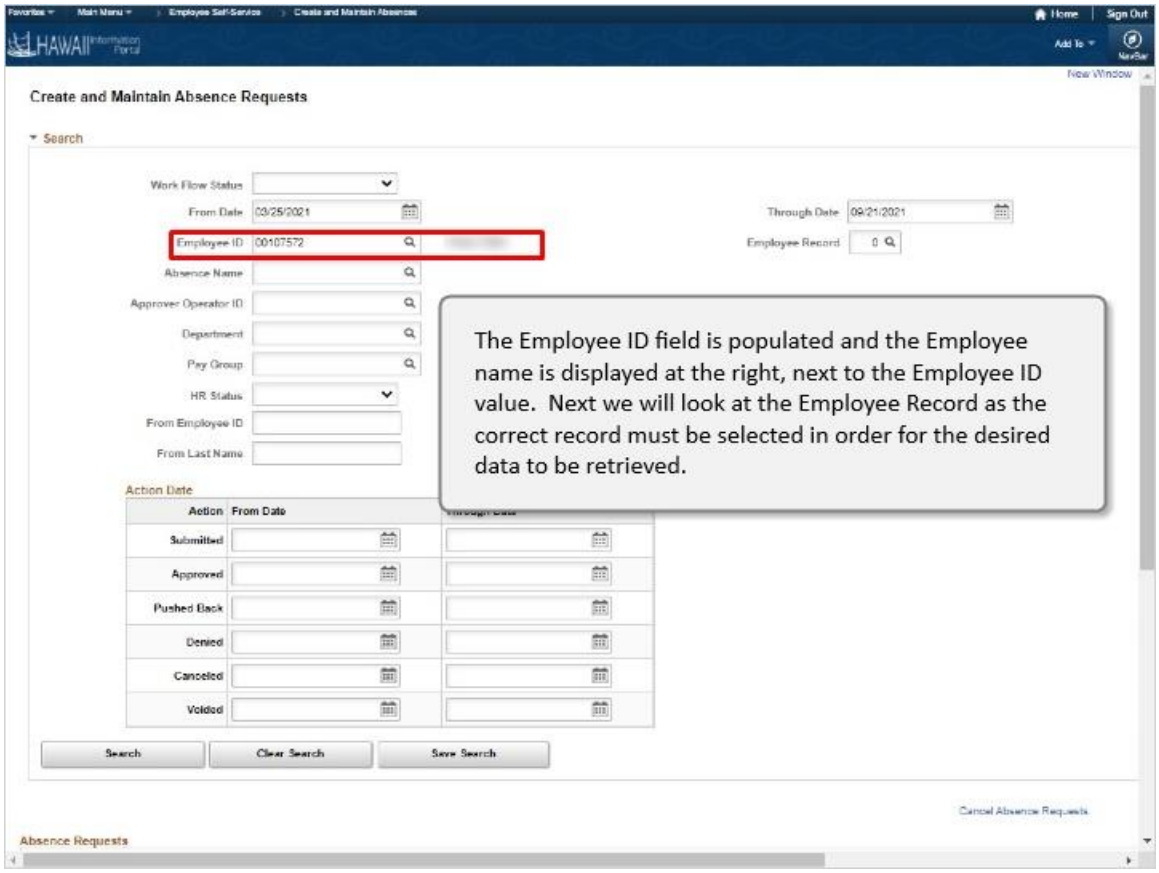


The employees you have access to are displayed. For this example, employee details have been blurred. We will scroll down and select employee '00107572'.

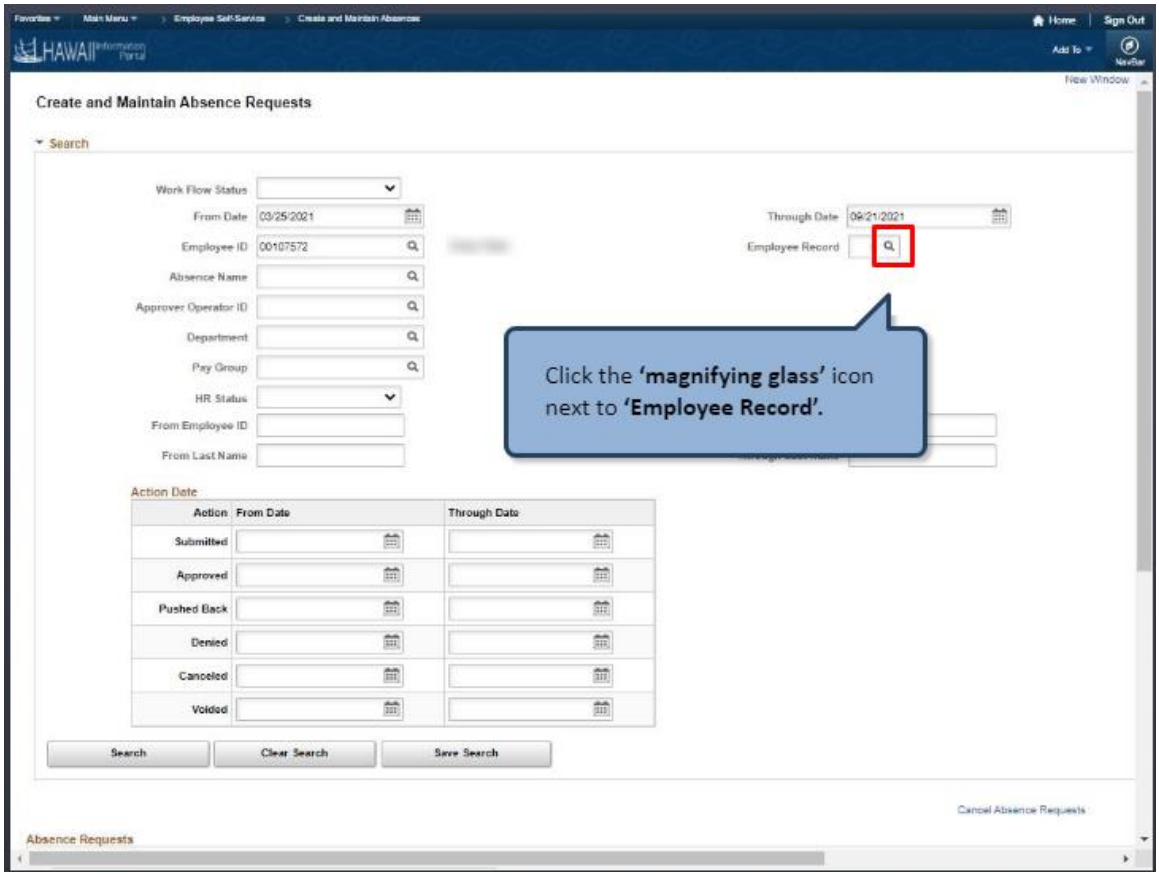
NOTE: It is important to also note the values shown in the Empl Record column.



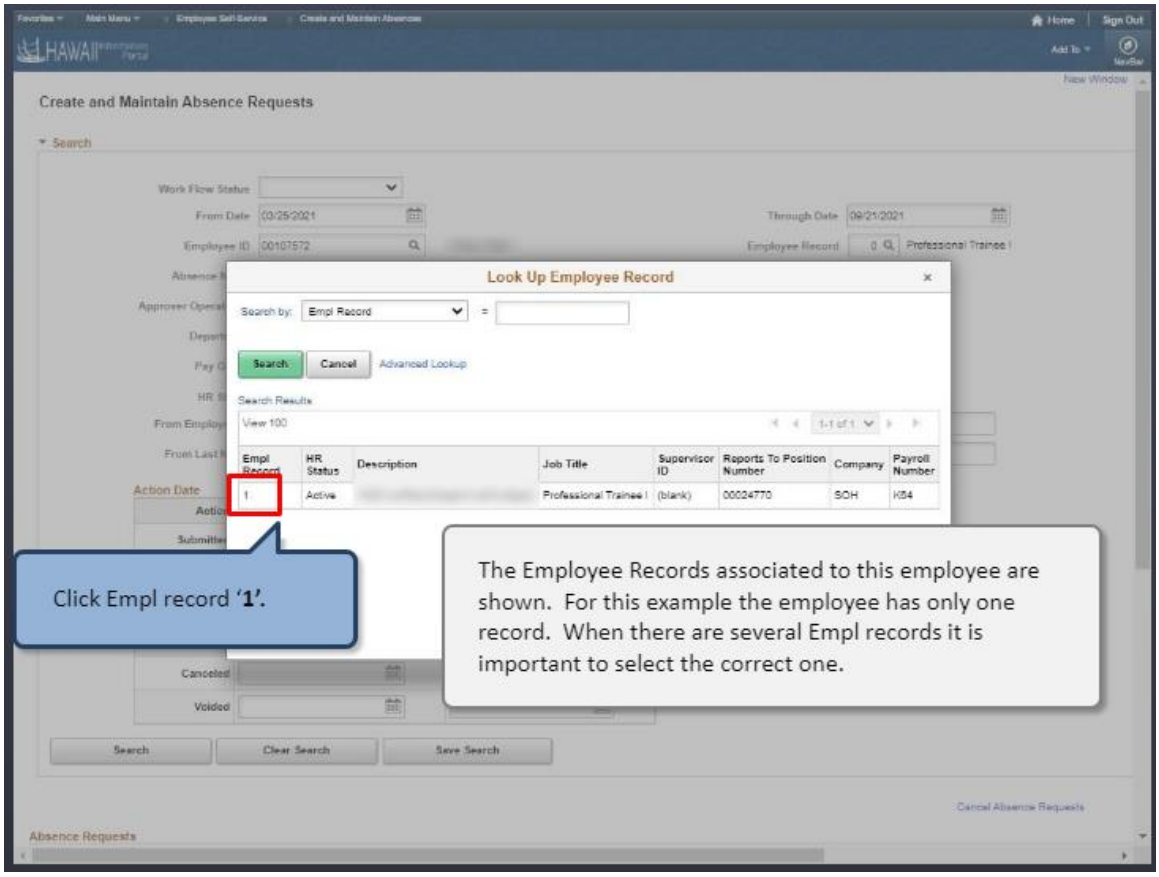
Click Empl ID **'00107572'** and note the Empl Record column shows a value of '**1**'**.**



The Employee ID field is populated and the Employee name is displayed at the right, next to the Employee ID value. Next we will look at the Employee Record as the correct record must be selected in order for the desired data to be retrieved.

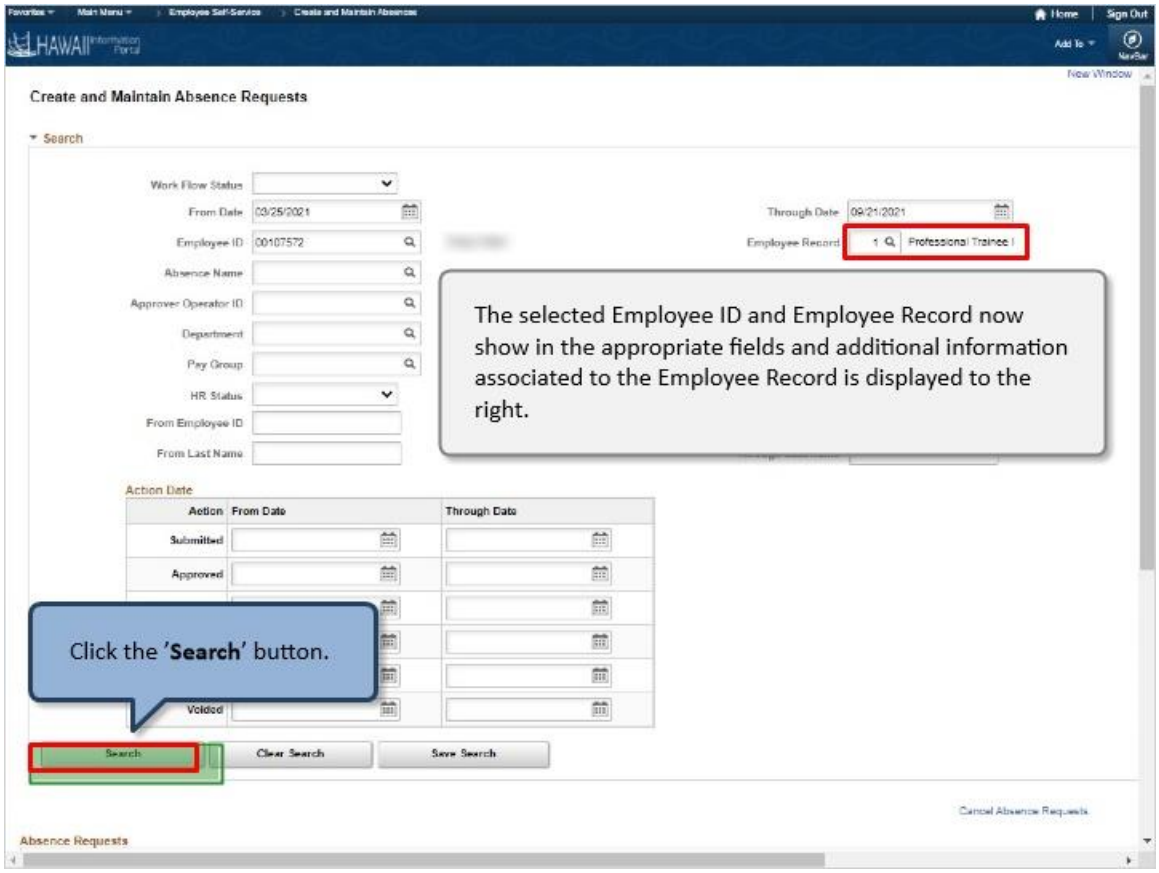


Click the **'magnifying glass'** icon next to **'Employee Record'.**



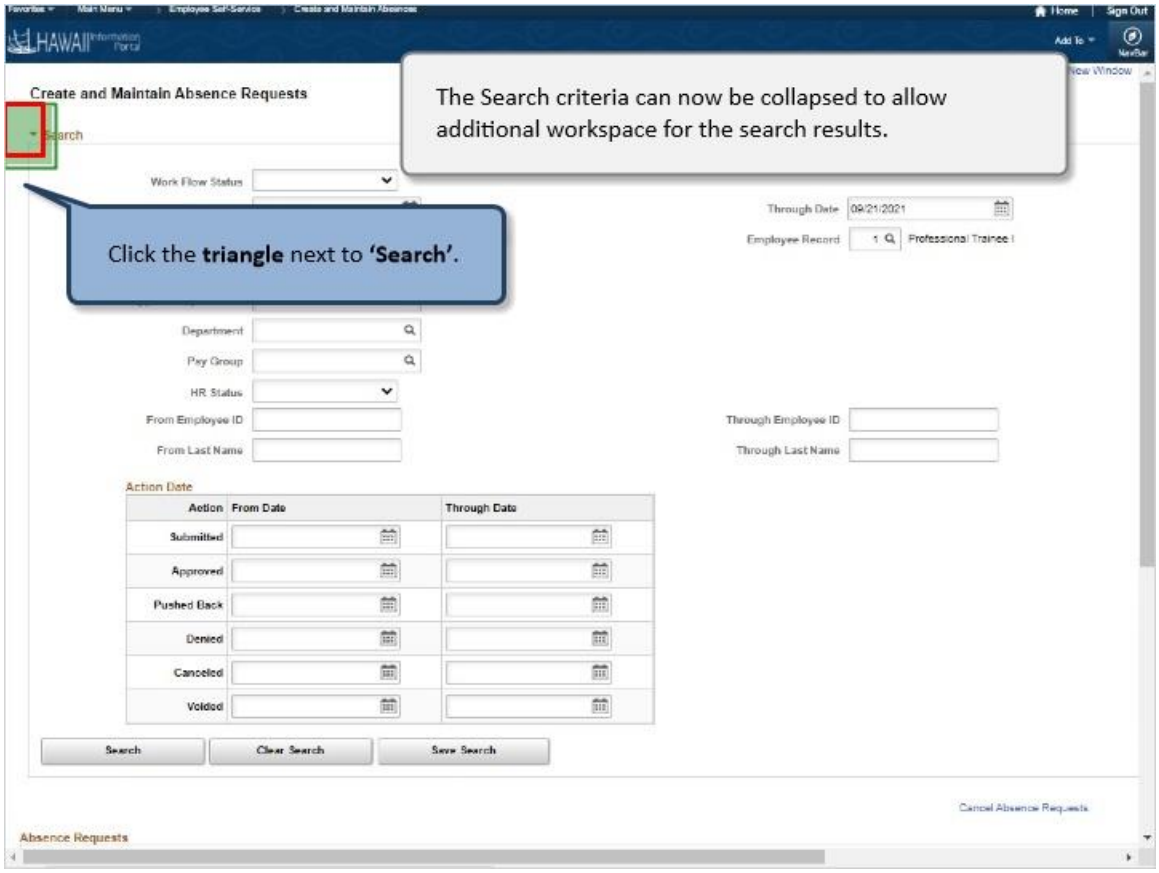
The Employee Records associated to this employee are shown. For this example the employee has only one record. When there are several Empl records it is important to select the correct one.

Click Empl record '**1'.**



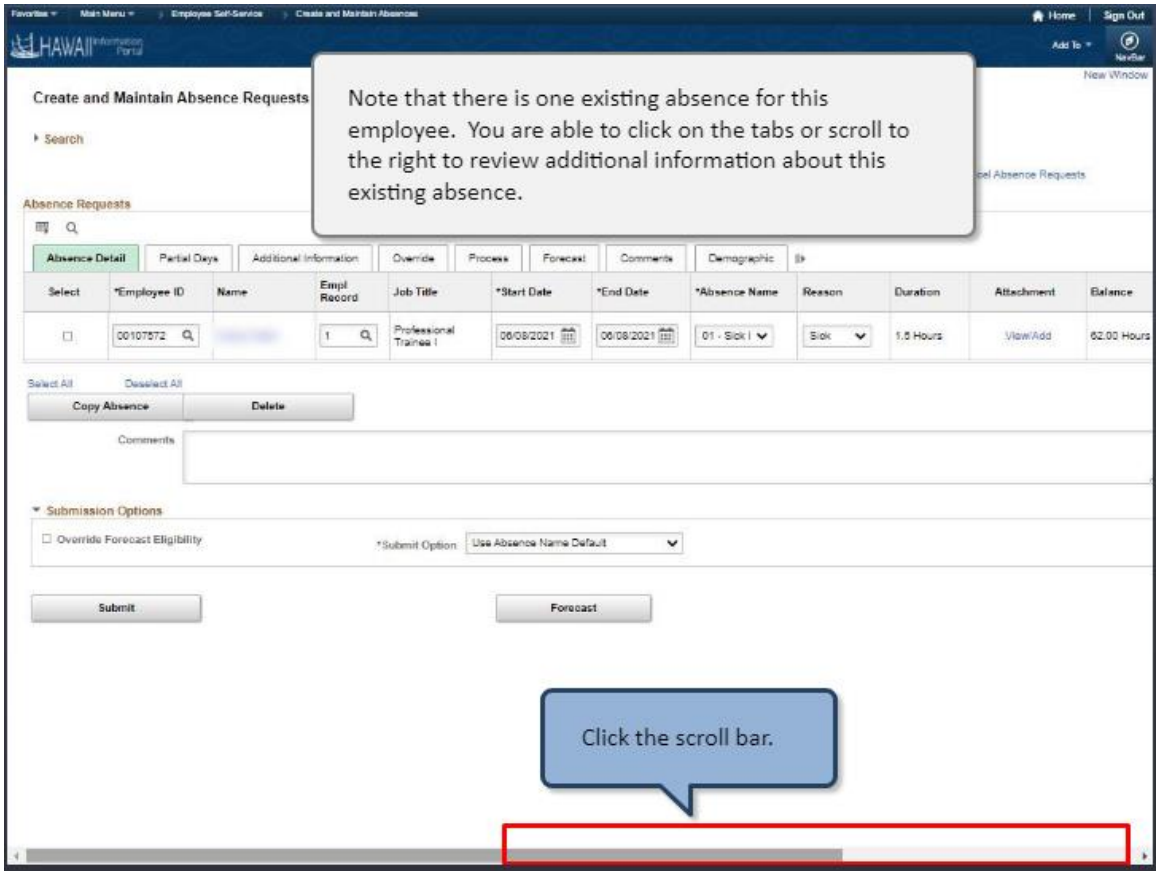
The selected Employee ID and Employee Record now show in the appropriate fields and additional information associated to the Employee Record is displayed to the right.

Click the '**Search**' button.



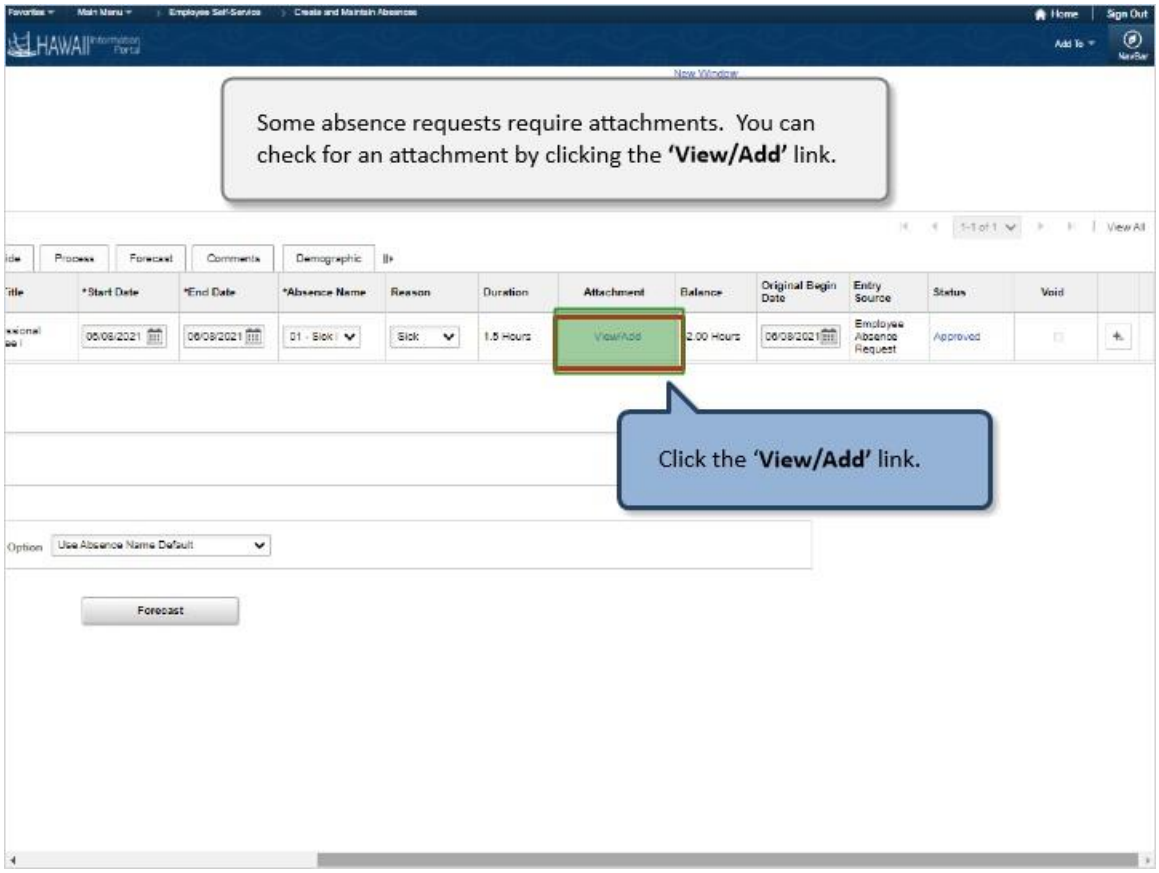
The Search criteria can now be collapsed to allow additional workspace for the search results.

Click the **triangle** next to **'Search'**.



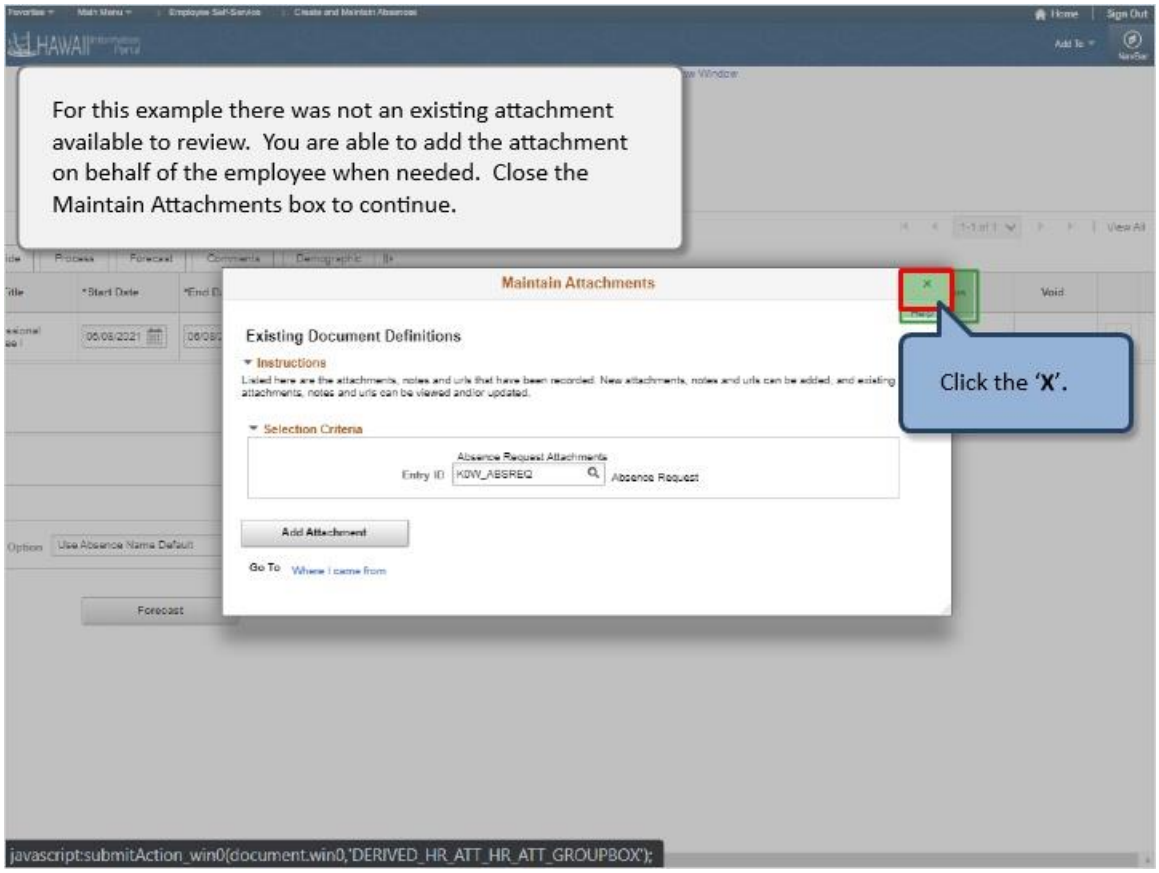
Note that there is one existing absence for this employee. You are able to click on the tabs or scroll to the right to review additional information about this existing absence.

Click the scroll bar.



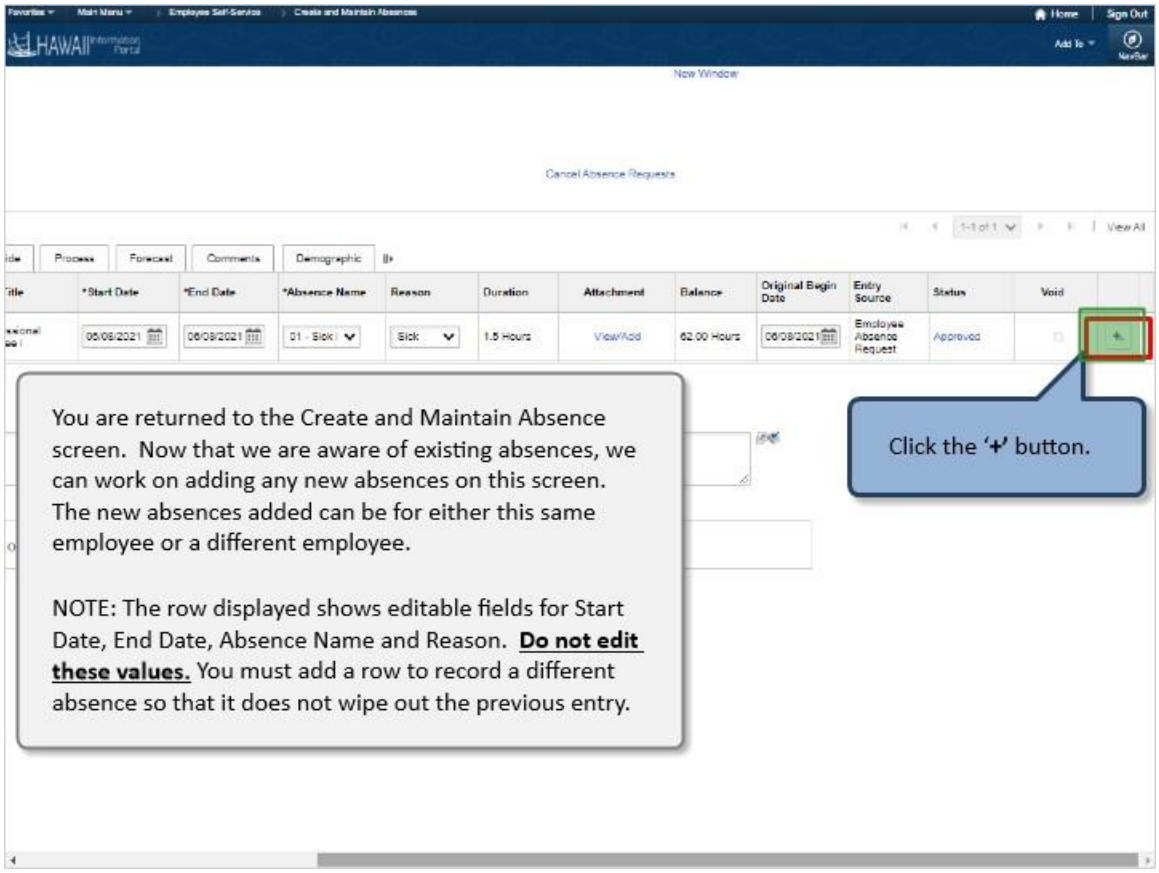
Some absence requests require attachments. You can check for an attachment by clicking the **'View/Add'** link.

Click the '**View/Add'** link.



For this example there was not an existing attachment available to review. You are able to add the attachment on behalf of the employee when needed. Close the Maintain Attachments box to continue.

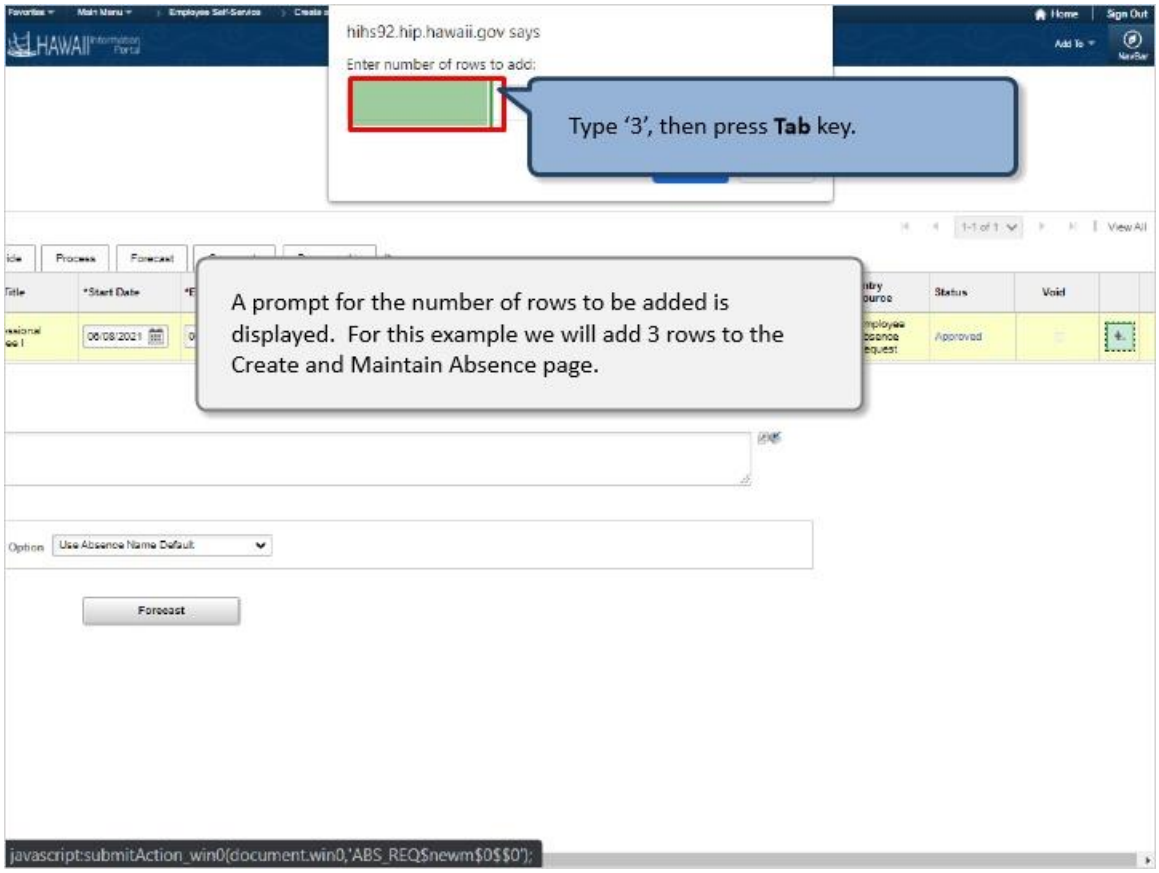
Click the '**X**'**.**



You are returned to the Create and Maintain Absence screen. Now that we are aware of existing absences, we can work on adding any new absences on this screen. The new absences added can be for either this same employee or a different employee.

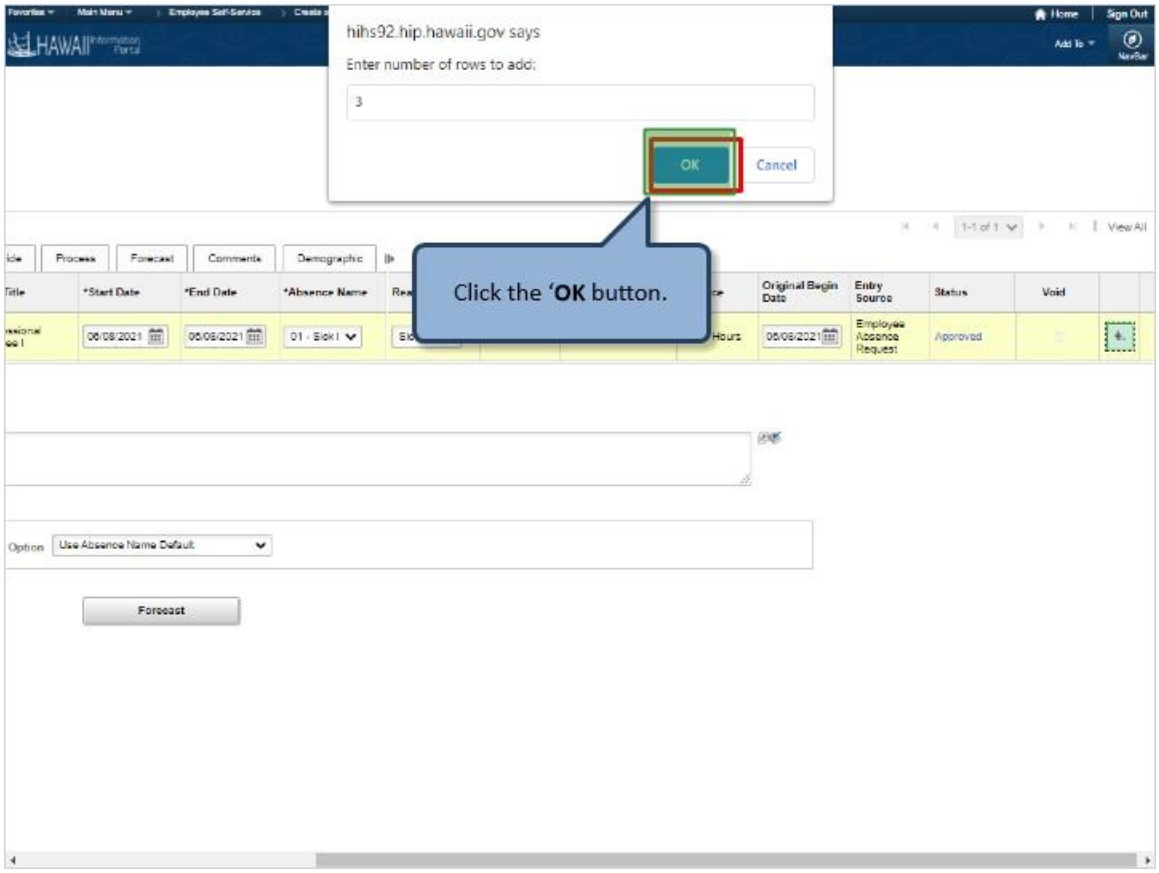
NOTE: The row displayed shows editable fields for Start Date, End Date, Absence Name and Reason. **Do not edit these values.** You must add a row to record a different absence so that it does not wipe out the previous entry.

Click the '**+**' button.

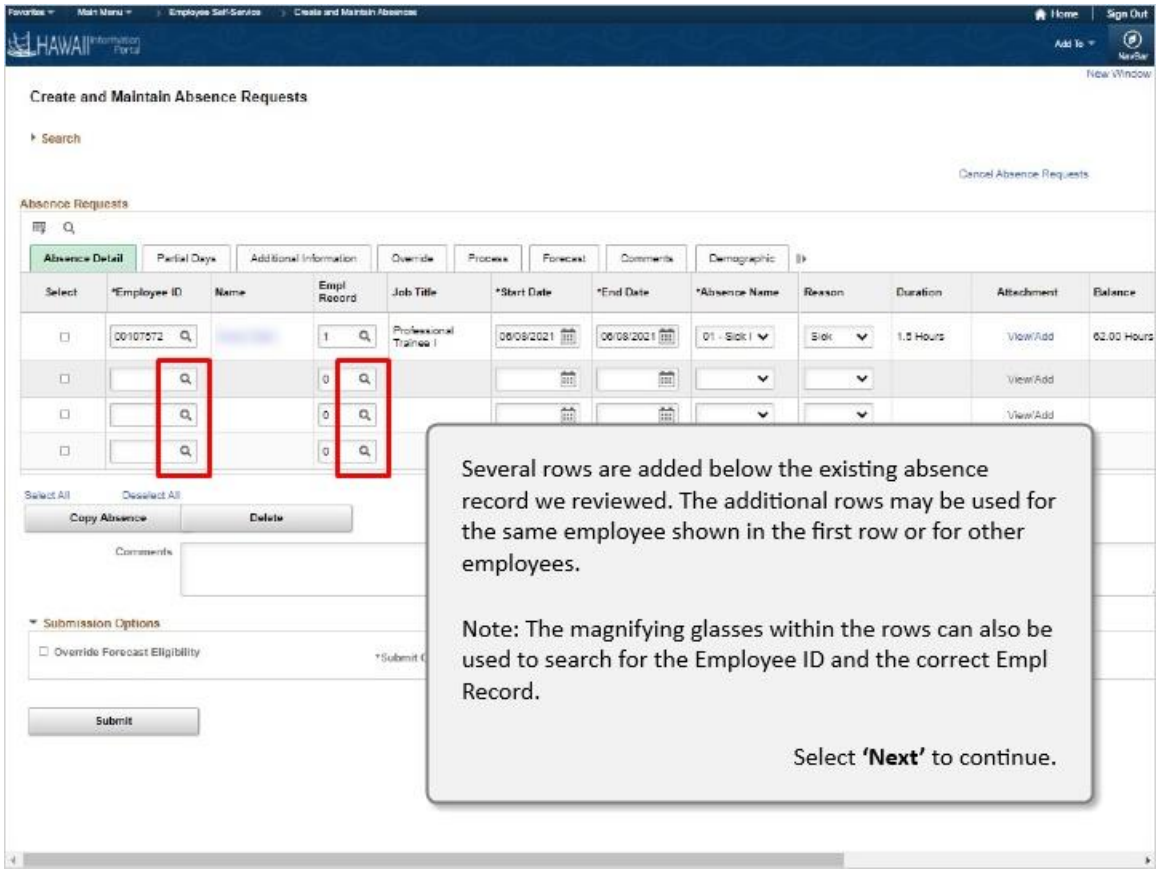


A prompt for the number of rows to be added is displayed. For this example we will add 3 rows to the Create and Maintain Absence page.

Type '3', then press **Tab** key.

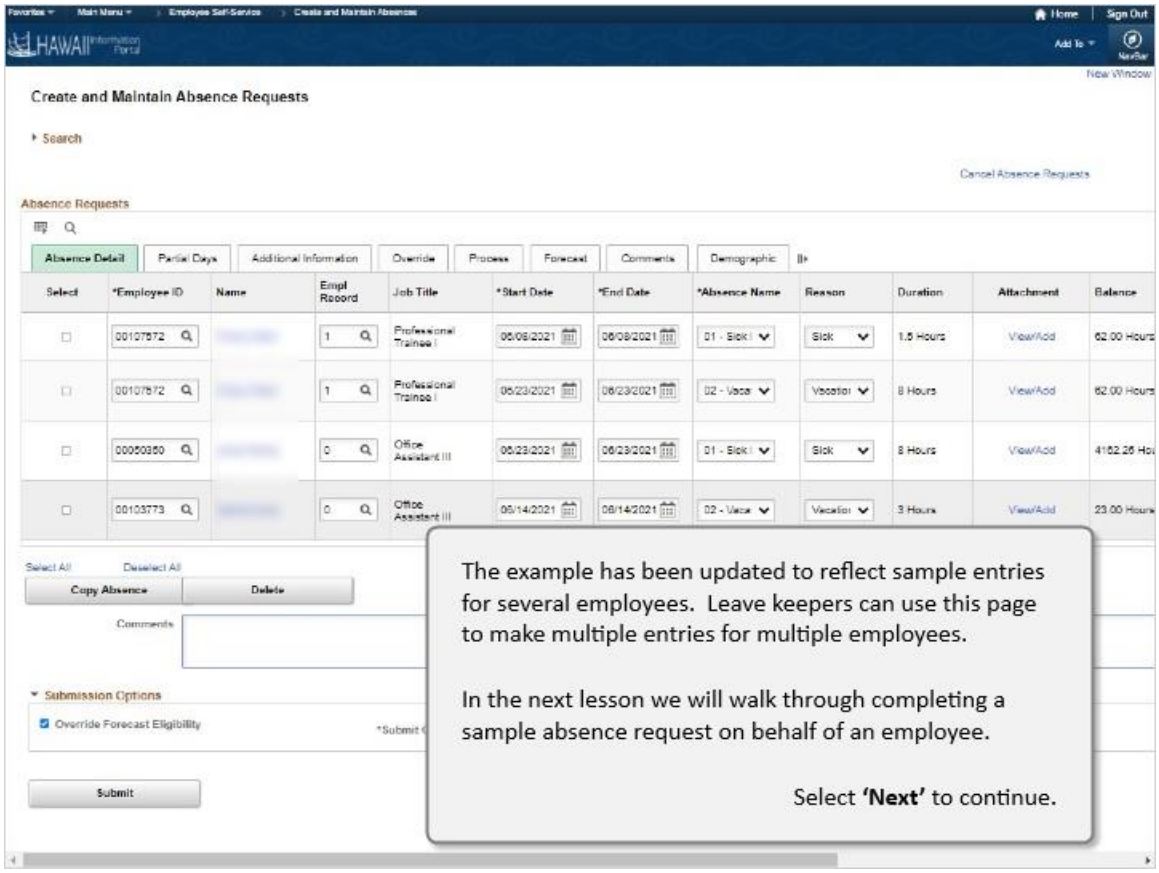


Click the '**OK** button.



Several rows are added below the existing absence record we reviewed. The additional rows may be used for the same employee shown in the first row or for other employees.

Note: The magnifying glasses within the rows can also be used to search for the Employee ID and the correct Empl Record.



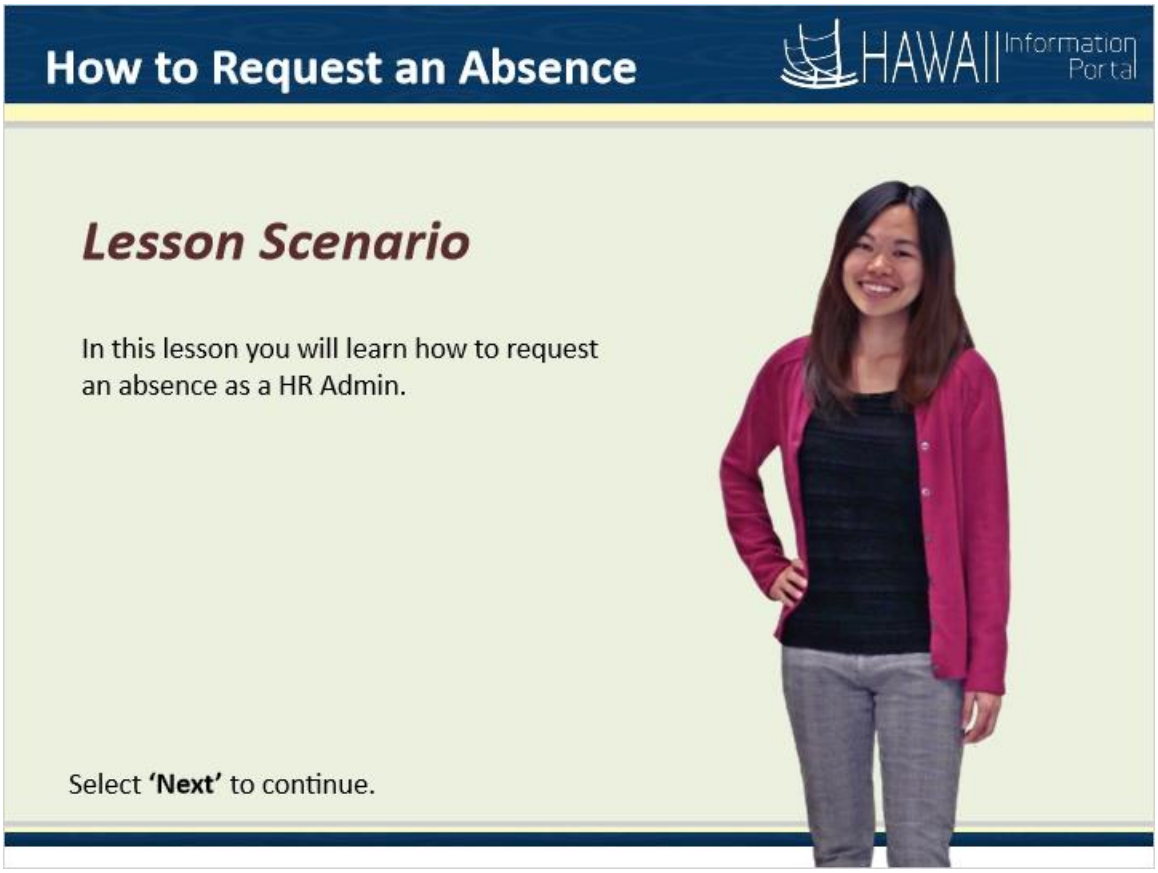
The example has been updated to reflect sample entries for several employees. Leave keepers can use this page to make multiple entries for multiple employees.

In the next lesson we will walk through completing a sample absence request on behalf of an employee.

Congratulations!

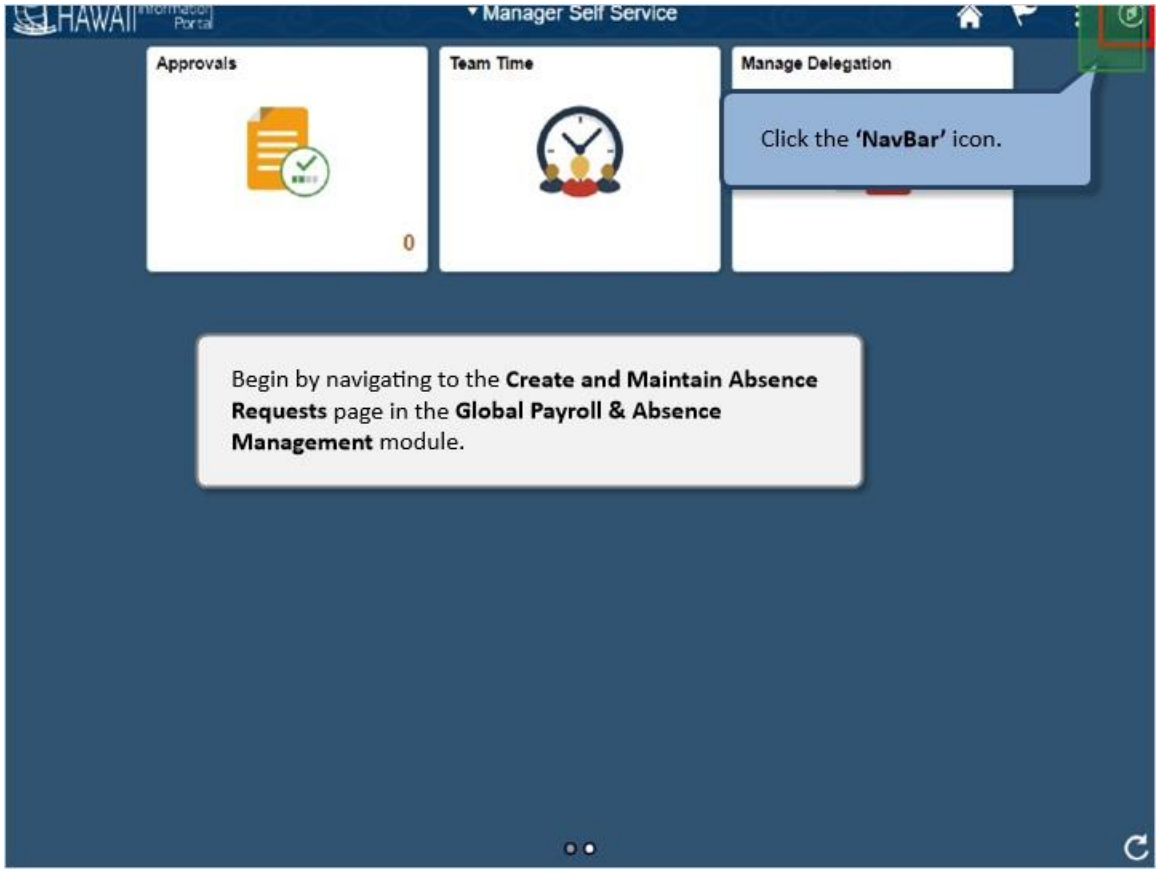
You've successfully completed this lesson.

HOW TO REQUEST AN ABSENCE



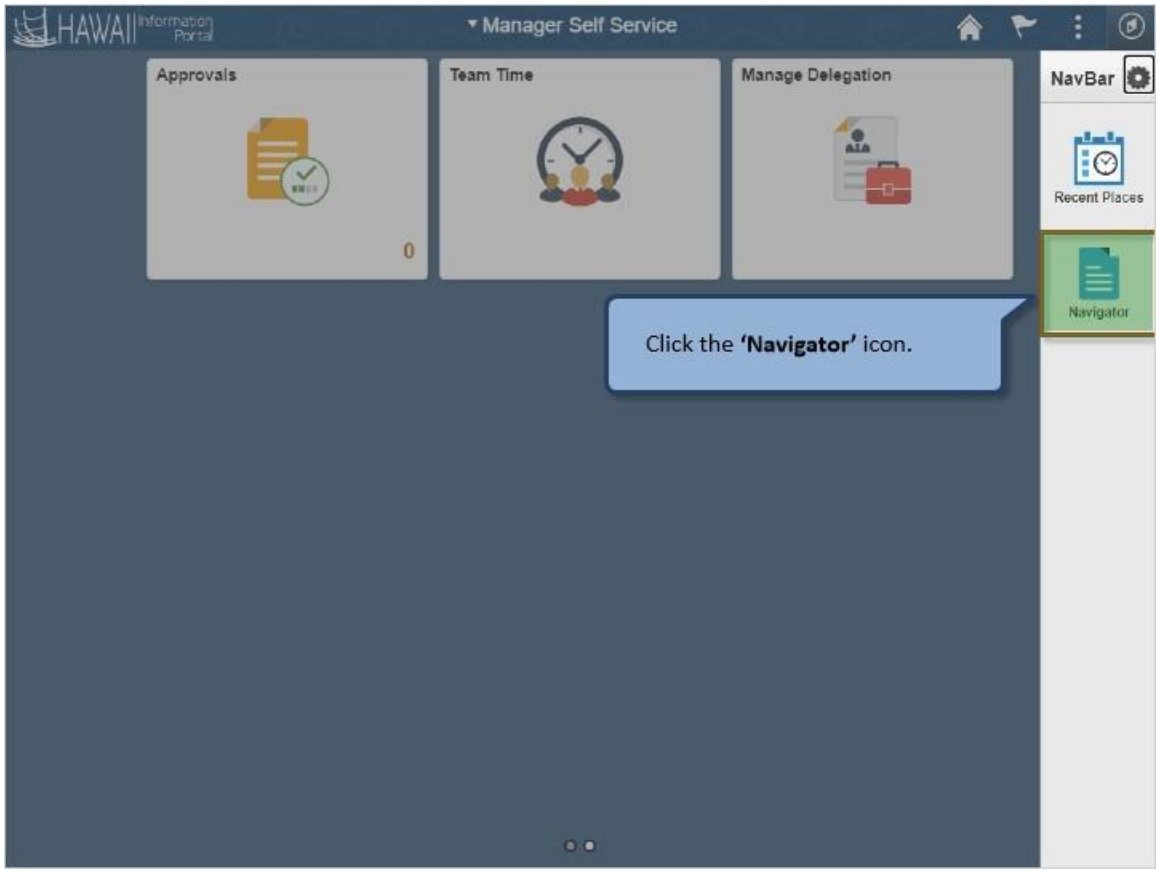
Lesson Scenario

In this lesson you will learn how to request an absence as a HR Admin

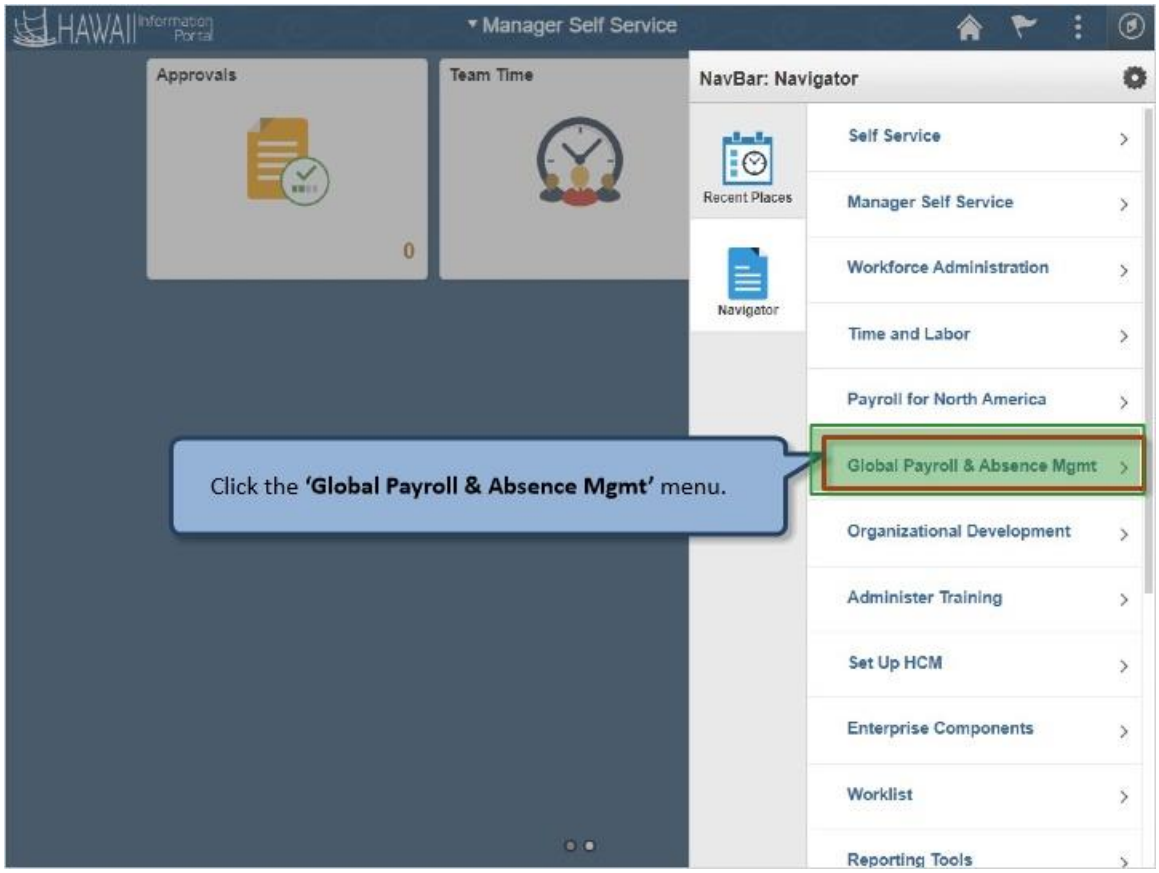


Begin by navigating to the **Create and Maintain Absence Requests** page in the **Global Payroll & Absence Management** module.

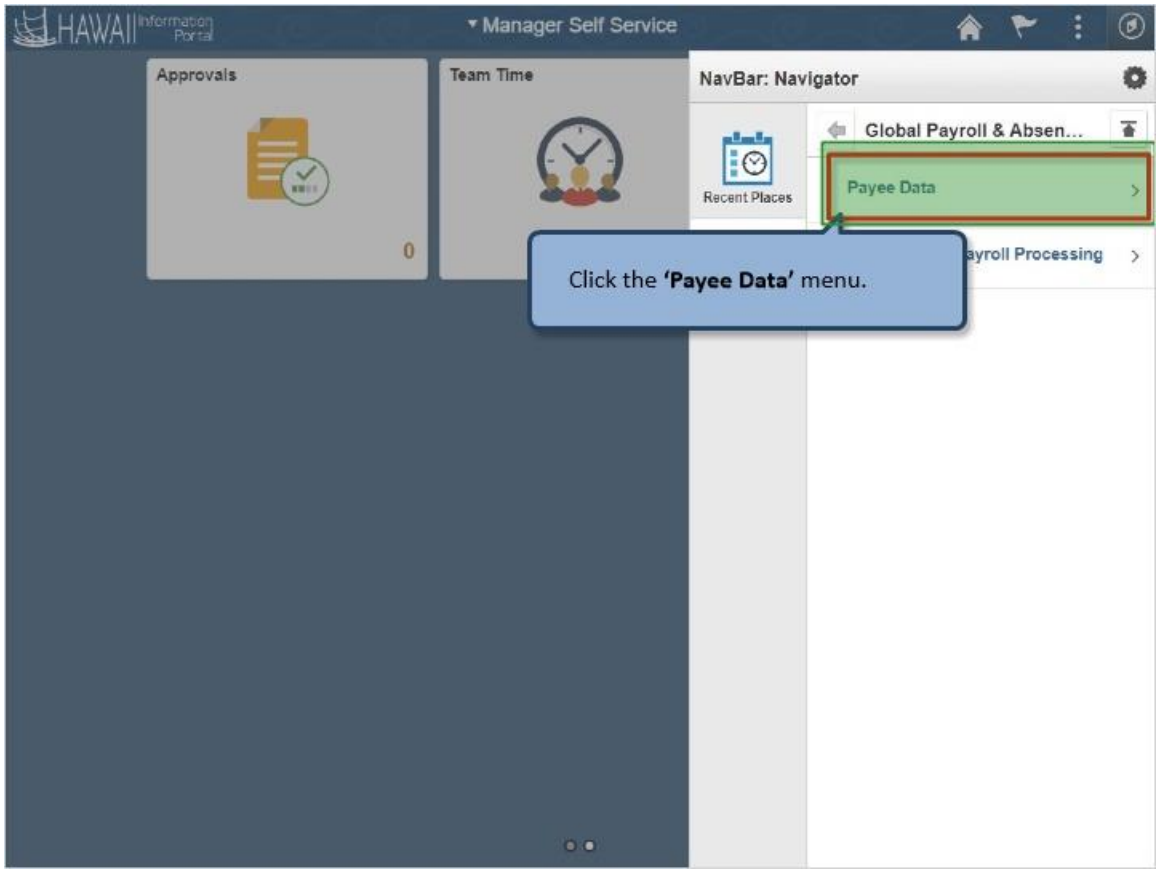
Click the **'NavBar'** icon.



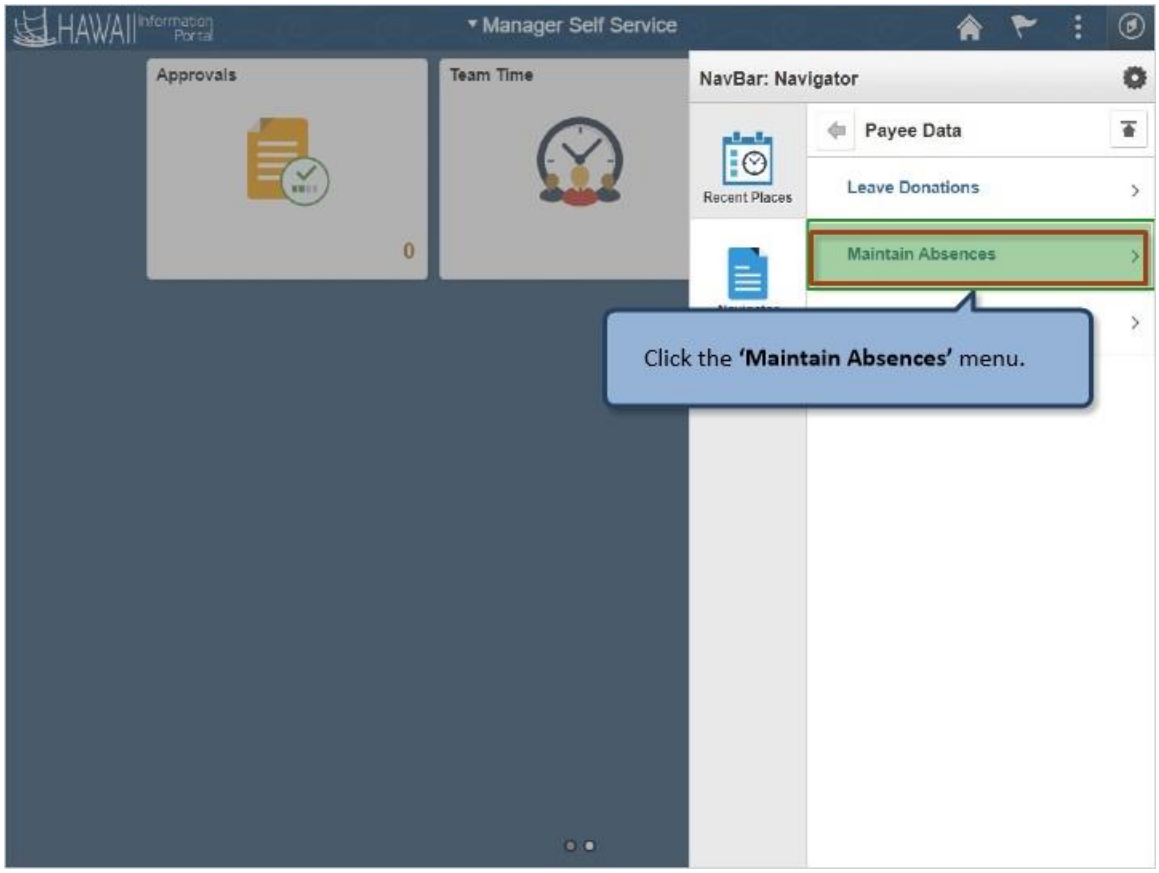
Click the **'Navigator'** icon.



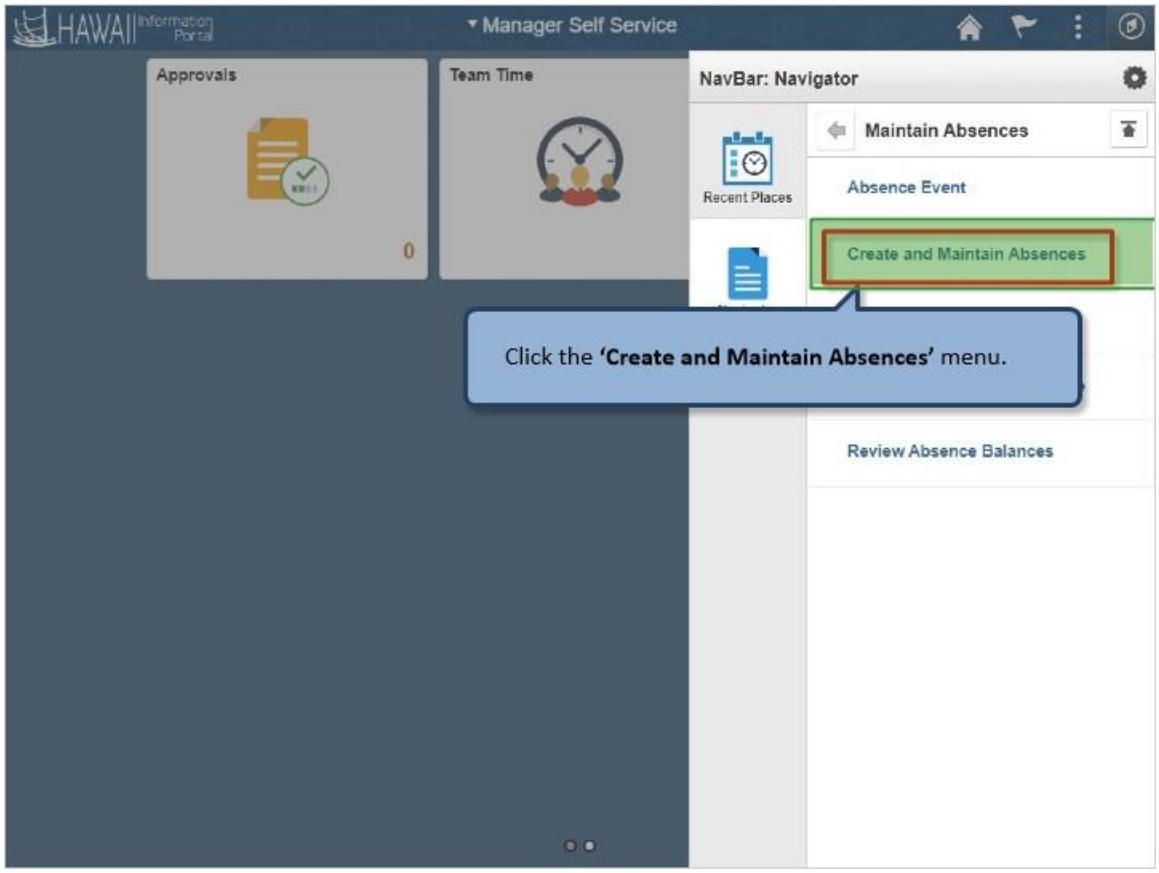
Click the **'Global Payroll & Absence Mgmt'** menu.



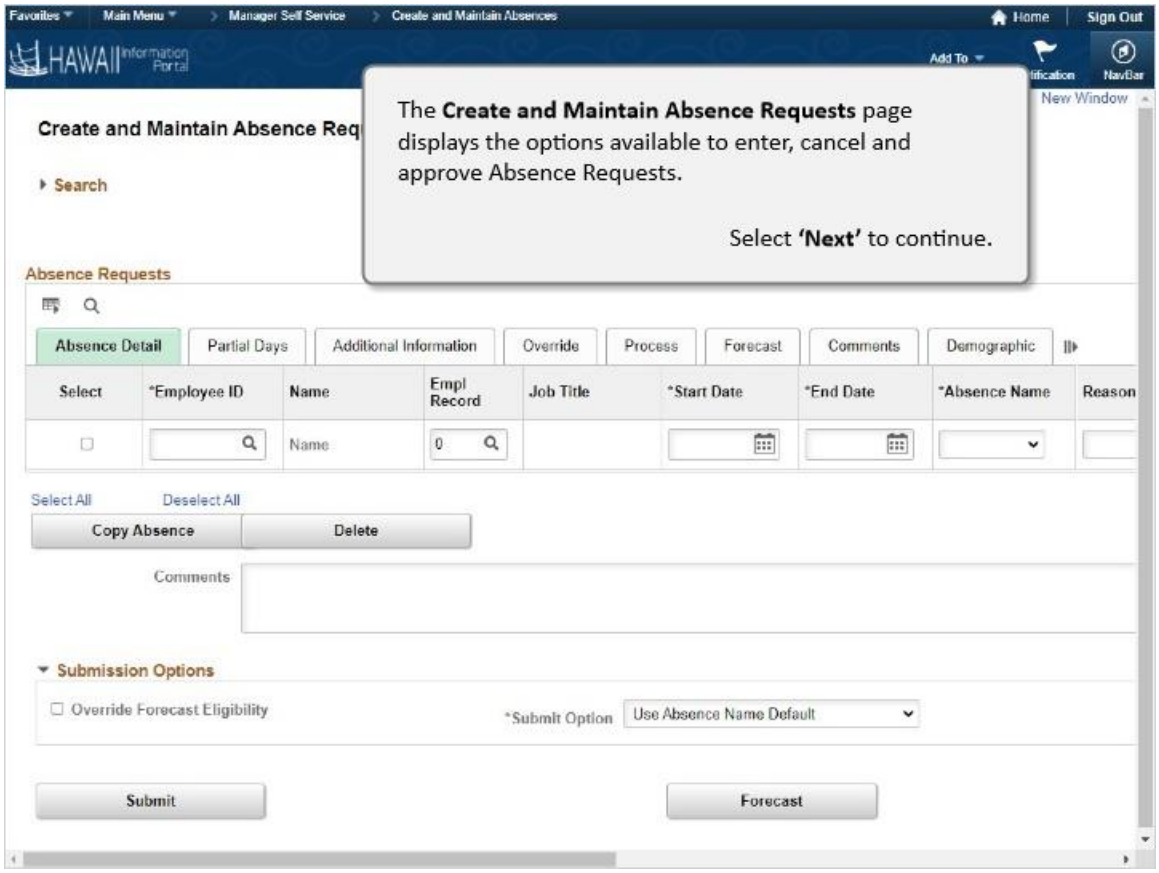
Click the **'Payee Data'** menu.



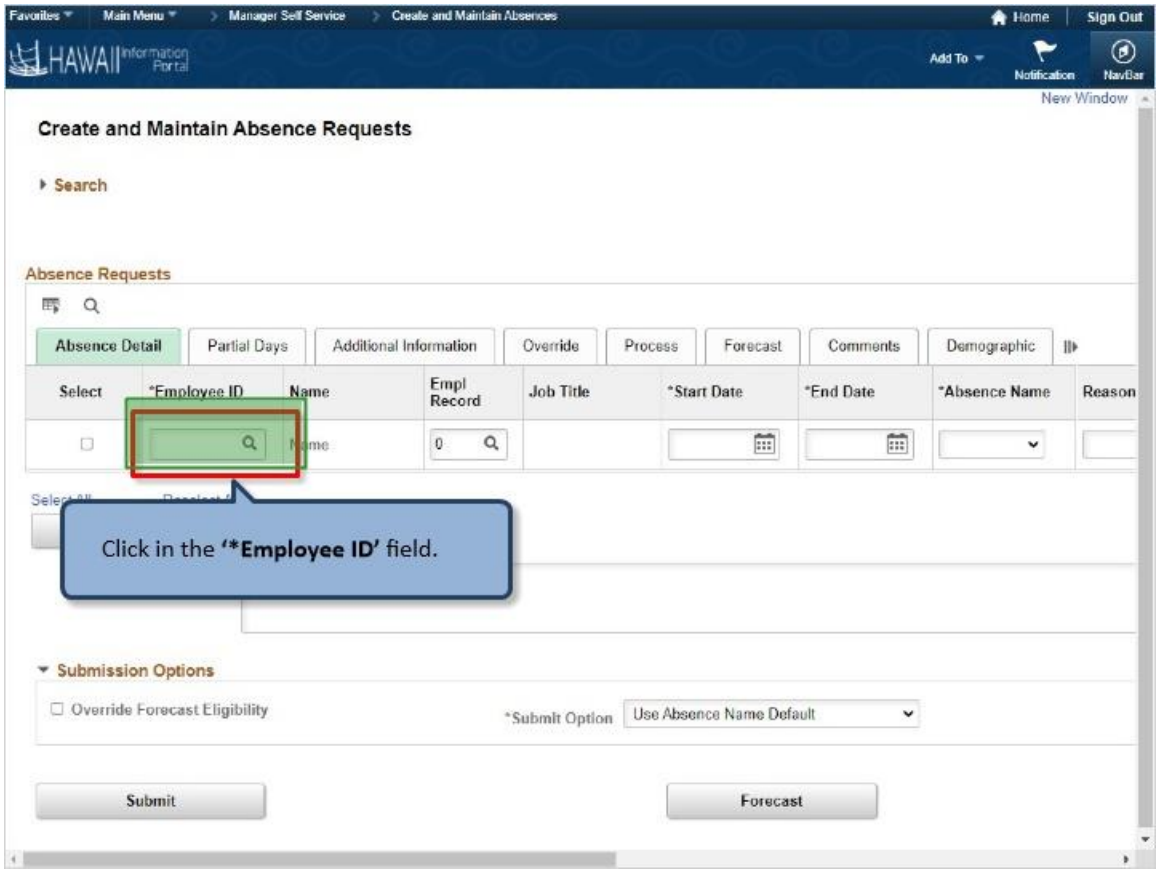
Click the **'Maintain Absences'** menu.



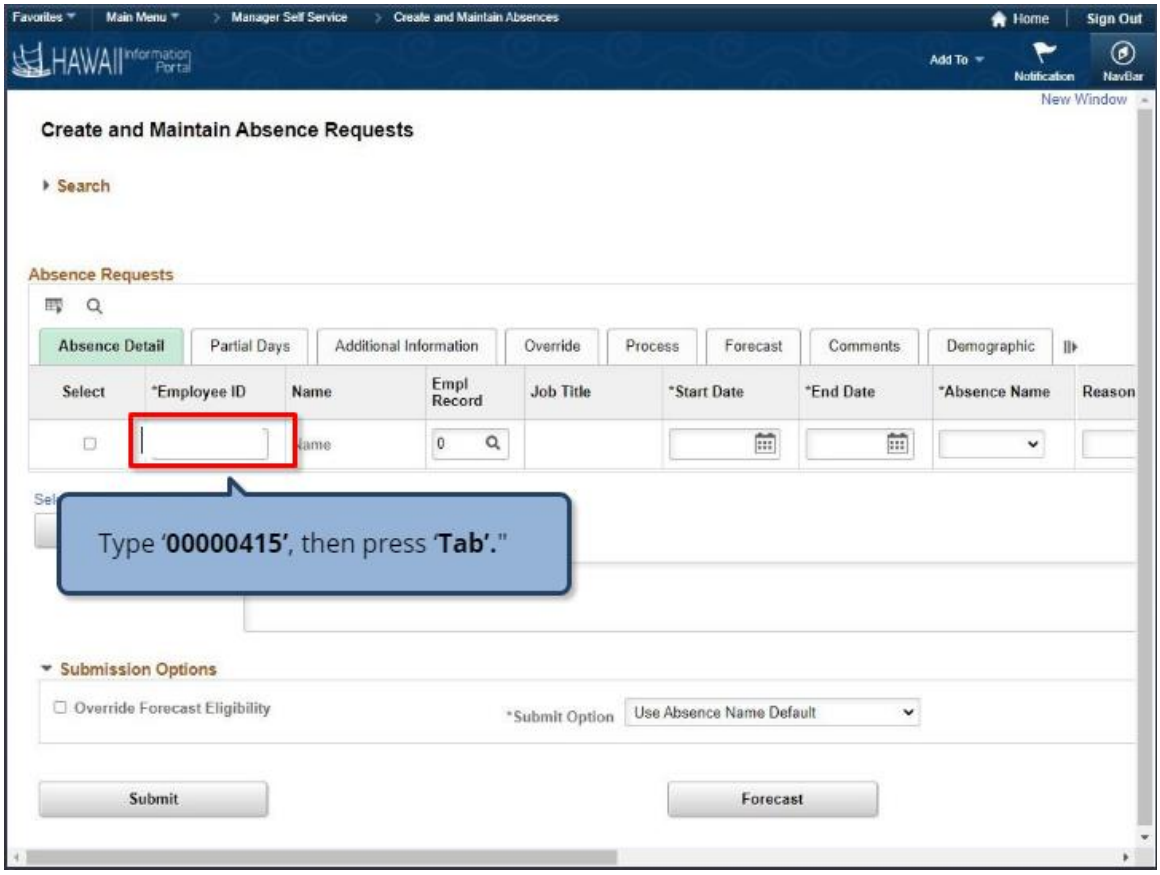
Click the **'Create and Maintain Absences'** menu.



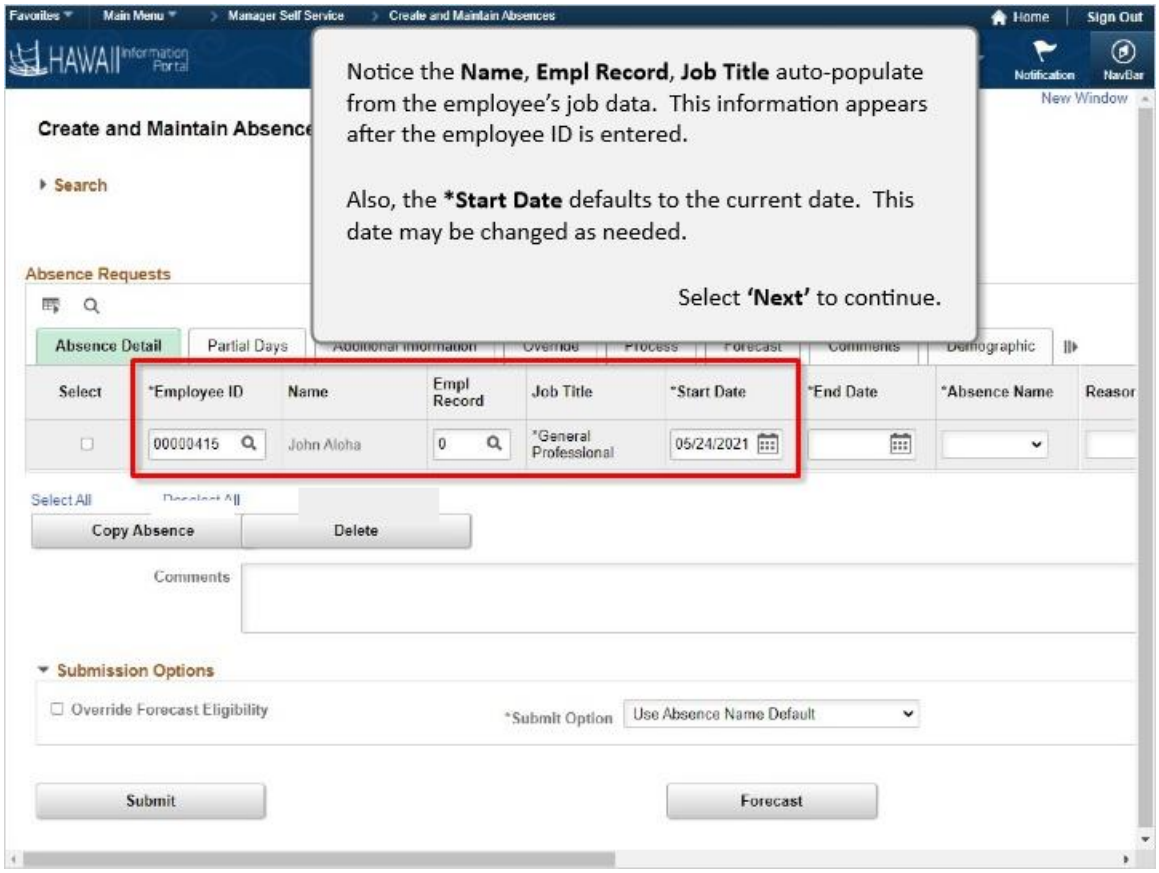
The **Create and Maintain Absence Requests** page displays the options available to enter, cancel and approve Absence Requests.



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

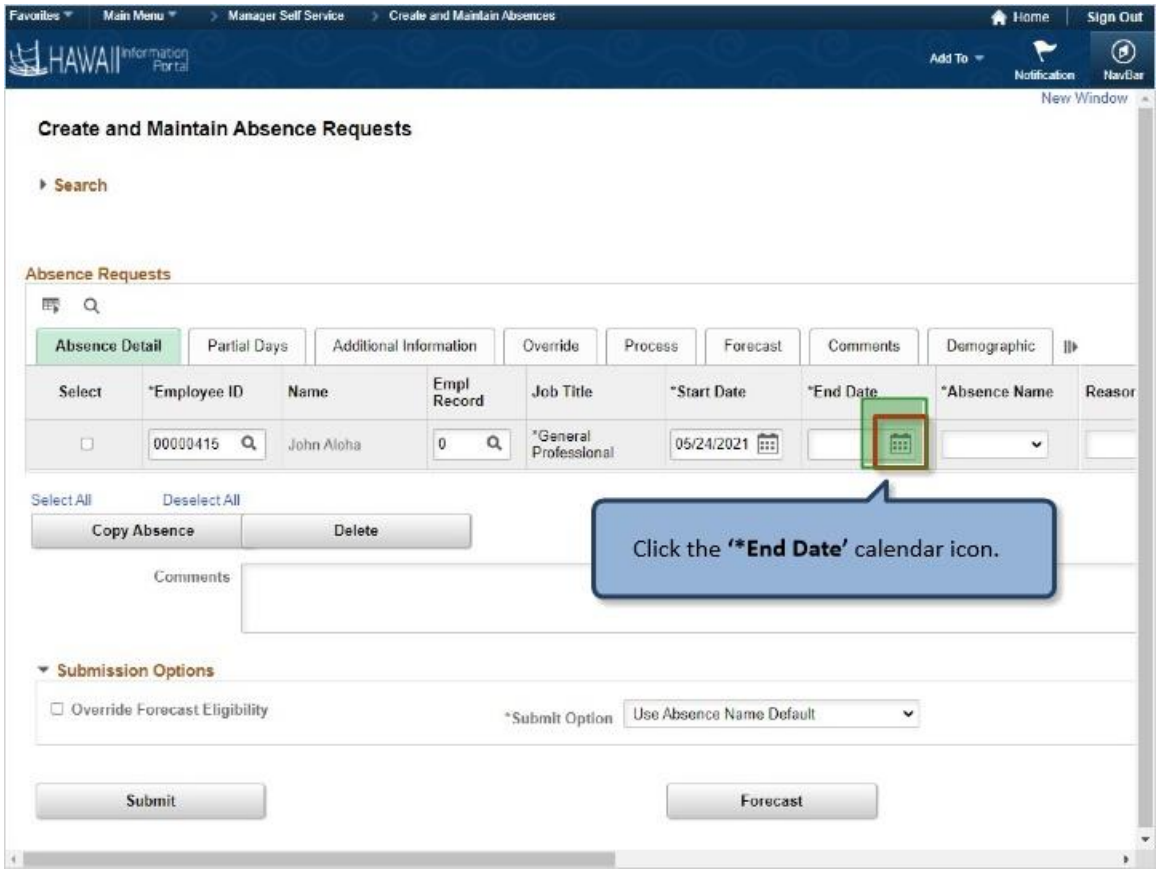


Type **'00000415**', then press **'Tab**'.

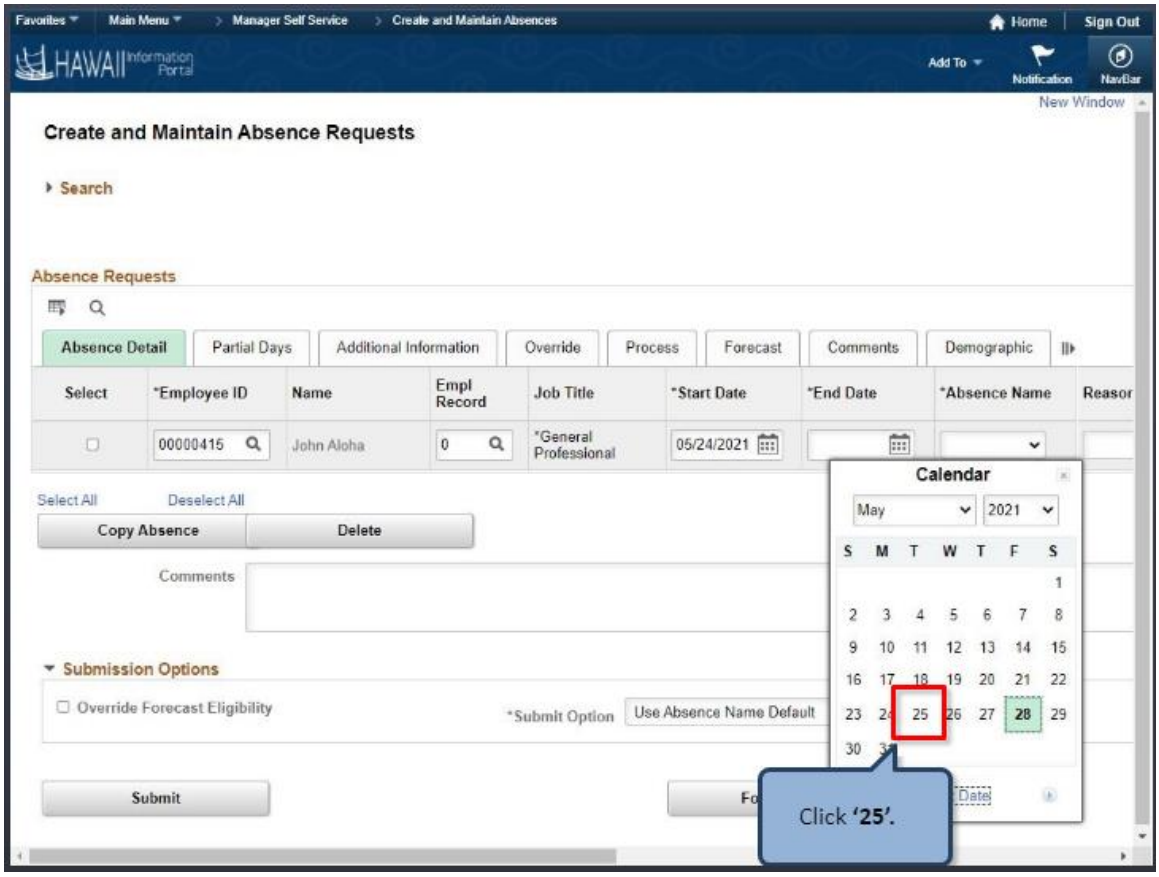


Notice the **Name**, **Empl Record**, **Job Title** auto-populate from the employee's job data. This information appears after the employee ID is entered.

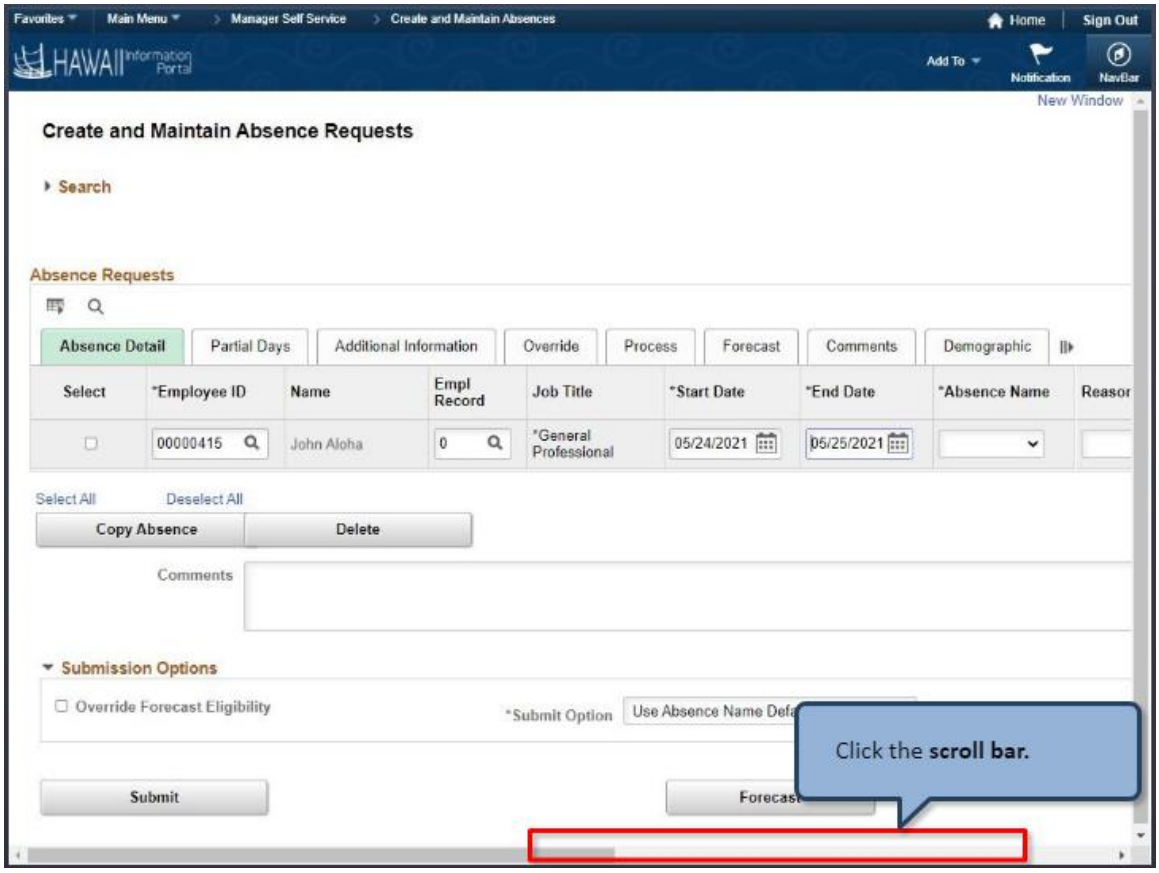
Also, the ***Start Date** defaults to the current date. This date may be changed as needed.



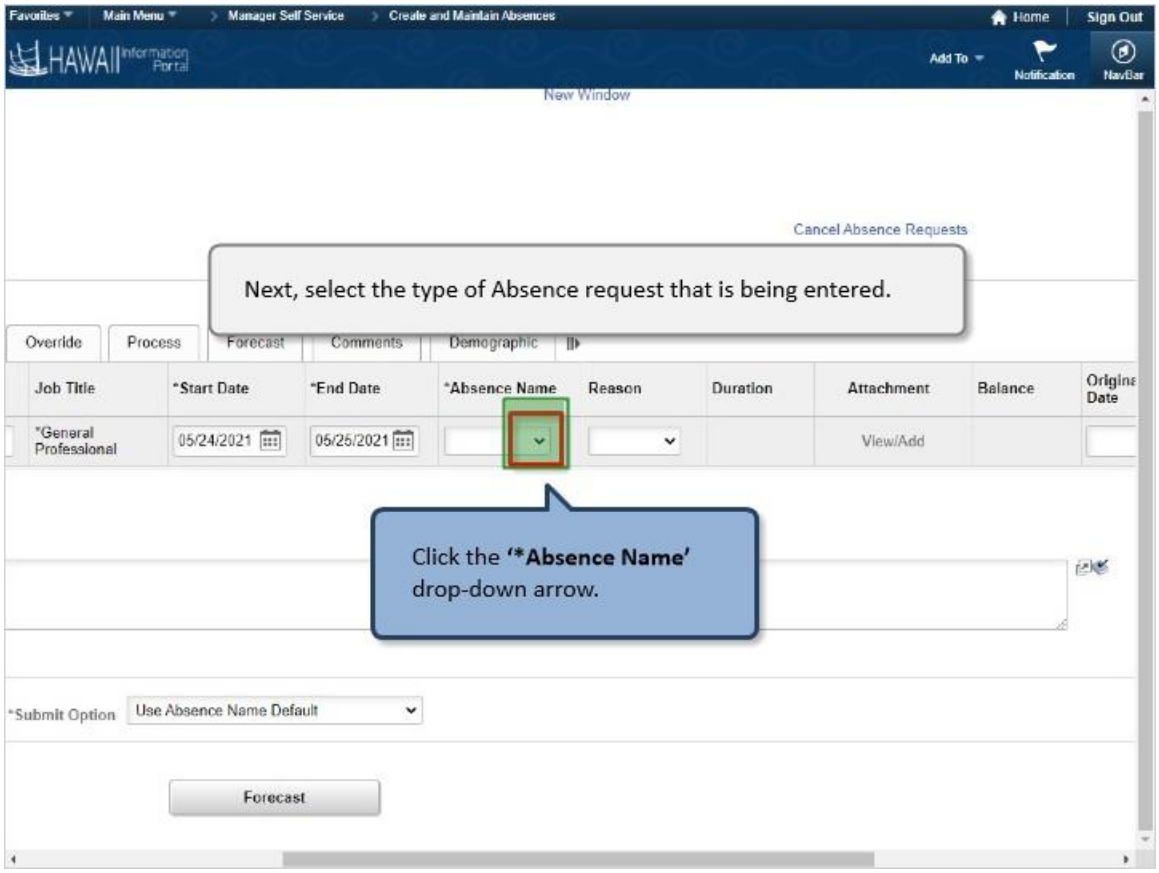
Click the **'*End Date'** calendar icon.


Favorites
Main Menu
Manager Self Service
Create and Maintain Absences
Home
Sign Out
Add To
Notification
NavBar
New Window
Create and Maintain Absence Requests
Search
Absence Requests
Absence Detail
Partial Days
Additional Information
Override
Process
Forecast
Comments
Demographic
Select
*Employee ID
Name
Empl Record
Job Title
*Start Date
*End Date
*Absence Name
00000415
John Aloha
0
*General Professional
05/24/2021
Select All
Deselect All
Copy Absence
Delete
Comments
Submission Options
Override Forecast Eligibility
*Submit Option
Use Absence Name Default
Submit
Calendar
May
2021
S M T W T F S
Click '25'.

Click **'25'.**

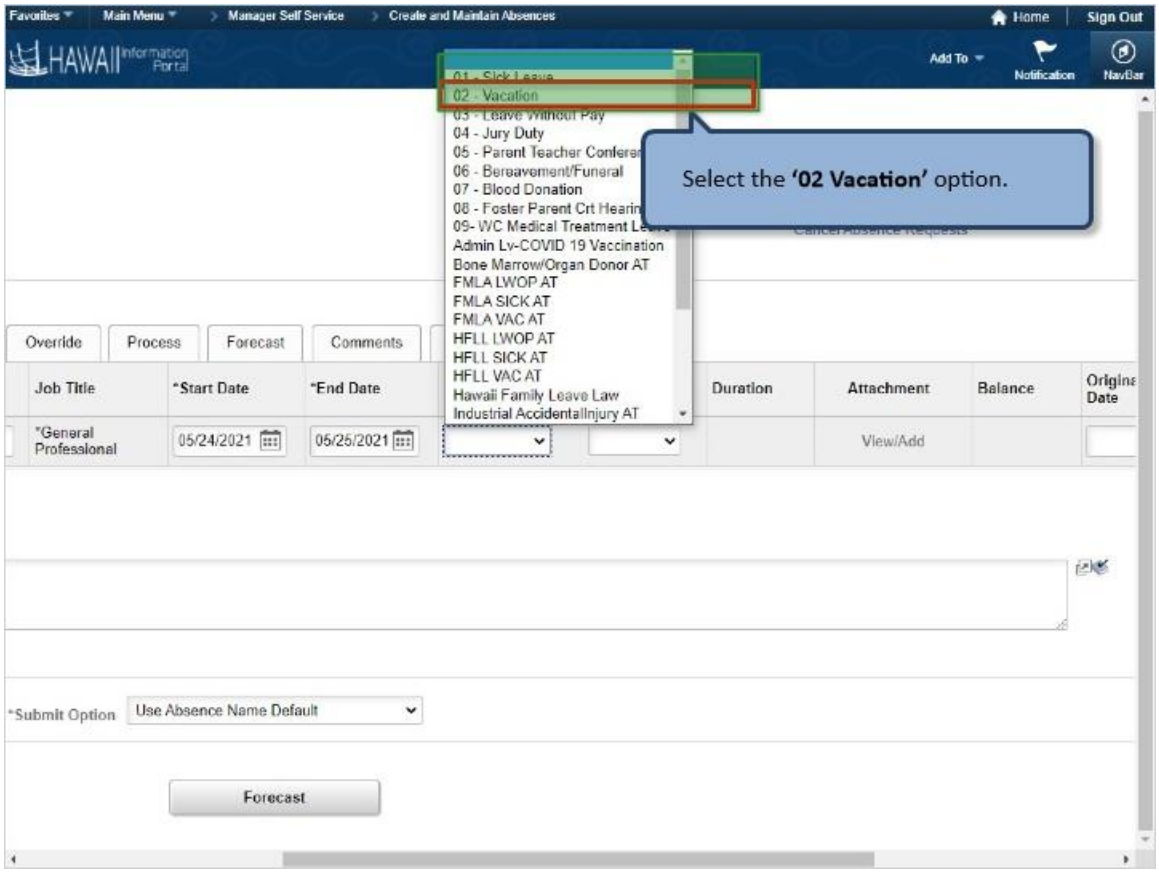


Click the **scroll bar.**

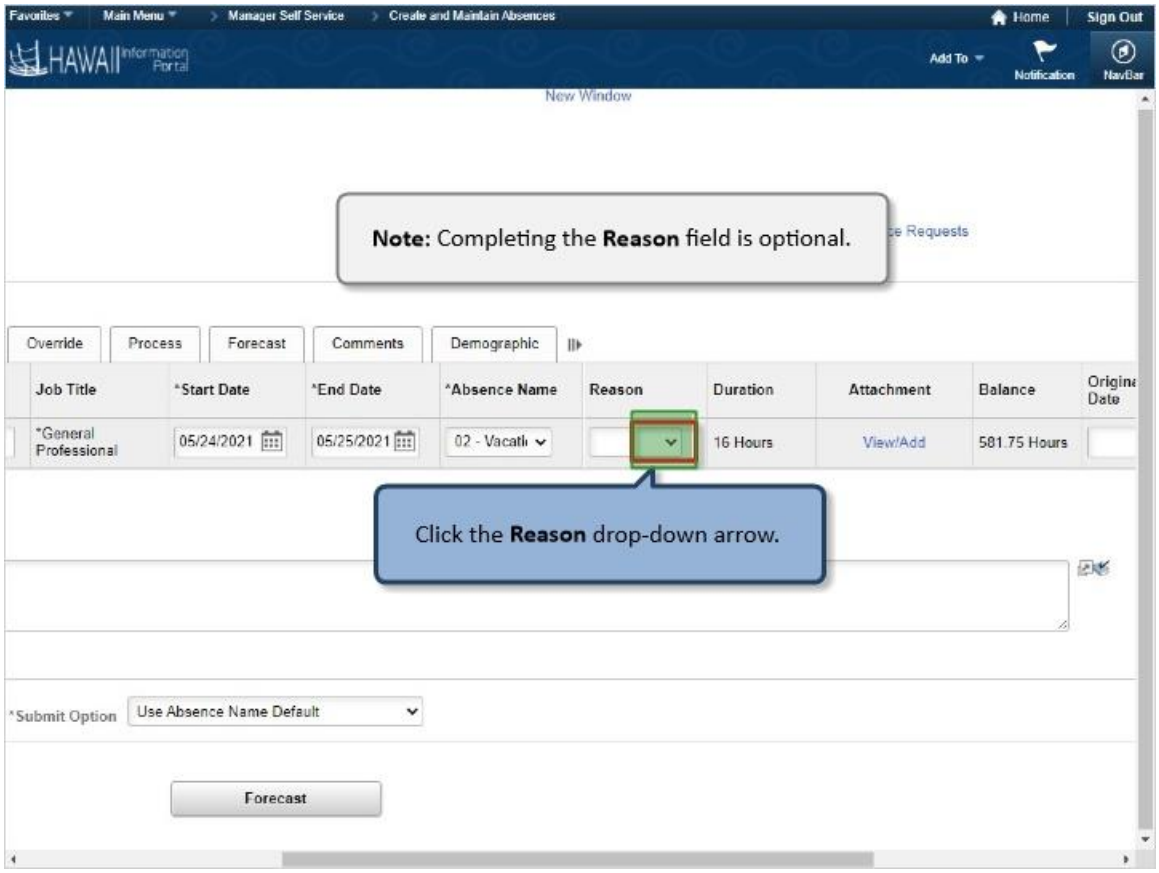


Next, select the type of Absence request that is being entered.

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

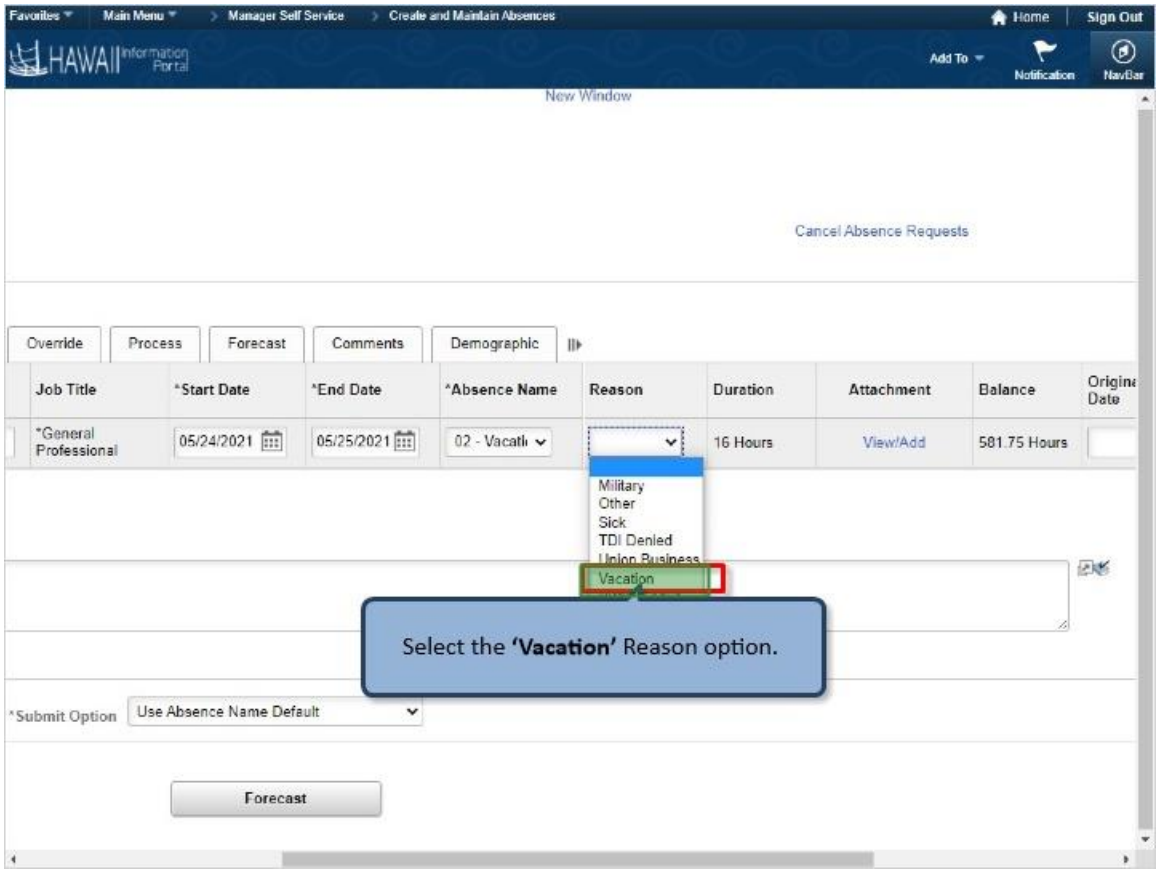


Select the **'02 Vacation'** option.

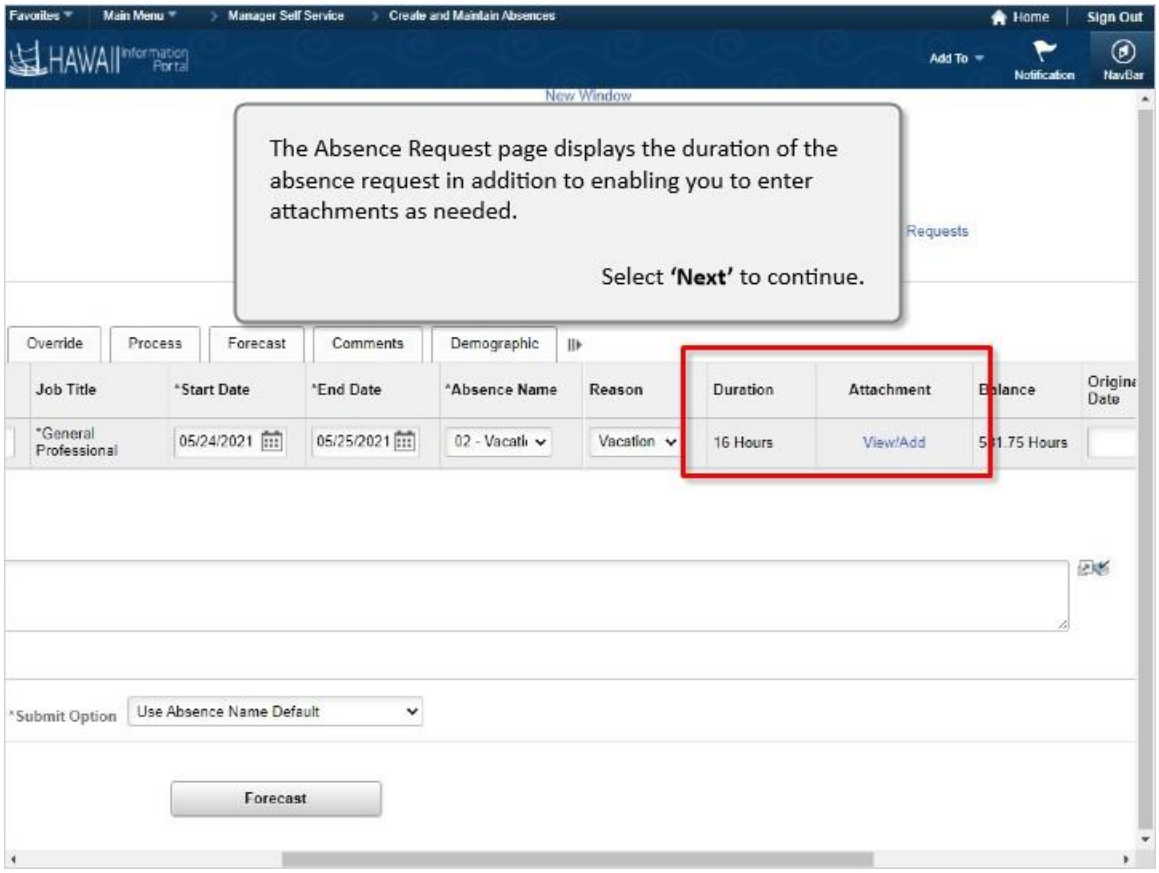


Note: Completing the **Reason** field is optional.

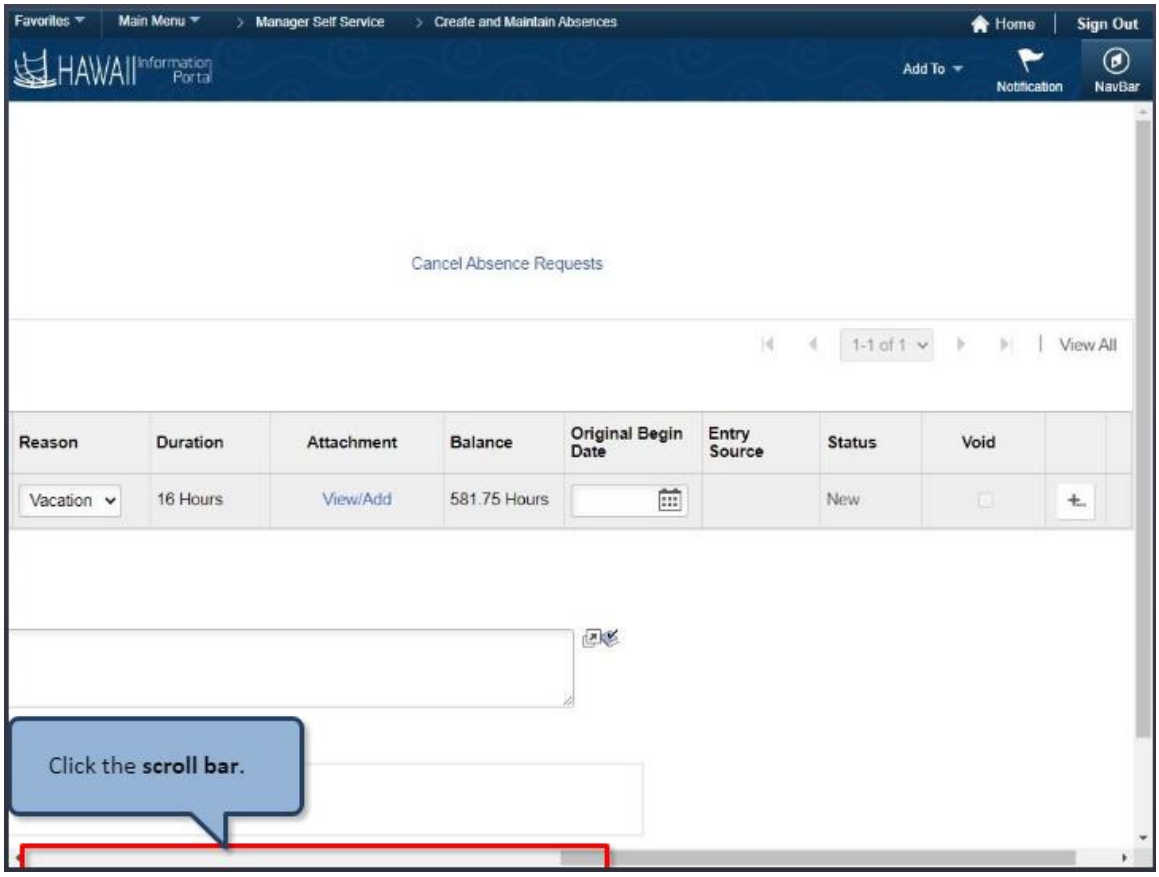
Click the **Reason** drop-down arrow.



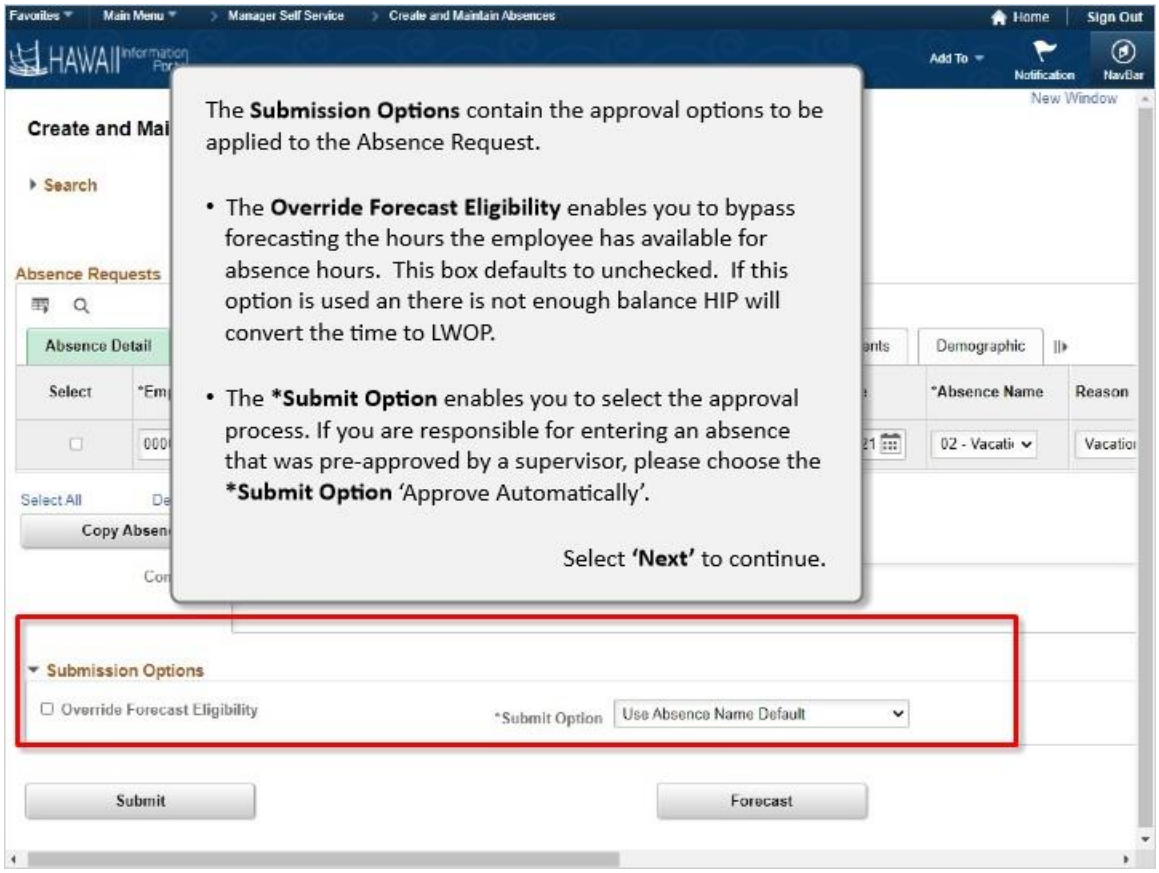
Select the **'Vacation'** Reason option.



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



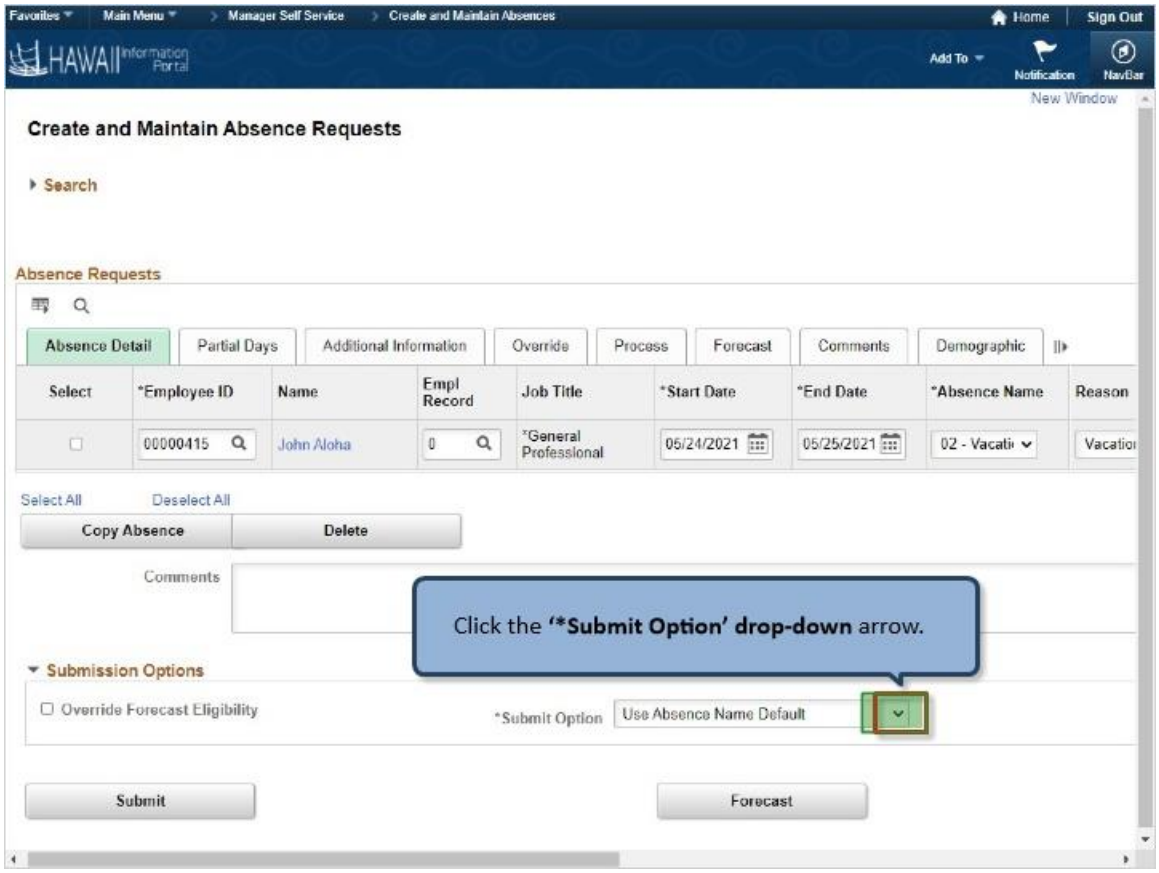
Click the **scroll bar**.



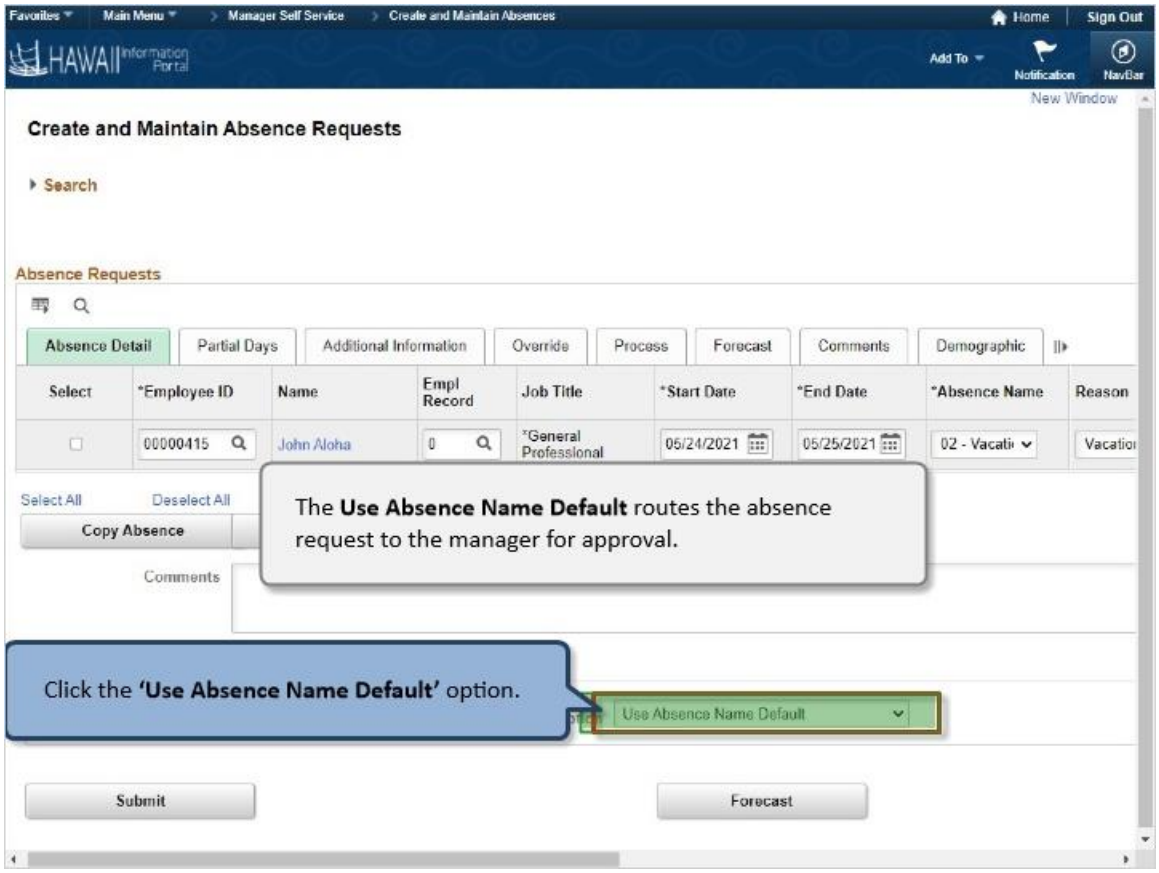
The **Submission Options** contain the approval options to be applied to the Absence Request.

- The **Override Forecast Eligibility** enables you to bypass forecasting the hours the employee has available for absence hours. This box defaults to unchecked. If this option is used an there is not enough balance HIP will convert the time to LWOP.

- The ***Submit Option** enables you to select the approval process. If you are responsible for entering an absence that was pre-approved by a supervisor, please choose the ***Submit Option** 'Approve Automatically'.

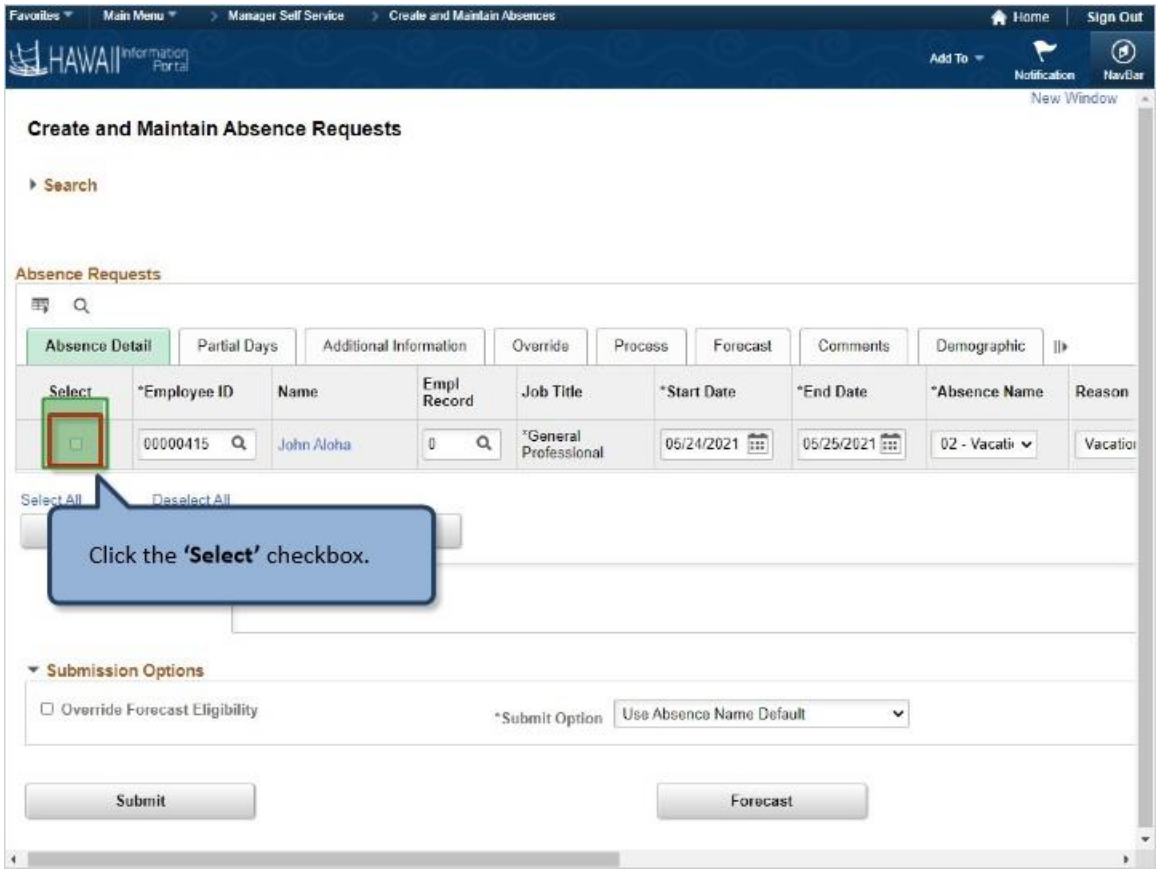


Click the **'*Submit Option'** drop-down arrow.

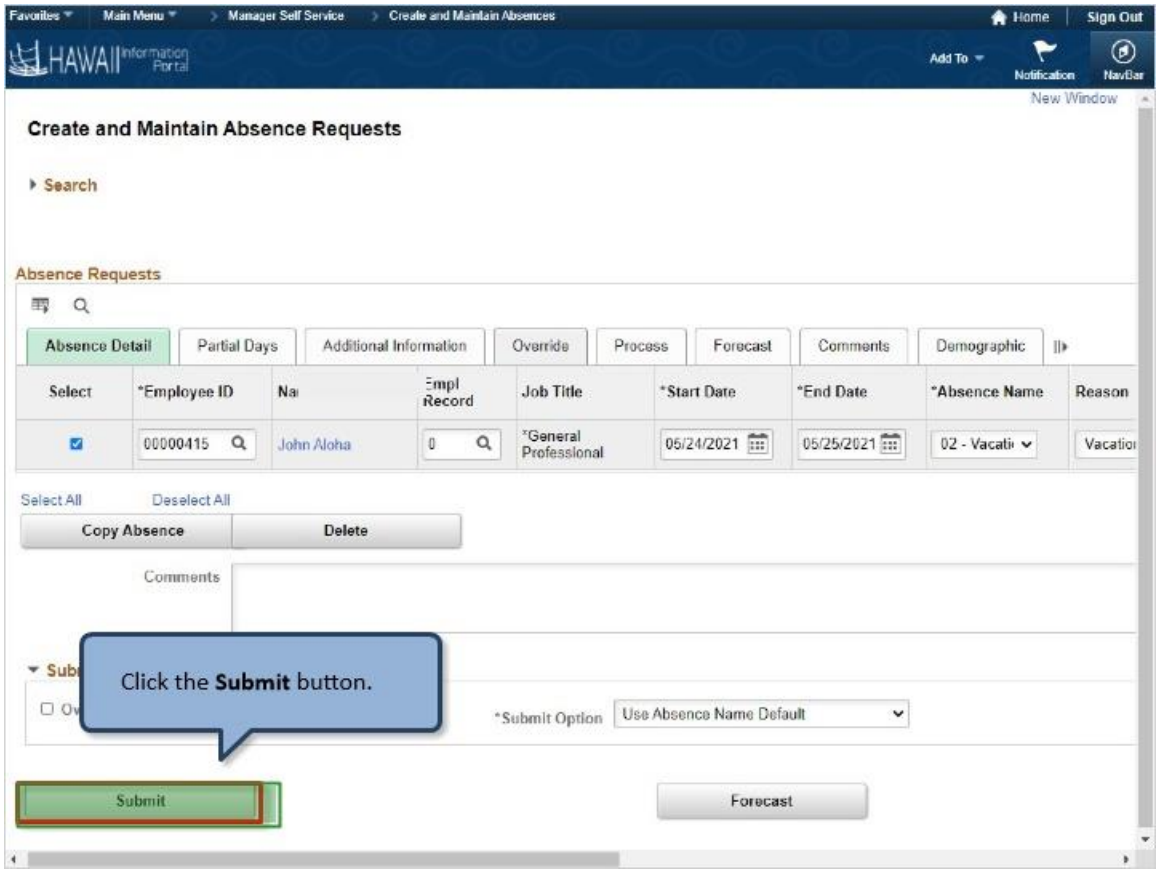


The **Use Absence Name Default** routes the absence request to the manager for approval.

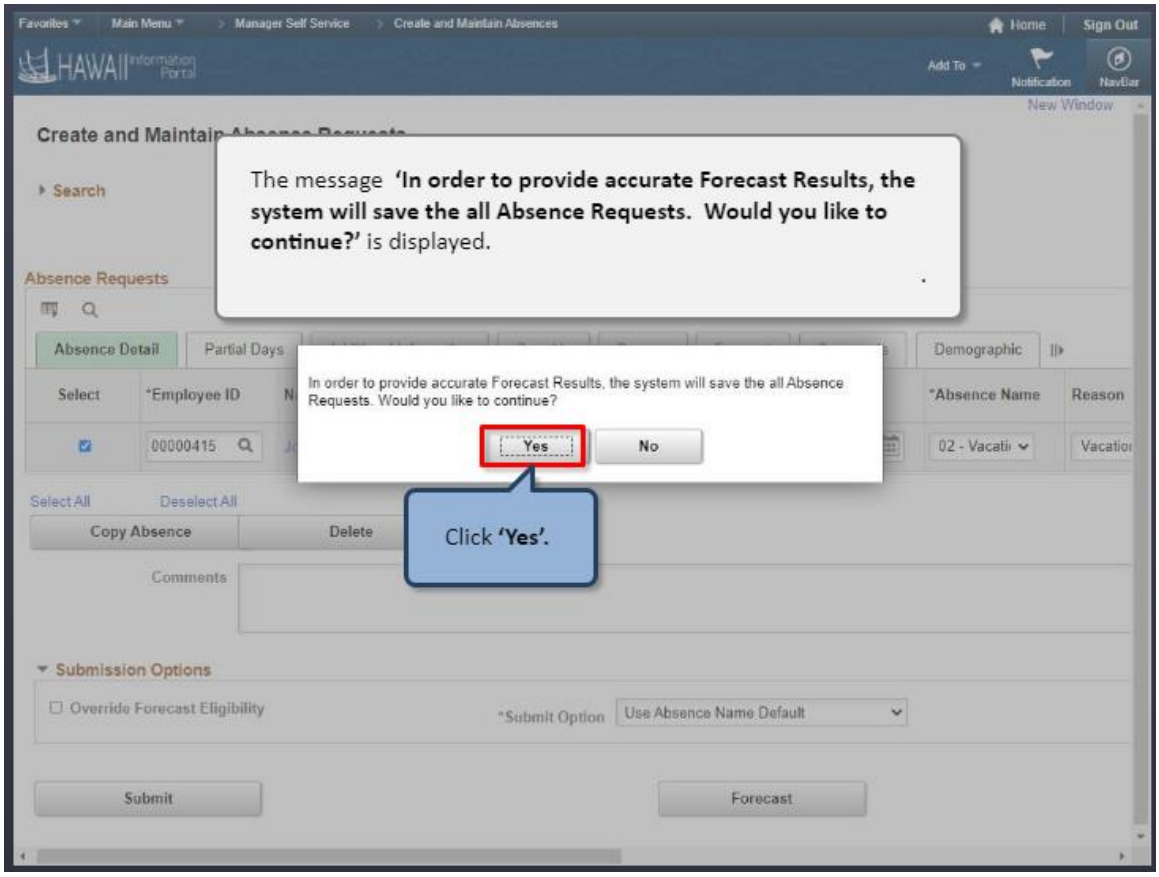
Click the **'Use Absence Name Default'** option.



Click the **'Select'** checkbox.

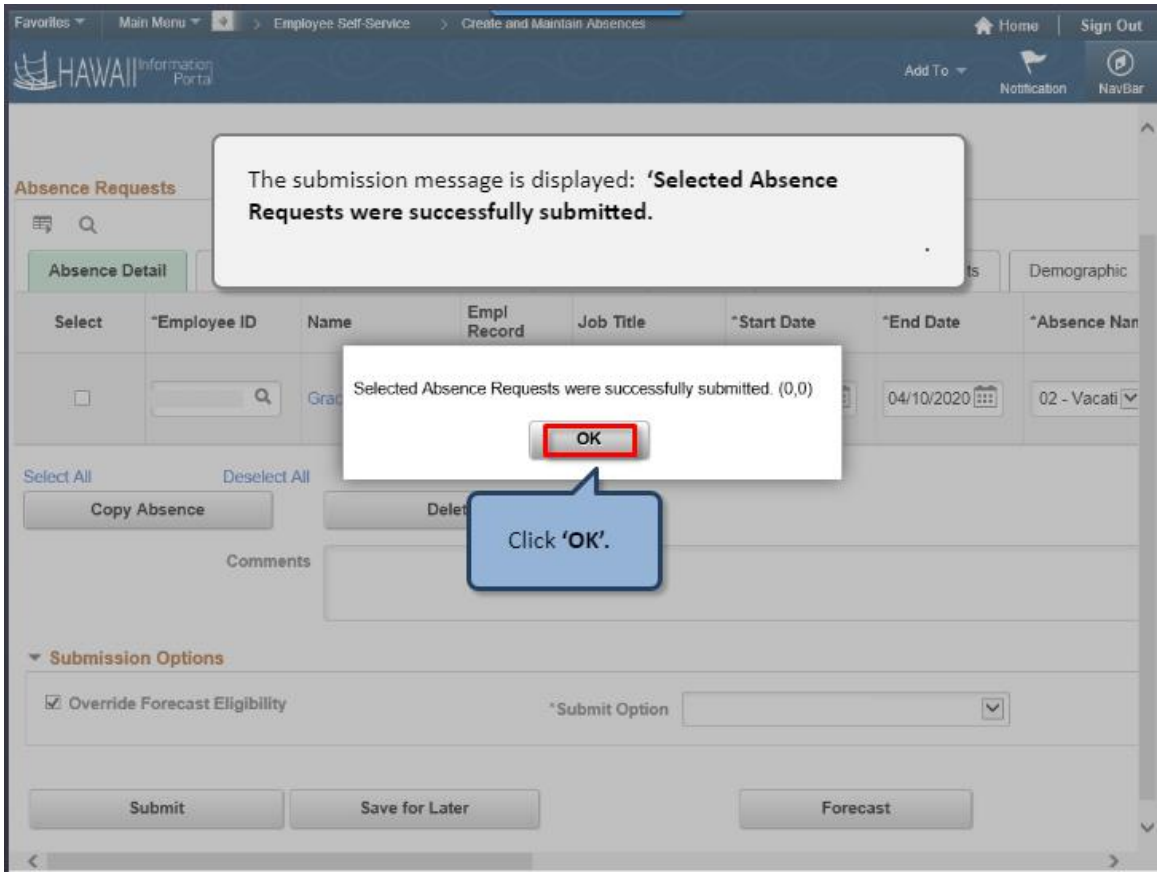


Click the **Submit** button.



The message '**In order to provide accurate Forecast Results, the system will save the all Absence Requests. Would you like to continue?'** is displayed.

Click **'Yes'**



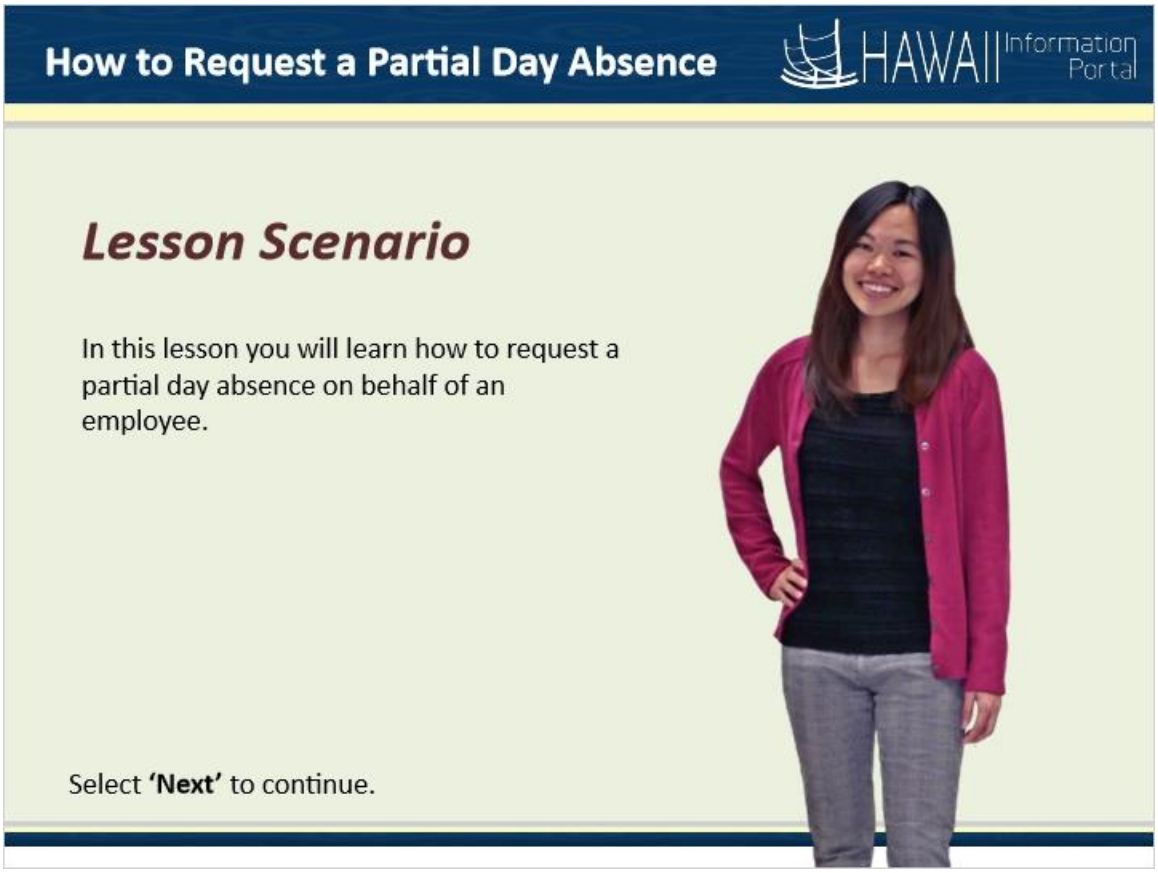
The submission message is displayed: **'Selected Absence Requests were successfully submitted.**

Click **'OK'.**

Congratulations!

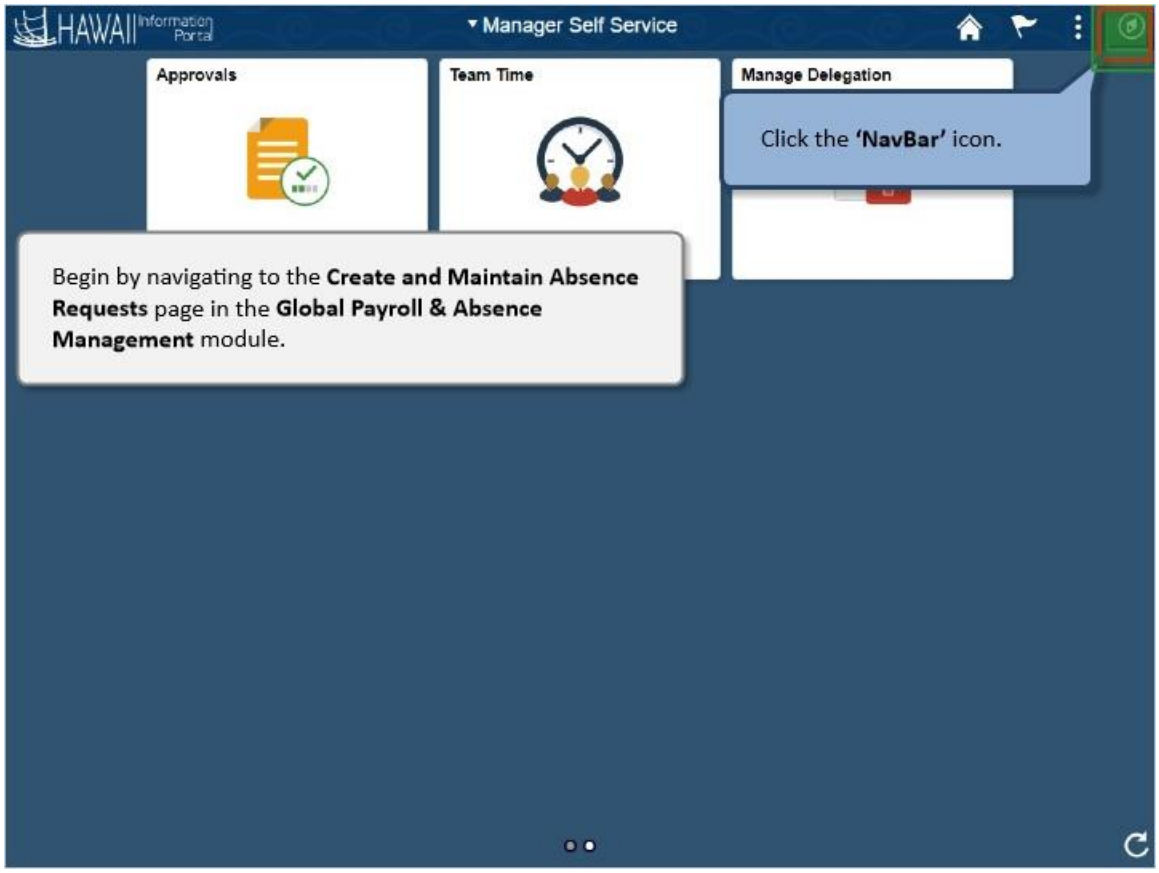
You've successfully completed this lesson.

HOW TO REQUEST A PARTIAL DAY ABSENCE



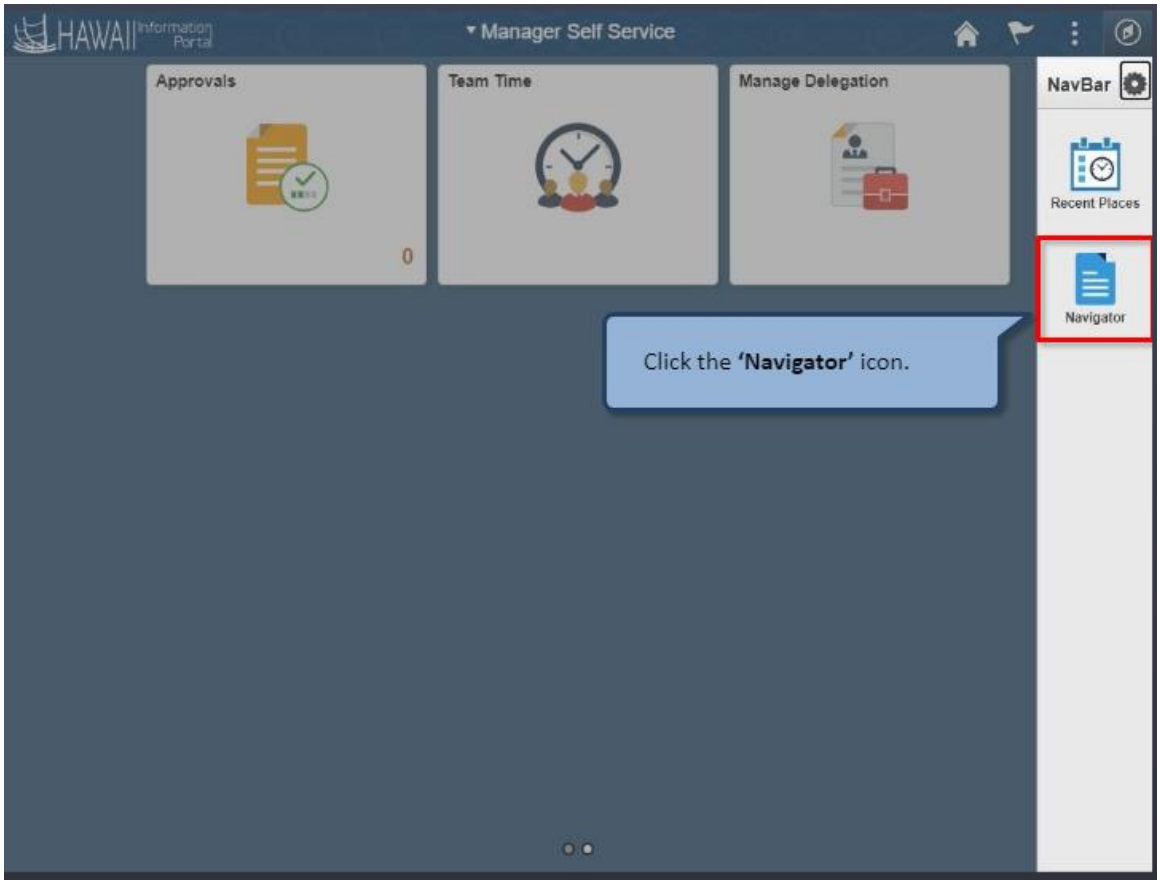
Lesson Scenario

In this lesson you will learn how to request a partial day absence on behalf of an employee.

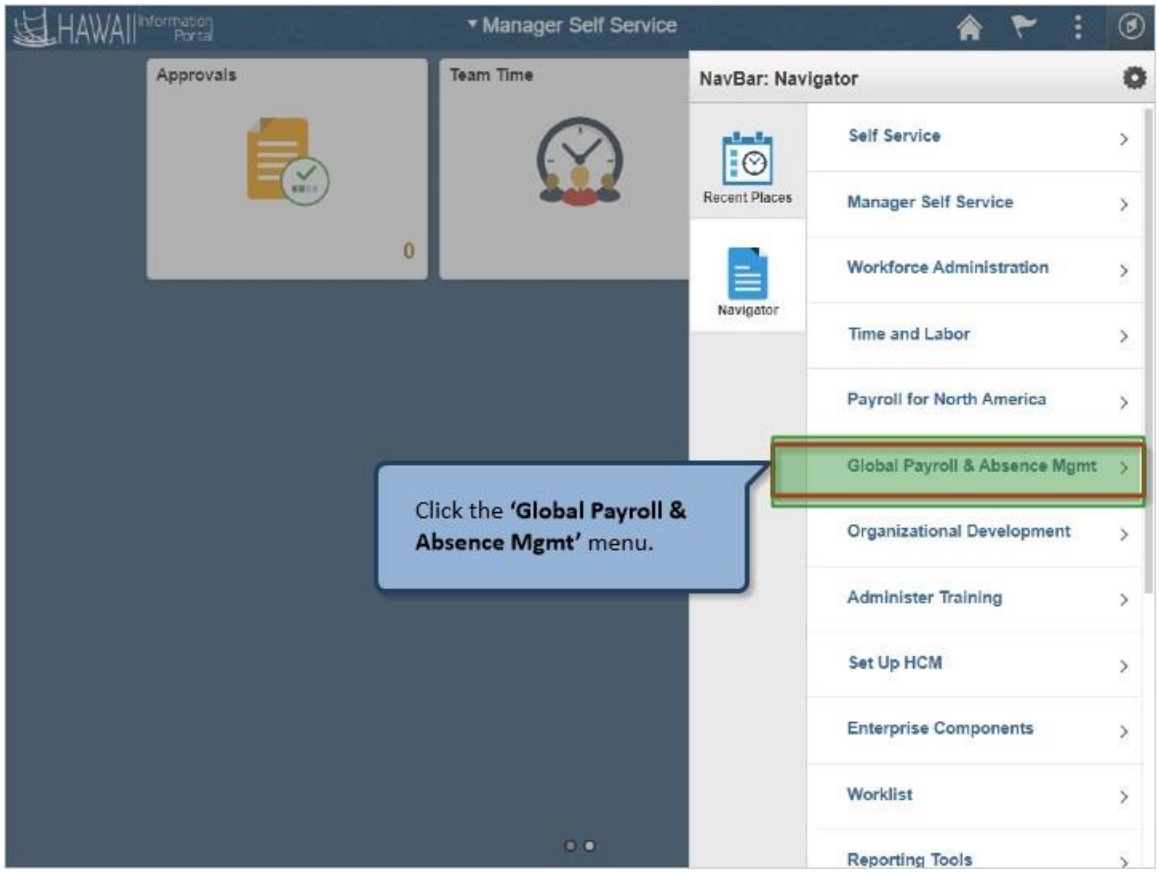


Begin by navigating to the **Create and Maintain Absence Requests** page in the **Global Payroll & Absence Management** module.

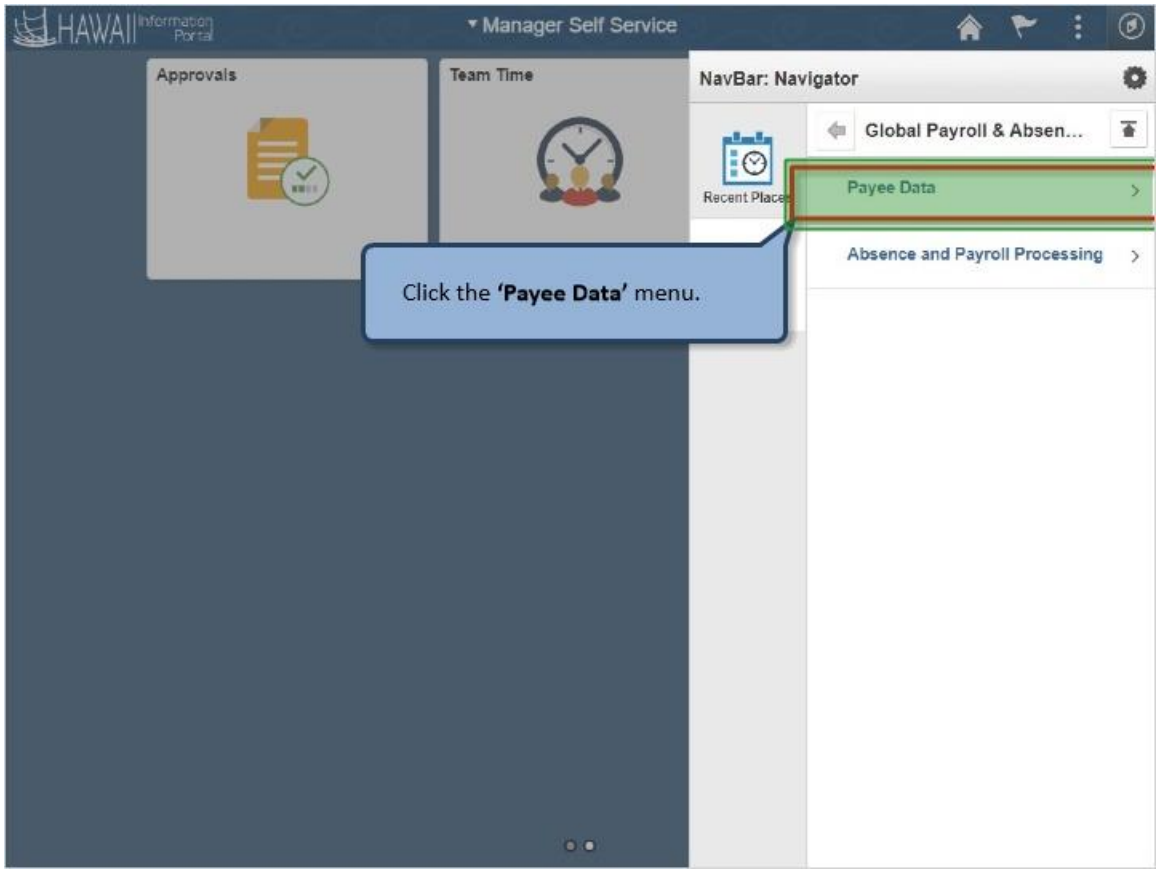
Click the **'NavBar'** icon.



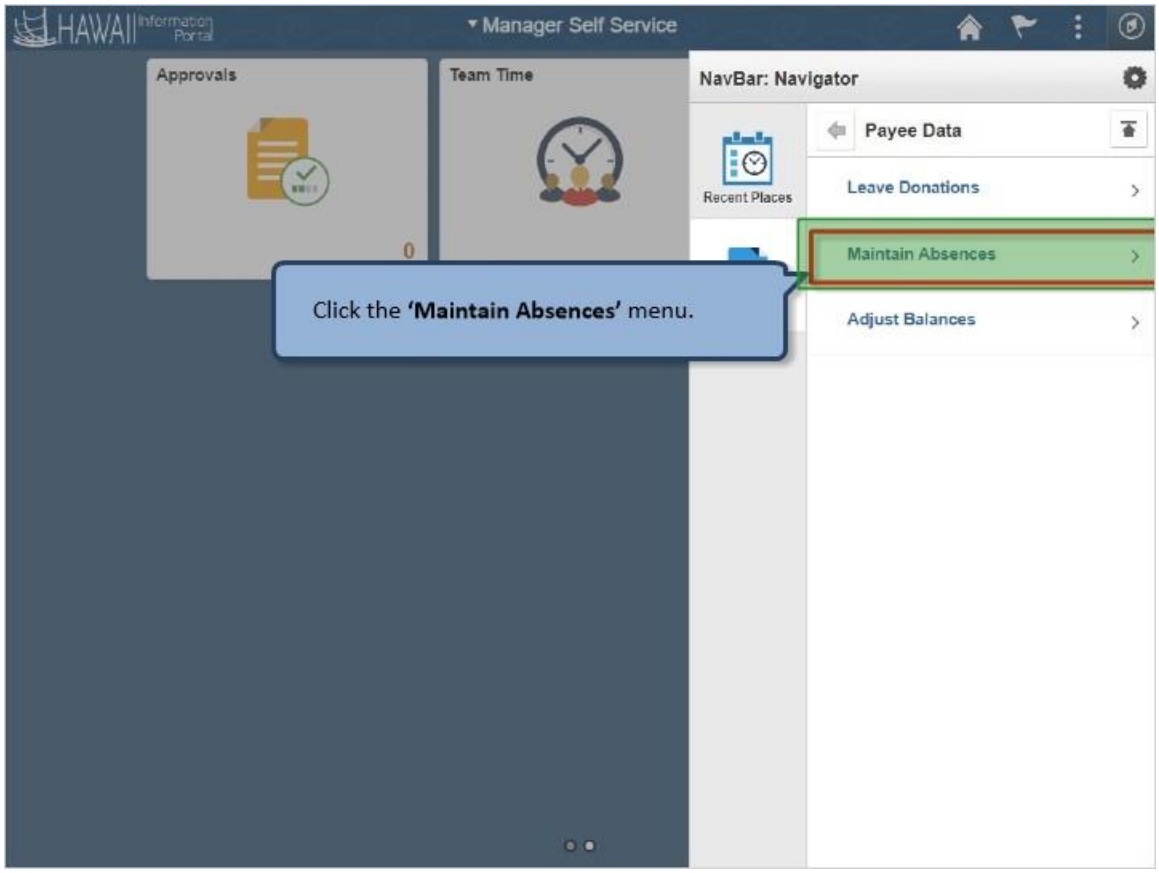
Click the **'Navigator'** icon.



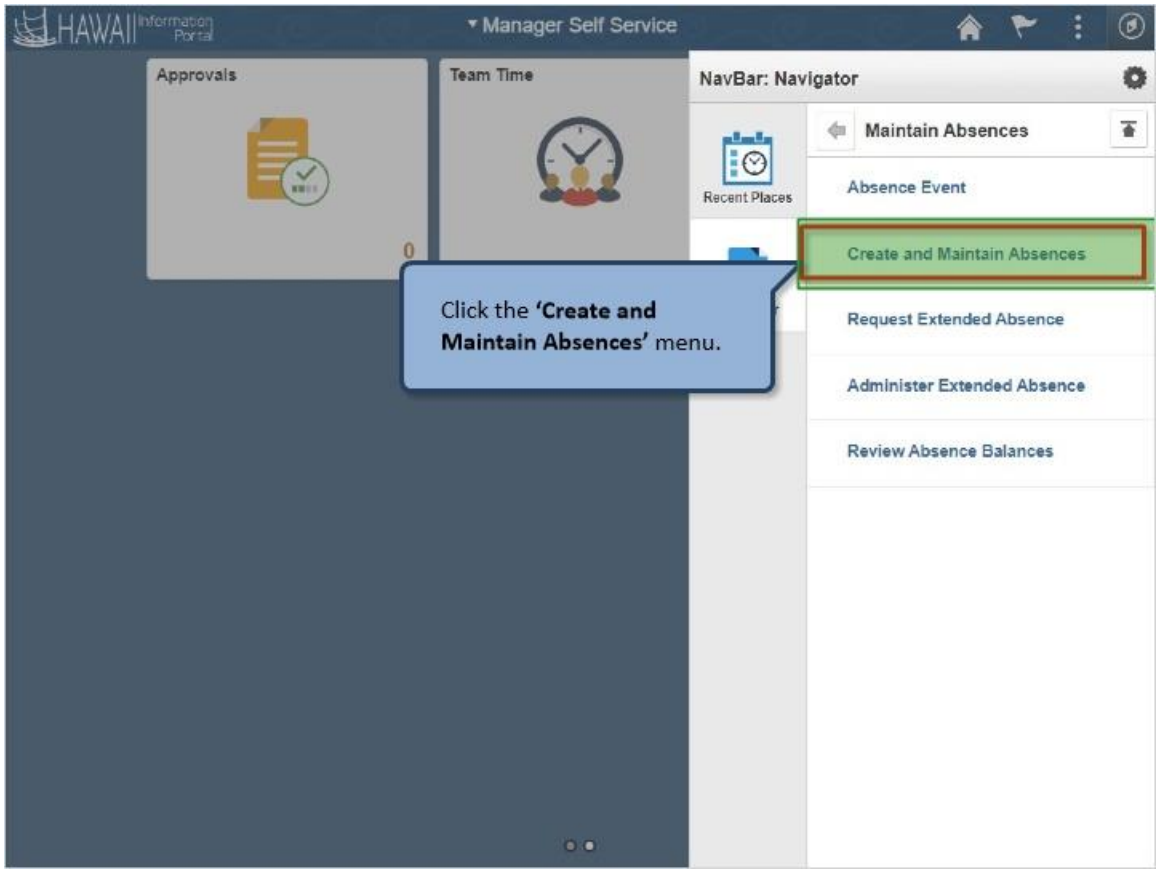
Click the **'Global Payroll & Absence Mgmt'** menu..



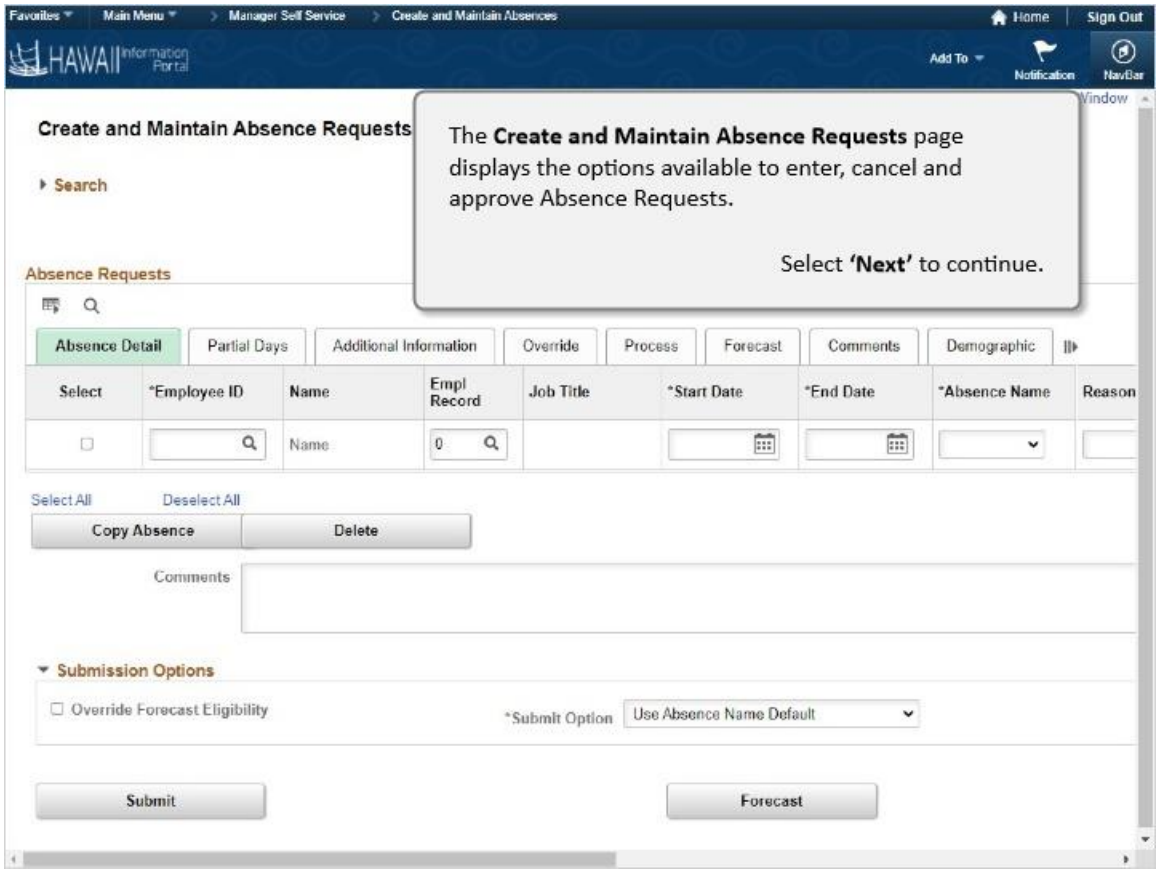
Click the **'Payee Data'** menu.



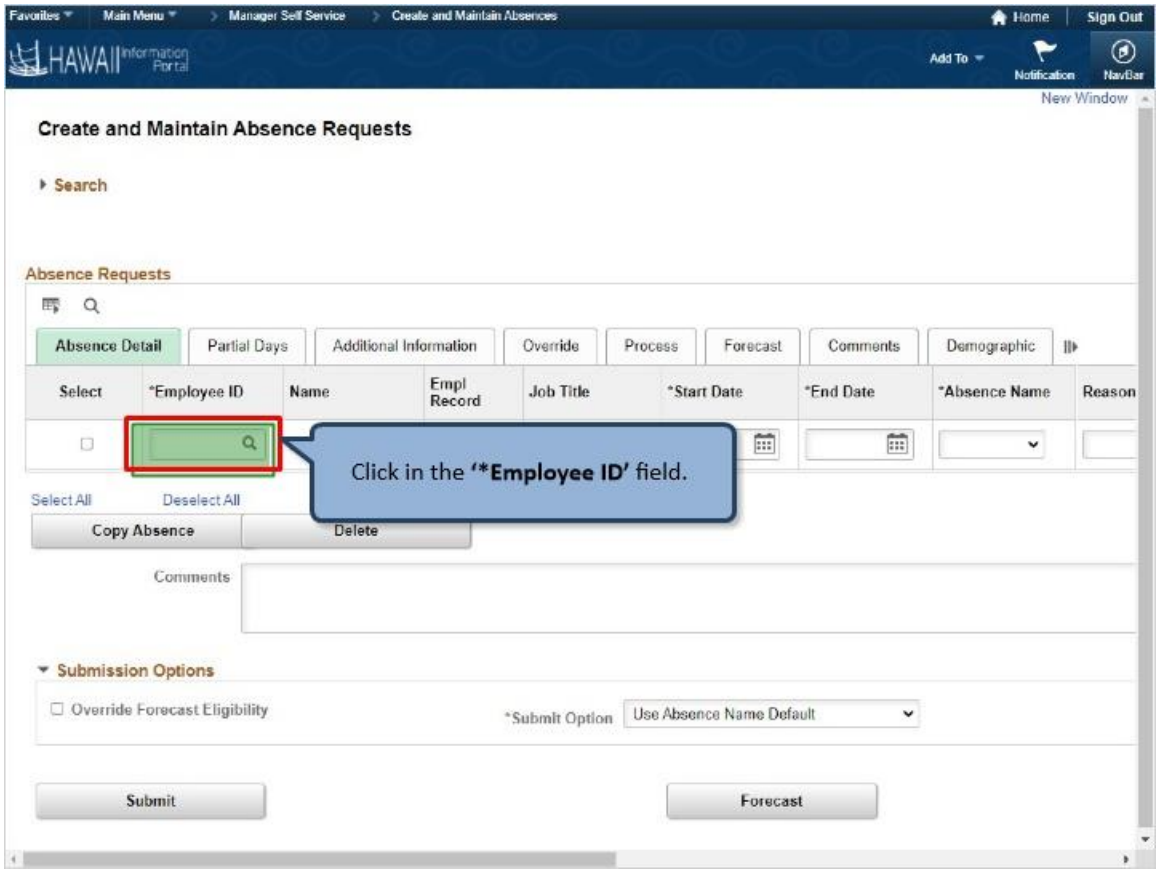
Click the **'Maintain Absences'** menu.



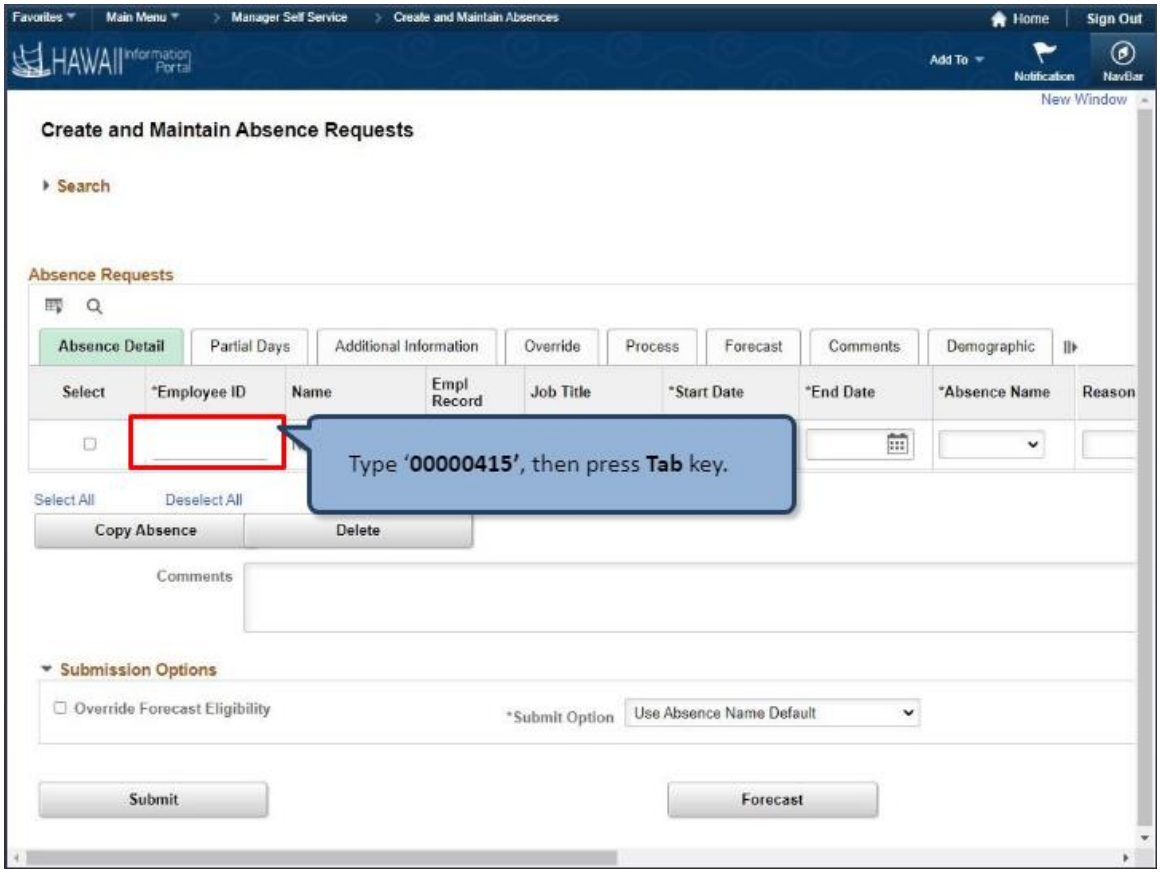
Click the **'Create and Maintain Absences**' menu.



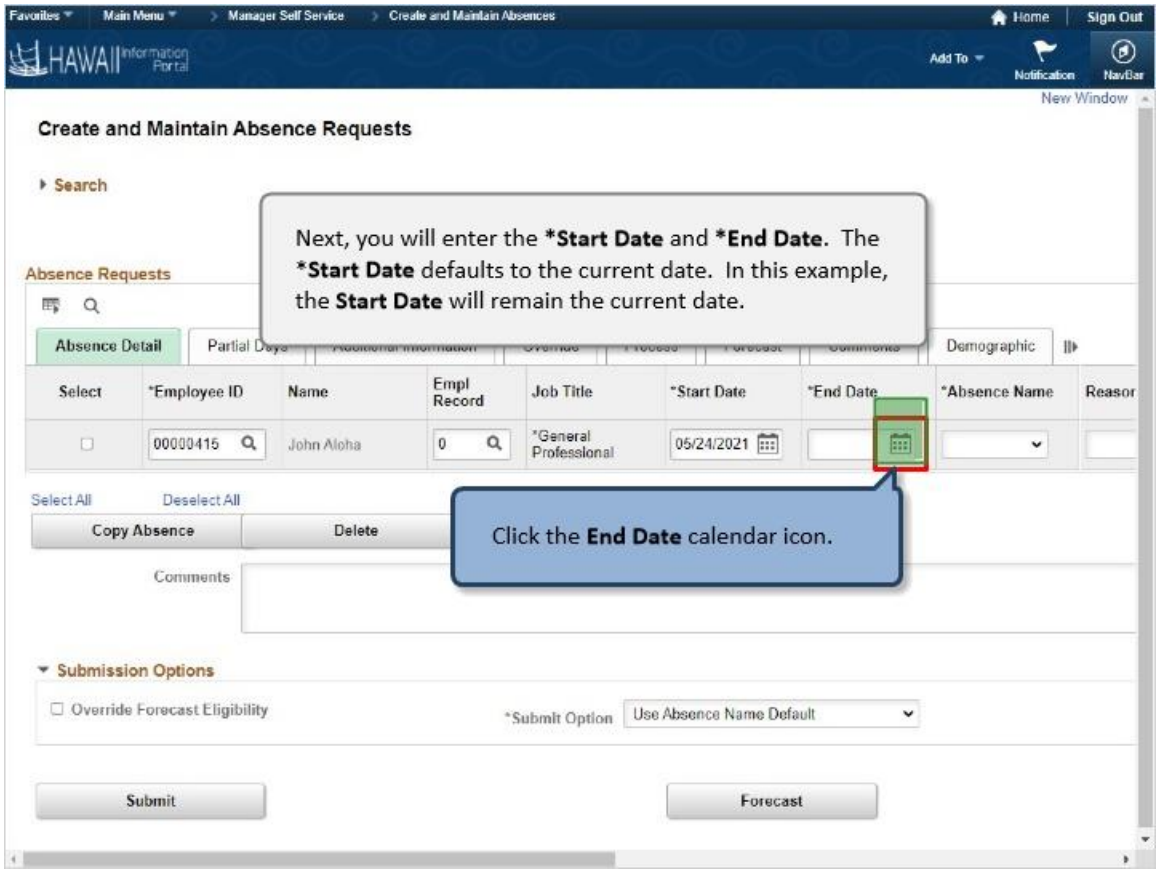
The **Create and Maintain Absence Requests** page displays the options available to enter, cancel and approve Absence Requests.



Click in the **'*Employee ID'** field

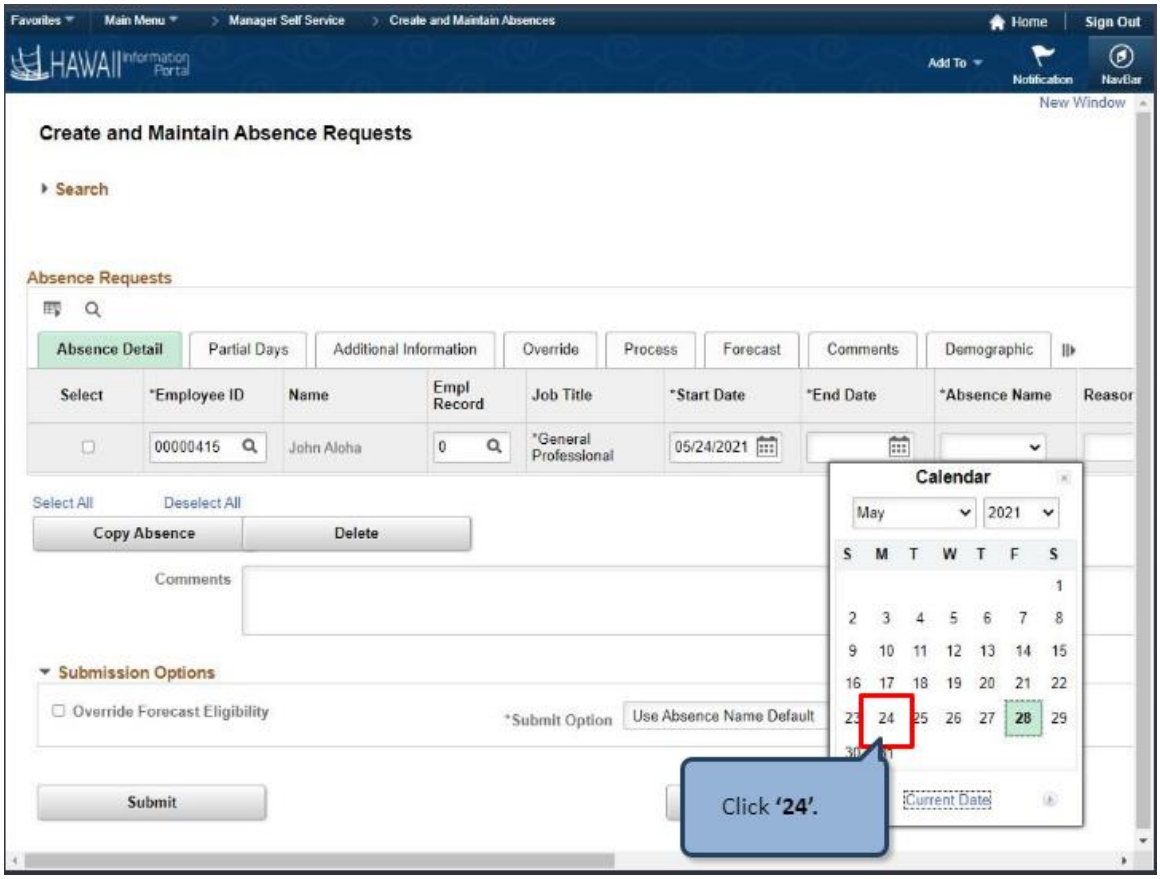


Type **'00000415**', then press Tab key.

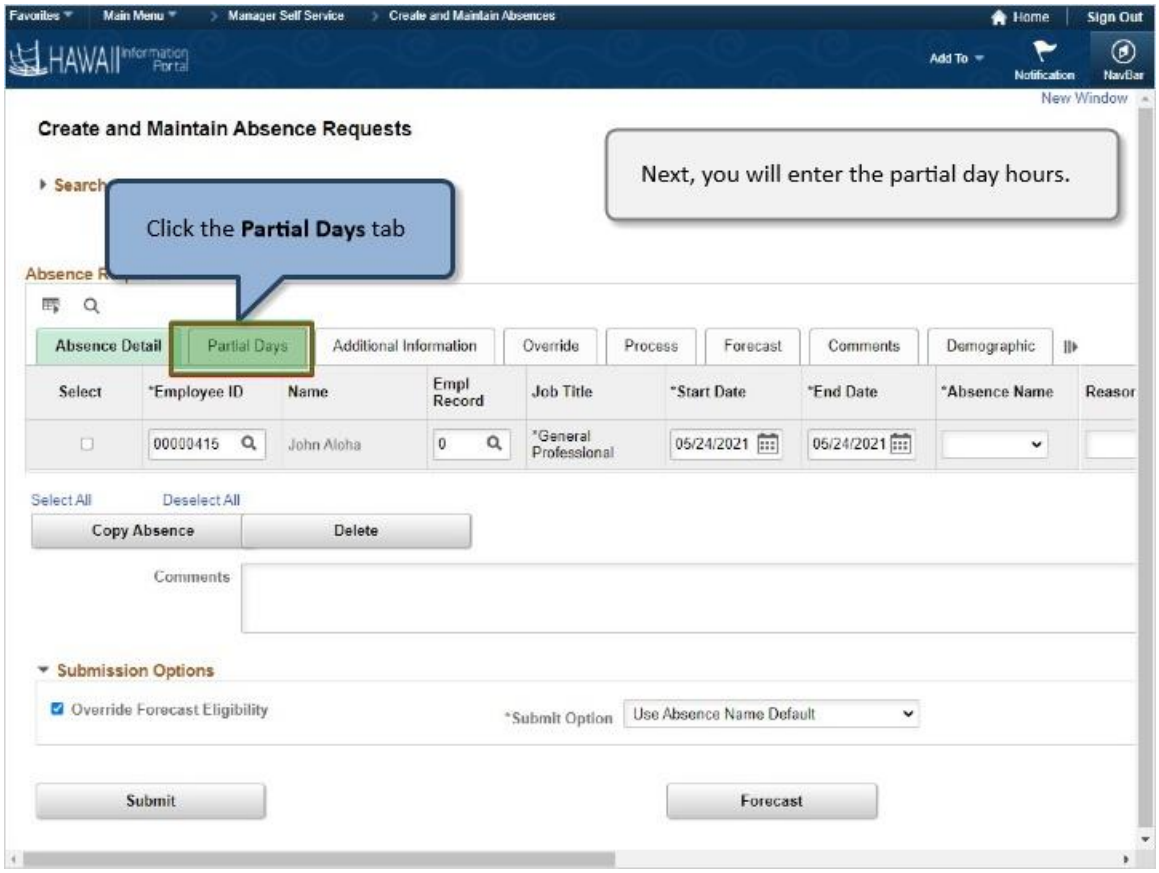


Next, you will enter the ***Start Date** and ***End Date**. The ***Start Date** defaults to the current date. In this example, the Start Date will remain the current date.

Click the **End Date** calendar icon.

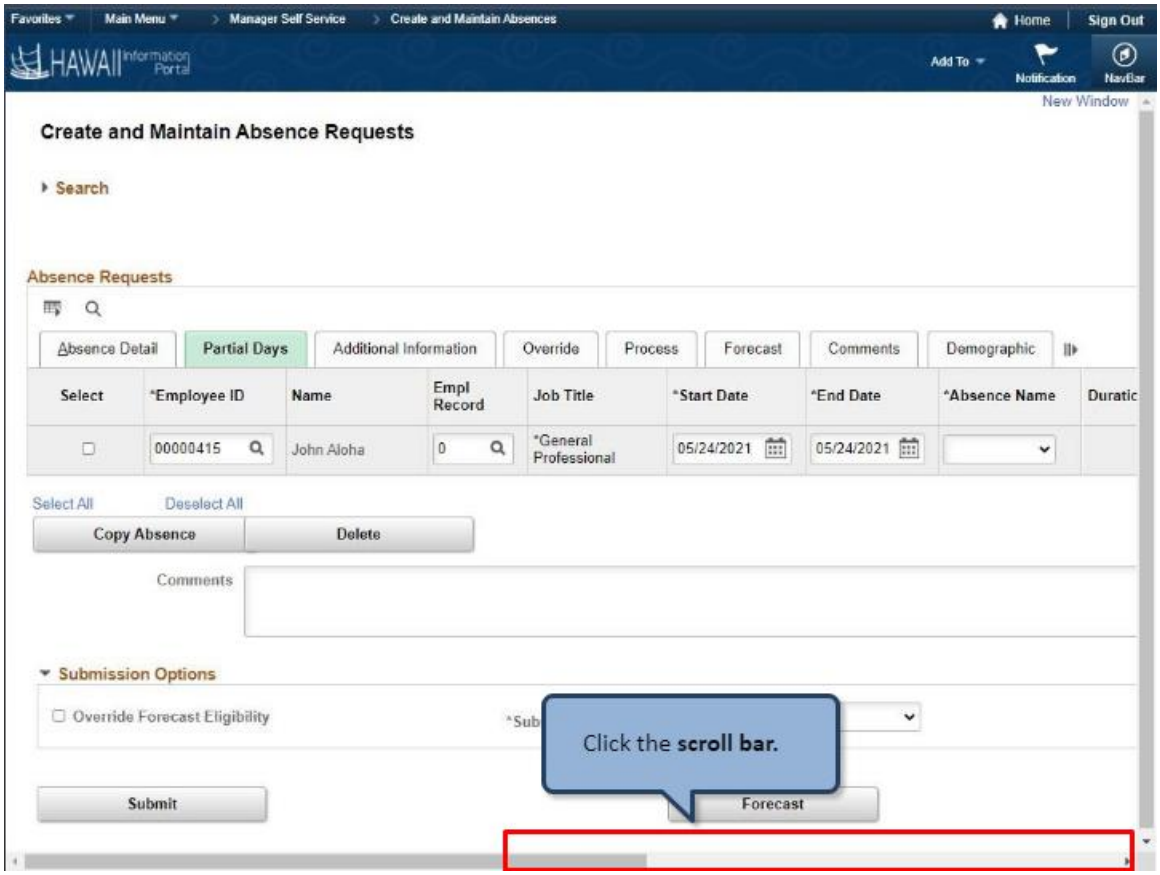

Favorites
Main Menu
Manager Self Service
Create and Maintain Absences
Home
Sign Out
Add To
Notification
NavBar
New Window
Create and Maintain Absence Requests
Search
Absence Requests
Absence Detail
Partial Days
Additional Information
Override
Process
Forecast
Comments
Demographic
Select
*Employee ID
Name
Empl Record
Job Title
*Start Date
*End Date
*Absence Name
00000415
John Aloha
0
*General Professional
05/24/2021
Select All
Deselect All
Copy Absence
Delete
Comments
Submission Options
Override Forecast Eligibility
*Submit Option
Use Absence Name Default
Submit
Calendar
May
2021
S M T W T F S
Current Date
Click '24'.

Click **'24'.**

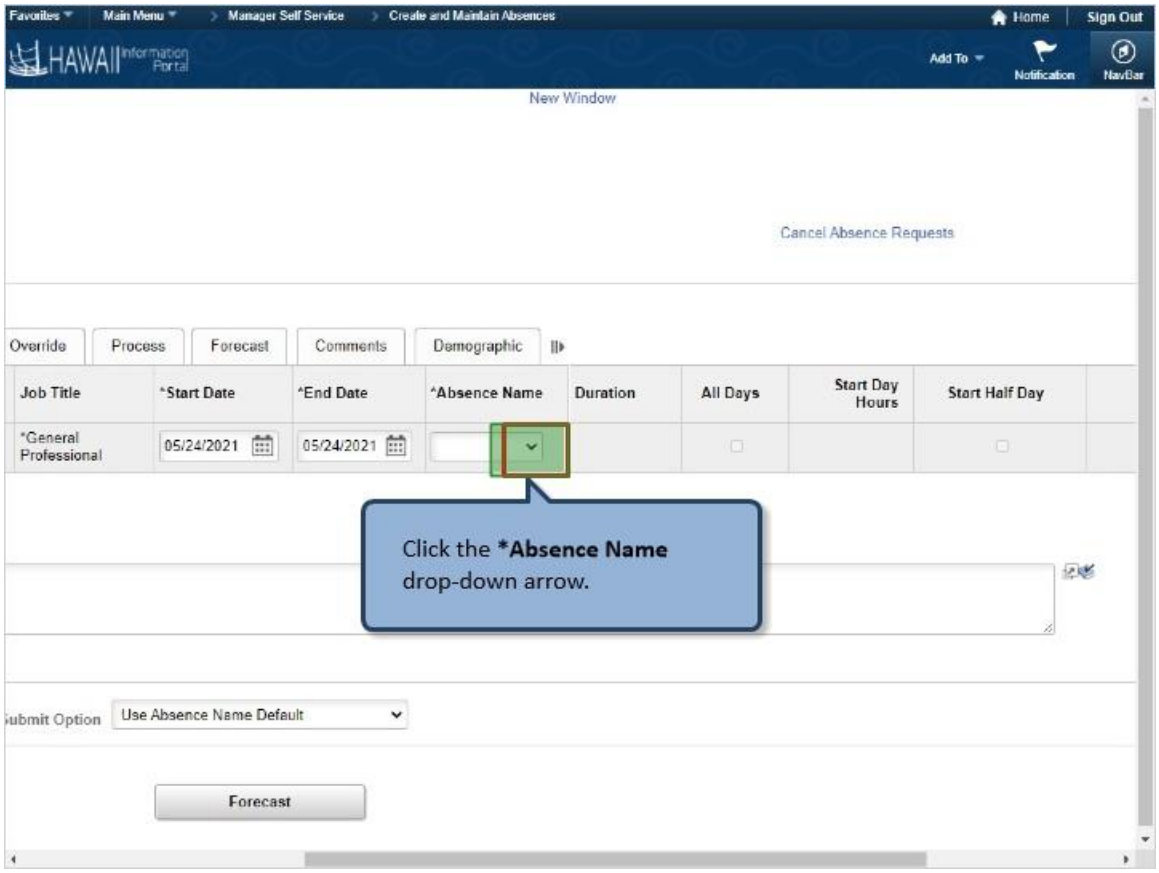


Next, you will enter the partial day hours.

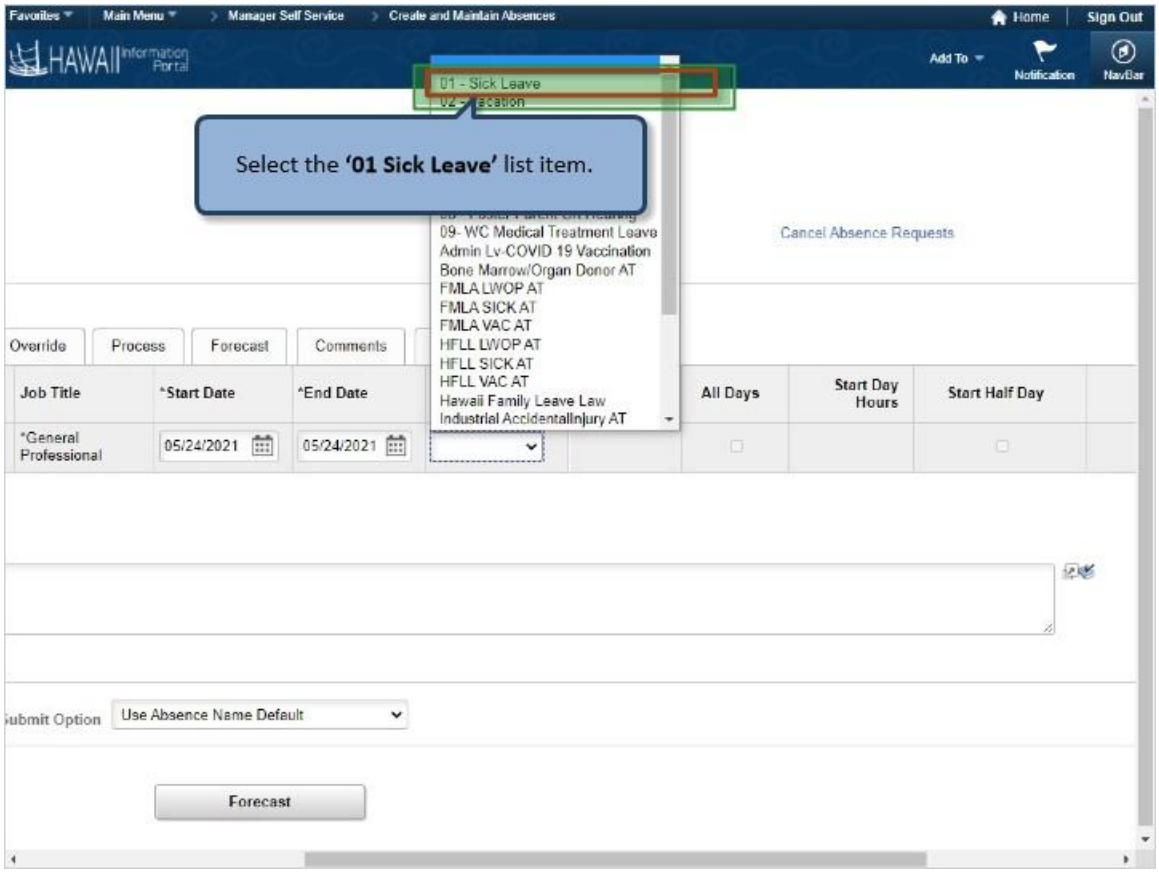
Click **Partial Days** tab



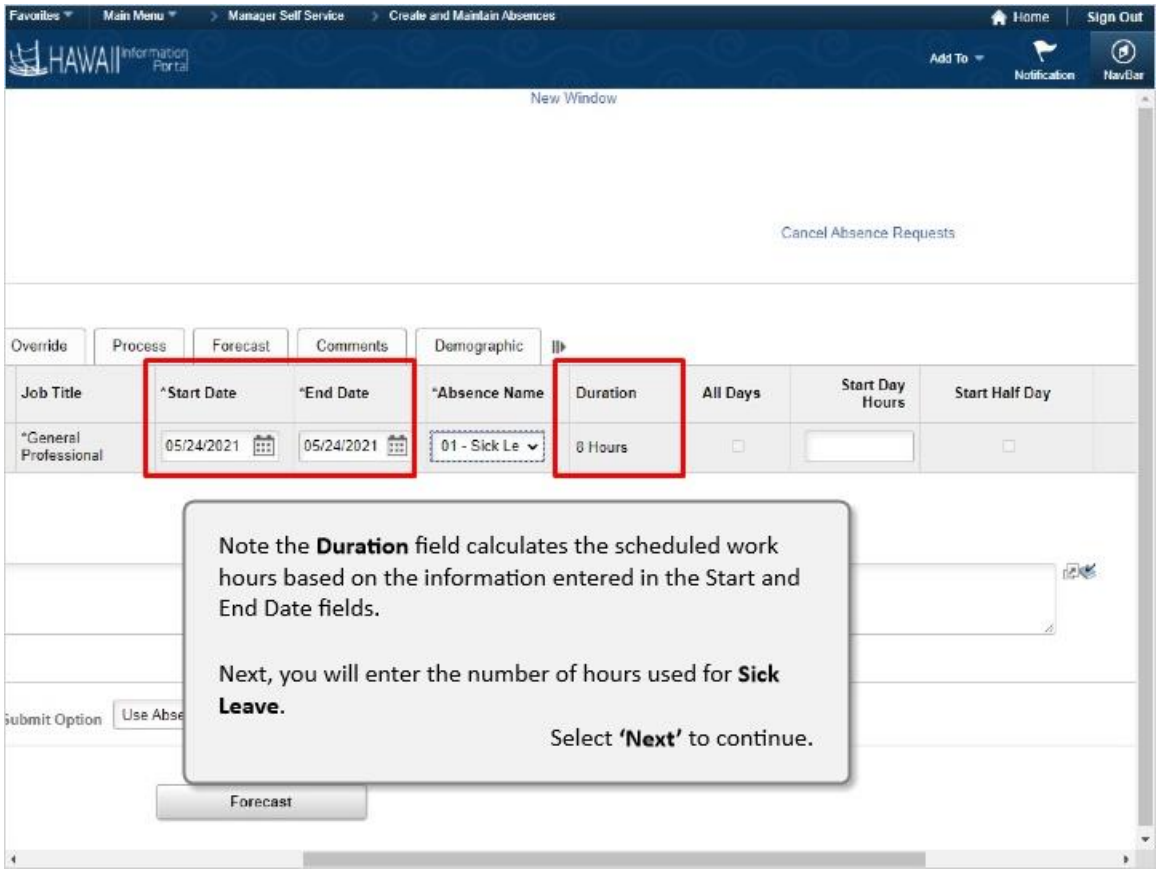
Click the **scroll bar**.



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

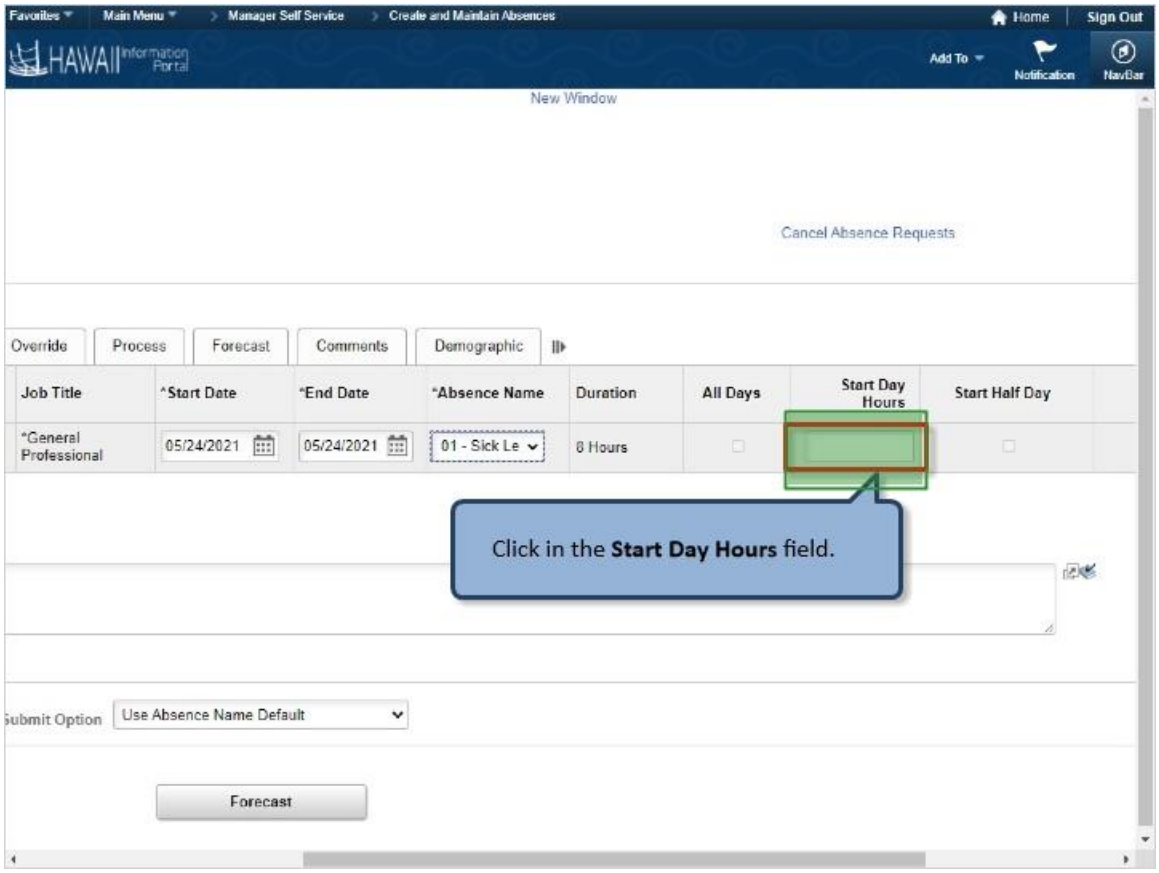


Select the **'01 Sick Leave'** list item.

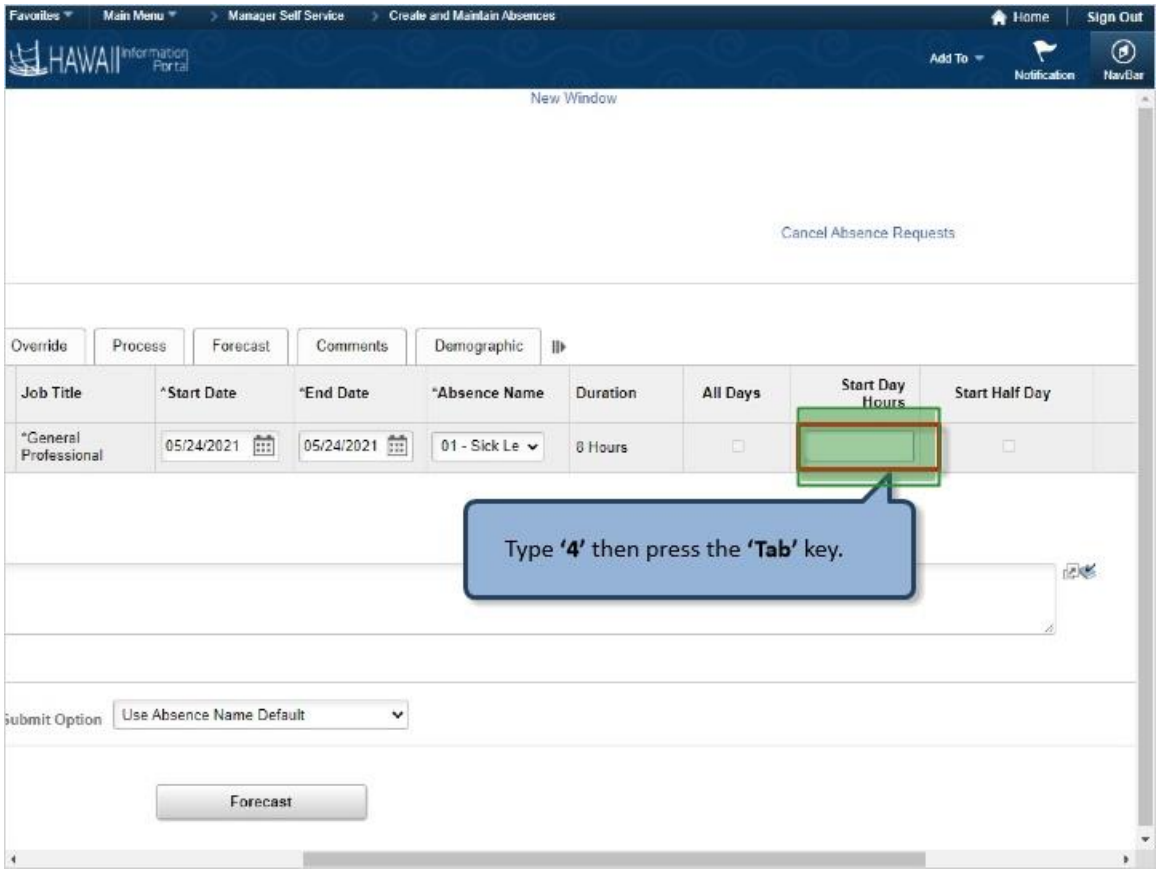


Note the **Duration** field calculates the scheduled work hours based on the information entered in the Start and End Date fields.

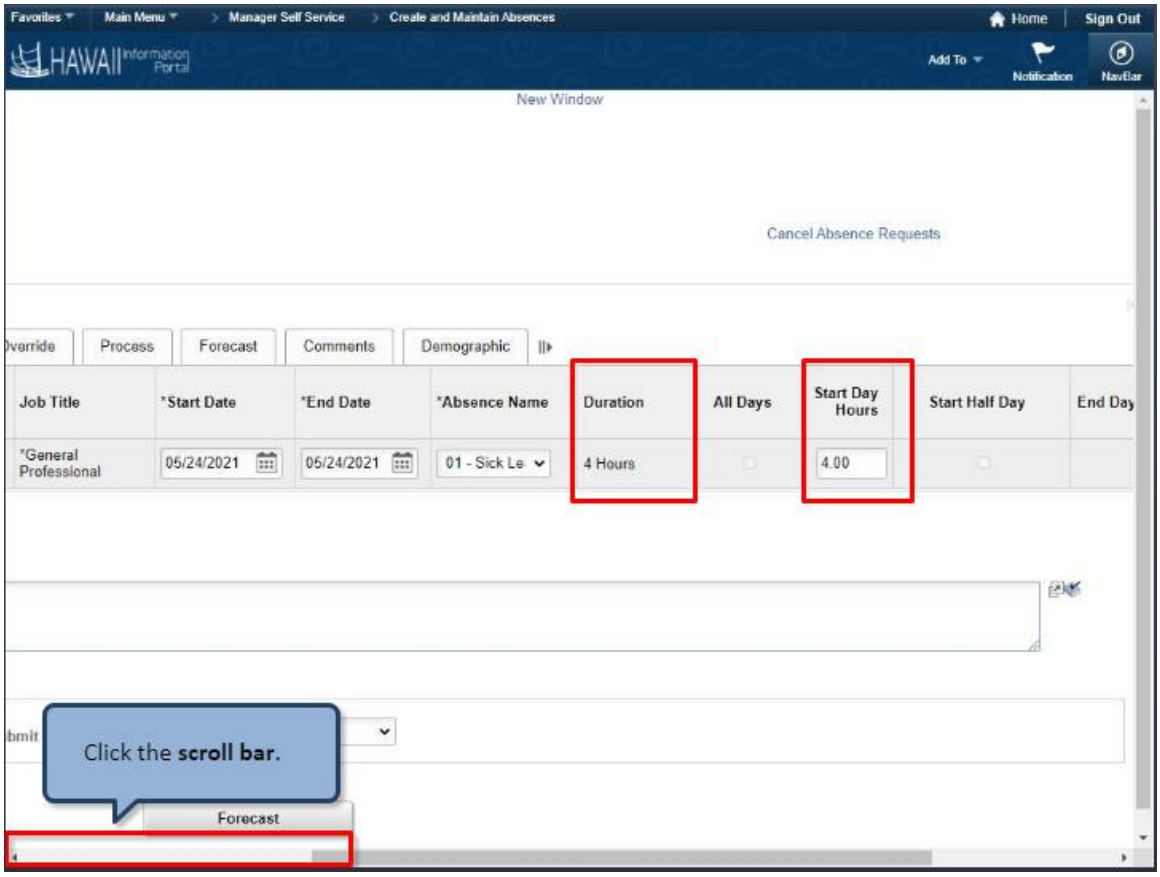
Next, you will enter the number of hours used for **Sick Leave**.



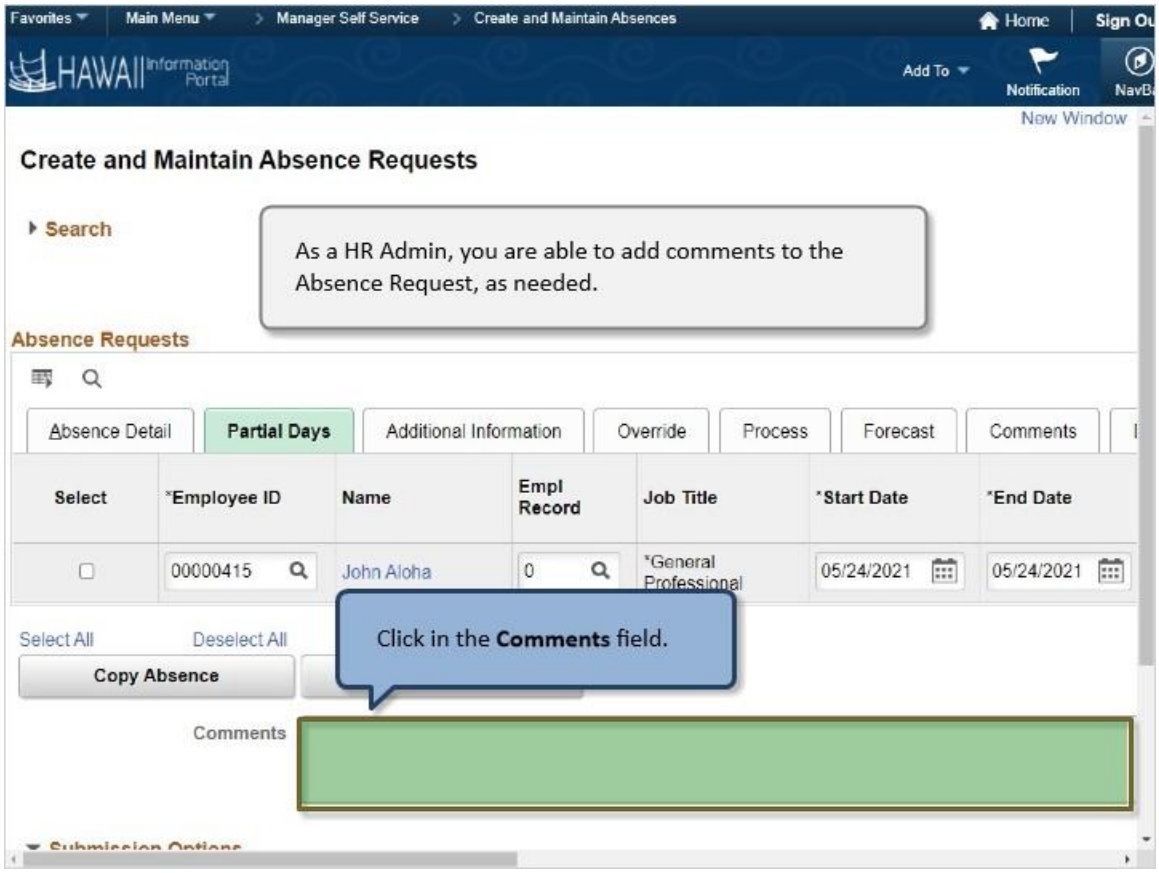
Click in the **Start Day Hours** field.



Type **'4'** then press the **'Tab'** key.

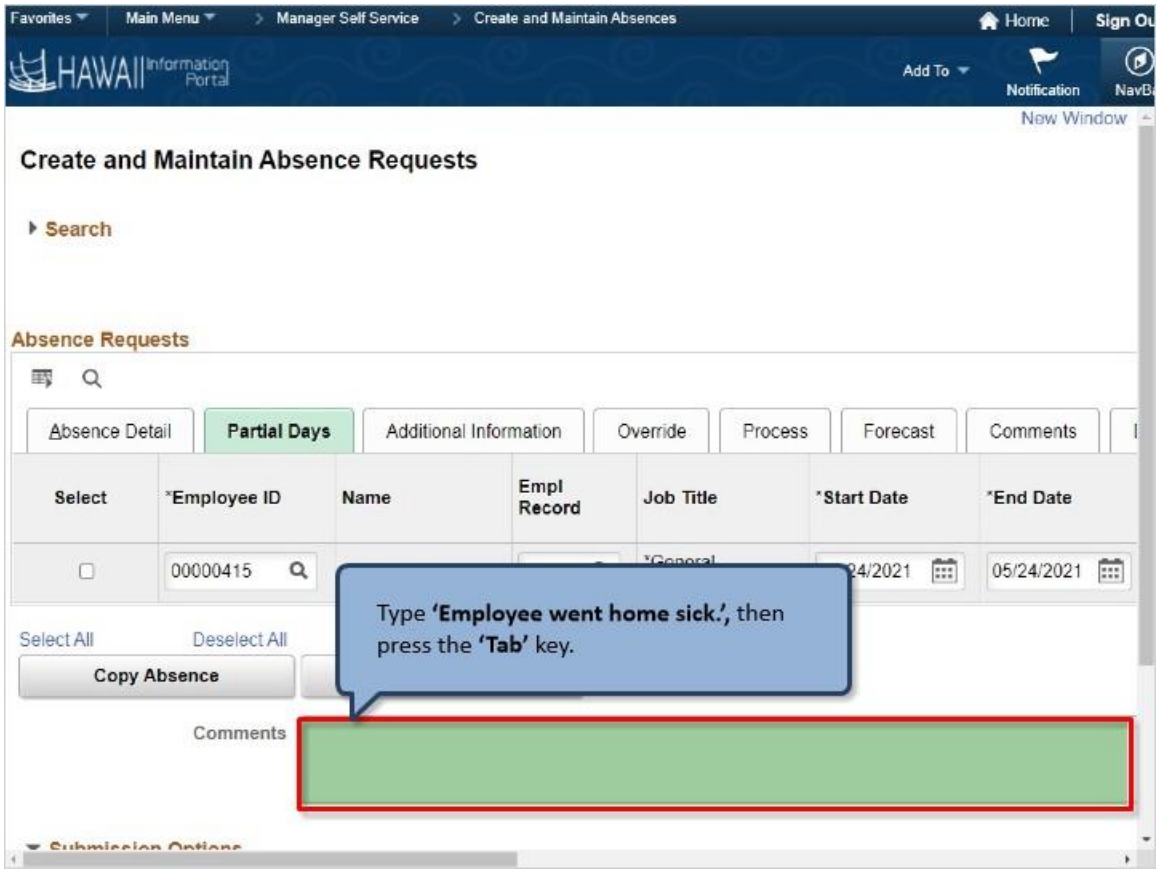


Click the **scroll bar**.

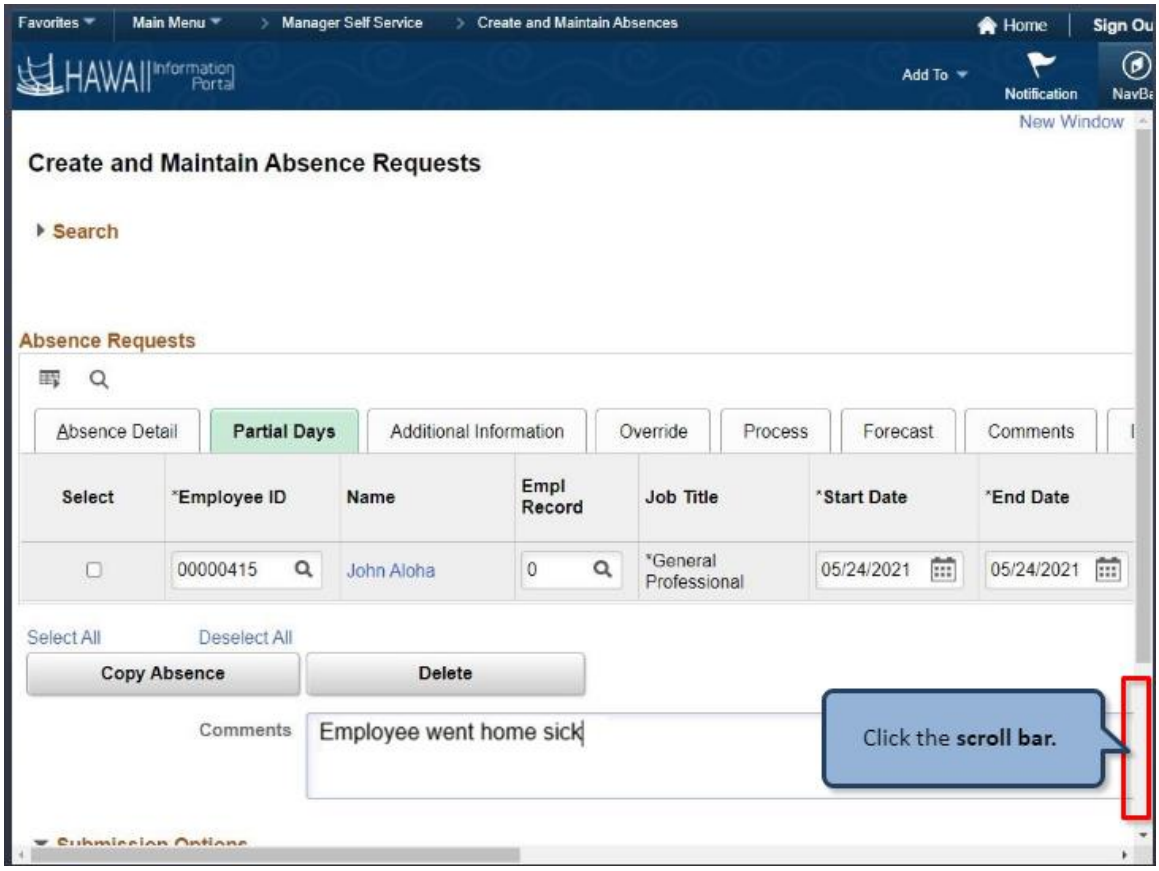


As a HR Admin, you are able to add comments to the Absence Request, as needed.

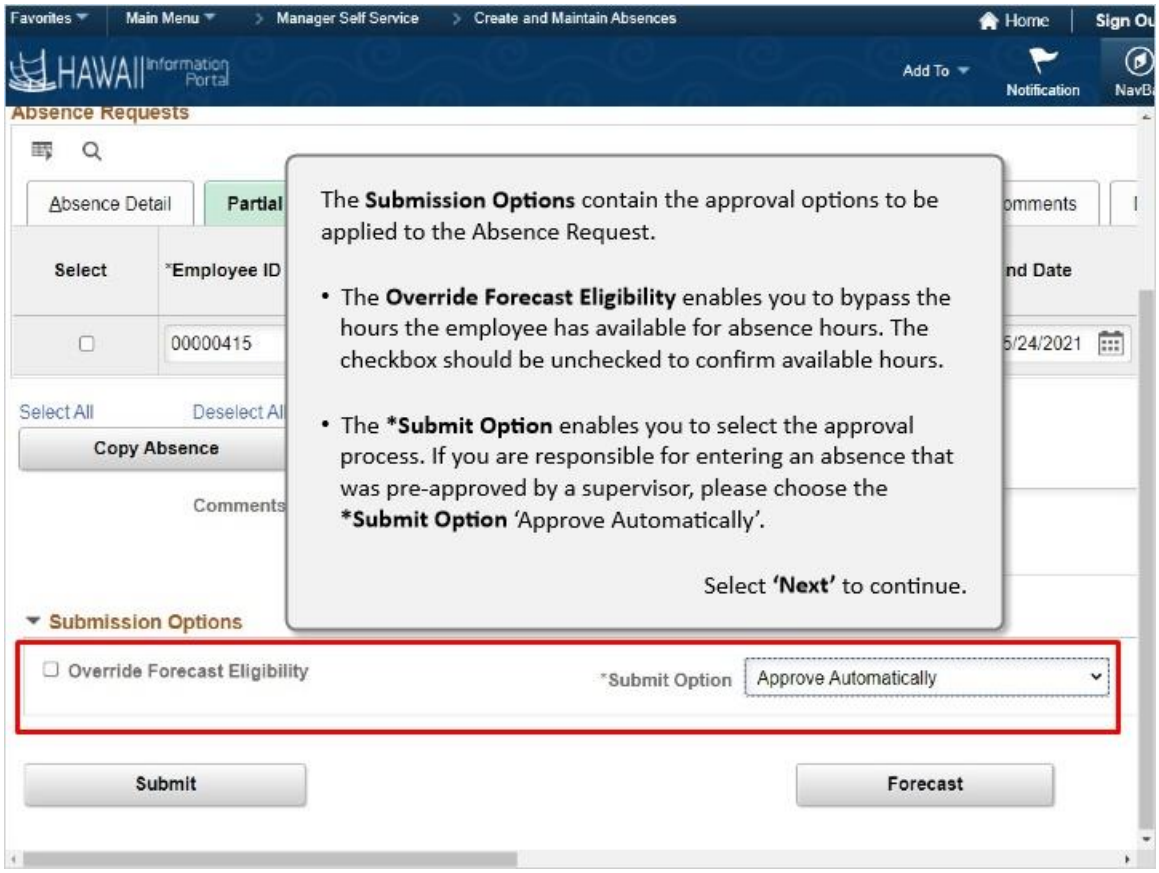
Click in the **Comments** field.



Type **'Employee went home sick.'**, then press the 'Tab' key.



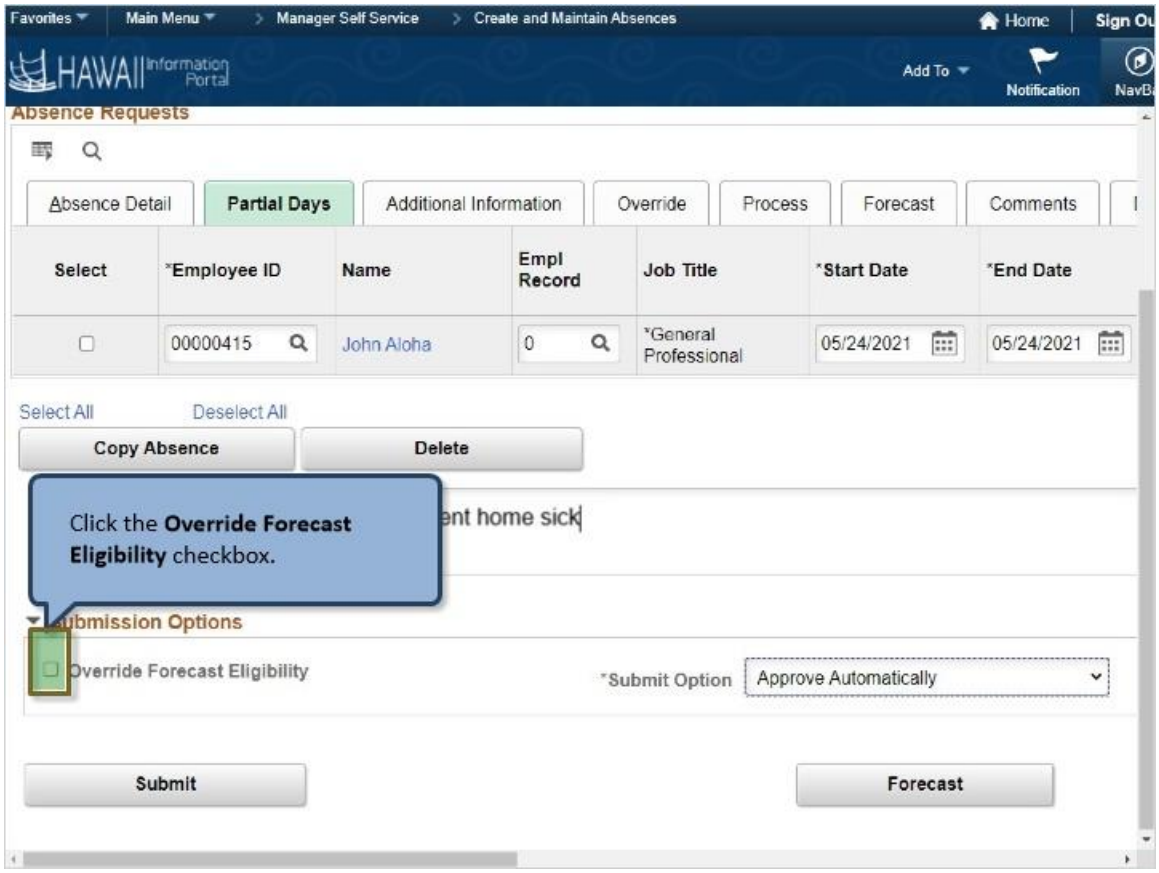
Click the **scroll bar**.



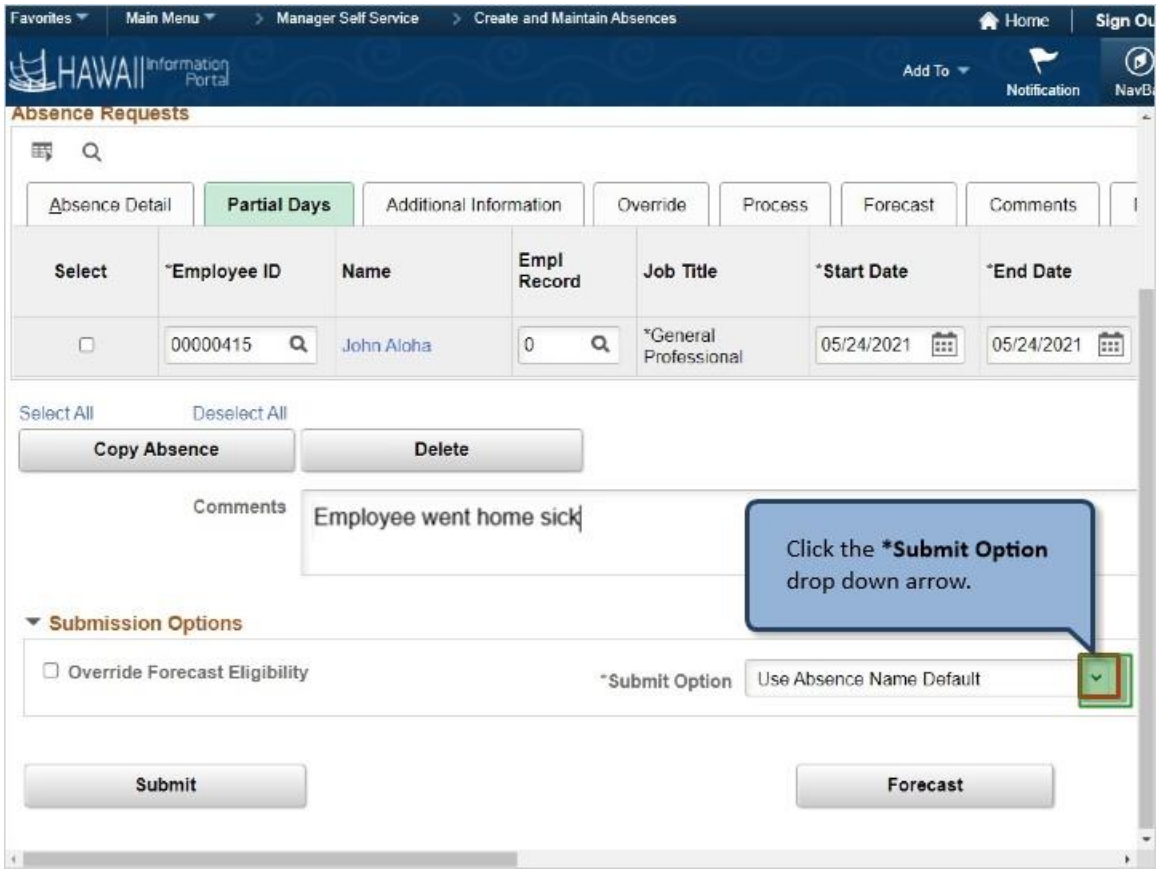
The **Submission Options** contain the approval options to be applied to the Absence Request.

- The **Override Forecast Eligibility** enables you to bypass the hours the employee has available for absence hours. The checkbox should be unchecked to confirm available hours.
- The ***Submit Option** enables you to select the approval process. If you are responsible for entering an absence that was pre-approved by a supervisor, please choose the ***Submit Option** 'Approve Automatically'

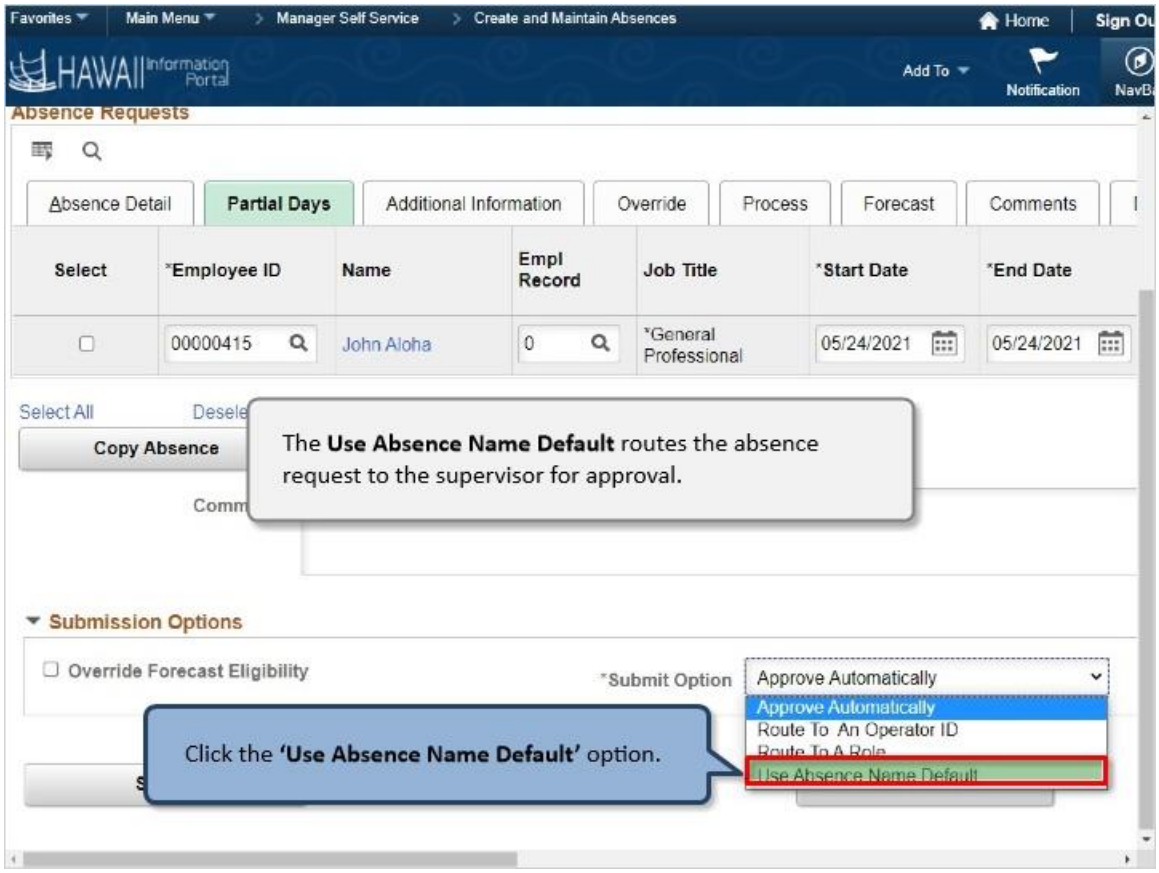
.



Click the **Override Forecast Eligibility** checkbox.

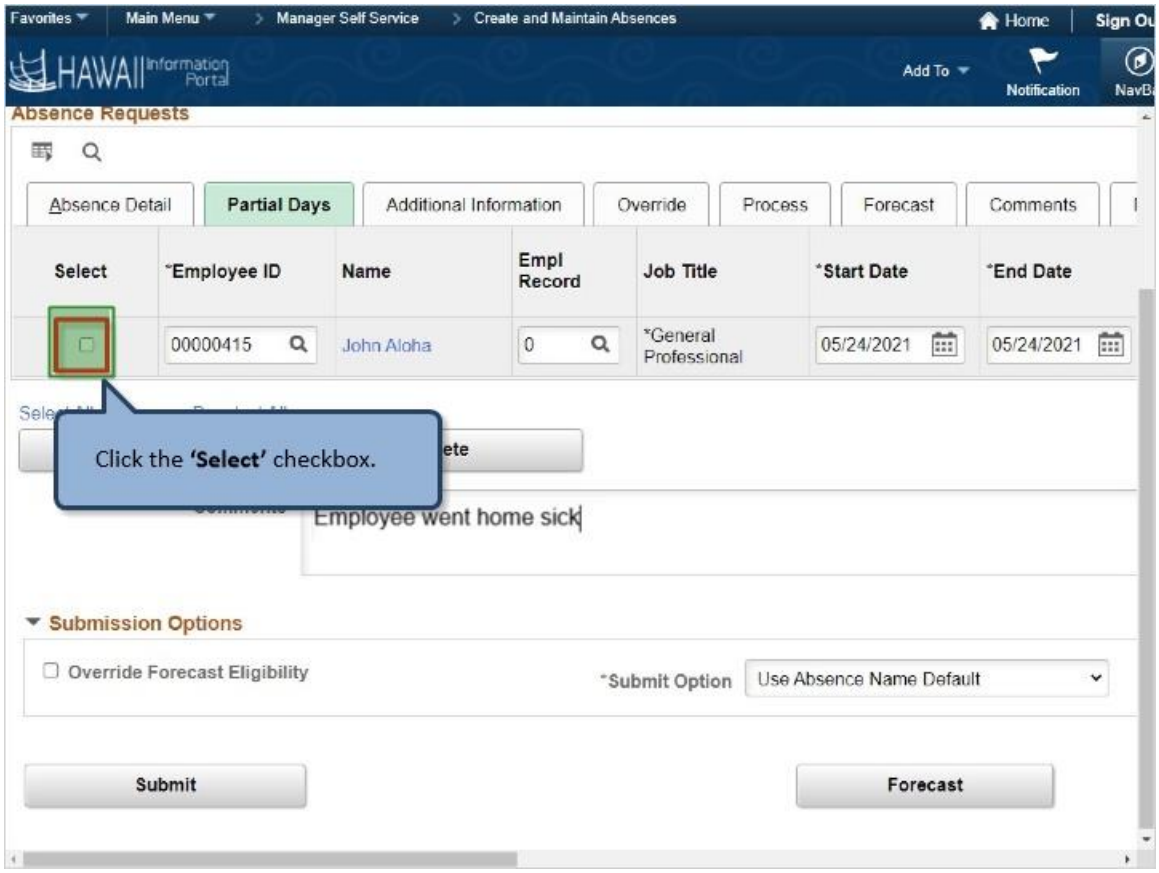


Click the ***Submit Option** drop down arrow.

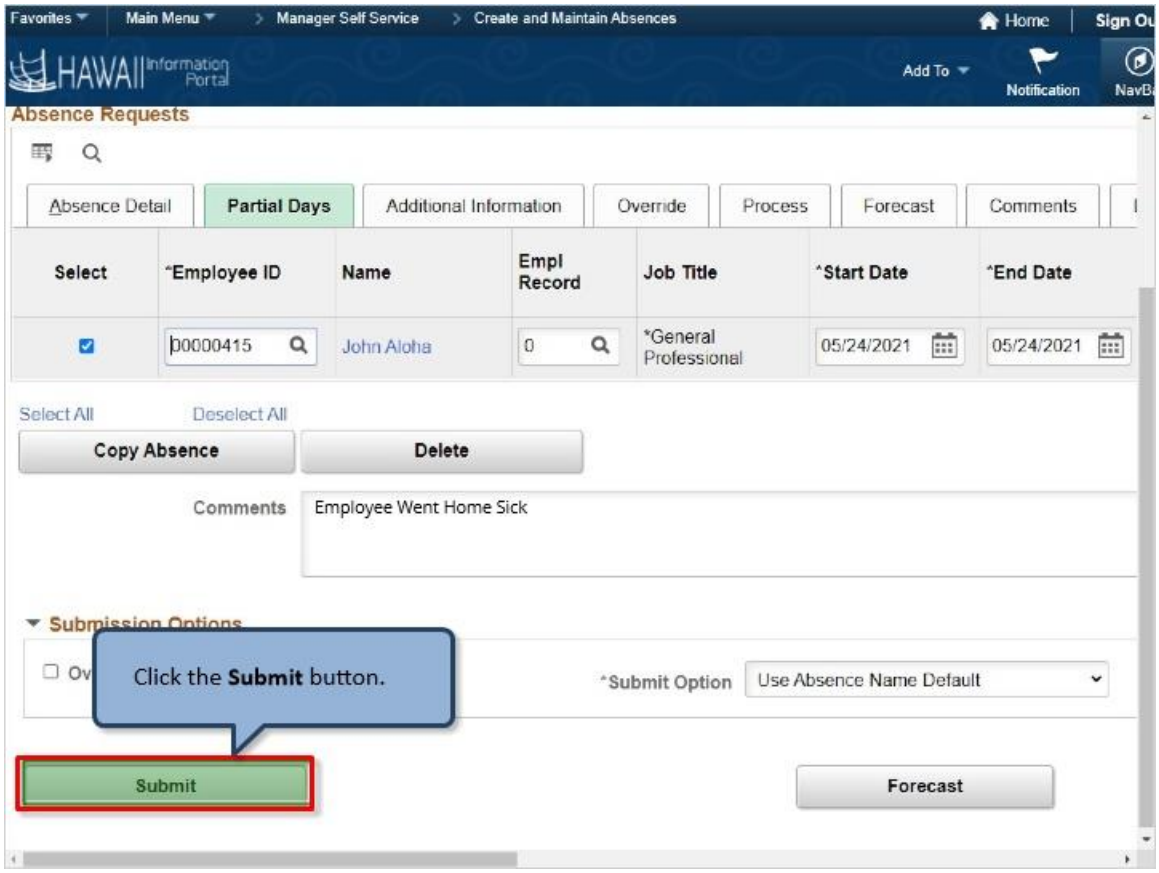


The **Use Absence Name Default** routes the absence request to the supervisor for approval.

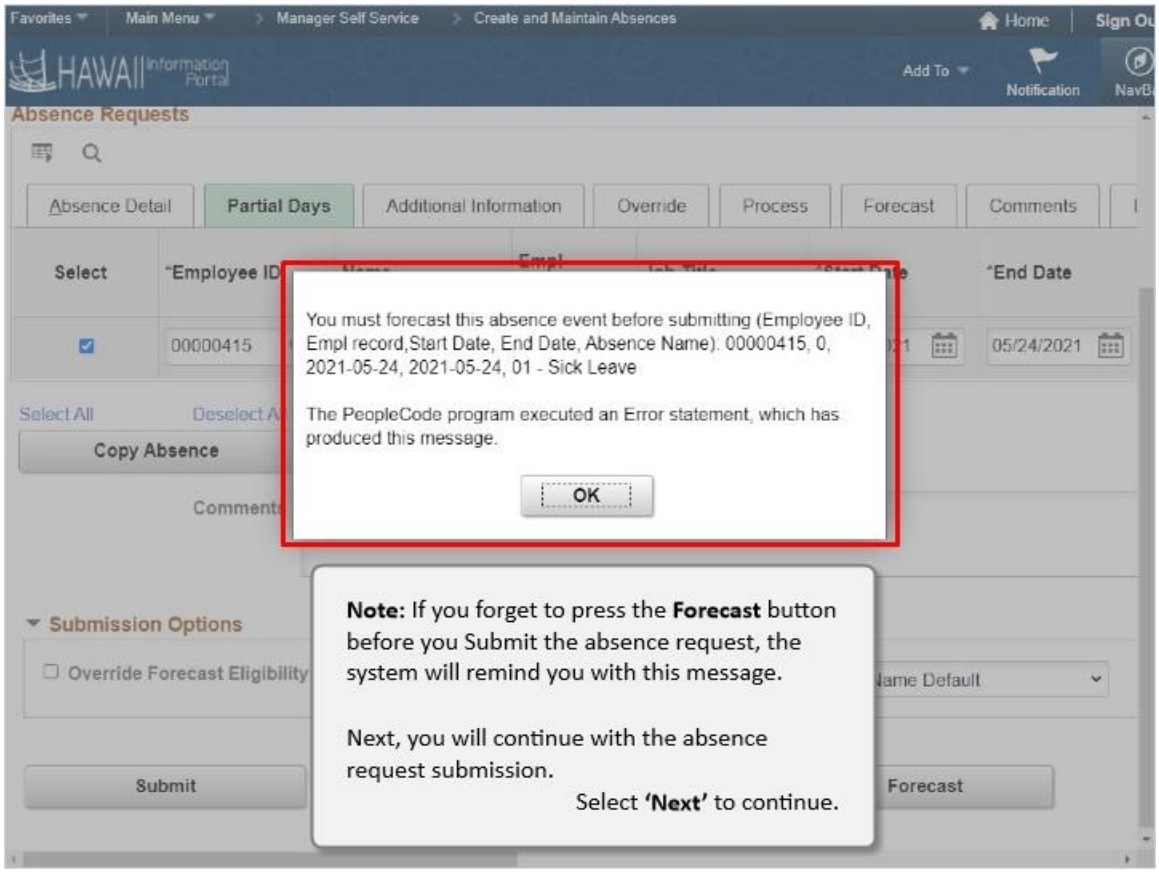
Click the **'Use Absence Name Default'** option



Click the **'Select'** checkbox.

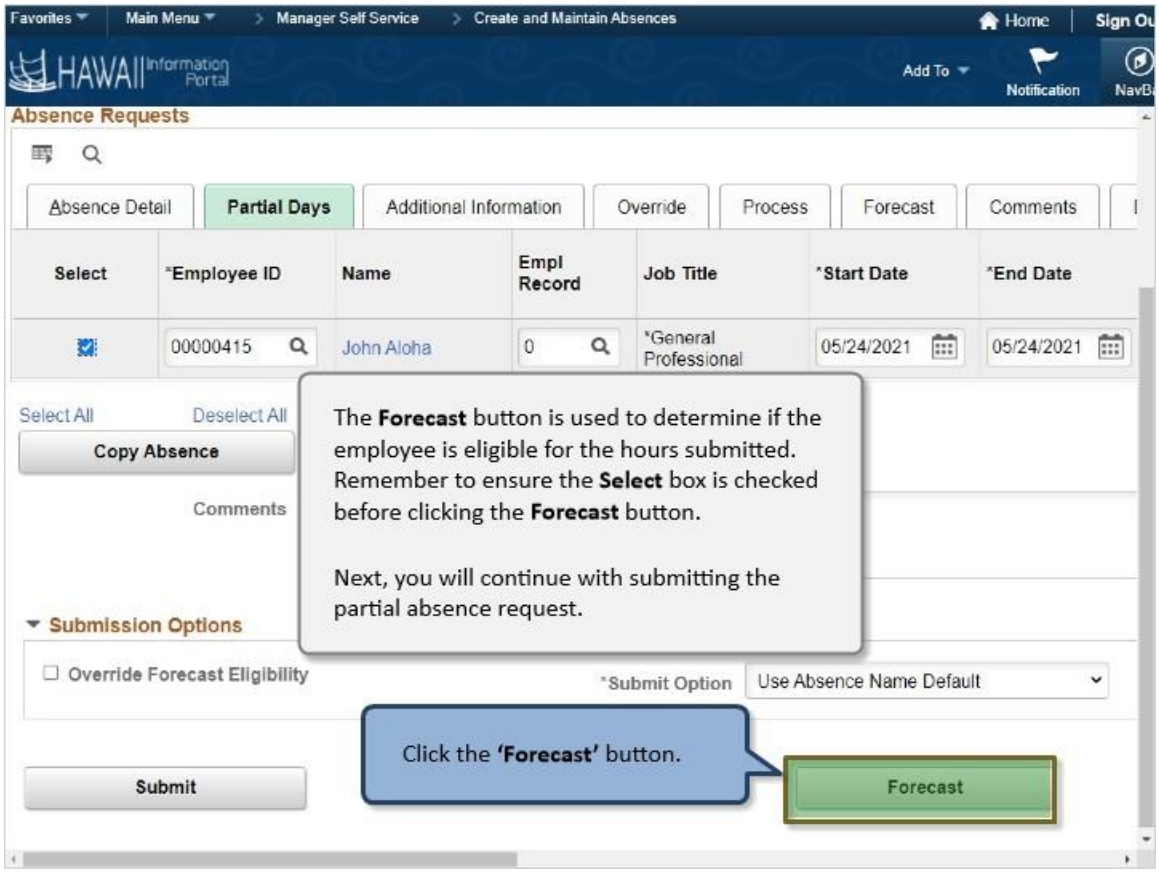


Click the **Submit** button.



Note: If you forget to press the **Forecast** button before you Submit the absence request, the system will remind you with this message.

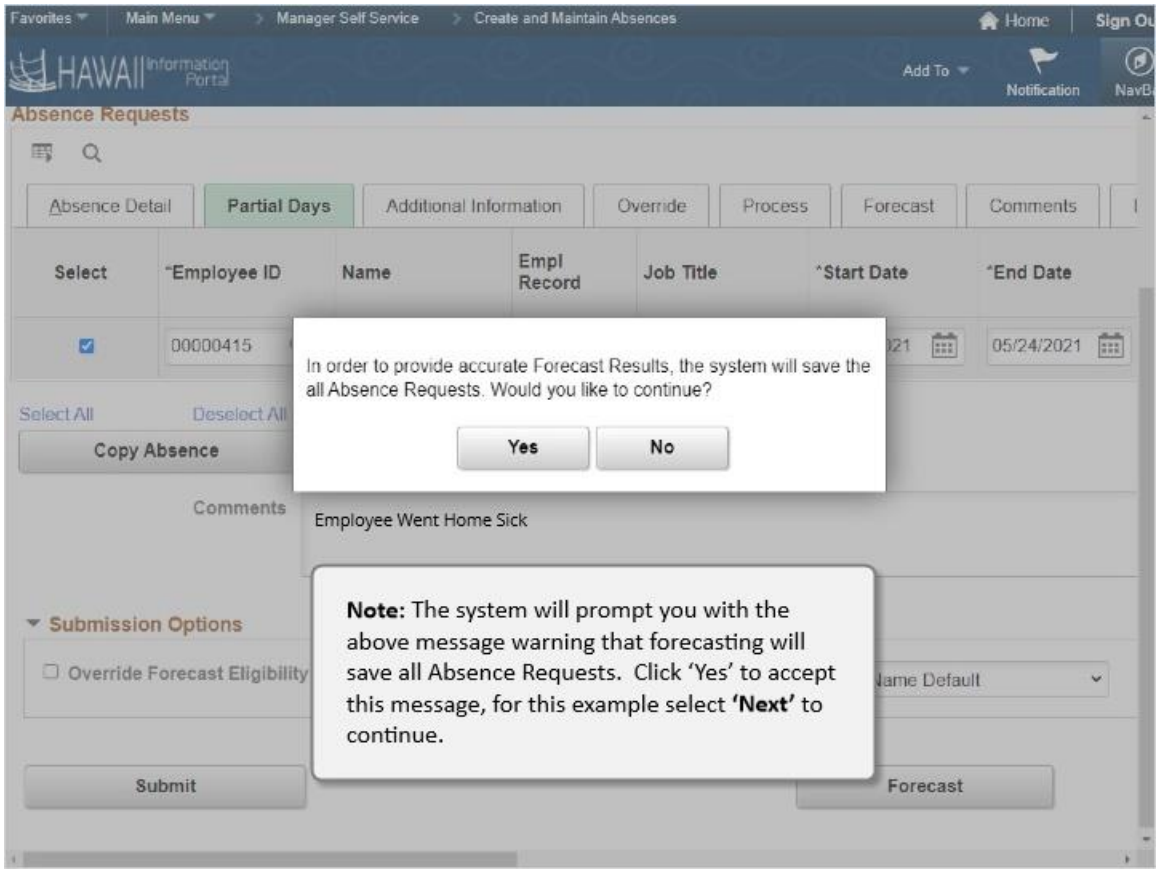
Next, you will continue with the absence request submission.



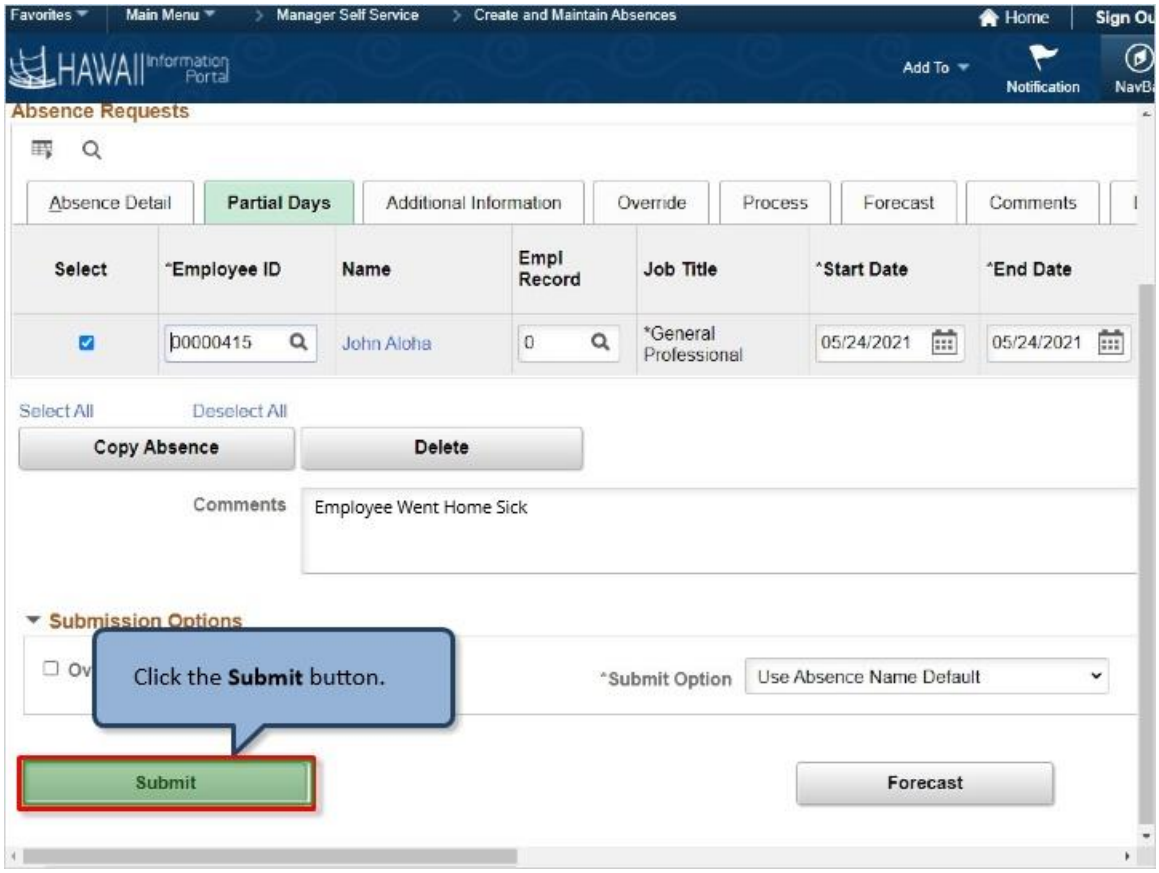
The **Forecast** button is used to determine if the employee is eligible for the hours submitted. Remember to ensure the **Select** box is checked before clicking the **Forecast** button.

Next, you will continue with submitting the partial absence request.

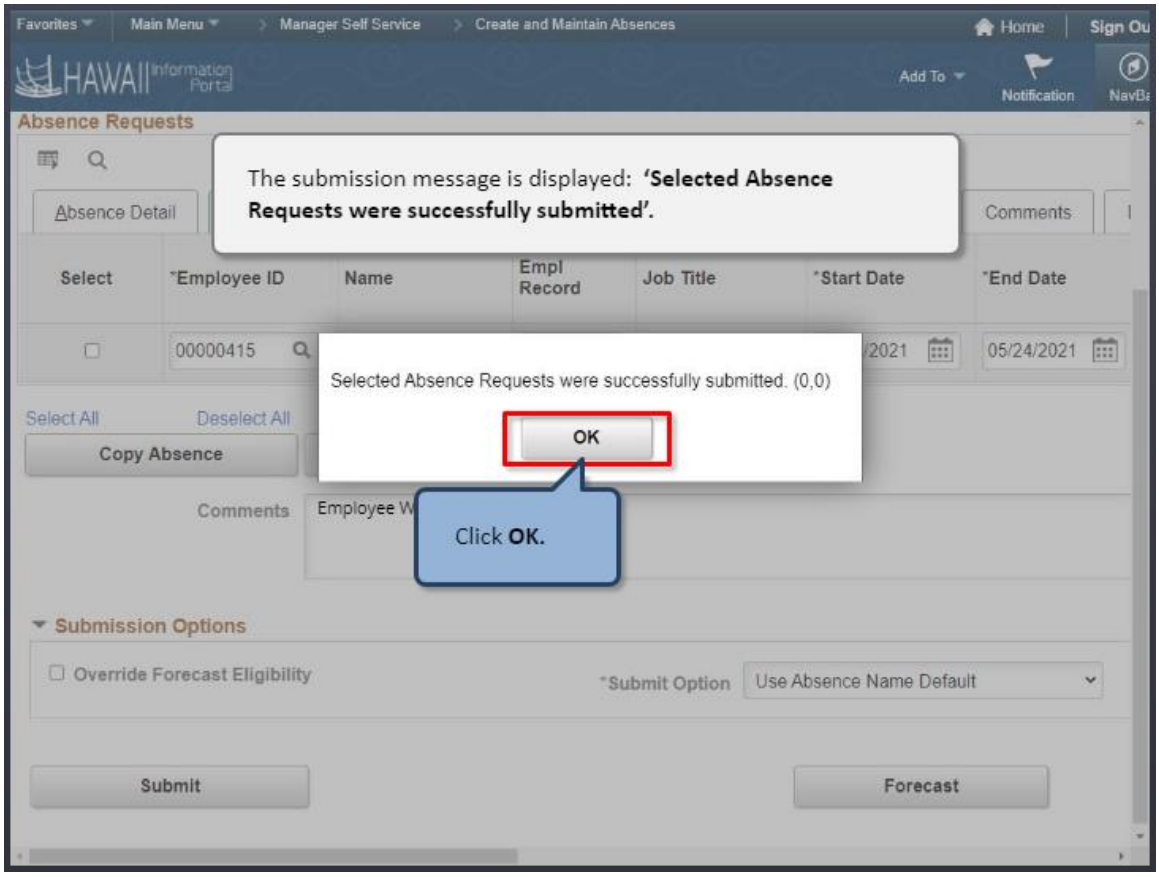
Click the **'Forecast'** button.



Note: The system will prompt you with the above message warning that forecasting will save all Absence Requests. Click 'Yes' to accept this message, for this example select **'Next'** to continue.



Click the **Submit** button.



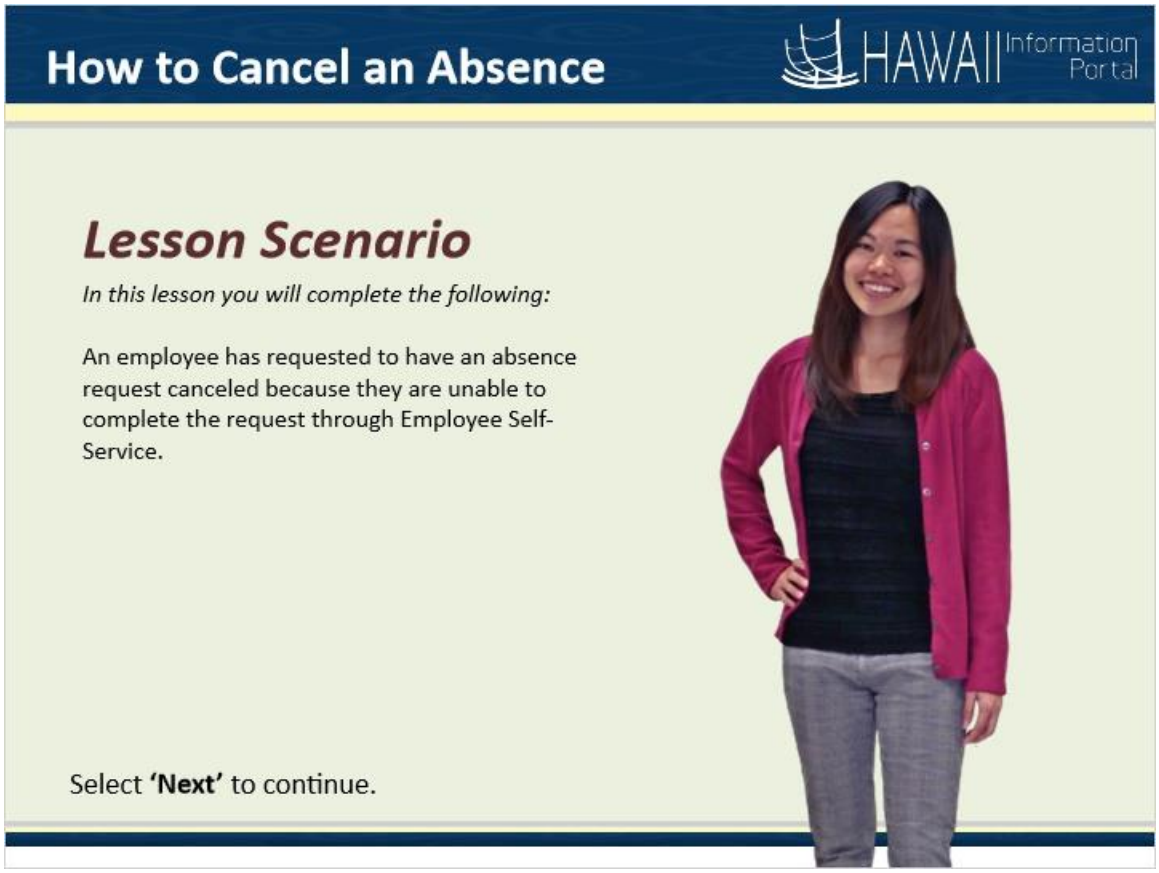
The submission message is displayed: **'Selected Absence Requests were successfully submitted'**.

Click **OK.**

Congratulations!

You've successfully completed this lesson.

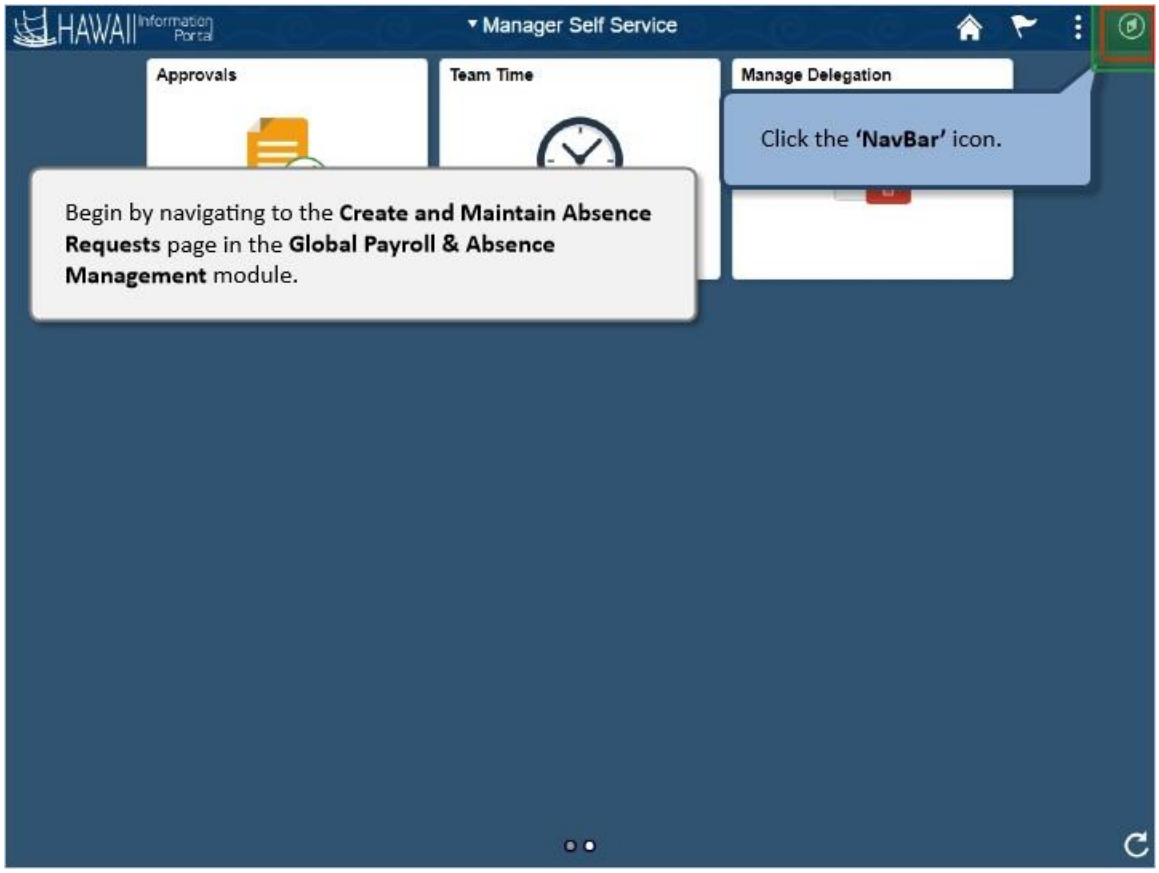
HOW TO CANCEL AN ABSENCE



Lesson Scenario

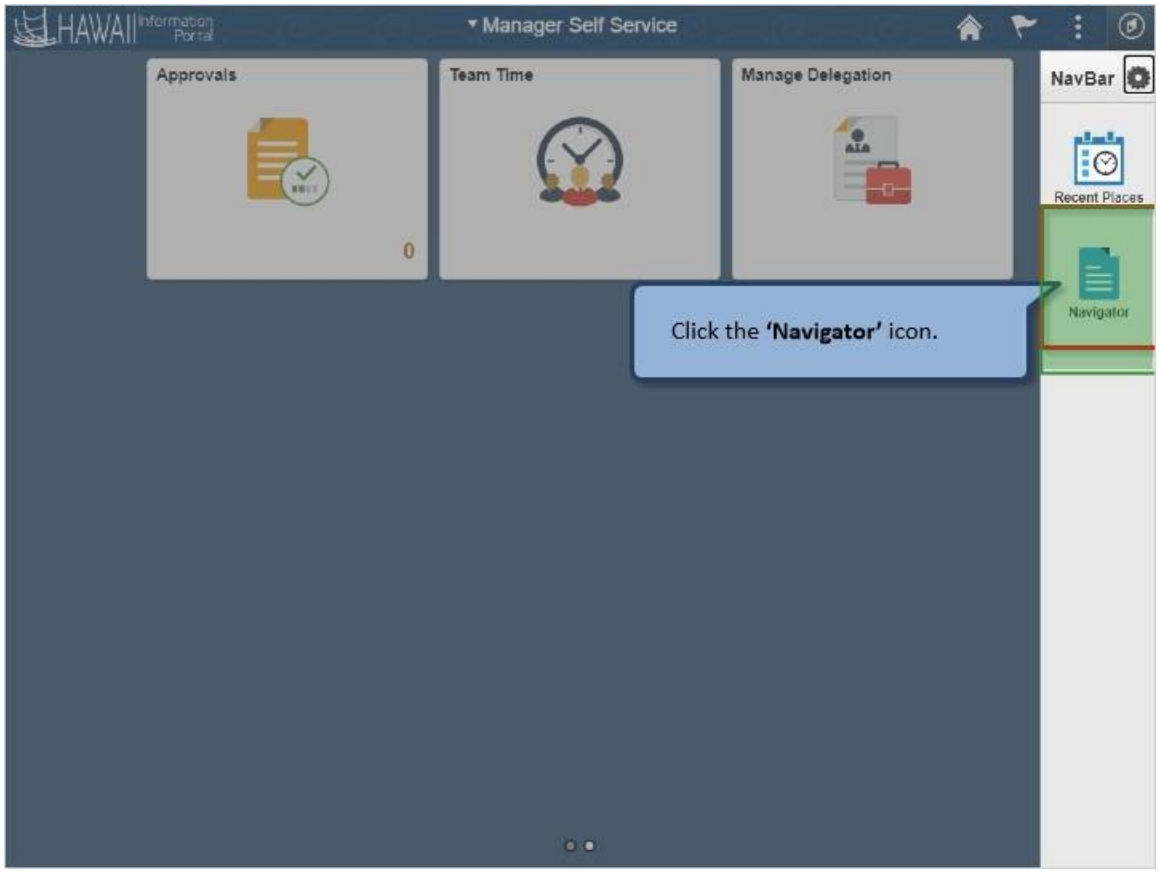
In this lesson you will complete the following:

An employee has requested to have an absence request canceled because they are unable to complete the request through Employee Self-Service.

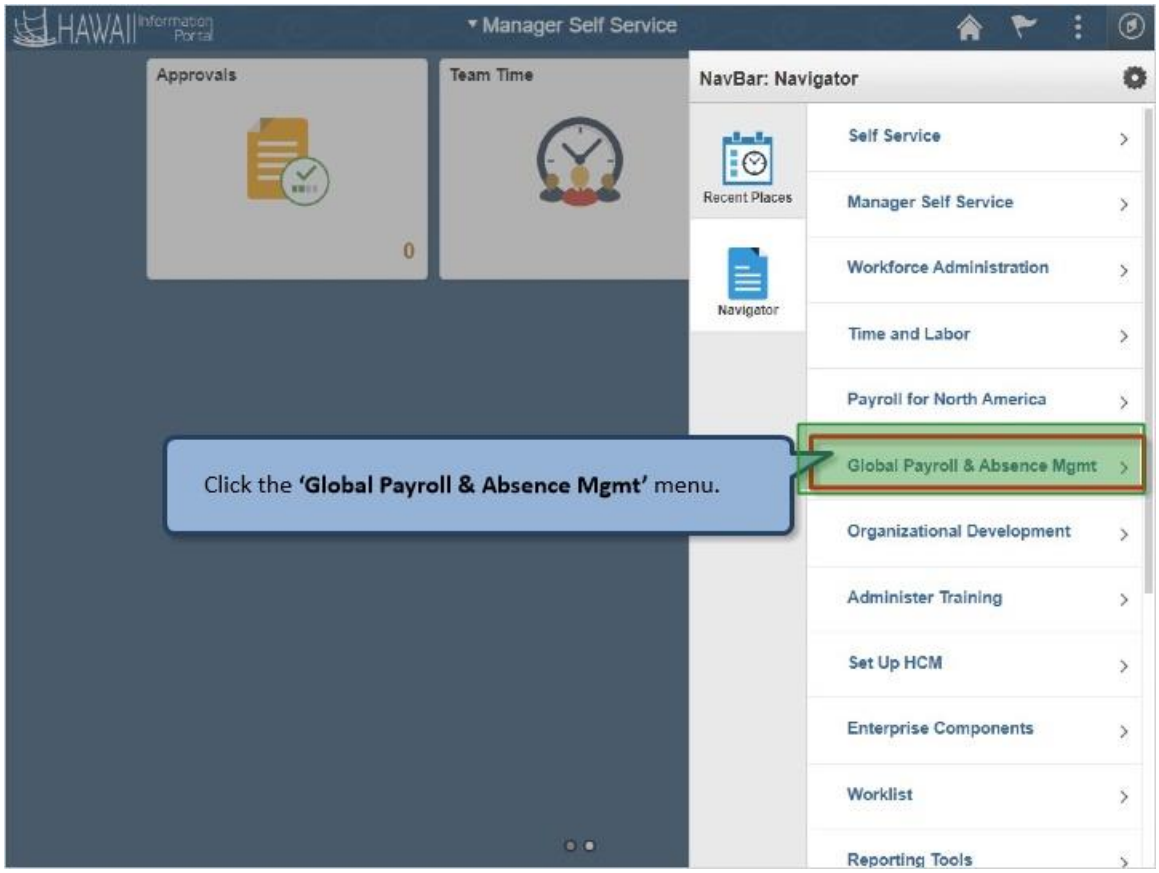


Begin by navigating to the **Create and Maintain Absence Requests** page in the **Global Payroll & Absence Management** module.

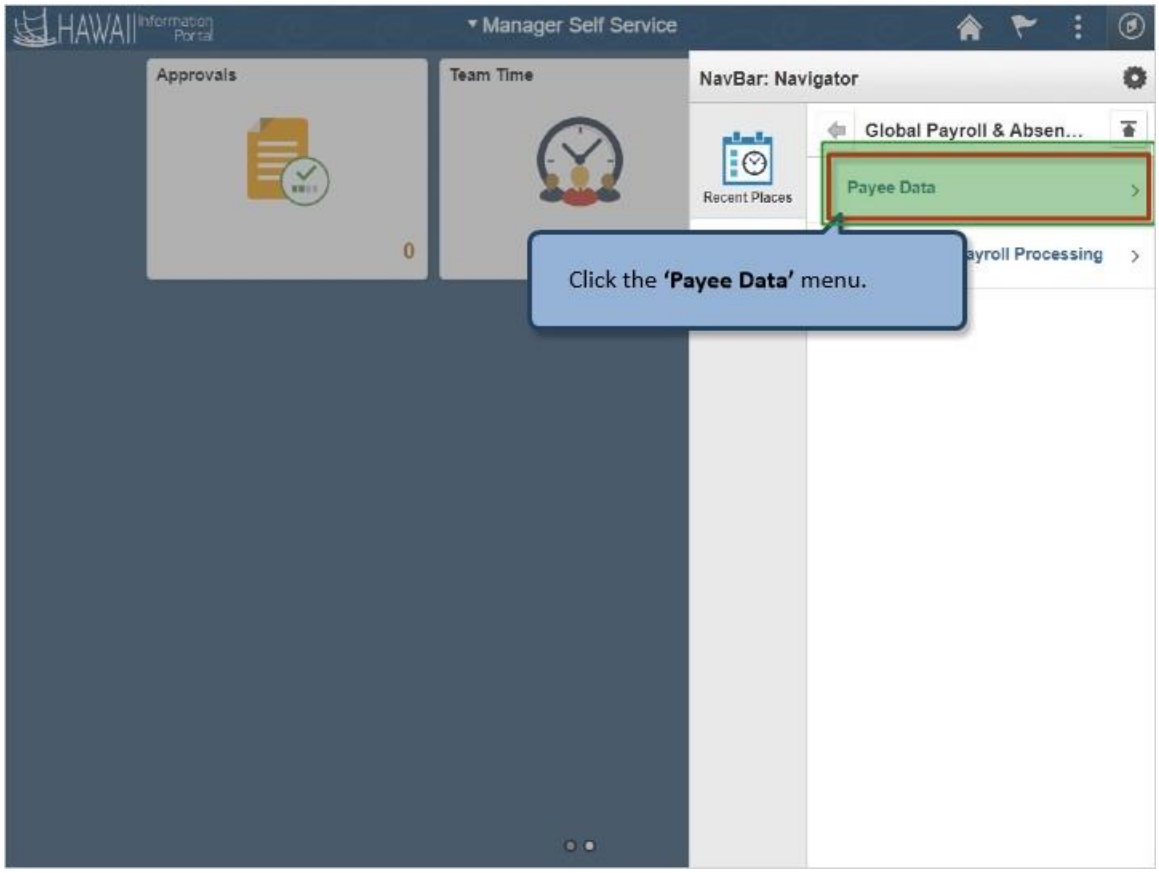
Click the **'NavBar'** icon.



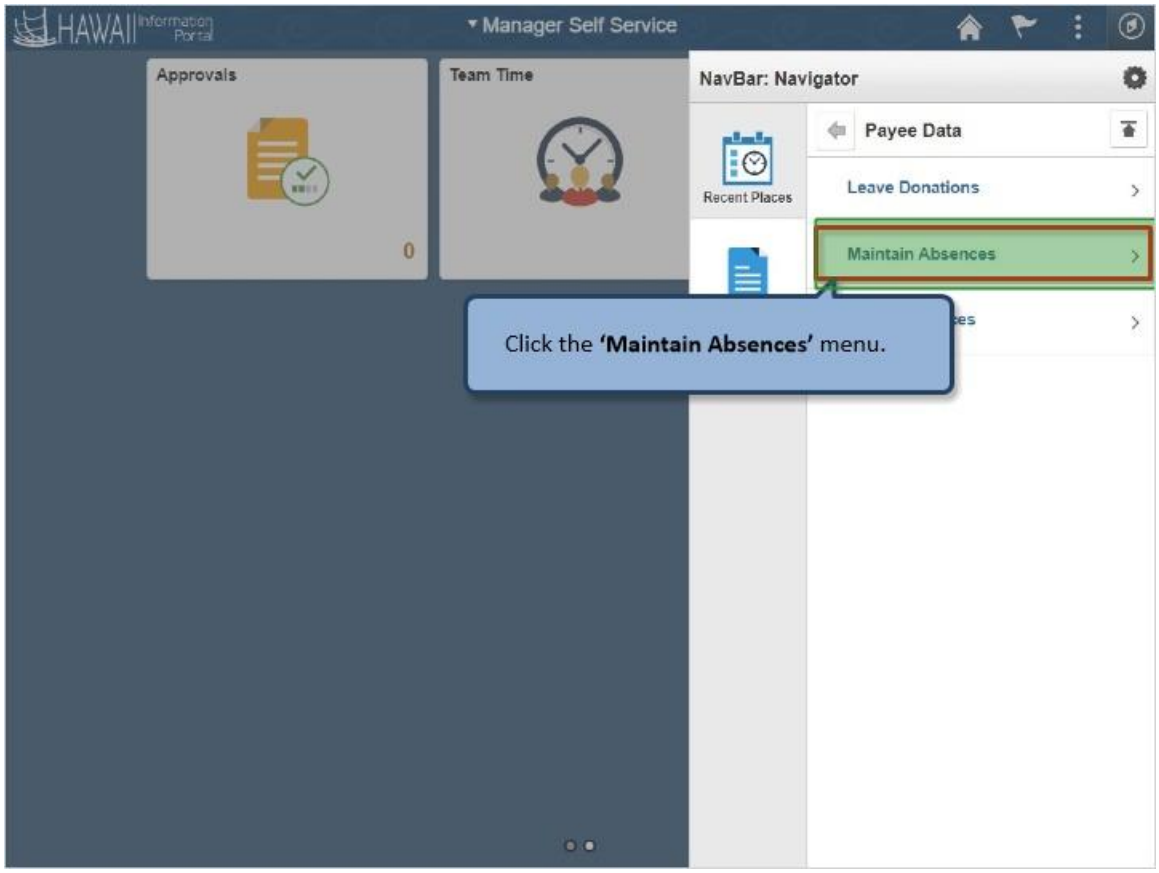
Click the **'Navigator'** icon.



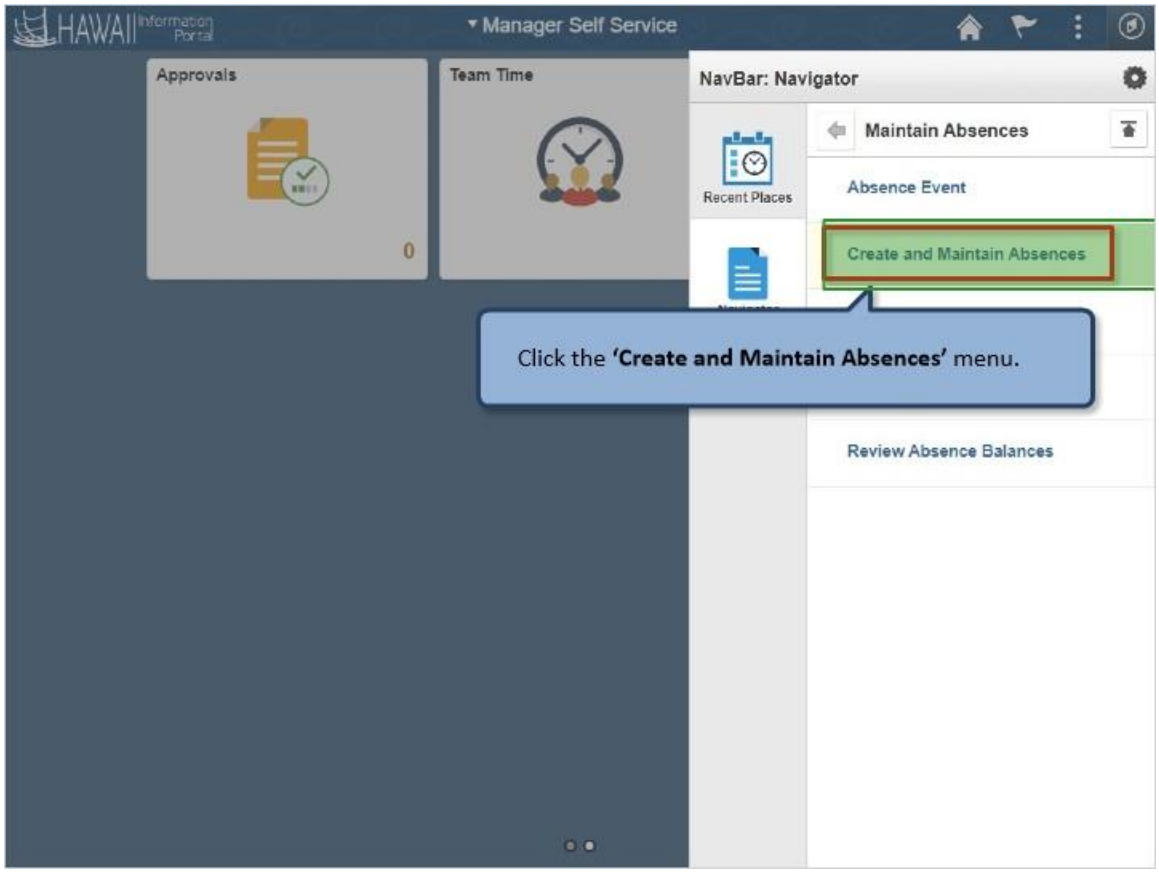
Click the **'Global Payroll & Absence Mgmt'** menu.



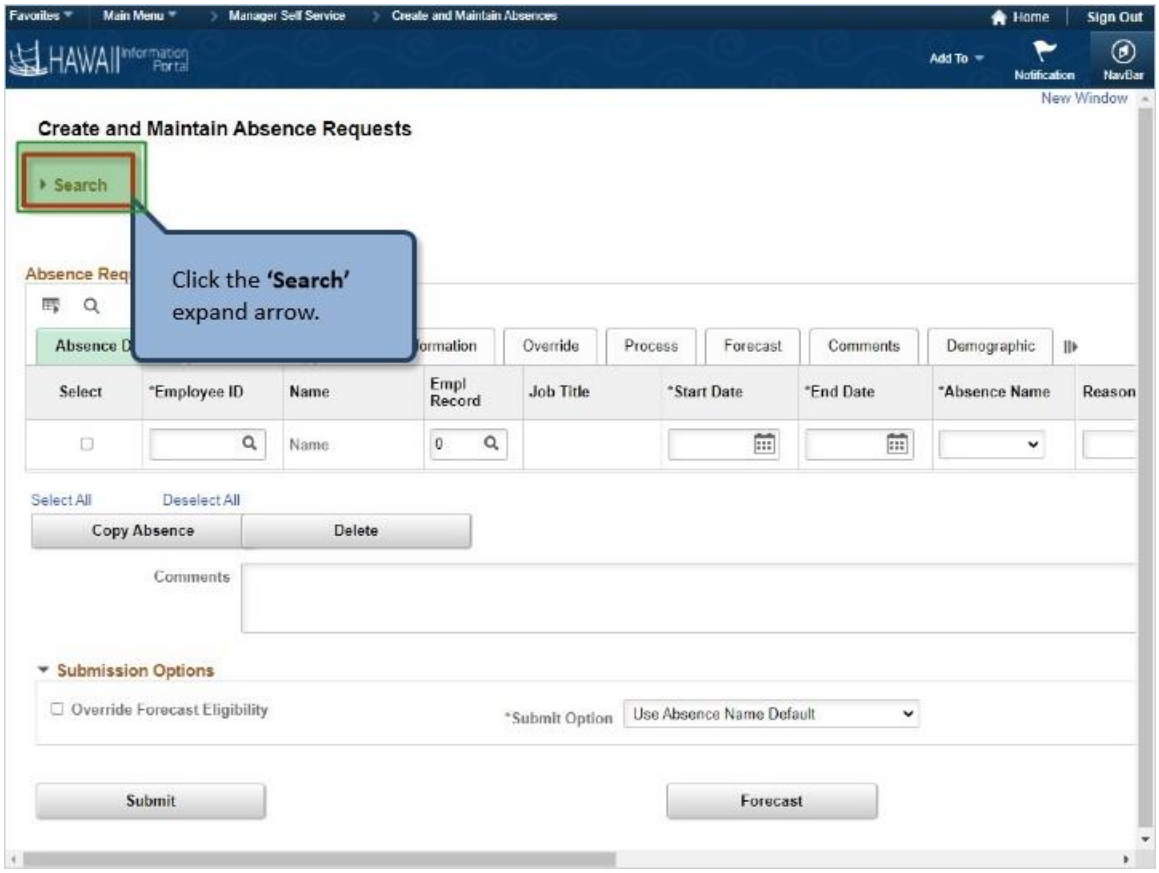
Click the **'Payee Data'** menu.



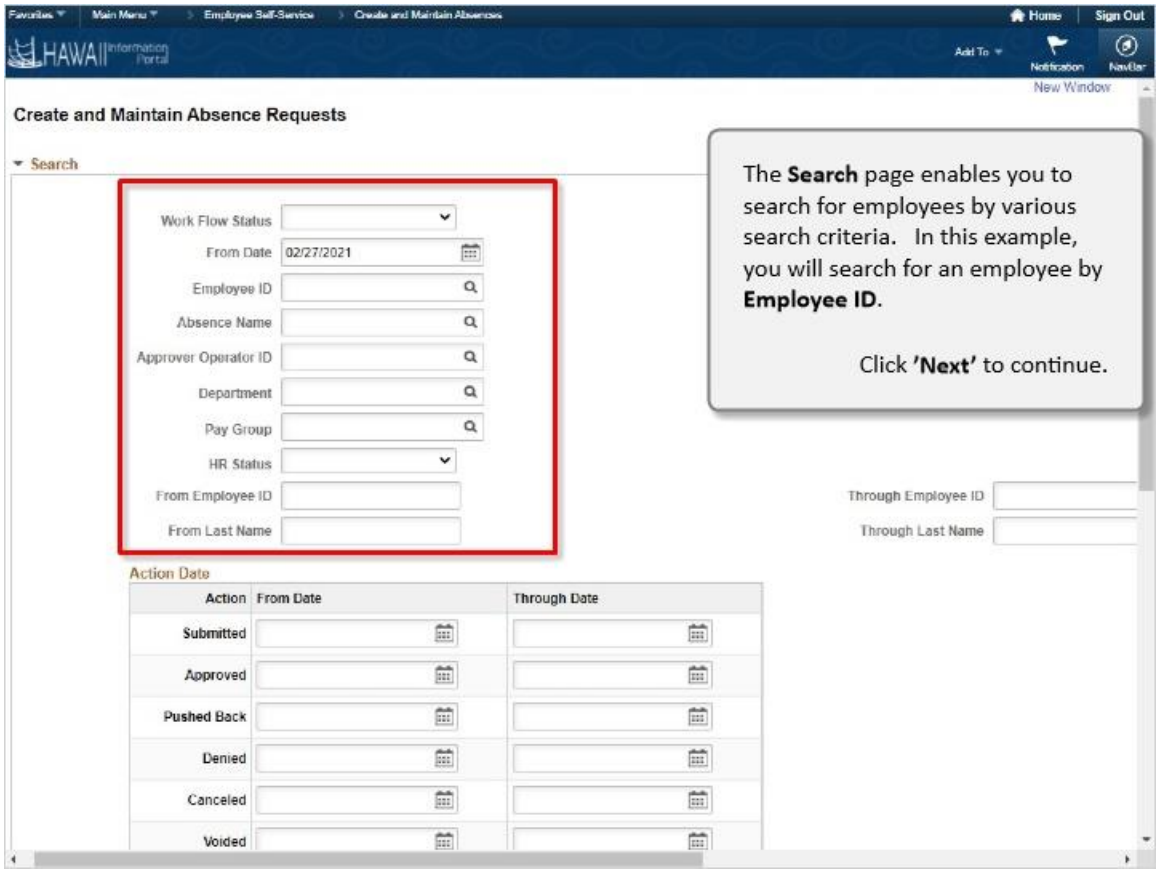
Click the **'Maintain Absences'** menu.



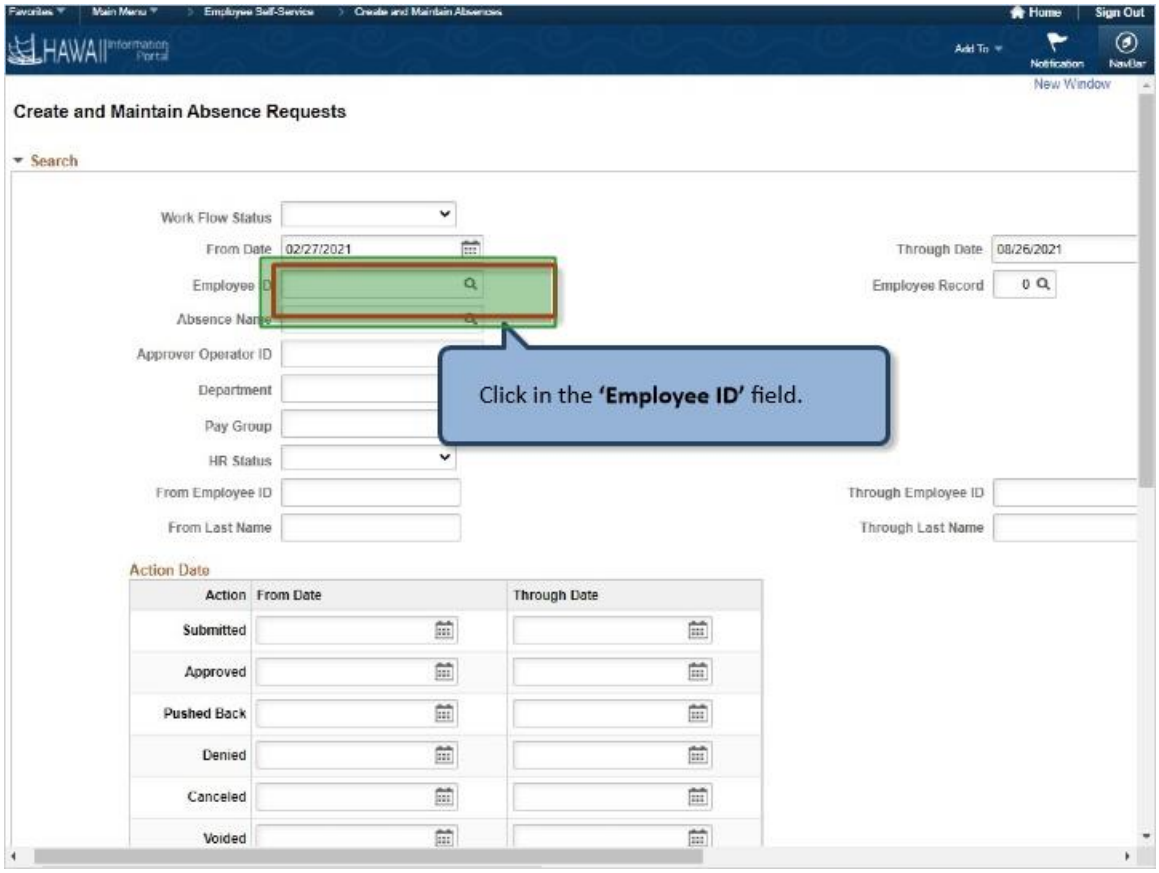
Click the **'Create and Maintain Absences'** menu.



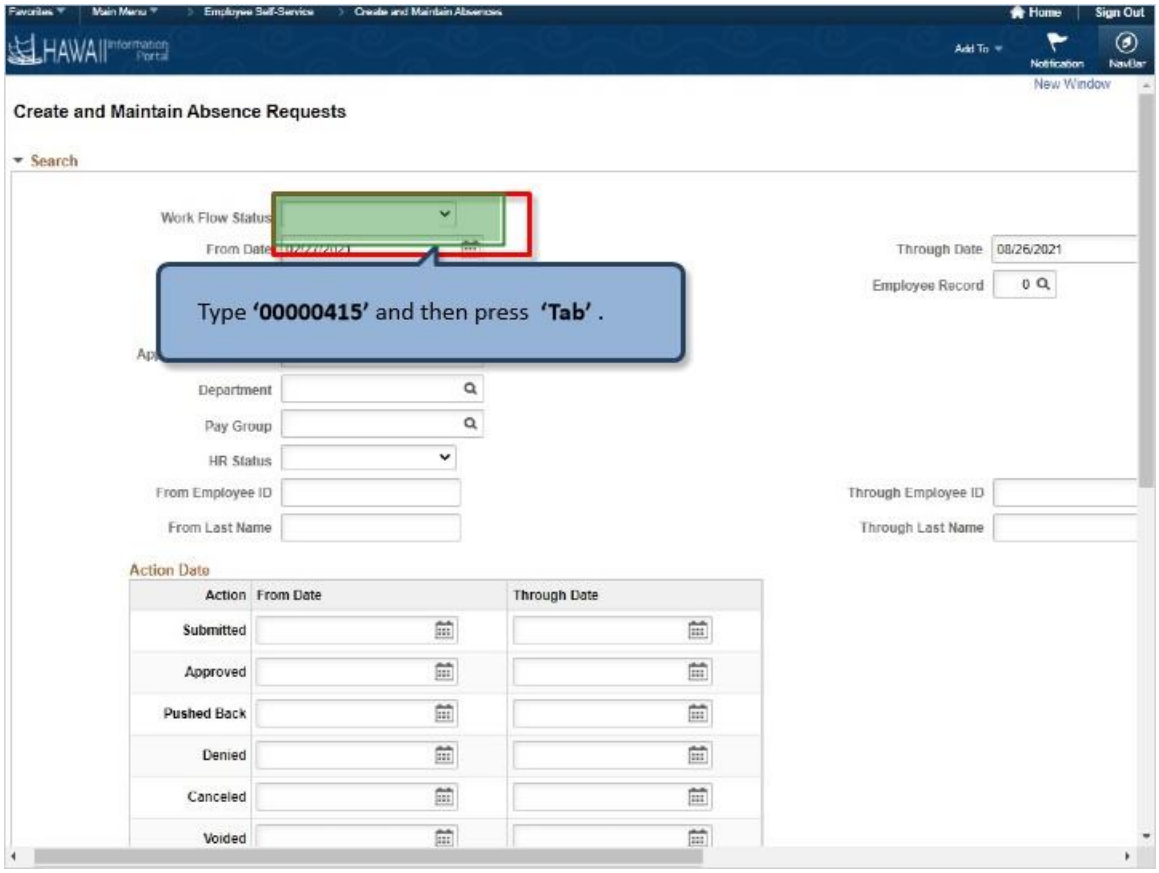
Click the **'Search'** expand arrow.



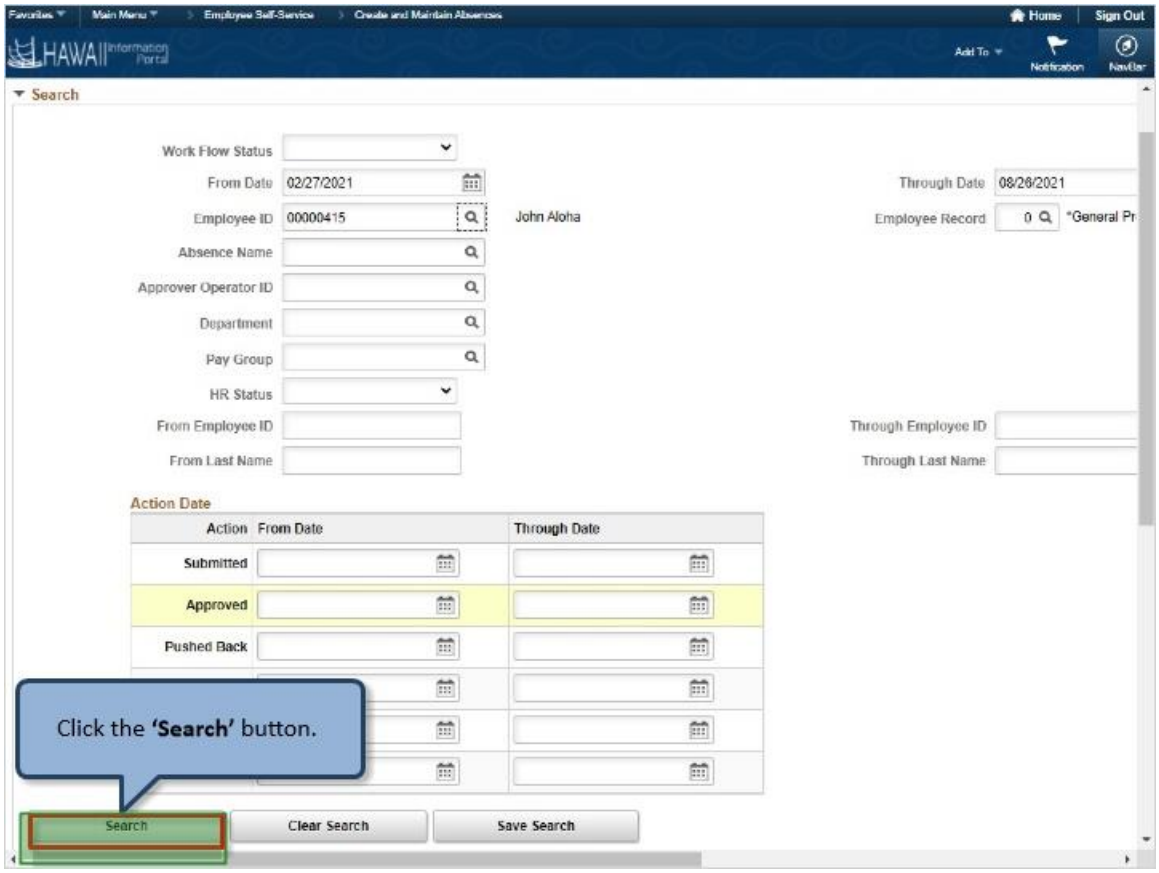
The **Search** page enables you to search for employees by various search criteria. In this example, you will search for an employee by **Employee ID**.



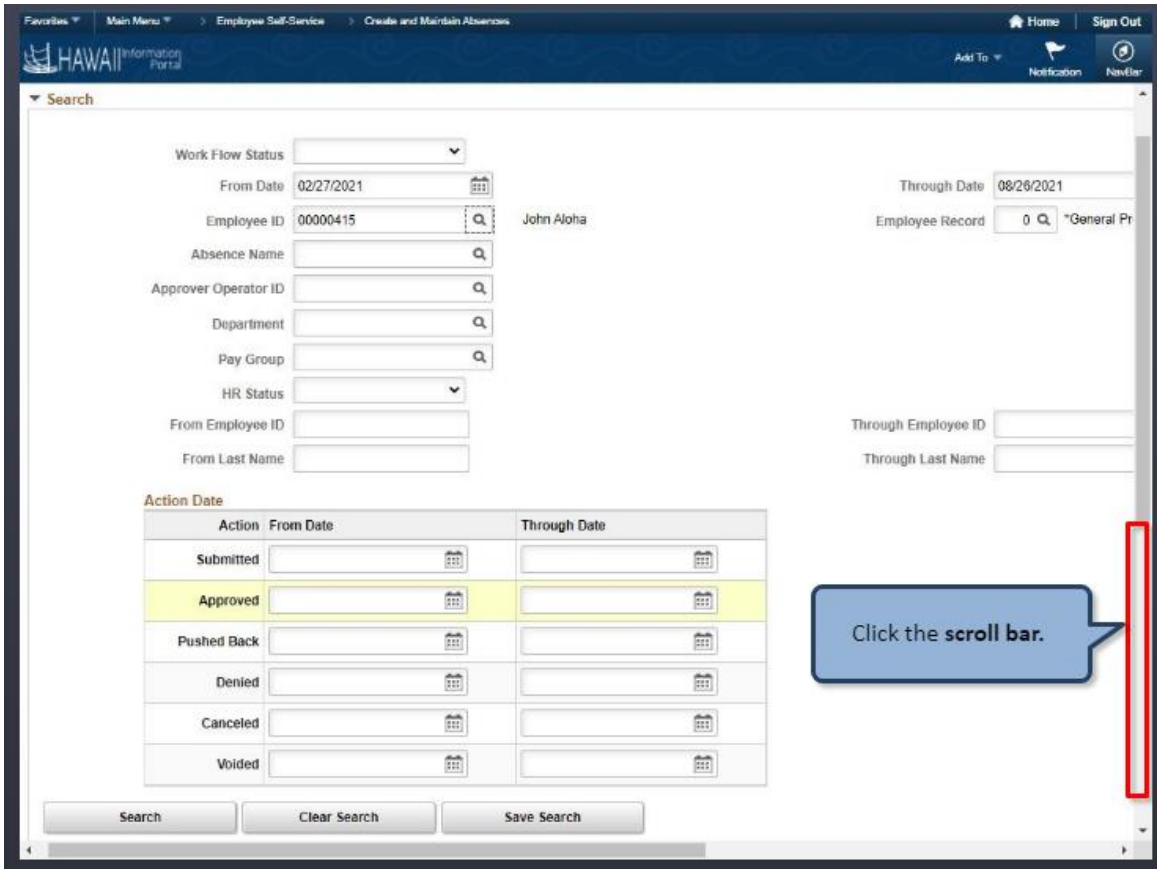
Click in the **'Employee ID'** field.



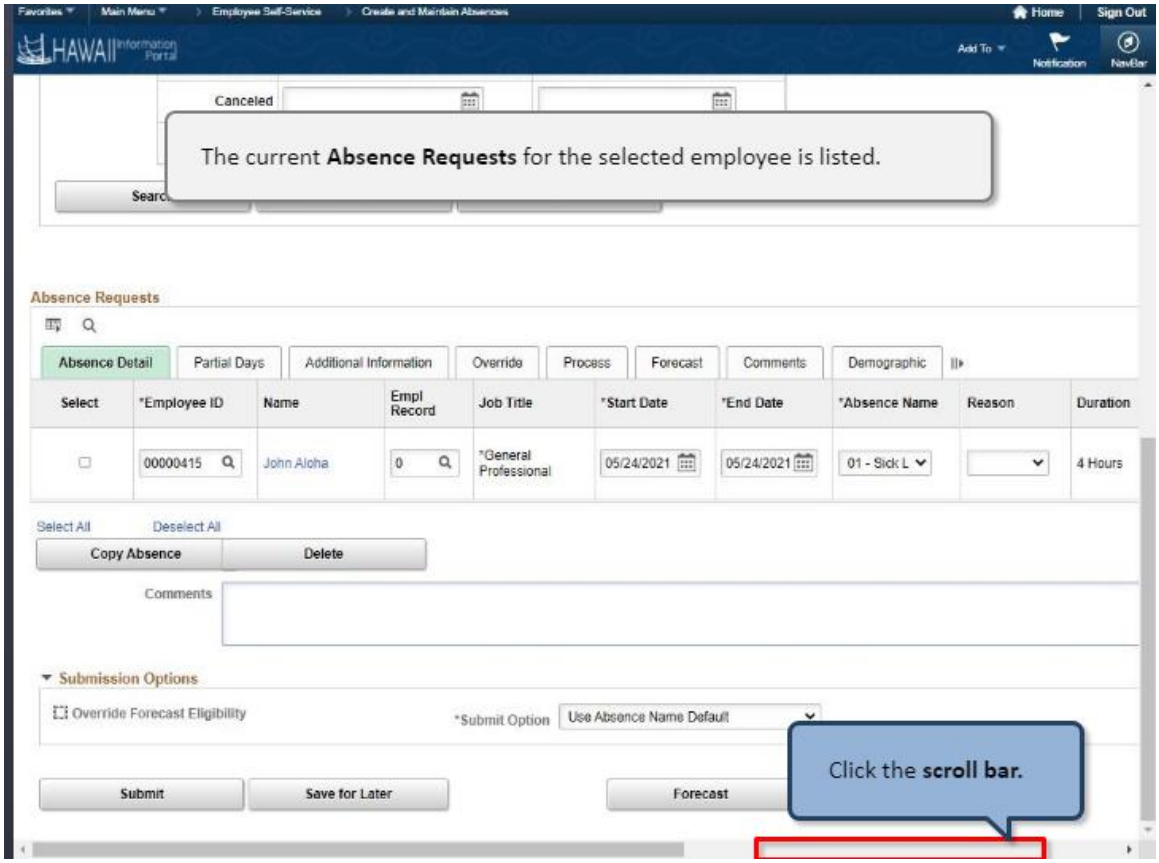
Type **'00000415'** and then press **'Tab'** .



Click the **'Search'** button.

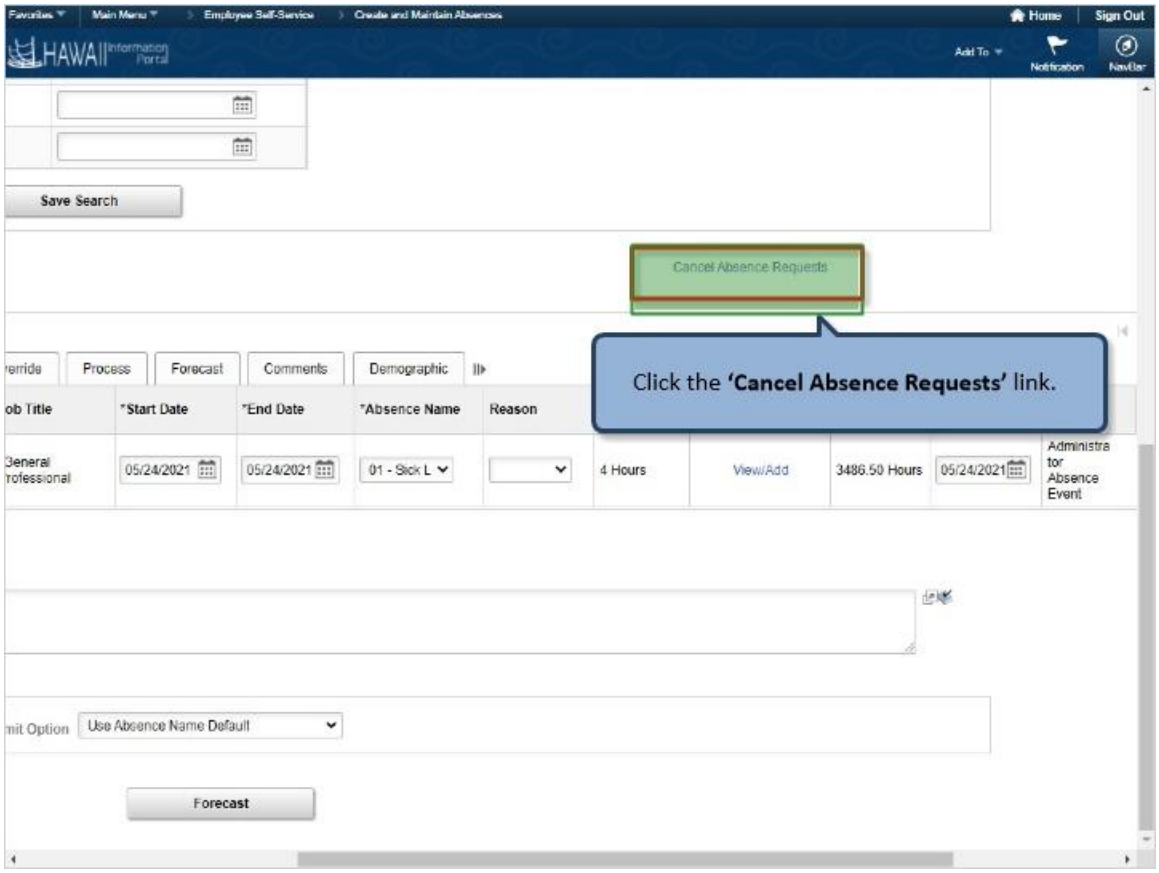


Click the **scroll bar.**

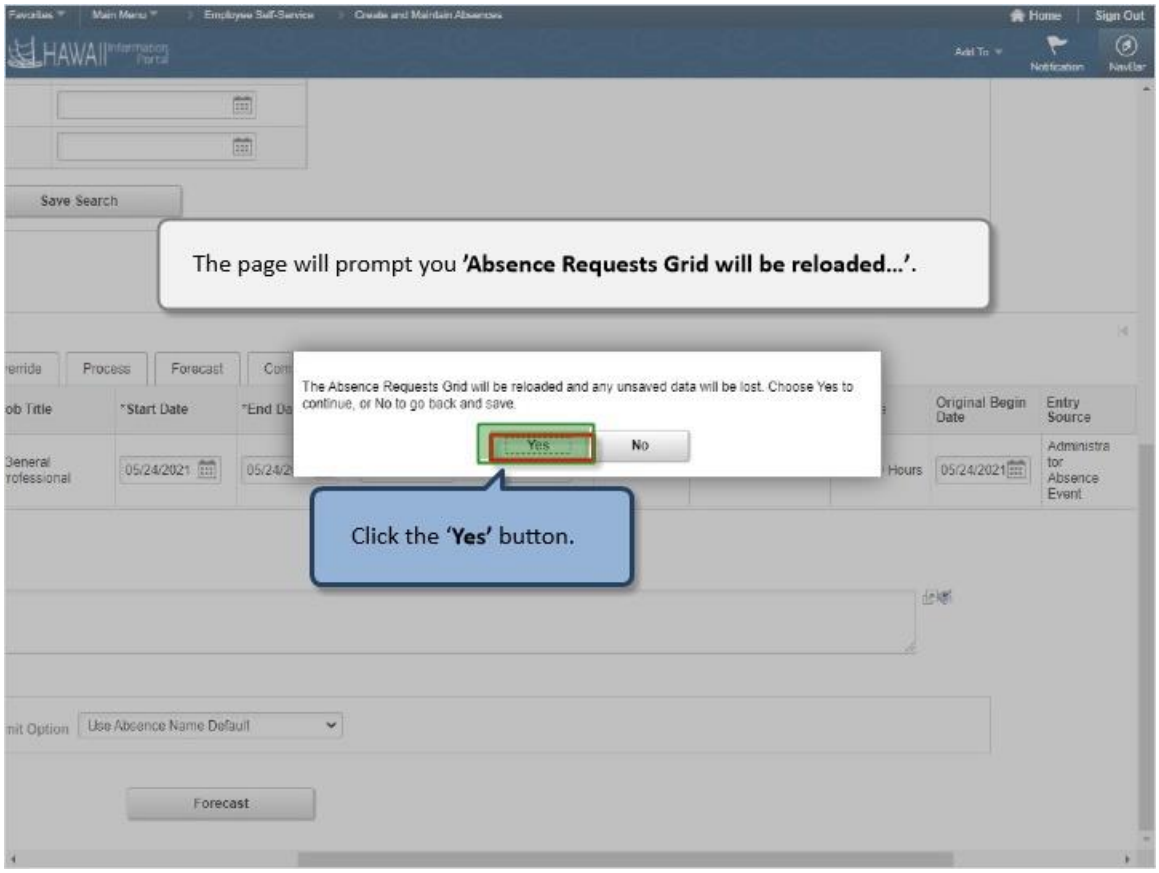


The current **Absence Requests** for the selected employee is listed.

Click the **scroll bar.**

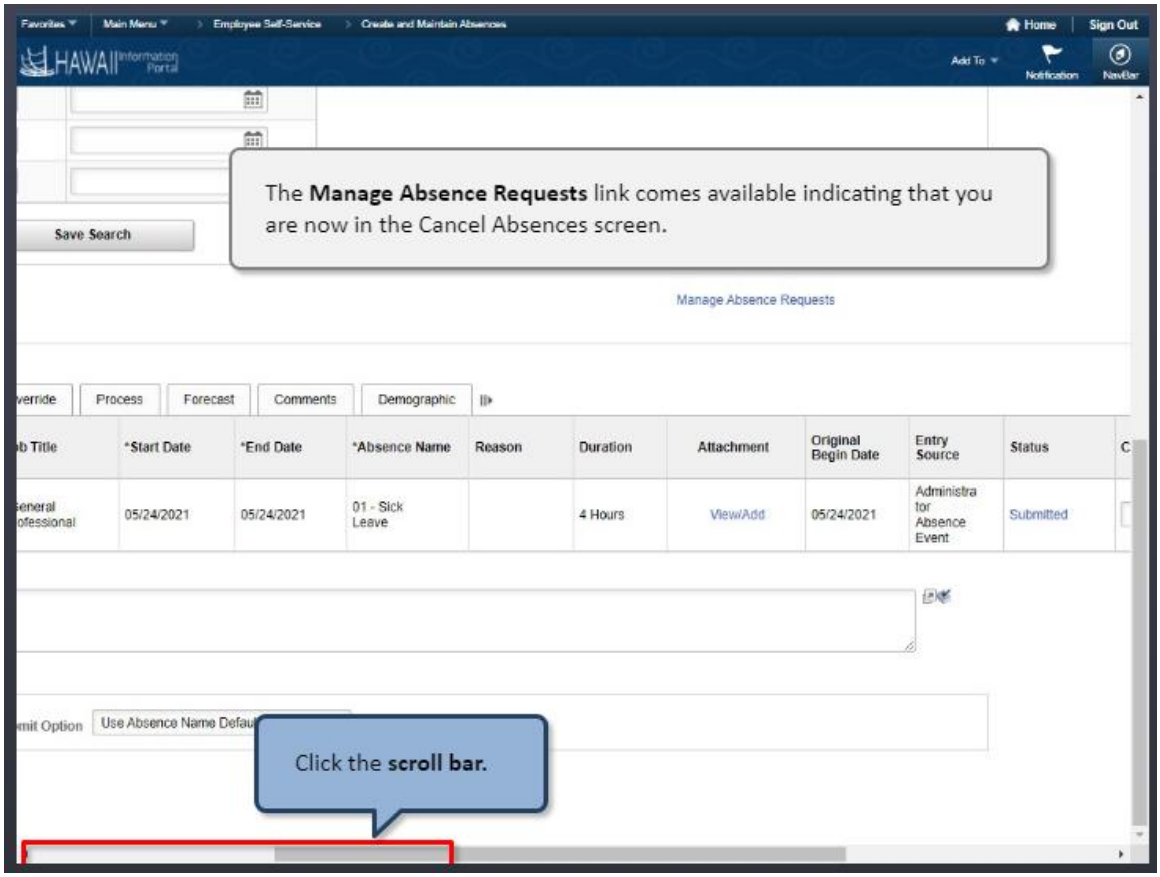


Click the **'Cancel Absence Requests'** link.



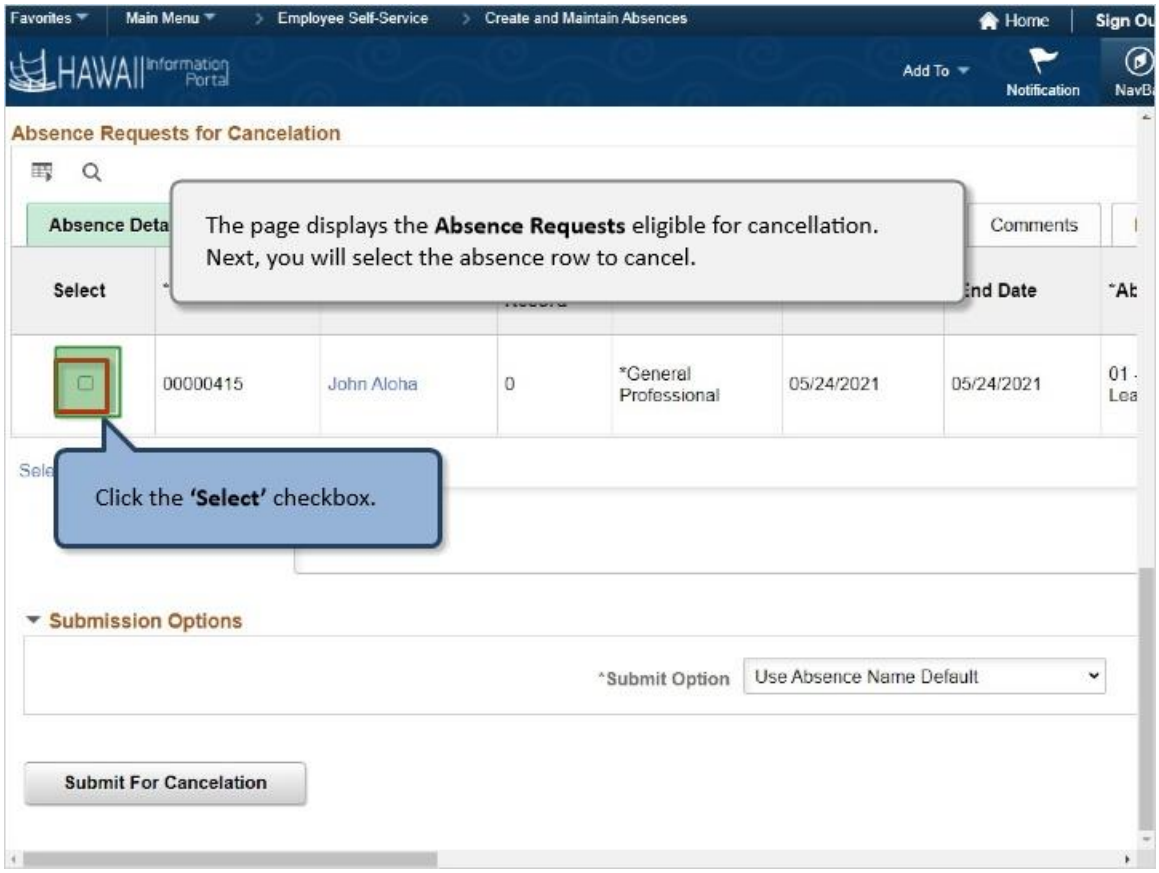
The page will prompt you **'Absence Requests Grid will be reloaded…**'.

Click the '**Yes'** button.



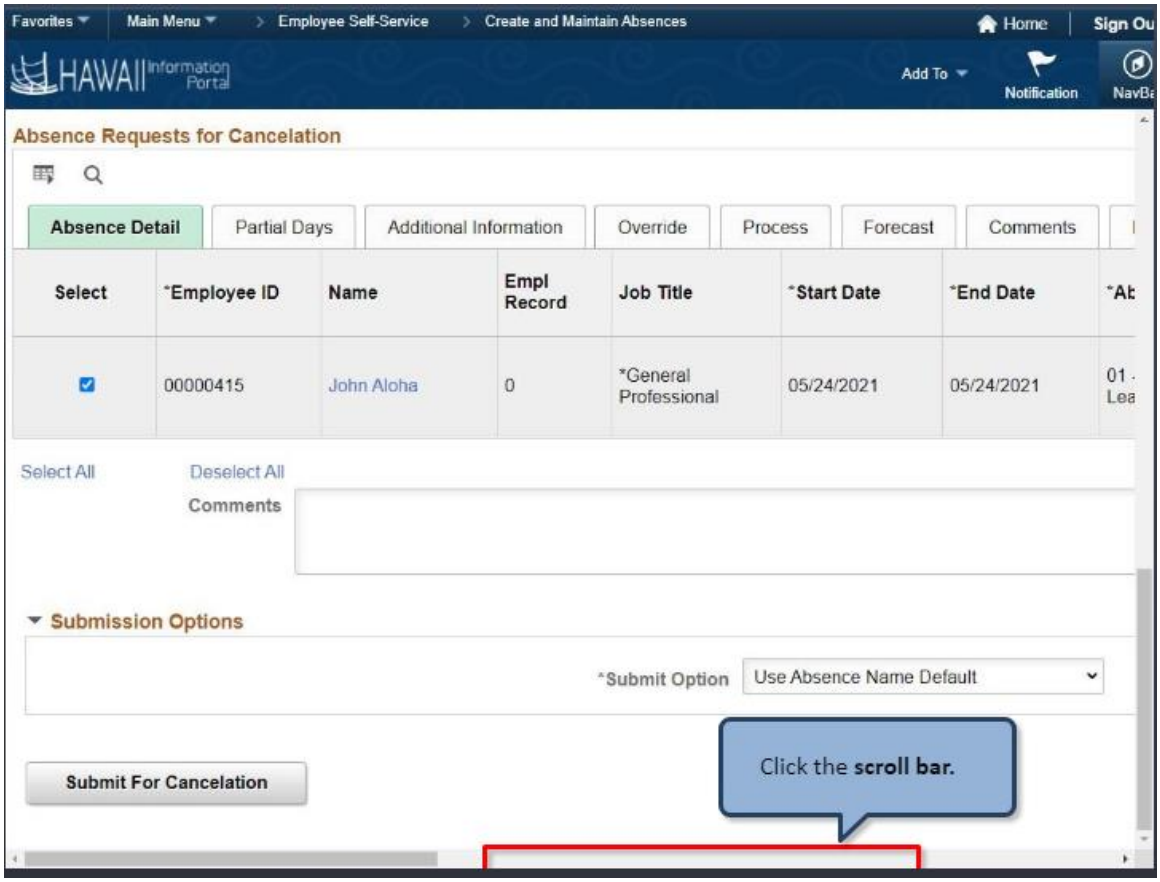
The **Manage Absence Requests** link comes available indicating that you are now in the Cancel Absences screen.

Click the **scroll bar.**

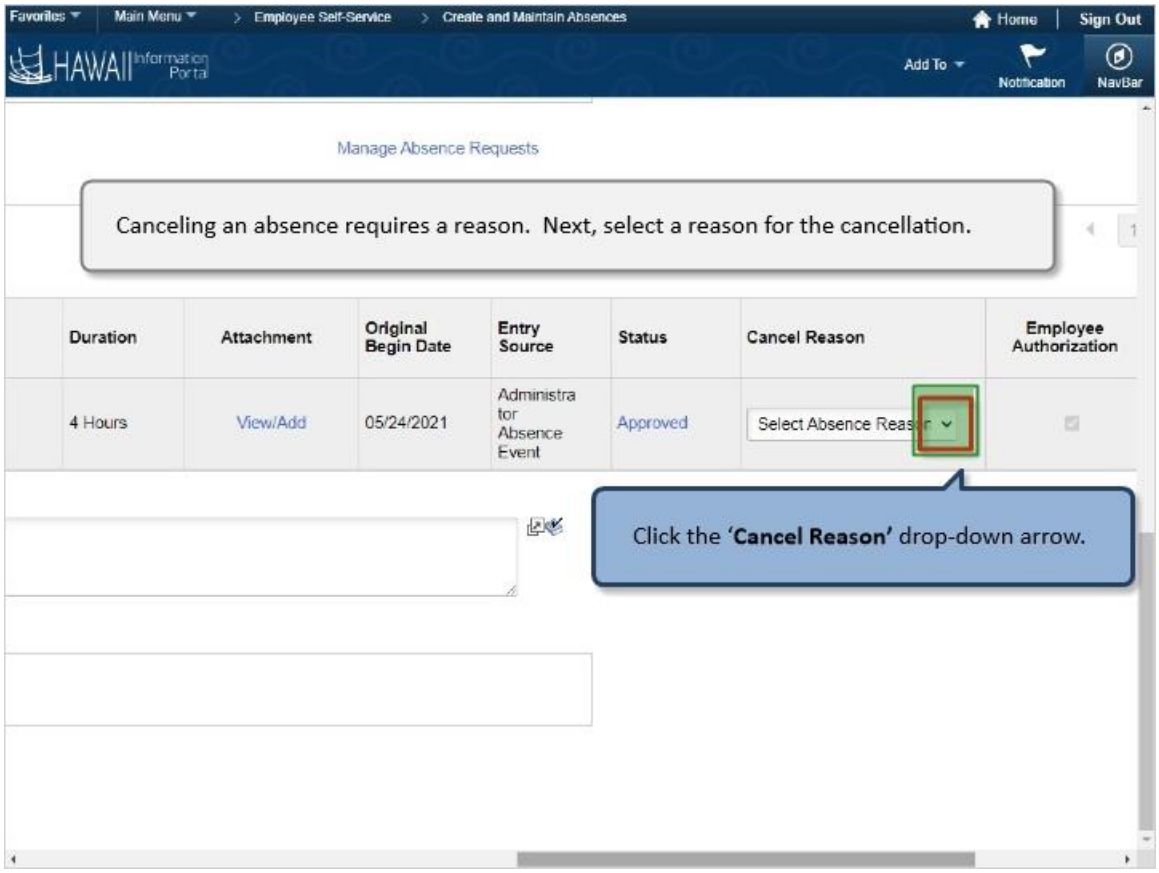


The page displays the **Absence Requests** eligible for cancellation. Next, you will select the absence row to cancel.

Click the **'Select'** checkbox.

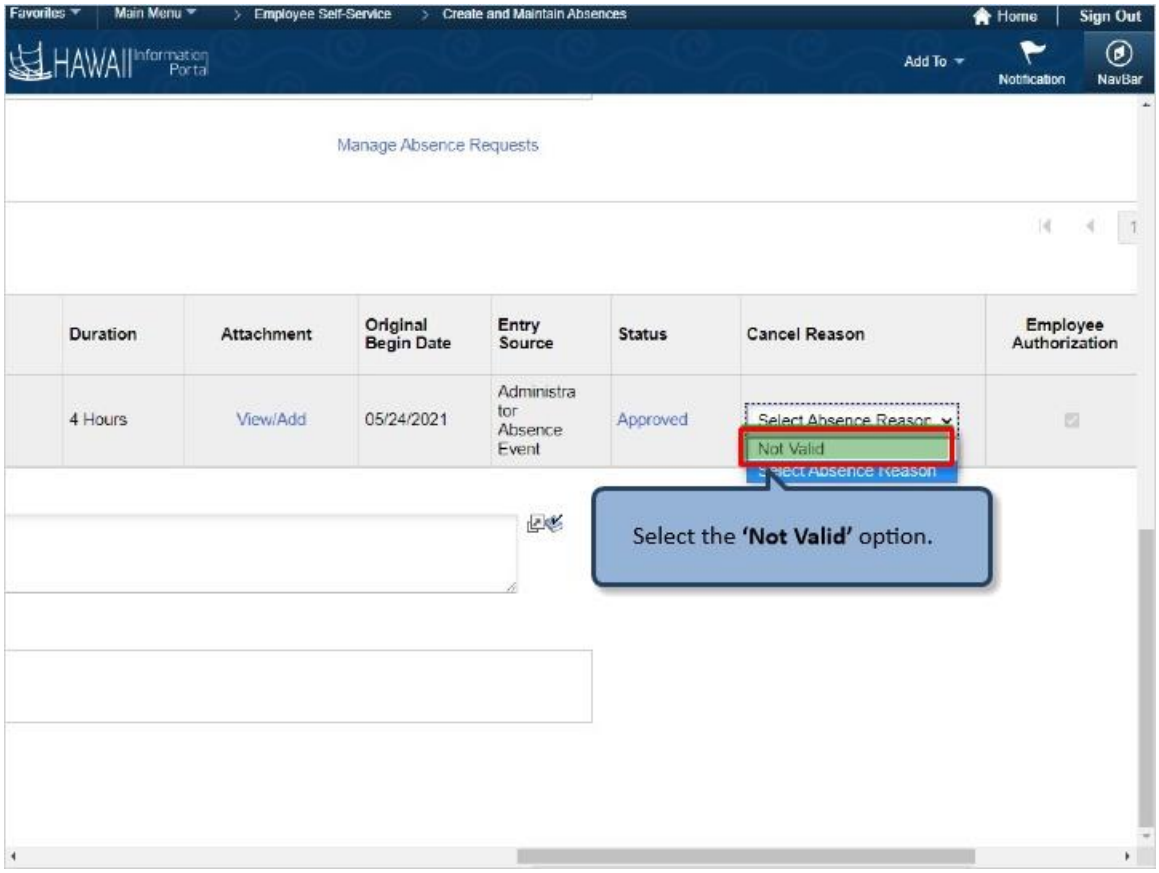


Click the **scroll bar.**

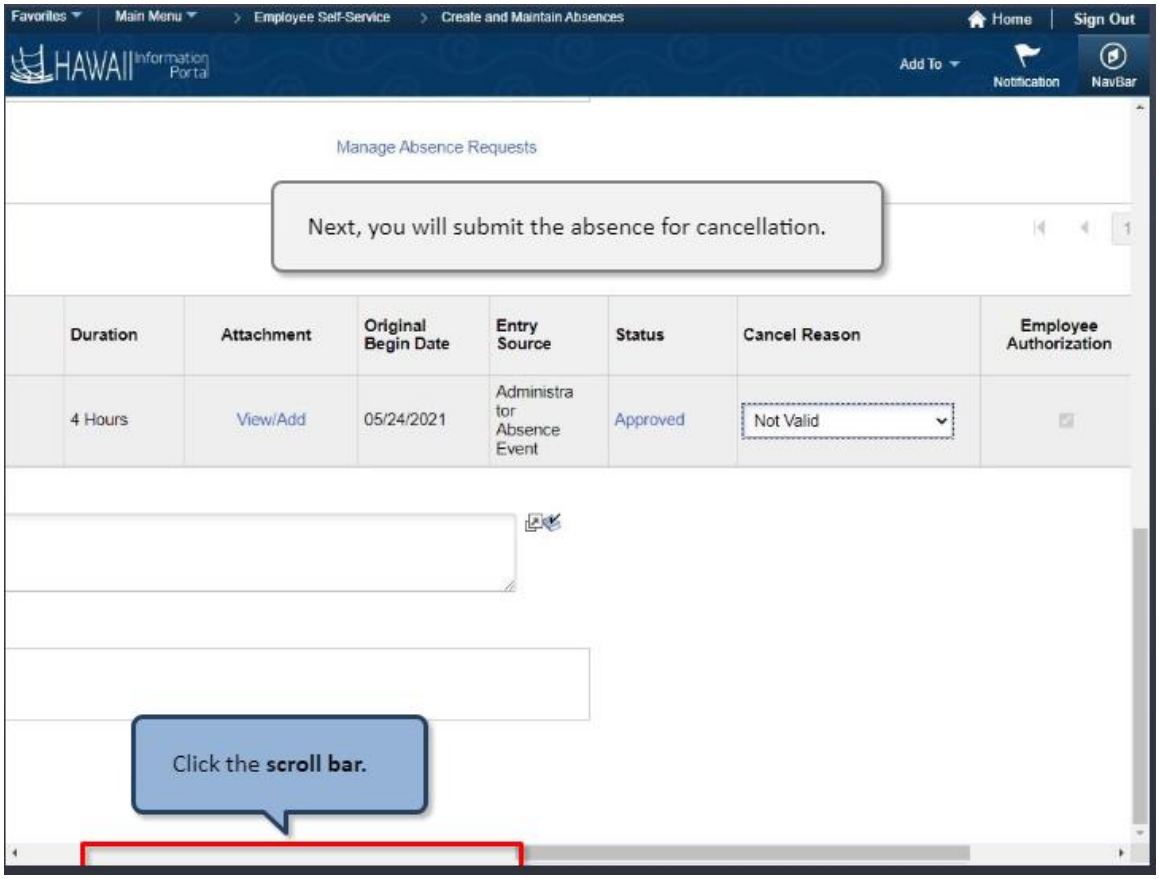


Canceling an absence requires a reason. Next, select a reason for the cancellation.

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

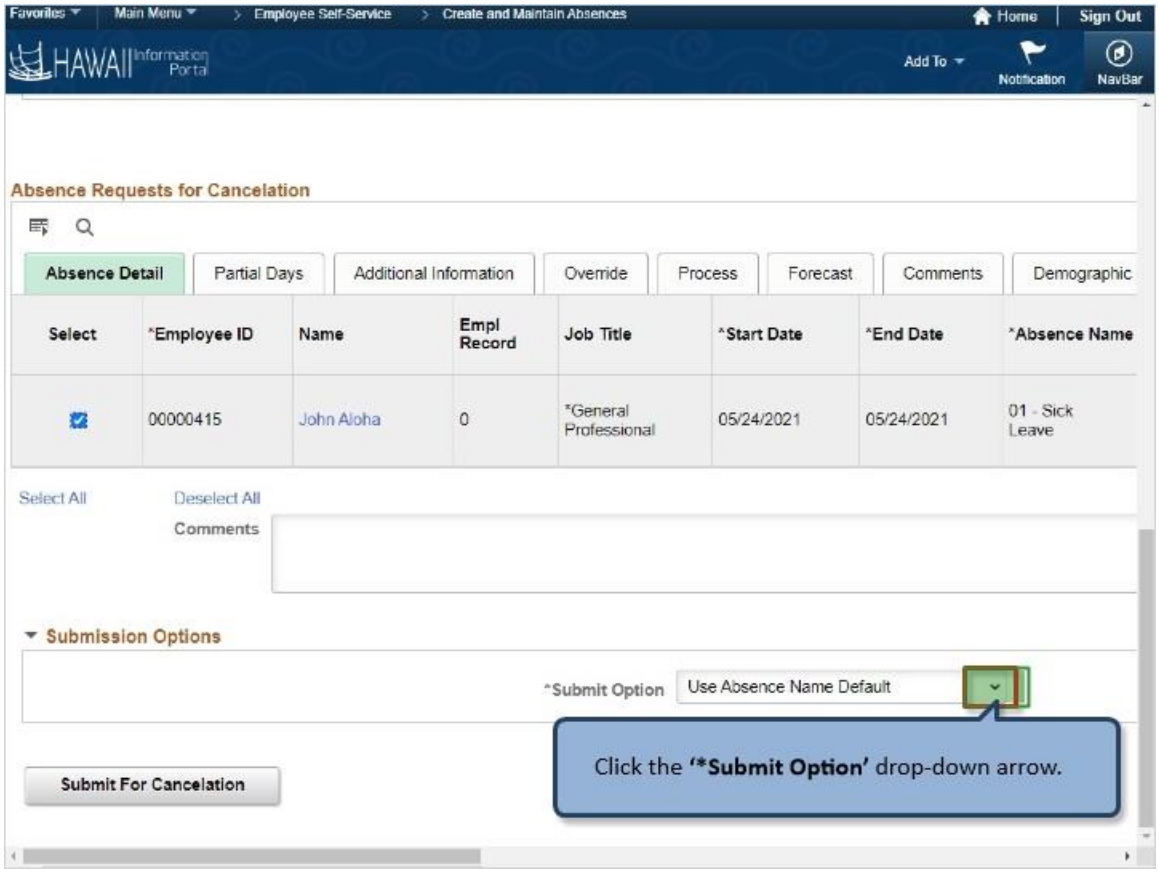


Select the **'Not Valid'** option.

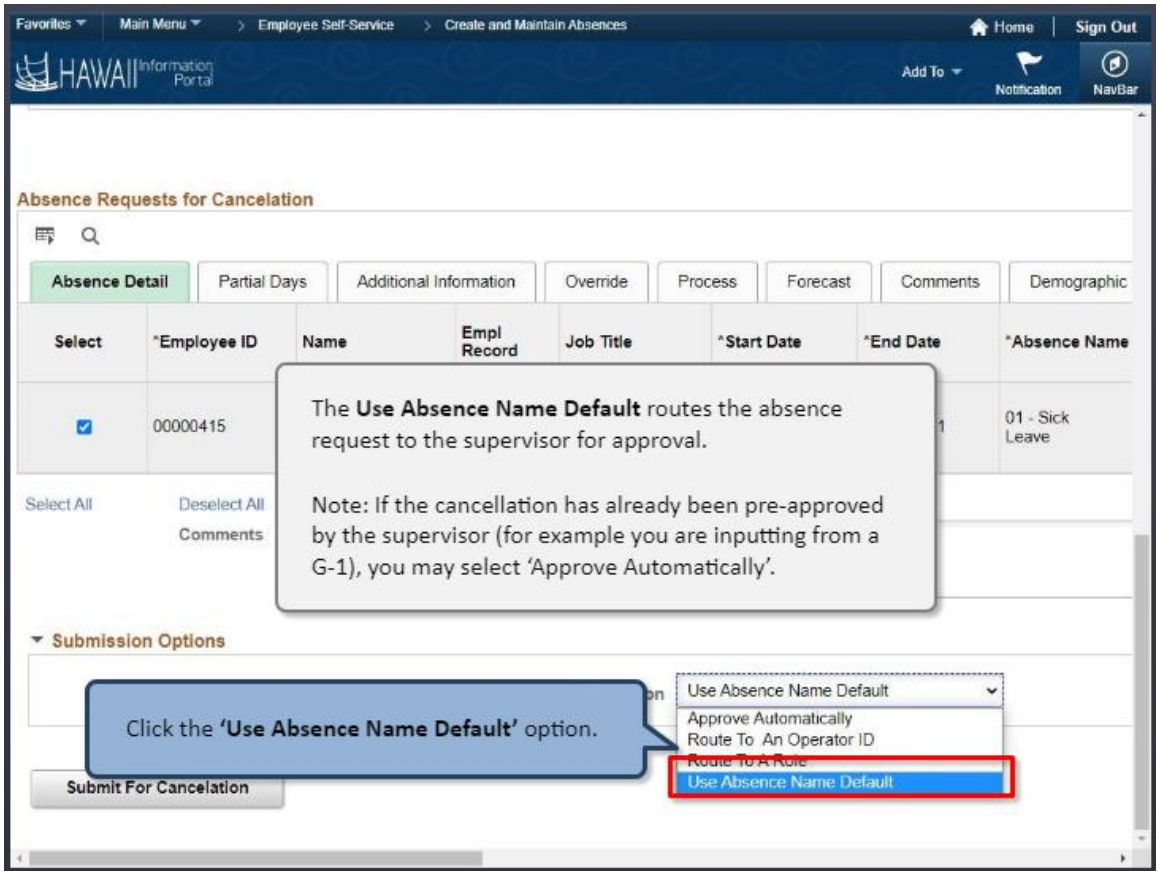


Next, you will submit the absence for cancellation.

Click the **scroll bar.**



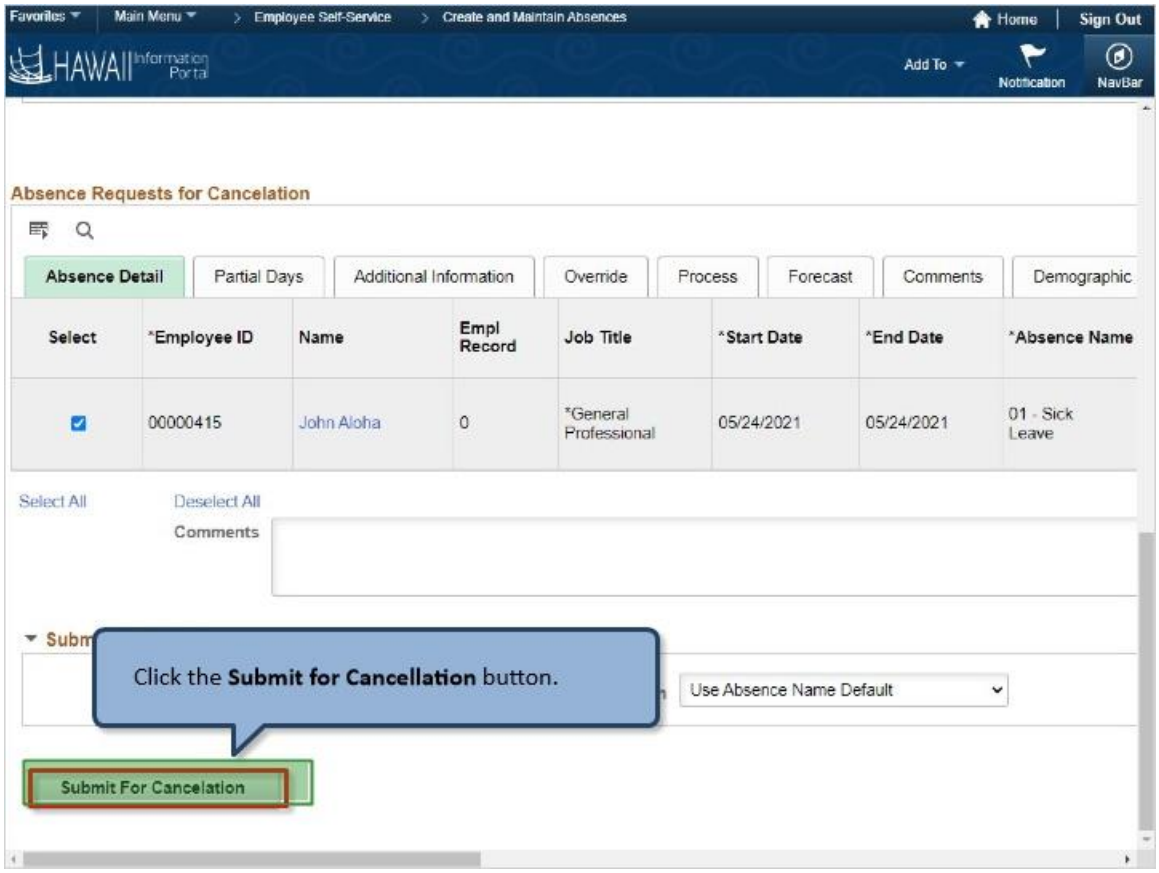
Click the **'*Submit Option'** drop-down arrow.



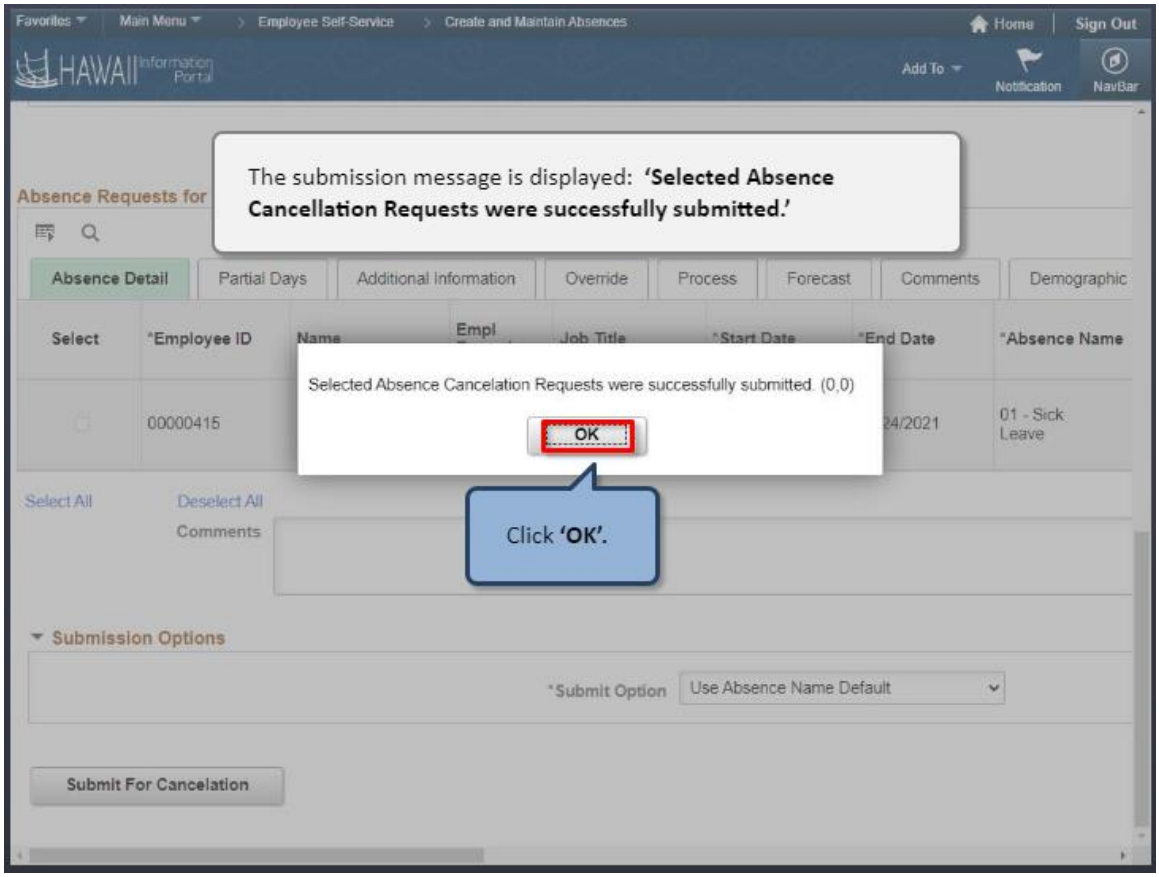
The **Use Absence Name Default** routes the absence request to the supervisor for approval.

Note: If the cancellation has already been pre-approved by the supervisor (for example you are inputting from a G-1), you may select 'Approve Automatically'.

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!

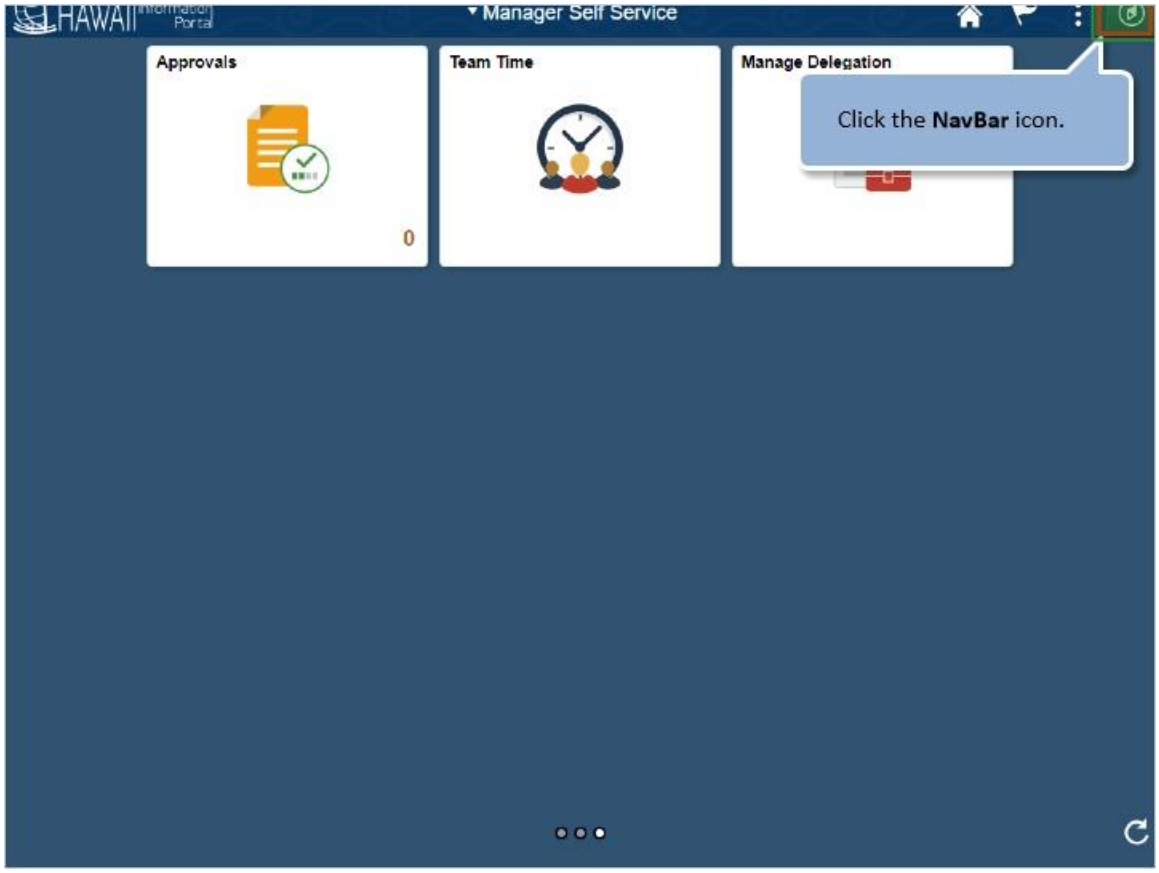
You've successfully completed this lesson.

INITIATE LEAVE DONATION REQUESTS

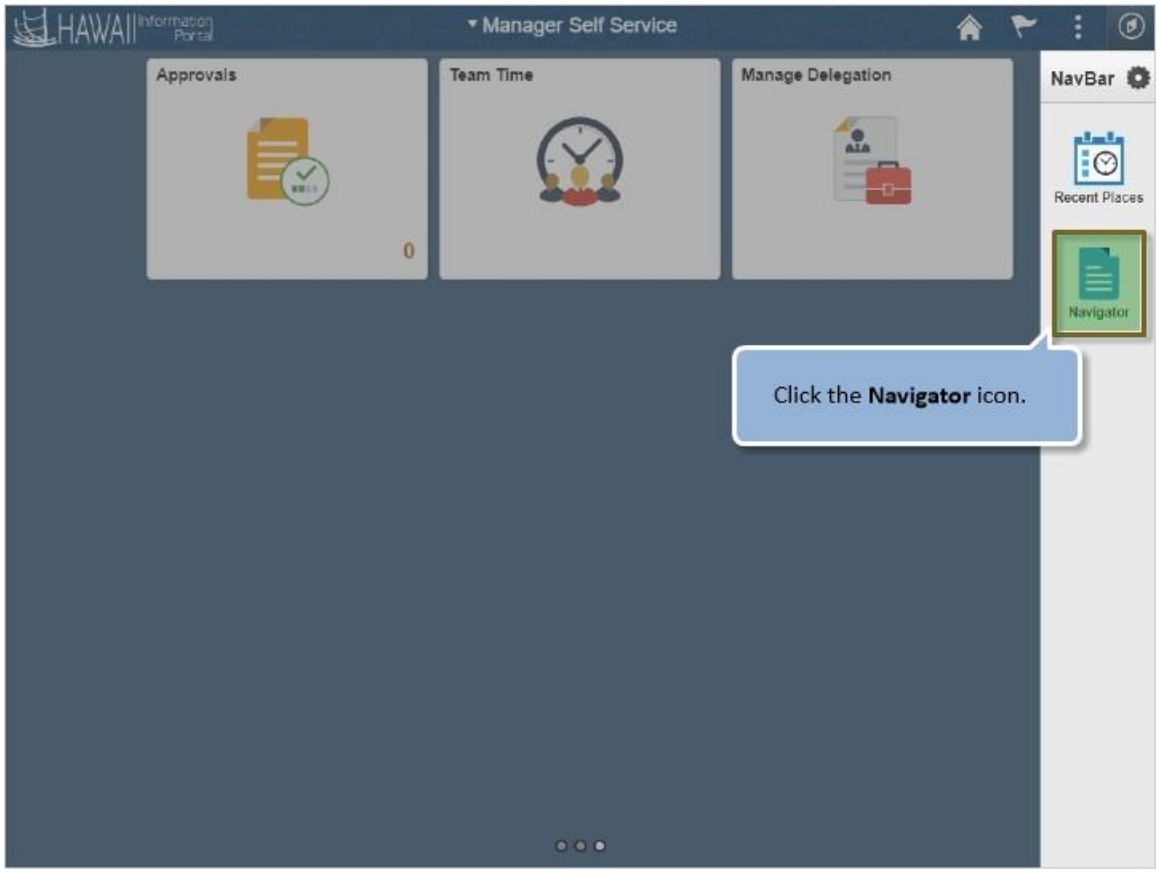
Lesson Scenario

In this lesson, you will learn how to initiate a leave donation request on behalf of an employee.

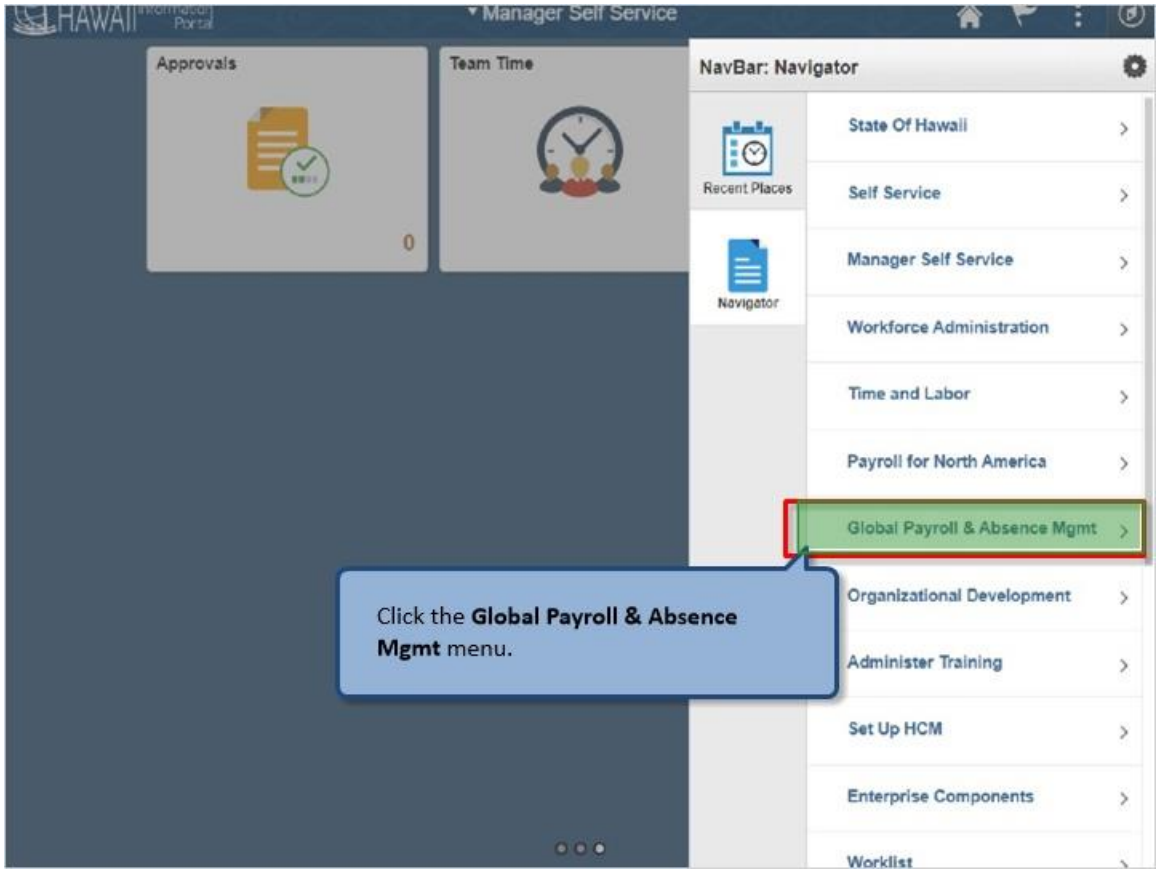
Employees have the ability to initiate leave donations for themselves however, an HR Admin may do so for an employee if need be.



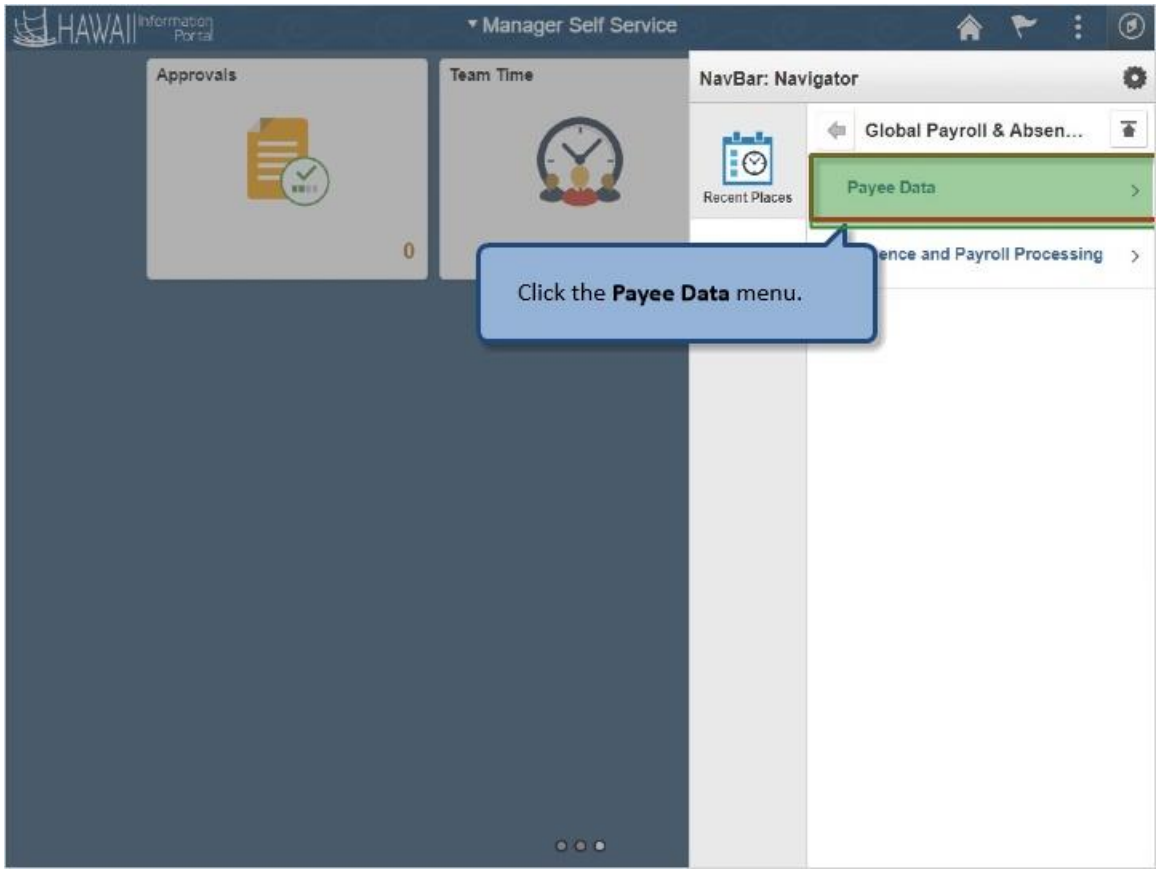
Click the **NavBar** icon.



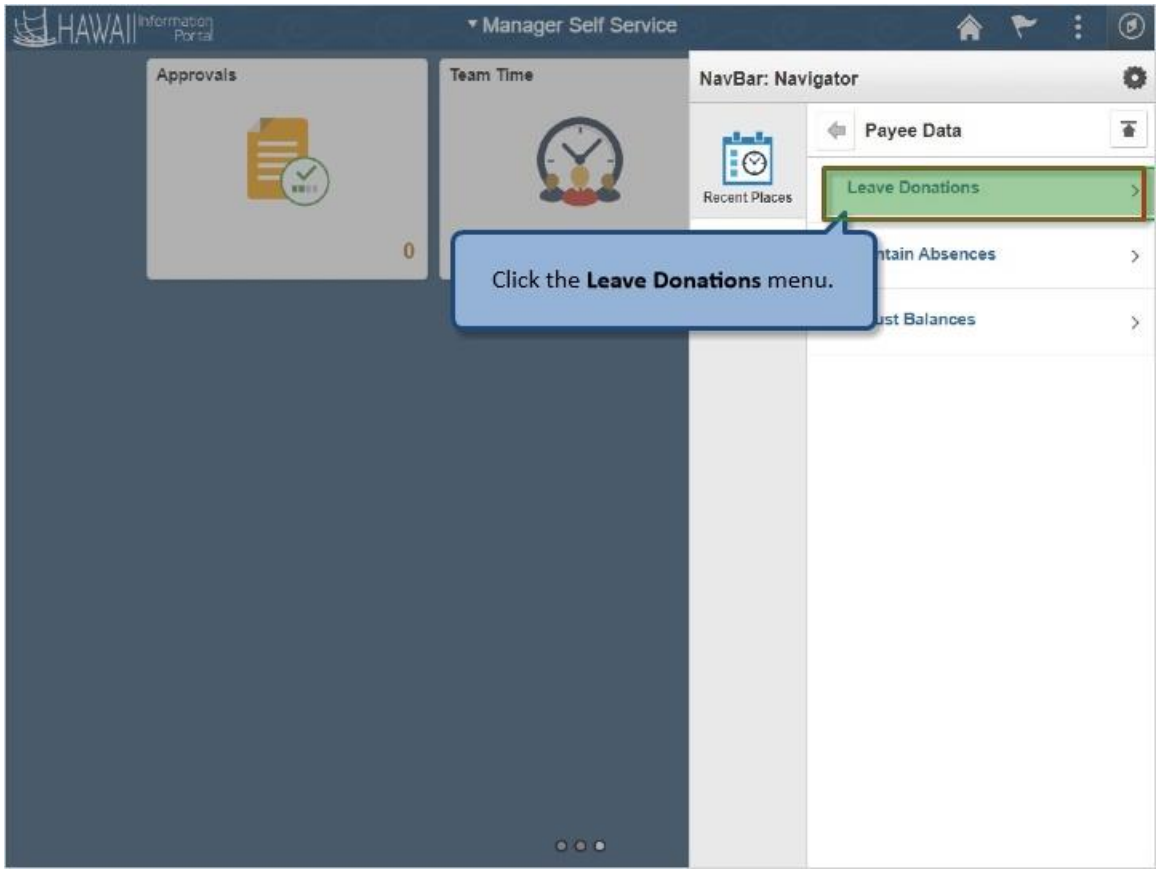
Click the **Navigator** icon.



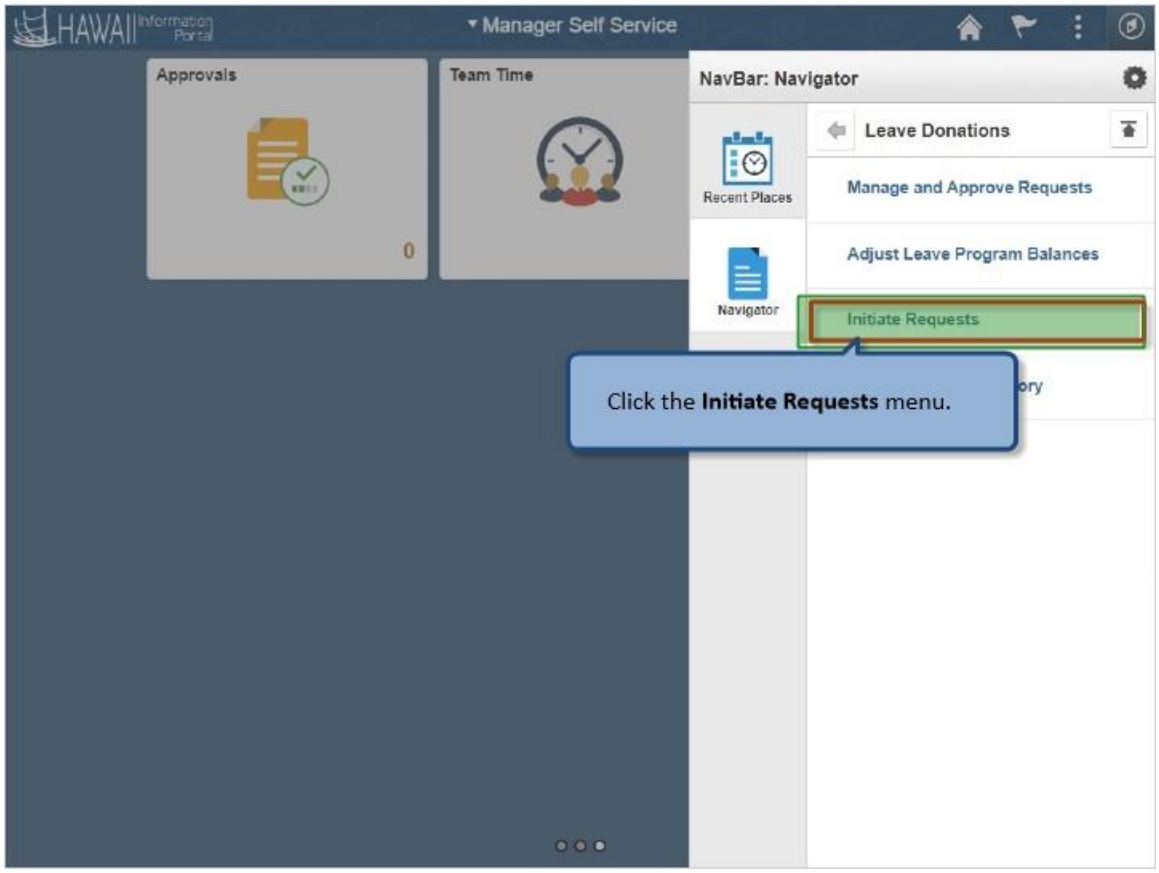
Click the **Global Payroll & Absence Mgmt** menu.



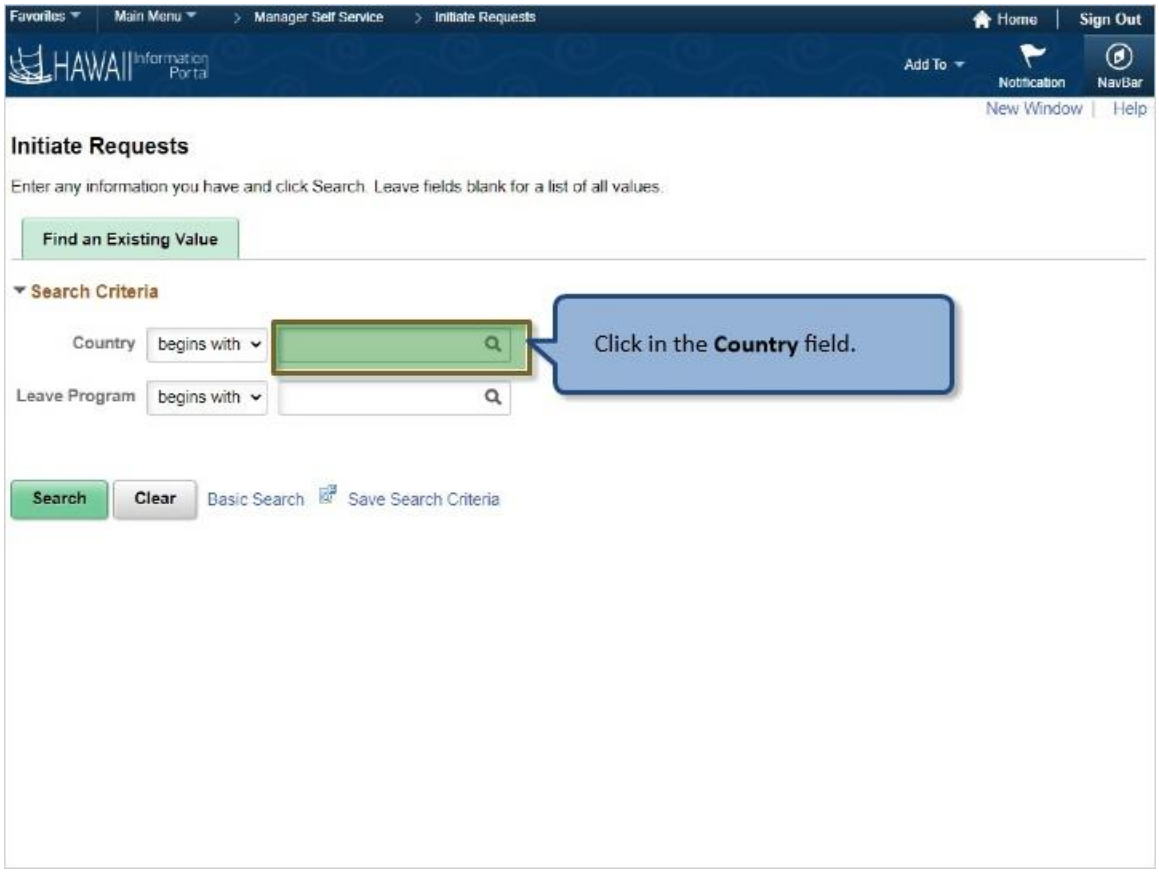
Click the **Payee Data** menu.



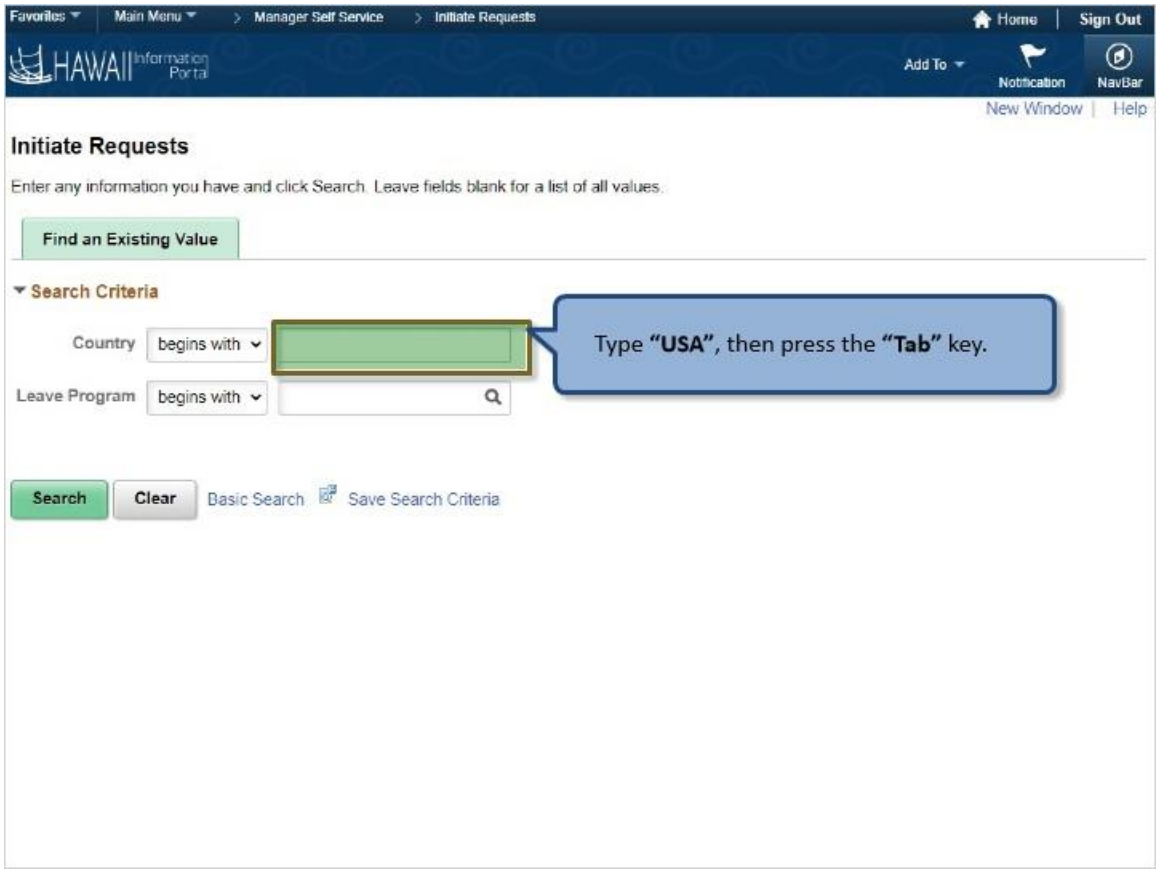
Click the **Leave Donations** menu.



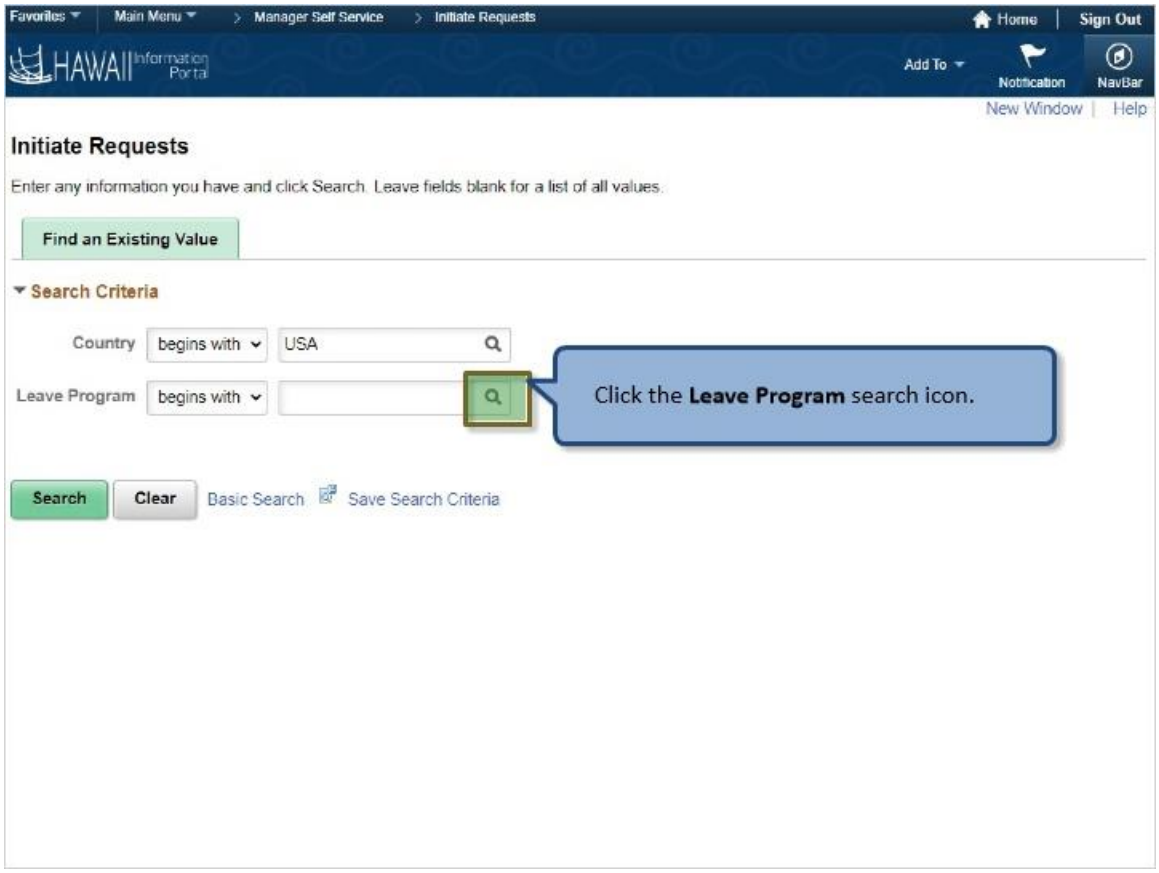
Click the **Initiate Requests** menu.



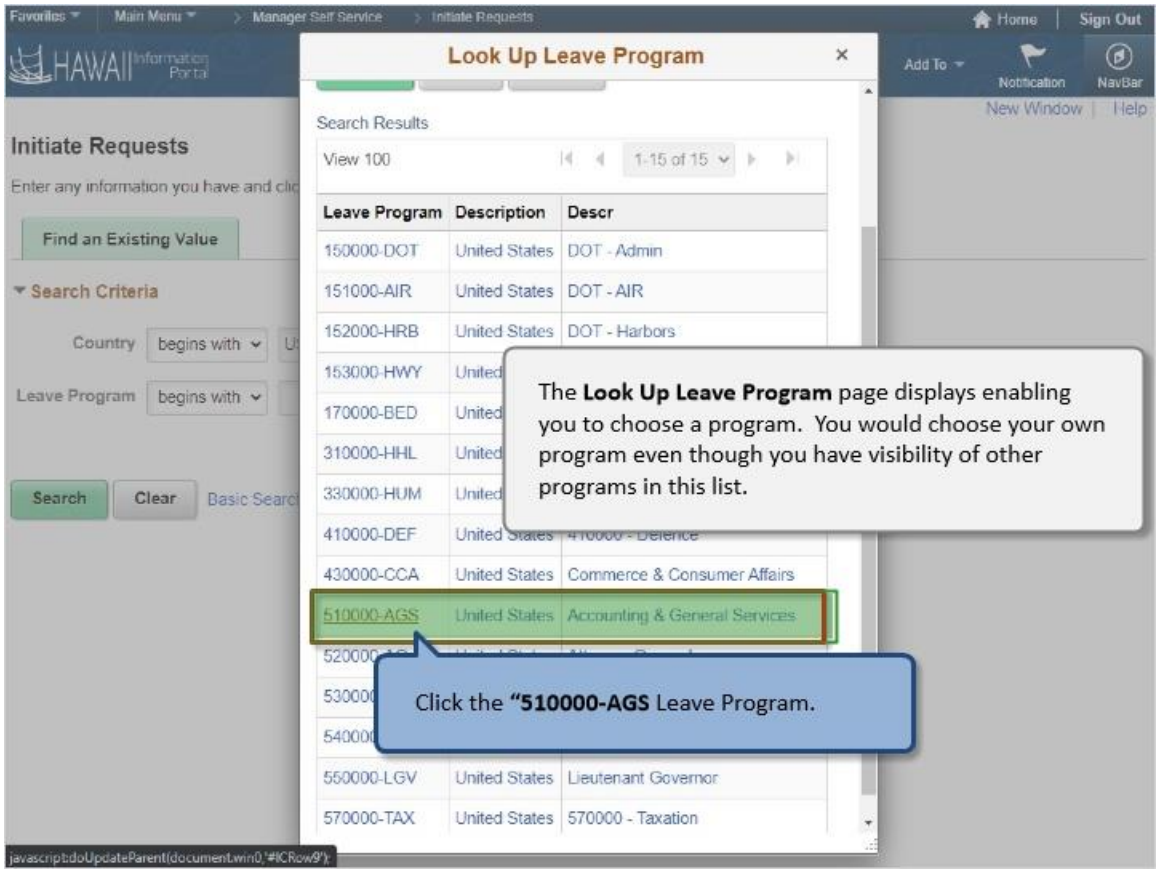
Click in the **Country** field.



Type **"USA",** then press the **"Tab"** key.

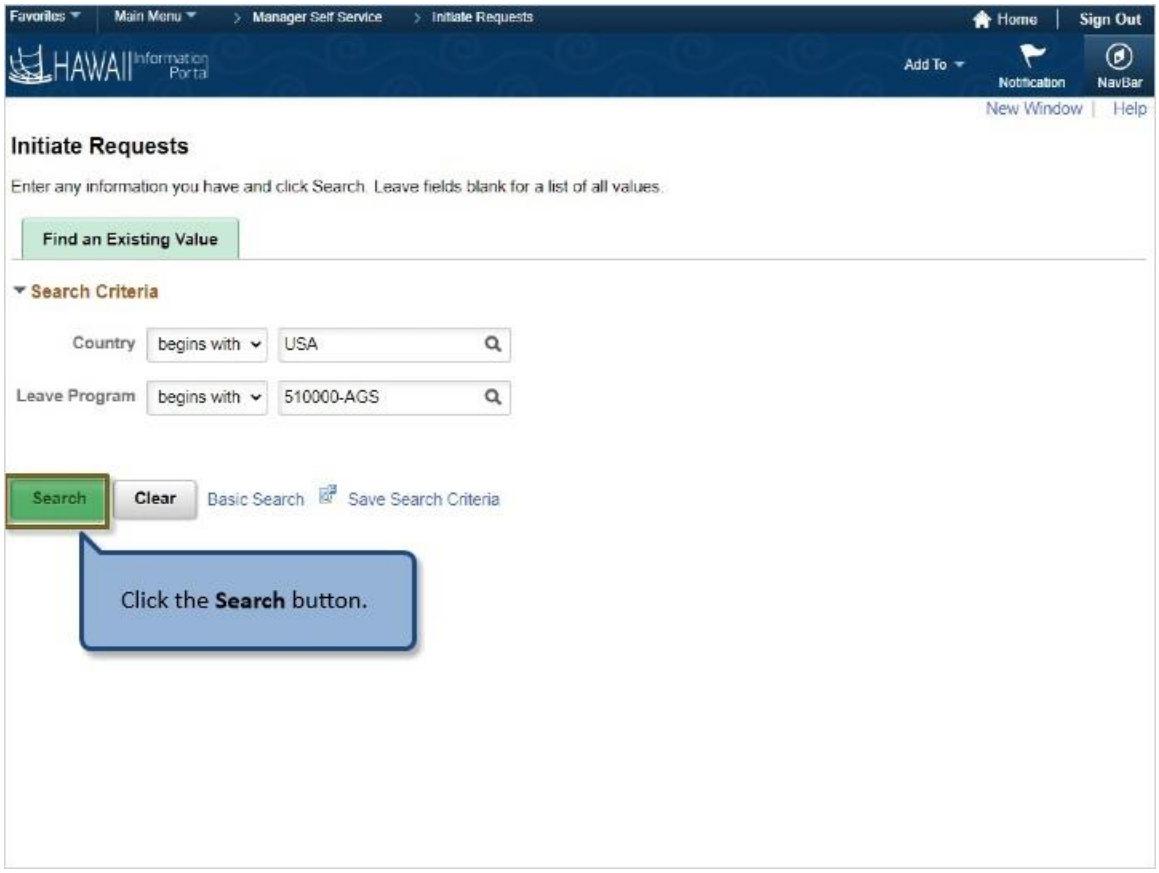


Click the **Leave Program** search icon.

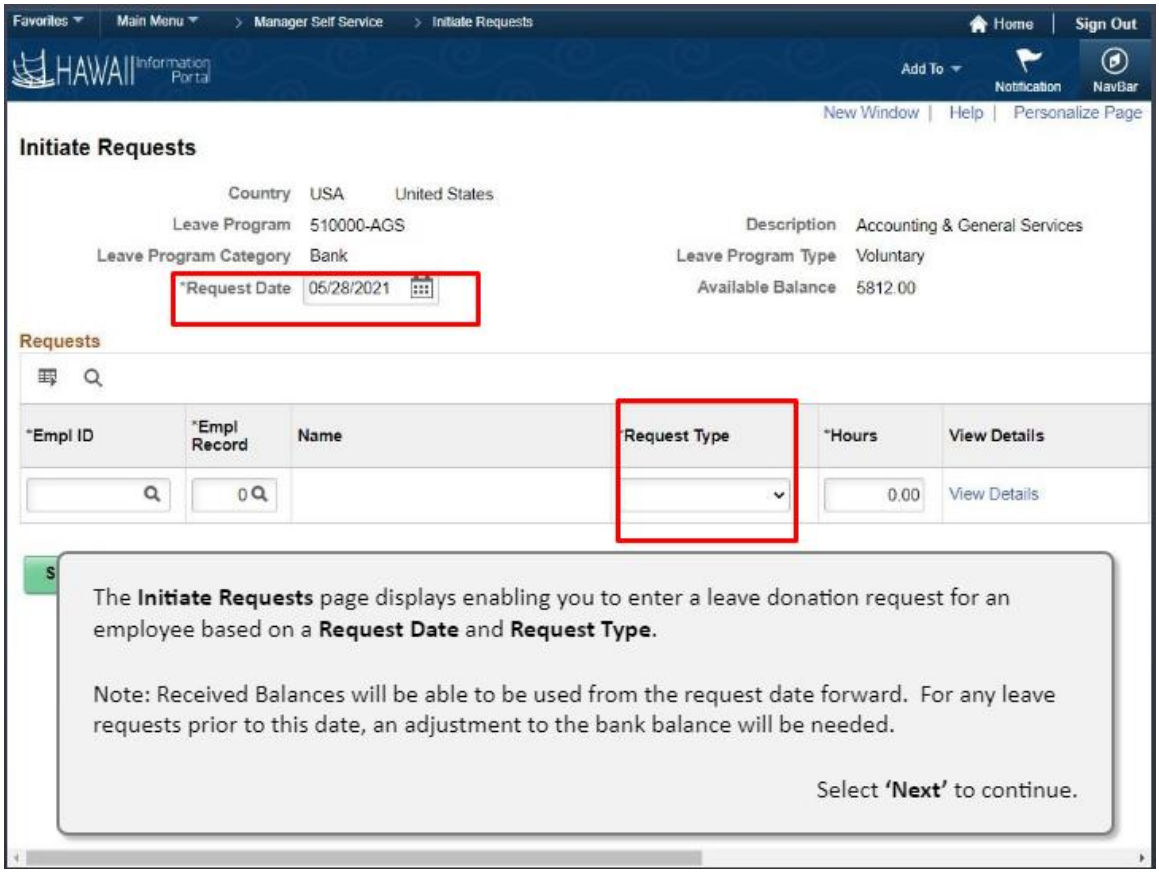


The **Look Up Leave Program** page displays enabling you to choose a program. You would choose your own program even though you have visibility of other programs in this list.

Click the **"510000-AGS** Leave Program.

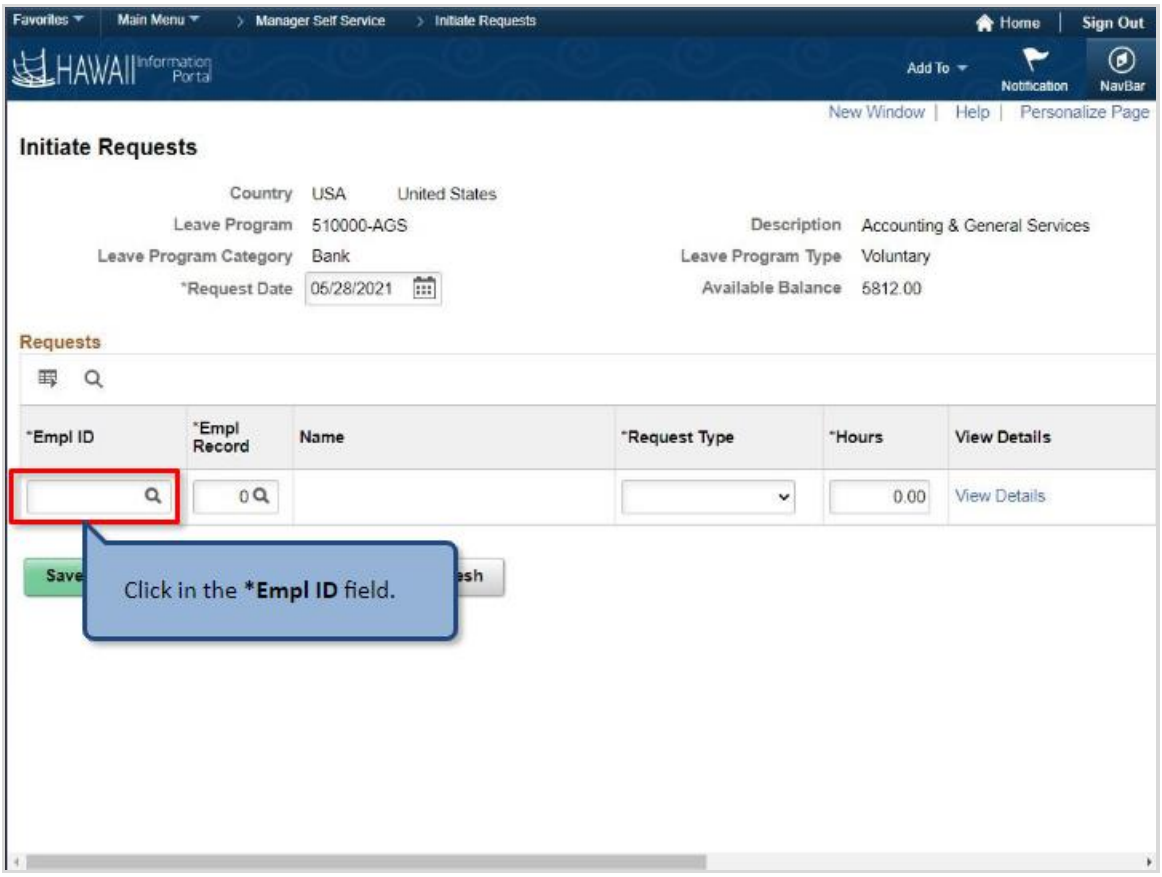


Click the **Search** button.

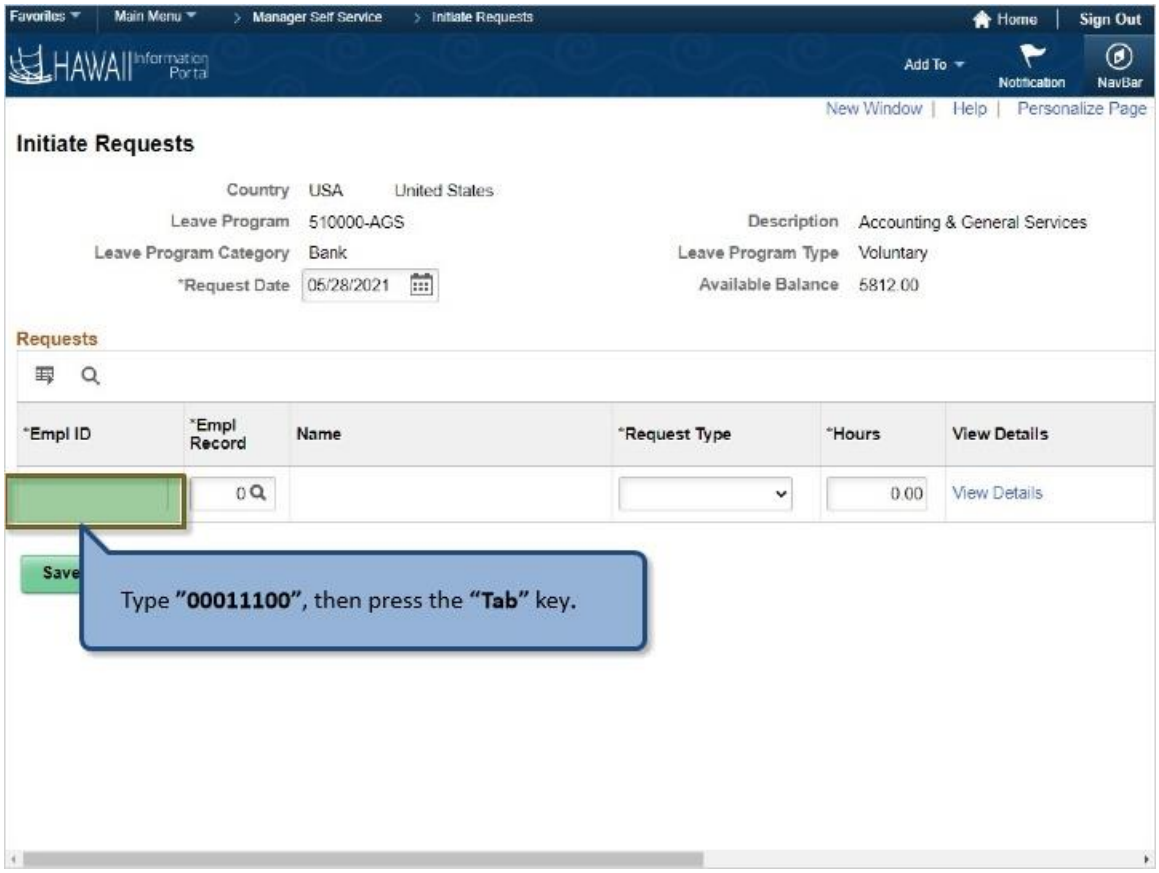


The **Initiate Requests** page displays enabling you to enter a leave donation request for an employee based on a **Request Date** and **Request Type**.

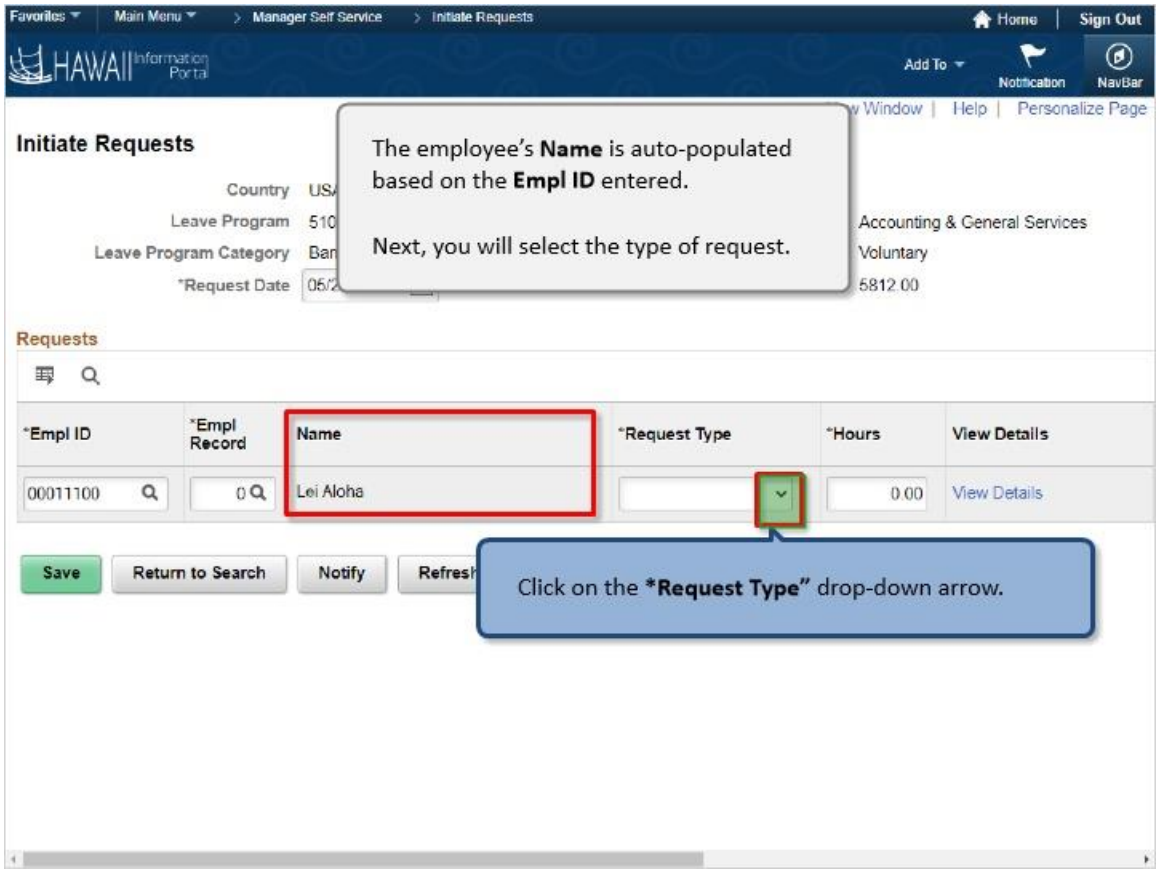
Note: Received Balances will be able to be used from the request date forward. For any leave requests prior to this date, an adjustment to the bank balance will be needed.



Click in the ***Empl ID*** field.



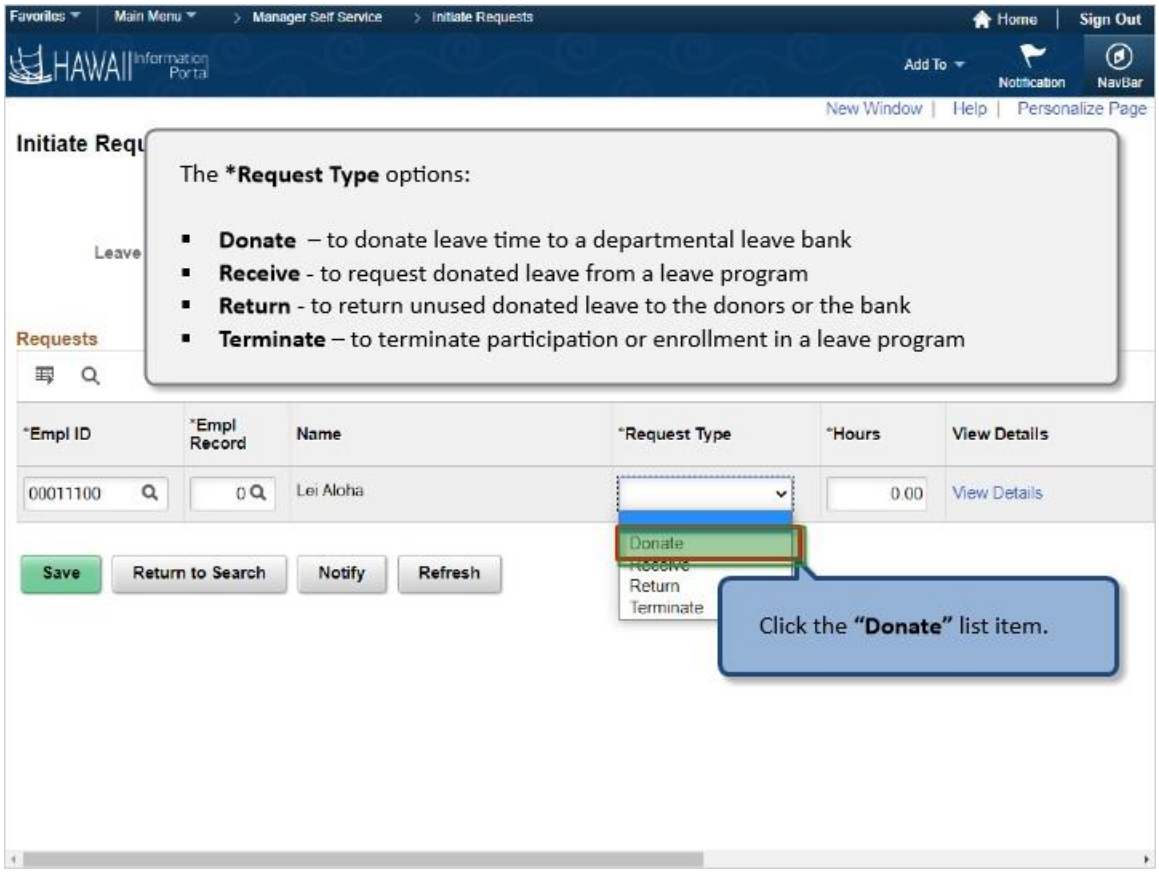
Type **"00011100"**, then press the **"Tab"** key**.**



The employee's **Name** is auto-populated based on the **Empl ID** entered.

Next, you will select the type of request.

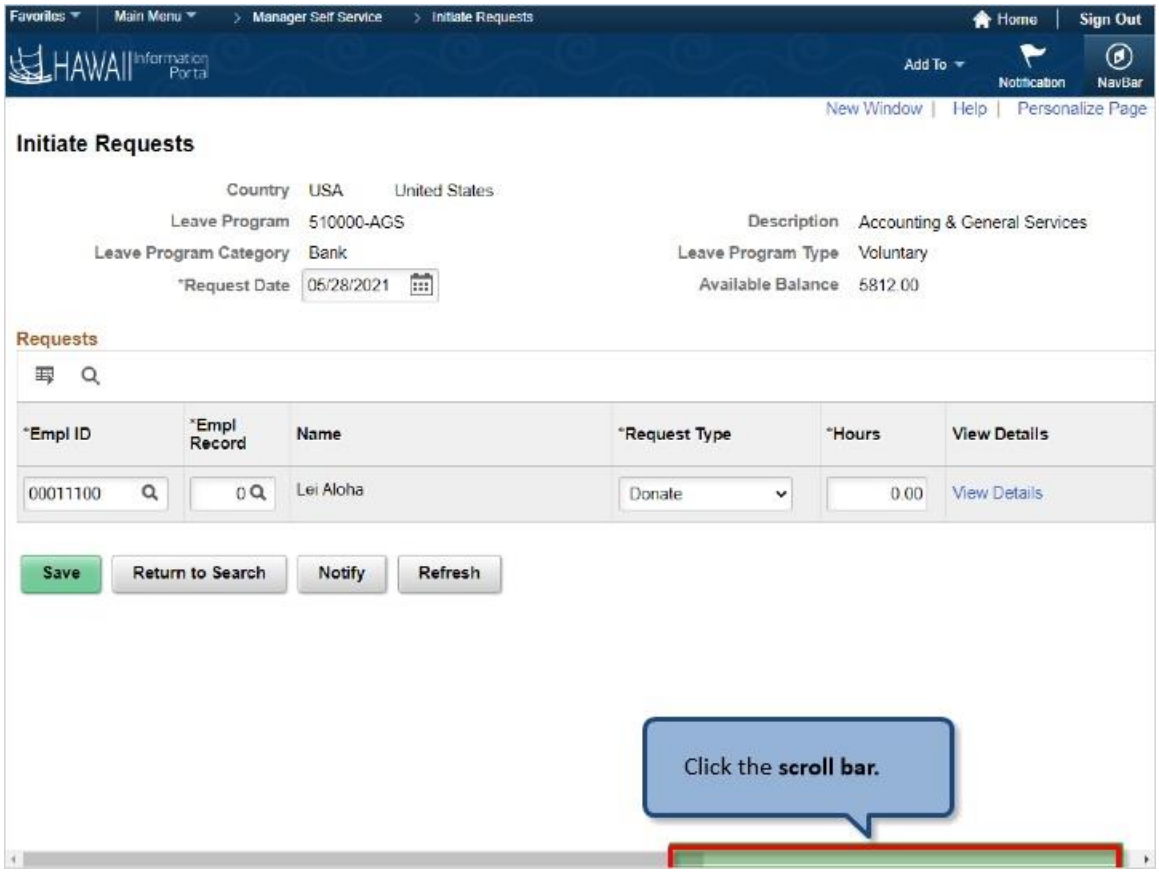
Click on the ***Request Type"** drop-down arrow.



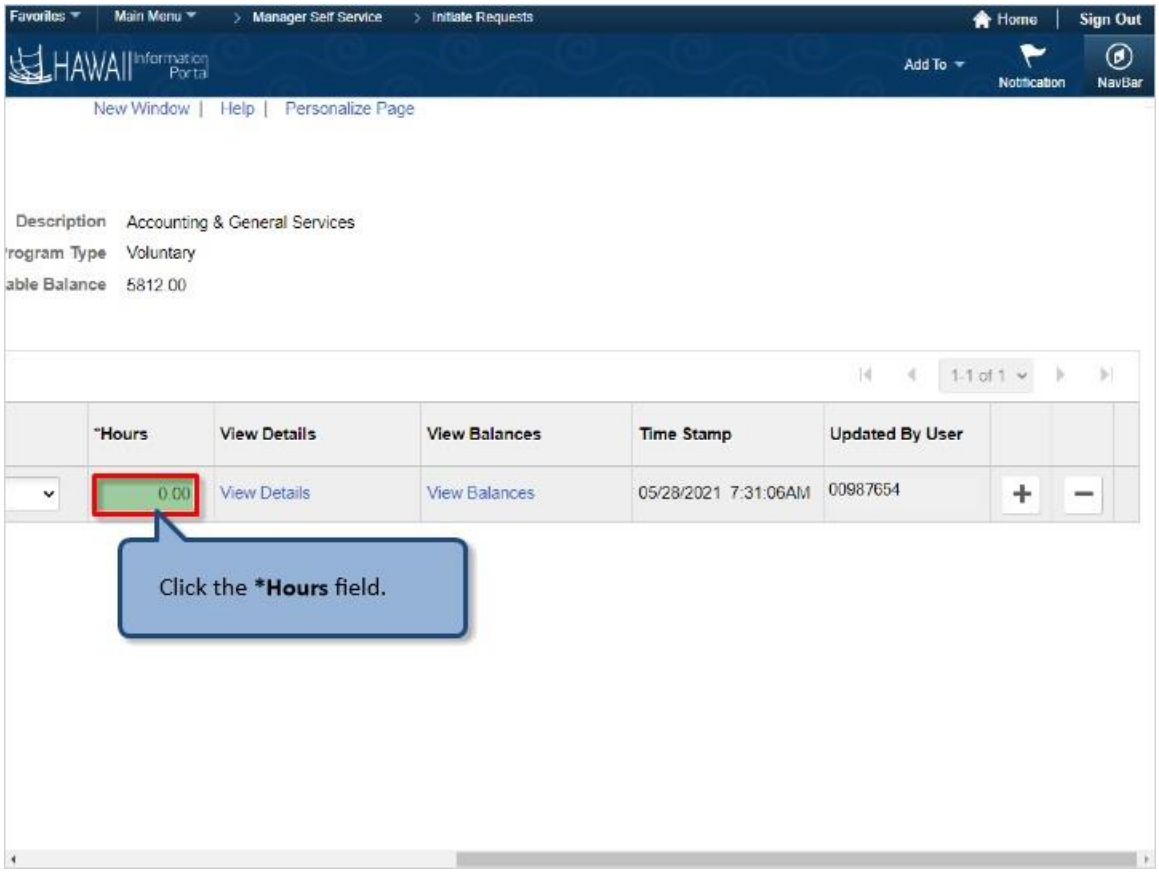
The ***Request Type** options:

- **Donate** - to donate leave time to a departmental leave bank
- **Receive** - to request donated leave from a leave program
- **Return** - to return unused donated leave to the donors or the bank
- **Terminate** - to terminate participation or enrollment in a leave program

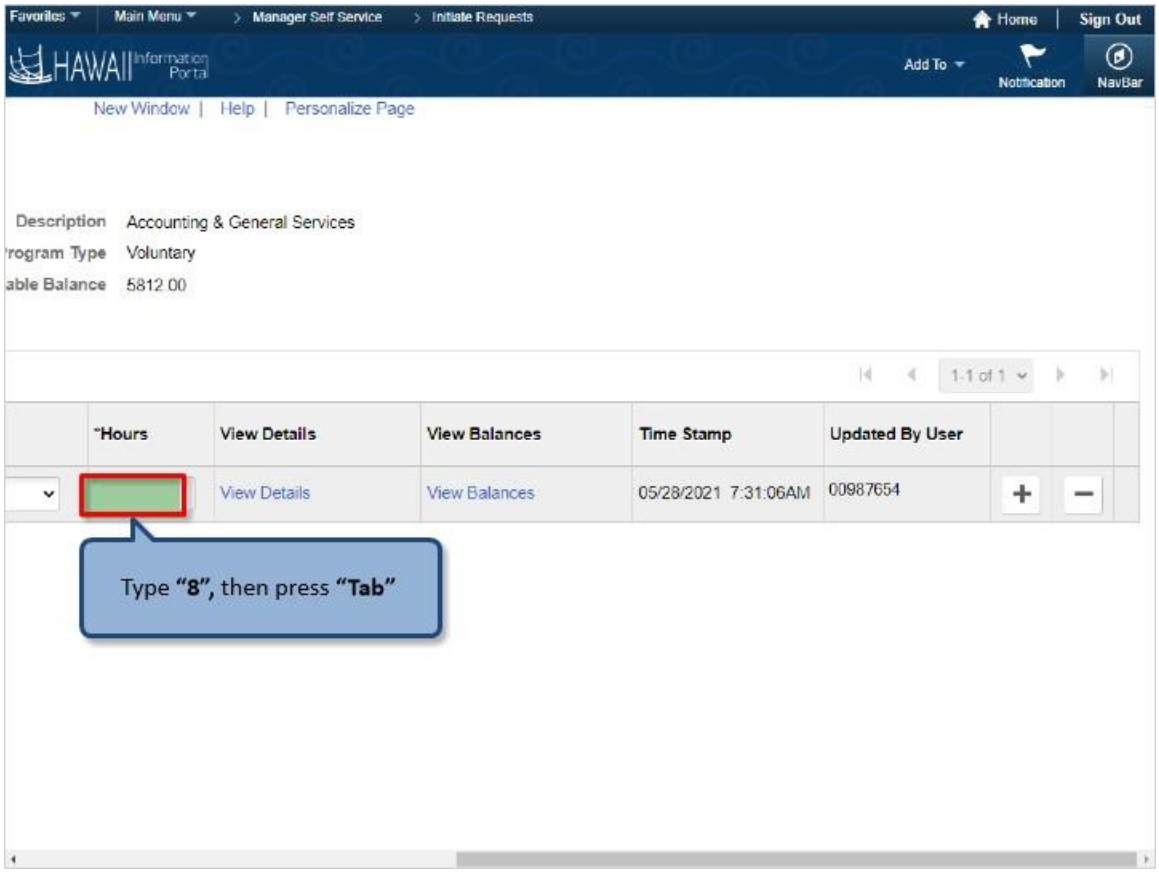
Click the **"Donate"** list item.



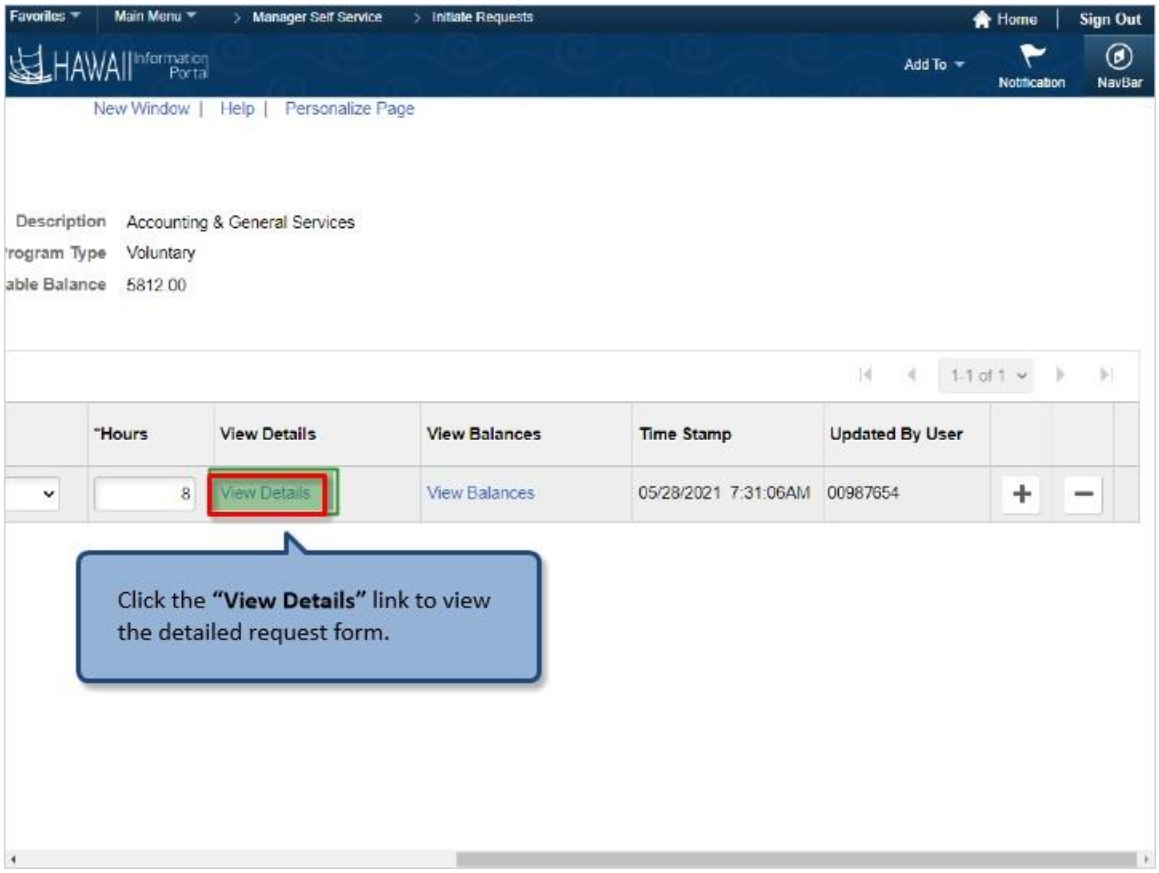
Click the **scroll bar**.



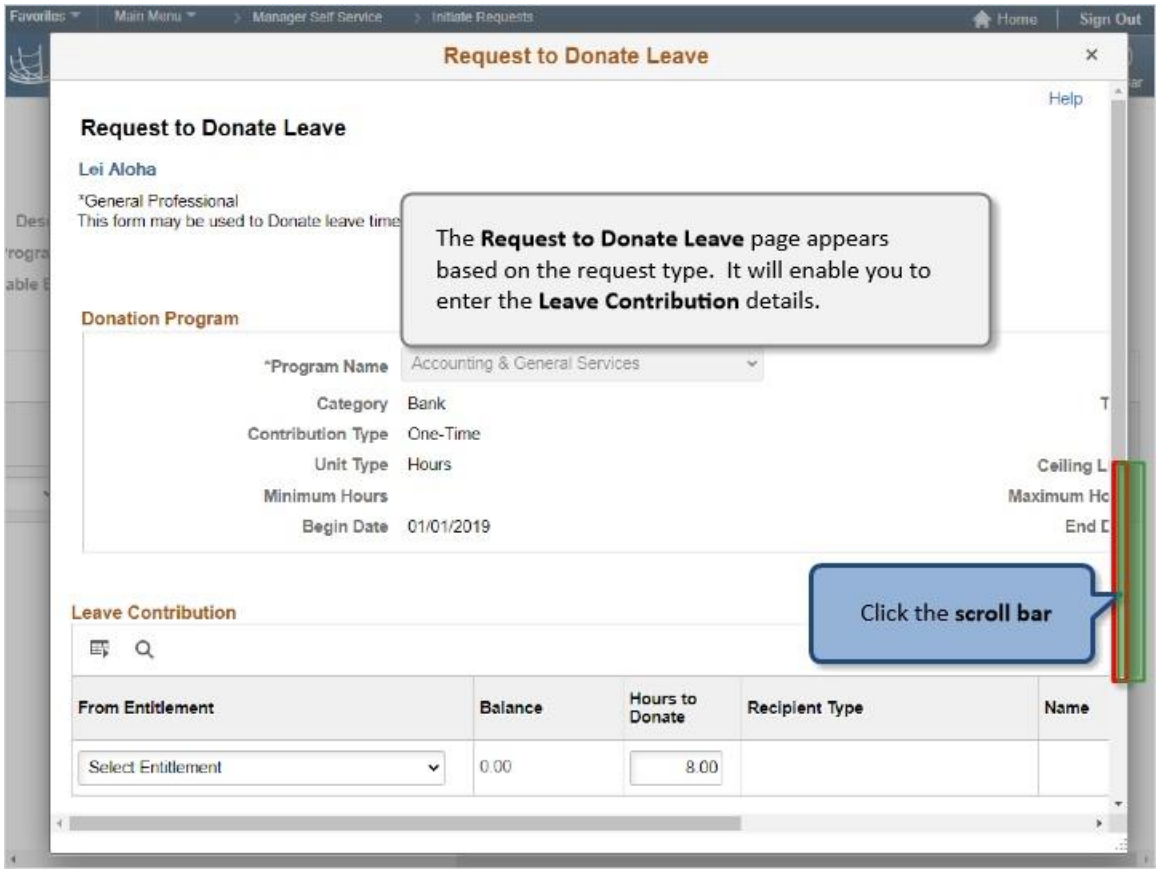
Click the ***Hours** field.



Type **"8",** then press **"Tab"**

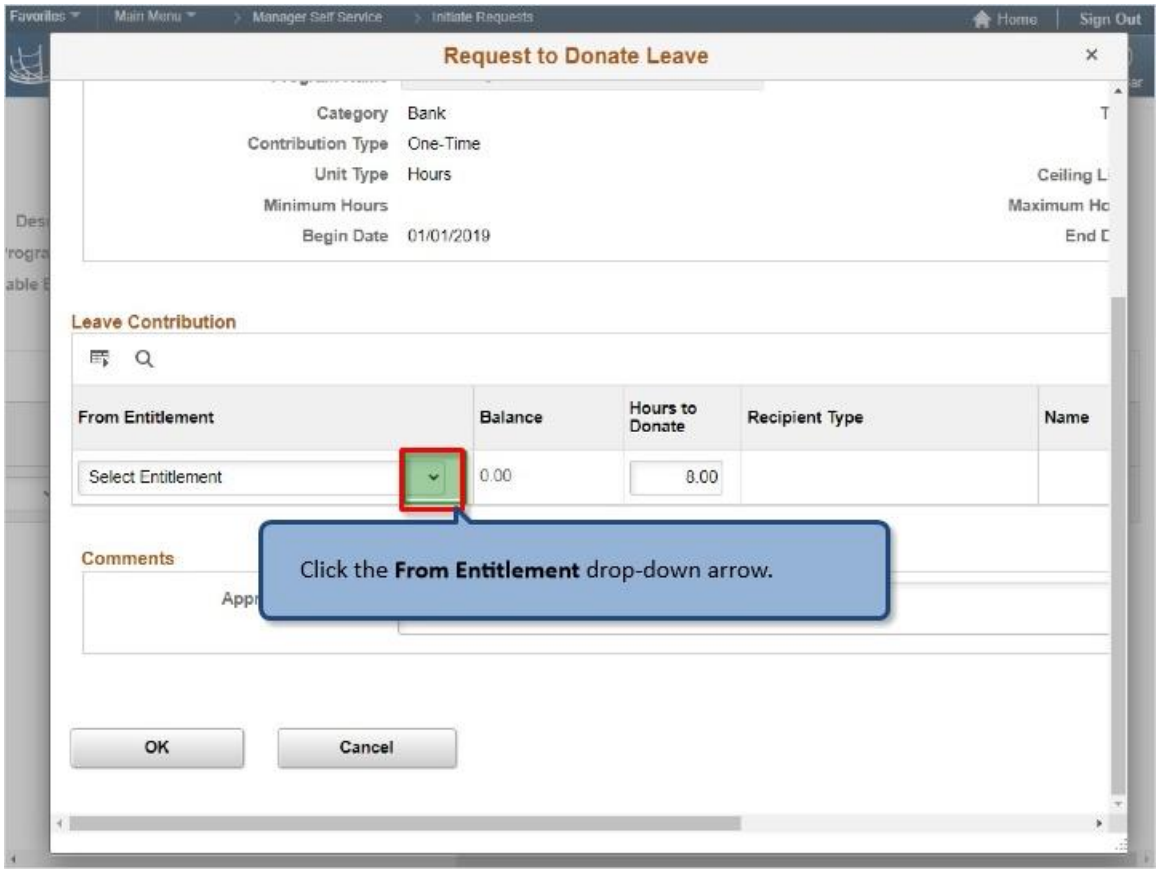


Click the **"View Details"** link to view the detailed request form.

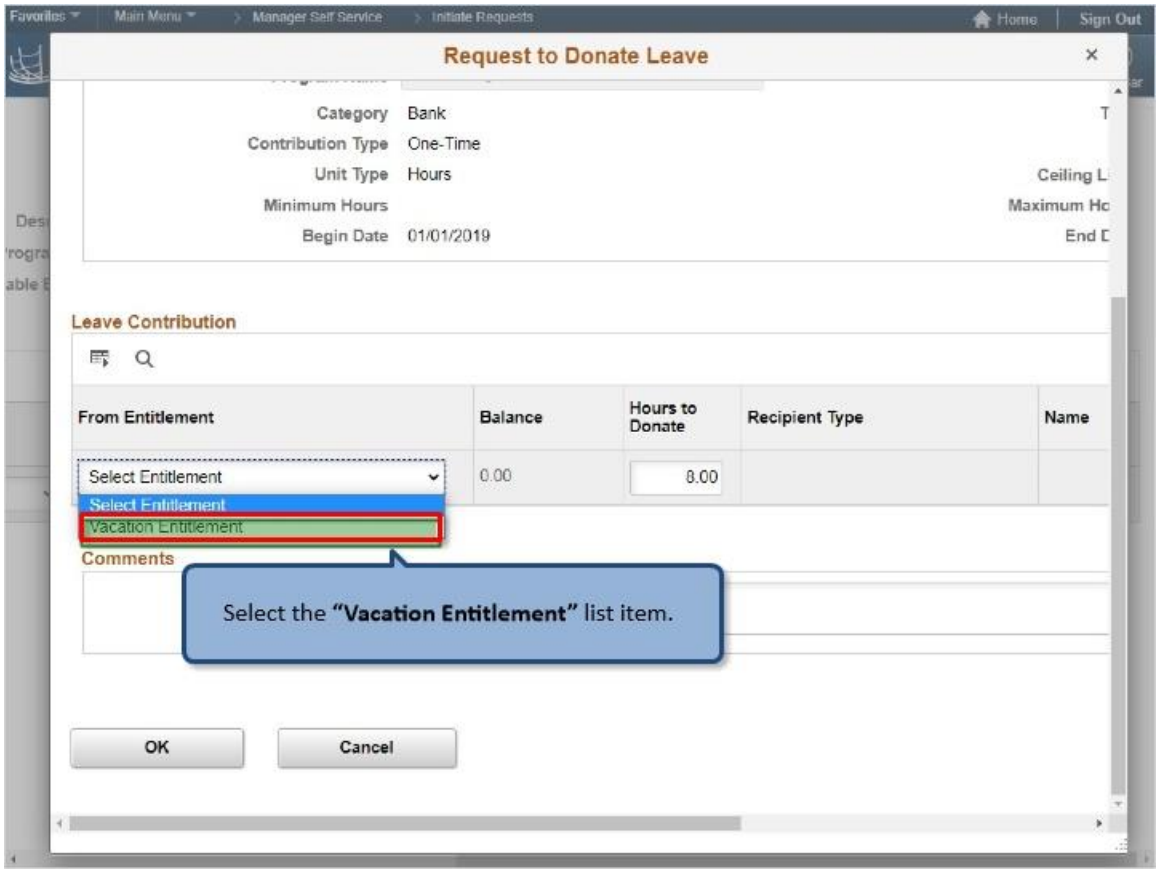


The Request to Donate Leave page appears based on the request type. It will enable you to enter the Leave Contribution details.

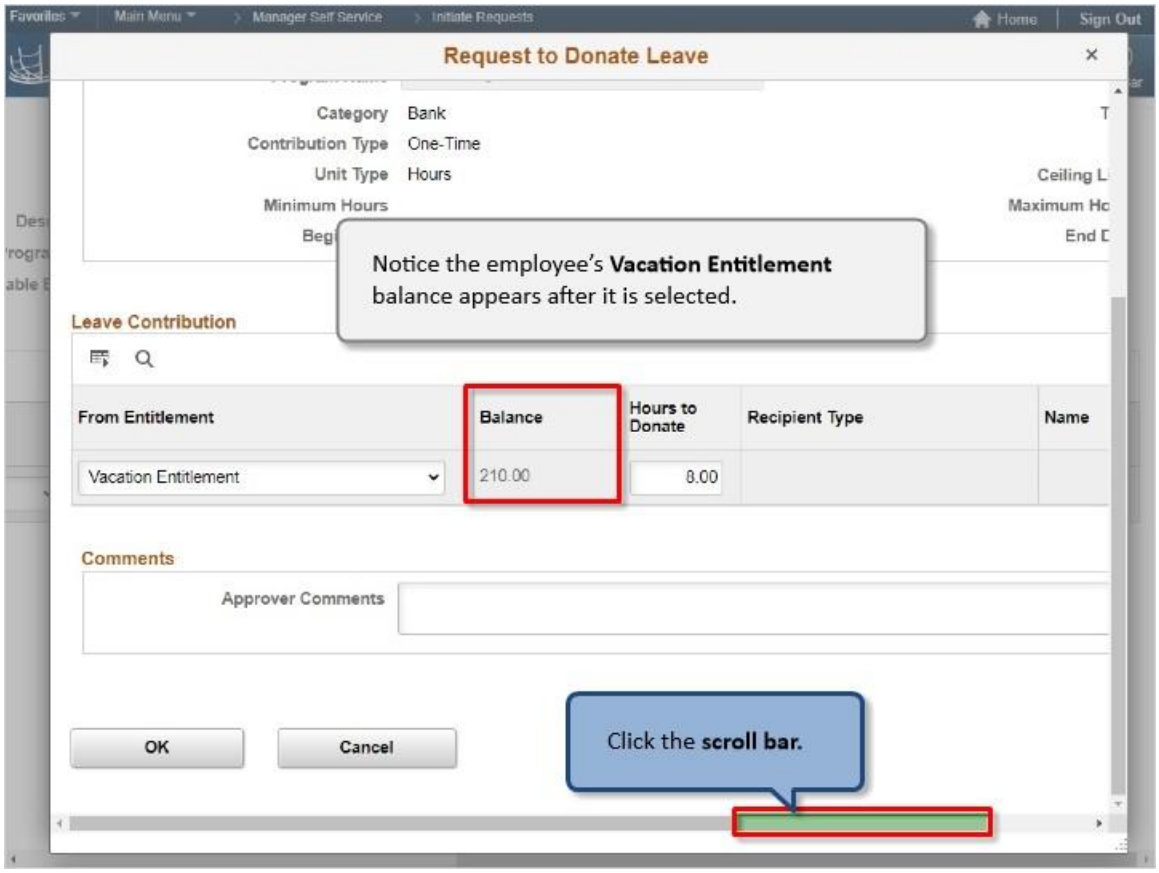
Click the **scroll bar**



Click the **From Entitlement** drop-down arrow.

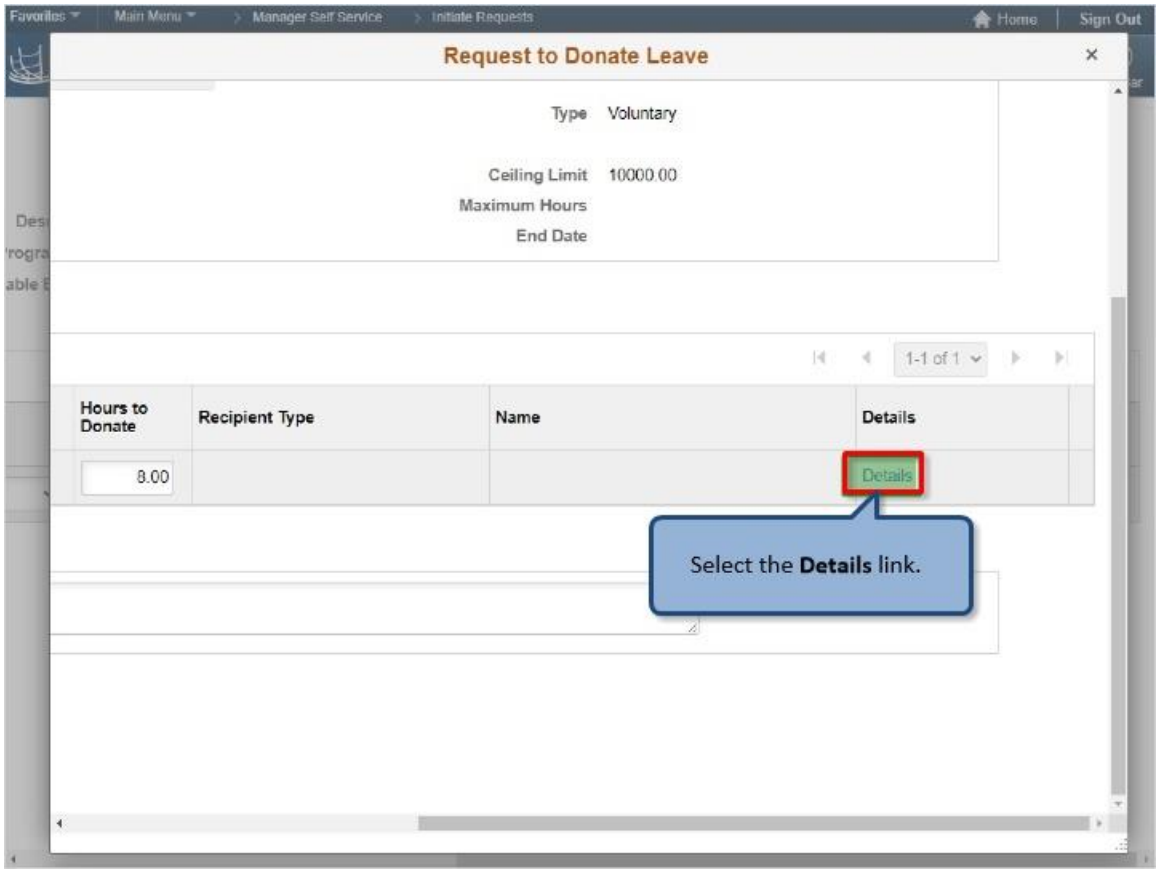


Select the **"Vacation Entitlement"** list item.

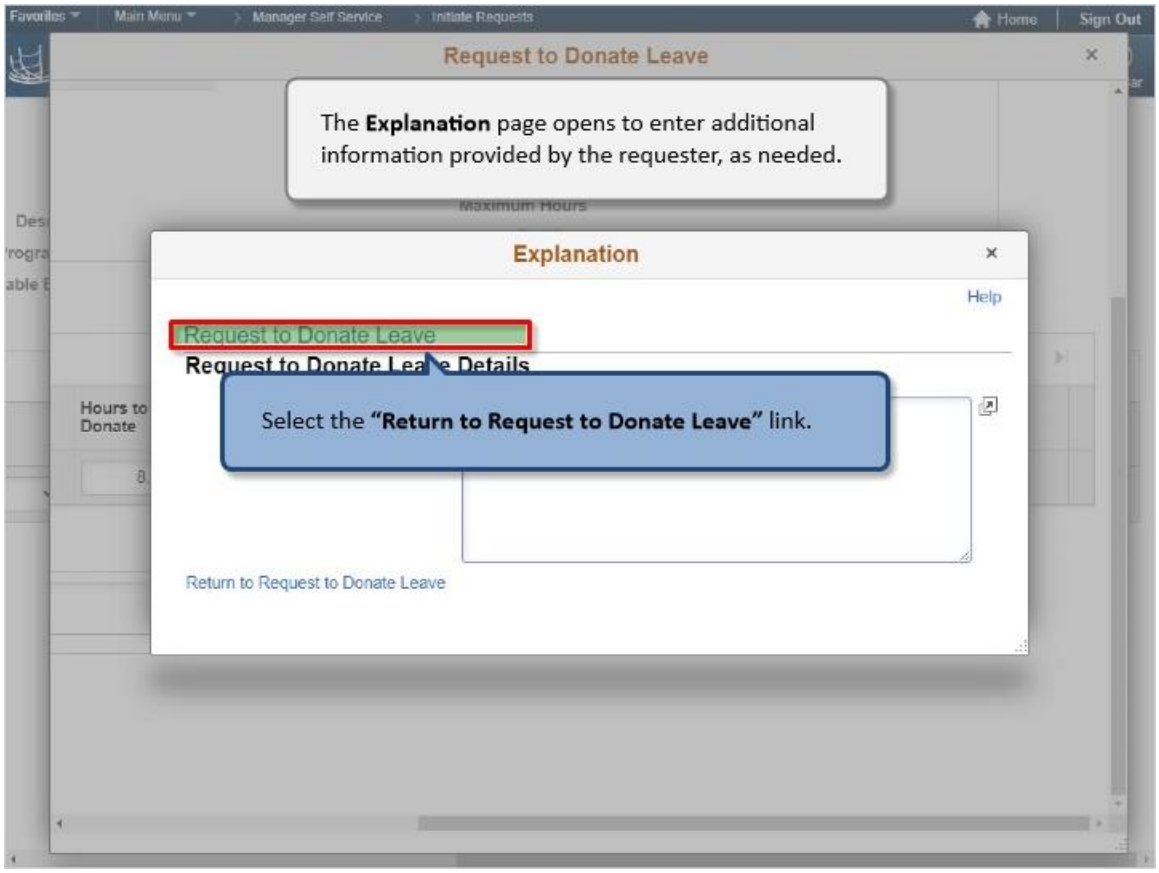


Notice the employee's **Vacation Entitlement** balance appears after it is selected.

Click the **scroll bar.**

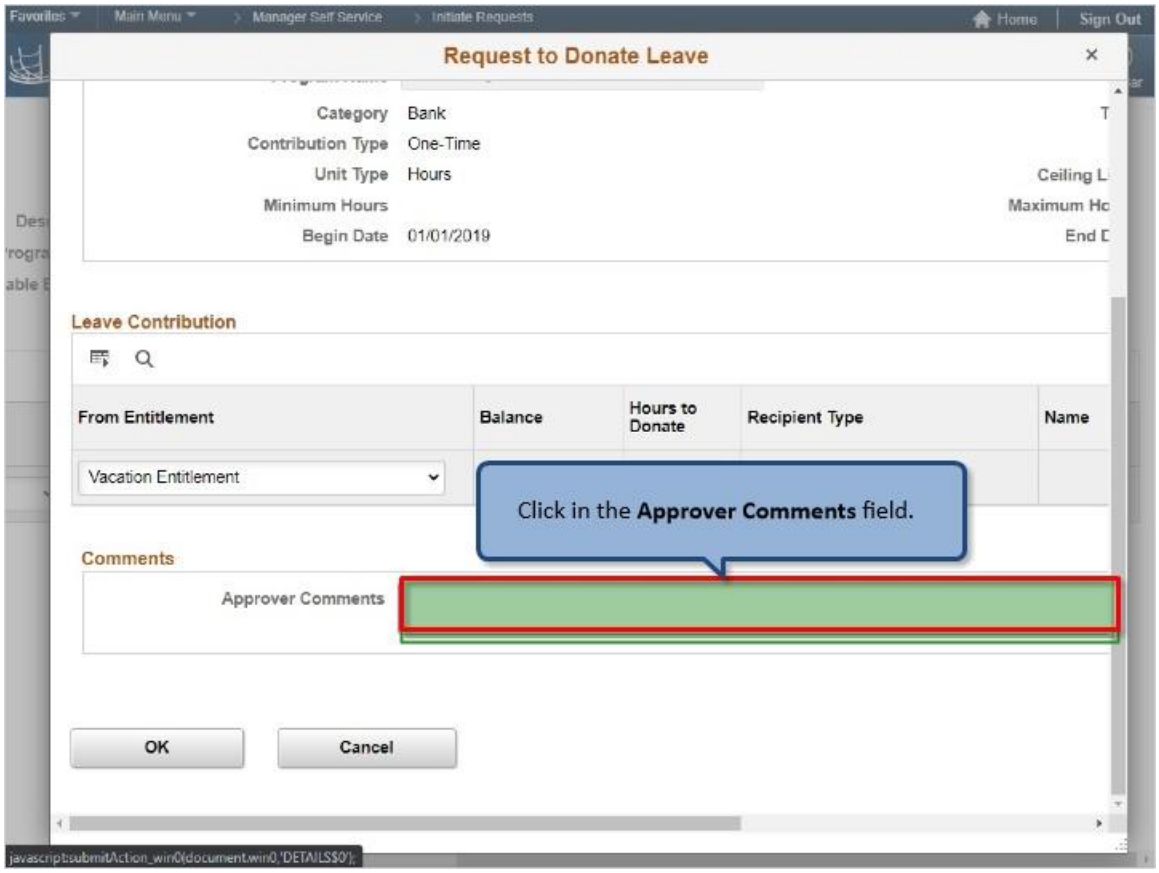


Select the **Details** link.

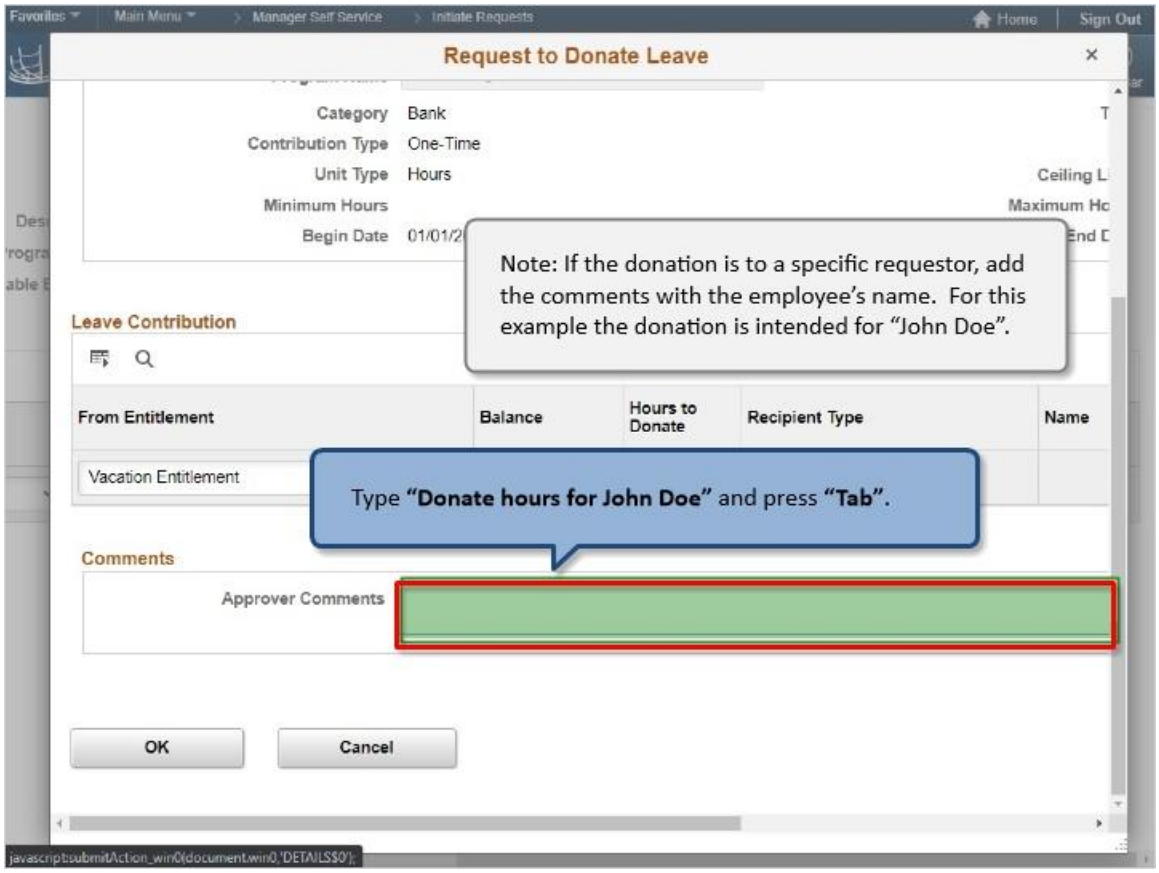


The **Explanation** page opens to enter additional information provided by the requester, as needed.

Select the **"Return to Request to Donate Leave"** link.

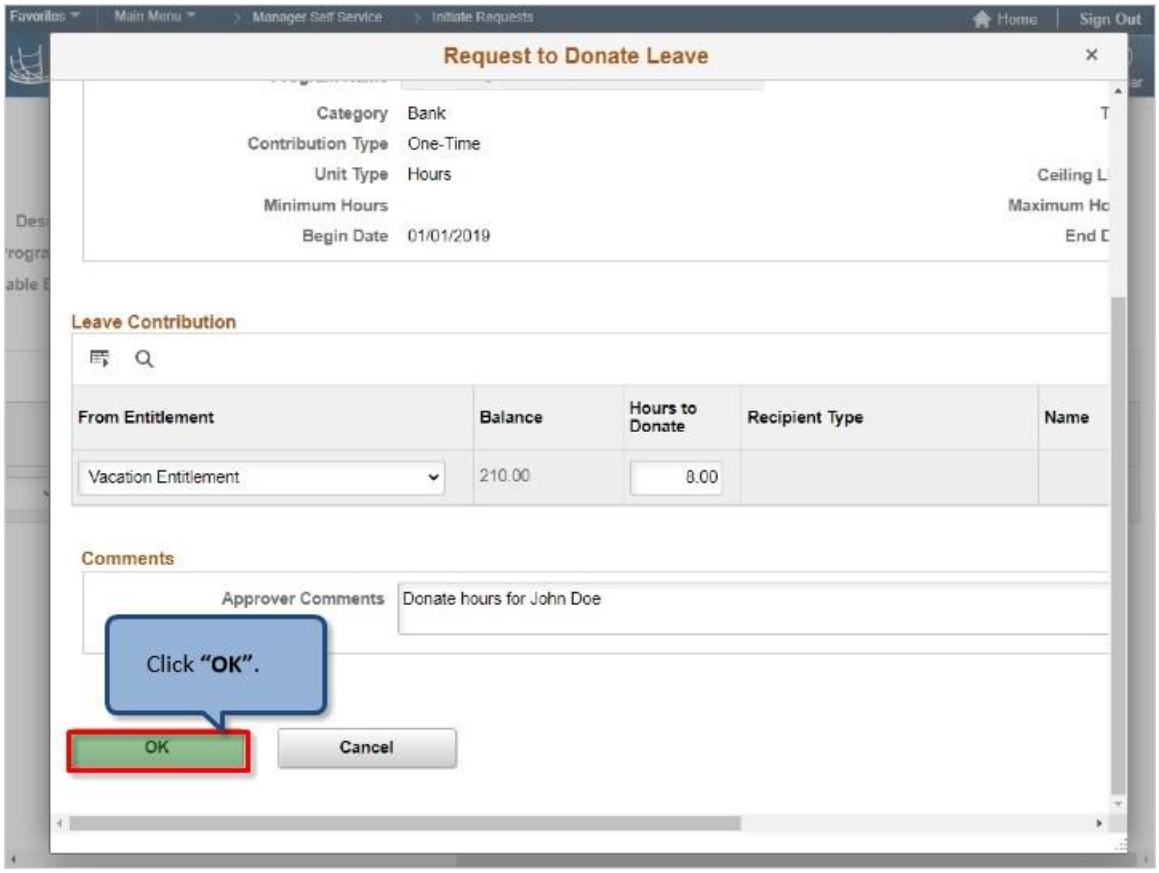


Click in the **Approver Comments** field.

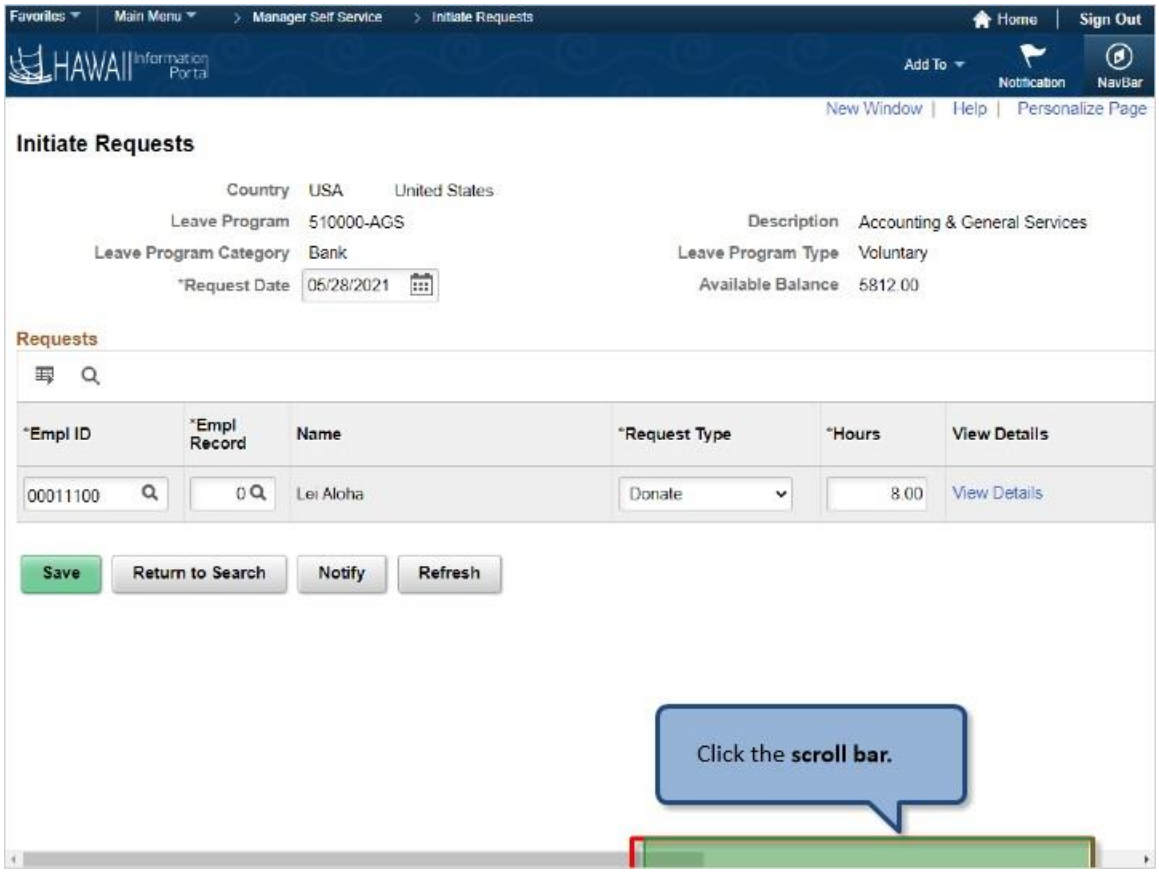


Note: If the donation is to a specific requestor, add the comments with the employee's name. For this example the donation is intended for "John Doe".

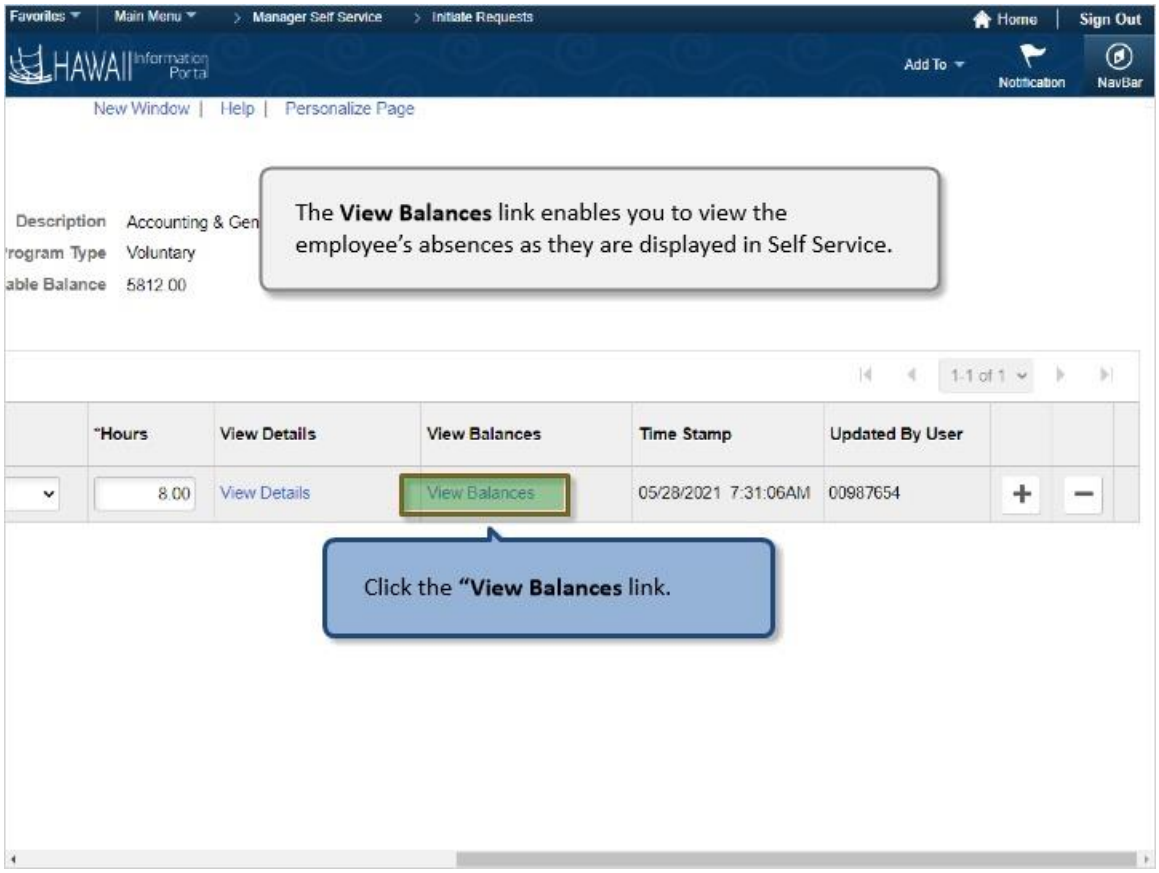
Type **"Donate hours for John Doe"** and press **"Tab"**.


Favorites
Main Menu
Manager Self Service
Initiate Requests
Home
Sign Out
Request to Donate Leave
Category Bank
Contribution Type One-Time
Unit Type Hours
Minimum Hours
Begin Date 01/01/2019
Leave Contribution
From Entitlement
Balance
Hours to Donate
Recipient Type
Name
Vacation Entitlement
210.00
8.00
Comments
Approver Comments
Donate hours for John Doe
Click "OK".
OK
Cancel

Click **"OK"**.

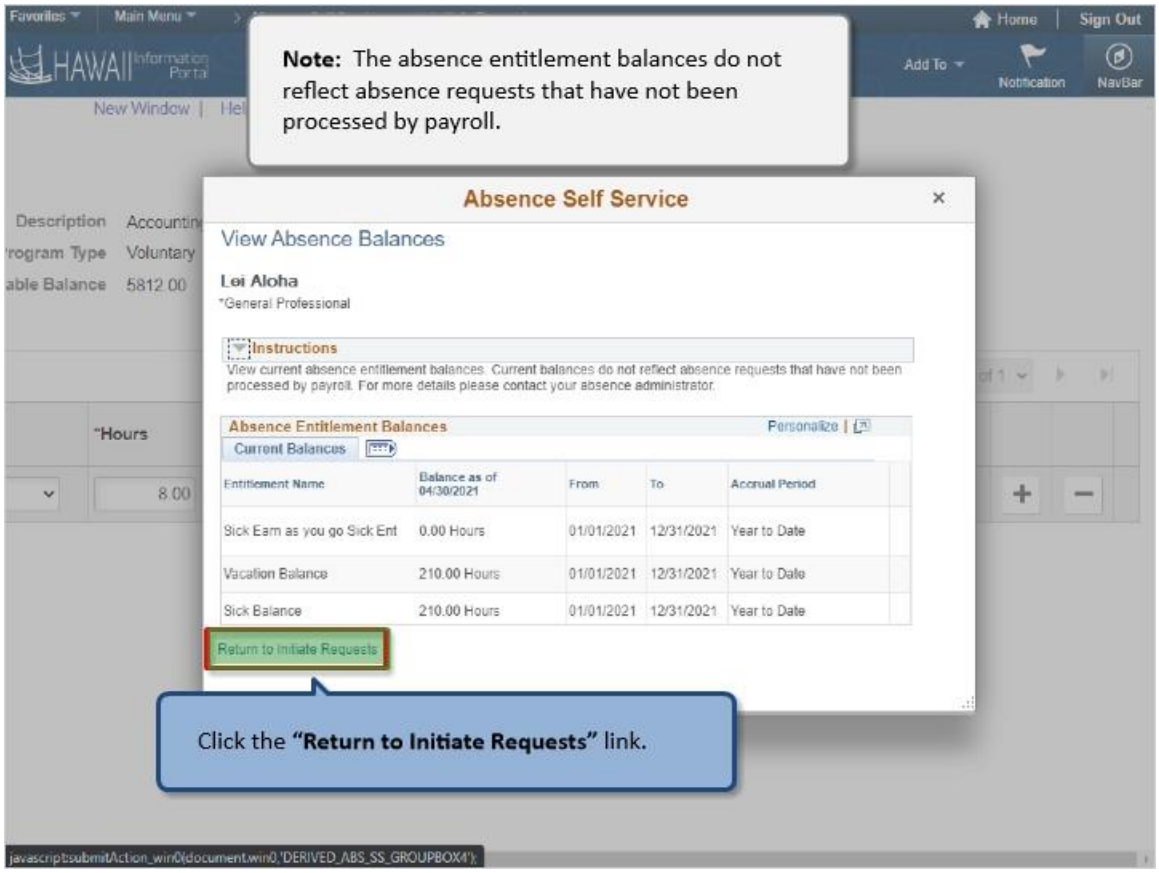


Click the **scroll bar**.



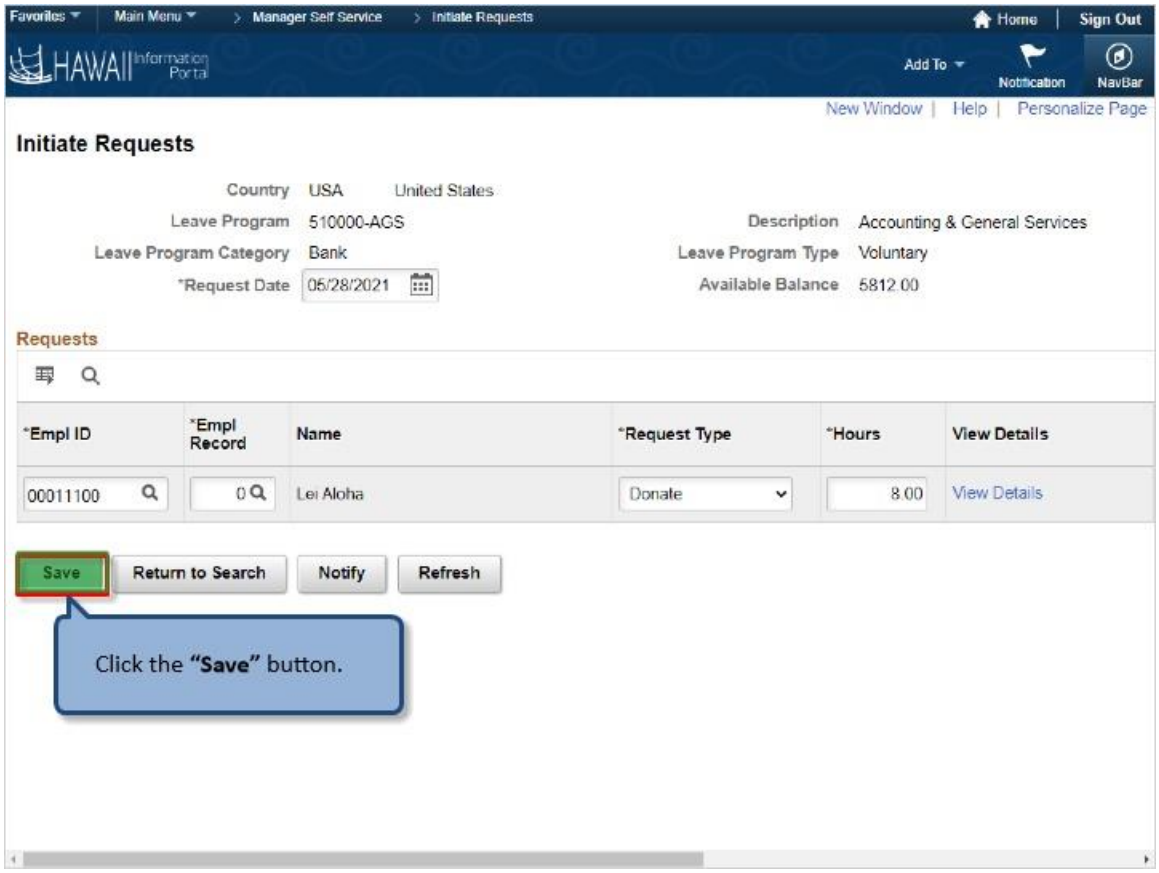
The **View Balances** link enables you to view the employee's absences as they are displayed in Self Service.

Click the **"View Balances** link.



Note: The absence entitlement balances do not reflect absence requests that have not been processed by payroll.

Click the **"Return to Initiate Requests"** link.



Click the **"Save"** button.

Congratulations!

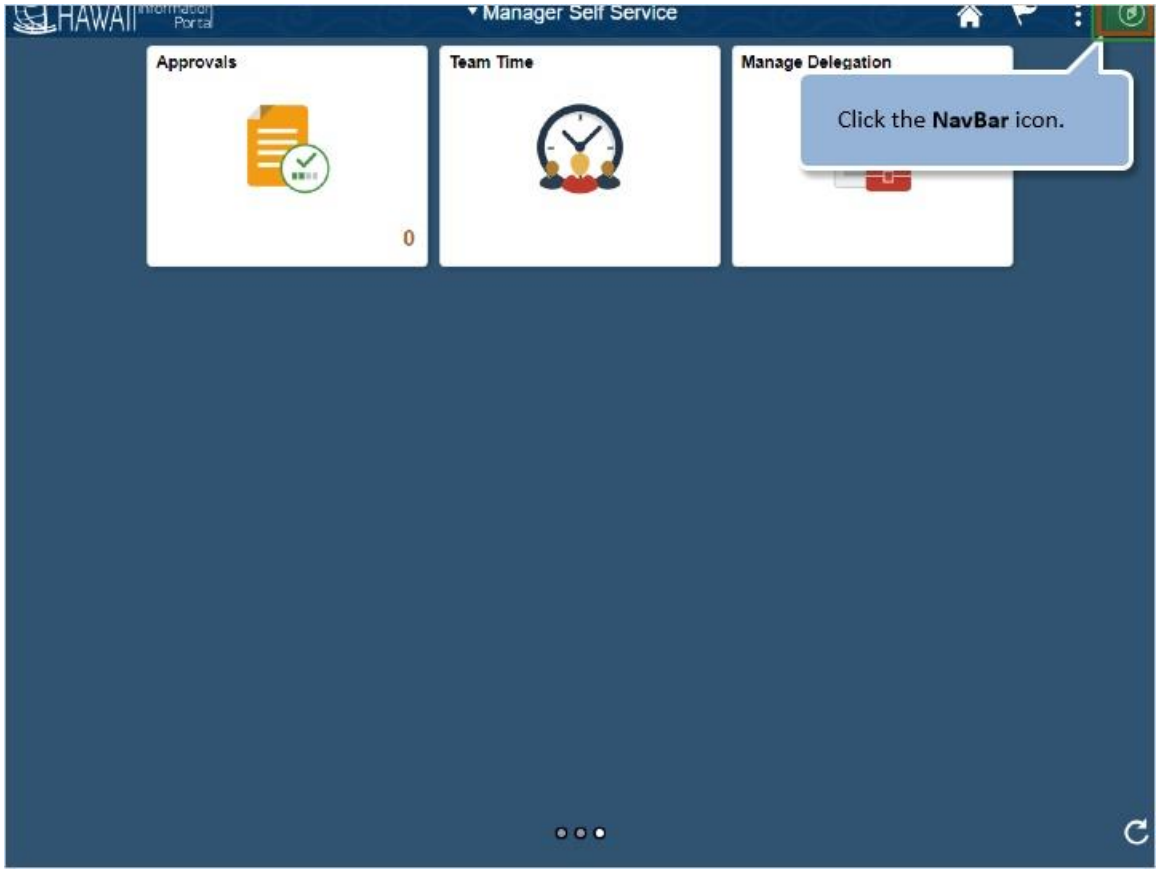
You've successfully completed this lesson.

RECEIVE DONATED LEAVE FOR EMPLOYEE

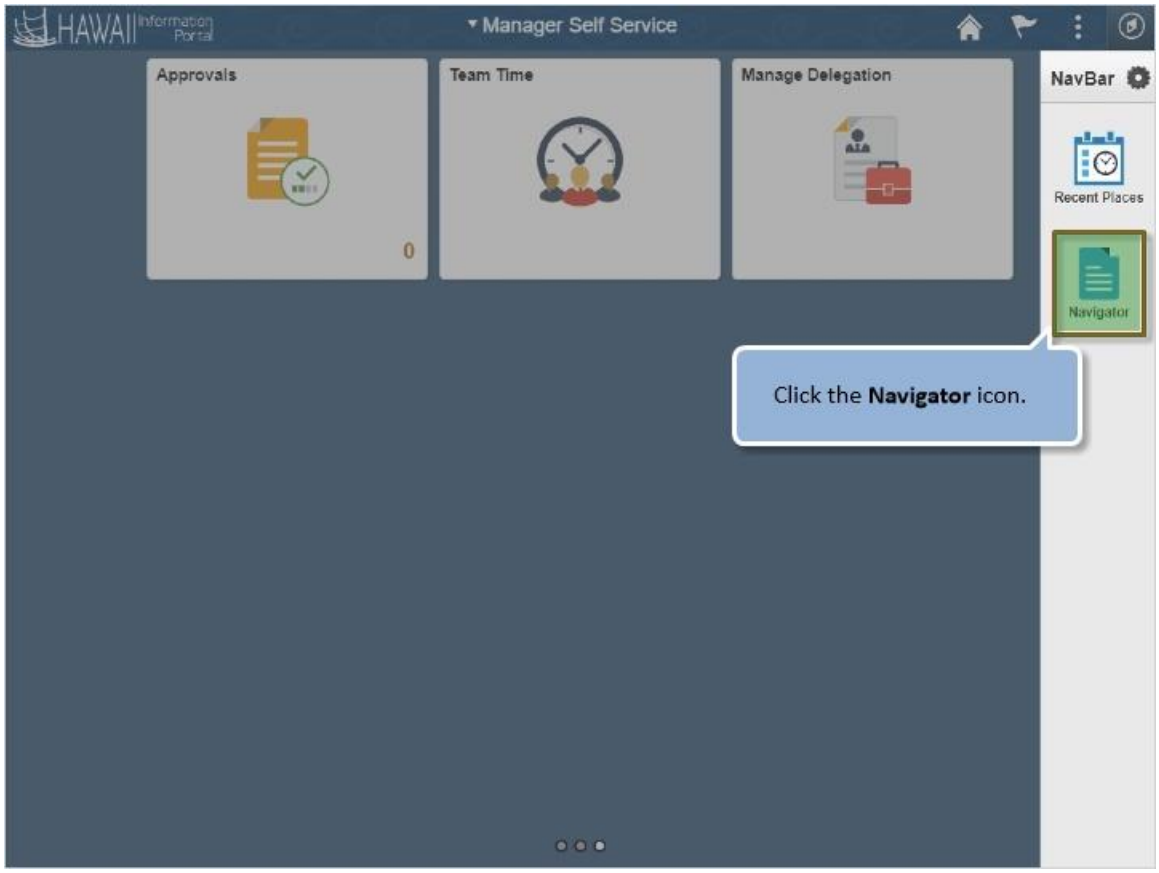
Lesson Scenario

In this lesson, you will learn how to initiate a receive leave donation request on behalf of an employee.

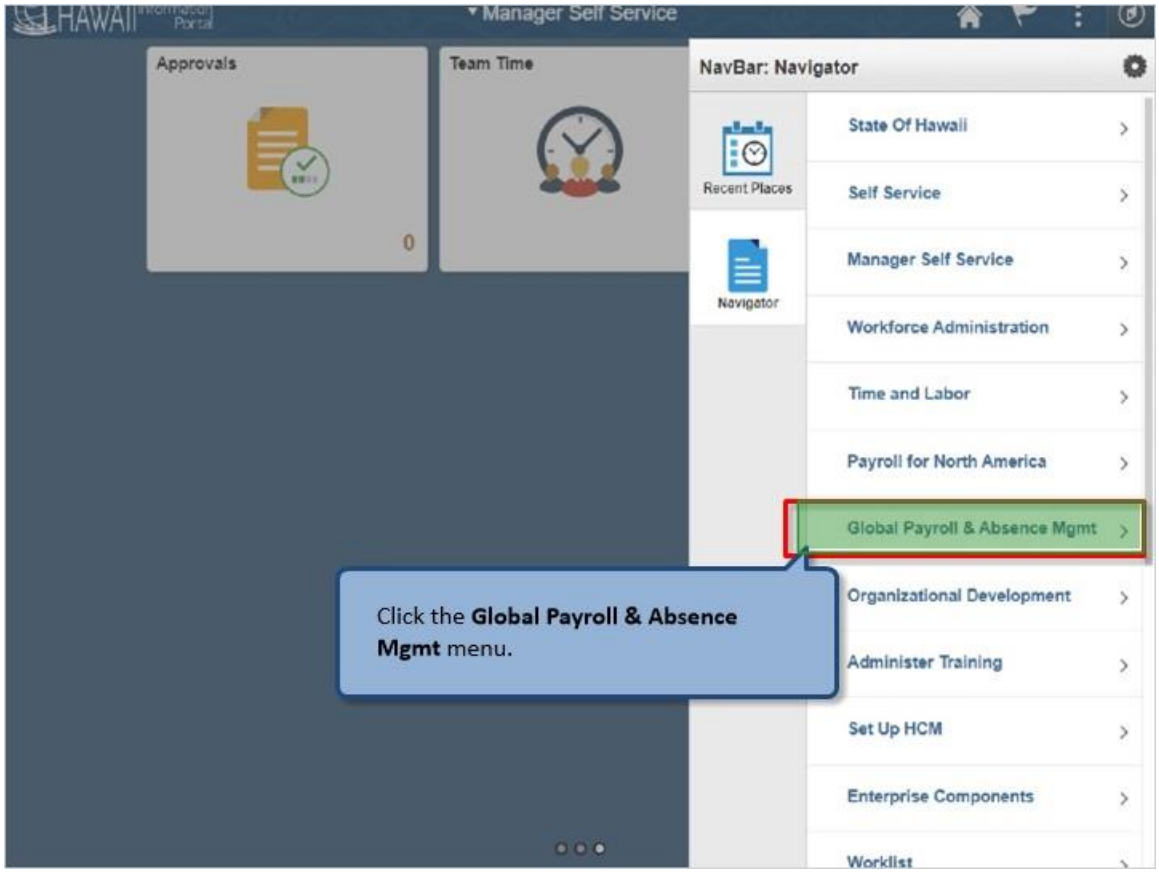
Employees have the ability to initiate a receive leave donations for themselves, however, an HR Admin may do so for an employee, as needed.



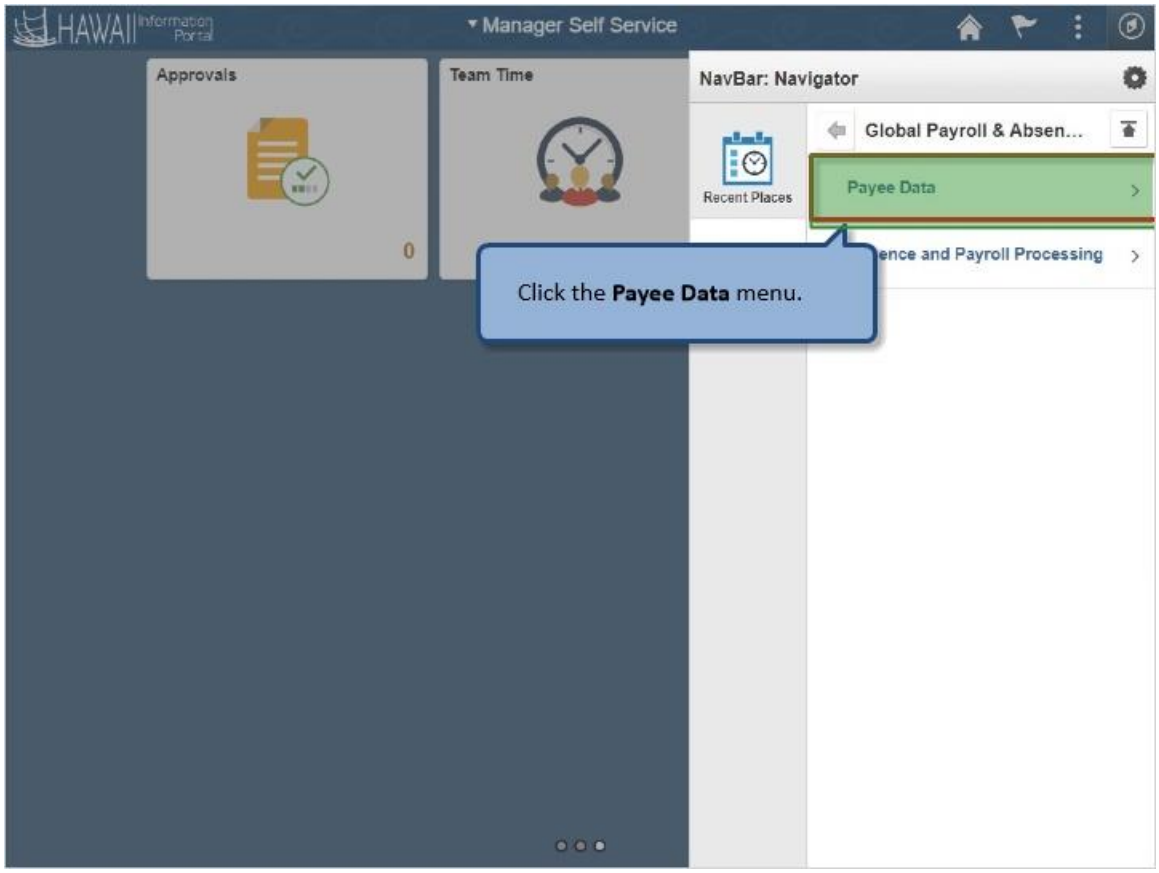
Click the **NavBar** icon.



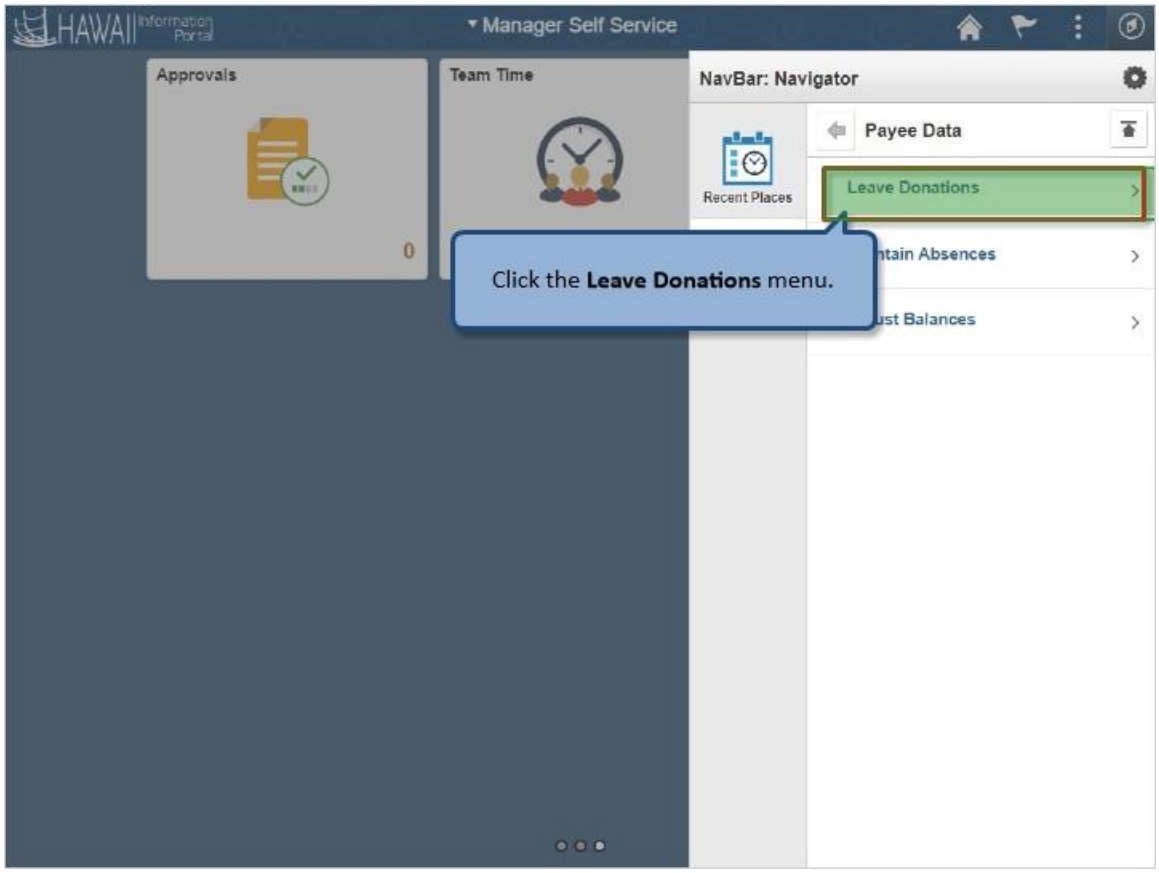
Click the **Navigator** icon.



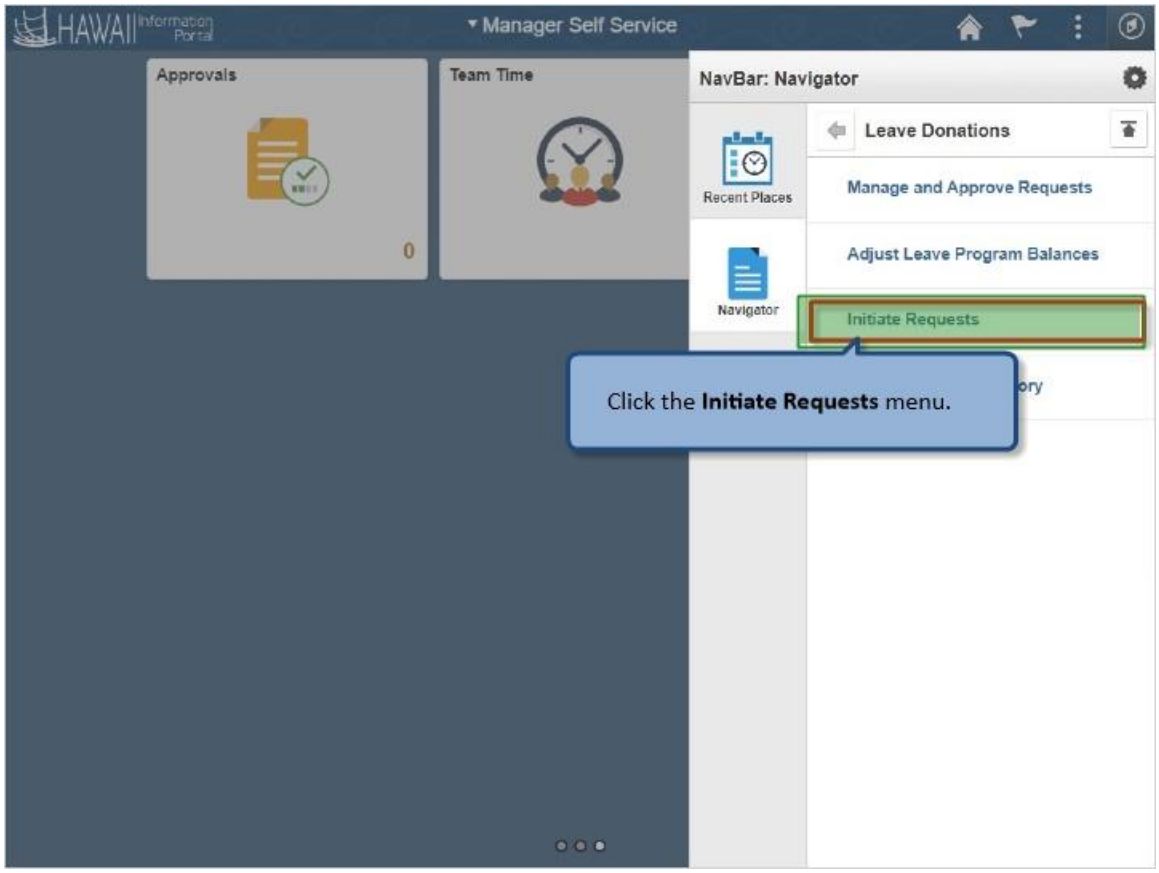
Click the **Global Payroll & Absence Mgmt** menu.



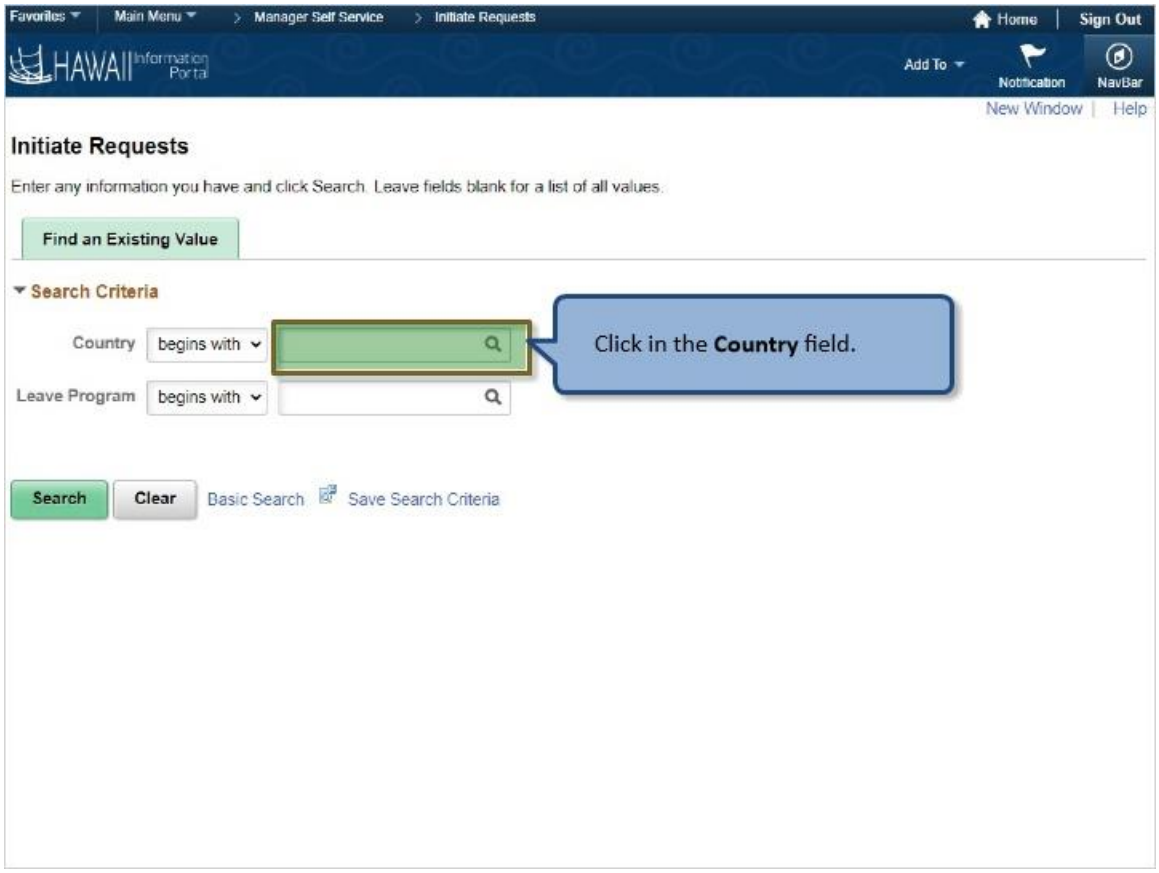
Click the **Payee Data** menu..



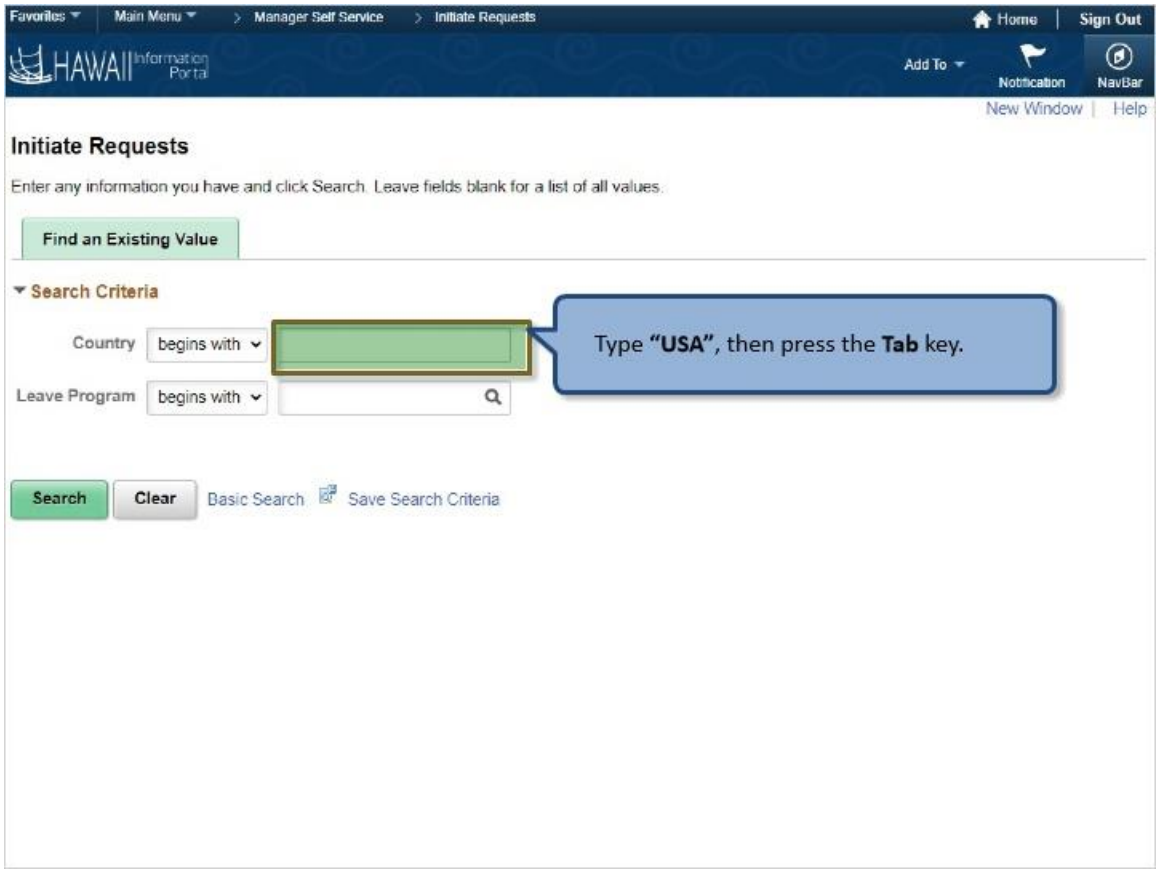
Click the **Leave Donations** menu.



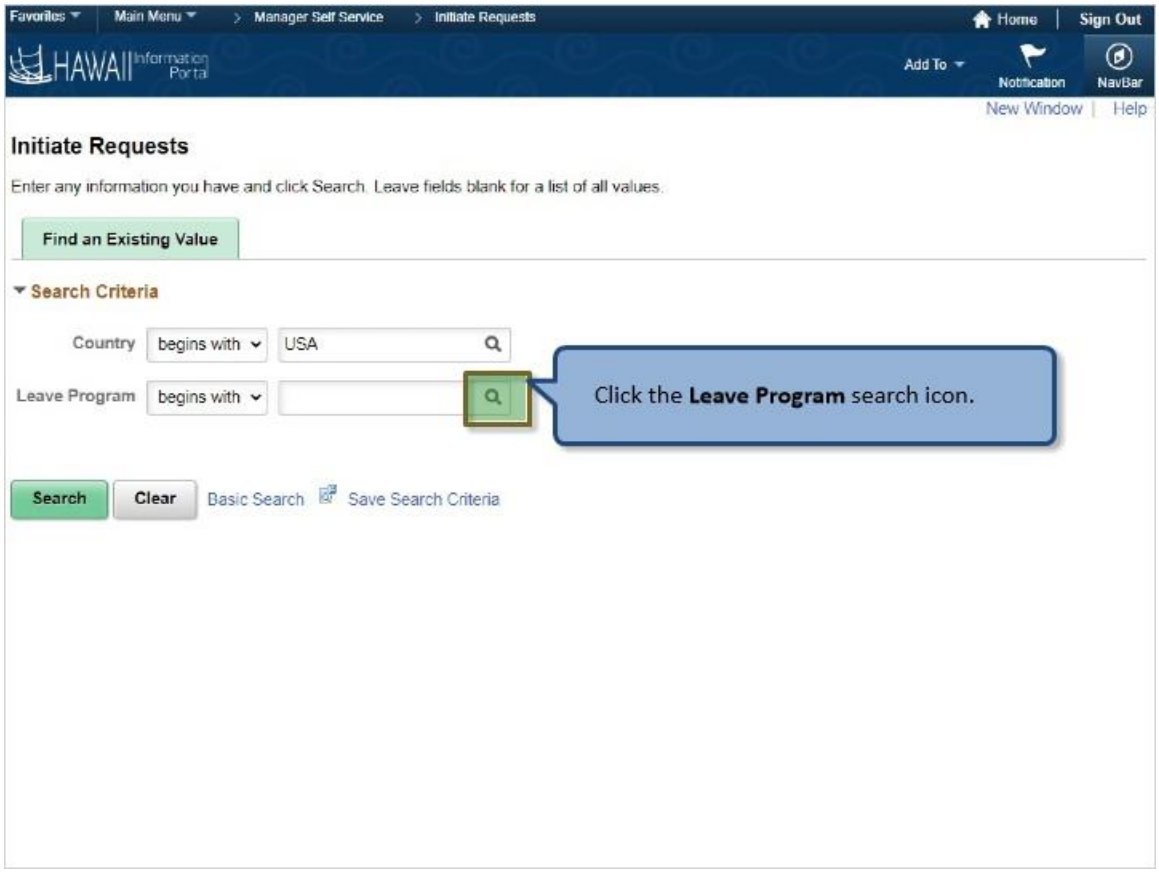
Click the **Initiate Requests** menu.



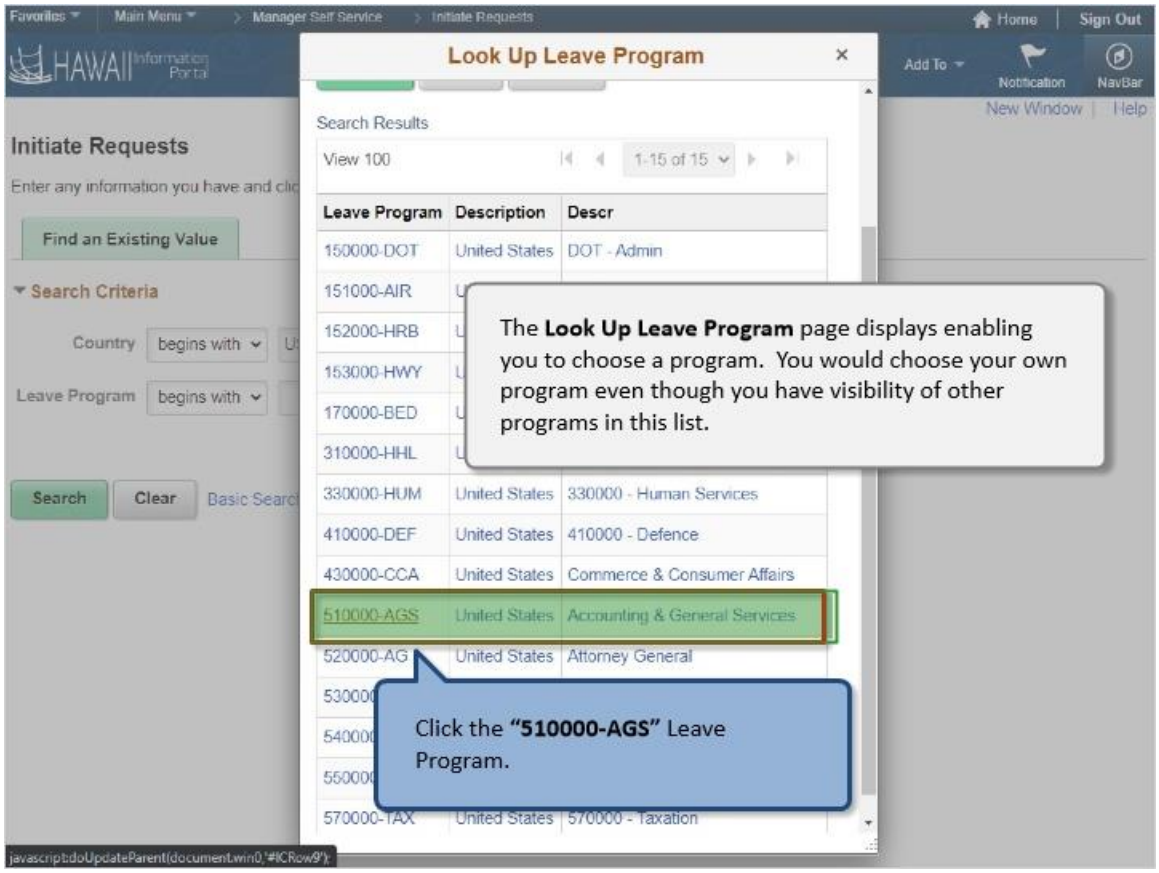
Click in the **Country** field.



Type **"USA",** then press the **Tab** key.

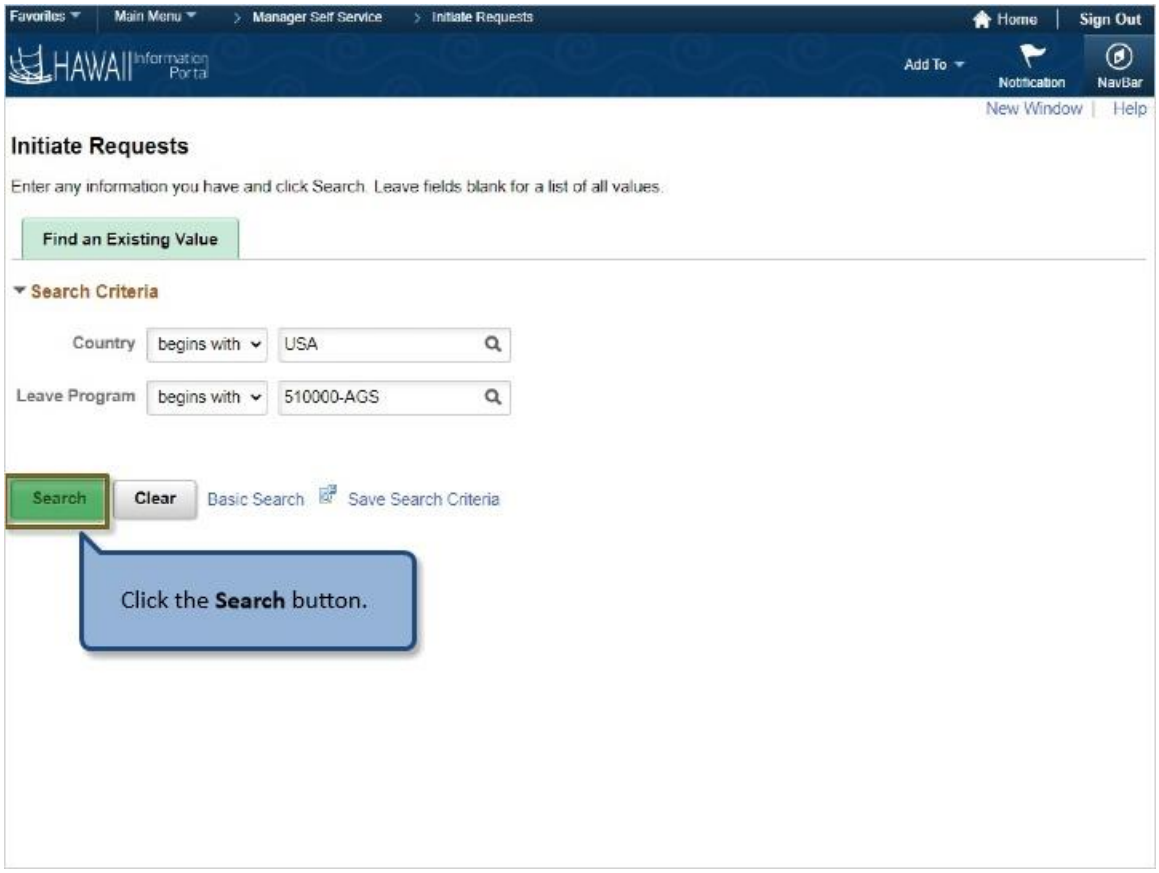


Click the **Leave Program** search icon.

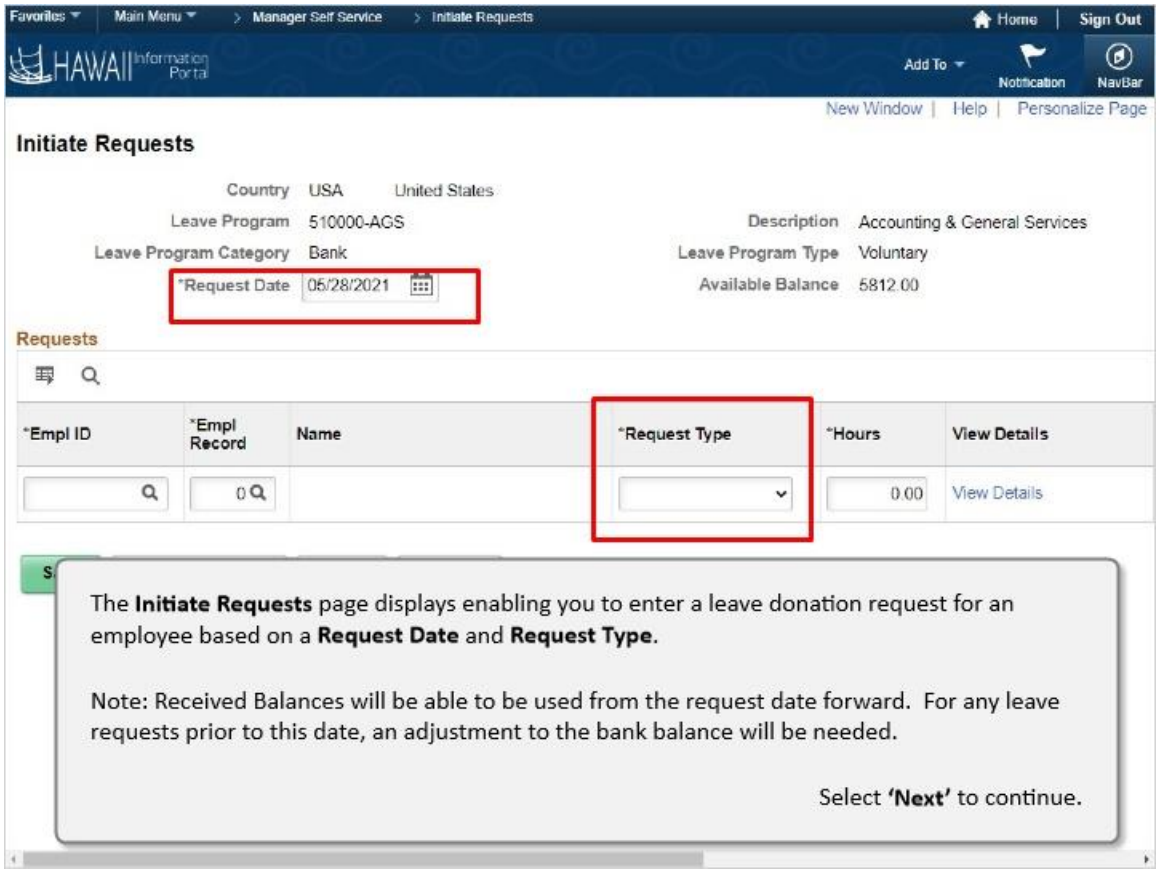


The **Look Up Leave Program** page displays enabling you to choose a program. You would choose your own program even though you have visibility of other programs in this list.

Click the **"510000-AGS"** Leave Program.

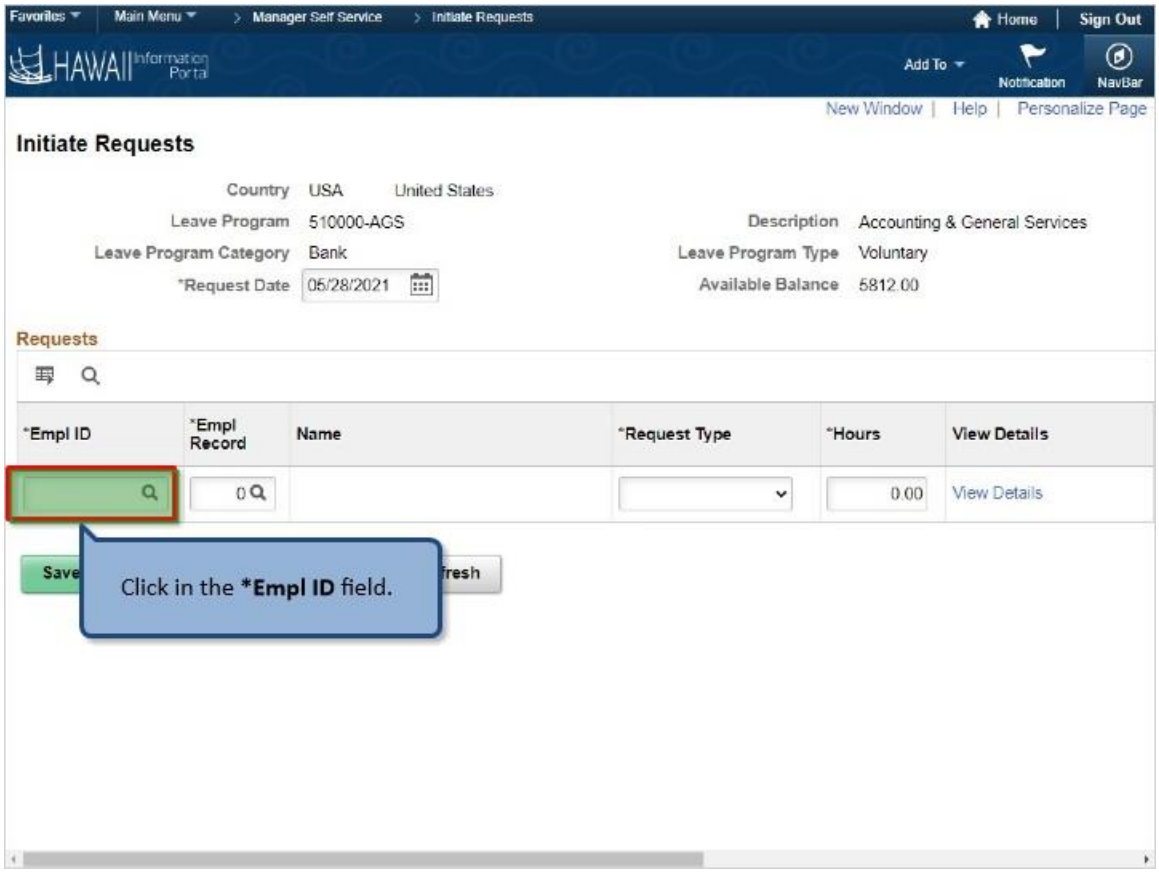


Click the **Search** button.

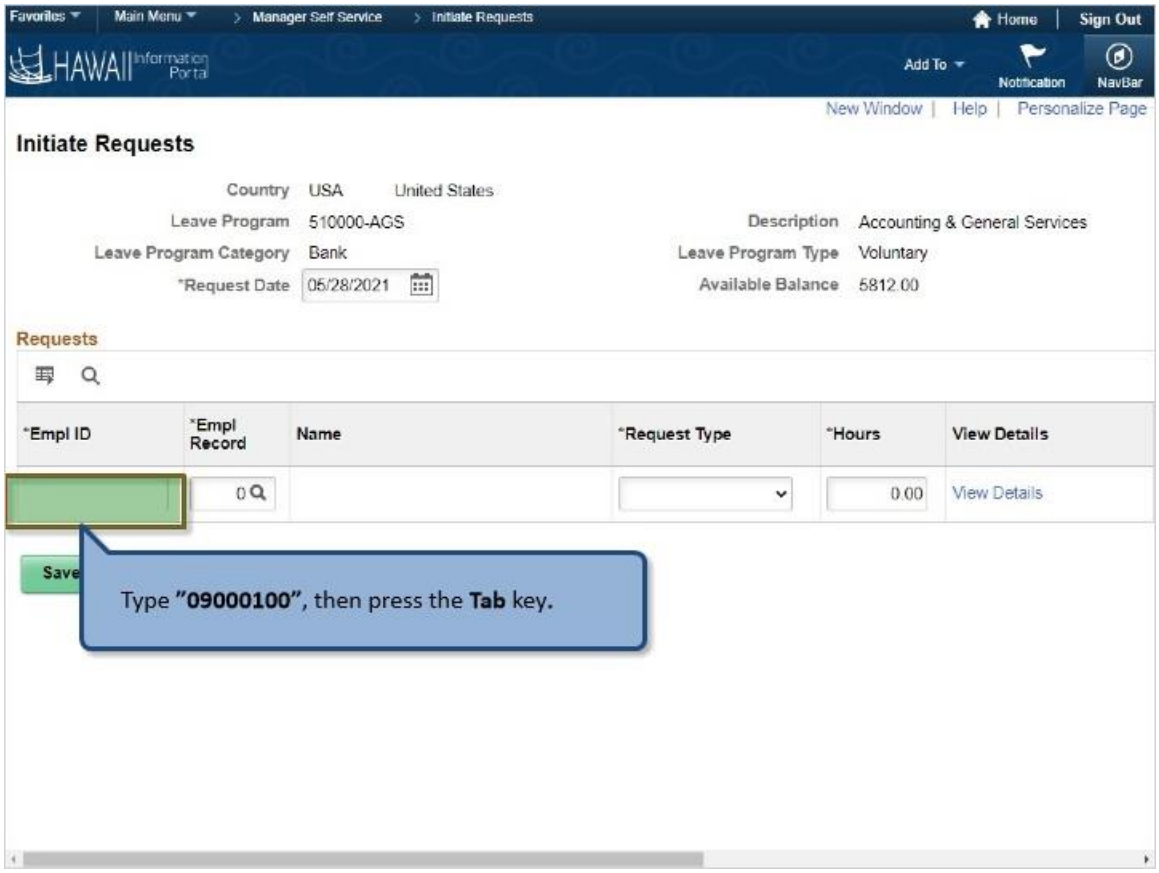


The **Initiate Requests** page displays enabling you to enter a leave donation request for an employee based on a **Request Date** and **Request Type**.

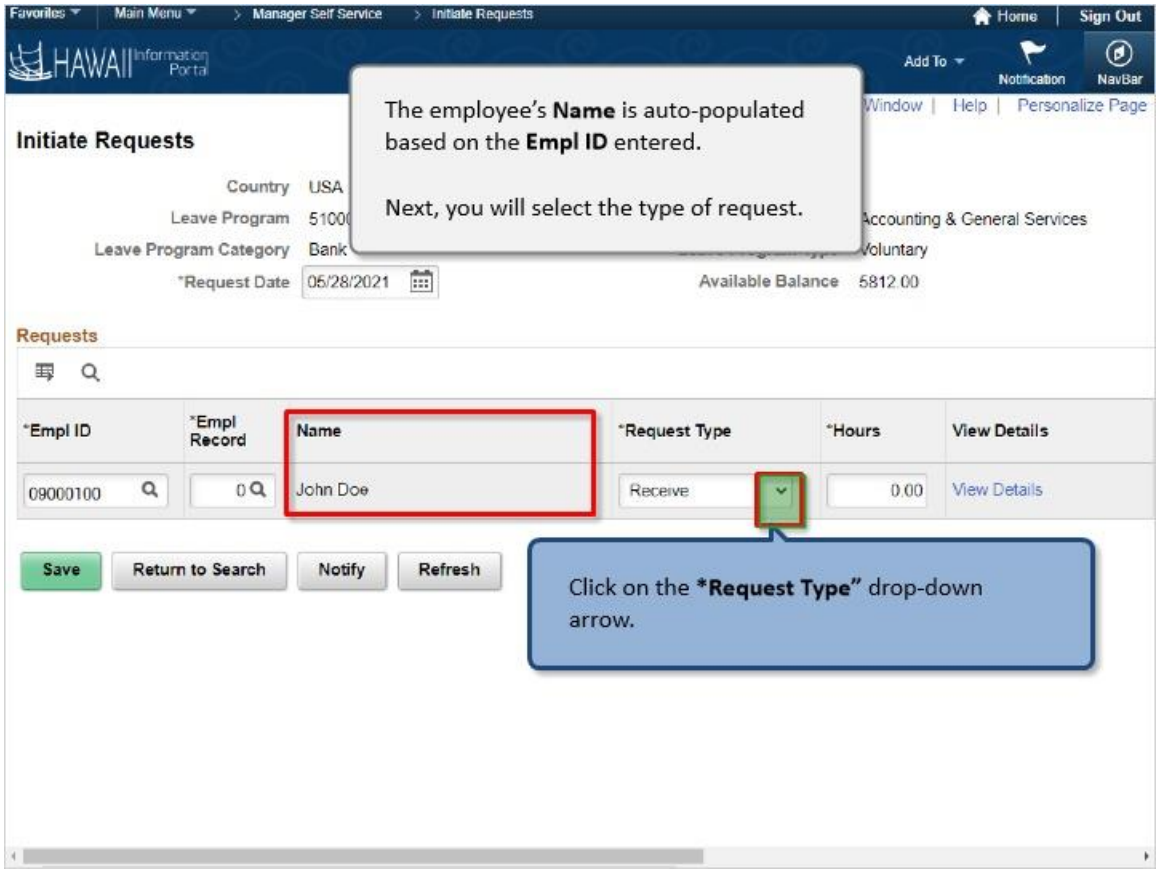
Note: Received Balances will be able to be used from the request date forward. For any leave requests prior to this date, an adjustment to the bank balance will be needed.



Click in the ***Empl ID*** field.



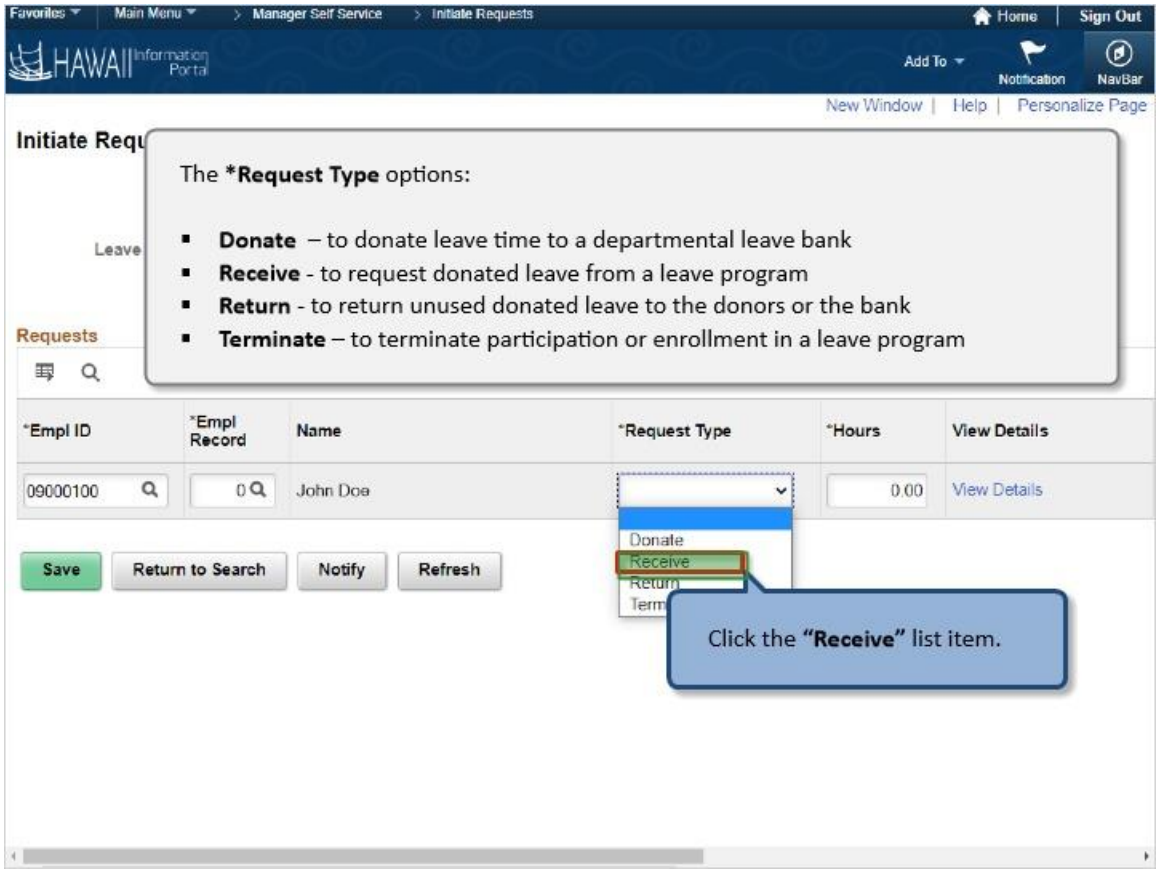
Type **"09000100"**, then press the **Tab** key**.**



The employee's Name is auto-populated based on the **Empl ID** entered.

Next, you will select the type of request.

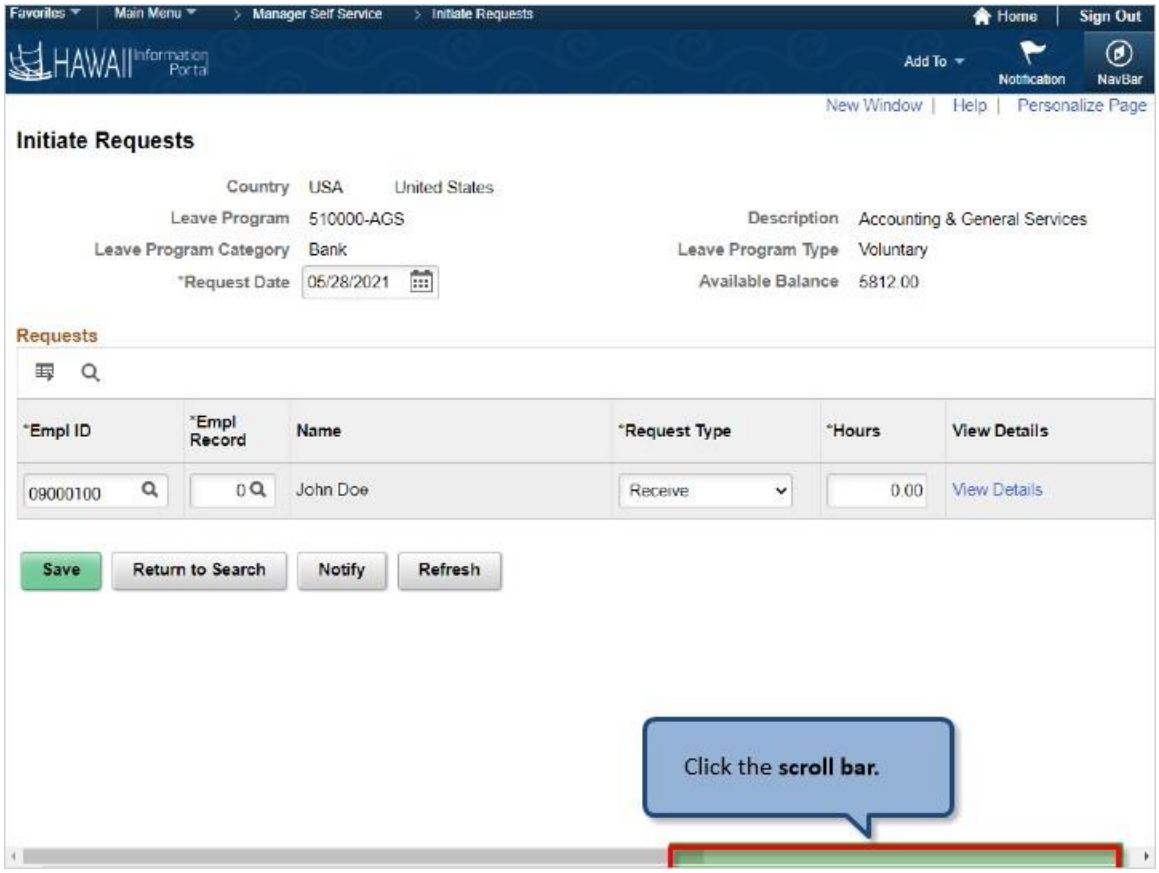
Click on the ***Request Type"** drop-down arrow.



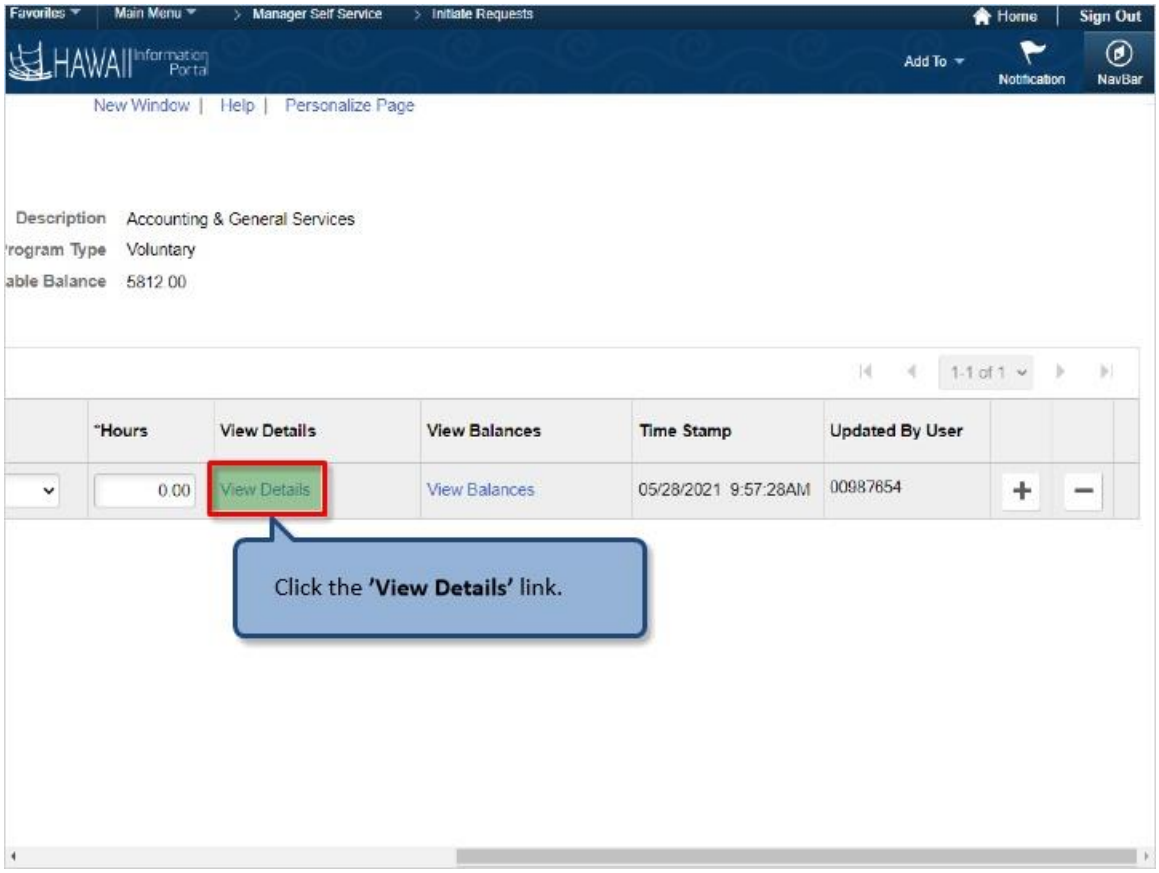
The ***Request Type** options:

- **Donate** - to donate leave time to a departmental leave bank
- **Receive** - to request donated leave from a leave program
- **Return** - to return unused donated leave to the donors or the bank
- **Terminate** - to terminate participation or enrollment in a leave program

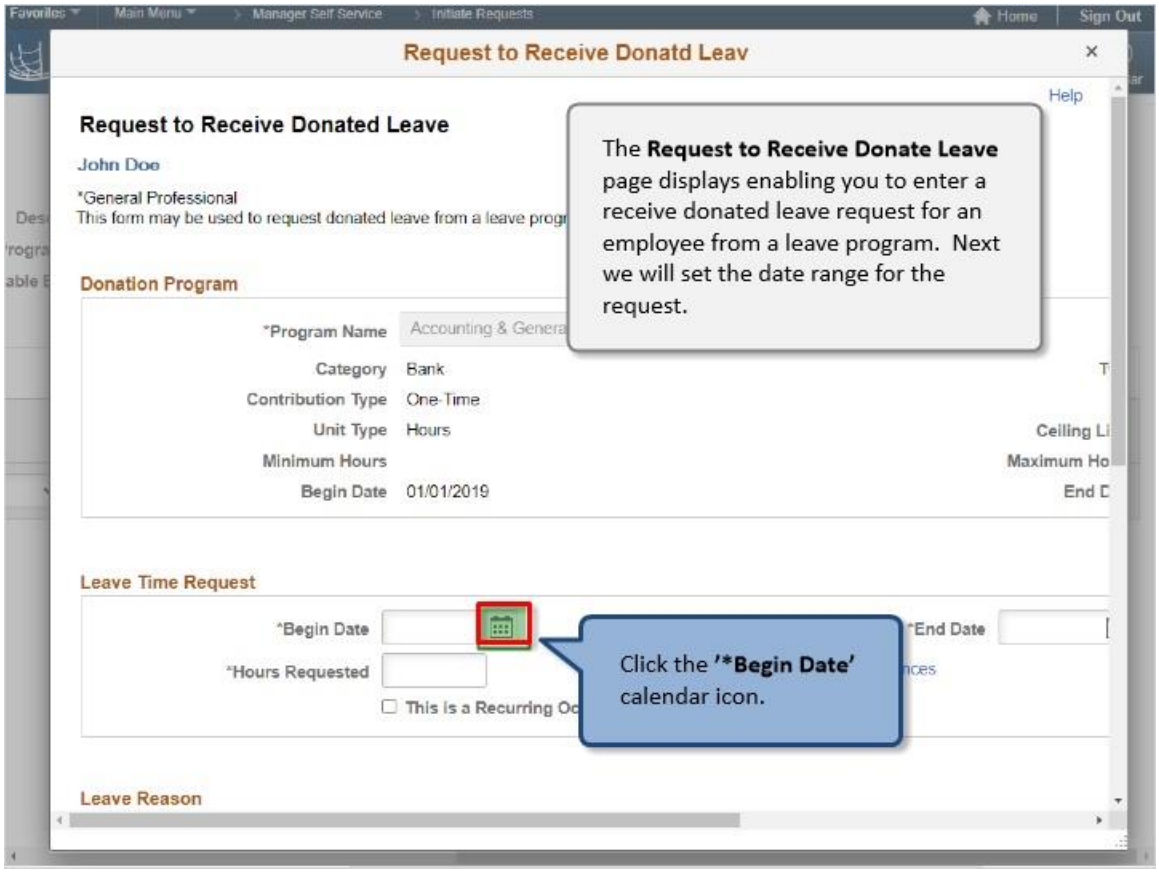
Click the **"Receive"** list item.



Click the **scroll bar**.

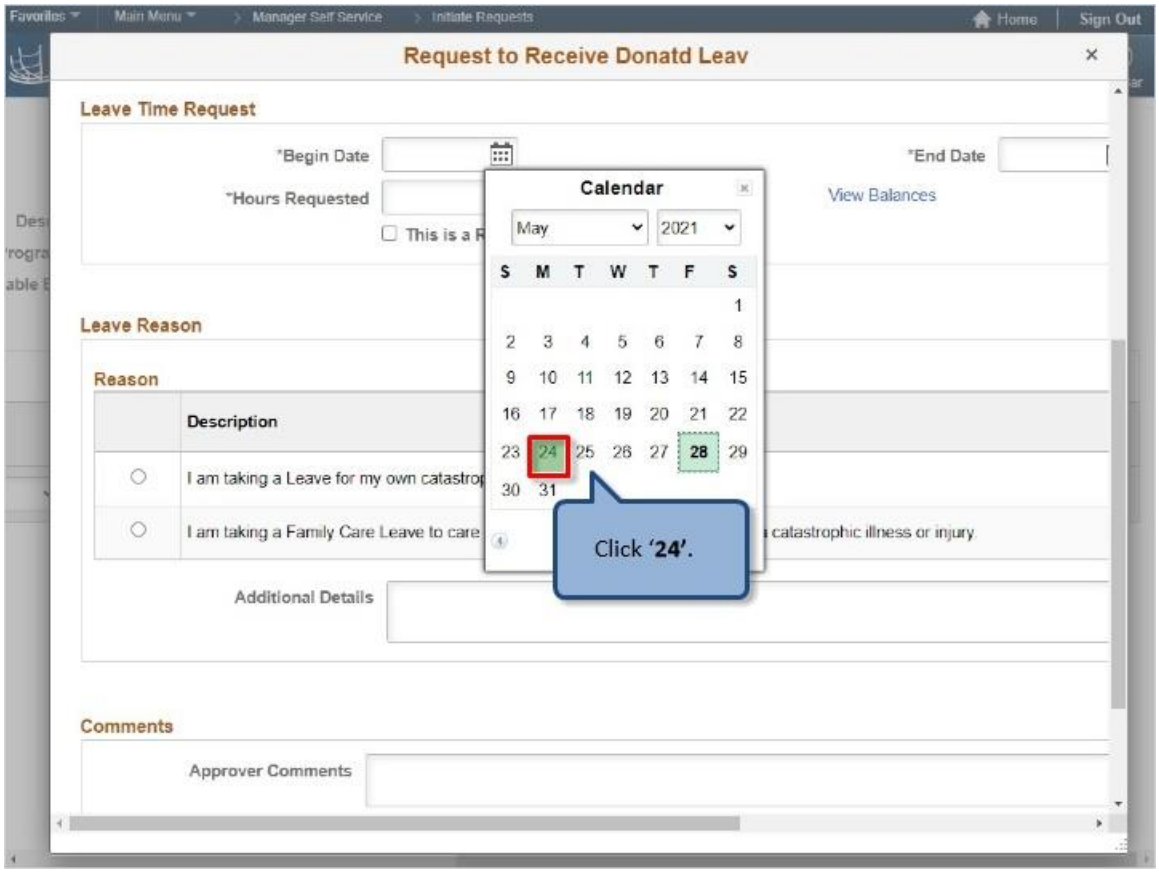


Click the **'View Details'** link.

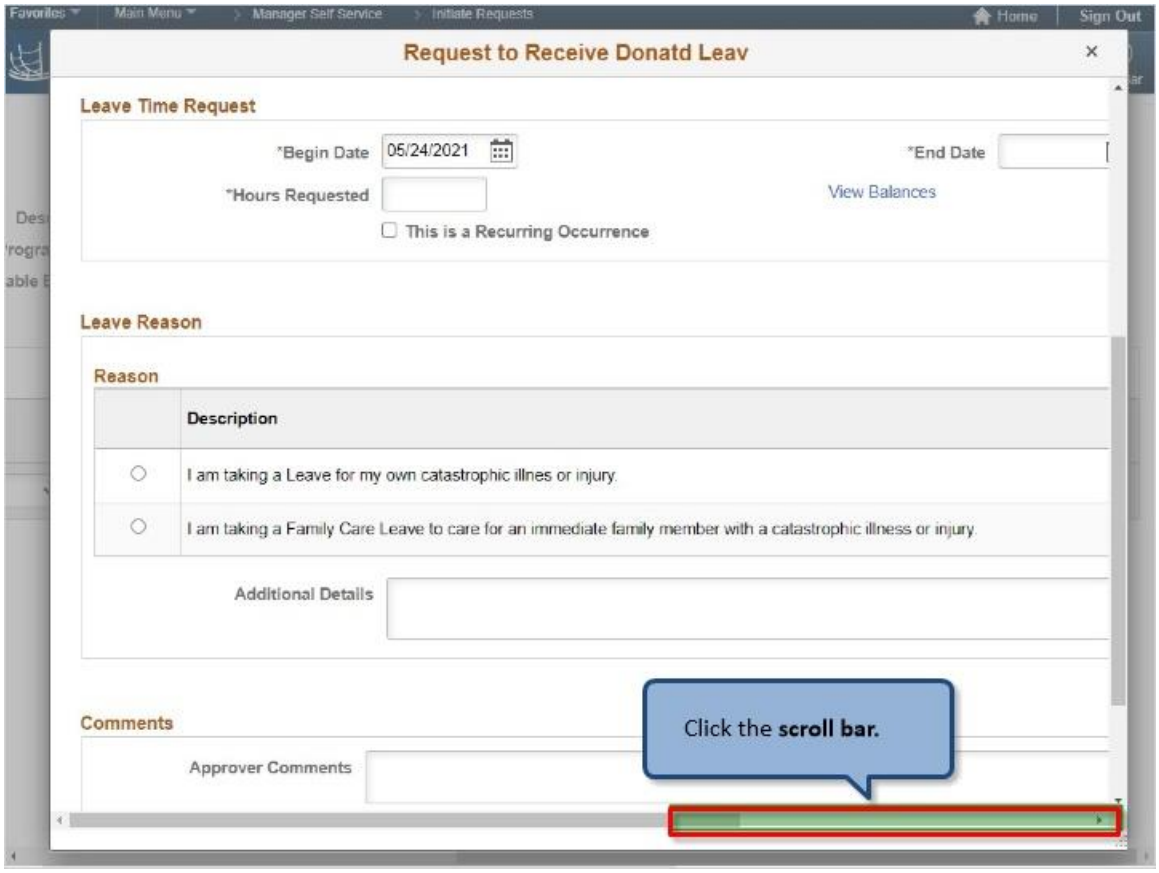


The **Request to Receive Donate Leave** page displays enabling you to enter a receive donated leave request for an employee from a leave program. Next we will set the date range for the request.

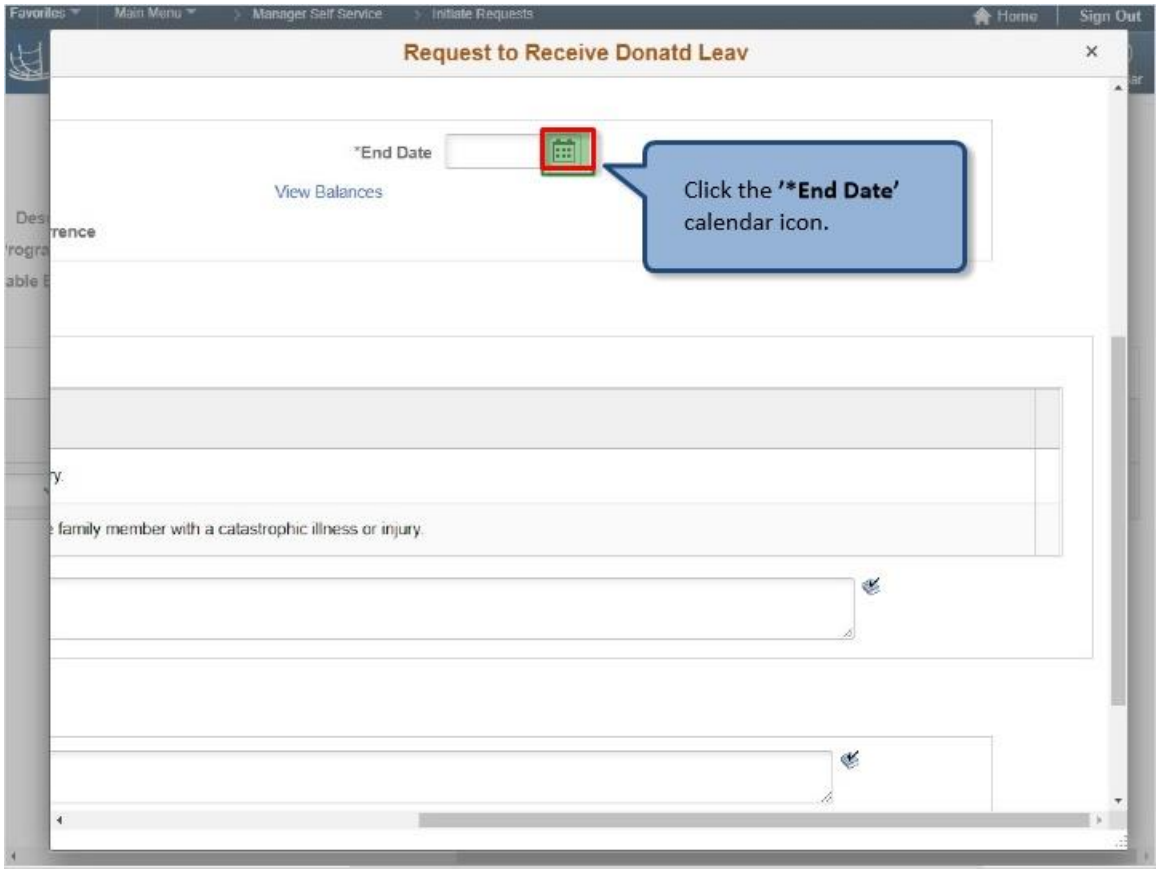
Click the **'*Begin Date'** calendar icon.


Favorites
Main Menu
Manager Self Service
Initiate Requests
Home
Sign Out
Request to Receive Donatd Leav
Leave Time Request
*Begin Date
*End Date
*Hours Requested
View Balances
This is a R
Calendar
May
2021
S M T W T F S
1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30 31
Click '24'.
Leave Reason
Reason
Description
I am taking a Leave for my own catastrop
I am taking a Family Care Leave to care
catastrophic illness or injury
Additional Details
Comments
Approver Comments

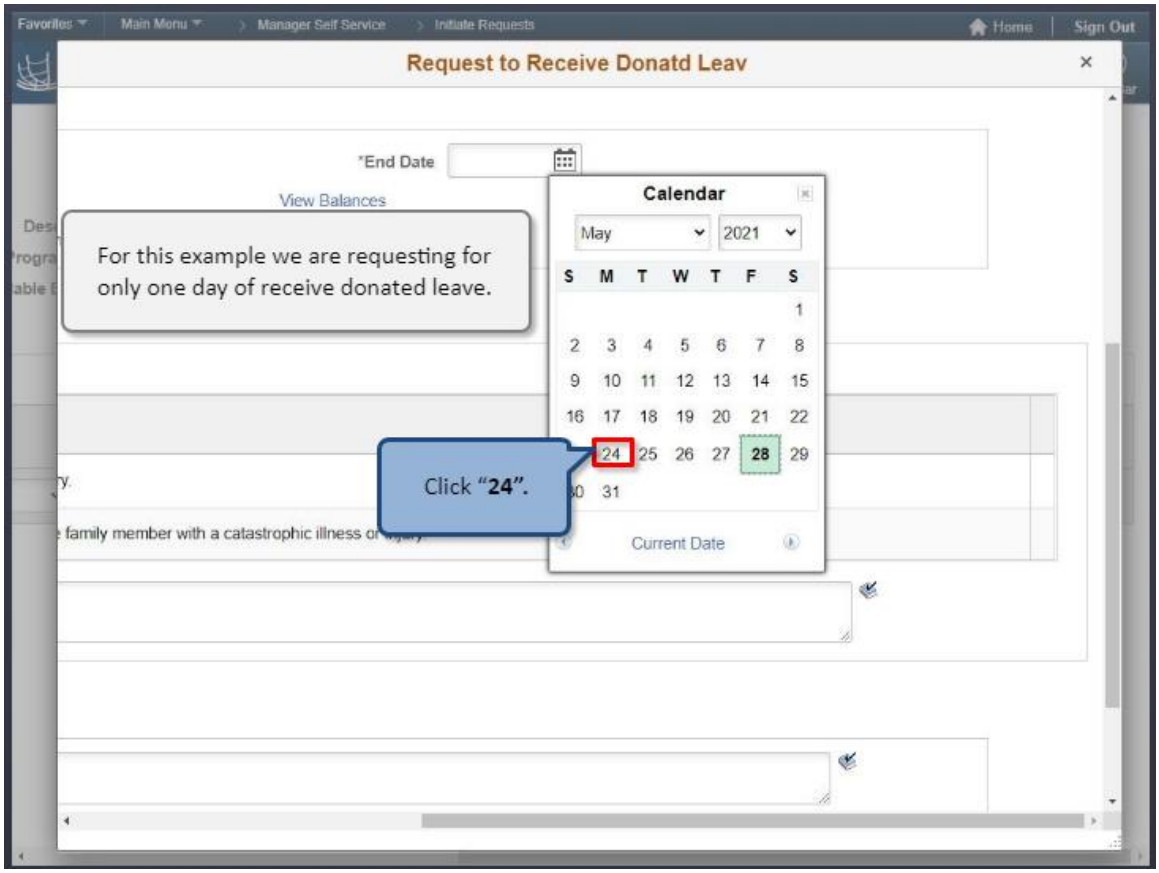
Click '**24**'.



Click the **scroll bar**.

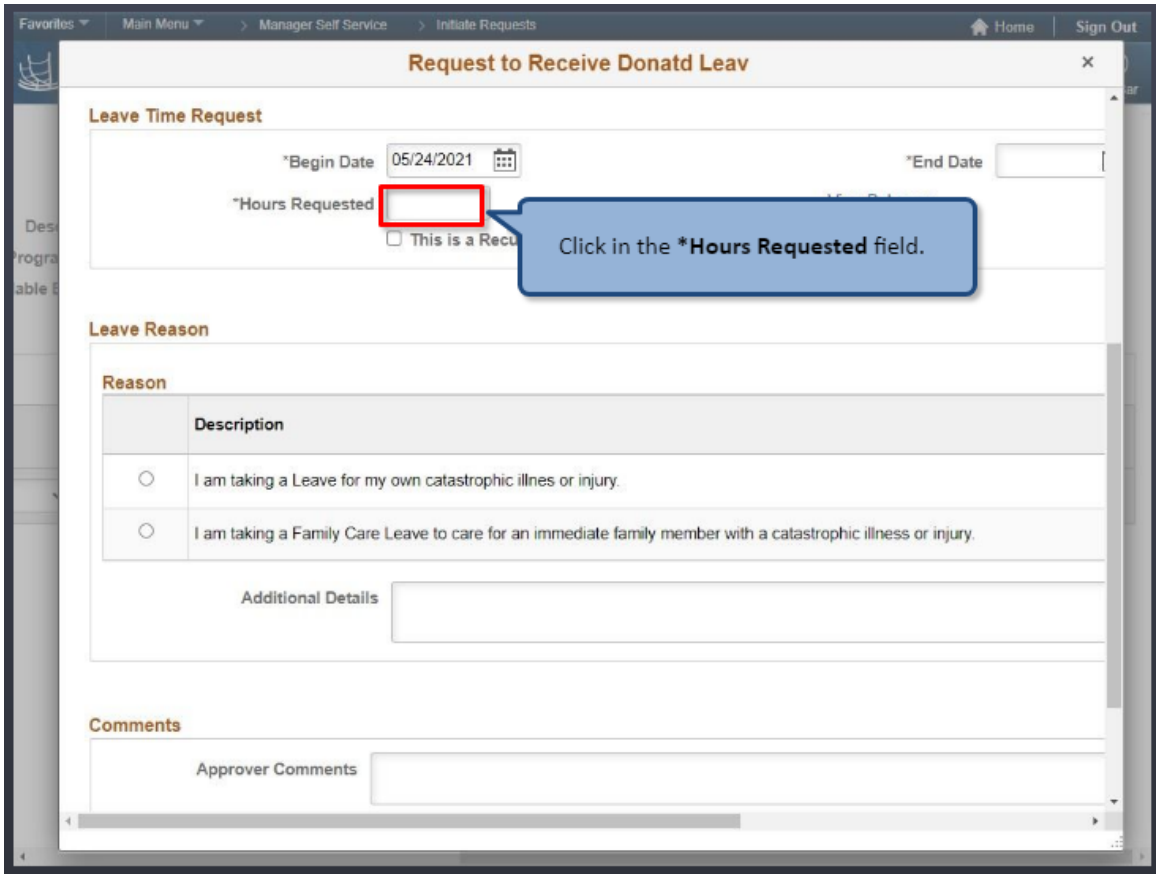


Click the '***End Date'** calendar icon.

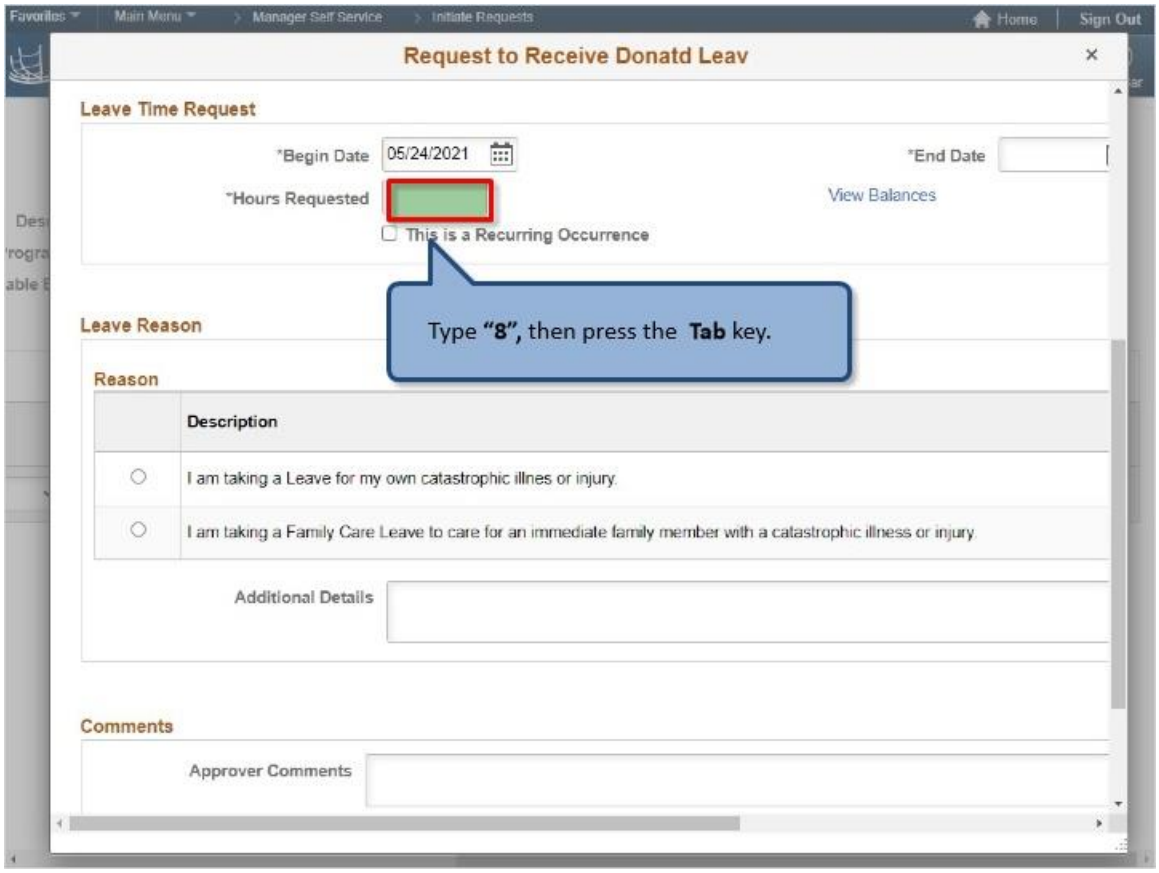


For this example we are requesting for only one day of receive donated leave.

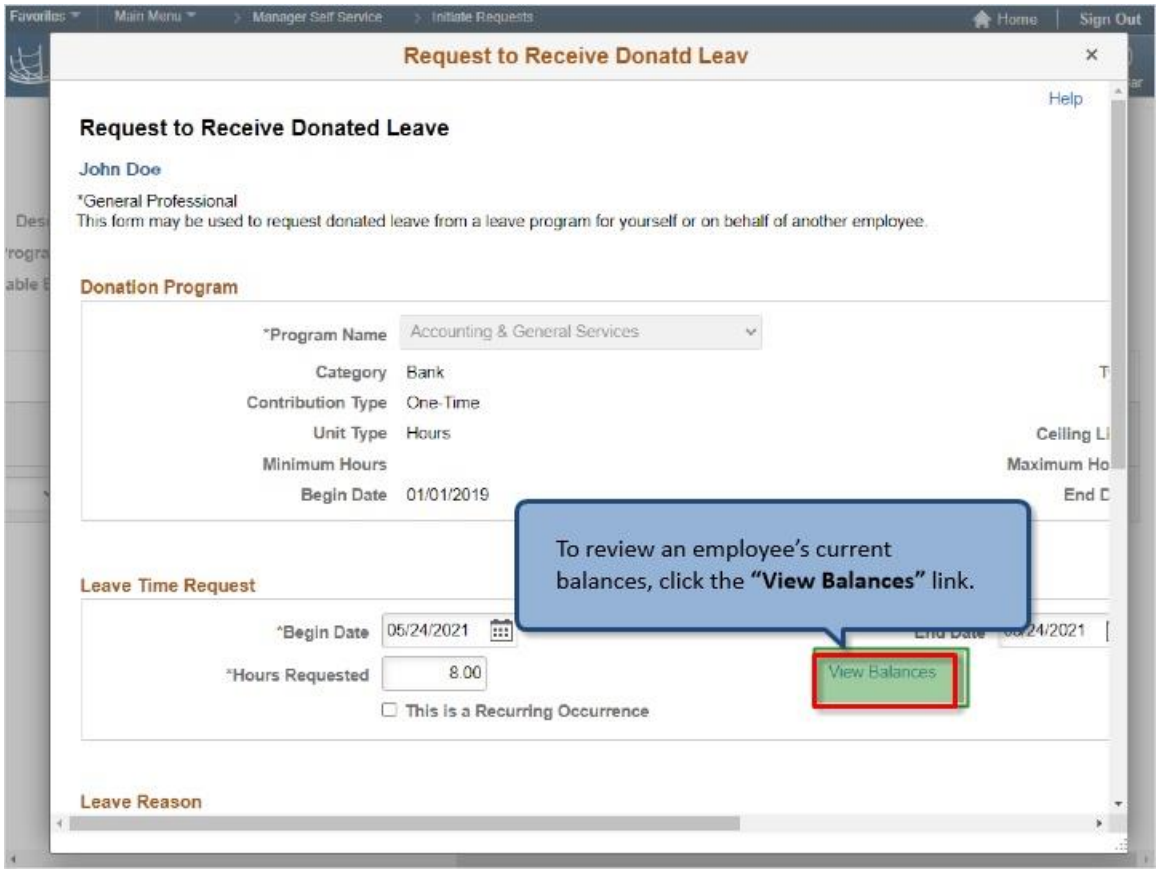
Click "**24".**



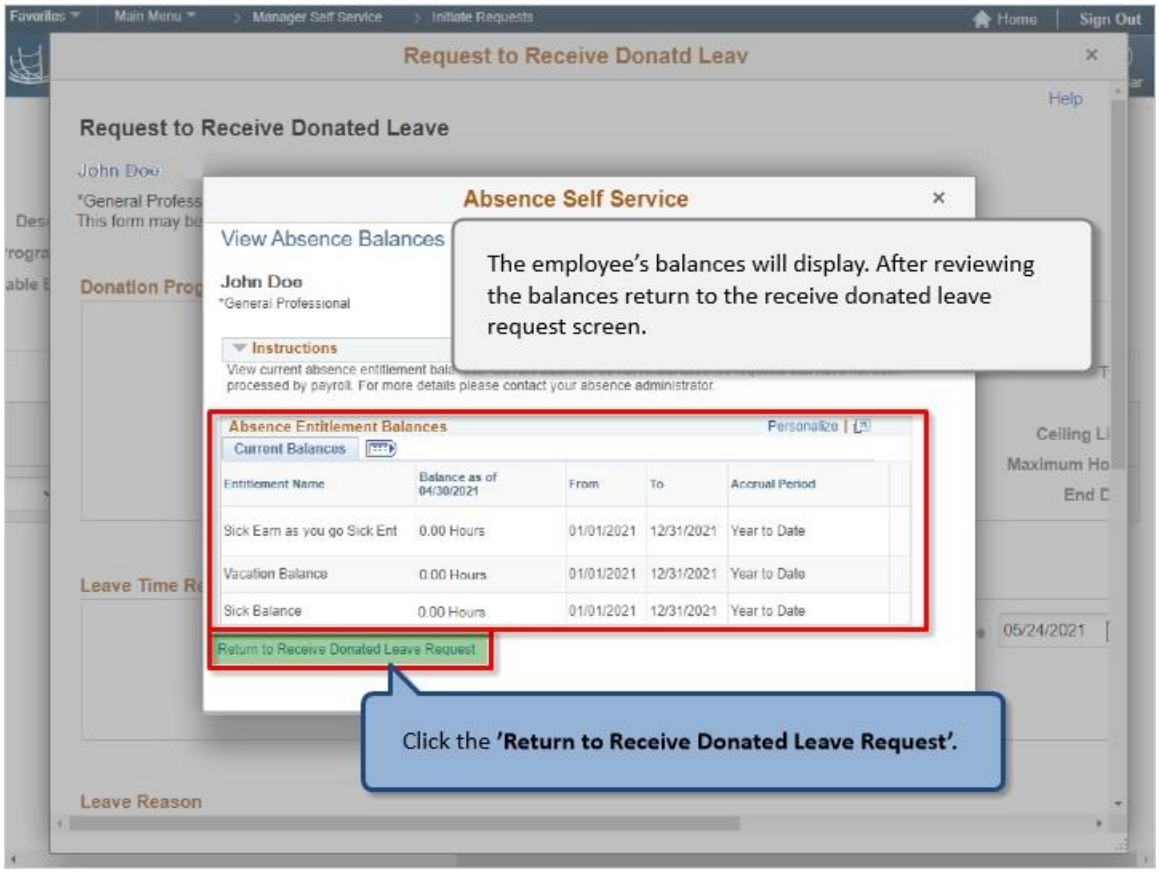
Click in the ***Hours Requested** field.



Type **"8"**, then press the **Tab** key.

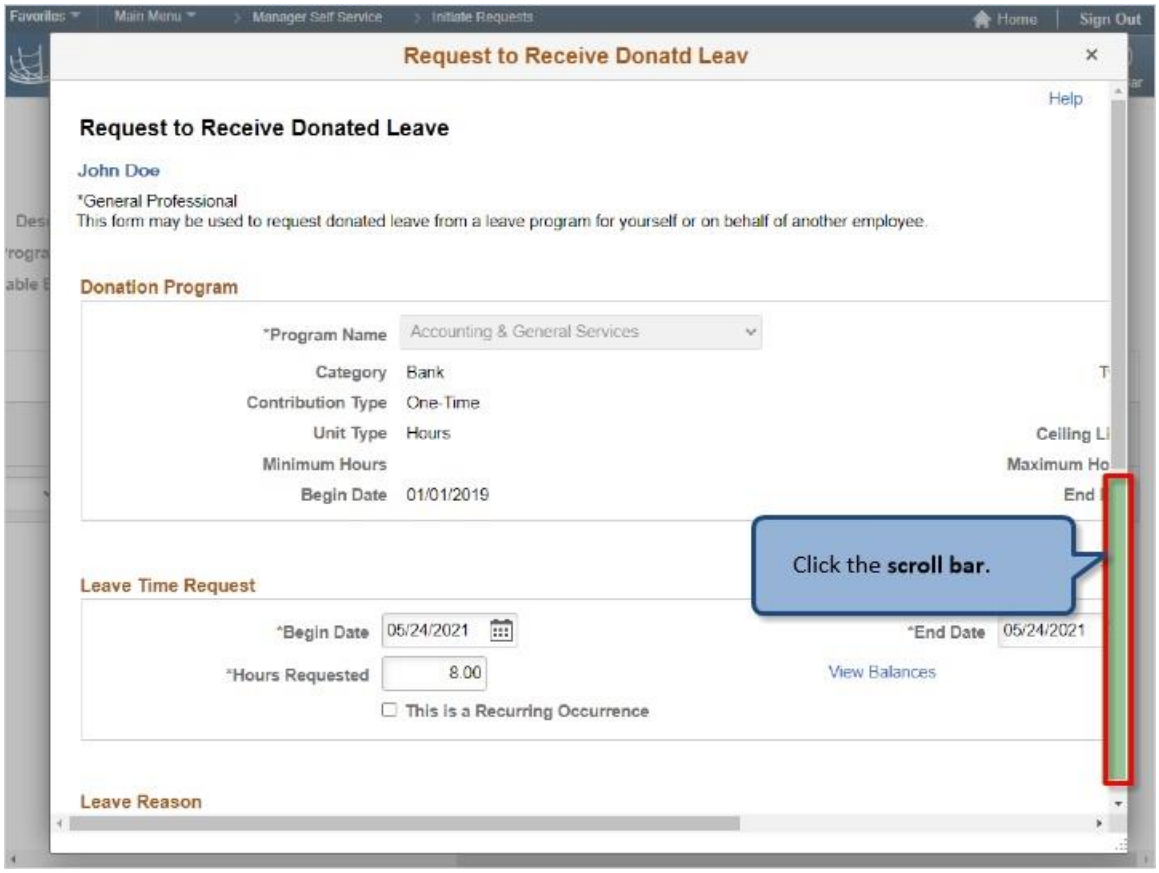


To review an employee's current balances, click the **"View Balances"** link.

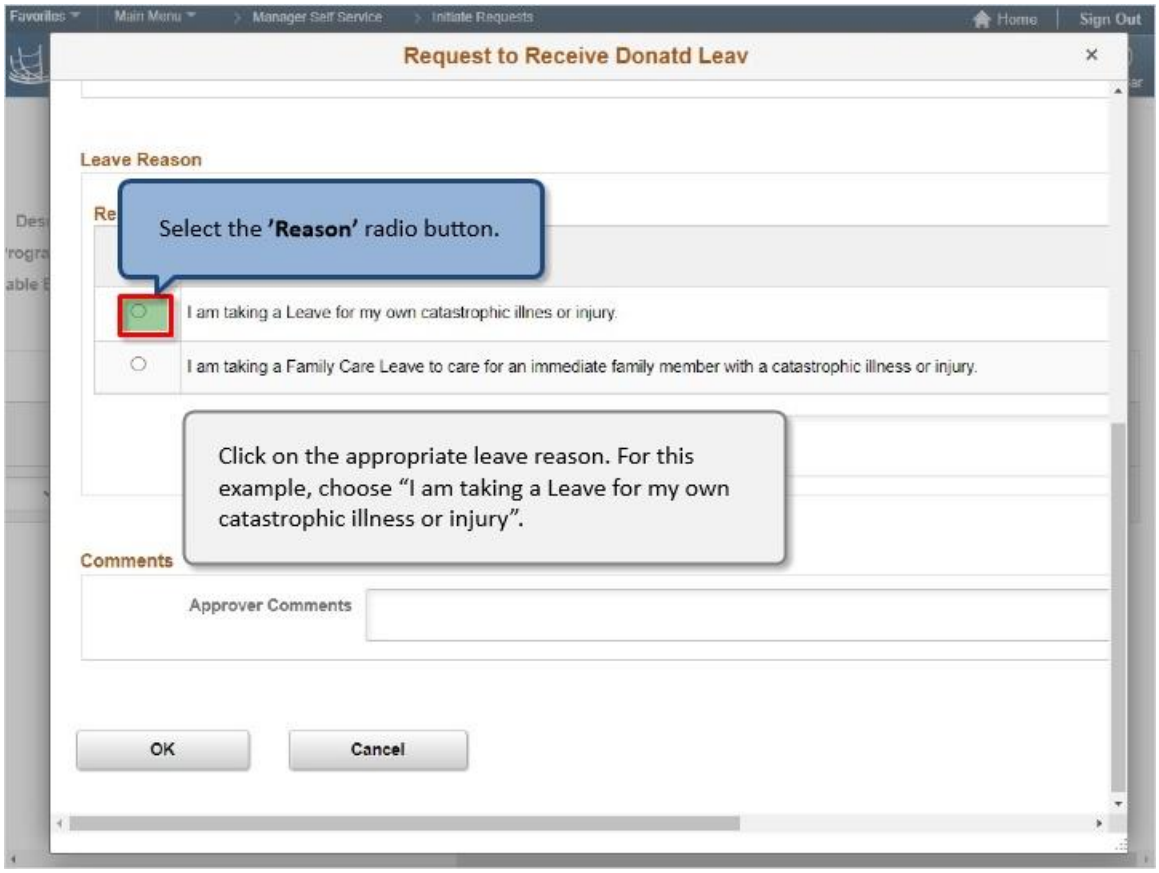


The employee's balances will display. After reviewing the balances return to the receive donated leave request screen.

Click the **'Return to Receive Donated Leave Request'.**

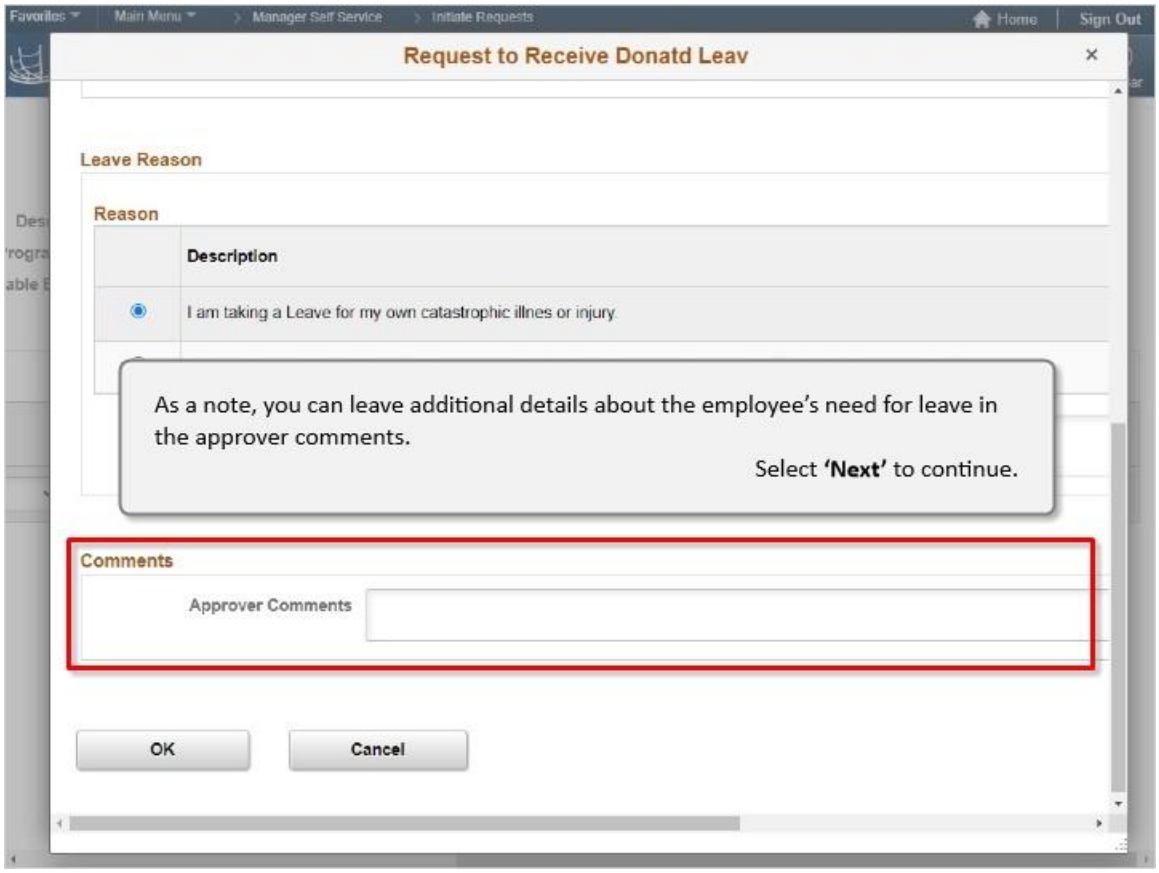


Click the **scroll bar**.

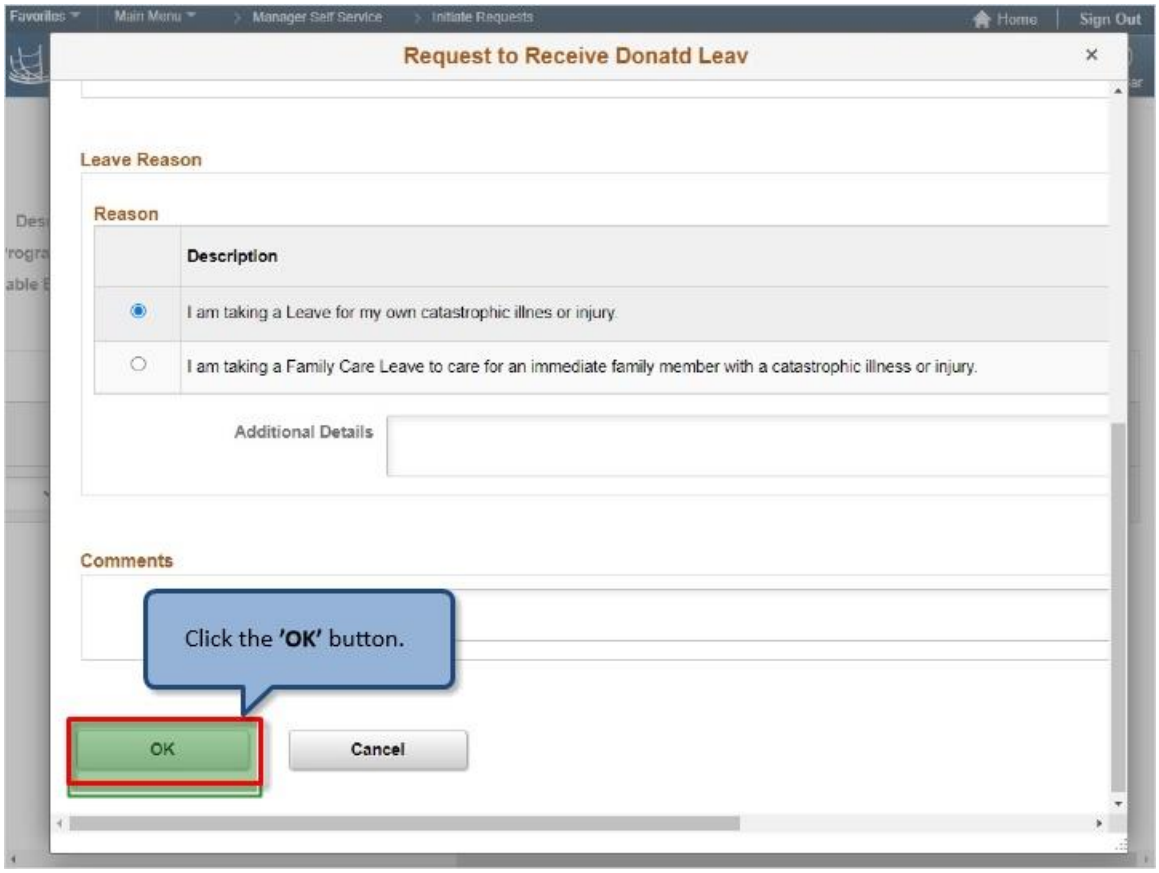


Click on the appropriate leave reason. For this example, choose “I am taking a Leave for my own catastrophic illness or injury”.

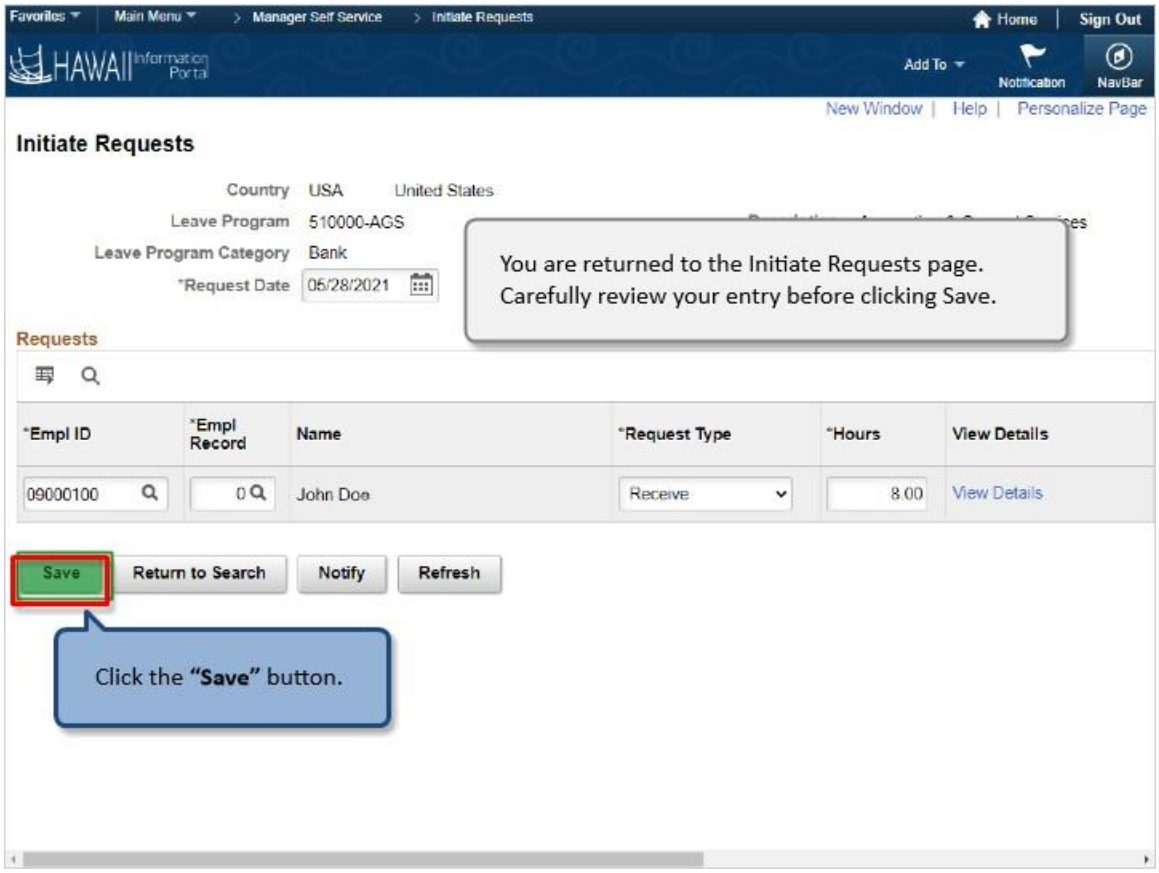
Select the **’Reason’** radio button.



As a note, you can leave additional details about the employee's need for leave in the approver comments.



Click the **'OK'** button.



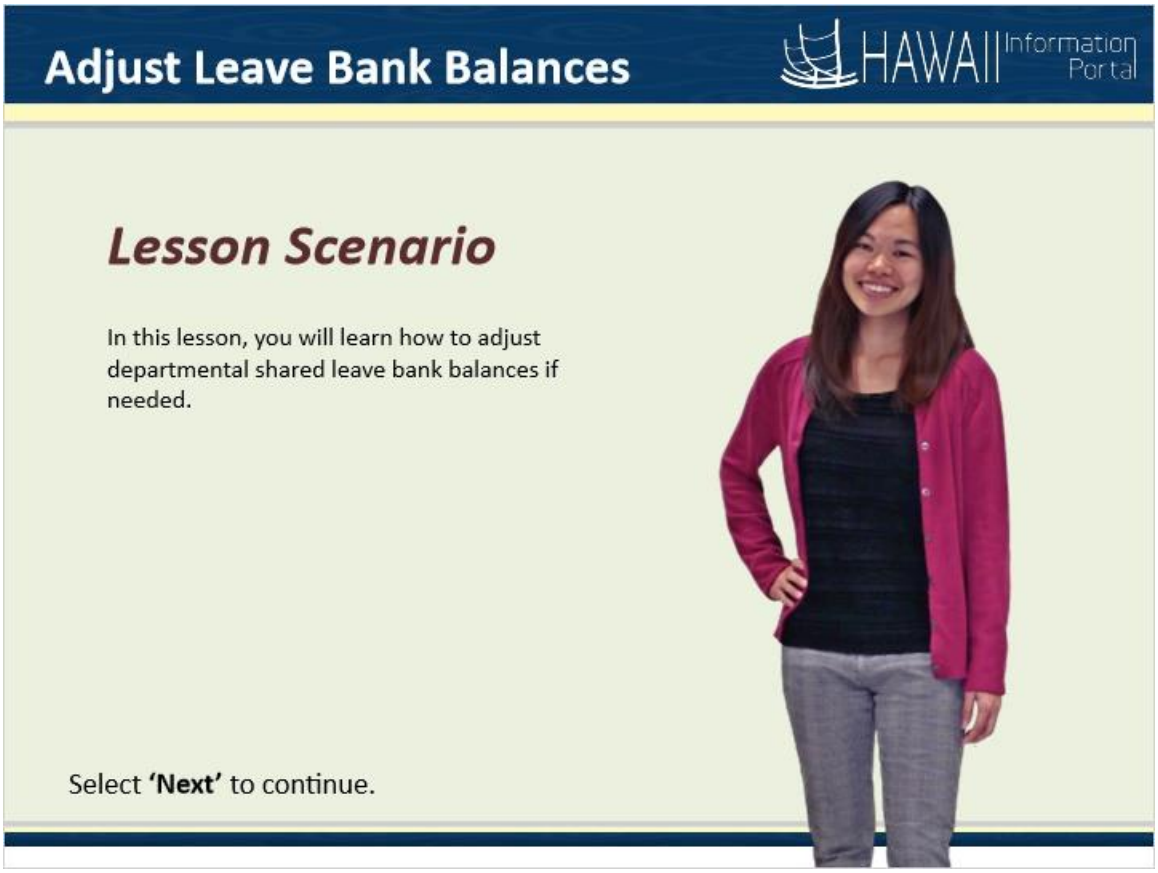
You are returned to the Initiate Requests page. Carefully review your entry before clicking Save.

Click the **"Save"** button.

Congratulations!

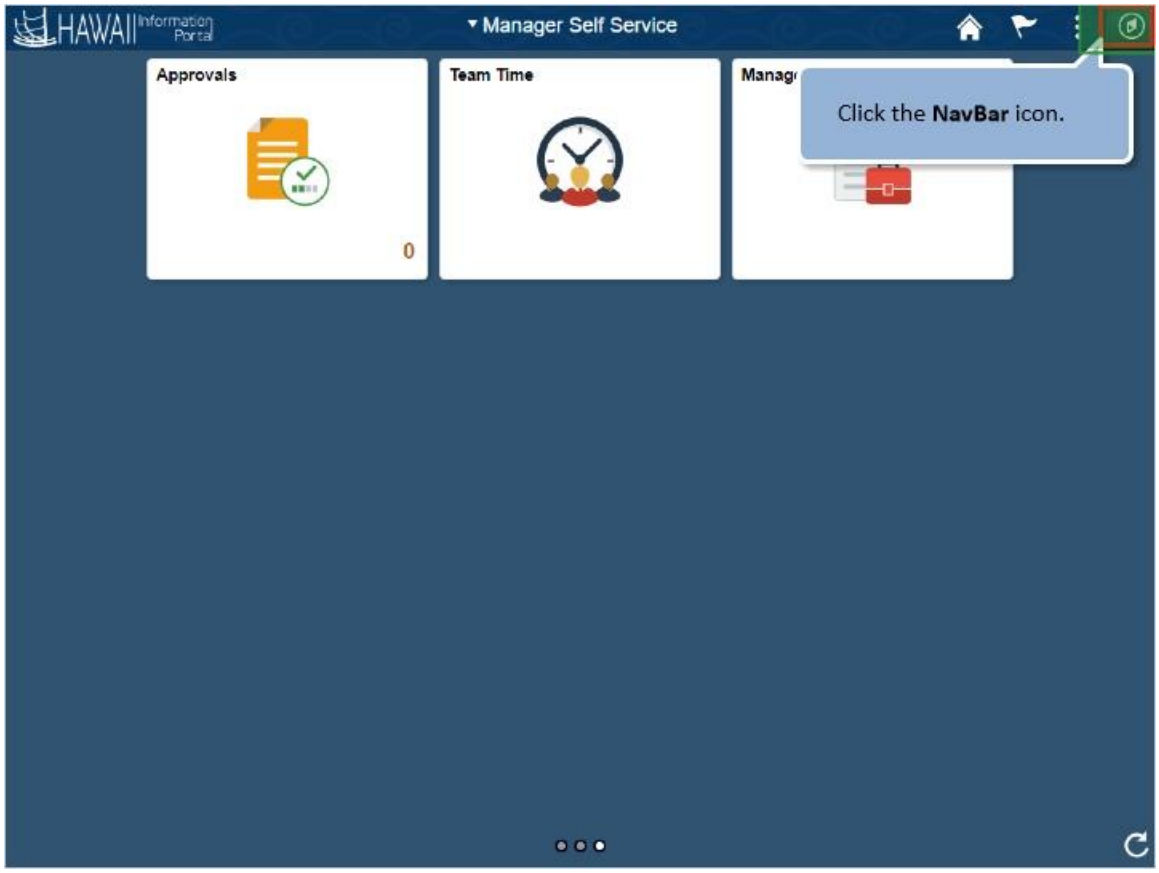
You've successfully completed this lesson.

ADJUST LEAVE BANK BALANCES

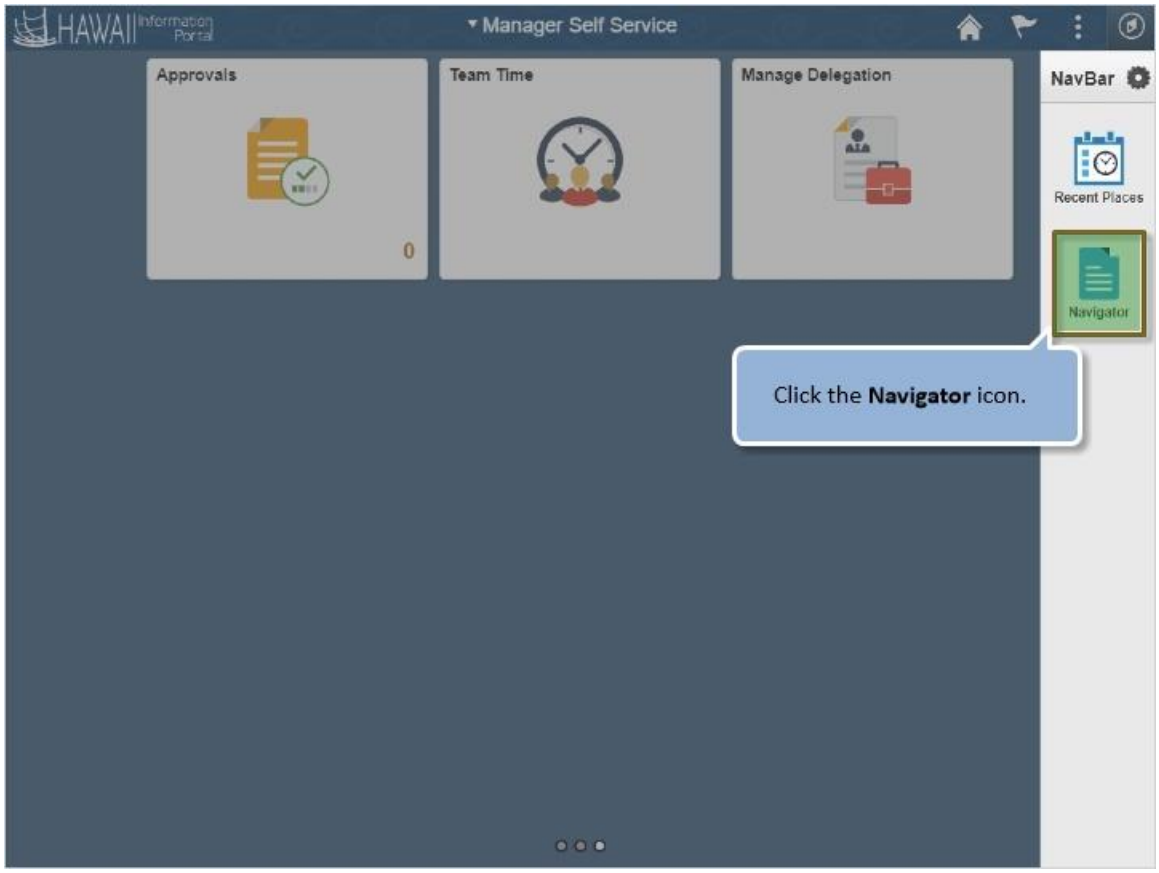


Lesson Scenario

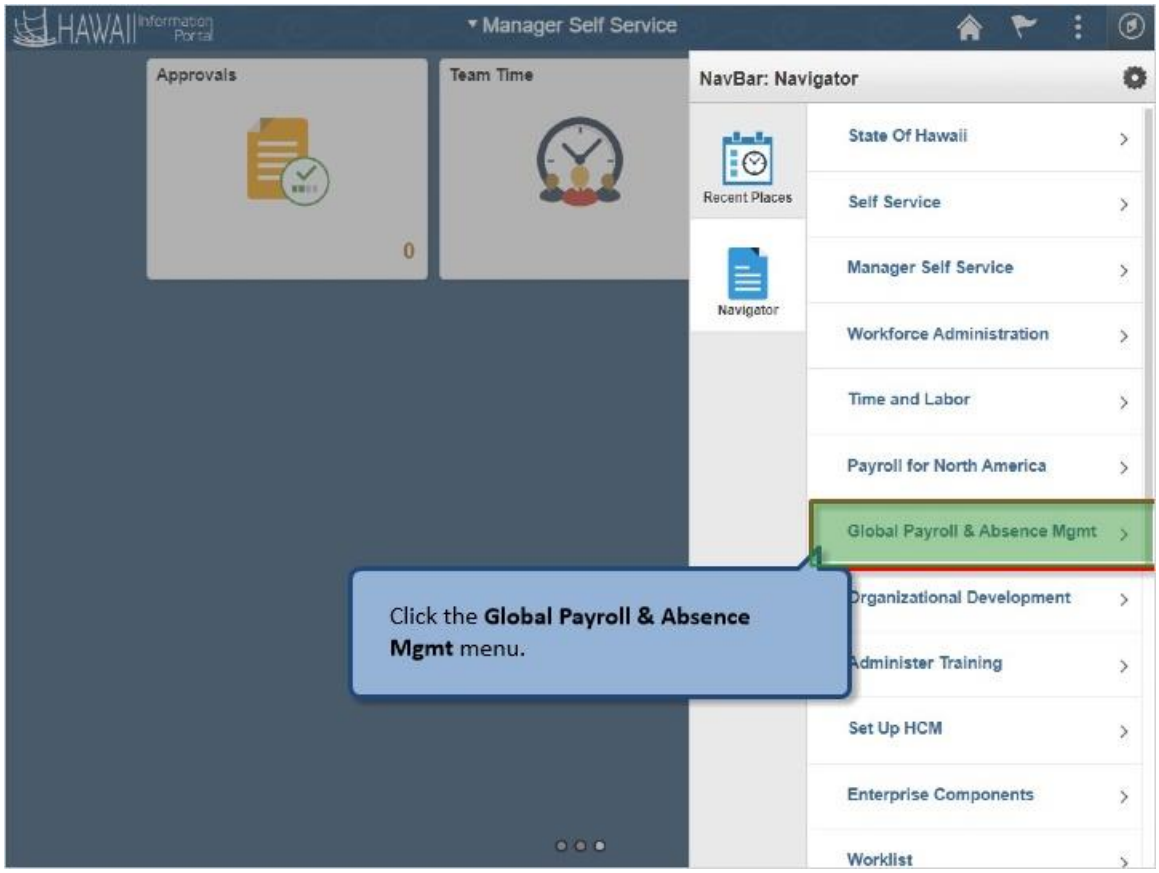
In this lesson, you will learn how to adjust departmental shared leave bank balances if needed.



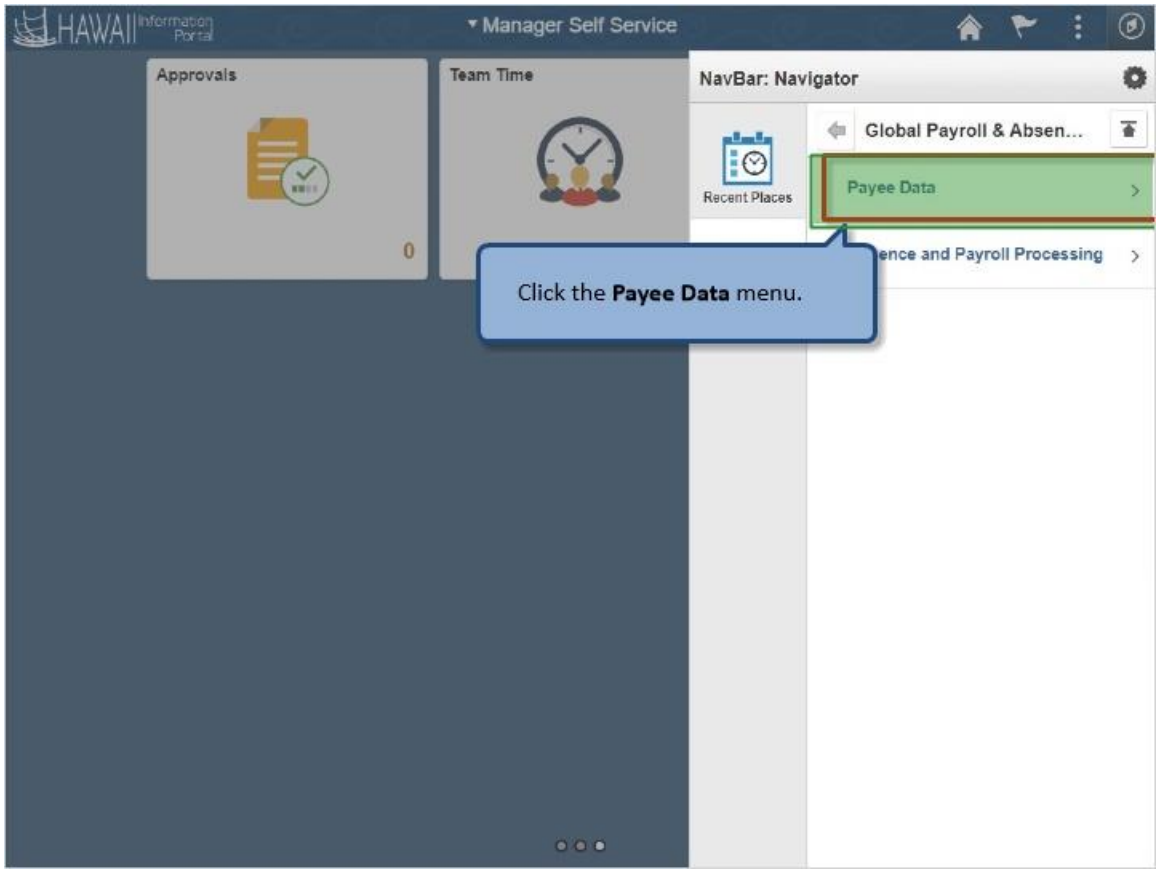
Click the **NavBar** icon.



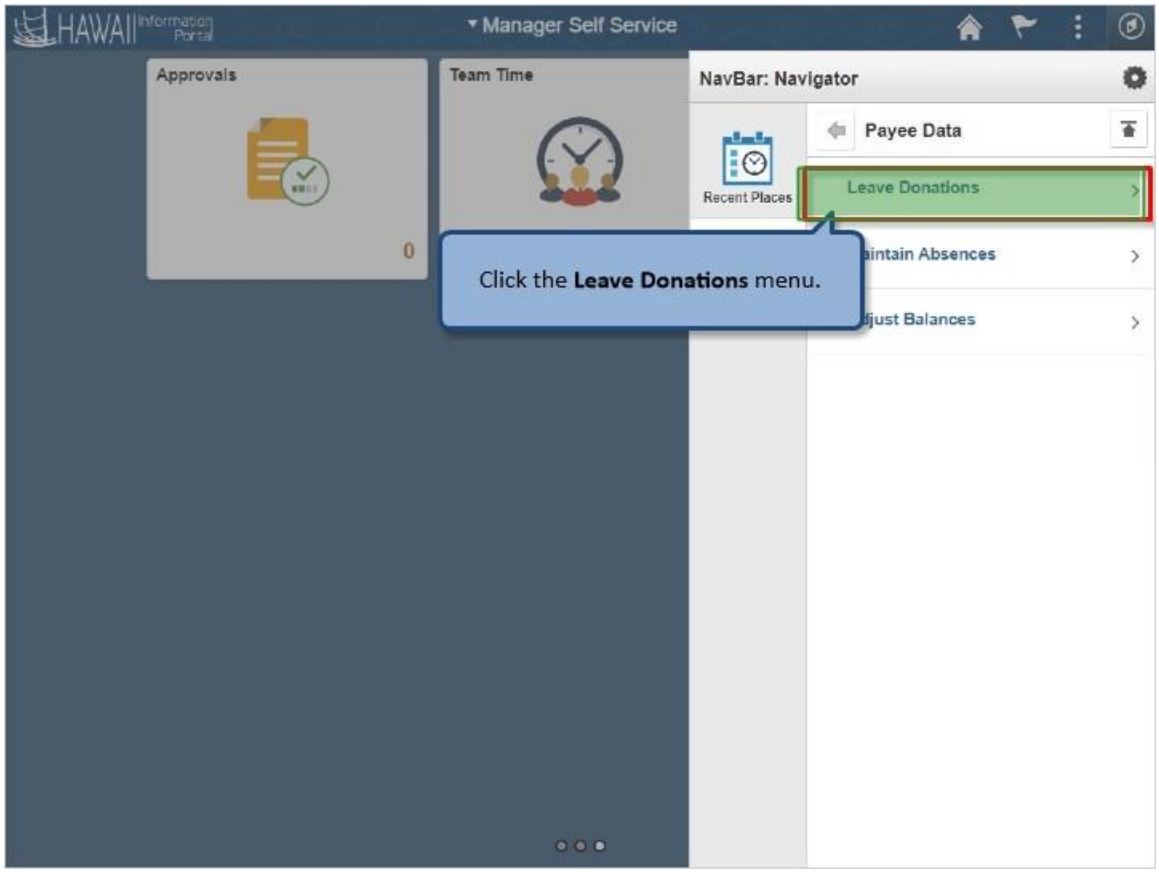
Click the **Navigator** icon.



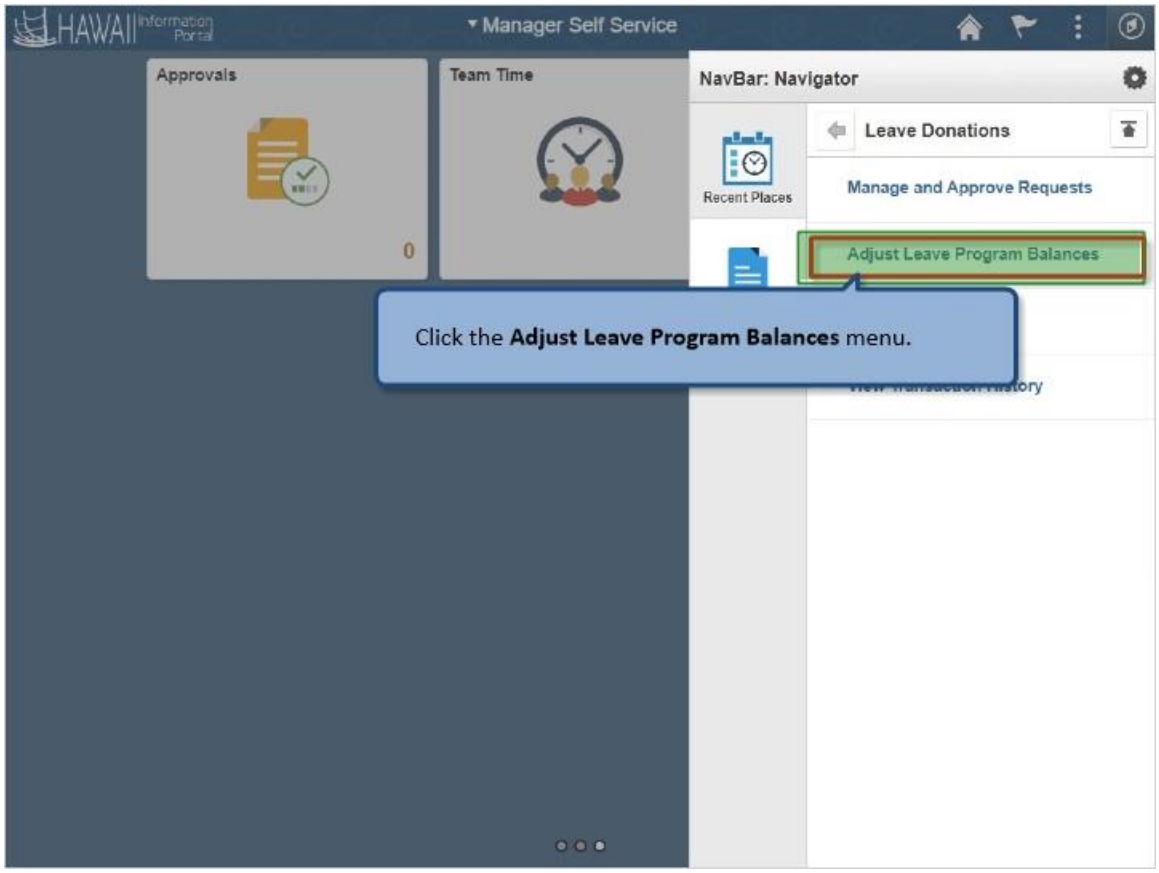
Click the **Global Payroll & Absence Mgmt** menu.



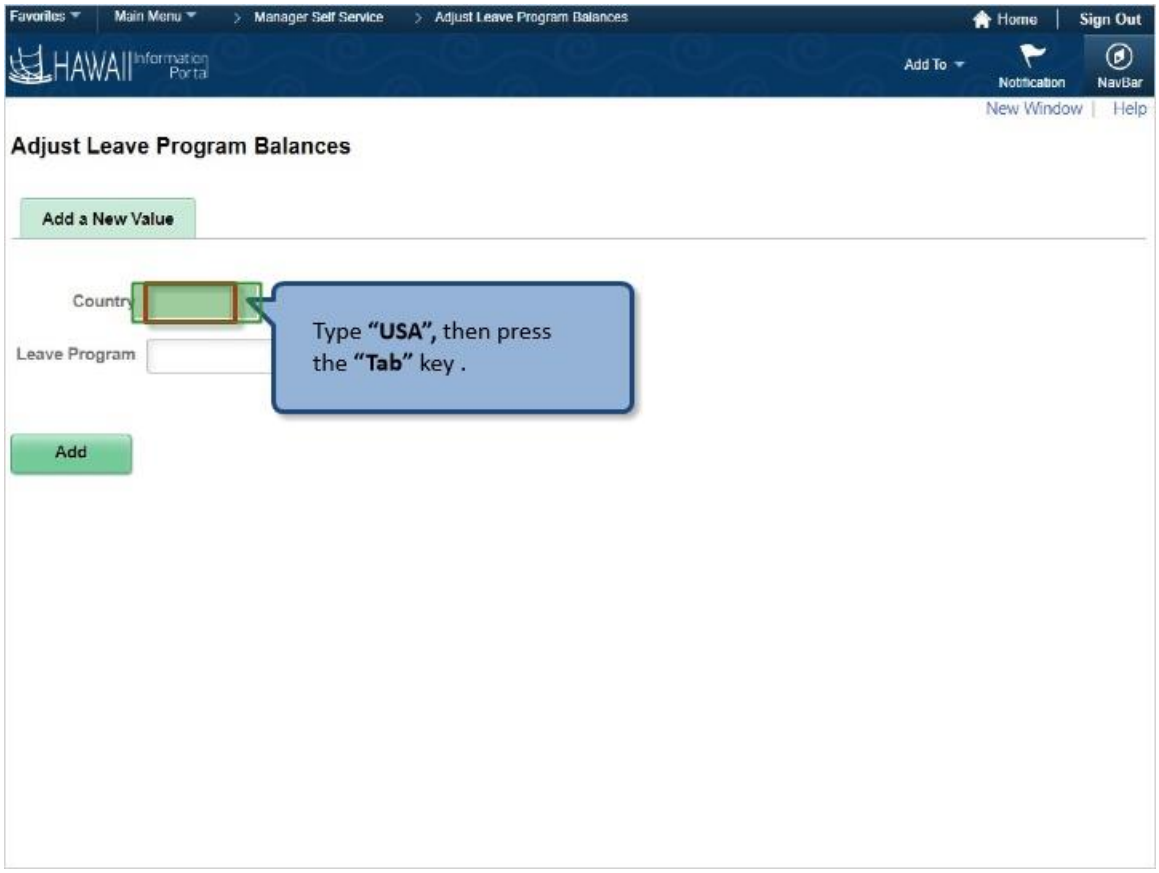
Click the **Payee Data** menu.



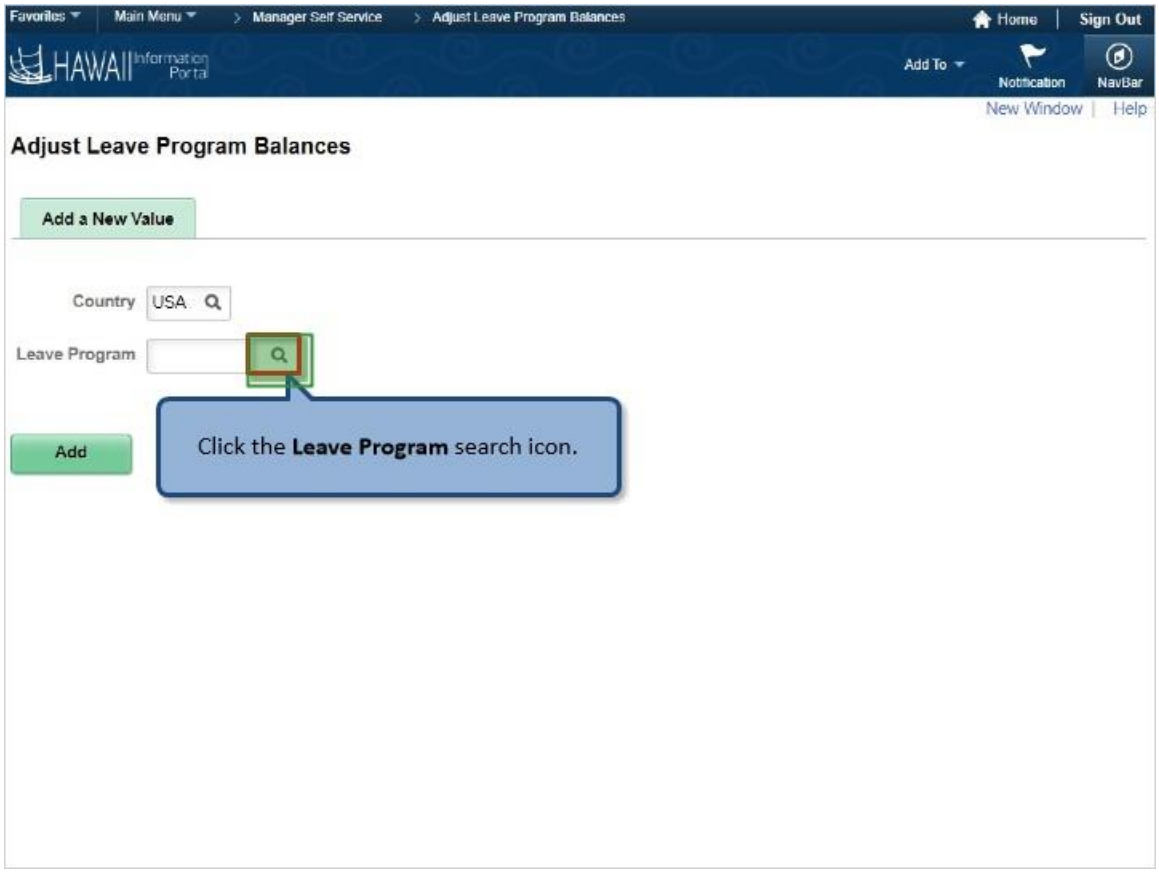
Click the **Leave Donations** menu.



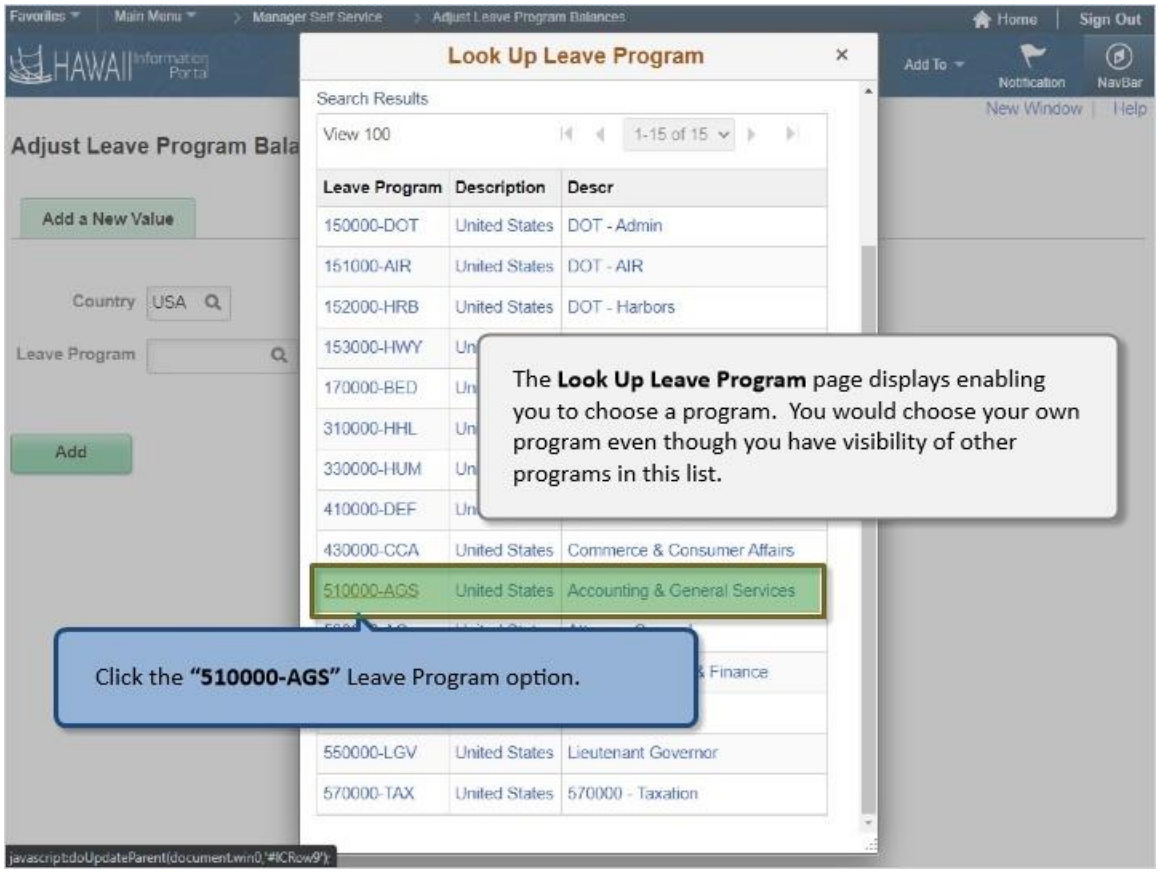
Click the **Adjust Leave Program Balances** menu.



Type **"USA",** then press the **"Tab"** key .

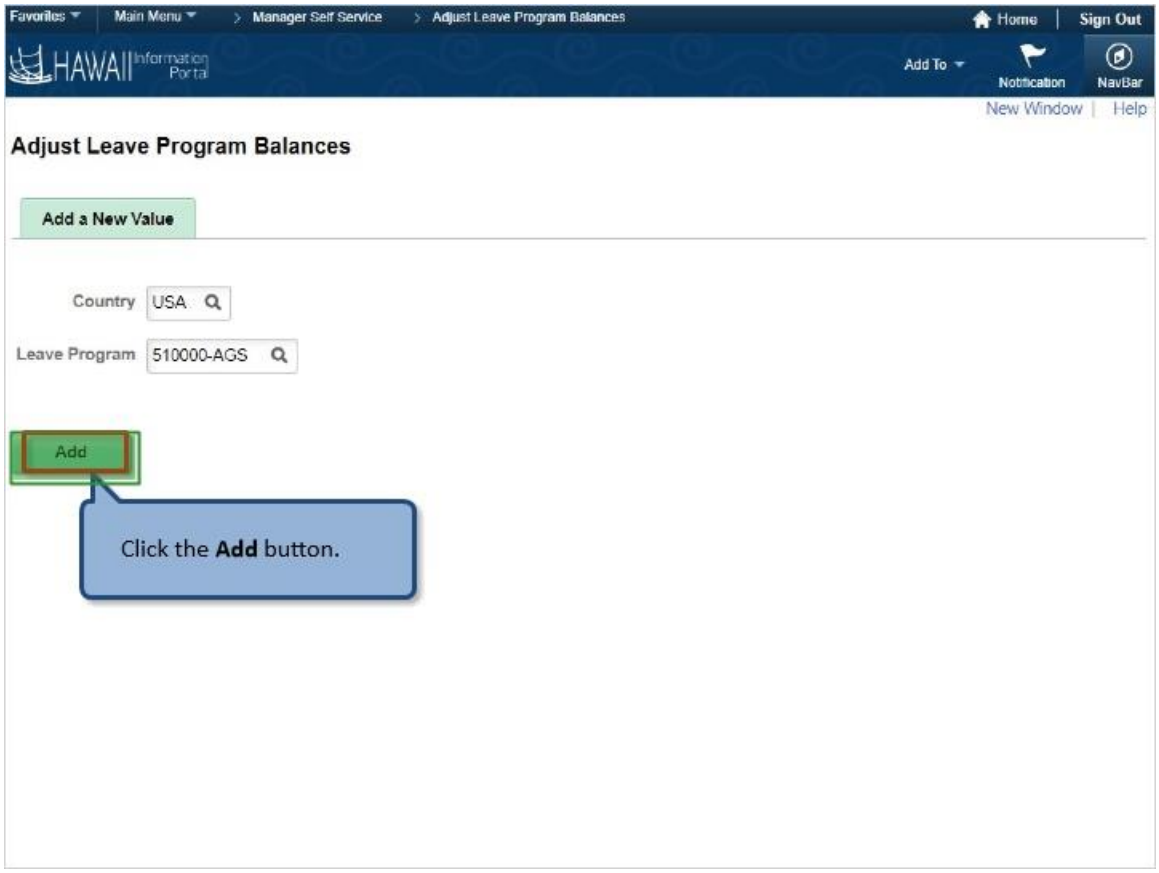


Click the **Leave Program** search icon.

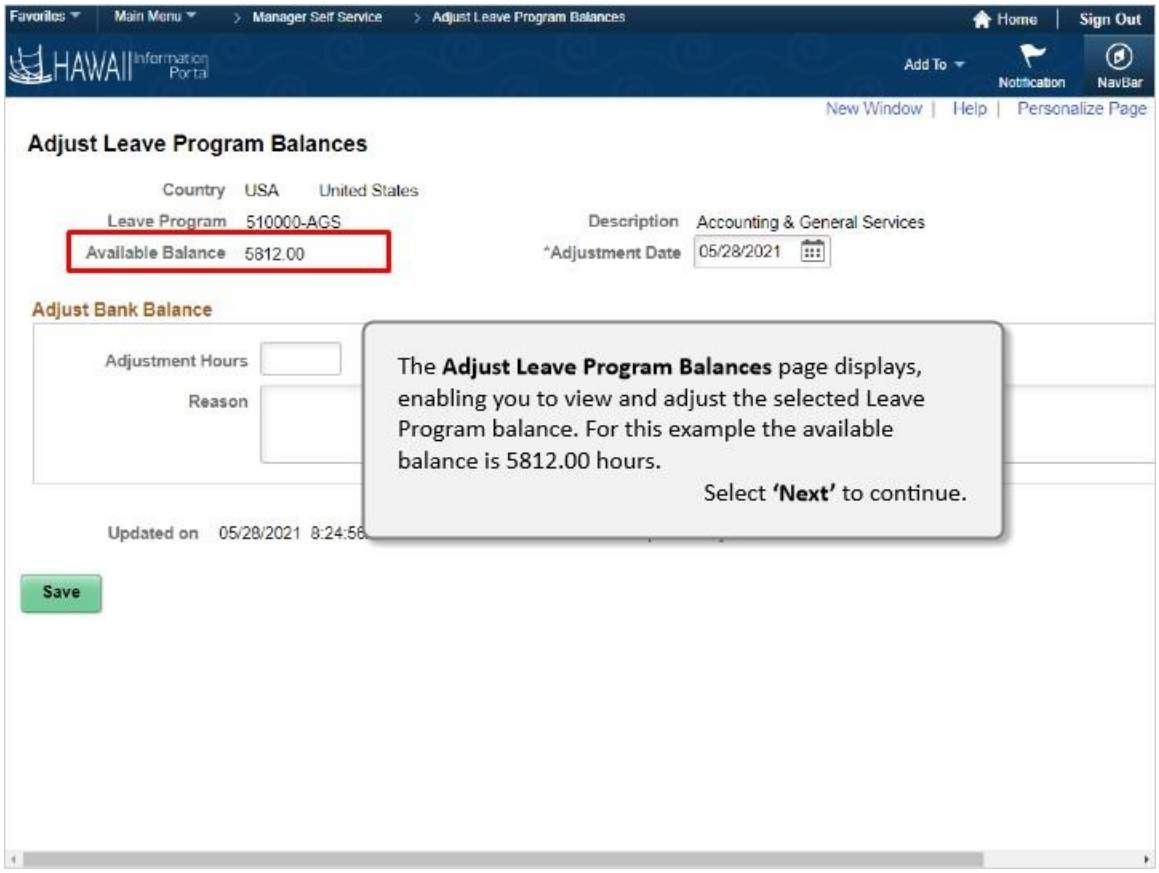


The **Look Up Leave Program** page displays enabling you to choose a program. You would choose your own program even though you have visibility of other programs in this list.

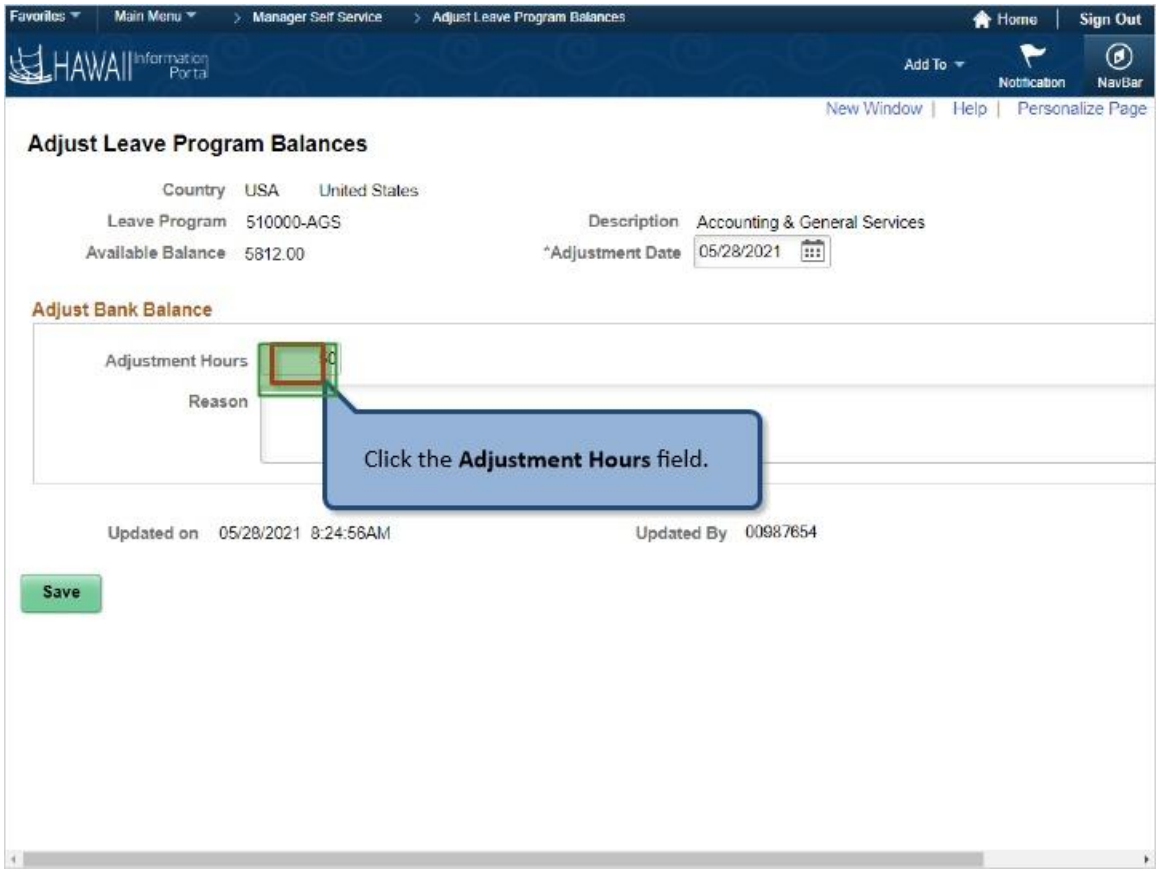
Click the **"510000-AGS"** Leave Program option.



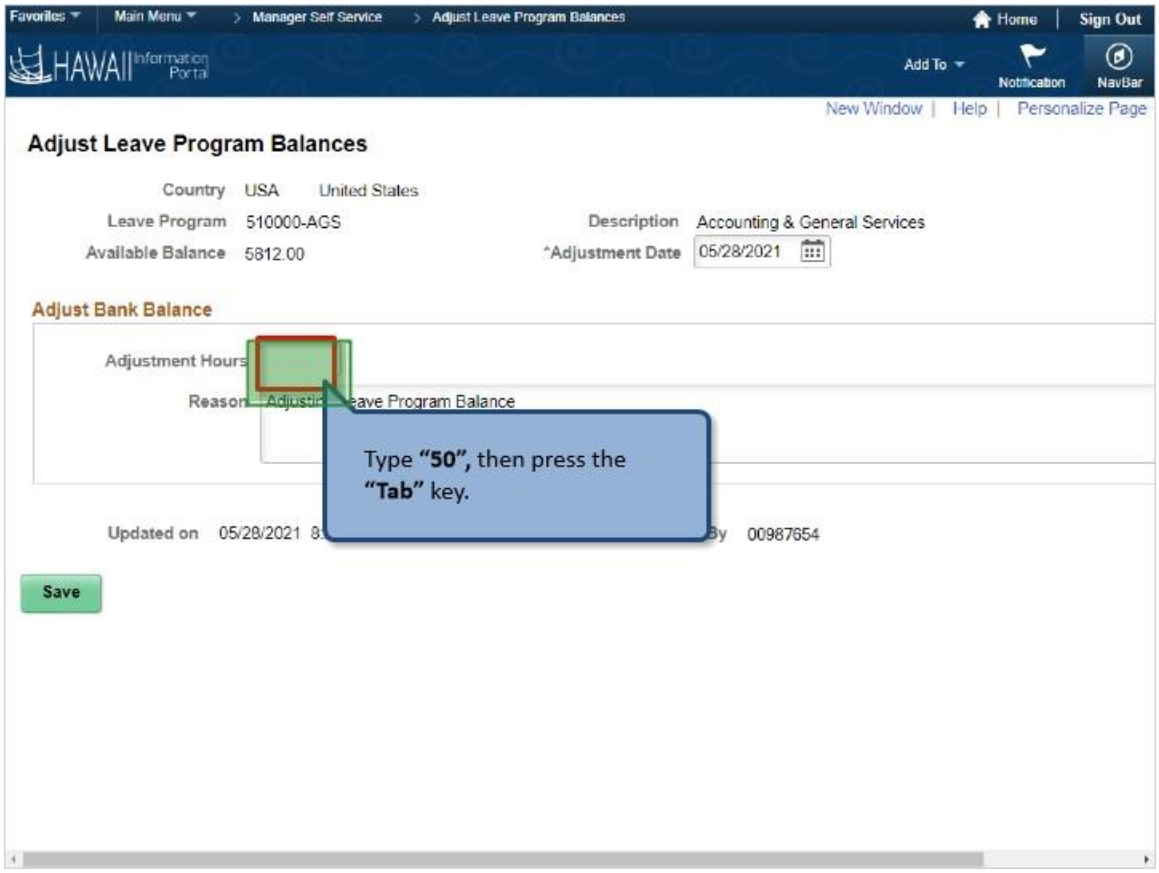
Click the **Add** button.



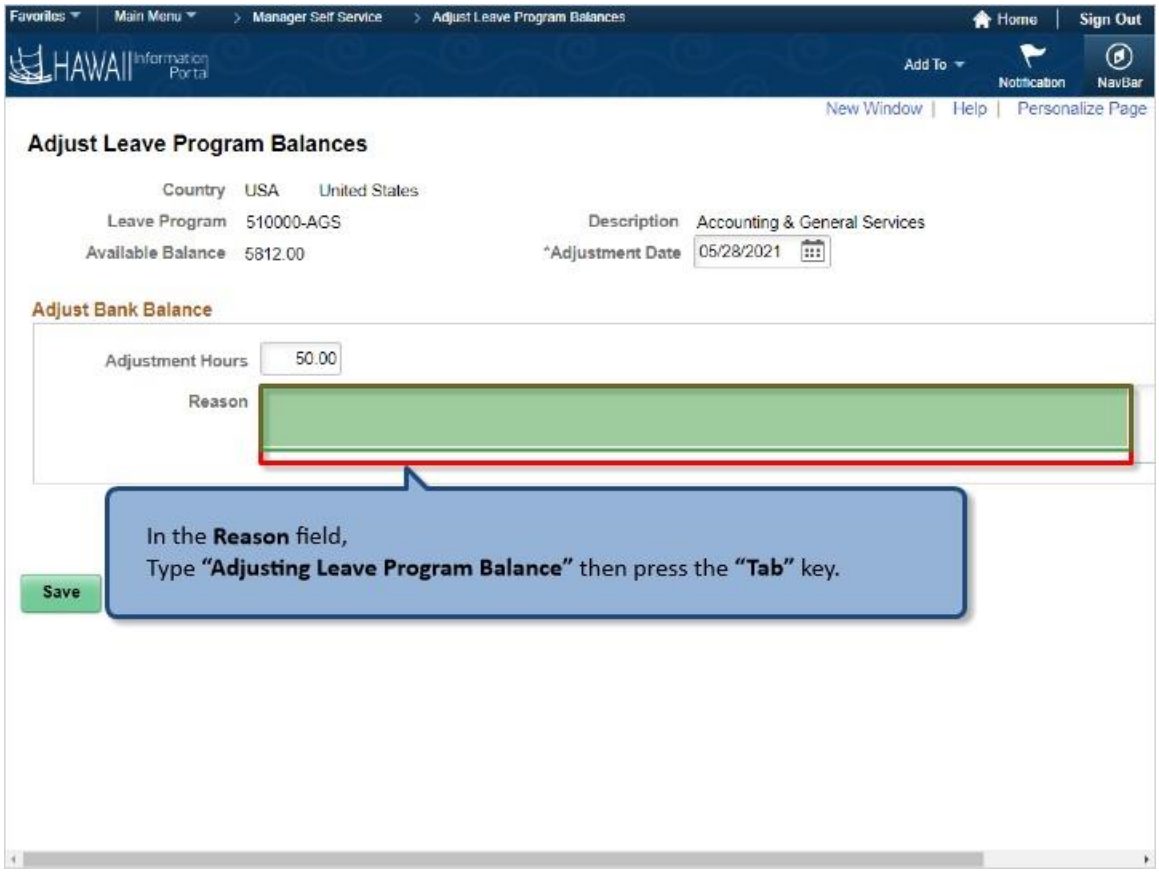
The **Adjust Leave Program Balances** page displays, enabling you to view and adjust the selected Leave Program balance. For this example the available balance is 5812.00 hours.



Click the **Adjustment Hours** field.

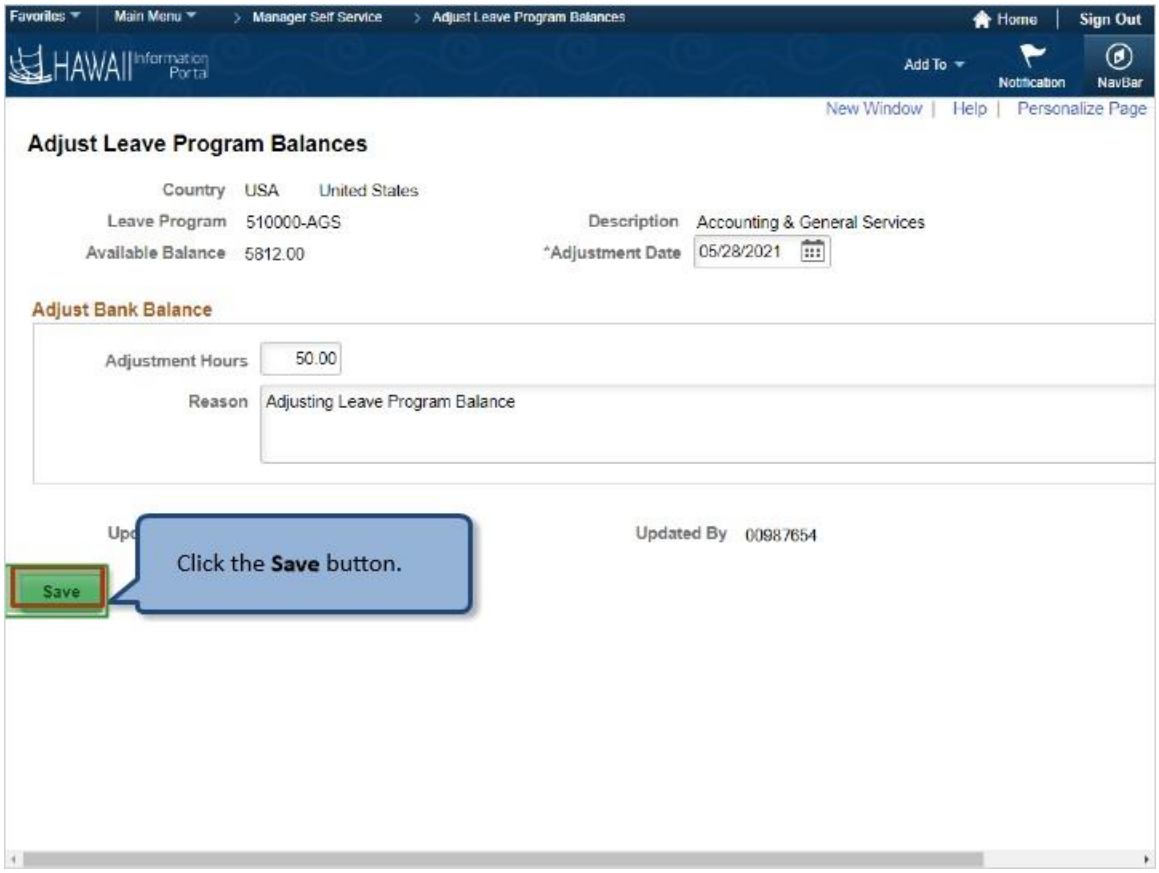


Type **"50",** then press the **"Tab"** key.

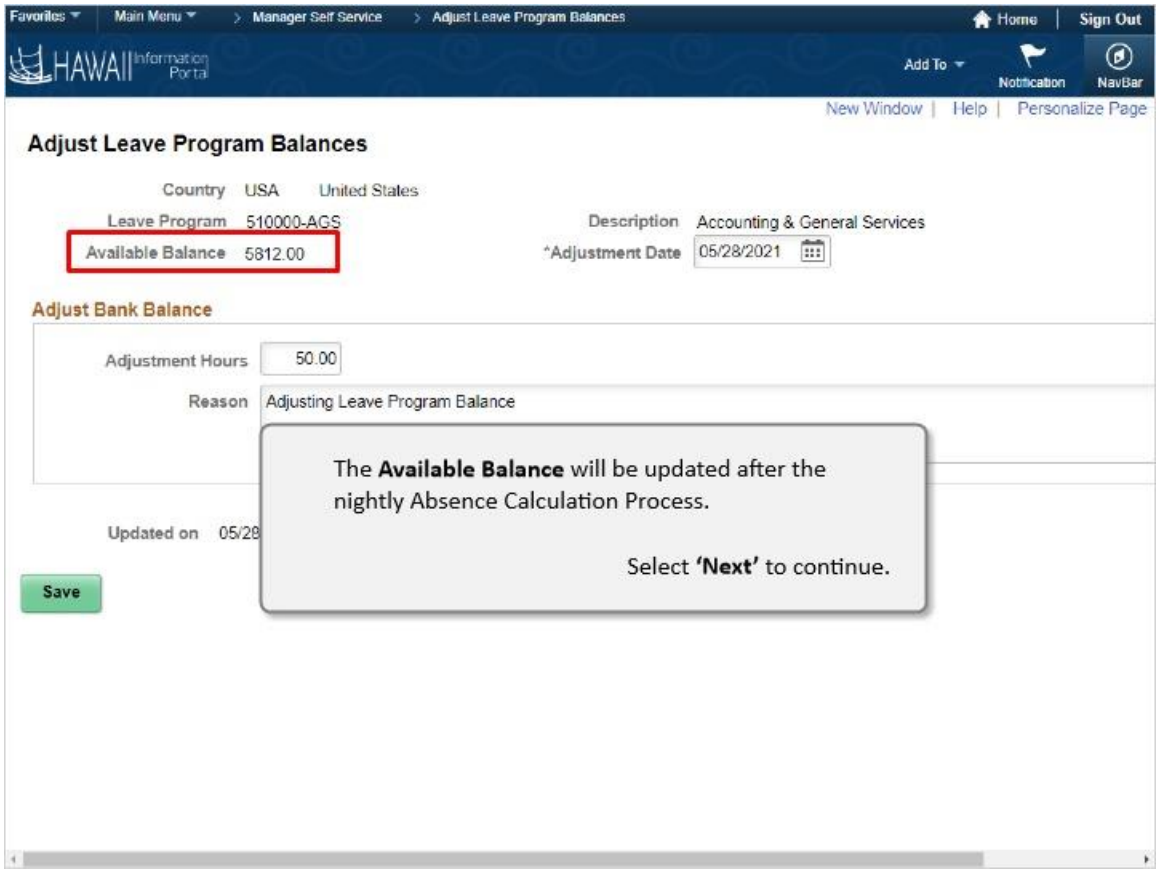


In the **Reason** field,

Type **"Adjusting Leave Program Balance"** then press the **"Tab"** key.



Click the **Save** button.

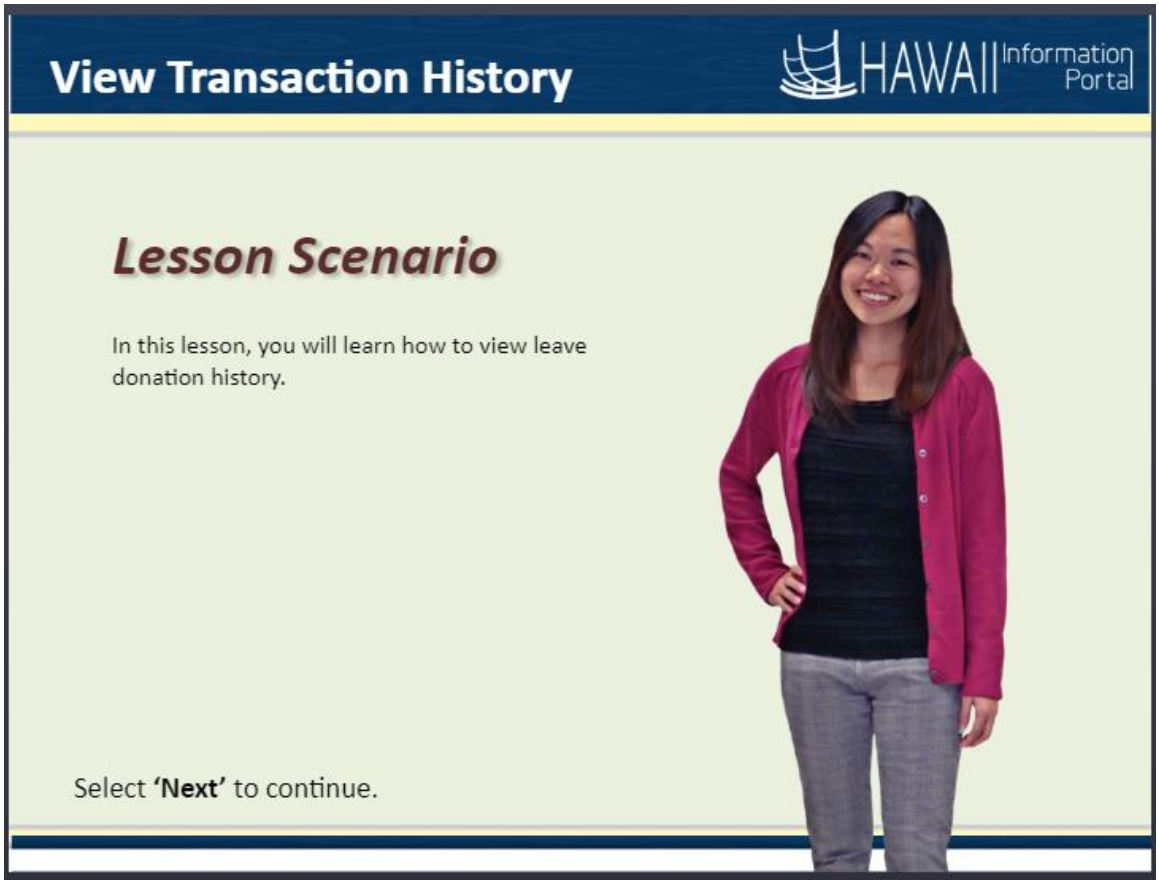


The **Available Balance** will be updated after the nightly Absence Calculation Process.

Congratulations!

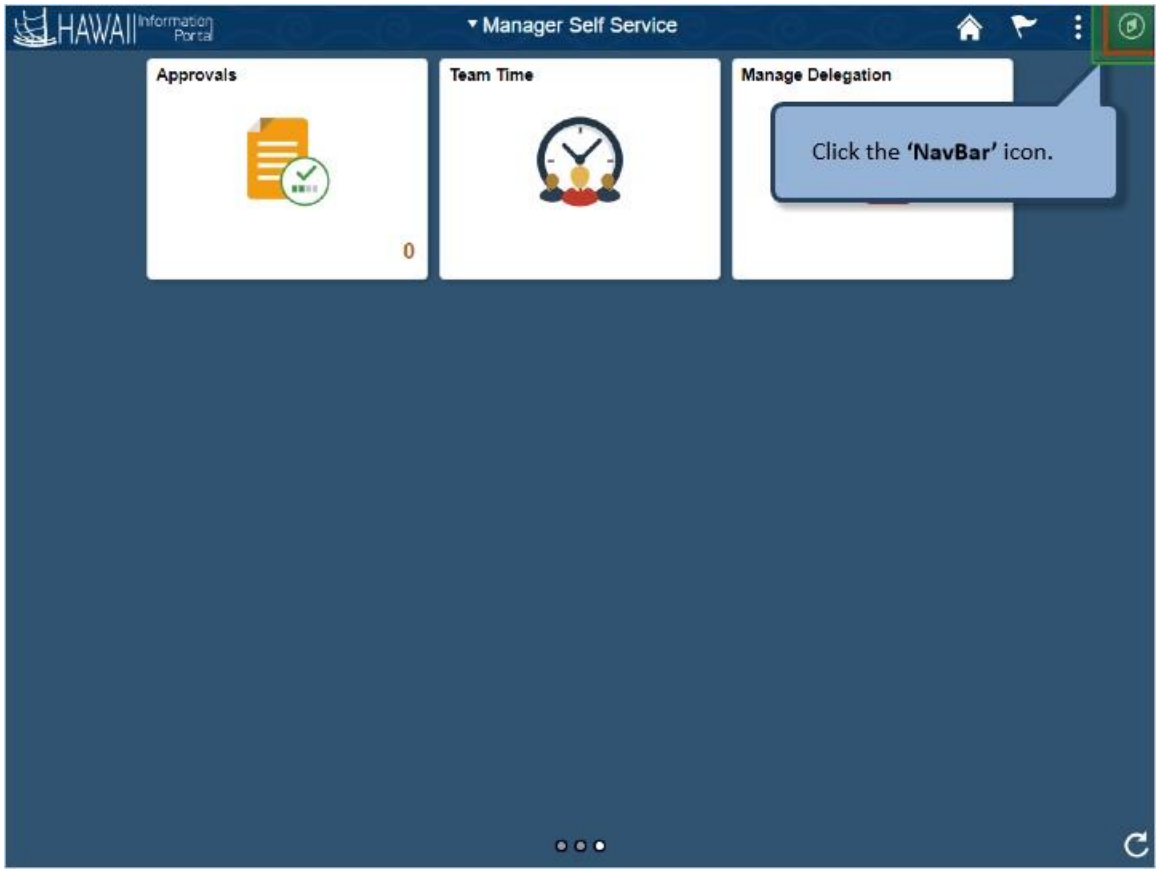
You've successfully completed this lesson.

VIEW TRANSACTION HISTORY

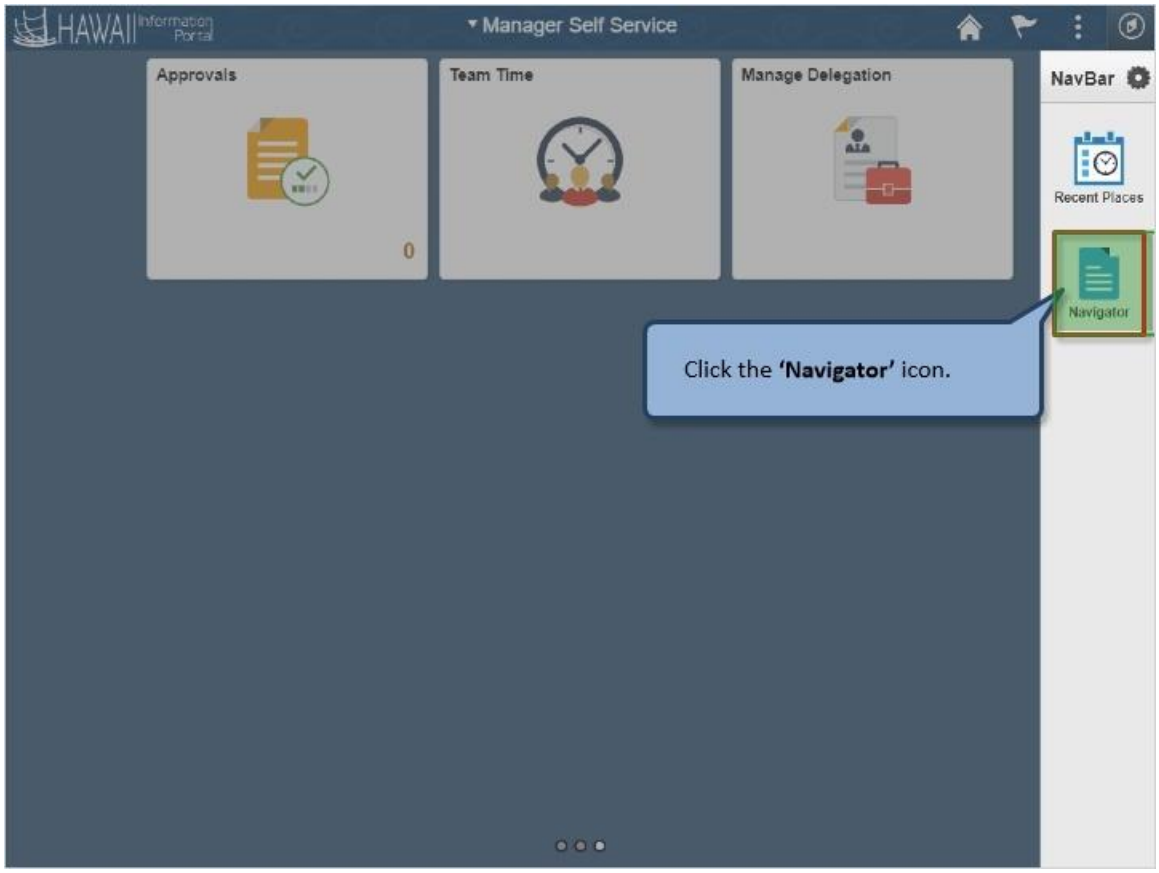


Lesson Scenario

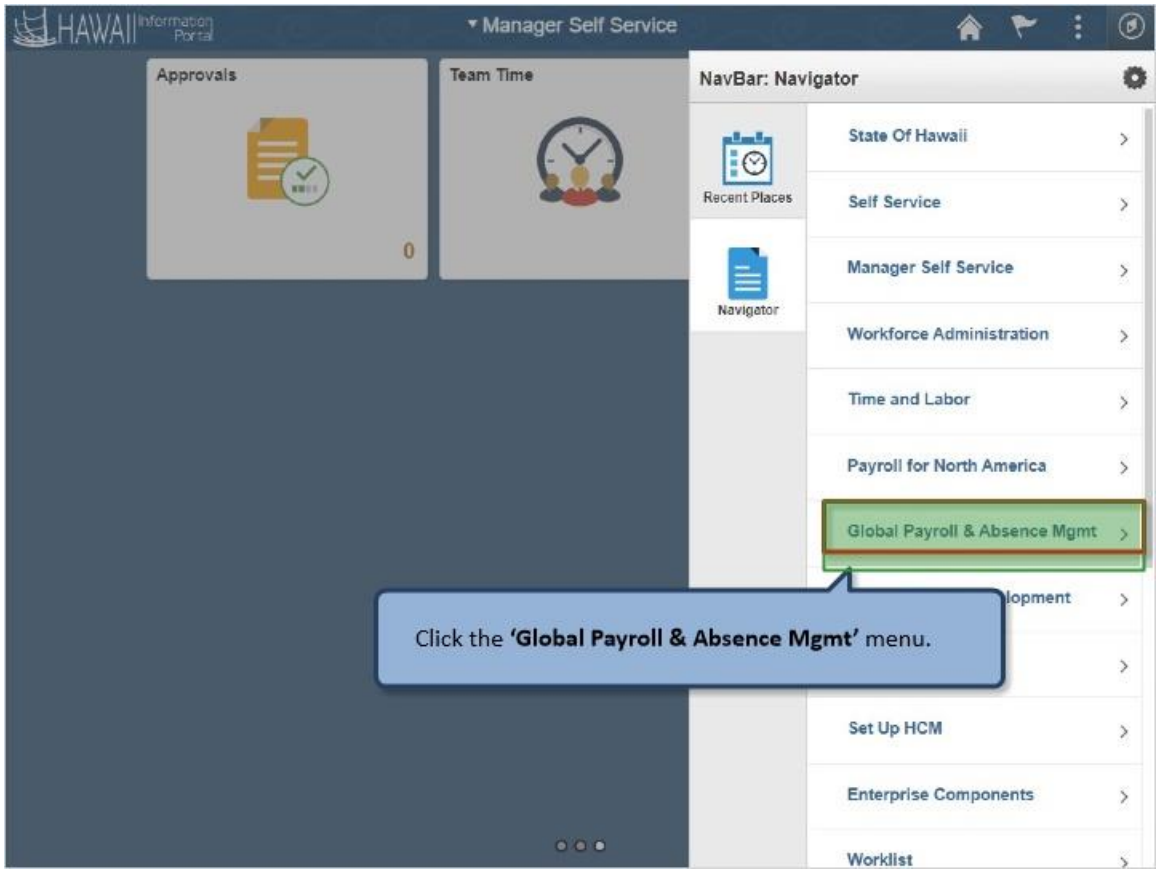
In this lesson, you will learn how to view leave donation history.



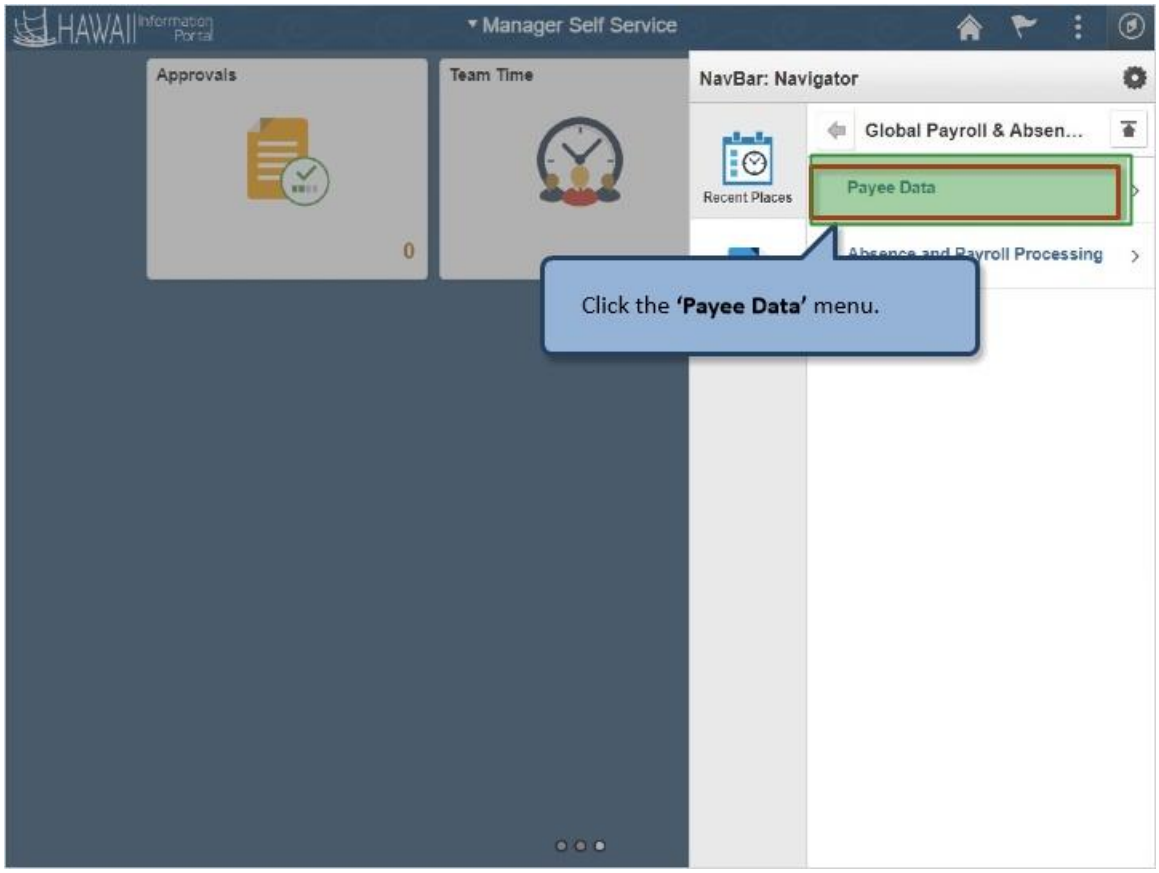
Click the **'NavBar'** icon.



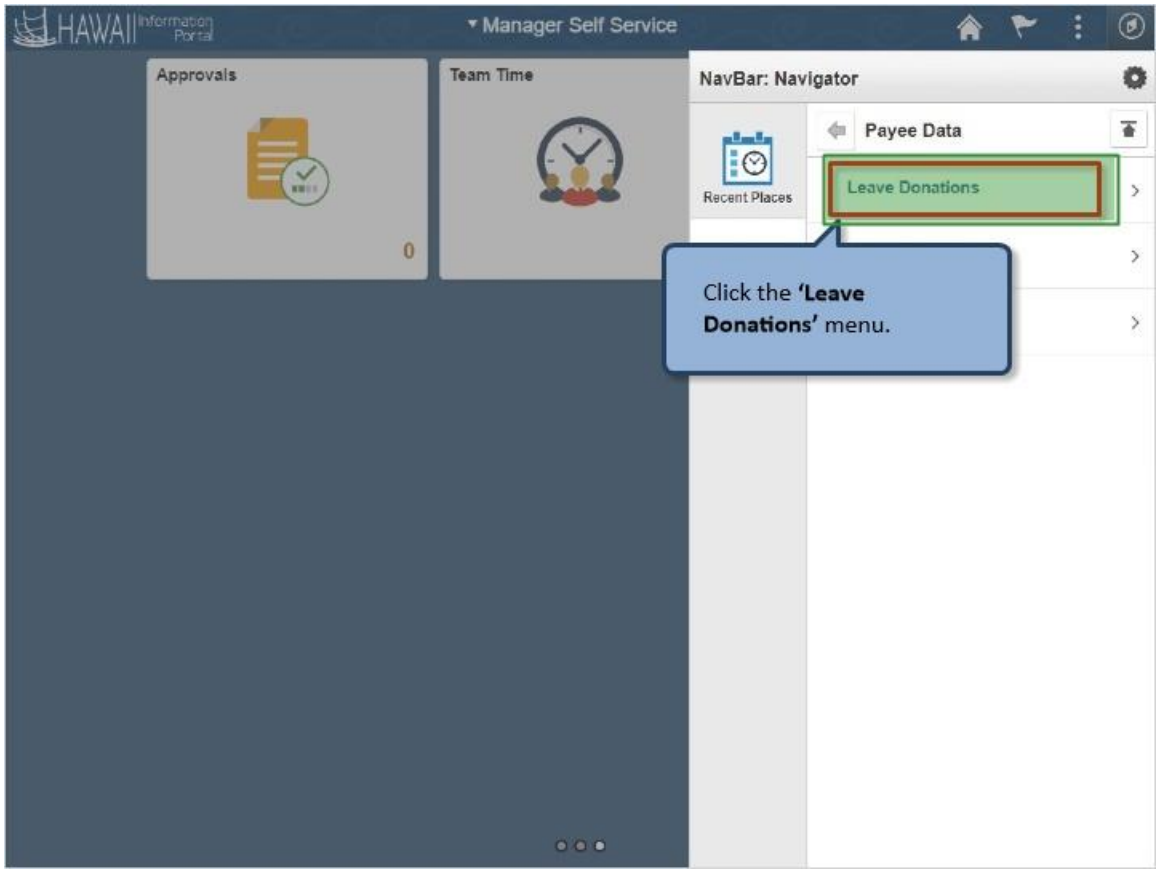
Click the **'Navigator'** icon.



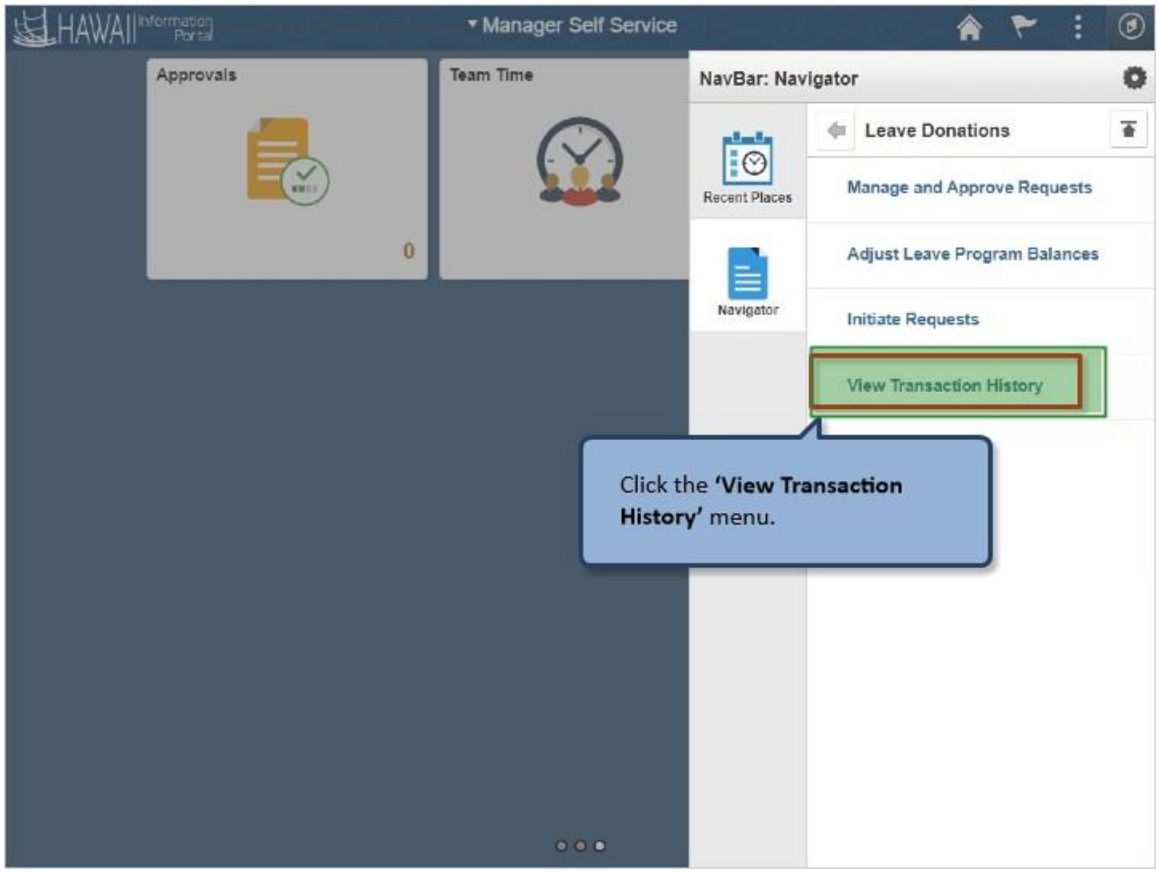
Click the **'Global Payroll & Absence Mgmt** menu.



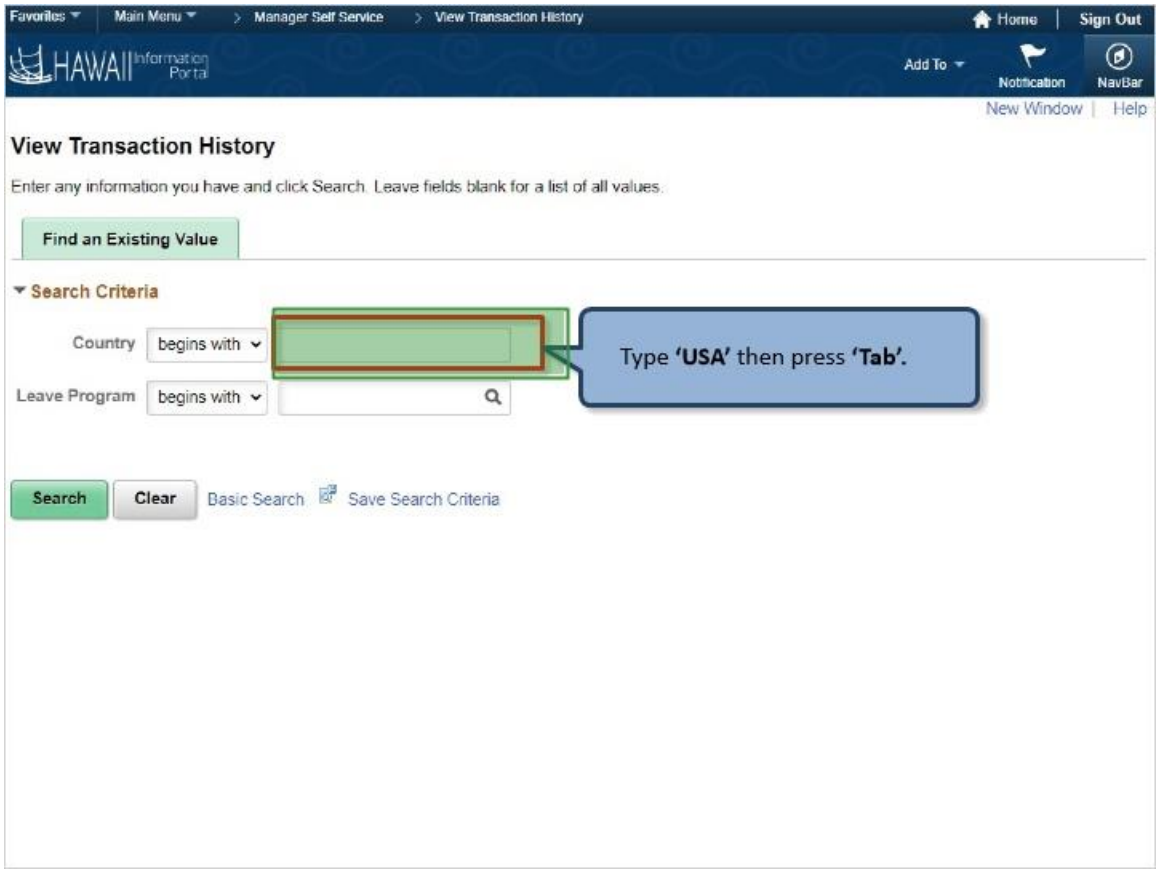
Click the **'Payee Data'** menu.



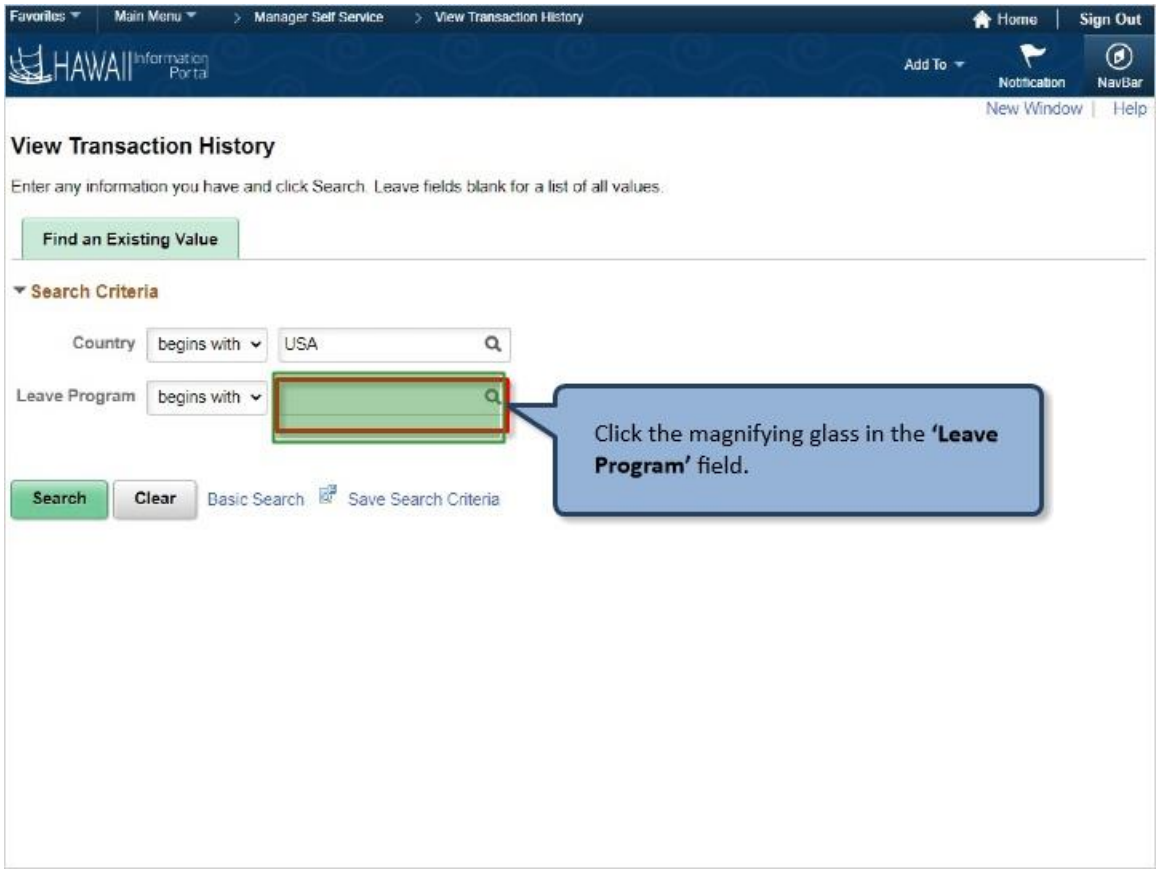
Click the **'Leave Donations'** menu.



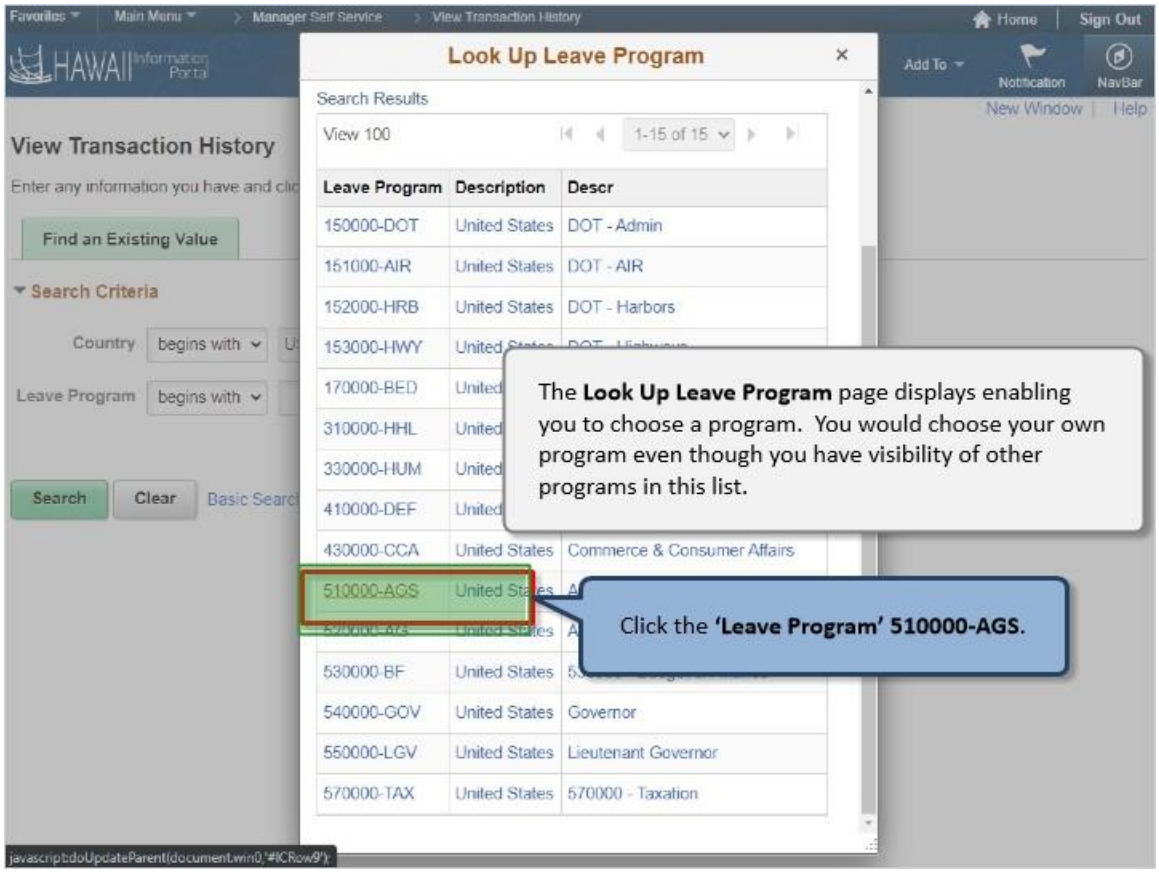
Click the **'View Transaction History'** menu.



Type **'USA'** then press **'Tab'.**

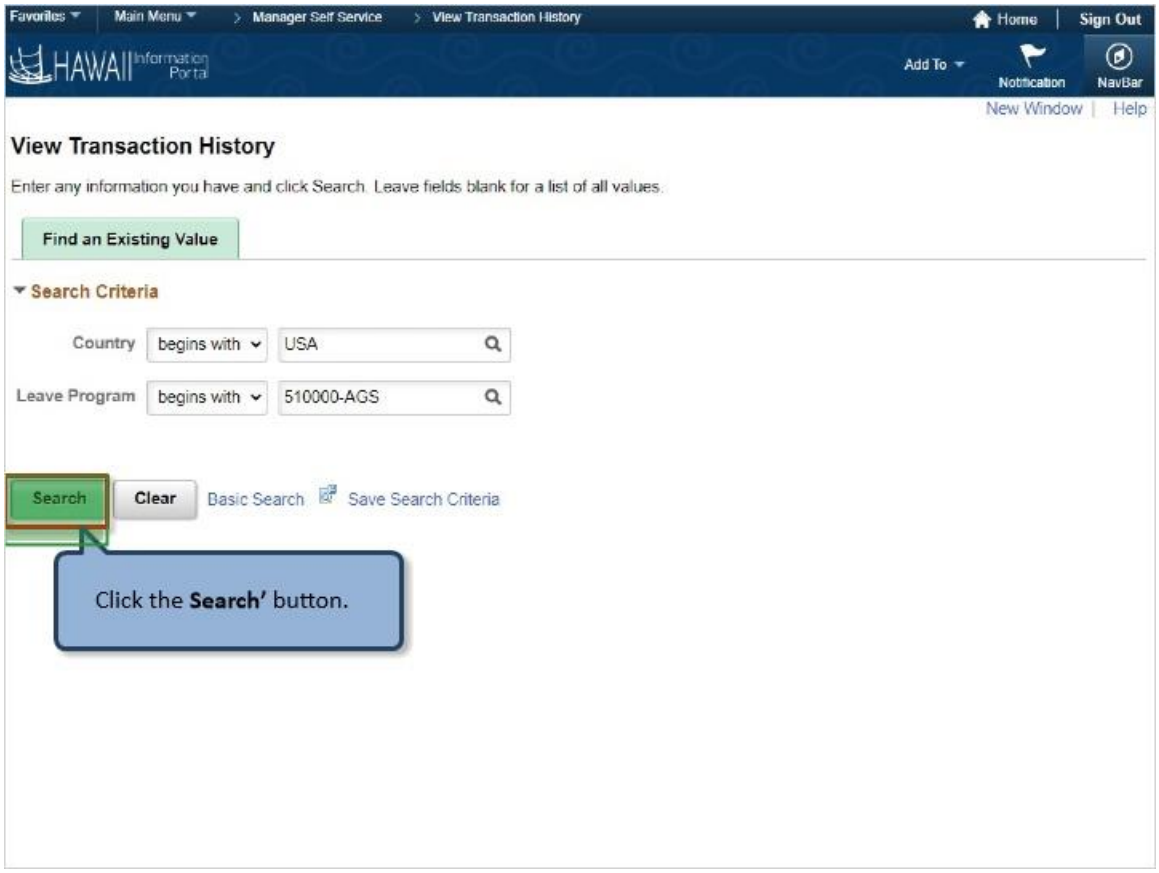


Click the magnifying glass in the **'Leave Program'** field.

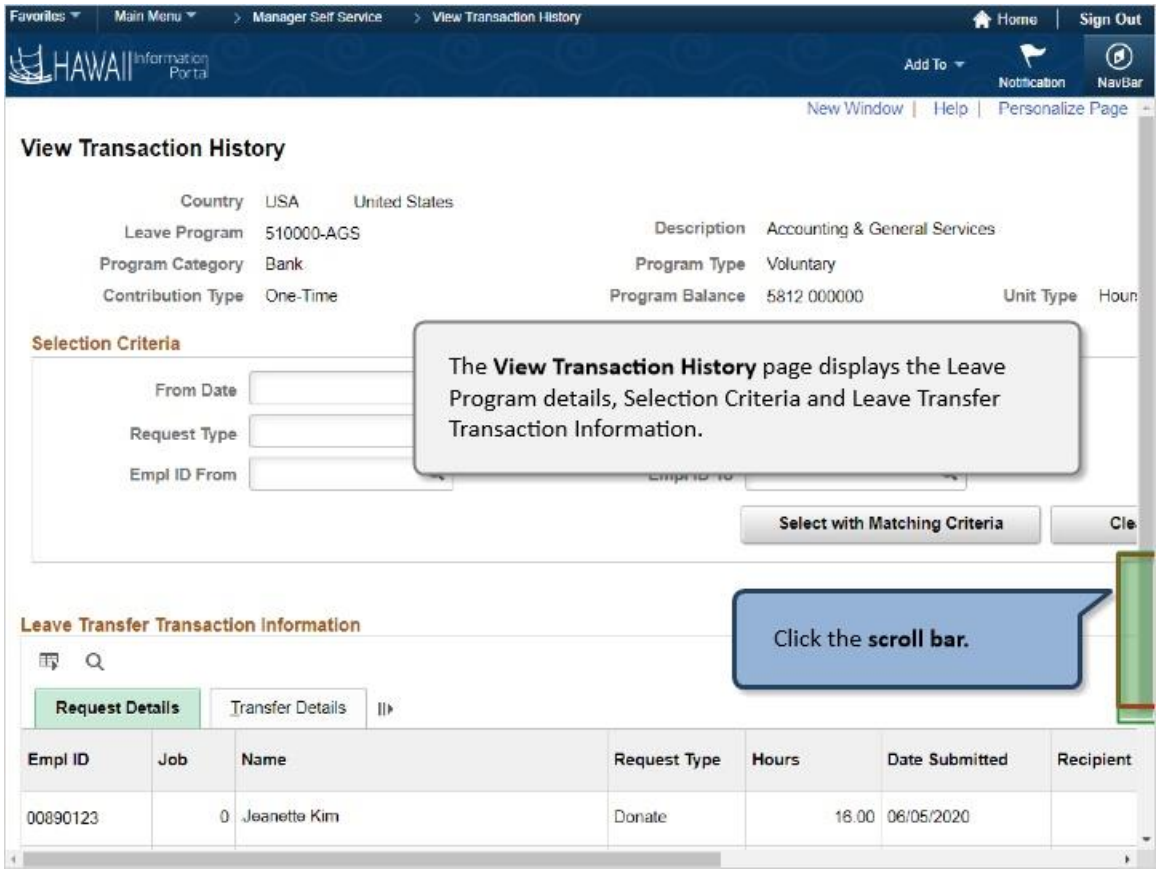


The **Look Up Leave Program** page displays enabling you to choose a program. You would choose your own program even though you have visibility of other programs in this list.

Click the **'Leave Program' 510000-AGS.**

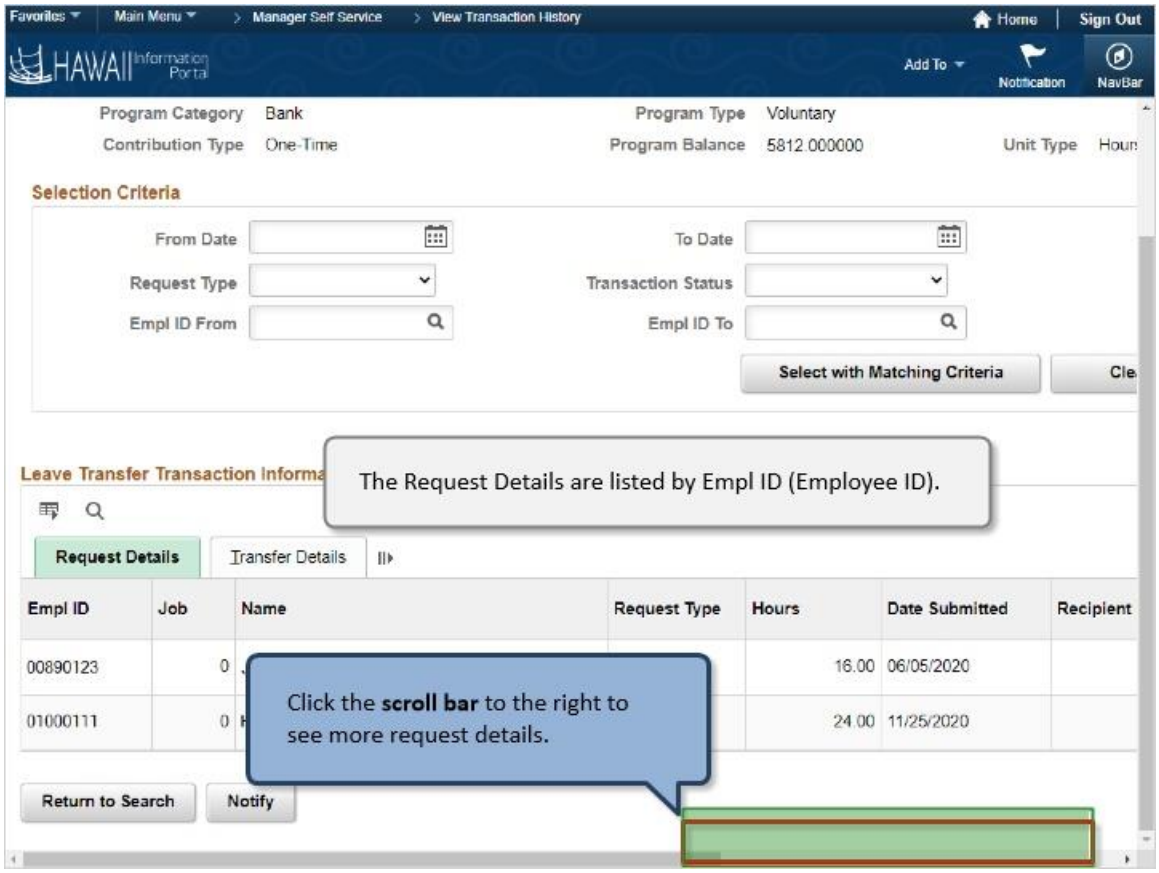


Click the **Search'** button.



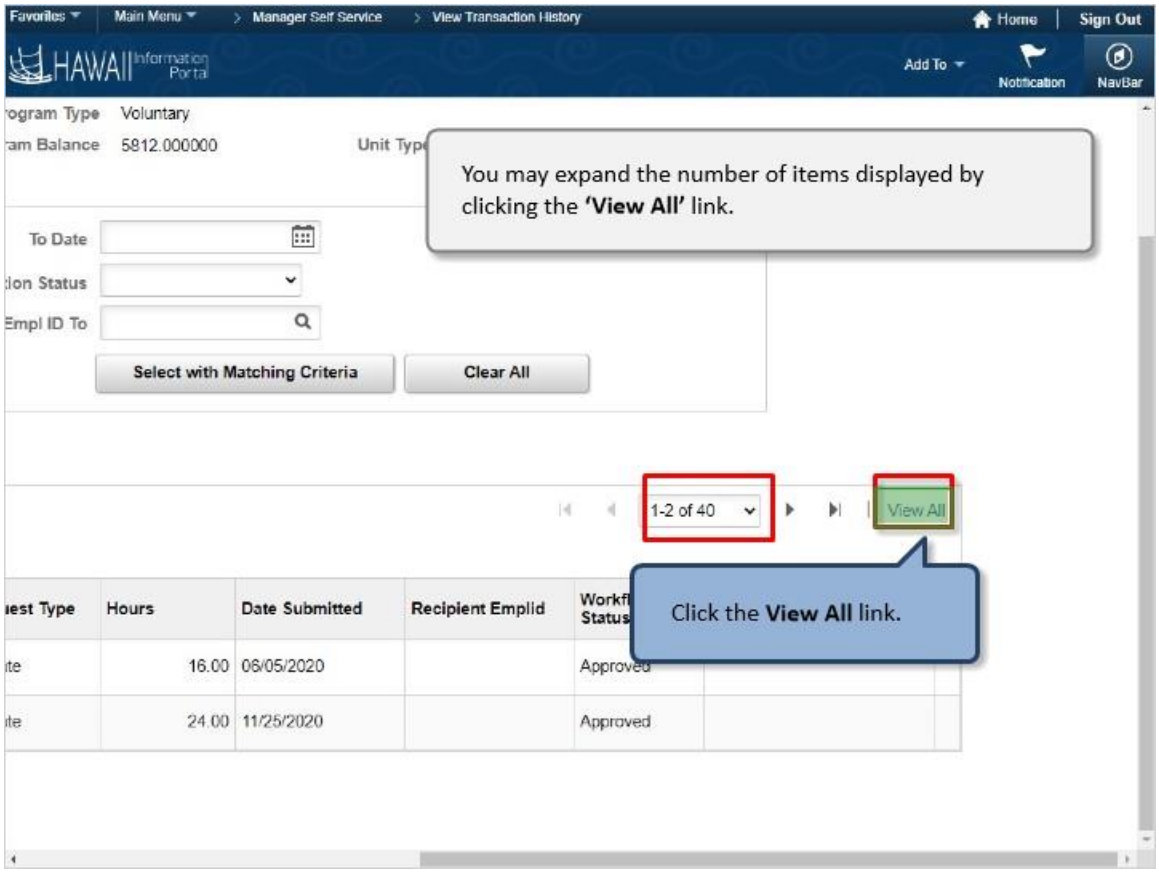
The **View Transaction History** page displays the Leave Program details, Selection Criteria and Leave Transfer Transaction Information.

Click the **scroll bar.**



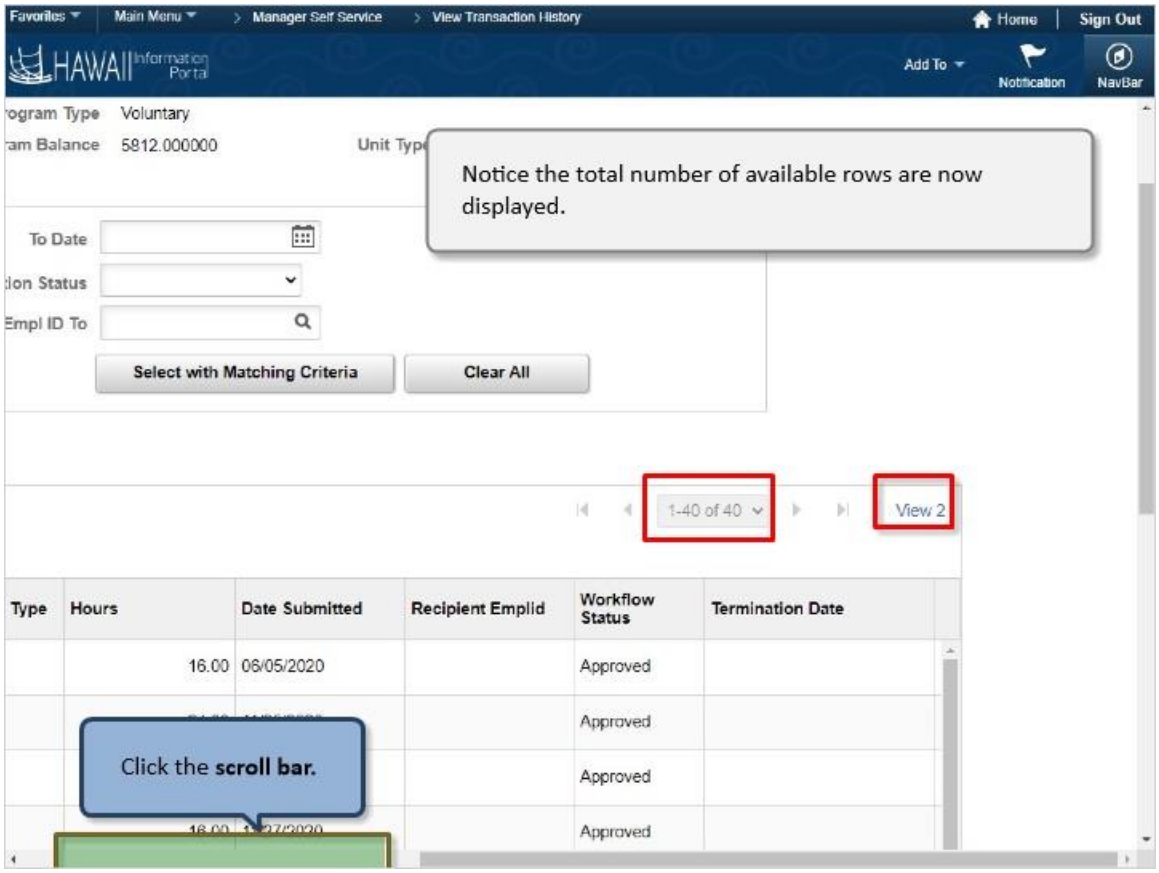
The Request Details are listed by Empl ID (Employee ID).

Click the **scroll bar** to the right to see more request details.



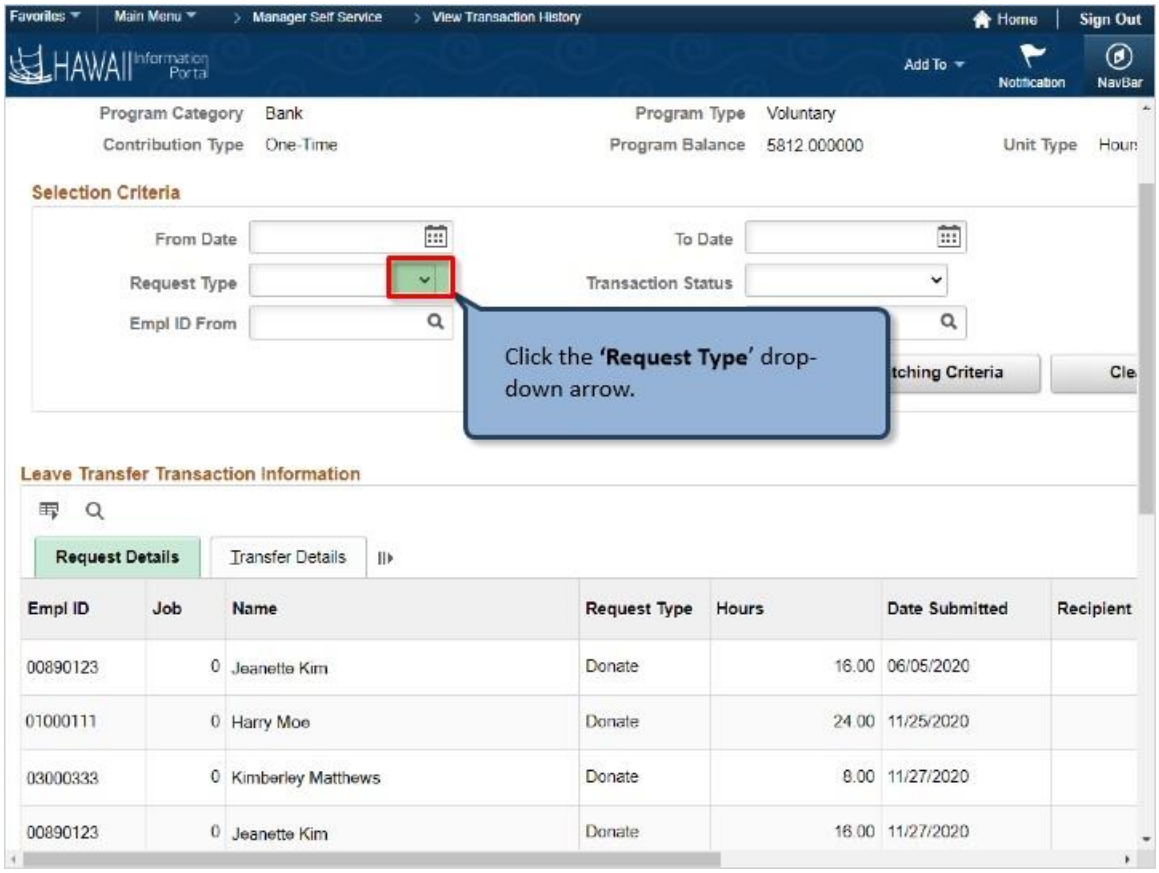
You may expand the number of items displayed by clicking the **'View All'** link.

Click the **View All** link.

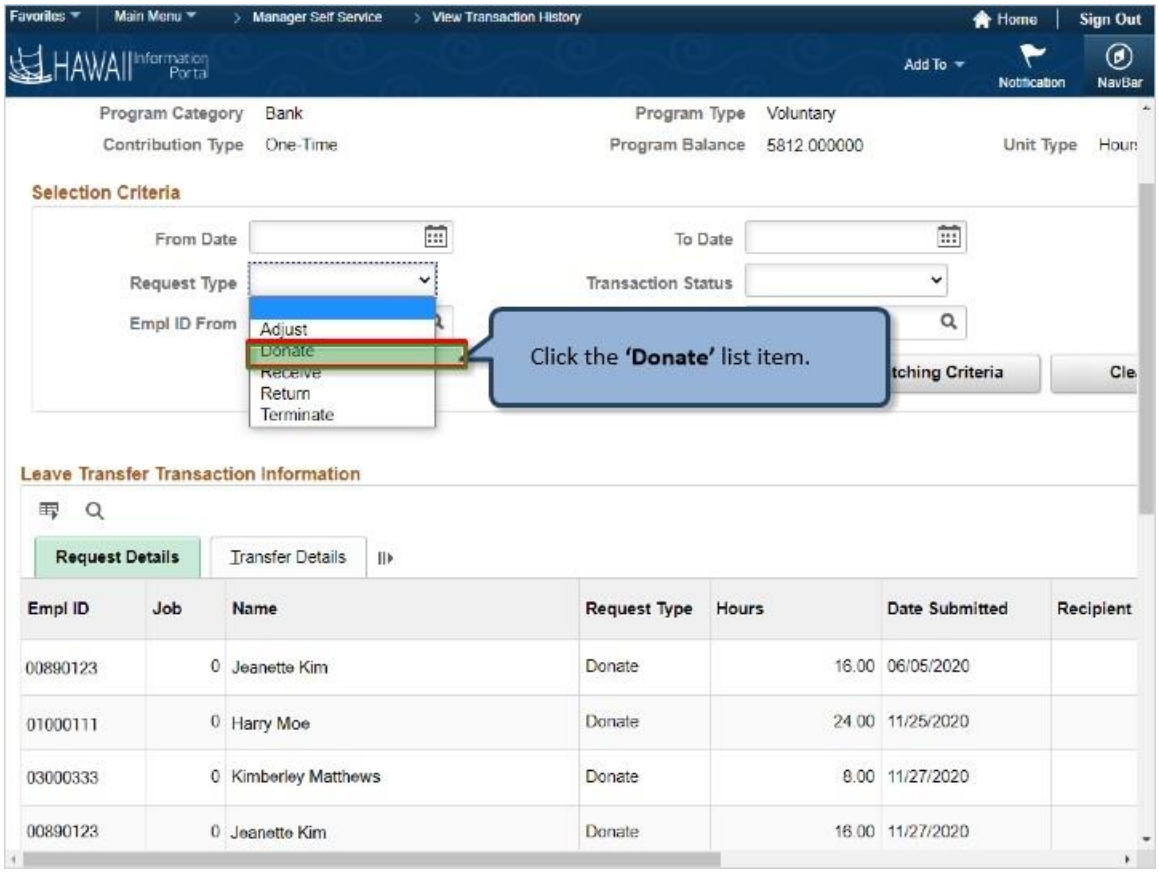


Notice the total number of available rows are now displayed.

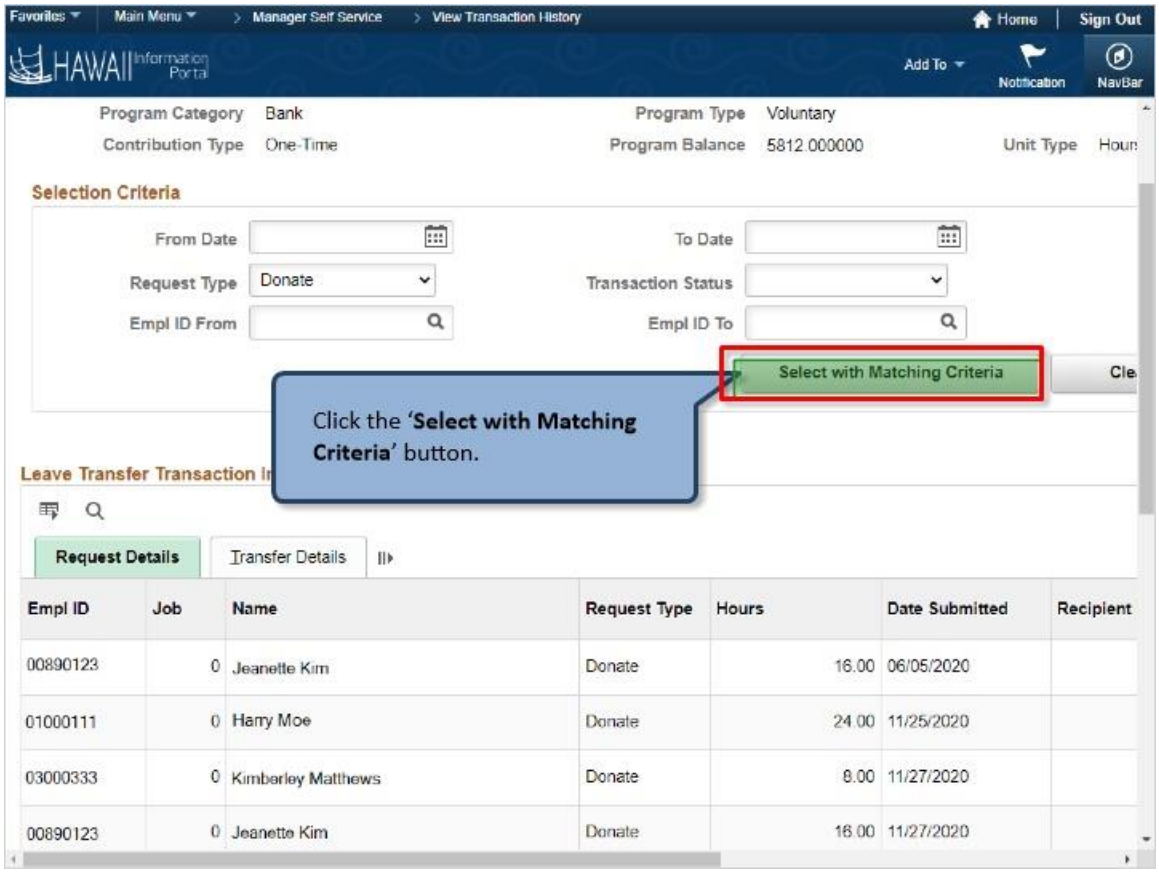
Click the **scroll bar.**



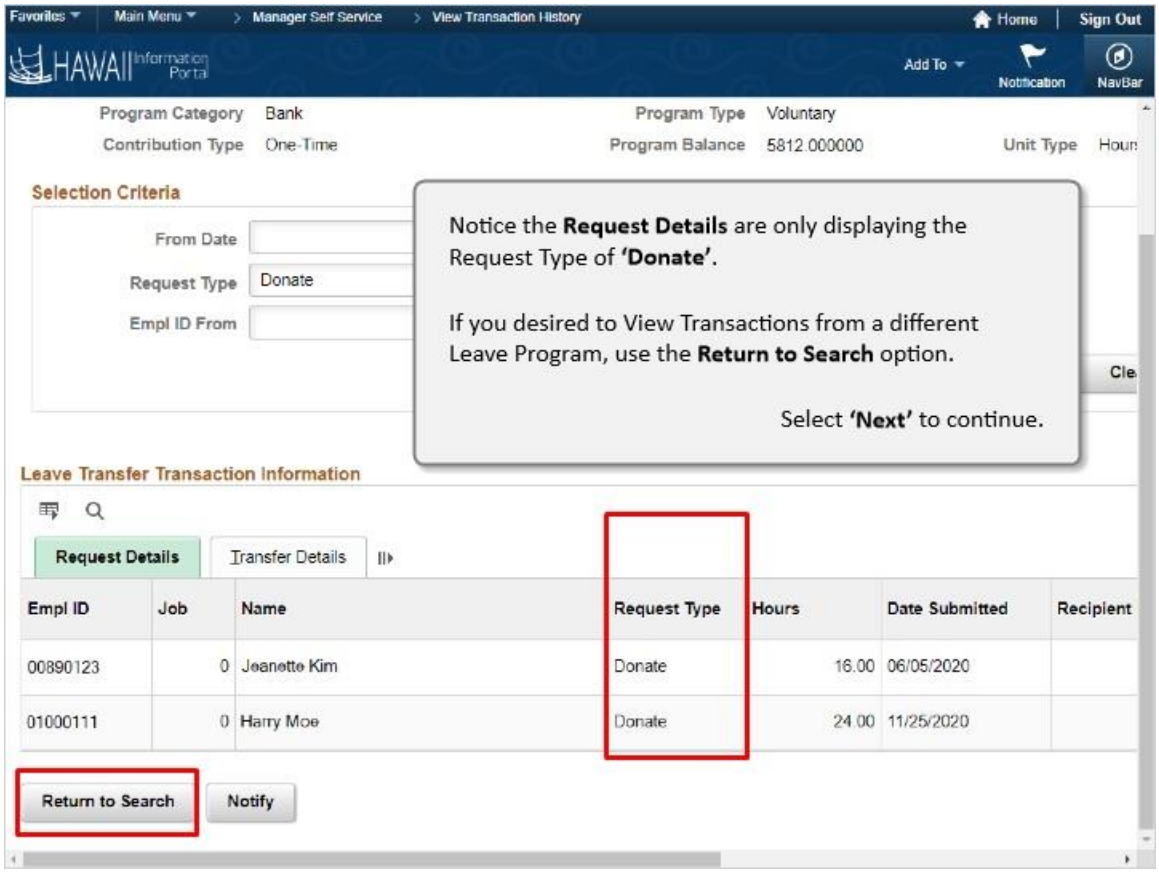
Click the **'Request Type**' drop-down arrow.



Click the **'Donate'** list item.



Click the '**Select with Matching Criteria**' button.



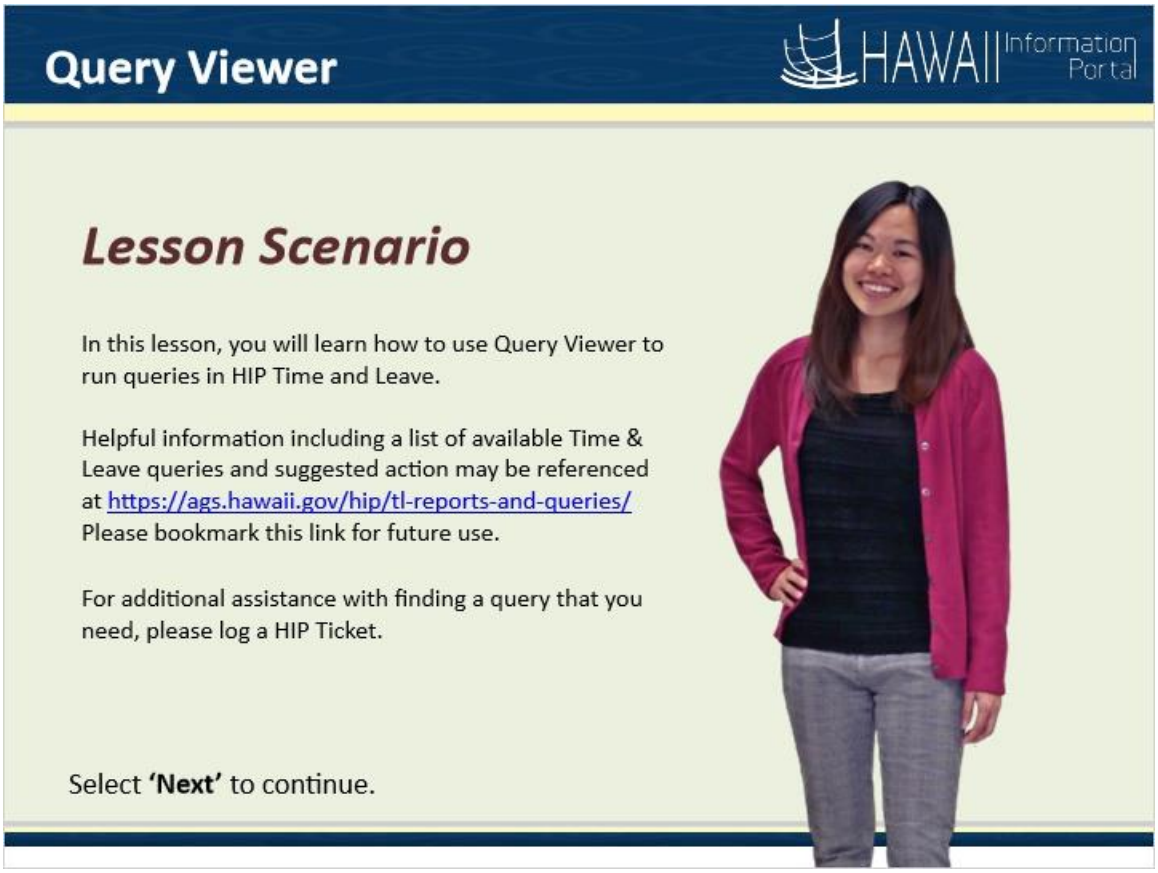
Notice the **Request Details** are only displaying the Request Type of **'Donate'**.

If you desired to View Transactions from a different Leave Program, use the **Return to Search** option.

Congratulations!

You've successfully completed this lesson.

QUERY VIEWER

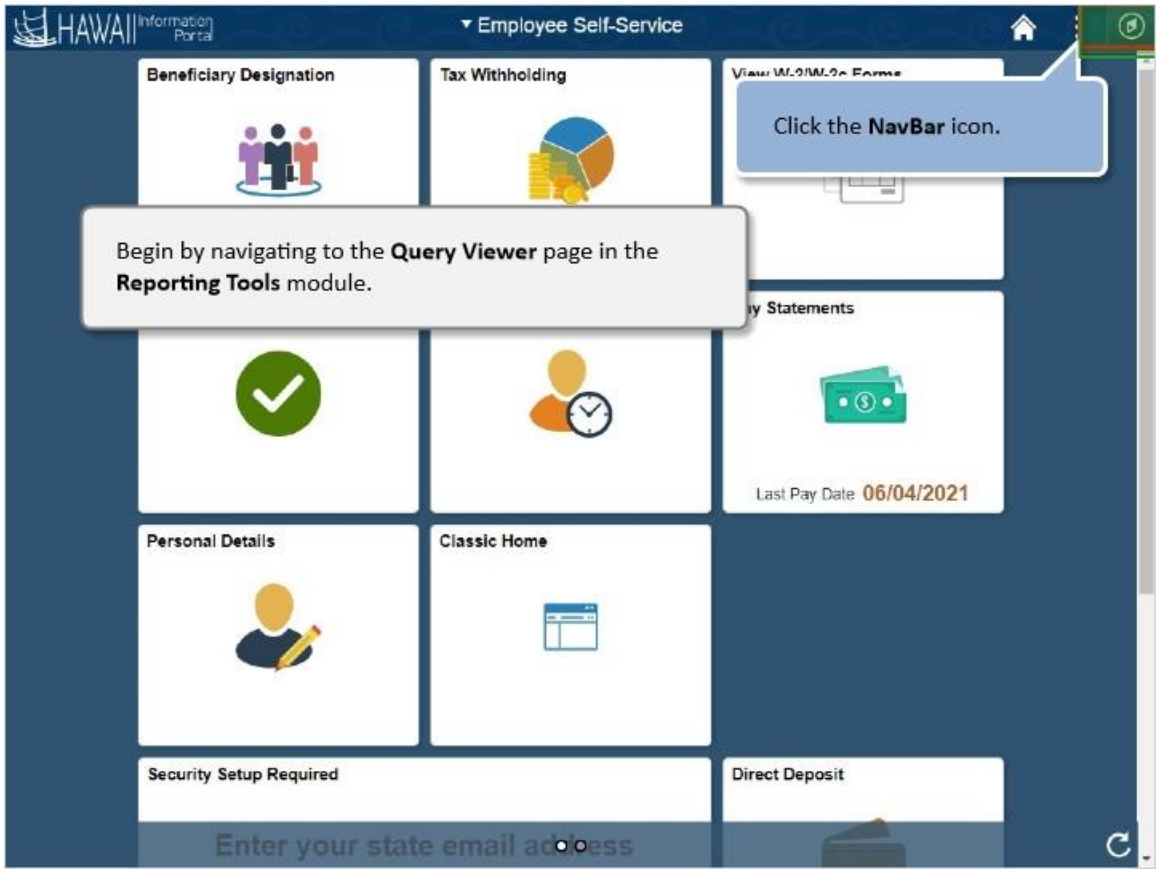


Lesson Scenario

In this lesson, you will learn how to use Query Viewer to run queries in HIP Time and Leave.

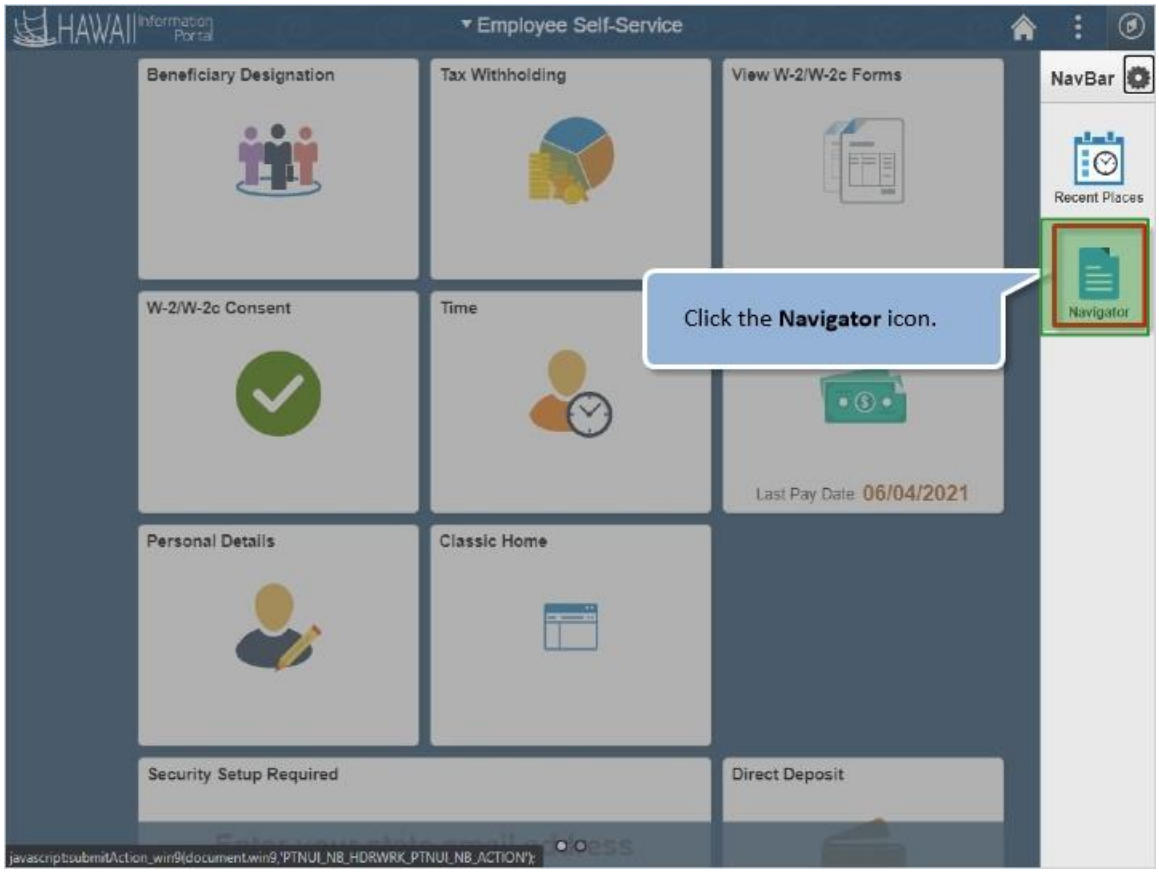
Helpful information including a list of available Time & Leave queries and suggested action may be referenced at https://ags.hawaii.gov/hip/tl-reports-and-queries/ Please bookmark this link for future use.

For additional assistance with finding a query that you need, please log a HIP Ticket.

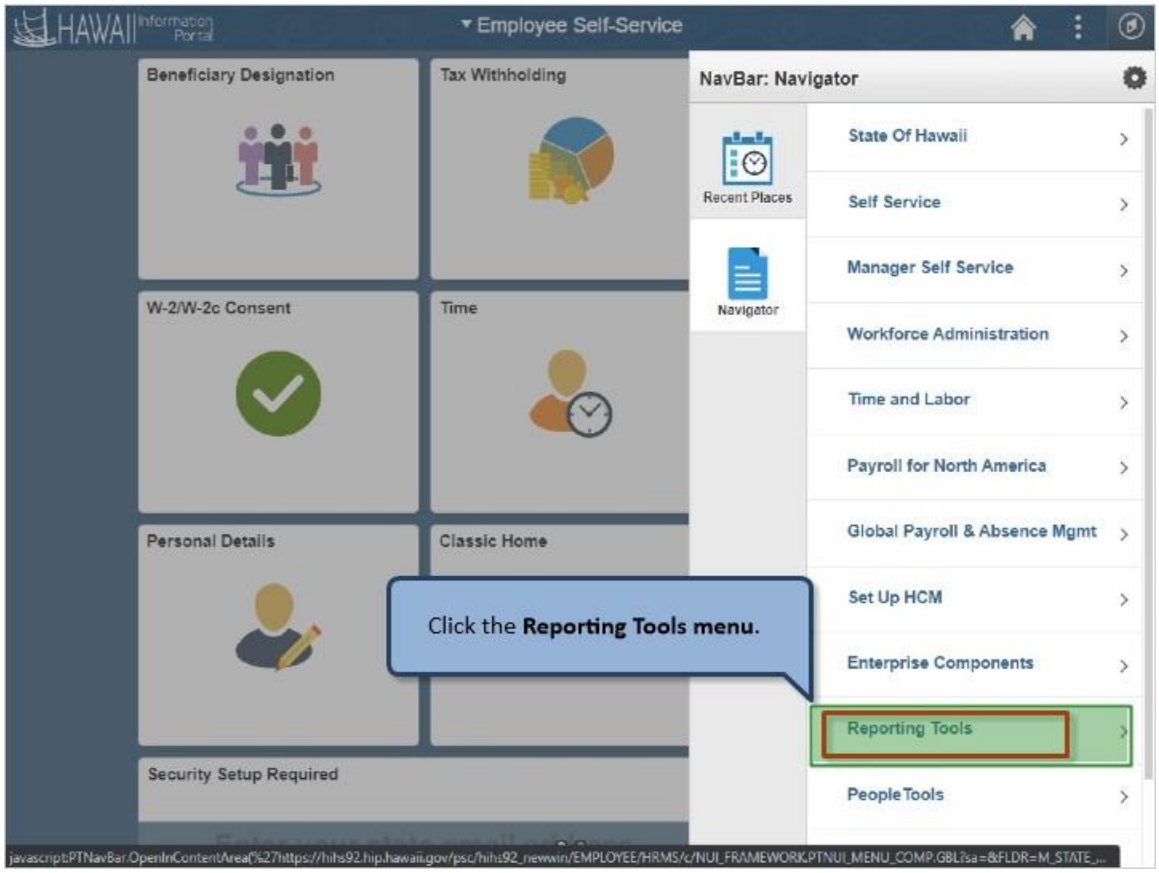


Begin by navigating to the **Query Viewer** page in the **Reporting Tools** module.

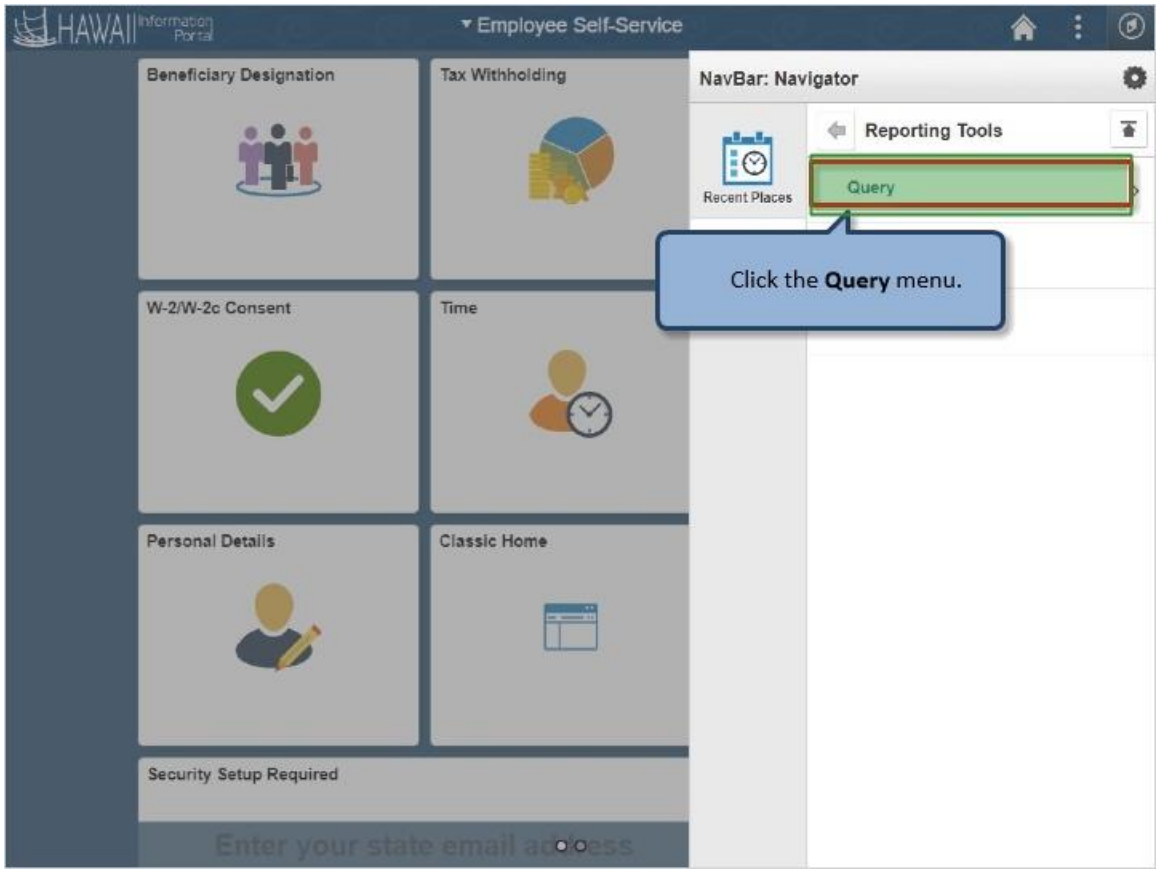
Click the **NavBar** icon.



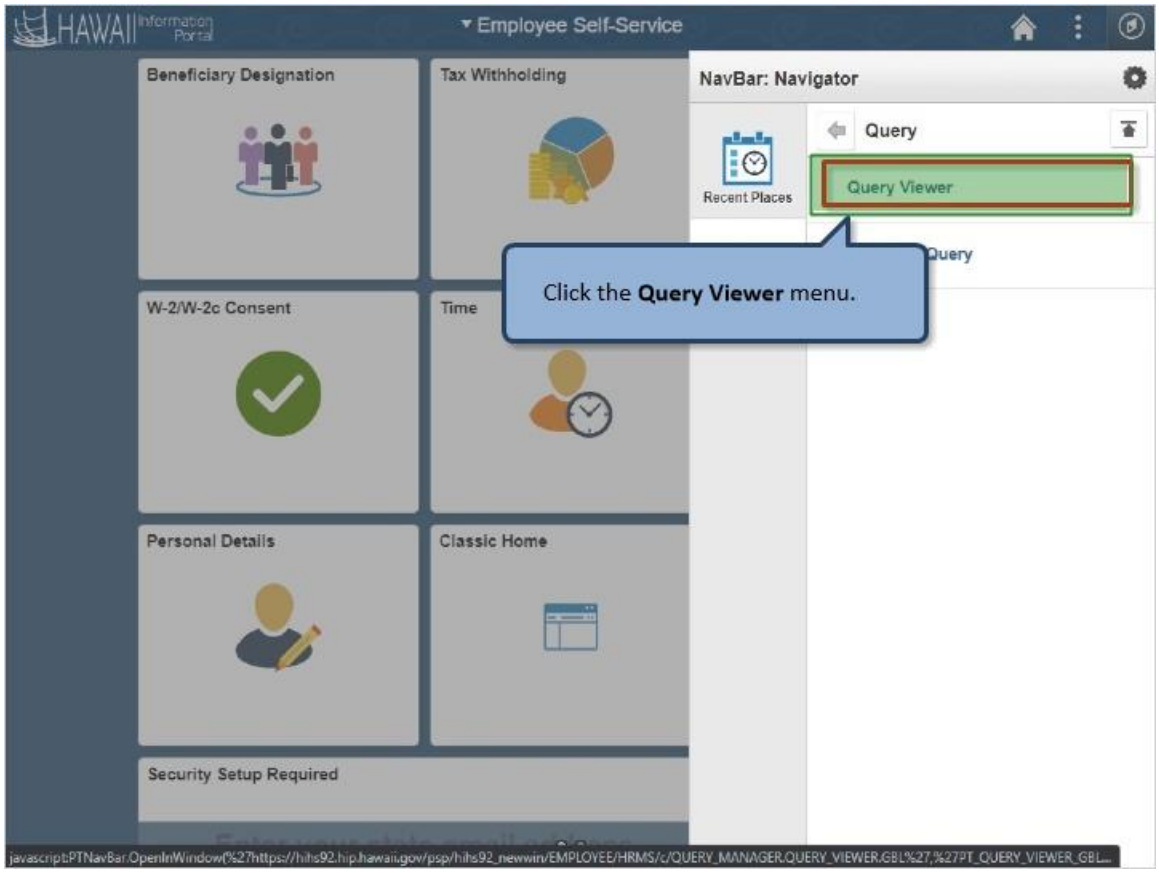
Click the **Navigation** icon.



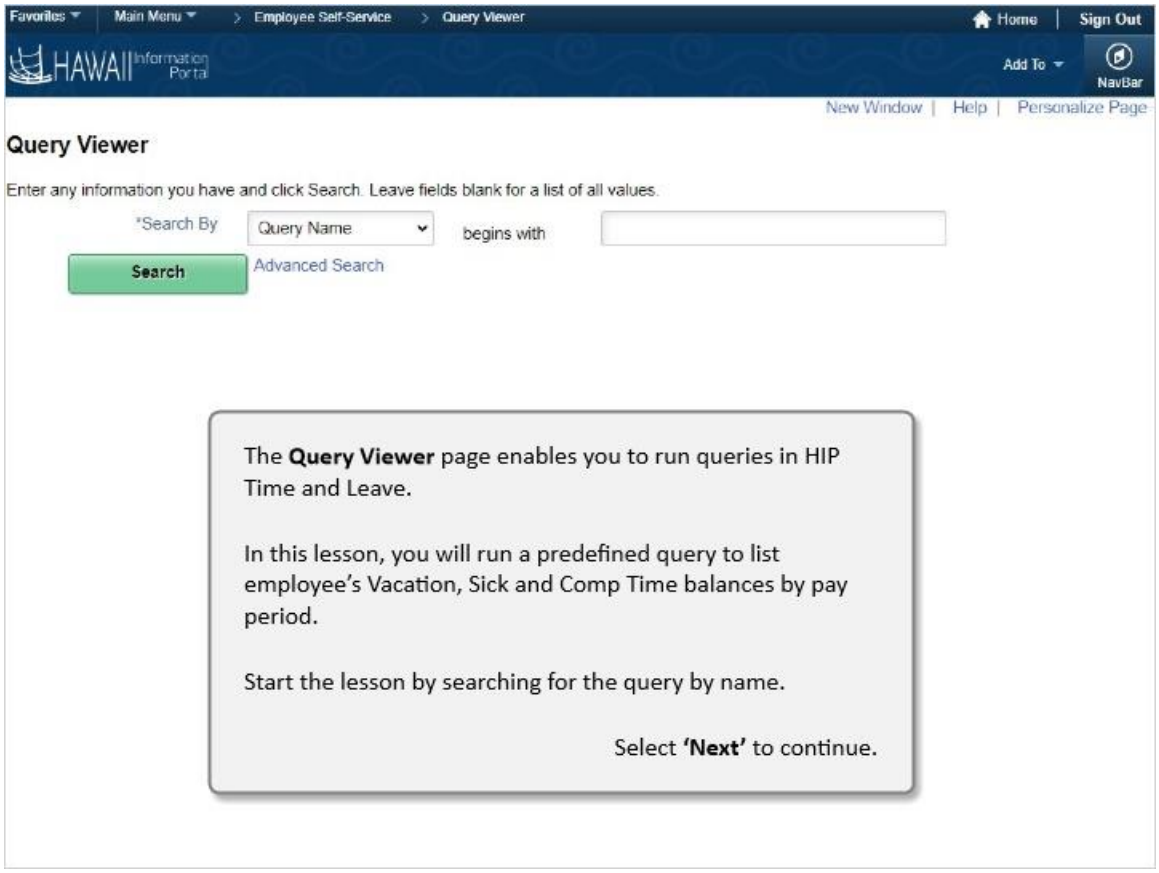
Click the **Reporting Tools** menu.



Click the **Query** menu.



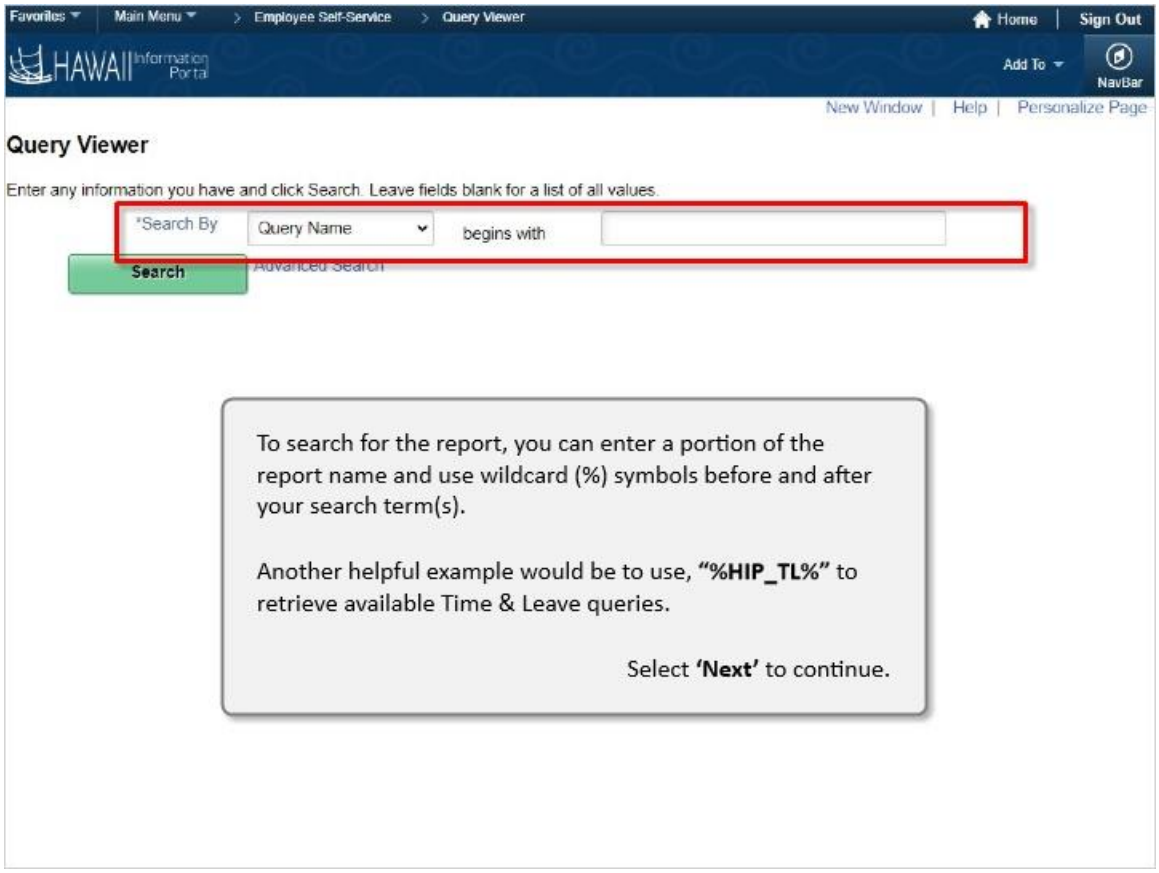
Click the **Query Viewer** menu.



The **Query Viewer** page enables you to run queries in HIP Time and Leave.

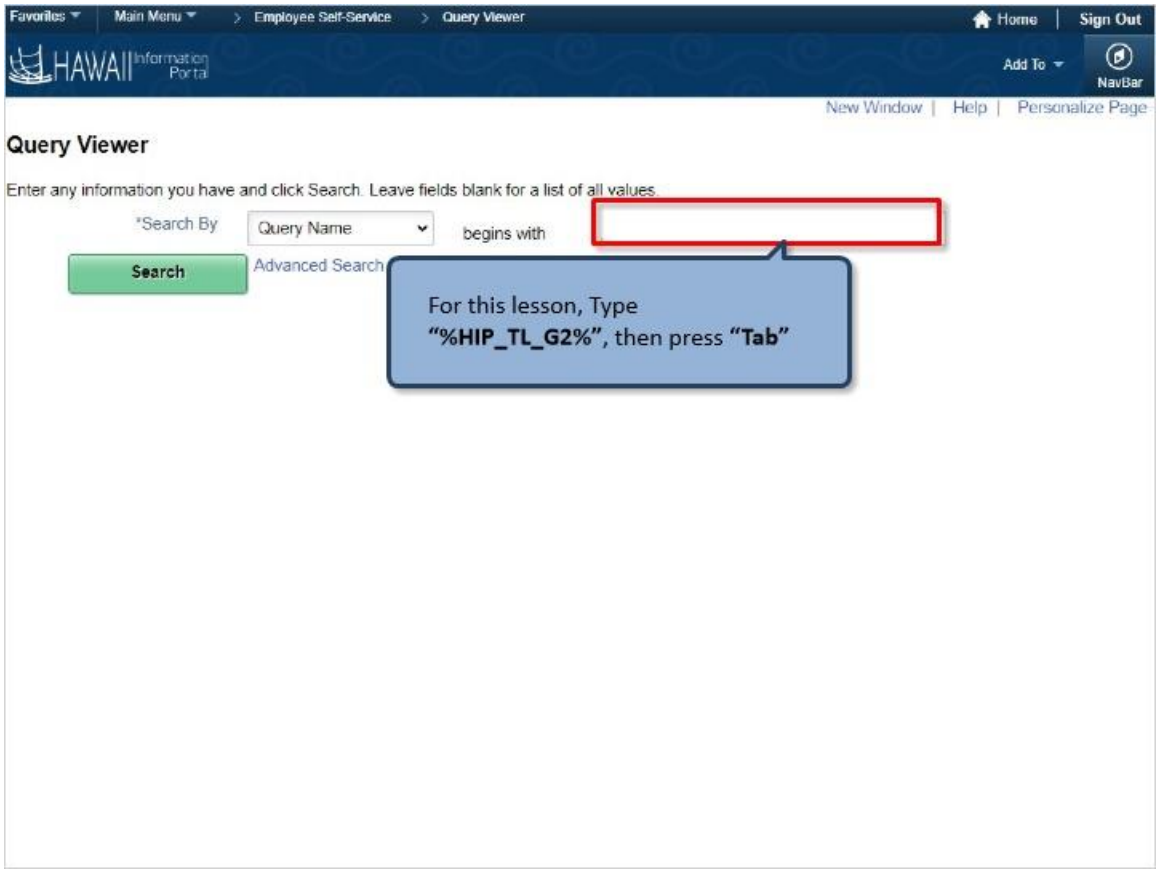
In this lesson, you will run a predefined query to list employee's Vacation, Sick and Comp Time balances by pay period.

Start the lesson by searching for the query by name.

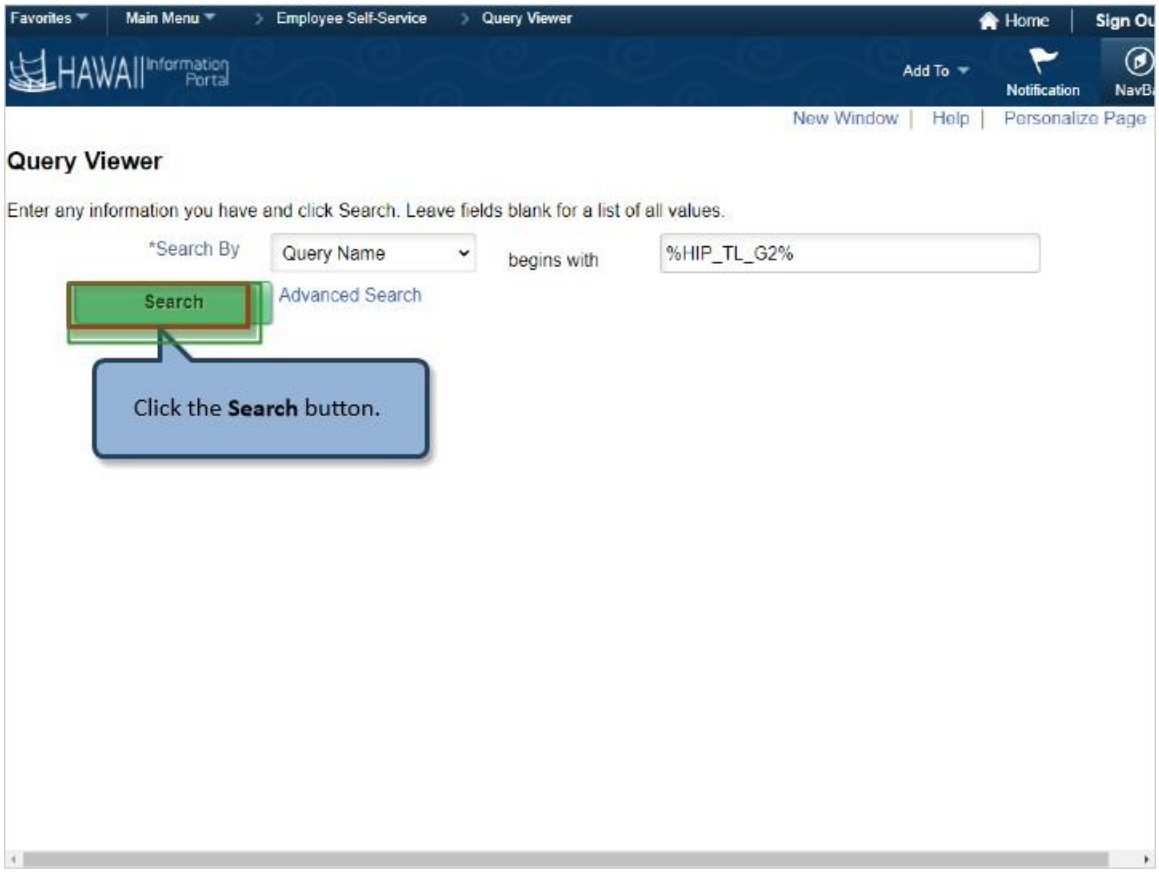


To search for the report, you can enter a portion of the report name and use wildcard (%) symbols before and after your search term(s).

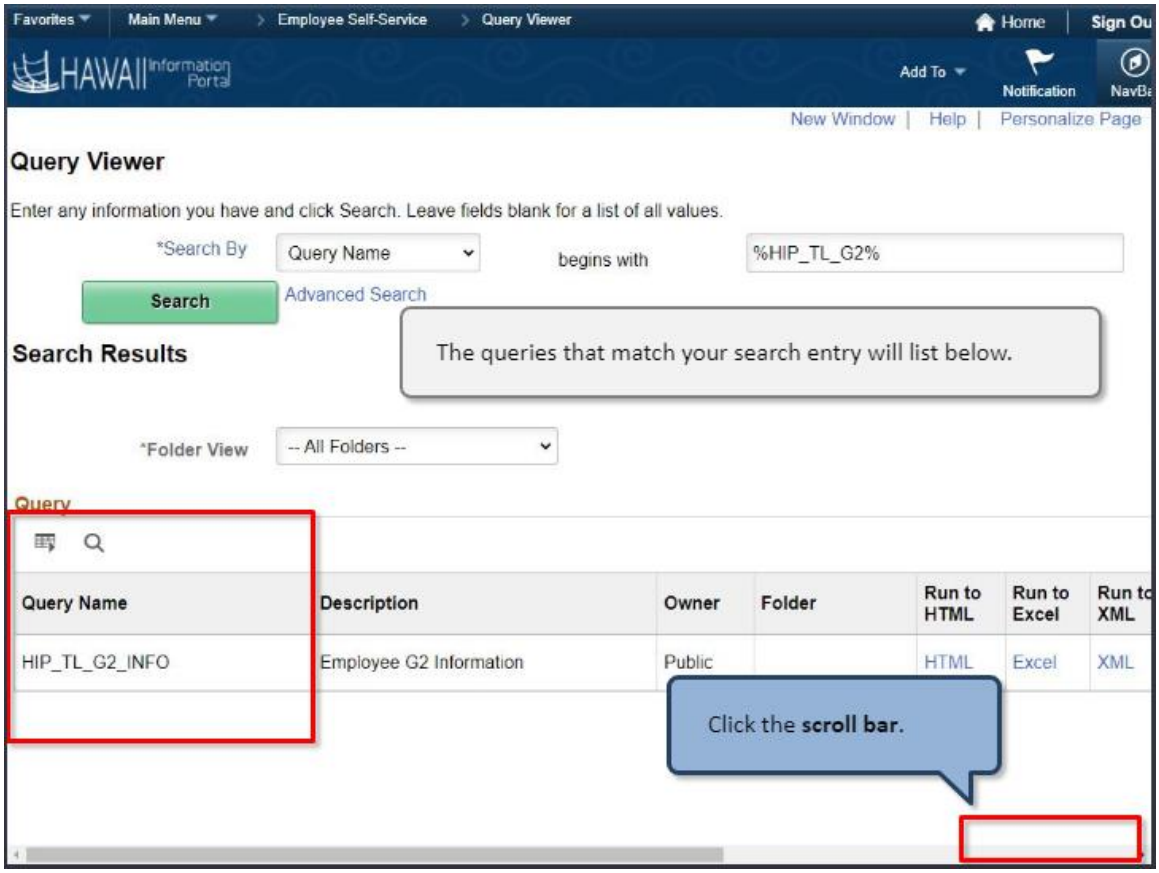
Another helpful example would be to use, **"%HIP_TL%"** to retrieve available Time & Leave queries.



For this lesson, Type **"%HIP_TL_G2%"**, then press **"Tab"**

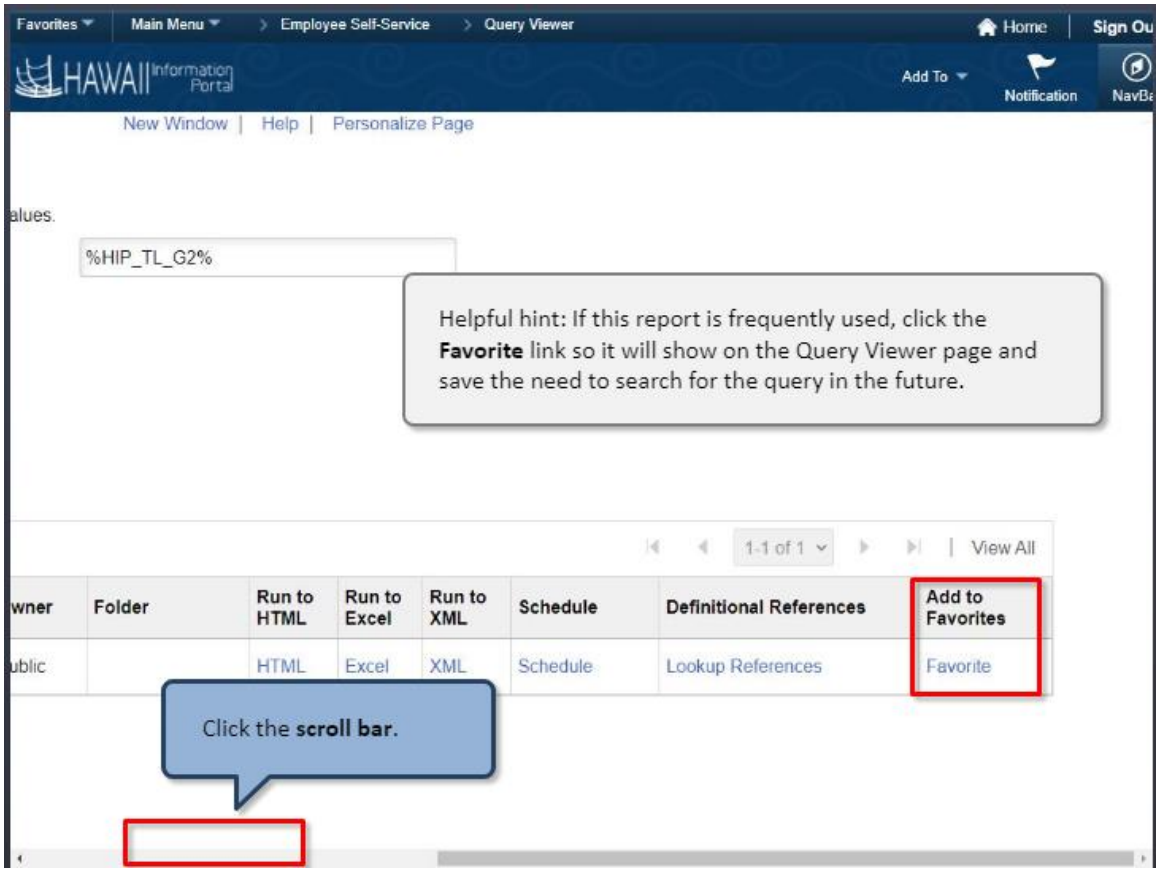


Click the **Search** button.



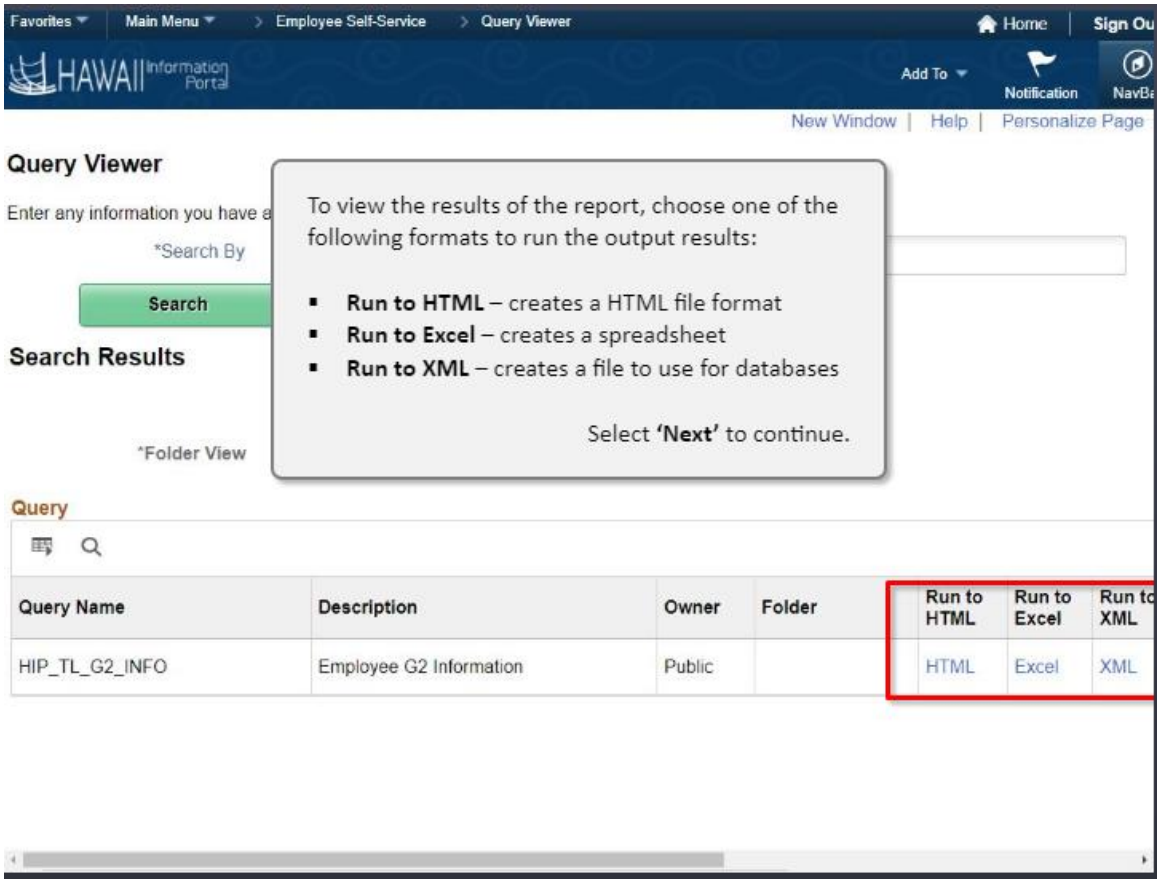
The queries that match your search entry will list below.

Click the **scroll bar**.



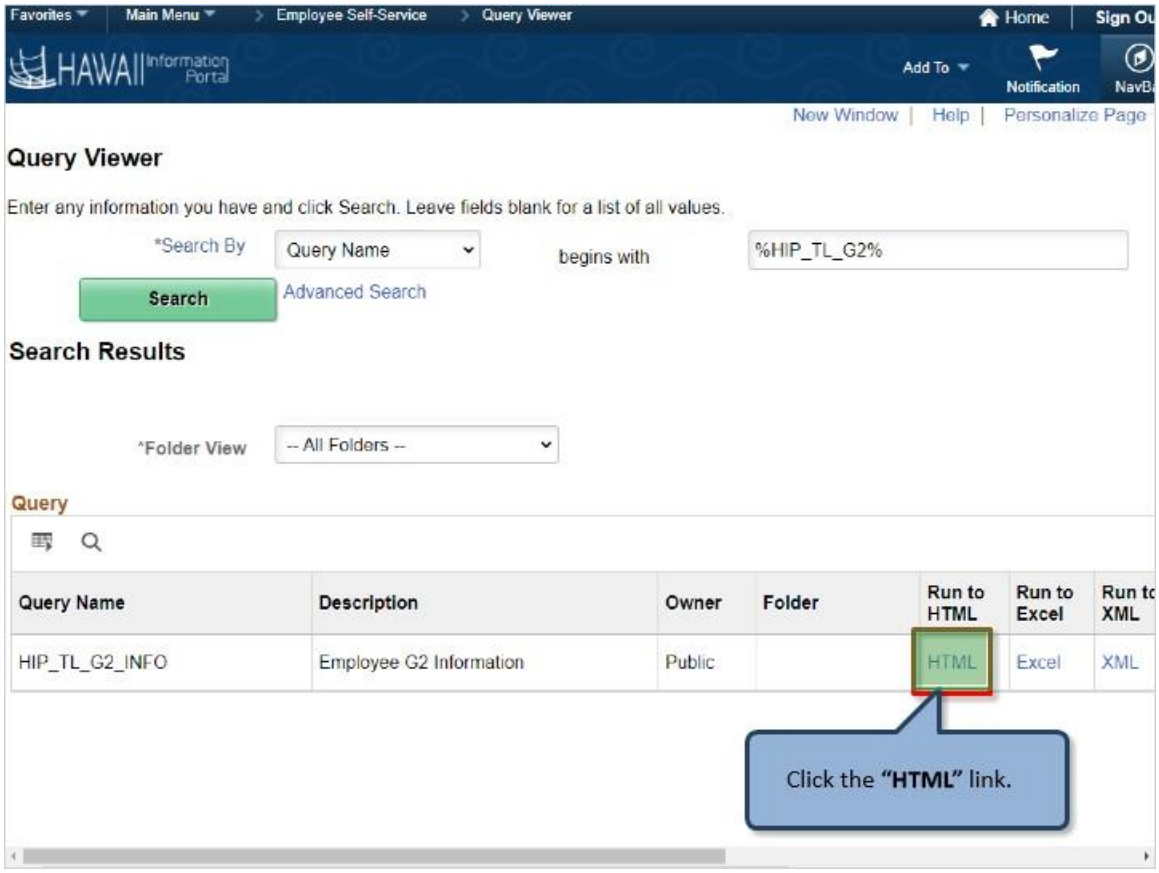
Helpful hint: If this report is frequently used, click the **Favorite** link so it will show on the Query Viewer page and save the need to search for the query in the future.

Click the **scroll bar.**

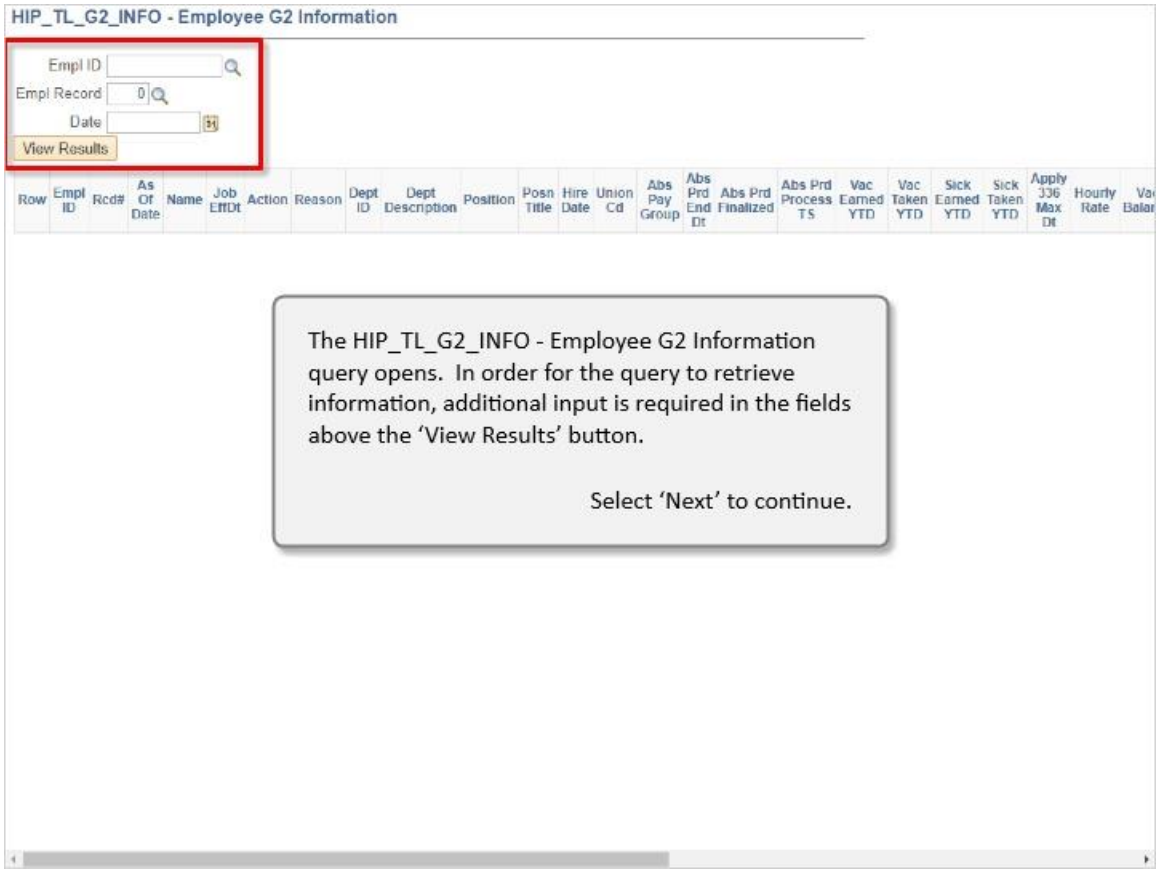


To view the results of the report, choose one of the following formats to run the output results:

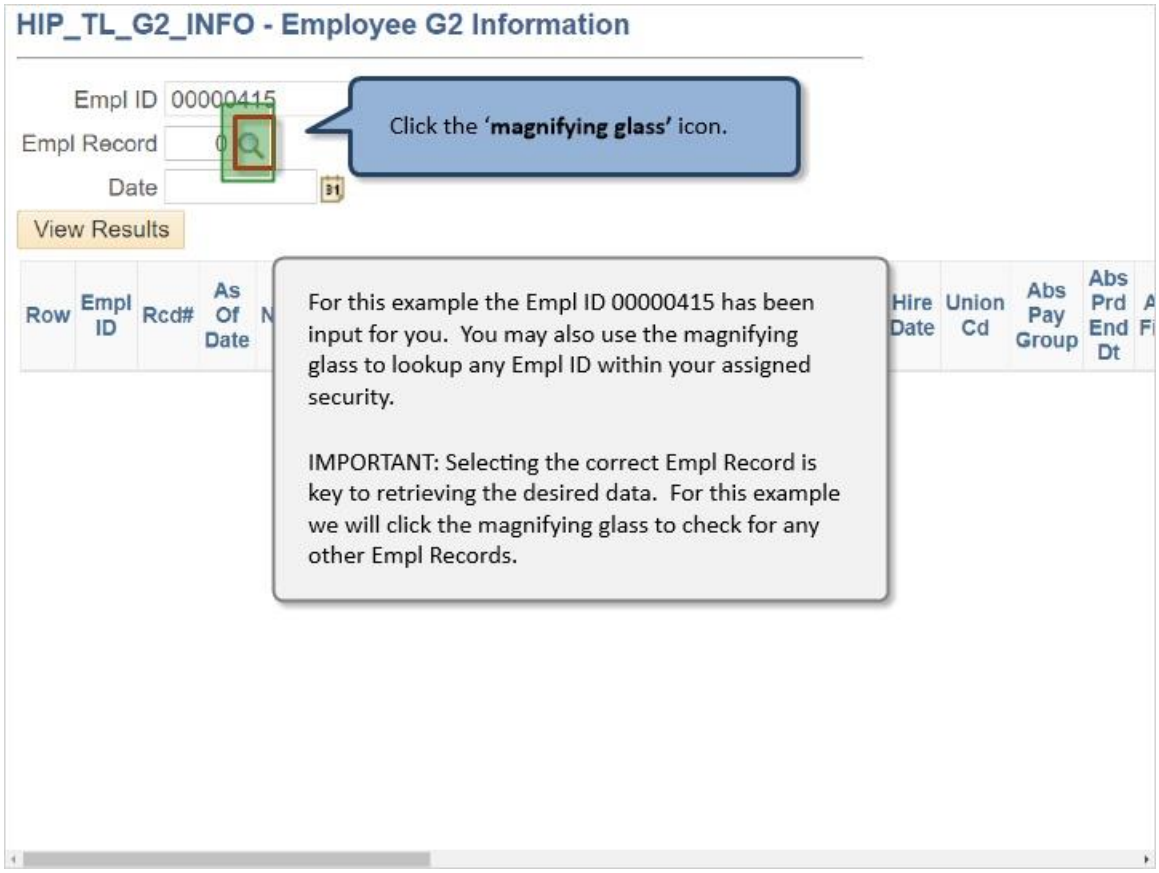
- **Run to HTML** - creates a HTML file format
- **Run to Excel** - creates a spreadsheet
- **Run to XML** – creates a file to use for databases



Click the **"HTML"** link.



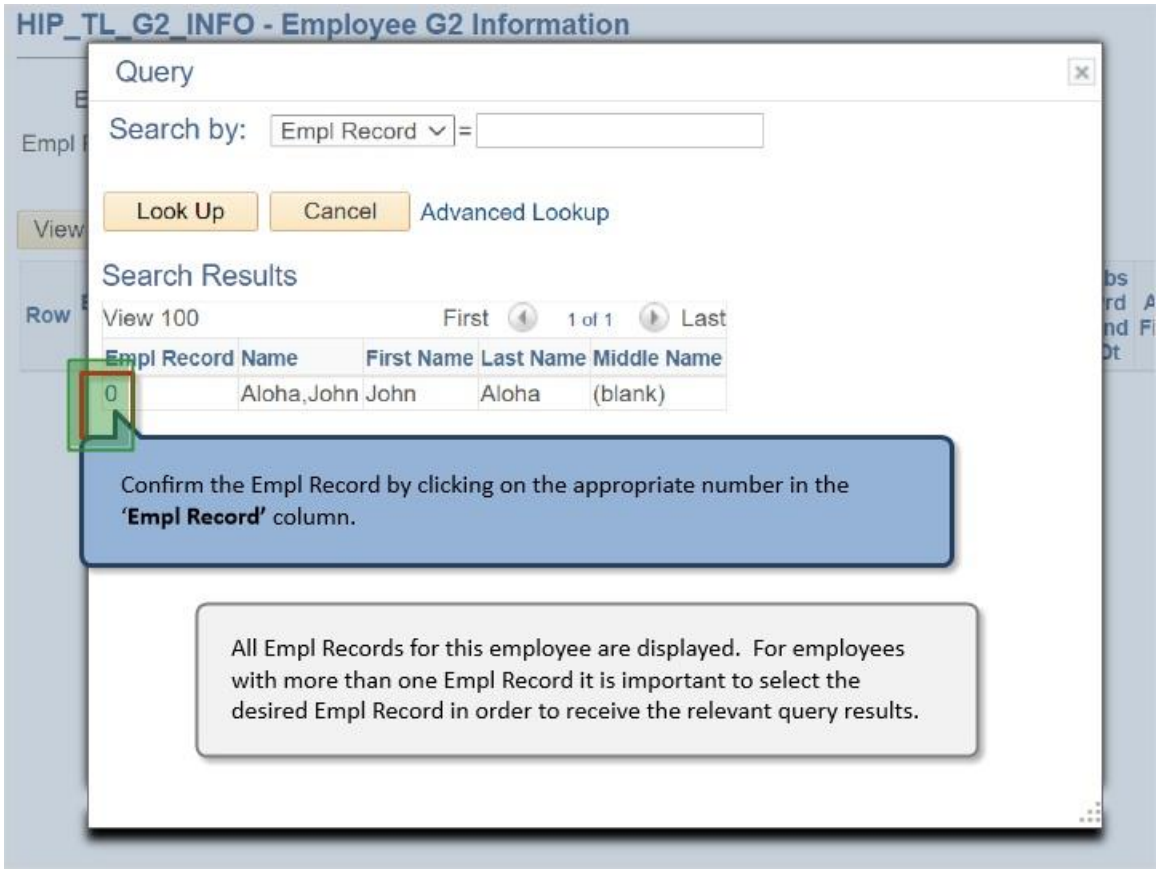
The HIP_TL_G2_INFO - Employee G2 Information query opens. In order for the query to retrieve information, additional input is required in the fields above the 'View Results' button.



For this example the Empl ID 00000415 has been input for you. You may also use the magnifying glass to lookup any Empl ID within your assigned security.

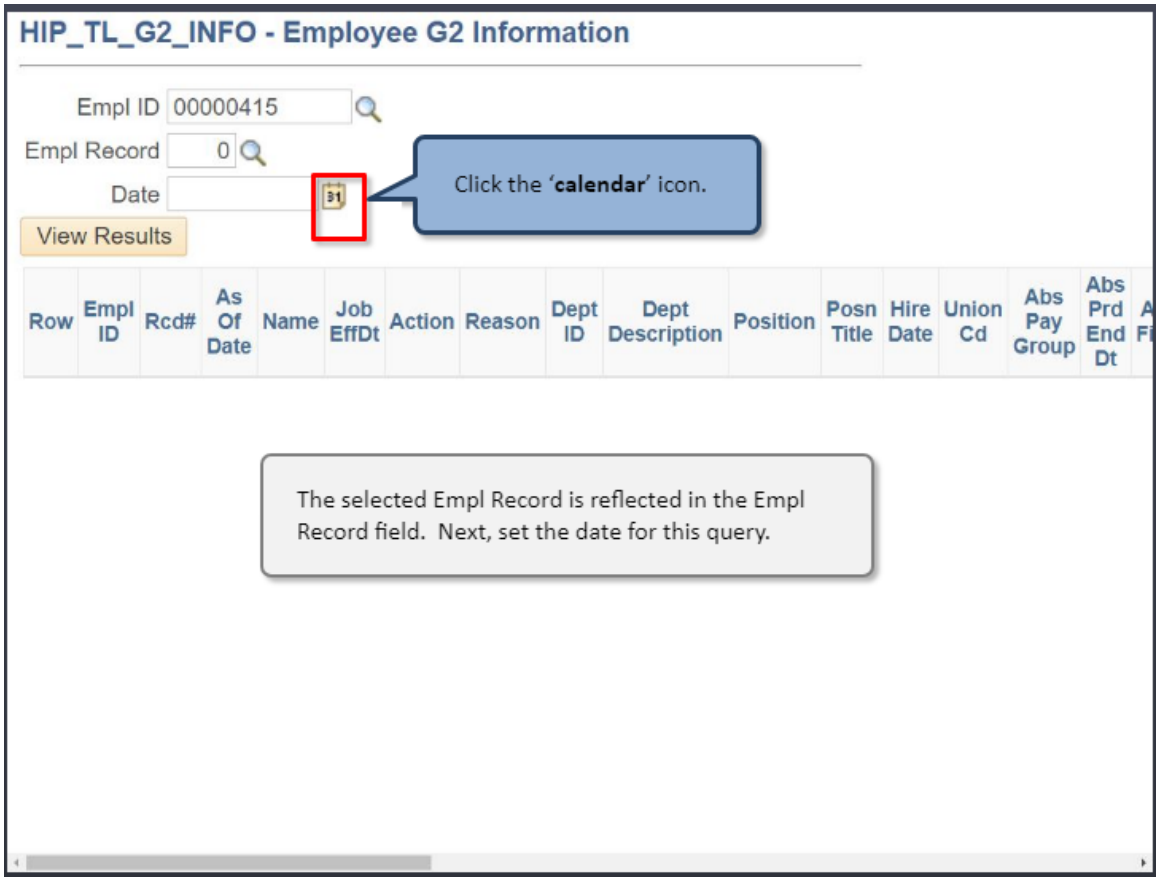
IMPORTANT: Selecting the correct Empl Record is key to retrieving the desired data. For this example we will click the magnifying glass to check for any other Empl Records.

Click the '**magnifying glass'** icon.



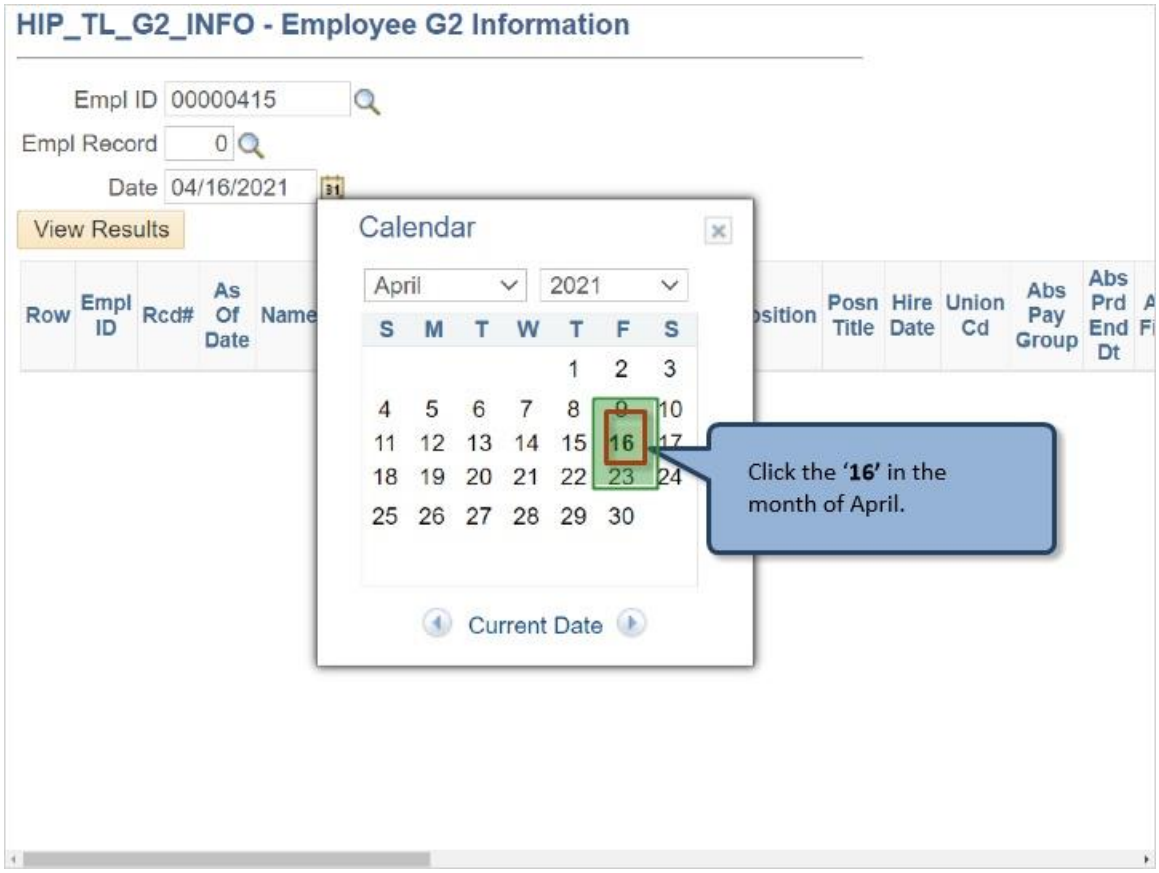
All Empl Records for this employee are displayed. For employees with more than one Empl Record it is important to select the desired Empl Record in order to receive the relevant query results.

Confirm the Empl Record by clicking on the appropriate number in the '**Empl Record'** column.

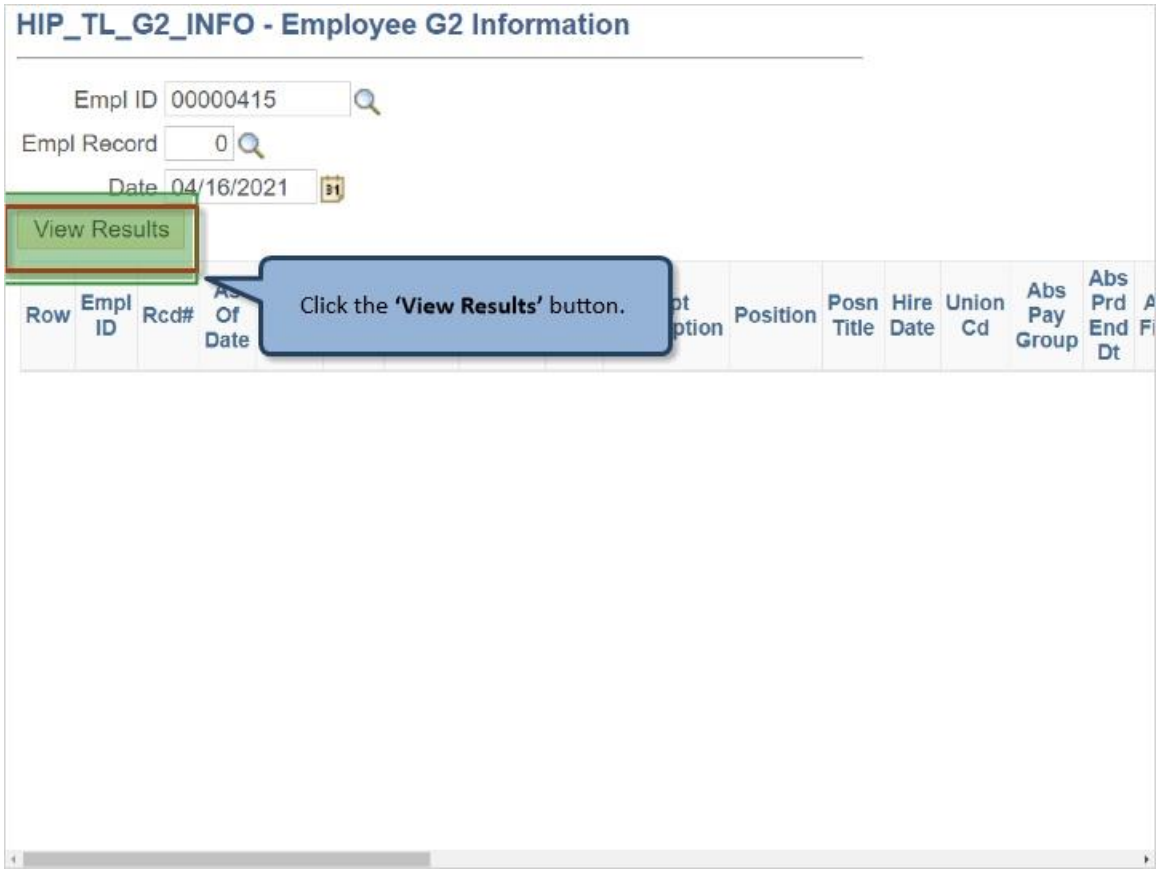


The selected Empl Record is reflected in the Empl Record field. Next, set the date for this query.

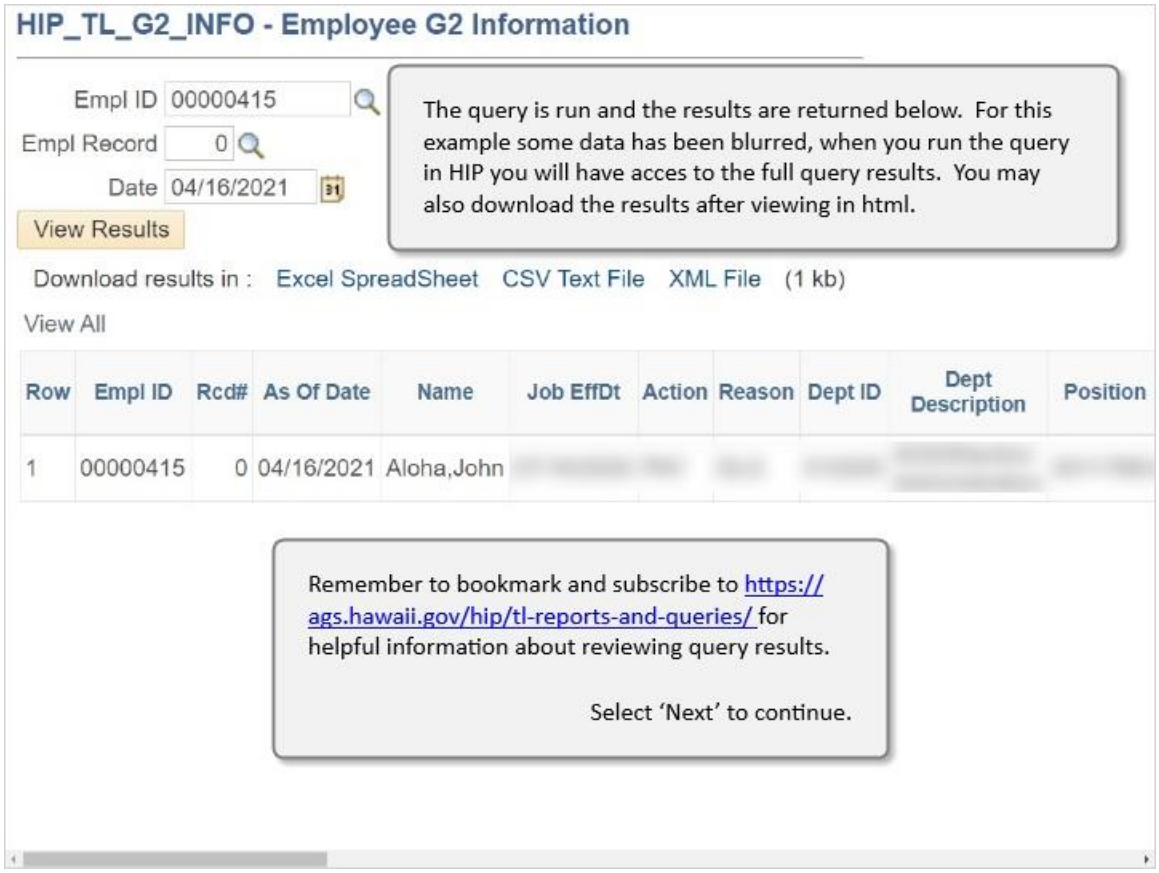
Click the '**calendar**' icon.



Click the **'16'** in the month of April.



Click the **'View Results'** button.



The query is run and the results are returned below. For this example some data has been blurred, when you run the query in HIP you will have acces to the full query results. You may also download the results after viewing in html.

Remember to bookmark and subscribe to https://ags.hawaii.gov/hip/tl-reports-and-queries/ for helpful information about reviewing query results.

Congratulations!

You've successfully completed this lesson.

END

Maika'i

Please click 'Save and exit' at the upper right.

*To continue close the lesson by clicking the **'Save and exit'** in the top right-hand corner of the course.*

Do not close the browser window until after clicking 'Save and exit'