

Create and Maintain Absence Requests

CONTENTS

Overview	1
Navigation	1
Overview of the Screen and Notable Areas	2
Search	2
Absence Detail Tab	4
Submission Options	9
Partial Days Tab	9
Forecast Tab	10
Comments Tab	11
Cancel Absence Requests/Manage Absence Requests	11
Jsing The Create and Maintain Absence Requests Screen	
Search For An Existing Absence Request	12
Edit An Existing Absence Request	
Cancel An Existing Absence Request	
Enter A New Absence Request (Absence Detail Tab)	
Enter A Partial Day Absence Request (Partial Days Tab)	
Examples of Partial Day Absence Requests	
Examples of Fartial Day Absence Requests	······································

OVERVIEW

The Create and Maintain Absence Requests screen is a dynamic tool available to Leave Keepers and HR Admins. Users can manage regular absence requests and view balances on behalf of their Exception Hourly and Salaried employees. NOTE: This screen requires a level of system knowledge and access above that of a normal user. HIP will generate warning messages for invalid actions, however users should be careful when submitting or modifying absence requests to ensure the data integrity of the system remains intact.

NAVIGATION

NavBar > Navigator > Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Create and Maintain Absences

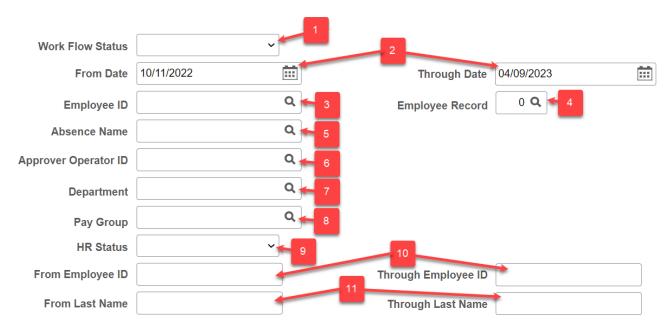


OVERVIEW OF THE SCREEN AND NOTABLE AREAS

The following sections are what you will see on the Create and Maintain Absence Requests screen and helpful tips to help you transact absences on behalf of you employees.

SEARCH

Click the carrot icon to expand the **Search** criteria and use the available parameters to help narrow your search to provide focused results when looking for specific absence requests.

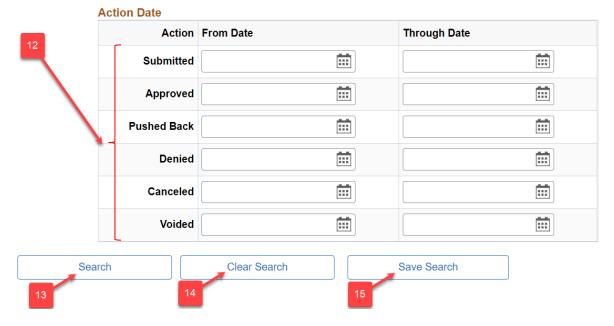


 Work Flow Status – Statuses represent the stage of an absence request at a particular point in time. Select an option from the dropdown menu to view absence requests for all of your available employees that are in a particular status or leave this field blank to search for absence requests of all statuses.



- 2. **From/Through Date** Define a date range for the system to search for absence requests. The system will return absence requests with start/end dates that fall within the date range entered. NOTE: The From/Through date range will automatically default to 3 months before and 3 months after the current date.
- 3. **Employee ID** Enter an EMPL ID number to search for or click the magnifying glass to search by name if you do not know the ID number. NOTE: There is a customization on EMPL IDs limiting users to only see or search for EMPL IDs they have access to as defined by their Row Level Security.
- 4. **Employee Record** Some employees have multiple EMPL Record numbers on the HR Job Data side of the HIP system due to having multiple job employments (this can be indicated in the system as "0", "1", "2", etc.). Pick the correct number that corresponds to the employee's job in your department so HIP can search for and process absences effectively. NOTE: This automatically defaults to "0" and the system will only show Employee Records that are eligible for Absence Management.
- 5. **Absence Name** Enter an Absence Name (i.e. HI SIC AT, HI VAC AT, etc.) to search for absence requests associated with a particular type of absence. If you do not know the Absence Name, click on the magnifying glass to view the **Look Up Absence Name** window. To narrow the results, select search by **Element Name** at the top and type "**HI**" in the **begins with** field to narrow the results to absence types specific to the State of Hawaii.
- 6. **Approver Operator ID** Search for absences associated with a specific approver by entering their EMPL ID or click on the magnifying glass to search by name if you do not know the ID number.
- 7. **Department** Enter your Department ID number to search for absence requests within your department or click on the magnifying glass to search for your department's ID number.
- 8. **Pay Group** Pay groups are groupings of employees organized based on common characteristics to facilitate payroll processing. The State has two (2) pay groups, they are **LAG** and **ATF**, select one (1) of these options to search for absence requests by their pay group.
- 9. **HR Status** This indicates if an employee is **Active** or **Inactive** in the HR Job Data side of the system. Select one (1) of these options to search for absence requests by their HR Status.
- 10. **From Employee ID/Through Employee ID** Search for absences for a range of employees from a specific EMPL ID through another EMPL ID.
- 11. **From Last Name/Through Last Name** Search for absences for a range of employees from a specific employee last name through another employee last name.





- 12. **Action Date** Enter a From/Through Date range to search for absences that were **Submitted**, **Approved**, **Pushed Back**, **Denied**, **Canceled**, or **Voided** during a particular period of time.
- 13. Click the **Search** button to prompt the system to search for absence requests based off the parameters entered.
- 14. Click the **Clear Search** button to clear any previous search parameters that were saved. NOTE:

 Remember to clear any existing search parameters before entering a new absence to avoid error messages such as the following:

Absence Event Begin Date and End are not within the range of the From Date and the Through Date. (17000,4900)

Both the Absence Take Begin Date and End Date must fall within the range of the From Date and the Through Date.

OK

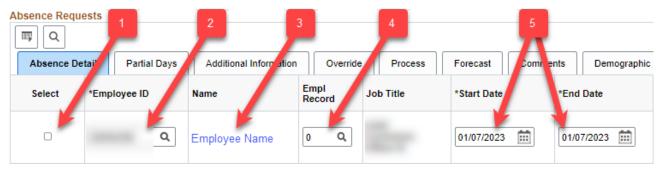
15. Click the **Save Search** button to save any search parameters that were entered. NOTE: It is not recommended to save search parameters as this will overwrite the default search values.

ABSENCE DETAIL TAB



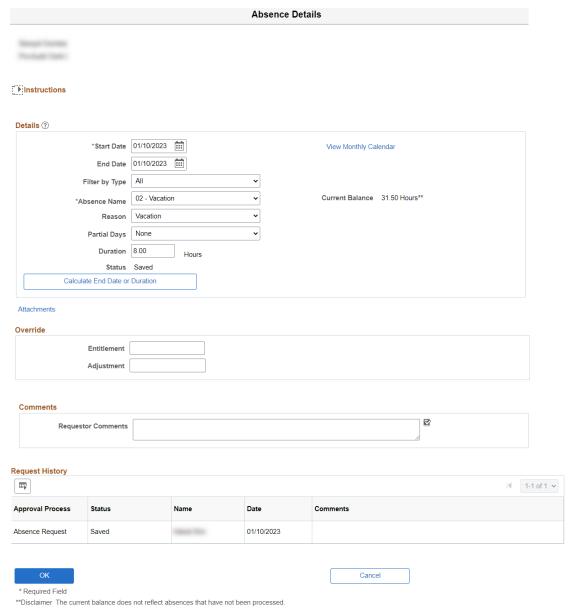
Use this tab to enter or update basic details for an absence request.





- 1. **Select** Check this box to select the corresponding row for action (i.e. submit, cancel, copy, etc.).
- Employee ID Enter an Employee ID to submit an absence request on behalf of or use the
 magnifying glass to search by name if you do not know the ID number. NOTE: There is a
 customization on EMPL IDs limiting users to only see or search for EMPL IDs they have access to as
 defined by their Row Level Security.
- 3. The system will display the **Name** of the employee associated with the numerical value entered in the **Employee ID** field. Once all the required fields of the absence request are filled in, the employee's name becomes a link. Clicking on it will prompt the **Absence Details** window to pop-up which will provide the details and history of the absence request:



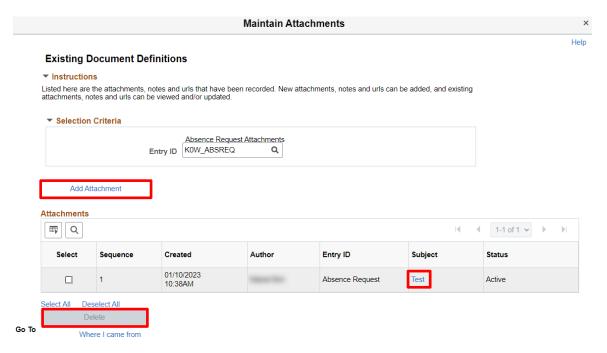


- 4. EMPL Record Some employees have multiple EMPL Record numbers on the HR Job Data side of the HIP system due to having multiple employments (this can be indicated in the system as "0", "1", "2", etc.). You must pick the correct number that corresponds to the employee's job in your department so HIP can process absences effectively. NOTE: This automatically defaults to "0", in addition the system will only show EMPL Records for an employee that are eligible for Absence Management.
- 5. **Start Date/End Date** Enter a Start and End Date that corresponds with the absence an employee took.





- 6. **Absence Name** Select an absence name (i.e. sick, vacation, etc.) from the list of available options. NOTE: Only absence types for which the employee is eligible are available for selection.
- 7. **Reason** Absence Reasons define why an absence was taken and available reasons will depend on your selection in the Absence Name section. NOTE: Selecting an absence reason is optional when submitting a request.
- 8. **Duration** The system automatically calculates and displays the length of time (in hours) the absence request is for.
- 9. **Attachment** Click the **View/Add** link to prompt the **Maintain Attachments** pop-up window where you can view or delete any documents that accompany the absence request and add additional backup documentation if needed. NOTE: <u>Do not attach any documents that contain Personally Identifiable Information (PII).</u>



- 10. **Balance** The system automatically calculates and displays the employee's absence balance as of the last payroll that was finalized.
- 11. **Original Begin Date** For informational purposes only. This defaults to the **Start Date** of the absence request. NOTE: If you make changes to an existing absence request (i.e. change the start date), the system will not automatically update this date, but that will not affect the processing.



- 12. **Entry Source** This will show you where in the system the absence request was submitted and by who/type of user.
 - a. **Administrator Absence Event** Create and Maintain Absence Requests screen (Leave Keeper/HR Admin)
 - b. **Employee Absence Request** Employee Self Service (Employee)
 - c. Manager Absence Request Team Time (Supervisor)
- 13. **Status** Displays what stage of the approval process the absence is currently in. This value is also a link, which you can click to see the detail of who approved the request or who needs to approve it.
- 14. **Void** Click this checkbox, then click the **Forecast** or **Submit** button to void the absence request. NOTE: This is for informational purposes only and it is not recommended to check this box, instead **Cancel** the request if it is not correct or if adjustments need to be made.
- 15. "+" button If you want to submit additional absence requests, click this button to add more rows.

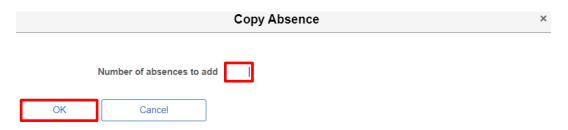
 NOTE: Do not overwrite or reuse a line for new inputs (i.e. adding another absence request for a different employee). The system will generate the following error message and will not allow you to proceed:

Employee ID/Record Number Cannot Be Changed on Existing Leave Request (20020,8)

The leave request on which you have changed the Employee ID and/or Employee Record Number has already been saved to the database. You can add a new row and enter a new request for a different employee, but you cannot overtype the information on an existing leave request.



- 16. To choose all rows for action, click the **Select All** link. To uncheck all rows, click the **Deselect All** link.
- 17. Click the checkbox in the **Select** column next to an absence request and click the **Copy Absence** button to duplicate the row's values. When you click this the **Copy Absence** window will appear prompting you to enter a numerical value for **Number of absences to add** in the text field, click the **OK** (or Cancel) button to add *x* amount of absences:



18. Click the checkbox in the **Select** column next to an absence request and click the **Delete** button to delete the request. NOTE: <u>Do not delete absence requests unless instructed to do so.</u>



19. **Comments** – Enter comments to briefly explain why the transaction is being submitted. NOTE: This field will mass apply comments if there are multiple rows or requests being submitted. To enter individual comments to each row/request, use the **Comments Tab**.

SUBMISSION OPTIONS



- 1. **Override Forecast Eligibility** Selecting this option will ignore forecasting requirements meaning the system will skip confirming if the employee has sufficient absence balance to cover their request. NOTE: It is not recommended to check this box.
- 2. **Submit Option** Define how to route an absence request. Either to the employee's supervisor for approval (**Use Absence Name Default**) or approve automatically (**Approve Automatically**).
- 3. Click the Forecast button to run the forecasting process and determine if an employee is ELIGIBLE or INELIGIBLE to request the absence. During forecasting the system will determine if the employee has enough absence balance to cover their request (ELIGIBLE). This is based on existing absence requests the employee has and their entitlements. If the employee does not have sufficient absence balance, their absence request will need to be adjusted or the system may generate LWOP (INELIGIBLE). NOTE: The system will allow users to submit an absence request even if forecasting comes back INELIGIBLE. However, users can check the Forecast Tab to review forecasting details related to the request before submitting. The system also considers saved absence requests during the forecasting process and it is recommended to make sure all saved requests are submitted or deleted to ensure accurate forecasting.
- 4. Click the **Submit** button when you are ready to submit the absence request. The system will route the absence request approval according to the **Submit Option** that was selected.

PARTIAL DAYS TAB



Use this tab to enter partial day information for an absence request.



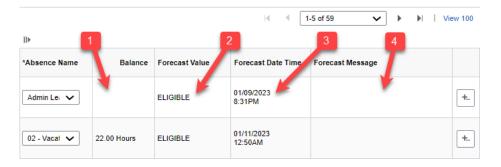


- 1. **All Days** Check this box to indicate that all days of the absence request are partial days. Enter the number of partial day hours in the **Start Day Hours** field.
- 2. **Start Day Hours** The employee is taking a partial day off on the first day of their absence request only. Enter the number of hours for the partial day absence in the text field. NOTE: When you enter a value in this field, the **Start Half Day** checkbox becomes unavailable.
- 3. **Start Half Day** For informational purposes only, the State does not use this feature. If an employee took a half day on the first day of their absence, use the **Start Day Hours** field and enter the number of hours in the text field.
- 4. **End Day Hours** The employee is taking a partial day off on the last day of their absence request only. Enter the number of hours for the partial day absence in the text field. NOTE: When you enter a value in this field, the **End Half Day** checkbox becomes unavailable.
- 5. **End Half Day** For informational purposes only, the State does not use this feature. If an employee took a half day on the last day of their absence, use the **End Day Hours** field and enter the number of hours in the text field.

FORECAST TAB



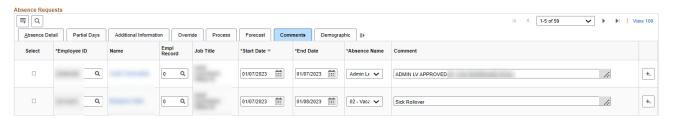
View forecast details related to a specific absence request for an employee. You can see the employee's absence balance and date/time stamp of when forecasting was performed. NOTE: Reforecasting after making changes, prompts the system to overwrite the previous forecast data each time.





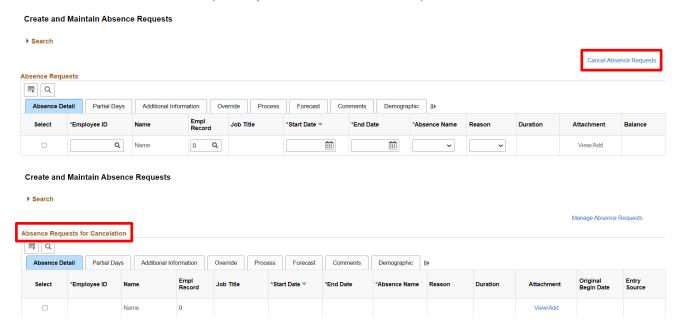
- 1. **Balance** View the employee's absence balance as of the last payroll that was finalized. (NOTE: The screenshot above is of an exception scenario, there is no remaining balance as the absence request was to use Administrative Leave that was granted.)
- 2. **Forecast Value** This will show if the employee is **ELIGIBLE** or **INELIGIBLE** to take leave.
- 3. Forecast Date Time Date/Time stamp of when the absence request was last forecasted.
- 4. **Forecast Message** There won't be any data unless there are error messages related to the absence request, which will appear here.

COMMENTS TAB



Leaving a comment can provide additional information and help other users understand why an absence request may have been canceled or submitted. Click this tab to view any comments associated with specific absence requests or attach additional comments if necessary for future reference.

CANCEL ABSENCE REQUESTS/MANAGE ABSENCE REQUESTS



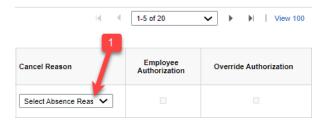
Click the **Cancel Absence Requests** link to navigate to the **Absence Requests for Cancelation** grid or to return the **Absence Requests** grid, click the **Manage Absence Requests** link. NOTE: Each time you toggle back and forth, you'll see a warning message like the one below:



The Absence Requests Grid will be reloaded and any unsaved data will be lost. Choose Yes to continue, or No to go back and save.



The grid will be cleared, and the search results reselects based off what was saved in the search parameters.



1. **Cancel Reason** – Select the reason **Not Valid** from the dropdown menu.



2. Click the **Submit for Cancelation** button to submit the cancellation of the selected absence request. The system will route the cancellation approval according to the **Submit Option** that was selected.

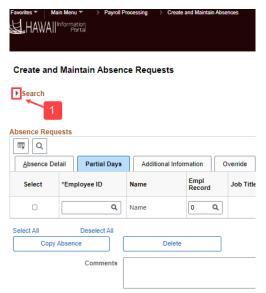
NOTE: <u>Do not submit an absence cancelation request multiple times</u> (i.e. employee cancels request through ESS and Leave Keeper cancels the same request on Create and Maintain Absence Requests screen), this will generate a silent error in the system and cause processing issues. A helpful tip to avoid this is to check the absence request **Status**. If an action status is "Pending" wait until it is completed before starting a new one (see also Absence Detail, page 8).

USING THE CREATE AND MAINTAIN ABSENCE REQUESTS SCREEN

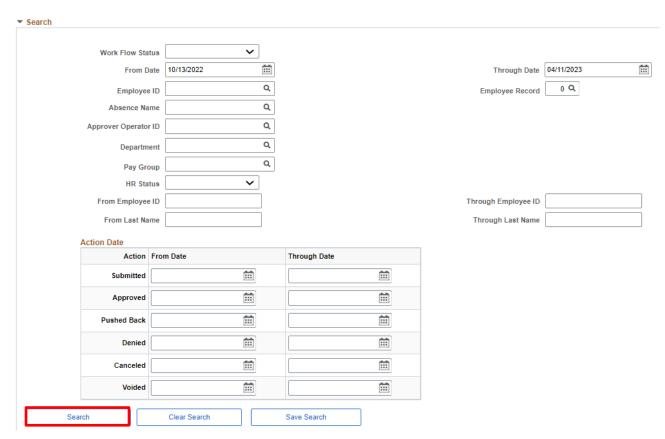
SEARCH FOR AN EXISTING ABSENCE REQUEST

Find an existing absence request by expanding the search function at the top of the screen. There are many criteria available to help narrow results, but an easy way to search is to define the **From/Through Date**, **EMPL ID** and **EMPL RCD**. NOTE: Saving search parameters will override the default From/Through Dates which are 3 months before and 3 months after the current date. Additionally, make sure to clear any search parameters that may have been saved before starting a new session to prevent processing errors.



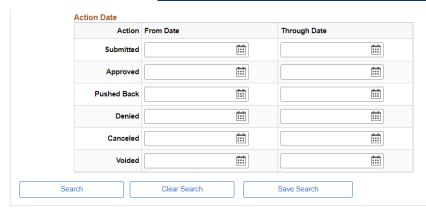


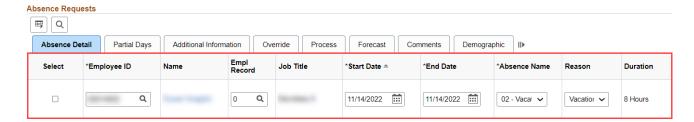
1. Click on the carrot icon to expand the **Search** section.



2. Enter your search criteria, then click the **Search** button.

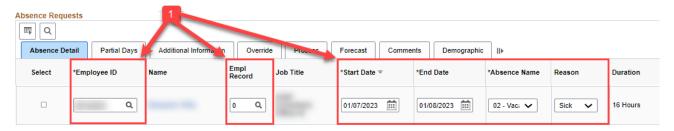






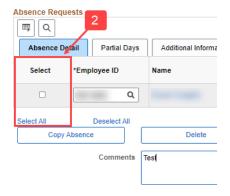
3. Scroll down to the **Absence Requests** section to find the request you are looking for from the list of results.

EDIT AN EXISTING ABSENCE REQUEST

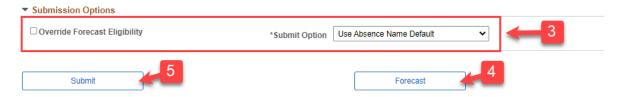


1. After finding the applicable absence request, review or edit it as needed. NOTE: It is not recommended to submit something that is still in submitted status as it may cause errors. Double check the status and see who the request may be pending on.



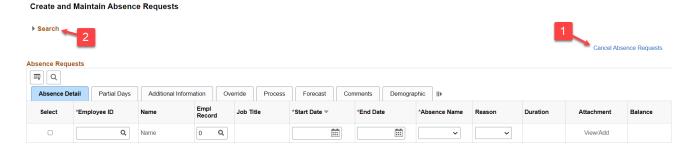


2. Remember to click on the checkbox for the appropriate row or click **Select All** for all rows when ready to submit changes. NOTE: You will be prompted if no rows are selected.



- 3. Before submitting, scroll down to use the fields in the **Submission Options** section to determine how the system processes the absence request.
- 4. Click the **Forecast** button to check if the employee is eligible to take leave. After forecasting, click the **Forecast Tab** to review the forecasting results and see if the employee is **Eligible** or **Ineligible** to take leave.
- 5. Click the **Submit** button when ready to resubmit the absence request.

CANCEL AN EXISTING ABSENCE REQUEST



- 1. Click on the Cancel Absence Requests link to the right-hand side of the Absence Requests section.
- 2. Expand the **Search** section and enter search parameters to find an existing leave request.
- 3. Scroll down to see the search results listed in the **Absence Requests** section.



Manage Absence Requests

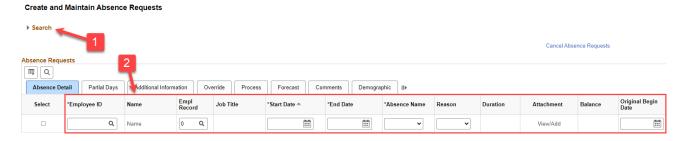
Absence Requests for Cancelation ■ Q Absence Detail Additional Information Process Forecast Comments Partial Days Demographic Original Begin Date Employee ID Job Title *Start Date = *End Date *Absence Name Status Cancel Reason Administra V 11/14/2022 11/14/2022 02 - Vacation 11/14/2022 Not Valid ~ Absence Event lect All Deselect All 20 Comments ▼ Submission Options *Submit Option Use Absence Name Default

- 4. Click on the checkbox for the appropriate row or click **Select All** for all rows when ready to cancel a request.
- 5. From the drop-down menu under the **Cancel Reason** column, select the option **Not Valid** and add any **Comments** if necessary.
- 6. In the **Submission Options** section, select a **Submit Option** to determine how the system processes the cancelation. Then click the **Submit For Cancelation** button when ready to cancel the request.

NOTE: <u>Do not submit an absence cancelation request multiple times</u> (i.e. employee cancels request through ESS and Leave Keeper cancels the same request on Create and Maintain Absence Requests screen), this will generate a silent error in the system and cause processing issues. A helpful tip to avoid submitting multiple actions for the same absence request is to check the **Status**. If an action status is "Pending" wait until it is completed before starting a new one (see also Absence Detail, page 8).

ENTER A NEW ABSENCE REQUEST (ABSENCE DETAIL TAB)

Submit For Cancelation



- 1. Expand the **Search** section and clear any parameters that may have been saved.
- 2. From the **Absence Requests** section, **Absence Detail** tab, enter the request details.

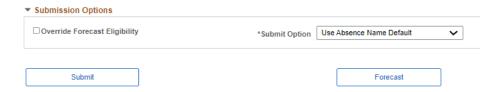




3. If you need to add additional absences, click on the "+" icon. NOTE: <u>Do not overwrite or reuse a line for new inputs (i.e. adding another absence request for a different employee)</u>. The system will generate an error message and will not allow you to proceed.

Create and Maintain Absence Requests ▶ Search Absence Requests ij, Q Absence Detail Partial Days Additional Information Empl Select *Employee ID Record Q Q Name 0

4. Click on the checkbox next to the absence request you would like to submit or click the **Select All** link to select all absence requests to submit. NOTE: You will be prompted if no rows are selected.

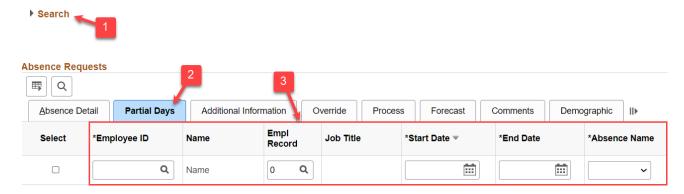


5. Scroll down to use the fields in the Submission Options section to determine how the system processes the absence request. Click the Forecast button and review the results on the Forecasting Tab to ensure the employee is ELIGIBLE to take leave. Then click the Submit button when ready to submit the absence request.

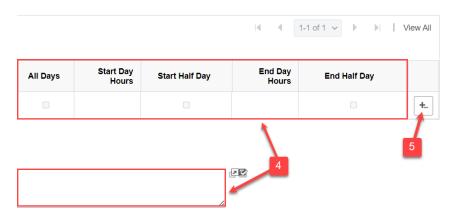


ENTER A PARTIAL DAY ABSENCE REQUEST (PARTIAL DAYS TAB)

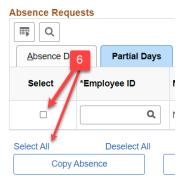
Create and Maintain Absence Requests



- 1. Expand the **Search** section and clear any parameters that may have been saved.
- 2. From the Absence Requests section, click the Partial Days tab.
- 3. Enter the request details such as the EMPL ID, EMPL RCD, Start/End Dates and Absence Name.



- 4. Then select/enter the partial day absence request details and enter any **Comments**. NOTE: Various combinations of partial day options can be entered to accommodate employee absences.
- 5. If you need to add additional absences, click on the "+" button. NOTE: <u>Do not overwrite or reuse a line for new inputs (i.e. adding another absence request for a different employee)</u>. The system will generate an error message and will not allow you to proceed.





6. Click on the checkbox next to the absence request you would like to submit or click the **Select All** link to select all absence requests to submit. NOTE: You will be prompted if no rows are selected.



7. Scroll down to use the fields in the **Submission Options** section to determine how the system processes the absence request. Click the **Forecast** button and review the results on the **Forecasting Tab** to ensure the employee is **ELIGIBLE** to take leave. Then click the **Submit** button when ready to submit the absence request.

EXAMPLES OF PARTIAL DAY ABSENCE REQUESTS

Salaried employee assigned the default work schedule (Mon – Fri 8) taking partial, consecutive days off from 12/27/2022 – 12/30/2022.



December 2022

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
25	26	27	28	29	30	31
		2 hrs.	2 hrs.	2 hrs.	2 hrs.	



Salaried employee assigned the default work schedule (Mon – Fri 8) taking a partial day off on the first day only and full days off for the remainder of their request from 12/27/2022 - 12/30/2022.



December 2022

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
25	26	27	28	29	30	31
		2 hrs.	8 hrs.	8 hrs.	8 hrs.	

Salaried employee assigned the default work schedule (Mon – Fri 8) taking a partial day off on the last day of their request from 12/27/2022 – 12/30/2022.



December 2022

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
25	26	27	28	29	30	31
		8 hrs.	8 hrs.	8 hrs.	2 hrs.	