

HIP Time and Leave Refresher Training

January 23, 2023



Department of Accounting and General Services in coordination with the

Office of Enterprise Technology Services

TOPICS

- 1. Create and Maintain Absence Requests
 - Overview and Navigation
 - Page Layout and notable areas
 - Search
 - Absence Requests Tabs
 - Absence Detail/Partial Days/Forecasting/Comments
 - Cancel Absence Request link
 - Managing absence requests
 - Search/edit/cancel/add new request/add partial day request
 - Important notes
 - Online resources



CREATE AND MAINTAIN ABSENCE REQUESTS OVERVIEW

The Create and Maintain Absence Requests screen is available to **Leave Keepers** and **HR Admins** to view and manage regular absence requests on behalf of your employees.

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Navigation: NavBar > Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences

CREATE AND MAINTAIN ABSENCE REQUESTS SEARCH FEATURE

Find existing absence requests by expanding the search feature at the top of the screen and defining various criteria.

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CREATE AND MAINTAIN ABSENCE REQUESTS SEARCH FEATURE – COMMON SEARCH CRITERIA

- 1. From/Through Date Search by date range
- 2. Employee ID/Record Search by 8-digit EMPL ID/EMPL RCD (0, 1, etc.)
- 3. Search Prompt search for absence requests based off the criteria entered
- 4. Clear Search Clear what was entered or previously saved criteria
- 5. Save Search Save search parameters that were entered. <u>NOTE: This is not</u> recommended as it will overwrite default search values.

CREATE AND MAINTAIN ABSENCE REQUESTS USING THE SEARCH FEATURE CONTD.

If absence request details are outside the Search criteria, the system will generate a warning message.

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CREATE AND MAINTAIN ABSENCE REQUESTS USING THE SEARCH FEATURE

Scenario: Find an existing 8-hour vacation request for an employee on 11/14/22 using the date range 11/01/22 – 11/15/2022, EMPL ID and EMPL RCD 0.

CREATE AND MAINTAIN ABSENCE REQUESTS USING THE SEARCH FEATURE CONTD.

Narrow your results by entering **Search** criteria.

- 1. Expand the **Search** section
- 2. Enter the **From Date 11/01/22**
- 3. Enter the **Through Date 11/15/22**
- 4. Enter the **Employee ID**
- 5. System defaults to **Employee Record 0**
- 6. Click the **Search** button

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Search	Clear Search	Save Search		

CREATE AND MAINTAIN ABSENCE REQUESTS USING THE SEARCH FEATURE CONTD.

Scroll down to the **Absence Requests** section to view search results.

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

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- 1. Select Check this box to select the corresponding row for action
- 2. Employee ID 8-digit EMPL ID
- 3. Name System will display the employee name associated with the EMPL ID entered
- 4. **EMPL Record** This automatically defaults to "0", if employee has multiple EMPL Records, you must enter the correct one that corresponds to your department
- 5. Start/End Date Enter the date range for the absence request



- 6. Absence Name Select an absence name from the dropdown menu (i.e. sick, etc.)
- Reason For informational purposes only. Defines why an absence was taken.
 Available reasons depend on what was selected in the Absence Name field
- 8. Duration System calculates and displays the absence length in hours
- Attachment Click the View/Add link to view, add or delete backup documentation. NOTE: Do not include any PII.
- 10. Balance System calculates and displays the employee's absence balance as of the last payroll that was finalized



- 11. Original Begin Date For informational purposes only. Defaults to the Start Date of the absence request
- 12. Entry Source Will show where in the system the absence request was submitted and by who/type of user
- 13. Status Displays what stage of the approval process the absence is currently in
- 14. Void For informational purposes only. <u>NOTE: The State does not use this feature,</u> instead **Cancel** a request if it is not correct or adjustments are needed
- 15. "+" button Click this button if you want to submit additional absence requests.



- 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. A window will appear prompting you to enter a numerical value for rows to add.
- 18. Click the checkbox in the **Select** column next to an absence request and click the **Delete** button to delete the request. <u>NOTE: Do not delete absence requests unless instructed to do</u> <u>so.</u>
- **19. Comments** Enter comments as a brief explanation. NOTE: This field will mass apply comments if there are multiple rows or requests being submitted. To enter individual comments to each row, use the **Comments Tab**

CREATE AND MAINTAIN ABSENCE REQUESTS COMMENTS TAB

View and add comments corresponding to specific absence requests.

Create and Maintain Absence Requests

Search

Absence Requests

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CREATE AND MAINTAIN ABSENCE REQUESTS USING THE COMMENTS TAB

If you have multiple absence requests that you would like to leave unique comments for, click the **Comment** field corresponding to the specific request and enter comments.

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Use the **Submission Options** fields to define how the system processes the request.

Submission Options Override Forecast Eligibility	*Submit Option Use Absence Name Default	
Submit 4	Forecast	

- 1. Override Forecast Eligibility Selecting this option will skip the forecasting process. NOTE: It is not recommended to check this box.
- Submit Option Pick how to route absence requests. Either to the employee supervisor for approval (Use Absence Name Default) or approve automatically (Approve Automatically)
- Click the Forecast button to run the forecasting process and view results on the Forecast Tab
- 4. Click the **Submit** button when you are ready to submit the absence request

CREATE AND MAINTAIN ABSENCE REQUESTS FORECAST TAB

View forecasting results corresponding to absence requests including available employee balances to help determine if they are eligible to take leave.

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Select	*Employee ID	Name	Empl Record	Job Title	*Start Date ≜	*End Date	*Absence Name
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CREATE AND MAINTAIN ABSENCE REQUESTS USING THE FORECAST TAB

After forecasting you may view an employee's current absence **Balances**, **Forecast Value** to see if the employee is **ELIGIBLE/INELIGIBLE** to request an absence, the **Forecast Date Time**, and **Forecast Messages** on the Forecast tab

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CREATE AND MAINTAIN ABSENCE REQUESTS MANAGING ABSENCES – ENTERING A NEW REQUEST

Scenario: Enter a new 8-hour vacation request dated 11/14/22 on behalf of an employee and submit it for supervisor approval.

CREATE AND MAINTAIN ABSENCE REQUESTS MANAGING ABSENCES – ENTERING A NEW REQUEST CONTD.

Clear any parameters that may have been saved in the Search section.

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CREATE AND MAINTAIN ABSENCE REQUESTS MANAGING ABSENCES – ENTERING A NEW REQUEST CONTD.



- 1. Enter the Employee ID
- 2. Enter the Empl Record
- 3. Enter the Start/End Date of 11/14/2022
- Select the Absence Name 02 Vacation from the dropdown menu
- 5. Select a **Reason** (this is optional)
- 6. Add any **Comments** if necessary
- 7. Click the checkbox under the Select column
- Select the Submit Option Use Absence name Default
- 9. Click the **Forecast** button, review results on the **Forecast Tab**, then click the **Submit** button

CREATE AND MAINTAIN ABSENCE REQUESTS MANAGING ABSENCES – EDITING AN EXISTING REQUEST

Scenario: Find an employee's existing 8-hour vacation request dated 11/14/22, change the date to 11/15/22 and resubmit it for supervisor approval.

CREATE AND MAINTAIN ABSENCE REQUESTS MANAGING ABSENCES – EDITING AN EXISTING REQUEST CONTD.

Expand the Search feature and enter parameters to find the existing request.



- 1. Enter the From Date of 11/01/22
- 2. Enter the Through Date of 11/15/22
- 3. Enter the **Employee ID**
- 4. The **Employee Record** defaults to **0**
- 5. Click the **Search** button

CREATE AND MAINTAIN ABSENCE REQUESTS MANAGING ABSENCES – EDITING AN EXISTING REQUEST CONTD.

Edit the absence request details in the **Absence Details** tab and resubmit.



- Change the **Start/End Dates** to **11/15/2022**
- 2. Enter any **Comments** necessary
 - Click the checkbox under the **Select** column
 - . Select the **Submit Option Use Absence** Name Default
- Click the Forecast button, review results on the Forecast Tab, then click the Submit button

CREATE AND MAINTAIN ABSENCE REQUESTS MANAGING ABSENCES – CANCEL AN EXISTING REQUEST

Scenario: Find an employee's existing 8-hour vacation request dated 11/14/22 and Cancel it.

CREATE AND MAINTAIN ABSENCE REQUESTS MANAGING ABSENCES - CANCEL AN EXISTING REQUEST CONTD.

Switch to the Absence Requests for Cancelation grid and Search for the request to Cancel.

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Select	*Employee ID	Name	Empl Record	Job Title	*Start Date ≜		*End Date		*Absen	nce Name	Reason	Duration	Attachment	Balance
	٩	Name	0 Q					••••		~	~		View/Add	

- 1. Click on the **Cancel Absence Requests** link
- 2. Then click the carrot icon to expand the **Search** feature to enter parameters and narrow your search results

CREATE AND MAINTAIN ABSENCE REQUESTS MANAGING ABSENCES - CANCEL AN EXISTING REQUEST CONTD.

Enter the Cancelation details in the Absence Details tab and submit.



- 3. From the drop-down menu under the Cancel Reason column, select the option Not Valid
- 4. Enter any **Comments** if necessary
- 5. Click the checkbox under the **Select** column
- 6. Select the Submit Option Use Absence Name Default
- 7. Click the **Submit For Cancelation** button

CREATE AND MAINTAIN ABSENCE REQUESTS PARTIAL DAYS TAB

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

Create and Maintain Absence Requests											
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CREATE AND MAINTAIN ABSENCE REQUESTS PARTIAL DAYS TAB - ABSENCE REQUEST OPTIONS

- All Days Check this box to indicate that all days of the absence request are partial days. Then 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 request in the text field.
- 3. Start Half Day For informational purposes only. If an employee took a half day on the first day of their absence, use the Start Day Hours field to 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. Enter the number of hours of the partial day absence in the text field.
- 5. End Half Day For informational purposes only. If an employee took a half day on the last day of their absence, use the End Day Hours field to enter the number of hours in the text field.



CREATE AND MAINTAIN ABSENCE REQUESTS MANAGING ABSENCES – ENTERING A PARTIAL DAY REQUEST

Scenario: Enter an employee's Partial Day vacation request from 12/27/22 – 12/30/22 and submit it for supervisor approval. Employee is taking partial day off (2 hours) on the first day of their request and full days off (8 hours/day) the remainder of their request.

December 2022

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

CREATE AND MAINTAIN ABSENCE REQUESTS MANAGING ABSENCES – ENTERING A PARTIAL DAY REQUEST CONTD.



- 1. Clear any parameters that may have been saved on the **Search** feature
- 2. Click the **Partial Days** tab
- 3. Enter the **EMPL ID** and **EMPL RCD**
- 4. Enter the Start Date 12/27/22, End Date 12/30/22 and select the Absence Name 02 Vacation
- 5. Enter **2 hours** in the **Start Day Hours** field
- 6. Select the checkbox under the **Select** column

CREATE AND MAINTAIN ABSENCE REQUESTS MANAGING ABSENCES – ENTERING A PARTIAL DAY REQUEST CONTD.

Select All Deselect All		
Copy Absence	Delete	
Comments		
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Override Forecast Eligibility	*Submit Option Use Absence Name Default	
	9	
Submit	Forecast	

- 7. Enter any **Comments** if necessary
- 8. Select the **Submit Option Use Absence Name Default**
- 9. Click the **Forecast** button, review results on the **Forecast Tab**, then click the **Submit** button

CREATE AND MAINTAIN ABSENCE REQUESTS IMPORTANT NOTES

- 1. Do not save any search criteria/clear search criteria before each session
- 2. Make sure an absence request's **Start/End Dates** fall within the **Search** date range
- 3. Use the "+" button to add more absence requests
- 4. If a request is incorrect or needs adjustment, **Cancel** it instead of deleting or voiding
- 5. Check the absence request **Status** and do not work on requests that are **Pending**
- 6. The Create and Maintain Absence Requests screen is separate from the Administer Extended Absences screen.
- 7. Do not click on the Override Forecasting checkbox

CREATE AND MAINTAIN ABSENCE REQUESTS ONLINE RESOURCES

- 1. Helpful Knowledge articles for Leave Keepers covering the Create and Maintain Absence Requests screens can be found here: <u>https://ags.hawaii.gov/hip/for-time-leave-keepers/</u>
- 2. Create and Maintain Absence Requests quick reference guide: https://ags.hawaii.gov/hip/files/2023/01/Create-and-Maintain-Absence-Requests.pdf
- 3. Mandatory self-paced training for Leave Keepers: <u>https://files.hawaii.gov/dags/hip/120/story.html</u>



MAHALO FOR YOUR TIME!

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