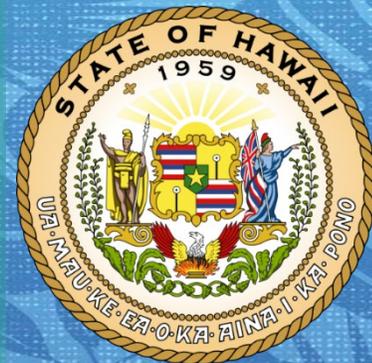




HIP Time and Leave Refresher Training

January 23, 2023



Department of Accounting and General Services
in coordination with the
Office of Enterprise Technology Services

TOPICS

1. Forecasting

- Navigation – Employee Section
- Using Your Paid Leave as Soon as You Accrue it
- Finding Today's Balance
- Finding a Future Balance
- UPW Example
- Timing
- Navigation – Supervisor Section
- Supervisor Finding Today's Balance for an Employee
- Supervisor Finding a Future Balance for an Employee
- HR Admin/Leave Keeper forecasting for an Employee
- Helpful Tips

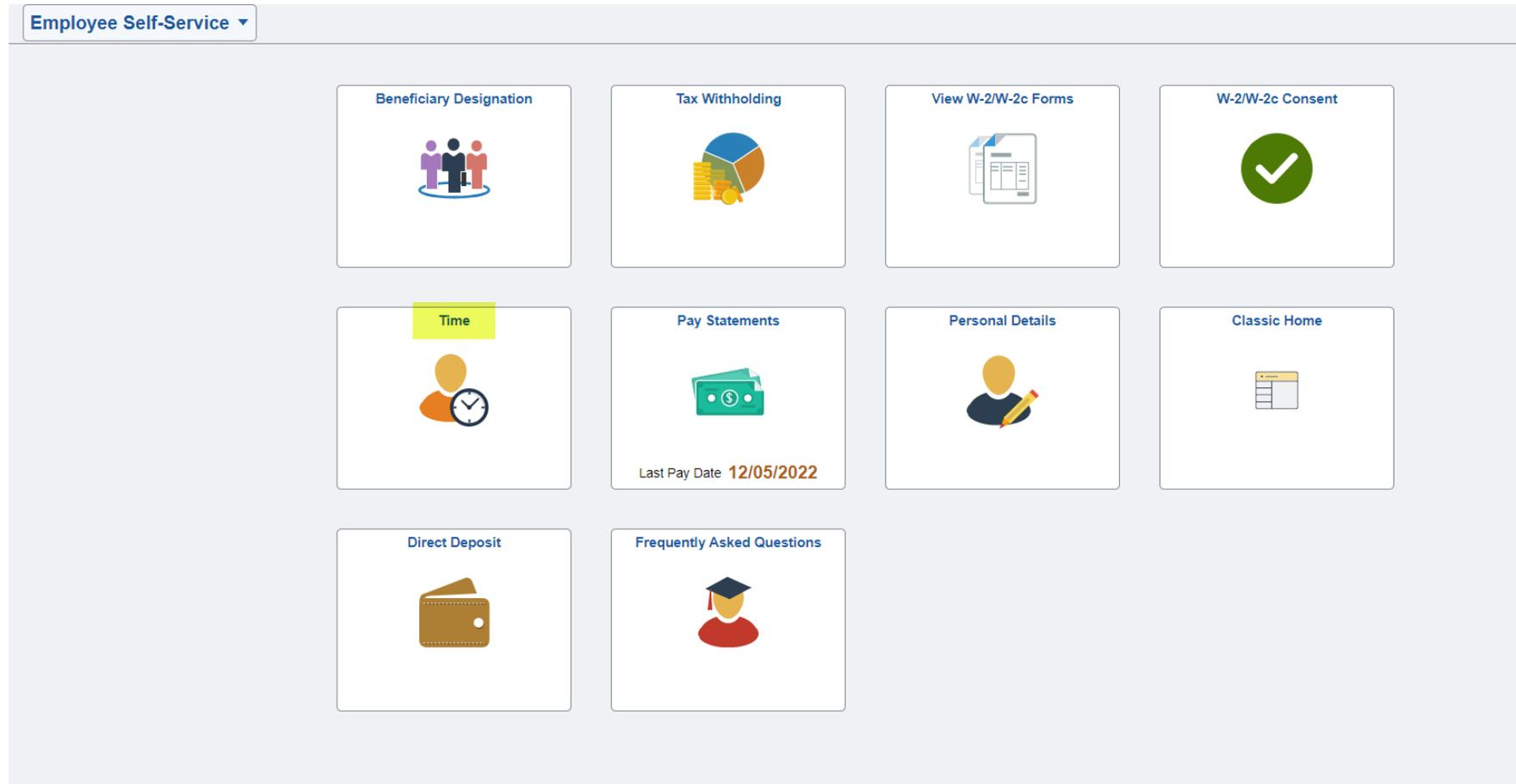


DISCLAIMER

- The specific scenarios outlined in this training have been simplified for training purposes.
- Figures used to illustrate payment information is fictitious for training purposes.
- As individual employees' circumstances and situations are different, please consult with your HR Authority for specific guidance on entering employee data.

Forecasting Navigation – Employee Section

Log on to HIP, then Navigate to the Time tile, under Employee Self-Service (ESS):



Forecasting Navigation – Employee Section Continued

- Navigate to the Absence Balances tile:

The screenshot displays a dashboard titled "Time" with a grid of tiles. The tiles are arranged as follows:

- Overtime Requests:** Icon of a document with a checkmark.
- Enter Time:** Period 12/01/22 - 12/15/22. A red progress bar is shown. Legend: Reported 0.00 (green dot), Scheduled 96.00 (red dot).
- Weekly Time:** Period 11/27/22 - 12/03/22. Legend: Reported 0.00 (green dot), Scheduled 40.00 (red dot).
- Comp Time:** Balance Hours: 0.00.
- Request Absence:** Icon of a briefcase.
- Cancel Absences:** Icon of a briefcase with a red 'X' over it.
- View / Modify Requests:** Icon of a briefcase and a calendar.
- Absence Balances:** Icon of a briefcase and a scale of justice. This tile is highlighted with a yellow background.
- Extended Absence Request:** Icon of a briefcase and a clock.
- Time Summary:** Period 12/01/22 - 12/15/22. Status: No Time Reported.

Using Your Paid Leave as Soon as You Accrue it

- Normally employees earn their entitlements or accruals when the second half of the month closes. Certain exceptions may apply however, and in accordance with union contract provisions:
 - a. An entitlement may be *reduced* in circumstances where you took unpaid time off from work in the month such as LWOP, or when your department has you on a leave of absence during the month.
 - b. An entitlement may be *delayed* if you were on leave when the entitlement would occur at the end of the month, in which case you would receive the entitlement when you return from that leave again. Note that the system needs at least one day to recognize that you have returned from your leave.

Using Your Paid Leave as Soon as You Accrue it Continued

- c. Sick entitlement are credited to UPW members who "earn as they go" meaning that they receive sick entitlements more often and their credited sick time will post at the end of each pay period.
- Even though HIP displays the absence balances as of the last payroll that was processed, employees may utilize the paid leave as soon as it is earned, and HIP will not prevent an employee from requesting to use earned leave using the Request Absence tile.

Forecasting – Finding Today's Balance

- Note what your balances were as of the last payroll that was processed. For instance, this employee's Vacation Balance is 160 hours as of 11/15/2022. Today is 12/3/2022. Let's find out how much they earned as today, 12/3/2022.

< Time		Balances	
Vacation Leave Receive Ent			
As Of 11/15/2022		0.00 Hours	
Sick Earn as you go Balance			
As Of 11/15/2022		0.00 Hours	
Vacation Balance			
As Of 11/15/2022		160.00 Hours	
Sick Balance			
As Of 11/15/2022		396.00 Hours	

**Disclaimer The current balance does not reflect absences that have not been processed.

▶ **Forecast Balance**

Finding Today's Balance Continued

- Expand the Forecast Balance menu. To know what the vacation balance was as of 12/03/2022 input that date in the As of Date field. Enter Absence Name 02 – Vacation, and press Forecast Balance.

Forecast Balance

As of Date 12/03/2022 

Filter by Type All 

*Absence Name 02 - Vacation  Current Balance 160.00 Hours**

[Forecast Balance](#) [View Forecast Details](#)

Finding Today's Balance Continued

- Review the information the system displays as the "Vacation Balance" on the top row. The employee's balance as of 12/3/22 is 174 hours, 14 more hours from the original vacation balance of 160 at the start of November. This means that the employee had not taken any vacation from 11/1/2022 to 11/30/2022 and will receive the 14-hour accrual for the month. Note, they have not received their November entitlement because the month of November has not finalized yet.

Forecast Details	
Vacation Balance 01/01/2022 - 12/31/2022	174.00
Vacation Entitlement Adj YTD 01/01/2022 - 12/31/2022	0.00
Vacation Entitlement YTD 01/01/2022 - 12/31/2022	154.00
Vacation Entitlement Take YTD 01/01/2022 - 12/31/2022	212.00

Note: Vacation Entitlement YTD will also update as you can see 14-hour accruals X 11 months = 154.00 hours. Vacation Entitlement Take YTD shows 212.00, which was what Vacation was taken year to date.

Forecasting – Finding a Future Balance

- Let's say today's date is 11/23/2022 and I want to forecast my vacation into the next year, 2/1/2023. Here's how you would do that.
- Expand the Forecast Balance menu. To know what the vacation balance was as of 2/1/2023, input that date in the As of Date field. Enter Absence Name 02 - Vacation, and press Forecast Balance.

▼ Forecast Balance

As of Date 

Filter by Type ▼

*Absence Name ▼ Current Balance 160.00 Hours**

[View Forecast Details](#)

Finding a Future Balance Continued

- A window will pop up showing you that, although you had 160.00 hours as of the date of the last payroll, 11/15/2022, the forecast for your Vacation Balance as of the date you picked – 2/1/2023 - will be a balance of 202.00 hours.

Forecast Details		x
Vacation Balance 01/01/2023 - 12/31/2023	202.00	
Vacation Entitlement Adj YTD 01/01/2023 - 12/31/2023	0.00	
Vacation Entitlement YTD 01/01/2023 - 12/31/2023	14.00	
Vacation Entitlement Take YTD 01/01/2023 - 12/31/2023	0.00	

Note: Vacation Entitlement YTD starts over each year, this is showing your 14-hour accrual for the month of January.

Finding a Future Balance Continued

- The employee's vacation balance as of February 1, 2023, is 202 hours, considering that the employee had an original vacation balance of 160 hours as of 11/15/2022.

Balance as of 11/15:	160.00 hours
Plus, expected Vacation accrual for November:	+ 14.00 hours
Plus, expected Vacation accrual for December:	+ 14.00 hours
Plus, expected Vacation accrual for January:	+ 14.00 hours
Total Expected Vacation Balance as of February 1, 2023	= 202.00 hours

UPW Example

[← Time](#) [Balances](#)

Vacation Leave Receive Ent As Of 12/15/2022	<i>(Any Donated Leave that the employee may have.)</i>	0.00 Hours
Sick Earn as you go Balance As Of 12/15/2022	<i>(This employee has a Sick Earn as you go Balance of 2103.00 Hours as of 12/15/2022.)</i>	2103.00 Hours
Vacation Balance As Of 12/15/2022	<i>(This employee has a Vacation Balance of 874.00 Hours as of 12/15/2022.)</i>	874.00 Hours
Sick Balance As Of 12/15/2022	<i>(You will still see a Sick Balance of 0.00 Hours just in case the employee was to transfer out of that Union.)</i>	0.00 Hours

****Disclaimer** The current balance does not reflect absences that have not been processed.

Forecast Balance

As of Date 

Filter by Type 

*Absence Name  Current Balance 0.00 Hours**

[View Forecast Details](#)

Let's forecast the Sick as of Date as 01/16/2023.

UPW Example Continued

Forecast Details			x
Sick Balance 01/01/2023 - 12/31/2023	(Current Sick Balance)	0.00	
Sick Entitlement Adj YTD 01/01/2023 - 12/31/2023	(Total Sick Adjustments Year to Date)	0.00	
Sick Entitlement YTD 01/01/2023 - 12/31/2023	(Total Sick Earned Year to Date)	0.00	
Sick Entitlement Take YTD 01/01/2023 - 12/31/2023	(Total Sick Taken Year to Date)	0.00	
Sick Earn as you go Balance 01/01/2023 - 12/31/2023	(Current Sick Balance, this employee has 2123.00 hours.)	2123.00	
Sick Earn as you go ADJ YTD 01/01/2023 - 12/31/2023	(Total Sick Adjustments Year to Date)	0.00	
Sick Earn as you go ENT YTD 01/01/2023 - 12/31/2023	(Total Sick Year to Date, this employee currently has 14.00 hours, January's accrual.)	14.00	
Sick Earn as you go YTD TAKE 01/01/2023 - 12/31/2023	(Total Sick Taken Year to Date)	0.00	
CONVERSION SICK ADJ 01/01/2023 - 12/31/2023	(Total Sick Adjustments at Conversion)	0.00	
CONVERSION SICK BAL 01/01/2023 - 12/31/2023	(Total Sick Balance at Conversion)	0.00	

UPW Example Continued

- The employee's Sick Earn as you go Balance as of January 16, 2023, is 2123.00 hours, considering that the employee had an original sick balance of 2103.00 Hours as of 12/15/2022, here is how the system calculated this.

Balance as of 12/15:	2103.00 hours
Plus, expected Sick accrual for December:	+ 14.00 hours
Plus, expected Sick accrual for ½ month of January:	+ 8.00 hours
Minus, 2 hours of approved Sick on 1/4/23	- 2.00 hours
Total Expected Sick Balance as of January 16, 2023:	= 2123.00 hours

UPW Example Continued

Vacation Leave Receive Ent As Of 12/15/2022	0.00 Hours
Sick Earn as you go Balance As Of 12/15/2022	2103.00 Hours
Vacation Balance As Of 12/15/2022	874.00 Hours
Sick Balance As Of 12/15/2022	0.00 Hours

**Disclaimer The current balance does not reflect absences that have not been processed.

▼ Forecast Balance

As of Date 01/01/2023

Filter by Type All

*Absence Name 02 - Vacation

Current Balance 874.00 Hours**

Forecast Balance View Forecast Details

Now, let's forecast the
Vacation as of
Date 01/01/2023:

UPW Example Continued

Forecast Details ×		
Vacation Balance 01/01/2023 - 12/31/2023	<i>(Current Vacation Balance, this employees balance is 720.00 hours)</i>	720.00
Vacation Entitlement Adj YTD 01/01/2023 - 12/31/2023	<i>(Total Vacation Adjustments Year to Date)</i>	0.00
Vacation Entitlement YTD 01/01/2023 - 12/31/2023	<i>(Total Vacation Earned Year to Date)</i>	0.00
Vacation Entitlement Take YTD 01/01/2023 - 12/31/2023	<i>(Total Vacation Taken Year to Date)</i>	0.00
Vacation Leave Donation Ent 01/01/2023 - 12/31/2023	<i>(Total Vacation Leave Donated Year to Date)</i>	0.00
CONVERSION VAC ADJ 01/01/2023 - 12/31/2023	<i>(Total Vacation Adjustments at Conversion)</i>	0.00
CONVERSION VAC BAL 01/01/2023 - 12/31/2023	<i>(Total Vacation Balance at Conversion)</i>	0.00
CONVERSION VAC TAKE 01/01/2023 - 12/31/2023	<i>(Total Vacation Taken at Conversion)</i>	0.00

UPW Example Continued

- The employee's Vacation Balance as of January 01, 2023, is 720.00 hours, considering that the employee had an original vacation balance of 874.00 Hours as of 12/15/2022, here is how the system calculated this.

Balance as of 12/15:	874.00 hours
Plus, expected Vacation accrual for December:	+ 14.00 hours
Minus 42 Day Forfeiture for End of Year:	- 48.00 hours
Minus 720 Hour Forfeiture for End of Year:	- 120.00 hours
Total Expected Vacation Balance as of January 1, 2023:	= 720.00 hours

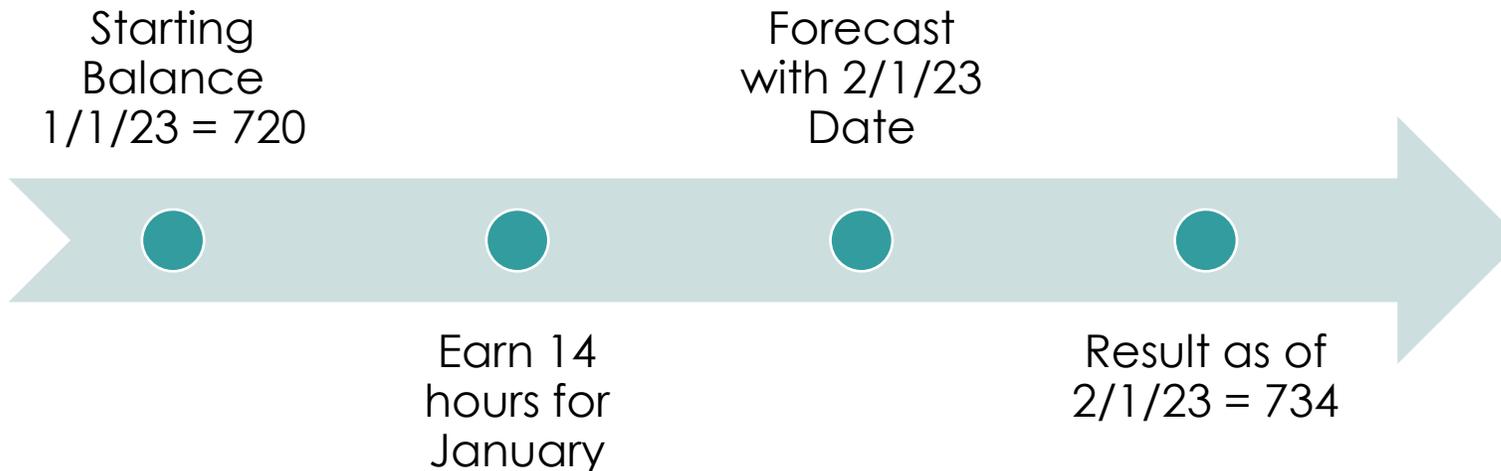
Note: This employee did not take the 48 hours required for the year and was over the 720-max amount, therefore they forfeited 154.00 hours vacation.

Timing

- The forecasting feature references a specific point in time and is based on a sequential order by calendar date. The results depend on what date is chosen and what requests are currently existing in the system up to that chosen date. Forecasting results are also impacted by the following:
 - Leave requests that have not yet been approved
 - Year-end forfeiture
 - Retroactive leave not entered in HIP
- For example, choosing to forecast vacation as of 2/1/2023 today will consider all requests of that type currently recorded in the system up to 2/1/2023 to provide a result. But if you forgot to input a vacation or sick request for 16 hours from December 19-20, 2022, system doesn't know that and cannot include that as a part of today's forecasting result.
- Therefore, it's recommended to review your future requests if you need to enter old leave request since changes in the past can cause a future request to become ineligible.

Timing Example

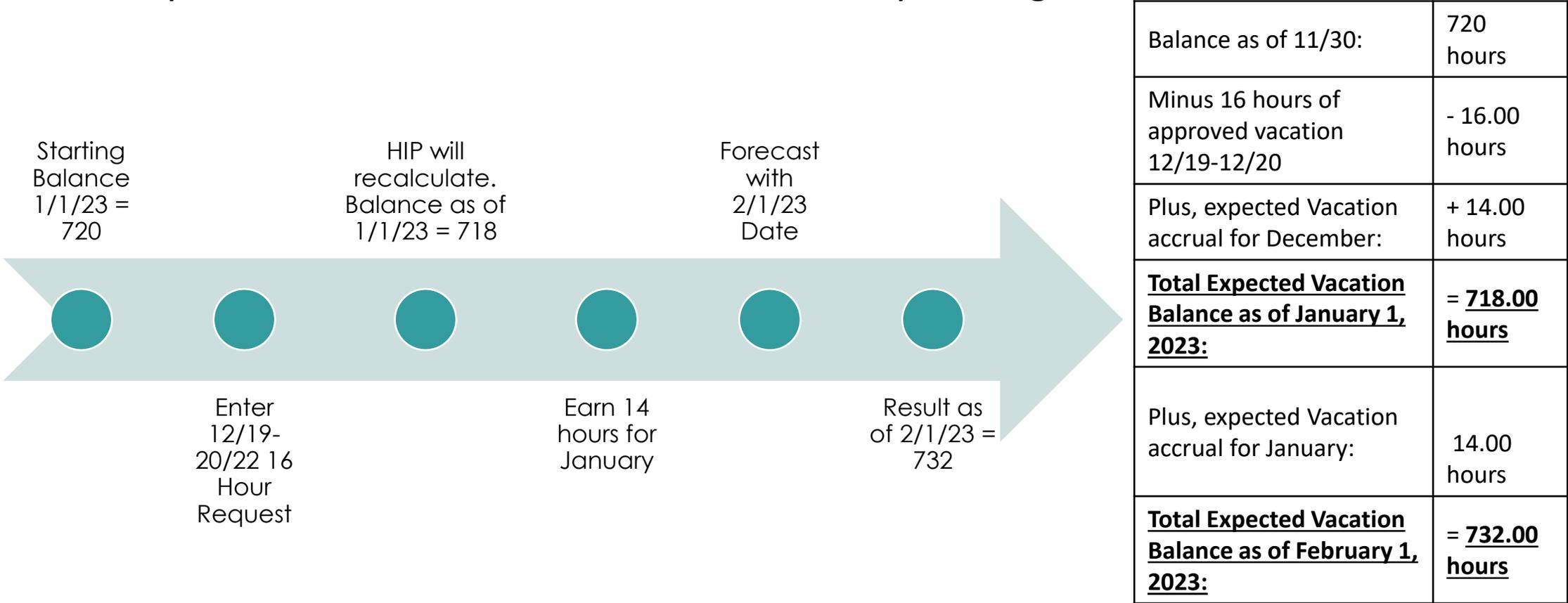
- Today is January 23, 2023. The below graphics illustrates a scenario of an employee that had 720 hours as of 11/30/22 and is forecasting for February 1, 2023. Note that since no leave request was reported in HIP in December, the employee forfeited 14 hours.



Balance as of 11/30:	720 hours
Plus, expected Vacation accrual for December:	+ 14.00 hours
Minus 720 Hour Forfeiture for end of year:	- 14.00 hours
<u>Total Expected Vacation Balance as of January 1, 2023:</u>	= <u>720.00</u> <u>hours</u>
Plus, expected Vacation accrual for January:	+ 14.00 hours
<u>Total Expected Vacation Balance as of February 1, 2023:</u>	= <u>734.00</u> <u>hours</u>

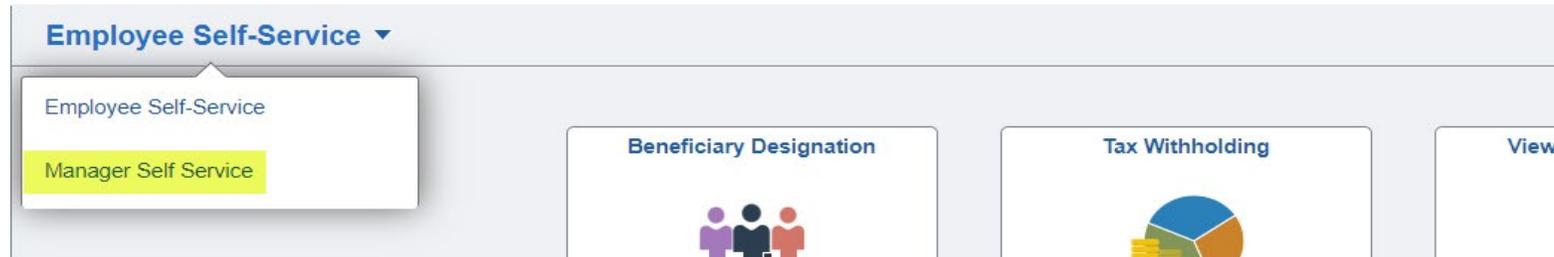
Timing Example Continued

- When the employee goes back to enter the December request, the leave balances and forecast results updates accordingly. Note that entering the December request resulted in no year-end forfeit and recalculated the January starting balance.

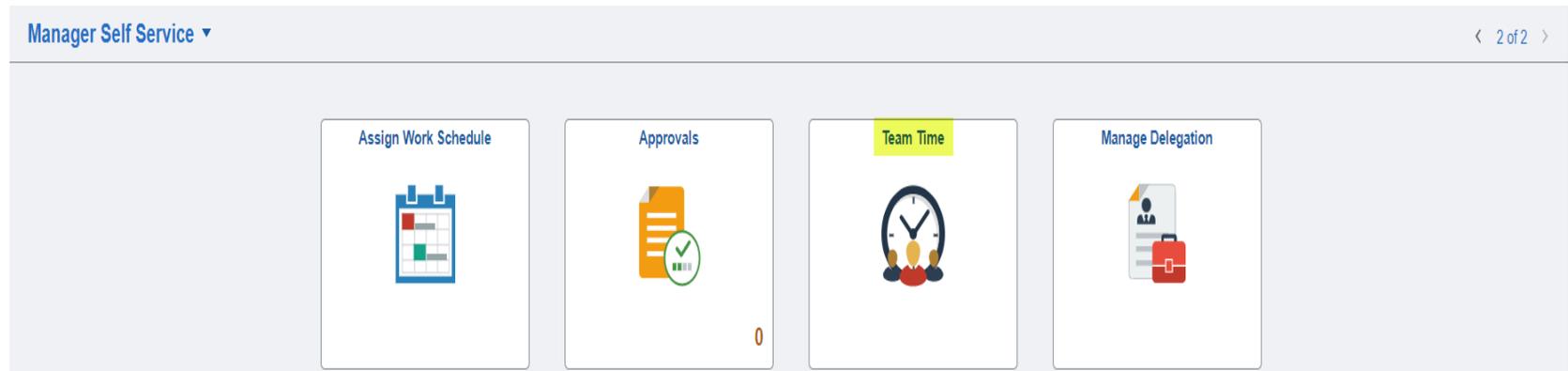


Forecasting Navigation – Supervisor Section

- Log on to HIP and navigate to the Manager Self-Service (MSS) menu:



- Navigate to the Team Time Tile:



Supervisor Finding Today's Balance for an Employee

- Navigate to the Absence Balances feature on the left side menu. A list of your direct reports will appear.

The screenshot shows the Manager Self Service interface. The left sidebar menu includes options like Timesheet, Report Time, Weekly Time Entry, Weekly Time Summary, Payable Time, Comp Time, Request Absence, Cancel Absences, View Requests, Absence Balances (highlighted), Manage Exceptions, and Workforce Availability. The main content area is titled 'Absence Balances' and includes a 'Search Options' section and a 'Select Employee' section. Below this is a table with the following data:

Name / Title / ID - Record	Directs / Total	Status / Type
*General Professional	1/1	Active Employee
*General Professional	1/1	Active Employee
*General Professional		Active Employee
*General Professional	2/2	Active Employee

- Hint: If you have supervisors under you, you may also view Absence Balances for the people that report to the supervisors by “drilling down” on the Directs / Total icon to see more employees.

Supervisor Finding Today's Balance for an Employee Continued

- Click on one of your employees to retrieve their data and run a forecast, by expanding the Forecast Balance drop down menu.
- This employee has 160.00 Hours as of 11/15/2022.

The screenshot displays the 'Manager Self Service' interface. On the left is a navigation menu with options: Timesheet, Report Time, Weekly Time Entry, Weekly Time Summary, Payable Time, Comp Time, Request Absence, Cancel Absences, View Requests, Absence Balances (highlighted), and Manage Exceptions. The main content area is titled 'Team Time' and shows 'Absence Balances' for a 'General Professional' employee. A table lists the following balances as of 11/15/2022:

Vacation Leave Receive Ent As Of 11/15/2022	0.00 Hours
Sick Earn as you go Balance As Of 11/15/2022	0.00 Hours
Vacation Balance As Of 11/15/2022	160.00 Hours
Sick Balance As Of 11/15/2022	396.00 Hours

Below the table is a disclaimer: '**Disclaimer: The current balance does not reflect absences that have not been processed.' A 'Forecast Balance' section is partially visible at the bottom.

Supervisor Finding Today's Balance for an Employee Continued

- Today is 12/22/2022, to know what the vacation balance was as of today 12/22/2022, input that date in the As of Date field and enter 02 – Vacation in the Absence Name field, then press Forecast Balance. Notice the hours are now 174, which is including the 14-hour that will accrue for the month of December.

Forecast Balance

As of Date 

Filter by Type 

*Absence Name  Current Balance 174.00 Hours**

[View Forecast Details](#)

Forecast Details		X
Vacation Balance	174.00	
01/01/2022 - 12/31/2022		
Vacation Entitlement Adj YTD	0.00	
01/01/2022 - 12/31/2022		

Supervisor Finding a Future Balance for an Employee

- Today is 12/22/2022, and you want to forecast what your employee's vacation balance will be on 2/1/2023. Follow the same steps above, but when inputting the As of Date change it to 2/1/2023 and press Forecast Balance. Employee now shows 202.00 hours.

Forecast Balance

As of Date 

Filter by Type ▼

*Absence Name ▼ Current Balance 160.00 Hours**

[View Forecast Details](#)

Forecast Details

x

Vacation Balance	202.00
01/01/2023 - 12/31/2023	
Vacation Entitlement Adj YTD	0.00
01/01/2023 - 12/31/2023	
Vacation Entitlement YTD	14.00
01/01/2023 - 12/31/2023	

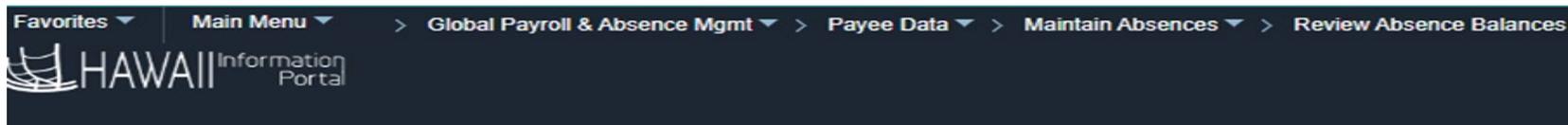
Supervisor Finding a Future Balance for an Employee Continued

- The employee's vacation balance as of February 1, 2023, is 202 hours, considering that the employee had an original vacation balance of 160 hours as of 11/15/2022.

Balance as of 11/15:	160.00 hours
Plus, expected Vacation accrual for November:	+ 14.00 hours
Plus, expected Vacation accrual for December:	+ 14.00 hours
Plus, expected Vacation accrual for January:	+ 14.00 hours
Total Expected Vacation Balance as of February 1, 2023	= 202.00 hours

HR Admin/Leave Keeper forecasting for an Employee

- Path: Main Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Review Absence Balances. Enter the Empl ID that you want to forecast and select Search.



Review Absence Balances

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Empl ID	begins with	00123456
Empl Record	=	
Name	begins with	
Last Name	begins with	
Second Last Name	begins with	
Alternate Character Name	begins with	
Middle Name	begins with	

Case Sensitive

Search

Clear

Basic Search  Save Search Criteria

01/23/2023

HR Admin/Leave Keeper forecasting for an Employee Continued

- Current Balance information will come up as you can see this employee's Vacation balance is 160.00, go to the Forecast Balance tab.

The screenshot displays the 'HAWAII Information Portal' interface. The breadcrumb trail is: Favorites > Main Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Review Absence Balances. Below the breadcrumb, there are three tabs: 'Current Balance', 'Forecast Balance' (highlighted in yellow), and 'Forecast Messages'. The employee information section shows 'Employee ID' [redacted], 'Empl Record' 0, and 'Name' [redacted]. The main section is titled 'Absence Entitlement Current Balance' and includes a search icon, a list icon, and a dropdown menu showing '1-10 of 14' with a 'View All' link. Below this, there are two sub-tabs: 'Accumulator Balance' (highlighted in blue) and 'User Keys'. The main data is presented in a table with the following structure:

Accumulator Period	Entitlement Element	Element Name	Amount	From	Through
Year to Date	HI SICK AE	HI SICKAE_BAL	396.000000	01/01/2022	12/31/2022
Year to Date	HI VAC ENT	HI VAC ENT_BAL	160.000000	01/01/2022	12/31/2022

HR Admin/Leave Keeper forecasting for an Employee Continued

- In the Absence Take Element Select HI VAC AT and the As of Date you want to forecast and select Forecast, a forecasting prompt message will pop up go ahead and hit OK.

Forecasting completed covering the period from 2022-11-16 to 2023-02-01 (17005,479)

Employee ID Empl Record 0 Name
Absence Take Element
As Of Date

In this example we used 2/1/23 and you see the Vacation balance now at 202.00 hours. Note: You can verify vacation requests via the Create and Maintain Absences screen: [HIP | Using the Create and Maintain Absence Requests Screen](#)

Forecast Balance Results Detail

1-8 of 8 | View All

Secondary Element	Forecast Element	Type	Numeric Value	Character Value	Date Value
HI VAC AT	HI VAC ENT _BAL	Accumulatr	202.000000		
HI VAC AT	HI VAC ENT _ADJ	Accumulatr	0.000000		
HI VAC AT	HI VAC ENT _ENT	Accumulatr	14.000000		

Helpful Tips

- Note: Sick & vacation entitlements for employees on Workers' Comp leave may require manual adjustment by an HR office to credit an employee with their full amount of paid leave owed.
- [Hawaii Information Portal | Using The Create And Maintain Absence Requests Screen](#)
- [Hawaii Information Portal | How To Submit A Leave Request](#)
- [Hawaii Information Portal | How To Request Leave For Your Employees](#)
- [Hawaii Information Portal | How To Review Employee Leave Balances](#)
- [Hawaii Information Portal | Forecasting Guide](#)



MAHALO FOR YOUR TIME!