Electronic Leave Requests

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THE UNIVERSITY OF TEXAS AT EL PASO
Agenda

- Timesheet Overview
- Roles and Responsibilities
- Absence Request Submissions
- Approving Requests
- Warning Messages vs Hard Stops
- Cancelling Requests
- Tips and Reminders
Timesheet Overview

What’s new?

• UTEP employees can now submit leave requests in PeopleSoft for:
  ✓ Vacation leave
  ✓ Sick Leave
  ✓ Jury Duty
  ✓ Educational Activities
  ✓ Bereavement

• Leave requests submitted by Employees and by Timekeepers will route to the employee’s “Reports To” Manager.
Timesheet Overview

How does it work?

Employee Submits

or

Timekeeper submits on behalf of the Employee

Reports To Approval *

Update PeopleSoft

* If the Reports To position is vacant, request will route to the next level supervisor.
### Roles and Responsibilities

<table>
<thead>
<tr>
<th>Employee</th>
<th>Timekeeper</th>
<th>Reports To</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Submit leave requests</td>
<td>• Submit leave request</td>
<td>• Review leave requests</td>
</tr>
<tr>
<td>• Cancel leave requests</td>
<td>• Add comp time</td>
<td>▪ Approve</td>
</tr>
<tr>
<td></td>
<td>• Submit leave utilizing comp time</td>
<td>▪ Deny</td>
</tr>
<tr>
<td></td>
<td>• Submit timesheets</td>
<td>▪ Pushback</td>
</tr>
</tbody>
</table>

- Submit leave requests
- Cancel leave requests
- Submit leave request
- Add comp time
- Submit leave utilizing comp time
- Submit timesheets
- Review leave requests
  - Approve
  - Deny
  - Pushback
Timesheet Policies and Procedures

By when should time be submitted?

- Users have a 90 day pay window from the absence event to enter or make any adjustments.
- Adjustments after 90 days of an event will need to be reported to Absence Management; send requests to payroll@utep.edu.

Attachments?

- Employees can attach documentation such as doctor’s notes, jury duty summons and school documents.
- Timekeepers do not have access to attach documentation.
FMLA/Comp Time

How will this affect FMLA time reporting?

• FMLA or Extended Leave Requests will continue to be submitted and processed by the Benefits Office.

Who will be responsible for entering/reporting time Comp time?

• Timekeepers will continue to be responsible for entering/reporting Comp time for employees.
• Timekeepers will also be responsible for submitting leave requests on behalf of the employee if the employee would like to use Comp time (Straight Time or Overtime).
Leave Request Submissions
Employee Submissions/Cancellations

Things to Know:

• Employees can submit/cancel/view leave requests via the Time and Attendance tile on the Employee Self Service home page.

Leave Types:

<table>
<thead>
<tr>
<th>Leave Type</th>
<th>When to use?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sick Leave</td>
<td>Sick time, doctor's visit for self, spouse, children under 18, &amp; parents</td>
</tr>
<tr>
<td>Vacation Leave</td>
<td>Personal time off</td>
</tr>
<tr>
<td>Jury Duty</td>
<td>Jury summons, should include documentation provided by court</td>
</tr>
<tr>
<td>Educational Activities</td>
<td>Field trip, parent-teacher conference, applicable to children in K-12</td>
</tr>
<tr>
<td>Bereavement</td>
<td>Funeral for direct family member</td>
</tr>
</tbody>
</table>

For more information visit: [https://www.utep.edu/human-resources/services/benefits/leave-programs/index.html](https://www.utep.edu/human-resources/services/benefits/leave-programs/index.html)
Absence Balances

Keep in Mind:

- Balances are updated twice per month. Generally on the 2nd and 16th.

Where to view balances:

Timesheet:

<table>
<thead>
<tr>
<th>Entitlement Name</th>
<th>Balance as of 6/4/19/2020**</th>
<th>From</th>
<th>To</th>
<th>Accrual Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sick Leave</td>
<td>472.00 Hours</td>
<td>09/01/2019</td>
<td>08/31/2020</td>
<td>Year to Date</td>
</tr>
<tr>
<td>Vacation Leave</td>
<td>227.00 Hours</td>
<td>09/01/2019</td>
<td>08/31/2020</td>
<td>Year to Date</td>
</tr>
</tbody>
</table>

**Disclaimer: The current balance does not reflect absences that have not been processed.
Employee Submissions/Cancellations

Workflow:

1. Employee Submits
2. Reports To Approval
3. Update PeopleSoft
1. Log into PeopleSoft, from the Employee Self Service homepage select the Time and Attendance tile.
2. Next, select the Request Absence tile.
Employee Leave Request Submission

3. From the drop-down menu, select the Absence Name.
4. Insert the Start and End Date.
5. Under Duration enter the number of hours.
6. Then, click on Partial Days:
   a) If this is to submit time for a full day (8hrs), select None. If this is to submit time for a Partial day (i.e. 4hrs) select All Days and re-enter the Duration.
   b) Select Done.
7. Enter Comments.
8. Add Attachments if necessary.
9. Click Submit.
Employee Leave Request Submission

- The status will update and show **Submitted** and will route to the employee’s Reports to for approval.

- Absence Name: Vacation Leave
- Start Date: 02/11/2020
- End Date: 02/11/2020
- Duration: 8.00 Hours

**Attachments**
You have not added any Attachments.

**Balance Information**
As Of 06/15/2020 94.00
Timekeeper Submissions

Things to Know:

• Timekeepers should only submit leave requests for employees if required by the department.
• Hourly timesheets will still be submitted by Timekeepers.
• Cancellations can only be requested by the employee.
• Other timesheet policies & procedures will remain the same.
Timekeeper Submissions

Workflow:

1. Timekeeper submits on behalf of the Employee
2. Reports To Approval
3. Update PeopleSoft
Approving Requests

Things to Know:

• There are two approval methods when reviewing leave requests:
  • “E-mail” Method*:
    ▪ Document is sent to UTEP email address.
    ▪ Click hyperlink at bottom of email to open the document.
    ▪ Log into PeopleSoft to review document information.
  • HRMS Tile:
    ▪ Log into PeopleSoft, from the Employee Self Service homepage select the HRMS Tile.
    ▪ Under Pending Approvals, select the request to review/approve.

*There is an Absence Request awaiting your approval
Employee Id: 6001111111-Adrian Rodriguez
Department: PeopleSoft
Job Title: Project Specialist
Absence Start Date: 2020-03-04
Absence Name: 250060 - AT VAC - Vacation Leave
Absence End Date: 2020-03-04
Status: Submitted
Comments: testing outlook emails
Please use the following link to view the transaction:
Action:U&TRANSACTION NBR=088667&EMPLID=6001517351&EMPL RCD=0&SIGN DT=2020-03-04
Approving Requests Overview

Things to Know:

- Transactions submitted by Timekeepers will be classified as “Reported Time.”
- Transactions submitted by Employees will be classified as “Absence Request.”
- When approving the layout/options will be slightly different; however, the overall design is the same.

- Managers can also review their employee’s time and further details on the Manager Self Service home page under the Team Time and Attendance tile under.
Manager Reviewing Requests

1. Log into PeopleSoft, from the Employee Self Service homepage select the HRMS Approvals tile.
Manager Approving Employee Submissions

2. Under Pending Approvals, select an Absence Request (each row contains: employee name, absence type, start and end date).
Manager Approving Employee Submissions

The page displayed will show full details about the leave request submitted by the employee.

3. The page displayed will show:
   3a. **Absence Details**
   3b. **Leave Balance**
   3c. **Attachments**, if applicable.

4. Select: **Approve** to approve the request, select **Pushback** to send back the request, or select **Deny** to terminate the request. Please note, comments are required when pushing back or denying transactions.

5. Click the **Submit** button to complete the process.
### Manager Approving Timekeeper Submissions

After selecting **HRMS Approvals** tile from Employees Self Service home page:

1. Under Pending Approvals, select an **Reported Time** (each row contains: employee name, absence type, start and end date).
Manager Approving Timekeeper Submissions

The page displayed will show full details about the time submitted by the Timekeeper. If there are multiple lines pending review, select the lines and chose and action: select Approve to approve the request or select Deny to terminate the request.

2. Review the date and time entered and use the check box to select the lines.

3. Select: Approve to approve the request, select Pushback to send back the request, or select Deny to terminate the request. Please note, comments are required when denying transactions.

4. Click the Submit button to complete the process.

If you still need to approve/deny other lines the page will refresh and you will see the outstanding lines, follow steps 2-4 once again.

<table>
<thead>
<tr>
<th>Report Date</th>
<th>Time Reporting Code</th>
<th>Quantity for Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/16/2020</td>
<td>VACS - Vacation - Salaried</td>
<td>8.00 Hours</td>
</tr>
<tr>
<td>04/17/2020</td>
<td>VACS - Vacation - Salaried</td>
<td>8.00 Hours</td>
</tr>
</tbody>
</table>
Cancelling Requests

Things to Know:

• Employees can submit a cancellation for requests pending approval and for approved transactions.
• Cancellation requests will route to the Manager for approval.
• Managers & Timekeepers currently do not have the ability to cancel requests.
• If cancellations cannot be completed by the employee please contact payroll@utep.edu.
Warning Messages vs Hard Stops

**Warning Messages**

- **Warning - 5**
  Hours entered on Holiday <Holiday Date> with <Entered TRC>.
- **Warning - 11**
  Hours entered more than 40 in a week.

**Hard Stops**

- **Error – 3**
  Straight Comp Hours cannot Accommodate. Please correct.
- **Error – 4**
  Overtime Comp Hours cannot Accommodate. Please correct.
Tips & Reminders

• If a Reports To manager is out on extended leave and unavailable to approve leave requests, please submit a helpdesk and we can re-route the leave request.

• Submit a Help Desk ticket to helpdesk@utep.edu for any technical issues related to leave request submissions.

• For general questions on processing leave, contact the Payroll Office at payroll@utep.edu
Questions?
THANK YOU!