

How to

Manage Leave for all Employee, and Manage Time-Off for Non-ESS Users

**USER
ROLE**



All Employees

**STARTING
POINT**



Absence Worklet

Overview

This module provides instructions on how to manage leave and time off for different groups of employees. It provides information on:

- › Chapter 1: Manage Leave for all Employees
- › Chapter 2: Manage Time-Off for Non-ESS Users

Key Terms

Absence Worklet: a worklet linking you to common actions and views related to your absences, including:

- › Request absence
- › Correct my absence
- › Request return from leave of absence
- › View absence / absence balance

Time Off: A short period of time that is not worked, but the return date is known. E.g., sick leave, jury duty, or vacation. Requesting time off does not affect a worker's status in Workday.

Leave of Absence: An extended period of time that is not worked, while maintaining an active employee record. E.g., long term disability, maternity leave, or parental leave. Return date is estimated and when the employee returns to work, a request return from leave of absence must be processed. Requesting leave of absence affects a worker's status in Workday.

Schedulable: An employee that is in Workday and whose schedule is available within ESS.



Non-schedulable and Schedulable employees will manage their **leaves in Workday**. Leave management applies for all employees.



Time off will be managed differently for Non-schedulable and Schedulable employees.

- **Non-schedulable employees** will manage their **time off in Workday**.
- **Schedulable employees** will continue to manage their **time off in ESS**.



All instructions in this job aid start from the **Absence Worklet**. From your Workday homepage, navigate to the Applications and then click on the **Absence worklet**.



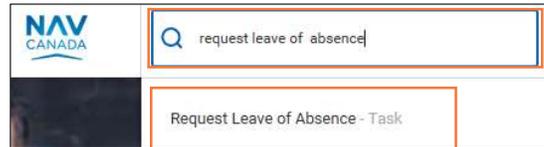
Workday makes it easy for you to request and manage time off or an absence within the system. Once submitted, all requests are routed to your manager for approval. You can request for two types of absence:

- Time Off Requests
- Leave of Absence Requests

Chapter 1: Manage Leave for all Employees

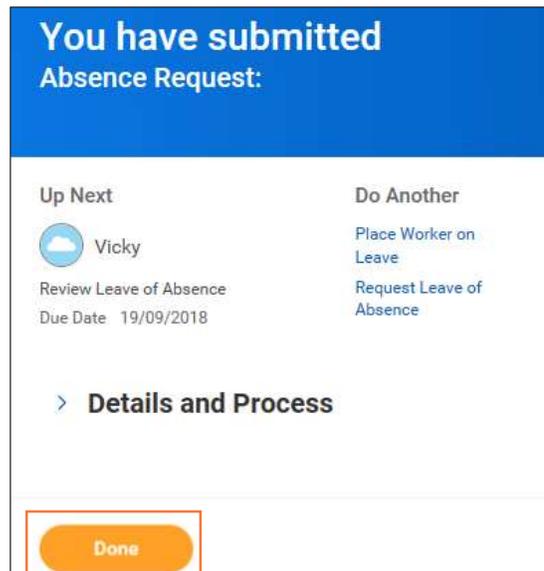
How to Request Leave of Absence

- › From the Workday home page, type **Request Leave of Absence** in the **Search** field.
- › Select the **Request Leave of Absence** task from the **Search Results** to start the process.



- › Select appropriate dates in the **Last Day of Work**, **First Day of Absence** and **Estimated Last Day of Absence** fields.
- › Enter type of absence in the **Type** field.
- › Click **Submit**.

- › Your request has been successfully submitted to your manager for approval.
- › Click **Done**.



How to View your Absence Balance

- > At the bottom of the page, you can view **Available Balance as of Today**.
- > For more details, click on the **My Absence** button to view **Absence Requests**.

- > Here you can view the details of your absence requests.
- > Click **Absence Balances as of Current Date** to view a detailed view of your Absence Plan.

Date	Day of the Week	Type	Requested	Unit of Time	Status	View More
13/07/2018	Friday	Vacation	8	Hours	Submitted	Q
12/07/2018	Thursday	Vacation	8	Hours	Submitted	Q

- > Here you can view a detailed view of your Absence Plan.

My Absence
Jona Kaminski (Actions)

Organization: President CEO → Training and Maintenance Services
Manager(s): Warren

Absence Requests: **Absence Balances as of Current Date**

Balances Tracked in Hours: 2 items

Absence Plan	Unit of Time	Beginning Year Balance	Accrued Year To Date	Absence Paid Year To Date	Beginning Period Balance	Accrued in Period
Vacation	Hours	0	200	0	120	0
Vacation Purchase Plan	Hours	0	0	0	0	0

- > You can also return to the previous page to view your **Absence Balance** as of a specified date.

Absence

Request

- Request Absence
- Correct My Absence
- Request Return from Leave of Absence

View

- My Absence
- Absence Balance**

- > Enter an effective date in the **As Of** field.
- > Click **OK**.

Absence Balance

As Of * 14 / 09 / 2018

OK Cancel

> You can view the absence balance sheet information, including:

Balance As Of Date 01/05/2020

Values displayed are based on the Balance As Of Date entered. To view details drill down on Year to Date values.

Balances Tracked in Hours 6 items

Absence Plan	Unit of Time	Beginning Year Balance	Carryover Balance	Accrued Year To Date	Absence Paid Year To Date
Compensatory Plan	Hours	0		0	0
Compensatory Special Plan	Hours	0		0	0
Compensatory Time Off Plan	Hours	0		0	0
Lieu Days Plan	Hours	88	88	88	0
Sick Leave Plan	Hours	926.88		10	0
Vacation	Hours	80	80	200	0

Absence Plan: This column lists all accrual plans you are eligible for. Plans will be listed even when the balance is 0 hrs.

Beginning Year Balance: Represents hours carried over from the previous leave year.

Carryover Balance: Will be visible only if you have carryover hours that expire or if you submit a carryover request at leave year end. This column will equal the **Beginning Year Balance** column.

Accrued Year to Date: Total hours accrued in the current leave year. Does not include hours carried over.

Absence Paid Year to Date: Total hours used or paid out in the current leave year.



The above columns are total amounts based on the current leave year.



At go-live, all columns above will show 0 hrs unless you have a carryover that expires in which case, the Beginning Year Balance and Carryover Balance columns will be populated.

Beginning Period Balance	Accrued in Period	Absence Paid in Period	Carryover Forfeited in Period	Ending Period Balance	Ending Period Balance Including Pending Events	As of Period
0	0	0	0	0	0	29-Apr-2020 - 5-May-2020 (Weekly (Absence))
0	0	0	0	0	0	29-Apr-2020 - 5-May-2020 (Weekly (Absence))
0	0	0	0	0	0	29-Apr-2020 - 5-May-2020 (Weekly (Absence))
176	0	0	0	176	176	1-May-2020 - 31-May-2020 (Monthly (Absence))
936.88	0	0	0	936.88	936.88	1-May-2020 - 31-May-2020 (Monthly (Absence))
280	0	0	0	280	280	1-May-2020 - 31-May-2020 (Monthly (Absence))
				Total:	1392.88	1392.88

Beginning Period Balance: Total hours available for use at the start of the current period. This amount will match the **Ending Period Balance Including Pending Events** column from the previous period.

Accrued in Period: Total hours accrued from the start of the current period up to and including the effective date entered.

- E.g. Vacation and Lieu Days accruals occur at the start of the leave year. For a unionized employee, this accrual will show in the period of Apr 1st to Apr 30th. For a management employee, this accrual will show in the period of Sep 1st to Sep 30th. All periods going forward, this column will show 0 hrs.
- E.g. Sick accrual of 9.375 hrs per month. Effective the last day of each month, this column will show 9.375 hrs.

Absence Paid in Period: Any hours used or paid out between the start of the current period and the effective date entered.

Carryover Forfeited in Period: Represents hours that cannot be carried over and will be paid out (for unionized employee's).

Ending Period Balance: Balance after taking into account all time carried over, accrued, used, and paid up to the effective date entered. This column does not include pending requests and future dated requests.

Ending Period Balance Including Pending Events: Balance after taking into account all time carried over, accrued, used, and paid up to the effective date entered. This column also includes pending requests as of the effective date and prior.

As of Period: The applicable weekly or monthly period of the effective date entered. This screen is showing amounts based on the start of the period up to and including the effective date.

- **Weekly Periods:** Used for all compensatory plans. Weekly periods start as of Apr 1st each leave year.
- **Monthly Periods:** Used for all other accrual plans



At go-live, all columns will show 0 hrs except the Beginning Period Balance, Ending Period Balance, and Ending Period Balance Including Pending Events columns. The hours in these 3 columns will reflect the balance converted from Oracle.

How to Request a Return from Leave of Absence

- › Click on the **Request Return from Leave of Absence** to request a return to work.

Request

Request Absence

Correct My Absence

Request Return from Leave of Absence

- › Within the **Request Return from Leave of Absence**, select your return to work date.
- › Use **Drop files here** or **Select files** to attach any supporting documents.
- › Click **Submit**.



Your return from leave of absence request has been sent for approval. You will receive a notification within your Workday Inbox once it is approved.

Request Return from Leave of Absence (On Leave) (Actions)

First Day Back at Work

Absences Returned From 1 item ☰ ☰ ☰

Select	*Event	First Day of Absence	Estimated Last Day of Absence	Actual Last Day of Absence
<input checked="" type="checkbox"/>	Other LWOP (25-Aug-2018)	25/08/2018	30/08/2018	<input type="text"/>

› **Supporting Documents**

enter your comment

Drop files here

or

Select files

Submit

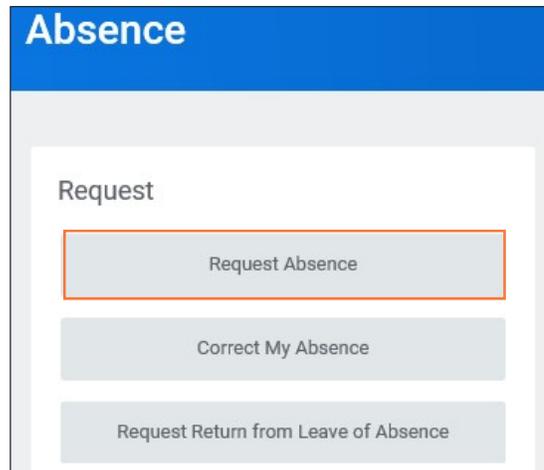
Save for Later

Cancel

Chapter 2: Manage Time-Off for Non-ESS Users

How to Request Time-Off

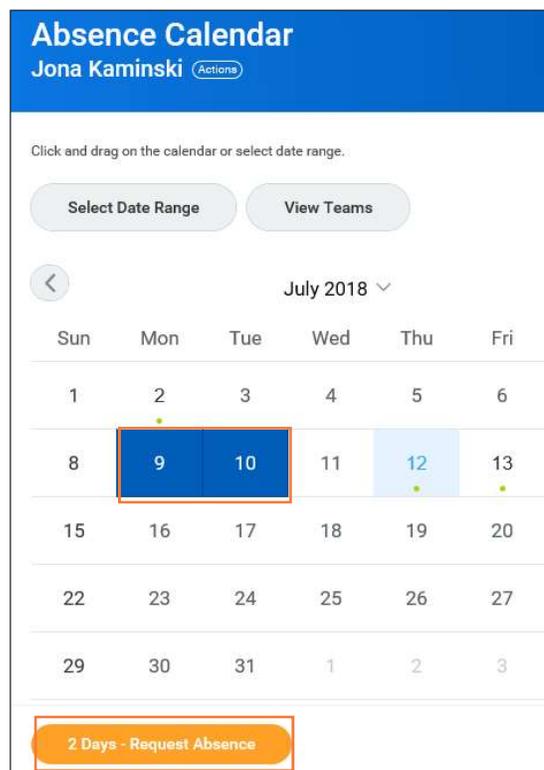
- › Click **Request Absence** to open the absence calendar.



- › Click on the day(s) you wish to be absent, or click and drag to select multiple days.

! **Did you know?** You can also select an extended date range by clicking on the **Select Date Range** button then enter an extended date range. This is useful when entering an absence request that might extend into a different month or over a longer time period.

- › Click the **Request Absence** button.



- › Select your **Absence Type** in the pop-up window. You can select:
 - **LWOP absence:** an unpaid leave of absence e.g. sick leave, paternity leave
 - **DISP absence:** a leave for a Disability Income Security Program
 - **Other Absence Types:** a paid leave e.g. bereavement, vacation, vacation carryover, payouts



The number of days you requested automatically displays on the button to help confirm your request. This is where you will be able to select the **Type of Absence** requested.

- › Click **Next** to display the **Request Absence** page listing the requested time off.

Select Absence Type

When Monday, July 9, 2018 - Tuesday, July 10, 2018

Type *

- Compensatory >
- DISP >
- LWOP >
- Sick >
- Vacation and Lieu >
- Other Absence Types >

Next
Cancel

- › Now that you have entered the number of days, you must enter the number of hours for each day. Click **Edit Quantity per Day**.



You need to enter the number of hours you are absent per day. The total number varies per your role.

Request Absence

Jona Kaminski (Actions)

Total 0 hours - DISP (100%) (Intermittent)

Request 1 item

	Quantity per Day	Total	
P (100%) (Intermittent) ⋮	0 hours	0 hours	Edit Quantity per Day

- > Enter the number of hours for each day or use the **Update All Quantities** field to update all fields.
- > Click **Done** to confirm your entries.

16 hours - DISP (100%) (Intermittent) Total

Update All Quantities 8

2 items

Date	Quantity per Day	Comments
Mon, Jul 9, 2018	8	
Tue, Jul 10, 2018	8	

Done Cancel

- > Depending on your absence type, you may need to upload supporting documents. Use **Drop files here** or **Select files** to attach the documents.
- > Click **Submit**.

Your absence request has been sent for approval. You will receive a notification within your Workday Inbox once it is approved.

You can also click on the event on your calendar, click on the absence event, and click on the Process tab. This allows you to see who your request is awaiting action with.

Attachments

Drop files here

or

Select files

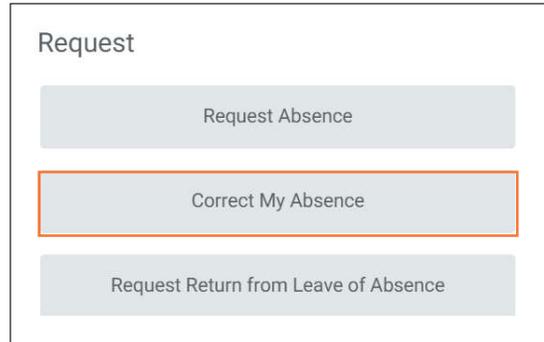
Submit Cancel

How to Request a Time Off Correction

- > Under **Request**, click **Correct My Absence**.



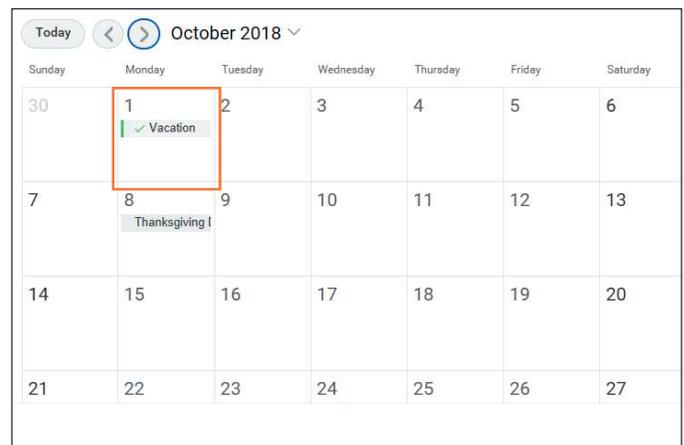
You can correct Time Off requests but not Leave of Absence requests.



- > You will be redirected to the **Absence Calendar**.
- > Within the **Absence Calendar**, double click the absence you wish to correct to display the Details window.



If the absence has not been approved, you can click **Cancel this Request** then re-enter your request.



- > If the request was approved, the **Correct Absence** screen displays. You can correct the type of absence and / or quantity of hours for an absence.
- > Within the details, enter a reason for the change within the comment box.
- > Click **Submit**. Your request is now submitted for approval by your Manager.
- > Click **Done**.



You can also update your time entry using your mobile device. Refer to Using Workday for Mobile for details on how to download and navigate the application.

Correct Absence (On Leave) Actions ?

Total
8 Hours

Monday, October 1, 2018

Select All 1 selected

Correct 1 item [Grid Icon]

-	<input checked="" type="checkbox"/>	Monday, October 1, 2018	Vacation	8 Hours
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Type * X Vacation ⋮

Quantity per Day

Unit of Time Hours

Comment

> **Details**

enter your comment

Attachments

Drop files here

or

Select files

Submit

Cancel