

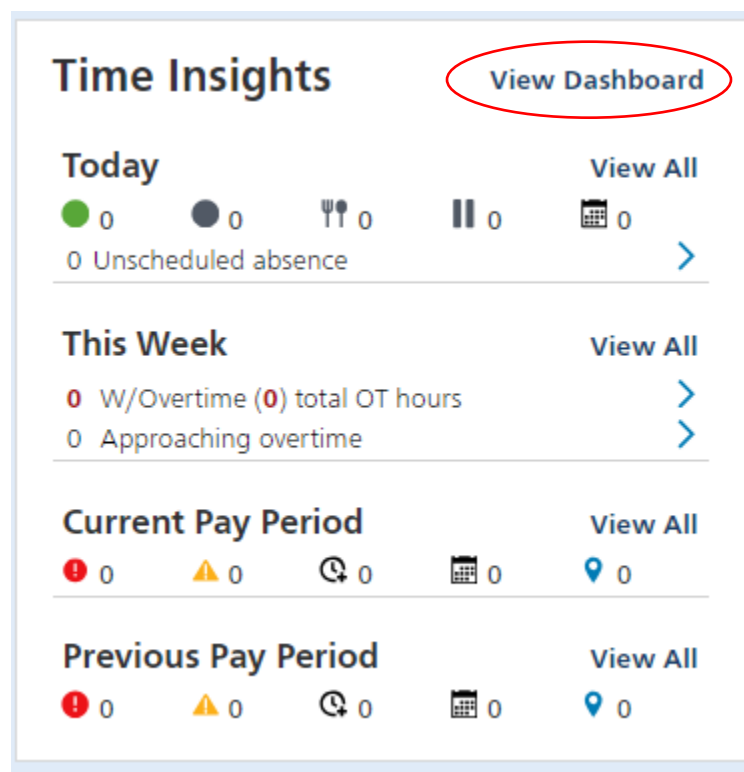
# Time off Manager: Supervisor Guide

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## OVERVIEW

- In the **Time Off Manager**, employees can submit requests for time off to their manager for approval.
- To access the Time Off Manager:
  - Option 1) On the Homepage go to “**Time Insights**” > “**View Dashboard**”



The “**Time Dashboard**” will assist with Time Off Approval and Time Card Approval

### Under Custom Filters

You can change the filters at the top to the correct Paygroup.

You can change the Employee Types to All Employees, Employees w/ Clock Access, or Employees w/ Time Card Activity.

### Time Dashboard

Print

Custom Filters

Paygroups : Faculty & Admin - Monthly

Departments (0)

Managers (0)

Employee Types

✓ Save Filters

Paygroups

☒ Faculty & Admin - Monthly

☐ Staff - Bi-weekly

☐ Students Bi-weekly

Cancel

Apply

### Time Dashboard

Print

Custom Filters

Paygroups : Faculty & Admin - Monthly

Departments (0)

Managers (0)

Employee Types (1)

✓ Save Filters

☐ TODAY

☐ WEEKLY

☒ PAY PERIOD

Previous Pay Period

Current Pay Period

Pay Period: 01/01/2024 - 01/31/2024

Last Updated: 9:55 AM 02/20/2024

Exceptions

Restricted Punches

Time Off Requests

Export Hours

Export Attestation

0 Total Time Cards

0 w/ Critical Exceptions

0 w/ Non-Critical Exceptions

0 w/ Missed Punch Requests

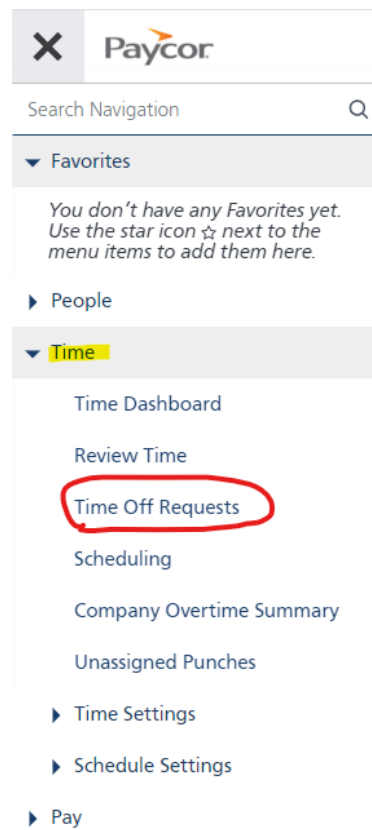
0 w/ Time Off Requests

0 w/ Punch Location Restriction

Employee Name	#	Reg	OT	Total	Scheduled Hours	Outstanding Items	Restrictions	Approvals	Actions
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There is no data available for the selected filters.

- Option 2) Navigate to **"Time"** > **"Time Off Requests"** on the Main Menu



## Time Off Requests

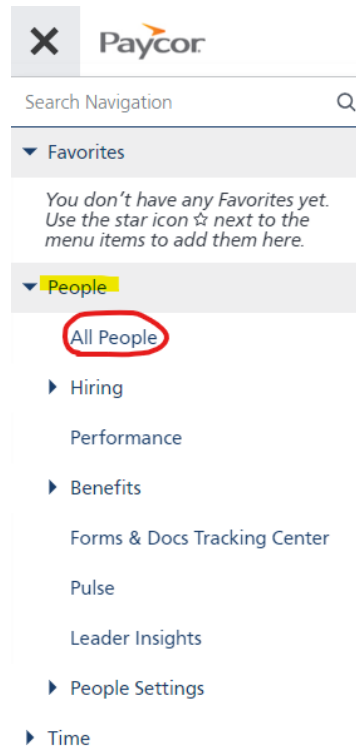
Search Employees...

Q

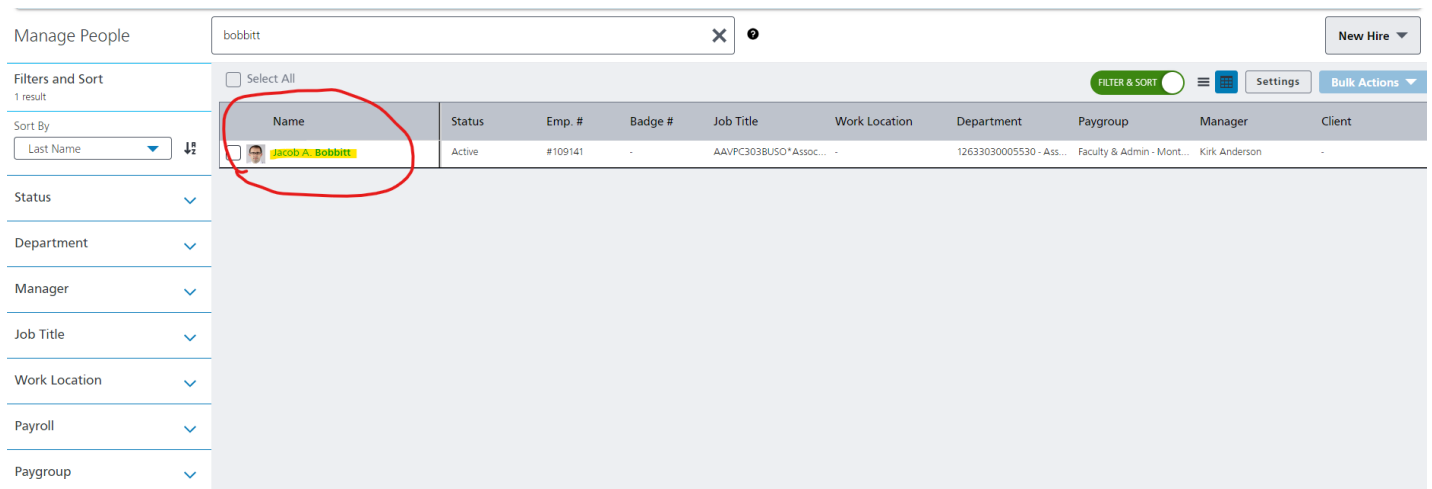
Record Absence

Date(s) Requested	Employee	Manager	Department	Paygroup	Time Off Type	Date Submitted	Hours Available	Hours Requested	Status	Tenure	Action
There are no time off requests for the current filter.											

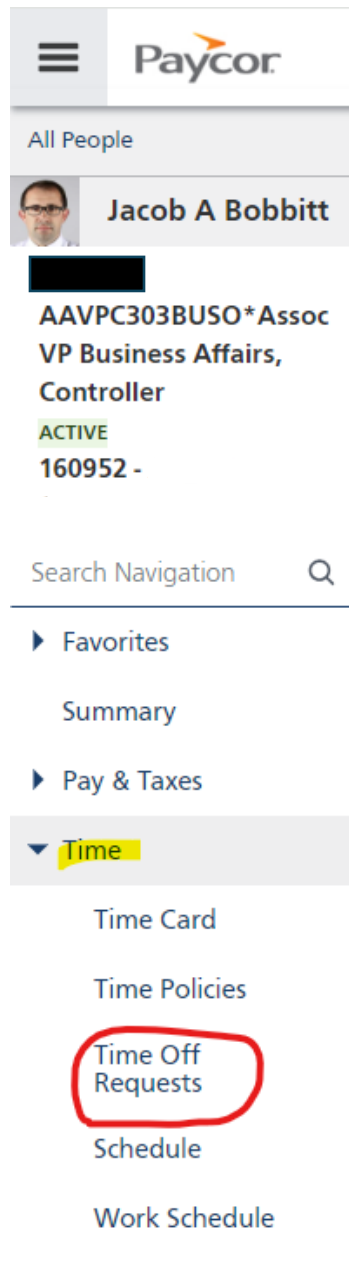
- Option 3) Navigate to **People > All People..**



Open an **Employee's Profile** by clicking the **Employee Name**.




## Select Time > Time Off Requests



The image shows a mobile application interface for Paycor. At the top, there is a header with a hamburger menu icon and the Paycor logo. Below the header, there is a section for 'All People' with a profile card for Jacob A Bobbitt. The profile card includes a photo, name, ID number (AAVPC303BUSO\*), title (Assoc VP Business Affairs, Controller), status (ACTIVE), and a phone number (160952 -). Below the profile card is a 'Search Navigation' bar with a magnifying glass icon. Underneath the search bar is a list of navigation options: 'Favorites', 'Summary', 'Pay & Taxes', 'Time', 'Time Card', 'Time Policies', 'Time Off Requests', 'Schedule', and 'Work Schedule'. The 'Time' option is highlighted with a yellow background, and 'Time Off Requests' is circled in red.

Paycor

All People

 **Jacob A Bobbitt**

AAVPC303BUSO\*Assoc  
VP Business Affairs,  
Controller

ACTIVE

160952 -

Search Navigation

► Favorites

Summary

► Pay & Taxes

▼ Time

Time Card

Time Policies

Time Off Requests

Schedule

Work Schedule

## MANAGING TIME OFF

- All employee requests are available in **Time > Time Off Requests**. To manage requests for employees, you must be assigned as their direct manager with the **Manager** role. **(IF YOU DO NOT SEE ONE OF YOUR EMPLOYEES THEN PLEASE REACH OUT TO PAYROLL OR HUMAN RESOURCES)**
- **Time Off Requests** should look like the screenshot below:

Paycor

Viewing: 123456 - Connelly Bookstore

### Time Off Requests

Requests

Calendar

Search by Employee Name and Number

Bulk Actions

Record Absence

<input type="checkbox"/>	Date(s) Requested	Employee	Department	Paygroup	Time Off Type	Date Submitted	Hours Available	Hours Requested	Status	Tenure	Action
<input type="checkbox"/>	12/12/22 - 12/17/22	Michelle Patterson 12345	Accounting	Weekly	Paid Time Off	12/10/22 06:10 AM	40	40	Pending Recommend Approve	13 yr, 8 mo	
<input type="checkbox"/>	11/02/22 - 11/04/22	Michael Banks 12345	Collections	Bi-Weekly	Paid Time Off	12/10/22 07:24 AM	40	5 12:00 PM – 5:00 PM	✓ Approved	3 yr, 1 mo	
<input type="checkbox"/>	10/17/22 - 10/19/22	Morgan Ash 12345	HR	Weekly	Paid Time Off	12/10/22, 08:34 AM	40	40	✓ Auto Approved	7 yr, 6 mo	
<input type="checkbox"/>	10/14/22	Phil Harvey 12345	Design	Weekly	Paid Time Off	12/10/22, 09:10 AM	8	8	✗ Denied	13 yr	
<input type="checkbox"/>	10/07/22	Phil Harvey 12345	Phil Harvey	Weekly	Paid Time Off	12/10/22, 09:22 AM	8	8	✗ Auto Denied	11 yr 2 mo	

### Review the features for the Time Off Requests:

- Search bar: search for specific employees
- **Bulk Actions:** Export Time Off Request data as a CSV
- **Record Absence:** See the section Entering a Time Off Request or Recording an Absence
- Column fields:
  - **Date(s) Requested:** Use this field to change the date range. The default date range is one month prior to the current day to three months after the current day.
  - **Employee:** Sort employees in alphabetical order.
  - **Manager:** Filter time off requests by **Manager**.
  - **Department:** Filter time off requests by **Department**.
  - **Paygroup:** Filter time off requests by **Paygroup**.
  - **Time Off Type:** Filter time off requests by **Time Off Type** (either Paid Time Off or Vacation)
  - **Date Submitted:** Sort in ascending or descending order.
  - **Hours Available:** Sort in ascending or descending order.
  - **Hours Requested:** Sort in ascending or descending order.

- **Status:** Filter time off requests by **Status**.
  - **Note:** An **Auto Approved** or **Auto Denied** status is created if you are using the **Auto Approve/Deny** feature of **Time Off Advisor**.
- **Tenure:** Sort in ascending or descending order.
- **Action:** **Approve**, **Deny** or **View Details** by clicking on the Gear Icon symbol

## APPROVING OR DENYING A REQUEST


Follow these steps to take action on a time off request:

1. Hover on a line you want to work with and click the **gear icon**.


2. Click **Approve** or **Deny**, or click **View Details**.

Time Off Requests Saved to this PC

Search Employees... Q Bulk Actions Record Absence

Date(s) Requested	Employee	Manager	Department	Paygroup	Time Off Type	Date Submitted	Hours Available	Hours Requested	Status	Tenure	Action
07/29/2024	Shara Rangel	Fred Kurt	Catering Mngr	Faculty & Admin - Monthly	Paid Time Off	01/26/2024	19.013	8 Hours	Pending	18 yr, 4 mo	

**Action**



Approve

Deny

View Details

3. Within **View Request Details**, select to either **Approve Request** or **Deny Request**. Within the details, review the requested hours, any scheduled hours or shifts for the employee, as well as any requests from other employees for the same day(s). The employee's available balance and their notes to you are also available.

## Request Details

### Status

Request Submitted by Shara Rangel on 01/26/2024, 10:52 AM

▲ Pending

### Time Off Type

Paid Time Off

### Total requested hours

8

### Available Balance (including approved requests)

-52.987

### Requested Days & Hours

Day of Week	Schedule	Requested Type	Requested Hours	Requests from Other Employees
Mon, 07/29/2024	--	Full Day	8 Hours	0
Total requested hours			8	

### Notes for Employee:

If a note is not added, we'll use the default note of "Your time off request was approved." or "Your time off request could not be approved."

0 / 300

### Supervisor Note

VACA

[Cancel](#)

[Deny Request](#)

[Approve Request](#)

4. If you select **Deny Request**, a comment is required. A sample response is provided, or type in another response.

5. Once an action is selected, a green message bar appears to confirm a notification has been sent to the employee.

### Notes:

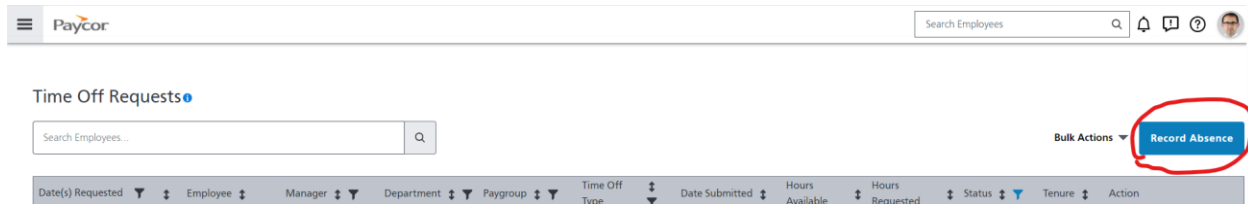
- Approved time off requests update available balances on the employee profile but will not automatically add those hours to the paygrid unless manually entered or imported (via time cards or file import).
- For any time off requests approved after the time off date has passed and the payroll for those days has already been processed, the available accrual balance will not update and will either need a manual accrual adjustment, or an admin must record the absence.



## ENTERING A TIME OFF REQUEST OR RECORDING AN ABSENCE

Follow these steps to submit a time off request or absence:

1. In **Paycor**, in the left column, click **Time** and then click **Time Off Requests**. The **Time Off Requests** screen appears.
2. At the upper-right, click **Record Absence**. The **Record Absence** window appears.



3. In the **Select Employee** field, search for the employee whose absence you would like to record.

A screenshot of the 'Record Absence' form in the Paycor application. The form is titled 'Record Absence' and has a 'Back to Time Off Requests' link. It includes a 'Select Employee' field with 'Lambrecht, Melissa - # 95906' selected. Below this is a 'Time Off Type' dropdown menu set to 'Paid Time Off'. There are 'Start' and 'End' date fields with a calendar icon. To the right of these fields are three balance boxes: 'Available Balance' (37.0157 hrs), 'New Balance Preview' (37.0157 hrs), and 'Future Balance' (forecasted as of date requested off). Below these is a 'Days & Hours Absent' section with a table header including 'Day of Week', 'Schedule', 'Request Type', 'Partial Day Request Details', and 'Hours Absent'. There's a text input field for 'Notes for Employee' with a character count of 0/300. At the bottom right, there are 'Cancel' and 'Submit' buttons.

- The **Available Balance** shows the number of hours you have available. Upcoming approved time off requests have already been deducted from this number.
- The **New Balance Preview** shows the number of hours you will have available, once your current request is approved.
- The **Future Balance** shows how much time off you will have available on the date you selected as the **Start Date** of your time off request.

### Notes:

- Next to the Employee Name you can **Change** the employee
- Under **Time Off Type**, if the Employee has Vacation then you can change between Paid Time Off and Vacation
- Beneath **Time Off Type**, you can review **Time Off Rules**

4. In the top-right part of the screen, you can view the employee's **Available Balance** and their **New Balance Preview**. The **New Balance Preview** takes into account previously approved time off requests. Complete these fields:

- **Time Off Type:** Select the type.
  - **Note:** If your organization only has one type available, no action is needed.
- **Start and End:** Select the date or date range. After you complete the **Start** and **End** fields, the **Days & Hours Absent** table updates.
  - If you request a single day, complete only the **Start** field.
  - If you request multiple days, complete **both** the **Start** and **End** fields.
  - You **cannot** request a date range across days that are not worked, such as Friday to Monday when Saturday and Sunday are **not** work days. In this case, you would enter Friday, and then separately enter Monday.
  - You can enter a date in the past, but **only** if the date has **not** been processed in a payroll. If the date you enter has been processed, this error message appears:

Oops! You can't request time off during this pay period (07/28/2018 - 08/10/2018), it was already processed.

5. After the **Days & Hours Absent** table updates with your selections, in the **Request Type** column, for **each** day, select whether the request is for a **Full Day** or a **Partial Day**. If the request is for a **Partial Day**, enter the number of hours for the request in the **Partial Day Request Details** column.

- If you use schedules, you can view scheduled hours or shifts to help enter the correct number of hours to request off in the **Schedule** column.
- If the date(s) requested are holidays based on your assigned holiday policies, a message is displayed

6. In the **Notes for Supervisor** field, enter notes and click **Submit**.

Days & Hours Absent

<input checked="" type="checkbox"/> Day of Week	Schedule	Request Type	Partial Day Request Details	Hours Absent
<input checked="" type="checkbox"/> Mon, 02/12/2024	--	Full Day		8

Days & Hours Absent

<input checked="" type="checkbox"/> Day of Week	Schedule	Request Type	Partial Day Request Details	Hours Absent
<input checked="" type="checkbox"/> Mon, 02/12/2024	--	Partial Day	From HH:MM to HH:MM	8

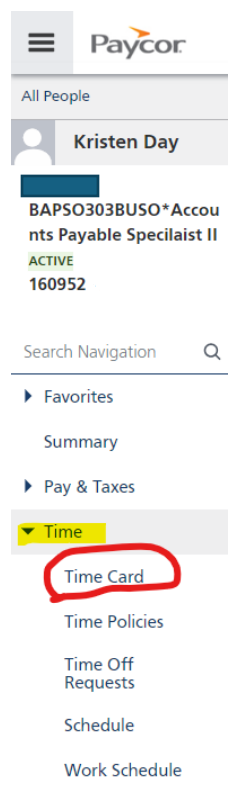
Total Requested Hours: 8

## CHANGING A TIME OFF REQUEST

- Employees are able to edit requests that are still pending, including removing the request or editing the Accrual Balance used for the request, Number of Hours, or Date. You will receive a notification when a request has been updated.
- Once a time off request has been approved, the employee has the ability to cancel the request. You will receive a notification when a cancellation has been sent.
- Managers cannot edit pending time off requests, only employees can edit their own pending time off requests.
- Managers can edit approved time off from the timesheet.

To edit a time off request:

- **OPTION 1:** Navigate to **Time > Time Off Requests**. Filter to find the time off request and click **View Details**. You can **Cancel** or **Deny** the time off request and recreate it.
- **OPTION 2:** Navigate to **People > All People**. Click on the employee's name. In the employee summary window, navigate to **Time > Time Off Requests** to view the employee's **Time Off Activity** screen. View the details of a time off request, cancel or deny the time off request and submit a new request using **Record Absence**.
- **OPTION 3:** Edit an employee's time off directly on their timesheet.



## On the Time Card – Time Entry click Add Hours

Kristen Day  
EE: 561371, Badge: 561371, Manager: Darin Lamont, Department: 22633030001524 - Accounts Payable Specialist II

Welcome to the new time card! [Bulk Add Punches](#) [Action](#) [Print Timesheet](#) [Approve](#) No Approvals

Period Summary Total Scheduled: 0.0000 Total Hours: 0.0000

Dates	Schedule	Time Entry	Department	Job Codes	Pay Item	Amount	Department	Job Codes
Mon, 01/29	+	+ ▼			+			
Tue, 01/30	+	+ ▼			+			
Wed, 01/31	+	+ ▼			+			
Thu, 02/01	+	+ ▼			+			
Fri, 02/02	+	+ ▼			+			
Sat, 02/03	+	+ ▼			+			
Sun, 02/04	+	+ ▼			+			
OT Week End								

Period Summary

Dates	Schedule	Time Entry	Department	Job Codes
Mon, 01/29	+	+ ▼		
Tue, 01/30	+	+ ▼		
Wed, 01/31	+	+ ▼		
Thu, 02/01	+	+ ▼		
Fri, 02/02	+	+ ▼		
Sat, 02/03	+	+ ▼		
Sun, 02/04	+	+ ▼		
OT Week End				

Enter the **Hours Amount** and the **Start Time**; change the Earning type to **PTO or VAC**; then click **SAVE**

×
Hours Entry Details

Date  
Mon, 01/29/24

Hours Amount  
8

Start Time  
08:00 AM

Apply All Policies ⓘ  
☒ Apply All

Earning  
PTO

Activity Type  
Work

Department  
22633030001524 - Accounts Payable

The hours should now appear on the **Time Card**

Kristen Day

Welcome to the new time card! ▼

EE: 561371, Badge: 561371, Manager: Darin Lamont, Department: 22633030001524 - Accounts Payable Specilaist II

Period Summary						
		Time and Hours				
Dates	Schedule	Time Entry	Department	Job Codes	PTO	Daily Totals
Mon, 01/29	+	8.00 Hours Added	22633030001...	Select	8.0000	
		+ ▼			8.0000	8.0000

If the hours are incorrectly added then next to the **Time Entry** click on the 3 dots to **View/Edit Hours Details** or **Delete Hours**

Period Summary						
		Time and Hours				
Dates	Schedule	Time Entry	Department	Job Codes	PTO	Daily Totals
Mon, 01/29	+	8.00 Hours Added	22633030001...	Select	8.0000	
		+ ▼			8.0000	8.0000
Tue, 01/30	+	+ ▼				
Wed, 01/31	+	+ ▼				