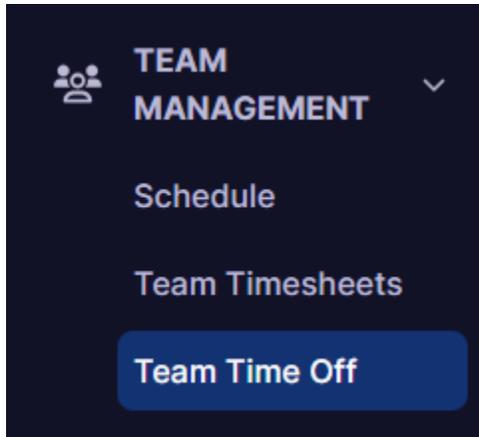


Team Time Off

You may access **Team Time Off** from the left menu under **Team Management**.



Team Time Off allows you to:

1. View all past present and future time off requests by their employees.
2. Edit Time Off requests
3. Add or subtract from the team's accrual balance.

Waiting for Your Approval Section

The **Waiting For Your Approval** section is the landing page for the **Team Time Off** page, and contains any time-off requests that submitted for approval that require your approval.

Team Bookings Section

In the Team Bookings section you can:

1. Search the time-off requests submitted for approval by employee name **(A)**.
2. Filter the employee's requests **(B)** by:
 1. Department
 2. Policy Requested
 3. Supervisor of the employee making the request
 4. Work Location
 5. Employment Type
 6. Employment Status (active, Terminated).

3. Perform **Bulk Actions (C)** to delete all checked requests.
4. Book time off on an employee's behalf with the **Add Time Off (D)**.

<input type="checkbox"/>	Name	Time Off Type	Booking Start Date	Booking End Date	Requested Duration	Actual Duration	Units	Status	Action
<input type="checkbox"/>	Joe Smith	Sick Leave	11/01/2023	11/02/2023	24.00	0.00	Hours	Waiting for Approval	✎ ✖

When manually adding time off for an employee, select the employee name from the dropdown, choose the time off type, and enter the start and end date for the time off request.

Please note that you can check the all day box, for a full 8 hours, or you can enter specific times. You will be automatically shown the employee's current time off balance, the amount of time requested, and the balance after booking.

Add Time Off

To manually add time off for an employee, select the blue **Add Time Off** button next to the search bar. Choose the employee and select their **Time Off Type**.

If this is for a full day or more, select the **All Day** checkbox. Alternately enter a start and end time for their time off, and optionally enter a comment.

Add Time Off



Employee

Joe Smith

Time Off Type

Sick Leave

All Day

Start time

12/01/2023 4:11 PM

End time

12/02/2023 4:11 PM

Comment

Attachment [Reset](#)

[Choose File](#)

No File Chosen

Repeat

AS OF DEC 02, 2023

HRS

Balance before this booking

40.00

Requested time of this booking

0.00

Balance after booking

40.00

No conflict with other employees' time off booking

[Close](#)

[Save As Draft](#)

[Submit](#)

If this time off reoccurs on a following week or month, you can click the **Repeat** checkbox at the bottom of the page. This will open a form so you can specify how to record these hours.

Repeat

Repeat Every

Week

Repeat on

Mon

Tue

Wed

Thu

Fri

Sat

Sun

Repeat Until

03/26/2024

Edit Time Off

To edit a time off request, select the name from the request list, and then select the blue **Edit** button on the lower left.

Edit Time Off



[Detail](#) [History](#)

Employee
Joe Smith

Time Off Type
Vacation.

All Day

Start Date
06/05/2024

End Date
06/05/2024

Comment

AS OF JUN 05, 2024	HRS
Balance before this booking	69.95
Requested time of this booking	8.00
Balance after booking	61.95

No conflict with other employees' time off booking

Attachment [Reset](#)
[Choose File](#) No File Chosen

Repeat

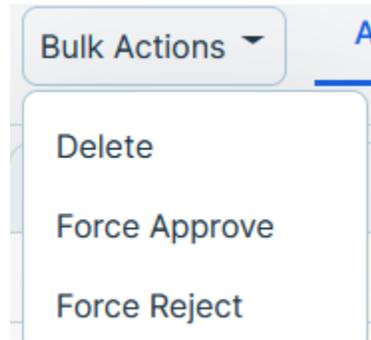
[Edit](#)

[Close](#) [Force Approve](#) [Force Reject](#)

Make the changes you need, and select **Submit**.

Once you submit the time off for this person, you must approve it. From the main screen, select the checkbox to the left of the the employee's name, and select the **Bulk Actions** dropdown.

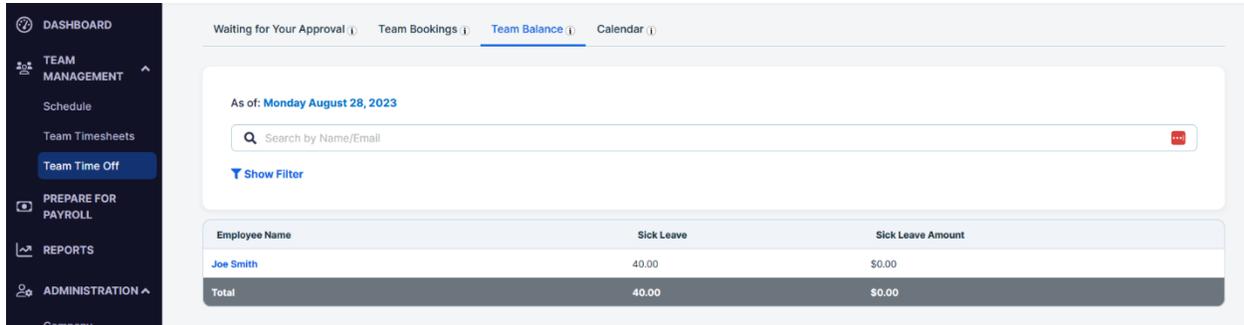
You may delete the request, approve, or reject the time off. If you need to reject the time off, there will be a comments box for you to inform the employee of why their request was rejected. Once approved, the request row will show as approved.



Team Balance Section

The Team Balance section provides the ability see an entire team's current time-off balances for all assigned policies. To access the Team Balance section, select the **Team Balance** tab. You can:

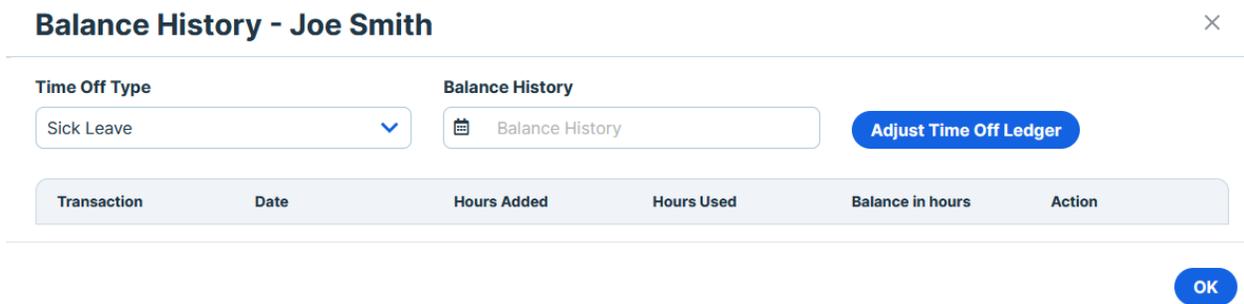
Search by employees.



Employee Name	Sick Leave	Sick Leave Amount
Joe Smith	40.00	\$0.00
Total	40.00	\$0.00

Balance History

View an employee's time off balance by clicking on their name, and filtering to the appropriate effective dates so you can see their history.



Transaction	Date	Hours Added	Hours Used	Balance in hours	Action
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Edit Time Off Balance

If you wish to edit an employee's time off balance, select the **Time Off Type** from the dropdown, and then select the **Adjust Time Off Ledger** button on the right.

Enter the effective date, and choose to either **Add** or **Subtract** hours from the employee's ledger.

Enter the note explaining the reason for the adjustment under **Transaction Details** and then select **Save**.

Adjust Time Off Ledger



Time Off Type * Unpaid Time Off

Date *

Add

Hours *

Subtract

Hours

Transaction *
Details

Enter notes related to this transaction here

Close

Save

Calendar Section

The Calendar Section displays an entire months worth of employee requests. This you know how approving or rejecting time off requests can effect the schedule.

Waiting for Your Approval (1) Team Bookings (1) Team Balance (1) **Calendar (1)**

Search by Name/Email [Book New Time Off](#)

Show Filter

December, 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	01 Joe Smith (Sick Leave)	02
03	04	05	06	07	08	09
10	11	12	13	14	15	16

By clicking on the date on the upper left of the calendar, you can filter for other months:

March, 2024

2024

Jan Feb **Mar** Apr

May Jun Jul Aug

Sep Oct Nov Dec