WORKFORCE ONE

Leave of Absence

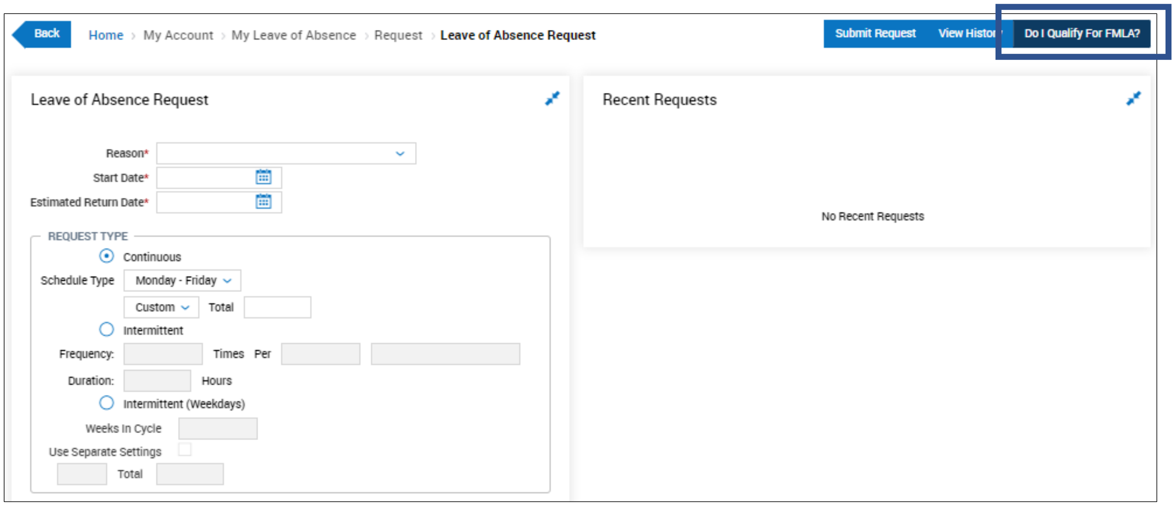
CONTENTS

Leave of Absence: Do I Qualify?

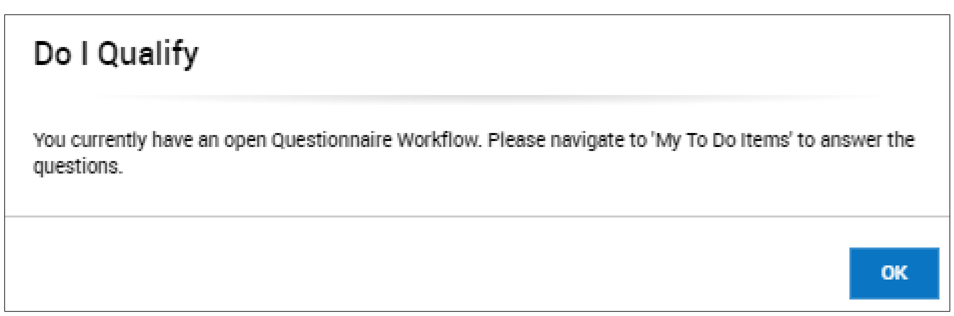
Employees can request a Leave of Absence if given the correct security permissions. This feature functions similarly to a Time Off Request where the employee must enter the Reason, Start and End Date, and Request Type.

Employees must be assigned a Leave of Absence Profile within their Employee Information account. Though it is not required, the employee can determine if they qualify for a leave by answering the questions online, before requesting a leave of absence.

1. Select the hamburger menu.
2. Select **My Account.**
3. Select **My Leave of Absence.**
4. Select **Request.**
   The window below is displayed.

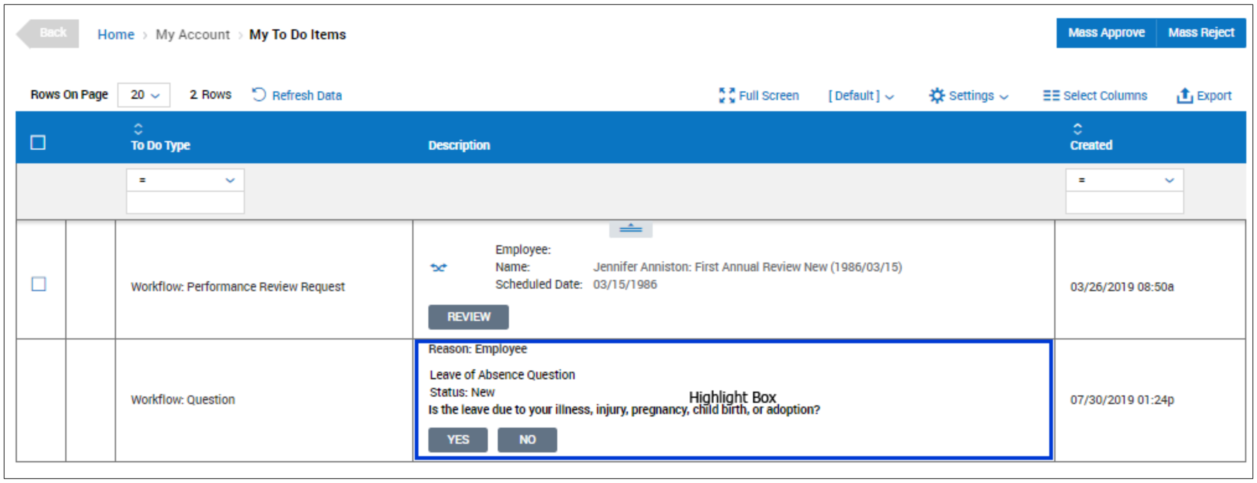


5. Select the **Do I Qualify For FMLA** button on the top right corner of the screen.
   This popup window displays.



6. Select the **OK** button.

7. Select the bell icon, your to-do items, at the top of your screen.
   The window below displays.

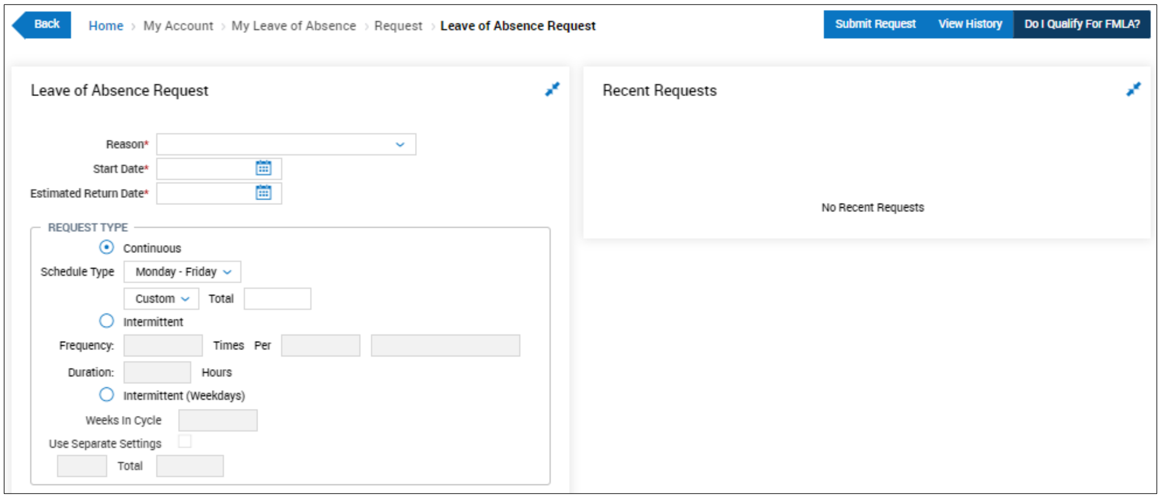


All the questions remain in the highlighted window above. The questions are customizable by client. For purposes of this demonstration, let's assume we've gone through the entire list of questions and the employee is eligible to take the leave.

8. Select OK at the end of the questionnaire.

Request a Leave of Absence

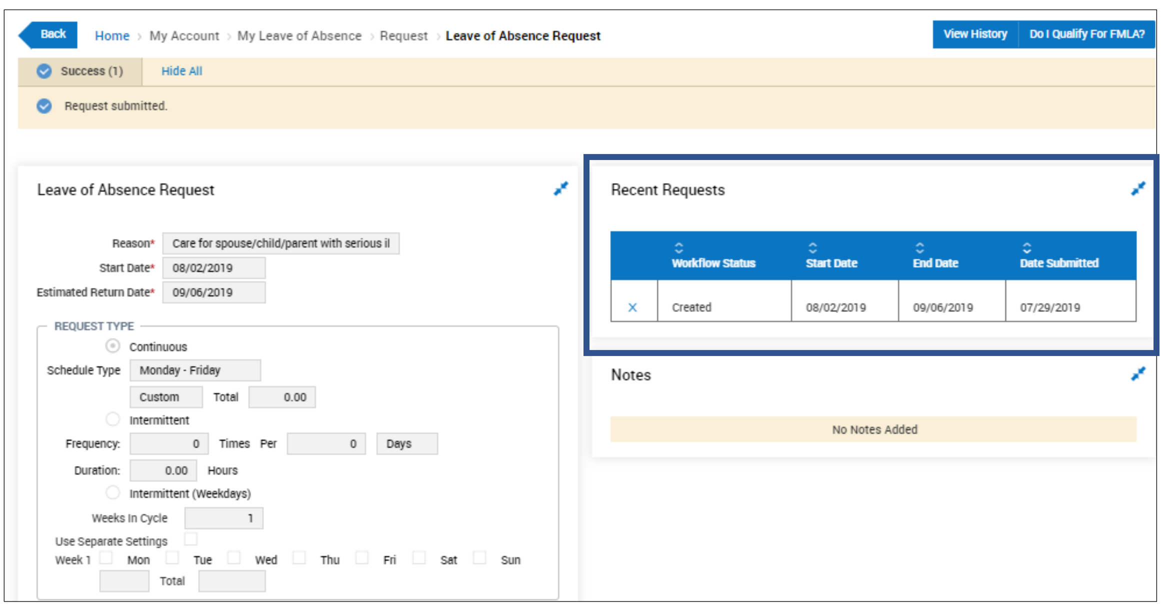
1. Select the hamburger menu.
2. Select My Account.
3. Select My Leave of Absence.
4. Select Request.
   The window below is displayed.



5. Enter the reason, start, and estimated return date.

In the Request Type area is where you would customize the type of time off requested. Continuous is a total amount of time with X number of hours spread over Y number of days. Intermittent is X number of times within a period (days or weeks) for a certain number of hours each time. In our example the person is going to be out for one week caring for a family member who is very ill.

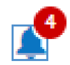
6. Select the **Submit Request** button.
   The following window displays showing the request was submitted but not yet approved.

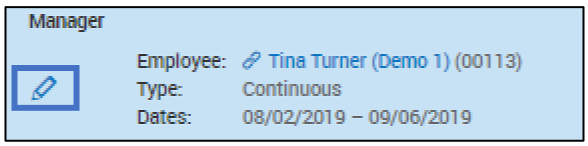


Your request has been successfully submitted and is now waiting for approval.

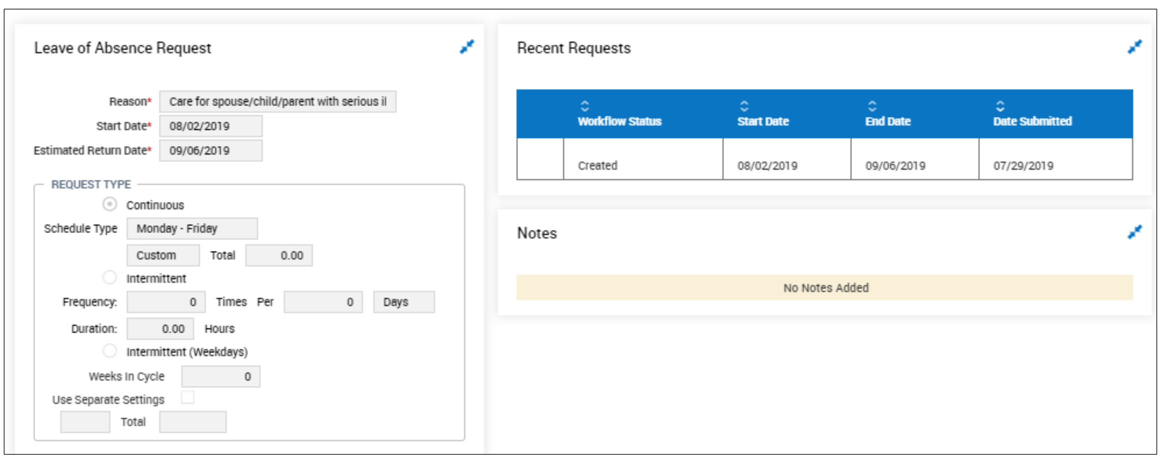
Manager Approval

Now let's log in as the employee's manager and approve or reject this employee's request for a leave of absence. The manager will be alerted to the request when they see their bell with a number on it.

1. Select the bell icon that shows you have to-do items. 
2. Select the pencil icon next to the Leave of Absence request.



The Leave of Absence request displays for review of the request details.



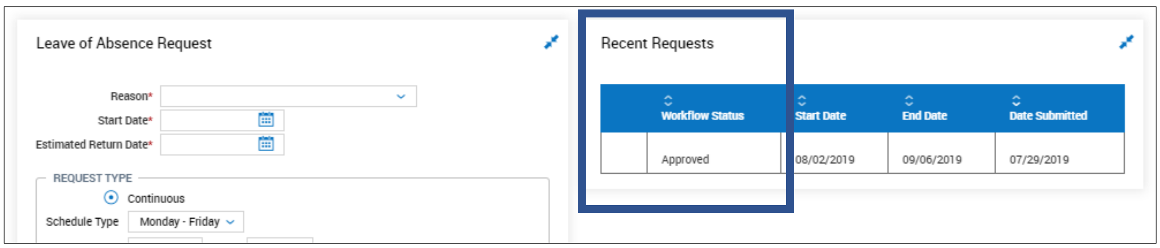
3. Select the back button.
4. Select either the **Reject** or **Approve** buttons.
5. Verify your selection in the pop-up window.

The employee's leave request has been rejected or approved based on your selection above and is now complete.

Employee Review

Now let's log in as the employee to see if our leave request has been approved or rejected.

1. Select the hamburger menu.
2. Select My Account.
3. Select My Leave of Absence.
4. Select Request.
   The following window will be displayed. Notice on the far right that the leave has been approved.



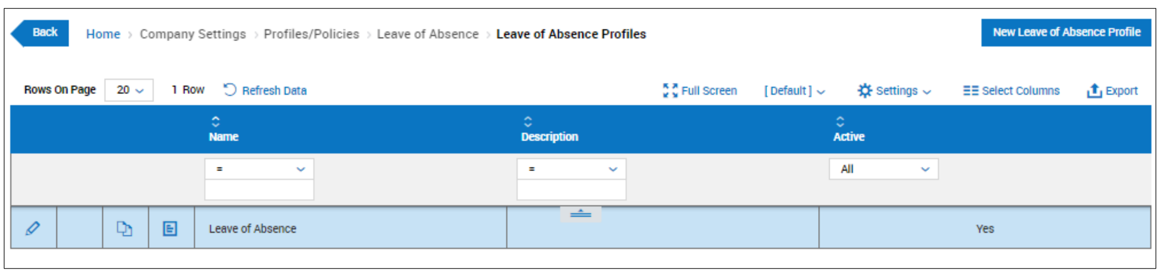
The leave has been approved and this request is now completed.

Leave of Absence Profiles

A client can have as many Leave of Absence profiles for different types of employees, for example, Part-time employees may have a different waiting period before becoming eligible for leave than Full-time employees. Therefore, two different profiles can be created to accommodate the different rules.

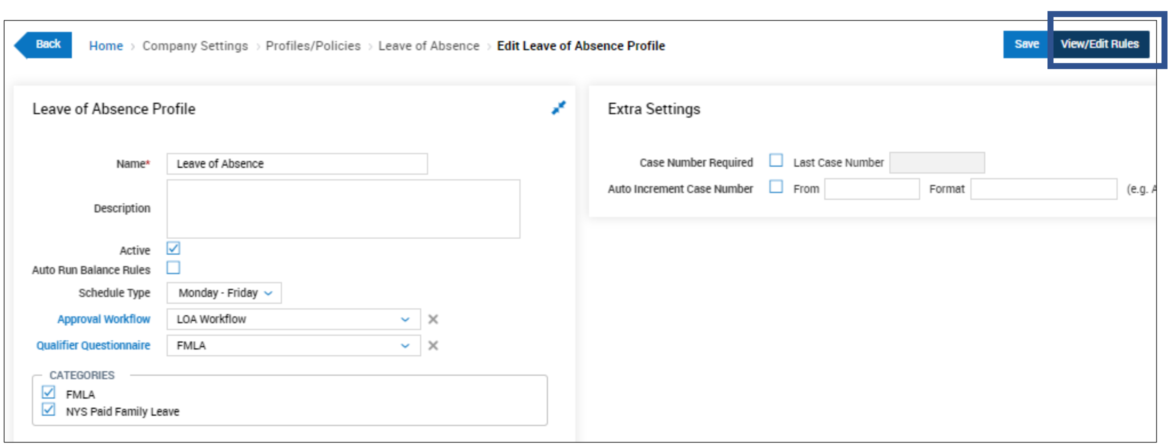
1. Select the hamburger menu.
2. Select **Company Settings**.
3. Select **Profiles/Policies**.
4. Select **Leave of Absence**.
5. Select **Profiles**.

   The following window displays. While multiple leave of absence profiles are possible, we only have one in our list. Let's review it now.



6. Select the pencil icon to review the Leave of Absence profile.

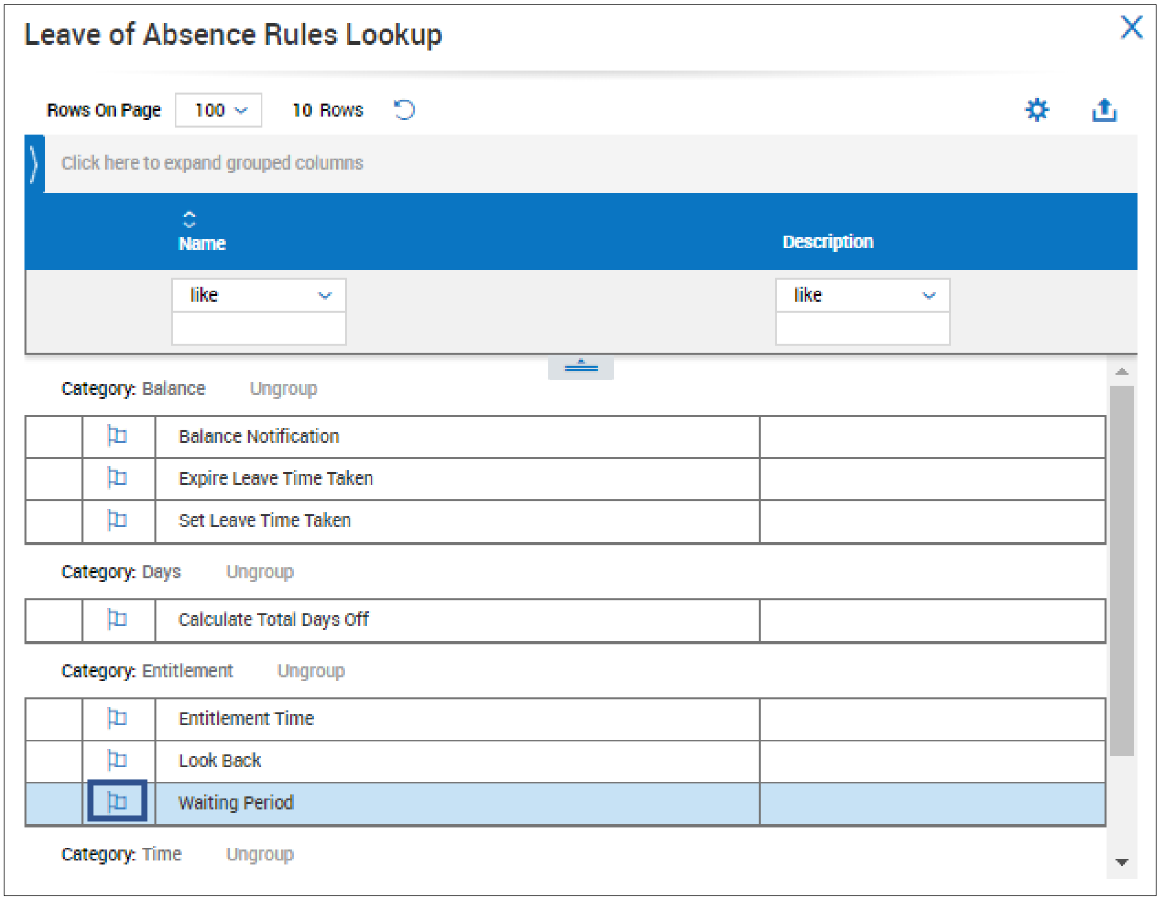
   The following window displays.



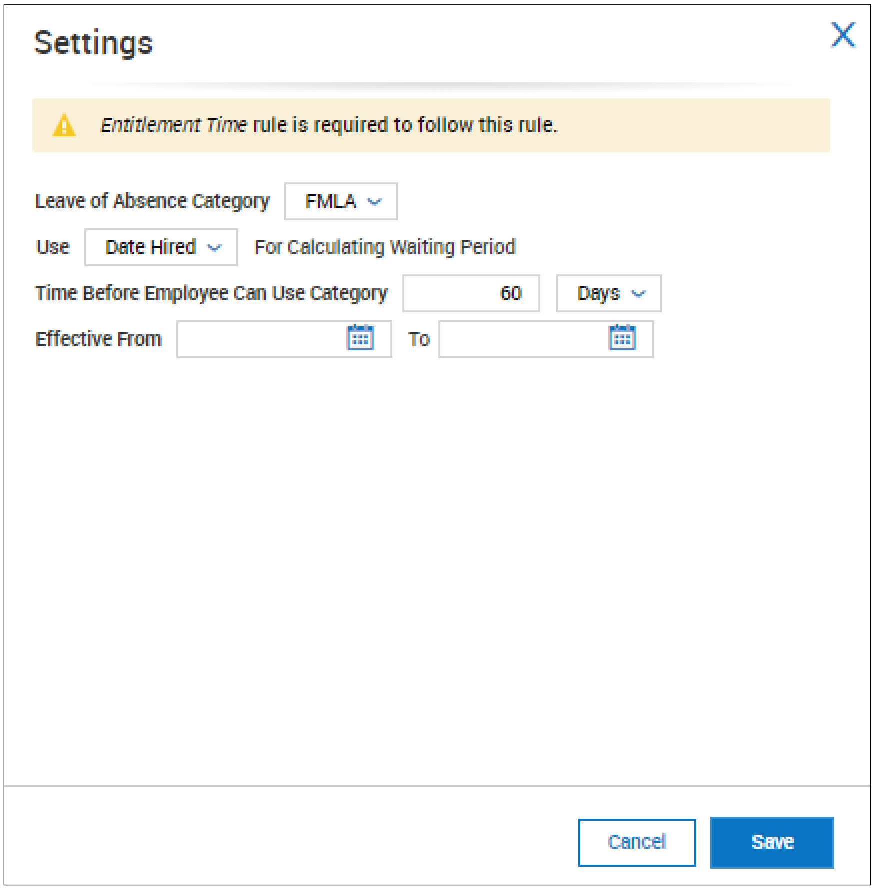
Rules may be added to Leave of Absence Profiles to control the resetting of balances, entitlements and the creation of time entries when employees are out on leave.

7. Select the **View/Edit Rules** button within their profile.
8. Select the **Add Rule** button.

   The following window displays. A rule can be defined to enforce a waiting period before an *employee can open a leave case. Multiple rules may be used within a profile if rules should vary from one category to another.*



9. Select the flag next to the Waiting Period Entitlement.
10. Select the pencil on the next window to configure the waiting period.
    The following pop-up displays.



11. Enter all applicable information and select the **Save** button.
12. Select **Save** on the following window.

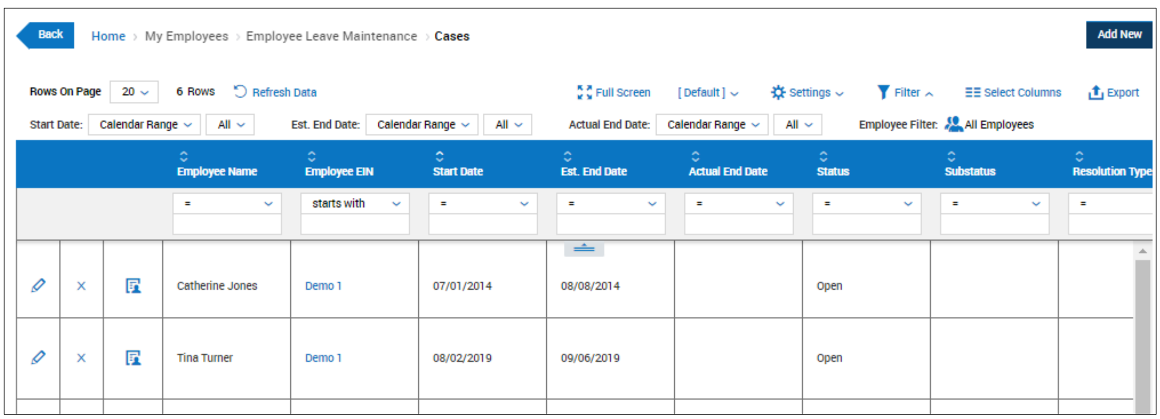
The rules have now been updated on this Leave of Absence profile.

Create a Case

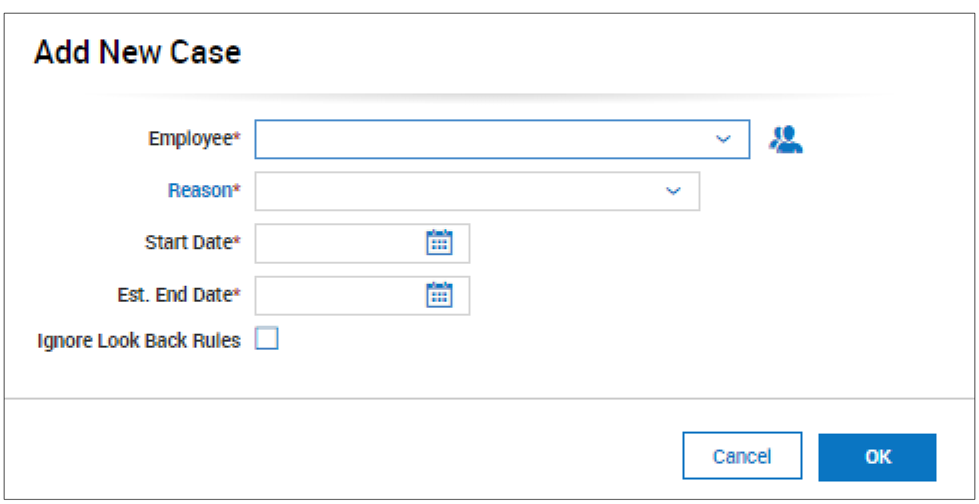
Once an employee is given a leave of absence, the employer will create a case. The case is used to track what kind of leave was taken, reason, how much, and what dates. Within the case you can view the leave balances like amount given, taken, and remaining.

Supporting documentation can be uploaded in the case (doctor's notes or other communication) relating to the leave. The employer can also run various reports in the case. Let's create and take a look at cases now.

1. Select the hamburger menu.
2. Select **My Employees**.
3. Select **Employee Leave Maintenance**.
4. Select **Cases**.
   The following window will display.



5. Select **Add New** button from top right of window.
   This pop-up will display.



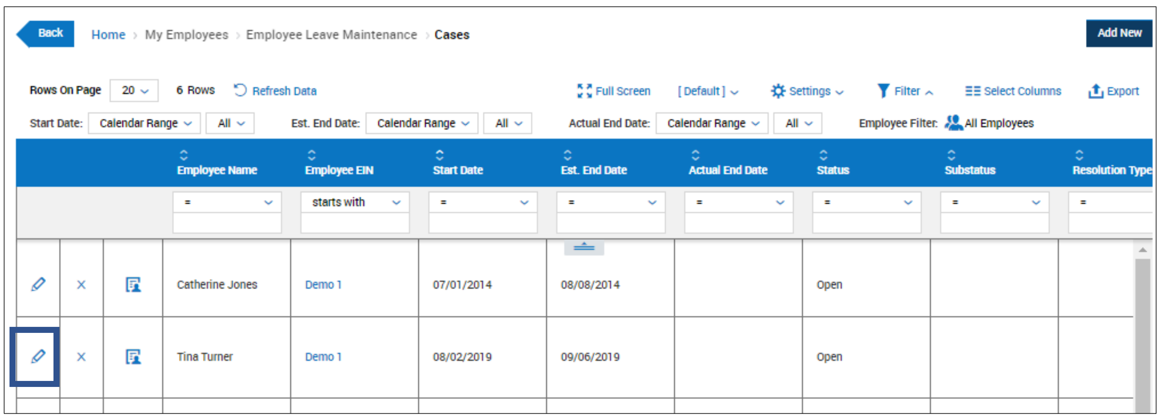
6. Select an employee from the drop-down menu.
7. Select a reason from the drop-down menu.
8. Enter a start and end date.
9. Assign a case number if required.
10. Select the **OK** button.
11. Select **Save** on the Case window.

The case has now been successfully completed.

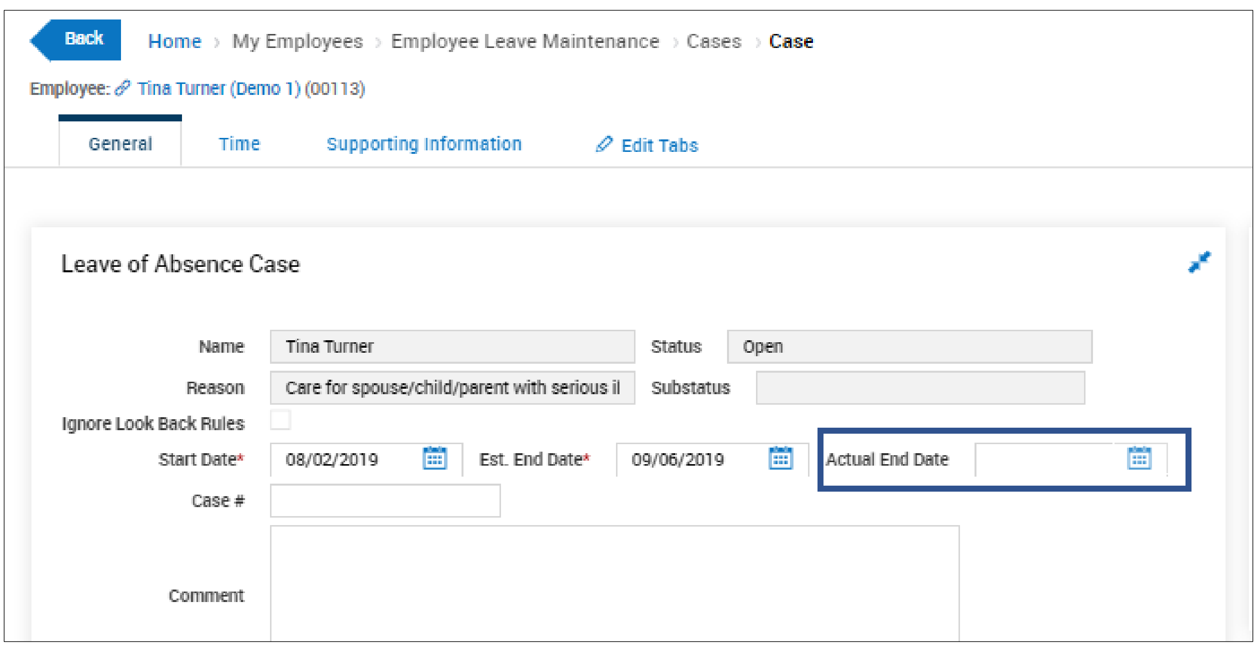
Close a Case

Let’s assume the employee has returned from leave. We will need to update their file to show the date they’ve returned and close their case.

1. Select the hamburger menu.
2. Select **My Employees**.
3. Select **Employee Leave Maintenance**.
4. Select **Cases**.
   The following window will display.

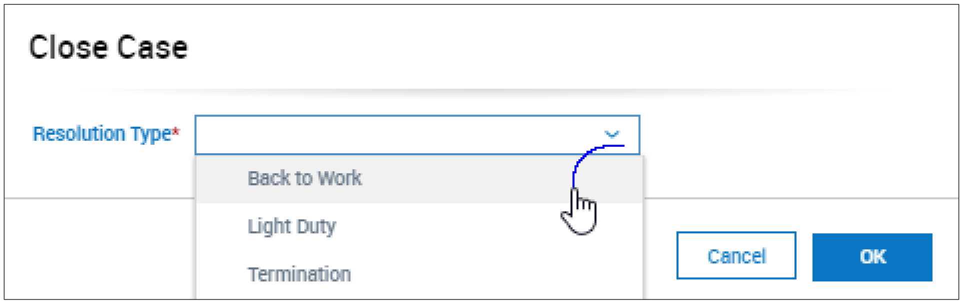


5. Select the pencil icon to modify (or close) the case.
   The case window will display.



6. Enter the actual date they returned to work.

7. Select the **Save** button.
8. Select the **Close Case** button.
   The following pop-up will display.



9. Select a resolution type from the drop-down menu.
10. Select **OK**.

The case is now closed.