Approving Time Off Requests (Time Off Approver)

This Quick Steps guide describes how to approve Time Off requests in Advanced HR 2.0. The intended audience is managers, supervisors, admins, and other time off approvers.

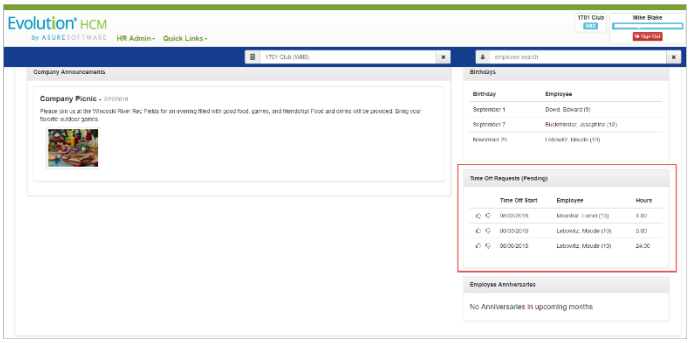
Employees request time off and an email is then sent to their designated time off approver (could be supervisor / manager /other).

Time off approvers receive an email notification that the employee has requested time off and they can approve, reject, edit, or cancel the time off request.

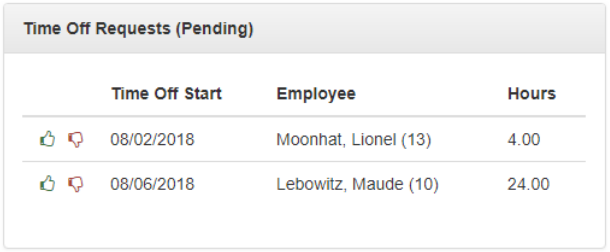
Approving a Time Off Request

Time off approvers receive an email notification when an employee has made a time off request. They can then Approve, Reject, or Cancel an employee's time off request by doing the following steps:

1. After an employee has submitted a time off request, the time off approver receives an email notification with a link to click on to approve or reject the request.
2. On the email notification concerning the time off request, click on the supplied link.
3. The system displays the approver's **Dashboard**.

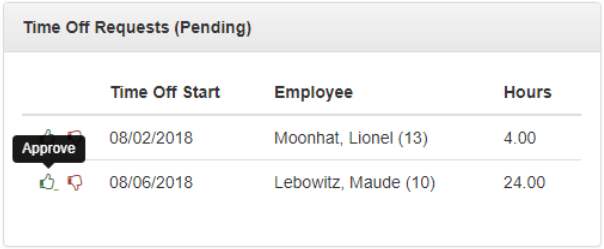


4. On the right side of the **Dashboard**, the system displays a **Time Off Requests (Pending)** tile which lists any new pending time off requests.



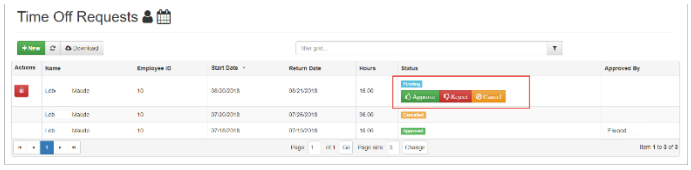
There are two different methods time off approvers can use to either approve or reject employee time off requests. Both methods are described below.

Method #1: You can *quickly* Approve (or Reject) the time off request from the **Dashboard** by simply clicking on the thumbs up (or thumbs down) icon to the left of the employee's name on the **Time Off Requests (Pending)** pane, shown below. If you use this method, the employee's time off request is approved (or rejected) and you are done.

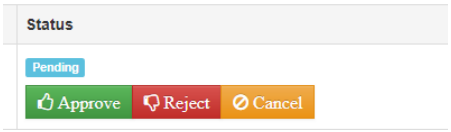


Best Practice, however, is to use Method #2 below, as that way, you will be able to view detailed information about the request before deciding to approve or reject it.

5. **Method #2:** You can also display the **Time Off Request** summary screen by navigating directly to **HR Admin** (or **Manager Service**) – **Employee Maintenance – Time Off** screen.
6. The system then displays the **Time Off Requests** summary screen listing the employees' time off requests. Any new requests will display a **Pending** label in the **Status** column.



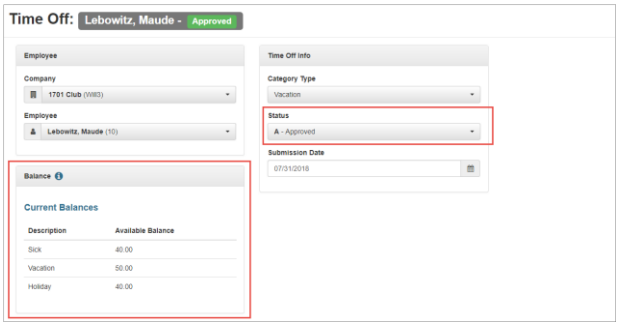
7. On the appropriate row of the **Time Off Requests** screen, in the **Status** column, do one of the following actions:



- To approve the employee's time off request, click on the green **Approve** button.
- To reject the employee's time off request, click on the red **Reject** button.
- To cancel the employee's time off request, click on the yellow **Cancel** button.

8. Click **Save Changes**.

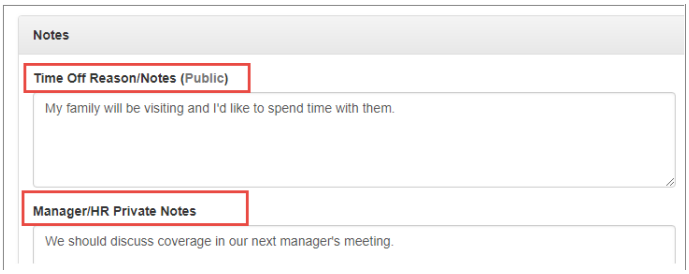
You can optionally click on a row on the summary screen to display the **Time Off Requests** detail screen where you can also Approve or Reject the time off request from there by changing the **Status** field to **Approved** (or **Rejected**).



The system displays the employee's **Balances** section on the left side of the screen, showing the **Current Balances** – **Available Balance** - the number of available hours by time off category type (Vacation, Sick, Holiday, etc.) as defined in Evolution Classic in the Time Off Accrual module.

Note: The **Available balances** reflect the total hours Accrued (to date) minus hours Used. Approved hours, which haven't been Used yet, are not reflected in the calculation.

The **Time Off Requests** detail screen also has two **Notes** sections:



- Any text in the **Time Off Reason/Notes (Public)** section are notes entered by the **employee** (and/or the approver) and can be viewed by anyone. The note also displays on the approval email notification.
- Any text in the **Manager/HR Private Notes** section are entered by the **time off approver** and are comments meant for Manager/HR viewing only.

Adding why a time off request was approved or rejected in the **Manager/HR Private Notes** section may be useful for documenting the historical record.

Only people with Manager role or higher can view the notes in the **Manager/HR Private Notes** section.

Results:

- The system displays a confirmation message "Operation completed successfully."
- The system approves, rejects, or cancels the employee's time off request, depending on which **Status** button you clicked.
- The system sends the appropriate email notification to the employee informing them of your action.
- The system updates the employee's **My HR – Time Off** screen to add this Pending/Approved/Rejected or Cancelled time off item to the time off history shown on their screen.
- When a manager/admin/other time off approver approves a user's time off request, that approved request flows from Advanced HR to Evolution.

For More Information

For more information about Time Off Accrual, the following documents are also available on the **Evolution Resource Center** for viewing/download:

- *Quick Steps Guide – Submitting Time Off Requests (Employees)*
- *Quick Steps Guide – Viewing Time Off Balances and Requests*

- *Time Off Accrual Feature in Advanced HR 2.0* (User Guide)

To access, go to the Evolution Resource Center, navigate to **Advanced HR 2.0** / **Time Off Guide**.