

SmarteHR Employee Leave



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EMPLOYEE LEAVE

OVERVIEW

The Smartetools Employee Leave module is a digital program that will replace the existing paper form currently used by the district. The new digital form will allow the user to electronically create, route and approve leave requisitons. Other functions available within the module include: adding notes, attaching files, and tracking requisiton movement and approval.

EMPLOYEE LEAVE REQUISITION

EMPLOYEE LEAVE REQUISITION LISTING PAGE

Below is the Employee Leave Requisition dashboard. As a user, you can view the requisitions you have created as well as view their current document step. This window shows the requisitions with a 'Pending Processing' status.

			Quick Li	nks							
		1		- 🖑 🔍 🍕		?					
New P	urch Req	Reports	Data Query	Change FY	Change	e Password	Help				
	Pending Documents										
Document #	Document Type	Status	Current Document Step	Date Arrived	Time at Current Step	Created By	Site/Dept				
LV18-00008	Employee Leave Requisition	New - Not Routed	New Employee Leave Request	01/11/18 02:14 PM	51m		Information Technology				
LV18-00007	Employee Leave Requisition	New - Not Routed	New Employee Leave Request	01/11/18 02:13 PM	52m		Information Technology				
LV18-00005	Employee Leave Requisition	Pending Approval	Site 1 Approval	01/10/18 04:52 PM	22h 13m		Information Technology				
LV18-00003	Employee Leave Requisition	Pending Approval	Site 2 Approval	01/10/18 12:50 PM	1d 2h 15m	Administrator,System	Information Technology				
LV18-00004	Employee Leave Requisition	Approved	Dept. Approver	01/10/18 12:31 PM	1d 2h 34m		Information Technology				

Note: If the user is also an approver the list will show the requisitions that need approval.

Once a requisition has been created, it will show one of the statuses listed below:

NEW EMPLOYEE LEAVE REQUEST: Requisition has not been routed by the originator for approval.

PENDING PROCESSING: Requisition has been routed from the 'New Requisition' step and is pending approval at another step. The requisition is still not completed and processed.

PROCESSED: Requisition has gone through all approval steps and is complete. By default, the dashboard displays all requisitions that have a **'Pending Processing'** status. For *originators,* this list contains requisitions still in the process of being approved and completed. For *approvers,* the requisitions listed are those that are waiting your approval and routing.

Defined below are the columns headers that appear on the list:

- 1. **Document #:** The Requisition number assigned to the requisition.
- 2. **Document Type:** The type of document request.
- 3. **Status:** The status of the requisition.
- 4. **Current Document Step:** The current step of the requisition.
- 5. **Date Arrived:** The date the requisition arrived at its destination.
- 6. **Site/Dept:** The site or department the requisition originated from.

To select a requisition, click on the hyperlink for the requisition under 'Document #' column. This will open the selected requisition and allow you to edit, route, print, and perform other functions.

Note: If the Requisition's status shows as 'Processed', it is only viewable and no modifications can be made.

	Pending Documents											
Document #	Document Type	Status	Current Document Step	Date Arrived	Time at Current Step	Created By	Site/Dept					
LV18-00008	Employee Leave Requisition	New - Not Routed	New Employee Leave Request	01/11/18 02:14 PM	51m		Information Technology					
LV18-00007	Employee Leave Requisition	New - Not Routed	New Employee Leave Request	01/11/18 02:13 PM	52m		Information Technology					
LV18-00005	Employee Leave Requisition	Pending Approval	Site 1 Approval	01/10/18 04:52 PM	22h 13m		Information Technology					
LV18-00003	Employee Leave Requisition	Pending Approval	Site 2 Approval	01/10/18 12:50 PM	1d 2h 15m		Information Technology					
LV18-00004	Employee Leave Requisition	Approved	Dept. Approver	01/10/18 12:31 PM	1d 2h 34m		Information Technology					

SEARCH FOR AN EXISTING EMPLOYEE LEAVE REQUISITION

There are two ways to search for an existing requisition. Go to **Personnel > Employee Leave >** and click on **Employee Leave Req.** This will open the 'Employee Leave Req Search' screen.

ile 🚸 Genei	ral Ledger 🛛 🗧 Purch	asing / AP 🛛 🕀	Warehouse , Work O	rder 😽 Perso	onnel 🕂 Reports	/Query 👆 Adm	in 🔸
Dashboard	Help 01/11 15.05	FY: 2018	User: Admi	nistrator,Sy ^{, Per}	rsonnel 🕨 g	ools Demo School I	District Logou
			- · · · ·		avel Req 🛛 🕨 🕨		
			Quick Li	nks Tim	ne Card 🛛 🕞		
		1		- 🧳 🖿	iployeeLeave 🔉	Employee Leave R	leq 💦
New P	urch Req	Reports	Data Query	Change FY	Change	Leave Process Per	iod Help
			Pending Doc	uments			
Document #	Document Type	Status	Current Document Step	Date Arrived	Time at Current Step	Created By	Site/Dept
V18-00008	Employee Leave Requisition	New - Not Routed	New Employee Leave Request	01/11/18 02:14 PM	51m	Administrator,System	Information Technology
V18-00007	Employee Leave Requisition	New - Not Routed	New Employee Leave Request	01/11/18 02:13 PM	52m	Administrator,System	Information Technology
V18-00005	Employee Leave Requisition	Pending Approval	Site 1 Approval	01/10/18 04:52 PM	22h 13m		Information Technology
V18-00003	Employee Leave Requisition	Pending Approval	Site 2 Approval	01/10/18 12:50 PM	1d 2h 15m	Administrator,System	Information Technology
V18-00004	Employee Leave Reguisition	Approved	Dept. Approver	01/10/18 12:31 PM	1d 2h 34m	Administrator,System	Information Technology

FY: 2018 Employee Leave Reg Employee Leave Prefs Employee Info n Dashboard C Refresh 9 Help 01/12 13:30 oloyee Leave Req Search ditional Search Options Requisition Status: All ~ Employee Number: Employee First/Last Name Contains: Search Reset Create Employee Leave Req Employee Leave Requisitions Drag a column header here to group by that column Reg Name Req Number Leave Process Period Current Step Request Site Requester Name Date Entered New Employee Leave
Request
New T • - + Apply 👻 ٣ ۴ ٣ 2017-18 Fiscal Year Leave Entries Select January LV18-00008 Information Technology Mary Anne Multer 01/11/2018 2017-18 Fiscal Year Leave Entries New Employee Leave Request Select February Entries LV18-00007 Maintenance & Operations Sys Admin 01/11/2018 2017-18 Fiscal Year Leave Entries Select Additional Sick Time LV18-00006 New Employee Leave Request 01/11/2018 SEC / Food Services Ray

The 'Employee Leave Req Search' screen:

The top area will allow the user to search for a leave requisition by: Requisition Status, Employee Number, or Employee name.

File 🕀 G	eneral Ledger	🗄 Purchasing / A	AP 🚸 Warehouse 🐳	Work Order 🛛 🕀	Personnel 🕂	Reports/Query 🕂	Admin 🔸					
Dashboard	Help 0	1/11 15.25	2: 2018	User: Admi	nistrator,System	District: Smarteto	ools Demo School District					
Employee Leave Req Search												
1	Requisition Status: 4	All	\checkmark	Rec	uisition Number:							
E	Employee Number:				Employee Name:							
	Current Step: -	None -	\checkmark	Da	te Entered From:	To:	\sim					
	Request Site: -	None -	\checkmark									
			Sear	rch Reset								
Create Empl	oyee Leave Req											
			Employee	Leave Requisition	ns							
Drag a colum	n header here to grou	p by that column										
	Req Name	Req Number	Leave Process Period	Current Step	Request Site	Requester Name	Date Entered					
Apply	Ŷ	Ŷ	Ŷ	Ţ	Ŷ	Ŷ	~ ?					
Select	January	LV18-00008	2017-18 Fiscal Year Leave Entries	New Employee Leave Request	Information Technology	Mary Anne Multer	01/11/2018					
Select	February Entries	LV18-00007	2017-18 Fiscal Year Leave Entries	New Employee Leave Request	Maintenance & Operations	Sys Admin	01/11/2018					
Select	Additional Sick Time	LV18-00006	2017-18 Fiscal Year Leave Entries	New Employee Leave Request	SEC / Food Services	Ray	01/11/2018					
Select	February Entries	LV18-00005	2017-18 Fiscal Year Leave Entries	Site 1 Approval	Purchasing Department	Kaleena Gonzalez	01/10/2018					
Select	January Entries Santa Fe	LV18-00004	2017-18 Fiscal Year Leave Entries	Dept. Approver	Santa Fe High School	Kaleena Gonzalez	01/10/2018					
Select	January Entries	LV18-00003	2017-18 Fiscal Year Leave Entries	Site 2 Approval	Personnel Department	Kaleena Gonzalez	01/10/2018					
Select	Sick Event	LV18-00002	2017-18 Fiscal Year Leave Entries	Site 1 Approval	SEC / Food Services	Ray	01/10/2018					
Select	Vacation Request	LV18-00001	2017-18 Fiscal Year Leave Entries	Dept. Approver	Adult School	Test User	01/10/2018					
Page 1 of 1 (8 Requisitions)	1										
L												

The bottom area allows the user to search for a requisition by the following filters: Req Name, Req Number, Leave Process Period, Current Step, Request Site, Requester Name, and Date Entered.

File 🔸 G	eneral Ledger 😽	🕴 Purchasing / A	.P 🕀 Warehous	e 🕴	Work Order 🛛 🕀	Personnel 🕂	Reports/Query 😽	Admin 🕂				
Dashboard	Help 01	1/11 15.25 FY	: 2018		User: Admi	nistrator,System	District: Smarteto	ols Demo School District				
Employ	Employee Leave Req Search											
F	Requisition Status: A	All	~		Rec	uisition Number:						
Employee Number: Employee Name:												
	Current Step: - None - V Date Entered From: To: V											
	Request Site: -	None -	~									
	Search Reset											
Create Empl	oyee Leave Req											
			Emp	loyee	Leave Requisition	ns						
Drag a colum	n header here to grou	p by that column										
	Req Name	Req Number	Leave Process Perio	d	Current Step	Request Site	Requester Name	Date Entered				
Apply	Ŷ	Ŷ		Ŷ	۴	۴	Ŷ	Ψ 9				
Select	January	LV18-00008	Begins with Contains	Leave	New Employee Leave Request	Information Technology	Mary Anne Multer	01/11/2018				
Select	February Entries	LV18-00007	Doesn't contain	Leave	New Employee Leave Request	Maintenance & Operations	Sys Admin	01/11/2018				
Select	Additional Sick Time	LV18-00006	Ends with	Leave	New Employee Leave Request	SEC / Food Services	Ray	01/11/2018				
Select	February Entries	LV18-00005	Equals Doesn't equal	Leave	Site 1 Approval	Purchasing Department	Kaleena Gonzalez	01/10/2018				
Select	January Entries Santa Fe	LV18-00004	2017-18 Fiscal Year Entries	Leave	Dept. Approver	Santa Fe High School	Kaleena Gonzalez	01/10/2018				

The user can also narrow the search by using the filters in the dropdown for each column. The available filters include: Begins with, Contains, Doesn't contain, Ends with, Equals, and Doesn't equal.

CREATE AN EMPLOYEE LEAVE REQUISITION

To create an Employee Leave Requisiton, go to **Personnel > Employee Leave > Employee Leave Req.**

ile 🚸 Gener	al Ledger 🛛 🔸 Purch	asing / AP 🛛 🔸	Warehouse , Work O	rder 🚸 P	ersonnel 🐥 Repo	orts/Query 🔶 Adr	nin 🔸
Dashboard	Help 01/11 15.37	FY: 2018	User: Admi	nistrator,Sy	Personnel	ools Demo School	District Logout
			- 11 H		Travel Req 📃 🕨 🕨		
			Quick Li	nks	Time Card 📃 🕨		~
				ا 🕑 (EmployeeLeave 🕞	Employee Leave I	leq 💸
		Reports	Data Query	Change FY	Cha	ng. Leave Process Pe	iod Help
			Pending Doc	uments			
Document #	Document Type	Status	Current Document Step	Date Arriv	ed Time at Curren Step	t Created By	Site/Dept
V18-00008	Employee Leave Requisition	New - Not Routed	New Employee Leave Request	01/11/18 02: PM	¹⁴ 1h 23m	Administrator,System	Information Technology
V18-00007	Employee Leave Requisition	New - Not Routed	New Employee Leave Request	01/11/18 02: PM	¹³ 1h 24m	Administrator,System	Information Technology

The Employee Leave Req screen will open. This screen will display a list of requisitions previously created by the user as well as list those that are pending approval by the user.

File 🛛 🕴 General Le	lger	🕈 Purchasin	g / Af	🛛 🔸 Warehous	e 🕴	Work Order	•	Personnel 🔸	Reports/Query	♦	Admin 🔶		
Dashboard Help	0	1/11 15.43	FY:	2018		User: Ad	mir	nistrator,System	District: Smar	teto	ols Demo Sch	ool Di	strict
Employee Lea	Employee Leave Req Search												
Requisition	Status:	All		\checkmark			Req	uisition Number:					
Employee N	umber:						E	Employee Name:					
Curren	t Step:	- None -		\checkmark			Dat	e Entered From:	∽ To:		~		
Reque	st Site:	- None -		\checkmark									
					Sear	ch Reset							
Create Employee Leave	Req												_
				Empl	oyee	Leave Requisi	tior	15					
Drag a column header he	re to grou	p by that colum	ı										
Reg Name		Req Number		Leave Process Period	1	Current Step		Request Site	Requester Name		Date Entered		
Apply	٩		Ŷ		٩		Ŷ	Ŷ		۴		- 9	
Select January		LV18-00008		2017-18 Fiscal Year Entries	Leave	New Employee Leave Request		Information Technology	Mary Anne Multer		01/11/2018		
Select February I	intries	LV18-00007		2017-18 Fiscal Year Entries	Leave	New Employee Leave Request		Maintenance & Operations	Sys Admin		01/11/2018		

Click on 'Create Employee Leave Req' button. This will open the 'Employee Leave Req' screen.

File > Person	(File > Personnel > Reports/Query > Time Card >										
🗋 Time O)ff Req										
Reg Sele			0 I	👶 Re	eload All New Time Off Req Filters	:					
List	 All 	that need my	1		Req Name	Req Number ↓	Leave Process Period	Requester Name	Comment		
Requisitions:	that I have	approval		1	December new	TOR00024	December Entries	hhaley			
	approved	that I created		2	December leaves	TOR00023	December Pay Period	HJefferson			
Employee:			2	3	December Classified Leave	TOR00022	December Pay Period	HHaley			
				4	Nov BCSD Leaves	TOR00021	05 November Pay Period	hhaley			

Note: The 'Leave Process Period' is based on the fiscal year.

File 🕴 General Ledger 🔸 Pu	rchasing / AP 🛛 🕀 Ware	house 😽 Work	c Order 🛛 😽 Pers	onnel 🕀 Repo	rts/Query 🕂 A	dmin 🔸				
Dashboard Help 01/11 1	.5.46 FY: 2018	Us	er: Administrato	System Distri	ct: Smartetools [emo School Dist	rict Logout			
Employee Leave Requisitio	n									
Employee Leave Requisitio										
Edit Save Cancel Ba	ack to Req Search Notes	History Print	Attachments							
Action:			Go							
Reg Number:				Current Step:	Status:					
Req Name:				Request	Site: Information Te	chnology 🔻				
Requested By:				Leave Process Pe	riod: 2017-18 Fiscal	Year Leave Entries	✓			
Comment:										
Employee Leave Entries										
Drag a column header here to group by th	at column									
New Leave Ent Employee Name	Leave Action	Start Date	End Date	Days / Hours	Work Days	Total	Comment			
	· · · · ·	No	data to display							

Based on the user setting, the 'Request Site' field is pre-filled with the user worksite location. This auto-filled field is meant to reflect the site that the requisition is being created for.

*Should you need to choose other 'Request Site' locations please contact your district system administrator. The System Administrator will need to modify your user profile and turn on the 'Change Site' option.

To create a new Employee Leave Requisition, these **required** fileds must be completed: Req Name, Requested By, Leave Process Period, and Request Site (should be automatically pre-filled).

Once completed, click on the **'Save'** button at the top of the screen. This will automatically assign a number to the requisition.

File 🕴 General Ledger 🕴 Purchasin	g / AP 🛛 🕈 Warehouse 🕴 W	ork Order 🛛 🚸 Pers	onnel 🚸 Repo	rts/Query 🕂 A	dmin 😽				
Dashboard Help 01/11 15.46	FY: 2018	User: Administrato	r,System Distri	ct: Smartetools D	emo School Dist	rict Logout			
Employee Leave Requisition									
Edit Save Cancel Back to Re	q Search Notes History F	Print Attachments							
Action:		∨ Go							
Req Number:			Current Step:	Status:					
Req Name: Requested By:				Site: Information Tec riod: 2017-18 Fiscal					
Comment:									
Employee Leave Entries									
Drag a column header here to group by that colum	n								
New Leave Ent Employee Name	Leave Action Start Date	End Date	Days / Hours	Work Days	Total	Comment			

Note: 'Employee Leave Entries' can not be entered until the requisition has been saved. Additionally, once a requisition has been saved the fields can not be changed unless you are in the edit/modify mode.

ROUTING AN EMPLOYEE LEAVE REQUISITION

To route the requisition, click the 'GO' button at the top of the screen next to the 'Action' field.

Note: To route an Employee Leave Requisition there must be at least one employee leave time entry added to the requisition.

File 🚸 General Ledger 🚸 Purchasing / AP 🚸 Warehouse 🚸 Work Order 🔶 Personnel 🔶 Reports/Query 🚸 Admin 🚸	
Dashboard Help 01/11 16.01 FY: 2018 User: Administrator,System District: Smartetools Demo School District	Logout
Employee Leave Requisition	
Edit Save Cancel Back to Req Search Notes History Print Attachments	
Action: Send to Site 1 Approval	
Req Number: LV18-00008 Current Step:New Employee Leave Request Status:Open	
Req Name: January Request Site: Information Technology V	
Requested By: Mary Anne Multer Leave Process Period: 2017-18 Fiscal Year Leave Entries 🗸	
Comment:	

If all the required information has been entered, the user will receive the following message: *"Employee Leave Requisition has been successfully routed"*.

Remember! Once a requisition has been routed, no additional entries can be added to that requisition.

VIEW REQUISITION ROUTING HISTORY

To view the routing history for a specific Employee Leave Requisition, click on the requisition from the list displayed. Next click the **'History'** button. The routing history for the requisition will be displayed.

Dashboard Help 01/11 16.01 FY: 2018 User: Administrator,System District: Smartetools Demo School District Logout
Employee Leave Requisition
Edit Save Cancel Back to Req Search Notes History Print Attachments
Action: Send to Site 1 Approval
Req Number: LV18-00008 Current Step:New Employee Leave Request Status:Open
Req Name: January Request Site: Information Technology 🗸
Requested By: Mary Anne Multer Leave Process Period: 2017-18 Fiscal Year Leave Entries 🗸
Comment:

ENTER A NEW DOCUMENT NOTE

A note may be added to the requisition if needed. To add a note click on '**Notes'** button. The 'Requisition Notes' screen will open. Click on the **'New Document Note'** button. Enter a note in the **'Comment'** section and when finished click the **'Save'** button.

Employee Leave Requise Edit Save Cancel Action: Send to Site 1 Approval		Notes History Print Attachments		
Req Number: LV18-00008		Current Step:New Employee Leave Request	Status:Open	
Req Name: <mark>Janu</mark>	ary		Request Site: Information Technology	
Requested By: Mary	Anne Multer		Leave Process Period: 2017-18 Fiscal Year Leave Entries	
New Note Close No Notes Exists for Docum	Requisition Numbe			×
Note	Date	Created By		

Note: Multiple employee leave entries can be entered on a requisition. A document note is attached to a requisition not a specific employee or leave entry on that requisition.

ATTACH A DOCUMENT TO A REQUISITION

To attach a document to the requisition, click on the **'Attachments'** button. Next, click on the **'Browse...'** button and find the document on your browser to be attached to the requisition. Click on the **'Attach File'** button to attach.

Employee Leave Requisition Edit Save Cancel Back to Req Search Notes History Print Attachments Action: Send to Site 1 Approval V Go
Action: Send to Site 1 Approval V Go
Req Number: LV18-00008 Current Step:New Employee Leave Request Status:Open
Req Name: January Request Site: Information Technology 🗸
Requested By: Mary Anne Multer Leave Process Period: 2017-18 Fiscal Year Leave Entries V
Comment:
Employee Leave Entries
Drag a column header here to group by that column
-
File to Attach: Browse Attach File
File to Attach:
File Desc
Current Attachments:
View Ref # FileName File Size File Desc File Type Remove
Close

Note: Multiple employee leave entries can be entered on a requisition. An attachment is attached to a requisition not a specific employee or leave entry on that requisition.

EMPLOYEE LEAVE ENTRY

To open the 'Employee Leave Req Search' screen, click on **Personnel > Employee Leave > Employee Leave Req.**

Employ	vee Leavo	e R	eq Searc	h									
	Requisition Status: All Requisition Number:												
E	Employee Number:												
	Current Step: - None - Date Entered From: To:											~	
	Request Site: - None -												
						Sear	ch Reset						
Create Empl	oyee Leave Re	q											
					Empl	oyee	Leave Requi	sitio	ns				
Drag a colum	n header here to	grou	p by that columr	I									
	Req Name		Req Number		Leave Process Period		Current Step		Request Site		Requester Name		Date Entered
Apply		۴		۴		۴		۴		۴		۴	Ψ
Select	January		LV18-00008		2017-18 Fiscal Year I Entries	Leave	New Employee Leave Request		Information Technology		Mary Anne Multer		01/11/2018
Select	February Entri	es	LV18-00007		2017-18 Fiscal Year I Entries	Leave	New Employee Leave Request		Maintenance & Operations		Sys Admin		01/11/2018
Select	Additional Sick Time	:	LV18-00006		2017-18 Fiscal Year I Entries	Leave	New Employee Leave Request		SEC / Food Ser	vices	Ray		01/11/2018

Open the requisition and click on the **'New Leave Entry'** button.

Employee Leave Requisition							
Edit Save Cancel Back to Re	q Search Notes	History Print	Attachments				
Action: Send to Site 1 Approval			Go				
Req Number: LV18-00008	Cur	rent Step:New Er	nployee Leave Reque	st S	status:Open		
Req Name: January				Request	Site: Information Te	chnology N	/
Requested By: Mary Anne Multer				Leave Process Pe	riod: 2017-18 Fiscal	Year Leave Entries	\checkmark
Comment:							
		Employ	ee Leave Entries				
		Employ	ee Leave Entries				
Drag a column header here to group by that column	1						
New Leave Ent Employee Name	Leave Action	Start Date	End Date	Days / Hours	Work Days	Total	Comment
				,			

File 💿 General Ledger 💿 Purchasing / AP 💿 Warehouse 💿 Work Order 💿 Personnel 💿 Reports/Query 💿 Adr	nin 🕞
the Dashboard C Refresh O Help 01/15 16:24	La Administrator, System -
Employee Leave Requisition	
Edit Save Cancel Back to Req Search Notes History Print Attachments	
Action: Send to Dept. Approver	
Req Number: LV18-00008 Current Step:New Employee Leave Request Status:Open	
Req Name: January Request Site: Informati	on Technology V
Requested By: Mary Anne Multer Leave Process Period: 2017-18	Fiscal Year Leave Entries V
Comment:	
Employee Leave Entries	
Drag a column header here to group by that column	
New Leave Ent Employee Name Leave Action Start Date End Date Days / Hours Work	Days Total Comment
Employee Name:* Leave Action:*	
Start Date:*	
Days / Hours:*	
Save Leave Entry Cancel Leave Entry	

This will open the 'Employee Leave Entries' section on the screen as shown below:

Click on the dropdown arrow in the 'Employee Name' field. This will display a list of employees at the selected site. Click on the name of the desired employee. This will auto-enter the name into the 'Employee Name' field.

er Employee Number		Employee Name		Job Title	Hours Day	Employee Type	Site	
Apply	Ŷ		Ŷ	Ŷ	Ŷ	Ŷ		
BM6963211		Abanto, Elizabeth		Snack Area Supervisor	8.00	Classified	California High School	
RR8139243		Abarca, Betsy J		Teacher-10 Mo.	6.00	Certificated	Santa Fe High School	
UB2394027		Abarca, Luciano J		Teacher-10 Mo.	6.00	Certificated	Whittier High School	
GE4856250		Abdullah, Yhan		Teacher-10 Mo.	6.00	Certificated	Santa Fe High School	
US8577260		Abdullah, Ismael		Adult Teacher	8.00	Classified	WACSEP	
US8577260		Abdullah, Ismael		Spch & Lang Path Asst	8.00	Classified	WACSEP	
AG0318999	Abrego, Gena M			Instr AideSpec Ed	8.00	8.00 Classified		
KQ7656637		Acosta, Denny M		Student Employee	8.00	Student	La Serna High School	
VE5645743		Acosta Mata, Catalina		Teacher-10 Mo.	6.00	6.00 Certificated		
FA7688025		Acuna, Ledda		Sub-Food Service	8.00	Classified	Paycheck Mailed	
WF4857078		Adams, Love		Teacher-10 Mo.	6.00	Certificated	California High School	
MN2896338		Adams, Nicole		Substitute TchrRegular	8.00	Certificated	Paycheck Mailed	
KE4119436		Agena, Serina C		Wacsep Liaison Mental Hea	7.50	Certificated	WACSEP	
TS1219842		Aguayo, Ivana E		Adult Teacher Substitute	8.00	Certificated	Adult School	
DM1857558		Aguilera, Liliana		Substitute TchrRegular	8.00	Certificated	Paycheck Mailed	
e 1 of 141 (2102 Employees) Employee Name:*	3	1234567	139	140 141 🕟 Leave Action	n:*	~		
Start Date:*		~		End Date:*		\checkmark		
Days / Hours:*		<		Comment:				

Once an employee has been selected the 'Leave Action' field dropdown choices will become available. Choose the type of 'Leave Action' from the list and click on it.

Employee Leave Requisition						
Edit Save Cancel Back to Req Search No.	tes History Pri	nt Attachments]			
Action: Send to Dept. Approver		Go				
Reg Number: LV18-00008	Current Step:New	Employee Leave Req	uest St	atus:Open		
Req Name: January			Request S	ite: Information Te	chnology ~	~
Requested By: Mary Anne Multer			Leave Process Peri	od: 2017-18 Fiscal	Year Leave Entries	\sim
Comment:						
	Emplo	oyee Leave Entri	es			
Drag a column header here to group by that column		-				
New Leave Ent Employee Name Leave Action	Start Date	End Date	Days / Hours	Work Days	Total	Comment
Employee Name:* Abdull , han Teacher-1 Start Date:* Days / Hours:* Save Leave Entry Cancel Leave Entry Edit Delete Abarca, Betsy J Bereavement U		End Date: * A Comment: B C C C C C C C C C C C C C C C C C C C	None Selected - ccident Leave Usage (-) ereavement Usage (-) atastrophic Contribution (+ atastrophic Contribution (+ atastrophic Usage (-)	1.000	must be selected]
Page 1 of 1 (1 Entries) 🕜 1 🕟		C	hild Bonding (FMLA) Usage	(-)		

Enter the 'Start Date' and 'End Date' in the fields from the calendar dropdown.

The 'Days/Hours' field will be restricted to either days or hours unit entries depending on the entry in the 'Leave Action' field.

Note: If an incorrect amount is entered into the 'Days/Hours' field an error message will pop up and display the correct unit of measure.

To save the 'New Leave Entry' click the 'Save Leave Entry' button. To cancel an entry click on the 'Cancel Leave Entry' button.

Note: After clikcking the 'Save Leave Entry' button, the system will verify the leave balance available for that employee. If the employee does not have enough leave time available to use, the system will display an error message indicaing the negative balance. The user will need to change the requested time entry in order to move forward and save the entry for this employee. The district will set the guidelines and procedures for negative balances.

Click on **'New Leave Entry'** button to make another entry for this employee, search for a different employee or if completed, click on **'Save'** button.

EMPLOYEE LEAVE BALANCES AND TRANSACTIONS

To view employee leave balances and transactions go to **Personnel > Personnel > Employee** Info.

ile 🕂 General Ledger	🕈 🛛 Purchasing / AP 😽	Warehouse 🤻	9 Work Order 🚦	Personnel 🚸 Repo	orts/Query 🕂 Admin	÷
Dashboard Help	01/11 18.13 FY: 2018		User: Administrator,Sy	Personnel 🕨 🕨	Personnel Req List	ict Logout
			Quick Links	Travel Req 🛛 🕨	Personnel Requisition	
			-	Time Card 🛛 🕨 🕨	Employee Info	
	1			EmployeeLeave 🕨	N	<pre>Content</pre>
New Purch Req	Reports	Data Query	Change FY	Cha	ange Password	Help
		Pend	ling Documents			

This will open up the 'Employee Info' screen. The list will only display the employees the user has been authorized to see. 'Select' the appropriate employee to see the employee details.

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Dashboard	Help 01/11 18	.15	FY: 2018		User: Administrator,Sy	stem	District: Smartetools I	Demo	School District	out
Employe	e Info									
	Employee Name		Employee Number		Site		Employee Type		Job Title	
Apply		Ŷ		۴		۴		۴		۴
Select	Abanto, Elizabeth		M69		California High School		Classified		Snack Area Supervisor	
Select	Abarca, Betsy J		R81		Santa Fe High School		Certificated		Teacher-10 Mo.	
Select	Abarca, Luciano J		B23		Whittier High School		Certificated		Teacher-10 Mo.	

The 'Employee Details Info' screen will display basic employee details. The user can go back to the previous list by clicking on the 'Back To Employee List' button.

Back To Employee List	
Last Name: Aba First Name: Luck Middle Name: J	Employee Number: B239 Job Title: Teacher-1 Work Location: High School
Employee Details Leave Balances Job History Crede	ntials Benefit Plans Dependents/Plans Emergency Contacts
Personal Details Last Name: Aba First Name: Luci Middle Name: J	Contact Details Home Phone Number: (562) Unlisted Phone: Yes Cell Phone Number: E-mail Address: support@smartetools.com
Home Address Home Address 1: 47 Hay St Home Address 2:	Mailing Address Mail Address 1: 47 Hay St Mail Address 2:
Home City: Whittier Home State: CA Home ZipCode: 90605	Mail City: Whittier Mail State: CA Mail ZipCode: 90605

The 'Leave Balnces' tab will display leave transactions and type of leave used/requested. To view the transanction details for each leave type, click on the arrow in the first column.

Lact	Name: Aba	First Na	metur M	iddle Name: 1	Employ	oo Num	ber: B23		Job Title: Teacher-1	Work	Location:	High School
	oyee Details	Leave Ba			Credentials		enefit Plans	1		Emergency Conta		
Emp			Junces Jun P	istory	credendais							
	Fiscal Year	Туре						Earned	Accr		Used	Balance
*	2018	Sick Leave				0.00	6	0.00	175.00	-115.0		
	Leave Dat	e Req #	Request Type	Earned	Accrued	Used	Balance	Comme	nts	Posted Date		
	07/01/201	17	Sick Leave	0.00	60.00	0.0	0 60.00	Current	Year Accrual	08/09/2017		
				0.00	60.00	0.0	0 60.00					
>	2018	Personal Neces	ssity					0.00	4	2.00	0.00	42.0
>	2018	Personal Busin	ess					0.00	1	0.00	0.00	0.0
>	2018	Compelling Per	rsonal Need					0.00	24	4.00	0.00	24.0
>	2018	Bereavement						0.00		0.00	0.00	0.0
>	2018	Accident Leave	9					0.00		0.00	0.00	0.0
>	2018	Differential Pay	/					0.00		0.00	0.00	0.0
>	2018	FMLA						0.00		0.00	0.00	0.0
>	2018	Child Bonding	(FMLA)					0.00		0.00	0.00	0.0
>	2018	Leave of Abser	nce					0.00		0.00	0.00	0.0
>	2018	Workers Comp						0.00		0.00	0.00	0.0
>	2018	Military Leave						0.00		0.00	0.00	0.0
>	2018	Catastrophic L	93V9					0.00		0.00	0.00	0.00

Note: Users will need to have access rights assigned to them in the user profile in order to be able to view the Leave Balances, Job History, Credentials, Benefit Plans, Dependents/Plans, Emergency Contacts tabs.

Employee Det	ails Info				
Back To Employee L	ist				
Last Name: Aba	First Name: Luc	Middle Name: J Employee Number:	B23 Job Title: Teache	r-1 Work Location:	: High School
Employee Details	Leave Balances	Job History Credentials Benef	t Plans Dependents/Plans	Emergency Contacts	

GLOSSARY OF TERMS

Accrued: The totals in this field will be the employee leave balance that an employee accrues for the current fiscal year or on a monthly basis.

Balance: The totals in this field are amounts from Earned, Accrued and Used fields.

Comment: Enter a comment if needed for this employee (optional).

Earned: The totals in this field will be the employee leave balances that have rolled over from previous years.

Employee Leave Req: Choose the appropriate requisition from the dropdown menu, if a requisition has not been processed it will display in this list.

Employee Leave Type: Choose the approriate leave action from the dropdown list of established leave action choices.

Job Title: Will autopopulate from SmarteHR.

Hours/Day: The unit of measurement for hours or days will autopopulate from SmarteHR.

Leave Type: The type of leave is the bank that holds all the leave actions used by the district.

Start Date & End Date: Choose from the calendar the dates that pertain to the leave action.

Used: The totals in this field are from the Employee Leave Entries requested by the employee.