



SmarteHR Employee Leave

User Guide

Revised 01/12/2018

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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 requisitions. Other functions available within the module include: adding notes, attaching files, and tracking requisition 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.

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

Quick Links							
							
New Purch Req	Reports	Data Query	Change FY	Change 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	Administrator, System	Information Technology
LV18-00007	Employee Leave Requisition	New - Not Routed	New Employee Leave Request	01/11/18 02:13 PM	52m	Administrator, System	Information Technology
LV18-00005	Employee Leave Requisition	Pending Approval	Site 1 Approval	01/10/18 04:52 PM	22h 13m	Administrator, System	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	Administrator, System	Information Technology

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.

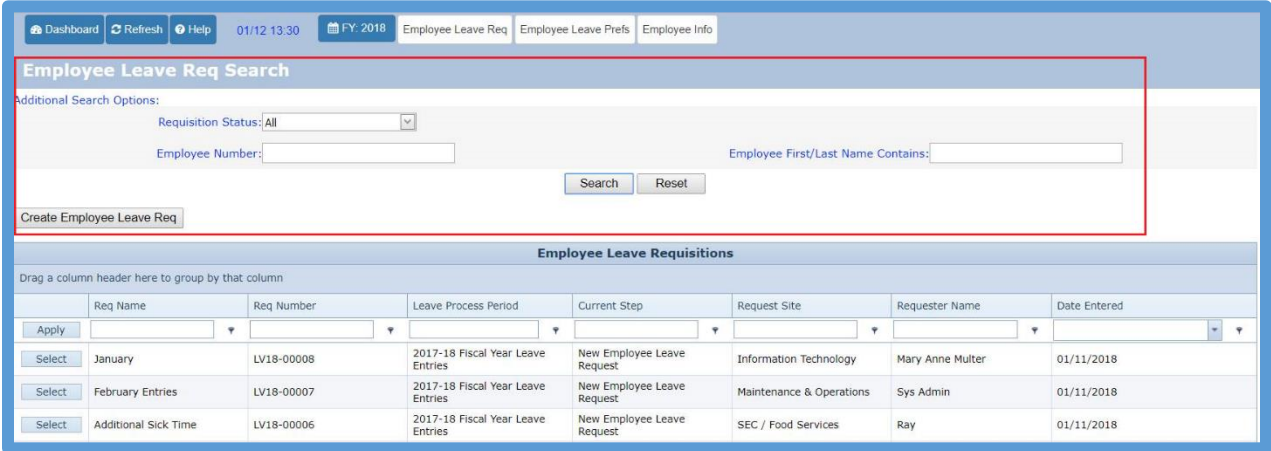
Pending Documents							
Document #	Document Type	Status	Current Document Step	Date Arrived	Time at Current Step	Created By	Site/Dept
LV18-00008	Employee Leave Requisition	New - Not Routed	New Employee Leave Request	01/11/18 02:14 PM	51m	Administrator, System	Information Technology
LV18-00007	Employee Leave Requisition	New - Not Routed	New Employee Leave Request	01/11/18 02:13 PM	52m	Administrator, System	Information Technology
LV18-00005	Employee Leave Requisition	Pending Approval	Site 1 Approval	01/10/18 04:52 PM	22h 13m	Administrator, System	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	Administrator, System	Information Technology

SEARCH FOR AN EXISTING EMPLOYEE LEAVE REQUISITION

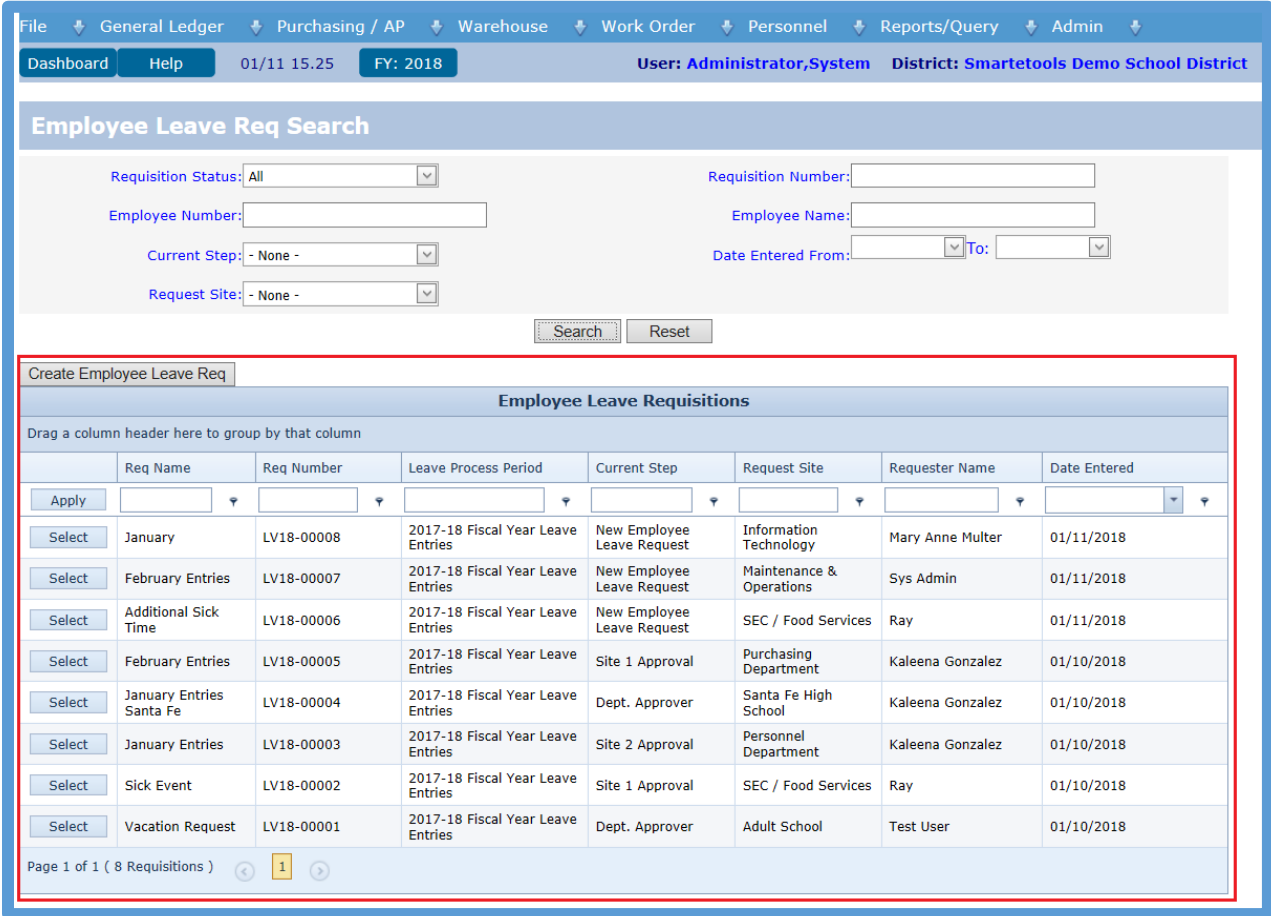
There are two ways to search for an existing requisition. Go to **Personnel > Employee Leave >** and click on **Employee Leave Req.** This will open the ‘Employee Leave Req Search’ screen.

The screenshot shows the SmarteHR application interface. At the top, there is a navigation bar with menu items: File, General Ledger, Purchasing / AP, Warehouse, Work Order, Personnel, Reports/Query, and Admin. Below this is a dashboard area with 'Quick Links' for New Purch Req, Reports, Data Query, Change FY, Change Leave Process Period, and Help. A dropdown menu is open under 'Personnel', showing options for Personnel, Travel Req, Time Card, Employee Leave, and Employee Leave Req (which is highlighted with a red box). Below the navigation is the 'Pending Documents' table, which is identical to the one shown in the previous image.

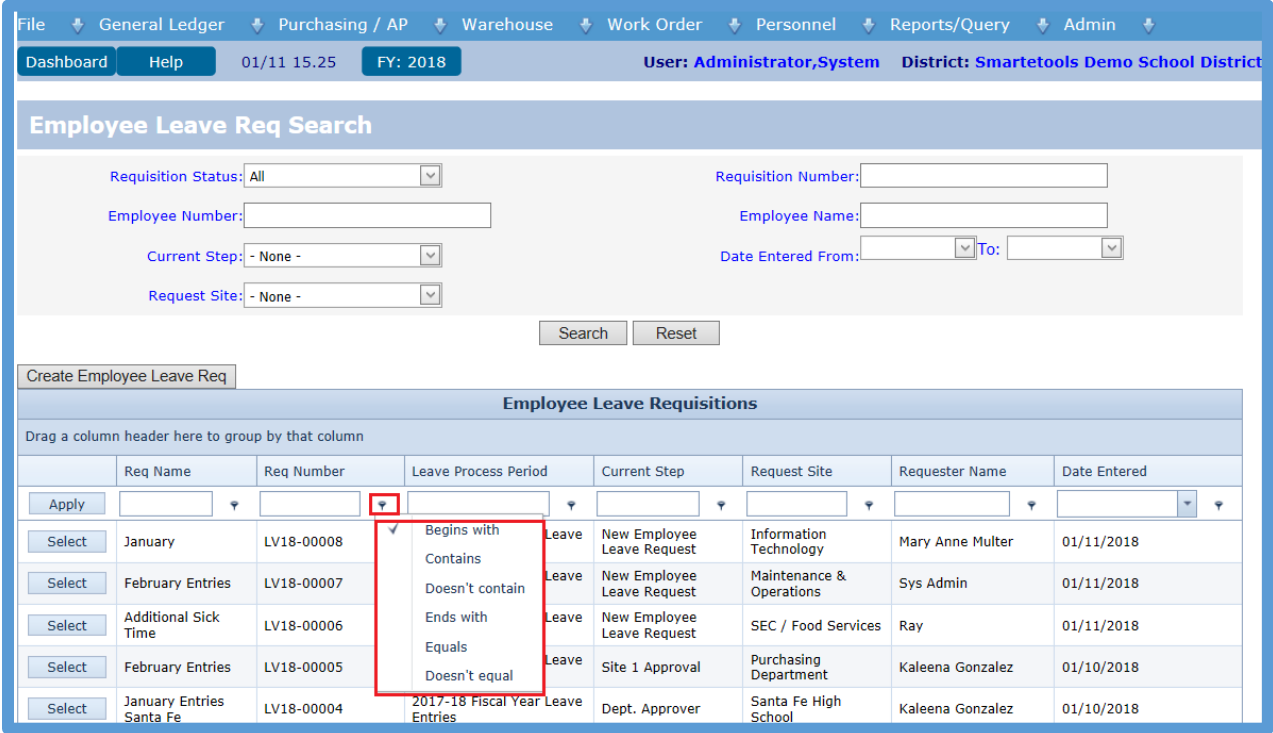
The 'Employee Leave Req Search' screen:



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



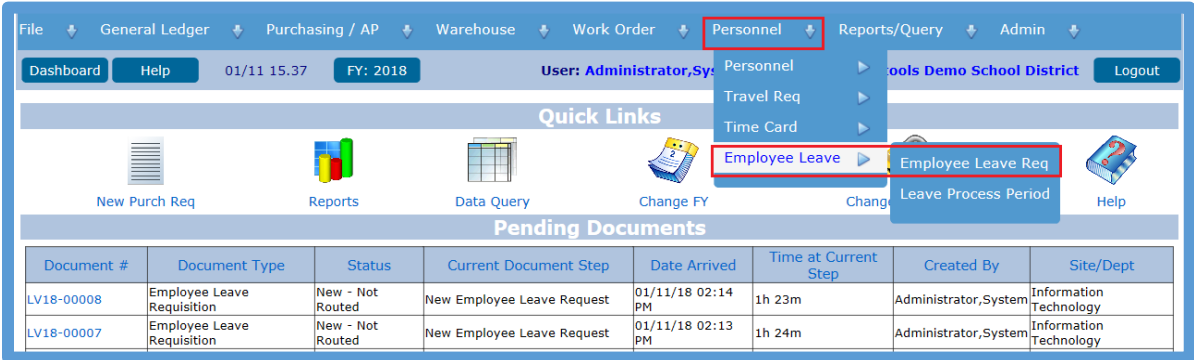
The bottom area allows the user to search for a requisition by the following filters: Req Name, Req Number, Leave Process Period, Current Step, Request Site, Requester Name, and Date Entered.



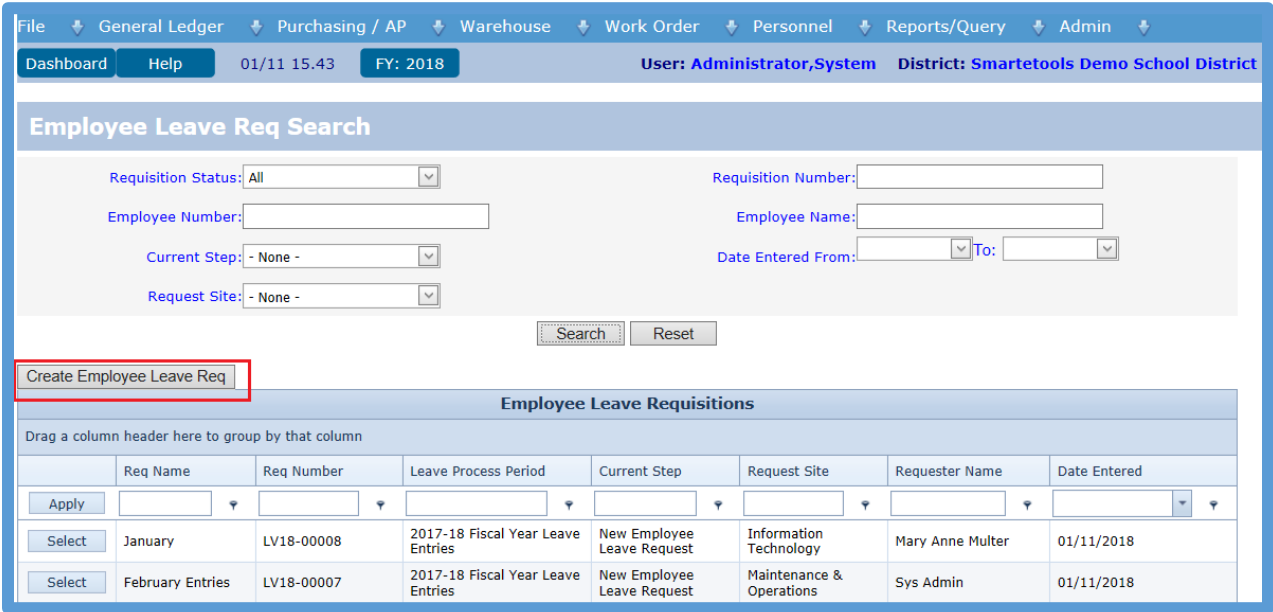
The user can also narrow the search by using the filters in the dropdown for each column. The available filters include: Begins with, Contains, Doesn't contain, Ends with, Equals, and Doesn't equal.

CREATE AN EMPLOYEE LEAVE REQUISITION

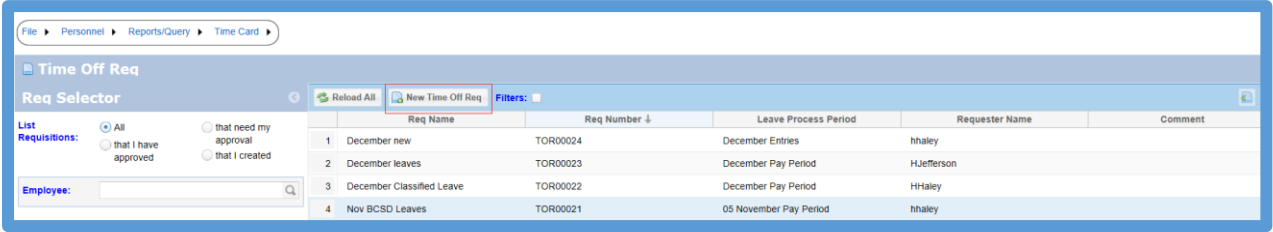
To create an Employee Leave Requisition, go to **Personnel > Employee Leave > Employee Leave Req.**



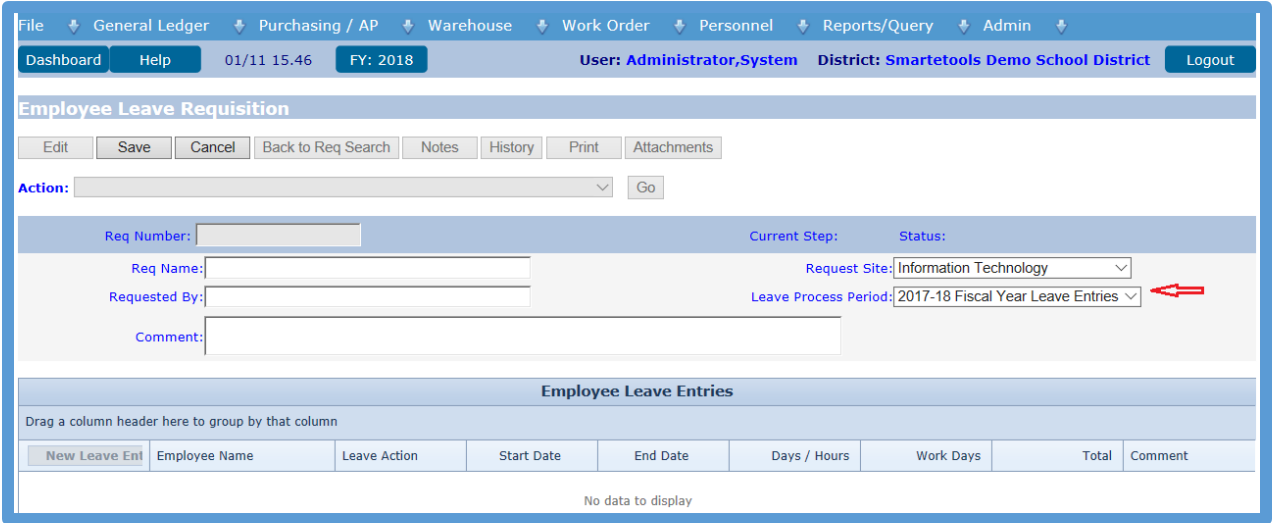
The Employee Leave Req screen will open. This screen will display a list of requisitions previously created by the user as well as list those that are pending approval by the user.



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



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



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** fields 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.

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.

The screenshot shows the 'Employee Leave Requisition' form in a web application. At the top, there is a navigation bar with menu items like 'File', 'General Ledger', 'Purchasing / AP', 'Warehouse', 'Work Order', 'Personnel', 'Reports/Query', and 'Admin'. Below this is a header with 'Dashboard', 'Help', '01/11 16.01', 'FY: 2018', 'User: Administrator, System', 'District: Smartetools Demo School District', and 'Logout'. The main title is 'Employee Leave Requisition'. Below the title are buttons for 'Edit', 'Save', 'Cancel', 'Back to Req Search', 'Notes', 'History', 'Print', and 'Attachments'. The 'Action' dropdown menu is highlighted with a red box and contains the text 'Send to Site 1 Approval'. Below the action menu, there is a 'Go' button. The form fields include: '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', and a 'Comment:' field.

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.

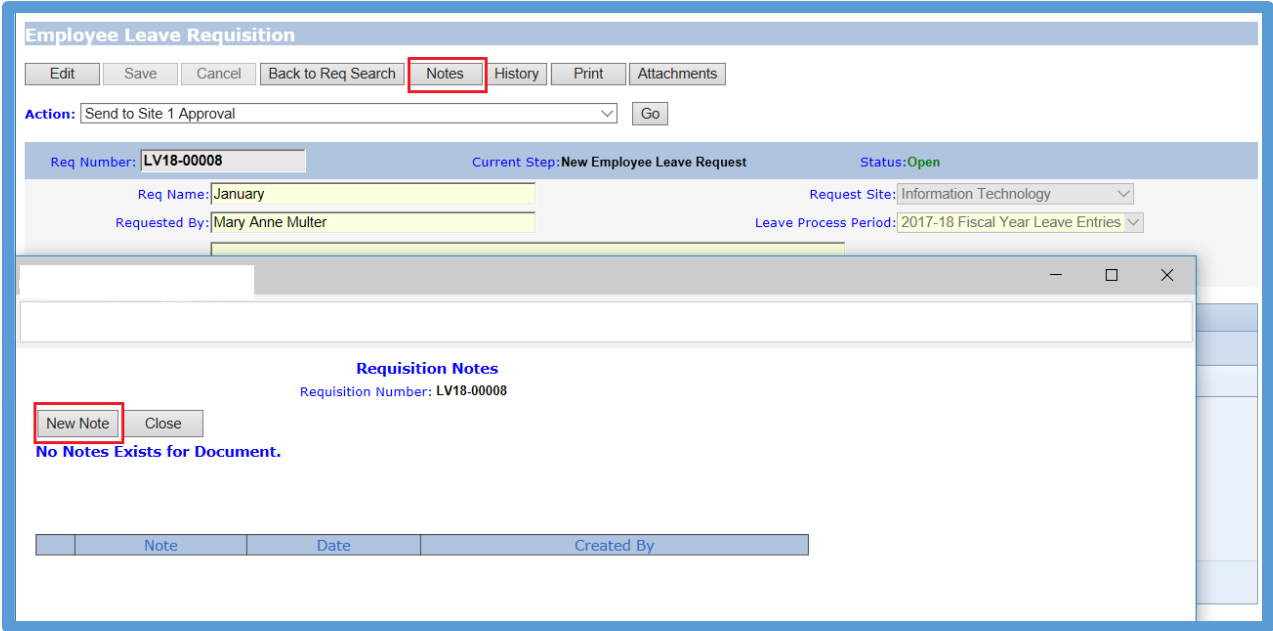
VIEW REQUISITION ROUTING HISTORY

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.

This screenshot is identical to the one above, showing the 'Employee Leave Requisition' form. In this view, the 'History' button in the top navigation bar is highlighted with a red box. All other elements, including the 'Action' dropdown menu, remain the same as in the previous screenshot.

ENTER A NEW DOCUMENT NOTE

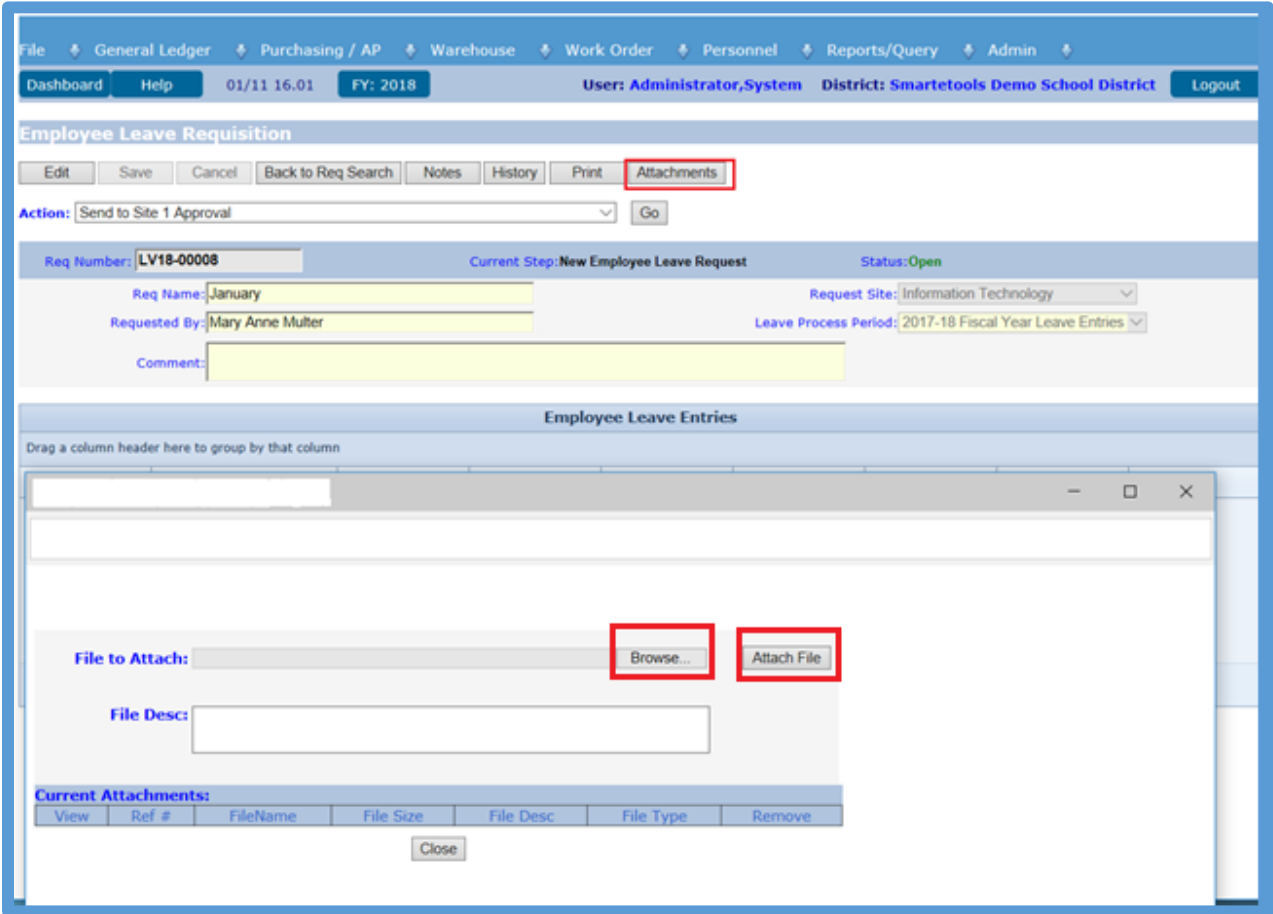
A note may be added to the requisition if needed. To add a note click on 'Notes' button. The 'Requisition Notes' screen will open. Click on the 'New Document Note' button. Enter a note in the 'Comment' section and when finished click the 'Save' button.



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.



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.**

Employee Leave Req Search

Requisition Status: All Requisition Number:
Employee Number: Employee Name:
Current Step: - None - Date Entered From: To:
Request Site: - None -

Employee Leave Requisitions

Drag a column header here to group by that column

	Req Name	Req Number	Leave Process Period	Current Step	Request Site	Requester Name	Date Entered
<input type="button" value="Apply"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Select"/>	January	LV18-00008	2017-18 Fiscal Year Leave Entries	New Employee Leave Request	Information Technology	Mary Anne Multer	01/11/2018
<input type="button" value="Select"/>	February Entries	LV18-00007	2017-18 Fiscal Year Leave Entries	New Employee Leave Request	Maintenance & Operations	Sys Admin	01/11/2018
<input type="button" value="Select"/>	Additional Sick Time	LV18-00006	2017-18 Fiscal Year Leave Entries	New Employee Leave Request	SEC / Food Services	Ray	01/11/2018

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

Employee Leave Requisition

Action:

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

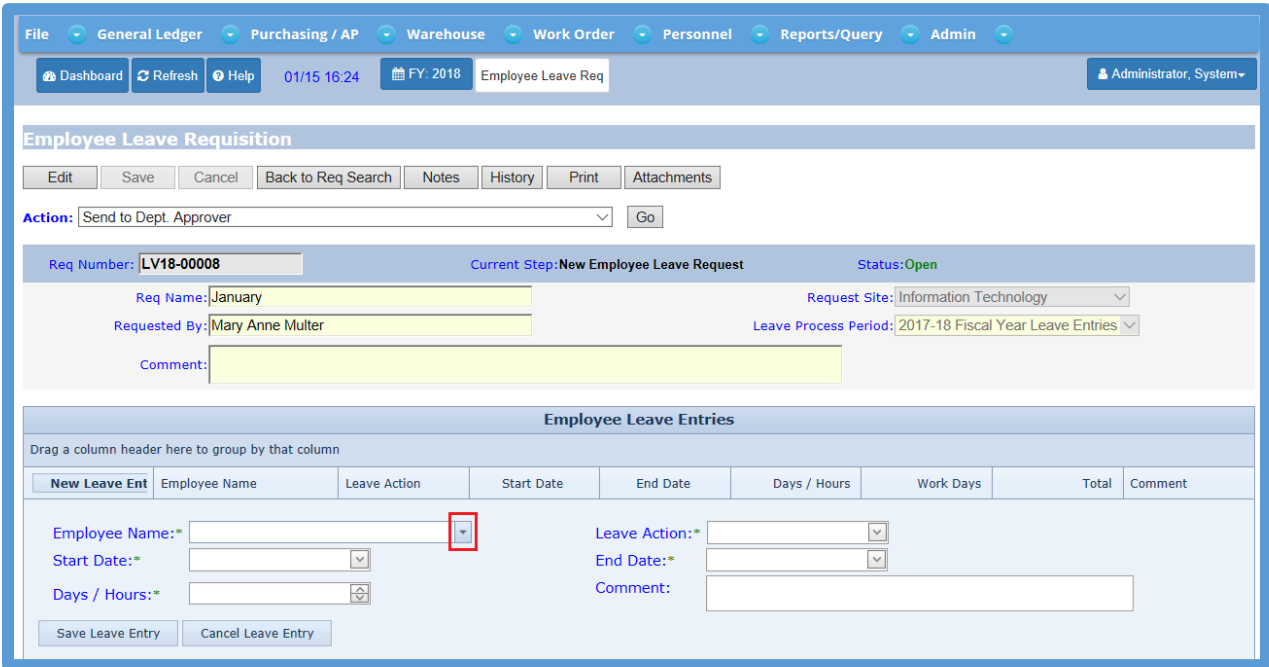
Comment:

Employee Leave Entries

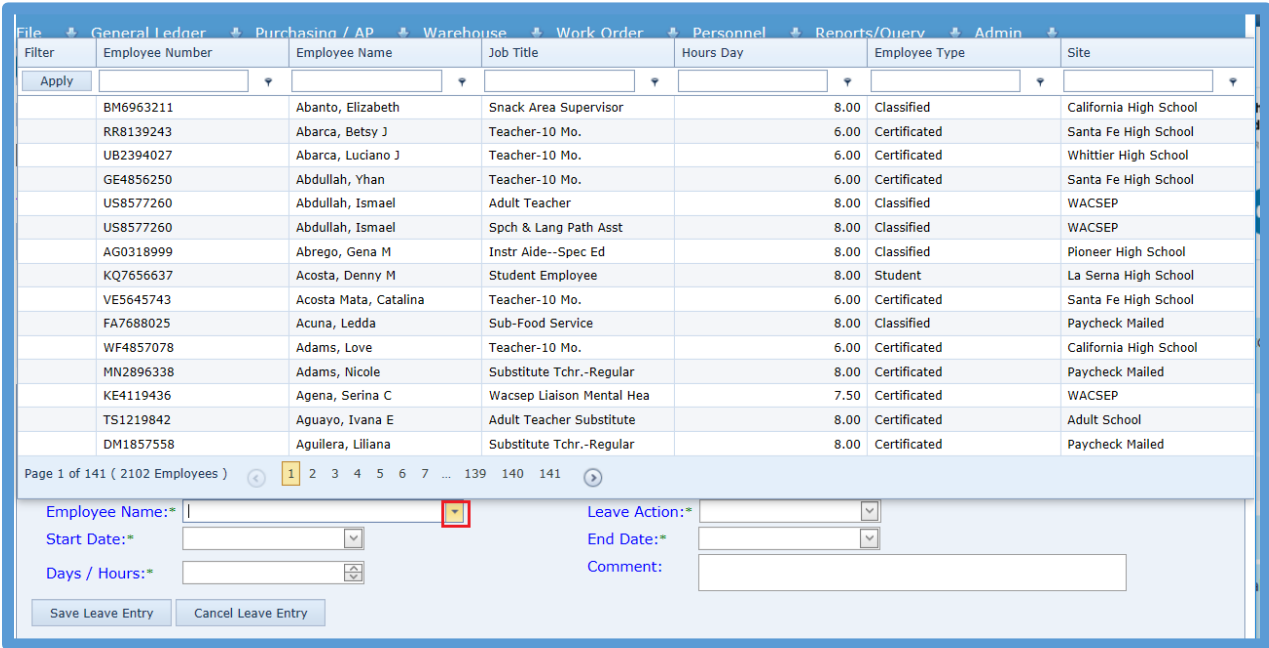
Drag a column header here to group by that column

<input type="button" value="New Leave Ent"/>	Employee Name	Leave Action	Start Date	End Date	Days / Hours	Work Days	Total	Comment
--	---------------	--------------	------------	----------	--------------	-----------	-------	---------

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.



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 Notes History Print Attachments

Action: Send to Dept. Approver 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

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
	Abdull , han Teacher-10	Leave Action: * None Selected *						
	Abarca, Betsy J	Bereavement Usa...	02/05/2018	02/05/2018		1.000	1.000	

Page 1 of 1 (1 Entries)

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.

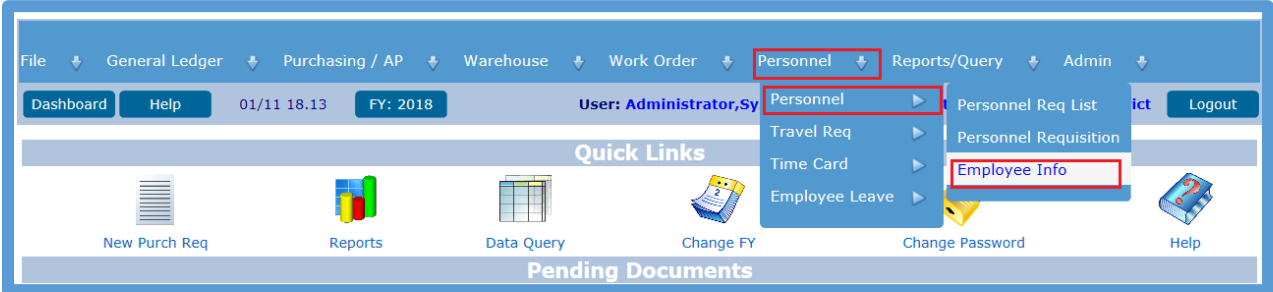
To save the 'New Leave Entry' click the 'Save Leave Entry' button. To cancel an entry click on the 'Cancel Leave Entry' button.

Note: After clicking 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 indicating 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.

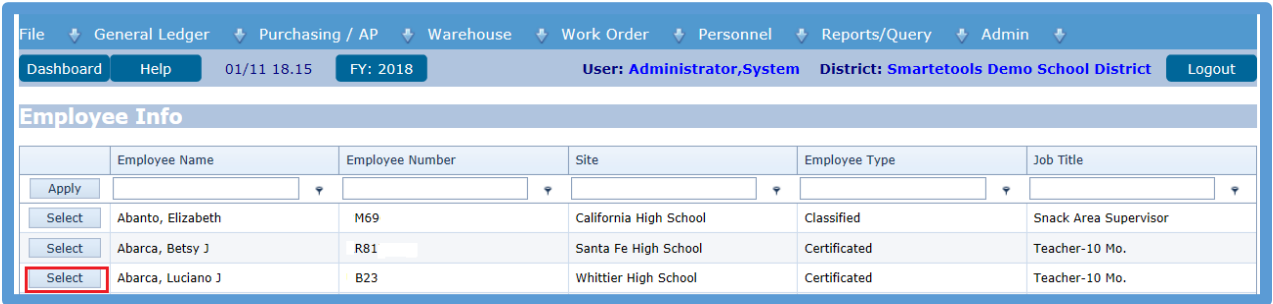
Click on 'New Leave Entry' button to make another entry for this employee, search for a different employee or if completed, click on 'Save' button.

EMPLOYEE LEAVE BALANCES AND TRANSACTIONS

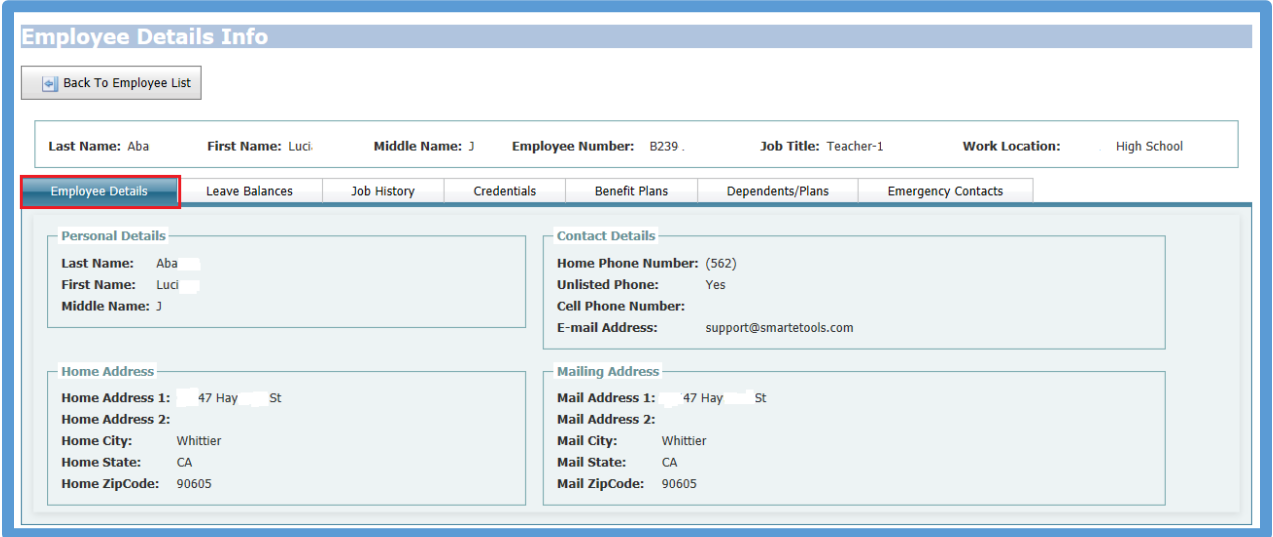
To view employee leave balances and transactions go to **Personnel > Personnel > Employee Info**.



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.



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.



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

Employee Details Info

[Back To Employee List](#)

Last Name: Aba First Name: Luc Middle Name: J Employee Number: IB23 Job Title: Teacher-1 Work Location: High School

Employee Details **Leave Balances** Job History Credentials Benefit Plans Dependents/Plans Emergency Contacts

Fiscal Year	Type	Earned	Accrued	Used	Balance					
▼ 2018	Sick Leave	0.00	60.00	175.00	-115.00					
		Leave Date	Req #	Request Type	Earned	Accrued	Used	Balance	Comments	Posted Date
		07/01/2017		Sick Leave	0.00	60.00	0.00	60.00	Current Year Accrual	08/09/2017
					0.00	60.00	0.00	60.00		
>	2018	Personal Necessity			0.00	42.00	0.00	42.00		
>	2018	Personal Business			0.00	0.00	0.00	0.00		
>	2018	Compelling Personal Need			0.00	24.00	0.00	24.00		
>	2018	Bereavement			0.00	0.00	0.00	0.00		
>	2018	Accident Leave			0.00	0.00	0.00	0.00		
>	2018	Differential Pay			0.00	0.00	0.00	0.00		
>	2018	FMLA			0.00	0.00	0.00	0.00		
>	2018	Child Bonding (FMLA)			0.00	0.00	0.00	0.00		
>	2018	Leave of Absence			0.00	0.00	0.00	0.00		
>	2018	Workers Comp			0.00	0.00	0.00	0.00		
>	2018	Military Leave			0.00	0.00	0.00	0.00		
>	2018	Catastrophic Leave			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 Details Info

[Back To Employee List](#)

Last Name: Aba First Name: Luc Middle Name: J Employee Number: IB23 Job Title: Teacher-1 Work Location: High School

Employee Details **Leave Balances** Job History Credentials Benefit 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 appropriate 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.