

Employee Leave Process

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Introduction

The goal of CIMS leaves is to reduce/eliminate the paperwork, increase the timeliness of approvals, automate reconciliation with Sub/Absence entry for payroll, and better inform all people that need to be informed of the leave.

This software module impacts many groups of users:

- a) Employees and Employee Connect – Input leave requests online, review leave requests and confirm whether approval has been granted.
- b) School Admin and Clerical (Admin Connect) – Review leave requests for those that you are in charge of (determined by location and/or by leave type definition) and verify them to pass process to H/R approval and completion. Within the admin connect dashboard also be able to review leave requests en mass and check on particular information before potentially verifying the request.
- c) Leave Approver (Admin Connect) – Review requests Pending Approval and either approve or deny. Note that the approver has immediate access to history of leaves, absence balances and details, employee work history, etc. to better assist them in approving with better knowledge
- d) H/R (EIS.316) – Review approved leaves and provide completion based on approvers' approval plus other notes attached.

In addition to the initial leave and approval process, other departments are affected

- e) Payroll – Run a Leave compare report between SUB records and approved leaves to qualify that all appropriate absence code(s) have a matching and approved leave form. This should largely reduce time/effort to manually compare all of the leave forms

Each leave type controls what information is requested to make the leave entry as specific as possible to the inputter. In addition to standard leave request information (who, what, when, why) online leaves accommodate:

- Reminding the person if they work at multiple locations to duplicate the leave request for his additional location(s).
- Preventing over maximums of certain leave types. For example, if a leave type has a restriction as to how many can be out that day on a leave type – the system will prevent further leave requests once maximum amount has been approved/reached.
- Preventing leave requests for invalid dates if the leave definition has been setup to not allow certain blocked dates.
- Documents - The leave person can attach documentation if necessary (medical report, conference brochure, etc) and that information will remain online with the request
- Conference and expense information and confirmation of expenses for leaves that have expenses attached (meals, transportation, per diem, sub costs paid by school)

The Leave request process consists of the following stages:

- **'O'**pen Request / Pending Recommendation – Leave has been requested and is awaiting school recommendation
- **'N'**ot recommended by School - Leave request has been denied by the location administrator
- **'P'**ending Approval – School has recommended the leave and it awaits next level of approval
- **'A'**pproved – Approval has been given by someone on the approval list for that leave type and the record has also been finalized/completed by H/R
- **'I'** – Approved by not completed/finalized by H/R
- **'X'** – Approval has been denied by someone on the approval list for that leave type

Leave Type Setup

Leave Types (similar to absence codes) must be setup in order for someone from Employee Connect to be able to select a leave. A leave type drives what information should be asked and what group of employees may select it.

Naming leave types and describing them are critical as it is the first thing a person who is requesting a leave will see. Align them with your absence codes and consider making different leave types for your different groups of employees where it makes sense and policies differ between the groups (eg: support and teaching – create a SICKS and SICKT rather than just a leave SICK).

The Definition consists of several screens:

SCREEN1: Define the Leave Type

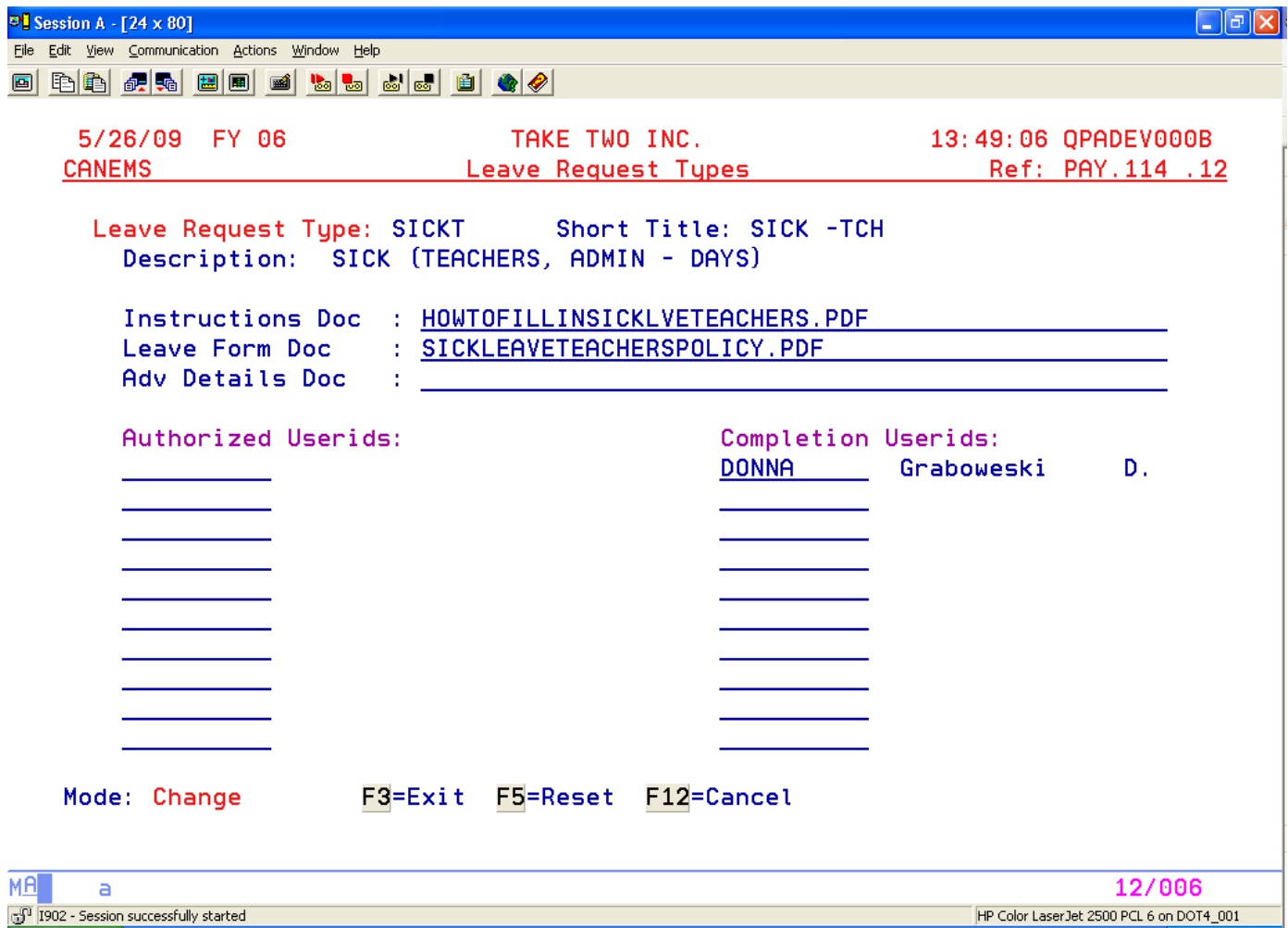
Per Employee: You can restrict the maximum

Per Leave Type: If the leave type has a maximum number of people that can be on this leave type on a given day then this field will prevent further leave requests. The system checks the start date for any leave that has been verified or approved and counts them up to get a total number.

Sub Information Required: If this is turned to ‘Y’ the leave form will include additional information to input whether a Sub is required and for what date range (could be different from the leave dates).

Expense Details: If this leave has associated employee expenses, the request Y so that the employee can estimate/detail all of the expected expenses. You can control what expense types are available to the employee for this leave type and also have default expense amounts (eg: Per Diem and amount) when appropriate.

SCREEN2 – Define Approvers and attach documents



Instructions Doc: Each leave type can drive a different ‘How To Document’. Indicate the document name here and then email the document to IT to put onto the web server so that it is accessible online.

Leave Form Doc: Separate from an instructions document you can include a policies like document that talks about leave rules and regulations for this particular leave type.

Advance Details Doc: If this leave has associated expenses, use this document to explain what expenses are acceptable, maximum amounts, and any advance details.

Authorized Userids: The School/Location is automatically involved in the leave process and does not have to be described here as an authorized ID. The first level of every leave is 'Recommendation' by the location meaning once a leave request is saved – it will remain as a 'Open' leave request and stay at the location dashboard waiting for that location administrator to 'Recommend' the leave for approval before being passed to approving levels. Once verified – the system will look to the approval list and process the leave to those desktop Admin Connect dashboards for them to view, approve, and deny.

Completion Userids: Once the approver has approved the leave request it's status will then make that request ready for final checking and completion (usually H/R clerical). Any of the Id's on the list will pull up approved requests and handle any approver details as well as input a completed date

SCREEN3 - Associate Leave Type to Absence Codes

```
5/26/09  FY 06                TAKE TWO INC.                15:12:19  QPADEV000B
CANEMS                Leave Request Types                Ref: PAY.114L.11
Leave Request Type: SICKT  SICK (TEACHERS, ADMIN - DAYS)
ALLOWABLE ABSENCE CODES AND REASONS
CMD      AbsCod Reason Description
BEGIN
0001.000 SICKT                SICK GENERAL
0002.000 SICKT  CMP          COMPASSIONATE LEAVE
0003.000 SICKT  CMPSUB       COMPASSIONATE LVE WITH SUB COS
         -> SICKT  EXT          SICK - EXTENDED MEDICAL

4.000  Absence Code SICKT Reason Code EXT

F3=Exit  F4=Index  F5=Reset  F12=Cancel  Cancel? N
```

A leave may relate to several absence code and or reasons. Use this screen to indicate what absences could relate to this leave type. This is used for the employee to select from and then again at time of Payroll to Leave compare to verify that an existing Employee absence matches an existing leave.

SCREEN4 – Indicate excluded dates for this Leave Type

```
Session A - [24 x 80]
File Edit View Communication Actions Window Help
5/26/09 FY 06 TAKE TWO INC. 15:14:27 QPADEV000B
CANEMS Leave Request Types Ref: PAY.114E.11
Leave Request Type: SICKT SICK (TEACHERS, ADMIN - DAYS)
LEAVE TYPE DATES TO BE EXCLUDED
CMD Date
BEGIN 0/00/00
0001.000 6/28/06 Wednesday

2.000 Date 0/00/00

F3=Exit F4=Index F5=Reset F12=Cancel Cancel? N

MR a 20/024
I902 - Session successfully started HP Color LaserJet 2500 PCL 6 on DOT4_001
```

Some leave types are date sensitive, ie: cannot be taken on particular dates or months. Use this screen in those situations to block an employee even being able to request a leave for particular date(s). The system will check the start date requested on the leave and as long as it does not hit this exclusion list or fall outside the date range indicated on screen 1– the date will be valid.

Employee Connect – Input and Manage Leave Request

Access employee leaves from the <Absence> tab. A history of all your leaves and status appear. There is a button to 'Add new Request'. From the list of all previously entered leaves you can select them to update (if not already approved) or to check on status and notes about the leave made by approvers and/or H/R.

Employee Connect - Leave Requests - Microsoft Internet Explorer

Address: http://192.168.0.30/employeeconnect/EmployeeLeave.aspx

TAKE TWO Employee Connect Powered by CIMS

EC-0016 Leave request notes [Contact Payroll](#) [Contact Human Resources](#)

Leave Requests Employee# 1191 Last Name AFINOGENOV First CHERYL

Add Leave Type: * No Leave Type Selected * **Add**

Select	Status	Location	Requested Date	Leave Date	Days	Hours	Comment
1							

Employee Connect - Add Leave Requests - Microsoft Internet Explorer

Address: http://192.168.0.30/employeeconnect/EmployeeAddLeave.aspx

TAKE TWO Employee Connect Powered by CIMS

Leave Instructions EC-0016 Leave request notes [Contact Payroll](#) [Contact Human Resources](#)

Employee# 1191 Last Name AFINOGENOV First CHERYL Date Entered 05/21/2009

Leave# 0 Leave Type PRODS PROD TEACHER - SPECIAL APPROVAL Sub-Type NEW REQUEST

Save

Job TEACHER * Location SPECTRUM MIDDLE SCHOOL * First Date Absent * Clear 05/29/2009 [Fill]

Short Description Special Behavioural seminar * Last Date Absent * Clear 06/01/2009 [Fill]

Date/Time Comment Part day on Friday and all Day Monday *

Absence Reason PROFESSIONAL DEVELOPMENT * Number of Days 1.5 * Clear 06/01/2009 [Fill]

Rationale/Reason Having trouble in the classroom dealing with ADD students and I need help to understand how to control. *

Attachment Description (Mandatory if including attachment)

WebSite Conference Start Date Clear [Fill]

Conference City Prow/State Country CAN Clear [Fill]

Substitute Comment Substitute Required All Days OR Specific Dates Clear 06/01/2009 [Fill] Clear [Fill] Clear [Fill]

Expense Type	Description	Total Expense Estimate	Quantity	Cost	Currency
... No Expense Type ...		0.00			CAN
... No Expense Type ...					CAN
... No Expense Type ...					CAN

Leave request information presented depends on the leave request definition. An employee must fill in all fields that are '*'end (have a red asterisk following them). At minimum, you must:

- Select a Leave Sub-Type (If applicable)
- Confirm what job this leave is against (Payroll Job Code)
- Confirm location for leave. SPECIAL NOTE: If you work at multiple locations that will mean a separate leave per location. Once you have completed the first leave – system will indicate that you are a multi-location person and it will offer to 'duplicate' leave to another location.
- Short Description – describe what the leave is for
- Date/Time Comment – indicate whole day or part day(s). Identify range or comment if leave extends over a regular day.
- Date Range – Select <Fill> to bring up a calendar to click on both start date and end date of the leave
- Confirm absence code and reason (same absence/reason codes available in your Sub Call system)
- Rationale – Provide details of the leave and why you need to take it

Optional Information:

- Include attachment – If you have a medical document or a seminar brochure or anything electronic (scanned) that you want to include with this leave input an attachment description. When you save your leave additional options will come up to allow you to browse and attach a .puff document to your leave request

Other Information that may be requested depending on the leave type

- Conference Information: If this leave is PD oriented – it may require you to input information about the conference (location, city, conference name, dates of conference) as well as provide you the opportunity to attach the conference brochure or agenda to the request to help the approver appreciate what the conference is about.
- Whether a Sub is required or not: Entering Sub information is for leave reporting only (Date range for sub which may be different than leave range, all or part days, comment). In addition to the leave request – the employee must call-in for a Sub as per regular district policy.
- Expense Estimate: Indicate by type all of the estimate expenses (type, description, amount, currency). If the school is paying for the Sub then a negative expense should be used to assist H/R in knowing to charge the location for Sub.

Once <Save> is clicked, a message will appear confirming that all information is complete – Leave added. Make sure to look for the completion message so that you are confident that your leave has submitted properly. In addition, there is a <Print> button to print a copy of your leave request.

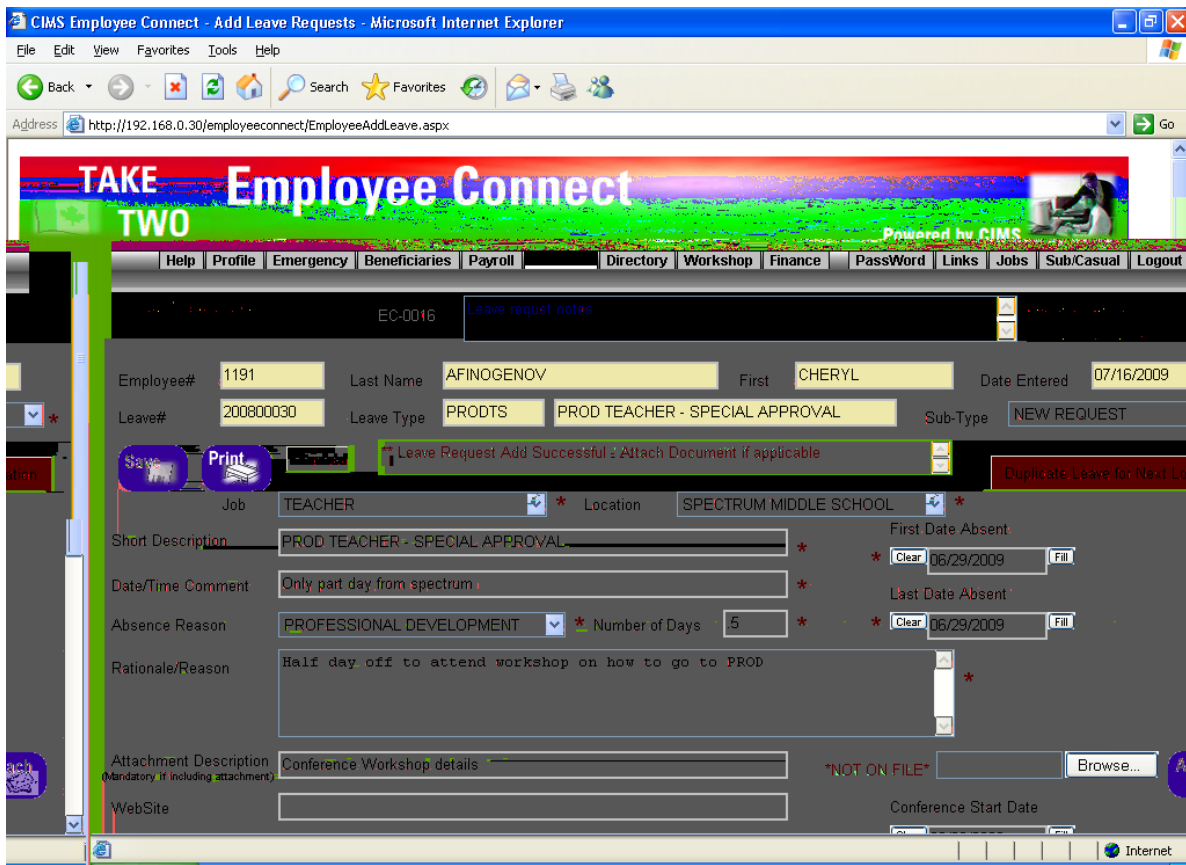
At this state your leave is 'Pending Recommendation' meaning it will now appear on your school/location administrator's connect dashboard waiting for their recommendation before it goes electronically to the next level of approval. At this state an employee can still edit the request or delete it.

Special Consideration – Employees that work at multiple Locations requiring a Leave PER Location

When an employee requests a leave and chooses to <Save> the program goes out to check in the history records (PRO.300) and if the employee has active assignments at multiple locations – the employee is prompted as to whether he wants to duplicate this leave for another location.

This is important, ie: commonly employees do not fill out separate leaves per location when really it is necessary in order for both buildings to know and approve the leave.

Once the employee successfully <Saves>:



NOTE: A Duplicate Leave for Next Location appears if the employee is working at multiple locations. If you will be on leave from the other location as well it is important to:

- Modify the location
- Modify the date/comment and comments (If applicable)
- Choose to <Save> and a second leave will get generated

If the Leave applies to just the single location – choose <Finished> to return to the main screen and record only the single leave.

CMS Admin Connect - Employee Leave - Microsoft Internet Explorer

Address: http://192.168.0.30/Adminconnect/EmployeeLeave.aspx

TAKE Admin Connect TWO

Powered by CIMS

Return to List | Profile | Emergency | Absences | Experience | Evaluations | AppliedTo | Skills | Folder

EC-0016 Leave request notes [Contact Payroll](#) [Contact Human Resources](#)

Employee# 1191 Last Name AFINOGENOV First CHERYL

Leave Requests

Select	Requested Date	Leave Date	Days Hours	Comment
Select Pending Recommendation 200800028	SICK (TEACHERS, ADMIN - DAYS)	EXTENSION OF EXISTING LEAVE	SPECTRUM MIDDLE SCHOOL	06/12/2009 06/16/2009 1.00 Days SICK (TEACHERS, ADMIN - DAYS)
Select Pending Recommendation 200800029	SICK (TEACHERS, ADMIN - DAYS)	EXTENSION OF EXISTING LEAVE	JOE LOUIS ELEMENTARY	06/12/2009 06/16/2009 1.00 Days SICK (TEACHERS, ADMIN - DAYS)
Select Pending Recommendation 200800027	PROD TEACHER - SPECIAL APPROVAL	NEW REQUEST	JOE LOUIS ELEMENTARY	05/21/2009 05/28/2009 0.50 Days Special Behavioural seminar
Select Pending Approval 200800025	PROFESSIONAL DEVELOPMENT - EXISTING TEACHER	EXTENSION OF EXISTING LEAVE	WACHOVIA SECONDARY SCHOOL	05/12/2009 05/19/2009 0.50 Days PROFESSIONAL DEVELOPMENT - TEACHER

Those with Pending Recommendation need to be dealt with by you

CMS Admin Connect - Change Leave Request - Microsoft Internet Explorer

Address: http://192.168.0.30/Adminconnect/EmployeeChgLeave.aspx

Employee# 1191 Last Name AFINOGENOV CHERYL

Leave# 200800028 Leave Type SICK SICK (TEACHERS, ADMIN - DAYS)

Sub-Type EXTENSION OF EXISTING LEAVE * Date Entered 06/12/2009

Job TEACHER Location SPECTRUM MIDDLE SCHOOL

Short Description SICK (TEACHERS, ADMIN - DAYS) *

Date/Time Comment Just half day - gone to Mystery Lake

Absence Reason COMPASSIONATE LVE WITH SUB C * First Date Absent * Clear 06/16/2009 Fill

Number of Days 1.00 * Last Date Absent * Clear 06/16/2009 Fill

Rationale/Reason Scheduling assistance needed at RD Parker *

Attachment Reference (mandatory if including attachment) *NOT ON FILE* Attach

WebSite

Substitute Comment Just need a Sub in the afternoon

Substitute Required All Days OR Specific Dates Clear 06/16/2009 Fill Clear Fill Clear Fill

Max Per Employee 0 Max Per Day 0

School Authorize School Deny Final Approval Final Deny Completed

School Administration may:

- Edit any of the details
- Add an attachment if necessary or view attachments if employee included in the leave request (eg: Conference brochure, medical note)
- Update Substitute Teacher information
- <Print> the request *Optional

In order to send this request to H/R or committee for approval Admin must:

- 'check' either the School Authorize or School Deny
- Add additional comment if necessary
- <Save> the changes to submit this request for final approval

When you select to <SAVE> the system will indicate that Recommendation has been accepted OR it will highlight what information is in error or needs completion. Look for this message to ensure your leave recommendation is successful.

Use the FINISHED button to complete this request and return you to the employee's leave requests. Notice that the status of a completed request will now change to 'Pending Approval'.

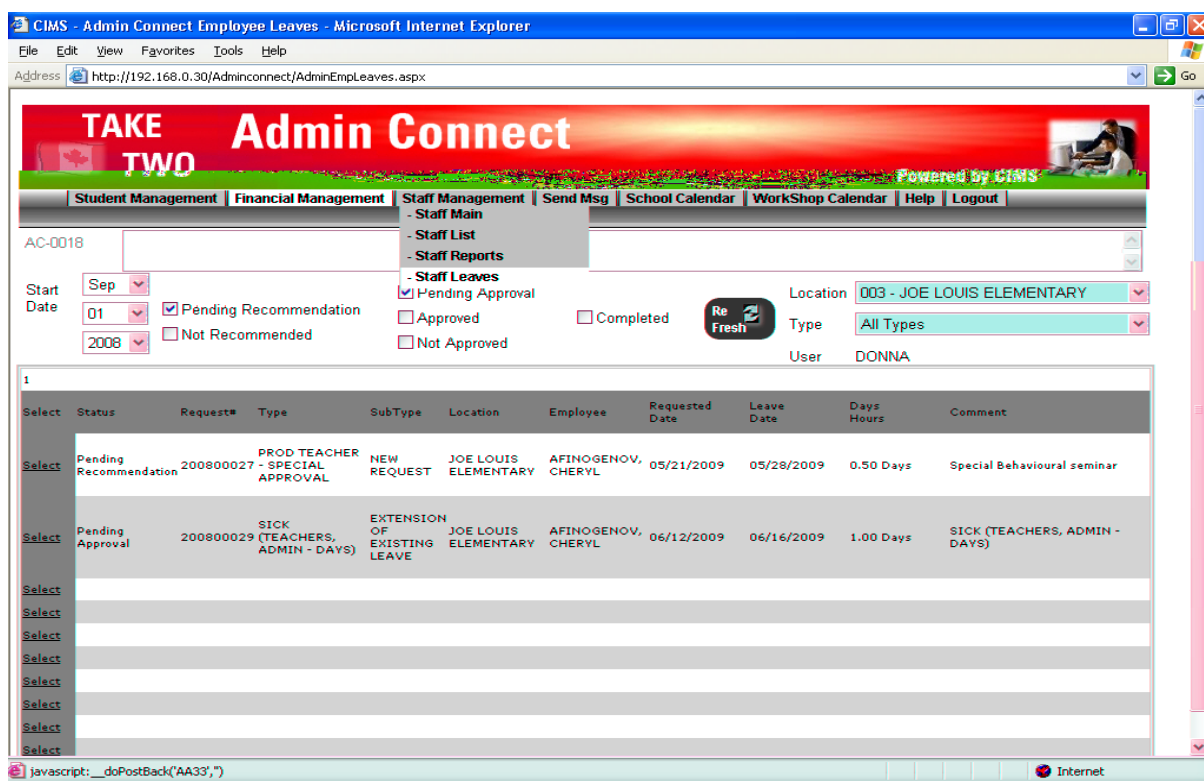
Keep in mind that as you are reviewing an employee's leave request you see history of previous leave requests AND you also have access to employee absence banks and details. These should assist in your approval process.

Pending Approval

As indicated in previous sections all leaves go through the following process:

- a) Use Employee Connect to input the leave request
- b) The location attached to that leave request must review and recommend the leave within their Admin Connect. At this point the leave request is in a Pending Approval state.

When each leave request type is defined the person defining the rules of the leave also indicate what people(s) must approve the leave. The system will then present all 'Pending Approval Leaves' within those approvers' Admin Connect for them to review and then approve/deny.



Use the <Filter> Options at the top of the screen to view any/all leave requests regardless of status or year. In order to ensure that you see all of the Pending Approval Items select:

- All Locations
- All Types
- Reasonable start date (school year start)
- Checkbox on 'Pending Approval' items

In order to view and approve any request choose to <Select>

Use the Top <tabs> - absences, experience (PRO.300 history), Profile in order to view pertinent information about the person taking the leave.

Max Per employee shows how many of this same leave type this employee has taken

Max per Day shows how many other employees have this same request already approved for this same day

Use the <Final Approval> or <Final Deny> in order to approve the request and potentially provide additional comments. <SAVE> must be selected and the final Successful message shown in order to ensure successful approval.

Note that you have to slide down the screen to see additional information like Substitute Required or expenses (if applicable).

Approved Leave Requests

All of the recommending and approval for leaves occurs from Admin Connect. Once final approval has been granted – H/R has one more opportunity to Complete the Request.

By definition – completion means that no further changes can be done to the leave. In terms of paper flow and processes it is at completion time that notifications can/should be sent to stakeholders.

Completion is done within CIMS with option EIS.316:

The image displays two screenshots of a terminal window titled "Session A - [24 x 80]".

Top Screenshot: Shows the main menu of the "Employee Leave Request Maintenance" system. The header includes the date "7/16/09", fiscal year "FY 06", company name "TAKE TWO INC.", and a reference number "Ref: EIS.316 .01". The menu options are:

- I Add
- Print: 1=Leave Profile
- Change 2=Leave Profile + Email Employee
- Delete
- Lookup From : donna@taketwoinc.com
- Print
- Index
- End

 The "Index" option is expanded to show:

- 1 = Leave Requests by Employee
- 2 = Leave Requests by Request#
- 3 = Leave Requests by Type
- 4 = Employees by Name

Bottom Screenshot: Shows a detailed view of a leave request for "AFINOGENOV, CHERYL H.". The header includes the date "6/12/09", fiscal year "FY 06", company name "TAKE TWO INC.", and a reference number "Ref: EIS.316 .12". The request details are:

- Employee: AFINOGENOV, CHERYL H.
- Leave Type: SICKT Sub-Type: EXTEND
- Request# 1191
- Date Entered: 6/12/09

 A section titled "SUB INFORMATION REQUIRED" contains:

- Absence Code: SICKT Reason: CMPSUB # Absent DAYS 1.0000
- Abs Comment: Just need a Sub in the afternoon
- SUB Dates: 6/16/09 0/00/00 0/00/00

 Further down, there are fields for approval and completion:

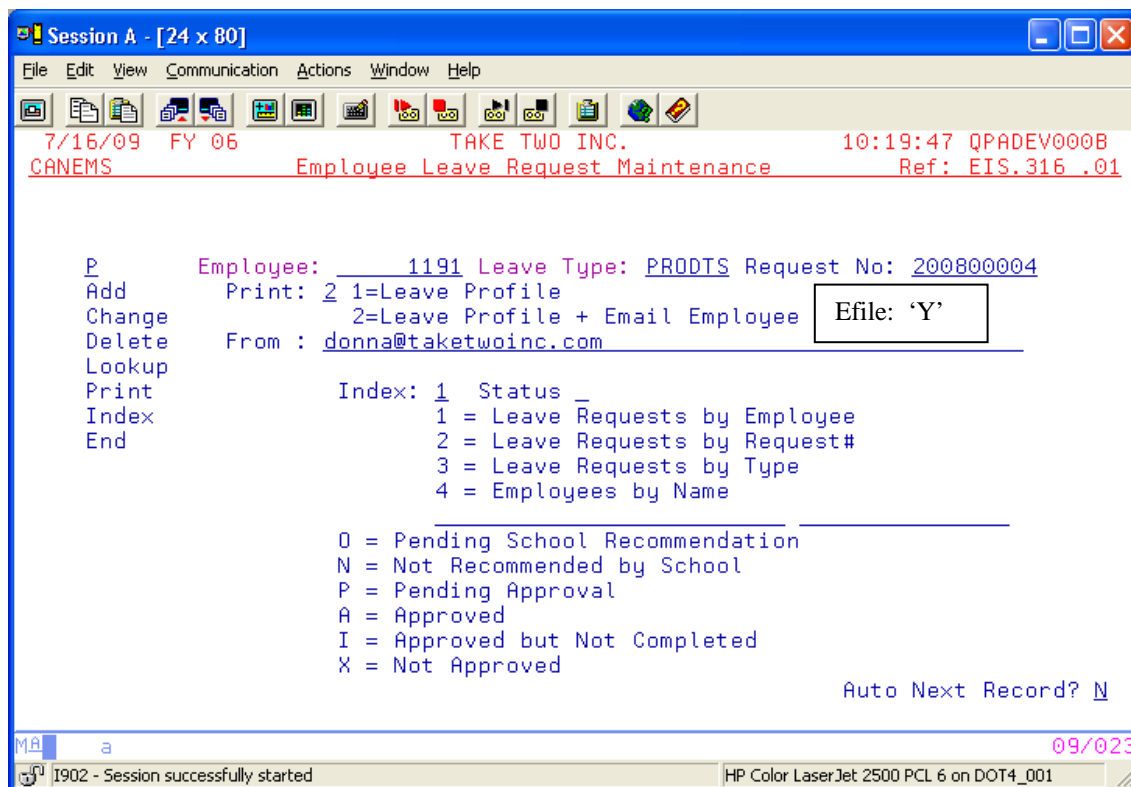
- School Authorized/Denied? a by DONNA on 6/12/09
- Comment: Note Sub only required Part Time, School Not Paying
- Final Approval/Denial? a by DONNA on 6/12/09
- Comment: Sick is fine, but charge Sub to my Budget.
- Completed? Y by _____ on 0/00/00 Type SCHLSU
- Comment: _____

 At the bottom, it shows "Mode: Change" and function key shortcuts: F3=Exit, F5=Reset, F12=Cancel.

Use the 'I'ndex option to display all of the Leaves that are status 'I' – approved but not yet completed. These are the leaves that you need to complete.

- Identify the Leave Request to be Complete - Y
- Identify if there are any additional instructions with this leave (defined by type) – SCHLPAY for sub for instance
- Input any final comments about the leave

Once you have completed the leave – you can automatically email the employee. This will send an email to them and include a print of the leave containing all of the details and approval notes. At the same time, there is an option to Efile ‘Y’ which will take the leave request Profile and store a copy to the electronic employee file.



Leave Approval – How to inform Stakeholders

Once the leave has been approved and/or completed the process has been complete. In a paper process copies of the approved leave would go to various departments and people. With the online process, the paper is reduced:

- No copy to school. Administrator can view status of leaves by selecting the Leaves tab
- No copy to employee. Employee can sign into employee connect at any time and check on the status of the leave
- No copy to payroll. Payroll can run EIS.xxx to compare Sub records with leave requests to reconcile the leave report with records within SUB.
- (Optional): Upon completion there is an option both Efile a copy of the Leave AND email the employee

Leave Reporting

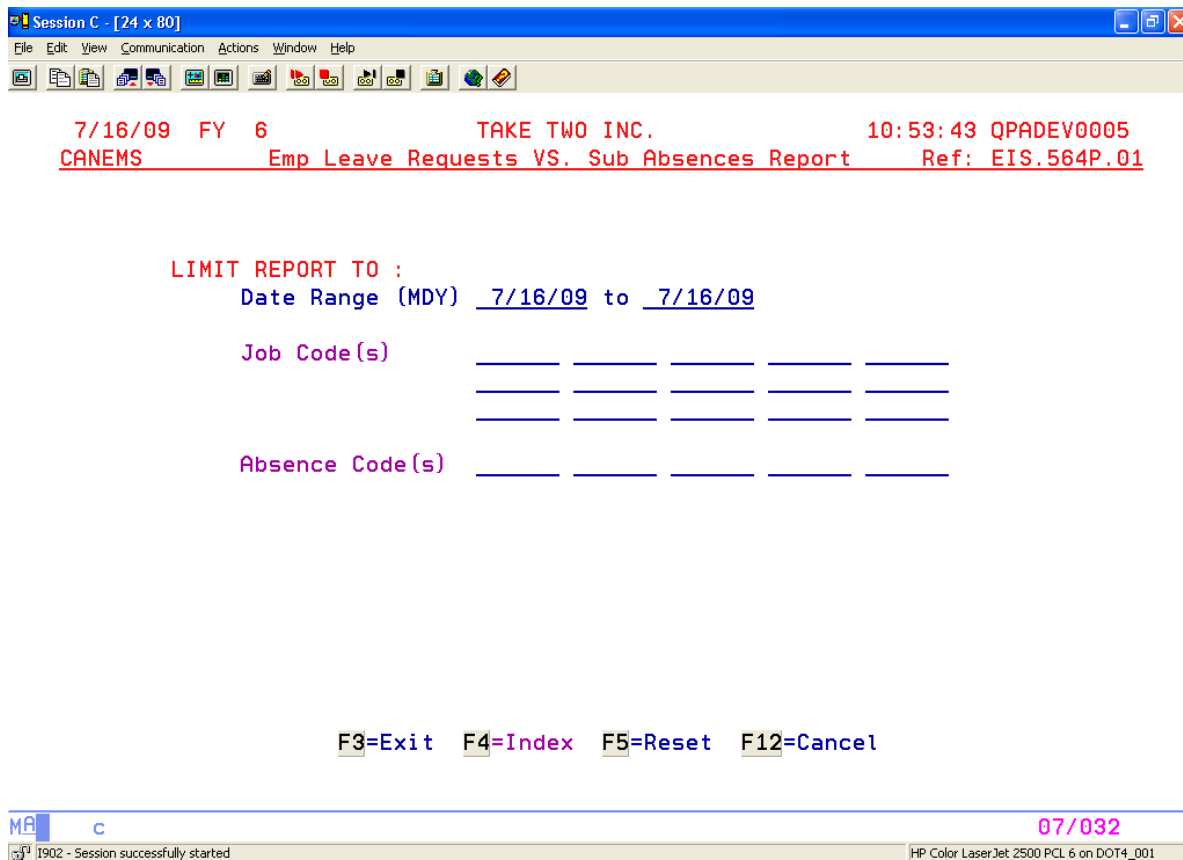
Schools and district office will use EIS.538 to report on leaves. There are a variety of selects (by type, date range, status, location, employee) to accommodate needs.

A monthly calendar view of leaves is also available using EIS.595. This will help to visually see volume of leaves in summary per day and in a calendar view.

Payroll Compare – Leave Requests to Sub Records

The purpose of this report is to eliminate manually checking each leave form to each sub record. The report will compare both ways:

- check leave requests and ensure there is a Sub entry for the same date(s) and absence code
- check Sub records against leaves and confirm that a leave exists for appropriate sub records



- Select an appropriate date range of records to check
- Select which codes require leaves. There will be sub records for things that do not require leaves and you want to make sure that these are not included in your compare else your error report will be LARGE.