NEOGOV

Processing Time Off Requests using the Self Service Dashboard

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Preface

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Overview

There are two options to enter time off in Self Service.

- **Submit a time off request** – Used when planning future time off. For example: requesting eight hours off for Vacation or PTO.
- **Enter time off as a timesheet line** – Occasionally used for immediate transactions. For example: entering two hours of sick time at the start of a workday. Time off requests automatically create the timesheet lines; direct entry on the timesheet is not required.

After submitting a time off request, managers, or other defined approvers, can view the request as a task on the Self Service **Dashboard** and approve or deny the request.

This document describes the basic workflow for processing time off requests.

Submit Time Off Requests

Self Service Dashboard

To submit a request using the **My Time Off** tab, do the following.

1. In the **Dashboard**, select **Time & Attendance** > **My Time Off**.
2. Click **Request Time Off**. The **Request Time Off** dialog appears.

For faster access, click **Request Time Off** under **Quick Actions** on the **Dashboard**.

Request Time Off

Cancel | Submit

CURRENT BALANCE	PLANNED TIME OFF
15.36 hours	0.00 hours

*Time Code

PTO TKN ⌄

Leave Type

PTO

*Start Date

01/17/2023 🗓

*End Date

01/17/2023 🗓

Scheduled Hours

9

Requested Hours

8 ⬍

Start Time

End Time

Reason

⌄

Comments

Attachments

⬆ Add Files

3. Select the desired time off from the **Time Code** list. NEOGOV populates the **Leave Type** field based on your selection.

*Time Code	Leave Type
PTO TKN ⌄	PTO

4. Select the **Start Date** and **End Date** for the request. For a one-day or partial day request, enter the same date in both fields. For a multi-day request, enter different dates.

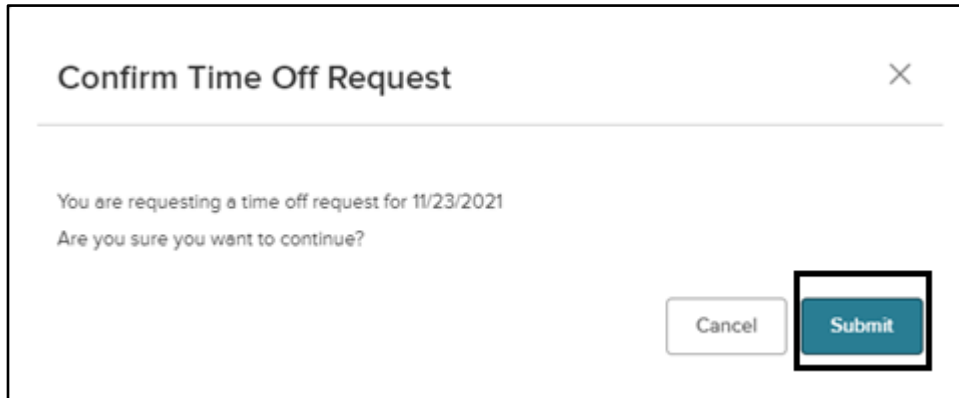| *Start Date	*End Date
01/17/2023 📅	01/17/2023 📅
Scheduled Hours	Requested Hours
9	8

After entering the dates, the **Scheduled Hours** field displays the hours for the date range, based on the employee's assigned work calendar.

5. For a partial day request, enter a different value for **Requested Hours**. The **Start Time** and **End Time** fields are active.

Scheduled Hours	Requested Hours
9	**5** 4
Start Time **6**	End Time
12:00PM	04:00PM

6. If required, enter the desired **Start Time** and **End Time**.

7. Select a **Reason** for this request; this may be optional or required depending on the plan setup.

8. Optionally, add **Comments** to further explain the request.
9. Optionally, click **Add Files** to upload supporting documents.
10. Click **Submit**. The **Confirm Time Off Request** dialog appears.
11. Click **Submit**. A dialog appears indicating that the request is processing.

Confirm Time Off Request   ✕

You are requesting a time off request for 11/23/2021
Are you sure you want to continue?

       [Cancel]   **[Submit]**

The request appears in the list, and the **Status** changes as the manager approves or denies the request. Requests appear on the **Upcoming Time Off** or **History** tabs, depending on if the requested dates are before or after the current date.

Upcoming Time Off	History		
Planned Date(s)	**Type**	**Hours**	**Status**
06/30/2023 - 06/30/2023	PTO	2.00	Awaiting Approval

First   Previous   **1**   Next   Last   [15 ▾] items per page   Showing 1-1 of 1 items

Timesheet Lines

Managers and employees can enter leave as timesheet lines using the Self Service **Dashboard** (admins use the **Enter Employee Timesheets** screen). Use this process for entering or adjusting the hours taken.

Managers and Employees

> ℹ️ For managers, use the **My Team's Timesheet** tab, then select the desired employee.

1. Go to **Dashboard** > **Time & Attendance** > **My Timesheet** tab.

2. If entering a new line, click **+** on the desired line. A new line appears underneath. If adjusting values, select the desired line.

Time & Attendance

Overview | **My Timesheet** | My Team's Timesheets | My Time Off | My Team's Time Off

| | Merell Q Chantal
Office Supervisor - Police | Open | | | | Submit |

Period: June 25 - July 8 ⌄   72.00 REG HRS   72.00 **Total Hours**

Date	* Assignment	* Time Code	Cost Center	Start Time	End Time	Amount	Total Hours	
Sunday 06/25								+
Monday 06/26	PRIMARY	REG HRS		08:00 AM	04:00 PM	8 hrs	**8.00 hours**	+ ▭ 🗑

3. Click the **Time Code** field and select the desired time code for the time off.

Monday 06/26	PRIMARY	REG HRS		08:00 AM	04:00 PM	8 hrs			🏳	🗑
	PRIMARY	REG HRS	Cost Center			8.00 hours	+	🏳	🗑	

			Code	Description		
		JUR HRS	Jury Duty Hours			
		REG HRS	Regular Hours - worked daily			
		2ND SHIFT	2nd Shift Hours			
		OVT HRS	Overtime Hours			
		PTO TKN	PTO Taken Hours			
		VAC TKN	Vacation Taken Hours			
		PER TKN	Personal Taken Hours			
		COMP EARN	Comp Time Earned			
		DOUBLE OT	Double Overtime			

Tuesday 06/27	PRIMARY				04:00 PM	8 hrs	0.00 hours	+	🏳	🗑
Wednesday 06/28	PRIMARY				04:00 PM	8 hrs	0.00 hours	+	🏳	🗑
Thursday 06/29	PRIMARY				04:00 PM	8 hrs	0.00 hours	+	🏳	🗑
Friday 06/30	PRIMARY				04:00 PM	8 hrs	0.00 hours	+	🏳	🗑
Saturday 07/01								+		
Sunday 07/02								+		

Monday 06/26	PRIMARY	REG HRS
	PRIMARY	VAC TKN

4. Enter the **Amount** to indicate the number of hours being taken off.

5. (Optional) Enter the **Start Time** and **End Time** only if it is a partial day time off and not for the full workday.

Monday 06/26	PRIMARY	REG HRS		08:00 AM	04:00 PM	8 hrs			🏳	🗑
	PRIMARY	VAC TKN	Cost Center	08:00	10:00	2	10.00 hours	+	🏳	🗑

6. Click out of the line to save the change.

> 💡 To enter a note explaining the time off, click the Comments icon.

7. At the end of the timesheet period click **Submit**. The **Submit Timesheet for Approval** dialog appears.

8. Select the approval statement, then click **Submit**. A dialog appears indicating the status.

The timesheet updates and displays the requested time off.

| MC	**Merell Q Chantal** Office Supervisor - Police	Submitted		Submit
Period: June 25 - July 8 ⌄		80.00 REG HRS	2.00 VAC TKN	82.00 Total Hours

💡	Clicking **Submit** locks the timesheet from further editing while it is in the approval process.

Admins

1. From **Time & Attendance Dashboard**, select **Timesheets** > **Manage Timesheets**. The **Employee Timesheets** screen appears. Select an active employee.
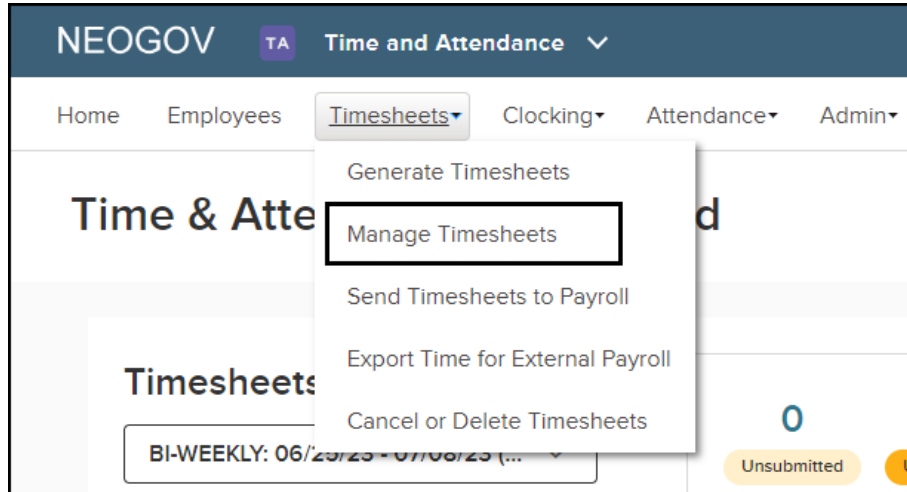
2. Click the name of the desired employee to open their timesheet.

3. Click **+** on the desired line.

Date	* Assignment	* Time Code	Cost Center	Start Time	End Time	Amount	Total Hours			
Sunday 04/02								+		
Monday 04/03	PRIMARY	REG HRS		08:00 AM	04:00 PM	8.00 hrs	8.00 hours	+	▢	🗑

4. Select the **Time Code** to reflect the type of time off.

Monday 04/03	PRIMARY	REG HRS		08:00 AM	0

🔍 PRIMARY	🔍 REG HRS	🔍 Cost Center		

Time Code	Description
JUR HRS	Jury Duty Hours
REG HRS	Regular Hours - worked daily
2ND SHIFT	2nd Shift Hours
OVT HRS	Overtime Hours
PTO TKN	PTO Taken Hours
VAC TKN	Vacation Taken Hours
PER TKN	Personal Taken Hours
COMP EARN	Comp Time Earned

Tuesday 04/04	PRIMARY
Wednesday 04/05	PRIMARY
Thursday 04/06	PRIMARY
Friday 04/07	PRIMARY
Saturday 04/08	
Sunday 04/09	

5. and the **Amount** for the number of hours.
6. If tracking specific hours for a partial-day request, enter the **Start Time** and **End Time**.

Monday 04/03	PRIMARY	REG HRS		08:00 AM	02:00 PM	6.00 hrs		▢	🗑
	🔍 PRIMARY	🔍 VAC TKN	🔍 Cost Center	08:00	10:00	2.00	8.00 hours	+ ▢ 🗑

7. Click out of the line to save the change.

Monday 04/03	PRIMARY	REG HRS	08:00 AM	02:00 PM	6.00 hrs			▢	🗑
	PRIMARY	VAC TKN	08:00 AM	10:00 AM	2.00 hrs	8.00 hours	+	▢	🗑

Cancel Time Off Requests

An employee can cancel a submitted request. For example, if their plans change and will not take the day off. The employee can cancel the request up to the point of approval; once approved, the employee cannot cancel the request and must contact the admin to remove it.

To cancel a request in the Self Service **Dashboard,** do the following.

1. Go to **Time & Attendance** > **My Time Off** > **Upcoming Time Off** tab and select the desired request. The **Request Time Off** dialog appears.

Upcoming Time Off	History			
Planned Date(s)		**Type**	**Hours**	**Status**
09/10/2023 - 09/16/2023		VACATION	45.00	Awaiting Approval
08/30/2023 - 08/30/2023		PERSONAL	9.00	Awaiting Approval
08/08/2023 - 08/08/2023		PTO	3.00	Awaiting Approval

First   Previous   **1**   Next   Last   [15 ▾] items per page   Showing 1-3 of 3 items

2. Click **Cancel Request**. The **Cancel Time Off Request** dialog appears.

Request Time Off	Close

CURRENT BALANCE	PLANNED TIME OFF
15.36 hours	4.00 hours

Time Code
PTO TKN

Leave Type
PTO

Start Date
01/17/2023

End Date
01/17/2023

Scheduled Hours
9

Requested Hours
4

Start Time
12:00 PM

End Time
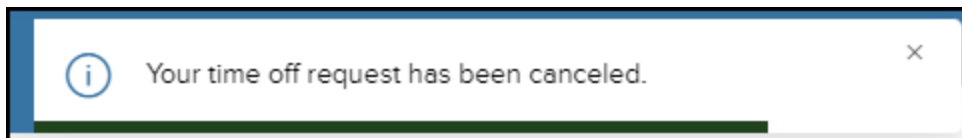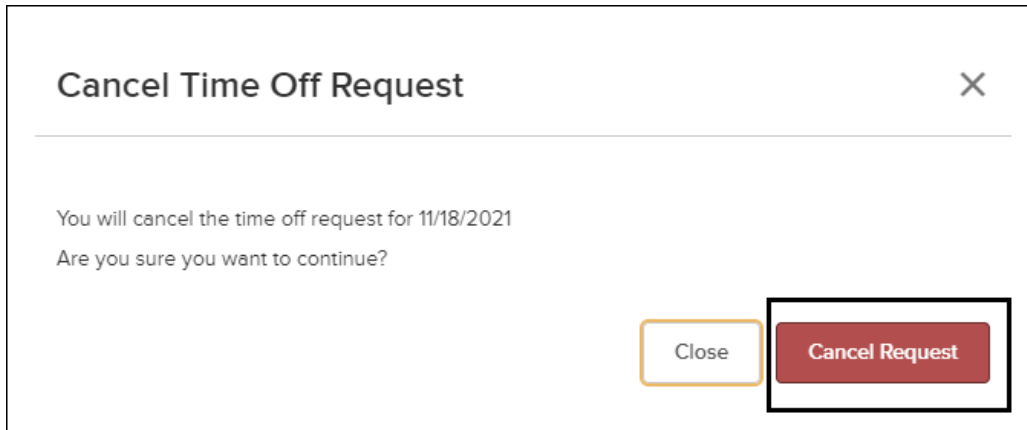04:00 PM

Reason

Comments
No comments entered

Attachments
There are no attachments for this request

Cancel Request

Click **Close** to stop the cancel process.

3. Click **Cancel Request**. A confirmation appears indicating the request is cancelled.

NEOGOV removes the leave request from the list.

Approve or Deny Time Off Requests

Managers approve or deny leave requests using the **Dashboard** in Self Service.

1. Go to the **Dashboard** and click the desired leave request under **Tasks**.
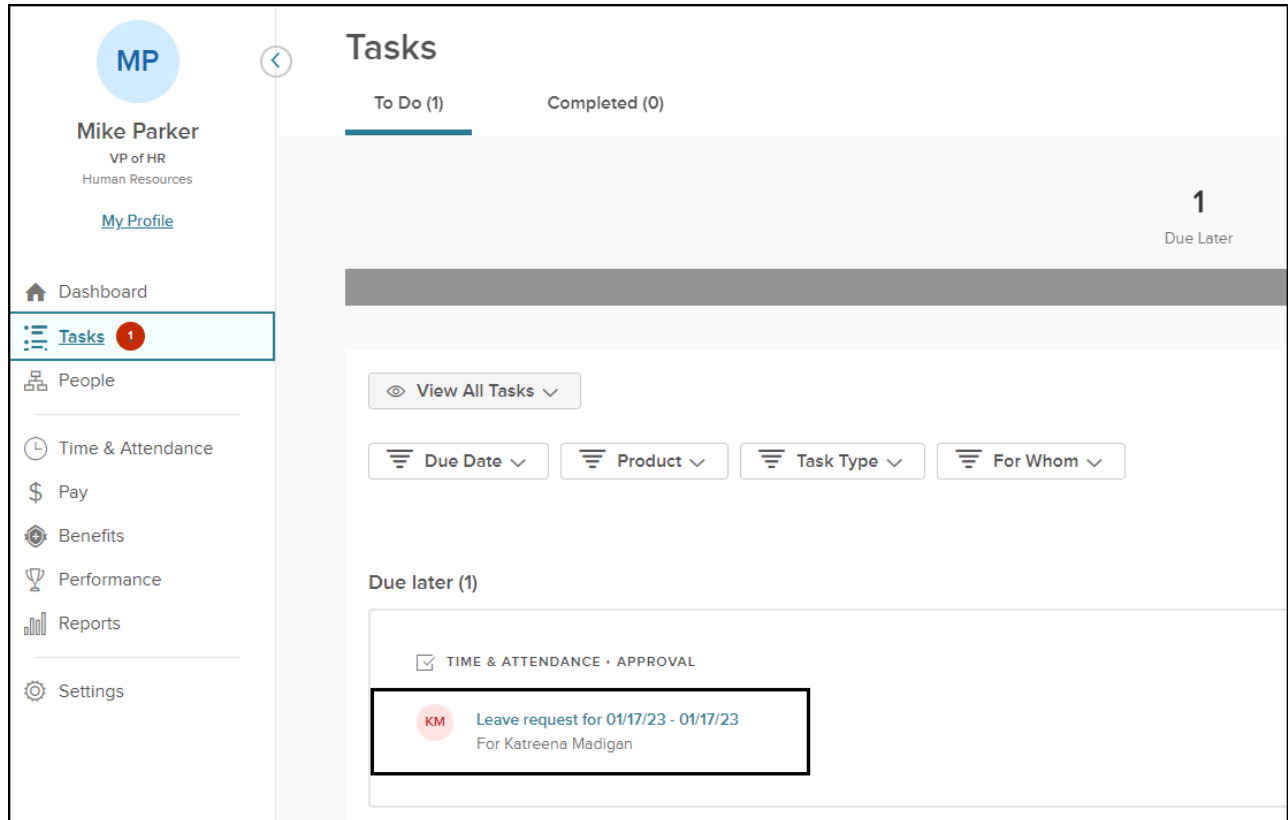
2. On the **Time Off Request** dialog, click **Approve** or **Deny**.

Katreena Madigan's Time Off Request   ×

CURRENT BALANCE	PLANNED TIME OFF
15.36 hours	4.00 hours

Time Code

PTO TKN ⌄

Leave Type

PTO

Start Date

01/17/2023 📅

End Date

01/17/2023 📅

Scheduled Hours

9

Requested Hours

4

Start Time

12:00 PM

End Time

04:00 PM

Reason

Vacation

Comments

No comments entered

Attachments

There are no attachments for this request

Cancel Request   **Deny**   **Approve**

Cancel Request will remove the employee's request in NEOGOV.

3. If denying the request, optionally enter a **Reason** in the **Deny Time Off Request** dialog, then click **Deny Request**.

4. If approving the request, click **Approve** on the **Approve Time Off Request** dialog.

NEOGOV displays a confirmation message for the approval.