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.

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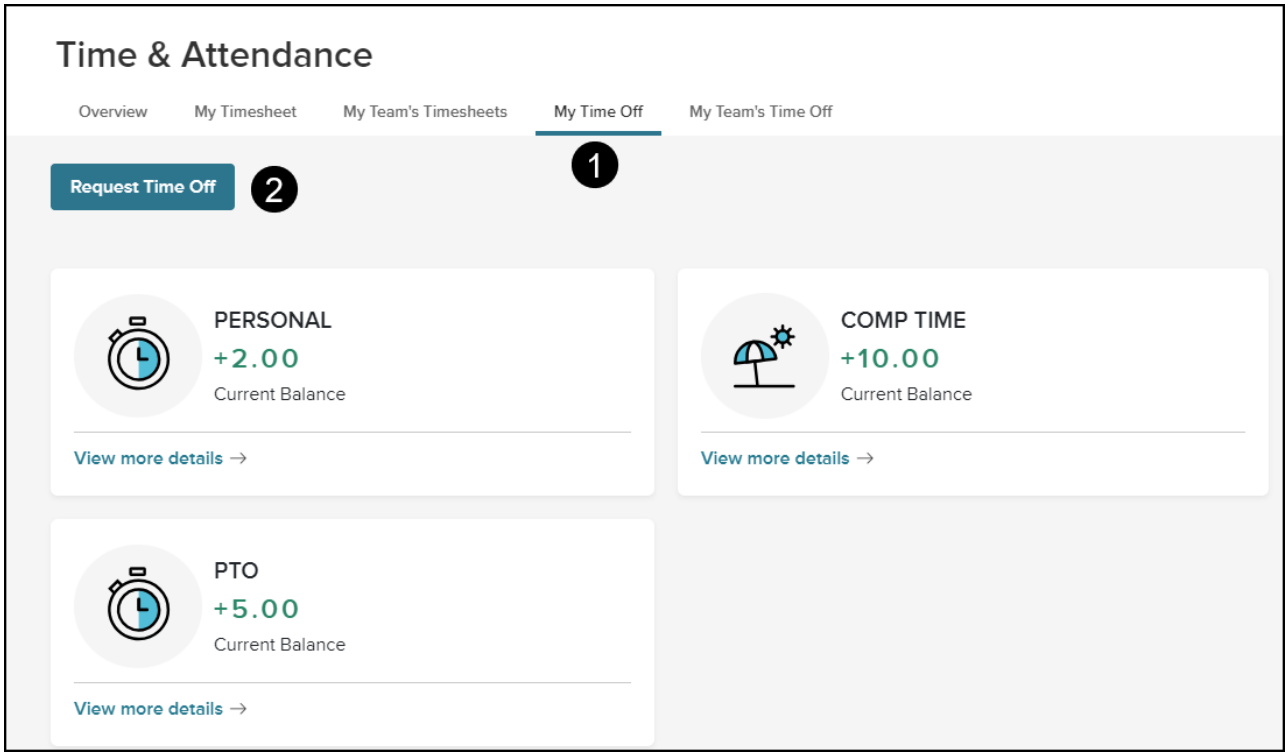
Submit Time Off Requests

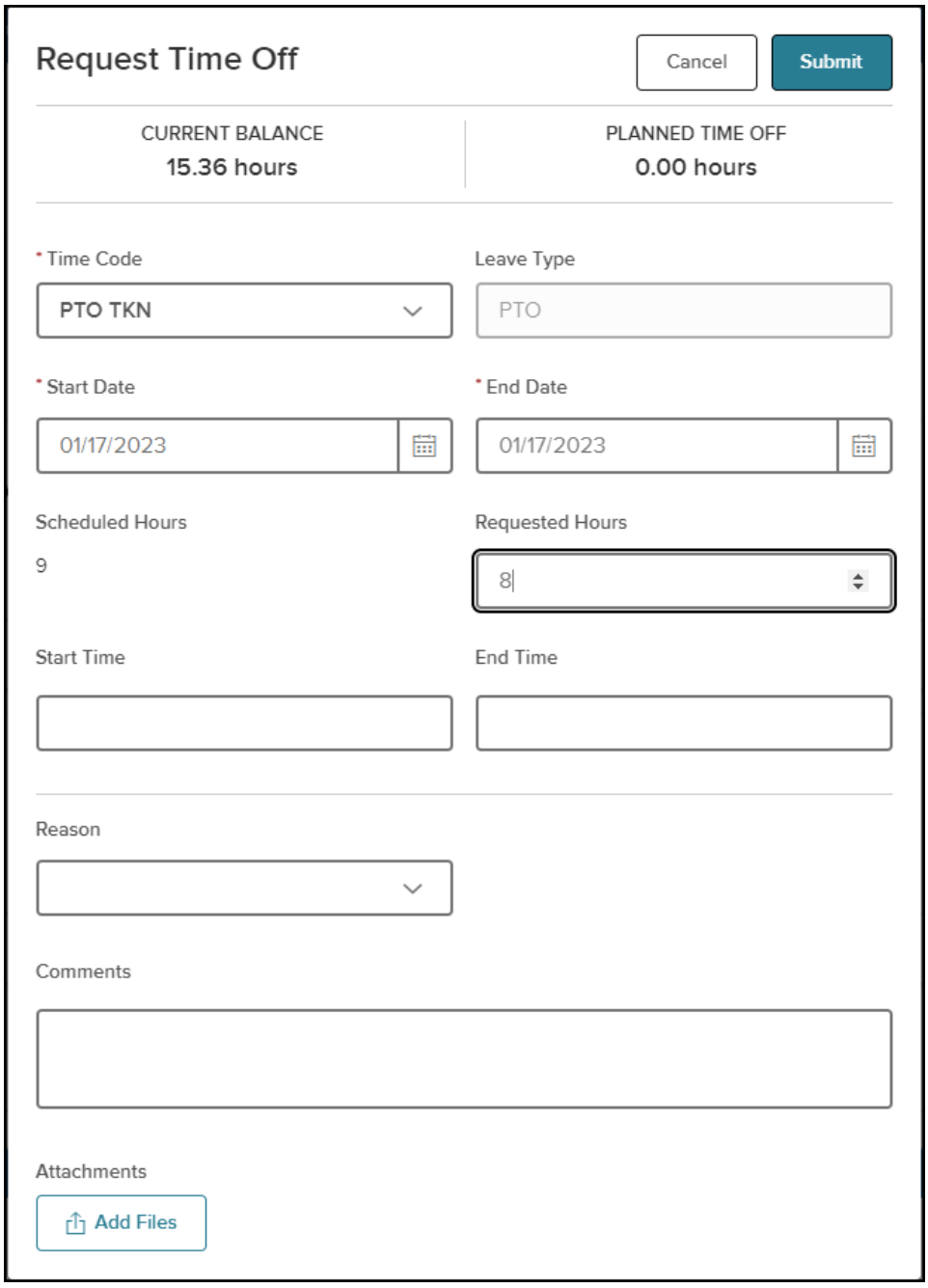
Self Service Dashboard

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

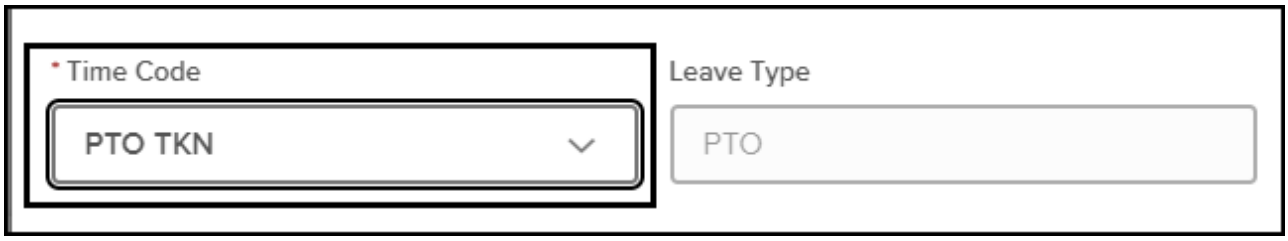
1. In the **Dashboard**, select **Time & Attendance** > **My Time Off**.
2. Click **Request Time Off**. The **Request Time Off** dialog appears.



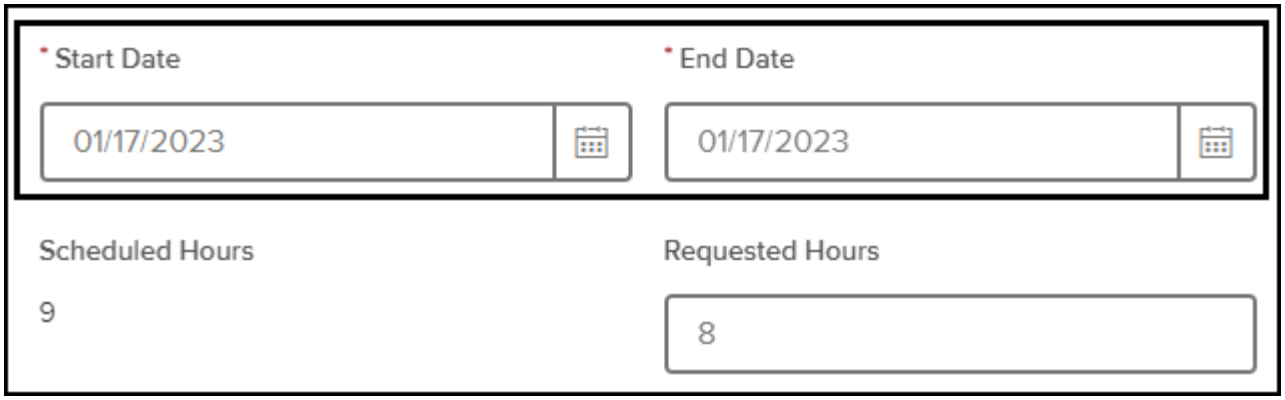
For faster access, click **Request Time Off** under **Quick Actions** on the **Dashboard**.


Request Time Off
Cancel
Submit
CURRENT BALANCE
15.36 hours
PLANNED TIME OFF
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.

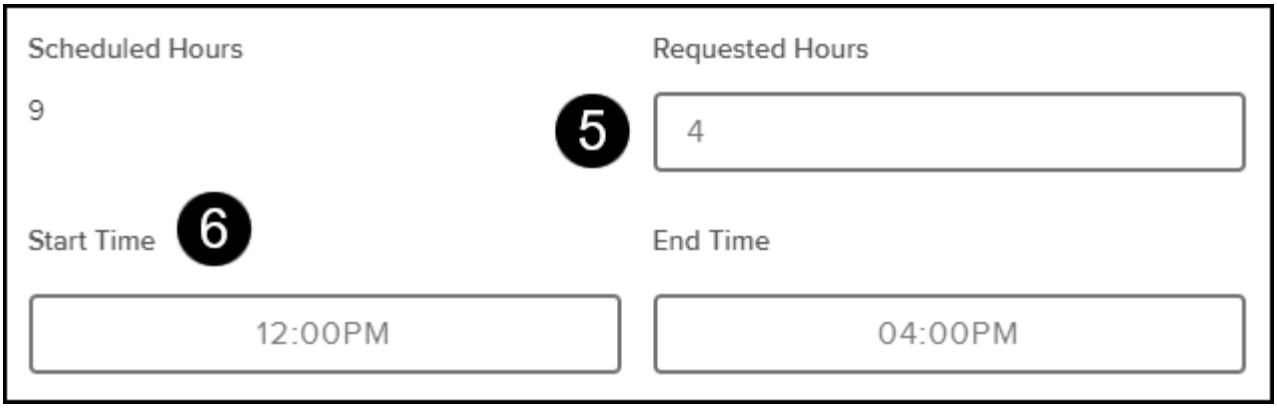


4. Select the **Start Date** and **End Date** for the request. For a one-day or partial day request, enter the same date in both fields. For a multi-day request, enter different dates.



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.



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

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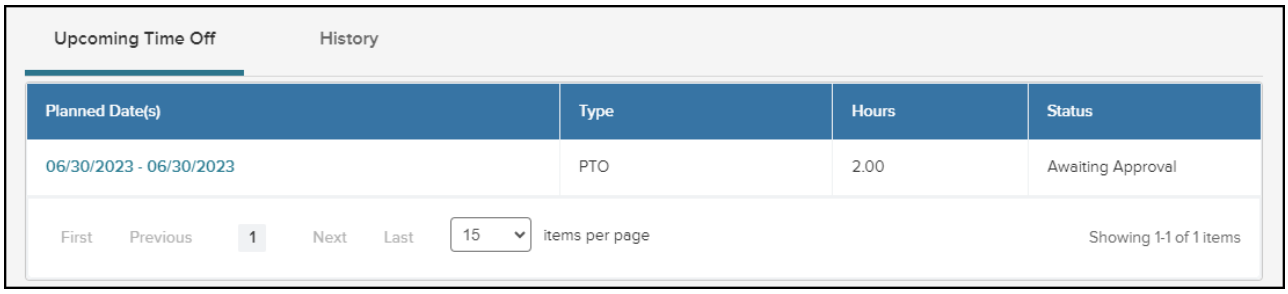
7. Select a **Reason** for this request; this may be optional or required depending on the plan setup.
8. Optionally, add **Comments** to further explain the request.
9. Optionally, click **Add Files** to upload supporting documents.
10. Click **Submit**. The **Confirm Time Off Request** dialog appears.
11. Click **Submit**. A dialog appears indicating that the request is processing.

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.



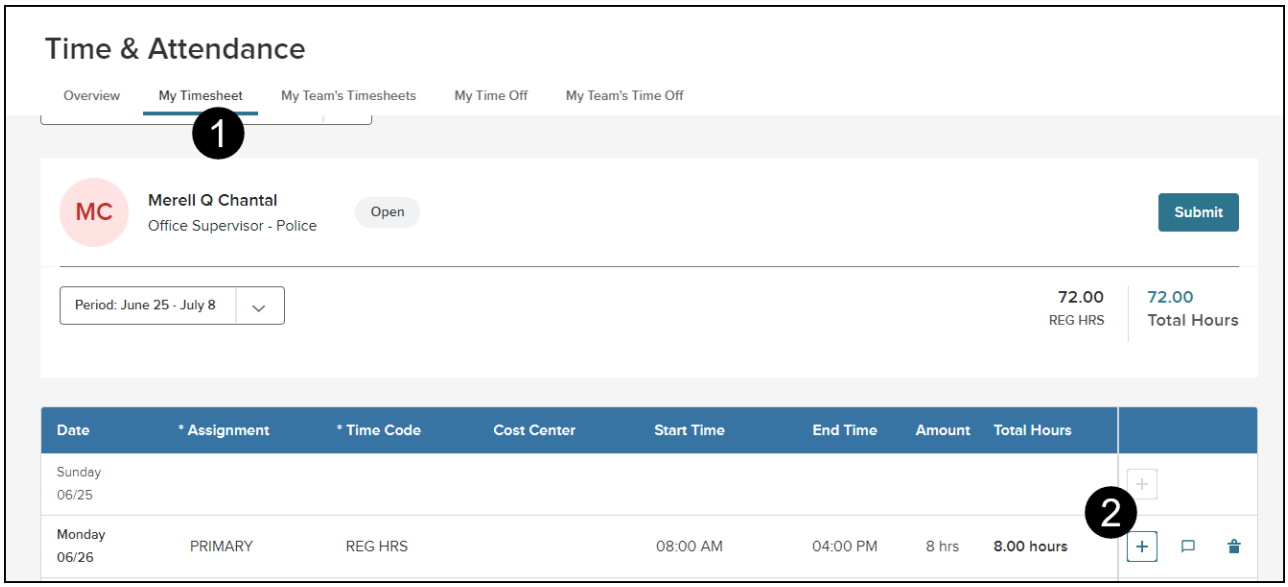
Timesheet Lines

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.

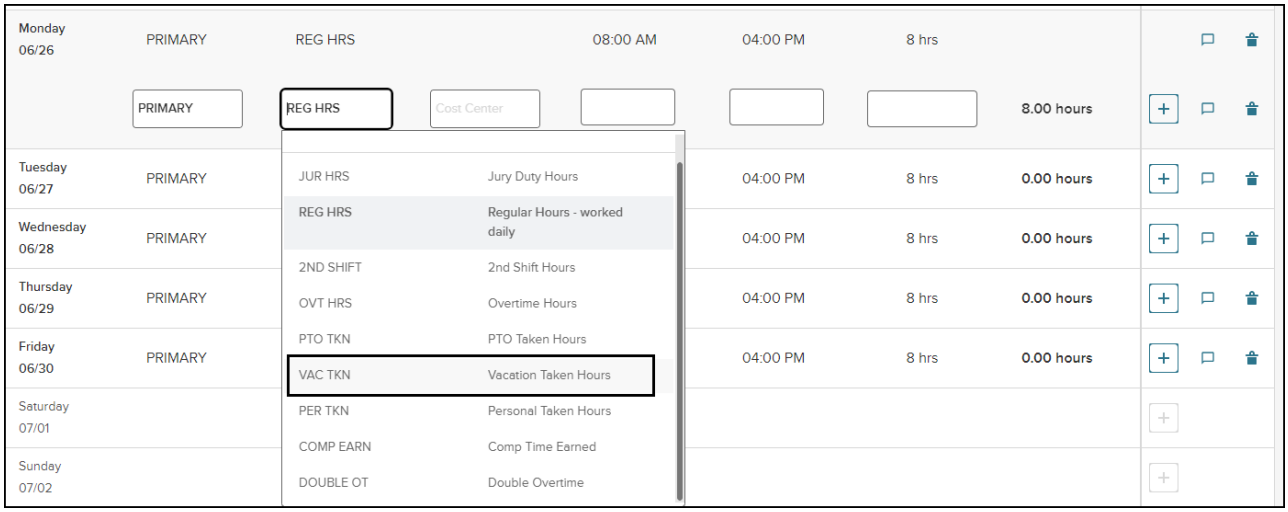
Managers and Employees

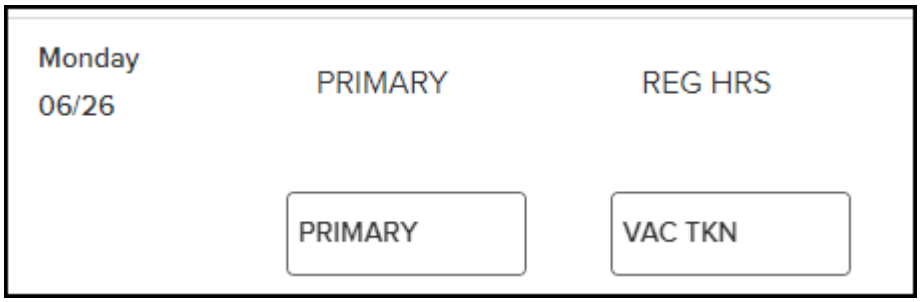
	For managers, use the **My Team's Timesheet** tab, then select the desired employee.

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.

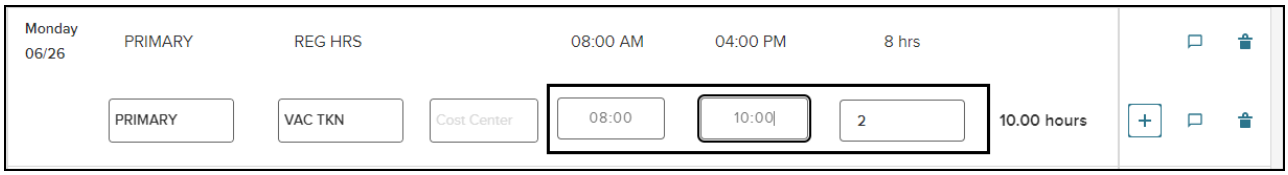


3. Click the **Time Code** field and select the desired time code for the time off.





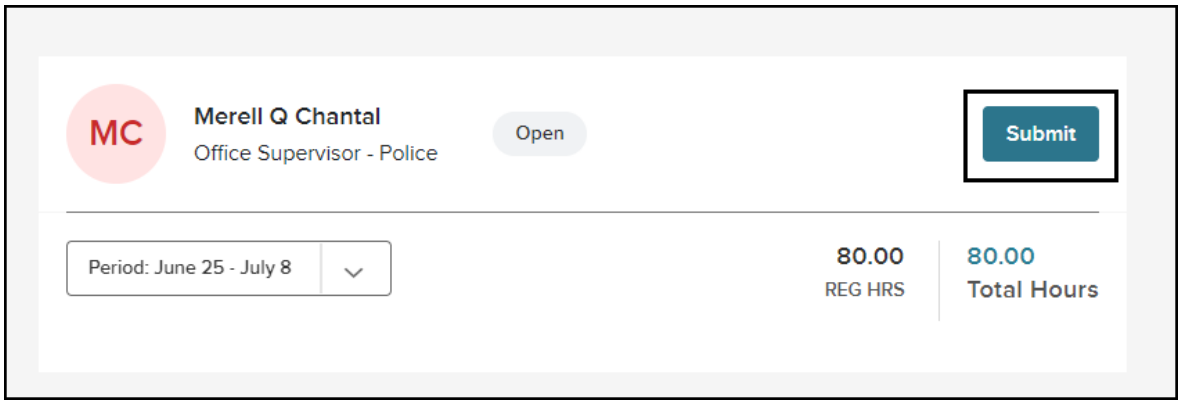
4. Enter the **Amount** to indicate the number of hours being taken off.
5. (Optional) Enter the **Start Time** and **End Time** only if it is a partial day time off and not for the full workday.



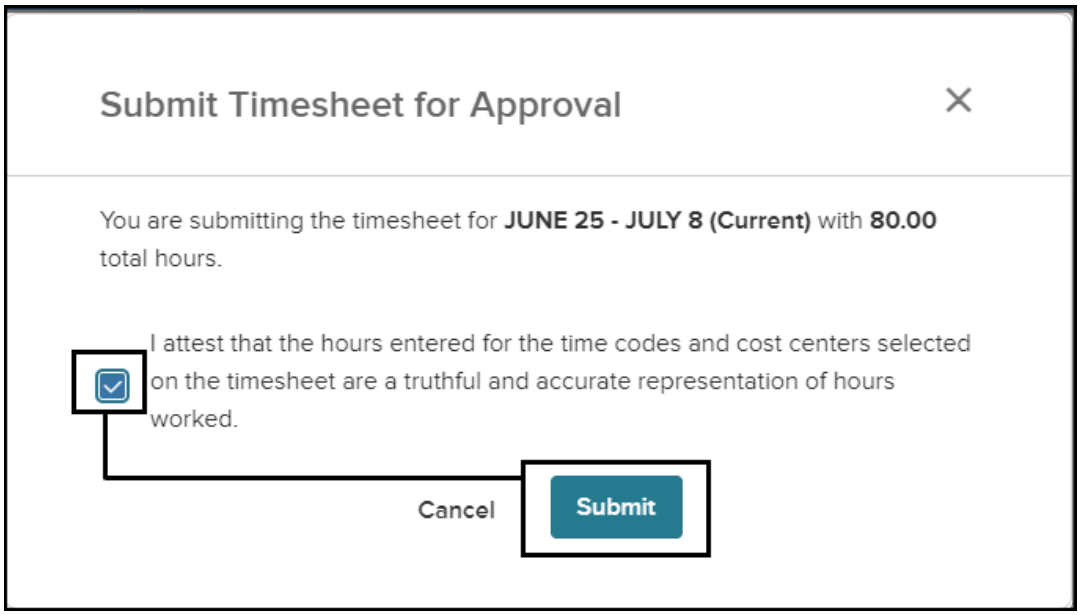
6. Click out of the line to save the change.

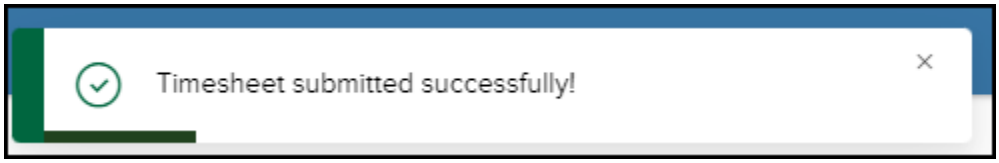
	To enter a note explaining the time off, click the Comments icon.

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

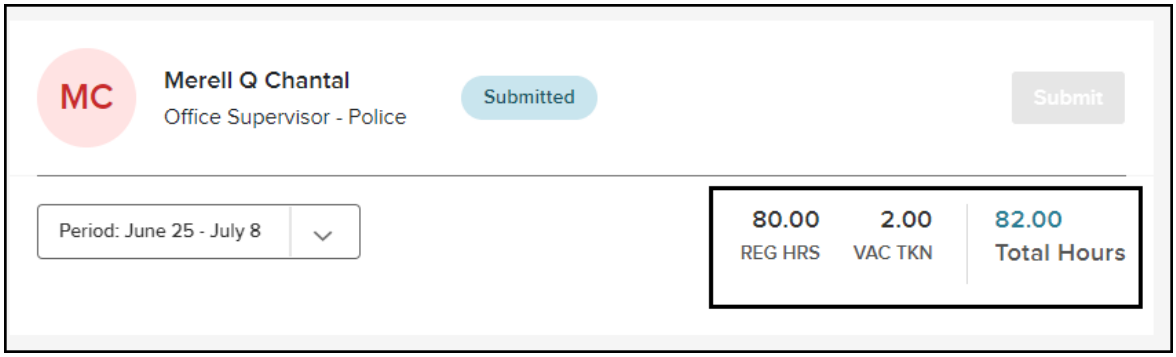


8. Select the approval statement, then click **Submit**. A dialog appears indicating the status.





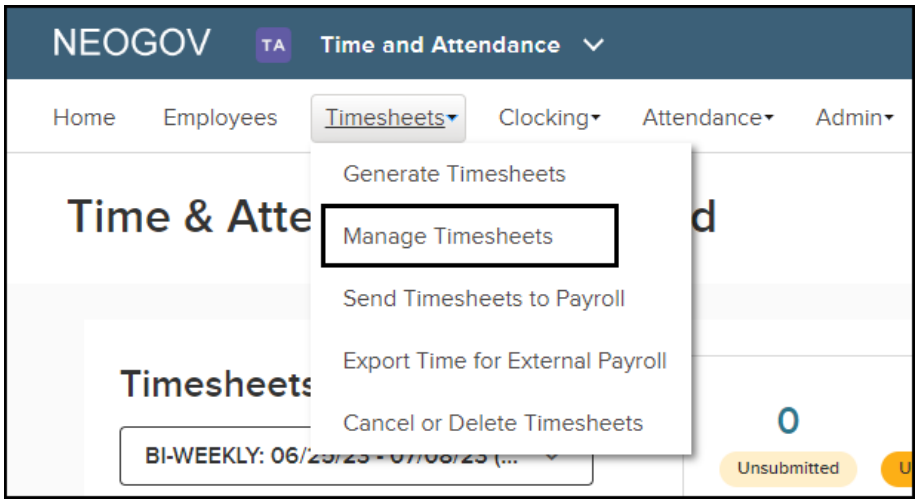
The timesheet updates and displays the requested time off.



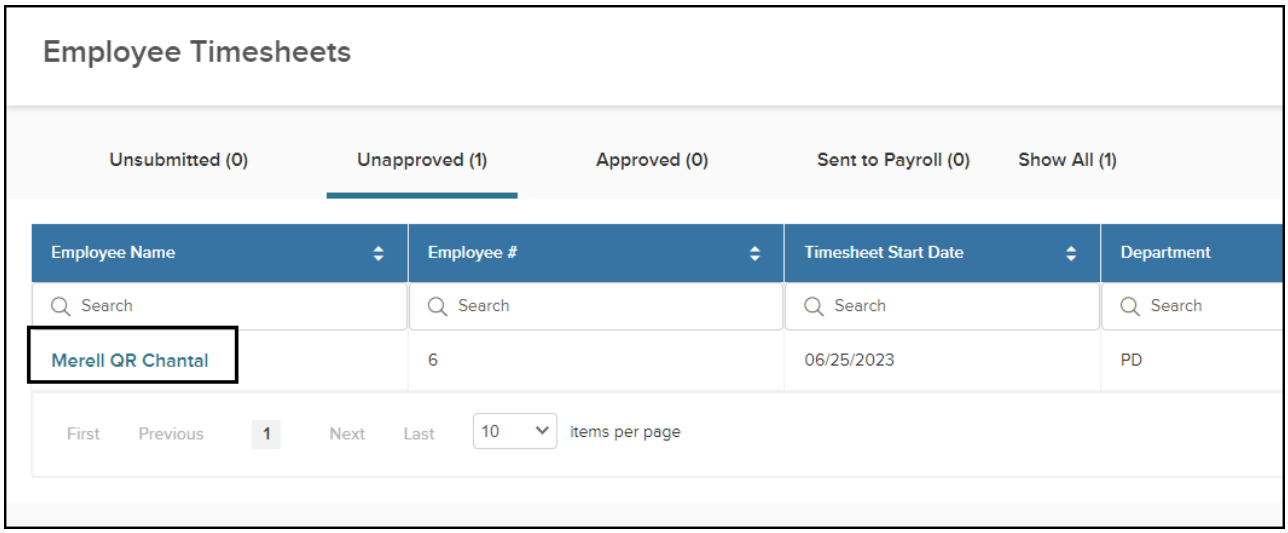
Clicking **Submit** locks the timesheet from further editing while it is in the approval process.

Admins

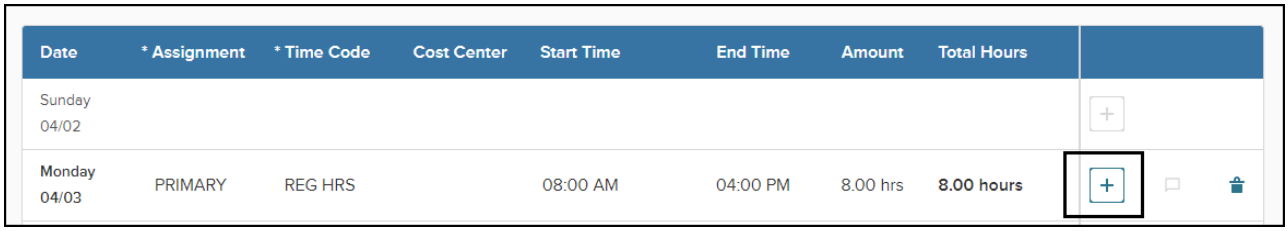
1. From **Time & Attendance Dashboard**, select **Timesheets** > **Manage Timesheets**. The **Employee Timesheets** screen appears. Select an active employee.



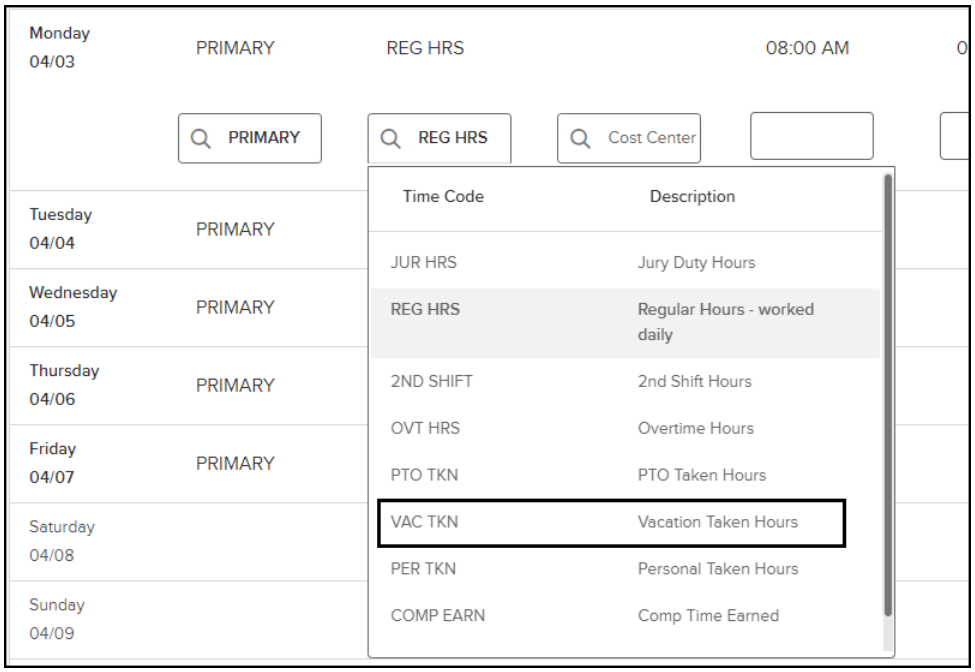
2. Click the name of the desired employee to open their timesheet.



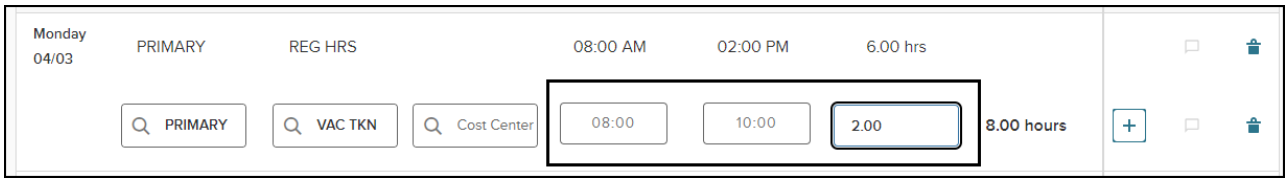
3. Click **+** on the desired line.



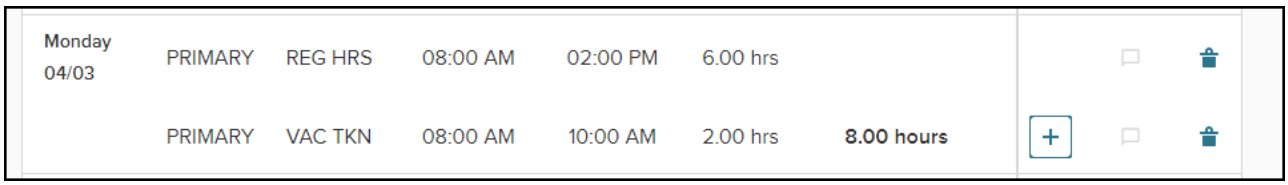
4. Select the **Time Code** to reflect the type of time off.



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**.



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

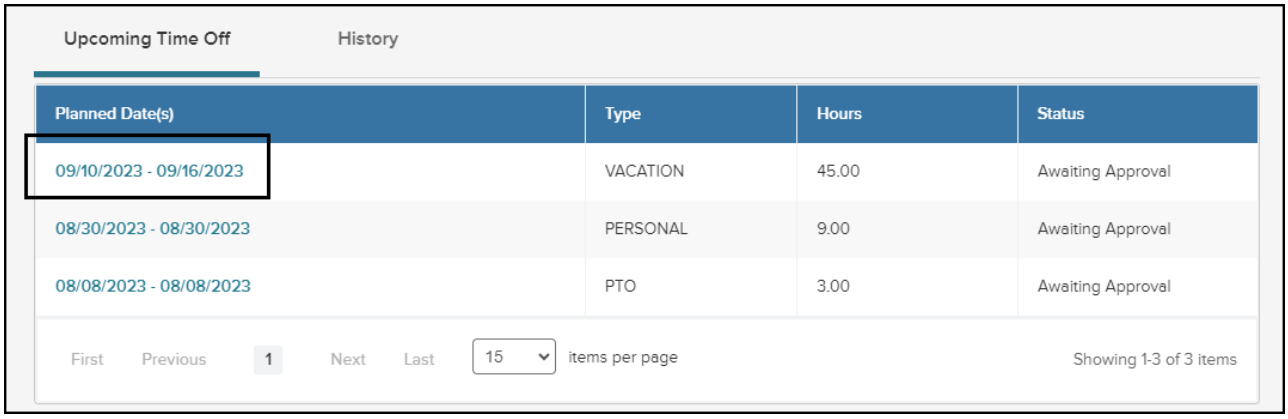


Cancel Time Off Requests

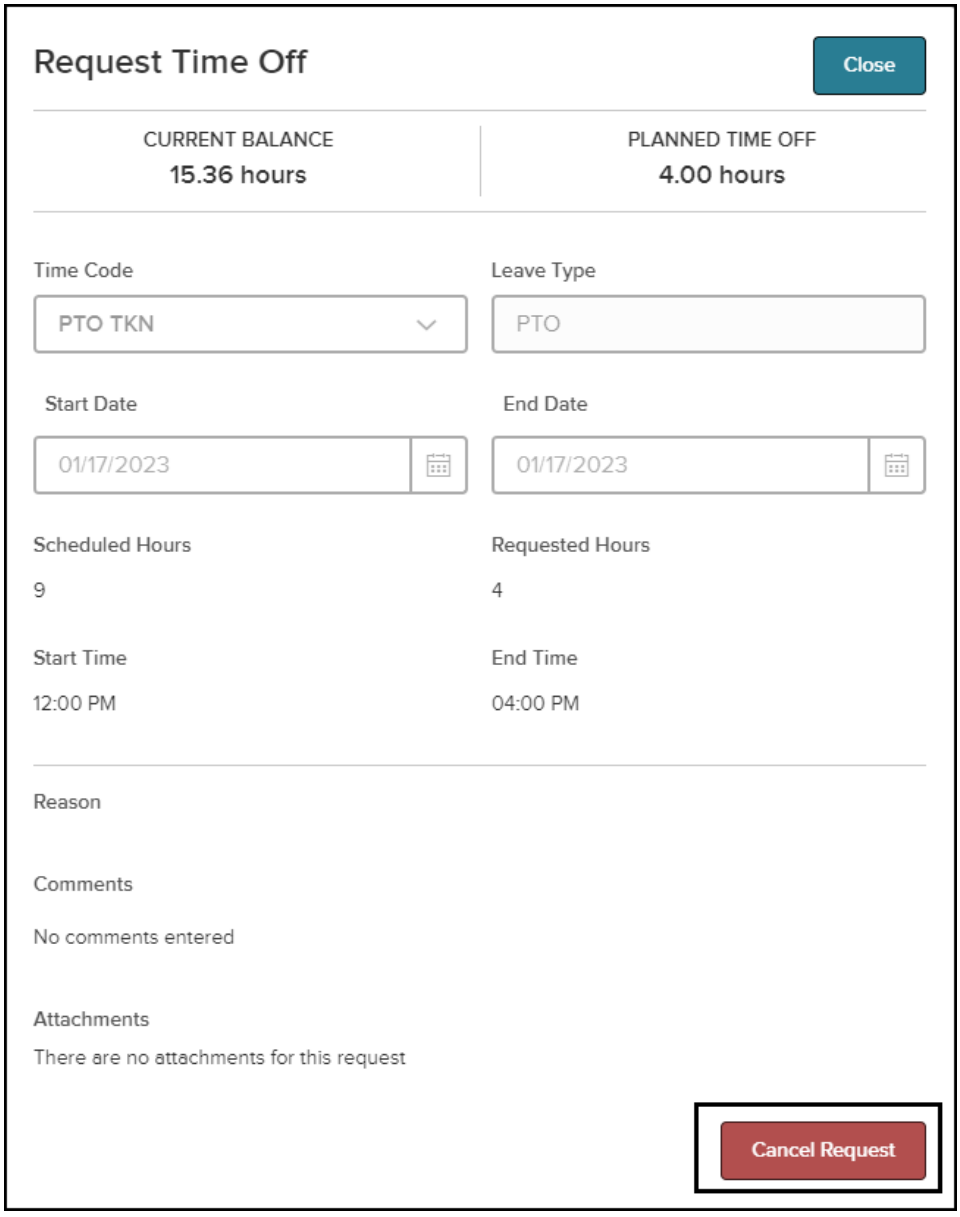
An employee can cancel a submitted request. For example, if their plans change and will not take the day off. The employee can cancel the request up to the point of approval; once approved, the employee cannot cancel the request and must contact the admin to remove it.

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.

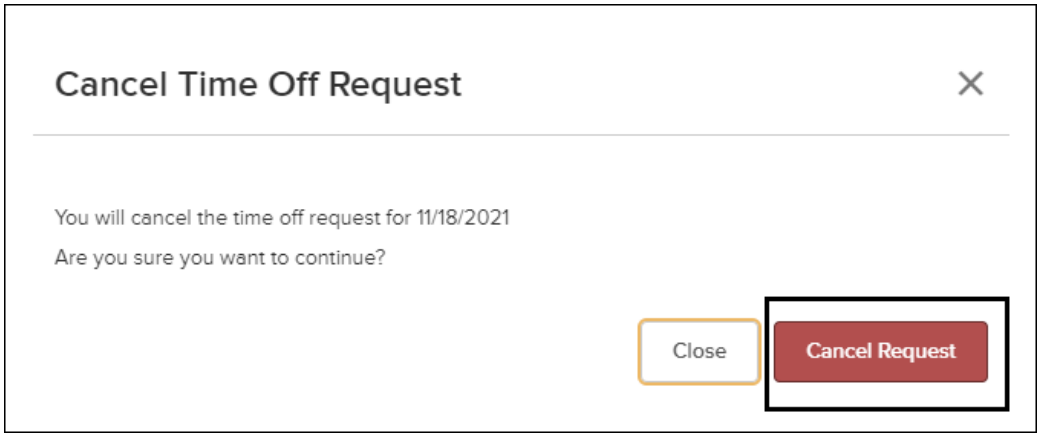


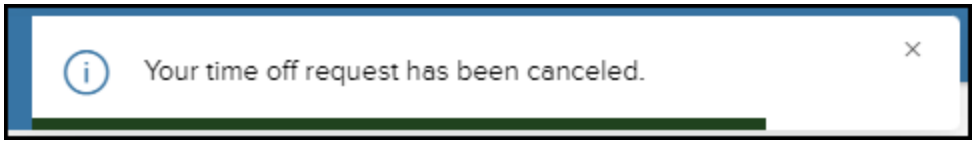
2. Click **Cancel Request**. The **Cancel Time Off Request** dialog appears.



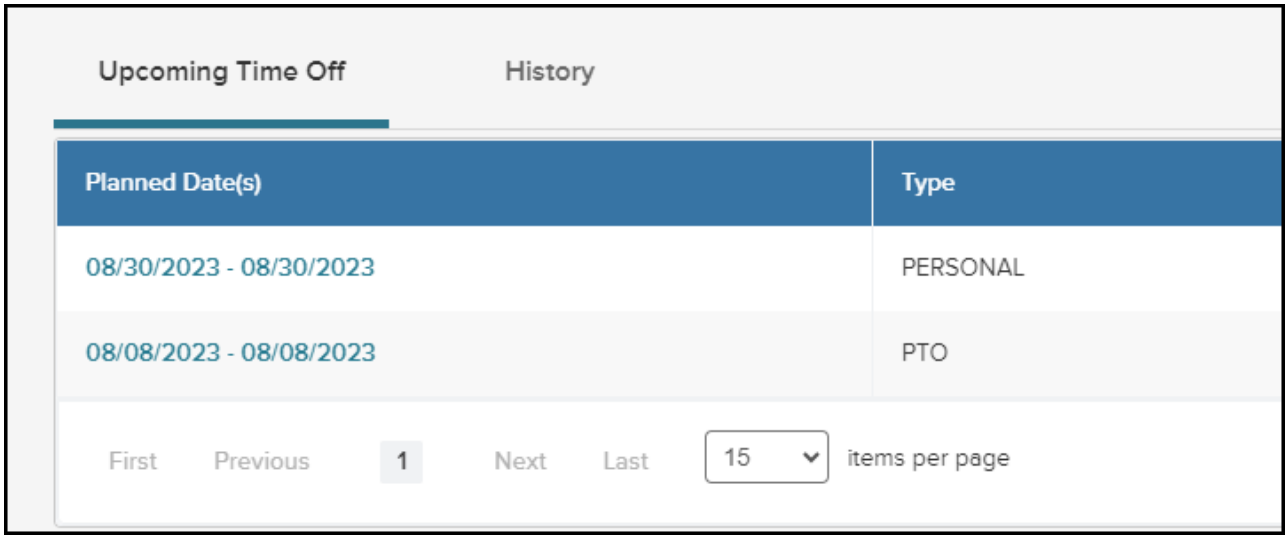
Click **Close** to stop the cancel process.

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





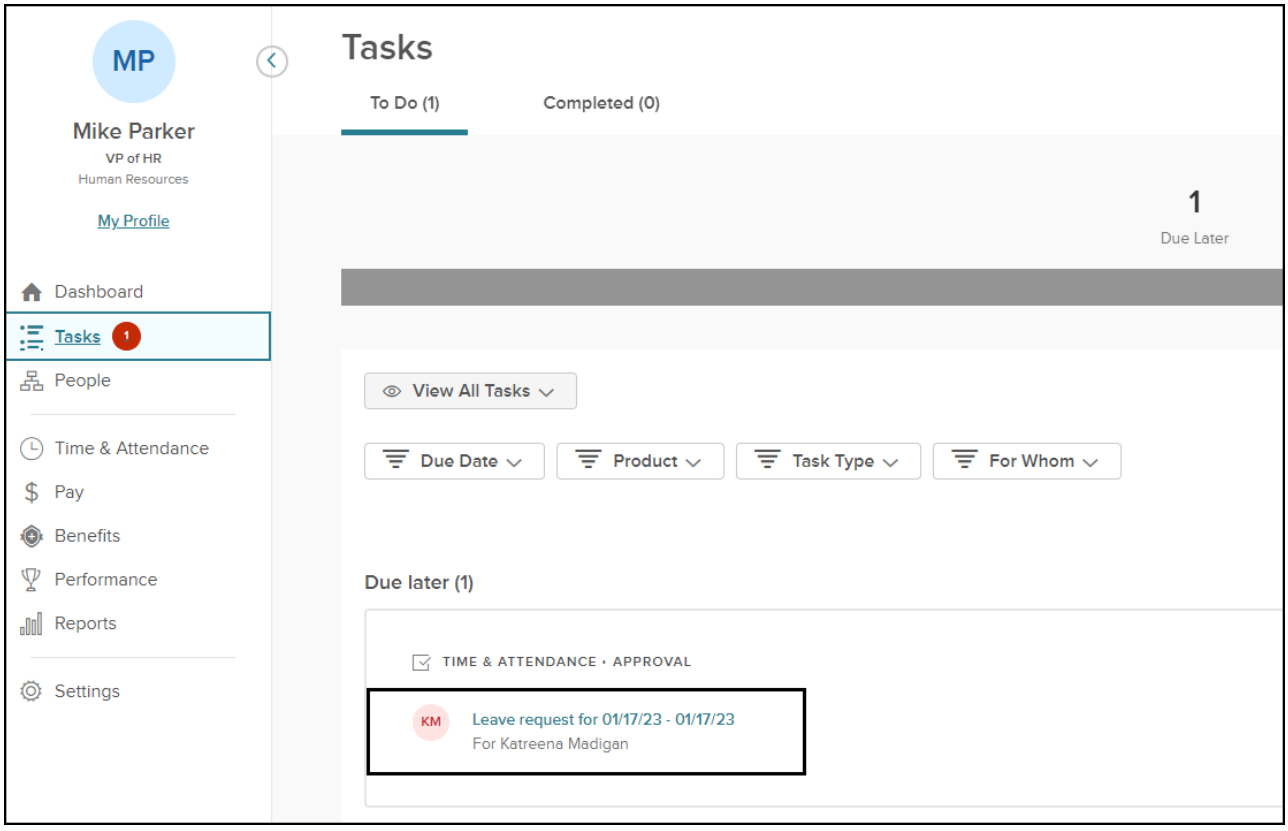
NEOGOV removes the leave request from the list.



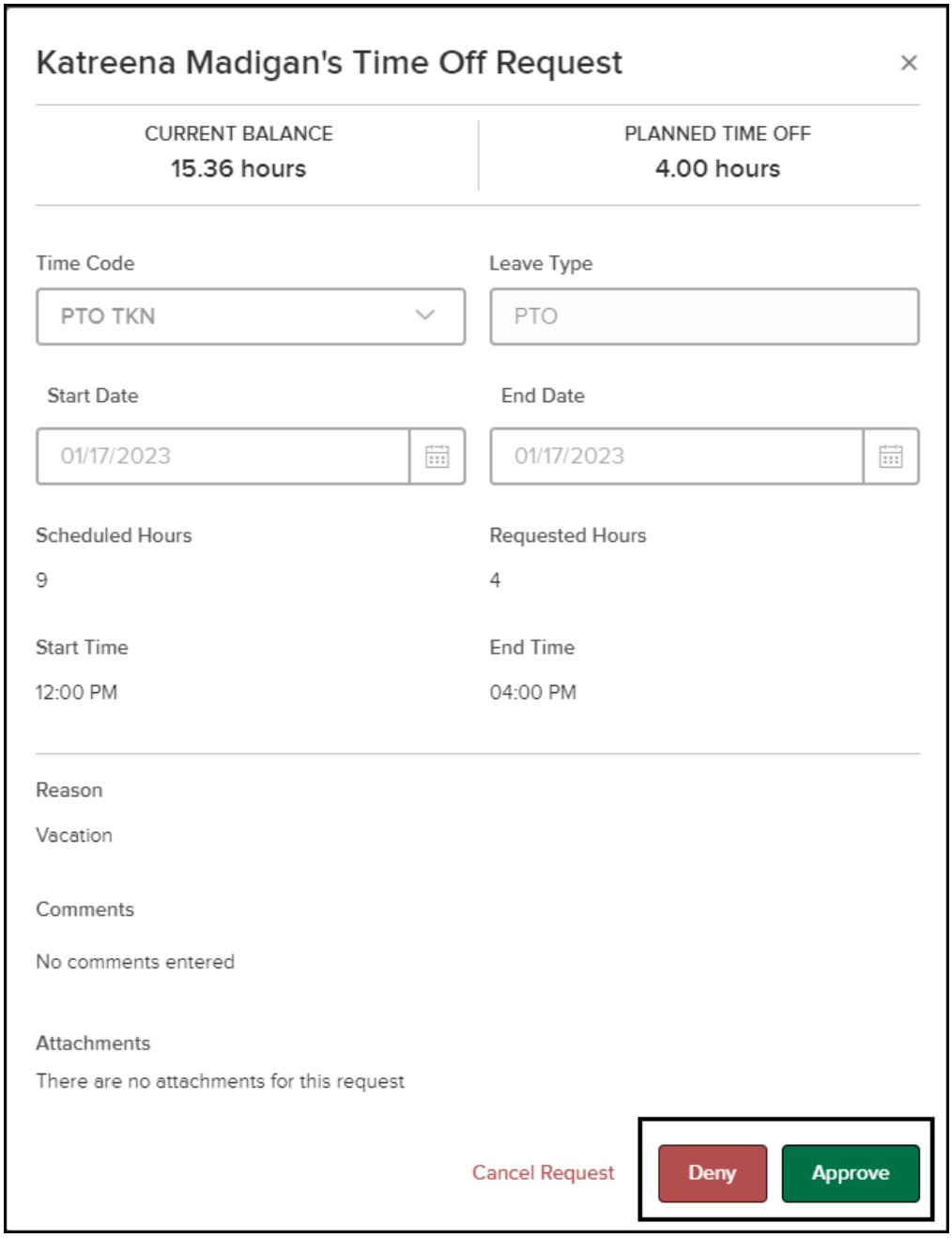
Approve or Deny Time Off Requests

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**.

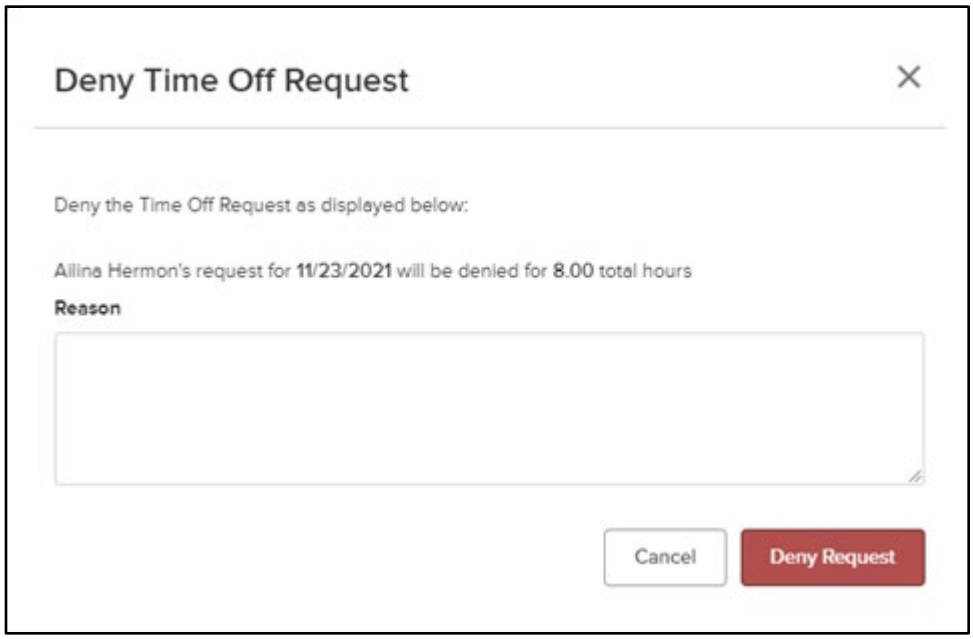


2. On the **Time Off Request** dialog, click **Approve** or **Deny**.



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.