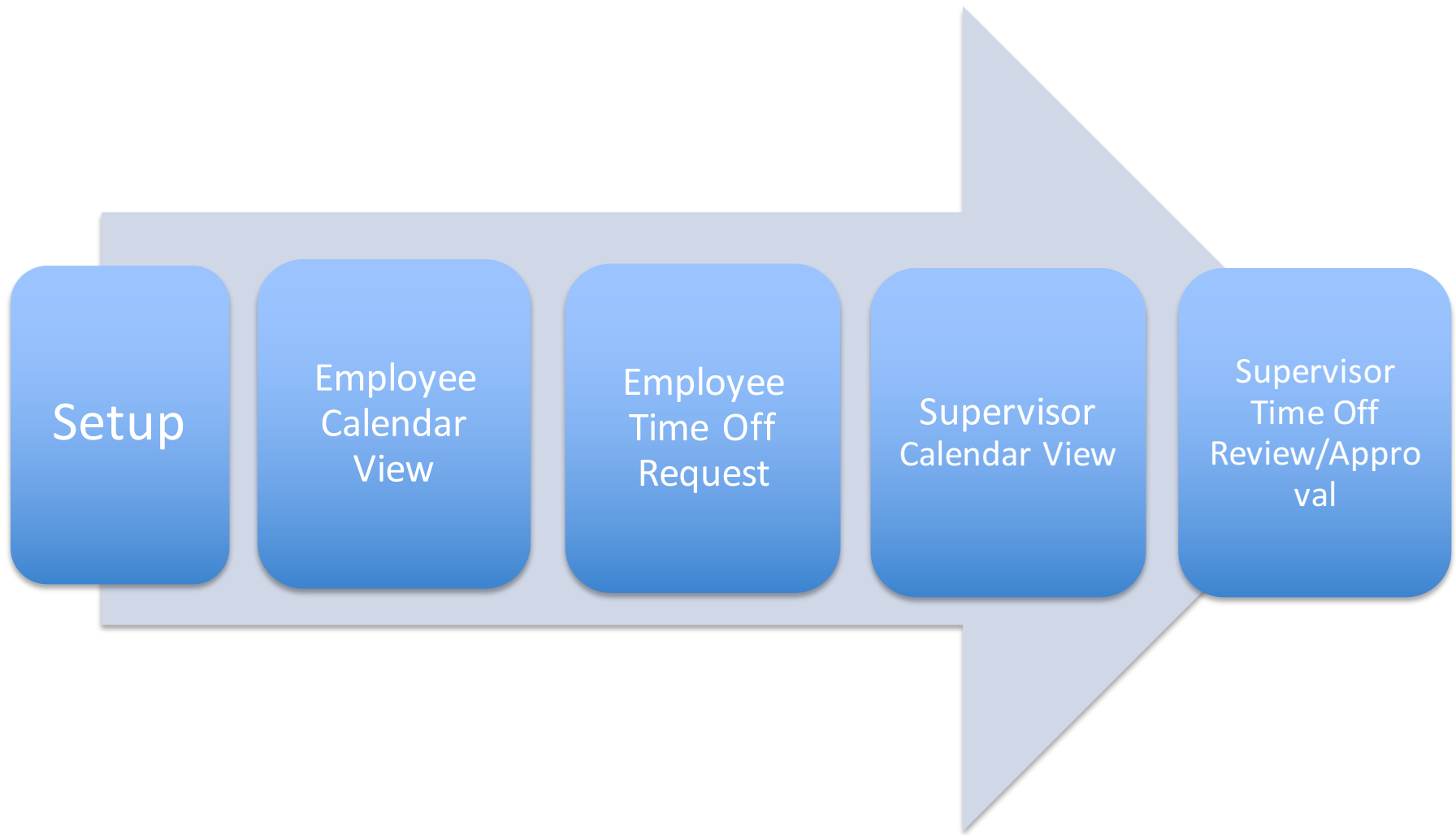


TIME OFF REQUEST CALENDAR & WORKFLOW UPDATE

Time Off Request Flow



Employee Type in Employee Setup – add “Type” field to Employee Setup records

The screenshot shows the 'Employee Setup' form. The 'Identity' section is highlighted with a blue header. The 'Type' field is a dropdown menu currently set to 'Full Time'. A yellow sticky note lists options: '1. Options are: FT Non-Exempt, FT Exempt (Salary), Part Time, Contractor, Seasonal, Other'. A brown note box states: 'Note: this “type” field is not related to the existing type being used in the “Options” field for Work Week Report and Work Month Report functionality.' A white callout box with an arrow pointing to the 'Type' field says: 'Add a new field, with a combo box for Employee Type. Allow it to be scripted against in the script compiler'.

| Identity | |
|---------------|-------------|
| Type | Full Time ▼ |
| Code | |
| First | |
| Middle | |
| Last | |
| Start | |
| End | |
| WebClock | |
| Mobile | |
| Options | |
| Export | |
| Logins | |
| Login | |
| Password | |
| Employee Data | |
| Title | |
| Department | |
| Location | |
| Supervisor | |
| Pay Rate | |

When setting up employees, I need to indicate employee type in the system so the expectation of punching the clock, expected hours and standard work day or work week can be more easily identified in time off requests or other reports/settings.

Time Off Request Settings

The screenshot shows a web interface for 'Time Off Request Settings'. At the top, there are tabs: 'Basic', 'Misc. Settings', and 'ESSRule'. The 'ESSRule' tab is selected. Below the tabs is the title 'Employee Self Service Settings'. A list of checkboxes includes 'WebClock', 'Time Card', 'Schedule', 'Request Time Off', 'Accruals Report', and 'Personal Info'. A section titled 'Note Options:' contains three radio buttons: 'Hide Notes' (selected), 'View Notes', and 'View and Edit Notes'. Below this is another set of checkboxes: 'Employee Time Card Edit', 'Show Unrounded Times', 'Hide Time Card Audit and Comments', and 'Time Off Request Options' (checked). A yellow circle with the number '1' highlights the 'Time Off Request Options' checkbox. Below this are two questions with radio buttons: 'Allow Partial Day Requests?' (selected 'Yes') and 'Require Employees to Enter a Comment?' (selected 'Yes'). At the bottom, there is a section titled 'Set Daily Hours threshold for each type of employee:' with input fields for 'FT Non-Exempt', 'FT Exempt (Salary)', 'Part-Time', 'Contractor', 'Seasonal', and 'All Others (Default)'. A yellow sticky note with a red tab is attached to the right side of the form, containing the text: '1. New section for adding Time Off Request Settings'. A bracket on the left side of the form points to the 'Time Off Request Options' checkbox and the text: 'This section already exists on the ESSRule in Processing Rules'.

Basic Misc. Settings ... ESSRule

Employee Self Service Settings

- ☐ WebClock
- ☐ Time Card
- ☐ Schedule
- ☐ Request Time Off
- ☐ Accruals Report
- ☐ Personal Info

Note Options:

- ☒ Hide Notes
- ☐ View Notes
- ☐ View and Edit Notes

- ☐ Employee Time Card Edit
- ☐ Show Unrounded Times
- ☐ Hide Time Card Audit and Comments
- ☒ Time Off Request Options

1 Allow Partial Day Requests? ☒ Yes ☐ No

Require Employees to Enter a Comment? ☒ Yes ☐ No

Set Daily Hours threshold for each type of employee:

| | | | |
|---------------|----------------------|----------------------|----------------------|
| FT Non-Exempt | <input type="text"/> | FT Exempt (Salary) | <input type="text"/> |
| Part-Time | <input type="text"/> | Contractor | <input type="text"/> |
| Seasonal | <input type="text"/> | All Others (Default) | <input type="text"/> |

This section already exists on the ESSRule in Processing Rules

1. New section for adding Time Off Request Settings

(Reseller) Some clients allow only full-day time off requests, others allow partial day. Some clients want employees to provide a comment/explanation when submitting a time off request. TA system should refer to key settings, i.e. Max Hours and Employee Type to ensure that time-off requests adhere to biz guidelines/standards (settings/rules dictate max amount of hours each type of employee can request for each day in a time off request). This simplifies the TOR process & helps my clients control exposure to unnecessary PTO costs, & Obamacare thresholds.

Calendar Settings (Site Level)

- Move Misc settings we have today (who can see calendar settings) into this view.
- Future Note: Site-level access rules apply today, but RBAC/Multi Role will change this to be more granular down the road

Basic Misc. Settings ... TOR Calendar

Time Off Request Calendar Settings

Site can access the Time Off Request Calendar:

☐ Yes ☐ No

Supervisor Permissions:

☐ View all employees
☐ Only view employees assigned to them

Employee Permissions:

☐ Display names of other employees on calendar
☐ Display hours of other employees on the calendar
☐ Display all employees (Default is only employees in their department)

My clients have different access requirements for viewing TORs (based on industry, culture, or simply biz needs & policies). Some clients want their employees to be able to view the names and hours of those with accepted TORs on a calendar. Other clients want to restrict this access.

Employee Self Service TOR Form - Update

A Web Page

http:// Employee Self Service Time Off Request Page

Accrual Balances:

| Type | Balances as of 7/4/2014 | Planned Time | Balances and Planned Time as of 7/4/2014 |
|----------|-------------------------|--------------|--|
| Vacation | 31.00 | 0.00 | 31.00 |

Submit a new Time Off Request Form

Request Type: [Time Off \(Accruals\) Report](#)

From Date: To Date:

7/2/2014 ☒ Full Day ☐ Partial Day

7/3/2014 ☐ Full Day ☒ Partial Day From: To:

Total Hours for this request: 12

Comments:

The Following Supervisors will receive a notification about this request

Bob Jones

(Optional) Select additional managers to receive the notification

☐ Bob Smith

1. Remove the options to do single day, multiple day, partial day.
2. After dates are selected, the dates appear with a "full day" or "partial day" option. If "partial day" is selected, the user is presented with fields to enter their times they will be out for the time off request.
3. Total hours will include daily amount plus hours created by any partial times (if active).
4. Comments are required, if the field appears on the form. Clients can remove comments from the form in their site settings.
5. Remove the optional settings for sending emails to managers from the time off request form, and add a section showing the supervisors/names who will be emailed the request. If nobody will be emailed, call that out as well with a "no supervisor listed to receive this email" in place of "Bob Jones" in this example.

Add a link to the Accruals Report from the Time Off Request Form.

1. When the employee selects the "Days" option the system will use the Daily threshold, set in the Employee Self Service (ESSRule) section for daily hours based on type of employee.

The data flow will be: Get days submitted in time off request > determine which type of employee in the employee setup file > multiply number of days by the hours amount for that type of employee. If no hours amount has been set, then the default is used, and if no default has been set, then it is 8 hours.

(Employee) I need an easy way to request time off (multiple days, full days, partial days with specific hours), and easily know whether it gets accepted and why if it doesn't. Knowing what days are black out, booked, or available would make it easier to know which request is most likely to be accepted. I want to know how much vacation time I have accrued to date (and what my accrual rate is so that I can at least calculate in my head whether I will have enough by the time my TOR arrives.

Employee Calendar view – request from calendar date

Time Off Request Calendar

<Previous Month May 2014 Next Month>

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|--------|---------|---------|-----------|----------|----------|----------|
| | | 1 ✓ 3 ⌚ | 2 ✓ 2 ⌚ | 3 ⌚ | 4 ⌚ | 5 ⌚ |
| | | X 2 | X 2 | 6 1 ⌚ | | |
| 6 ⌚ | 7 ✓ 2 ⌚ | 8 ✓ 2 ⌚ | 9 ⌚ | 10 1 ⌚ | 11 ✓ 2 ⌚ | 12 |
| | X 2 | X 2 | | | X 2 | |
| 13 ⌚ | 14 ⌚ | 15 ⌚ | 16 ⌚ | 17 ⌚ | 18 ✓ 5 ⌚ | 19 |
| 20 ⌚ | 21 ⌚ | 22 | | | | |
| 27 ⌚ | 28 ⌚ | 29 | | | | |

Submit a Time Off Request

Request Type:

Date From: Date To:

5/10/2014 ☒ Full Day ☐ Partial Day

The Following Supervisors will receive a notification about this request
Bob Jones

1. Selecting the clock icon opens a new time off request form with the date selected as the starting date on the request.

(Employee) While reviewing the calendar to determine eligibility for time off requests (other employees have it off, holiday, black out days, etc.), it would be convenient and a good user experience if I can select my time off request start date from the calendar itself.

Show partial day request times on Supervisor Notification Email (update in red font)

Existing email content:

There is a new time off request from **Mark Missing**

Please check the time off requests page in order to approve or deny this new request. (<https://payrollservers.us/pg>)

Days Requested: **Date: 1/14/2014, this is a partial-day request for the following times: out from 7:35am to 12:30pm**

Employee Comments: **Dentist**

Thanks,
Time and Attendance Employee Self Service Portal

NOTE: Do not reply to this email, it is an automated message.

Additional Details on the Time Off Request Calendar for Supervisors

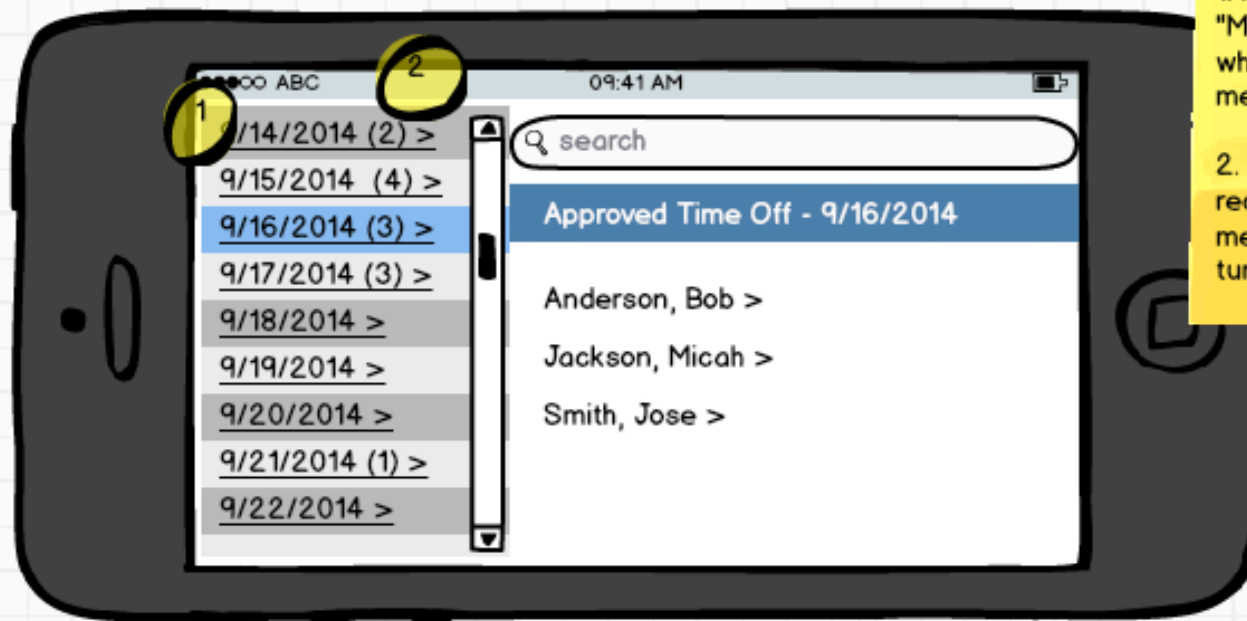
| Time Off Request Calendar | | | | | | |
|--|------------|-----------|-----------|-----------|--------------------------------|----------|
| <Previous Month | | May 2014 | | | Next Month> | |
| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
| | | 1 ✓ 2 | 2 ✓ 2 | 3 ✓ 2 | 4 ✓ 2 | 5 ✓ 2 |
| | | X 2 | X 2 | X 2 | X 2 | |
| 6 ✓ 2 | 7 ✓ 2 | 8 ✓ 2 | 9 ✓ 2 | 10 ✓ 2 | 11 ✓ 2 | 12 |
| | X 2 | X 2 | X 1 | X 2 | X 2 | |
| 13 | 14 ✓ 2 | 15 ✓ 2 | 16 ✓ 2 | 17 ✓ 2 | 18 ✓ 2 | 19 |
| | X 2 | X 2 | X 2 | X 2 | X 2 | |
| Name | Department | Hours | Category | Status | Details | |
| Anderson Joe | 1234 | 8 | Vacation | Approved | | |
| Bobbing Harry | 4457 | 8 | Sick | Approved | | |
| Jeremy Olsen | 4457 | 0 | Vacation | Rejected | Multiple Days: 5/9 - 5/18/2014 | |
| | Total | 16 | | | | |
| | | | | | | |
| <input checked="" type="checkbox"/> Show Rejected Requests | | | | | | |

1. Expanded grid appears when a date is selected on the calendar with the details.

2. The user can collapse the details by selecting the "close" X

(Supervisor) I like being able to get the “at a glance” view of the time off calendar, but many times I need to also know the details on a day, so I can ensure my decision for the pending time off is the best decision for the company and my employees. Selecting the date in question and getting a detailed list of the employees with time off is an intuitive and fast way for me to easily get this data.

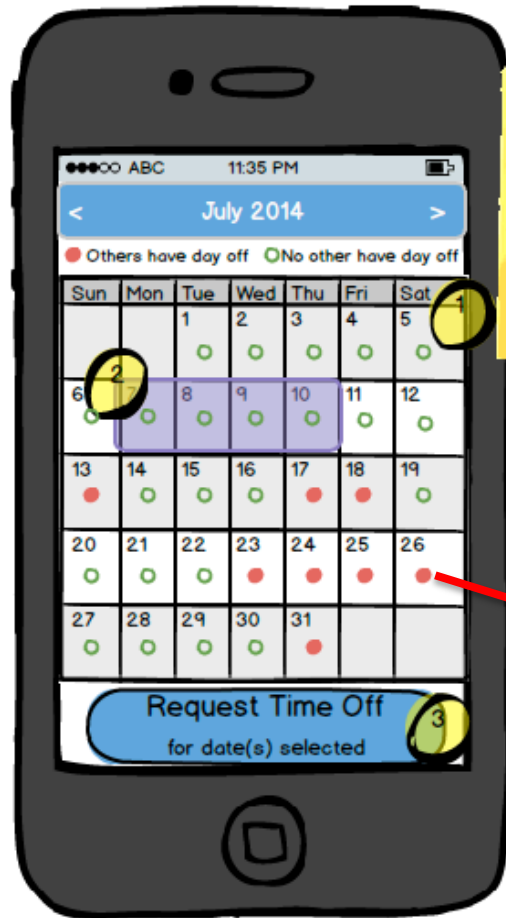
Mobile TOR Details View (Supervisor)



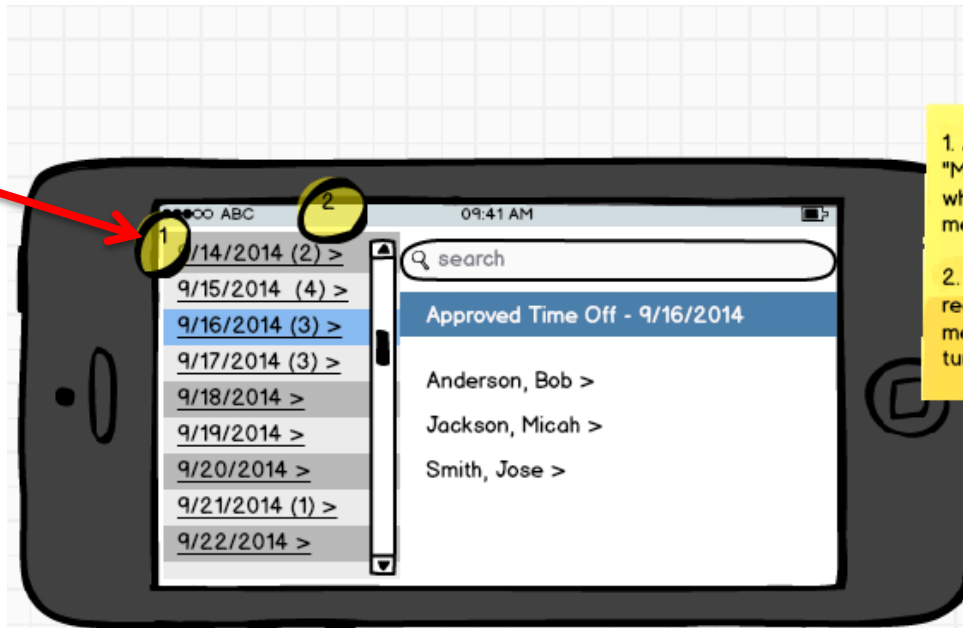
1. Add the same functionality that exists in "My Time Card" in mobile, when the phone is turned horizontal, a date menu appears on the left side
2. Add the number of approved time off requests next to each date in the menu that appears when the mobile device is turned horizontal.

Out in the field, my employees ask me if they can have a day off next week. I like to have a Convenient way to view the week's dates at a glance and how many others already have the Day off, so I can quickly determine my answer and feel good about it for my employees.

Mobile TOR Calendar & Details Views (Employee)



1. Calendar to indicate the days with other employees off.
2. User can select days to request time off.
3. Button to open the time off request page once dates are selected.



1. Add the same functionality that exists in "My Time Card" in mobile, when the phone is turned horizontal, a date menu appears on the left side
2. Add the number of approved time off requests next to each date in the menu that appears when the mobile device is turned horizontal.

(Employee) When reviewing time off request options in mobile, I want to be able to know if other employees have the day off already, but still be able to select those dates, knowing I may not get them. However, also, I need to easily select my dates I am planning to take off and then request my time off from the mobile app.

Alternate - employee self service time off request accrual balance update

| Type | Balances as of 9/12/2014 | Planned Time | Balances and Planned Time as of 9/12/2014 |
|----------|--------------------------|--------------|---|
| Vacation | 31.00 | 0.00 | 31.00 |

Submit a new Time Off Request Form

Request Type:

From Date: To Date:

9/11/2014 ☒ Full Day ☐ Partial Day

9/12/2014 ☐ Full Day ☒ Partial Day From: To:

Total Hours for this request: 12

Comments:

The Following Supervisors will receive a notification about this request

Bob Jones

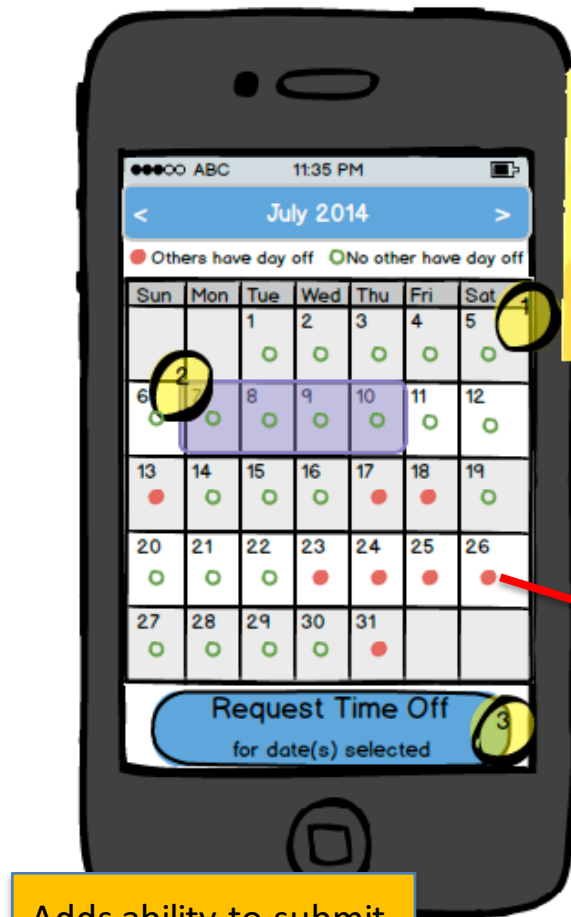
1. If the user selects "Show Accrual Balances" option, the accrual balances will update to show the balance as of the date entered in the "To Date" box. If no date entered, the accrual balances will not re-process to show an update.

The date after Balances as of, and Balances and Planned time as of, will update to reflect the re-processed date.

Add a button for employee to update balances to reflect the "To Date" in their request

(Employee) I need a way to determine my accrual balance for a future date so I can be more aware of my true balance as of a specified date in the future before making a time off request and sending it for supervisor decision. This way, I know whether I will be paid fully for the time I'm taking off, need to negotiate "unpaid" time off or forget the request all together

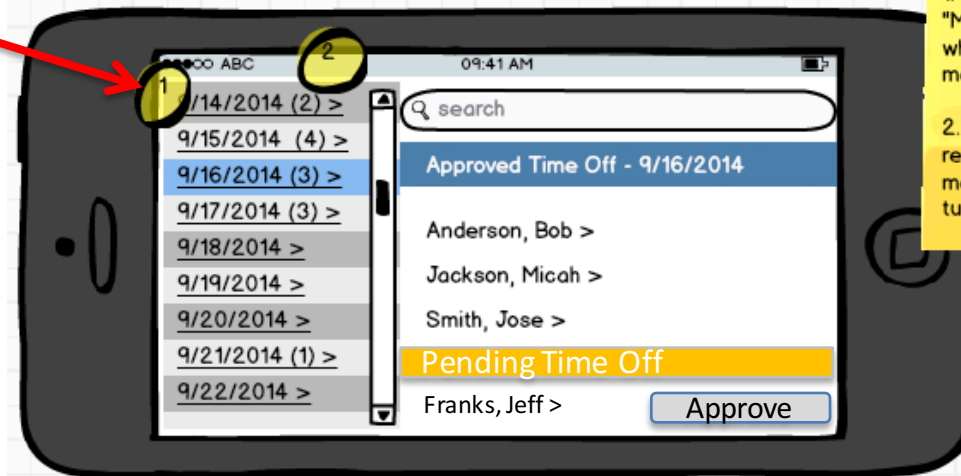
Alternate - Mobile TOR Calendar View (Supervisor)



1. Calendar to indicate the days with other employees off.
2. User can select days to request time off.
3. Button to open the time off request page once dates are selected.

Adds ability to submit TOR for an employee

Adds in Pending Time Off Requests & Ability to Approve



1. Add the same functionality that exists in "My Time Card" in mobile, when the phone is turned horizontal, a date menu appears on the left side
2. Add the number of approved time off requests next to each date in the menu that appears when the mobile device is turned horizontal.

(Supervisor) When reviewing 1 other employees have the day off already, view pending requests, and approve pending requests (ones I know I can approve without viewing all the extensive details that the web calendar might provide). I would also like to be able to submit a request for an employee who doesn't have easy access.