

Time Off Manager

Time Off Manager enables employees to submit requests for time off to their manager for approval. The requests must be linked to a benefit accrual policy, like Vacation or PTO.

The Time Off Manager feature lives in the Me menu in Profile Summary, which currently houses your Personal, Company, and Compensation information. If you are utilizing Paycor’s Perform Time product, your Time Card lives here as well.

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Time Off Notifications

Notification Settings

- The “Work Email” address field found in your employee profile contact information (under the Me menu > Profile Summary) will be **not** used to send the email requests.
- Elect to receive notifications in your **My Settings** area of Perform. On your **Account** tab, enter and Save the email address for your account that may be different from your profile Work Email. To receive Text message notifications, enter and verify a mobile phone number.
- On your **Notification Preferences** tab, select which type of notifications to receive, including: email, Text (SMS), Mobile App or In-App.

The screenshot shows the 'My Settings' page with the 'Notification Preferences' tab selected. The page is divided into sections for 'Basic Information' and 'Phone Numbers'. The 'Notification Preferences' section contains a table for selecting notification methods for various categories.

My Settings

Account Security **Notification Preferences**

Basic Information

First Name *
Michael

Last Name *
Banks

Work Email *
mbanks147247@paycor.com

MY ACTIONS

- Change Your Password
- Change Your Security Questions
- Change other usernames for a Single Sign-On Experience

Phone Numbers

555-235-8569 Mobile Not Verified Verify by Text Verify by Call

+ Add Phone Number

My Settings

Account Security **Notification Preferences**

Please select how you would like to receive each individual notification.

Notifications	Email	Text(SMS)	Mobile App	In-app
General				
Alien/Admission Number Expiration Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Completed Workflow Notifications	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Document Acknowledgement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee Anniversary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Employee Birthday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Expiring Certification	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Interactive Report Export Complete	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Performance Review	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Request for Feedback	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Task List Updates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work Visa Type Expiration Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Workflow Requests	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee TimeOff				
Time Off Request Approved	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Time Off Request Denied	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Manager				
Time Off Request Canceled	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Time Off Request Created	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Cancel Save

Notification Emails

- Within the notification emails for any status of request, there is a link directly into Perform within the email for your Manager to review and take action on the request. For new Time Off requests, an .ics file of your request to add to your manager's calendar (Fig. 1).
- Once a request is approved, you will receive an email containing an .ics file to add the approved request to your calendar (Fig. 2).
- The emails will contain the benefit requested and time off date(s) for additional detail into the requested days without requiring signing into Perform.

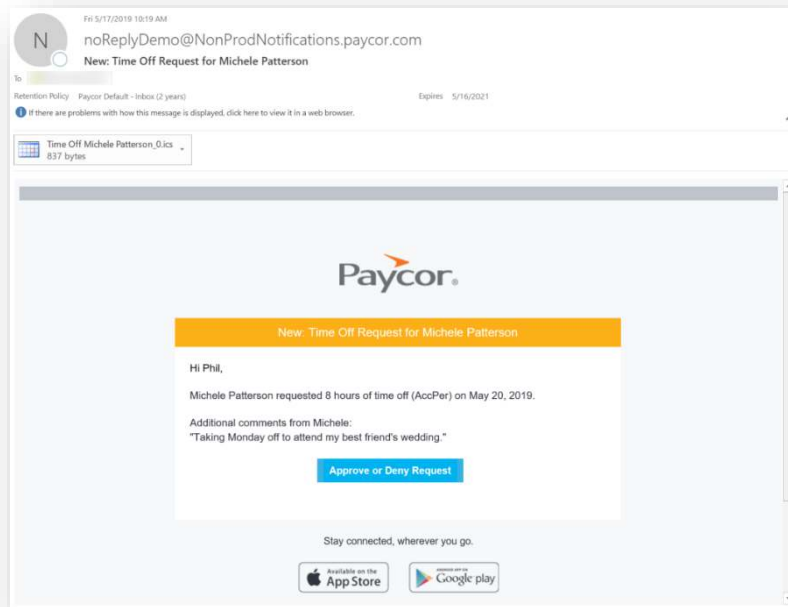


Figure 1

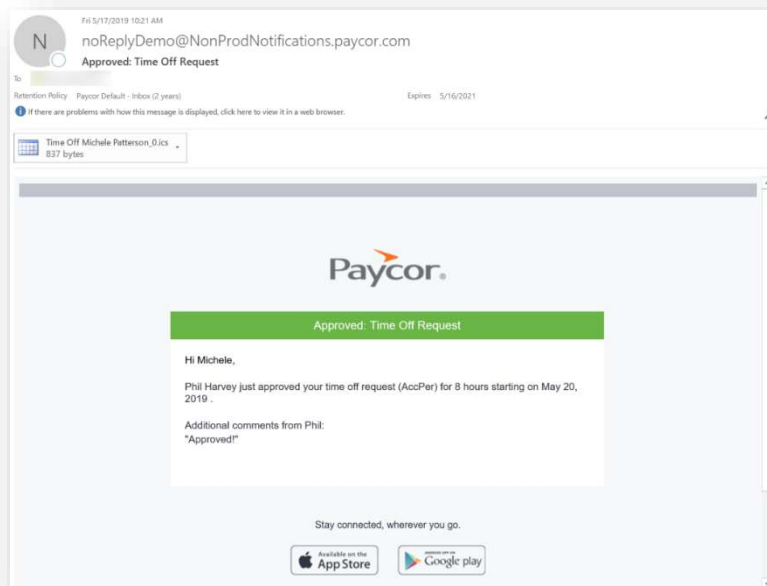



Figure 2

Entering a Time Off Request

Follow these steps to submit a Time Off request:

- 1 From the Accrual Activity page, click  .
- 2 Select the type of Time Off you wish to request. If your organization only has one type available, no action is needed.
- 3 Select the date or date range.
If requesting a Single day, only a Start day is required. If requesting multiple days, both a Start and End date are required.
You may enter a date in the past, but only if the date has not been processed in a payrun. You will see an error message display if the date you enter has been processed (see Figure 1 on next page).
- 4 Once the date(s) is selected, the table beneath will update with the date(s). For each day, enter the number of hours for the request. If using Schedules, you can view scheduled hours or shifts to help enter the correct number of hours you need to request off. It will also display whether the date(s) requested are holidays based on your assigned holiday policies.
- 5 You have the ability to enter Notes for Supervisor, or just click Save.
You also are able to see your real-time benefit balance, meaning the hours are taking into account any previously approved time off requests. This balance will display in your accrual information in your accrual activity page as well.

Screenshots continued on next page

Employee [v] **Accrual Activity**
 Company [v]
 Compensation [v]
 Time & Attendance [v]

Requests 1 + Request Time Off

Dates Requested	Benefit Type	Hours Requested	Status	Actions
12/26/18 - 12/31/18	AccVac	48	Approved by Michael Banks on 08/22/18	Cancel
10/15/18 - 10/18/18	AccVac	28	Pending	[Settings]

Balances

Accrual Code
AccPer - AccumBenefit - Personal [v]

80	0	0	0	80
Starting Balance	Accrued Hours	Taken Hours	Scheduled Hours	Available Balance

History Next Year Current Year Last Year

[Back to Accrual Activity](#) **Time Off Request**

Time Off Type
AccVac [v] 2

Start: 10/15/2018 [Calendar] 3 End: 10/18/2018 [Calendar]

Available Balance including upcoming approved requests	New Balance Preview after this request is approved
120 hrs	92 hrs

Requested Days & Hours

Day of Week	Date	Scheduled Hours	Scheduled Shift	Requested Hours
<input checked="" type="checkbox"/> Monday	10/15/2018	0	—	4
<input checked="" type="checkbox"/> Tuesday	10/16/2018	0	—	8
<input checked="" type="checkbox"/> Wednesday	10/17/2018	0	—	8
<input checked="" type="checkbox"/> Thursday	10/18/2018	0	—	8
Total Requested Hours				28

Notes for Supervisor:
Family vacation - Sean will cover my clients
44 / 300




Cancel **5 Submit**

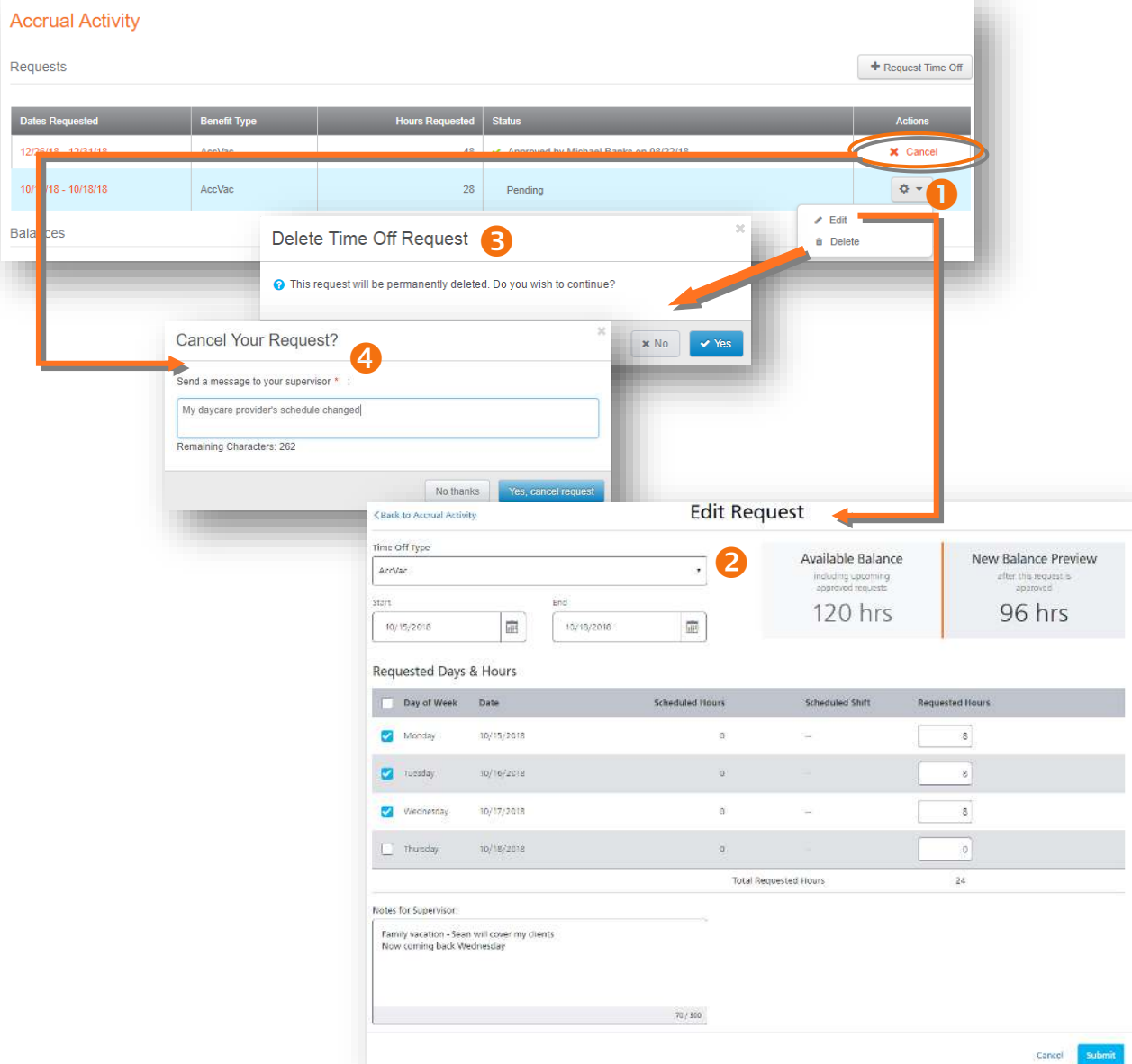
1 Oops! You can't request time off during this pay period (07/28/2018 - 08/10/2018), it was already processed.

Figure 1 - Potential Error Message




Changing a Time Off Request

Follow these steps to change a Time Off request:

- 1 To take action on a Pending request, in the Actions column for the request click  and select Edit.
- 2 The request details will display. Make any edits, such as the Accrual Balance to use, Date, or Hours Requested. Once all edits have been made, click **Submit**. Your supervisor will be notified of the edit for your request.
- 3 To remove a request, click  then select Delete. In the confirmation message pop-up, click **Yes**. Your supervisor will be notified that you removed your request.
- 4 To cancel a request that was previously approved, in the Actions column click  **Cancel**. A confirmation message will appear. Choose to edit the default note, then click **Yes, cancel request**. Your supervisor will be notified that you cancelled your request.



The screenshot displays the 'Accrual Activity' section with a 'Requests' table. The table has columns for 'Dates Requested', 'Benefit Type', 'Hours Requested', 'Status', and 'Actions'. A pending request for 28 hours is highlighted. The 'Actions' column for this request shows a gear icon (1) and a cancel icon (4). Three pop-up windows are overlaid: 'Delete Time Off Request' (3) with a confirmation message, 'Cancel Your Request?' (4) with a text area containing 'My daycare provider's schedule changed', and 'Edit Request' (2) showing request details like 'Time Off Type: AccVac', dates, and a table of requested days and hours.

Dates Requested	Benefit Type	Hours Requested	Status	Actions
12/26/18 - 12/31/18	AccVac	18	Approved by Michael Banks on 08/22/18	
10/15/18 - 10/18/18	AccVac	28	Pending	 1  4

Day of Week	Date	Scheduled Hours	Scheduled Shift	Requested Hours
<input checked="" type="checkbox"/>	Monday 10/15/2018	0	--	8
<input checked="" type="checkbox"/>	Tuesday 10/16/2018	0	--	8
<input checked="" type="checkbox"/>	Wednesday 10/17/2018	0	--	8
<input type="checkbox"/>	Thursday 10/18/2018	0	--	0
Total Requested Hours				24