ADP Workforce Now™

Time Off Learning Guide

Participant Guide

Need support after training?

To exchange tips and best practices with fellow users, get on The Bridge—an online community built exclusively for ADP clients.

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Always Designing for People™

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Welcome!

Together, we'll cover the following items:

- View and Assign Time Off Policies
- Adjust Time Off Balances
- Request Time Off
- Process Time Off Requests
- Create a Time Off Worksheet
- View Available Time Off Reports

How to Use This Guide

You'll use this guide as a reference while you're getting familiar with ADP Workforce Now. You may not need to complete all the activities in this guide. Your ADP associate will help you focus on the tasks that apply to your company. All the activities in this guide will help you to prepare the employee data that will be the foundation of your first payroll.

Note: Because we are continually improving our solutions, the screens in this document may differ from those that you see in the product.

Before You Begin

1. Access ADP Workforce Now at https://workforcenow.adp.com.
2. Log on using your username and password.

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Introduction

You'll use the Time Off feature to view time off accruals for employees, enter and approve time off requests, and send time off data to your worksheets for payroll processing.

Viewing Time Off Policies

Overview

Time off policies make up all the rules that determine how an employee is able to accrue and take time off and how their accrual balances are handled over a specified time period.

Starting Point: Setup > Time Off > Time Off Policies

Step	Action
1	Click the name of the time off policy you'd like to view.
2	Scroll through the setup display.
3	Click Cancel.
4	Click Yes.

Important: Do not make changes to time off policies without consulting your ADP representative.

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Assigning Time Off Policies

Overview

You can assign time off policies when you enter a new hire through the New Hire wizard. If an employee's policies change at any time, you can change them using options on the People menu.

Starting Point: People > Time Off > Policy Assignments

Step	Action
1	Click the Employee Search field to find the correct employee. Result: The current policy assignments for that employee are displayed.
2	Click Manage assignments to Assign/Unassign Policies.
3	Make necessary changes to the policies assigned to the employee by clicking Move Left and/or Move Right, then click Continue.
4	Enter an assignment start date. The end date is optional.
5	Click Done.

Note: You can view the policies assigned to the employee through the People menu. To see how policies calculate accrual balances, you must access the Setup menu.

Adjusting Time Off Balances

Overview

At times, you may need to adjust the balance for time off policies that are accrued using settings in the policy. You can adjust the balance if you're granting additional time off or reducing the existing time off amount for an employee. Any adjustment you create follows the policy rules such as maximum carryover and maximum balance where applicable and modifies the employee balance accordingly.

You can also update the time off balances by making updates to the worksheets or manual checks using the Time Off Auto Balance Adjustments feature.

Adjustment Type	Description
Adjust Earned Amount	Creates a transaction type of Earned Adjustment and doesn't affect annual earnings or the calculation of the annual award maximum.
Adjust Taken Amount	Creates a transaction type of Summed Taken. Summed Taken adjustments update the Taken time and Balances, but don't create any time off requests or payroll adjustments.
Recalculate Awards	All the transactions are generated again for the particular policy associated with an employee.

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Making a Manual Adjustment

Starting Point: People > Time Off > Time Off Balances

Step	Action
1	Click the Employee Search option to find the correct employee.
2	Select the policy that you need to adjust.
3	Click the Transactions tab.
4	Click the Make adjustment link.
5	Select the adjustment type.
6	Enter the applicable details based on the type of adjustment selected.
7	Enter Transaction Date.
8	Add notes if necessary.
9	Click Save.

Enabling Time Off Auto Balance Adjustment

Starting Point: Setup > Payroll > Company Options

Step	Action
1	Ensure the payroll status for the company is Approved.
2	Click the company code for which you want to enable time off balance auto adjustments.
3	In the Paydata section, click Enable Time Off Balance Auto Adjustments.
4	Click Enable Auto Adjustments.
5	Click Done.

Making a Time Off Adjustment in a Worksheet

Starting Point: Process > Payroll > Payroll Dashboard

Step	Action
1	Click Manage Payroll for the appropriate open payroll.
2	Select the worksheet for which you want to make a time off adjustment.
2	Insert a new column for the time off policy and click Done.
3	On the row of the employee for which the adjustment is to be made, enter the hours (+ or -) of the adjustment in the new column. Note: You still must adjust the Memo Code balance in the worksheet/Manual Checks to report the correct balance on pay statements.
4	Balance the worksheet and click Done.
5	Process and approve the payroll as normal. The employee’s time off balance is automatically updated as a payroll taken adjustment.

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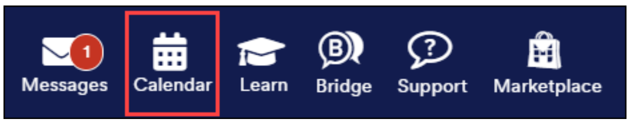
Requesting Time Off

Overview

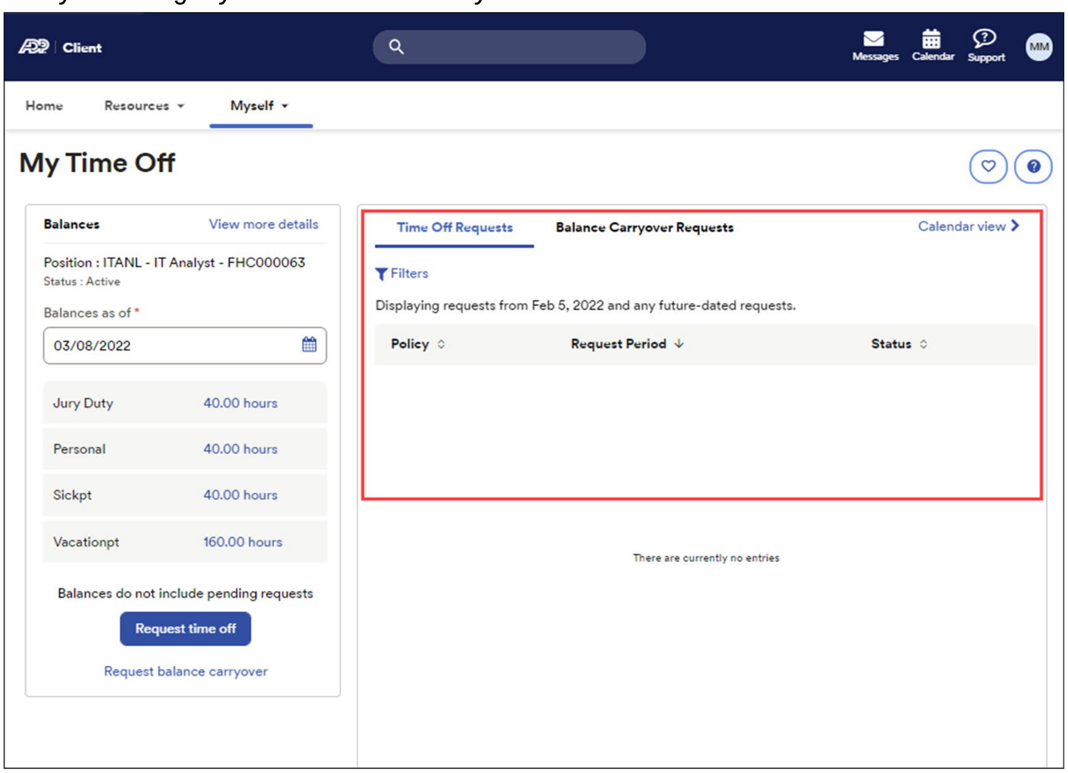
Employees enter their time off requests, either for a single day or for multiple days, on their employee calendars. Before submitting their requests, employees can view their available balances to determine whether they have adequate time to accommodate their time off requests.

Employees can access the calendar in two ways:

- By clicking the calendar icon from the top of the page



- By selecting Myself > Time Off > My Time Off



Element	Description
Time Off Requests	Employees can view PTO requests. The Policy for the request, the Request Period, and the Status of the request are displayed.
Balance Carryover Requests	Employees can view any PTO balance carryover that may have been applied to their profile.
Calendar View	Employees can view any PTO requests in a calendar view.

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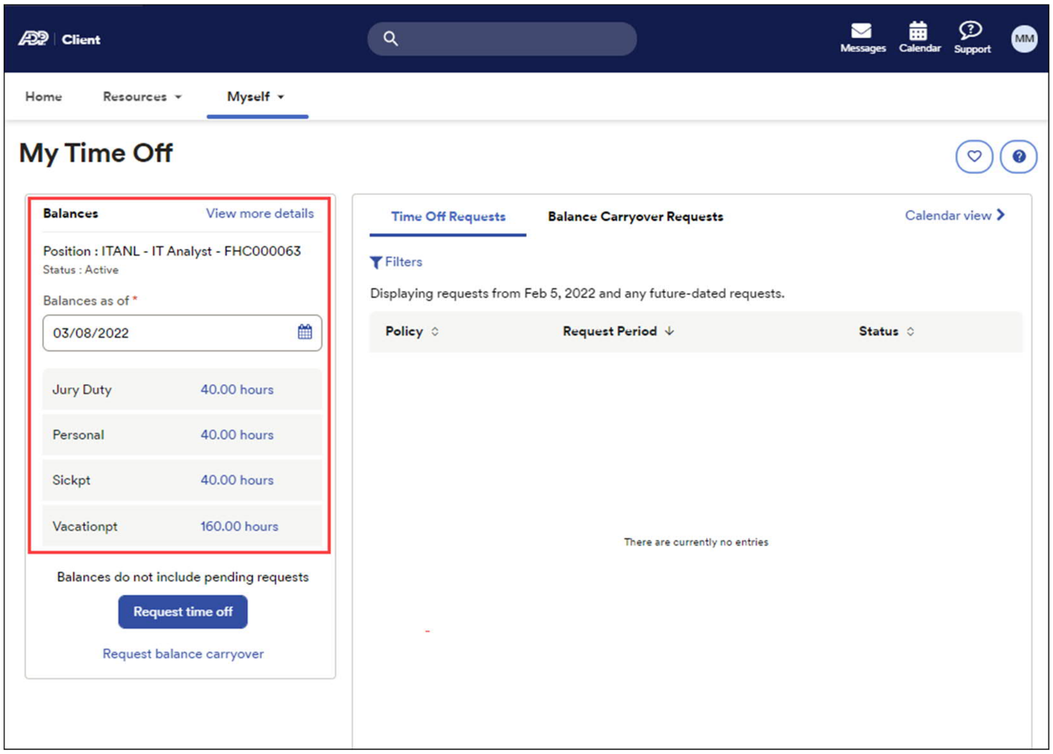
Viewing Time Off Balances

Starting Point: Myself > Time Off > My Time Off

Employees can view their balances before requesting time off to ensure that they have enough time available for their request. Employees may also be able to enter a date in the Balances as Of field to view their projected balances, if your company is set up for this feature, and if the policy is not based on the number of hours worked.



Element	Description
Balance	For each policy, the balance displays the sum of the transactions from the beginning of the policy period to the Balance As Of date. Clicking the balance opens the Balance window, which provides more details about the balance calculation. The types of transactions that are displayed here vary based on the type of policy and your company's settings. Important: Pending requests are not included in the calculation of balances.
View more details	Click View more details to open a slider with additional details about the time off policies assigned. The policies assigned to the employee are listed. Balance-based policies are listed first.
Balances as of field	The employee can use this field to project balances as of the date entered. The balances as of the date entered will reflect any accruals due and any approved time off during that period.

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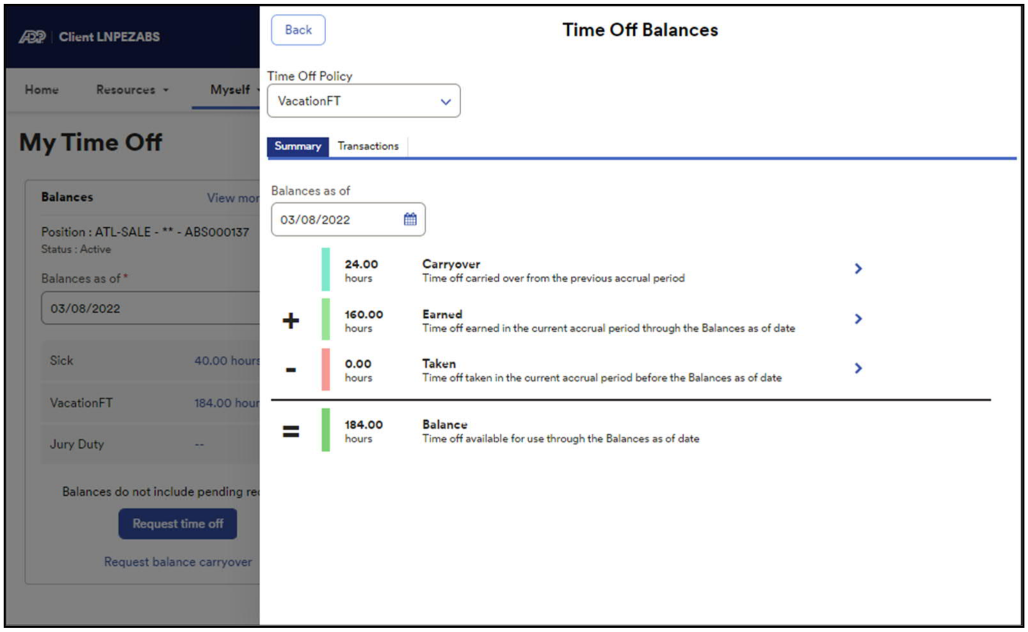
Select the balance hours against the policy name to view how the balance was calculated. Then click Back to return to the My Time Off page.



Requesting Time Off

Starting Point: Myself > Time Off > My Time Off

Step	Action
1	Click Request time off.
2	Enter the request details: a. Enter a Start Date and End Date. b. Select the Exclude Weekends checkbox, if applicable. c. In the Time Off Policy field, select the appropriate time off policy. The Reason Code and Duration Type are applied as defined in the selected Time Off policy. d. In the Start Time field, enter the start time of each request if applicable. e. In the Hours Per Day field, enter the hours. f. Select Make Recurring checkbox, if applicable. g. Click Review.
3	In the Approve By Date field, enter the desired response date, if applicable.
4	In the Comments field, enter any notes about the request that you want to provide to the reviewer. Note: The reviewer sees all notes that employees enter.
5	Click Submit.

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View Pending Requests and Time Off Balances on Timecards or Schedules

Starting Point: Myself > Time & Attendance > My Timecard

Step	Action
1	In the first Pay Date Range field, click (calendar) and select the earliest date in the range that you want to view.
2	In the second Pay Date Range field, click (calendar) and select the latest date in the range that you want to view.
3	Click Find.
4	Click the Time Off Balances tab.
5	To view available balances for a date in the future, in the As Of field, select a date in the future.

Submitting a Request on an Employee's Behalf

Overview

Managers and practitioners can submit time off requests for their employees. When a manager or supervisor submits a request, an approval process may not be needed, based on the approval processes that your company requires. The request is displayed on the employee's calendar as approved time off. If your company sets up a custom approval process, the request might also be sent to the next-level manager in the approval process. When a practitioner submits a request on behalf of an employee, it’s automatically approved.

Instructions: Manager or Supervisor

Starting Point: My Team > Time Off > Request Time Off

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Step	Action
1	Select the name of the desired employee and click **Request time off**. The Request Time Off slider opens.
2	Under Step 1: Enter a Date Range: a. In the **Start Date** field, click (calendar) and select the first date in the request. If the request is for multiple days, in the End Date field, click (calendar) and select the last day in the request. b. Uncheck the **Include Weekends** checkbox, if applicable. You can use the **Select specific days within the start date and end date** option to modify your request.
3	Under Step 2: Enter Request Details: a. In the **Time Off Policy** field, select the appropriate time off policy. b. In the **Amount** field, enter the hours for each day. c. In the **Start Time** field, enter the start time of each request if applicable. d. In the **Actions** field, enter any notes if required.
4	In the **Comments** field, enter any notes and click **Submit**. **Result**: The request is saved. If no further approvals are required in your company's approval process, the request status is Approved.

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Instructions: Practitioner

Starting Point: People > Time Off > Request Time Off

Step	Action
1	Click Employee Search and select the name of the desired employee.
3	Confirm that the desired employee is selected, then click Request on behalf of. The Request Time Off Request slider for the selected employee opens.
5	Under Step 1: Enter a Date Range: a. In the Start Date field, click (calendar) and select the first date in the request. If the request is for multiple days, in the End Date field, click (calendar) and select the last day in the request. b. Uncheck the Include Weekends checkbox, if applicable. You can use the Select specific days within the start date and end date option to modify your request.
6	Under Step 2: Enter Request Details a. In the Time Off Policy field, select the appropriate time off policy. b. In the Amount field, enter the hours for each day. c. In the Start Time field, enter the start time of each request if applicable. d. In the Actions field, select to add note, copy, or delete the request, if applicable.
6	In the Comments field, enter any notes.
7	Click Submit. Result: Because you are a practitioner, the request is approved automatically.

Reviewing Time Off Requests

Overview

You can complete the approval process for an employee's time off requests in Things To Do or the List of Requests. The pending and approved time off requests are displayed on the Team Calendar and the employee's timecard, when applicable.

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Reviewing a Request from Things To Do

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>On the top menu bar, click Things To Do.</td></tr>
<tr><td>2</td><td>Click the Tasks tab to view the Time Off Requests.</td></tr>
<tr><td>3</td><td>Click Review to see the request in greater detail.
Note: To approve or reject the request, click ⋮ (three dots)</td></tr>
<tr><td>4</td><td>Click Check Schedule to see whether other employees have requested time off for the same days as in the current request.</td></tr>
<tr><td>5</td><td>Enter your response to the request.
<table>
<tr><th>If You Want To</th><th>Then</th></tr>
<tr><td>Approve the entire request</td><td>a. In the Comments field, enter comments for the employee or other approvers, if applicable.
b. Click Approve request.</td></tr>
<tr><td>Partially approve a request</td><td>a. Select Review each day individually.
b. From the Actions column, select the appropriate action for each vacation.
c. In the Comments field, enter comments for the employee or other approvers, if applicable.
d. Click Submit.
Result: If no additional approvals are required, the status of the request is Mixed.</td></tr>
<tr><td>Deny the entire request</td><td>a. In the Comments field, enter comments for the employee or other approvers, if applicable.
b. Click Deny request.
c. Click Yes.</td></tr>
</table>
</td></tr>
</table>

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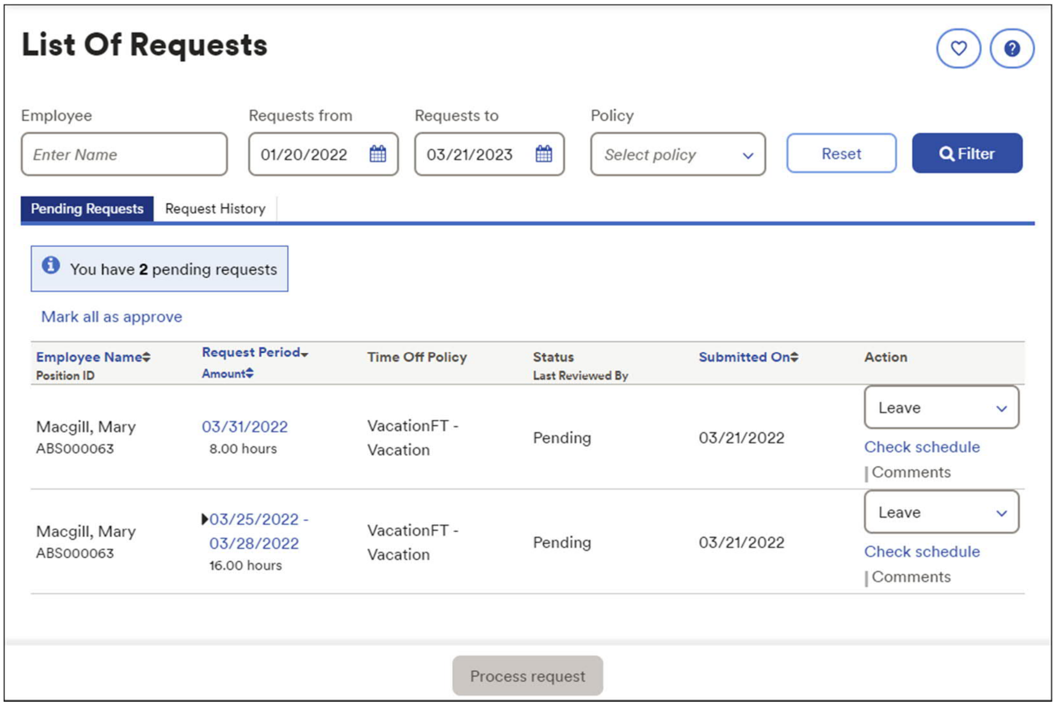
Processing the Request from the List of Requests

Starting Point: My Team > Time Off > List of Requests (manager or supervisor)



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click Check Schedule to see whether other employees have requested time off for the same days as in the current request (if applicable).</td></tr>
<tr><td>2</td><td>

If You Want To	Then
Approve or deny the entire request	Click the field in the Action column and select the appropriate action. Then click Process request.
View the request in detail	Click the date(s) under the Request Period column to access each request, then take the appropriate actions.

</td></tr>
</table>

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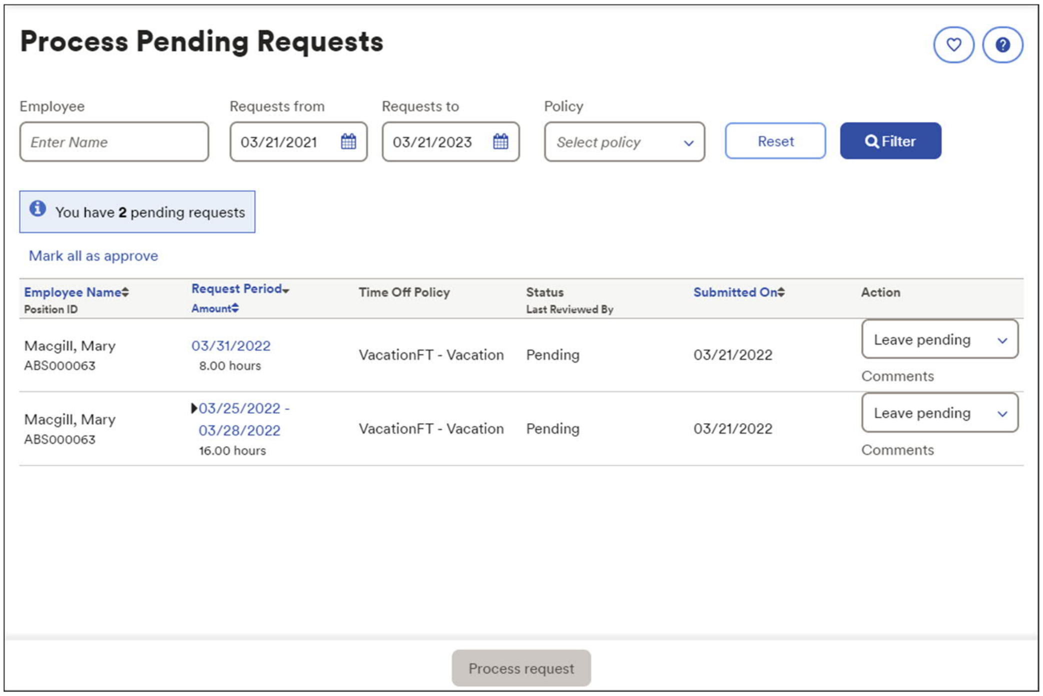
Process Pending Requests Page

The Process Pending Requests page lists the pending time off requests of the employees to whom you have edit access. As a practitioner, you can use this page to respond to one or more requests, including requests that were routed to other reviewers for approval.

Starting Point: Process > Time Off > Process Pending Requests



Canceling and Correcting Time Off Requests

Overview

At times, you may need to cancel time off requests that have been approved. For example, an employee's vacation plans changed, or an employee is released from jury duty earlier than expected. You and your employees can easily cancel approved requests to keep their records and accrual balances accurate. You can correct requests by canceling and re-requesting. This gives an audit trail of all balance transactions.

Policy-Level Settings

Any user can cancel all time off requests for dates in the future without restriction. However, when canceling requests for dates in the past, various date restrictions apply to each type of user. Additionally, at the policy level, you can control whether employees can cancel approved time off requests for dates in the past. You can access this option on the Setup > Time Off > Time Off Policies page by clicking (action) next to a policy and selecting Cancel Request Option. By default, this option is set to No to prevent employees from canceling time off requests that may impact closed payroll periods.

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Rules for Canceling Approved Time Off Requests in the Past

The following table describes the rules for canceling time off requests for dates in the past based on the policy-level settings.

If the User Is a(n)	And the Allow Employees to Cancel Approved Time Off Requests in the Past Option Is Set To	Then the User Can Cancel an Approved Request for Past Dates
Employee who is paid through Payroll	Yes	Up to 60 days prior to the current date
	No	Within the current payroll pay period only
Employee who uses Time & Attendance (and may or may not be paid through Payroll)	Yes	Up to 60 days prior to the current date
	No	Within the current Time & Attendance payroll cycle only
Manager or Time & Attendance supervisor	Not applicable	Up to 60 days prior to the current date
Practitioner	Not applicable	Up to 365 days prior to the current date

Note: On timecards, you can cancel pending requests in the current or next pay period by deleting the rows containing the request and then submit a new request. You cannot edit pending requests for dates beyond the next pay period on timecards. If approved requests require changes, you must cancel the time off request and submit a new one.

Instructions: Cancel and Resubmit a Time Off Request

Starting Point: People > Time Off > List of Requests

Step	Action
1	Click the employee's name.
2	Under the Action column, select Cancel Request. Result: Request Time Off <employee name> slider opens.
3	Enter a reason, if needed, and click Cancel Request.
4	Click Request On Behalf Of. Result: The Time Off Request slider opens.
5	In the Start Date and End Date fields, click (calendar) and select the request dates.
6	Select the correct time off policy and enter the hours per day and start time.
7	Enter comments, if needed.
8	Click Submit.

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When changes are made for dates in previous pay periods, you will be notified automatically in the following ways:

- For employees who do not use Time & Attendance, the time off data will be displayed on the Manage Regular Payroll page under Things to Do > Other Actions section.
- For employees who use Time & Attendance, time off requests that are submitted or canceled for dates in previous pay periods will automatically be displayed as an adjustment on the employees' timecards for the current pay period. The automatic adjustment ensures that the data is included in the payroll with the rest of the employee's timecard data so that the employee is paid correctly, and the employee's time off balances are accurate.

Creating a Time Off Worksheet

Overview: Understanding Time Off Dataflow

The approved time off must be added to a worksheet to correctly pay the employee. The time off dataflow varies based on whether an employee uses Time & Attendance.

The Dataflow to Payroll

The following flowchart illustrates the path of the time off request, beginning with the employee entering a time off request and ending with the data submission to Payroll for processing.

If the employee uses Time & Attendance, the approved time off hours are displayed on the employee's timecard and are included in the payroll when you create a Time & Attendance worksheet.

If you have employees who do not use Time & Attendance or if your entire company does not use Time & Attendance, the approved time off hours must be included in a worksheet. Every pay cycle, you indicate which worksheet will contain the time off data, and the data is automatically populated in the worksheet. The Time Off worksheets include approved time for dates in the current pay period. You then adjust the worksheet and review the entries as usual.

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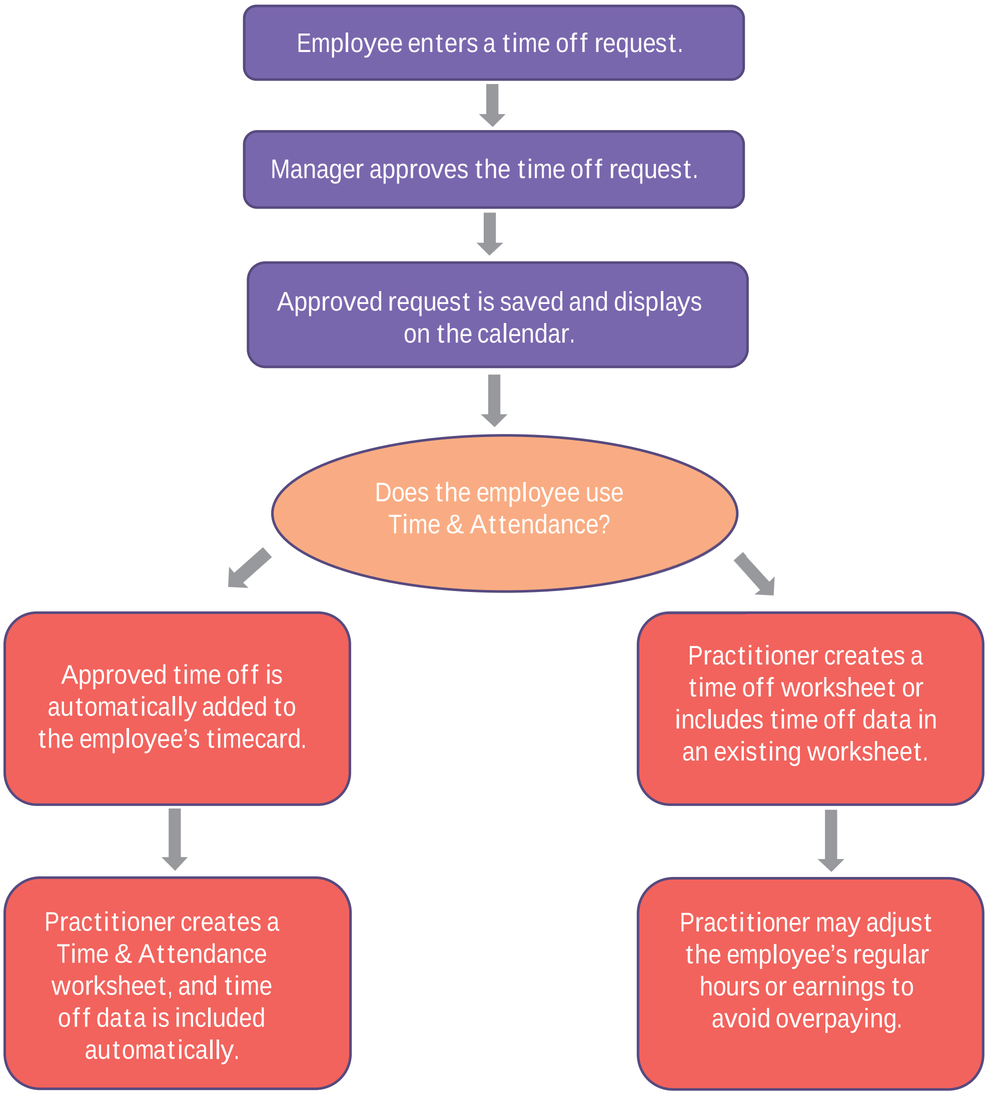
Time Off Flow Chart



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How to Include Time Off Hours in Payroll

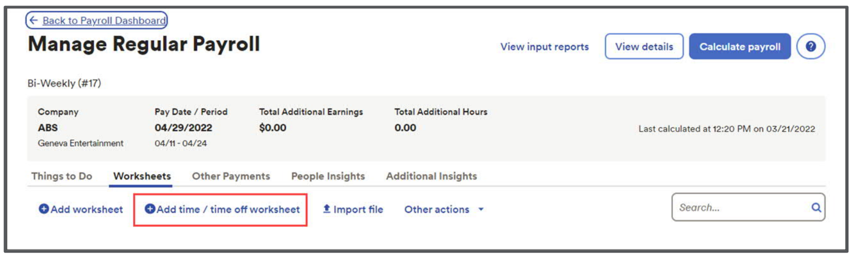
When you create a worksheet for the current payroll, you can include the approved time off hours in an existing worksheet or create a new time off worksheet containing the approved time off hours only. You must complete these steps every pay period.

IMPORTANT: You should not enter time off hours directly into a worksheet for the current payroll. This can create errors in time off balances and make it difficult for you to maintain an accurate record of employee time off requests.

Creating a Time Off Worksheet

Starting Point: Process > Payroll > Payroll Dashboard

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select Manage Payroll for the appropriate open payroll.</td></tr>
<tr><td>2</td><td>Under the Worksheets tab, click Add time / time off worksheet.



</td></tr>
<tr><td>3</td><td>In the Time Off worksheet section, confirm:
Include in worksheet is selected.
The Period Start Date is correct. You can change it if needed.</td></tr>
<tr><td>3</td><td>Indicate where you want to add the Time Off data.
<table>
<tr><th>If You Want To</th><th>Then</th></tr>
<tr><td>Create a new worksheet</td><td>Select Create a new worksheet.
Note: The Worksheet ID and Description are pre-populated. You can change them as desired.</td></tr>
<tr><td>Add the time off data to an existing worksheet</td><td>Select Add to specified worksheet.
In the Worksheet is required drop down, select the existing worksheet.</td></tr>
</table>
</td></tr>
<tr><td>4</td><td>Click Continue to create worksheet.</td></tr>
<tr><td>5</td><td>Confirm your selections, and then click Start.</td></tr>
<tr><td>6</td><td>When processing is complete, click Close.</td></tr>
</table>

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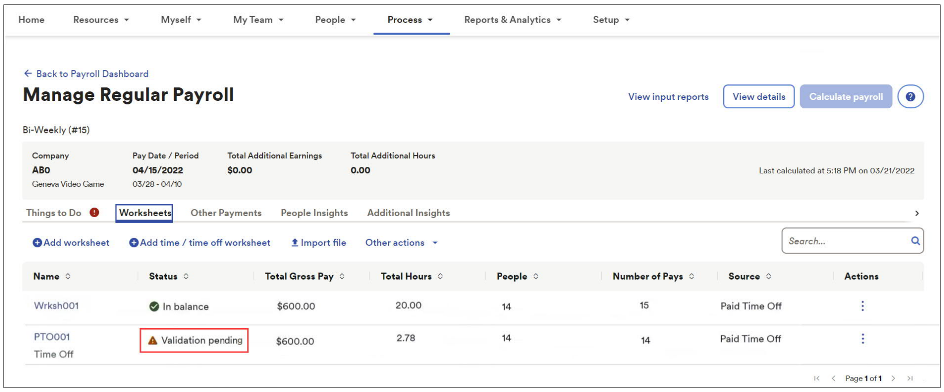
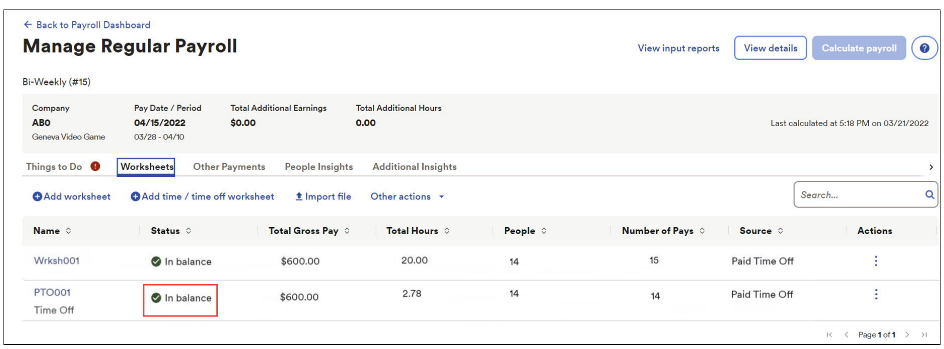
Verifying the Worksheet Details

Overview

Once the Time Off worksheet is created, it is displayed on the Manage Regular Payroll page.

Starting Point: Process > Payroll > Payroll Dashboard

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select Manage Payroll for the appropriate open payroll.</td></tr>
<tr><td>2</td><td>Under the Worksheets tab, open the Time Off worksheet for which validation is pending.

</td></tr>
<tr><td>2</td><td>Adjust any regular hours, if required.</td></tr>
<tr><td>3</td><td>Enter any hours to balance the worksheet, if required.</td></tr>
<tr><td>4</td><td>Click Done.</td></tr>
<tr><td>5</td><td>Click Back to Payroll Dashboard.
Result: The Validation pending warning is no longer displayed in the Status column.

</td></tr>
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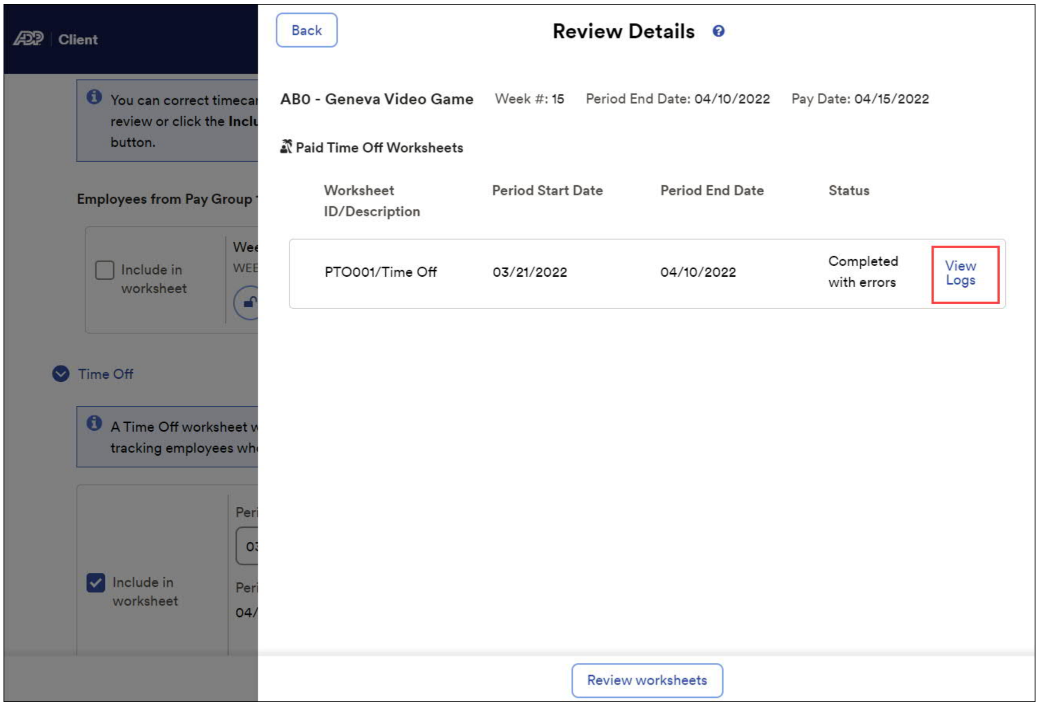
Time Off Warnings

If your company uses Time Off and not all of your employees use Time & Attendance, you must include time off data in your time off worksheet every pay period. The Review Details page includes the View Logs link.



The View Logs page displays time off warnings if any additional time off transactions are not included in the worksheets. This might happen if, after the worksheet was created, time off for days in the current or a previous pay period was approved or canceled.

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How to Include Additional Time Off Requests in a Worksheet

Additional time off transactions are time off requests for the current pay cycle that were approved after a Time Off worksheet was created. You must decide how to process each transaction. These additional time off requests are displayed under the Other Actions section of the Things to Do tab.

Starting Point: Process > Payroll > Payroll Dashboard

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select Manage Payroll for the appropriate open payroll.</td></tr>
<tr><td>2</td><td>Click Things to Do tab.</td></tr>
<tr><td>3</td><td>Select Other Actions.</td></tr>
<tr><td>4</td><td>Click Review for the appropriate Additional time off request.</td></tr>
<tr><td>5</td><td>Select the appropriate option for each additional time off request. You can do this in different ways.
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>The employee is terminated, and the payment will be made through a final settlement.</td><td>Select Accept Warning & Manually update.</td></tr>
<tr><td>You have already balanced the worksheet and you want to wait until the next payroll to include the time off.</td><td>Select Defer to next payroll. You will see the same warning message in the next pay period.</td></tr>
<tr><td>You want to add the transaction automatically to a worksheet or adjust it.</td><td>Select Adjust Amount.

Select the worksheet in which this time off data should be included.</td></tr>
</table>
</td></tr>
<tr><td>6</td><td>Click Next.</td></tr>
</table>

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Time Off Reports

Overview

ADP Workforce Now Time Off provides several reports designed specifically to display time off information such as balances and transactions.

Starting Point: Reports & Analytics > Reports Dashboard > Reports Dashboard > Time/Time Off

Report	Description
Time Off Balance Detail	This report provides the details about the time off activity (earned, taken, or scheduled hours) for each time off policy and the balance for each activity based on a specific period of time. Note: This report replaces the Employee Accrual Detail report and the Time Off Balance and Activity report.
Time Off Balance Summary	This report provides a summary of hours for each policy within a defined time period. Note: This report replaces the Employee Accrual report.
Time Off Policy Assignment	This report provides details about employees' assigned or removed time off policies as of a specific date.
Time Off Request	This report provides details about employees' time off requests for the period requested.

Best Practice

Run the Time Off Request report for the dates in the pay period that you want to process and respond to any pending requests before you create your worksheet to process payroll.

Starting Point: Reports & Analytics > Reports Dashboard > Reports Dashboard > Time/Time Off

Step	Action
1	In the Time/Time Off Reports section, find the Time Off Request report.
2	Click the name of the report or the play icon.
3	Select the desired options. Result: The report status on the Output page is processing.
4	Scroll down and click Run as Excel or Run as PDF. Result: The report status on the Output page is Processing.
5	When the processing is complete, in the row for the report, click ...(action) and select the desired output option.

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Managers and supervisors can access the following time off reports:
Starting Point: Reports & Analytics > Reports Dashboard > Reports Dashboard > Time/Time Off

- My Team Time Off Request
- My Team Time Off Balance Summary
- My Team Time Off Balance Detail+

Accessing Additional Learning Resources

The Bridge

Join TheBridge.adp.com, an online community for payroll and HR professionals where you can ask questions, share knowledge, make connections, and learn from industry experts and peers about a broad range of human capital management topics. Special topics are dedicated to new users of ADP Workforce Now like you.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>
<table>
<tr><th>If You Are</th><th>Then</th></tr>
<tr><td>Logged on to ADP Workforce Now</td><td>At the top of any page, click (The Bridge).</td></tr>
<tr><td>Not logged on to ADP Workforce Now</td><td>Access https://thebridge.adp.com/welcome

Log in using your ADP Workforce Now username and password.</td></tr>
</table>
</td></tr>
<tr><td>2</td><td>To access learning resources that are designed to support you on the topics that you learned about today, first ensure you are logged in to Workforce Now as an administrator, then access the Personalized 1:1 Learning for Workforce Now link on The Bridge.</td></tr>
</table>

Online Help

In your ADP solution, at the top of many pages, you'll see the help and in-product learning options. Click (help) to open online Help, where you can view help content specific to the page that you are on or search for information on any topic.