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Before You Begin

This user guide will demonstrate how to use the time tracking and absence management system through Workday. While this tool is designed to primarily explain system processes, you may have questions regarding time tracking policies or specific absence request procedures within your department. Please consult your direct supervisor or HR Partner on any specific policy questions.

Additional Training Resources

While this guide provides the basic information you need as an employee, we strongly encourage you to review the additional training resources such as Quick Reference Guides and Video Demos available at: https://workday.uchicago.edu/time_absence
**Legend**

The chart below illustrates icons that are used throughout this user guide. The icons serve to call out specific processes, important notes, and training items for you to be aware of.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="light_bulb.png" alt="Light Bulb Icon" /></td>
<td><strong>Notes</strong>: important policy or process steps to be aware of</td>
</tr>
<tr>
<td><img src="recycle_bin.png" alt="Recycle Bin Icon" /></td>
<td><strong>Process</strong>: step by step instructions of system process in Workday</td>
</tr>
<tr>
<td><img src="checkmark.png" alt="Checkmark Icons" /></td>
<td><strong>Objectives</strong>: key concepts that are covered in each chapter</td>
</tr>
<tr>
<td><img src="warning.png" alt="Warning Icon" /></td>
<td><strong>Caution</strong>: note of caution for frequently missed process steps</td>
</tr>
<tr>
<td><img src="person.png" alt="Person Icon" /></td>
<td><strong>Reach Out</strong>: reach out to your supervisor regarding this process</td>
</tr>
</tbody>
</table>
Chapter 1: Introduction to Workday Time and Absence

Objectives
After completing this module, you will be able to—

- State the purpose of Workday.
- Identify your role and responsibilities in using the system.
- Log into and navigate parts of the Workday screen.
- Sign out of the Workday system.

Workday Time and Absence Overview

What is Workday Time and Absence?
Workday is the University of Chicago’s Human Resource Information System (HRIS) that processes the time and absence functions. It is the University’s method for reporting time for all hourly, and biweekly-paid employees. It also allows employees to report absences and request time off in advance.

With the Workday system functionality, you will enter your time on a daily basis either by using a web clock or a swipe clock. If you clock time, your Time Approver will need to approve your time. Once time is approved, the information will be sent to the payroll system to begin processing your paycheck.

If you are a monthly staff employee, you will use Workday to record your absences each month. You will not record your work hours.

All employees who use Workday also have the ability to schedule future absences (e.g., vacation time, personal holidays, etc.) and view work schedules. All employees—biweekly and monthly—can view their time off balances, or accruals, at any time.

Why is Workday Time and Absence Important?
Workday Time and Absence eliminates the separate functionality between payroll and the tracking of time and absence management. This system removes the inefficiencies, complex data integrations, and multiple systems of record for payroll information.

By integrating time tracking and absence management tasks into Workday, this key service incorporates payroll functionality into one system of record while bringing the entire UChicago community an efficient and user-friendly experience.
Benefits to Users

- Provides ability to view and approve time online
- Offers ability to approve vacation and personal holiday time online
- Offers enhanced reporting by
  - displaying accrual balances online
  - tracking patterns of absenteeism
  - tracking types of pay (such as overtime)
  - maintaining equalization of overtime opportunities
- Provides real-time reporting
- Offers self-service features that allow you to
  - check daily entries
  - check available paid time-off balances
  - request vacation and personal holiday time off online
- Directly integrates with payroll module
- Immediately reflects changes to employees record
- Accurately and consistently interprets earnings codes using a rule-based system
- Assists in FMLA compliance
- Provides automatic coding for University holidays

Workday is easy to use. The tasks you perform will depend on your particular position. This user guide will take you through the basic steps needed for employees to use Workday.

**Caution**: It is extremely important that you report your time according to the requirements of your job assignment. Your pay will depend on it!

Your Role and Responsibilities

As a non-academic employee at the University of Chicago, you are responsible for reporting your time using one of the approved methods.

- Most of you will report time by logging into Workday and starting and stopping a web clock.
- Some of you will report time by swiping your University ID card through a time clock swiping device.
- Monthly, non-academic employees will report absences only.

The method you will use depends on your particular position and department. Your supervisor will provide you with directions on which method to use.
Exploring Workday

Logging In

The Workday application requires a computer and access to the internet. You must have a CNetID and password to login.

**Note:** If you do not have a CNetID, you must obtain one. Go to [http://cnet.uchicago.edu](http://cnet.uchicago.edu) and follow the instructions for obtaining a CNetID.

1. Make sure your Browser Supports Workday.

   Contact your local IT help desk or IT Services (773-702-5800) if you have questions about your browser or experience any issues. For Booth School of Business, please contact hr@chicagobooth.edu.

2. Go to [workday.uchicago.edu](http://workday.uchicago.edu)

   ![Workday Login Page](image)

   Click “Log in to Workday” and you will be routed to the login page where you will be using your CNetID and password to access Workday via the Shibboleth portal.

   If you don’t have a CNetID, or can’t remember it, please go to [http://cnet.uchicago.edu](http://cnet.uchicago.edu).
3. Discover Workday@UChicago!

You can use Workday as your single site to manage your time tracking and absence information.

**Note:** After 3 failed attempts to log in, the system will lock your account for a period of up to 30 minutes. Ensure your password is typed correctly after the 2nd log in attempt to avoid a system lockout.
Worklets

Worklets are icons displayed on the homepage that provide access to groups of related tasks, and are used to organize tasks and reports by functional areas.

![Workday Profile](image)

**Workday Profile**

All Workday users will have access to their Workday Profile. This profile can be accessed by logging into the system, and clicking on the “cloud” icon in the upper right hand corner of the screen.

The Workday Profile menu includes:

- **Home**: a link to the homepage in Workday
- **Inbox**: houses all of the tasks of actions assigned, or updates on actions you have taken
- **Notifications**: displays the updates on the action you have taken
- **My Account**: allows you to change the account settings and preferences
- **Sign Out**: Allows you to log off from your Workday account
Notifications
A significant part of using Workday is receiving tasks and items to take action on. Notifications help make you aware of processes as soon as they happen. You can customize the preferences of your notifications within the Workday Profile.

To customize your notification preferences:
1. Click on the Cloud icon in the upper right hand corner, and select My Account.
2. Next, click on Change Preferences.
3. The Preferences screen will display. Adjust the settings according to your preference to either Disable or Enable the various notification types shown.
Workday Inbox
The Workday Inbox is a key feature of Workday and will display tasks or items that require your action. It displays the following tabs:

**Actions**: This tab displays the tasks that require completion. You can complete a task by clicking the Submit button or park it for later action by clicking Save for Later button.

**Archive**: This tab displays the processes that you have previously completed in your archive. At any time, you can identify the status of a process under the Archive tab of your Inbox by finding the task and clicking the Process tab.

Signing Out

1. When you have finished using Workday, always be sure to log out. If you do not log out, another person may knowingly or unknowingly have access to your information and may compromise your recorded time. To sign out, click your name in the upper right corner of the screen and select “Sign Out”.

**Note**: If you do not log out and are not using the application, the system may automatically log you out after a period of inactivity.
Summary
In this module, you were introduced to Workday Time and Absence, the University’s system for reporting time for staff. You should now be able to:

- State the purpose of Workday.
- Identify your role and responsibilities in using the system.
- Log into and navigate parts of the Workday screen.
- Sign out of the Workday system.
Chapter 2: Time Tracking

Objectives
After completing this module, you will be able to:

- Understand the layout of the Time worklet
- Record your daily worked time by using the web clock
- Record your daily worked time by using a time clock swiping device
- View entered time
- View your work schedule

Introduction
Workday allows you to easily record and track your work time via the Time worklet.

- If you are a web clock user, you must start and stop your web clock at the beginning and end of each work session.
- If you are a time clock device user, you must swipe your Chicago Card at the beginning and end of each work session.
- All employees will have the functionality to review their clock data and schedules within Workday.

For bi-weekly employees, it is very important that you record your worked time every day. Clock times are used to determine your pay so that your work record is accurately processed. This will assure you of receiving the correct pay for regular work hours as well as overtime and any premiums.

Reach Out: If you have any questions on using this system, or if you believe your pay check is not accurate, please see your supervisor.
**Time Worklet**
The Time worklet located on the Workday homepage is your main area to complete many activities related to time tracking.

- **Enter Time**: this is where you review entered time, request, and correct time off.

- **View**: this section will allow you to view your schedule, view any time off requested, view your time off balance, and also view your time clock history.

- **Time Clock**: Using the web clock feature, users will Check in and Check out to record their work related activities in this section. Employees who enter time via swipe clock or time sheet will not see the web clock.

---

1. The time clock will only display for web clock users only.
Using the Web Clock
Entering time via the web clock is accessible via the Time worklet in Workday. Review the steps below to utilize the web clock for checking in and checking out for work related activities.

**Note:** This section is only for those bi-weekly employees who use the web clock.

To check in and check out with the web clock:
1. Click on the Time worklet from the Workday homepage

2. Under the Time Clock section, click **Check In** to start the web clock at the beginning of your work period.

3. A pop up window will appear. The details such as Worker name, Date, Time, and Time Zone will auto-populate. Please ensure you fill in the Time Type field with the correct value. Click the Prompt icon to select any other fields that apply.

---

2 If you have multiple positions, please choose the correct position to clock into.
Check In

You are checking in. Please enter your work details or check box to use your previous work details.

Worker
Date 01/02/2018
Time 11:43 AM
Time Zone GMT-06:00 Central Time (Chicago)

Use default values from previous check-in

Time Type
- Marked as Worked Time

Position P9053288 test_job_title

Details
Comment

Caution: If you have multiple positions, it is very important that you select the correct position on this screen. This will ensure you are clocking the correct hours for the specific position you are working that day.

4. A confirmation stating your check in was successful will display along with a time stamp. Click Done to complete the process.
5. The Time Clock section will now display the time checked in.

6. To check out of the web clock at the end of your work period, click **Check Out**.

7. Select a value from the Reason section.
8. A confirmation stating your check out was successful will display along with a timestamp. Click **Done** to complete the process.

9. The Time Clock section will now display the time checked out.

**Reach Out:** If you forget to check in or check out, consult with your Time Approver or HR partner immediately.

**Submit Time**
Bi-weekly workers who enter time via the web clock or timesheet will be able to submit their time entries for approval. Submitting time entries will allow the entered time to be routed to the time approver’s inbox. Workers should check with their supervisor or time approver to review the frequency of how often time should be submitted.

If a worker does not submit their time, it will automatically be submitted through Workday. A mass submission process will run at the end of the payroll period. Time Approvers must make any corrections prior to the end of the pay period.

**To Submit Entered Time:**
1. Click on the Time Worklet
2. Under “Enter Time”, choose from one of the following options:
   a. **This Week**: use this option to display the clock data for the current week
   b. **Last Week**: use this option to display the clock data from the previous week
   c. **Select Week**: use this option to display the clock data from any week by selecting a date from the calendar screen.

   ![Enter Time](image)

3. Your entered time appears on the respective date as time blocks. Click the green **Submit** button to route the time entries to your Time Approver.

4. A verification page will display showing the summarized hours that will be routed for approval. Click **Submit** to confirm the submission.
5. A confirmation page will now display showing your time entry has been submitted. Click **Done** to complete the process.
Using the Time Clock Swiping Device

Some biweekly-paid workers will use a time clock device to record their work hours. Time clock users will swipe their Chicago Cards at designated kiosks at the beginning and end of each work session.

The time clock device consists of a small display area, a keypad, and a slot for sliding your card. The display area shows “University of Chicago” along with the date and time.

**Display Screen**

![Display Screen Image]

**Keypad**

![Keypad Image]

**Note:** This section is only for biweekly workers who use the time clock swiping device.
To clock in using the time clock swiping device:

When you record time via the time clock swiping device, the system records the current time and respective action. Please use the following steps to clock in using the touch screen or keypad:

1. Press the “Clock In” button on the key pad or touch screen

2. The worker will be prompted to “Swipe Your Badge”. The worker will swipe their badge through the magnetic strip reader to the right of the clock.

3. The screen will now display a message stating the workers has successfully clocked in.

4. Please hit the “Enter” button to accept the punch, and return the display back to the main screen otherwise the terminal will time-out automatically in 3 seconds.
To clock out using the time clock swiping device:
When you record time via the time clock swiping device, the system records the current time and respective action. Please use the following steps to clock out using the touch screen or keypad:

1. Press the “Clock Out” button on the keypad or touch screen.

2. The worker will be prompted to “Swipe Your Badge”. The worker will swipe their badge through the magnetic strip reader to the right of the clock.

3. The screen will now display a message stating the worker has successfully clocked out.
4. Please hit the "Enter" button to accept the punch, and return the display back to the main screen otherwise the terminal will time-out automatically in 3 seconds.

If you do not have computer access, please follow your departmental procedures for reporting absences and scheduling future absences such as vacations. See your supervisor for any assistance.
View Entered Time

Whether you use the web clock or a time clock swiping device, you may want to check your clock data for accuracy. The Time worklet provides several options to display a calendar view or a report of your clock data for the time frame you select.

Within the Time worklet is a selection to view Time Clock History. This page displays Unmatched and Matched Clock Events. Every clock event must be paired with a corresponding clock event. For example; anytime an employee clicks “Check-in”, there should always be a matching “Check-out” clock event. Any clock events that are unpaired will display under the Unmatched Clock Events section.

Reach Out: If you have Unmatched Clock Events, contact your Time Approver or HR Partner immediately.

To View Entered Time:

1. Select the Time Worklet.

2. Under “Enter Time”, choose from one of the following options:
   a. This Week: use this option to display the clock data for the current week
   b. Last Week: use this option to display the clock data from the previous week
   c. Select Week: use this option to display the clock data from any week by selecting a date from the calendar screen.
3. Your entered time appears on the respective date as a time block.

Enter My Time

<table>
<thead>
<tr>
<th></th>
<th>Mon 11/6</th>
<th>Tue 11/7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours</td>
<td>7.5</td>
<td>7.5</td>
</tr>
</tbody>
</table>

**Nov 5 – 11, 2017**

- T-Lunch: -5
  - Submitted
- Unmatched Check-out:
  - 2:06pm
  - Needs Attention

**Worked Time**

- 11:00am - 3:00pm (Meal)
- 4 Hours: P9053288 test_job...
- Submitted

- 11:00am - 3:00pm (Meal)
- 4 Hours: P9053288 test_job...
- Submitted
Time Blocks

Time blocks are segmented slots on the calendar that display information about your clock data. The calendar displays time into two halves on the screen; the first half of the screen will display any automatic lunches, vacation, sick, and holiday hours. The bottom half of the screen will display the time blocks of worked time that has been entered.

The following chart will help illustrate what each time block represents:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted</td>
<td>Time block has been submitted to the Time Approver</td>
<td><img src="image1.png" alt="Submitted" /></td>
</tr>
<tr>
<td>Not Submitted</td>
<td>Time block has been created but not submitted to Time Approver</td>
<td><img src="image2.png" alt="Not Submitted" /></td>
</tr>
<tr>
<td>Needs Attention</td>
<td>Time block needs attention; usually displayed in cases of unmatched time blocks</td>
<td><img src="image3.png" alt="Needs Attention" /></td>
</tr>
<tr>
<td>Approved</td>
<td>Time block has been approved by Time Approver</td>
<td><img src="image4.png" alt="Approved" /></td>
</tr>
<tr>
<td>Paid</td>
<td>Time block has been approved and worked time has been paid out</td>
<td><img src="image5.png" alt="Paid" /></td>
</tr>
</tbody>
</table>

You can click on each individual time block to review details for that specific day. Each time block will list three tabs:

- **Reported**: this tab will list the reported quantity, time entry code, as well as the time stamp of the clock data.
- **Calculated**: this tab will show the shift date, calculated date, along with the calculated In and Out and the calculated quantity. Time Calculation Tags will show the pay rates for the time block.
- **History**: this tab will display a chart of the modified moment, the user who modified the record, status, quantity, time entry code, and comments.
If you work on a schedule, you will be given a six minute grace period on either side of your start and end times. For instance, if you are scheduled to work from 8:30 am to 5:00 pm, and you clock in at 8:24 and clock out at 4:54, your work time will still be reported as 8:30 to 5:00.

**Caution:** If you are on an open schedule, you will not have a six minute grace period. Also, on an open schedule, you will have to clock in and out for lunch.

**Note:** You are paid according to the data on the timesheet, not directly off the clock data. There may be slight differences between time shown in the clock data versus the timesheet due to a six minute grace period at the beginning and end of your scheduled work time.
Timesheet Overview
The timesheet will display several key dates and information for all workers and Time Approvers to be aware of.

At the top of the screen, a summary of hours will be displayed.

- **Regular Hours**: displays the total hours entered at the regular base pay rate
- **Overtime**: displays the entered time that qualifies for the overtime pay rate
- **Time Off**: displays the total amount of approved time off
- **Unpaid Time Off**: displays the total hours of unpaid time off for the week
- **Total Time**: displays a subtotal of all regular, overtime, time off, and unpaid time off for the week.

On the calendar, the time blocks are categorized into two halves of the display. On the top half of the calendar, key information displayed will be:

- **Automatic Lunches**: lunches that are automatically inserted into a worker’s schedule
- **Vacation**: any reported vacation requests will display with the total hours and status
- **Sick Leave**: any reported sick leave with the total hours and status
- **Time period Lockout Dates**: the dates for the current pay period to notify the work of the current payroll deadlines
- **Pay Dates**: the scheduled pay date for the current payroll period
- **Adjustments for Rounding**: workers that have fixed schedules and clock times within the grace period allowed will show the rounded difference on as a time block

Oct 22 – 28, 2017

On the bottom half of the calendar, an hourly schedule for each day will show the individual time blocks. Information included here will be:
Time blocks: calculated worked times that display the start and end times, total hours, and status of the entered time. Time blocks are typically color coded to provide the worker with a quick visual to review if their time entry has been approved.

Submit Time
Bi-weekly workers who enter time via the web clock or timesheet will be able to submit their time entries for approval. Submitting time entries will allow the entered time to be routed to the time approver’s inbox. Workers should check with their supervisor or time approver to review the frequency of how often time should be submitted.

To Submit Entered Time:
6. Click on the Time Worklet

7. Under “Enter Time”, choose from one of the following options:
   a. This Week: use this option to display the clock data for the current week
   b. Last Week: use this option to display the clock data from the previous week
   c. Select Week: use this option to display the clock data from any week by selecting a date from the calendar screen.

8. Your entered time appears on the respective date as time blocks. Click the green Submit button to route the time entries to your Time Approver.
9. A verification page will display showing the summarized hours that will be routed for approval. **Click Submit** to confirm the submission.

### Submit Time

You are about to submit time for the week 05/06/2018 - 05/12/2018. Following date range will be submitted for approval.

May 6 - May 12, 2018: 31.816667 Hours Total

<table>
<thead>
<tr>
<th>Time Period Lockout</th>
<th>Mon 5/7</th>
<th>Tue 5/8</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/22/2018 - 05/05/2018</td>
<td>Time Period Lockout</td>
<td>Time Period Lockout</td>
</tr>
<tr>
<td>T-Lunch -1</td>
<td>T-Lunch -1</td>
<td>T-Lunch -1</td>
</tr>
<tr>
<td>☐ Not Submitted</td>
<td>☐ Not Submitted</td>
<td>☐ Not Submitted</td>
</tr>
</tbody>
</table>

### Total for May 6 - May 12, 2018

- Regular Hours: 27.816667
- Overtime: 0
- Time Off: 0
- Unpaid Time Off: 0
- Total Time: 27.816667

**Enter your comment**

**Submit**  **Cancel**
10. A confirmation page will now display showing your time entry has been submitted. **Click Done** to complete the process.

View Time Clock History

Another area where you can view your entered time is under the “**Time Clock History**” section. This area will display the entered time in an exportable chart format. You can choose to view the **Previous Week**, **Next Week**, or choose **View My Calendar** to display entered time for a specific time frame.

These sections display data including the entered Check-in and Check-out event, day of the week, date, time, time zone, and time block.

**To View Time Clock History:**

1. Select the **Time** Worklet.

2. Under the “View” section, choose **Time Clock History**:
3. You can now view the clock data for the current week. Click on **Previous Week**, **Next Week**, or **View My Calendar** to display clock data for various time ranges.

### My Time Clock History

<table>
<thead>
<tr>
<th>Unmatched Clock Events</th>
<th>1 item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clock Event</td>
<td>Day of the Week</td>
</tr>
<tr>
<td>Check-in</td>
<td>Tuesday</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Matched Clock Events</th>
<th>0 items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clock Event</td>
<td>Day of the Week</td>
</tr>
</tbody>
</table>

**Reach Out:** If you have **Unmatched Clock Events**, contact your **Time Approver** or **HR Partner** immediately.

### Viewing Your Work Schedule

You can view your work schedule in a calendar format. The calendar shows you which days have already been scheduled as work days, off days, absences, and holidays.

**To View your Work Schedule:**

1. Click the **Time** worklet

2. Under the **View** section, click on **My Schedule**
3. The calendar will display with your work schedule listed on each date.

<table>
<thead>
<tr>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>13</td>
<td>14</td>
<td>15</td>
<td>16</td>
</tr>
<tr>
<td><img src="image" alt="Schedule" /></td>
<td><img src="image" alt="Schedule" /></td>
<td><img src="image" alt="Schedule" /></td>
<td><img src="image" alt="Schedule" /></td>
<td><img src="image" alt="Schedule" /></td>
</tr>
</tbody>
</table>

**Note:** If you have multiple work schedules, the calendar will display the various schedules automatically.
Summary
In this module you learned how to—

- Understand the layout of the Time worklet
- Record your daily worked time by using the web clock
- Record your daily worked time by using a time clock swiping device
- View entered time
- View your work schedule
Chapter 3: Absence Management

Objectives
In this section, we will review how employees request time off and manage their absences. After completing this module, you will be able to—

- Understand the layout of the Time Off worklet
- Report and request time off
- View your accrued time off balance
- View pending time off requests
- Submitting a Monthly Confirmation Report
- Cancel a request for time off

Introduction
Workday allows you to easily report absences and request time off via the **Time Off** worklet. Absences are any normally scheduled work days on which you did not report to work. If you are a permanent biweekly employee, you must schedule or report all absences in order to get paid.

3 For monthly employees only
Time Off Worklet
The Time Off worklet located on the Workday homepage is your main area to complete activities related to reporting absences and requesting time off.

When you click on the Time Off worklet, there are three main areas to review:

- **Request**: this section is where staff can report absences and request scheduled time off
- **View**: this section is where staff can review any input time off, balances, and time off results by period
- **Available Balance as of Today**: this section provides a quick view summary of accrued hours
Reporting Time Off

If you miss scheduled work days because of illness or another reason, you will need to report these absences as time off. In most cases unscheduled absences will be for unforeseen sick time and emergencies. Unpaid absence times will reduce pay for that period. Other absences such as vacations and personal holidays should be scheduled in advance.

Time is accrued differently for benefits eligible employees, student employees, non-benefits eligible, temporary, and seasonal staff. Absence requests will not expire and remain in the Time Approvers queue till it is approved.

For a full description of the time off policies, please visit the HR Policies and Contracts site at: http://humanresources.uchicago.edu/fpg/policies/index.shtml

Reach Out: Consult with your manager on any questions about scheduled time off to ensure proper coverage for your team.

Note: Only full-day absences should be reported for exempt workers.

Absence types may include:

- Active Duty Pay
- Banked Holiday
- Bereavement Leave
- Jury Duty
- Military Reserve/ Leave- Paid
- Military Reserve/ Leave- Unpaid
- Other Absences- Paid
- Personal Holidays
- Personal Holidays FMLA
- Sick Leave
- Sick Leave FMLA
- Suspension- Paid
- Union Related – Paid
- Unpaid Time Off
- Vacation
- Vacation FMLA
- Vacation Paid in Advance
- Voting
To report time off:

1. Click on the **Time Off** worklet

2. Under the **Request** section, click **Time Off**

3. On the calendar display, click on the individual dates that you are reporting as absences. The selected calendar dates will turn blue.

**Note:** To choose multiple days in a row, you can click and drag your mouse across several dates. You can also hold down the Control (Windows)/Command (Mac) button and click to select multiple days that are not in sequential order.
4. Click the green button titled **Request Time Off** located in the bottom left-hand corner of the screen. The button will automatically calculate the number of days selected. (For example: If 5 days are selected, the button will read “5 Days- Request Time Off”)

5. Fill in the **Type** field from the list of absences described above, along with the **Daily Quantity** field with the number of hours you are reporting as absences. For multiple days, indicate the daily quantity instead of the total work hours.

Enter time in as decimals instead of the hour and minute format. All time must be entered in increments of 0.50. (Ex: If 5 days off are requested, instead of populating 40 hours of total time requested, a default value of 8 will populate in the Daily Quantity field.)
Note: The Daily Quantity field will default to your daily scheduled work hours. You can adjust the quantity as needed.

Request Time Off

When
Monday, December 18, 2017 - Friday, December 22, 2017

Type

Daily Quantity

Unit of Time
(empty)

Comment

6. Click Submit when complete.

Paid Time Off Balance Awards
Paid absences are available to eligible employees according to their accrued time. At the University of Chicago, employees can accrue paid time off in three banks:

- Sick Leave
- Vacation
- Personal holidays

Accruals, or your time off balance, are automatically calculated by Workday based on your employment history. They are awarded at the end of the month. If payroll closes prior to the end of the month, your balance will be viewable. Employees that accrue time on a biweekly basis will accrue time every two weeks along with the payroll calendar.

You will be able to view the vacation and sick accrual awards in the Time Off worklet. In addition, on January 1, April 1, July 1, and September 1, you will also see a personal holiday award appear on your available balance if eligible. Once the hours are awarded, your accrual balance will be updated to reflect the earned time.

4 Check the payroll calendar for the most up to date pay periods: http://finserv.uchicago.edu/sites/finserv.uchicago.edu/files/uploads/Documents/pdf/2018_Payroll_Calendar.pdf
Viewing Time Off Balance

Paid absences are available to you according to your accrued time or as described by University policy (for example, jury duty).

Viewing your time off balance, or accruals, allows you to see how many days are available to you for vacation, personal holidays, and sick time. You should check your available accruals before requesting time off. To view your accruals, simply click on the Time Off worklet, and view the section titled Available Balance as of Today which will provide a summary of the accrued hours as of the current date. You can also view a detailed report of your accruals using the Time Off Balance with Cap report.

To View Time Off Balance:
1. View and Select Time Off worklet from your home page.
2. Under the **View** column, click on **Time Off Balance with Cap**.

3. Populate the **Effective as of Date** if needed and click **OK**.

4. The page will display a chart with the accrued balance for each of the Time Off plans including Banked Holiday, Sick Leave, Vacation, and Personal Holidays for benefits eligible staff.
Partial Day Absences
For employees that must report absences by the hour, the same steps to request time off should be followed. When inputting the time in the Daily Quantity field, input the specific time in increments of .50 to report/request a partial absence.

Note: Represented workers should refer to their Collective Bargaining Agreements to confirm whether they are permitted to request partial day absences.

To request a partial absence:
1. Open the Time Off worklet
2. Under the Review section, click Time Off.
3. The monthly calendar will now display. Click on the day you are requesting a partial absence for. Upon confirmation of the selection, the date will turn blue.

http://humanresources.uchicago.edu/fpg/policies/index.shtml
4. Click the green button titled Request Time Off located in the bottom left-hand corner of the screen. The button will automatically calculate the number of days selected. (For example: If 5 days are selected, the button will read “5 Days- Request Time Off”)

5. A pop up window will open up. Fill in the “Type” field with the type of absence request (sick leave, vacation, etc.) and the numerical value of the hours in the “Daily Quantity” field. Click Submit when complete.

💡 **Note:** The Daily Quantity must be in increments of 0.50 Hours
6. Once submitted, the partial absence request will display on the calendar with the absence type titled as a gray time block.
7. Double click the gray time block to view details of the request, and to cancel the request if necessary.

8. If the request is approved, the time block will display on the calendar with a green check mark.
Splitting a Day into Two Absence Types

It is possible to split a day into two types of absences. This might be useful when you have less than a full day accrual of one type of absence such as sick leave, and you want to use another absence, such as vacation time, to cover the rest of the day.

To split a day into two absence types, simply report two absences for the same day using two different time off request types. Be sure to perform this procedure before you submit the Monthly Confirmation Report.

To split a day into two absence types:
1. Open the Time Off worklet

2. Under the Review section, click Time Off.

---

Available Balance as of Today

Does not include future time off requests

- 0 Hours - Banked Holiday
- 0.884 Hours - Sick Leave
- 16.45 Hours - Vacation
- 7.5 Hours - Personal Holidays
3. The monthly calendar will now display. Click on the day you are splitting an absence for. The selection date you choose will turn blue.

<table>
<thead>
<tr>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
</tr>
</thead>
<tbody>
<tr>
<td>26</td>
<td>27</td>
<td>28</td>
</tr>
<tr>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>10</td>
<td>11</td>
<td>12</td>
</tr>
</tbody>
</table>
4. Click the green **Request Time Off** button in the bottom left hand corner.
5. A pop up window will display the **Request Time Off** details. Fill in the “Type” field with the type of absence request (sick leave, vacation, etc) and the numerical value of the hours requested in the “Daily Quantity” field. Click **Submit** when complete.

**Note:** *The Daily Quantity must be in increments of 0.50 Hours*

![Request Time Off form](image)

**When**
Monday, December 11, 2017

**Type**
- Sick Leave

**Daily Quantity**
0.5

**Unit of Time**
Hours

**Comment**

**Submit**

**Cancel**
6. Next, click on the same day and click the green **Request Time Off** button in the bottom left hand corner.
7. In the **Request Time Off** details, enter in another absence type, such as “**Vacation**”, in the **Type** field. Enter in the **Daily Quantity** requested and click **Submit** when complete.
8. Once submitted, the partial absence request will display on the calendar with the absence type titled as a gray time block.
9. Double click the gray time block to view details of the request, and to cancel the request if necessary.

10. If the request is approved, the time block will display on the calendar with a green check mark.
Requesting a Vacation Pay Advance

Some employees who are on a fixed schedule (all full-time biweekly employees except those in the Actor’s Equity Association and United Scenic Artists) are permitted to request and receive an advance on their vacation pay before taking the actual vacation time. If you receive an advance for vacation days, you will not be paid during the actual days you take.

To request this option, choose the Time Off type: **Vacation Paid in Advance** when requesting time off. This will route the request to your Time Approver. Once approved, the request will be sent to payroll for processing.

You can only request a vacation advance for five consecutive days or more. You must request the vacation advance at least ten days before the actual vacation.

A notification with the request will be sent to the Payroll Department. You will receive a check for the advance amount prior to the beginning of your vacation.

**Monthly Confirmation Report**

Exempt employees must report all absences taken in a month, or confirm that no absences were taken during the month. University holidays will appear automatically on your Monthly Confirmation Report. The process for reporting monthly absences is similar to requesting any other type of time off, however certain time types will be selected to confirm if no absences were taken.

**Note:** This process is for exempt employees only.

**To submit a Monthly Confirmation Report:**

1. Click on the **Time Off** worklet

2. Under the “**Request**” section, click **Time Off**
3. Once the calendar displays, click an individual date to request time off. This is where you will be able to report your monthly confirmation of absences. The selected calendar date will turn blue.
4. Click the green button titled **Request Time Off** located in the bottom left-hand corner of the screen. The button will automatically calculate the number of days selected. (For example: If 5 days are selected, the button will read "5 Days - Request Time Off")
5. Fill in the **Type** field with the selection of **Monthly Time Off Confirmation**. Fill in the **Reason** field with the selection “Select this to confirm all time off requests have been submitted for this month.” The **Daily Quantity** field should default to 1.

Click **Submit** when complete.
Viewing Pending Time Off Requests

Workday allows you to check the status of any requested time off as well as the balances you have accrued to date. You can view this information through the Time Off worklet.

To view your Time Off Requests and Time Off Balances as of Current Date:
1. Click the Time Off worklet

2. Under the View section, click on My Time Off

3. All requested time off will display. The following data will display:

<table>
<thead>
<tr>
<th>Date</th>
<th>Day of the Week</th>
<th>Type</th>
<th>Requested</th>
<th>Unit of Time</th>
<th>Comment</th>
<th>Status</th>
<th>Time Off Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/29/2017</td>
<td>Friday</td>
<td>Sick Leave</td>
<td>8</td>
<td>Hours</td>
<td></td>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td>12/20/2017</td>
<td>Wednesday</td>
<td>Vacation</td>
<td>8</td>
<td>Hours</td>
<td>Enjoying holidays</td>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td>12/19/2017</td>
<td>Tuesday</td>
<td>Vacation</td>
<td>8</td>
<td>Hours</td>
<td>Test</td>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td>12/19/2017</td>
<td>Tuesday</td>
<td>Vacation</td>
<td>-8</td>
<td>Hours</td>
<td></td>
<td>Submitted</td>
<td></td>
</tr>
</tbody>
</table>
4. Click on the **Time Off Balances as of Current Date** tab to review the accruals based on the specific time off plan.
Cancel Requested Time Off

If you should report an absence by mistake and want to remove it, you may do so as long as the request has not been approved. If it has already been approved, you must ask your Time Approver to make the correction.

To cancel a requested time off:
1. Click the Time Off worklet

2. Under the Request column, click Time Off

3. Click on the time block listed in the date you are planning to delete.

Note: You may only cancel a request for time off as long as it has not been approved. If the absence request has been approved, please see your Time Approver to complete the correction.
4. Click **“Cancel this Request”** to delete the request.

**Time Off Entry**

- **When**: Monday, December 11, 2017
- **Type**: Vacation
- **Requested**: 7.5 Hours
- **Initiated On**: 12/13/2017 10:18 AM
- **Time Off Event**: Time Off Request: 
- **Comment**: (empty)

[Button] Cancel this Request
5. The **Cancel Business Process Time Off Request** window will display. Review all of the details prior to cancelling the request.

**Click Submit** when you are ready to cancel your absence request.
Reports
Reports are housed within worklets in Workday. Several commonly accessed reports are listed within the **Time** and **Time Off** worklet so workers can easily see important data. Listed below are some of the common reports that can be accessed for staff.

- **RPT- Worker’s Time Approver and HR Partner**
  - Workers can use this report to view the name of their Time Approver and HR Partner. If a worker has multiple positions, the respective Time Approver and HR Partner will be listed in the same line item.

- **RPT- Worker’s Time Off Balance with Cap**
  - Workers can use this report to quickly view their accrued time off balances, along with the maximum amount that can accrue to help determine how close they are to reaching the limit.
Summary
In this module you learned how to—

- Understand the layout of the Time Off worklet
- Report and request time off
- View your accrued time off balance
- View pending time off requests
- Submitting a Monthly Confirmation Report
- Cancel a request for time off

For Further Assistance
You have come to the end of this training and should be ready to use the Workday Time and Absence functions. If you need any further assistance, please review the additional training resources at: https://workday.uchicago.edu/page/resources-and-training

6 For monthly employees only
Appendix A: Resources

**University of Chicago Workday website:**
https://workday.uchicago.edu/

**Workday Login page:**
https://wd5.myworkday.com/uchicago/login.flex

**Workday Support email:**
workdaysupport@uchicago.edu

**HR Policies**
https://humanresources.uchicago.edu/fpg/policies/index.shtml

**Employee Handbook**
https://humanresources.uchicago.edu/fpg/handbook/2017-08-17%20Employee%20Handbook.pdf

**FOR ASSISTANCE CONTACT:**
Shared Services Office: Service Desk
Submit your question [here](#)

Call 773-702-5800, M-F 8am – 5pm