Insperity®

Requests - User Guide

Reference Guide for Time & Attendance Users

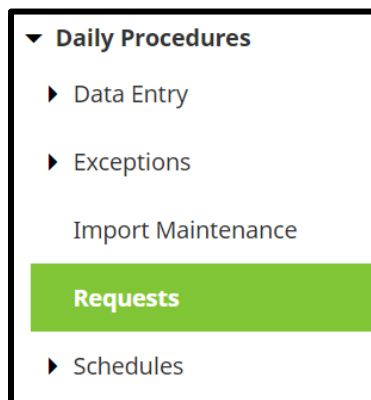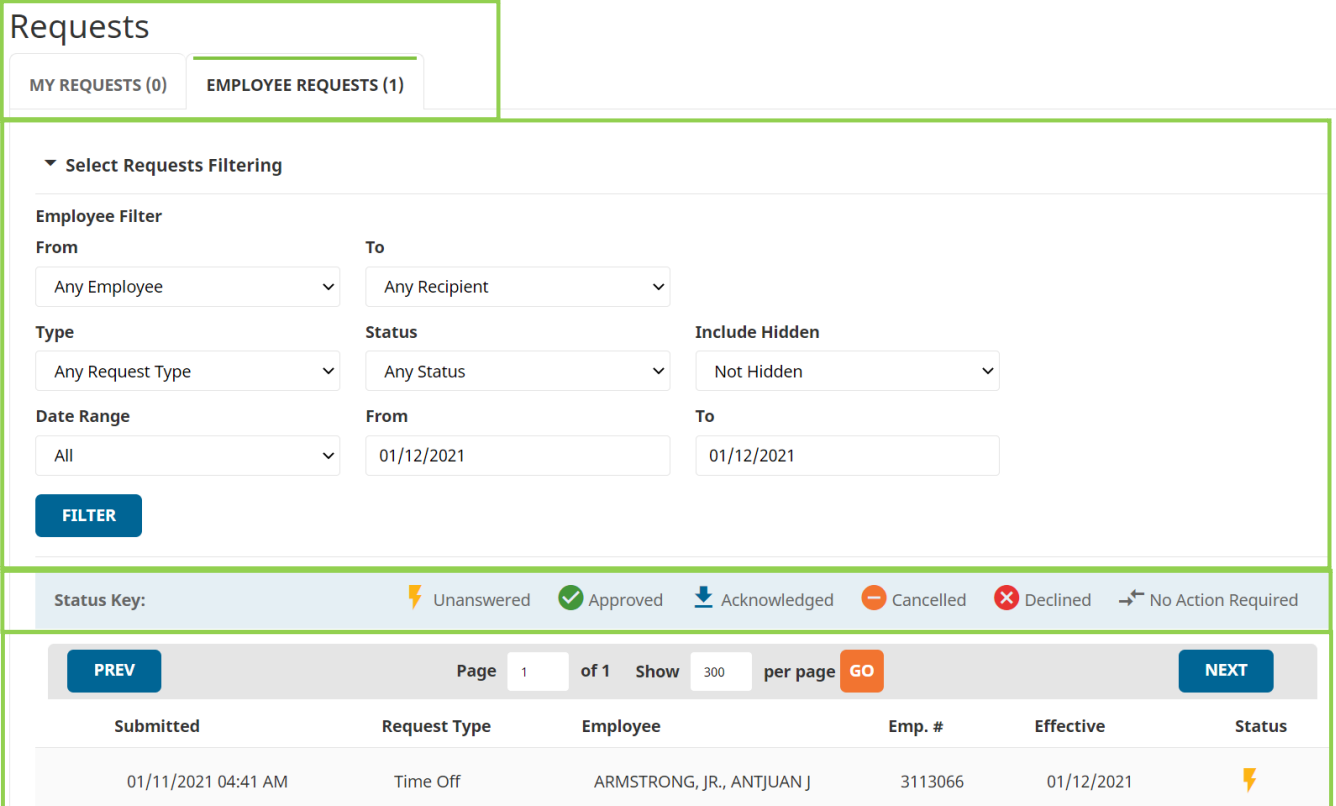# Contents

Introduction

The Requests page in Time and Attendance is used to send and receive Time Off, General, Missing Punch, Message, and Schedule Change requests. Access to each option is dependent on company set up and individual security.

Navigating to the Requests Page

1. In the **Main Navigation** menu, open the **Daily Procedures** folder.
2. Click on the **Requests** page.

Reviewing the Requests Page

1. **Page Selection Tabs**
   a. **My Requests** – View requests that you have sent and send new requests
   b. **Employee Requests** – View requests that your employees have sent
      i. Depending on company setup, a Time and Attendance administrator may have access to see and act upon all requests sent in the system.
2. **Select Requests Filtering** – Filters the data on the page to a specified subset of information. To set a filter, select filter option(s) and click the **Filter** button. Filtering options are below:
   a. **From** – Employee who sent the request
   b. **To** – Supervisor for whom the request was sent
   c. **Status/Type Filter**
      i. First drop down – Type of request
      ii. Second drop down – Status of request
      iii. Third drop down – Hidden or not hidden requests
   d. **View Range –** Preset date ranges, or place in a start and end date within which the request was sent

3. Status Key – Defines request statuses
    a. **Unanswered** – Request has not yet received a response
    b. **Approved** – Request was approved by the supervisor
    c. **Acknowledged** – General request was acknowledged by the supervisor
    d. **Cancelled** – Request was cancelled by the sender
    e. **Declined** – Request was declined by the supervisor
    f. **No Action Required** – No action is needed on the request
4. Requests – Displays all of the sent requests on the My Requests tab and all of the received requests from the Employee Requests tab. For definitions of each field, see the section titled "Request Detail Definitions."

Request Detail Definitions

Below is a list of the fields in alphabetical order that may be seen on the main Requests page, or within the Detail View pop-up window when sending or receiving a request. Access to these fields is dependent on company specific set up and individual security.

1. **Actual Date/Time** – Date and time of the request
    a. The date can be selected via the pop-up calendar or typed. The time must be typed.
2. 📅**Calendar** – Launches the Time Off Calendar. It is located at the top right of the Detail View
3. **Date** – Date(s) of time off
4. **Employee –** Employee who sent the request
5. **Emp. #** – Employee number
6. **Effective** – Dates requested (dates for time off, dates to change the schedule, or dates to fix a missing punch)
    a. If the requests span multiple days, a [+ <number of days>] will appear beside the effective date
7. **Hours/Minutes** – Total hours/minutes of time off per day
    a. **Accrual Balance** – If the Pay Type selected is attached to accruals, a running balance will display in this column adjacent to the hours/minutes. Hover over the amount to see the accrual plan, committed balance, and running balance.
8. **Organization Level** – Organization level items assigned to a punch record
9. **Pay Type** – Pay Type in which time off or a punch will be applied
10. **Punch Type –** Type of punch
    a. **IND –** In For Day
        i. Used at the start of the work day
    b. **INL –** In From Lunch
        i. Used when coming back from a lunch break

    c. **INB –** In From Break

       i. Used when coming back from a break

    d. **IDA –** In For Day Again

       i. Used when coming back from something else (ex. A doctor's appointment)

    e. **INS –** In From Split

       i. An automatic punch that appears when worked hours are split at midnight

    f. **TXO –** Transfer Punch

       i. Used to allocate worked hours to specific organization level items

    g. **ALO –** Auto Lunch Override

       i. Used to override an automatic lunch

    h. **CBI –** Call Back In

       i. Used when called back in from work

    i. **OUT –** Out

       i. Used any time work is stopped

11. **Request Type –** Type of request. Includes: Time Off & Punch.

12. **Scheduling –** Updates an assigned schedule with details of the time off

    a. **All Day –** Blocks the entire day

    b. **Cancel Shift –** Cancels the assigned shift for the day

    c. **Partial Day –** Allows the user to place in a time that starts the time off

13. **Status –** Status of the request

    a. Hover over the status to see its definition. Statuses are also defined under item number 3 in section "Reviewing the Timesheet Page."

14. **Submitted –** Date and time of request submission

15. **Total Time Calculation** – Automatic calculation of the total projected work hours for a schedule

16. **Delete** – Delete a line of data

Sending Requests

An employee can send requests for any current or future pay period through the Time and Attendance system. These requests can be received by one or more supervisors or administrators and approved, declined, or acknowledged. There are five types of requests: General Requests, Time Off Requests, (Missing) Punch Requests, Schedule Change requests, and Messages. The process for sending each request type is outlined in this section.

Sending a Time Off Request

A time off request allows an employee to request time off through the Time and Attendance system. An acceptance of the request will automatically update the employee's timesheet with the time off. To send a time off request:

1. Click the **New Request** button, located at the bottom of the page.

   A list of available request options opens.
2. Select **Time Off Request**.

   A Detail View pop-up window opens.
3. Select the person for whom to send the request in the **Send Request To:** drop down.
4. Click the **Plus** button located at the right of the **Requested Date(s)** section.

   An Add Dates pop-up window opens.
5. Fill in the fields in the **Add Dates** pop-up window.
   a. **Hours/Minutes** – Total hours and minutes per day of time off
   b. **Pay Type –** Pay Type in which to apply the time off
   c. **Calendar –** Dates of time off
       i. Dates will turn orange once selected. Selecting multiple dates can be done in either of the two following ways:
           1. Hold down left mouse button and drag the pointer across the dates. Release the mouse button once all days are selected.
           2. Hold down the control button on the keyboard, and click each individual date.
       ii. It is recommended to place separate time off requests for each separate block of time off.
       iii. Select scheduled work days only. For example, if an employee typically does not work on weekends, that employee should not select the weekend when requesting time off that spans multiple weeks.
6. Click **Add Dates**.

   The Detail View window remains open to review the data prior to submission. If the request will lead to a negative balance, a message will appear. Should the company allow a negative balance, this message can be accepted through; otherwise, the user must adjust the request prior to the next step.
7. Review the data on the **Detail View** and make any adjustments to each individual day as necessary. For definitions of each field, see the section titled "Request Detail Definitions."
8. Place a comment in the **Comment** field if necessary.
9. Click **Submit Request**.

Sending a Missing Punch Request

A missing punch request allows an employee to send a punch to their supervisor or administrator that they had missed. An acceptance of the request will place the punch in to the timesheet, cleaning up the critical Missing Punch alerts. For additional information on Missing Punches, including how to send a Missing Punch Request from the Punches page, see the section "Fixing a Missing Punch" within the User "Punches" User Guide.

To send a missing punch request from the Requests page, follow the below steps:

1. Click the **New Request** button, located at the bottom of the page.

   NEW REQUEST

   A list of available request options opens.
2. Select **Punch Request**.

   A Detail View pop-up window opens.
3. Select the person for whom to send the request in the **Send Request To** drop down.
4. Fill in the details of the would-be punch in the Punch section of the request. For definitions of each field, see the section titled "Request Detail Definitions."
5. Place a comment in the **Comment** field if necessary.
6. Click **Submit Request**.

Canceling or Withdrawing a Request

Once a user has sent a request, they may wish to make a correction to the request or remove it completely. To remove a sent request, follow the below steps:

1. Click on the line of the request to remove in the main requests area.

   A Detail View pop-up window opens.
2. Locate the button at the bottom of the request Detail View. The button will either display the option to **Withdraw Request** or **Cancel Request**. These options and steps to complete the removal of the request are below:
   a. **Withdraw Request** – Removes a request that has not yet been approved/declined/acknowledged by the person receiving the request.
      i. Click **Withdraw Request**.
   b. **Cancel Request** – Removes a request that has been approved/declined/acknowledged by the person receiving the request. This action requires a supervisor or administrator to approve or decline the removal.
      i. Click **Cancel Request**.

         A message will appear noting that the request may only be cancelled in its entirety.

> **ii.** Click **Submit Cancellation Request**.

Receiving a Request

A supervisor or administrator may receive a Time Off, Punch, Schedule Change, General Request, or Message from their employee that will require a response. This section will explain how to know a request was received, as well as how to respond to a request.

Request Notification Methods

A user will be notified that a request has been sent to them through one or all of the following methods, depending on the company set up:

1. **E-mail** – An e-mail will be sent notifying the user that a request has been sent to them. The data that appears in the request is dependent on the company set up, as well as the type of request that was sent. The user may be able to respond to the request by using buttons within the e-mail; otherwise, they must log in to the Time and Attendance system to respond.

2. **Time and Attendance Bubble Notification** – The blue bubble at the top left of the Time and Attendance system contains a number counter that will increase when a request is received.

3. **Approval Error** – Requests must have a response for a timesheet to be successfully approved. Should there be an outstanding request within the pay period being approved, an error will appear reminding the user to respond to the request.

Responding to a Request

To respond to a request, follow the below steps:

1. Go to the **Employee Requests** tab, located at the top of the Requests page.

MY REQUESTS (0)	**EMPLOYEE REQUESTS (1)**

2. Click on the line of the request that requires a response. Any unanswered requests will have an "Unanswered" status in the far right column.

3. Review and adjust the information contained in the request as necessary. For definitions of each field, see the section titled "Request Detail Definitions."

4. Place a written response in the **Response** field if necessary.

5. Select the action to take on the request using the buttons at the bottom of the Detail View pop-up window. Options include:

   a. **Acknowledge** – Acknowledges the request, notifies the employee, and updates the request status to "Acknowledged".

b. **Approve Request** – Approves the request, notifies the employee, and updates the request status to "Approved". An approval will update the system in various ways, dependent on the type of request. The result of each request type approval is below:

    i. **Time Off Request** – Places the data into the timesheet, deducts from accruals when accruals are linked, and updates the schedule if schedules are activated and attached.

    ii. **Punch Request** – Places the punch from the request into the timesheet and removes the Missing Punch error.

c. **Decline Request** – Declines the request, notifies the employee, and updates the request status to "Declined".

d. **Recommend Approval of Request** – Sends the request to next approver in an established hierarchy and updates the previous responses with a recommendation of approval when a Request Workflow is in place for the company.

e. **Recommend Denial of Request** – Sends the request to next approver in an established hierarchy and updates the previous responses with a recommendation of denial when a Request Workflow is in place for the company.

If the request leads to a negative balance, a message will appear. Should the company allow a negative balance, this message can be accepted through; otherwise, the user must adjust the request before the request can be approved.

Frequently Asked Questions

Why don't I have a New Request button?

A user must have a supervisor assigned to be able to send a request. Contact your System Administrator if this occurs.

How do I fix or delete a part of a request that I have already sent?

An adjustment to a previously sent request must be withdrawn or cancelled in its entirety. These steps are detailed in the "Canceling or Withdrawing a Request" section.

If the user has direct access to the page that is updated as a result of an accepted request, the adjustments can be made there directly. See the "Where do I go to fix a request that I have already accepted?" Frequently Asked Question for more details.

Where do I go to fix a request that I have already approved?

An approved request that must be adjusted can be edited on the page that is updated as a result of its approval. Please see below for additional information based on request type:

- **Punch Request** – To delete/edit a punch placed in the timesheet as a result of an approved Punch Request, use the Punches page. Detail on the Punches page can be found in the "Punches" User Guide.
- **Time Off Request** – To delete/edit time off placed in the timesheet as a result of an approved Time Off Request, use the Hours page. Detail on the Hours page can be found in the "Hours" User Guide.

How do I hide a request from my Requests page?

A request can be hidden the My Requests tab by using the check box adjacent to the line of the request to be hidden. Once checked, click the **Hide Request** button located at the bottom of the Requests screen.

A request will often be removed automatically from the Employee Requests tab by taking action on the request itself unless the **Automatically hide request on approve/decline action** option is set to "No" in the Detail View pop-up window.

To show a hidden request, update the **Status/Type Filter** to "Including Hidden."

How do I pare down the list of requests on my screen?

A user may set a filter to shorten the list of requests that appear on their My Requests or Employee Requests tabs of the Requests page. To learn more about filters, refer to number 2, "Select Requests Filtering" within the section titled "Reviewing the Requests Page."