Add New Leave Cases via Employee Search

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Use the Employee Search icon on the Home Page to locate an employee who is opening a leave case.

Navigation: Home Page > Employee Search

1. On the **Employee Search** panel, identify an employee by entering their name or ID number. (Optional) Use Advanced Settings to narrow the search. You can select a specific time frame or choose to include all employees or active employees only in the search.
1. Select **Search**.
2. From the **Search Results**, select the checkbox beside the employee who is opening a new leave case.
3. Select **Go To** and then from the drop-down list, select **Leave of Absence Case Editor**. The **Leave of Absence Case Editor** opens, with the selected employee's name visible in the **Add New Case** panel.
4. Complete the details in the **Add New Case** panel.

Complete the Add New Case Panel for a Leave of Absence

To open an employee leave of absence case, the manager or leave administrator must create a new leave case in the Add New Case panel.

Navigation: Home Page > Employee Search

Navigation: Main Menu > Time > Leave of Absence

Navigation: Home Page > Manage Leave of Absence Tile > Go To Leave of Absence

1. From the **Add New Case** panel drop-down list, select a leave **Category**.
2. From the drop-down list, select the leave **Reason**.
3. From the drop-down list, select the leave **Frequency**.
4. (Optional) Select the **Edit** icon to edit the **Case Code** name.
5. Enter or use the calendar to select a **Start Date**, **End Date**, and **Initial Request Date**.
6. From the drop-down list, select the **Case Approval Status**.
7. (Optional) Make changes to the **Case Defaults**.

a. Change the default **Paid** time amount.

b. Change the default **Tracking** time amount.

c. Select the **Day Defaults**. Deselect or select days of the week that leave time should be applied. Only the days highlighted in blue will be included.

d. Enter the **Start Time** of the leave amount.

e. From the Commit to drop-down list, select one of the following:

    - **Timecard** – to commit leave time directly to the timecard and not the schedule.

    - **Schedule** – to commit leave time to the schedule so the schedule populates the timecard.

8. If you select **Schedule** from the **Commit** to drop-down list, select one of the following for **Override Scheduled Shifts**:

    - Accept the default value of **No**.
    - Select **Yes**, and then select either **Full** or **Partial** from the **Override Scheduled Shifts Type** drop-down list. Deselect **Create Open Shift** if you do not want the schedule to show an open shift in the schedule.

9. (Optional) Select a **Transfer** from the drop-down list to transfer the leave time to another Labor Category, Cost Center, Job, or Work Rule.

10. Select **Apply**.

The **Leave Case Editor** page appears. Depending on the leave case you may need to complete the following sections:

- **Case Details** – Modify the details of the case such as dates and approval status.
- **Eligibility & Rules** – Qualify, bypass, or edit the employee's eligibility for leave, assign, or modify the leave rules for the employee.
- **Documents -** View, manage, and send leave documents.
- **Additional Information** – Add general information about the leave case.
- **Case Notes** – Add notes about the leave case.
- **Frequency & Duration** – Modify the frequency of the leave or duration of leave time.
- **Manage Case Notifications** – Create notifications based on dates or accrual limits.