Paid Time Off
-- PTO Application--

For Administrators

v. DHR1.0, July 2008
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Viewing Administrator Functions

1. The PTO system tracks full time monthly paid staff. However, weekly paid or part time staff can be designated as an administrator.

2. When logged into the system, administrators who are themselves full time monthly paid staff in an organization that tracks PTO through the online system will see their own employee options at the top of the menu bar at the lefthand side of the screen. Administrator functions will be located below this.

3. Administrators who are part time or weekly paid staff, or who are full time monthly paid staff in an organization that does not track PTO using the online system, will only see the administrator functions in this menu.
1. Enter information into one or all of the fields "Last Name", "First Name", and "PennKey", then click the "Find Users" button.

2. Select one or more employees by clicking the "Select" button next to their PennKey(s). Use search options to narrow down the search.
3. Click the "Edit" button next to a request to edit its details.

4. Double-clicking on a date range will let you view the details of a request.
Assigning Supervisors

It is critical that Administrators always take the time to read the information and instructions on the screen. This function in particular can be confusing if the screen is not being read.

1. Enter information into one or all of the fields “Last Name”, “First Name”, and “PennKey”, then click the “Find Users” button.

2. Click the “Select” button next to the employee to whom you want to assign a supervisor.
Assigning Supervisors cont’d

Once you have selected the employee, perform a search for the new supervisor using the same search fields and click the “Select” button next to the supervisor you wish to assign. You may select a faculty member.

You will be asked to confirm your selection. Verify that the information is correct, and click the “Confirm” button.
You will perform User Imports when an employee is joining your organization from another part of the University which does not use the PTO Application. These employees will have a paid time off balance that needs to be updated.

1. To upload an import file, click the "Browse" button.

2. Navigate to the file location using the window that will open. To select the file, double-click it or click it once and then click the "Open" button.

3. Finally, click the "Upload" button.

File specifications
Batch upload files should be asci text comma-separated files with one entry per line. The first line contains heading information, and each subsequent line contains a row of data for:

- pennid, supervisor, effective date, policyCode1, policyCode2, policyCode3, ...

v. DHR1.0, July 2008
Manage Administrators
(Manual Method)

This function is available to System Administrators and Org. Administrator Designators only. Org. administrators will not see this function, as they cannot assign administrative responsibilities.

The levels of administrators are as follows:
System Administrator  
Assigns Orgs. to:

Org. Admin. Designator  
Can only assign orgs. that they have been assigned.

Org. Administrator  
Usually assigned Org. responsibility for a specific department/org. Receives permissions from the Org. Admin. Designator for their overall center/unit.

---

1. Enter information into one or all of the fields “Last Name”, “First Name”, “PennKey” and “Penn ID”, then click the “Find Users” button.

Choose the Administrator to Manage

Search Criteria

First Name
Last Name
Pennkey
Penn Id

Note: If the administrator you wish to manage is not a user of the PTO system, you must enter their Penn Id.

Find Users  Clear

---

2. To select an administrator, click the “Select” button next to his/her name and PennKey.

---

v. DHR1.0, July 2008
Assigning Organizations (Manual Method)

Newly designated administrators will need to log out and log back in before they can see administrator options in the menu bar on the lefthand side of the page.

1. Once you have selected an administrator to assign an organization to (see page 9), enter the 4-digit Org. Code for the organization you wish to assign in the “New Org.” field. Then click the “Submit” button.

2. Enter as many Org. Codes as needed, or uncheck a previously assigned code to remove responsibility for that organization from the active administrator.

Choose the orgs this user can administer

Editing user Change

New Org: [Field]
Submit

Choose the orgs this user can administer

Editing user Change

- 1111
- 2222
- 3333
- 4444

New Org: [Field]
Submit

Import administrators from flat file

v. DHR1.0, July 2008
Manage Administrators  
(File Import Method)

This function is only available to System Administrators and Org. Administrator Designators.

1. To prepare a .csv file for import, enter the Penn ID of the employee being assigned Org. Admin responsibilities in column “A”. Enter the Org. Codes for the organizations being assigned to the employee in columns “B”, “C”, “D”, etc. (working across).

To upload the file, click the “Browse” button and locate the saved .csv file in the window that will appear. Double-click the file, or click it once and then click the “Open” button, to select it. Finally, click the “Upload” button.
Administrators can look up and print out employee time balances. Double-click on a type of balance for details.

**Employee balance information**

**Viewing user**

Benefit Start Date: 04/01/1999
System Managed Date: 07/01/2006

Clear this user's balances

**Current Balances:**

<table>
<thead>
<tr>
<th>Type</th>
<th>Current Balance</th>
<th>Active</th>
<th>Initial Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation (607)</td>
<td>24</td>
<td>Yes</td>
<td>18</td>
</tr>
<tr>
<td>Sick Leave (612)</td>
<td>42</td>
<td>Yes</td>
<td>39</td>
</tr>
<tr>
<td>Short term disability (404)</td>
<td>42</td>
<td>Yes</td>
<td>42</td>
</tr>
<tr>
<td>Sick Leave (613.1)</td>
<td>0</td>
<td>No</td>
<td>0</td>
</tr>
</tbody>
</table>

**Vacation History for**

Available balance: 24

To print, select the PRINT option from your browser. You may need to change your page size to landscape.

<table>
<thead>
<tr>
<th>Period Start</th>
<th>Period End</th>
<th>Annual</th>
<th>Usage</th>
<th>Net</th>
<th>New Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/01/2008</td>
<td>06/30/2008</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>24</td>
</tr>
<tr>
<td>09/01/2008</td>
<td>12/31/2008</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>24</td>
</tr>
<tr>
<td>03/01/2009</td>
<td>04/22/2009</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>24</td>
</tr>
<tr>
<td>03/01/2008</td>
<td>04/30/2008</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>26</td>
</tr>
<tr>
<td>01/01/2008</td>
<td>01/31/2008</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>20</td>
</tr>
<tr>
<td>12/01/2007</td>
<td>12/31/2007</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

**Sick Leave History for**

Available balance: 42

To print, select the PRINT option from your browser. You may need to change your page size to landscape.

<table>
<thead>
<tr>
<th>Period Start</th>
<th>Period End</th>
<th>Annual</th>
<th>Usage</th>
<th>Net</th>
<th>New Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/01/2008</td>
<td>05/31/2008</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>42</td>
</tr>
<tr>
<td>04/01/2008</td>
<td>04/30/2008</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>41</td>
</tr>
<tr>
<td>02/01/2008</td>
<td>02/22/2008</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>40</td>
</tr>
<tr>
<td>01/01/2008</td>
<td>01/31/2008</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>39</td>
</tr>
<tr>
<td>12/01/2007</td>
<td>12/31/2007</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>37</td>
</tr>
<tr>
<td>11/01/2007</td>
<td>11/30/2007</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>36</td>
</tr>
<tr>
<td>10/01/2007</td>
<td>10/31/2007</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>35</td>
</tr>
<tr>
<td>09/01/2007</td>
<td>09/30/2007</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>34</td>
</tr>
<tr>
<td>08/01/2007</td>
<td>08/31/2007</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>33</td>
</tr>
<tr>
<td>07/01/2007</td>
<td>07/31/2007</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>32</td>
</tr>
<tr>
<td>06/01/2007</td>
<td>06/30/2007</td>
<td>1</td>
<td>-1</td>
<td>0</td>
<td>33</td>
</tr>
<tr>
<td>05/01/2007</td>
<td>05/31/2007</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>32</td>
</tr>
<tr>
<td>04/01/2007</td>
<td>04/30/2007</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>31</td>
</tr>
</tbody>
</table>

**Short term disability History for**

Available balance: 42

To print, select the PRINT option from your browser. You may need to change your page size to landscape.

Assumptions of short term disability allows continuation of full base pay when an eligible employee is unable to be absent for work because of extended illness or medical condition.

Accumulated short term disability may be utilized provided the duration of the illness has been ten (10) or more consecutive days and all available sick leave and paid time off have been exhausted.

<table>
<thead>
<tr>
<th>Period Start</th>
<th>Period End</th>
<th>Annual</th>
<th>Usage</th>
<th>Net</th>
<th>New Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/01/2006</td>
<td>07/30/2006</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>42</td>
</tr>
</tbody>
</table>

v. DHR1.0, July 2008
Caution: This functionality was added to enable online correction of newly imported PTO users. A change to an initial balance will dynamically recalculate all historical balances for the affected Policy. Please only use this for newly created PTO users.

1. To update the initial PTO balance for an employee, enter the number of initial days in the appropriate field and click the "OK" button.

```
<table>
<thead>
<tr>
<th>Type</th>
<th>Current Balance</th>
<th>Active</th>
<th>Initial Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation (607)</td>
<td>0</td>
<td>Yes</td>
<td>0</td>
</tr>
<tr>
<td>Sick Leave (612)</td>
<td>0</td>
<td>Yes</td>
<td>0</td>
</tr>
<tr>
<td>Short term disability (404)</td>
<td>22</td>
<td>Yes</td>
<td>22</td>
</tr>
</tbody>
</table>
```

A window will pop up confirming your change. Click the "OK" button to return to the "Employee balance information" screen. This screen will not immediately display the recalculated balances—you must navigate to the balance history pages by clicking a PTO type to view the recalculated totals.
The Sick Balance Worksheet is now available from the PTO Application. The worksheet will be populated and can be printed and signed.

**WORKSHEET FOR CALCULATING MONTHLY SICK BALANCES**

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Earned</th>
<th>Used</th>
<th>Fiscal Year Balance</th>
<th>Accumulated Sick Time</th>
<th>Short Term Disability Earned</th>
<th>Short Term Disability Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial balance for 01/01/2007</td>
<td>22</td>
<td>0</td>
<td>Balance: 22</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please indicate the number of sick days used in each fiscal year. Please indicate the Paid Time Off balance as of the last day worked.

Paid Time Off (PTO) Balance: 125

Date: 06/10/2007

Business Administrator Signature: ____________________________
Enter Time: Short Term Disability, Unpaid Leave and Military Duty

1. Enter information into one or all of the fields “Last Name”, “First Name”, and “PennKey”, then click the “Find Users” button. To select an employee, click the “Select” button next to his/her name and PennKey.

2. Regardless of the employee's Job Grade, the date ranges that he or she is out on Short Term Disability must be entered. This stops PTO accrual during that timeframe.

Enter short term disability time

Editing user

<table>
<thead>
<tr>
<th>Range Start</th>
<th>Range End</th>
<th>Amount of Day</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Full Day</td>
</tr>
</tbody>
</table>

Total work days: 0

Administrator comments:

Submit | Cancel
Entering a date range for unpaid leave stops PTO accrual during that timeframe.

During the paid military leave period, the employee will continue to accrue PTO. However, there is a maximum amount of time that will accrue per year.
Create a Request

As an administrator, you can create time off requests for an employee.

Create time off request for

Editing user

Please select the request type: Vacation

Begin Request

When an administrator submits a request for an employee, an email is sent to the employee and his or her designated supervisor notifying them that the named administrator submitted the request.

Enter Vacation request details for

<table>
<thead>
<tr>
<th>Range Start</th>
<th>Range End</th>
<th>Amount of Day</th>
<th>Total work days:</th>
<th>Available balance:</th>
<th>Projected balance as of 06/28/2007:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Full Day</td>
<td>0.0</td>
<td>21.0</td>
<td>21.0</td>
</tr>
</tbody>
</table>

Administrator comments (optional):
Please do not include any sensitive personal information such as health or financial information.

Back Submit
When an employee no longer works for the University, his/her balances should be deleted from the system. To do this, select “Balances” from the blue menu bar on the lefthand side of the screen, enter the appropriate search criteria and select the employee. Then click the link titled “Clear this user’s balances”.

Enter any relevant comments, and click the “Submit” button.

This will clear out the balances for an employee who no longer works for the university. Please enter a comment to indicate the reason for these balances being cleared. For example if the employee resigned and was paid for their remaining vacation time, or if the employee was terminated and no payment was made.
Employee Departures cont’d

3

A confirmation box will appear. Click “OK” to confirm your action.

4

The employee’s balances will now be cleared and set to zero.

Employee balance information

Viewing user

Benefit Start Date: 06/01/2000
System Managed Date: 07/01/2006
Termination: Clear this user's balances

Current Balances:

<table>
<thead>
<tr>
<th>Type</th>
<th>Current Balance</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation</td>
<td>0</td>
<td>Yes</td>
</tr>
<tr>
<td>Sick Leave (612)</td>
<td>0</td>
<td>Yes</td>
</tr>
<tr>
<td>Short term disability (404)</td>
<td>0</td>
<td>Yes</td>
</tr>
<tr>
<td>Sick Leave (613.1)</td>
<td>0</td>
<td>No</td>
</tr>
</tbody>
</table>
Unassigning Supervisors

Caution: Clicking "Choose No Supervisor" will remove the selected employee from the supervisor's lists of employees.

1. Enter information into one or all of the fields "Last Name", "First Name", and "PennKey", then click the "Find Users" button.

Choose the User to Edit
Search Criteria
First Name
Last Name
Pennkey
Find Users  Clear

2. Click the "Select" button next to the name of the employee from whom you would like to unassign a supervisor.

Choose the User to Edit
Search Criteria
First Name
Last Name
Pennkey
Find Users  Clear

Full Name
Employee 1
Pennkey
emp1

Select
3. After selecting the employee, click the red “Choose No Supervisor” button.

4. The confirmation page will appear. Click the “Confirm” button to complete your action.
PTO MANAGEMENT SYSTEM
NEW FEATURES

- PTO USAGE REPORT
- PTO BALANCE REPORT
- AUTHORIZE WEEKEND WORK

PTO USAGE REPORT

- PTO Usage Report – This feature gives PTO Org Administrators and PTO Org Administrator Designators the capability of running reports to ascertain what staff members have not used the PTO System for a specified period of time. To access this report follow the instructions below:
  a. Under the Administrator’s menu, go to the Reports section
  b. Click on the link, “PTO Usage Report”
  c. Enter the time frame and org you want to view
  d. Click the submit button
  e. PTO Org Administrators can access a usage report for their assigned orgs only.
     PTO Org Administrator Designators can access a usage report for any org in their assigned school or center.
### PTO Usage Report

**System Administrator**
You have the ability to perform administrative tasks for all orgs.

**Submit**

<table>
<thead>
<tr>
<th>View employees not reporting PTO since:</th>
<th>01/01/2011</th>
<th>Org: 9200</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Employee</th>
<th>Org</th>
<th>Vacation Balance</th>
<th>Sick leave Balance</th>
<th>Short term disability Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Len Brown</td>
<td>9200</td>
<td>23</td>
<td>22</td>
<td>0</td>
</tr>
</tbody>
</table>

Report will show staff (and their balances) not using PTO System during timeframe.

**Submit** **Home**
PTO BALANCE REPORT

You can run balance reports for exempt staff members in your assigned orgs by following the steps below:

• After logging into the PTO System, click on the PTO Balance Report link under your reports menu.

To build the report:

• Specify a date range for the report by using the calendar feature or entering the begin and end dates in the range
• Select which org(s) you want to include in the report by highlighting the org in the “Available” field and clicking the ➡️ arrow key to move the org to the “Selected” field. Once an org is selected it will appear in the “Selected” field and disappear from the “Available” field.

• If you want to remove an org from the report, you should highlight the respective org in the “Selected” field and click on the ➡️ arrow key to move the org from the “Selected” field to the Available field.
• Click Submit
• You can export the report to Excel by clicking on the Export to Excel link
• If you want to see expanded information on each staff member in the report, e.g., time off requests and requests statuses, click the “export expanded” box before clicking the Export to Excel link.

Export expanded ☑️ Export to Excel
AUTHORIZE WEEKEND WORK

- The PTO System is now programmed to track time off for staff whose normal work schedule includes weekends. Therefore, these staff members can now use the PTO System to request time off for Saturday and/or Sunday.

- If you have staff whose normal work schedule includes weekends, you can activate the PTO System Weekend Work Feature for these staff members by following in the instructions below:
  a. Under the Administrator’s menu, go to the Entire Time Section
  b. Click on the link, “Authorize Weekend Work”
  c. Enter the name of the staff member you want to authorize for weekend work and click the Find Users button
  d. Select the correct staff member
  e. Click on the green “Authorize Weekend Work” button
  f. To change a staff member who is authorized in the PTO System to work weekends back to a normal Monday through Friday schedule, repeat steps a – d and then Click on the red “Revoke Weekend Work” button.
Choose the User to View

Search Criteria
First Name: Jeff
Last Name: Row
Pennkey: 

Find Users Clear

Find and select staff member who is authorized to work weekends

Full Name: JEFFREY S ROW
Pennkey: OW
Select

Weekend Work Authorization
User: JEFFREY S ROWLAND Change

This employee's current established work schedule in PTO System is weekdays only (M-F). Press button to change established work schedule to include weekends.
Authorize weekend work

Click on the green "Authorize weekend work" button

REVOKE WEEKEND WORK SCHEDULE

Weekend Work Authorization
User: JEFFREY S ROWLAND Change

This employee's current established work schedule in PTO System includes weekend days. Press button to change established work schedule to weekdays only (M-F).
Revoke weekend work

To revoke a weekend work schedule, find and select staff member then,

Click red "Revoke Weekend Work" button

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