

# Kronos Employee Self Service

## **Availability**

Availability data allows The Staffing Resource Centre to have up-to-date information regarding employees' availability to work or not work at the time of making scheduling decisions. Marking availability is the sole responsibility of the employee.

Employees can record their Availability by:

- Single date
- Multiple selected dates
- Repeating pattern

Employees can indicate availability by:

- Whole day
- Portion of a day
- Shift Class
- Specific Time

To Display Availability: From the My Information menu tab, select Availability.



Selected days have a gray background

To change availability type; *Regular* or *Overtime*, use the View Menu.

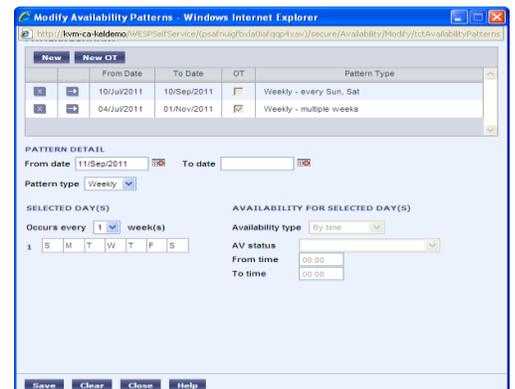
### Editing Availability

1. To edit availability, select the date(s) to be edited in the schedule.
2. Select Add/Edit Availability from *Availability Menu*
3. The selected date(s) are displayed with a gray background
4. From Availability Type *Drop-Down Menu*, select by: *Time or Shift Class*



### Editing Availability by Patterns: Weekly or Monthly

1. Select Add/Edit Patterns from the Availability Menu
2. Click New
3. The Modify Availability Patterns dialog to add, edit or delete patterns of availability information



## Kronos Employee Self Service

### **Book Off Request**

For various reasons, employees may need to submit a request to not work a shift or shifts on their current schedule. These are *Off Requests*. Through Employee Self Service, employees submit *Off Request* electronically to their manager for processing. Once an *Off Request* is submitted, the manager can view the details of the request and either *Approve* or *Deny* the request. The employee can see the status of their request in Employee Self Service.

#### Off Request Reasons:

- Vacation time
- Holiday time
- Appointment time
- Overtime lieu
- Callback lieu
- Advanced Sick time

#### To Submit an Off Request

1. Display the Home Page of your Employee Self Service.
2. Scroll to the relevant month to display the *Employee Schedule* that contains the shift(s) to be requested off.
3. Click on the date(s) on the *Employee Schedule* to be requested off.
4. Select *Off* from the *Requests Menu* above the *Employee Schedule*.
5. In the Submit Request To section, select to whom the *Off Request* will be submitted to.
6. Select a priority for the *Off Request* from the *Priority Drop-Down Menu*.
7. Review the contents of the table containing the details of the selected shift(s) to request off.
8. If the entire shift is being requested off, there is no need to alter the start and end times. When requesting part of the shift off, alter the start and end dates accordingly.
9. Select the appropriate *Off Reason* from the *Request Reason Drop-Down Menu*.
10. Employees may add a *Comment* for the Approver to read. Click *Submit* to save the *Comment* and attach it to the *Off Request*.
11. When the details of the Off Request have been entered and reviewed. Click Submit.

Request Off - Burns, Mary C - Windows Internet Explorer

http://kvm-ca-keldemo/WESPSelfService/(eh3or045eamelm55wjqb05uy)/secure/Schedules/Request/tctRequestOffShifts.aspx?DialogWindow=1&SelDates=2011-07-24~00:00|2011-07-26~00:00

Submit Request To: Select Approver... SLT - Emergency Department Priority: Normal

	Shift Date	Symbol	Shift Start	Shift End		Request Start	Request End	Request Reason	Request Status
<input checked="" type="checkbox"/>	Sun 24/Jul/2011	16H	16:00	00:30		16:00	00:30	Vacation 1	New
<input checked="" type="checkbox"/>	Tue 26/Jul/2011	9H	09:00	17:30		09:00	17:30	Vacation 2	New
<input checked="" type="checkbox"/>	Thu 28/Jul/2011	9H	09:00	17:30		09:00	17:30	Vacation 3	New

Comment Summary: I would like to take this week as vacation please. Add Comment

Submit Cancel Help

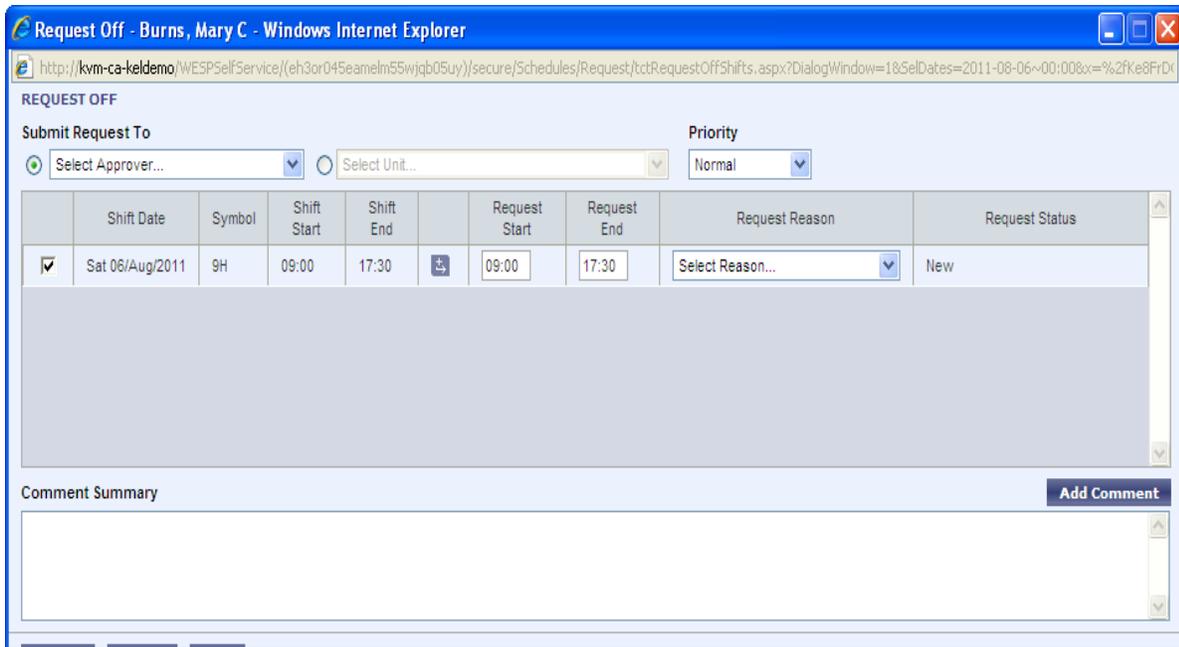
## Kronos Employee Self Service

### ***Book Off Request for a Portion of a Shift***

1. Display the Employee Self Service Home Page.
2. Click the shift on the employee schedule to be requested off.  
*The selected shift(s) are shaded in light gray.*
3. Select *Off* from the *Requests Menu* above the schedule.
4. Select the appropriate approver for the request. Select either a specific manager from the *Select Approver Drop-Down Menu*, or the unit from the *Select Unit Drop-Down Menu*.
5. Select a *Priority* for the request, if required.
6. Clear the check box at the head of each row for any shift that is no longer to be included in the off request. Once the check box is cleared, the shift will no longer be included in the off request.
7. Insert a new row, if required, by clicking the Insert Row symbol. 
8. Adjust the request *Start* and *End* times, as appropriate.
9. Select the appropriate *Off Reason* from the *Request Reason Drop-Down Menu*.
10. Click *Add Comment* to enter a comment, if required.
11. When the request is ready to be sent, click *Submit*.

Employee Self Service displays a message confirming that the request has been submitted.

12. Click *OK*.



Request Off - Burns, Mary C - Windows Internet Explorer

http://kvm-ca-keldemo/WESPSelfService/(eh3or045eamelm55wjqb05uy)/secure/Schedules/Request/tctRequestOffShifts.aspx?DialogWindow=1&SelDates=2011-08-06~00:00&x=%2fKe8FrDc

**REQUEST OFF**

Submit Request To

Select Approver... Select Unit... Priority: Normal

	Shift Date	Symbol	Shift Start	Shift End		Request Start	Request End	Request Reason	Request Status
<input checked="" type="checkbox"/>	Sat 06/Aug/2011	9H	09:00	17:30		09:00	17:30	Select Reason...	New

Comment Summary Add Comment

## Kronos Employee Self Service

### ***Book off Request for an Entire Shift using Different off Reasons***

1. Display the Employee Self Service Home Page.
2. Select the shift on the employee schedule to be requested off.
3. Select *Off* from the *Requests Menu* above the schedule. The *Request Off* dialog box is displayed.
4. Select the appropriate approver for the request. Select either a specific manager from the *Select Approver Drop-Down Menu*, or the unit from the *Select Unit Drop-Down Menu*.
5. Select a *Priority* for the request, if required.
6. Clear the check box at the head of each row for any shift that is no longer to be included in the off request.
7. Insert a new row by clicking the Insert Row symbol.
8. Adjust the request *End* time in the first row.
9. Adjust the request *Start* time in the second row.
10. Select the appropriate *Off Reason* for each row from the *Request Reason Select Unit Drop-Down Menu*.
11. Click *Add Comment* to enter a comment, if required.
12. When the request is ready to be sent, click submit.

Employee Self Service displays a message confirming that the request has been submitted.

13. Click

Request ID	Requester	Request Date	Priority	Last Viewed By
125	PPT 60 Test, RN2	14/Nov/2012	Normal	

Shift Date	Symbol	Shift Start	Shift End	Request Start	Request End	Request Reason	Request Status	Cancel
Sun 25/Nov/2012	D 7	07:00	19:00	07:00	15:00	Vacation	Pending	<input type="checkbox"/>
				15:00	19:00	Holiday Taken		<input type="checkbox"/>

Comment Summary Add Comment

## Kronos Employee Self Service

### ***Reviewing Status of a Submitted Off Request***

At any time after submitting the *Off Request*, employees can review the status of the *Off Request* on the *Requests Page*. An Off Request will have one of three completion statuses:

New: The *Off Request* has not yet been viewed by the manager.

Incomplete: The manager has viewed the *Off Request*, but has not yet processed it.

Complete: The *Off Request* has been processed by the manager. It was wither *Approved* or *Denied*. To see the decision, the user can view the details of the request. ( + )

OFF REQUESTS							
Relief Request		Work Request					
Request ID	Request Date/Time	Description	Priority	Sent To	Status		
200	04/Jul/2011 20:11	Jul 09-Jul 09 ED	Normal	ED	New		
203	04/Jul/2011 20:29	Aug 06-Aug 06 ED	Normal	ED	New		
199	04/Jul/2011 20:11	Jul 07-Jul 07 ED	Normal	ED	Incomplete		
202	04/Jul/2011 20:27	Jul 24-Jul 28 ED	Normal	ED	Complete		
Shift Date	Description	Request Start	Request End	Off Reason	Status	Last Viewed By	
24/Jul/2011	ED, RN, 16H, 16:00-00:30	16:00	00:30	Vacation 1	Approved to schedule	Doris Maynard	
26/Jul/2011	ED, RN, 9H, 09:00-17:30	09:00	17:30	Vacation 2	Approved to schedule	Doris Maynard	
28/Jul/2011	ED, RN, 9H, 09:00-17:30	09:00	17:30	Vacation 3	Approved to schedule	Doris Maynard	

### Off Request Status Summary

When the manager has...	On Requests Page	On Home Page
<ul style="list-style-type: none"> <li>not yet viewed the request</li> </ul>	<ul style="list-style-type: none"> <li>Request status is <b>New</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Off request color-coded <b>bright blue</b> on schedule when requests are displayed.</li> </ul>
<ul style="list-style-type: none"> <li>viewed but not yet actioned the request</li> </ul>	<ul style="list-style-type: none"> <li>Request status is <b>Incomplete</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Off request color-coded <b>bright blue</b> on schedule when requests are displayed.</li> </ul>
<ul style="list-style-type: none"> <li>approved the request but not yet actioned it in Workforce ESP</li> </ul>	<ul style="list-style-type: none"> <li>Request status is <b>Complete</b>.</li> <li>Approval status is <b>Approved</b>, which is visible when details of request are displayed.</li> </ul>	<ul style="list-style-type: none"> <li>Off request no longer appears when requests are displayed on the schedule.</li> </ul>
<ul style="list-style-type: none"> <li>approved the request and also actioned it in Workforce ESP</li> </ul>	<ul style="list-style-type: none"> <li>Request status is <b>Complete</b>.</li> <li>Approval status is <b>Approved</b>, which is visible when details of request are displayed.</li> </ul>	<ul style="list-style-type: none"> <li>Off request no longer appears when requests are displayed on the schedule.</li> <li>Instead, an off exception color-coded <b>light blue</b> is displayed on the schedule. The employee has been booked off the shift.</li> </ul>
<ul style="list-style-type: none"> <li>denied the request</li> </ul>	<ul style="list-style-type: none"> <li>Request status is <b>Complete</b>.</li> <li>Approval status is <b>Denied</b>, which is visible when details of request are displayed.</li> </ul>	<ul style="list-style-type: none"> <li>Off request no longer appears when requests are displayed on the schedule.</li> </ul>

# Kronos Employee Self Service

## *Swap Request*

The Swap Requests feature allows employees to swap shifts on the same day or different days. Shifts must be swapped on a shift-by-shift basis. That is, the employee requesting the swap must work one of the other employee's shifts. When entering a swap request, employees select the day they want to have off. They then select the shift from a second employee's schedule that they want to work in exchange.

### Swap Request Process

	Step One	Step Two	Step Three	Step Four	Step Five
Manager			Reviews the request. Approves or denies the off request.	Request processed immediately in Workforce ESP. If not, request to be manually entered in Workforce ESP.	
Employee 1	Submits a swap request to an employee.				Reviews the status of submitted request.
Employee 2		Reviews the request. Approves or denies the swap request.			Reviews the status of submitted request.

#### Submitting a Swap Shift Request:

1. Click the date(s) on the employee schedule to be requested as a swap.
2. Select *Swap* from the *Requests Menu*.
3. This displays the *Request Swap* dialog box.
4. Select the employee name from the *Employee Drop-Down Menu* and the schedule date, click *Go*
5. Select the shift in the schedule to be swapped
6. To add a comment, click *Add Comment*
7. When the details of the request have been entered, click *Request*, then *OK*

#### Receiving a Request to Swap Shifts:

1. Display the Requests page.
2. Select the Swap Requests tab.
3. Click the *plus sign (+)* in the far left column to review the details of the swap.
4. To action the request, click the *Request ID number hyperlink* to the right of the plus sign (+).
5. From the Swap State drop-down list, select *Accept* or *Decline*.
6. If *Accept* is selected, in the *Sent To* section, there are two options for selecting to whom the request is submitted for approval: a specific approver or a unit.



## Kronos Employee Self Service

### ***Review the Status of a Swap Request***

When a request is *Approved* or *Denied* by the manager or the SRC, its completion status changes from *New* or *Incomplete* to *Complete*. To determine whether the request was approved or denied, the user needs to review the details of the request.

Steps to Review Status of a Swap Request:

1. Display the *Requests Page* and filter the displayed information by *Status*, if required.
2. To determine if a request with the status of *Complete* was *Approved* or *Denied*, click the plus sign (+) to the left of that request.

OFF REQUESTS		RELIEF REQUESTS		SWAP REQUESTS		WORK REQUESTS	
Relief Request		Work Request					
	Request ID	Request Date/Time	Employee	Swap With	Swap State	Sent To	Status
-	204	04/Jul/2011 21:08	Burns, Mary C [PT - P]	Baril, Mary F [PT - P]	Accepted	ED	Complete
Employee		Shift Date	Description	Status	Last Viewed By		
Burns, Mary C [PT - P]		11/Jul/2011	ED, RN, 16H, 16:00-00:30	Approved to schedule	Doris Maynard		
Baril, Mary F [PT - P]		14/Jul/2011	ED, RN, 6L, 06:00-18:30	Approved to schedule	Doris Maynard		
Historical Comments							

3. The plus sign (+) changes to a minus sign (-) and Employee – Self Service expands the selected request to display the details of the request, including whether the request was approved or denied.

Swap With	Swap State	Sent To	Employee	Shift Date	Symbol	Unit	Occ Type	Start Time	End Time	Paid Hours
Baril, M	Accepted	ED	Burns, M	11/Jul/2011	16H	SLT - ED	RN	16:00	00:30	8.00000
			Baril, M	14/Jul/2011	6L	SLT - ED	RN	06:00	18:30	12.00000

Request ID	Request Date	Status
204	04/Jul/2011	Approved to schedule

Unit Occ	Jul 8	Jul 9	Sun 10	Mon 11	Tue 12	Wed 13	Thu 14	Jul 15	Sat 16	Sun 17	Mon 18	Tue 19	Wed 20	Thu 21	Jul 22	Sat 23
SLT - ED RN		12 <sup>A</sup>		16 <sup>H</sup>			6 <sup>L</sup>	6 <sup>L</sup>	7 <sup>L</sup>	7 <sup>L</sup>			7 <sup>L</sup>	6 <sup>L</sup>		

Comment Summary		Add Comment
Date:	04/Jul/2011	
From:	Burns, Mary C	
Hi -	as discussed, here is the swap request. M	

4. An alternative method of viewing the details of a completed request is to click its Request ID number hyperlink. Click the Request ID number hyperlink of a different completed request.
5. To close the dialog, click Close.