



# Employee Kiosk Supervisor Manual

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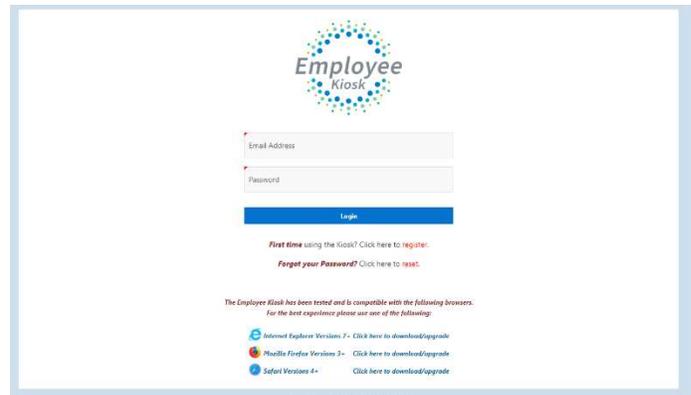
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## LOGGING IN

Logging into the Kiosk requires a full email address and user password.

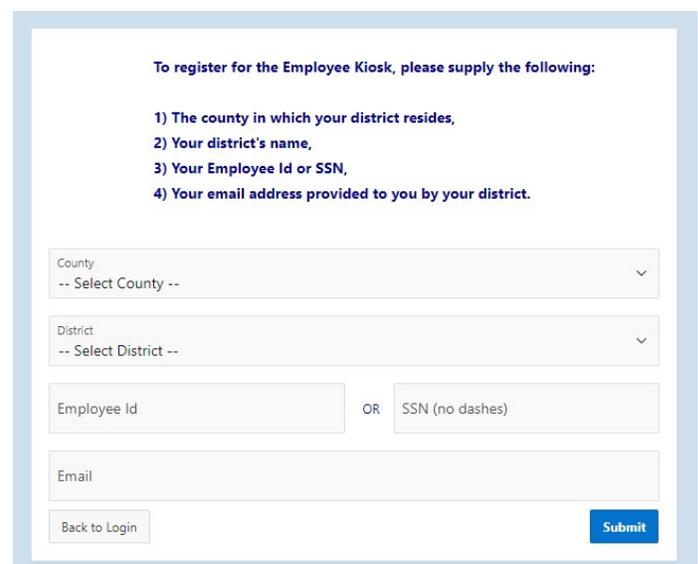


The image shows the Employee Kiosk login page. At the top is the 'Employee Kiosk' logo. Below it are two input fields: 'Email Address' and 'Password'. A blue 'Login' button is positioned below the password field. Underneath the login fields, there are two links: 'First time using the Kiosk? Click here to register.' and 'Forgot your Password? Click here to reset.'. At the bottom, there is a note about browser compatibility: 'The Employee Kiosk has been tested and is compatible with the following browsers. For the best experience please use one of the following:'. Below this note are three browser icons with links: Internet Explorer Versions 7+, Mozilla Firefox Versions 3+, and Safari Versions 4+.

To create a Kiosk Account, click on the First time user link at the login page and the screen on the right will display.

You will be required to enter the following:

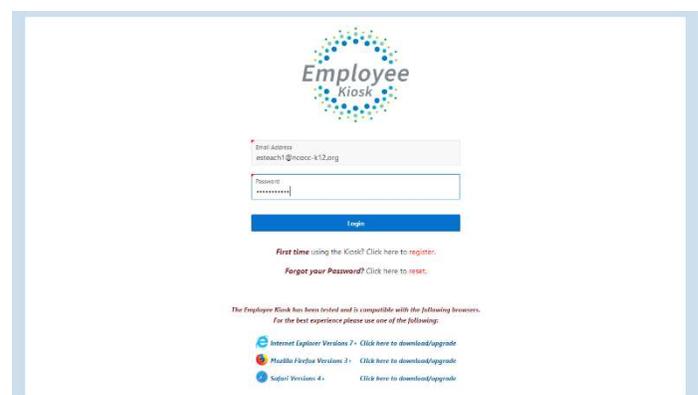
1. Either an employee id or social security number
2. Select the county where your district is located
3. Select your district
4. Enter your email address that is on your payroll record. You may need to check with your payroll department to verify the email address on file.



The image shows the registration form for the Employee Kiosk. At the top, it says 'To register for the Employee Kiosk, please supply the following:'. Below this are four numbered requirements: 1) The county in which your district resides, 2) Your district's name, 3) Your Employee Id or SSN, and 4) Your email address provided to you by your district. The form contains four input fields: 'County' (a dropdown menu with '-- Select County --'), 'District' (a dropdown menu with '-- Select District --'), 'Employee Id' and 'SSN (no dashes)' (two text input fields separated by 'OR'), and 'Email' (a text input field). At the bottom left is a 'Back to Login' button, and at the bottom right is a blue 'Submit' button.

A notification will be sent to the email address you supplied with the password to use for accessing the Kiosk.

Once the password is received you can access the Kiosk using the email address and password. When logging in for the first time you will be prompted to change your password. Currently the Kiosk password does not expire.



The image shows the Employee Kiosk login page with the email address field pre-filled with 'emil@hccs-k12.org'. The password field is empty. The rest of the page, including the 'Login' button, registration and reset links, and browser compatibility information, is identical to the previous image.



# PROFILE

The profile page gives the user the personal information drawn from USPS (Uniform School Payroll System).

The screenshot shows the 'Employee Profile' page with the following data:

Employee ID:	HED000100	State Certification ID:	ZT9601021						
<b>Name</b>									
First Name:	Grace	Middle Name:	C	Last Name:	Payroll	Suffix:	-		
Legal First Name:	-	Legal Middle Name:	-	Legal Last Name:	-	Legal Suffix:	-		
<b>Contact Information</b>									
Address 1:	6632 Rooster Road	Phone:	(444) 555-9998						
Street Address 2:	-	District Phone:	-	District Extension:	-				
City:	Sample	State:	OH	Zip Code:	44444				
Email Address(es):	payroll@reocc.k12.oh.us								
<b>Education / Qualifications</b>									
Degree Type:	Bachelors	ECE Qualification:	Not Applicable						
Semester Hours:	0	Other Credentials:	-						
<b>Employee Dates</b>									
Date of Birth:	05/22/1961	Last Evaluation:	07/01/2012	Last Paid:	02/27/2009	Contract Renewal:	-	Limited Contract Exp.:	-
Hire Date:	08/04/1999	Next Evaluation:	07/01/2013	ODHS New Hire:	08/04/1999				

If the information is in error you may Request Profile Data changes by clicking on the link in the top right hand corner. You can then enter your change in the white box next to that field that needs the correction and then click Submit Change Request. A request is sent to the payroll staff and they will manually update the payroll system.

This screenshot shows the 'Request Profile Data Change(s)' interface. A green arrow points to the 'Request Profile Data Change(s)' button in the top right corner. Below the button, the form fields are shown with input boxes for corrections:

Employee ID:	HED000100	State Certification ID:	ZT9601021				
<b>Name</b>							
First Name:	Grace	Middle Name:	C	Last Name:	Payroll	Suffix:	-
Legal First Name:	-	Legal Middle Name:	-	Legal Last Name:	-	Legal Suffix:	-
New First Name:	<input type="text"/>	New Middle Name:	<input type="text"/>	New Last Name:	<input type="text"/>	New Suffix:	<input type="text"/>
New Legal First Name:	<input type="text"/>	New Legal Middle Name:	<input type="text"/>	New Legal Last Name:	<input type="text"/>	New Legal Suffix:	<input type="text"/>
*** The LEGAL NAME fields represent the name printed on your Social Security Card and are used when creating your W-2.							
<b>Contact Information</b>							
Address 1:	6632 Rooster Road	Phone:	(444) 555-9998				
New Address 1:	<input type="text"/>	New Phone:	<input type="text"/>				

## POSITION DETAILS

This is a brief view of your contract information.

If you have multiple positions you can select the position from under the Current Positions section and the contract information for that position will display below.

The screenshot shows two sections: 'Current Positions' and 'Position Details'. The 'Current Positions' section contains a table with the following data:

Job Title	Calendar Start Date	Job Status	
Payroll Clerk	08/04/1999	Active	<a href="#">Display Details</a>

Below the table is a pagination indicator '1 - 1'. The 'Position Details' section displays the following information:

- Job Number: 1
- Job Title: Payroll Clerk
- Building Name: Cherokee Elementary School
- Contract Amount: \$50,000.00
- Hours In Work Day: 8
- Pay Per Period: \$1,923.08
- Work Days in Contract: 260
- Calendar Start Date: 08/04/1999
- Salary Schedule Step: 0
- Salary Schedule Column: 0
- Eligible for Sick Leave: Yes
- Eligible for Personal Leave: Yes
- Eligible for Vacation Leave: Yes
- Supervisor Name: Kevin Treasurer
- Supervisor Email: treasurer@ncocc.k12.oh.us

## PERFORMANCE REVIEWS

If your district is using the functionality of Performance Reviews you will have the ability to see when your last review was done, process employee performance reviews and view all processed performance reviews. This functionality will work correctly when a next evaluation date has been entered into USPS.

The screenshot shows a dropdown menu titled 'Performance Reviews' with the following options:

- [View My Performance Reviews](#)
- [Process Employee Performance Reviews](#)
- [View ALL Processed Performance Revi...](#)

## View My Performance Reviews

In this section you will be able to see any documentation that was attached by your supervisor for that review, and when your next review is due.

### My Performance Reviews

	Current Evaluation Date	Next Evaluation Date	Documents Attached
	09/02/1997	-	0

1 - 1

#### Performance Review Info

Employee Name	Evaluation Date	Next Evaluation Date
Kevin Treasurer	09/02/1997	-

#### Associated Performance Review Files

No files have been associated to this Performance Review.

## Process Employee Performance Reviews

You are presented with a list of employees and the status of their performance review.

	First Name	Last Name	Last Evaluation Date	Last Evaluation	Documents Attached	Next Evaluation Date
Process Review	CHRISTINA D	KING	08/12/2014	1845 days past due	0	-
Process Review	TIMOTHY J	BALLARD	01/03/2014	2007 days past due	0	-
Process Review	PAUL	BARBUTO	06/30/2015	1523 days past due	0	-
Process Review	SHANIA L	BENDER	08/12/2014	1845 days past due	0	-
Process Review	SHAWNIA R	BERARD	09/24/2014	1802 days past due	0	-
Process Review	JASON M	BRAND	09/04/2015	1609 days past due	0	-
Process Review	ROBERT B	BROWN	08/13/2013	2209 days past due	0	-
Process Review	DAVID P	CALDWAY	01/18/2011	3147 days past due	0	-
Process Review	DIANA KELLI	CKAMER	07/19/2017	773 days past due	0	-
Process Review	MICHAEL DAVID	DEER	02/29/2016	1279 days past due	0	-
Process Review	SHANE M	FILMART	08/13/2013	2209 days past due	0	-
Process Review	WENDY A	HANASKY	06/16/2011	2937 days past due	0	-
Process Review	TOM	HOLMAN	05/23/2016	1195 days past due	0	-
Process Review	KIM	IRADWAY	05/23/2016	1184 days past due	0	-
Process Review	ROBERT	JOHNSON	05/23/2016	1195 days past due	0	-

When you click on Process Review for an employee you then will have the ability to attach documents related to the review for that employee.

#### Performance Reviews

	Current Evaluation Date	Next Evaluation Date	Documents Attached
	08/04/1999	-	Not Processed
	07/01/2012	07/01/2013	Not Processed

1 - 2

[Return to Employee List](#)

#### Performance Review Info

Employee Name: Grace C Payroll | Evaluation Date: 07/01/2012 | Next Evaluation Date: 07/01/2013

#### Associated Performance Review Files

File Browser:

File Description:

[Upload and Attach the File](#)

No files have been associated to this Performance Review.

Once you have uploaded the file you will then see the file and have the ability to delete it if you need to.

Employee Name: Grace C Payroll      Evaluation Date: 07/01/2012      Next Evaluation Date: 07/01/2013

Associated Performance Review Files

File Browse: Choose File

File Description

Upload and Attach the File

Select	File Id	Filename	Description	Created By	Created Datetime T
<input type="checkbox"/>		IPDP_Teacher_Handout.pdf	Review	TREASURER@NCOCCCK12.OH.US	08/30/2019 03:20 PM

1 - 1

Delete Selected Rows

## View All Processed Performance Reviews

You can see all Processed Performance Reviews and the files that are attached to each review.

Processed Performance Reviews for District IRN: 926

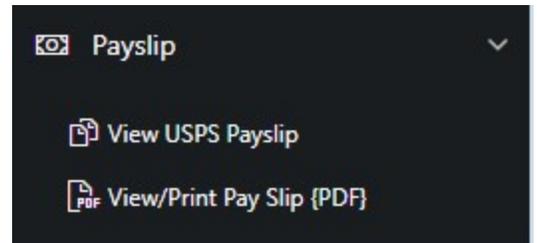
First Name	Last Name	Processed Evaluation Date	Documents Attached
Grace C	Payroll	07/01/2012	1

1 - 1

## PAYSLIP

There are now 2 options for viewing payslips.

- View USPS Payslip
- View/Print Pay Slip {PDF}



The main difference between the two options is that when you view the USPS Payslip you will not see the year-to-date totals on these payslips. The PDF payslips contain the actual year-to-date totals.

### View USPS Payslip

Viewing USPS Payslip permits the user to view past pay slips.

1. When you first select the USPS Payslip option you are prompted with a starting and ending date.
2. The default is the last 3 months of pay.
3. You can click on the calendar icon to change the date range.
4. Once you have your date range entered you can click Load Payslips.

Load Payslips for Date Range

Starting Date: [Calendar Icon]      Ending Date: [Calendar Icon]

Load Payslips

Payslip Summary

Go Rows: 50 Actions

5. You then are presented with a list of payslips. Click view icon to see the payslip detail.

6. You can click on the actions button to download the data. It may be exported to a .csv file (spreadsheet), not requiring you to contact payroll to get this information.

7. The number of payslips that are displayed can be changed by clicking on the Actions button and selecting rows per page.

Load Payslips for Date Range

Starting Date: 01/03/2003 Ending Date: 07/25/2019 [Load Payslips](#)

Payslip Summary

Gr Rows 50 Actions

Click to View Pay Slip	Pay Date	Check Num	Gross	Net	Direct Deposit	Sick Used	Vac Used	Pens Used	Sick Bal	Vac Bal	Pens Bal
<a href="#">View</a>	01/27/2009	500385	\$1,923.08	\$1,504.31	Y	0	0	0	44.75	6.838	2
<a href="#">View</a>	01/13/2009	500359	\$1,923.08	\$1,504.31	Y	0	0	0	44.75	6.838	2
<a href="#">View</a>	01/20/2004	500333	\$1,030.77	\$833.59	Y	0	0	0	44.75	6.838	2
<a href="#">View</a>	01/06/2004	500308	\$1,030.77	\$833.59	Y	0	0	0	44.75	6.838	2
<a href="#">View</a>	01/23/2004	500383	\$1,095.30	\$880.76	Y	0	0	0	44.75	6.838	2
<a href="#">View</a>	01/09/2004	500258	\$1,030.77	\$833.59	Y	0	0	0	38	1	2
<a href="#">View</a>	12/06/2003	500333	\$1,030.77	\$833.59	Y	0	0	0	38	1	2
<a href="#">View</a>	12/12/2003	500208	\$1,030.77	\$833.59	Y	0	0	0	38		

The information displayed is the same as that on the direct deposit email notification.

View / Print Payslip

\* \* \* NOTIFICATION OF DEPOSIT \* \* \*

To: Grace C Payroll  
 From: NCOCC TEST KIOSK  
 1234 DISTRICT LANE  
 MANSFIELD OH 44903

The accounts designated in your Authorization Agreement for Automatic Deposit are credited in the amount of \$1,504.31

Funds are available in your account(s) as of 02/27/2009

Your salary has been deposited as follows:

Type	Description	Amount
Checking	Direct Deposit - 700 (DDCHECK)	\$1,504.31

Below is a summary of your pay for the period ending 02/27/2009

PAY			DEDUCTIONS			
Name	Units	Amount	Name	Amount	Name	Amount
PAY CLER -REG 10.0000	1923.08	FED	77.48	HEALTH	34.00	
		OHIO	47.17	*HEALTH	306.00	
		SAMPLE	28.85	DENTAL	3.00	
		SAMPLE	8.08	*DENTAL	57.00	
		*SERS	269.23	MEDICARE	27.88	
		SERS-ANN	192.31	*MEDICARE	27.88	
Gross Amount	1,923.08					
Adjusted Gross	1,730.77					

## View/Print Pay Slip {PDF}

- When you first select the View/Print Pay Slip {PDF} option you can
  - View and/or Print Payslip
  - Download & Save Payslip

List of Available Payslips

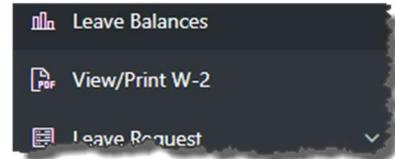
View and/or Print Payslip	Download & Save Payslip	Pay Date	Check Number
		07/25/2019	637319
		07/10/2019	637141

- View and/or Print will open your payslip as a PDF file.
- Download & Save will give you the option to save the pay slip to your PC.

**Note:** The PDF payslip will include year-to-date totals.

## VIEW/PRINT W-2

If your district is using the W2 functionality within Kiosk you will see your W2 information that can be viewed or printed.



List of Available W-2 Wage and Tax Statements

View and/or Print W2	Download & Save W2	Tax Year	Control Number
		2018	[REDACTED]
		2017	[REDACTED]
		2016	[REDACTED]
		2015	[REDACTED]



## LEAVE BALANCES

At this screen the user can see the types of leave they have and a quick balance of each. This balance reflects just the leave requests that have been exported into USPS.

Leave Balances					
	Monthly Accrual	Unit	Accum Max	Begin Bal	Balance
Personal Leave	N/A	Daily	3.00	3.00	2.00
Sick Leave	1.25	Daily	200.00	N/A	44.75
Vacation Leave	0.834	Daily	18.00	N/A	6.838

1 - 3

**NOTICE:** Displayed Leave Balances may not reflect current activity due to delayed posting.

You can also see detailed information of absences and accumulations for available leave types. You can filter the information to only display information based on Category (Leave Types which could include sick, personal, vacation, etc.), Job Number, Transaction Type (Either Absence or Accumulation), and Start/End Date. Filtering on any of the areas requires you to click the Action icon to initiate the filter.

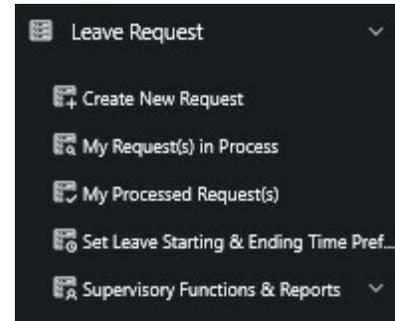
Each column that is underlined gives you the ability to sort the information based on that column. To sort on Activity Date so that the most recent dates are at the top click on the Activity Date.

Detail Leave Activity					
<input type="text"/> <input type="button" value="Go"/> Rows: 100 <input type="button" value="Actions"/>					
<input type="checkbox"/> <input type="button" value="Filter"/> Activity Date = 01/01/2000 <input type="button" value="X"/>					
<input type="checkbox"/> <input type="button" value="Filter"/> Activity Date between 01/01/2000 and 01/31/2000 <input type="button" value="X"/>					
<u>Category</u>	<u>Job No</u>	<u>Trans Type</u>	<u>Length Of Absence</u>	<u>Unit</u>	<u>Activity Date</u>
Sick	0	Accumulation	1.25	Daily	02/01/2004
Vacation	0	Accumulation	.834	Daily	02/01/2004
Sick	0	Accumulation	1.25	Daily	01/01/2004
Vacation	0	Accumulation	.834	Daily	01/01/2004
Sick	0	Accumulation	1.25	Daily	12/01/2003
Vacation	0	Accumulation	.834	Daily	12/01/2003
Vacation	1	Absence	1	Daily	11/10/2003
Sick	0	Accumulation	1.25	Daily	11/01/2003
Vacation	0	Accumulation	.834	Daily	11/01/2003

## LEAVE REQUEST

There are 5 areas under Leave Request:

- Create New Request
- My Request(s) in Process
- My Processed Request(s)
- Set Leave Starting & Ending Time Preferences
- Supervisory Functions

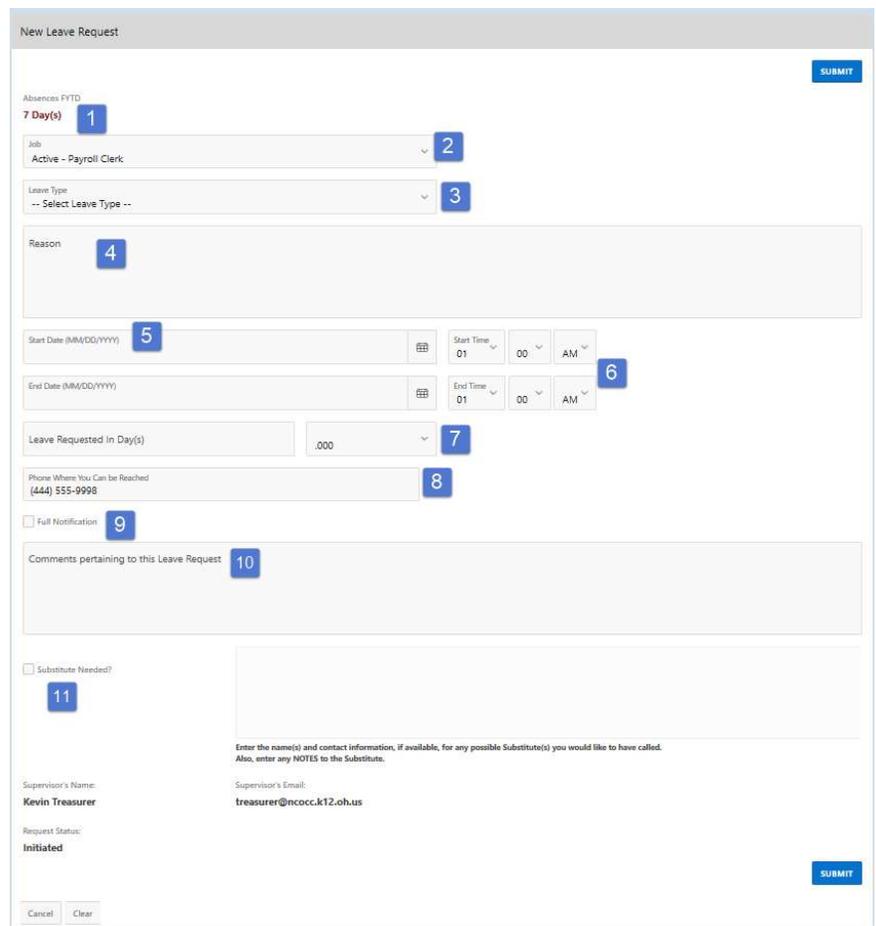


### Create New Leave Request.

1. Fiscal Year To Date Absences display at the top of the leave request.
2. Make sure your job that is eligible for leave is selected.

3. Select your leave type. If your district requires an additional reason for a specific leave type (sub-category) another box will display to select additional reasons for the leave request. Once you have selected your leave type a balance of that leave type will display and you will have an icon to click on to see additional leave requests that have been requested but not subtracted from the balance for that leave type.

4. You will need to enter a reason for the request. Some districts require a reason for specific leave types. If your district requires a reason you will receive an error if you leave the field blank.



The screenshot shows the 'New Leave Request' form with the following fields and callouts:

- 1: Absences FYTD (7 Day(s))
- 2: Job (Active - Payroll Clerk)
- 3: Leave Type (-- Select Leave Type --)
- 4: Reason
- 5: Start Date (MM/DD/YYYY)
- 6: Start Time (01:00 AM)
- 7: Leave Requested in Day(s) (.000)
- 8: Phone Where You Can be Reached ((444) 555-9998)
- 9: Full Notification checkbox
- 10: Comments pertaining to this Leave Request
- 11: Substitute Needed? checkbox

Supervisor's Name: Kevin Treasurer  
Supervisor's Email: treasurer@ncocc.k12.oh.us  
Request Status: Initiated

5. Start and End Date are both required – if you forget the date, you will be prompted to add it upon a submitting your request. You can click on the calendar icon to display a calendar to use to select your date.

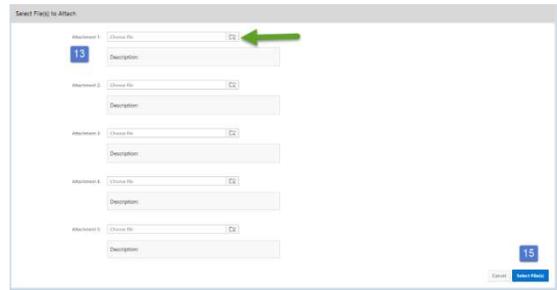
NOTE: If you enter a date in the past a message will be displayed on your leave request indicating you have entered a date that exists in the past. This is just an alert message and you may proceed with your request.

6. Start and End Times are both required – if you forget the time, you will be prompted to add it upon submitting your request. This can be set as a preference. See Set Leave Starting & Ending Time Preferences section.
  7. Enter amount of time you are requesting. If your district uses hours you will enter your time in hours. If your district uses days you will enter your request in increments of .25.
  8. Your phone number will be populated from your Profile information.
  9. Place a check mark in the box if you want to receive an email every time action is taken on your request. If you do not place a check mark in this box you will receive an email message when the request is initiated and when it has received final approval.
  10. Enter any comments you want your supervisor to be aware of.
  11. If you need a substitute you will need to check the box and then the comment box will be available for you to type a comment in. This information will then be displayed to anyone who has access to view your request.
- NOTE:** Some districts may have configured Substitute Needed box to already be checked for you when you create a request. If the box is checked to show you need a substitute then you will be able to click in the comment box to type your comment for this request.
12. You have the ability to attach a document to your leave request. You may need to attach a doctor's excuse, an agenda or registration form for a meeting. Click on Select File(s) to attach.

13. Click browse to find the attachment that is located on your PC.
14. Once you have located the file click open.

15. Type in a description for your file and click Select File(s).

16. When your request has been filled out completely press the submit button.



If you choose Professional Leave from the drop down menu, another form appears with the needed information for a professional leave.

1. You can enter the location of the event.
2. You can enter the vendor for the event in case a purchase order needs to be made out to the vendor.
3. Enter any information that you want about the request. For example who the purchase order should be made out to for registration or if you are sharing expenses with a co-worker.

A screenshot of the "Professional Leave Details / Expense" form. It has several sections: "Event Location (Address)" with a text area (callout 1), "City", "State", and "Zip Code" fields; "Vendor Location (Address)" with a text area (callout 2), "City", "State", and "Zip Code" fields; "Purpose of Leave / Leave Description" with a large text area (callout 3); and "Estimated Costs" with fields for "Registration Fees", "Lodging Amount", "Meals Amount", "Other Expenses Amount", "Mileage Rate: 0.500 X # of Miles", "Mileage Amount", and "Total Leave Amount" (callout 4). A "Calculate" button is at the bottom right.

4. Enter your expenses. Enter the miles of the proposed trip and the tool will calculate the mileage amount to be reimbursed based on the district entered rate.

5. At the bottom of the Professional Leave Form Part, you may click on Calculate to have it total the expenses entered. *(The fields appearing are set by the administrator, and some features can be added, for instance, the fund code could be added.)*

- Once you have submitted the request for professional leave you have the ability to print a Professional Leave Request Form to submit after your leave so you can enter your actual expenses, attach receipts and submit for reimbursement.

**Professional Leave Request Form**

Today's Date: 11/23/2009

Name: Emily Es Teacher Position: Elementary School Teacher

Start Date: November 30, 2009 Time: 09:00 AM

End Date: November 30, 2009 Time: 03:00 AM

Dates/Times:

Total Leave requested: 1 Day(s)

Reason from Leave Request: Meeting

Location of Meeting: Professional Leave Event: Columbus, OH 43224

Purpose of Meeting: Meeting

Vendor Location: ODE  
Columbus, OH 43221

		Estimated	EXPENSES	Actual
Travel:	150 miles @0.400 per mile:	\$60.00		
	Lodging Amount:	\$0.00		
	Meals Amount:	\$15.00		
	Registration Fees:	\$50.00		
	Other Expenses Amount:	\$10.00		
	<b>Total Expenses Amount:</b>	<b>\$135.00</b>		

\*\* PAID RECEIPTS MUST BE ATTACHED FOR ALL EXPENSES \*\*

If you submit a request that will span multiple days you will then be presented a screen to verify the dates and the leave request for each day.

Leave Request Information

Start Date	Start Time	End Date	End Time	Total Leave Day(s)
08/26/2019	08:00 AM	08/30/2019	04:00 PM	5

[Verify Leave Detail Day\(s\) and Click ACCEPT LEAVE DETAILS button to ADD the request.](#)

Week One

Sunday, August 25, 2019	Monday, August 26, 2019	Tuesday, August 27, 2019	Wednesday, August 28, 2019	Thursday, August 29, 2019	Friday, August 30, 2019	Saturday, August 31, 2019
0	1	1	1	1	1	0

1 - 1

If the date you are entering in your leave request is duplicated in another request you will receive a warning message.

Previously Entered Date Notice

You have a previously entered request that exists within the selected date range.

Please proceed with my request anyway

Yes  No

[Previously Entered Date Exception.](#)

## My Request(s) in Process

You can quickly see all requests, what their status is, and where they fall in the steps toward approval.

Leave Request(s) in Process													
Q													
Go Actions													
	Update	View Approval Status		\$	Job Description	Leave Type Requested	Sub-Category	Status	Substitute Needed	Last Activity Date	Start Date	End Date	Total Leave
Details	Update		-	\$	Payroll Clerk	Professional	-	Flow Initiated Level 1	No	08/08/2019 10:53AM	09/24/2019 08:00AM	09/26/2019 04:00PM	2.5
Details	Update		-	-	Payroll Clerk	Sick Leave	-	Flow Initiated Level 1	No	08/08/2019 10:48AM	08/07/2019 08:00AM	08/07/2019 04:00PM	1
Details	Update		-	-	Payroll Clerk	Sick Leave	-	Flow Initiated Level 1	No	08/12/2019 08:42AM	08/14/2019 08:00AM	08/16/2019 04:00PM	1

You can click on the word 'Details' to see the original request. You will see a non-edit-able view of your original request and can do the following when looking at the details of the request.

1. Escalate (this will send a notification to the HR Admin)
2. Cancel the Request
3. Make Comments
4. Add Attachment
5. Update Request. As long as the first approver has not taken action on your request you have the ability to click update request and make changes to your request and then click the apply changes button. Once a request has had action taken on the request you will not be able to update it.

Leave Request Detail
1 Update Request

Status: **Flow Initiated** Last Activity: 08/08/2019 10:48 AM

Absences PTD: 7 Day(s)

-----

Job: Payroll Clerk

Leave Type: Sick Leave

**Current Balance 44.75 Day(s)**

Reason: sick

Start Date: 08/07/2019

End Date: 08/07/2019

Leave Requested in Day(s): 1,000

Start Time: 08:00 AM

End Time: 04:00 PM

Phone: (444) 555-9998

Full Notification: N

Substitute Needed: N

Substitute Scheduled: N

Comments:

2 Escalate to HR Leave Administrator
3 Cancel Request
4 Apply Comments ONLY

File(s) to Attach

Select File(s) 5

Further to the right you will see the approval process.

When you click on the Update from the My Leave Request(s) in Process screen you have the ability to click update request and make changes to your request and then click the apply changes button. Once a request has had action taken on the request you will not be able to update it.

Leave Request(s) in Process

	Update	View Approval Status		\$	Job Description	Leave Type Requested	Sub-Category	Status	Substitute Needed	Last Activity Date	Start Date	End Date	Total Leave
Details	Update		-	\$	Payroll Clerk	Professional	-	Flow Initiated Level 1	No	08/08/2019 10:53AM	09/24/2019 08:00AM	09/26/2019 04:00PM	2.5
Details	Update		-	-	Payroll Clerk	Sick Leave	-	Flow Initiated Level 1	No	08/08/2019 10:48AM	08/07/2019 08:00AM	08/07/2019 04:00PM	1

Update Leave Request

Reason: PTTD  
7 Day(s)

Initiated: 08/08/2019 10:48 AM

Job: Active - Payroll Clerk

Leave Type: Sick Leave

Balance before request: 44.75 Day(s)

Reason: K12

Start Date (MM/DD/YYYY): 08/07/2019 Start Time: 08:00 AM

End Date (MM/DD/YYYY): 08/07/2019 End Time: 04:00 PM

Leave Requested In Day(s): 1 .000

Phone Where You Can Be Reached (444) 555-9998

Comments pertaining to this Leave Request

Substitute Needed?

Supervisor's Name: Kevin Treasurer  
Request Status: Flow Initiated

Supervisor's Email: treasurer@ncocc.k12.oh.us  
Last Activity: 08/08/2019 10:48 AM

Apply Changes

When you click on the icon from the My Leave Request(s) in Process screen you will see the approval tree and where the request lies in that tree. The tree is set up by the admin.

Leave Request Status Tree

*Grace C Payroll's request for 2.5 Day(s) of Professional from 09/24/2019 08:00 AM to 09/26/2019 04:00 PM*

- Leave Approval Automated Work Flow - Supervisor - All Leave
  - Level 1
    - Supervisor (OR)
      - Samantha ES Secretary(essec@ncocc.k12.oh.us) {View w/Notify}
      - Kevin Treasurer(treasurer@ncocc.k12.oh.us) {Approver}
        - Status: **Initiated on 08/08/2019 at 10:53 AM**
  - Level 2
    - OH School - Superintendent (OR)

Return to Leave Request(s) List

Expand All Collapse All

## My Processed Request(s)

This report reflects those leaves that have been completely processed and are probably in the past. These requests would include those that have been approved and exported to USPS or those requests that have been rejected or cancelled.

- You can filter these requests based on
- Start/End Date
- Leave Type
- Status

Filtering on any of the areas above requires you to click the Action icon to initiate the filter.

Approved & Exported Leave Request(s)													
Q v Go Actions v													
	View Approval Status		\$	Job Description	Leave Type Requested	Sub-Category	Status	Substitute Needed	Last Activity Date	Start Date	End Date	Total Leave	Create Cancellation
Details		-	-	Payroll Clerk	Sick Leave	-	Approved	No	08/12/2019 10:27 AM	08/16/2019 08:00 AM	08/16/2019 04:00 PM	1,000 Day(s)	-
Details		-	-	Payroll Clerk	Sick Leave	-	Approved	No	08/12/2019 10:27 AM	08/07/2019 08:00 AM	08/07/2019 04:00 PM	1,000 Day(s)	-
Details		-	-	Payroll Clerk	Sick Leave	-	Approved	Yes	08/12/2019 10:27 AM	08/15/2017 08:00 AM	08/15/2017 03:00 PM	1,000 Day(s)	-

1 - 3

The sections are divided by Approved and Exported Leave Requests and Cancelled and Rejected Leave Requests

In the Approved and Exported Leave Requests section

Approved & Exported Leave Request(s)													
Q v Go Actions v													
	View Approval Status		\$	Job Description	Leave Type Requested	Sub-Category	Status	Substitute Needed	Last Activity Date	Start Date	End Date	Total Leave	Create Cancellation
Details		-	-	Payroll Clerk	Sick Leave	-	Approved	No	08/12/2019 10:27 AM	08/16/2019 08:00 AM	08/16/2019 04:00 PM	1,000 Day(s)	-
Details		-	-	Payroll Clerk	Sick Leave	-	Approved	Yes	08/12/2019 10:27 AM	08/15/2017 08:00 AM	08/15/2017 03:00 PM	1,000 Day(s)	-
Details		-	-	Payroll Clerk	Sick Leave	-	Exported	No	08/30/2019 08:33 AM	08/07/2019 08:00 AM	08/07/2019 04:00 PM	1,000 Day(s)	

1 - 3

You can click on the word 'Details' to see the original request. You will see a non-edit-able view of their original request and further to the right you will see the transaction history for this request.

When you click on the  icon you will see the approval tree and the date and times the request was approved. The tree is set up by the admin.

You will also see a column with the status of leave request. Exported are requests that have been exported into payroll. Approved requests have been through the approval process but have not been exported to payroll.

If your request has the status of Exported, you have the option to cancel the request by clicking on the X in the Create Cancellation column.

Approved & Exported Leave Request(s)													
<input type="text"/> <input type="button" value="Go"/> <input type="button" value="Actions"/>													
	View Approval Status			Job Description	Leave Type Requested	Sub-Category	Status	Substitute Needed	Last Activity Date	Start Date	End Date	Total Leave	Create Cancellation
Details		-	-	Payroll Clerk	Sick Leave	-	Exported	No	08/30/2019 08:33 AM	08/07/2019 08:00 AM	08/07/2019 04:00 PM	1,000 Day(s)	

When you click the X a leave request will be created and automatically populated with the correct information for the leave cancellation. You can enter comments in the request as to why the request is being cancelled.

Click Submit to create the cancellation request and send it through the approval process.

You may choose how many rows to view by clicking on Actions and selecting Rows Per Page and then select the number of rows you want to display.

New Leave Request

Absences FYTD  
**18.5 Day(s)**

Job  
Active - Payroll Clerk

Leave Type  
Sick Leave

Balance before request **44.75 Day(s)**

Cancellation for Request #:  
**5395296**

Reason  
Negative request to reverse/cancel leave time previously Exported and Posted to USPS. Original Leave Request#:5395296

117 of 1000

Start Date (MM/DD/YYYY)  
08/07/2019

Start Time  
08:00 AM

End Date (MM/DD/YYYY)  
08/07/2019

End Time  
04:00 PM

Leave Requested In Day(s)  
-1 

Phone Where You Can be Reached

## Cancelled Requests

As a supervisor there may be times when you have to deal with cancelled requests. For example with the snow days that happen you may have staff with leave requests on those snow days that now need to be cancelled or reversed since they were actually calamity days. You have choices for dealing with these requests. There are three options depending on the status of the requests, and your district policies will help dictate how they are handled:

1. If the request has NOT yet been approved by any supervisor, then employees can go to My Requests In Process and click on Details of the request, and then click the Cancel Request button.
2. If the request has been approved but not exported, employees can manually create a new request with a negative days/hours increment. So if the original request was for 1 day then this new request would be for -1 day (depending on configuration settings, some districts will use the drop down button to choose " - " then type in 1, some will enter the minus sign manually next to the 1). All other fields would be inputted to be identical to the first request (except maybe reasons/comments).

The screenshot shows a leave request form with the following details:

- Status: Flow Initiated
- Last Activity: 08/30/2019 02:19 PM
- Absences FYTD: 19.5 Day(s)
- Job: Payroll Clerk
- Leave Type: Sick Leave
- Current Balance: 44.75 Day(s)
- Reason: Sick
- Start Date: 08/30/2019, Start Time: 07:00 AM
- End Date: 09/02/2019, End Time: 03:00 PM
- Leave Requested in Day(s): 2.000
- Phone: (444) 555-9998
- Full Notification: N
- Substitute Needed: N
- Substitute Scheduled: N
- Comments: (empty text area)
- Buttons: Escalate to HR Leave Administrator, **Cancel Request** (highlighted with a green arrow), Apply Comments ONLY

3. If the request has been approved and has been exported, then employees can go to My Processed Requests and look for the red 'X' next to their requests in the Create Cancellation column. Clicking the X will automatically create a negative request in one quick step (so it doesn't have to be done manually), and then the request can be submitted for approval.

Approved & Exported Leave Request(s)

View Approval Status	Job Description	Leave Type Requested	Sub-Category	Status	Substitute Needed	Last Activity Date	Start Date	End Date	Total Leave	Create Cancellation
Details	Payroll Clerk	Sick Leave	-	Exported	No	08/30/2019 08:33 AM	08/07/2019 08:00 AM	08/07/2019 04:00 PM	1.000 Day(s)	X

Looking at leave calendars will help you see who has created leave requests on days that ended up being snow days.

## Set Leave Starting & Ending Time Preference

You can enter a starting and ending time preference so that when you go to create a leave request the starting and ending time that you have set as a preference will be automatically entered into the leave request when creating a new request.

1. Enter a starting time
2. Enter an ending time
3. Click Set Default Starting & Ending Time Preferences

Set Default "Start Time" and "End Time" for Leave Requests

Starting Time

01 00

AM

Ending Time

01 00

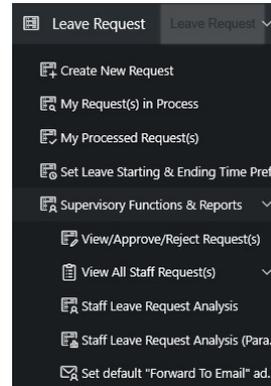
AM

Clear DEFAULT Time Preferences
Set DEFAULT Time Preferences

## Supervisory Functions

There are 4 areas under Leave Request:

- View/Approve/Reject Request(s)
- View All Staff Requests
- Staff Leave Requests Analysis
- Set Default Forward to Email



### View/Approve/Reject Request(s)

When you first click on the link a list of all requests needing action will be displayed. A quick glance will show you the employee who created the request, what the leave type is, if there is an attachment on the request; leave balance, a balance of approved leave that has not been exported to payroll and the start/end date. On the summary screen balances and requested leave will display in red if leave request amount is more than balance.

Select	View Approval Status	Status	Substitute Needed	Last Name	First Name	Full Name	Job Description	Leave Type Requested	Sub Category	Leave Requested	Leave Balance	All Approved Leave Not Exported	Reason	Startdate	Enddate	Initiated
<input type="checkbox"/>	Details	Flow Initiated Level 1	No	Payroll	Grace	Grace C Payroll	Payroll Clerk	Sick Leave	-	2,500 Day(s)	44.75 Day(s)	2.00 Day(s)	sick	10/01/2019 07:00AM	10/03/2019 03:00PM	08/22/2019 11:04AM
<input type="checkbox"/>	Details	Flow Initiated Level 1	No	Payroll	Grace	Grace C Payroll	Payroll Clerk	Sick Leave	-	1,000 Day(s)	44.75 Day(s)	2.00 Day(s)	sick	07/12/2019 07:00AM	07/12/2019 03:00PM	08/23/2019 10:54AM
<input type="checkbox"/>	Details	Flow Initiated Level 1	No	Payroll	Grace	Grace C Payroll	Payroll Clerk	Sick Leave	-	2,000 Day(s)	44.75 Day(s)	2.00 Day(s)	sick	08/30/2019 07:00AM	09/02/2019 03:00PM	08/29/2019 08:45AM

If you want to approve the request without seeing the details you can click on the check box.

Once you have selected the requests to approve you can click on the Approve Selected Leave Request(s) to approve requests in mass.

You cannot mass approve Cancelled and Docked requests. To approve these requests you must click on Details.

The screenshot shows a table with the following columns: Select All, View Approval Status, Status, Substitute Needed, Last Name, First Name, and Full. The first row has a green arrow pointing to the 'Details' link. The status for all three rows is 'Flow Initiated Level 1'.

Select All	View Approval Status	Status	Substitute Needed	Last Name	First Name	Full
<input type="checkbox"/>	<a href="#">Details</a>	Flow Initiated Level 1	No	Payroll	Grace	Grace
<input type="checkbox"/>	<a href="#">Details</a>	Flow Initiated Level 1	No	Payroll	Grace	Grace
<input type="checkbox"/>	<a href="#">Details</a>	Flow Initiated Level 1	No	Payroll	Grace	Grace

To see the details of a specific request click on the details link.

The screenshot shows a table with the following columns: Select All, View Approval Status, Status, Substitute Needed, Last Name, and First Name. The first row has a green arrow pointing to the 'Details' link. The status for all three rows is 'Flow Initiated Level 1'.

Select All	View Approval Status	Status	Substitute Needed	Last Name	First Name
<input type="checkbox"/>	<a href="#">Details</a>	Flow Initiated Level 1	No	Payroll	Grace
<input type="checkbox"/>	<a href="#">Details</a>	Flow Initiated Level 1	No	Payroll	Grace
<input type="checkbox"/>	<a href="#">Details</a>	Flow Initiated Level 1	No	Payroll	Grace

You can see all the details of the request including the date and time the request was initiated and any other action that has been taken on the request. You have different options when viewing the request.

1. You can add comments only to a request without approving the request. Type your comments in the comments field and click on the Add Comments Only button.
2. If you have the Sub Coordinator or Sub Coordinator by Building role you have the ability to enter substitute information for the leave request. To enter the information check the Substitute Needed box.
3. Enter the first name of the substitute.
4. Enter the last name of the substitute.
5. Enter any comments related to the substitute.
6. If you want to enter comments only click on Add Comments only after you have typed them in the Comments section.
7. You can approve the request by clicking on the Approve button.
8. You can reject the request by clicking on the Reject button.
9. To see other requests for this staff person for the leave type that was specified in the request click on All XXX Leave Requests for User.
10. To see all requests for this specific date click on All Requests for Date(s) Requested
11. To return to the View/Approve/Reject screen click on Close Window.

Leave Approval Request Details

<p>Name: Grace C Payroll</p> <p>Initiated: 08/30/2019 09:20 AM</p> <p>Job: Payroll Clerk</p> <p>Leave Type: Sick Leave</p> <p style="color: red; font-weight: bold;">Current Balance 44.75 Day(s)</p> <p>Reason: Dr. Appointment</p> <p>Start Date: 09/13/2019</p> <p>End Date: 09/13/2019</p> <p>Leave Requested In Day(s) : 1.000</p> <p>Comments: <span style="font-size: small;">(0)</span></p> <p><input checked="" type="checkbox"/> Substitute Needed?</p> <p><input type="checkbox"/> Substitute Scheduled?</p> <p>First Name <input type="text"/></p> <p>Last Name <input type="text"/></p>	<p>Start Time: 07:00 AM</p> <p>End Time: 04:00 PM</p> <p>Phone: (444) 555-9998</p>
--	--

Add Comments ONLY
Approve
Reject

When the supervisor clicks on details, a red warning message will display letting the supervisor know that approving the request will take the balance in the negative.

## View All Staff Request(s)

When you first click on the link a list of all requests will be displayed. The requests that will be displayed will be for those staff members that you supervise. The requests will be broken down into the following sections:

- View All Unprocessed Leave Requests for Staff.
- View All Approved & Exported Leave Requests for Staff.
- View All Cancelled & Rejected Leave Requests for Staff.

View All Unprocessed Leave Requests for Staff

Q Go Actions

Start Date is in the last 1 months

	Show Approval Flow		Employee ID	Last Name	First Name	Full Name	Leave Type	Sub Category	Job Desc	Start Date	End Date	Leave Requested	Leave Unit	Status	Substitute Needed	Substitute Information	Scheduled Sub Last Name	Scheduled Sub First Name	Date of Last Activity	Approval Names and Dates
Details		-	HE0000100	Payroll	Grace	Grace C Payroll	Sick Leave	-	Payroll Clerk	08/30/2019 07:00 AM	09/02/2019 03:00 PM	2.000	Day(s)	Flow Initiated Level 1	No	-	-	-	08/29/2019 08:45 AM	-
Details		-	HE0000100	Payroll	Grace	Grace C Payroll	Professional	-	Payroll Clerk	08/20/2019 09:00 AM	08/22/2019 04:00 PM	2.500	Day(s)	Flow In Process Level 2	No	-	-	-	08/27/2019 09:19 AM	Kevin Treasurer 08/27/2019
Details		-	HE0000100	Payroll	Grace	Grace C Payroll	Sick Leave	-	Payroll Clerk	08/06/2019 07:00 AM	08/06/2019 03:00 PM	1.000	Day(s)	Flow In Process Level 2	No	-	-	-	08/27/2019 10:48 AM	Kevin Treasurer 08/27/2019

1 - 3

PRINT Unprocessed Filtered Requests    Email Notification for Filtered Requests

You can filter the information on this screen by clicking on the Actions button.

All the displays on this screen can be downloaded as a csv or html.

## Staff Leave Request Analysis

The display will give you a quick snapshot of each employee(s) accrual, maximum accrual amount, used and balances for each leave type. Only the employees that you supervise will be displayed.

To see all the requests for a specific employee click on the See All Leave link.

Your Employees

Q Go Rows: 10 Actions

See All Leave for Selected

Select All		Last Name	First Name	Middle Name	Sick Accrual	Sick Max	Sick Balance	Sick Approved not Exported	Vacation Accrual	Vacation Max	Vacation Balance	Vacation Approved not Exported	Personal Max	Personal Beginning Balance	Personal Balance	Personal Approved not Exported	Unit
<input type="checkbox"/>	See All Leave	Payroll	Grace	C	1.25	200.00	44.75	2	0.834	18.00	6.838	0	3.00	3.00	2.00	0	Daily
<input type="checkbox"/>	See All Leave	Treasurer	Kevin	-	1.25	200.00	138.75	0	1.25	15.00	5.00	0	3.00	3.00	3.00	0	Daily

1 - 2 of 2

You can also select multiple employees by putting a check in the box next to the employee name and then clicking See All Leave for Selected.

Employee Leave Analysis

Last Name	First Name	Middle Name	Status	Leave Type	Start Date	End Date	Requested Date	Total Leave	Leave Unit	Reason	Substitute Needed	Substitute Information	Scheduled Sub Last Name	Scheduled Sub First Name	Manager First Name	Manager Middle Name	Last Activity	Job
Payroll	Grace	C	Approved	Sick Leave	08/16/2019	08/16/2019	08/12/2019	1	Day(s)	sick	No	-	-	-	Kevin	N/A	08/12/2019	1 - Payroll Clerk
Payroll	Grace	C	Flow Initiated	Calamity	01/25/2013	01/25/2013	01/25/2013	1	Day(s)	-	Yes	-	-	-	Kevin	N/A	04/25/2014	1 - Payroll Clerk
Payroll	Grace	C	Exported	Sick Leave	08/07/2019	08/07/2019	08/08/2019	1	Day(s)	sick	No	-	-	-	Kevin	N/A	08/30/2019	1 - Payroll Clerk
Payroll	Grace	C	Flow In-Process	Professional	09/24/2019	09/25/2019	08/08/2019	2.5	Day(s)	pd	No	-	-	-	Kevin	N/A	08/27/2019	1 - Payroll Clerk
Payroll	Grace	C	Flow In-Process	Sick Leave	08/06/2019	08/06/2019	08/22/2019	1	Day(s)	sick	No	-	-	-	Kevin	N/A	08/27/2019	1 - Payroll Clerk
Payroll	Grace	C	Flow In-Process	Sick Leave	09/16/2019	09/18/2019	08/22/2019	2.5	Day(s)	sick	No	-	-	-	Kevin	N/A	08/28/2019	1 - Payroll Clerk
Payroll	Grace	C	Flow In-Process	Professional	08/20/2019	08/22/2019	08/06/2019	2.5	Day(s)	Professional	No	-	-	-	Kevin	N/A	08/27/2019	1 - Payroll Clerk
Payroll	Grace	C	Flow In-Process	Vacation Leave	09/23/2019	09/25/2019	08/13/2019	2.5	Day(s)	vacation	No	-	-	-	Kevin	N/A	08/27/2019	1 - Payroll Clerk
Payroll	Grace	C	Flow In-Process	Professional	08/31/2017	08/31/2017	08/31/2017	1	Day(s)	TESr	No	-	-	-	Kevin	N/A	08/27/2019	1 - Payroll Clerk

All the information on this screen can be downloaded as a csv, html or pdf.

### Set Default "Forward to Email" Address

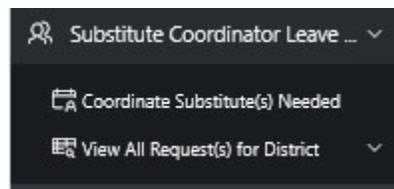
This functionality really creates a mini approval work-flow. If the "Default Forward to Email Address" is set when a supervisor views a request that is assigned to the "Default Approval" workflow, the system will populate the "Forward To Email:" automatically. Once the supervisor approves the request it will be marked with an "Approved and Forwarded" status and be forwarded to this email address person for their approval. The request will not be ready for export to USPS until the person the request was forwarded to approves it.

## SUBSTITUTE COORDINATOR LEAVE REPORTS

### Viewing Substitute Requests

To view requests that have the Substitute Needed box checked.

1. Click on Substitute Coordinator Leave
2. Coordinate Substitute(s) Needed.



Reports.

The top section, District Leave Requests Requiring a Substitute, will display leave requests where the Substitute Needed box was checked for future dates. Any comments that the employee put on the request about the substitute will be displayed. You can sort on any column that is underlined.

This page will reload in 03:54

Filter All Reports

Appointment Type: All | First or Last Name: [ ] | Clear Name | Filter

Include "Exported" Leave Requests for "Past Dates" reports

Note: \* denotes that Substitute Assignment is handled outside of the Kiosk.

District Leave Requests requiring a Substitute

Employee Last Name	Employee First Name	Employee Full Name	Building Name	Substitute Information	Approval Comments	Start Date	End Date	Leave Type	Employee Appointment Type	Leave Requested	Job Description	Employee Phone	Leave Status	Manager Email	Manager Last Name	Manager First Name	Manager Full Name
Payroll	Grace	Grace C Payroll	-	-	-	09/13/2019	09/13/2019	Sick Leave	Classified	1,000 Day(s)	Payroll Clerk	(444) 555-9998	Flow Initiated	treasurer@noccc.k12.oh.us	Treasurer	Kevin	Kevin Treasurer

1 - 1

PRINT District Leave Requests requiring a Substitute

When scheduling a substitute you can now filter leave requests by clicking on the Actions button.

1. To schedule a substitute click on Details.
2. Click on the checkbox next to Substitute Scheduled.
3. Enter the substitute information.

The information typed in will be displayed for the employee and supervisor. Anytime the substitute information is updated the employee will receive and email notification.

Leave Approval Request Details

Initiated: 08/30/2019 09:20 AM

Job: Payroll Clerk

Leave Type: Sick Leave

**Current Balance 44.75 Day(s)**

Reason: Dr Appointment

Start Date: 09/13/2019 | Start Time: 07:00 AM

End Date: 09/13/2019 | End Time: 04:00 PM

Leave Requested in Day(s): 1,000 | Phone: (444) 555-9998

Comments: [ ]

Substitute Needed?

Substitute Scheduled? 1

First Name: Sarah

Last Name: Jones 2

Every four minutes the Schedule Substitute screen will refresh so that new requests that are made will display for the substitute coordinator.

The second section, District Leave Requests Requiring a Substitute – Past Dates, will display leave requests where the Substitute Needed box was checked for past dates. Any comments that the employee put on the request about the substitute will be displayed. You can sort on any column that is underlined.

District Leave Requests requiring a Substitute - Past Dates

Employee Last Name	Employee First Name	Employee Full Name	Building Name	Substitute Information	Approval Comments	Startdate	Enddate	Leave Type	Employee Appointment Type	Leave Requested	Job Description	Employee Phone	Leave Status	Manager Email	Manager Last Name	Manager First Name	Manager Full Name
Payroll	Grace	Grace C Payroll	-	-	Approved: Mass Approval	06/15/2017	08/15/2017	Sick Leave	Classified	1,000 Day(s)	Payroll Clerk	(444) 555-9998	Approved	DELETED_treasurer@nccock12.oh.us	Treasurer	Kevin	Kevin Treasurer

1. To schedule a substitute click on Details.
2. Click on the checkbox next to Substitute Scheduled.
3. Enter the substitute information.

The third section, District Leave Requests with a Substitute Scheduled will display any leave requests where the substitute has already been scheduled. The substitute information that was entered on the request will be displayed. To display the substitutes scheduled you will need to enter a date range and click Go.

Filter by Date Range

Starting Date: 07/31/2019    Ending Date:    [Go](#)

District Leave Requests with a Substitute Scheduled

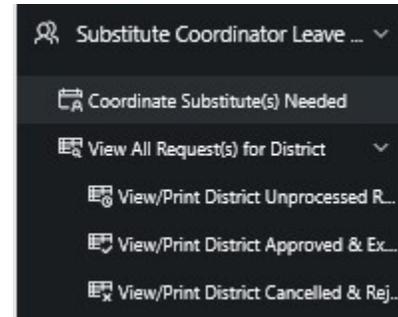
Employee Last Name	Employee First Name	Employee Full Name	Building Name	Scheduled Sub Last Name	Scheduled Sub First Name	Substitute Information	Approval Comments	Start Date	End Date	Leave Type	Employee Appointment Type	Leave Requested	Employee Phone	Job Description	Leave Status	Manager Email	Manager Last Name	Manager First Name	Manager Full Name
Payroll	Grace	Grace C Payroll	-	Jones	Sarah	-	-	09/13/2019	09/13/2019	Sick Leave	Classified	1,000 Day(s)	(444) 555-9998	Payroll Clerk	Flow Initiated	treasurer@nccock12.oh.us	Treasurer	Kevin	Kevin Treasurer

To see more details of the request or make additional comments click on Details.

## Viewing All Requests

You can view all requests for the district if you have the substitute coordinator role assigned. You have the option to view

- Unprocessed Requests
- Approved & Exported Requests
- Cancelled & Rejected Requests



### View/Print District Unprocessed Request(s)

The requests in this section will be requests that are somewhere within the approval process.

View All Unprocessed Leave Requests for District

Start Date: 09/01/2019 09:26 AM

Show Approval Flow	Employee ID	Last Name	First Name	Full Name	Leave Type	Sub Category	Job Desc	Start Date	End Date	Leaves Requested	Leave Unit	Status	Substitute Needed	Substitute Information	Scheduled Sub Last Name	Scheduled Sub First Name	Date of Last Activity	Approval Names and Dates
Details	HED000100	Payroll	Grace	Grace C Payroll	Sick Leave	-	Payroll Clerk	10/01/2019 07:00 AM	10/03/2019 03:00 PM	2,500	Day(s)	Flow Initiated Level 1	No	-	-	-	08/22/2019 11:04 AM	-
Details	HED000100	Payroll	Grace	Grace C Payroll	Sick Leave	-	Payroll Clerk	08/13/2019 07:00 AM	08/13/2019 04:00 PM	1,000	Day(s)	Flow Initiated Level 1	Scheduled	<nobr> Jones </nobr>	<nobr> Sarah </nobr>	08/30/2019 10:04 AM	-	
Details	HED000100	Payroll	Grace	Grace C Payroll	Professional	-	Payroll Clerk	09/24/2019 08:00 AM	09/25/2019 04:00 PM	2,500	Day(s)	Flow In-Process Level 2	No	-	-	-	08/27/2019 09:19 AM	Kevin Treasurer 08/27/2019
Details	HED000100	Payroll	Grace	Grace C Payroll	Vacation Leave	-	Payroll Clerk	09/23/2019 08:00 AM	09/25/2019 04:00 PM	2,500	Day(s)	Flow In-Process Level 2	No	-	-	-	08/27/2019 09:19 AM	Kevin Treasurer 08/27/2019
Details	HED000100	Payroll	Grace	Grace C Payroll	Sick Leave	-	Payroll Clerk	08/18/2019 07:00 AM	08/18/2019 03:00 PM	2,500	Day(s)	Flow In-Process Level 2	No	-	-	-	08/28/2019 02:07 PM	Kevin Treasurer 08/28/2019

1 - 5

PRINT Unprocessed Filtered Requests | Email Notification for Filtered Requests

You can now filter leave requests by clicking on the Actions button.

### View/Print District Approved & Exported Request(s)

The requests in this section will be requests that have the status of either approved or exported. When you first view these requests it will display requests from the last 30 days. If you want to see a different date range you can delete the information in the starting date field and then click Go or put in your own date range.

View All Approved & Exported Leave Requests for District

Start Date is in the last 1 months

Show Approval Flow	Employee ID	Last Name	First Name	Full Name	Job Desc	Leave Type	Sub Category	Start Date	End Date	Leaves Requested	Leave Unit	Status	Substitute Needed	Substitute Information	Scheduled Sub Last Name	Scheduled Sub First Name	Date of Last Activity	Approval Names and Dates
Details	HED000100	Payroll	Grace	Grace C Payroll	Payroll Clerk	Sick Leave	-	08/07/2019 08:00 AM	08/07/2019 04:00 PM	1,000	Day(s)	Exported	No	-	-	-	08/30/2019 08:33 AM	Kevin Treasurer 08/12/2019 Adam K. Superintendent 08/12/2019
Details	HED000100	Payroll	Grace	Grace C Payroll	Payroll Clerk	Sick Leave	-	08/16/2019 08:00 AM	08/16/2019 04:00 PM	1,000	Day(s)	Approved	No	-	-	-	08/12/2019 10:27 AM	Kevin Treasurer 08/12/2019 Adam K. Superintendent 08/12/2019

1 - 2

PRINT Approved/Exported Filtered Requests | Email Notification for Filtered Requests

You can now filter leave requests by clicking on the Actions button.

## View/Print District Cancelled & Rejected Request(s)

The requests in this section will be requests that have the status of either cancelled or rejected. When you first view these requests it will display requests from the last 30 days. If you want to see a different date range you can delete the information in the starting date field and then click Go

View All Cancelled & Rejected Leave Requests for District

Start Date is in the last 1 months

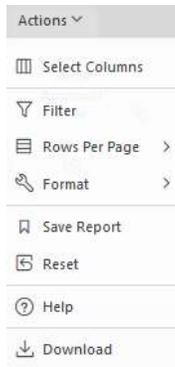
	Show Approval Flow			Employee ID	Last Name	First Name	Full Name	Job Desc	Leave Type	Sub Category	Start Date	End Date	Leave Requested	Leave Unit	Status	Substitute Needed	Substitute Information	Scheduled Sub Last Name	Scheduled Sub First Name	Date of Last Activity	Approval Names and Dates
Details		-	-	HE0000100	Payroll	Grace	Grace C Payroll	Payroll Clerk	Sick Leave	-	08/02/2019 08:00 AM	08/02/2019 04:00 PM	1.000	Day(s)	Cancelled	No	-	-	-	08/06/2019 10:18 AM	-
Details		-	-	HE0000100	Payroll	Grace	Grace C Payroll	Payroll Clerk	Sick Leave	-	08/12/2019 08:00 AM	08/12/2019 04:00 PM	1.000	Day(s)	Cancelled	No	-	-	-	08/13/2019 08:12 AM	-

1 - 2

PRINT Cancelled/Rejected Filtered Requests    Email Notification for Filtered Requests

## Using the Actions Functionality within Reports

### Actions

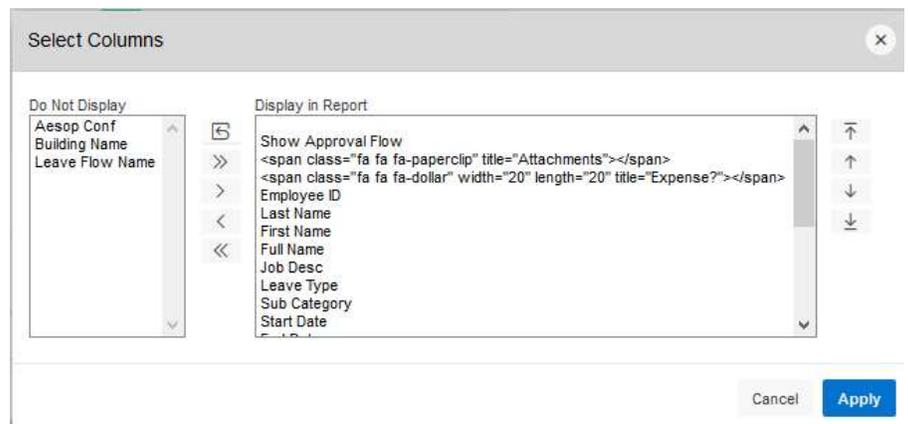


### Select Columns

Select Columns will allow you to which columns are displayed in your report.

The columns that are currently not being displayed on the report are displayed on the left.

Moving them to the right allows that column to be displayed and filtered on.



## Filter

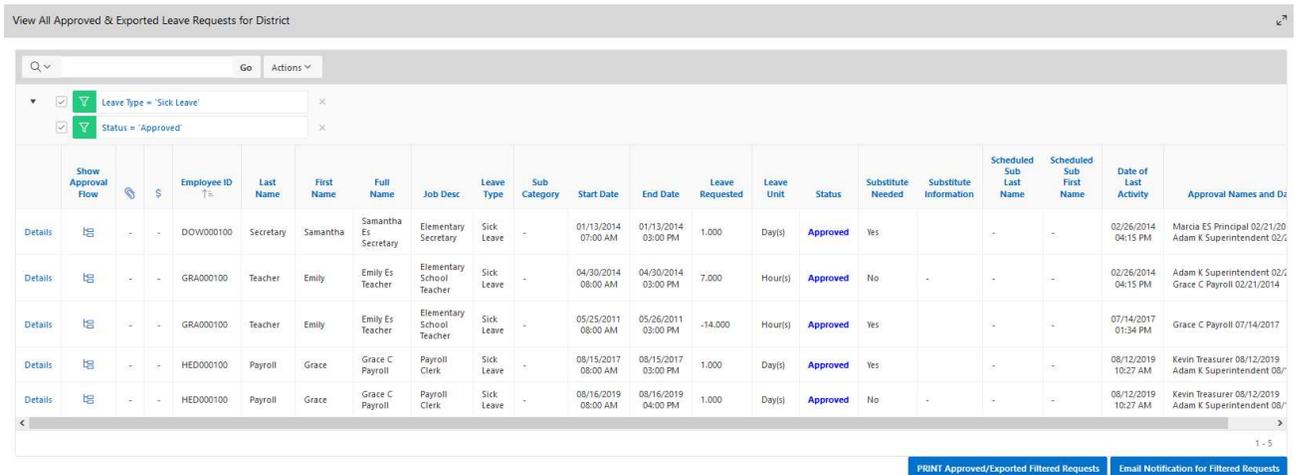
Filter will allow you to take the columns that you see in the report and narrow your results based on those columns.

Under column you choose what you want to filter on, such as start date, end date, leave type, substitute needed, etc.



Based on the column filter you use you then will be prompted to select an operator like =, >, <, etc...

You can have multiple filters. In the example below, the filter was used to display just requests for sick leave that were greater than 1 day. To remove a filter you can click on the red X.

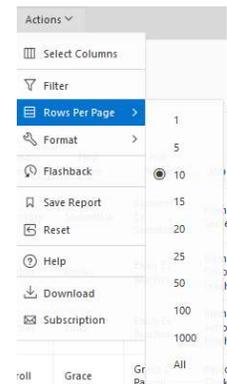


	Show Approval Flow		Employee ID	Last Name	First Name	Full Name	Job Desc	Leave Type	Sub Category	Start Date	End Date	Leave Requested	Leave Unit	Status	Substitute Needed	Substitute Information	Scheduled Sub Last Name	Scheduled Sub First Name	Date of Last Activity	Approval Names and Dates
Details		-	DOW000100	Secretary	Samantha	Samantha Es Secretary	Elementary Secretary	Sick Leave	-	01/13/2014 07:00 AM	01/13/2014 03:00 PM	1.000	Day(s)	Approved	Yes	-	-	-	02/26/2014 04:15 PM	Marcia ES Principal 02/21/2014 Adam K Superintendent 02/21/2014
Details		-	GRA000100	Teacher	Emily	Emily Es Teacher	Elementary School Teacher	Sick Leave	-	04/30/2014 08:00 AM	04/30/2014 03:00 PM	7.000	Hour(s)	Approved	No	-	-	-	02/26/2014 04:15 PM	Adam K Superintendent 02/21/2014 Grace C Payroll 02/21/2014
Details		-	GRA000100	Teacher	Emily	Emily Es Teacher	Elementary School Teacher	Sick Leave	-	05/25/2011 08:00 AM	05/26/2011 03:00 PM	-14.000	Hour(s)	Approved	Yes	-	-	-	07/14/2017 01:34 PM	Grace C Payroll 07/14/2017
Details		-	HED000100	Payroll	Grace	Grace C Payroll	Payroll Clerk	Sick Leave	-	08/15/2017 08:00 AM	08/15/2017 03:00 PM	1.000	Day(s)	Approved	Yes	-	-	-	08/12/2019 10:27 AM	Kevin Treasurer 08/12/2019 Adam K Superintendent 08/12/2019
Details		-	HED000100	Payroll	Grace	Grace C Payroll	Payroll Clerk	Sick Leave	-	08/16/2019 08:00 AM	08/16/2019 04:00 PM	1.000	Day(s)	Approved	No	-	-	-	08/12/2019 10:27 AM	Kevin Treasurer 08/12/2019 Adam K Superintendent 08/12/2019

## Rows Per Page

Select Columns will allow you to select the number of rows that are displayed on the current report you are viewing.

The rows per page preference is not saved when you exit the report.



## Format Options

### Sort

Sort will allow you to take the display that you see in the employee leave analysis section and sort your results.

You can have multiple sorts on the information.

### Control Break

Control Break will allow you to take the display that you see in the employee leave analysis section and create breaks in the data. For example if you do a control break on leave type, each leave will have a heading and all requests for the leave type will be displayed under that heading. You can have multiple control breaks on the information.

**Control Break** ✕

Column	Status
1 - Select Column -	Enabled
2 - Select Column -	Enabled
3 - Select Column -	Enabled
4 - Select Column -	Enabled
5 - Select Column -	Enabled
6 - Select Column -	Enabled

View All Approved & Exported Leave Requests for District

Q Go Actions

Status = Approved

Leave Type

Leave Type : Compensatory Time

	Show Approval Flow		Employee ID	Last Name	First Name	Full Name	Job Desc	Sub Category	Start Date	End Date	Leave Requested	Leave Unit	Status	Substitute Needed	Substitute Information	Scheduled Sub Last Name	Scheduled Sub First Name	Date of Last Activity	Approval N
Details		-	GRA000100	Teacher	Emily	Emily Es Teacher	Elementary School Teacher	-	08/13/2010 03:00 PM	08/13/2010 05:00 PM	2,000	Hour(s)	Approved	No	-	-	-	08/13/2010 03:31 PM	Grace C Payroll Adam K Superin Marcia ES Princ
Details		-	GRA000100	Teacher	Emily	Emily Es Teacher	Elementary School Teacher	-	08/23/2010 03:00 PM	08/23/2010 06:00 PM	3,000	Hour(s)	Approved	No	-	-	-	08/13/2010 03:31 PM	Grace C Payroll Adam K Superin Marcia ES Princ

Leave Type : Personal Leave

	Show Approval Flow		Employee ID	Last Name	First Name	Full Name	Job Desc	Sub Category	Start Date	End Date	Leave Requested	Leave Unit	Status	Substitute Needed	Substitute Information	Scheduled Sub Last Name	Scheduled Sub First Name	Date of Last Activity	Approval N
Details		-	ABL000100	Principal	Marcia	Marcia Es Principal	Elementary Principal	-	06/04/2013 12:00 PM	06/06/2013 04:00 PM	1,500	Day(s)	Approved	Scheduled	-	<nobr>Smith</nobr>	<nobr>Jim</nobr>	12/03/2015 11:09 AM	Adam K Superin Adam K Superin Adam K Superin
Details	Default Approval	-	GRA000100	Teacher	Emily	Emily Es Teacher	Elementary School Teacher	-	02/21/2014 08:00 AM	02/22/2014 03:00 PM	7,000	Hour(s)	Approved (Blackout Date)	No	-	-	-	05/19/2015 11:31 AM	Grace C Payroll
Details	Default Approval	-	GRA000100	Teacher	Emily	Emily Es Teacher	Elementary School	P2 -	04/15/2011 07:00 AM	04/15/2011 03:00 PM	8,000	Hour(s)	Approved (Blackout)	No	-	-	-	05/19/2015 11:30 AM	Grace C Payroll

### Highlight

Highlight will allow you to take the display that you see in the employee leave analysis section and highlight the specific data. You can select the background and text color and whether or not you want a row or cell highlighted. For example if you want to highlight all the sick leave you would select the column of sick leave and use the operator of = and the expression of sick leave. All the sick leave would be highlighted with the colors you chose.

**Highlight** ✕

Name

Sequence

Enabled

Highlight Type

Background Color   [yellow][green][blue][orange][red]

Text Color   [yellow][green][blue][orange][red]

Highlight Condition

Column	Operator	Expression
Leave Type	=	

View All Approved & Exported Leave Requests for District

Q  Go Actions

Status = Approved  
 Leave Type  
 Leave Type = Compensatory Time

Leave Type: Compensatory Time

Show Approval Flow	Employee ID	Last Name	First Name	Full Name	Job Desc	Sub Category	Start Date	End Date	Leave Requested	Leave Unit	Status	Substitute Needed	Substitute Information	Scheduled Sub Last Name	Scheduled Sub First Name	Date of Last Activity	Approval N
Details	GRA000100	Teacher	Emily	Emily Es Teacher	Elementary School Teacher	-	08/13/2010 03:00 PM	08/13/2010 03:00 PM	2,000	Hour(s)	Approved	No	-	-	-	08/13/2010 03:31 PM	Grace C Payroll Adam K Supertr Marcia ES Princ
Details	GRA000100	Teacher	Emily	Emily Es Teacher	Elementary School Teacher	-	08/23/2010 03:00 PM	08/23/2010 06:00 PM	3,000	Hour(s)	Approved	No	-	-	-	08/13/2010 03:31 PM	Grace C Payroll Adam K Supertr Marcia ES Princ

Leave Type: Personal Leave

Show Approval Flow	Employee ID	Last Name	First Name	Full Name	Job Desc	Sub Category	Start Date	End Date	Leave Requested	Leave Unit	Status	Substitute Needed	Substitute Information	Scheduled Sub Last Name	Scheduled Sub First Name	Date of Last Activity	Approval N	
Details	ABL000100	Principal	Marcia	Marcia Es Principal	Elementary Principal	-	06/04/2015 12:00 PM	06/06/2015 04:00 PM	1,500	Day(s)	Approved	Scheduled	-	<nobr>Smith</nobr>	<nobr>Jim</nobr>	12/03/2015 11:09 AM	Adam K Supertr Adam K Supertr Adam K Supertr	
Details	Default Approval	GRA000100	Teacher	Emily	Emily Es Teacher	Elementary School Teacher	-	02/21/2014 08:00 AM	02/22/2014 03:00 PM	7,000	Hour(s)	Approved (Blackout Date)	No	-	-	-	05/19/2015 11:31 AM	Grace C Payroll
Details	Default Approval	GRA000100	Teacher	Emily	Emily Es Teacher	Elementary School Teacher	P2	04/15/2011 07:00 AM	04/15/2011 03:00 PM	8,000	Hour(s)	Approved (Blackout Date)	No	-	-	-	05/19/2015 11:32 AM	Grace C Payroll

You can have multiple highlights. To remove a highlight you can click on the X.

### Compute

Compute will allow you to take the display that you see in the employee leave analysis section and computed columns to your report.

Compute

Computation:

Column Label:  Format Mask:

Computation Expression:

Columns	Keypad	Functions / Operators
A. Show Approval Flow	( ) * /	= < >
B. Leave Flow Name	7 8 9	<= >=
C. Employee ID	4 5 6 +	=
D. Full Name	1 2 3 *	>
E. Last Name	0 . /	>=
	space .	ABS

Create a computation using column aliases. Examples:

```

+ (B+C)*100
+ INITCAP(B)||', '||INITCAP(C)
+ CASE WHEN A = 10 THEN B + C ELSE B END
+ SQUAD(C / 1000000)
  
```

Cancel Apply

### Aggregate

Aggregate will allow you to take the display that you see in the employee leave analysis section and select specific functions such as count, sum, average, etc. You can use the aggregate multiple times with the same information. Once you choose your function, your information will be displayed on the last line. See example below where a count was done on Total Leave.

Aggregate

Aggregation:

Function:

Column:

Cancel Apply

### Chart

Chart will allow you to take the display that you see in the employee leave analysis section and see that data as a chart. The available chart types are horizontal bar, vertical bar, pie or line.

The Chart dialog box includes a 'Chart Type' section with icons for horizontal bar, vertical bar, pie, and line. Below this are dropdown menus for 'Label', 'Value', 'Function', and 'Sort'. To the right, there are input fields for 'Axis Title for Label' and 'Axis Title for Value', and a dropdown for 'Orientation' set to 'Vertical'. 'Cancel' and 'Apply' buttons are at the bottom right.

### Group By

Group by will allow you to group the data on your report by a specific column and then create a sum, average, median, maximum, or count on that data.

The Group By dialog box features a dropdown for 'Select Group By Column' with an 'Add Group By Column' link. Below is a table with columns: Functions, Column, Label, Format Mask, and Sum. The first row contains dropdowns for 'Select Function' and 'Select Column', followed by input fields for 'Label' and 'Format Mask', and a 'Sum' checkbox. An 'Add Function' link is below the table. 'Cancel' and 'Apply' buttons are at the bottom right.

### Pivot

Pivot reports transpose rows into columns to generate results in a crosstab format.

Select pivot columns and rows and then provide the functions to be represented in the pivot report

The Pivot dialog box has sections for 'Pivot Columns' and 'Row Columns', each with a dropdown and an 'Add' link. Below is a table with columns: Functions, Column, Label, Format Mask, and Sum. The first row contains dropdowns for 'Select Function' and 'Select Column', followed by input fields for 'Label' and 'Format Mask', and a 'Sum' checkbox. An 'Add Function' link is below the table. 'Cancel' and 'Apply' buttons are at the bottom right.

### Flashback

Flashback will allow you to view data as it existed at a previous point in time. Enter the time in minutes and you will see the data as it appeared at that point.

The Flashback dialog box contains a text area with the message: 'A flashback query allows you to view the data as it existed at a previous point in time. As of [input field] minutes ago.' 'Cancel' and 'Apply' buttons are at the bottom right.

### **Save Report**

Once you have generated a report with the results you want, you have the option to save the report for future use. Once you click on the save report you will be prompted to enter a report name and description.



A dialog box titled "Save Report" with a close button (X) in the top right corner. It contains two text input fields: "Name" with the text "My Report" and "Description" which is empty. At the bottom right, there are two buttons: "Cancel" and "Apply".

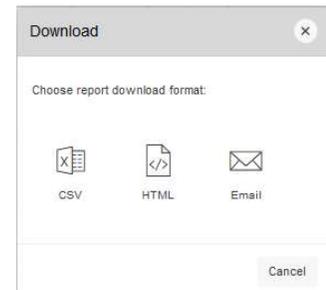
The next time you go into the interactive reports, the report you will saved will be available on a tab for you to view.

### **Reset**

Reset will reset the report to its default settings in case you just need to start over.

### **Download**

Download will allow you to save the report as a csv, html, email, or PDF. These options vary based on the report you are viewing.



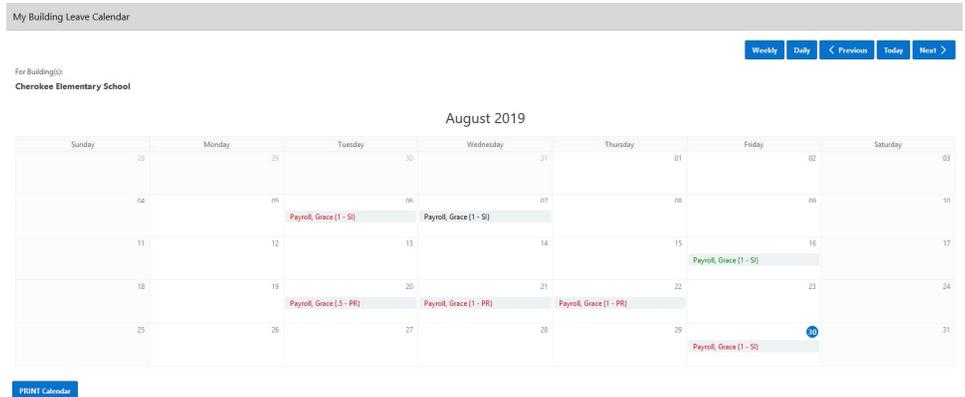
A dialog box titled "Download" with a close button (X) in the top right corner. It contains the text "Choose report download format:" followed by three icons: a CSV file icon labeled "CSV", an HTML file icon labeled "HTML", and an email icon labeled "Email". At the bottom right, there is a "Cancel" button.

## VIEW CALENDARS

Based on your role in the district it will determine what calendars you will be able to view.

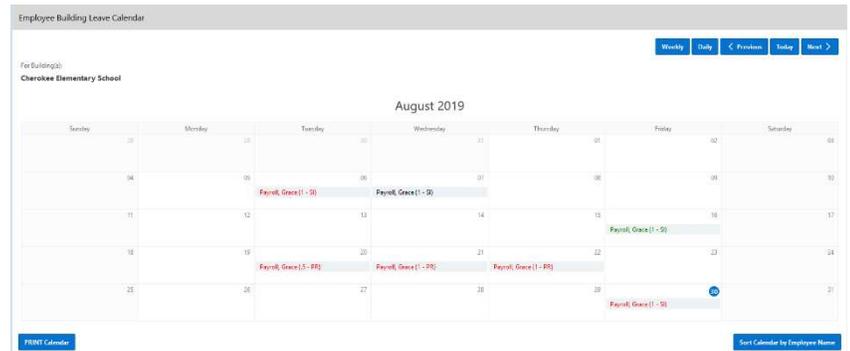
### My Calendar

Each employee will have a link for My Calendar, so that they can see their leave requests in a calendar view.



### Leave Calendar by Building

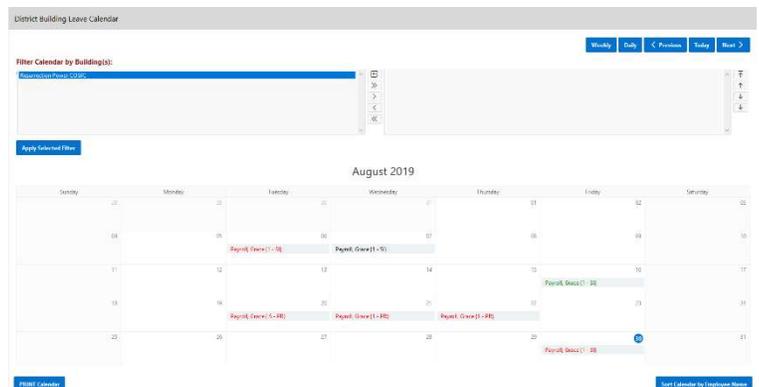
Will display leave requests for the building IRN you are assigned to in USPS. If a request is red it means the request is going through the approval process. If a request is green that means the request has been completely approved or exported.



### Leave Calendar by District Building

Will display leave requests based on the building(s) that you specify. If a request is red it means the request is going through the approval process. If a request is green that means the request has been completely approved or exported.

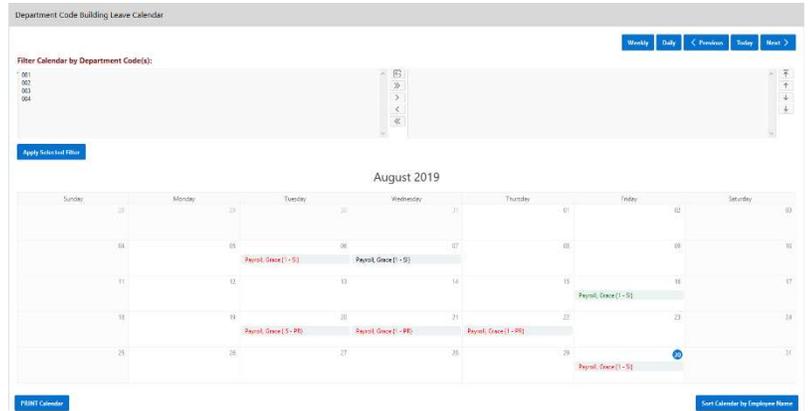
1. Select the building you want to view.
2. Click on the > arrow pointing to the right.
3. Click Apply Selected Buildings to filter.



## Leave Calendar by Department Code

Will display leave requests based on the department code(s) that you specify. If a request is red it means the request is going through the approval process. If a request is green that means the request has been completely approved or exported.

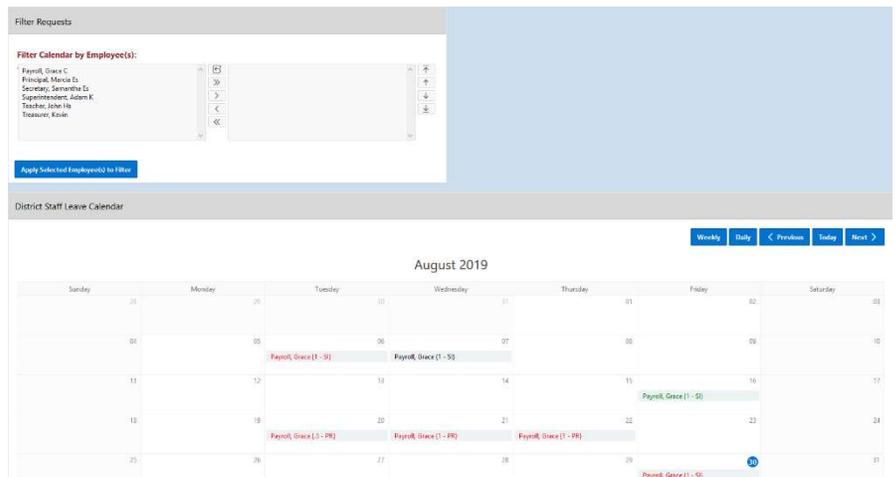
1. Select the department you want to view.
2. Click on the > arrow pointing to the right.
3. Click Apply Selected Buildings to filter.



## Leave Calendar by District Staff

Will display leave requests based on the staff that you specify. If a request is red it means the request is going through the approval process. If a request is green that means the request has been completely approved or exported.

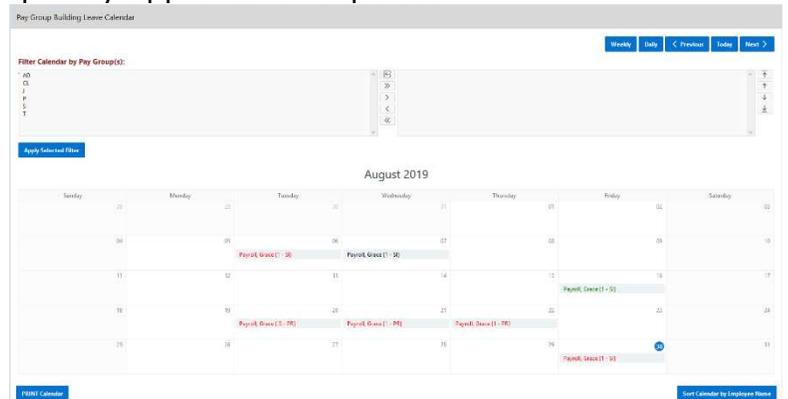
1. Select the staff person you want to view.
2. Click on the > arrow pointing to the right.
3. Click Apply Selected Employee(s) to filter.
4. You can also enter a date range to display leave requests in the calendar view for a specific date range.



## Leave Calendar by Pay Group

Will display leave requests based on the pay group(s) that you specify. If a request is red it means the request is going through the approval process. If a request is green that means the request has been completely approved or exported.

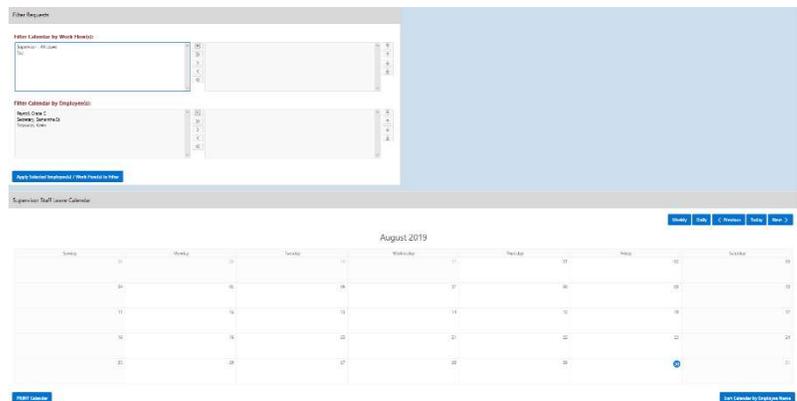
1. Select the pay group you want to view.
2. Click on the > arrow pointing to the right.
3. Click Apply Selected Buildings to filter.



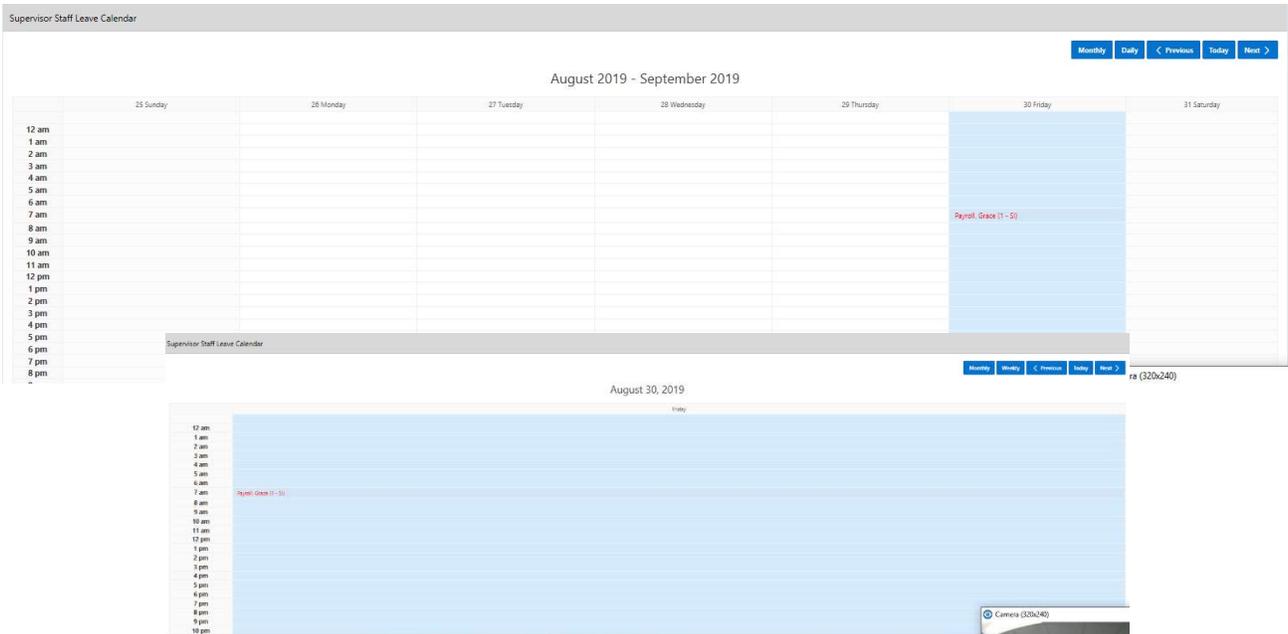
## Leave Calendar by Supervisor Staff

Will display leave requests based on the staff that a supervisor is assigned. If a request is red it means the request is going through the approval process. If a request is green that means the request has been completely approved or exported.

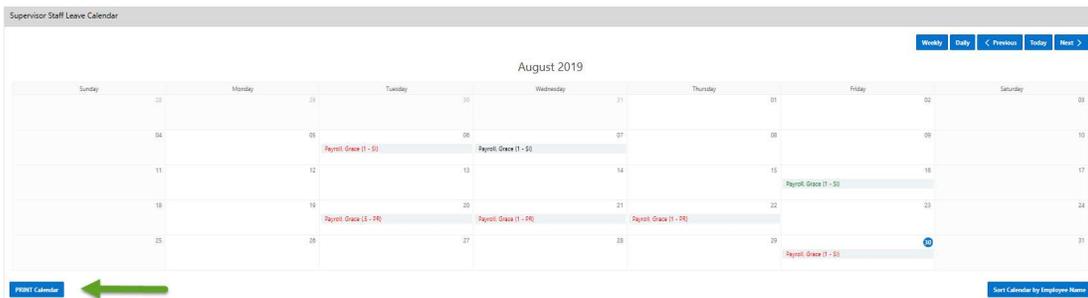
1. You can filter based on a specific work flow.
2. Select the work flow you want to view.
3. Click on the > arrow pointing to the right.
4. If you want to view a specific staff, select the staff person you want to view.
5. Click on the > arrow pointing to the right.
6. Click Apply Selected Employee(s) to filter.



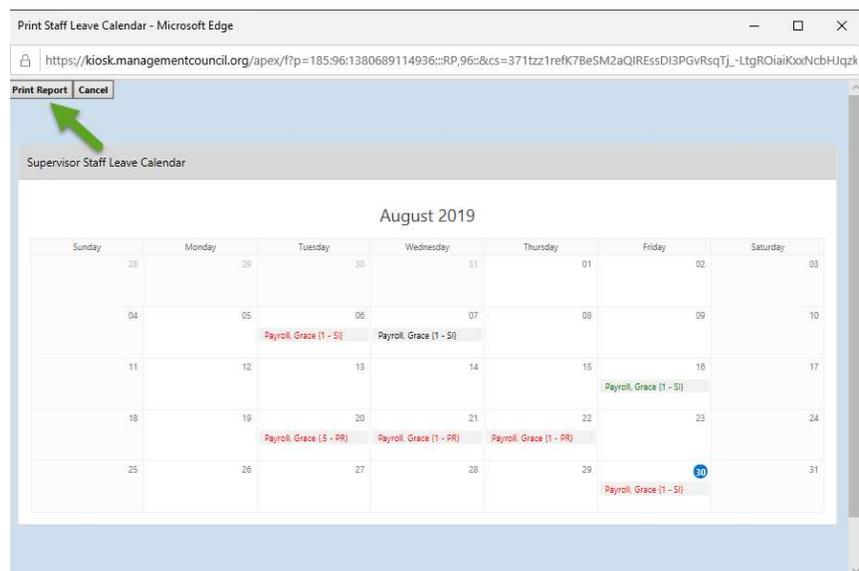
You also have the option to display the calendar by week or day.



If you want to print the calendar click on the Print Calendar button.



Then click Print Report.



## CHANGE PASSWORD

This feature will allow you to change your password once you are logged into Kiosk.

You must enter your old password and then type the new one twice before clicking on 'Change Password'.

Your password must be 8 characters in length.

Your district has the ability to configure that your password change in a certain number days. Your district may also require you to use at least one capital letter, number or special character when creating your password. They will let you know of those requirements.

Please enter old and new passwords.

Old/Temporary Password

New Password (must be at least 8 characters)

Re-Enter New Password

Cancel Change Password

## CORRESPONDENCE

This feature will allow you to send messages to the Kiosk Admin from within the Kiosk software.



When you click on Contact Kiosk Admin a message box will display for you to type a message that will be sent to the Kiosk Admin for your district. Click Send with done typing your message.

Compose Message

Subject

Message

Cancel Send

When you click on Correspondence you will see a list of the message you have sent.

Correspondence

Status  
Open

	Opened ↓	Subject	Status	Last Message
	09/03/2019 12:21:33PM	I think my sick balance is wrong	Pending	My last slip showed I have 20 days of sick leave but Kiosk shows 15 days available. Why is there a difference between the Kiosk and my pay slip?

1 - 1

To view the correspondence between you and the Kiosk Admin click on the magnifying glass. You will see a history of the correspondence and have the ability to send a new message.

Compose Message

Subject  
I think my sick balance is wrong

Message

Archive Correspondence Cancel Send

History

**Date** : 09/03/2019 12:21:33PM  
**From** : HSTEACH1@NCOCC.K12.OH.US

My last slip showed I have 20 days of sick leave but Kiosk shows 15 days available. Why is there a difference between the Kiosk and my pay slip?