



This job aid provides associates step-by-step instructions on how to request, correct and cancel time off in Workday. This does not include continuous or intermittent leave of absence.



NOTE:


- You can request time off from the Workday mobile app, however, the navigation steps will vary slightly.
- Workday will not allow requests or corrections to a closed pay period. Instead, a Payroll Adjustment Form will need to be submitted. Email PayrollDepartment@trustmarkins.com for the form.

A. Request Absence


1. From the home screen, in the Applications section, select **Absence**
2. Select **Request Absence** from the Request column
3. From the calendar, pick the days individually or if taking consecutive days off you can drag across the days to select them all at once
4. Click the **Request Absence** button at the bottom left of the screen to continue the process
5. In the **Type** box, click on  to select the time off you will be taking
6. Click **Next** to continue
7. On the next screen you will see an overview of your request. Review the information and make any adjustments or edits as needed:
 - The hours per day will default to your work schedule hours. Click the **Edit Quantity per Day** button to make adjustments if needed.
 - If you need to make changes to the dates, click into the date fields to select new dates
 - If you need to add an additional day for this same time off type, click the  button
8. Enter comments for your manager to read when they review this request, such as the reason for the absence
 - For Volunteer Time Off (VTO) the “Enter your Comments” section below your request is **required**
9. Click **Submit** to complete the request which will go to your manager for approval

B. Request Sent Back

If your request is sent back by your manager, please follow the below information

1. Navigate to your **Inbox** to access the tasks
2. Review any comments left by your manager by scrolling to the bottom of the task.
3. Adjust the request as needed
 - To remove a request, click the  button
 - To change the absence type requested, update the **Type** box
 - To adjust the hours, update the amount in the **Requested Time** box
 - Note: you cannot remove the entire request from the Inbox task, instead please follow the instructions in section D below.

C. Correct Absence (For **approved** requests only)

1. From the home screen, in the Applications section, select **Absence**
2. Select **Correct My Absence** from the Request column
3. From the calendar, click on the request that needs to be corrected
4. Make the necessary edits:
 - To remove the approved request, click the  button
 - To change the absence type requested, click on the Select box to choose the day(s) you need to update (or Select All at the top), then update the **Type** box
 - To adjust the hours, click on the Select box to choose the day(s) you need to update (or Select All at the top), then edit the amount in the **Quantity per Day** box
 - Enter a comment to explain the change to the previously approved request
 - Note: You cannot correct the date. Instead, remove the approved request and start the process again
5. Click **Submit** to complete the request which will go to your manager for approval

D. Cancel an Absence Request (For **unapproved** requests only)

1. From the home screen, in the Applications section, select **Absence**
2. Select **Correct My Absence** from the Request column
3. From the calendar, click on the request that you wish to remove
4. Click **Cancel this Request**
5. A summary will pop up for you to review
6. Optional: Enter a comment as to why you are cancelling this request
7. Click Submit to complete the cancelation of this unapproved request

E. View Accrual by Period

1. In the search bar, type in “Time Off Results by Period”
2. In the Time Off Plan box, select the time off plan you wish to see your balance for
3. In the Periods box, select the pay periods you want to check your balance for.
 - a. To see all periods in a year, click CTRL A once you have selected that year and hit enter. If you are looking at future periods please remember this is an estimate based on your scheduled weekly hours.
4. Click OK

F. Tips and Tricks

1. **Negative PTO** – You follow the same process as requesting regular PTO.
2. **Accrual Timing** – PTO accrual occurs on Wednesday of the pay week, once payroll is complete but is effective as of the last day of that pay period.
3. **Estimating Future PTO Accrual** –Any time you are within a current pay period, it’s no longer considered to be in the future so the system looks for the actual hours worked from a completed payroll in order to calculate the accrual versus your scheduled hours to estimate the future accrual. While payroll is being processed it’s not possible for Workday to use the actual hours worked so the accrual will show 0. This means that for 2 days during the pay week (Monday and Tuesday) you will have two periods that show a 0 accrual. Therefore, to better estimate your future accrual, you should add in your expected accrual for those one or two pay periods that display a 0 accrual.
4. **Floating Holiday Accrual** – A general calculation of your scheduled weekly hours divided by 5 is used. We understand that this won’t match everyone’s actual work day. Due to this we left the plan open to allow you to request more than you accrued so that it covers your full day. This might mean your balance will be negative for a bit and that is okay. HR will adjust it.
5. **Time Off Plan Lower Limit** – If you request time off for future dates and receive an error message, even though it appears you have enough PTO available, this is related to future time off requests which will bring you over the lower limit. If that happens, please adjust the future request to include unpaid time off so that you can process the earlier request.
6. **Work Schedule Limits** – For time off requests, you are not allowed to request **more** hours than you have on your Work Schedule for that day. For Floating Holiday, you are not allowed to request **less** hours than you have on your Work Schedule for that day. If your Work Schedule is incorrect, please adjust that and then process the request again. If this request is for a day in the past, your manager will need process it on your behalf.