Use of the Leave Module in My Interfisc Online (computer) for the employer

With this module you can manage the leave request of your employees: approve or decline the leave request.

The description below is for using the leave module on a PC, laptop or tablet. The use of the leave module in the "Unit4 Mobile HR app" is similar, but may differ slightly due to a simpler layout.

What can I do and where?

When you click on "Employee" ► "Out of office" on the left in the dark gray column, you are in the leave section of the portal. You could call this the home page of the leave. Here you can choose from the following 4 options:

- "Leave": Here you can manage (approve or decline) the outstanding leave requests per employee and view the employee's leave balance.
- "Out of office overview": In the overview you can see which leaves were requested for all employees in a certain month. This option is also accessible if you have approved or declined a leave request via "Leave".
- "Time-for-time": If your company offers the option to compensate for worked overtime with free time, this can be managed here.
- "Leave balance adjustments": Should an employee's leave balance be adjusted? Then you can do this here.

Leave: manage leave requests (approve or decline)

When an employee has submitted a leave request, you will receive a signal by e-mail. There are then several ways to approve or decline the leave request in the portal. Sometimes it is necessary to have an overview of all leave requests from all employees in order to ensure that leave requests are properly aligned with one another while there is sufficient staffing. Use "The way with more detail" just below in this description.

The quick way

1. Go to "My actions and signals". This can be done the quickest by clicking in the top right corner on the house icon.
2. This page shows the read and unread messages that you have received. Unread is green and read is blue. The number before it indicates how many actions are still open. Below you see the option "More details" in blue on the right-hand side. Click on this.
3. You will now see all the action signals to be approved. You can recognize the leave requests by the line:

   Approval action signal (Add Leave - <name employee>)
4. Move your mouse over the relevant line and wait until a white screen appears a little later with the dates of the leave request: when you have to assess the request at the latest, start and end date of leave, number of hours and days, the reason of the leave and any comments.
5. You can then immediately approve the leave by clicking on the thumb up button or reject (decline) it by clicking on the thumb down button. If you decline the leave request, a window with "Feedback" appears. Here you can write your reason for the decline. The employee will see

this text with the feedback of the assessment. The leave application has been processed with this. You can also indicate via the folder button whether you want to mark the request as "read" or as "unread".

The way with more detail

1. Go to "My actions and signals". This can be done the quickest by clicking in the top right corner on the house icon.
2. This page shows the read and unread messages that you have received. Unread is green and read is blue. The number before it indicates how many actions are still open. Below you see the option "More details" in blue on the right-hand side. Click on this. There may also be "Less detail", then the display is already correct.
3. You will now see all the action signals to be approved. You can recognize the leave requests by the line:

   Approval action signal (Add Leave - <name employee>)
4. Click on the line with the relevant leave request. In the next screen you will see the detailed information about the leave request, basically the same as with the quick method. If this information is not sufficient to assess the application, you can click on the option "More details" in the upper right corner. You will then also see the balance of the employee's leave hours. If this is sufficient information for the assessment, go to point 6. If not, go to point 5.
5. Click on "Out of office overview" in the gray column on the left (under "Out of office"). On the next page you see an overview of all employees in the current month. The month and year can be adjusted manually by clicking on the corresponding black arrows. This is a useful overview in connection with the occupation, to see who has the time off to coordinate leave requests. Dark green days are national holidays on which the employee is free by default (for example Christmas). Already approved leave requests are highlighted in light green. Leave requests that have not yet been approved are also light green and have a question mark (?) in the requested leave days. You can always view the leave, approved or not yet, by clicking on a light green day.
6. At the top right you can approve the leave by clicking on the thumb up button or reject (decline) it by clicking on the thumb down button. If you decline the leave request, a window with "Feedback" appears. Here you can write your reason for the decline. The employee will see this text with the feedback of the assessment. The leave application has been processed with this.

At different places it is possible to consult the leave card of an employee. This is possible by clicking on the light blue option “Leave card”. On this you will find a clear overview of the days already taken and the remaining balance of free hours. The out of office overview shows the taken leave chronologically: first the already taken leave is shown ("Leave" = past), then the future leave is shown ("Planned leave" = already approved but not yet enjoyed. The employee can enjoy this approved leave, but also decide to withdraw the leave). If the text "Not yet approved" in between brackets is noted after a leave period, then this is a leave request which still needs to be approved or declined by you.

Out of office overview

You were able to consult this overview when you approved or declined a request for leave. It is especially useful to get an overview of all granted and requested leave in a certain month. In this way you can coordinate the leave requests and take the occupancy into account. The leave days have different markings. Dark green days are national holidays on which the employee is free by default (for example Christmas). Already approved leave requests are highlighted in light green. Leave requests that have not yet been approved are also light green and have a question mark (?) in the requested leave days. You can always view the leave, approved or not yet, by clicking on a light green day. If you have opened the leave request that has not yet been approved (with a “?”), You can also approve or reject the leave request here by clicking on the thumb up button or reject (decline) it by clicking on the thumb down button. If you decline the leave request, a window with "Feedback" appears. Here you can write your reason for the decline. The employee will see this text with the feedback of the assessment. The leave application has been processed with this.

Time-for-time

If your company's leave arrangement allows you to compensate overtime for employees with leave (Time-for-time), this option will be available. Do you receive a request to grant time-for-time? Then proceed as follows:

1. Go to "Employee" ► "Out of office" ► "Time-for-time".
2. All employees are listed on the page that appears. Select the employee that you wish to view by clicking on the employee's name.
3. In the next screen you can book the overtime as leave (Time-for-time) by clicking on “+ New Time-for-time request”.
4. A screen appears where you can enter all the details of the overtime:
   - Date: Enter the date on which the overtime hours were created.
   - Type of leave: The type of leave you grant (Time-for-time).
   - Start and end time: The clock hours of the relevant overtime. Select the time indicated here with the mouse (this will turn blue). Overwrite with the correct time without using the ":". It is a 24-hour display and a number below 10 must be accompanied by a leading “0” (09:00).
   - Percentage: If this option has been arranged by us at your request, then you can indicate here whether these hours are reimbursed for more than 100%. Otherwise this field cannot be adjusted.
   - Comment: You can enter a comment here. The other fields cannot be filled.
5. Click on “Save and submit” to have the allocated time registered and processed on the leave card. If you only want to save the booking for a definitive booking later, click on "Save".

Please note: You cannot have overtime paid automatically via this leave module, as this module is not linked to our payroll administration. If you want to pay out the overtime (in part) to the employee, you must notify us of this by e-mail as a mutation. We will then process this on the next payslip.

With a "time-for-time" application there is always an applicant, usually the employee's manager. In addition, there are 1 or 2 approvers of the application. In a smaller company, these can be the same managers. Depending on how you asked us to set up this module, 1 or 2 managers must approve the application. If the applicant is also the approver, the same manager will receive a notification under "Actions and signals". By clicking on the lock icon (at the end of the line) you can open and approve the request. If the applicant and the approver(s) are different managers, then this icon will not be seen and the processing will take place as in the case of a leave request via signals at “My actions and signals”.

Leave balance adjustments

In a few simple steps you can adjust (decrease or increase) the leave balance of the employee. To do this, proceed as follows:

1. In the left (dark gray) column, select "Employee" ► "Out of office" ► "Adjust leave balance".
2. All employees are listed on the page that appears. Select the employee you wish to view by double clicking on the employee's name.
3. In the next screen you will see previous adjustments made to the leave balance of this employee. Click on "+ New leave balance adjustment".
4. A screen appears where you can enter all the details of the adjustment:
   - Type of leave: The type of leave for which you want to adjust the balance.
   - Date: Enter the date to which the adjustment relates.
   - The number of hours: Enter the relevant number of hours that you want to adjust. The entered hours are automatically converted into days.
   - Payout: Please do not check this box as this module is not linked to our payroll administration. You must notify us of the hours to be paid out by e-mail, as this is seen as a mutation.
   - Comment: Here you can write down any comments regarding the adjustment.

If your company requires two approvals for a "Time-for-time" booking, then a message will appear under "Actions and signals" based on the hours you have booked. By clicking on the lock icon (at the end of the line) you can open and approve the request.

Your out of office assistant: switch on or off and check replacement colleague

If you are absent for a longer period of time, you can have the leave requests managed by a replacement colleague or employee who also has access to the portal. It goes without saying that you discuss this with the colleague concerned before you appoint him or her as a replacement. Conversely, another colleague can also do this, for example by appointing you as a replacement. Setting up a replacement is always done via the "My roles overview" option. You can select this option on the left (dark gray column) by clicking on “Administration” ► “Users” ► “My roles overview”. You can also select this option on the "My Actions and Alerts" page (click on the company name in green in the top left corner or the house icon in the top right corner). At the very bottom you will see the "Replacement" block. At the bottom right of the block you can choose "My roles overview" (light blue). If this block is not visible with this option, first click on the icon with the map at the top of the page in the top right corner (this is next to the Play icon for the instructional videos). In the small screen that follows, you can check or uncheck the blocks that you want to see on this page. At "Replacement" the checkmark must be on.

When you are in "My roles overview", proceed as follows:

1. On this page ("My roles overview") you will also see two bold blue printed headings:
   - "Roles": this is you. Data is entered under the columns "Role", "Function" and "Unit". Under the column "Replacing Employee" or "Replacing External relation" the name of a colleague may be entered that can replace you in your absence. If nothing is stated here, then you have not designated a replacement. By standing on the line with your mouse (line turns light blue) and double-clicking on the line, you can see more details. In the new screen you can see your own data under the heading "Job position". Below that you will see "Replacement". Here you indicate whether your replacement is an "Employee" or an "External relation". Then select the company name and finally the name of the replacement. The difference

between an "Employee" and an "External relationship" is as follows: an employee is also on the Dutch payroll. An External relation is not (may be on payroll in your own country). PLEASE NOTE: you have not yet designated a replacement for your absence. Only the settings are now ready in the background.

- "Replacement roles": here are the colleagues who have designated you as their replacement in their absence. You cannot influence this yourself! A colleague designates you as a replacement and of course communicates this with you. You can view more information by standing on the line with your mouse (line turns light blue) and double-clicking on the line. Is this heading not indicated on the page? Then you have not been appointed by a colleague as his/her replacement.

2. To actually activate someone as your replacement, go to the "My Actions and Signals" page by clicking on the green name of the company in the upper left-hand corner or the house icon in the top right corner. At the very bottom you will see the "Replacement" block. Here you can actually see the settings as entered above. You see for whom you may be the replacement and you see who may be able to replace you. You will also see in light blue that your status is “Available”. You definitively activate a replacement by clicking on "Available". In the new window, click on "Not available". Your status changes to "Not available" and turns red. As a result, all requests that have already been made by employees, but have not yet been assessed, will be redirected to the replacement. All requests made after this moment will also be submitted to the replacement. You change your status in the same way after the absence: click on the status "Not available" shown in red and click on "Available" in the new window. You will see the status change to “Available” in the light blue color.