

## Quickbooks Time Leave Approval Process

### Part I – Leave Codes

The following codes are setup in QB Time:

FT PTO (1-4 yrs)	FT PTO (5–9 yrs)	FT PTO (10+ yrs)
PT PTO (1-4 yrs)	PT PTO (5–9 yrs)	PT PTO (10+ yrs)
Holiday	Bereavement Leave	Jury Duty
Parental Leave	Personal Leave	Military Leave
Voting Leave	Extended Illness	Emergency Closings
Short-term Disability	Long-term Disability	Additional PTO

#### PTO –

- Paid time off begins accruing immediately upon beginning employment.
- Paid time off must be scheduled in advance and pre-approved by your Supervisor unless it is due to an unforeseen and unavoidable need.
- Employees may not take more than ten (10) days at any one period.
- New employees must successfully complete 90 days of employment prior to using any paid time off.
- After 1 year of service an employee may take a maximum of 20 hours of paid time off that has not officially accrued.

#### Holidays –

- The USHJA will grant paid holiday time off to full-time and part-time employees based on the schedule of Holidays published.
- Holiday pay will be calculated based on your straight-time pay rate (as of the date of the holiday) times 7.5 hours for full-time employees and 3.75 hours for part-time employees.

#### Bereavement –

- Approved by your Supervisor and/or Executive Director.
- Up to three (3) days of paid bereavement leave will be provided to full-time and part-time employees.
- For purposes of bereavement, and other types of leave, one day is considered 7.5 hours for full-time employees and 3.75 hours for part-time employees.

#### Jury Duty -

- Approved by your Supervisor.
- Full-time and part-time employees may request up to 2 weeks of paid jury duty leave over any one-year period.
- Jury duty pay is calculated on your base pay rate times the number of hours you would otherwise have worked on the day of absence.

#### Parental Leave –

- Approved by your Supervisor.

- Employees are eligible for Parental Leave after one year of continuous employment. Parental leave may not exceed 1 week
- The company will provide 1 week (5 days) of pay at the employee's regular rate of pay, minus required and applicable withholdings.

#### Personal Leave –

- Requests for personal leave are evaluated on an individual basis by the Executive Director.
- The USHJA may approve a leave of absence without pay to full-time employees who have been employed for three (3) years who wish to take time off from work duties to fulfill pressing or unusual personal obligations.
- The maximum length of personal leave is 30 days.

#### Voting Leave -

- If your work schedule makes this impractical, you may be granted unpaid time off with approval from your supervisor.

#### Extended Illness -

- No more than 5 days may be banked in any fiscal year.
- The maximum amount of banked time is 30 days.
- Approved by Supervisor.
- Catastrophic or other special circumstance approved by the Executive Director.

#### Emergency Closings –

- When operations are officially closed due to emergency circumstances: Time-off from scheduled work will be paid. For example, if the USHJA delays a start time by one-hour, nonexempt employees will be paid for the one-hour delayed start. If the USHJA closes the offices at 3:00 p.m., nonexempt employees will be paid for the two hours.
- Employees out on scheduled vacation, out sick or on FMLA, disability or worker's compensation, are not eligible for weather related pay. Part-time employees working less than 20 hours per week, temporary employees, and interns are not eligible for weather related pay. Employees working remotely or working events are also not eligible for weather related pay.

#### Short-Term & Long-Term Disability -

- The USHJA provides a Short-term Disability (STD) and Long-term Disability (LTD) benefits plan to full-time employees who are unable to work because of a qualifying disability due to an injury or illness.
- Only record in TSheets when approved for disability.

#### Additional PTO ("Addtl PTO")–

- The USHJA recognizes that exempt personnel may be required to travel or work at an event over a weekend as part of their official duties.
- Non-exempt positions are not eligible for additional PTO time.
- If you are eligible for additional PTO time, and are required to work at an event, competition or USHJA function over a weekend (Saturday and Sunday) or holiday, you will be granted one (1) hour off per hour worked in additional PTO time for every Saturday, Sunday or holiday worked.

- Half hours worked or anything greater than a half hour up to a full hour will earn a full hour additional PTO. Any time worked below a half hour will not earn additional PTO.
- Use of additional PTO before earned must be approved by your Supervisor.
- At calendar year end, additional PTO will be combined with your full-time / or part-time PTO, and will be rolled forward accordingly. i.e. no more than 40 hours will be rolled forward for full-time PTO, including both the FT PTO code and additional PTO.

## **Part II – System for Leave Requests**

**Holiday Leave** – Finance Department staff will enter Holiday Leave from the approved Holiday schedule that is distributed each calendar year.

### **All Other Leave Codes Require Pre-Approval or Approval at Timesheet Submission**

#### **Submitting a Leave Request**

When a Staff member is ready to request time off for one of the leave codes listed in Part I, they will log in to Quickbooks Time (formerly TSheets), and:

##### **Online > Go to Time Off (in left Menu) > Add Time Off.**

1. Choose a code, date of entry, and number of hours on that day.
2. (optional) Add another day for the same code.
3. (optional) Add notes.
4. Send **Request**.

##### **Time App > Go to Time Off (in left Menu) > Add Time Off.**

1. Open app.
2. At the bottom right hand corner, tap the ... More menu.
3. Choose Time Off from that menu.
4. Tap the + in the upper right hand corner.
5. Choose a code, date of entry, and number of hours on that day.
6. (optional) Add another day for the same code.
7. (optional) Add notes.
8. Send **Request**.

Once the request has been sent, the staff member's designated approver (usually, either their Supervisor and/ or the Executive Director) will receive notification that they have pending time off requests from the staff member via email.

In the Time Off screen, staff members will see a list of their time off entries. If approvals are required, the status of requests will display: pending, approved, denied, or canceled. A staff member can check back here to check the status of time off requests.

#### **Reviewing and Approving a Leave Request**

When a Supervisor is ready to review requested time off for one of the leave codes listed in Part I, they will login to Quickbooks Time (formerly TSheets), and:

### **To Approve or Deny Time Off**

1. Go to Time Off (in left Menu)
2. Filter the screen the way that best suits you, by employee, by pending approved, or denied status.
3. For a pending request, do one of the following:
  - a. Select the request, add a note, and select Approve or Deny
  - b. Hover over the request and select Approve or Deny

### **To Edit Time off:**

- A denied request cannot be edited.
  - A pending request cannot be edited.
  - Edits can be made to a time off request after it has been approved.
  - Once a timesheet is locked by export or timesheet approvals, it cannot be edited.
1. Go to **Time Off** and select a time off entry.
  2. Select **Edit** and make your changes.
  3. Select **Save**.

Currently, QB Time does not allow the approval or denial of time off requests on their mobile app.

### **Additional PTO ("Addtl PTO") Leave Request**

QB Time's sole purpose for USHJA is to provide, as accurately as possible, the staff time allocations, for each USHJA program. As such, additional PTO time earned in QB Time, would lessen the accuracy of these allocations. In turn, a different system has been created for additional PTO.

When qualifying additional PTO is earned:

### **Submitting Earned Additional PTO Time**

1. Create an email with the subject line "Addtl PTO Earned".
2. Address email to Approver / Supervisor and carbon copy Georgia Holbrook.
3. Please list the date, the event where the additional PTO time was earned, and how many hours were earned.
4. Send email.

### **Approve or Deny Earned Additional PTO Time**

1. Review the emailed request for accuracy by comparing to hours worked in QB Time.
2. Reply All to the submitted email.
3. State whether the Additional PTO time is approved or denied.

The Finance Department will keep a record of the approved or denied earned Additional PTO time.

### **Submitting Use of Additional PTO Time**

1. Please find the approved earned time off email.
2. Select Forward to forward the approved email.
3. Change Subject line to "Addtl PTO Time Use"

4. Address email to Approver / Supervisor and carbon copy Georgia Holbrook.
5. Send Email.
6. At the same time, enter the time requested under the Addtl PTO Time code in the Time Off menu (as detailed in the Submitting a Leave Request instructions above), and send request.

**Approve or Deny Use of Additional PTO Time**

1. Review the emailed request for accuracy.
2. Reply All to the submitted email.
3. State whether the additional PTO time usage is approved or denied.
4. Approve or deny the request in the Time Off menu of QB Time online (as detailed in the Reviewing and Approving a Leave Request instructions above).

The Finance Department will keep a record of the approved or denied usage of additional PTO time.