alight worklife
LeavePro

LeavePro NXT Self-Service Employer User Guide

Version: 5.1

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TOC

Introduction

This document provides a high-level overview of how to navigate through the LeavePro Employee Self-Service Portal, with screen-by-screen instructions—from logging in to completing specific actions within Self-Service.

LeavePro Self-Service offers a wide range of functions. To jump to a specific function, click on its name in Contents.

LeavePro Self-Service is compatible with the following Web browsers:

- **For Windows 10 or higher**
    - Microsoft Edge 88 or higher
    - Firefox 61 or higher
    - Chrome 67 or higher
- **For Mac OS 10.9 or higher**
    - Safari 11.1
    - Firefox 61 or higher
    - Chrome 67 or higher

Employee Self-Service Capabilities

With the Employee Self-Service Portal, you can manage your own leaves:

- Initiate a new leave for yourself.
- Receive text and/or email alerts and notifications to initiate tasks, like confirming actual return-to-work dates.
- Securely upload documents via computer or mobile device.

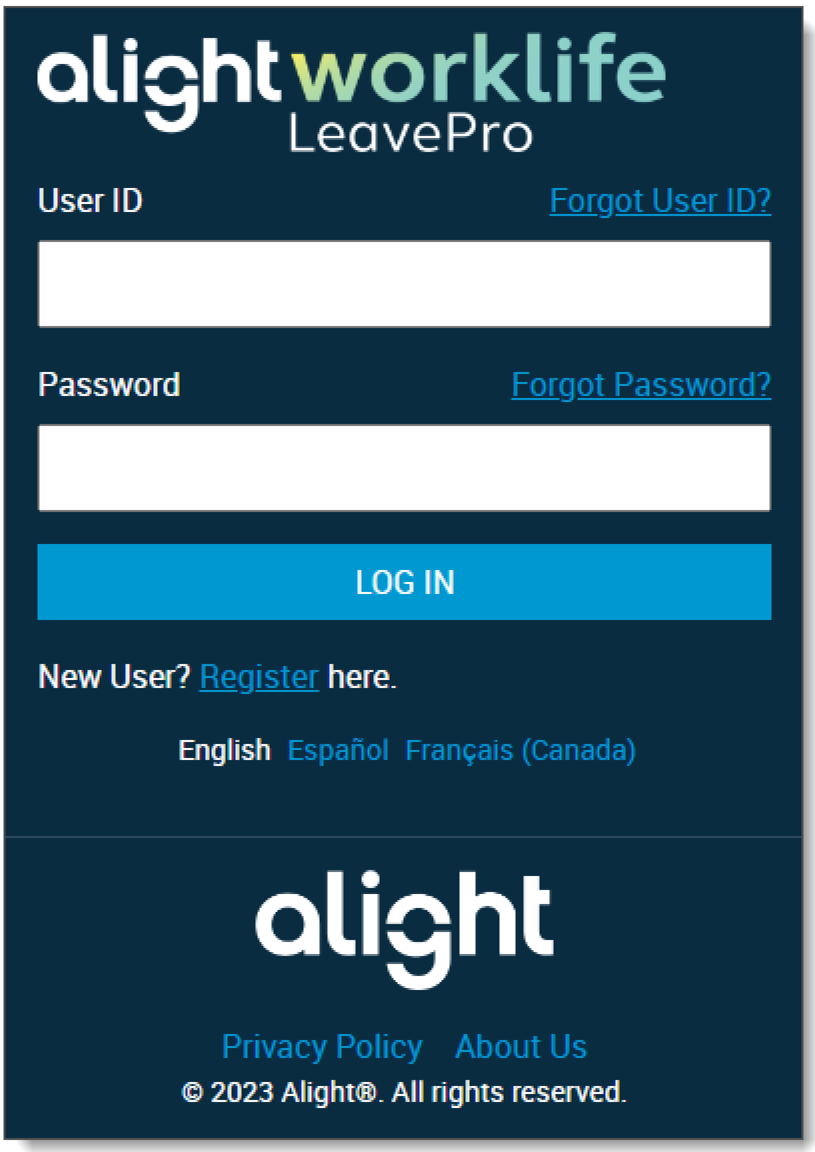
New User Registration

A new user needs to establish account credentials their first time to the Self-Service site.

Note: If you have account credentials from the previous Self-Service site and attempt to use them to log in to the new site, you will be automatically redirected to the Account Registration page.

To register:

1. On the **Log In** screen, click **Register**.



2. Enter your **Work Email** or **Mobile Phone** number, click **Next**.

Note: If you enter your mobile phone number and there is not one on file, an error message will appear. The information you enter must match the data that is provided by your employer.

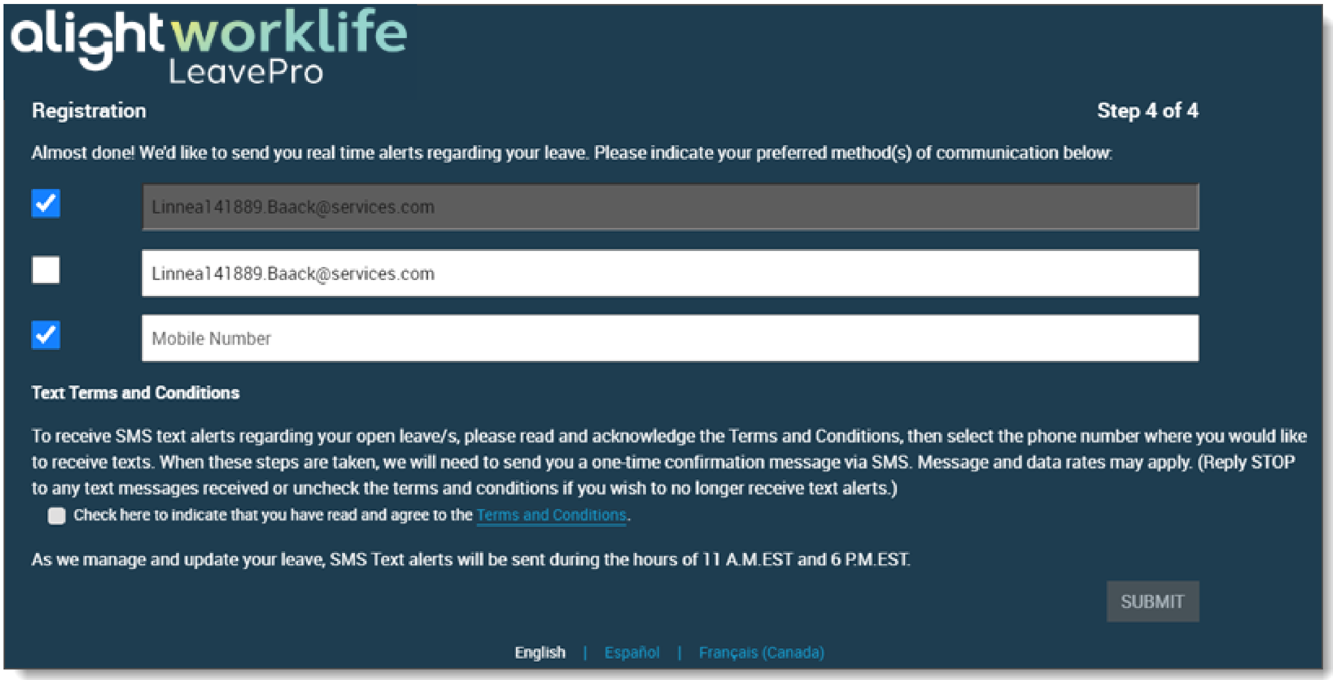
3. Enter the code (sent to your work Email or Mobile Phone), and click **Next**.

4. Enter a User ID, enter a Password, and Confirm Password. Click **Next**.

   If any of the registration fields are not completed, an error message will appear. the question marks give a user information to successfully register, and the exclamation point highlights when the passwords do not match.

Note: You can reuse your User ID and Password form the legacy Self-Service site on the new portal, however, password requirements have changed. Passwords must be at least 10 characters long and contain at least one uppercase letter, one lowercase letter, and one number.

5. Select communication preferences. Choose **Work Email** (default), **Personal Email**, **Mobile Phone**–or all three–to keep you informed about your leaves.



6. If you would like to receive SMS text alerts regarding your open leave, read the terms and conditions and the select the check box to opt in to text messages.

> **Note:** Text messages will only be sent during the hours of 11 A.M. EST to 6 P.M. EST.

7. After entering the information for your preference, click **Submit**.
8. Once the registration process is complete, you'll be redirected to the main log in page to begin the log in process.

> **Note:** Work Email will always be auto populated and selected as default (if available). If a work email is not available, the field will not show as an option. You can deselect Work Email as a preference.

Logging Into LeavePro

New LeavePro users will need to register their account before they will be able to log into the system. See the previous section for more information on registering a new user.

Log in Type

There are two log in processes for LeavePro based on the security options your organization has chosen:

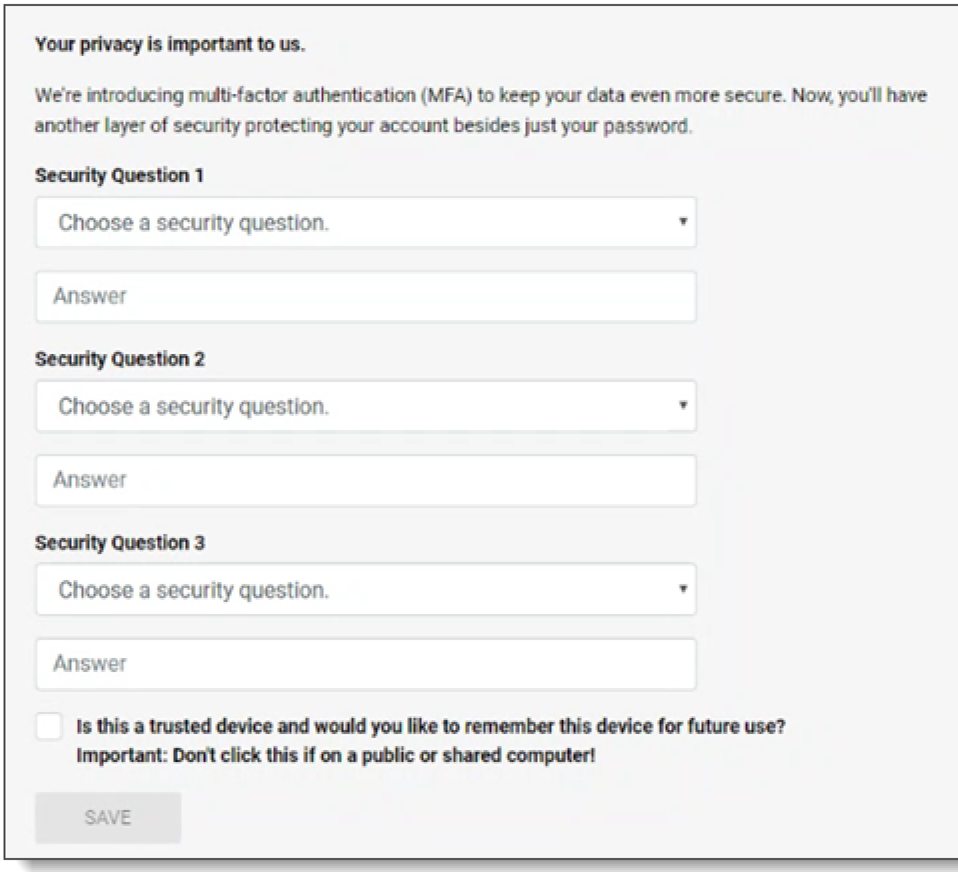
- **Multi-factor authentication**
- **Single sign-on (SSO) authentication**

Multi-Factor Authentication

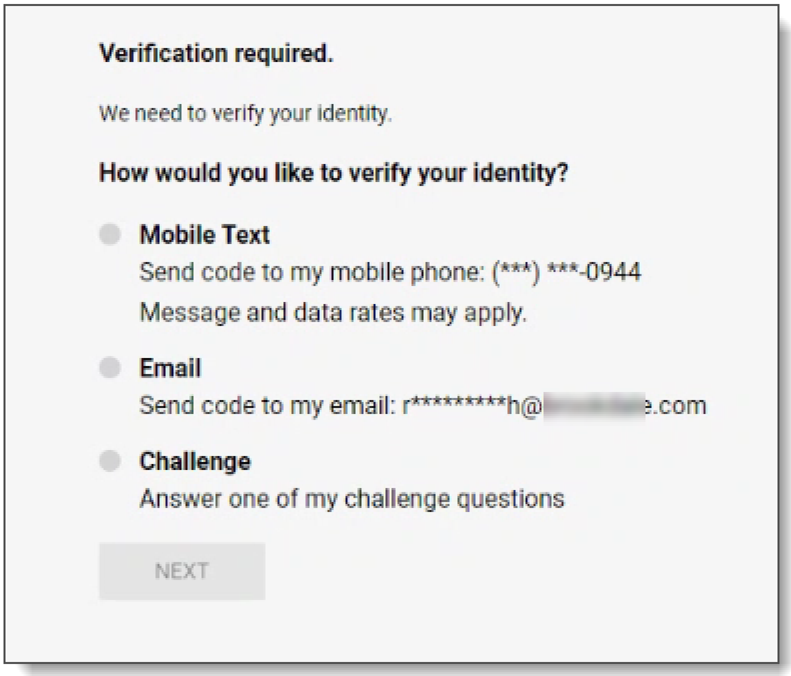
Multi-Factor Authentication requires you to provide two different factors to the authenticator before being allowed access. The first factor is your standard credentials, Username and password. The second factor is a code that the system will automatically send to your established cell phone or email address. Your organization can also choose to enable challenge question authorization where you will be asked a pre-configured question to be granted access.

MFA Challenge Questions

You will prompted to enter three security challenge questions. When verifying your login you will be asked a random question from this list.



During Log in, after providing your username and password, you will be prompted to choose the secondary factor you will provide.



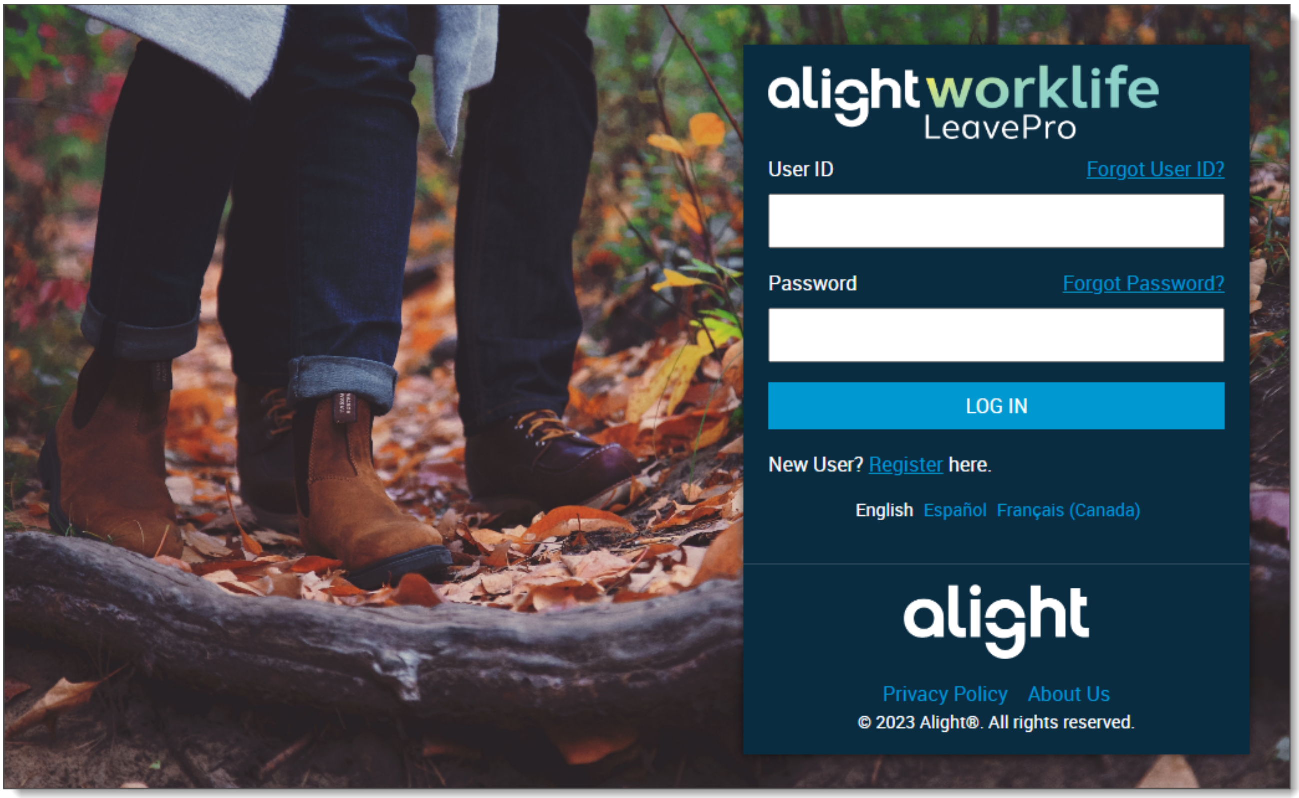
Single Source Log in

Single sign-on (SSO) allows you to log in to LeavePro with a single ID and Password, with no further authentication steps.

To log in:

1. Enter your **User ID**.
2. Enter your **Password**.

3. Click **Log In**.

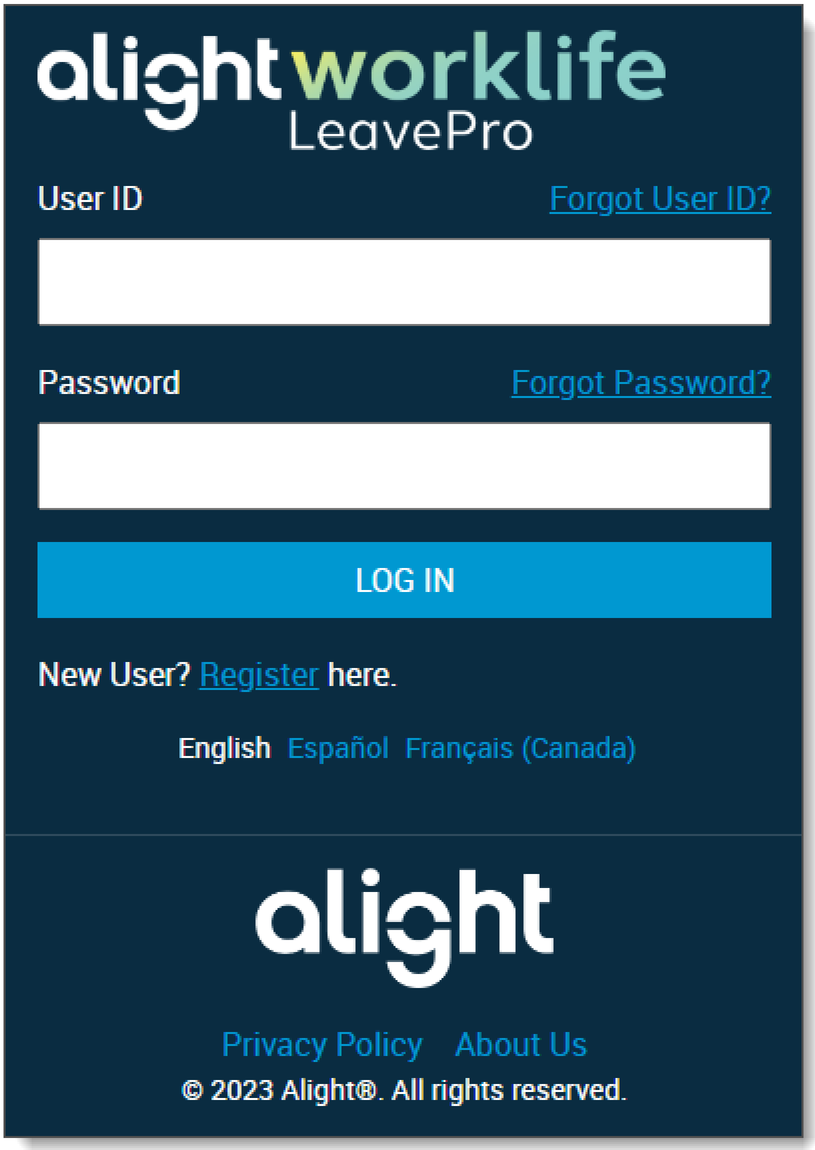


Account Recovery

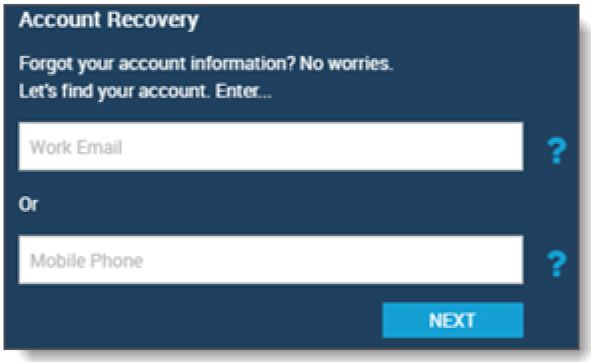
If you happen to forget your sign on credentials, you can reset them by using the account recovery option.

If you forget your User ID or Password:

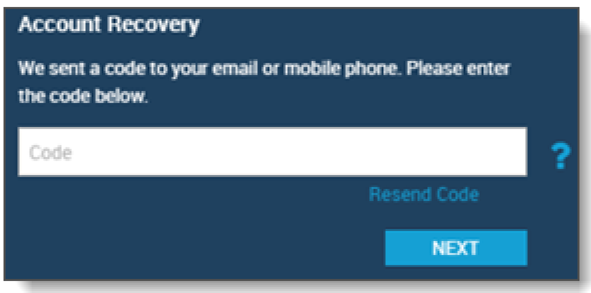
1. Click **Forgot User ID** or **Forgot Password** on the Log In screen.



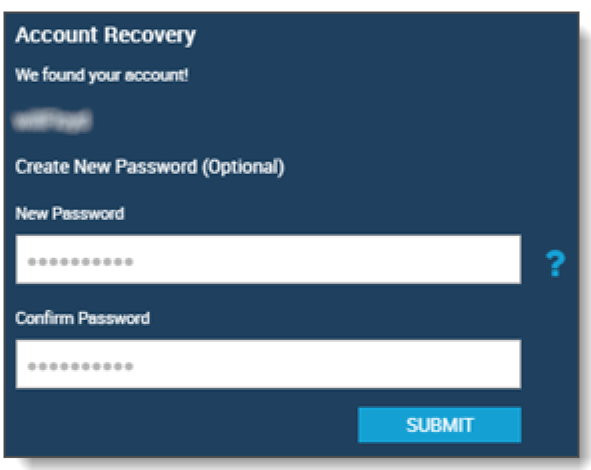
2. Enter your Work Email or your Mobile Phone number. The information you enter must be the same data provided by your employer.



3. Click Next. A code will be sent to your Work Email or Mobile Phone.
4. Enter the code, and click Next.

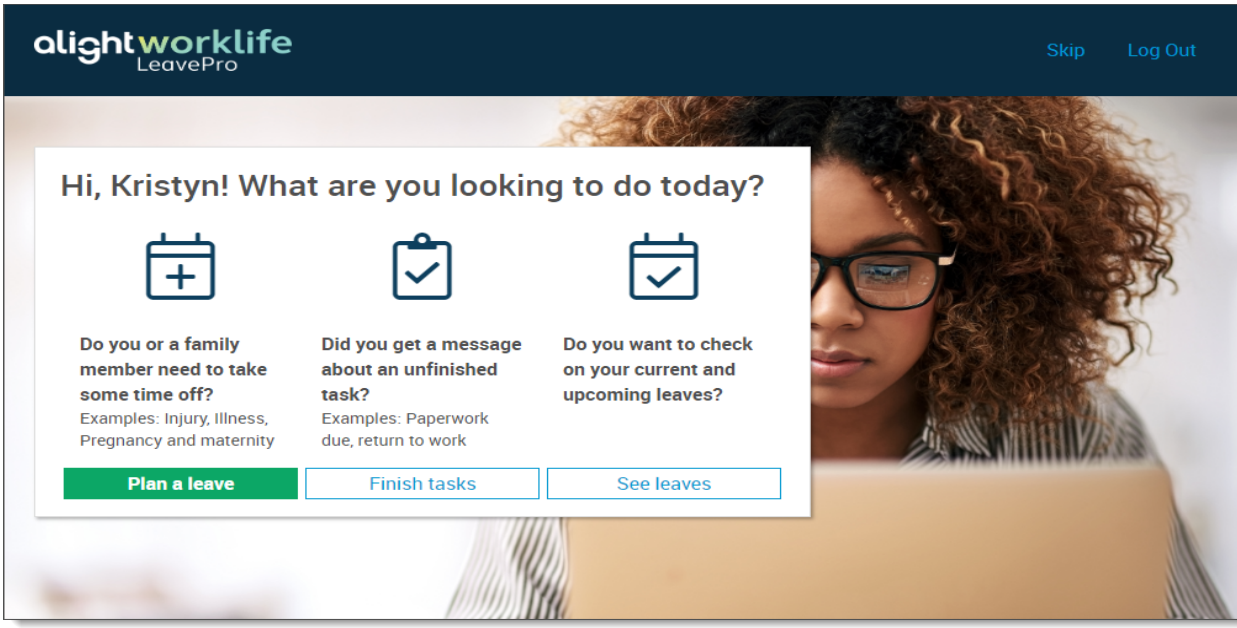


5. The Account Recovery screen will remind you of your username. If you forgot only your username. click Submit to continue to the My Leaves main landing page. If you forgot your password, type a New Password, Confirm Password, and click Submit.



LeavePro Self-Service Director Page

After logging into LeavePro Self-Service, you will see the Director Page.



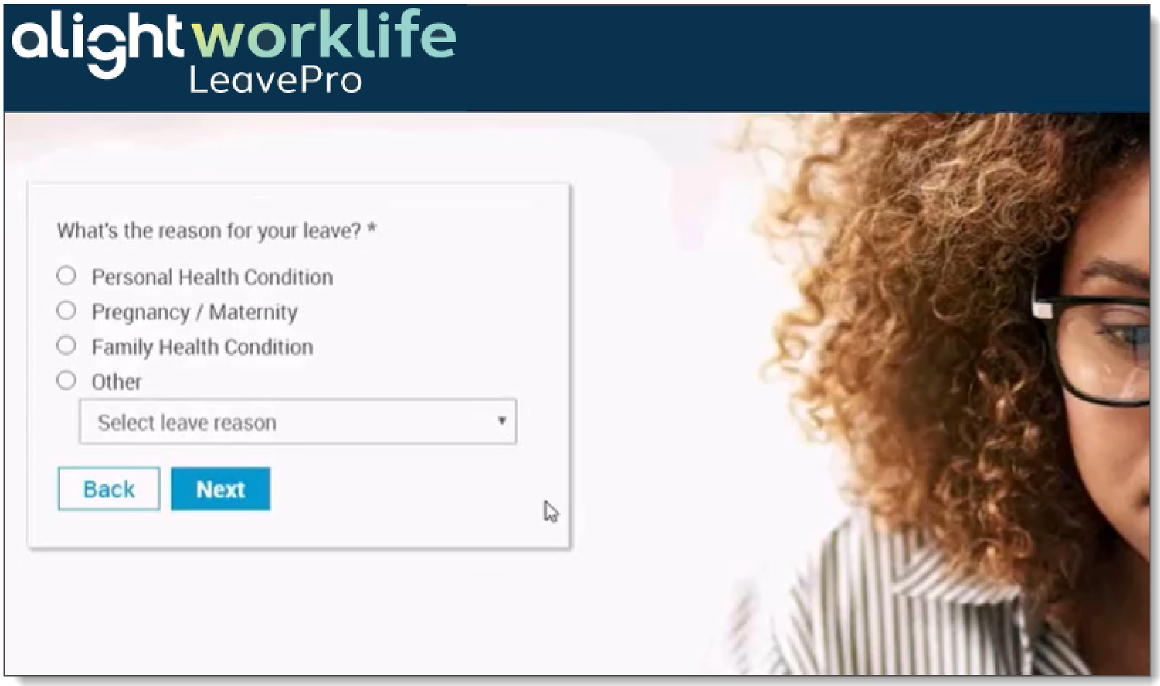
This page will guide you to some of the most important areas of LeavePro, including:

- Planning a Leave
- Finishing tasks
- Viewing an existing Leave

Note: You can bypass the LeavePro Self-Service Director Page by clicking **Skip to LeavePro Home** in the upper right corner.

Plan a Leave

To begin the process of planning a new Leave, click **Plan a Leave** from the Director Page.



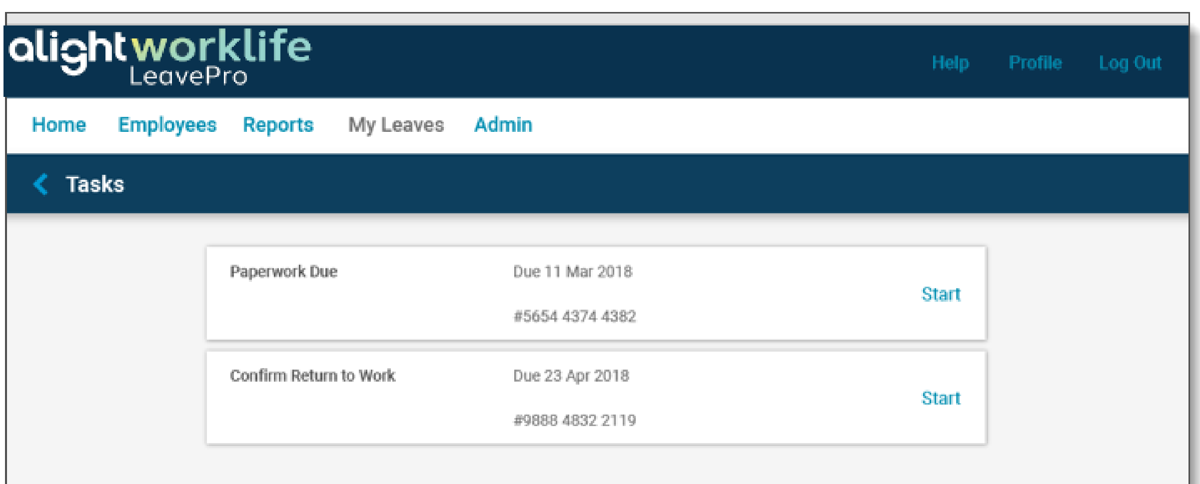
The **Plan a Leave** wizard will start, select your leave reason and click **Next** to start your Leave request.

This will take you to the **Plan a Leave** wizard on the **My Leaves** page. For further information, see Plan a Leave.

You may also click **Back** to return to the main Director Page.

Finish Tasks

If you have tasks that need to be finished you can view them by clicking **Finish Tasks**. This will display a list of any tasks you need to complete:

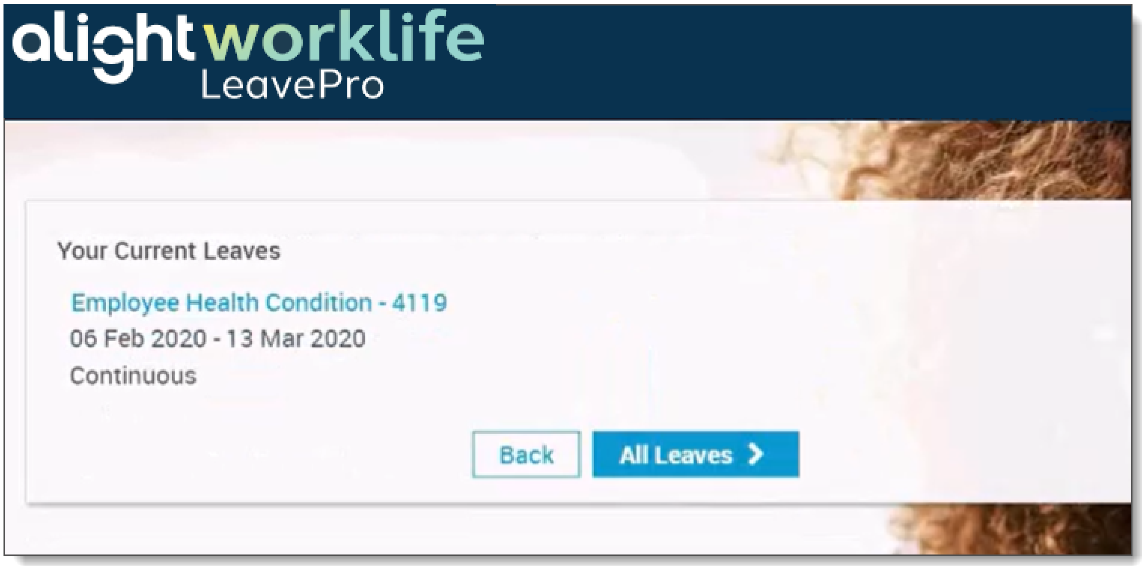


Click **Start** next to the task that you want to complete, and you will be directed to the appropriate task

For more information on completing tasks, see the Tasks section of the My Leaves Page.

See Leaves

If you already have existing leaves, you can view them by clicking **See Leaves**. This will display a list of all of your current leaves:



You can click on a leave from the list to navigate to the **My Leaves** page for that specific leave. Or you can click **All Leaves** to display a list of all of your open and completed Leaves.

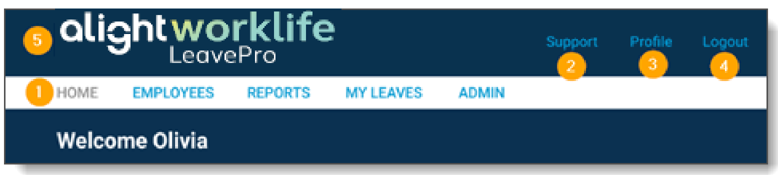
For more information on viewing your leaves, see My Leaves Page.

You may also click **Back** to return to the main Director Page.

Self-Service Portal Header

From the **Self-Service Portal's Header**, you can:

- Navigate to each of the main landing pages.
- Find support contact information.
- Update your profile.
- Log out of the portal.
- Go back to the Home page from any screen.



LeavePro Icon

Click the **LeavePro Icon** in the header at any time to return to the Home page.

Support

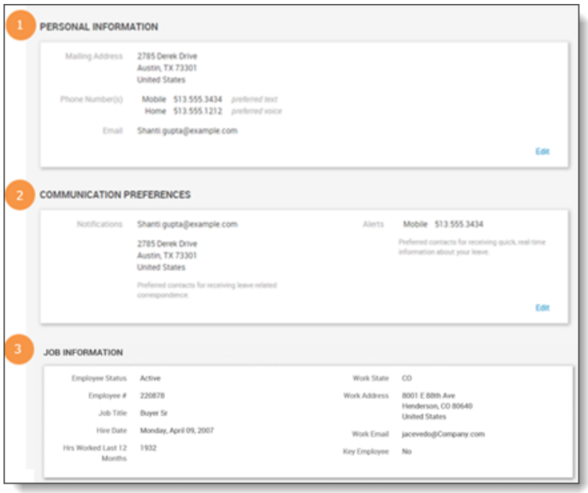
Click **Support** to see a Call Center phone number to call for assistance.

Profile

Click **Profile** to view or edit your:

- Personal Information
- Communication Preferences (for Notifications and Alerts)

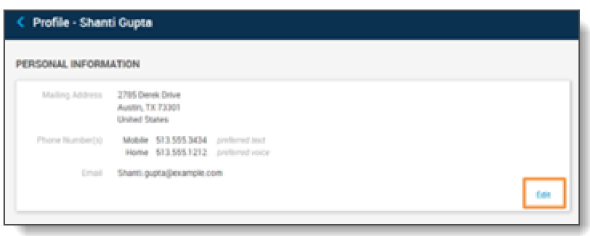
- Job Information (view only)



Personal Information

To review or edit your personal information:

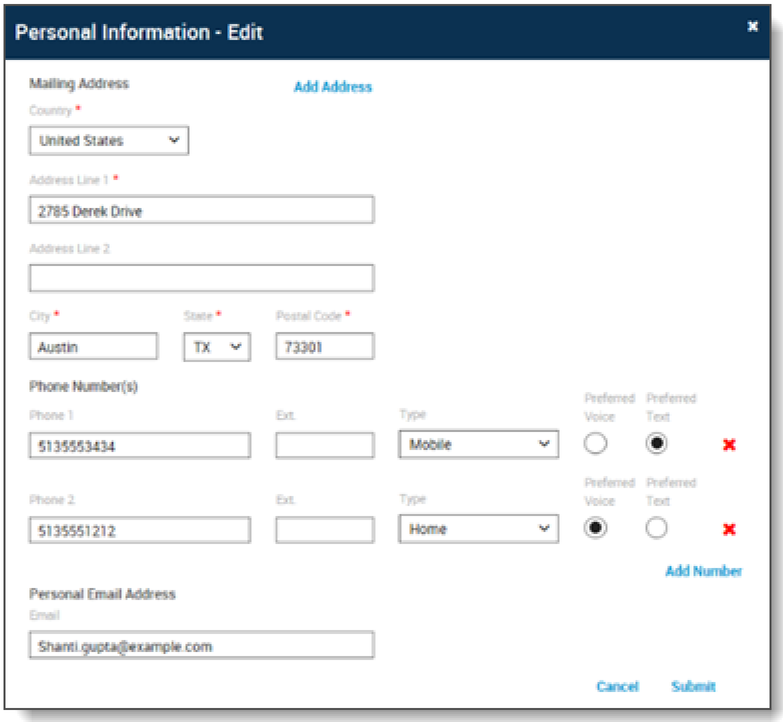
1. Click **Edit** in the Personal Information section on the Profile page.



2. In the **Personal Information - Edit** pop-up box, you can edit:

    - Mailing Address
    - Phone Number(s)
    - Preferred Voice or Preferred Text selection

- Email Address



3. Click **Submit** when finished.

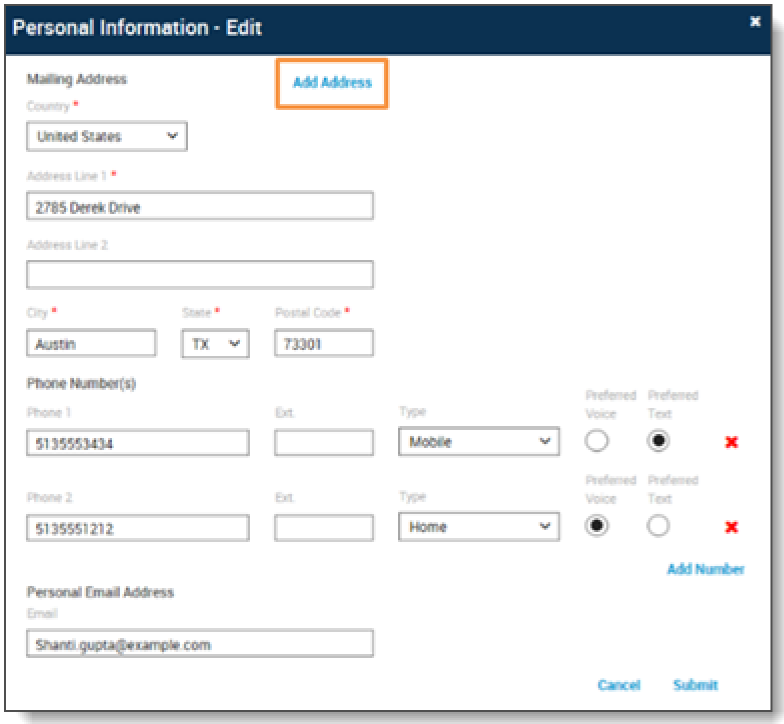
Note: You can add up to four different types of phone numbers, along with their extensions.

Alternate Mailing Address

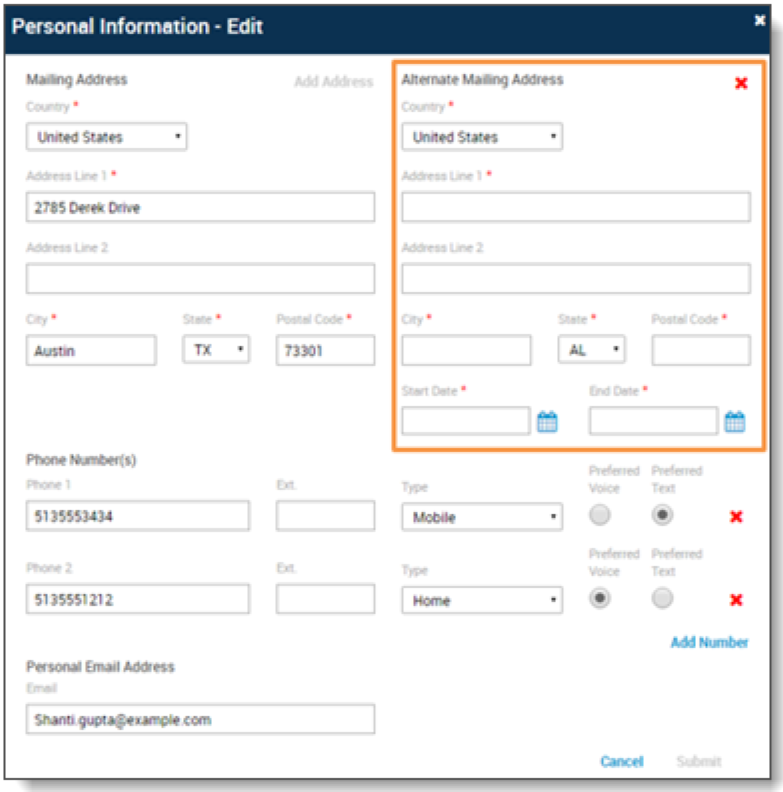
You can add an alternate, short-term mailing address to the Personal Information in your profile. For Example, you might use an alternate mailing address while caring for a loved one who lives in a different state.

To add an alternate mailing address:

1. Click **Add Address** in the Personal Information - Edit window.



2. Add the mailing address where you would like to receive mail associated with your leave.

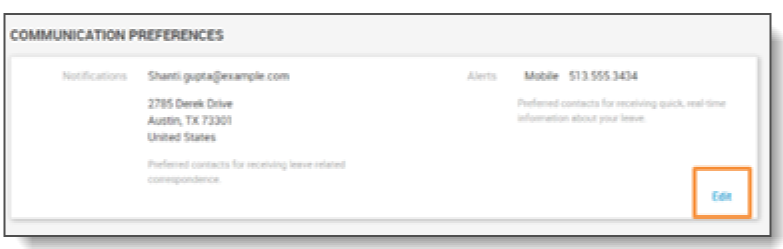


3. Include a **Start Date** and **End Date** (required).
4. Click **Submit** when finished.

Communication Preferences

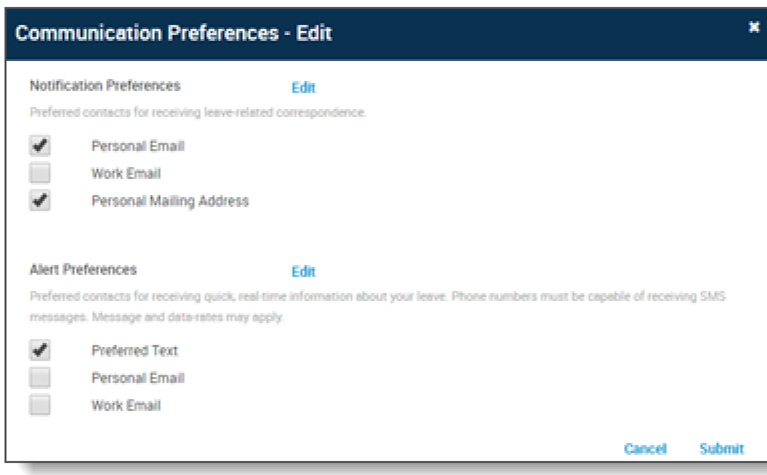
You can select Communication Preferences to receive notifications and alerts.

1. Click **Edit** in the Communication Preferences section on the Profile page.

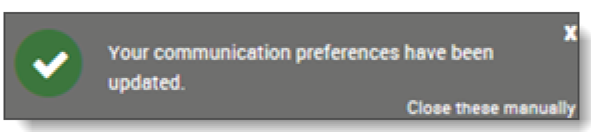


2. In the **Communication Preferences - Edit** pop-up box:

- For **Notification Preferences**, select:
    - Personal Email
    - Work Email
    - Personal Mailing Address
- For **Alert Preferences**, select:
    - Preferred Text
    - Personal Email
    - Work Email



3. Click **Submit.** A confirmation message will appear.



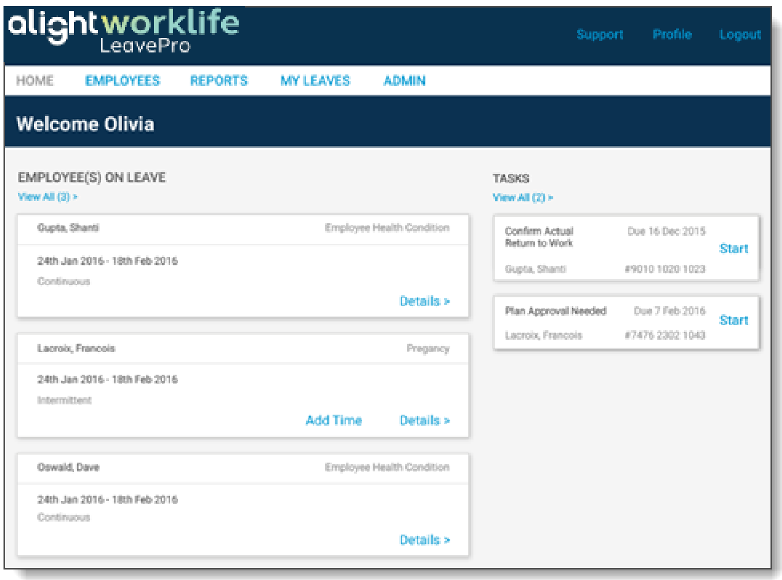
Logout

Click **Logout** when you are finished with your session and want to exit Self-Service.

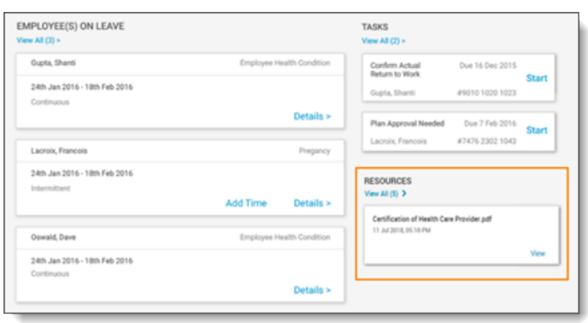
Home Page

The **Home** page provides a complete list of all employees currently on leave. This includes Intermittent, Continuous, and/or Reduced Schedule Leaves. It also shows **Tasks** associated with current leaves.

- **Current Leaves** - The Home page only shows those employees who are currently on a leave.
- **Details** - To view details for a specific employee leave, click **Details** in the relevant employee card.
- **Add Time** - To enter Intermittent time off for an employee, click **Add Time** within the relevant employee card.
- **Tasks** - Click **Start** to begin a task for a specific employee.

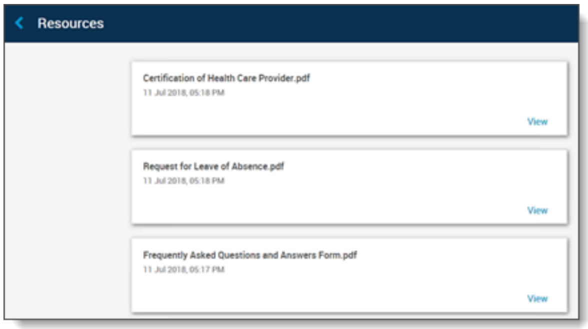


If configured by your employer, the Home page might also show a **Resources** section.



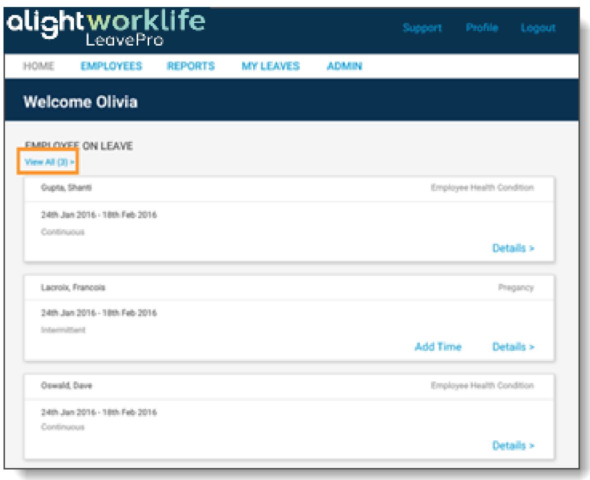
In Resources, you can view client documents (for example, client plan forms, plan policies, and leave forms).

To view the Resources page, click **View**. The Resources page displays the full document list. To view a specific document, click **View** for the document you would like to see.



View All

The Home page displays up to three employee cards. Click **View All** to see all employees on leave.



Employee Leave Details Page

When you click **Details** for a leave, you are taken to the employee's **Leave Details** page. On this page, you can:

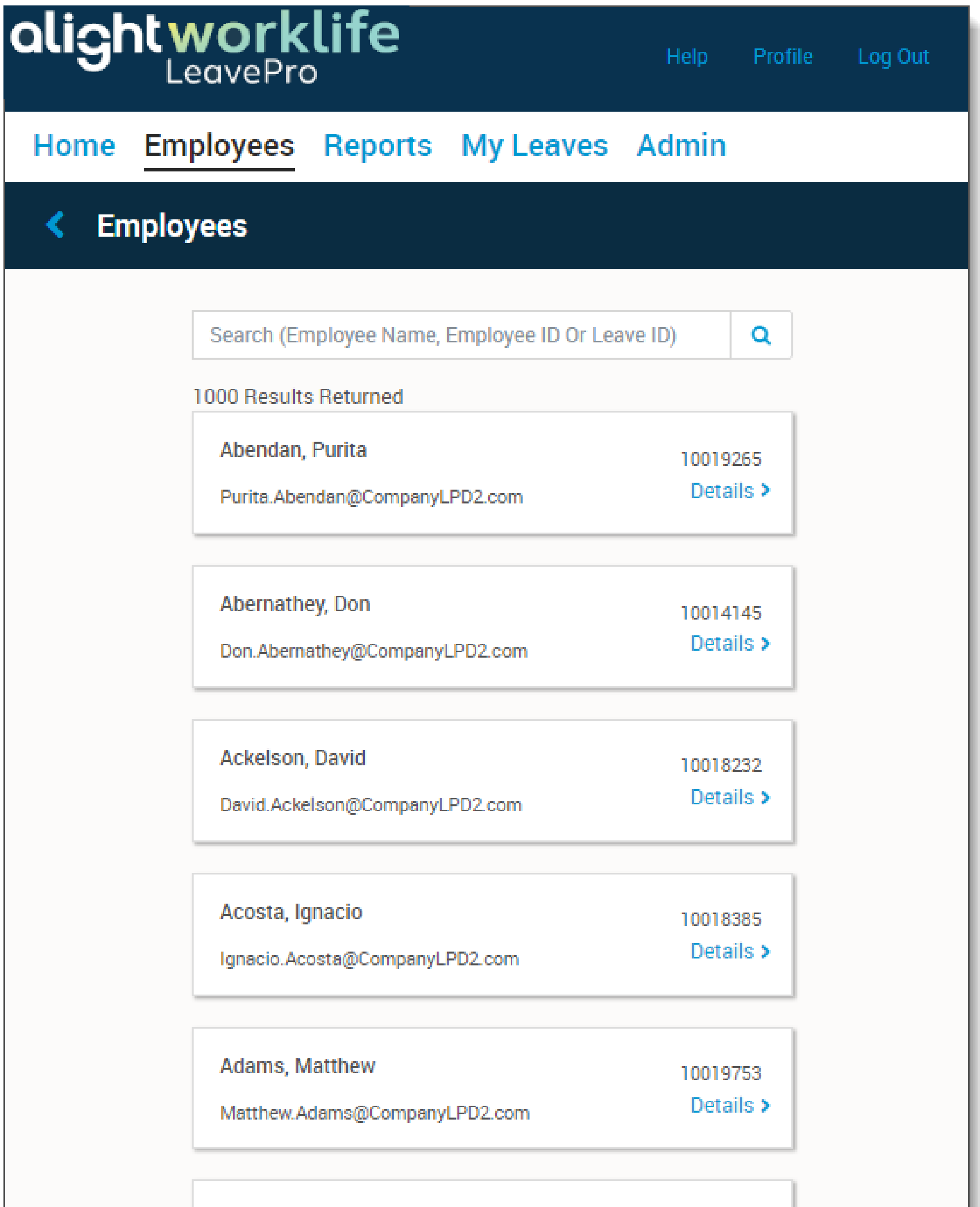
- Plan a leave for the employee.
- Change the leave start and/or leave end date for the employee.
- Review details for a current or completed leave for the employee.
- Add intermittent time off to a current leave for the employee.
- View the Coverage Timeline for a selected leave for the employee.
- View and initiate tasks (**Confirm Expected Return to Work** or **Paperwork Due**).

- View documents associated with the employee's leave.
- Print leave details.

Employees Tab

The **Employees** tab allows you to view information for all of your direct reports whether or not those employees have a current leave.

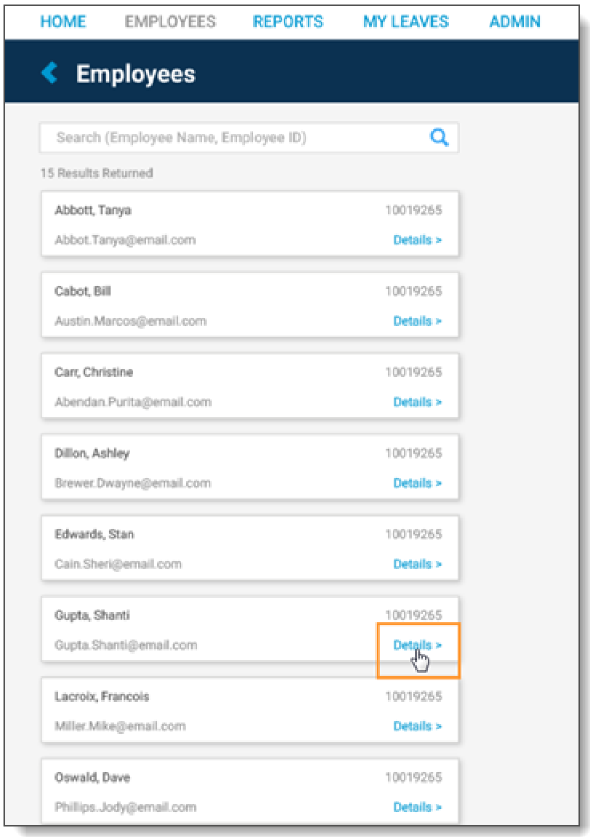
- The **Search** feature allows you to easily locate an employee by typing their name, client-specific ID number, or by Leave ID.
- To view information for a specific leave, click **Details** in the relevant employee card.



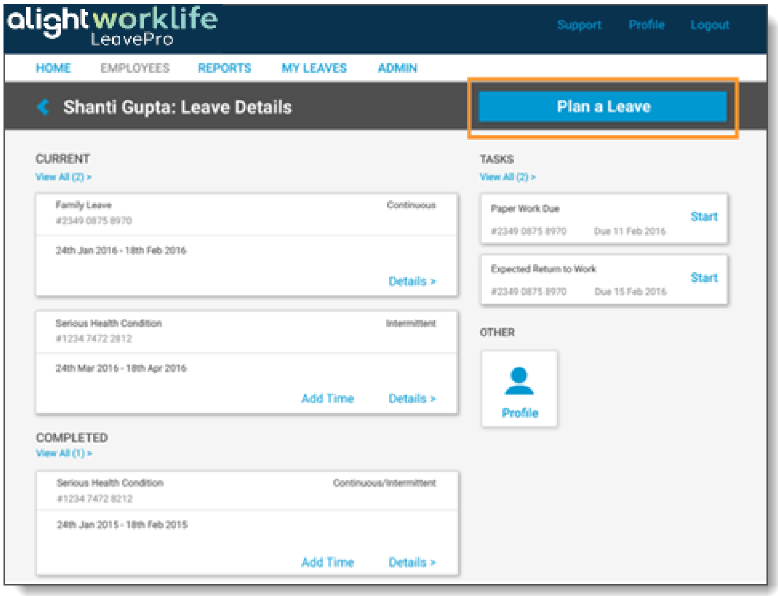
Plan a Leave for a Direct Report

You can submit a leave directly from the employee's Leave Details page.

1. Click **Details** for the employee.



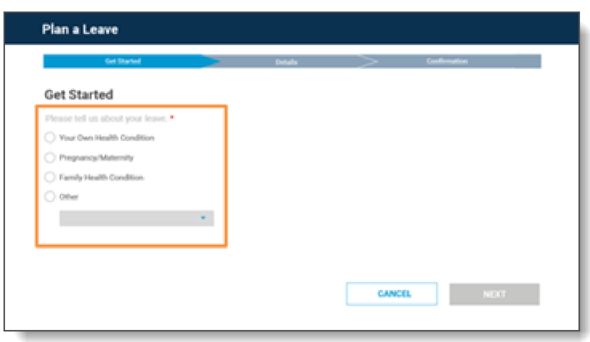
2. On the employee's Leave Details page, click **Plan a Leave**.



3. On the Plan a Leave page, select the leave type that describes the leave your direct report is taking, then click **Next**:

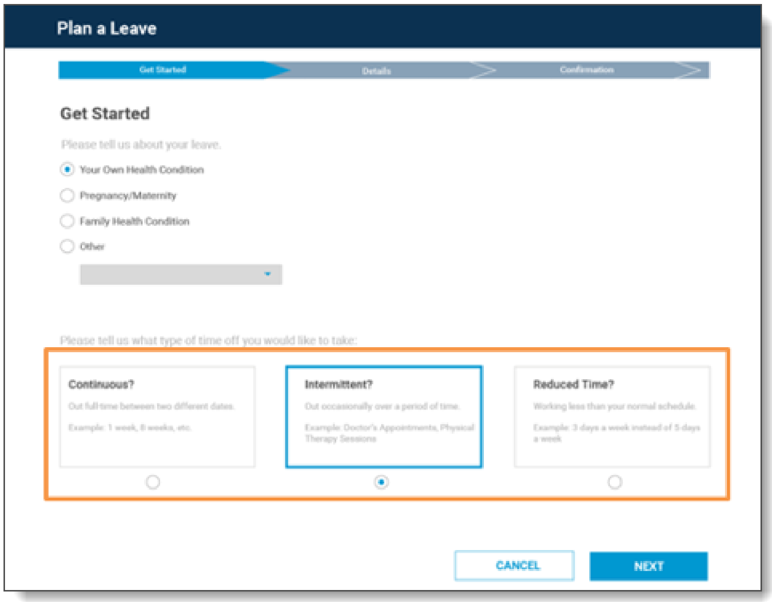
   - **Your Own Health Condition**
   - **Pregnancy/Maternity**
   - **Family Health Condition**
   - **Other**

   Note: Selecting Other activates the drop-down menu with employer-specific options.



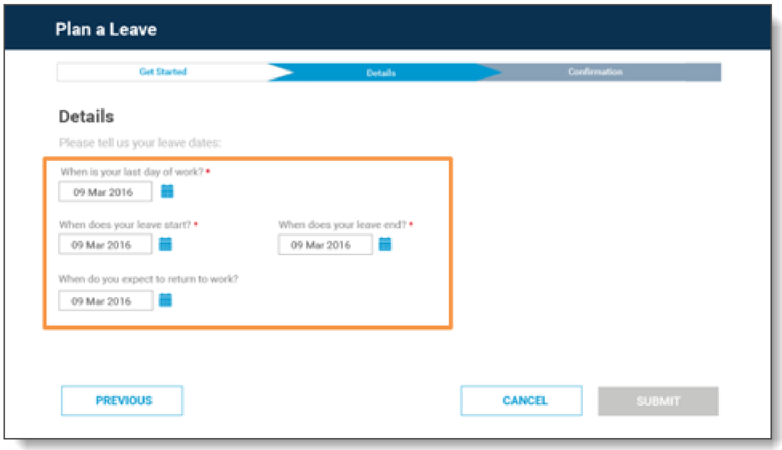
4. Select the **type of time off** that best fits the leave of absence your direct report is taking, then click **Next**:

- **Continuous** - Out full time between two different dates.
- **Intermittent** - Out occasionally over a period of time.
- **Reduced Time** - Working less than the normal schedule.



5. Add **Details**, such as:

- Last day of work (required)
- Leave start date (required)
- Leave end date (required)
- Date of your injury/illness
- Expected return to work
- Additional questions related to injury/illness
- Additional questions related to pregnancy/delivery
- Additional questions related to family members

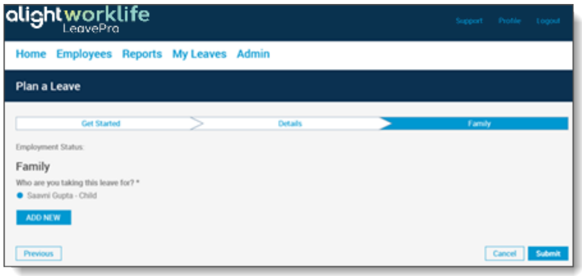


Note: Details differ based on the type of leave and type of time off selected.

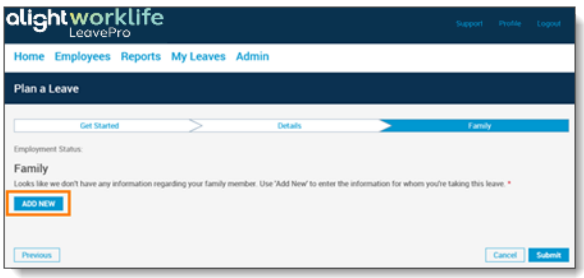
6. If your direct report is requesting a leave reason for a related person, the workflow will guide you to input their family member's information. This applies to leave reasons for another person, including:

    - Adoption
    - Alternate State Leave - Family
    - Bereavement
    - Care for Newborn
    - Family Health Condition
    - Family Injured Service Member
    - Family Injured Veteran
    - Family Military Exigency
    - Family Obligation
    - Foster Care
    - Medical Personal Leave of Absence - Family
    - Pregnancy with Complications
    - Pregnancy/Maternity
    - School Activities
    - Sick Child (Minor Health Condition) Requiring Care
    - Surrogacy

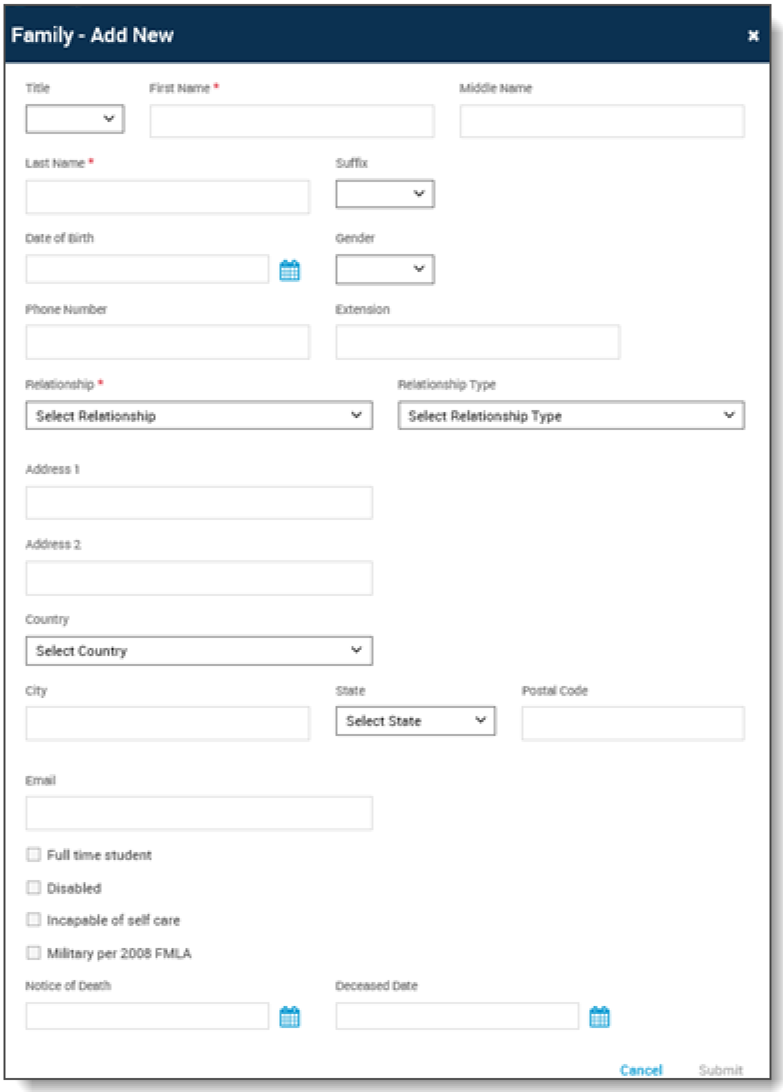
7. Select the family member for whom your direct report is taking the leave, and click Submit to continue.



Or, if you have not already entered information for their family member, click **Add New** to add a new family member's information.



In the Family - Add New modal, supply all required information (designated with an asterisk).

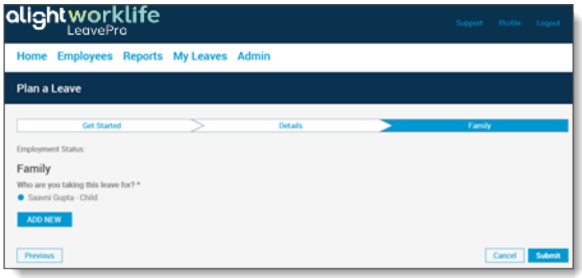


Depending on your direct report's leave reason, relationship type, and work state, some information will be present, required, or preselected, for example:

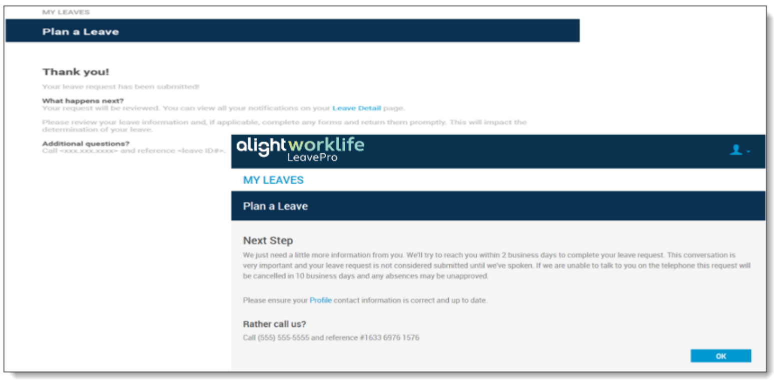
- "Gender" is only required when Domestic Partner is selected as the Relationship.
- "Date of Birth" is only required when Child or Grandchild is selected as the Relationship.
- For Pregnancy/Maternity, "Child" and "Biological" are preselected for Relationship and Relationship Type respectively.

Click **Submit** when all required information has been provided in the modal to continue the Plan a Leave workflow. Click Cancel or X to close the modal without saving the information provided.

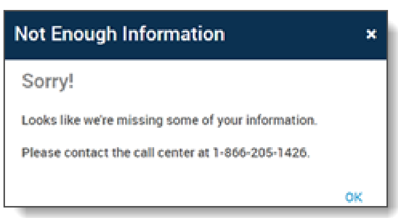
Once the modal has closed, select the new family member you just added, then click **Submit** to continue.



8. When all required information has been submitted, one of two confirmation messages will appear with next steps.



9. An error message will display if an error is encountered while trying to plan a leave that prevents you from completing the process online.

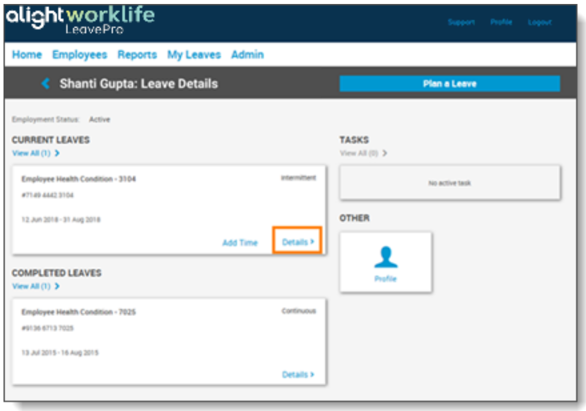


This would occur if the roster file provided by your employer fails to provide necessary information in order for LeavePro to complete a leave (for example, Work Schedule data).

If you receive an error and are unable to complete the setup of a new leave, call the Call Center to complete the process.

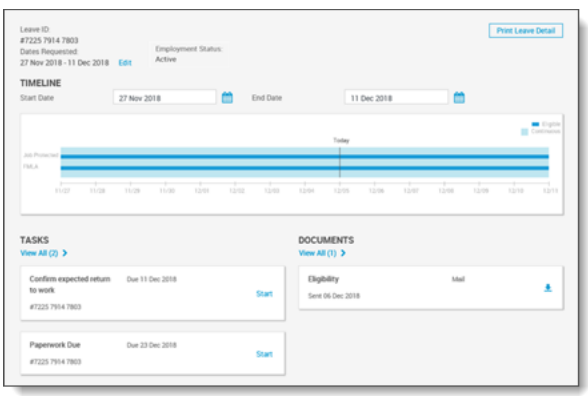
Leave Details for a Direct Report

Click **Details** for a current or completed leave to review the details of that leave.



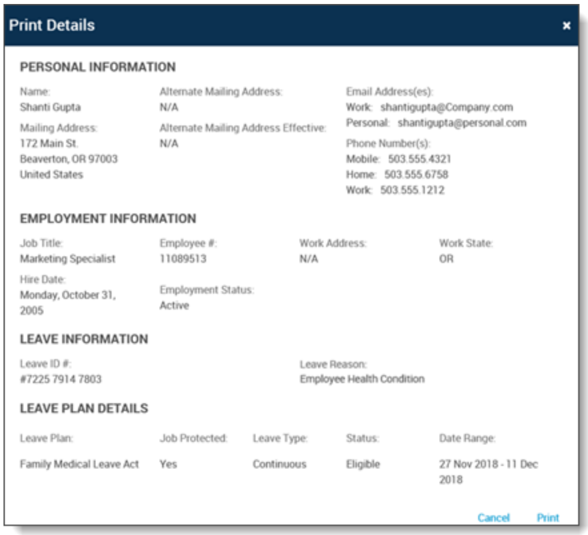
Details include:

1. **Timeline** - A graphical representation of the leave.
2. **Tasks** - Tasks specific to the leave. Click Start to initiate a task for an employee.
3. **Documents** - Documents specific to the leave. Click the download icon to view documents.



Print Leave Detail

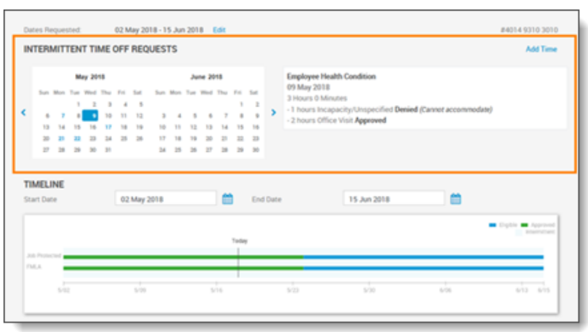
Click the Print Leave Detail button on the Leave Detail page to open the Print Details modal displaying the details of your direct report's personal information, their employment information, their leave information, and their leave plan details.



Click **Print** to print the Print Details modal, or click **Cancel** or **X** to close it.

Intermittent Time Off

If a current leave includes intermittent time off requests (ITORs), the Intermittent Time Off Requests section will appear on the Leave Details page for that leave.



The calendar view displays two months, the current month and next month. Scroll to see previous or future months.

Dates with ITORs (for that leave only) appear blue in the calendar. The ITOR detail tile (to the right of the calendar) shows details for today's date. Click a date to view the ITOR details for that date.

The ITOR detail tile includes:

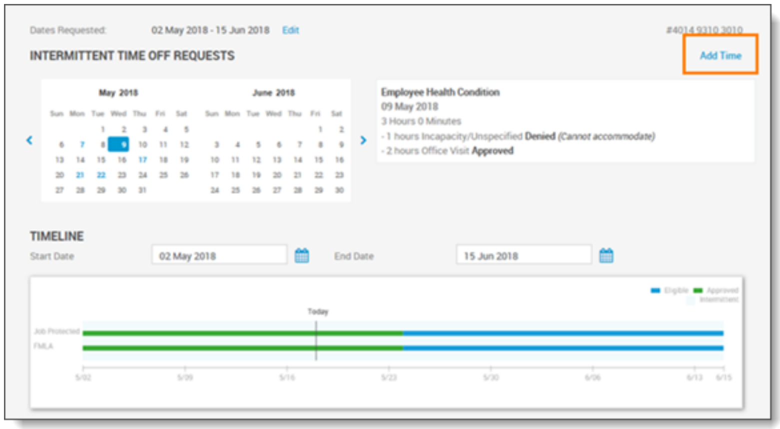
- Leave reason
- ITOR date
- Total number of ITOR hours and minutes for that date
- Hours and ITOR type (for example, Incapacity/Unspecified, Office Visit)

- ITOR status (for example, requested, approved, pending, denied) and denied reason (for denied ITORs)

If there are no ITORs for a selected date, the detail tile displays, "No time off requests for [Day Month Year]."

Add Intermittent Time Off

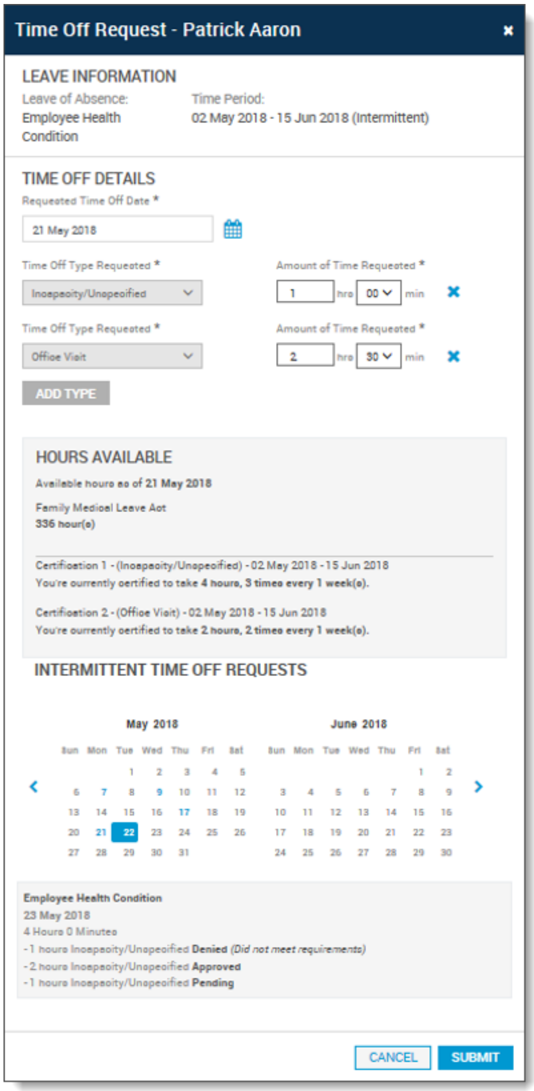
To add intermittent time off to the current leave, click the Add Time link. The Add Time link is available depending on your permissions.



Clicking the Add Time link opens the Time Off Request screen.

To add an ITOR request to an existing leave:

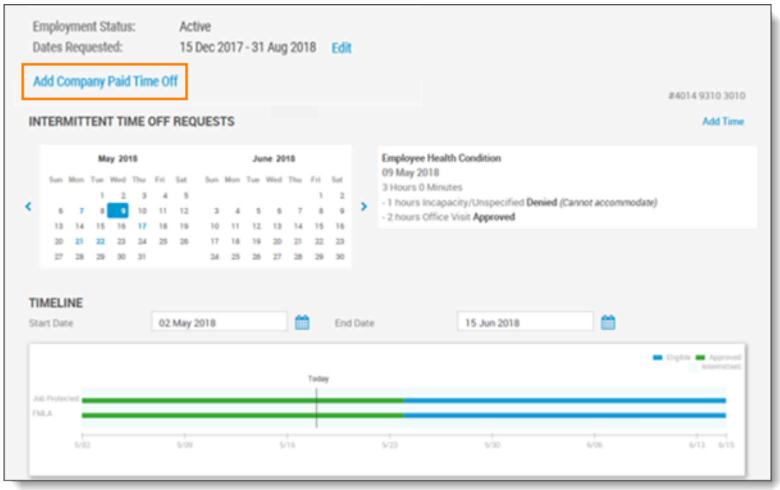
1. Click the date for the new ITOR.
2. Select the Time Off Type Requested.
3. Select the Amount of Time Requested.
4. Click Submit.



Add Company Paid Time Off

Note: The Add Company Paid Time Off feature is configurable by client. By default, it is not enabled. If this feature is not enabled for your company, you will not see the Add Company Paid Time Off link.

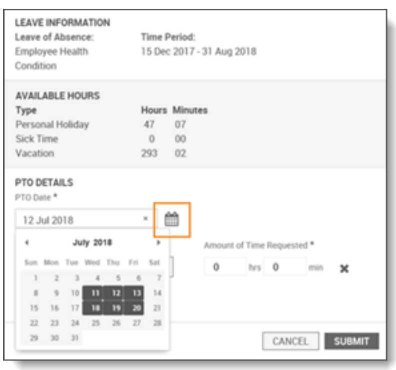
You can report paid time off (PTO) on an open leave by clicking Add Company Paid Time Off on the Leave Detail page. PTO can only be applied on open leaves, and the date of the PTO must fall within the leave start and end dates.



The link opens the PTO Request modal. The modal shows the leave information for your direct report's open leave, available hours and minutes by type, and PTO details for the leave, if any.

To request PTO:

1. Enter the PTO Date. Highlighted dates on the calendar indicate which dates have PTO requests.

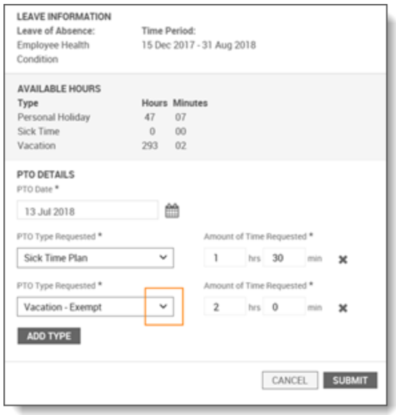


   You can input PTO for a date (today or later) for multiple PTO types per day. For example, you can input two hours of sick time, one hour of vacation, and five hours personal holiday for a single date.

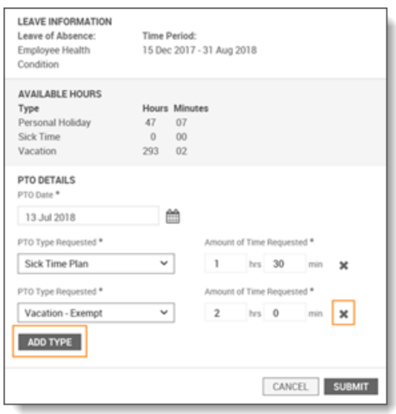
   You can also input PTO for multiple dates at once. For example, you can input two hours of sick time for one date, then select a different date to input three hours of vacation.

   You cannot update PTO for dates that occurred in the past; you can only change PTO data for dates today or later.

2. Choose the PTO Type Requested from the drop-down menu. Only PTO types offered by your employer will appear in the menu.



3. Enter the Amount of Time Requested in hours and minutes.
4. Click **Add Type** to generate additional PTO fields. Click the "**x**" next to any PTO requested to delete the request.



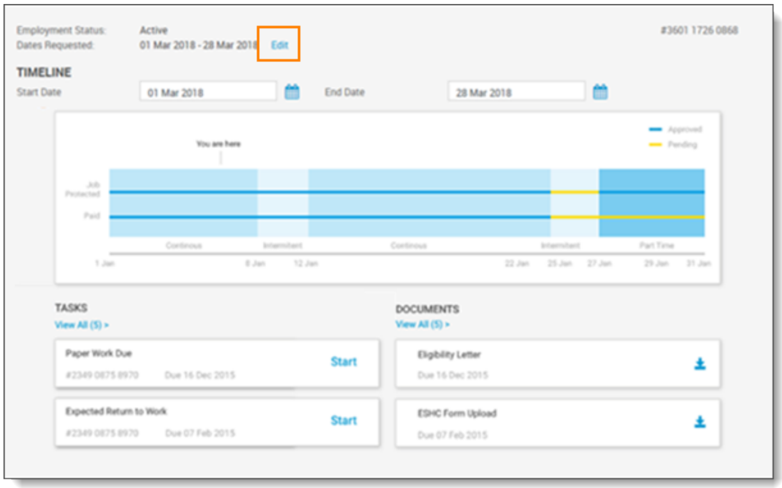
5. Click **Submit** when finished.

Change Leave Start Date and/or End Date

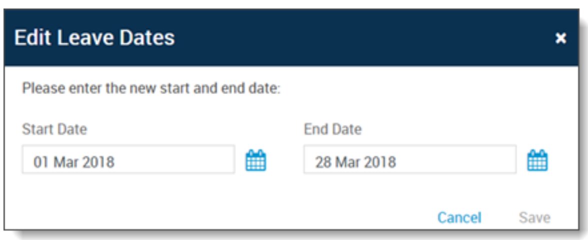
You can change the leave start date and /or leave end date behalf of another employee with the Edit link on the Leave Detail page. The Edit link shows on the Leave Detail page for Open leaves only. The link is not displayed for closed (Completed), Canceled, or Incomplete leaves.

To change an employee's leave start and/or end dates:

1. Click **Edit** in the Leave Detail page for the leave you want to modify.



2. In the Edit Leave Dates pop-up window, use the date pickers to enter new start and/or end dates.



3. Click **Save** to submit your request.

Cancel Leave

Note: The ability to cancel a leave using Self-Service is configurable by client. If you do not have the required permissions to cancel a leave, you will not see the Cancel Leave link and button.

You can cancel a leave on behalf of an employee from the **My Leaves** page or the **Leave Detail** page if all of the following conditions are met:

- All of the leave segments are pending determination (i.e. the leave plan status is Pending Determination, Eligible, or Eligibility Undetermined).

  Note: You may not cancel a leave in Self-Service if any leave segments are already determined.

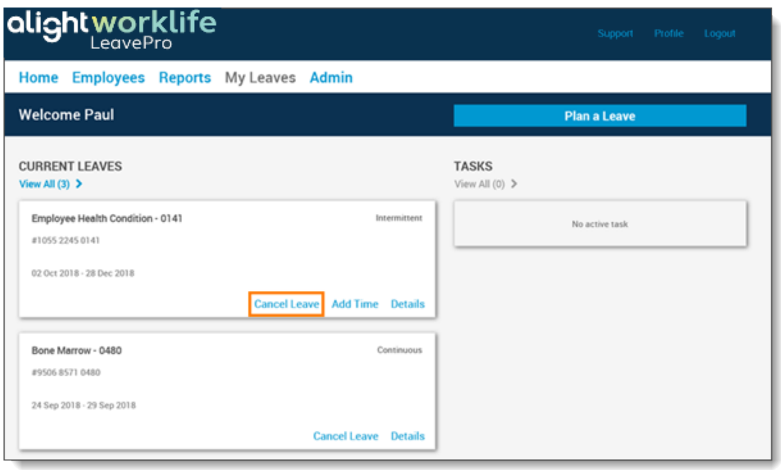
- The leave start date must be in the future.

- Tasks have not been completed on the leave.
  - If the task status is not started or canceled, you may cancel the leave (this includes Self-Service tasks, Call Center tasks, and manual tasks).
  - You may cancel the leave if the Eligibility Confirmation tasks or Leave Intake Reminder have been complete.

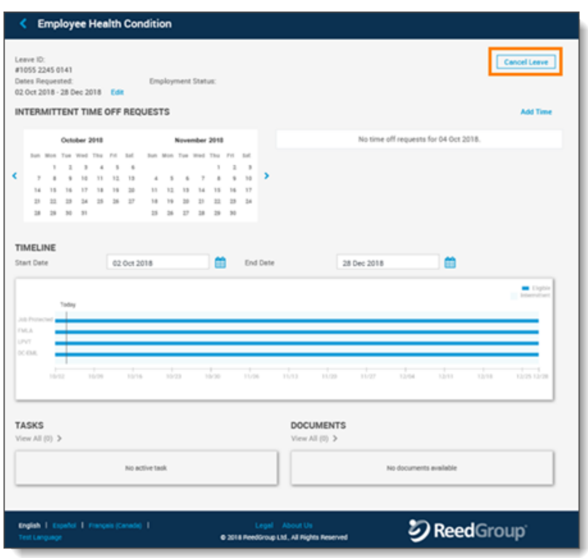
You may cancel a leave during intake before intake is complete.

To cancel a leave:

1. On the My Leaves page, click the Cancel Leave link for the leave you want to cancel.

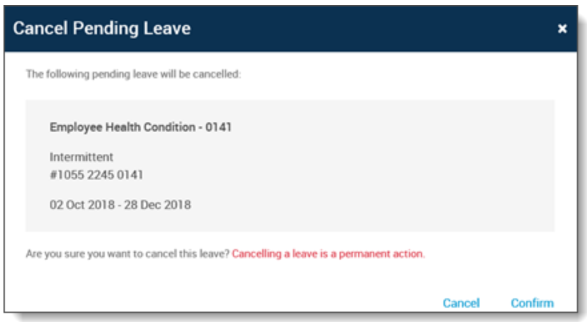


Or, click the Cancel Leave button on the Leave Detail page for the leave you want to cancel.

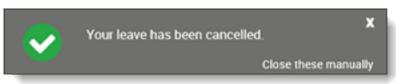


Note: The link and button are only displayed when a leave meets the conditions to be canceled in Self-Service. Otherwise, the link and button are hidden.

2. The Cancel Pending Leave pop-up will appear. Click **Confirm** to cancel the leave, or click **Cancel** to close the pop-up without canceling the leave.



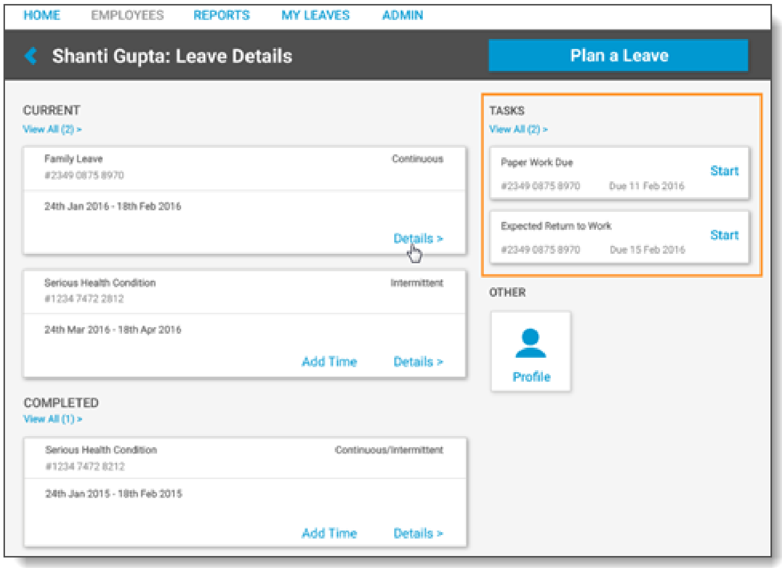
3. A notification will appear confirming your leave has been canceled.



4. Once a leave has been canceled, it will be removed from the employee's Current Leaves on the My Leaves Page.
5. When you cancel a leave, LeavePro cancels the leave and any tasks for the leave (except manual tasks), sends the Case Closed letter, and logs the activity in the Call Center Leave Chronology.

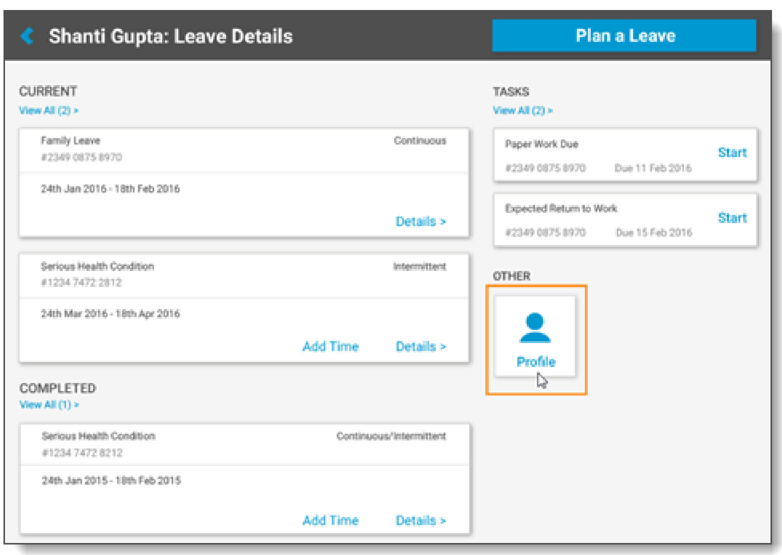
Tasks for a Direct Report

Click Start for a task card to initiate that task for a direct report.



Profile for a Direct Report

You have access to view all of the details in your direct report's Profile page. However, you cannot edit the information in your direct report's profile; all information is read-only.



Reports Tab

The **Reports** tab lets you access the information you need to manage your employee's absences. You will only have access to this tab if your permissions expanded beyond employee-only permissions (usually administrative or manager access).

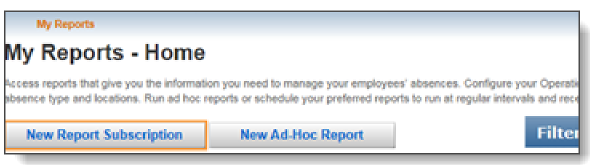
With Reports, you can:

- Create a New Report Subscription (Scheduled)
- Create a new Ad-Hoc Report
- Filter report lists
- View existing Ad-Hoc and Scheduled Reports

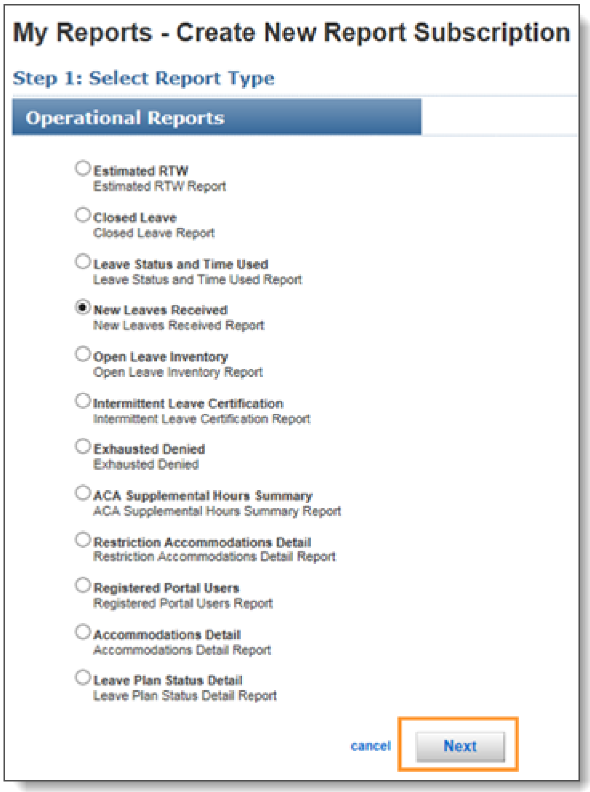
Create a New Report Supscription

To create a New Report Subscription (pre-scheduled, recurring report):

1. Click **New Report Subscription**



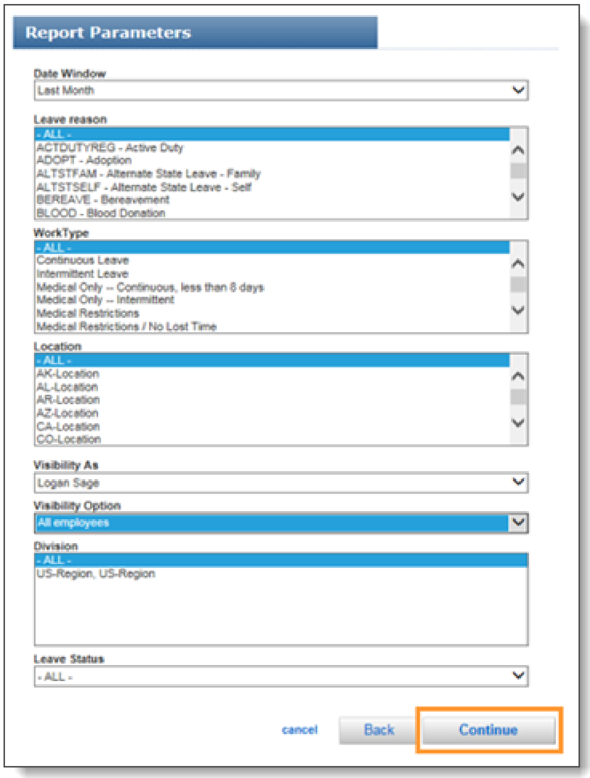
2. Select the **Operational Report** you want to generate.
3. Click **Next**.



4. Choose the Report Parameters:

    - Multiple selections can be made for each of the options by holding shift while clicking the options.
    - If you are running the report and are not the direct supervisor, the view must be expanded to "all employees".

5. After the parameters are selected, click **Continue**.

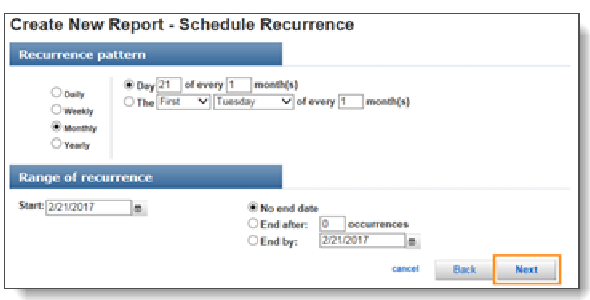


Note: The Location and Division fields contain organizational details dictated by the clients' roster file.

6. **Schedule Recurrence** - Select the frequency you need the Operational Report to generate:

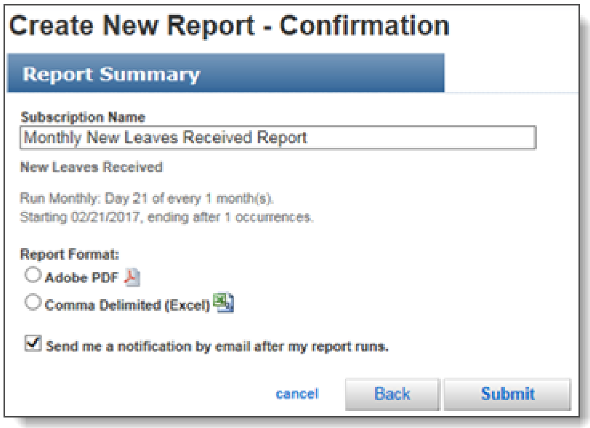
    - Recurrence pattern (day of week, bi-weekly, day of month, etc.)
    - Range of recurrence (duration and number of occurrences desired)

7. Click **Next**.



8. **Confirm** the frequency and select the name and format:

- The name is free-form text and will display in the resulting file name.
- Confirm the previously determined frequency.
- Select the desired format (PDF or Excel).
- Choose if you would like to receive an email notification of report completion.



9. Click Submit to finalize, Back to make corrections, or Cancel to cancel the New Report Subscription.

Once the report subscription has been submitted, you will receive confirmation of its creation.

You can choose to:

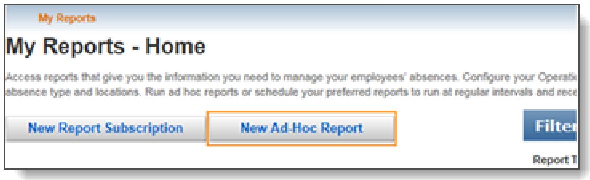
- Schedule an additional copy (off-cycle).
- Run an ad-hoc version of the report.
- Deactivate future occurrences.

Create a New Ad-Hoc Report

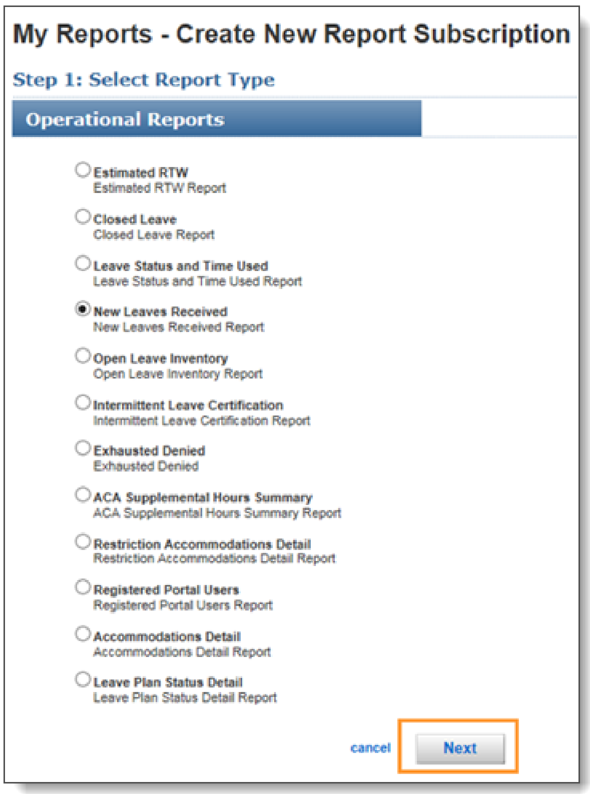
An ad-hoc report is a one-time report.

To create an ad-hoc report:

1. Click New Ad-Hoc Report.



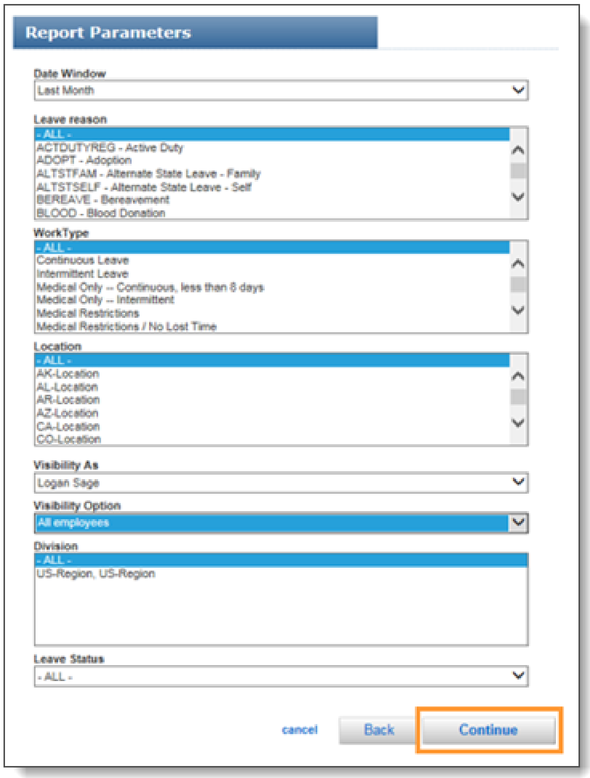
2. Select the Operational Report you want to generate, and click Next.



3. Choose the Report Parameters:

   - Multiple selections can be made for each of the options by holding shift while clicking the options.
   - If you are running the report and are not the direct supervisor, the view must be expanded to "all employees".

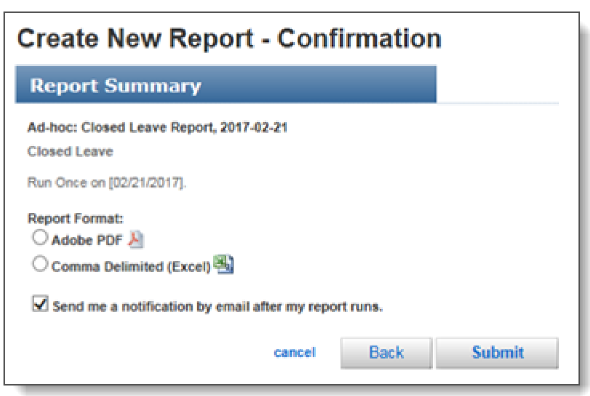
4. After the parameters are selected, click **Continue**.



Note: The Location and Division fields contain organizational details dictated by the clients' roster file.

5. **Confirm** the frequency and select the name and format:

   - The name is free-form text and will display in the resulting file name.
   - Select the desired format (PDF or Excel).
   - Choose if you would like to receive an email notification of report completion.

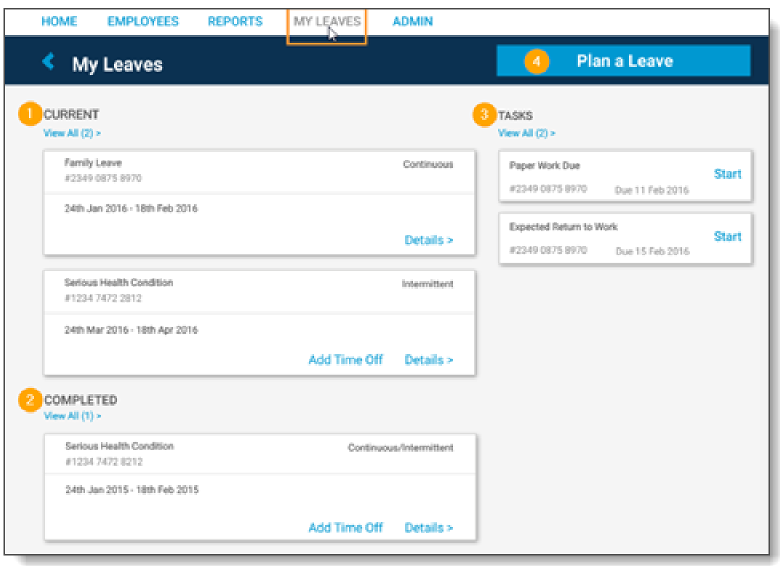


6. Click **Submit** to finalize, **Back** to make corrections, or **Cancel** to cancel the New Report Subscription.

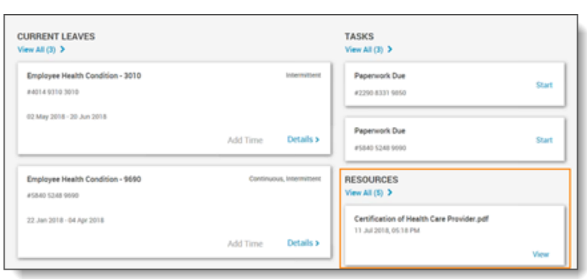
My Leaves Tab

The **My Leaves** main landing page provides four main areas to manage your own leaves.

1. **Current Leaves**
    - Review status of the two most recent leaves.
    - Report intermittent time off.
2. **Completed Leaves** - Review details of completed leaves.
3. **Tasks**
    - Confirm expected return to work.
    - Review and upload paperwork due.
4. **Plan a Leave** - Begin a new claim entry.

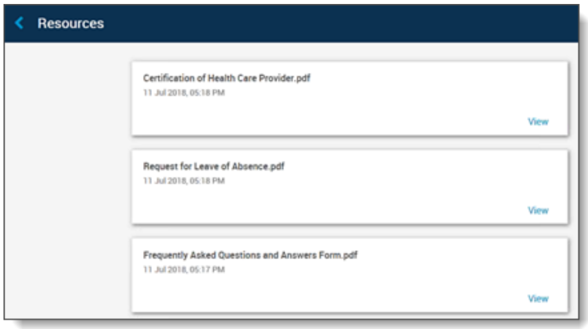


If configured by your employer, the My Leaves page might also show a **Resources** section.



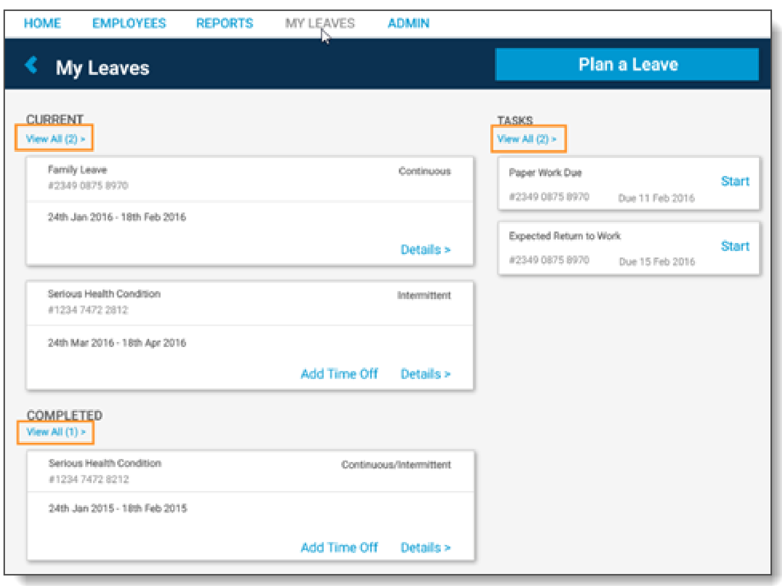
In Resources, you can view client documents (e.g. clients pan forms, plan policies, leave forms).

To view the Resources page, click **View**. The Resources page displays the full document list. To view a specific document, click View for the document you would like to see.



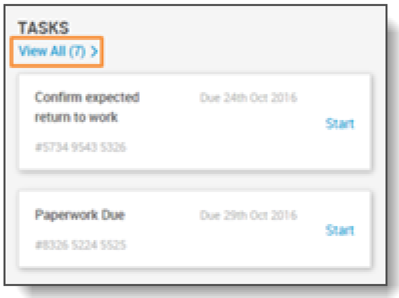
View All

Each section on My Leaves has a View All option, which shows the total number of items available for each section.

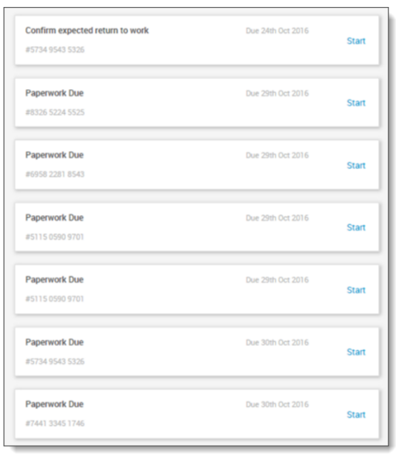


To see all Leaves or Tasks in a section:

1. Click **View All** in the section you would like to expand.



2. The page will show all items in that section. If the section contains more items than can be displayed, a **More** link will appear to route you to additional items.



3. Take action for a specific item in View All, or return to My Leaves to display fewer items.

Leave Detail Page

When you click Details for a leave, you are taken to the Leave Detail page. On this page, you can:

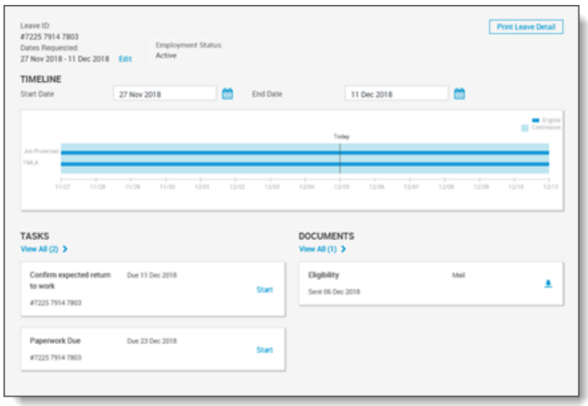
- Review details for a current or completed leave
- Add intermittent time off to a current leave
- View the coverage Timeline
- View and initiate tasks (Confirm Expected Return to Work or Paperwork Due)
- View documents associated with a leave
- Print leave details

Current Leaves

You can click **Details** for a specific Current Leave to access management features on the Leave Detail page.

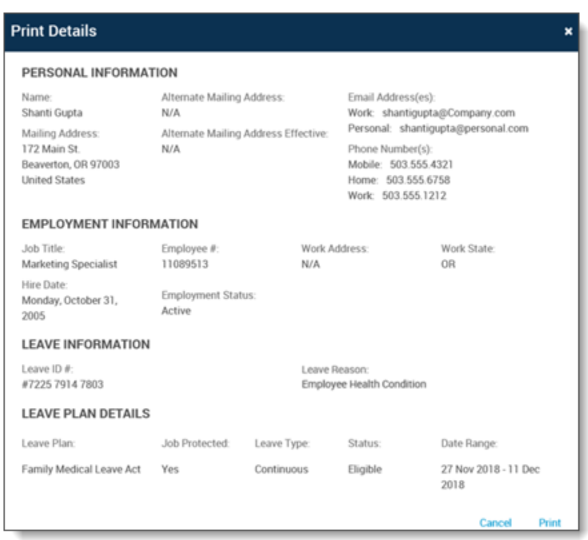
Details Include:

- A **Timeline** specific to the leave
- **Tasks** specific to the leave
- **Documents** specific to the leave

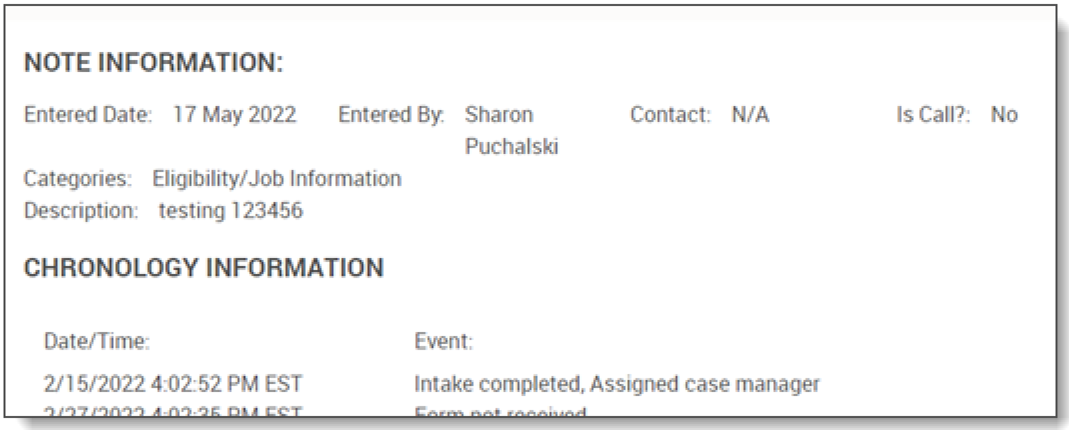


Print Leave Detail

Click the Print Leave Detail button on the Leave Detail page to open the Print Details modal displaying the details of your personal information, your employment information, your leave information, and your leave plan details.



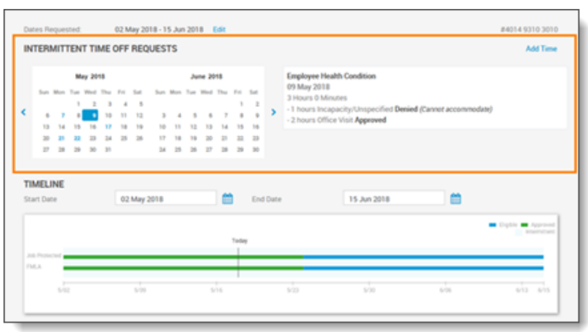
If you are logged in as an Admin role, you will see **Note Information** specific to this leave.



Click **Print** to print the Print Details, or click **Cancel** or X to close it.

Intermittent Time Off

If a current leave includes intermittent time off requests (ITORs), the Intermittent Time Off Requests section will appear on the Leave Detail page for that leave.



The calendar view displays two months, the current month and next month. Scroll to see previous or future months.

Dates with ITORs (for that leave only) appear blue in the calendar. The ITOR detail tile (to the right of the calendar) shows details for today's date. Click a date to view the ITOR details for that date.

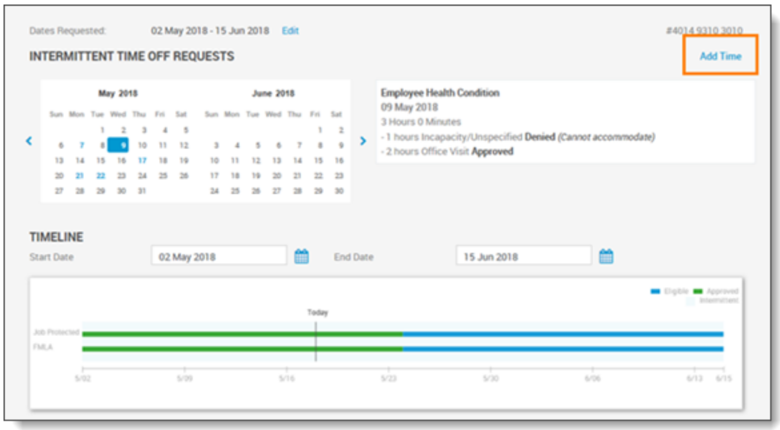
The ITOR detail tile includes:

- Leave reason
- ITOR date
- Total number of ITOR hours and minutes for that date
- Hours and ITOR type (for example, Incapacity/Unspecified, Office Visit)
- ITOR status (for example, requested, approved, pending, denied) and denied reason (for denied ITORs)

If there are no ITORs for a selected date, the detail tile displays, "No time off requests for [Day Month Year]".

Add Intermittent Time Off

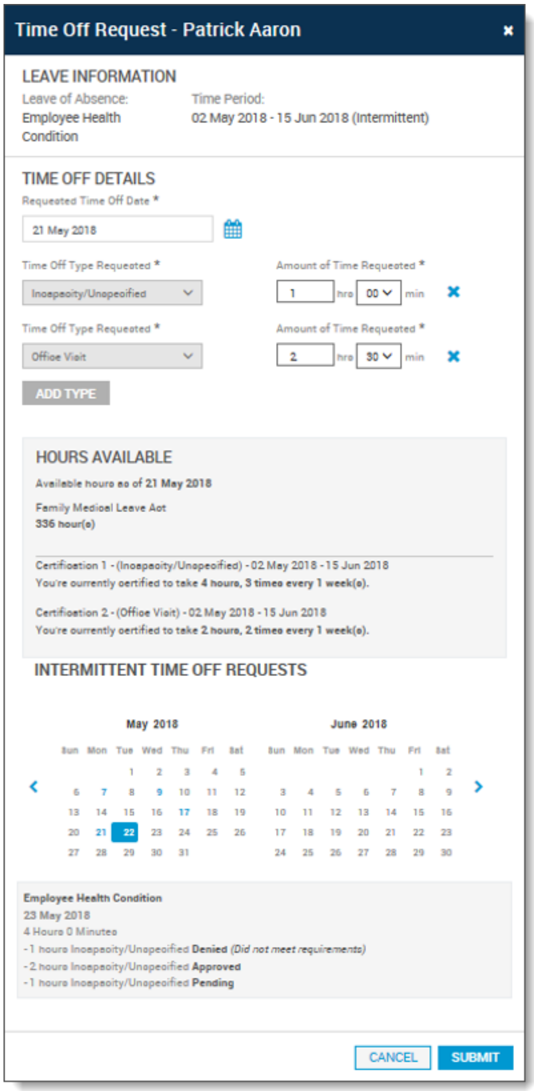
To add intermittent time off to the current leave, click the Add Time link. The Add Time link is available depending on your permissions.



Clicking the Add time link open the Time Off Request screen.

To add an ITOR request to an existing leave:

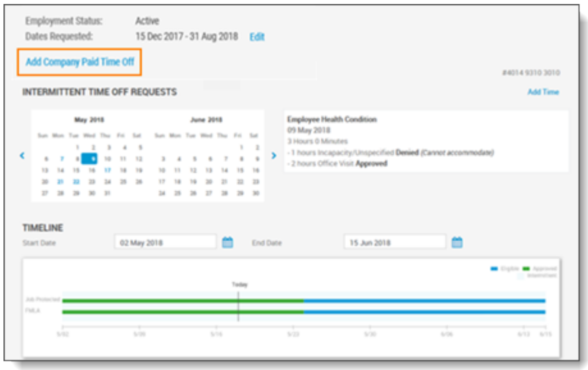
1. Click the date for the new ITOR.
2. Select the Time Off Type Requested.
3. Select the Amount of Time Requested.
4. Click Submit.



Add Company Paid Time Off

Note: The Add Company Paid Time Off feature is configurable by client. By default, it is not enabled. If this feature is not enabled for your company, you will not see the Add Company Paid Time Off link.

You can report paid time off (PTO) on an open leave by clicking **Add Company Paid Time Off** on the Leave Detail page. PTO can only be applied on open leaves, and the date of the PTO must fall within the leave start and end dates.

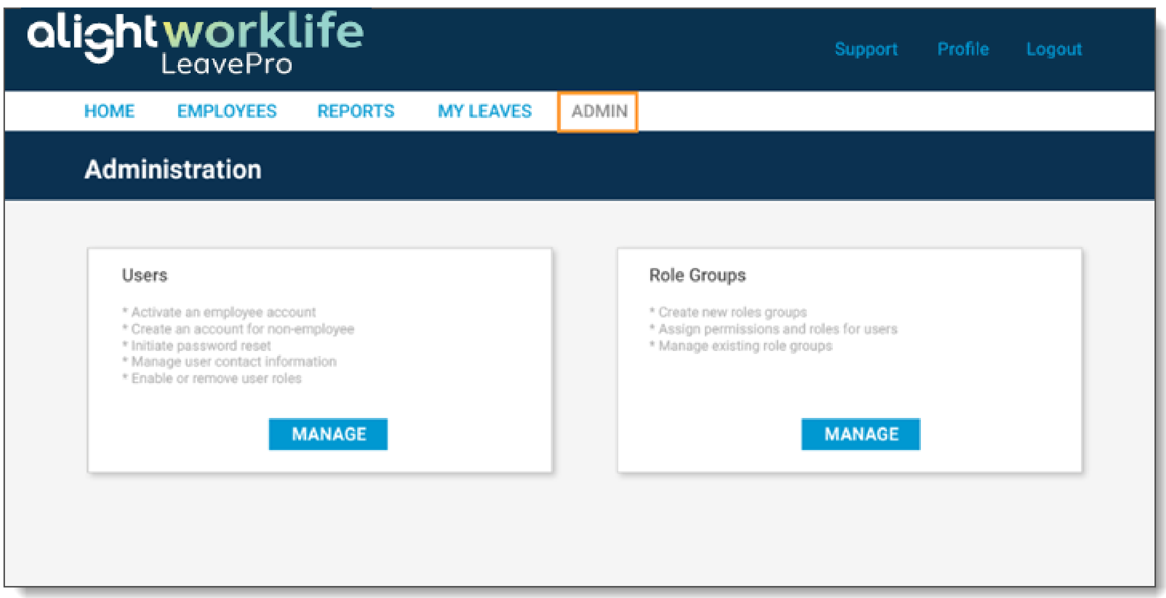


The link opens the PTO Request modal. The modal shows the leave information for your direct report's open leave, available hours and minutes by type, and PTO details for the leave, if any.

Admin Tab

The following operations can be done from the Admin tab:

- Create **Non-Employee Users**
- Add or Manage **Roles** for all direct reports
- Enable the **Password Reset** function for all direct reports
- Add and Manage **Peer Relationships** for all direct reports
- Add and Manage **Role Groups** for all direct reports

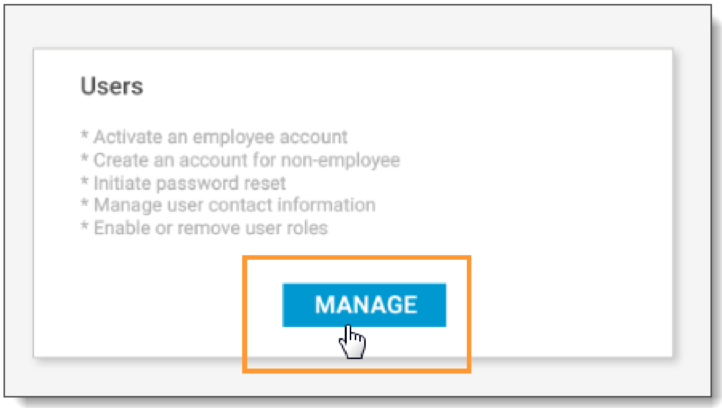


Create Non-Employee Users

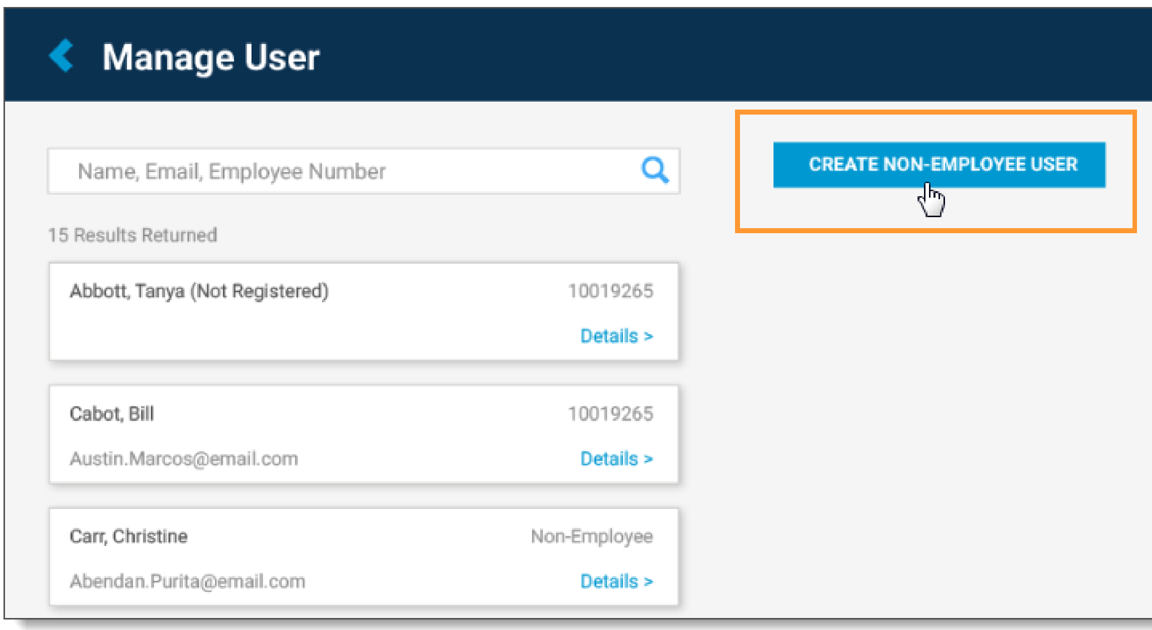
Using the Create Non-Employee Users operation, you can establish LeavePro credentials for third-party users who are not on the client's roster file.

To create a non-employee user:

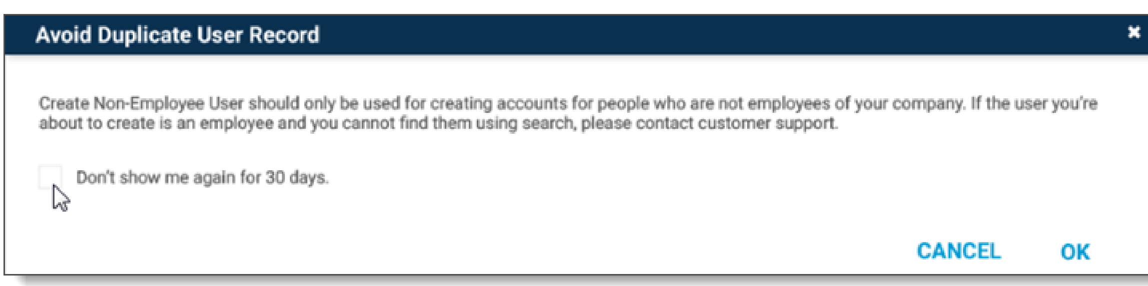
1. Click **Manage** in the Users Card.



2. Click **Create Non-Employee User**.



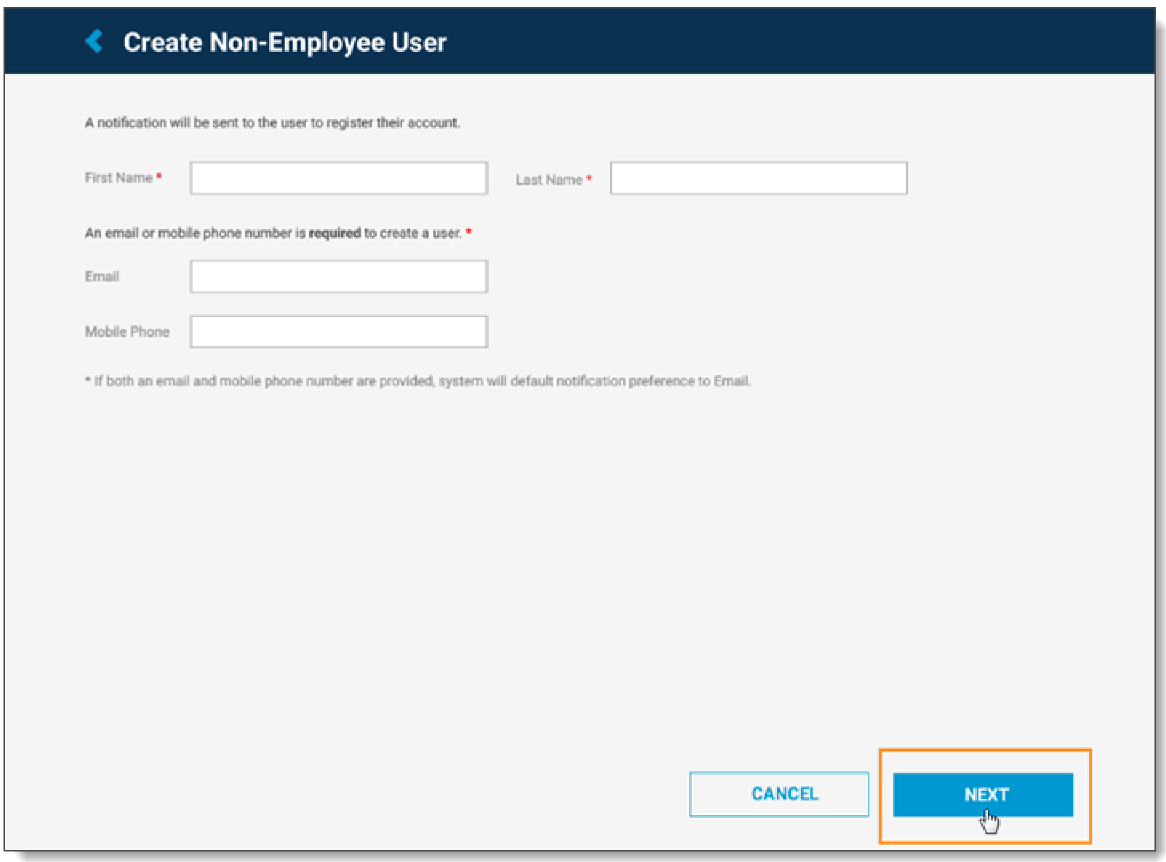
3. Select whether you want to see the **Avoid Duplicate User Record** message in the future.



- If you do not want to see the message, select the check box and click **OK**.
- If you would like to see the message each time you create a non-employee user, click **OK**.

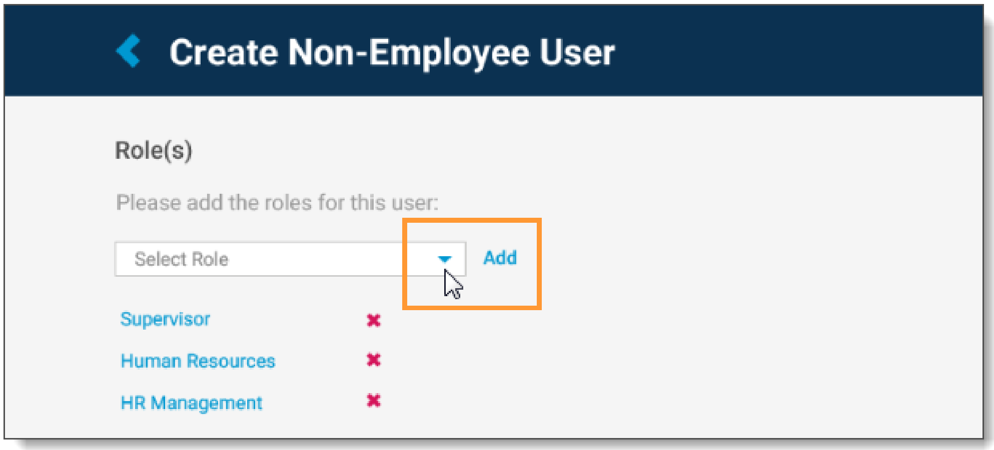
4. Enter the Non-Emplyee User's information:

    - First Name
    - Last Name
    - Either Email or phone number (at least one is required)
    - Click **Next**.



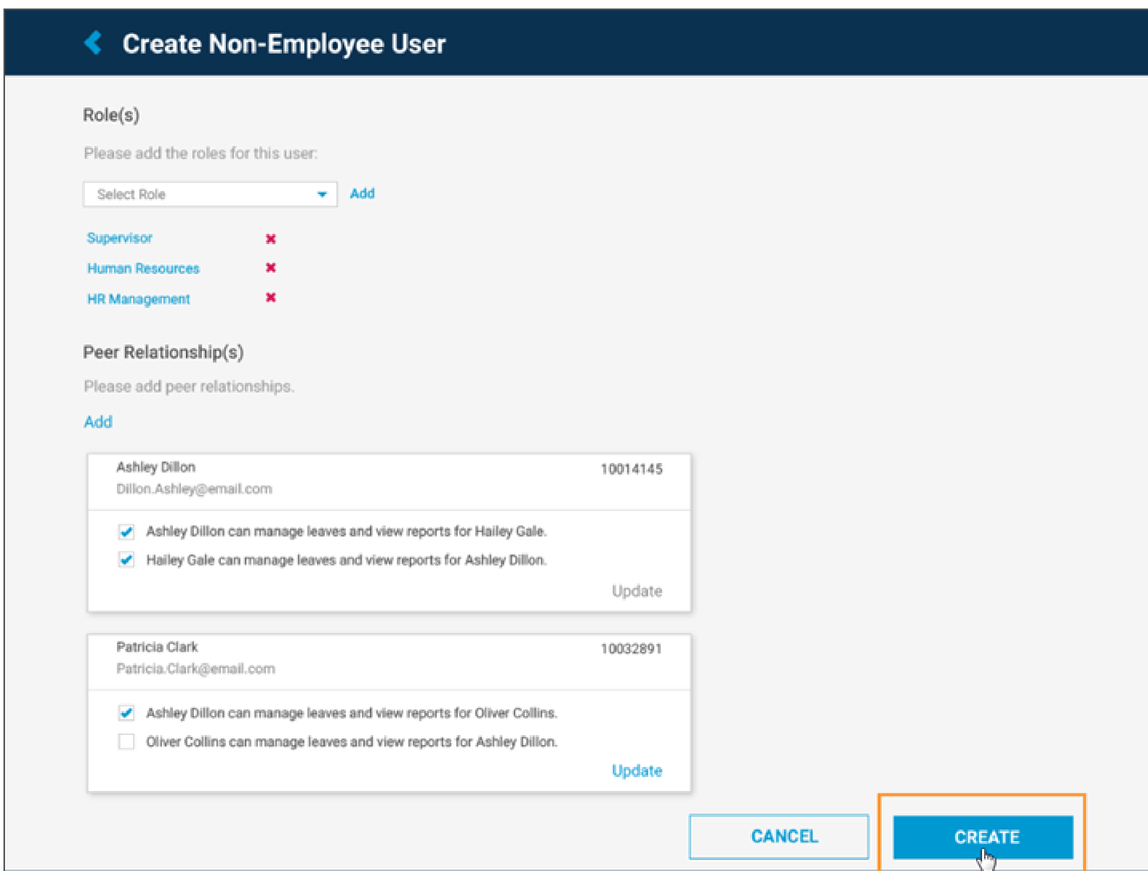
Note: A text message or email is delivered to the non-employee user after their information is entered. The message instructs the user to complete the registration process.

5. Choose a role for the Non-Employee User from the drop-down menu, and click **Next**.

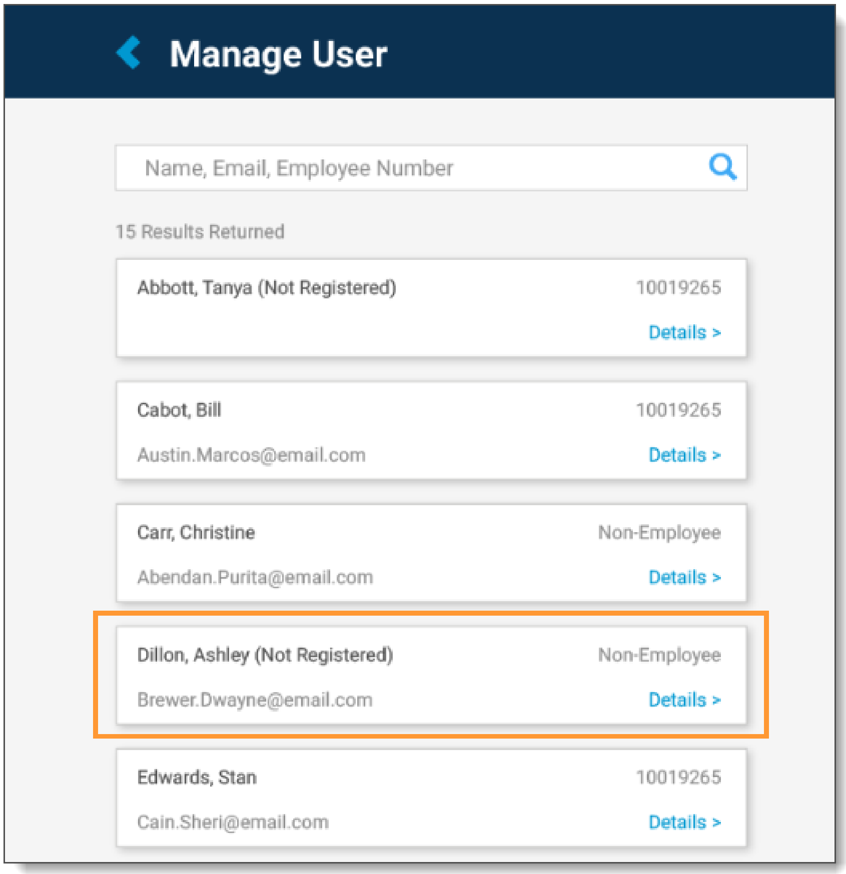


To remove a role that was previously added, click the red **X** to the right of the role you want to remove.

6. Click **Create** when finished.



7. The newly create Non-Employee User is added to your list of users as **Not Registered**.

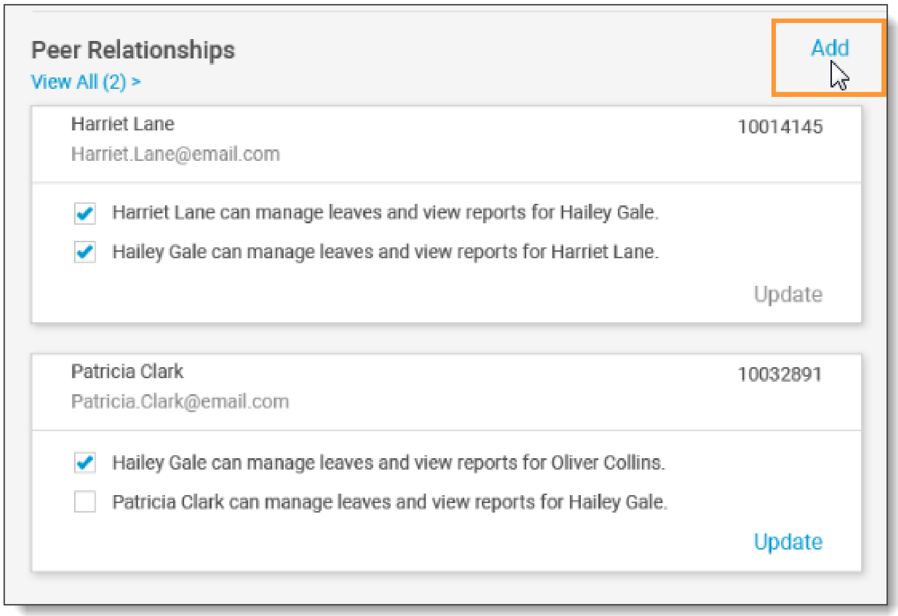


Peer Relationship

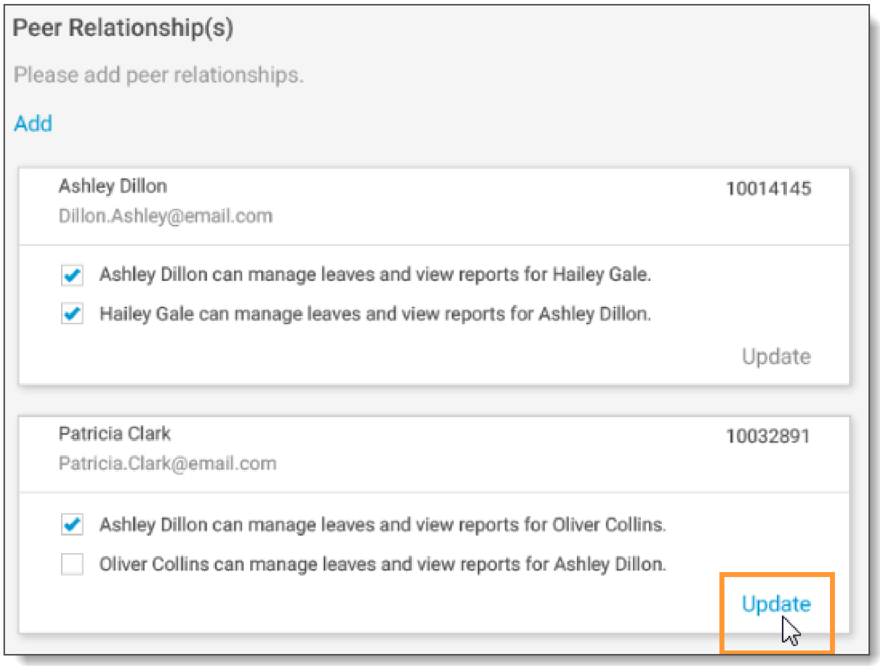
Peer Relationships allow you to share access to the direct reports of an Employer Self-Service user.

To add a Peer Relationship:

1. From the **Users** section of the Administrative screens, click **Add** in Peer Relationships.



2. Select the person that a Peer Relationship is to be established with.
3. Define which type of relationships should exist:
    - There are two ways that Peer Relationships can exist:
        - A user can grant other employees with access to the user's own direct reports.
        - A user can grant themselves access to another supervisor's direct reports.
    - Select the check box to the left of the access option you want to initiate. You can select both options.
4. Click **Update** when finished.

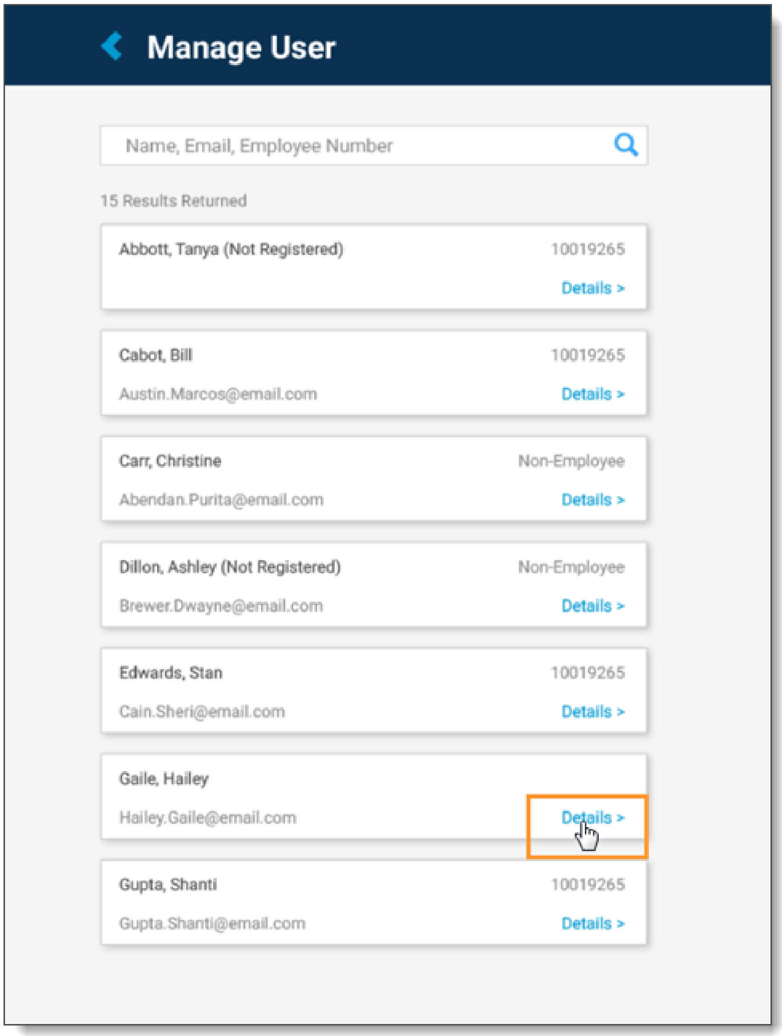


Password Reset

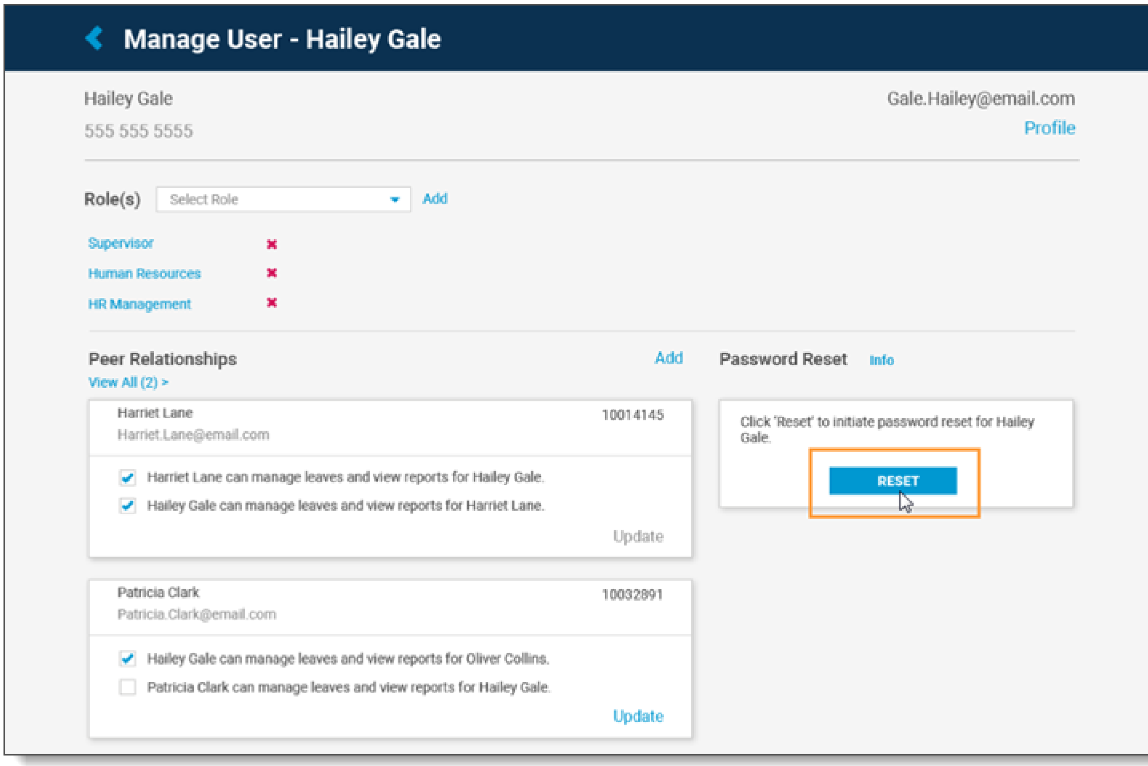
A direct report's password can only be reset by their direct supervisor, or by a supervisor who has been granted access to the direct report through Peer Relationships.

To initiate a password reset:

1. From the Manage Users screen, click **Details** for the employee who needs their password reset.



2. Click **Reset** in the Password Reset section.



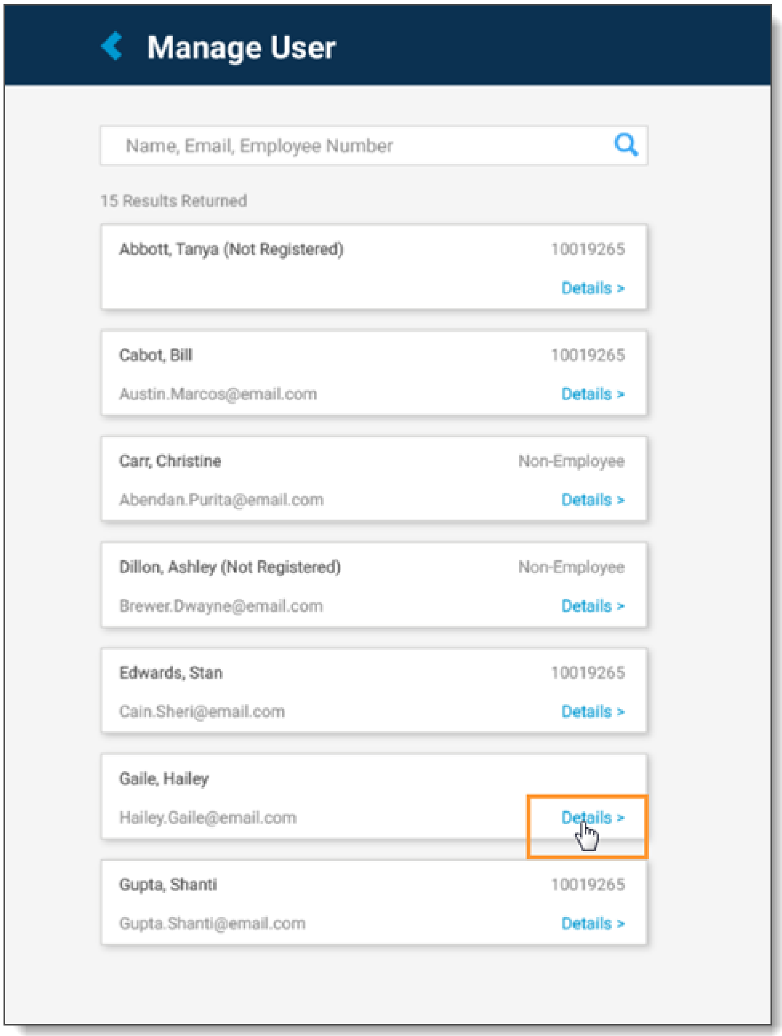
This initiates a communication to the direct report, enabling them to complete the process.

Adding or removing roles

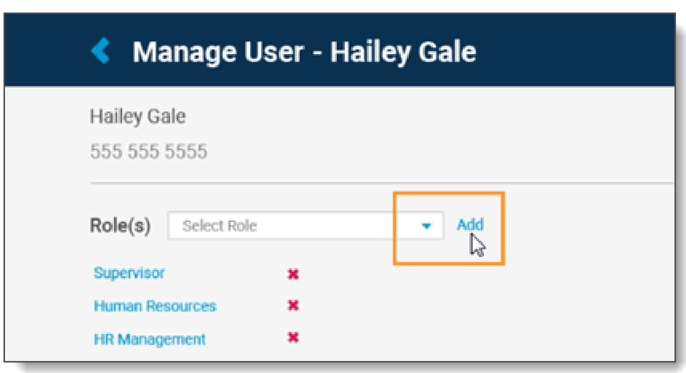
As an administrator you can update the available roles that are applied to a direct report in Employer Self-Service. Roles dictate what permissions a Self-Service user has within the portal.

To add a role to an employee's profile:

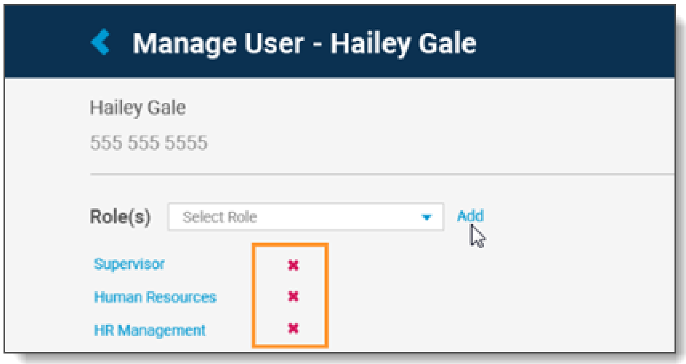
1. From the Manage Users screen, click **Details** for the employee whose role you are modifying.



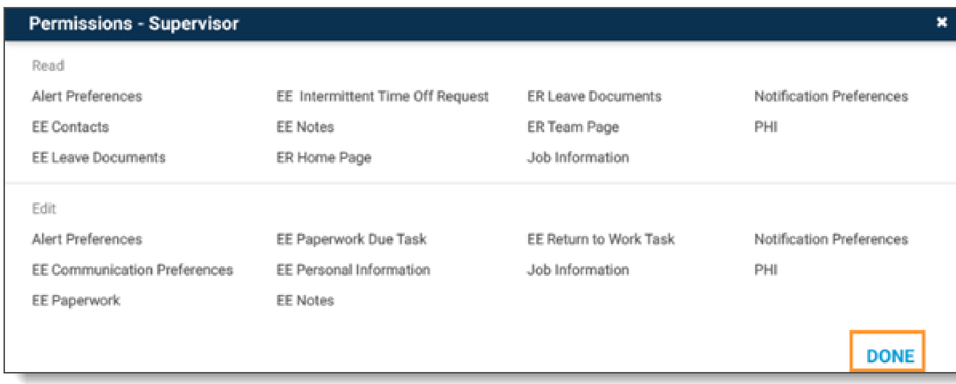
2. Choose a role from the drop-down menu that you would like to add to the employee's profile, and click **Add**.



To remove a role that was previously added, click the red **X** to the right of the role to be removed, then click **Save**.



Read and Edit permissions specific to that role will be displayed. Click **Done** when finished.

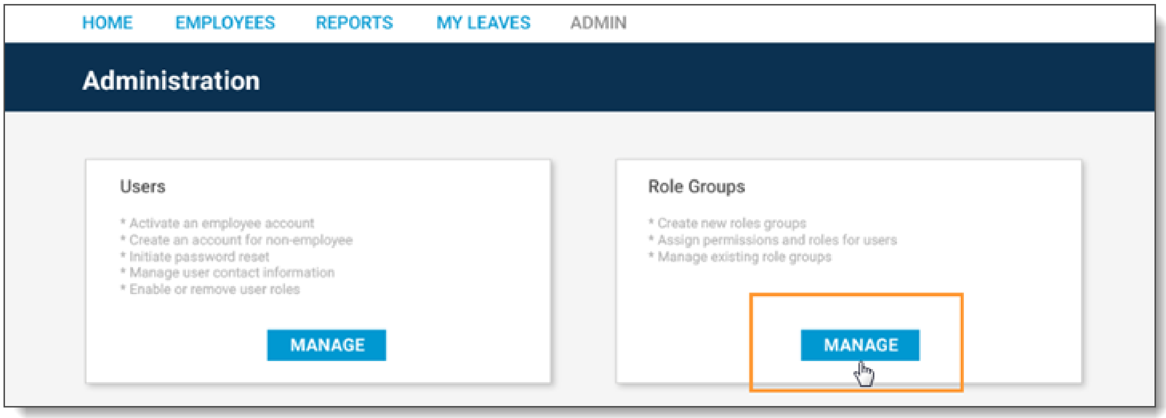


Administrative functionality

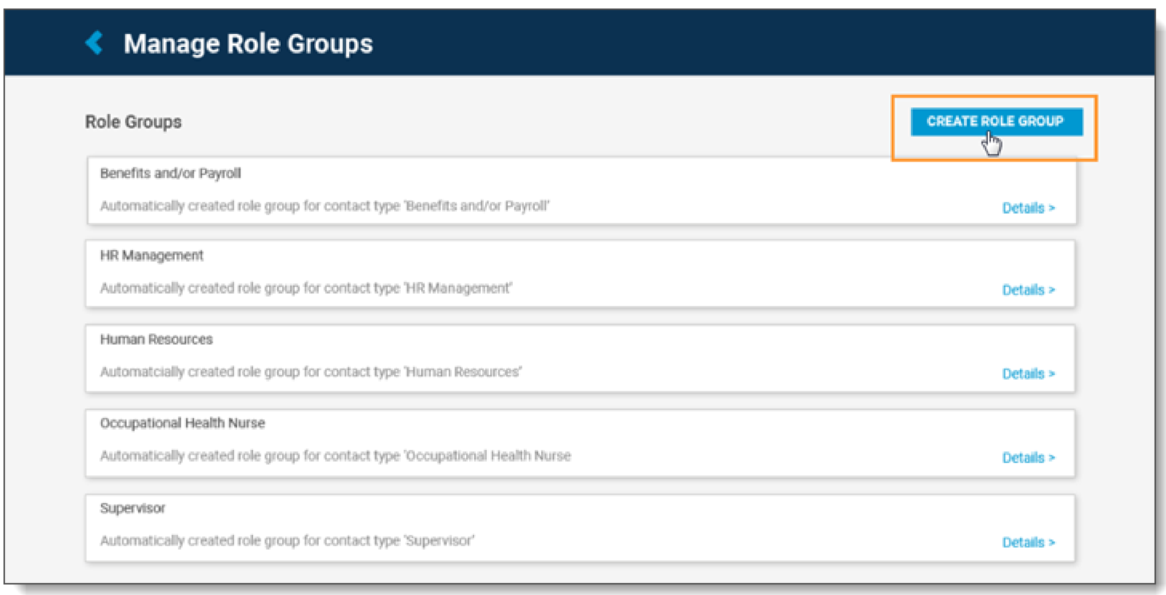
Role Groups allows you to create a "Super User" role. This super user role consists of multiple Self-Service roles packaged together into one unique role.

To create a Role Group:

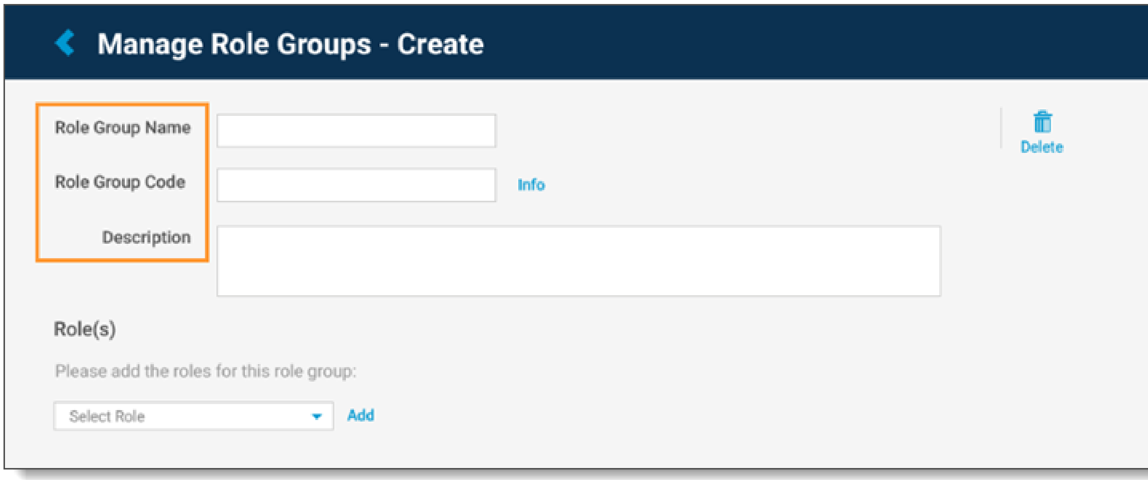
1. From the main Admin landing page, click **Manage** in the Role Groups section.



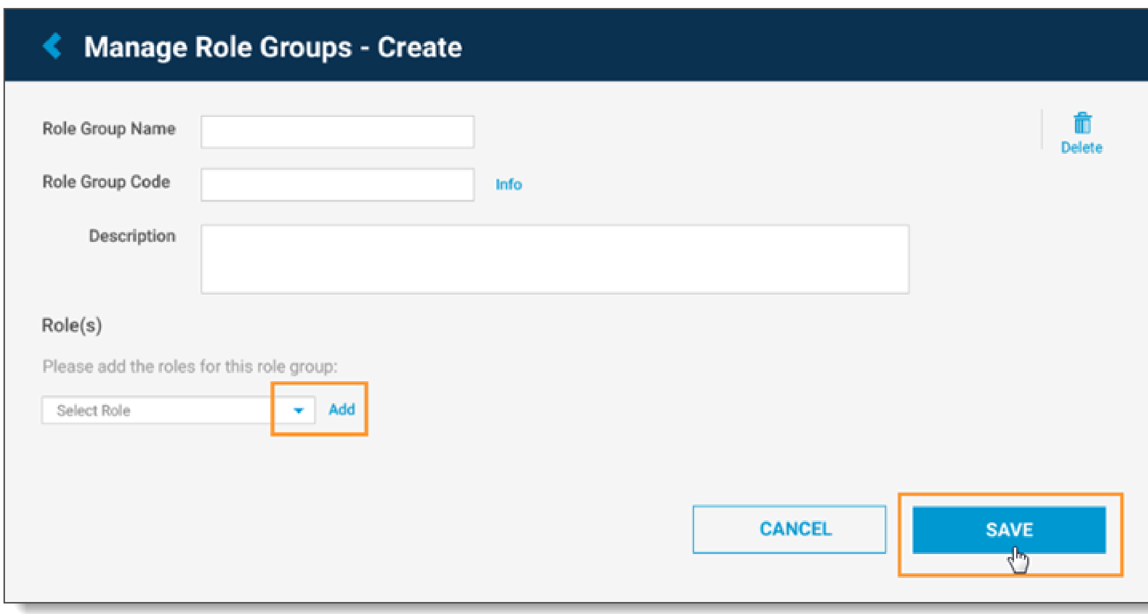
2. Click **Create Role Group**.



3. Create a **Role Group Name**, **Role Group Code**, and **Description**.



4. Add each role that will apply to the Role Group from the Role(s) drop-down box, the click **Save**.

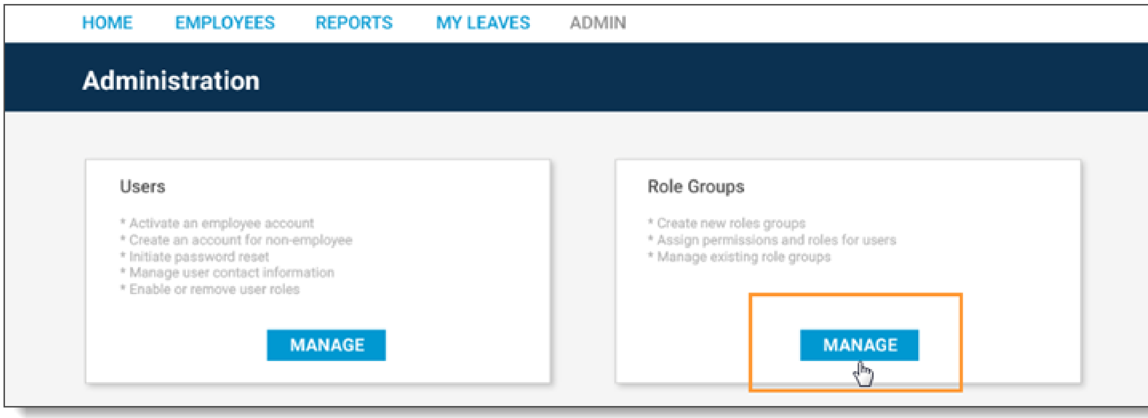


Editing Role Groups

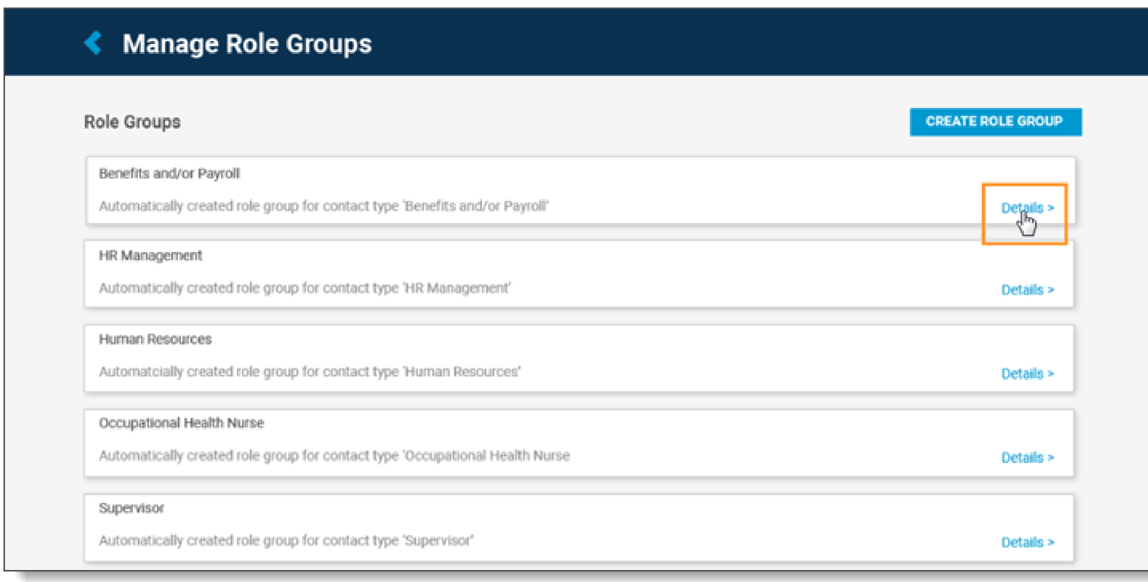
An admin user can adjust currently existing Role Groups.

To edit an existing Role Group:

1. From the main Admin landing page, click **Manage** in the Role Groups section.

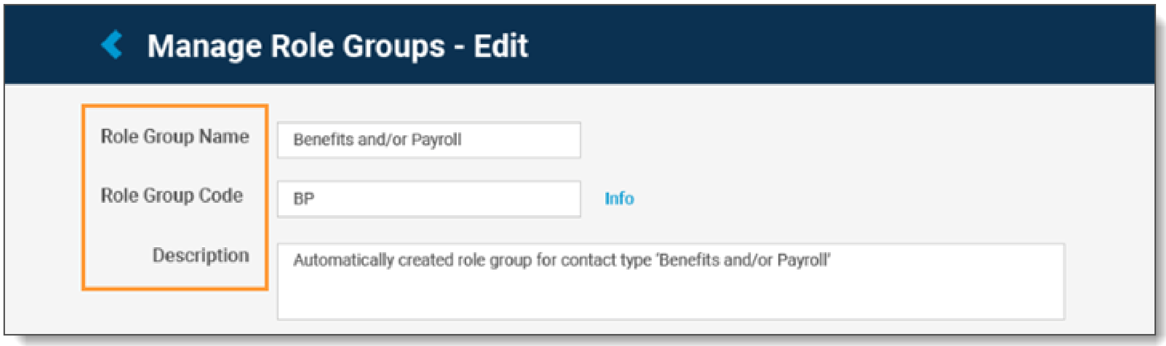


2. Click **Details** for the Role Group you want to edit.



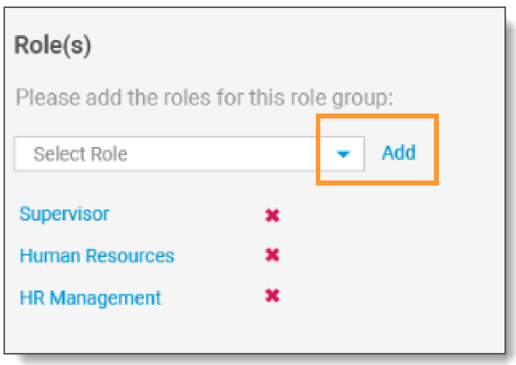
3. Adjust any of the available values:

- **Role Group Name**
- **Role Group Code**
- **Description**

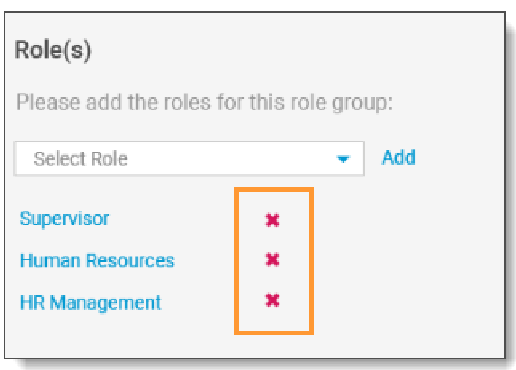


To add or remove Roles:

1. Select a role from the drop-down menu, and click **Add**.



2. Click the red **X** to the right of a role to remove it from the Role Group.



3. Click **Save** when finished.

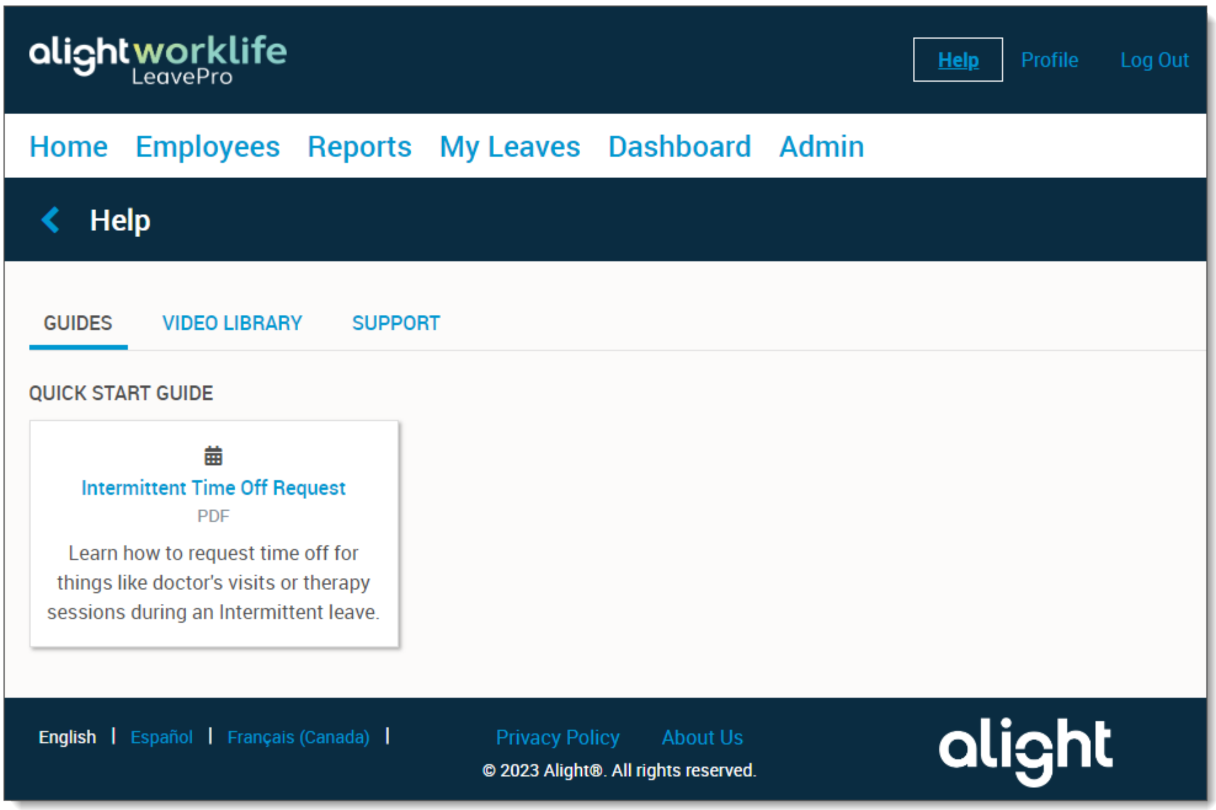
Help Section

The Help Section of LeavePro provides further information to assist you with certain features. You can also contact LeavePro support if you have additional questions.

To access the Help Section:

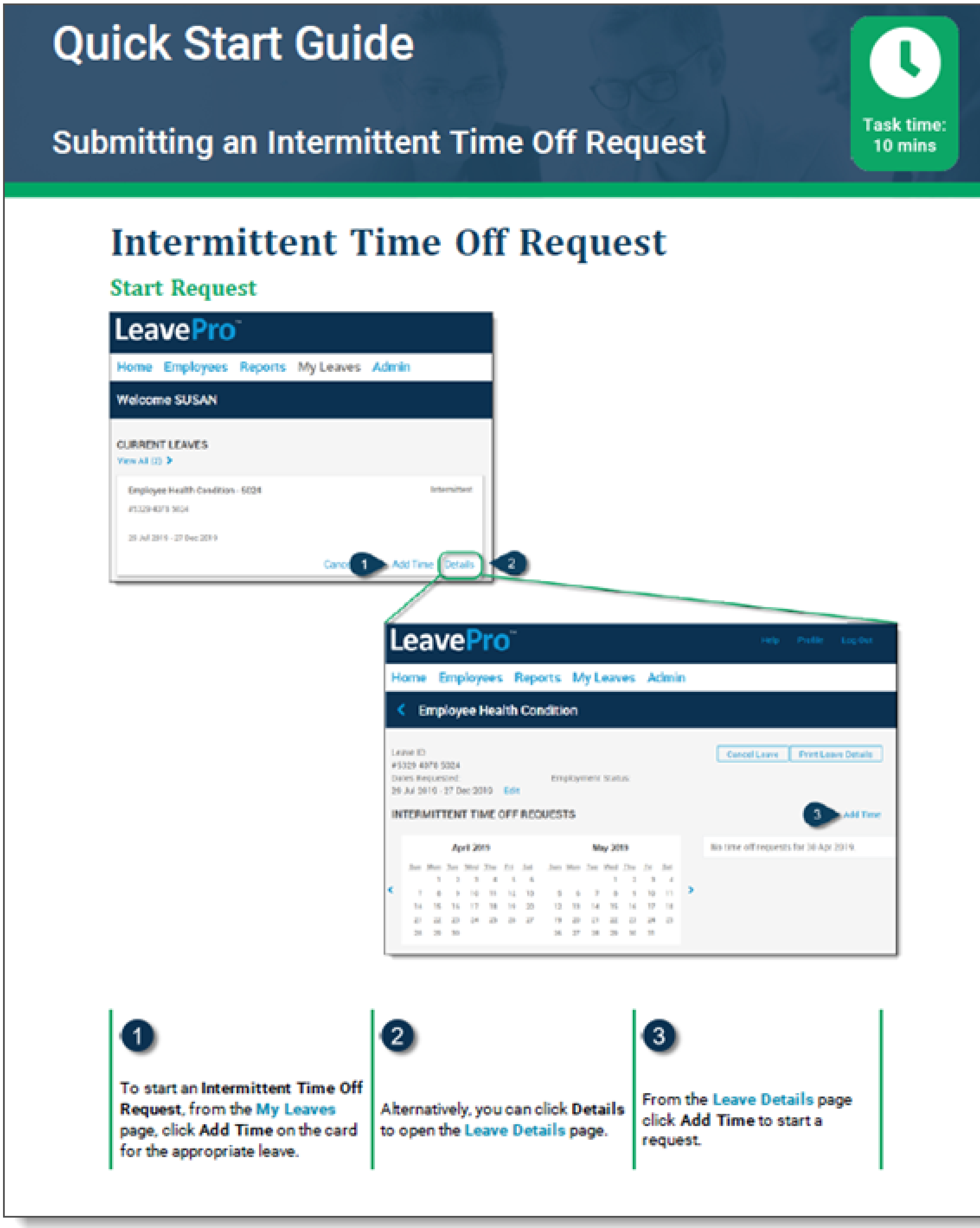
1. Click **Help** in the upper right of the LeavePro application.

   The **LeavePro Help Section** is displayed.



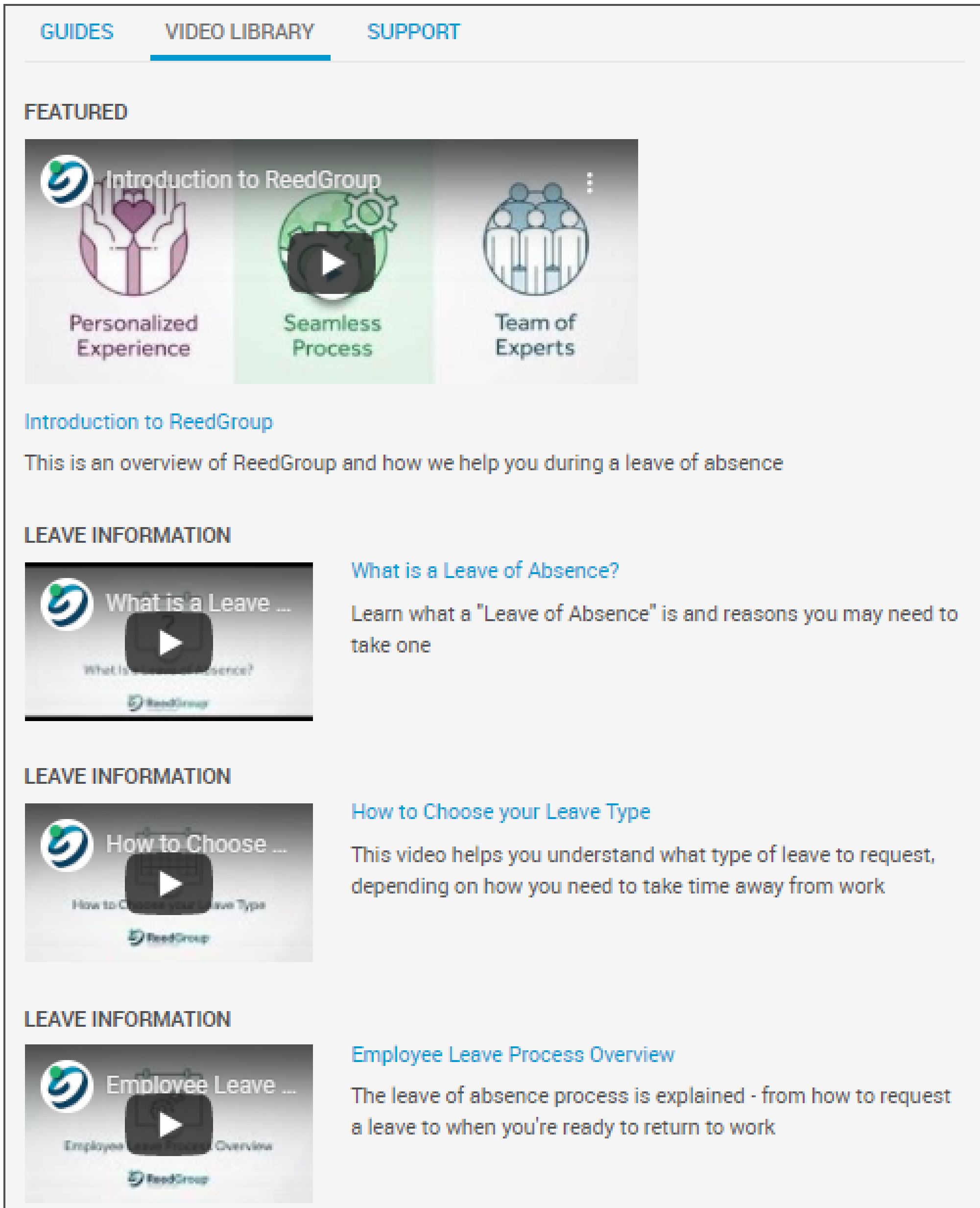
2. The **Guides** tab will display the **LeavePro Quick Start Guides**. These guides will help you with specific tasks within LeavePro.
3. Click the **Intermittent Time Off Request** guide to open it.

   The Intermittent Time Off Request pdf will open.



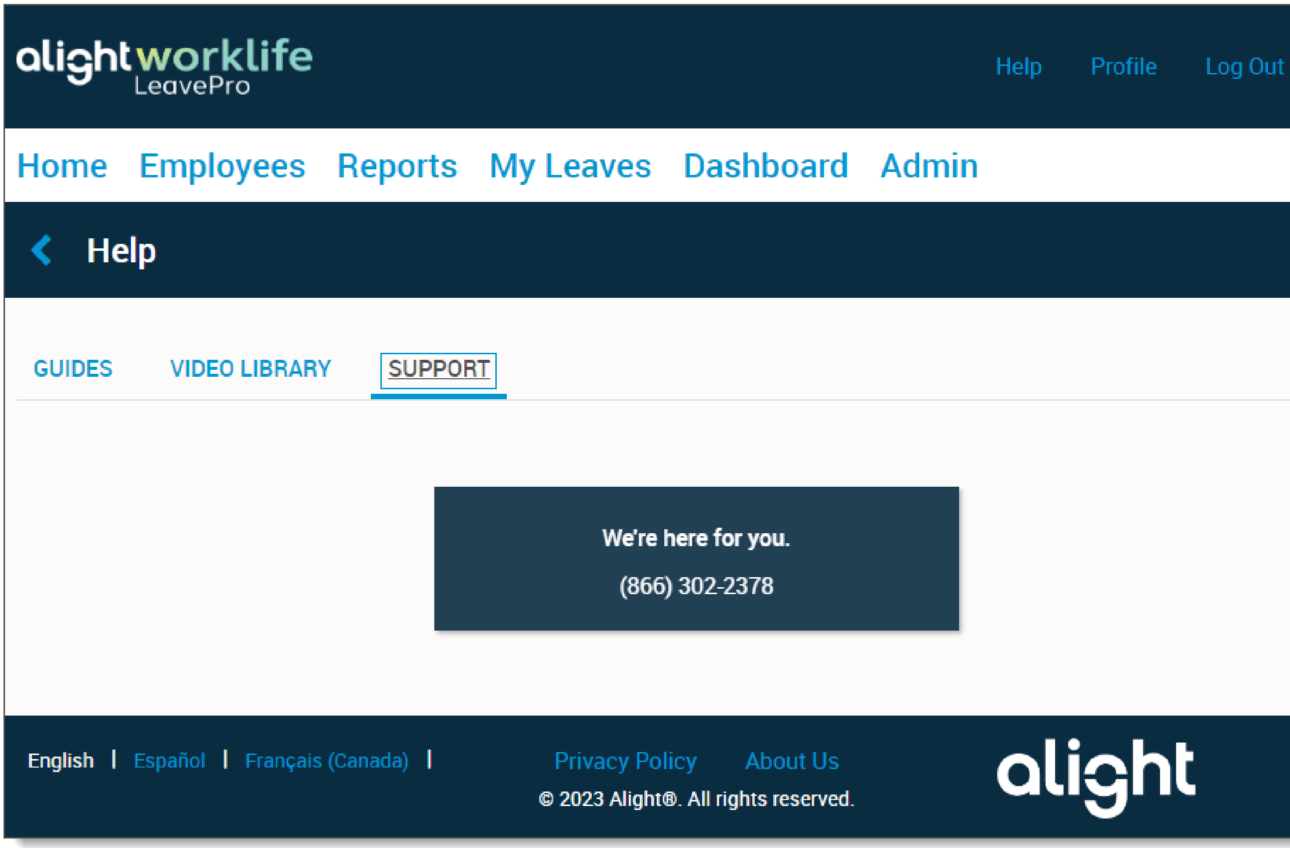
4. The **Video Library** tab will display help videos that contain important information about LeavePro and the Leave of Absence process. Click **Video Library**.

The **Video Library** tab is displayed.



5. The **Support** tab will provide contact information if you require additional assistance with LeavePro. Click **Support**.

   The **Support** tab is displayed.



6. This will display the LeavePro customer support number.

Revision History

Date	Description	Version	Revised By
November 21, 2017	Initial document release	1.0	Service Product
August 27, 2018	Updated with enhancements, including: • Ability to change leave start and/or end dates • Addition of Intermittent Time Off Reguest (ITOR) calendar and details • Ability to Add Company Paid Time Off • Addition of a Resources section containing client documents • Removal of Edge 3.0 as compatible Web browser	2.0	Service Product
January 18, 2019	Updated with addition of Print Leave Detail button and Leave Detail window	3.0	Service Product
February 18, 2019	Updated with addition of Cancel Leave feature	3.1	Service Product
February 18, 2019	Updated with addition of steps in workflow for Plan a Leave	3.2	Service Product
August 10, 2020	Full document rebrand and style changes Added Help section to document	4.0	Technical Communications
March 5, 2021	Added Multi-Factor Authentication and Single Source Log in	4.1	Technical Communications
April 9, 2021	Change to the new user registration process	4.2	Technical Communications
May 14, 2021	Added Support contact number to registration process	4.3	Technical Communications
August 5, 2022	Updating guide with new features,	5.0	Technical Communications

Date	Description	Version	Revised By
	including: • Admin role can see Note Information for the leave on the Print Details page • Added Upload Paperwork feature to the Leave Details Page • Added new info displayed on the Print Details page • Added the Manager Dashboard experience • Added note for the ability to configure the mailing address to be read-only • Employer can now search by Leave ID on the Employee tab • Added text message opt in to the registration process • Added multiple intermittent leaves display • Added Reduced Work Schedule view		
October 2, 2023	Updated the user guide to conform to Alight's branding standard.	5.1	Technical Communications