

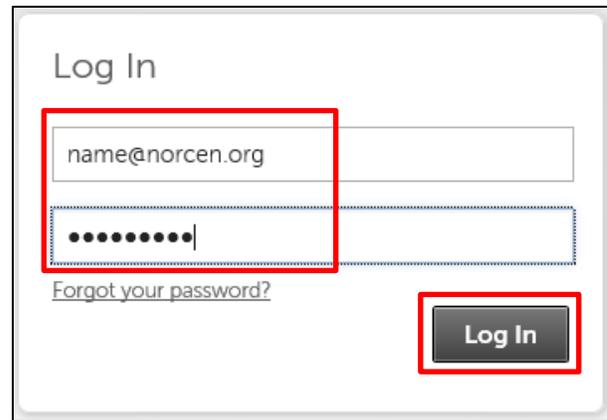
## UltiPro Job Aid – Paid Leave Time/Call Time Requests

Employees log into UltiPro to view available Paid Leave Time (PLT) accrual balance information. Employees may also submit, view, and edit PLT/call time requests.

### Log In to UltiPro

**Note:** IF this is your first time logging into UltiPro, please follow steps in [UltiPro Login Job Aid](#) first. [O:\Information Systems Libraries\UltiPro\NCHC\\_UltiProLogIn.pdf](#)

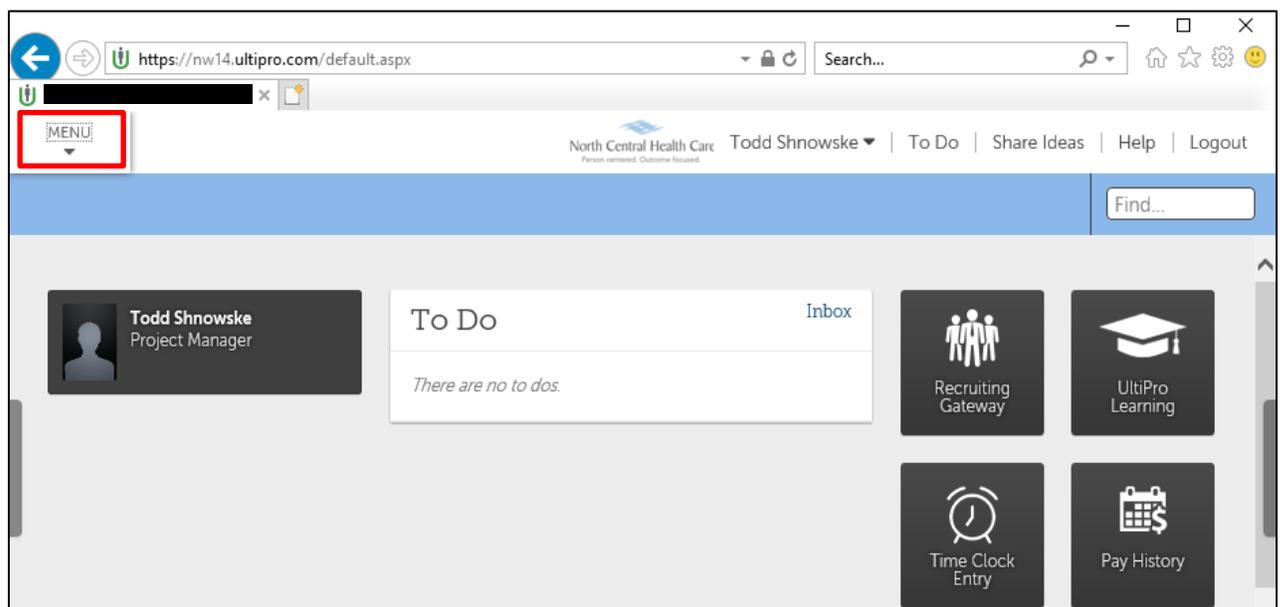
1. **Double-click** UltiPro desktop icon  .
2. When **UltiPro Log In** displays:
  - a. In **User Name**, type your North Central Health Care (**NCHC**) e-mail address (e.g. [name@norcen.org](#)).
  - b. In **Password**, type your password.
3. Click **Log In**. UltiPro Dashboard displays.



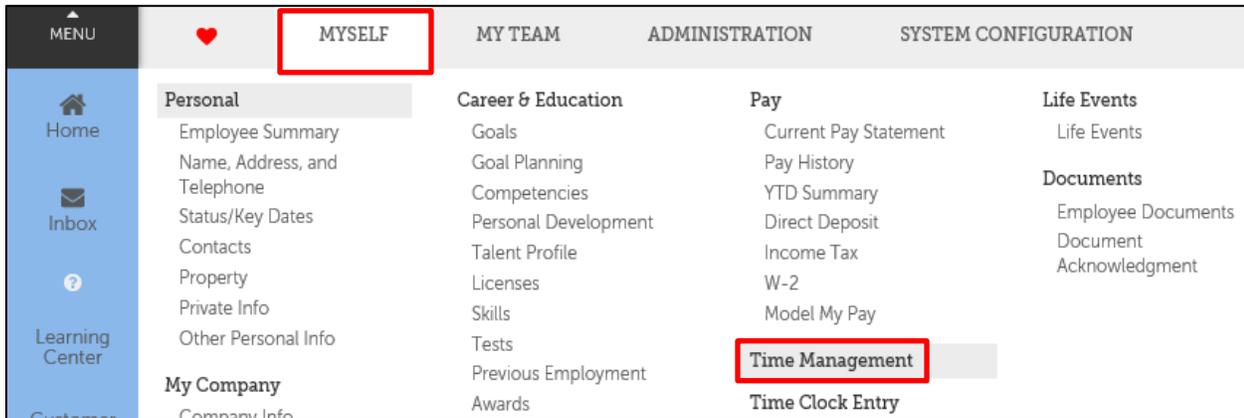
### Access Time-Off Requests

1. UltiPro Dashboard displays, click **MENU**.

**Note:** UltiPro menu options are security driven and individuals may configure dashboards by preference; **your UltiPro view may be different from screen shots in this document and other users.**



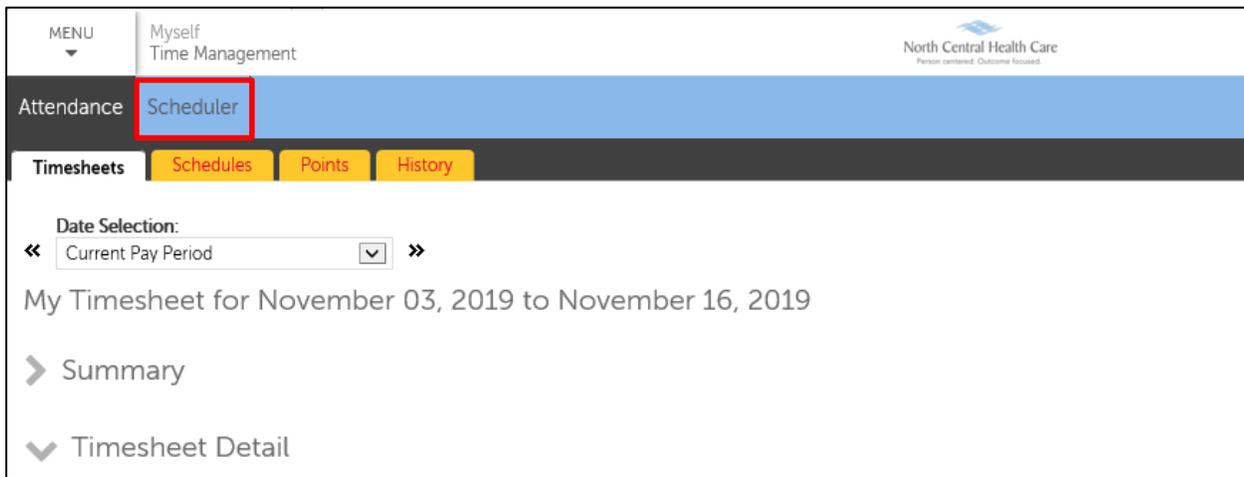
2. Click **MYSELF** tab.
3. Click **Time Management**.



The screenshot shows the UltiPro user dashboard. The 'MYSELF' tab is highlighted with a red box. Below it, the 'Time Management' option is also highlighted with a red box. The dashboard is organized into columns: Personal, Career & Education, Pay, Life Events, and Documents. The 'Time Management' option is located under the 'Pay' column.

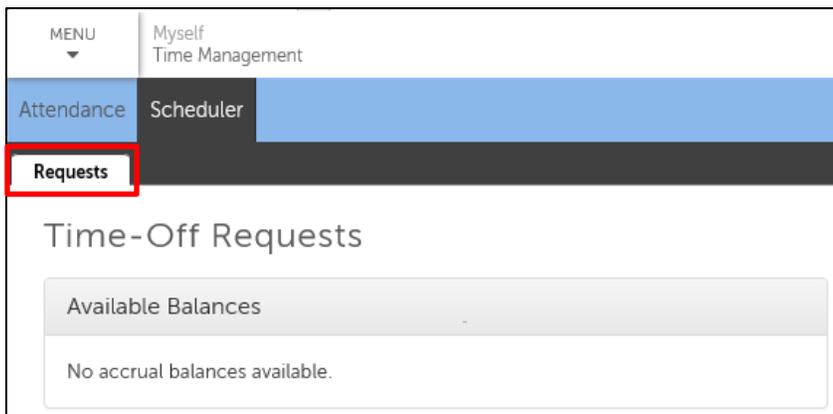
UltiPro **Time Management** page opens.

4. Click **Scheduler** category.



The screenshot shows the UltiPro Time Management Scheduler page. The 'Scheduler' category is highlighted with a red box. The page displays a date selection dropdown set to 'Current Pay Period' and a summary of the timesheet for November 03, 2019 to November 16, 2019. The 'Summary' and 'Timesheet Detail' options are visible.

5. Click **Requests** tab.



The screenshot shows the UltiPro Time Management Requests page. The 'Requests' tab is highlighted with a red box. The page displays the 'Time-Off Requests' section, which includes a table for 'Available Balances'. The table shows 'No accrual balances available.'

*Time-Off Requests* page displays. View available PLT accrual balance information and submitted Time-Off (e.g. PLT and Call Time) requests.

### **Enter a Time-Off Request**

1. Within **Time-Off Requests** page, click  **add**. **New Request** dialog displays.
2. In **Description** field, type the *description of the time off request*.
3. From **Type** drop-down list, select the *type of time off request (e.g. PLT and Call Time)*.
4. Click **From Calendar** to *select date on which time off request begins*.
5. Click **To Calendar** to *select date on which time off request ends*.
6. In **Notes** field, *type message regarding your time off request, which is visible to the approving manager/their designee*.

7. (Optional) To edit **Total** hours (e.g. from 8 to 4) OR **Type** (e.g. from PLT to Call Time), click **Show Advanced Options**.

- Click **Type** field and select **Type** from drop-down.
- Click **Hours** field and type **hours** into field.

The image shows three sequential screenshots of the 'Advanced Options' form. The first screenshot shows a table with columns: Date, Day, Type, Hours, Start, End, Available Hours, and Remaining Hours. A row is highlighted for 11/29/2019, FRI, PLT, 8.00, with Available Hours at 0 and Remaining Hours at -8.00. Red boxes highlight the 'Type' and 'Hours' cells. The second screenshot shows the 'Type' cell with a dropdown arrow, indicating it is being edited. The third screenshot shows the 'Hours' cell with '4.00' entered, indicating the total hours are being updated.

8. Click  **save**.

A Success confirmation message displays and an e-mail summarizing the time off request is automatically sent to the approving manager/their designee.

 **Success**

- Your new request was successfully saved and submitted. Click the + button to add additional requests.

*Time-Off Requests* page displays. View newly entered time off request (e.g. Request Status of Pending) and other time off information.

Attendance Scheduler

Requests

Time-Off Requests

Available Balances

No accrual balances available.

Find by: Request Status Is All  
Work Date From 01/01/2019 To 12/31/2019 Search

Displaying 1 to 2 of 2 record(s)

Action Edit Remind Cancel

Type	Description	Date Submitted	Hours	Request Status	Supervisor	Date Approved
<input checked="" type="radio"/>	PLT 11/29/2019 to 11/29/2019: One Day PLT Request	11/06/2019 08:49 AM	8.00	Pending		
<input type="radio"/>	PLT 09/26/2019 to 09/27/2019:	09/20/2019 11:15 AM	0.00	Canceled		09/20/2019 11:20 AM

Page Size: 10

### Edit a Time-Off Request

1. Within **Time-Off Requests** page, click **radio button** next to *time off* entry to modify.
2. Select **Action**:

Find by: Request Status Is All  
Work Date From 01/01/2019 To 12/31/2019 Search

Displaying 1 to 2 of 2 record(s)

Action Edit Remind Cancel

Type	Description	Date Submitted	Hours	Request Status	Supervisor	Date Approved
<input checked="" type="radio"/>	PLT 11/29/2019 to 11/29/2019: One Day PLT Request	11/06/2019 08:49 AM	8.00	Pending		
<input type="radio"/>	PLT 09/26/2019 to 09/27/2019:	09/20/2019 11:15 AM	0.00	Canceled		09/20/2019 11:20 AM

Page Size: 10

- Select **Edit** to VIEW **Edit Request** form with original submitted information.
- (Optional) Within **Advance Options** pane, edit **Total** hours (e.g. from 8 to 4) OR **Type** (e.g. PLT or Call Time).
  - Click **Type** field and select **Type** from drop-down.
  - Click **Hours** field and type **hours** into field.
  - Click **Save**.
- To return to Time-Off requests page without saving, click **Cancel** and click **OK**.

The screenshot shows the 'Edit Request' form. The 'Advanced Options' section is highlighted with a red box and contains the following table:

	Date	Day	Type	Hours	Start	End	Status	Available Hours	Remaining Hours
x	11/29/2019	Fri	PLT	8.00			Pending	0	-8.00

- Select **Remind** to type a message in the **Reminder Message** pop-up window. Click **Remind** to send reminder message to your supervisor/approver.

The screenshot shows the 'Reminder Message (optional)' pop-up window. The text input field contains the following message:

Hello Supervisor. I need to purchase airline tickets by Friday. Can you please approve my PLT request? Thank you!

- Select **Cancel** to type a message in the **Cancel Message** pop-up window. Click **Cancel Request** to send cancellation message to your supervisor/approver.

Cancel Message (optional) Cancel Request

Hello Supervisor. Sorry, but plans with my family changed and I no longer need to take this as a PLT day. I am able to work. Thank you!

\*Note: PTO cancellations do not remove events, such as meetings, from your personal and/or shared Outlook calendars. To keep your calendar(s) current, please manually delete the applicable meeting(s).

Time-Off Requests page displays.

Type	Description	Date Submitted	Hours	Request Status	Supervisor	Date Approved
○ PLT	11/29/2019 to 11/29/2019: PLT Request	11/10/2019 04:12 PM	8.00	Pending		
○ PLT	11/29/2019 to 11/29/2019: One Day PLT Request	11/06/2019 08:49 AM	0.00	Removed		
○ PLT	09/26/2019 to 09/27/2019:	09/20/2019 11:15 AM	0.00	Canceled		09/20/2019 11:20 AM

## Log Out of UltiPro

1. Click **Logout**.

2. Click **X** in upper right corner of window to close web browser.

## Get Help

- **View Help Documentation**
  - » Available from **Help** link when signed into UltiPro
- **View Quick Tours and Tips**
  - » Available in Quick Tours and Tips links section of application tab set when signed into UltiPro
- **Send e-mail to NCHC - Human Resources**
  - » [HResources@nrcen.org](mailto:HResources@nrcen.org)
- **Speak with Human Resources Staff**
  - » 715-848-4419 or ext. 4419