Employee - Add / Edit Accrued Time Off Entry (FI Mode Only)

Description: In this topic, the user will learn how to add and edit an Accrued Time Off entry in the web portal. The accrued time off entry feature allows employees to claim paid time off against an hourly authorization if the client is authorized to pay employees for time off.

*Please note:

- Accrued Time Off is an instance-level setting that may not be available to all organizations/employees
- Entered via web portal or mobile web only (not mobile app)

Role Required: Employee (base user)

Permission Required: N/A

FI Mode Only

Add an Accrued Time Off Entry

1. Log in to web portal
2. Click the blue **Add Entry** button on the dashboard
3. Complete the **Add New Entry** form wizard
    a. Entry Type: Punch is the Default. Select Accrued Time Off from the drop-down.
        i. Please note: This option may not be available for all organizations/employees
    b. Employee Name: Auto-populates the name of the employee logged in
    c. Account Type: Hourly
    d. Client: Type and select the client from the list who is authorizing the paid time off
    e. Service Code: The service code(s) authorized for the client to pay employee time off
    f. Service Date: The date the accrued time off was taken
    g. Amount: The amount of accrued time off used, entered as up to two whole integers and up to two decimal places (i.e., 10.25).
    h. Notes (optional): Enter notes per organizational requirements
    i. Attachment (optional): Click the **Choose File** button to add an attachment
4. Click **Save** and **Yes** to confirm

Edit an Accrued Time Off Entry

1. Log in to web portal
2. Click **Home** on the main menu
3. Click **Entries** on the submenu
4. Click anywhere on the entry line
5. Click **Actions**
6. Select **Edit Entry** from the drop-down menu
7. Edit fields as needed in the Edit Entry form wizard
8. Click **Save** and **Yes** to confirm

The original punch status changes to Rejected. A new punch with the updates is generated in Pending status and will have a Ref. Entry # listed linking it to the original, edited punch. To view the original and new punch, select **Entries** on the submenu.

Related articles

- May 2024 Release Notes
- What is the DCI Mobile Web?
- Enter a Punch - Web Portal
- What devices, operating systems (OS), and web browsers does DCI support?
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