KAISER PERMANENTE®

NAI—Time Off Request Tracking

Approver User Documentation

Contents

TORT basics

Accessing TORT

To access TORT:

1. Begin on My HR: insidekp.kp.org/myhr

2. Click **Sign on** and sign on using your KP single sign-on. See *KP single sign-on* later in this job aid for detailed steps.

3. Click the **Manager Tools** tab.

4. Click Time Off Requests (TORT).

Note: Please use Internet Explorer or Google Chrome to use the TORT application.

KP single sign-on

Your KP single sign-on provides secure and convenient access to many KP applications. With your NUID and a single password, you can sign on to the following applications:

- Time Off Request Tracking (TORT)
- My HR
- KP Learn
- Many others

All of these applications automatically redirect you to the single sign-on to provide secure access after entering your NUID and password.

If you do not have a single sign-on account, click the **Activate your account** link and follow the prompts. Use the links under Manage your account if you forget your password, to change your password, or for password reset questions. Direct questions about this sign-on process to your local help desk.

Signing on

Type your NUID in the National User ID (NUID) field.

Type your single sign-on password in the Password field.

Click the **Sign on** button.
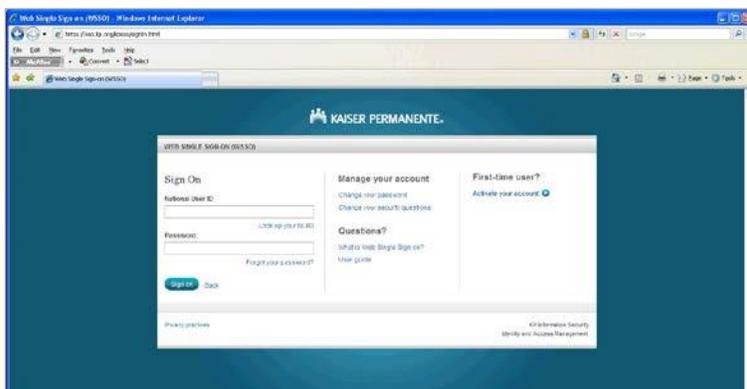
Single sign-on provides secure access to Kaiser Permanente applications.

Important: Do not bookmark (add as a favorite) the single sign-on page. Instead, bookmark each application that uses the single sign-on. Wait until after signing on and accessing the TORT application, and then add that page as a favorite. When you access that bookmark later, the single sign-on page displays, then opens to the TORT application.

Note: Two distinct TORT web addresses are used: one, to request time off and the other, to process requests. Approvers who use both must clearly label favorites/bookmarks to distinguish between the two.

Note: After 30 minutes of inactivity, users must reenter their NUID and single sign-on password to continue working. Unsaved work may be lost, so save often.

Signing off

To sign off, click **Sign off** at the very top of the screen. Signing off is good security practice, and it prevents people from inadvertently requesting time off using your account instead of their own.
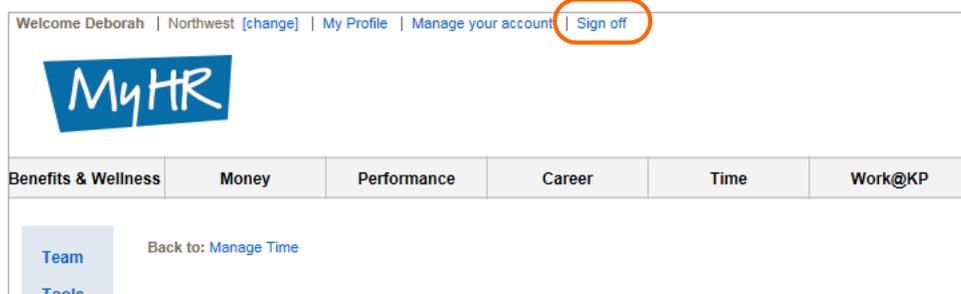
Introduction to TORT

Time Off Request Tracking (TORT) is Kaiser Permanente's tool for requesting, processing, tracking, and reporting vacation (PTO - paid time off / ETO - earned time off), vacation bidding, float, flexible personal days (life balance days), birthday holidays, and other types of time off (which include jury duty, union business, bereavement leave, training/meetings, education time, doctor appointments, unpaid time, and LMP time). Authorized approvers receive requests for time off from members of their approval group, which they then process (approve, deny, return, or place on hold).

The process for requesting and/or tracking sick time, leaves of absence, and other regulated leaves remains unchanged.

Requesting time off

Using TORT, users can check their current vacation (PTO/ETO) and flexible personal day balances, request time off, and receive email notifications when requested time off is processed. Approved and pending time-off requests are listed, along with the current status of each request. Past time-off requests are listed on the Time Off Request History tab.

Approving time off

Authorized approvers use TORT to review and process (approve, deny, place on hold, or return) requests for time off from employees in their approval group.

Authorized approvers are notified twice a day by email when members of their approval group submit a request. Authorized approvers are also notified of the need to approve or deny employee-requested retractions of approved time-off requests.

Note: TORT does not change any existing contractual provisions or Kaiser Permanente policies. These benefits vary widely across the organization. Always follow existing policies when processing time off.

Process overview

Employee submits request

Employees submit time-off requests to authorized approvers who process (approve, deny, place on hold, or return) the requests.

Note: Only active KP employees on the My HR system can use TORT. Contractors and temporary employees cannot use TORT.

Approver processes request

When an employee submits a request, it is sent to the employee's authorized approver. The authorized approver is either the person who is authorized to approve time-off requests or a designated proxy. When the authorized approver or proxy approves the request, the employee can then take the time off. Approvers may also put a request on hold before taking any further action, or they may return or deny a request.

Note: Only active KP approvers on the My HR system can use TORT. If the primary approver has an inactive status (due to a transfer, retirement, having left KP), both employees and approver proxies within their approval group cannot use the TORT system until a new primary approver is set up in TIME.

Primary approver

The primary approver in TORT is always a reflection of the primary approver set up in the TIME system.

Approver proxy

In some cases, an approver proxy can be designated to process time-off requests in addition to the primary approver.

Saving a draft request

When an employee creates a new time-off request, he or she can submit it immediately or save it as a draft. When a request is saved as a draft, it is not forwarded to the approver, and the hours are not subtracted from the employee's available balances. Later, the employee can choose to edit and submit the request, or delete it.

Note: If the end date of the request passes and the employee has not taken any action on the draft, the system deletes the draft.

Withdrawing a request

After the employee submits a time-off request, he or she can withdraw it if an authorized approver has not yet approved or denied it. Submitting a request for time off subtracts the time from the employee's available balance in TORT. If the request is withdrawn or denied, the time is added back to the employee's available balances.

Note: If the authorized approver places a request on hold, the employee can still withdraw it.

Retracting a request

After a time-off request is approved, the employee cannot delete or withdraw it, but he or she can retract it. Retraction of a time-off request requires the same approval as the original request. When the authorized approver approves the retraction, the time off is cancelled. If the retraction is denied or not processed, the request remains approved.

Note: The employee can also partially retract day(s) within his or her time-off request.

Resubmitting a returned request

When it is appropriate, an approver can return a request to the employee without approving or denying it, and suggest that the employee make changes to the date(s) or time(s) of the request. The employee can then do one of the following:

- Withdraw the request.
- Resubmit the request as is.
- Edit and resubmit the request.

Note: If the employee decides to edit and resubmit the request, the system retains the original date and time of the request so that the employee does not lose his or her place in the request queue.

Approver override

If the approver previously denied the request, using the override allows the approver to change the status from Denied to Approved.

Once the approval (override) is made, the approver cannot take any further action on the request unless the requestor retracts the request. In the case of an approved (overridden) request, the requestor receives an email notification and an alert is displayed in the Alerts portlet.

Note: The approver can also override a denied retraction request and change it to approved.

Time-off request statuses

Time-off requests change status as they are processed.

Status	Detail	Description
Draft	Draft Saved by Employee	The time-off request is saved, but not submitted. Drafts can be deleted or edited and submitted. If the draft is not submitted by the end date of the request, it is deleted by the system.
Submitted	Pending Action by Approver	The time-off request is submitted, but not yet approved or denied by the approver.
Withdrawn	Removed by Employee	The time-off request is submitted, not yet approved or denied, and withdrawn by the employee.
On Hold	Placed on Hold by Approver/System	A time-off request has been placed on hold by the authorized approver, or a vacation bid request has been automatically placed on hold by the system. After the end date of the hold, the approver must approve, deny, or return the request, or place a new hold. If the approver does not take action before the end date of the hold, the system releases the hold. Holds cannot be placed within the 15-day period before the first day of the time-off request.
Approved	Processed by Approver	Time off is approved.
Approved	Denied Overridden to Approved	A time-off request that was previously denied is approved.
Approved	Reapproved (Retraction Denied)	Retraction was requested by the employee and denied by the authorized approver. This includes partial-retraction requests.
Approved	Approved Days of a partially approved request	A time-off request is approved for specific days within a partially approved request.
Denied	Processed by Approver	Time off is not approved.
Denied	Denied Days of a partially approved request	A time-off request is denied for specific days within a partially denied request.
Submitted	Recalled (Retraction Requested)	A retraction was requested by the employee, but not yet processed. This includes partial-retraction requests.
Retracted	Removed (Retraction Approved)	A retraction was requested by the employee and approved by the authorized approver. This includes partial-retraction requests.
Returned	Approver Requests Resubmit	The time-off request is returned by the approver without being approved or denied, but with suggested changes to the date(s) or time(s) of the request. The employee can resubmit the request with or without making the suggested changes, or withdraw the request.
Resubmitted	Changes made to Resubmitted Request Resubmitted without changes	The request returned by the approver has been resubmitted by the employee. The text in the Detail column indicates whether the employee made changes to the returned request before resubmitting it.

Email notifications

Employee notifications

Employees receive email notification of the following:

- Approval or denial of time-off requests
- Partial approval or denial of time-off requests
- Approval or denial of retractions of time-off requests
- Future requests for flexible personal days and float that exceed the available time-off balance
- Returned requests
- Approved (overridden) requests

Approver notifications

Authorized approvers receive email notification of the following:

- Requests for time off from members of their approval group
- Requests for retraction of time-off requests from members of their approval group
- Withdrawal of requests that the approver has placed on hold
- Approved (overridden) requests

Types of time off and policies

TORT does not change any of the time-off benefits employees enjoy under union contracts or Kaiser Permanente policies. These benefits vary widely across the organization. Always follow existing policies when requesting and processing time off.

TORT approver interface

The link for processing time-off requests is on the Manager Tools tab in My HR.

This is an example of the Approver Time Off Detail for a selected time-off request. Scroll down to see the whole page.

Approver Time Off Detail

Process a Time Off Request

*Required
*Request Status

- ○ Approved
- ○ Denied
- ○ Hold
- ○ Returned
- ○ Partially Approved / Denied

Approver Comments:
Enter Comments (Optional)

| Submit | Cancel |

Time Off Request for: fname Elaine Iname (I309774)   Time Off Request ID:
                                                                                              21418828

Submitted On: 08/11/16 11:45 AM GMT-07:00   Submitted By: fname Elaine Iname

Employee Comments:
 Anniversary celebration

Time Off Request Type	Current Balance	Available Balance	Future Approved Hours	Hours in this Request
Vacation (PTO/ETO)*	900.00	836.00	0.00	32.00
Vacation Bidding		included above	0.00	0.00
Float	NA	NA	0.00	0.00
Other-Jury Duty			0.00	0.00
Other-Union Business			0.00	0.00
Other-Bereavement Leave			0.00	0.00
Other-Training/Meetings			0.00	0.00
Other-Education Time			0.00	0.00
Other-Doctors Appointment			0.00	0.00
Other-Unpaid Time			0.00	0.00
Other-LMP Time			0.00	0.00
Flexible Personal Days	900.00	900.00	0.00	0.00
Total	1800.00	1736.00	0.00	32.00

Current Request - Time Off Request Type	Date	Day	Times	Requested Hours	Approved Days/Hours
Vacation (PTO/ETO)	09/26/2016	Monday	Full Day	8.00	✓
Vacation (PTO/ETO)	09/27/2016	Tuesday	Full Day	8.00	✓
Vacation (PTO/ETO)	09/28/2016	Wednesday	Full Day	8.00	✓
Vacation (PTO/ETO)	09/29/2016	Thursday	Full Day	8.00	✓
Total				32.00	32.00

2016
◄ September ►

S	M	T	W	T	F	S
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Select a time off calendar entry to view request details.

Employee Details

Employee (NUID)
fname Elaine Iname (I309774)

Preferred e-mail Address
x.y@kp.org

Authorized Approver

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The top of the screen that a typical authorized approver sees for TORT looks like this.

Time-off requests

Incoming Time Off Requests: This tab displays requests from employees in an approval group.

Time Off Request History: This tab displays the time-off request history for the current year and previous year.

Portlets

Approver Alerts: This portlet indicates the number and type of requests for review.

Approver Time Off Detail: When an approver selects a request to review, the section in the center of the screen displays a summary of the request and its history. This is the section where the approver processes the request. Because of the length of the forms, it is often necessary to scroll down to see all of the available information.

Where to go for more help

The **Do It Now** portlet at the bottom right of the TORT screen provides links and additional information on ways to get help using TORT.

Approver Proxy Add/Remove Form: This link opens a document that primary approvers can complete to add or remove TORT approver proxies.

Float Employee Add/Remove Form: This link opens a document that approvers can complete to allow float employees access to view additional approval groups in the Calendar Week View.

My Time Off Requests: This link directs the Approver to their personal TORT employee profile

Review Time Off Policies: This link opens a document with information on time-off policies.

Time Off Approver Job Aid: This link opens the PDF file for this job aid.

Take TORT Training: This link goes directly to KP Learn where a helpful, interactive TORT training program is available.

How to find TORT Training: This link opens a document that provides step-by-step instructions on how to find TORT training on KP Learn.

Loading Issue? View Fix: This link provides instructions on how to change the computer loading settings to fix the prolonged loading, spinning issue users see when processing time-off requests.

Spanish Materials: This link opens a document that has the TORT job aid and FAQs translated into Spanish.

Questions? View FAQs: This link opens a document that lists the answers to frequently asked questions.

TORT SharePoint Site: This link directs you to important TORT reporting, communications, and training materials.

NAT-TORT@kp.org: Send an email to this address if questions, feedback, or suggestions arise.

Super User Contact List: This link appears only for users in the SCAL Region; it opens a document listing expert TORT users in the Southern California Region to contact with TORT questions.

Viewing requests

Sorting time-off requests

Time-off requests are listed on the Incoming Time Off Requests tab.

1. To re-sort the requests, click the Employee (NUID), Date(s) Requested, Time Off Request Type, Status, Date Submitted, Details, Shift, Union Seniority, Alternate Seniority, or Rank column header.

Incoming Time Off Requests (11)	Time Off Request History									
Employee (NUID) ▲	**Date(s) Requested**	**Hours Requested**	**Time Off Request Type**	**Status**	**Date Submitted**	**Details**	**Shift**	**Union Seniority**	**Alternate Seniority**	**Rank**
Otter, Ugliest S (K208892)	06/23/2017-06/24/2017	22.00	Multiple (Combined)	Submitted	05/16/2017 01:12:08 AM GMT-07:00	Recalled (Retraction Requested)	1 - Day	NA	NA	NA
Otter, Ugliest S (K208892)	06/28/2017	10.00	Vacation (PTO/ETO)	Submitted	06/21/2017 03:00:45 AM GMT-07:00	Days Recalled (Partial Retraction Requested)	1 - Day	NA	NA	NA
Otter, Ugliest S (K208892)	07/03/2017	10.00	Float	Submitted	06/21/2017 03:34:01 AM GMT-07:00	Days Recalled (Partial Retraction Requested)	1 - Day	NA	NA	NA
Otter, Ugliest S (K208892)	07/27/2017	10.00	Vacation Bidding	Submitted	06/21/2017 06:30:21 AM GMT-07:00	Days Recalled (Partial Retraction Requested)	1 - Day	NA	NA	1
Otter, Ugliest S (K208892)	08/03/2017	3.00	Vacation (PTO/ETO)	Submitted	06/19/2017 02:29:20 PM GMT-07:00	Days Recalled (Partial Retraction Requested)	1 - Day	NA	NA	NA
Otter, Ugliest S (K208892)	06/26/2017	10.00	Vacation (PTO/ETO)	Submitted	06/21/2017 02:32:54 AM GMT-07:00	Days Recalled (Partial Retraction Requested)	1 - Day	NA	NA	NA
Otter, Ugliest S (K208892)	07/09/2017	10.00	Other	Submitted	06/21/2017 04:15:34 AM GMT-07:00	Days Recalled (Partial Retraction Requested)	1 - Day	NA	NA	NA
			Flexible Personal		06/21/2017	Days Recalled				

List View | Calendar Week View   Show All Requests | Filter Requests
Filters Applied: Status, Request Type

Export File   Printable Version

(P) Request Contains one or more Partial Days.

The requests are sorted in ascending order of the values in the selected column.

Click the column header again to sort in descending order.

Viewing time-off requests for specific dates

Time-off requests are initially displayed on the Incoming Time Off Requests list in chronological order by start date of the request. To show only requests for time off during a specific period, filter by date range.

1. Click **Filter Requests**.

The Filter window displays.

Select the **Date Range** option.

Click the **Start Date** (mm/dd/yyyy) field.

The current month's calendar displays.

Use the calendar controls to select the first date in the range.

Click the **End Date** (mm/dd/yyyy) field.

   The current month's calendar displays.

Use the calendar controls to select the last date in the range.

Click **Submit**. (Scroll down to see the button if necessary.)

Requests and retractions within the specified date range are shown.

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Note: Filtering can be done using other criteria, or a combination of criteria. You can select values for multiple fields (Department, Union Affiliation, Approver/Approval Group, and Job Code-Description) by pressing the CTRL key when making selections.

To do this…	Follow these instructions…
View a specific department	Select the department from the Department list box.
View a specific union affiliation	Select the union from the Union Affiliation list box.
View a specific approver or approval group	Select the approver or approval group from the Approver/Approval Group list box.
View a specific job code	Select the job code from the Job Code-Description list box.
View a specific request status	Select the check box corresponding to the request status.
View a specific request type	Select the check box corresponding to the request type.

Exporting the List View

You can export the List View to an Excel spreadsheet, where data can be sorted and organized, printed, or saved. You can also export the History tab to Excel.

Create an Excel spreadsheet

1. Choose the results to export. The default display of the List View contains submitted, resubmitted, and retraction submitted requests. Click the **Show All Requests** or **Filter Requests** links to filter and display a different set of results.

Click **Export File**.

A dialog box opens with choices to open or save the file. It is best to first open the file, then save it to your computer in Excel format after making your changes.

Click **Open** in the File Download dialog box.

The contents of the List View are displayed in a spreadsheet. If a filter was applied to the view before generating the file, the filtered results are exported.

Viewing time-off requests by calendar week

To view all requests for time off in a selected week, use the Calendar Week View link.

Accessing and navigating the Calendar Week View

1. Click **Calendar Week View**.

Click the **<** (back) or **>** (forward) links to scroll to previous or future weeks, or select a date from the calendar in the Start Date (mm/dd/yyyy) field, and click **Go**.

Viewing past and future requests

Time off requests that has passed can be viewed back to the first week of the previous year. Request dates in the past cannot be edited and are dimmed in Calendar Week View; they only appear if the request contains current or future dates.

Calendar Week View description

Default start week

When the Calendar Week View displays, the first week begins on the Sunday after the current date.

Columns and rows

Each day of the week appears as a column in the selected week. The requestor's name is shown in the Name column at the left of the view for each request. If the requestor has multiple requests for individual days in the displayed week, a separate row is shown for each request.

Color-coded requests

The Calendar Week View shows submitted, on hold, returned, and approved requests for the selected week. Each time-off request is represented by a colored bar that extends through each day of the request. There is a legend at the top of the calendar that describes the color associated with each type of request.

Types of requests not displayed

Retracted requests, withdrawn requests, and denied requests are not shown in the Calendar Week View.

Sort order

Requests are sorted by the requestor's last name.

Weeks with no requests

If there are no time-off requests for the selected week, the message "No Incoming Time Off Requests." displays.

Partial-day requests

Requests for partial days show the start and end times of the request on the colored bar.

Viewing request dates

To view the start date and end date of a request along with the requestor name, hover the pointer over the request.

The request information is displayed.

Selecting requests to view or process

To see details about a request or to process it, select it by clicking anywhere on the bar representing the request in the Calendar Week View.
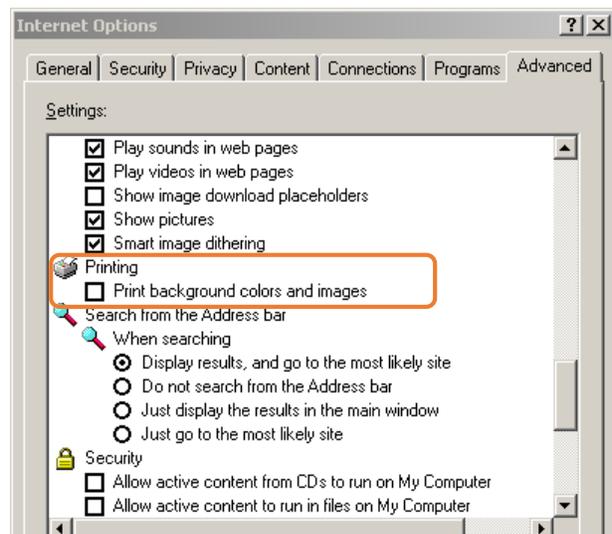
Printing the Calendar Week View

Set browser printing options

Before printing the Calendar Week View for the first time, some computers require the user to set the browser to print background images and colors. This setting is recommended even when printing to a black-and-white printer. This setting allows the shaded bars that appear on each day of each request to print. On a black-and-white printer, this setting prints the bars in shades of gray. On colored printers, this setting prints the bars in color. When this setting is not selected, the letter corresponding to the status of the request (Submitted, Approved, Hold) is printed on each day of the request.

Setting printing options in Internet Explorer

Begin on the menu bar of Internet Explorer with the TORT application open.

1. Select **Tools**, then **Internet Options**.

2. Click the **Advanced** tab.

3. Scroll down to view the Printing section, and select the **Print background colors and images** check box.

4. Click **OK**.

Printing a calendar week

2. Click the **Printable version** button in the upper right of the Calendar Week View.

A new window with a view of the calendar week displays.

Click the **Print** link in the upper left of the new window.

Follow the normal process for printing.

Viewing time-off request details

- To select a request from the List View, click the date(s) of the request.

Employee (NUID)	Date(s) Requested	Hours Requested	Time Off Request Type	Status	Date Submitted	Details	Shift	Union Seniority	Alternate Seniority	Rank
Otter, Ugliest S (K208892)	08/06/2017	6.00	Vacation (PTO/ETO)	Approved	06/19/2017 03:10:41 PM GMT-07:00	Approved Days of a partially retracted request	1 - Day	NA	NA	NA
Otter, Ugliest S (K208892)	06/27/2017	10.00	Vacation (PTO/ETO)	Approved	06/21/2017 03:00:45 AM GMT-07:00	Approved Days of a partially retracted request	1 - Day	NA	NA	NA
Otter, Ugliest S (K208892)	06/28/2017	10.00	Vacation (PTO/ETO)	Submitted	06/21/2017 03:00:45 AM GMT-07:00	Days Recalled (Partial Retraction Requested)	1 - Day	NA	NA	NA
Otter, Ugliest S (K208892)	06/29/2017	10.00	Vacation (PTO/ETO)	Approved	06/21/2017 03:08:52 AM GMT-07:00	Approved Days of a partially retracted request	1 - Day	NA	NA	NA
Otter, Ugliest S (K208892)	07/01/2017	10.00	Vacation (PTO/ETO)	Approved	06/21/2017 03:21:05 AM GMT-07:00	Approved Days of a partially retracted request	1 - Day	NA	NA	NA

- To select a request from the Calendar Week View, click anywhere on the bar representing the request.

The Approver Time Off Detail section displays. Approvers can approve, deny, place on hold, return, or partially approve or deny a request.

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Example of the Process a Time Off Request screen:

Approver Time Off Detail

Process a Time Off Request

*Required
*Request Status

○ Approved
○ Denied
○ Hold
○ Returned
○ Partially Approved / Denied

Approver Comments:
Enter Comments (Optional)

[Submit]   Cancel

Time Off Request for: fname Elaine Iname (I309774)

Time Off Request ID:
21418828

Submitted On: 08/11/16 11:45 AM GMT-07:00   Submitted By: fname Elaine Iname

Employee Comments:
Anniversary celebration

Time Off Request Type	Current Balance	Available Balance	Future Approved Hours	Hours in this Request
Vacation (PTO/ETO)*	900.00	836.00	0.00	32.00
Vacation Bidding		included above	0.00	0.00
Float	NA	NA	0.00	0.00
Other-Jury Duty			0.00	0.00
Other-Union Business			0.00	0.00
Other-Bereavement Leave			0.00	0.00
Other-Training/Meetings			0.00	0.00
Other-Education Time			0.00	0.00
Other-Doctors Appointment			0.00	0.00
Other-Unpaid Time			0.00	0.00
Other-LMP Time			0.00	0.00
Flexible Personal Days	900.00	900.00	0.00	0.00
Total	**1800.00**	**1736.00**	**0.00**	**32.00**

Current Request - Time Off Request Type	Date	Day	Times	Requested Hours	Approved Days/Hours
Vacation (PTO/ETO)	09/26/2016	Monday	Full Day	8.00	☑
Vacation (PTO/ETO)	09/27/2016	Tuesday	Full Day	8.00	☑
Vacation (PTO/ETO)	09/28/2016	Wednesday	Full Day	8.00	☑
Vacation (PTO/ETO)	09/29/2016	Thursday	Full Day	8.00	☑
Total				**32.00**	**32.00**

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S	M	T	W	T	F	S
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Select a time off calendar entry to view request details.

Employee Details

Employee (NUID)
fname Elaine Iname (I309774)

Preferred e-mail Address
x.y@kp.org

Authorized Approver

Processing time-off requests

Approving a time-off request

Time-off requests from the employees in all approval groups assigned to an approver display on the Incoming Time Off Requests tab.

Select the time-off request by clicking the date(s) in the Date(s) Requested column.

Incoming time-off requests display in a scrollable list. Filter, sort, or scroll through the list to find a request if necessary.

After reviewing the request, select the **Approved** option.

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Click **Submit**.

The status changes to Approved in the Incoming Time Off Requests list.

Note: To see both Submitted and Approved requests, use the filter feature and filter by status, or click the Show All Requests link. By default, only Submitted requests are displayed.

| Incoming Time Off Requests (14) | Time Off Request History | | | | | | | | | |

List View | Calendar Week View   Show All Requests | Filter Requests
Filters Applied: Status, Request Type

Export File   Printable Version

Employee (NUID)	Date(s) Requested	Hours Requested	Time Off Request Type	Status	Date Submitted	Details	Shift	Union Seniority	Alternate Seniority	Rank
Otter, Ugliest S (K208892)	09/21/2017-09/22/2017	16.00	Other	Approved	06/22/2017 07:52:44 PM GMT-07:00	Processed by Approver	1 - Day	NA	NA	NA
Otter, Ugliest S (K208892)	08/15/2017	5.00	Other	Approved	06/21/2017 07:43:42 AM GMT-07:00	Approved Days of a partially retracted request	1 - Day	NA	NA	NA
Otter, Ugliest S (K208892)	08/14/2017	5.00	Other	Approved	06/21/2017 07:32:33 AM GMT-07:00	Reapproved (Partial Retraction Denied)	1 - Day	NA	NA	NA
Otter, Ugliest S (K208892)	08/13/2017	5.00	Other	Approved	06/21/2017 07:32:33 AM GMT-07:00	Approved Days of a partially retracted request	1 - Day	NA	NA	NA
Otter, Ugliest S (K208892)	07/25/2017	15.00	Multiple (Combined)	Approved	06/21/2017 06:17:02 AM GMT-07:00	Approved Days of a partially retracted request	1 - Day	NA	NA	NA
Otter, Ugliest S (K208892)	07/24/2017	15.00	Multiple (Combined)	Approved	06/21/2017 05:59:15 AM GMT-07:00	Reapproved (Partial Retraction Denied)	1 - Day	NA	NA	NA

Denying a time-off request

Time-off requests from employees of an approval group display on the approver's Incoming Time Off Requests list.

1. Select the time-off request from the Incoming Time Off Requests list by clicking the date(s) in the Date(s) Requested column.

Incoming time-off requests display in a scrollable list. Filter, sort, or scroll through the list to find a request as necessary.

After reviewing the request, select the **Denied** option.

Select the reason for the denial from the drop-down list.

All denied time-off requests require a denial reason in order to proceed.

Click **Submit**. Scroll down to see the button if necessary.

Reminder: Per the National Agreement, "Requests for a personal day off or for hours within a single shift shall be granted upon receipt of at least 2 weeks' notice".

The employee is notified by email that the selected request was denied. The reason for denial and comments are included in the email notification.

Returning a time-off request

In some cases, returning a time-off request to an employee with suggested changes to the date(s) or time(s) of the request is preferred rather than denying the request.

When a request is denied, the employee loses his or her place in the request queue. When a request is returned, however, the employee has the opportunity to make changes to the request without losing his or her place in the queue. The system tracks the original date and time a request is submitted, and the request stays in the same place in the request queue.

1. Select the time-off request from the Incoming Time Off Requests list by clicking the date(s) in the Date(s) Requested column.

Time-off requests are displayed in a scrollable list. Filter, sort, or scroll through the list to find a request.

After reviewing the request, select the **Returned** option.

Type a comment in the **Approver Comments** field, describing the changes to the request that you suggest.

Click **Submit**.

The status for the request is changed from Submitted to Returned. The employee receives an email notification with the request details and the comments you entered about the request. The employee can resubmit or withdraw the request.

Placing a time-off request on hold

Approvers may receive time-off requests that cannot be approved, denied, or returned immediately. A request can be placed on hold until the approver is ready to process the request.

When an employee submits a vacation bid request, it is automatically placed on hold by the system. When you are ready to process vacation bid requests, click Show All Requests to view and process vacation bid requests.

Guidelines for holds

Guideline	Detail
Start date	The start date for the hold is the current date.
15-day lead time required between Held Until date and first requested day off	• A hold cannot be placed if the start date of the requested time off is within 15 days of today's date. For example: If today is June 1, you cannot place a hold on a request for time off that starts on June 11. • The Held Until date cannot be within 15 days of the start date of the requested time off. For example: If today is June 1, and the start date of the requested time off is June 30, the Hold Until date cannot be later than June 15.
60-day limit	A hold on a time-off request cannot last more than 60 days.
Holds released day after Held Until date	Holds are released by the system at approximately 10 a.m. the morning after the Held Until date, unless an authorized approver manually releases the hold first.
New holds on same request	You can place a new hold after a prior hold expires on a time-off request, as long as the new hold follows the guidelines in this table.
Vacation bid requests	Vacation bid requests are placed on hold by the system automatically. Vacation bids do not have a time limit for requests placed on hold.

Examples

Placing a hold

1. Select the time-off request from the Incoming Time Off Requests list by clicking the date(s) in the Date(s) Requested column.

Employee (NUID)	Date(s) Requested	Hours Requested	Time Off Request Type	Status	Date Submitted	Details	Shift	Union Seniority	Alternate Seniority	Rank
lname, fname Lynne (K247141)	11/24/2017	8.00	Flexible Personal Days	Submitted	01:02:00 PM GMT-07:00	Action by Approver	1 - Day	NA	NA	NA
lname, fname Lynne (K247141)	12/26/2017	8.00	Vacation (PTO/ETO)	Submitted	01/06/2017 01:18:22 PM GMT-07:00	Pending Action by Approver	1 - Day	NA	NA	NA
lname, fname Lynne (K247141)	12/22/2017	8.00	Vacation (PTO/ETO)	Submitted	01/09/2017 02:38:31 PM GMT-07:00	Pending Action by Approver	1 - Day	NA	NA	NA
lname, fname Lynne (K247141)	08/09/2017	8.00	Flexible Personal Days	Submitted	01/17/2017 10:59:50 AM GMT-07:00	Pending Action by Approver	1 - Day	NA	NA	NA
lname, fname Lynne (K247141)	07/03/2017	8.00	Flexible Personal Days	Submitted	01/18/2017 10:37:45 AM GMT-07:00	Pending Action by Approver	1 - Day	NA	NA	NA
lname, fname J (K243778)	07/05/2017	5.00	Flexible Personal Days	Submitted	01/26/2017 03:34:26 PM GMT-07:00	Pending Action by Approver	R - Rotating	NA	NA	NA

Incoming time-off requests are displayed in a scrollable list. Filter, sort, or scroll through the list to find a request.

After reviewing the request, select the **Hold** option.

The Held Until date defaults to 15 days prior to the start date of the request. To change the date, click in the Held Until field and either type the date in mm/dd/yyyy format or select the date from the calendar. Dates beyond 60 days from today's date or within 15 days of the start date of the request are dimmed on the calendar.

Click **Submit**. (Scroll down to see the button, if necessary.)

A hand icon displays and the status of the request changes to On Hold.

The employee sees in his or her time-off requests list that the selected request was placed on hold. Any comments you entered appear in the details of the request.

Releasing a hold automatically

Holds are released automatically at approximately 10 a.m. on the day after the Held Until date. Process on-hold time-off requests before the Held Until date by opening the request and selecting Approved, Denied, Hold, Returned, or Partially Approved / Denied, as appropriate.

1. Click the date(s) in the Date(s) Requested column for the held request to process the request.

Employee (NUID) ▲	Date(s) Requested	Hours Requested	Time Off Request Type	Status	Date Submitted	Details	Shift	Union Seniority	Alternate Seniority	Rank
lname, fname (K218415)	12/22/2017	8.00	Flexible Personal Days	Withdrawn	01/05/2017 08:25:31 AM GMT-07:00	Removed by Employee	1 - Day	NA	NA	NA
lname, fname (K218415)	12/22/2017, 12/26/2017	16.00	Vacation (PTO/ETO)	Submitted	03/13/2017 07:21:49 AM GMT-07:00	Pending Action by Approver	1 - Day	NA	NA	NA
lname, fname A (Q810162)	12/18/2017-12/22/2017, 12/25/2017-12/29/2017	80.00	Vacation (PTO/ETO)	Withdrawn	01/11/2017 11:32:32 PM GMT-07:00	Removed by Employee	R - Rotating	NA	NA	NA
lname, fname Lynne (K247141)	12/22/2017	8.00	Vacation (PTO/ETO)	Approved	01/09/2017 02:38:31 PM GMT-07:00	Processed by Approver	1 - Day	NA	NA	NA
lname, fname S (F884298)	12/18/2017-12/22/2017	40.00	Vacation Bidding	On Hold	01/24/2017 04:59:17 PM GMT-07:00	Under Review by Approver	1 - Day	NA	NA	NA

Select another request status: **Approved, Denied, Hold, Returned,** or **Partially Approved / Denied**, as appropriate.

Approver Time Off Detail

Process a Time Off Request

Print 🖨 Close

*Required
*Request Status
○ Approved
○ Denied
◉ Hold
○ Returned
○ Partially Approved / Denied

Approver Comments:
Enter Comments (Optional)

*From   *Held Until (mm/dd/yyyy)
01/24/2017   12/17/2017   Held by: **System**

Submit   Cancel

Time Off Request for: **fname S lname (F884298)**   Time Off Request ID: 23411223

Hold Placed On: **01/24/17 04:59 PM GMT-07:00**   Hold Placed By: **System**
Request Rank: **NA**

Approver Comments:

Detail

The employee sees in his or her time-off requests list that the hold on the request was released. Any comments the approver entered appear in the details of the request.

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Approver override

This feature is used to override a previously denied time-off request to a status of Approved.

Once a denied time-off request is approved, no other action on the request can be taken unless the requestor retracts the request.

1. Click the date(s) in the Date(s) Requested column for the held request to approve a request that has previously been denied.

Select the **Approved** option.

Click **Submit**.

Click **Yes, override this denied request**.

Note: The approver can also override a denied retraction request to approved.

A glasses icon displays, the status is changed to Approved, and the detail is changed to Denied Overridden to Approved, indicating that the request has been approved. Hover the pointer over an icon to display a brief description of the icon.

The primary approver and approver proxies receive an email notification informing them a request has been overridden from denied to approved.

Processing retraction requests

Retraction requests from the employees in the approval groups assigned to an approver display with all other time-off requests on the Incoming Time Off Requests tab. Retraction requests are previously approved time-off requests that the employee wants to remove. Processing a retraction request is similar to processing any other type of time-off request.

Note: Partial retraction requests are also displayed on the Incoming Time Off Requests tab. Processing a partial-retraction request requires the same steps as a retraction request.

1. Click **Show All Requests**.

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Select the retraction request from the Incoming Time Off Requests list by clicking the date(s) in the Date(s) Requested column.

Select **Approved, Denied,** or **Hold**, as appropriate.

Click **Submit**.

The status is changed in the Incoming Time Off Requests list.

Note: If a retraction request is denied, the request returns to Approved status. The approver can also override a denied retraction request to approved.

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For partial-retraction requests, the Incoming Time Off Requests list shows two requests, one with a status of Approved and the other with the status of Submitted. The approved request includes the days of the request that were not retracted, and the submitted request includes the days of the request that were partially retracted.

Processing vacation bid requests

Vacation bid requests from the employees in the approval groups assigned to an approver display with all other time-off requests on the Incoming Time Off Requests tab. Each vacation bid request is automatically placed on hold by the system when an employee submits it. Processing a vacation bid request is similar to processing any other type of time-off request.

1. Click **Show All Requests**.

2. Select the vacation bid request from the Incoming Time Off Requests list by clicking the date(s) in the Date(s) Requested column.

Employee (NUID)	Date(s) Requested	Hours Requested	Time Off Request Type	Status	Date Submitted	Details	Shift	Union Seniority	Alternate Seniority	Rank
lname, fname (K218415)	12/22/2017	8.00	Flexible Personal Days	Withdrawn	01/05/2017 08:25:31 AM GMT-07:00	Removed by Employee	1 - Day	NA	NA	NA
lname, fname (K218415)	12/22/2017, 12/26/2017	16.00	Vacation (PTO/ETO)	Submitted	03/13/2017 07:21:49 AM GMT-07:00	Pending Action by Approver	1 - Day	NA	NA	NA
lname, fname A (Q810162)	12/18/2017-12/22/2017, 12/25/2017-12/29/2017	80.00	Vacation (PTO/ETO)	Withdrawn	01/11/2017 11:32:32 PM GMT-07:00	Removed by Employee	R - Rotating	NA	NA	NA
lname, fname Lynne (K247141)	12/22/2017	8.00	Vacation (PTO/ETO)	Approved	01/09/2017 02:38:31 PM GMT-07:00	Processed by Approver	1 - Day	NA	NA	NA
lname, fname S (F884298)	12/18/2017-12/22/2017	40.00	Vacation Bidding	On Hold	01/24/2017 04:59:17 PM GMT-07:00	Under Review by Approver	1 - Day	NA	NA	NA

Incoming time-off requests display in a scrollable list. Filter, sort, or scroll through the list to find a request.

3. Select **Approved, Denied, Hold, Returned,** or **Partially Approved / Denied**, as appropriate.

4. Click **Submit**.

The status is changed in the Incoming Time Off Requests list.

Note: In some regions, the seniority date(s) is available for vacation bidding. The seniority date can be added in TORT when labor and management jointly agree to add it to TORT. Please contact the NAT-TORT@kp.org for more information. TORT does not change any current contractual provisions or policies.

Partially approving requests

A request can be partially approved without returning the request to the employee to resubmit it.

1. Select the request from the Incoming Time Off Requests list by clicking the date(s) in the Date(s) Requested column.

Incoming time-off requests display in a scrollable list. Filter, sort, or scroll through the list to find a request.

2. Select **Partially Approved / Denied**.

Approver Time Off Detail

Process a Time Off Request

*Required
*Request Status
- ○ Approved
- ○ Denied
- ○ Hold
- ○ Returned
- ◉ Partially Approved / Denied

*Reason for Denial

Select a reason for denial
Requested Consecutive Days Off
Before/After Holiday
Staffing Needs
Less Than 2 Weeks Notice
Too Few Hours In Bank
Does not meet local contractual guidelines
Time requested not available
Other

Approver Comments:
Enter Comments (Optional)

Time Off Request ID:
23411223

Hold Placed By: **System**

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3. Select a reason for denial for the dates in the request which are partially denied.

4. Select the days to approve and clear the check boxes for the days to deny. Scroll to the bottom of the screen to clear the days that are not approved.

Current Request - Time Off Request Type	Date	Day	Times	Requested Hours	Approved Days/Hours
Vacation Bidding	12/18/2017	Monday	Full Day	8.00	☑
Vacation Bidding	12/19/2017	Tuesday	Full Day	8.00	☑
Vacation Bidding	12/20/2017	Wednesday	Full Day	8.00	☑
Vacation Bidding	12/21/2017	Thursday	Full Day	8.00	☑
Vacation Bidding	12/22/2017	Friday	Full Day	8.00	☐
Total				**40.00**	**32.00**

2017
◀ **December** ▶

S	M	T	W	T	F	S
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
	Bid	Bid	Bid	Bid	Bid	

Select a time off calendar entry to view request details.

Employee Details

Employee (NUID)
fname S lname (F884298)

Preferred e-mail Address
x.y@kp.org

Authorized Approver
fname lname

Show Employee Details

Once the check boxes for the days that are not approved are cleared, the Submit button is enabled.

    5. Click **Submit**.

The Incoming Time Off Requests list now shows two requests, one with a status of Approved and the other with the status of Denied. The approved request includes the days of the request that were approved, and the denied request includes the days of the request that were denied.

The partially approved request is indicated by a green pie chart icon, and the partially denied request is indicated by a red pie chart icon.

Employee (NUID)	Date(s) Requested	Hours Requested	Time Off Request Type	Status	Date Submitted	Details	Shift	Union Seniority	Alternate Seniority	Rank
lname, fname Lynne (K247141)	12/26/2017	8.00	Vacation (PTO/ETO)	Submitted	01:18:22 PM GMT-07:00	Action by Approver	1 - Day	NA	NA	NA
lname, fname Lynne (K247141)	12/22/2017	8.00	Vacation (PTO/ETO)	Approved	01/09/2017 02:38:31 PM GMT-07:00	Processed by Approver	1 - Day	NA	NA	NA
lname, fname S (F884298)	12/18/2017- 12/21/2017	32.00	Vacation Bidding	Approved	01/24/2017 04:59:17 PM GMT-07:00	Approved Days of a partially approved request	1 - Day	NA	NA	NA
lname, fname S (F884298)	12/22/2017	8.00	Vacation Bidding	Denied	01/24/2017 04:59:17 PM GMT-07:00	Denied Days of a partially approved request	1 - Day	NA	NA	NA
lname, fname R (Z572779)	07/03/2017	8.00	Vacation (PTO/ETO)	Submitted	03/24/2017 11:06:15 AM GMT-07:00	Pending Action by Approver	R - Rotating	NA	NA	NA
lname, fname S (E746245)	06/23/2017	8.00	Vacation (PTO/ETO)	Submitted	03/31/2017 10:29:49 PM GMT-07:00	Pending Action by Approver	2 - Evening	NA	NA	NA

Note: Partially denied requests can later be approved (overridden).

Proxies

Approver proxies

In some cases, a different approver, known as an approver proxy, can be designated to process time-off requests in addition to the primary approver. The approver proxy is able to view and manage time-off requests for the primary approver's group for the duration of the proxy assignment.

Requesting assignment of an approver proxy

If you need an approver proxy assigned, complete the Approver Proxy Add/Remove Form on the Do It Now portlet, and email it to NAT-TORT@kp.org.

Approver proxy responsibilities

Approver proxies have the authority to process all time-off requests for the approval group or groups to which they are assigned. Approval proxies receive email notifications for all time-off requests for those approval groups. The primary approver also receives the same email notifications.

Managing time-off requests as an approver proxy

Approver proxies sign on to TORT using the approver link and their assigned single sign-on credentials. The workspace looks the same as the primary approver workspace. Once signed on to TORT, approval proxies can see and manage the time-off requests for all groups to which they are assigned.

Do It Now

Approver Proxy Add/Remove Form [doc]

Float Employees Add/Remove Form [doc]

My Time Off Requests

Review Time Off Policies

Time Off Approver Job Aid [pdf]

Take TORT Training

How to find TORT Training

Loading Issue? View Fix [doc]

Spanish Materials [pdf]

Questions? View FAQs [doc]

TORT SharePoint Site

To change the Primary Approver the manager should contact TIME at NPS-National-Timekeeping@kp.org

Super User Contact List

To contact us with questions, feedback or suggestions, e-mail us at NAT-TORT@kp.org

Requestor proxies

Some regions allow individuals to be set up in TORT to submit time-off requests on behalf of other employees. This role is known as requestor proxy.

If you need a requestor proxy assigned, contact NAT-TORT@kp.org for a Requestor Proxy Add/Remove Form. After you complete it, email it to NAT-TORT@kp.org.

Note: The requestor proxy and approver proxy cannot be the same person in an approval group.

Adding float employees

Float employees perform job functions for more than one approval group. An employee can request access to see the Calendar Week View of employees in other approval groups. The Calendar Week View is read-only.

An employee's approver can request this access by following these steps:

1. Click the **Float Employee Add/Remove Form** link in the Do It Now portlet.
2. Submit the completed form on behalf of the employee to NAT-TORT@kp.org.
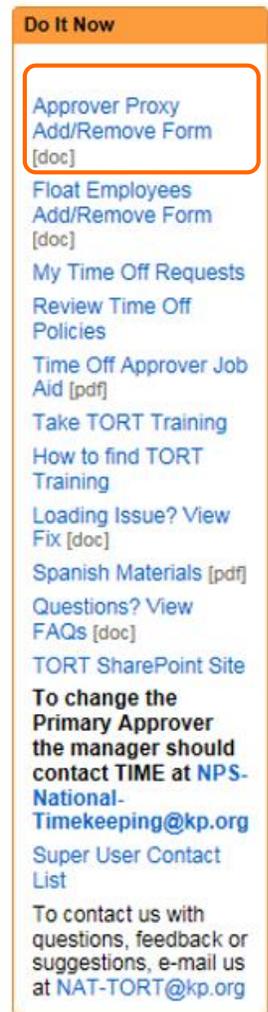
Common TORT user issues

If the authorized approver field displays "No Approver on Record" when the employee signs on to TORT, review these notes:

- Employees on leave of absence cannot use TORT until 7–12 business days after their 1510 return from leave has been received by the HRSC. Please have a manager contact SCAL-pay-integration-team@kp.org for the status.
- The NUID listed on an employee's TIME card profile may not be accurate. Have the approver validate that the NUID listed in the TIME card profile is accurate, and contact NPS-National-Timekeeping@kp.org if a change is needed. Changes are reflected in TORT in 1–3 business days.
- An employee's primary approver must have active status in My HR. If the primary approver is no longer at KP and has been replaced, have the new approver contact NPS-National-Timekeeping@kp.org to be assigned as TIME primary approver for the approval group.

If the TORT approver page has issues, please sign off and ensure you copy/paste the approver link onto a new Internet Explorer or Google Chrome browser page.

Note: Only active KP approvers on the My HR system can use TORT. If the primary approver has an inactive status (due to a transfer, retirement, having left KP), neither employees nor approver proxies within their approval group can use the TORT system until a new primary approver is set up by NPS-National-Timekeeping@kp.org.

Additional resources

When questions, feedback, or suggestions arise, send an email to the National TORT support mailbox: NAT-TORT@kp.org

Visit our National TORT SharePoint site today for TORT reporting, important communications, training resources, and more! https://sites.sp.kp.org/teams/tort

Two web-based training lessons are available to help with using TORT. One is for requestors and one for approvers. Access these lessons on KP Learn at: http://learn.kp.org. Sign on using your NUID, and then search for "TORT" in the learning catalog.