



# **LeavePro NXT Self-Service Employee User Guide**

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# 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.

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**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**.

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User ID [Forgot User ID?](#)

Password [Forgot Password?](#)

LOG IN

New User? [Register](#) here.

English [Español](#) [Français \(Canada\)](#)

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

Registration Step 1 of 4

For your security please enter your work email or mobile number on record.

Work Email ?

Or

Mobile Phone ?

NEXT

No work email? Contact the <help desk> at <800-xxx-yyyy> to establish your identity and mobile phone number as an alternate entry method.

Mobile phone number on record, otherwise contact the <help desk> at <800-xxx-yyyy>.

**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**.

Registration Step 2 of 4

We sent a code to your email or mobile phone. Please enter the code below.

Code

Resend Code

NEXT

Please enter the code we sent to your work email or mobile phone number on record with your employer.

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.

Registration Step 3 of 4

Welcome [email]! Please fill out the following information to set up your account.

User ID ?

Password ?

Confirm Password

NEXT

Error: User ID must be provided.

Error: User ID needs to be at least 6 alpha numeric characters.

User ID needs to be at least 6 alpha numeric characters.

Password must contain at least one upper case letter, one lower case letter, one number, and must be at least ten characters long.

Password and Confirm Password must match.

**Note:** You can reuse your User ID and Password from 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.

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**Registration** Step 4 of 4

Almost done! We'd like to send you real time alerts regarding your leave. Please indicate your preferred method(s) of communication below.

**Text Terms and Conditions**

To receive SMS text alerts regarding your open leave/s, please read and acknowledge the Terms and Conditions, then select the phone number where you would like to receive texts. When these steps are taken, we will need to send you a one-time confirmation message via SMS. Message and data rates may apply. (Reply STOP to any text messages received or uncheck the terms and conditions if you wish to no longer receive text alerts.)

Check here to indicate that you have read and agree to the [Terms and Conditions](#).

As we manage and update your leave, SMS Text alerts will be sent during the hours of 11 A.M. EST and 6 P.M. EST.

**SUBMIT**

English | Español | Français (Canada)

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.

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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.

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

**Your privacy is important to us.**

We're introducing multi-factor authentication (MFA) to keep your data even more secure. Now, you'll have another layer of security protecting your account besides just your password.

**Security Question 1**

Choose a security question. ▾

Answer

**Security Question 2**

Choose a security question. ▾

Answer

**Security Question 3**

Choose a security question. ▾

Answer

**Is this a trusted device and would you like to remember this device for future use?**  
Important: Don't click this if on a public or shared computer!

SAVE

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

**Verification required.**

We need to verify your identity.

**How would you like to verify your identity?**

**Mobile Text**  
Send code to my mobile phone: (\*\*\*) \*\*\*-0944  
Message and data rates may apply.

**Email**  
Send code to my email: r\*\*\*\*\*h@\*\*\*\*\*e.com

**Challenge**  
Answer one of my challenge questions

NEXT

## 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**.

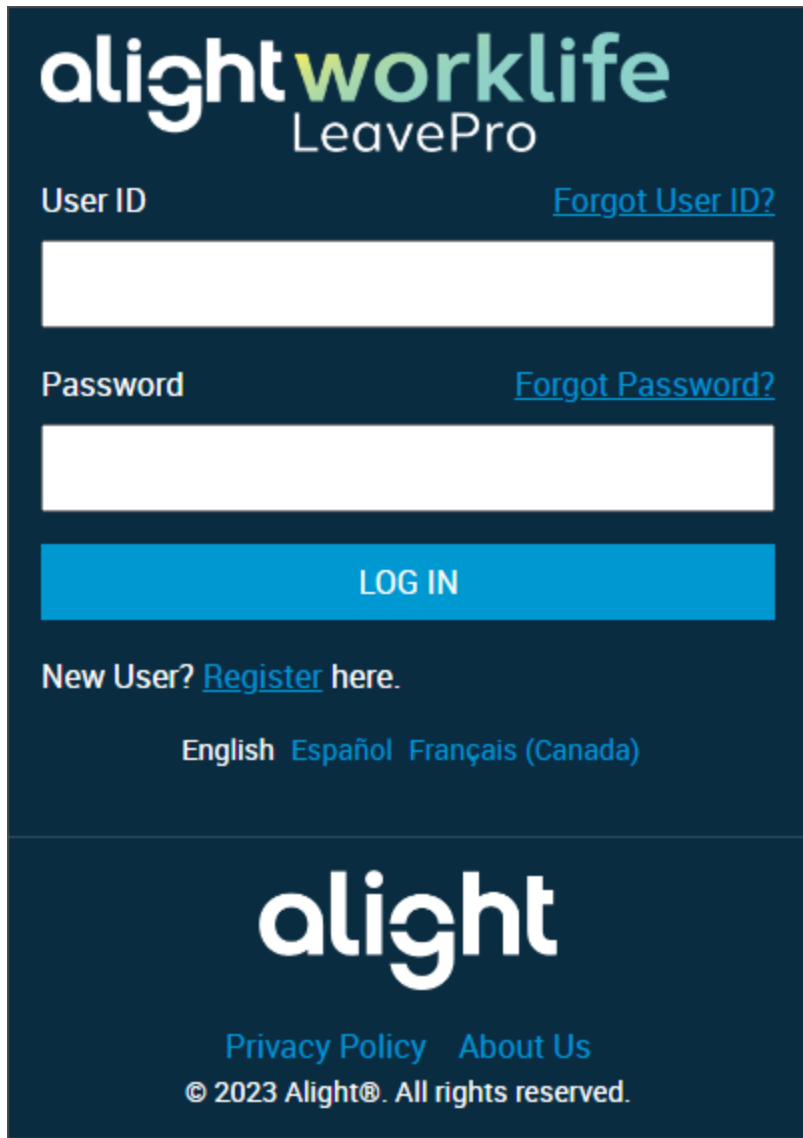


## Account Recovery

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.



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LeavePro

User ID [Forgot User ID?](#)

Password [Forgot Password?](#)

LOG IN

New User? [Register here.](#)

English [Español](#) [Français \(Canada\)](#)

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

Account Recovery

Forgot your account information? No worries.  
Let's find your account. Enter...

Work Email ?

Or

Mobile Phone ?

NEXT

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

Account Recovery

We sent a code to your email or mobile phone. Please enter the code below.

Code ?

Resend Code

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.

Account Recovery

We found your account!

username

Create New Password (Optional)

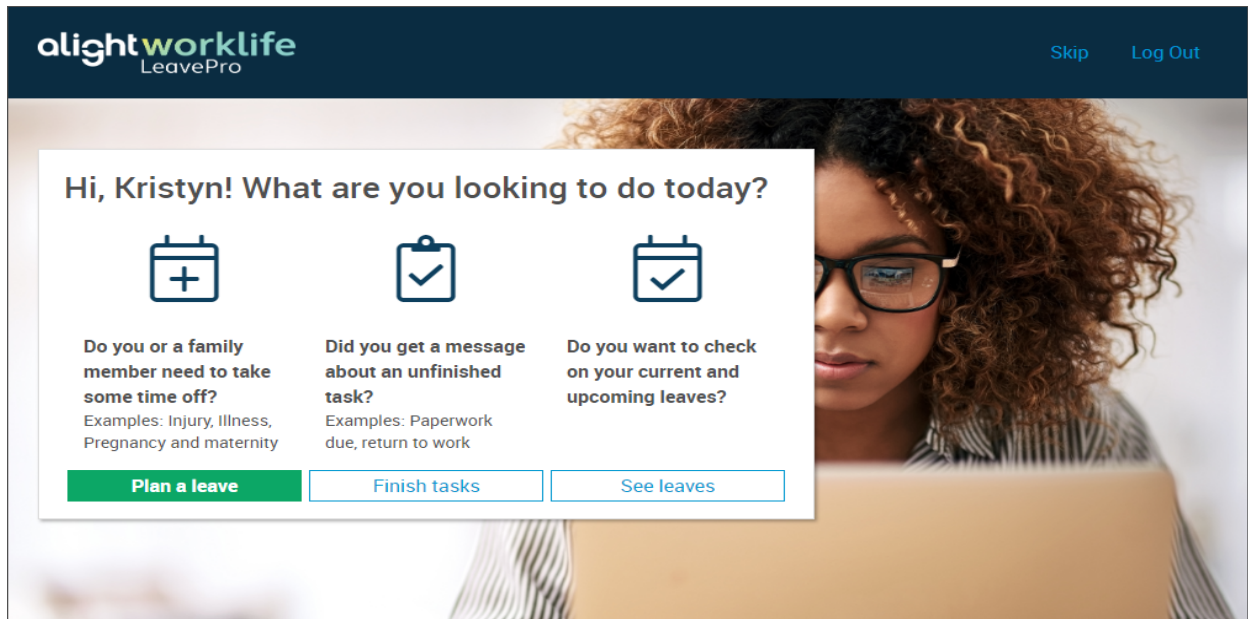
New Password ?

Confirm Password

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

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**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.

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What's the reason for your leave? \*

Personal Health Condition  
 Pregnancy / Maternity  
 Family Health Condition  
 Other

Select leave reason

Back Next

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" on page 60.

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:

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Help Profile Log Out

Home Employees Reports My Leaves Admin

Tasks

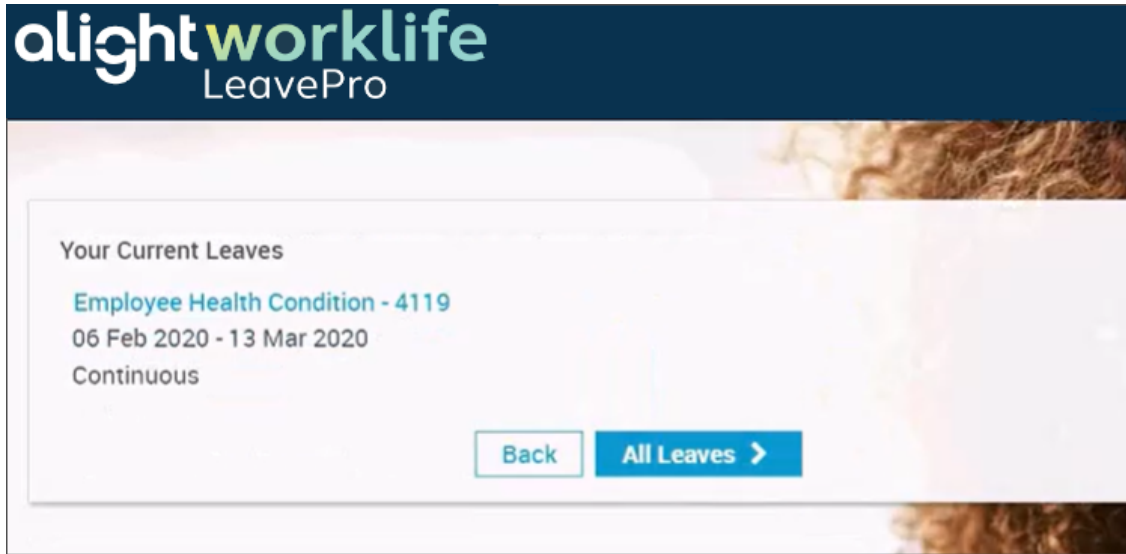
Paperwork Due	Due 11 Mar 2018	Start
	#5654 4374 4382	
Confirm Return to Work	Due 23 Apr 2018	Start
	#9888 4832 2119	



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" on the next 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" on the next page.

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

# My Leaves Page

The **My Leaves** main landing page has various sections to help you manage your leaves.

The screenshot shows the 'My Leaves' dashboard with the following sections highlighted by numbered callouts:

- 1 CURRENT LEAVES**: Shows a card for 'Employee Health Condition - 8362' with a progress bar and a 'Details' link.
- 2 CLOSED LEAVES**: Shows a card for 'Family Health Condition - 4817' with a 'Leave Cancelled' status and a 'Details' link.
- 3 PLAN BALANCES**: Shows a table for 'ADA' with columns for Entitlement Amount, Used, and Remaining Amount.
- 4 TASKS**: Shows a message 'You have no tasks to complete.'
- 5 RESOURCES**: Shows a message 'No resources available.'
- 6 Plan a Leave**: A green button in the top right navigation bar.

The separate areas highlighted above are:

**1. Current Leaves**

- Review status of the two most recent leaves.
- Report intermittent time off.

**2. Closed Leaves** - Review details of closed leaves.

3. **Plan Balances** - Displays the remaining balance for each plan.

4. **Tasks**

- Confirm expected return to work.
- Review and upload paperwork due.

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

6. **Plan a Leave** - Begin a new claim entry.

You can also click Help to view the help pages, Click Profile to review or edit personal information, or click Log out to log out of the application.

## View All

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

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[Help](#)
[Profile](#)
[Log Out](#)

My Leaves

Welcome Brad
Plan a Leave

### CURRENT LEAVES

[View All \(136\) >](#)

**Employee Health Condition - 4715**  
8142 0742 4715  
02 Aug 2022 to 02 Feb 2023  
Intermittent

✓  
Leave Requested

📄  
Complete Your Paperwork

👤  
Decision Made

🏠  
On Leave

🚪  
Leave Ends

**What happens next?**  
You currently have unfinished paperwork for this leave. View and complete your Paperwork Due tasks.

[Add Time](#) [Details](#)

**Employee Health Condition - 2465**  
2270 2468 2465  
01 Mar 2022 to 01 Oct 2022 (Originally 01 Mar 2022 to 01 Sep 2022)  
Intermittent

✓  
Leave Requested

✓  
Complete Your Paperwork

✓  
Decision Made

✓  
On Leave

🚪  
Leave Ends

⚠️ **Date Change Pending for 01 Mar 2022 to 01 Oct 2022.**

**What happens next?**  
Your leave has started. You will be notified to confirm your return to work date near the end of your leave.

[Add Time](#) [Details](#)

### TASKS

[View All \(6\) >](#)

**Paperwork Due**  
Due 13 Jan 2022  
1186 8869 8833 [Start](#)

**Confirm expected return to work**  
Due 29 Jun 2022  
6586 9384 2847 [Start](#)

### RESOURCES

[View All \(0\) >](#)

No resources available

### CLOSED LEAVES

[View All \(125\) >](#)

**Employee Health Condition - 3169**  
9300 2822 3169  
27 Jun 2022 to 30 Sep 2022

⊘  
Leave Cancelled

[Details](#)

**ADA**

**Leave Reasons**  
Employee Health Condition, Pregnancy/Maternity, Workplace Accommodations

Entitlement Amount	Used	Remaining Amount
Unlimited	0 week(o)	Unlimited

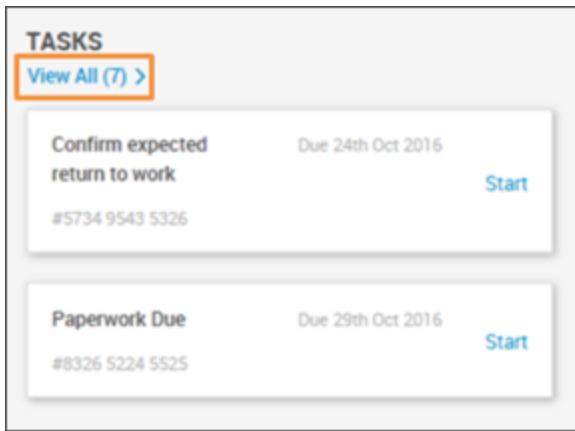
**District of Columbia Employee Medical Leave**

**Leave Reasons**  
Employee Health Condition, Pregnancy/Maternity

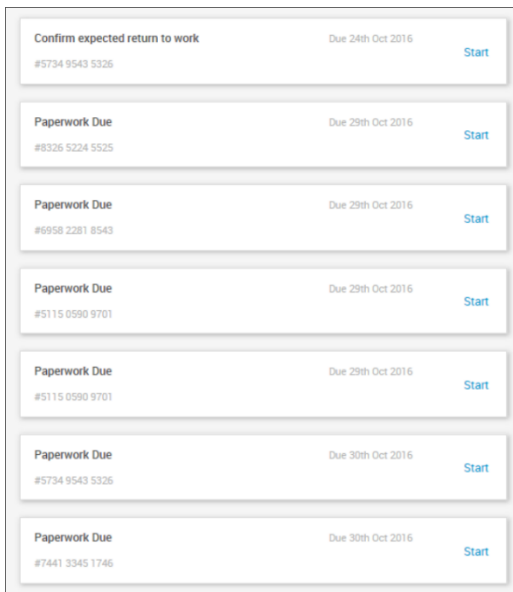
Entitlement Amount	Used	Remaining Amount
16 week(o)	0.68 week(o)	15.33 week(o)

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:

- **Leave Information** about this leave
- The **Leave Status Tracker** that shows the progress of this leave
- A **Timeline** specific to the leave
- **Tasks** specific to the leave
- **Documents** specific to the leave

### LEAVE INFORMATION

Employee Health Condition - 6680  
#7481 2151 6680  
01 May 2020 - 30 Jun 2020  
Intermittent

[Edit Leave Dates](#)

### LEAVE STATUS

✔  
Leave Requested

📄  
Complete Your Paperwork

⚖️  
Decision Made

👤  
On Leave

**What happens next?**

You currently have unfinished paperwork for this leave. View and complete your Paperwork Due tasks.

### INTERMITTENT TIME OFF REQUESTS

May 2020							June 2020						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2		1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28	29	30				
31													

[Add Time](#)

No time off requests for 11 May 2020.

### TIMELINE

Start Date

End Date

### TASKS

[View All \(0\)](#)

You have no tasks to complete.

### DOCUMENTS

[View All \(1\)](#)

Eligibility Mail

Sent 21 Apr 2020 [↓](#)

## Reduced Work Schedule View

If the leave is a Reduced Work Schedule leave, the Reduced Schedule Time Off section is displayed.

**REDUCED SCHEDULE TIME OFF**

August 2021      September 2021

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7				1	2	3	4
8	9	10	11	12	13	14	5	6	7	8	9	10	11
15	16	17	18	19	20	21	12	13	14	15	16	17	18
22	23	24	25	26	27	28	19	20	21	22	23	24	25
29	30	31	26	27	28	29	30						

Reduced Schedule (22 Aug 2021 to 28 Aug 2021)

Date	Regular Schedule	Hours Lost	Reduced Schedule
22 Aug 2021	5.3 hrs	3.3 hrs	2.0 hrs
23 Aug 2021	5.3 hrs	3.3 hrs	2.0 hrs
24 Aug 2021	5.3 hrs	3.3 hrs	2.0 hrs
25 Aug 2021	5.3 hrs	3.3 hrs	2.0 hrs
26 Aug 2021	5.3 hrs	3.3 hrs	2.0 hrs
27 Aug 2021	5.3 hrs	3.3 hrs	2.0 hrs
28 Aug 2021	5.3 hrs	3.3 hrs	2.0 hrs

Select the date you wish to view in the calendar (default is the current day).

The table on the left will display the **Regular Schedule**, the **Reduced Schedule** and the **Hours Lost** for the current leave. This ensures the Employee and Employer is always aware of the hours that the employee plans to work on the specific leave and can plan accordingly.

## Print Leave Detail

Click the **Leave Options** drop-down and then click **Print Leave Detail** button on the Leave Details page to open the Print Details window displaying the details of your personal information, your employment information, your leave information, and your leave plan details.



## Print Leave Details



### PERSONAL INFORMATION

Name:	Alternate Mailing Address:	Email Address(es):
Brad Engel	N/A	Work: [redacted]@CompanyLPD2.com
Mailing Address:	Alternate Mailing Address Effective:	Phone Number(s):
[redacted] Washington, DC 20005 United States	N/A	Home: 505.555.5656 Work: 506.556.5757

### EMPLOYMENT INFORMATION

Job Title:	Employee #:	Work Address:	Work State:
Engineer Technician	10021492	N/A	DC
Hire Date:	Employment Status:		
Saturday, November 22, 1980	Active		

### LEAVE INFORMATION

Leave ID:	Leave Reason:
2270 2468 2465	Employee Health Condition
Leave Start Date:	Leave End Date:
01 Mar 2022	01 Oct 2022
Last Day at Work:	Received Date:
28 Feb 2022	10 Feb 2022
Leave Manager:	
[redacted]@reedgroup.com	

#### Leave Schedules:

Intermittent Schedule

Date Range:	Occurrence Type:
01 Mar 2022 to 01 Oct 2022	Incapacity/Unspecified

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Hours Scheduled	0:00	8:00	8:00	8:00	8:00	8:00	0:00

### RTW INFORMATION

Estimated Partial Return to Work:	Estimated Full Duty Return to Work:
N/A	N/A
Actual Partial Return to Work:	Actual Full Duty Return to Work:
N/A	N/A

### LEAVE PLAN DETAILS

Leave Plan:	Job Protected:	Leave Type:	Status:	Date Range:
Family Medical Leave Act	Yes	Intermittent	Approved	01 Mar 2022 to 01 Sep

The **Leave Schedules** section displays the leave type (continuous, intermittent, reduced work schedule...etc) and displays the Date Range of the leave.

Leave Schedules:  
Continuous Schedule

Date Range:  
31 Mar 2022 to 18 Apr 2022

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Hours Scheduled	0:00	8:00	8:00	8:00	8:00	8:00	0:00

If applicable, you may see an option to use PTO for this leave.

Do you want to utilize PTO during this leave request? (If yes, please check the checkbox.)

Yes

If applicable, additional questions regarding the leave are displayed.

Would you like to supplement your STD pay with your available PTO for this leave?

No

If applicable, do you wish to save any of your paid time off upon returning from leave?

No

In the **Chronology Information** sections, a chronology of events for the leave is displayed.

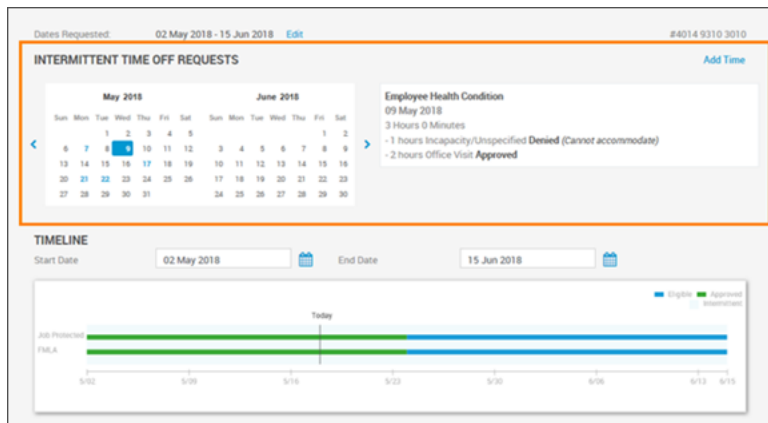
**CHRONOLOGY INFORMATION**

Date/Time:	Event:
4/6/2022 6:39:40 AM EDT	Leave is STD. Assigned disability manager
4/6/2022 6:39:41 AM EDT	Leave is STD. Assigned disability manager

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.

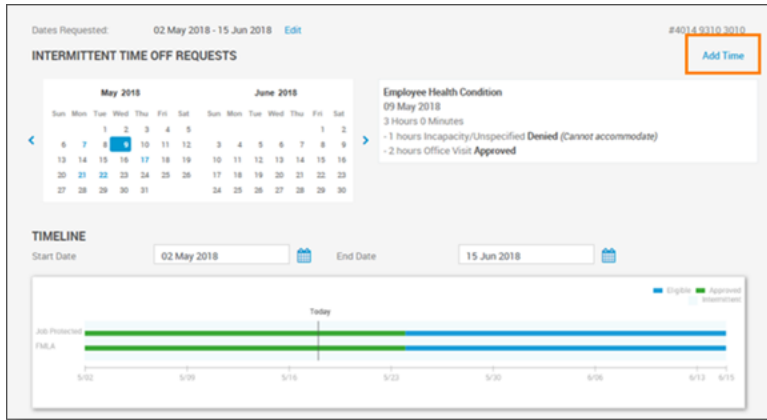
The ITOR detail tile includes:

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

- Click the date for the new ITOR.
- Select the Time Off Type Requested.
- Select the Amount of Time Requested.
- Click Submit.

**Time Off Request - Patrick Aaron** ✕

**LEAVE INFORMATION**

Leave of Absence: Employee Health      Time Period: 02 May 2018 - 15 Jun 2018 (Intermittent)  
Condition

**TIME OFF DETAILS**

Requested Time Off Date \*  
21 May 2018

Time Off Type Requested \*      Amount of Time Requested \*  
Inspecuity/Unapeoified      1 hrs 00 min ✕

Time Off Type Requested \*      Amount of Time Requested \*  
Office Visit      2 hrs 30 min ✕

ADD TYPE

**HOURS AVAILABLE**

Available hours as of 21 May 2018

Family Medical Leave Act  
336 hour(s)

---

Certification 1 - (Inspecuity/Unapeoified) - 02 May 2018 - 15 Jun 2018  
You're currently certified to take 4 hours, 3 times every 1 week(s).

Certification 2 - (Office Visit) - 02 May 2018 - 15 Jun 2018  
You're currently certified to take 2 hours, 2 times every 1 week(s).

**INTERMITTENT TIME OFF REQUESTS**

May 2018							June 2018							
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
			1	2	3	4	5					1	2	
	6	7	8	9	10	11	12	3	4	5	6	7	8	9
	13	14	15	16	17	18	19	10	11	12	13	14	15	16
	20	21	22	23	24	25	26	17	18	19	20	21	22	23
	27	28	29	30	31			24	25	26	27	28	29	30

**Employee Health Condition**

23 May 2018  
4 Hours 0 Minutes

- 1 hours Inspecuity/Unapeoified **Denied** (Did not meet requirements)
- 2 hours Inspecuity/Unapeoified **Approved**
- 1 hours Inspecuity/Unapeoified **Pending**

CANCEL    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.

Employment Status: Active  
 Dates Requested: 15 Dec 2017 - 31 Aug 2018 [Edit](#)

**Add Company Paid Time Off**

#4014 9310 3010

**INTERMITTENT TIME OFF REQUESTS** [Add Time](#)

**May 2018** **June 2018**

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5							1	2
6	7	8	9	10	11	12	3	4	5	6	7	8	9
13	14	15	16	17	18	19	10	11	12	13	14	15	16
20	21	22	23	24	25	26	17	18	19	20	21	22	23
27	28	29	30	31			24	25	26	27	28	29	30

**Employee Health Condition**  
 09 May 2018  
 3 Hours 0 Minutes  
 - 1 hours Incapacity/Unspecified **Denied** (Cannot accommodate)  
 - 2 hours Office Visit **Approved**

**TIMELINE**

Start Date: 02 May 2018 End Date: 15 Jun 2018

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.

**PTO Request - Graciela Perez** ✕

---

**LEAVE INFORMATION**

Leave of Absence: Time Period:  
 Employee Health Condition: 15 Dec 2017 - 31 Aug 2018

---

**AVAILABLE HOURS**

Type	Hours	Minutes
Personal Holiday	47	07
Sick Time	0	00
Vacation	293	02

---

**PTO DETAILS**

PTO Date \*

**ADD TYPE**

CANCEL SUBMIT

To request PTO:

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

**LEAVE INFORMATION**

Leave of Absence:      Time Period:  
Employee Health      15 Dec 2017 - 31 Aug 2018  
Condition

---

**AVAILABLE HOURS**

Type	Hours	Minutes
Personal Holiday	47	07
Sick Time	0	00
Vacation	293	02

---

**PTO DETAILS**

PTO Date \*

12 Jul 2018

July 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Amount of Time Requested \*

hrs
  min
 ✕

CANCEL

SUBMIT

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 day.

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 dates 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.

**LEAVE INFORMATION**

Leave of Absence: Employee Health  
Time Period: 15 Dec 2017 - 31 Aug 2018  
Condition

---

**AVAILABLE HOURS**

Type	Hours	Minutes
Personal Holiday	47	07
Sick Time	0	00
Vacation	293	02

---

**PTO DETAILS**

PTO Date \*

PTO Type Requested \*

Amount of Time Requested \*  
 hrs  min

PTO Type Requested \*

Amount of Time Requested \*  
 hrs  min

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.

**LEAVE INFORMATION**

Leave of Absence: Employee Health  
Time Period: 15 Dec 2017 - 31 Aug 2018  
Condition

---

**AVAILABLE HOURS**

Type	Hours	Minutes
Personal Holiday	47	07
Sick Time	0	00
Vacation	293	02

---

**PTO DETAILS**

PTO Date \*

PTO Type Requested \*

Amount of Time Requested \*  
 hrs  min

PTO Type Requested \*

Amount of Time Requested \*  
 hrs  min

---

**Note:** If you're reviewing the Timeline for a new leave that does not yet have eligibility confirmed with the Call Center, fewer details will appear.

---

5. Click Submit when finished.

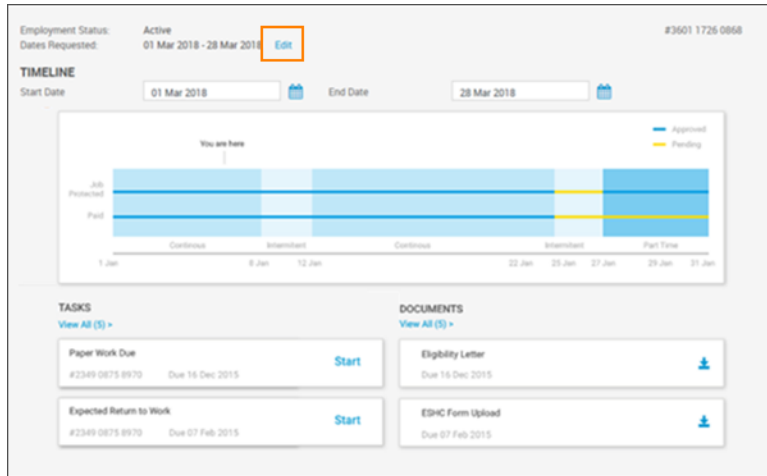


## Change Leave Start Date and/or End Date

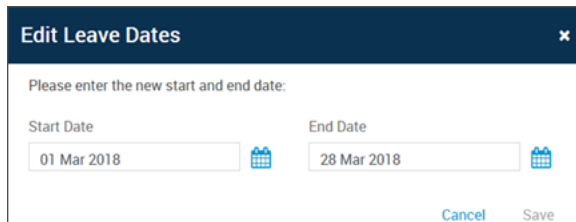
You can change the leave start date and/or end date with the Edit link on the Leave Detail page. The Edit link shows on the Leave Detail page for Open leaves only. The link is not displayed for Closed (Completed), Cancelled, or incomplete leaves.

To change your 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.

## Intermittent Time Off Request

The Add Time feature allows you to request intermittent time off for a Current Leave.

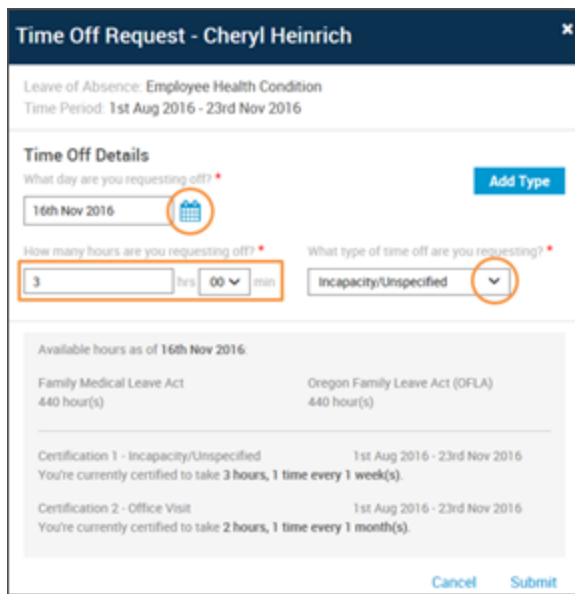
1. Click Add Time for the Current Leave you want to request time off.



Employee Health Condition - 5020  
#3355 8824 5020  
1st Aug 2016 - 23rd Nov 2016  
Add Time Details >

2. In the Time Off Request window:

- Enter the Date for the intermittent time off.
- Enter the Amount of Time for that date in both whole hours and minutes.
- Select the Type of Time OFF being requested from the drop-down menu.
  - Office Visit
  - Incapacity/Unspecified



Time Off Request - Cheryl Heinrich

Leave of Absence: Employee Health Condition  
Time Period: 1st Aug 2016 - 23rd Nov 2016

**Time Off Details**

What day are you requesting off? \*  
16th Nov 2016

How many hours are you requesting off? \*  
3 hrs 00 min

What type of time off are you requesting? \*  
Incapacity/Unspecified

Available hours as of 16th Nov 2016:

Family Medical Leave Act	Oregon Family Leave Act (OFLA)
440 hour(s)	440 hour(s)

Certification 1 - Incapacity/Unspecified 1st Aug 2016 - 23rd Nov 2016  
You're currently certified to take 3 hours, 1 time every 1 week(s).

Certification 2 - Office Visit 1st Aug 2016 - 23rd Nov 2016  
You're currently certified to take 2 hours, 1 time every 1 month(s).

Cancel Submit

3. To request an additional type of time off for the same Current Leave and Date, click **Add Type**.

**Time Off Request - Cheryl Heinrich**

Leave of Absence: Employee Health Condition  
Time Period: 1st Aug 2016 - 23rd Nov 2016

**Time Off Details**

What day are you requesting off? \*

16th Nov 2016

How many hours are you requesting off? \*      What type of time off are you requesting? \*

3 hrs 00 min      Incapacity/Unspecified

**Add Type**

- A second section is added with the only other type of time off available to you. Enter the Amount of Time for the additional type of time off in both the hours and minutes.

**Time Off Request - Cheryl Heinrich**

Leave of Absence: Employee Health Condition  
Time Period: 1st Aug 2016 - 23rd Nov 2016

**Time Off Details**

What day are you requesting off? \*

16th Nov 2016

How many hours are you requesting off? \*      What type of time off are you requesting? \*

3 hrs 00 min      Incapacity/Unspecified ❌

How many hours are you requesting off? \*      What type of time off are you requesting? \*

2 hrs 00 min      Office Visit ❌

Available hours as of 16th Nov 2016:

Family Medical Leave Act 440 hour(s)	Oregon Family Leave Act (OFLA) 440 hour(s)
---	---

Certification 1 - Incapacity/Unspecified      1st Aug 2016 - 23rd Nov 2016  
You're currently certified to take 3 hours, 1 time every 1 week(s).

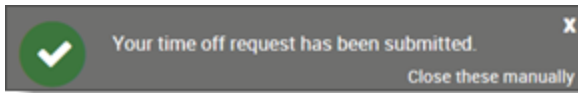
Certification 2 - Office Visit      1st Aug 2016 - 23rd Nov 2016  
You're currently certified to take 2 hours, 1 time every 1 month(s).

Cancel      Submit

- Click **Submit** to finalize your request.

---

**Note:** When the Time Off Request is submitted, a confirmation popup will display at the bottom of the screen.



---

## 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 from the **My Leaves** page or the **Leave Detail** page if both of the following conditions are met:

- All of your 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.

**To cancel a leave:**

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

The screenshot displays the 'My Leaves' interface. At the top, the user is greeted with 'Welcome Brad' and a 'Plan a Leave' button. The 'CURRENT LEAVES' section lists two leaves. The first leaf, 'Family Health Condition - Child - Child - 6187', is in progress. Its progress bar shows five stages: 'Leave Requested' (completed), 'Complete Your Paperwork' (highlighted with a yellow box), 'Decision Made', 'On Leave', and 'Leave Ends'. Below the progress bar, a 'What happens next?' section indicates that there are unfinished paperwork tasks and provides a 'Cancel Leave' button (highlighted in yellow), 'Add Time', and 'Details' options. The second leaf, 'Family Health Condition - Spouse - jane - 1001', is partially visible below.

Or, click the **Leave Options** drop-down and then click **Cancel Leave** button on the **Leave Detail** page for the leave you want to cancel.

**Family Health Condition**

**LEAVE INFORMATION**

Family Health Condition - 6187  
#6046 0496 6187  
08 Jun 2020 - 29 Jun 2020  
Intermittent

[Edit Leave Dates](#)

**LEAVE STATUS**

Leave Requested → Complete Your Paperwork → Decision Made → On Leave → Leave Ends

What happens next?  
You currently have unfinished paperwork for this leave. View and complete your Paperwork Due tasks.

[Cancel Leave](#) (highlighted)

[Print Leave Details](#)

[View Leave Managers](#)

**INTERMITTENT TIME OFF REQUESTS**

[Add Time](#)

May 2020 | June 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1 2	1	2	3	4	5	6	
3	4	5	6	7	8	9	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28	29	30				
31													

No time off requests for 11 May 2020.

**TIMELINE**

Start Date: 08 Jun 2020 | End Date: 29 Jun 2020

**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.

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

**Cancel Pending Leave**

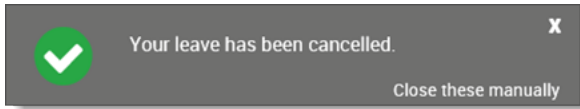
The following pending leave will be cancelled:

Employee Health Condition - 0141  
Intermittent  
#1055 2245 0141  
02 Oct 2018 - 28 Dec 2018

Are you sure you want to cancel this leave? **Canceling a leave is a permanent action.**

[Cancel](#) [Confirm](#)

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



4. Once a leave has been canceled, it is removed from your Current Leaves on the My Leaves page.

## Closed Leaves

You can click **Details** for a specific Closed Leave to access management features on the leave detail page.



### Details for Closed leaves include:

1. A **Timeline** specific to the leave.
2. **Tasks** specific to the leave.
3. **Documents** specific to the leave.

## Tasks

You can click **View All** to see a list of all Tasks associated with your leaves, or you can click **Start** for a specific Task to initiate action.



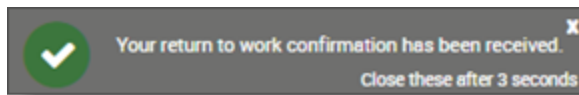
## Confirm Expected Return to Work

You can confirm or deny the **Expected Return to Work** date within a case file.

1. Click Start in the Confirm expected return to work task. The Confirm expected return to work pop-up box will appear.

2. If the original Expected Return to Work date is correct.
  - a. Select Yes (default).
  - b. Click Submit.

- c. A confirmation message appears.



- d. The Return to Work task is removed from your task list.

3. If the original Expected Return to Work date is incorrect:
  - a. Select No.
  - b. Click Submit.

**TASK: Confirm expected return to work.**

Due: 21st Oct 2016 #5734 9543 5326

We show your Employee Health Condition - 5326 is scheduled to end on 24th Oct 2016. Please confirm you are expecting to return to work on your next scheduled day.

Yes  No

Cancel Submit

- c. Selecting No generates a task for a Leave Specialist who will contact you regarding the change.
- d. The Return to Work task is removed from your task list.

## Paperwork Due

You can upload and submit required forms directly into a case.

1. Click Start in the Paperwork Due task. A pop-up box will appear listing any required forms.

**TASKS**

[View All \(5\) >](#)

Paperwork Due Due 29th Oct 2016

#5734 9543 5326 Start

### TASK: Paperwork Due. ✕

Due: 24th Oct 2016 #5734 9543 5326

There is outstanding paperwork for your Employee Health Condition - 8543 leave. A letter was sent to you recently that contains additional instructions and necessary forms to process your leave. Letters associated with your leave are available under Details on the main page. If you have completed your forms, please upload them below.

Submitting your forms as soon as possible will avoid your leave being denied due to missing paperwork.

Form(s)	
Attending Provider Statement	<a href="#">Upload</a>
Request for Leave of Absence-Memorandum of Understanding and Election of Supplemental Paid Time Off	<a href="#">Upload</a>
Authorization for Provider's Release of Medical Records	<a href="#">Upload</a>

Add additional forms:

[Upload](#)

[Cancel](#) [Submit](#)

2. Click Upload to the right of the document to be submitted.

**TASK: Paperwork Due.** ✕

Due: 24th Oct 2016 #5734 9543 5326

There is outstanding paperwork for your Employee Health Condition - 8543 leave. A letter was sent to you recently that contains additional instructions and necessary forms to process your leave. Letters associated with your leave are available under Details on the main page. If you have completed your forms, please upload them below.

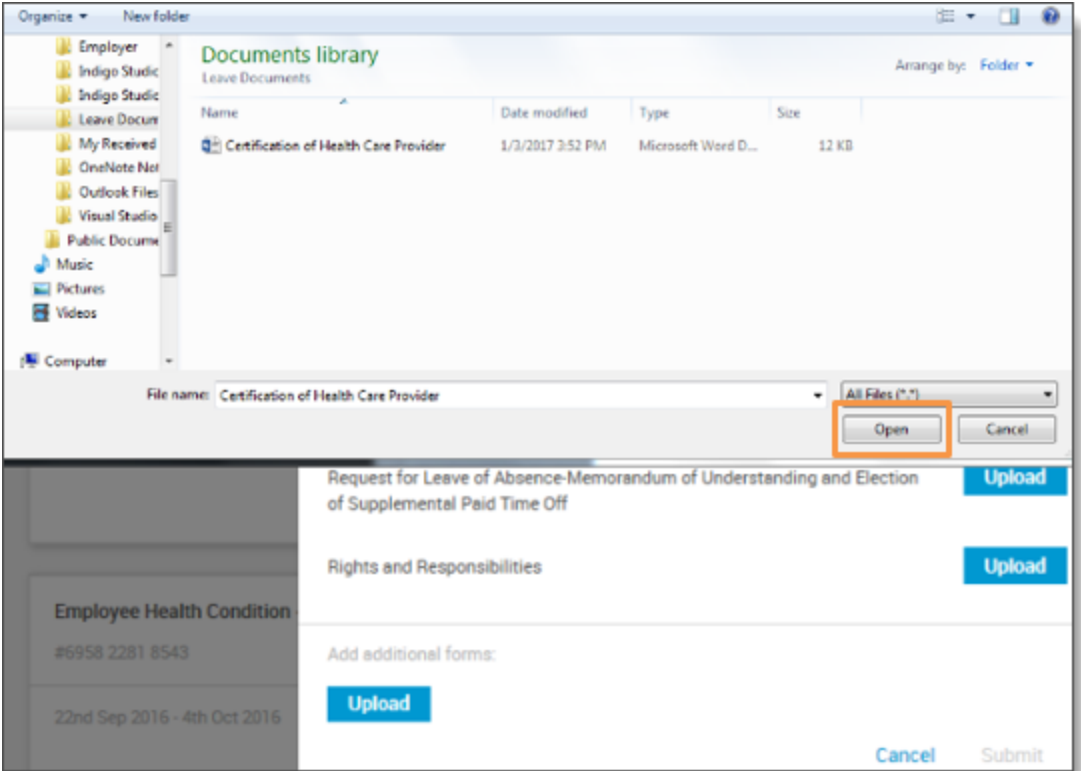
Submitting your forms as soon as possible will avoid your leave being denied due to missing paperwork.

Form(s)

Attending Provider Statement	<input type="button" value="Upload"/>
Request for Leave of Absence-Memorandum of Understanding and Election of Supplemental Paid Time Off	<input type="button" value="Upload"/>
Authorization for Provider's Release of Medical Records	<input type="button" value="Upload"/>

Add additional forms:

3. Choose a file to upload, and click Open.



4. Uploaded paperwork will appear with a red X. Click Submit.

**TASK: Paperwork Due.** ✕

Due: 29th Oct 2016 #6958 2281 8543

There is outstanding paperwork for your Employee Health Condition - 8543 leave. A letter was sent to you recently that contains additional instructions and necessary forms to process your leave. Letters associated with your leave are available under Details on the main page. If you have completed your forms, please upload them below.

Submitting your forms as soon as possible will avoid your leave being denied due to missing paperwork.

---

Form(s)

Certification of Health Care Provider

[Certification of Health Care Provider.docx](#) ✕

Request for Leave of Absence-Memorandum of Understanding and Election of Supplemental Paid Time Off Upload

Rights and Responsibilities Upload

---

Add additional forms:

Upload

Cancel Submit

If different forms are required, you can Add additional forms.

1. In Paperwork Due, click Upload in the Add additional forms sections.

**TASK: Paperwork Due.** ✕

Due: 29th Oct 2016 #6958 2281 8543

There is outstanding paperwork for your Employee Health Condition - 8543 leave. A letter was sent to you recently that contains additional instructions and necessary forms to process your leave. Letters associated with your leave are available under Details on the main page. If you have completed your forms, please upload them below.

Submitting your forms as soon as possible will avoid your leave being denied due to missing paperwork.

Form(s)

Certification of Health Care Provider  
Certification of Health Care Provider.docx ✕

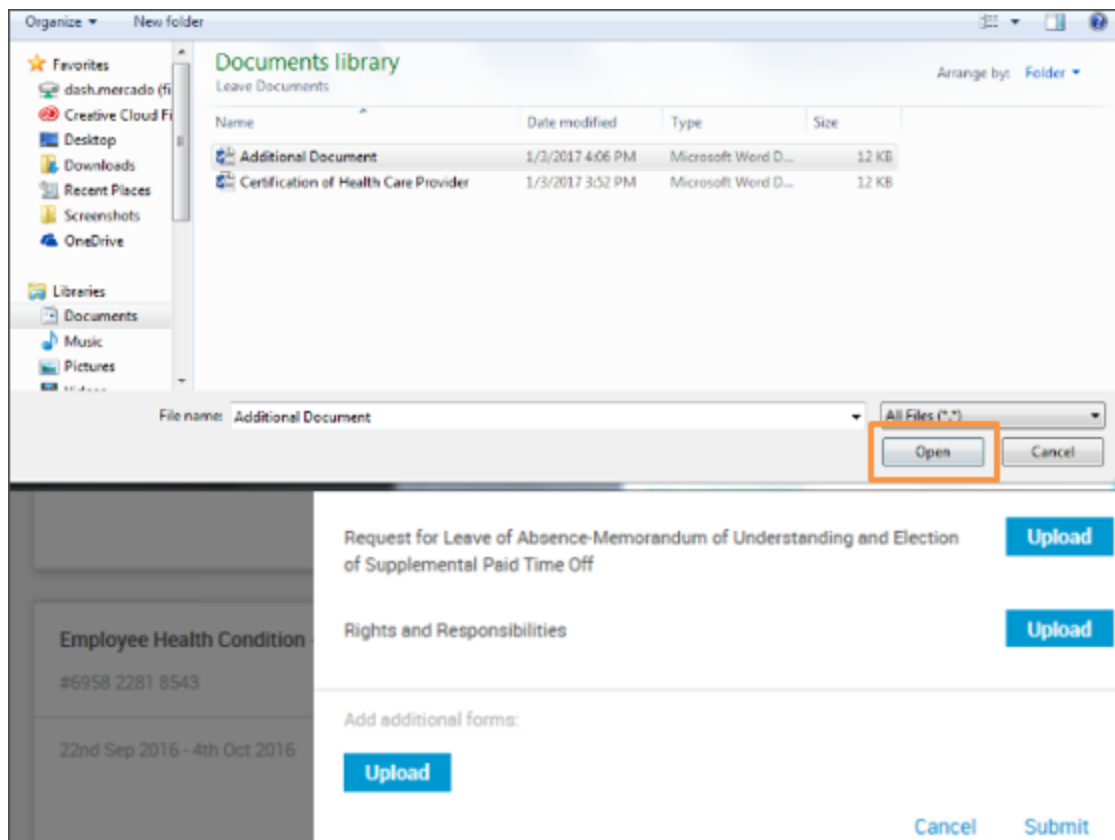
Request for Leave of Absence-Memorandum of Understanding and Election of Supplemental Paid Time Off [Upload](#)

Rights and Responsibilities [Upload](#)

Add additional forms:  
[Upload](#)

[Cancel](#) [Submit](#)

2. Choose a file to upload, and click Open.



3. Uploaded paperwork will appear with a red X. Click Submit.



### TASK: Paperwork Due. ✕

Due: 29th Oct 2016 #6958 2281 8543

There is outstanding paperwork for your Employee Health Condition - 8543 leave. A letter was sent to you recently that contains additional instructions and necessary forms to process your leave. Letters associated with your leave are available under Details on the main page. If you have completed your forms, please upload them below.

Submitting your forms as soon as possible will avoid your leave being denied due to missing paperwork.

---

Form(s)

Certification of Health Care Provider

Certification of Health Care Provider.docx ✕

Request for Leave of Absence-Memorandum of Understanding and Election of Supplemental Paid Time Off Upload

Rights and Responsibilities Upload

---

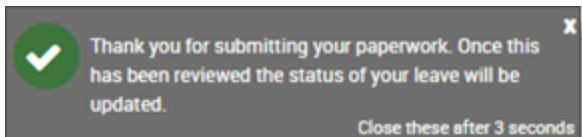
Add additional forms:

Additional Document.docx ✕

Upload

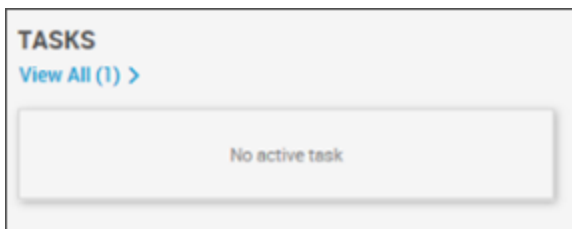
Cancel Submit

4. A confirmation message appears.



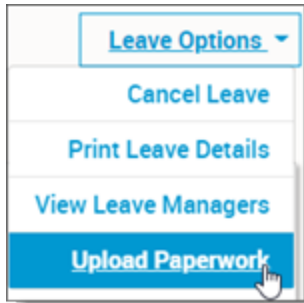
---

**Note:** When all Tasks are complete, the Task section will show No active task.



You can upload a document to your leave at any time, even if there is no Paperwork Due task.

To do this select **Upload Paperwork** from the **Leave Options** drop-down menu.



The **Upload Paperwork** window is displayed.

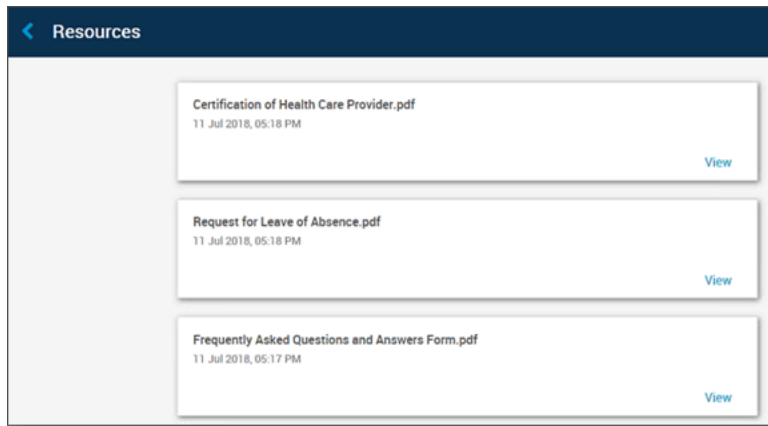
A screenshot of the 'Upload Paperwork' window. The window has a dark blue header with the title 'Upload Paperwork' and a close button (X). Below the header, there is a section labeled 'Form(s)'. The main content area contains the following elements: a paragraph of instructions: 'To upload your document, please select document type first, then you can upload your document. Repeat this step to upload multiple documents. Submit once all documents are uploaded.'; a 'Document Type: \*' label followed by a drop-down menu with the text 'Select Document Type'; a section with two labels: 'Add additional forms:' and 'Selected document type:'. At the bottom left, there is a grey 'Upload' button. At the bottom right, there are two blue buttons: 'Cancel' and 'Submit'.

Select the document type from the drop-down and click **Upload**.

## Resources

In Resources, you can view client documents (e.g., client plan 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.



# Leave Status Tracker

The Leave Status Tracker will display the progress of your leave and what stage of the leave process you are in.

The Leave Status Tracker will be displayed on the **My Leaves** page, within the card for each leave listed, as well as on the **Leave Details** page for each specific leave.

## From My Leaves page

**Employee Health Condition - 8362**  
 #1308 1747 8362  
 01 Apr 2020 - 08 May 2020  
 Continuous

**Leave Requested**    **Complete Your Paperwork**    Decision Made    On Leave    Return to Work

**What happens next?**  
 You currently have unfinished paperwork for this leave. View and complete your Paperwork Due tasks.

[Details](#)

## From Leave Details page

**LEAVE STATUS**

**Leave Requested**    **Complete Your Paperwork**    Decision Made    On Leave    Return to Work

**What happens next?**  
 You currently have unfinished paperwork for this leave. View and complete your Paperwork Due tasks.

The various stages of the leave process are represented by different icons as shown above. The green check mark means that step is complete, the dark blue icon is in a pending or processing stage, and the light gray icons are the next steps in the process.

The **What happens next?** text will alert you as to why the leave is in it's current state (dark blue icon) and what needs to happen for that stage to complete and the leave process to move forward to the next step.






If you have filed for an extension to your leave you will see that displayed under the leave status icons:




In the above example, the pending extension message is displayed below the tracker, the new date being changed to "06 Feb 2020 - 13 Mar 2020". For your reference, the original date of the leave is still shown in parentheses following the new date.

## Stages of a leave

The Leave Status Tracker uses easily identifiable icons to represent the various stages of the leave's progress.

Icon	Explanation
 - Leave Requested	Displayed when you first create a leave request. When the leave request is considered complete this icon changes to the green check mark.
 - Complete Your Paperwork	In this stage you will need complete any paperwork that is required for your leave. When paperwork has been uploaded this icon changes to the green check mark.
 - Decision Made	In this stage a decision is being made on your requested leave, this icon will change to the green check mark once the decision has been made.
 - On Leave	This stage designates that you are currently on leave. When the leave has been approved this icon changes to the green check mark.
 - Return to Work	In this stage you will be returning to work. Once you have returned to work this icon changes to the green check mark.

 <p>- Completed</p>	<p>The name of the step will still be displayed, but this icon indicates that this stage of the process is complete.</p>
--	--

- **Leave Requested** - Displayed when you first create a leave request. When the leave request is considered complete this icon changes to the green check mark.
- **Complete Your Paperwork** - In this stage you will need complete any paperwork that is required for your leave. When paperwork has been uploaded this icon changes to the green check mark.
- **Decision Made** - In this stage a decision is being made on your requested leave, this icon will change to the green check mark once the decision has been made.
- **On Leave** - This stage designates that you are currently on leave. When the leave has been approved this icon changes to the green check mark.
- **Return to Work** - In this stage you will be returning to work. Once you have returned to work this icon changes to the green check mark.
- **Completed** - The name of the step will still be displayed, but this icon indicates that this stage of the process is complete.

# Profile

Click Profile to view or edit your:

1. Personal Information
2. Communication Preferences (for Notifications and Alerts)
3. Job Information (view only)

The screenshot displays a profile page with three main sections, each with an 'Edit' button:

- 1 PERSONAL INFORMATION**:
  - Mailing Address: 2785 Derek Drive, Austin, TX 73301, United States
  - Phone Number(s): Mobile 513.555.3434 (preferred text), Home 513.555.1212 (preferred voice)
  - Email: Shanti.gupta@example.com
- 2 COMMUNICATION PREFERENCES**:
  - Notifications: Shanti.gupta@example.com
  - Alerts: Mobile 513.555.3434
  - Address: 2785 Derek Drive, Austin, TX 73301, United States
  - Notes: Preferred contacts for receiving quick, real-time information about your leave. Preferred contacts for receiving leave-related correspondence.
- 3 JOB INFORMATION**:
  - Employee Status: Active
  - Employee #: 220878
  - Job Title: Buyer Sr
  - Hire Date: Monday, April 09, 2007
  - His Worked Last 12 Months: 1932
  - Work State: CO
  - Work Address: 8001 E 80th Ave, Henderson, CO 80540, United States
  - Work Email: jackson@Company.com
  - Key Employee: No

## Personal Information

You can review or edit your Personal Information.

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

This close-up screenshot shows the 'PERSONAL INFORMATION' section of the profile page. The 'Edit' button is highlighted with a red box.

**PERSONAL INFORMATION**

- Mailing Address: 2785 Derek Drive, Austin, TX 73301, United States
- Phone Number(s): Mobile 513.555.3434 (preferred text), Home 513.555.1212 (preferred voice)
- Email: Shanti.gupta@example.com

[Edit](#)

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

- Mailing Address

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**Note:** There is a configuration that will switch the mailing address field to read-only so that it cannot be changed. Contact Alight for more information regarding this.

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- Phone Numbers
- 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.

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## 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.

The screenshot shows a web form titled "Personal Information - Edit". The "Mailing Address" section is highlighted with a blue box around the "Add Address" button. The form contains the following fields:

- Mailing Address:** Country (United States), Address Line 1 (2785 Derek Drive), Address Line 2 (empty), City (Austin), State (TX), Postal Code (73301).
- Phone Number(s):** Phone 1 (5135553434, Mobile, Preferred Voice selected, Preferred Text selected), Phone 2 (5135551212, Home, Preferred Voice selected, Preferred Text selected).
- Personal Email Address:** Email (Shanti.gupta@example.com).

Buttons: "Add Address" (highlighted), "Add Number", "Cancel", "Submit".

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

**Personal Information - Edit**

**Mailing Address** Add Address

Country \*  
United States

Address Line 1 \*  
2785 Derek Drive

Address Line 2

City \* State \* Postal Code \*  
Austin TX 73301

**Alternate Mailing Address** ✖

Country \*  
United States

Address Line 1 \*

Address Line 2

City \* State \* Postal Code \*  
 AL

Start Date \* End Date \*  
 [Calendar Icon] [Calendar Icon]

**Phone Number(s)**

Phone 1: 5135553434 Ext. Type: Mobile Preferred Voice:  Preferred Text:  ✖

Phone 2: 5135551212 Ext. Type: Home Preferred Voice:  Preferred Text:  ✖

[Add Number](#)

**Personal Email Address**  
Email: Shanti.gupta@example.com

[Cancel](#) [Submit](#)

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.

**COMMUNICATION PREFERENCES**

Notifications: Shanti.gupta@example.com  
2785 Derek Drive  
Austin, TX 73301  
United States  
Preferred contacts for receiving leave related correspondence.

Alerts: Mobile 513.555.3434  
Preferred contacts for receiving quick, real-time information about your leave.

[Edit](#)

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

Communication Preferences - Edit

Notification Preferences [Edit](#)

Preferred contacts for receiving leave-related correspondence.

Personal Email

Work Email

Personal Mailing Address

Alert Preferences [Edit](#)

Preferred contacts for receiving quick, real-time information about your leave. Phone numbers must be capable of receiving SMS messages. Message and data rates may apply.

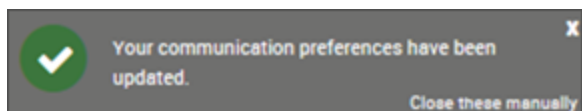
Preferred Text

Personal Email

Work Email

Cancel Submit

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



## Logout

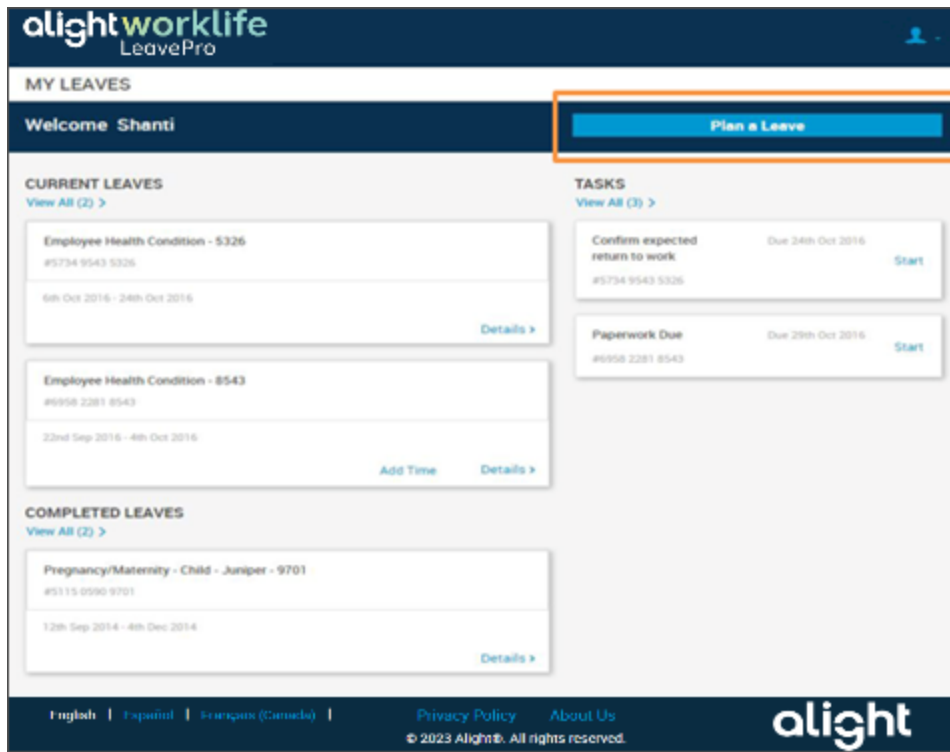
Click Logout when you're finished with your session and want to exit Self-Service.

# Plan a Leave

You can submit a leave by clicking the Plan a Leave button from the My Leaves main landing page.

## To initiate a leave request:

1. On the My Leaves page, click Plan a Leave.



The Plan a Leave splash page is displayed.



- Click **BEGIN** to start planning a leave. You can also click **CANCEL** to return to the My Leaves page.  
The **Plan a Leave Get Started** page is displayed.

- Select the **type of leave**:
  - Personal Health Condition
  - Pregnancy / Maternity
  - Family Health Condition
  - Other

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

- Upon selecting the leave reason, the **type of time off** options will display.

The screenshot shows a web form titled "Plan a Leave". The first section is "What's the reason for your leave?" with radio button options: "Personal Health Condition" (selected), "Pregnancy / Maternity", "Family Health Condition", and "Other". Below "Other" is a dropdown menu labeled "Select leave reason". The second section is "What type of leave are you requesting?" with three selectable options, each in a box with a radio button below it: "Continuous?" (Out full time between two different dates. Example: 1 week, 8 weeks, etc.), "Intermittent?" (Out occasionally between two different dates. Example: Doctor's Appointments, Physical Therapy Sessions), and "Reduced Work Schedule?" (Working less than your normal schedule between two different dates. Example: 3 days a week instead of 5 days a week).

5. Select the Type of Leave using the button underneath the options:

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

6. Click **Next**.

The **Add Dates** page is displayed.

The screenshot shows the 'Plan a Leave' interface. At the top, there's a navigation bar with 'alightworklife LeavePro' and links for 'Help', 'Profile', and 'Log Out'. Below that is a 'My Leaves' section and a 'Plan a Leave' header. A progress bar indicates three steps: 'Get Started', 'Add Dates' (which is highlighted), and 'Review & Submit'. The main content area is titled 'Add Dates' and includes the text 'Tell us your leave dates and some details about your leave.' and 'Employment Status: Active'. The form contains several fields with calendar icons: 'When does your leave start? \*', 'When does your leave end? \*', 'When did this illness/injury occur? \*', and 'When is your last day of work? \*'. There is also a text input for 'How many hours did you or will you work on your last day?' and another calendar field for 'When do you expect to return to work?'. Two radio button questions follow: 'Was your illness/injury work related? \*' and 'Have you filed (or plan to file) a claim for worker's compensation? \*'. At the bottom, there are four buttons: 'Previous', 'Cancel', 'Resume Later', and 'Next'.

7. Enter the start and end dates for the leave.
8. Enter how many hours you worked on your last day.
9. Enter the date you expect to return to work.
10. Click **Next** when finished.
11. If you have a current STD (Short Term Disability) plan, than you will need to enter more details about this leave.

The **Add Details** page is displayed.

alightworklife  
LeavePro

Help Profile Log Out

My Leaves

Plan a Leave

Get Started Add Dates Add Details Review & Submit

**Add Details** Employment Status: Active

Next, let's add more details about your leave.

Briefly describe your illness/injury \*

Were you seen in the emergency room (ER)? \*

Were you admitted to the hospital? \*

Was your illness/injury the result of an accident? \*

What is your treatment plan (if any)? (Example: physical therapy)

Do you require surgery? (Example: open heart surgery)

Do you anticipate the need for restrictions and/or accommodations to return to work?

Job Class? ⓘ

○ Sedentary Work ○ Light Work ○ Medium Work ○ Heavy Work ○ Very Heavy Work

Add a Provider (up to 3)

\* Required Field

Previous Cancel Resume Later Next

12. On the **Add Details** page, supply all required information (designated with an asterisk). Click **Next** when finished.
13. If you request a leave reason for a related person, the workflow will guide you to input the 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

14. Select the family member for whom you are taking the leave, and click **Submit** to continue.

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

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

The screenshot shows a form titled "Family - Add New" with the following fields and options:

- Title: dropdown menu
- First Name: text input (marked with an asterisk)
- Middle Name: text input
- Last Name: text input (marked with an asterisk)
- Suffix: dropdown menu
- Date of Birth: text input with a calendar icon (marked with an asterisk)
- Gender: dropdown menu (marked with an asterisk)
- Phone Number: text input
- Extension: text input
- Relationship: dropdown menu (marked with an asterisk)
- Relationship Type: dropdown menu
- Address 1: text input
- Address 2: text input
- Country: dropdown menu (marked with an asterisk)
- City: text input
- State: dropdown menu (marked with an asterisk)
- Postal Code: text input
- Email: text input
- Full time student: checkbox
- Disabled: checkbox
- Incapable of self care: checkbox
- Military per 2008 FMLA: checkbox
- Notice of Death: text input with a calendar icon (marked with an asterisk)
- Deceased Date: text input with a calendar icon (marked with an asterisk)

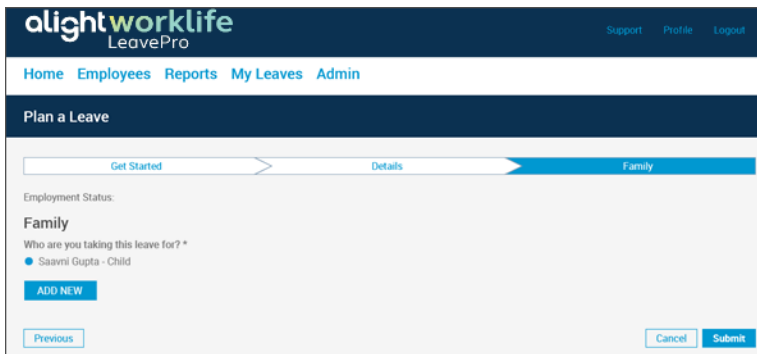
Buttons: "Cancel" and "Submit" are located at the bottom right of the form.

Depending on your 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.

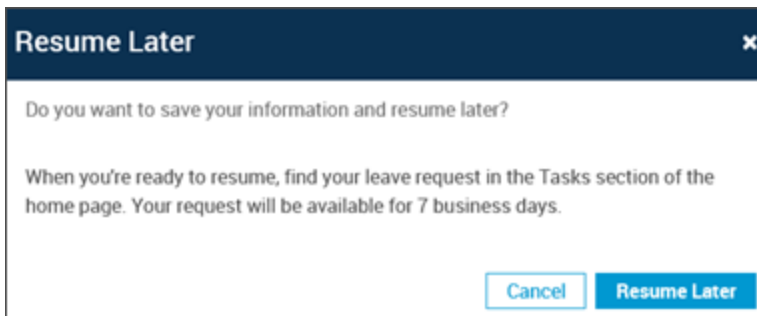
Click **Submit** when all required information has been entered to continue the Plan a Leave workflow. Click **Cancel** or **X** to close the window without saving the information provided.

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



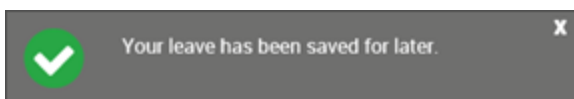
- At any time during the **Plan a Leave** process you can select **Resume Later** to save your progress and resume at a later time.

The **Resume Later** confirmation window is displayed.



- Click **Resume Later** again to confirm or click **Cancel** to return to **Plan a Leave**.

After selecting **Resume Later** you will see a Confirmation Message.



- When all required information has been entered, a Review and Submit page will be displayed.

**alightworklife**  
LeavePro

Help Profile Log Out

**My Leaves**

**Plan a Leave**

Get Started Add Dates Add Details **Review & Submit**

**Review & Submit** Employment Status: Active

You're almost finished. Let's make sure everything is correct.

Employee Health Condition - Continuous Leave

**Add Details** [Edit Details](#)

**When did this illness/injury occur?**  
03 Jun 2019

**Last Work Date**  
13 Jun 2019

**Emergency Room Visit**  
03 Jun 2019

**Surgery Date Scheduled**  
14 Jun 2019

**Briefly describe your illness/injury**  
fall

**Were you seen in the emergency room (ER)?**  
Yes

**Were you admitted to the hospital?**  
No

**Was your illness/injury work related?**  
Yes

**Have you filed (or plan to file) a claim for worker's compensation?**  
No

**Was your illness/injury the result of an accident?**  
Yes

**What is your treatment plan (if any)? (Example: physical therapy)**  
surgery

**Do you require surgery? (Example: open heart surgery)**  
Yes

**Will you be taking time away from work prior to surgery?**  
No

**Job Class?**  
Light Work

**Do you anticipate the need for restrictions and/or accommodations to return to work?**  
Yes

**Leave Dates** [Edit Dates](#)

**Leave Dates**  
14 Jun 2019 - 12 Jul 2019

**Estimated Return To Work**  
13 Jul 2019

**How many hours did you or will you work on your last day?**  
2

[Previous](#) [Cancel](#) [Submit](#)

18. Click **Edit Details** or **Edit Dates** to go back and make changes to the information you have entered.
19. If all of the information is correct, click **Submit**.

The Plan a Leave Confirmation Page is displayed.



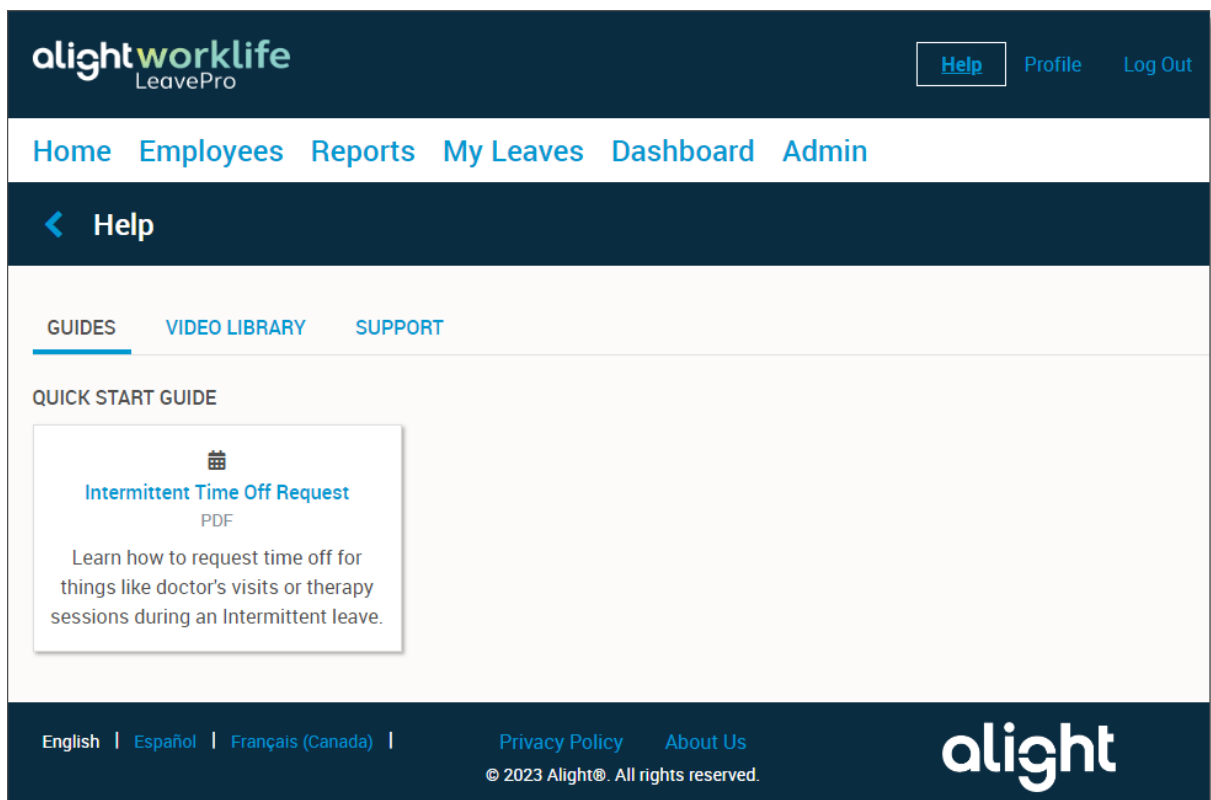
# Help Section

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.

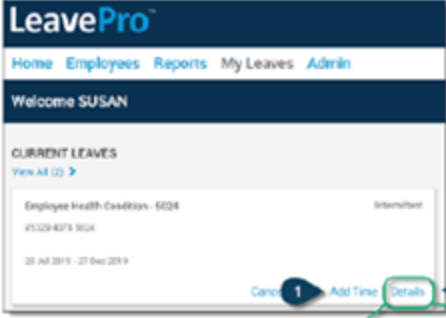
# Quick Start Guide

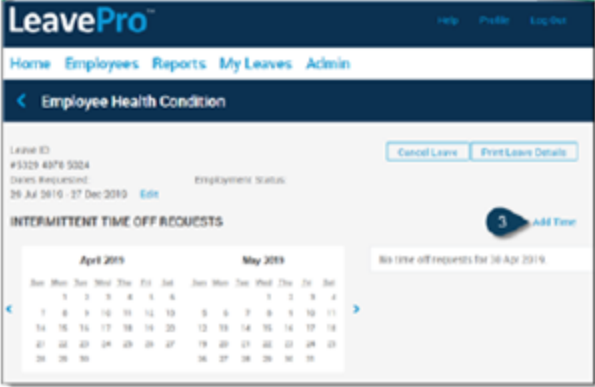
## Submitting an Intermittent Time Off Request

Task time:  
10 mins

## Intermittent Time Off Request

### Start Request





1

To start an Intermittent Time Off Request, from the [My Leaves](#) page, click **Add Time** on the card for the appropriate leave.

2

Alternatively, you can click [Details](#) to open the [Leave Details](#) page.

3

From the [Leave Details](#) page click **Add Time** to start a request.

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.

[GUIDES](#)   **[VIDEO LIBRARY](#)**   [SUPPORT](#)

**FEATURED**

Personalized Experience   Seamless Process   Team of Experts

[Introduction to ReedGroup](#)  
This is an overview of ReedGroup and how we help you during a leave of absence

**LEAVE INFORMATION**

[What is a Leave of Absence?](#)  
Learn what a "Leave of Absence" is and reasons you may need to take one

**LEAVE INFORMATION**

[How to Choose your Leave Type](#)  
This video helps you understand what type of leave to request, depending on how you need to take time away from work

**LEAVE INFORMATION**

[Employee Leave Process Overview](#)  
The leave of absence process is explained - from how to request a leave to when you're ready to return to work

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

The **Support** tab is displayed.



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Help Profile Log Out

Home Employees Reports My Leaves Dashboard Admin

< Help

GUIDES VIDEO LIBRARY SUPPORT

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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	<p>Updated with enhancements, including:</p> <ul style="list-style-type: none"> <li>• Ability to change leave start and/or end dates</li> <li>• Addition of Intermittent Time Off Request (ITOR) calendar and details</li> <li>• Ability to Add Company Paid Time Off</li> <li>• Addition of a Resources section containing client documents</li> <li>• Removal of Edge 3.0 as compatible Web browser</li> </ul>	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	<p>Full document rebrand and style changes</p> <p>Added Help section to document</p>	4.0	Technical Communications
March 5, 2021	Added Multi-Factor	4.1	Technical Communications

Date	Description	Version	Revised By
	Authentication and Single Source Log in		
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, including: <ul style="list-style-type: none"> <li>• Added Upload Paperwork feature to the Leave Details Page</li> <li>• Added new info displayed on the Print Details page</li> <li>• Added note for the ability to configure the mailing address to be read-only</li> <li>• Added text message opt in to the registration process</li> <li>• Added multiple intermittent leaves display</li> <li>• Added Reduced Work Schedule view</li> </ul>	5.0	Technical Communications
October 2, 2023	Updated the user guide to conform to Alight's branding standard.	5.1	Technical Communications