

Human Resources Absence Management Manager Guide

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REVISION CONTROL

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5/25/11	Lori Arthur	Updated number of days for refresh employee list; added notation about submitting 634 Form if absences entered on behalf of employee.	3.0, 4.0, 5.0
9/25/15	Shakeyla Mitchell	Updated the instructions to log in to the portal	

Review / Approval History

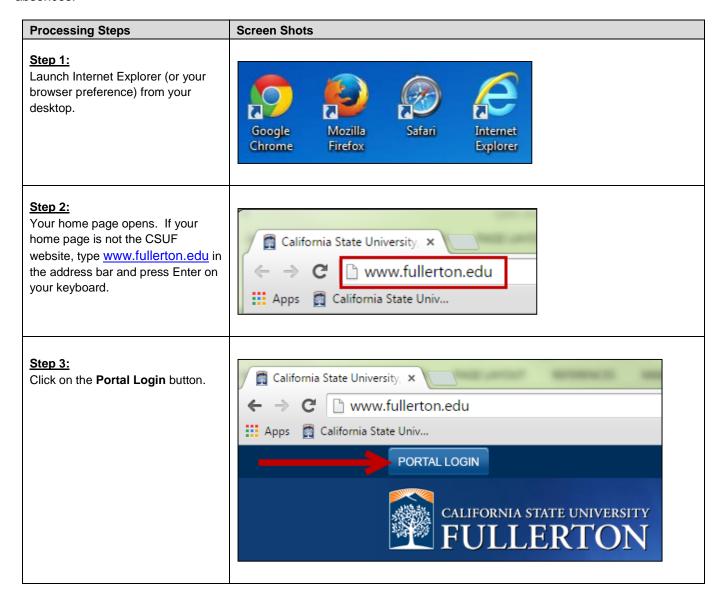
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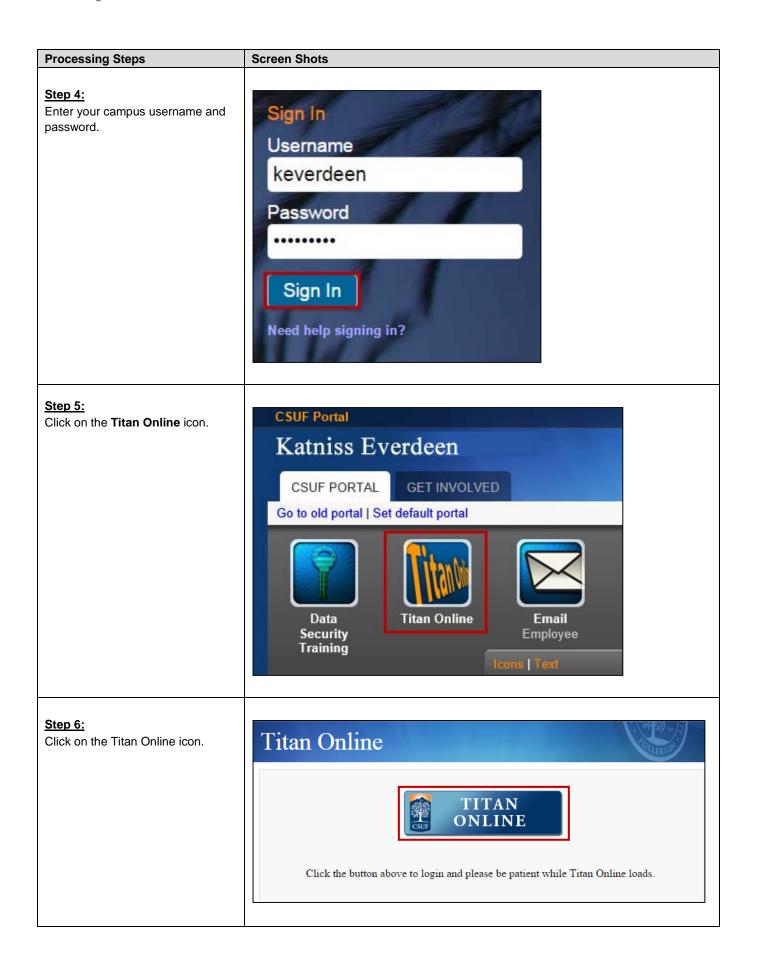
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1.0 Accessing Manager Self Service

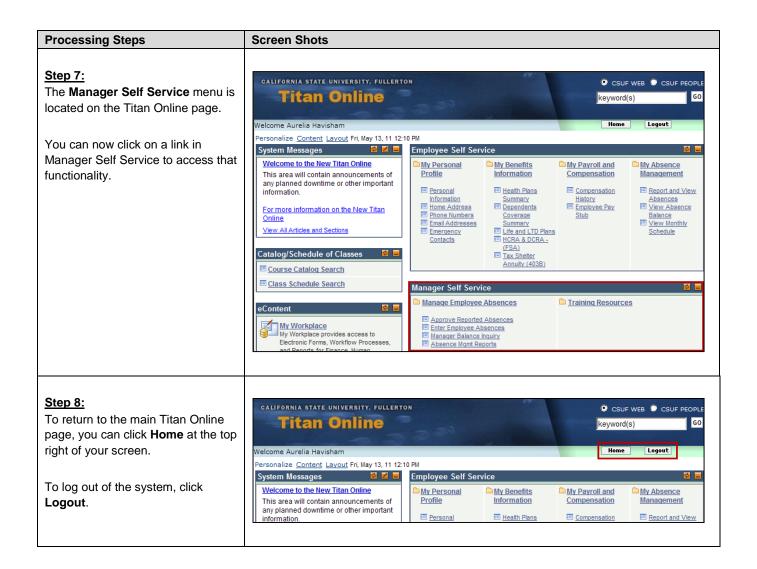
The Manager Self Service menu allows managers to access employee absence information and approve reported absences.



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2.0 Reviewing & Approving Reported Absences

Managers can review and approve absences entered by employees using the Manager Self Service menu.



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Processing Steps Screen Shots Approve Reported Absences Step 2: Aurelia Havisham Click for Instructions A list of the employees for whom you are the designated manager Customize | Find | View All | # First 1.22 of 22 1.21 appears. Status Dept ID Dept Name 800000000 0 Sub Pocket,Herbert A Active 10356 IT-Training 0420 Info Tech Consultant 12 Mo Full-Time Pirrip, Philip By default, the list is sorted by the 800000000 0 Sub Domit,Amy Active 10057 Common Management System 0420 Info Tech Consultant 12 Mo Full-Time 10057 Common Management System Nickelby, Nicholas Name field. You may click on a 800000000 0 None Pecksniff,Seth Active 10353 IT-Applications Services 0420 Info Tech Consultant 12 Mo Full-Time column name to change the sort Wilfer, Bella 800000000 0 Active 10008 IT - Adm 3312 Administrator II Full-Time Clare,Ada order. Field **Description EmpIID** The employee's Campus-Wide The column at the far right indicates whether the employee listed is a ID/Employee ID. manager and you can click on the Empl Rcd The employee record number of the icon (to view the employees position. that report to that manager. Indicates the status of the employee's Current Period Absence absence entry for the current month. Values include: The Click for Instructions • None: no absence entries have link in the header provides both been submitted. quick and detailed instructions. • Sub: the employee has submitted an absence entry. • Appr: the employee's submitted absence entries have been approved by a manager. Name The name of the employee. Status The employee's status. Dept ID The department ID to which the employee reports. Dept Name The name of the department to which the employee reports. Job Code The job code for the employee's position. Job Title The job title for the employee's position. Full/Part Time Indicates whether the position is fulltime or part-time.

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Processing Steps Screen Shots Step 3: **Approve Reported Absences** Place a check mark next to the employee(s) whose absence entries Aurelia Havisham Click for Instructions you wish to review/approve. Dept ID Dept Name <u>EmplID</u> Status Job Cod Selecting multiple employees 800000000 0 Pocket,Herbert A 10356 IT-Training 0420 from this list allows you to review 800000000 0 1038 Pirrip,Philip and approve multiple employees' 800000000 0 Dorrit,Amy 10057 Common Management System 0420 Active absences. 800000000 0 Sub Nickelby, Nicholas Active 10057 Common Management System 0420 80000000000 None Pecksniff,Seth Active 10353 IT-Applications Services 0420 8000000000 None Wilfer, Bella 10173 IT - Data Network 3312 Active 80000000000 10008 IT - Administration 3312 Clare,Ada Step 4: 800000000 0 None Dedlock, Honoria Scroll down to the bottom of the page if it is not visible. 800000000 2 None Scrooge, Ebenezer 80000000000 None Darnay, Charles Click Continue. 800000000 1 None Twist,Oliver You have the option to Select All employees who have Deselect All Continue Select All submitted absence entries at the bottom of the page.

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Processing Steps

<u>Step 5:</u>

All of the employee's absence entries with a status of "Sub" will appear.

Check the **Review Status** column for each absence entry.

A status of "Reviewed" indicates that the timekeeper has reviewed the entry for accuracy.

A status of "Needs Corr" indicates that the timekeeper has found a problem with the absence entry that the employee needs to correct.

The Review Status is not a required field for approving an absence entry. Managers may approve entries without a Review Status and/or change the Review Status.

Approve Reported Absences Aurelia Havisham Click for instructions Existing Absence Events EmoliD Rode Name Absence Name Region Date End Date Duration Unit Type Approve Review-Status 1 800000000 0 Pirrip, Philip Sick-Family Care 03/15/2011 03/15/2011 8.00 Hours Reviewed 2 800000000 0 Pirrip, Philip Vacation 03/29/2011 03/29/2011 8.00 Hours Reviewed Reviewed

Field	Description
EmplID	The employee's Campus-Wide ID/Employee ID.
Rcd#	The employee record number of the position.
Name	The name of the employee.
Absence Name	The type of absence.
Begin Date	The starting date of the absence.
End Date	The ending date of the absence.
Duration	The duration of the absence.
Unit Type	What unit the duration is in (i.e. Hours, Days, etc).
Approve	Allows manager to place a check mark to mark the absence entry as approved.
Review Status	Indicates whether the absence entry has been reviewed by either the timekeeper or the manager. Values include Reviewed or Needs Corr. The status may also be blank.
Entry Comments	Indicates if there are any comments associated with the leave.
Add Comment	Allows manager to add a comment.

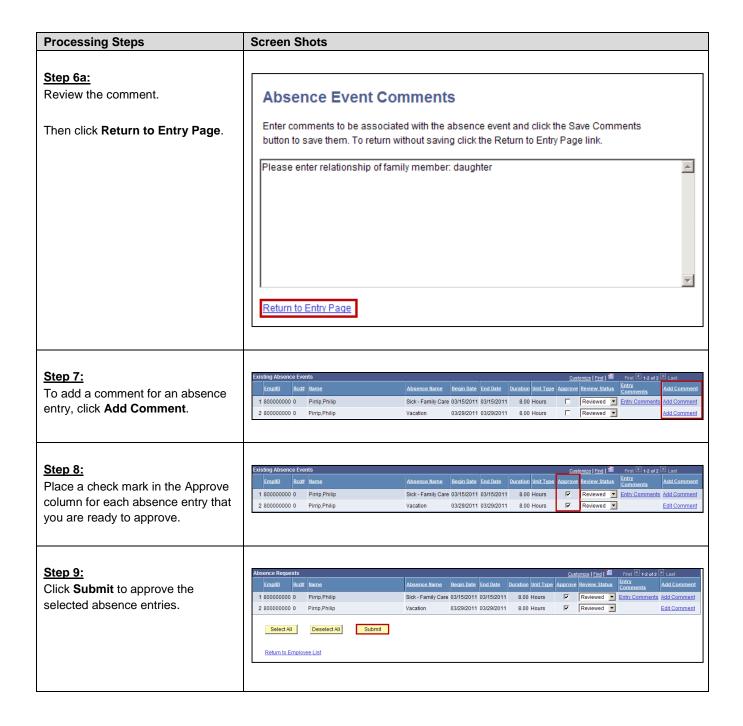
Step 6:

If there are comments for an absence entry, click **Entry Comments**.

Comments in the Entry
Comments field were entered by
the employee. Comments in the
Add Comment field were entered by
either the timekeeper or the
manager.



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Processing Steps Screen Shots Step 10: You will receive a confirmation Approval Confirmation message indicating that the absence entries were approved. Two Absence Events were approved and any Review Status changes were saved. Click OK. All the Absent Events from your selection have been approved. You will now be returned to the Approve Reported Absences page. OΚ Step 10a: If you did not approve all absence 1 800000000 0 Pocket,Herbert A Sick - Family Care 02/09/2011 02/09/2011 4.00 Hours entries for the employee, you will be Select All Deselect All returned to the Approve Reported Absences page for the employee. Return to Employee List Click Return to Employee List to approve absence entries for another employee. Step 11: **Approve Reported Absences** You are now viewing the employee Aurelia Havisham Click for Instructions In the Current Period Absences column, Appr now appears for the <u>EmplID</u> Status Dept ID Dept Name Job Cod employee whose absence entries were just approved. 0 000000008 Pocket,Herbert A Active 10356 IT-Training 0420 Pirrip,Philip Active 10356 IT-Training Appr 0 000000008 0420 Dorrit,Amy Active 10057 Common Management System You can now continue approving 0 000000008 Sub 10057 Common Management System Nickelby, Nicholas Active absences or log out (see section 1). 8000000000 None 10353 IT-Applications Services 0420 Pecksniff.Seth Active 8000000000 10173 IT - Data Network 3312 None Wilfer.Bella Active 80000000000 None Clare,Ada Active 10008 IT - Administration 3312

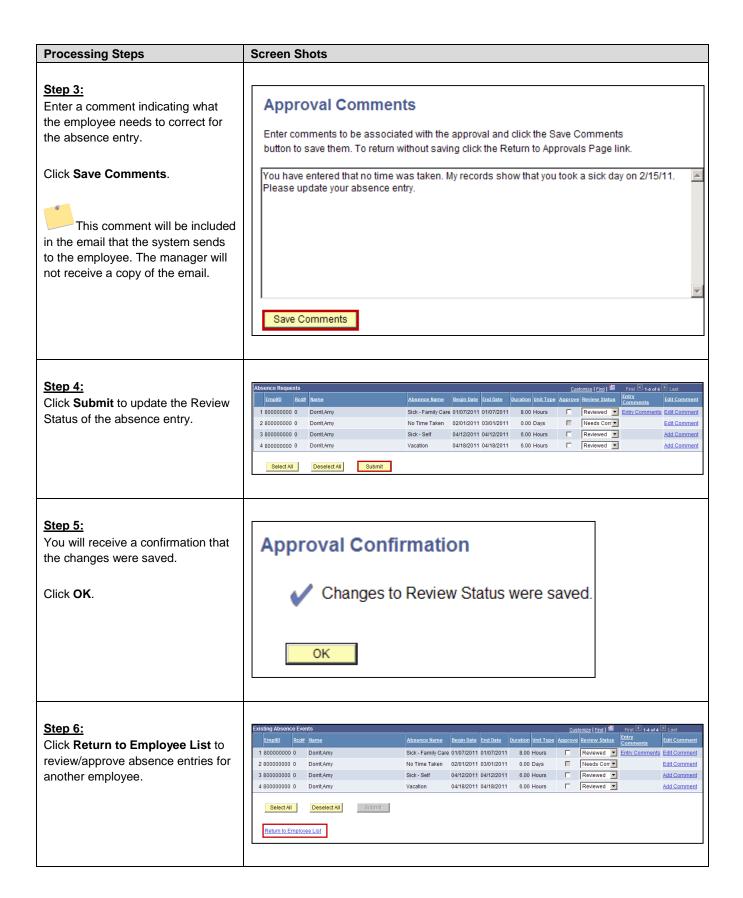
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Processing Steps Screen Shots Approving An Absence With "Needs Corr" As 1 800000000 0 Pocket,Herbert A Sick - Family Care 02/09/2011 02/09/2011 4.00 Hours **Review Status** Select All Deselect All The "Needs Corr" review status is Return to Employee List used when the timekeeper finds a discrepancy between the absence entry and his/her records. Managers have the authority to change the review status and approve these absence entries. Step 1: If the Review Status of an absence entry is "Needs Corr," first check with the timekeeper to ensure that the required correction was completed. Step 2: Customize | Find | First 1 of 1 Select **Reviewed** from the drop Entry down menu in the Review Status Duration Unit Type Approve Review Status Comments column. 4.00 Hours Needs Corr ▼ **Entry Comments** Needs Corr Reviewed Step 3: You can now place a check mark in Sick - Family Care 02/09/2011 02/09/2011 4.00 Hours the Approve column for the Select All Deselect All Submit absence entry. Then click Submit. To mark all absence entries on the page as Approved, click Select All.

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Processing Steps Screen Shots Step 4: Approval Confirmation You will receive a confirmation that the absence entries were approved. One Absence Event was approved and any Review Status changes were saved. Click **OK** to return to the employees All the Absent Events from your selection have been approved. You will now be returned to the Approve Reported Absences page. 0K **Returning An Absence** Duration Unit Type Approve Review Status **Entry For Correction** П 8.00 Hours If there is an error in an absence entry that needs to be corrected 0.00 Days before you can approve it, you can Needs Corr return the entry to the employee for Reviewed 6.00 Hours correction. Step 1: Select **Needs Corr** from the drop down menu in the Review Status column for the absence entry that needs correction. Step 2: Entry Unit Type | Approve | Review Status **Edit Comment** Click Add Comment to add a Comments comment for the entry that needs П Hours Entry Comments Edit Comment correction. Days \Box Needs Corr ▼ Add Comment Hours Reviewed Add Comment

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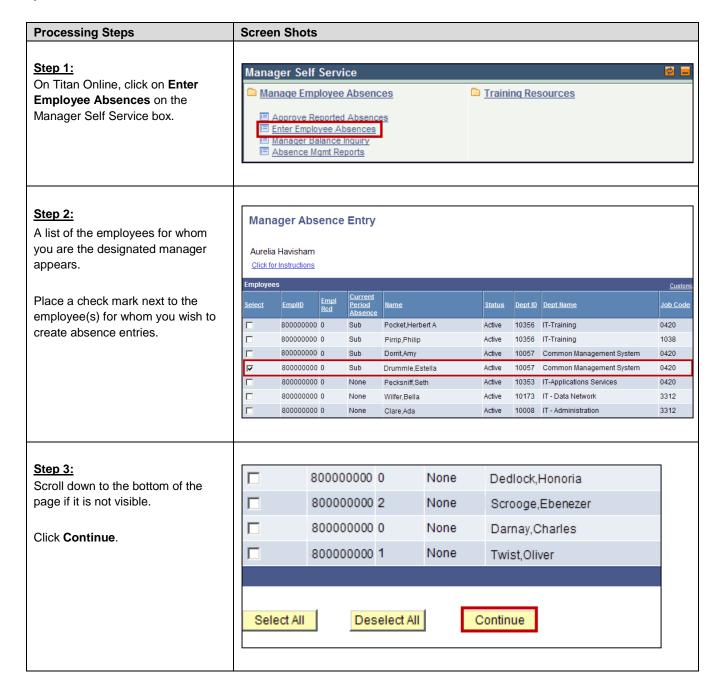


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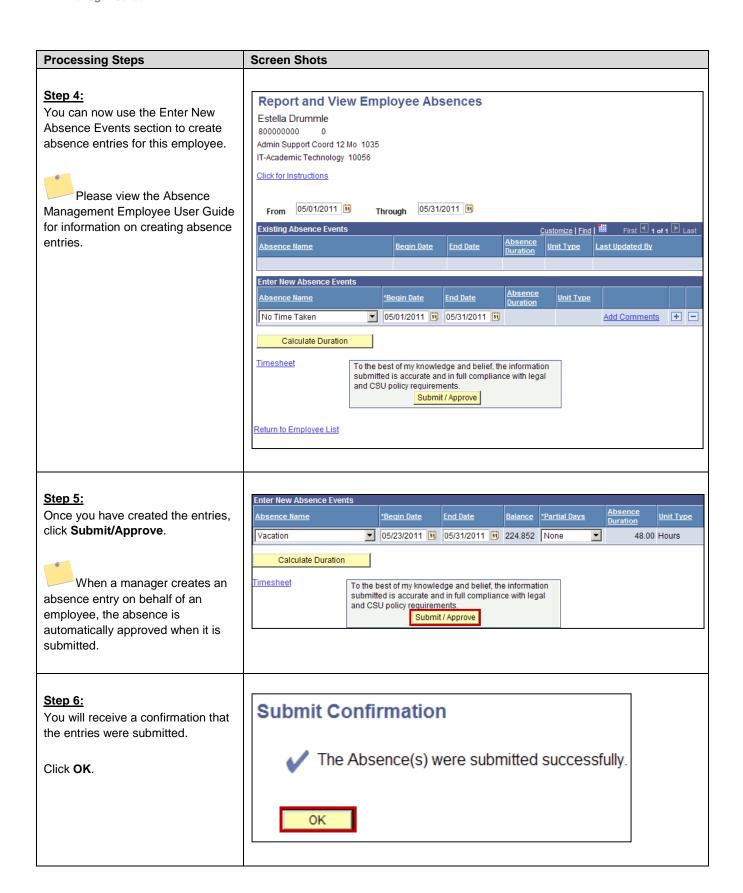
3.0 Entering Absences on Behalf of an Employee

Managers can use the Manager Absence Entry feature to enter absences on behalf of an employee.

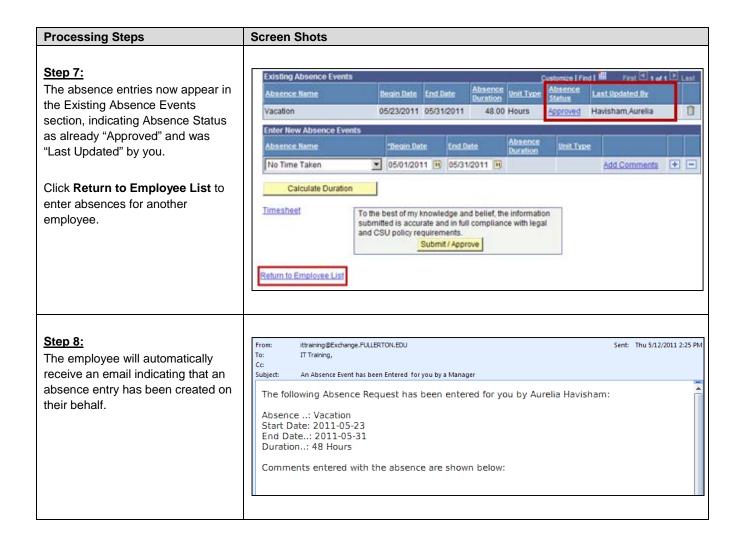
If a timekeeper or manager enters absences on behalf of an employee, a signed CMS 634 Form must be submitted to Payroll.



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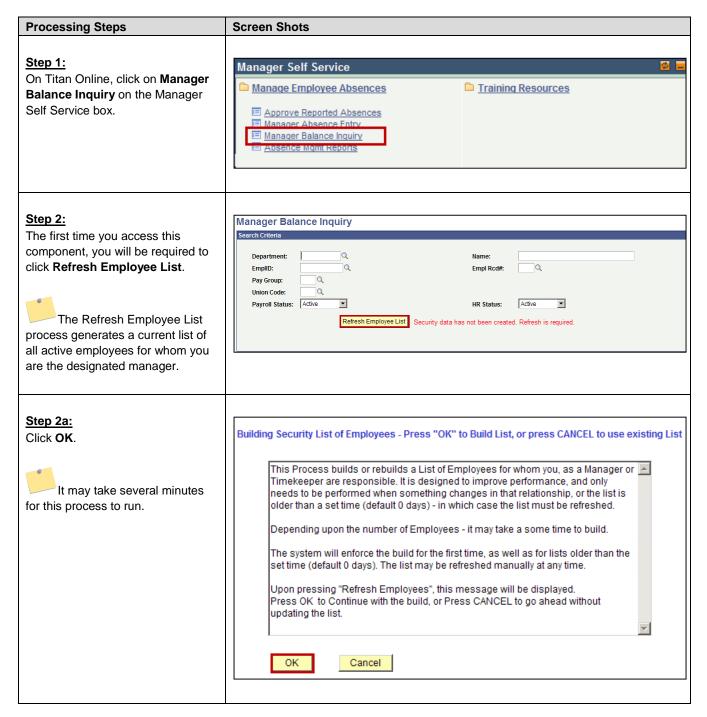
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4.0 Manager Balance Inquiry

Managers can view employee absence/leave balances using the Manager Balance Inquiry functionality.



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Processing Steps	Screen Shots
Step 3: Check the Last Refresh date. If it is more than 5 days in the past, click Refresh Employee List. If not, continue to the next step.	Manager Balance Inquiry Search Criteria Department: Q Name: EmpIID: Q EmpI Rcd#: Q Pay Group: Q Union Code: Q Payroll Status: Active HR Status: Active Active Last Refresh was: 05/12/11
Step 4: The following search criteria are available: Department Name EmplID Empl Rcd# Pay Group	Manager Balance Inquiry Search Criteria Department: 10057
Union CodePayroll StatusHR Status Enter the search criteria you wish to	
use. Then click Search .	
You may opt to leave the search criteria blank to view all employees, but you should leave both the Payroll Status and HR Status as Active.	

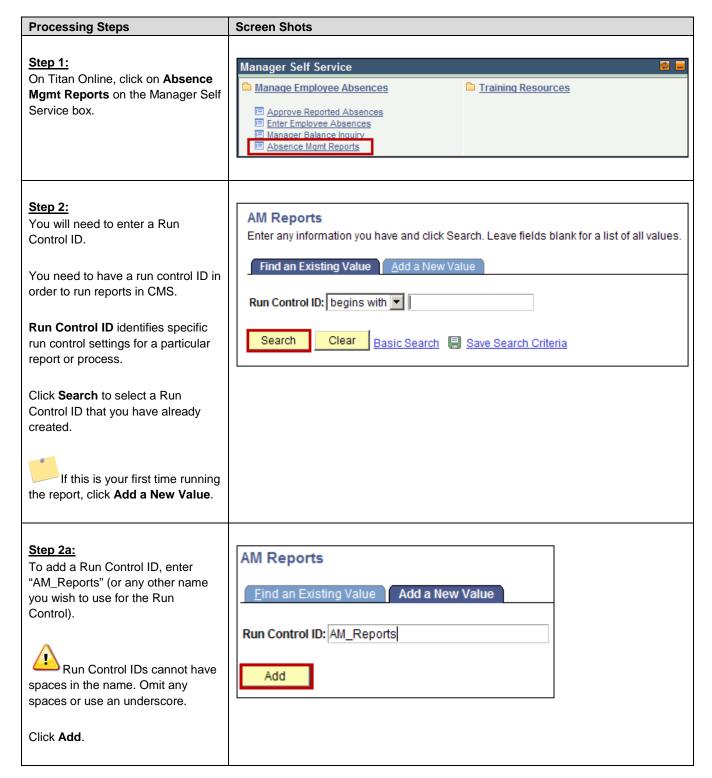
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Processing Steps Screen Shots Step 5: The search results appear. There are three tabs of information 1 Dorrit,Amy Active 800000000 02/01/2011 on this screen: Absence Balances Sick, Vacation, and Personal Holiday balances • Compensatory Time CTO, Holiday Credit, Holiday CTO, Excess, and ADO balances State Service for Absence State Service, State Service Carryover, Sick Carryover, Vacation Carryover, and State FTE Carryover amounts Click on a tab to view it or to view all of the available information on one page, click the Show all columns icon (EEE). Step 6: To view additional details on the balances, click the Details icon 1 Dorrit,Amy Active 800000000 **Absence Balance Details** Step 6a: EmplID: 800000000 Amy Dorrit Empl Rcd#: Last Period Finalized: 2011-01 The employee's balance details Department: 10057 Union Code Payroll Status: appear. ▶ All Absence Balances Absence Balances Customize | View All | First 1-3 of 3 ▶ Last You can review all of the details on this page by selecting the arrow 1 2011-02 CURRENT - Not Finaliz 0.000 0.000 174.000 icon () next to All Absence 2 2011-01 02/01/2011 168.000 6.000 0.000 168.000 0.000 174.000 3 CONVERSION CONVERSION (01/02/2011) 0.000 0.000 0.000 168.000 0.000 168.000 Balances. When you are finished reviewing this page, click Return. Return

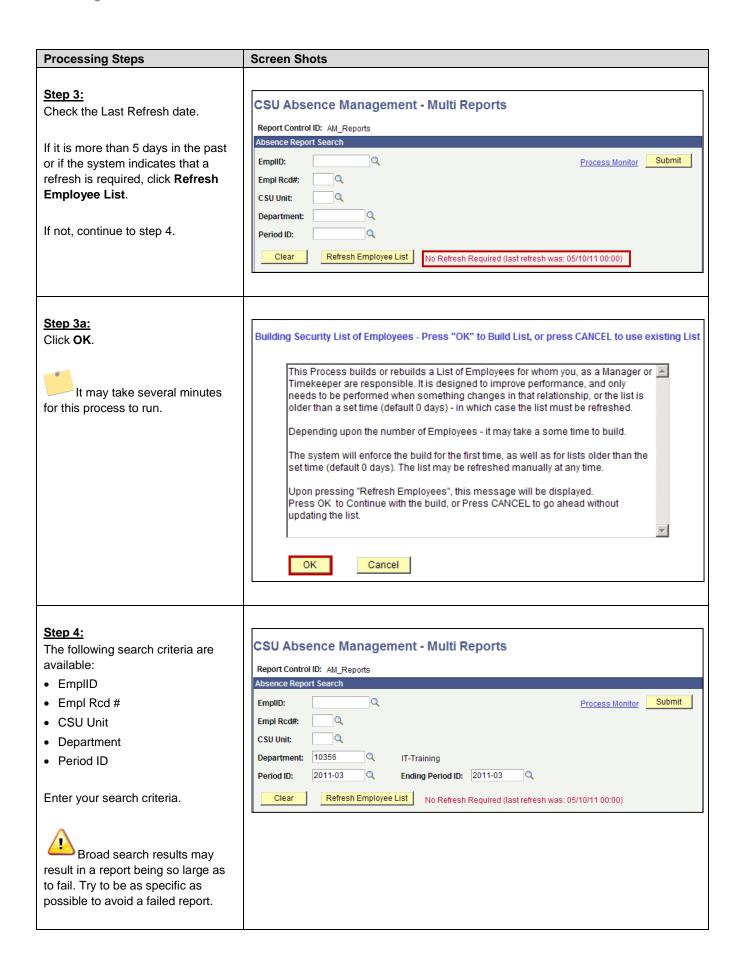
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5.0 Absence Management Reports

Managers can run several queries and reports on Absence Management.



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Screen Shots Processing Steps Step 5: Report Control ID: AM_Reports Click on the name of the report you Absence Report Search wish to run. Q EmplID: The available reports are: Empl Rcd#: · Absence Activity - Lists all absence-related Q CSU Unit: activity (including entitlements, usage, adjustments, and 10356 Department: Q IT-Training balances) for each employee during the period(s) selected. 2011-03 Q 2011-03 Q Period ID: Ending Period ID: • Absence Adjustment Refresh Employee List Clear - Lists all of the absence No Refresh Required (last refre adjustments that have not yet been processed. * Click on hyperlink for online query reporting No Time Reported Check box(es) to include in report run - Lists all employees who have no reported time for the pay ▼ Monthly Processing period(s) selected. Select All Absence Activity • Reported Absence Not Clear All **Processed** Absence Adjustment Lists all approved absences No Time Reported that have not yet been processed by Payroll. Reported Absence Not Processed · Reported Absences П Reported Absences - Lists all reported absences for Reported Absences Not Approved all employees for the pay period(s) selected. • Reported Absences Not Save **Approved** Lists all reported absences that have not been approved by a manager. Step 6: Reported Absences Report Review the report. Click on a tab to view it or to view CSU Unit all of the available information on one page, click the Show all columns icon (III). To download the records showing on this page, click the Download To Excel icon (at the top right of the bar above the results.

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6.0 Field Definitions

The following table is a list of field names and their definitions used throughout this guide.

Field	Definition
EmplID	The employee's Campus-Wide ID/Employee ID.
Empl Rcd	The employee record number of the position.
Current Period Absence	Indicates the status of the employee's absence entry for the current month. Values include:
	None: no absence entries have been submitted.
	Sub: the employee has submitted an absence entry.
	Appr: the employee's submitted absence entries have been approved by a manager.
Name	The name of the employee.
Status	The employee's status.
Dept ID	The department ID to which the employee reports.
Dept Name	The name of the department to which the employee reports.
Job Code	The job code for the employee's position.
Job Title	The job title for the employee's position.
Full/Part Time	Indicates whether the position is full-time or part-time.
Rcd#	The employee record number of the position.
Name	The name of the employee.
Absence Name	The type of absence.
Begin Date	The starting date of the absence.
End Date	The ending date of the absence.
Duration	The duration of the absence.
Unit Type	What unit the duration is in (i.e. Hours, Days, etc).
Approve	Allows manager to place a check mark to mark the absence entry as approved.
Review Status	Indicates whether the absence entry has been reviewed by either the timekeeper or the manager. Values include Reviewed or Needs Corr. The status may also be blank.
Entry Comments	Indicates if there are any comments associated with the leave.
Add Comment	Allows manager to add a comment.

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