

# AM011: Absence Management - Employee Self-Service

#### INTRODUCTION

Absence Management was implemented on the CI campus beginning with the October 2012 pay period. During the first phase of the implementation Timekeepers, (within each campus department), input absences from employee timesheets into the Absence Management module.

Staff employees and 12-month faculty are now able to access the Absence Management Self-Service (AMSS) system, enabling employees to view their applicable vacation, sick, CTO and personal holiday balances online. AMSS allows employees to enter their absences directly into the system each month and gives them the ability to view their absence history.

#### **PEOPLESOFT PROCESSING**

# 1) CI Records Log-In

| Processing Steps  | Screen Shot   |            |
|---|---|------------|
| <ol> <li>Log into myCl using your regular<br/>sign-in information.</li> <li>Click on "Cl Records" under the<br/><i>My Links</i> section.</li> </ol> | myCl  | Hello,     |
|   | Important Information   | My Links   |
|   | Staff Student   | Webmail    |
|   | No items to display at this time.   | CI Learn   |
|   | Help  | CI Records |
|   | CI at a Glance  | CI Docs    |
| 3) Click on the "Self Service" link.  | Menu<br>Search:   |            |
|   | <ul> <li>Self Service</li> <li>Set Up SACR</li> <li>My Personalizations</li> <li>My System Profile</li> </ul> |            |

#### 2) View Balances

#### Navigation: *Main Menu > Self Service > Employee Balance Inquiry*

| Processing Steps  | Screen Shot  |
|---|--|
| <ol> <li><u>NAVIGATION</u></li> <li>Click on <i>Employee Balance</i><br/>Inquiry</li> </ol> | Employee Balance Inquiry       Report Time         Employee Absence Balance Inquiry       Report and View Absences.         Image: Report and View Absences       Image: Report and View Absences  |
| <ul><li>2) Page displays</li><li>Your name and Employee<br/>ID is displayed.</li></ul>      | Employee Balance Inquiry Lois Lane 001199758   |
| • Tab = Absence Balances  |  |
| <ul> <li>Balance as of Date: Date<br/>displayed balances were<br/>updated.</li> </ul>       | Last Finalized<br>Balances         Customize         Find   View All   (2)   #         First [1 of 1] Last           Absence Balances         CompensatoryTime         State Service for Absence         Tert           Name         Payroll         Empil)         Red         Personal<br>Nbr         Code         Balances         Sick         Vacation<br>Balance         Personal<br>Holiday         Holiday         Holiday         Personal<br>Holiday         Holiday         Holiday |
| Click on Graduated Vacation     Chart link.   | 1 Lane,Lois Active 001199758 0 640 R09 2013-02 03/01/2013 8.000 20.005 0 陆   |

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## View Balances (continued)

| rocessing Steps   | Screen Shot  |   |  |   |  |  |  |  |
|---|--|---|--|---|--|--|--|--|
| <ul> <li>Helpful grids display:</li> <li>Vacation Accrual Rates</li> </ul>  | Press Esc to Return  |   |  |   |  |  |  |  |
| <ul> <li>vacation Accrual Rates</li> <li>Maximum Vacation and</li> </ul>  | SUMMARY OF VACATION  | IARY OF VACATION ACCRUAL RATES SUMMARY OF MAXIMUM VACATION<br>AND CTO CREDITS |  |   |  |  |  |  |
| <ul><li>CTO Credits</li><li>Click on "Esc" to exit.</li></ul>   | SERVICE REQUIREMENT S*   | MONTHLY<br>VACATION<br>ACCRUAL<br>RATE  | DAYS<br>ACCRUED<br>PER YEAR  | BARGAINING UNIT<br>OR<br>CLASSIFICATION   | ANNUAL CTO<br>MAX*   | FLSA ANNUAL<br>CTO MAX**   | MAX VACATION:<br>LESS THAN 10<br>YEARS OF SERVICE  | MAX VACATIO<br>MORE THAN<br>10 YEARS<br>OF SERVICE   |
|   | 0-3 YEARS: 1 TO 36 MONTHS  | 6 2/3 HOURS   | 10   | M98   | N/A  | N/A  | 480 HOURS  | 480 HOURS  |
|   | 3-6 YEARS: 37 TO 72 MONTHS   | 10 HOURS  | 15   | M80   | N/A  | N/A  | 384 HOURS  | 440 HOURS  |
|   | 6-10 YEARS: 73 TO 120 MONTHS   | 11 1/3 HOURS  | 17   | UNIT 1  | N/A  | N/A  | 272 HOURS  | 384 HOURS  |
|   | 10-15 YEARS: 121 TO 180 MONTHS   | 12 2/3 HOURS  | 19   | UNIT 2  | 120 HOURS  | 240 HOURS  | 272 HOURS  | 384 HOURS  |
|   | 15-20 YEARS: 181 TO 240 MONTHS   | 14 HOURS  | 21   | UNIT 3  | N/A  | N/A  | 320 HOURS  | 440 HOURS  |
|   | 20-25 YEARS: 241 TO 300 MONTHS   | 15 1/3 HOURS  | 23   | UNIT 4  | 120 HOURS  | 240 HOURS  | 320 HOURS  | 440 HOURS  |
|   | OVER 25 YEARS: 301 MONTHS AND UP   | 16 HOURS  | 24   | UNIT 5  | 120 HOURS  | 240 HOURS  | 272 HOURS  | 384 HOURS  |
|   | VACATION ACCRUAL RATES FOR ELIG  |   |  | UNIT 6  | 240 HOURS  | 240 HOURS  | 272 HOURS  | 384 HOURS  |
|   |  | BLE CLASSIFIC.  | ATIONS IN  | UNIT 7  | 120 HOURS  | 240 HOURS  | 272 HOURS  | 384 HOURS  |
|   | EXECUTIVE (M98), MANAGEMENT (M80),   | 16  | 24   | UNIT 8  | 200 HOURS***   | 480 HOURS  | 272 HOURS  | 384 HOURS  |
|   | CONFIDENTIAL (C99), FACULTY (Unit 3)<br>AND ACADEMIC STUDENT (UNIT 11)   | 10  | 24   | UNIT 9  | 120 HOURS  | 240 HOURS  | 272 HOURS  | 384 HOURS  |
|   | AND ACADEMIC STODENT (ONIT TT)   |   |  | UNIT 10   | 240 HOURS  | 240 HOURS  | 272 HOURS  | 384 HOURS  |
|   |  |   |  | UNIT 11   | N/A  | N/A  | 80 HOURS   | 80 HOURS   |
|   |  |   |  | UNIT 12<br>E99  | N/A  | N/A<br>240 HOURS   | 272 HOURS  | 440 HOURS  |
|   |  |   |  |   | 120 HOURS  | 1  | 272 HOURS  | 384 HOURS  |
|   | C99         120 HOURS         240 HOURS         384 HOURS         384 HOURS           *In terms of full-time service         *PER MOU/Policy         384 HOURS         384 HOURS         384 HOURS   |   |  |   |  |  |  |  |
|   | 01/28/2011 Updated/HBM   |   |  | "PURSUANT TO FA   |  | VDARDS ACT   |  |  |
|   | 01/28/2011 Updated/HRM   |   |  | "PURSUANT TO FA<br>"REFER TO APPRO  |  | NDARDS ACT   |  |  |
| • The tabs at the top of the page will display <i>Compensatory Time</i> (CTO) or  | 01/28/2011 Updated/HRM   |   | Bala<br>e for Absence  | ***REFER TO APPRO   | DPRIATE MOU  | NDARDS ACT   | ₽₽  🗯 First  |  |
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| <ul> <li>page will display<br/><i>Compensatory Time</i> (CTO) or<br/><i>State Service</i> balances.</li> <li><b>Details:</b> By clicking on the<br/>icon at the end of the row,<br/>you can view historical details<br/>on accrual rates and absence</li> </ul> | Disence Balances Compensatory Time<br>Hame Payroll<br>Status<br>I Lane,Lois Active C<br>Absence Balance Details<br>EmplID: 001199758 Lois Lar<br>Department: 640 Technol<br>Vali Absence Balances<br>Sick Vecation Personal Holiday<br>Period ID Balances as of<br>1 2013-03 CURRENT - N<br>2 2013-02 03/01/2013   | e<br>cro Holida   | Bala Bala Bala Bala Bala Bala Bala Bala                            |   | Customize<br>Last Balance<br>sized as of Data<br>as of Data<br>13-02 03/01/20<br>0<br>R09<br>1.7 of 7 L<br>AD0 No<br><u>AD0 No</u><br><u>5 Sick Taken</u><br>0 8.000<br>0 8.000  | Eind View All<br>Sick<br>Balance<br>113 8.000<br>Last Period<br>Payroll Sta<br>ast<br>in Exp AD 0 S<br>Sick Adjust<br>0.00<br>0.00   | k Vacation<br>Balance<br>0 20.005<br>I Finalized: 2013-<br>tus: Active<br>State Service ()<br>ed <u>Catastrop</u><br><u>Sick Bonst</u><br>00 0.0   | Personal<br>Holiday<br>Available<br>02<br>02<br>03<br><u>Nec</u> <u>Sick Balar</u><br>00 0.0.0   |
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| <ul> <li>page will display<br/><i>Compensatory Time</i> (CTO) or<br/><i>State Service</i> balances.</li> <li><b>Details:</b> By clicking on the<br/>icon at the end of the row,<br/>you can view historical details<br/>on accrual rates and absence</li> </ul> | Deence Balances Compensatory Time<br>Hame Payroll<br>Status<br>I Lane,Lois Active C<br>Absence Balance Details<br>EmplD: 001199758 Lois Lar<br>Department: 640 Technol<br>CALI Absence Balances<br>Sick Vacation Personal Holiday<br>Period 10 Balances as co<br>1 2013-03 CURRENT - N<br>2 2013-02 03/01/2013<br>3 2013-01 01/31/2013   | e<br>cro Holida   | Bala Bala Bala Bala Bala Bala Bala Bala                            |   | Customize           Last         Balance           as of Dai           ericd         as of Dai           13-02         03/01/20           a         5/01/20           a         5/02/20           a         8/000           a         8/000           a         8/000           a         6/000  | I <u>Find</u> View All<br>s <u>Sict</u><br>Balance<br>13 8.000<br>Last Period<br>Payroll Sta<br>ast<br>on Exp AD 5<br><u>Sick Adjust</u><br>0.00<br>0.00<br>0.00   | k Vacation<br>Balance<br>0 20.005<br>I Finalized: 2013-<br>tus: Active<br>State Service<br>Catastrop<br>Size Donat<br>00 0.0<br>00 0.0   | Holday<br>Available         Deta<br>Provide           02         Provide           02         Provide           02         Provide           00         0.0           00         0.0           00         8.0           00         0.0           00         0.0  |
| <ul> <li>page will display<br/><i>Compensatory Time</i> (CTO) or<br/><i>State Service</i> balances.</li> <li><b>Details:</b> By clicking on the<br/>icon at the end of the row,<br/>you can view historical details<br/>on accrual rates and absence</li> </ul> | Desence Balances     Compensatory Time       Hame     Payroll       Lane,Lois     Active       Absence Balance Details       EmplD:     001199758       Lois Lar       Department:     640       Vecation     Personal Holiday       Period ID     Balances       Sick     Vecation       Period ID     Balances as co       1     2013-03       CURRENT - N     2       3     2013-01       01/3/12013     01/3/12013       4     2012-12 | e<br>cro Holida   | Bala Bala Bala Bala Bala Bala Bala Bala                            |   | Customize<br>Last Balance<br>eriod as of Dai<br>eriod as of Dai<br>13-02 03/01/20<br>0<br>13-02 03/01/20<br>0<br>14-00 NG<br>1-7 of 7 L<br>ADO NG<br>0 8.000<br>0 8.000<br>0 0.000<br>0 0.000<br>0 16.000<br>0 8.000   | Find     View All       is     Sici       te     Balance       13     8.001       Last Period       Payroll Sta       ast       in Exp AD 0       Sick Adjust       0.00       0.01       0.01       0.01       0.01       0.01       0.01 | Vacation<br>Balance           0         20.005           I Finalized:         2013-<br>tus:           Active         Image: Catastropp<br>Sick Donat<br>00           0         Catastropp<br>Sick Donat<br>00           00         0.0           00         0.0           00         0.0           00         0.0           00         0.0           00         0.0           00         0.0 | Personal<br>Holiday Deta<br>Available<br>0<br>02<br>02<br>00<br>00<br>00<br>00<br>00<br>00<br>00<br>00<br>00<br>00<br>0  |

## 3) Absence Reporting

# Navigation: *Main Menu > Self Service > Time Reporting > Report Time > Report and View Absences*

| Processing Steps   | Screen Shot   |
|--|---|
| <ol> <li>NAVIGATION         <ul> <li>Be sure that you click on</li></ul></li></ol> | Favorites       Main Menu >       Self Service         Main Menu >       Self Service         Navigate to your selfservice information and activities.       View Time         Employee Balance Inquiry       Report Time         Employee Absence Balance Inquiry       Report your time and request planned overtime and absences.       View Time         Image: Report and View Absences       Northly Schedule |

| Processing Steps  | Screen Shot   |
|---|---|
| <ul> <li><b>1)</b> <u>REPORTING ABSENCES</u></li> <li>Note that your name,<br/>Employee ID, Job Title and<br/>Department are listed at the<br/>top of the page.</li> <li>Make sure that the "From"<br/>and "Through" dates display<br/>the pay period in which you<br/>wish to enter your absences.<br/>(Refer to the CI Payroll<br/>Schedule on the Payroll<br/>Services website for exact pay<br/>period dates.)</li> </ul> | Favgrites       Main_Menu 2       Self Service 2       Time Reporting 2       Report_Time 2       Report and View Absences         Approx       0       Info Tech Consultant 12 Mo 0420       Technology & Communication 640         Click for Instructions       Customize       Find [04/01/2013] 10         From       04/01/2013 10       If 04/30/2013 10         Existing Absence Events       End Date       End Date         Absence Name       Begin Date       End Date       Unit Type         Link and View Absence Events       Begin Date       End Date       Date         Absence Name       Begin Date       End Date       Date       Date       Date         Calculate Duration       To the best of my knowledge and belief, the information submitted is accurate and in full compliance with legal and CSU policy reguirements.       Submit  |
| <ul> <li>Enter New Absence Events</li> <li>Absence Name: Click on the drop-down triangle.</li> <li>A list of absence types will display.</li> <li>Select the Absence that you are reporting.</li> <li>Campus Holidays: Do not report holidays that are posted on the Payroll Calendar. These holidays are already built into the system. Only report if you worked on a campus holiday.</li> </ul>                            | Enter New Absence Events          Absence Name       1Begin Date       1End Date       Date       Unit Type         Invalid Value)       Image: Constraint of the second |
| <ul> <li>Note that when you exit the field, the balance for that leave type appears.</li> <li>A new field, "Partial Days" also displays. Use this field to identify when an absence taken was not for a full, scheduled day.</li> </ul>   | Enter New Absence Events       Absence Name     Begin Date     End Date     Balance     Partial Days     Absence Unit Type       Vacation     04/01/2013     04/01/2013     12.005     None     Hours     Add Comments  |

# Absence Reporting (continued)

| <ul> <li>Begin Date: Enter the date you're the absence began.</li> <li>End Date: Notice that this field automatically populates with the same date as the <i>Begin Date.</i> Enter the appropriate end date if the absence was more than one day.</li> <li>Balance: Verify that you have enough hours to cover the absence that you are reporting.</li> </ul>  | Enter New Absence Events          Absence Name       *Begin Date       *End Date       Balance       *Partial Days       Absence Absence         Vacation       04/05/2013       04/05/2013       12.005       None       Image: None |
|--|---|
| <ul> <li>Partial Days: Click on the drop-down triangle.</li> <li>If you are reporting an absence that is for less than a full day off, click on "Partial Hours".</li> <li>If you are reporting one or more full day(s) off, then leave the value at "None".</li> <li>Note: Exempt employee should not report any partial days off.</li> <li>If you select "Partial Hours" a new field will display: <i>Hours per Day</i></li> <li>Hours per Day: Enter the number of hours you were absent.</li> </ul> | Enter New Absence Events         Absence Name       *Begin Date       *End Date       Balance       *Partial Days       Abser<br>Duration         Vacation       04/05/2013       12.005       None       None       None         Calculate Duration       Partial Hours       Partial Hours       None         *Begin Date       *End Date       Balance       *Partial Days       Hours         *Begin Date       *End Date       Balance       *Partial Days       Hours         04/05/2013       04/05/2013       12.005       Partial Hours       4  |
| <ul> <li>Click on the Calculate<br/>Duration button.</li> <li>Validate that the Absence<br/>Duration is the number of<br/>hours that you wish to report<br/>as an absence.</li> </ul>  | Enter New Absence Events         Absence Name       *Begin Date       *End Date       Balance       *Partial Days       Hours<br>per Day       Absence       Unit Type         Vacation       04/05/2013       04/05/2013       12.005       Partial Hours       4.00       4.00       Hours         Calculate Duration   |
| <ul> <li>To add another absence, click<br/>on the "+" button at the far<br/>right end of the row.</li> <li>Continue to add new rows<br/>until all absences are<br/>recorded.</li> </ul>  | Enter New Absence Events     Hours     Absence Image Partial Days     Hours     Absence Unit Type       Absence Name     *Begin Date     *End Date     Balance     *Partial Days     Hours     Absence     Unit Type       Vacation     • 04/05/2013     13     12.005     Partial Hours     4.00     4.00     Hours     Add Comments   |

| Processing Steps   | Screen Shot  |
|--|--|
| <ul> <li>Review your information carefully. If they are correct, click the <b>Submit</b> button.</li> <li><b>IMPORTANT:</b> Clicking the submit button is equal to signing your timesheet and certifies that you are reporting compliant and accurate monthly absences.</li> </ul> | From 04/01/2013 33         Through 05/30/2013 33         Existing Absence Events         Absence Iname         Begin Date       End Date       First = 1 of 1 = Last         Absence Events         Absence Events         Absence Events         Absence France       1 Begin Date       Find Date       Partial Days       Hours a Absence Unit Type         Vacation       04/05/2013 13       04/05/2013 12.005       Partial Days       Hours a Add Comments         Vacation       04/05/2013 13       04/05/2013 13       000       4.00       4.00       Hours Add Comments         Vacation       04/05/2013 13       04/15/2013 13       000       Add Comments         Calculate Duration       To the best of my knowledge and belief, the information submitted is accurate and in full compliance with legal and CSU policy requirements.       Submit         Submit  |
| <ul> <li>You should receive this confirmation.</li> <li>Click "OK"</li> </ul>  | Submit Confirmation<br>The Absence(s) were submitted successfully.<br>OK   |
| • Your absences move into the <i>Existing Absence Events</i> section.  | Report and View Absences         Lois Lane         001199758         0         Info Tech Consultant 12 Mo         0420         Technology & Communication         640         Click for Instructions   |
|  | From       04/01/2013       Through       05/30/2013         Existing Absence Events       Customize       End       Image: First       First       1.2 of 2       Last         Absence Name       Begin Date       End Date       Absence Unit Type       Absence Last Updated By       Image: First   |
| <ul> <li>CORRECTING ABSENCES</li> <li>Once an absence has been submitted it cannot be changed. The only way to edit the information is to delete the incorrect row, and resubmit a new absence.</li> <li>To Delete Row: Click on the</li> </ul>                                    | Existing Absence Events       Customize   Find   Image: First Image: Fi |
| • To Delete Row: Click of the trash can icon on the far right of the row.  |  |

## Payee Messages (continued)

| Processing Steps  | Screen Shot  |
|---|--|
| <ul><li>You should receive this confirmation.</li><li>Check the appropriate box.</li></ul>                  | Confirm Delete            ✓         Click Yes to Delete this Absence Event         Absence: Vacation Begins: 4/5/2013 Ends: 4/5/2013          Yes       No   |
| <ul> <li>Add a Row: Re-enter the correct absence(s).</li> <li>Submit: Click on button to submit.</li> </ul> | Existing Absence Events         Absence Name       Begin Date       End Date       Absence       Last Updated By         Vacation       04/15/2013       04/15/2013       8.00       Hours       Submitted       Lois Lane         Enter New Absence Events       Begin Date       *End Date       Balance       *Partial Days       Hours       Absence       Unit Type         Vacation       04/05/2013       04/05/2013       4.005       Partial Hours       2.00       2.00       Hours         Calculate Duration       To the best of my knowledge and belief, the information submitted is accurate and in full compliance with legal and CSU policy requirements.       Submit |

#### 4) View Monthly Schedule

#### Navigation: *Main Menu > Self Service > Time Reporting > View Time > Monthly Schedule*

| Processing Steps   | Screen Shot  |
|--|--|
| This is a good tool to see what<br>work schedule is assigned to<br>you, and which absences have<br>been submitted. | Main Menu >         Self Service         Navigate to your selfservice information and activities.         Employee Balance Inquiry         Employee Absence Balance Inquiry         Report your time and request planned overtime and absences.         Report and View Absences         Report and View Absences         Monthly Schedule |

