

# Absence Management Manager Absence Self Service

### **OBJECTIVE:**

The Manager Self Service Absence Entry Business Process Guide is to help managers navigate in Absence Management to enter or approve monthly absences for their employees as applicable by the MOU.

### **CONTENTS:**

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#### **NEED ADDITIONAL INFORMATION?**

For further questions on this process please go to the CMS webpage at <u>http://www.sonoma.edu/cms/contact.shtml</u>

> to locate the **PAYROLL AND BENEFITS FUNCTIONAL LEAD** under HRIS.

Payroll and Benefits http://www.sonoma.edu/payroll/selfservice/index.html Last Update: 1/18/11



### **Lesson 1: Approve Reported Absences**

# Navigation: Manager Self Service>Time Management>Approve Time and Exceptions> Approve Reported Absences

#### Introduction:

Managers must approve all absences and no time taken entries for their employees. This can be done throughout the month, or on an as needed basis. It is important to recognize that the approvals must be done prior to the Payroll and Benefits deadline. Please adhere to any deadlines to ensure timely processing for all employees on campus.

On the approval page, a manager can:

- approve employee absence entries
- change the status to "needs correction" so the employee can delete and re-enter the absence as needed
- change the status to "reviewed" to keep the entries on the screen for the month in preparation for approving as a group

#### **Approve Reported Absences**

Step	Action	Screenshot
1	Navigate to Manager Self Service>Time Management> Approve Time and Exceptions>Approve Reported Absences	Menu       Image: Search:         Image: Search:       Image: Search:



2a	At the employee selection page: Check the boxes in the "Select" column for the employee(s) to view absences or	Employees Select
2b	Click on the "Select All" button to view absences for all employees listed.	Select All
3	Select Continue	Continue
4a	Select the approve checkbox to approve the absence. or	
4b	Click on the "Select All" button to approve all absence entries.	Select All
5	To Change the Review Status select from the drop down.	Review Status Needs Corr Reviewed



5a	Selecting "Needs Corr" will notify the employee via e-mail that the entry needs to be corrected.	The following Absence Request has been marked "Needs Correction" by Absence: Sick Take - Family Start Date: 2010-03-12 End Date: 2010-03-12 Duration: 3.5 Hours Comments associated with the review:
5b	Selecting "Reviewed" will keep the absence showing on this page for future reference, but will not approve the absence. It will also change the entry status so that it cannot be changed by the employee.	
6	To Submit Approvals or Status Changes, click Submit	Submit
7	An approval confirmation will appear, select ok.	Approval Confirmation <ul> <li>1 Absence Event was approved and any Review Status changes were saved.</li> </ul>



### Lesson 2: Report Absences for an Employee

Navigation: Manager Self Service>Time Management>Report Time>Manager Absence Entry

#### Introduction:

There are situations where an entry would need to be made on the employee's behalf. Some examples are:

- 1. When the employee is unavailable to enter their absences prior to the deadline
- 2. When the employee is unavailable to fix an entry that was put into needs correction status prior to the deadline

Managers enter absences using the Absence Management manager self service page. The entry automatically goes into approved status and is not able to be edited by the employee. A system generated e-mail is sent to the employee to let them know an absence has been entered on their behalf. Managers who enter absences on behalf of an employee must also submit the absence authorization form (STD 634) signed by the manager (approver) and indicate 'unavailable for signature' in the employee signature field.

#### Manager Absence Entry

Step	Action	Screenshot
1	Navigate to Manager Self Service>Time Management>Report Time>Manager Absence Entry	<ul> <li>✓ Manager Self Service</li> <li>◇ Time Management</li> <li>▷ Approve Time and Exceptions</li> <li>✓ Report Time         <ul> <li>← Manager Absence Entry</li> </ul> </li> <li>Manager Absence Entry</li> </ul>



2	At the employee selection page select an employee by clicking on the Employee ID	Employees   Emplid   00   00   00   00   00   00   00   00
3	At the page entry, the Absence Name defaults to "No Time Taken". The Begin and End Dates default to the current Absence period.	Enter New Absence Events     Absence II       Absence II     Besin Date     End Date     Absence II       No Time Taken     11/01/2009     12/01/2009     Days     Add Comments
4	Select the Absence Name from the drop down menu.	Enter New Absence Events         Absence Hame       Begin Date       End Date       Balance       *Partial Days         Vacation Take       11/01/2009       11/01/2009       47.5       None
5	Select the Begin and End Dates.	Enter New Absence Events       Absence Hame     Begin Date     End Date     Balance     *Partial Days       Vacation Take     11/01/2009     11/01/2009     47.5     None
6	To enter Partial Days, select Partial Hours from the drop down and enter the appropriate hours in the "Hours Per Day" field.	Enter New Absence Events           Absence Name         Begin Date         End Date         Balance         'Partial Days         Hours per Day           Vacation Take         11/11/2009         11/12/2009         47.5         Partial Hours         4.00



7	Click on the "Calculate Duration" button and validate that the correct number of hours are displayed in the "Absence Duration" field.	Enter New Absence Events Absence Itame Begin Date End Date Balance Partial Dave Der Day Duration Vacation Take 11/11/2009 11/11/2/2009 11/12/
8	To enter another absence, click on the plus (+) button to add a row and continue as instructed above until all absences have been entered.	Enter New Alternice Svering Alternice Swering Vacation Take v 111112000 1 11112000 2 47.5 Partial Hours v 4.00 8.00 Hours Add Comments 1 v acation Take v 111112000 1 111012008 5 47.5 Partial Hours v 4.00 8.00 8.00 Hours Add Comments 1 v 110112000 1 111012008 5 10 1000 1 10000 1 1000 1 1000 1 10000 1 10000 1 1000
9	If you enter a plus (+) row in error, click on the minus (-) button on the row you want deleted (prior to submitting).	Enter New Absence Events Absence Rame Vacation Take v Ent Total 11/1/2/2008 v 47.5 Partial Hours v 4.06 8.00 Hours 3012 Commerce v 11/01/2/2008 v 11/01/2/2008 v 47.5 Partial Hours v 4.06 8.00 Hours 3012 Commerce v 11/01/2/2008 v 11/01/2008 v 11/0
10	Review the information carefully and click on the "Submit" button to submit an absence for approval.	To the best of my knowledge and belief, the information submitted is accurate and in full compliance with legal and CSU policy requirements. Submit
11	Click "Ok" on the confirmation page.	Submit Confirmation ✓ The Absence(s) were submitted successfully.





12	An e-mail is automatically sent to the employee letting them know an absence has been entered on their behalf.	The following Absence Request has been entered for you by Absence: Vacation Take Start Date: 2010-03-16 End Date: 2010-03-16 Duration: 8 Hours Comments entered with the absence are shown below:
13	To select another employee, select either "Return to Employee List", "Previous Employee in List" or "Next Employee in List".	<u>Return to Employee List Previous Employee In List Next Employee In List</u>



### Lesson 3: Deleting Absences Reported for an Employee

# Navigation: Manager Self Service>Time Management>Report Time>Manager Absence Entry

#### Introduction:

There are situations where an entry would need to be deleted and re-entered correctly. Some examples are:

- 1. When the employee notifies the manager that an entry that has been submitted on their behalf is incorrect
- 2. When the employee is unavailable to fix an entry that was put into needs correction status
- 3. When the manager submits an entry in error

#### **Deleting Absence Entries Reported for an Employee**

Step	Action	Screenshot
1	Navigate to Manager Self Service>Time Management>Rep ort Time>Manager Absence Entry	<ul> <li>✓ Manager Self Service</li> <li>✓ Time Management</li> <li>▷ Approve Time and Exceptions</li> <li>✓ Report Time         <ul> <li>Manager Absence Entry Absence entry for managers</li> </ul> </li> </ul>
2	At the employee selection page select an employee by clicking on the Employee ID	Emplid Emplid   00 0   00 0   00 0   00 0   00 0   00 0   00 0



3	Select the From and Through dates	From 03/01/2010 🗐 Throug	ıh 03/31/2010 🛐
4	Absences that have not been approved or reviewed can be deleted by clicking on the	Existing Absence EventsAbsence NameBegin DateEnd DateAb DuSick Take - Self03/29/201003/29/2010Furlough Day Take02/19/201002/19/2010	Customize   Find   Image: First Image:
5	If you do not see the icon next to the entry you would like to delete, contact Payroll and Benefits for further instruction.	Existing Absence EventsAbsence NameBegin DateEnd DateAtSick Take - Self03/29/201003/29/2010Furlough Day Take02/19/201002/19/2010	Customize   Find   III       First I 1-5 of 5 ▶ Last         bsence uration       Unit Type       Absence Status       Last Updated By         8.00       Hours       Approved       III         1.00       Days       Finalized       III
6	An e-mail is automatically sent to the employee letting them know an absence has been deleted on their behalf.	The following Absence Event has been delet Absence: CTO Take Start Date: 2010-03-09 End Date: 2010-03-09 Duration: 10 Hours	ed by



### **Lesson 4: Entering Retroactive Absences**

# Navigation: Manager Self Service>Time Management>Report Time>Manager Absence Entry

#### Introduction:

When an entry falls into a calendar month that has already been processed it requires additional steps by the Payroll and Benefits department. The entry is done as a regular absence entry, however a message will show on the screen to notify the manager that the entry falls into a closed calendar. An e-mail is generated to notify the manager that an entry was made for a closed pay period.

Please note: If the absence is more than 90 days old, an absence report representing all absences in the closed pay period must be submitted to the employee's manager for approval and then sent to Payroll and Benefits for processing. You will receive a warning to tell you that it cannot be entered through Self Service.

#### **Entering Retroactive Absences**

Step	Action	Screenshot
1	Navigate to Manager Self Service>Time Management>Repo rt Time>Manager Absence Entry	<ul> <li>✓ Manager Self Service</li> <li>◇ Time Management</li> <li>◇ Manage Schedules</li> <li>◇ Approve Time and Exceptions</li> <li>◇ Report Time         <ul> <li>← <u>Timesheet</u></li> <li>← Manager Absence Entry</li> </ul> </li> </ul>
2	At the page entry, the Absence Name defaults to "No Time Taken". The Begin and End Dates default to the current Absence period.	Enter New Absence Events           Absence         Unit Type           Absence Iteme         Beain Date         End Date         Duration           No Time Taken         11/01/2009         12/01/2009         Days         Add Comments



3 Select the Absence		Enter New Absence Events
	down menu.	Absence Name Begin Date End Date Balance Partial Days
		Vacation Take V11/01/2009 H 11/01/2009 47.5 None V
4	Select the Begin and End Dates.	Enter New Absence Events Absence Hame Begin Date End Date Balance "Partial Days
		Vacation Take 💉 11/01/2009 🖻 11/01/2009 🖻 47.5 None 🛩
5	When the dates fall into a month that has been finalized, you will receive a warning to let you know that the entry will show as an adjustment. Click "Ok" on the warning page.	Windows Internet Explorer       X         Image: Please Note: This entry fails in a prior period that has already been finalized. (27500,342)         Payroll has already finalized the calendar period in which you have made this entry. You can continue but keep in mind that Payroll will need to perform a manual adjustment to properly record your entry.         OK
6	If the entry is for an absence outside the allowable date range, a warning will show that the entry cannot be made through self service.	This absence begin date fails outside the allowable entry window of 1/1/2010 through 5/31/2010. (27500,343) Only entries for absences within this date range may be entered using self-service. If you have an entry to make that fails outside this range, please call Payroll or ask your manager.
7	To enter Partial Days, select Partial Hours from the drop down and enter the appropriate hours in the "Hours Per Day" field.	Enter New Absence Events       Absence Name     Begin Date     End Date     Balance     Partial Days     Hours per Day       Vacation Take     11/11/2009     11/12/2009     47.5     Partial Hours     4.00



8	Click on the "Calculate Duration" button and validate that the correct number of hours are displayed in the "Absence Duration" field.	Enter New Absence Events Absence Name Beam Date End Date Uslance Partial Dave Day Daration Vacation Take V 11/11/2009 H 11/12/2009 H 47:6 Partial Hours V 4.00 8.00 Calculate Duration
9	To enter another absence, click on the plus (+) button to add a row and continue as instructed above until all absences have been entered.	Enter New Absence Overfax Alexans Barry Reach Data Could Bits Enter Thillist Dave States of Contents Unit Lines Vacation Take V 1110112000 (1) 111012000 (5) 47.5. Partial Hours V 4.00 8.00 Hours Add Contents (1) 110112000 (1) 111011000 (1) 1110110000 (1) 11100000(1) 1110000(1) 1110000(1)
10	If you enter a plus (+) row in error, click on the minus (-) button on the row you want deleted (prior to submitting).	Enter New Absence Events Absence Ream Ream Proto Data End Data Events Statist Data Bank Statist Data
11	Review the information carefully and click on the "Submit" button to submit an absence for approval.	To the best of my knowledge and belief, the information submitted is accurate and in full compliance with legal and CSU policy requirements. Submit
12	Click "Ok" on the confirmation page.	Submit Confirmation ✓ The Absence(s) were submitted successfully.



13	An e-mail is automatically sent to the employee and to the Payroll and Benefits department letting them know a retroactive absence has been entered.	The following PRIOR PERIOD Absence Request has been entered by Absence: Sick Take - Self Start Date: 2010-01-05 End Date: 2010-01-05 Duration: 8 Hours Comments entered with the absence are shown below:
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### Lesson 5: Approve and Enter Direct Reports Absences

Navigation: Manager Self Service>Time Management>Approve Time and Exceptions>Approve Reported Absences -or-Manager Self Service>Time Management>Report Time>Manager Absence Entry

#### Introduction:

In a managers absence, entries still need to be approved and/or made. The security for the approval and entry pages are based on reporting structure. Therefore, if a manager is unavailable to meet the deadline, their manager can approve and enter as needed.

#### Using the Direct Reports drill down

Step	Action	Screenshot
Step 1	Action Navigate to Manager Self Service>Time Management> Approve Time and Exceptions>Approve Reported Absences -or- Navigate to Manager Self Service>Time Management>Report	✓ Manager Self Service         ▼ Time Management         ▷ Approve Time and         Exceptions         ▷ Report Time
	Time>Manager Absence Entry	



2	At the employee list select the to drill down to an employee's direct	Manager Absence Entry Manager Absence Entry Click for Instructions										
	reports	Employees					Customize   Find   View All   🛗 First 🗹 1 of 1 🕩 Last					
		<u>Emplid</u>	Empl Rcd	<u>Cur Pd</u> Abs	<u>First Name</u>	Last Name	<u>Status</u>	Department	Dept Name	Job Code	Jobtitle	
		oc	0	Sub			Active			3312	Administrator II	品
												First