ABC 2014 Fall Summit

Absence Management for Timekeepers

Absence Management Self-Service (AMSS)

September 9, 2014

abc.afd.calpoly.edu
Class Objectives

- What is Absence Management Self-Service (AMSS)?
- What are the roles and responsibilities?
- My Cal Poly Portal
- How does the system work?
- What are the monthly timekeeper activities in AMSS?
- Getting help
- Questions?
Absence Management Self Service is a CSU wide online system that allows:

- Entry of leave time earned and taken
- Hourly and premium pay requests
- Timekeeper review and reporting
- Manager approval and reporting
Roles & Responsibilities

**Employee-Self Reporter**
- Enters Absences by the first day of the following pay period

**Timekeeper/Supervisor**
- Reviews Absences submitted and recommends for approval to the manager (may also enter Absences for the dept.)

**Manager**
- Approves Absences by the third business day of the pay period

**Payroll**
- Reviews and Finalizes Absences by the 10th of the pay period

abc.afd.calpoly.edu
How to log in

- My Cal Poly Portal
- Click on Personal Info Tab
- Navigate to My Job Tasks

<table>
<thead>
<tr>
<th>My Job Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timekeeper Leave Balance Inquiry</td>
</tr>
<tr>
<td>Timekeeper Absence Review</td>
</tr>
<tr>
<td>Timekeeper Absence Entry</td>
</tr>
<tr>
<td>Review Master Payroll Certification (MPC)</td>
</tr>
</tbody>
</table>
Manager Self Service

Navigate to self service information and activities for people reporting to you.

Timekeeper Balance Inquiry
Timekeeper Absence Balance Inquiry

Approve Time and Exceptions
Approve reported or payable time, overtime and absence requests, and manage exceptions.

Report Time
Report time or request absences.

Timekeeper Absence Review
Timekeeper Absence Entry

abc.afd.calpoly.edu
Employee Tasks

- Notifications throughout the month
- Enter absence events or Docks as they occur
- Cannot enter time they don’t have
- Can submit absence events two months forward and three months back
- Prompts for extra info like relationships
- Schedules!
- ‘No Leave Taken’ requirement
- Employee views available balance at absence entry
Timekeeper Overview

- Notifications

- Timekeepers have the ability to:
  - Enter on behalf of employees
  - Mark needs correction
  - Set status as “reviewed” prior to approval
  - Review absence balances
  - Run absence reports

- Group security

- Timesheet for positive pay

- Docks – prior to Initial MPC!
Absence Review

- Automatically loads your employee list
- Select individuals or **All** and hit continue…

<table>
<thead>
<tr>
<th>Select</th>
<th>EmpID</th>
<th>Empl Rcd</th>
<th>Cur Pd Abs</th>
<th>First Name</th>
<th>Last Name</th>
<th>Status</th>
<th>Dept Name</th>
<th>Jobtitle</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>000004369</td>
<td>0</td>
<td>Sub</td>
<td>Princess</td>
<td>Ariel</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Makeup Manager</td>
</tr>
<tr>
<td></td>
<td>000018266</td>
<td>0</td>
<td>Sub</td>
<td>Princess</td>
<td>Belle</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Band Member I</td>
</tr>
<tr>
<td></td>
<td>000003797</td>
<td>0</td>
<td>Sub</td>
<td>Daisy</td>
<td>Duck</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Train Conductor</td>
</tr>
<tr>
<td></td>
<td>000011116</td>
<td>0</td>
<td>Sub</td>
<td>Donald</td>
<td>Duck</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Train Conductor</td>
</tr>
<tr>
<td></td>
<td>000004759</td>
<td>0</td>
<td>Sub</td>
<td>Princess</td>
<td>Jasmine</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Band Member II</td>
</tr>
<tr>
<td></td>
<td>000003992</td>
<td>0</td>
<td>Sub</td>
<td>Minnie</td>
<td>Mouse</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Makeup Manager</td>
</tr>
<tr>
<td></td>
<td>000006774</td>
<td>0</td>
<td>Sub</td>
<td>King</td>
<td>Triton</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Train Conductor</td>
</tr>
<tr>
<td></td>
<td>000011961</td>
<td>0</td>
<td>Sub</td>
<td>Snow</td>
<td>White</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Band Member</td>
</tr>
</tbody>
</table>
Absence Review

- Any unapproved absences will be listed:

<table>
<thead>
<tr>
<th>EmpID</th>
<th>Bld#</th>
<th>Name</th>
<th>Absence Name</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Duration</th>
<th>Unit Type</th>
<th>Review Status</th>
<th>Entry Comments</th>
<th>Add Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>0000004363</td>
<td>0 Princess Ariel</td>
<td>Vacation Take</td>
<td>07/30/2010</td>
<td>07/30/2010</td>
<td>8.00 Hours</td>
<td>Hours</td>
<td>Reviewed</td>
<td></td>
<td>Acid Comment</td>
</tr>
<tr>
<td>2</td>
<td>00000004363</td>
<td>0 Princess Ariel</td>
<td>Sick Take - Self</td>
<td>07/27/2010</td>
<td>07/28/2010</td>
<td>16.00 Hours</td>
<td>Hours</td>
<td>Reviewed</td>
<td></td>
<td>Acid Comment</td>
</tr>
<tr>
<td>3</td>
<td>0000004363</td>
<td>0 Princess Belle</td>
<td>Vacation Take</td>
<td>07/19/2010</td>
<td>07/20/2010</td>
<td>16.00 Hours</td>
<td>Hours</td>
<td>Reviewed</td>
<td></td>
<td>Acid Comment</td>
</tr>
<tr>
<td>4</td>
<td>0000003797</td>
<td>0 Daisy Duck</td>
<td>Vacation Take</td>
<td>07/29/2010</td>
<td>07/30/2010</td>
<td>8.00 Hours</td>
<td>Hours</td>
<td>Reviewed</td>
<td></td>
<td>Acid Comment</td>
</tr>
<tr>
<td>5</td>
<td>0000011116</td>
<td>0 Donald Duck</td>
<td>Sick Take - Self</td>
<td>07/27/2010</td>
<td>07/28/2010</td>
<td>8.00 Hours</td>
<td>Hours</td>
<td>Reviewed</td>
<td></td>
<td>Acid Comment</td>
</tr>
<tr>
<td>6</td>
<td>0000004759</td>
<td>0 Princess Jasmine</td>
<td>Vacation Take</td>
<td>07/15/2010</td>
<td>07/16/2010</td>
<td>32.00 Hours</td>
<td>Hours</td>
<td>Reviewed</td>
<td></td>
<td>Acid Comment</td>
</tr>
<tr>
<td>7</td>
<td>0000004759</td>
<td>0 Princess Jasmine</td>
<td>Funeral Take</td>
<td>07/28/2010</td>
<td>07/29/2010</td>
<td>4.00 Hours</td>
<td>Hours</td>
<td>Reviewed</td>
<td></td>
<td>Acid Comment</td>
</tr>
<tr>
<td>8</td>
<td>0000004759</td>
<td>0 Princess Jasmine</td>
<td>CTO Take</td>
<td>07/15/2010</td>
<td>07/16/2010</td>
<td>4.00 Hours</td>
<td>Hours</td>
<td>Reviewed</td>
<td></td>
<td>Acid Comment</td>
</tr>
<tr>
<td>9</td>
<td>0000004759</td>
<td>0 Princess Jasmine</td>
<td>CTO Take</td>
<td>06/17/2010</td>
<td>06/17/2010</td>
<td>4.00 Hours</td>
<td>Hours</td>
<td>Reviewed</td>
<td></td>
<td>Acid Comment</td>
</tr>
<tr>
<td>10</td>
<td>0000004759</td>
<td>0 Princess Jasmine</td>
<td>CTO Take</td>
<td>07/14/2010</td>
<td>07/14/2010</td>
<td>4.00 Hours</td>
<td>Hours</td>
<td>Reviewed</td>
<td></td>
<td>Acid Comment</td>
</tr>
<tr>
<td>11</td>
<td>0000003902</td>
<td>0 Minnie Mouse</td>
<td>Vacation Take</td>
<td>06/09/2010</td>
<td>06/10/2010</td>
<td>16.00 Hours</td>
<td>Hours</td>
<td>Reviewed</td>
<td></td>
<td>Acid Comment</td>
</tr>
<tr>
<td>12</td>
<td>0000006774</td>
<td>0 King Triton</td>
<td>Vacation Take</td>
<td>07/03/2010</td>
<td>07/04/2010</td>
<td>16.00 Hours</td>
<td>Hours</td>
<td>Reviewed</td>
<td></td>
<td>Acid Comment</td>
</tr>
<tr>
<td>13</td>
<td>0000006774</td>
<td>0 King Triton</td>
<td>Jury Duty Take</td>
<td>07/12/2010</td>
<td>07/12/2010</td>
<td>16.00 Hours</td>
<td>Hours</td>
<td>Reviewed</td>
<td></td>
<td>Acid Comment</td>
</tr>
<tr>
<td>14</td>
<td>000001961</td>
<td>0 Snow White</td>
<td>Sick Take - Family</td>
<td>07/03/2010</td>
<td>07/04/2010</td>
<td>8.00 Hours</td>
<td>Hours</td>
<td>Reviewed</td>
<td></td>
<td>Acid Comment</td>
</tr>
<tr>
<td>15</td>
<td>000001961</td>
<td>0 Snow White</td>
<td>Sick Take - Self</td>
<td>07/03/2010</td>
<td>07/04/2010</td>
<td>8.00 Hours</td>
<td>Hours</td>
<td>Reviewed</td>
<td></td>
<td>Acid Comment</td>
</tr>
</tbody>
</table>

If accurate, select **Reviewed**. If inaccurate, select **Needs Corr**.

If you select **Needs Corr**, then be sure to add a comment.
Absence Status

- Once marked “Reviewed” employee cannot change
- Once marked “Approved” timekeeper or employee cannot change
- Once marked “Finalized” only Payroll can change
- “Needs Correction” sends email to employee with comments
- Absences with trash cans are safe to delete by employees
- Process guide on Payroll Website
- Track absence entries
- Track unapproved absences
- Track employees who have not reported “No Leave Taken”
Absence Management Self Service

Employee Information (Self-Reporter)
- AMSS Self-Reporter Quick Start Log in Guide: PDF
- AMSS Self-Reporter Training (running time approx. 17 minutes): Video
- AMSS Employee Absence and Hours for Pay Entry Training - presentation format: PDF

Timekeeper Information (Department Reporter/Reviewer)
- AMSS Timekeeper Quick Start Log in Guide: PDF
- AMSS training video for timekeepers (running time approx. 7 minutes): Video
- AMSS Timekeeper Training - presentation format: PDF
- Timekeeper Timesheet Quick Start Guide - timekeeper hours for pay entry: PDF
- Absence Management Multi-Reports Guide: PDF

Manager Information (Approver)
- AMSS Approver Quick Start Log in Guide: PDF
- AMSS training video for managers (running time approx. 8 minutes): Video
- AMSS Approver Training - presentation format: PDF
- AMSS Alternate or Proxy Approver: PDF
- Absence Management Multi-Reports Guide: PDF

abc.afd.calpoly.edu
Tips for Success

- Develop an internal absence request and tracking system
- Implement an earlier internal department due date for absence entry
- Be copied on absence requests
- Alert approver when you are finished reviewing – ask not to take action until then!
- Don’t review future dated entries – employee cannot change them
- Good communication with Payroll
Questions for me?

Lori Serna
Manager, Payroll Services
lserna@calpoly.edu
756-5867