ABC 2015 Fall Summit

Absence Management Reporting

Absence Management Self-Service (AMSS)

September 9, 2015

Class Objectives

- What are absence management reports?
- What reports are available?
- Why are these reports useful to me?
- How do I run the reports?
- Getting help
- Questions?
Absence Management (AM) Reports are delivered reports in AMSS to assist with reviewing, tracking, auditing, and forecasting absences for employees. Think of these reports as your “dashboards” for employee absences.

How to log in

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

Must have CSU AM Manager or Timekeeper roles to be able to access these reports
Absence Management Reports

Running Reports

- Employees you can report on is based on your AMSS security
- Reports can be run online or to batch
  - Only run online if you are running 1 pay period or a small amount of data. Otherwise run to batch and download to excel
- Flexible reporting criteria
  - All employees
  - 1 employee
  - Pay period(s)
  - Dept ID
  - CSU Unit
Absence Activity

- All activity in a pay period including accruals, adjustments, takes and final balances.

Uses for this report include: tracking current balances, CAT donation balances and limits, ensuring absence takes were applied and seeing accrual rates. With manipulation, you can forecast vacation balances to respond to time off requests or to determine if any employees will lose time at year end.

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Name</th>
<th>Code</th>
<th>Category</th>
<th>Activity</th>
<th>Time Off</th>
<th>Approval</th>
<th>Absence Type</th>
<th>Absence Date</th>
<th>Balance</th>
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</thead>
<tbody>
<tr>
<td>0000000001</td>
<td>Anon. Employee</td>
<td>ABC</td>
<td>Regular</td>
<td>Payroll</td>
<td>300.00</td>
<td>300.00</td>
<td>CAT Donation</td>
<td>01/11/2015</td>
<td>40</td>
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<tr>
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<td>ABC</td>
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<td>300.00</td>
<td>CAT Donation</td>
<td>01/11/2015</td>
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</tbody>
</table>

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Absence Adjustment

- Report of adjustments processed by payroll. Reasons for adjustments include: absences reported or approved late. Manual intervention needed by payroll.

*Uses for this report include: researching why an adjustment is posted on an employee balance page or looking to see if a form you submitted to payroll to adjust absences has been processed.*

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Adjustment Reason “Self-Service PPE Adjustment” are absences that were entered and/or approved after the month the absence took place has been closed in Absence Management. When they are approved it sends an adjustment to payroll to manually process the time.
Reported Absences

- Report of all absence entries for specified pay period(s)

**Uses for this report include:** Comparing entries against internal absence records/requests, historical research (back to 2008), looking for patterns

**Source = who entered the time**

"Employee"- entered by the employee, validated by log in
"Manager"- entered by timekeeper or manager
"Administrator"- entered and/or approved by payroll

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**Reported Absences**

- [Table](#)

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```plaintext
Source = who entered the time
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"Manager"- entered by timekeeper or manager
"Administrator"- entered and/or approved by payroll
```
Reported Absences Not Approved

- Report of all absences not yet approved by a manager

Uses for this report include: checking to see which absences are needing approval.

Absence Status

- Submitted – Employee logged their own entry and it is unapproved
- Reviewed – Entry could have been entered by the employee and the timekeeper then marked as "reviewed" or the timekeeper entered on behalf of the employee which automatically marks it as reviewed.
- Needs Correction – Either the timekeeper or manager has marked the entry as "needs correction". They have the option to add a comment to the entry. An email is sent to the employee informing them.

Reported By

- User name of last person to take action on the entry.
Audit Comments

- Results of any absences that have comments entered

Uses for this report include: research FML absences or your department may require comments for earning CTO.

Can you think of any others?
No Leave Taken

- Track employees who have not reported any absences or “No Leave Taken”.
- Report will need to be manipulated to remove any employee not required to report “No Leave Taken” (for example – hourly or academic year employees)
- Delivered output will provide 2 reports – No leave taken and No leave taken no R03. Because there are employees in bargaining unit 3 who are required to report no leave taken, we do not use that report.

Uses for this report include: researching employees who consistently do not report time.

Best to run this report on or after the last reporting day for employees. Payroll contacts employees who have not reported time on the first approval day (the 2nd day of the following pay period).
Tips for Success

- Make it a habit to run these reports monthly
- Ask your managers what types of reports would be useful to them

Absence Management Website
Questions for me?

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