ABC 2015 Fall Summit

Absence Management for Timekeepers

Absence Management Self-Service (AMSS)

September 9, 2015

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?
**What is Absence Management?**

**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

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**Roles & Responsibilities**

<table>
<thead>
<tr>
<th>Employee-Self Reporter</th>
<th>Timekeeper/Supervisor</th>
<th>Manager</th>
<th>Payroll</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enters Absences by the first day of the following pay period</td>
<td>Reviews Absences submitted and recommends for approval to the manager (may also enter Absences for the dept.)</td>
<td>Approves Absences by the third business day of the pay period</td>
<td>Reviews and Finalizes Absences by the 10th of the pay period</td>
</tr>
</tbody>
</table>
How to log in

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

Timekeeper Absence Review

Manager Self Service

- Navigate to self service information and activities for people reporting to you.
- Timekeeper Balance Inquiry
- Timekeeper Absence Review

Approve Time and Exceptions

- Approve reported or payable time, overtime and absence requests, and manage exceptions.
- Timekeeper Absence Review

Report Time

- Report time or request absences.
- Timekeeper Absence Entry
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>Email ID</th>
<th>Initials</th>
<th>First Name</th>
<th>Last Name</th>
<th>Status</th>
<th>Regular/Extra Hours</th>
<th>Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>000004369 0</td>
<td>Sub</td>
<td>Princess</td>
<td>Ariel</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Manager</td>
</tr>
<tr>
<td>☑</td>
<td>000010266 0</td>
<td>Sub</td>
<td>Princess</td>
<td>Britie</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Brand Manager</td>
</tr>
<tr>
<td>☑</td>
<td>000003787 0</td>
<td>Sub</td>
<td>Daley</td>
<td>Duck</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Train Conductor</td>
</tr>
<tr>
<td>☑</td>
<td>000011118 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 0</td>
<td>Sub</td>
<td>Priscilla</td>
<td>Jasmine</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Brand Member II</td>
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<tr>
<td>☑</td>
<td>000003982 0</td>
<td>Sub</td>
<td>Michelle</td>
<td>House</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Makeup Manager</td>
</tr>
<tr>
<td>☑</td>
<td>000006774 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>000011861 0</td>
<td>Sub</td>
<td>Shaw</td>
<td>White</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Brand Member</td>
</tr>
</tbody>
</table>

.absence review

- Any unapproved absences will be listed:

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Status</th>
<th>Absence Type</th>
<th>Absence Date</th>
<th>Hours</th>
<th>Approval Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>000034569</td>
<td>Princess</td>
<td>Ariel</td>
<td>Active</td>
<td>Vacation</td>
<td>07/06/2021</td>
<td>8</td>
<td>Reviewed</td>
</tr>
<tr>
<td>000035659</td>
<td>Princess</td>
<td>Britie</td>
<td>Active</td>
<td>Sick Leave</td>
<td>07/06/2021</td>
<td>4</td>
<td>Needs Review</td>
</tr>
<tr>
<td>000036789</td>
<td>Princess</td>
<td>Jasmine</td>
<td>Active</td>
<td>Vacation</td>
<td>07/12/2021</td>
<td>3</td>
<td>Reviewed</td>
</tr>
<tr>
<td>000037879</td>
<td>Princess</td>
<td>Jasmine</td>
<td>Active</td>
<td>Vacation</td>
<td>07/12/2021</td>
<td>4</td>
<td>Reviewed</td>
</tr>
<tr>
<td>000038989</td>
<td>Princess</td>
<td>Jasmine</td>
<td>Active</td>
<td>Vacation</td>
<td>07/12/2021</td>
<td>4</td>
<td>Reviewed</td>
</tr>
</tbody>
</table>

If you select "Needs Review", please 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

Reports

- Process guide on Payroll Website
- Track absence entries
- Track unapproved absences
- Track employees who have not reported “No Leave Taken”
Absence Management Website

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?

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