ABC 2015 Fall Summit

Absence Management for Timekeepers

Absence Management Self-Service (AMSS)

September 9, 2015

abc.afd.calpoly.edu
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
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 Balance Inquiry

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>EmplID</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>
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</thead>
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<tr>
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<td>0</td>
<td>Sub</td>
<td>Princess</td>
<td>Ariel</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Makeup Manager</td>
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<td>0</td>
<td>Sub</td>
<td>Princess</td>
<td>Belle</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Band Member I</td>
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<tr>
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<td>0</td>
<td>Sub</td>
<td>Daisy</td>
<td>Duck</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Train Conductor</td>
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<td>0</td>
<td>Sub</td>
<td>Donald</td>
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<td>Mouse</td>
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<tr>
<td>000006774</td>
<td>0</td>
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<td>Triton</td>
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<tr>
<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>
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</table>

Select All  Deselect All  Continue
Absence Review

- Any unapproved absences will be listed:

<table>
<thead>
<tr>
<th>EmpID</th>
<th>BcId</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>
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<td>Vacation Take</td>
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<td>07/30/2010</td>
<td>6.0 Hours</td>
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<td>Reviewed</td>
<td></td>
<td>Acid Comment</td>
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<td>Princess Ariel</td>
<td>Sick Take</td>
<td>07/30/2010</td>
<td>07/30/2010</td>
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<td>Acid Comment</td>
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<td>Princess Belle</td>
<td>Vacation Take</td>
<td>07/30/2010</td>
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<td>Daisy Duck</td>
<td>Vacation Take</td>
<td>07/29/2010</td>
<td>07/28/2010</td>
<td>6.0 Hours</td>
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<td>5</td>
<td>00011116</td>
<td>Donald Duck</td>
<td>Sick Take - Self</td>
<td>07/27/2010</td>
<td>07/28/2010</td>
<td>16.0 Hours</td>
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<td>Princess Jasmine</td>
<td>Vacation Take</td>
<td>07/15/2010</td>
<td>07/21/2010</td>
<td>32.0 Hours</td>
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<td>Reviewed</td>
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<td>Princess Jasmine</td>
<td>Funeral Take</td>
<td>07/23/2010</td>
<td>07/28/2010</td>
<td>4.0 Hours</td>
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<td>Princess Jasmine</td>
<td>CTO Take</td>
<td>07/15/2010</td>
<td>07/15/2010</td>
<td>4.0 Hours</td>
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<tr>
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<td>Princess Jasmine</td>
<td>CTO Take</td>
<td>06/17/2010</td>
<td>06/17/2010</td>
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<td>Vacation Take</td>
<td>07/05/2010</td>
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<td>Jury Duty Take</td>
<td>07/12/2010</td>
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<tr>
<td>14</td>
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<td>Snow White</td>
<td>Sick Take - Family</td>
<td>07/09/2010</td>
<td>07/08/2010</td>
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<td></td>
<td></td>
<td></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.

Submit
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”
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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