



Absence Management Self-Service (AMSS)

Approver Training
Payroll Services
Lori Serna

Training Overview

- What is Absence Management Self-Service (AMSS)?
- What are the roles and responsibilities?
- Enhancements to the My Cal Poly Portal
- What does this new system do?
- What are the monthly approver activities in AMSS?
- Getting help
- Questions?

About AMSS

Absence Management Self Service is a CSU wide project that replaces the existing paper reporting process with an online system that allows:

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

AMSS Overview Video

<http://csumyconnect.calstate.edu/p19152148/>

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

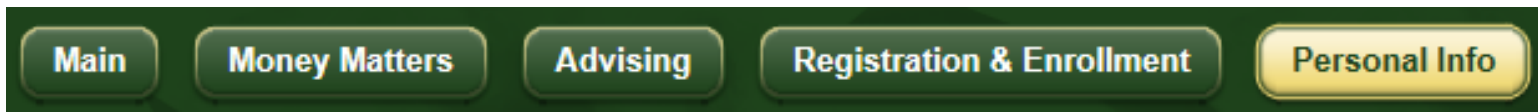
Reviews and Finalizes Absences by the 10th of the pay period

How to log in

Log in to the My Cal Poly Portal

my.calpoly.edu

Click on the **Personal Info** tab



My Leave Balance Overview –

- At-a-glance available balance information, so you don't have to go all the way into PeopleSoft
- Shows four main absence types: Sick, Vacation, Personal Holiday, CTO
- Click on "View All Balances" for more detail

Employee Info	
My Leave Balance Overview as of October 01, 2012. Please Note: These balances may not reflect pending adjustments or current month activity.	
Sick Leave Balance:	187.500 Hours
Vacation Balance:	258.420 Hours
Personal Holiday:	1 Day
Compensatory Time Off:	.375 Hours
View All Leave Balances	

My Benefits/My Job Info–

- Hosted by Human Resources/Academic Personnel
- *My Benefits*: Displays Benefits and Retirement Plan information
- *My Job Info*: View Current Job and Pay Info, including compensation history by clicking on the links

My Benefits



Benefits Summary and Enrollment

[View](#)



Retirement Plan:

PERS-SS/MED 2%@55

My Job Info

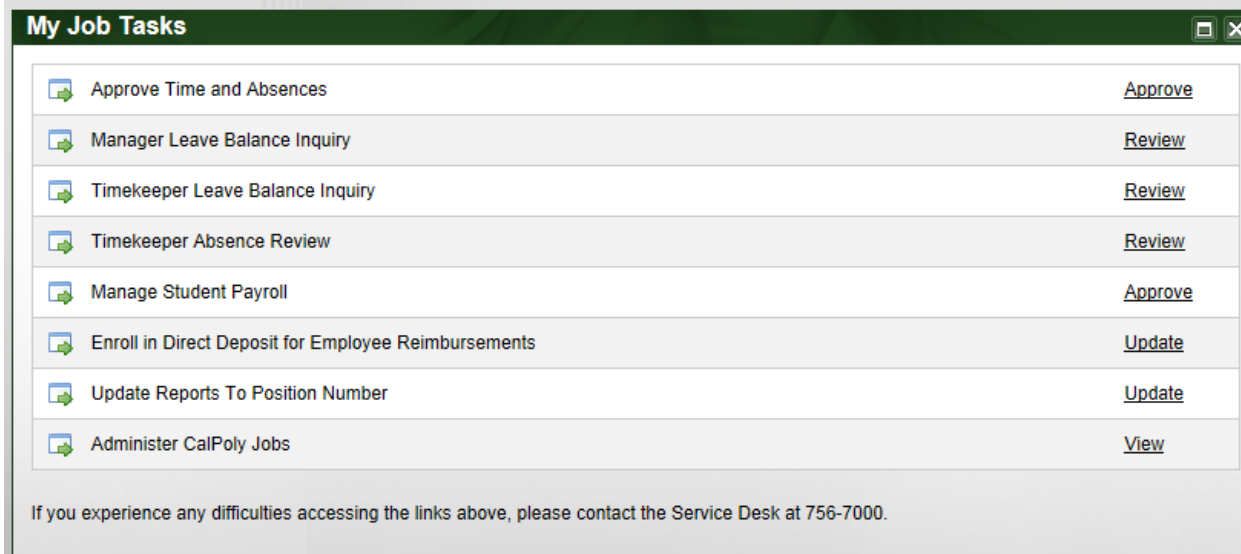
[View Current Job and Pay Info](#)

[View Compensation History](#)

My Job Tasks–

Role-driven links to job tasks all in one place, such as:

- Master Payroll Certification
- Student Payroll
- Pay and leave Approvals and Review
- Timekeeper and Manager Balance Inquiry



Leave Usage or Earn

My Pay and Leave Usage Section

Submit Leave Usage or Leave Earned – using Absence Management Self Service (AMSS) enter all leave hours earned or taken:

- Vacation, Sick or PH
- Earn and Use CTO
- Earn and Use ADO
- Other leaves like FL, ML, MPA

My Pay and Leave Usage



Submit Leave Usage or Leave Earned





[Submit](#)





Enter absence activity into Absence Management Self-Service (AMSS). For further assistance, go to the [AMSS website](#) or call Payroll Services at (805) 756-2605.





[Continue →](#)

Enhancements

Users will be able to see available balances at entry for sick, vacation, CTO, PH etc...

Enter New Absence Events									
Absence Name	*Begin Date	*End Date	Balance	*Partial Days	Absence Duration	Unit Type			
Vacation ▼	10/01/2012 	10/01/2012 	235.754	None ▼		Hours	Add Comments		

Enter New Absence Events									
Absence Name	*Begin Date	*End Date	Balance	*Partial Days	Absence Duration	Unit Type			
Sick - Self ▼	10/01/2012 	10/01/2012 	171.5	None ▼		Hours	Add Comments		

Enter New Absence Events									
Absence Name	*Begin Date	*End Date	Balance	*Partial Days	Absence Duration	Unit Type			
Personal Holiday ▼	10/01/2012 	10/01/2012 	1	None ▼		Days	Add Comments		

Enhancements





Users will not be able to submit time they don't have...

[Click for Instructions](#)

ERROR! The absence entered exceeds your available balance. Adjust your absence so that it does not exceed your absence balance or contact Payroll to report the absence.

From 10/01/2012  Through 10/30/2012 

Existing Absence Events					
Customize Find  First 1 of 1 Last					
Absence Name	Begin Date	End Date	Absence Duration	Unit Type	Last Updated By

Enter New Absence Events									
Absence Name	*Begin Date	*End Date	Balance	*Partial Days	Hours per Day	Absence Duration	Unit Type		
CTO Take ▼	10/01/2012 	10/01/2012 	0.375	Partial Hours ▼	5.00	5.00	Hours	Add Comments	 

Calculate Duration

[Timesheet](#)

To the best of my knowledge and belief, the information submitted is accurate and in full compliance with legal and CSU policy requirements.

Submit

Enhancements





Users will be able to submit absence events two months forward and three months back...AMSS will tell you if the date you select is outside of that range



Enhancements

Users will be prompted to specify the relationship to the employee for appropriate leave types (Funeral Leave, Sick Leave Family, etc.)

The user will not be able to submit the take without it

Enter New Absence Events								
Absence Name	*Begin Date	*End Date	*Partial Days	Absence Duration	Unit Type			
Bereavement/Funeral ▼	10/01/2012 	10/01/2012 	None ▼		Hours	Add Comments		

[Click for Instructions](#)

ERROR! The absence selected requires the entry of the family relationship in the "Comments" field.

Enhancements

Salaried employee schedules will be input in AMSS...

Enter New Absence Events									
Absence Name	*Begin Date	*End Date	Balance	*Partial Days	Absence Duration	Unit Type			
Vacation	08/31/2012	09/07/2012	235.754	None	40.00	Hours	Add Comments	+	-

[Calculate Duration](#)

[Timesheet](#)

To the best of my knowledge and belief, the information submitted is accurate and in full compliance with legal and CSU policy requirements.

[Submit](#)

A range of dates can be reported of one leave type, such as Vacation (shown above)

AMSS will only count scheduled days/hours; it will exclude holidays or days off when it calculates the duration of the absence range

Enhancements

No Leave Taken will be the default Absence Name...

From Through

Existing Absence Events					
Absence Name	Begin Date	End Date	Absence Duration	Unit Type	Last Updated By

Enter New Absence Events					
Absence Name	*Begin Date	*End Date	Absence Duration	Unit Type	
No Leave Taken	10/01/2012	10/30/2012			Add Comments <input type="button" value="+"/> <input type="button" value="-"/>

[Timesheet](#)

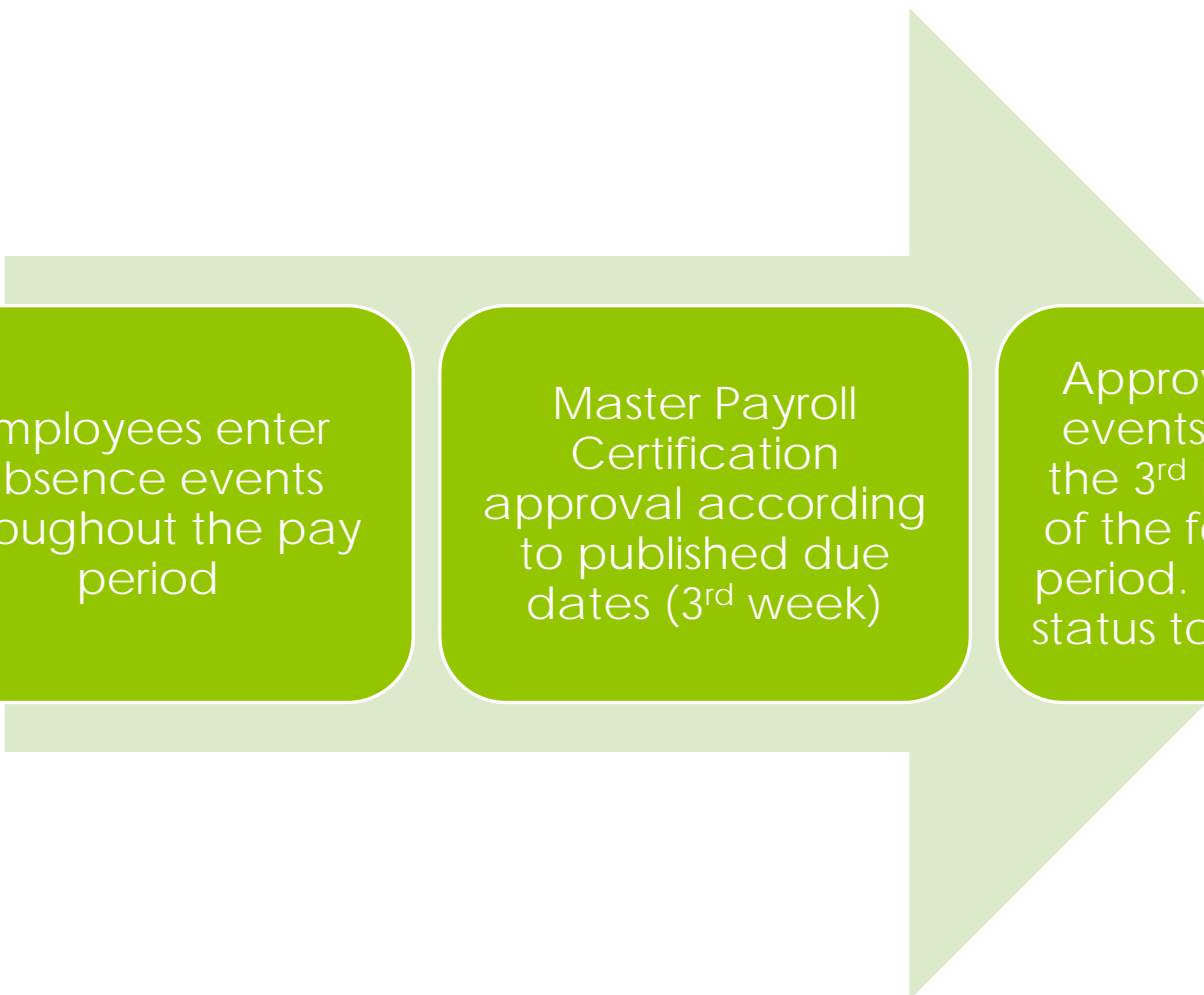
To the best of my knowledge and belief, the information submitted is accurate and in full compliance with legal and CSU policy requirements.

If the user had no leave time earned or taken for the month, they simply:

1. Log in to AMSS
2. Validate the "Begin and End" Dates are correct (default is the state pay period dates)
3. Hit Submit

Monthly Overview

Approver Monthly Activity Overview:



Employees enter
absence events
throughout the pay
period

Master Payroll
Certification
approval according
to published due
dates (3rd week)

Approve absence
events entered by
the 3rd business day
of the following pay
period. Set absence
status to "approved"

Activity One

Employees enter absence events throughout the pay period

- Reminders throughout the month to enter time, and the due dates. A final reminder on the last day will go to just those who have not reported anything
- Instructional Faculty (appointed by academic year) only are required to use the system to report leave taken. They do not need to report "No Leave Taken"
- Employees must report all absences for the month by the first day of the following pay period. Same day as paper forms were due
- Recommend employees enter absence events as they occur throughout the month

Activity Two

Master Payroll Certification (MPC) approval according to published due dates (3rd week)

- Timekeeper Role will change from “approver” to “reviewer”
- Timekeeper will review the Payroll for the department; validates employee days worked, FTE, dock days reported correctly, etc.
- Approver role will be performed by Manager/Dean/Department Chair
- Timekeepers will alert you when review is complete and recommend for approval
- Link found in “My Job Tasks” on the Personal Info tab of the My Cal Poly Portal
- MPC approver logs in and approves as appropriate by checking boxes by certified employees and submits

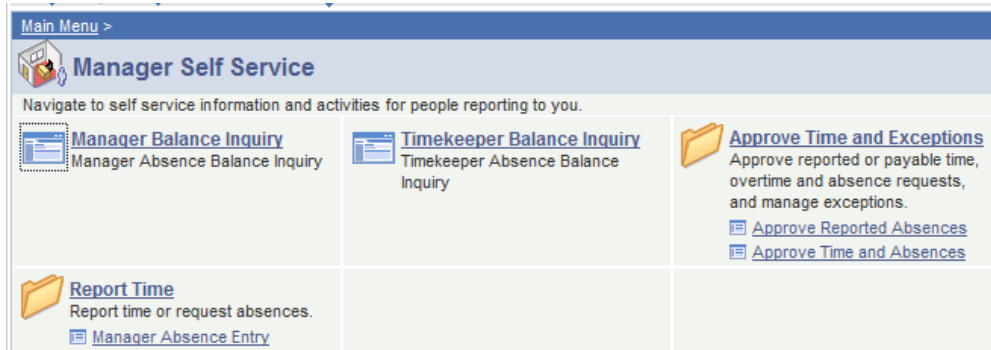
Activity Three

Approve absence events entered by the 3rd business day of the following pay period. Set absence status to “approved”

Approve Time and Absences link found under “My Job Tasks” on the Personal Info tab of the My Cal Poly Portal.






These are your PeopleSoft Approver Options:



Activity Three

Approve Time and Absences



The page loads all employees that report to you for approval automatically...may take several seconds

Employees									
Customize Find View All  First 1-5 of 5 Last									
Select	EmplID	Empl Rcd	Cur Pd Abs	First Name	Last Name	Status	Dept Name	Position	Jobtitle
<input type="checkbox"/>	000003797	0	Sub	Daisy	Duck	Active	Anaheim Ducks	00000458	Train Conductor 
<input type="checkbox"/>	000011116	0	Sub	Donald	Duck	Active	Anaheim Ducks	00000451	Train Conductor
<input type="checkbox"/>	000003992	0	Sub	Minnie	Mouse	Active	Anaheim Ducks	00000218	Makeup Manager 
<input type="checkbox"/>	000006774	0	Sub	King	Triton	Active	Anaheim Ducks	00000474	Train Conductor
<input type="checkbox"/>	000011961	0	Sub	Snow	White	Active	Anaheim Ducks	00000624	Band Member

Select All Deselect All Continue

- You can approve absence entries individually or select all
- Clicking on the “hierarchy” icon shows you all employees that report to your direct reports
- When done selecting, hit Continue

Activity Three

Customize Find   First 1-7 of 7 Last								
	Absence Name	Begin Date	End Date	Duration	Unit Type	Approve	Review Status	Add Comment
	Vacation	10/31/2012	10/31/2012	1.00000	Hours	<input type="checkbox"/>	<input type="text"/>	Add Comment
	Personal Holiday	12/28/2012	12/28/2012	1.00000	Days	<input type="checkbox"/>	<input type="text"/>	Add Comment
	Vacation	11/01/2012	11/01/2012	4.00000	Hours	<input type="checkbox"/>	<input type="text"/>	Add Comment
	Vacation	12/17/2012	12/21/2012	20.00000	Hours	<input type="checkbox"/>	<input type="text"/>	Add Comment
	Union Non-Reimbursed	11/09/2012	11/09/2012	8.00000	Hours	<input type="checkbox"/>	<input type="text"/>	Add Comment
	Sick - Self	11/09/2012	11/09/2012	0.50000	Hours	<input type="checkbox"/>	<input type="text"/>	Add Comment
	Sick - Self	10/31/2012	10/31/2012	5.00000	Hours	<input type="checkbox"/>	Reviewed <input type="text"/>	Add Comment

- Review hours submitted; If your timekeeper has reviewed prior to your approval, you will see the "Review Status" set to Reviewed
- If the hours are approved, check the box in the "Approve" column
- If you need to send the hours back to the employee for correction, change the "Review Status" to Needs Corr and add a comment



Activity Three

Customize Find First 1-7 of 7 Last								
	Absence Name	Begin Date	End Date	Duration	Unit Type	Approve	Review Status	Add Comment
	Vacation	10/31/2012	10/31/2012	1.00000	Hours	<input checked="" type="checkbox"/>	<input type="text"/>	Add Comment
	Personal Holiday	12/28/2012	12/28/2012	1.00000	Days	<input checked="" type="checkbox"/>	<input type="text"/>	Add Comment
	Vacation	11/01/2012	11/01/2012	4.00000	Hours	<input checked="" type="checkbox"/>	<input type="text"/>	Add Comment
	Vacation	12/17/2012	12/21/2012	20.00000	Hours	<input checked="" type="checkbox"/>	<input type="text"/>	Add Comment
	Union Non-Reimbursed	11/09/2012	11/09/2012	8.00000	Hours	<input checked="" type="checkbox"/>	<input type="text"/>	Add Comment
	Sick - Self	11/09/2012	11/09/2012	0.50000	Hours	<input checked="" type="checkbox"/>	<input type="text"/>	Add Comment
laire	Sick - Self	10/31/2012	10/31/2012	5.00000	Hours	<input checked="" type="checkbox"/>	Reviewed <input type="text"/>	Add Comment

Submit

- If the hours are approved, check the box in the "Approve" column (select all for your convenience)
- If you need to send the hours back to the employee for correction, change the "Review Status" to "Needs Corr" and add a comment (email generated to the employee)
- When you have completed your approval, hit **Submit**. All hours need to be approved by the due date each month

Activity Three

Employees								
Customize Find View All First 1-5 of 5 Last								
Emplid	Empl Rcd	Cur Pd Abs	First Name	Last Name	Status	Dept Name	Jobtitle	
000003797	0	Sub	Daisy	Duck	Active	Anaheim Ducks	Train Conductor	
000011116	0	Sub	Donald	Duck	Active	Anaheim Ducks	Train Conductor	
000003992	0	Sub	Minnie	Mouse	Active	Anaheim Ducks	Makeup Manager	
000006774	0	Sub	King	Triton	Active	Anaheim Ducks	Train Conductor	
000011961	0	Appr	Snow	White	Active	Anaheim Ducks	Band Member	
								First

Enter and View Reported Absences for an Employee

Managers can enter and view reported absences for their direct reports and the direct reports of managers reporting to them. Absences submitted on behalf of an employee by a Manager are entered with an "Approved" status

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

Activity Three

From Through

Existing Absence Events						
Customize Find First 1-6 of 6 Last						
Absence Name	Begin Date	End Date	Absence Duration	Unit Type	Absence Status	Last Updated By
Furlough Day Take	05/07/2010	05/07/2010	1.00	Days	Finalized	
Sick Take - Self	05/14/2010	05/14/2010	8.00	Hours	Finalized	
Furlough Day Take	05/21/2010	05/21/2010	1.00	Days	Finalized	
Furlough Day Take	06/04/2010	06/04/2010	1.00	Days	In Process	
Vacation Take	06/23/2010	06/28/2010	32.00	Hours	Approved	
Furlough Day Take	06/30/2010	06/30/2010	1.00	Days	In Process	

Enter New Absence Events						
Absence Name	Begin Date	End Date	Absence Duration	Unit Type		
<input type="text" value="No Time Taken"/>	<input type="text" value="07/01/2010"/>	<input type="text" value="07/31/2010"/>		Days	Add Comments	<input type="button" value="+"/> <input type="button" value="-"/>








[Timesheet](#)

To the best of my knowledge and belief, the information submitted is accurate and in full compliance with legal and CSU policy requirements.

The "Report and View Absences" page is displayed. "From" and "Through" dates are defaulted to the current month. To view historical or future data, change the From and/or Through date(s).

Enter any necessary absence information for the employee and click the Submit button.

Activity Three

Existing Absence Events							Customize Find 	First  1-4 of 4  Last
Absence Name	Begin Date	End Date	Absence Duration	Unit Type	Absence Status	Last Updated By		
Sick Take - Self	07/08/2010	07/08/2010	8.00	Hours	Submitted	Snow White		
Sick Take - Family	07/09/2010	07/09/2010	8.00	Hours	Submitted	Snow White		
Vacation Take	07/12/2010	07/15/2010	32.00	Hours	Approved	Mickey Mouse		
Jury Duty Take	07/22/2010	07/22/2010	8.00	Hours	Submitted	Snow White		

Reported absences may only be deleted under certain statuses. "Finalized" absence entries may not be deleted as they have already been processed by Payroll.

Managers may delete reported absences with a review status of "Approved", "Reviewed", "Needs Correction" or "Submitted".

An email is generated to the employee alerting them that an absence has been deleted on their behalf.

Activity Three

"Absence Status"

Submitted* – the absence has been submitted

Reviewed – the absence has been reviewed by the timekeeper

Approved – the absence has been approved by the manager

Needs Correction * – the absence entered was sent back to the employee by the timekeeper or manager and needs to be corrected or deleted

Finalized – Payroll has processed your absence

*only absences with these statuses can be corrected or deleted by the employee; recommend "reviewing" and "approving" wait until the end of the month

Reports

AMSS will give Timekeepers and Managers reporting capabilities to assist with monthly audits or ad hoc leave reporting needs

CSU Absence Management - Multi Reports

Report Control ID: REPORT [Report Manager](#) [Process Monitor](#) [Submit](#)

Absence Report Search

Empl ID:

Empl Rcd#:

CSU Unit:

Department:

Period ID: 2012-09

[Clear](#) [Refresh Employee List](#) No Refresh Required (last refresh was: 10/18/12 00:57)

* Click on hyperlink for online query reporting

* Check box(es) to include in report run

Monthly Processing

<input type="checkbox"/> Absence Activity	<input checked="" type="checkbox"/> Select All
<input type="checkbox"/> Absence Adjustment	<input type="checkbox"/> Clear All
<input checked="" type="checkbox"/> No Leave Taken	
<input type="checkbox"/> Reported Absence Not Processed	
<input type="checkbox"/> Reported Absences	
<input type="checkbox"/> Reported Absences Not Approved	

[Save](#)

Data can be viewed online and downloaded to Excel; or run in "batches" to the process monitor. See full guide on Payroll website.

Getting Help

- Click the [Click for Instructions](#) link on the PeopleSoft Approval pages
- Review the Manager/Approver section on the AMSS page on Payroll's website for full business process guides
- Contact your department timekeeper, as appropriate
- Email our Absence Management Self-Service email address payroll-selfservice@calpoly.edu
- Call Payroll Services at 756-2605



Questions?