



Absence Management Self-Service (AMSS)

Timekeeper 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 timekeeper 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

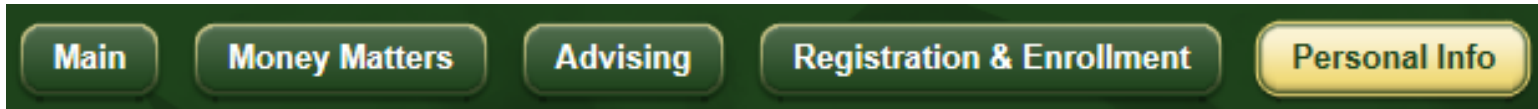
Reviews and
Finalizes
Absences by
the 10th of
the pay
period

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

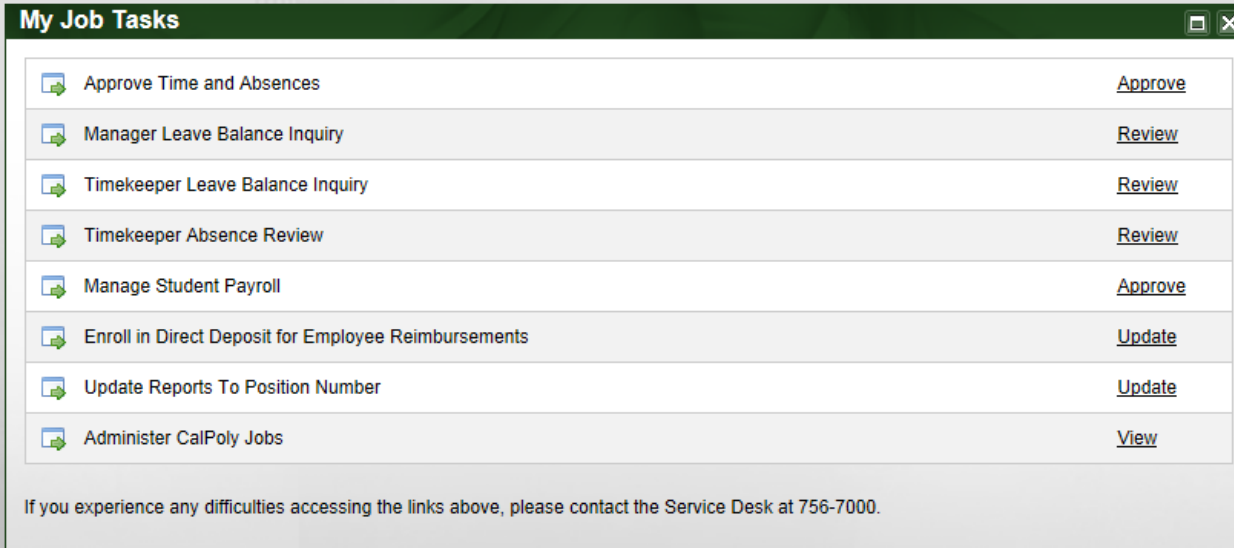
[View Current Job and Pay Info](#)

[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



The screenshot shows a window titled "My Job Tasks" with a list of tasks and their corresponding actions. The tasks are listed in a table-like format with a small icon to the left of each task name and a link to the right.

Task Name	Action
Approve Time and Absences	Approve
Manager Leave Balance Inquiry	Review
Timekeeper Leave Balance Inquiry	Review
Timekeeper Absence Review	Review
Manage Student Payroll	Approve
Enroll in Direct Deposit for Employee Reimbursements	Update
Update Reports To Position Number	Update
Administer CalPoly Jobs	View

If you experience any difficulties accessing the links above, please contact the Service Desk at 756-7000.

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 Through

Existing Absence Events					
Customize Find Print 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	<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.

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	<input type="text" value="10/01/2012"/>	<input type="text" value="10/30/2012"/>			Add Comments + -

[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

Timekeeper Monthly Activity Overview:

Employees enter absence events throughout the pay period

Timekeepers review Master Payroll Certification to recommend for approval according to published due dates (3rd week)

Timekeepers review absence events entered by the 1st day of the following pay period. Set absence status to "reviewed"

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



Timekeepers review Master Payroll Certification to recommend for approval according to published due dates (3rd week)

- Timekeeper Role will change from “approver” to “reviewer”
- Same page, just the approval buttons will be grayed out
- Link found in “My Job Tasks” on the Personal Info tab of the My Cal Poly Portal
- ***What’s the same:***
 - Review details (FTE, days paid, dock days reflected)
 - Report to Payroll Contact any differences
- ***What’s changed:***
 - When review is complete, alert the MPC Approver (MPP or Dept. Chair) you have completed your review and recommend certification on the appropriate employees
 - No PeopleSoft online timekeeper action is necessary
 - The Approver will log in and check the boxes and submit.

Activity Three

Timekeepers review absence events entered by the 1st day of the following pay period. Set absence status to “reviewed”

Timekeeper Absence Review link found under “My Job Tasks” on the Personal Info tab of the My Cal Poly Portal.





 Timekeeper Leave Balance Inquiry	Review
 Timekeeper Absence Review	Review

These are your PeopleSoft Timekeeper Options:

Main Menu > Manager Self Service >

Time Management

Manage schedules, view and approve reported and payable time, absence and overtime requests, exceptions, and more.

 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 Entry
	 Timekeeper Absence Review	

Activity Three

Timekeeper Absence Review

The page loads all employees you have timekeeping responsibilities for automatically...may take several seconds

Employees									Customize	Find	View All	First	1-8 of 8	Last	
Select	EmplID	Empl Rcd	Cur Pd Abs	First Name	Last Name	Status	Dept Name	Jobtitle							
<input type="checkbox"/>	000004369	0	Sub	Princess	Ariel	Active	Anaheim Ducks	Makeup Manager							
<input type="checkbox"/>	000018266	0	Sub	Princess	Belle	Active	Anaheim Ducks	Band Member I							
<input type="checkbox"/>	000003797	0	Sub	Daisy	Duck	Active	Anaheim Ducks	Train Conductor							
<input type="checkbox"/>	000011116	0	Sub	Donald	Duck	Active	Anaheim Ducks	Train Conductor							
<input type="checkbox"/>	000004759	0	Sub	Princess	Jasmine	Active	Anaheim Ducks	Band Member II							
<input type="checkbox"/>	000003992	0	Sub	Minnie	Mouse	Active	Anaheim Ducks	Makeup Manager							
<input type="checkbox"/>	000006774	0	Sub	King	Triton	Active	Anaheim Ducks	Train Conductor							
<input type="checkbox"/>	000011961	0	Sub	Snow	White	Active	Anaheim Ducks	Band Member							

Select All

Deselect All

Continue

You can review absence entries individually or select all

Activity Three

- If the absence is correct, select **Reviewed** from the **Review Status** drop down list. The **Reviewed** status flags the absence entry as correct and ready for approval.
- Otherwise, select **Needs Corr** from the **Review Status** drop down list. The **Needs Corr** status initiates an email notification to the employee. You should enter a comment by clicking the link. In your comments, provide a clear explanation or reason for the correction to assist the employee in correcting the entry.

Existing Absence Events										
EmpID	Rcd#	Name	Absence Name	Begin Date	End Date	Duration	Unit Type	Review Status	Entry Comments	Add Comment
1	000004369	0	Princess Ariel	Vacation Take	07/30/2010	07/30/2010	8.00 Hours	Reviewed		Add Comment
2	000004369	0	Princess Ariel	Sick Take	07/30/2010	07/30/2010	8.00 Hours	Needs Corr		Add Comment
3	000018266	0	Princess Belle	Vacation Take	07/28/2010	07/28/2010	8.00 Hours			Add Comment
4	000003797	0	Daisy Duck	Vacation Take	07/28/2010	07/28/2010	8.00 Hours	Reviewed		Add Comment
5	000011116	0	Donald Duck	Sick Take - Self	07/27/2010	07/28/2010	16.00 Hours			Add Comment
6	000004759	0	Princess Jasmine	Vacation Take	07/16/2010	07/21/2010	32.00 Hours	Reviewed		Add Comment
7	000004759	0	Princess Jasmine	Funeral Take	07/28/2010	07/28/2010	4.00 Hours		Entry Comments	Add Comment
8	000004759	0	Princess Jasmine	CTO Take	07/15/2010	07/15/2010	4.00 Hours	Reviewed		Add Comment
9	000004759	0	Princess Jasmine	CTO Take	06/17/2010	06/17/2010	4.00 Hours	Reviewed		Edit Comment
10	000004759	0	Princess Jasmine	CTO Take	07/14/2010	07/14/2010	4.00 Hours	Reviewed		Add Comment
11	000003992	0	Minnie Mouse	Vacation Take	06/09/2010	06/10/2010	16.00 Hours			Add Comment
12	000006774	0	King Triton	Vacation Take	07/06/2010	07/07/2010	16.00 Hours			Add Comment
13	000006774	0	King Triton	Jury Duty Take	07/12/2010	07/12/2010	8.00 Hours			Add Comment
14	000011961	0	Snow White	Sick Take - Family	07/09/2010	07/09/2010	8.00 Hours		Entry Comments	Add Comment
15	000011961	0	Snow White	Sick Take - Self	07/08/2010	07/08/2010	8.00 Hours			Add Comment

Submit

When complete, click the submit button to save. Notify your approver that the employees are ready for approval.

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: [Q](#)

Empl Rcd#: [Q](#)

CSU Unit: [Q](#)

Department: [Q](#)

Period ID: 2012-09 [Q](#)

[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

Reports

As part of your monthly activities, you will use these reports to:

1. Track absence entries and their status
2. Track employees who have not reported "No Leave Taken" or any other type of absence in your department
3. Track unapproved absences

Please see the *full business process guide* posted on the Absence Management Self-Service page of the Payroll website.

Getting Help

- Click the [Click for Instructions](#) link on the PeopleSoft Timekeeper pages
- Review the Timekeeper section on the AMSS page on Payroll's website for full business process guides
- Email our Absence Management Self-Service email address payroll-selfservice@calpoly.edu
- Call Payroll Services at 756-2605



Questions?