

Absence Management Self-Service (AMSS)

Employee Absence Entry Training

Cal Poly
Payroll Services
Lori Serna

What you will learn today...

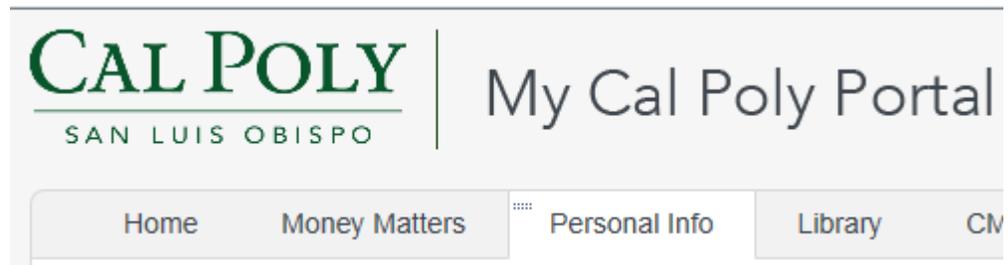
- My Cal Poly Portal enhancements
- How to enter absences using self-service
- Where to enter pay requests using self-service
- What types of leave/pay still require a paper timesheet
- What are the due dates each month
- What information Payroll needs from you
- How to find additional help and resources

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 July 01, 2013. Please Note: These balances may not reflect pending adjustments or current month activity.

Sick Leave Balance:	243.500 Hours
Vacation Balance:	264.417 Hours
Personal Holiday:	1 Day

[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 once place, such as:

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

My Job Tasks

 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
 Recruitment Tools and Information	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



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 →](#)

Report and View Absences

Report and View Absences

Abby Absence
999999999 0

Admin Analyst/Spclst 12 Mo 1038

Fiscal Svcs-Payroll Services 126200

[Click for Instructions](#)

From Through

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	Absence Duration	Unit Type		
No Leave Taken	<input type="text" value="08/31/2012"/>	<input type="text" value="09/30/2012"/>			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.

Report and View Absences

Report and View Absences

Abby Absence
009999999 0

Admin Analyst/Spclst 12 Mo 1038
Fiscal Svcs-Payroll Services 126200

[Click for Instructions](#)

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="08/31/2012"/>	<input type="text" value="09/30/2012"/>			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

Your employee and job information
*Abby Absence is entering in record 0

Report and View Absences

Report and View Absences

Abby Absence
009999999 0

Admin Analyst/Spclst 12 Mo 1038
Fiscal Svcs-Payroll Services 126200

[Click for Instructions](#)



Instructions on
how to use this
page

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	08/31/2012	09/30/2012			Add Comments + -

Calculate Duration

[Timesheet](#)

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Submit

Report and View Absences

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Abby Absence
009999999 0

Admin Analyst/Spclst 12 Mo 1038
Fiscal Svcs-Payroll Services 126200

[Click for Instructions](#)

'From' and
'Through' dates
default to the
current pay
period

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	08/31/2012	09/30/2012			Add Comments + -

Calculate Duration

[Timesheet](#)

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Submit

Report and View Absences

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009999999 0

Admin Analyst/Spclst 12 Mo 1038
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[Click for Instructions](#)

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="08/31/2012"/>	<input type="text" value="09/30/2012"/>			Add Comments <input type="button" value="+"/> <input type="button" value="-"/>

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

If you change the 'From' and 'Through' dates, you can view absences submitted for prior or future pay periods

Report and View Absences

From Through

Existing Absence Events						
Absence Name	Begin Date	End Date	Absence Duration	Unit Type	Absence Status	Last Updated By
Vacation	06/15/2012	06/15/2012	2.00	Hours	Finalized	Marc Benadiba
Sick - Self	06/19/2012	06/19/2012	1.00	Hours	Finalized	Marc Benadiba
No Leave Taken	07/01/2012	07/31/2012			Finalized	Marc Benadiba
No Leave Taken	08/01/2012	08/30/2012			Approved	Marc Benadiba

Report and View Absences

Abby Absence
00999999 0
Admin Analyst/Spclst 12 Mo 1038
Fiscal Svcs-Payroll Services 126200

[Click for Instructions](#)

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="08/31/2012"/>	<input type="text" value="09/30/2012"/>			Add Comments	<input type="button" value="+"/> <input type="button" value="-"/>

[Timesheet](#)

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Report and View Absences

Report and View Absences

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009999999 0

Admin Analyst/Spclst 12 Mo 1038
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[Click for Instructions](#)

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="08/31/2012"/>	<input type="text" value="09/30/2012"/>			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.

To submit 'No Leave Taken' simply validate the begin and end date reflect the pay period you are submitting for and hit 'submit'

Report and View Absences

Enter New Absence Events									
Absence Name	*Begin Date	*End Date	Balance	*Partial Days	Absence Duration	Unit Type			
Sick - Self	09/10/2012	09/12/2012	171.5	None		Hours	Add Comments	+	-

Calculate Duration

In this example, Abby Absence needs to submit three days of sick leave: 9/10/12 through 9/12/12

She chooses Absence Name "Sick - Self" and immediately her available balance of 171.5 populates

Since she was gone all day, AMSS knows based on her schedule that the value of each day, Monday-Friday is 8 hours. So she clicks on "Calculate Duration" and her Absence Duration now is 24 hours

Enter New Absence Events									
Absence Name	*Begin Date	*End Date	Balance	*Partial Days	Absence Duration	Unit Type			
Sick - Self	09/10/2012	09/12/2012	171.5	None	24.00	Hours	Add Comments	+	-

Calculate Duration

Report and View Absences

Abby Absence also had to take her child to the doctor on 9/18/12

Abby clicks on the + at the end of her 'Sick-Self' row to enter another absence

She selects 'Sick-Family Care' and sees that now her available sick balance is 147.50

Since she was only gone 3 hours, she selects 'Partial Hours' in the Partial Days column. She inputs 3 hours and hits 'Calculate Duration'

Enter New Absence Events										
Absence Name	*Begin Date	*End Date	Balance	*Partial Days	Hours per Day	Absence Duration	Unit Type			
Sick - Self	09/10/2012	09/12/2012	171.5	None		24.00	Hours	Add Comments	+	-
Sick - Family Care	09/18/2012	09/18/2012	147.5	Partial Hours	3.00	3.00	Hours	Add Comments	+	-

Calculate Duration

Since 'Sick-Family Care' requires the her to state the relationship of the family member, the 'Add Comments' link shows up as **RED**

AMSS will not allow her to submit an absence type that requires more information to continue. Abby clicks on 'Add Comments'

Report and View Absences

Enter New Absence Events										
Absence Name	*Begin Date	*End Date	Balance	*Partial Days	Hours per Day	Absence Duration	Unit Type			
CTO Premium Earn	09/08/2012	09/08/2012		Partial Hours	5.00	7.50	Hours	Add Comments	+	-
Sick - Self	09/10/2012	09/12/2012	171.5	None		24.00	Hours	Add Comments	+	-
Sick - Family Care	09/18/2012	09/18/2012	147.5	Partial Hours	3.00	3.00	Hours	Edit Comments	+	-

Finally, Abby received pre-approval to work on Saturday 9/18/12 for compensatory time off (CTO)

According to her collective bargaining agreement, as a non-exempt employee working over 40 hours in one work week, she earns those hours at the premium rate (1.5)

Abby clicks on the + button, and selects 'CTO Premium Earn'

This type of leave requires you to input the 'Hours per Day'. Abby inputs 5 hours and hits 'Calculate Duration'. She can see that the 'Absence Duration' reflects 5 hours x 1.5 = 7.50 hours earned

Absence Event Comments

Enter comments to be associated with the absence event and click the Save Comments button to save them. To return without saving click the Return to Entry Page link.

Please enter relationship of family member:

Save Comments

[Return to Entry Page](#)

Abby types in the box above 'Child' and hits 'Save Comments'

Payroll will be validating all comments entered each month during processing to make sure they are appropriate for each employee's collective bargaining agreements (or Title V for unrepresented employees)

Report and View Absences

From Through

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 Premium Earn	09/08/2012	09/08/2012		Partial Hours	5.00	7.50	Hours	Add Comments	+ -
Sick - Self	09/10/2012	09/12/2012	171.5	None		24.00	Hours	Add Comments	+ -
Sick - Family Care	09/18/2012	09/18/2012	147.5	Partial Hours	3.00	3.00	Hours	Edit 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

Abby has completed entering all her absence events for the month

She hits the 'Submit' button

And receives confirmation

Submit Confirmation

✓ The Absence(s) were submitted successfully.

OK

Report and View Absences

From Through

Existing Absence Events							Customize	Find	First	1-3 of 3	Last
Absence Name	Begin Date	End Date	Absence Duration	Unit Type	Absence Status	Last Updated By					
CTO Premium Earn	09/08/2012	09/08/2012	7.50	Hours	Submitted						
Sick - Self	09/10/2012	09/12/2012	24.00	Hours	Submitted						
Sick - Family Care	09/18/2012	09/18/2012	3.00	Hours	Submitted						

Enter New Absence Events						
Absence Name	*Begin Date	*End Date	Absence Duration	Unit Type		
No Leave Taken	<input type="text" value="08/31/2012"/>	<input type="text" value="09/30/2012"/>			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.

Abby can now see all her absences submitted for the pay period

Because the timekeeper or manager have not yet completed their review or approval, the trash can icon shows up at the end of each absence row. This means Abby can still safely delete these absences or correct them if she made a mistake

"Absence Status"

Submitted* – the absence has been submitted

Reviewed – the absence has been reviewed by the timekeeper

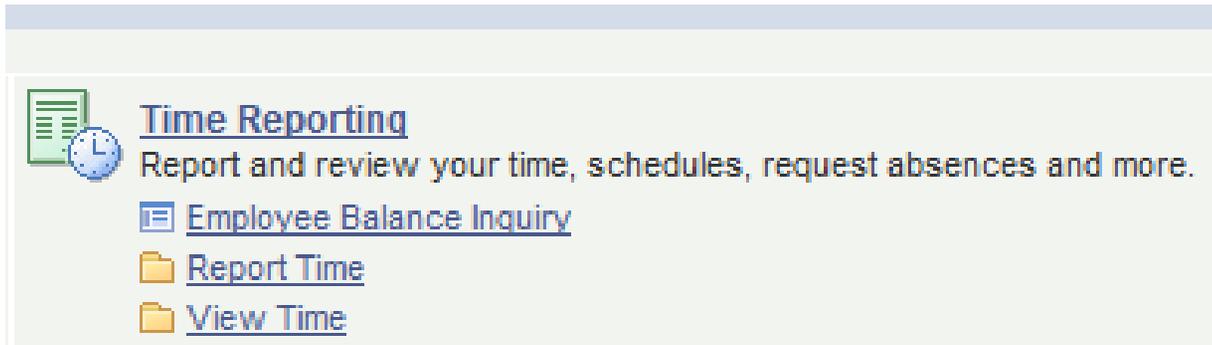
Approved – the absence has been approved by the manager

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

Time Reporting Options



From this menu you have the options to:

- Review your Employee Balance Inquiry page
- Report Time>Report and View Absences
- View Time>Monthly Schedule

Miscellaneous rules on time entry...Prior/Future Entry

- You can enter forgotten absences for prior pay periods **up to 3 months back**...*only* if you had not submitted 'No Leave Taken' for that month
- If you need to change an absence with a status of "Finalized" or change from 'No Leave Taken' for prior pay periods, you must submit a paper pay and leave usage form, the system cannot process
- You can enter future absences **up to two pay periods in advance**

Miscellaneous rules on time entry...No Time Taken

- 'No Time Taken' is the default absence. The Begin and End dates also default to reflect the state pay calendar. If you earned or took no leave, simply hit 'Calculate Duration' on the 'No Time Taken' row and hit submit
- If you are a 10/12 or 11/12 pay plan employee, you must submit 'No Time Taken' even during your scheduled months off. Please submit 'No Time Taken' for those pay periods in advance before you are off campus

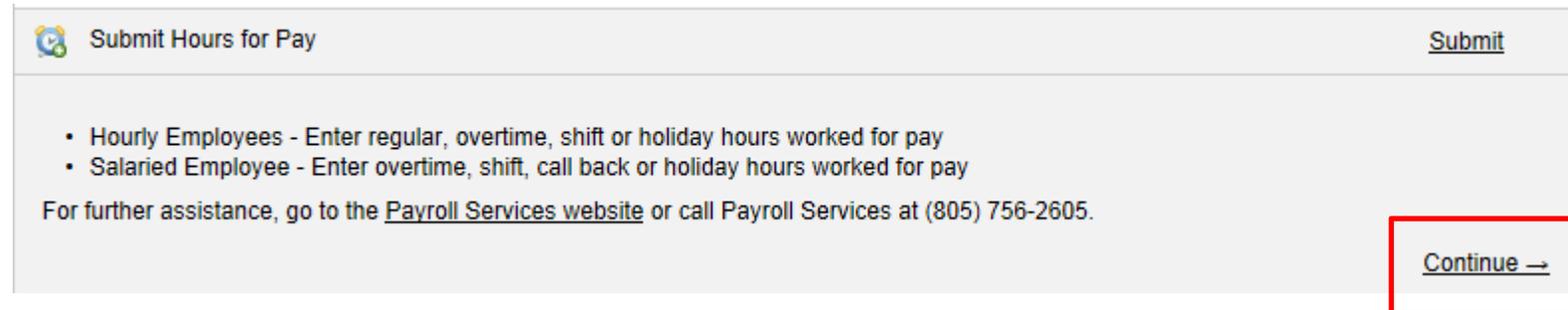
Miscellaneous rules on time entry...Due Dates

- Employees will complete their online entry by the first business day of the month. This is the same day that the paper leave usage forms have been due
- Timekeepers and Approvers have until the third business day of the month to review/approve

Request Hours for Pay

My Pay and Leave Usage Section

Submit Hours for Pay

A screenshot of a web form titled "Submit Hours for Pay". The form has a header bar with a gear icon on the left and a "Submit" button on the right. Below the header, there are two bullet points: "Hourly Employees - Enter regular, overtime, shift or holiday hours worked for pay" and "Salaried Employee - Enter overtime, shift, call back or holiday hours worked for pay". Below the bullet points, there is a line of text: "For further assistance, go to the [Payroll Services website](#) or call Payroll Services at (805) 756-2605." At the bottom right of the form, there is a "Continue →" button, which is highlighted with a red rectangular border.

Submit Hours for Pay Submit

- Hourly Employees - Enter regular, overtime, shift or holiday hours worked for pay
- Salaried Employee - Enter overtime, shift, call back or holiday hours worked for pay

For further assistance, go to the [Payroll Services website](#) or call Payroll Services at (805) 756-2605.

[Continue →](#)

Using Timesheet, enter requests for pay:

- **Hourly Employees:** REG, OT, Shift
- **Salaried Non-Exempt Employees:** OT, Shift, Callback, etc.

*If you need to report hours for pay, see full BPG posted on the Payroll Website in the "Self-Reporter" section: http://afd.calpoly.edu/payroll/amss_pilot.asp

Request Hours for Pay

Can also click on the link in "Report and View Absence":

Enter New Absence Events							
Absence Name	*Begin Date	*End Date	Absence Duration	Unit Type			
No Leave Taken ▾	08/31/2012 	09/30/2012 			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

What Payroll needs to know from you...your schedule

Payroll will be tracking all schedules in Absence Management. If you work something *other* than Monday through Friday, 8 hours per day x FTE (example, you are a ½ time employee, 8 hrs x .50 = 4 hours per day), you are working an **alternate/compressed work schedule**.

Previously we only tracked these schedules for non-exempt employees; now we are tracking for all employees in order to utilize the self-service system.

Schedules

Report schedules and all changes via the "Report of Employee Schedule Change" form

CAL POLY
SAN LUIS OBISPO

Report of Employee Schedule Change

Effective Date: _____
(MM/DD/YYYY)

Instructions: This form is being completed to document official work schedule changes. For more information review the [Schedules FAQs](#). **Effective Date must be a Sunday.** Forward completed document to Payroll Services *prior* to the effective date of the schedule change.

Employee (Last, First MI)	Employee ID	Empl Rcd	Department Name
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Justification for Work Schedule (e.g. Dept business need, ADA accommodation)

1 Week Work Period 2 Week Work Period

1 Week Work Period - Enter total hours worked each day

Sun	Mon	Tues	Wed	Thurs	Fri	Sat	Total Hrs

Collective Bargaining Agreement	Notification Period (# of days)	Verbal and/or Written Notification	Note to Administrators and Employees: The standard State work schedule is Monday - Friday, 8 hours per day. "Alternate" work
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This form can be found on the "Forms" page of the Payroll Website

Resources...

- Click on the [Instructions](#) link on your PeopleSoft Absence entry page
- Review the tutorial videos and guides posted on Payroll Services AMSS web page
- Contact your timekeeper
- Contact your department's Payroll Representative or Payroll Services at 756-2605



Questions?