Absence Management Self-Service (AMSS)
Approver Training
Payroll Services
Lori Sema
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?
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/](http://csumyconnect.calstate.edu/p19152148/)
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
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

<table>
<thead>
<tr>
<th>Leave Type</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sick Leave Balance</td>
<td>187.500 Hours</td>
</tr>
<tr>
<td>Vacation Balance</td>
<td>258.420 Hours</td>
</tr>
<tr>
<td>Personal Holiday</td>
<td>1 Day</td>
</tr>
<tr>
<td>Compensatory Time Off</td>
<td>0.375 Hours</td>
</tr>
</tbody>
</table>
**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

<table>
<thead>
<tr>
<th>My Benefits</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits Summary and Enrollment</td>
<td></td>
</tr>
<tr>
<td>Retirement Plan:</td>
<td>PERS-SS/MED 2%@55</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>My Job Info</th>
<th>View Compensation History</th>
</tr>
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<td>View Current Job and Pay Info</td>
<td></td>
</tr>
</tbody>
</table>
Enhanced Portal

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

If you experience any difficulties accessing the links above, please contact the Service Desk at 756-7000.
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.
Users will be able to see available balances at entry for sick, vacation, CTO, PH etc...

<table>
<thead>
<tr>
<th>Absence Name</th>
<th>*Begin Date</th>
<th>*End Date</th>
<th>Balance</th>
<th>*Partial Days</th>
<th>Absence Duration</th>
<th>Unit Type</th>
<th>Add Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation</td>
<td>10/01/2012</td>
<td>10/01/2012</td>
<td>235.754</td>
<td>None</td>
<td>Hours</td>
<td>Hours</td>
<td>Add Comments</td>
</tr>
<tr>
<td>Sick - Self</td>
<td>10/01/2012</td>
<td>10/01/2012</td>
<td>171.5</td>
<td>None</td>
<td>Hours</td>
<td>Hours</td>
<td>Add Comments</td>
</tr>
<tr>
<td>Personal Holiday</td>
<td>10/01/2012</td>
<td>10/01/2012</td>
<td>1</td>
<td>None</td>
<td>Hours</td>
<td>Days</td>
<td>Add Comments</td>
</tr>
</tbody>
</table>
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

Enter New Absence Events

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

Submit
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.

Message

This absence begin date falls outside the allowable entry window of 7/1/2012 through 12/31/2012. (27500,343)

Only entries for absences within this date range may be entered using self-service. If you have an entry to make that falls outside this range, please call Payroll or ask your manager.
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.
Salaried employee schedules will be input in AMSS...

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

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
Approver Monthly Activity Overview:

1. Employees enter absence events throughout the pay period.
2. Master Payroll Certification approval according to published due dates (3rd week).
3. Approve absence events entered by the 3rd business day of the following pay period. Set absence status to “approved”.

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
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

• 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

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

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

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?