Absence Management Self-Service (AMSS)

Timekeeper 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 timekeeper 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/
<table>
<thead>
<tr>
<th>Roles/Responsibilities</th>
<th>Employee-Self Reporter</th>
<th>Timekeeper/Supervisor</th>
<th>Manager</th>
<th>Payroll</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Enters Absences</strong></td>
<td><strong>Reviews Absences</strong></td>
<td><strong>Approves Absences</strong></td>
<td><strong>Reviews and Finalizes Absences</strong></td>
<td></td>
</tr>
<tr>
<td>by the first day of the</td>
<td>submitted and</td>
<td>by the third</td>
<td>Absences by the 10th of the pay</td>
<td></td>
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<tr>
<td>following pay period</td>
<td>recommends for</td>
<td>business day of the</td>
<td>period</td>
<td></td>
</tr>
<tr>
<td></td>
<td>approval to the</td>
<td>pay period</td>
<td></td>
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<td>enter Absences for the</td>
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</tr>
</tbody>
</table>
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>Employee Info</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>My Leave Balance Overview</strong> as of October 01, 2012. Please Note: These balances may not reflect pending adjustments or current month activity.</td>
</tr>
</tbody>
</table>

<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>

[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

<table>
<thead>
<tr>
<th>Benefits Summary and Enrollment</th>
<th>View</th>
</tr>
</thead>
</table>

| 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

If you experience any difficulties accessing the links above, please contact the Service Desk at 755-7000.
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
Users will be able to see available balances at entry for sick, vacation, CTO, PH etc...

### Enter New Absence Events

<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>Actions</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></td>
<td>Hours</td>
<td>Add Comments</td>
</tr>
</tbody>
</table>

<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>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sick - Self</td>
<td>10/01/2012</td>
<td>10/01/2012</td>
<td>171.5</td>
<td>None</td>
<td></td>
<td>Hours</td>
<td>Add Comments</td>
</tr>
</tbody>
</table>

<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>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Holiday</td>
<td>10/01/2012</td>
<td>10/01/2012</td>
<td>1</td>
<td>None</td>
<td></td>
<td>Days</td>
<td>Add Comments</td>
</tr>
</tbody>
</table>
Users will not be able to submit time they don’t have...

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 To 10/30/2012

Existing Absence Events

<table>
<thead>
<tr>
<th>Absence Name</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Absence Duration</th>
<th>Unit Type</th>
<th>Last Updated By</th>
</tr>
</thead>
</table>

Enter New Absence Events

<table>
<thead>
<tr>
<th>Absence Name</th>
<th>*Begin Date</th>
<th>*End Date</th>
<th>Balance</th>
<th>*Partial Days</th>
<th>Hours per Day</th>
<th>Absence Duration</th>
<th>Unit Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTO Take</td>
<td>10/01/2012</td>
<td>10/01/2012</td>
<td>0.375</td>
<td>Partial Hours</td>
<td>5.00</td>
<td>5.00 Hours</td>
<td></td>
</tr>
</tbody>
</table>

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
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.
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.

Enhancements

Click for Instructions

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

These are your PeopleSoft Timekeeper Options:
### Timekeeper Absence Review

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

<table>
<thead>
<tr>
<th>Select</th>
<th>EmpID</th>
<th>EmpID Rcd</th>
<th>Cur Pd Abs</th>
<th>First Name</th>
<th>Last Name</th>
<th>Status</th>
<th>Dept Name</th>
<th>Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>000004360 0</td>
<td>Sub</td>
<td>princess</td>
<td>Ariel</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Makeup Manager</td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>000018266 0</td>
<td>Sub</td>
<td>princess</td>
<td>Belle</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Band Member I</td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>000003797 0</td>
<td>Sub</td>
<td>Daisy</td>
<td>Duck</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Train Conductor</td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>000011116 0</td>
<td>Sub</td>
<td>Donald</td>
<td>Duck</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Train Conductor</td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>000004759 0</td>
<td>Sub</td>
<td>princess</td>
<td>Jasmine</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Band Member II</td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>000003992 0</td>
<td>Sub</td>
<td>Minnie</td>
<td>Mouse</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Makeup Manager</td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>000006774 0</td>
<td>Sub</td>
<td>King</td>
<td>Triton</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Train Conductor</td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>000011961 0</td>
<td>Sub</td>
<td>Snow</td>
<td>White</td>
<td>Active</td>
<td>Anaheim Ducks</td>
<td>Band Member</td>
<td></td>
</tr>
</tbody>
</table>

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.

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
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.
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?