Absence Management Self-Service (AMSS)

Employee Absence Entry Training

Cal Poly Payroll Services
Lori Sema
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
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.

<table>
<thead>
<tr>
<th>Leave Type</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sick Leave Balance</td>
<td>243.500 Hours</td>
</tr>
<tr>
<td>Vacation Balance</td>
<td>264.417 Hours</td>
</tr>
<tr>
<td>Personal Holiday</td>
<td>1 Day</td>
</tr>
</tbody>
</table>

View All Leave Balances
Enhanced Portal

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**
- **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 786-7000.
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.

Continue →
## Report and View Absences

### Abby Absence

- 999999999       0
- Admin Analyst/Spclst 12 Mo  1038
- Fiscal Svcs-Payroll Services  126200

[Click for Instructions](#)

### 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>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Enter New 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>Add Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Leave Taken</td>
<td>08/31/2012</td>
<td>09/30/2012</td>
<td></td>
<td></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](#)
Your employee and job information *Abby Absence is entering in record 0
Report and View Absences

Abby Absence
0099999999
Admin Analyst/Spclst 12 Mo 1038
Fiscal Svcs-Payroll Services 126200

Click for instructions

Instructions on how to use this page

### Existing Absence Events

<table>
<thead>
<tr>
<th>Absence Name</th>
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</tr>
</thead>
</table>

- No Leave Taken
  - Begin Date: 08/31/2012
  - End Date: 09/30/2012

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
Report and View Absences

Abby Absence
0099999999 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

Report and View Absences

From: 08/31/2012 09:30/2012

Existing Absence Events

Enter New Absence Events

No Leave Taken

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

Absence Name: Abby Absence
009999999
Admin Analyst/Spclst 12 Mo 1038
Fiscal Svcs-Payroll Services 126200

Click for instructions

Report and View Absences

From: 08/31/2012
Through: 09/30/2012

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>
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<th>End Date</th>
<th>Absence Duration</th>
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No Leave Taken
08/31/2012
09/30/2012

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
### Existing Absence Events

<table>
<thead>
<tr>
<th>Abssence Name</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Absence Duration</th>
<th>Unit Type</th>
<th>Absence Status</th>
<th>Last Updated By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation</td>
<td>06/15/2012</td>
<td>06/15/2012</td>
<td>2.00 Hours</td>
<td>Hours</td>
<td>Finalized</td>
<td>Marc Benadiba</td>
</tr>
<tr>
<td>Sick - Self</td>
<td>06/19/2012</td>
<td>06/19/2012</td>
<td>1.00 Hours</td>
<td>Hours</td>
<td>Finalized</td>
<td>Marc Benadiba</td>
</tr>
<tr>
<td>No Leave Taken</td>
<td>07/01/2012</td>
<td>07/31/2012</td>
<td></td>
<td></td>
<td></td>
<td>Marc Benadiba</td>
</tr>
<tr>
<td>No Leave Taken</td>
<td>08/01/2012</td>
<td>08/30/2012</td>
<td></td>
<td></td>
<td>Approved</td>
<td>Marc Benadiba</td>
</tr>
</tbody>
</table>
To submit ‘No Leave Taken’ simply validate the begin and end date reflect the pay period you are submitting for and hit ‘submit’
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.
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’.

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’.
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
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).
Abby has completed entering all her absence events for the month.

She hits the ‘Submit’ button.

And receives confirmation.
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*
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.
My Pay and Leave Usage Section
Submit Hours for Pay

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](http://afd.calpoly.edu/payroll/amss_pilot.asp)
Can also click on the link in “Report and View Absence”: 
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.
Report schedules and all changes via the “Report of Employee Schedule Change” form

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?