

# Manager Self Service Training Manual for Absence Management

ORACLE/PEOPLESOFT

**VERSION 9.1**

Human Resource/Payroll  
How-To Guide

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*Appointments are recommended in order to provide employees with the best possible service.*

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The duties of the NDSU Budget Office and Ag Budget Office include the funding and budget portions of payroll forms. They are responsible for processing funding changes, budget adjustments and retroactive distributions in relation to payroll. They are also responsible for the activation and/or inactivation of Combination Codes.

# INTRODUCTION

Absence Management is a module in Oracle/PeopleSoft HRMS used by all employees who earn leave to request time off. This applies to all types of leave: Annual, Sick, Dependent Sick, Comp Time, Jury Duty, Military and Funeral.

An absence can be requested for an event that occurred in the past (e.g. a sick day) or for an event to occur in the future, such as annual leave. All absences should be entered by the employee, and approved by the supervisor, no later than the end of the pay period in which the absence occurs.

An absence cannot be requested for a date an employee is not scheduled to work.

Employee balances reflect the pay period of the most recent check. For example, if today is April 22; the last paycheck was April 15th, the pay period for April 15th paycheck is March 16th-31st. The leave balances would be current as of March 31st. Please contact the Human Resources/Payroll Office if you feel your balances are incorrect.

**Leave Balances will no longer appear on your View Paycheck in Employee Self-Service. Instead, they can be viewed in Employee Self Service on the Employee View Absence Balances screen.**

***Navigation: Main Menu > Self Service > Benefits > Absence Balances***

**NOTE: During the initial rollout, leave balances from the old method of taking leave will not display in Absence Management until after the first payroll runs under the new method. This is a planned part of the conversion process.**

The business process under the new process is as follows:

1. Employee logs in to HRMS and enters a leave request before (for planned absences) or after (for unplanned absences) an event.
2. The supervisor logs in to HRMS and reviews absence approvals as needed.
3. The supervisor has three choices for taking action on the request:
  - a. Approve – the employee receives an approval email.
  - b. Deny – the employee receives a denial email.
  - c. Push back – the employee receives an email requesting modification of the request.
4. Approved requests are sent to payroll and paid the next payday.

**NOTE: Once an absence request has been approved, it cannot be canceled by the employee or the supervisor. Let your supervisor know if you need to cancel a submitted or approved absence request.**

***Please Note: All overtime for benefited employees will need to be sent to HR/Payroll for entry. It will not be recorded in Time & Labor and the department will not have the ability to enter those hours themselves. Non-benefited, hourly positions will have overtime calculated when the hours are entered either via the Web Clock, physical time clock, FAMIS or paper time slip entry.***

**NOTE FOR LATE LEAVE:** There will be no more late leave slips sent to HR/Payroll for entry. Late leave will be submitted by the employee, approved by the supervisor and reflect on the next available payday.

**NOTE FOR NEGATIVE LEAVE:** If the employee is requesting an absence for more hours than what his/her Current Balance displays, meaning the employee will have a negative leave balance, he/she must have a conversation with and receive permission from you as the supervisor before submitting the leave request. If you as the supervisor are allowing the employee to have a negative balance, a negative leave agreement must be on file in HR/Payroll before you approve the employee's request. Contact HR/Payroll for the negative leave agreement template.

**NOTE FOR TERMINATING EMPLOYEES:** Annual and sick leave (if applicable) will pay out on the employee's last regular paycheck. This is a change from previous practice of having the leave payout on the paycheck after the last regular paycheck. If the employee has not submitted leave requests timely and/or if the leave requests have not been approved by the supervisor, the incorrect annual and sick leave (if applicable) balance will pay out on the employee's last regular paycheck. It will be very important to have all leave requests submitted and approved timely.

# APPROVING, DENYING AND PUSHING BACK LEAVE REQUESTS

Employees are expected to log in to Oracle/PeopleSoft HRMS to record absences and approve absences. Employees can navigate to Oracle/PeopleSoft HRMS from the NDSU home page. From the NDSU Index at the bottom of the NDSU home page, select letter “H”. Select the Human Resources and Payroll link. On the right side of the HR/Payroll home page is a green button labeled “Employee Self-Service”. Selecting that green button will take you to the Oracle/PeopleSoft HRMS page. Enter your user ID and password to log in. If you do not know your user ID or password, or are having difficulty logging in to HRMS, please contact the NDUS Help Desk at 866-457-6387 for assistance. The HR/Payroll office does not have user ID or password information.

Once logged in, click the Absence Approval Required Link on the home page, or you can navigate to the Absence Request screen.

**Navigation: Main Menu > Manager Self Service > Time Management > Approve Time and Exceptions > Absence Requests**

Favorites Main Menu > Manager Self Service > Time Management > Approve Time and Exceptions > Absence Requests

## Absence Requests

Network Services Mgr

Select the requestor's name link to approve or deny the request. You can view the monthly calendar for your direct reports by selecting the View Monthly Calendar link. To view all requests or previously approved/denied requests, use the Show Requests by Status and select the Refresh button.

\*Show Requests by Status: Pending Refresh

Name	Employee ID	Job Title	Absence Name	Start Date	End Date	Status	Submitted
<a href="#">Shelby Smith</a>		Network Engineer	Annual Leave	08/29/2016	08/29/2016	Submitted	08/29/2016
		Senior Network Analyst	Annual Leave	11/09/2016	11/10/2016	Submitted	07/27/2016
		Network Architect	Annual Leave	08/11/2016	08/15/2016	Submitted	05/06/2016
		Network Architect	Annual Leave	07/28/2016	07/29/2016	Submitted	05/06/2016

Go To [View Monthly Calendar](#)

This will bring up a list of all absence requests pending your approval for the employees that report to you. It will show the following absences:

- Approved
- Denied
- Pending

If there are no Absence Requests pending, the system will display a message indicating there are no results to display.



Choose an employee's Absence Request by clicking on the hyperlinked name. The following screen displays, detailing the request:

Favorites Main Menu > Manager Self Service > Time Management > Approve Time and Exceptions > Absence Requests

### Approve Absence Request

## Request Details

Shelby Smith  
Network Engineer  
Review the details for this request and either approve, deny or submit for rework. You may also enter optional comments about each approval choice.

Absence Detail ?	
Start Date :	08/29/2016
End Date :	08/29/2016
Absence Name :	Annual Leave
Partial Days :	None
Duration :	8.00 Hours
	Current Balance : 285.97 Hours**

Additional Information	
Start Time:	End Time:

Workflow	
Status :	Submitted

Comments	
Requestor Comments :	
Approver Comments :	Have Fun!

Go To [View Absence Request History](#) [View Absence Balances](#) [View Monthly Calendar](#)

[Return to Absence Requests](#)

\*\*Disclaimer The current balance does not reflect absences that have not been processed.

Note the Current Balance field, in relation to the Duration of hours being requested. **If the employee is requesting an absence for more hours than what his/her Current Balance displays, meaning the employee will have a negative leave balance, he/she must have a conversation with and receive permission from you as the supervisor before submitting this leave request. If you as the supervisor are allowing the employee to have a negative balance, a negative leave agreement must be on file in HR/Payroll before you approve the employee's request. Contact HR/Payroll for the negative leave agreement template.**

Add any Approver Comments (optional, not required).

If the request is acceptable, choose the “**Approve**” button. The request will automatically go forward to be processed on the next payroll or the appropriate payroll if it is future-dated.

If the request is not acceptable, choose the “**Deny**” button. The request will go away not be processed.

If the request may be acceptable but needs modification for any reason (Absence Name is wrong type of leave, number of hours are not correct, leave request will cause employee to be negative without discussion and approval first), choose the “**Push Back**” button. This will push the request back to the employee’s level for correction/modification. Once corrected, the employee will submit it again for supervisor approval.

# VIEWING ABSENCE REQUEST HISTORY

Supervisors may need to view absence requests their employees have made.

**Navigation: Main Menu > Manager Self Service > Time Management > View Time > Absence Request History**

This will display a list of employees reporting to you. (Employee's reporting to you is populated automatically by the system via Job Data "Reports To" field.) The **Employee Reporting as of** date will default to today's date. This date can be changed once you are in the "Absence Request History Page" of the selected employee.

**Select** the employee you wish to view.

Favorites | Main Menu > Manager Self Service > Time Management > View Time > Absence Request History

### Absence Request History

**Employee Selection Criteria**  
Select the employee you'll be working with. You can initiate transactions only for employees who reported to you as of the date you entered on this page.

Employee Reporting as of

Tricia Johnson's employees							Personalize	First	1-4 of 4	Last
Select	Name	Empl ID	Job	Empl Status	HR Status	Position				
<input type="button" value="Select"/>	Elizabeth Thompson		0	Active	Active					
<input type="button" value="Select"/>	Kari Schmitz-Eilertson		0	Active	Active					
<input type="button" value="Select"/>	Laura Garske-Hermanson		0	Active	Active					
<input type="button" value="Select"/>	Tina Berger		0	Active	Active					

Change the **From:** and **Through:** date ranges as desired and click the **“Refresh”** button. The Absence Requests for that date range display. Not that only requests with a Status of **Push Back** can be opened for editing on this page, all other Status are not able to be edited. Select the hyperlink of the Absence Name if you would like to view the specific details of the request.

[Favorites](#) | [Main Menu](#) > [Manager Self Service](#) > [Time Management](#) > [View Time](#) > [Absence Request History](#)

## Absence Request History

Shelby Smith

Specify the date range of interest. To retrieve a complete history, leave From and Through dates blank and select the Refresh button. Select the absence name link to view request details. Select edit button to modify or delete the request.

From :   Through :

Absence Request History				
Absence Name	Status	Start Date	End Date	Edit
<a href="#">Annual Leave</a>	Approved	10/03/2016	10/03/2016	<input type="button" value="Edit"/>
<a href="#">Sick Leave</a>	Approved	09/26/2016	09/26/2016	<input type="button" value="Edit"/>
<a href="#">Annual Leave</a>	Approved	09/20/2016	09/20/2016	<input type="button" value="Edit"/>
<a href="#">Annual Leave</a>	Saved	09/08/2016	09/08/2016	<input type="button" value="Edit"/>
<a href="#">Annual Leave</a>	Approved	09/02/2016	09/02/2016	<input type="button" value="Edit"/>
<a href="#">Annual Leave</a>	Push Back	09/01/2016	09/01/2016	<input type="button" value="Edit"/>
<a href="#">Annual Leave</a>	Saved	08/30/2016	08/30/2016	<input type="button" value="Edit"/>
<a href="#">Annual Leave</a>	Submitted	08/29/2016	08/29/2016	<input type="button" value="Edit"/>
<a href="#">Annual Leave</a>	Approved	08/26/2016	08/26/2016	<input type="button" value="Edit"/>
<a href="#">Annual Leave</a>	Approved	08/25/2016	08/25/2016	<input type="button" value="Edit"/>

[Return to Direct Reports](#)

# VIEWING AN EMPLOYEE'S ABSENCE BALANCES

Supervisors may need to view absence balances for their employees.

**Navigation:** *Main Menu > Manager Self Service > Time Management > View Time > Absence Balances*

This will display a list of employees reporting to you. (Employee's reporting to you is populated automatically by the system via Job Data "Reports To" field.) The **Employee Reporting as of** date will default to today's date.

**Select** the employee you wish to view.

Favorites | Main Menu > Manager Self Service > Time Management > View Time > Absence Request History

### Absence Request History

Employee Selection Criteria  
Select the employee you'll be working with. You can initiate transactions only for employees who reported to you as of the date you entered on this page.

Employee Reporting as of 03/17/2017

Tricia Johnson 's employees

Select	Name	Empl ID	Job	Empl Status	HR Status	Position
<input type="button" value="Select"/>	Elizabeth Thompson		0	Active	Active	
<input type="button" value="Select"/>	Kari Schmitz-Ellertson		0	Active	Active	
<input type="button" value="Select"/>	Laura Garske-Hermanson		0	Active	Active	
<input type="button" value="Select"/>	Tina Berger		0	Active	Active	

Once you have selected the employee, the following page will display the employee's balances.

Favorites | Main Menu > Manager Self Service > Time Management > View Time > Absence Balances

### View Absence Balances

Shelby Smith

View current absence entitlement balances. Current balances do not reflect absence requests that have not been processed by payroll. For more details please contact your absence administrator.

Absence Entitlement Balances

Current Balances Entitlement Keys 1

Entitlement Name	Balance as of 12/31/2016	From	To	Accrual Period
Sick Entitlement	1367.99 Hours	01/01/2016	12/31/2016	Year to Date
Annual Entitlement	350.25 Hours	01/01/2016	12/31/2016	Year to Date

Go To [Forecast Balance](#)

From here you can also forecast the balance for an employee to see what the balance will be in the future.

Click the Forecast Balance hyperlink.

The following page will display:

## View Absence Balances

---

### Forecast Balance



Enter As of Date and Absence Name. Then select the Forecast Balance button.

**Forecast Balance**

As of Date :

\*Absence Name :  **Current Balance : 267.03 Hours\*\***

[Return to View Absence Balances](#)

\* Required Field

\*\*Disclaimer The current balance does not reflect absences that have not been processed.

Enter the **As of Date** for the date in the future you wish to forecast the balance.

Select the **Absence Name** from the drop down.

Select the **"Forecast Balance"** button. The system will calculate and display the results of the calculation for the projected date. **Forecasted balance will include all Leave that has been previously requested.**

Select the **Return to View Absence Balances** hyperlink to return to the list of employees.

## Absence Management Queries

The HE Leave Accrual query will no longer be used for departments to monitor leave balance information from 4/1/17 onward. That query could still be run for leave information from PPE 3/31 and earlier.

Going forward there are Absence Management queries that can be run at the department level to monitor leave balance information.

Navigation to the HE Query page is Main Menu-Reporting Tools-Query-HE Query Pages. The queries are located on the Absence tab. Most of the queries ask for a Calendar Group ID when entering the parameters. That is similar to the pay period end date. For leave information for PPE 4/15, paid on 4/28, the Calendar Group ID you will select/enter will be **20170415**.

As we run future payrolls, you will select that Calendar Group ID to be 20170430 and 20170515 so on, so that you are selecting the correct pay period leave information.

Below are the query names and a description of the information it generates:

[NDU\\_AB\\_APPROVED\\_REQ\\_DT\\_RNG](#)-View Absence Requests that have been approved for a selected pay period or date range

[NDU\\_AB\\_PERIOD\\_LV\\_ERN\\_ID](#)-View leave earned for a selected pay period or date range

[NDU\\_AB\\_PERIOD\\_LV\\_TKN\\_ID](#)-View leave taken for a selected pay period or date range

[NDU\\_AB\\_PRD\\_LV\\_BALS\\_DT\\_RNG](#)-View leave earned, taken and adjusted for a selected pay period or date range

[NDU\\_AB\\_YTD\\_LV\\_BALS\\_DT\\_RNG](#)-View year-to-date leave earned, taken and adjusted for a selected pay period or date range

[NDU\\_AB\\_YTD\\_LV\\_BALS\\_NEG](#)-View negative year-to-date leave balances for annual, sick, comp time and any dependent sick leave over 80 hours

# REQUEST ABSENCE ON BEHALF OF EMPLOYEE

Occasionally it may be necessary for the supervisor to request an absence on behalf of an employee. This would be a rare occurrence brought on by unforeseen circumstances; it should not be a common practice.

**Navigation:** *Main Menu > Manager Self Service > Time Management > Report Time > Absence Request*

**Select** the employee to request an absence for.

Enter the **Start Date** and **Absence Name**. The below screen will display:

Favorites | Main Menu > Manager Self Service > Time Management > Report Time > Absence Request

## Request Absence

Shelby Smith

Enter Start Date and Absence Name. Then complete the rest of the required fields before submitting or save for later your request.

**Absence Detail** ?

\*Start Date : 08/31/2016 [View Monthly Calendar](#)

End Date : 08/31/2016

\*Absence Name : Funeral Leave

Partial Days : None

Duration : 8.00 Hours

[Calculate Duration](#)

**Additional Information**

Start Time: End Time:

**Workflow**

Allow Request By : Employee and Manager

Request As : Employee

**Comments**

Requestor Comments :

Go To [View Absence Request History](#) [View Absence Balances](#)

[Submit](#) [Save for Later](#) [Return to Direct Reports](#)

\* Required Field

Enter the appropriate information for **End Date** and **Partial Days** (if applicable) and **Calculate Duration**.

**Request as: Employee (this is recommended)** - it will automatically be approved by the supervisor.

**Request as: Manager** – it will need to approved by the supervisor's supervisor who entered the request because as a supervisor requesting it they also cannot approve it.



If you choose **Request As: Employee** the request will be submitted and approved. See below it shows the request submitted by employee and approved by the supervisor.

**Status:** Approved

**Employee will receive an email notifying them this absence is submitted and approved on their behalf.**

Workflow			
Status :	Approved		
Allow Request By :	Employee and Manager		
Request As :	Employee		

  

Request History <span style="float: right;">Personalize   First</span>			
Status	Name	Date	Comments
Submitted	Kelli Heiser	08/31/2016	Submitted as Request As: Employee
Approved	Catherine Greicar	08/31/2016	

If you choose **Request As: Manager** the request will be submitted and approved. See below it shows the request submitted by employee and approved by the supervisor.

**Status:** Submitted

This request must be approved by the supervisor's supervisor. Since the absence was requested as the supervisor, the supervisor can't approve it and it must move to the next supervisor.

**Employee will NOT receive an email notifying them this absence is submitted and approved on their behalf. The employee's supervisor will receive an email after the second supervisor has approved this request.**

Workflow			
Status :	Submitted		
Allow Request By :	Employee and Manager		
Request As :	Manager		

  

Request History <span style="float: right;">Personalize   First</span>			
Status	Name	Date	Comments
Submitted	Catherine Greicar	08/31/2016	

# DELEGATE APPROVAL ABSENCE

Managers have the ability to delegate their approval of absence to others.

The person delegated to is called the proxy.

Delegations can be made for a specific time frame or can be open ended.

When the delegation is submitted, the proxy will receive an email notification. The proxy must accept the delegation in order to be able to perform the task. Once accepted, the delegation remains until the end date is reached or until the delegator revokes the delegation.

**Navigation: Main Menu > Self Service > Manage Delegation**

Favorites Main Menu > Self Service > Manage Delegation

## Manage Delegation

Michelle Smith

Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.

[Learn More about Delegation](#)

Select *Create Delegation Request* to choose transactions to delegate and proxies to act on your behalf.

[Create Delegation Request](#)

Select *Review My Proxies* to review the list of transactions that you have delegated and the proxy for each transaction.

[Review My Proxies](#)

**Create Delegation Request:** Enter the dates for your delegation request.

Favorites Main Menu > Self Service > Manage Delegation

## Create Delegation Request

### Select Transactions

Michelle Smith  
NDUS SITS Dir/AD/Asst Dir

Select the transactions that you want to delegate to a proxy. You can select one or many transactions.

Delegate Transactions	
Transaction	
<input type="checkbox"/> Manage Approve Payable Time	
<input type="checkbox"/> Manage Approve Reported Time	
<input type="checkbox"/> Manager Absence Approve	←
<input type="checkbox"/> Termination Approve	
<input type="checkbox"/> Termination Initiate	

[Select All](#) [Deselect All](#)

←

Select **Manager Absence Approve**, or other delegation transactions as needed.

Click **Next**: The Select Proxy by Hierarchy page will show. This page displays persons within your hierarchy that you can select as proxies. Select the radio button next to the name to select that person as a proxy. You can also select the Search by Name hyperlink to search for proxies outside your hierarchy.

Click **Next** and **Submit**. *The proxy you selected will receive an email and must go to Manage Delegation to accept the delegation.*

Once you have delegated to a proxy you no longer will be able to Approve Absences, your proxy or your supervisor will have to approve absences for the employees who report to you.