Manager Self Service Training Manual for Absence Management

Oracle/PeopleSoft
Version 9.1

Human Resource/Payroll How-To Guide
# TABLE OF CONTENTS

- **Human Resources/Payroll Contact Guide** ................................................................. 2
- **NDSU Budget Office Contact Guide** ......................................................................... 4
- **Ag Budget Office Contact Guide** .............................................................................. 4

**Introduction** .................................................................................................................... 5

- Approving, Denying and Pushing Back Leave Requests ................................................. 7
- Viewing Absence Request History .................................................................................. 10
- Viewing an Employee’s Absence Balances .................................................................... 12
- Absence Management Queries ......................................................................................... 14
- Request Absence on Behalf of Employee ........................................................................ 15
- Delegate Approval Absence .............................................................................................. 17
Appointments are recommended in order to provide employees with the best possible service.

Colette Erickson – Director of HR/Payroll  
E-mail: Colette.Erickson@ndsu.edu  
Salary administration, FMLA, and Shared Leave contact, grievance, policy interpretation, Responsibility Review process, PeopleSoft HRMS security access, employee relations and supervisor coaching.

Jill Stevens - Office Assistant  
E-mail: ndsu.hr@ndsu.edu  
Receptionist, appointment scheduling, non-benefited hiring paperwork, website maintenance, discount ticket sales, Genuine Leadership program and Quarter Century Club Banquet.

Tina Berger - Payroll/Benefits Specialist  
E-mail: Tina.Berger@ndsu.edu  
Benefits deductions processing and reconciliation.

Sheila Tindall – Senior Employment Records Technician  
E-mail: Sheila.Tindall@ndsu.edu  
Benefited hiring forms, benefited change forms, summer salary, early employee ID requests and contract pay-over-12 option, Daycare newsletters and billing.

Melissa Kearns – HR Office Assistant  
E-mail: Melissa.J.Kearns@ndsu.edu  
HR recruitment support, Tuition Waivers, department billing, cost transfers, employment records management.

Noah Fischer — Associate Director of Employee Development  
E-mail: Noah.Fischer@ndsu.edu  
Leave administration, ADA, ACA, training administration, performance management, salary administration/compensation, employee relations, unemployment, compliance and special projects.

Laura Garske-Hermanson – International Payroll Specialist  
E-mail: Laura.Garske-Hermanson@ndsu.edu  
International employment eligibility, international tax treaties and tax status.

Rachel Knudson – Benefits Coordinator  
E-Mail: Rachel.Kudson@ndsu.edu  
Benefits administration, COBRA processing, exit interviews, retirements and Supplemental Retirement Accounts.

Stacy Vetter – Employment Records Technician  
E-Mail: Stacy.Vetter@ndsu.edu  
Graduate assistants and part-time academic hiring and change forms, DCE and summer school payments, direct deposits, coaches cars/travel logs, taxable meals/moving expenses and employment verifications.
Vacant – Associate Director of Payroll  
E-mail: ndsu.payroll@ndsu.edu  
Payroll management for university, W-2 process oversight, paycheck adjustments, off-cycle checks, Employee Self Service, Manager Self Service, payroll processes and procedures.

Julie Giffey – Employment Records Technician  
E-mail: Julie.Giffey@ndsu.edu  
8000/9000 job bands hiring, change forms, time slips and leave slips.

Cindy Breyer – Recruitment Specialist  
E-mail: Lucinda.Breyer@ndsu.edu  
Recruitment and retention, onboarding process, PeopleAdmin training, support and administration, and benefits assistance.

Kari Schmitz-Eilertson – Payroll Specialist  
E-mail: Kari.Schmitz.Eilertson@ndsu.edu  
Payroll checks, Worker’s Compensation, wage garnishments, W-2 reprints and payroll voucher/vendor check processing.

Jill Spacek – Associate Director of Recruitment and Administration  
E-mail: Jill.Spacek@ndsu.edu  
Recruitment process, employee relations, grievance coordination, job family assignment and departmental billing.

Liz Thompson – HRMS Technician  
E-mail: Elizabeth.Thompson.1@ndsu.edu  
PeopleSoft HRMS contact, PeopleSoft HRMS security access and training, assist Director of Human Resources and Payroll, Org Charting, salary administration support, PeopleAdmin technical support, position descriptions, website updates, non-benefited position number creation and filing/scanning.
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: Navigator > 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:** Navigator > Manager Self Service > Time Management > Approve Time and Exceptions > Absence Requests

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:
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 and 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:** Navigator > 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.

**Absence Request History**

<table>
<thead>
<tr>
<th>Employee Reporting as of 08/21/2018</th>
<th>Refresh Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colette Erickson’s employees</td>
<td></td>
</tr>
<tr>
<td>Select</td>
<td></td>
</tr>
<tr>
<td>Debra Nolten</td>
<td>00019002</td>
</tr>
<tr>
<td>Jill Spencer</td>
<td>0021441</td>
</tr>
<tr>
<td>Noah Fischer</td>
<td>00192310</td>
</tr>
<tr>
<td>Tricia Johnson</td>
<td>00189918</td>
</tr>
</tbody>
</table>

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.
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.
VIEWING AN EMPLOYEE’S ABSENCE BALANCES

Supervisors may need to view absence balances for their employees.

**Navigation:** Navigator > 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.

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

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](image)

**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_ENT_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:** Navigator > 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:

![Request Absence Form]

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.

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.
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: Navigator > Self Service > Manage Delegation*
Create Delegation Request: Enter the dates for your delegation request.

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.