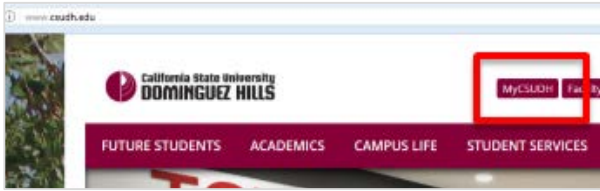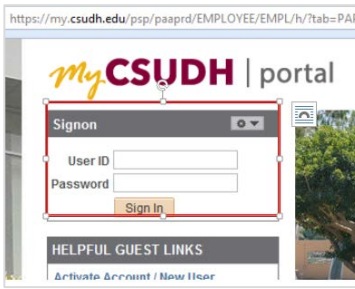# ABSENCE MANAGEMENT TIME KEEPER GUIDE

CONTENTS

OVERVIEW

As of March 2017, the campus will implement the CSU Absence Management module which allows time entry to be entered online into the CMS system. All other documentation, such as jury duty certification, is still required. There are three specific roles in the process, other than the Payroll process:

1. **Employees** enter, review, and submit their Absences in self-service for the current period. Employees can delete Absences when they are in the status of "Submitted" or "Needs Correction". Employees may also be required to delete and re-enter absences based on notifications from Timekeepers and/or Managers.
DEADLINES: ABSENCES FOR THE CURRENT PAY PERIOD MUST BE ENTERED BY THE 25TH OF EACH MONTH. ABSENCES FOR FUTURE PAY PERIODS MAY BE ENTERED AT ANY TIME.

2. **Timekeepers** review the Absences for accuracy and update the Absence status to "Reviewed" for correct Absences or "Needs Correction" which generates a notification to the employee to correct the Absence. Timekeepers may enter an Absence on an employee's behalf which automatically updates to a status of "Reviewed".
DEADLINES: ABSENCES FOR THE CURRENT PAY PERIOD MUST BE COMPLETED BY THE END OF EACH MONTH.

3. **Managers/Approvers** approve absences which have been entered by employees and reviewed by Timekeepers. Managers may also enter an Absence on an employee's behalf. Absences entered by Managers are automatically updated to a status of "Approved" and cannot be corrected by the employee or timekeeper. *Employees automatically receive an email notification when an Absence is entered on their behalf, but not when the Absence is approved.*

DEADLINES: APPROVAL OF ABSENCES FOR THE CURRENT PAY PERIOD MUST BE COMPLETED BY THE 5TH OF THE MONTH FOLLOWING THE PERIOD.

4. **Payroll** processes approved absences, makes corrections to entries, enters all Catastrophic Donation entries, reviews comments and finalizes the absences and accruals. Not all entries by Payroll will create an email notification.
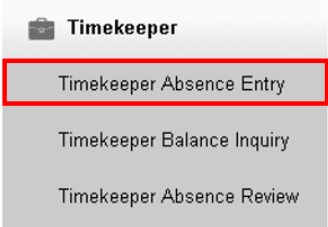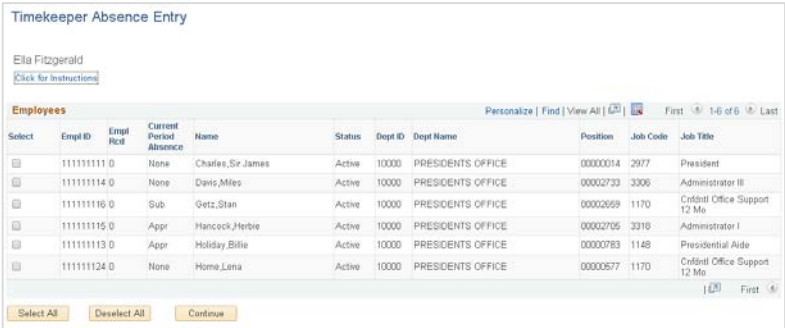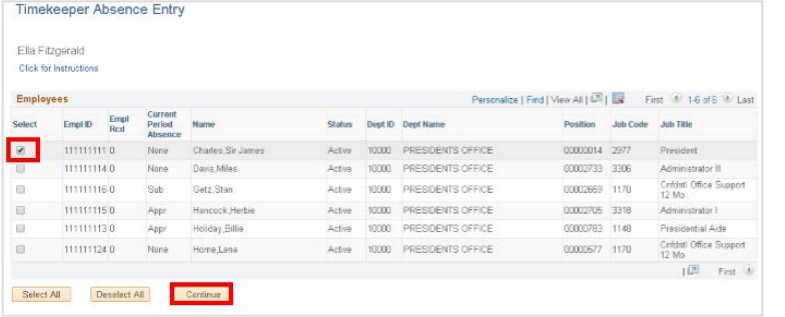
1. LOGIN TO PEOPLESOFT

STEP	ACTION	SCREENSHOT
1	Login to MyCSUDH Portal: https://www.csudh.edu Click the MyCSUDH button on the top right of the screen.	
2	Login to PeopleSoft. Enter your User ID, Password and click the "Sign In" button.	
3	Click "Employee" tab. Next click "**Timekeeper**" button.	
4.	Three links will appear: • Timekeeper Absence Entry • Timekeeper Balance Inquiry • Timekeeper Absence Review Proceed with the steps described in section 2.	

2. NAVIGATE TO THE "REPORT AND VIEW EMPLOYEE ABSENCES" PAGE

The "Report and View Employee Absence" page is used by the Timekeeper to do the following for employees:

- Report "No Leave Taken"
- Record absences
- Delete unapproved absences
- View prior absence transactions.
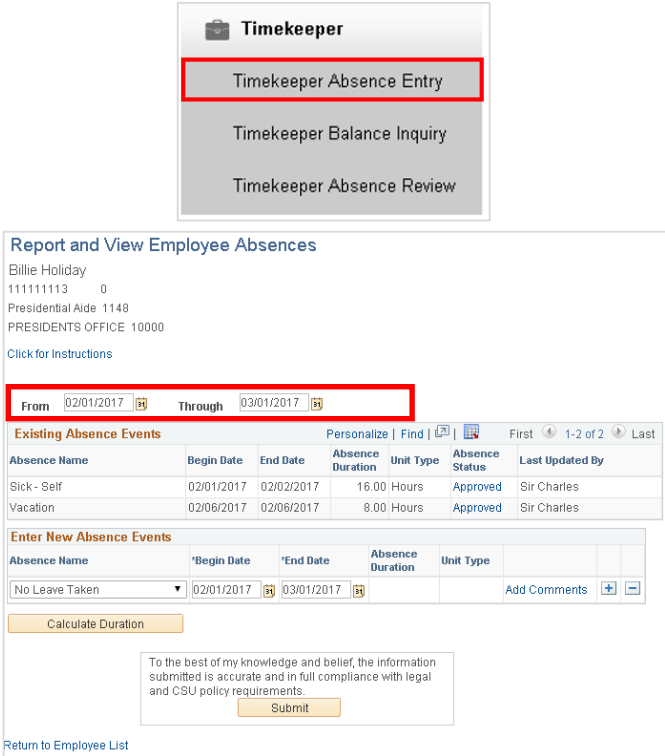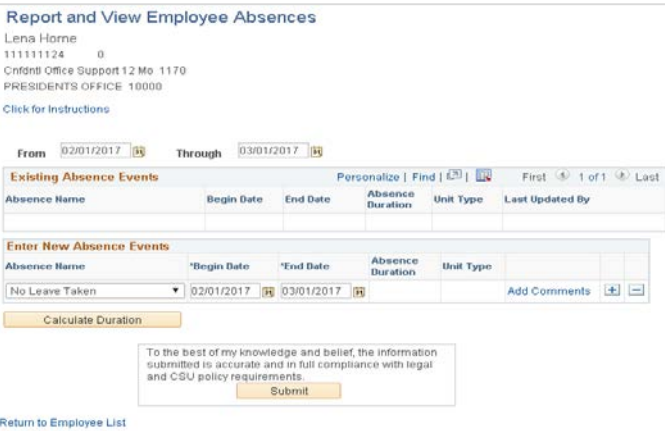
STEP	ACTION	SCREENSHOT
1	From the MyCSUDH portal: Click on "Timekeeper Absence Entry"	
2	The "Timekeeper Absence Entry" page appears Note: If desired, sort the grid by clicking any hyperlinked column title	
3 a	At the employee selection page: • Check individual boxes in the 'Select' column for the employee(s) to enter absences • Select the "Continue" button OR	

STEP	ACTION	SCREENSHOT
3 b	• Click on the "Select All" button to check all employees listed • Select the "Continue" button	
4	The "**Report and View Employee Absences**" page displays Use the navigation links at the bottom of the page to move from one employee to another	
5	Proceed with steps shown in the following section: • Section 2.1 to report "No Leave Taken" for an employee • Section 2.2 to record absences for an employee • Section 2.3 to delete unapproved absences • Section 2.4 to view prior absence transactions for an employee	

2.1. REPORT "NO LEAVE TAKEN" FOR AN EMPLOYEE

STEP	ACTION	SCREENSHOT
1	From the MyCSUDH portal: • Click on "Timekeeper Absence Entry" The "Report and View Employee Absences" page displays • Change the "From" and "Through" dates to show absences from other pay periods	
2	Existing absences for the current pay period will be displayed in the top grid In the bottom grid, the Absence Name "No Leave Taken" defaults to the current pay period Begin Date and End Date • Change the Begin Date and End Date to the dates for which you would like to report "No Leave Taken"	

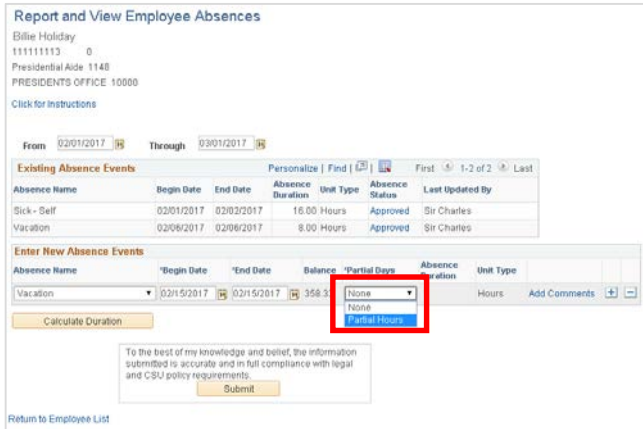| STEP	ACTION	SCREENSHOT
3	Select the "Submit" button	
4	The "Submit Confirmation" page appears Click "OK"	
5	The "Report and View Employee Absences" page lists the "No Leave Taken" Absence Event you have submitted with a *Reviewed* Absence Status and no further action is necessary Use the navigation links at the bottom of the page to move from one employee to another.	
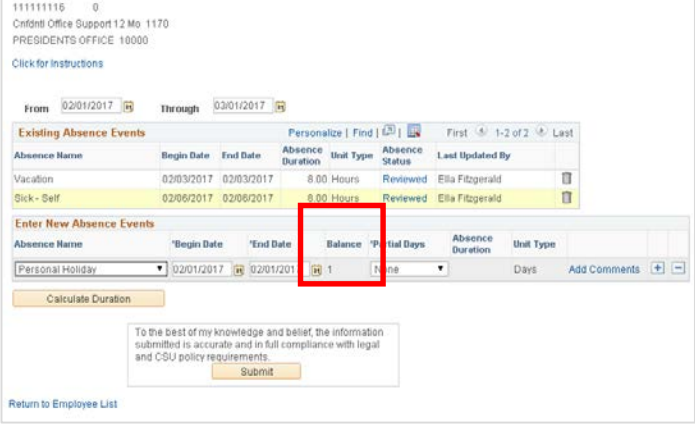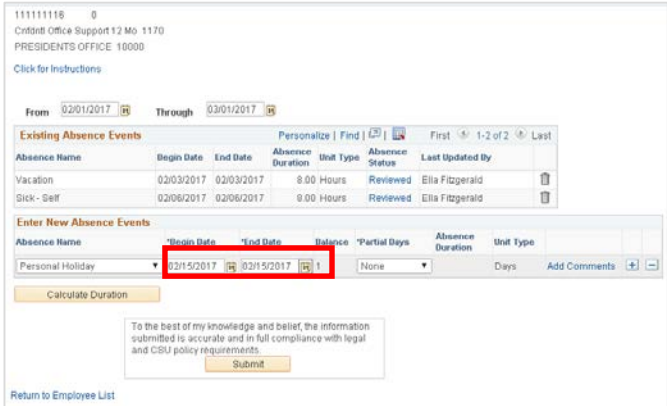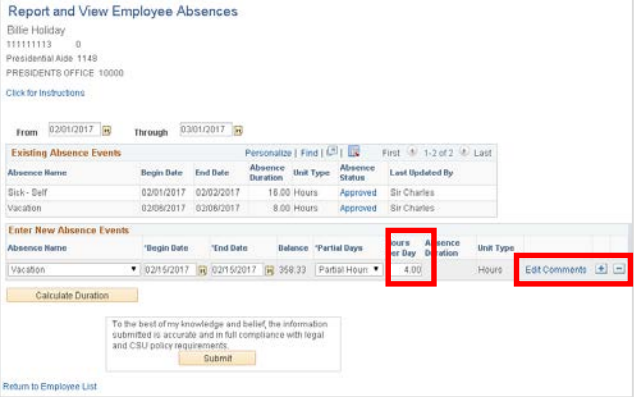
2.2. RECORDING AN ABSENCE FOR AN EMPLOYEE

STEP	ACTION	SCREENSHOT
1	From the MyCSUDH portal: Click on "Timekeeper Absence Entry" The "Report and View Employee Absences" page displays Change the "From" and "Through" dates to show absences from other pay periods	
2	To record an absence, select the Absence Name from the dropdown menu	

3	Confirm that the Balance covers the absence you are recording	
4	Enter the Begin Date and End Date for the absence event	
5	Select Partial Hours from the Partial Days dropdown menu (if applicable)	

6	Enter the Hours per Day (if using Partial Hours) • Click the "Add Comments" link (if applicable) PLEASE NOTE: THIS IS ONLY REQUIRED IF THE "ADD COMMENTS" LINK IS RED The comments link reads Edit Comments once comments are entered	
7	Enter the information as prompted PLEASE NOTE: BE BRIEF. DETAILS ARE NOT REQUIRED	
8	Select the "Save Comments" button	

9	Use the plus (+) icon to add rows for additional absences Note: You can also add consecutive absences (use the Calculate Duration button)	
10	Once all absences are entered, select the "Submit" button	
11	Select "OK" on the "Submit Confirmation" page	

12	The "Report and View Employee Absences" page displays	

The "Report and View Employee Absences" page displays

Submitted absence events are displayed with a *Reviewed* Absence Status

Use the navigation links at the bottom of the page to move from one employee to another.

Report and View Employee Absences
Stan Getz
111111116   0
Cnfdntl Office Support 12 Mo 1170
PRESIDENTS OFFICE 10000

Click for Instructions

From 02/01/2017   Through 03/01/2017

Existing Absence Events   Personalize | Find | 🖾 | 📰   First ◀ 1-2 of 2 ▶ Last

Absence Name	Begin Date	End Date	Absence Duration	Unit Type	Absence Status	Last Updated By	
Vacation	02/03/2017	02/03/2017	8.00	Hours	Reviewed	Ella Fitzgerald	🗑
Sick - Self	02/06/2017	02/06/2017	8.00	Hours	Reviewed	Ella Fitzgerald	🗑

Enter New Absence Events

Absence Name	*Begin Date	*End Date	Absence Duration	Unit Type		
No Leave Taken ▼	02/01/2017	03/01/2017			Add Comments	➕ ➖

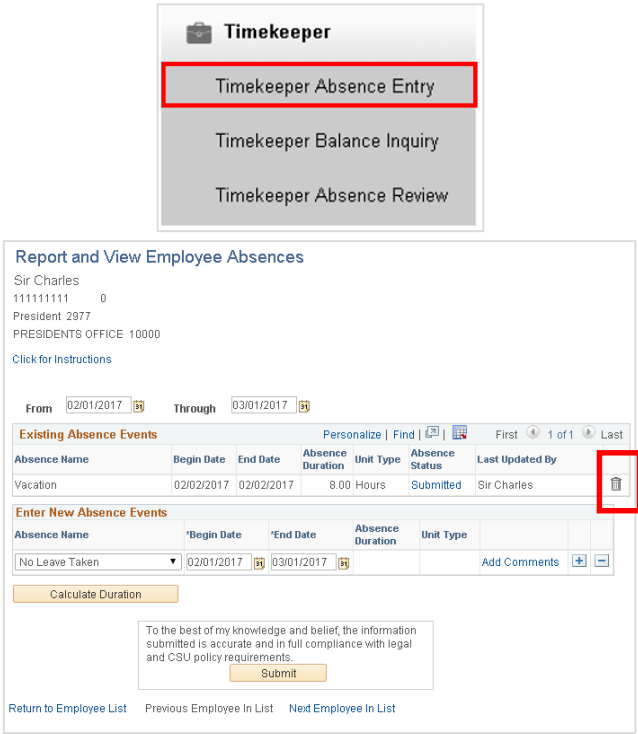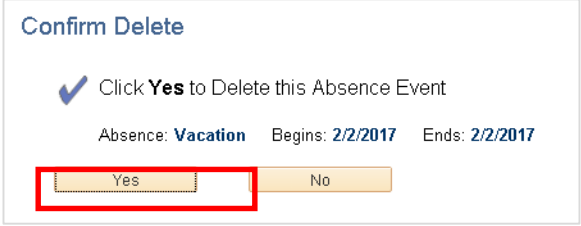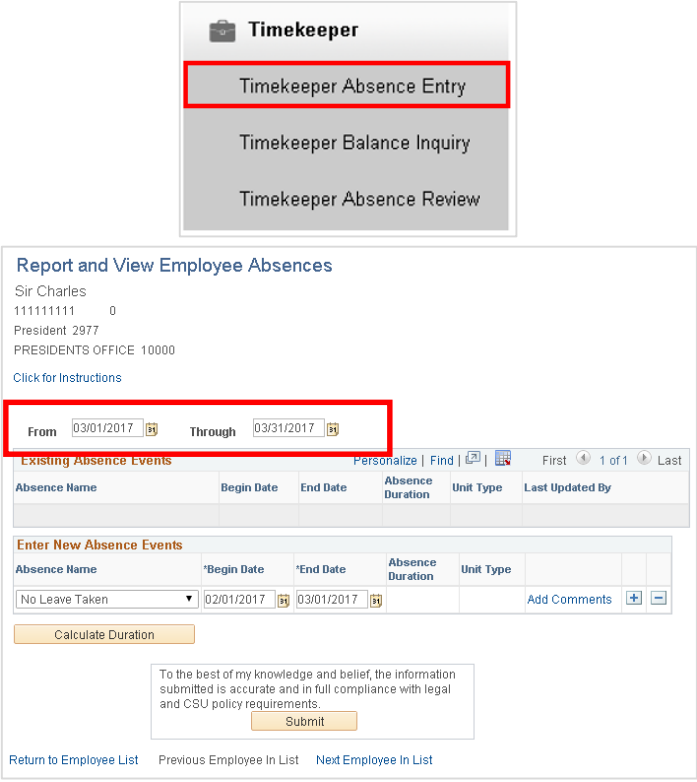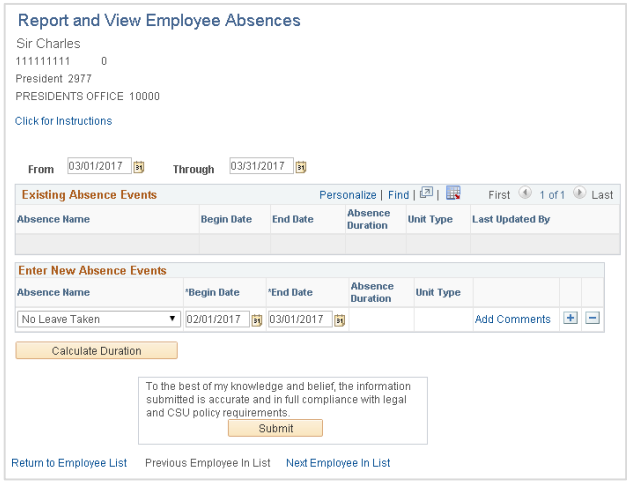Calculate Duration   Add a new

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

Submit

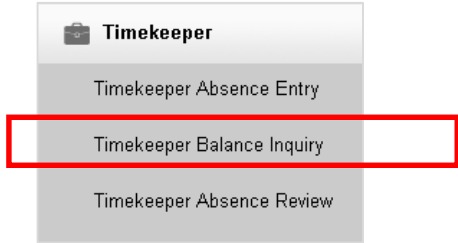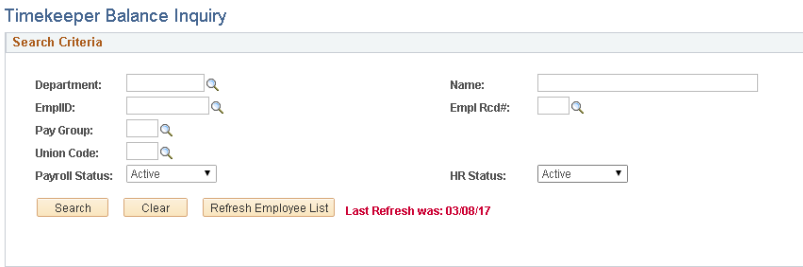Return to Employee List   Previous Employee In List   Next Employee In List

2.3. DELETE AN UNAPPROVED ABSENCE

Timekeepers can only delete absences with a Submitted status (entered by the employee) or a Reviewed status (entered by a Timekeeper). Approved absences can only be deleted by an approver or by Payroll.

STEP	ACTION	SCREENSHOT
1	From the MyCSUDH portal: Click on "Timekeeper Absence Entry" The "Report and View Employee Absences" page displays Select the "Trashcan" icon in the far right column to delete an absence	
2	Confirm that the absence being deleted is the correct one Click the "Yes" button, if appropriate, to continue deleting this absence event	

3	Confirm that the absence is no longer listed in the "Existing Absence Events" section The person who submitted the deleted absence event will receive an e-mail and should enter corrected information.	

2.4.   VIEW PRIOR ABSENCE TRANSACTIONS FOR AN EMPLOYEE

STEP	ACTION	SCREENSHOT
1	From the MyCSUDH portal: Click on "Timekeeper Absence Entry" The "Report and View Employee Absences" page displays Change the "From" and "Through" dates to view a different set of absence transactions	
2	The page refreshes displaying absence events for the requested time period Note: Repeat this process to display absence events for other time periods.	
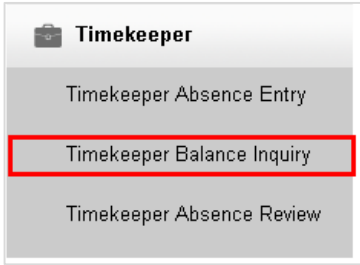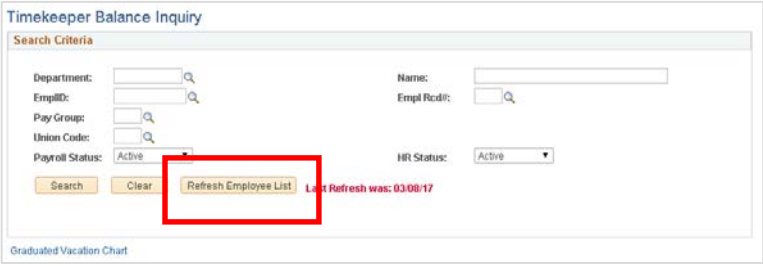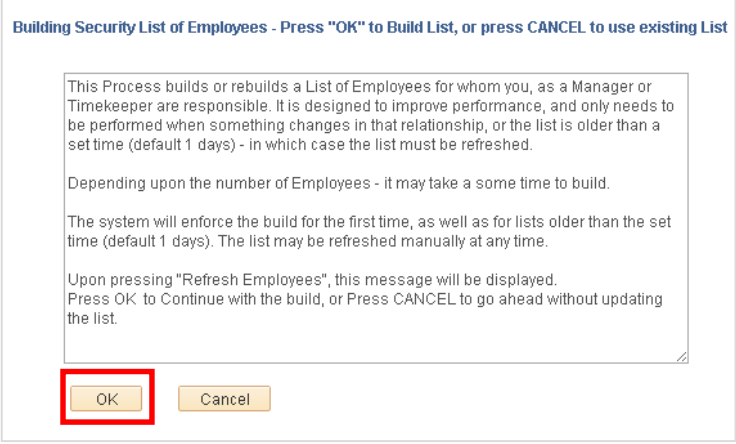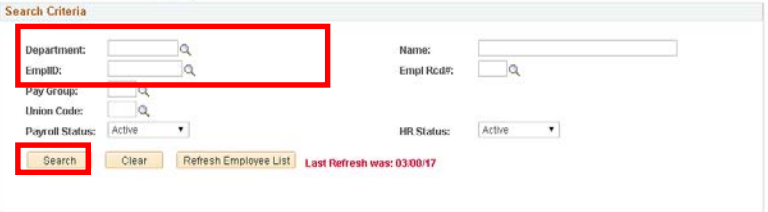
3. NAVIGATE TO "VIEW TIMEKEEPER BALANCE INQUIRY" PAGE

STEP	ACTION	SCREENSHOT
1	From the MyCSUDH portal: Click on "Timekeeper Balance Inquiry"	
2	The "Timekeeper Balance Inquiry" page displays	

3.1.   VIEW ABSENCE BALANCES FOR EMPLOYEES

STEP	ACTION	SCREENSHOT
1	From the MyCSUDH portal: Click on "Timekeeper Balance Inquiry" The "Timekeeper Balance Inquiry" page displays Click the "Refresh Employee List" button	

2	The "Building Security List of Employees" page displays Select the "OK" button in the "Building Security List of Employees" page to build the list and return to the "Timekeeper Balance Inquiry" page	Building Security List of Employees - Press "OK" to Build List, or press CANCEL to use existing List This Process builds or rebuilds a List of Employees for whom you, as a Manager or Timekeeper are responsible. It is designed to improve performance, and only needs to be performed when something changes in that relationship, or the list is older than a set time (default 1 days) - in which case the list must be refreshed. Depending upon the number of Employees - it may take a some time to build. The system will enforce the build for the first time, as well as for lists older than the set time (default 1 days). The list may be refreshed manually at any time. Upon pressing "Refresh Employees", this message will be displayed. Press OK to Continue with the build, or Press CANCEL to go ahead without updating the list. OK Cancel
3	On the "Timekeeper Balance Inquiry" page, enter a Department or EmplID to search for absence balances by department or employee Optionally, these fields can be left blank to view absence balances for all ==employees== ==Click the "Search" button to begin the search==	**Timekeeper Balance Inquiry** **Search Criteria** Department: ___ Name: ___ EmplID: ___ Empl Rcd#: ___ Pay Group: ___ Union Code: ___ Payroll Status: Active HR Status: Active Search Clear Refresh Employee List Last Refresh was: 03/00/17 Graduated Vacation Chart

4	Absence Balances are displayed: Sick Balance, Vacation Balance and Personal Holiday Available columns are displayed	
5	Use the tabs above the table to view All Compensatory Time and State Service for absence balances.	
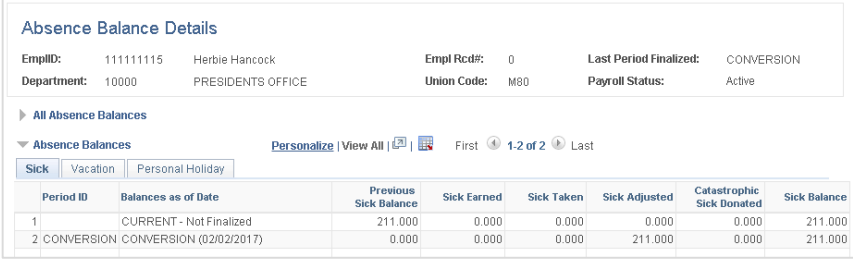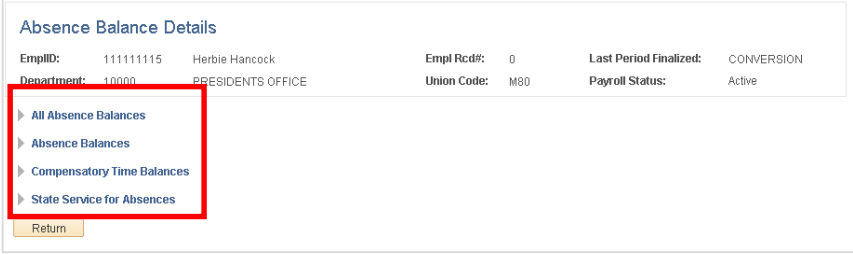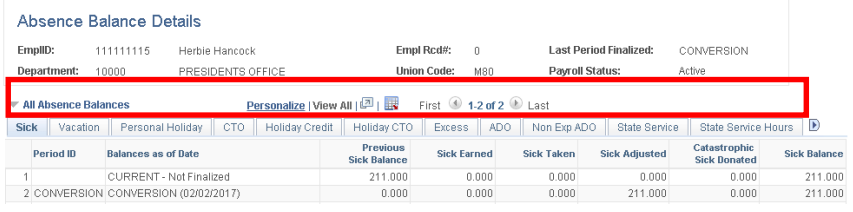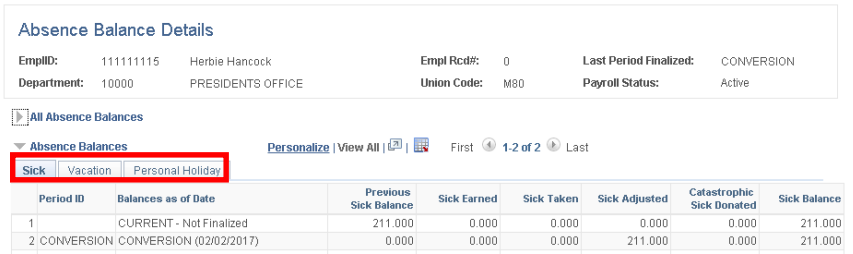
3.2.   VIEW ABSENCE BALANCE DETAILS FOR AN EMPLOYEE

STEP	ACTION	SCREENSHOT
1	From the MyCSUDH portal: Click on "Timekeeper Balance Inquiry". The "Timekeeper Balance Inquiry" page displays. Search for an employee's absence balances by department or EmplID	
2	To view more detailed information for any employee in the list, click the "Details" icon in the far right column (on any of the three tabs)	
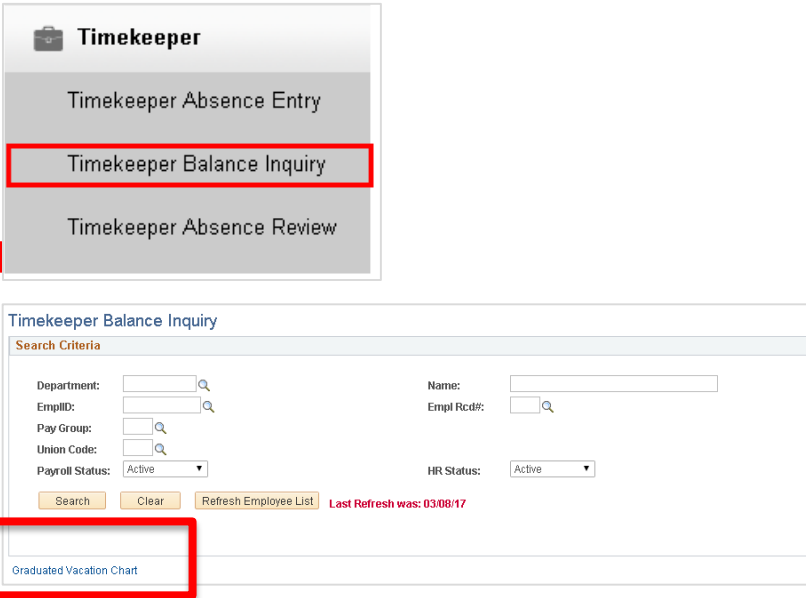
3	The "Absence Balance Details" page displays	
4	Note that there are 4 expandable sections on the page: All Absence Balances, Absence Balances, Compensatory Time Balances and State Service for Absences Select the right arrow beside the section name to expand or collapse that section	
5	Note: The "All Absence Balances" section contains all the tabs available in the other three sections	
6	The "Absence Balances" section contains the following tabs: Sick, Vacation and Personal Holiday	

7	The "Compensatory Time Balances" section contains the following tabs:
	
	• CTO,
	  Holiday Credit
	  Holiday CTO
	  Excess
	  ADO
	  Non Exp ADO	

8	The "State Service for Absences" section contains the following tabs:
	
	• State Service,
	  State Service Hours,
	  Service Hours Sick,
	  Service Hours Vacation
	  Service Hours FTE	

9	To return to the "Timekeeper Balance Inquiry" page, click the "Return button" at the bottom of the screen.	

3.3. VIEW THE GRADUATED VACATION CHART

STEP	ACTION	SCREENSHOT
1	From the MyCSUDH portal, click on "Timekeeper Balance Inquiry" In the "Timekeeper Balance Inquiry" page, select the "Graduated Vacation Chart" link at the bottom of the page.	
2	Based on employee state service, the Graduated Vacation Chart displays monthly vacation accrual rates, along with maximum vacation accrual allowances. Press Esc to return to the main balances page.	

3.4.   NAVIGATE TO VIEW "TIMEKEEPER ABSENCE REVIEW" PAGE

Timekeeper Absence Review is to be used by those who are designated to review but not to enter or approve absences for a group of employees. A Timekeeper may also use these pages to send an absence back to an employee for correction.

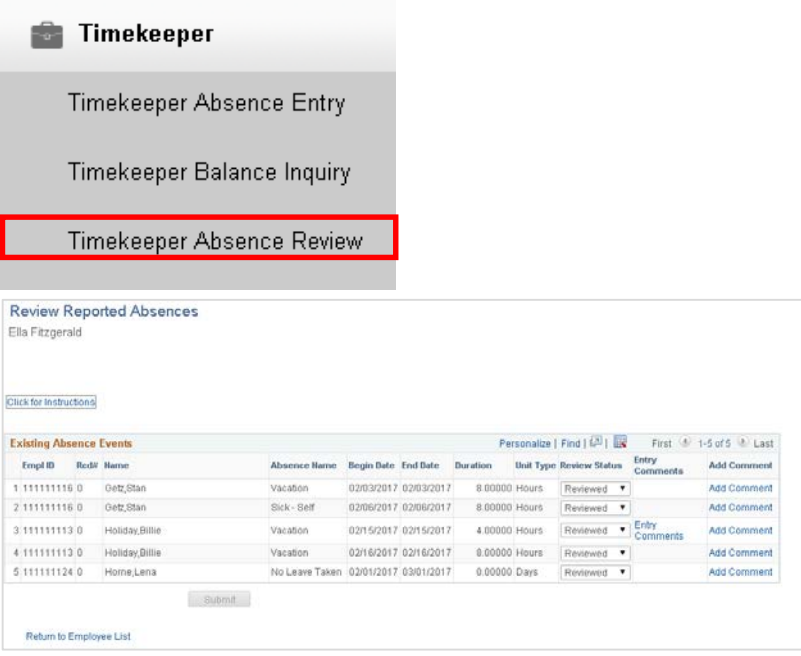| STEP	ACTION	SCREENSHOT
1	From MyCSUDH click on "Timekeeper Absence Review"	
2	The "Timekeeper Absence Review" page appears	
3 a	At the employee selection page: Check individual boxes in the 'Select' column for the employee(s) to review absences Select the "Continue" button OR	

STEP	ACTION	SCREENSHOT
3 b	• Click on the "Select All" button to check all employees listed • Select the "Continue" button	
4	The "Review Reported Absences" page displays. PLEASE NOTE: ONLY EMPLOYEES WHOSE ABSENCES ARE SUBMITTED AND UNAPPROVED WILL APPEAR IN THIS LIST • **Absences entered by a Timekeeper will appear with a Reviewed status** • **Absences entered by an Employee will appear with no status** To send an absence back to an employee for correction, see Section 3.5 To mark an absence entry as reviewed, see Section 3.6	

3.5.   SEND AN ABSENCE ENTRY BACK FOR CORRECTION

STEP	ACTION	SCREENSHOT
1	From MyCSUDH, click on "Timekeeper Absence Review" The "Review Reported Absences" page displays	
2	In the Review Status column, choose Needs Corr in the dropdown list	
3	Click the "Add Comment" link	

STEP	ACTION	SCREENSHOT
4	Enter a comment to communicate why the absence needs to be corrected PLEASE NOTE: BE BRIEF AND PROFESSIONAL WHEN ADDING COMMENTS. Click the "Save Comments" button An e-mail including your comment will be sent to the employee who entered the absence that needs correction.	**Approval Comments** Enter comments to be associated with the approval and click the Save Comments button to save them. To return without saving click the Return to Approvals Page link. Enter your comment here regarding Correction. Save Comments Return To Approvals Page
5	The "Review Reported Absences" displays Confirm that the comment link now reads "Edit Comment" and the Review Status indicates Needs Corr Click the "Submit" button to save your changes You can continue to review/correct the remaining absences before clicking the "Submit" button	**Review Reported Absences** Ella Fitzgerald Click for Instructions Absence Requests Personalize	Find			First 1-5 of 5 Last | Empl ID	Rcd#	Name	Absence Name	Begin Date	End Date	Duration	Unit Type	Review Status	Entry Comments	Add Comment
1 111111116 0	Getz,Stan	Vacation	02/03/2017	02/03/2017	8.00000	Hours	Reviewed		Add Comment
2 111111116 0	Getz,Stan	Sick - Self	02/06/2017	02/06/2017	8.00000	Hours	Needs Cor		Edit Comment
3 111111113 0	Holiday,Billie	Vacation	02/15/2017	02/15/2017	4.00000	Hours	Reviewed	Entry Comments	Add Comment
4 111111113 0	Holiday,Billie	Vacation	02/16/2017	02/16/2017	8.00000	Hours	Reviewed		Add Comment
5 111111124 0	Horne,Lena	No Leave Taken	02/01/2017	03/01/2017	0.00000	Days	Reviewed		Add Comment	 Submit Return to Employee List
6	Click the "OK" button on the "Approval Confirmation" page	**Approval Confirmation** ✔ Changes to Review Status were saved. OK

STEP	ACTION	SCREENSHOT
7	You successfully submitted any changes you have made on the "Review Reported Absences" page. PLEASE NOTE: THE "SUBMIT" BUTTON IS GRAYED OUT (UNAVAILABLE) AND THE "SUBMIT" BUTTON WILL BECOME AVAILABLE AGAIN WHEN YOU MAKE ADDITIONAL CHANGES.	

3.6.   MARK ABSENCE ENTRY AS REVIEWED

STEP	ACTION	SCREENSHOT
1	From MyCSUDH, click on "Timekeeper Absence Review" The "Review Reported Absences" page displays	

STEP	ACTION	SCREENSHOT
2	Choose Reviewed in the dropdown list in the Review Status column Click the "Submit" button You can continue to review/correct the remaining absences before clicking the "Submit" button	**Review Reported Absences** Ella Fitzgerald Click for Instructions Existing Absence Events — Personalize | Find | — First 1-5 of 5 Last 1 111111116 0 Getz,Stan Vacation 02/03/2017 02/03/2017 8.00000 Hours Reviewed ▼ Add Comment 2 111111116 0 Getz,Stan Sick - Self 02/06/2017 02/06/2017 8.00000 Hours Needs Cor ▼ Edit Comment 3 111111113 0 Holiday,Billie Vacation 02/15/2017 02/15/2017 4.00000 Hours Reviewed ▼ Entry Comments Add Comment 4 111111113 0 Holiday,Billie Vacation 02/16/2017 02/16/2017 8.00000 Hours Reviewed Add Comment 5 111111124 0 Horne,Lena No Leave Taken 02/01/2017 03/01/2017 0.00000 Days Reviewed Add Comment Submit — Needs Corr / Reviewed
3	Click the "OK" button on the "Approval Confirmation" page	**Approval Confirmation** ✔ Changes to Review Status were saved. OK
4	The "Review Reported Absences" page displays with the updated status information PLEASE NOTE: THE "SUBMIT" BUTTON IS GRAYED OUT (UNAVAILABLE) AND THE "SUBMIT" BUTTON WILL BECOME AVAILABLE AGAIN WHEN YOU MAKE ADDITIONAL CHANGES.	**Review Reported Absences** Ella Fitzgerald Click for Instructions Existing Absence Events — Personalize | Find | — First 1-5 of 5 Last 1 111111116 0 Getz,Stan Vacation 02/03/2017 02/03/2017 8.00000 Hours Reviewed ▼ Add Comment 2 111111116 0 Getz,Stan Sick - Self 02/06/2017 02/06/2017 8.00000 Hours Needs Cor ▼ Edit Comment 3 111111113 0 Holiday,Billie Vacation 02/15/2017 02/15/2017 4.00000 Hours Reviewed ▼ Entry Comments Add Comment 4 111111113 0 Holiday,Billie Vacation 02/16/2017 02/16/2017 8.00000 Hours Reviewed ▼ Add Comment 5 111111124 0 Horne,Lena No Leave Taken 02/01/2017 03/01/2017 0.00000 Days Reviewed ▼ Add Comment Submit

4. APPENDIX A

Below are Absence Take types that are available through Self-Service. Eligibility is based on an employee's collective bargaining unit.

Note: Not all takes in the list below will appear for every timekeeper. They depend upon CBID, etc.

ABSENCE TAKE	DESCRIPTION	USE PARTIAL HOURS OR SCHEDULED HOURS	CONSIDERATIONS
CTO AT EARN	CTO Premium Earn	Partial Hours Only	Compensatory time banked at a premium. Since this is time banked at a premium the employee must have worked over 40 hours in the workweek to enter time for this.
CTO AT TAKE	CTO Take	Partial Hours or Scheduled Hours	Usage of banked compensatory time.
DCK AT DOCK	Dock	Partial Hours or Scheduled Hours	Leave that has been taken after all accruals have been exhausted. Report this as appropriate as a take but note that a departmental dock form signed by the supervisor still must be turned in to Payroll.
FL ATFUNERAL	Bereavement/Funeral	Partial Hours or Scheduled Hours	Includes eligible immediate family members. Specify the family members in the Comments.
HCR AT EARN	Holiday Credit Earn	Partial Hours Only	Used when an employee works on a holiday and is due additional time off.
HCR AT USAGE	Holiday Credit Take	Partial Hours or Scheduled Hours	When using holiday credit that is on the system.
HCT AT EARN	Holiday CTO Earn	Partial Hours Only	Used when an employee works on a holiday and is due additional time off.
JD AT JURY	Jury Duty	Partial Hours or Scheduled Hours	Jury Duty when called to serve at a Superior, Municipal or District Court. Must turn into Payroll the official Jury Duty proof of service

ABSENCE TAKE	DESCRIPTION	USE PARTIAL HOURS OR SCHEDULED HOURS	CONSIDERATIONS
MPA AT MAT	Maternity/Paternity	Partial Hours or Scheduled Hours	30 day paid leave for the birth of the employee's child or the placement of a child with the employee through adoption or foster care.
NO LEAVE TAKEN	No Leave Taken	Scheduled Hours	No time taken for the pay period. If no other absence events have been reported for the month, this event MUST be submitted to indicate full time attendance.
PH AT PER HOL	Personal Holiday	Partial Hours or Scheduled Hours	One day off that is granted as of January 1st each calendar year. Usage is at the employee discretion with supervisor approval.
PL AT PARENT	Parental Leave	Partial Hours or Scheduled Hours	30 day paid leave for the birth of the employee's child or the placement of a child with the employee through adoption or foster care.
SCK AT DEATH	Sick - Bereavement	Partial Hours or Scheduled Hours	Upon request, bereavement/funeral leave may be supplemented with an employee's own sick leave credits. Specify the family member in the Comments.
SCK AT FAMILY	Sick - Family Care	Partial Hours or Scheduled Hours	Family care, meaning illness or injury in the immediate family up to 10 days of accrued sick leave may be used in one calendar year. Specify the family member in the Comments.
SCK AT SELF	Sick - Self	Partial Hours or Scheduled Hours	Sick leave chargeable to employee sick leave balance. Physician statement required when absent 5 or more consecutive days.
VAC AT VAC	Vacation	Partial Hours or Scheduled Hours	Vacation time chargeable to vacation balance when approved by the appropriate administrator.