1.0 Overview

In Fall 2011, the campus implemented the CSU Absence Management module which allows time entry previously submitted on the “Absence and Additional Hours Worked Report” to be entered online into the CMS system. The process will replace the Time and Attendance Report Form 672. All other documentation, such as jury duty certification, is still required. There are three specific roles in the process, other than the Payroll process:

- **Employees** enter, review, and submit their Absences in self service for the current, 3 prior periods and 2 future periods. 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.

- **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”. Employees automatically receive an email notification when an Absence is entered on their behalf.

- **Managers** 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.

- **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. Entries created by Payroll cannot be deleted by Employees, Timekeepers or Managers.

Time must be approved each month by 10am on the Final Attendance date (refer to the Payroll calendar here: [http://www.calstatela.edu/univ/payroll/calendar.php](http://www.calstatela.edu/univ/payroll/calendar.php)). Your time review due date will depend upon your manager’s requirements.

Manager Self Service and Global Payroll & Absence Management:

- Timekeeper Balance Inquiry page – view employee’s accrued balances
- Timekeeper Absence Review page – validate absences, update status to “Reviewed” or “Needs Correction”
- Timekeeper Absence Entry page – enter time on an employee’s behalf, status updates to “Reviewed”
- Calendar (Monthly, Weekly or Daily) page – view employee’s schedule
- Multi Report page – run absence reports
2.0  Timekeeper Absence Review Page

The “Timekeeper Absence Review Page” is utilized by Timekeepers to validate absences entered by employees. Once the employee entries have been checked, the Timekeeper updates the absence status to “Reviewed” for those entries that are ready to be approved by the Manager. Timekeepers may also update an entry to a status of “Needs Correction” and include a comment for the employee. This generates an email notification to the employee with the details of the Absence that needs correction.

Navigation: Manager Self Service > Time Management > Approve Time and Exceptions > Timekeeper Absence Review

The list of employees is based on the groupid’s you have access to and may be sorted by clicking on a column name (NOTE: you will not be able to ‘Review’ your own absences. Your manager will be the person to review and approve your time off). The “Current Period Absence” column shows the status of the employees time as “Appr” – all reported absences have been approved, “Sub” – absences have been submitted that still require approval (this includes “No Time Taken”), and “None” – no absences have been reported for this individual this period.

REMINDER: Everyone must either enter an absence or enter “No Time Taken” for the month. This means you cannot have anyone with a Current Period Absence status of “None”.

1. Click on the “Select” box next to the employee name to select one or multiple employees.
   A. Click on the “Select All” button at the bottom of the page to select all employees in the list.
   B. Click on the “Deselect All” button to clear all of the select boxes.

2. Click the “Continue” button to display the list of employee Absence entries awaiting review.

3. **Reviewed** - verify the absences and click the “Review Status” pull-down to update to “Reviewed” for those absences which are correct. Comments entered by the employee are available to view using the “Entry Comments” link, but employee comments cannot be modified by the Timekeeper. Once the status changes to “Reviewed” the employee cannot edit or delete this time, this must be done by the timekeeper or approver.
4. **Needs Correction** - if an absence needs to be corrected, select the pull-down for “Needs Corr”, click on the “Add Comment” link to include additional information for the employee to correct the Absence. Once you are done, click on the **Submit** button to submit all of the review status changes and generate the notifications for the entries that need correction.

5. Click on **OK** to confirm.

6. The notification is sent to the employee by email with any associated comments which were entered by the Timekeeper.

7. Once status has been changed to “Reviewed”, the entries are ready for manager approval (managers can also approve entries that have been submitted by employees and not reviewed by timekeepers). For employees who have not submitted either an absence or “No Time Taken”, you can either remind the employee or enter time on their behalf via the Timekeeper Absence Entry page.
3.0 Timekeeper Absence Entry Page

The Timekeeper Absence Entry Page is available for Timekeepers to enter absences or “No Time Taken” on an employee’s behalf when appropriate.

The “Timekeeper Absence Entry Page” includes all of the functionality/validation of the employee entry page plus the following additional functionality:

- Timekeeper entries are automatically updated to an Absence Status of “Reviewed” upon submission and cannot be adjusted or deleted by employees. This means you do not need to go to the Timekeeper Absence Review page for the employees for which you entered time.
- Timekeepers may delete Absence entries which are in a status of “Reviewed”, “Submitted” and “Needs Correction”.

Navigation: Manager Self Service > Time Management > Report Time > Timekeeper Absence Entry

1. The employees are based on the groupid’s you have access to and they may have other active records to which you do not have access (for example, they also work in another department.) Sort employees by clicking on a column name. Click on the “Select” box next to the employee name to select one or multiple employees or Select All for everyone.

NOTE: For employees who have more than one record, you need to make sure time is entered on the correct record. See Section 3.1 covering multiple positions and part-time faculty. Click on Continue to go to the Report and View Employee Absences page.
Page Overview:

2. Employee name, employee ID, record number, job title, job code, department name, and department ID. Click for Instructions link - displays the instructions for the “Report and View Absences” page.

3. “From” and “Through” dates - defaults to the current open Absence period. Changing the dates automatically updates the range of dates displayed in the "Existing Absence Events" grid.

4. **Existing Absence Events** grid - displays a list of the employee’s Absences based on the dates.
   - Absence Name: displays the Absence Name
   - Begin Date: begin date of the Absence
   - End Date: end date of the Absence
   - Absence Duration: duration of the Absence (in hours or days depending on the Absence)
   - Unit Type: displays the units which tracks the Absence (hours or days)
   - Absence Status: statuses displayed are:
     - Submitted – absence has been submitted by the employee
     - Reviewed – absence has been reviewed by a Timekeeper or Manager
     - Needs Correction – absence has been identified as needing correction
     - Approved – absence has been approved by a Manager
     - In Process – absence has been approved and is being processed by the Absence calculation
     - Finalized – absence has been approved and processed, no changes can be made.
   - Last Updated By: indicates the employee that entered the most recent update to the Absence

5. **Enter New Absence Events** grid – this is the area where you enter the absence events. The default date range is the current open Absence period that the Payroll Department is processing. Part time faculty and mid-month hires will see the effective date of their appointment.
6. Use the pull-down for “Absence Name” to display the eligible Absence takes or “No Time Taken”. Selection is based on the employee’s collective bargaining unit.

7. After selecting an absence, additional fields are displayed as applicable. For example, the selection of “Vacation” displays the vacation balance and the “Partial Days” field. *The system will not allow entries that result in a negative balance.*

Part-time Faculty 2358 – The selection of ‘Sick – Self’ or ‘Sick-Family Care’ automatically sets the Partial Days to ‘Partial Hours’. In the Hours per Day field, enter ‘1’ regardless of the number of days absent. This will notify the Payroll office who will then calculate the correct number of sick hours based on the FTE.

8. Select the “Begin” and “End” dates for the Absence. Click on the “Calculate Duration” and validate that the Absence is correct. If choosing “No Time Taken”, the dates will populate with the current absence period.


9. Non-exempt employees, for partial days select “Partial Hours” from the drop down and enter the appropriate hours in the “Hours per Day” field.
**IMPORTANT:** the system validates the time entered against the monthly schedule along with the campus holiday schedule. This means that if you enter a range of dates from Sunday through Saturday for vacation and the employee works the standard M-F 8am-5pm, the system will calculate the duration as 40 hours and not 56 hours. Also if you enter time off on a campus holiday, you will receive an error message. If the employee accrues ADO time, you will see the time on the Employee Balance Inquiry page. Alert Payroll as soon as an employee’s schedule changes.

10. Some absences, including Sick–Family Care, Sick–Bereavement and Bereavement/Funeral, require additional information. A message will appear and the Add Comments link will appear in red indicating information is required. If the comment is not entered, an error is generated and the transaction will not save.

   Enter the relationship. This information needs to be reviewed by the timekeeper, manager and the payroll office.

11. To enter another absence, click on [+] to add a row and continue as instructed above until all absences are entered. To delete a [-] row entered in error, click on [-] before you submit.

12. Once you are finished entering all absences, review the information carefully and click on [Submit].

   Click on [OK], you will return to the Report and View Absences page.
13. The Existing Absence Events grid is updated. Change the From and Through dates to view other absence periods. Entries made by an employee reporting their own Absence time show an “Absence Status” of “Submitted”. Absences that are in a status of “Submitted” or “Needs Correction” can be deleted by the employee or timekeeper using , you will be asked to confirm:

![Confirm Delete]

Confirm, you will return to the Report and View Absences page

**NOTE:** if an absence needs to be entered after “No Time Taken” has been submitted, delete the row or else you will get the following error when you try to submit an absence:

![Submit Confirmation]

The following table shows who (E=Employee, T=Timekeeper, M=Manager, P=Payroll) can make changes to your time based on the Absence Status:

<table>
<thead>
<tr>
<th>Absence Status</th>
<th>Description</th>
<th>Adjust Time</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted</td>
<td>Absence submitted by employee</td>
<td>E/T/M/P</td>
<td></td>
</tr>
<tr>
<td>Reviewed</td>
<td>Absence reviewed by timekeeper</td>
<td>T/M/P</td>
<td>Contact your timekeeper or manager for corrections</td>
</tr>
<tr>
<td>Needs Correction</td>
<td>Absence has been identified by a timekeeper/manager as needing correction</td>
<td>E/T/M/P</td>
<td></td>
</tr>
<tr>
<td>Approved</td>
<td>Absence has been approved by a manager</td>
<td>M/P</td>
<td>Contact your manager for corrections</td>
</tr>
<tr>
<td>In Process</td>
<td>Approved absence is being processed by payroll</td>
<td>P</td>
<td></td>
</tr>
<tr>
<td>Finalized</td>
<td>Absence is finalized, no change can be made</td>
<td>P</td>
<td>Enter correction</td>
</tr>
</tbody>
</table>
3.1 Full-Time and Part-Time Faculty Multiple Positions

Employees who have multiple positions:

1. Full-time faculty (2360) member teaching for Extra Quarter Pay (2368) assignment in the summer (i.e., beyond a regular full-time academic year appointment) do not earn additional sick leave nor may they use accrued sick leave during the period when they are teaching for extra pay.
   - If you report sick leave in the Extra Quarter assignment, you will be docked (at the end of the quarter).

2. Chair with two positions – you will see two positions on Absence Management

   AY Chair (2482) at ½ time base and full-time faculty (2360) at ½ time base
   - If you are out sick for the day, you need to report absences on both positions.
     - Select record 0 to report absence for the Instructional Faculty AY position.
     - Select record 3 to report absence for the Department Chair AY position.

---

**Reporting absence on record 0 (Instructional Faculty AY):**

---

**Reporting absence on record 3 (Dept Chair AY):**
3. Part-time faculty (2358) with multiple positions: If you have two teaching Part-time faculty (Lecturer AY) positions on a FWS contract or quarter appointments.
   - Report absences on both positions if you are out sick for the day.
   - Report ‘dock’ if no sick leave balance available. The dock will be deducted from your last check.

Record 0 is a Y3 contract at 12 units:

Record 2 is a Y3 contract at @ 4 units:
4. Full-time Staff with a part-time faculty (2358) appointment.

- You have reported out sick for the day in the 2358 position. You will see no sick leave earned in the Lecturer AY record because you already earned full accrual rate in the full-time staff position.

- In this case, you can select to be dock in the Lecturer AY position (record #0) or use sick hours from the staff position (record #2).
- The ‘dock’ will be deducted from your Lecturer AY last check.

**Option 1: Report ‘dock’ on record 0:**

**Option 2: Use sick hours from staff position (record 2):**

- In the ‘Partial Day’ column, select *Partial Hours* and enter the actual hours used in the Hours per Day column. (i.e., teach 4 units in the 2358 – 8 x 4/15 = 2.13 hours/day)

### 3.2 Docks

Dock (employee has had a non-compensable absence) must be reported to payroll and entered in Absence Management and Time and Labor as soon as they occur for the entire month. Payroll reports docks to the State Controller’s Office by the “master cut off” date in order to capture all docks in the employee’s upcoming paycheck. Please refer to the payroll calendar for the cut-off dates.
Navigate to: Manager Self Service > Time Management > Report Time > Timesheet

- Pull up Employee(s) by Empl ID or group ID

- Select “Dock” under the Time Reporting Code. Enter dock hours and click submit.
Ask payroll to run Time Administration and have the approver approve the hours immediately.

Entering docks in Absence Management

- Navigate to: Manager Self Service > Time Management > Report Time > Timekeeper Absence Entry
- Under "Enter New Absence Events", use the drop down arrow to select Dock, and then enter the Begin Date and End Date.
- Leave partial days as None to dock based on the employee’s scheduled hours or select partial hours to report dock with partial hours for that day

Approvers navigate to Approve Reported Absences and approve the dock(s). Docks need to be entered in both systems.
4.0 Timesheet page

The timesheet is used to enter time for students, positive attendance, overtime, shift differential and docks (REMEMBER: you only need to enter docks on the timesheet before Master Cutoff, refer to the Payroll calendar). The difference between the timesheet and absence entry page is absence entry is for paid time off while the timesheet is to enter payable time and docks.

Navigation: Manager Self Service > Time Management > Report Time > Timesheet

1. Enter your groupid and click on Get Employees. Select the employee that you are entering time for.

2. Enter the time and select the appropriate code from the Time Reporting Code dropdown (codes will vary depending on the employee’s classification and union). Below is a list of Time Reporting Codes:

<table>
<thead>
<tr>
<th>TRC pertains to Bargaining Units 2, 5, 7 and 9 (CSUEU), 6 (Trades):</th>
<th>TRC pertains to Bargaining Units 8:</th>
</tr>
</thead>
<tbody>
<tr>
<td>OTPR = Overtime worked for pay @ 1.5</td>
<td>HG5 = Holiday RDO Pay @1.0</td>
</tr>
<tr>
<td>OTST = Time worked for pay (@ straight time)</td>
<td>HG6 = Holiday Worked Pay @ 1.5</td>
</tr>
<tr>
<td>SHSWG = Evening Shift Differential</td>
<td>OF5 = Premium Straight Pay @ 1.0</td>
</tr>
<tr>
<td>SHGRV = Night Shift Differential</td>
<td>OF6 = Premium Overtime Pay @ 1.5</td>
</tr>
<tr>
<td>DOCK = Time Docked</td>
<td>SHE08 = Evening Shift Differential</td>
</tr>
<tr>
<td>SHE08 = Night Shift Differential</td>
<td>SHN08 = Night Shift Differential</td>
</tr>
<tr>
<td>DOCK = Time Docked</td>
<td></td>
</tr>
</tbody>
</table>

Click on + to add additional rows and - to delete rows. When you are done, click on Submit.
3. Click on OK to confirm.

<table>
<thead>
<tr>
<th>Date</th>
<th>Status</th>
<th>Total Time Reporting Code</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/01/2011</td>
<td>Submitted</td>
<td>8.00 OTRP</td>
<td></td>
</tr>
</tbody>
</table>

4. Once time is entered, you may enter comments by selecting the Comments icon for the associated time. Time entered on the timesheet will run through the ‘Time Administration’ process which runs nightly. Once the process is complete, time entered updates to the ‘Approve Payable Time’ page for the approver to approve.
5.0 Timekeeper Balance Inquiry

The Timekeeper Balance Inquiry page allows you to view accrued balances along with a detailed page displaying historic information from prior finalized periods, and information for the current period. Employees will also have access to this page in their self service account.

The leave types accessible are: State Service (for absence), Sick, Vacation, Catastrophic Donation, Personal Holiday, Compensatory Time (CTO), Additional Day Off (ADO), Holiday Credit, Holiday CTO, Excess (+/-) and Furlough.

**Navigation:** Manager Self Service > Time Management > Timekeeper Balance Inquiry

1. Select Timekeeper Balance Inquiry

2. Click on **Search**. All employees you have access to will display. If you have access to multiple departments, you can limit your search by entering the Department (deptid).

3. If an employee has active multiple job records, multiple rows will display. Terminated records will not show balances. There are three tabs:
   - **Absence Balances** – accrued time, includes sick, vacation and personal holiday
   - **Compensatory Time** – earned time, includes CTO, ADO, etc
   - **State Service for Absence** – state service (used in calculating leave accruals) and carryover hours
4. Click the link for each employee, the Absence Balance Details page shows the historical balance since conversion (October 2011) for each type of balance. You can also click on the arrow for All Absence Balances to view all the tabs from the Compensatory Time Balances and State Service for Absences pages or click on the arrow for Compensatory Time Balances and State Service for Absences to view those pages. Click on Return to go back to the Inquiry page.
6.0 Timekeeper Absence Reports

There are 4 reports available to run to validate absence activity:

- **Absence Activity** – Report is run by employee or department. Snapshot of Absence activity by employee. Includes Absences takes, balances, and adjustments.
- **No Time Reported** – Report is run by department each Absence period. Identifies Absence Management eligible employees who have not reported any absences.
- **Reported Absences** – Report is run by employee or department for a specified period. Summary of reported absences by employee.
- **Reported Absences Not Approved** – Report is run by department for a specified period. Summary of reported absences which have not been approved.

**Navigation:** Global Payroll & Absence Mgmt > CSU Absence Mgmt > CSU – AM Inquiry > Multi Report

1. Click on **Multi Report**.

2. Click on **Search** to go to the Multi Reports page. **NOTE:** If this is the first time you run this report, you need to create a Run Control name. Click on “Add a New Value” the first time.

Create a run control name, no spaces but you can use ___ and click on **Add**.
1. **Department**: if you leave this field blank, your reports will include all departments you have access to.
   
   **Period ID**: you can enter a specific timeframe (like above) or you can just enter from when you want to run the report and leave Ending Period ID blank.

2. Click on the hyperlink for the report name, the results will display below.

**Absence Activity** - Snapshot of Absence activity by employee, includes Absences taken, balances, and adjustments.

The reports will display the specific information and have two tabs, Absence Info and Employee Info. You can click on the icon to expand all columns on both tabs.

The Absence Activity, Reported Absences and Reported Absences Not Approved reports also have a filter to pull specific absence types.
No Time Reported – Identifies Absence Management eligible employees who have not reported any absences.

Reported Absences Report - Summary of reported absences by employee

Reported Absences Not Approved - Summary of absences that have not been approved (currently there are no absences pending so the screenshot below is blank)
6.1 Download Reports to Excel

Click on the download button, the following should pop-up:

You can choose to open the file or save to your computer, click on OK.

You should get the following message, click on Yes. Your report should open. You can also customize your report to run with specific columns only or in a specific sort order, see the next section ‘Customizing Reports’.

If you have problems downloading to excel, the most common issue are your computer settings here:

You may need to contact your ITC for assistance.
6.2 Customizing Reports

You can customize your reports to only show the columns you want to include or sort in a specific order. Open all your columns by clicking on **[Open]**. Click on the **Customize** link all the way to the right.

Before you begin to customize, expand all columns and look at what the report provides. Determine which columns you do not need. Some of the columns you may wish to exclude are: AM Pay Group, Partial Hours, All Days, End Day Hours, Void, and Source.

**Hide Columns** - Highlight the column you do not want and click on **Hidden**. You can always uncheck the box to return the column to your report.

**Reorder Column** – highlight the column and click on the arrows to reorder your report columns.

**Sort Order** – highlight the column and click on **[Move]** to move over to the next box. The order in this box will determine the sort order.

Once you are finished, click on **OK**. Your report will remain customized until you make a change.