Absence Management for Managers

Vacation

User’s Guide

The College of Lake County

4/23/2020
Absence Management for Managers – General Information

PeopleSoft Absence Management is to be used by employees to request time off from work. Employees can request full days, partial days, or a combination of each. Absence requests must be approved by the employee’s designated Manager (approver). It would be a good practice to check these email requests on a daily basis. (If you would like to create a rule in Outlook for absence request emails, please refer to Appendix A for procedures). Managers may approve, deny or push back absence requests. **It is imperative employees check their leave balances before completing an absence request. You will be able to see the employee’s leave balance (if applicable) when reviewing their request.**

Smartphone/Tablet Usage

You can utilize your Smartphone or Tablet to perform the Absence Management functions that are covered in this User’s Guide.

Prior Pay Period Absences

Past absences (prior pay periods) can be entered, but should be an exception. Absence requests are generally to be entered on a timely basis, prior to the absence. Non-exempt employees’ pay can be affected if absences are not entered in a timely manner.

Duplicate Date Entry

Absences can be submitted for the same day utilizing different leave categories. For example an employee could have two (2) hours health leave and six (6) hours vacation leave for the same day. However, when requesting leave, the amount of time requested should not exceed the scheduled hours for the day. Duplicate date entry is NOT applicable for Adjunct Non-Teaching or Professor Emeritus Non-Teaching. (See tables on pages 3-7 for absence request data entry rules for specific job categories.)

Vacation Tips

The best practice is to be proactive in vacation planning for all staff. There should be a year-long plan for an employee to utilize vacation needed to take, but also addressing any blackout periods (i.e., start of a semester, graduation, etc.).

**Note:** Employees have been advised to await Manager approval of a request prior to making any vacation or other plans for the time off period.

Work Schedule Changes

If an absence request has been entered and the employee’s work schedule changes during the affected pay period, the request will be processed at the rate of hours based on the new work schedule. If a new schedule has the employee scheduled off on a day previously requested off, the
request will not process and no hours will be deducted from leave balances. Employees must check with their Manager if the work schedule needs to be updated.

**Employees Working College Holidays (Special Situation)**

This typically involves the Police Department. Employees scheduled to work on a College holiday who wish to request the day off (with Manager approval) must have their Manager email the Benefits and Leave Coordinator to enter the absence on the employee’s behalf.

**Note:** Additional Procedures are in place for FMLA, Military Leave and Jury Duty. Please refer to Board Policy, Union Contracts (if applicable), FAQ’s or contact the Benefits and Leave Coordinator.
Tables of Data Entry Rules

The tables on the next pages address data entry rules for specific job categories

<table>
<thead>
<tr>
<th>Job Category</th>
<th>Time off Categories</th>
<th>Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff (Non-Union)</td>
<td>Regular Leave:</td>
<td>A required field for <strong>Health, Vacation and Personal</strong> requests is: “FMLA: Pending or Approved or No.” You will answer either “Yes” or “No.” If you are uncertain, please contact the Benefits and Leave Coordinator. <strong>Health</strong> – Another required field for a Health request is: “Is it for Family Bereavement?” College Policy 939 allows for up to 5 days of Bereavement for an immediate family member utilizing Health. You will answer either “Yes” or “No.” An employee who misses 5 workdays may be required to provide timely medical documentation while on health leave and upon returning to work. (Excluding time for bereavement) <strong>Vacation</strong> – Cannot be utilized during initial probationary period. If requested during initial probationary period, it will go to Unpaid status. <strong>Personal</strong> – Manager approval required prior to the requested day. <strong>Jury Duty</strong> – Employee is to submit a copy of court summons to the Benefits and Leave Coordinator in Human Resources. <strong>Military Leave</strong> – Please refer to the Board Policy for terms of usage.</td>
</tr>
<tr>
<td></td>
<td>• Health</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Vacation</td>
<td></td>
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<tr>
<td></td>
<td>• Personal</td>
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<td></td>
<td>Other Leave:</td>
<td></td>
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<tr>
<td></td>
<td>• Jury Duty</td>
<td></td>
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<tr>
<td></td>
<td>• Military</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Reminder:</strong> Timely Requests Required</td>
<td></td>
</tr>
<tr>
<td>Job Category</td>
<td>Time off Categories</td>
<td>Rules</td>
</tr>
<tr>
<td>------------------------</td>
<td>----------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Facilities Union</td>
<td>Regular Leave:</td>
<td>A required field for <strong>Health, Vacation and Personal</strong> requests is: “FMLA: Pending or Approved or No.” You will answer either “Yes” or “No.” If you are uncertain, please contact the Benefits and Leave Coordinator.</td>
</tr>
<tr>
<td></td>
<td>• Health</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Vacation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Personal</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Other Leave:</td>
<td><strong>Health</strong> – Another required field for a Health request is: “Is it for Family Bereavement?” You will answer either “Yes” or “No.” An employee who misses 4 or more consecutive days of work may be required to submit a doctor’s note for the absence to be verified. (Excluding time for bereavement)</td>
</tr>
<tr>
<td></td>
<td>• Jury Duty</td>
<td></td>
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<tr>
<td></td>
<td>• Professional Meeting</td>
<td></td>
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<tr>
<td></td>
<td>• Military Leave</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Release</td>
<td></td>
</tr>
<tr>
<td><strong>Reminder:</strong></td>
<td><strong>Timely Requests Required</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Vacation** – Cannot be utilized until after completing 3 months of employment. If requested during the first 3 months, it will go to Unpaid status.

**Personal** – Cannot be utilized during initial probationary period. If requested during initial probationary period, it will go to Unpaid status.

**Jury Duty** - Employee is to submit a copy of court summons to the Benefits and Leave Coordinator in Human Resources.

**Professional Meeting** – To be utilized to attend special programs, workshops or conferences with prior approval of supervisor.

**Military Leave** – Please refer to your Contract for terms of usage.

**Release** – Up to 3 days per calendar year shall be granted to conduct Union business (The Union shall give advance notice and certify).
<table>
<thead>
<tr>
<th>Job Category</th>
<th>Time off Categories</th>
<th>Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Police Union</td>
<td>Regular Leave:</td>
<td><strong>A required field for Health, Vacation and Personal requests is: “FMLA: Pending or Approved or No.” You will answer either “Yes” or “No.” If you are uncertain, please contact the Benefits and Leave Coordinator.</strong></td>
</tr>
<tr>
<td></td>
<td>• Health</td>
<td><strong>Health</strong> – An employee who misses 3 or more consecutive days of work is required to submit a doctor’s note for the absence to be verified.</td>
</tr>
<tr>
<td></td>
<td>• Vacation</td>
<td><strong>Vacation</strong> - Cannot be utilized until after completing 6 months of employment. If requested during the first 6 months, it will go to Unpaid status.</td>
</tr>
<tr>
<td></td>
<td>• Personal</td>
<td><strong>Personal</strong> – Manager approval required prior to the requested day.</td>
</tr>
<tr>
<td></td>
<td>Other Leave:</td>
<td><strong>Jury Duty</strong> - Employee is to submit a copy of court summons to the Benefits and Leave Coordinator in Human Resources.</td>
</tr>
<tr>
<td></td>
<td>• Jury Duty</td>
<td><strong>Military Leave</strong> – Employee must present written evidence of induction, call to training, active duty for reserve or national guard status to the Chief as soon as practical.</td>
</tr>
<tr>
<td></td>
<td>• Military Leave</td>
<td><strong>Bereavement</strong> – Employee is allowed up to 5 consecutive days when a death occurs in an employee’s immediate family. Immediate family is defined in the contract. The employee should provide the relationship in the comment field of the absence request.</td>
</tr>
<tr>
<td></td>
<td>• Bereavement</td>
<td><strong>Reminder: Timely Requests Required</strong></td>
</tr>
<tr>
<td>Job Category</td>
<td>Time off Categories</td>
<td>Rules</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>---------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Full-Time Faculty &amp; Term Limited Faculty</td>
<td>Regular Leave:</td>
<td><strong>Health</strong> – Utilized for own illness or where there is a serious illness or death in the immediate family.</td>
</tr>
<tr>
<td>(Load Hour)</td>
<td>• Health</td>
<td>Time requested is to be in four (4) or eight (8) hour increments, per the faculty contract.</td>
</tr>
<tr>
<td></td>
<td>• Personal</td>
<td>Two required fields for <strong>Health</strong> are:</td>
</tr>
<tr>
<td></td>
<td>Other Leave:</td>
<td>1. “FMLA: Pending or Approved or No.” You will answer either “Yes” or “No.” If you are uncertain, please contact the Benefits and Leave Coordinator.</td>
</tr>
<tr>
<td></td>
<td>• Jury Duty</td>
<td>2. “Is it for Family Bereavement?” You will answer either “Yes” or “No.”</td>
</tr>
</tbody>
</table>

**Reminder:** Timely Requests Required

**Personal** - Time requested is to be in four (4) or eight (8) hour increments, per the Faculty Contract.

Requests for the following dates are not allowed per the faculty contract (Managers have been instructed not to approve):

- Orientation week
- First week of class or final exam week of any semester
- Commencement (needs approval of VP)
- Faculty work day before or after any holiday or extended school break.

**Jury Duty** - Employee is to submit a copy of court summons to the Benefits and Leave Coordinator in Human Resources.
<table>
<thead>
<tr>
<th>Job Category</th>
<th>Time off Categories</th>
<th>Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Full-Time Faculty &amp; Term Limited Faculty</strong>&lt;br&gt;(Clock Hour – Librarians/Counselors)</td>
<td>Regular Leave:</td>
<td><strong>Health</strong> – Utilized for own illness or where there is a serious illness or death in the immediate family.</td>
</tr>
<tr>
<td></td>
<td>• Health</td>
<td>Two required fields for <strong>Health</strong> are:</td>
</tr>
<tr>
<td></td>
<td>• Personal</td>
<td>1. “FMLA: Pending or Approved or No.” You will answer either “Yes” or “No.” If you are uncertain, please contact the Benefits and Leave Coordinator.</td>
</tr>
<tr>
<td></td>
<td>Other Leave:</td>
<td>2. “Is it for Family Bereavement?” You will answer either “Yes” or “No.”</td>
</tr>
<tr>
<td></td>
<td>• Jury Duty</td>
<td><strong>Personal</strong> - Requests for the following dates are not allowed per the faculty contract (Managers have been instructed not to approve):</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Orientation week</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• First week of class or final exam week of any semester</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Commencement (needs approval of VP)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Faculty work day before or after any holiday or extended school break.</td>
</tr>
<tr>
<td></td>
<td><strong>Reminder:</strong></td>
<td><strong>Jury Duty</strong> - Employee is to submit a copy of court summons to the Benefits and Leave Coordinator in Human Resources.</td>
</tr>
<tr>
<td>Adjunct Faculty</td>
<td>Regular Leave:</td>
<td><strong>Personal</strong> – Can be taken in ½ or full day increments</td>
</tr>
<tr>
<td>(Load Hour and Clock Hour)</td>
<td>• Personal</td>
<td>• May be entitled to two (2) days per Fall and Spring semester and one (1) day in the Summer semester. Please refer to your contract.</td>
</tr>
<tr>
<td></td>
<td>Other Leave:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Bereavement</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• College Business</td>
<td></td>
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<tr>
<td></td>
<td>• Jury Duty</td>
<td></td>
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<tr>
<td></td>
<td>• Professional Meeting</td>
<td></td>
</tr>
<tr>
<td>Professor Emeritus</td>
<td>Regular Leave:</td>
<td>**Allotted 3 days per academic year, but may not take more than 2 days in any semester. Please refer to your contract.</td>
</tr>
<tr>
<td>(Load Hour and Clock Hour)</td>
<td>• Personal</td>
<td></td>
</tr>
</tbody>
</table>
Accessing Absence Management

1. **Launch a browser** (either Mozilla Firefox or Google Chrome).
2. Click **Login** on the CLC Portal.

**Note:** This Login screen content could change, but the **myCLC Login** will be on the page.
3. Enter **Username**.
4. Enter **Password**.
5. Click **Login**.

6. Click the **Employee Self Service** link.
7. Enter **User ID**.
8. Enter **Password**.
9. Hit **Enter** or click **Sign In**. The **Manager Self Service** homepage will appear.

The below **Manager Self Service** homepage screen appears.
Approving Pending Absences

You can use the PeopleSoft Manager Self Service Homepage or Manager Self Service navigation to view absence requests that need approval. This area allows Managers to view all of the absence requests submitted for the employees who report to them and for those employees who may be delegated to them.

There are two options for approving absence requests:

- Approvals tile
- Email link

Note: It would be helpful to have a conversation/communication with the employee if denying or pushing back a request rather than only utilizing the system to communicate.

Note: It is important to verify the employee has enough hours in their specific balance to utilize. Staff accrue health and vacation monthly, so a low current balance is not always an indicator that they will not have enough time available for a future absence.

Approvals Tile

The Approvals tile is the path to navigate to view all absence requests awaiting your approval.

1. Click on the Approvals tile.

2. The Pending Approvals screen below will display. Click on Absence Request.
You can view your employees’ absence requests or requests to cancel an absence.

If you have accepted a delegation request to approve absences for someone else, you will see their employees’ requests here as well. They will be denoted by the “Delegated by” language.

The default display upon clicking the tile is to show All pending approvals. You will need to click on a specific type of approval in order to have a check box appear to the left of an employee’s name.

a. **Absence Request** to view only absence requests.
b. **Cancel Absence** to view only requests to cancel an absence.

**Note:** You can click on the drop down arrow next to **View By** to view by Date Routed, From, Requestor or Type.

**Note:** You can also filter further on Type, Requestor, From and to Date Period by clicking on the **Funnel** icon. Click the **Reset** button after selecting the filter.

3. Click anywhere inside the box containing a specific employee’s absence, if you want to see more information on that absence.

   a. The below screen will then appear. Note the current balance in the absence category requested is indicated and also the request history of the specific request. You can click on **Approve**, **Deny** or **Pushback** for this request while in this screen, in the upper right corner.
4. To narrow down approvals by category, click on either Absence Request or Cancel Absence. If you chose Absence Request, in this example, you will then only bring up the one absence request that is pending action.

5. The Pending Approvals screen appears once you choose a specific type of item awaiting approval. You will notice it includes a check box to the left of their name. Click the checkbox and you can then Approve, Deny or Pushback the request.

   **Note:** If there was more than one absence request here, you could mass approve the requests by checking all the checkboxes and then clicking the appropriate action.

   **Note:** If you choose to Pushback an absence request, you should enter a comment at the Approver Comments prompt. A comment is required if you choose Deny.
6. Once you select the appropriate action, the **Mass Approve** window appears. You can make any **Approver Comments** here and then click **Submit**. You will then notice a green bar at the top of the screen that appears briefly and indicates “**You have [Approved, Denied or Pushed Back] one transaction(s).**”

**Note:** After you have acted upon an absence request, the employee will receive a notification via email.
Email Link
You can approve an employee’s absence request or absence cancelation request via the link you receive in your email.

1. You will receive an email as indicated below. You can take action on the absence request through the link in the email. It will direct you to the approval page. Once on the approval page, you can view the absence request and either approve, deny or push it back.

TIP: Did You Know? You can create a rule in Outlook to route all of your employee’s absence requests to one folder? Please see Appendix A for more details.

2. The link will bring you to the PeopleSoft sign in screen, if you are not already signed in. Enter your User ID, Password and click Sign in.
3. You will be brought directly to the **Absence Request** screen for the employee that submitted the request. You can see the Absence Details and Current Balance as well. Click on the appropriate action you wish to take. For this example, click on **Approve**.

![Absence Request Screen](image)

4. The following **Approve** window appears. Enter any Approver Comments, if you choose, and click **Submit**.

![Approve Window](image)

You will then notice a green bar at the top of the screen that appears briefly and indicates **“You have approved the request.”**

5. The employees **Absence Request** screen appears again. You can now see that the request is approved.
Absence Approval Helpful Hints

**Absence Approval Routing**
If an employee’s Manager leaves the College, Absence Management automatically routes to the vacant Manager’s reports to for all absence approvals unless Human Resources updates the employee’s reports to. No employee can approve his/her own absence request.

*Note:* Absence requests not approved, will not be processed, and non-exempt employees’ pay can be affected!!

**Absences Approved by the Absence Management Administrator**
Any absences approved by the Absence Management Administrator will affect how the employee’s absence request history is indicated. The duration of the absence will indicate “Not Available.”

**Absence Cancelation Requests**
The employee can now request to cancel an absence they are no longer taking or edit an absence, you have already approved. If you have already approved the absence, any subsequent changes by the employee (i.e., cancelation or editing) will require your approval.

**Delegated Absences**
A delegated absence request for a future date, that has not yet been approved, will revert back to the employees’ Manager for approval after the delegation period is over.
Denied or Pushed Back Absences
If you have denied or pushed back an absence request, the employee has the opportunity to edit the absence request and resubmit or cancel the absence request altogether depending on your input. Employees are instructed to check their absence request history periodically for the status of their absence requests.

Email Notifications
You will automatically receive email notifications after the following actions:

- An employee submits an absence request and is awaiting approval. You can click on the link in the email to take action on the employee’s request.
- An employee submits an absence request cancelation or edit on an absence that you have already approved. You can click on the link in the email to take action on the employee’s request.
- When you enter an absence on behalf of one of your employees, the status will indicate approved, but the following emails will be sent:
  1. The employee will receive an email letting them know a request was submitted.
  2. The employee will receive an email letting them know the request was approved.
  3. You will receive an email indicating there is a request awaiting your approval, even though it approved automatically. This is a default email process, so you can ignore the email.

Employee Absence Balances
Staff accrue health and vacation monthly, so a low current balance is not always an indicator that they will not have enough time available for a future absence.
**Viewing Employee Leave Balances**

Managers have the ability to see an employee’s current leave balances at any time. This area allows Managers to look up leave balances for employees that report to them.

1. Click on the **Team Time** tile in the **Manager Self Service** homepage.

2. Click **Absence Balances**.
The screen below appears with all of your employees listed along with their photo.

3. Click on the employee name to view their absence balances.
4. The **Absence Balances** screen appears for the employee. Absence balances will display in hours for the selected employee by category of absence as seen below. To view another employee’s balances, click **Return to Select Employee**.

**Note:** The green drop down arrow to the right of the employee’s name will bring up shortcuts to various navigations. Refer to the **Actions** section for more information.

```
<table>
<thead>
<tr>
<th>Category</th>
<th>As Of 03/01/2020</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health</td>
<td></td>
<td>76.70 Hours</td>
</tr>
<tr>
<td>Vacation</td>
<td></td>
<td>66.70 Hours</td>
</tr>
<tr>
<td>Personal</td>
<td></td>
<td>13.33 Hours</td>
</tr>
<tr>
<td>Supplementary Leave</td>
<td></td>
<td>0.00 Hours</td>
</tr>
</tbody>
</table>
```

**Note:** Employees are advised to check leave balances before submitting an absence request, but they should keep in mind that the absence balances are only updated weekly on Monday’s. There is no forecasting tool.

### Viewing Employee Absence Requests

You have the ability to view the absence request history of your employees since the implementation of Absence Management.

1. Click on the **Team Time** tile in the **Manager Self Service** homepage.
2. Click View Requests.

The screen below appears with all of your employees listed along with their photo.

3. Click anywhere on the specific employee’s row whom you wish to view their absence request history.
4. The next screen shows you all absence requests and their status. In this example, the employee has one (1) absence request which is indicated by “1 row.”

**Note:** The green drop down arrow to the right of the employee’s name will bring up shortcuts to various navigations. Refer to the Actions section for more information.

**Note:** The funnel icon can be clicked and you can update the date parameters if you want to see any absences requests from further back or farther ahead.
Submitting an Absence Request for Your Employee

You can enter an absence request for one of your employees through the Manager Self Service homepage. Absence requests entered by Managers are approved automatically.

1. Click the Team Time tile in the Manager Self Service homepage.

2. Click Request Absence.
The screen below appears with all of your employees listed along with their photo.

3. Click anywhere on the specific employee’s row whom you wish to enter an absence request for.

4. The below Request Absence screen appears for that particular employee. Click the drop down arrow to select an absence category.

**Note:** The green drop down arrow to the right of the employee’s name will bring up shortcuts to various navigations. Refer to the Actions section for more information.

5. The following screen appears. Vacation was chosen as a category in the sample below.
You can see the current **Balance Information** at the bottom of the screen for the particular category. (Noted in **Red** in this screenshot)

- Complete the request filling in the **Start Date** and **End Date**.
- Answer **FMLA: Pending or Approved or No**.
- Answer **Is it for Family Bereavement?** This is a required field if you are requesting Health leave on an employee’s behalf. (Effective 07/01/2019, this question is no longer applicable to the Police Union.)
- Add any **Comments**, if you choose.
- The **Duration Hours** will populate automatically. If the hours indicated are not correct according to the employee’s work schedule, you will need to update the work schedule. Please see the section on **Updating an Employee’s Work Schedule**.
- Once complete, click **Submit**.

**Note:** Staff accrue health and vacation monthly, so a low current balance is not always an indicator that they will not have enough time available for a future absence.

**Note:** **Partial Days** defaults to **None**. If you select any option other than None, enter the number of hours to be used for the partial days(s). Hours must be entered in one quarter hour increments.

**Note:** Employees are discouraged from entering an absence for time off that is less than one (1) hour. Rather, it is advisable for the employee to make up the time in the week/pay period the time is missed.
6. When you click Submit, the following screen appears. Click “Yes” to submit the request. You will notice a green bar at the top of the screen which appears briefly and indicates “Submitted Successfully.”

7. The next screen appears which indicates the Status of the absence request as “Approved.” The request is automatically approved when a Manager enters it on their employee’s behalf.
Note: The following emails will be generated.

- You will receive an email request to approve the cancelation. This is a default email. The cancelation request automatically approves upon your submittal.
- The employee will receive three (3) emails:
  1. A notification the cancelation was submitted.
  2. A notification the cancelation was approved.
  3. A notification the original absence request is now canceled.

Canceling an Absence Request for Your Employee

You can cancel an absence request for one of your employees through Manager Self Service. Absence cancelations entered by Managers are approved automatically.

1. Click on the Team Time tile in the Manager Self Service homepage.
2. Click on **Cancel Absences**.

3. A list of employee’s that report to you appear. Click anywhere on the specific employee’s row whom you wish to cancel an absence request for.
4. The **Cancel Absences** screen appears for the employee. (Absence requests that are able to be canceled will appear here.) In this example, you can see the employee only has two (2) rows. This means only these two (2) requests are available to be canceled. Click anywhere on the absence request row you wish to cancel. For this example, we will cancel **Vacation**.

5. The below **Cancel Absence** screen appears. You can include a Comment if you choose, and then click **Cancel Absence**.
6. When you click **Cancel Absence**, the following screen appears. Click **“Yes”** to submit the cancelation request.

7. When you click **“Yes,”** you will then notice a green bar at the top of the screen that appears briefly and indicates **“Submitted Successfully.”** The **Cancel Absences** screen appears indicating the **Status** is now **Cancelled.** The cancelation is automatically approved when a Manager enters it on their employee’s behalf.
**Note:** The following emails will be generated.

- You will receive an email request to approve the cancelation. This is a default email. The cancelation request automatically approves upon your submittal.
- The employee will receive three (3) emails:
  4. A notification the cancelation was submitted.
  5. A notification the cancelation was approved.
  6. A notification the original absence request is now canceled.

**Summer Hours**

To the Absence Management system, summer hours are just a work schedule update. The summer work schedule will be input to deduct nine (9) hours for a day requested off. The summer work schedule only applies to full-time staff, not faculty.

If an absence request straddles the current and future summer work schedule, the system will know which dates are for the current schedule (8 hours per day) and which ones are for the summer schedule (9 hours per day).
If an absence request for the summer work schedule is requested before the schedules are updated, (i.e. Time requested in February for time off this Summer and the Summer schedule is not yet entered) the system will show 8 hours in the Duration Hours field for a full day off. BUT, when the absence processes the correct hours (9 hours) will be deducted.

Note: Part-time employees are not eligible for the summer work schedule. BUT, if they typically work on a Friday and the College is closed, you will need to update their work schedule in Absence Management to reflect the new summer work schedule. Managers are responsible for keeping part-time employees work schedules up-to-date in the system. Please refer to the next section entitled, **Updating an Employee’s Work Schedule** for instructions on how to do so.

Note: If the absence is requested with the Partial Day option of “All Days,” the absence request will **not** update when the work schedule changes.

### Updating an Employee’s Work Schedule

Work schedule changes only apply to non-exempt Board appointed employees. Part Time Flex and Student Workers do not need a work schedule in PeopleSoft.

If your employee’s work schedule has changed, you will need to update their schedule in the system in order for an absence day to correctly indicate the hours they are scheduled to work.

Work schedule updates need to be updated with the date the new schedule goes into effect, even if you update the employee’s work schedule in PeopleSoft a few days after they have already started this new schedule. If you update a schedule on Tuesday with an effective date of Monday (since that is when the employee started their new schedule) an absence for Monday (requested and approved prior to the change) will now be deducted based upon the new work schedule appropriately.

You will utilize the **Team Time** tile in the **Manager Self Service** homepage to update an employee’s work schedule.

1. Click on the **Team Time** tile.
2. Click on **Team Schedules and Reports**.

3. Click on **Assign Work Schedule**.
4. The **Assign Work Schedule** screen appears. Type the **employee’s last name** in the field next to Last Name. If you know the employee’s CLC Empl ID number, enter it in the Empl ID prompt.

5. Click the **Search** button.
Note: If an employee has two (2) record numbers, click on each to see which record has the position title in which you want to update the work schedule.

The Assign Work Schedule page will appear with the employee’s current work schedule and effective date. This employee’s current schedule is 1st shift.

6. Click on the + sign to the far right of the most recent effective dated row to add a new row.
7. Change the **Effective Date** on the row you just added (should be the top row) to the effective date of the start of the new work schedule.

8. At the **Assignment Method** prompt, the default is **Select Predefined Schedule**.

9. Click the magnifying glass under the **Schedule Group** prompt.

The **Look Up Schedule Group** window appears. You will see shift choices listed under the **Schedule Group** column.

10. If you would like to change this employee’s shift, choose one of the options used. For the example, we will choose **2ND SHIFT**. The Schedule Group field will populate with the shift you chose.
11. Click the magnifying glass under the Schedule ID field.
The Look Up Schedule ID window appears. The different Schedule ID choices in the left column indicate work start and stop times with a Description in the right column.

12. Click on the appropriate work schedule for your employee. For this example, we will choose the FT 1200P-0830P Schedule ID.

Note: If the new work schedule is not listed as a choice, please contact the Human Resources Business Analyst so a schedule can be created.
13. The Description field will populate with the new work schedule.

14. Click on the Show Schedule link in the new effective dated row to view the complete schedule for the week.
15. The Schedule Calendar page appears. This page shows you a breakdown of the new work schedule by days of the week. After reviewing the schedule, if you are satisfied that this is the correct schedule, click OK.

You will see the Assign Work Schedule page appear again.

16. Click Save. You have updated your employee’s work schedule!
Note: You can click on the arrow to the left of View History of Schedule Assignments, including default changes to view a history of the employee’s work schedules. (Noted in Red in the above screenshot.)

Setting Up Delegation for Absence Approval

If you are unable to approve employee absences due to vacation, leave of absence, etc. you will need to delegate your approval rights to another person. This delegation will need to be set up in advance. **You cannot backdate a delegation request.** To delegate absence approval:

1. Click the Delegation tile in the Manager Self Service homepage.
2. Three additional tiles will appear. Click on the Create Delegation Request tile.

The guide appears to walk you through the Delegation Request. The first step is the Delegation Dates.

3. At the Start Date prompt, select the date to begin delegating absences.
4. At the End Date prompt, select the date to end delegating absences.
5. The Comment box is a required field so please enter a reason for the Delegation
6. Click Next. This will take you to the next step in the Delegation process
**Note:** Per Human Resources procedure, you can only delegate for up to thirty (30) days maximum and delegation may not be open-ended. Delegations will be tracked by the Benefits and Leave Coordinator.

The **Delegates step (step 2)** will contain the list of possible employees (Delegates) you can delegate your transactions to.

**Note:** Your delegate choices listed are lateral to your position level or one step up or down. They also are currently managing an employee.

**Note:** You have the option to delegate all of your transactions to more than one delegate, in which case you would just check the box on one or more delegates. They will BOTH, once they accept your delegation, be able handle your transactions. You can also create separate delegations to delegate only certain transactions to certain delegates.

7. Check the **box** to the left of the person(s) to whom you would like to delegate your transactions to.
8. Click the **Next** button.
The **Transactions Step (step 3)** shows a list of all valid transactions that you can delegate.

9. Click the checkbox to the left of any of the transactions you would wish to delegate. You will need to at least delegate the **Manager Absence Approve** and **Manage Approve Payable Time**. These options allow your delegate to approve your employees’ absence requests and payable time! If you want to delegate all transactions listed, just click the **Select All** box and it will check all of the transactions for you.

10. Click **Next**
The **Review and Submit Step** (Step 4) appears. This step details your dates, chosen delegate and transaction information.

11. Click **Submit**.

12. Once you have submitted, you are sent back to the Delegations tile, where you see the three tiles related to different delegation actions.

13. If you wanted to see transaction you just submitted or you wanted to revoke it, you would go to the **Me Delegates Tile**

    ![Delegation Request](image)

**Note:** There are other tabs in the My Delegates tile that enable you to review different delegations you may have created.
The delegate you chose can choose to either accept or reject your request.

**Note:** The following emails will be generated:

- The delegate will receive:
  1. A notification indicating a delegation request has been submitted for review and acceptance.
  2. Once they accept or reject the request, a notification email confirming the action taken upon the delegation request will be sent

- The Delegator will receive:
  1. A notification once the delegate accepts or rejects the request.

**Note:** You will not receive an email if your delegate approves one of your employee’s absence requests. You can view an employee’s absence request history upon your return to review any absences not approved by you.

**Accepting a Delegation Request**

You will receive notification of a delegation request via email, if a Manager has requested you to be a delegate to approve absence requests in their absence. The subject of the email will indicate it is a delegation request.

There are 2 options for accepting delegation requests:

- Delegations Tile
- Email link
**Delegations Tile**

1. Click on the Delegation tile on the Manager Self Service homepage.

   ![](image)

   The three additional delegation tiles will appear.

2. Click on the My Delegated Authorities tile. The My Delegated Authorities page will appear.

   ![](image)

3. The delegation that is awaiting approval will appear under the Submitted tab. You can click the other tabs to see other delegation requests that have been sent to you and their statuses. When you open the page, the submitted tab will be the default tab.
4. The transactions that are assigned to you, are all listed out. If you click on the row it will appear in a different format. You can then click the **Return to My Delegated Authorities** link at the bottom.

5. Once you check the box to the left of the transactions, the **Accept** or **Reject** button will be available for selection.

6. Click **Accept** or **Reject**

**Note:** The delegation status is Inactive until the date of the delegation (Start Date) begins and changes back to Inactive after the date of the delegation (End Date) ends.

7. The following popup will appear. Click **Yes**

8. The Delegation will then be accepted. You will see a green bar appear quickly across the top of the page that says The Delegation Request has been Accepted.

9. If you clicked on the Accepted tab in the My Delegated Authorities tile, you will see your recently accepted delegation.
**Note:** After you have accepted a delegation request, you will be able to view the choices the requestor has given you access to as of the effective date of delegation. You will be able to approve their employee’s absence requests and perform other transactions at that time as well.

**Note:** If you accept a delegation request and you determine you are unable to fulfill the duties, you would contact the delegator and ask them to revoke the request. If the delegator is not available, you will need to contact the Benefits and Leave Coordinator to revoke the request on their behalf. **You cannot delegate just this delegation to someone else!**

**NEW:** If you accept a delegation request and you realize you will now be out of the office during part of the delegation, you can now create a new delegation to another delegate. This new delegation will move your transactions and the transactions from your previous accepted delegation to a new delegate. Once accepted, they will be able to approve absences and payable time for both delegations.

**Note:** You will only receive requests to approve absences beginning the date the delegation is in effect. Here is an example:

- The delegation date is effective from April 20, 2020 through April 30, 2020.
- If an employee completes and submits an absence request on April 1, 2020 for time off April 22, 2020 through April 24, 2020, this request will still go to their manager for approval, because the delegation has not started.
- If the employee completes and submits the request on April 21, 2020 for the same time period, the request will be automatically routed to the Delegate (you) for approval as the delegation has now started.

**Note:** If you receive an absence request for a future date that you would prefer the employee’s Manager approve, you will not need to do anything. Once the delegation period ends, the request will revert back to their Manager.

It is imperative you approve/deny/push back your employee’s absence request (or delegate in your absence)! Employee pay could be impacted!
Email Link
You can accept a Delegation Request via the link you receive in your email.

1. You will receive an email as indicated below. You can take action on the request through
   the link in the email. It will direct you to the appropriate page. Once on the page, you
   can view the request and either accept or reject it.

   ![Email Image](Image)

   You can review the request, then accept or reject the request, using the link below:
   
   https://thenetlink.co/PeopleSoft/WS/10/WS/10/EMPLOYEE/HRMS/YRDLY/ALL-EOO-LANDING-SEL?
   
   2. The link will bring you to the PeopleSoft sign in screen, if you are not already signed in.
      Enter your User ID, Password and click **Sign in**.

   ![Sign in Screen](Image)

   The **Manage Delegation** screen appears.

   3. Click on **Review My Delegated Authorities link**.

   ![Manage Delegation Screen](Image)

   4. This brings you inside the **My Delegated Authorities** tile.
5. The delegation that is awaiting approval will appear under the **Submitted** tab. You can click the other tabs to see other delegation requests that have been sent to you and their statuses. When you open the page, the submitted tab will be the default tab.

6. Click the checkbox next to the transactions. Once you check the box to the left of the transactions, the **Accept and Reject** button will be available for selection.

7. Click **Accept** or **Reject**

**Note:** The delegation status is Inactive until the date of the delegation (Start Date) begins and changes back to Inactive after the date of the delegation (End Date) ends.

8. The following popup will appear. Click **Yes**

9. The Delegation will then be accepted. You will see a green bar appear quickly across the top of the page that says The Delegation Request has been Accepted.

**Note:** An email will automatically generate to the delegator to inform them of the status.
Review My Proxies/Revoke a Delegation Request

If you want to review your proxies (the people you delegated work to) or revoke a delegation, you can easily do so.

1. Click on the Delegations tile on the Manager Self Service homepage.

2. Click the My Delegates tile on the Delegations page to see the status of your delegation requests.

3. The Active tab appears by default, but there are other tabs that contain the different statuses if you wanted to choose them.
4. If you needed to **revoke** the transaction(s) you sent to a certain delegate, you would check the box to the far left in that row.
5. Once you check the box to the left of the transactions, the **Revoke** button will be available for selection.
6. Click **Revoke**

![Image of Delegation page with Revoking options highlighted]

7. The following pop-up will appear. Click **Yes**

![Image of pop-up asking to confirm Delegation revocation]

8. The Delegation will then be revoked. You will see a green bar appear quickly across the top of the page that says The Delegation is Revoked.

**Note:** An email will automatically generate to the delegate to inform them the original request was revoked. They will receive one email for each transaction that was revoked.

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**My Team Tile**

The **My Team** tile, in the **Manager Self Service** homepage, allows Managers to view the following information on their direct reports at a glance:

- Their direct reports and if those direct reports have any direct reports
- Position title
- Department name
- Location

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• Campus email
• Preferred phone number
  • This number is for business use only and is not to be disclosed to anyone without express approval of Human Resources. This is also the number the emergency alert system utilizes.
• Leave balances
• Years of service
• Today’s status (i.e., whether they are absent for the day)

1. Click on the My Team tile in the Manager Self Service homepage.

2. The below Summary tab screen appears with a list of your direct reports in a grid view as the default. As you can see, there is a planned absence under Today’s Status for the first employee listed.
3. You can click on the **business card** icon to change the view to card view. The screen appears as number 4 on the next page.

4. Click on the **back arrow** icon. This flips the card(s) over.
The following screen appears where you can see your direct reports’ years of service with the College and their status for the current day.

5. Click on the **Leave Balances** tab.

6. The **Balances** screen appears. You can see each of your direct reports leave balances on the same screen.
Actions

While viewing employee information via various tiles, such as the Team Time tile, within the Manager Self Service homepage, you will notice a green drop down arrow to the right of the employee’s name will bring up shortcuts to various navigations.

Note: These green arrows are located on numerous pages within the Team Time and My Team tiles.

1. Click on the green drop down arrow from one of the pages.

The Actions box appears.

2. If you click on Time Management, you can choose either Request Absence, View Requests or View Balances. Once you make a selection, you will be directed right to the specific page for the employee you are currently reviewing.

3. If you click on Job and Personal Information, you can choose View Employee Personal Info. Here you can see the employee’s CLC ID number, position title, job code, first start date, department and position information. There are also links to home
and mailing addresses, email addresses, phone numbers, emergency contacts and person profile.

4. If you click on Development, you can choose View Current Team Profiles.

The Current Person Profile screen appears.

Current Person Profile displays your employee’s skills, competencies and accomplishments for an “as of” date. You can see the employee’s degrees and certifications, professional development and most recent staff evaluation.

**Appendix A**

The following are steps to create a folder in Outlook specifically to route employee absence requests:

1. Click on the File tab.
2. Click on the Manage Rules & Alerts button.
3. The **Rules and Alerts** window appears. Click on the **New Rule**... tab.
4. The **Rules Wizard** window appears. Click on the **Move messages with specific words in the subject to a folder**. Click **Next**.
5. The next window appears. Click on the hyperlink for **specific words**.

6. The **Search Text** window appears. Type **Absence** and then click **Add**.

7. You will see “Absence” has been added to the Search List field. Click **OK**.
8. The Rules Wizard window reappears. Click on the hyperlink for specified.

9. Another Rules and Alerts window appears where you can create a new folder for absence requests to route to. Double click on Inbox and then click New.
10. In the **Name** field type the name you would like to give the folder for absence requests. Next click **OK**.

11. The **Rules Wizard** window reappears. You can now see under Step 2 that email messages arriving with the word Absence in the subject will move to the Absence Requests folder. Click **Finish**.
Note: If you would like to see more advanced features, you can click Next to continue, but this is all you need to do to complete the rule.

12. The Rules and Alerts window reappears. Click Apply for the rule to take effect.
Absence Requests

Rule description (click an underlined value to edit):
- Apply this rule after the message arrives with Absence in the subject
- move it to the Absence Requests folder
- and stop processing more rules

Enable rules on all messages downloaded from RSS Feeds

OK Cancel Apply