Absence Management for Managers
Go-Live April 11, 2016

User’s Guide
The College of Lake County
3/4/2016
# Table of Contents

Absence Management for Managers – General Information ................................................................. 1
- Prior Pay Period Absences ........................................................................................................... 1
- Duplicate Date Entry .................................................................................................................. 1
- Absence Approval ...................................................................................................................... 1
- Vacation Tips ............................................................................................................................ 1
- Work Schedule Changes ............................................................................................................. 2
- Employees Working College Holidays (Special Situation) ......................................................... 2
- Tables of Data Entry Rules ......................................................................................................... 3

Accessing Absence Management .................................................................................................. 8
- Viewing Employee Absence Requests ...................................................................................... 13
- Viewing Employee Leave Balances ......................................................................................... 13
- Submitting an Absence Request for Your Employee ................................................................. 16
- Approving an Absence You Saved for Later .............................................................................. 22
- Summer Hours .......................................................................................................................... 25
- Updating an Employee’s Work Schedule .................................................................................. 25
- Setting Up Delegation for Absence Approval ......................................................................... 31
- Accepting a Delegation Request .............................................................................................. 37
- Absences Approved by the Absence Management Administrator .............................................. 41
- Pay Check Views ...................................................................................................................... 41
- Appendix A ............................................................................................................................... 43
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.**

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. The only exception to this is Discretionary Days, which can only be taken in full day increments, for Facilities and Police Union employees. 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.)

**Note:** Discretionary cannot be combined with any other absence category. But, if Discretionary absence request is greater than current available balance, the system will look to Vacation and deduct the remaining hours if available.

Absence Approval

If an employee’s Manager leaves the College, the employee’s reports to person moves up one level for absence request approvals. All requests will automatically route to this individual. No employee can approve his/her own absence request.

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.).
**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 addresses 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><strong>Staff</strong> (Non-Union)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Regular Leave:</strong></td>
<td>Health, Vacation and Personal</td>
<td>A required field for Health, Vacation and Personal requests is: “Is it for a Leave of Absence?” 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><strong>Other Leave:</strong></td>
<td>Jury Duty</td>
<td>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)</td>
</tr>
<tr>
<td></td>
<td>Military</td>
<td></td>
</tr>
<tr>
<td><strong>Reminder:</strong> Timely Requests Required</td>
<td></td>
<td>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.”</td>
</tr>
</tbody>
</table>

- **Health** – 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.”
- **Vacation** – Cannot be utilized during initial probationary period. If requested during initial probationary period, it will go to Unpaid status.
- **Personal** – Manager approval required prior to the requested day.
- **Jury Duty** – Employee is to submit a copy of court summons to the Benefits and Leave Coordinator in Human Resources.
- **Military Leave** – Please refer to the Board Policy for terms of usage.
<table>
<thead>
<tr>
<th>Job Category</th>
<th>Time off Categories</th>
<th>Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilities Union</td>
<td>Regular Leave:</td>
<td>A required field for <strong>Health, Vacation and Personal</strong> requests is: “Is it for a Leave of Absence?” 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><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 3 or more consecutive days of work is required to submit a doctor’s note for the absence to be verified. (Excluding time for bereavement)</td>
</tr>
<tr>
<td></td>
<td>• Vacation</td>
<td><strong>Vacation</strong> – Cannot be utilized until after completing 3 months of employment. If requested during the first 3 months, it will go to Unpaid status.</td>
</tr>
<tr>
<td></td>
<td>• Personal</td>
<td><strong>Personal</strong> – Cannot be utilized during initial probationary period. If requested during initial probationary period, it will go to Unpaid status.</td>
</tr>
<tr>
<td></td>
<td>• Special Emergency</td>
<td><strong>Special Emergency</strong> – The reason for utilizing is a required field and is limited to ten (10) characters. Please abbreviate as much as possible. Please refer to your Contract for applicable usage.</td>
</tr>
<tr>
<td></td>
<td>• Discretionary</td>
<td><strong>Discretionary</strong> – To be utilized in full day increments only. Requires prior supervisor approval. Cannot be combined with any other absence category for the same 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>Professional Meeting</strong> – To be utilized to attend special programs, workshops or conferences with prior approval of supervisor.</td>
</tr>
<tr>
<td></td>
<td>• Professional Meeting</td>
<td><strong>Military Leave</strong> – Please refer to your Contract for terms of usage.</td>
</tr>
<tr>
<td></td>
<td>• Military Leave</td>
<td><strong>Release</strong> – Up to 3 days per calendar year shall be granted to conduct Union business (The Union shall give advance notice and certify).</td>
</tr>
</tbody>
</table>

**Reminder:** Timely Requests Required
<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>A required field for Health, Vacation and Personal requests is: “Is it for a Leave of Absence?” 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>Health – Another required field for a Health request is: “Is it for Family Bereavement?” You will answer either “Yes” or “No.”</td>
</tr>
<tr>
<td></td>
<td>• Vacation</td>
<td>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. (Excluding time for bereavement)</td>
</tr>
<tr>
<td></td>
<td>• Personal</td>
<td>Vacation - Cannot be utilized until after completing 3 months of employment. If requested during the first 3 months, it will go to Unpaid status.</td>
</tr>
<tr>
<td></td>
<td>• Special Emergency</td>
<td>Personal – Manager approval required prior to the requested day.</td>
</tr>
<tr>
<td></td>
<td>• Discretionary</td>
<td>Special Emergency – The reason for utilizing is a required field and is limited to ten (10) characters. Please abbreviate as much as possible. Please refer to your Contract for applicable usage.</td>
</tr>
<tr>
<td></td>
<td>Other Leave:</td>
<td>Discretionary – To be utilized in full day increments. Requires prior supervisor approval. Cannot be combined with any other absence category for the same day.</td>
</tr>
<tr>
<td></td>
<td>• Jury Duty</td>
<td>Jury Duty - Employee is to submit a copy of court summons to the Benefits and Leave Coordinator in Human Resources.</td>
</tr>
<tr>
<td></td>
<td>• Military Leave</td>
<td>Military Leave – 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>
</tbody>
</table>

**Reminder: Timely Requests Required**
<table>
<thead>
<tr>
<th>Job Category</th>
<th>Time off Categories</th>
<th>Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-Time Faculty &amp; Term Limited Faculty (Load Hour)</td>
<td>Regular Leave:</td>
<td>Health – 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>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 Health are:</td>
</tr>
<tr>
<td></td>
<td>Other Leave:</td>
<td>1. “Is it for a Leave of Absence?” 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>
<tr>
<td></td>
<td></td>
<td>Personal - Time requested is to be in four (4) or eight (8) hour increments, per the Faculty Contract.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>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></td>
<td>Jury Duty - Employee is to submit a copy of court summons to the Benefits and Leave Coordinator in Human Resources.</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><strong>Full-Time Faculty &amp; Term Limited Faculty</strong>&lt;br&gt;(Clock Hour – Librarians/Counselors)</td>
<td>Regular Leave:</td>
<td>Health – 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 Health are:</td>
</tr>
<tr>
<td></td>
<td>• Personal</td>
<td>1. “Is it for a Leave of Absence?” 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></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>May be entitled to one (1) day per semester or two (2) days, depending on total consecutive semesters taught. Please refer to your contract.</td>
</tr>
<tr>
<td>(Clock Hour – Librarians/Counselors)</td>
<td>• Personal</td>
<td>*Not yet active. Will continue to use current process</td>
</tr>
<tr>
<td></td>
<td>Other Leave:</td>
<td>Professor Emeritus (Clock Hour – Librarians/Counselors)</td>
</tr>
<tr>
<td></td>
<td>• Bereavement</td>
<td>Regular Leave:</td>
</tr>
<tr>
<td></td>
<td>• College Business</td>
<td>• Personal</td>
</tr>
<tr>
<td></td>
<td>• Jury Duty</td>
<td>Other Leave:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Professional Meeting</td>
</tr>
</tbody>
</table>
Accessing Absence Management

1. Launch a browser (either Internet Explorer or Mozilla Firefox).
2. Log in to the CLC Portal.
3. Enter user name.
4. Enter password.
5. Click Login.

6. Click the Employee Self Service link.
You can use People Soft Employee Self Service to view absence requests. This area allows Managers to view all of the absence requests and statuses for employees who report to them.

1. Click **Manager Self Service**.

2. Click **Time Management**.

3. Click **Approve Time and Exceptions**.

4. Click **Absence Requests**.
The Absence Requests screen will display, where you can view all of your employees’ absence requests (Pending, Approved and Denied). The default status is Pending. (If you have accepted a delegation request to approve absences for someone else, you will see their employee’s absence requests here as well.)

5. If desired, **filter** the requests by selecting either Pending approval, Approved or Denied at the Show Requests by Status: prompt.

6. Click the **Refresh** button to view the different status of approvals if you have applied a filter.

**Note:** The View Monthly Calendar option is not available as Time and Labor has not yet been implemented. If you click on it, you will receive a security error.

7. Click the **Employee Name** to view the employee’s pending request(s).

---

<table>
<thead>
<tr>
<th>Absence Requests</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select the requester’s name link to approve or deny the request. You can view the monthly calendar for your direct reports by selecting the View Monthly Calendar link. To view all requests or previously approved/denied requests, use the Show Requests by Status and select the Refresh button.</td>
</tr>
</tbody>
</table>

---

<table>
<thead>
<tr>
<th>Absence Requests</th>
<th>Employee Name</th>
<th>ID</th>
<th>Job Title</th>
<th>Absence Name</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
<th>Submitted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Name</td>
<td>ID</td>
<td>Employee Title</td>
<td>Vacation</td>
<td>11/09/2015</td>
<td>11/11/2015</td>
<td>Submitted</td>
<td>12/01/2015</td>
<td></td>
</tr>
<tr>
<td>Employee Name</td>
<td>ID</td>
<td>Employee Title</td>
<td>Personal</td>
<td>11/18/2015</td>
<td>11/19/2015</td>
<td>Submitted</td>
<td>12/01/2015</td>
<td></td>
</tr>
</tbody>
</table>

---

The Request Details page will display for the selected employee, where you can review each request and any requestor comments associated with the request. From this page you can:

- View the employee’s absence request history (since the implementation of Absence Management).
- View the employee’s absence balances
- Deny an absence request
- Approve an absence request
- Push back an absence request
8. Click **Approve, Deny or Push Back** at the bottom of the window.

If you choose to Push Back or Deny an absence request, you should enter a comment at the Approver Comments prompt.

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.

**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.
9. Click **Yes** to proceed to the next step in the approval process, or **No** to return to the previous step.

   ![Request Details]
   
   **Approval Confirmation**
   
   Are you sure you want to Approve this Absence Request?
   
   ![Yes][No]

If you selected **Yes**, the following screen will display:

10. Click **OK**.

   ![Request Details]
   
   **Approve Confirmation**
   
   The Absence Request was successfully approved.

   ![OK]

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 page periodically for the status of their absence requests.

**Note:** Once you have approved an employee’s absence, any changes/deletions can only be made by the Benefits and Leave Coordinator. After communication with the employee, you will send an email to the absences@clcillinois.edu email with the details. Change requests directly from an employee will not be accepted!

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.
- You have taken action on an employee’s absence request by either approving, denying or pushing back.
- You have entered an absence for one of your employees.

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

Once an employee has submitted an absence request, you will receive an email like the following:

There is an Absence Request awaiting your approval

- Employee Id: XXXXXX - Employee Name
- Department: Department Name
- Job Title: Title
- Absence Start Date: 2013-10-15
- Absence Name: 100018 - CLC VAC - Vacation
- Absence End Date: 2013-10-15
- Status: Submitted
- Comments:

Please use the following link to view the transaction:

You can click on the link to view the absence request and either approve, deny or push back the absence request.

_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.

There are 3 ways to reach the Absence Requests page:

- If you are signed into PeopleSoft already, you can click on the link in the email and you will be taken to the Absence Requests page.
- If you are not currently signed into PeopleSoft, you can click on the link in the email and it will open the PeopleSoft login screen. You will sign-in and then you will be taken directly to the Absence Requests page.
- If you do not click the link in the email and you are signed into PeopleSoft already, the navigation to approve, deny or push back an absence request Main Menu>Time Management>Approve Time and Exceptions>Absence Requests

_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.

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 Manager Self Service.
2. Click **Time Management**.

3. Click **View Time**.

4. Click **Absence Balances**.

*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. *(FYI – 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.)*
5. Click the **Select** button to the left of the employee for whom you would like to view absence balances.

Absences balances will display in hours for the selected employee by category of absence as seen below.
Submitting an Absence Request for Your Employee

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

1. Click Manager Self Service.

2. Click Time Management.

3. Click Report Time.

4. Click Absence Request.

A list of your employees will display. The Employee Reporting as of: prompt will automatically default to the current date.
5. Click the **Select** button to the left of the employee for whom you would like to submit an absence request.

6. Click on the date navigator and select the **beginning date** of the absence request at the Start Date: prompt.

   **Note:** You will not see an End date until you have selected the type of absence at the Absence Name: prompt.

7. At the Filter by Type: prompt, select the **filter** to be applied: All, Other Leave or Regular Leave. (Regular Leave will be utilized more frequently.)

   The table below explains how each filter will be applied. Keep in mind that categories of leave available to employees varies by job position.

<table>
<thead>
<tr>
<th>Filter Type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>All categories of absences will be available for your specific job category</td>
</tr>
<tr>
<td>Other Leave</td>
<td>Only categories that are not in the regular leave category will be available for your specific job category</td>
</tr>
<tr>
<td>Regular Leave</td>
<td>Regular leave category items will be available based on your job category (these are leaves that deduct from a balance)</td>
</tr>
</tbody>
</table>
8. At the Absence Name: prompt, select the **type of absence** being requested.

Current leave balances for this category will display on the right side of the window (excluding any unprocessed hours) and the End Date: prompt and Partial Days: prompt will now be visible.

9. Click on the date navigator and select the **ending date** of the absence request at the End Date: prompt.

10. At the Partial Days prompt, shown in the screenshot above, select **one of the following options**: All Days, End Day Only, None, Start Day Only, Start and End Days.

**Note:** If you are requesting a single day off, you will indicate the same Start Date and End Date.

11. If you select any option other than None, enter the **number of hours** to be used for the partial day(s). Hours must be entered in ¼ hour increments.
Hours should be entered as follows:

<table>
<thead>
<tr>
<th>Time to Be Taken</th>
<th>Entry at Hours: Prompt</th>
</tr>
</thead>
<tbody>
<tr>
<td>15 Minutes</td>
<td>.25</td>
</tr>
<tr>
<td>1 Hour and 15 Minutes</td>
<td>1.25</td>
</tr>
<tr>
<td>30 Minutes</td>
<td>.5</td>
</tr>
<tr>
<td>1 Hour and 30 Minutes</td>
<td>1.50</td>
</tr>
<tr>
<td>45 Minutes</td>
<td>.75</td>
</tr>
</tbody>
</table>

12. Click the **Calculate Duration** button to view the total leave hours requested.

**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.
13. The duration prompt will automatically populate based on the employee’s work schedule. (If the hours indicated are not correct according to the employee’s work schedule, Managers are to have the work schedule corrected/updated.)

   a. This example is for an employee who works 9 hours a day. This Manager created the request for 4.5 hours off on the first day and a full day off on the second day for their employee. This amounted to a total hours requested of 13.5.

   **Note:** For more partial day examples, please refer to Question 15 in the Employees Section of the Absence Management FAQ’s located on the Human Resources Intranet.

14. At the “Is it for a Leave of Absence?:” Prompt, type either **yes** or **no** to answer the question. This is a required field.

15. If the “Is it for Family Bereavement?:” Prompt is visible, type **yes** or **no** to answer the question. (This is a required field if you are requesting Health leave on an employee’s behalf.)

16. Click **Submit**, to submit the request. You do have an option to click **Save for Later** to finish the request at another time. However, you will have to remember to go back into this particular employee’s history and submit at a later date and this may not be feasible for Managers given their busy schedules. The employee will be able to see the saved request in their Absence Request History, but will be unable to act upon it.
17. If you clicked **Submit**, the following screen appears. Click “Yes” to submit your request to your manager.

18. The **Save Confirmation** screen appears. Click **OK**.
19. The **Request Details** page will appear indicating the request has been submitted by the employee and approved by the Manager (you). Even though you are the one who entered the request on behalf of the employee, the system sees the request as coming from the employee. An email message will also be sent to you and the employee acknowledging the request was submitted and approved.

### Approving an Absence You Saved for Later
To approve an absence that you saved for later:

1. **Main Menu > Manager Self Service > Time Management > View Time > Absence Request History**
2. Click on **Select** next to the employee name for whom you will be approving the saved absence request.
In the next screen, in the Status column, will see the “Saved” request.

3. Click on the **Edit** button.
4. Make the necessary changes to complete the absence request.
5. Click **Submit**.

6. Click **Yes**.

7. Click **OK**.
**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 a duration of 8 hours for a full day off when you click the Calculate Duration button. 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. Human Resources will update the summer work schedule for applicable part-time employees for the summer 2016 year and change the schedule back at the end of this summer to the regular work schedule. **Any schedule changes after this point will be your responsibility.** Please refer to the next section entitled, Updating an Employee’s Work Schedule for instructions on how to do so.

**Updating an Employee’s Work Schedule**

Work schedule changes only apply to non-exempt employees (employees that will be clocking in/out with Time and Labor). 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.

To update a work schedule:

1. **Main Menu > Manager Self Service > Time Management > Manage Schedules > Assign Work Schedule.**
2. 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.
3. 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.

4. Click on the + sign to the far right to add a row.
5. Change the Effective Date on the row you just added (top row) to the effective date of the new work schedule.

6. At the *Assignment Method prompt, keep the default value of ‘Select Predefined Schedule.’

7. Click the magnifying glass under the Schedule Group prompt.

8. You will see groups of shift choices listed under the Schedule Group column.

9. If you would like to change this employees’ shift to a 2\textsuperscript{nd} shift, you will click on \textbf{2ND SHIFT}. The Schedule Group field will populate with \textbf{2ND SHIFT}.
10. Click the magnifying glass under the Schedule ID field.

11. You will now see different Schedule ID choices in the left column indicating work start and stop times with a Description in the right column.
12. Click on the appropriate work schedule for your employee. If the new work schedule is not listed as a choice, please contact the Payroll Business Analyst so a schedule can be created. For this example, we will choose the 4th Schedule ID.

13. The **Description** field will populate with the new work schedule.

14. If you click on the **Show Schedule** link in the new effective dated row, you will see the Schedule Calendar page appear. This page shows you a breakdown of the new work schedule by days of the week.
15. After reviewing the schedule, if you are satisfied that this is the correct schedule, click **OK**.

16. You will see the Assign Work Schedule page appear again.

17. 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.

18. Click **Save**. You have updated your employee’s work schedule!
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 back date a delegation request.* To delegate absence approval:

1. Click **Main Menu**.

2. Click **Self Service**.

3. Click **Manage Delegation**.

The following Manage Delegation screen will display.

4. Click **Create Delegation Request**.
5. At the From Date: prompt, select the date to begin delegating absences.
6. At the To Date: prompt, select the date to end delegating absences.

**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.

7. Click the Next button.

![Create Delegation Request](image)

The Create Delegation Request screen will display.

8. Click the checkbox to the left of **Manager Absence Approve**. This is the option that allows proxies to approve your employee(s) absence requests!!

9. Click the Next button.

**Note:** There are other rights that can be given as well.
You will view a list of possible employees (proxies) to delegate to.

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

10. Activate the **radio button** to the left of the person to whom you would like to delegate the options you have chosen above.

11. Click the **Next** button.
12. Click the **Submit** button.

13. Click **OK**. You will then return to the Manage Delegation page.
The delegate you invite can choose to either accept or deny your request.

**Note:** You will not receive an email if your delegate approves one of your employee’s absence requests. You can view an employees’ Absence Request History to determine any absences you have not approved.

14. Click **Review My Proxies** on the Manage Delegation page to see the status of your delegation requests.
The My Proxies page appears. You can view which proxy requests have been submitted, ended or revoked.

15. You can also revoke any requests here by clicking the box next to the request you want to revoke and then click on the **Revoke** button.

The Revoke Delegation Request page will appear.

16. Click **Yes** to continue or **No** to cancel.
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 3 options:

- If you are signed into PeopleSoft already, you can click on the link in the email and you will be taken to the Manage Delegation page.
- If you are not currently signed into PeopleSoft, you can click on the link in the email and it will open the PeopleSoft login screen. You will sign-in and then you will be taken directly to the Manage Delegation page.
- If you do not click the link in the email and you are signed into PeopleSoft already, the navigation to Manage Delegation is in the next step.

To accept a delegation request:

1. **Main Menu > Self Service > Manage Delegation**
2. If you click on **Learn More about Delegation**, there is a definition of what delegation is and there is also a list of FAQ’s.
3. Click on the **Review My Delegated Authorities** link. My Delegated Authorities page will appear as follows:

<table>
<thead>
<tr>
<th>Manage Delegation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
</tr>
<tr>
<td>Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.</td>
</tr>
<tr>
<td><strong>Learn More about Delegation</strong></td>
</tr>
<tr>
<td><strong>Create Delegation Request</strong> to choose transactions to delegate and proxies to act on your behalf.</td>
</tr>
<tr>
<td><strong>Review My Proxies</strong> to review the list of transactions that you have delegated and the proxy for each transaction.</td>
</tr>
<tr>
<td><strong>Review My Delegated Authorities</strong> to see the list of transactions that have been delegated to you by others, and to accept or reject pending delegation requests.</td>
</tr>
</tbody>
</table>

2
3
If you have accepted a delegation request previously, you will see a link for **Review My Proxies** as well.

If you click the drop down arrow next to **Show Requests by Status**, you can choose to view which requests have been submitted, ended, rejected or revoked.

4. **Submitted** is the default.

If you make another choice, you will need to click Refresh to update the page. You will see a list of Managers that have requested you as a delegate.

5. You can click the check box on the row you want to review and then click on the Details icon to see what is being requested of you.
The Delegation Request Details page appears.

6. You can review the request and click the **Return to My Proxies** link.

7. To accept the delegation request, click the **checkbox** to the left of the Transaction request for the name you will be accepting the request from.
8. Click the **Accept** button.

**Note:** The delegation status is Inactive until the date of the delegation (From Date) begins and changes back to Inactive after the date of the delegation (To Date) ends.
The Accept Delegation Request page will appear.

9. Click **OK**.

![Accept Delegation Request](image)

You will return to the Manage Delegation page. From this screen you can do various delegation items utilizing the links provided.

![Manage Delegation](image)

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 at that time as well.

**Once you accept a delegation request and you determine you are unable to fulfill the duties, you would contact the delegator 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 the delegation to someone else!**

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

- The delegation date is effective from December 17, 2015 through December 23, 2015.
- If an employee completes and submits an absence request on December 16, 2015 for time off December 17, 2015 to December 23, 2015, 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 December 17, 2015 for the same time period, the request will be automatically routed to the delegate for approval as the delegation has now started.

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 that you approve/deny/push back your employee’s absence request (or delegate in your absence)!

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.”

Pay Check Views
The following are examples of self-service pay check views for various employees utilizing paid time off, jury duty or has unpaid time off.

a. The example below is for an employee that will not clock in or out on Time and Labor. All employees will be in this category until Time and Labor is implemented. Once it goes live, Non Exempt employees will utilize Time and Labor and their pay check example is shown below in 7b. The example below shows an employee who had 16 hours of Military Leave and 24 hours of paid time off. He did not have any Unpaid Time Off. The total in paid leave (Military and the Paid Time Off together) was equal to 40 hours so this exact amount is deducted from their regular earnings pay. This way the system can track how the hours were paid out. He was paid for a total of 80 hours.

If an employee’s absence request resulted in time off that was unpaid, the paycheck will show an Unpaid Time Off row and the amount of the absence will be deducted from the Earnings column.
b. The example below shows a paycheck of a Time Reporter (a non-exempt employee that clocks in and out) through Time and Labor. Since the employee punches in and out, their regular earnings hours only account for the time they actually worked. Any paid time off is added to those regular hours, not deducted from them as they are in the non-time reporter example above in 7a. This employee did NOT have enough paid time off to account for his absences so his absences went unpaid. Here, the employee worked 64 hours and received Holiday Pay for 8 hours. This only amounts to 72 hours of paid time. As you can see, they received no earnings for the 8 hours of Unpaid Time Off.

<table>
<thead>
<tr>
<th>Description</th>
<th>Rate</th>
<th>Current Hours</th>
<th>Earnings</th>
<th>YTD Hours</th>
<th>Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular Earnings</td>
<td>$00.00</td>
<td>72.00</td>
<td>1,336.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Holiday</td>
<td></td>
<td>8.00</td>
<td>96.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Discretionary Allowance**

<table>
<thead>
<tr>
<th>Description</th>
<th>Rate</th>
<th>Current Hours</th>
<th>Earnings</th>
<th>YTD Hours</th>
<th>Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular Earnings</td>
<td>$00.00</td>
<td>-40.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paid Time Off</td>
<td></td>
<td>24.00</td>
<td>24.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Military Leave</td>
<td></td>
<td>16.00</td>
<td>16.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Days</td>
<td></td>
<td></td>
<td>40.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sick Pay</td>
<td></td>
<td></td>
<td>24.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vacation Pay</td>
<td></td>
<td></td>
<td>144.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL:** 80.00 1,680.00

<table>
<thead>
<tr>
<th>Description</th>
<th>Rate</th>
<th>Current Hours</th>
<th>Earnings</th>
<th>YTD Hours</th>
<th>Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>$00.00</td>
<td>8.00</td>
<td>8.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regular Earnings</td>
<td></td>
<td>64.00</td>
<td>640.40</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shift Diff NonUnion Shift 2</td>
<td>$00.00</td>
<td>8.00</td>
<td>8.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unpaid Time Off</td>
<td></td>
<td>8.00</td>
<td>0.00</td>
<td>8.00</td>
<td></td>
</tr>
<tr>
<td>Regular Overtime</td>
<td></td>
<td>2.00</td>
<td></td>
<td>2.00</td>
<td></td>
</tr>
<tr>
<td>Holiday</td>
<td>$00.00</td>
<td>16.00</td>
<td>16.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Days</td>
<td></td>
<td></td>
<td>7.60</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL:** 90.00 690.00
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**. Then 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**.

![Image of Create New Folder window]

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**.

![Image of Rules Wizard window]

**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.