

# **North Dakota University System**

## **Absence Management Employee Self Service Training Manual**

PEOPLESOFT

**VERSION 9.1**

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# Employee Self Service - ABSENCE MANAGEMENT

## OVERVIEW

After the initial rollout for each campus, all employees who earn leave will request time off through the Absence Management module in PeopleSoft. This applies to all types of leave: sick (with the subset of dependent sick), annual, comp time, jury, military and funeral.

An absence can be requested for an event that occurred in the past (e.g. a sick day) or for an event to occur in the future, such as annual leave. All absences should be entered by the employee, and approved by the supervisor, no later than the end of the pay period in which the absence occurs.

An absence cannot be requested for a date an employee is not scheduled to work. Employee balances reflect the pay period of the most recent check. For example, if today is April 22; the last paycheck was April 15th, the pay period for April 15th paycheck is March 16th-31st. The leave balances would be current as of March 31st. Please contact your Human Resources/Payroll Office if you feel your balances are incorrect.

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**NOTE: During the initial rollout, leave balances from the old method of taking leave will not display in Absence Management until after the first payroll runs under the new method. This is a planned part of the conversion process.**

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The business process under the new process is as follows:

1. An employee signs into PeopleSoft and enters a leave request before (for planned absences) or after (for unplanned absences) an event.
2. The supervisor signs into HRMS and reviews absence approvals as needed
3. The supervisor has three choices for taking action on the request:
  - a. Approve – the employee receives an approval email
  - b. Deny – the employee receives a denial email
  - c. Push back – the employee receives an email requesting modification of the request.
4. If the request is approved, it is processed in the next pay cycle.

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**NOTE: Once an absence request has been approved, it cannot be canceled by the employee or the supervisor. Let your supervisor know if you need to cancel a submitted or approved absence request**

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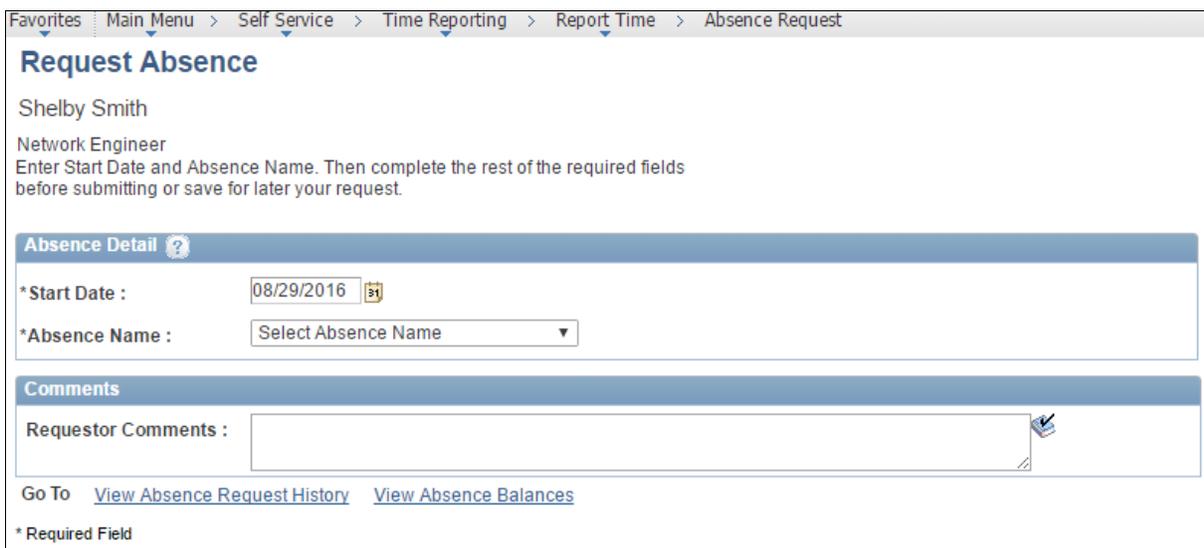
# REQUEST SINGLE DAY ABSENCE (FULL DAY)

Click on Absence Request Link on the home page once logged into HR or you can navigate to the Absence Request

Self Service>Time Reporting>Report Time>Absence Request



The resulting screen will look like this:



**Start Date** – Enter the Start Date of the absence

**Absence Name** – select absence type

This will only display absence types that are associated with your eligibility. For example, only non-exempt employees will see the “Comptime Taken” option.

- Annual Leave
- Comptime taken
- Funeral Leave
- Jury Duty
- Military Leave
- Sick

Select your Absence Name. Once you select the Absence Name, the End Date will display below the Start Date.

When you choose an absence type/name, the screen will change to match the fields needed for that type of leave:

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*The Current Balance will also display. This is your current balance for the leave type you are requesting*

*Remember that leave requests not yet processed will not be taken into account.*

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**Partial Days** For absences of less than a full day, use this field to enter the number of hours that you were absent. The available values in the Partial Days field when the absence is calculated in days include:

**All Days** – Indicates that every day of absence is a partial day.

**End Day Only** – Indicates that every day of the absence with the exception of the last day was a full day off.

**None** – Indicates that all days are full days at your regularly scheduled hours.

**Start Day Only** – Indicates that every day of the absence with the exception of the first day was a full day off.

**Start and End Days** – Indicates that on a leave 3-days or more, the first day of the absence is a partial day, and the last day of the absence is a partial day – the days in between the Start and End Date will be recorded as full days off.

**Calculate Duration** - Once you have entered in the details for your absence, click the **Calculate Duration** button. Duration will then calculate the number of hours as per your schedule, the Start and End Dates, and any Partial Days that you have completed.

You can choose to either **Submit** the absence or **Save for Later**.

[Favorites](#) | [Main Menu](#) > [Self Service](#) > [Time Reporting](#) > [Report Time](#) > [Absence Request](#)

## Request Absence

Shelby Smith  
 Network Engineer  
 Enter Start Date and Absence Name. Then complete the rest of the required fields before submitting or save for later your request.

**Absence Detail** ?

\* Start Date :  BT

End Date :  BT

\* Absence Name :  ▼ Current Balance : 285.97 Hours\*\*

Partial Days :  ▼

Duration :  Hours

**Additional Information**

Start Time:  End Time:

**Comments**

Requestor Comments :

Go To [View Absence Request History](#) [View Absence Balances](#)

\* Required Field

\*\*Disclaimer The current balance does not reflect absences that have not been processed.

Comments can be added, but are not required unless required by your supervisor.

The employee can use the hyperlinks to:

**View Absence Request History** to see your absence request history  
 YOU CANT EDIT YOUR REQUEST FROM HERE to edit you saved request navigate to  
 SELF SERVICE > TIME REPORTING > VIEW TIME > ABSENCE REQUEST HISTORY

**View Absence Balances** to see balances for *all* types of earned leave

If you **Save for Later** you will get a message that the Absence Request was successfully saved. The request must be submitted in order for it to be approved.

Once the Absence Request is ready to be submitted, and the employee chooses the Submit button, the following message will display:

After choosing “**Yes**” you will receive confirmation the Absence Request was successfully submitted, click OK

Once submitted, the system will provide you the details of your absence and show the approval needed.

Note the request is showing as **Pending**. If the employee clicks the **Multiple Approvers** hyperlink, he or she will see the two people who can approve the request. Though two will show as approvers only one person needs to approve the request.

**Request Details**

Shelby Smith  
Network Engineer  
View Request Status and Approval Details

**Details** ?

Start Date : 08/29/2016  
End Date : 08/29/2016  
Absence Name : Annual Leave Current Balance : 285.97 Hours\*\*  
Partial Days : None  
Duration : 8.00 Hours

**Additional Information**

Start Time: End Time:

**Workflow**

Status : Submitted

**Request History** Personalize | First

Status	Name	Date	Comments
Submitted	Shelby Smith	08/29/2016	

**AbsenceManagement**

▼ **Absence Management: Pending** →

Absence Management

Pending

**Multiple Approvers**

AB: List EEs 2 hrs of rpts to

\*\*Disclaimer The current balance does not reflect absences that have not been processed.

# VIEWING ABSENCE REQUEST HISTORY, VIEWING ABSENCE BALANCES AND FORECASTING

Self Service>Time Reporting>View Time>Absence Request History

**Absence Request History**

Oliva Johnson  
NDUS SITS Professional

Specify the date range of interest. To retrieve a complete history, leave From and Through dates blank and select the Refresh button. Select the absence name link to view request details. Select edit button to modify or delete the request.

From : 01/14/2016 Through : 07/12/2016 Refresh

Absence Name	Status	Start Date	End Date	Edit
<a href="#">Dependent Sick</a>	Submitted	04/28/2016	04/28/2016	<a href="#">Edit</a>
<a href="#">Annual Leave</a>	Submitted	04/27/2016	04/27/2016	<a href="#">Edit</a>
<a href="#">Annual Leave</a>	Needs Approval	04/26/2016	04/26/2016	<a href="#">Edit</a>
<a href="#">Annual Leave</a>	Approved	04/21/2016	04/22/2016	<a href="#">Edit</a>
<a href="#">Annual Leave</a>	Saved	04/20/2016	04/20/2016	<a href="#">Edit</a>
<a href="#">Sick Leave</a>	Submitted	04/20/2016	04/20/2016	<a href="#">Edit</a>
<a href="#">Annual Leave</a>	Needs Approval	04/13/2016	04/13/2016	<a href="#">Edit</a>
<a href="#">Annual Leave</a>	Approved	03/16/2016	03/16/2016	<a href="#">Edit</a>
<a href="#">Sick Leave</a>	Submitted	03/15/2016	03/15/2016	<a href="#">Edit</a>

Select the From: and Through: dates to populate the periods you wish to view. Click Refresh

If the absence status is “**Submitted**” or “**Approved**”, you will NOT be able to edit the absence.

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***You need to contact your supervisor if you need to change a submitted or approved absence request.***

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To edit a “**Saved**” Absence Request, click on the EDIT button, complete the details of the absence request.

The supervisor can take the following action with the Absence Request:

1. Approve
2. Deny
3. Push back

In all three instances, the employee will receive a PeopleSoft-generated email informing them of the outcome. If the employee has any questions, they should consult their supervisor.

## VIEW ABSENCE BALANCES - DETAIL

Self Service>Benefits>Absence Balances

View your Absence Balances by Check Date by selecting from the drop down the check date you want to see. It defaults to the most current Check Date.

**NORTH DAKOTA UNIVERSITY SYSTEM** You are on Database: HEHT

Favorites Main Menu > Self Service > Benefits > Absence Balances

**Shelby Smith** Employee ID: 0172018  
 Job Title: Network Engineer Empl Record: 1

Year: 2016 Check Date: 07/29/2016 Pay Period End Date: 07/15/2016

Current Leave				YTD Leave				
	Earned	Taken	Adjust	Balance	Earned	Taken	Adjust	
Annual	7.36	0.00	0.00	285.98	39.72	56.00	0.00	
Sick	3.68	0.00	0.00	0.00	19.86	32.00	0.00	
Dep Sick		0.00				0.00		
Comp	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

## VIEW ABSENCE BALANCES AND FORECAST BALANCE

Self Service>Time Reporting>View Time>Absence Balances

Favorites Main Menu > Self Service > Time Reporting > View Time > Absence Balances

### View Absence Balances

Shelby Smith

View current absence entitlement balances. Current balances do not reflect absence requests that have not been processed by payroll. For more details please contact your absence administrator.

Absence Entitlement Balances				
Entitlement Name	Balance as of 07/15/2016	From	To	Accrual Period
Sick Entitlement	1323.86 Hours	01/01/2016	12/31/2016	Year to Date
Annual Entitlement	285.97 Hours	01/01/2016	12/31/2016	Year to Date

Go To [Forecast Balance](#)

To view what your balance will be in the future, click on the hyperlink Forecast Balance. Enter in the date you want to forecast for, and Absence Name; once this is entered the “Forecast Balance” button will appear. Click the “Forecast Balance” button

The screenshot shows a web browser window with the breadcrumb trail: Favorites > Main Menu > Self Service > Time Reporting > View Time > Absence Balances. The page title is 'View Absence Balances'. Below this is a section titled 'Forecast Balance' for user 'Shelby Smith'. A instruction reads: 'Enter As of Date and Absence Name. Then select the Forecast Balance button.' The form contains the following fields: 'As of Date' with a date input field set to '12/31/2016' and a calendar icon; '\*Absence Name' with a dropdown menu currently showing 'Annual Leave'; and 'Current Balance :285.97 Hours\*\*'. A 'Forecast Balance' button is located below the form, with a red arrow pointing to it. Below the form is a link 'Return to View Absence Balances'. At the bottom, there are two footnotes: '\* Required Field' and '\*\*Disclaimer The current balance does not reflect absences that have not been processed.'

Once the forecast button has been clicked, the system should advise you that it has been successful in calculating the forecasted balance and shows you the results of its calculation.

This will include all Leave that has been approved.

# Absence Request Scenarios

For other types of leave requests, the process is generally the same; only the data filled out on the Absence Request page will vary. Examples are included below.

## REQUEST SINGLE DAY ABSENCE (partial day)

Self Service > Time Reporting > Report Time > Absence Request

**Request Absence**

Shelby Smith  
Network Engineer  
Enter Start Date and Absence Name. Then complete the rest of the required fields before submitting or save for later your request.

**Absence Detail**

\*Start Date : 08/29/2016  
End Date : 08/29/2016  
\*Absence Name : Sick Leave  
Partial Days : Start Day Only  
Start Day Hours : 2.00  
Duration : 2.00 Hours  
Current Balance : 1323.86 Hours\*\*  
Calculate Duration

**Additional Information**

Start Time: 8:00am End Time: 10:00am

**Comments**

Requestor Comments : Dr Appt

Go To [View Absence Request History](#) [View Absence Balances](#)

Submit Save for Later

\* Required Field  
\*\*Disclaimer The current balance does not reflect absences that have not been processed.

To take just a few hours, choose the appropriate value from the drop down menu for the field “**Partial Days.**” This will cause appropriate fields to open underneath into which time can be entered.

The **Additional Information box is optional** – enter hours of the day is requested to do so by your supervisor. This is information only, it does not calculate any absence

**The Comments box is also optional.** Enter information here if requested to do so by your supervisor. Remember that this data is viewed by your supervisor, and people in the HR/Payroll office. Refrain from entering any personal medical data.

## REQUEST MULTIPLE DAY ABSENCE (full days)

Self Service > Time Reporting > Report Time > Absence Request

Request Absence

Shelby Smith  
Network Engineer  
Enter Start Date and Absence Name. Then complete the rest of the required fields before submitting or save for later your request.

**Absence Detail** ?

\*Start Date : 08/29/2016

End Date : 08/30/2016

\*Absence Name : Funeral Leave

Partial Days : None

Duration : 16.00 Hours

**Additional Information**

Start Time:  End Time:

**Comments**

Requestor Comments :

Go To [View Absence Request History](#) [View Absence Balances](#)

\* Required Field

Enter the appropriate date range

Choose the absence type

Choose the correct “**Partial Days**” selection

Click on the “**Calculate Duration**” button; the correct number of hours will be calculated.

As before, the Additional Information box and the Comments box are optional as designated by your supervisor.

## REQUEST SINGLE SHIFT ABSENCE CROSSING MIDNIGHT

Self Service > time reporting > report time > Absence Request

Example for someone working a 10:00 p.m. to 6:00 a.m. shift

Favorites | Main Menu > Self Service > Time Reporting > Report Time > Absence Request

### Request Absence

Shelby Smith  
Network Engineer  
Enter Start Date and Absence Name. Then complete the rest of the required fields before submitting or save for later your request.

**Absence Detail** ?

\*Start Date : 08/29/2016 [st]  
End Date : 08/29/2016 [st]  
\*Absence Name : Sick Leave Current Balance : 1323.86 Hours\*\*  
Partial Days : Start Day Only  
Start Day Hours : 2.00 ←  
Duration : 2.00 Hours

**Additional Information**

Start Time: End Time:

**Comments**

Requestor Comments :

Go To [View Absence Request History](#) [View Absence Balances](#)

\* Required Field  
\*\*Disclaimer The current balance does not reflect absences that have not been processed.

Favorites | Main Menu > Self Service > Time Reporting > Report Time > Absence Request

### Request Absence

Shelby Smith  
Network Engineer  
Enter Start Date and Absence Name. Then complete the rest of the required fields before submitting or save for later your request.

**Absence Detail** ?

\*Start Date : 08/30/2016 [st]  
End Date : 08/30/2016 [st]  
\*Absence Name : Sick Leave Current Balance : 1323.86 Hours\*\*  
Partial Days : Start Day Only  
Start Day Hours : 6.00 ←  
Duration : 6.00 Hours

**Additional Information**

Start Time: End Time:

**Comments**

Requestor Comments : Leave for end of shift

Go To [View Absence Request History](#) [View Absence Balances](#)

\* Required Field  
\*\*Disclaimer The current balance does not reflect absences that have not been processed.

# SUBMIT or EDIT A Saved Absence

Self Service>Time Reporting>View Time>Absence Request History

From : 05/31/2016 Through : 11/27/2016 Refresh

Absence Name	Status	Start Date	End Date	Edit
<a href="#">Annual Leave</a>	Approved	10/03/2016	10/03/2016	Edit
<a href="#">Sick Leave</a>	Approved	09/26/2016	09/26/2016	Edit
<a href="#">Annual Leave</a>	Approved	09/20/2016	09/20/2016	Edit
<a href="#">Annual Leave</a>	Saved	09/08/2016	09/08/2016	Edit
<a href="#">Annual Leave</a>	Approved	09/02/2016	09/02/2016	Edit
<a href="#">Annual Leave</a>	Saved	08/30/2016	08/30/2016	Edit
<a href="#">Annual Leave</a>	Approved	08/26/2016	08/26/2016	Edit
<a href="#">Annual Leave</a>	Approved	08/25/2016	08/25/2016	Edit
<a href="#">Annual Leave</a>	Saved	08/19/2016	08/19/2016	Edit
<a href="#">Annual Leave</a>	Approved	06/17/2016	06/27/2016	Edit

Choose the **“Edit”** button for the leave entry with a **“Saved”** status.

The saved page will open:

The data can be edited as needed.

Once finished, choose **“Submit.”**

# EDIT A PUSHED BACK ABSENCE

Self Service > Time Reporting > View Time > Absence Request History

The screenshot shows the 'Absence Request History' page for Shelby Smith, a Network Engineer. It includes a date range filter (From: 05/31/2016, Through: 11/27/2016) and a 'Refresh' button. Below is a table of absence requests with columns for Absence Name, Status, Start Date, End Date, and Edit. The entry for 'Annual Leave' on 09/01/2016 has a 'Push Back' status and an 'Edit' button, both of which are circled in red.

Absence Name	Status	Start Date	End Date	Edit
<a href="#">Annual Leave</a>	Approved	10/03/2016	10/03/2016	<a href="#">Edit</a>
<a href="#">Sick Leave</a>	Approved	09/26/2016	09/26/2016	<a href="#">Edit</a>
<a href="#">Annual Leave</a>	Approved	09/20/2016	09/20/2016	<a href="#">Edit</a>
<a href="#">Annual Leave</a>	Saved	09/08/2016	09/08/2016	<a href="#">Edit</a>
<a href="#">Annual Leave</a>	Approved	09/02/2016	09/02/2016	<a href="#">Edit</a>
<a href="#">Annual Leave</a>	Push Back	09/01/2016	09/01/2016	<a href="#">Edit</a>
<a href="#">Annual Leave</a>	Saved	08/30/2016	08/30/2016	<a href="#">Edit</a>
<a href="#">Annual Leave</a>	Approved	08/26/2016	08/26/2016	<a href="#">Edit</a>
<a href="#">Annual Leave</a>	Approved	08/25/2016	08/25/2016	<a href="#">Edit</a>
<a href="#">Annual Leave</a>	Saved	08/19/2016	08/19/2016	<a href="#">Edit</a>

Choose the “**Edit**” button for the leave entry with a “**Push Back**” status.

The saved page will open

The data can be edited as needed.

Add comments (optional)

Once finished, choose “Submit.”

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**The leave balances will no longer appear on your view paycheck in self-service. They can be viewed on-line on the Employee View Absence Balances via Self Service**

**Self Service>Benefits>Absence Balances**