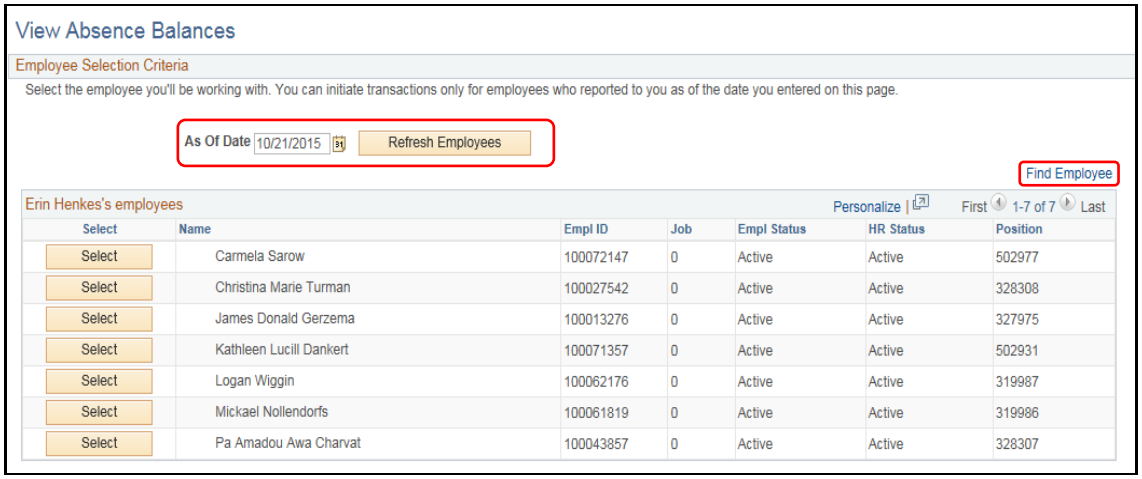
STAR PeopleSoft Job Aid: Supervisor Self Service Absence Management – General Reporting

This job aid provides an overview of reporting and reviewing absences within the Manager Self Service menu.

Audience: Supervisors

REVIEWING LEAVE BALANCES

This lesson provides instructions on how to locate and view the available time off balance within the Supervisor Self Service Reporting module of STAR PeopleSoft.

Step	Action
1.	To review leave balances, begin by navigating to the **Absence Balances** page. Main Menu > Manager Self Service > Time Management > View Time > Absence Balances
2.	Only your employees will be displayed. If your employees have changed since the **As Of Date** shown, change the date and click **Refresh Employees**. If your list of employees consists of more than one page, you may use the **Find Employee** link to locate the appropriate employee.  Click **Find Employee**.

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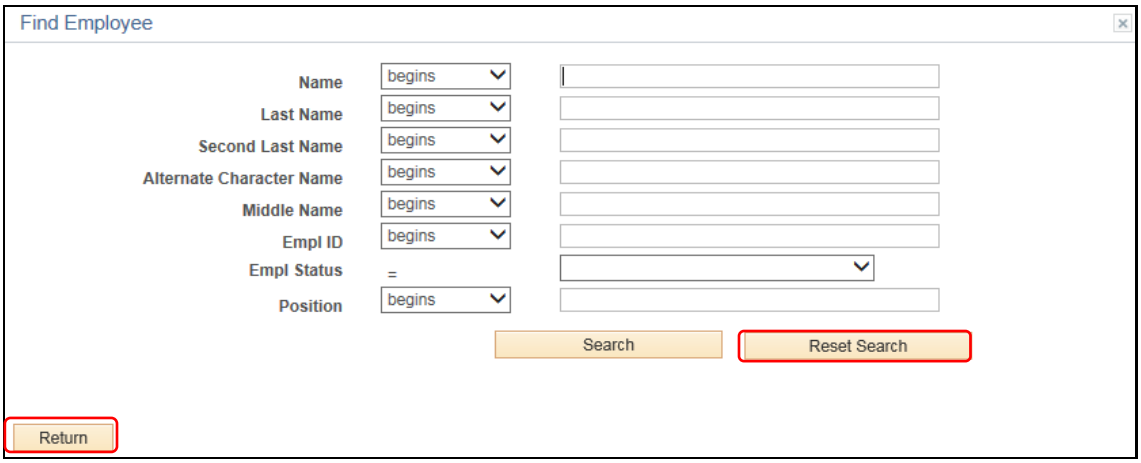
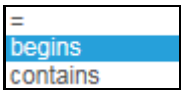
3. Search by the one of the following criteria:

- Name
- Last Name
- Second Last Name
- Alternate Character Name
- Middle Name
- Empl ID
- Empl Status
- Position

To clear search criteria and start over, click **Reset Search**.

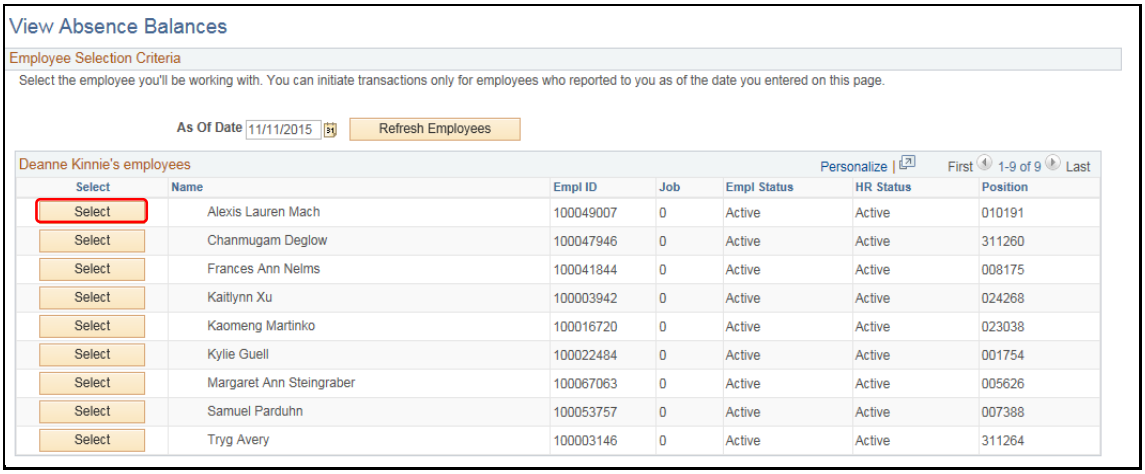


4. **Note:** For more search options click the dropdown list next to the search criteria.

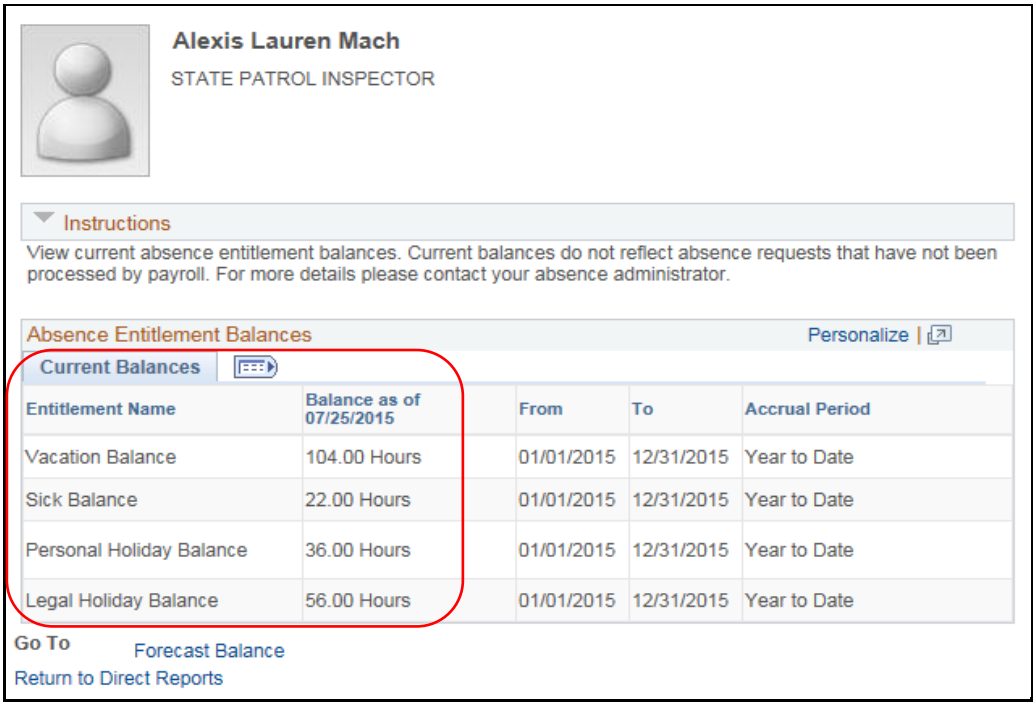


For the purpose of this exercise, click **Return**.

5. To view a particular employee's absence balance, click **Select** next to the employee's name.



Select	Name	Empl ID	Job	Empl Status	HR Status	Position
Select	Alexis Lauren Mach	100049007	0	Active	Active	010191
Select	Chanmugam Deglow	100047946	0	Active	Active	311260
Select	Frances Ann Nelms	100041844	0	Active	Active	008175
Select	Kaitlynn Xu	100003942	0	Active	Active	024268
Select	Kaomeng Martinko	100016720	0	Active	Active	023038
Select	Kylie Guell	100022484	0	Active	Active	001754
Select	Margaret Ann Steingraber	100067063	0	Active	Active	005626
Select	Samuel Parduhn	100053757	0	Active	Active	007388
Select	Tryg Avery	100003146	0	Active	Active	311264

6.	The balances for Alexis Lauren Mach are now displayed.  **Note:** The balances do not reflect absence requests that have not been processed by Payroll.
7.	The **View Available Balances** page diplays the remaining leave balances for the selected employee. The types of leave that are displayed will vary based on eligibility. The following leave types are the most common: • Vacation Hours • Sick Hours • Personal Holiday Hours • Legal Holiday Hours Any remaining carryover balances will be displayed seperately from the current year's balance.

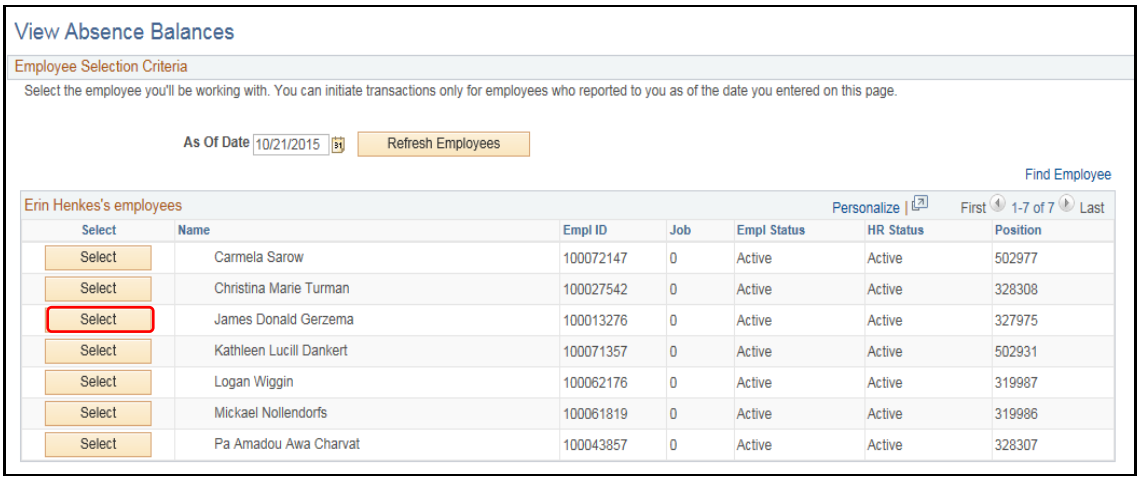
ENTERING AN ABSENCE REQUEST ON BEHALF OF AN EMPLOYEE

This lesson provides instructions on how to enter an absence request on behalf of another employee within the Supervisor Self Service Reporting module of STAR PeopleSoft.

Note: Employees are required to obtain approval for absences through their normal agency policy before entering the absence request into STAR PeopleSoft.

Key Points:

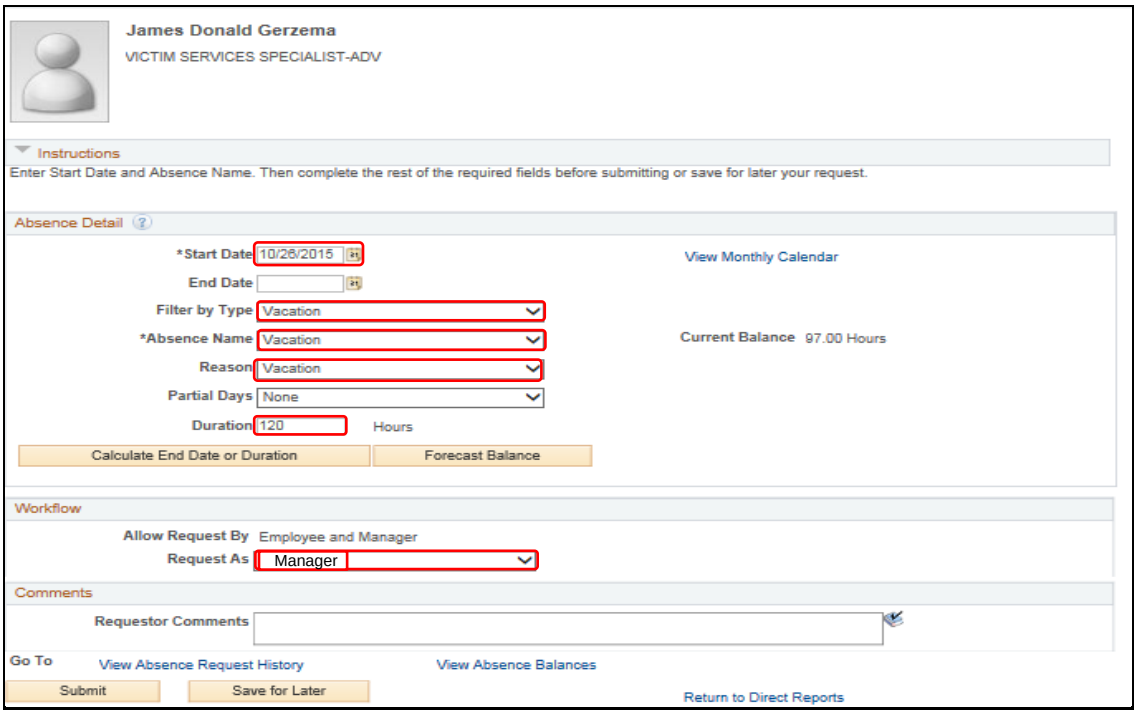
- All absences must be forecasted before they can be submitted.
- Any absence with a Forecast Error cannot be submitted.
- When entering FMLA, please see step 13 below and contact your payroll and benefits specialist for additional information.

Step	Action
1.	To report time on behalf of another employee, begin by navigating to the **Absence Request** page. Main Menu > Manager Self Service > Time Management > Report Time > Absence Request
2.	Only your employees will be displayed. If your employees have changed since the **As Of Date** shown, change the date and click **Refresh Employees**. If your list of employees consists of more than one page, you may use the **Find Employee** link to locate the appropriate employee. Click **Select** next to the employee you wish to request an absence for. 

3.

To enter an absence on behalf of an employee, take the following steps:

1. Select **Start Date**.
2. Select **End Date** or enter **Duration**. (For the purpose of this exercise, we will enter a portion of time in the **Duration** field.)
3. Select **Absence Name**. This can be done by selecting **Filter by Type** from the dropdown and then selecting an **Absence Name** from the dropdown or by selecting the **Absence Name** from the dropdown without filtering.
4. Select **Reason** from the dropdown. (Reason is required when entering an absence of Sick Leave; please refer to your agency policy for entering reasons for other absences.)
5. In the **Request As** dropdown list, select **Manager**.



Manager

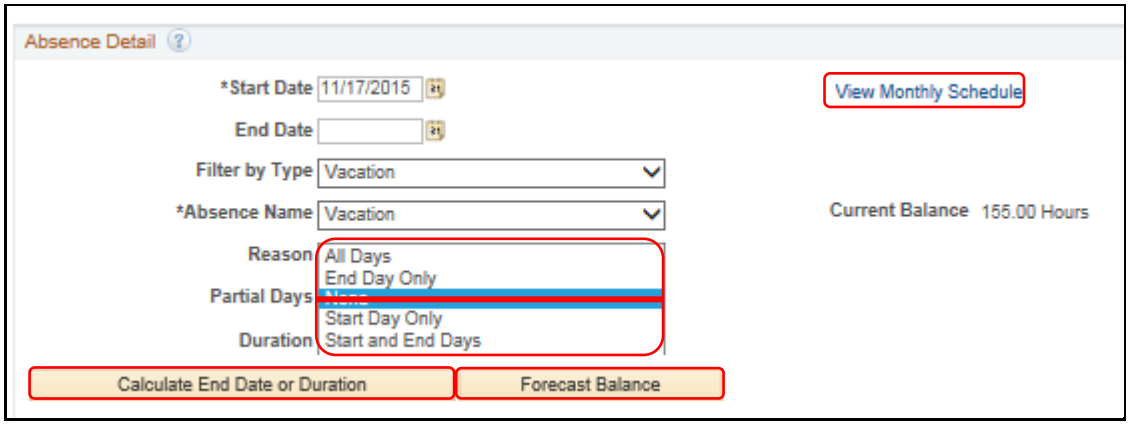
SELF SERVICE

4. Select **Partial Days** if the following instances apply (Reference the screenshot below on how to enter partial days):

- The absence is not a full day of leave.
- They are using more than one type of leave to cover the absence.

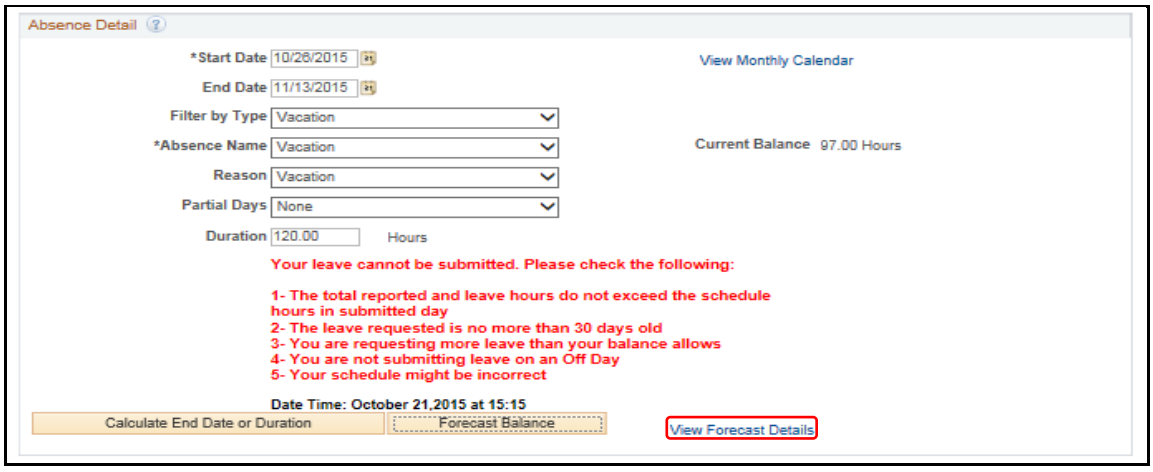
Note: When selecting partial days, choose the appropriate option from the **Partial Days** dropdown list.

For example, if you plan to take a partial day off (say 4 hours of vacation) on the start day only, select "**Start Day Only**." Another example would be if you are wanting to take say 4 hours of vacation each day from 12/21/15 through 12/23/15, you would select, "**All Days**." Then 4 hours of vacation would be taken on each of these three days and reflected in your leave balance. Therefore a total of 12 hours of vacation would be used between 12/21/15 through 12/23/15. The choice of **"None" would not be** selected because you are taking partial days. Click **Calculate End** or **Duration.** (For this example the **End Date** will be calculated since the **Duration** is set to 120 hours).



Click **Forecast Balance** (You must forecast balance before you submit the absence request).

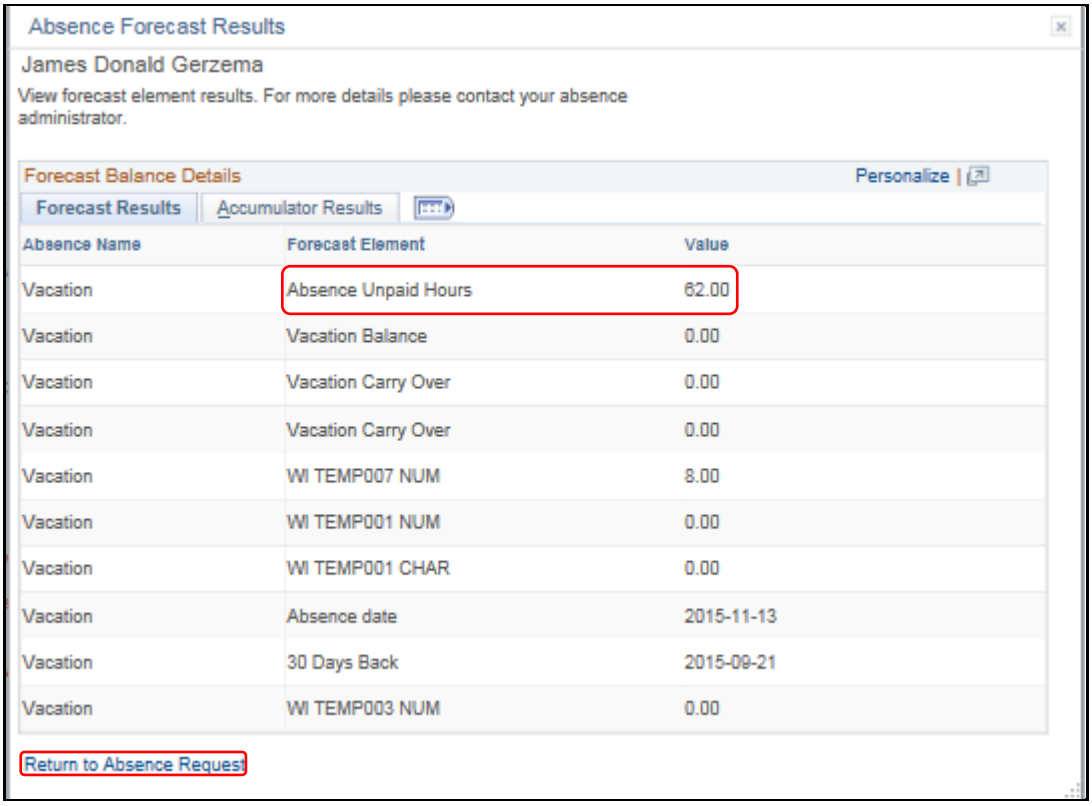
5. Click **View Forcast Details** to review why your leave cannot be submitted.



6.

Note: There is not enough balance to cover this leave; if processed, *62* hours would be Absence Unpaid Hours. In this example, the duration would need to be reduced to not exceed the balance available (shown above).

Click **Return to Absence Request**.



Absence Forecast Results

James Donald Gerzema

View forecast element results. For more details please contact your absence administrator.

Forecast Balance Details — Personalize

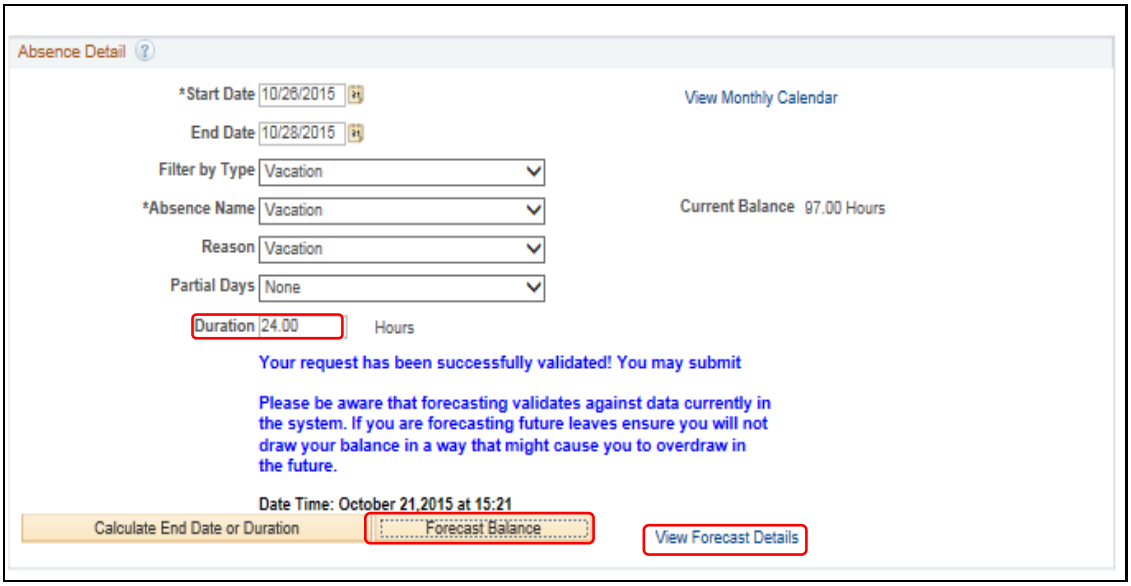
Forecast Results | Accumulator Results

Absence Name	Forecast Element	Value
Vacation	Absence Unpaid Hours	62.00
Vacation	Vacation Balance	0.00
Vacation	Vacation Carry Over	0.00
Vacation	Vacation Carry Over	0.00
Vacation	WI TEMP007 NUM	8.00
Vacation	WI TEMP001 NUM	0.00
Vacation	WI TEMP001 CHAR	0.00
Vacation	Absence date	2015-11-13
Vacation	30 Days Back	2015-09-21
Vacation	WI TEMP003 NUM	0.00

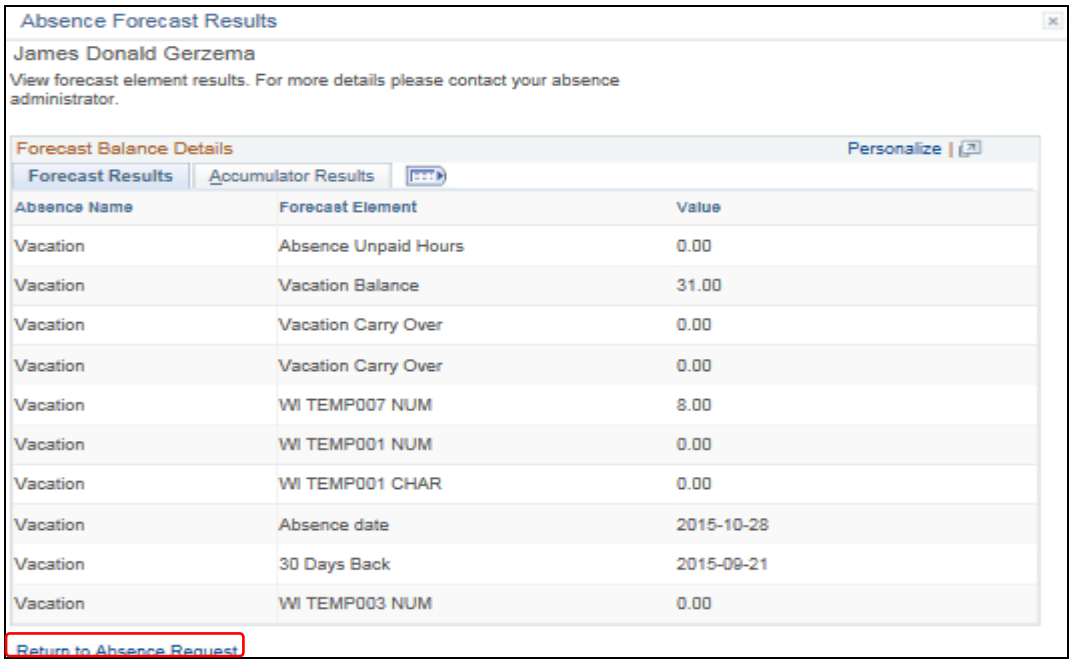
Return to Absence Request

7. Change the hours to an appropriate amount, below the **Current Balance** amount and click **Forecast Balance**.

Click **View Forecast Details**.

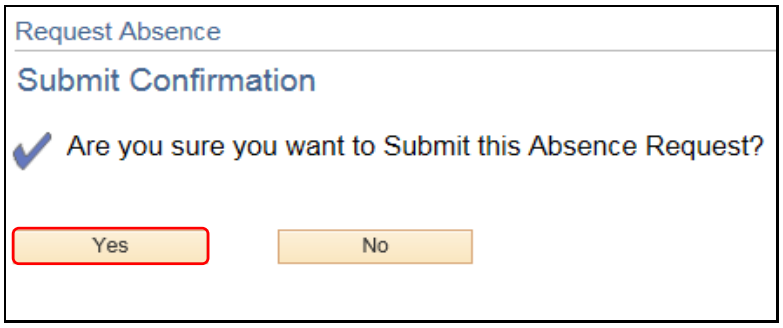
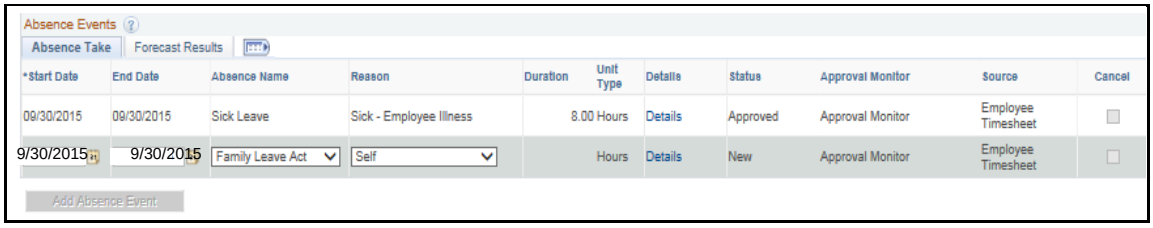


8. Click **Return to Absence Request**.



9. The **Request Absence** page also allows you to:

- View Absence Request History.
- View Absence Balances.

10.	Click **Submit**.
11.	Click **Yes.** 
12.	Click **OK**.
13.	**Note**: When taking FMLA, you must submit another type of leave (sick, vacation, leave without pay etc…) for the same corresponding dates/hours **prior** to submitting the FMLA take. 

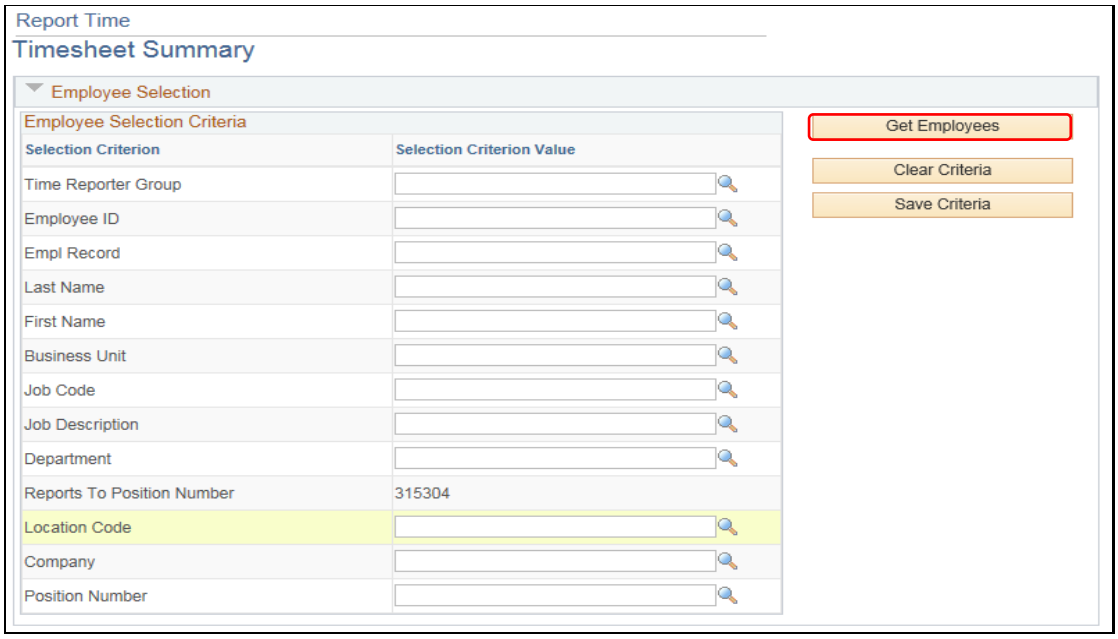
9/30/2015

9/30/2015

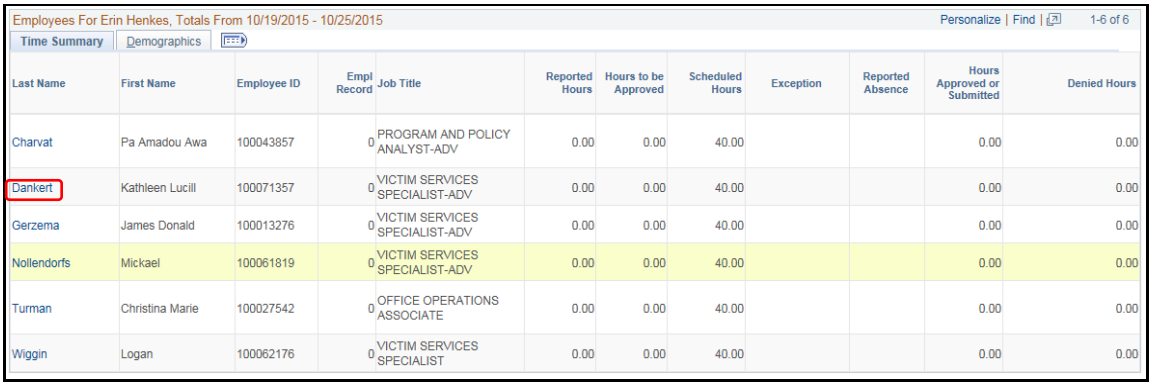
9/30/2015

ENTERING AN ABSENCE ADJUSTMENT ON BEHALF OF AN EMPLOYEE

This lesson provides instructions on how to adjust an absence request on behalf of an employee within the Supervisor Self Service Reporting module of STAR PeopleSoft.

Step	Action
1.	To enter an absence adjustment on behalf of an employee, start by navigating to the **Timesheet** page. Main Menu > Manager Self Service > Time Management > Report Time > Timesheet
2.	Click **Get Employees**. Only your employees will be displayed. (Scroll to the bottom of the page to view employees timesheets) 

3. Click the last name of the employee you wish to adjust time for.



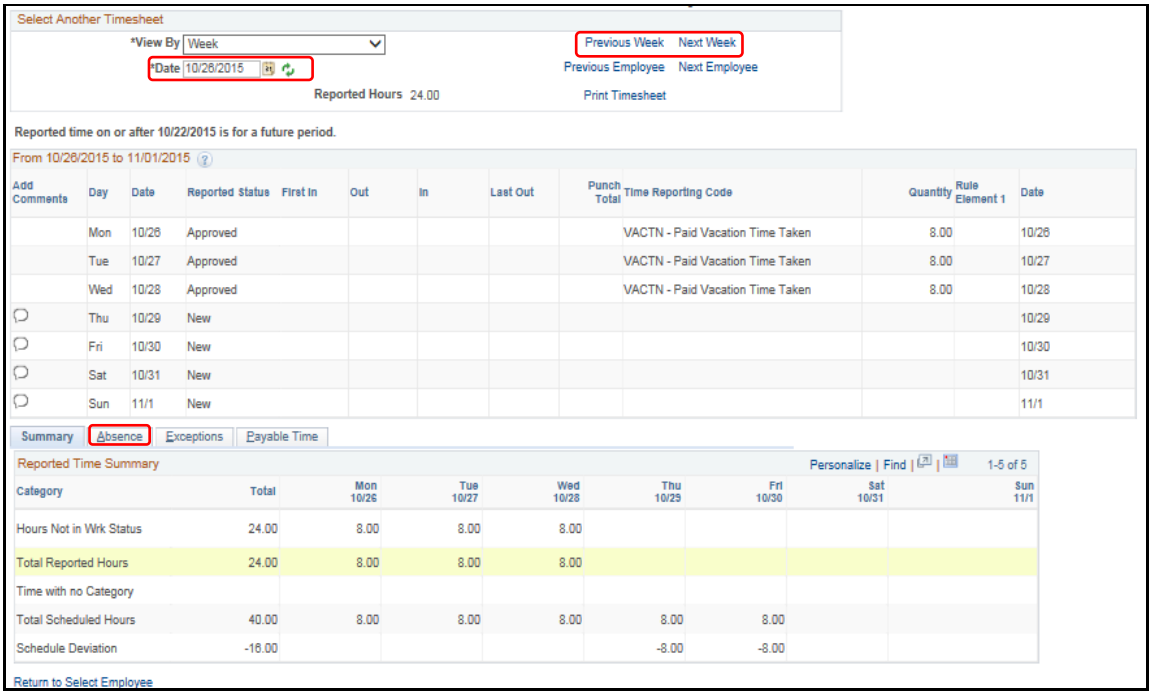
Employees For Erin Henkes, Totals From 10/19/2015 - 10/25/2015

Personalize | Find | 1-6 of 6

Time Summary | Demographics

Last Name	First Name	Employee ID	Empl Record	Job Title	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence	Hours Approved or Submitted	Denied Hours
Charvat	Pa Amadou Awa	100043857	0	PROGRAM AND POLICY ANALYST-ADV	0.00	0.00	40.00			0.00	0.00
Dankert	Kathleen Lucill	100071357	0	VICTIM SERVICES SPECIALIST-ADV	0.00	0.00	40.00			0.00	0.00
Gerzema	James Donald	100013276	0	VICTIM SERVICES SPECIALIST-ADV	0.00	0.00	40.00			0.00	0.00
Nollendorfs	Mickael	100061819	0	VICTIM SERVICES SPECIALIST-ADV	0.00	0.00	40.00			0.00	0.00
Turman	Christina Marie	100027542	0	OFFICE OPERATIONS ASSOCIATE	0.00	0.00	40.00			0.00	0.00
Wiggin	Logan	100062176	0	VICTIM SERVICES SPECIALIST	0.00	0.00	40.00			0.00	0.00

4. **Note**: The system will default to the current week upon opening the timesheet. Use the **Previous Week** and **Next Week** links to locate the appropriate timeframe.



Select Another Timesheet

*View By Week — Previous Week | Next Week

*Date 10/26/2015 — Previous Employee | Next Employee

Reported Hours 24.00 — Print Timesheet

Reported time on or after 10/22/2015 is for a future period.

From 10/26/2015 to 11/01/2015

Add Comments	Day	Date	Reported Status	First In	Out	In	Last Out	Punch Total	Time Reporting Code	Quantity	Rule Element 1	Date
	Mon	10/26	Approved						VACTN - Paid Vacation Time Taken	8.00		10/26
	Tue	10/27	Approved						VACTN - Paid Vacation Time Taken	8.00		10/27
	Wed	10/28	Approved						VACTN - Paid Vacation Time Taken	8.00		10/28
	Thu	10/29	New									10/29
	Fri	10/30	New									10/30
	Sat	10/31	New									10/31
	Sun	11/1	New									11/1

Summary | Absence | Exceptions | Payable Time

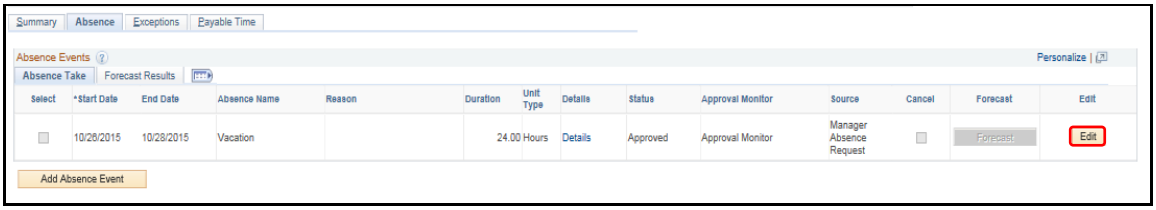
Reported Time Summary — Personalize | Find | 1-5 of 5

Category	Total	Mon 10/26	Tue 10/27	Wed 10/28	Thu 10/29	Fri 10/30	Sat 10/31	Sun 11/1
Hours Not in Wrk Status	24.00	8.00	8.00	8.00				
Total Reported Hours	24.00	8.00	8.00	8.00				
Time with no Category								
Total Scheduled Hours	40.00	8.00	8.00	8.00	8.00	8.00		
Schedule Deviation	-16.00				-8.00	-8.00		

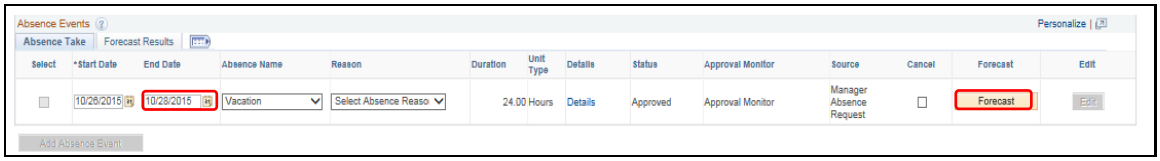
Return to Select Employee

Click the **Absence** tab.

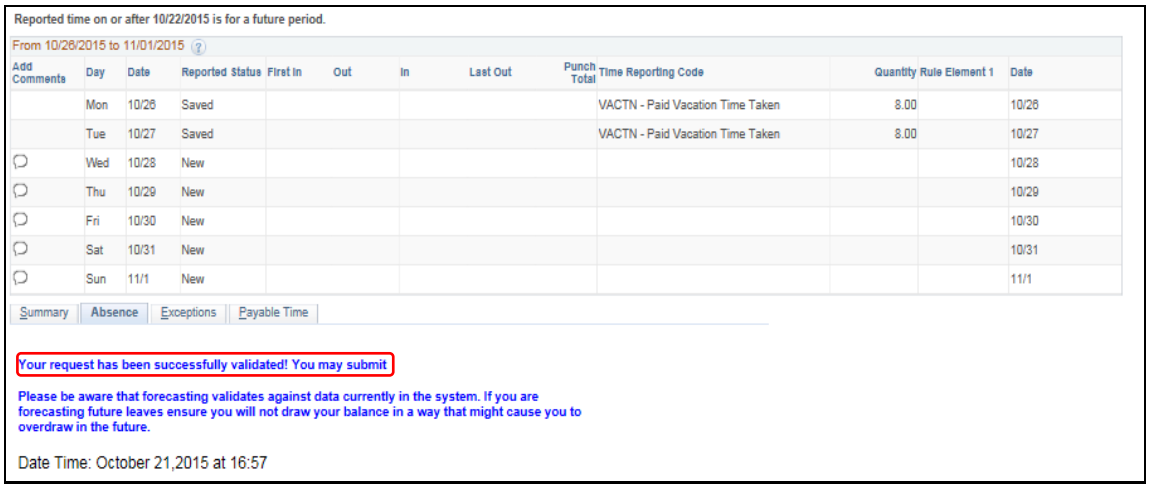
5.	The **Timesheet** page allows you to edit an existing absence request or add an additional absence event. For the purpose of this exercise, click **Edit**.

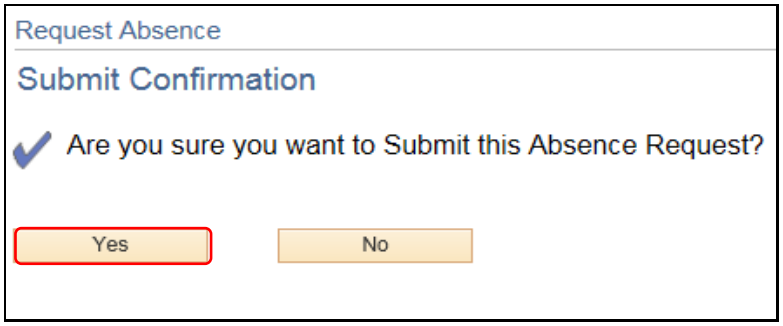


6.	Adjust the **End Date** to the appropriate date, then click **Forecast**.



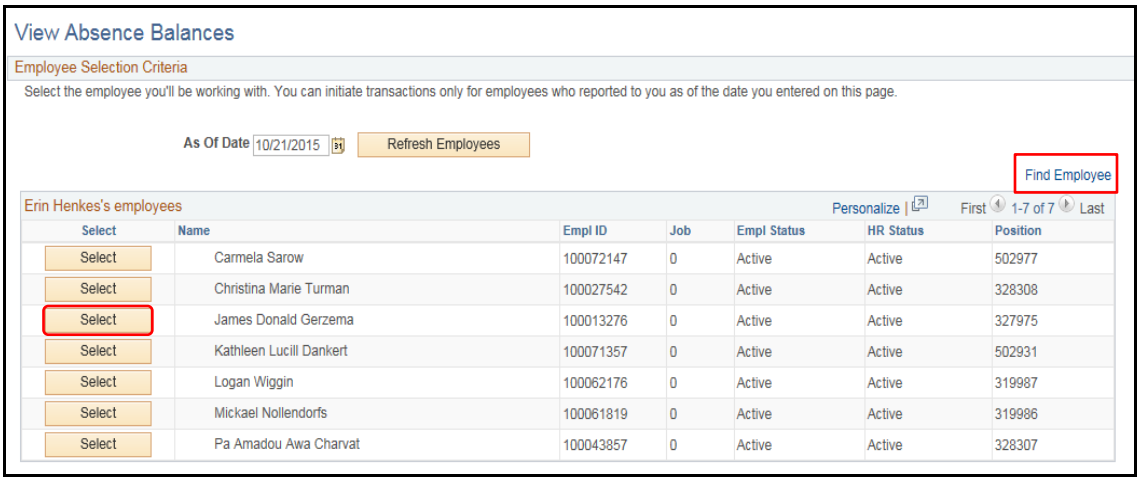
7.	**Note:** The request was successfully validated.

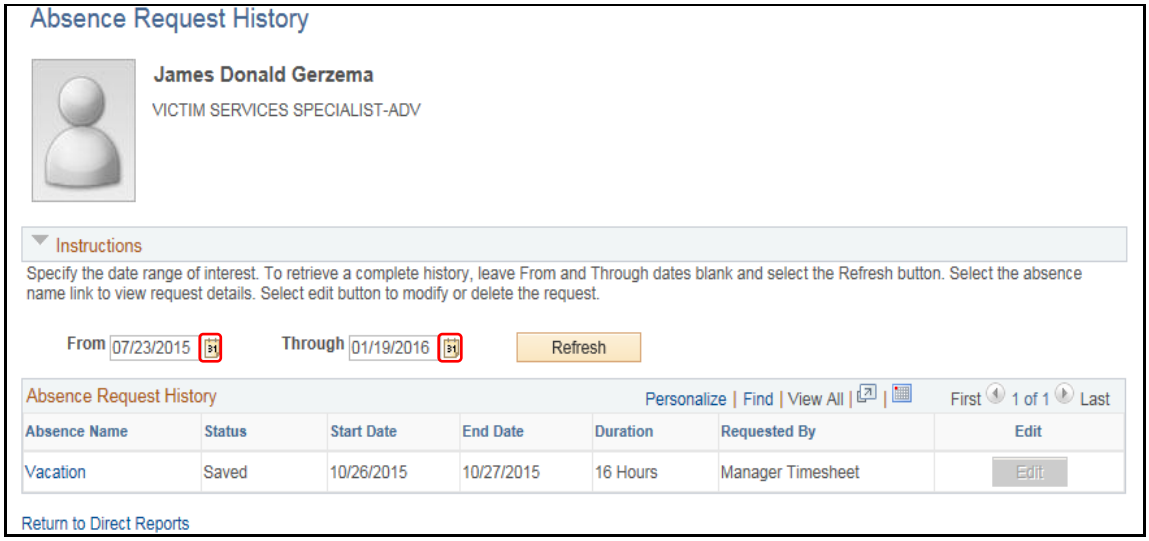


8.	Click **Submit.**
9.	Click **Yes.** 
10.	Click **OK**.

REVIEWING ABSENCE REQUEST HISTORY

This lesson provides instructions on how to review absence history of another employee within the Supervisor Self Service Reporting module of STAR PeopleSoft.

Step	Action
1.	**To review absence request history, begin by navigating to the Absence Request History page.** Main Menu > Manager Self Service > Time Management > View Time > Absence Request History
2.	Only your employees will be displayed. If your employees have changed since the **As Of Date** shown, change the date and click **Refresh Employees**. If your list of employees consists of **more than one page** you may use the **Find Employee** link to locate the appropriate employee. Click **Select** next to the employee you wish to view the absence request history for. 

3.	By default, the system will display a date range of 90 days prior and 90 days after the current date. If a different date range is needed, adjust dates accordingly by clicking the **Calendar** icons. 
4.	The **Absence Request History** page displays the following information regarding the employees absence request history: • Absence Name • Status • Start Date • End Date • Duration of the absence request • Who it was requested by

ADDITIONAL RESOURCES

If you have further questions about any of the topics presented in this Job Aid, use the following supplemental resources available at http://starconnection.wi.gov/Training/#Resources

User Productivity Kits (UPKs): STAR HCM UPK

Absence Management 9.2 > Absence Management

STAR Job Aids: Release 2 Training Materials

STAR Release 2 Training Library > HCM401: Self Service > Job Aids

- **Employee Reporting: Time and Labor – Elapsed Time**
- **Employee Reporting: Time and Labor – Punch Time**