State of North Dakota

PeopleSoft HCM 8.9
Absence Management

Agency Administrator’s Guide
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Absence Management Enrollment

New Hires, Rehires and Transfers (This Excludes Hourly and Temporary Employees)

Payroll Tab: To enroll an employee into Absence Management; select the value of “Absence Management”. This will open the section for “Absence Management System”. Then, enter the employee’s Pay Group (i.e., PG1, MJ1, etc.). The Eligibility Group will default to ND State for Classified State Employees; this will need to be changed if you do not fall into this group.

Benefits Program Participation: Review Page, check that Elig Fld 3: has AM populated.
After an employee is enrolled in Absence Management they will be eligible to use their first month of leave entitlement. When entering a leave request the system will forecast the first month’s entitlement and will allow the employee to submit leave requests for the amount of leave they are entitled to. For example, if an employee is hired on the 1st of the month they would be entitled to 8 hours of Annual Leave or Sick Leave. If they are hired during the middle of the month, they would be entitled to a pro-rated amount of Annual Leave or Sick Leave depending on the date of hire.

**NOTE**: For those employees that transfer into a Department or Agency that requires them to enroll into Absence Management, an “Adjustment” must be processed to populate their Annual and Sick Leave Balances within the Absence Management module (See Page 15 – Leave Adjustment Balances). In addition, for those employees who are “Rehired” and have their service years “Adjusted”, an adjustment must be processed to add their Sick Leave Balance to Absence Management (See Page 15 – Leave Adjustment Balances).
Approving an Absence

When an employee is absent from work at a normally scheduled work time, the employee (via Self Service) or Manager (via Manager Self Service) will record the Absence Take, the Begin and End dates, and other details that the State is tracking.

Absences can be “Approved” via the Absence Event Entry Page by the Administrator. By selecting the “Manager Approved” check box the absence reported will be processed. (This process should be used when only absolutely necessary.)

Navigate: Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Absence Event

- Enter the employee information (EMPLID) that you are requesting an absence for.
- Click SEARCH button and select the employee.
- The search will return all absences, regardless of approval status within the range of dates selected. You can change the range of dates.
To view details and approve an absence for processing, click the blue Details Hyperlink.

When leave is approved through the Absence Event Entry Page, by the Administrator, the following entry will show on the employee’s Absence Request History Page.
The following screen will appear. Click and/or flag the “Manager Approved” check box and click **OK**.
The status will then appear as **Approved** - Remember to click the **SAVE** button.
Entering an Absence

When an employee is absent from work for an extended period of time and the employee and/or manager are not able to enter the leave request via self-service, the absence can be entered by the Administrator through the Absence Event Entry Page.

- Payroll Administrators and Department Administrators use this Page to record Absence Events when Self Service cannot be used.

Navigate: Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Absence Event

- Enter the employee information (EMPLID) that you are requesting an absence for.
- Click SEARCH button and select the employee.
- The search will return all absences, regardless of approval status within the range of dates selected. You can change the range of dates.
To add an Absence Event complete the fields on this Page or simple add a new row by clicking the “+” Icon if there are no blank lines.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Absence Take Element</td>
<td>Enter and/or select the Element Name associated with this absence from the list of the Prompt (i.e., Sick, Vacation, etc.).</td>
</tr>
<tr>
<td>Begin Date</td>
<td>Enter the BEGIN DATE of the absence.</td>
</tr>
<tr>
<td>End Date</td>
<td>Enter the END DATE of the absence.</td>
</tr>
<tr>
<td>Partial Hours</td>
<td>For absences of less than a full day, enter the number of hours that the employee was absent.</td>
</tr>
<tr>
<td>Process Action</td>
<td>For a new absence event, the default is Normal. Select Void to void an absence that has already gone through the Take process. The event is not processed in subsequent runs. Instead, the Process Action is reset to Normal and the Voided check box is automatically selected during the next Take process.</td>
</tr>
<tr>
<td>Original Begin Date</td>
<td>Not applicable – this field will be populated by the system once you SAVE.</td>
</tr>
</tbody>
</table>
Viewing Absence Calculation Results

After the Calculate process is run by Central Payroll, you can view the results. To view absence calculations results go to:

**Navigate:** Global Payroll & Absence Mgmt > Absence and Payroll Processing > Review Absence/Payroll Info > Results by Calendar Group

- Select Results by Calendar Group and/or EMPLID.
- You will see a list of Calendar Group ID’s; select the desired Calendar Group ID.
To view the Accumulators calculation, click the Accumulators TAB and click “View All” to see all accumulators processed by Absence Management.
From the “Calendar Group Results” TAB, select “Absence Data” hyperlink to view the absences that have been processed.
➢ To view what will be sent to Payroll, select the “Generated Positive Input” hyperlink from the “Calendar Group Results” TAB.
Once on this Page, click the “Other Data” for details of how those Earnings Codes will be sent to payroll during the interface process to payroll.

Data will be sent to Payroll and loaded into the Paysheets.
**PeopleSoft HCM Absence Management**

**View an Employee’s Absence Balance**

Use the Balance Inquiry feature to view an employee’s current Entitlement Balance for a take.

**Navigate:** Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Review Absence Balances

- Enter the **EMPLID** desired.
- Click the **SEARCH** button.
NOTE: This page will display all the Leave Balances for an employee. If an employee is eligible for a particular Leave Type (i.e., Comp Time) and they have zero in their balance, that Leave Type will not be displayed.

- Select the TAB “Forecast Balance”.

<table>
<thead>
<tr>
<th>Accumulator Period</th>
<th>Entitlement Element</th>
<th>Entitlement Name</th>
<th>Amount From</th>
<th>Through</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year to Date</td>
<td>ANNL L Y STND</td>
<td>ANNL L Y STND_BAL</td>
<td>0.000000</td>
<td>05/01/2008-04/30/2009</td>
</tr>
<tr>
<td>Year to Date</td>
<td>FAM SICK L V</td>
<td>FAM SICK L V_BAL</td>
<td>16.000000</td>
<td>01/01/2008-12/31/2008</td>
</tr>
</tbody>
</table>
Enter the Absence Take Element (for example, Annual Leave Standard).

Enter the DATE desired (for example, 10/31/2008).

Click the “Forecast” button – the system will forecast the hours and return the information based on the Date entered in the “As Of Date” field.
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondary Element</td>
<td>Displays the name of the take element that the results pertain to in the Secondary Element field (i.e., Annual Leave).</td>
</tr>
<tr>
<td>Forecast Element</td>
<td>Displays the name of the element for which a value has been forecasted.</td>
</tr>
<tr>
<td>Type</td>
<td>The Absence Type for the Take element is displayed.</td>
</tr>
<tr>
<td>Numeric Value</td>
<td>Amount of hours accrued based on the “As Of Date” requested.</td>
</tr>
<tr>
<td>Character Value</td>
<td>The Character Values tab displays variables defined with character values (not used at this time).</td>
</tr>
<tr>
<td>Date Value</td>
<td>The Date Value tab displays variables defined with date values (not used at this time).</td>
</tr>
</tbody>
</table>
Leave Adjustment Balances

You can adjust or override an employee’s Entitlement Balance in several ways. The State will be using the following Pages to Add/Subtract hours to Leave Balances.

**Navigate:** Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences

This will list ALL calendars that are set up in Absence Management. It is very important that the correct Calendar Group is selected for your employee. Enter the EMPLID and the appropriate Pay Group. Then, select the Calendar in which the adjustments are to be made.
Select the entitlement element for which you want to enter an adjustment. The prompt table displays only frequency-based entitlement elements that are defined for positive input overrides on the Element Name Page (i.e., Annual Leave, Sick and Personal Sick Leave).

Displays the name of the element for which a value will be adjusted (i.e., Annual Leave Standard).

Enter the adjustment units. You can enter a positive or negative number. The amount is added to or subtracted from the beginning Entitlement Balance when you run the Entitlement process.

These dates determine in which segment the adjustment is made, if the calendar period is segmented (calendar segments not used by the State).

- If you leave the Begin Date field blank, the system assumes that the date is the same as the Begin Date on the Calendar - Definition Page. The system does not use the begin date for processing.
- If the End Date differs from the Calendar End Date, and the calendar period is segmented, the end date determines the segment or slice to which the adjustment is assigned.

Click SAVE.

NOTES:

- When you process the next Absence Process, the balances will be updated.
- An employee will NOT appear in the search until their first Absence Calculation is finalized.
- You cannot enter more than one adjustment for the same element.
Updating/Modifying Accumulators

You can adjust or override an employee’s Entitlement Balance in several ways. The State will be using the following Pages to adjust year-to-date balances.

**Navigate:** Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Accumulators

- Enter the desired EMPLID.
- Enter the appropriate Calendar Group ID.
- Enter the appropriate Calendar ID.
- Click the **SEARCH** button or select one of the values listed.
**Field Name** | **Description**
--- | ---
Accumulator | Select the accumulator to adjust. Once selected, the system displays the accumulator's description to the right of this field and populates the Instances group box with information from the result tables. If no results are returned, the accumulator has no recorded balance for the identified employee record and calendar.

From Date | The Begin Date for the accumulator period.

Through Date | The End Date for the accumulator period.
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Updating/Modifying Accumulators

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<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Key 1</td>
<td>Not used by the State.</td>
</tr>
<tr>
<td>User Key 2</td>
<td>Not used by the State.</td>
</tr>
<tr>
<td>User Key 3</td>
<td>Not used by the State.</td>
</tr>
<tr>
<td>User Key 4</td>
<td>Not used by the State.</td>
</tr>
<tr>
<td>User Key 5</td>
<td>Not used by the State.</td>
</tr>
<tr>
<td>User Key 6</td>
<td>Not used by the State.</td>
</tr>
<tr>
<td>Amount</td>
<td>Enter the adjustment amount, either positive or negative.</td>
</tr>
<tr>
<td>Reason</td>
<td>Enter the reason for the adjustment.</td>
</tr>
</tbody>
</table>

Once the accumulator to be adjusted has been entered (including the amount and reason) click the SAVE button.

NOTES:

- The balances will **NOT** show until the next Absence Calculation is processed and Finalized.
- An employee will **NOT** appear in the search until their first Absence Calculation is finalized.
- You can add new instances and adjust accumulators, but you cannot delete entered data. All adjustments remain in the system for an audit trail. To reverse a prior adjustment, enter a row with an offsetting or negative value.
**FMLA Entitlement**

When an employee is approved for FMLA, FMLA entitlement will need to be given to the employee in the Absence Management module before they can request FMLA leave types.

**Navigation:** Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Assign Entitlements and Takes.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Element Type</td>
<td>Select the value of “Absence Entitlement”</td>
</tr>
<tr>
<td>Element Name</td>
<td>Select the value of “FMLA”</td>
</tr>
<tr>
<td>Description</td>
<td>Family Medical Leave (system generated).</td>
</tr>
<tr>
<td>Apply</td>
<td>This will default to checked.</td>
</tr>
<tr>
<td>Begin Date</td>
<td>This should be the beginning of the Pay Period the employee is entitled to start using their FMLA entitlement.</td>
</tr>
<tr>
<td>End Date</td>
<td>This should be the end of the Pay Period that matches the Begin Date Pay Period. (See example above).</td>
</tr>
<tr>
<td>Unit Element Type</td>
<td>Select the value of “Numeric”</td>
</tr>
</tbody>
</table>
### Field Name | Description
---|---
Element Name - Unit | This field is left blank.
Entitlement Unit | Enter the number of hours that the employee is entitled to use for FMLA.
Frequency | Select the value of “Pay Period”.
Frequency ID | This field is left blank.
Generation Control Option | This field is left blank.

- Family Medical Leave requests are forecasted for the Calendar year. Agencies will need to monitor all Family Medical Leave requests for rolling back and rolling forward methods.
Holiday Reporting

When an employee works a Flex Schedule, the employee will need to monitor their schedule to make sure they adjust for the 8-hour Holiday. For example, if an employee works Monday thru Thursday (9-hours a day) and on Fridays (4-hours a day) and there is a Holiday on Thursday, the employee would need to take 1 hour annual leave on Thursday or work an additional hour during the week.

If an employee, with a Flex Schedule reports leave taken during a week that includes a Holiday, the employee will need to adjust their Leave Hours taken to include the 8-hour Holiday.
Family Sick Leave, Military Leave and Military Leave Mobilization

Family Sick Leave, Military Leave and Military Leave Mobilization entitlements are maintained on a Calendar year. Separate leave entries will need to be made when these leave types cross over a Calendar year. For example, when reporting leave from December 30th thru Jan 6th, one should submit a Leave Request for December 30 thru 31 and another Leave Request for January 2nd thru 6th. Leave should not be requested on January 1st, since this is a holiday.