

# State of Wisconsin Department of Administration

# Absence Entry By Agency Payroll Job Aid

Version 2.0

#### **Version History**

Version	Date	Editor	Description
1.0	03/2021	Brenda Williams	Original release
2.0	07/2021	Brenda Williams	Limit Use of Absence Events screen and Change in Cancel Absence Process

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Role: Agency Payroll Specialist or Absence Management Specialist

#### Resources:

Manager Self Service (MSS)
Employee Self Service (ESS)
ESS Absence Entry Quick Guide

#### **OVERVIEW**

- Entry of absence takes by agency payroll office (agency) or Central Payroll (CP) must be done through the Create and Maintain screen. We cannot make absence entries from the Enter Time tile (timesheet). Entry by agency or CP will not inhibit the supervisor or employee from cancelling the absence and entering a new one. This means if you have an employee that has been told to use a specific leave type and you want to make sure they do not change it; you will have to check on Tuesday after the timesheets are locked at noon.
- The employee can enter absence takes either through the Request Absence tile or the Enter Time tile (timesheet) and click on Request Absence link. We are encouraging employees to make the absence entries through the timesheet. If the employee needs to change their absence, they must cancel the absence take through the Cancel Absence tile and then the employee can submit a new absence.
- As of the 7/27/21 system change, prior to the lockdown period the employee can change an absence in ESS by:
  - Cancelling the absence entry in the Cancel Absences tile.
  - Making a new absence entry in the Request Absence tile or timesheet.
- As of the7/27/21 system change, prior to the lockdown period the supervisor can update their employees'
  absences in MSS under Team Time > Request Absence tile or Cancel Absence tiles. To change an absence
  for an employee the manager must:
  - Cancel the absence take through the Cancel Absence tile.
  - Make a new absence entry through the Request Absence tile.
- Employees' entry requirements in certain situations:
  - Reason is required when using Sick or FMLA absence names. If entering a FMLA absence, the employee must first submit the corresponding leave absence, then submit the FMLA entry.
  - o If the employee has a 24/7 work schedule, if the employee is entering an absence, they must ALWAYS enter the number of hours in the Duration field on the Partial Days pop-up.

- If the employee has a 24/7 or Sunday Saturday 8 Flex schedule and entering more than 8 hours of work and leave on a single day, they must enter the leave first and have it in approved status, then enter their work hours.
  - The absence will show ineligible but in approved status. You need to verify that it is appropriate for the employee to be reporting the absence take. If appropriate, and there is sufficient leave balance, the absence take will process and be distributed/paid on the paycheck even with the ineligible status.
  - Normally, the only time an ineligible absence will not be distributed/paid is if there is not sufficient leave balance to cover the take. In that situation you want to reduce the number of hours to match the balance and enter a second leave type for the remaining hours.

#### • What causes Saved absences:

The employee or supervisor cannot cause a Saved absence on the Request Absence screen. They must click the Forecast Balance button then click the Submit button on the ESS and MSS tiles. If they leave the Request Absence screen without hitting the Submit button, the absence is lost.

- The system can cause a Saved/Incomplete absence when there is a low memory situation. CP will fix this issue.
- A Saved absence can also be caused by the agency or CP when entering or adjusting an absence on the Create and Maintain screen if you Forecast but forget to Submit the absence.

#### How to fix Saved absences:

- Very few saved/incomplete absences are being created by the low memory situation described above in the first bullet. CP is monitoring daily for absences in Saved status and will correct them from the Absence Event screen. (These saved/incomplete absences are not on the Create and Maintain screen.) We will send a list of corrected absences to the agencies.
- Saved events created by the agency on the Create and Maintain screen as described above in the second bullet can be identified by the agency using the WI\_ABS\_SAVED\_ABSENCE query. The agency can fix this saved absence issue on the Create and Maintain screen by selecting the absence, forecasting and submitting the absence.
- Tuesday of processing week, CP will identify any remaining Saved events and send a list to the agencies to fix before the final absence calc at 5:00 PM.

#### What can cause forecasting issues:

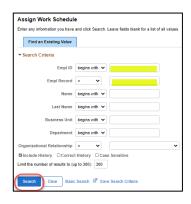
- o Initially, calendars are only entered through the end of the current payroll year (the last pay period of the year). In October, the next year's calendars are entered. If an employee submits an absence for a calendar not yet created, the system cannot forecast, and it will affect forecasting for any absences entered later.
  - To correct, delete the future absences, and reforecast the remaining absences.
- We believe we have resolved the Fiscal Year forecasting issue with the change we made in processing the split fiscal year pay period 2021B14/14A. We are not expecting this error to occur. If it does, please let Central Payroll know.

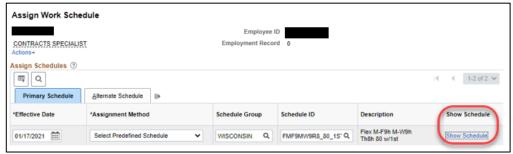
#### • Employee Work Schedule:

o Navigate to the Assign Work Schedule screen.



o Enter the Empl Id and Empl Rcd, click on the Search button.





- The employee's work schedule determines what days and number of hours they are eligible to use for an absence.
- o Apply leave equivalent to their work schedule for each day.
- o If their absence hours are less than their work schedule, you need to submit their absence using a partial day.

#### • Employee and Supervisor Locked Period

Timesheets will be locked at noon on Tuesday of processing week for employees and supervisors. We are directing employees in the ESS Job Aids to make their entries by 2:00 PM on Monday to match their timesheet entry deadlines.

Once Absence is finalized Tuesday night of processing week, the employee and supervisor will no longer be able to change these absences that have now been "finalized".

- The employee and supervisor will be able to enter new absence requests or cancel/re-enter for <u>unfinalized</u> absences:
  - o Employees have 14 days or 1 pay period prior.
  - Supervisors have 45 days or 3 pay periods prior.
- Any changes to <u>finalized</u> absences will have to be entered by the agency through the Create and Maintain screen.
- Once the period is locked down, all new and changes to absences will have to be entered by the agency through the Create and Maintain screen.

#### Agency and CP Locked Period

Agency payroll can adjust absences for current calendar year plus 1 year back. The absence periods are locked the end of the last pay period of the calendar year. In 2021, you can adjust 2021 and 2020 absences, with the lock starting with PP2020B01, 12/22/2019 (or prior).

No absence prior to this date (including FMLA entitlements) should be added, changed or deleted, except for termination leave balance clean-up. If you need to adjust an absence or leave balances that occurs in the locked period, please submit a STAR ticket to have the Absence period reopened, so your agency can enter the absence adjustment.

## Review and Enter Absences through the Create and Maintain screen

#### STEP 1: Navigate to the Create and Maintain Absence Request screen.



STEP 2: Click the to expand the Search section.



#### STEP 3: Search for absences

- 1. **Work Flow Status** field: Leave blank. To see only a specific leave status (I.e., Saved), select from the drop-down list
- 2. **From Date** and **Through Date** fields: Enter the desired period. I.e., pay period 2021B03 is 01/17/2021 to 01/30/2021.

Note: Blocks of leave that begin before the From Date or end after the Through Date will show in the results, but you will not be able to edit them. To edit leave on this page, the entire block of leave must fall within the date range chosen. If it does not, you will get this error.

If this happens you will have to change the dates at the top of the screen and start over. You will have to search again, and re-enter all changes you made.



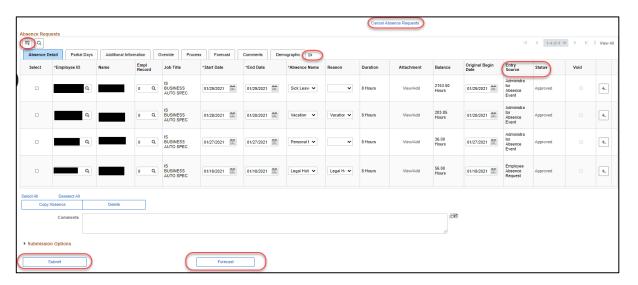
- 3. **Employee ID** field: Enter the employee's number.
- 4. **Employee Record** field: Defaults to 0. If anything, other than 0, you will have to enter.
- Absence Name field: Allows you to select a specific absence name.
   If you wish to drill to department and regional levels, you can use the **Department** field and **Pay Group** field.
- 6. Click the Search button.



#### STEP 4: Review absences

The employee's absences entered for the search parameters will display below the Absence Requests section.

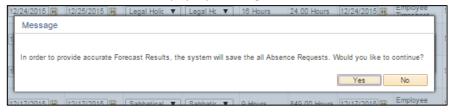
- To expand and see all the information from the various tabs, click on the button. Otherwise, simply click on the various tabs for specific data you are looking for.
- To export to an Excel worksheet, click on the button.
- Click on the employee name to see the Request History. This is not always accurate but can be useful to determine when an absence was entered, who entered it and if someone else has touched it.
- On the Absence Detail tab, the Entry Source column indicates where the entry was made: Absence Event, Absence Request, Timesheet...
- On the Absence Detail tab, the Status column indicates if approved, saved, denied, canceled, ...
- The Partial Days tab allows you to enter less than the full duration for the day.
- The Process tab indicates when last updated, process date and first process date.
- The Forecast tab displays the Forecast Value: Eligible or Not Eligible
- The Demographic tab displays the Department ID.



#### **OPTION 1: Submit Saved absences**



- See **Status column** to verify that the absence is in Saved status, check the **Select column**.
- Click the Forecast button.
- Click the **Yes** button on the pop-up message.



- If errors, make necessary fixes to the employee. I.e., a begin date prior to the original begin date.
  - o If this occurs, update the Original Begin Date field with the Start Date of the absence.



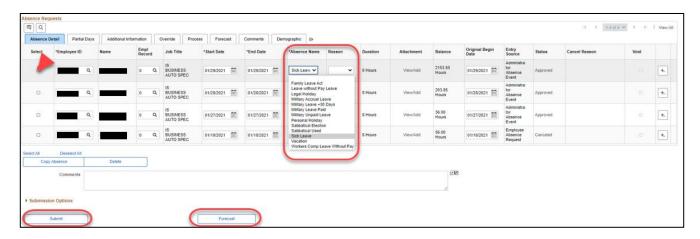
Another common error is the above mentioned error for blocks of leave indicating date range must be within the From Date and Through Date at top of screen.

 If this occurs, you will have to change the dates at the top of the screen and start over. You will have to search again, and re-enter all changes you made.



- The **Status column** is indicating Saved. From the **Select column**, check the absence(s) again.
- Click the Submit button.
- Confirm the following:
  - The **Status column** changed to Approved.
  - Click **Forecast column** to confirm forecast status shows as Eligible.

#### **OPTION 2: Changing the Absence Name**

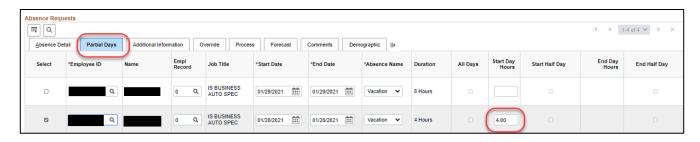


- From the **Select column**, check which absence(s) you wish to change.
- Click on the **Absence Name** field: Select the absence name that is appropriate from the drop-down list.
  - The **Reason** field is required for Sick and FMLA. Optional for other absence names.
- Click the Forecast button.
- Click the **Yes** button on the pop-up message.
- If the **Status column** is indicating Saved, from the **Select column**, check the absence(s) again.
  - Click the Forecast button.
  - Click the Yes button on the pop-up message.
  - o Click the **Submit** button.
- Confirm the following:
  - The **Status column** changed to Approved.
  - o Click **Forecast column** to confirm forecast status shows as Eligible.



• The Absence Name is now Vacation, and it is in approved status.

#### **OPTION 3: Changing the Duration**



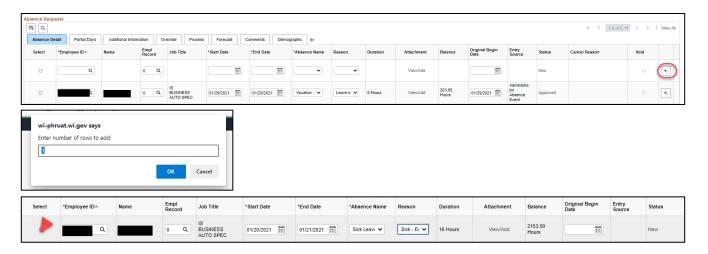


- From the **Select column,** check which absence(s) you wish to change.
- Select the Partial Days tab.
- Click on the **Start Day Hours** field and enter the number of hours.
  - o If absence spans multiple days, you need to check the box for "all days". Or if only the end date is shorter, use the End Day Hours instead of Start Day Hours.
- Click the Forecast button.
- Click the **Yes** button on the pop-up message.
- Click on the Absence Detail tab.
- Click on the **Submit** button.



• The Absence Duration is now showing 4.0 hours and it is in approved status.

#### **OPTION 4: Adding a new absence**



- Click the button to add a new row. Click the OK button on the pop-up message.
- Add the data to **Employee ID** field and **Empl Record** field.
- Add absence date to the **Start Date** field and **End Date** field.
  - o If just 1 day, the Begin and End Dates will be the same.
  - o If multiple days and using the same Absence Name you can enter as a block of leave.
  - The system will default to the scheduled hours. If taking only a Partial day, you will have to go
    to the Partial Days tab see above in Option 3 Changing Duration.
- Click on the Absence Name field: Select the absence name that is appropriate from the drop-down list.
  - The **Reason** field is required for Sick and FMLA. It is best practice but optional for other absence types.
- Check the box in the **Select column** for this absence.
- Click the **Forecast** button. Click the **Yes** button on the pop-up message.
- If errors, make necessary fixes to the employee. I.e., Blocks of leave must be within the From Date and Through Date at top of screen. If it does not, you will get this error.
  - If this happens you will have to change the dates at the top of the screen and start over. You
    will have to search again, and re-enter all changes you made.



The Status will be Saved. Check the Select column again.



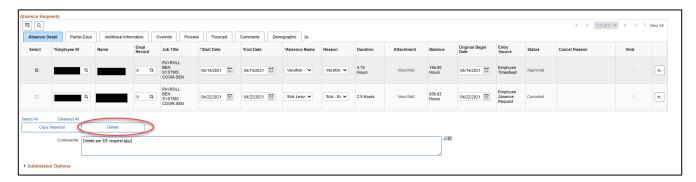
Click the Submit button.



• The new absence for 1/20 - 1/21 for 8 hours of sick leave both days are showing, and it is in approved status. Confirm forecast status is showing as Eligible.

#### **OPTION 5: Delete an absence**

- From the **Select column** check which absence(s) you wish to delete.
- Enter your comment.
- Click the **Delete** button. Click the **Yes** button on the pop-up message.



• The absence is no longer listed.



• The employee or manager can now enter in Self Service a new absence on this day, if necessary.

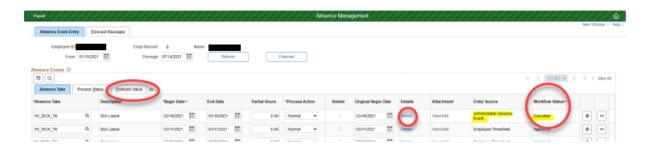
### Review through the Absence Event screen

With the PUM update, the Absence Event screen is not always updating the Workflow Status and is not populating all the various audit tables. It has been determined that absence updates (add, delete and change) MUST be made through the Create and Maintain screen, to ensure the Workflow Status and audit tables are updated correctly going forward. We plan to make the security role for agencies so that you will only have "view" access to the Absence Event screen.

Central Payroll will be monitoring this issue and will correct any absences accidently added, deleted, or changed on the Absence Event screen that are impacting the Workflow Status or audit tables.

#### Example of "Workflow Status" issue:

This is not happening in every situation. It occurs if the Manager Approved check box on the Details screen is checked. The employee canceled the 3/16/21 absence event. Agency resubmitted the canceled absence through the Absence Event screen. The employee was paid the 8 hours of leave and the leave balance was decreased. The Workflow Status remained as canceled. The absence is also missing from key audit tables.



STEP 1: Navigate to the Absence Event screen.



STEP 2: Search for absences.

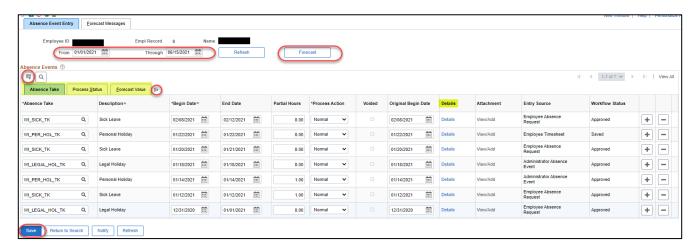
- 1. Add the data to **Employee ID** field.
- 2. **Employee Record** field: Is blank. If you leave it blank all Empl Records will be listed. Otherwise, you can enter the number.
- 3. Click the Search button.

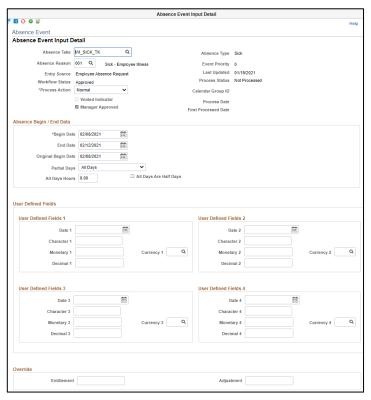


#### STEP 3: Review absences

The employee's absences entered for the search parameters will display below the Absence Events section.

- To expand and see all the information from the various tabs, click on the button. Otherwise, simply click on the various tabs for specific data you are looking for.
- To export to an Excel worksheet, click on the 
   button.
- Forecast button is at the upper middle and the Save button is lower left corner. The Save button is taking the place of the Submit button.
- On the Absence Take tab, Details column see below.
- The Process Status tab indicates Status, Calendar Group ID and Process Date.
- The Forecast Value tab indicates Forecast Value: Eligible or Not Eligible, Forecast Date Time and Forecast Details.





#### **STEP 4: View Forecast Value Detail**

