
Part IV: Time and Absence

Overview of Absence Requests

This section is for districts that are set up to have their employees enter their own absences.

Screens

There are three Absence screens you can use:

Screen	Enter an Absence Request	Edit a Saved Absence Request	Cancel an Absence Request	View Absence History	Forecast/ View Balances
1. Absence Request Screen	●				●
2. Absence Request History Screen		●	●	●	
3. Absence Balances Screen					●

FAQs

Q: How do I submit an absence request?

A: For full directions with screenshots, see the directions that begin on p.58.

Q: How far into the future can I submit an absence request?

A: You can submit absence requests through the end of this fiscal year.

Q: What drives the Absence Names (Bereavement, Jury Duty, Vacation, etc.) that I can select?

A: The pay group you are in, set up by your HR Department, drives the absence names you see on the screen.

Q: How does my manager know when to approve my absence request? How do I know when it was approved?

A: When you submit your absence request, an email message is sent to your manager to let him/her know that a request needs approval. When your manager takes action on your request—by either approving, denying, or pushing back—you will receive an email message.

Q: Can I view my up-to-date leave balances (not payroll by payroll)?

A: Yes. The current balance is as of last payroll. The current balances do not reflect absence requests not processed by payroll. If you want to see your up-to-date balance, forecast using today's date (or another future date).

Q: Will absence balances display on the PeopleSoft paystub?

A: Yes. You will see absence balances on the bottom-left of the paystub.

Q: How do you cancel an absence request?

A: Go to the **Absence Request History** screen. Click the **Cancel** button next to the request that you want to cancel. The request will open. Scroll to the bottom and click **Cancel Absence**.

Q: When does the system allow me to *edit* or *cancel* a request?

A: This grid shows the scenarios when you can and cannot edit or cancel a request.

Scenario	Can Edit	Can Cancel
Saved, future date	●	●
Saved, past date	●	●
Submitted but not approved yet, future date		●
Submitted but not approved yet, past date		
Submitted and approved, future date		●
Submitted and approved, past date		
Pushed back or denied, future date	●	●
Pushed back or denied, past date	●	●

- Edit: You can edit a request when it is saved (both future and past dates) or returned to you by your manager (pushed back or denied, both future and past dates).
- Cancel: You can cancel a request when it is saved (both future and past dates), submitted and not yet approved (future date), submitted and approved (future date), or returned to you by your manager (pushed back or denied, both future and past dates).

Q: If I cancel an absence request, when will the debited hours (those taken away because of the request) be returned to my balance?

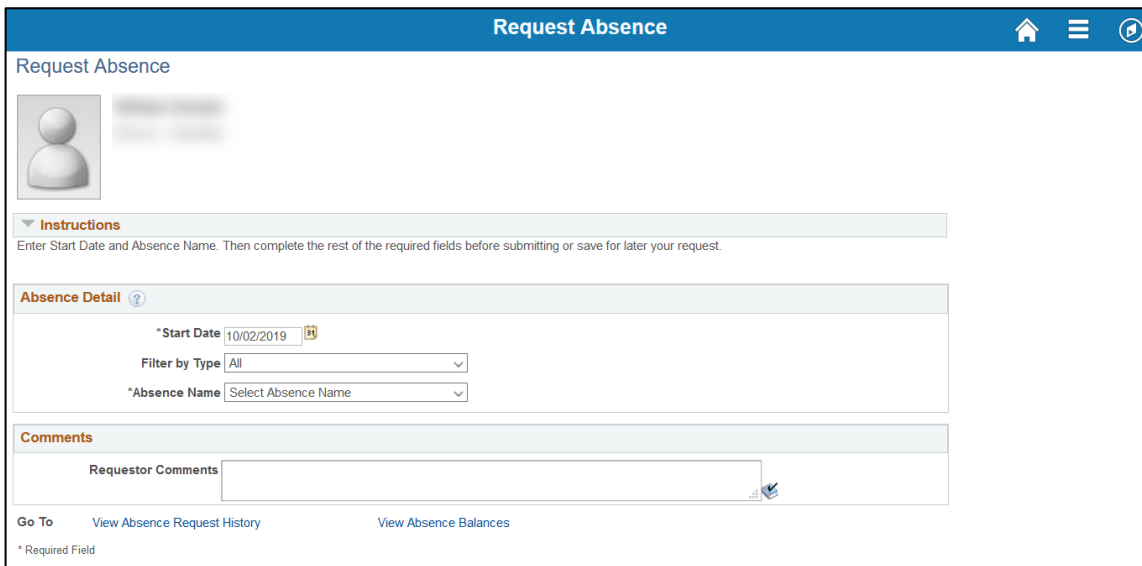
A: Your debited hours will be returned the next day. A nightly process needs to run to update the hours in your absence balances.

Entering Absence Request Screen

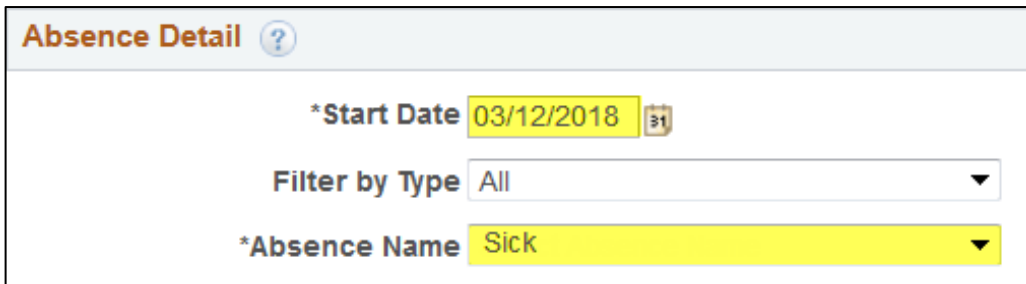
1. Click on the **Time and Absence** tile, then the **Absence Request** tile.



2. *Request Absence* screen opens. To enter your absence, **refer to How to Request Absence on p. Error! Bookmark not defined..**



3. Enter the **Start Date** and **Absence Name**. After you complete these two fields, additional fields will appear.



- **Start Date:** Enter the first day of the absence. Example: 03/12/2018.
- **Absence Name:** Select the type of absence. The options available for selection are tied to the way your position is set up in HR. Examples: Sick, Vacation, Personal Business, Personal Necessity, Jury Duty.

4. Enter the **End Date**. If necessary, enter **Reason** and **Partial Days**.

Absence Detail ?

*Start Date 03/12/2018

End Date 03/12/2018


Original Start Date

Filter by Type All

*Absence Name Sick

Reason Select Absence Reason

Partial Days None

Duration  Hours

Calculate End Date or Duration

Forecast Balance

Current Balance 244.00 Hours**

- **End Date:** Enter the last day of the absence. If this is one day only, this should be the same as the Start Date. Examples: 03/12/2018 - 03/12/2018 (one day), 03/12/2018 - 03/13/2018 (two days)
- **Reason:** If necessary and/or required by your district, select a Reason.
- **Partial Days:** Partial days are used when you are not taking a full day (like 2 hours or 4 hours, for example). See samples on p.14 for use of partial days.
- **Duration:** Don't enter the duration. This is automatically calculated in Step 5.
- **Current Balance:** Your current balance will be displayed on the right side of the screen. The current balances do not reflect absence requests not processed by payroll. This is why you forecast in Step 5.

5. Click **Calculate End Date or Duration** (orange button). This populates the **Duration** in hours.

NOTE: If the duration appears incorrect, contact HR to fix your job data record.

Duration 8.00 Hours

THE DURATION WILL CALCULATE

Calculate End Date or Duration

Forecast Balance

6. Click **Forecast Balance** (orange button). You should see a message that says, "Completed Successfully!" If not, you do not have enough of that absence type available. For details, click the **View Forecast Details** link on the right side of the screen.

Completed Successfully!
Date Time: March 12, 2018 at 10:41

SUCCESS = YOU HAVE ENOUGH OF
THAT ABSENCE TYPE AVAILABLE

Calculate End Date or Duration

Forecast Balance

View Forecast Details

7. If desired, enter comments. Click **Submit**.

Comments

Requestor Comments

[OPTIONAL]

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

Submit

Save for Later

NOTE: If you click **Save for Later** it doesn't go anywhere until you submit it; if you save you will need to edit and submit it from the Absence Request History screen.

8. A confirmation window will appear. Click **Yes**.

Request Absence

Submit Confirmation

✓ Are you sure you want to Submit this Absence Request?

Yes

No

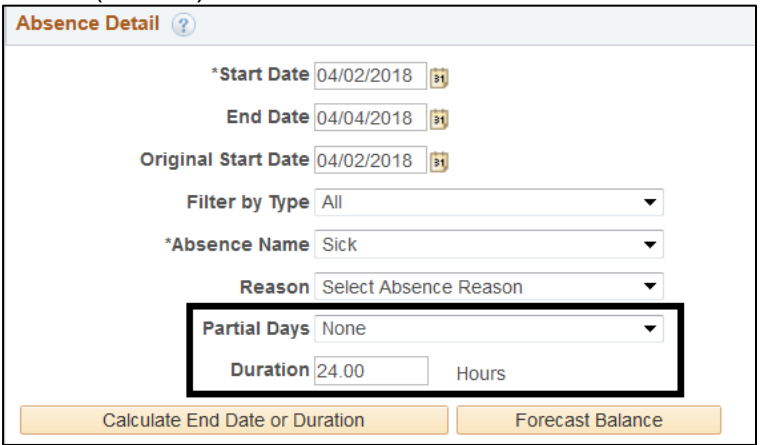
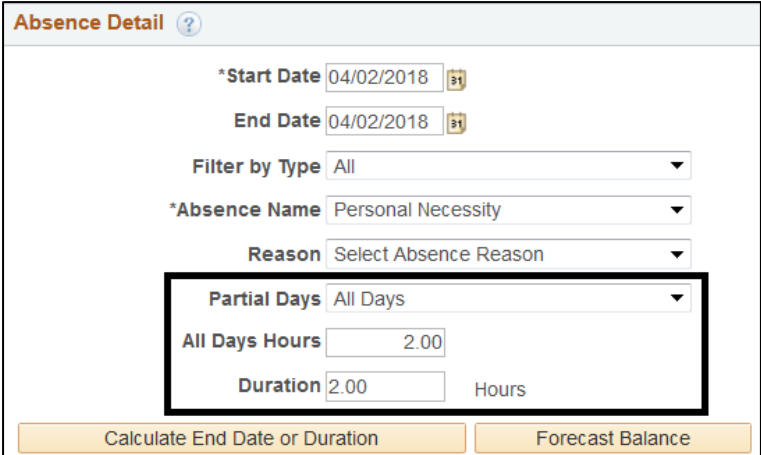
9. Click **OK**.







The absence request is now submitted, which sends an email message to your manager and also adds the request to his/her worklist. If desired, click **Home** to return to the home screen









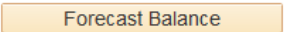

IMPORTANT! You cannot edit or cancel a submitted absence event until your manager takes action. You can only edit or cancel ones that are *saved*, *denied*, or *pushed back*. For directions, see p.**Error! Bookmark not defined.** (to edit) and p.84 (to cancel).

Partial Days

PeopleSoft allows you to enter absences requests in partial days. If you need to request a partial day(s) for an absence, you will use the **Partial Days** dropdown menu and the **Hours** field.

If you need to request...	Enter it like this...
<p>Full days off, no partials (MOST CIRCUMSTANCES)</p> <p><i>Example: Hank's regular work schedule is 8 hours per day. He is taking 3 full days (24 hours) of sick leave.</i></p>	<p>NONE (Default)</p>  <p>F. Partial Days = None (Default)</p> <p>G. Duration = Do nothing. It will be calculated by multiplying the employee's work schedule (8) x the number of days taken (3) = 24 hrs.</p>
<p>A few hours off during one work day (MANY CIRCUMSTANCES)</p> <p><i>Example: Hank's regular work schedule is 8 hours per day. He is taking 2 hours of personal necessity.</i></p>	<p>ALL DAYS (OR START DAY ONLY)</p>  <p>H. Partial Days = All Days (or you can select <i>Start Day Only</i> – when applied to one day, both do the same thing)</p> <p>I. All Days Hours = 2.0</p> <p>J. Duration = Do nothing. It will be calculated by taking the All Days Hours (2) x the number of days taken (1) = 2 hrs.</p>

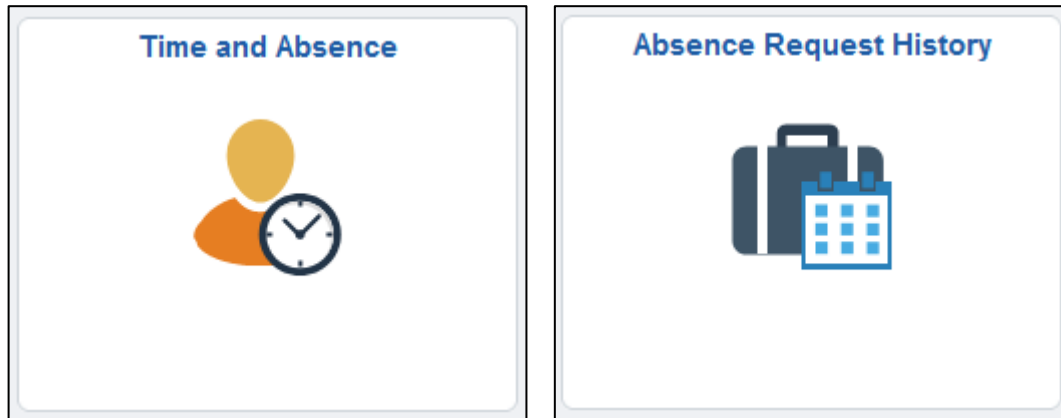
If you need to request...	Enter it like this...
<p>Consecutive half days off</p> <p><i>Example: Hank's regular work schedule is 8 hours per day. He is taking 3 half-days (12 hours) of vacation.</i></p>	<p>ALL DAYS</p> <div data-bbox="537 348 1312 863"> <p>Absence Detail ?</p> <p>*Start Date 04/02/2018 </p> <p>End Date 04/04/2018 </p> <p>Original Start Date 04/02/2018 </p> <p>Filter by Type All</p> <p>*Absence Name Vacation</p> <p>Reason Select Absence Reason</p> <div data-bbox="703 667 1247 810"> <p>Partial Days All Days</p> <p>All Days Hours 4.00</p> <p>Duration 12.00 Hours</p> </div> <p>Calculate End Date or Duration Forecast Balance</p> </div> <p>K. Partial Days = All Days</p> <p>L. All Days Hours = 4.0</p> <p>M. Duration = Do nothing. It will be calculated by taking the All Days Hours (4) x the number of days taken (3) = 12 hrs.</p>
<p>Partial day at end of leave</p> <p><i>Example: Hank's regular work schedule is 8 hours per day. He is taking 3 days of vacation. The first two days will be full days of vacation and the third will be a half-day (20 hours).</i></p>	<p>END DAY ONLY</p> <div data-bbox="537 1066 1312 1581"> <p>Absence Detail ?</p> <p>*Start Date 04/02/2018 </p> <p>End Date 04/04/2018 </p> <p>Original Start Date 04/02/2018 </p> <p>Filter by Type All</p> <p>*Absence Name Vacation</p> <p>Reason Select Absence Reason</p> <div data-bbox="703 1381 1247 1524"> <p>Partial Days End Day Only</p> <p>End Day Hours 4.00</p> <p>Duration 20.00 Hours</p> </div> <p>Calculate End Date or Duration Forecast Balance</p> </div> <p>N. Partial Days = End Day Only. The Partial Hours only apply to the End Date (within a range).</p> <p>O. End Day Hours = 4.0</p> <p>P. Duration: Do nothing. It will be calculated by taking his work schedule (8) x the number of full days taken (2) = 16 hrs. + the 4 hrs. taken on the half-day = 20 hrs.</p>

If you need to request...	Enter it like this...
<p>Partial day at beginning of leave</p> <p><i>Example: Hank's regular work schedule is 8 hours per day. He is taking 3 days of vacation. The first day will be a half-day of vacation and the second and third day will be full days (20 hours).</i></p>	<p>START DAY ONLY</p> <div data-bbox="535 352 1320 871"> <p>Absence Detail ?</p> <p>*Start Date 04/02/2018 </p> <p>End Date 04/04/2018 </p> <p>Original Start Date 04/02/2018 </p> <p>Filter by Type All </p> <p>*Absence Name Vacation </p> <p>Reason Select Absence Reason </p> <div data-bbox="690 667 1258 808"> <p>Partial Days Start Day Only </p> <p>Start Day Hours 4.00</p> <p>Duration 20.00 Hours</p> </div> <p>Calculate End Date or Duration  Forecast Balance </p> </div> <p>Q. Partial Days = Start Day Only. The Partial Hours only apply to the Start Date (within a range).</p> <p>R. Start Day Hours = 4.0</p> <p>S. Duration: Do nothing. It will be calculated by taking his work schedule (8) x the number of full days taken (2) = 16 hrs. + the 4 hrs. taken on the half-day = 20 hrs.</p>
<p>Partial day at beginning and end of leave</p> <p><i>Example: Hank's regular work schedule is 8 hours per day. He is taking 3 days of vacation. The first day will be a half-day, the second day will be a full day, and the last day will be a half-day (16 hours).</i></p>	<p>START AND END DAYS</p> <div data-bbox="535 1144 1193 1360"> <p>Partial Days Start and End Days </p> <p>Start Day Hours 4.00</p> <p>End Day Hours 4.00</p> <p>Duration 16.00 Hours</p> </div> <p>T. Partial Days = Start and End Days. The Partial Hours only apply to the Start Date and End Date (within a range).</p> <p>U. Start Day Hours = 4.0</p> <p>V. End Day Hours = 4.0</p> <p>W. Duration: Do nothing. It will be calculated by taking his work schedule (8) x the number of full days taken (1) = 8 hrs. + the hours taken on the 2 half-days (4 hrs.) + (4 hrs.) = 16 hrs.</p>

Edit a Saved, Denied, or Pushed Back Absence Request

To edit a saved, denied, or pushed back absence request, use the Absence Request History screen. Absences must be in the future in order to edit.

- Click on the **Time and Absence** tile then the **Absence Request History** tile.



- In the list of absences, look for the saved, denied, or pushed back absence request. If necessary, set the date range and click **Refresh**. Click **Edit**.

From

12/12/2017

31

Through

06/10/2018

31

Refresh

Absence Request History

Personalize | Find | View All |

First

1-7 of 7

Last

Absence Name	Status	Start Date	End Date	Duration	Requested By	Edit	Cancel
Personal Necessity	Cancel In Progress	03/26/2018	03/26/2018	4 Hours	Employee Absence Request	Edit	Cancel
Vacation	Approved	03/19/2018	03/21/2018	20 Hours	Employee Absence Request	Edit	Cancel
Personal Business	Saved	03/12/2018	03/12/2018	8 Hours	Employee Absence Request	Edit	Cancel
Personal Necessity	Denied	03/06/2018	03/06/2018	4 Hours	Employee Absence Request	Edit	Cancel
Vacation	Push Back	02/28/2018	03/05/2018	28 Hours	Employee Absence Request	Edit	Cancel
Jury Duty / Judicial	Submitted	02/27/2018	02/27/2018	8 Hours	Employee Absence Request	Edit	Cancel
Sick	Approved	02/26/2018	02/26/2018	8 Hours	Employee Absence Request	Edit	Cancel

- Make any necessary changes, then submit for approval.

NOTE ABOUT DENIED REQUESTS: If your manager denied the request, you may not resubmit it with the exact same date(s), absence name, or comments; you must change the request in some way.

Cancel an Absence Request

To cancel a future absence request, use the Absence Request History screen. You can do this even if your manager has already approved the request. Canceling a request will send a notification email message to your manager (the employee listed as your “Reports To” on your Job Data record). You can only cancel a future dated request. If they are in the past, you will need to contact your Payroll Department and have them edit.

1. Click on the **Time and Absence** tile then the **Absence Request History** tile.



2. In the list of absences, look for the absence request that you want to cancel. If necessary, set the date range and click **Refresh**. Click **Cancel**.

From

12/12/2017

31

Through

06/10/2018

31

Refresh

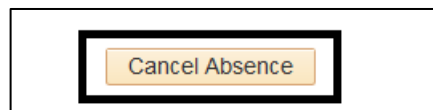
Absence Request History

Personalize
Find
View All

First
1-7 of 7
Last

Absence Name	Status	Start Date	End Date	Duration	Requested By	Edit	Cancel
Personal Necessity	Cancel In Progress	03/26/2018	03/26/2018	4 Hours	Employee Absence Request	Edit	Cancel
Vacation	Approved	03/19/2018	03/21/2018	20 Hours	Employee Absence Request	Edit	Cancel
Personal Business	Saved	03/12/2018	03/12/2018	8 Hours	Employee Absence Request	Edit	Cancel

3. Scroll to the bottom of the page. Click **Cancel Absence**.

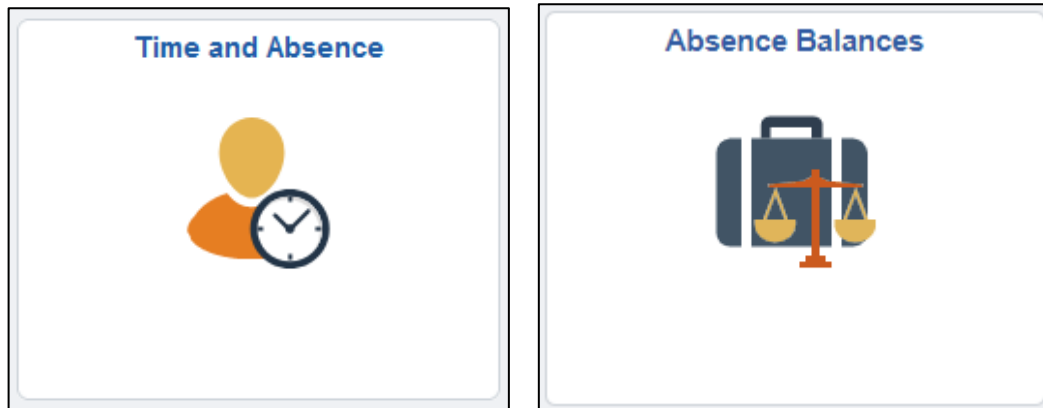


4. You should see a message that says, “Are you sure you want to Cancel this Absence Request?” Click **Yes**. This will cancel the absence request.
5. A confirmation message will appear that says, “The Absence Request was successfully canceled.” Click **OK**.
 - An email message regarding the cancelation will be sent to your manager.
 - You (employee) will receive an email notification indicating that the request was canceled. The exception is if your manager had denied or pushed back your request; in that case you will not receive an email notification when you cancel.
 - Your debited hours will be returned the next day. A nightly process needs to run to update the hours in your absence balances.

View Current Balances and Forecast

To view current balances and forecast, use the **Absence Balances** screen. For the Current Balance, PeopleSoft always looks at the finalized absence period. After payroll runs each month, you will see the balances from the previous finalized absence period.

- Click on the **Time and Absence** tile then the **Absence Request** History tile.



- This screen shows your current balances. The current balances do not reflect absence requests not processed by payroll. NOTE: When your district first starts using PeopleSoft and the first payroll has not yet run, no current balances exist; the screen will say "There are no current balances to display" and you will have 0.00 hours. You must forecast in Step 3 to see your balances.

Absence Entitlement Balances Personalize [icon]				
Current Balances [icon]				
Entitlement Name	Balance as of 01/31/2018	From	To	Accrual Period
Personal Business Ent Balance	64.00 Hours	07/01/2017	06/30/2018	Year to Date
Personal Necessity Ent Balance	112.00 Hours	07/01/2017	06/30/2018	Year to Date
Sick Ent Balance	244.00 Hours	07/01/2017	06/30/2018	Year to Date
Vacation Ent Balance	528.00 Hours	07/01/2017	06/30/2018	Year to Date

Go To [Forecast Balance](#)

- You can forecast balances to see if you have enough sick leave, vacation, and so on, as of a certain date. To do this, click the **Forecast Balance** link (found at the bottom of the screen). This will take you to a different screen.
- Enter the **As of Date** and **Absence Name**. Click **Forecast Balance**. Review the forecasted balance details.

Forecast Balance

As of Date 03/12/2018 [icon]
Filter by Type All [dropdown]
*Absence Name Vacation [dropdown]
Completed Successfully!

Current Balance 528.00 Hours**
The Current Balance is the balance from the previous finalized absence period.

Forecast Balance

Forecast results appear here

Forecast Balance Details

Absence Name	Forecast Element	Value
Vacation	As of Date - Forecasted Available Balance	500.00
Vacation	As of Date - Forecasted Total Takes	60.00