

Payroll User Group Meeting/ Absence Management

Presented by Joan Smith| March 28, 2017



SAN DIEGO COUNTY
OFFICE OF EDUCATION

CUSTOMER RESOURCE CENTER

Agenda

- Purpose and Scope
- News/Updates
- Job Data effects on Absence Management
- Impact of Work Schedules on Absence Entries
- AB1522
- Sick Leave Half Pay
- Balance Adjustments
- Feedback and Reminders
- Wrap-up / Q&A



Purpose and Scope

- Give users knowledge
 - How changes on Job Data may affect Absence Balances
 - How to correct Work Schedules
 - How to use Sick Half Pay
 - Retro triggers for Absence Management
 - Affect of Balance adjustments
- Helpful Reminders



News/Updates

- 1st Off Cycle run - 04/03/2017 with a 04/05/2017 issue date
- 2nd Off Cycle run – 04/06/2017 with a 04/10/17 issue date
- Time and Labor Loads – 04/14/2017 and with each PreCalc
- On Cycle PreCalc– 04/17/2017 and 04/18/2017
- Final Calc – 04/19/2017
- Users now have the ability to select a combo code on Absence Event on Timesheet



Job Data Effects on Absence Management

- Termination on Job Data
 - Vacation balances are zeroed out when calculation is finalized. Sick is still visible.
 - Vacation balance can be viewed on Results by Calendar for month of termination.
- Accrual Hours Factor or Total Work Days on Payroll Tab
 - Changes to these fields with an effective date after accruals are given will not update accruals. Balance adjustments will need to be done.



Job Data Effects on Absence Management

Navigation: Favorites > Main Menu > Workforce Administration > Job Information > Job Data

ORACLE

Work Location | Job Information | Job Labor | **Payroll** | Salary Plan | Compensation | SDCOE Job Data

Employee [Redacted] Empl ID [Redacted]
Empl Record 0

Payroll Information Find First 1 of 3 Last

Effective Date 07/01/2016 [Go To Row](#)

Effective Sequence 2 Action Data Change

HR Status Active Reason Other

Payroll Status Active Job Indicator Primary Job

Current

Payroll System Payroll for North America

Absence System Absence Management

Payroll for North America

Pay Group 99M SDCOE Paygroup

Employee Type S Salaried

Tax Location Code SDCOE SDCOE

GL Pay Type

Holiday Schedule 099 SDCOE

FICA Status Subject [Edit ChartFields](#)

Combination Code

Absence Management System

Pay Group 099CLSM SDCOE Classified Mgt

Setting

- Use Pay Group Eligibility
- Use Pay Group Rate Type
- Use Pay Group As Of Date

Eligibility Group

Exchange Rate Type

Use Rate As Of

Accrual Hours Factor 8.000000

Total Work Days 261



Job Data Effects on Absence Management

- Absence Management System Pay Group
 - Changes to the Absence Management Pay Group retroactive to July 1 after accruals will be recalculated on entitlements for the employee's new absence pay group and will result in double entitlements. Balance adjustments will need to be done to correct
- Change in Empl Class
 - Accruals will be reevaluated and updated if necessary
- Change in Full Time Part Time Flag on Position (Job Information Tab on Job Data)
 - Accruals will be reevaluated and updated if necessary



Job Data Effects on Absence Management

Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Job Information ▾ > Job Data

ORACLE

Work Location Job Information Job Labor Payroll Salary Plan Compensation SDCOE Job Data

Employee [Redacted] Empl ID [Redacted]
Empl Record 0

Job Information ? Find First 1 of 3 Last
Go To Row

Effective Date 07/01/2016
Effective Sequence 2 Action Data Change
HR Status Active Reason Other
Payroll Status Active Job Indicator Primary Job
Current 📅

Job Code 22713 Specialist
Entry Date 03/02/2015
Supervisor Level
Supervisor ID [Redacted] 🔍
Reports To [Redacted] [Redacted]
Regular/Temporary Permanent Full/Part Full-Time 12 months
Empl Class Class/Mgr *Officer Code None
Regular Shift Not Applicable Shift Rate
Classified Ind Classified Shift Factor

Personalize | Find | 🔍 | 📄 | First 1 of 1 Last

Filename	Attached File	Add Attachment	View Attachment		
1		Add Attachment	View Attachment	+	-



Impact of Schedules on Absence Entries


- Absence Event uses Work Schedule and Holiday schedule assigned to the Empl ID and Empl Record to calculate the duration of hours for the absence
 - Default is based on employee's assigned Workgroup (typically 8 hours a day)
 - Leaving default may cause inaccurate hours taken
 - Leaving default may cause inaccurate balances
 - Incorrect Holiday Schedule may allow time to be entered for a holiday in error
 - Incorrect Holiday Schedule may result in zero hours being calculated for duration



Impact of Schedules on Absence Entries

SS Create Absence Req Help

Absence Event Details

 Teacher - Resource Program

Instructions
Enter Start Date, End Date, and Absence Name. Then complete the rest of the required fields before returning to the Timesheet page.

Absence Detail ?

*Start Date [View Monthly Calendar](#)

End Date

Original Start Date

Filter by Type ▼

*Absence Name ▼ **Current Balance** 79.50 Hours

Reason ▼

Partial Days

Leaving default schedule. Incorrect hours. Employee works 7 hours/day



Impact of Schedules on Absence Entries

[Favorites](#) > [Main Menu](#) > [Manager Self Service](#) > [Time Management](#) > [Manage Schedules](#) > [Assign Work Schedule](#)

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Assign Work Schedule

Employee ID
 Teacher - Resource Program Employment Record 0

Actions ▾

[Assign Schedules](#) [Personalize](#) | [Find](#) | [View All](#) | [Print](#) | [Refresh](#) First 1 of 1 Last

[Primary Schedule](#) | [Alternate Schedule](#)

*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Show Schedule
08/18/2016	Use Default Schedule	03700	MF-FIXED-8	MF 8.0 Fixed	Show Schedule

[View history of Schedule Assignments, including default changes](#)

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Refresh](#) [Update/Display](#) [Include History](#) [Correct History](#)

[Favorites](#) > [Main Menu](#) > [Manager Self Service](#) > [Time Management](#) > [Manage Schedules](#) > [Assign Work Schedule](#)

ORACLE

Assign Work Schedule

Employee ID
 Teacher - Resource Program Employment Record 0

Actions ▾

[Assign Schedules](#) [Personalize](#) | [Find](#) | [View All](#) | [Print](#) | [Refresh](#) First 1-2 of 2 Last

[Primary Schedule](#) | [Alternate Schedule](#)

*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Show Schedule
08/19/2017	Select Predefined Schedule	03700	M-F7	Mon - Fri 7	Show Schedule
08/18/2016	Use Default Schedule	03700	MF-FIXED-8	MF 8.0 Fixed	Show Schedule

[View history of Schedule Assignments, including default changes](#)


[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Refresh](#) [Update/Display](#) [Include History](#) [Correct History](#)



Impact of Schedules on Absence Entries

SS Create Absence Req Help


Absence Event Details





Teacher - Resource Program

Instructions
Enter Start Date, End Date, and Absence Name. Then complete the rest of the required fields before returning to the Timesheet page.

Absence Detail [?](#)

* Start Date  [View Monthly Calendar](#)

End Date 

Original Start Date 

Filter by Type ▼


* Absence Name ▼ **Current Balance** 79.50 Hours

Reason ▼


Partial Days ▼

Duration Hours

Additional Information

Combo Code 

Comments

Reporter Comments: 



Impact of Schedules on Absence Entries

Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Job Information ▾ > Job Data 🔍

ORACLE

Work Location Job Information Job Labor **Payroll** Salary Plan Compensation SDCOE Job Data

Employee Empl ID [REDACTED]
Empl Record 0

Payroll Information ⓘ Find First 1 of 3 Last

Effective Date 07/01/2016 Go To Row

Effective Sequence 2 Action Data Change

HR Status Active Reason Other

Payroll Status Active Job Indicator Primary Job Current 📅

Payroll System Payroll for North America

Absence System

Payroll for North America ⓘ

Pay Group 🔍 SDCOE Paygroup

Employee Type 🔍 Salaried

Tax Location Code 🔍 SDCOE

GL Pay Type

Combination Code

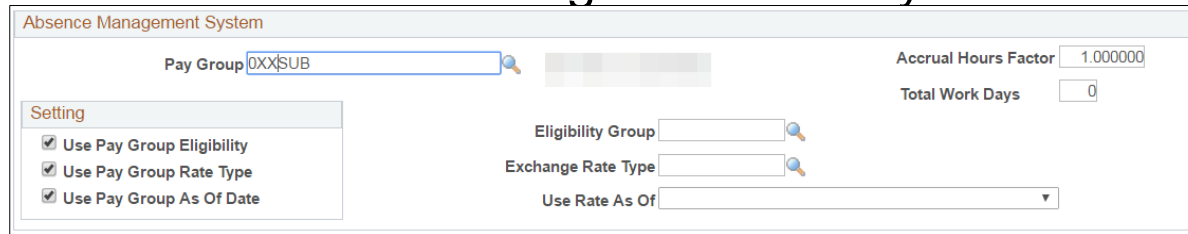
Holiday Schedule 🔍 SDCOE

FICA Status Edit ChartFields



AB1522

- Requirements for AB 1522 and using PeopleSoft Absence Management
 - Enrolled in Absence Management on Payroll tab on Job Data



The screenshot displays the 'Absence Management System' interface. At the top, the title 'Absence Management System' is visible. Below it, the 'Pay Group' is set to '0XXSUB'. To the right, the 'Accrual Hours Factor' is set to '1.000000' and 'Total Work Days' is set to '0'. A 'Setting' box on the left contains three checked options: 'Use Pay Group Eligibility', 'Use Pay Group Rate Type', and 'Use Pay Group As Of Date'. To the right of the settings box, there are three input fields: 'Eligibility Group', 'Exchange Rate Type', and 'Use Rate As Of'.

- Must be employed for 90 days before accruing sick leave
 - Required to work 30 days in each fiscal year
 - Can accrue up to 24 hours each fiscal year
 - The maximum hours to carry over to new fiscal year is 48 hours
- Use the M_AM_District_Balances query for all balances including AB 1522 employees



Sick Leave Half Pay

- Sick Half Pay cannot be used until sick leave has been exhausted.
- To enter additional sick leave prior to employee beginning Sick Half Pay
 - Sick Half Pay entries dated after sick leave must be removed and reentered and forecasted after entering Sick entry
- Probation time must be completed before an employee can have Sick Half Pay
- Sick Differential for Certificated is entered on the timesheet



Balance Adjustments

- Balance Adjustments are processed with the nightly process and balances will be updated and reflected on the Results by Calendar
- Balance adjustments must be entered with a date after the employee's hire date to update balance



Feedback and Reminders

- Absences for April 30, 2017 payroll will be finalized in the morning on April 17, 2017
- Use the following queries to audit prior to precalc:
 - M_AM_ABSENCES_AUDIT – List of absence entries that have not been finalized
 - M_AM_ABSENCE_NOT_SUBMITD – List of absences that have been entered and saved but not submitted
 - M_AM_UNAPPROVED_ABSENCES – List of absences that need to be approved
 - M_AM_UNAPPRVD_ABSENCES_W_SUPVR - List of absences that need to be approved with Employee Reports to id number and Supervisor ID and Name
 - M_AM_UNAPPRVD_ABSENCE_NO_SUPVR - List of absences that need to be approved who have no assigned supervisor in PeopleSoft



Final Notes

- Next meeting: Tuesday, April 25, 2017
- We are looking for presenters or possible meeting locations for future meetings
- If you have presentation ideas, please let us know
 - Joan Smith(joan.smith@sdcoe.net)
 - Sally Morton (sally.morton@sdcoe.net)
- Thank you for your attendance



Wrap-up / Q&A



Q & A

- Since vacation balances are zeroed out during the month of termination, where will the most accurate balance be for processing their VPO? What if there was vacation usage during their final month worked?
 - Look at the Results by Calendar for month of termination. Make sure to look at the last record for that month.
- Is there one report that shows balances in all employee records?
 - M_AM_DISTRICT_BALANCES
- Absences updated on the morning of the 17th or 18th? First calcs are the 17th.
 - April 18th
- If a change is made from 8.0 to 6.0 on 9/1 will there just be an adjustment made to sick leave hours or will it trigger an entire new entitlement amount?
 - It causes a retro trigger and re-evaluates if change goes back to July and district advances. If district advances leaves and change does not go back to July manual adjustments will need to be done. If district accrues the change will be reflected in the next calc
- Is the retro trigger only when you use the July 1 dates?
 - Yes. Also retro triggers are done when empl class and absence paygroup are changed. This causes system to reevaluate.
- When emp term-how do we unearn the employee when the balance is zero? They are granted 10 days vacation, but when they term they only have earned 6. How do you take the 4 days off.
 - Just need to do a balance adjustment; prior to the termination.



Q & A

- Does the District Balances query show all entitlement changes that were system triggered? For example, when an employee changes from 3 to 6 hours, will it show both levels of changes?
 - No, just shows the balances at that time.
- Is it possible to have system not zero out the vacation balance upon termination?
 - No, that is a delivered process
- If we have an employee who was in the wrong absence paygroup and has not been accruing, if we update in job data effective July 1st will it accrue?
 - It should re-evaluate and provide the adjustment. If already provided entitlements...it may provide double. Just look at balances and check to see if adjustments need to be done or not.
- Will we ever be able to accrue vacation hours like AB 1522 sick hours?
 - This would require a massive configuration change.
- Does the M_AM_District_Balances query give balances as of the last Absence Mgt run or from the Results by Calendar balances which reflect overnight processing.
 - It is the current balance.
- Our district chose to give the 24 hrs upfront, this will not carry over hours at the end of the school year correct?
 - Correct
- Where can I find more info on the Excel to CI for leaves?
 - On CRC's website...under resources, job aids, HCM Excel to CI. Can also submit a Heat ticket for assistance.



Q & A

- Will the extra day run an extra abs mgmt calc?
 - No it will not. All entries must be in by the 1st pre-calc
- Is there a way for a mass payout for June, or does it happen individually?
 - Send in configuration change to CRC to have this changed
- If an employee goes from "sub" to a regular contracted employee mid year....in that case, we have to manually enter their entitlements??? right?
 - Yes
- For transfer of sick leave, will the adjustments show up as an adjustment or just be added to the entitlement?
 - Balance adjustments are the only items that show as adjustments on results by calendar

