



2022

Absence Admin Guide



Camptra Technologies
1309 W 15th Street
Suite 240
Plano, TX 75075



info@camptratech.com

V1

Camptra Technologies

9/27/2022

Guide Usage and Disclosures.....	3
Guide Information	3
How To Use This Guide.....	3
Overall Process Flow.....	4
Glossary of Terms.....	5
Absence Administration.....	7
Create Eligibility Profiles.....	7
Manage Eligibility Profiles	11
Manage Derived Factors	15
Add Absence Reasons.....	18
Add Absence Reasons To An Absence Type	21
Remove Absence Reasons From An Absence Type.....	26
Manage Absence Reasons.....	30
Manage Absence Plans	33
Add Absence Types.....	37
Manage Absence Types.....	41
Manage Repeating Time Periods.....	44
Absence Fast Formulas.....	47
Control Absence Approvals For HR Initiated Transactions	51
Add Absence Plan Balance Adjustment Reasons	55
Settings To Allow HR To Enter Absence With A Negative Balance	59
Create A Calendar Event	63
Daily Absence Management	67
View Employee Absence Plans.....	67
Manually Enroll An Employee Into A Plan.....	69
Manually Adjust Plan Balance.....	73
Update Balance Details.....	77
View Current & Projected Leave Balance	82
Update Absence Plan Enrollment Date	85
Review Accrual Rates.....	88
Run Accruals Process For An Employee.....	92
End Date A Plan.....	95

Delete Plan Enrollment.....	98
Enter An Absence Request On Behalf Of An Employee	100
HR Approve Absence Request.....	104
Withdraw An Absence Request.....	108
Calculate Accruals & Balance Process For Employee Population	111
Schedule Calculate Absence Accrual Process.....	114

Guide Usage and Disclosures

Guide Information

This guide is designed based on the Oracle Cloud HCM delivered setups; some fields may differ from your instance configurations. For example, some fields may be required in this guide that are not required in your instance. Additionally, some of the training topics discussed in this guide may not apply to your organization, but we know you'll find it helpful. If you would like a custom guide for your organization, please contact our Training Team at learn@camptratech.com.

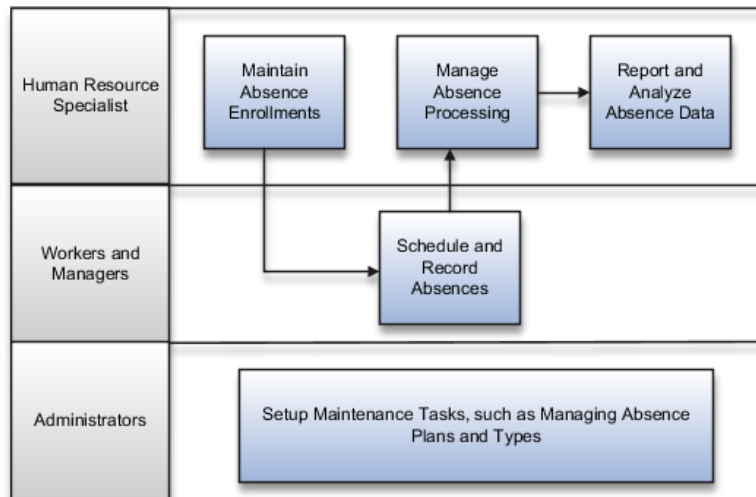
How To Use This Guide

This guide is intended to assist Admin users with their day-to-day tasks in Oracle Cloud. A few notes before you begin:

1. Any fields with an asterisk are required fields.
2. Based on your configurations, approval workflows may in place for the training topics below; those tasks would need to be approved before the additions or updates are visible in your instance.
3. You may have specific flexfields in your instance that require inputs; this guide is a generic tool and will not include those specific flexfields. You will see those fields as a context segment or not visible at all in our Oracle instance.

Overall Process Flow

Before we begin with the training content, It's important to understand the overall process flow of information in Oracle Cloud for the Absence module.



Absence Management Work Areas

To manage absences, start from the following work areas:

Role	Navigation to Work Area
HR Specialist	Select Navigator > My Client Groups > Person Management
Manager	Select Navigator > My Team > Absences
Worker	Select Navigator > Me > Time and Absences
Administrator	Select Navigator > My Client Groups > Absences

Glossary of Terms

Here we've included common terms associated to the Absence module. Please review the terms below to familiarize yourself with the Oracle Cloud terms used throughout this guide.

Absence Entitlement Band

- ✦ A level that determines the payment that employees must receive for a specific number of days during a long leave of absence based on their length of service.

Absence Entitlement Plan

- ✦ A benefit that entitles employees to receive payment while on long leaves of absence.

Absence Plan

- ✦ There are a variety of Absence plans; Vacation, PTO, Sick, FMLA, etc with highly configurable rules that enables an organization to efficiently manage employees leave locally and globally.

Absence Reason

- ✦ A reason for the leave. For example, an absence reason for a Sick day could be "sick child."

Absence Type

- ✦ A grouping of absences, such as illness or personal business, that are handled together for reporting, accrual, and compensation calculations.

Accrual Band

- ✦ A range of eligibility criteria that identify how much paid time eligible employees accrue over the course of an accrual term. The criteria may be years of service, grades, hours worked, or some other factor.

Accrual Carryover

- ✦ Amount of unused time in the previous accrual term that an employee can use in the next accrual term.

Accrual Ceiling

- ✦ Maximum amount of time that an employee can accrue in an accrual term.

Accrual Period

- ✦ A time interval, such as one month, in which employees accrue time within an accrual term.

Accrual Plan

- ✦ A benefit that entitles employees to accrue time for the purpose of taking leave.

Accrual Term

- ✦ Period of time, often one year, for which accruals are calculated.

Process

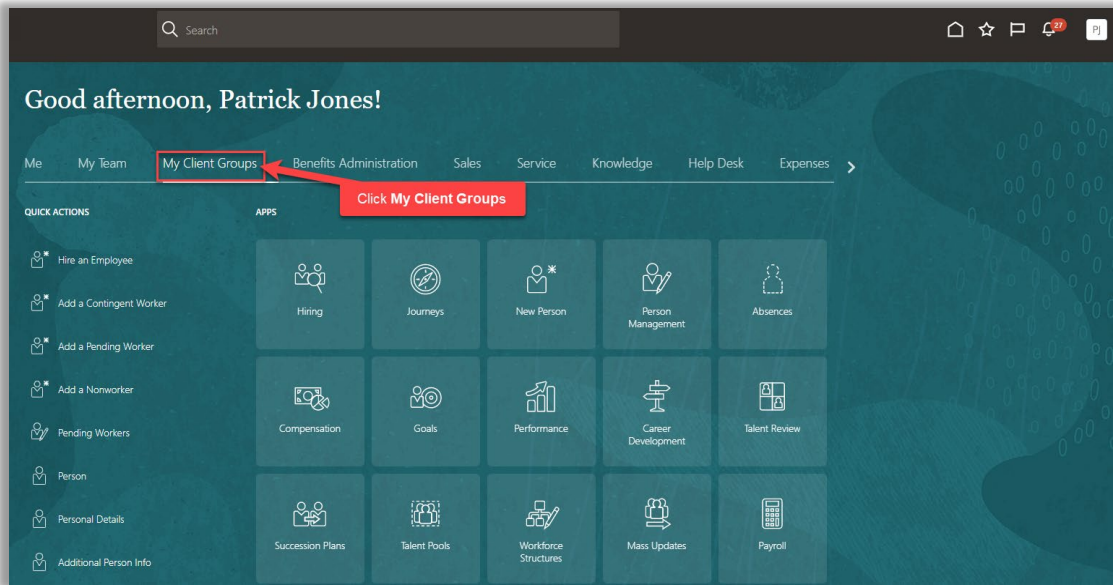
- ✦ A program that you schedule and run to process data and, if appropriate, generate output as a report. Also known as scheduled process.

Absence Administration

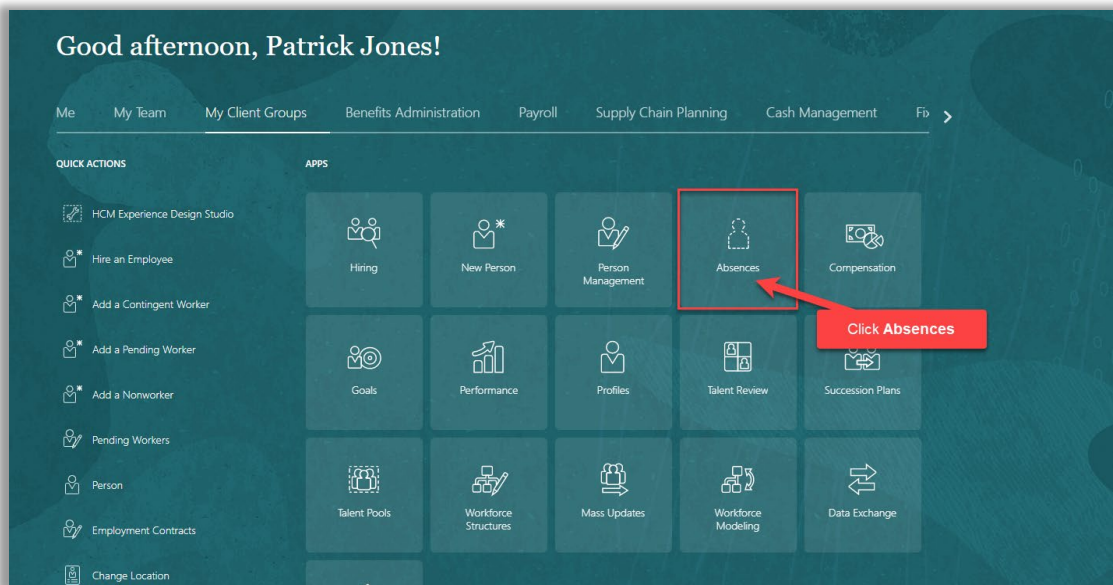
Create Eligibility Profiles

Navigation: Home>My Client Groups>Absences>Eligibility Profiles>Create>Submit

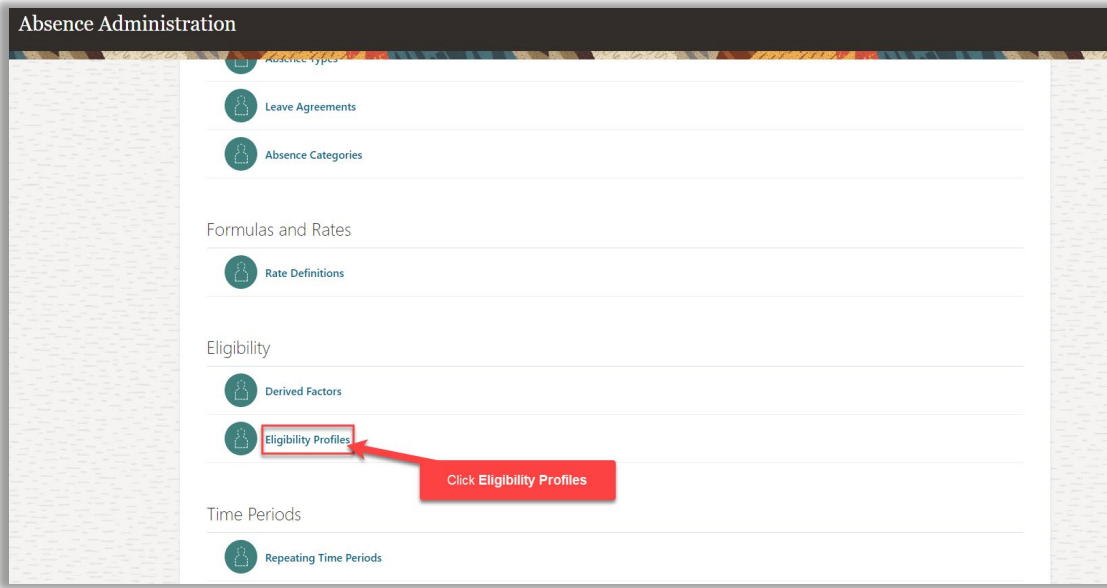
From the home screen, click **My Client Groups**



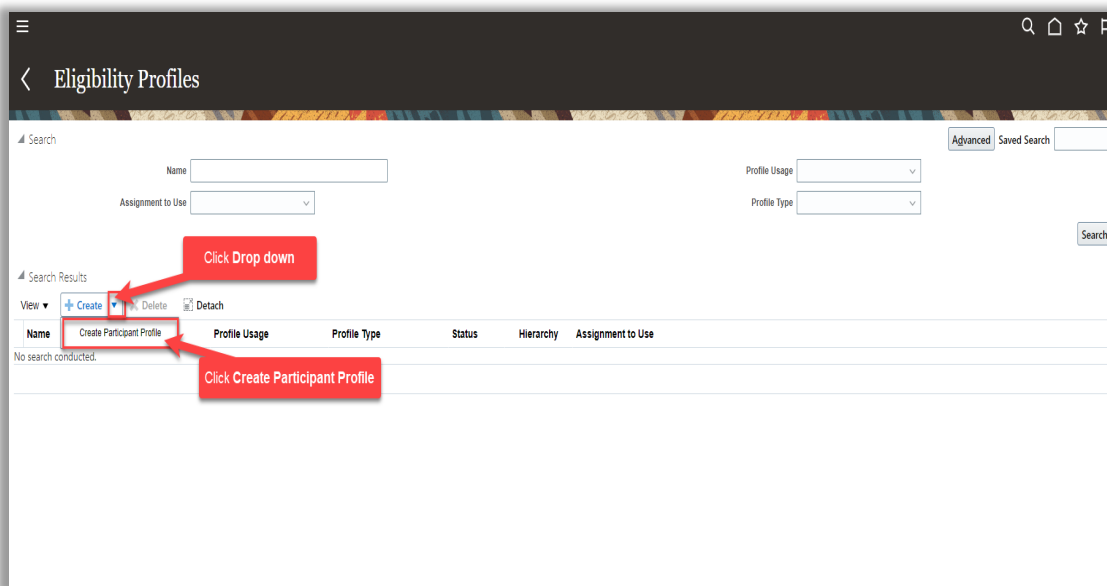
Next, click **Absences**



Scroll down and click **Eligibility Profiles**. If preferred, we can also search the words **Eligibility Profiles** in the Search box at the top



From the Eligibility Profiles Screen, we can create a new Eligibility Profile or manage existing profiles. First, we'll create an Eligibility Profile. Click **Create** then, **Create Participation Profile**



Enter the **Name**, change the profile usage to **Global**. Ensure the profile is **Active**

Create Participant Eligibility Profile

Eligibility Profile Definition

*Name: Absence Profile- PT Employees

Description:

Profile Type: Participant

*Profile Usage: Global

*Assignment to Use: Any assignment - enterpris

*Status: Active

Eligibility Criteria

Personal Employment Derived Factors Other Labor Relations

Gender Person Type Disabled Uses Tobacco Service Areas Home Location Postal Code Ranges Opted for Medicare Leave of Absence Termination Reason Qualification Competency Marital Status Religion

View + Delete Detach

*Sequence	*Gender	Exclude	Start Date	End Date
No data to display.				

Next, select the applicable **Eligibility Criteria**. Select the applicable **Tab** and the corresponding **Tab** that includes the necessary information. If we aren't sure, we can click through each tab until we find the information we need. Click + to add a row. Add the **Sequence** number 1

Create Participant Eligibility Profile

Eligibility Profile Definition

*Name: Absence Profile- PT Employees

Description:

Profile Type: Participant

*Profile Usage: Global

*Assignment to Use: Any assignment - enterpris

*Status: Active

Eligibility Criteria

Personal **Employment** Derived Factors Other Labor Relations

Assignment Status Hourly or Salaried **Assignment Category** Grade Job Position Payroll Salary Basis Department Legal Entities Performance Rating Quartile in Range Work Location Range of Scheduled Hours People Manager Job Function

View + Delete Detach

*Sequence	*Full-time or Part Time	Exclude	Start Date
1	Part-time	<input type="checkbox"/>	1/1/1951

Next, from the drop down menu, select the **Value**

Create Participant Eligibility Profile

Eligibility Profile Definition

*Name: Absence Profile- PT Employees
 Profile Type: Participant
 *Profile Usage: Global
 Description:
 *Assignment to Use: Any assignment - enterpris
 *Status: Active

Eligibility Criteria

Personal **Employment** Derived Factors Other Labor Relations

< Assignment Status Hourly or Salaried **Assignment Category** Grade Job Position Payroll Salary Basis Department Legal Entities Performance Rating Quartile in Range Work Location Range of Scheduled Hours People Manager Job Function

View + - X Delete Detach

*Sequence	*Full Time or Part Time	Exclude	Start Date
1	Part-time	<input type="checkbox"/>	1/1/1951

Expand Drop down

Click Value

If applicable, we can add additional values to the profile but selecting additional **Eligibility Criteria**. For example, Assignment Status with a **Sequence** of 1

Create Participant Eligibility Profile

Eligibility Profile Definition

*Name: Absence Profile- PT Employees
 Profile Type: Participant
 *Profile Usage: Global
 Description:
 *Assignment to Use: Any assignment - enterpris
 *Status: Active

Eligibility Criteria

Personal **Employment** Derived Factors Other Labor Relations

< **Assignment Status** Hourly or Salaried Assignment Category Grade Job Position Payroll Salary Basis Department Legal Entities Performance Rating Quartile in Range Work Location Range of Scheduled Hours People Manager Job Function Job Fan >

View + - X Delete Detach

*Sequence	*Assignment Status	Exclude	Start Date	End Date
1	Active - Payroll Eligible	<input type="checkbox"/>	1/1/1951	12/31/4712

Follow the same process to add additional Eligibility Criteria

Click **View Hierarchy** to view the Eligibility Profile information. Once reviewed, click **OK**

Edit Participant Eligibility Profile Absence Profile- PT Employees

Save Save and Close

Eligibility Profile Definition ⓘ

*Name Absence Profile- PT Employees Description

Profile Type Participant *Assignment to Use Any assignment - enterpr

Profile Usage Global *Status Active

View Hierarchy

Click View Hierarchy

Eligibility Criteria ⓘ

View Detach

Profile Criteria

- Employment
 - Assignment Category
 - Part-time
- Assignment Status
 - Active - Payroll Eligible

OK

Click OK

Click **Save and Close** to create the Eligibility Profile

Create Participant Eligibility Profile

Save Save and Close Cancel

Click Save and Close

Eligibility Profile Definition ⓘ

*Name Absence Profile- PT Employees Description

Profile Type Participant *Assignment to Use Any assignment - enterpr

Profile Usage Global *Status Active

View Hierarchy

Eligibility Criteria ⓘ

Personal Employment Derived Factors Other Labor Relations

Assignment Status Hourly or Salaried Assignment Category Grade Job Position Payroll Salary Basis Department Legal Entities Performance Rating Quantile in Range Work Location Range of Scheduled Hours People Manager Job Function Job Fan

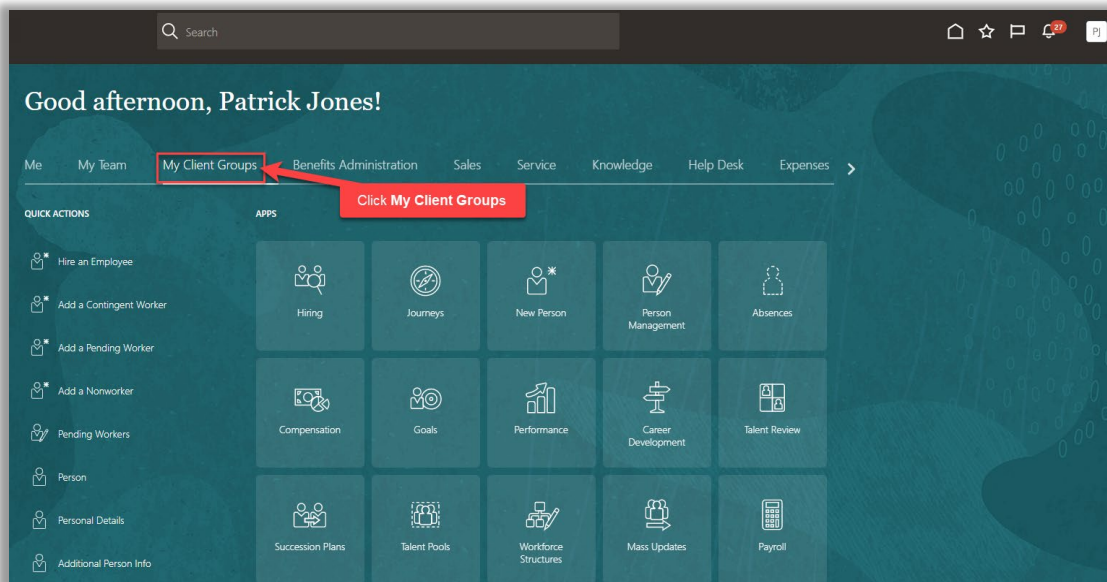
View + X Delete Detach

*Sequence	*Assignment Status	Exclude	Start Date	End Date
2	Active - Payroll Eligible	<input type="checkbox"/>	1/1/1951	12/31/4712

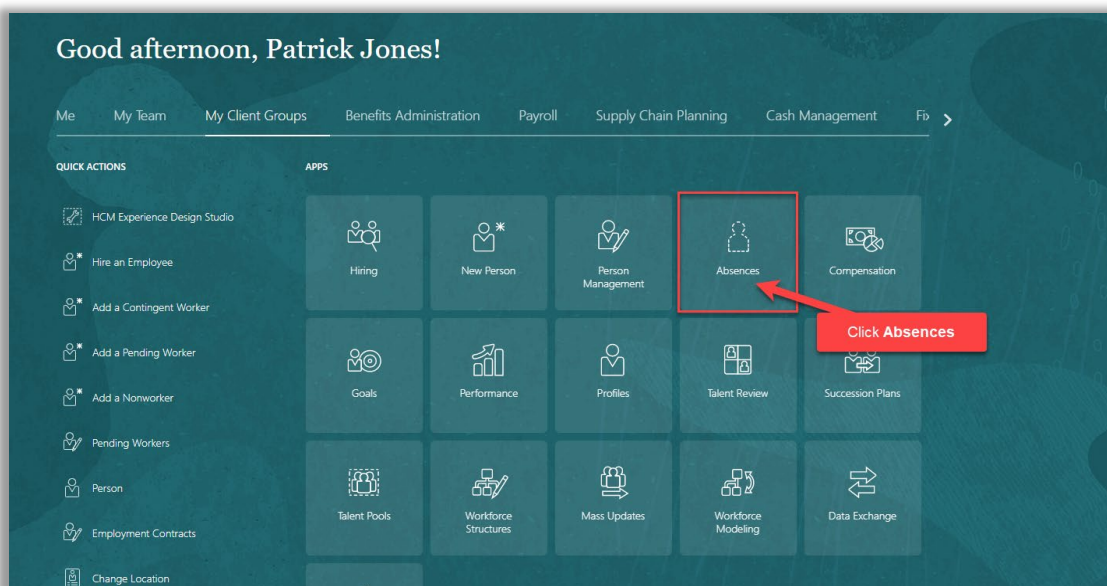
Manage Eligibility Profiles

Navigation: Home>My Client Groups>Absences>Search Eligibility Profiles

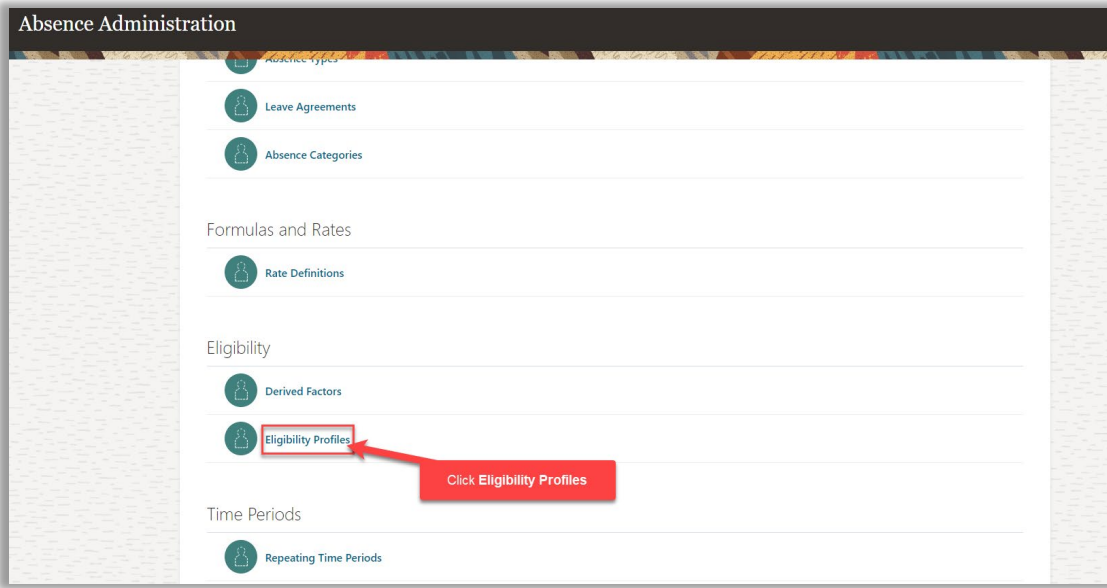
From the home screen, click **My Client Groups**



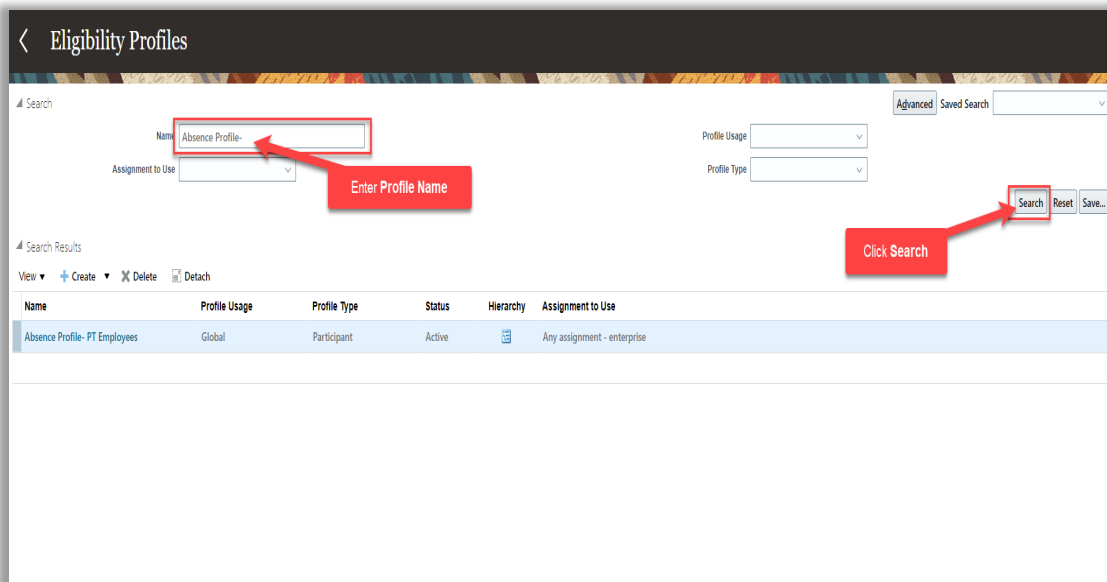
Next, click **Absences**



Scroll down and click **Eligibility Profiles**. If preferred, we can also search the words **Eligibility Profiles** in the Search box at the top



From the Eligibility Profiles Screen, we can create a new Eligibility Profile or manage existing profiles. We'll manage an **Eligibility Profile** by entering the **Name** and click **Search**



Click Eligibility Profile Name

Eligibility Profiles

Search

Name: Absence Profile-
Assignment to Use:
Profile Usage:
Profile Type:
Search Reset

Search Results

View Create Delete Detach

Name	Profile Usage	Profile Type	Status	Hierarchy	Assignment to Use
Absence Profile- PT Employees	Global	Participant	Active		Any assignment - enterprise

Click Name

Update the applicable information. Click **View Hierarchy** to view the Eligibility Profile updated information. Once reviewed, click **OK**

Edit Participant Eligibility Profile Absence Profile- PT Employees Save Save and Close

Eligibility Profile Definition

Name: Absence Profile- PT Employees Description:
Profile Type: Participant Profile Usage: Global Assignment to Use: Any assignment - enterpris Status: Active

View Hierarchy

Click View Hierarchy

Eligibility Criteria

Personal Employment Derived Factors Other Labor Relations

Assignment Status

View Create Delete Detach

Sequence	Assignment Status
1	Active - Payroll Eligible

Eligibility Criteria

View Detach

Profile Criteria

Employment

Assignment Category

Part-time

Assignment Status

Active - Payroll Eligible

Exclude Start Date

OK

Click OK

Click **Save and Close**

Edit Participant Eligibility Profile Absence Profile- PT Employees

Save Save and Close

Click Save and Close

Eligibility Profile Definition

*Name Absence Profile- PT Employees Description

Profile Type Participant *Assignment to Use Any assignment - enterpris

Profile Usage Global *Status Active

View Hierarchy

Update the below information

Eligibility Criteria

Personal Employment Derived Factors Other Labor Relations

< Assignment Status Hourly or Salaried Assignment Category Grade Job Position Payroll Salary Basis Department Legal Entities Performance Rating Quartile in Range Work Location Range of Scheduled Hours People Manager Job Function

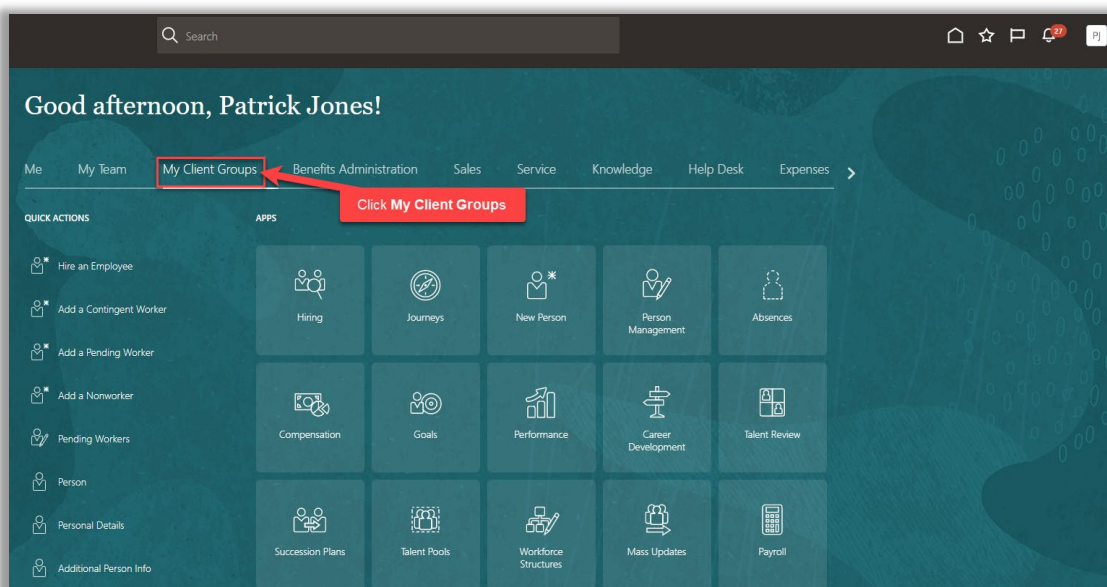
View + X Delete Detach

*Sequence	*Assignment Status	Exclude	Start Date
1	Active - Payroll Eligible	<input type="checkbox"/>	1/1/1951

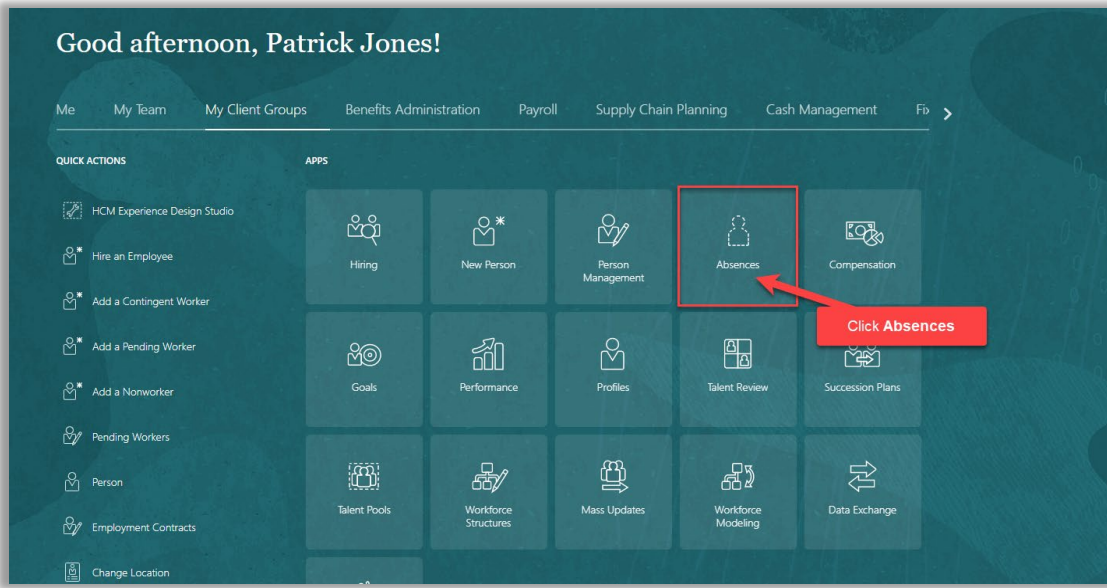
Manage Derived Factors

Navigation: Home>My Client Groups>Absences>Derived Factors

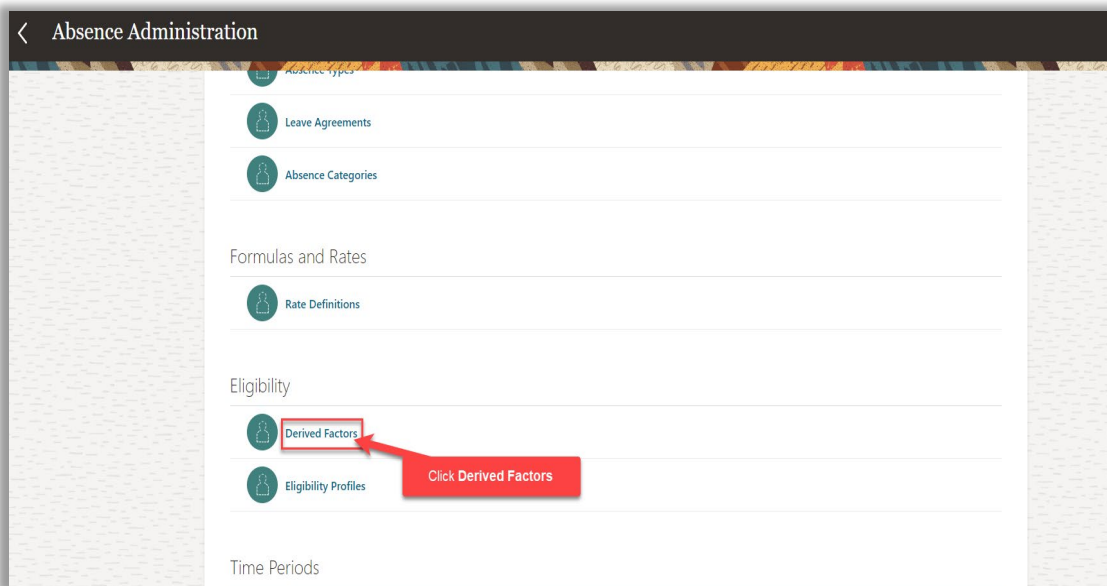
From the home screen, click **My Client Groups**



Next, click **Absences**



Scroll down and click **Derived Factors**. If preferred, we can also search the words **Derived Factors** in the Search box at the top



Derived Factors includes age, compensation, length of service, hours worked, full-time equivalent, and a combination of age and length of service. These are the derived factor components that can be added to the **Eligibility Profile**

Derived Factors

Age Length of Service Age and Service Compensation Hours Worked Full-Time Equivalent

Search

Name

Age to Use

Search Results

View Create Edit Delete Detach

Name	Age to Use	Greater than or Equal to Age	Less Than Age	Units
No search conducted.				

We can create a new Derived Factor or manage existing **Derived Factors**. We'll manage a Derived Factor by entering the **Name** and click **Search**

Derived Factors

Age Length of Service Age and Service Compensation Hours Worked Full-Time Equivalent

Search

Name

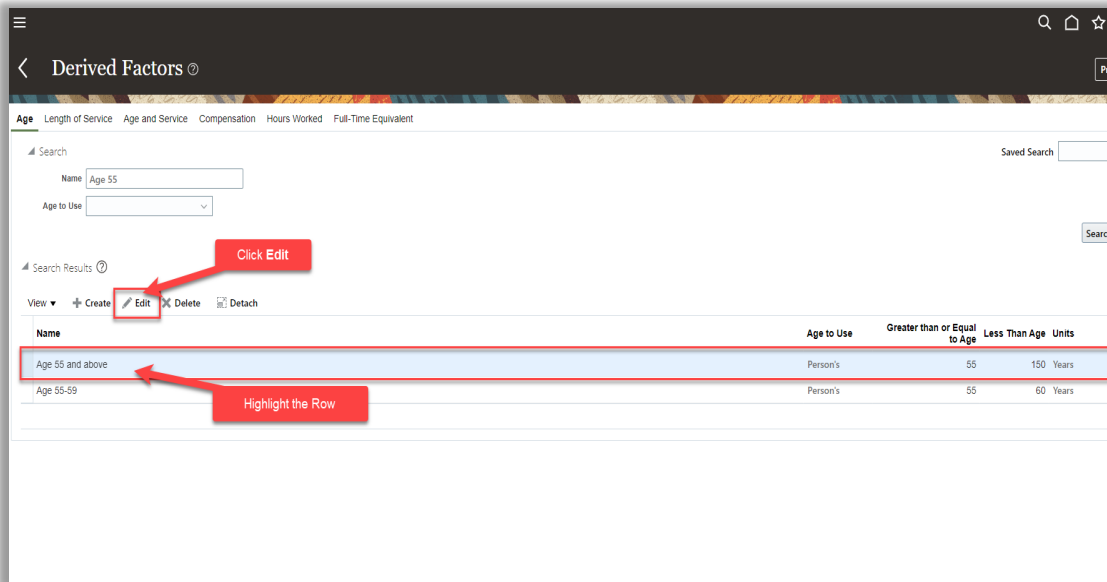
Age to Use

Search Results

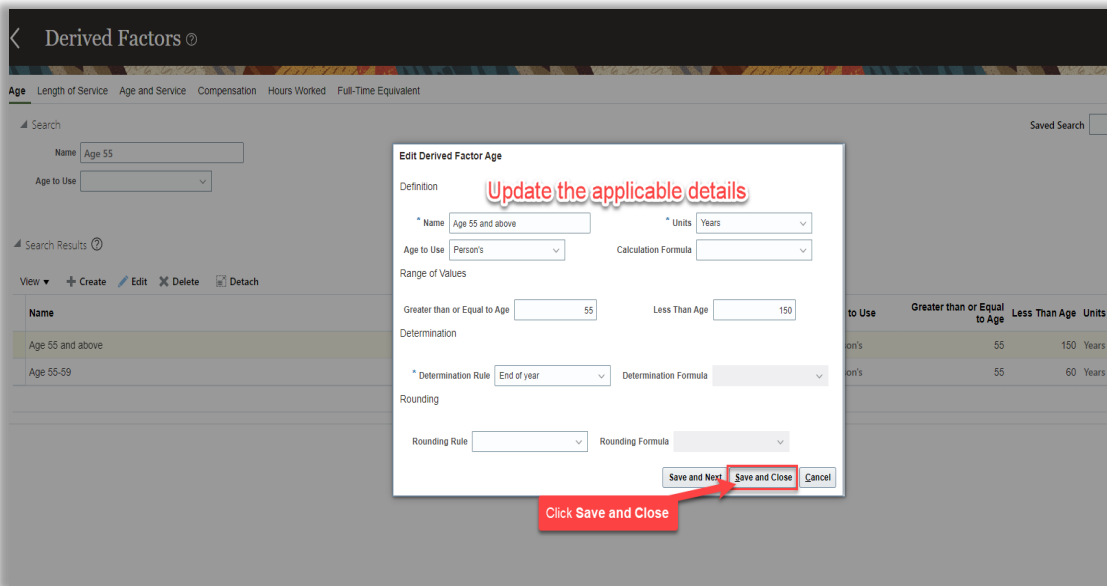
View Create Edit Delete Detach

Name	Age to Use	Greater than or Equal to Age	Less Than Age	Units
Age 55 and above	Person's	55	150	Years
Age 55-59	Person's	55	60	Years

Highlight the row and click **Edit**



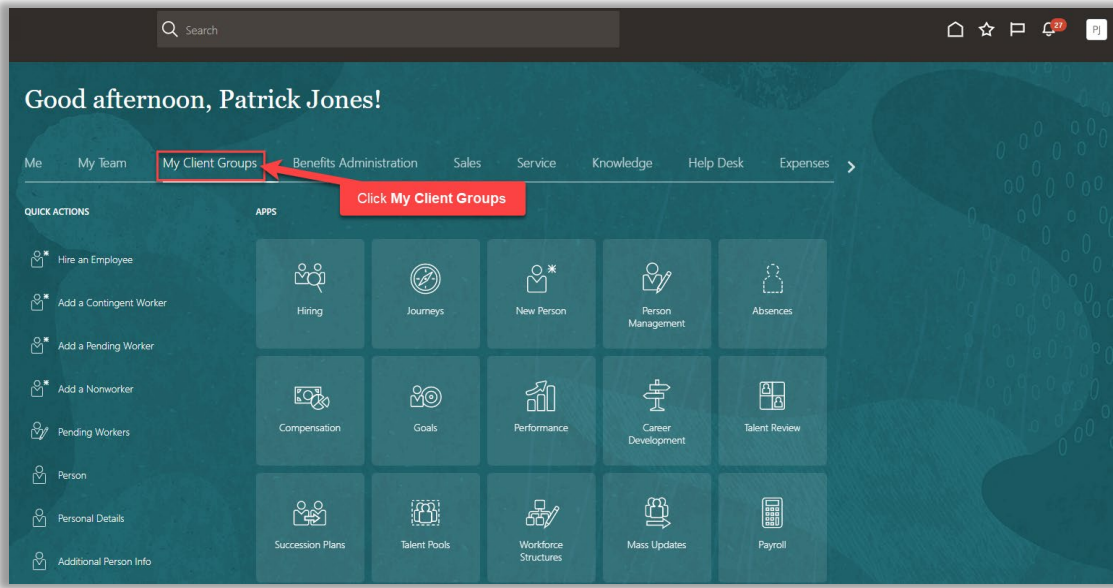
Update the applicable details and click **Save and Close**



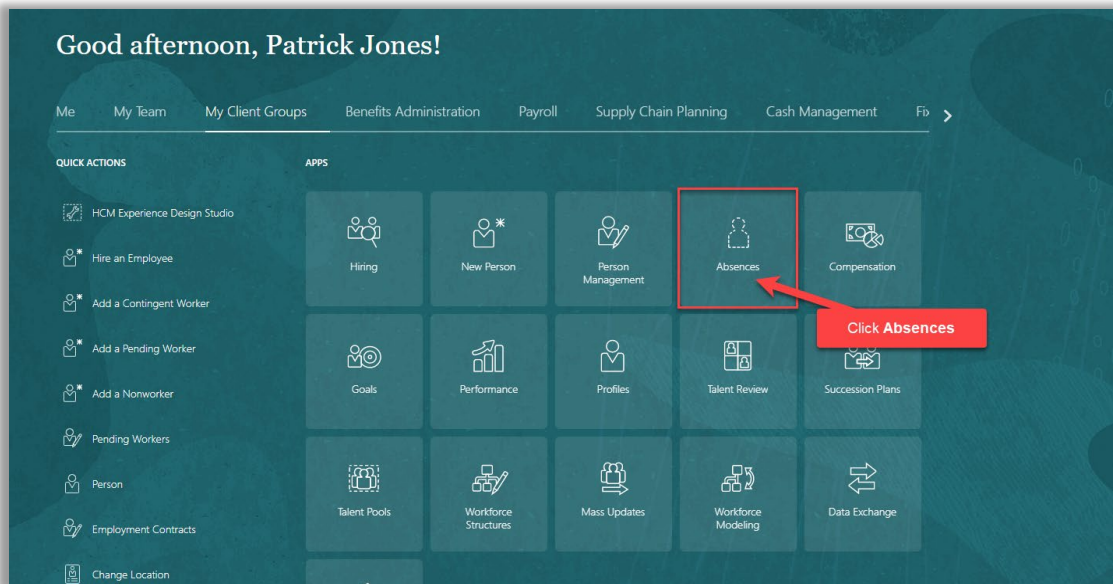
Add Absence Reasons

Navigation: Home>My Client Groups>Absences>Absence Reasons>Create>Submit

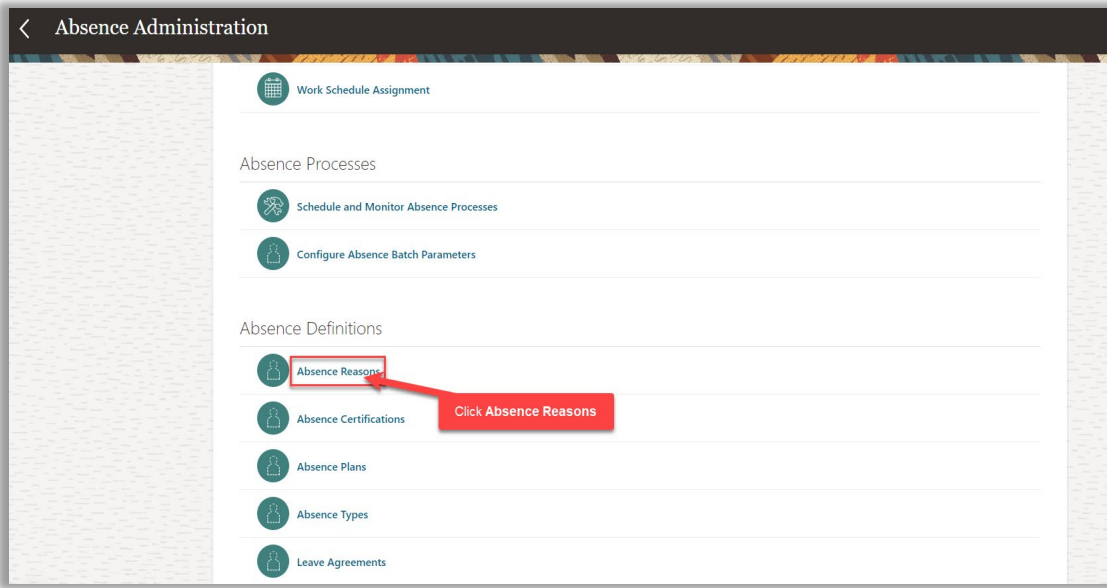
From the home screen, click **My Client Groups**



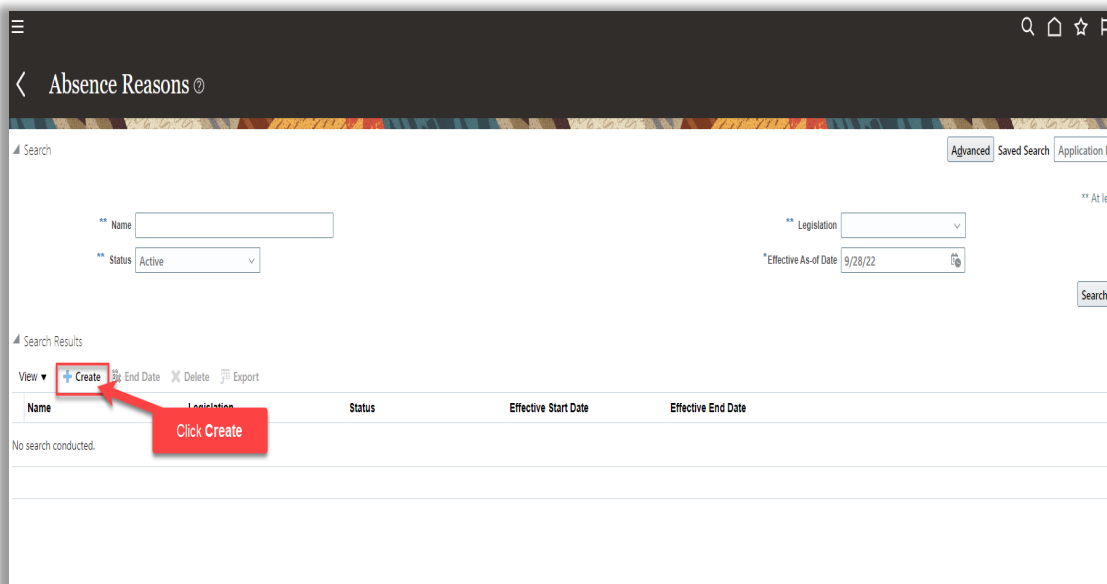
Next, click **Absences**



Scroll down and click **Absence Reasons**. If preferred, we can also search the words **Absence Reasons** in the Search box at the top



Click **Create**



Absence Reasons can be associated to multiple Absence Types or we can create a specific reason for a specific type. Enter the **Effective Date**, **Name**, and **Legislation**. The **Status** will populate to **Active**

Create Absence Reason ⓘ

Save Save and Close

*Session Effective Date 1/1/51

Basic Details

Effective Start Date 1/1/51

*Name Dependent Illness

Description

Effective End Date

*Legislation United States

*Status Active

Management User-defined

Legislative Information

Context Segment

Descriptive Information

Context Segment

Enter Effective Date

Enter Name

Select Legislation

Click **Save and Close**

Create Absence Reason ⓘ

Save Save and Close

*Session Effective Date 1/1/51

Basic Details

Effective Start Date 1/1/51

*Name Dependent Illness

Description

Effective End Date

*Legislation United States

*Status Active

Management User-defined

Legislative Information

Context Segment

Descriptive Information

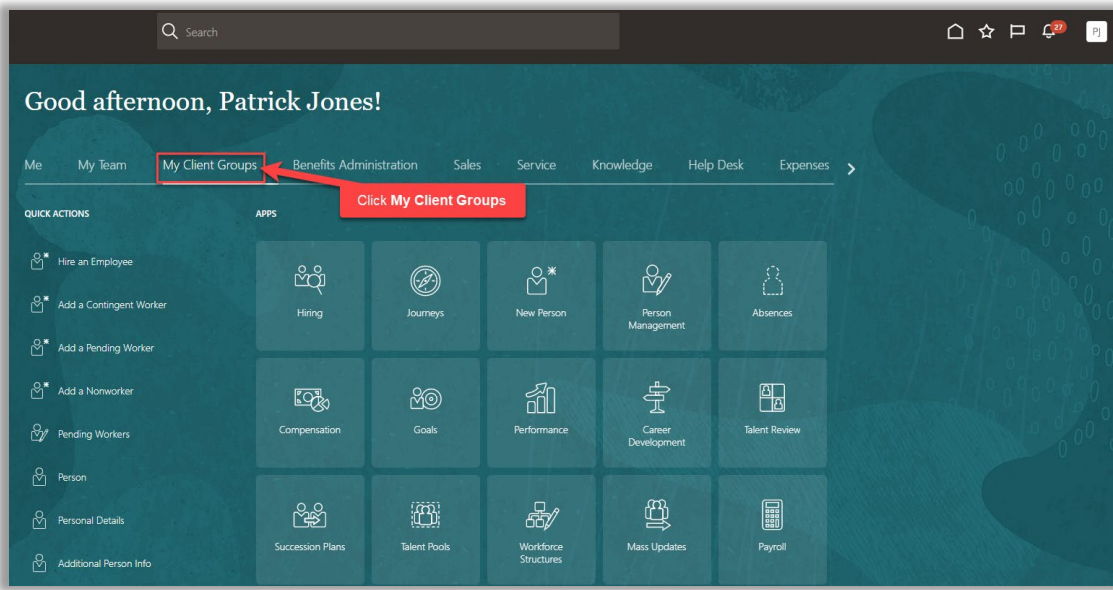
Context Segment

Click Save and Close

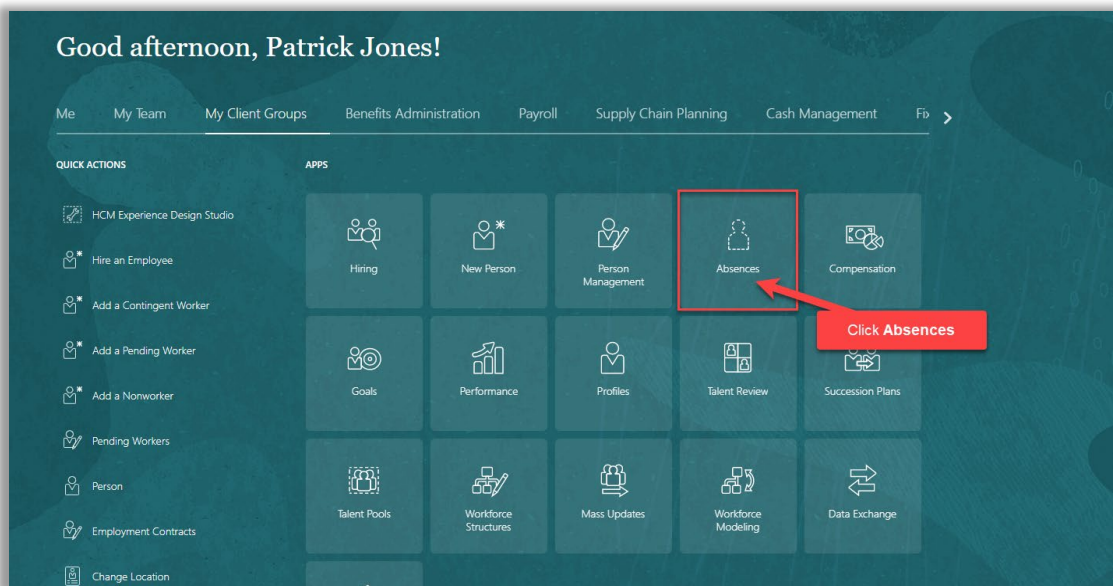
Add Absence Reasons To An Absence Type

Navigation: Home>My Client Groups>Absences>Absence Type>Search>Edit>Select and Add>Save and Close

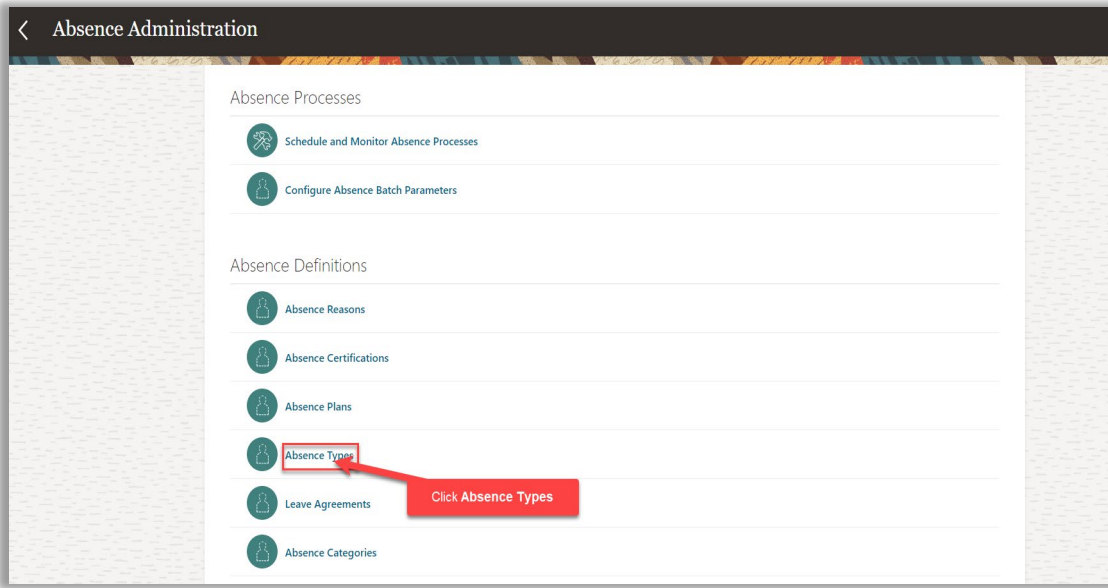
From the home screen, click **My Client Groups**



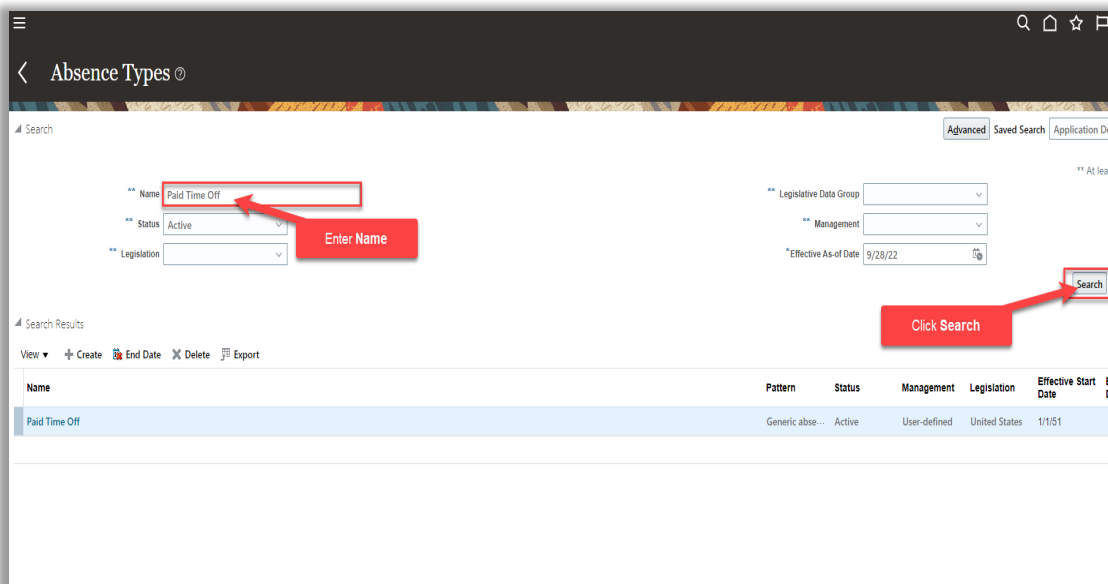
Next, click **Absences**



Scroll down and click **Absence Types**. If preferred, we can also search the words **Absence Types** in the Search box at the top



Enter the Absence Type **Name** and click **Search**



Click the Absence Type **Name**

Absence Types

Search

Advanced Saved Search Application Default

** Name Paid Time Off

** Status Active

** Legislation

** Legislative Data Group

** Management

* Effective As-of Date 9/28/22

Search Reset

Search Results

View Create End Date Delete Export

Name	Pattern	Status	Management	Legislation	Effective Start Date	Effective End Date
Paid Time Off	Generic abse...	Active	User-defined	United States	1/1/51	

Click Name

Enter the **Session Effective Date**; this is the effective date of the addition of the Reason to the Type. Click **Plans and Reasons**

View Type Paid Time Off

Save Save and Close

*Session Effective Date 1/1/51

Enter Session Effective Date

Basic Details

Effective Start Date 1/1/51

Pattern Generic absence

Management User-defined

Effective End Date

Legislation United States

Type Attributes Plans and Reasons Display Features Action Items Additional Details

Absence Plans

View Select and Add Edit

*Plan	*Status	Priority	Concurrent	Effective Start Date
Paid Time Off	Active	10	Yes	1/1/51

Click Plans and Reasons

Absence Reasons

View Select and Add Edit End Date Delete

*Reason	Linkage Reason	Default	Effective Start Date
No data to display.			

Click **Edit** then **Update**. Next, under **Absence Reasons**, click **Select and Add**

View Type Paid Time Off Save Save and Close Cancel

*Session Effective Date 1/1/51

Basic Details

Effective Start Date 1/1/51 Effective End Date
 Pattern Generic absence Legislation United States
 Management User-defined

Click Update Edit History
 Update
 Correct

Type Attributes **Plans and Reasons** Display Features Action Items Additional Details

Absence Plans

View Select and Add Edit End Date Delete

*Plan	*Status	Priority	Concurrent	Effective Start Date	Effective End Date
Paid Time Off	Active	10	Yes	1/1/51	

Absence Reasons

View Select and Add Edit End Date Delete

Reason

No data to display.

Click Select and Add

Select the **Reason** from the drop down and click **OK**

Edit Absence Type Paid Time Off Save Save and Close

*Session Effective Date 1/1/51

Basic Details

Effective Start Date 1/1/51 Effective End Date
 Pattern Generic absence Legislation United States
 Management User-defined

Type Attributes **Plans and Reasons** Display Features Action Items Additional Details

Absence Plans

View Select and Add Edit End Date Delete

*Plan	*Status	Priority	Concurrent	Effective Start Date
Paid Time Off	Active	10	Yes	1/1/51

Absence Reasons

View Select and Add Edit End Date Delete

Reason

No data to display.

Select and Add Reason to Type

Effective Start Date 1/1/51 Effective End Date
 *Reason Illness Default No
 Linkage Reason No

Select Reason OK Cancel

Click OK

Click **Save and Close**

Session Effective Date 1/1/51

Effective Start Date 1/1/51

Effective End Date

Pattern Generic absence

Legislation United States

Management User-defined

Type Attributes **Plans and Reasons** Display Features Action Items Additional Details

Absence Plans

View Select and Add Edit End Date Delete

Plan	Status	Priority	Concurrent	Effective Start Date
Paid Time Off	Active	10	Yes	1/1/51

Absence Reasons

View Select and Add Edit End Date Delete

Reason	Linkage Reason	Default	Effective Start Date
Illness	No	No	1/1/51

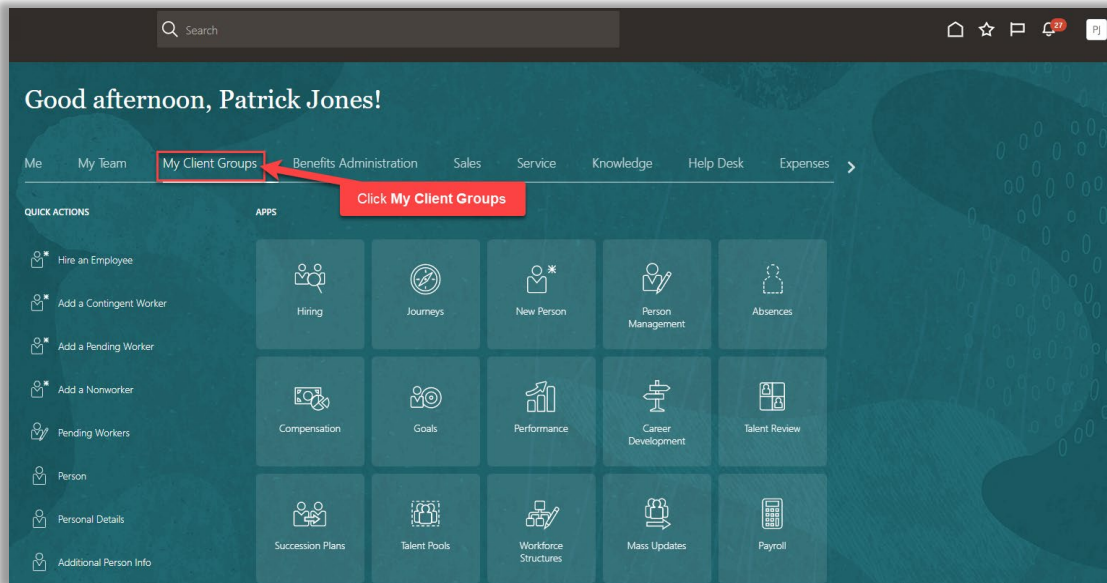
Save Save and Close

Click Save and Close

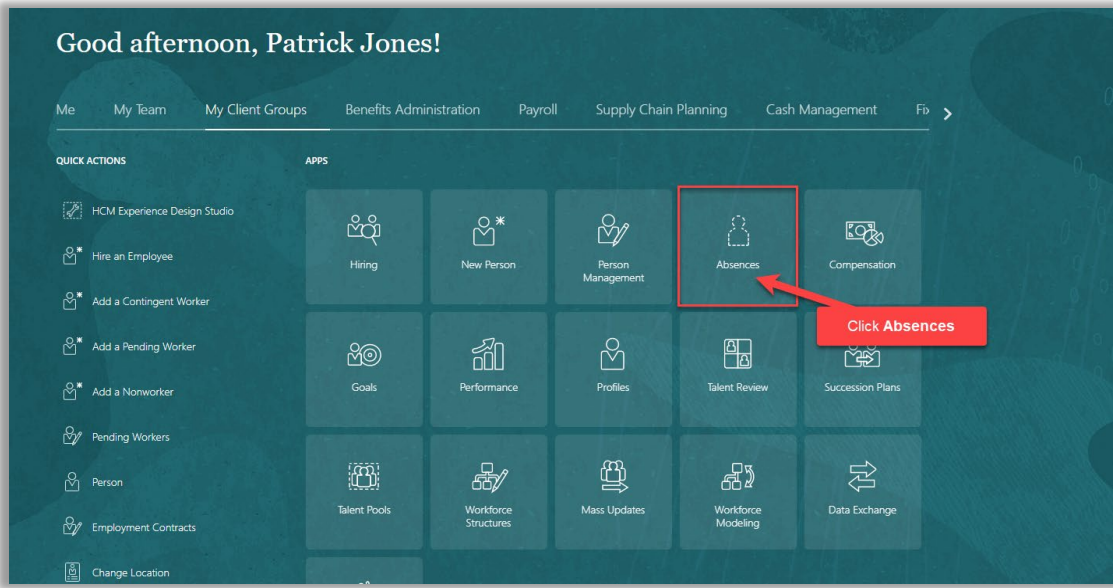
Remove Absence Reasons From An Absence Type

Navigation: Home>My Client Groups>Absences>Absence Type>Search>Edit>Save and Close

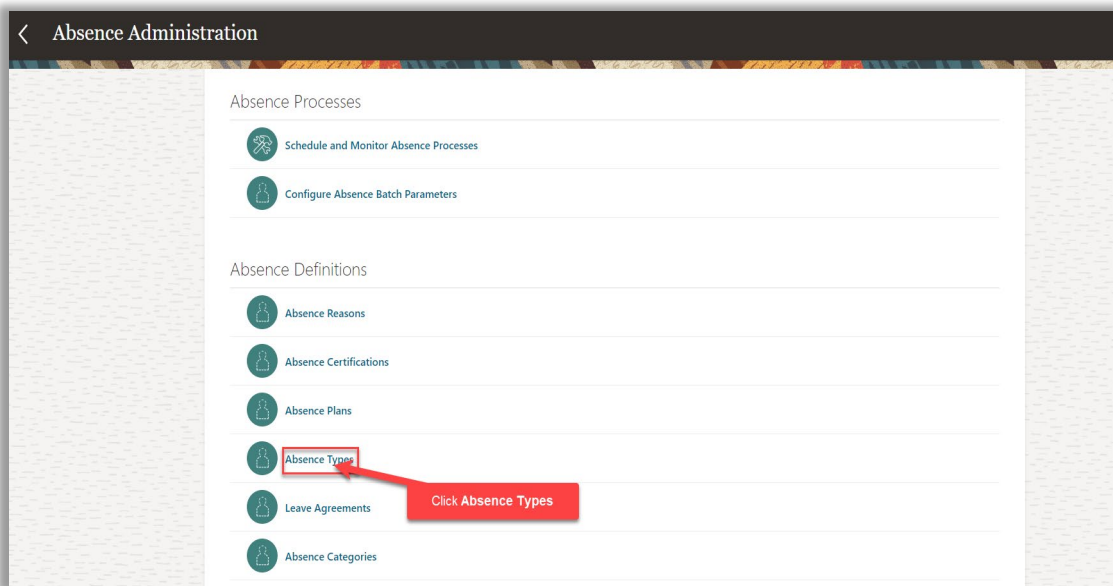
From the home screen, click **My Client Groups**



Next, click **Absences**



Scroll down and click **Absence Types**. If preferred, we can also search the words **Absence Types** in the Search box at the top



Enter the Absence Type **Name** and click **Search**

Absence Types

Search

Advanced Saved Search Application Default

** Name ** Legislative Data Group

** Status ** Management

** Legislation * Effective As-of Date

Search

Click Search

Search Results

View Create End Date Delete Export

Name	Pattern	Status	Management	Legislation	Effective Start Date
Paid Time Off	Generic abse...	Active	User-defined	United States	1/1/51

Click the Absence Type Name

Absence Types

Search

Advanced Saved Search Application Default

** Name ** Legislative Data Group

** Status ** Management

** Legislation * Effective As-of Date

Search Reset

Search Results

View Create End Date Delete Export

Name	Pattern	Status	Management	Legislation	Effective Start Date	Effective Date
Paid Time Off	Generic abse...	Active	User-defined	United States	1/1/51	

Click Name

Enter the **Session Effective Date**; this is the effective date of the removal of the Reason to the Type. Click **Plans and Reasons**

View Type Paid Time Off

Session Effective Date: 1/1/51

Basic Details

Effective Start Date: 1/1/51
 Pattern: Generic absence
 Management: User-defined
 Effective End Date:
 Legislation: United States

Type Attributes: **Plans and Reasons** | Display Features | Action Items | Additional Details

Absence Plans

*Plan	*Status	Priority	Concurrent	Effective Start Date
Paid Time Off	Active	10	Yes	1/1/51

Absence Reasons

No data to display.

Click **Edit** then **Update**. Next, under **Absence Reasons**, highlight the row of the Absence Reason and click **Delete**

View Type Paid Time Off

Session Effective Date: 1/1/51

Basic Details

Effective Start Date: 1/1/51
 Pattern: Generic absence
 Management: User-defined
 Effective End Date:
 Legislation: United States

Type Attributes: **Plans and Reasons** | Display Features | Action Items | Additional Details

Absence Plans

*Plan	*Status	Priority	Concurrent	Effective Start Date	Effective End Date
Paid Time Off	Active	10	Yes	1/1/51	

Absence Reasons

*Reason	Linkage Reason	Default	Effective Start Date	Effective End Date
Illness	No	No	1/1/51	

Click **Save and Close**

Session Effective Date: 1/1/51

Effective Start Date: 1/1/51

Effective End Date:

Pattern: Generic absence

Management: User-defined

Legislation: United States

Plans and Reasons

Plan	Status	Priority	Concurrent	Effective Start Date
Paid Time Off	Active	10	Yes	1/1/51

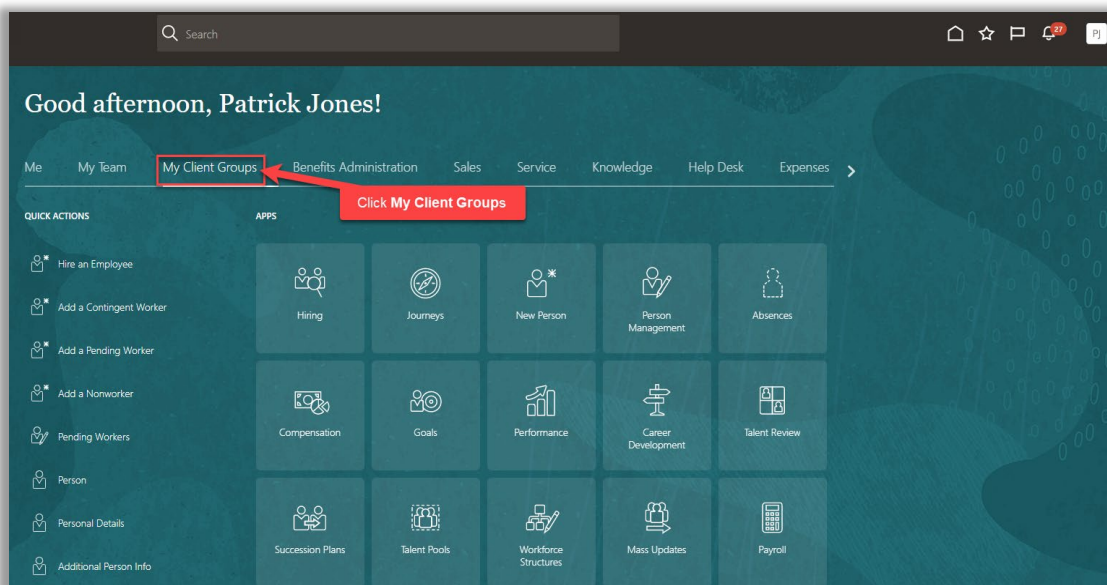
Absence Reasons

Reason	Linkage Reason	Default	Effective Start Date
No data to display.			

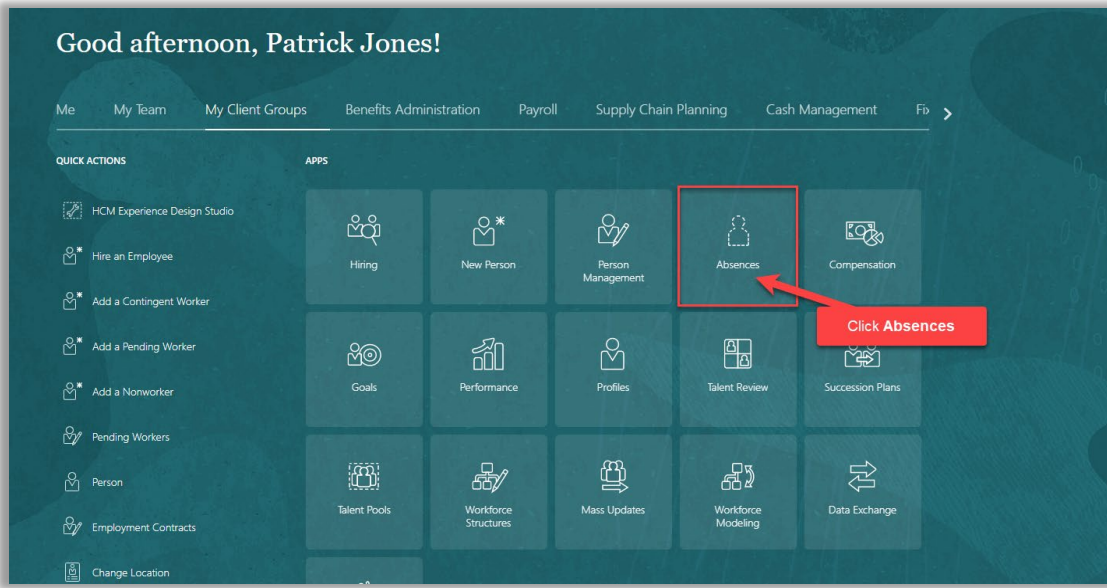
Manage Absence Reasons

Navigation: Home>My Client Groups>Absences>Absence Reasons>Edit>Submit

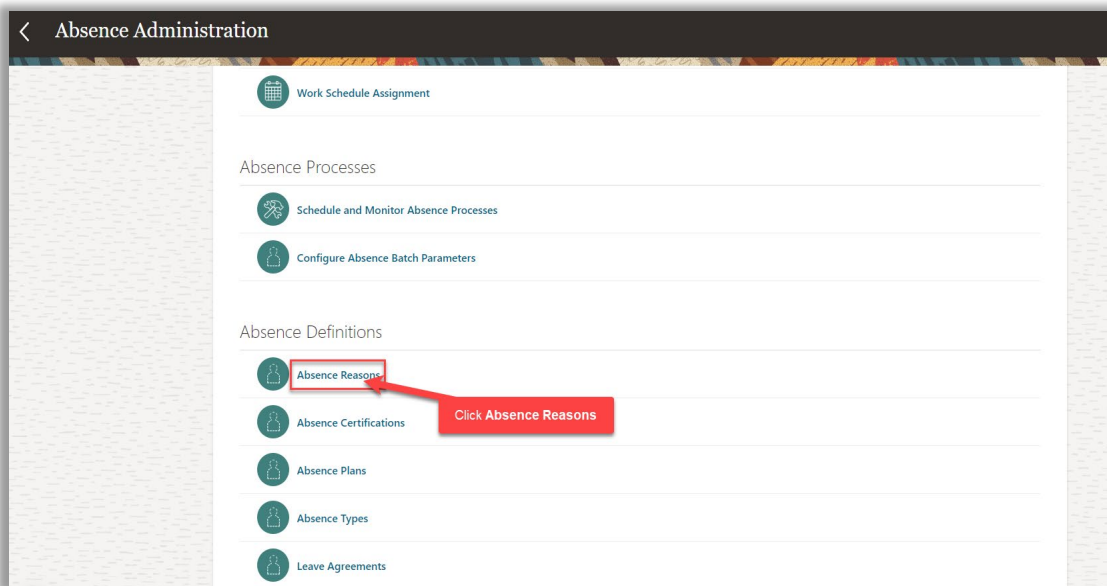
From the home screen, click **My Client Groups**



Next, click **Absences**



Scroll down and click **Absence Reasons**. If preferred, we can also search the words **Absence Reasons** in the Search box at the top



Enter the Absence Reason **Name** and click **Search**

Absence Reasons

Search

Advanced Saved Search Application De

** Name ** Legislation ** At lea

** Status * Effective As-of Date

Search

Search Results

View Create End Date Delete Export

Name	Legislation	Status	Effective Start Date	Effective End Date
Illness	United States	Active	1/1/51	

Click the Absence Reason Name

Absence Reasons

Search

Advanced Saved Search A

** Name ** Legislation

** Status * Effective As-of Date

Search Results

View Create End Date Delete Export

Name	Legislation	Status	Effective Start Date	Effective End Date
Illness	United States	Active	1/1/51	

Click **Edit** then **Update**

View Reason Illness

*Session Effective Date 9/28/22

Basic Details

Effective Start Date 1/1/51

Name Illness

Description

Effective End Date

Legislative Information

Context

Segment

Descriptive Information

Context

Segment

Legislation United States

Status Active

Management User-defined

Save Save and Close Cancel

Edit History

Update

Click Update

Update the applicable details and click **Save and Close**

Edit Absence Reason Illness

*Session Effective Date 9/28/22

Basic Details

Effective Start Date 1/1/51

*Name Illness

Description

Effective End Date

Legislative Information

Context

Segment

Descriptive Information

Context

Segment

Legislation United States

*Status Active

Management User-defined

Save Save and Close Cancel

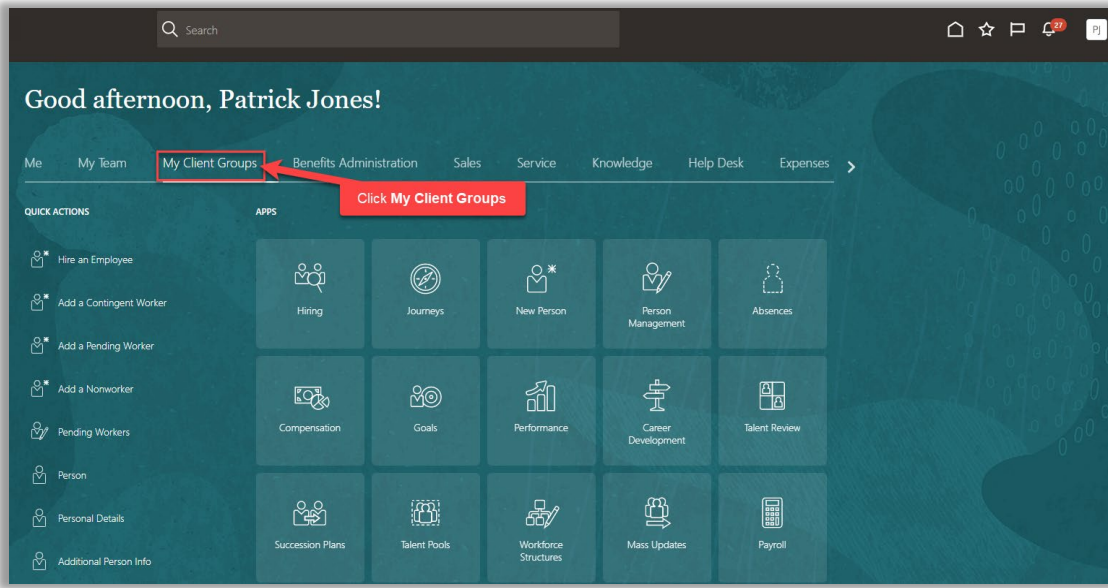
Click Save and Close

Update the applicable details

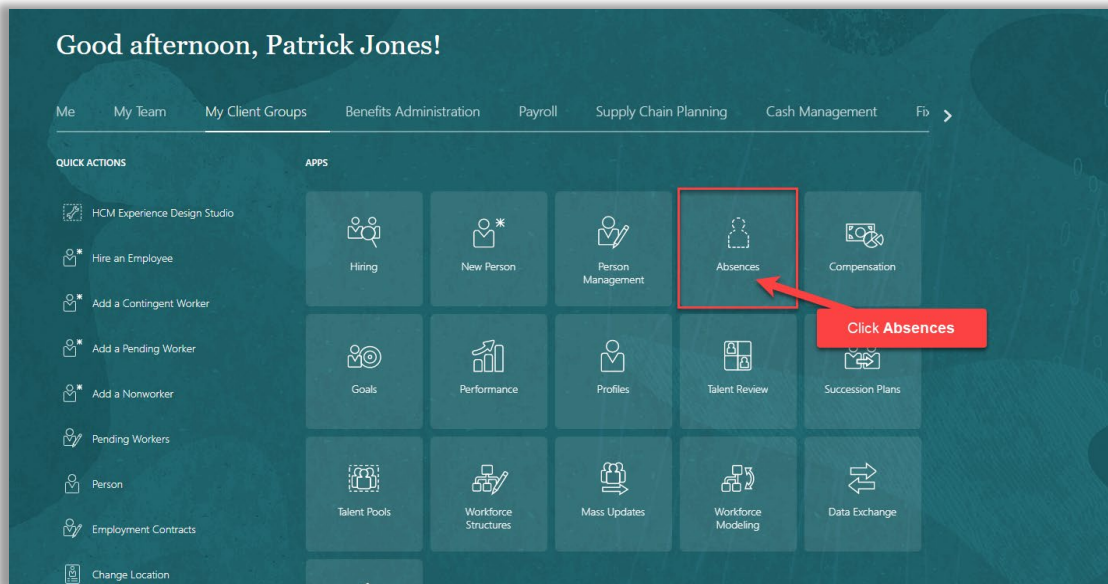
Manage Absence Plans

Navigation: Home>My Client Groups>Absences>Absence Plans>Edit>Submit

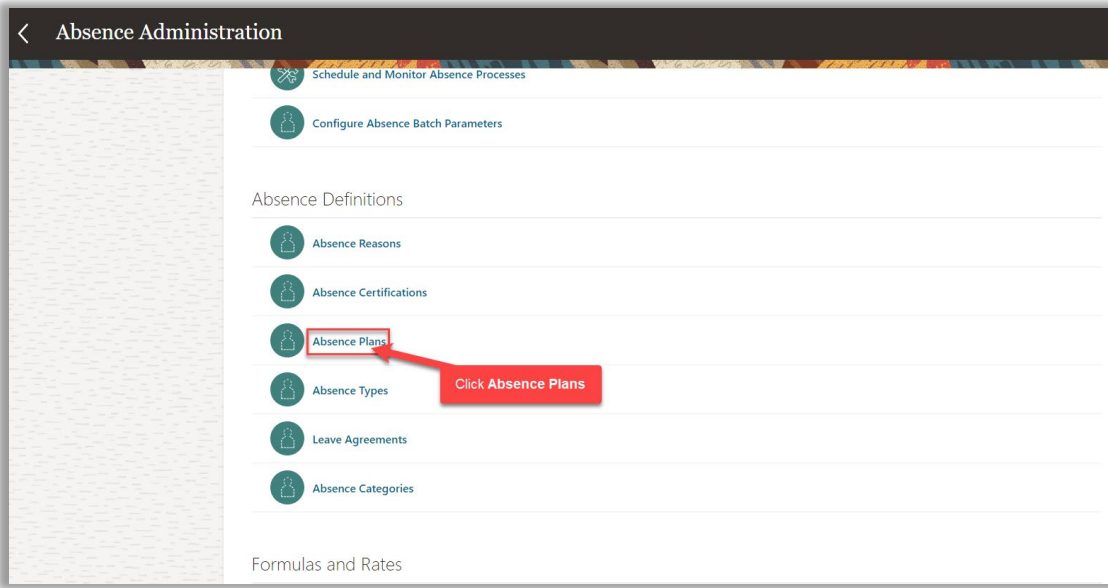
From the home screen, click **My Client Groups**



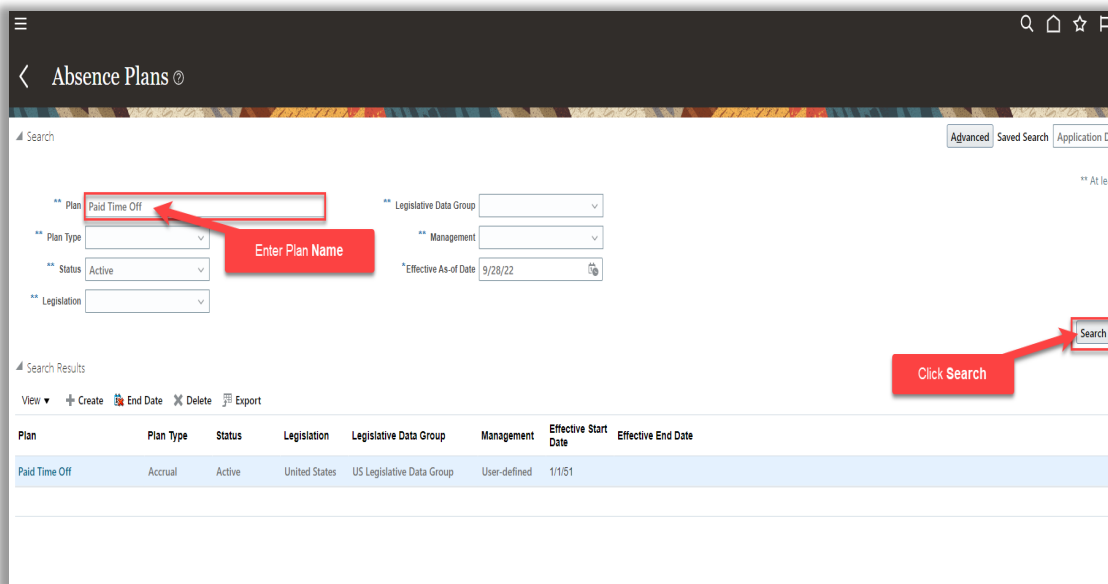
Next, click **Absences**



Scroll down and click **Absence Plans**. If preferred, we can also search the words **Absence Plans** in the Search box at the top



Enter the Absence Plans **Name** and click **Search**



Click **Absence Plan Name**

Absence Plans

Search

Advanced Saved Search Application D

** Plan Paid Time Off

** Plan Type

** Status Active

** Legislation

** Legislative Data Group

** Management

* Effective As-of Date 9/28/22

Search

Search Results

View Create End Date Delete Export

Plan	Plan Type	Status	Legislation	Legislative Data Group	Management	Effective Start Date	Effective End Date
Paid Time Off	Accrual	Active	United States	US Legislative Data Group	User-defined	1/1/51	

Click Name

Enter the **Session Effective Date** then, **Edit** and **Update**

View Plan Paid Time Off

Save Save and Close Cancel

* Session Effective Date 9/28/22

Enter Session Effective Date

Basic Details

Effective Start Date 1/1/51

Plan Type Accrual

Management User-defined

Effective End Date

Legislation United States

Click Update

Update

Plan Attributes Participation Accruals Entries and Balances Additional Details

General Attributes

Plan Paid Time Off

Legislative Data Group US Legislative Data Group

Status Active

✓ Enable concurrent entitlement

Processing Level Assignment

Conversion Formula

Plan Category

Plan UOM Hours

Alternative Schedule Category

Legislative Grouping Code

Plan Term

Type Anniversary year

Anniversary Event Rule Rehire date

Balance Display

Worker Balance Display

Manager Balance Display

Update the applicable details and click **Save and Close**

Session Effective Date: 9/28/22

Effective Start Date: 1/1/51

Effective End Date:

Plan Type: Accrual

Management: User-defined

Legislation: United States

Plan Attributes: General Attributes, Participation, Accruals, Entries and Balances, Additional Details

Plan: Paid Time Off

Description:

Plan UOM: Hours

Alternative Schedule Category:

Legislative Grouping Code:

Plan Term: Anniversary year

Status: Active

Enable concurrent entitlement: ☒

Processing Level: Assignment

Conversion Formula:

Plan Category:

Anniversary Event Rule: Rehire date

Balance Display:

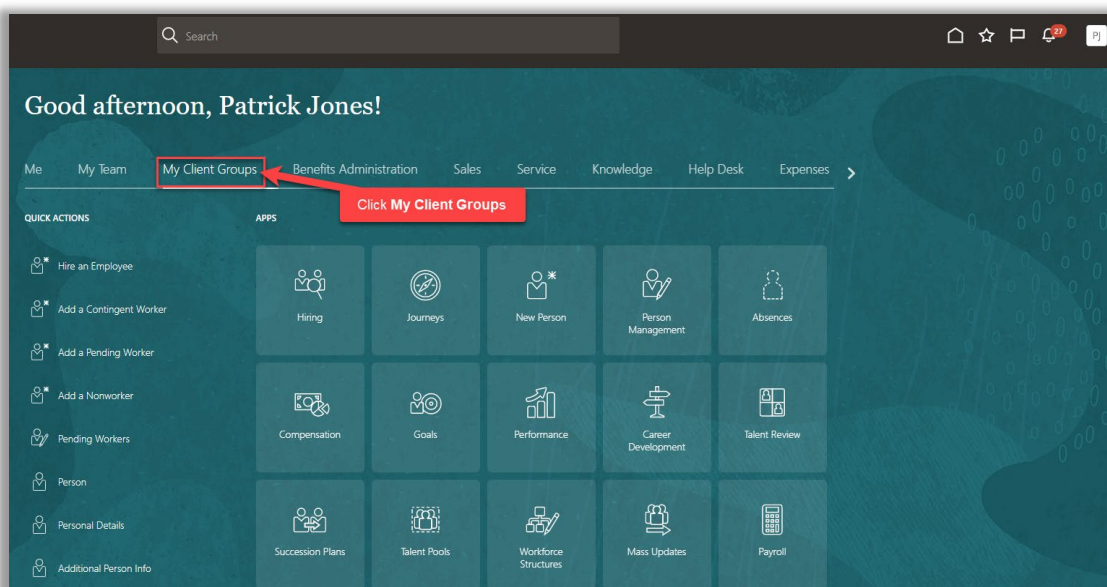
Click Save and Close

Update the applicable details

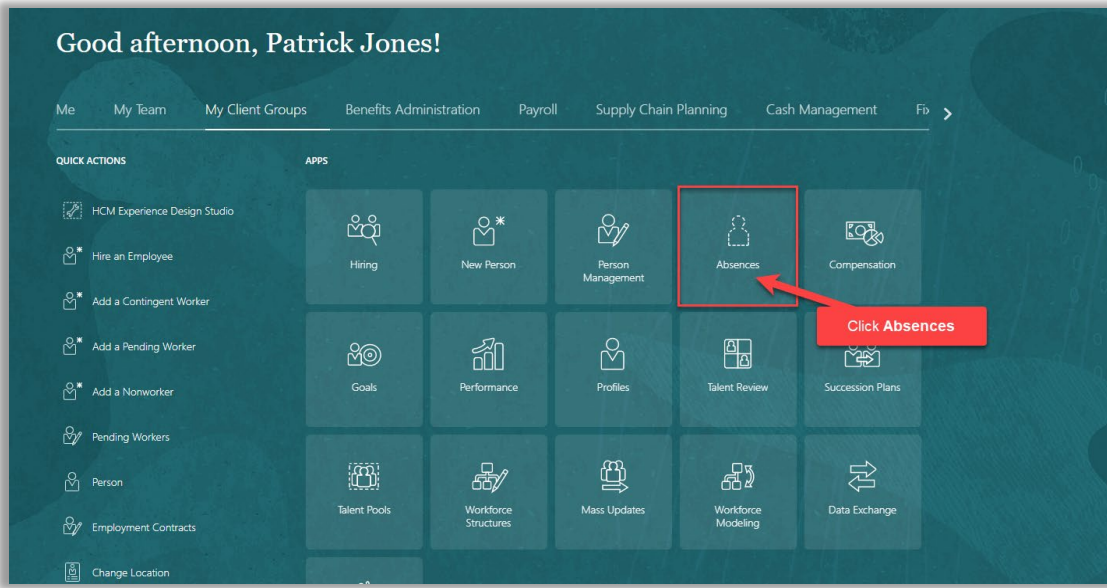
Add Absence Types

Navigation: Home>My Client Groups>Absences>Absence Types>Create>Submit

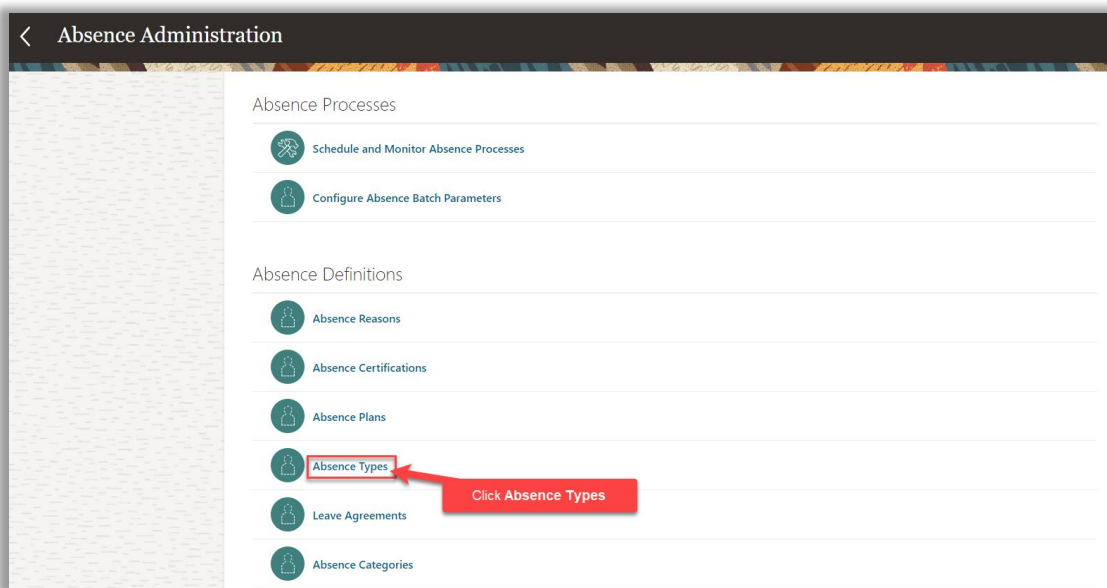
From the home screen, click **My Client Groups**



Next, click **Absences**



Scroll down and click **Absence Types**. If preferred, we can also search the words **Absence Types** in the Search box at the top



Click **Create**

Absence Types

Search

Advanced Saved Search Application Default

** Name

** Status **Active**

** Legislation

** Legislative Data Group

** Management

* Effective As-of Date 9/28/22

Search

Search Results

View **Create** End Date Delete Export

Name **Pattern** **Status** **Management** **Legislation** **Effective Start Date**

No data to display.

Click Create

Enter the **Effective As-of Date**, the **Legislation** and **Pattern** will default. These can be updated, if needed. Click **Continue**

Absence Types

Search

Advanced Saved Search Application Default

** Name

** Status **Active**

** Legislation

** Legislative Data Group

** Management

* Effective As-of Date 9/28/22

Search Reset

Search Results

View **Create** End Date Delete Export

Name **Pattern** **Status** **Management** **Legislation** **Effective Start Date** **Effective End Date**

No data to display.

Create Absence Type

* Effective As-of Date 9/28/22

* Legislation United States

* Pattern Generic absence

Continue **Cancel**

Enter Effective As-of Date

Click Continue

Enter the required information in each tab for the new **Absence Type**. On the **Type Attributes** Tab, enter the **Name**, **Legislative Data Group**, and change the **Status** to **Active**

Create Absence Type Save Save and Close

Basic Details

Effective Start Date: 9/28/22
 Pattern: Generic absence
 Management: User-defined
 Effective End Date:
 Legislation: United States

Type Attributes | Plans and Reasons | Display Features | Action Items | Additional Details

General Attributes

*Name: Enter Name
 Description:
 *UOM:
 *Legislative Data Group: Enter Legislative Data Group
 *Status: Change Status to Active
 Conversion Formula:
 Validation Formula:
 Eligibility Profile:
 Legislative Grouping Code:
☐ Display balance in approval notification

Duration Rules

Minimum Duration Alert:
 Maximum Duration Alert:
 *Maximum Duration:
 *Partial Day Rule:
 Schedule Hierarchy Start Point:

Open-Ended Absence Rules

Enter the applicable information in each of the remaining tabs

Create Absence Type Save Save and Close

Session Effective Date: 9/28/22

Basic Details

Effective Start Date: 9/28/22
 Pattern: Generic absence
 Management: User-defined
 Effective End Date:
 Legislation: United States

Type Attributes | **Plans and Reasons** | Display Features | Action Items | Additional Details

Absence Plans

View

*Plan	*Status	Priority	Concurrent	Effective Start Date
No data to display.				

Absence Reasons

View

*Reason	Linkage Reason	Default	Effective Start Date
No data to display.			

Click **Save and Close**

Session Effective Date 9/28/22

Create Absence Type

Save and Close

Click Save and Close

Basic Details

Effective Start Date 9/28/22

Pattern Generic absence

Management User-defined

Effective End Date

Legislation United States

Type Attributes Plans and Reasons Display Features Action Items Additional Details

Absence Plans

View Select and Add Edit End Date Delete

Plan	Status	Priority	Concurrent	Effective Start Date
No data to display.				

Absence Reasons

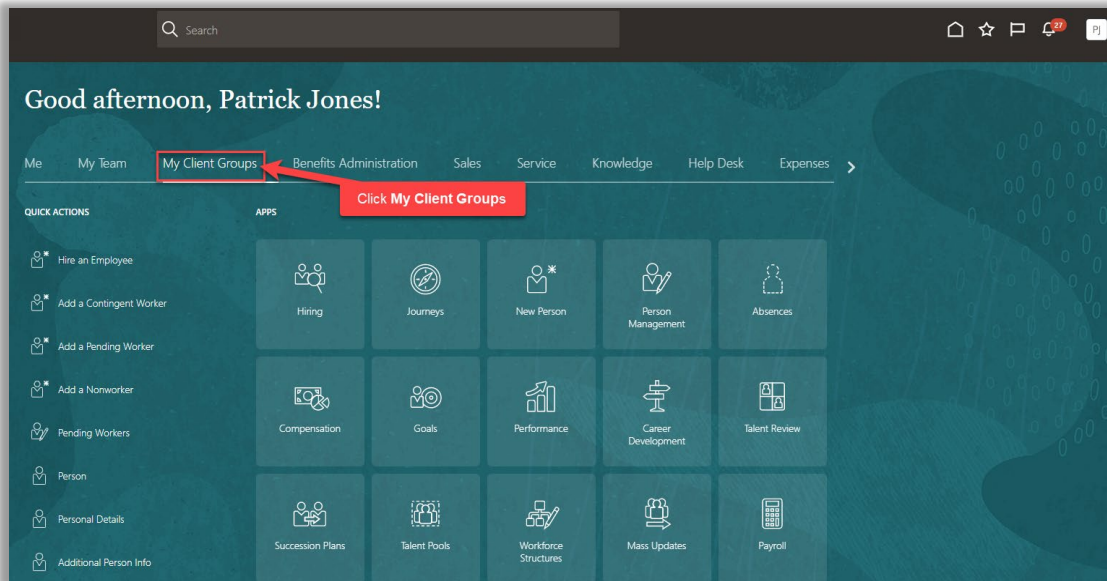
View Select and Add Edit End Date Delete

Reason	Linkage Reason	Default	Effective Start Date
No data to display.			

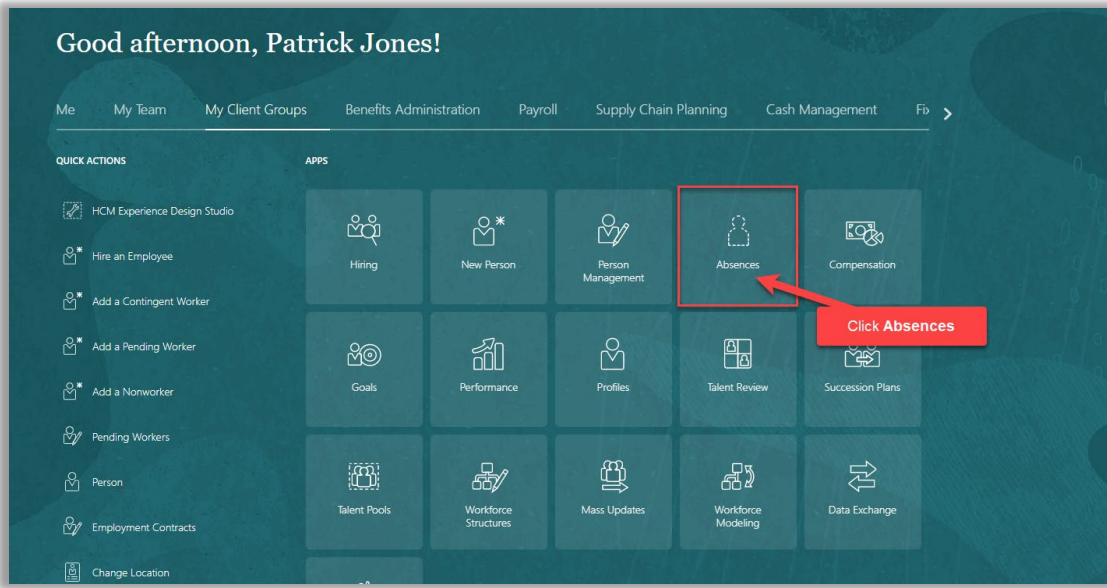
Manage Absence Types

Navigation: Home>My Client Groups>Absences>Absence Types>Search>Update>Submit

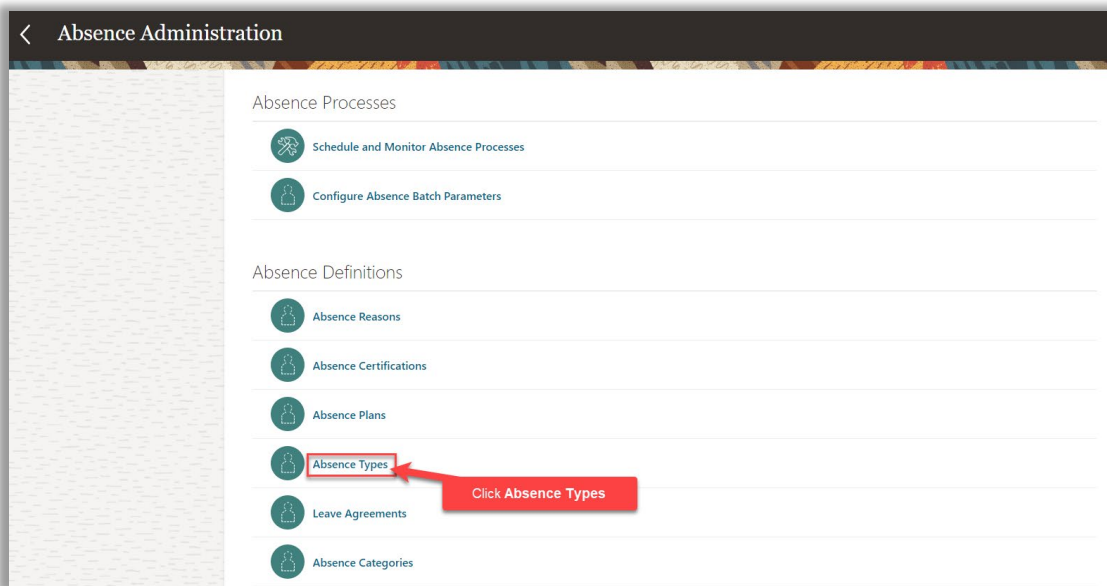
From the home screen, click **My Client Groups**



Next, click **Absences**



Scroll down and click **Absence Types**. If preferred, we can also search the words **Absence Types** in the Search box at the top



Enter the **Absence Type Name** and click **Search**

Absence Types

Search

Advanced Saved Search Application D

** Name **Enter Name**

** Status

** Legislation

** Legislative Data Group

** Management

* Effective As-of Date

Search **Click Search**

Search Results

View Create End Date Delete Export

Name	Pattern	Status	Management	Legislation	Effective Start Date
Paid Time Off	Generic abse...	Active	User-defined	United States	1/1/51

Click Absence Types Name

Absence Types

Search

Advanced

** Name

** Status

** Legislation

** Legislative Data Group

** Management

* Effective As-of Date

Search Results

View Create End Date Delete Export

Name	Pattern	Status	Management	Legislation
Paid Time Off	Generic abse...	Active	User-defined	United States

Click Name

Enter the **Session Effective Date** then, **Edit** and **Update**

View Type Paid Time Off

Session Effective Date: 9/28/22

Basic Details

Effective Start Date: 1/1/51
 Pattern: Generic absence
 Management: User-defined

Effective End Date: Legislation: United States

Type Attributes | Plans and Reasons | Display Features | Action Items | Additional Details

General Attributes

Name: Paid Time Off
 Description:
 UOM: Hours
 Legislative Data Group: US Legislative Data Group
 Status: Active

Conversion Formula:
 Validation Formula:
 Eligibility Profile: EWT Absence Plan Eligibility
 Legislative Grouping Code: — Display balance in approval notification

Duration Rules

Minimum Duration Alert: None
 Maximum Duration Alert: Error
 Maximum Duration: 4,160

Partial Day Rule: Unlimited
 Schedule Hierarchy Start Point:

Open-Ended Absence Rules

— Evaluate absences for schedule changes
 Evaluation Period at Absence Entry: 365 Calendar days

Update the applicable details and click **Save and Close**

Edit Absence Type Paid Time Off

Session Effective Date: 9/28/22

Basic Details

Effective Start Date: 1/1/51
 Pattern: Generic absence
 Management: User-defined

Effective End Date: Legislation: United States

Type Attributes | Plans and Reasons | Display Features | Action Items | Additional Details

General Attributes

*Name: Paid Time Off
 Description:
 UOM: Hours
 *Legislative Data Group: US Legislative Data Group
 *Status: Active

Conversion Formula:
 Validation Formula:
 Eligibility Profile: EWT Absence Plan Eligibility
 Legislative Grouping Code: — Display balance in approval notification

Duration Rules

Minimum Duration Alert: None
 Maximum Duration Alert: Error
 *Maximum Duration: 4,160

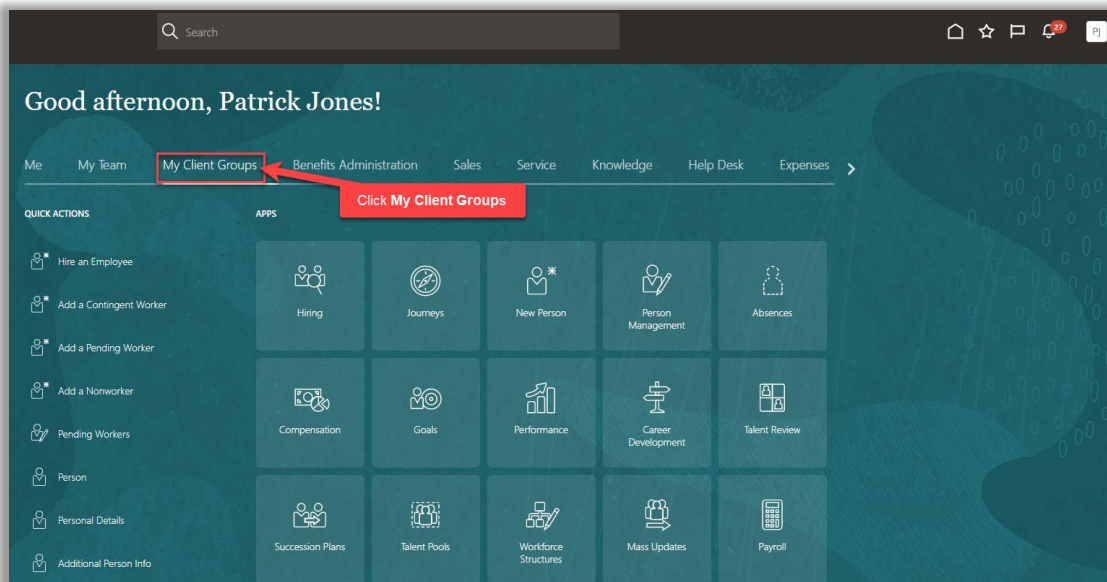
*Partial Day Rule: Unlimited
 Schedule Hierarchy Start Point:

Open-Ended Absence Rules

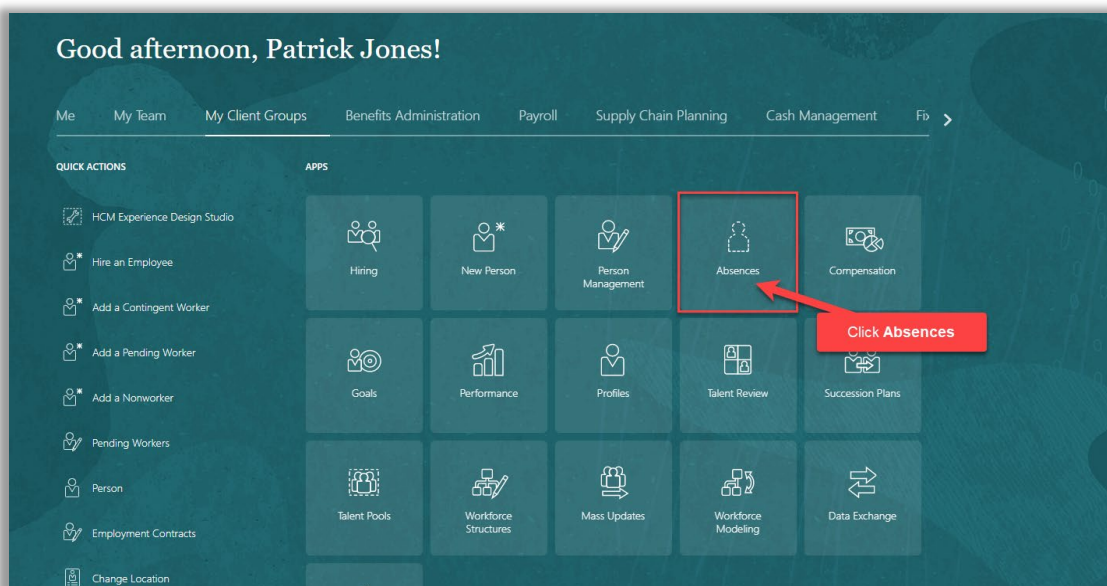
Manage Repeating Time Periods

Navigation: Home>My Client Groups>Absences>Repeating Time Periods>Update>Submit

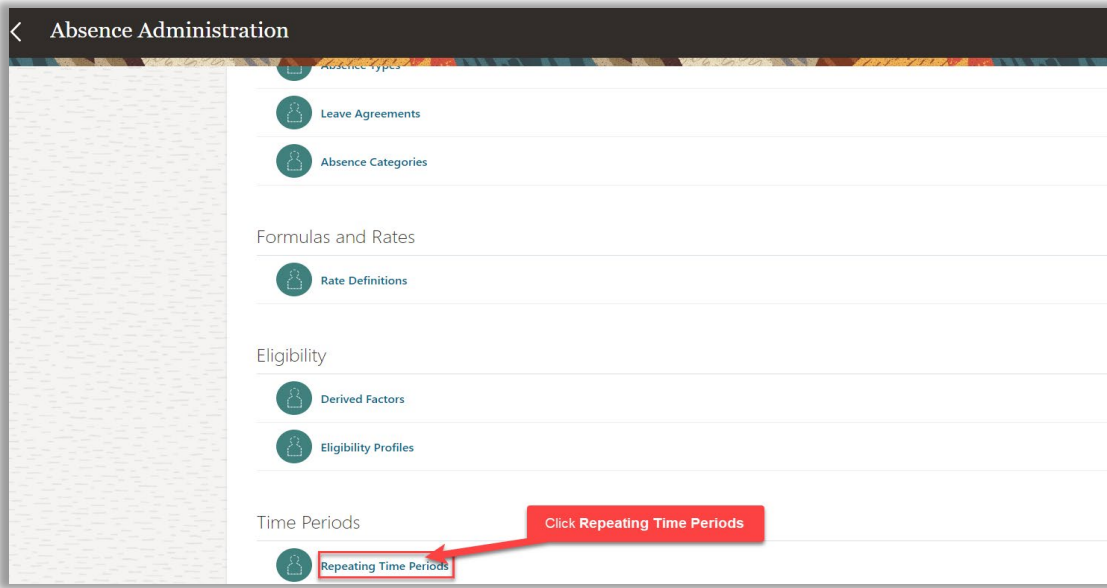
From the home screen, click **My Client Groups**



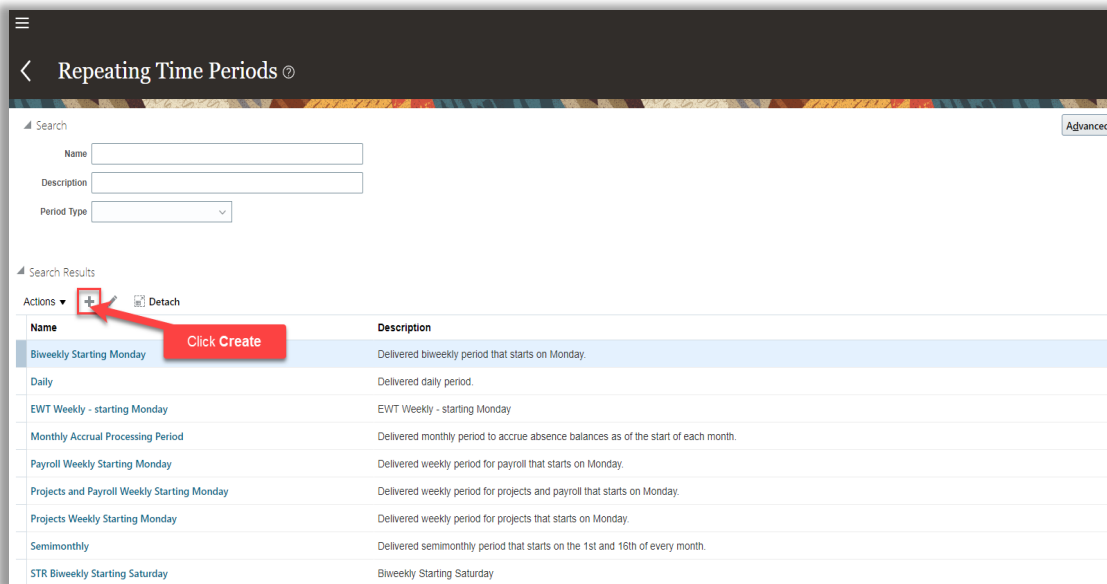
Next, click **Absences**



Scroll down and click **Repeating Time Periods**. If preferred, we can also search the words **Repeating Time Periods** in the Search box at the top



From the Repeating Time Periods Screen, we can create a new Repeating Time Period or manage existing Repeating Time Periods. We'll create a **Repeating Time Period** by clicking **Create**



Enter the **Name**, **Period Usage**, **Period Type**, **Period Length**, and **Sample Start Date**

The screenshot shows the 'Create Repeating Time Period' form. Annotations with red arrows point to the following fields:

- Name:** 'Monthly Accrual' (Annotated with 'Enter Name')
- Period Usage:** A group of checkboxes including 'Time Card', 'Approval', 'Accrual Processing' (checked), 'Overtime', and 'Balances' (Annotated with 'Select Period Usage')
- Period Type:** 'Monthly' (Annotated with 'Select Type, Length, and Start Date')
- Period Length:** 'Calendar month' (Annotated with 'Select Type, Length, and Start Date')
- Sample Start Date:** '9/1/22' (Annotated with 'Select Type, Length, and Start Date')

Other visible fields include 'Description', 'Preview Period Start Date', 'Preview Period End Date', and a 'Preview Time Periods' button. A 'Save and Close' button is in the top right corner.

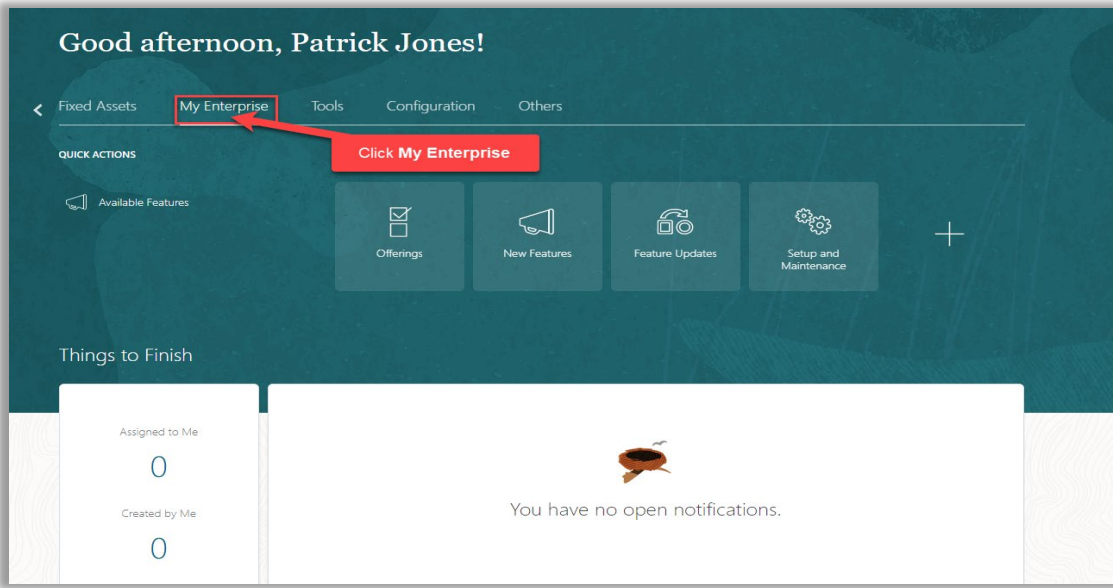
Click **Save and Close**

This screenshot is identical to the previous one, but with a red box and an arrow highlighting the 'Save and Close' button in the top right corner. The annotation 'Click Save and Close' points to this button.

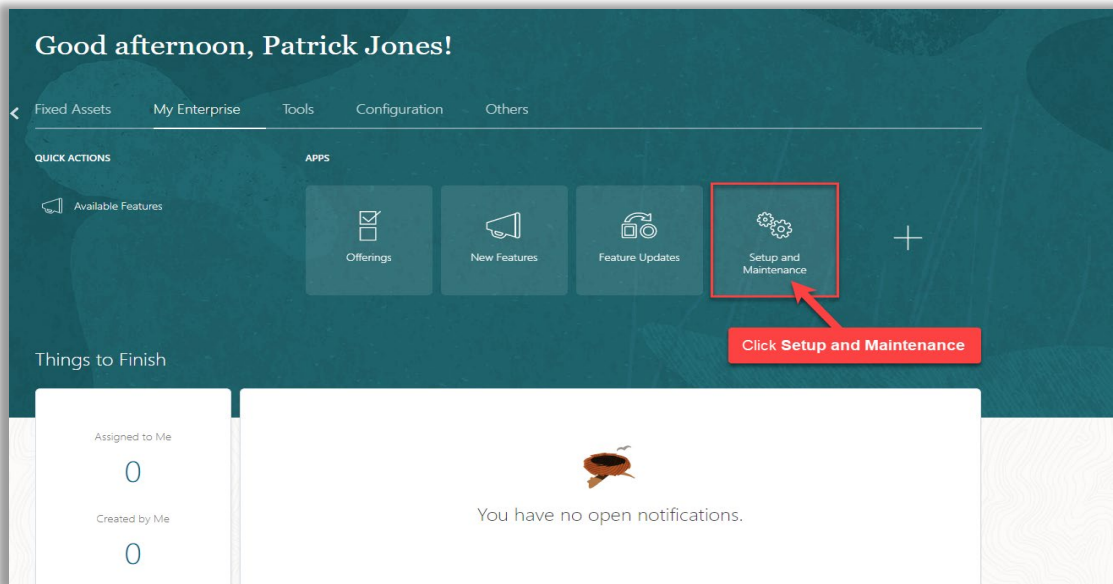
Absence Fast Formulas

Navigation: Home>My Enterprise>Setup and Maintenance>Task>Search>Search Fast Formulas

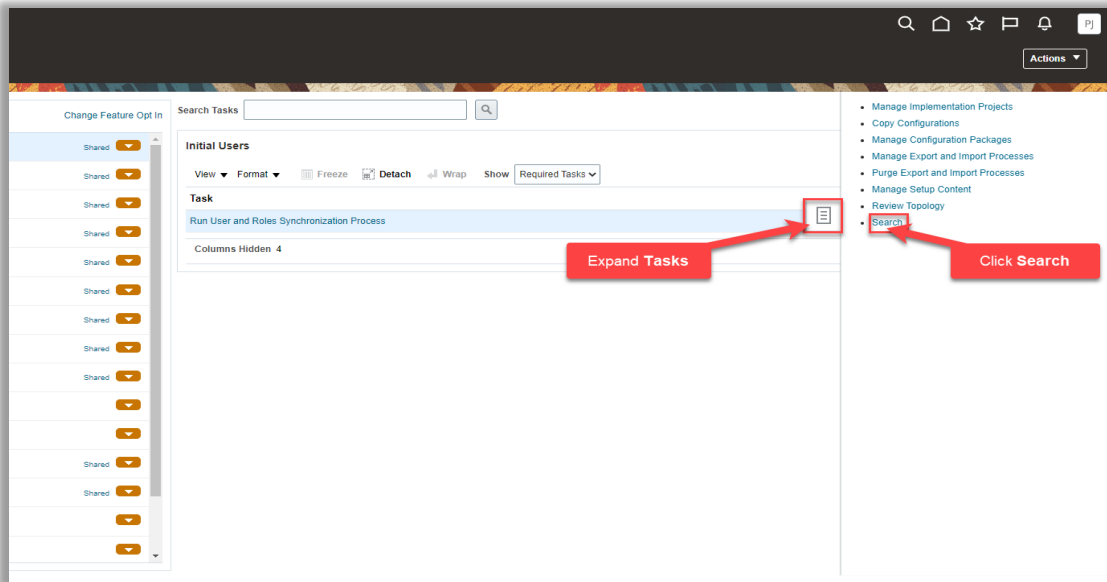
From the home screen, click **My Enterprise**



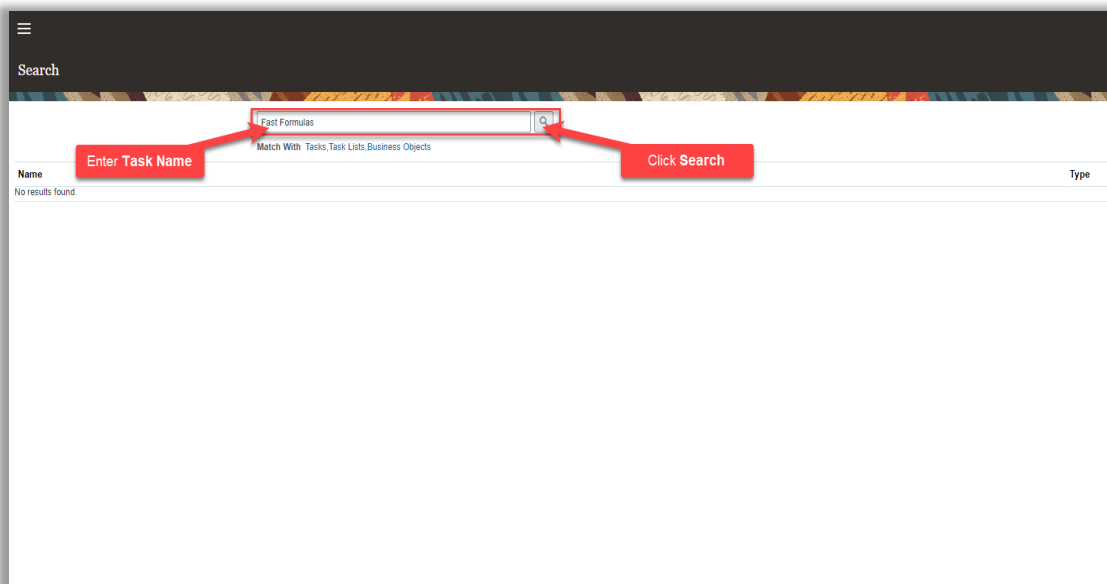
Click **Setup and Maintenance**



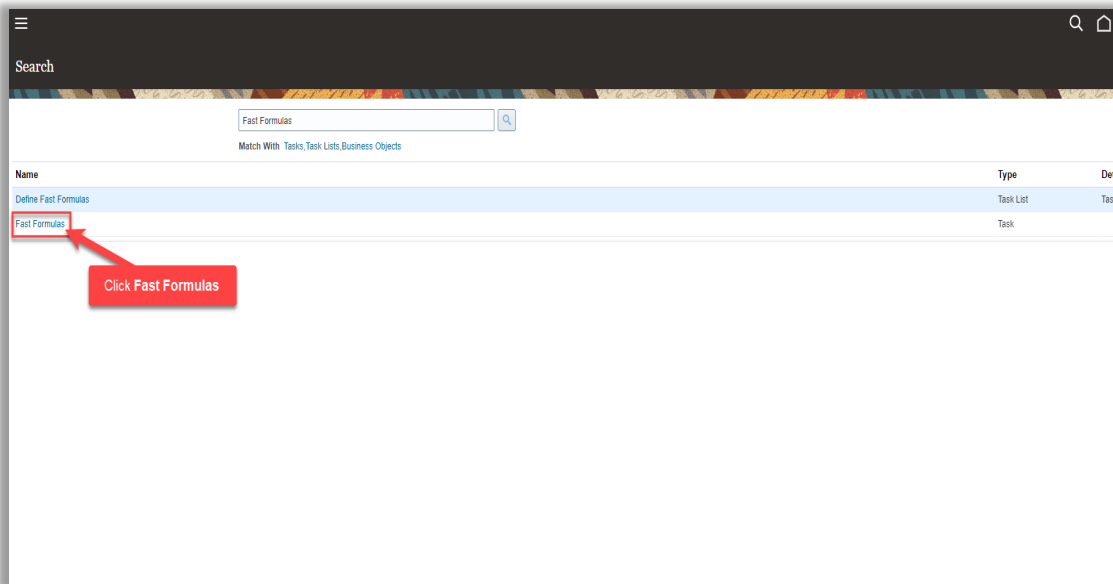
Expand the **Tasks** and click **Search**



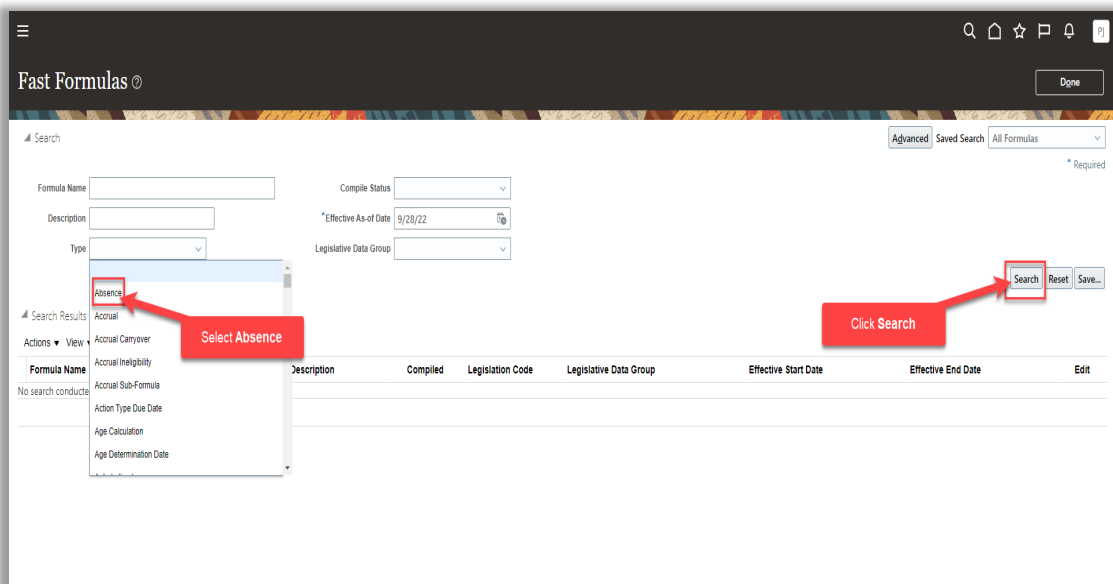
Enter Task Name **Fast Formulas** in the search bar and click **Search**



Click **Fast Formulas**



From the type drop down, select **Absences**, and click **Search**



Below we can review the Absence related Fast Formulas

Fast Formulas

Search

Formula Name: Compile Status:

Description: *Effective As-of Date: 1/1/51

Type: Absence Legislative Data Group: US Legislative Data Group

Review the below Fast Formulas

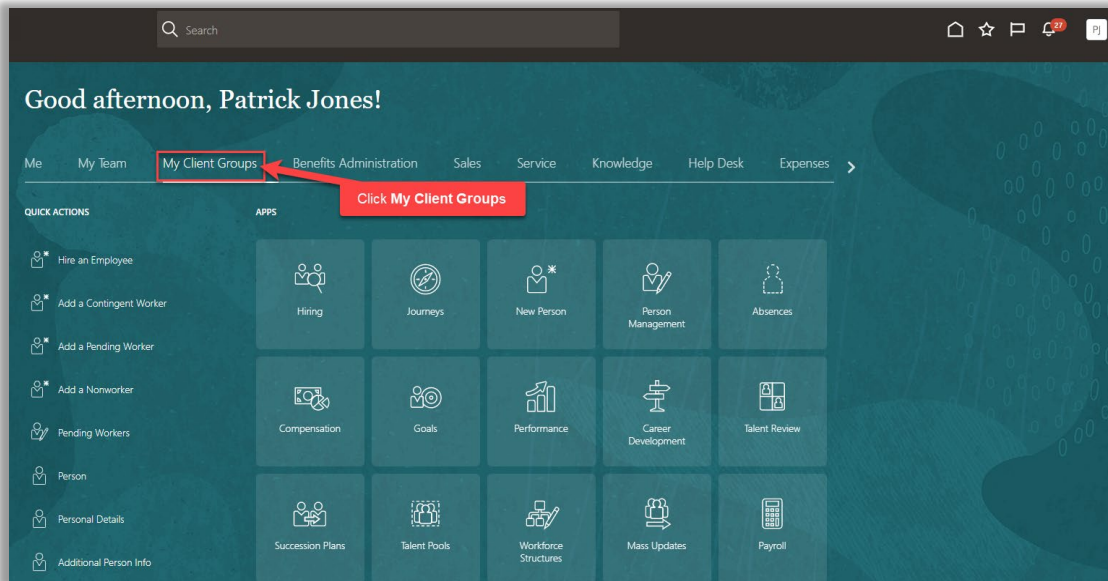
Search Results

Formula Name	Type	Description	Compiled	Legislation Code	Legislative Data Group	Effective Start D
GLB_DEDN_CBID_AUTOINDIRECT	Auto In...		✓			1/1/01
GLB_DEDN_PRORATION	Payroll ...		✓			1/1/01
GLB_DEDN_DUMMY_GUARANTEED_NET	Oracle P...		✓			1/1/01
GLB_DEDN_CALCULATOR	Oracle P...		✓			1/1/01
Transfer Incentive Compensation to Payroll	Batch Lo...	Transfer Incentive Co...	✓			1/1/00
GLB_DEDN_TOTAL_OWED	Oracle P...		✓			1/1/01
GLB_DEDN_WSA	Oracle P...		✓			1/1/01
US e-IWO Outbound Validation Rule	Extract ...		✓	US		1/1/01
e-IWO Processing Overrides Formula	Oracle P...		✓	US		1/1/01
US e-IWO Y or N Validation	User Tab...		✓	US		1/1/01

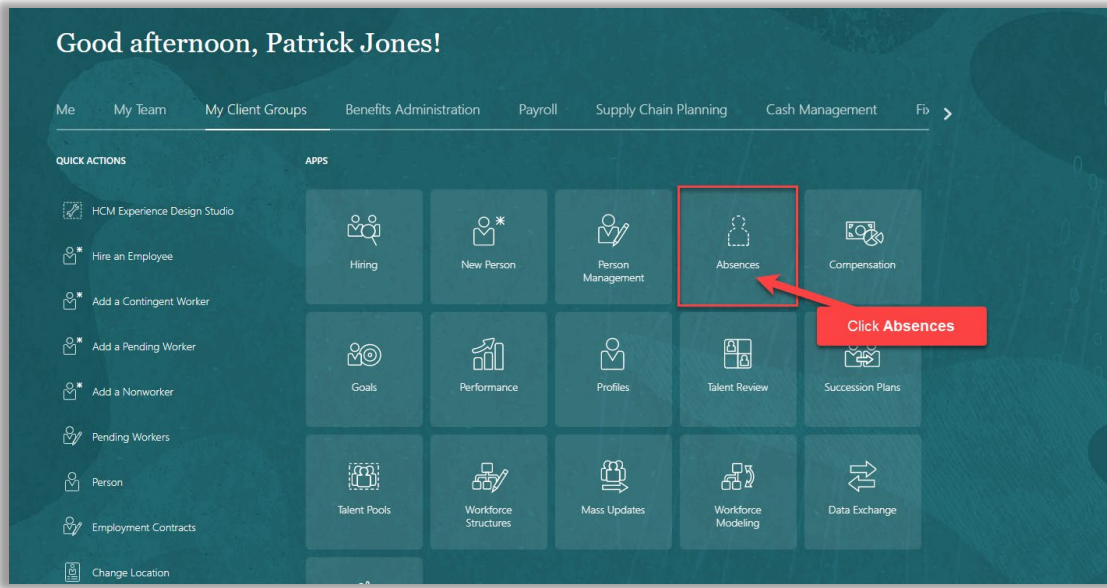
Control Absence Approvals For HR Initiated Transactions

Navigation: Home>My Client Groups>Absences>Absence Types>Search>Update>Submit

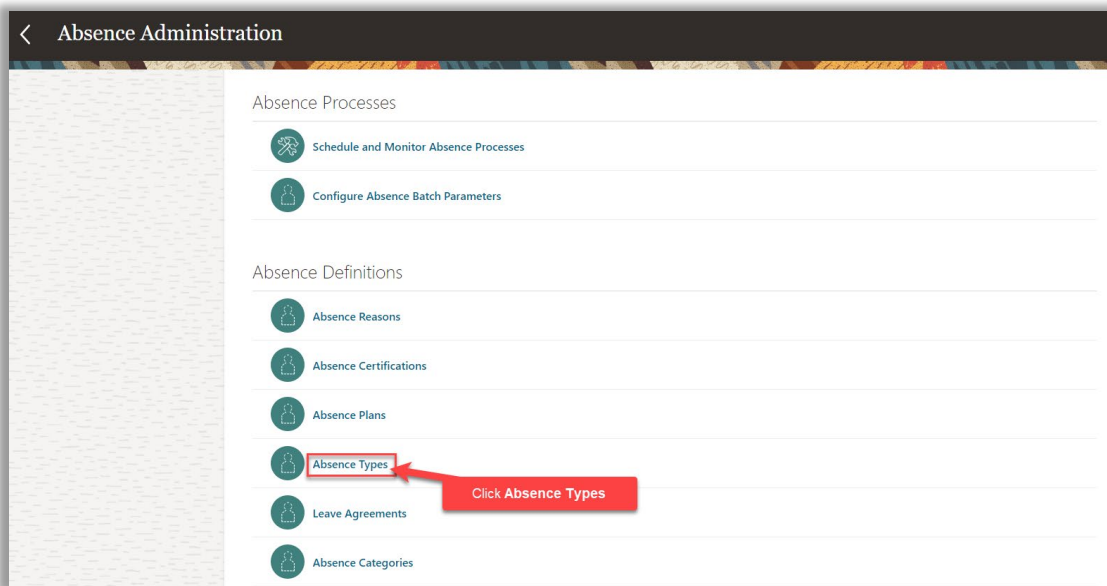
From the home screen, click **My Client Groups**



Next, click **Absences**



Scroll down and click **Absence Types**. If preferred, we can also search the words **Absence Types** in the Search box at the top



Enter the **Absence Type Name** and click **Search**

Absence Types

Search

Advanced Saved Search Application D

** Name **Enter Name**

** Status

** Legislation

** Legislative Data Group

** Management

* Effective As of Date

Search **Click Search**

Search Results

View Create End Date Delete Export

Name	Pattern	Status	Management	Legislation	Effective Start Date
Paid Time Off	Generic abse...	Active	User-defined	United States	1/1/51

Click Absence Types Name

Absence Types

Search

Advanced

** Name

** Status

** Legislation

** Legislative Data Group

** Management

* Effective As of Date

Search Results

View Create End Date Delete Export

Name	Pattern	Status	Management	Legislation
Paid Time Off	Generic abse...	Active	User-defined	United States

Click Name

Enter the **Session Effective Date** then, **Edit** and **Update**

View Type Paid Time Off

Session Effective Date: 9/28/22

Basic Details

Effective Start Date: 1/1/51

Effective End Date: Legislation United States

Pattern: Generic absence

Management: User-defined

Type Attributes

General Attributes

Name: Paid Time Off

Description:

UOM: Hours

Legislative Data Group: US Legislative Data Group

Status: Active

Conversion Formula:

Validation Formula:

Eligibility Profile: EWT Absence Plan Eligibility

Legislative Grouping Code:

Display balance in approval notification

Duration Rules

Minimum Duration Alert: None

Maximum Duration Alert: Error

Maximum Duration: 4,160

Partial Day Rule: Unlimited

Schedule Hierarchy Start Point:

Open-Ended Absence Rules

Evaluate absences for schedule changes

Evaluation Period at Absence Entry: 365 Calendar days

Click the **Display Features** tab and click **Actions** then **Update**

View Type Paid Time Off

Session Effective Date: 9/28/22

Basic Details

Effective Start Date: 1/1/51

Effective End Date: Legislation United States

Pattern: Generic absence

Management: User-defined

Type Attributes

Plans and Reasons

Display Features

Action Items

Additional Details

Sections

Primary Absence Details

Employees

Managers

Administrators

Usage	Usage Type	Employee Self-Service	Manager Self-Service	Administrative Transaction
Comments	Field	Display and ...	Display and ...	Display and ...
Attachments	Field	Not enabled	Not enabled	Not enabled
Reason	Field	Do not display	Do not display	Do not display

Qualified Entitlements

Employees

Managers

Administrators

Scroll down and under **Approval and Processing Rules**, across from **Approval Processing**, we can **Enable** or **Not Enable** Approvals. Under Administrative Transaction, **Not Enabled** will remove any approvals for HR Initiated Leave Requests

Edit Absence Type Paid Time Off Save Save and Close Cancel

Qualified Entitlements

☐ Employees ☐ Managers ☐ Administrators

Usage

No data to display.

Approval and Processing Rules

☒ Employees ☒ Managers ☒ Administrators

Usage	Usage Type	Employee Self-Service	Manager Self-Service	Administrative Transaction
Concurrency	Rule	Not enable	Not enable	Not enable
Deferred processing on subsequent absences	Rule	Not enable	Not enable	Not enable
Additional payload attribute	Rule	Not specifi	Not specifi	Not specifi
Approvals reset on update	Rule	Enabled	Not enable	Not enable
Approval processing	Rule	Enabled	Not enable	Not enable
Deferred processing on initial entry	Rule	Not enable	Not enable	Not enable

Projected Balances

☒ Employees ☒ Managers ☒ Administrators

Select Not Enabled

Click **Save and Close**

Edit Absence Type Paid Time Off Save Save and Close Cancel

Click Save and Close

Qualified Entitlements

☐ Employees ☐ Managers ☐ Administrators

Usage

No data to display.

Approval and Processing Rules

☒ Employees ☒ Managers ☒ Administrators

Usage	Usage Type	Employee Self-Service	Manager Self-Service	Administrative Transaction
Concurrency	Rule	Not enable	Not enable	Not enable
Deferred processing on subsequent absences	Rule	Not enable	Not enable	Not enable
Additional payload attribute	Rule	Not specifi	Not specifi	Not specifi
Approvals reset on update	Rule	Enabled	Not enable	Not enable
Approval processing	Rule	Enabled	Not enable	Not enable
Deferred processing on initial entry	Rule	Not enable	Not enable	Not enable

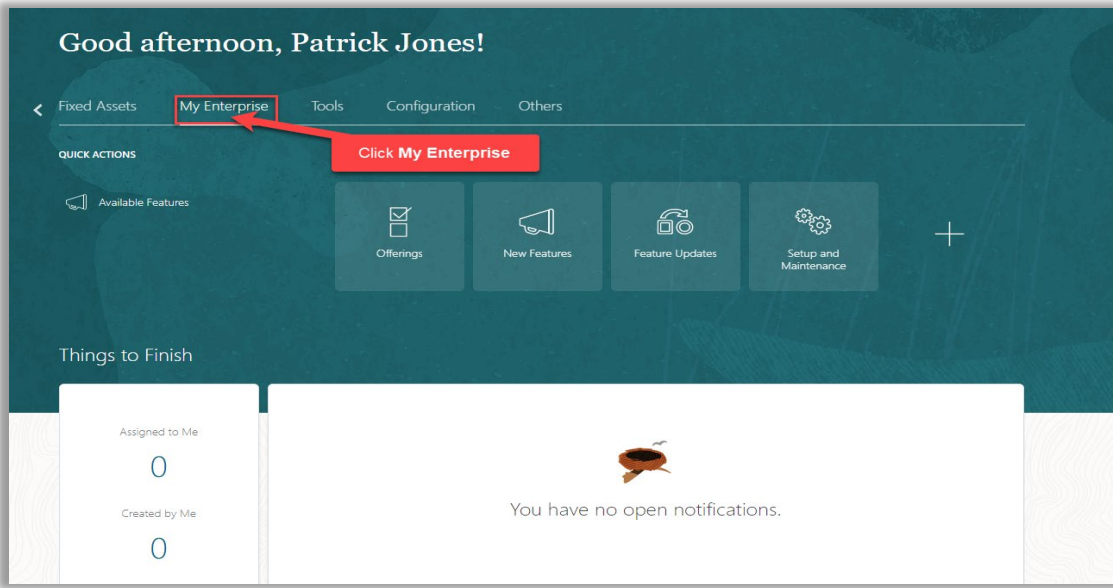
Projected Balances

☒ Employees ☒ Managers ☒ Administrators

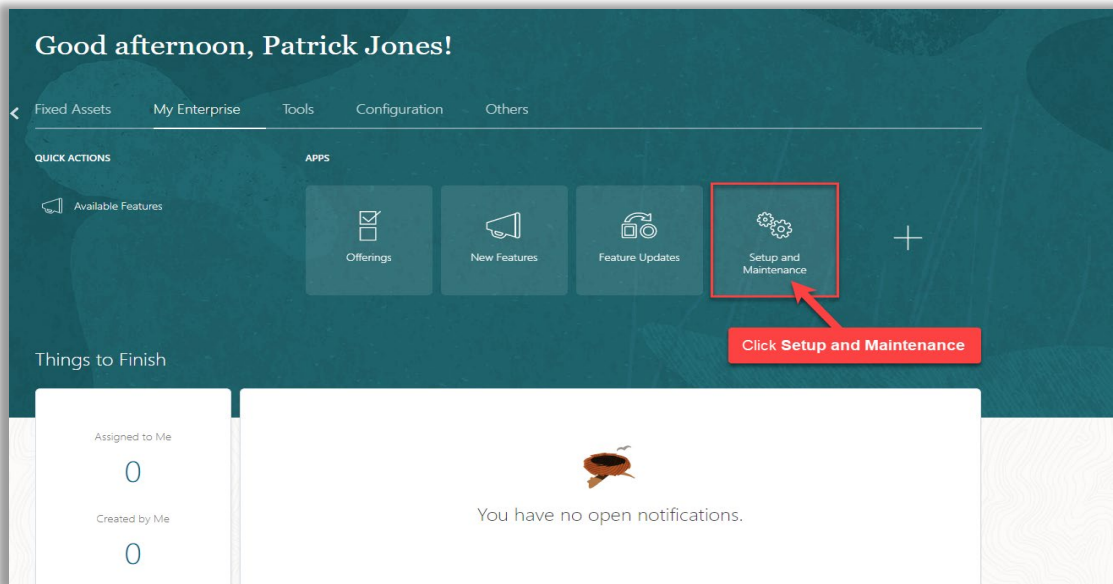
Add Absence Plan Balance Adjustment Reasons

Navigation: Home>My Enterprise>Setup and Maintenance>Task>Search>Search Global Absences Lookups>Select>Update>Submit

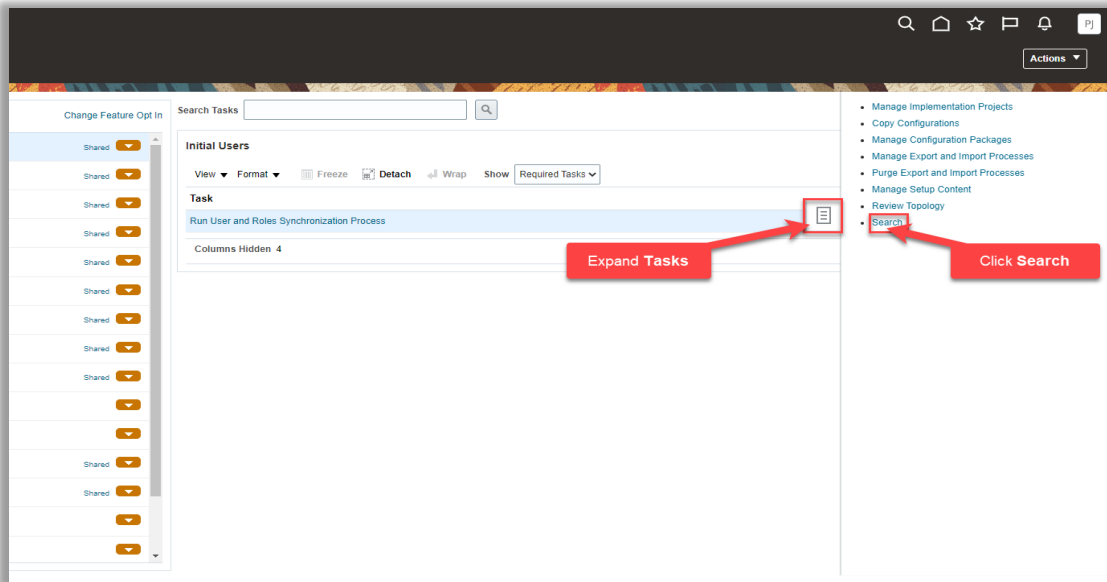
From the home screen, click **My Enterprise**



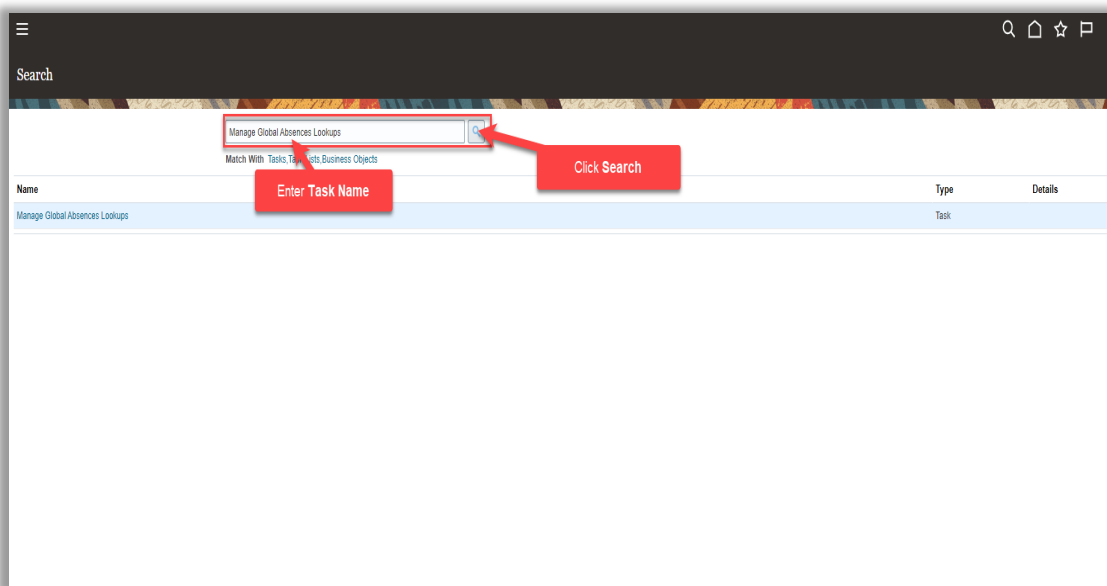
Click **Setup and Maintenance**



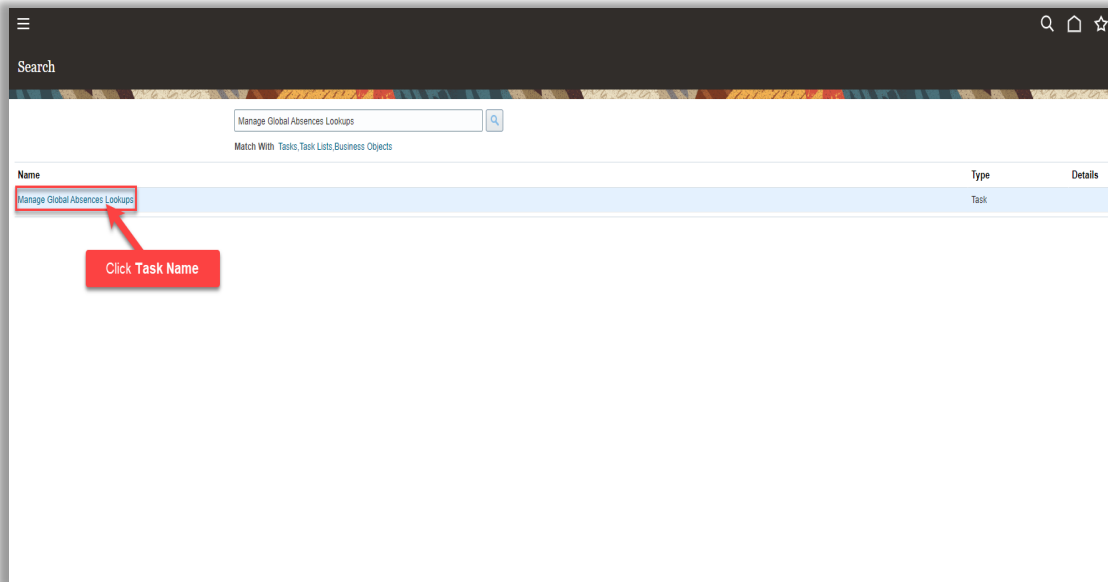
Expand the **Tasks** and click **Search**



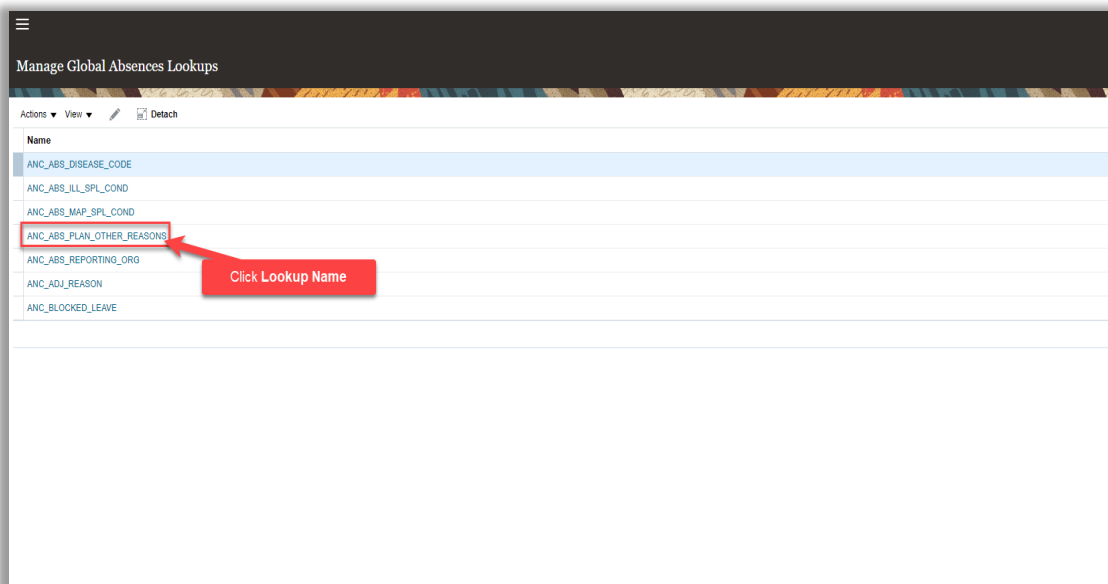
Enter Task Name **Manage Global Absences Lookups** in the search bar and click **Search**



Click **Manage Global Absences Lookup**



Click **ANC_ABS_PLAN_OTHER_REASONS**



Click + to add a New Balance Adjustment Reason. Enter the **Lookup Code**, **Start Date**, **Meaning**, and **Description**

Manage Global Absences Lookups ?

Common Lookup Type

Actions View Format + X Freeze Detach Wrap

Lookup Type	Meaning	Description	Module	Lookup Configuration Level	REST Access Secured
ANC_ABS_PLAN_OTHER_REAS...	Absences plan other reasons	Absence Plan Entry Other reasons	Global Absences	Extension	Secure

ANC_ABS_PLAN_OTHER_REAS... Click +

Actions View Format + X Freeze Detach Wrap

Enter Applicable Information

Lookup Code	Display Sequence	Enabled	Start Date	End Date	Meaning	Description	Tag
EWT_COVID_EXPIRED		<input checked="" type="checkbox"/>	1/1/1951	mid/yyyy	COVID Leave	Expired Leave Hours	
CE	0	<input checked="" type="checkbox"/>	1/1/0001	12/31/4712	Clerical Error	Clerical Error Plan Absence	
CP	0	<input checked="" type="checkbox"/>	1/1/0001	12/31/4712	Compensatory	Compensatory Reason	
EWT_IN_LOAD		<input checked="" type="checkbox"/>	1/1/1951	12/31/4712	Absences plan other reasonsAbsen		
EWT_LEAVE_DONATION		<input checked="" type="checkbox"/>	1/1/1951	12/31/4712	Leave Donation	Leave Donation Plan	
EWT_LUMPSUM		<input checked="" type="checkbox"/>	1/1/1951	12/31/4712	Lumpsum upon New Hire		
EWT_PARTIAL_DISB		<input checked="" type="checkbox"/>	1/1/1951	12/31/4712	Partial Discretionary Payout		
EWT_SICK_LEAVE_PAY...		<input checked="" type="checkbox"/>	1/1/1951	12/31/4712	Sick Leave Payout		
EWT_VACATION_PAYOUT		<input checked="" type="checkbox"/>	1/1/1951	12/31/4712	Vacation Payout		

Click **Save and Close**

Manage Global Absences Lookups ?

Common Lookup Type

Actions View Format + X Freeze Detach Wrap

Lookup Type	Meaning	Description	Module	Lookup Configuration Level	REST Access Secured
ANC_ABS_PLAN_OTHER_REAS...	Absences plan other reasons	Absence Plan Entry Other reasons	Global Absences	Extension	Secure

ANC_ABS_PLAN_OTHER_REASONS: Lookup Codes

Actions View Format + X Freeze Detach Wrap

Lookup Code	Display Sequence	Enabled	Start Date	End Date	Meaning	Description	Tag
EWT_COVID_EXPIRED		<input checked="" type="checkbox"/>	1/1/1951	mid/yyyy	COVID Leave	Expired Leave Hours	
CE	0	<input checked="" type="checkbox"/>	1/1/0001	12/31/4712	Clerical Error	Clerical Error Plan Absence	
CP	0	<input checked="" type="checkbox"/>	1/1/0001	12/31/4712	Compensatory	Compensatory Reason	
EWT_IN_LOAD		<input checked="" type="checkbox"/>	1/1/1951	12/31/4712	Absences plan other reasonsAbsen		

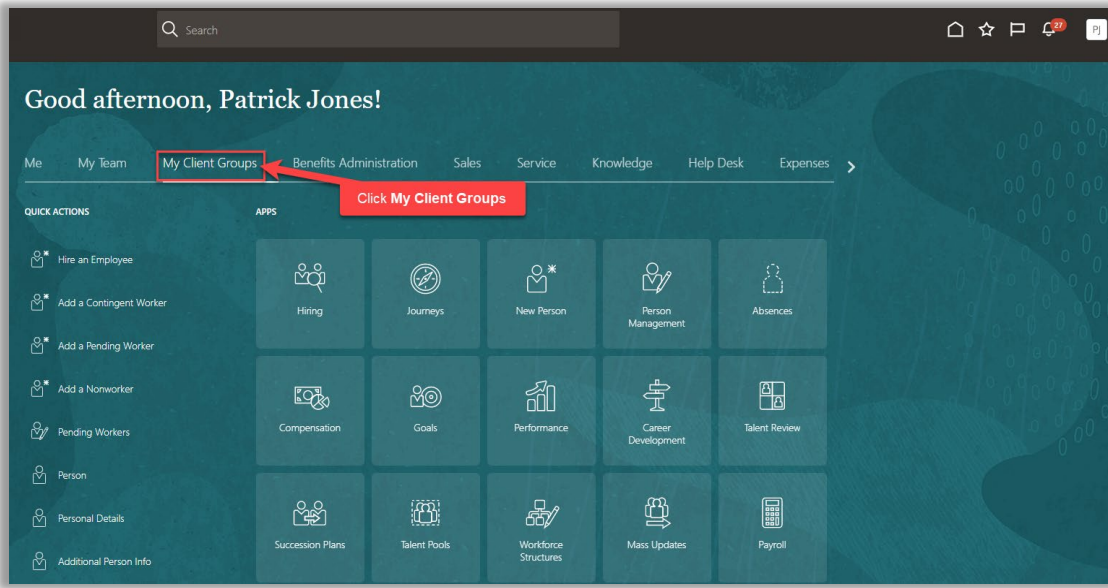
Save Save and Close

Click Save and Close

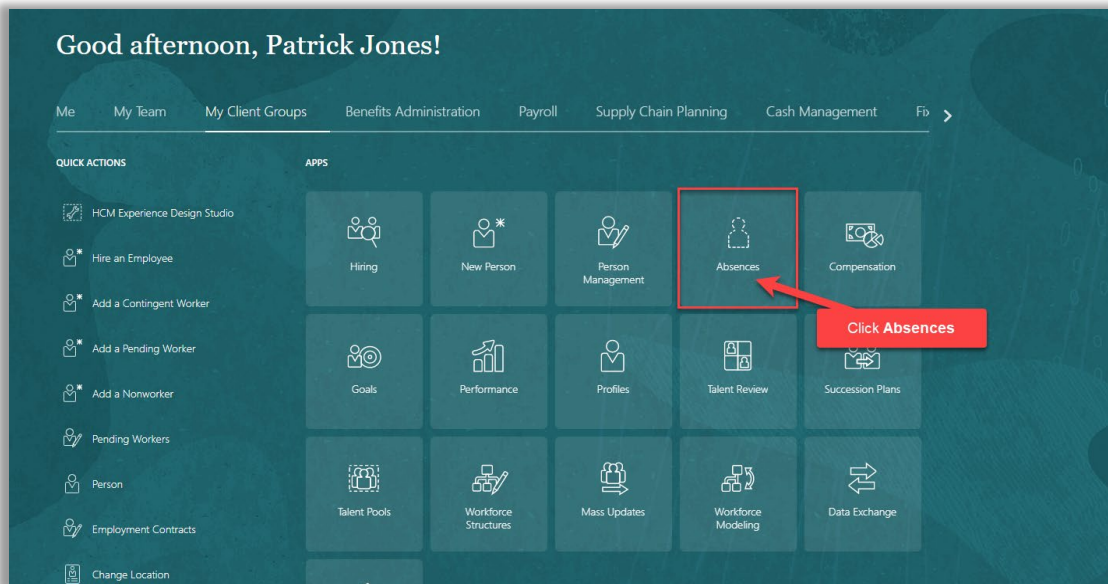
Settings To Allow HR To Enter Absence With A Negative Balance

Navigation: Home>My Client Groups>Absences>Absence Plans>Edit>Submit

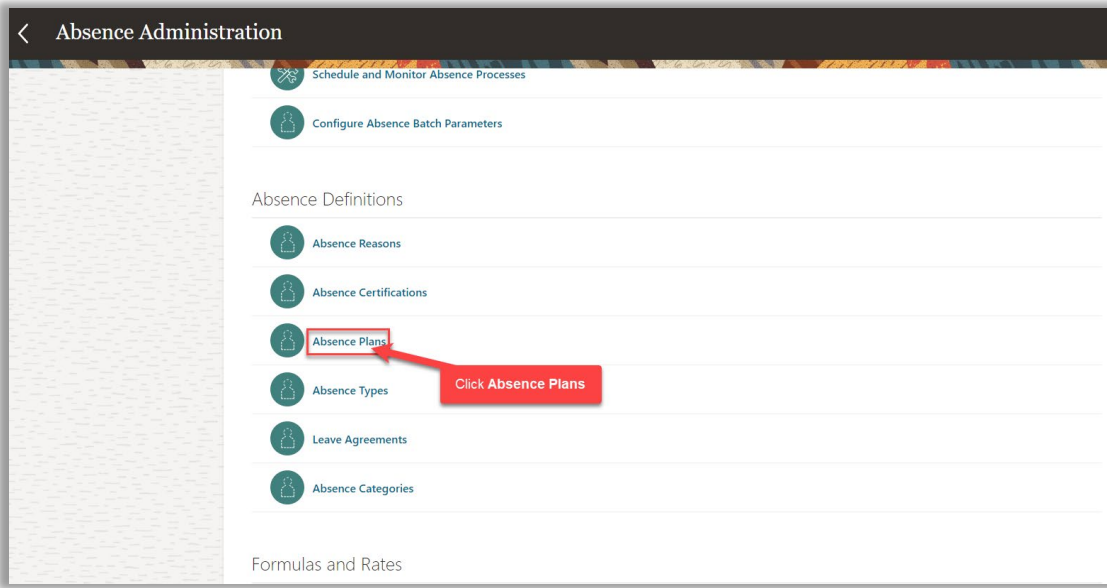
From the home screen, click **My Client Groups**



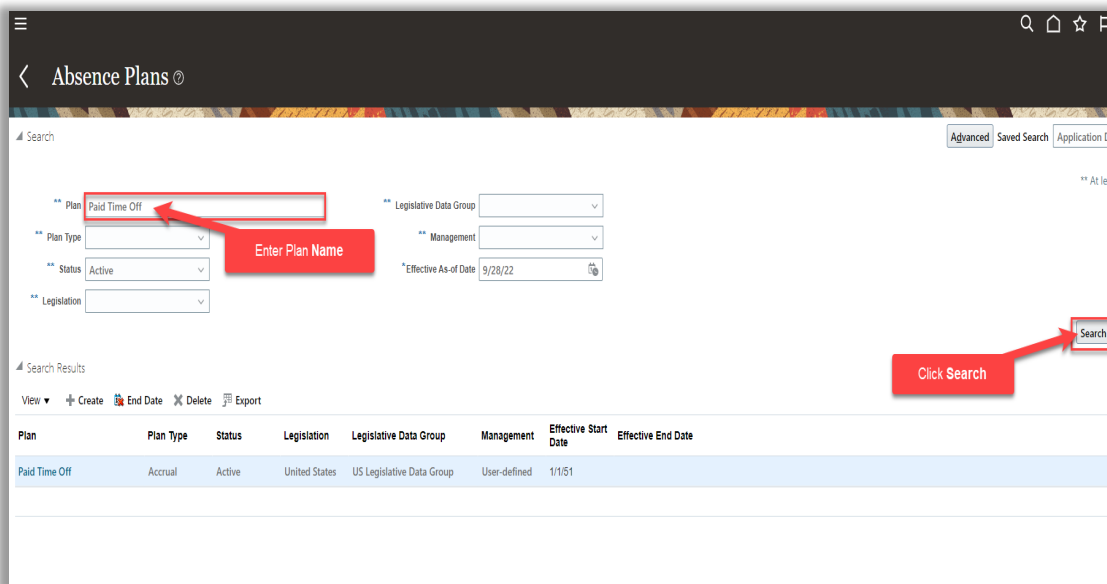
Next, click **Absences**



Scroll down and click **Absence Plans**. If preferred, we can also search the words **Absence Plans** in the Search box at the top



Enter the Absence Plans **Name** and click **Search**



Click **Absence Plan Name**

Absence Plans

Search

Plan: Paid Time Off
 Plan Type:
 Status: Active
 Legislation:
 Legislative Data Group:
 Management:
 Effective As-of Date: 9/28/22

Search Results

Plan	Plan Type	Status	Legislation	Legislative Data Group	Management	Effective Start Date	Effective End Date
Paid Time Off	Accrual	Active	United States	US Legislative Data Group	User-defined	1/1/51	

Click Name

Enter the **Session Effective Date** then, **Edit** and **Update**

View Plan Paid Time Off

Session Effective Date: 9/28/22

Basic Details

Effective Start Date: 1/1/51
 Plan Type: Accrual
 Management: User-defined
 Effective End Date:
 Legislation: United States

Plan Attributes

General Attributes

Plan: Paid Time Off
 Legislative Data Group: US Legislative Data Group
 Status: Active
 Description:
 Plan UOM: Hours
 Alternative Schedule Category:
 Legislative Grouping Code:
 Plan Term:
 Type: Anniversary year
 Anniversary Event Rule: Rehire date
 Balance Display:
 Worker Balance Display:
 Manager Balance Display:
 Processing Level: Assignment
 Conversion Formula:
 Plan Category:
 Enable concurrent entitlement:
 Update

Click Update

Click the **Accruals** Tab and under **Plan Limits**, check the box **Allow negative balance**. Additionally, we can enter a negative balance limit to ensure the negative leave doesn't exceed a specified amount

Edit Absence Plan Paid Time Off

*Session Effective Date: 9/28/22

Basic Details
 Effective Start Date: 1/1/51
 Plan Type: Accrual
 Management: User-defined
 Effective End Date:
 Legislation: United States

Plan Attributes: Participation | **Accruals** | Entries and Balances | Additional Details

Accrual Attributes
 Accrual Definition: ☒ Matrix ☐ Formula
 Partial Accrual Period:
 Formula:
 *Vesting Rule: None
 Payment Percentage: 100 %
 Accrual Method: Incremental
 Accrual Proration Rule: None
 Balance Frequency Source: Person primary frequency

Plan Limits
 Ceiling Rule: Include in matrix
 Ceiling Proration Rule: None
☒ Allow negative balance
 Negative Balance Limit:
 Limit Proration Rule:
 Annual Accrual Limit Rule:
 Limit Proration Rule:
 Year End Processing

Annotations:
 - Red box around 'Accruals' tab with arrow pointing to it: **Click Accruals**
 - Red box around 'Allow negative balance' checkbox with arrow pointing to it: **Check Checkbox**
 - Red box around 'Negative Balance Limit' field with arrow pointing to it: **Enter Limit**

Click **Save and Close**

Edit Absence Plan Paid Time Off

*Session Effective Date: 9/28/22

Basic Details
 Effective Start Date: 1/1/51
 Plan Type: Accrual
 Management: User-defined
 Effective End Date:
 Legislation: United States

Plan Attributes: Participation | **Accruals** | Entries and Balances | Additional Details

Accrual Attributes
 Accrual Definition: ☒ Matrix ☐ Formula
 Partial Accrual Period:
 Formula:
 *Vesting Rule: None
 Payment Percentage: 100 %
 Accrual Method: Incremental
 Accrual Proration Rule: None
 Balance Frequency Source: Person primary frequency

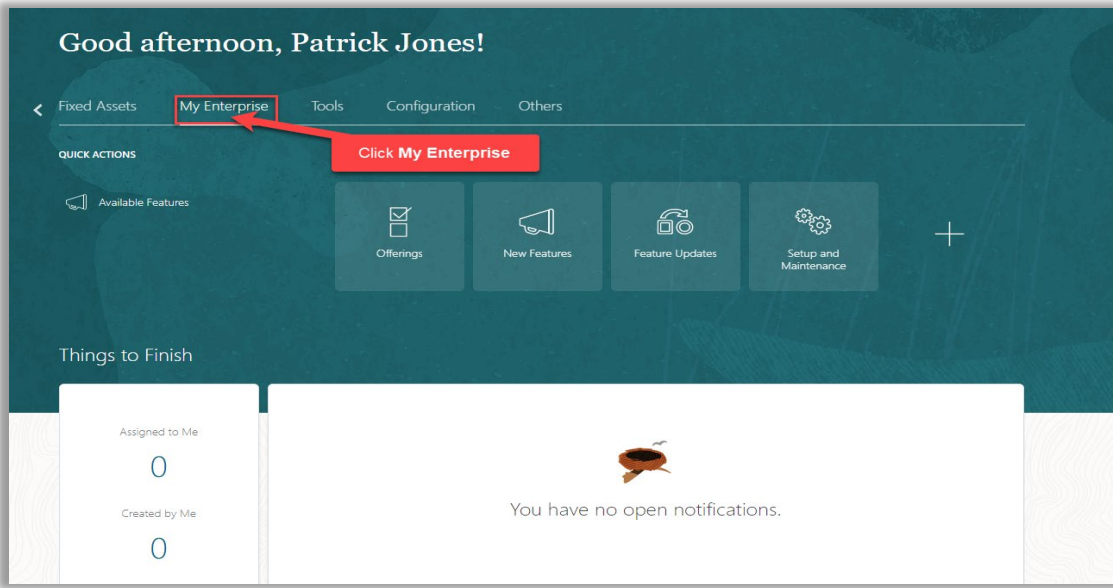
Plan Limits
 Ceiling Rule: Include in matrix
 Ceiling Proration Rule: None
☒ Allow negative balance
 Negative Balance Limit: 40 Hours
 Limit Proration Rule:
 Annual Accrual Limit Rule:
 Limit Proration Rule:
 Year End Processing

Annotations:
 - Red box around 'Save and Close' button with arrow pointing to it: **Click Save and Close**

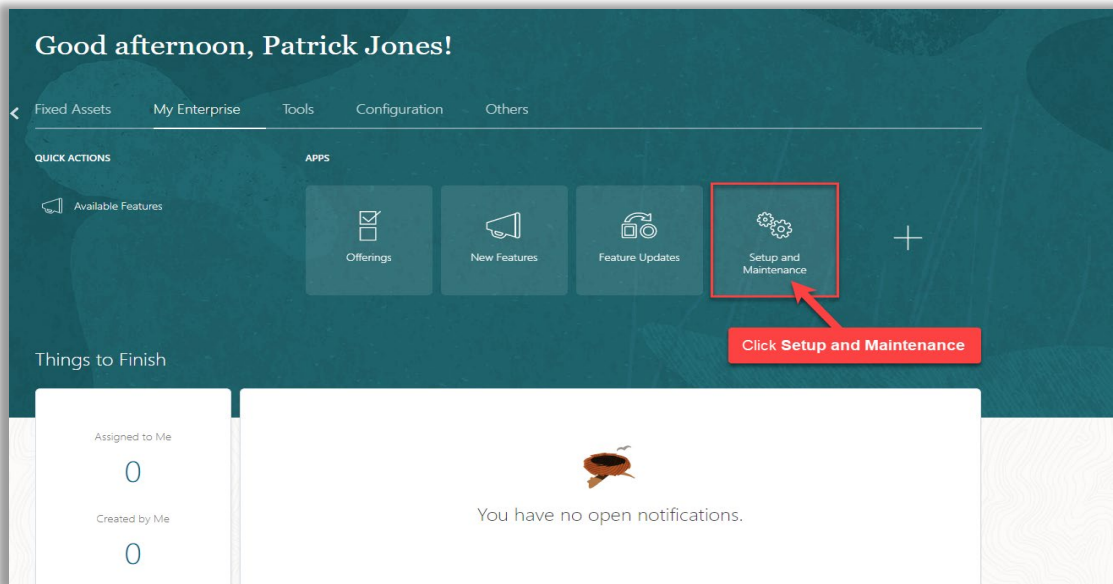
Create A Calendar Event

Navigation: Home>My Enterprise>Setup and Maintenance>Workforce Information>Create>Submit

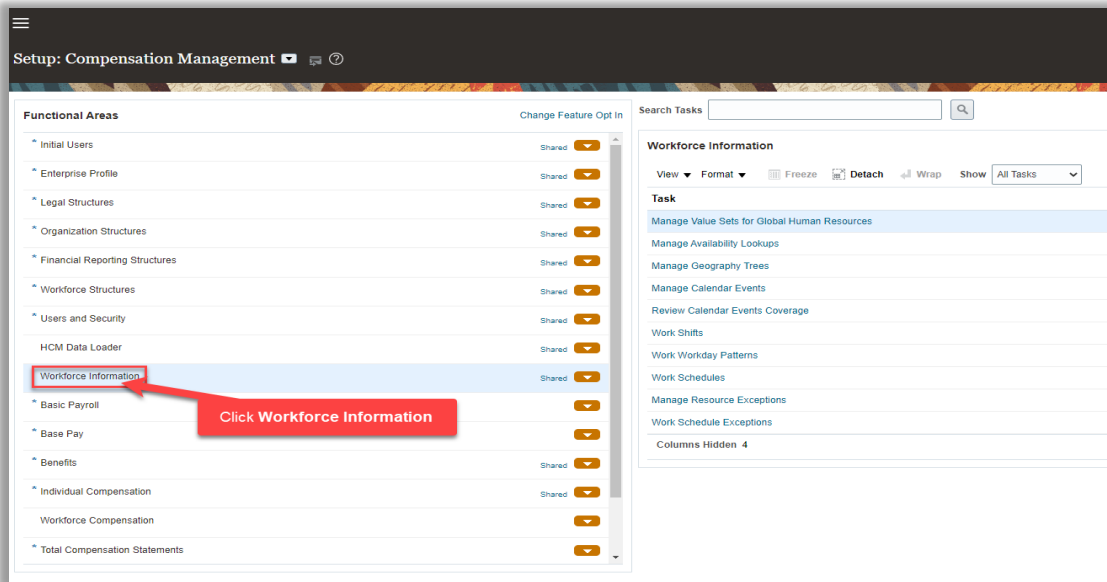
From the home screen, click **My Enterprise**



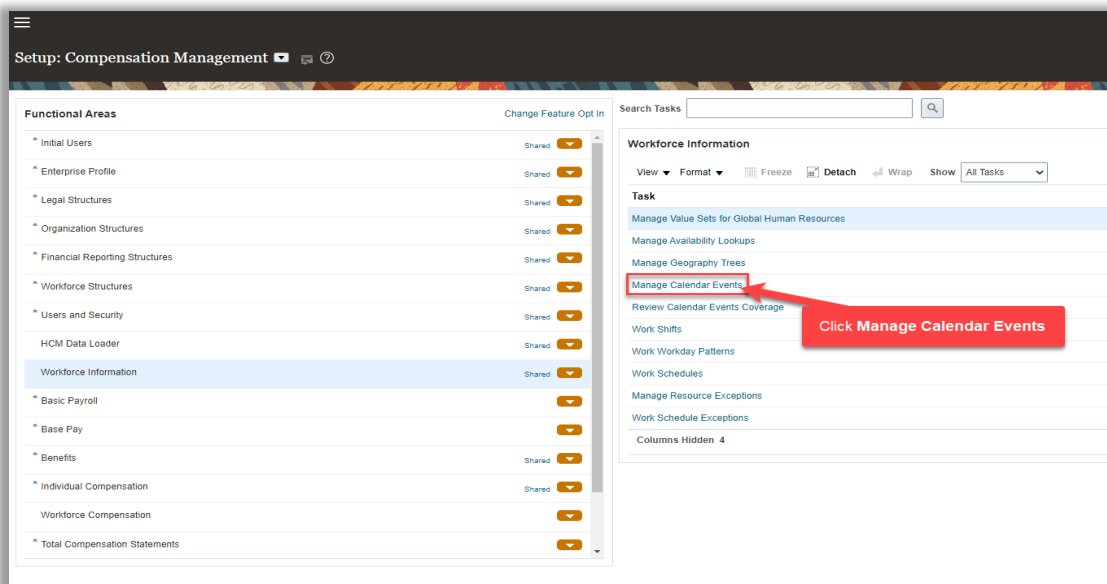
Click **Setup and Maintenance**



Click **Workforce Information** under **Functional Areas**



Click **Manage Calendar Events**



Click **Create**

Calendar Events

Search

Advanced Saved Search All Calendar Events

** At least one is

** Name ** Hierarchy Type

** Category

** Short Code

Search Reset

Search Results

Actions View Format **Create** Edit Delete Manage in Spreadsheet

Name	Category	Short Code	Hierarchy Type	Start Date	End Date	Description
No search conducted.						

Enter the Required Information such as **Name**, **Category**, **Start and End Date**, and **Short Code**. If we wish to restrict this holiday to US Only, we will need to attach this holiday to a **Hierarchy**

Create Calendar Event

Submit

Calendar Event

Enter the below information

*Name Juneteenth Observed

*Category Public holiday

☐ Half day for elapsed work schedules

*Start Date 6/20/22 12:00 AM

*End Date 9/29/22 12:00 AM

Coverage

Hierarchy Type Geographic

Hierarchy

Coverage Source

View Include Exclude Override Reset

Click **Submit**

Create Calendar Event

Calendar Event

*Name *Short Code

*Category Description

☐ Half day for elapsed work schedules

*Start Date *End Date

Coverage Hierarchy

Coverage Source

View

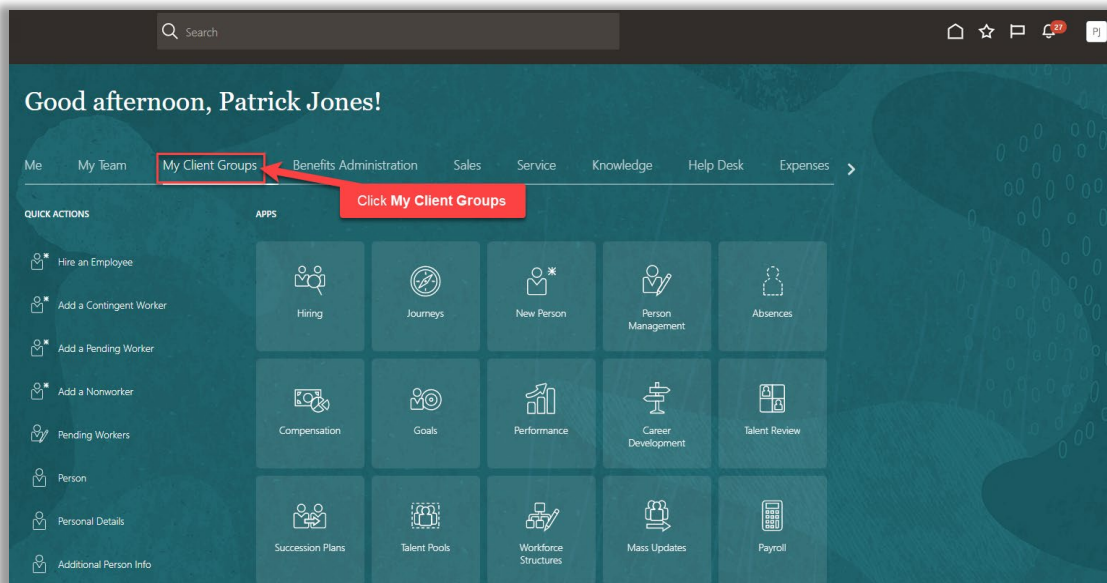
Click Submit

Daily Absence Management

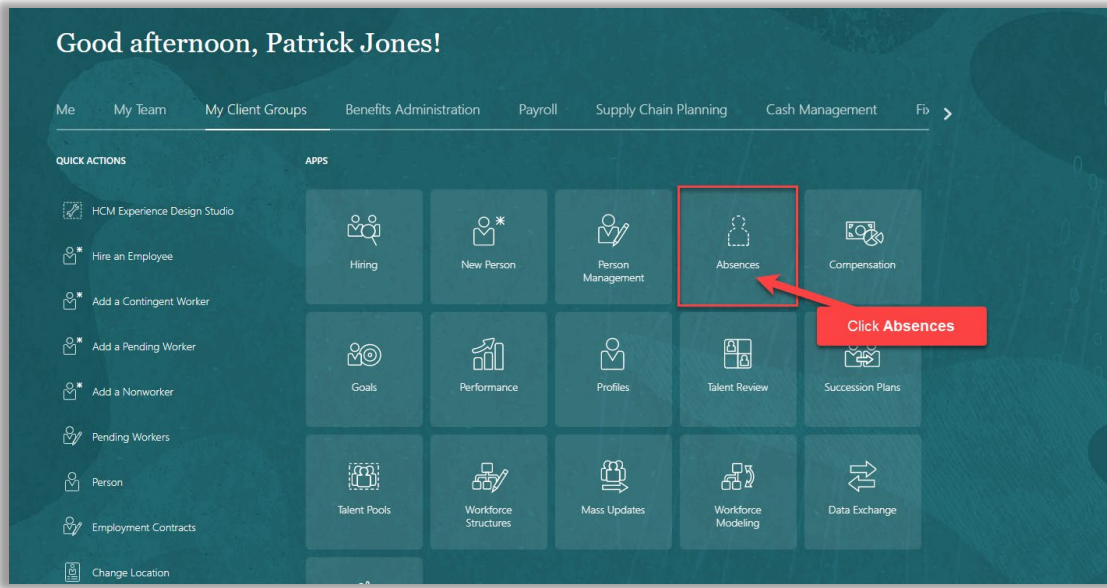
View Employee Absence Plans

Navigation: Home>My Client Groups>Absences>Absence Records

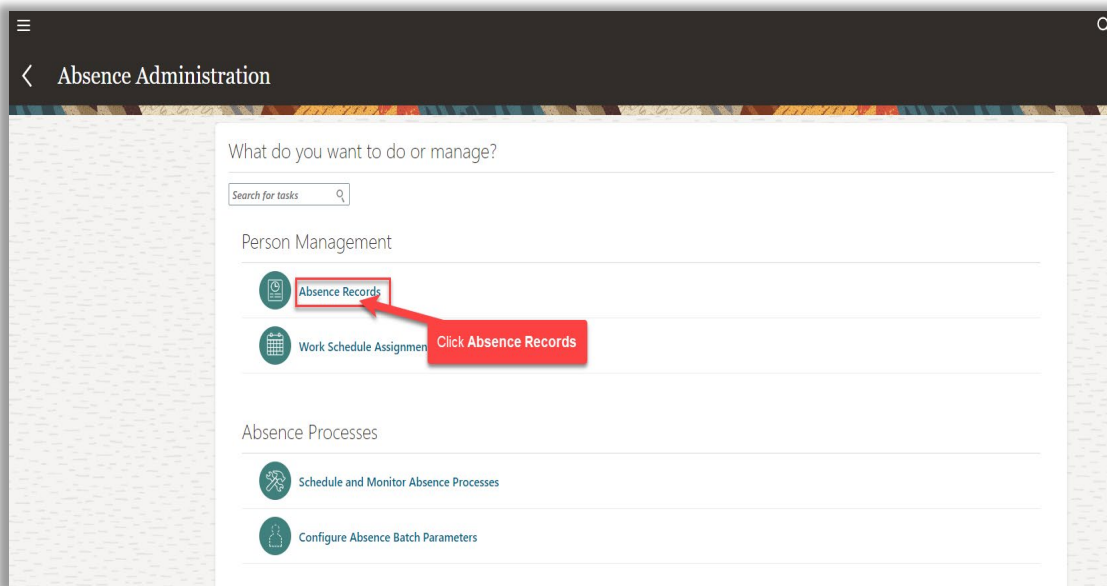
From the home screen, click **My Client Groups**



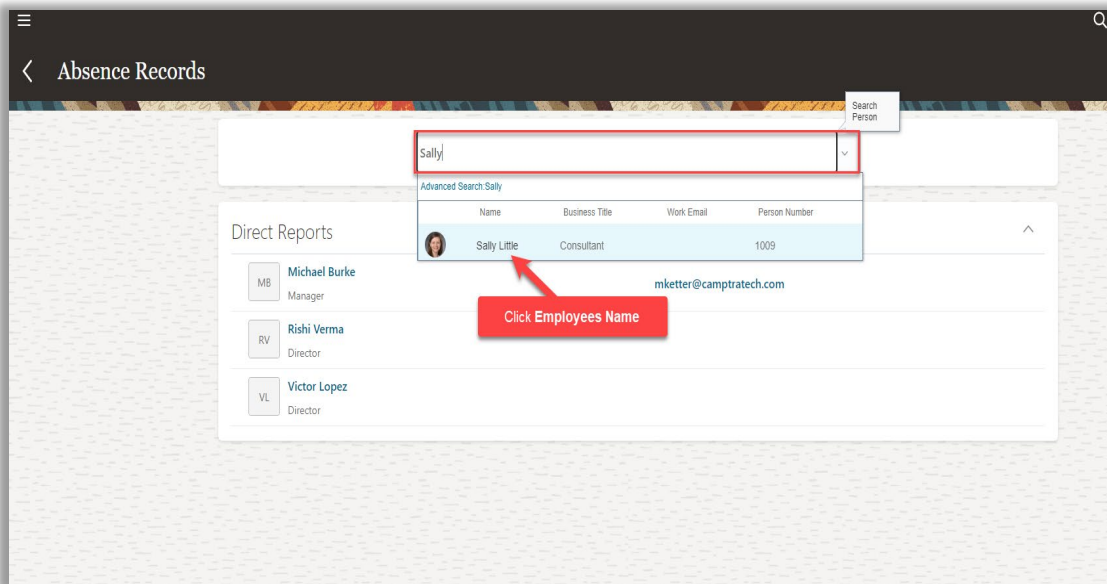
Next, click **Absences**



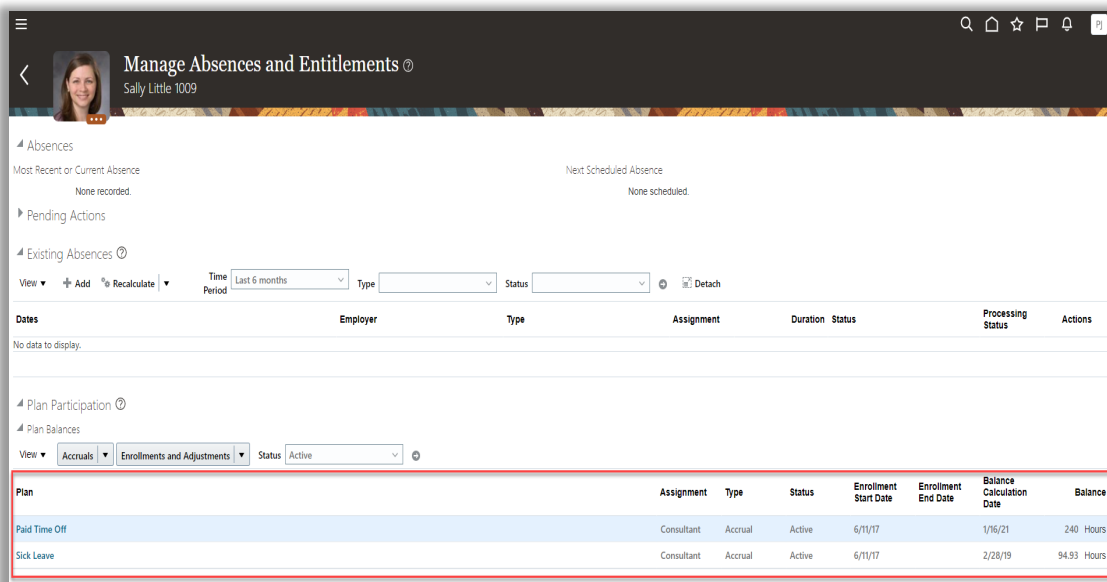
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



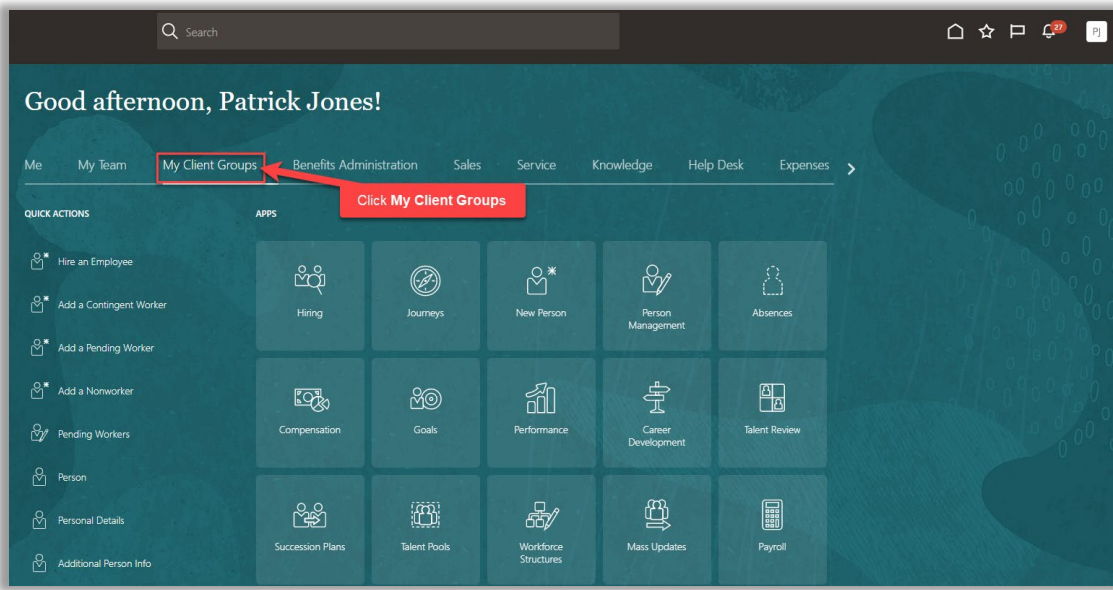
Under Plans, we can review the plans in which this employee is enrolled



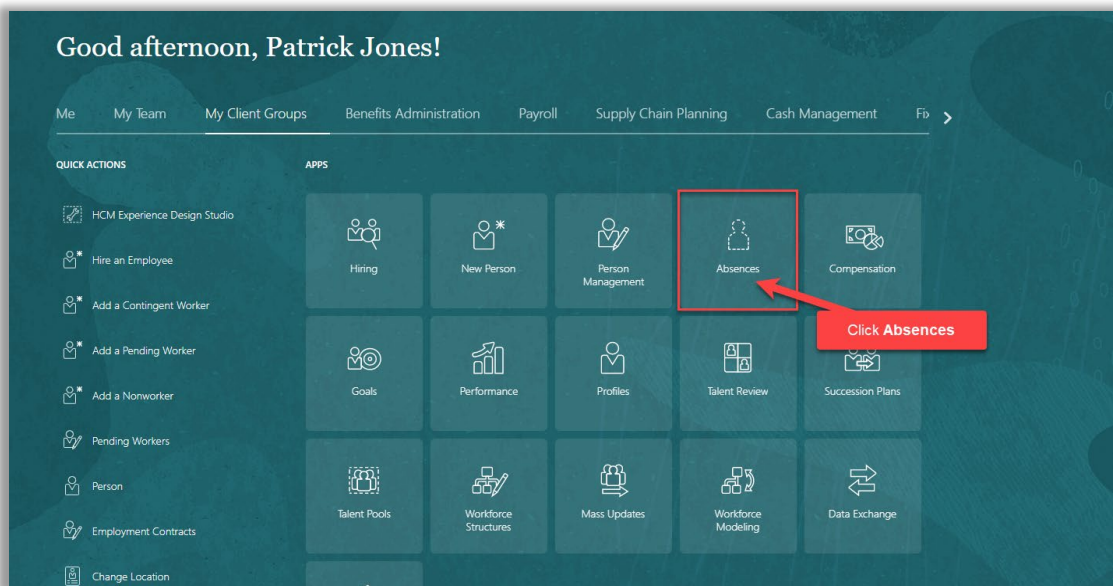
Manually Enroll An Employee Into A Plan

Navigation: Home>My Client Groups>Absences>Absence Records>Search Employee>Enrollment and Adjustments>Add Enrollment>Submit

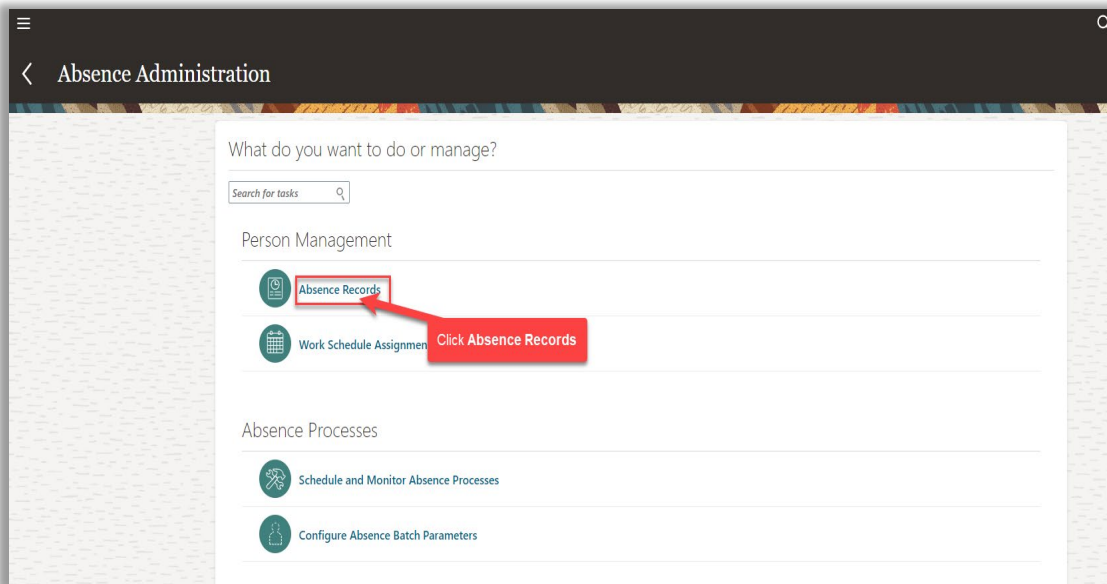
From the home screen, click **My Client Groups**



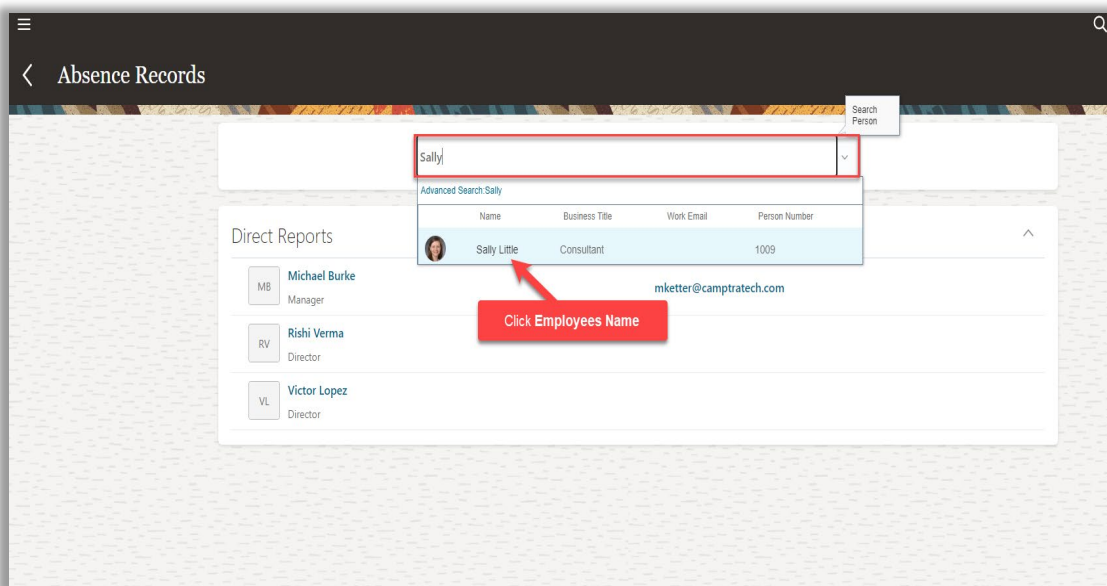
Next, click **Absences**



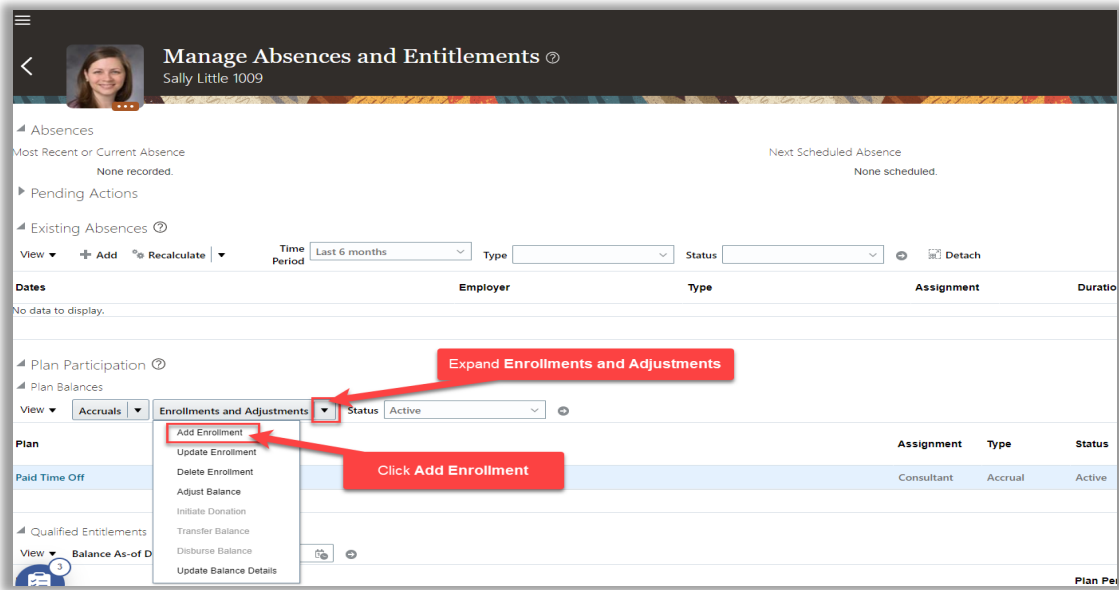
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



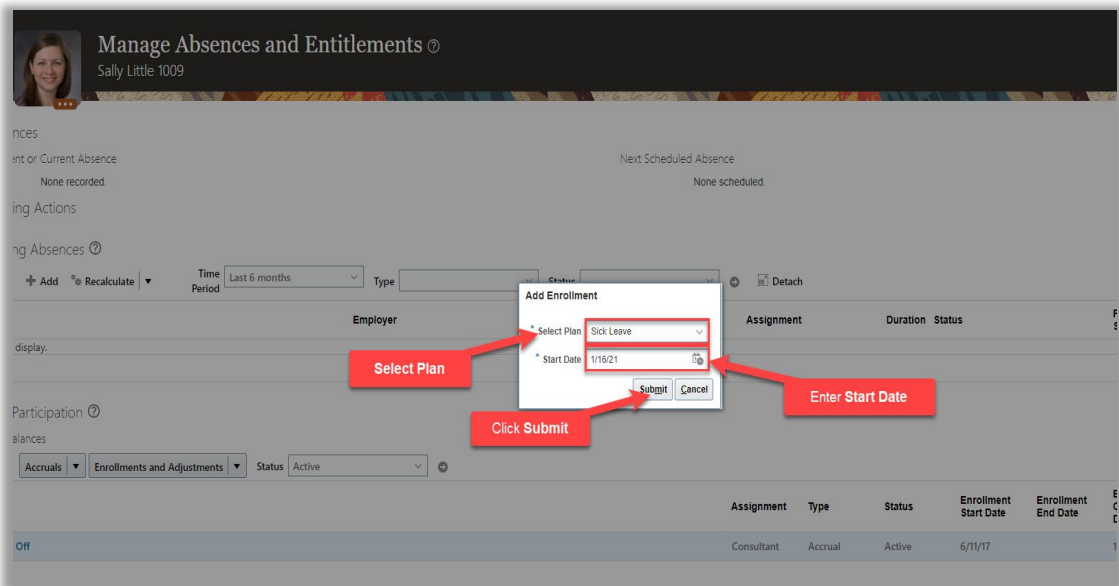
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



Under Plans, click **Enrollment and Adjustments** then **Add Enrollment**



Expand the drop down for **Select Plan** and select the plan and enter the **Start Date**. The **Start Date** can be the hire date or the date in which the employee became eligible for this plan. Click **Submit**



The Plan has been successfully added. To update the balance for an accrual, if needed, we would need to **Run Accruals For All Active Plans**

Manage Absences and Entitlements ②
Sally Little 1009

None recorded. None scheduled.

Pending Actions

Existing Absences ②

View ▾ + Add % Recalculate ▾ Time Period Last 6 months ▾ Type ▾ Status ▾ Detach

Dates	Employer	Type	Assignment	Duration	Status	Processing Status	Actions
No data to display.							

Plan Participation ②

Plan Balances

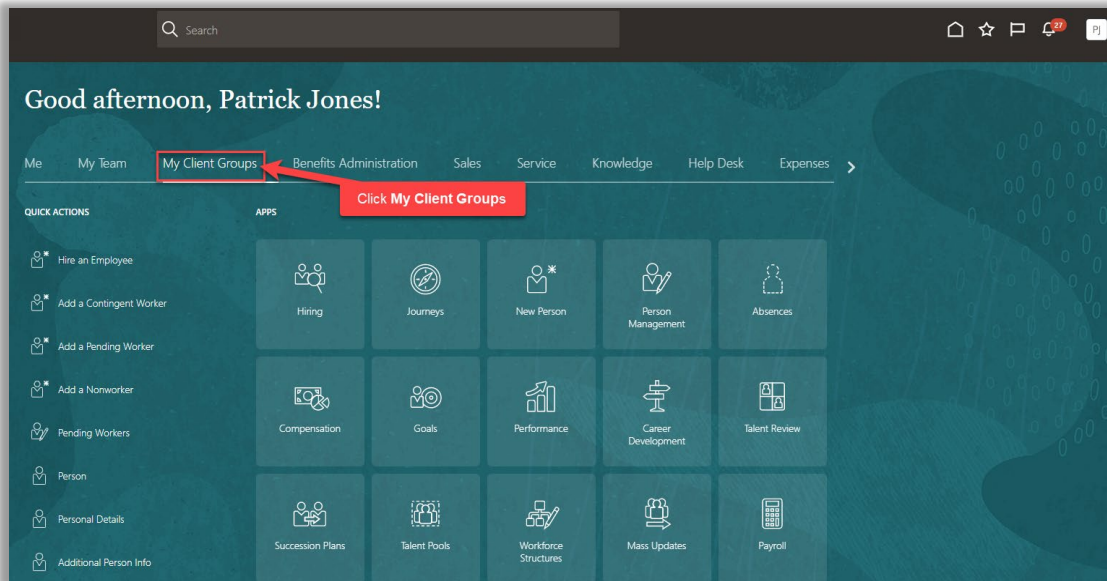
View ▾ Accruals ▾ Enrollments and Adjustments ▾ Status Active ▾

Plan	Assignment	Type	Status	Enrollment Start Date	Enrollment End Date	Balance Calculation Date	Balance
Paid Time Off	Consultant	Accrual	Active	6/11/17		1/16/21	240 Hours
Sick Leave	Consultant	Accrual	Active	1/16/21			0 Hours

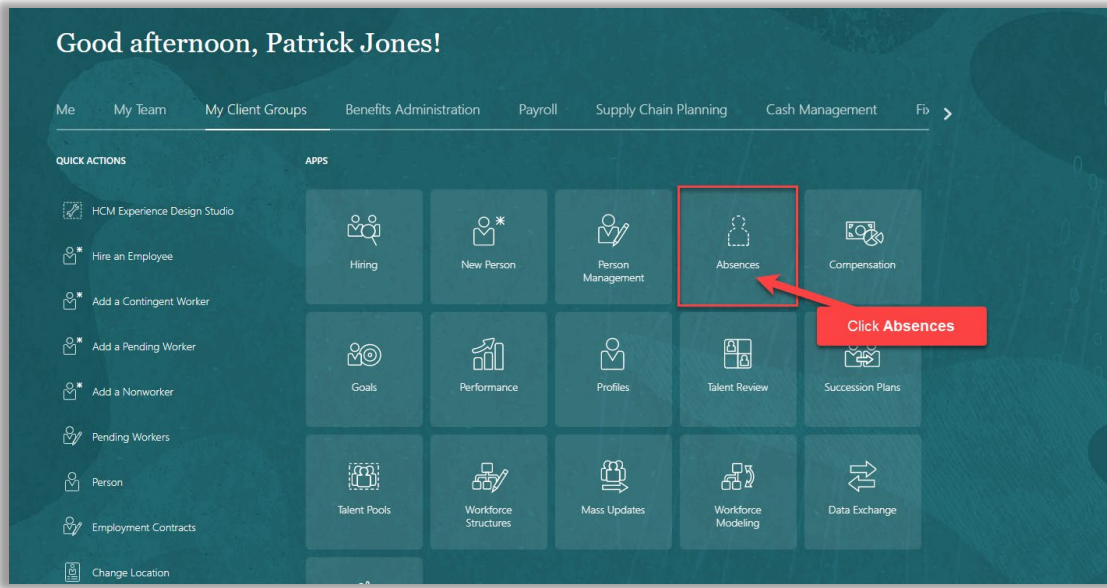
Manually Adjust Plan Balance

Navigation: Home>My Client Groups>Absences>Absence Records>Search Employee>Enrollment and Adjustments>Adjust Balance>Submit

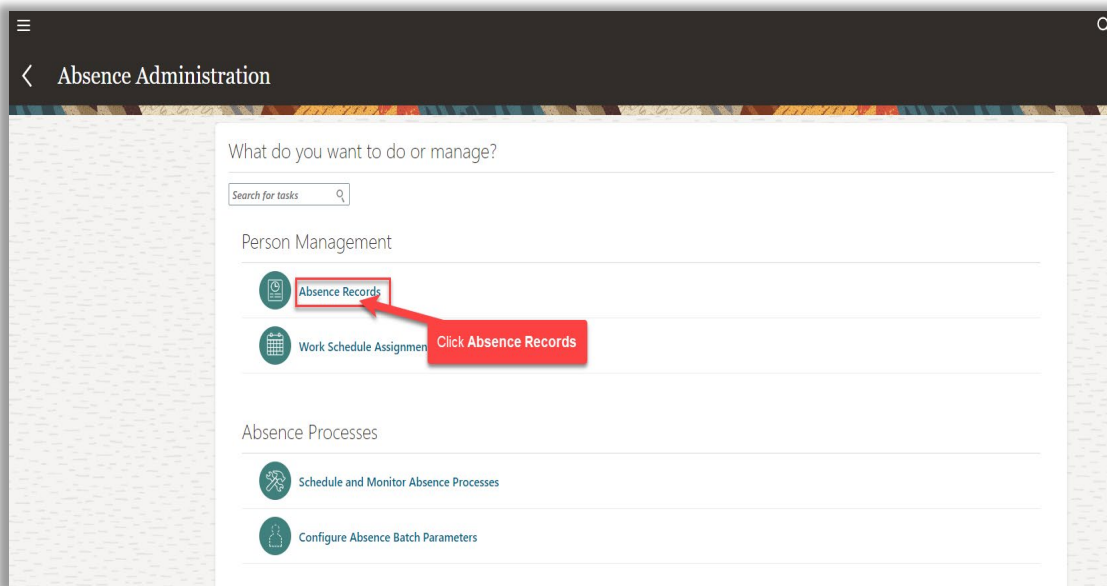
From the home screen, click **My Client Groups**



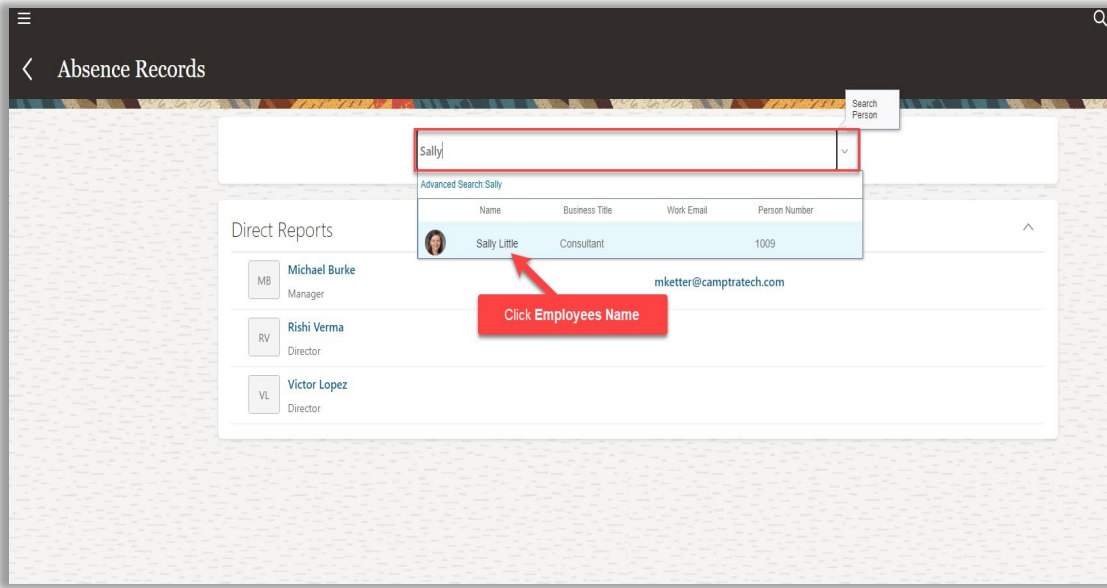
Next, click **Absences**



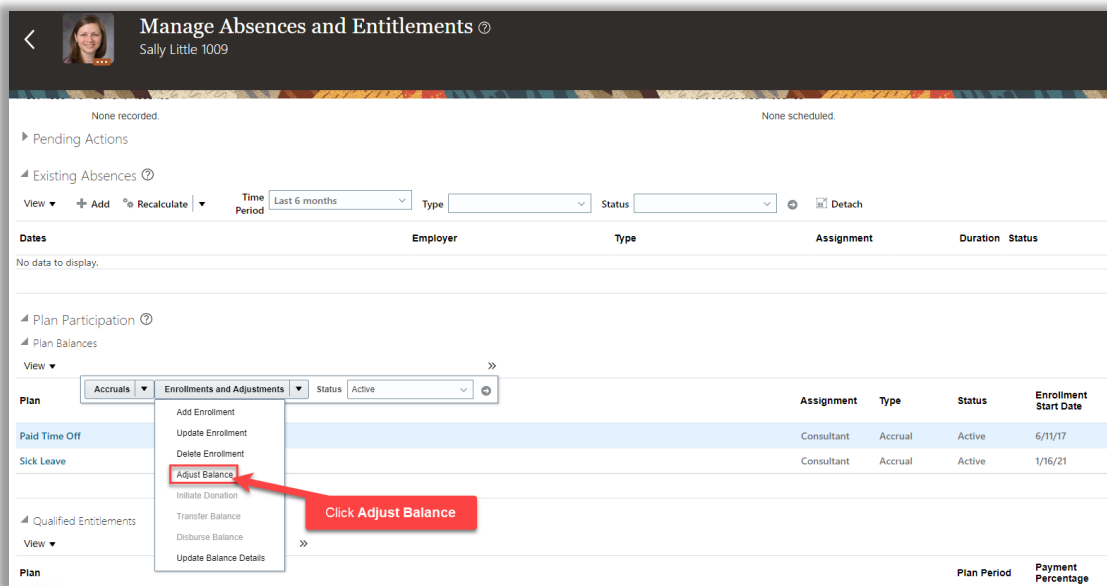
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



Under Plans, highlight the row of the plan and click **Enrollment and Adjustments** then, **Adjust Balance**



Select the **Reason**, enter the **Adjustment Amount**, and the **Date**. When entering the adjustment amount, to add to the balance, simply enter the amount. To remove from the balance, enter a negative entry. Click **Submit**

Balance

Plan: Sick Leave

* Reason: Clerical Error

* Adjustment Amount: 120

* Date: 1/16/21

Submit Cancel

Employer	Type	Assignment	Duration	Status
Consultant	Accrual	Active	6/11/17	
Consultant	Accrual	Active	1/16/21	

Plan Period	Payment Percentage	Q	Enti
9/30/21 - 9/2...	0.0		480

Next, to update the balance, we need to **Run Accruals for Selected Plan**. As a note, this process will only update the balance for one pay period; if you need to update the balance for multiple pay periods, follow the **Calculate Accruals & Balance Process**. Highlight the row of the plan and click **Accruals**, then **Run Accruals for Selected Plan**

Manage Absences and Entitlements

Sally Little 1009

Most Recent or Current Absence: None recorded.

Next Scheduled Absence: None scheduled.

Pending Actions

Existing Absences

View: Add % Recalculate Time Period: Last 6 months Type: Status: Detach

No data to display.

Plan Participation

Plan Balances

View: Accruals Enrollments and Adjustments Status: Active

Run Accruals for All Active Plans

Run Accruals for Selected Plan

Plan	Assignment	Type	Status	Enrollment Start Date	Enrollment End Date	Balance Calculation Date	Balance
Paid Time Off	Consultant	Accrual	Active	6/11/17	1/16/21	240	Hours
Sick Leave	Consultant	Accrual	Active	1/16/21		0	Hours

Qualified Entitlements

Enter the **Balance As-of Date** and click **Submit**

Next Scheduled Absence
None scheduled.

Time Period: Last 6 months | Type: | Status: | Detach

Employer | Type | Assignment | Duration | Status | Processing Status

Balance As-of Date: 9/29/22 | Calculate accruals and balances | Withdraw accruals and balances | Submit | Cancel

Click Submit

Enter Balance As-of Date

Assignment	Type	Status	Enrollment Start Date	Enrollment End Date	Balance Calculation Date
Consultant	Accrual	Active	6/11/17		1/16/21
Consultant	Accrual	Active	1/16/21		

Plan Period | Payment Percentage | Qualified Entitlement | Us

The **Plan Balance** has been updated

Manage Absences and Entitlements ②
Sally Little 1009

None recorded. | None scheduled.

Pending Actions

Existing Absences ②

View | Add | Recalculate | Time Period: Last 6 months | Type: | Status: | Detach

Dates | Employer | Type | Assignment | Duration | Status | Processing Status | Actions

No data to display.

Plan Participation ②

Plan Balances

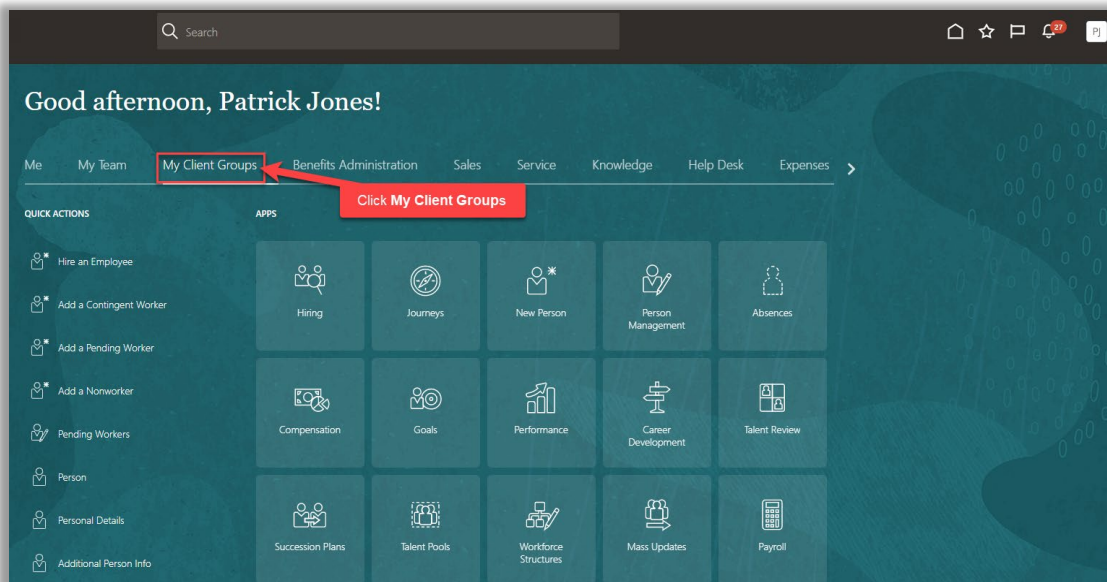
View | Accruals | Enrollments and Adjustments | Status: Active

Plan	Assignment	Type	Status	Enrollment Start Date	Enrollment End Date	Balance Calculation Date	Balance
Paid Time Off	Consultant	Accrual	Active	6/11/17	1/16/21		240 Hours
Sick Leave	Consultant	Accrual	Active	1/16/21	1/31/21		120 Hours

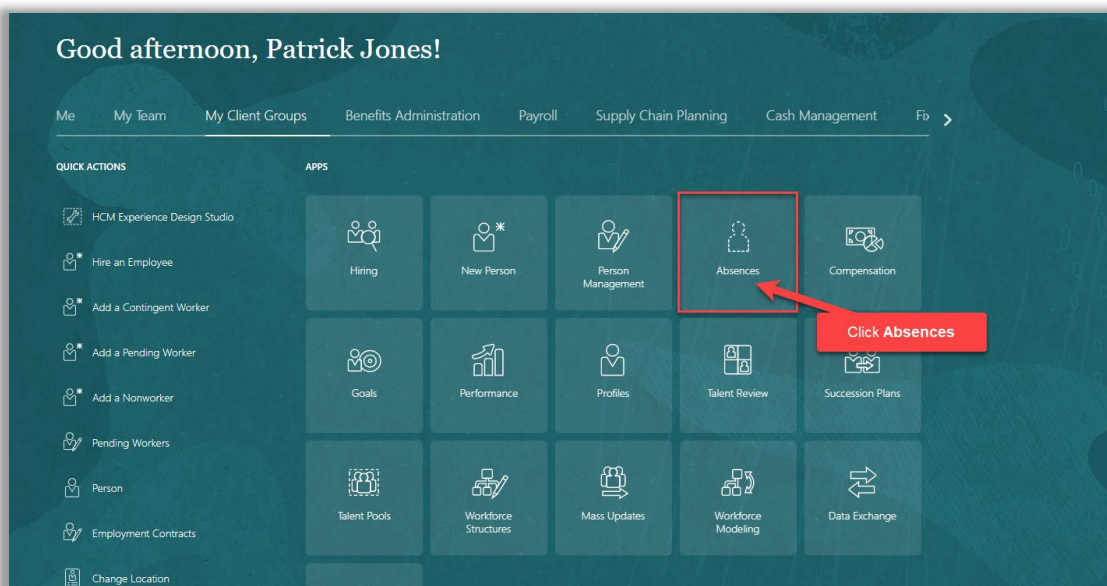
Update Balance Details

Navigation: Home>My Client Groups>Absences>Absence Records>Search Employee>Enrollment and Adjustments>Update Balance Details>Submit

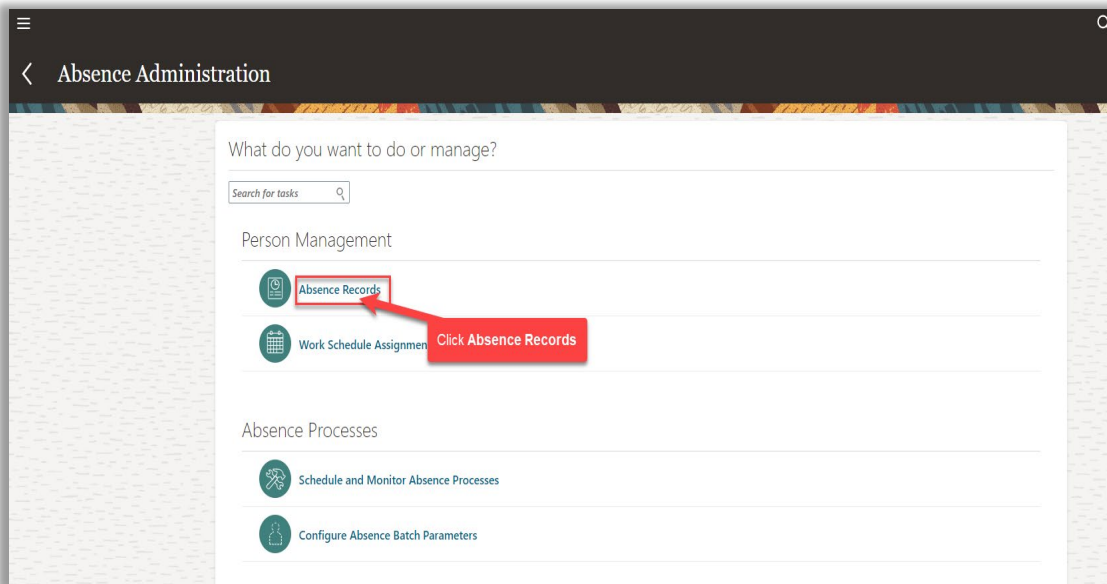
From the home screen, click **My Client Groups**



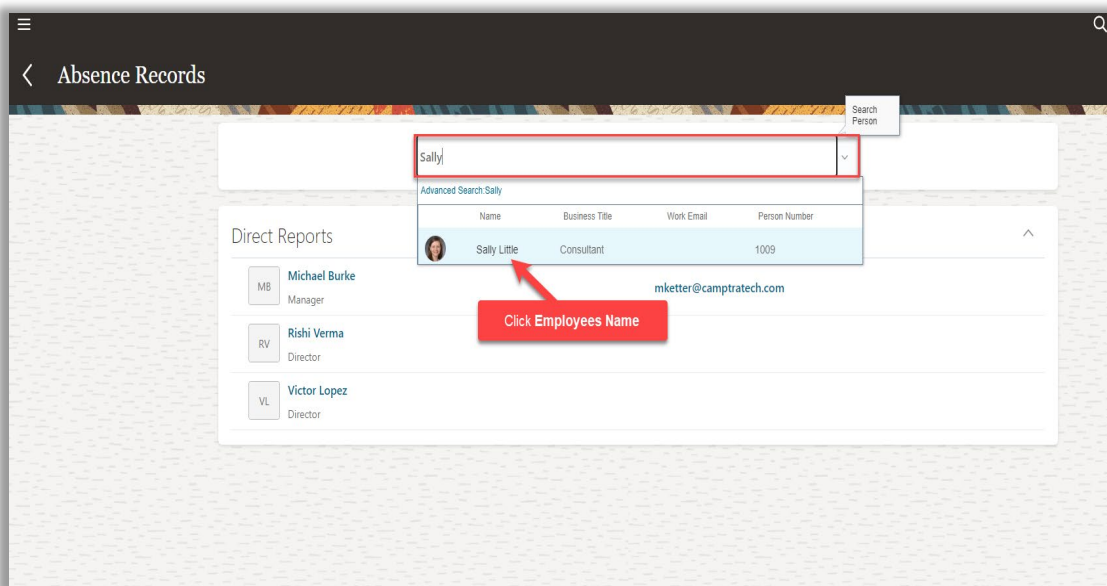
Next, click **Absences**



Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



Under Plans, highlight the row of the plan and click **Enrollment and Adjustments** then, **Update Balance Details**

Manage Absences and Entitlements

Existing Absences

View Add Recalculate Time Period: Last 6 months Type: Status: Detach

Dates	Employer	Type	Assignment	Duration	Status	Processing Status	Actions
No data to display.							

Plan Participation

Plan Balances

View Accruals Enrollments and Adjustments Status: Active

Plan

- Add Enrollment
- Update Enrollment
- Delete Enrollment
- Adjust Balance
- Initiate Duration
- Transfer Balance
- Disburse Balance
- Update Balance Details

Plan	Assignment	Type	Status	Enrollment Start Date	Enrollment End Date	Balance Calculation Date	Balance
Paid Time Off	Consultant	Accrual	Active	6/11/17	1/16/21	240	Hours
Sick Leave	Consultant	Accrual	Active	1/16/21	1/31/21	120	Hours

Qualified Entitlements

View Balance As-of Date

Plan

- Update Balance Details

Plan	Plan Period	Payment Percentage	Qualified Entitlement	Used	Remaining
FMLA	9/30/21 - 9/2...	0.0	480 Hours	0 Hours	480 Hours

Click Update Balance Details

Enter the **Balance As-of Date** and click the **Arrow** to populate the **Balance Details**

Last 6 months Type: Status: Detach

Employer	Type	Assignment	Duration	Status	Proces Status
[Empty rows]					

Update Balance Details : Paid Time Off

Balance As-of Date: 9/29/22

Balance: 340 Hours

View

Date	Type	Value	Reason	Voided
9/29/22	Adjustment	20	Clerical Error	<input type="checkbox"/>

Enter Balance As-of Date

Click Arrow

Submit Cancel

Status	Enrollment Start Date	Enrollment End Date	Balance Calculation Date
Active	6/11/17	1/16/21	1/16/21
Active	1/16/21	1/31/21	1/31/21

Plan Period	Payment Percentage	Qualified Entitlement
9/30/21 - 9/2...	0.0	480 Hours

We can update the **Value**, **Reason**, or **Void** the entry. Click **Submit**

Update Balance Details : Paid Time Off

Balance As-of Date: 9/29/22

Balance: 340 Hours

View ▾ [icon] Detach

Date	Type	Value	Reason	Voided
9/29/22	Adjustment	10	Clerical Error ▾	<input checked="" type="checkbox"/>

Submit Cancel

Click Submit

Next, to update the balance, we need to **Run Accruals for Selected Plan**. As a note, this process will only update the balance for one pay period; if you need to update the balance for multiple pay periods, follow the **Calculate Accruals & Balance Process**. Highlight the row of the plan and click **Accruals**, then **Run Accruals for Selected Plan**

Manage Absences and Entitlements
Sally Little 1009

Most Recent or Current Absence: None recorded. Next Scheduled Absence: None scheduled.

Pending Actions

Existing Absences

View ▾ + Add % Recalculate ▾ Time Period: Last 6 months Type: Status: [icon] Detach

Dates: Employer: Type: Assignment: Duration: Status: Processing Status: Actions

No data to display.

Plan Participation

Plan Balances

View ▾ **Accruals** ▾ Enrollments and Adjustments ▾ Status: Active

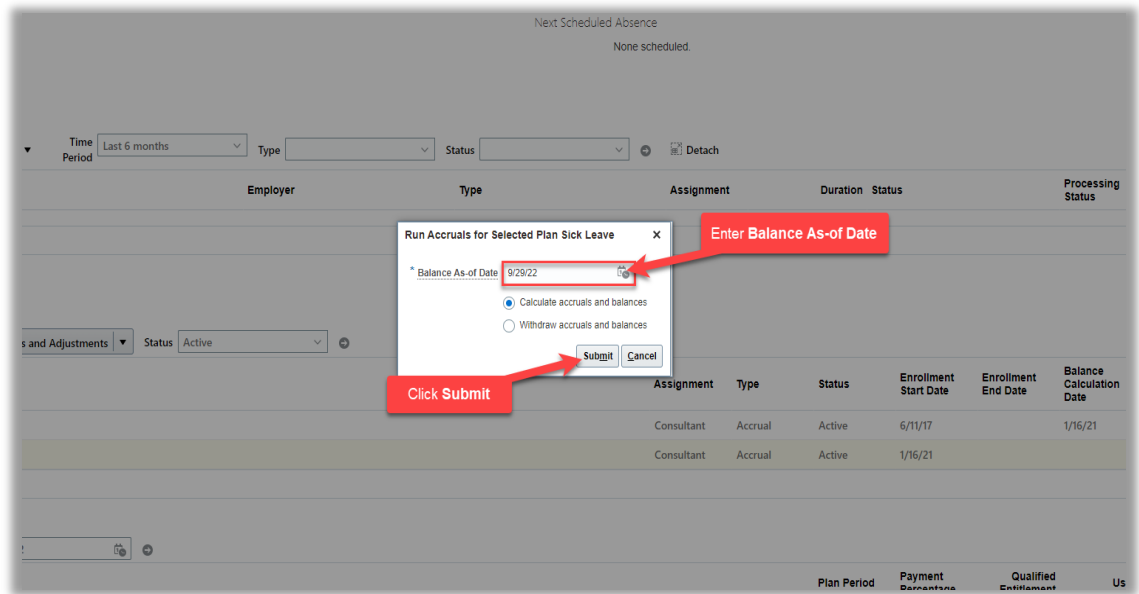
Plan	Assignment	Type	Status	Enrollment Start Date	Enrollment End Date	Balance Calculation Date	Balance
Paid Time Off	Consultant	Accrual	Active	6/11/17	1/16/21	240 Hours	
Sick Leave	Consultant	Accrual	Active	1/16/21		0 Hours	

Qualified Entitlements

Expand Drop down

Click Run Accruals for Selected Plan

Enter the **Balance As-of Date** and click **Submit**

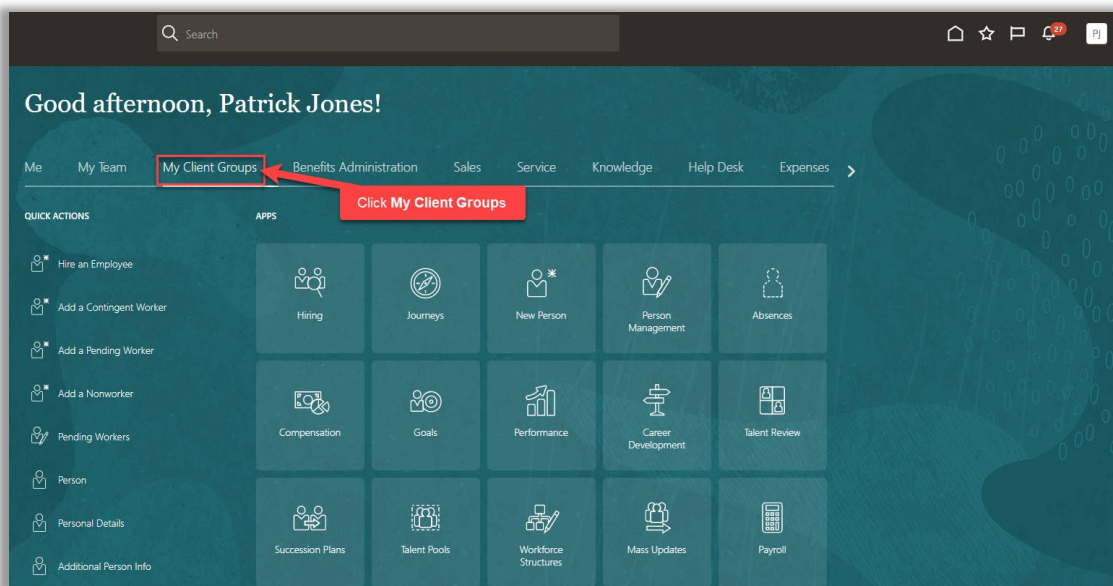


The **Plan Balance** has been updated.

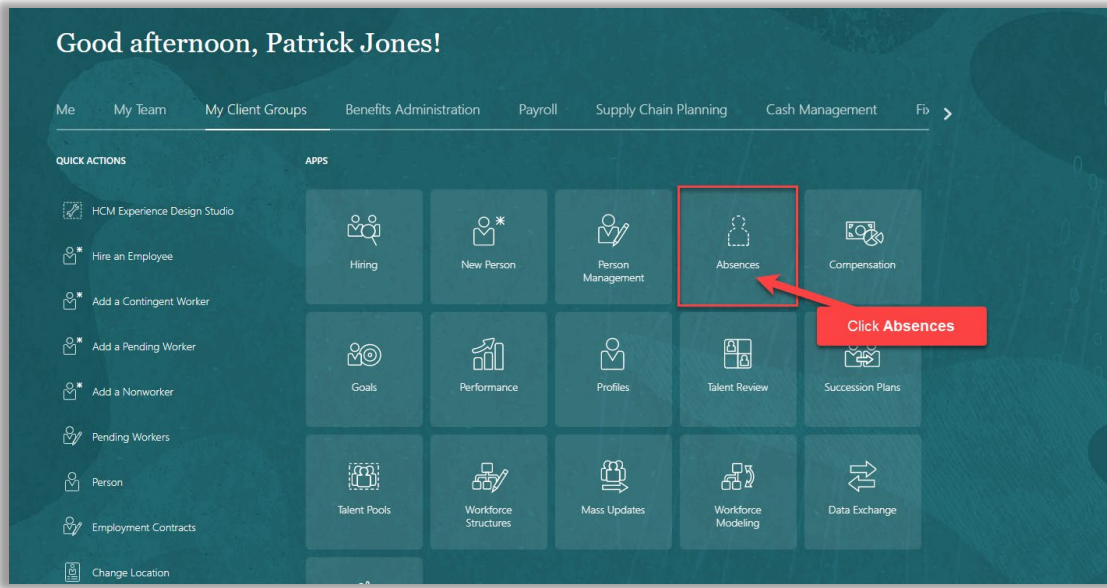
View Current & Projected Leave Balance

Navigation: Home>My Client Groups>Absences>Absence Records>Search Employee>Select Plan>Enter Projected Date>Arrow

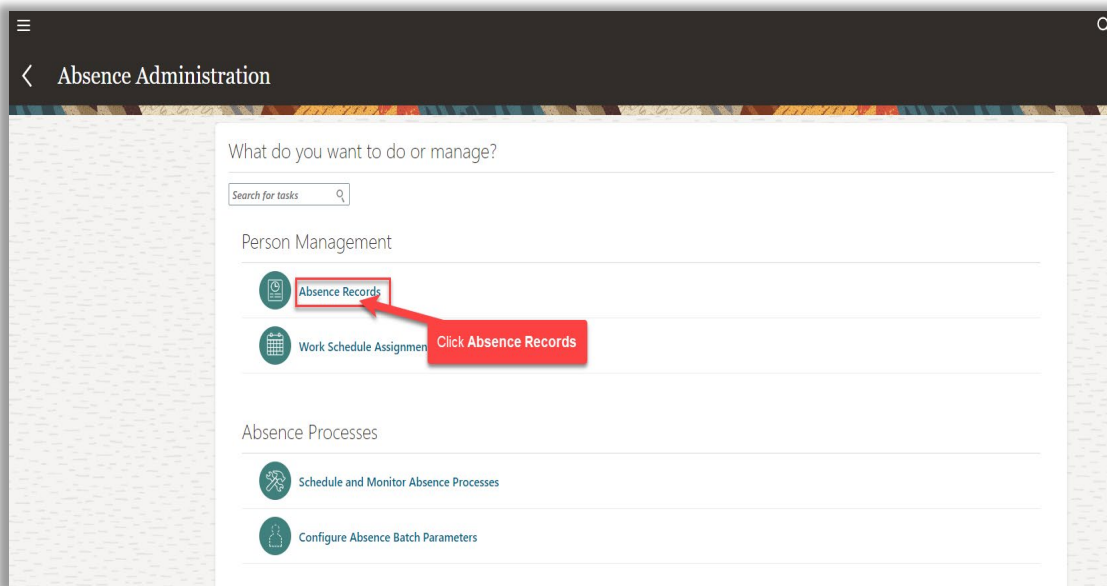
From the home screen, click **My Client Groups**



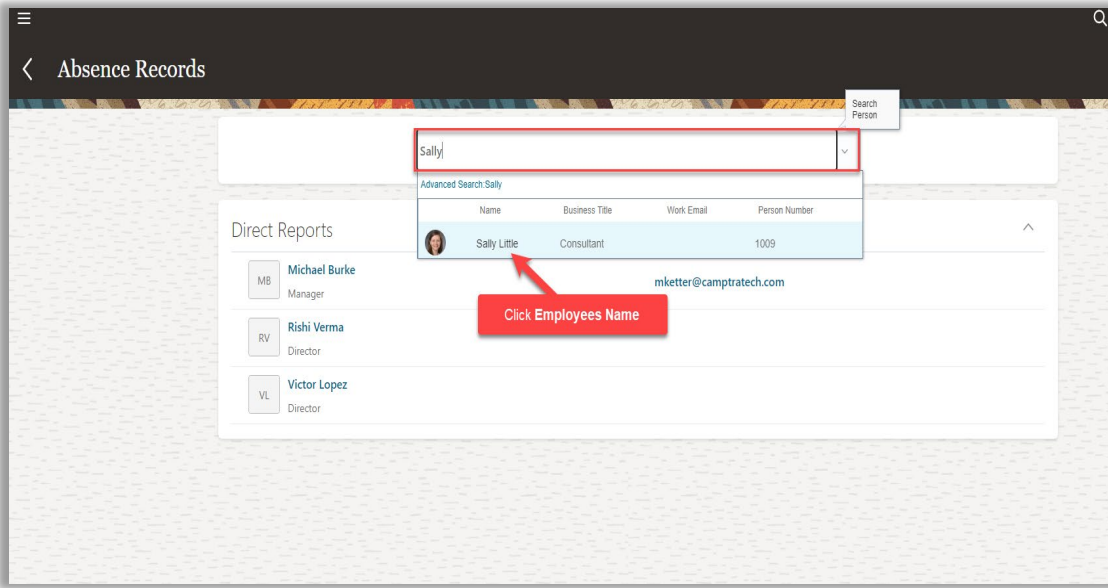
Next, click **Absences**



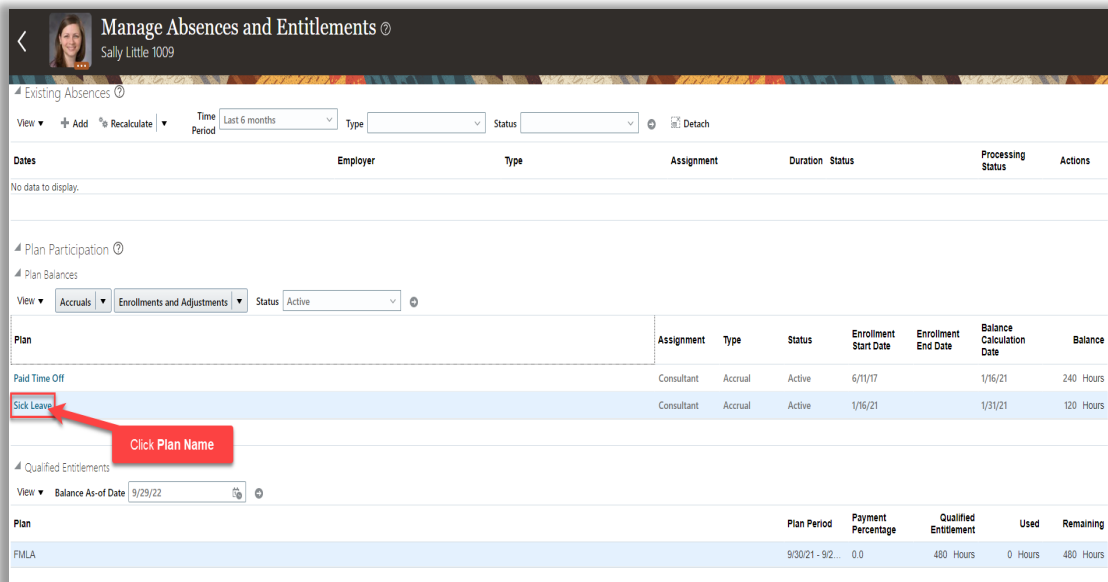
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



Under Plans, click the **Plan Name**



Enter the **Balance Calculation Date** and then, click the **Arrow**

Accrual Plan Balance : Sick Leave

Balance Calculation Date: 9/22/22

Plan Period Start Date: 1/1/22

Balance: 183.27 Hours

Date	Type	Additional Information	Hours	Status
8/31/22	Periodic accrual		3.33	Projected
7/31/22	Periodic accrual		3.33	Projected
6/30/22	Periodic accrual		3.33	Projected
5/31/22	Periodic accrual		3.33	Projected

Scroll down to view the **Plan Details**. We can review the **Balance** as of the **Balance Calculation Date**. Projected, under the Status column, represents a projected accrual. We can also view the accrual rates under the **Hours** column as well as the **Date** in which the accrual is applied

Accrual Plan Balance : Sick Leave

Balance Calculation Date: 9/22/22

Plan Period Start Date: 1/1/22

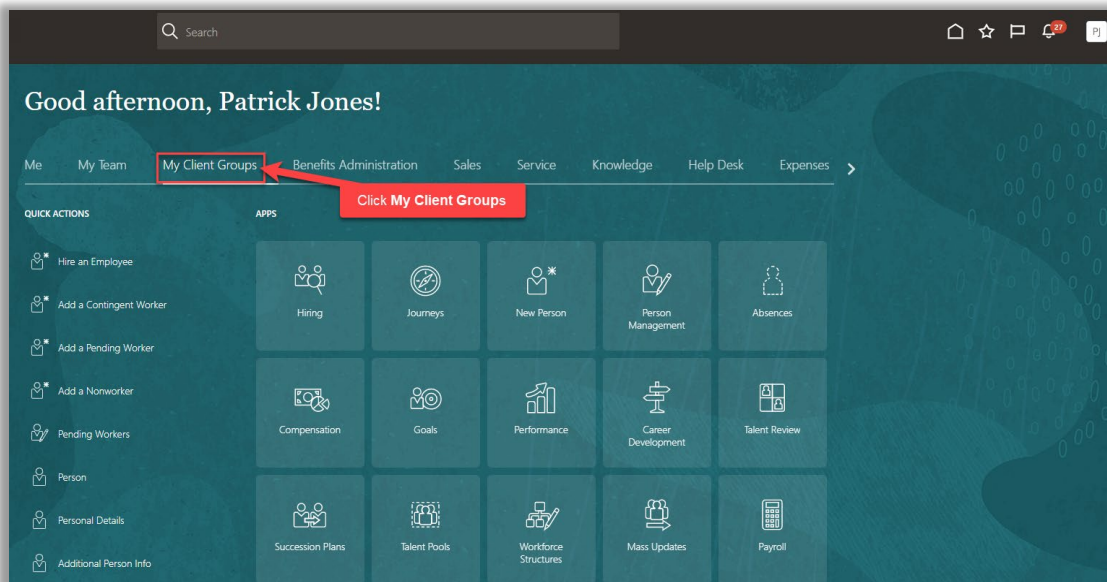
Balance: 183.27 Hours

Date	Type	Additional Information	Hours	Status
8/31/22	Periodic accrual		3.33	Projected
7/31/22	Periodic accrual		3.33	Projected
6/30/22	Periodic accrual		3.33	Projected
5/31/22	Periodic accrual		3.33	Projected

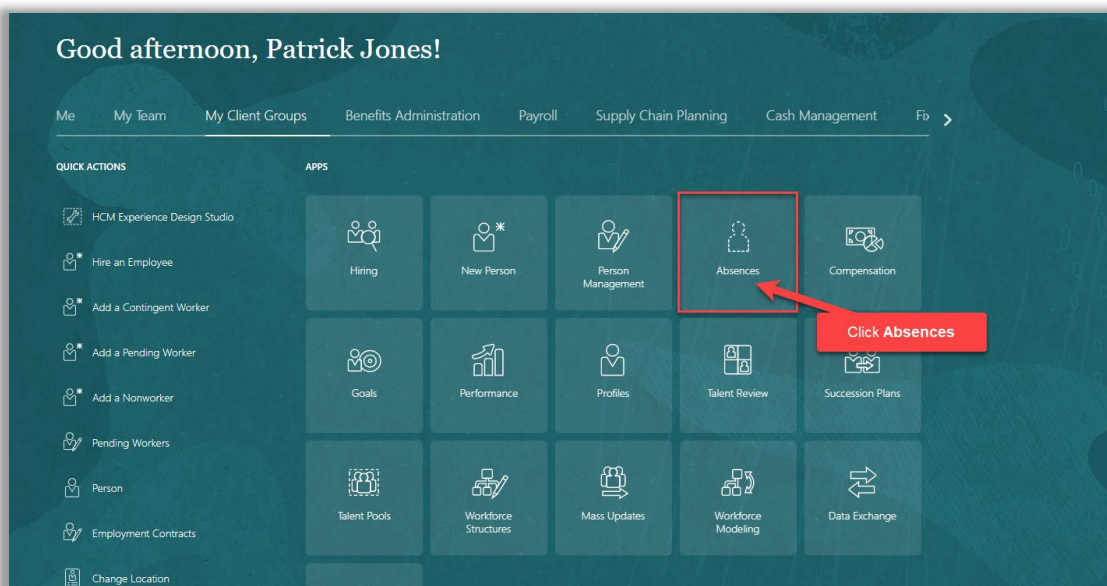
Update Absence Plan Enrollment Date

Navigation: Home>My Client Groups>Absences>Absence Records>Search Employee>Enrollment and Adjustments>Update Enrollment>Submit

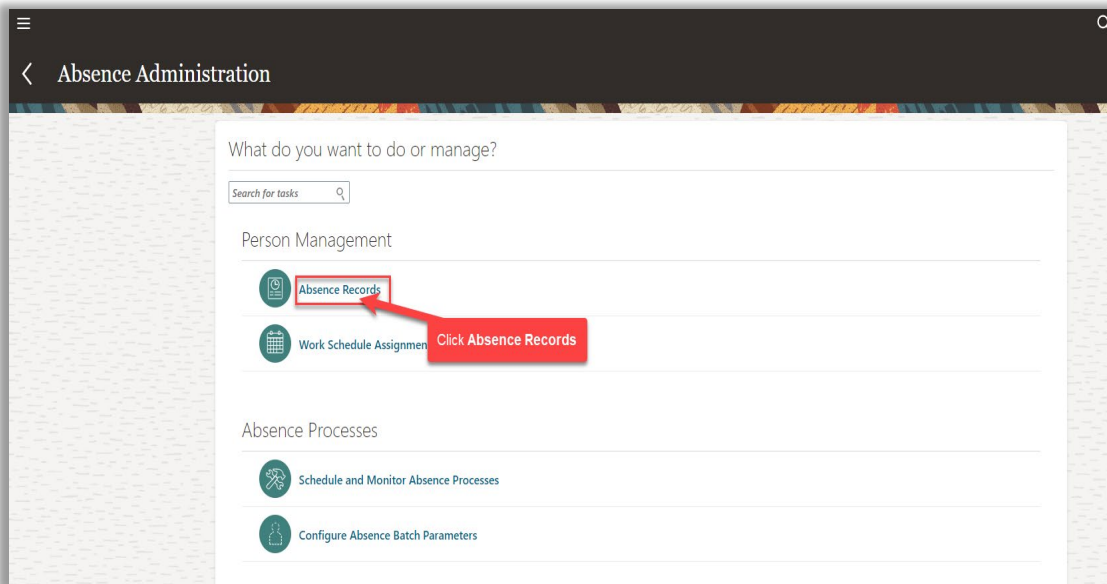
From the home screen, click **My Client Groups**



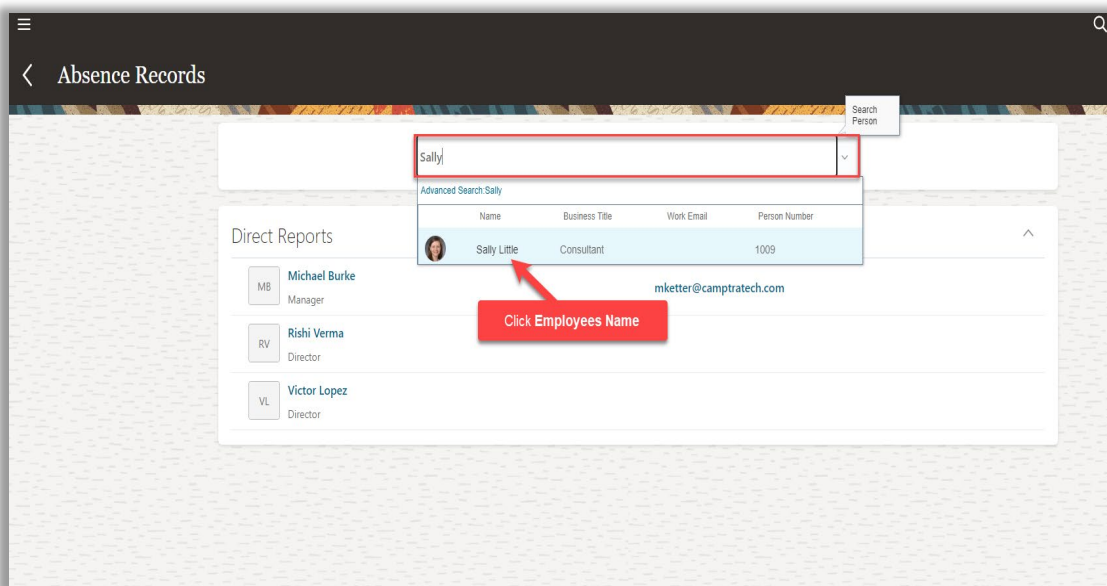
Next, click **Absences**



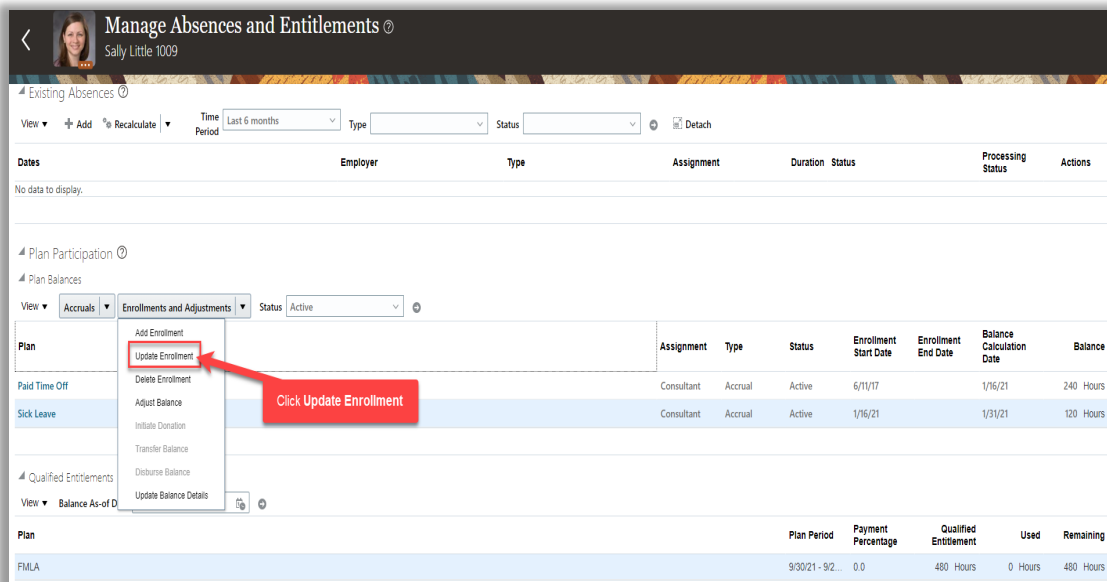
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



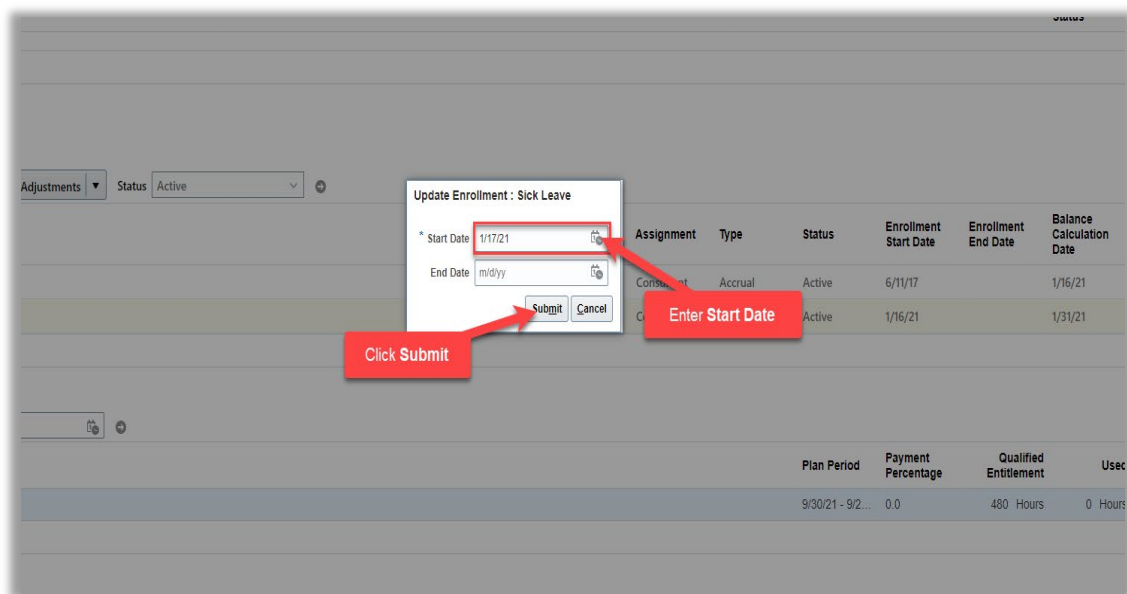
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



Under Plans, highlight the row of the plan and click **Enrollment and Adjustments** then, **Update Enrollment**



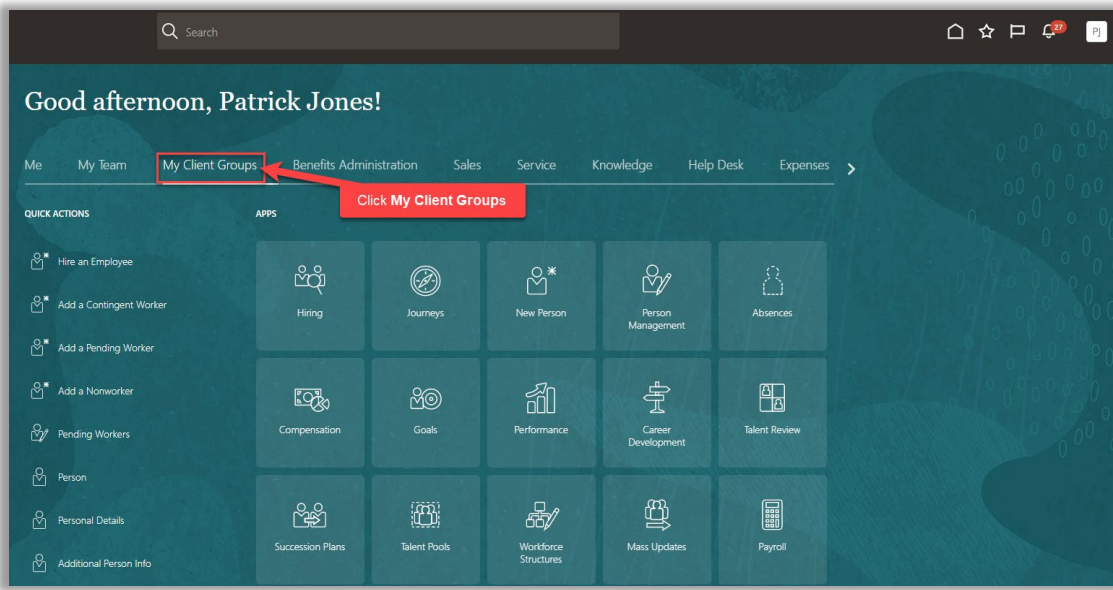
Update the Plan Enrollment **Start Date** and click **Submit**



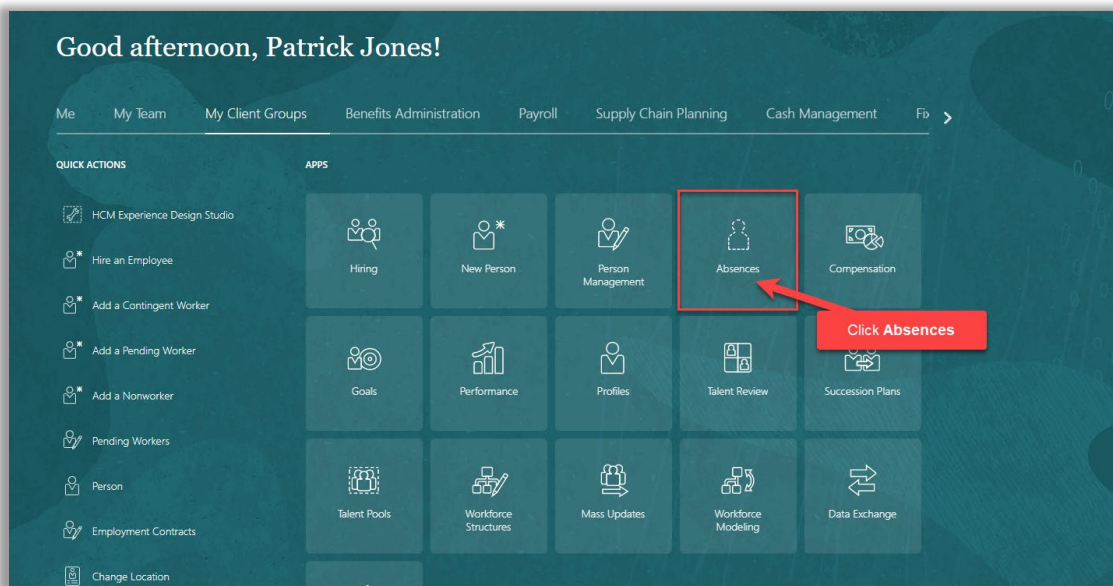
Review Accrual Rates

Navigation: Home>My Client Groups>Absences>Absence Records>Search Employee>Select Plan>Enter Balance Calculation Date>Arrow

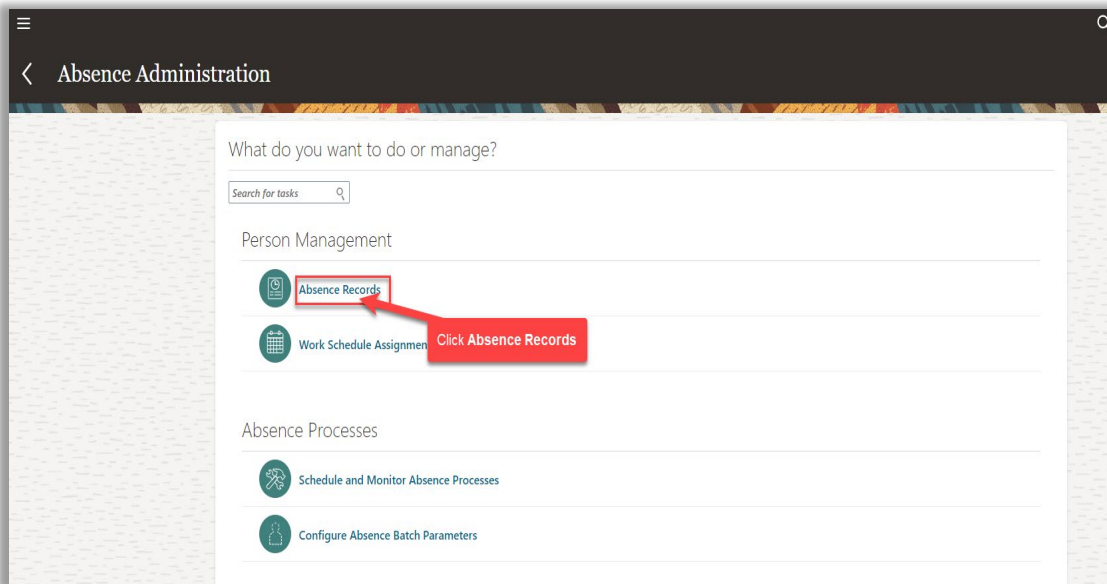
From the home screen, click **My Client Groups**



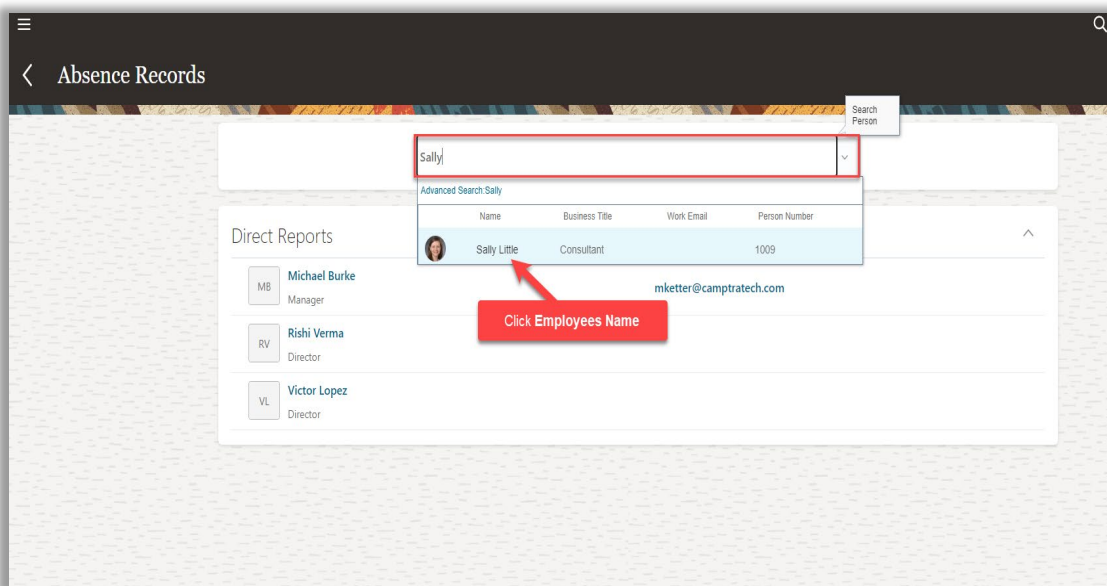
Next, click **Absences**



Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



Under Plans, click the **Plan Name**

Manage Absences and Entitlements ©
Sally Little 1009

Existing Absences ⓘ

View ▾ Add % Recalculate ▾ Time Period Last 6 months ▾ Type ▾ Status ▾ ⓘ Detach

Dates	Employer	Type	Assignment	Duration	Status	Processing Status	Actions
No data to display.							

Plan Participation ⓘ

Plan Balances

View ▾ Accruals ▾ Enrollments and Adjustments ▾ Status Active ▾ ⓘ

Plan	Assignment	Type	Status	Enrollment Start Date	Enrollment End Date	Balance Calculation Date	Balance
Paid Time Off	Consultant	Accrual	Active	6/11/17	1/16/21	1/16/21	240 Hours
Sick Leave	Consultant	Accrual	Active	1/16/21	1/31/21	1/31/21	120 Hours

Qualified Entitlements

View ▾ Balance As-of Date 9/29/22 ⓘ ⓘ

Plan	Plan Period	Payment Percentage	Qualified Entitlement	Used	Remaining
FMLA	9/30/21 - 9/2...	0.0	480 Hours	0 Hours	480 Hours

Enter the **Balance Calculation Date** and then, click the **Arrow**

Accrual Plan Balance : Sick Leave

Balance Calculation Date 9/22/22 ⓘ ⓘ

Plan Period Start Date 1/1/22

Balance 183.27 Hours

Summary Details

View ▾ ⓘ Detach

Date	Type	Additional Information	Hours	Status
8/31/22	Periodic accrual		3.33	Projected
7/31/22	Periodic accrual		3.33	Projected
6/30/22	Periodic accrual		3.33	Projected
5/31/22	Periodic accrual		3.33	Projected

OK

Scroll down to view the **Plan Details**. We can review the accrual rates under the **Hours** column as well as the **Date** in which the accrual is applied

Accrual Plan Balance : Sick Leave

Balance Calculation Date: 9/22/22

Plan Period Start Date: 1/1/22

Balance: 183.27 Hours

Summary Details

View [icon] Detach

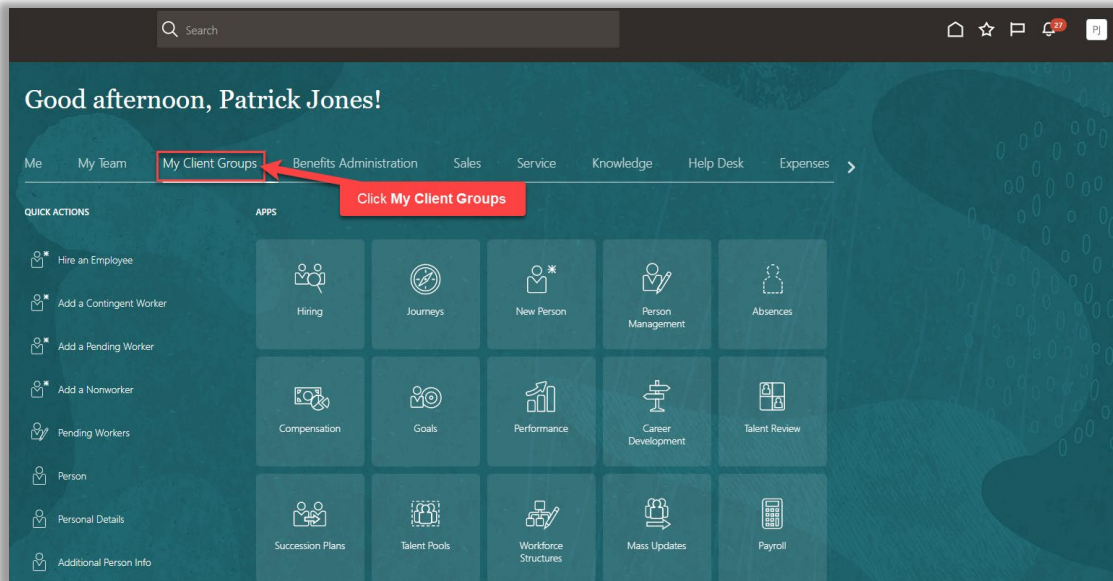
Date	Type	Additional Information	Hours	Status
8/31/22	Periodic accrual		3.33	Projected
7/31/22	Periodic accrual		3.33	Projected
6/30/22	Periodic accrual		3.33	Projected
5/31/22	Periodic accrual		3.33	Projected

OK

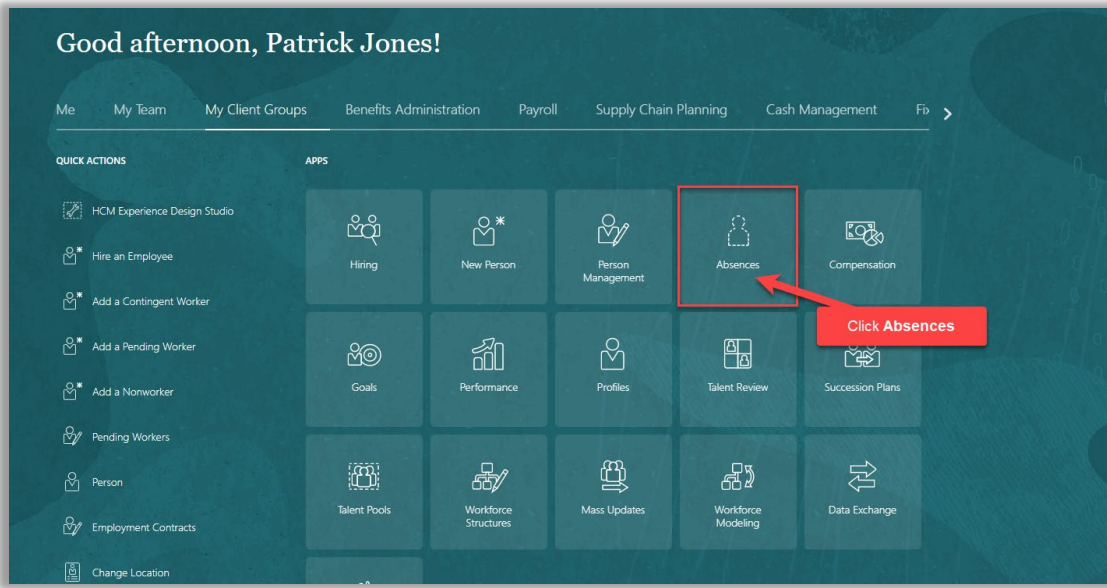
Run Accruals Process For An Employee

Navigation: Home>My Client Groups>Absences>Absence Records>Search Employee>Accruals>Run Accruals for Selected Plan>Enter Date>Submit

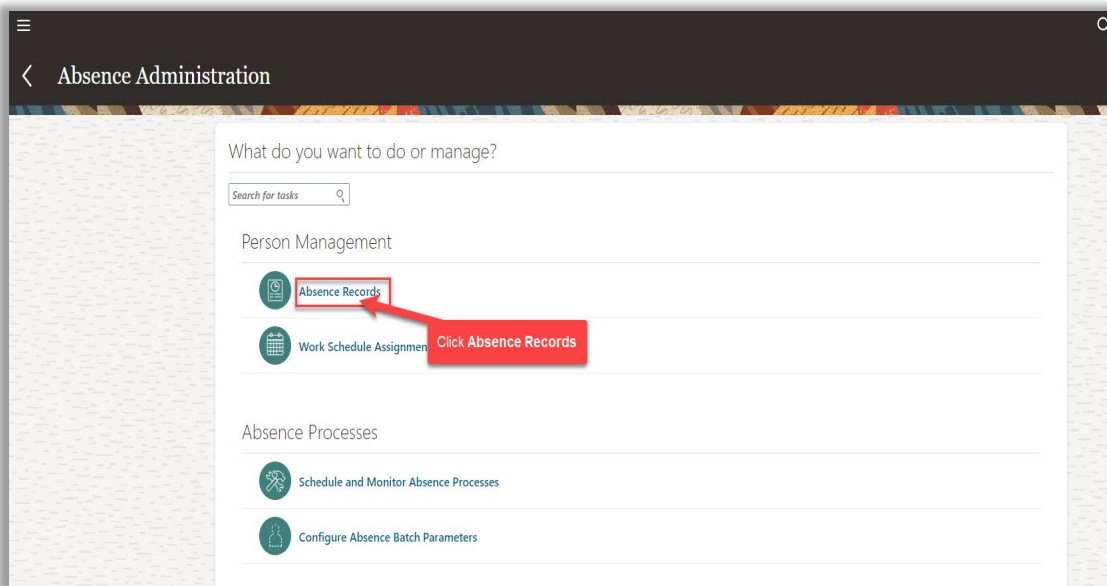
From the home screen, click **My Client Groups**



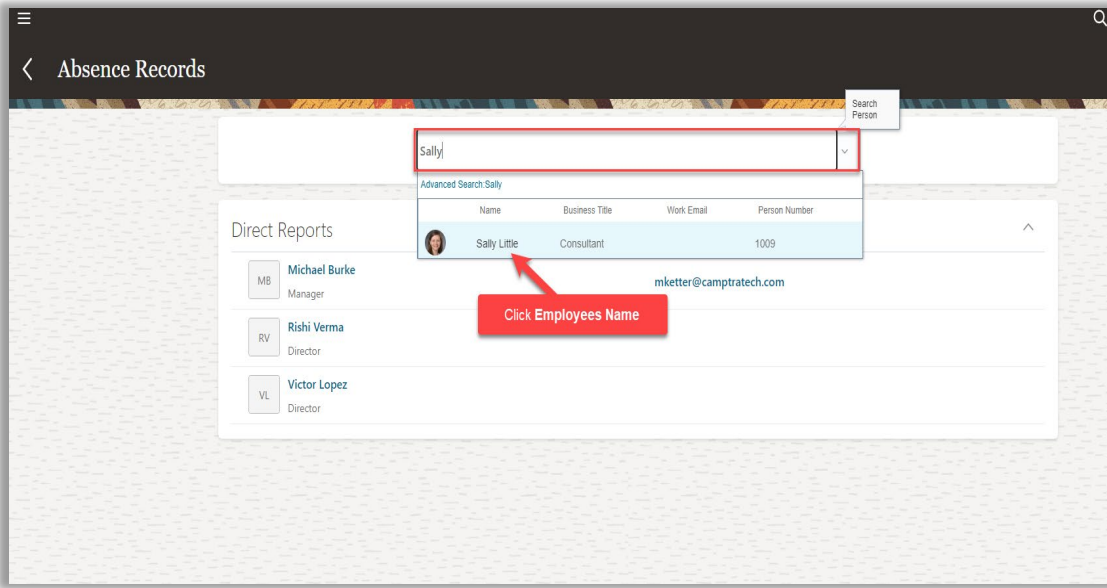
Next, click **Absences**



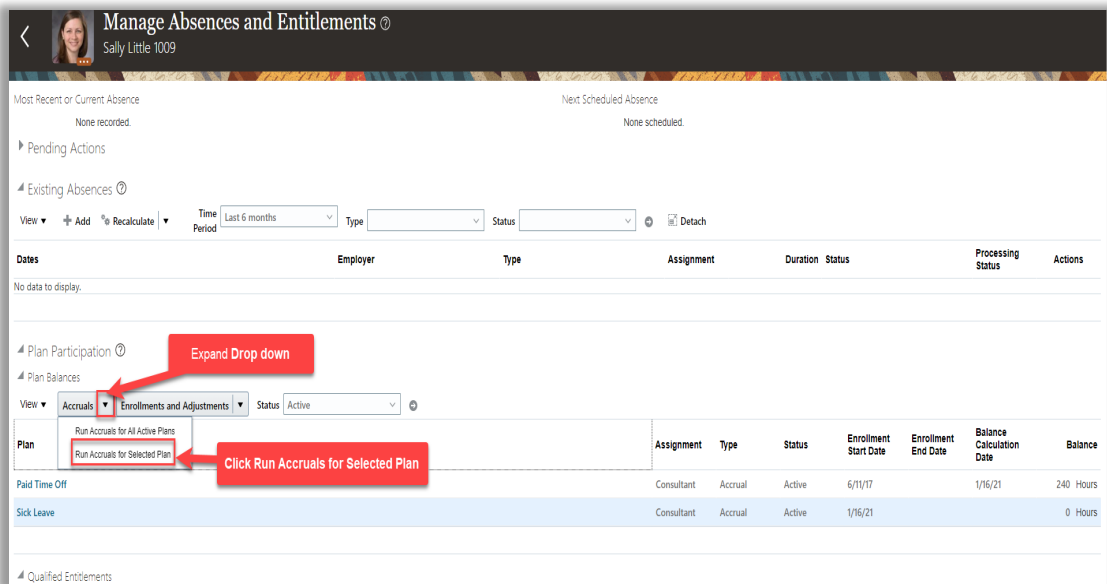
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



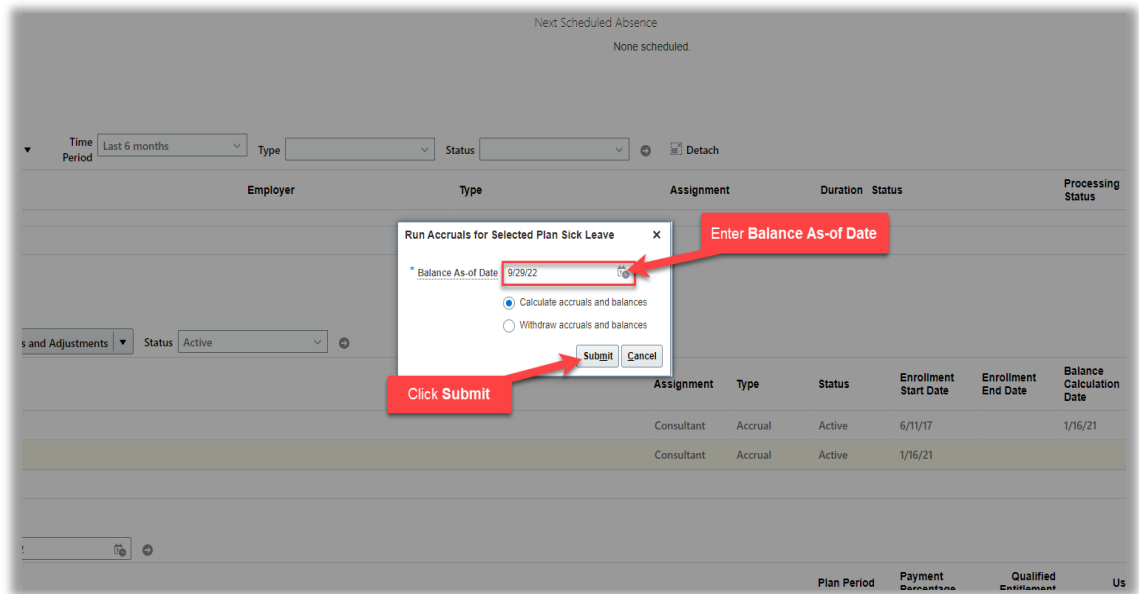
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



After a balance adjustment, we need to **Run Accruals for Selected Plan**. We can **Run Accruals for All Active Plans**, if needed. As a note, this process will only update the balance for one pay period; if we need to update the balance for multiple pay periods, follow the **Calculate Accruals & Balance Process**. Highlight the row of the plan and click **Accruals**, then **Run Accruals for Selected Plan**



Enter the **Balance As-of Date** and click **Submit**

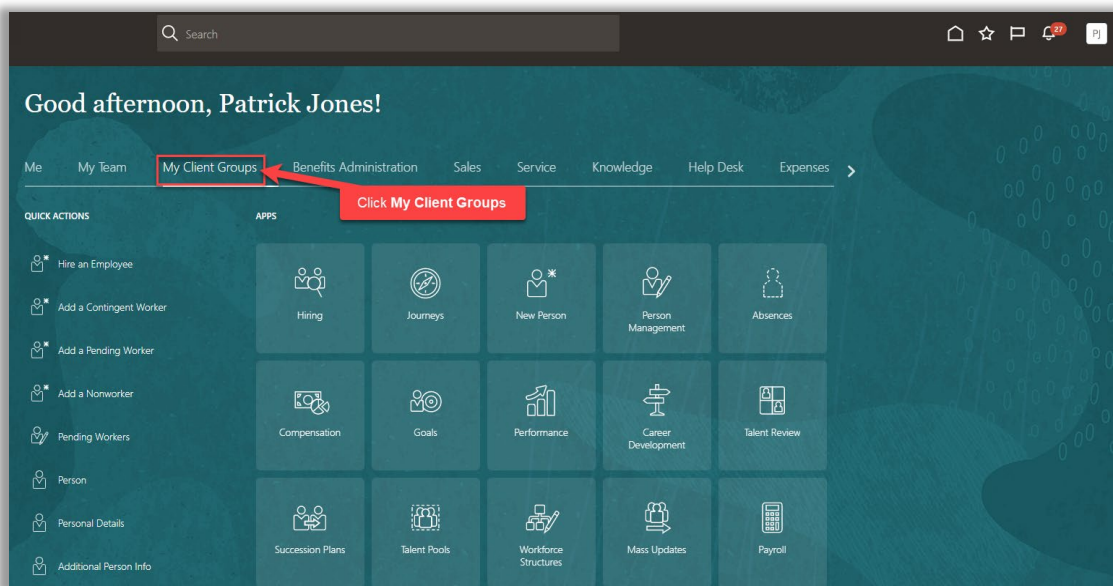


The **Plan Balance** has been updated.

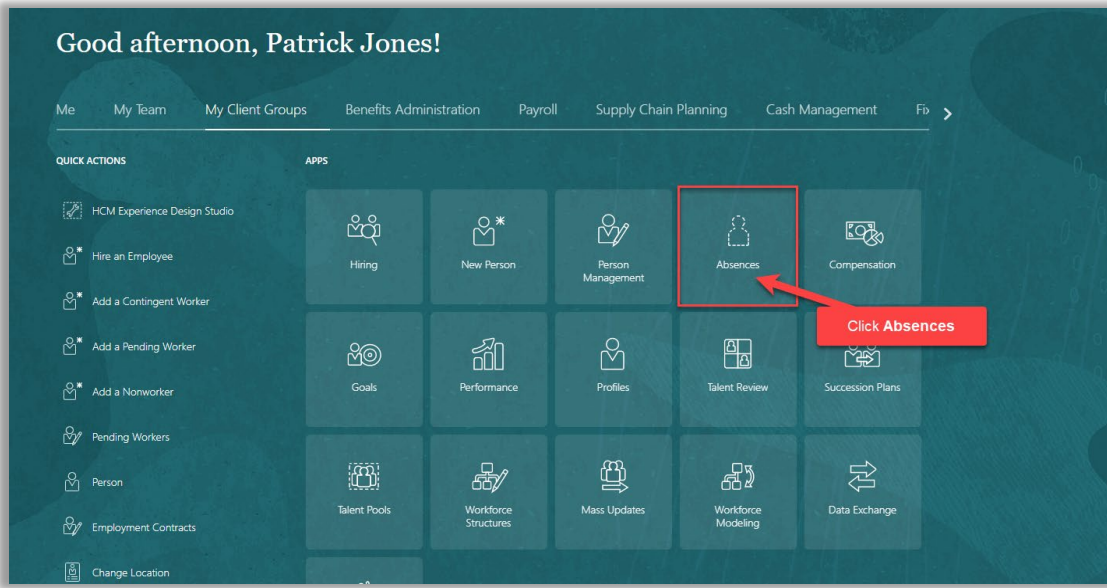
End Date A Plan

Navigation: Home>My Client Groups>Absences>Absence Records>Search Employee>Enrollment and Adjustments>Update Enrollment>Submit

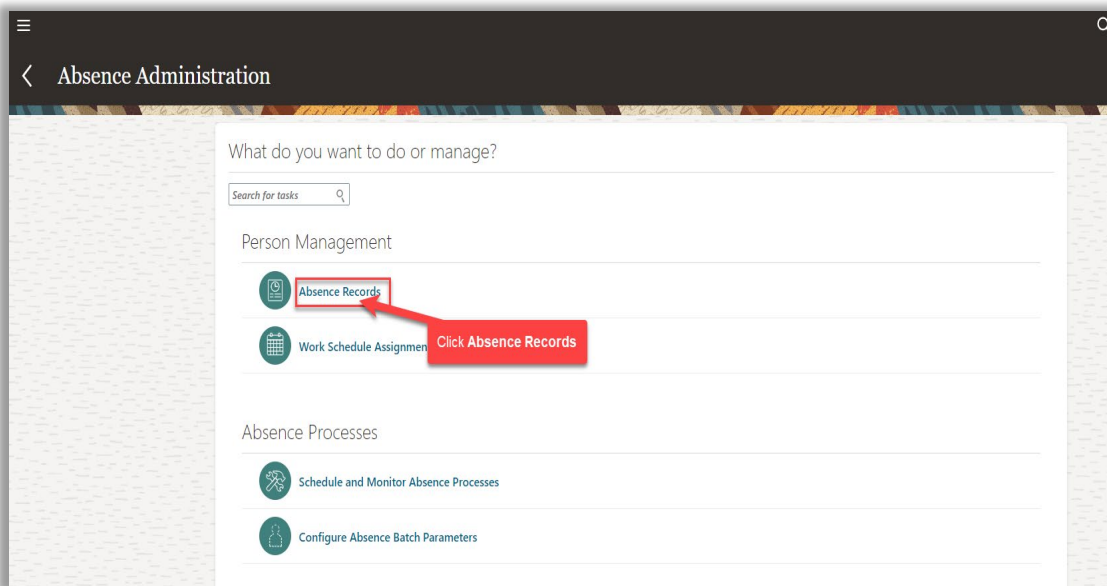
From the home screen, click **My Client Groups**



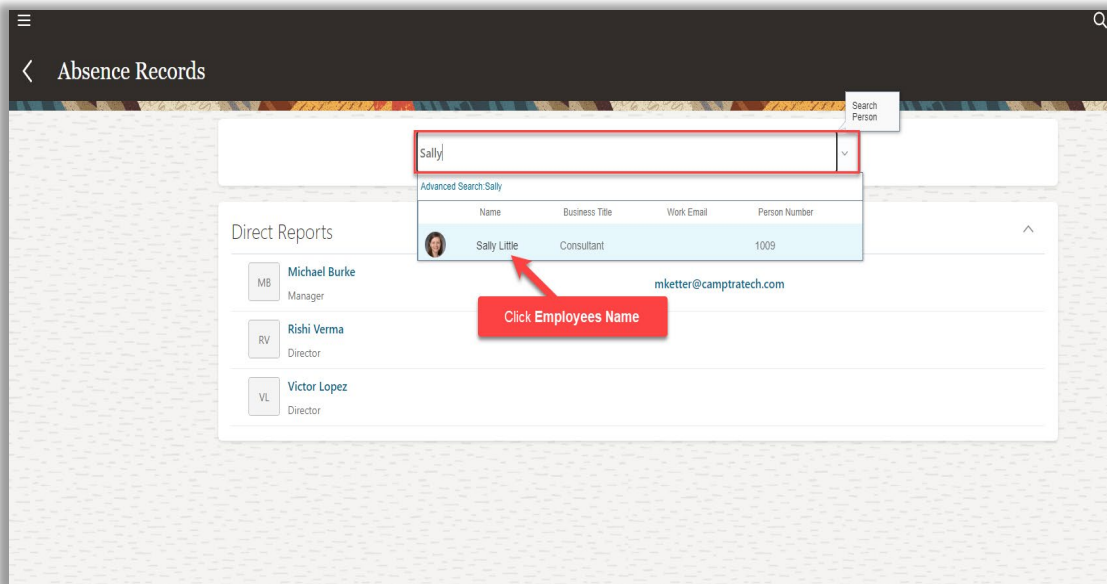
Next, click **Absences**



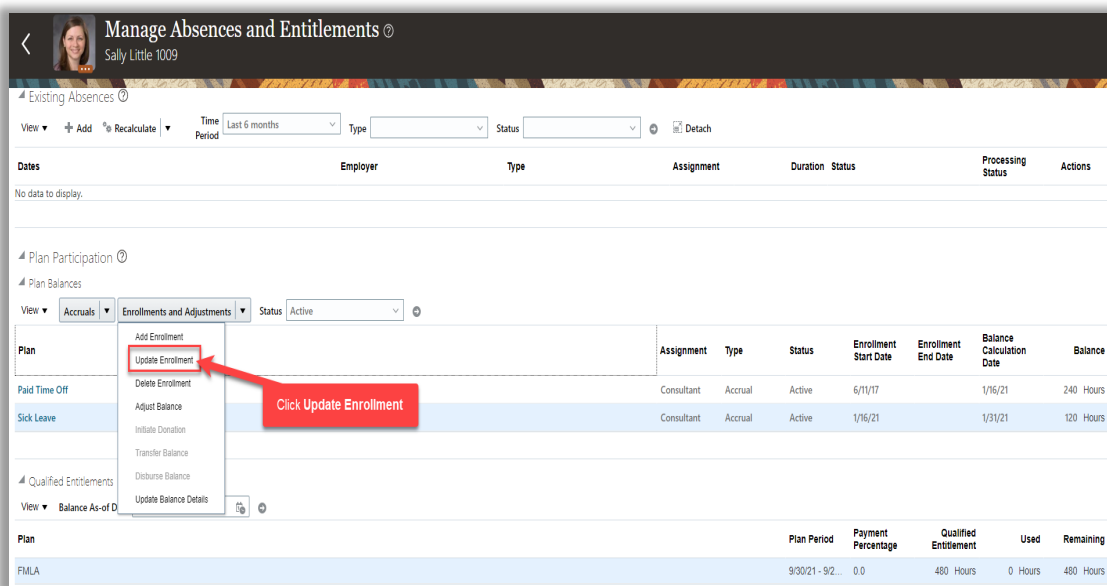
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



Under Plans, highlight the row of the plan and click **Enrollment and Adjustments** then, **Update Enrollment**



Update the Plan Enrollment **End Date** and click **Submit**

Update Enrollment : Sick Leave

* Start Date: 1/16/21

End Date: 9/29/22

Submit Cancel

Click Submit

Enter End Date

Employer	Type	Assignment	Duration	Status	Process Status

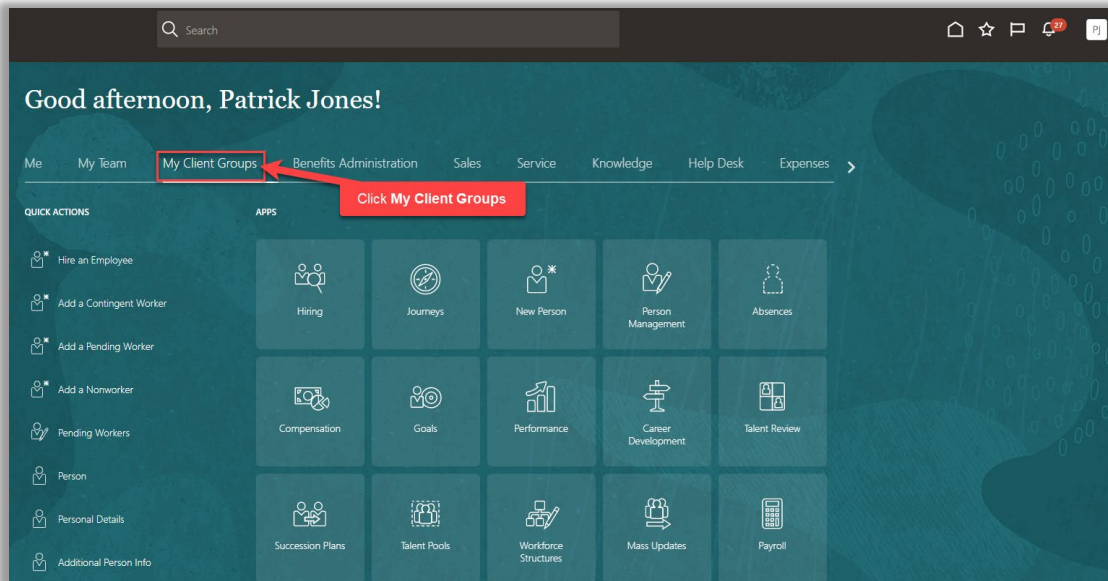
Assignment	Type	Status	Enrollment Start Date	Enrollment End Date	Balance Calculated Date
Consultant	Accrual	Active	6/11/17		1/16/21
Consultant			1/16/21		1/31/21

Plan Period	Payment Percentage	Qualified Entitlement
9/30/21 - 9/2...	0.0	480 Hours

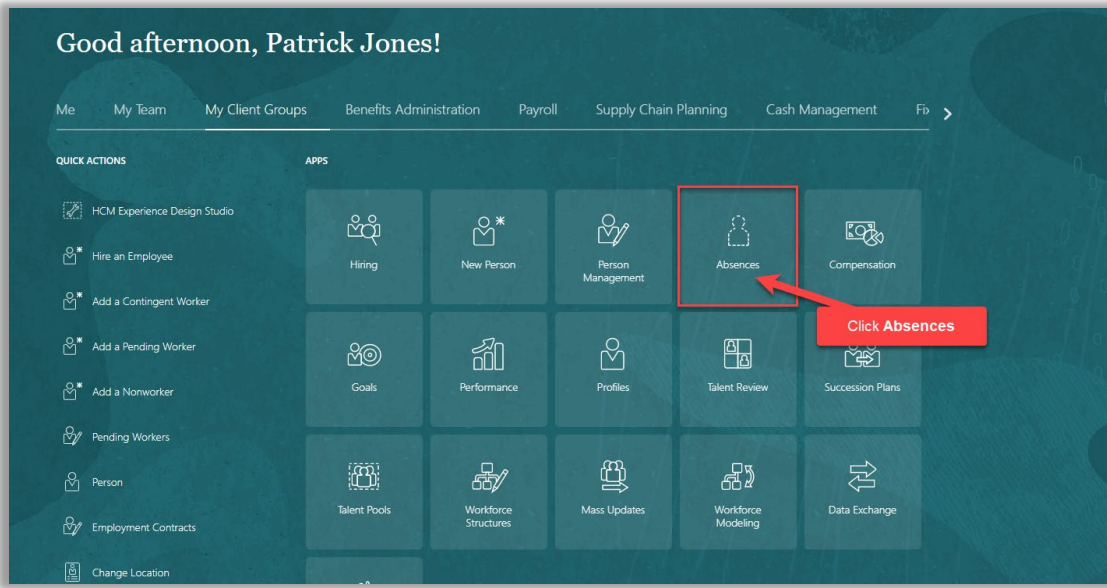
Delete Plan Enrollment

Navigation: Home>My Client Groups>Absences>Absence Records>Search Employee>Enrollment and Adjustments>Delete Enrollment>Submit

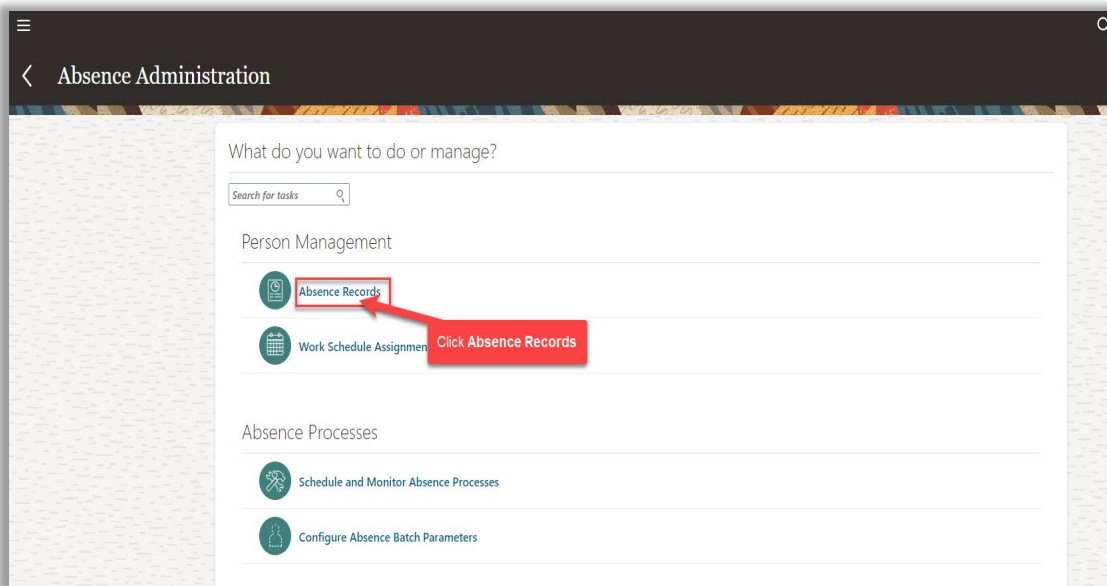
From the home screen, click **My Client Groups**



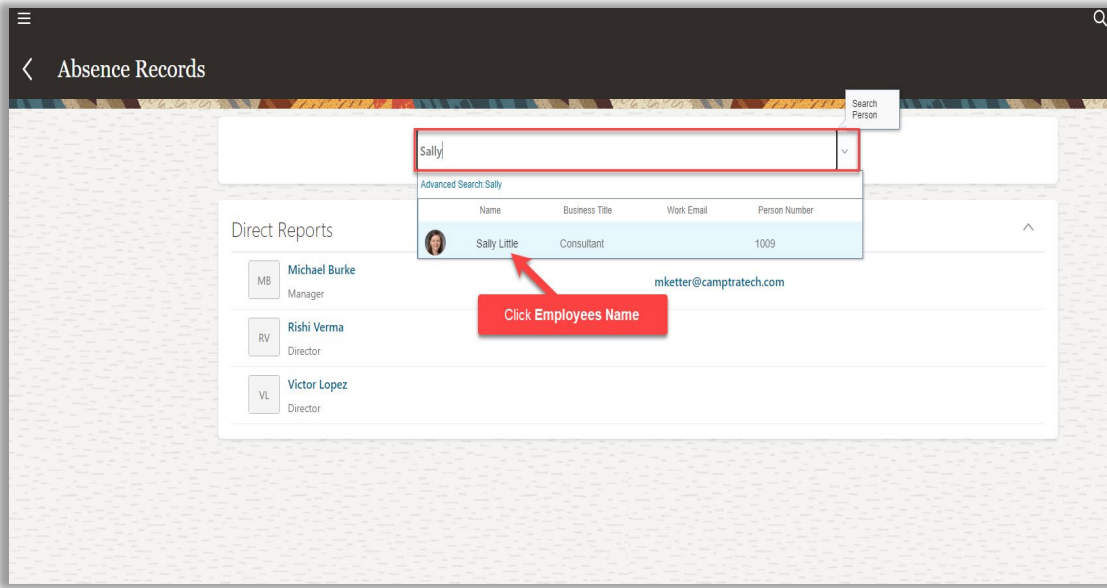
Next, click **Absences**



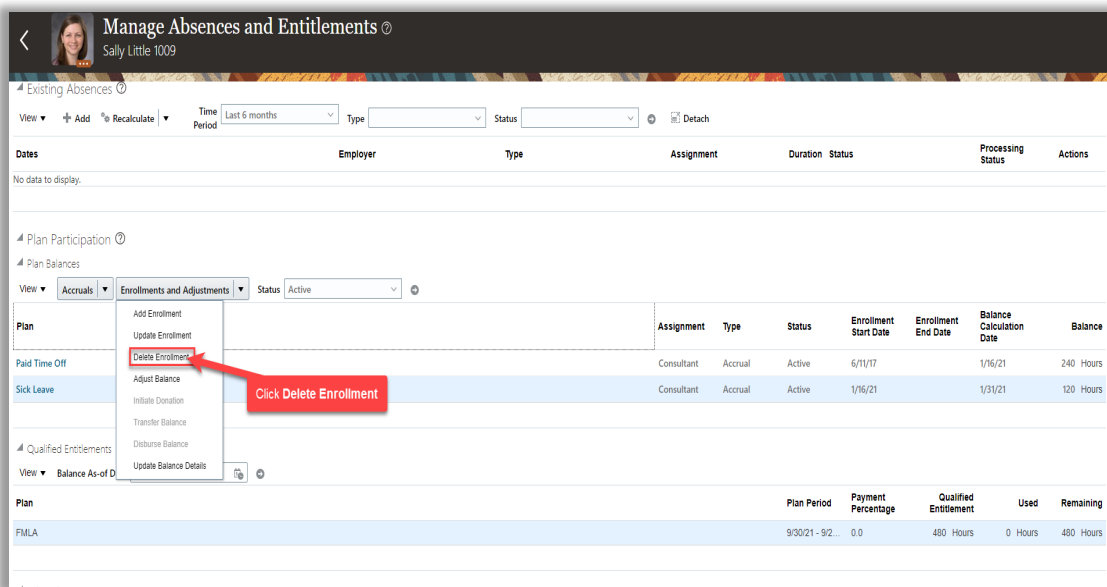
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



As a note, this process should only be used to remove a plan entered or added in error. If an employee is no longer eligible for the plan, the plan should be end dated with the end date being the plan ineligibility date. Under Plans, highlight the row of the plan and click **Enrollment and Adjustments** then, **Delete Enrollment**

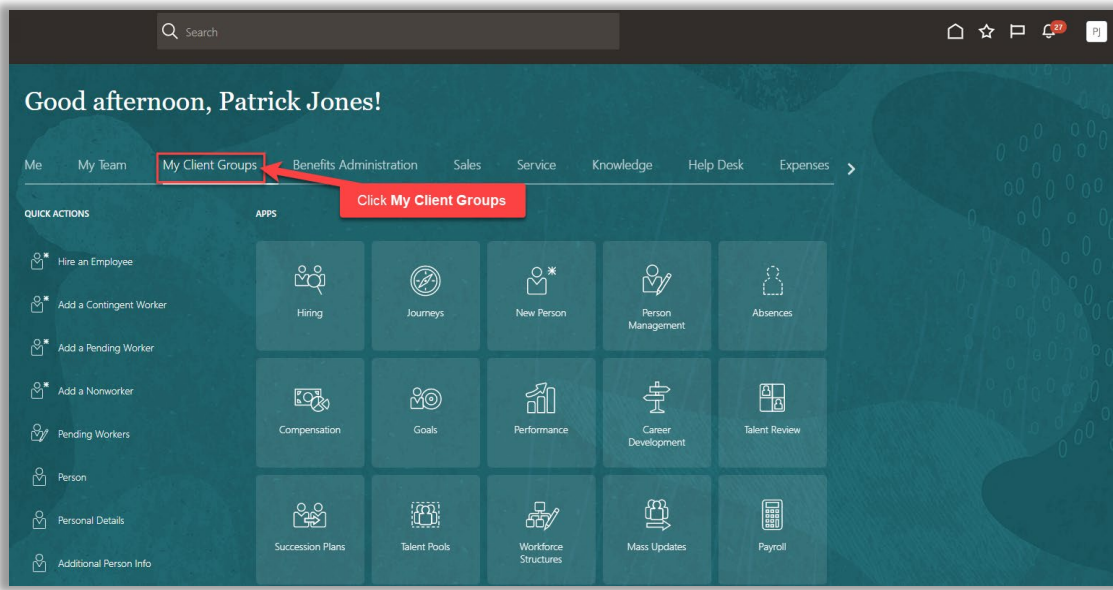


The **Absence Plan** will be deleted.

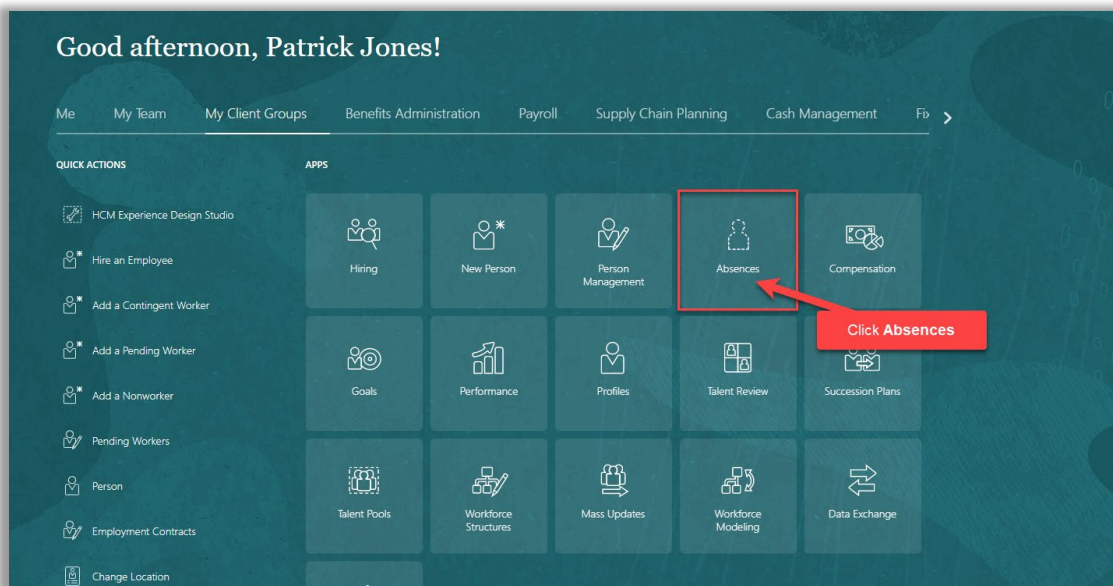
Enter An Absence Request On Behalf Of An Employee

Navigation: Home>My Client Groups>Absences>Absence Records>Search Employee>Add>Submit

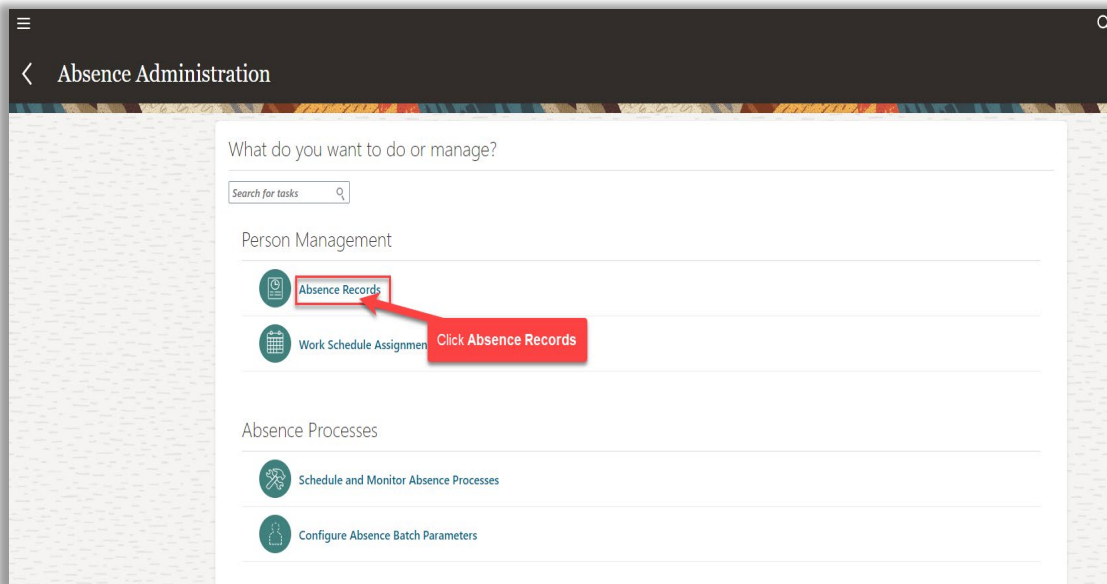
From the home screen, click **My Client Groups**



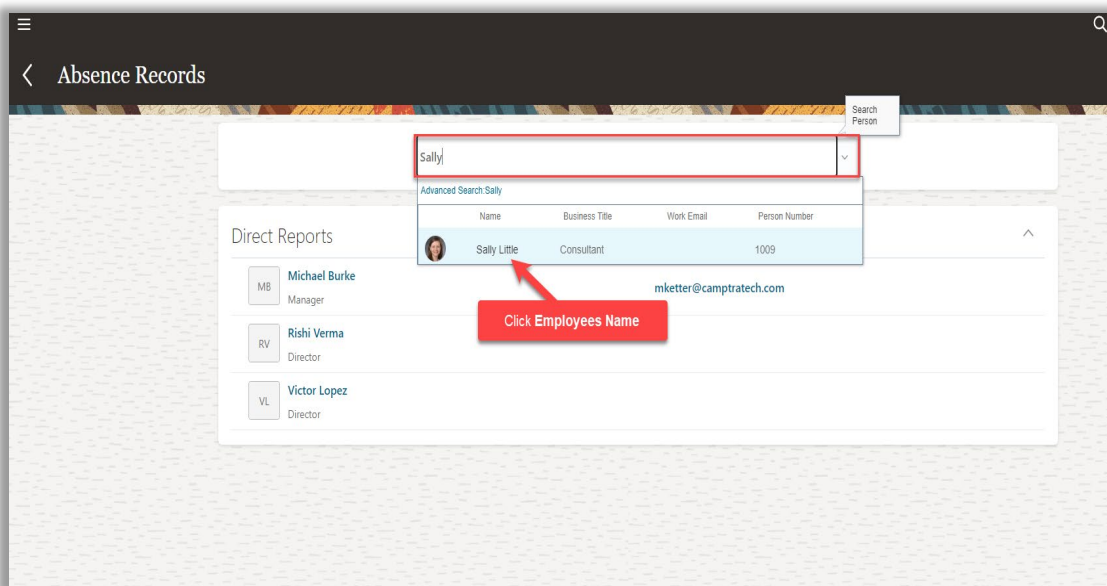
Next, click **Absences**



Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



Under **Existing Absences**, click **Add**

Manage Absences and Entitlements

Sally Little 1009

Absences

Most Recent or Current Absence: None recorded. Next Scheduled Absence: None scheduled.

Pending Actions

Existing Absences

View **Add** Recalculate Time Period: Last 6 months Type: Status: Detach

Dates **Employer** **Type** **Assignment** **Duration** **Status** **Processing Status**

No data to display.

Plan Participation

Plan Balances

View Accruals Enrollments and Adjustments Status: Active

Plan	Assignment	Type	Status	Enrollment Start Date	Enrollment End Date	Balance Calculation Date
Paid Time Off	Consultant	Accrual	Active	6/11/17		1/16/21
Sick Leave	Consultant	Accrual	Active	1/16/21		1/31/21

Expand the **Absence Type** drop down and select the **Plan**

Absence Administration

Sally Little 1009

*** Absence Type**

Expand Drop Down

Select Absence Type

FMLA - Sick
FMLA - Unpaid
FMLA - Vacation
Paid Time Off
Sick Leave

Save **Submit**

If the employee will only need to be off for one day, click **Single Day**, enter the **Date**, **Start Date** **Duration**, **Comments** and click **Submit**

Absence Administration
Sally Little 1009

* Absence Type: Paid Time Off | Advanced Mode

Basic Mode

Single day ☒ **Check Check box**

* Start Date: 10/3/22 **Enter Start Date**

End Date: 10/3/22

* Start Date Duration: 8 Hours **Enter Start Date Duration**

Duration: 8 Hours

Details | Plan Use | Action Items

Comments: [Text Area]

Legislative Information

Descriptive Information

Context Segment: [Dropdown]

Save | **Submit** **Click Submit**

If the employee will need to be off for more than one day, Enter the **Start Date**, **End Date**, **Start Date Duration**, **Comments** and click **Submit**

Absence Administration
Sally Little 1009

* Absence Type: Paid Time Off | Advanced Mode

Basic Mode

Single day ☐ **Enter Start Date**

* Start Date: 10/3/22 **Enter Start Date**

* End Date: 10/3/22 **Enter End Date**

* Start Date Duration: 8 Hours **Enter Start Date Duration**

Duration: 8 Hours

Details | Plan Use | Action Items

Comments: [Text Area]

Legislative Information

Descriptive Information

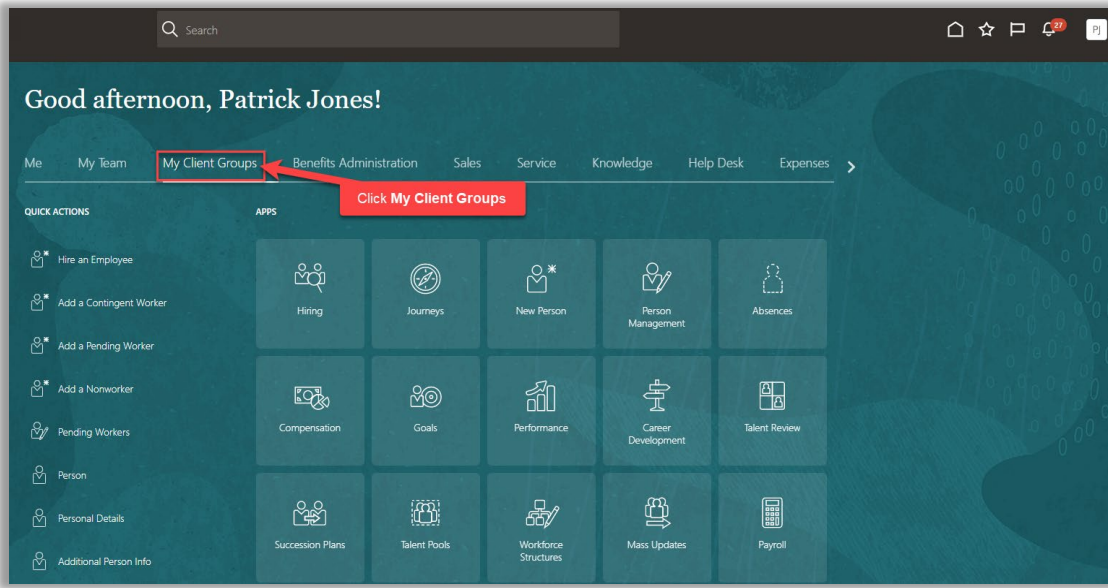
Context Segment: [Dropdown]

Save | **Submit** **Click Submit**

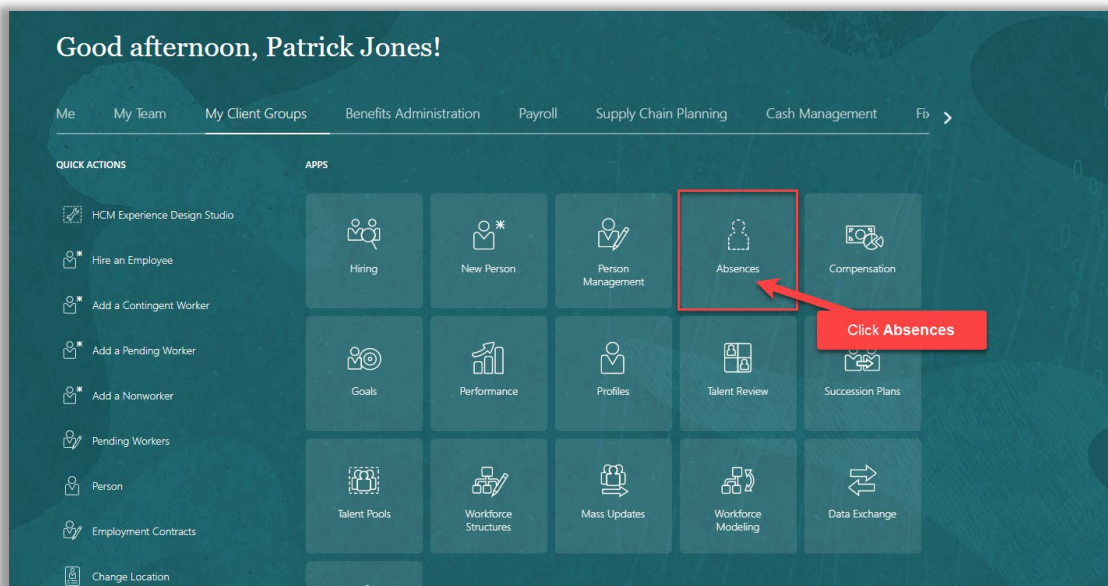
HR Approve Absence Request

Navigation: Home>My Client Groups>Absences>Absence Records>Search Employee>Select Absence Date>Submit

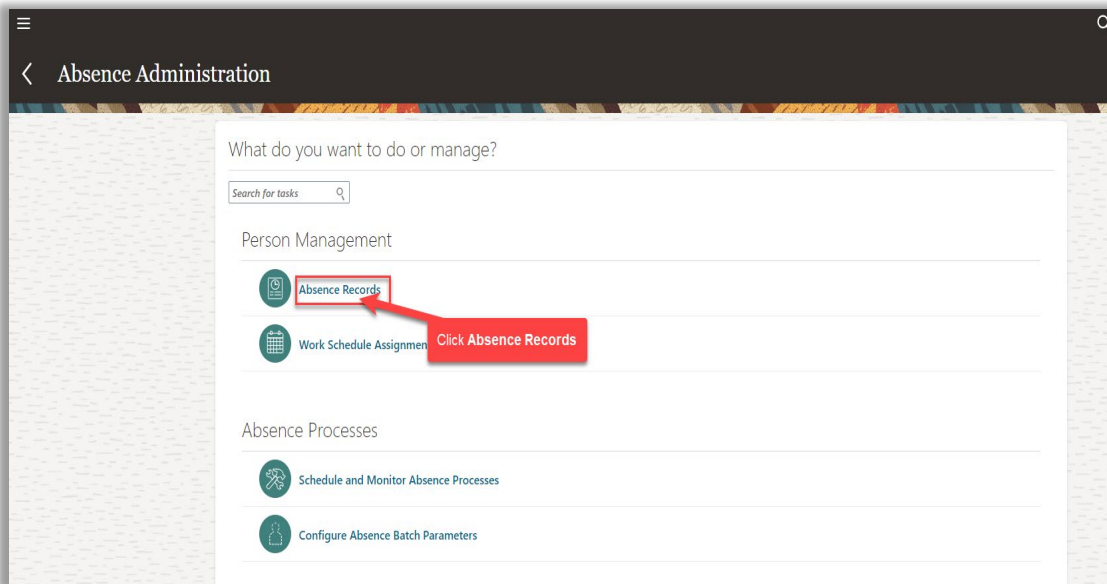
From the home screen, click **My Client Groups**



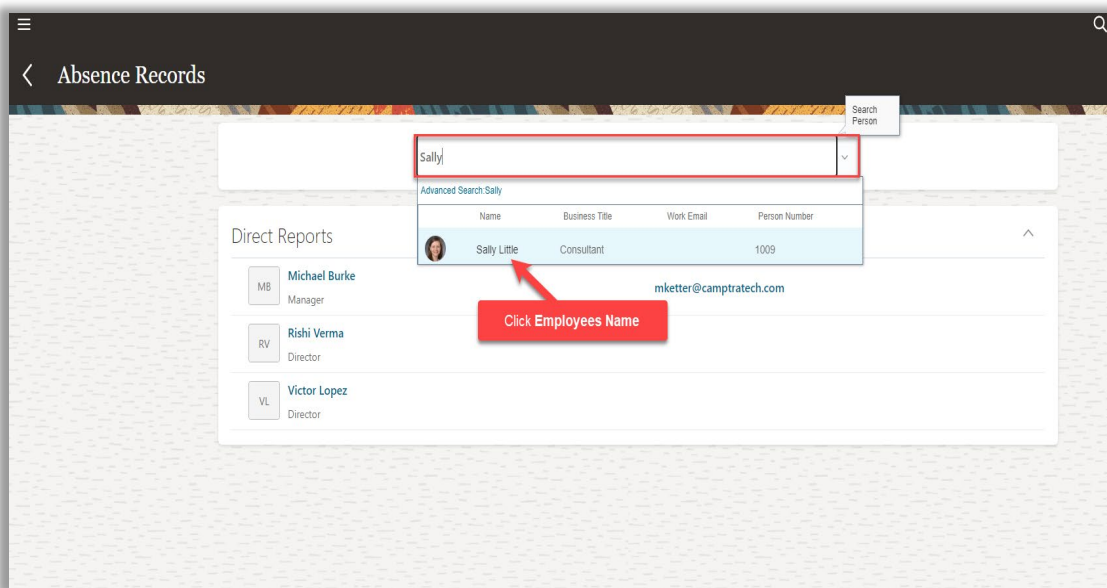
Next, click **Absences**



Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



Under **Existing Absences**, click Absence Request **Date**

Absences

Most Recent or Current Absence

Type: Vacation
Assignment: 1/4/22 - 1/5/22
Status: Completed
Duration: 16 Hours

Next Scheduled Absence

Type: Sick
Assignment: 9/30/22 - 9/30/22
Status: Awaiting approval
Duration: 8 Hours

Pending Actions

Existing Absences

View Add Recalculate Time Period: Last 6 months Type Status Detach

Dates	Employer	Type	Assignment	Duration	Status	Processing Status	Actions
9/30/22 - 9/30/22	USI Legal Entity	Sick		8 Hours	Awaiting approval	✓	

Click Absence Request Date

Plan Participation

Plan Balances

View

Type	Status	Enrollment Start Date	Enrollment End Date	Balance Calculation Date	Plan	Balance	Assignment
Accrual	Active	6/1/15		3/31/22	Sick	80 Hours	Vice Presiden...

Click **Submit**

vision

Absence Administration

Robert Jackman 541

Save Submit

Click Submit

Absence Type: Sick Advanced Mode

Basic Mode

Single day ☐

*Start Date: 9/30/22 *Start Time: 8:30 AM

*End Date: 9/30/22 *End Time: 4:30 PM

Duration: 8Hours

Details Linked Absences Plan Use Action Items

Reason: Illness

Add Attachment: None

Legislative Information

Descriptive Information

Context Segment

The leave request has been **Approved** and the Status is now **Scheduled**

Manage Absences and Entitlements
Robert Jackman 541

Absences
Most Recent or Current Absence
 Type: Vacation
 Assignment: 1/4/22 - 1/5/22
 Status: Completed
 Duration: 16 Hours

Next Scheduled Absence
 Type: Sick
 Assignment: 9/30/22 - 9/30/22
 Status: Scheduled
 Duration: 8 Hours

Existing Absences
 View: [Add] [Recalculate] [Time Period: Last 6 months] [Type:] [Status:] [Detach]

Dates	Employer	Type	Assignment	Duration	Status	Processing Status	Actions
9/30/22 - 9/30/22	US1 Legal Entity	Sick		8 Hours	Scheduled	✓	[Withdraw]

Plan Participation
 Plan Balances
 View: [Accruals] [Enrollments and Adjustments] [Status: Active]

Type	Status	Enrollment Start Date	Enrollment End Date	Balance Calculation Date	Plan	Balance	Assignment
Accrual	Active	6/1/25		3/31/22	Sick	80 Hours	Vice Presiden

Withdraw An Absence Request

Navigation: Home>My Client Groups>Absences>Absence Records>Search Employee>Actions>Withdraw>OK

From the home screen, click **My Client Groups**

Good afternoon, Patrick Jones!

Me My Team **My Client Groups** Benefits Administration Sales Service Knowledge Help Desk Expenses

QUICK ACTIONS

APPS

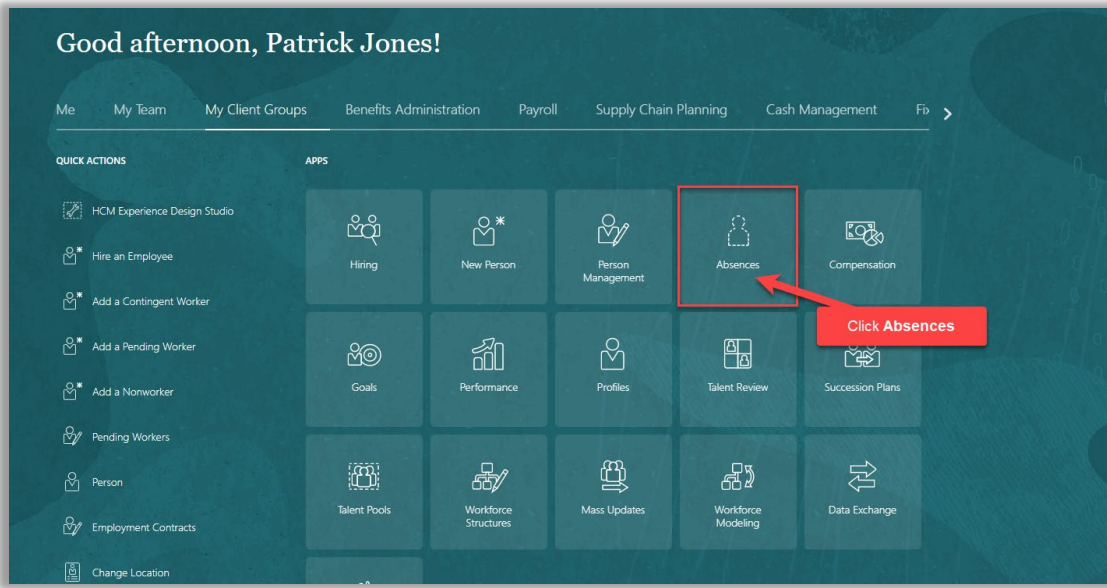
Click My Client Groups

Hiring Journeys New Person Person Management Absences

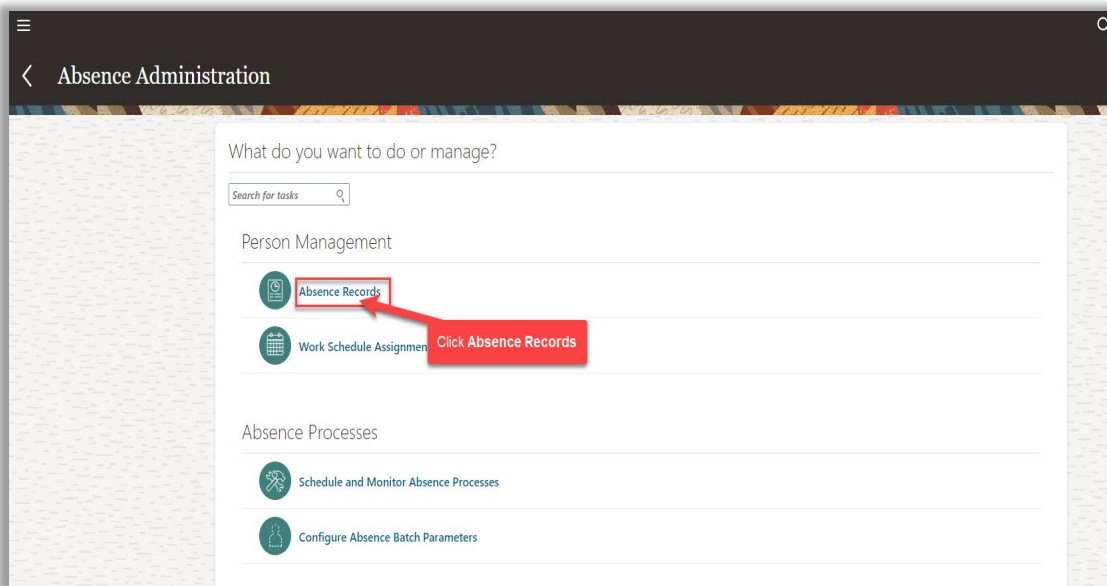
Compensation Goals Performance Career Development Talent Review

Succession Plans Talent Pools Workforce Structures Mass Updates Payroll

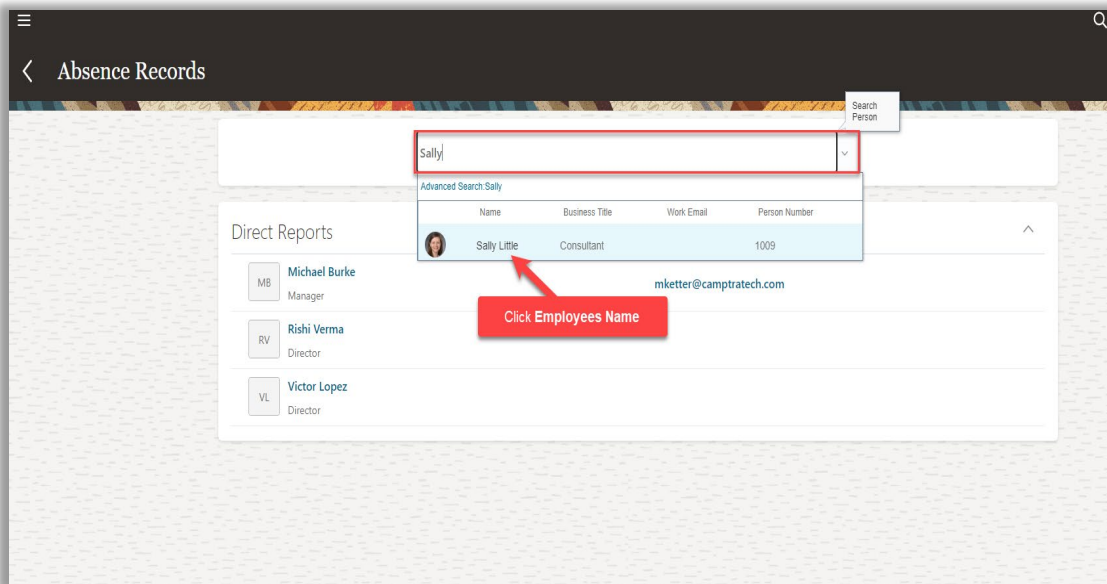
Next, click **Absences**



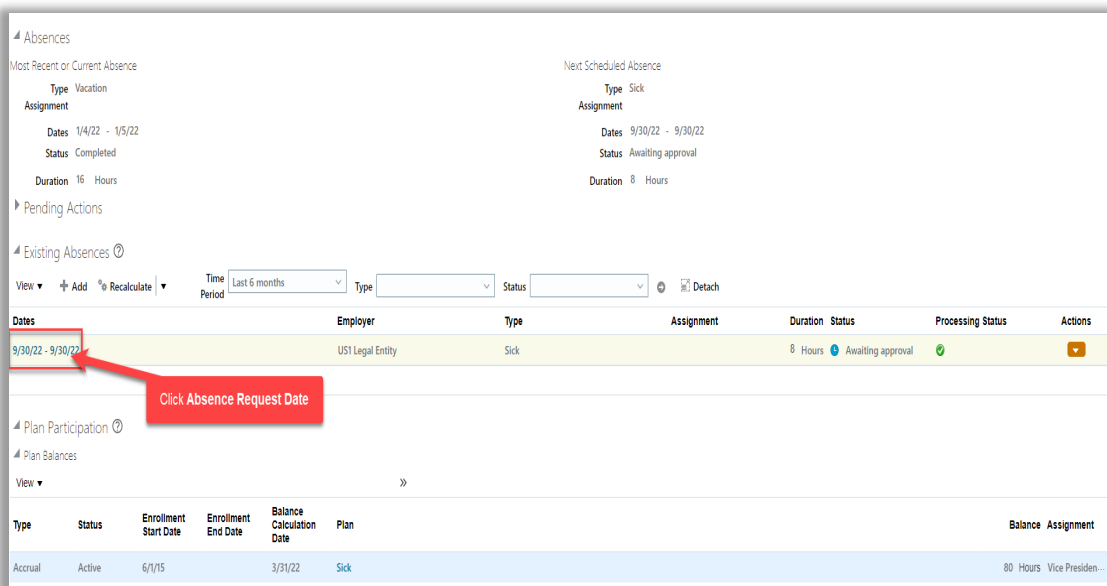
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



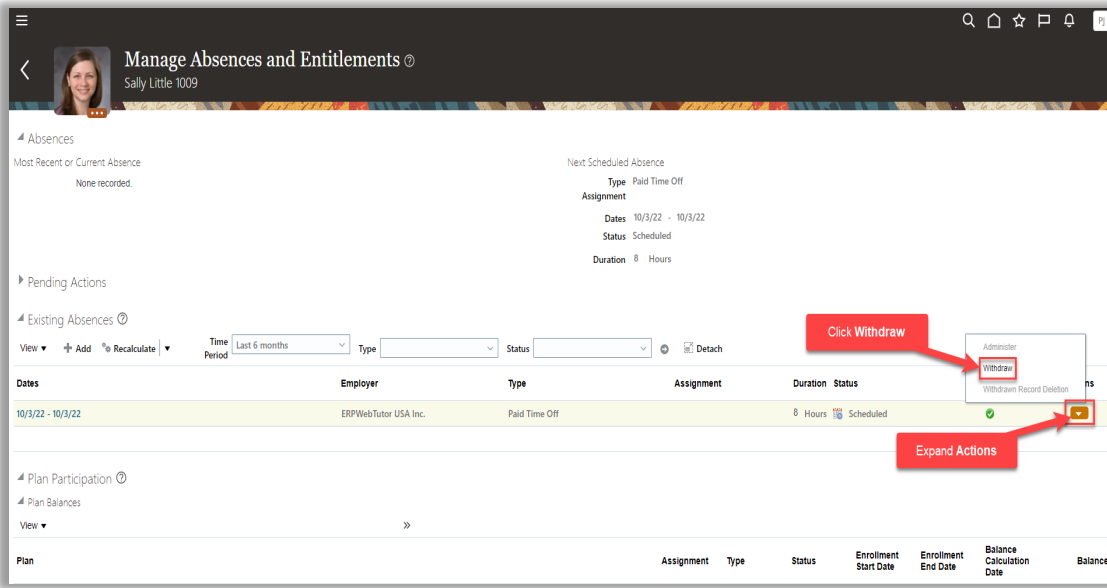
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



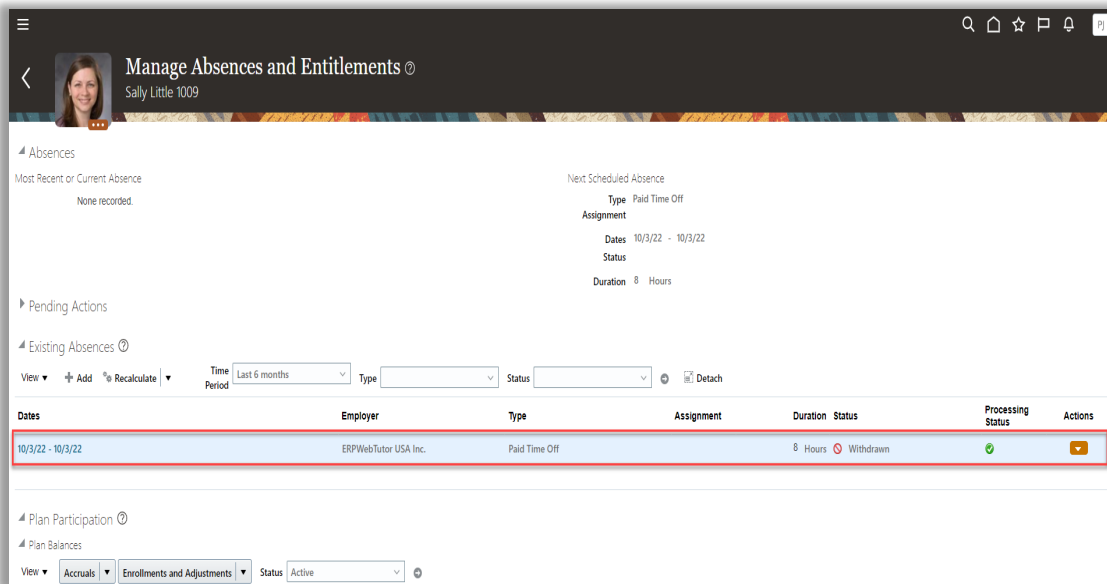
Under **Existing Absences**, click **Absence Request Date**



Click **Actions** then **Withdraw**



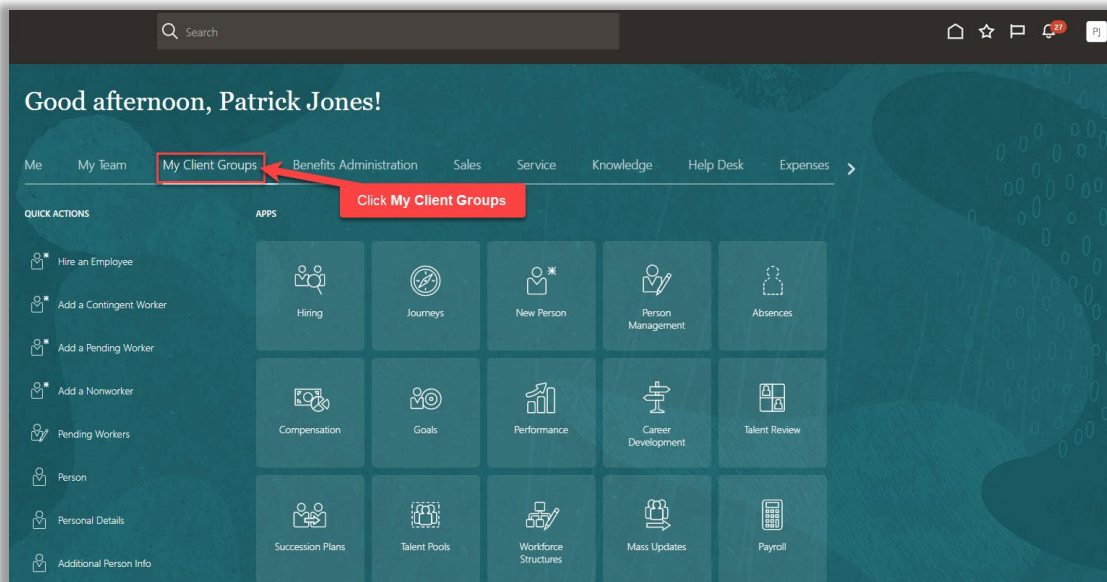
Click **OK**. The leave request has been **Withdrawn**



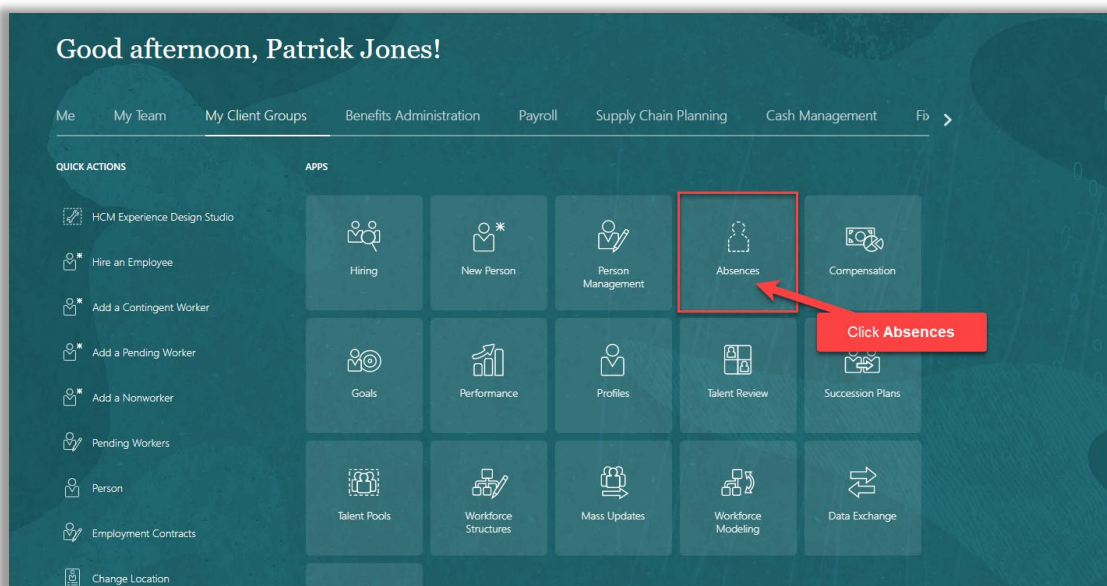
Calculate Accruals & Balance Process For Employee Population

Navigation: Home>My Client Groups>Absences>Schedule and Monitor Absence Processes>Enter Data>Submit>View Log

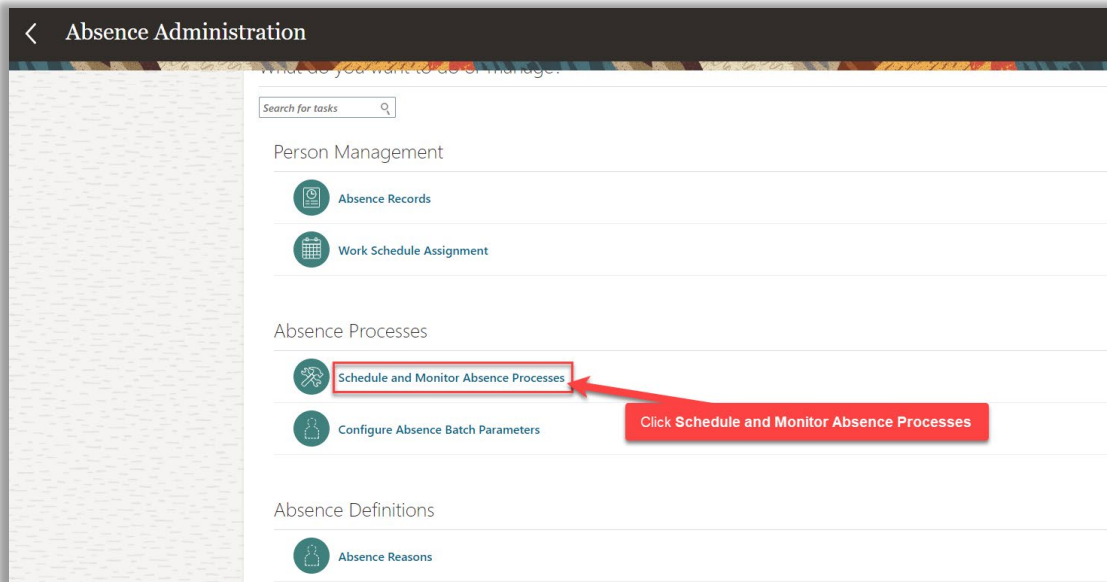
From the home screen, click **My Client Groups**



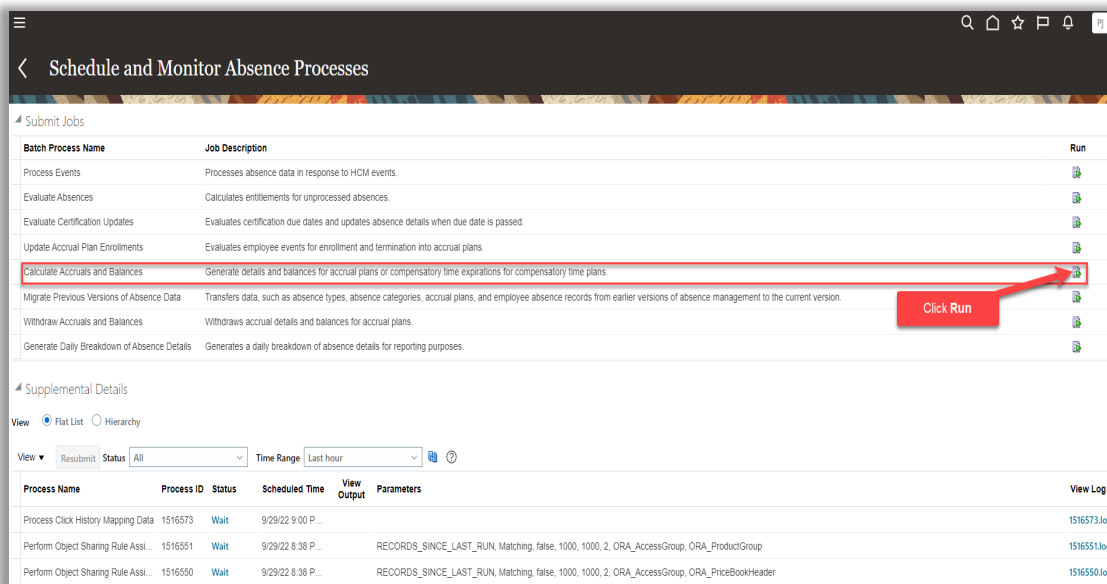
Next, click **Absences**



Click **Schedule and Monitor Absence Processes** under **Absence Processes**. If preferred, we can also search the words **Schedule and Monitor Absence Records** in the Search box at the top



Under **Submit Jobs** click **Run** across from **Calculate Accruals and Balances**



Enter the **Basic Options**. Enter the **Effective Date**; this is the date the accruals will be ran through from the last balance calculation date. We can select **Run as Test** to review the information in the log before updating the actual accrual and balances. We can enter a **Person** if we want to run this process for one Employee. If we do not enter a person, the process will run for all employees enrolled in all leave plans. Next, we can enter the **Absence Plan** for which we want to process the accruals and balances. Click **Submit** then **OK**

This process will be queued up for submission at position 1

Name: Calculate Accruals and Balances

Description: Generates details and balances for accrual plan...

Schedule: As soon as possible

Notify me when this process ends: ☐

Submission Notes:

Process Options:

Click Submit

Basic Options

Parameters

Effective Date: 9/29/22

Run as test: ☐

Include trace statements in audit log: ☐

Increment effective date: ☒

Plan Type: All

Basic Details

Person:

Business Unit: Camptna Org

Legal Employer: ERPWebTutor USA Inc.

Person Selection Rule:

Changes Since Last Run:

Payroll:

Legislative Data Group:

Payroll Relationship Group:

Absence Plan: Paid Time Off

Frequency:

We can monitor the Process under **Supplemental Details**. We can click **Refresh** to update the **Status**. Once the **Status** is **Succeeded**, click the **Paper** under **View Log** to view the details of the process

Schedule and Monitor Absence Processes

it Jobs

Process Name	Job Description
Events	Processes absence
Absences	Calculates entitlement
Certification Updates	Evaluates certification
Accrual Plan Enrollments	Evaluates enrollment
Accruals and Balances	Generate details
Previous Versions of Absence Data	Transfers data
Accruals and Balances	Withdraws accrual
Daily Breakdown of Absence Details	Generates a daily breakdown

Supplemental Details

Flat List ☐ Hierarchy ☐

Resubmit Status: All

Name	Process ID	Status
Accruals and Balances	1516609	Succeeded
Access Control Data	1516606	Wait
Click History Mapping Data	1516573	Wait
Object Sharing Rule Assi...	1516551	Wait

1516609 - Notepad

File Edit View

Accrual Process Job Parameters

```

*****
Plan name      :Paid Time Off
Person        :
Effective Date :2022-09-29
Test Run      :N
Trace         :N
Business Unit :Camptna Org
Legal Employer:ERPWebTutor USA Inc.
Person Selection Rule:
Payroll Definition:
Legislative Data Group:
Changes Event Type:
Payroll Relation Group:
Accrual Period Start Date:
Accrual Period End Date:
Increment Effective Date:Y
Plan Mode     :ORA_ANC_ALL_PLANS
*****
[2022-09-29 20:33:16.613] Entering: anc_process_utils.start_slaves
[2022-09-29 20:33:16.627] Time: 29/09/22 20:33:16
[2022-09-29 20:33:16.627] p_job_run_id:
[2022-09-29 20:33:16.627] p_person_id:
  
```

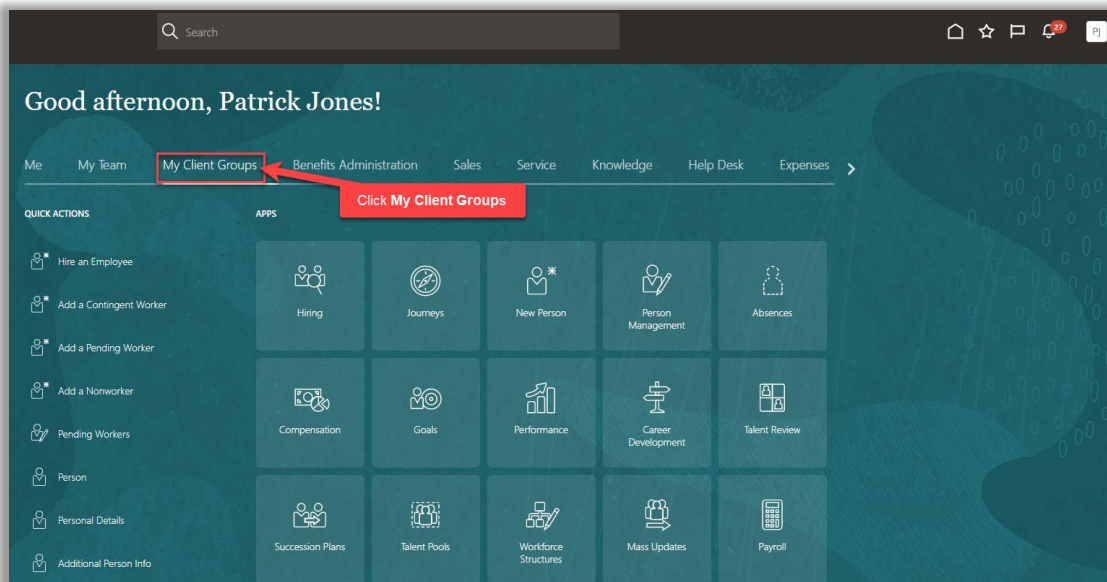
Ln 1, Col 1 100% Unix (LF) UTF-8

RECORDS_SINCE_LAST_RUN, Matching: false, 1000, 1000, 2, ORA_AccessGroup, ORA_ProductGroup

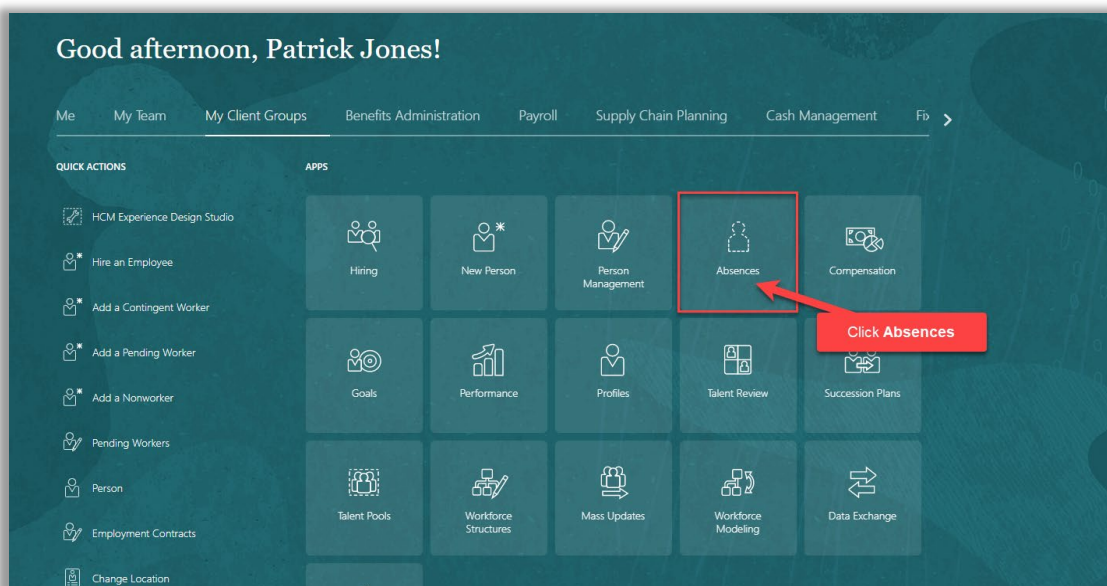
Schedule Calculate Absence Accrual Process

Navigation: Home>My Client Groups>Absences>Schedule and Monitor Absence Processes>Advanced>Enter Parameters>Enter Schedule>Enter Notification>Submit

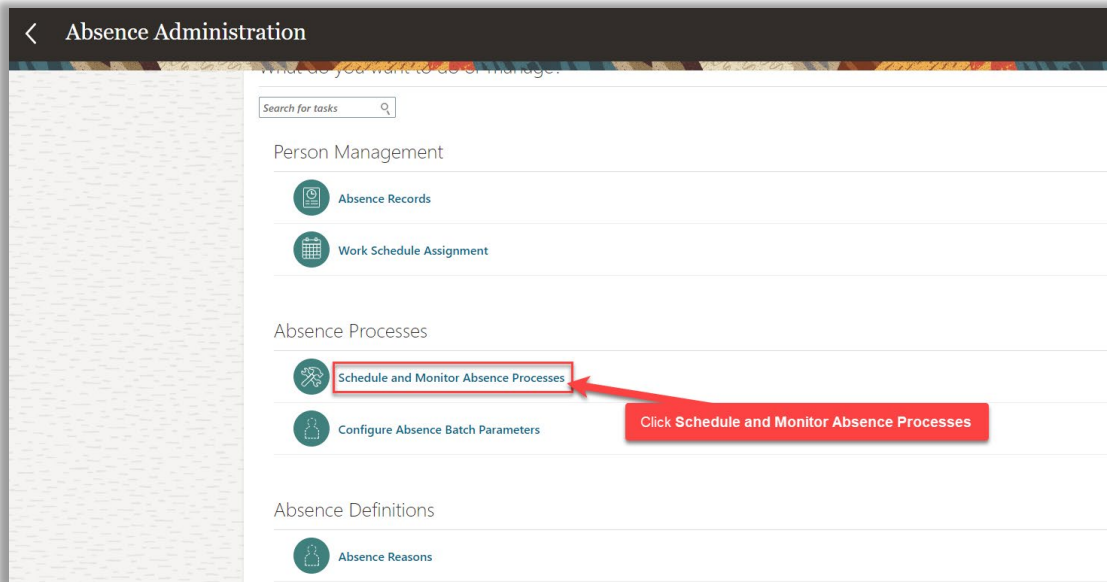
From the home screen, click **My Client Groups**



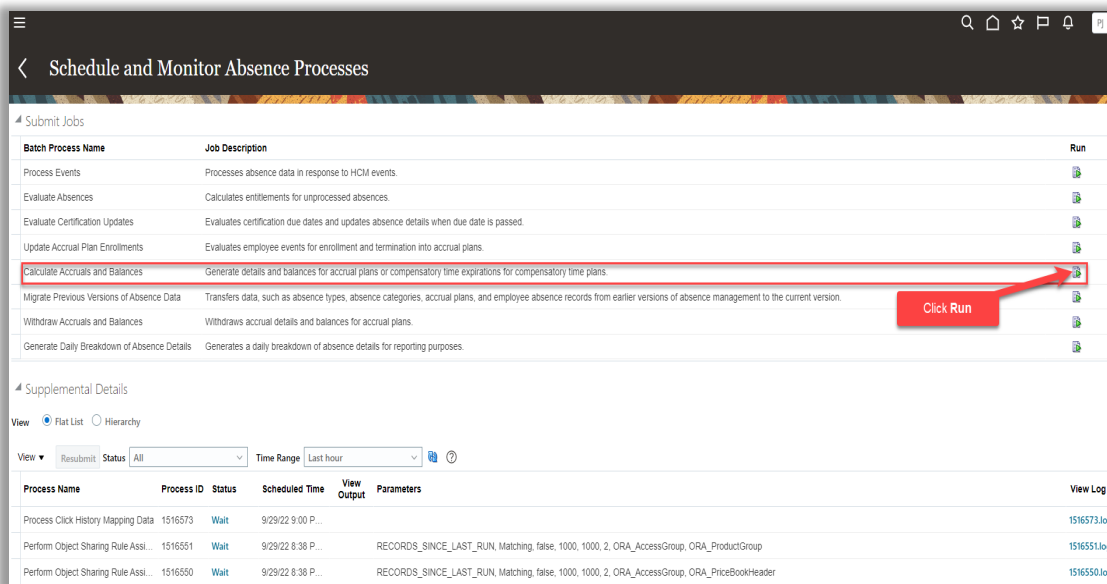
Next, click **Absences**



Click **Schedule and Monitor Absence Processes** under **Absence Processes**. If preferred, we can also search the words **Schedule and Monitor Absence Records** in the Search box at the top



Under **Submit Jobs** click **Run** across from **Calculate Accruals and Balances**



Click **Advanced**

This process will be queued up for submission at position 1

Name Calculate Accruals and Balances

Description Generates details and balances for accrual plan...

Schedule As soon as possible

☐ Notify me when this process ends

Submission Notes

Basic Options

Parameters

* Effective Date 9/29/22

☐ Run as test

☐ Include trace statements in audit log

☒ Increment effective date

Plan Type All

Basic Details

Person

Business Unit

Legal Employer

Person Selection Rule

Changes Since Last Run

Payroll

Legislative Data Group

Enter the **Basic Options**. Enter the **Effective Date**; this is the date the accruals will be ran through from the last balance calculation date. We can select **Run as Test** to review the information in the log before updating the actual accrual and balances. We can enter a **Person** if we want to run this process for one Employee. If we do not enter a person, the process will run for all employees enrolled in all leave plans. Next, we can enter the **Absence Plan** for which we want to process the accruals and balances. Click **Schedule**

This process will be queued up for submission at position 1

Name Calculate Accruals and Balances

Description Generates details and balances for accrual plan...

Schedule As soon as possible

☐ Notify me when this process ends

Submission Notes

Advanced Options

Parameters **Schedule** Notification

* Effective Date 9/29/22

☐ Run as test

☐ Include trace statements in audit log

☒ Increment effective date

Plan Type All

Basic Details

Person

Business Unit Campra Org

Legal Employer ERPWebTutor USA Inc.

Person Selection Rule

Changes Since Last Run

Payroll

Legislative Data Group

Payroll Relationship Group

Absence Plan Paid Time Off

On the **Schedule** tab, click **Using a schedule**. Select the **Frequency** from the drop down, enter the **Start Date** and **End Date**, click **Notify me when this process ends**. Click **Notification**

This process will be queued up for submission at position 1

Process Options Basic Submit

Name Calculate Accruals and Balances

Description Generates details and balances for accrual plan...

Schedule Using a schedule

Submission Notes

Notification is sent no matter if the process ends in error or not

Notify me when this process ends

Advanced Options

Parameters Schedule Notification

Run ☐ As soon as possible ☒ Using a schedule

Frequency Weekly

Weeks Between Runs 1

* Start Date 9/29/22 8:44 PM (UTC-00:00) Coordinated Universal Time (UTC)

* End Date 12/31/22 8:44 PM (UTC-00:00) Coordinated Universal Time (UTC)

Manage Times

Click Notification

Enter the Below Information

Click **Create** and enter the **Create Notification** details and Click **OK**

This process will be queued up for submission at position 1

Process Options Basic Submit

Name Calculate Accruals and Balances

Description Generates details and balances for accrual plan...

Schedule Using a schedule

Submission Notes

Notify me when this process ends

Advanced Options

Parameters Schedule Notification

View 1

Recipient No notification

Create Notification

* Address Type Email Address

* Recipient mikeetier@campratech.com

* Condition All

☒ All

☒ On Success

☒ On Warning

☒ On Error

Enter Create Notification Details

Click **Submit** then **OK**

This process will be queued up for submission at position 1

Name Calculate Accruals and Balances

Description Generates details and balances for accrual plan...

Schedule Using a schedule

☒ Notify me when this process ends

Submission Notes

Click Submit

Process Options Basic Submit

Advanced Options

Parameters Schedule Notification

View

Recipient	Condition
mkeller@camp...	On Success On Warning On Error

We can monitor the Process under **Supplemental Details**. We can click **Refresh** to update the **Status**. Once the **Status** is **Succeeded**, click the **Paper** under **View Log** to view the details of the process

Schedule and Monitor Absence Processes

Process Name Job Description

Process Name	Job Description	Process ID	Status	Time
Accruals and Balances	Generate details and balances for accrual plan...	1516609	Succeeded	9/29/22 8:38 P...
Access Control Data	Generates details and balances for access control data...	1516606	Wait	9/29/22 9:00 P...
Click History Mapping Data	Generates details and balances for click history mapping data...	1516573	Wait	9/29/22 8:38 P...
Object Sharing Rule Assi...	Generates details and balances for object sharing rule assi...	1516551	Wait	9/29/22 8:38 P...

Resubmit Status All

Supplemental Details

Flat List Hierarchy

1516609 - Notepad

```

File Edit View
Accrual Process Job Parameters
*****
Plan name      :Paid Time Off
Person        :
Effective Date :2022-09-29
Test Run      :N
Trace         :N
Business Unit :Camptra Org
Legal Employer:ERPWebTutor USA Inc.
Person Selection Rule :
Payroll Definition :
Legislative Data Group :
Changes Event Type :
Payroll Relation Group :
Accrual Period Start Date :
Accrual Period End Date :
Increment Effective Date :Y
Plan Mode      :ORA_ANC_ALL_PLANS
*****
[2022-09-29 20:33:16.613] Entering: anc_process_utils.start_slaves
[2022-09-29 20:33:16.627] Time: 29/09/22 20:33:16
[2022-09-29 20:33:16.627] p_job_run_id:
[2022-09-29 20:33:16.627] p_person_id:
  
```

Thank you for reviewing and using our guide; we hope you have found it helpful. If you have any questions on the content included in this guide, please contact our Training & Learning team at learn@camptratech.com

Version History	Revision Date	Author	Changes
Version 1.0		Megan Ketter	Initial Version