



2024

# Absence Admin Guide



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## 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](mailto:learn@camptratech.com).

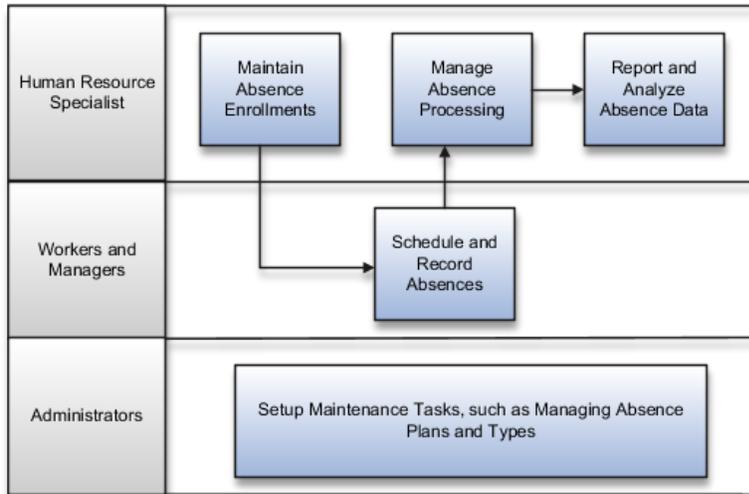
### How To Use This Guide

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 <b>Navigator</b> > <b>My Client Groups</b> > <b>Person Management</b>
Manager	Select <b>Navigator</b> > <b>My Team</b> > <b>Absences</b>
Worker	Select <b>Navigator</b> > <b>Me</b> > <b>Time and Absences</b>
Administrator	Select <b>Navigator</b> > <b>My Client Groups</b> > <b>Absences</b>

## 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, FML:A, 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**

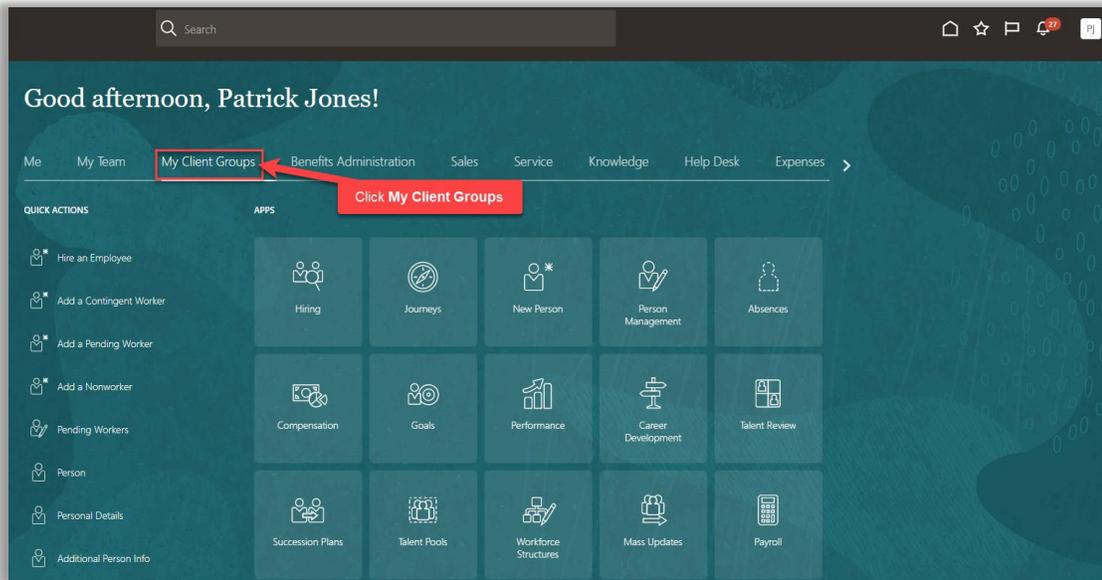
- ❖ A program that you schedule and run to process data and, if appropriate, generate output as a report. Also known as scheduled process.

# Absence Administration

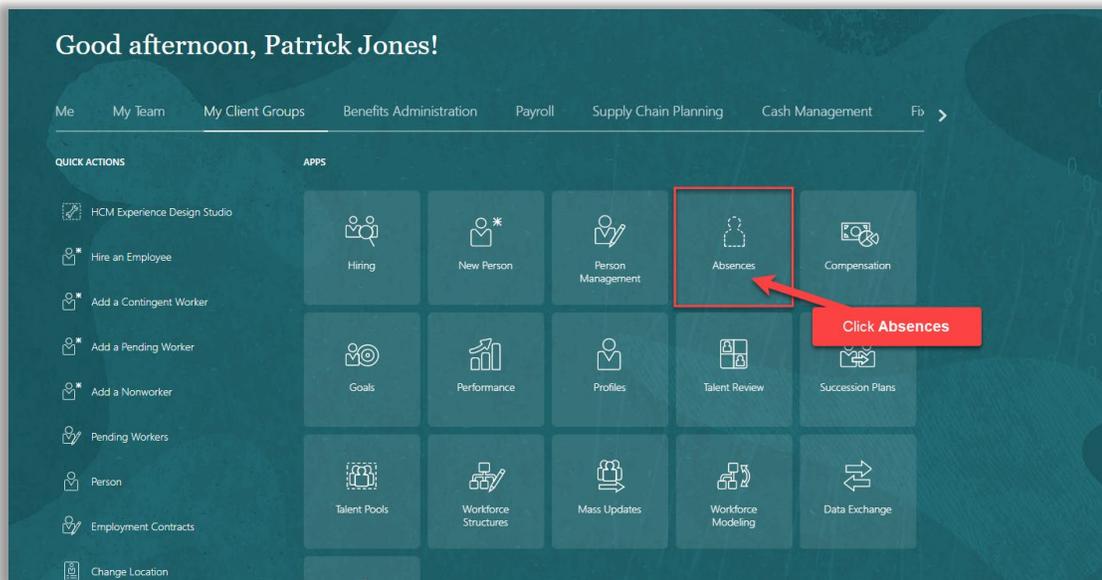
## Create Eligibility Profiles

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

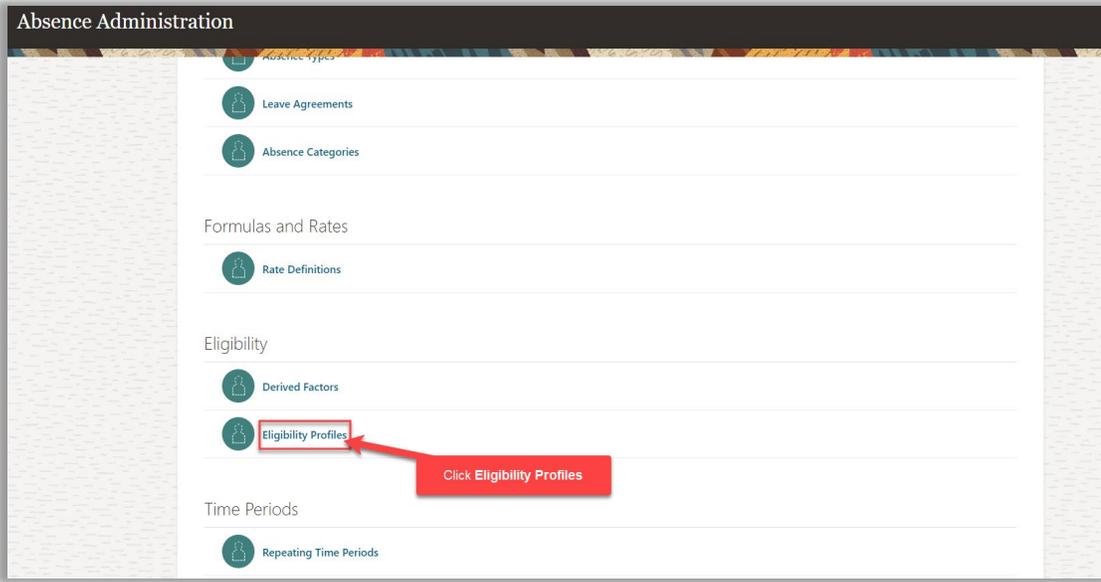
From the home screen, click **My Client Groups**



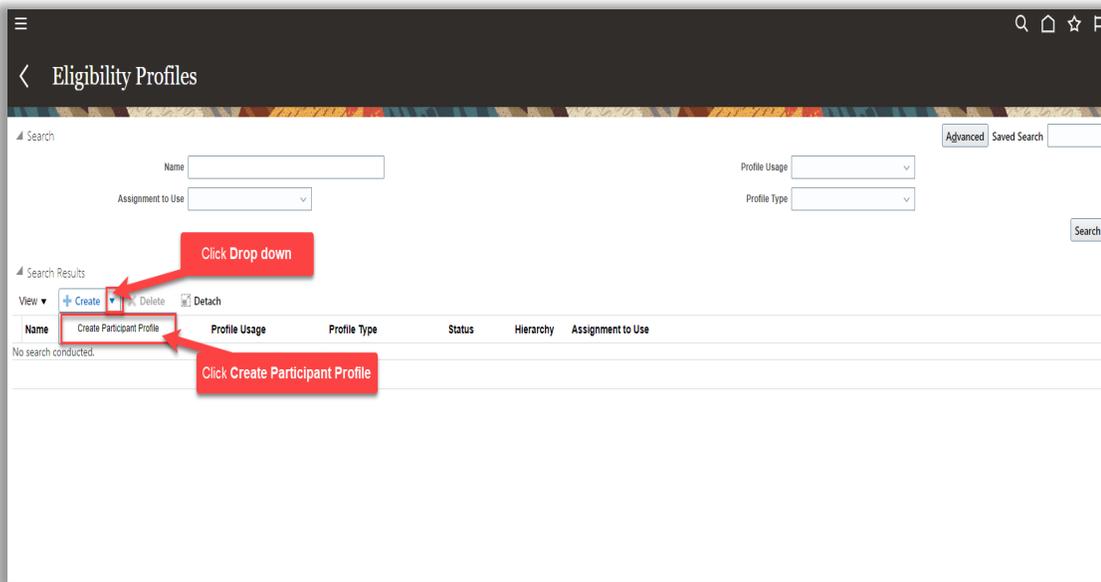
Next, click **Absences**



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



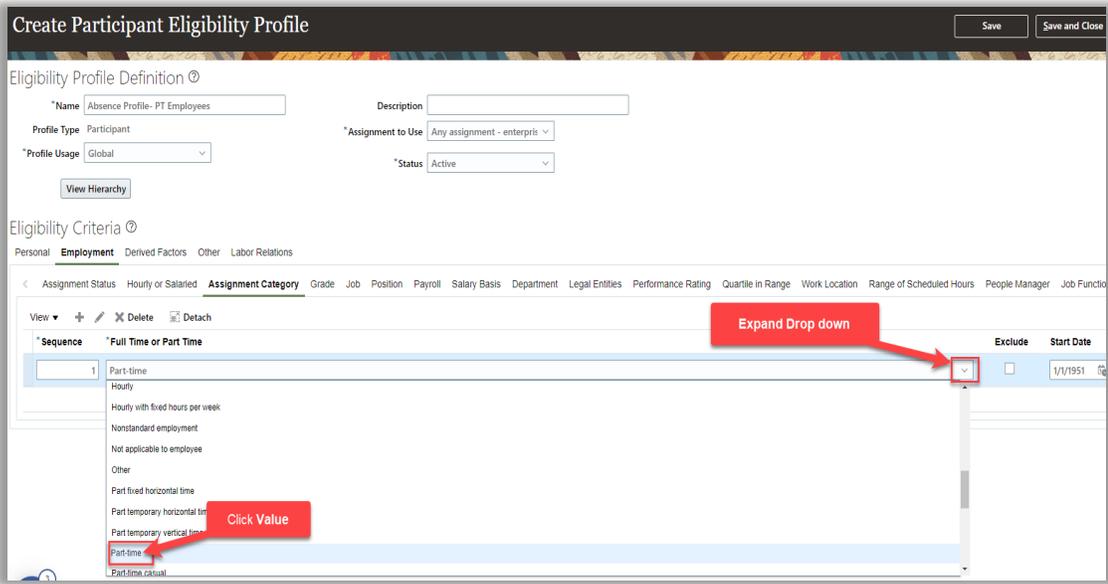
From the Eligibility Profiles Screen, we can create a new Eligibility Profile or manage existing profiles. First, we'll create an Eligibility Profile. Click **Create** then, **Create Participation Profile**



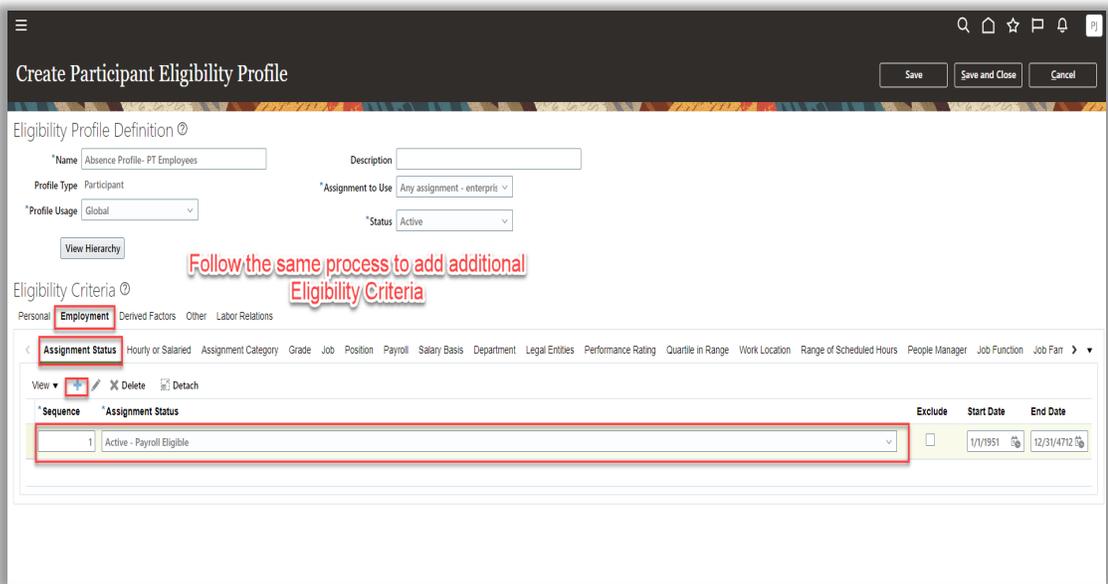
Enter the **Name**, change the profile usage to **Global**. Ensure the profile is **Active**

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

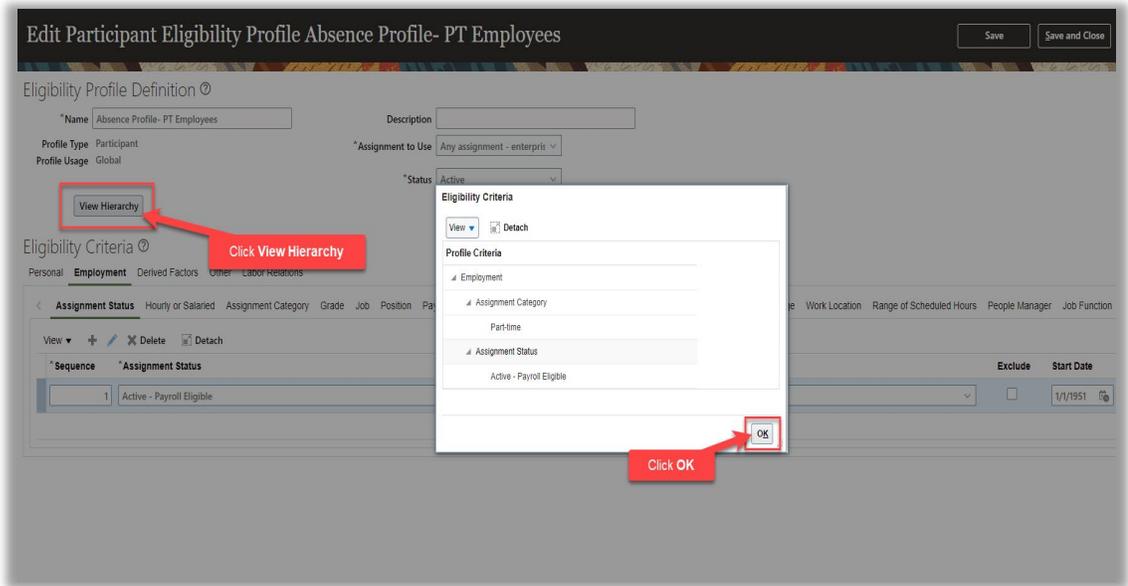
Next, from the drop down menu, select the **Value**



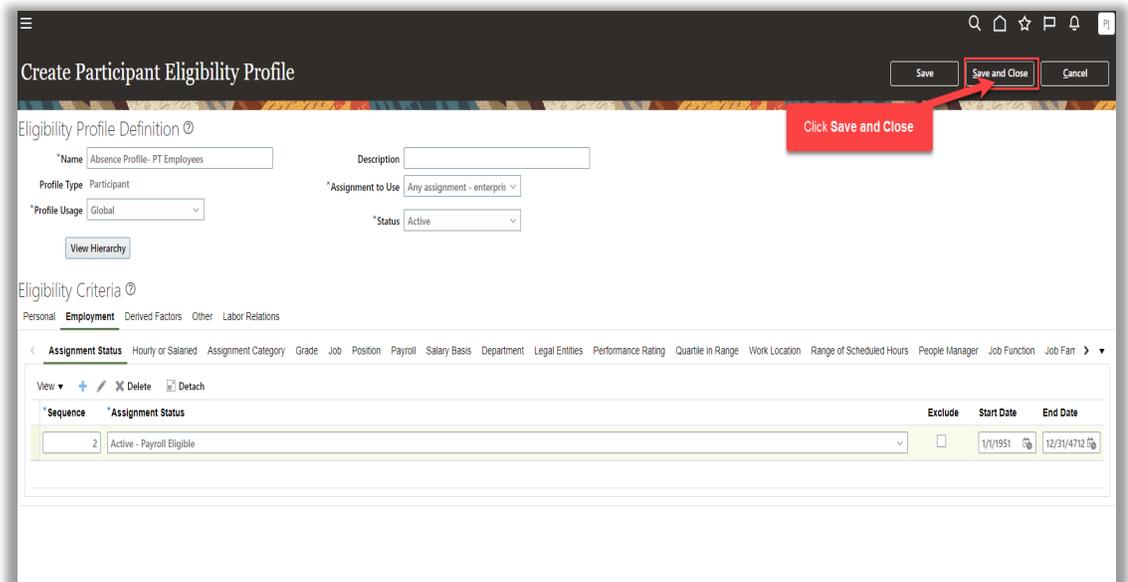
If applicable, we can add additional values to the profile but selecting additional **Eligibility Criteria**. For example, Assignment Status with a **Sequence** of 1



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



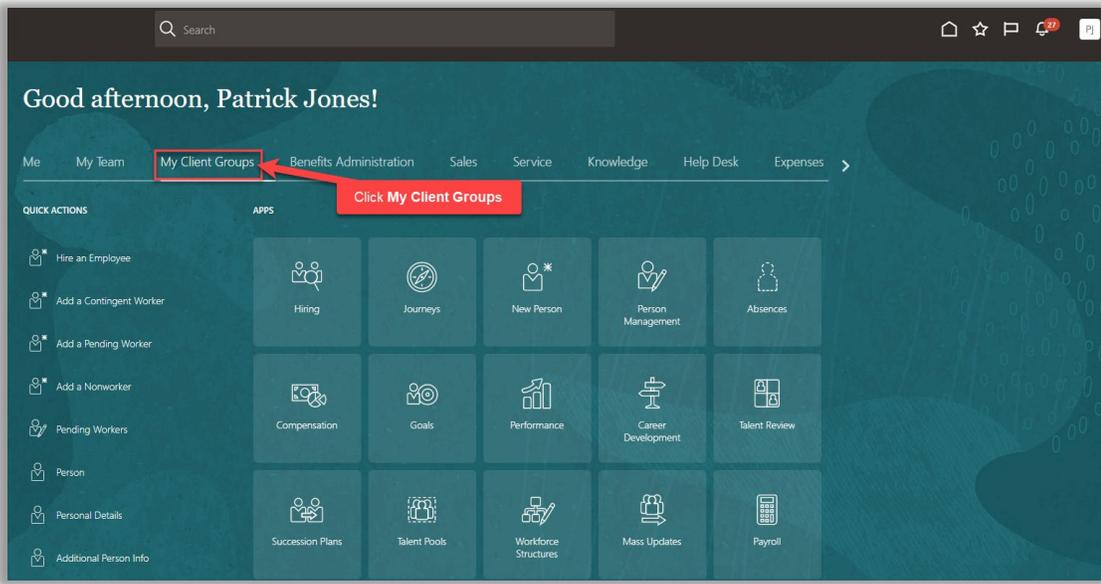
Click **Save and Close** to create the Eligibility Profile



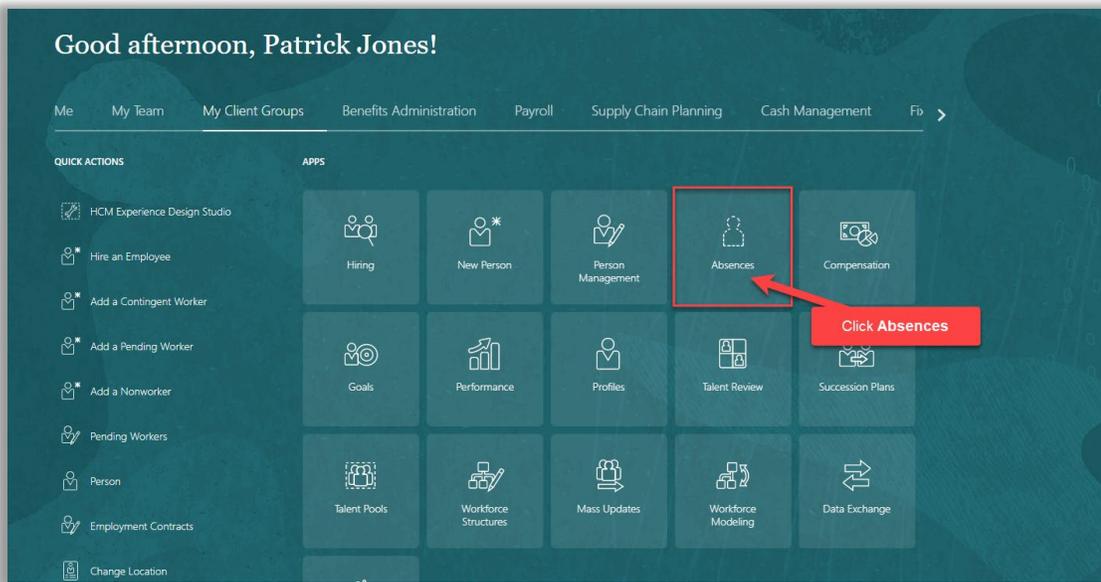
## Manage Eligibility Profiles

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

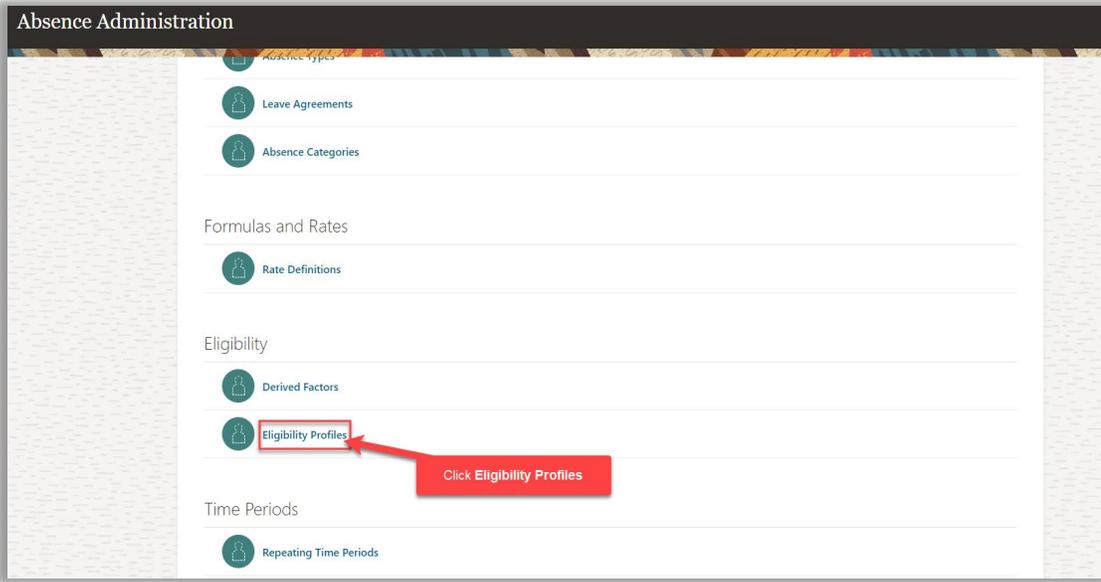
From the home screen, click **My Client Groups**



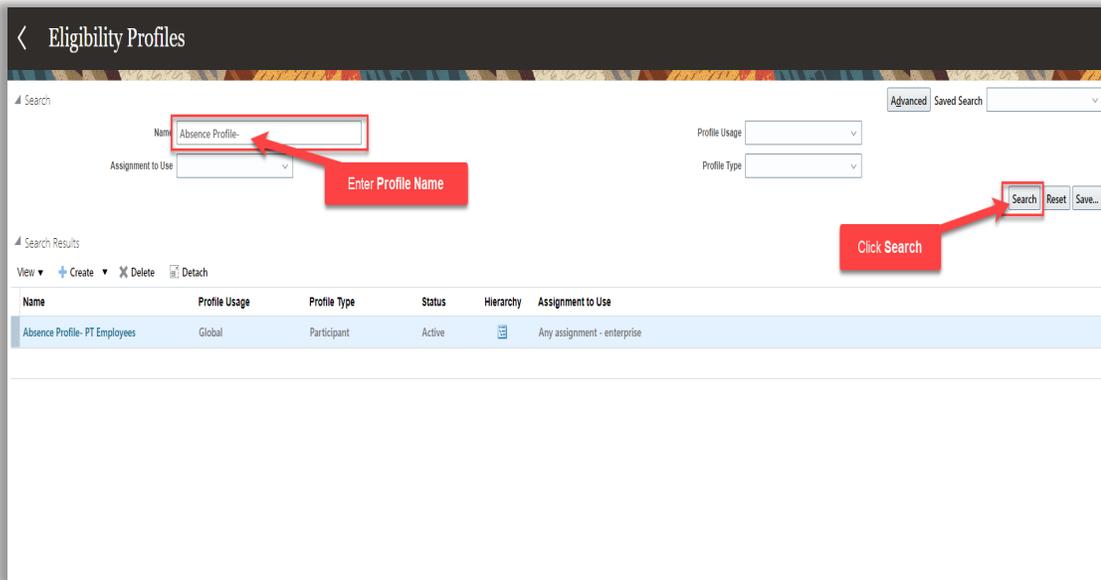
Next, click **Absences**



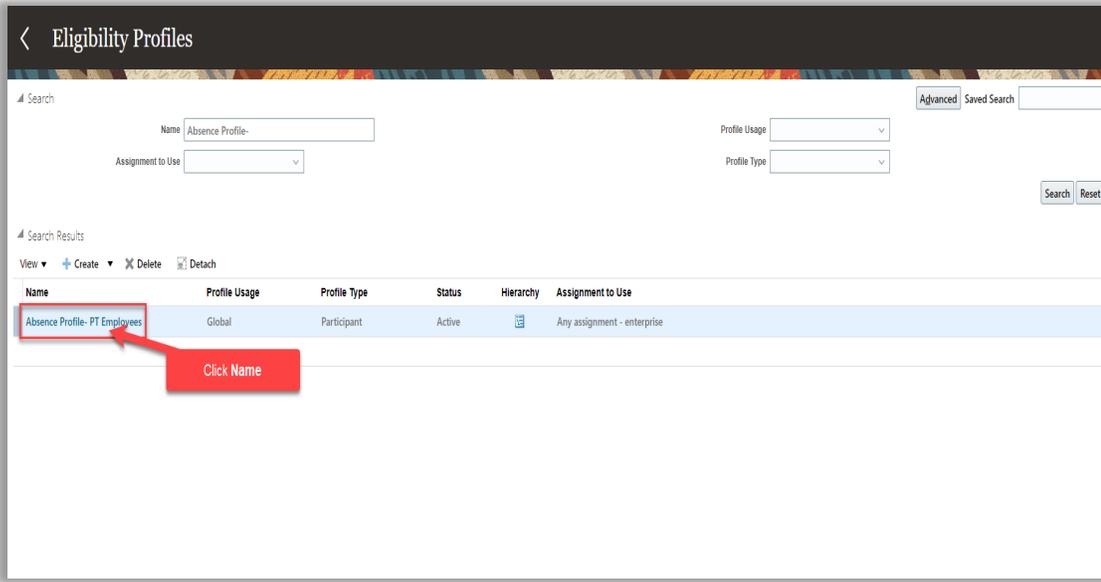
Scroll down and click **Eligibility Profiles**. If preferred, we can also search the words **Eligibility Profiles** in the Search box at the top



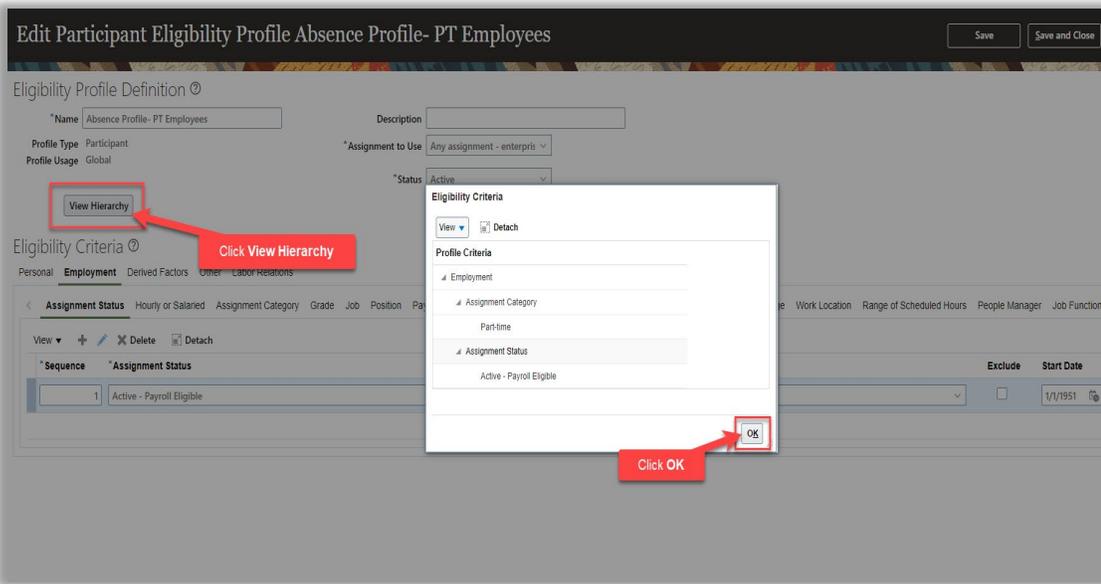
From the Eligibility Profiles Screen, we can create a new Eligibility Profile or manage existing profiles. We'll manage an **Eligibility Profile** by entering the **Name** and click **Search**



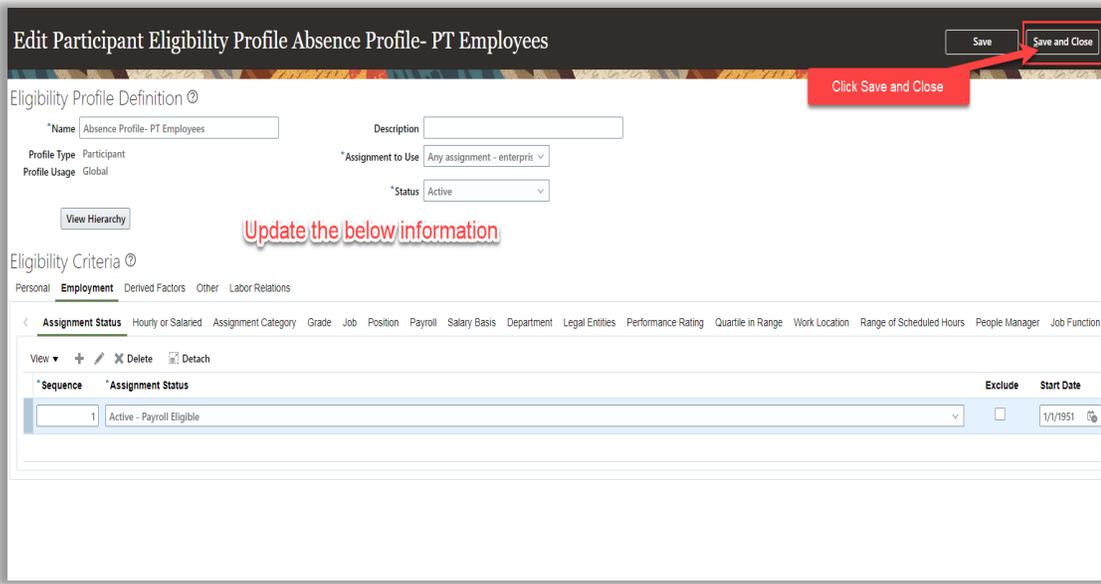
Click Eligibility Profile Name



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



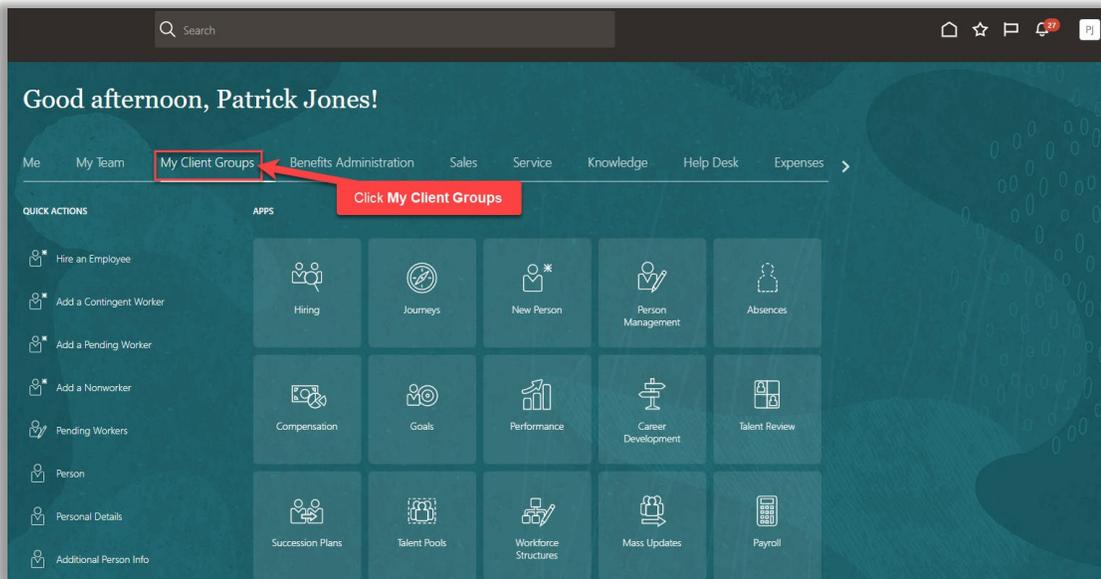
Click **Save and Close**



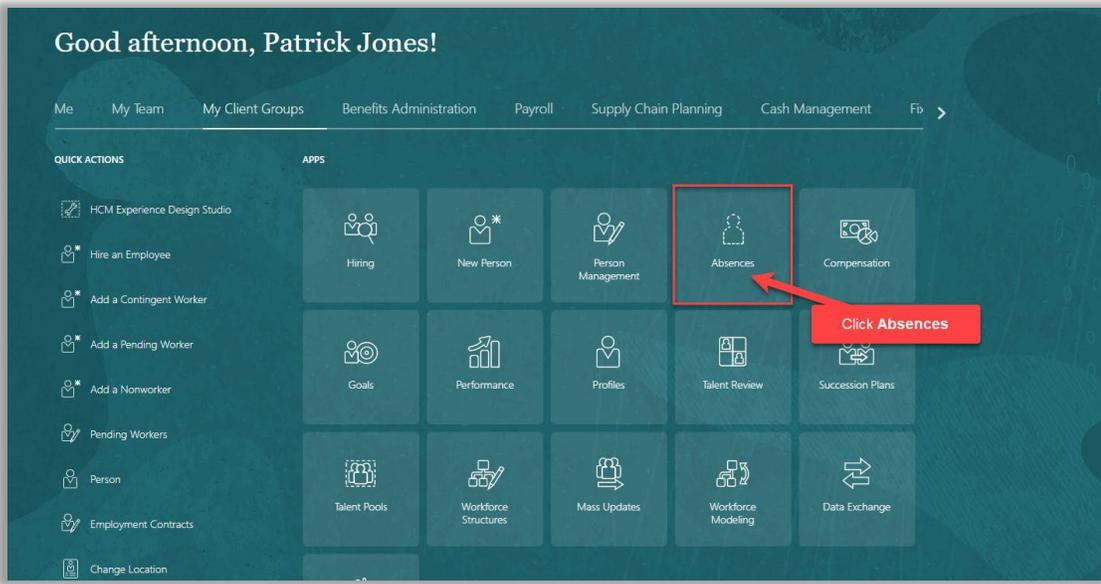
## Manage Derived Factors

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

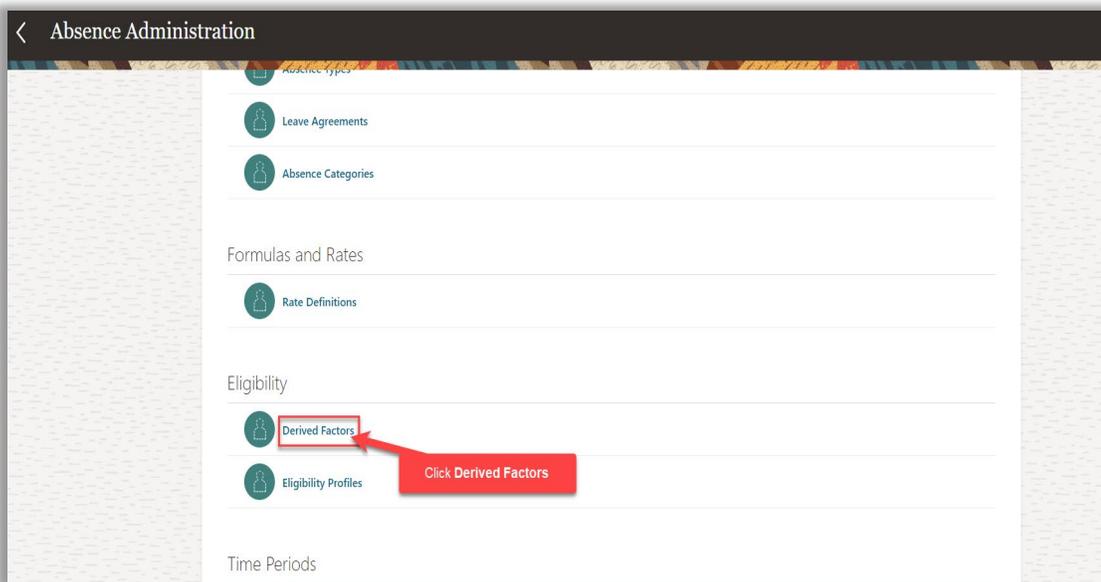
From the home screen, click **My Client Groups**



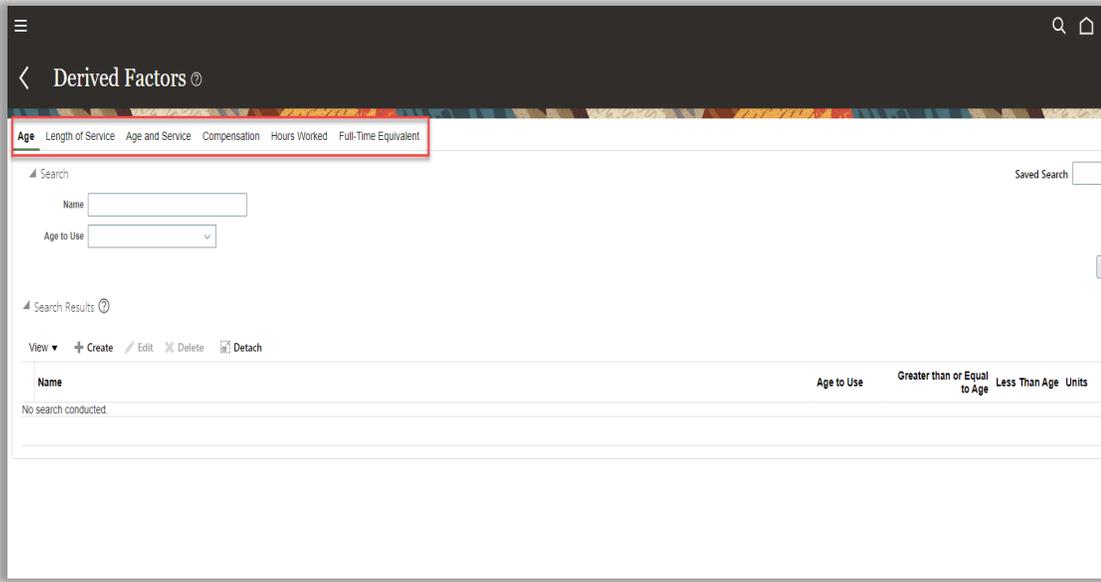
Next, click **Absences**



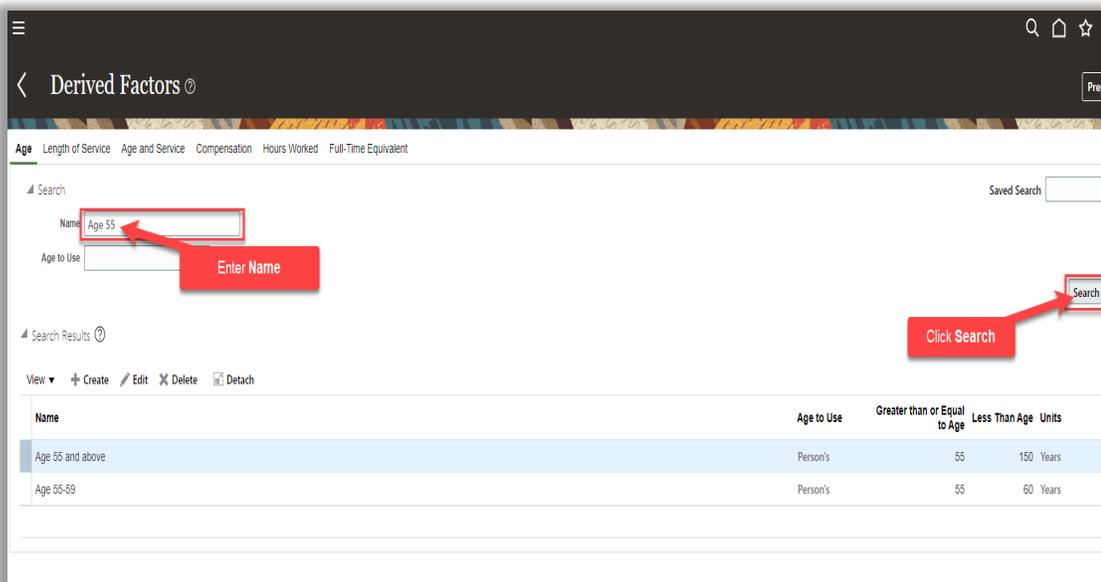
Scroll down and click **Derived Factors**. If preferred, we can also search the words **Derived Factors** in the Search box at the top



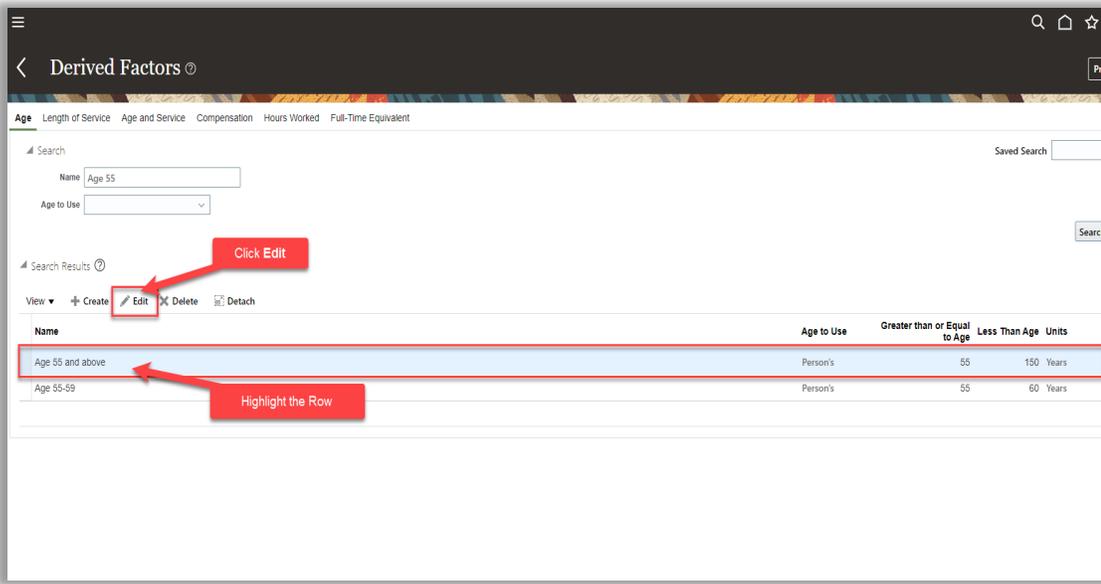
**Derived Factors** includes age, compensation, length of service, hours worked, full-time equivalent, and a combination of age and length of service. These are the derived factor components that can be added to the **Eligibility Profile**



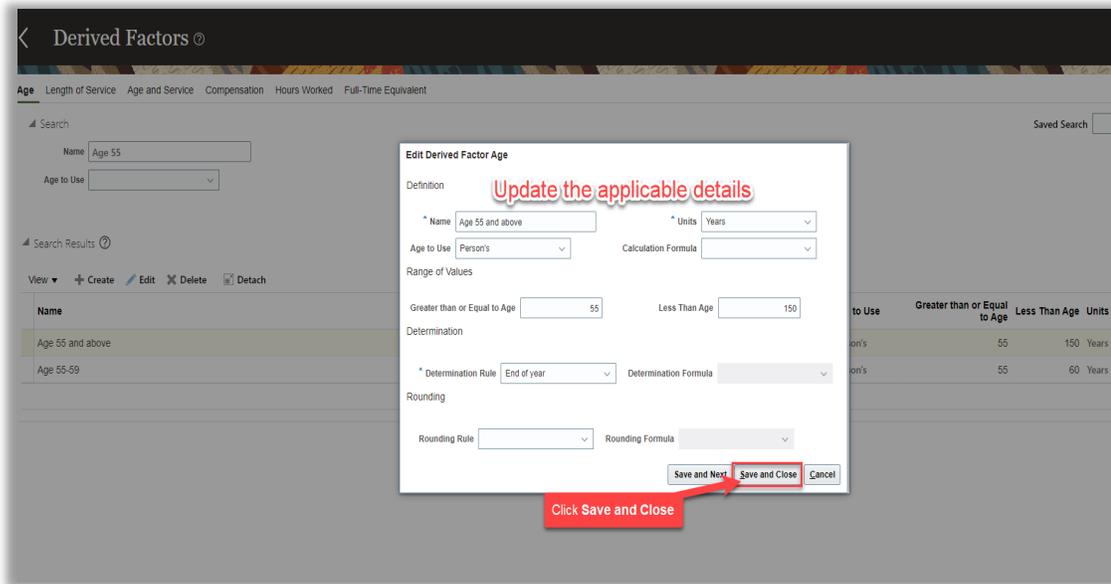
We can create a new Derived Factor or manage existing **Derived Factors**. We'll manage a Derived Factor by entering the **Name** and click **Search**



Highlight the row and click **Edit**



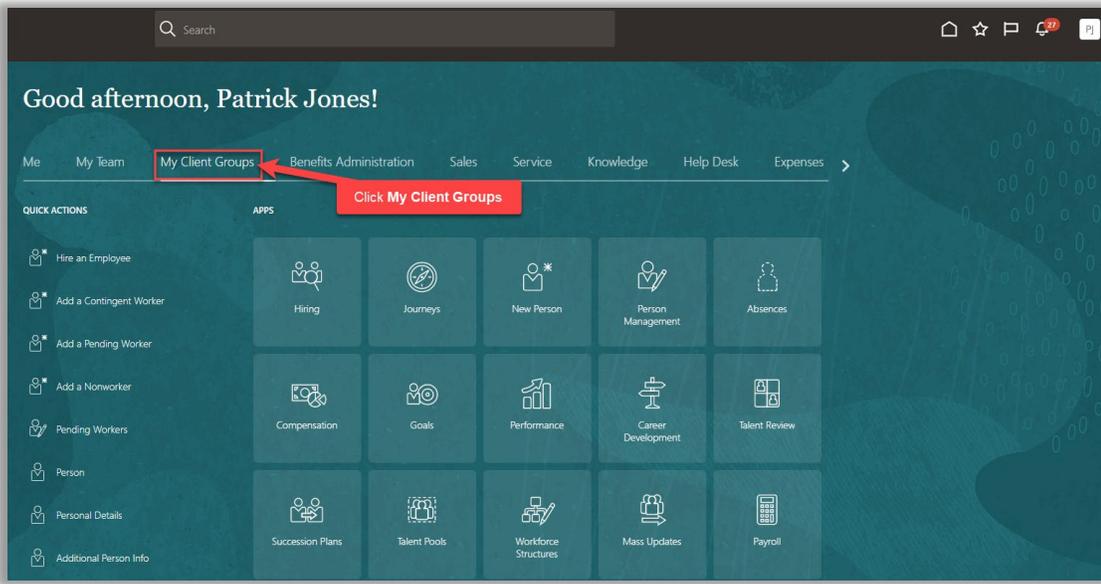
Update the applicable details and click **Save and Close**



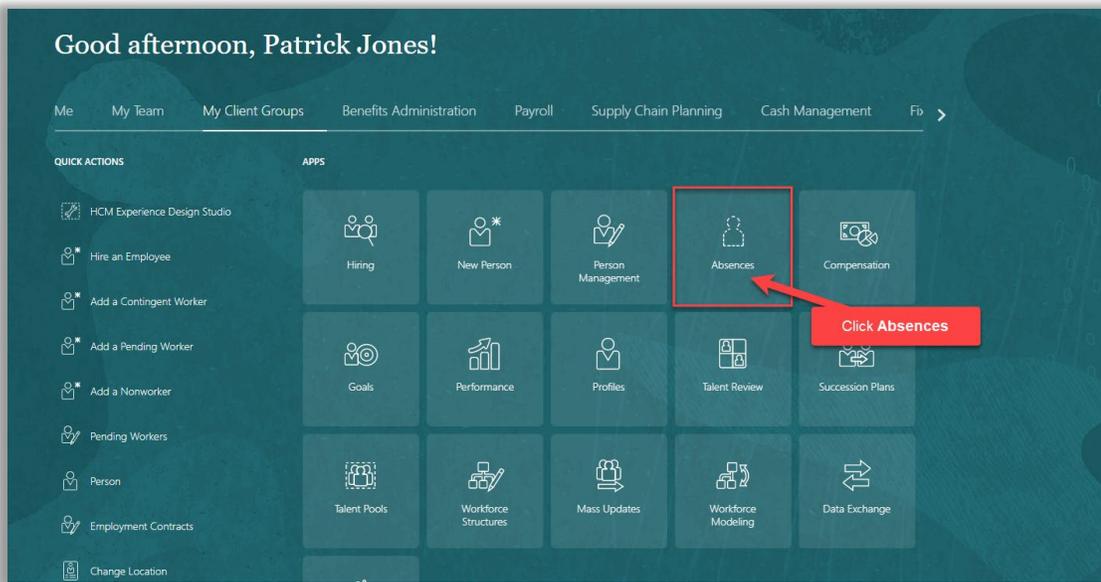
### Add Absence Reasons

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

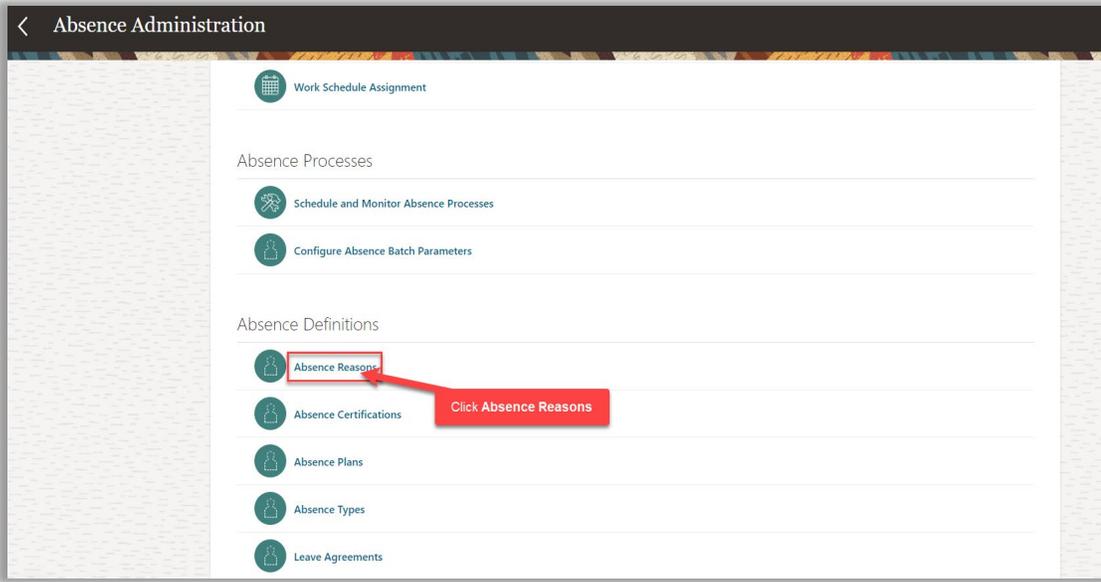
From the home screen, click **My Client Groups**



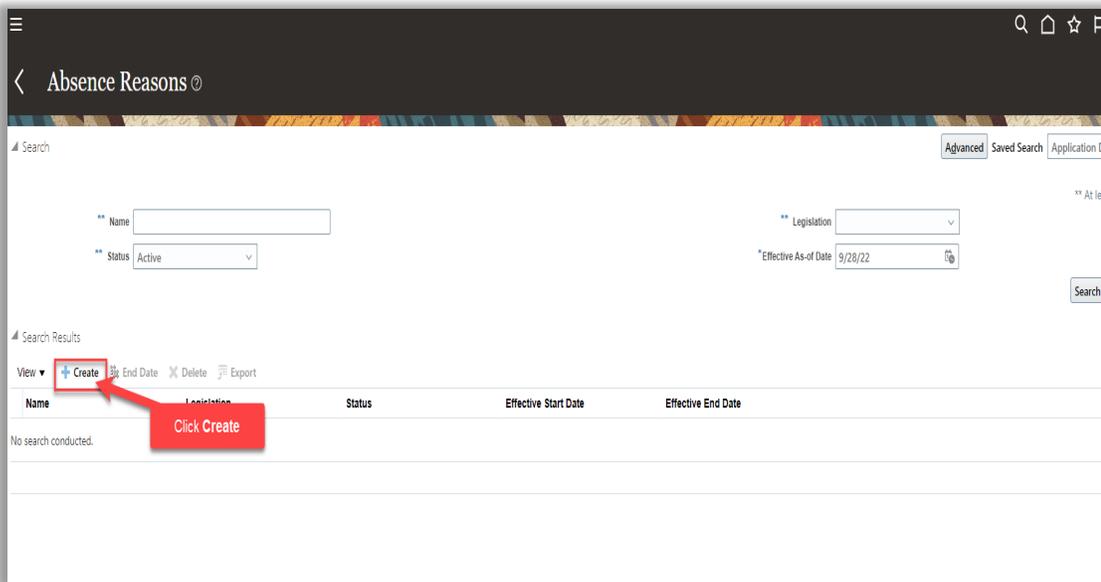
Next, click **Absences**



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 **Enter Effective Date**

**Basic Details**

Effective Start Date: 1/1/51

\*Name: Dependent Illness **Enter Name**

Description: [Text Area]

Effective End Date: [Text Field]

\*Legislation: United States **Select Legislation**

\*Status: Active

Management: User-defined

**Legislative Information**

Context Segment: [Dropdown]

**Descriptive Information**

Context Segment: [Dropdown]

**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: [Text Area]

Effective End Date: [Text Field]

\*Legislation: United States

\*Status: Active

Management: User-defined

**Legislative Information**

Context Segment: [Dropdown]

**Descriptive Information**

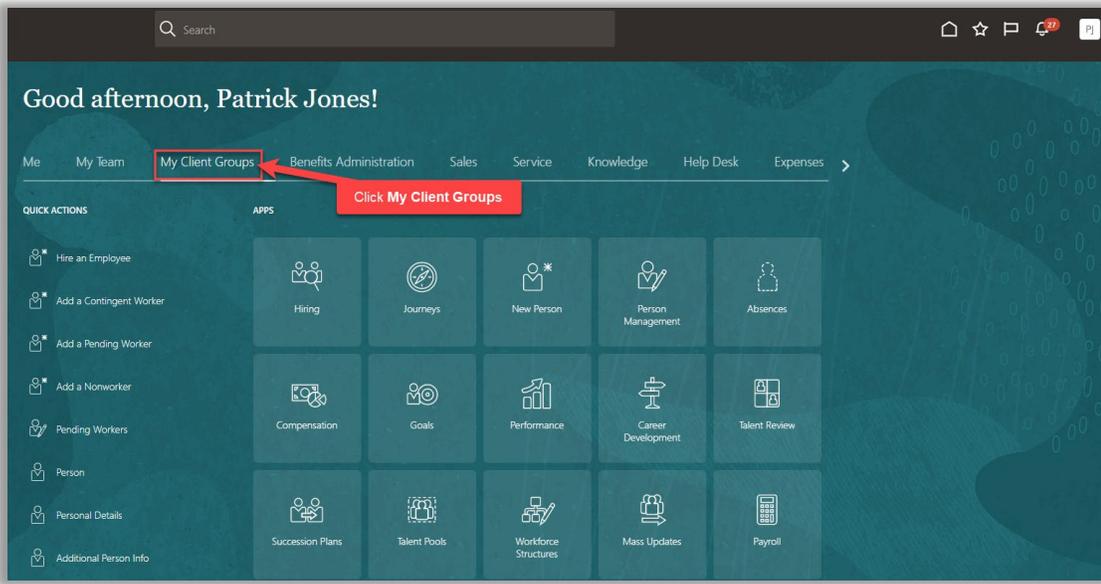
Context Segment: [Dropdown]

**Click Save and Close**

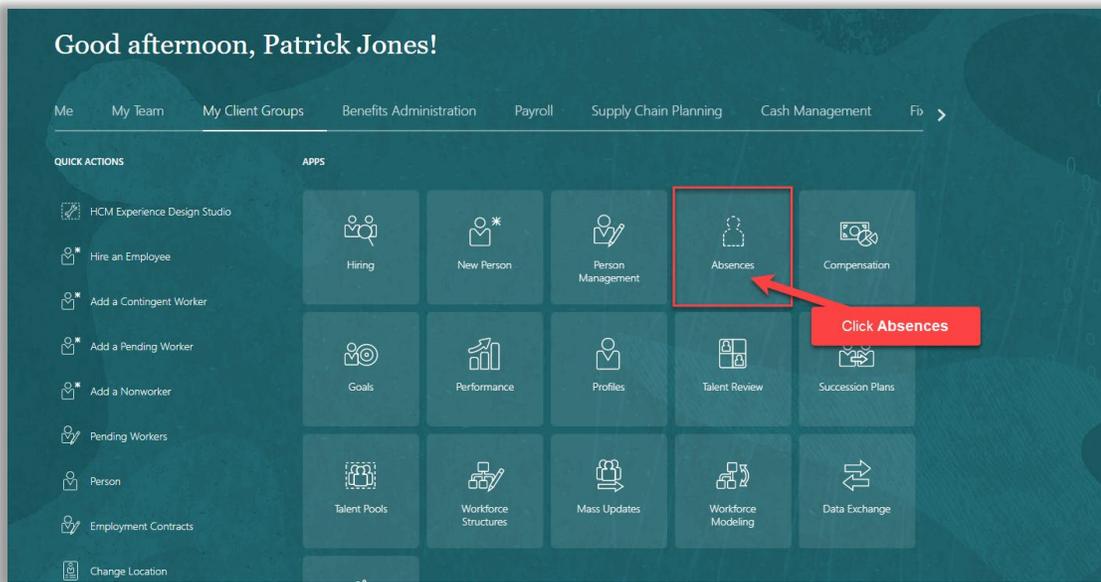
### Add Absence Reasons To An Absence Type

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

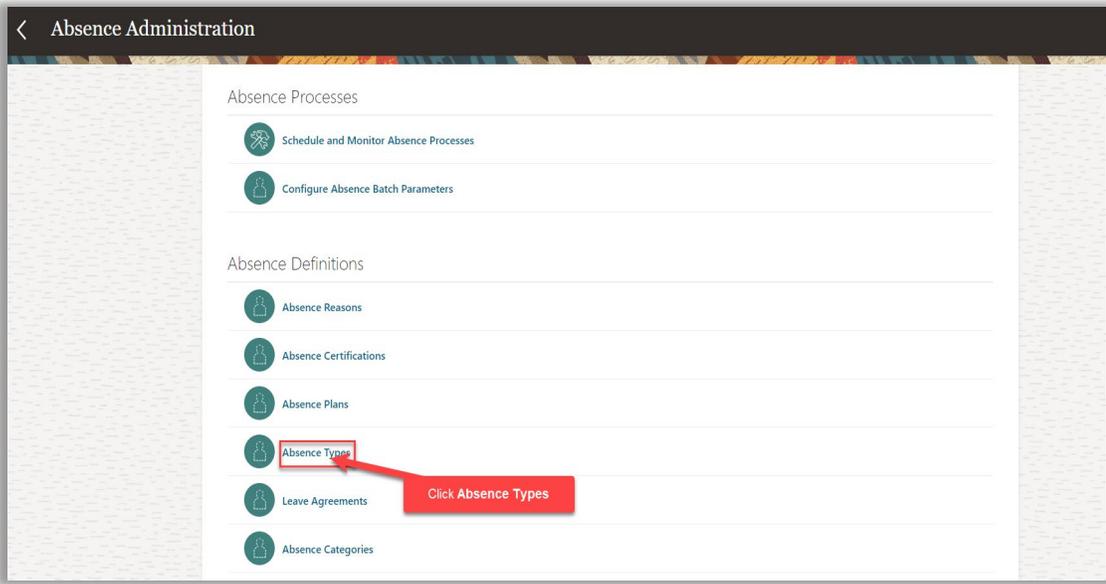
From the home screen, click **My Client Groups**



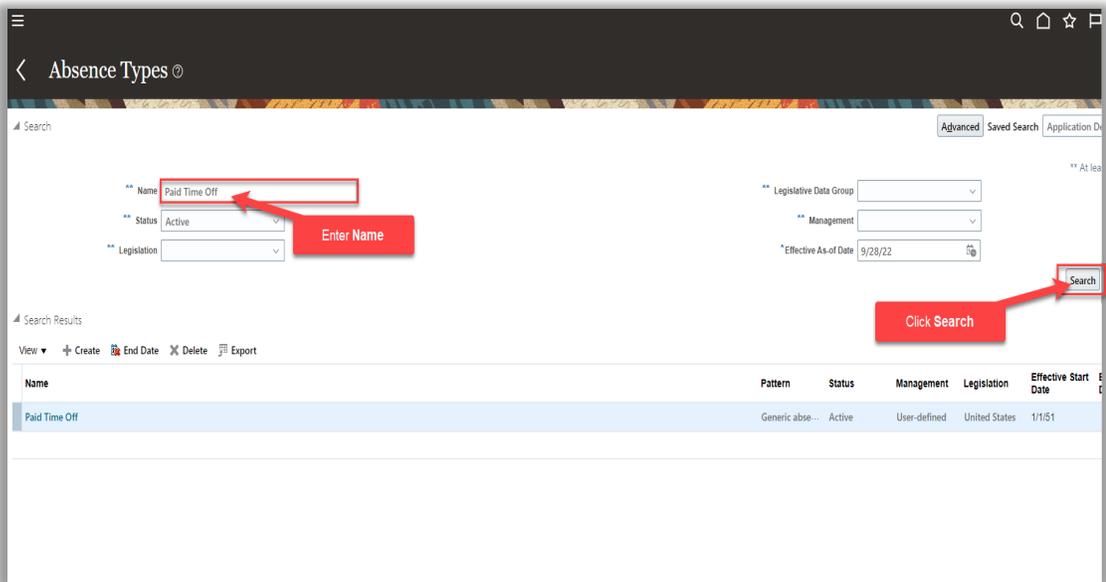
Next, click **Absences**



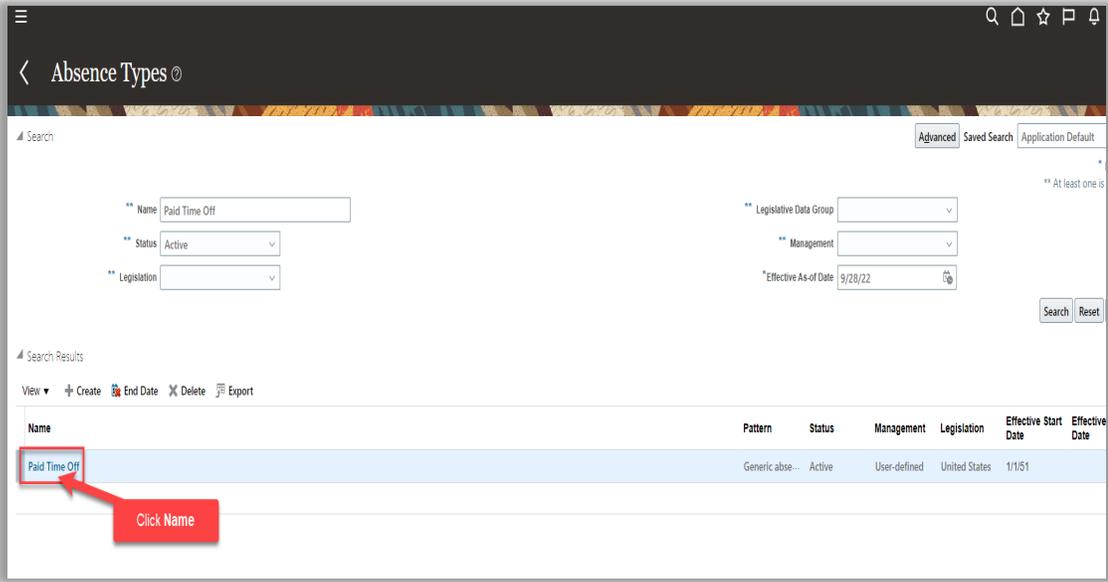
Scroll down and click **Absence Types**. If preferred, we can also search the words **Absence Types** in the Search box at the top



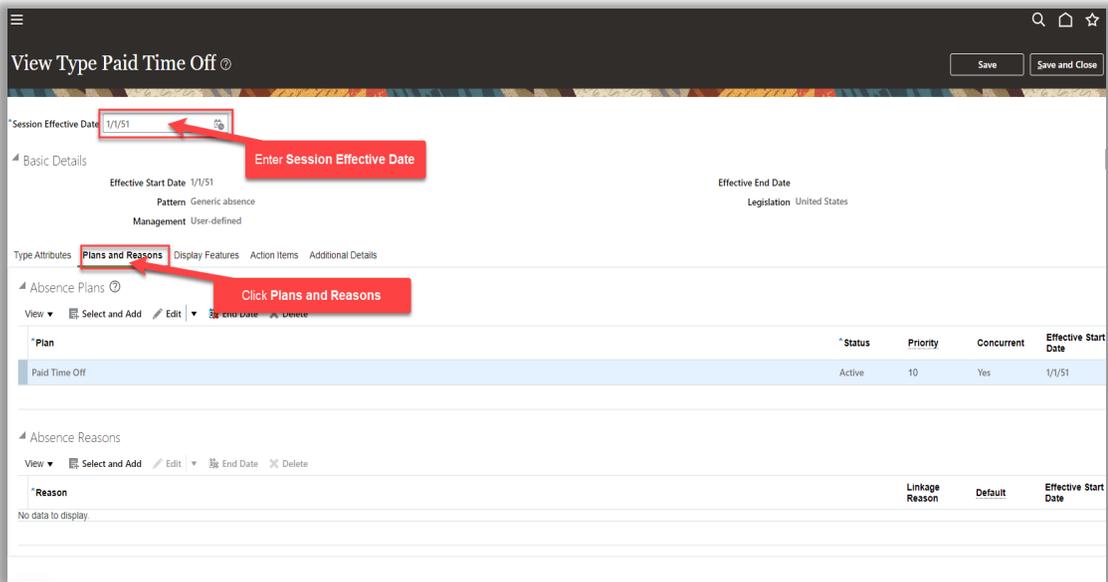
Enter the Absence Type Name and click Search



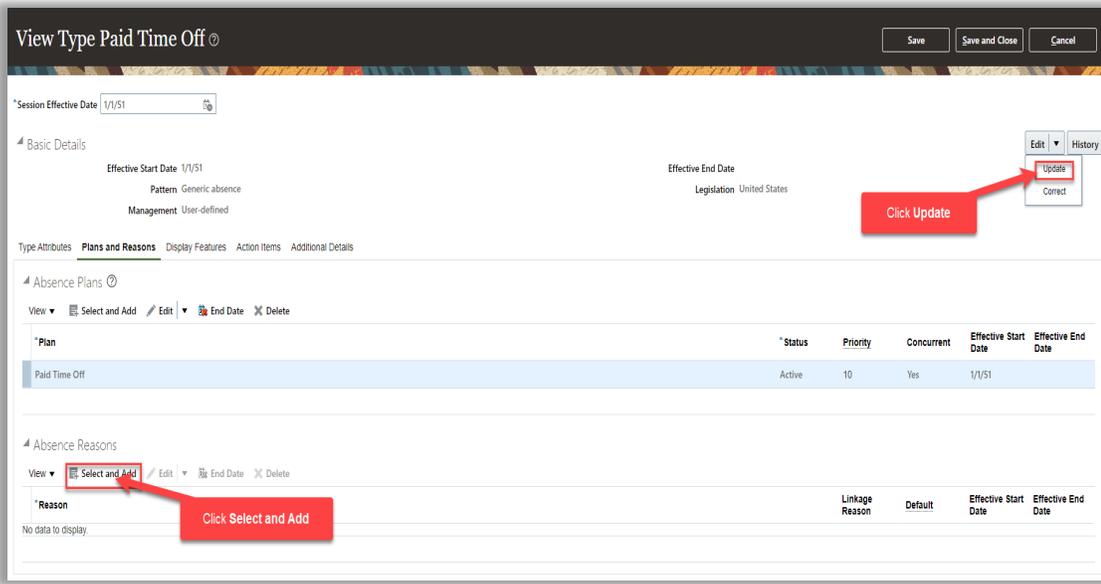
Click the Absence Type Name



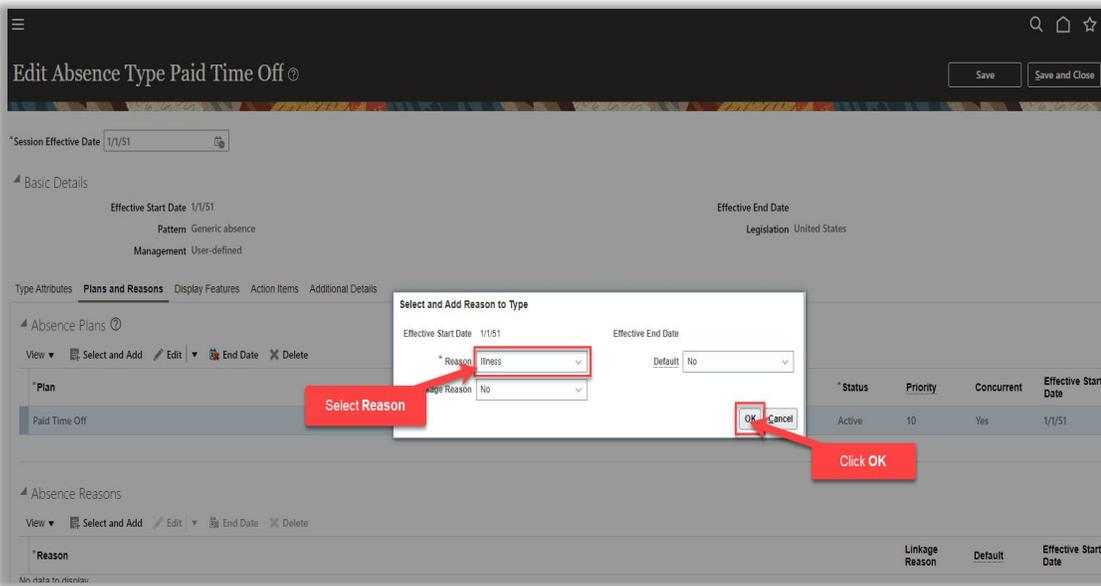
Enter the **Session Effective Date**; this is the effective date of the addition of the Reason to the Type. Click **Plans and Reasons**



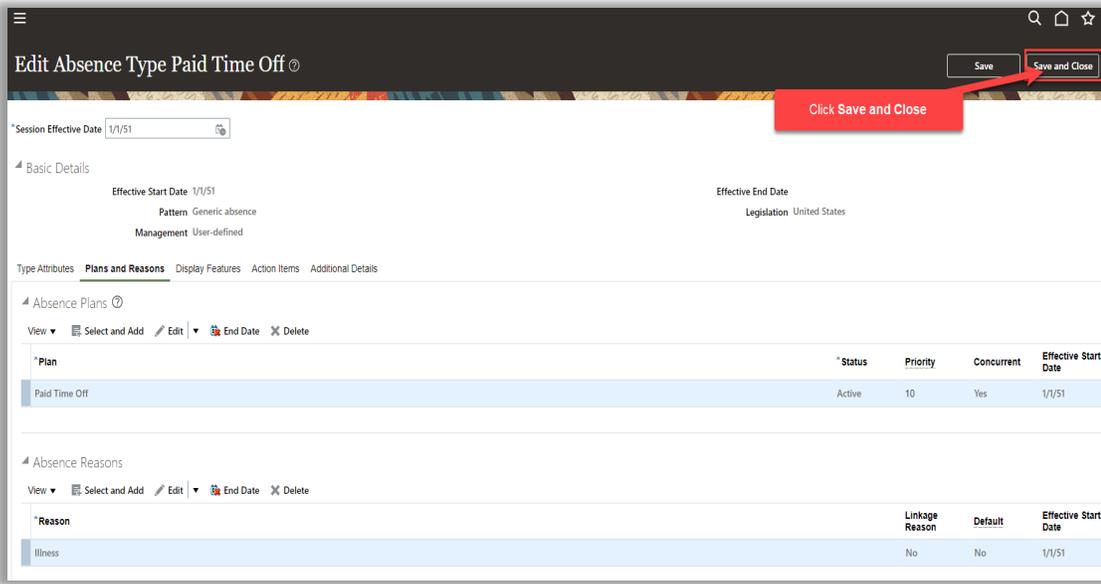
Click **Edit** then **Update**. Next, under **Absence Reasons**, click **Select and Add**



Select the Reason from the drop down and click OK

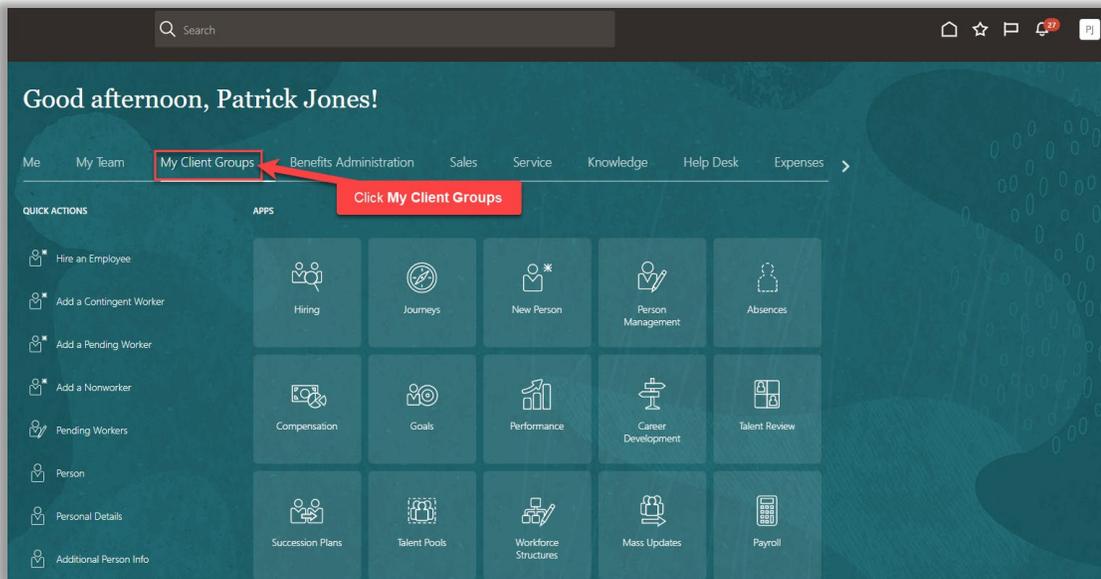


Click Save and Close

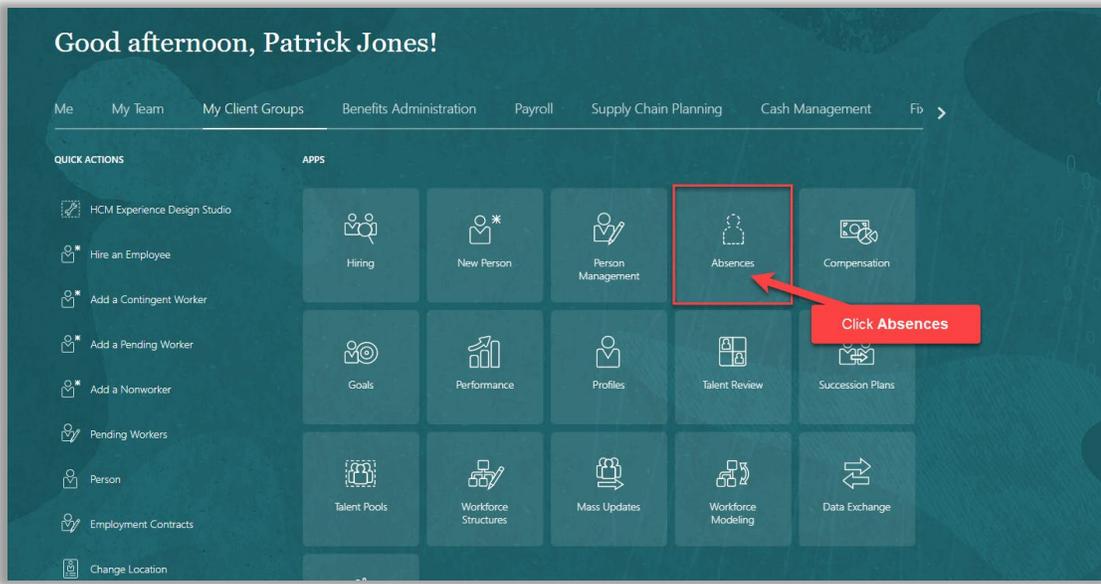


**Remove Absence Reasons From An Absence Type**  
 Navigation: Home>My Client Groups>Absences>Absence Type>Search>Edit>Save and Close

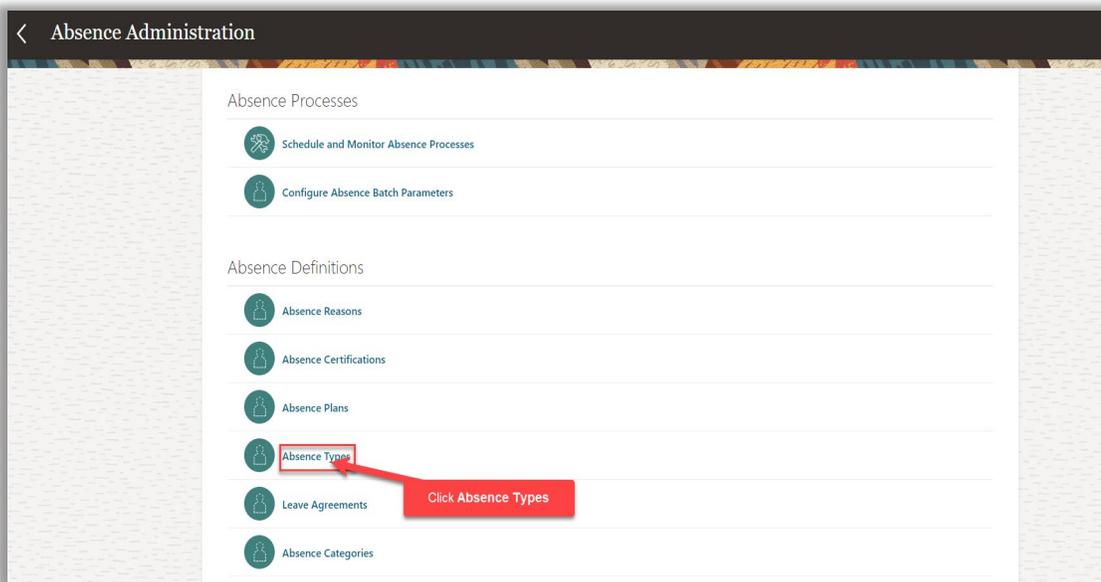
From the home screen, click **My Client Groups**



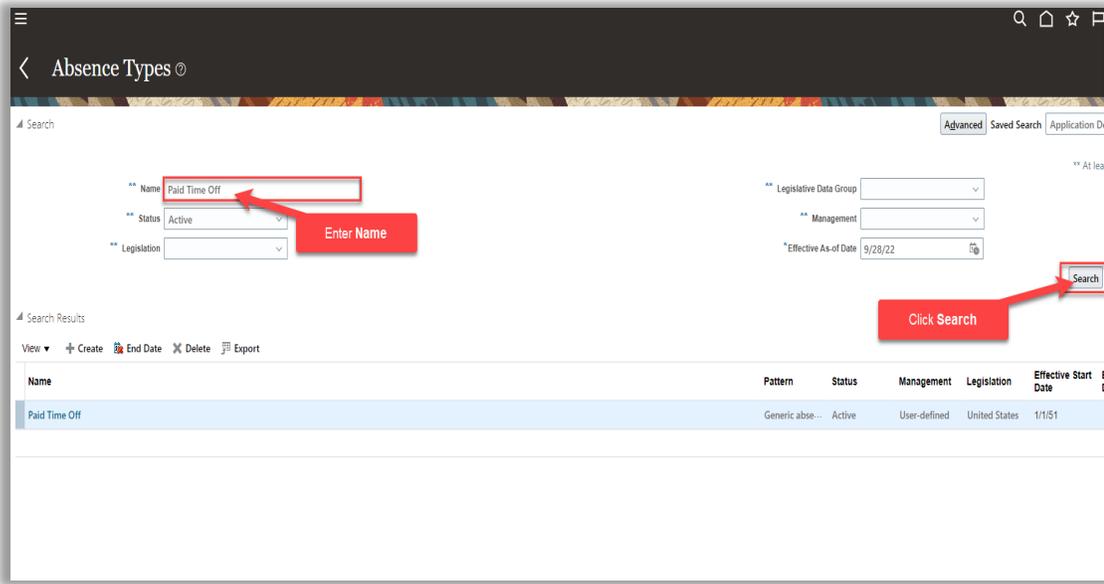
Next, click **Absences**



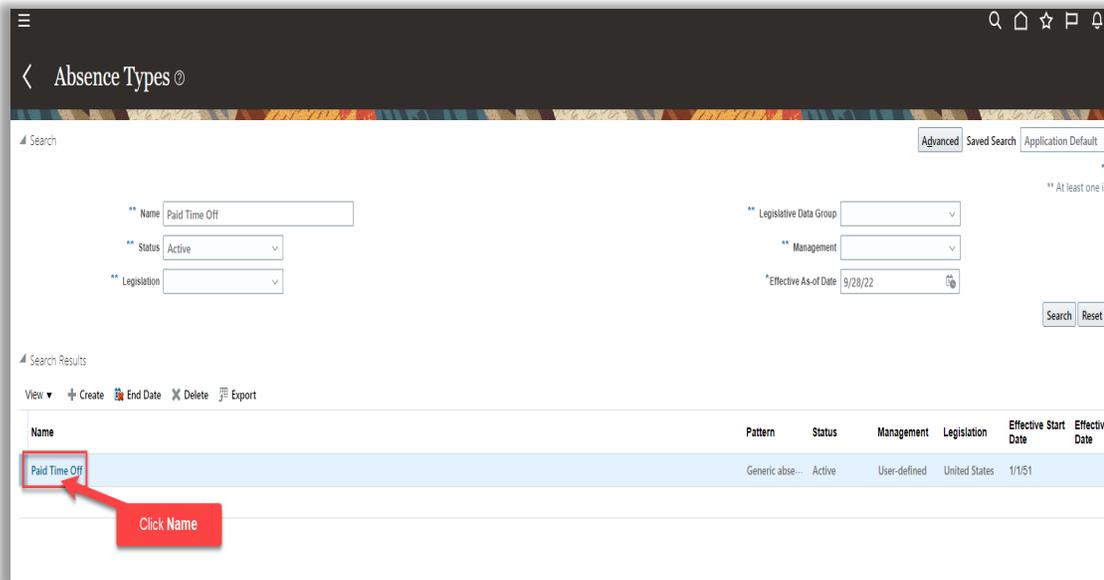
Scroll down and click **Absence Types**. If preferred, we can also search the words **Absence Types** in the Search box at the top



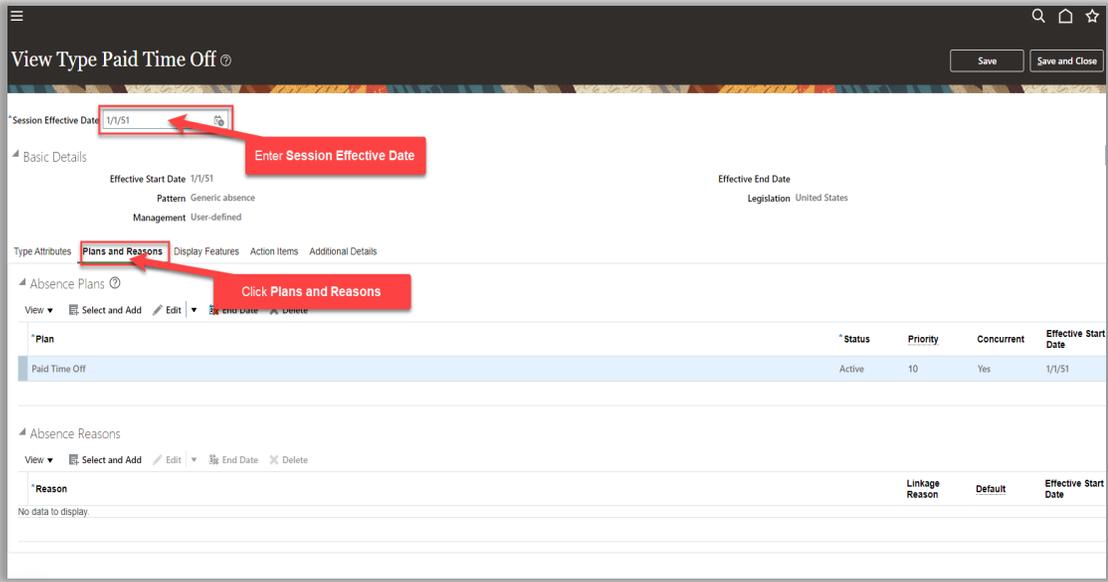
Enter the Absence Type Name and click **Search**



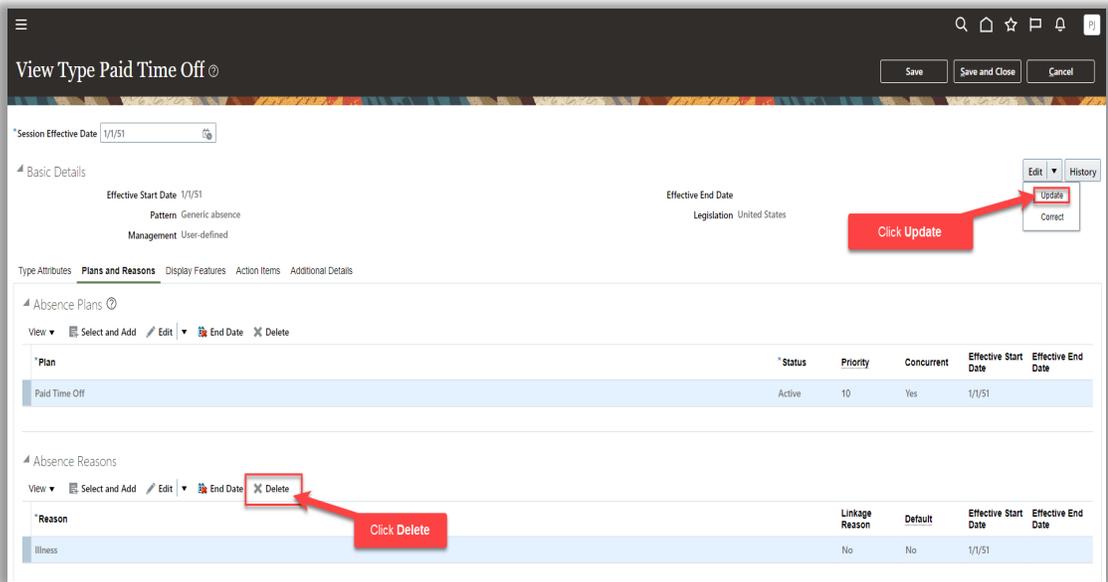
Click the Absence Type Name



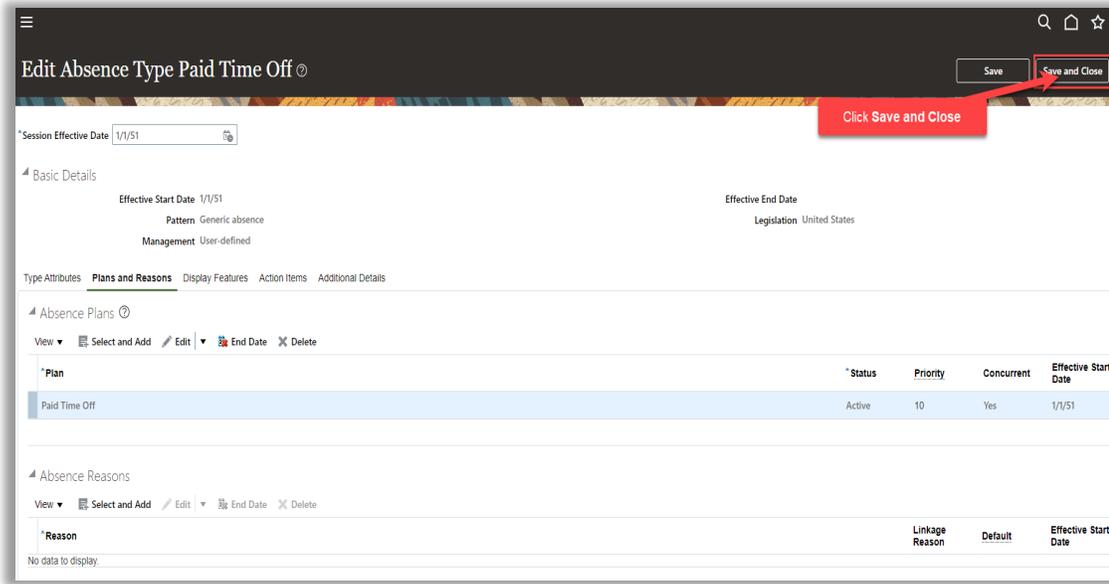
Enter the **Session Effective Date**; this is the effective date of the removal of the Reason to the Type. Click **Plans and Reasons**



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



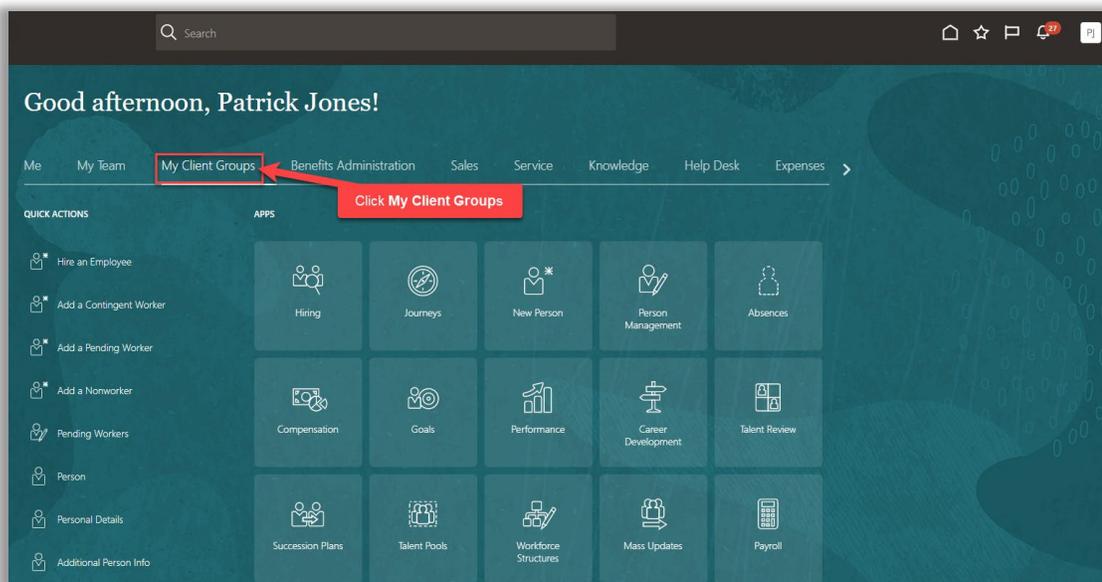
Click **Save and Close**



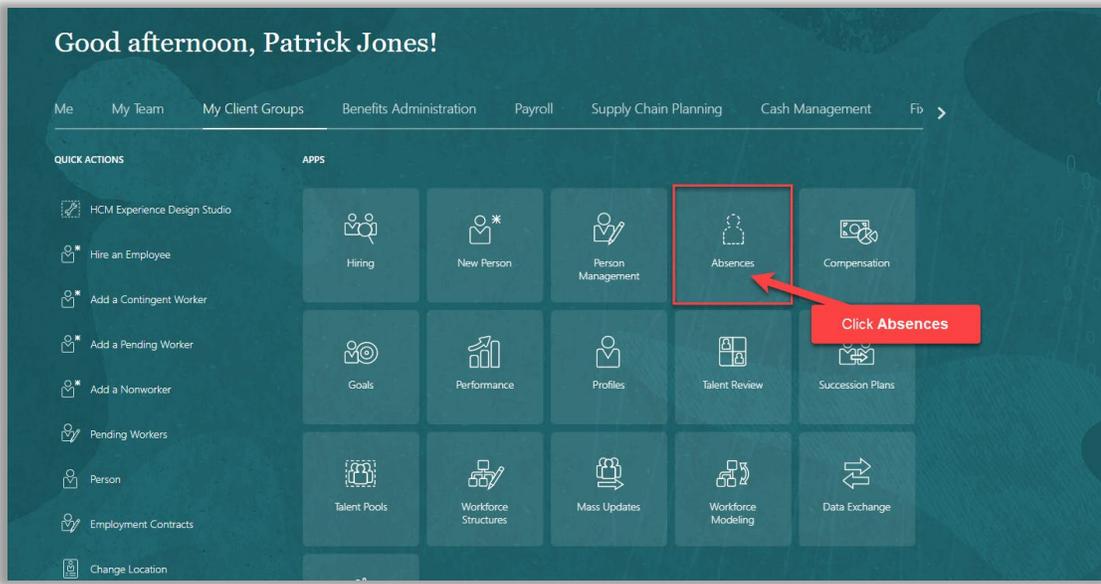
## Manage Absence Reasons

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

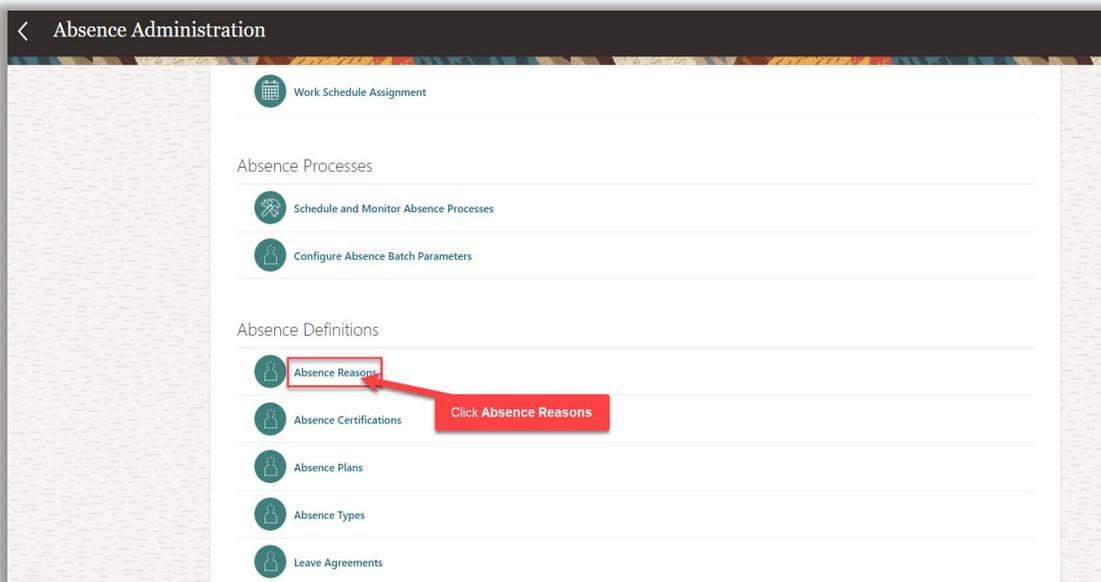
From the home screen, click **My Client Groups**



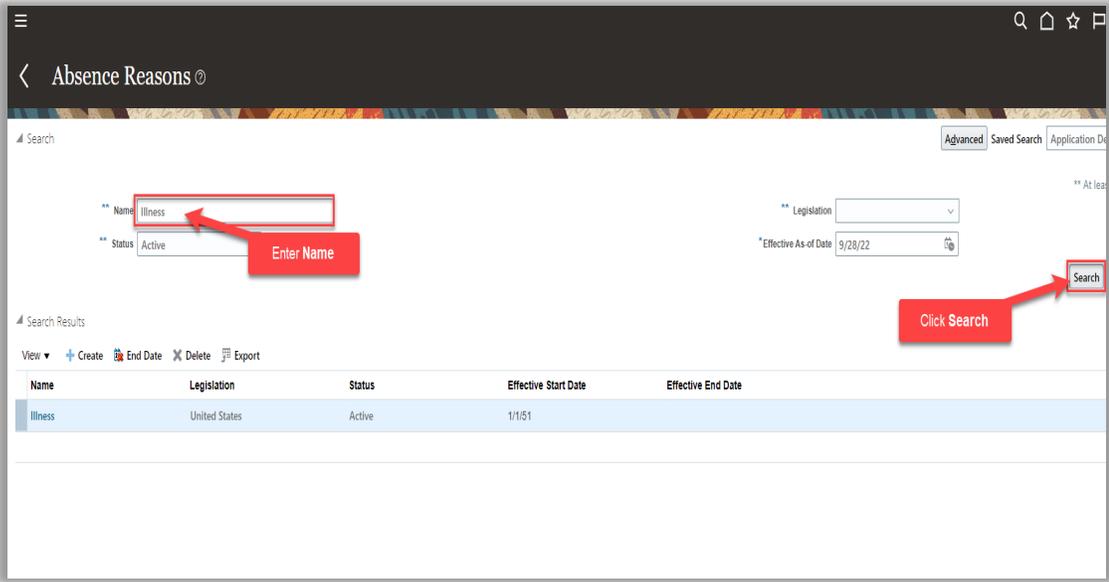
Next, click **Absences**



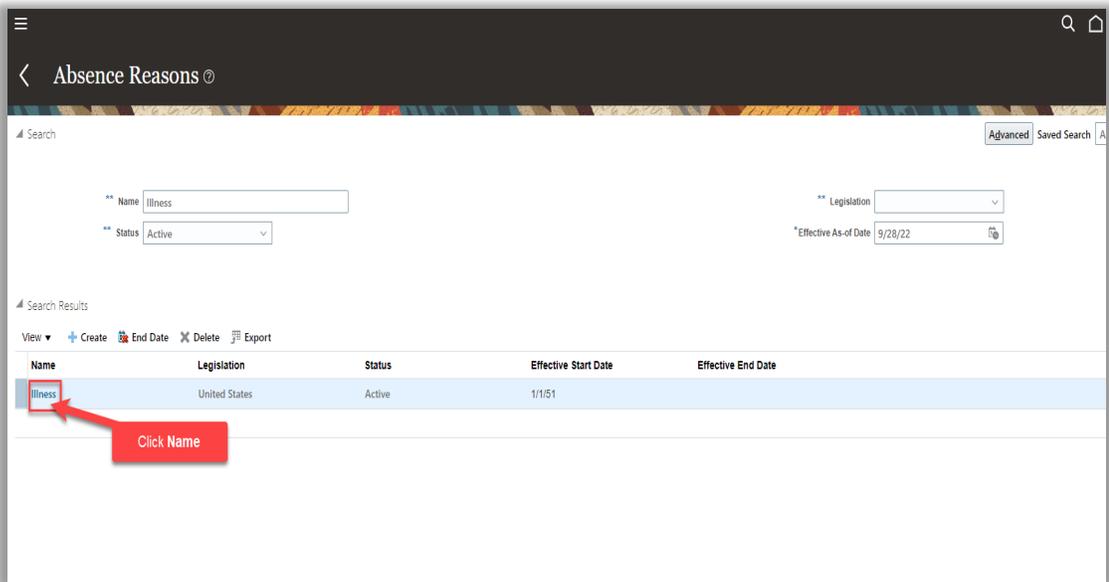
Scroll down and click **Absence Reasons**. If preferred, we can also search the words **Absence Reasons** in the Search box at the top



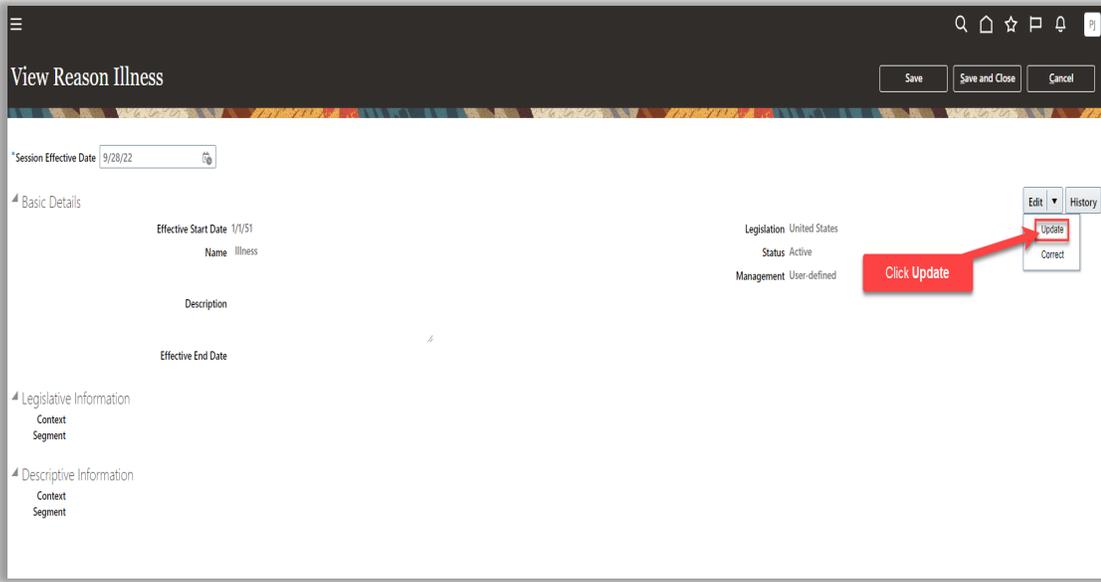
Enter the Absence Reason **Name** and click **Search**



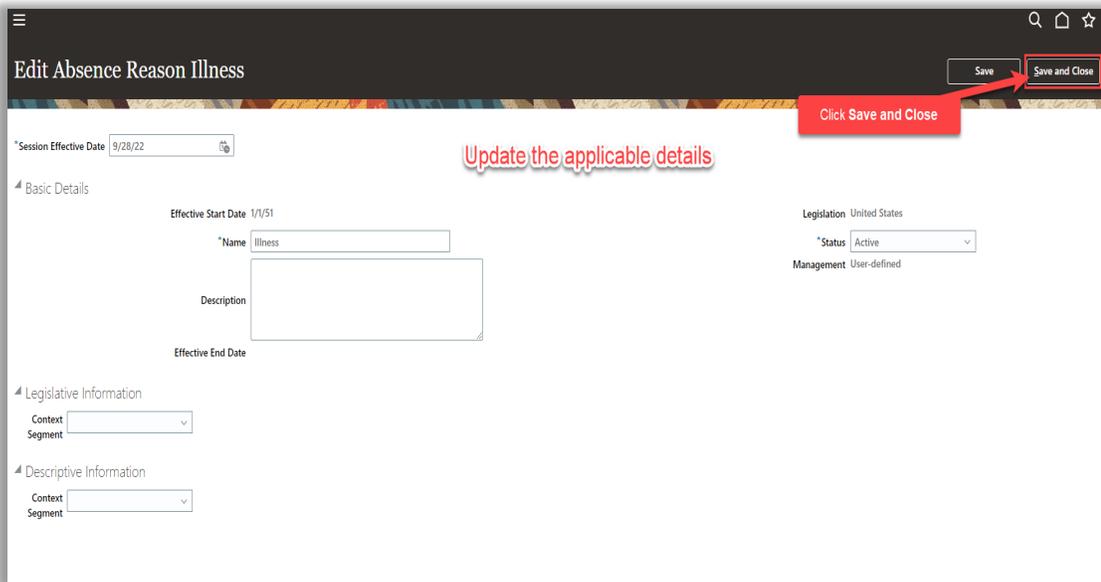
Click the Absence Reason Name



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



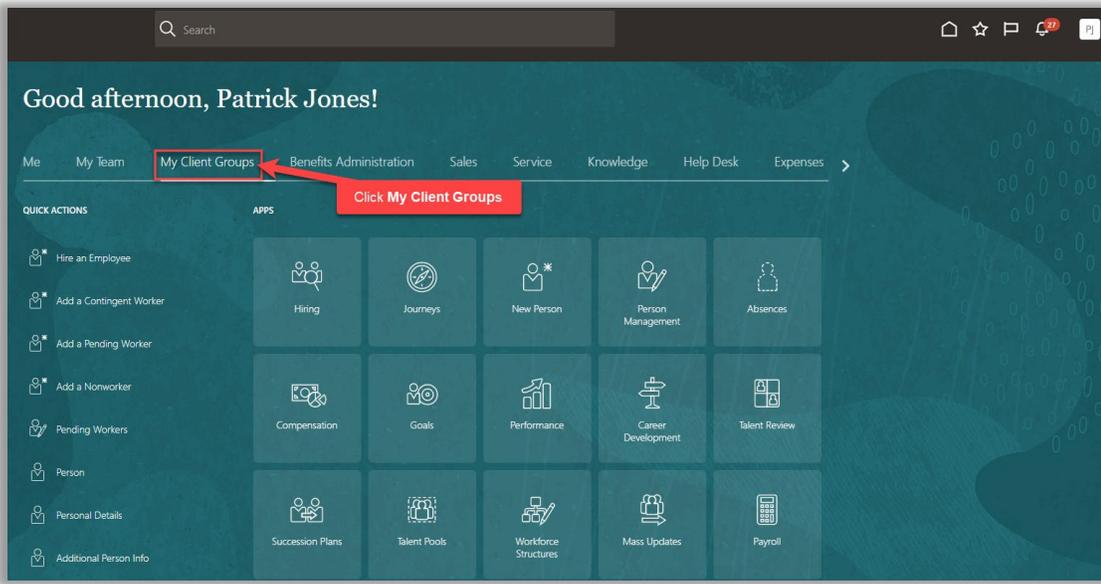
Update the applicable details and click **Save and Close**



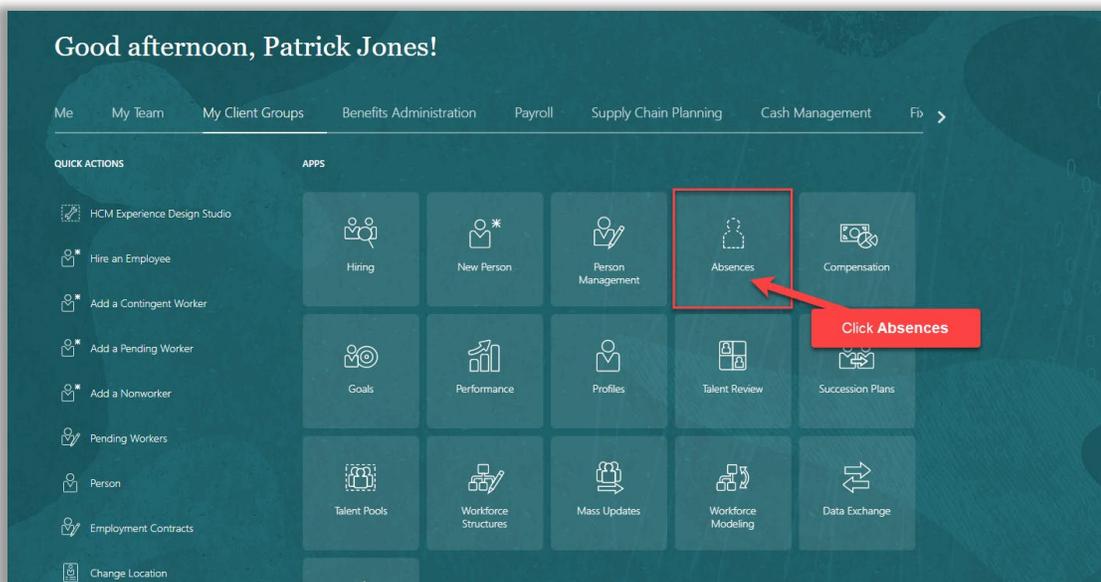
## Manage Absence Plans

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

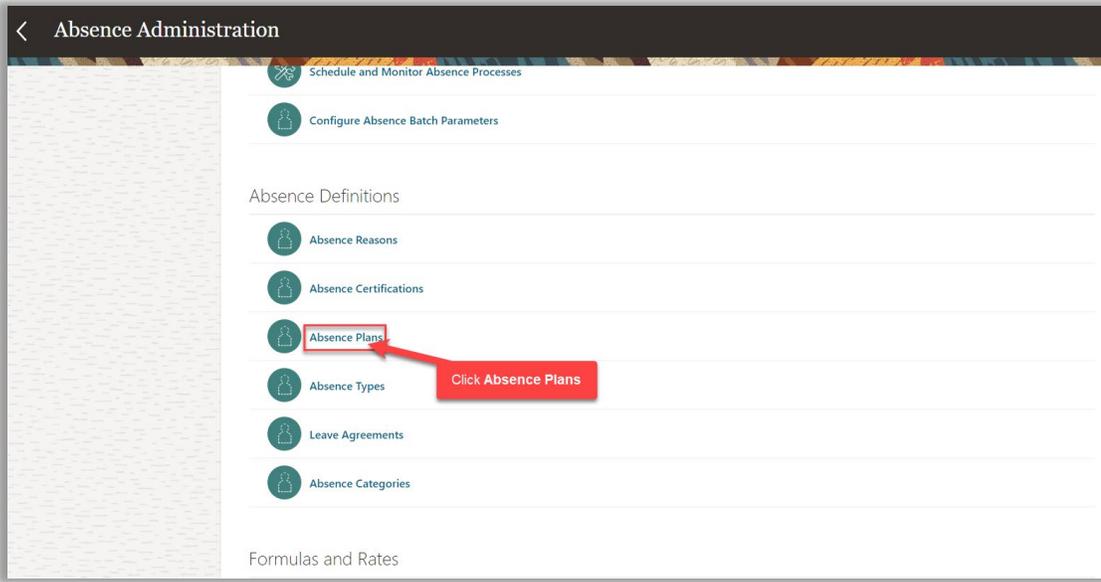
From the home screen, click **My Client Groups**



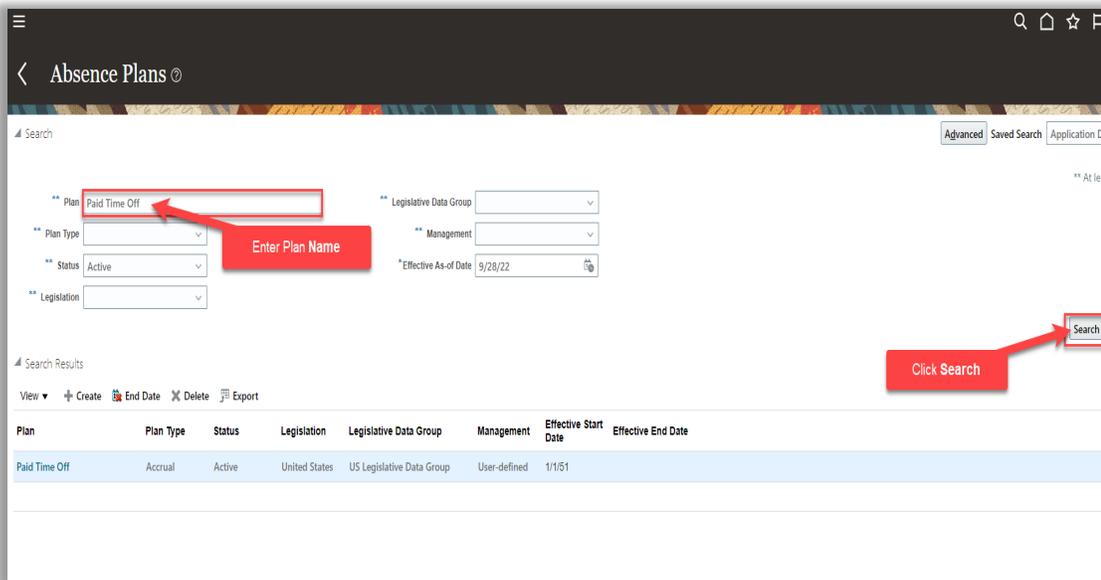
Next, click **Absences**



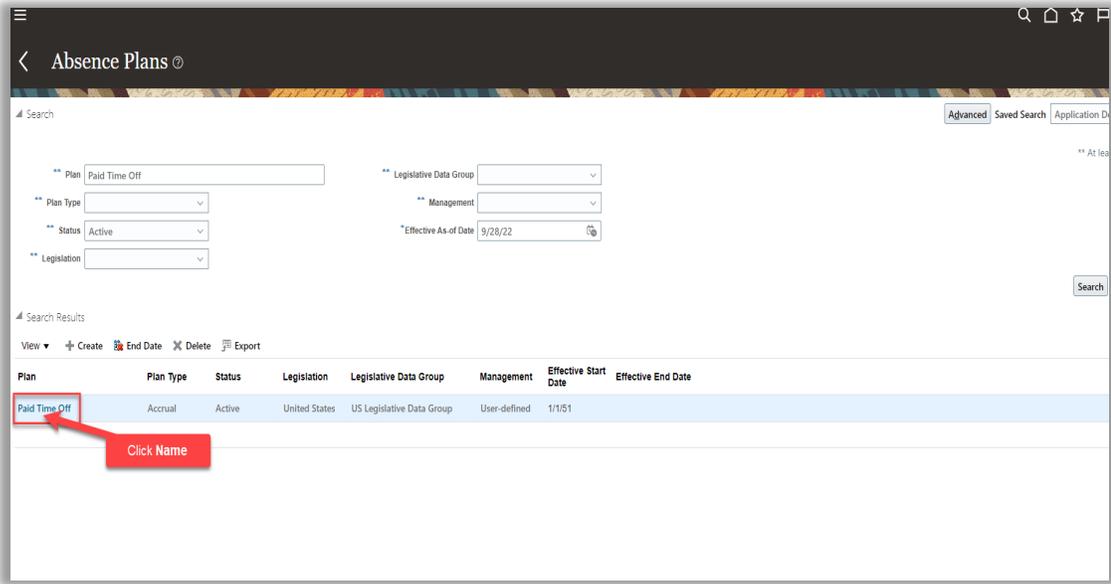
Scroll down and click **Absence Plans**. If preferred, we can also search the words **Absence Plans** in the Search box at the top



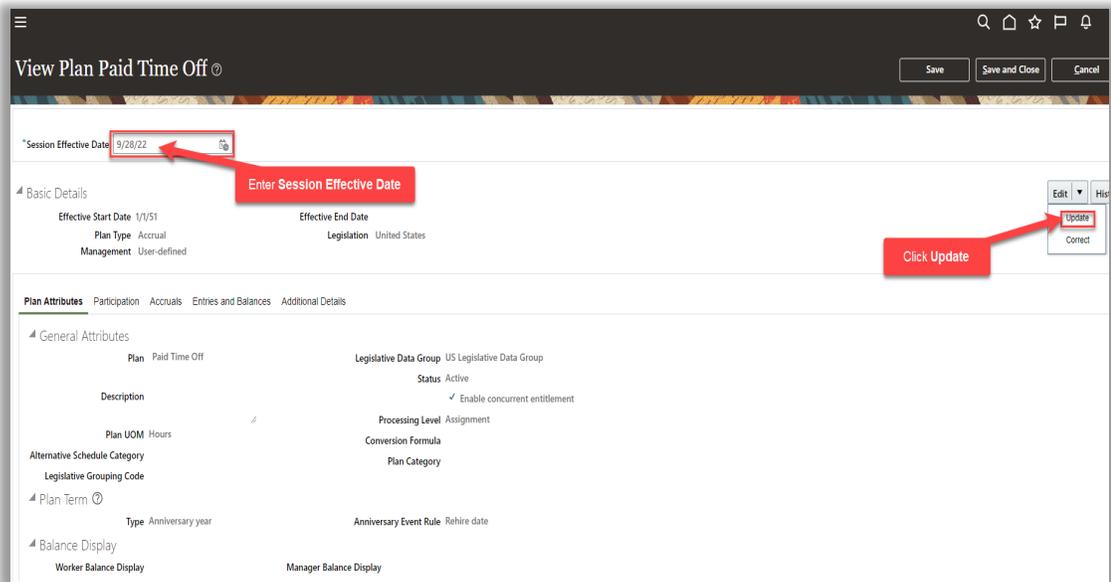
Enter the Absence Plans Name and click Search



Click Absence Plan Name



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

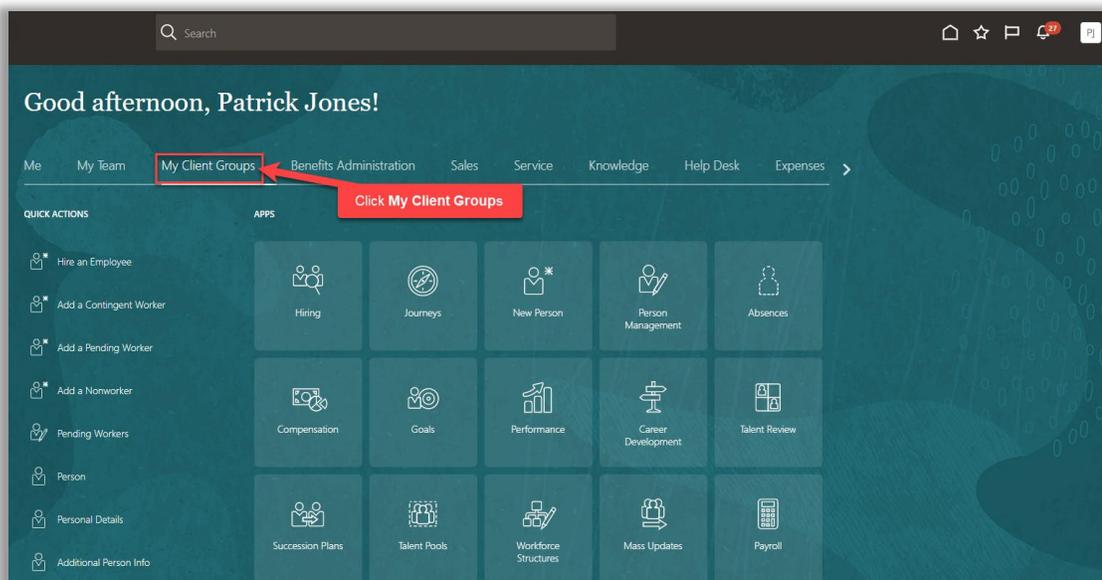


Update the applicable details and click **Save and Close**

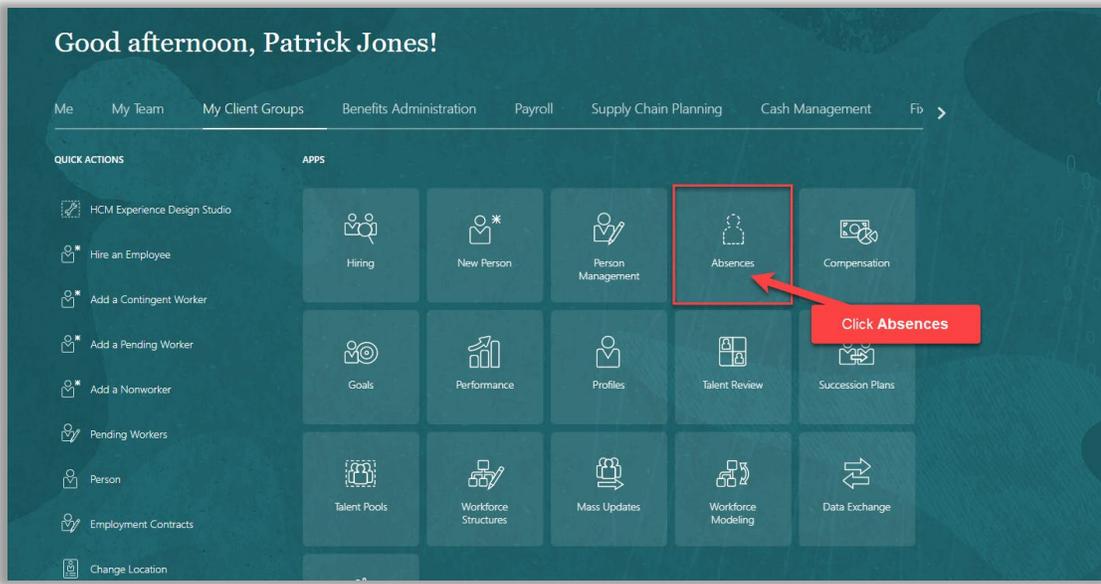
## Add Absence Types

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

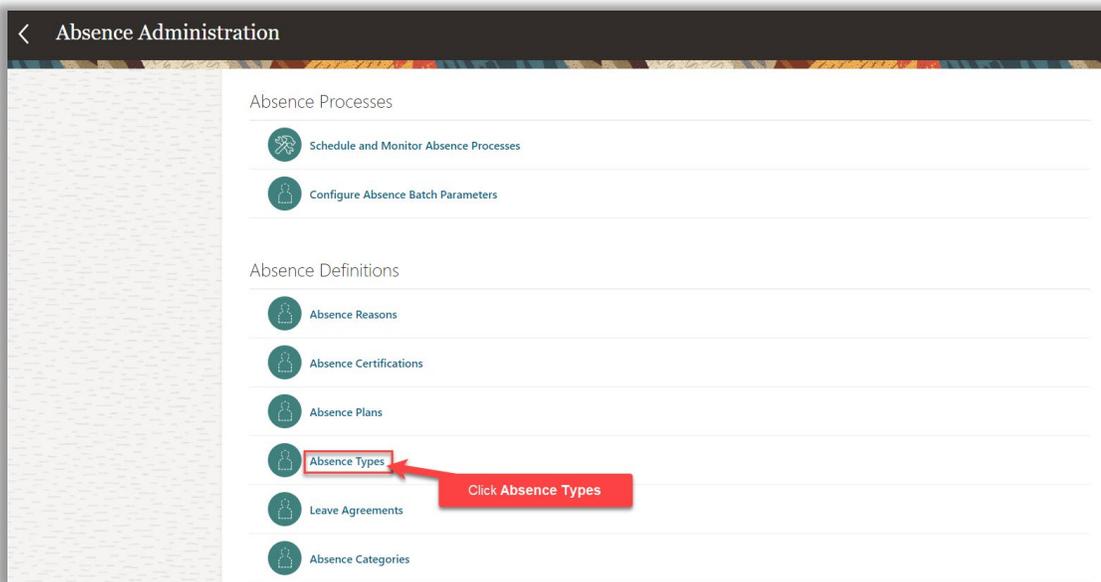
From the home screen, click **My Client Groups**



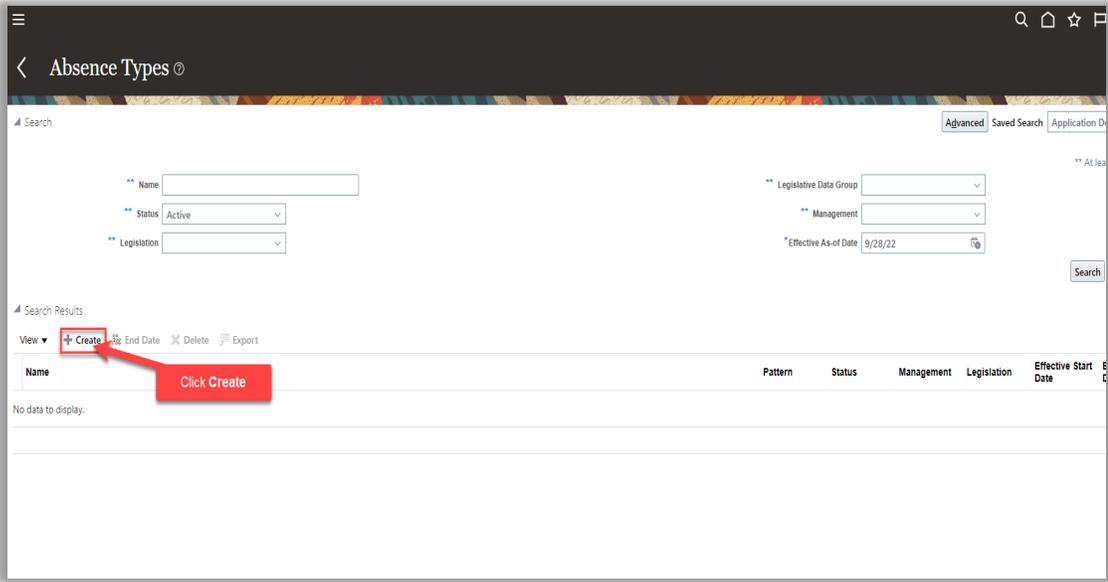
Next, click **Absences**



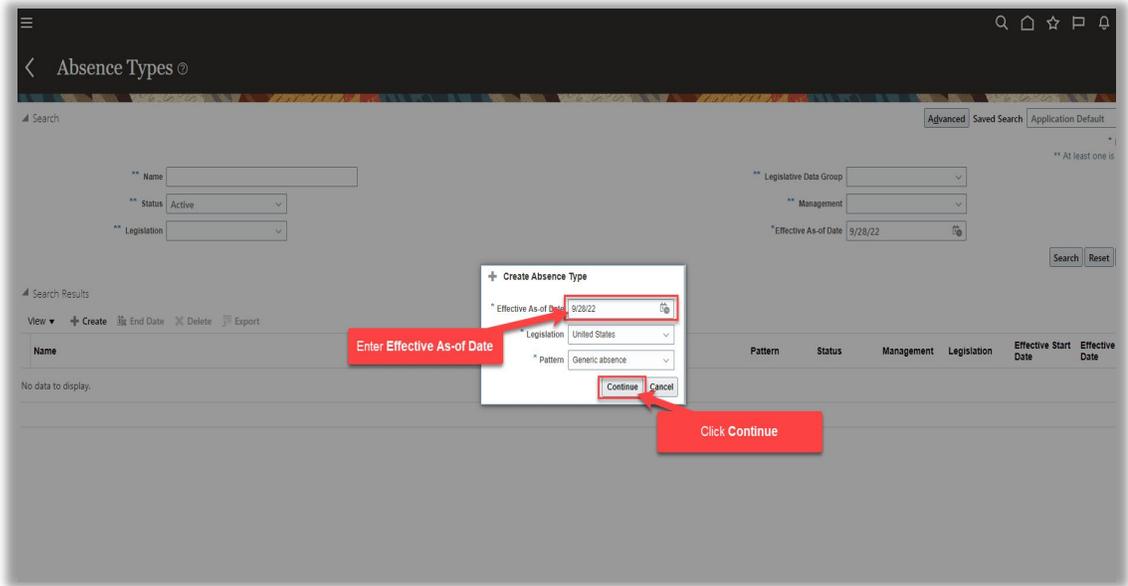
Scroll down and click **Absence Types**. If preferred, we can also search the words **Absence Types** in the Search box at the top



Click **Create**



Enter the **Effective As-of Date**, the **Legislation** and **Pattern** will default. These can be updated, if needed. 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:  **Enter Legislative Data Group**

\*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  Select and Add  Edit  End Date  Delete

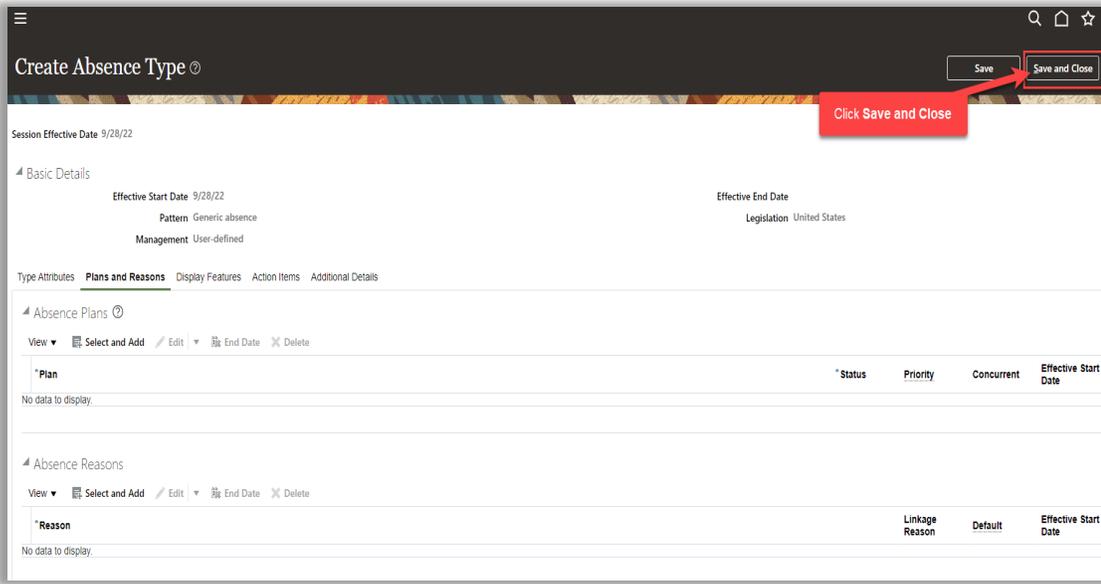
*Plan	*Status	Priority	Concurrent	Effective Start Date
No data to display.				

**Absence Reasons**

View  Select and Add  Edit  End Date  Delete

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

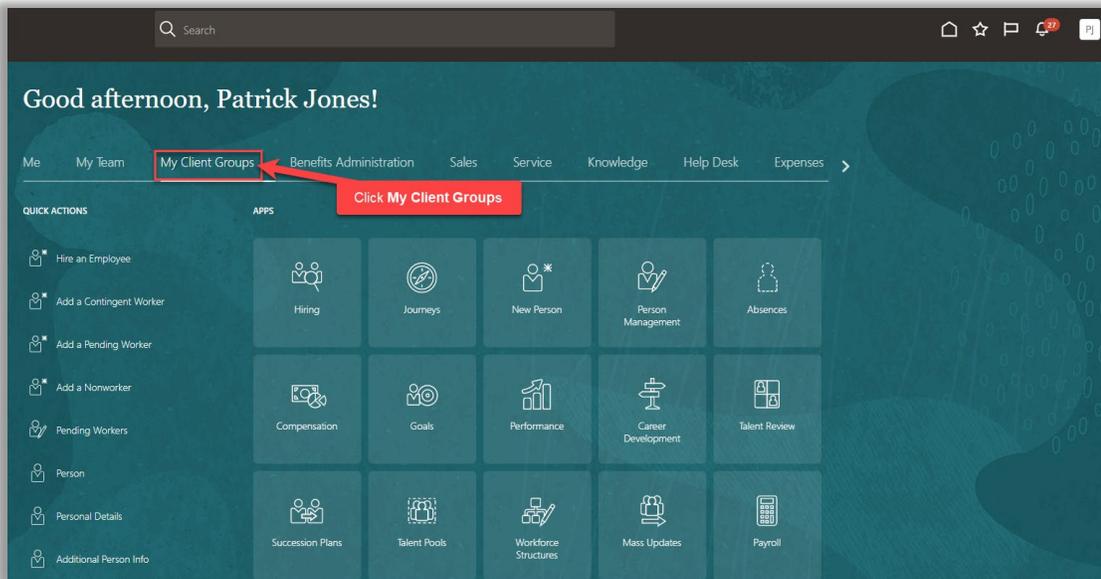
Click Save and Close



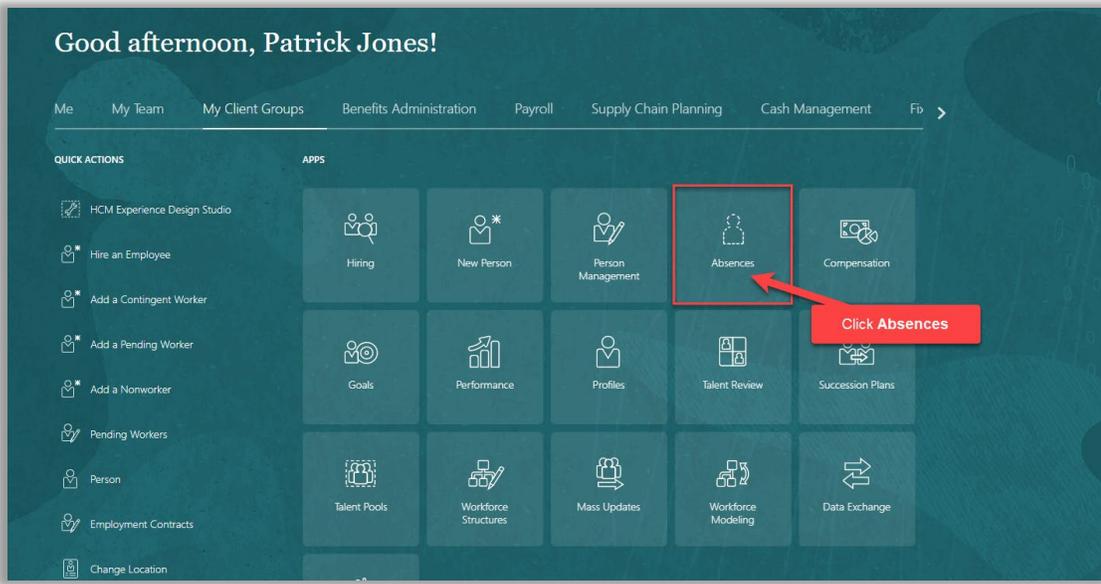
## Manage Absence Types

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

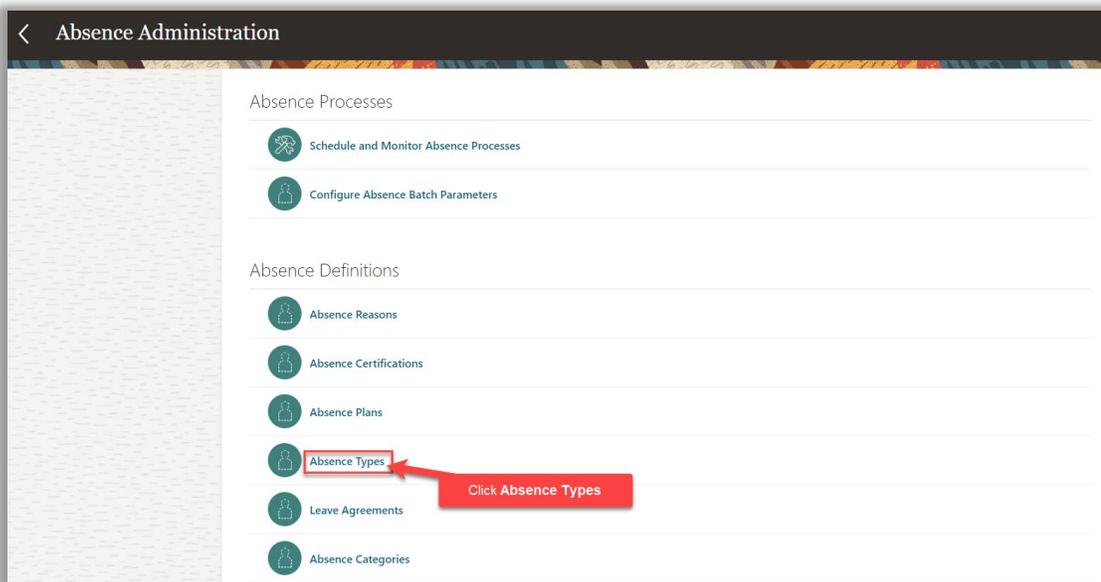
From the home screen, click **My Client Groups**



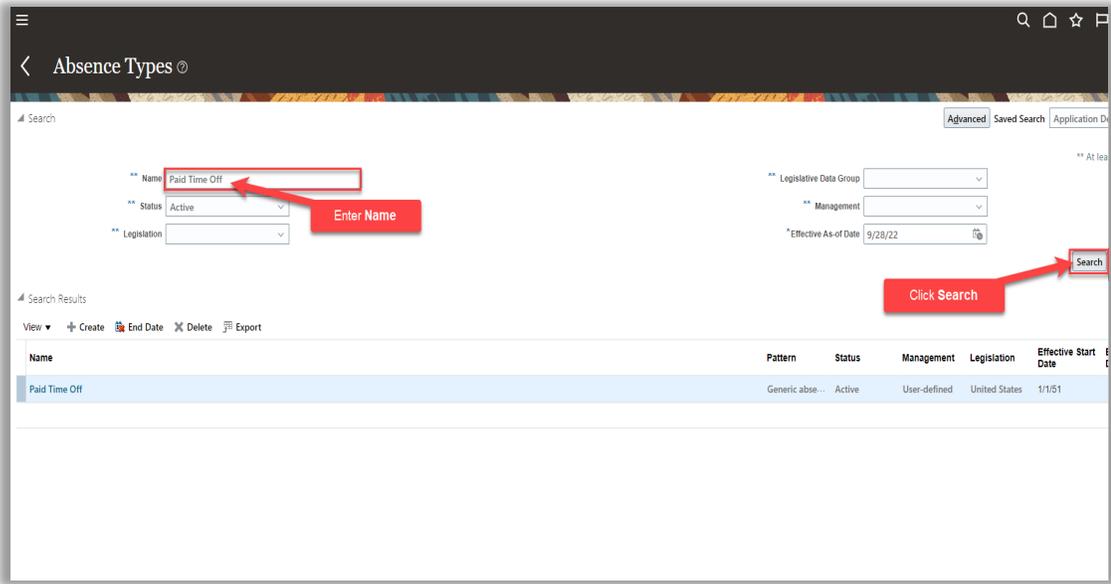
Next, click **Absences**



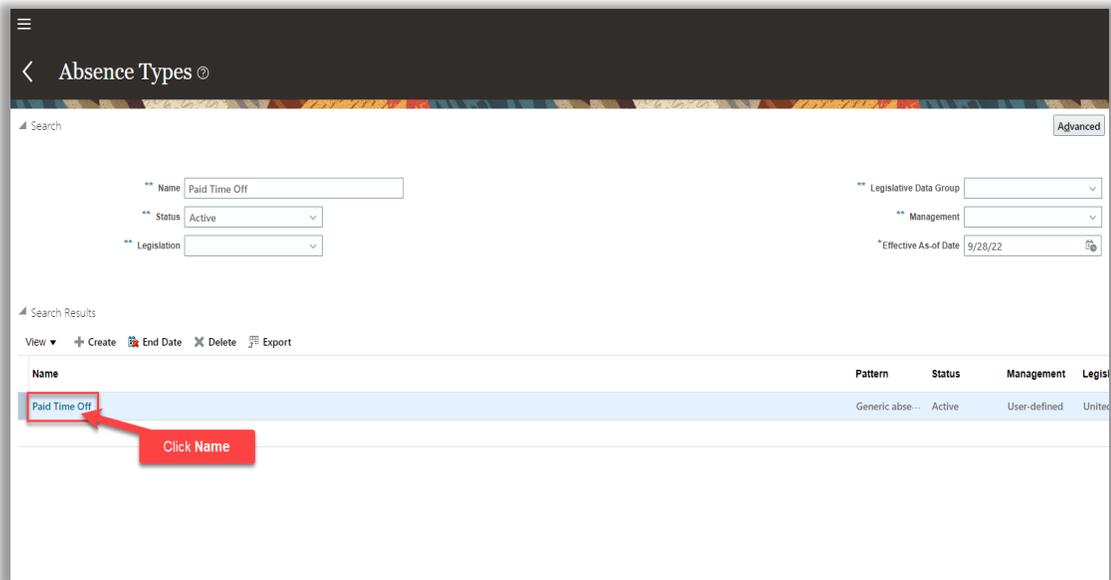
Scroll down and click **Absence Types**. If preferred, we can also search the words **Absence Types** in the Search box at the top



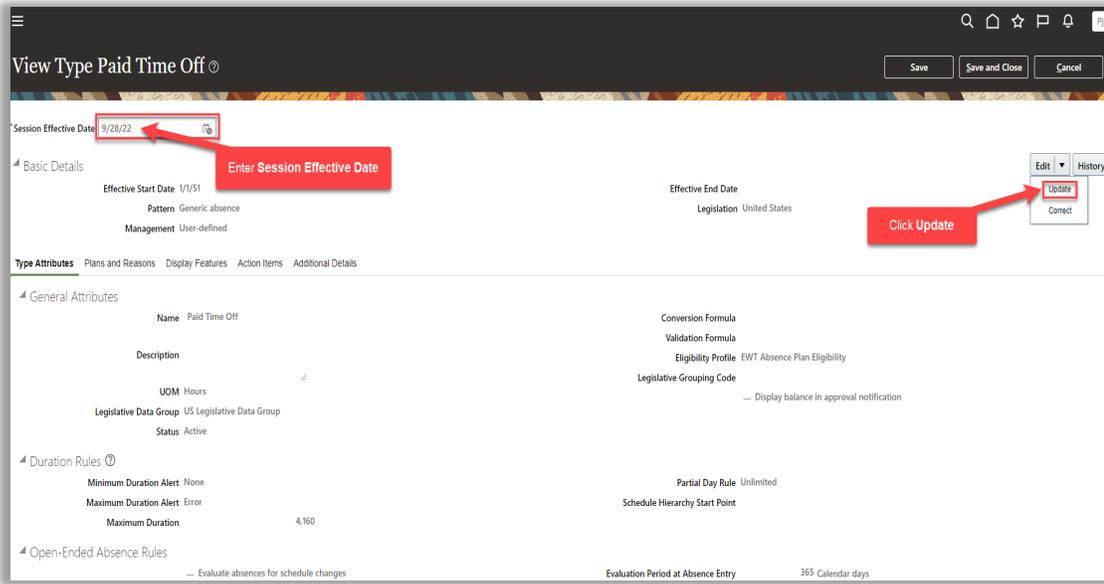
Enter the **Absence Type Name** and click **Search**



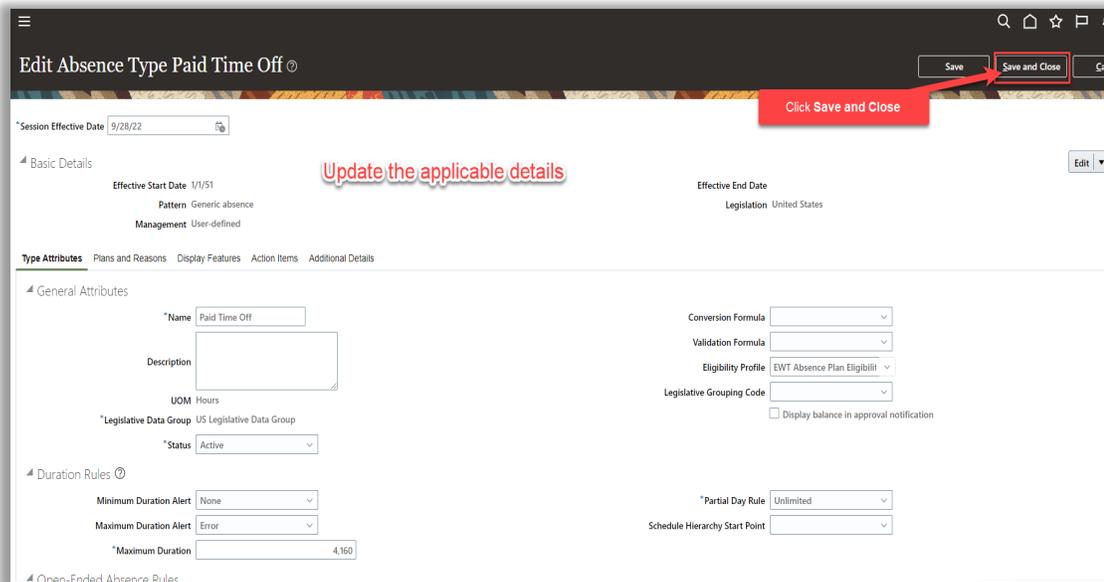
Click Absence Types Name



Enter the Session Effective Date then, Edit and Update



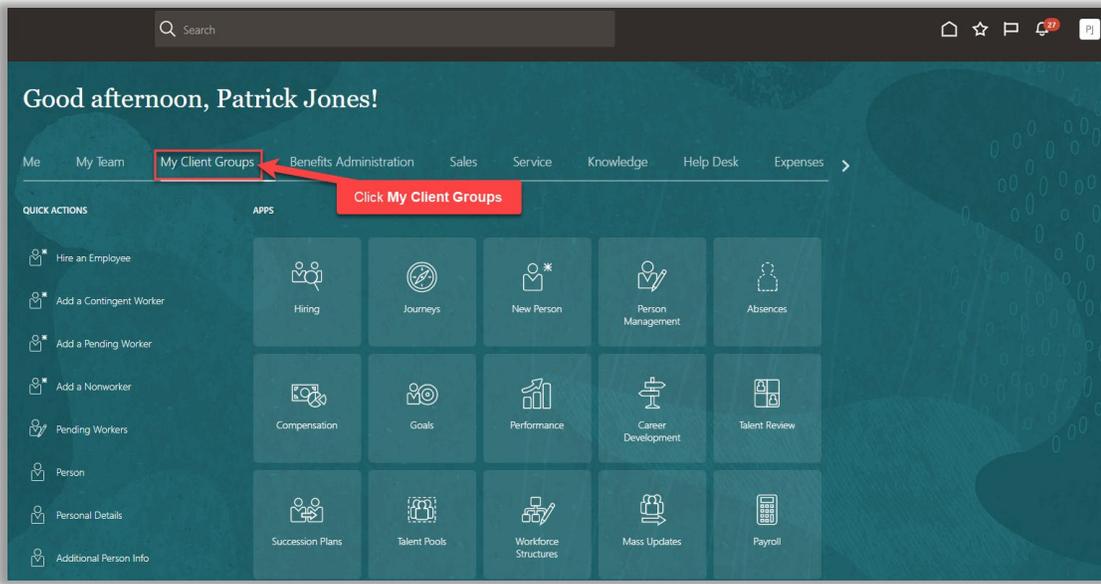
Update the applicable details and click **Save and Close**



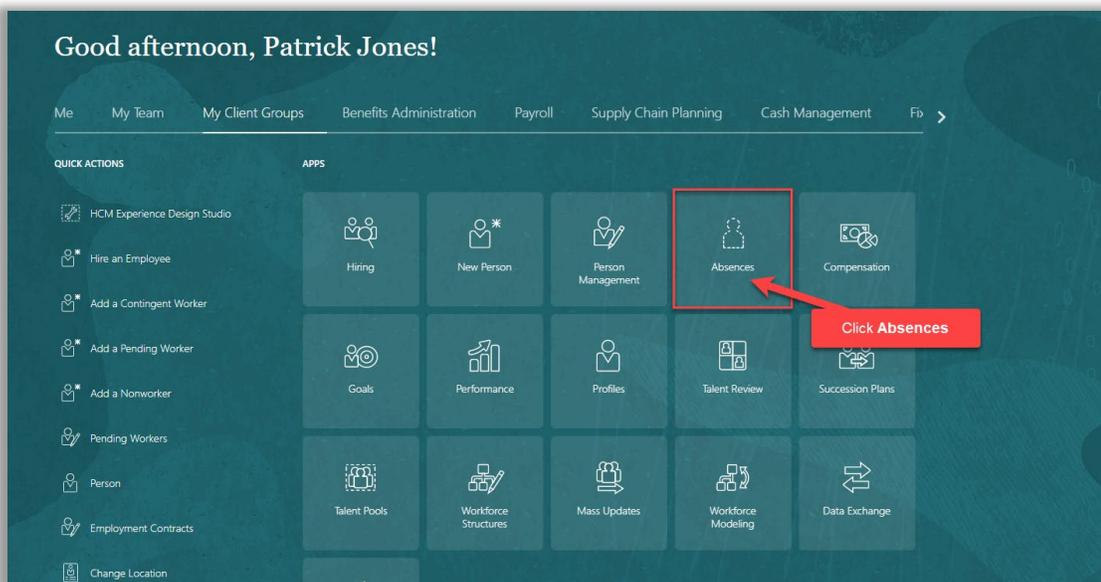
## Manage Repeating Time Periods

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

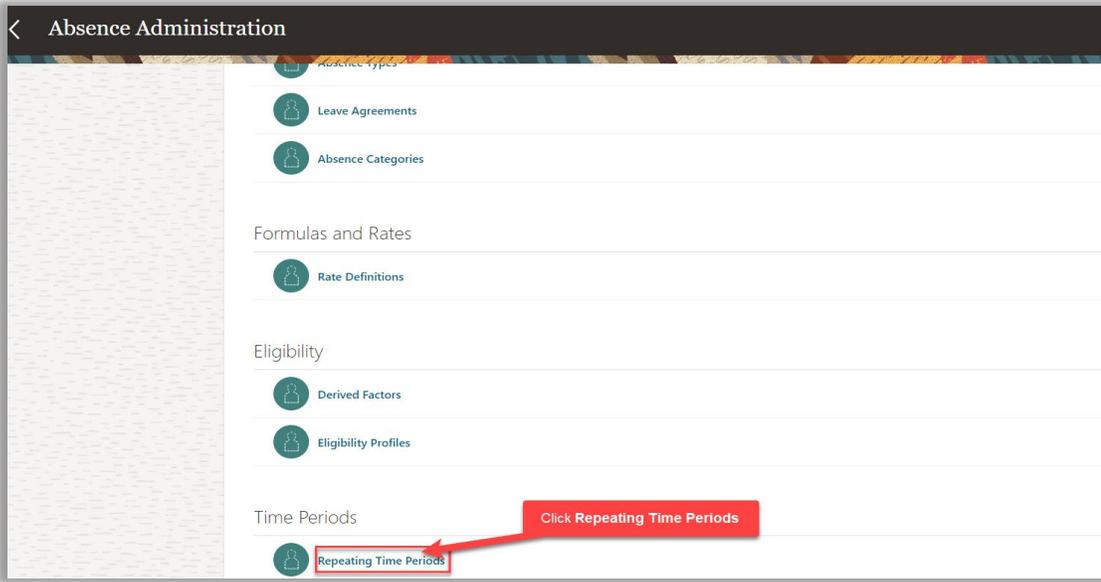
From the home screen, click **My Client Groups**



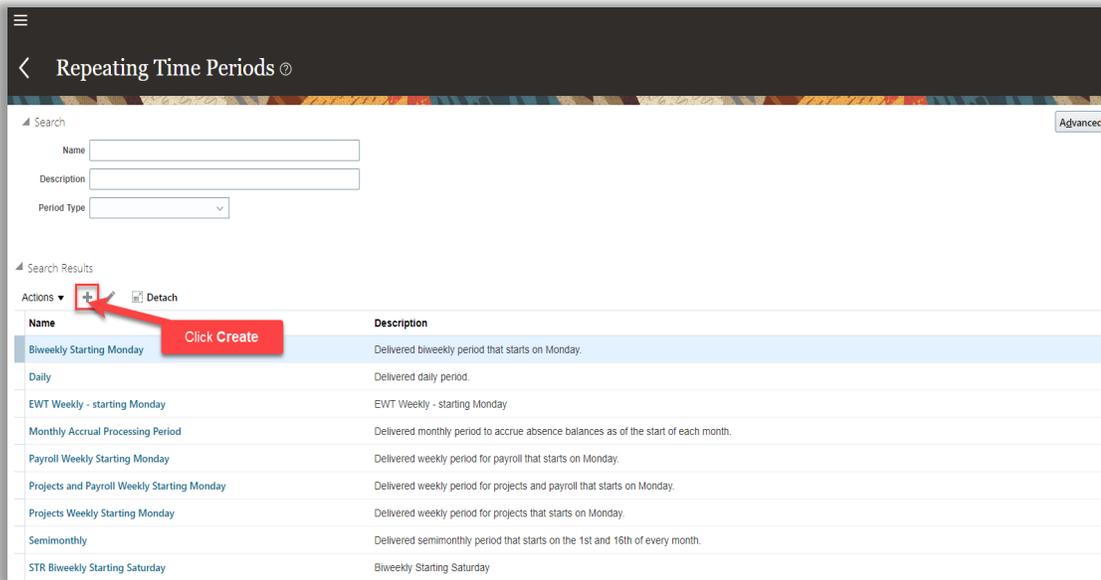
Next, click **Absences**



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**

**Create Repeating Time Period** Save and Close

\*Name: Monthly Accrual Enter Name

Description:

Period Usage:  Time Card,  Approval,  Accrual Processing,  Overtime,  Balances Select Period Usage

Period Definition: \*Period Type: Monthly, \*Period Length: Calendar month, \*Sample Start Date: 9/1/22 Select Type, Length, and Start Date

Time Period Preview: Preview Period Start Date: m/d/yy, Preview Period End Date: m/d/yy, Preview Time Periods

Click **Save and Close**

**Create Repeating Time Period** Save and Close

\*Name: Monthly Accrual Click Save and Close

Description:

\*Period Usage:  Time Card,  Approval,  Accrual Processing,  Overtime,  Balances

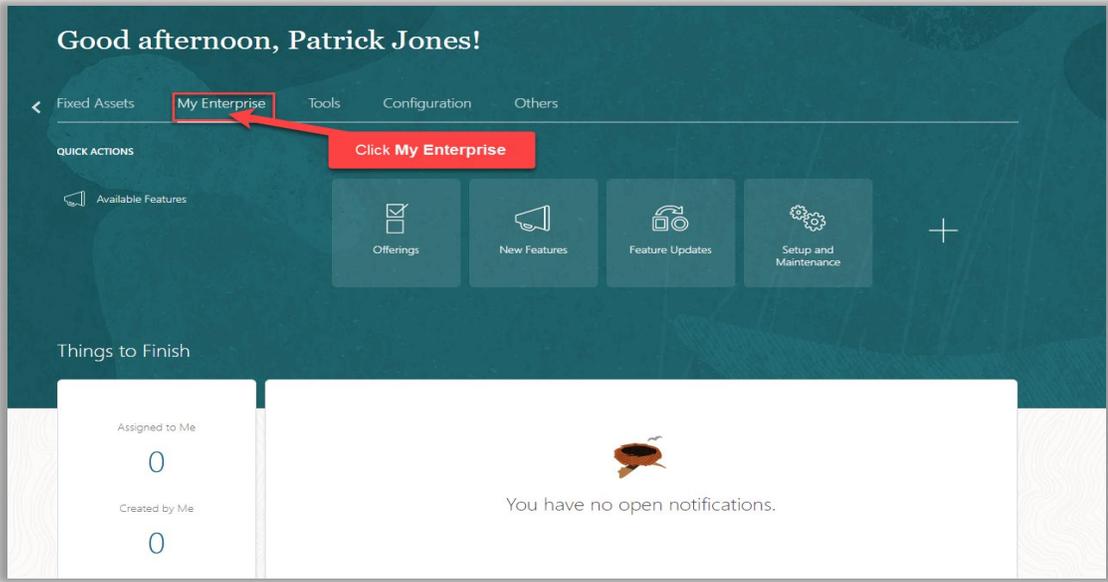
Period Definition: \*Period Type: Monthly, \*Period Length: Calendar month, \*Sample Start Date: 9/1/22

Time Period Preview: Preview Period Start Date: m/d/yy, Preview Period End Date: m/d/yy, Preview Time Periods

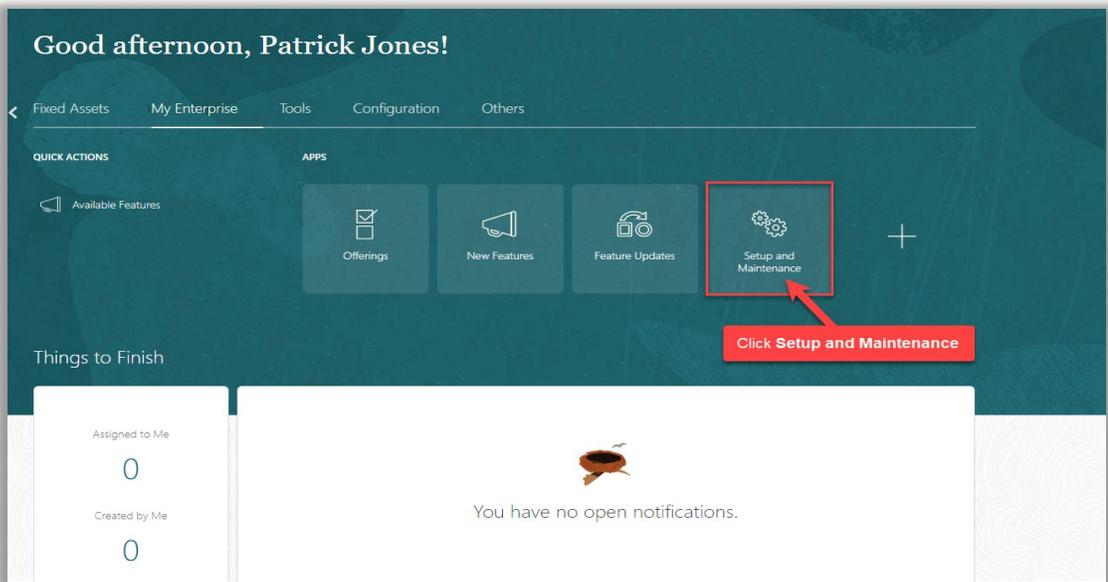
## Absence Fast Formulas

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

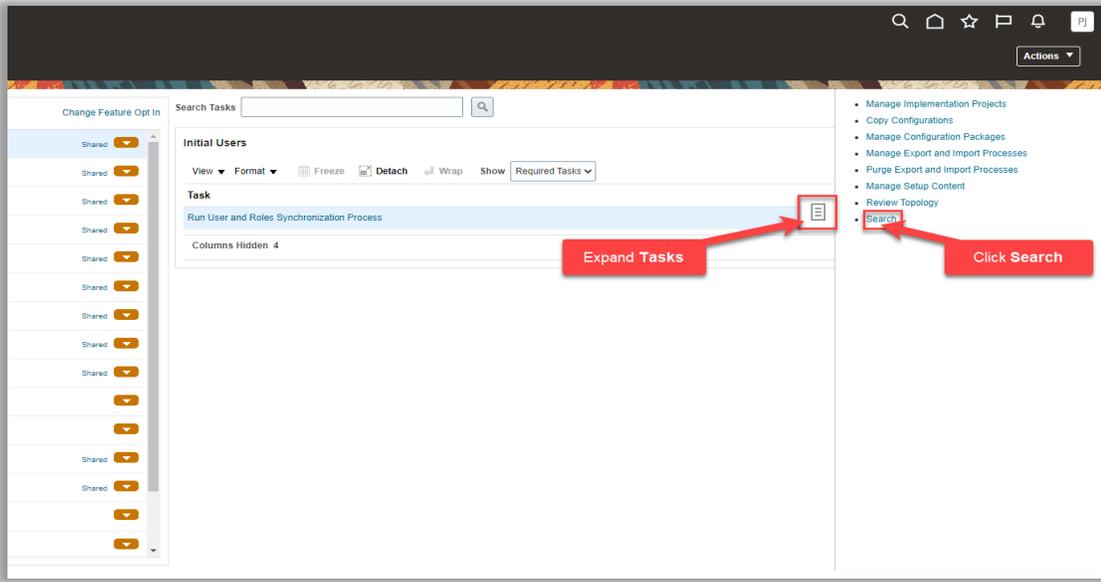
From the home screen, click **My Enterprise**



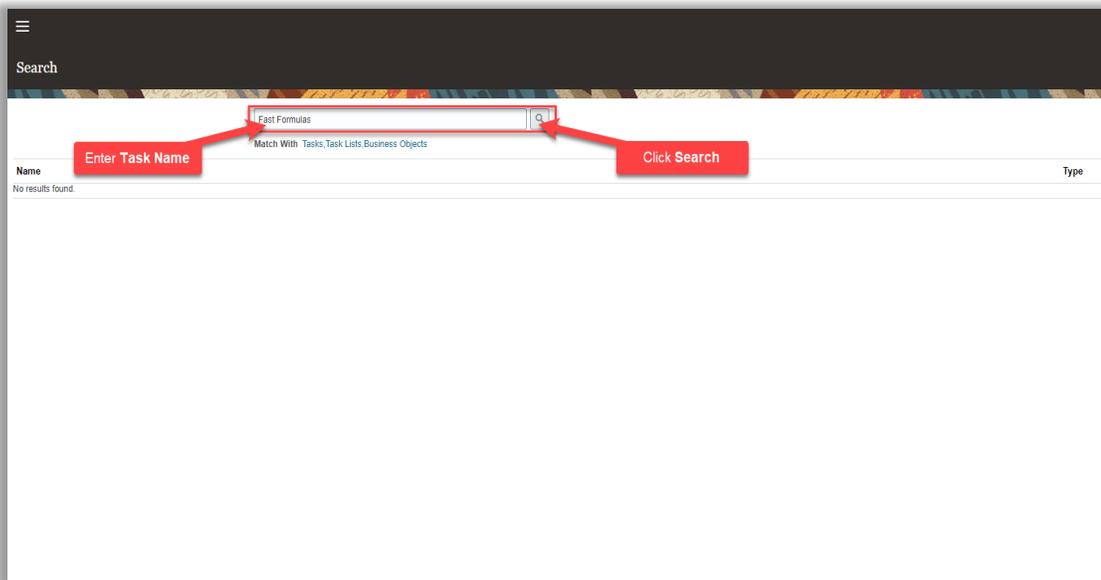
Click **Setup and Maintenance**



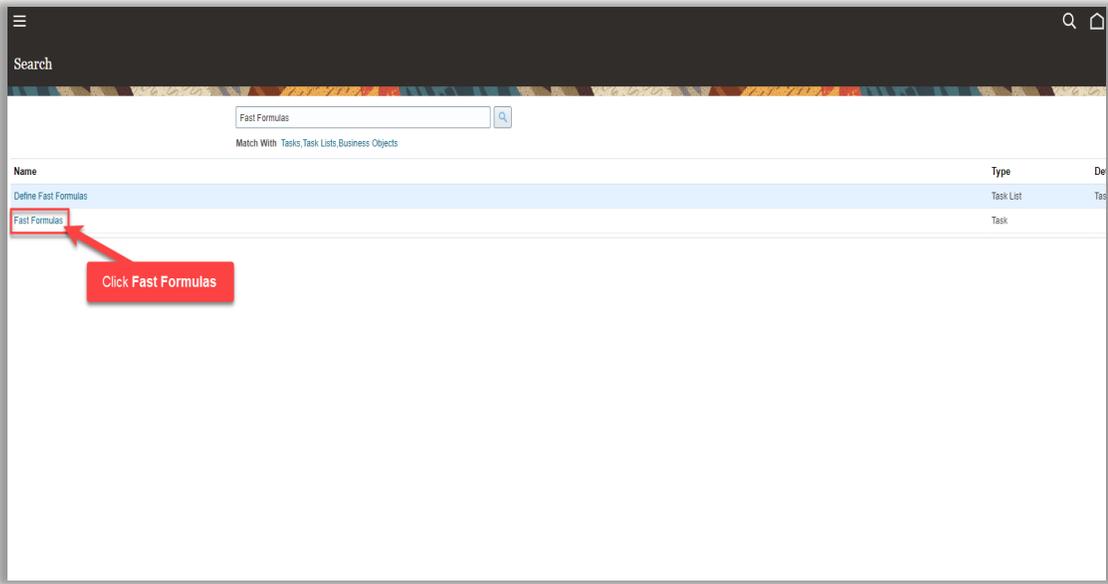
Expand the **Tasks** and click **Search**



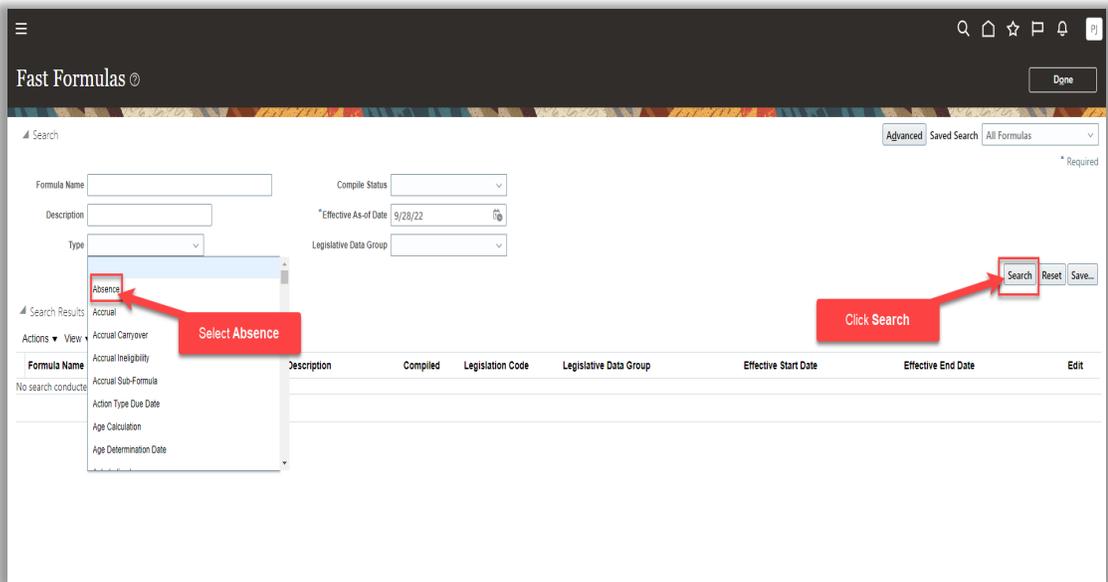
Enter Task Name **Fast Formulas** in the search bar and click **Search**



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

Actions View Format + X Edit Detach

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**

Search

Good afternoon, Patrick Jones!

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

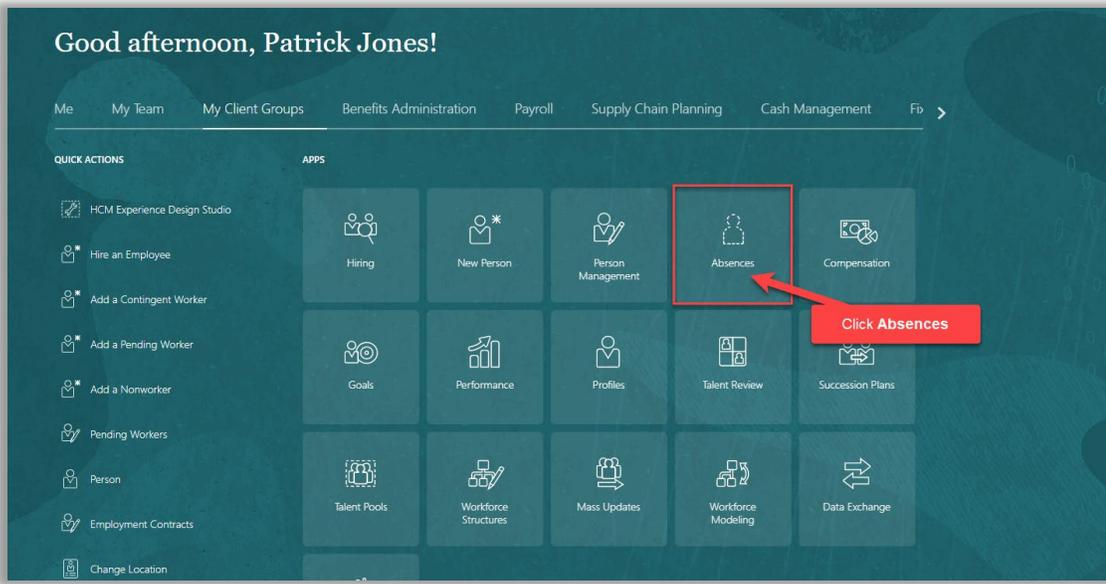
Click My Client Groups

QUICK ACTIONS

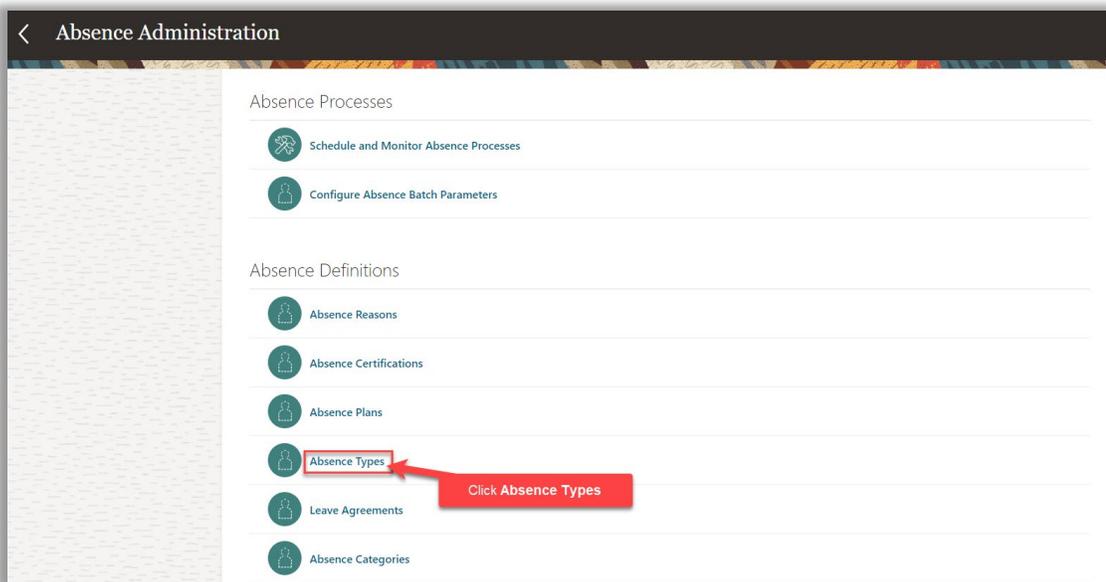
APPS

Hire an Employee	Hiring	Journeys	New Person	Person Management	Absences
Add a Contingent Worker	Compensation	Goals	Performance	Career Development	Talent Review
Add a Pending Worker	Succession Plans	Talent Pools	Workforce Structures	Mass Updates	Payroll
Add a Nonworker					
Pending Workers					
Person					
Personal Details					
Additional Person Info					

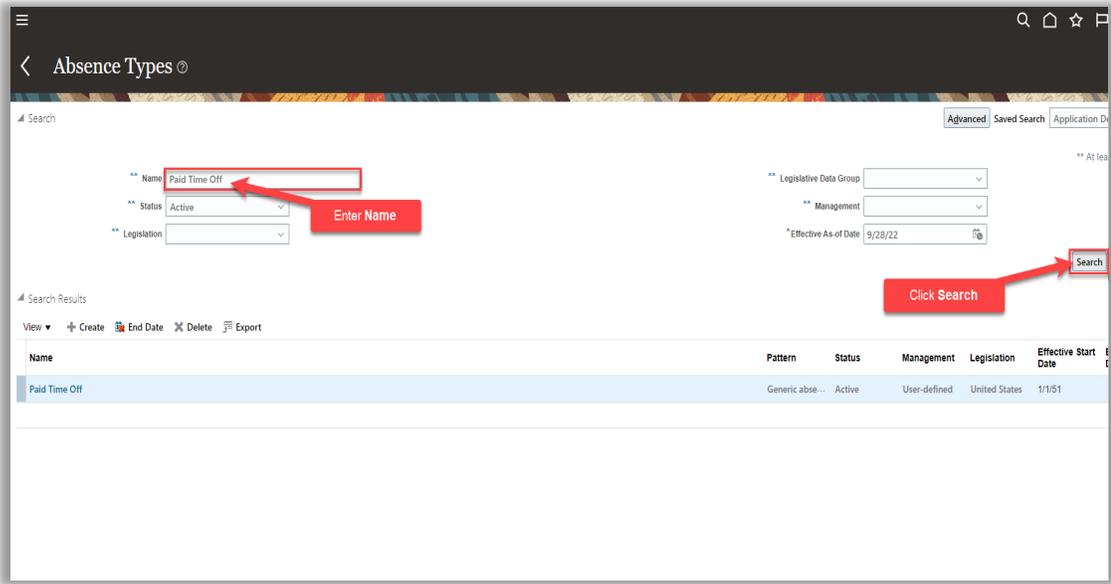
Next, click **Absences**



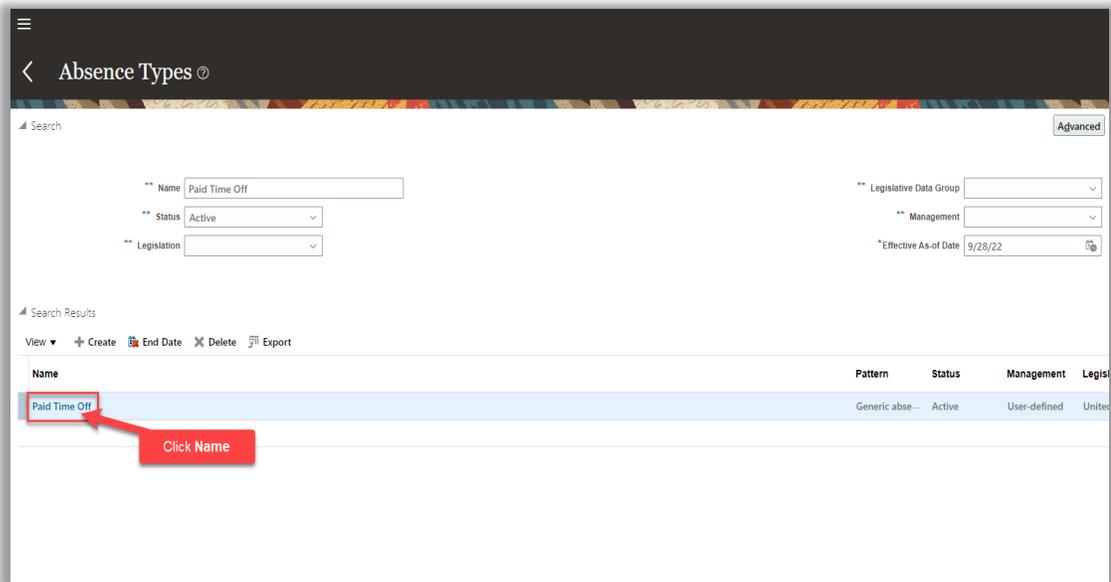
Scroll down and click **Absence Types**. If preferred, we can also search the words **Absence Types** in the Search box at the top



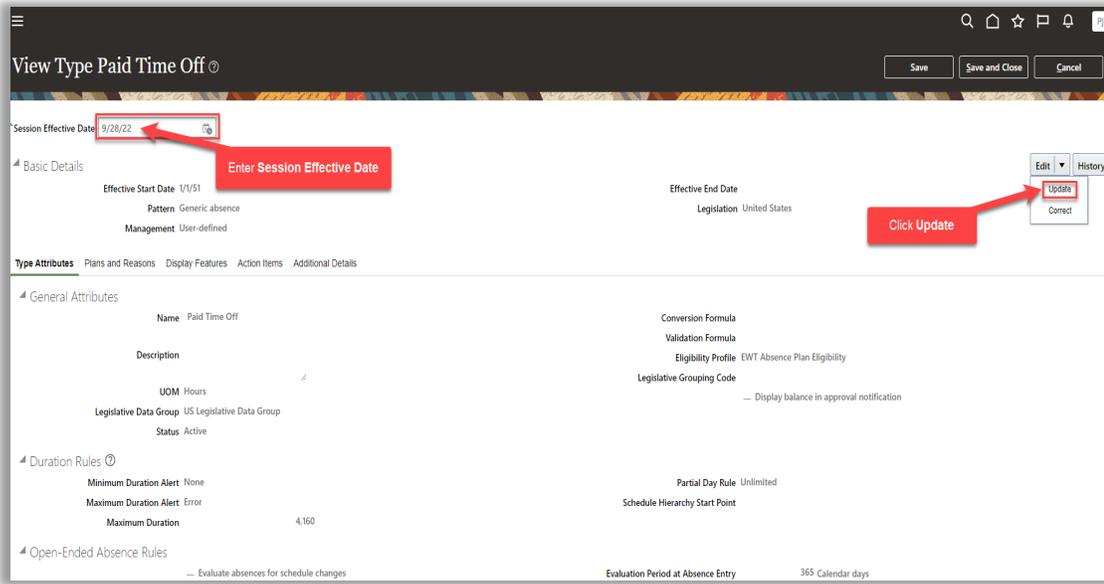
Enter the **Absence Type Name** and click **Search**



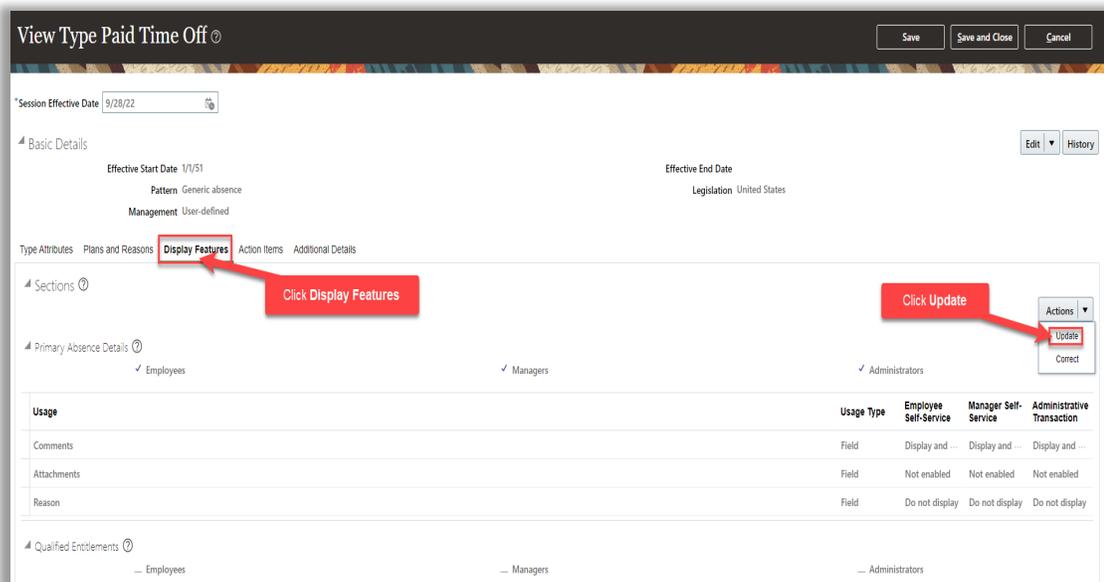
Click Absence Types Name



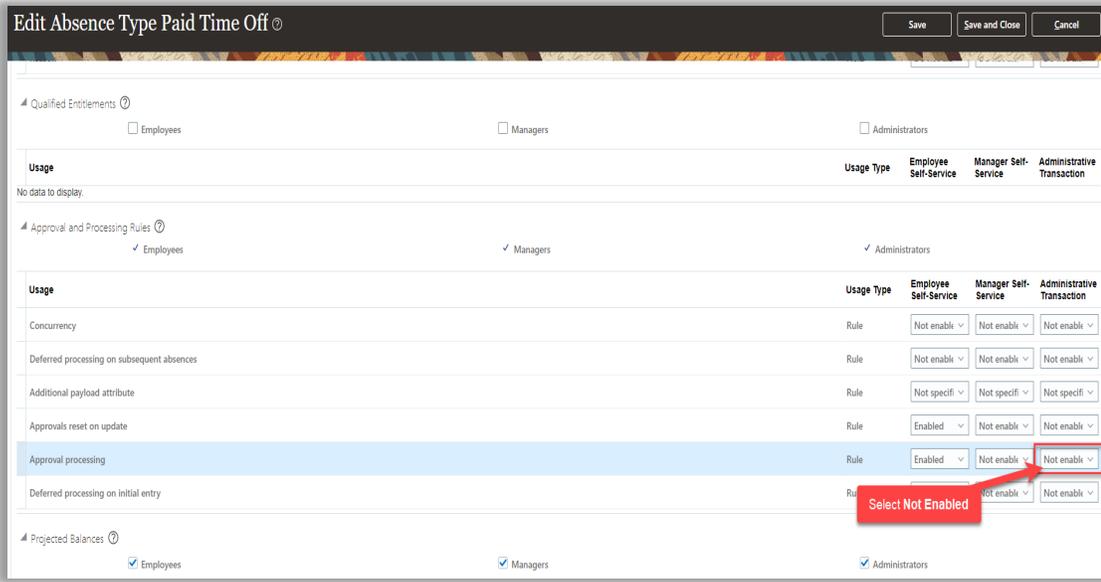
Enter the Session Effective Date then, Edit and Update



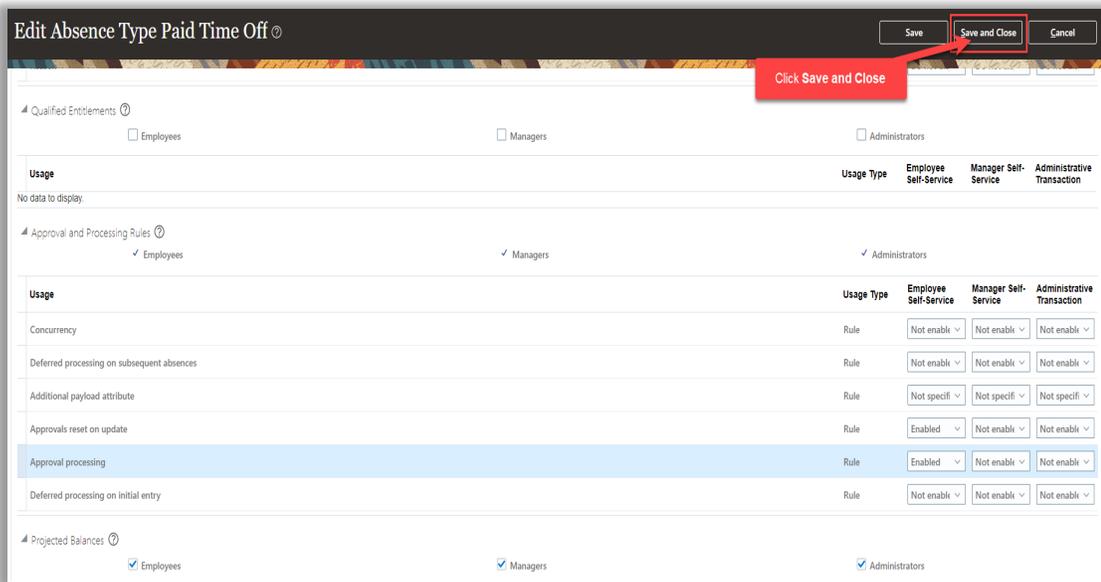
Click the **Display Features** tab and click **Actions** then **Update**



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



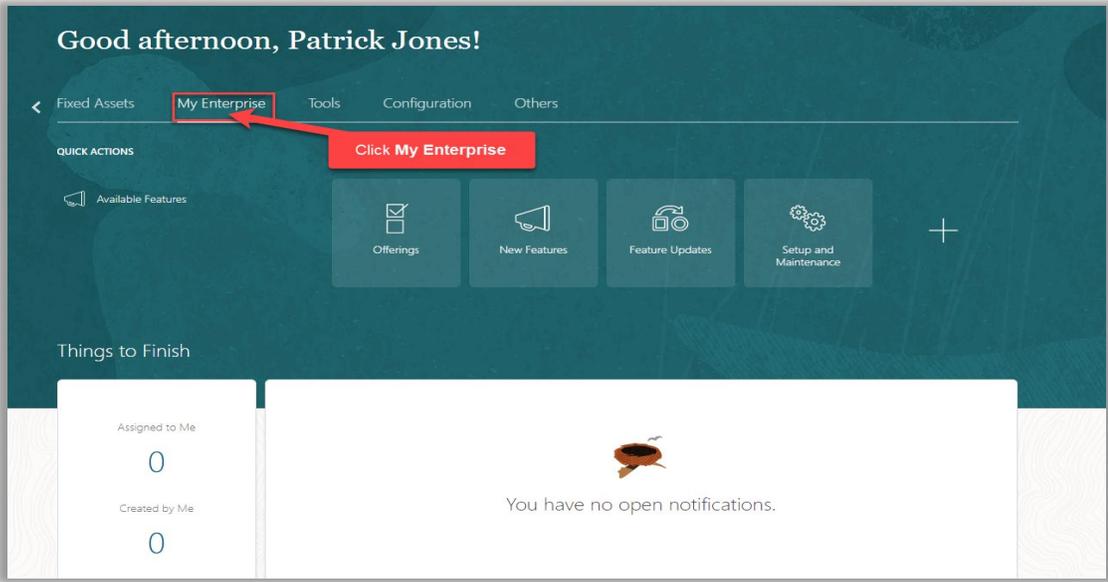
Click Save and Close



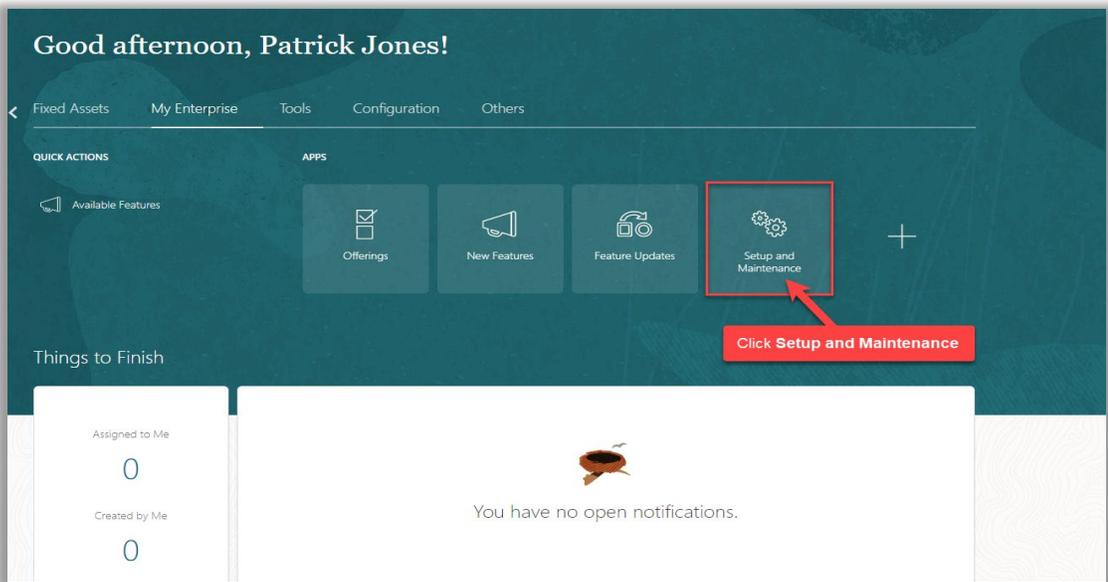
## Add Absence Plan Balance Adjustment Reasons

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

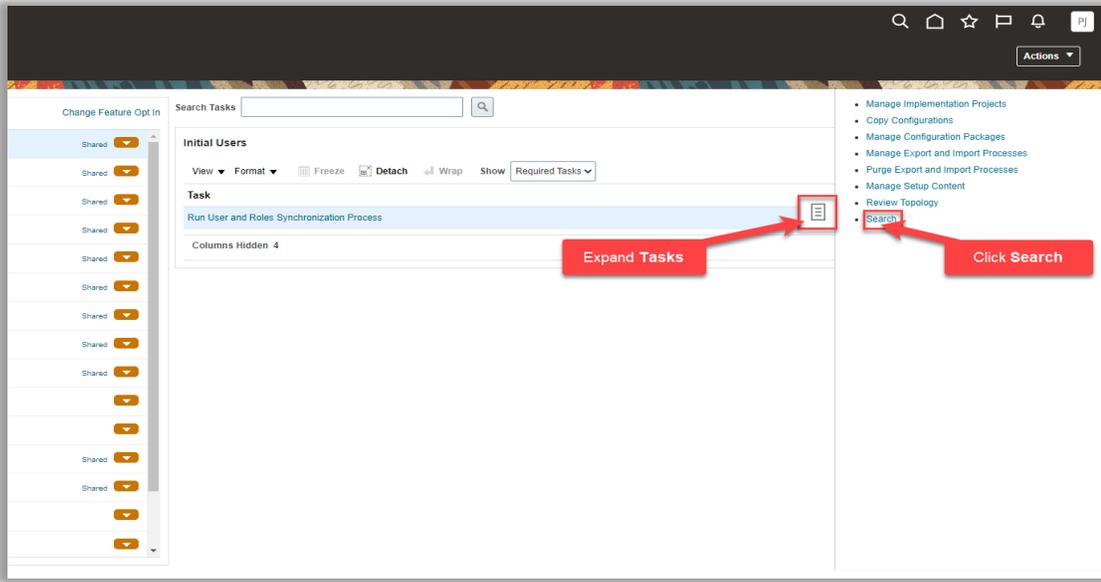
From the home screen, click **My Enterprise**



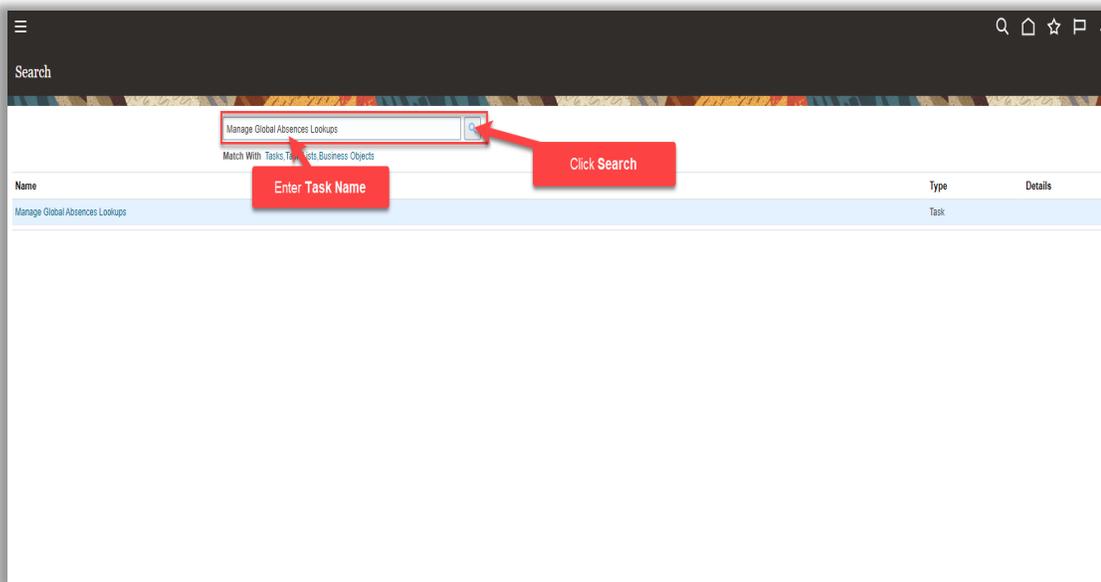
Click **Setup and Maintenance**



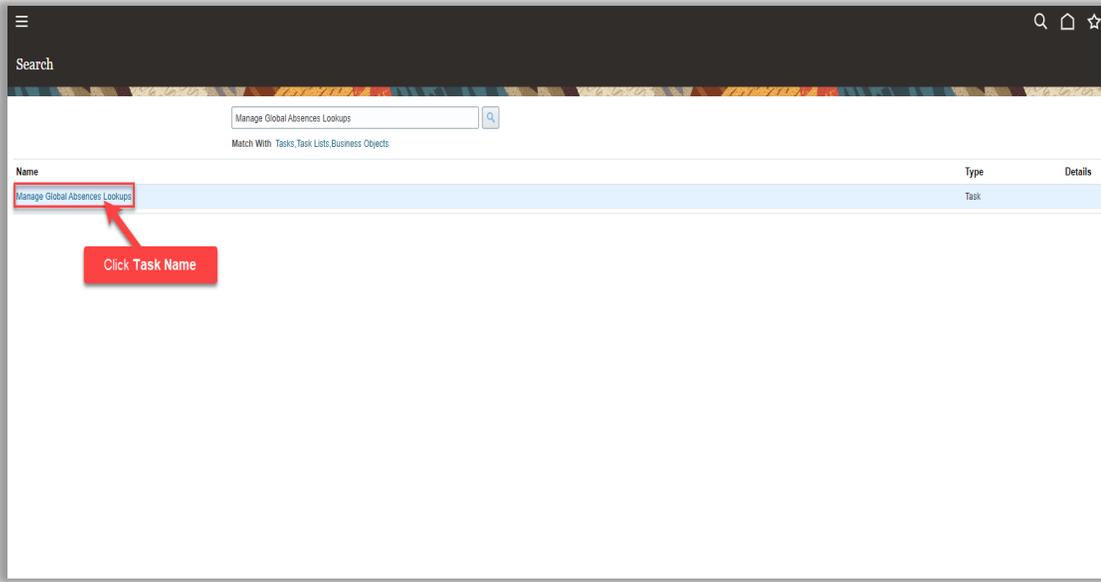
Expand the **Tasks** and click **Search**



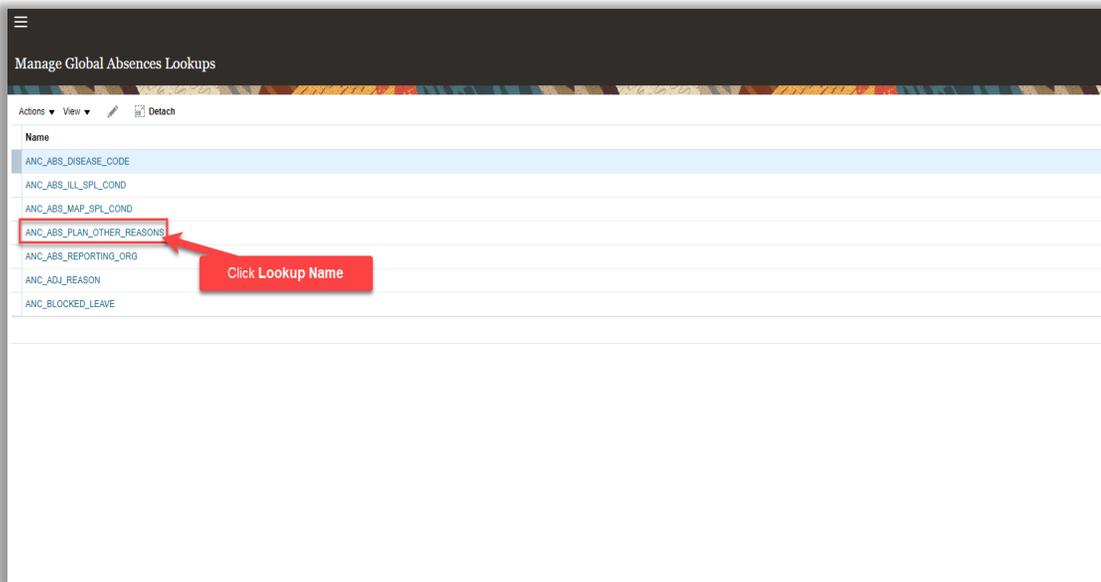
Enter Task Name **Manage Global Absences Lookups** in the search bar and click **Search**



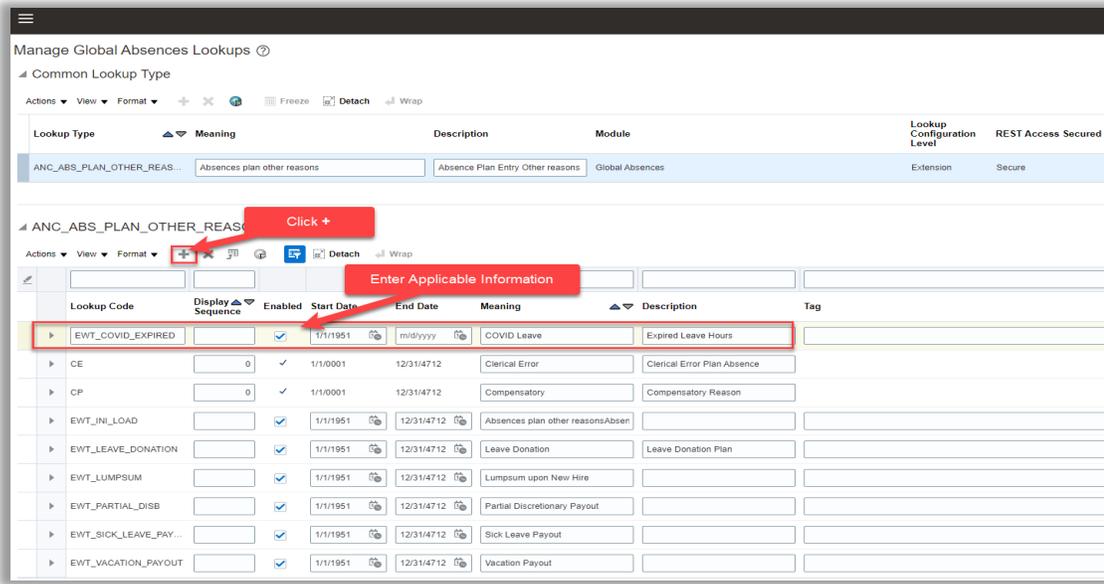
Click **Manage Global Absences Lookup**



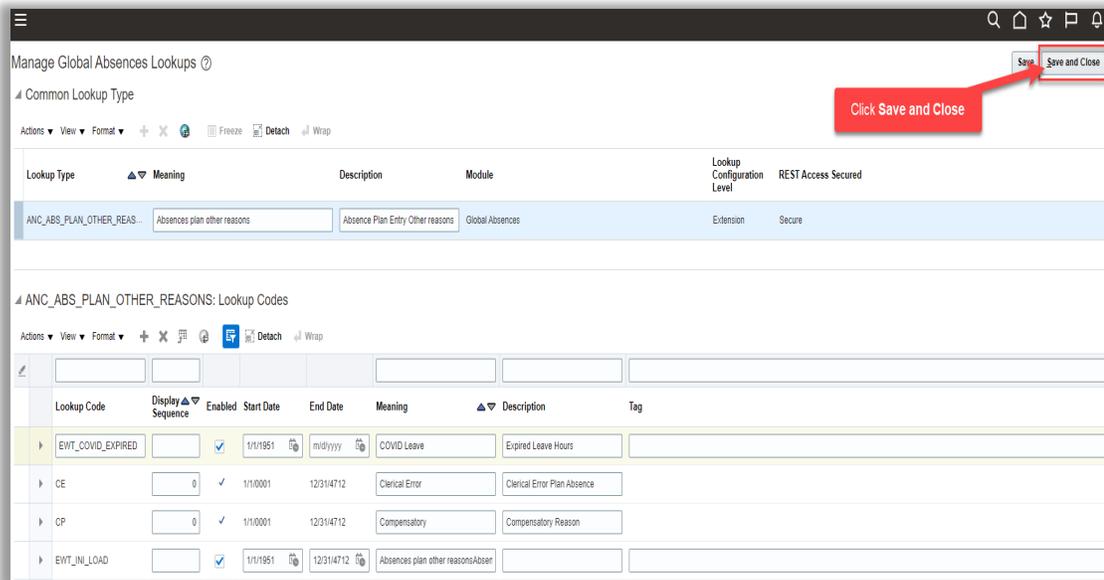
Click **ANC\_ABS\_PLAN\_OTHER\_REASONS**



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



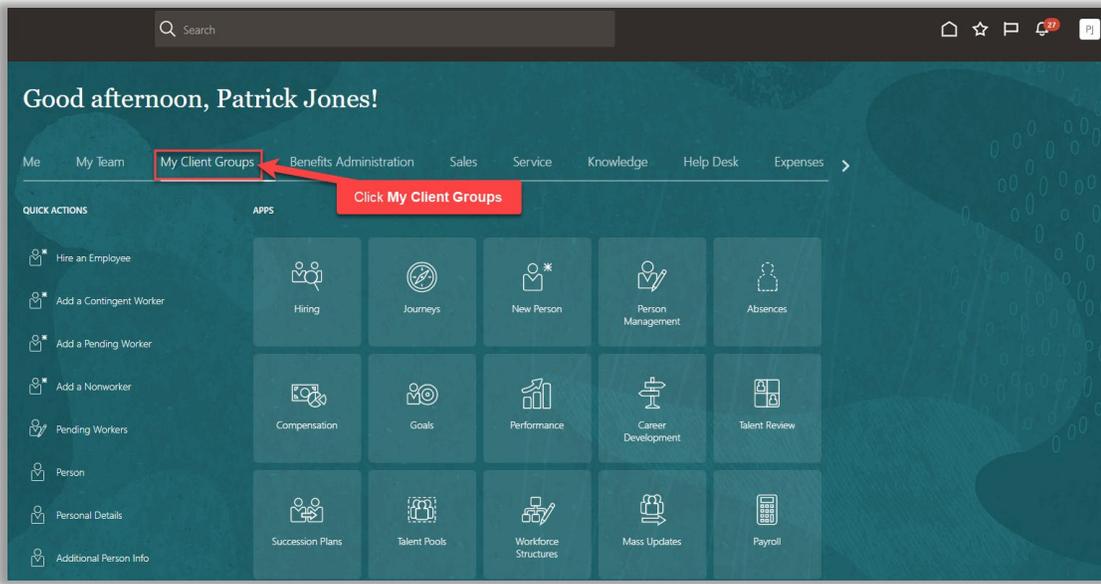
Click Save and Close



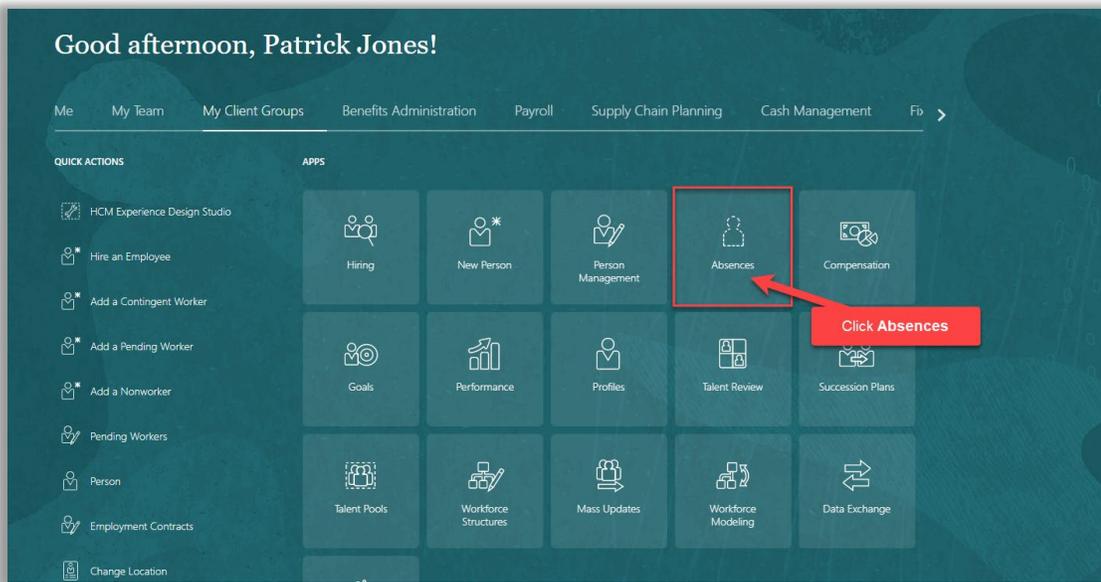
## Settings To Allow HR To Enter Absence With A Negative Balance

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

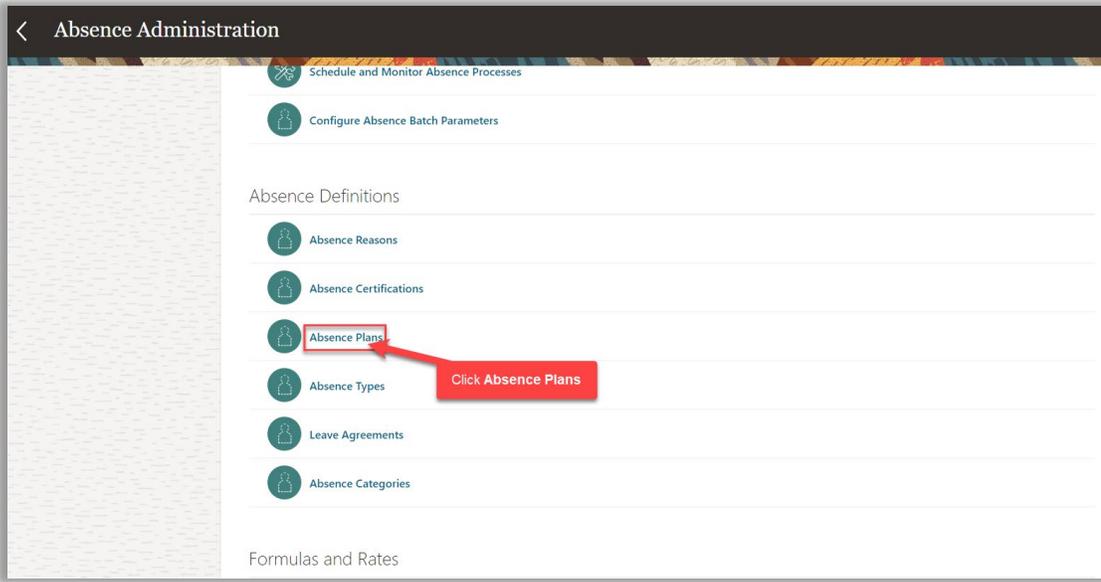
From the home screen, click **My Client Groups**



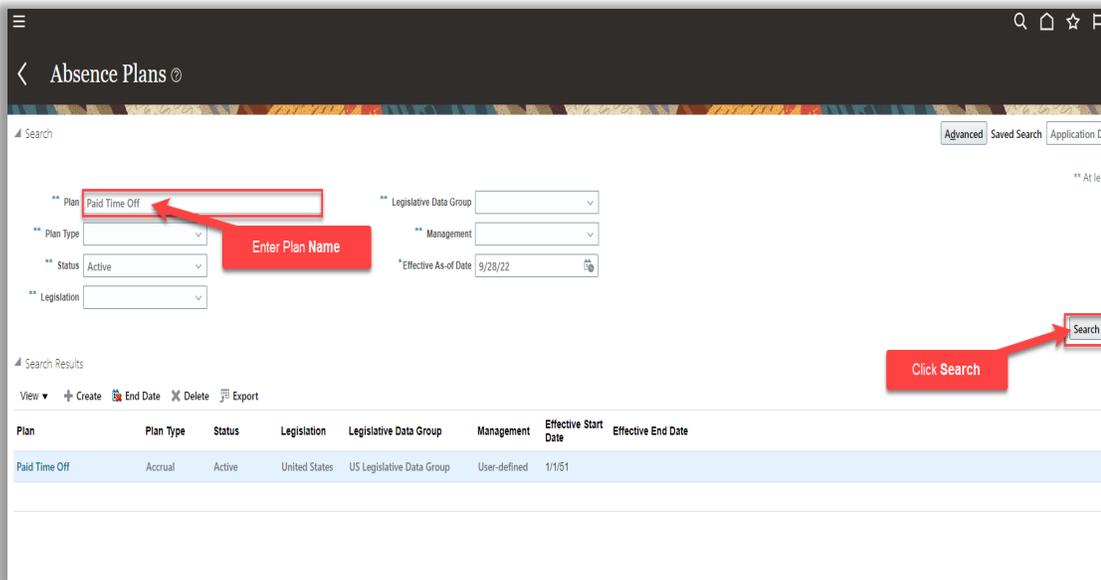
Next, click **Absences**



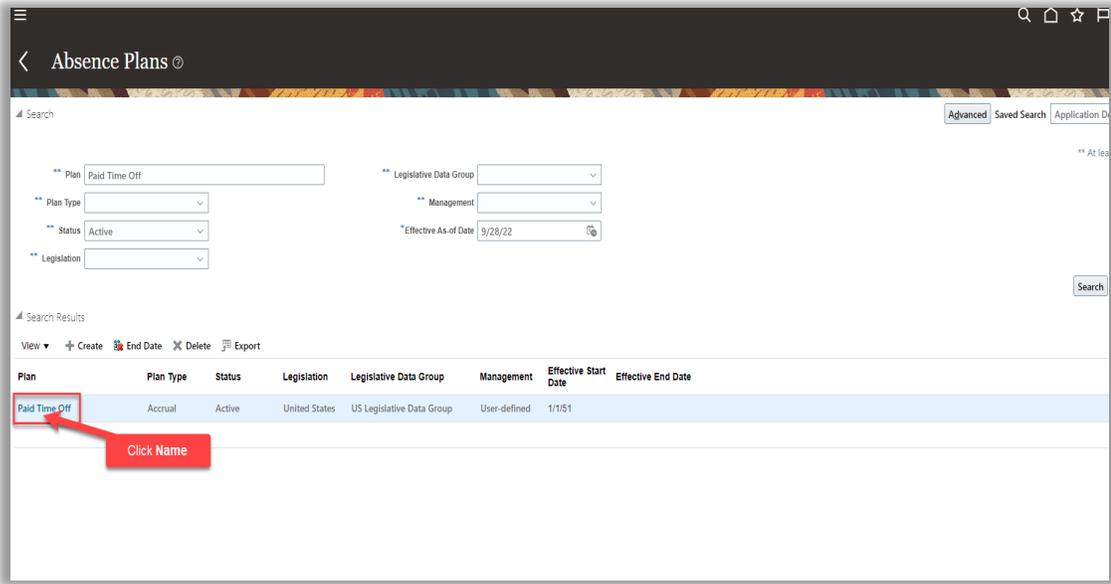
Scroll down and click **Absence Plans**. If preferred, we can also search the words **Absence Plans** in the Search box at the top



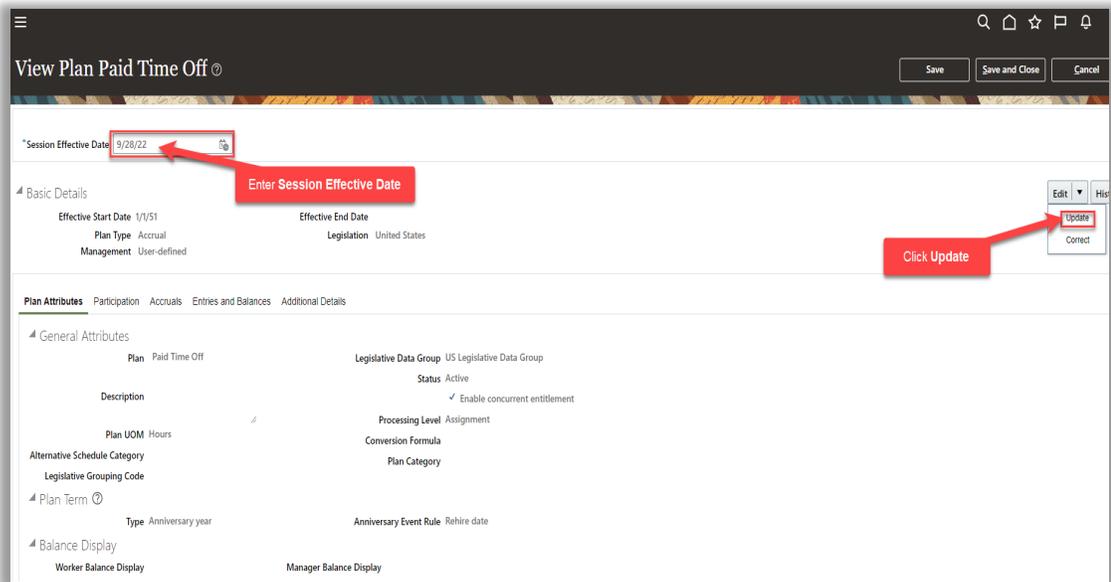
Enter the Absence Plans Name and click Search



Click Absence Plan Name



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

Session Effective Date: 9/28/22

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

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

Accrual Attributes:
 

- Accrual Definition: Matrix (selected), Formula
- Payment Percentage: 100 %
- Accrual Method: Incremental
- Partial Accrual Period: Formula
- Accrual Proration Rule: None
- Vesting Rule: None
- Balance Frequency Source: Person primary frequency

Plan Limits:
 

- Ceiling Rule: Include in matrix
- Ceiling Proration Rule: None
- Limit Proration Rule:
- Allow negative balance
- Negative Balance Limit:  Hours

Year End Processing

Click Save and Close

Session Effective Date: 9/28/22

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

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

Accrual Attributes:
 

- Accrual Definition: Matrix (selected), Formula
- Payment Percentage: 100 %
- Accrual Method: Incremental
- Partial Accrual Period: Formula
- Accrual Proration Rule: None
- Vesting Rule: None
- Balance Frequency Source: Person primary frequency

Plan Limits:
 

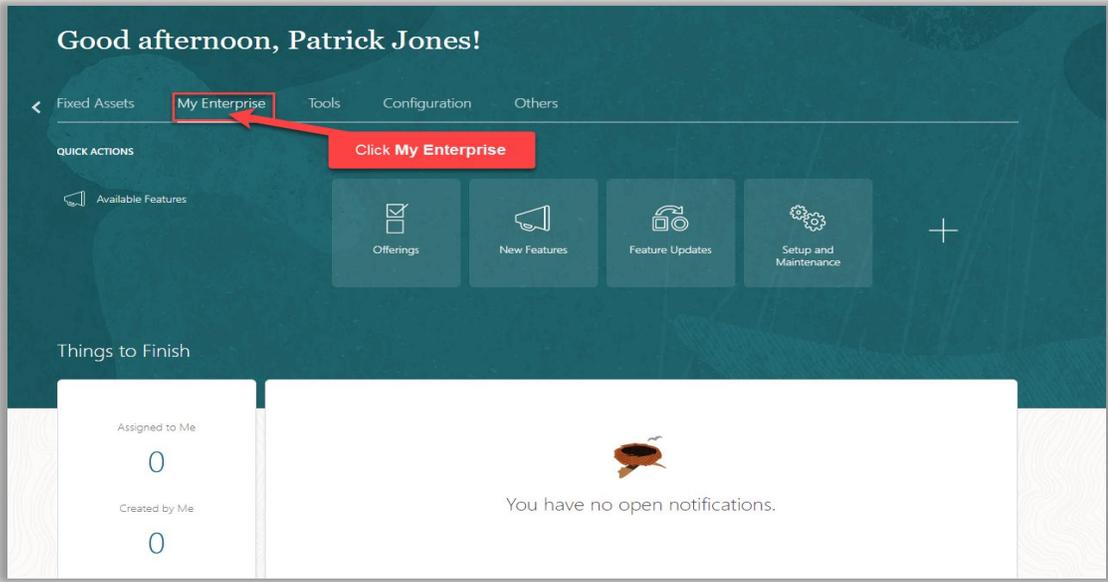
- Ceiling Rule: Include in matrix
- Ceiling Proration Rule: None
- Annual Accrual Limit Rule:
- Limit Proration Rule:
- Allow negative balance
- Negative Balance Limit:  Hours

Year End Processing

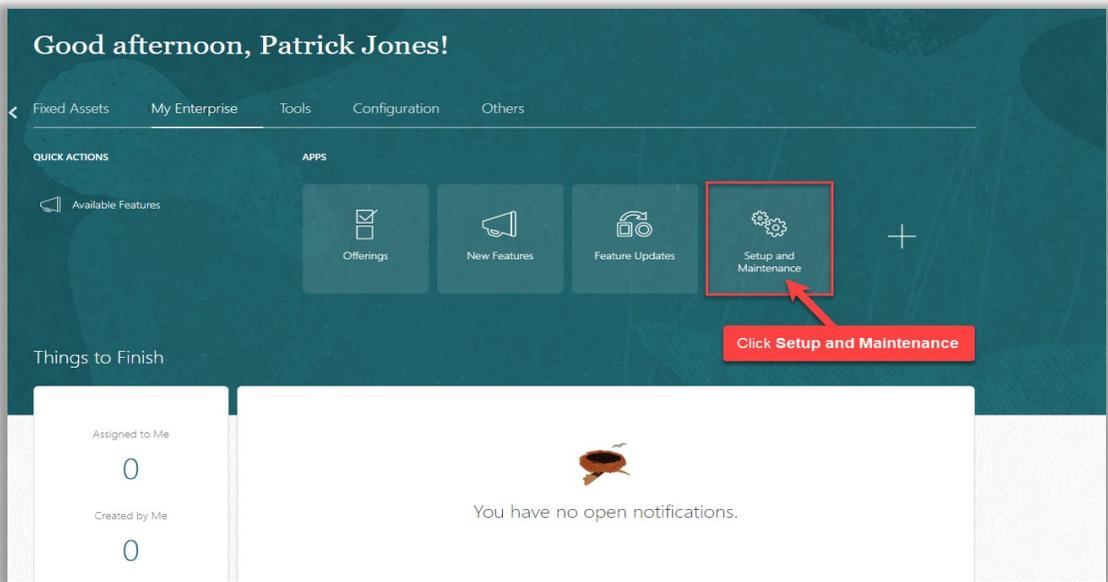
## Create A Calendar Event

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

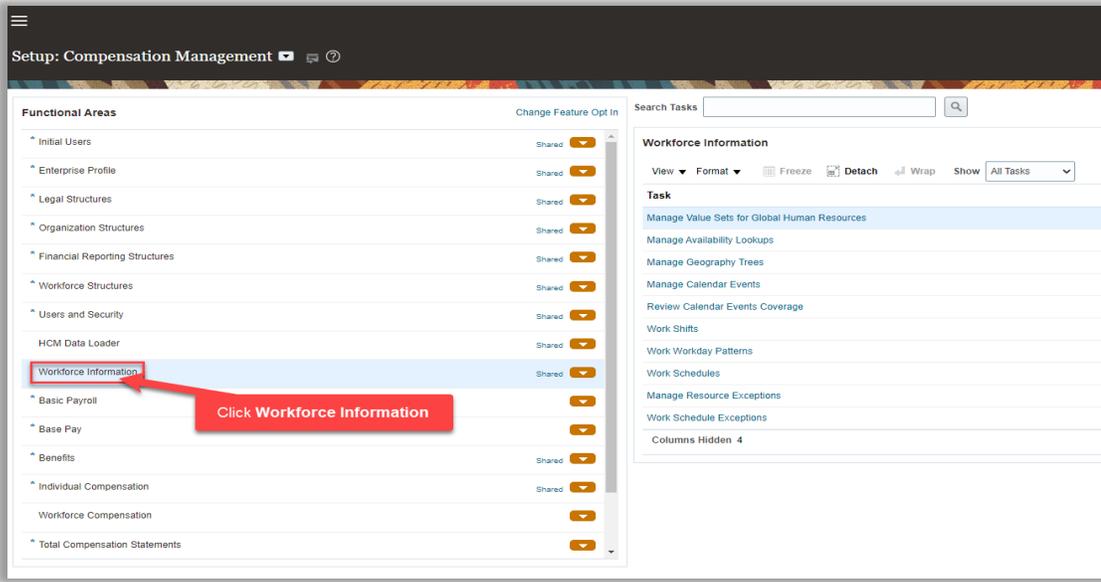
From the home screen, click **My Enterprise**



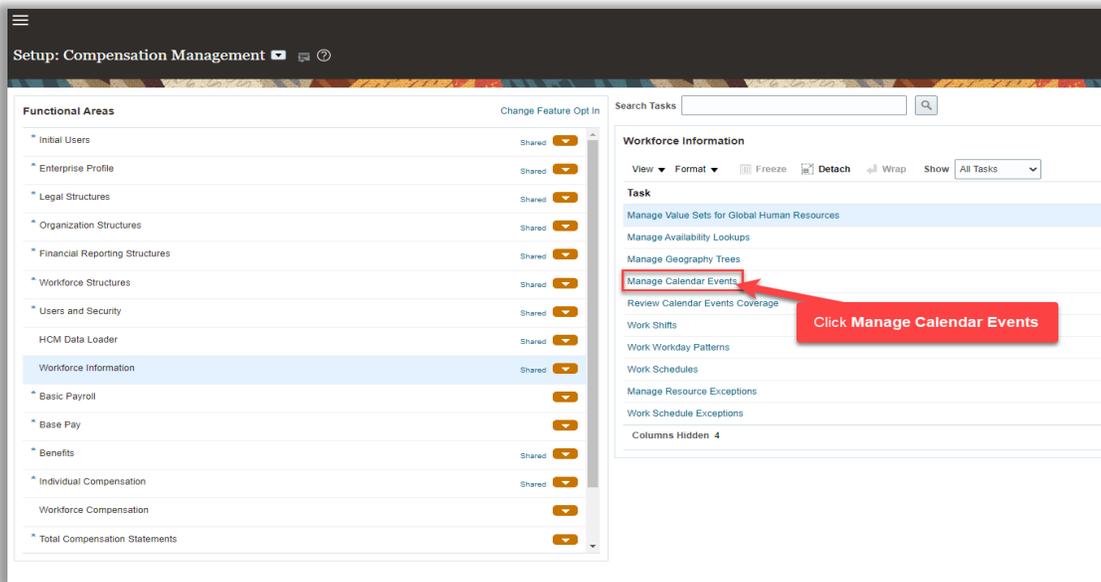
Click **Setup and Maintenance**



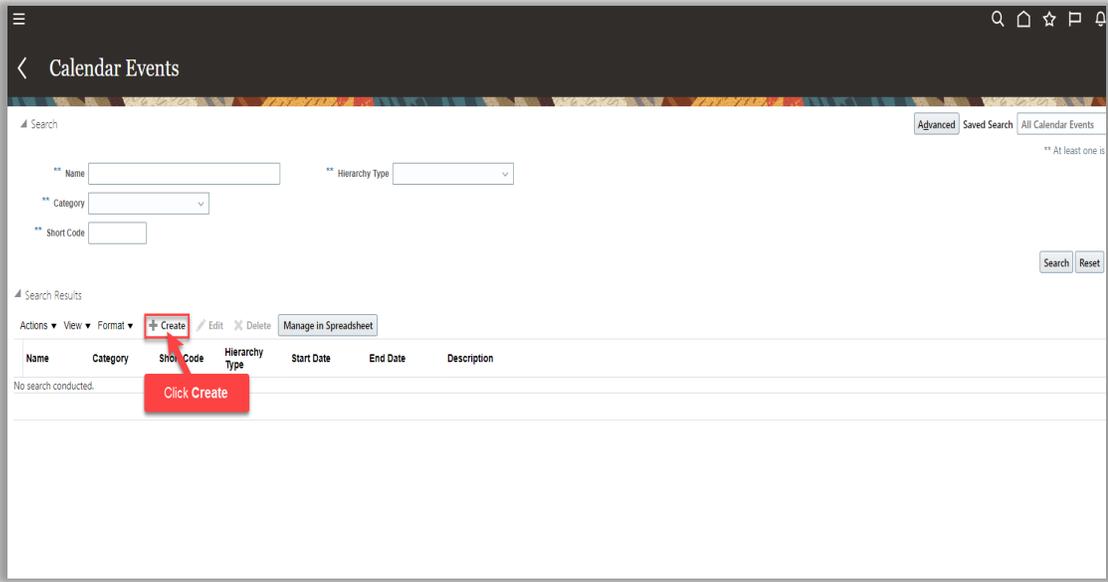
Click **Workforce Information** under **Functional Areas**



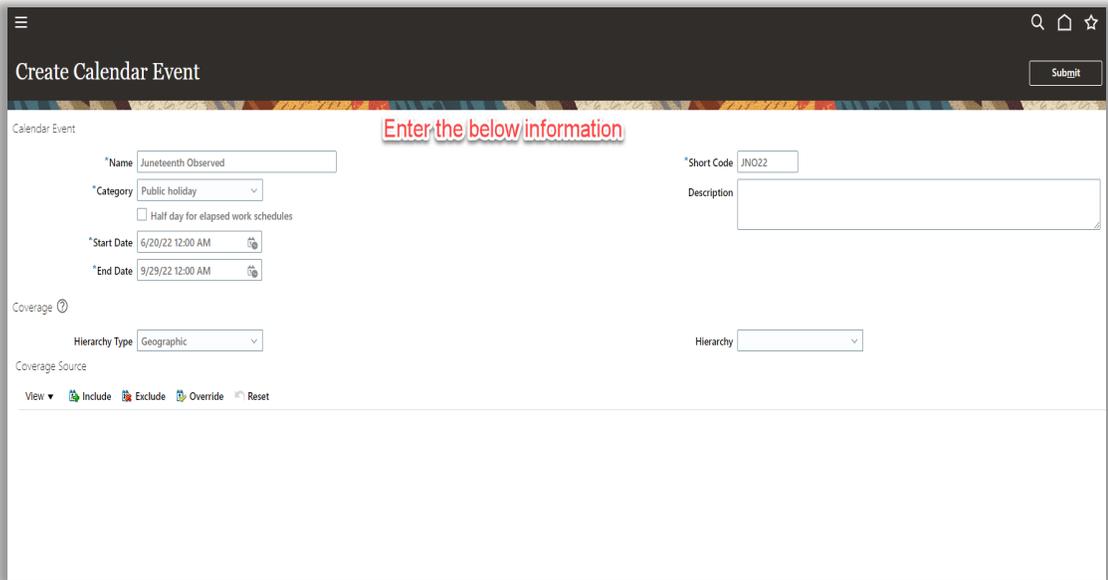
Click Manage Calendar Events



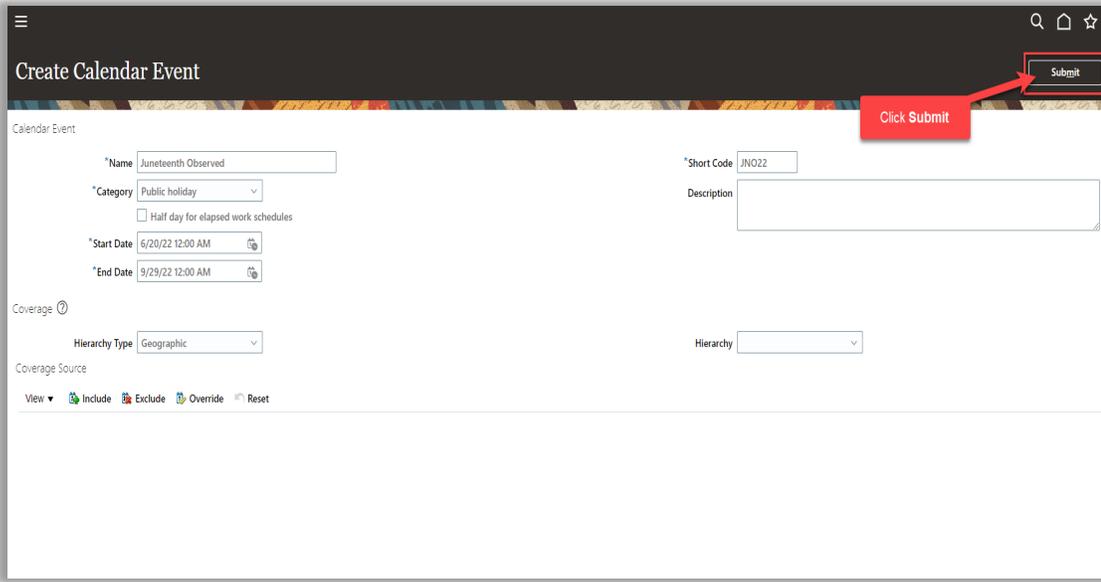
Click Create



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**



Click **Submit**

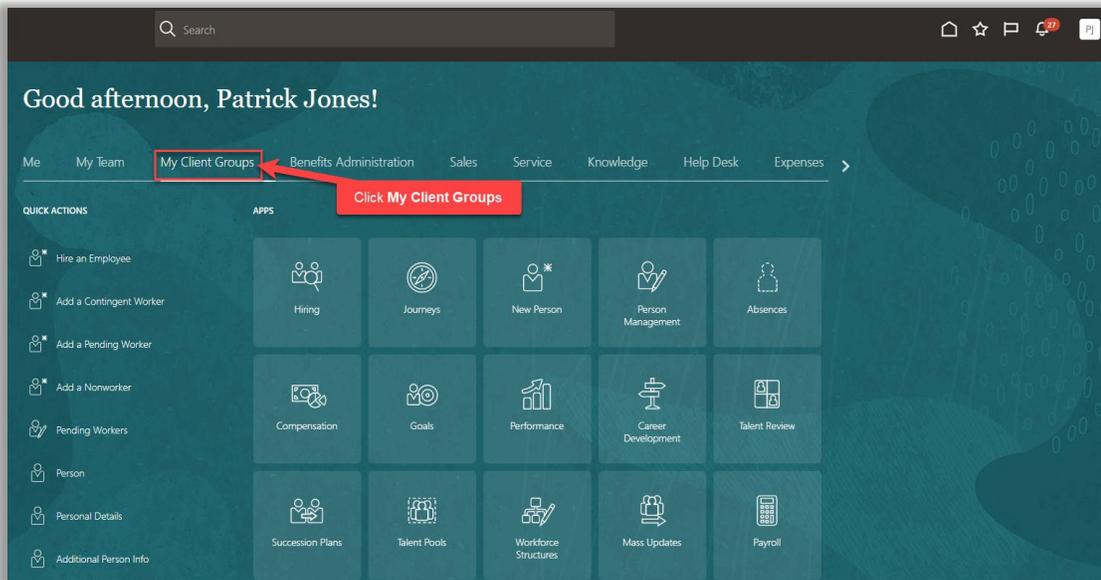


## Daily Absence Management

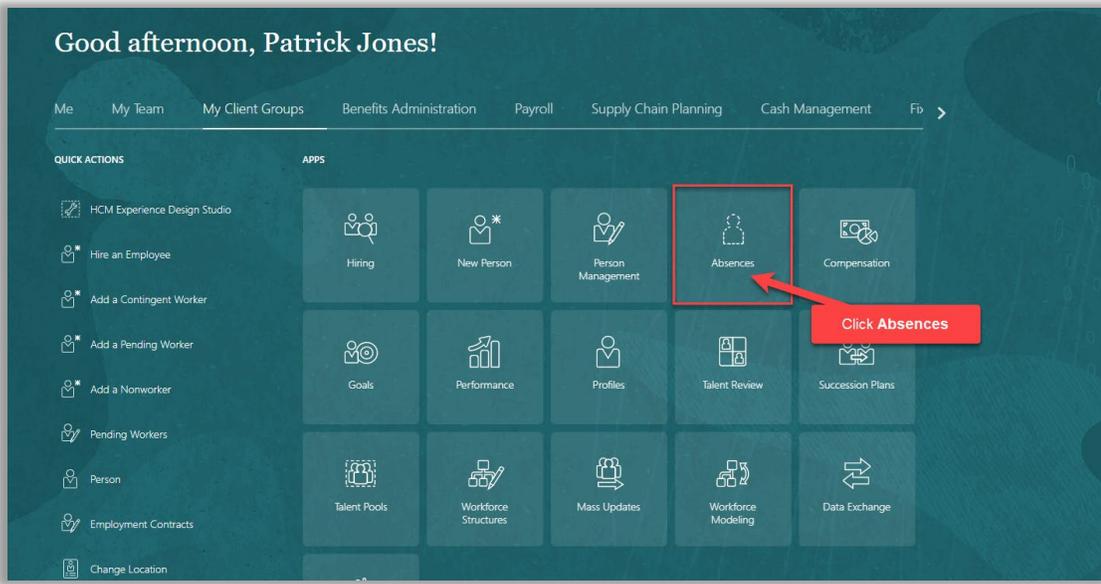
View Employee Absence Plans

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

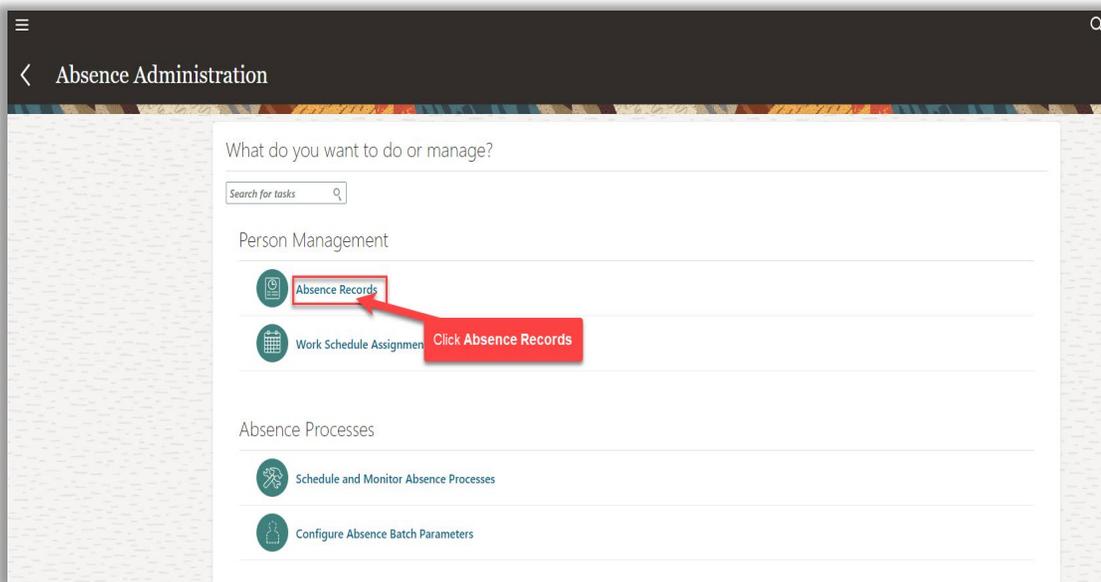
From the home screen, click **My Client Groups**



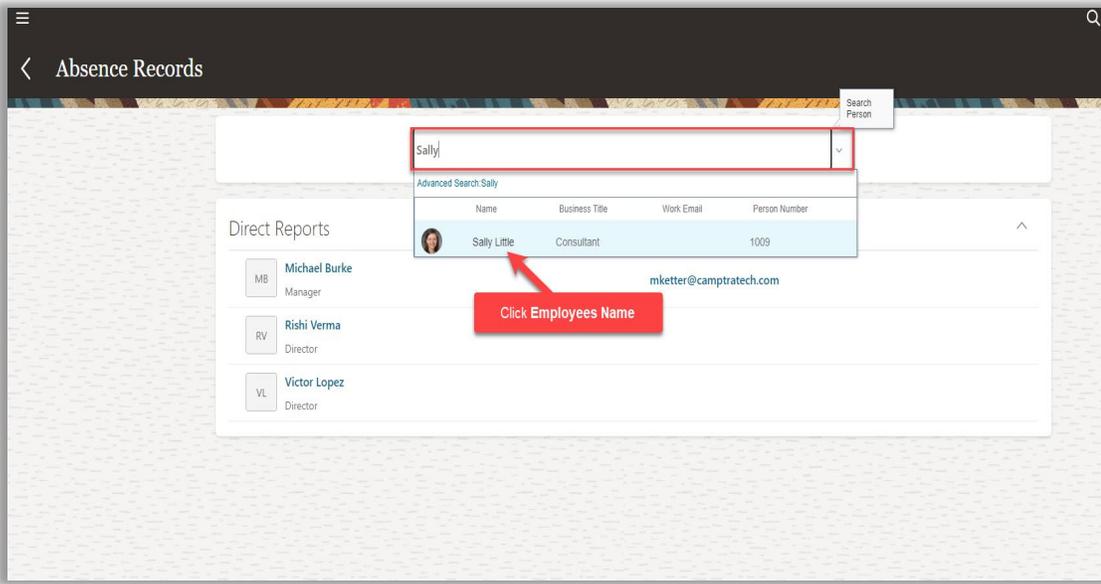
Next, click **Absences**



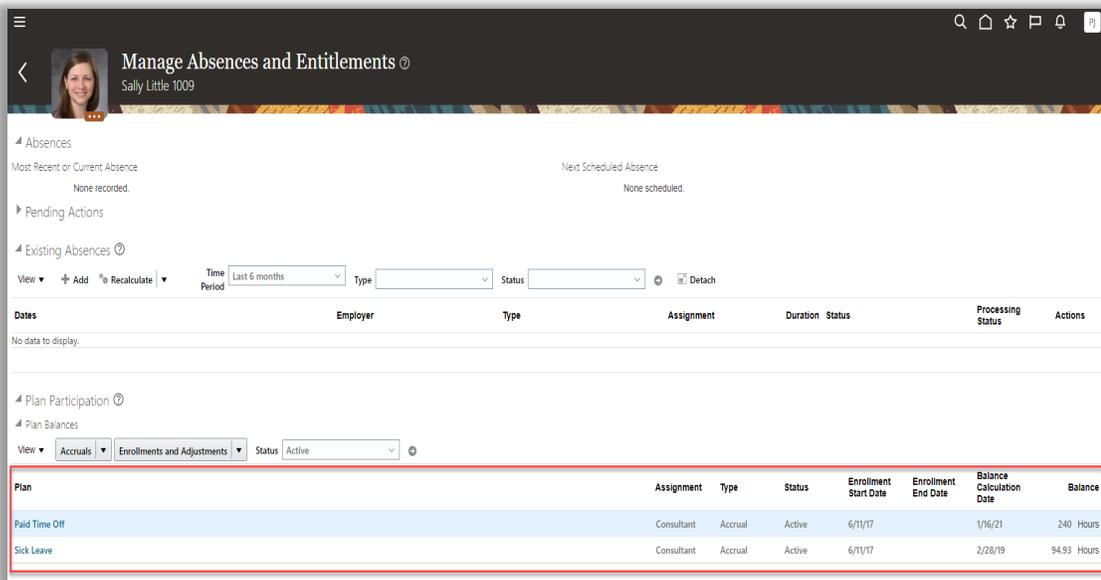
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



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



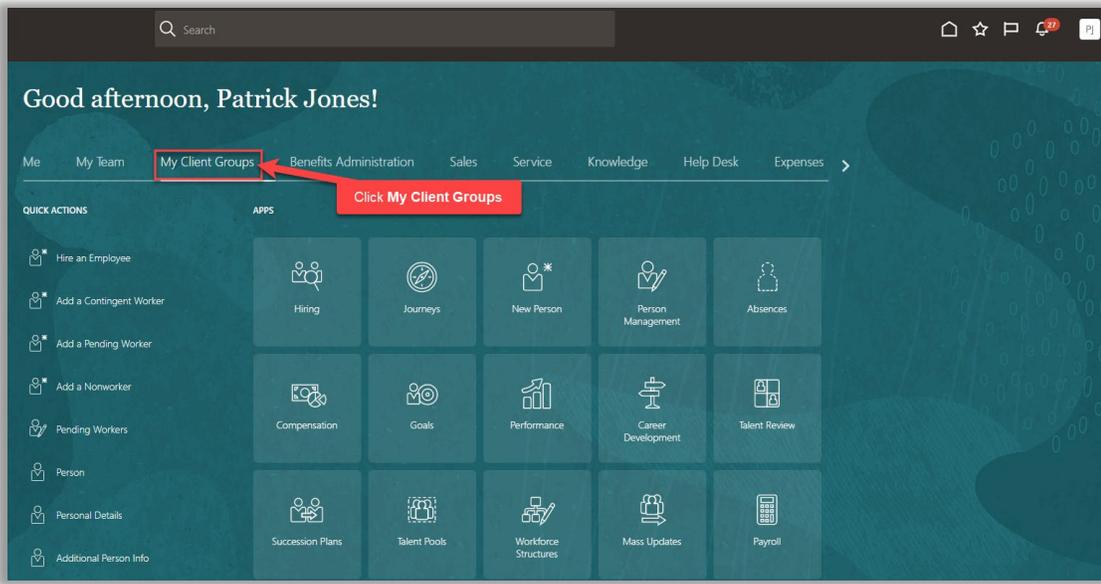
Under Plans, we can review the plans in which this employee is enrolled



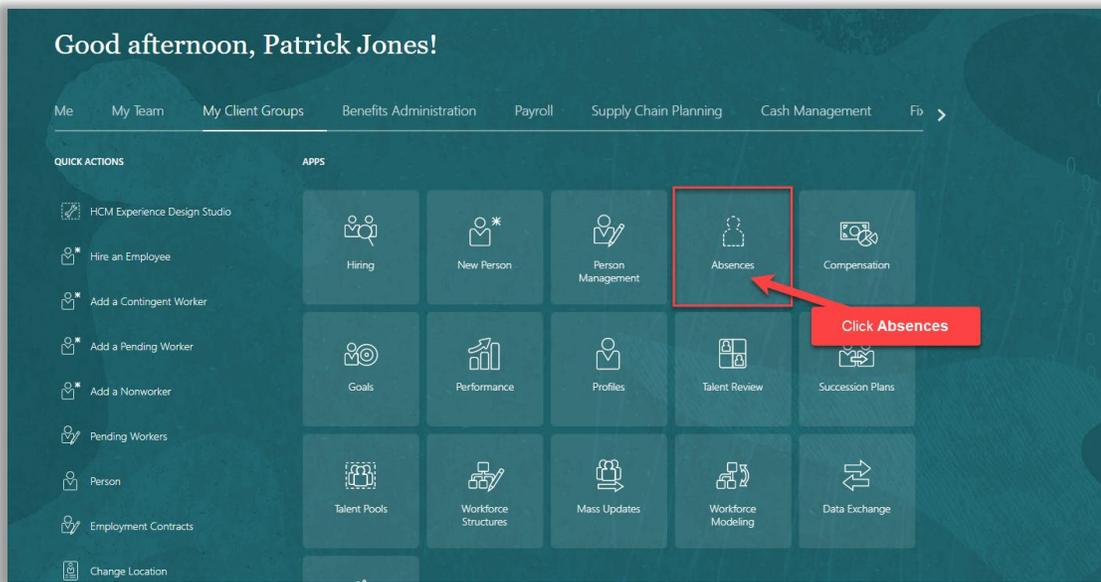
### Manually Enroll An Employee Into A Plan

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

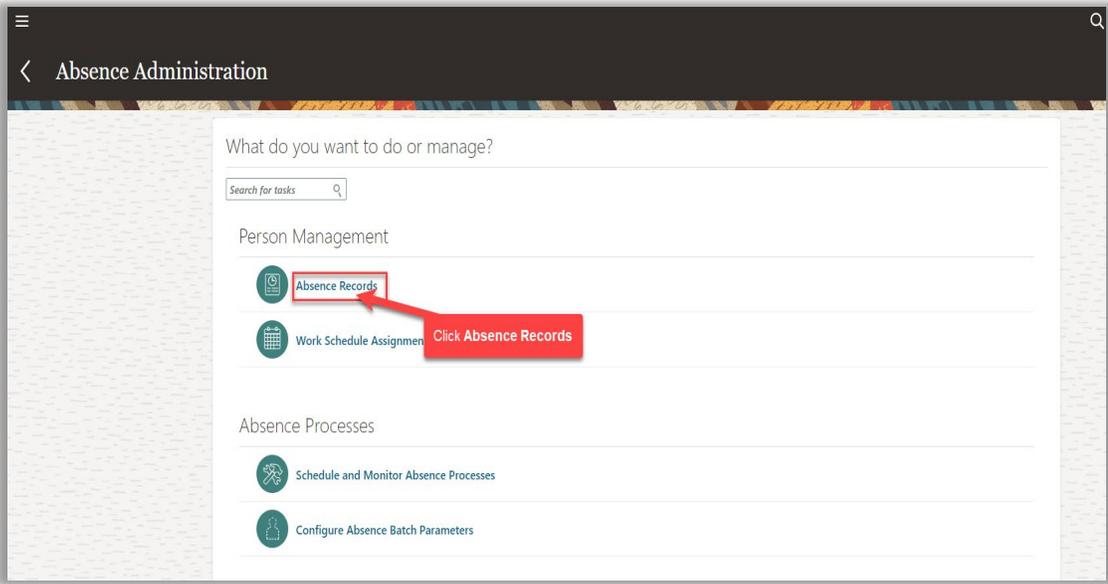
From the home screen, click **My Client Groups**



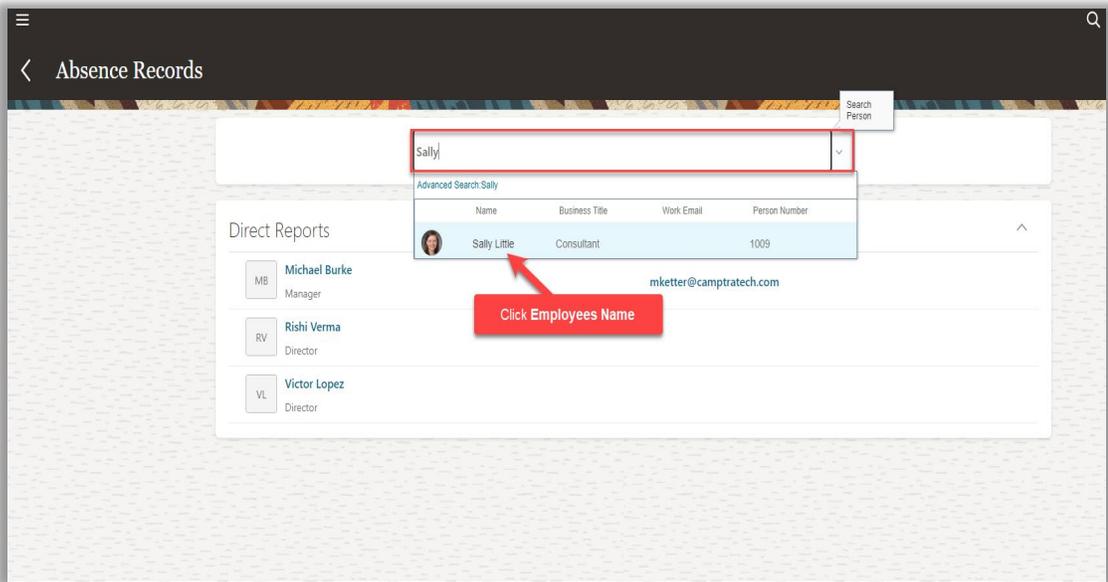
Next, click **Absences**



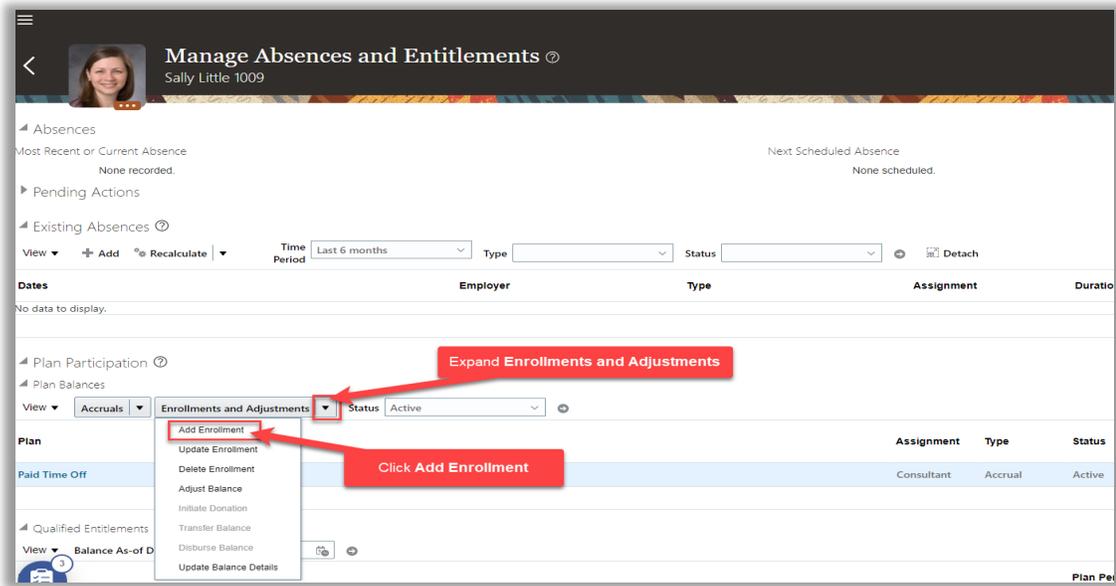
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



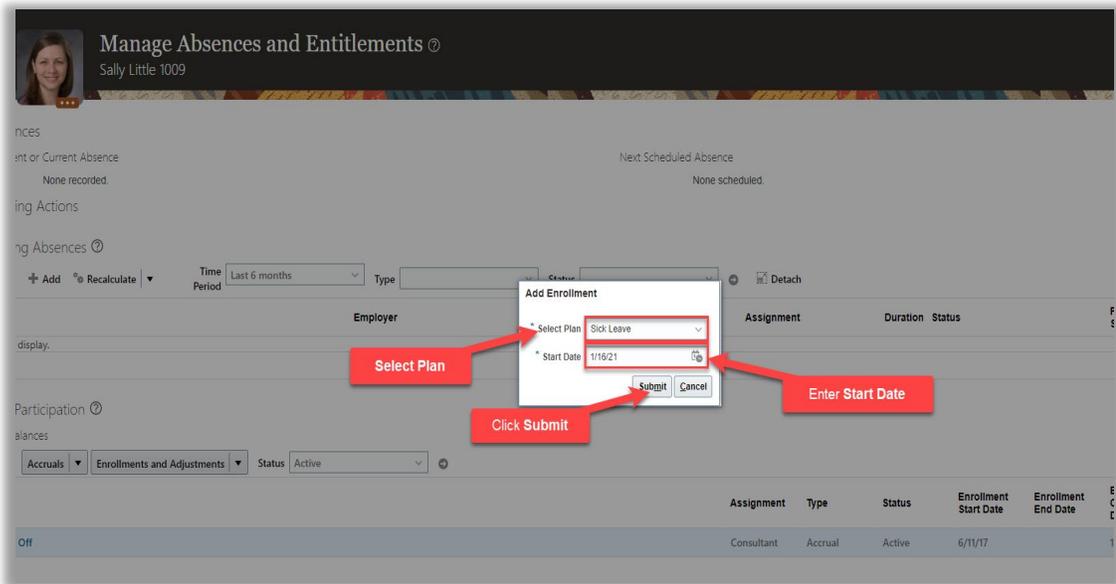
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



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**

None recorded. 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	Actions
No data to display.							

Plan Participation

Plan Balances

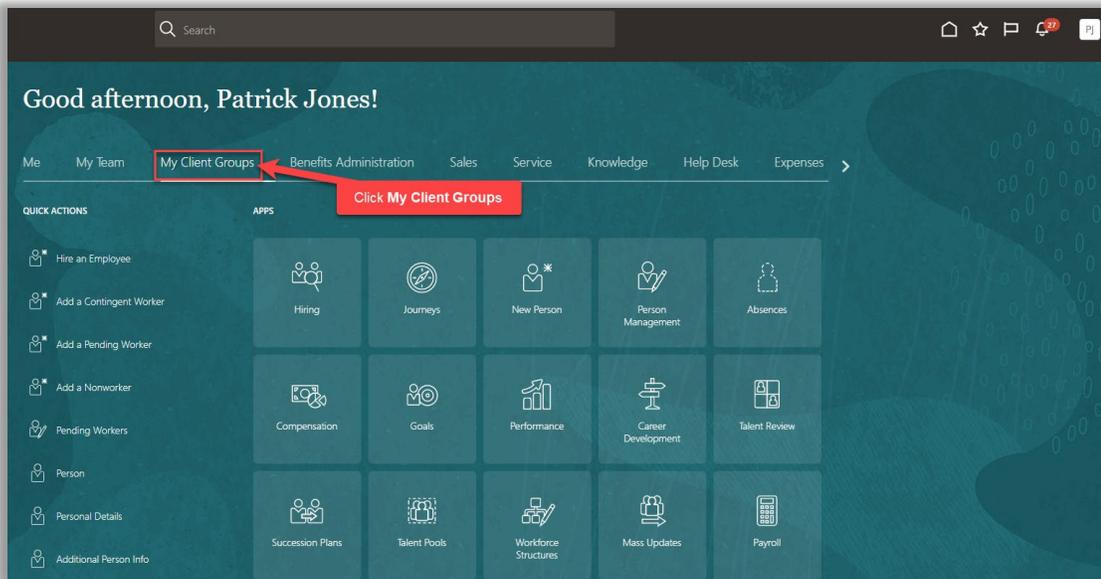
View Accruals Enrollments and Adjustments Status Active

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

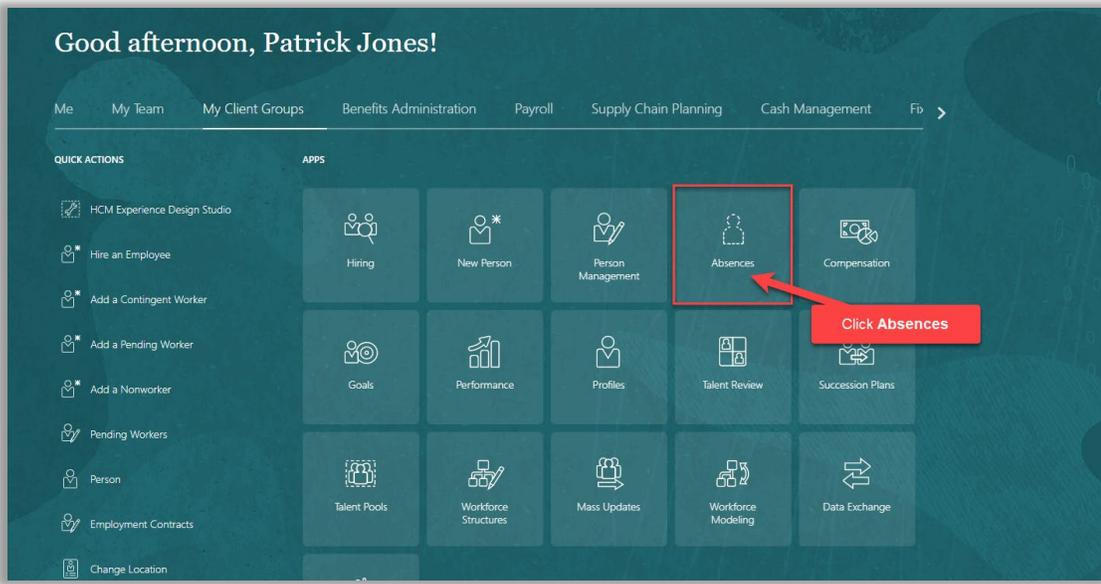
## Manually Adjust Plan Balance

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

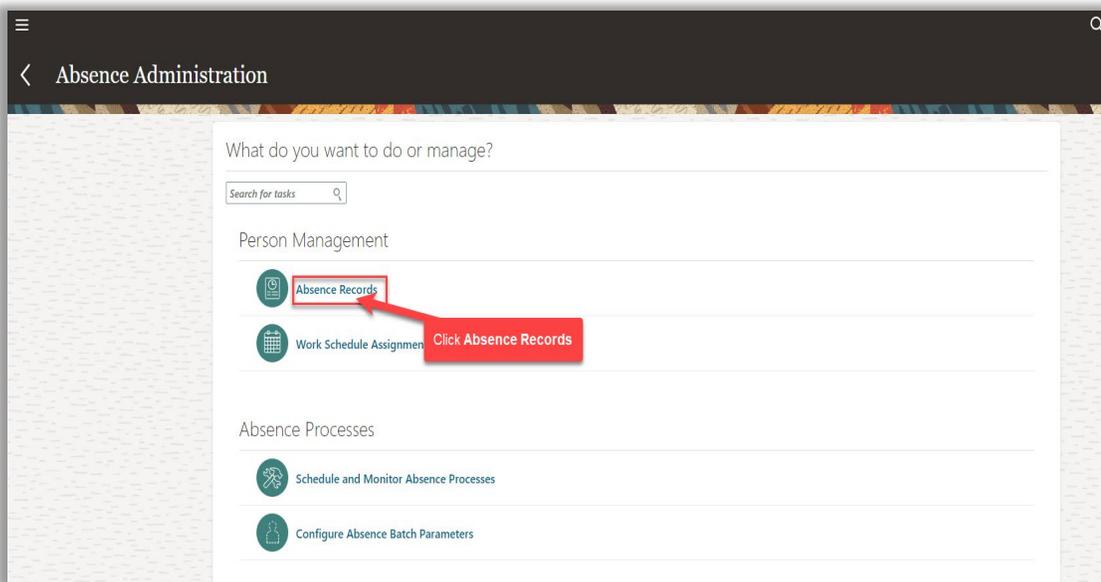
From the home screen, click **My Client Groups**



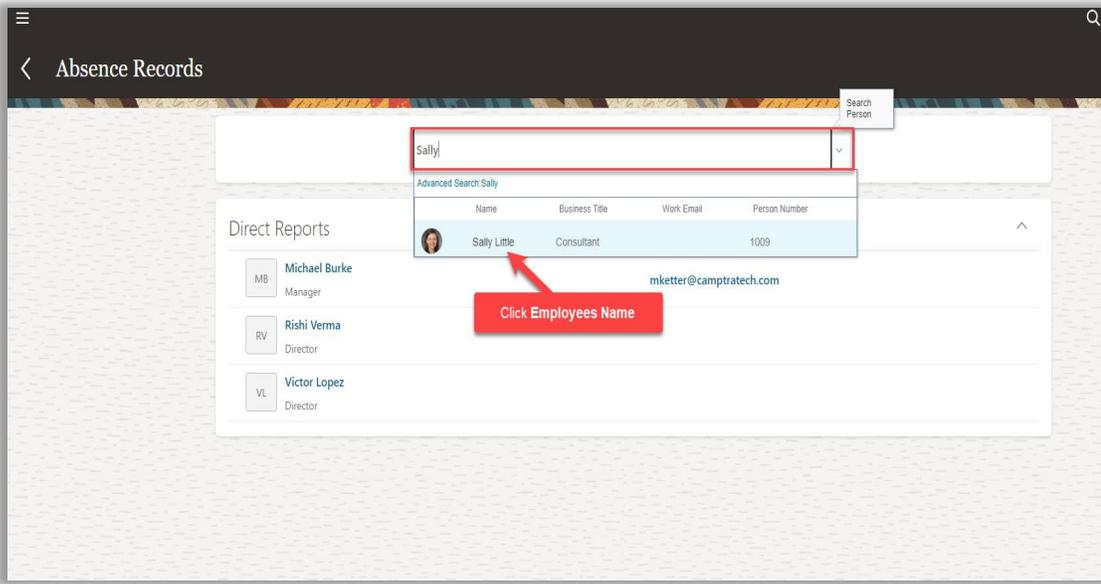
Next, click **Absences**



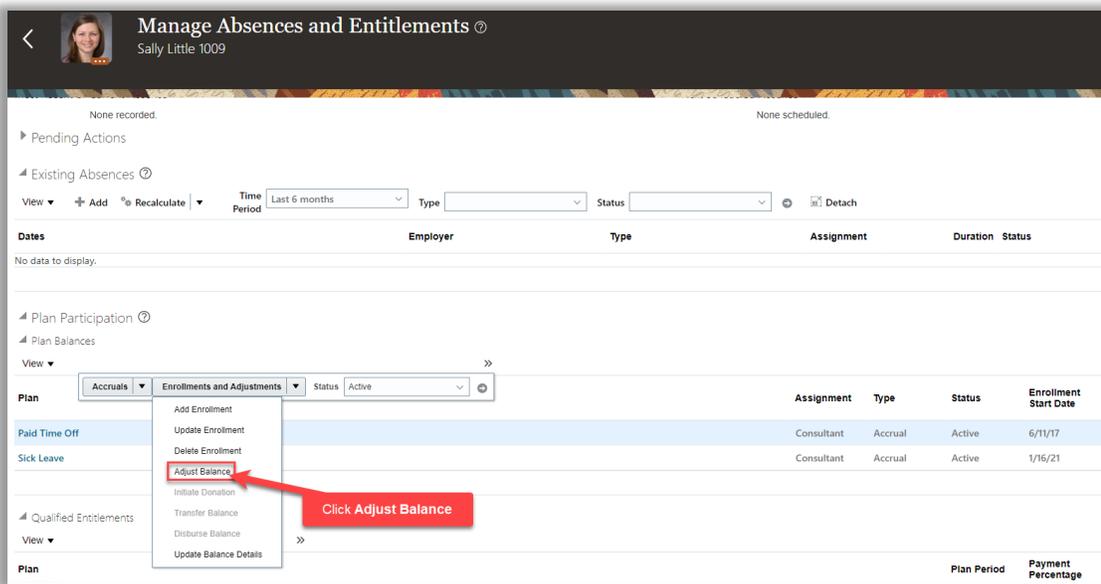
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



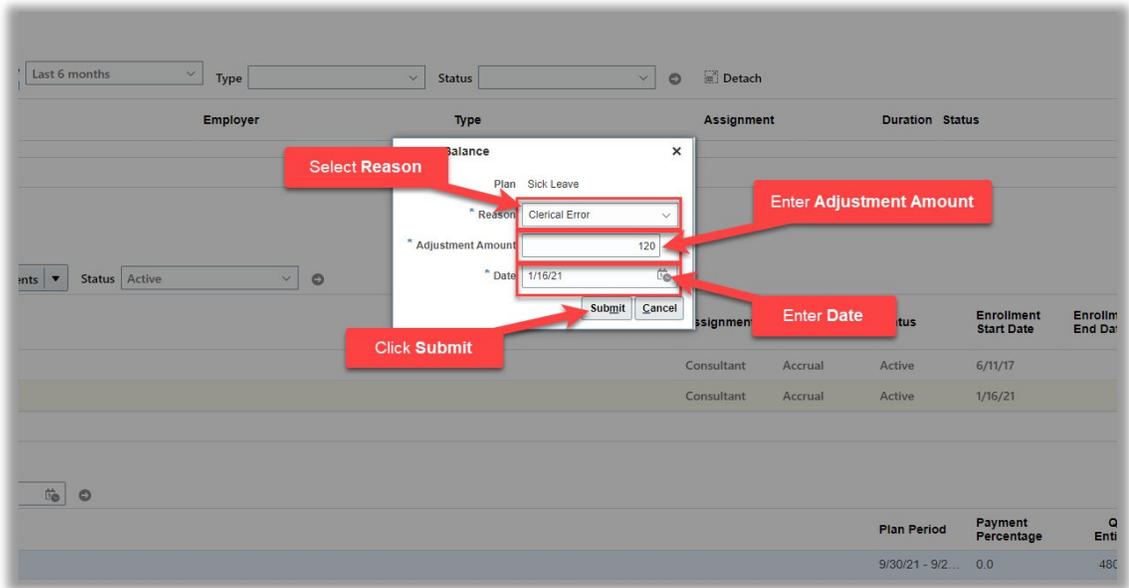
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



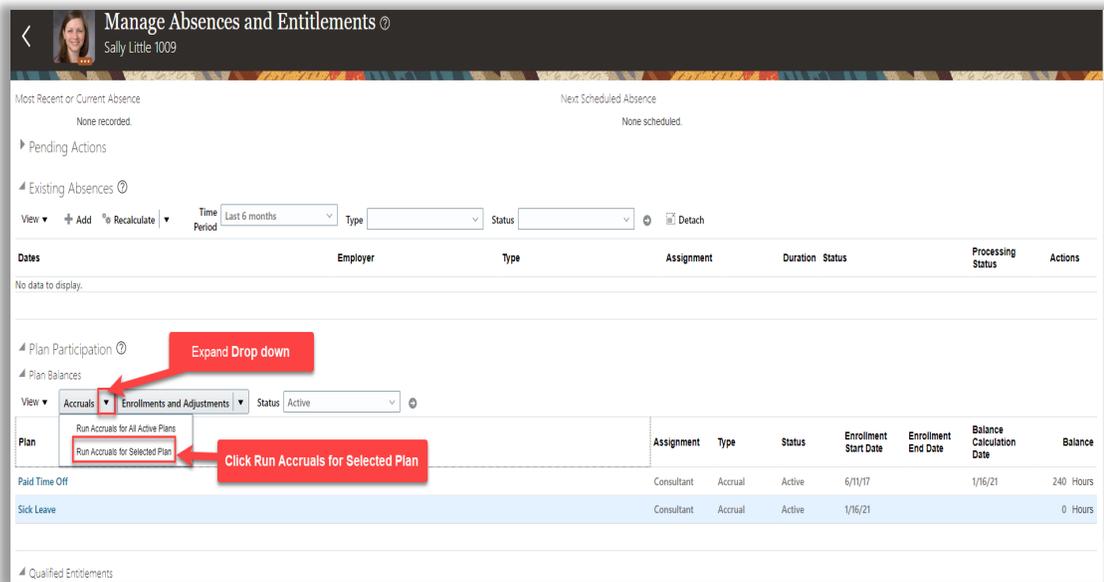
Under Plans, highlight the row of the plan and click **Enrollment and Adjustments** then, **Adjust Balance**



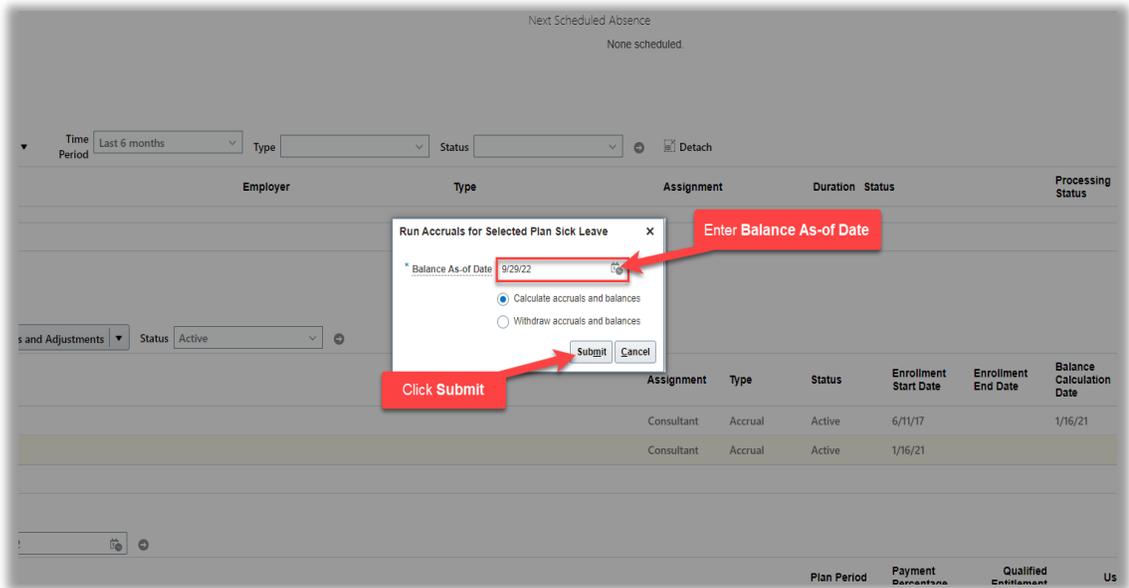
Select the **Reason**, enter the **Adjustment Amount**, and the **Date**. When entering the adjustment amount, to add to the balance, simply enter the amount. To remove from the balance, enter a negative entry. Click **Submit**



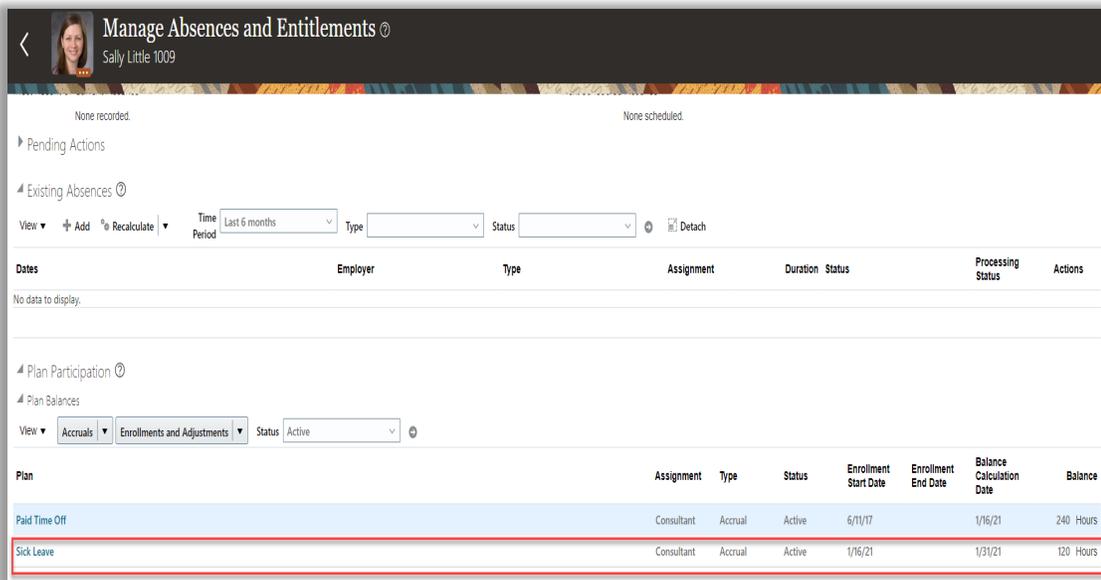
Next, to update the balance, we need to **Run Accruals for Selected Plan**. As a note, this process will only update the balance for one pay period; if you need to update the balance for multiple pay periods, follow the **Calculate Accruals & Balance Process**. Highlight the row of the plan and click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



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



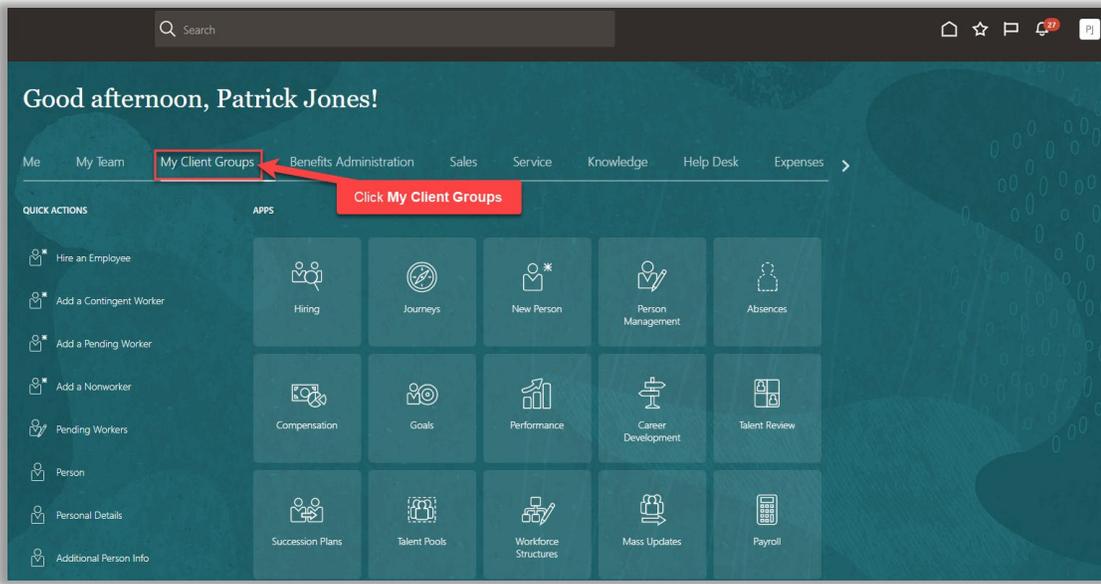
The **Plan Balance** has been updated



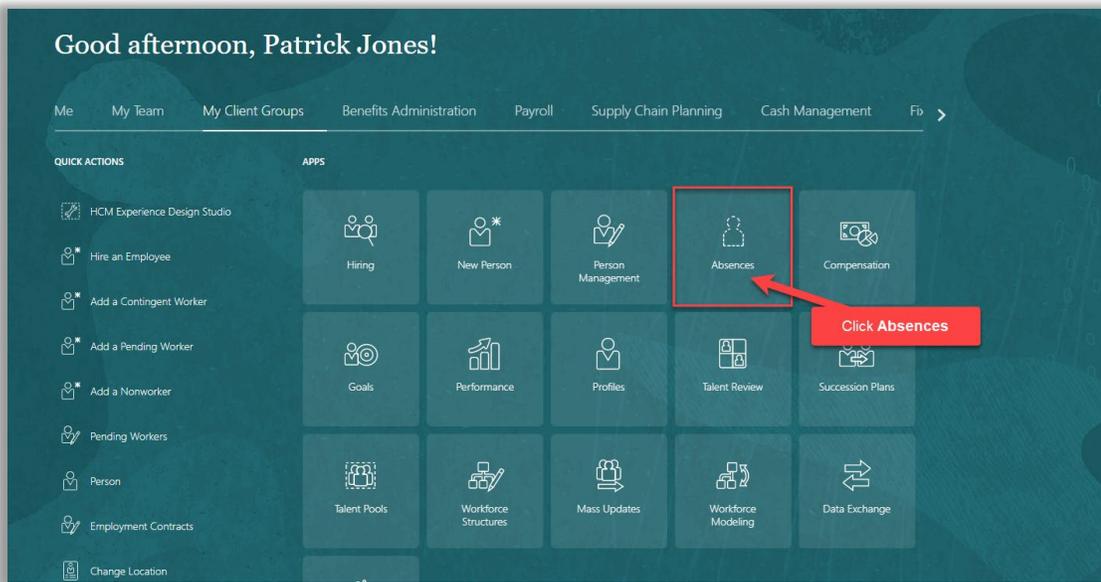
### Update Balance Details

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

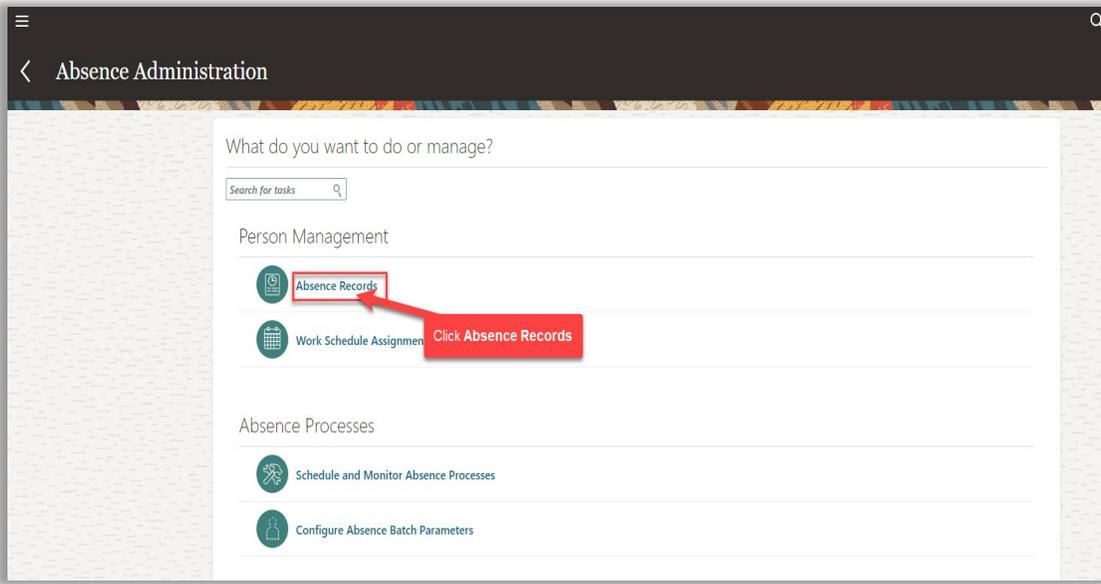
From the home screen, click **My Client Groups**



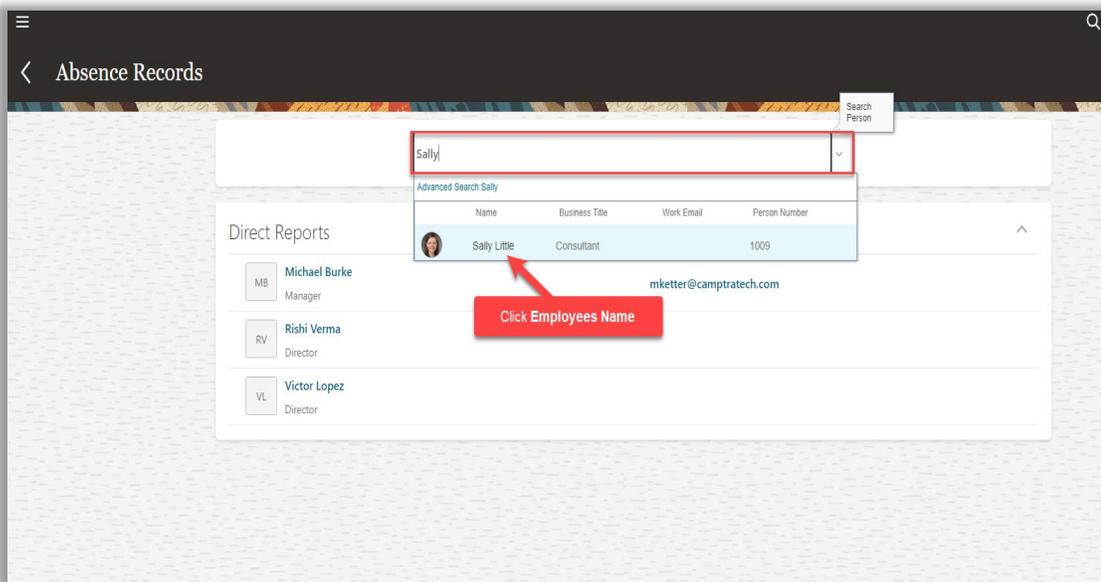
Next, click **Absences**



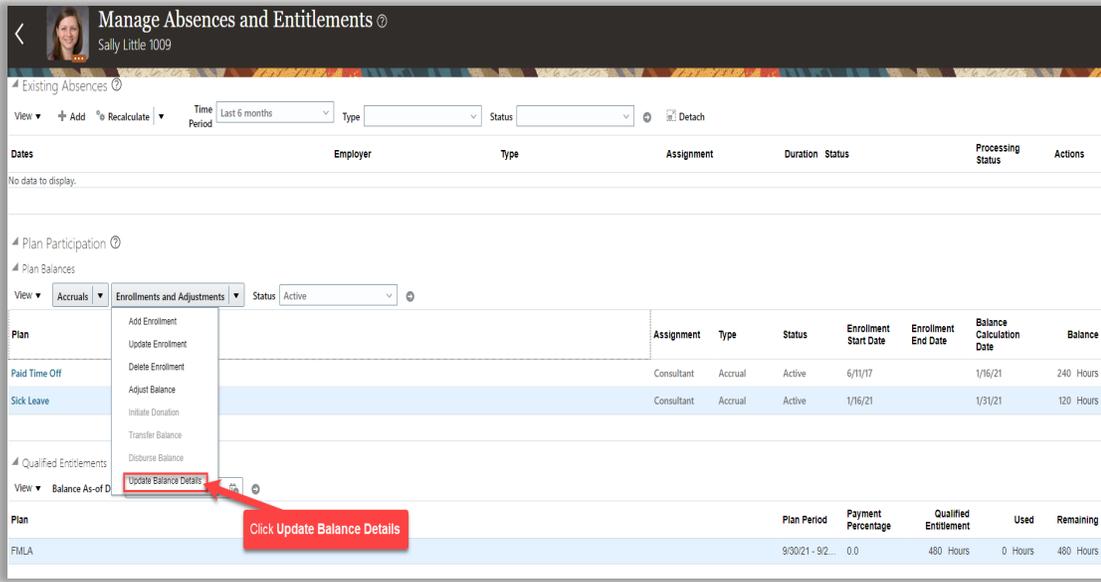
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



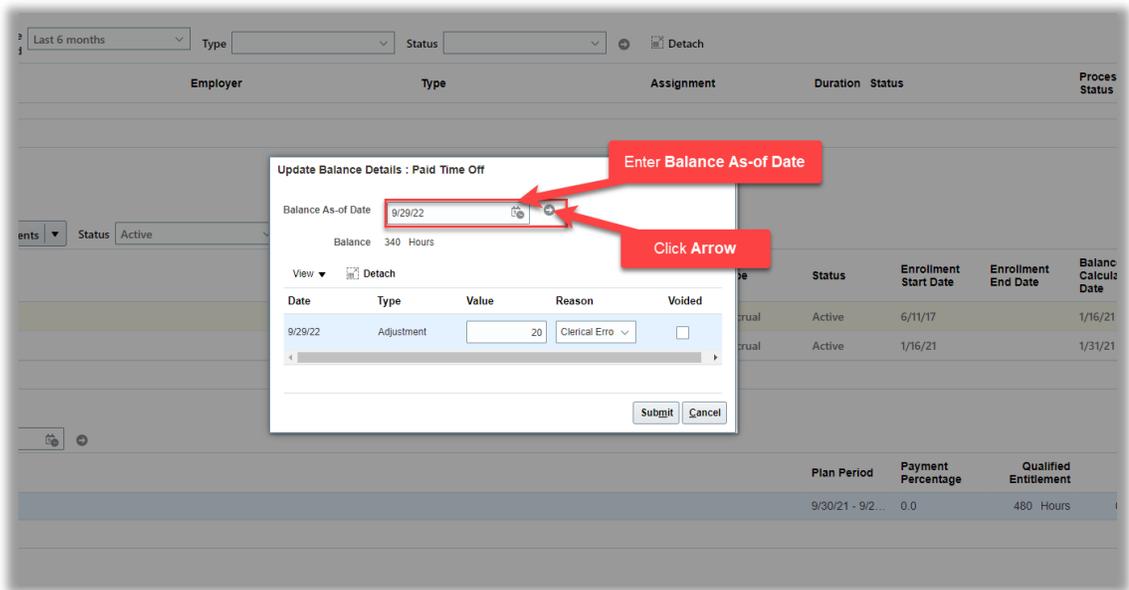
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



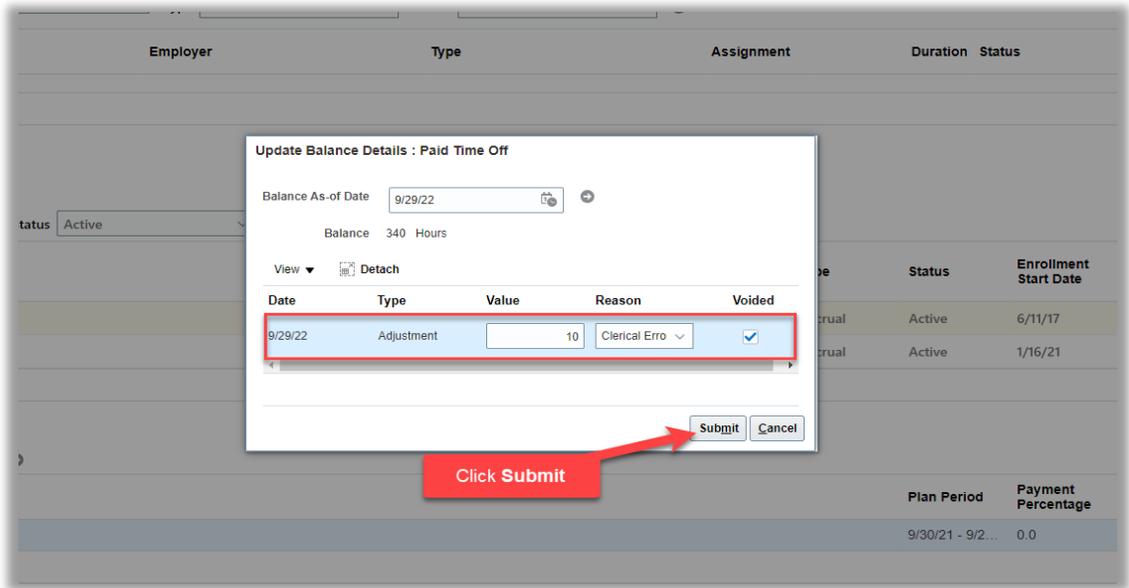
Under Plans, highlight the row of the plan and click **Enrollment and Adjustments** then, **Update Balance Details**



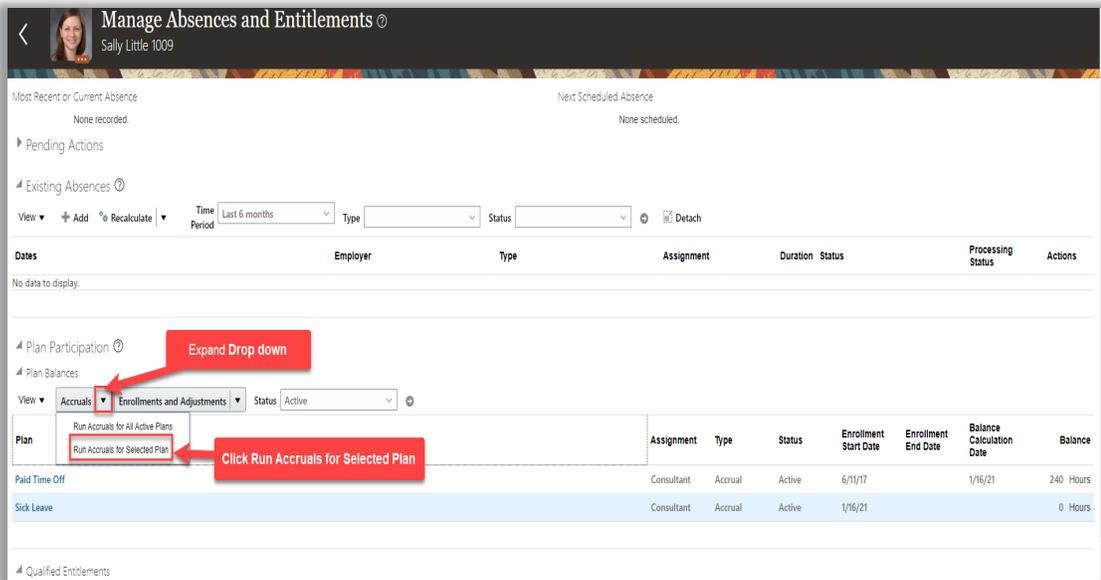
Enter the **Balance As-of Date** and click the **Arrow** to populate the **Balance Details**



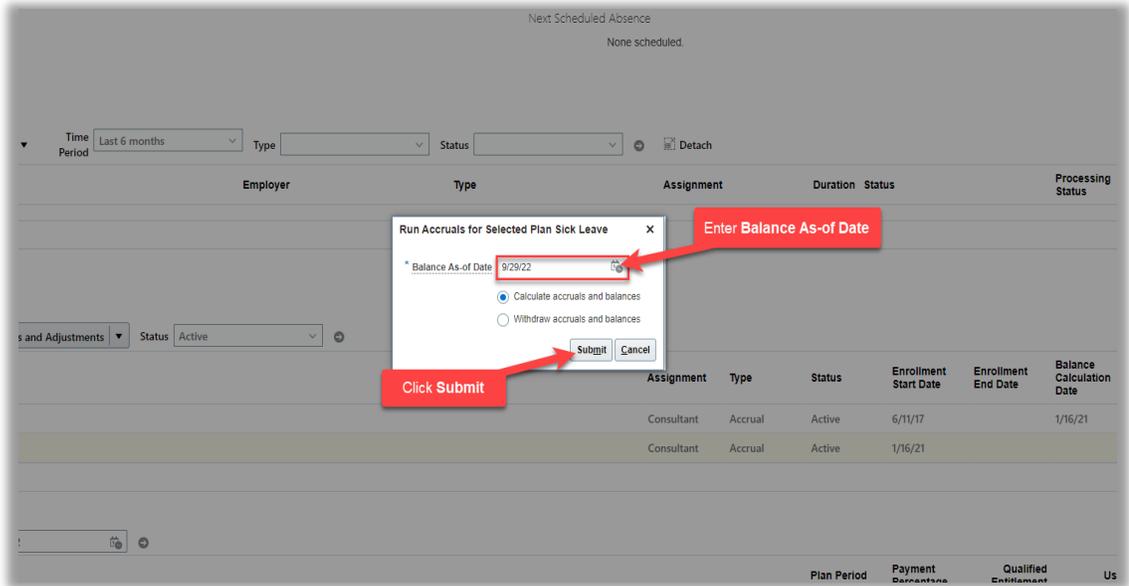
We can update the **Value**, **Reason**, or **Void** the entry. Click **Submit**



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**



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

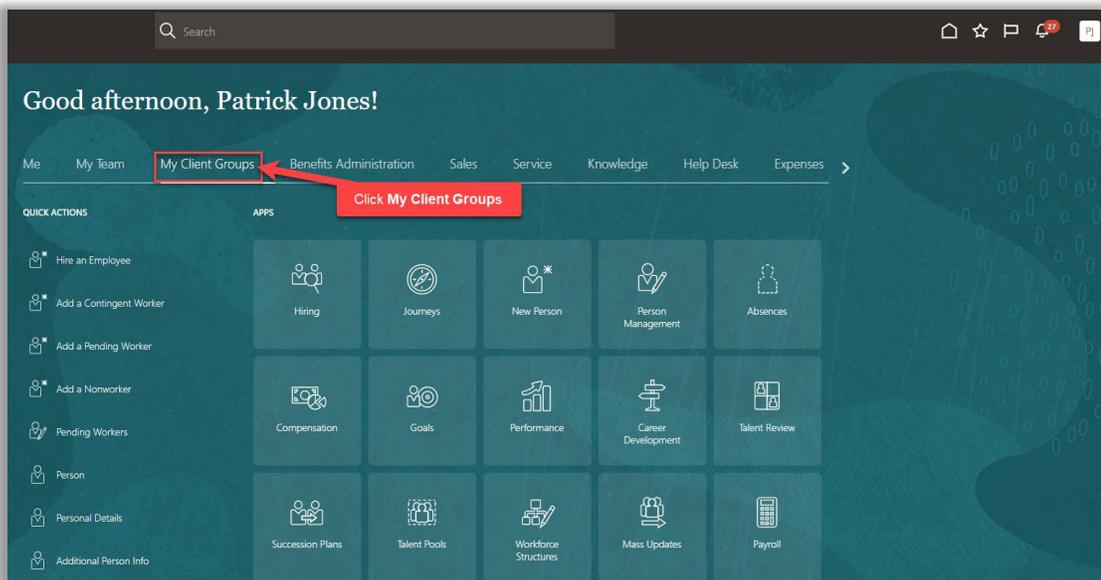


The **Plan Balance** has been updated.

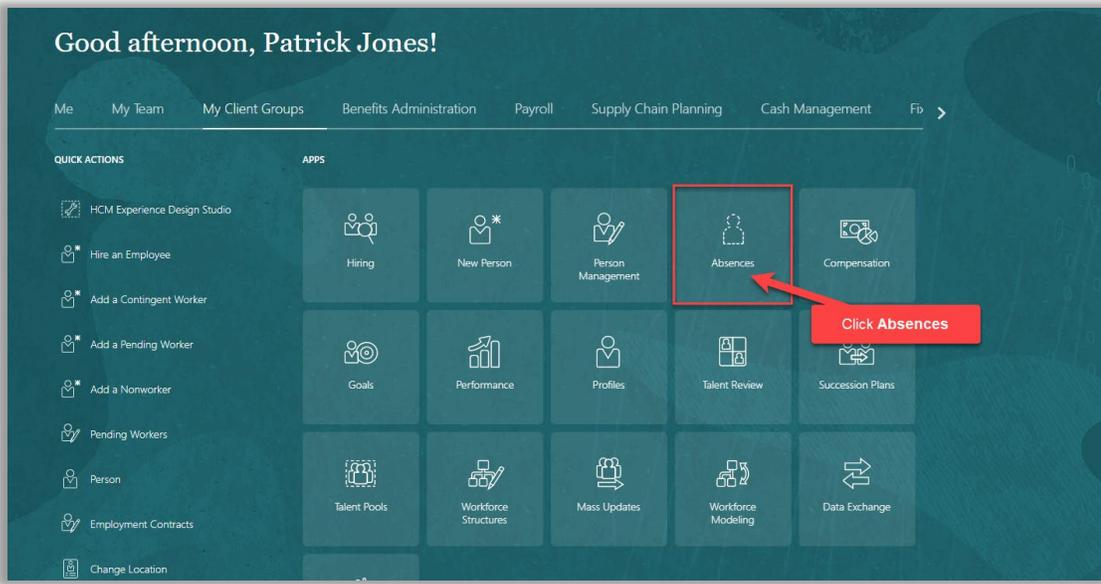
### View Current & Projected Leave Balance

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

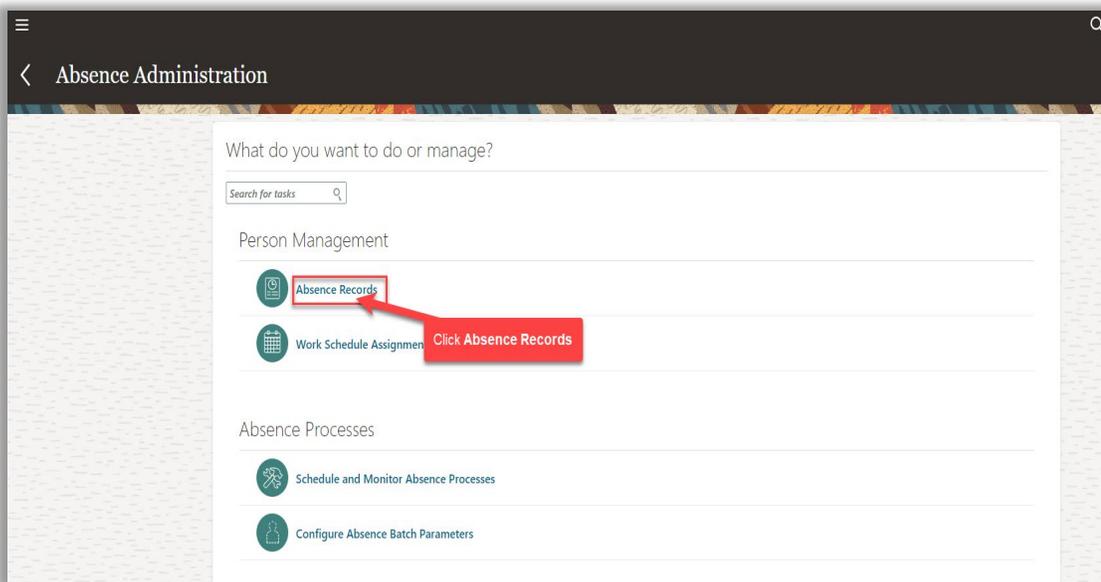
From the home screen, click **My Client Groups**



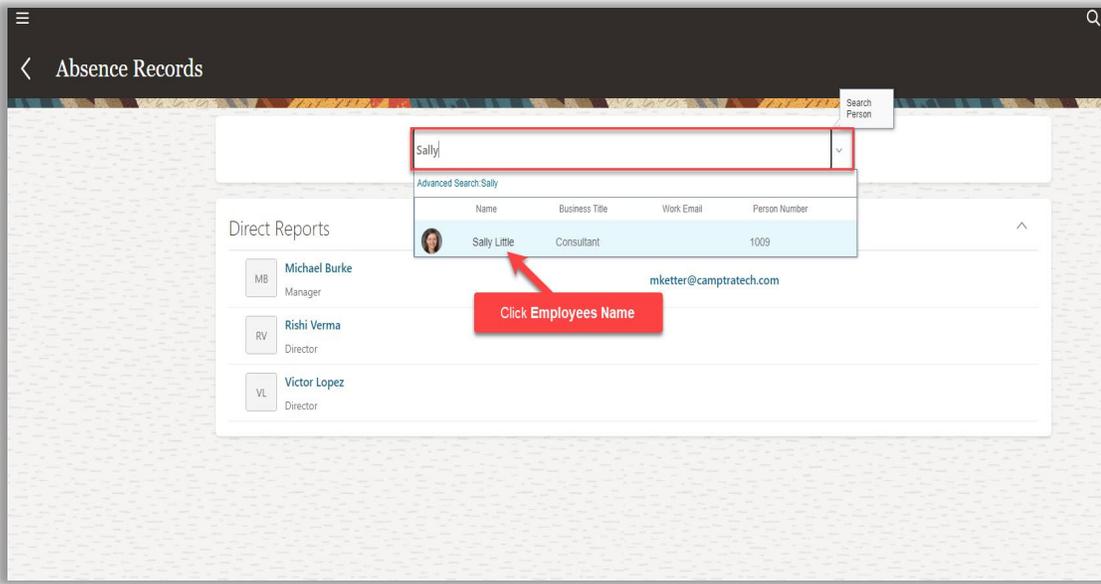
Next, click **Absences**



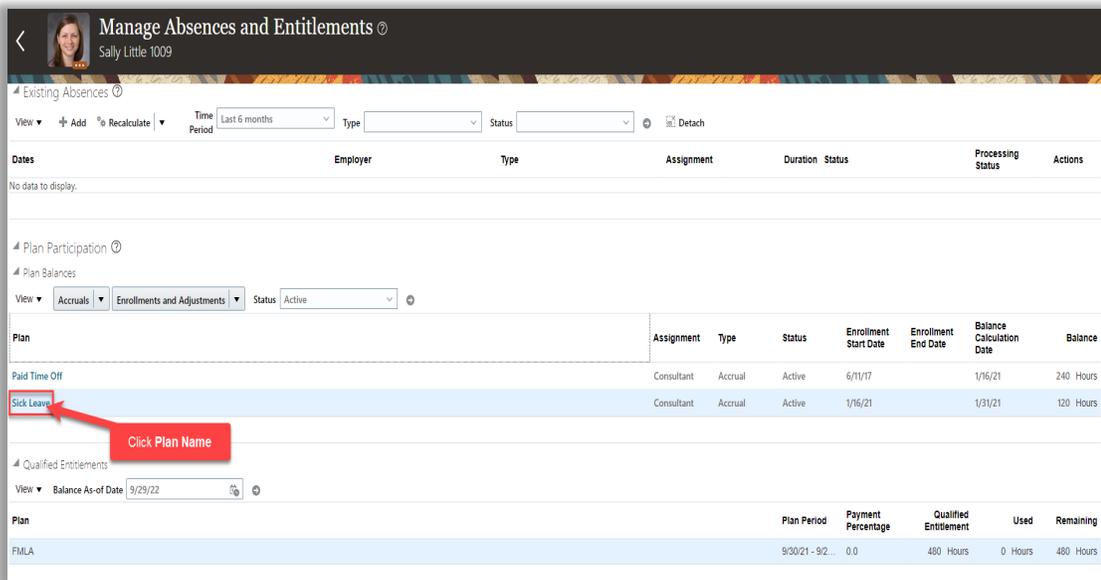
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



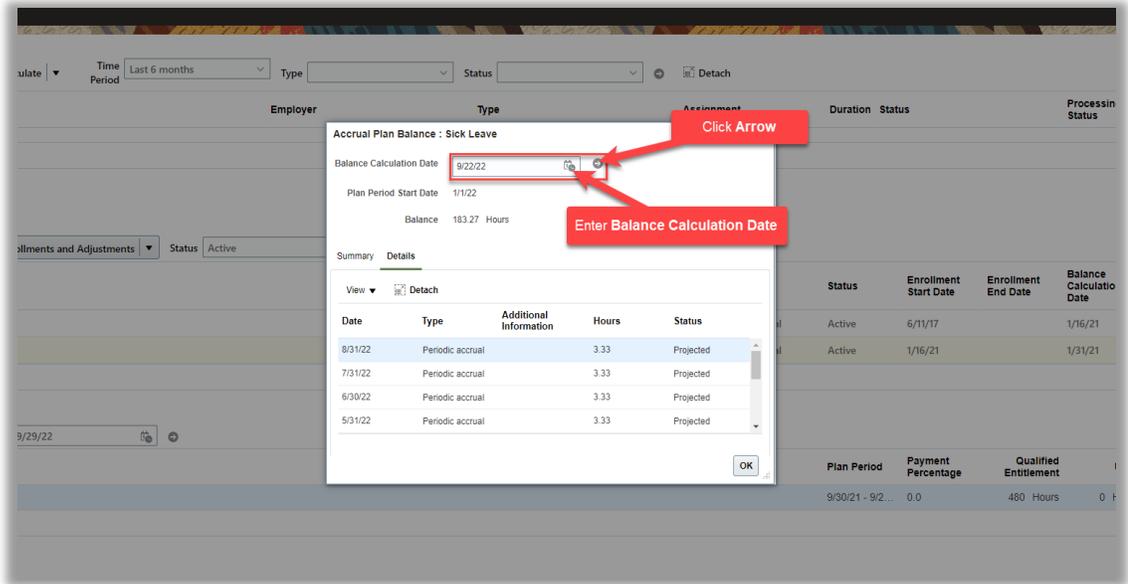
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



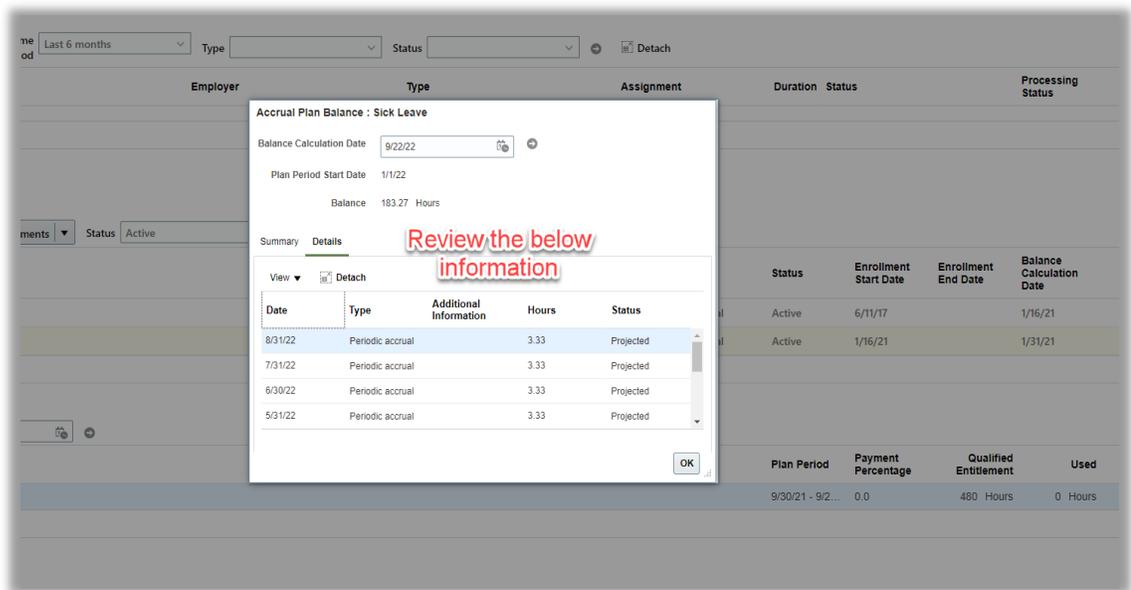
Under Plans, click the **Plan Name**



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



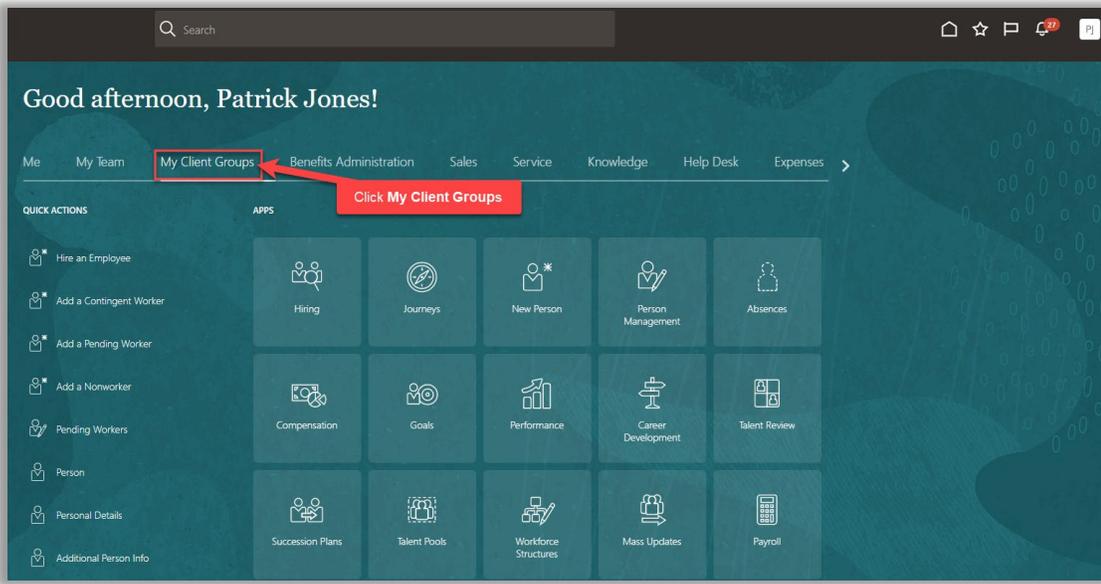
Scroll down to view the **Plan Details**. We can review the **Balance** as of the **Balance Calculation Date**. Projected, under the Status column, represents a projected accrual. We can also view the accrual rates under the **Hours** column as well as the **Date** in which the accrual is applied



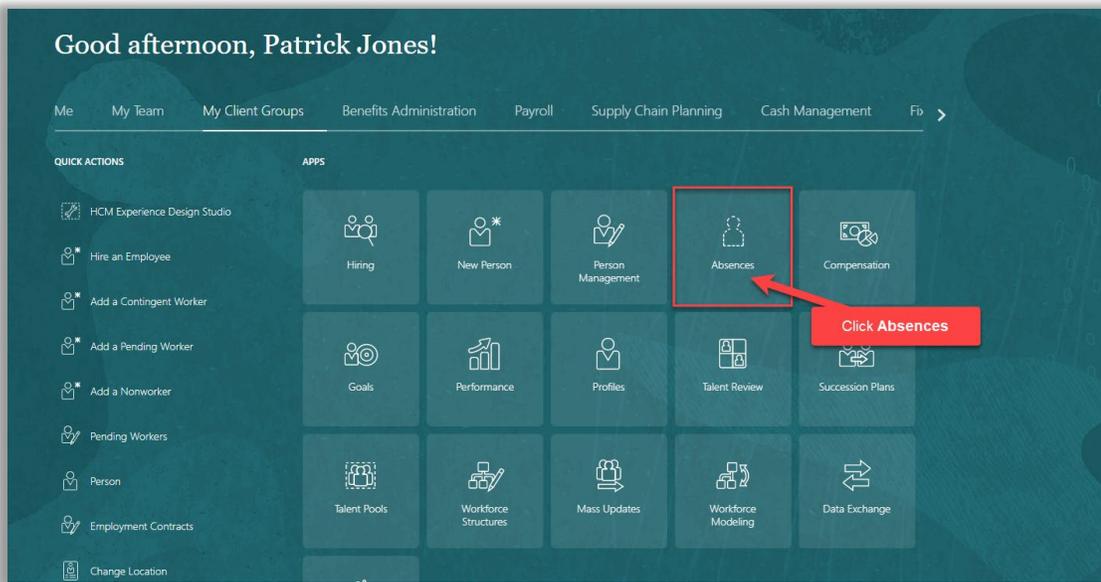
### Update Absence Plan Enrollment Date

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

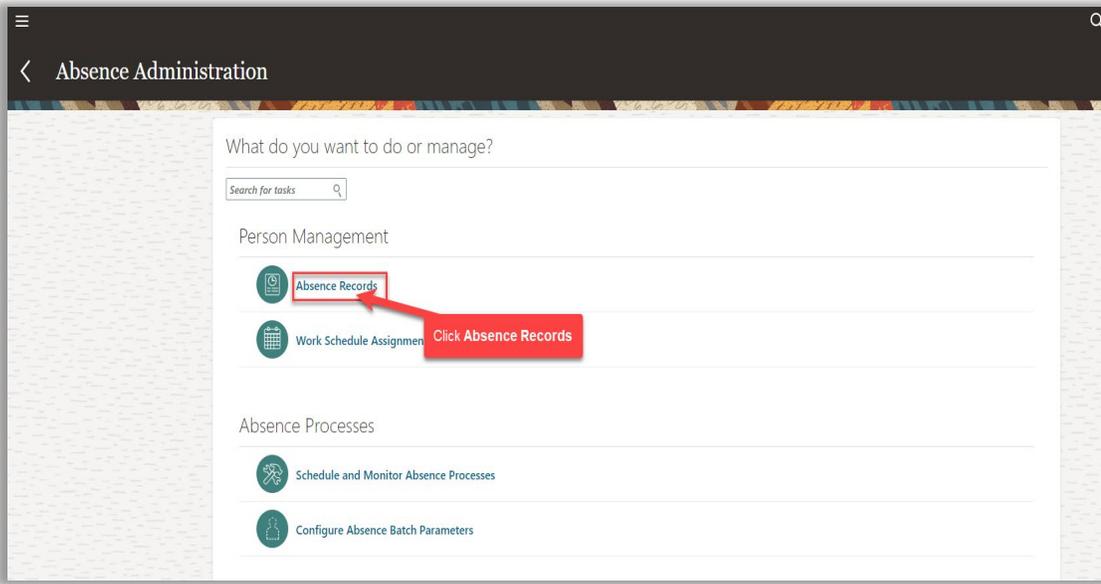
From the home screen, click **My Client Groups**



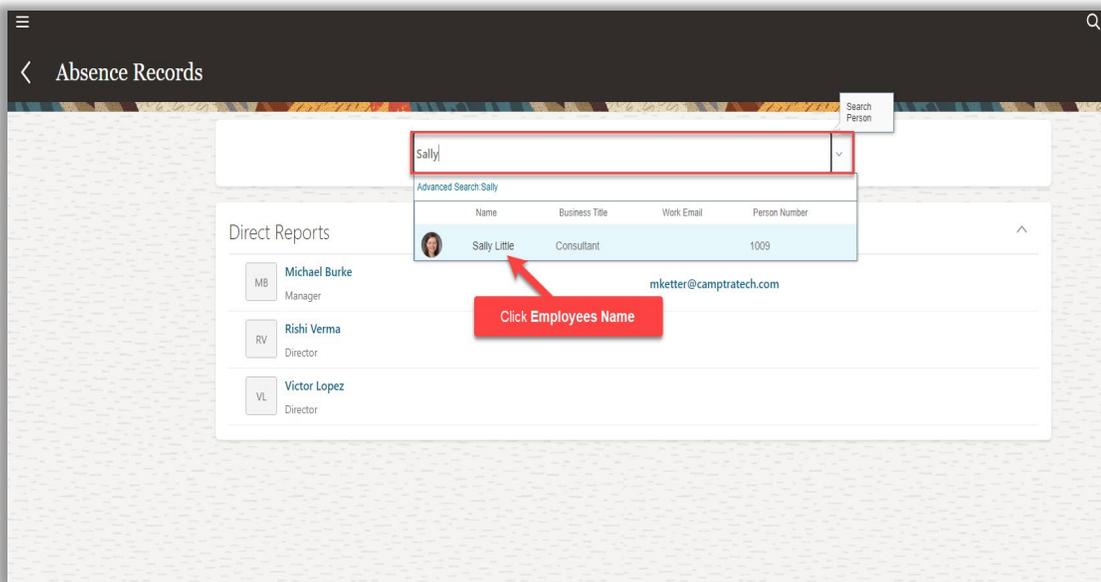
Next, click **Absences**



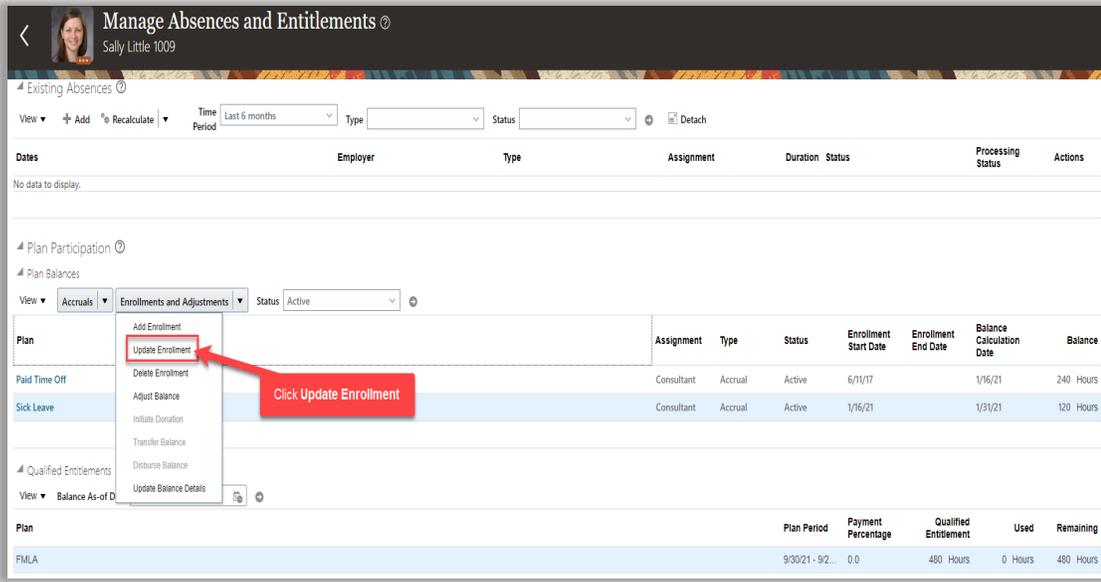
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



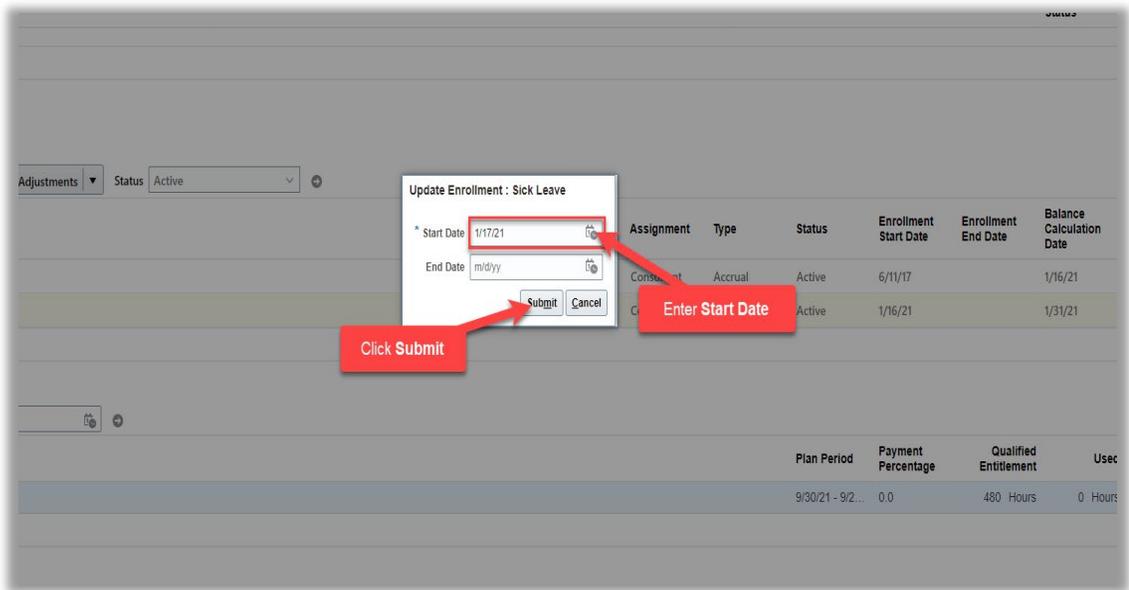
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



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



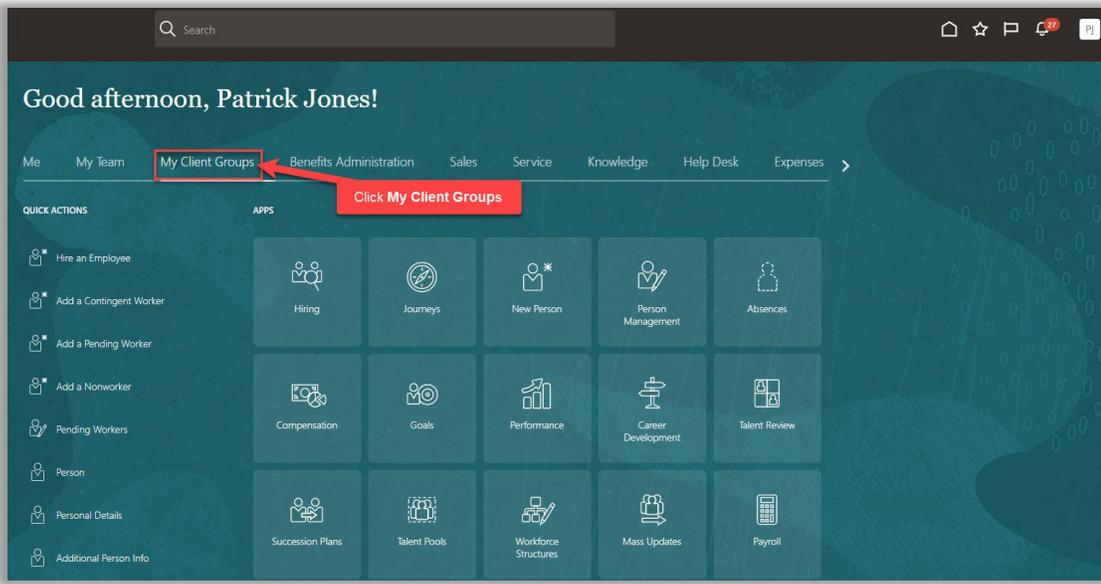
Update the Plan Enrollment **Start Date** and click **Submit**



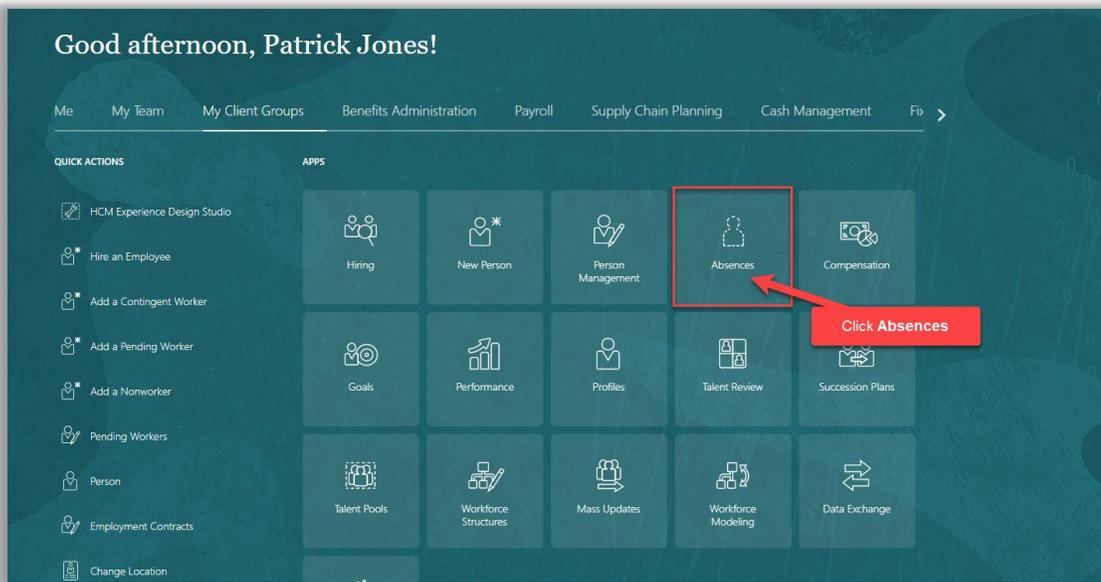
### Review Accrual Rates

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

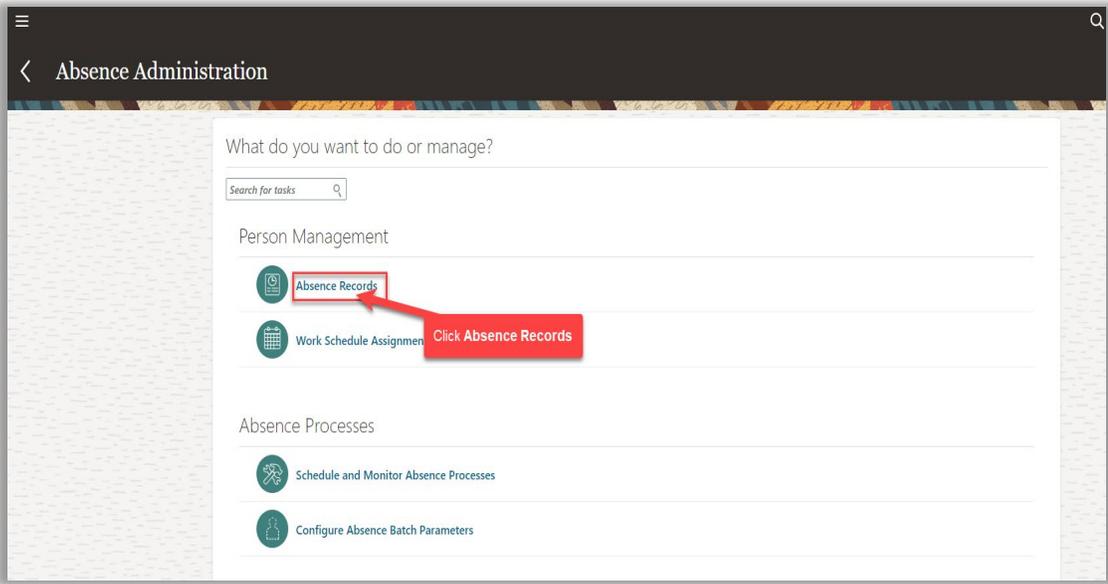
From the home screen, click **My Client Groups**



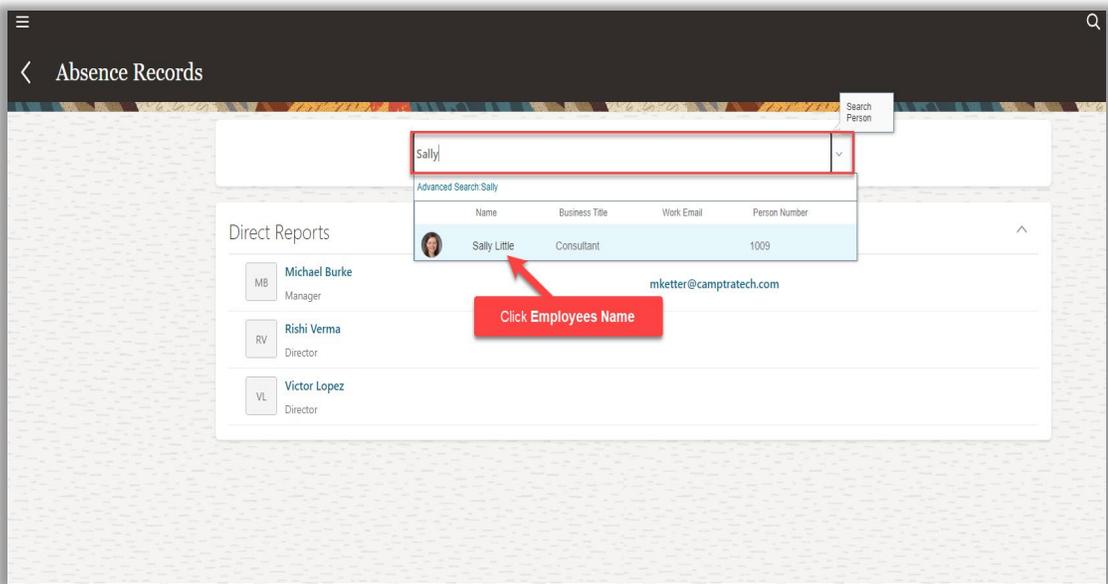
Next, click **Absences**



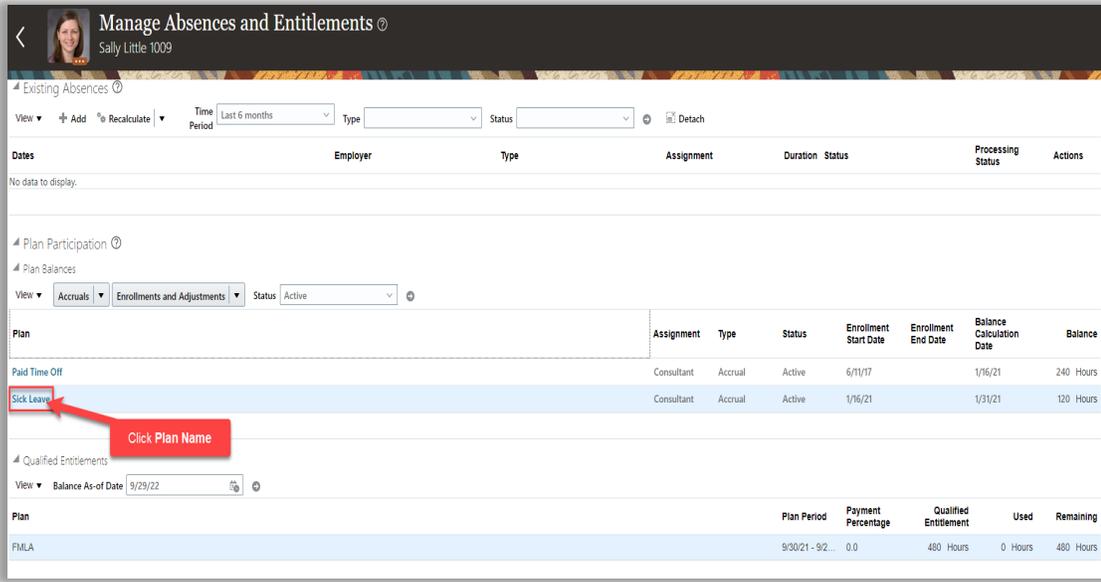
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



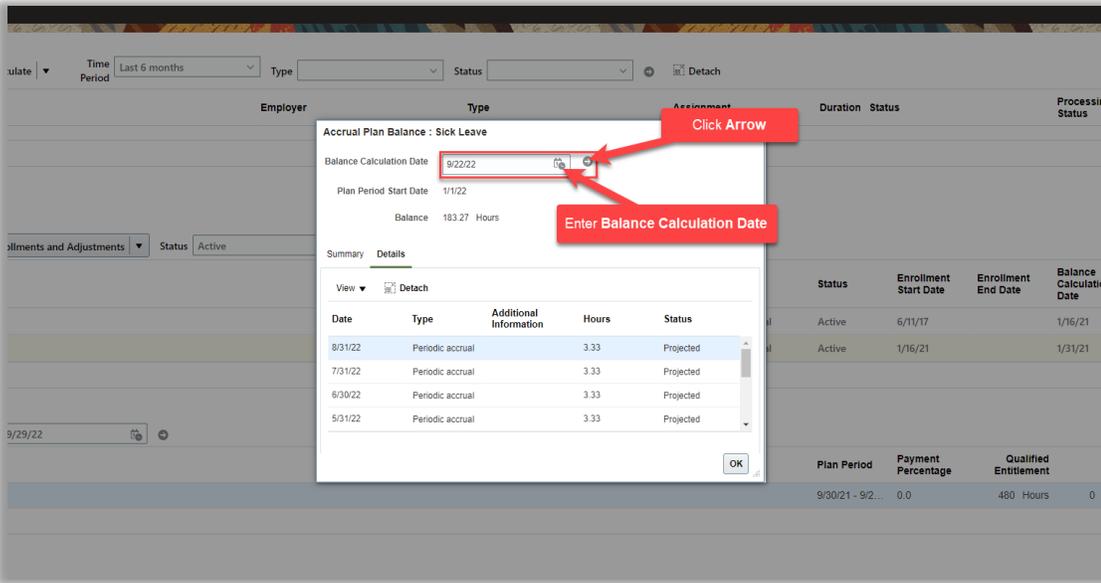
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



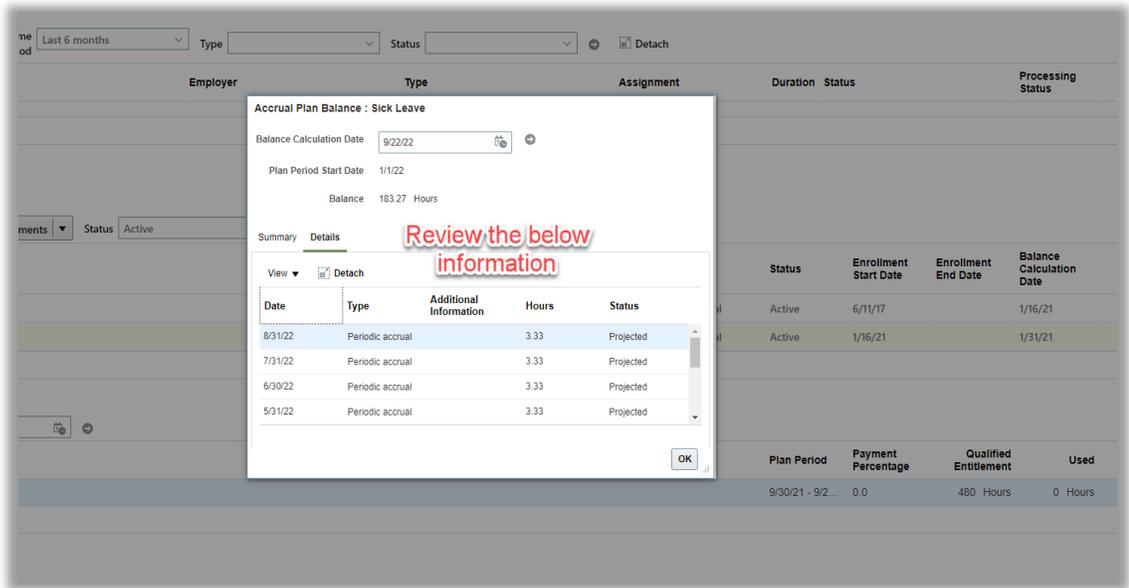
Under Plans, click the **Plan Name**



Enter the Balance Calculation Date and then, click the Arrow



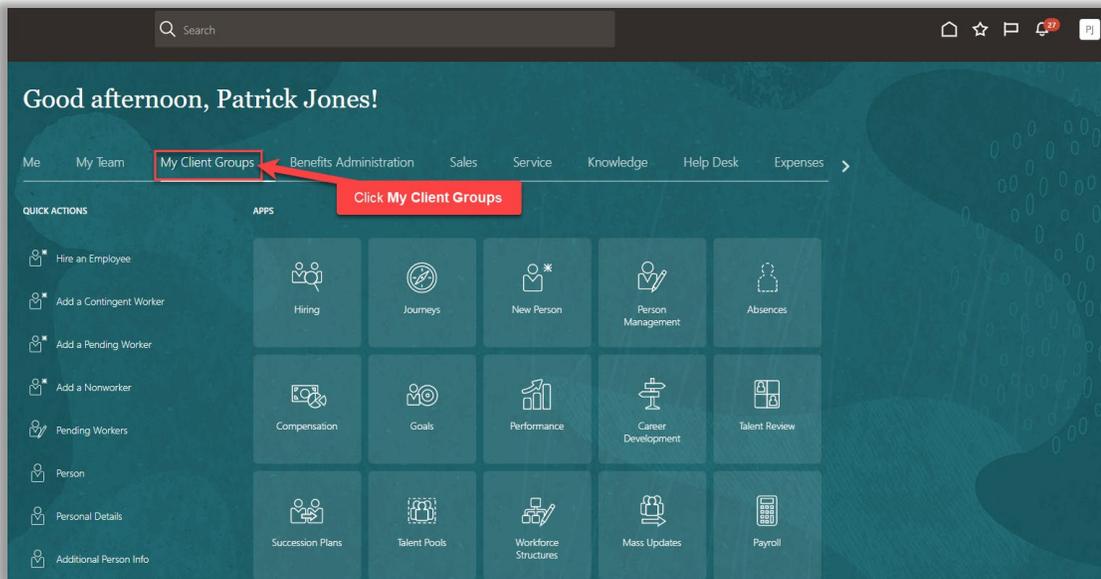
Scroll down to view the **Plan Details**. We can review the accrual rates under the **Hours** column as well as the **Date** in which the accrual is applied



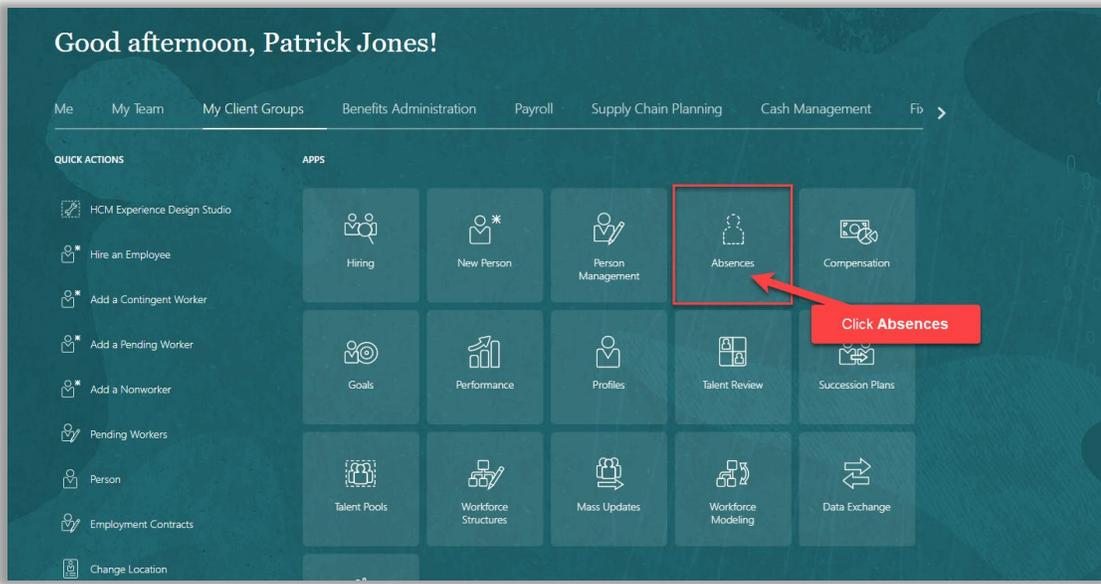
## Run Accruals Process For An Employee

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

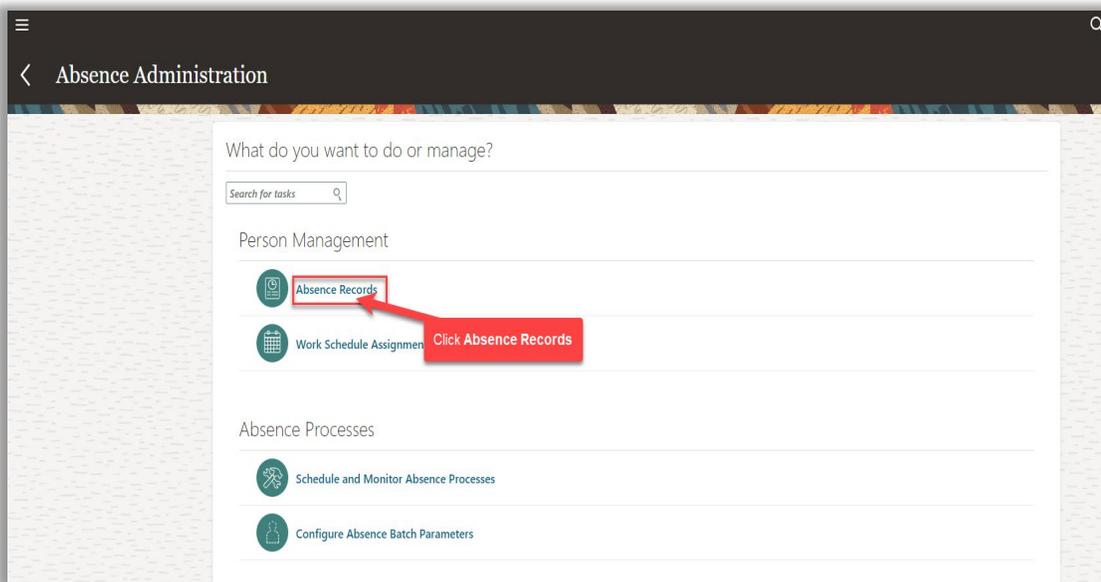
From the home screen, click **My Client Groups**



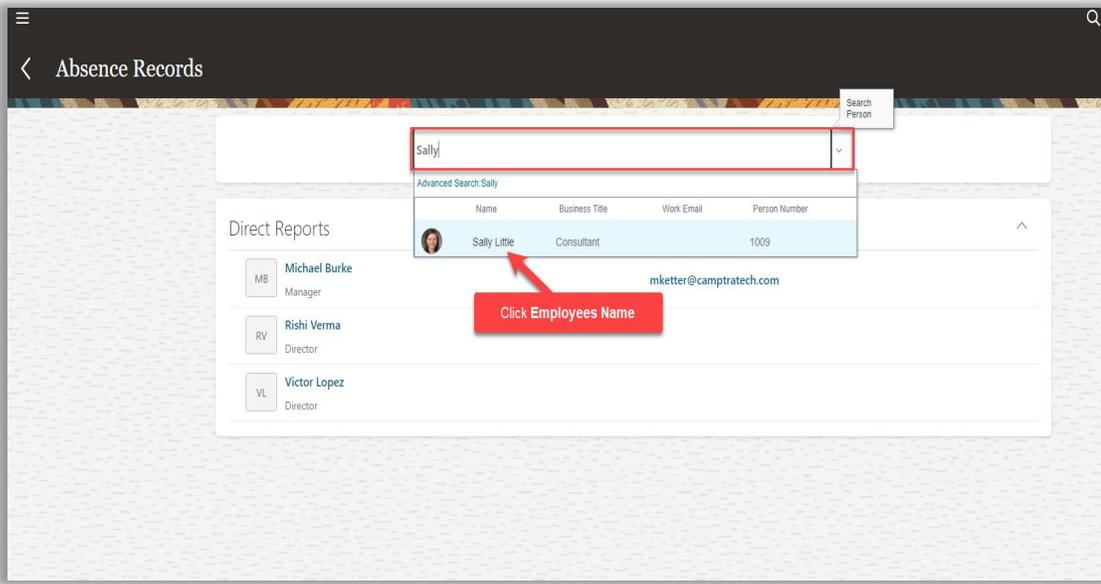
Next, click **Absences**



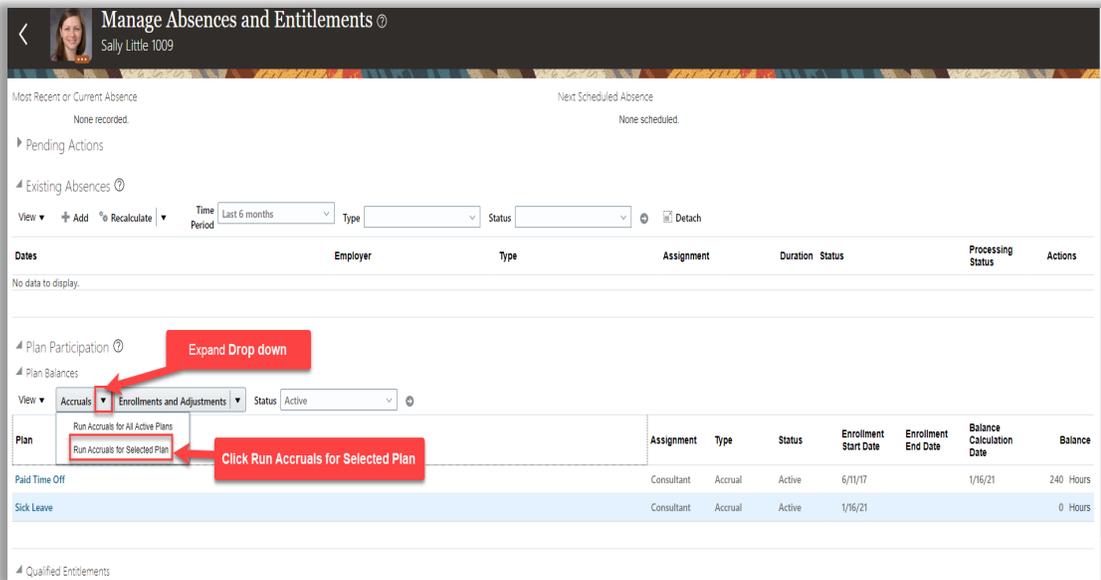
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



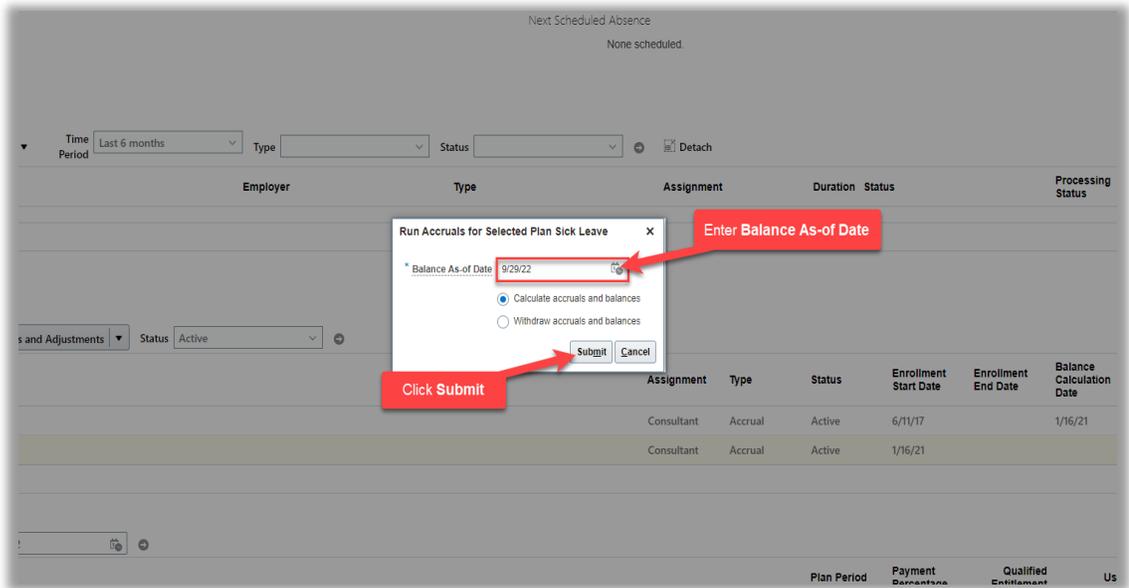
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



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**

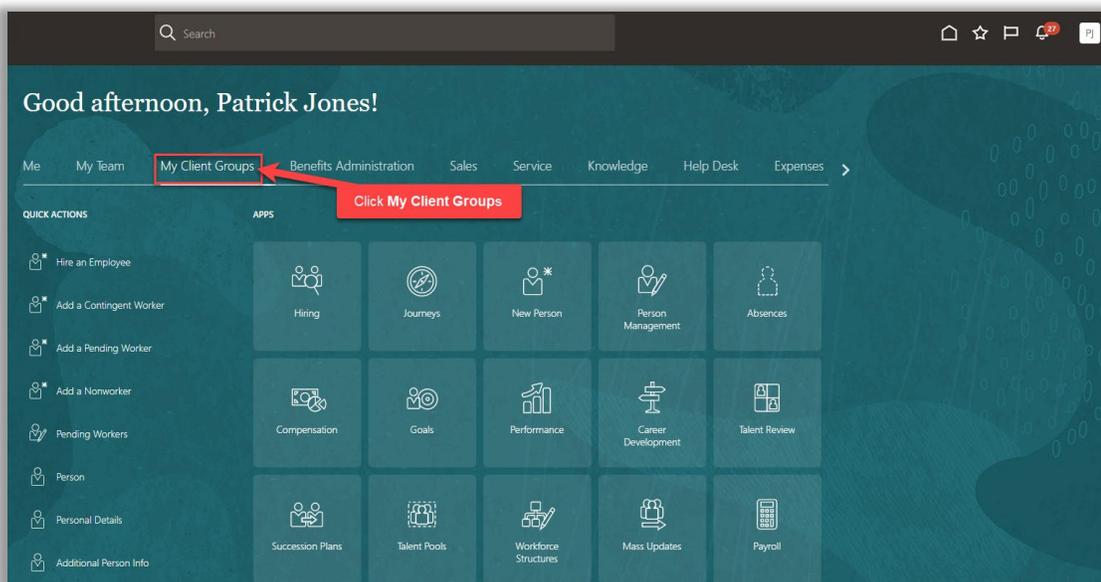


The **Plan Balance** has been updated.

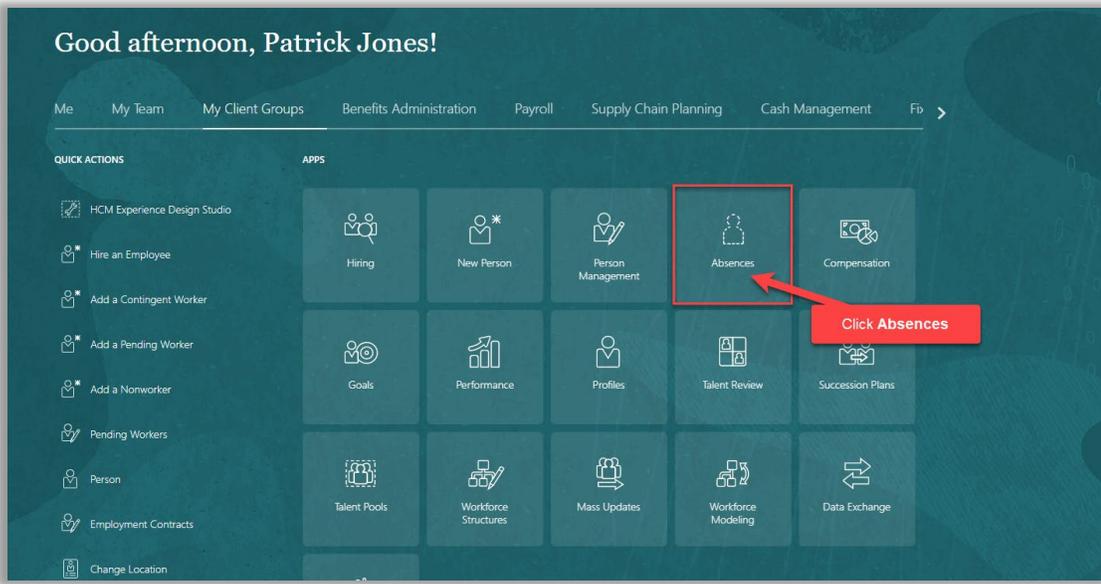
### End Date A Plan

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

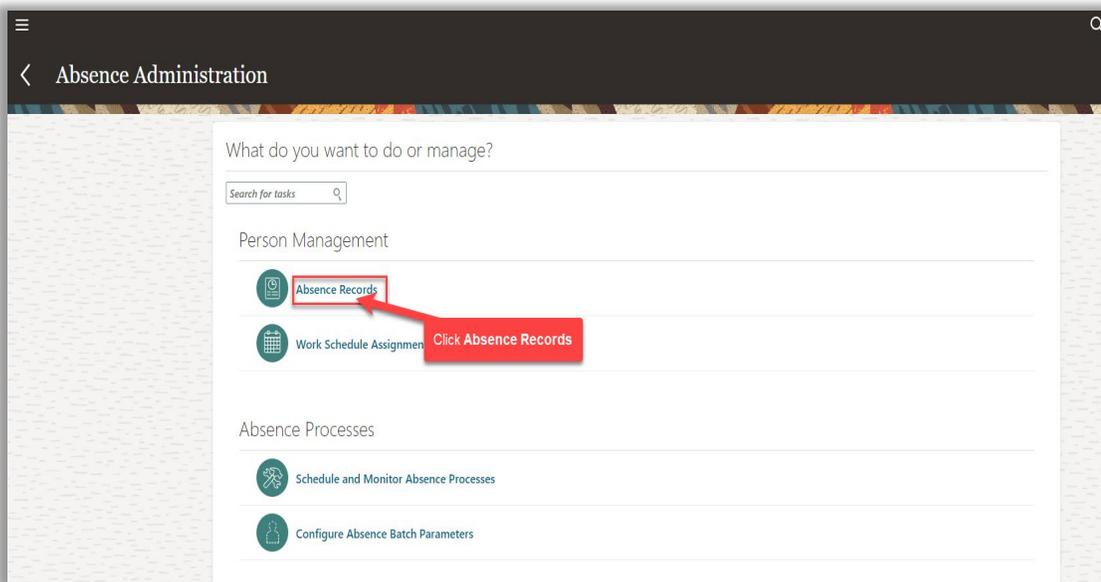
From the home screen, click **My Client Groups**



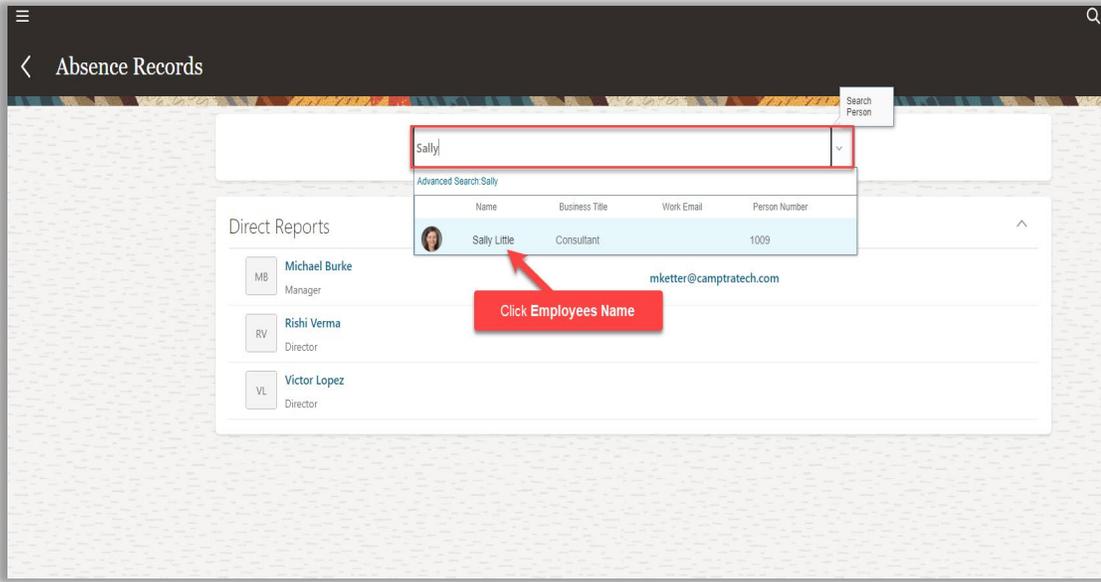
Next, click **Absences**



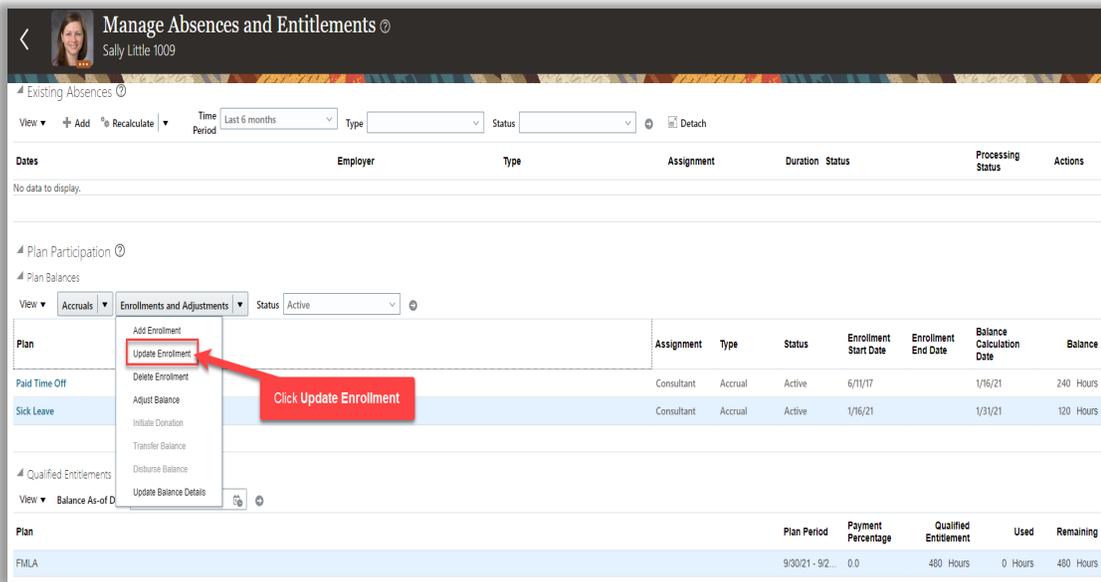
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



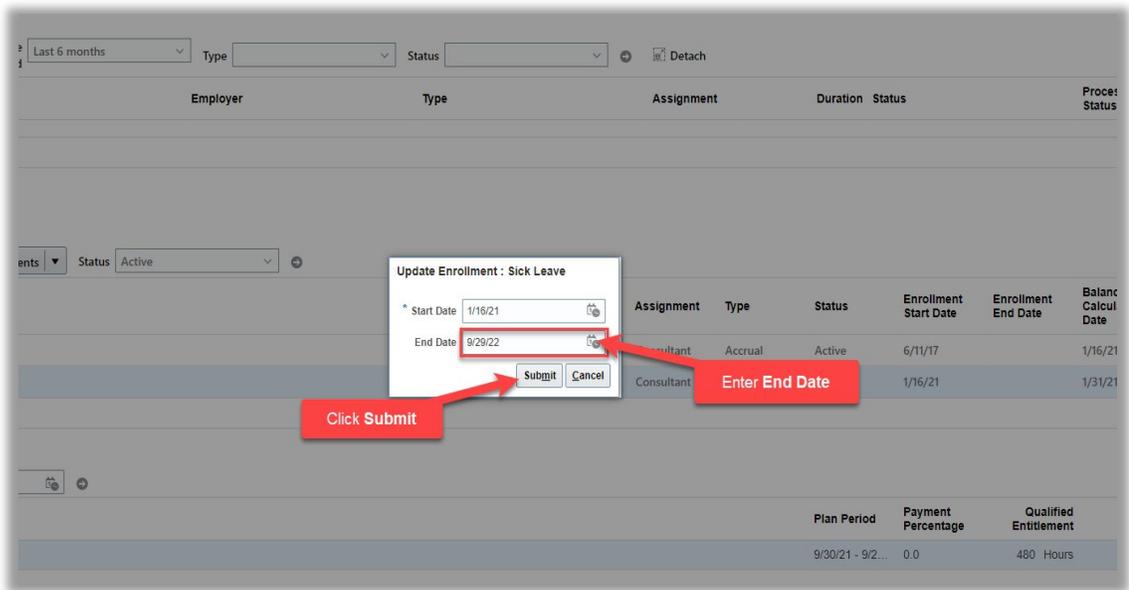
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



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



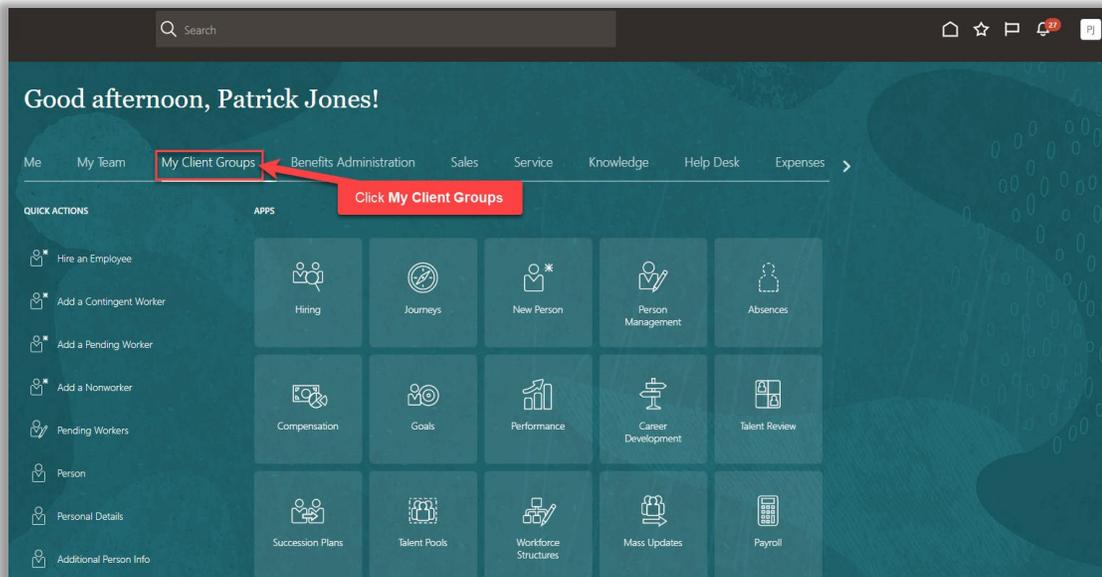
Update the Plan Enrollment **End Date** and click **Submit**



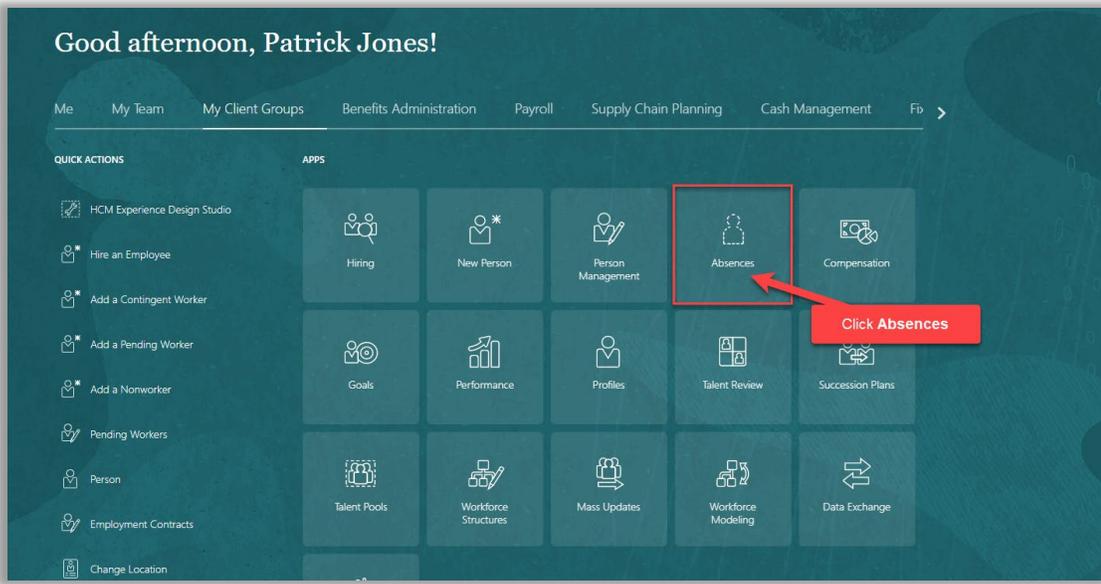
## Delete Plan Enrollment

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

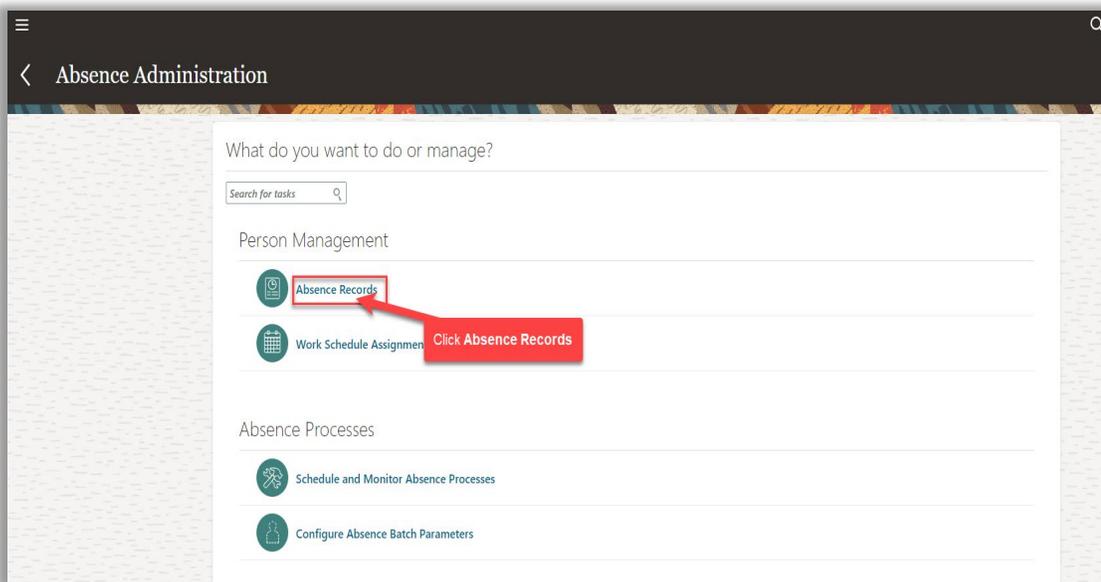
From the home screen, click **My Client Groups**



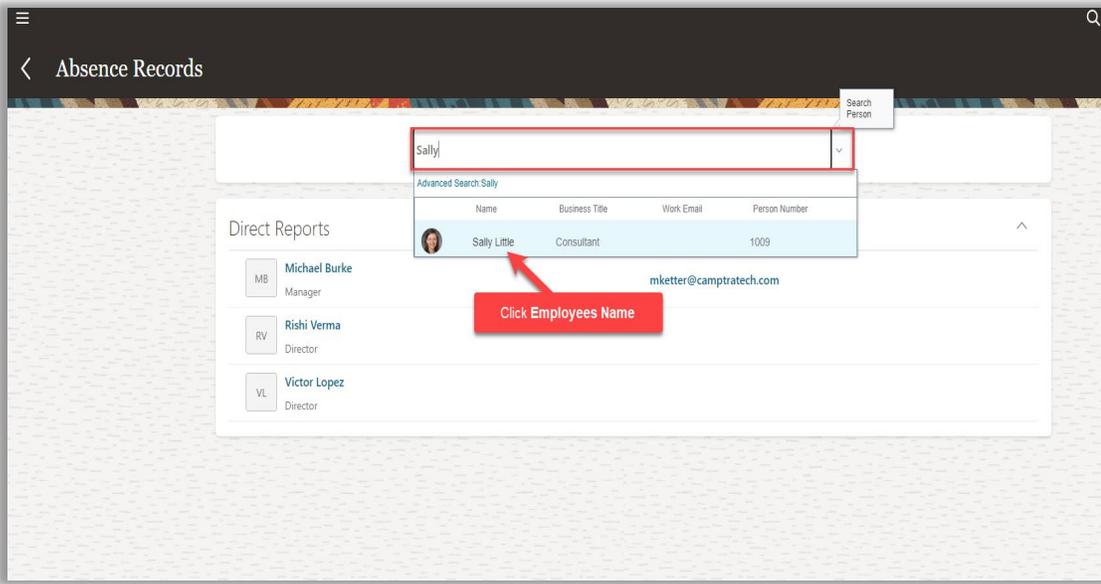
Next, click **Absences**



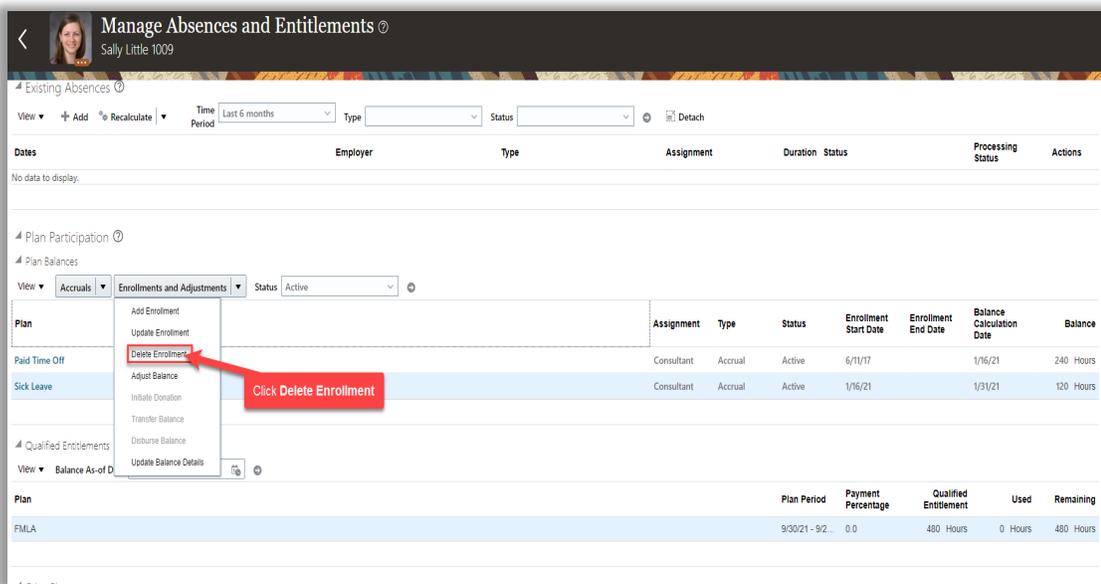
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



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**

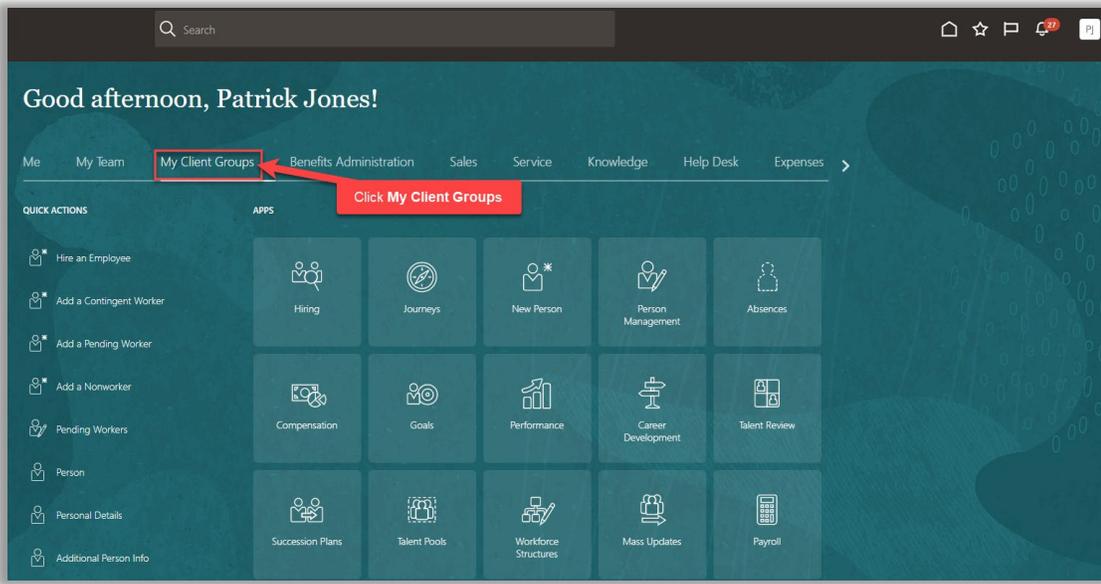


The **Absence Plan** will be deleted.

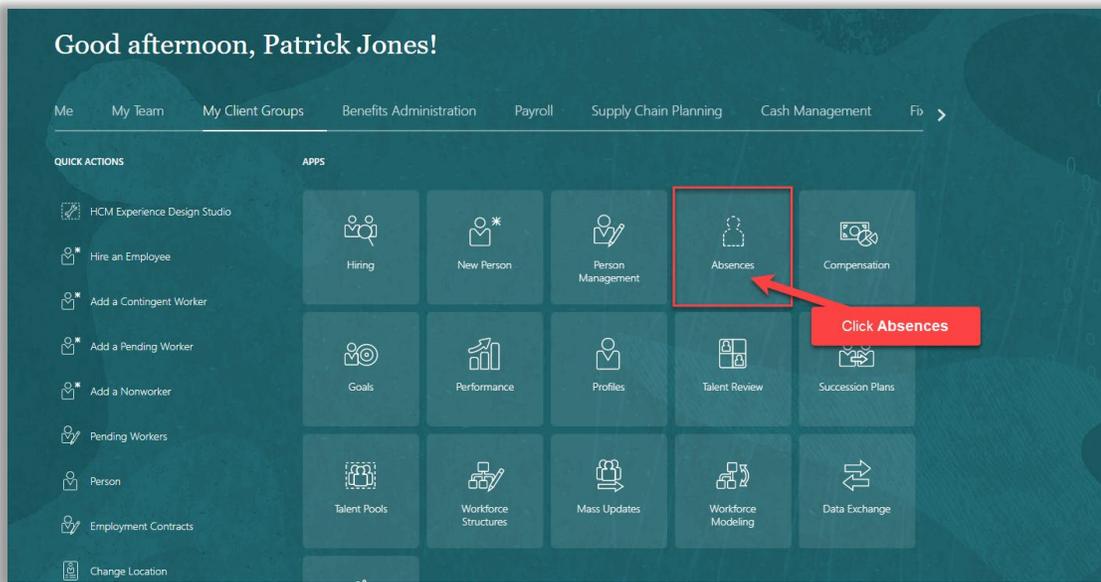
### Enter An Absence Request On Behalf Of An Employee

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

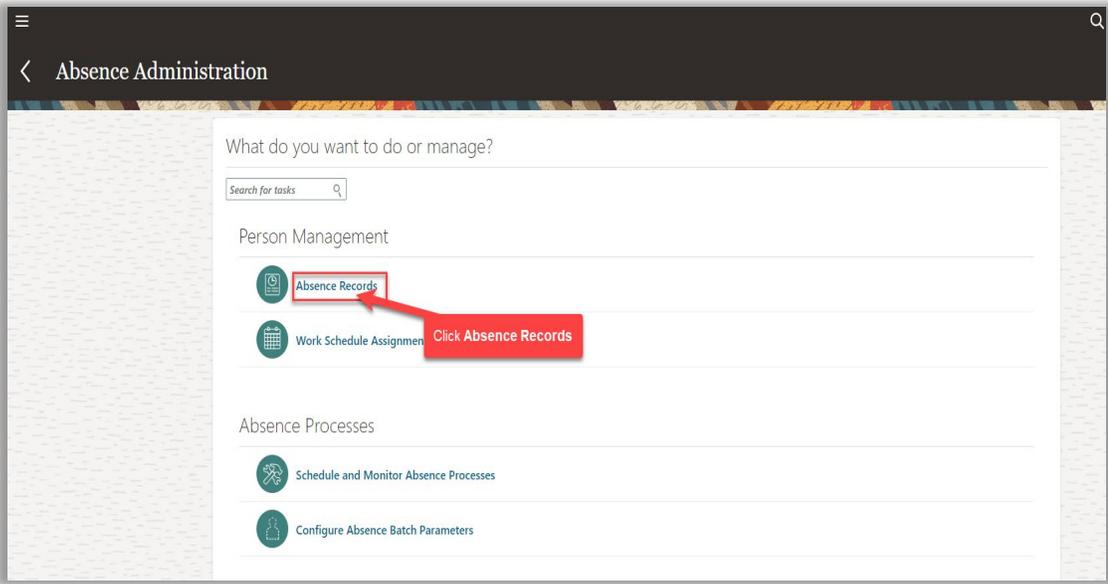
From the home screen, click **My Client Groups**



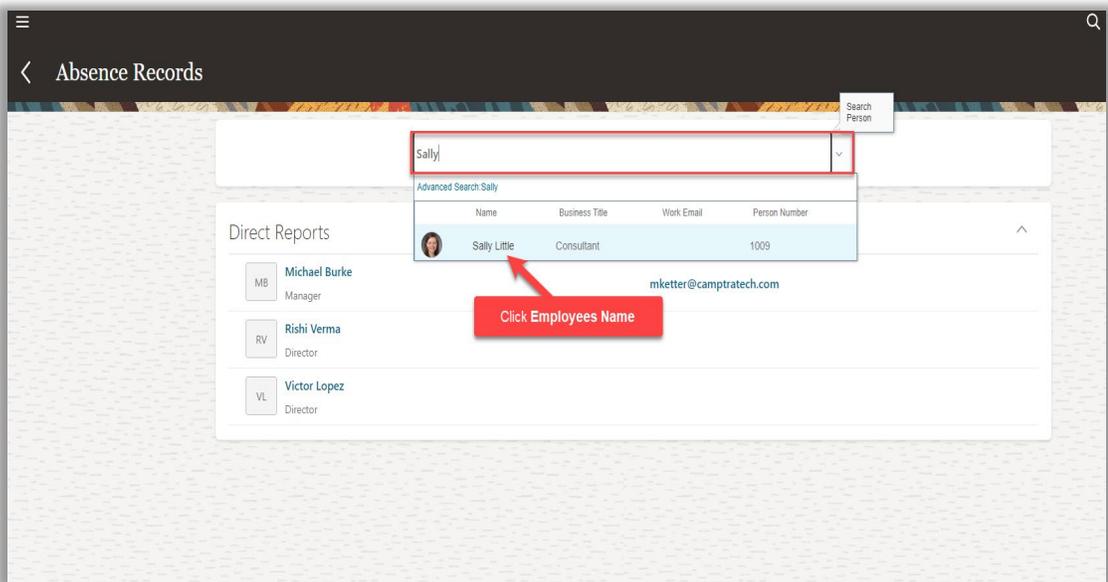
Next, click **Absences**



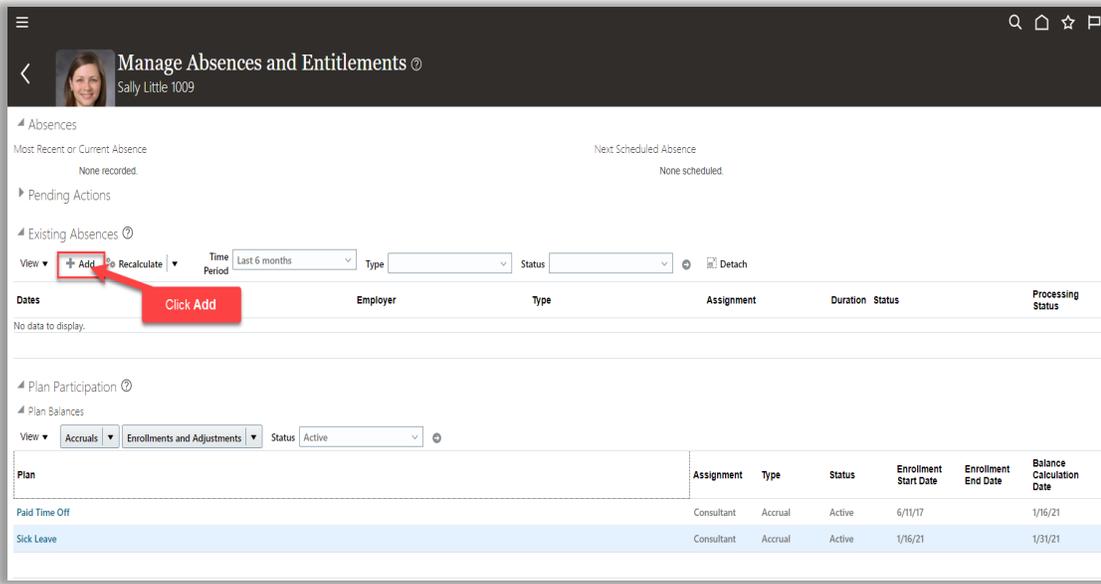
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



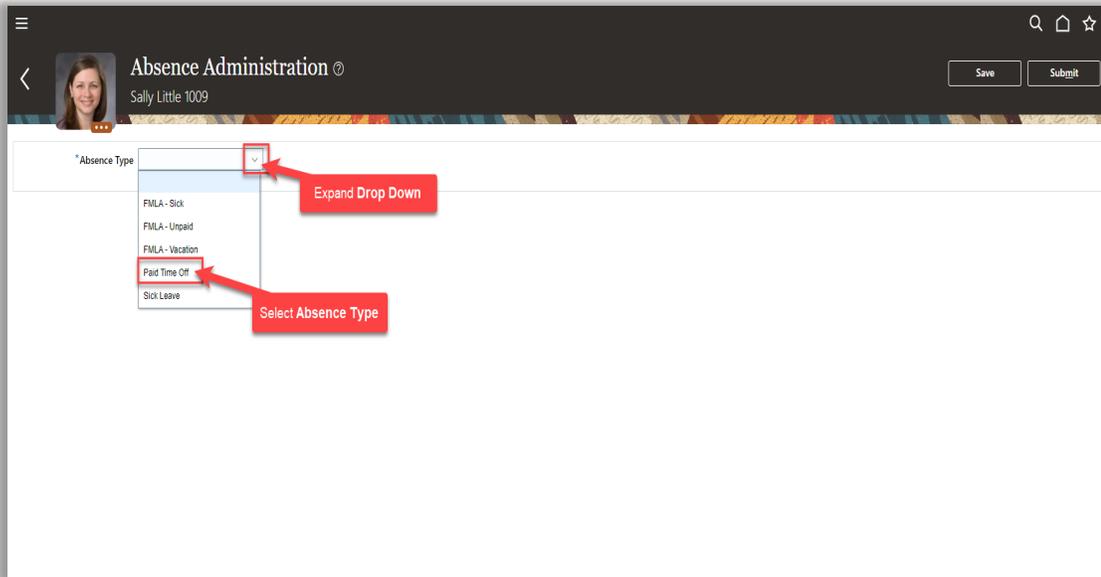
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



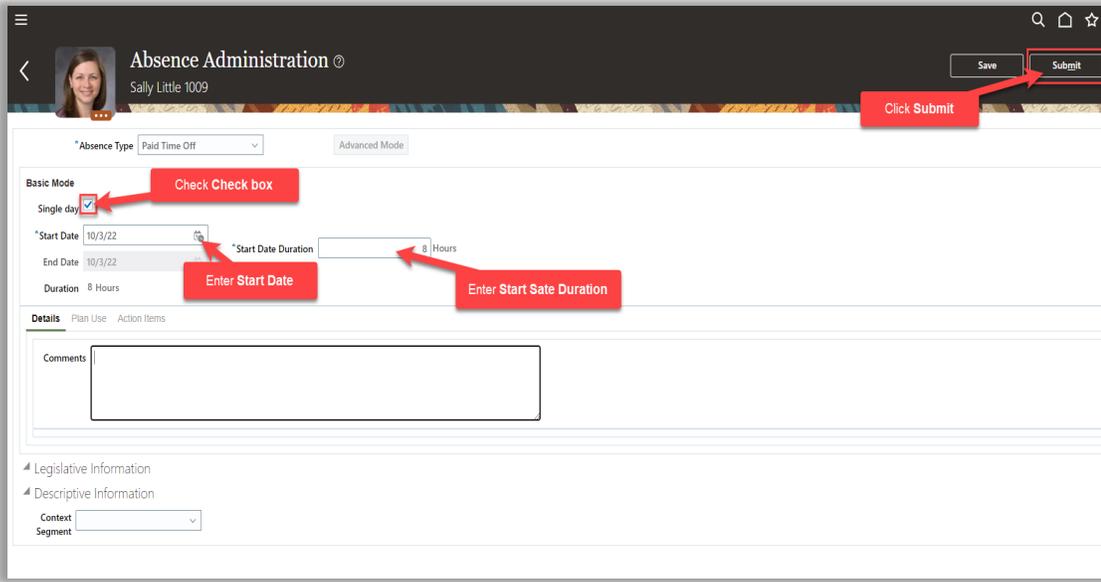
Under **Existing Absences**, click **Add**



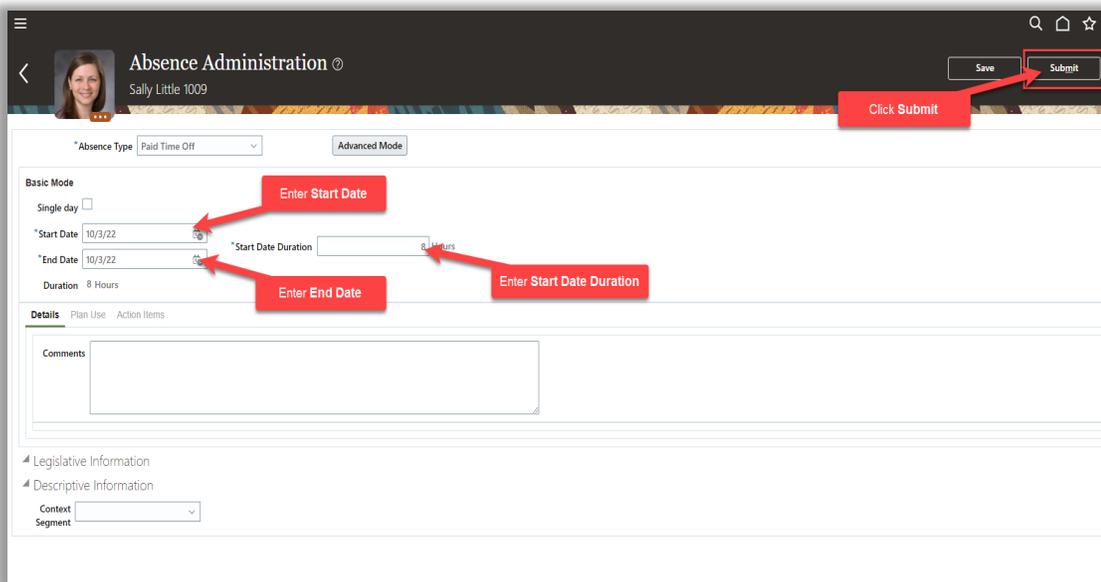
Expand the **Absence Type** drop down and select the **Plan**



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**



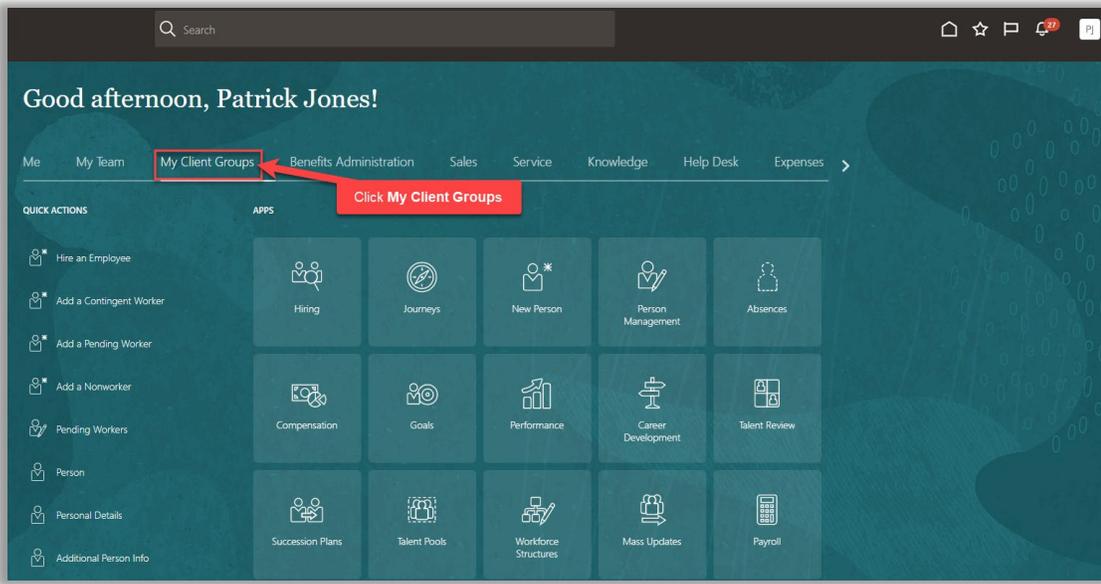
If the employee will need to be off for more than one day, Enter the **Start Date**, **End Date**, **Start Date Duration**, **Comments** and click **Submit**



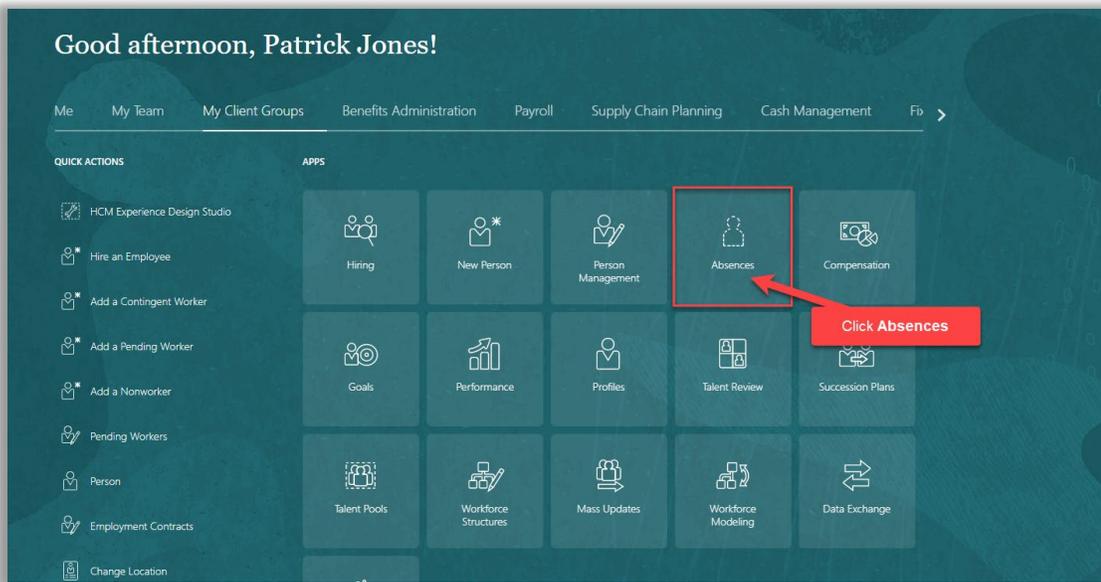
## HR Approve Absence Request

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

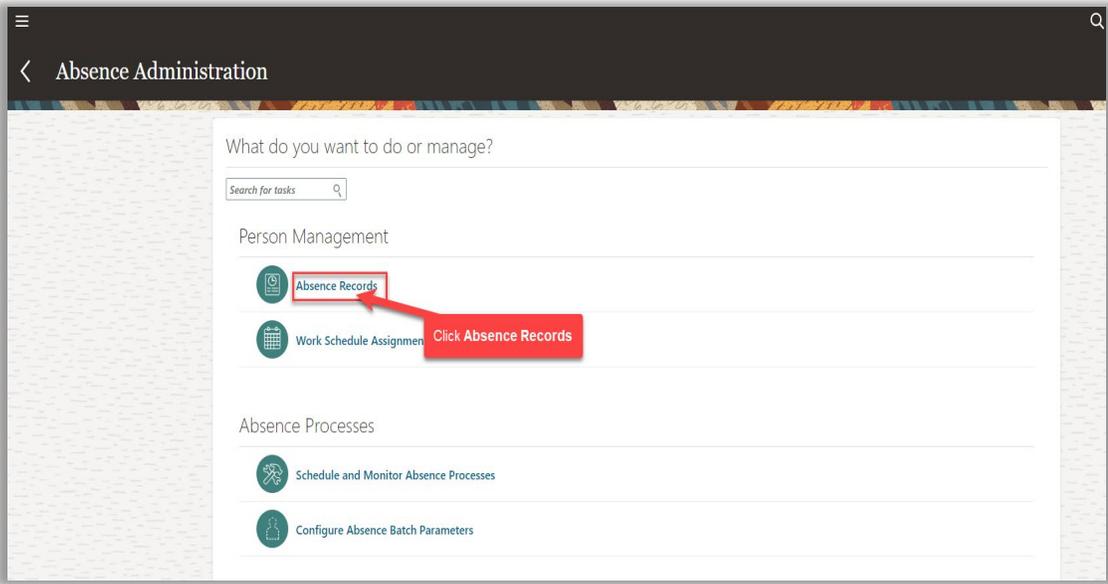
From the home screen, click **My Client Groups**



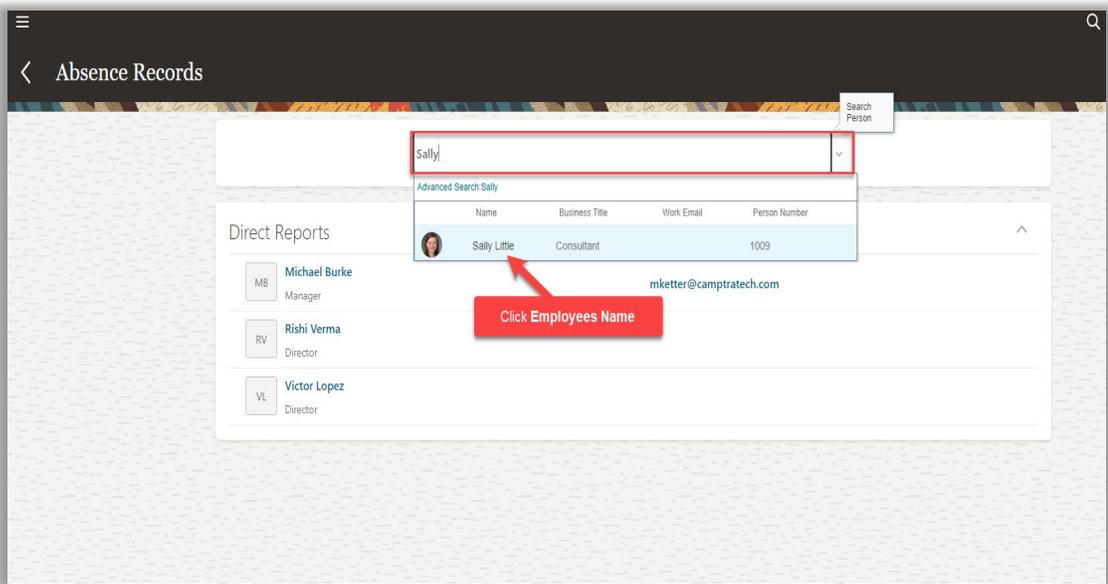
Next, click **Absences**



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**

4 Absences

Most Recent or Current Absence

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

Next Scheduled Absence

Type Sick  
Assignment  
Dates 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	✓	

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 Absence Request Date

Click Submit

vision

Absence Administration ©  
Robert Jackman 541

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

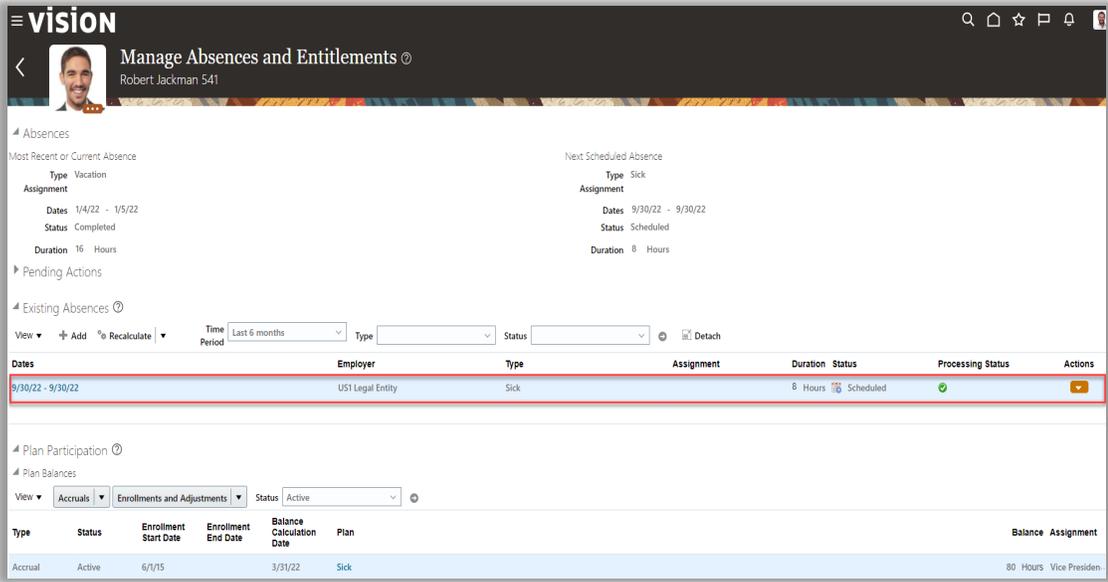
Legislative Information

Descriptive Information  
Context Segment

Save Submit

Click Submit

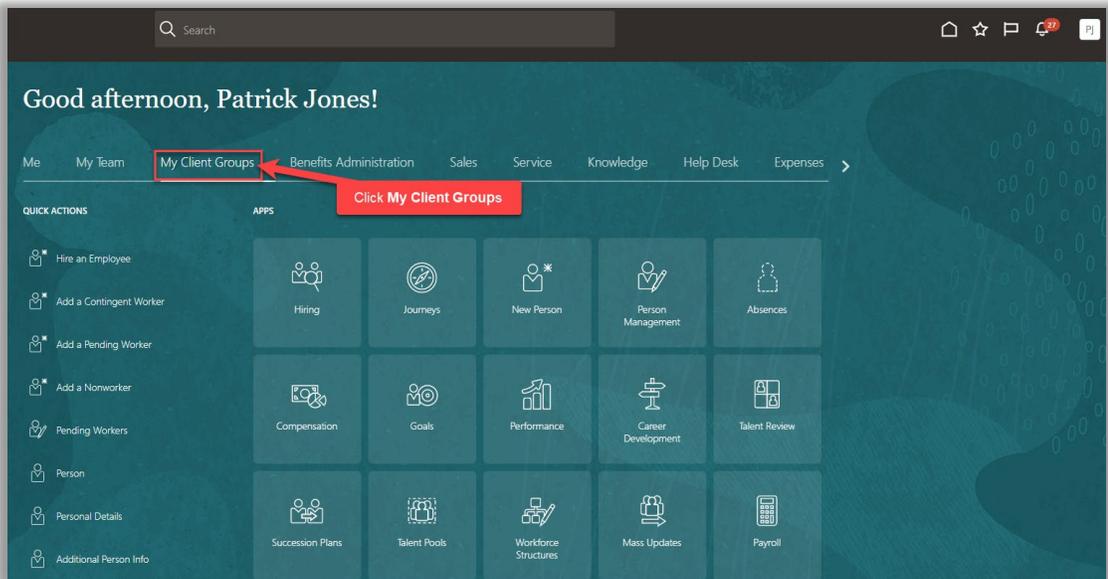
The leave request has been **Approved** and the Status is now **Scheduled**



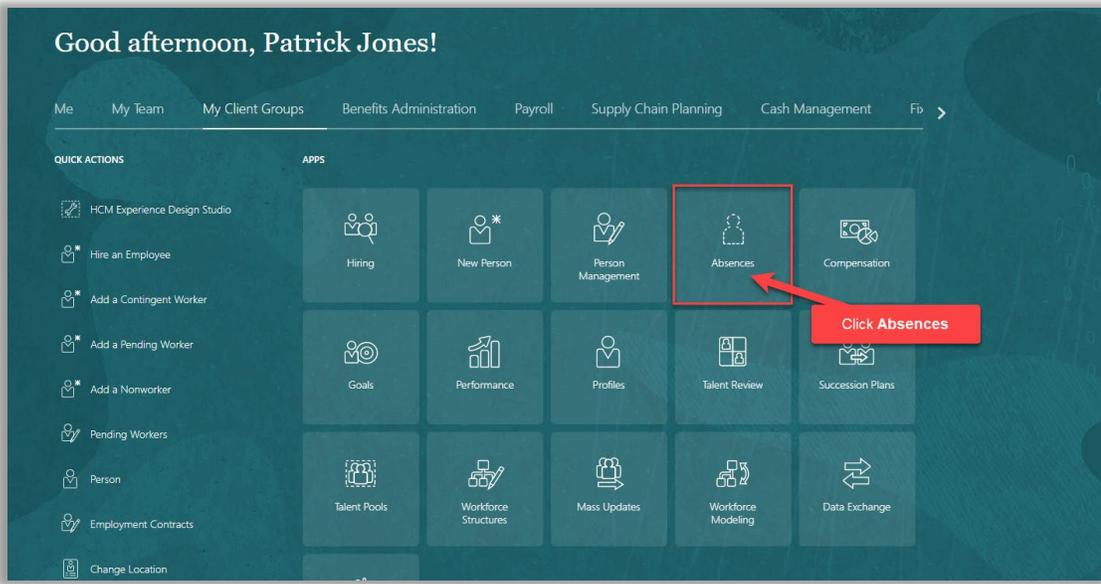
## Withdraw An Absence Request

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

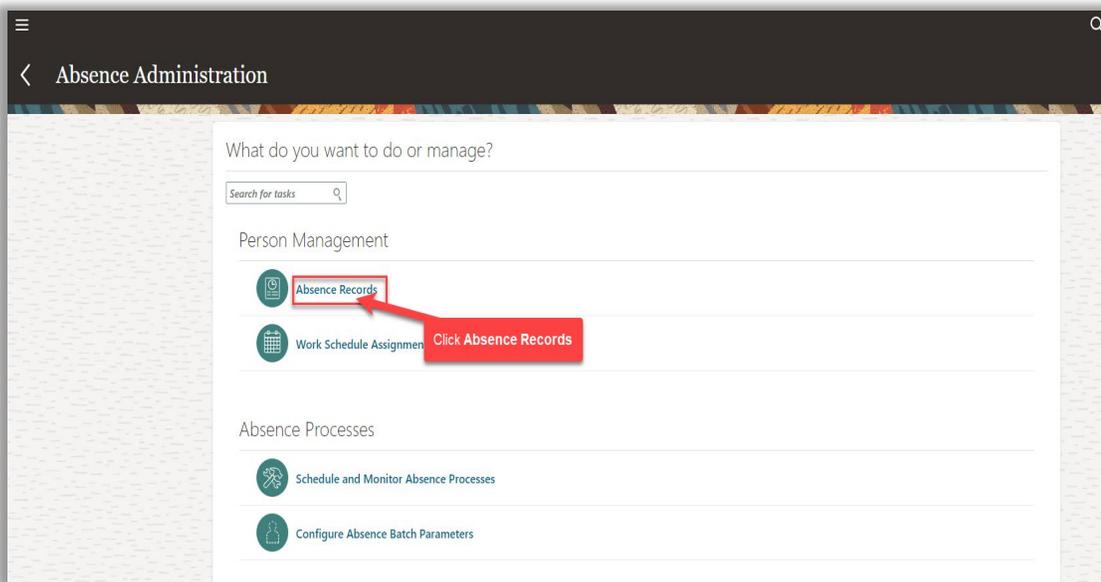
From the home screen, click **My Client Groups**



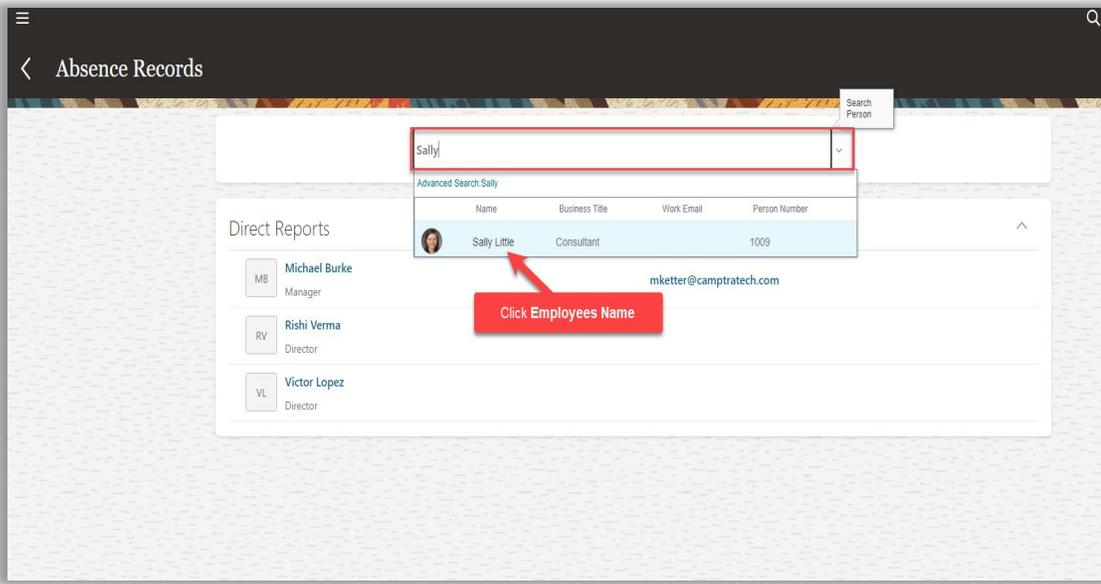
Next, click **Absences**



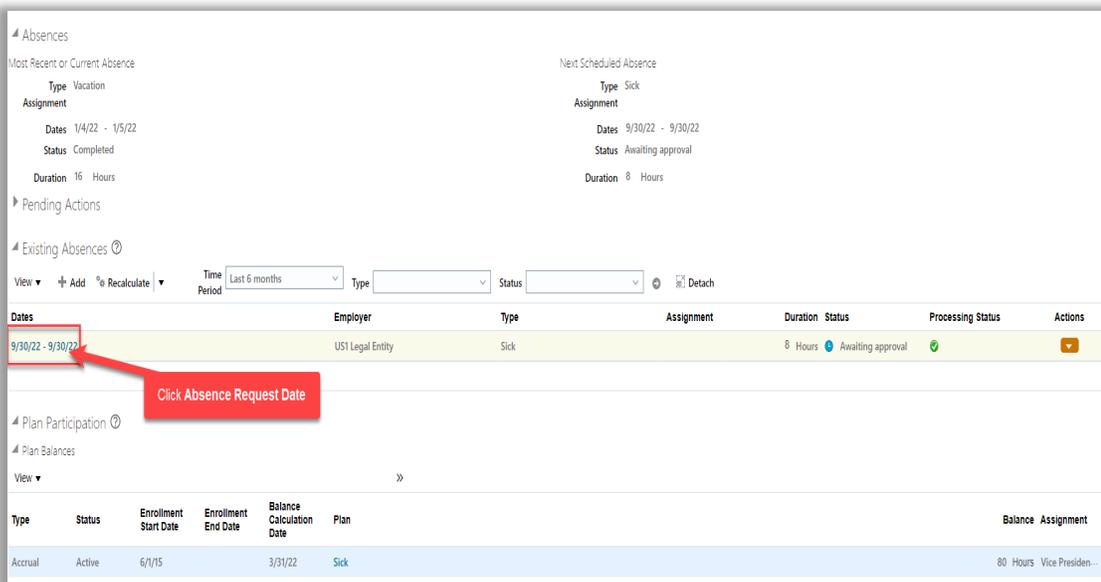
Click **Absence Records** under **Person Management**. If preferred, we can also search the words **Absence Records** in the Search box at the top



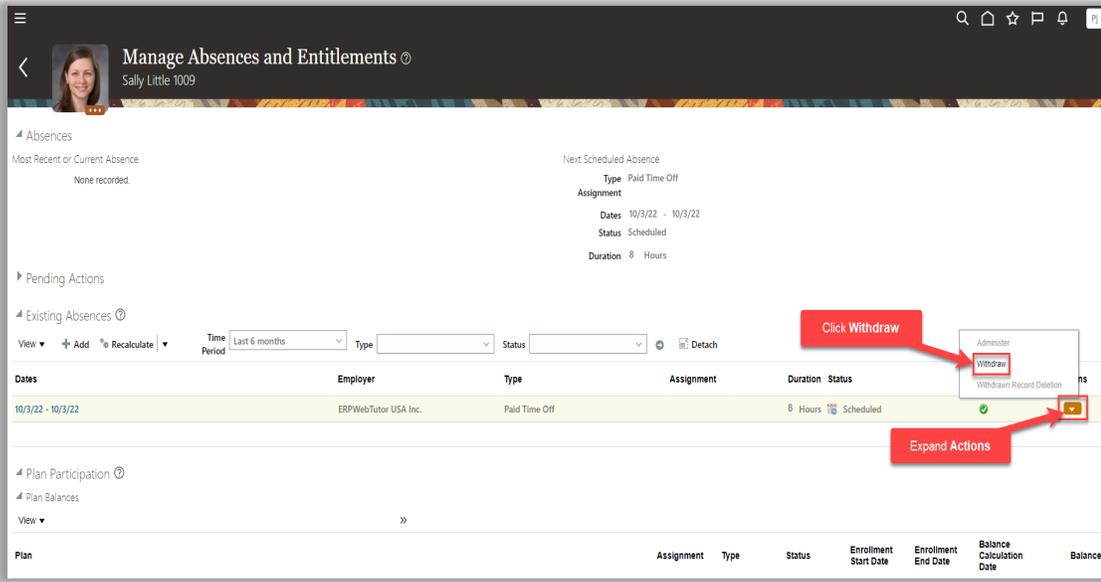
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



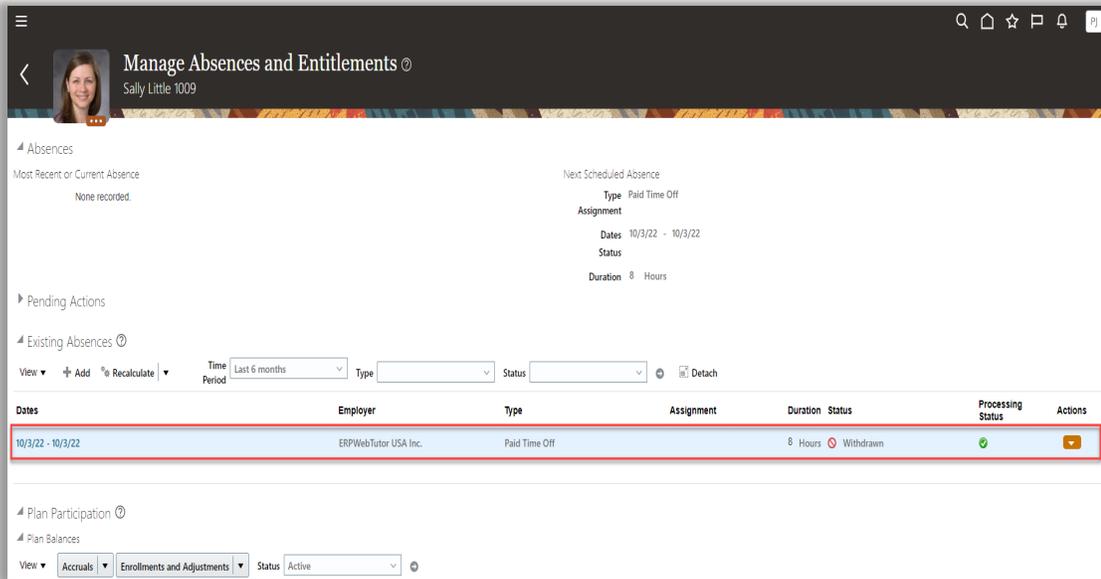
Under **Existing Absences**, click **Absence Request Date**



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



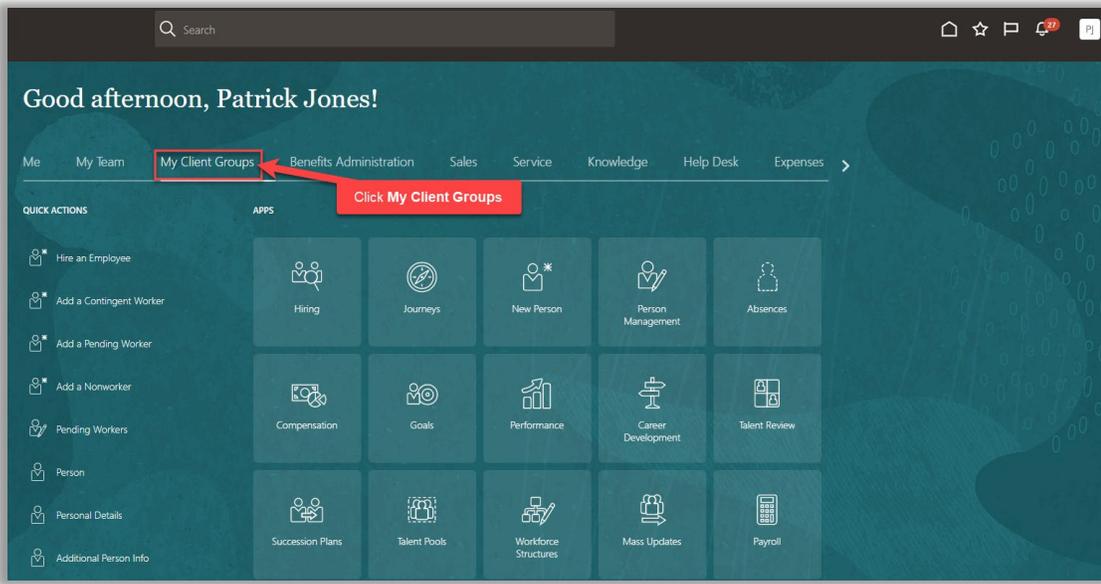
Click **OK**. The leave request has been **Withdrawn**



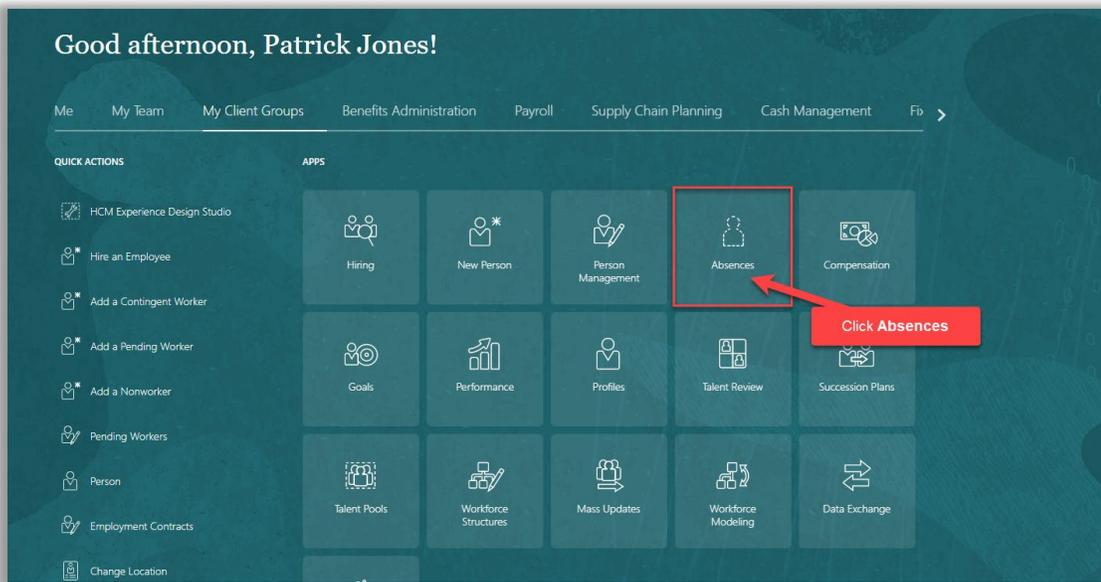
## Calculate Accruals & Balance Process For Employee Population

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

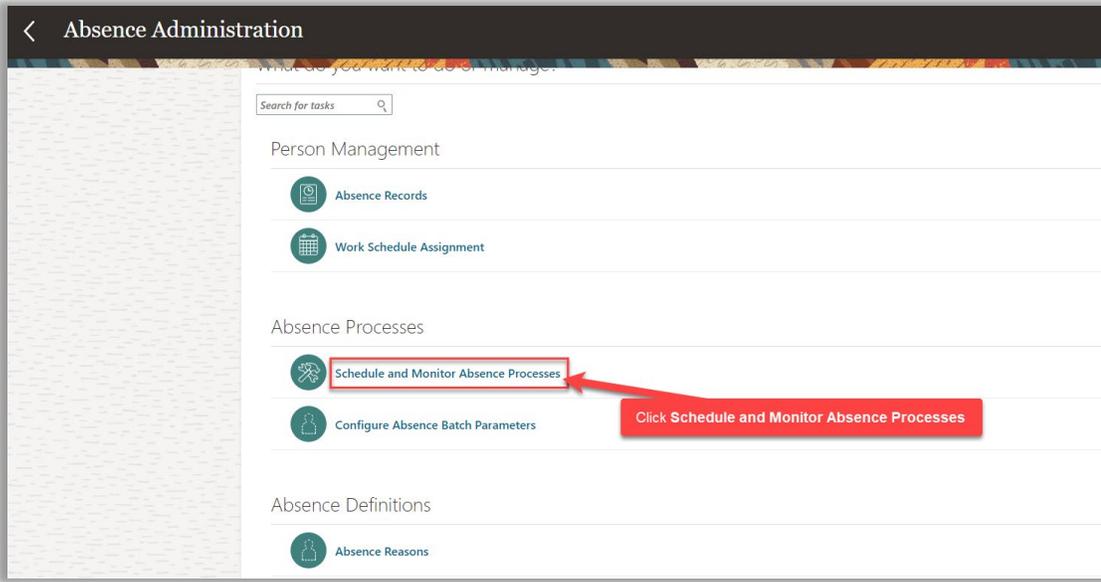
From the home screen, click **My Client Groups**



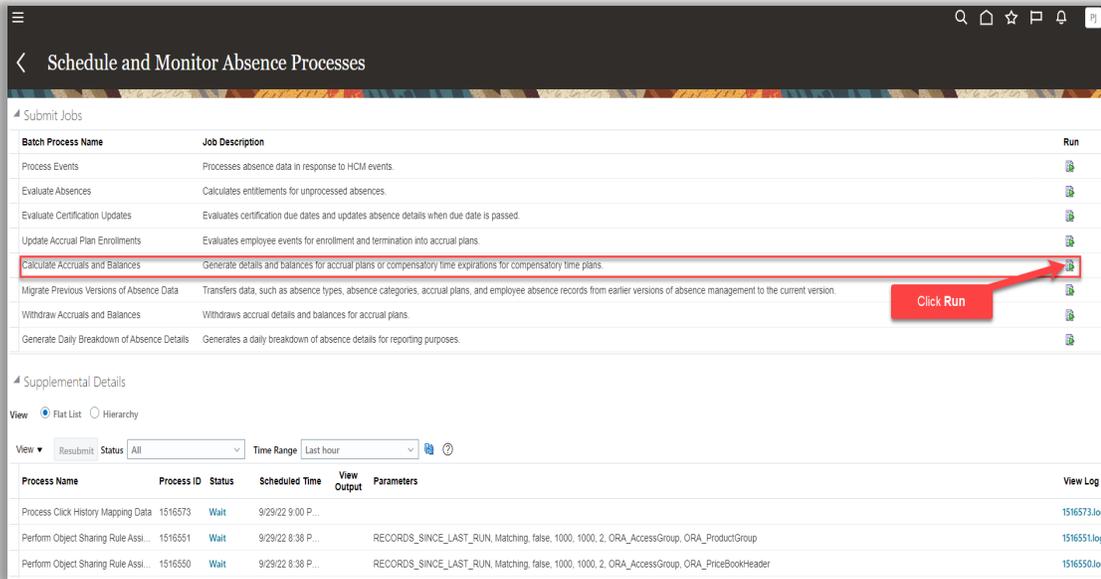
Next, click **Absences**



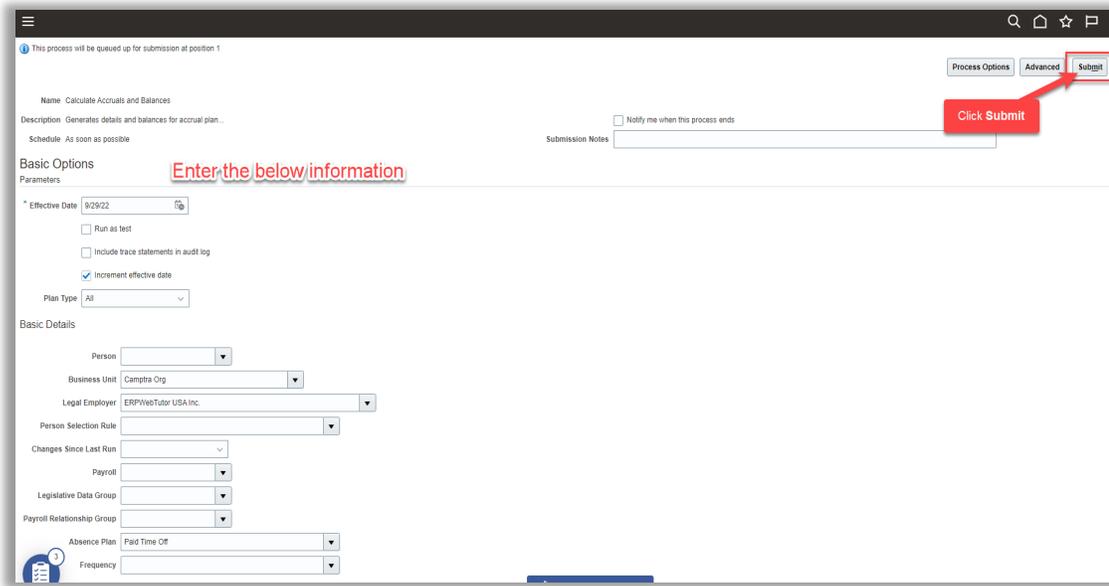
Click **Schedule and Monitor Absence Processes** under **Absence Processes**. If preferred, we can also search the words **Schedule and Monitor Absence Records** in the Search box at the top



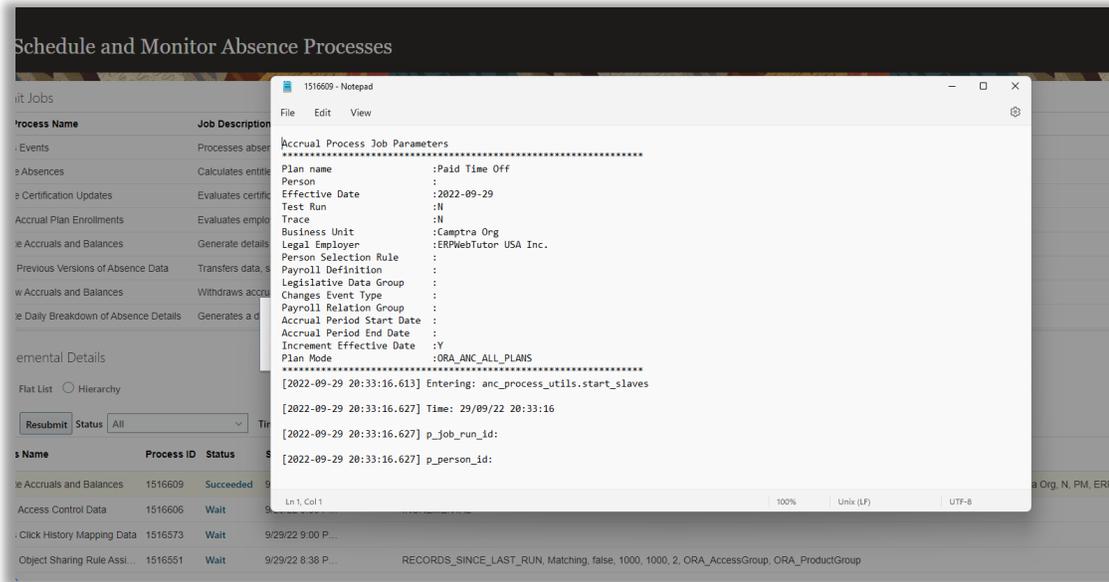
Under **Submit Jobs** click **Run** across from **Calculate Accruals and Balances**



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**



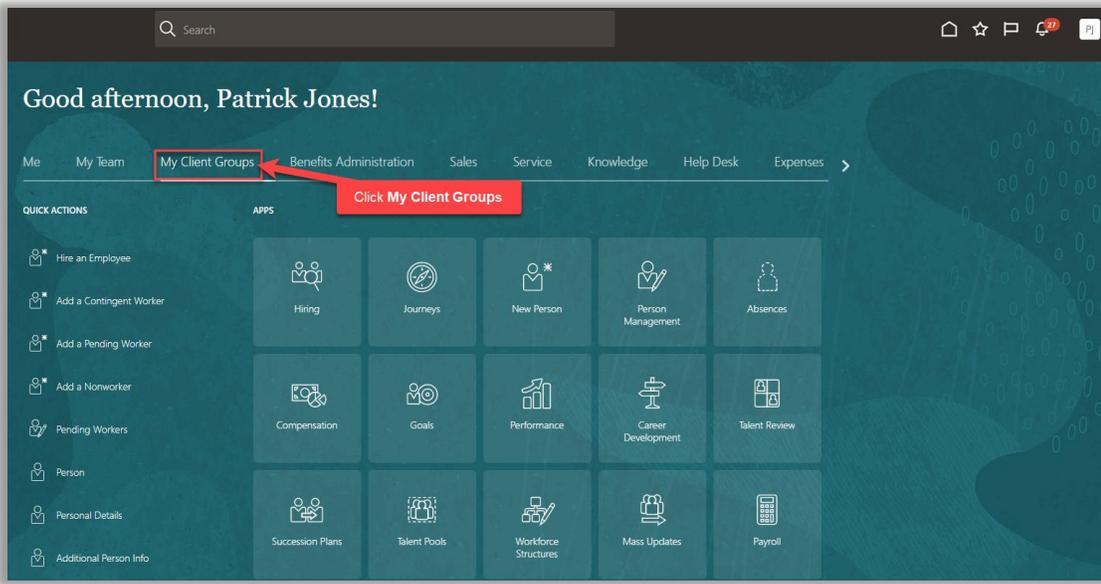
We can monitor the Process under **Supplemental Details**. We can click **Refresh** to update the **Status**. Once the **Status** is **Succeeded**, click the **Paper** under **View Log** to view the details of the process



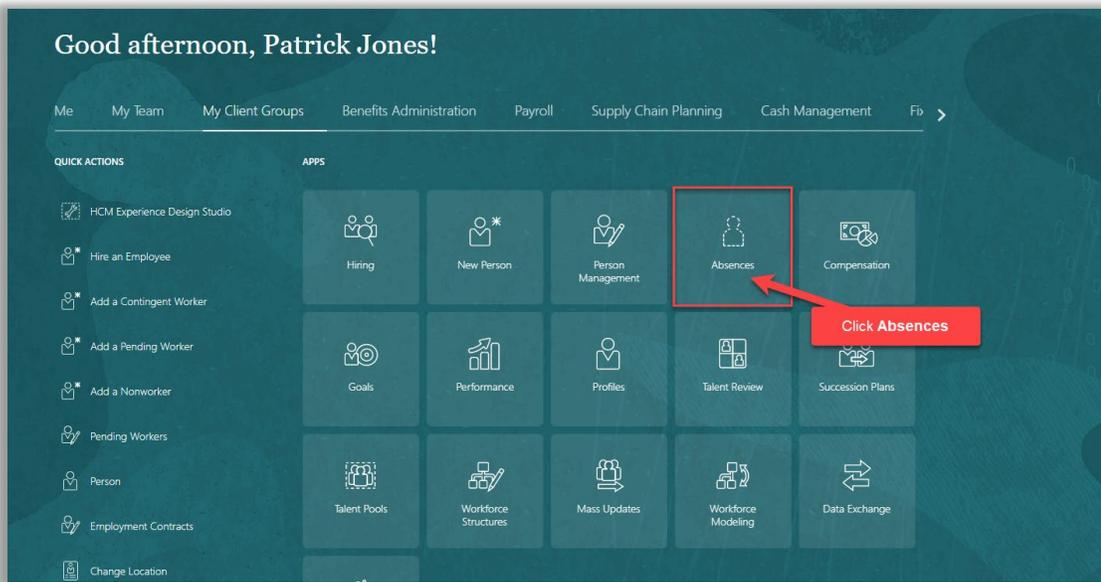
## Schedule Calculate Absence Accrual Process

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

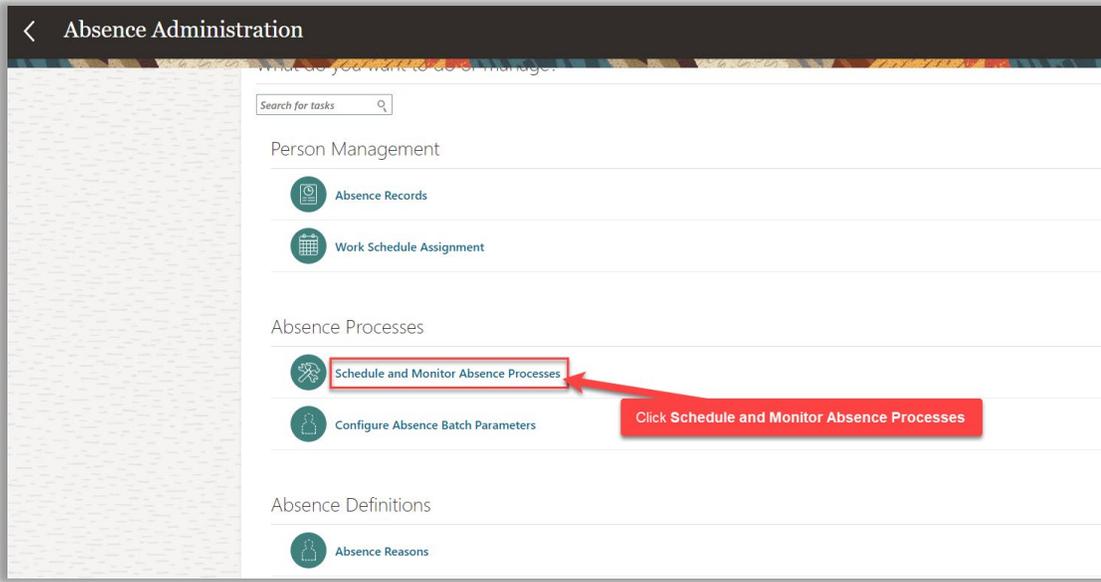
From the home screen, click **My Client Groups**



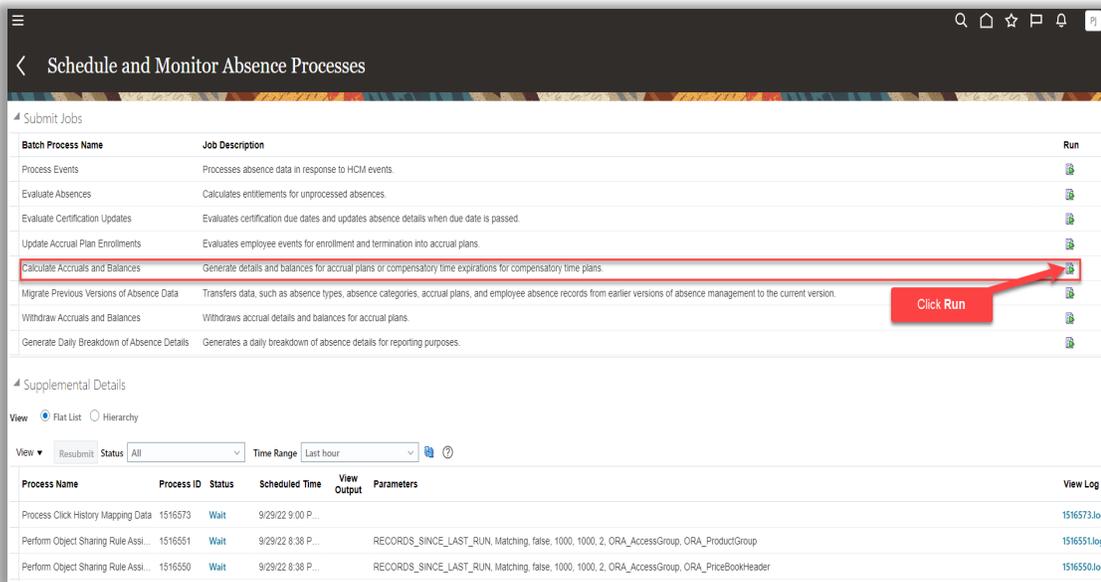
Next, click **Absences**



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



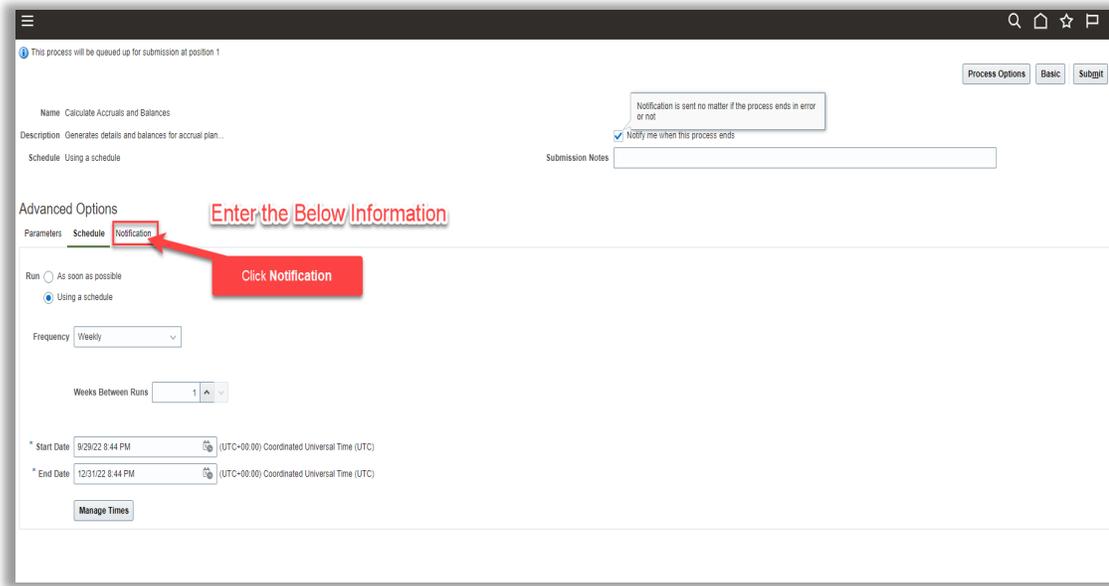
Under **Submit Jobs** click **Run** across from **Calculate Accruals and Balances**



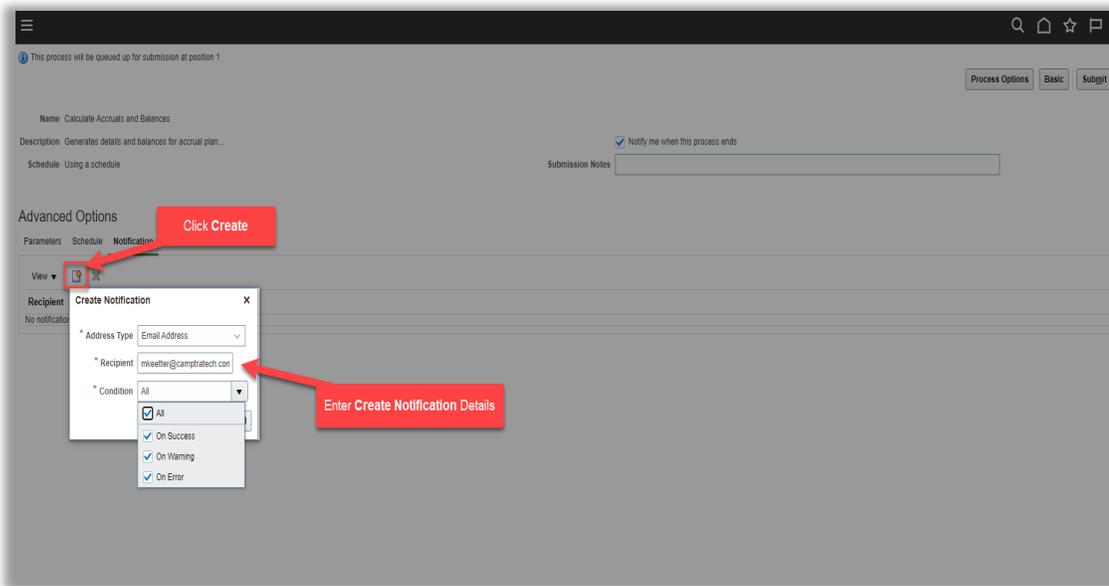
Click **Advanced**

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**

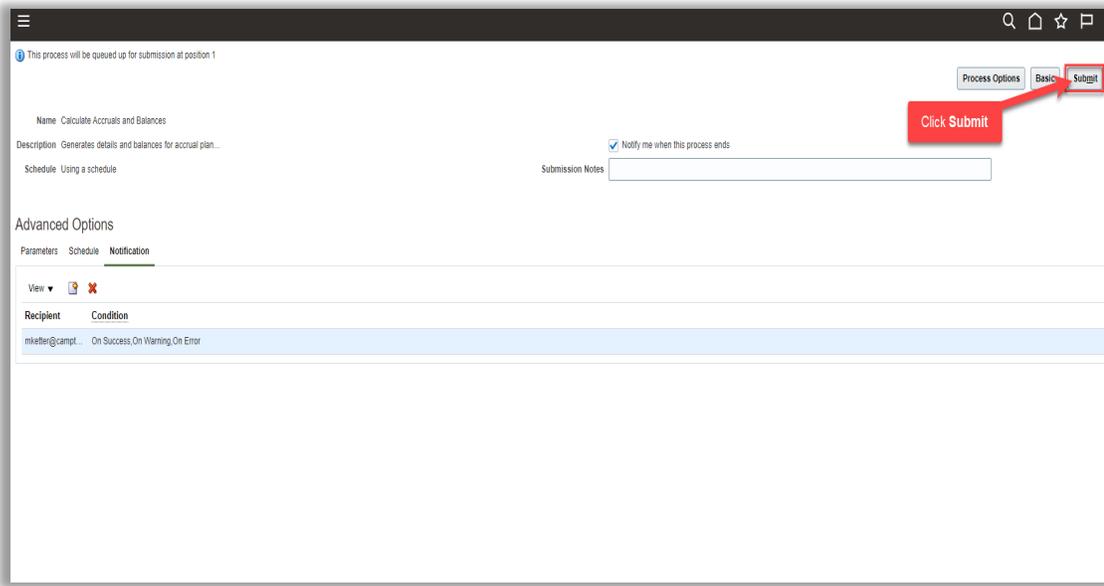
On the **Schedule** tab, click **Using a schedule**. Select the **Frequency** from the drop down, enter the **Start Date** and **End Date**, click **Notify me when this process ends**. Click **Notification**



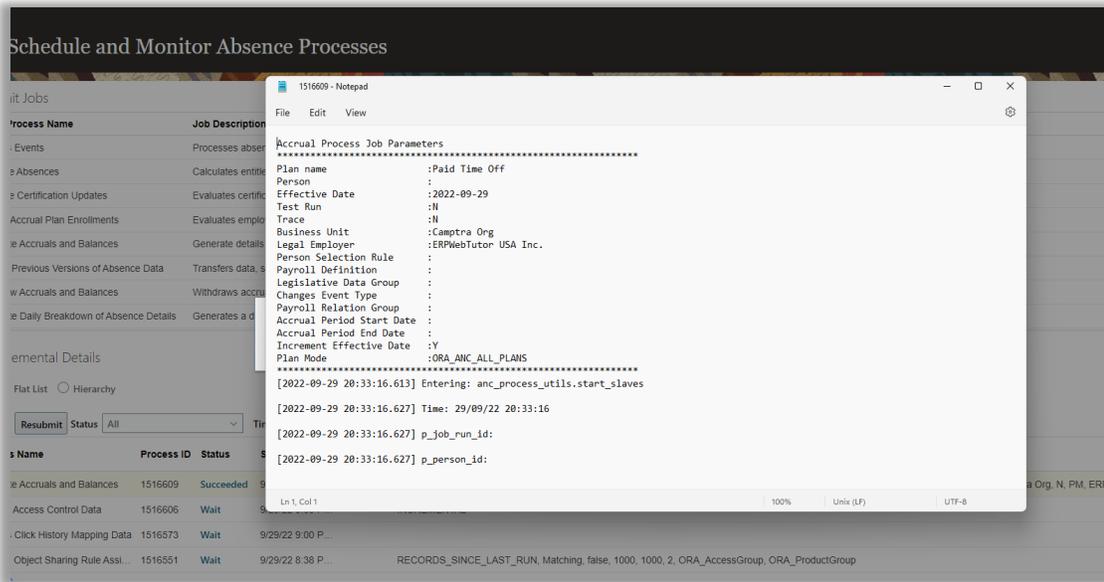
Click **Create** and enter the **Create Notification** details and Click **OK**



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



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



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](mailto:learn@camptratech.com)

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