Manager Self Service Essentials Script

Overview

Welcome to Manager Self Service Time and Absence Essentials. Before we begin, we'd like to discuss some new concepts and terminology that will be used throughout the HCM System.

There are three standard roles when working in the HCM System: Employee Self Service (or ESS), Timekeeper, and Manager Self Service (or MSS).

As you know, all CCSD employees have access to the ESS role, which allows them to request absences, report time, update contact details, change benefit information, and so on.

The Timekeeper role provides the ability for another person to enter an employee's time and absences. This means that the Timekeeper can complete the same functions as an employee when it pertains to Time Reporting and Requesting Absences.

Although the most efficient method when it comes to Time and Absence is to have the employee submit and account for their own information, circumstances may arise in which the Timekeeper may have to step in on behalf of the employee. Examples would include making changes to incorrect Timesheet entries, submitting an Absence Request when the employee is unable to, and entering a Time Reporting Code (or TRC) that is necessary but not accessible by the employee. Timekeepers also have the ability to look up important personal information, such as addresses and contact details, for employees at their site.

Employees who have only Timekeeper Portal access do not have the ability to approve Reported Time or Absence Requests.

MSS Introduction

The HCM System provides a Manager Self Service (MSS) Portal designed to assist administrators, managers, and other designated staff with the ability to:

- Enter Time or submit Absence Requests on behalf of employees at their school or work location;
- View employees' submitted Time, Absences, Absence Balances, et cetera;
- Access an at-a-glance view of their school or work location's scheduled employees, requested absences, et cetera;
- Locate and view personal and employment data for their location's employees;
- Create job requisitions in the HCM System's Talent Overview program, Taleo;
- Request new and make changes to existing positions; and
- Access to the School Budget Planning Tool.

Accessing MSS and Dashboard Overview

To access MSS, you must first log into the HCM System using your Active Directory (AD) credentials. Even though you have elevated access in the system, you will still automatically be brought to the Employee Self Service homepage after logging in.

To switch to MSS, click the top menu, and choose Manager Self Service from the dropdown list. Although the Dashboard shown has different tiles than those in ESS, the navigation buttons in the top right corner are the same.

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Disclaimer

Throughout the HCM system, you will find that there are often multiple ways to complete different tasks. The methods that you are shown throughout the course of this training video are considered best practices in MSS, especially when requesting absences and reporting time Because of this, not all features on each screen will be addressed.

Time / Absence Approval

Because the approval of Time and Absence is critical in the District, this training will focus on reporting Time, submitting Absence Requests, and the approval process.

As you learned from the HCM ESS Essentials video, there is a difference between Time and Absence in the HCM system.

Time is the accumulation of time worked, which is your regularly scheduled work day as well as any additional time, and Absence, which is earned or deducted based on employee negotiated agreements.

Examples of Time include Overtime or Extra Pay. Examples of Absence include Sick, Vacation, or Personal Leave. Comp Time is unique in that both Comp Time Earned and Comp Time Taken qualify as Time. This is because Comp Time cannot be taken without having first been earned. In short, comp time is not contractual.

This also applies to the workflow that they follow.

Time and Absence and Payroll require a Reviewer and a Final Payroll Authorization Approver.

There are two levels of approval: Level 1 Reviewers and Level 2 Approvers. Level 1 Reviewer and Level 2 Approver access applies only to the Time and Absence workflow in MSS.

Reviewers are considered to be Level 1 of the approval workflow, and may include employees such as:

- Administrative School Secretaries and Office Managers at a school, department secretaries, location managers or supervisors; and
- Employees who have staff who “report to” them as identified in the system’s organizational structure. For example, at a school, all employees report to the Principal, so by default, the Principal will have Level 1 Reviewer rights.

Final Payroll Authorization Approvers are considered Level 2 of the approval workflow. These are Administrators such as Principals, Department Directors, and so on.

Please note: It is possible to have more than one Level 1 Reviewer and Level 2 Approver.

Reported Time (such as Overtime and Comp Time Earned) and Absence Requests (such as Personal Illness or Vacation) are routed to the Reviewer for initial approval. The Final Payroll Authorization Approver submits the Reported Time or Absence Requests to Payroll by approving at Level 2.

In many cases, a principal, director, etc. will be assigned Level 1, as they have employees who report to them, AND Level 2 as the Final Payroll Authorization Approver.

There are various resources available to further explain the differences between the Standard Roles in the HCM System, as well as the user security setup within the system based on those roles. Please visit training.ccsd.net to view these resources.

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Absence Request Approval

Let's first take a look at Absence approval. As previously stated, an Absence Request submitted by an employee or Timekeeper will route to the Level 1 Reviewers, such as the Office Manager, for screening and initial approval.

To review and approve an Absence Request submitted by an employee or Timekeeper, the Level 1 Reviewer clicks on the Approvals tile. The number on the Approvals tile indicates the total number of pending requests.

When brought to the Approvals tile, click on the Absence Request option to see only the Absence Requests pending Level 1 approval. Each Request displays the Employee Name, Absence Name, Duration, Start and/or End Dates being requested, and the date on which the Request was routed.

The Level 1 Reviewer can then select the desired Request and review the information for accuracy. Information shown includes any Partial Days being requested, the employee's current balance of that specific leave type, and any Requester Comments the employee may have added. Clicking on Additional Information will show whether or not the Absence Request includes FMLA coding. Request History displays a history of any activities that have taken place in this Absence Request. Approval Chain displays the request's Absence Approval Paths, any Approvers involved, and the status of each step of the approval process.

The Approver Comment box can be used to add comments. Please note that these comments are viewable by the employee and any users with access to the Absence Request. Comments cannot be modified or deleted once submitted.

There are two action buttons that are available: Approve and Pushback. Clicking the Approve button will route the Absence Request to the Level 2 Approver.

Clicking the Pushback button will route the Absence Request back to the affected employee (whether it was submitted by the employee or by someone else on their behalf, such as the Timekeeper). This is used if and when the Absence Request contains a mistake, or to communicate to the affected employee that the Absence Request cannot be approved at this time (such as accounting for minimum staff coverage).

For example, a Timekeeper might submit an Absence Request on behalf of an employee, but the Request contains the wrong dates. In this scenario, the Approver Comments box could be used to specify the mistake made in the original Request as part of the Pushback process. This will allow for the affected employee to correct the mistake and then re-submit the Request for Level 1 approval.

Let's click Approve.

(Remember: It is possible for one location to have multiple Level 1 Reviewers. If any Level 1 Reviewer screens and approves the Request, it will move on to the Level 2 Approver.)

The approval workflow then sends the Absence Request to the Level 2 Approver, meaning the Principal or Department Administrator. To view and approve the Absence Request, the Level 2 Approver will also click on the Approvals tile and select the Absence Request option.

Level 2 Approvers have the ability to select and approve multiple Absence Requests at once. However, this functionality should be used with caution. If a Level 2 Approver who also has Level 1 access approves any Absence Request without it first being approved by their designated Level 1 Reviewer, the Request will skip the Level 1 Reviewer in the approval process. By selecting Absence Requests individually, the Level 2 Approver can click Approval Chain to see if their Level 1 Reviewer has approved the Request.

If an Absence Request has been approved by the Level 1 Reviewer and/or the Level 2 Approver, the employee can still cancel the Absence Request. The cancelation then follows the same approval workflow: It is routed to Level 1 for review, and then Level 2 for final payroll authorization. Cancelations must be approved to ensure that leave requested matches leave actually taken.

When a cancelation is submitted, the type shows as Cancel Absence in the Approvals tile. Click the Cancel Absence request to view more details. Clicking Approve will route the cancelation request to the next level of the approval workflow. Clicking Deny will route the request back to the employee.

Reported Time Approval

Now let's focus on Reported Time approval. As discussed, any Reported Time submitted by an employee or Timekeeper is routed to the Level 1 Reviewer for screening and initial approval, then the Level 2 Approver for final payroll authorization.

Note: If an employee reports time that will be paid through an alternate funding source (meaning a funding source that is not the employee's default), the Reported Time will be routed to the Level 1 Reviewer and Level 2 Approver for that funding source. An example could be an employee working Overtime for another school or department.

The Reported Time option shows Time submitted by employees or Timekeepers. Examples include Overtime for a support professional, extra instruction for a certified teacher, and regular time entered for a temporary employee.

Click on an approval to view more details.

The Summary area displays the Time Period for which the Time has been entered, the quantity of hours or days to be approved, the quantity scheduled, and so on. The Reported Time Details show the date on which the Time was reported, the TRC that was used, and the Quantity for Approval. To the left of each row is a selection box that must be checked in order to choose which rows are to be Approved or Pushed Back. Like Absence Requests, there is an Approver Comments box available.

Click Approve to route the Reported Time to the next step in the approval workflow. Click Pushback to send the Timesheet back to the employee for corrections if necessary. If you click the arrow button on a row, there is also an Adjust Reported Time option available. We will discuss how to make adjustments and corrections to Reported Time during the Timesheet Entry portion of this training.

General Approvals Information

You may have noticed that, when brought to the Approvals tile, there is a View By dropdown. Each option changes the way the information is displayed. The options listed are Date Routed (which sorts by the date on which the Request was submitted), From (which shows the name of the person who created the Request in the left-side panel), the Requester (which shows the employee name in the left-side panel), or the Type (either Absence Request, Reported Time, or Cancel Absence).

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Timesheet Entry

Let's move on to the Timesheet Entry tile.

Timesheet Entry can be used by both Level 1 and Level 2 users in MSS. This tile allows you to locate and select an employee in order to enter time on their behalf, as well as view any Time that they may have reported. Please note that Absence Requests on an employee's behalf are submitted using the Team Time and Absence tile, not through Timesheet Entry.

Clicking on this tile brings you to a search page, where you will search for employees by criteria such as Last Name, First Name, and Employee ID. After entering the desired criteria, click Get Employees to search. The search results will display beneath the search area at the bottom of the page. The Change View area allows you to view by week or day, to change the date being searched, to show or hide the employee's schedule information, and to look at previous and future weeks.

Click an employee's last name to select them. This will bring you to the employee's Timesheet. You may use the Select Another Timesheet area to change the view of the Timesheet shown, as well as to choose a different date or week in which to view the Timesheet.

The grid shown will display any Time that may have been reported by or for the employee in the timeframe given. For example, a Certified teacher may show one hour of Extra Instruction per day in a given work week. You will also see any Absence Requests that may have been submitted within this timeframe, but they will appear as a non-modifiable row.

You have the ability to modify, add, or remove Time that is being reported using the Timesheet. Simply make any necessary changes in the grid, and then click Submit to report the Time on behalf of the employee.

You may also use Save for Later to enter and save Time without submitting it.

Timesheet Entry Examples

As with the Timesheet that is available in ESS, the Plus button on the right will add a blank row, which allows you to enter multiple values or TRC's on the same date. This is also used when entering Reported Time for a support professional or school police employee, because you must always insert a row to account for their regular hours when reporting Time. If you are entering Time for a unified or certified employee, you do not need to insert a row to account for the employee's regular hours.

[EXAMPLE 1: OVERTIME]

For our first example, you will enter two hours of Overtime for an 8-hour support professional employee. First, enter a row to account for their regular hours worked. Enter 8, and use Regular Hours as the TRC.

To account for the Overtime hours worked, click the Plus button on the right to add a row. In the additional row, on the same date, enter 2 as the value. You will still use the Regular Hours TRC to indicate the Overtime. As you will recall from the ESS Essentials video, there is no "Overtime" TRC because the HCM System calculates the correct rate automatically.

When finished, click Submit. You will receive confirmation that the submission was successful.

[EXAMPLE 2: ADDITIONAL MINUTES]

In our next example, you will enter Additional Minutes for a certified teacher. This particular teacher works 29 additional minutes each work day.

Because the Timesheet uses hours, any value that is less than an hour must be entered as a decimal. 29 minutes equates to .49. Enter .49 as the value for each day of the work week: Monday through Friday. Because these will all be using the same TRC, you can enter them all in the same row.

Select Additional Minutes as the TRC. Click Submit when finished.

[EXAMPLE 3: POSITIVE PAY]

Time for Positive Pay employees, such as a temporary worker or student employee, is also entered in the Timesheet. Let's say that this employee works 3.9 hours a day.

Enter the hours they worked each day.

For a Temporary employee, the only TRC available is Regular Non-PERS. Select the TRC and click Submit when finished.

Beneath the Timesheet grid, you will see a series of tabs.

The Reported Time Status tab displays any Time that has been reported by or for the employee in the given timeframe, and gives you the ability to add Comments. (Please note that you must submit the Reported Time before you can add a comment.)

The Summary tab breaks down any Reported Time into categories.

The Absence tab gives a view of any Absence Requests that may have been submitted by or for the employee in the given timeframe.

Use of the Add Absence button in this tab is not recommended.

The Timesheet can also be used to submit Reported Time that is being funded through an alternate source.

[EXAMPLE 4: ALTERNATE FUNDING]

In the next example, you will enter 2 hours of Overtime for an 8-hour support professional employee, but the Overtime is being paid by a different location. Because the employee is a support professional, first enter a row to account for their regular hours at their regular location.

Click the Plus button to add another row. Enter the value 2 for the same date with the TRC of Regular Hours.

Scroll to the right. There are several blank fields in each row. The two fields that indicate whether or not the Reported Time is funded through an alternate source are Location and Combination Code. Location identifies the location code that is funding the Reported Time. Combination Code is used to indicate the specific budget coding.

In our example, only the Overtime is being funded through another location. Leave the Location and Combination Code fields blank for the row of 8 regular hours. In the row of 2 regular hours, enter the appropriate location code in the Location field, and the budget coding in the Combination Code field.

Click Submit when finished. The Location and Combination Codes entered will ensure that the Overtime is routed to the appropriate Level 1 Reviewer and Level 2 Approver for the location that is funding the Time.

Although most Reported Time for an employee that will be paid from an alternate funding source will be entered through the HCM System, there may be instances where additional time will need to be entered in SAP using the electronic C5 form. These include paying participants for attending a training that was advertised through the ELMS system, extra duty that is part of the mentor log, or extra duty paid with Grant funding.

It is important to note that when a Level 1 Reviewer or Level 2 Approver uses Timesheet Entry to report Time on behalf of an employee, the Reported Time is automatically routed to the next level of the approval workflow.

For example, if an Office Manager (who is a Level 1 Reviewer) submits an hour of Overtime for an employee, the Office Manager will not need to go to the Approvals tile to approve the Reported Time after submitting. This is because Level 1 approval has already been granted upon clicking Submit. However, it will still need to be given approval by the Level 2 Approver.

Team Time/Absence

Overview

The Team Time and Absence tile is where Level 1 Reviewers and Level 2 Approvers can submit Absence Requests on an employee's behalf, cancel existing Absence Requests, view a history of Absence Requests for each employee, access a daily or weekly view of all employees' Reported Time and Requested Absences, and more.

Report Time

Although Report Time can be used to enter Time on an employee's behalf (similar to the Timesheet), it will only allow you to enter one date at a time, and does not feature the ability to add multiple rows at once. Therefore, it is recommended that you use the Timesheet Entry tile when entering Time for an employee.

Weekly Time Summary

Weekly Time Summary provides a view of any Reported Time for an employee in a given week.

Payable Time

This tool is used to view Payable Time for an employee after Time Administration has been run.

Comp Time Balances

The Comp Time Balances option allows you to select an employee and view any Comp Time they may have earned.

Request Absence

The Request Absence tool is used to create Absence Requests on behalf of an employee. To begin, check the box next to an employee's name and click Continue.

Please note that you cannot submit an Absence Request for multiple employees at once.

After selecting an employee, the Request Absence screen will be similar to the Request Absence option that is available in ESS. Choose an Absence Name and fill out all required fields. You will also need to click Check Eligibility before the Absence Request can be submitted.

One key difference in the Request Absence option in MSS is the Workflow area. This shows a "Request As" dropdown with two options: Employee or Manager. Use the "Manager" option to indicate that you are initiating the Request. Use the "Employee" option if and when the employee asks you to enter the Absence Request on their behalf.

The Comments field can be used to enter a justification for the submission of the Absence Request.

Click Submit when finished.

As with submitting Time on an employee's behalf, submitting an Absence Request for an employee will automatically route the Absence Request to the next level of the approval workflow. For example, a Principal can submit a day of sick leave on behalf of a teacher. The Principal's Level 2 access would automatically grant final payroll authorization to the Absence Request, and they would not need to return to their Approvals tile to approve it.

Cancel Absences

Cancel Absences is used to cancel any existing Absence Requests on behalf of an employee. The Search area can be used to locate a specific employee. Select the employee to view any Absence Requests that are eligible for cancelation. This will display any Requests that may have already been approved, including those from prior pay periods.

Select the desired Request. More details will be available for your review. Click Cancel.

Canceling an Absence Request follows the same approval workflow as entering Reported Time or submitting an Absence Request on an employee's behalf. Once the Request has been canceled by a Level 1 or Level 2 user, the cancelation is routed to the next level of the approval workflow.

Canceling a Request may be a useful alternative to using "Pushback" in the Approvals tile. As stated, Pushback sends the Absence Request back to the employee. If the employee is unable to make the changes through their ESS, you may cancel the Absence Request and then resubmit on their behalf.

View Requests

View Requests allows you to see a history of Absence Requests submitted by or on behalf of an employee. The list will include any Requests regardless of the status. Because this is a view-only tool, Absence Requests cannot be approved, pushed back, or canceled from View Requests.

Absence Balances

Absence Balances allows you to select an employee and view their current leave balances. You can also use the Forecast Balance tool to predict how much of a certain leave type the employee will have accrued by a future date.

Manage Exceptions

As discussed in the ESS Essentials video, an exception occurs if Time is entered that may not be valid. Manage Exceptions is used to view any outstanding Exceptions for the site.

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If an Exception appears under the Fix tab, the Exception must be corrected on the employee's Timesheet before the Reported Time can be routed for payroll authorization. If the Exception appears under the Allow tab, the Reported Time can be allowed so as to be routed for payroll authorization.

The total number of exceptions is displayed on the Team Time and Absence tile.

Reporting Locations

Reporting Locations can be used by MSS users with employees at multiple locations.

Workforce Availability

The Workforce Availability tool provides both a daily and weekly view of all scheduled employees at your site, as well as any Reported Time and/or Absence Requests that they may have in the HCM System.

After clicking on the option, the Team Time and Absence menu on the left will collapse and appear as a yellow ribbon on the left side of the screen, and a new panel of options appears. However, the default Team Time and Absence menu is still present. Clicking on the yellow ribbon expands the original menu.

By default, the calendar shown is set to a Daily Time view, but this can be changed to Weekly Time. Once the daily or weekly view is chosen, you can toggle through the different dates or date ranges shown by clicking on the left and right arrow buttons at the top of the screen. You can also choose a specific date by clicking on the word Today (while in the daily view), or the date range (while in the weekly view).

In the Daily Time view, you will see a list of all employees at your location for the given date, as well as a timeline at the top of the page. If an employee has any time off or Reported Time, there will be verbiage indicating this next to the "Elapsed Reporter" label, and you will be able to select that particular employee to view the details.

(For example, if you click on an employee showing "Time Off", the Absence Name, Duration, and Balance will display when their row is selected.)

In the Weekly Time view, the employees at the site will still display on the left, but instead of times, the days of the week are displayed. Color coding in each row corresponds to the Time or Absence being indicated (for example green for Regular Time and brown for Time Off).

In the additional menu that now appears on the left side of the page, there are options that, when clicked, can change the information that is displayed. Scheduled will show the total of all employees that are scheduled to work during the day or week being shown. Schedule Deviation will display any differences between scheduled and actual hours.

Away from Work is an expandable menu that allows you to choose to view only specific types of Absences: Unapproved Absence (an Absence Request that has been submitted but not approved), Approved Absence (any Absence Requests that have already gone through the Approval process), Training, and Comp Time Off.

There is also a Filter button at the top of the menu that can be used to enter additional filter criteria, such as a specific work group, an individual employee's name, and so on. The Refresh button can be clicked to ensure that any newly submitted Absence Requests and/or Reported Time are being reflected in the Workforce Availability screen.

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Effort Certification

Effort Certification is used to monitor federally-funded CCSD employees, who are required to use the Employee Effort Certification feature in ESS.

My Team

The My Team tile can only be accessed by MSS users who have Direct Reports in the HCM System. This tile will display general employee information (such as their Department and Location, contact information, et cetera), as well as Compensation information and Leave Balances.

If the tile is clicked by an MSS user who does not have any Direct Reports, no employee data will be shown.

View Employee Personal Info

The View Employee Personal Info tile allows you to view information for employees at your school or work location. Click the Select button next to an employee's name to see their basic Job and Personal Information (such as their Employee ID, Position, or Job Code).

You can also select to view the employee's home and mailing addresses, email addresses, phone numbers, emergency contacts, or birthday.

Conclusion

This concludes the Time and Absence Essentials portion of HCM Manager Self Service training. More specific examples of Time and Absence entry and supplemental training resources (such as documentation regarding Taleo, the Position Request tile, the CCSD Budget Planning tool, and so on) can be found on training.ccsd.net as they become available.