

Absence Management for Employees

For All Employees eligible for some form of paid time off

Intro

Purpose:	To submit, edit or delete an absence request in Bear Trax.
How to Access:	From the Navigator, under “Me” select “Personal Information.” Click the arrow to the right of My Details. Select Absences and then Manage Absence Records.
Helpful Hints:	Be sure to keep in mind that... <ul style="list-style-type: none"> • The request process includes a workflow. Your absence request is subject to Manager approval. • You must use the Advanced mode if you have <i>multiple assignments</i> (more than one job at SSU). • You can only request time off that you have accrued. (The system will stop your request if you do not have the leave balance accrued.) <ul style="list-style-type: none"> • You can view all pending or approved absences. • You can view your current absence balances and project your balance calculations into the future. • Absence and Time modules are integrated. If you use Bear Trax to track your time worked, submit your absence requests <i>before</i> submitting your time card. Once an absence is submitted and approved it will appear in your time card.
Procedure:	Complete the following steps to submit an absence:

Overview:

All absences, including same day absences, must go through absence management. **The only exception is Comp Time Used which is logged in Time Entry.**

Employee time worked drives absence accruals. Once an absence request is submitted and approved it will appear in your time card (if applicable). Note! You **must** enter your absences first before finalizing your time entries so that the absences appear in your time card.

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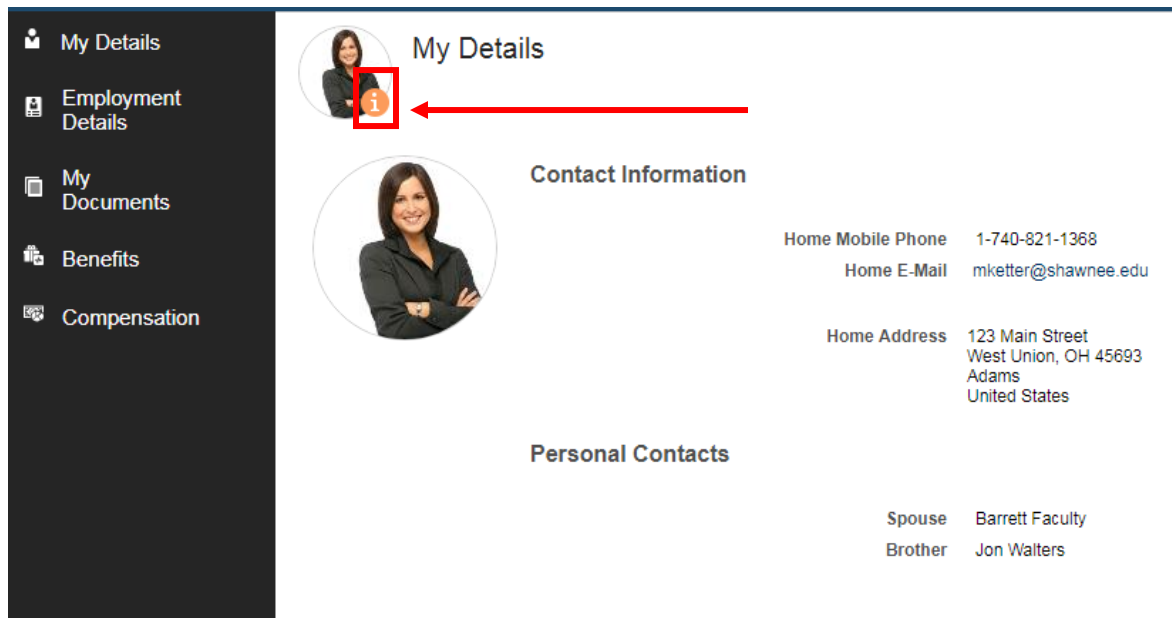
Delete an absence record [Part Five](#)

Part One: Request Time Off—For Employees with a Single Assignment (One Job)

Employees can request absence time subject to manager approval and available balance.

Follow these steps to request time off:

Navigate to Personal Information and click the information icon  to the right of My Details to view dropdown menu.



My Details

Contact Information

Home Mobile Phone	1-740-821-1368
Home E-Mail	mketter@shawnee.edu
Home Address	123 Main Street West Union, OH 45693 Adams United States

Personal Contacts

Spouse	Barrett Faculty
Brother	Jon Walters

Select Absences and then Manage Absence Records.

My Details

Test Faculty
Assistant Professor, Business Administra...

40-821-1368
etter@shawnee.edu

Main Street
t Union, OH 45693
ms
ed States

rett Faculty
Walters

Recent Actions

- Absences**
- Compensation
- Payroll
- Personal and Employment

Manage Absence Records

Click here first

Click here second

Click the “+” Add button.

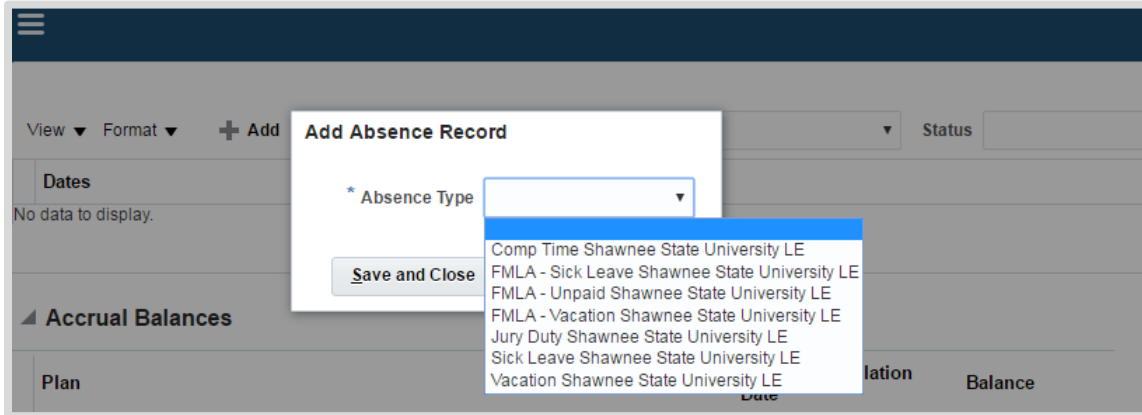
View Format **+ Add** Dates Last six months Absence Type Status Done

Dates	Absence Type	Duration	Status	Delete
4/11/17 - 4/12/17	Sick Leave	16 Hours	Awaiting approval	X

Accrual Balances

Plan	Balance Calculation Date	Balance
Sick Leave Plan - Non Faculty	4/7/17	152.34 Hours
Vacation Plan - Support and Admin	4/7/17	209.1 Hours

Select the Absence Type from the drop-down list.



Complete fields in the Details form, including required fields marked by asterisk.

Add Absence Record

* Absence Type Sick Leave Shawnee S

Details Advanced Mode

Single day

* Start Date 5/15/17 📅 End Date 📅

Start Date Duration 8 Hours End Date Duration Hours

Duration 8 Hours Balance 📊

Reason

Comments Disability Doctors appointment

Mental Health Day

Add Attachment None +

▲ Legislative Information

Context Segment

▲ Descriptive Information

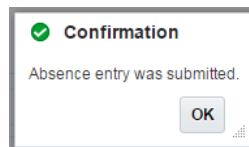
Context Segment

No information is added in these sections

Save and Close ▼ Submit Cancel

Absence (ESS): Absence Management for Employees

- a. Choose the Start & End Date. *Note!* If you click the checkbox for Single Day, the End Date is deactivated.
 - i. Start & End Date Durations automatically populate according to your working hours. If you are requesting a partial day off, adjust the hours accordingly.
- b. Select Reason (required for some absences).
- c. Add any necessary comments. *Note!* Comments should remain general and without detail. I.e.: medial appointment.
- d. No action is needed in the Legislative and Descriptive Information fields.
- e. Click “Submit” to submit the request for manager approval. A confirmation will appear.

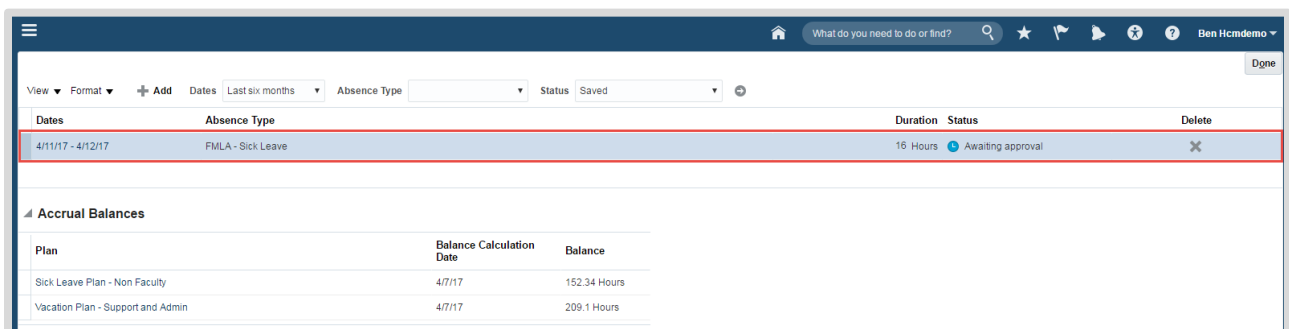


Other possible actions include:

Click “Save and Close” to save the request to submit at a later time for manager approval.

Click “Cancel” to cancel the transaction and not save it.

View the absence request and its status on your Absence page



Dates	Absence Type	Duration	Status	Delete
4/11/17 - 4/12/17	FMLA - Sick Leave	16 Hours	Awaiting approval	X

Accrual Balances		
Plan	Balance Calculation Date	Balance
Sick Leave Plan - Non Faculty	4/7/17	152.34 Hours
Vacation Plan - Support and Admin	4/7/17	209.1 Hours

Part Two: Request Time Off: Advanced Mode—For Employees with Multiple Assignments (2+ jobs)

Advanced Mode is used to enter a different number of hours for a range of dates and for employees with variable work schedules or multiple assignments (multiple positions).

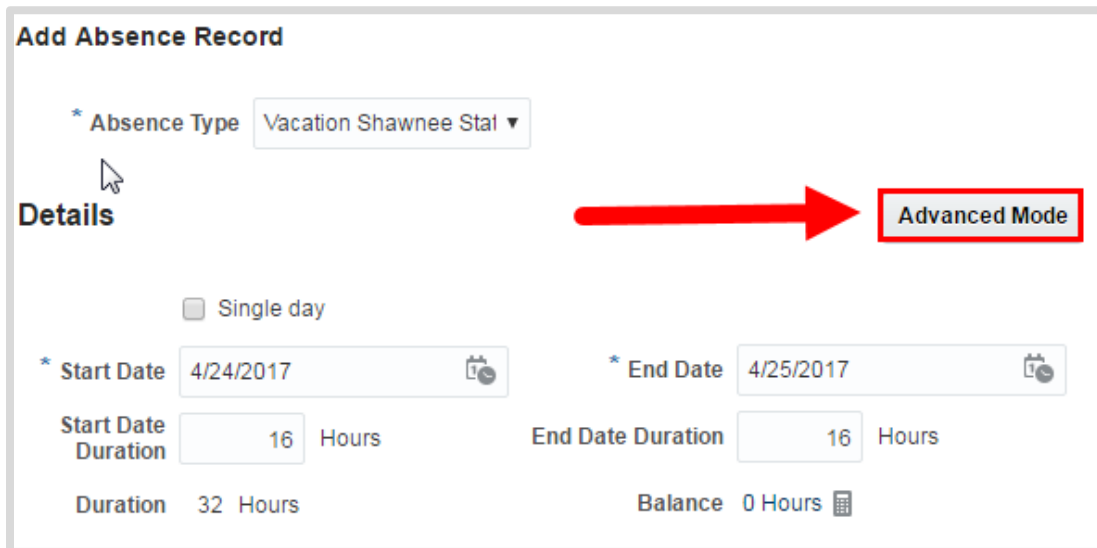
Follow these steps to request time off using the Advanced function.

Starting from the Manage Absence Records page:

Click the “+” Add button.

Select Absence Type from the drop down list.

Click Advanced Mode from the Add Absence Record window.





Add Absence Record

* Absence Type ▼

Details

Single day


* Start Date 

* End Date 

Start Date Duration Hours

End Date Duration Hours

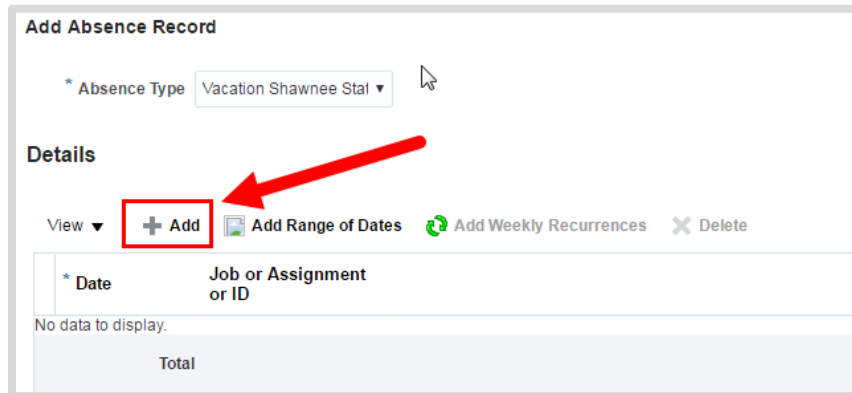
Duration Hours

Balance Hours 

Note: If you have multiple assignments you **must** use Advanced Mode when submitting an absence. **If you do not, the time off request will be charged to all assignments**, increasing the leave time beyond what is necessary to charge.

View the Advanced Mode Form and complete the following steps to submit an absence:

- a. Click the “+” Add button to enter your time off request.



Add Absence Record

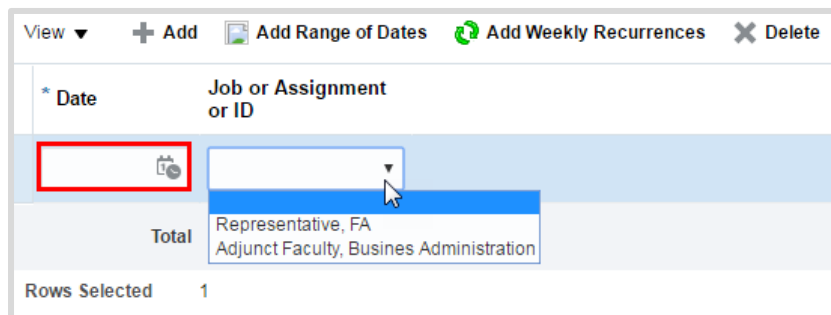
* Absence Type: Vacation Shawnee Stat

Details

View ▾ **+ Add** Add Range of Dates Add Weekly Recurrences Delete

* Date	Job or Assignment or ID
No data to display.	
Total	

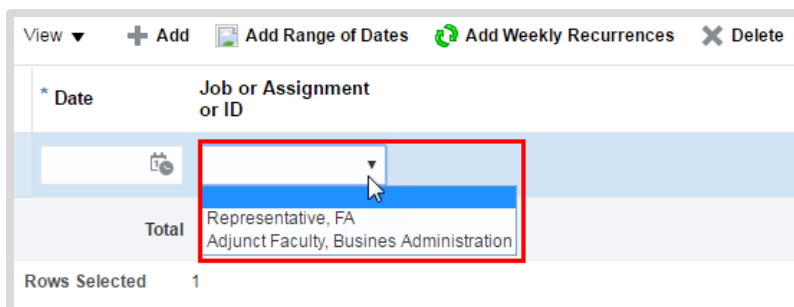
Select the Date



View ▾ + Add Add Range of Dates Add Weekly Recurrences Delete

* Date	Job or Assignment or ID
<input type="text" value=""/>	<input type="text" value=""/>
Total	
Rows Selected 1	

Select the Assignment (job) for which you are taking time off.

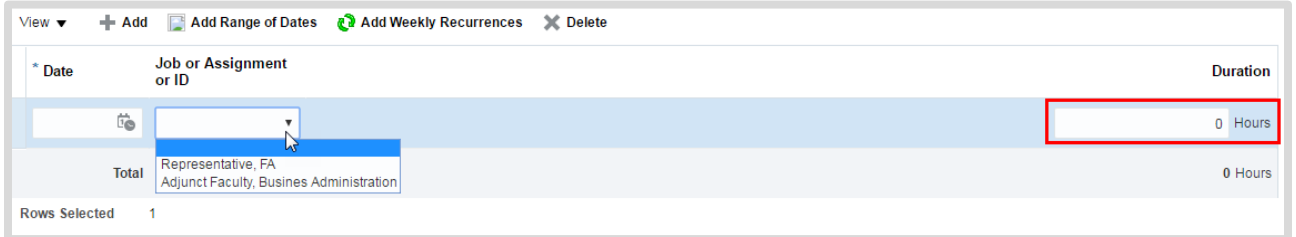


View ▾ + Add Add Range of Dates Add Weekly Recurrences Delete

* Date	Job or Assignment or ID
<input type="text" value=""/>	<input type="text" value=""/>
Total	
Rows Selected 1	

Absence (ESS): Absence Management for Employees

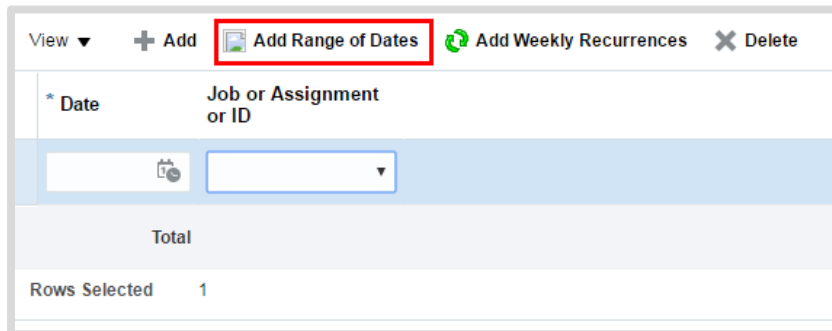
In the box on the right, enter the number of hours you are taking off. (I.e.: 8 hours).



* Date	Job or Assignment or ID	Duration
<input type="text"/>	<input type="text"/>	<input type="text" value="0"/> Hours
Total		0 Hours

Rows Selected 1

b. To add multiple dates at a time, click Add Range of Dates.

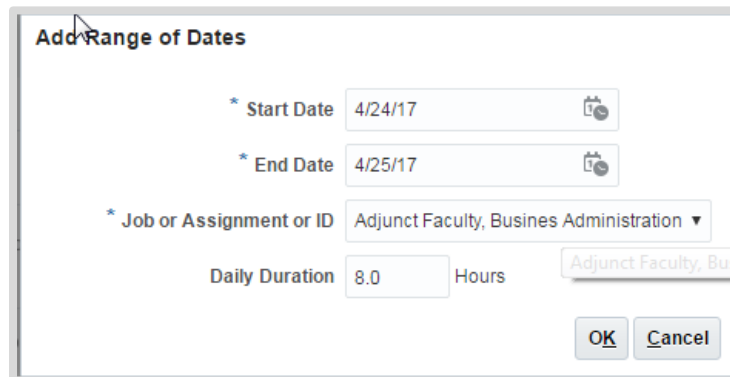


View ▾ + Add **Add Range of Dates** Add Weekly Recurrences X Delete

* Date	Job or Assignment or ID
<input type="text"/>	<input type="text"/>
Total	

Rows Selected 1

i. View the Add Range of Dates form and complete the required fields.



Add Range of Dates

* Start Date

* End Date

* Job or Assignment or ID

Daily Duration Hours

Enter the start date and end date in the format MM/DD/YY.

Select the Job or Assignment for which you are requesting time off.

Enter the duration of hours for the days (I.e.: 8 hours).

Enter the reason for the absence type, if prompted. Reason and comments should remain general and without detail. (I.e.: medical appointment)

ii. Click “OK” to populate each date into the Advanced Mode screen.

iii. Review all entered absences. You can also edit or delete entries from here.

View ▾ + Add Add Range of Dates Add Weekly Recurrences Delete

* Date	Job or Assignment or ID	Duration
4/24/17	Adjunct Faculty, Bu: ▾	8 Hours
4/25/17	Adjunct Faculty, Bu: ▾	8 Hours
Total		16 Hours

1. To edit the individual entry, change the date, assignment, or duration.

2. To delete the individual entry, click the entry’s row and then click the X “Delete” button.

i. Click “Submit” to submit your entered absences for approval.

Edit Absence Record

Status: Saved

* Absence Type: Vacation Shawnee Stat ▾

Details Basic Mode

View ▾ + Add Add Range of Dates Add Weekly Recurrences Delete


* Date	Job or Assignment or ID	Duration
4/24/17	Adjunct Faculty, Bu: ▾	8 Hours
4/25/17	Adjunct Faculty, Bu: ▾	8 Hours
Total		16 Hours

Remaining Balance: 0 Hours

Comments:

▲ Legislative Information
 Context Segment ▾

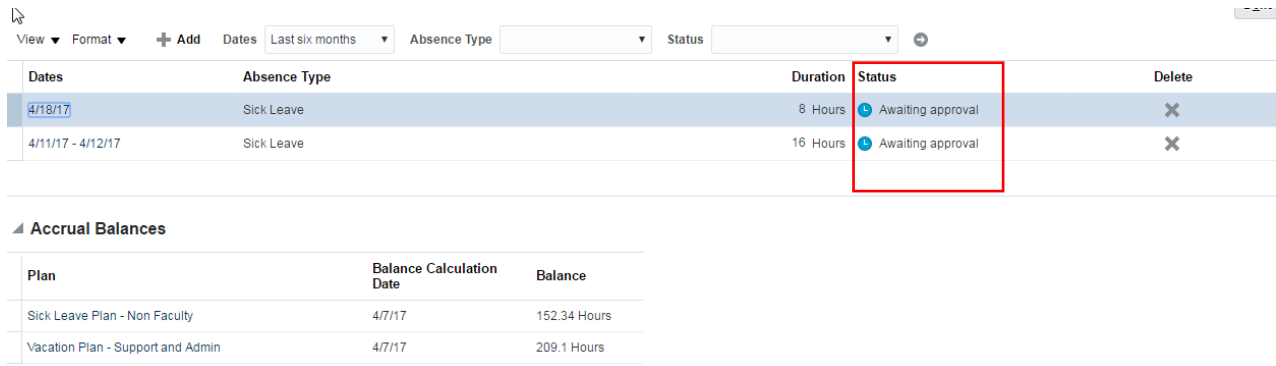
▲ Descriptive Information
 Context Segment ▾



Part Three: View the status of an Absence Request

Follow these instructions to view the status of your absence report:

1. Navigate to the main Manage Absence Records screen.
2. Note the Status column.



Dates	Absence Type	Duration	Status	Delete
4/18/17	Sick Leave	8 Hours	Awaiting approval	✕
4/11/17 - 4/12/17	Sick Leave	16 Hours	Awaiting approval	✕

Plan	Balance Calculation Date	Balance
Sick Leave Plan - Non Faculty	4/7/17	152.34 Hours
Vacation Plan - Support and Admin	4/7/17	209.1 Hours

Part Four: Edit an Absence Record

Follow these instructions to edit an absence request:

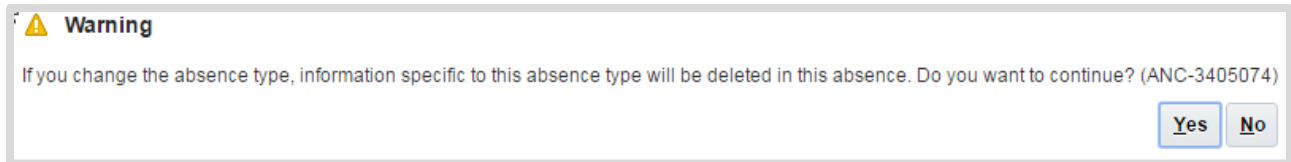
1. Navigate to the main Manage Absence Records screen.
2. Click on the date of the absence you wish to edit.



Dates	Absence Type	Duration	Status
4/18/17	Sick Leave	8 Hours	Awaiting approval
4/11/17 - 4/12/17	Sick Leave	16 Hours	Awaiting approval

3. View the Edit Absence Record and edit your absence request as needed.

- a. If the Absence Type is changed, a warning will appear informing you that the previous absence information will be deleted.



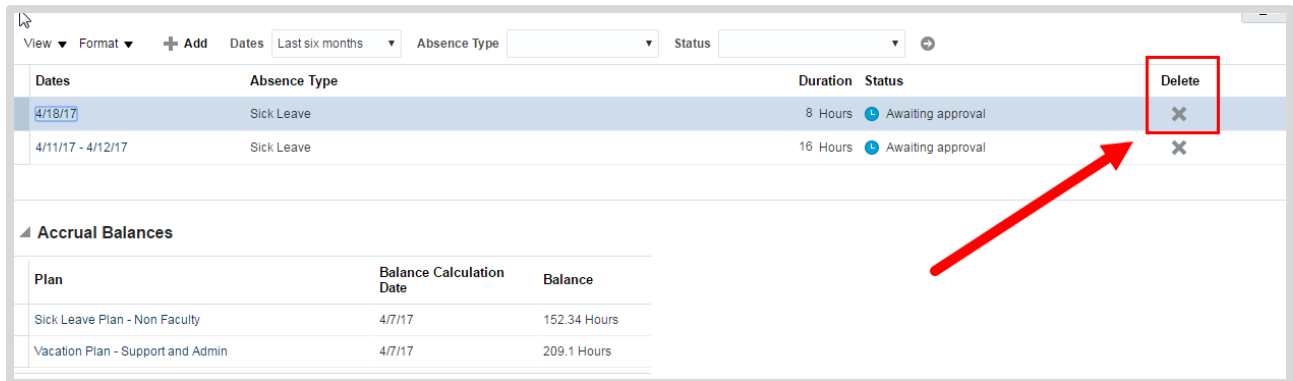
- b. Select Yes if you want to continue.
- c. Reenter date and reason. (This is required when editing an Absence Type)
 - i. When you change dates, the duration will change automatically.
 - d. Add a comment documenting the reason for the change.
- e. Skip the Legislative and Descriptive Information fields; no action is needed.
- f. Click Submit to submit the request for manager approval. A confirmation appears.

Note: If you edit an absence request after you've submitted your timesheet, you must resubmit your timesheet. If you do not, the timesheet defaults back to "saved" status and will not be submitted to Payroll for processing.

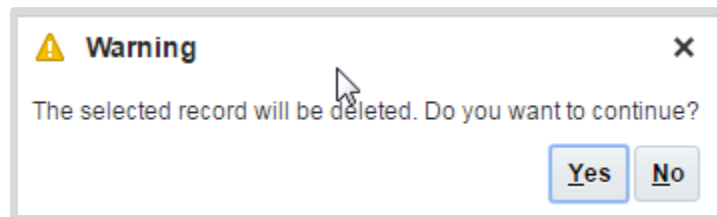
Part Five: Delete an Absence Request

To delete a pending, approved or completed absence request:

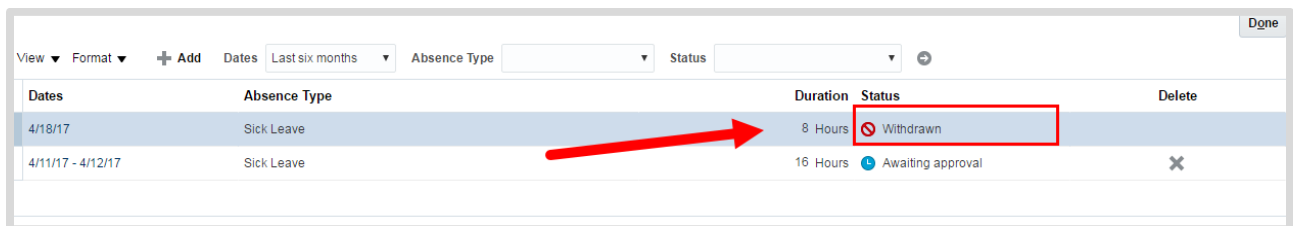
1. Navigate to the main Manage Absence Records screen to locate the pending request
2. Click the “X” in the Delete column for the absence you want to delete.



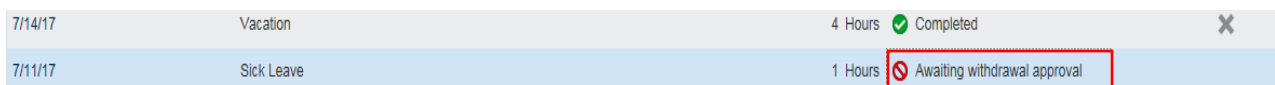
3. Click “Yes” in the popup window to confirm deletion of your pending request.



4. View your updated Manage Absence Records screen to see that your request status now says “Withdrawn.”



When deleting an absence record that was previously **approved and completed**, the status will display as “Awaiting withdrawal approval” as your supervisor will have to approve the deletion.



Final Notes

By following these instructions, you can successfully submit absence requests, edit and delete absence requests and view your current and projected absence balances.