

Manager (MSS): Manage Workers' Absence

For Managers of Direct Reports

Intro

Purpose:	<p>Manage employee absence records in Bear Trax including:</p> <ol style="list-style-type: none"> 1. Review, approve and reject absence requests, 2. View employee absence balances, 3. Enter absence requests on behalf of a direct report, and 4. View the availability of your team.
How to Access:	<p>Access employee absence requests from your Notification bell.</p> <p>Access employee absence balances & Manager Dashboard from Team Compensation.</p>
Helpful Hints:	<p>Be sure to keep in mind that...</p> <ul style="list-style-type: none"> • Absence request and approvals follow a prescribed workflow. • Employees can only submit absence requests for time they have already accrued in their time off balance. • If managers are unable to respond to employee requests you must temporarily reassign approvals to another appropriate employee. • Employees with multiple assignments must use Advanced Mode. • Employees using time cards should submit absence requests before submitting time worked. Submitted absences will automatically appear in the time card.
Procedure:	<p>Follow the steps below to review absence requests, view employee absence balances and more...</p>


Table of Contents

Bear Trax is used to track and approve absence requests for all employees with absence balances. Use the table below to quickly navigate to the Manager Absence instructions that you want:

If you want to...	Then Go To
Manage Employee Absence Requests	Part 1
View Employee Balances	Part 2
Enter Absence Events on Behalf of Direct Reports	Part 3
Manager Resources Dashboard	Part 4

Part One: Manage Employee Absences

Follow these steps to review and manage employees' absence requests:

1. Go to Notifications and click on  to view submitted absence requests.
2. Click on title of the task to open and manage the absence request.

BPM Worklist TestDirector M

Views + ✎ ✕ → Actions ▼ ✓ ✕ 🔍 ▼ Me & My Group ▼ Assigned ▼ 📅

	Title	Number	Creator	Assigned
Inbox	Approval of Vacation Absence Request for Yogi MgrFA Business S	202284	Yogi MgrFA Bus...	4/26/17 2:16 AM
My Tasks (6)	Approval of Vacation Absence Request for Madison TestCustodian	202275	Madison TestCu...	4/26/17 2:03 AM
Initiated Tasks	Approval of Sick Leave Absence Request for Madison TestCustodi	202283	Madison TestCu...	4/26/17 2:01 AM
My Staff Tasks	Approval of Time Entries for TestStudent Worker Jim from 2017-04-	202181	TestStudent Wo...	4/22/17 2:25 AM
Administrative Tasks	Approval of Time Entries for TestUC Attendant Bazler from 2017-04-	202155	TestUC Attenda...	4/22/17 2:23 AM

3. Review absence request, scrolling down to view comments and attachments.

Approval of Sick Leave Absence Request for Madison TestCustodian from 2017-04-26 to 2017-04-27

▲ **Details**

Assignee 600100

From 600081

Assigned Date 4/26/17 2:01 AM

Task Number 202283

▲ **Recommended Actions**

▲ **Absence Records**

▲ **Details**

Absence Entry Details

Type Sick Leave Shawnee State University LE

Basic Mode

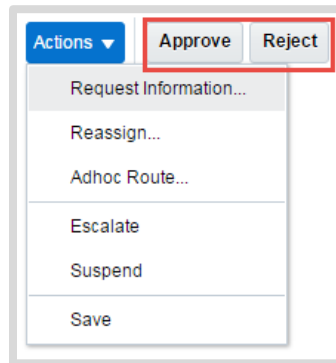
Single day —

Start Date 4/26/17	Start Date Duration 8 Hours
End Date 4/27/17	End Date Duration 8 Hours
Duration 16 Hours	

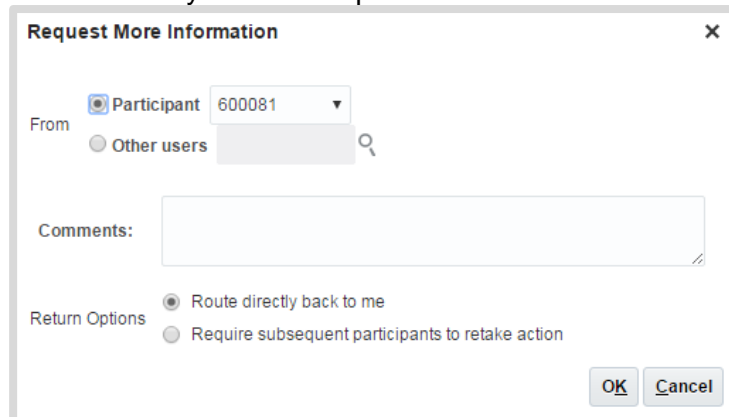
Reason

Comments

4. Take appropriate action on the absence request from the upper right hand corner.
Options include:

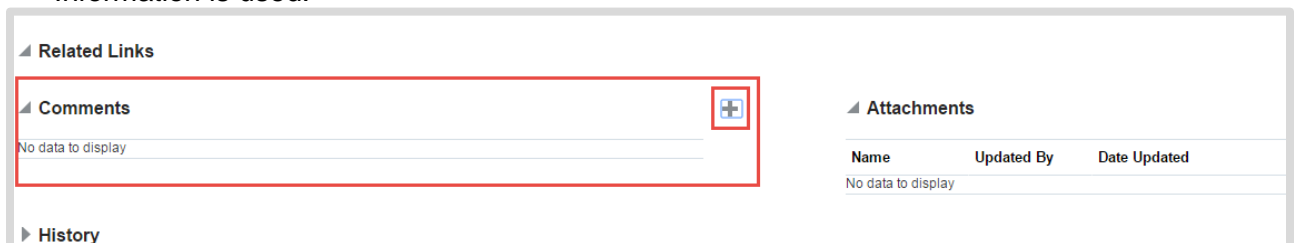


- a. Approve – Approve absence request can be approved.
- b. Reject – Reject if absence request cannot be approved. *Note!* When using reject, managers must include a comment describing the reason for the rejection. This is typically used if modification of the request is necessary.
- c. Request Information – Identify who the request for information is sent to.



- d. Reassign – Reassign if you are not the best person to approve the request.
- e. Adhoc – Add others to the approval process.
- f. Escalate – Escalate to next manager if additional sign-off is required.

5. Add Comments as needed. *Note!* Comments must be added if Reject or Request Information is used.



- a. Click the +.
- b. Enter Comment.
- c. Click OK.

Note: Employees with Multiple Assignments

Employees with multiple assignments **must** use the Advanced Mode to request absences so that they can stipulate the position for which they are requesting time off. If employees with multiple assignments do not use the Advanced Mode, *the leave requested will be applied to all assignments based on the work schedule for all positions, using more time off than necessary!*

When approving absence requests for employees with multiple assignments, the request will automatically be routed to manager of the position for which the absence request is being made.

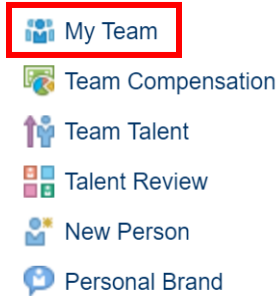
Part Two: View Employee Balances and Absence Request History

Managers are able to view leave balances of direct reports at any time.

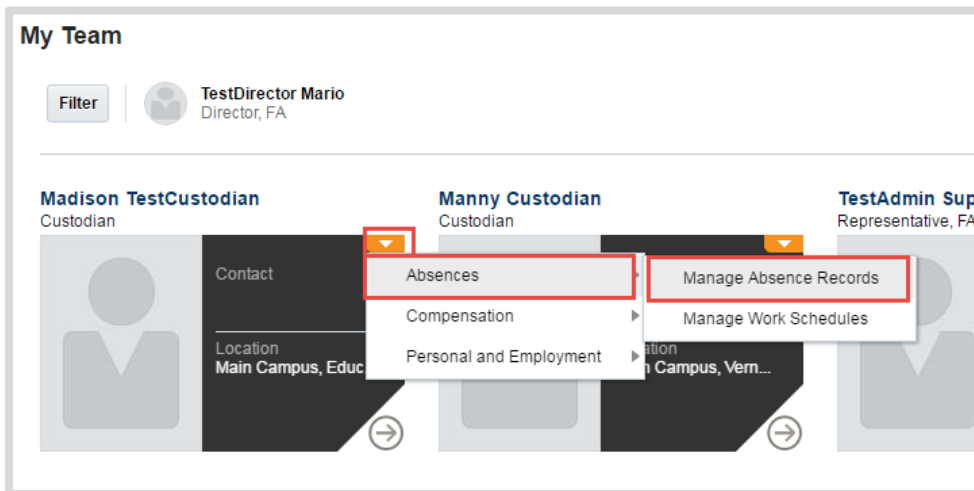
Follow these instructions to view employee balances:

1. From the Navigator, click on My Team.

My Team



2. Click the orange drop down arrow next to the employees contact card.
3. Select Absences and Manage Absence Records.



4. View Accrual Balances, recent absence requests and approval status for the employee.

Dates	Absence Type	Duration	Status	Delete
7/6/17	Vacation	8 Hours	Awaiting approval	✕
4/26/17 - 4/27/17	Sick Leave	16 Hours	Awaiting approval	✕

Plan	Balance Calculation Date	Balance
Comp Time Plan	1/15/16	0 Hours
Personal Leave Plan - Support Staff and Security	11/6/16	8 Hours
Sick Leave Plan - Non Faculty	1/15/16	120 Hours
Test LOA Absences	1/15/16	4.62 Hours
Vacation Plan - Support and Admin	1/15/16	3.08 Hours







Part Three: Enter Absence Events on Behalf of Direct Reports

Managers are able to create, edit and delete absence requests on behalf of employees.

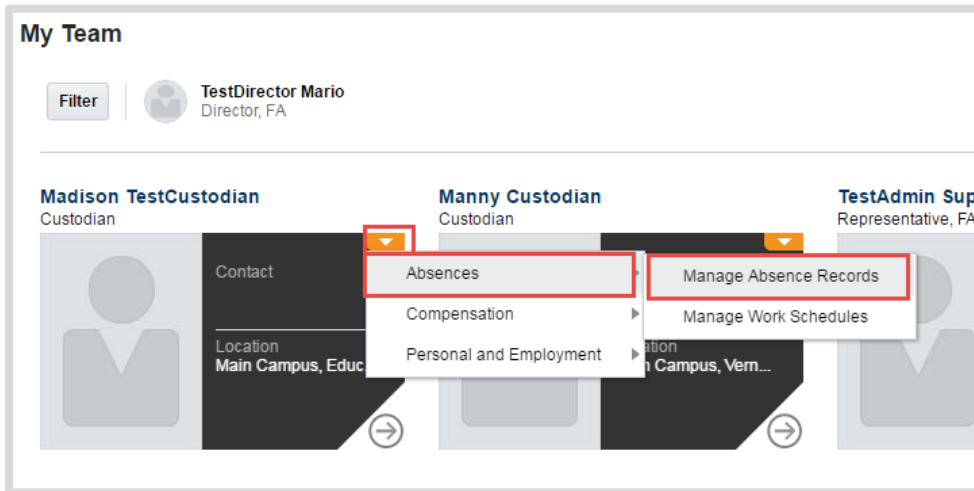
Follow these instructions to view employee balances:

1. From the Navigator, click on My Team.

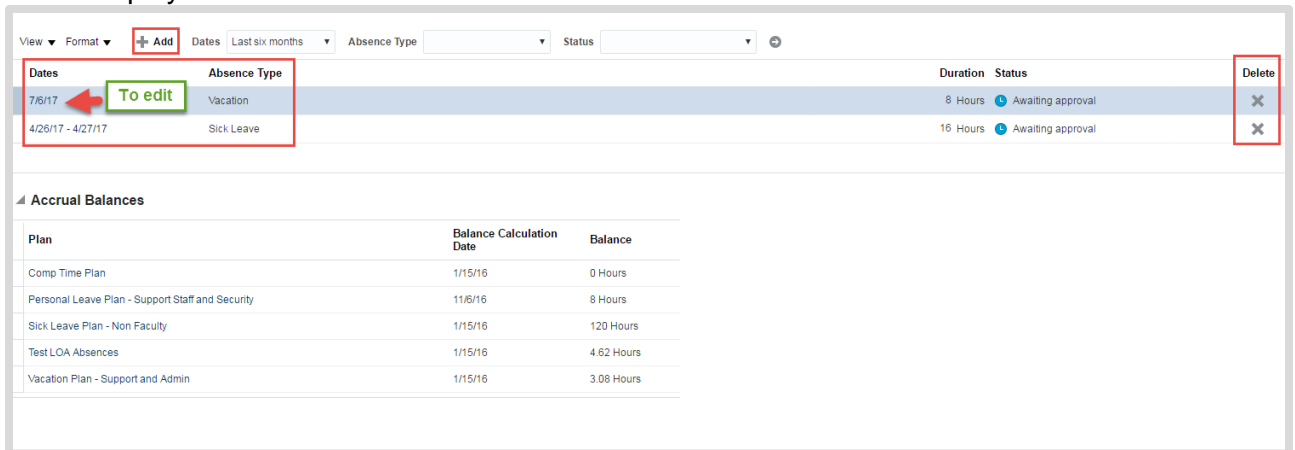
My Team

-  My Team
-  Team Compensation
-  Team Talent
-  Talent Review
-  New Person
-  Personal Brand

2. Click the orange drop down arrow next to the employees contact card.
3. Select Absences and Manage Absence Records.



4. Add an absence event, edit a submitted absence, or delete an absence request on behalf of the employee.



Part Four: View Manager Resources Dashboard

Follow these instructions to view the availability of your team.

1. From the Navigator, under the “My Team” category click “Team Compensation.”


My Team

-  My Team
-  **Team Compensation**
-  Team Talent
-  Talent Review
-  New Person
-  Personal Brand

2. Click the “Task” then select “Manager Resources.”

Team Compensation: Coordinator, FA ▾

Filter  **Megan Ketter**
Coordinator, FA

 **AP**
Abbey Perry
Student Employee

8.30 USD
Hourly (0.63...

Salary Range 8.15-8.15
Compa-Ratio 101.8 Above Range ↑

Grade St

Click here first.

Click here second.

Related Links
[Manage Workforce Compensation](#)
[Manager Resources](#)

3. Scroll down to Worker Availability. Worker availability is color coded.

TestDirector Mario Change Focus

My Organization

Chart Grid List
 Subordinate Levels to Display: 1 ^ v
 View By: Line manager v
Analysis Options

General Employment Availability Compensation Performance

Actions View Format Freeze Wrap Compare

Name	Manager	Job	Worker Type	Primary Phone	E-Mail
Custodian, Manny	Mario, TestDire...	Custodian	Employee		
Jim, TestStudent Worker	Mario, TestDire...	Student Employee	Employee		
Larry, TestAdmin Support Staff	Mario, TestDire...	Representative, FA	Employee		
MgrFA Business Sys, Yogi	Mario, TestDire...	Manager, FA Busine...	Employee		
TestCustodian, Madison	Mario, TestDire...	Custodian	Employee		

Columns Hidden: 10

Worker Availability

4/26/17 View Calendar

Name	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Bazler, TestUC Attendant		Working shift	Working shift	Working shift	Working shift	Working shift	
Custodian, Manny		Working shift	Working shift	Working shift	Working shift	Working shift	
Jim, TestStudent Worker		Working shift	Working shift	Working shift	Working shift	Working shift	
Larry, TestAdmin Support Staf		Partially working	Partially working	Working shift	Working shift	Working shift	
MgrFA Business Sys, Yogi		Working shift	Working shift	Working shift	Working shift	Working shift	

Absence Calendar event Partially working Working shift

Closing Notes

By following the instructions in this Job Aid you will be able to manage employee absences.