CALM Project
Absence Management System Implementation

Department Absence Administrator
Information Session
June 2012
Agenda

• Project goals / accomplishments to date
• CALM roles and responsibilities
• System functionality / Demo
• Resources and Training
• Q&A
Goals of Project

- Have accurate cost estimate of the University's paid time liability for financial stewardship, planning, and audited financial statements
- Record and track absences and balances efficiently
- Provide managers and staff with efficient absence management tools
- Develop and implement absence policies that are consistently and fairly applied across the campus
What has happened to date

- Policies revised and communicated at information sessions and on the CALM website
- Departments providing opening balances
- “Reports to” information, i.e., organizational structures, being updated in PeopleSoft
- Absence Management module built based on input and feedback from many campus partners
- Training materials developed
Policy Overview

• Vacation, sick day, personal day policies effective July 1, 2012
  – Number of days off in total remain the same for all staff
  – Sporadic absence now called sick days
  – Personal days were known as optional holidays
• Policies updated based on feedback received from campus community over last eight months
• Any departmental websites with time off policies should be updated to align with HR policy
• Managers must continue to approve requests for vacation and personal time, as the approval process is not automated in Absence Management
Review: About the System...

- Monthly-paid employees enter time off directly into new system
- Biweekly-paid employees continue to enter time off into Time Collection
- Managers view time off information for their groups in Self Service with drill down to lower organizational levels as appropriate
- Department Managers and Department Absence Administrators able to run absence reports from the Information Warehouse
- No built-in, automated approval process; activity monitored on-line and through reports
- Not a time-tracking or attendance system, only for absences
CALM Roles & Responsibilities

• Employees
  – Enter and/or maintain own time off information
    • Monthly-paid employees only
  – Can view their current balances for year and time taken (biweekly- and monthly-paid employee)
  – Four pages comprise HR Self Service
    ▪ Report Absence
    ▪ Edit/Cancel Unprocessed Time
    ▪ Balance Statement (view only)
    ▪ Absence Balances (view only)
CALM Roles & Responsibilities

- Managers
  - View and/or maintain information for those who are in their organizational reporting structure
  - Same pages as Employee Self Service
    - Additional “employee selection” page in front of each transaction
  - Optional: Delegation of manager role to another person
Manager Delegation

- A manager can only designate **one** proxy.
- An individual can be a proxy for more than one manager.

**Create Delegation Request**

**Enter Dates**

Ben O’Drill

Admin 11, Executive Officer

Enter the dates for your delegation request. Enter a From Date that is today or later. Enter a To Date that is the same as or later than your From Date. For open-ended delegation requests, leave the To Date blank.

**Delegation Dates**

From Date: 06/30/2012

To Date: [ ]

- [ ] NEXT
- [ ] Cancel

**Select Proxy by Hierarchy**

Ben O’Drill

Admin 11, Executive Officer

This page displays persons within your hierarchy that you can select as proxies. Click the radio button next to the name to select that person as a proxy. You can also select the Search by Name hyperlink to search for proxies outside your hierarchy.

Search by Name

- [ ] Previous
- [ ] Next
- [ ] Cancel

- A manager can delegate authority to a “proxy”.
- Select the date range and to whom you would like to delegate your manager transactions
- All four manager transactions are delegated.
Manager Delegation

- Delegation status pages
- Proxy can accept or reject a delegation request.
- Manager can revoke the delegation at any time.

- Delegation is optional.
- Departments should have a coordinated approach to managing delegations.
- Contact HR for assistance in setting up delegations.
CALM System Demo

Manager Self Service

Not available in this PDF. Refer to the recorded information session available at www.princeton.edu/progserv/er/calm/video.
CALM Roles & Responsibilities

- **Department Absence Administrator (DAA)**
  - Primary contact/liaison to the Absence Management system administrator
  - Escalation point for issues that cannot be handled locally
    - e.g., balance corrections
  - Has access to absence data for an entire department(s)
  - Has ability to correct absence events
    - for monthly-paid employees only pre- or post-processing
    - DAA cannot change own time off records. This must be done by a backup DAA or HR Systems
  - Will have access to departmental absence reports in the Information Warehouse
More About the DAA

- Has access to two **administrative** pages in the PeopleSoft system
  - Review Absence Balances
    - View-only page: shows the current balances, as of the last processing date, for vacation, sick and personal time for a selected employee
  - Absence Event
    - Add a new absence event
    - Edit an existing unprocessed absence event
    - Delete an unprocessed absence event
    - Void a processed event
  - **Note:** Processing occurs according to the payroll schedule
    - Biweekly after TC close
    - Monthly on last business day
Departmental Reports

• Information Warehouse Reports
  – CALM Reports folder located under HR – Reports
  – Default access for those with access to the HR Dept Managers Reports or the HR Dept Administrator Reports folder
  – Basic reports at first, more will be added over time
  – Examples of reports in development:
    ▪ Absence events by employee
    ▪ Department balance summary
    ▪ Vacation maximum balance report
    ▪ Negative balance report
How to Sign Up to Be a DAA

- Most departments have already designated their DAAs
- For those that are new to PeopleSoft administrative access, the **HCM Security Access Form** must be completed and authorized
- Located in the forms section of the HR website or on the CALM home page: [www.princeton.edu/calm](http://www.princeton.edu/calm)
CALM System Demo

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Reference Materials and On-going Support

• Quick Reference Cards and Online Help
• Navigation Videos
  – For employee self service
  – For manager self service
  – For department absence administrators
• CALM Web page: www.princeton.edu/calm
• HR Policy Manual and CALM FAQs online
• Your senior HR manager
• Office of the Dean of the Faculty (academic professionals)
• OIT Help Desk
• E-mail: calm@princeton.edu
CALM Web Page

www.princeton.edu/calm

Page Features

- General information about the project
- Links:
  - Policies
  - Tools and Resources
    - Calculation tools
    - Attendance tracking tool
    - HR client contacts
    - Absence roles
    - Department Readiness Checklist
- Additional Information
  - FAQs
  - Policy change highlights
  - About the system
  - Copies of presentations and memos
Questions?

CALM Information Page:  
www.princeton.edu/calm

CALM Inquiries and Issues:  
calm@princeton.edu