CALM Project
Absence Management System Implementation

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 remains 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
CALM Roles & Responsibilities

- **Employee**
  - Enters and/or maintains own time off information (monthly-paid)
  - Can view their balances for year and time taken (all)

- **Manager**
  - Views and/or maintains information for those who are in their organizational reporting structure

- **Department Absence Administrator (DAA)**
  - Has more localized control for changes
  - Accesses all absence data for **entire department**
  - Creates and corrects absence events **post-processing**
  - Will have access to departmental absence reports in the Information Warehouse
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
System Functionality

• Employee self service pages
  – Report absence
  – Edit/Cancel unprocessed time
  – Balance statement (view only)
  – View absence balances (view only)

• Manager self service pages
  – Same as above **plus**
  – Employee selection page
  – Delegation of manager role to another person

• Department Absence Administrator
  – Access to all absence data of entire department
  – Create or correct absence events post-processing
CALM System Demo

Not available in this PDF. Refer to the recorded information session available at www.princeton.edu/progserv/er/calm/video.
Manager Delegation

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

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

My Proxies

Ben O'Drill
Admin 11, Executive Officer

This page allows you to view your proxies and the request status for each delegation request. Select a particular status and click Refresh to show the matching requests. Click the information icon to view request details. To revoke requests, select the request, then click Revoke.

Show Requests by Status:  

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Name</th>
<th>Job Title</th>
<th>From Date</th>
<th>To Date</th>
<th>Request Status</th>
<th>Delegation Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Absence Balance</td>
<td>Art Major</td>
<td>AdmPro 06, Academician</td>
<td>05/30/2012</td>
<td></td>
<td>Submitted</td>
<td>Inactive</td>
</tr>
<tr>
<td>Manager Absence History</td>
<td>Art Major</td>
<td>AdmPro 06, Academician</td>
<td>05/30/2012</td>
<td></td>
<td>Submitted</td>
<td>Inactive</td>
</tr>
<tr>
<td>Manager Absence Request</td>
<td>Art Major</td>
<td>AdmPro 06, Academician</td>
<td>05/30/2012</td>
<td></td>
<td>Submitted</td>
<td>Inactive</td>
</tr>
<tr>
<td>Manager Absence Statement View</td>
<td>Art Major</td>
<td>AdmPro 06, Academician</td>
<td>05/30/2012</td>
<td></td>
<td>Submitted</td>
<td>Inactive</td>
</tr>
</tbody>
</table>

Select All  
Clear All  
Revoke

Return to Manage Delegation

My Delegated Authorities

Art Major
AdmPro 06, Academician

This page allows you to view your delegated authorities. Select a particular status and click Refresh to show the matching requests. Click the information icon for request details.

Show Requests by Status:  

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Name</th>
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<th>From Date</th>
<th>To Date</th>
<th>Request Status</th>
<th>Delegation Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiple Transactions</td>
<td>Ben O'Drill</td>
<td>Admin 11, Executive Officer</td>
<td>05/30/2012</td>
<td></td>
<td>Submitted</td>
<td>Inactive</td>
</tr>
</tbody>
</table>

Select All  
Clear All  
Accept  
Reject

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.
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