Absence Management Dashboard

The Absence Management dashboard page is located on the Human Resources dashboard in OBI. This dashboard is used to view Paid Time Off (PTO) balances and usage for salaried administrative staff and faculty.

Dashboard Prompts

Multiple prompt options are available on this dashboard. Please select at least one prompt to limit the report by specific criteria as appropriate. Click apply once prompt(s) are selected.

Prompt Definitions

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Organization/Planning Unit/Org Campus/Location</td>
<td>The planning unit, organization, campus, or location where an employee is assigned.</td>
</tr>
<tr>
<td>Job Category</td>
<td>The classification of employees based on job duties within the institution (Administrators, Faculty, Research).</td>
</tr>
<tr>
<td>Employee Number/Last Name/First Name</td>
<td>If you would like to search for a specific employee, enter the employee’s six-digit employee number, or their last name/first name.</td>
</tr>
<tr>
<td>Supervisor</td>
<td>If you would like to search for a list of employees who report to a specific supervisor, enter the supervisor’s last name.</td>
</tr>
</tbody>
</table>

Criteria

The following absence/PTO data is included in the dashboard:

- PTO balances and usages for salaried administrative staff and faculty only
  - PTO balances and usages for hourly staff must be viewed in Workforce.
- Approved absences only
- Planned absences are only included in the Projected Balances 6/30 view. The YTD Balances and Usage view does not include planned absences.
- Current fiscal year absences only
  - To view absence usage in a previous fiscal year, please use the Faculty and Administrative PTO Usage Summary and Detail report located in the Reports tab on the Human Resources dashboard.
View Selections

View selection options are available on the Absence Management Dashboard to allow users to analyze absence detail by employee and accrual plan. The default columns displayed on each report view varies.

YTD Balances and Usage View

This view displays the accrual balances and usage by employee for each accrual plan in the current fiscal year. It is sorted by employee name.

Projected Balances at 6/30

This view displays the projected accrual balances, planned approved PTO and usage by employee for each accrual plan as of June 30th of the current fiscal year. It is sorted by employee name.

Dashboard Columns

Default Columns – YTD Balances and Usage

The following columns are displayed on the Absence Management YTD Balances and Usage view:

- Employee Name, Employee Number, Vacation Balance, Sick Balance, Personal Balance, Parental Balance (if applicable), Furlough Balance, Voluntary Furlough Balance (if applicable) Total Balance, Usage for Vacation, Sickness, Personal, Parental, Family Leave, Furlough, Total Usage

The Total Balance column shows the total of the employee’s remaining PTO (Vacation, Sick, Personal, Parental and Furlough).

The Usage columns show the total PTO hours used by the employee in the current fiscal year.

Reminder: Future planned absences and past absences not yet confirmed and approved are not included in these totals.

Default Columns – Projected Balances at 6/30

The following columns are displayed on the Absence Management Projected Balances at 6/30 view:

- Employee Name, Employee Number, Projected Accrual, Planned PTO and Projected Balance by each of the applicable PTO accrual plans listed above each accrual section.
Drill-Down Capability

You may drill-down on the usage hours in blue font to view absence details.

Absence Management Detail

The Absence Management Detail page will display the absence type, start/end date, number of hours, Family Medical Leave Act (FMLA) Flag and FMLA Reason if applicable.

The following additional columns will be included if you export the Absence Management Detail page to a CSV file:

- Assignment Date, Job Name, Title, Academic Title, Planning Unit, HR Organization, Absence ID