

Guide to Peoplesoft HR (Gold) Absence Management for Employees



Logging on to PSHR (GOLD) for Absence Management

- Employees will be sent login details when they are set up for Absence Management.
- There's a link on the Oxfam Great Britain Group on Compass under QuickLinks.
- The link can be saved as favourite (For easy access).
- If you have forgotten your password. Click on the 'Forgotten your Password?' Link on the login screen. A temporary password will be emailed to you. Follow the on-screen instructions to change your password.
- More than 4 failed attempts to login will result to account being locked.
- Employees with queries about forgotten login details or locked accounts should fill in a 'Service Now Request'. Choose Peoplesoft HR (Gold) help, then make a generic request given details.
- To change Password, click on the Navigator icon at the top right of the Homepage, then click on 'Change Password'.

The image displays two screenshots from the Oxfam Great Britain Compass portal. The top screenshot shows the main homepage with a green header, navigation tabs (Home, Groups, About, Box, Search Community), and a 'QUICK LINKS' sidebar. The 'Absence Management' link in the sidebar is highlighted with a red circle. The bottom screenshot shows the 'Software Specific Requests' section, which lists links for IBM Notes, HELIOS, PeopleSoft HR (GOLD) Help, and Collaboration Requests. To the right of this is the 'NavBar: Navigator' menu, which lists various self-service options. The 'Change My Password' option in the Navigator is highlighted with a red circle.

Making a TOIL Claim

TOIL stands for Time Off In Lieu. It is not an automatic entitlement. It must be claimed, and permission given by the manager to take TOIL in respect of extra hours worked.

TOIL is a 2-part process.

- When the extra hours are worked the employee must **claim the TOIL**. The claim is sent to the manager to approve the fact that the extra time worked can be taken as TOIL. Once the manager has approved the TOIL the claimed hours will appear on the **Request Absence Tile** as **TOIL Balance**.
- The employee can then **book a TOIL absence** (see Requesting Annual Leave, TOIL Leave and other Absences). This should be booked quite soon after the extra hours have been worked.
- **To Claim TOIL** - Log into Peoplesoft HR (GOLD) for absence management. There is a link to the login page on the **COMPASS OGB Page**.
- The employee can then **book a TOIL absence** (see Requesting Annual Leave, TOIL Leave and other Absences). This should be booked quite soon after the extra hours have been worked.
- **To Claim TOIL** - Log into Peoplesoft HR (GOLD) for absence management. There is a link to the login page on the **COMPASS OGB Page**.

My Absence & Delegations

My Absence Summary

- Request Absence
- View Requests
- TOIL Hours Worked**
- Manage Delegation

Please enter the period you wish to claim TOIL for and select 'Add TOIL Claim'.

*TOIL Claim Period

Add TOIL Claim

Enter your TOIL claims for the month. Once completed, submit to your Manager for approval.

TOIL Period: December 2015
Status: Not Available
Claim No: 2
Total Hours: 0.00

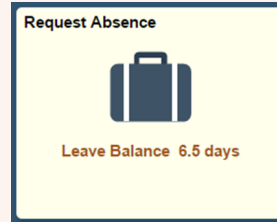
Date	Hours Earned	TOIL code	TOIL Reason
<input type="text"/>	Long Hours		<input type="text"/>

Comments

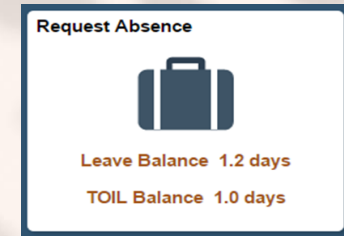
Save **Submit**

Checking Annual Leave and/or Toil Balance

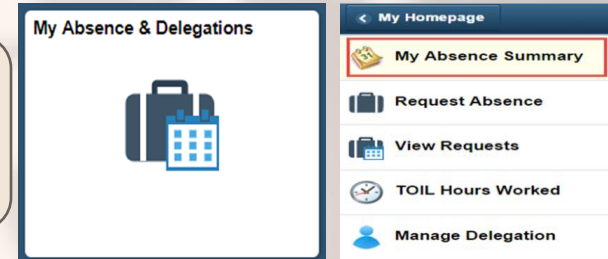
- Log into Peoplesoft HR (GOLD) for absence management. There is a link to the login page on the COMPASS OGB Page.
- Leave balance will be shown on the **Request Absence** tile. It will be shown in days for full time Employees and hours for part time Employees.



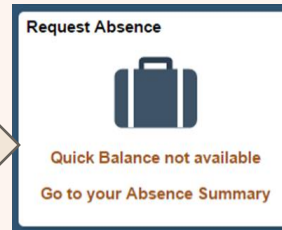
TOIL Balance will also be shown on the tile if the Employee has claimed TOIL, and it has been approved by the Manager.



- For all employees, more details can be seen under the **My Absence Details** tile. Click on the tile and choose **My Absence & Delegations** tile.



An Employee with two jobs will not be able to see their absence balance on the **Request Absence** tile.



Further details can be seen by clicking the Leave Summary link.

- Employees with two jobs will need to choose which job they are looking at.
- The Absence Summary will appear as below. You can check your annual leave entitlement and balance in hours together with current and upcoming absences and recent completed absences. These figures are usually up to date but may not reflect any changes that have been made the same day.
- Once submitted and approved a request cannot be cancelled. If an error is made or if there is a change in circumstances meaning the holiday will not be taken the employee will have to ask their manager to cancel the request.

My Absence Summary

Admin Officer (BUS)

Absence Year: 2015/2016

(From 01/04/2015 To 31/03/2016)

Request Absence

My Leave		My TOIL		My Sickness	
	Hours		Hours		
Leave Entitlement	198.00	Earned TOIL	0.00	Total Sick Days Taken	0.00
Leave Adjustment *	0.00	Total TOIL Taken **	0.00	Total Sickness Occurrences	0
Total Leave Entitlement	198.00	TOIL Balance	0.00		
Total Leave Taken **	156.00	TOIL Summary		Sickness Summary	
Leave Balance	42.00				
Leave Summary					

* Includes carry over from a previous year and / or part-time bank holiday adjustment.
** All total take figures include submitted and approved requests.
Note: These figures are usually current but may take 24 hrs to be updated in some circumstances.

Current and upcoming absences for the next 14 days.

Type	Begin Date	End Date	Duration	Units	Status

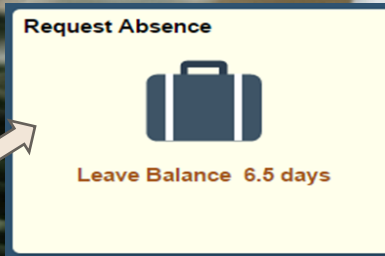
Completed absences in the past 28 days.

Type	Begin Date	End Date	Duration	Units	Status
Annual Leave	31/12/2015	31/12/2015	6.00	Hours	Approved
Annual Leave	04/01/2016	07/01/2016	24.00	Hours	Approved
Annual Leave	18/01/2016	22/01/2016	30.00	Hours	Approved

Annual Leave Summary						
Admin Officer (BUS)						
Below is a summary of your annual leave entitlement, requests, approvals and balances. The summary figures are set overnight so they do not include any changes made today.						
By Year First 1 of 3 Last						
Absence Year: 2015/2016 From 01/04/2015 to 31/03/2016						
Paid Annual Leave in Hours						
Annual Entitlement:	198.00	Submitted (Unapproved):	0.00	Units:	Hours	
Adjustment:	0.00	Approved:	156.00			
Total Entitlement:	198.00	Total Take:	156.00	Balance:	42.00	
Leave Requests						
Begin Date	End Date	Duration	Status	Void	Last Actioned By	
08/05/2015	08/05/2015	6.00	Approved			
29/06/2015	14/07/2015	72.00	Approved			
14/08/2015	14/08/2015	6.00	Approved			
18/09/2015	21/09/2015	12.00	Approved			
31/12/2015	31/12/2015	6.00	Approved			
04/01/2016	07/01/2016	24.00	Approved			
18/01/2016	22/01/2016	30.00	Approved			

Requesting Annual Leave, TOIL Leave and other Absence

- Log into Peoplesoft HR (GOLD) for absence management. There is a link to the login page on the COMPASS OGB Page.
- Click on the Request Absence tile.



The types of absence that can be requested are :-

- Annual Leave
- TOIL
- Urgent Private Business
- Other legal absence
 - Jury Service
 - Union Representative Business
- Other paid absences
 - Appointment
 - Compassionate Leave
 - Conferences
 - Dependency Leave
 - External Training
 - Military Leave
 - Parental/Partner Leave
 - Rest and Recuperation
 - Study Leave

A screenshot of the 'Request Absence' form in the Peoplesoft HR system. The form has a blue header with the title 'Request Absence'. It contains several fields: '*Job Title' with a dropdown menu showing 'Admin Officer (BUS)'; '*Absence Name' with a dropdown menu showing 'Paid Annual Leave in Hours'; '*Start Date' and 'End Date' with calendar pickers showing '25/01/2016' and '29/01/2016' respectively; 'Duration' with a text input showing '30.00' and a unit dropdown showing 'Hours'; 'Partial Days' with a dropdown showing 'None'; a 'Check Eligibility' button; and a 'Comments' text area. Red callout boxes with arrows point to specific fields: one to the Job Title dropdown with the text 'Employees with two jobs need to choose the correct job title for the required leave.'; one to the Absence Name dropdown with the text 'Choose the type of Leave to be requested.'; one to the Start and End Date fields with the text 'Input the start and end date of the required leave. The system will not allow leave starting or ending on a non-working day.'; and one to the Duration field with the text 'The duration will be calculated according to the Employee's work schedule.'

Request Absence

For Annual Leave click **Check Eligibility** to see whether the requested leave is less than the outstanding balance. If it is not, the leave request can still be submitted but the manager may refuse it.

For TOIL a request cannot be submitted if the requested leave is over the TOIL balance. Comments can be added if necessary.

There is no save button for requests so the request must be submitted or abandoned.

An email will be sent informing the employee when the manager approves, denies or pushes back the request. If the request is pushed back, it can be reworked and resubmitted.

Requesting Partial Days

- When requesting the Leave (see Requesting Annual Leave and other Absences) partial days can be specified

*Job Title Admin Officer (BUS) ▼

*Absence Name Paid Annual Leave in Hours ▼

*Start Date 01/02/2016

End Date 01/02/2016

Duration 6.00 Hours

Partial Days None

Check Eligibility

Comments

A drop-down list will appear. A choice can be made for partial start day, end day, start and end day and all days. The duration of the partial day (or days) of holiday will need to be specified. If it is not the same for each day, then separate requests will need to be made.

For example - if a request is being made for 3 hours of leave on one day the request would appear as below.

Cancel Partial Days Done

Partial Days All Days ▼

Duration 3 Hours

Delegation.

When an employee is on secondment out of the UK generally, they will not be on the absence management system on PSHR (GOLD) whilst away. Absence will be dealt with off system for that period. An adjustment to their holiday balance may be necessary when they return from the secondment, but this must be discussed with HR who will make the adjustment manually.

An Employee can delegate to another person to make their holiday requests. This would be unusual.

If a manager delegates some tasks to an employee in their absence or because the employee is a PA, then an email will be sent to the employee giving details. The employee can accept following the link on the email. Their account will be updated overnight to give them the permissions required to be able to approve holiday requests etc.