

Chapter 3

Working with Employee Absences

Employees miss work for many different reasons, some of which are excused and some of which are not. Trying to keep track of these various absences for all of your organization's employees can quickly become overwhelming. The Employee Management software can quickly help you organize and track all your employee absences.

This chapter explains how to search employee records using absences and to manage employee absences, including how to add, edit, delete, and generate/print reports from employee records. In this chapter, the following topics should help you set up and maintain your district's employee data:

- Using the Absences Search Screen
- Working with an Individual Employee's Absences
- Adding Absences
- Editing Absences
- Modifying an Employee's Allowance of Hours for an Absence Code
- Generating and Printing Absence Reports
- Deleting Absence Records

Using the Absences Search Screen

To access the Absence Search screen, click on the Absences tab in the Employee search screen:

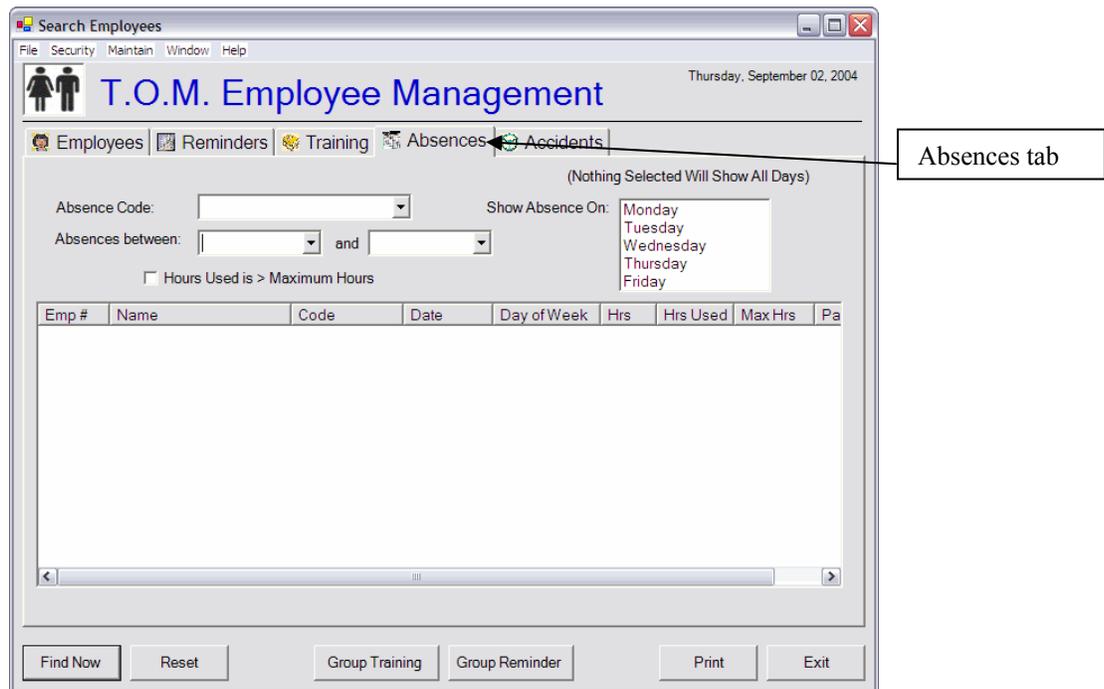


Figure 3-1. Employee Absences screen



You can use the following criteria (see Figure 3-2) to search absence records:

- **Absence Code.** Allows you to search employee records using the various absence codes you can set up.
- **Show Absence On.** Allows you to search absence records using the days of the week as the search criteria. You can select more than one day by clicking on the day name while holding down the Ctrl or Shift key.
- **Absences Between.** Allows you to search absence records within a given range, or time period.
 - » You can access the calendar by clicking on the pull-down arrows. Then, you can use the arrows displayed around the month to change the month or the arrows around the year to change the year. When the calendar displays the correct month and year, select the day. After you click the day, the Employee Management system closes the calendar and displays the date.
 - » You can also type a date into any of these fields, but if you only type the month and year, the Employee Management system uses the first of the month as the default value.
- **Hours Used Is > Maximum Number.** Allows you to specify the hours allowed for each combination of Employee and Absence Code. The Employee Management system then allows you to search for all absence records with Absence Codes where the Employees Hours Used for this Absence Code exceeds the Maximum Hours that you established for this combination of Employee and Absence Code.



Where do the absence codes come from, and how does the system know what the maximum number of absences is?

① T.O.M Tip

You can add, edit, and delete absence codes by selecting File>Absent Codes. When you add absence codes to the Employee Management system, you can set the default maximum number of hours for the absence code. You can also adjust, or customize, the maximum number of allowable hours by editing an employee's record (see page 3-13).

To search absence records using absence criteria:

1. Click the Absences tab. The Employee Management system displays the Absences tab (Figure 3-2).
2. Click the Reset button to clear the screen. The Employee Management system clears the screen.



Figure 3-2. Employee Absences search screen

3. Select or type the criteria you want to use in your search, or leave all the fields blank if you want to view all employees who have absences.



Do I have to complete the entire screen?

① T.O.M. Tip

No. You do not need to complete all the fields on the Absences tab to search absence records. In fact, if you want to view all employees who have absences, you can leave all the fields blank and then click the Find Now button.

I completed the screen, but nothing happened. What's wrong?

If this happens, click Reset. This clears any other criteria you might have selected on other screens. Then, select your absence criteria again, and click Find Now.

4. Click the Find Now button to retrieve all the employee absence records in the database that match your selected criteria.

Figure 3-3 shows a search of employees who have absences on Mondays or Fridays.

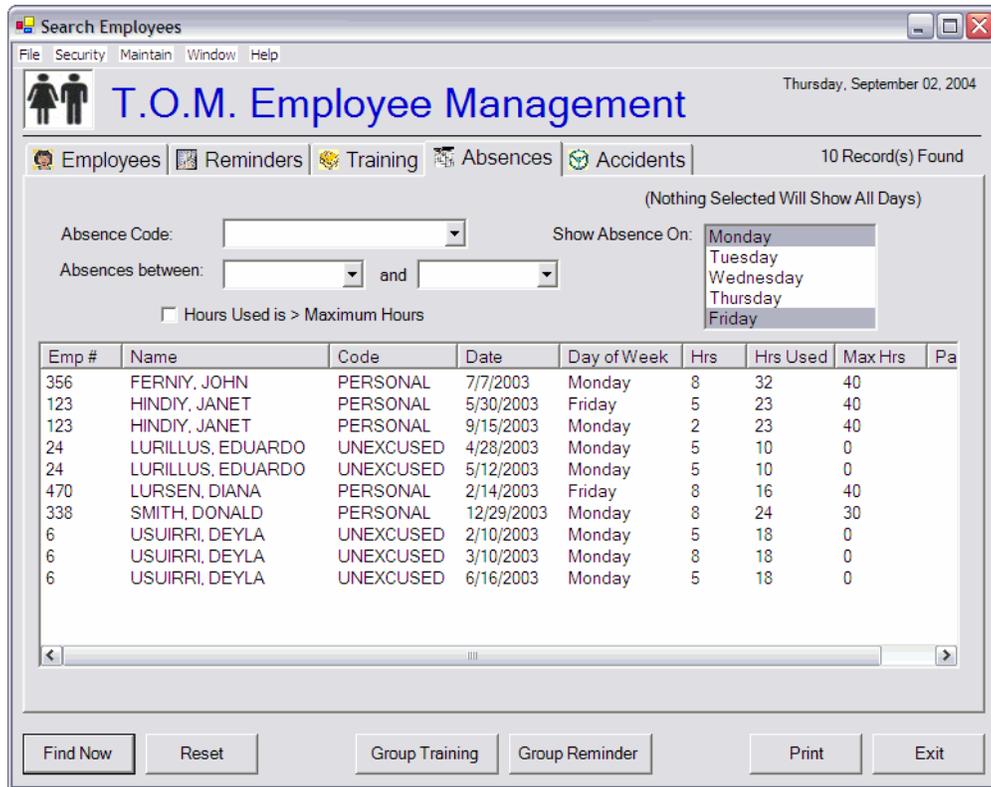


Figure 3-3. Searching for absences on Mondays and Fridays

To combine absence search options with general employee search options:

You can combine your employee absence search with the overall employee search for very sophisticated search options. For example, you can search for all employees who are drivers who were absent on Mondays and Fridays.

1. Click the Employees tab.
2. Click the Reset button to clear the screen. The Employee Management system clears the screen.
3. Select employee search criteria.

Figure 3-4 shows Driver being selected as the Employee Type on the Employees tab.

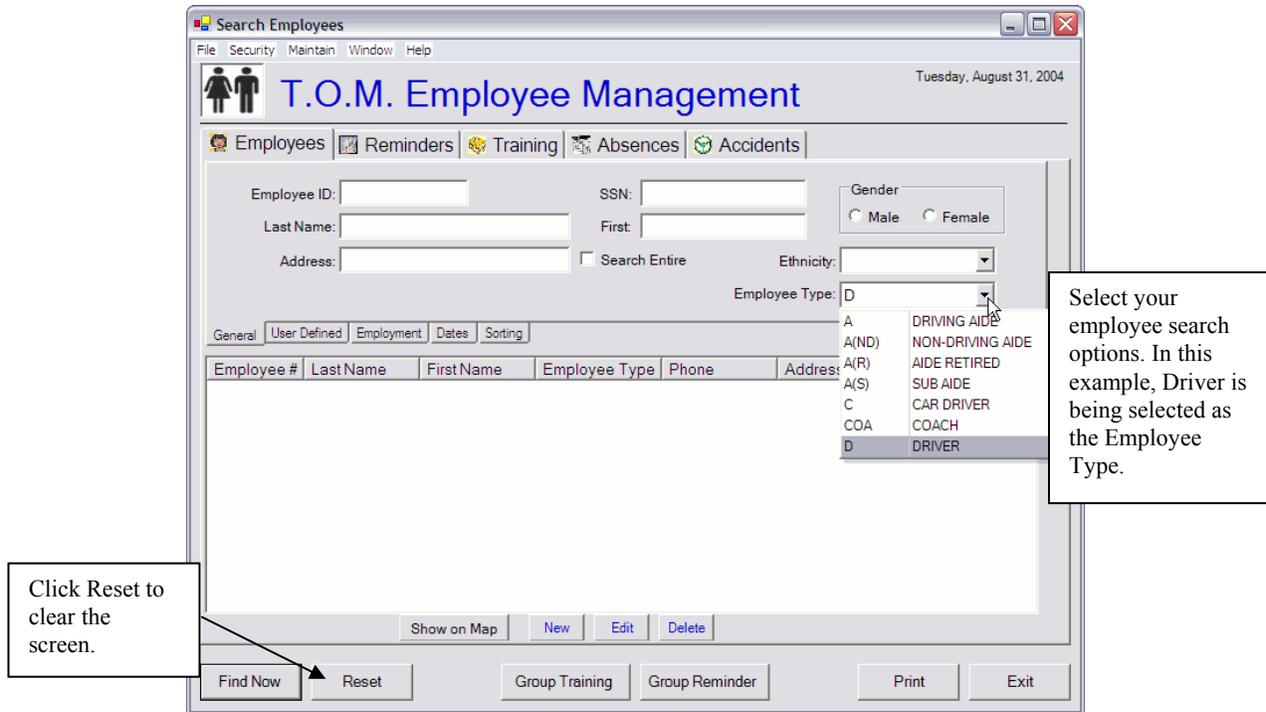


Figure 3-4. Selecting Driver as the Employee Type

- Click the Absences tab. The Employee Management system displays the Absences tab (Figure 3-5).

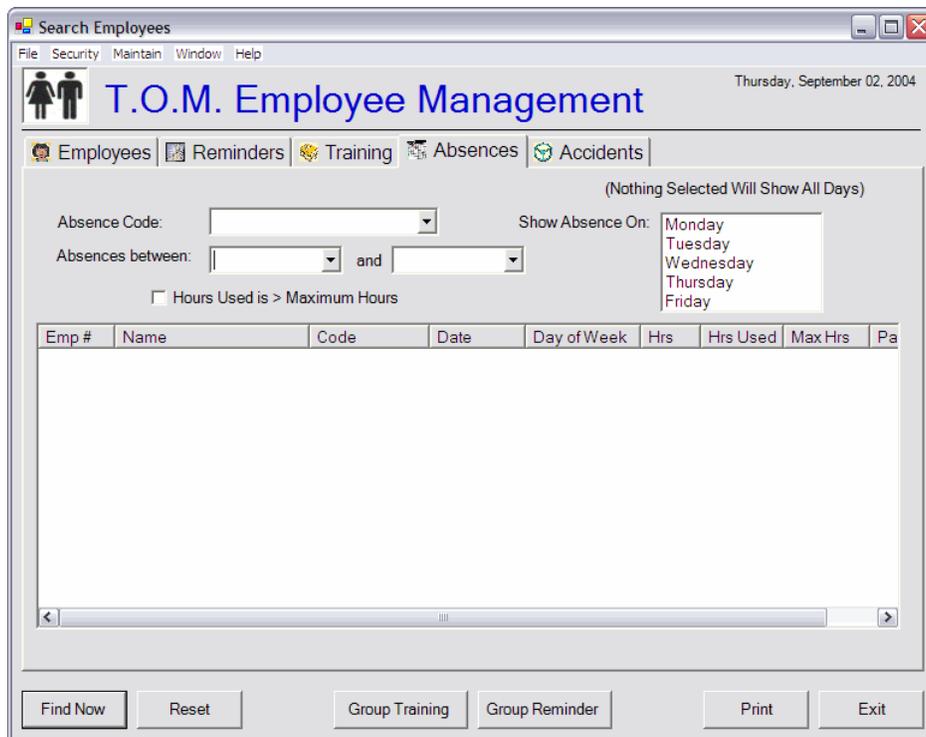


Figure 3-5. Employee Absences search screen



5. Select the employee absence search criteria you want to include in the search.
6. Click the Find Now button to retrieve all the employee absence records in the database that match the absence search criteria *and* that belong to employees who match the Employee search criteria.

Figure 3-6 shows the result of a search of drivers having absences on Mondays and Fridays.

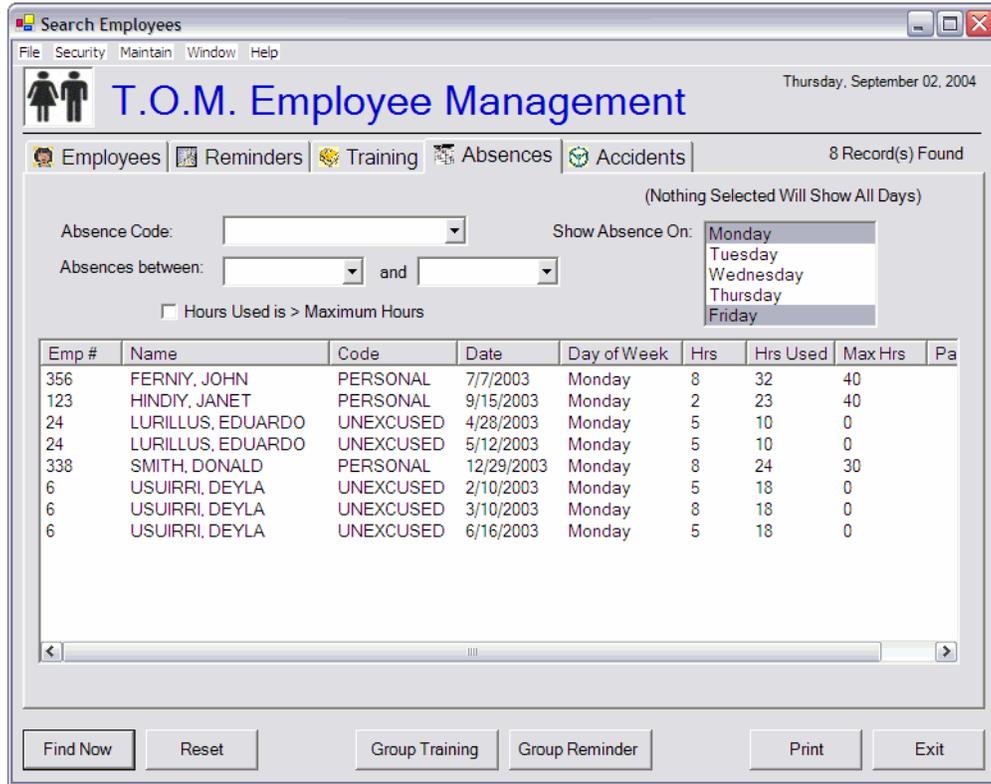


Figure 3-6. Results of a search of drivers with absences on Mondays and Fridays

Working with an Individual Employee’s Absences

To add, change, or delete absence records, you must be working with an individual employee’s record. This section contains the following information:

- *Working with a Single Employee’s Absences* tells you how to access an employee’s absence records.
- *Searching an Employee’s Absences, or Looking Up An Employee’s Absence Hours* explains how to filter an individual employee’s absence records so that you can see how many hours an employee has used for a particular absence code, the allowable number of hours for that employee’s absence code, and the number of hours remaining.

Working with a Single Employee’s Absences

1. Click the Employees tab.
2. Click the Reset button to clear the screen. The Employee Management system clears the screen.



3. Select the search criteria.
4. Click the Find Now button to retrieve all the employee records in the database that match your selected criteria. Figure 3-7 shows Smith as the search criteria.

Search Employees

File Security Maintain Window Help

T.O.M. Employee Management Thursday, September 02, 2004

Employees Reminders Training Absences Accidents 6 Record(s) Found

Employee ID: SSN: Gender: Male Female

Last Name: First:

Address: Search Entire Ethnicity: Employee Type:

General User Defined Employment Dates Sorting

Employee #	Last Name	First Name	Employee Type	Phone	Address
264	SMITH	ALVIN	DRIVING AIDE		28 Rte 3 North
338	SMITH	DONALD	DRIVER	8987889087	
438	SMITH	LATASHA	DRIVER		
265	SMITH	REBECCA	DRIVER		
686	SMITH	STANLEY	DRIVER	5151234567	127 ELM STREET
339	SMITH	VANESSA	DRIVER		5609 N BIRCH AVE

Show on Map New Edit Delete

Find Now Reset Group Training Group Reminder Print Exit

Select the employee record you want to edit, and click Edit. You can also double-click the record.

Figure 3-7. Search results of Smith

5. Either:
 - Double-click the employee's record.
 - OR
 - Select the employee record, and click Edit.
6. Click the Absences tab. The Employee Management system displays the employee's absences (Figure 3-8).

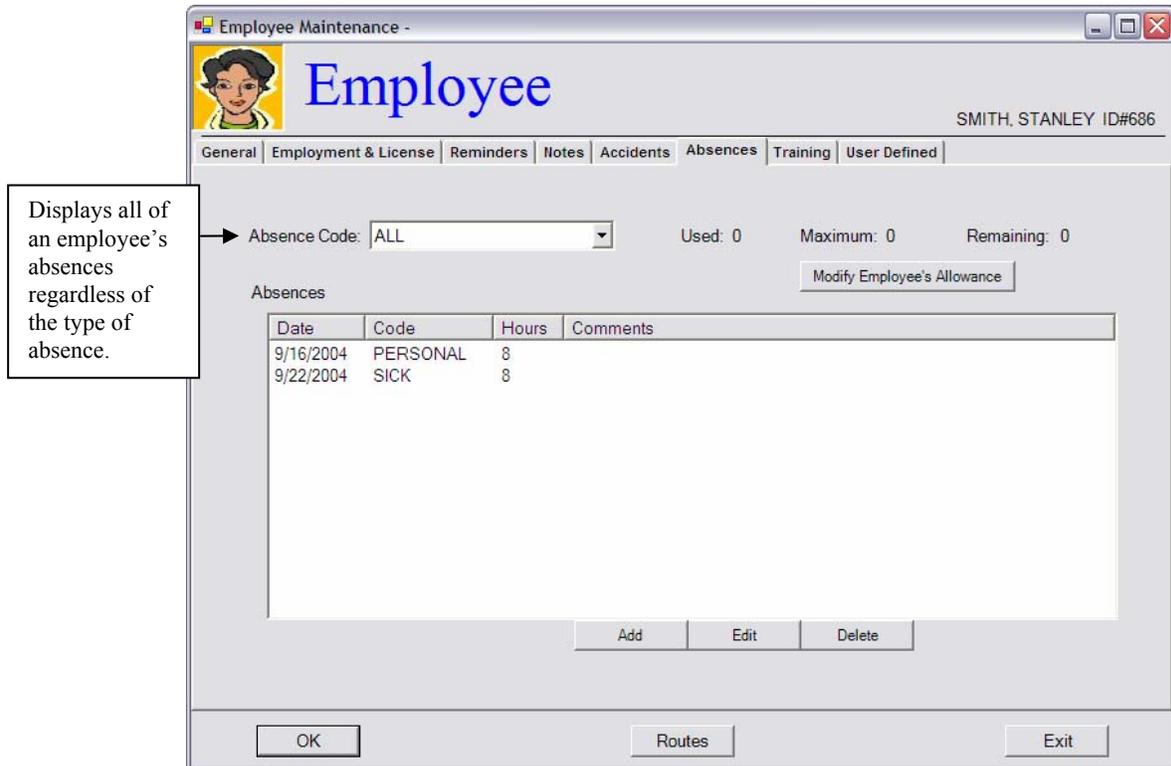


Figure 3-8. Viewing an employee's absence records

Searching an Employee's Absences, or Looking Up An Employee's Absence Hours

After you select an employee record and click the Absences tab, the Employee Management system displays all the absences for that individual employee. If you look at the Absence Code field, you will see that *All* is the default value.

You can, however, select an absence code from the drop-down list to filter the displayed list of absences for that employee. After you filter the list, the Employee Management system updates the Used, Maximum, and Remaining hours fields for the selected absence code for that employee:

- **Used.** Displays the number of hours the employee has used for the selected absence code.
- **Maximum.** Displays the maximum number of hours the employee is allowed to have for the selected absence code.
- **Remaining.** Displays the difference between the allowable, or maximum, number of hours and number of hours used.

To filter the list of absences so that you can view the hours attributed to an absence code:

1. Select an employee's record, and click the Absences tab. The Employee Management system displays all the employee's absences.
2. Select the Absence Code drop-down list, and select a code. The Employee Management system filters the list to display only those absence records matching the selected absence code.



Figure 3-8 shows that Stanley Smith has one absence record with an absence code of Personal. He is allowed 40 hours for this type of absence, and he used 8 of those hours on September 16, 2004. Therefore, he has 32 hours of PERSONAL absence hours he can use.

The screenshot shows the 'Employee Maintenance' window for Stanley Smith (ID#686). The 'Absences' tab is selected. The 'Absence Code' is set to 'PERSONAL'. A summary box shows 'Used: 8', 'Maximum: 40', and 'Remaining: 32'. A callout box points to this summary box with the text: 'When you select an absence code, the Employee Management system updates these fields.' Below this is a table of absence records:

Date	Code	Hours	Comments
9/16/2004	PERSONAL	8	Family emergency

Buttons for 'Add', 'Edit', and 'Delete' are located below the table. At the bottom of the window are 'OK', 'Routes', and 'Exit' buttons.

Figure 3-9. Viewing an employee's absence records having a specific absence code

Adding Absences

The Employee Management system not only allows you to record employee absences but also assists you in monitoring the amount of hours available for each type of absence the employee can take.

In this section, you will learn how to add an absence to the system. You will find a description for each field on the Employee Absence screen after the procedure below.

Adding an Absences to an Employee's Record

1. Click the Add button on the Absences screen (Figure 3-10).

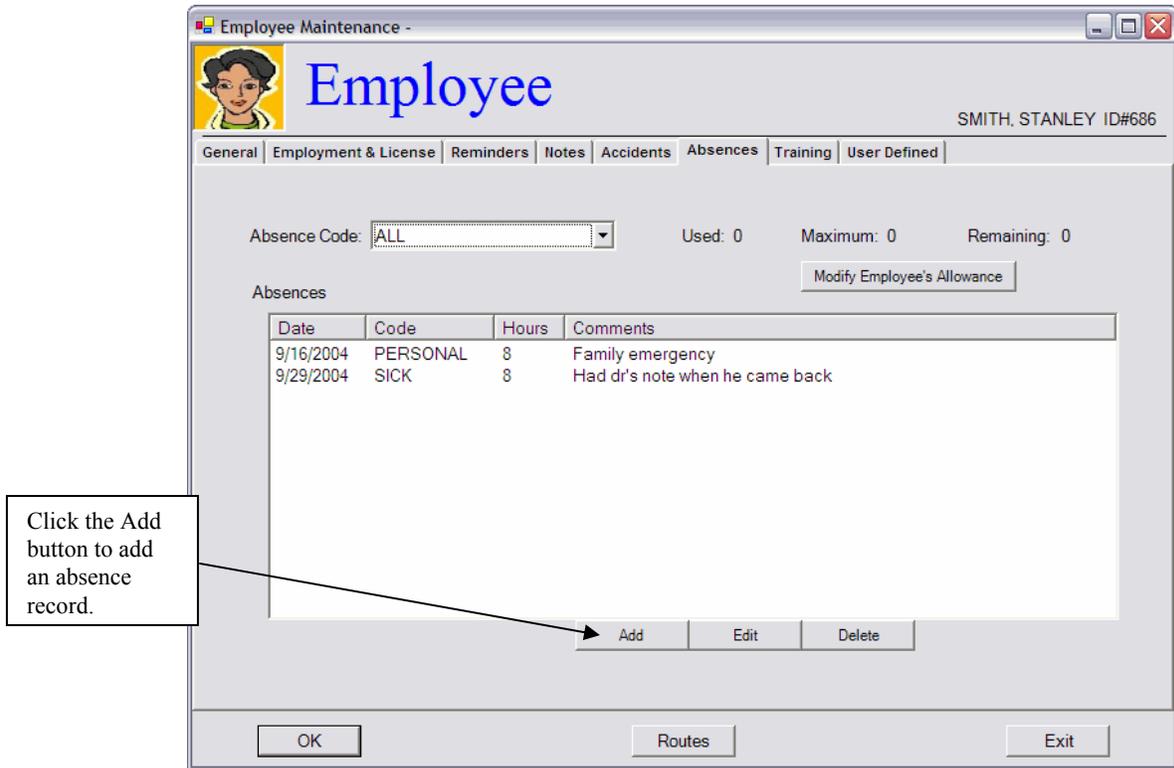


Figure 3-10. Viewing employee absences

The Employee Management system displays the Employee Absence screen.

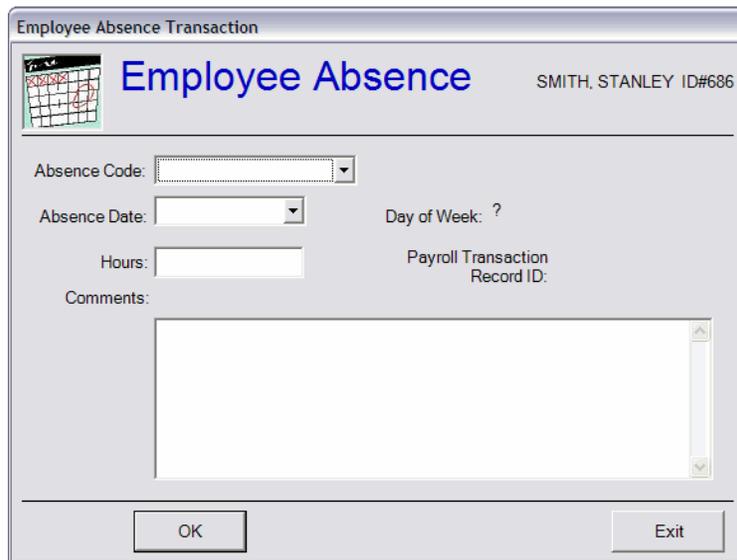


Figure 3-11. Employee Absence screen

2. Select or type in the information you want to save with the absence record. You are required to select an Absence Code and type the number of hours the employee was absent into Hours. For a detailed description of all the fields on this screen, see the Employee Absence Screen section.



After you complete the fields, the screen will look similar to:

Figure 3-12. Completing the Employee Absence screen

3. Click the OK button to save the absence record and close the screen. The Employment Management system updates the database and displays the new record:

Figure 3-13. Sample of added absence record



Employee Absence Screen

Employee Absence Transaction

Employee Absence SMITH, STANLEY ID#686

Absence Code:

Absence Date: Day of Week: ?

Hours: Payroll Transaction Record ID:

Comments:

OK Exit

Figure 3-14. Employee Absence screen

You can add the following information (see Figure 3-14) to the system:

- **Absence Code.** Allows you to select the code explaining the reason for the employee's absence.
- **Absence Date.** Allows you to select the date for the employee's absence.
 - » You can access the calendar by clicking on the pull-down arrow. Then, you can use the arrows displayed around the month to change the month or the arrows around the year to change the year. When the calendar displays the correct month and year, select the day. After you click the day, the Employee Management system closes the calendar and displays the date.
 - » You can also type a date into any of these fields, but if you only type the month and year, the Employee Management system uses the first of the month as the default value.
- **Day of Week.** Displays the day of week for the employee's absence; the Employment Management system displays a question mark until you select or type in the absence date.
- **Hours.** Allows you to select the number of hours for the absence.
- **Comments.** Allows you to type comments or details regarding the absence. You can type an unlimited number of characters into this field.

Editing Absences

Editing an employee's absences is very similar to editing his employee record information.

To edit employee absences:

1. Select the absence record you want to update, and click Edit. You can also double-click the absence record (Figure 3-15).

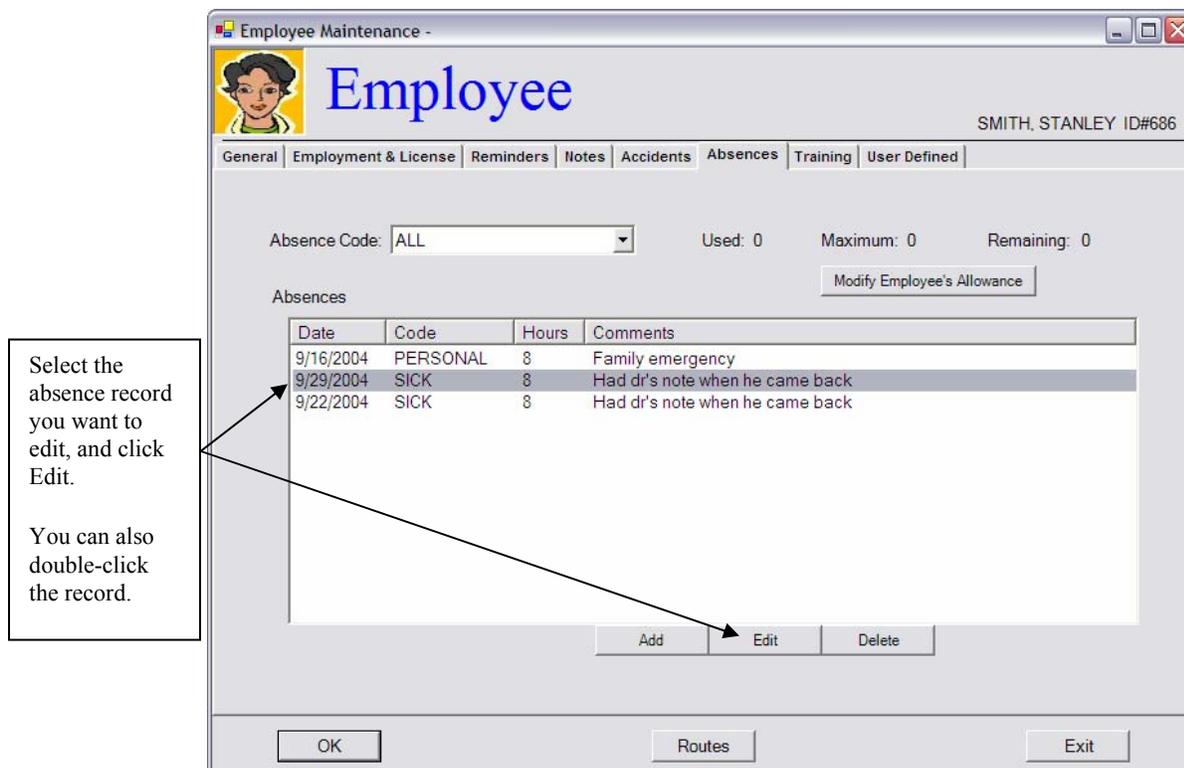


Figure 3-15. Editing employee absences

The Employee Management system displays the Employee Absences screen.

2. Update the employee record.
3. Click OK to save your changes. The Employee Management system closes the screen and updates the employee's absence record.

Modifying an Employee's Allowance of Hours for an Absence Code

You can add, edit, and delete absence codes by selecting File>Absent Codes. When you add absence codes to the Employee Management system, you can set the default maximum number of hours for the absence code. You can also adjust, or customize, the maximum number of allowable hours for an individual employee by taking the following steps:

To modify an employee's allowable absences:

1. Access the record of the employee whose absences you want to adjust. The Employee Management system displays the Employees screen.
2. Click the Absences screen. The Employee Management system displays the employees absences record (Figure 3-16).

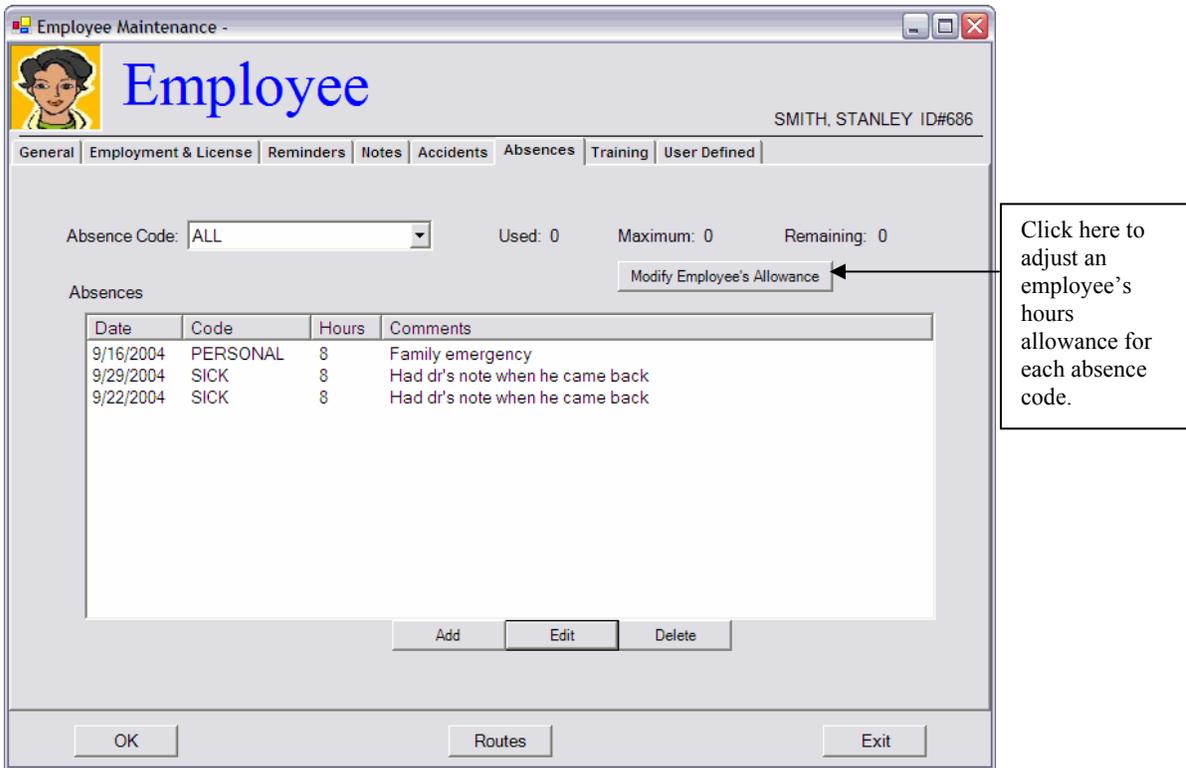


Figure 3-16. Adjusting an employee's absence code allowance of hours

3. Click the Modify Employee's Allowance button. The Employee Management system displays the Employee's Allowance screen (Figure 3-17).

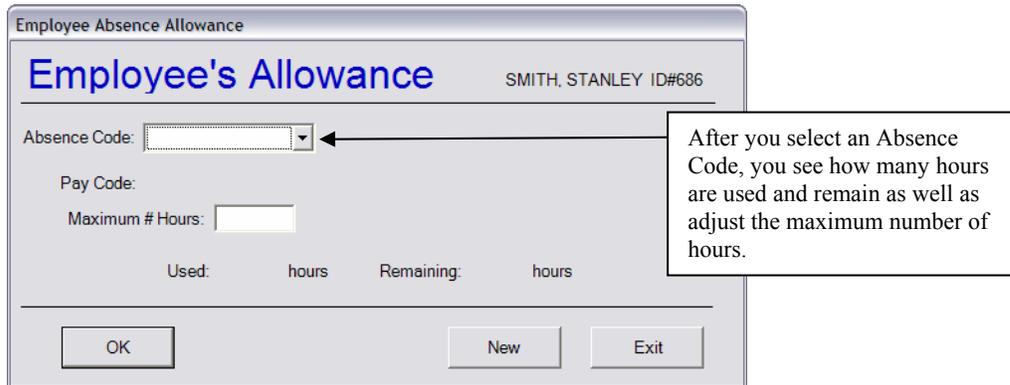


Figure 3-17. Employees Allowance screen

4. Select an absence code from the drop-down list. The Employee Management system displays the maximum number of absence hours allowed for the selected absence code, the number of hours used, and the number of hours remaining for the combination of that individual employee's absence code (Figure 3-18).



Employee Absence Allowance

Employee's Allowance

SMITH, STANLEY ID#686

Absence Code: PERSONAL LEAVE BENEFIT

Pay Code:

Maximum # Hours:

Used: 8 hours Remaining: 32 hours

OK New Exit

Figure 3-18. Adjusting the number of allowable absences

5. Type the adjusted number of hours into the Maximum # Hours field.
6. Click the OK button. The Employee Management system updates the allowable number of absences for the selected employee and absence code.

Generating and Printing Absence Reports

You can generate and print several types of absence reports for an employee or a group of employees by clicking the Print button. When you click the Print button, the Employee Management system displays a dialog that allows you to select the type of absence report you want to generate and to type in its title.

Search Employees

File Security Maintain Window Help

T.O.M. Employee Management

Thursday, September 02, 2004

Employees Reminders Training Absences Accidents 6 Record(s) Found

Employee ID: SSN: Gender: Male Female

Last Name: First:

Address: Search Entire Ethnicity:

Employee Type:

General User Defined Employment Dates Sorting

Employee #	Last Name	First Name	Employee Type	Phone	Address
264	SMITH	ALVIN	DRIVING AIDE		
338	SMITH	DONALD	DRIVER	8987889087	829 ORANGE AVE
438	SMITH	LATASHA	DRIVER		
265	SMITH	REBECCA	DRIVER		
686	SMITH	STANLEY	DRIVER	5151234567	127 FELICITY LANE
339	SMITH	VANESSA	DRIVER		5609 N BIRCH AVE

Show on Map New Edit Delete

Find Now Reset Group Training Group Reminder Print Exit

Click the Print button to generate and print an absence report for the selected absence records.

NOTE: For more information about generating and printing reminder reports, see Chapter 13 of the Users section.



Deleting Absence Records

When you delete an absence from an employee's record, the Employee Management system removes it from the employee's record and adds the hours attributed to the absence back to his allowable number of hours.

To delete an absence from an employee's record:

1. Access the record of the employee whose absences you want to adjust. The Employee Management system displays the Employees screen.
2. Click the Absences screen. The Employee Management system displays the employees absences record.
3. Select the absence you want to delete (Figure 3-19). The Employee Management system asks if you are sure you want to delete the record.

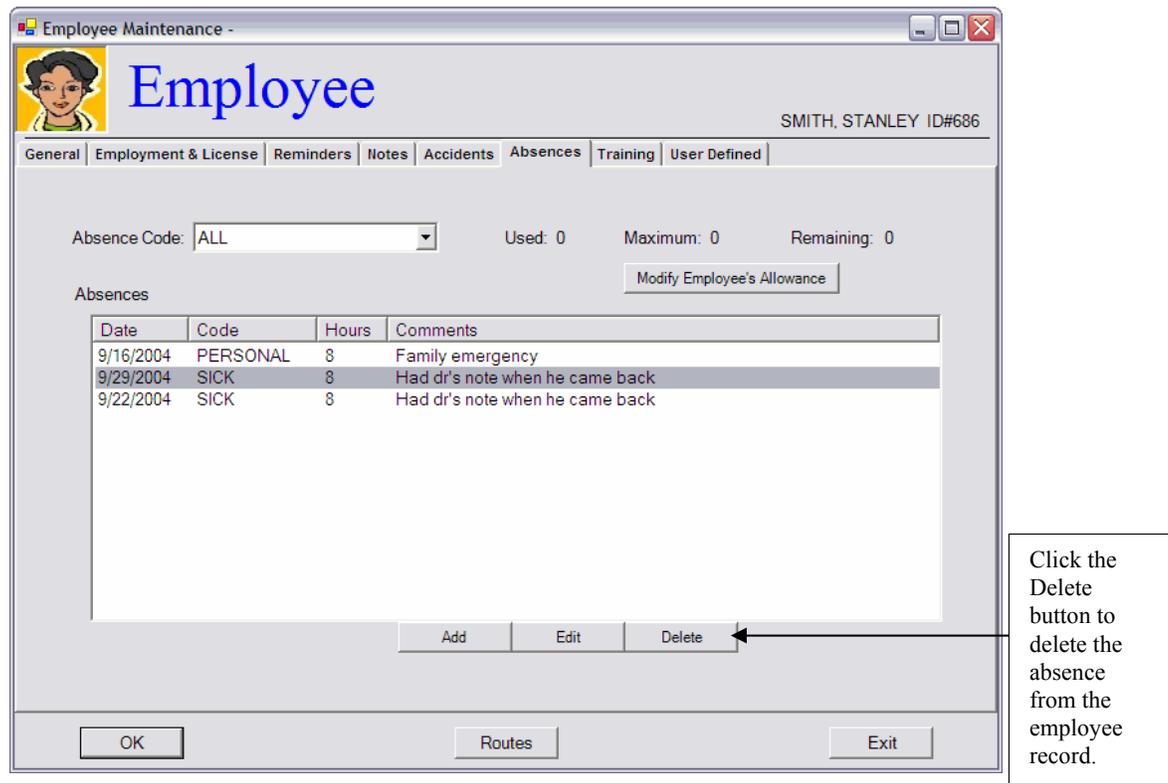


Figure 3-19. Deleting an absence from an employee record

4. Click OK to delete the absence. The Employee Management system deletes the absence from the employee's record and adds the number of hours back to his allowable number of absences.