

Officer Quarterly Closeout – Job Aid

Visit the PAC Time and Absence page on the HR Website for more information and training materials.

Purpose:

This job aid provides the steps on how to submit the *Officer Quarterly Closeout* and how managers approve them.

Employee Steps

Officers will receive an email on Day 1 after the end of a quarter, notifying them that the *Quarterly Closeout* is open for submission.

Step 1: Log in to my.columbia and click on "Submit Absence Request" from the PAC Time & Absence section of the Faculty and Staff tab.


Step 2: Navigate to the Quarterly Closeout page via **Self Service > Time Reporting > Report Time > Officer Quarterly Closeout**.

PAC Time and Absence

Note: The links below are for those participating in the Time & Labor and Absence Management Pilot – Columbia Business School, CUIT and CU Human Resources. Training materials and system downtime information is available on the [CUHR Website](#).

- [Submit Absence Requests](#)
- [Submit Timesheets](#)
- [Approve Absences](#)
- [Approve Timesheets](#)

NavBar: Navigator


Recent Places

Main Menu
Self Service
Time Reporting
Report Time
Officer Quarterly Closeout
Time

Step 3: Click **Review Current Quarter**.

Officer Quarterly Closeout

This page is used to confirm absences taken during the current quarter and to submit approved absences to your manager for sign-off to close out the quarter.

Click on the 'Review Current Quarter' to review your current quarter absences.

Gene Brown
Mgr - Dept Admin - OTHR

Current Fiscal Year: 2017 Current Quarter: 4 04/01/2017 - 06/30/2017 Review Current Quarter

Qtr. Start Date Qtr. End Date Search

Step 4: The absences for the quarter to closeout appear. Review your absences for accuracy prior to submitting. Once submitted, absences cannot be changed or submitted for the quarter unless the manager pushes the Closeout back to you.

Step 5: Click **Submit** to confirm the absences. Any absences in submitted status **must** be approved or denied prior to submitting the quarterly closeout. Absences in *Saved* or *Cancelled* status do not appear in the list.

Note: Any absences in 'Push Back' or 'Submitted' status must be approved or denied prior to submission of the Quarterly Closeout.

Absences for Review

1-4 of 4

	Absence Name	Status	Start Date	End Date	Duration	Unit	Source
1	Vacation	Approved	10/08/2018	10/08/2018	1.00	Days	Employee
2	Vacation	Approved	11/19/2018	11/21/2018	3.00	Days	Employee
3	Vacation	Approved	12/13/2018	12/13/2018	1.00	Days	Employee
4	Vacation	Approved	12/26/2018	12/27/2018	2.00	Days	Employee

Submit Cancel

Example of message received when a closeout is submitted and there is an absence in either submitted or pushed back status. Employee must work with manager to have these items approved or denied before submitting the closeout.

Message

There is one or more unapproved absence(s) for this quarter.

Please ensure all absences are approved or denied before submitting your Quarterly Closeout.

OK

Step 6: Click **OK** to the submit confirmation message.



Submit Confirmation

✓ Your Quarterly Closeout has been successfully submitted.



OK




Step 7: The **Quarterly Closeout History** section of page now contains the submitted closeout and its status and date and time of that status. To view the details for the submission, click the magnifying glass to the right of the item. Once submitted, the *Review Current Quarter* button is greyed out and cannot be accessed.

Current Fiscal Year: 2019 Current Quarter: 2 10/01/2018 - 12/31/2018 [Review Current Quarter](#)

Qtr. Start Date  Qtr. End Date  [Search](#)



Quarterly Closeout History




  1-3 of 6 ▶▶ | [View All](#)

	Qtr. Start Date	Qtr. End Date	Status	Status Date	Source	
1	10/01/2018	12/31/2018	Submitted	01/07/19 11:17:48AM	Employee	
2	07/01/2018	09/30/2018	Approved	10/05/18 11:56:04AM	Manager	
3	04/01/2018	06/30/2018	Approved	07/10/18 1:37:26PM	Manager	

Previous quarters are viewable in the History section on the page. You can also view a specific date range by entering dates in the *Qtr. Start Date* and *Qtr. End Date* fields and then click Search. Data displays only if you were active in Quarterly Closeouts for the timeframe entered.

Quarterly Closeout History

  1-3 of 5 ▶▶ | [View All](#)

	Qtr. Start Date	Qtr. End Date	Status	Status Date	Source	
1	07/01/2018	09/30/2018	Approved	10/05/18 11:56:04AM	Manager	
2	04/01/2018	06/30/2018	Approved	07/10/18 1:37:26PM	Manager	
3	01/01/2018	03/31/2018	Approved	04/09/18 2:56:06PM	Manager	

Quarters, Dates and Deadlines

This chart lists the quarters and their timeframes as well as the deadline dates when actions are due.

Quarter	Period	Closeout Open Date	Employee & Manager Deadline	System Hard Close Date
Quarter 1	July 1st - September 30th	October 1st	October 21 st	November 15th
Quarter 2	October 1st - December 31st	January 1st	January 21 st	February 15th
Quarter 3	January 1st - March 31st	April 1st	April 21 st	May 16th
Quarter 4	April 1st - June 30th	July 1st	July 21 st	August 15th

On the **Closeout Open Date**, officers will receive an email notifying them that the quarterly close for the quarter that just ended is open for submission. Note: Managers will receive a reminder email on Day 10 of the quarter.

The **Employee & Manager Deadline Date** indicates the last day an employee can submit or a manager can approve a closeout. After this date, it cannot be submitted nor approved. Absence events also cannot be recorded, submitted or approved by the employee or manager.

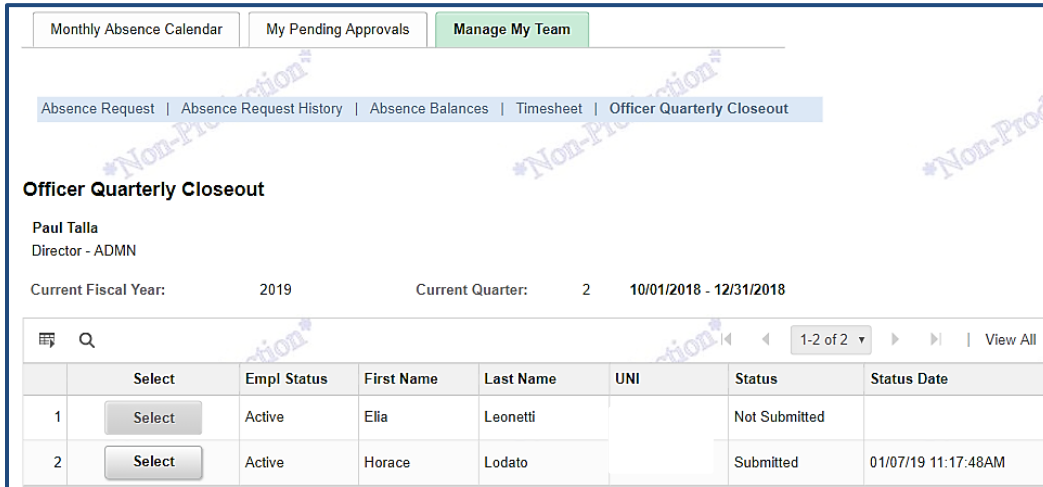
- On the rare occasion that an absence must be entered or adjusted after this deadline, the Department Time Administrator in your school/HR Department can enter absences on behalf of employees after the employee/manager deadline and those absences will populate into the absence history/detail (magnifying glass icon) on the employee's Quarterly Closeout History section, if a Closeout was submitted. DTA can enter absences only until the System Hard Close Date
- Managers cannot delegate *Officer Quarterly Closeout* activities

The **System Hard Close Date** indicates when the system will automatically close an *Officer Quarterly Closeout* that was left open. Examples include:

- Employee did not submit the closeout
- Manager did not approve the closeout
- Manager sent the closeout back to the employee for rework and the employee did not resubmit it (or manager did not approve when resubmitted)
- After this date, absence events for the quarter cannot be recorded, submitted or approved for the quarter by the DTA

Manager Steps

Step 1: Managers will receive an email notifying them that a *Quarterly Closeout* has been submitted by one of their employees and a URL to log in is provided. Within PAC, the page can be accessed via the WorkCenter in the **Manage My Team > Officer Quarterly Closeout** section. Managers also receive a reminder email at Day 10 of the new quarter.



Monthly Absence Calendar | My Pending Approvals | **Manage My Team**

Absence Request | Absence Request History | Absence Balances | Timesheet | **Officer Quarterly Closeout**

Officer Quarterly Closeout

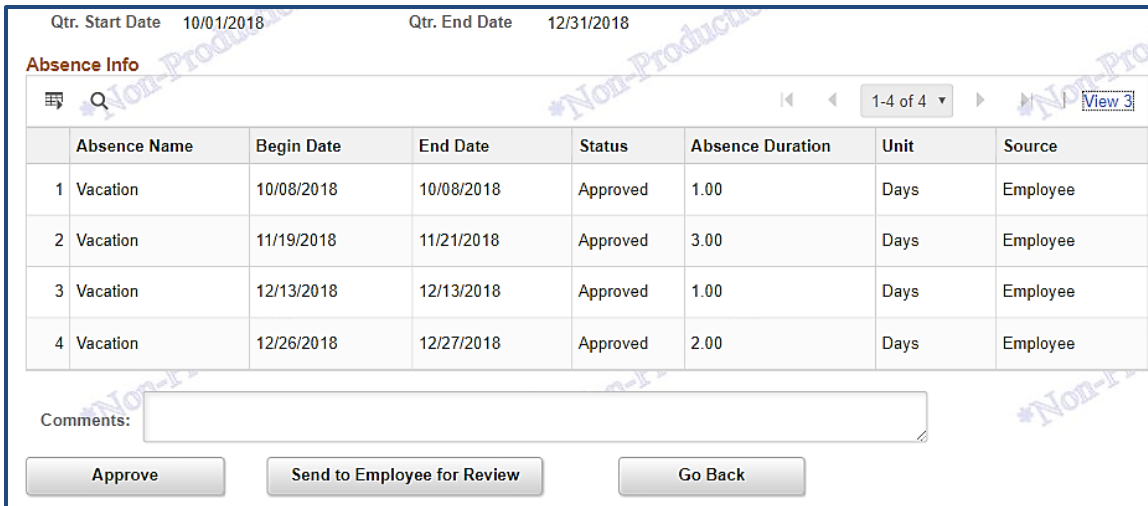
Paul Talla
Director - ADMN

Current Fiscal Year: 2019 Current Quarter: 2 10/01/2018 - 12/31/2018

1-2 of 2 | View All

	Select	Empl Status	First Name	Last Name	UNI	Status	Status Date
1	Select	Active	Elia	Leonetti		Not Submitted	
2	Select	Active	Horace	Lodato		Submitted	01/07/19 11:17:48AM

Step 2: Click **Select** next to the employee closeout to review. The absences appear.



Qtr. Start Date 10/01/2018 Qtr. End Date 12/31/2018

Absence Info

1-4 of 4 | View 3

	Absence Name	Begin Date	End Date	Status	Absence Duration	Unit	Source
1	Vacation	10/08/2018	10/08/2018	Approved	1.00	Days	Employee
2	Vacation	11/19/2018	11/21/2018	Approved	3.00	Days	Employee
3	Vacation	12/13/2018	12/13/2018	Approved	1.00	Days	Employee
4	Vacation	12/26/2018	12/27/2018	Approved	2.00	Days	Employee

Comments:

Approve Send to Employee for Review Go Back

Step 3: Review the absence data listed and submit your action.

- Approve = approves the closeout submission
- Send to Employee for Review = sends it back to the employee for correction, data entry, etc. Enter a comment as to why it is being returned and the update required. The employee makes the appropriate absence entries and submits the absences for approval. Once approved (or cancelled), the quarter closeout can be resubmitted. Managers can also record an absence on behalf of an employee, if needed, prior to approving the closeout
- Go Back = brings you back to your employee listing

Comments:

Approve
Send to Employee for Review
Go Back

Step 4: Click **Approve** to provide approval for the absences confirmed to be taken by the employee for the quarter. The status of the closeout appears next to the employee name on the **Officer Quarterly Closeout** page. Statuses are: Not Submitted; Submitted, Approved, or Rework (used when sent back to the employee). Once approved, a manager cannot change or submit new absence requests on behalf of an employee for that quarter.

Current Fiscal Year:		2019		Current Quarter:		2 10/01/2018 - 12/31/2018	
Select		Empl Status	First Name	Last Name	UNI	Status	Status Date
1	Select	Active	Ella	Leonetti		Not Submitted	
2	Select	Active	Horace	Lodato		Approved	01/07/19 12:04:55PM