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.

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: 4/01/2017 - 6/30/2017

<table>
<thead>
<tr>
<th>Qtr. Start Date</th>
<th>Qtr. End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/01/2017</td>
<td>06/30/2017</td>
</tr>
</tbody>
</table>

Review Current Quarter
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.

### Absences for Review

<table>
<thead>
<tr>
<th>Absence Name</th>
<th>Status</th>
<th>Start Date</th>
<th>End Date</th>
<th>Duration</th>
<th>Unit</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation</td>
<td>Approved</td>
<td>10/08/2018</td>
<td>10/08/2018</td>
<td>1.00</td>
<td>Days</td>
<td>Employee</td>
</tr>
<tr>
<td>Vacation</td>
<td>Approved</td>
<td>11/15/2018</td>
<td>11/21/2018</td>
<td>3.00</td>
<td>Days</td>
<td>Employee</td>
</tr>
<tr>
<td>Vacation</td>
<td>Approved</td>
<td>12/13/2018</td>
<td>12/13/2018</td>
<td>1.00</td>
<td>Days</td>
<td>Employee</td>
</tr>
<tr>
<td>Vacation</td>
<td>Approved</td>
<td>12/26/2018</td>
<td>12/27/2018</td>
<td>2.00</td>
<td>Days</td>
<td>Employee</td>
</tr>
</tbody>
</table>

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.

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

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.
Quarters, Dates and Deadlines

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

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Period</th>
<th>Closeout Open Date</th>
<th>Employee &amp; Manager Deadline</th>
<th>System Hard Close Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quarter 1</td>
<td>July 1st - September 30th</td>
<td>October 1st</td>
<td>October 21st</td>
<td>November 15th</td>
</tr>
<tr>
<td>Quarter 2</td>
<td>October 1st - December 31st</td>
<td>January 1st</td>
<td>January 21st</td>
<td>February 15th</td>
</tr>
<tr>
<td>Quarter 3</td>
<td>January 1st - March 31st</td>
<td>April 1st</td>
<td>April 21st</td>
<td>May 16th</td>
</tr>
<tr>
<td>Quarter 4</td>
<td>April 1st - June 30th</td>
<td>July 1st</td>
<td>July 21st</td>
<td>August 15th</td>
</tr>
</tbody>
</table>

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.

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

[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.

![Table](image)

<table>
<thead>
<tr>
<th>Select</th>
<th>Empl Status</th>
<th>First Name</th>
<th>Last Name</th>
<th>UNI</th>
<th>Status</th>
<th>Status Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Active</td>
<td>Ella</td>
<td>Leonelli</td>
<td></td>
<td>Not Submitted</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Active</td>
<td>Horace</td>
<td>Ledato</td>
<td></td>
<td>Approved</td>
<td>01/07/19 12:04:55PM</td>
</tr>
</tbody>
</table>