

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.

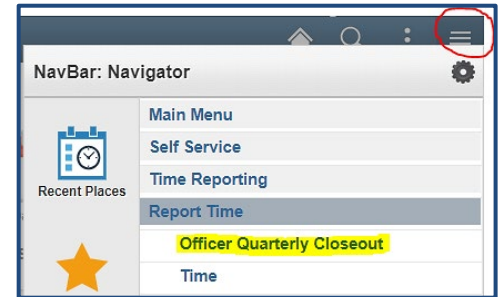
Navigate to [myColumbia](#), log in with your UNI and Password and select Faculty and Staff.



Then select People at Columbia.



From the Homepage, use the menu to navigate to the Quarterly Closeout page.
Self Service > Time Reporting > Report Time > Officer Quarterly Closeout select the **Time** tile.



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.

Maribel Mcclanahan
Director - HMRS

Current Fiscal Year: 2022 Current Quarter: 2 10/01/2021 - 12/31/2021 Review Current Quarter

Qtr. Start Date: 10/01/2021 Qtr. End Date: 12/31/2021 Search

Quarterly Closeout History

Qtr. Start Date	Qtr. End Date	Status	Status Date	Source	
1 07/01/2021	09/30/2021	Approved	10/01/21 10:00:55AM	Manager	
2 04/01/2021	06/30/2021	Approved	07/01/21 10:03:02AM	Manager	
3 01/01/2021	03/31/2021	Approved	04/09/21 11:45:14AM	Manager	

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.

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

☰ Q 1-2 of 2 ▾ ▶

	Absence Name	Status	Start Date	End Date	Duration	Unit	Source
1	Vacation	Approved	01/25/2021	01/29/2021	5.00	Days	Employee
2	Personal Day	Approved	02/02/2021	02/02/2021	1.00	Days	Employee

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.

Click **OK** to the submit confirmation message.

Submit Confirmation

✓ Your Quarterly Closeout has been successfully submitted.

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.

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.

Maribel Eden
Director - ADMN

Current Fiscal Year: 2021 Current Quarter: 3 01/01/2021 - 03/31/2021 Review Current Quarter

Qtr. Start Date Qtr. End Date Search

Quarterly Closeout History

🔍 1-3 of 13 View All

	Qtr. Start Date	Qtr. End Date	Status	Status Date	Source	
1	01/01/2021	03/31/2021	Submitted	04/08/21 11:44:09AM	Employee	🔍
2	10/01/2020	12/31/2020	Approved	01/15/21 12:38:27PM	Manager	🔍
3	07/01/2020	09/30/2020	Approved	10/20/20 10:32:56AM	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

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	Qtr. Start Date	Qtr. End Date	Status	Status Date	Source	
1	07/01/2021	09/30/2021	Approved	10/01/21 10:00:55AM	Manager	🔍
2	04/01/2021	06/30/2021	Approved	07/01/21 10:03:02AM	Manager	🔍
3	01/01/2021	03/31/2021	Approved	04/09/21 11:45:14AM	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. DTAs 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

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

Marcelino Eden
Director - ADMN

Current Fiscal Year: 2021 Current Quarter: 3 01/01/2021 - 03/31/2021

	Select	Empl Status	First Name	Last Name	UNI	Status	Status Date
1	<input type="button" value="Select"/>	Active	Maribel	Eden		Submitted	04/08/21 11:44:09AM
2	<input type="button" value="Select"/>	Active	Rose	Eden		Submitted	04/08/21 10:13:26AM
3	<input type="button" value="Select"/>	Active	Maribel	Lim		Not Submitted	
4	<input type="button" value="Select"/>	Active	Evangelina	Gillespie		Not Submitted	
5	<input type="button" value="Select"/>	Active	Jody	Forbes		Not Submitted	

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

Rose Eden

Qtr. Start Date 01/01/2021 Qtr. End Date 03/31/2021

Absence Info

	Absence Name	Begin Date	End Date	Status	Absence Duration	Unit	Source
1	Vacation	01/13/2021	01/13/2021	Approved	1.00	Days	Employee
2	Sick	01/19/2021	01/19/2021	Approved	7.00	Hours	Employee
3	Vacation	01/28/2021	01/28/2021	Approved	1.00	Days	Employee

Comments:

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

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: 2021 Current Quarter: 3 01/01/2021 - 03/31/2021							
	Select	Empl Status	First Name	Last Name	UNI	Status	Status Date
1	Select	Active	Maribel	Eden		Submitted	04/08/21 11:44:09AM
2	Select	Active	Rose	Eden		Approved	04/08/21 12:03:49PM