



Automated Substitute Placement & Absence Management
Selected by more districts than all other systems combined

Absence Reason Balances

What is Absence Reason Balance Tracking?

Aesop will allow you to assign a certain number of absence reason days or hours to an employee. For example you can assign 3 personal days to a particular employee and Aesop will subtract from the initial balance given to the employee as the employee uses sick and personal days.

Aesop will keep track of the number of days or hours an employee takes for each specified Absence Reason, and can allow employees to check on how many days/hours they have left for each of those Absence Reasons.

Tracking Balances in Days vs. Hours

Aesop gives you the ability to track Absence Reason Balances by days or by hours. This can be set up by Employee Type.

Go to Reference Data > Employee Types



	Description	Shift Types	Internal Data Analysis Category	Enforce Absence Reasons	Deduct Break Time	Balance Tracking Type	Rounding Rule
+		Use Default		<input checked="" type="checkbox"/>	Default	Track Balances By Day	No Rounding
	Aide	Use Default	Paraprofessional Staff	<input checked="" type="checkbox"/>	Default	Track Balances By Hour	Round Up To Next Quarter
	Janitor	Use Default	Facilities Staff	<input checked="" type="checkbox"/>	Default	Track Balances By Day	No Rounding
	Nurse	Use Default	Nursing Staff	<input checked="" type="checkbox"/>	Default	Track Balances By Day	No Rounding
	Principal	Use Default	Administrative Staff	<input checked="" type="checkbox"/>	Default	Track Balances By Day	No Rounding
	Teacher	Use Default	Teacher/Professional Staff	<input checked="" type="checkbox"/>	Default	Track Balances By Hour	Round Up To Next Quarter

Click the pencil icon for the Employee Type you want to edit.



	Description	Shift Types	Int
+		Use Default	
	Aide	Use Default	Pa
	Janitor	Use Default	Fa
	Nurse	Use Default	Nu
	Principal	Use Default	Ac
	Teacher	Use Default	Te

Once in edit mode you can set the employee type to have absence balances tracked in days or in hours.

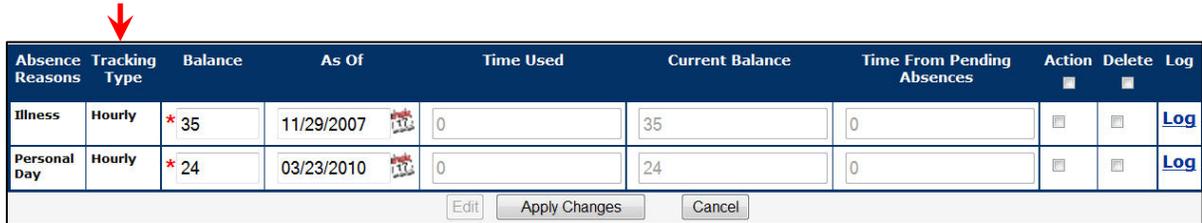
	Description	Shift Types	Internal Data Analysis Category	Enforce Absence Reasons	Deduct Break Time	Balance Tracking Type
+		Use Default		<input checked="" type="checkbox"/>	Default	Track Balances By Day
	Aide	Use Default	Paraprofessional Staff	<input checked="" type="checkbox"/>	Default	Track Balances By Hour
	Janitor	Use Default	Facilities Staff	<input checked="" type="checkbox"/>	Default	Track Balances By Day
	Nurse	Use Default	Nursing Staff	<input checked="" type="checkbox"/>	Default	Track Balances By Day

You can also set the balances to be rounded. There are a number of rounding options as can be seen here.

Balance Tracking Type	Rounding Rule
Track Balances By Day	No Rounding
Track Balances By Hour	Round Up To Next Quarter
Track Balances By Day	No Rounding
Track Balances By Day	Round Up To Next Quarter
Track Balances By Day	Round Up To Next Half
Track Balances By Day	Round Up To Next Whole Value
Track Balances By Day	Round Down To Next Quarter
Track Balances By Day	Round Down To Next Half
Track Balances By Hour	Round Down To Next Whole Value
	Round To Nearest Quarter
	Round To Nearest Half
	Round To Nearest Whole Value

When done editing just click the green check mark to save the changes.

When viewing the employee's absence reasons you will see indicated if the balances are being tracked in Days or Hours.

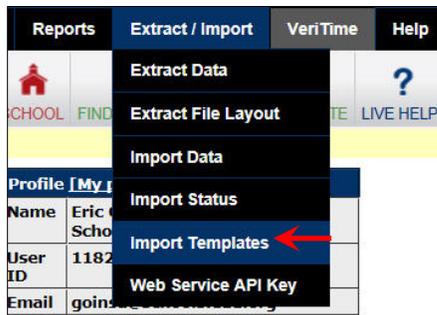


Absence Reasons	Tracking Type	Balance	As Of	Time Used	Current Balance	Time From Pending Absences	Action	Delete	Log
Illness	Hourly	* 35	11/29/2007	0	35	0	<input type="checkbox"/>	<input type="checkbox"/>	Log
Personal Day	Hourly	* 24	03/23/2010	0	24	0	<input type="checkbox"/>	<input type="checkbox"/>	Log

Assigning Absence Reason Balances to Employees

The best way in Aesop to add absence reason balances to multiple employees at once is through the Data Import feature. You will be able to put your absence reason balance information into an Excel spreadsheet and import them into Aesop.

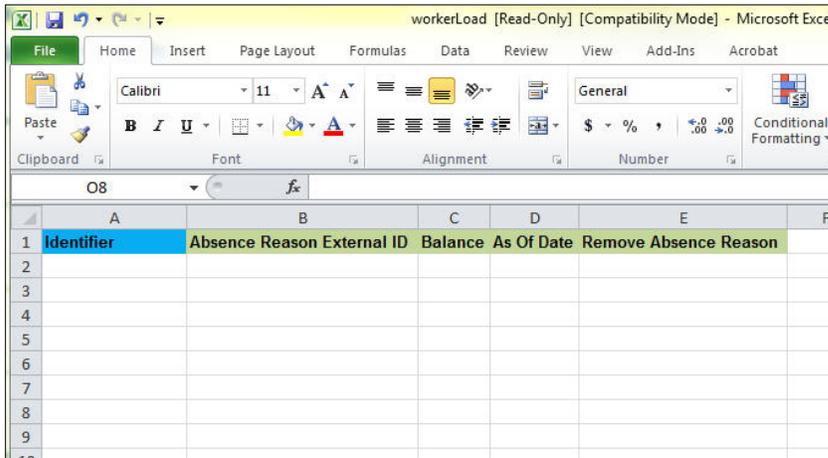
The first step is to fill out the Excel Template with the balances. To get to the template go to **Extract/Import > Import Templates**



The template you want is the **Employee Load Template**. Click the link to open the Excel spreadsheet.



This template is for uploading all kinds of data for the employee. Since you are only uploading employee absence reason balances you will only need to fill in a few of these columns. Columns that are not being used can be deleted. Below is an example of the template with all the unneeded columns removed.



Identifier – This is the employee’s district unique ID number. This is how Aesop will know who to add the balance to. The employee’s identifier can be found on their general info page.

Absence Reason External ID – This is the External ID of the absence reason you want to assign the employee a balance for. The External ID can be found in Reference Data.

Balance – The balance in days or hours (depending on the employee’s settings) that you want to assign to the employee.
Example: 3 for three days or hours.

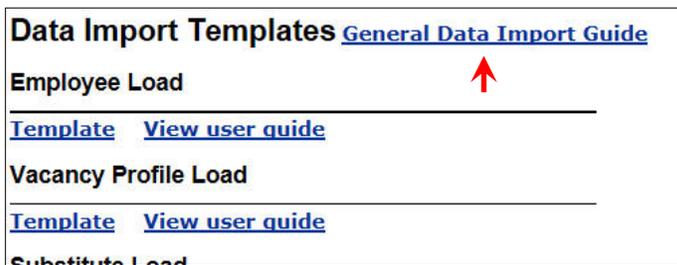
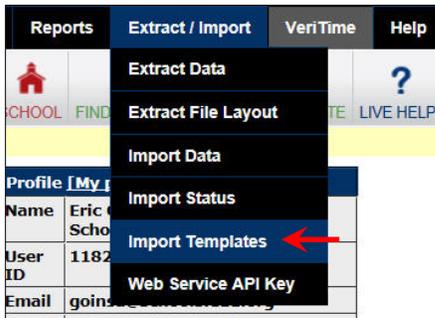
As Of Date – The date you want Aesop to begin calculating the balance.
Example: 7/1/2011

Remove Absence Reason – Put a Y in this column to remove an existing absence reason and its balance from the employee.

Once you have filled in all the necessary data save the file to your computer. Save it somewhere that is easy to find like the desktop. Your file should look something like this.

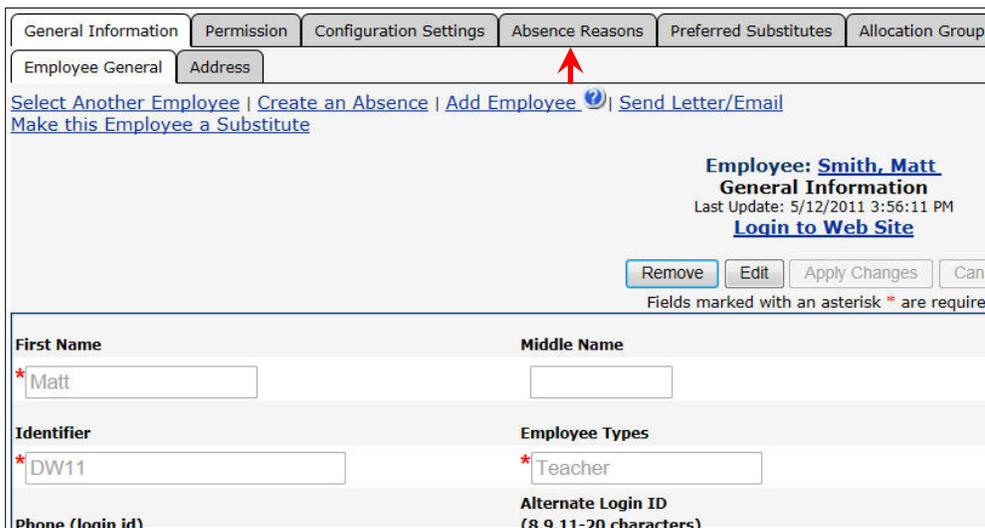
	A	B	C	D	E
1	Identifier	Absence Reason External ID	Balance	As Of Date	Remove Absence Reason
2	SMITH001	PERSONAL	3	7/1/2011	
3	BANKS005	PERSONAL	3	7/1/2011	
4	IONES011	PERSONAL	3	7/1/2011	

Now that your template file is saved you are ready to import it into the Aesop system. For instructions on how to import the file check out the import guide on the Import Templates page.



Adjusting Absence Reason Balances for an Employee

In Aesop you can adjust or edit the absence reason balances for any employee. To do this first go to the employee's general info page. Click the tab **Absence Reasons**.



On this page you can see the employee's current balances. Here you can also edit and add to the balances if needed. To edit the **Initial Balance** or the **As Of Date** simply click the Edit button and make the changes. Make sure to click the Apply Changes button to save your changes.

Employee: [Smith, Matt](#)

Values in the fields below will update all Absence Reasons that are selected in the action column.
 As of Date Add Balance to existing balance

[Add Absence Reasons](#)

Absence Reasons	Tracking Type	Initial Balance	As Of	Time Used	Current Balance
Personal Day	Daily	*3	07/01/2011	0	3

Make your changes here

Fields marked with an asterisk * are required.

You can also add brand new absence reason balances to the employee from here. To do this click the link **Add Absence Reasons**.

Values in the fields below will update all Absence Reasons that ar
 As of Date Add Balance to existing balance

[Add Absence Reasons](#) ←

Absence Reasons	Tracking Type	Initial Balance	As
Personal Day	Daily	*3	07/01/2

This will bring up a list of absence reasons you can choose from. Highlight the absence reason you want to give the employee a balance for and use the arrow button to move the absence reason into the selected area. You can select more than one absence reason at a time by holding down the Ctrl key while highlighting. Click Apply Changes when you are done.

Return to [Absence Reasons](#)

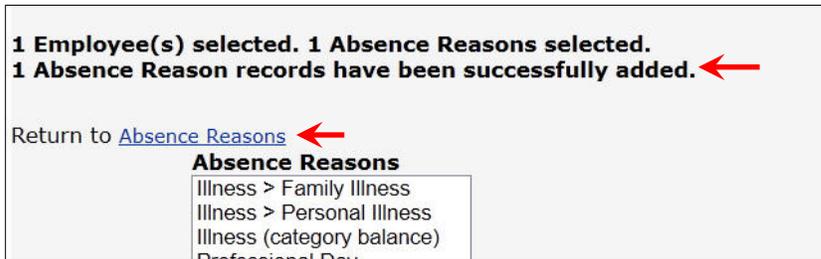
Absence Reasons

- Illness > Family Illness
- Illness > Personal Illness
- Illness (category balance)
- Professional Day
- Vacation

Selected Absence Reasons

Vacation

Once you have clicked Apply Changes you will see a message that the Absence Reason has been successfully added. Click the link **Return to Absence Reasons** to add a balance and As Of Date to the absence reason.



The balance for the new Absence Reason (Vacation in this example) will be zero and the As Of Date will be the current date. You can change the balance and the As Of Date by clicking the Edit button.

Add Absence Reasons				
Absence Reasons	Tracking Type	Initial Balance	As Of	Time U
Personal Day	Daily	*3	07/01/2011	0
Vacation	Daily	*0	09/02/2011	0

Fields marked w

Absence Balances and “Buckets”

Aesop also gives the option to allow absences to be defined at both the absence “reason” level and the absence “bucket” level. In other words, you will be able to group the usage of several different absence reasons and list them in a group or bucket. You will be able to add a balance to the bucket, to the bucket “list item”, or both.

Note: If you already have Absence Balances entered into Aesop – be very cautious making changes to these absence reasons or restructuring the “bucket” feature. We suggest contacting Aesop Client Services first!

To create a bucket go to **Reference Data > Absence Reason**



This will bring you to the Absence Reason Types page. To create a new bucket click the link “Add Absence Reason Type Bucket.”

Absence Reason Types

[Add Absence Reason Type](#) | [Add Absence Reason Type Bucket](#) ←

NOTE: If you already have Absence Reason Balances entered into Aesop – be very cautious making these Absence Reasons or restructuring the “bucket” feature. We suggest contacting Aesop Client Support first!

Name	Public to Employee	Phone Menu #	Needs Approval	Hold Until Approved	Enforce Balances	School
Illness					✓	
Family Illness	✓		✗	✗	✗	Victoria County Comm
Personal Illness	✓		✗	✗	✗	Victoria County Comm
Personal Day	✓		✓	✓	✓	Victoria County Comm

Now fill in the required information such as the name of the Bucket and which school and employee types you want the Bucket available for. For this example we are creating a Bereavement bucket.

Create Absence Reason Bucket

Name	Bereavement	School	Victoria County Community Schools
External ID		Employee Type	All
External ID 2			All remove
Data Analysis Category	Bereavement	Enforce Balances	<input type="checkbox"/>

Once we have filled in the above information we will now add the Bucket List items or the Absence Reasons that will be available within the Bucket. Since we are using Bereavement as an example we will create two types of bereavement, “Immediate Family” and “Non Immediate Family”.

To add an item to the list click the plus sign.

Details

Name	External ID	External ID 2	Menu #	Needs Public Approval	Hold Until Approved	Enforce Balances	
							+

When you add an item to the list you will first name it then choose if the absence reason will be Public (meaning the employee can choose this absence reason), if it needs approval, ect...

Once you have completed all the information click the Apply Changes button to save your Bucket.

Details

Name	External ID	External ID 2	Phone Menu #	Public to Employee	Needs Approval	Hold Until Approved	Enforce Balances	
Immediate Family				Yes	Yes	Yes	No	
Non Immediate Family				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
+								

Changes will not be saved until the Apply Changes button is clicked. Unsaved changes are color coded.

New Row Changed Row Deleted Row

→

If you click [Return to Absence Reason Type List](#) you will be taken back to your list of absence reasons and you can see the new bucket that has been created.

Name	Public to Employee	Phone Menu #	Needs Approval	Hold Until Approved	Enforce Balances
Bereavement					<input checked="" type="checkbox"/>
Immediate Family	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Non Immediate Family	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Personal Day	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sick					<input checked="" type="checkbox"/>
Family	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Personal	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Vacation	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Now that we have created the “Bucket” let’s look at how it will look when creating an absence. The employee will now be able to choose from two types of Bereavement when they select their absence reason.

Start Date	End Date	Absence Reason	Substitute Required	Absence Type	Start Time	End Time
09/07/2011 Wednesday	09/07/2011 Wednesday	Select One	Yes	Full Day	08:00 AM	03:00 PM
Sun Mon Tue Wed Thu Fri Sat <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>		Select One Absence Reason Bereavement > Immediate Family Bereavement > Non Immediate Family Illness > Family Illness Illness > Personal Illness Personal Day Professional Day Test 4 Vacation				

Create Absences on these days of the week within the date range specified above

Now when assigning absence reason balances to employees you can give a balance to the actual bucket. This is called the “Category Balance”. If an employee uses any of the absence reasons listed in that bucket Aesop will subtract from that bucket’s balance. Balances can also be given to the individual bucket list items.

Below you can see that buckets are now available in the list of available absence reasons for balances.

Employee: [Barnes, Matt](#)

Return to [Absence Reasons](#)

Absence Reasons

- [Bereavement > Immediate Family](#)
- [Bereavement > Non Immediate Family](#)
- [Bereavement \(category balance\)](#)
- [Illness > Family Illness](#)
- [Illness > Personal Illness](#)
- [Illness \(category balance\)](#)
- [Personal Day](#)
- [Professional Day](#)
- [Vacation](#)

Selected Absence Reasons

>

<

Below is an example of a category balance given.

Employee: [Barnes, Matt](#)

Values in the fields below will update all Absence Reasons that are selected in the action column.

As of Date Add Balance to existing balance

Add Absence Reasons

Absence Reasons	Tracking Type	Initial Balance	As Of	Time Used	Current Balance	Time From Pending Absences	Action	Delete	Log
→ Illness (category balance)	Daily	*20	07/01/2011	<input type="text" value="2"/>	<input type="text" value="18"/>	<input type="text" value="0"/>	<input type="checkbox"/>	<input type="checkbox"/>	Log
Personal Day	Daily	*3	07/01/2011	<input type="text" value="0"/>	<input type="text" value="3"/>	<input type="text" value="0"/>	<input type="checkbox"/>	<input type="checkbox"/>	Log

Fields marked with an asterisk * are required.

Reporting on Absence Balances

Now that you have assigned Absence Balances to your employees, Aesop will begin to track those balances. To view the current balance details for your employees you can go to the Employee's General Information Page or view the Absence Reason Balance Details report.

When viewing the Absence Reasons tab from the employee's General Information Page you can see their

1. Initial Balance
2. Time Used
3. Current Balance
4. Pending Absences

Duration Settings | **Absence Reasons** | Preferred Substitutes | Allocation Groups | Absence A

[Absence](#) | [Add Employee](#) | [Send Letter/Email](#)

Employee: Barnes, Matt
General Information
 Last Update: 8/30/2011 2:27:49 PM
[Login to Web Site](#)

Fields marked with an asterisk * are required.

Middle Name Last Name

Employee Types
 *

Alternate Login ID

Employee: Barnes, Matt

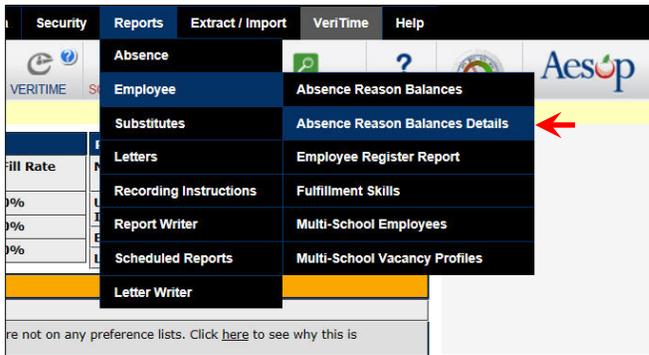
Values in the fields below will update all Absence Reasons that are selected in the action column.
 As of Date Add Balance to existing balance

Add Absence Reasons

Absence Reasons	Tracking Type	Initial Balance	As Of	Time Used	Current Balance	Time From Pending Absences	Action	Delete	Log
Illness (category balance)	Daily	* <input type="text" value="20"/>	<input type="text" value="07/01/2011"/>	<input type="text" value="2"/>	<input type="text" value="18"/>	<input type="text" value="0"/>	<input type="checkbox"/>	<input type="checkbox"/>	Log
Personal Day	Daily	* <input type="text" value="3"/>	<input type="text" value="07/01/2011"/>	<input type="text" value="0"/>	<input type="text" value="3"/>	<input type="text" value="0"/>	<input type="checkbox"/>	<input type="checkbox"/>	Log

Fields marked with an asterisk * are required.

To get to the **Absence Reason Balance Details Report** from the Black Menu Bar go to **Reports > Employees > Absence Reason Balance Details**



Here is an example of what the report looks like.

Absence Reason Balance Details [Return to Report Menu](#)

Run Date: 09/07/2011 School: View All Active: Yes Employee: View All

Absence Reason: View All

Current Balance: View All

Print with page breaks

School	Employee	Absence Reason	Tracking Type	Initial Balance	As Of	Used Balance	Current Balance
Ackbar High School	Cody, Jeff	Personal Day	Daily	3	7/1/2011	0	3
Ackbar High School	Cool, Joe	Personal Day	Daily	3	7/1/2011	2	1
Ackbar High School	Guy, Test Fail	Personal Day	Daily	3	7/1/2011	0	3
Ackbar High School	Joyner, Brandon	Illness (category balance)	Daily	21	7/1/2011	0	21
		Personal Day	Daily	3	7/1/2011	1	2
Ackbar High School	Mac, Jimmy	Personal Day	Daily	3	7/1/2011	0	3
Ackbar High School	Rex, Max	Personal Day	Daily	3	7/1/2011	0	3
Dell Middle School	Assaad, Tamer	Personal Day	Daily	3	7/1/2011	0	3
Dell Middle School	Barnes, Matt	Illness (category balance)	Daily	20	7/1/2011	2	18
		Personal Day	Daily	3	7/1/2011	0	3