COLUMBIA UNIVERSITY
Human Resources

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**.

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

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	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 succesfully 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 10/01/2018	Qtr. End Date 12/31/2018	Search

Quarterly Closeout History

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	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

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	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 21st	November 15th
Quarter 2	October 1st - December 31st	January 1st	January 21st	February 15th
Quarter 3	January 1st - March 31st	April 1st	April 21st	May 16th
Quarter 4	April 1st - June 30th	July 1st	July 21st	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