

### 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 <sup>st</sup>    | November 15th          |
| Quarter 2 | October 1st - December 31st | January 1st        | January 21 <sup>st</sup>    | February 15th          |
| Quarter 3 | January 1st - March 31st    | April 1st          | April 21 <sup>st</sup>      | May 16th               |
| Quarter 4 | April 1st - June 30th       | July 1st           | July 21 <sup>st</sup>       | 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                    | <span style="border: 1px solid gray; padding: 2px 5px; background-color: #f0f0f0;">Select</span> | Active      | Ella       | Leonetti         |     | Not Submitted |                     |                         |  |
| 2                    | <span style="border: 1px solid gray; padding: 2px 5px; background-color: #f0f0f0;">Select</span> | Active      | Horace     | Lodato           |     | Approved      | 01/07/19 12:04:55PM |                         |  |