Time, Attendance and Leave (TAL) Training Guide For Employees
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1 Overview

The purpose of the Time, Attendance and Leave (TAL) system is to ensure employee’s time and attendance are recorded properly and routed through the appropriate channels for approval.

**NOTE:** Emails to the user regarding TAL notifications and updates will come from EcotimeAlert@hbscorp.com.

2 Employee’s Responsibility

1. **Time Reporting:** Hourly employees will enter time by using either the web clock ([https://ouhsc.ecotimebyhbs.com/ecotimeWCssso](https://ouhsc.ecotimebyhbs.com/ecotimeWCssso)) or the wall clock. Salaried employees will only need to enter exception time (i.e., leave time) using the TAL website ([https://ouhsc.ecotimebyhbs.com/ecotimesso](https://ouhsc.ecotimebyhbs.com/ecotimesso)).

2. **Leave Requests:** Submit leave requests to his/her supervisor for approval.

3. **Reviewing Timesheet:** Review time and leave entry on his/her timesheet prior to, but no later than, the last working day of the pay period.

4. **Requesting Corrections:** Inform his/her supervisor or payroll coordinator of any edits and/or corrections prior to the end of the pay period or as soon as possible.

5. **Completing Timesheet:** Electronically approve the timesheet by marking it as complete. This will allow the timesheet to be reviewed and approved by the employee’s designated supervisor and payroll coordinator. Employees without computer access will have an alternate procedure outlined by the department.

**NOTE:** Hourly employees that do not have access to the TAL system (due to not having computer access or not being on the OUHSC network) should use a paper timesheet to log hours. The paper timesheet can be found on the Payroll Services page under Forms & Tools at [http://www.ouhsc.edu/financialservices/Payroll/default.asp](http://www.ouhsc.edu/financialservices/Payroll/default.asp) named “Timesheet for Hourly Employees – Paper Form.” Supervisors must enter this time in TAL. Employees with computer access off the campus network can approve the timesheet in TAL, otherwise they can sign and approve the paper timesheet. The final paper timesheet should be attached in TAL to the relevant pay period.

Salary employees that are a <.75 FTE that do not have access to the TAL system will be asked by their department to use a paper timesheet to track ACA (Affordable Care Act).
Act) hours. The paper timesheet for tracking ACA hours can be found on the TAL Resources page at [http://www.ouhsc.edu/financialservices/Payroll/default.asp](http://www.ouhsc.edu/financialservices/Payroll/default.asp) named “ACA Tracking (Excel)” or “ACA Tracking (PDF).” This completed form should be scanned and attached to the relevant timesheet in TAL.

**NOTE:** Temporary employees will use the TAL system to record time worked. If they do not have access to the TAL system, they may utilize a paper timesheet where the supervisor or payroll coordinator will need to record their hours. Supervisors or payroll coordinators should scan and attach this paper timesheet to the relevant timesheet in TAL. Temporary employees will be paid on the same bi-weekly cycle as all other University employees.

### 3 Signing into the Web Clock (Hourly Employees Only)

Hourly employees with web access will utilize the web clock to clock in and clock out daily via [https://ouhsc.ecotimebyhbs.com/ecotimeWCsso](https://ouhsc.ecotimebyhbs.com/ecotimeWCsso).

**NOTE:**
- An hourly employee must use the same method to clock out as they used to clock in. (Example: The TAL system will not recognize a clock out punch on the web clock if the clock in punch was done on a wall clock, and vice-versa.)
- The web clock link CANNOT be accessed outside of the OUHSC network.
- University policy for time rounding rules can be located at [http://www.ouhsc.edu/policy/#300, Section 313](http://www.ouhsc.edu/policy/#300).

1. Go to [https://ouhsc.ecotimebyhbs.com/ecotimeWCsso](https://ouhsc.ecotimebyhbs.com/ecotimeWCsso).
2. Enter ID and password: Enter your OUHSC User ID and password, click Log On or press enter. If you do not know your OUHSC User ID and/or password, contact the IT Service Desk at (405) 271-2203.
3. Clock In/Out: Click In or Out button.

4. Signing into a Wall Clock (Hourly Employees Only)

Wall clocks are available for employees who do not have computer access. The wall clock is a touchscreen device mounted on the wall that communicates with the TAL system. All wall clocks are touchscreen devices.

NOTE:
- An hourly employee must use the same method to clock out as they used to clock in. (Example: The TAL system will not recognize a clock out punch on the web clock if the clock in punch was done on a wall clock, and vice-versa.) Employees may choose to clock in and clock out on two or more wall clocks throughout any given day without any errors.
- University policy for time rounding rules can be located at http://www.ouhsc.edu/policy/#300, Section 313.

1. Sign In:
   a. Swipe ID: Swipe the black strip of your OUHSC OneCard (with the picture side up) along the bottom slot of the wall clock.
   
   OR

   b. Enter ID: If you do not have your OneCard, enter your OUHSC employee ID (six-digit HR employee number). If you type the number incorrectly, it can be corrected by using the arrow.

2. Clock In/Out: Verify your name and click the relevant button, for example, In, Out, Exit, and More. Definitions of each button on the wall clock are below.
Wall clock button definitions:

<table>
<thead>
<tr>
<th>Display</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>In</td>
<td>This button is used to clock in at the beginning of a shift, including returning from meal breaks.</td>
</tr>
<tr>
<td>Out</td>
<td>This button is used to clock out at the end of a shift, including the start of meal breaks.</td>
</tr>
<tr>
<td>Exit</td>
<td>This button gives the ability to cancel the operation and go back to the beginning or back to the previous screen.</td>
</tr>
<tr>
<td>More</td>
<td>This button gives access to additional items, outlined below. Employees should not utilize the buttons outlined below unless instructed to do so.</td>
</tr>
<tr>
<td>In With</td>
<td>This button is used only for employees who are clocking in as a standardized patient. The next screen will prompt the user to select which standardized patient code to use for his/her shift in a drop down menu.</td>
</tr>
<tr>
<td>Transfer</td>
<td>This button is used to add or change a job code during a shift.</td>
</tr>
<tr>
<td>In Call Back</td>
<td>This button is used only when a user is clocking in while on call.</td>
</tr>
</tbody>
</table>

5 Standardized Patients

Standardized Patients can access TAL using the Web Clock link https://ouhsc.ecotimebyhbs.com/ecotimeWCsso or the wall clock.

Web Clock Instructions


2. Enter your OUHSC User ID and password, click Log On or press enter. If you do not know your OUHSC User ID and/or password, contact the IT Service Desk at (405) 271-2203.
3. Clock In/Out: Click In or Out button.

   ![Clock In/Out Image]

4. Pay Code: This screen will allow you to select the correct pay code from a drop down list.

   ![Pay Code Image]

Wall Clock Instructions

1. Sign In:
   
   a. Swipe ID: Swipe the black strip of your OUHSC OneCard (with the picture side up) along the bottom slot of the wall clock.

   OR

   b. Enter ID: If you do not have your OneCard, enter your OUHSC employee ID (six-digit HR employee number). If you type the number incorrectly, it can be corrected by using the arrow.

2. Clock In/Out: Verify your name and click the relevant button, for example, In, Out, Exit, and More. Do not use In button to clock in. ONLY use the More button when clocking in.

3. In With: Select the correct pay code from a list and then click OK. The Transfer button will allow the user to transfer from one pay code to another without having to clock out. Employees also have the option to push the Back button and Cancel button.
6 General Navigation of TAL Website

6.1 Signing In

All employees (hourly and salary) can sign into TAL using his/her OUHSC User ID and password from any location (on/off campus).

a. Go to https://ouhsc.ecotimebyhbs.com/ecotimesso/.

b. Enter your OUHSC Network ID and Password, click Log On or press enter.

6.2 Menu Bar

A menu bar is located at the top of the screen. Each tab allows you to perform particular functions. Click on a tab to display those functions (see screenshot below).

Employees have access to the tasks listed in the screenshot below: **Timesheet**, **Balances**, **TimeOff Request**, and **FMLA Request**.
6.3 General Navigation: Buttons

Buttons with icons give the user quick access to commands, procedures, and functions. Below is a table that defines the actions/description of each button.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td>Save &amp; Calculate – Saves and calculates the data on the timesheet.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Reset – Resets all changes.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Notes – View, add and edit notes.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Attachment – add an attachment to a timesheet. Attachments can be added by employees, supervisors, or payroll coordinators. They are viewable by all who have access to the timesheet, but can only be deleted by the person who added them.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Complete – Certifies that timesheet is complete and ready for supervisor to review and approve. This is done at the end of the pay period.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Remove Complete – Removes completion status from timesheet. Do this when changes are needed.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Calculate Timesheet – Calculates any balance adjustments that may apply. Shows how time entered will cascade.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Balances – Displays current leave balances up to the present day.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Timesheet Audit – Shows all changes made to the selected timesheet.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Print – Prints the timesheet.</td>
</tr>
</tbody>
</table>

6.4 Errors/Warnings on Timesheet

Warnings/Errors can be seen on the timesheet as an icon next to the day in which they occur.

**Warning:** Review the timesheet and ensure it is accurate.

**Error:** Must be corrected before timesheets are locked.
List of Warnings

<table>
<thead>
<tr>
<th>Warning Flag</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>FMLA Exceed Planned Hours</td>
</tr>
<tr>
<td>C</td>
<td>Paid Leave Shift &gt; Shift</td>
</tr>
<tr>
<td>G</td>
<td>Hours/Day &gt; 12</td>
</tr>
<tr>
<td>H</td>
<td>Hours/Week &gt; 70</td>
</tr>
<tr>
<td>J</td>
<td>Invalid Holiday</td>
</tr>
<tr>
<td>K</td>
<td>&lt; Hours/Week</td>
</tr>
<tr>
<td>O</td>
<td>Insufficient PTO</td>
</tr>
<tr>
<td>P</td>
<td>Insufficient Sick</td>
</tr>
<tr>
<td>Q</td>
<td>Insufficient Vacation</td>
</tr>
<tr>
<td>R</td>
<td>Insufficient ESL</td>
</tr>
<tr>
<td>S</td>
<td>Insufficient Comp</td>
</tr>
</tbody>
</table>

List of Errors

<table>
<thead>
<tr>
<th>Error Flag</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>FMLA Exceed Yearly Hours</td>
</tr>
<tr>
<td>3</td>
<td>FMLA Outside of Interval</td>
</tr>
<tr>
<td>6</td>
<td>Activity Required</td>
</tr>
<tr>
<td>B</td>
<td>Time In = Time Out</td>
</tr>
<tr>
<td>D</td>
<td>Employee Not Active</td>
</tr>
<tr>
<td>E</td>
<td>Employee Not Found</td>
</tr>
<tr>
<td>F</td>
<td>&gt; 24 Hours/Day</td>
</tr>
<tr>
<td>I</td>
<td>Notes Required</td>
</tr>
<tr>
<td>M</td>
<td>Hours Before Hire Date</td>
</tr>
</tbody>
</table>

7 Employee Tasks

Timesheet and web clock options will differ for hourly (non-exempt) and salaried (exempt) employees.

7.1 Correcting timesheet entries as an Exempt Employee

Exempt employees:

- Allowed to review and edit all parts within their own timesheet
- Will only record exception time on their timesheet

1. Access the Timesheet: Click Timesheet under the Employee Tasks tab
2. Select pay period and click go:
3. Add exception time:
   a. **Reason** – Chose the reason for the absence from the drop down menu.
   b. **Enter** – Enter the exception time on the relevant day.

4. Save: Click on the button. View updated timesheet.

### 7.2 Timesheets for Hourly Employees

**Hourly Employees:**
- Allowed to review and complete their own timesheet
- Can add Notes or Attachments
- Should clock in using the web or wall clocks to record work time
- Leave is logged by approval of a **TimeOff Request** or entered by a supervisor

**Viewing a Timesheet**

1. Access the Timesheet: Click **Timesheet** under the **Employee Tasks** tab.
2. Select pay period and click go to display a timesheet:
3. A timesheet has two sections: **input summary** and **worked hours**.
   a. Input Summary: Summary of time submitted for each day during the pay period.
      - **Worked** row shows the hours/minutes that an employee worked by clocking in/out via the web clock and/or wall clock for that particular day.
      - **Exceptions** row shows the exception hours recorded for an employee on that particular day. Examples of exception time are Leave Taken Scheduled, Leave Taken Unscheduled, Admin Leave, etc.

   ![Timesheet Summary Image]

   b. Worked Hours: Displays the actual time recorded from the web clock and/or wall clock.

   ![Worked Hours on Wednesday 03/13/19 Image]

**Adding Notes to a Timesheet:**

1. Click the note icon:

   ![Notes for 02/08/2016 - 02/21/2015 - B1 Image]
2. Type a note: Notes can be seen by the employee, their Supervisor and Payroll Coordinator. Protected Health Information does not belong in the notes section.

3. Submit the note: All notes submitted are permanent. Click Submit Note. The system confirms submission of the note by displaying it below the text box:

<table>
<thead>
<tr>
<th>Entered By/Date</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kiner, Lisa Christine 3/3/2015 5:36:27 PM</td>
<td>Testing timesheet notes</td>
</tr>
</tbody>
</table>

4. Close the note window: Click on the Close Window button when finished.

**Compensatory Time Functionality**

Employees who are eligible for overtime may choose to accumulate compensatory hours in lieu of overtime payments. Compensatory hours are earned at the time the hours are worked and used as leave hours at another time. Employees should discuss these options with their supervisor. A Comp Time Agreement must be signed by the employee to earn compensatory hours. If approved, the supervisor must change the employee in the TAL system to a compensatory time-earning employee.

**Marking a Timesheet as Complete**

Employees are required to mark timesheets as complete at the end of each pay period.

1. Review timesheet: Look over hours, and add notes if needed.

2. Mark timesheet as complete: Once correct click in the upper right hand corner of the screen. The system will display the following message:

   By pressing the Complete button I certify that I have accurately recorded all hours that I have worked or taken as time off in accordance with applicable OUHSC Policy and guidelines. I understand that I am subject to discipline up to and including termination if I have failed to record or have misrepresented any information on my timesheet.

   Read the message, click OK.

**NOTE:** Hourly employees must inform your supervisor or payroll coordinator of any edits and/or corrections before the end of the pay period. Changes must be made, timesheet completed and approved before timesheets are locked.
Salaried employees do not enter regular work hours and do not clock in/out via web clocks or wall clocks. Salaried employees working more than .75 FTE only need to add/edit/view exception time in the TAL system before submitting timesheets.

Exception time includes: Leave Taken Unscheduled, Admin Leave, Jury Duty, Professional Leave, Holiday Pay, Leave Taken Scheduled, etc.

**Exception Time Reporting:**

1. Click **Timesheet** under the **Employee Tasks** tab, select the appropriate pay period from the drop down menu and click Go.

2. Use the drop down list under **Hours Type** to select the type of leave used.

3. Enter the hours in the appropriate day column. Hours can be entered in quarter hour increments.

4. Save the exceptions, click **** at the top of the timesheet screen.

5. If invalid time was entered into a field, the system will mark the day with the error by displaying an icon like this: ![Mon 02/23](image). The warnings/errors will also be described in the **Message Descriptions** area at the bottom.

**NOTE:** Error letter K should be ignored by salaried employees.

**Adding Timesheet Notes:**

Employees have the ability to add notes to a timesheet that are pertinent to time reporting. All notes entered are permanent.

1. Click the note icon: ![Note Icon](image). A screen is then displayed which allows the user to add a note as shown below:
2. Type the text in the box provided. Notes can be seen by the employee, their Supervisor and Payroll Coordinator. Protected Health Information (PHI) does not belong in the notes section.

3. Click on the **Submit Note** button. The system confirms submission of the note by displaying it below the text box:

   ![Notes Example]

4. Click on **Close Window**.

**Marking a Timesheet Complete**

Employees are required to mark timesheets as complete at the end of each pay period.

1. Review timesheet: Look over hours, and add notes if needed.

2. Mark timesheet as complete: Once correct click ![Complete Button] in the upper right hand corner of the screen. The system will display the following message:

   ![Certificate Message]

   Read the message, click **OK**.
Changing a Timesheet

If an employee marks a timesheet as complete, but later determines that changes are needed, the timesheet can be changed; however, the steps he/she takes to change the timesheet depend on the following scenarios.

Scenario 1 – Changing an unapproved completed timesheet: Click the \( \text{button} \). The timesheet reverts from (Not Approved, Completed) to (Not Approved Not Completed). Make the necessary changes, save and click complete so that the timesheet is once again complete and awaiting approval.

Scenario 2 – Changing an approved timesheet: The save and complete buttons will not be available if the timesheet has been reviewed and approved by the supervisor and/or payroll coordinator. The timesheet will display the following message: “Approved timesheet is Read only.” In this case, contact your supervisor and/or payroll coordinator so they can unapprove the timesheet. After it is unapproved, follow the steps in Scenario 1.

Scenario 3 – Supervisor or Payroll Coordinator changes an employee’s timesheet: If the supervisor or payroll coordinator makes changes to a timesheet, the approval (if previously approved) is removed and the timesheet is returned to you. In this situation, the timesheet displays the following message: “You must complete timesheet again because changes have been made.” The TAL system changes the status from (Approved, Completed) to (Not Approved Not Completed). After reviewing changes, save the timesheet and click \( \text{button} \) to complete.
7.4 Leave Requests Submitted by an Employee

Submitting a Leave Request

An employee can request leave in advance for FMLA or Regular time. When supervisors approve leave requests, the hours will automatically populate to the relevant timesheet.

1. Click on the **TimeOff Request** tab located on the **Employee Tasks** tab. The screen will list any previously submitted requests along with the following submission tool:

2. Enter From and To dates for leave period: Click 🗓 to select a date from the calendar; the calendar highlights today’s date by default. Or type the date in the field using the format mm/dd/yyyy.

3. Select **Leave Taken Scheduled** in the drop down menu under **Type**. If you have a pre-approved FMLA event, you will have the option in the drop down to request time off for this event.

**NOTE:** The TAL system cascades leave balances properly. The system will first check to see if you have any hours in your Banked holiday balance. If you have a balance available, the system will use it until it is forced to move to the next option. Supervisors and Payroll Coordinators will not have to track this time outside the TAL system. Cascading leave keeps all employees compliant with the staff handbook guidelines.
4. Click the **Submit** button. A leave request detail screen will be displayed.

5. The system defaults hours based on the employees FTE, but employees can adjust the number of hours as needed. If a partial day is requested, the system will not show the hours the employee will be out (i.e., 8am-noon) but the employee can put the number of hours needed and add the time to the notes section of the request.

**NOTE:** If an employee’s schedule is on a weekend the system will not default the number of hours in the leave request. The employee must fill them in before submitting.

6. If a note is required, the user can add one at this time. This note will be seen by the supervisor and payroll coordinator, Personal Health Information does not belong in the notes section.

7. Click **Submit**. Next, click on **Return to Time Off Summary** where it will display your pending request as seen below:

The display indicates that the leave request is pending approval and can be deleted if necessary prior to supervisor approval.

**NOTE:** Clicking **Return to Time Off Summary** without first clicking **Submit** will take you back to the **TimeOff Request** page without submitting your request, and you will need to re-enter your request details.
8. Supervisors will receive notification from the TAL system that a request is awaiting approval. Emails to the supervisor may be delayed as much as an hour. Once the leave request is approved or denied, the employee will receive notification via email and on the Messages tab in the TAL system.

**Viewing and Editing Leave Requests**

The user can view and edit submitted leave requests on the TimeOff Request screen.

1. **View or edit a pending request**, click the date hyperlink and review, edit, and read/submit notes.

2. **Edit an approved or denied request**, the employee needs to contact their supervisor and request the supervisor change the leave request status back to “Pending” so the employee can edit it.

**NOTE:** Leave requests for future pay periods will remain in processing status until the pay period occurs. Leave requests for the current pay period will immediately be processed and cannot be changed by an hourly employee.

### 7.5 Balances

**Balance Screen Definitions:**

<table>
<thead>
<tr>
<th>Column</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category</td>
<td>Type of leave.</td>
</tr>
<tr>
<td>Starting Balance</td>
<td>Beginning balance for the period.</td>
</tr>
<tr>
<td>Earned</td>
<td>Total amount of leave earned to date.</td>
</tr>
<tr>
<td>Taken</td>
<td>Amount of time employee has used or has been paid for, which has not been previously deducted from the starting balance.</td>
</tr>
<tr>
<td>Current Balance</td>
<td>Current amount for the period to which the employee is entitled. This would reflect the starting balance + leave earned – leave taken.</td>
</tr>
<tr>
<td>Future Approved Leave Requests</td>
<td>Leave that has been approved by supervisor for a future period not yet populated on a timesheet.</td>
</tr>
</tbody>
</table>
Viewing Balances

To view balances, click on the **Balances** tab located on the **Employee Tasks** bar. The TAL system displays all balances by category.

1. Click on the specific leave type under **Category** to see leave details. The categories shown above will vary depending on the employee.
2. To see leave balances as of a previous date, enter a date in the box “Please select a date to calculate balances” and click GO. The results will be the balances as of the chosen date.

3. The user may also access balances from a timesheet by clicking the **balances** icon from the toolbar.
Accruals

Accruals are run after every pay period or annually based on the accrual type. Employees that are benefit/paid leave eligible can see the accrual calculations at the Leave Accrual for Health Sciences Center Programs on the HR website. Postdoctoral Research Fellows and/or Residents, please see your relative handbook for leave policies and schedules. General employee paid leave balances that are accrued biweekly are posted around Wednesday following the pay period for which they are accrued. Leave is accrued after a period. Leave is available for use as soon as it is posted to the balance tables.

7.6 On Call

This section shows the employee how to record time when On Call.

1. Employee is placed “on call” by their supervisor.
2. Employee is called into work during on call hours the TAL system will then record these hours as Call Back Worked (CBW) and show this time on the timesheet. Employees must clock in one of the following ways:
   a. Web Clock Call Back - use the button
   b. Wall Clock Call Back - use the button which is found under the More section of the Wall Clock
7.7 Banked Holiday

The TAL system allows you to bank holiday hours for hours that you work on a University defined holiday.

**Recording Banked Holiday – Salary Employees**

1. Click **Timesheet** located on the **Employee Tasks** tab.

---

1. Holiday pay is automatically populated to your timesheet. **Holiday Pay hours are earned based on your FTE.** Reduce the number of holiday hours by the number of hours you worked. Click Save.
   - Example: You earn 8.00 hours holiday, but you worked 2. Change the holiday hours on that day to 6. This will put 2 hours toward your Banked Holiday. You will be paid 6 hours holiday and the remaining time as regular work time.
2. Once the period is closed, to view the holiday balance, click **Balances** under the **Employee Tasks** bar.
   - **NOTE:** the Current Balance for **Holiday** is 2.00, which is what the employee in the example worked that day. Cascading rules will apply when using Holiday balances.

![Balance Screen](image)

**Bank Holiday – Hourly Employees**

The TAL system allows you to bank holiday hours for hours that you work on a University defined holiday.

1. Clock in and out for hours worked.
2. Supervisors need to reduce the holiday hours by the number of hours worked so the overall hours for the day equals the employees normal working hours.
   - **Example:** If you generally earn 8 hours a day holiday pay and you work 6 hours, your holiday hours should be reduced to 2 hours for that day so your total hours is 8. The remaining holiday hours will appear in your holiday leave balance and be used by TAL the next time you take leave.
3. Once the period is closed, to view the holiday balance, click **Balances** under on the **Employee Tasks** bar.
   - **NOTE:** the Current Balance for **Holiday** is 6.00, which is what the employee in the example worked that day. Cascading rules will apply when using Holiday balances.

<table>
<thead>
<tr>
<th>Category</th>
<th>Starting Balance</th>
<th>Earned</th>
<th>Taken</th>
<th>Current Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>PTQ</td>
<td>142.20</td>
<td>815.21</td>
<td>767.25</td>
<td>190.16</td>
</tr>
<tr>
<td>Comp</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>ESL</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Holiday</td>
<td>0.00</td>
<td>344.00</td>
<td>336.00</td>
<td>6.00</td>
</tr>
</tbody>
</table>

8  FMLA Requests

The FMLA section of the system allows employees to request FMLA, review FMLA event statuses, and track FMLA balances.

**FMLA Request Page Details:**

1. Navigate to **Employee Tasks** tab and select the **FMLA Request** tab:

2. Selecting the **FMLA Request** tab will take employees to the FMLA Request page. Along the top of the FMLA page is a toolbar that the employee will use to make the request.
3. Toolbars contain buttons that give the user quick access to commands, procedures, and functions. Below is a table that defines the actions/description of each button.

<table>
<thead>
<tr>
<th>Icon Example</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Save – Saves the data on the page.</td>
</tr>
<tr>
<td></td>
<td>Refresh – Refresh all data on the page.</td>
</tr>
<tr>
<td></td>
<td>Edit – Allows changes to be made to the data.</td>
</tr>
<tr>
<td></td>
<td>Add – Allows an FMLA event to be added.</td>
</tr>
<tr>
<td></td>
<td>Delete – Removes FMLA event(s) from the page.</td>
</tr>
</tbody>
</table>

4. The FMLA page has three sections.
   - The first section allows the employee to make an FMLA request:

   ![FMLA Request Form](image)

   - The second section, titled **FMLA Balance Year**, allows an employee to view the number of hours allowed in the FMLA year. The employee can also view any cap on the number of hours available:

   ![FMLA Balance Year](image)

   - The third section, titled **Employee Requests**, allows an employee to view the data on each FMLA request. The section shows when a request was made, the dates for the FMLA event, the FMLA reason, and the status of the request:
To make an FMLA Request:

1. Select an FMLA event in the Reason Code dropdown box:

![Reason Code Dropdown]

2. Enter a start date for the FMLA event:

![Start Date]

3. Enter an end date for the FMLA event:

![End Date]
**Note:** The employee has the option to choose an intermittent FMLA event by checking the intermittent box:

![FMLA Event Selection](image)

4. Click the **button.** NOTE: The request cannot be processed if the data is not saved.

5. When a request has been saved, the event will appear in the **Employee Requests** section of the page. The **Status** column will show as Pending until the event is either approved or denied:

![Employee Requests](image)

6. When the FMLA Coordinator has reviewed the returned FMLA paperwork, a designation will be made. The designation will be reflected in the **Employee Requests** section of the page. The **Status** column will show as either Approved or Denied:

![Employee Requests](image)

### 8.1 Messages

**FMLA Request Received:**

When an employee has requested FMLA, a web message and email will be sent to the employee as shown below:

```
Your FMLA request for FMLA Employee Health Condition was received on 05/06/2015.
Your FMLA Representatives are: Jessica Rodriguez, jessica.a.rodriguez@ouhsc.edu
Please complete and return the required forms by the due dates.
```
In addition, a message will alert the Payroll Coordinator and Leave Coordinator that an employee has requested FMLA. The Leave Coordinator will process and send all FMLA paperwork via email, ensuring that the appropriate Payroll Coordinator is included in all correspondence.

**FMLA Paperwork Due:**

When an employee requests FMLA, they will receive an initial notification via email and regular mail containing a document that will need to be completed by a healthcare provider. Employees have 15 calendar days to return this paperwork. If paperwork has not been returned by day 10, the employee will receive the following message reminding them of the due date:

> This is a reminder that paperwork for the FMLA Employee Health Condition request, submitted on 05/06/2015, needs to be processed. Please complete and return the required forms by the due date.

**Designation Made:**

When a designation has been made for an FMLA request, the employee will receive the following message:

> Designation Notice
> 
> To: 04/25/2015
> 
> Your request for FMLA Health of Family Member has been approved on 04/26/2015 by Rodriguez Jessica. If you have any questions about this decision please contact HR Representative Jessica Rodriguez (jessica.e.rodriguez@ouhsc.edu).

**FMLA Leave Request Submitted:**

When a continuous FMLA request has been approved, the Leave Coordinator will submit those approved leave hours. Those hours will automatically appear on an employee’s timesheet. The employee will receive the following message:

> Your time off request starting 04/20/2015 and ending 05/02/2015 has been set to Approved on 04/30/2015.
> Your time off request starting 05/03/2015 and ending 05/16/2015 has been set to Approved on 04/30/2015.
> Your time off request starting 05/17/2015 and ending 05/30/2015 has been set to Approved on 04/30/2015.
> Your time off request starting 05/31/2015 and ending 06/13/2015 has been set to Approved on 04/30/2015.
> Your time off request starting 06/14/2015 and ending 06/27/2015 has been set to Approved on 04/30/2015.
> Your time off request starting 06/28/2015 and ending 07/11/2015 has been set to Approved on 04/30/2015.
FMLA Outside of the Approved Interval:

If an employee attempts to enter FMLA time on a timesheet that is outside of the approved interval, the employee will receive a message as seen below:

![FMLA Message Example](image)

This error must be corrected before timesheets are finalized.

8.2 Viewing FMLA Leave on Timesheets

Continuous FMLA Leave – Exempt Employee

When an employee has been approved for continuous FMLA leave, the FMLA Leave Coordinator will submit an approved leave request for that employee. Those FMLA hours will automatically transfer to the employee’s timesheet as shown below:

![Continuous FMLA Leave - Timesheet Example](image)
The employee will need to ensure that the actual FMLA leave is correct on the timesheet. Any FMLA leave not taken should be deleted from the timesheet.

The user can delete the unnecessary hours and click the button.

**Continuous FMLA Leave - Hourly Employee:**

When an employee has been approved for continuous FMLA leave, the Leave Coordinator will submit an approved leave request for that employee. Those FMLA hours will automatically transfer to the employee’s timesheet as shown below:

<table>
<thead>
<tr>
<th>Hours Type</th>
<th>Sun 11/18</th>
<th>Mon 11/19</th>
<th>Tue 11/20</th>
<th>Wed 11/21</th>
<th>Thu 11/22</th>
<th>Fri 11/23</th>
<th>Sat 11/24</th>
<th>Week Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday Pay</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
</tr>
<tr>
<td>Leave Taken Scheduled</td>
<td>8.00</td>
<td>8.00</td>
<td>8.00</td>
<td>8.00</td>
<td>40.00</td>
<td>8.00</td>
<td>8.00</td>
<td>21.00</td>
</tr>
<tr>
<td>Totals</td>
<td>0.00</td>
<td>8.00</td>
<td>8.00</td>
<td>8.00</td>
<td>40.00</td>
<td>8.00</td>
<td>8.00</td>
<td>21.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Comp. Time Election</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leave Without Pay FMLA</td>
</tr>
<tr>
<td>Holiday Pay</td>
</tr>
<tr>
<td>Paid Leave</td>
</tr>
</tbody>
</table>

The employee will need to notify their supervisor or payroll coordinator immediately to remove unnecessary FMLA for a timesheet.
Intermittent FMLA Leave

The following steps are used to edit an exempt employee’s timesheet.

**Step 1 – Select the correct payroll period.** Click on the Timesheet Tab under Employee Tasks. Select the payroll period.

The system will display the employee’s detailed timesheet:

**Step 3 – Make the changes:** Make the appropriate changes.

*Note:* Select Leave Taken Scheduled for all FMLA events. If the employee has an approved event, a dropdown box will appear allowing the appropriate event to be selected. The TAL system will cascade to paid or leave without pay based on the employees leave balance.

**Step 4 – Save the changes:** To save the changes, click on the button.
NOTE: Hourly employees are not able to enter FMLA intermittent leave to their timesheet and will need to notify their supervisor or payroll coordinator immediately. Salary employees can edit their own timesheets.

### 8.3 Errors/Warnings

#### List of Warnings

<table>
<thead>
<tr>
<th>Data Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>FMLA Exceed Planned Hours</td>
</tr>
</tbody>
</table>

**Warning 1 – FMLA Exceed Planned Hours.** This warning will appear if more hours are input into the timesheet than what was approved.

#### List of Errors

<table>
<thead>
<tr>
<th>Data Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>FMLA Exceed Yearly Hours</td>
</tr>
<tr>
<td>3</td>
<td>FMLA Outside of Interval</td>
</tr>
</tbody>
</table>

**Error 2 – FMLA Exceed Yearly Hours.** This error will appear if the more hours are input into the timesheet than what is allotted in an FMLA year.

**Error 3 – FMLA outside of Interval.** This error will appear if hours are input into the timesheet outside of the approved FMLA time period.
8.4 Balances

Viewing Employee FMLA Balances

Employees can view their own FMLA balances. Click **Balances** under **Employee Tasks**. The TAL system displays all balances (accruals) for employees by category. Only employees on approved FMLA will display an FMLA balance.

The FMLA balance screen will display the following rows:

**Each FMLA event** – This displays the beginning and ending dates for each approved event.

**FMLA Year** – This displays the beginning and ending dates for the FMLA year.

The FMLA balance screen will display the following columns:

**FMLA Period** – This is the time period for which the employee has an approved FMLA event/year

**Starting Balance** – This is the number of hours approved for the FMLA event/year

**Taken** – This is the number of hours used for FMLA event/year

**Current** – This is the number of hours remaining for the approved FMLA event/year
9 Messages and Emails

The Messages tab is seen on the Menu Bar. After successfully signing in, the system will open on the Messages tab for all salaried employees.

If the user has any messages, they will appear below the following welcome message:

![Welcome to the TAL System!]

Please follow these steps if you have a question about using the TAL system:
1. Refer to the user’s manual and information available on the Payroll Services website [https://www.outsc.edu/financialservices/PSpayroll/default.asp](https://www.outsc.edu/financialservices/PSpayroll/default.asp).
2. Contact your departmental payroll coordinator.
3. Contact Payroll Services (905) 271-2055 or by email Payroll.Services@outsc.edu.

**NOTE:** Be sure to read the message(s) for important information and take action, if required. Some messages will expire after a set amount of time and/or once an issue has been resolved.

Messages that appear on this screen will include:

- Potential Overtime
- FMLA request/approved/denied
- FMLA time charged outside of an incident
- Time Off Request/Time Off Request Status Change
- Messages sent by Payroll Services

Emails are generated by the TAL system and sent to users for the following:

<table>
<thead>
<tr>
<th>Action</th>
<th>System generates email to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor/payroll coordinator adjusts an employee’s prior period timesheet</td>
<td>Employee</td>
</tr>
<tr>
<td>Employee requests leave</td>
<td>Employee’s supervisor</td>
</tr>
<tr>
<td>Supervisor approves/denies leave request</td>
<td>Employee</td>
</tr>
<tr>
<td>Supervisor/payroll coordinator changes employee’s completed timesheet</td>
<td>Employee</td>
</tr>
<tr>
<td>FMLA request initiated/approved/denied</td>
<td>Employee</td>
</tr>
<tr>
<td>FMLA time charged outside of event</td>
<td>Employee and Supervisor</td>
</tr>
<tr>
<td>Employee low leave balance</td>
<td>Employee and Supervisor</td>
</tr>
<tr>
<td>Reminder to review leave requests</td>
<td>Employee and Supervisor</td>
</tr>
</tbody>
</table>

**NOTE:** Emails to the user regarding TAL notifications and updates will come from [EcotimeAlert@hbscorp.com](mailto:EcotimeAlert@hbscorp.com).
10 History

The system allows the user to review timesheets that have been sent to Payroll Services. These timesheets are from previous periods and are now in a history file.

To review a history timesheet, click on the History tab and then Timesheet. The TAL system will display a list of prior pay periods that have been moved to history. Find your prior pay period and click go. The TAL system will display your prior pay period timesheet.

NOTE: History timesheets are read only and no changes can be made by the employee. If changes need to be made, contact your supervisor or payroll coordinator as soon as possible.

11 ACA Tracking

The Affordable Care Act requires that hours must be tracked and reported for employees that do not qualify for full benefits; consequently, we must track hours for FLSA Exempt (Salaried) employees that are less than .75 FTE.

There are several options for the employee, supervisor, or payroll coordinator to enter hours:

1. Use the “Duration Timesheet” shown below to track actual hours. Enter the total hours worked, not the start and end times. This timesheet is automatically available for all exempt employees who are less than .75 FTE.

2. An Adjunct Professor or Graduate Teaching Assistant who is the instructor of record can use the Safe Harbor formula.

   • Hours will be credited using a safe harbor model. The safe harbor is 2.25 hours credit for each credit hour, plus additional hours required for office hours, meetings, or other required work events. For example, a 3 credit hour class which requires 2 office hours per week would be calculated as follows: 2.25 * 3 + 2 = 8.75 per week. Other reasonable methods may be used to credit hours.
3. Graduate Assistants can enter the hours as listed in their employment agreement. If they are a .5 FTE they can enter 4 hours per day, .7 FTE can list 5.6 hours per day and so forth.

4. If an employee fails to record hours accurately, the supervisor or payroll coordinator must enter the correct hours.
   - If a person worked on a given day, but the number of hours is not known, 8 hours must be entered for that day.
   - If a person worked during a given week, but the days worked are not known, 40 hours must be entered for the week.
   - If an employee consistently fails to enter hours, 40 hours must be entered for every week causing the person to be a 1.0 FTE with full-time eligibility.

The duration timesheet for exempt employees that are less than .75 FTE is shown below.

The drop menus in the bottom box list the different types of hours worked and leave taken that can be put on the timesheet.
Employees or the supervisor or payroll coordinator must use **Regular ACA** to record hours worked for the purposes of ACA reporting. These hours do **not** affect pay (will not carry forward to payroll) and are recorded for the purposes of ACA compliance. All other items in the menu are forms of leave that should be used as defined and do affect pay.

An employee in one of the ACA Tracking categories above, that worked 8 hours on Tuesday, would choose “Regular ACA” under **Hours Type** and enter an 8 in the Tuesday column, as shown in Week 1 above.

Click ![image] and repeat for the remainder of the pay period. Duration timesheets must be completed by the employee and approved by the supervisor at the end of each pay period.

**NOTE – SHIFT WARNING:** If the number of hours in a given day does not match the per day FTE value, a warning will appear. You do not need to correct this warning if the hours are accurate. The system is just showing that the person worked more or less than expected per day. For instance, the system assumes that a .5 FTE employee working 20 hours per week would work 4 hours per day, 5 days per week; however, a person working 10 hours per day, 2 days per week is acceptable. The warning will not prevent the payroll process from running.

**NOTE:** Multiple types of leave can be entered on the same week by using the other rows under **Hours Type**, as shown in the image below.

![Image of timesheet]

**Part Time Exempt Employees and LWOP**

If a part-time exempt employee only works part of their scheduled hours for a day and has no available leave, they cannot use **leave without pay (LWOP)** hours for the hours not worked. However, if the employee does not work any hours of a scheduled work day, then LWOP may be used on the timesheet. The amount of LWOP entered should match the number of hours the employee was scheduled to work.
## Contact Information

<table>
<thead>
<tr>
<th>Issue/Question</th>
<th>Who to Contact</th>
<th>Phone/Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>FMLA Issues/Questions</td>
<td>Human Resources</td>
<td>(405) 271-2180 ext. 44702</td>
</tr>
<tr>
<td>TAL Issues/Questions</td>
<td>Payroll Services</td>
<td>(405) 271-2055 or <a href="mailto:payroll-services@ouhsc.edu">payroll-services@ouhsc.edu</a></td>
</tr>
<tr>
<td>Wall Clock Issues/Repairs</td>
<td>IT Service Desk</td>
<td>(405) 271-2203 or <a href="mailto:servicedesk@ouhsc.edu">servicedesk@ouhsc.edu</a></td>
</tr>
<tr>
<td>Wall Clock Orders</td>
<td>IT Service Desk</td>
<td>(405) 271-2203 or <a href="mailto:servicedesk@ouhsc.edu">servicedesk@ouhsc.edu</a></td>
</tr>
</tbody>
</table>