

# Time, Attendance and Leave (TAL) Training Guide For Supervisors and Payroll Coordinators

# Health Sciences Center

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### 1 Overview

The Time, Attendance and Leave (TAL) system establishes and communicates procedures to ensure employees' time and attendance are recorded properly, that the proper department and accounts are being charged, paid accurately and in a timely manner, and that the appropriate supervisors and payroll coordinators can approve and review the timesheets.

## 2 Supervisor's Responsibility

- 1. Access the TAL website often to check for messages and stay on top of manager tasks. (www.tal.ouhsc.edu).
- 2. Edit and correct timesheet entries. The supervisor is required to correct time entries by certain dates/times, which are designated by the departmental payroll coordinator. Refer to the payroll calendar for dates and deadlines.
- 3. Approve and review leave requests as received.
- 4. Submit prior pay period corrections as soon as known.
- 5. Enter/review/approve compensatory time elections for employees who request it.
- 6. Answer employee questions about the TAL system as well as possible before referring an employee to Payroll Services.
- 7. Timesheets approved by the supervisor will be reviewed by the payroll coordinator. The supervisor's review and approval of time entries on the timesheet in the TAL system will serve as his/her electronic signature.

### 3 Payroll Coordinator's Responsibility

- 1. Access the TAL website often to check for messages and stay on top of manager tasks. (www.tal.ouhsc.edu).
- 2. Communicate with supervisors to edit and correct timesheet entries as needed and review timesheet entries before payroll deadline. Refer to the payroll calendar for dates and deadlines.
- 3. Submit and/or approve prior pay period corrections as soon as known.
- 4. Answer employee questions about the TAL system as well as possible before referring an employee to Payroll Services.
- 5. The payroll coordinator is the final timesheet reviewer.



**Hourly employees** that do not have access to the TAL system (either because they do not have regular access to a computer or are not on the campus network) will be asked by their department to use a paper timesheet. The paper timesheet can be found on the TAL Resources page at <u>www.tal.ouhsc.edu</u> under Paper Timesheet (Hourly only).

**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) hours. The paper timesheet for tracking ACA hours can be found on the TAL Resources page at <u>www.tal.ouhsc.edu</u> under Paper Timesheet for ACA Hours Tracking.

**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. Temporary employees will be paid on the same bi-weekly cycle as all other University employees.

**The supervisor or Payroll Coordinator** must input all hours tracked on a paper timesheet in the TAL system. Follow the instructions for inputting time on behalf of an employee to do so. Note that the employee can sign off on their paper timesheet, but if they have access to a computer they can approve the timesheet in TAL after the supervisor/Payroll Coordinator inputs the time into the timesheet in TAL on their behalf. The paper timesheet should be attached in TAL to the relevant timesheet to document the time manually entered by the supervisor and/or payroll coordinator.

## 4 TAL Website General Navigation

4.1 Signing In
----------------

All employees who have access to a computer can sign into TAL using his/her OUHSC network ID and password.

Enter your OUHSC Network ID and Password, click Log On.

Ecotime					
Pl	ease enter your User ID and Password				
User ID:					
Password:					
	Log On				



#### 4.2 Menu Bar

A menu bar is located at the top of the screen. Each item on the top of the menu bar is a tab that allows you to perform particular functions. Clicking on a tab will open more options on second line.

The UNIVERSITY of OKLAHOMA	Employee Tasks	Manager Tasks	Messages	Employee	Setup	History	Repo	rts Log	Off Help	
Health Sciences Center	Employee Timesheets	s Employee Bal	ances TimeOff	Approvals	Delegate	Authority	On Call	Attendance	Find EE TS Grou	up

- 1. **Employee Tasks:** All employees (including those without supervisory duties) will have the Employee Tasks tab which is used to perform tasks in TAL impacting an employee's own timesheet, TimeOff requests, etc.
- 2. **Manager Tasks:** Supervisors or Payroll Coordinators will also have the Manager Tasks tab. The menu items that appear under the Manager Task tab impact the employees in that Supervisor/Payroll Coordinator's timesheet group(s).

**NOTE:** Timesheet Groups are a function of HR ORG + Supervisor Employee ID. Payroll Coordinators/Supervisors may have access to numerous Timesheet Groups.

#### 4.3 General Navigation: Buttons

The buttons in the toolbar give the user quick access to commands, procedures, and functions. The table below defines the actions/description of each button.

Icon	Action
	Save & Calculate – Saves and calculates the data on the timesheet.
*	Reset – Resets all changes.
	Approve Pay Period – To approve the current selected timesheet.
$\mathbf{\overline{S}}$	Unapprove Pay Period – To unapproved the current selected timesheet.
	Notes – View, add and edit notes.

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Y	Health	Sciences	Center

1	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
	Calculate Timesheet – Calculates any balance adjustments that may apply. Shows how time entered will cascade.
(III)	Balances – Displays current leave balances up to the present day.
2	Timesheet Audit – Shows all changes made to the selected timesheet.
۵	On Call – Add on call schedule assignment.
	Return – Returns to previous screen or selection.
0	Print – Prints the timesheet.
R	Unapprove All – Unapprove all items.
	Approve All – Approve all items.

# 5 Supervisor & Payroll Coordinator Tasks

### **Definitions of Tabs on Manager Menu Bar:**

Tab	Tasks
Employee Tasks	See Employee TAL Manual for more information.
Manager Tasks	Employee Timesheets, Employee Balances, Time Off Approvals,
	Delegate Authority, FMLA Request, On Call, Attendance, and Find
	Employee Timesheet Group.
Messages	Welcome screen with any messages for the user.
Employee Setup	Comp. Effective Dates and Payouts
History	Allows the user to review timesheets and timesheet group history that
	have been approved and paid.
Reports	Allows the user to review employee info, output and timesheet
	reports
Log Off	Allows the user to log off the system when finished
Help	Link to the TAL website for information



5.1 Employee Timesheets

#### Viewing Employee Timesheets

The employee timesheets section allows the user to view, approve and unapprove the timesheets of all employees in a Timesheet Group for a selected pay period.

**NOTE:** Make sure the employees have marked their timesheets as completed before approving as a supervisor. Employees that have not approved their timesheet by the end of the pay period need to be reminded by the supervisor, unless the employee only has access to the wall clocks. Employees with access to the wall clocks only should be given the opportunity to review their time prior to the supervisor approving the employee's time in TAL.

1. Choose **"Primary" as the Timesheet Group** see all employees you are the primary supervisor or payroll coordinator for.

Timesheet Group: Primary 

Period 02/17/2019 - 03/02/2019 B1 

Period 02/17/2019 - 03/02/2019 B1 

Period 02/17/2019 - 03/02/2019 B1 
Period 02/17/2019 - 03/02/2019 B1 
Period 02/17/2019 - 03/02/2019 B1 
Period 02/17/2019 - 03/02/2019 B1 
Period 02/17/2019 - 03/02/2019 B1 
Period 02/17/2019 - 03/02/2019 B1 
Period 02/17/2019 - 03/02/2019 B1 
Period 02/17/2019 - 03/02/2019 B1 
Period 02/17/2019 - 03/02/2019 B1 
Period 02/17/2019 - 03/02/2019 B1 
Period 02/17/2019 - 03/02/2019 B1 
Period 02/17/2019 - 03/02/2019 B1 
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2. Choose a **specific Timesheet Group** from the display bar by selecting the **Manager Tasks** tab and then click on the **Employee Timesheets** tab.

Timesheet Group: \*ADM001-T\* - Processed PP-Full Access 🗸 🛛 Pay Period: 02/22/2015 - 03/07/2015 B1 🧹 👔

3. A **Timesheet Statistics** summary will show on your screen after you search by Primary or a specific Timesheet Group. This is an interactive chart. You can click on any red heading to go to the list of applicable individuals. For example, in the printscreen below, there is one person with an Attachment. If you click on the word Attachment, the list results will show that person and you can click to see the timesheet.

			Timesheet Stat	istic	8		Hie
Completion			Total Timeshee	ets 7	9		Approval
	Approved	0	Not Approved	79	Completed	0	
	Not Completed	79	Validation Errors	1	Validation Warnings	0	
Not	Notes	0	Addl Hours	0	Attachments	1	
Completed 100%	Attachments	1					Not Approved

4. To view employee summary, select appropriate Timesheet Group and pay period for review and click the button to bring up the following screen:

				Hours Sumr	mary for 02/17	7/2019 - 03/0	2/2019 - B1					
	Timesheet Group	Employee Name	Regular	Exception	Total Hours	Addl Hours	Complete	Notes	Attachments	# Messages	Approved	Action
	Timesheet Group Full Access	Employee Name Exempt/Salary/B1										
	Timesheet Group Full Access	Employee Name Exempt/Salary/B1										
	Timesheet Group Full Access	Employee Name Exempt/Salary/B1										
	Timesheet Group Full Access	Employee Name NonExempt/Hourly/B1										
	Timesheet Group Full Access	Employee Name NonExempt/Hourly/B1										
	Timesheet Group Full Access	Employee Name Exempt/Salary/B1										
	Press the button to the right to approve/unapprove all checked items							Submit				

5. Use the **Previous Page** and **Next Page** buttons to scroll through the Hours Summary pages for employees in the Timesheet Group. To search for a specific employee, click on any employee's name in the Hours Summary page, or use the Last Name search bar to find the specific employee needed.

Last Name:	GO	[<< Previous Page]	Page 4 of 4	[Next Page >>]	

6. To review an employee's timesheet, click on the employee's name.

#### 7. Approving Timesheets:

- a. Click the Approve icon while viewing the employees timesheet, OR
- b. Click  $\square$  Approve and submit on the employee summary screen, OR
- c. After reviewing all timesheets for accuracy, click the Approve All icon 🕼 from the employee summary screen

#### 8. Unapproving Timesheets:

- a. Click the Unapprove icon 😡, OR
- b. Click UnApprove and submit on the employee summary screen.

**NOTE**: While viewing and employees timesheet, to return to the Hours Summary page after approving an employee's timesheet, click the Return to TS Group icon (D). Do not use the browser's back button.



#### **NOTE FOR SUPERVISORS:**

- Employees that are not able to complete their timesheet in TAL will still get paid.
- The exception is, all hourly employees will only get paid for the hours recorded on the timesheet at the time it was approved. If there are no hours recorded, then no hours will be paid.
- All salary employees will get paid at their salary rate.
- Supervisors should always remind employees to complete their timesheet.
- Supervisors should also review and approve all employee timesheets regardless if they have been completed by the employee.
- Supervisors need to make sure to check all their Timesheet Groups to see the full list of employees.

#### NOTE FOR PAYROLL COORDINATOR:

- The Payroll Coordinators responsibility is to ensure employees and supervisors are completing and approving timesheets as well as addressing any errors/warnings on timesheets.
- If an employee has not completed his/her timesheet and the supervisor approved it, the payroll coordinator does not need to take further action.
- Payroll Coordinators need to make sure to check all their Timesheet Groups to see the full list of employees.

Data Field	Definition
Employee Name	Displays employee name and FLSA status (i.e., exempt/salaried vs.
	nonexempt/hourly).
Regular	Displays the number of regular hours worked.
Exception	Displays the number of exception hours entered. Paid Time Off
	(PTO), Extended Sick Leave (ESL), jury duty, military leave,
	Family and Medical Leave Act leave (FMLA), administrative leave,
	etc.
Total Hours	Displays the total hours that the employee entered (regular plus
	exception time).
Addl Hours	Displays the number of additional/overtime hours calculated.
Complete	A blue check mark in the column indicates that the employee's
	timesheet is complete and ready to be approved by the supervisor.
Notes	A blue check mark in the Notes column indicates that a note has
	been attached to the timesheet.
Attachments	Lists number of attachments on timesheets
# Messages	Displays the number of errors and warnings. Normally, a timesheet
	cannot be approved until the errors are corrected. Warnings will not
	prevent a timesheet from being approved. Please review all
	errors/warnings prior to approving timesheet.

#### **Hours Summary Screen Definitions:**



Data Field	Definition
Approved	A blue check mark in the column means that this employee's
	timesheet has been reviewed and marked approved by the
	supervisor.
Action	Displays either the <b>approve</b> or <b>unapprove</b> checkbox based on
	available action.

#### List of Warnings

Warning Flag	Description
1	FMLA Exceed Planned Hours
С	Paid Leave Shift > Shift
G	Hours/Day > 12
Н	Hours/Week > 70
J	Invalid Holiday
K	< Hours/Week
0	Insufficient PTO
Р	Insufficient Sick
Q	Insufficient Vacation
R	Insufficient ESL
S	Insufficient Comp

#### List of Errors

Error Flag	Definition
2	FMLA Exceed Yearly Hours
3	FMLA Outside of Interval
6	Activity Required
В	Time In = Time Out
D	Employee Not Active
Е	Employee Not Found
F	> 24 Hours/Day
Ι	Notes Required
Μ	Hours Before Hire Date

#### **Editing an Exempt Employee's Timesheet**

Exempt employees are allowed to review and edit their own timesheet. Employees will receive an email and a notification in TAL if the supervisor edits a timesheet that has already been completed by the employee. The employee will have to complete their timesheet again and re-route it to the supervisor for approval again.



1. From the Hours Summary page under **Employee Timesheets**, select an employee by clicking on the name.

			Hours Sumr	mary for 02/1	7/2019 - 03/0	2/2019 - B1									
Timesheet Group	Employee Name	Regular	Exception	Total Hours	Addl Hours	Complete	Notes	Attachments	# Messages	Approved	Action				
Timesheet Group Full Access	Employee Name Exempt/Salary/B1														
Timesheet Group Full Access	Employee Name Exempt/Salary/B1										Approve				
Timesheet Group Full Access	Employee Name Exempt/Salary/B1														
Timesheet Group Full Access	Employee Name NonExempt/Hourly/B1										Approve				
Timesheet Group Full Access	Employee Name NonExempt/Hourly/B1										Approve				
Timesheet Group Full Access	Employee Name Exempt/Salary/B1										Approve				
	Press	the button	to the right	to approve/ur	approve all c	hecked item	15				Submit				

The system will display the employee's detailed timesheet:

	Show Pay Period Details																
	Timesheet Summary															<u>Hide</u>	
Hours	Sun 02/17	Mon 02/18	Tue 02/19	Wed 02/20	Thu 02/21	Fri 02/22	Sat 02/23	Week Total	Sun 02/24	Mon 02/25	Tue 02/26	Wed 02/27	Thu 02/28	Fri 03/01	Sat 03/02	Week Total	Total
Worked								0.00								0.00	0.00
Exceptions								0.00								0.00	0.00
Totals:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

			Week 1: Hours →										
Hours Type	Message	Sun 02/17	Mon 02/18	Tue 02/19	Wed 02/20	Thu 02/21	Fri 02/22	Sat 02/23		Total			
Leave Taken Scheduled 🗸					8.00					8.00			
<select hours="" type=""> 🗸</select>										0.00			
<select hours="" type=""> 🗸</select>										0.00			
<select hours="" type=""> 🗸</select>										0.00			
Totals:	0.00	0.00	0.00	8.00	0.00	0.00	0.00		8.00				

- 2. Make the appropriate changes.
- 3. To save the changes, click on the





#### **Editing an Hourly Employees Timesheet**

1. From the Hours Summary page under **Employee Timesheets**, select an hourly employee by clicking on the name.

	Hours Summary for 02/17/2019 - 03/02/2019 - B1														
Timesheet Group	Employee Name	Regular	Exception	Total Hours	Addl Hours	Complete	Notes	Attachments	# Messages	Approved	Action				
Timesheet Group Full Access	Employee Name Exempt/Salary/B1														
Timesheet Group Full Access	Employee Name Exempt/Salary/B1														
Timesheet Group Full Access	Employee Name Exempt/Salary/B1														
Timesheet Group Full Access	Employee Name NonExempt/Hourly/B1														
Timesheet Group Full Access	Employee Name NonExempt/Hourly/B1														
Timesheet Group Full Access	Employee Name Exempt/Salary/B1														
	Press	the button	to the right	to approve/ur	approve all c	hecked item	15				Submit				

The system will display the employee's detailed timesheet.

							Show P	ay Perio	d Detai	ls							
	Timesheet Summary															<u>Hide</u>	
Hours	<u>Sun</u> 02/17	<u>Mon</u> 02/18	<u>Tue</u> 02/19	<u>Wed</u> 02/20	<u>Thu</u> 02/21	<u>Fri</u> 02/22	<u>Sat</u> 02/23	Week Total	<u>Sun</u> 02/24	<u>Mon</u> 02/25	<u>Tue</u> 02/26	<u>Wed</u> 02/27		<u>Fri</u> 03/01	<u>Sat</u> 03/02	Week Total	Total
Worked								0.00								0.00	0.00
Exceptions								0.00								0.00	0.00
Totals:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
							Comp	. Time E	lection								
Comp	0%	0%	0%	0%	0%	0%	0%		0%	0%	0%	0%	0%	0%	0%		

Worked H	Worked Hours on Wednesday 02/20/19													
Time In/Out	Overnight	Hours	Minutes	Hours Type	Message									
Time In:         ~         ~         ~           Time Out:         ~         ~         ~         ~		0	00	< Select Hours Type > 🗸										
Time In:         ~         ~         ~           Time Out:         ~         ~         ~         ~		0	00	< Select Hours Type > 🗸										
Time In:         ~         ~         ~           Time Out:         ~         ~         ~         ~		0	00	< Select Hours Type > 🗸										
Time In:         ~         ~         ~           Time Out:         ~         ~         ~         ~		0	00	< Select Hours Type > 🗸										
	Total:	0	0											

2. On the employee's Pay Period Summary, **click the date on which the employee had exception time** (see yellow highlight 2/20 in printscreen above). The data on the **Hours Worked** table will change according to the date selected.

3. Click the **Show Exceptions** button on the **Hours Worked** table. The system will then display this table:

Please Enter Exception Hours Taken, If Any:

	Exce	eption Time Wednesday 02/20/19	
Hours	Minutes	Hours Type	Message
		<select type=""> 🗸</select>	
~		<select type=""> 🗸</select>	
		<select type=""> 🗸</select>	
~		<select type=""> 🗸</select>	

4. Add the Hours and Minutes and select the exception time from the list in the drop down under **Hours Type**. To save the changes, click on the button.

#### Correcting an employee's time punch

If an hourly employee forgets to clock in/out, makes a time punch mistake, or is working from a different location, the supervisor is able to correct the employee's time punch in the TAL system.

**Hourly employees need to notify supervisors when corrections are needed**; and it is recommended that the supervisor corrects time punches on the next business day. Supervisors can also review employee timesheets and the **Attendance** screen to see when an employee missed a punch. For all punch exceptions, request an employee complete a paper timesheet and attach it to the relevant timesheet in TAL.

1. From the Hours Summary page under **Employee Timesheets**, select an hourly employee by clicking on the name.

Hours Summary for 02/17/2019 - 03/02/2019 - B1														
Timesheet Group	Employee Name	Regular	Exception	Total Hours	Addl Hours	Complete	Notes	Attachments	# Messages	Approved	Action			
Timesheet Group Full Access	Employee Name Exempt/Salary/B1													
Timesheet Group Full Access	Employee Name Exempt/Salary/B1													
Timesheet Group Full Access	Employee Name Exempt/Salary/B1													
Timesheet Group Full Access	Employee Name NonExempt/Hourly/B1													
Timesheet Group Full Access	Employee Name NonExempt/Hourly/B1													
Timesheet Group Full Access	Employee Name Exempt/Salary/B1													
	Press	the button	to the right	to approve/ur	approve all c	hecked item	15				Submit			

2. The system will display the employee's timesheet. If there is an error on the timesheet, there will be a warning/error icon Pnext to the day on which the employee had an incorrect time punch.

	Timesheet Summary															<u>Hide</u>	
Hours	<u>Sun</u> 03/17				<u>Thu</u> 03/21	<u>Fri</u> 03/22		Week Total						<u>Fri</u> 03/29	<u>Sat</u> 03/30	Week Total	Total
Worked					16.00			16.00								0.00	16.00

3. Click on the day you need to edit. Below the timesheet is the Worked Hours section for that date.

Wo	rked Hours o	on Thursd	ay 03/21/1	9	Show Exc	ceptions
Time In/Out	Overnight	Hours	Minutes	Hours Type	Message	Delete
Time In:         4         15         P.M.            Time Out:         8         15         A.M.		16	00	< Select Hours Type > 🗸	C,G	
Time In:         ~         ~         ~           Time Out:         ~         ~         ~         ~		0	00	< Select Hours Type > V		
Time In:         ~         ~         ~           Time Out:         ~         ~         ~         ~		0	00	< Select Hours Type > 🗸		
Time In:         V         V           Time Out:         V         V		0	00	< Select Hours Type > v		
Time In:         V         V           Time Out:         V         V         V		0	00	< Select Hours Type > v		
	Total:	16	00	Press the button to the right to delete	checked items	Delete
		Mes	sage Des	criptions		
C - Worked & Paid Leave > Shift (Warnin G - Hours/Day > 12 (Warning)	g)					

- 4. Correct employee's time by changing the **Time In:** and **Time Out**: fields. The system defaults the Hours Type to Regular. *If you are correcting time when an employee was called in, remember to change the Hours Type to Call Back Entry.* If you need to delete an entry, check the box in the Delete column and click the Delete button below.
- 5. To save the changes, click on the Save button. The system will show the employees updated timesheet and the error will be removed.

#### Editing a Timesheet from a Prior Pay Period:

• To edit a timesheet from a prior period, please see section 5.9.

#### **Rounding Rules:**

• The TAL system is setup to utilize the **University policy for rounding rules**. This applies to time recorded on the web clock and the wall clock. See University policy located at <a href="http://www.ouhsc.edu/policy/#300">http://www.ouhsc.edu/policy/#300</a> for more detailed information.



• If a supervisor corrects a punch, they must correct the rounding for the time that was accurately clocked. For example, if an employee clocked in at 7:36am and forgot to clock out for lunch, the supervisor must correct the missed clock out and also adjust the clock in to show 7:30am so that it is in quarter hours.

#### 5.2 Overtime and Compensatory Time

#### **Overtime Compensation**

The Staff Handbook states that overtime compensation is the standard for hourly employees working over 40 hours per work week (unless FLSA guidelines state otherwise, such as Law Enforcement guidelines). Overtime rules and calculations were setup in the TAL system following FLSA guidelines. The OUHSC Staff handbook states that all OT must be approved in advance. If an employee accrues overtime without prior approval, it must be paid but employee can be disciplined for not receiving approval. If you need assistance with this process, please contact your department's HR Business Partner.

#### Changing employees from Overtime to Compensatory (Comp Time)

Employees who wish to accrue comp time instead of overtime will need to complete an overtime election form (found on <u>http://tal.ouhsc.edu</u>). This is optional for employees and cannot be required by a department. The supervisor must change the employees OT status in TAL by following the steps below.

1. Click on the Comp. Effective Dates tab located on the Employee Setup tab.



2. **Search** by Employee Name or Employee ID and select **Retrieve Data**. Select the hyperlink on the employee ID Number.

Employee Name      Employee ID	To search for Comp.Effective Dates information please set criteria and click	Retrieve Data
	Employee Name      Employee ID	

3. Click on the employee's ID number to select the employee.

	Comp.Effective D	ates Records
Number	Employee Name	Current Comp Election(s)
<b>EMPID</b>	Last, First	



4. Click the Category drop down and choose Comp – CMP



5. When the Comp Elections screen displays, click Add New and enter the relevant Start and End Dates. Elections can be for a temporary date range or permanently. The system requires an End Date so for long term selections, choose a date years in the future. Comp Percent must be set to 100%. Select Save to save the record.

C	ategory: Comp - CMP ▼	]
Comp Elections - Comp - CM	Р	Add New
	Employees Comp Elections	
Start Date	End Date	Comp Percent
03/22/2019	12/31/2030	100%

6. Your saved data will display.

1	Comp Electior	ıs - Comp - C	MP			<u>A</u> (	dd New
	Category	Start Date	End Date	Comp Percent	Entered By	Date Entered	Action
	Comp - CMP	03/22/2019	12/31/2030	100%	Last, First	03/22/2019 11:01:38 AM	<u>Edit</u> Delete

5.3 Employee Balances

#### **Employee Balances and Cascading**

Supervisors and Payroll Coordinators can view employee balances to include PTO, Vacation, Sick, ESL, Comp Time, and Holiday. When exception time is used, the TAL system cascades leave balances automatically on employee timesheets. The system will first check to see if an employee has any hours banked in the Holiday balance. If available, the system will use banked holiday balances 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.





#### **Viewing Employee Balances**

1. Click **Employee Balances** under **Manager Tasks**. Choose the relevant Timesheet Group and click go.

The UNIVERSITY of OKLAHOMA	Employee Tasks	Manager Tasks	Messages	Employe	e Setup	History	Repo	rts Log Of	f Help
Health Sciences Center	Employee Timesheets	Employee Bal	ances TimeOff	Approvals	Delegate /	Authority	On Call	Attendance	Find EE TS Group
Timesheet Group:	۲	<b>90</b>							

2. Employees are displayed one at a time. Use the arrows to scroll through the employees or the Search box to search for an employee.

3. The TAL system displays an employee's future approved leave requests and accrual balances by category.

Please select a date to calculate balances:										
Future A	Approved Lea	ve Reques	ts ( Calcu	lated to	3/30/2019)					
Category Hours Approved										
Leave C	ascading				0.00					
	Accrual Bala	nces ( Calc	ulated to	3/30/201	9)					
Category	Startin	g Balance	Earned	Taken	Current Balance					
PTO		122.00	974.40	829.25	267.15					
ESL		0.00	0.00	0.00	0.00					
Holiday		0.00	344.00	344.00	0.00					

#### **Balance Screen:**

Column	Definition
Category	Type of leave.
Starting Balance	Beginning balance for the period.
Earned	Amount of leave earned during the employees employment time.
Taken	Amount of time employee has used or was paid for, which has not
	been previously deducted from the starting balance.
Current Balance	Current amount for the period to which the employee is entitled. This
	would reflect the starting balance + leave earned – leave taken.
Approved Leave	Leave that has been approved by supervisor but has not yet
Balance	processed on the timesheet.



#### Viewing Employee's Balance Details

This allows the user to view balance details of the employee's leave that were used or are remaining. To view employee balance details follow the steps below:

1. Click on the **leave type** in the **Category** column. The system will expand that category to show the details. The transactions are sorted descending.

		Accrual Balances ( Calculated to 3/30/2019)														
2	Category		St	arting E	Balance		Earned	Taken	Current	Balance						
١	PTO				0.00	)	515.22	478.25		36.97						
	Date	Descript	ion	Hours	Totals	S	ource									
	02/13/2019	Paid Lea	ve	-8.00	36.97	С	ascaded t	o Leave T	Faken Sche	duled						
	02/12/2019	Paid Lea	ve	-8.00	44.97	С	ascaded t	o Leave T	Faken Sche	duled						
	02/03/2019	Earned		8.31	52.97	E	intitlement									
	01/20/2019	Earned		8.31	44.66	E	intitlement									
	01/14/2019	Paid Lea	ve	-7.00	36.35	С	ascaded t	o Leave T	Faken Unsc	heduled						

2. To return to the summary screen click the leave type again and the system will collapse the detail.

#### **Accruals**

Accruals are run after every pay period or annually based on the accrual type. The <u>Leave</u> <u>Accrual for Health Sciences Center Programs</u> on the HR website indicates how regular benefit eligible employees accrue leave. Postdoctoral Research Fellows and/or Residents, please see the 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 <u>after</u> a period. Leave is available for use as soon as it is posted to the balance tables.

Supervisors and Payroll Coordinators need to ensure leave is correctly calculating for employees especially in the following situations:

- 1. <u>Employees change positions</u> if changing FTE or moving from a benefits eligible position to a non-benefits eligible position, etc.
- 2. <u>New hire employees</u> verify the ePaf was executed in time for the employee to be added to TAL and properly accrue for the period.
- 3. <u>Terminated employees</u> verify the termination ePaf was processed timely and the employee did not continue to accrue leave after terminated.

If any adjustments need to be made to an employees leave balance due to one of the scenarios above, and it is not related to an adjustment that needs to be made as prior period adjustment in TAL, then you will need to submit a Leave Adjustment form located on the Payroll Services website.



#### 5.4 Leave Requests

When a supervisor or payroll coordinator logs in, the TAL system will always display the **Messages** tab automatically. If an employee has requested leave, the supervisor will see a message listing the leave request awaiting their approval. The message will disappear when the leave request is approved/denied. Supervisors will also receive emails regarding leave requests, note that the emails may be delayed up to one hour from time of submission.

#### **Reviewing Leave Requests:**

1. Navigate to Manager Tasks, then click TimeOff Approvals.



2. Select the **Timesheet Group** using the dropdown menu and click 2 as shown below:

Timesheet Group: \*ADM001-T\* - Full Access 🗸 👔

The following screen will be displayed which lists all requests and status.

					Request Type:	All	T		
				1	Time Off Requests	from 02/28/2019 1	o 07/01/2020		
Request Type	From/To	Total Days	Total Hours	Reason Code Type	Employee Notes	Manager Notes	Review Status	Process Status	Action
Employe	e Name View Employee's B	alances	1						
Regular	<u>09/05/2019 - 09/05/2019</u>	1	8.00	Leave Taken Scheduled			Approved on 28 Jan 2019 1:13PM Central Time	Pending	Deny Pend
Employe	e Name <u>View Employ</u>	ee's Ba	lances						
Regular	07/25/2019 - 08/01/2019	6	48.00	Leave Taken Scheduled			Approved on 21 Dec 2018 3:53PM Central Time	Pending	Deny Pend
Employe	e Name <u>View Employee</u>	's Balar	nces						
Regular	11/18/2019 - 11/22/2019	5	40.00	Leave Taken Scheduled			Approved on 28 Jan 2019 1:13PM Central Time	Pending	Deny Pend
Employe	e Name View Employee's Ba	lances							
Regular	03/29/2019 - 03/29/2019	1	8.00	Leave Taken Scheduled			Pending on 14 Mar 2019 4:43PM Central Time	Pending	Approve
Press the	button to the right to approve/ur	napprov	e all che	cked items					Submit

- 3. Clicking on the **View Employee Balances** hyperlink will show you the employees current leave balances.
- 4. Clicking on the **date hyperlink** for a pending request will display the following screen:

	H	terror outer romany freeded outer romany								
	Week	Week Sunday Monday Tuesday Wednesday Thursday Friday Saturday								
	Leave Taken Scheduled									
	08/04/2019 - 08/10/2019						8.00			
	08/11/2019 - 08/17/2019		8.00	8.00	8.00					
	Total Days:	4		Total Hou	rs:	32.00				
				Notes						
1									2	
Employee Name				Notes						Entered On
Employee Name										1/7/2019 1:59:37 PM
		Submi	Re	turn to Ti	mesheet Gro	oup				

5. To approve or deny a request, you must be on the main department view screen.

Return to Timesheet Group

Click to return to the main Time Off Request page. See Approving/Denying the Leave Request sections below.

**NOTE:** Time Off Requests remain on the **TimeOff Approvals** tab for one rolling month after they are processed on the timesheet, even after they are approved or denied. To see a summary of TimeOff Approvals for multiple employees on dates use the calendar feature shown below.

#### Using the Calendar Function in TimeOff Approvals

A calendar will appear in the lower left screen when reviewing leave requests. Dates in blue represent days when other employees in that Timesheet Group have requested leave. Supervisors and Payroll Coordinators can use this to find how many other employees are already scheduled to be off those dates.

<u>&lt;&lt;</u>		Mar	ch 201	9		≫
Sun	Mon	Tue	Wed	Thu	Fri	Sat
24	25	26	27	28	1	2
3	4	5	<u>6</u>	Z	<u>8</u>	<u>9</u>
<u>10</u>	<u>11</u>	<u>12</u>	<u>13</u>	<u>14</u>	<u>15</u>	<u>16</u>
<u>17</u>	<u>18</u>	<u>19</u>	<u>20</u>	<u>21</u>	<u>22</u>	<u>23</u>
<u>24</u>	<u>25</u>	<u>26</u>	<u>27</u>	<u>28</u>	<u>29</u>	<u>30</u>
<u>31</u>	1	2	3	4	5	6

Clicking on the dates in blue to show the name(s) of the employee(s) who have requested leave for that time period and will show Leave Cascading (LC), the number of hours by day, and either Approved (A), Pending (P), or Denied (D).

		Weekly Vie	ew 03/17/2019	9 - 03/23/2019			
Employee	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Employee Name					LC 8.00 (A)	LC 8.00 (A)	
Employee Name		LC 8.00 (A)	LC 8.00 (A)	LC 8.00 (A)	LC 8.00 (A)	LC 8.00 (A)	
Employee Name		LC 8.00 (A)	LC 8.00 (A)	LC 8.00 (A)			



#### **Responding to Leave Requests**

1. If you need to respond to the request before approving/denying the request, select the employee leave request awaiting review. The following screen will display.

	R	Review Sta	atus: Pend	ling Pro	cess Status: F	Pending					
			Time O	ff Request	Details						
	Week	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday			
	Leave Taken Scheduled			,							
	08/04/2019 - 08/10/2019						8.00				
	08/11/2019 - 08/17/2019		8.00	8.00	8.00						
	Total Days:	4		Total Hou	rs:	32.00					
				Notes					-		
Employee Name				Notes					<u>.</u>	Entered On	
Employee Name										1/7/2019 1:59:37 PM	
		Submi	t Re	turn to Ti	mesheet Gr	oup					
2. Enter your com	ment, question,	etc i	in the	e No	tes bo	x and	cli	ck 🛛	Submit		

3. When complete Return to Timesheet Group

**NOTE:** All Notes on timesheets are **permanent** and **cannot be removed**. Ensure the information you are entering is necessary, not confidential, and needs to be noted in the system (instead of communicating outside of TAL such as email).

#### **Approving/Denying a Leave Request:**

Employe	e Name <u>View Employee's Ba</u>	ances						
Regular	03/29/2019 - 03/29/2019	1	8.00	Leave Taken Scheduled		Pending on 14 Mar 2019 4:43PM Central Time	Pending	Approve
Press the	button to the right to approve/ur	approv	e all che	cked items				Submit

- 1. Check the box next to **Approve** or **Deny** in the action column.
- 2. Click on the **Submit** button.
- 3. The status will update to show the request has been approved/denied. The employee will receive an email and a notification on the TAL Messages screen. This leave will populate on the employee's timesheet for the corresponding pay period.

**NOTE**: An employee cannot edit a leave request once approved or denied. In addition, **an employee cannot submit a new leave request if the date overlaps with any previous approved or denied request**. The Supervisor or Payroll Coordinator must change the previous request to **Pend** status and the employee will have to edit the original request.



#### **Reversing a Leave Request Decision:**

					Request Type:	All	T					
				1	Time Off Requests	from 02/28/2019 1	o 07/01/2020					
Request Type	From/To	Total Days	Total Hours	Reason Code Type	Employee Notes	Manager Notes	Review Status	Process Status	Action			
Employe	e Name View Employee's Ba	alances										
Regular 🔯 09/05/2019 - 09/05/2019 1 8.00 Leave Taken Scheduled Approved on 28 Jan 2019 1:13PM Central Time Pending												
Press the button to the right to approve/unapprove all checked items												

- 1. Change the status of the request to Pending by checking the Action box for Pend in the Action column.
- 2. Click the Submit button.
- 3. The status will update to show the request is back to a pending status. The employee will receive an email and a notification on the TAL Messages screen. The employee will need to edit and re-submit the leave request to their supervisor to complete the action.

**NOTE**: An employee can only edit leave requests that are in a pending status. Leave requests for the current pay period are processed once the supervisor approves the request. After a request has been processed to the timesheet, the request cannot be updated. The edit to the leave time will need to be made on the employee's timesheet.

#### 5.5 Delegating Authority for Supervisors

Supervisors have the ability to delegate authority to either their direct supervisor or a colleague that reports to the same supervisor to review and approve leave requests and timesheets for the Supervior's direct reports. Supervisors should delegate authority for approving timesheets and leave requests to a person with a similar level of authority or higher.

Failure to monitor employee time reporting and leave in an appropriate manner can result in negative audit findings.

**NOTE:** Employees cannot delegate the completion of their own timesheet to another individual.

1. Click the Manger Tasks tab and then Delegate Authority.



2. Delegation is done per Timesheet Group. Choose the correct **Timesheet Group** and click

see all the available employees you can delegate authority to. See table below for definitions for each field.

	Delegate	Authority			
Give Authority To	For TS Group	Begins (mm/dd/yyyy)	Expires (mm/dd/yyyy)	Group Access Level	Action
Employee Name (TimeSheet Group - Supervisor)	ADM000-LastName-000000	03/22/2019 🔊	12/31/2099 🙇	Supervisor 🔻 🐋	Add Entry
(TimeSheet Group - Supervisor) (TimeSheet Group - Direct Report) (TimeSheet Group - Peer) (TimeSheet Group - Peer) (TimeSheet Group - Peer)					

Field	Description
Give Authority To	This field will show you a list of
	individuals that are in the selected
	Timesheet Group. This can be peers,
	supervisors, or direct reports.
For TS Group	This field is the selected Timesheet Group.
Begins (mm/dd/yyyy)	The system defaults to today's date. This
	date can be any date from today to any day
	in the future in which this delegation needs
	to be active.
Expires (mm/dd/yyyy)	The system defaults to 12/31/2099. This
	date can be any date in which this
	delegation needs to expire.
Group Access Level	This field is defaulted to <b>Supervisor</b> .
	Payroll Coordinator delegation is handled
	via a security form outside of the TAL
	system.
Action	Add Entry is used to Add the Delegated
	Authority to the Current Delegations table.

- 3. Choose the person from the drop down menu that you want to delegate to, enter the dates, select Supervisor Group Access Level.
- 4. Click on Add Entry to add your selection. This will then show Current Delegations on the Delegate Authority tab. If you need to remove the Current Delegations for any reason, you may click Delete.

**NOTE:** If the employee you wish to delegate to is not on the available list, you must complete the **Time**, **Attendance**, **and Leave (TAL) Security Changes** from located on the **Payroll Services Forms and Tools** website. When completing the form



#### 5.6 Delegating Authority for Payroll Coordinators

Delegating Authority to Payroll Coordinators is currently being handled outside the TAL system through the PS-Security team. Primary and Delegate Payroll Coordinator access is requested on the **Time, Attendance, and Leave (TAL) Security Changes** from located on the **Payroll Services Forms and Tools** website.

#### 5.7 On Call

This section includes information on how to put employee's On Call in the TAL system.

#### Initial Setup for On Call Availability

1. Navigate to the **On Call** section under the **Manager Tasks** on the menu.

 The UNIVERSITY of OKLAHOMA
 Employee Tasks
 Manager Tasks
 Messages
 Employee Setup
 History
 Reports
 Log Off
 Help

 Health Sciences Center
 Employee Timesheets
 Employee Balances
 TimeOff Approvals
 Delegate Authority
 On Call
 Attendance
 Find EE TS Group

2. Choose the relevant **Timesheet Group** and click Go. Choose the relevant employee by clicking on the **Employee Name**.



3. Complete the **On Call Schedule Assignment** section with the range of dates the On Call option needs to be made available to the employee. Click **Save**.

Last Name:       If C<       Frevious Employee       Employee 4 of 6       INext Employee >>>         Add On Call Schedule Assignment:         Condition:       From Date:       End Date:       Cost Center:       Time In:       Time Out:	neet Group: *ADM - Fu	ill Access 🗸 🗸	0	
Add On Call Schedule Assignment: Condition: From Date: End Date: Cost Center: Time In: Time Out:		Last Name:	[<< Previous Employee] Employee 4 of 6 [Next Employee >>]	
Add On Call Schedule Assignment: Condition: From Date: End Date: Cost Center: Time In: Time Out:				
Condition: From Date: End Date: Cost Center: Time In: Time Out:	Add On Call Schedule Assignment:			
LEvery Day 102/22/2019 103 102/20/2019 103 102/20/2019 103 10 10 10 10 10 10 10 10 10 10 10 10 10	Condition: From	Date:	End Date: Cost Center: Time In: Time Out:	- I

 You can verify the On Call Schedule Assignment worked by searching in the Employee On Call Schedule Assignment Search box for all schedules in the same date range.

Γ	Employee On Call Schedule Assignments Search:			
	Status:	Date From:	Date To:	
		03/17/2019	03/30/2019	Retrieve Data
		No data to di	splay	

#### Sample results will look like this:

		Friday 03/22/201	9 - Saturday 03/30/2019		
Date	Time In	Time Out	Title Code	Status	Delete Select All OUnselect All O
			Current		
Fri 03/22/2019	12:00 AM	12:00 AM	0	v	
Sat 03/23/2019	12:00 AM	12:00 AM	0	v	
Sun 03/24/2019	12:00 AM	12:00 AM	0	v	
Mon 03/25/2019	12:00 AM	12:00 AM	0	v	
Tue 03/26/2019	12:00 AM	12:00 AM	0	v	
Wed 03/27/2019	12:00 AM	12:00 AM	0	v	
Thu 03/28/2019	12:00 AM	12:00 AM	0	v	
Fri 03/29/2019	12:00 AM	12:00 AM	0	v	
Sat 03/30/2019	12:00 AM	12:00 AM	0	v	
		Status	Descriptions		
V - Valid on call assignment					

#### Turning on Timesheet On Call

1. Click the **Manger Tasks** tab and then **Employee Timesheets**. Find the employee under the correct **Timesheet Group** and choose the correct **Pay Period** by clicking go and selecting the employee.



2. On the employee's timesheet, you will put a check in the Pager box for each day the employee will remain On Call. Click This tells the TAL system that this employee is On Call for this specific time frame.

Last Updated 10/14/2019

# Health Sciences Center

							1	Show F	ay Peric	d Detai	Is							
							Pa	y Perio	d Sumn	nary								<u>Hide</u>
Hou	Pay Period Summary         Hit           Hours         Sun 05/17         Mon 05/18         Tue 05/18         Week 05/20         Thy 05/21         Fri 05/22         Sat 05/23         Week Total         Sun 05/25         Mon 05/26         Tue 05/26         Week 05/26         Mon 05/26         Tue 05/28         Week 05/29         Meek Total         Week Total         Week Total         Week Total         Week Total         Week 05/29         Mon 05/29         Tue 05/29         Week 05/29         Week Total         Week Total         Week Total         Week Total         Week Total         Week Total         Mon 0.00         Iue         Week 05/29         Mon 05/29         Mon 01         Mon 01															Total		
Worke	t								0.00								0.00	0.00
Except	ions								0.00								0.00	0.00
Totals:		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Pager		✓	✓	✓	✓	✓	<ul><li>✓</li></ul>	✓		✓	✓	✓	✓	✓	<ul><li>✓</li></ul>	<ul><li>✓</li></ul>		
								Comp	. Time E	lection	1							
Comp		0%	0%	0%	0%	0%	0%	0%		0%	0%	0%	0%	0%	0%	0%		
	Worked Hours on Tuesday 05/40/45 Show Evantions																	
	Worked Hours on Tuesday 05/19/15 Show Exceptions																	
	Time In/Out Overnight Hou											Hours Type Messa						
	Tim Time	e In: • Out:	<b>~</b>	~		<b>×</b>			0	0	0			~				
	Time Time	e In: • Out:	~ ~	~		× ×			0	0	0			~				
	Time Time	e In: • Out:	<b>~</b>	~		<b>&gt;</b>			0	0	0			~				
	Time Time	e In: e Out:	~	~		× ×			0	0	0			~				
							То	tal:	0	0	0							

						Show	Pay Per	iod Deta	ails								
					P	ay Peri	od Sum	mary									<u>Hide</u>
Hours	<u>Sun</u> 05/17	<u>Mon</u> 05/18	<u>Tue</u> 05/19	Wed 05/20	<u>Thu</u> 05/21	<u>Fri</u> 05/22	<u>Sat</u> 05/23	Week Total	<u>Sun</u> 05/24	<u>Mon</u> 05/25	<u>Tue</u> 05/26	<u>Wed</u> 05/27	<u>Thu</u> 05/28	<u>Fri</u> 05/29	<u>Sat</u> 05/30	Week Total	Tota
Worked								0.00								0.00	0.00
Exceptions								0.00								0.00	0.00
Totals:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Pager	<ul><li>✓</li></ul>	<ul><li>✓</li></ul>	✓	✓	✓	✓	✓		<ul><li>✓</li></ul>	<ul><li>✓</li></ul>	✓	✓	<ul><li>✓</li></ul>	✓	<ul><li>✓</li></ul>		
						Com	p. Time	Electio	n								
Comp	0%	0%	0%	0%	0%	0%	0%		0%	0%	0%	0%	0%	0%	0%		
						Р	aid Sun	nmary									
On Call Schedule (OC1)	1.00						1.00	2.00	1.00	2.00					1.00	4.00	6.00
						- T	OF /	10/45					C1	-			
	<b>T</b> :	- 1- (0-	•••	orkear	iours o	niues	uay us/	19/15	1		T		Snow	Exce	ptions		
	TIM				Overnight Hours			Minu	nutes nours type		•		wessag	e	-		
Time In:	~		+	~			0		00			~					
This out																	
Time In:			+			] [	0		00			~					
Time Out.																-	
Time In:			<u>-</u>  -			]  נ	0		00			~					
Time Out:	•			•												-	
Time In: Time Out:	~			~		] [	0		00			~					
					т	otal:	0		00								

**NOTE:** Notice in the screenshot above that the TAL system put the On Call Schedule (OC1) pay code for 1 hour on the weekends and 2 hours on the holiday.

Step 3 – Employee using In Call Bac	<mark>k on Wall C</mark> l	<mark>lock or Web</mark>	<mark>) Clock:</mark> When an
employee gets called back in, they will	use the Wall	Clock or th	e Web Clock. If an
employee uses the Web Clock, they wi	ll use the	Called In	button. If an employee
uses the Wall Clock, they will use the	IN Call Back	button.	

Show Pay Period Details																	
	Pay Period Summary															<u>Hide</u>	
Hours	<u>Sun</u> 05/17	<u>Mon</u> 05/18	<u>Tue</u> 05/19	<u>Wed</u> 05/20	<u>Thu</u> 05/21	<u>Fri</u> 05/22	<u>Sat</u> 05/23	Week Total	<u>Sun</u> 05/24	<u>Mon</u> 05/25	<u>Tue</u> 05/26	<u>Wed</u> 05/27	<u>Thu</u> 05/28	<u>Fri</u> 05/29	<u>Sat</u> 05/30	Week Total	Total
Worked			2.00					2.00								0.00	2.00
Exceptions								0.00								0.00	0.00
Totals:	0.00	0.00	2.00	0.00	0.00	0.00	0.00	2.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.00
Pager	<ul><li>✓</li></ul>	✓	✓	✓	✓	<ul><li>✓</li></ul>	✓		✓	<ul><li>✓</li></ul>	✓	✓	<ul><li>✓</li></ul>	✓	<ul><li>✓</li></ul>		
						Comp	). Time	Electio	n								
Comp	0%	0%	0%	0%	0%	0%	0%		0%	0%	0%	0%	0%	0%	0%		
Paid Summary																	
Call Back Worked (CBW)			2.00					2.00								0.00	2.00
On Call Schedule (OC1)	1.00						1.00	2.00	1.00	2.00					1.00	4.00	6.00

Wor	ked Hours o	n Tuesday	05/19/15		Show Exc	eptions
Time In/Out	Overnight	Hours	Minutes	Hours Type	Message	Delete
Time In:         8         ∨         00         ∨         P.M.         ∨           Time Out:         10         00         ∨         P.M.         ∨		2	00	Call Back Entry 🗸		
Time In:         V         V           Time Out:         V         V         V		0	00	~		
Time In:         V         V           Time Out:         V         V		0	00	<b>```</b>		
Time In:         V         V           Time Out:         V         V         V		0	00	~		
Time In:         V         V           Time Out:         V         V         V		0	00	<b>```</b>		
	Total:	2	00	Press the button to the right to delete	e checked items	Delete

The TAL system will then record these hours as Call Back Worked (CBW). **NOTE:** If a supervisor needs to add time for Call Back Worked (CBW) on the employee's timesheet, you will need to make sure the Hours Type is **Call Back Entry**.

#### 5.8 Bank 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.

The UNIVERSITY of OKLAHOMA Employee Tasks Messages History Log Off Help Health Sciences Center Timesheet Balances TimeOff Request FMLA Request

- 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.

	Hours Input Summary																
		Week 1								Week 2							
Hours Type	Sun 01/20	Mon 01/21	Tue 01/22	Wed 01/23	Thu 01/24	Fri 01/25	Sat 01/26	Week Total	Sun 01/27	Mon 01/28	Tue 01/29	Wed 01/30	Thu 01/31	Fri 02/01	Sat 02/02	Week Total	Total
Holiday Pay		6.00						6.00								0.00	6.00
Totals:	0.00	6.00	0.00	0.00	0.00	0.00	0.00	6.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.00
Paid Summary																	
Holiday Pay		6.00						6.00								0.00	6.00

Week 1: Hours												
Hours Type	Sun 01/20	Mon 01/21	Tue 01/22	Wed 01/23	Thu 01/24	Fri 01/25	Sat 01/26	Total	Delete			
Holiday Pay 🔻		6.00						6.00				
<select hours="" type=""></select>								0.00				
<select hours="" type=""></select>								0.00				
Totals:	0.00	6.00	0.00	0.00	0.00	0.00	0.00	6.00				
				Press the bu	itton to the ri	ight to delete	e all checked	l items	Delete			

- 2. 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 2.00, which is what the employee in the example worked that day. Cascading rules will apply when using Holiday balances.

	Leave used													
Please select a date to calculate balances:														
Future Approved Leave Requests (Calculated to 3/30/2019)														
Category Hours Approved														
Leave Cascading 0.00														
		Accrual Bala	nces ( Ca	Iculated to	3/30/2019)	)								
Category		Starting B	alance	Earned	Taken	Curren	t Balance							
PTO		242.40												
ESL			0.00	0.00	0.00		0.00							
<u>Holiday</u>			0.00	322.00	320.00		2.00							

#### **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.

	Input Summary																
Hours Type		<u>Mon</u> 01/21						Week Total					<u>Thu</u> 01/31	<u>Fri</u> 02/01		Week Total	Total
Regular		6.00	8.00	8.00	8.00	8.00		38.00		8.00	8.00	8.00	8.00	8.00		40.00	78.00
Holiday Pay		2.00						2.00								0.00	2.00
Totals:	0.00	8.00	8.00	8.00	8.00	8.00	0.00	40.00	0.00	8.00	8.00	8.00	8.00	8.00	0.00	40.00	80.00
							Comp	. Time E	lection								
Comp	0%	0%	0%	0%	0%	0%	0%		0%	0%	0%	0%	0%	0%	0%		
	Paid Summary																
Regular		6.00	8.00	8.00	8.00	8.00		38.00		8.00	8.00	8.00	8.00	8.00		40.00	78.00
Holiday Pay		2.00						2.00								0.00	2.00

w	orked Hours	s on Mon	day 01/21/	19	Hide Exc	eptions
Time In/Out	Overnight	Hours	Minutes	Hours Type	Message	Delete
Time In:         8         00         A.M.         ~           Time Out:         2         00         ~         P.M.         ~		6	00	Regular v		
Time In:         ~         ~         ~           Time Out:         ~         ~         ~         ~		0	00	< Select Hours Type > v		
Time In:         ~         ~           Time Out:         ~         ~         ~		0	00	< Select Hours Type > 🗸		
Time In:         ~         ~         ~           Time Out:         ~         ~         ~         ~		0	00	< Select Hours Type > ~		
Time In:         ~         ~           Time Out:         ~         ~         ~		0	00	< Select Hours Type > ~		
	Total:	6	00	Press the button to the right to delete	checked items	Delete

Please Enter Exception Hours Taken, If Any:

	Exception Time Monday 01/21/19												
Hours	Minutes	Hours Type	Message	Delete									
02 🗸	00 ~	Holiday Pay 🗸											
~	~	<select type=""> 🗸</select>											

- 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.

Acc	rual Balances ( Cal	culated to	2/2/2019	9)		
Category	Starting Balance	Earned	Taken	Current Balance		
PTO	142.20	815.21	767.25	190.16		
Comp	0.00	0.00	0.00	0.00		
ESL	0.00	0.00	0.00	0.00		
<u>Holiday</u>	0.00	344.00	338.00	6.00		



#### 5.9 Making Prior Pay Period Adjustments

Supervisors and Payroll Coordinators have the ability to make prior pay period adjustments up to three pay periods in the past. If an adjustment needs to be made further back than three pay periods OR the adjustment crosses calendar years, you will need to complete a **Prior Period Adjustment form** located on the **Payroll Services Forms and Tools** website.

1. Click the **History** tab and then **Timesheet Group**.

n. The U	UNIVERSITY of OKLAHOMA	Employee Tasks	Manager Tasks	Messages	Employee Setup	History	Reports Lo	og Off	Help
• Не	alth Sciences Center	Timesheet Tim	nesheet Group						
2.	Select the Times Only the Periods Supervisors or Pa	heet Group which state ayroll Coor	and relativ e "Adjustm dinators.	e Period ents Allo	in the dropd owed" can be	lown and e adjuste	d click ed by	go	
Timesh	eet Group: ADM000-Lastnam	ne-000000* - Full	🗸 Per	iod 02/17/20	19 - 03/02/2019 (Hi	istory - Adjust	tments Allow	ed) B1	v 👳
2	Calaat tha arresta		1	1 1.					

3. Select the employee's timesheet that needs to be adjusted.

History - Adjustments Allowed														
	[<< Previous Page] Page 1 of 1 [Next Page >>]													
Hours Summary for 02/17/2019 - 03/02/2019 - B1														
Employee Name	Туре	Regular	Exception	Total Hours	Notes	Attachments	# Messages							
Employee Name	History Adjust													
Employee Name	History Adjust													
Employee Name	History Adjust													

TOP

4. Click the **Create Adjustment** button at the top left of the timesheet.

						Histo	ry Pay F	Period D	etails)								
Create Adjustments							I	History	input Su	immary							
Hours Type	Sun 02/17	Mon 02/18	Tue 02/19	Wed 02/20	Thu 02/21	Fri 02/22	Sat 02/23	Week Total	Sun 02/24	Mon 02/25	Tue 02/26	Wed 02/27	Thu 02/28	Fri 03/01	Sat 03/02	Week Total	Total
Totals:	is: 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.											0.00					

5. This will open an adjustment timesheet (below the original) that can be used to make a correction. An example of a correcting entry would be if an employee didn't originally enter leave taken unscheduled on their timesheet for 16 hours but it needs to be entered, the payroll coordinator or supervisor would then enter 16 hours of leave taken unscheduled on the adjustment timesheet. (See example)

	Adjustments Input Summary																
		Week 1 Week 2															
Hours Type	Sun 02/17	n Mon Tue Wed Thu Fri Sat Week Sun Mon Tue Wed Thu Fri Sat W 17 02/18 02/19 02/20 02/21 02/22 02/23 Total 02/24 02/25 02/26 02/27 02/28 03/01 03/02 T												Week Total	Tota		
Totals:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
					_	We	ek 1: Ad	ljustme	nts	<b>→</b>							
		Нои	rs Type			We Sun	ek 1: Ad	ljustme Ti	nts	→ Wed	Th	u	Fri	Sat	Tot	al	
		Нои	rs Type			We Sun 02/17	ek 1: Ad Mon 02/18	ljustme Ti 3 02	nts ue 2/19	→ Wed 02/20	Th 02/;	u 21	Fri 02/22	Sat 02/23	3 Tot	al	
	Lea	Hou ve Take	rs Type n Unsch	eduled		We Sun 02/17	ek 1: Ad Mon 02/18 8.0	ljustmer 3 02 0 3	nts ue 2/19 8.00	→ Wed 02/20	Th 02/2	u 21	Fri 02/22	Sat 02/23	3 Tot	al 00	-
	Lea	Hou ve Take <sele< td=""><td>rs Type n Unsch</td><td>eduled s Type≻</td><td></td><td>We Sun 02/17</td><td>ek 1: Ad Mon 02/18 8.0</td><td>ljustmer 3 02 0 (1)</td><td>nts iue 2/19 8.00</td><td>→ Wed 02/20</td><td>Th 02/2</td><td>u 21</td><td>Fri 02/22</td><td>Sat 02/23</td><td>3 Tot</td><td>al 00</td><td></td></sele<>	rs Type n Unsch	eduled s Type≻		We Sun 02/17	ek 1: Ad Mon 02/18 8.0	ljustmer 3 02 0 (1)	nts iue 2/19 8.00	→ Wed 02/20	Th 02/2	u 21	Fri 02/22	Sat 02/23	3 Tot	al 00	

6. Click Save



**NOTE:** The original timesheet will remain on the screen for reference. If the Payroll Coordinator enters the adjustment, the Supervisor will need to review and approve the adjustment in order for it to be processed along with the next bi-weekly payroll and vice versa if the Supervisor enters the adjustment. These must be approved by the time timesheets are locked on the Monday following the end of a pay period. If not approved, they will not be processed during that pay cycle.

#### 5.10 Reviewing & Approving Prior Pay Period Adjustments

Supervisors and Payroll Coordinators have the ability to review and approve prior pay period adjustments up to three pay periods in the past. If an adjustment needs to be approved further back than three pay periods, you will need to contact Payroll Services.

#### **Find Pending Adjustments**

1. Click the **Reports** tab and then navigate to the Adjustment Status report as shown below.

# Health Sciences Center

Health Sciences Center	Employee Tasks Manager Tasks	Messages	Employee Setup	History	Reports	Log Off Help
Reports		D	etails View			
			Report Definition Descrip Last	Title: A tion: T c T a Run:	djustment S he Adjustm oncerning t his report d pproved an	Status nent Status report provides information the current status of any pending adjustments. Joes not show the adjustments which are dd processed.
Timeshee Reauts Timeshee Status Timesheet Validation			Saved Filters	red ✓	Published	Creato/Edit Filter  Title: Adjustments Status All Description: Shared Published  And Approval Status Equals Hot Approved  Processed Status Equals Pending

- 2. The report is defaulted to the correct parameters of Approval Status "Not Approved" and Processed Status "Pending."
- 3. Click the grid icon () in the center section to see the results (see below).

Employee Numbe	Pay Group	Employee Name	Pay Period	Timesheet Group	Payroll Coordinator	Entered By	Entered On
522138	NEX	Employee Name	9/29/2018	ADM301-Name-000000	Payroll Coord Name	Entered By Name	19 Mar 2019 12:02PM Central Time
531798	EXM	Employee Name	11/24/2018	ADM301-Name-000000	Payroll Coord Name	Entered By Name	19 Mar 2019 11:48AM Central Time
535970	NEX	Employee Name	11/24/2018	ADM301-Name-000000	Payroll Coord Name	Entered By Name	19 Mar 2019 11:53AM Central Time
522138	NEX	Employee Name	1/5/2019	ADM301-Name-000000	Payroll Coord Name	Entered By Name	13 Mar 2019 4:03PM Central Time
534996	EXM	Employee Name	1/5/2019	ADM301-Name-000000	Payroll Coord Name	Entered By Name	13 Mar 2019 4:03PM Central Time
502097	EXM	Employee Name	2/2/2019	ADM301-Name-000000	Payroll Coord Name	Entered By Name	18 Mar 2019 5:05PM Central Time
531474	NEX	Employee Name	2/2/2019	ADM301-Name-000000	Payroll Coord Name	Entered By Name	19 Mar 2019 10:42AM Central Time
538336	EXM	Employee Name	3/2/2019	ADM301-Name-000000	Payroll Coord Name	Entered By Name	22 Mar 2019 2:26PM Central Time

4. Approve/Delete the pending adjustments following the instructions below.

#### **Approve/Delete Pending Adjustments**

1. Navigate to the **History**, **Timesheet Group** tab. Select the Timesheet Group and Pay Period that were listed on your previous report. Click go.



Click on the relevant employee's name to review the original timesheet at the top, and the adjusted timesheet at the bottom. When finished reviewing, if everything is correct, click the Return (
 ) button to return to the results page. If everything is not correct, see step 4 below.

# Health Sciences Center



3. On the results page you will see the box. Check the box next to Approve and click Submit.

The UNIVERSITY of OKLAHOMA	Employee Tasks	Manager	Tasks	Messages	Employe	e Setup	History	Reports	Log Off	Help
Health Sciences Center	Timesheet Timeshe	et Group	<b>b</b>							
Timesheet Group:	*-Full 🗸 Pay	Period:	02/17/20	019 - 03/02/2	019 (History -	Adjustn	nents Allowed)	B1 🧹 😰		
				His	tony Adjust	mante /	llowed			
			1	<pre>///</pre>	Page] Pag	e 1 of 1	[Next Page :	>>]		
				Hours Sum	nary for 02/1	7/2019 -	03/02/2019 - 6	31		
	Employee Name	Туре	Regular	Exception	Total Hours	Notes	Attachments	# Messages	Approved	Action
	Employee Name	History Adjust		16.00	16.00					
	Employee Name	History Adjust								
	Employee Name	History Adjust								
		Press	the button	to the right	to approve/ur	approve	all checked it	ems		Submit
					то	P				
					10	<u>.</u>				

4. **Delete or deny adjustment:** If the adjustment is incorrect, contact the person who made the adjustment to fix it. If the adjustment was started in error, or if it needs to be declined, click at the top right of the screen while reviewing the timesheet, which will delete the adjustment.

Fimesheet Group: *ADM	•	- Full	~	Pay	Period:	02/17/	2019 - 0	3/02/20	19 (Hist	ory - Ac	ljustment	s Allow	ed) B1	~ (	0		8			<b>b</b>	x 🗐 🐵 🕲 🖻
			La	st Name	e:		G	0 [<*	< Previo	ous Emp	ployee]	Emplo	yee 1 c	of 3 [	lext Emp	oloyee	>>]				
						Timest	neet Gr	Time:	sheet E	mploye	e Informa	ation	Status	: Activ	<i>ie</i>						
						Histon	v Status	(Not Co	mplete	d. Not /	Approved	I. Proce	essed)								
										_				9							
	_							H	istory P	ay Peri	od Detail	5									
	Ho.	urr Tuno	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Week	Sun	Mon	Tue	Wed	Thu		Sat	Week	Total		
	Tot	als:	02/17	02/18	02/19	02/20	02/21	02/22	02/23	Total	02/24	02/25	02/26	02/27	02/28	03/01	03/02	Total	0.00		
						Adj	justme	Ad nts Sta	atus (N	lot App	proved,	e Not Pr	ocess	sed)							
								<u>Adju</u>	ustment	s Pay P	eriod Det	ails									_
								Adj	ustmer	nts Inpu	ut Summa	згу									
				Sun	Mon	Tue	Wed	<u>k 1</u> Thu	Fri	Sat	Week	Sun	Mon	Tue	Wed	<u>k 2</u> Thu	Fri	Sat	Week	Tetal	
	Leave Take	n Unsche	duled	02/17	02/18 8.00	02/19 8.00	02/20	02/21	02/22	02/23	Total	02/24	02/25	02/26	02/27	02/28	03/01	03/02	Total	16.00	6
	Totals:		uncu	0.00	8.00	8.00	0.00	0.00	0.00	0.00	16.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	16.00	
									Pai	d Sumr	mary			_							
	Paie	d Leave			8.00	8.00					16.00								0.00	16.00	
	Paie	d Leave	1	_	8.00	8.00			Falu	summa	16.00								0.00	16.00	
	L																	1			I
								Wee	ok 1: Ar	liustme	ents -	<b>→</b>									
			Hou	rs Type			Sun	Mon		Tue	Wed	Th			Sat	То	tal	Delete			
		Lea	ve Taker	n Unsch	neduled		02/17	02/1	8 0 00	2/19	02/20	02/:	21	02/22	02/2	3 16.	.00				
			<sele< td=""><td>ct Hour</td><td>s Type&gt;</td><td></td><td>_</td><td></td><td></td><td></td><td></td><td></td><td>╡┟</td><td></td><td></td><td>0</td><td>.00</td><td></td><td></td><td></td><td></td></sele<>	ct Hour	s Type>		_						╡┟			0	.00				
			<sele< td=""><td>ct Hour</td><td>s Type&gt;</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>36</td><td></td><td></td><td>0</td><td>.00</td><td></td><td></td><td></td><td></td></sele<>	ct Hour	s Type>								36			0	.00				
		Totals:					0.00	8.	00	8.00	0.00	0	0.00	0.00	0.	00 16	.00				
										Press	the butto	n to the	right t	o delete	all che	ked ite	ms [	Delete			

## 6 Messages and Emails

After successfully signing in, the system will open with an informational screen which is broken into sections. This same message screen can be accessed at any time by navigating to the Message menu.

The UNIVERSITY of OKLAHOMA	Employee Tasks	Manager Tasks	Messages	Employee Setup	History	Reports	Log Off	Help
Health Sciences Center	Welcome to HBS 1	Time System						

1. The first section is system messages:





2. The next section will have the holiday schedule for the year if the employee is holiday eligible.

Employees	Messages
Holiday Schedule for Eh	hrhart,Julie G (506206)
Holiday	2019
New Years Day	Tuesday Jan 01, 2019
Martin Luther King Jr. Day	Monday Jan 21, 2019
Memorial Day	Monday May 27, 2019
Independence Day	Thursday Jul 04, 2019
Labor Day	Monday Sep 02, 2019
Thanksgiving Day	Thursday Nov 28, 2019
Day after Thanksgiving	Friday Nov 29, 2019
Christmas Eve	Tuesday Dec 24, 2019
Christmas Day	Wednesday Dec 25, 2019
Winter Break 1	Monday Dec 30, 2019
Winter Break 2	Tuesday Dec 31, 2019

3. The third and last section are message/alerts from the system directed to the user. These would be alerts on timesheets, employees, etc.

		Manager Messages
Pending Timeoff requests for	Employee Name	with a status of Pending as of Mar 22 2019 4:18PM Eastern Time
Pending Timeoff requests for	Employee Name	with a status of Pending as of Mar 22 2019 4:18PM Eastern Time

Messages that appear on the Messages page for Supervisors and Payroll Coordinators will include:

- FMLA Time Charged Outside of the Incident
- Time Off Request
- Unapproved Timesheets Exists

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

Action	System generates email to						
Completed Adjustment Pending	Employee's supervisor,						
	Payroll Coordinator						
FMLA Request has been Initiated	Payroll Coordinator						
FMLA Time Charged Outside of the Incident	Employee's supervisor,						
	Payroll Coordinator						
FMLA Time Off Request	Employee's supervisor						
Low Balance	Employee's supervisor						
Potential Overtime	Employee's supervisor						
Reminder to Review Leave Requests	Employee's supervisor						
Time Off Request	Employee's supervisor						
Unapproved Timesheets Exist	Employee's supervisor						

**NOTE:** Emails to the user regarding TAL notifications and updates will come from <u>EcotimeAlert@hbscorp.com</u>. Users who do not wish to receive emails in their inbox can set up a rule in Outlook to route TAL emails to an alternate folder. Do not, however, set these emails to automatically delete.

## 7 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.

#### **Reviewing an Employee's History Timesheet**

To review a history timesheet, click on the **History** tab and then **Timesheet Group** to review an employee's 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 2. The TAL system will display your prior pay period timesheet.

The UNIVERSITY of OKLAHOMA	Employee Tasks	Manager Tasks	Messages	Employee Setup	History	Reports	Log Off	Help
Health Sciences Center	Timesheet Time	esheet Group						

**NOTE:** History timesheets are read only and changes can only be made up to 3 pay periods back. Refer to section 5.9 regarding prior pay period adjustments.



### 8 Attendance

The system allows the Manager to review the actual time an employee has clocked in/out for the day or previous days.

 Click the Attendance tab under Manager Tasks, then select the Timesheet Group using the drop down menu and click as shown below:

The UNIVERSITY of OKLAHOMA	Employee Tasks Manager Tasks	Messages	Employee S	6etup ⊦	listory	Reports	Log Of	f Help
Health Sciences Center	Employee Timesheets Employee Ba	lances TimeOff	Approvals	Delegate /	Authority	On Call	Attendan	ce Find EE TS Gro
Timesheet Group: *ADM:	I* - Full Access 🗸 😥							
<i>₽</i>		Attendance date:	02/01/2019	<u>,</u> 🛃 R	etrieve [	)ata		
	<< Previous Day		Attendar Friday (	nce Details )2/01/2019			<u>Next D</u>	<u>ay &gt;&gt;</u>
	Employee Name	Schedule	٤	Start Time		E	ind Time	
	Employee Name	Description	Schedule	Actual	Status	Schedule	Actual	Status
	Employee Name	Not Scheduled		07:53 AM			11:27 AM	
	Employee Name	Not Scheduled		08:04 AM			12:00 PM	
	Employee Name	Not Scheduled		07:53 AM			12:00 PM	
	Employee Name	Not Scheduled		08:01 AM			11:23 AM	
				Retrie	eved on	Friday 03/22	2/2019 at 05	:08 PM

The system will default to the current day. To access information from the previous day, click << Previous Day. To access information for the next day, click Next Day</li>
 >>. To access any other day, enter the date in the Attendance date box and click Retrieve Data.

### 9 Reports

All reports are located under the Reports menu:



The reports section has many components. This is a summary of the report screen sections. This will be outlined step by step in the following sections.

# Health Sciences Center



#### 9.1 Accessing and Running a Report

There are many different reports available (listed below). To access and run a report, complete the following steps:

1. Expand the categories to see the report options. The double blue arrows expand all and collapse all.

Reports							
≪ ≫							
Enter text to search							
Title							
♥ Other Management Reports							
Employees Balances							
Pay Outs							
Time Collection							
Timesheet Collection From VPN							
Timesheet Modified After Completion							
<ul> <li>Payroll Processing</li> </ul>							
Adjustment Status							
Employee Info							
Timesheet Input							
Timesheet Results							
Timesheet Status							
Timesheet Validation							

2. Click the Report Title that you need to run. In the center of the screen you will see set filter option titles. Choose the filter that you need to run.

Saved Filters								
⊕      ⊞      ຟ								
Title	Shared	Published						
Timesheet Input By Date Range	V	V						
Timesheet Input by Pay Period	V	2						
Timesheet Modified by Someone Else	V	V						
Timesheet Notes	7	7						

3. On the right side, the reports have preset criteria. You can change the green and grey parts of the criteria for what you need to run. The green is the criteria options and the grey is the value. If you do not want to use one of the set criteria, you can click the <sup>(a)</sup> to remove that criteria which would be the same as "all" or "no filter" type options. In other words, in the printscreen below, if you do not want a specific timesheet group but instead want all timesheet groups you have access to, click the <sup>(a)</sup> and remove that criteria.

Create/Edi	t Filter							
0								
Title:	Timesheet Input By Date Range							
Description:								
	Shared 🗸 🛛 Published 🗸							
And	^							
Tim	esheet Group Equals <enter a="" value=""> (3)</enter>							
Emp	Noyee Equals <enter a="" value=""> 💿</enter>							
Tim	Timesheet Date <u>Is between</u> <enter a="" value=""> And <enter a="" value=""> ③</enter></enter>							
Hou	rs Type Equals <enter a="" value=""> 🔇</enter>							

4. After you set all your values for the data you need, click the grid in the middle section to run the report to a grid format. The grid report will pop up.

Employee Numbe	Pay Group	Employee Name	Pay Period	Timesheet Group	Payroll Coordinator	Entered By	Entered On 🔹
522138	NEX	Employee Name	9/29/2018	ADM301-Name-000000	Payroll Coord Name	Entered By Name	19 Mar 2019 12:02PM Central Time
531798	EXM	Employee Name	11/24/2018	ADM301-Name-000000	Payroll Coord Name	Entered By Name	19 Mar 2019 11:48AM Central Time
535970	NEX	Employee Name	11/24/2018	ADM301-Name-000000	Payroll Coord Name	Entered By Name	19 Mar 2019 11:53AM Central Time
522138	NEX	Employee Name	1/5/2019	ADM301-Name-000000	Payroll Coord Name	Entered By Name	13 Mar 2019 4:03PM Central Time
534996	EXM	Employee Name	1/5/2019	ADM301-Name-000000	Payroll Coord Name	Entered By Name	13 Mar 2019 4:03PM Central Time
502097	EXM	Employee Name	2/2/2019	ADM301-Name-000000	Payroll Coord Name	Entered By Name	18 Mar 2019 5:05PM Central Time
531474	NEX	Employee Name	2/2/2019	ADM301-Name-000000	Payroll Coord Name	Entered By Name	19 Mar 2019 10:42AM Central Time
538336	EXM	Employee Name	3/2/2019	ADM301-Name-000000	Payroll Coord Name	Entered By Name	22 Mar 2019 2:26PM Central Time

5. You can drag the titles to the section that says "Drag a column header here" to group the report. If you want to ungroup, drag the column back down.

Grid Preview				
<u>⊎</u> *				
Enter text to search				
Drag a column header here to group by that column				
Pay Period End Da Employee Numbe Employee N	ame Pay Group	Timesheet Date	Pay Code	DURATION

6. When you are ready to export/save the report click the icon and choose the file type you wish to save.

I.	Grid Preview								
	∫ ±	h							
	-	Export to PDF	F						
	₽	Export to DOCX	F						
	硘	Export to CSV	5						
	÷	Export to XLS	o,						
	8	Export to XLSX	6						
	4/5/2	010 52.40	04						

#### 9.2 Manager Reports

Report	Description
Adjustment Status	All pending (not approved) Prior Period Adjustments.
	Employee balances by timesheet group, employee,
	balance group (PTO, sick, vacation, etc), and/or balance
Employee Balances	date.
	All employee information including supervisor and
	payroll coordinator in the department by timesheet group,
Employee Info	employee, status, salary/hourly and employee category.
Pay Outs	Schedule balance payouts per period.
	Clock in/out information for hourly employees to include
	location (webclock ID or IP address) and duration
	between clocks. Can be run by timesheet group,
Time Collection	employee, and/or pay period end date.
Timesheet Collection from VPN	Employees who clocked in/out via VPN connection. Run
with IP	by Pay Period End Date.

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	Information input/recorded on employee timesheets
	including hours recorded per day, leave, clocking in/out,
	etc. Can be run by Timesheet Group, Employee, and/or
Timesheet Input by Date Range	Timesheet Date Range.
	Information input/recorded on employee timesheets
	including hours recorded per day, leave, clocking in/out,
	etc. Can be run by Timesheet Group, Employee, Pay
Timesheet Input by Pay Period	Period End Date, and/or Hours Type.
	All timesheets that have notes. Can be run by Pay Period
Timesheet Input Notes	End Date and/or Timesheet Group.
Timesheet Input Timesheet	Lists timesheets modified by another person. Can be run
Modified by Someone Else	by Timesheet Group and/or Pay Period End Date.
	Identifies employee timesheets that have been modified
	by another user (i.e. supervisor or coordinator) after the
Timesheet Modified After	employee completed their timesheet. Can be run by
Completion	Timesheet Group and/or Pay Period.
	Calculated data (what will be transferred for payment)
Timesheet Results - Calculated	from employees timesheets. This can be run by timesheet
Timesheet	group, employee, pay period end date, and/or hours type.
	Calculated data (what will be transferred for payment)
	from employees timesheets. This can be run by entire
Timesheet Results - Calculated	department (using department name) and/or pay period
Timesheet by Department	end date.
	List of employees and their timesheet status. Indicates if
	timesheets were completed/approved, by whom and the
	date. Run by Timesheet Group, Pay Period End date,
Timesheet Status	Completion Status and/or Approval Status.
	List of timesheet errors and warnings for all timesheets.
	Can be run by Timesheet Group, Employee, Pay Period
Timesheet Validation	End Date, Validation Level, and Validation Code.

## 10 FMLA Information

The FMLA section of the system allows employees to request FMLA, add FMLA time to timesheets, and track FMLA balances. Access to administer the FMLA section is restricted to the Leave Coordinator, who will process FMLA requests. Supervisors and managers will be responsible for ensuring that FMLA time is correctly reflected on an employee's timesheet.

10.1 Messages

When an employee requests FMLA, a web message and email is sent to the Payroll Coordinator and the Leave Coordinator. The employee is notified when the request is received, as shown below:



Your FMLA request for FMLA Health of Family Member was received on 04/30/2015. Your FMLA Representative is: Jessica Rodriguez, <u>jessica-a-rodriguez@ouhsc.edu</u> Please complete and return the required forms by the due dates.

The TAL system alerts the Payroll Coordinator that an employee has started the FMLA process. The Leave Coordinator will process and send all FMLA paperwork via email, ensuring that the appropriate Payroll Coordinator is included in all correspondence.

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



This message instructs the payroll coordinator to correct the error on the timesheet to reflect the actual FMLA time.

**NOTE:** Be sure to read the message(s) for important information and take action, if required. **Keep in mind that there may be notifications below the table, such as information about leave requests and timesheets.** Some messages will expire after a set amount of time and/or once an issue has been resolved.

## 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.

Input Summary																	
	Week 1						Week 2										
Hours Type	Sun 01/20	Mon 01/21	Tue 01/22	Wed 01/23	Thu 01/24	Fri 01/25	Sat 01/26	Week Total	Sun 01/27	Mon 01/28	Tue 01/29	Wed 01/30	Thu 01/31	Fri 02/01	Sat 02/02	Week Total	Total
Regular ACA			8.00	8.00				16.00			8.00	8.00				16.00	32.00
Totals:	0.00	0.00	8.00	8.00	0.00	0.00	0.00	16.00	0.00	0.00	8.00	8.00	0.00	0.00	0.00	16.00	32.00
Paid Summary																	
Regular ACA			8.00	8.00				16.00			8.00	8.00				16.00	32.00

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

		v	Veek 1:		$\rightarrow$				
Hours Type	Sun 01/20	Mon 01/21	Tue 01/22	Wed 01/23	Thu 01/24	Fri 01/25	Sat 01/26	Total	Delete
Regular ACA 🔻			8.00	8.00				16.00	
<select hours="" type=""> ▼</select>								0.00	
<select hours="" type=""> ▼</select>								0.00	
Totals:	0.00	0.00	8.00	8.00	0.00	0.00	0.00	16.00	
Press the button to the right to delete all checked items									

The drop menus in the bottom box list the different types of hours worked and leave taken that can be put on the timesheet.

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<Select Hours Type> Regular ACA Leave Taken Unscheduled Admin Leave Jury Duty Professional Leave Holiday Pay Leave Taken Scheduled Military Leave Military Leave W/O Pay FMLA PTO 1-5 (Manager Use) Extended Sick Leave Leave With Out Pay Leave Without Pay FMLA

Employees or the supervisor or payroll coordinator must use **Regular ACA** to record hours worked for the purposes of ACA reporting. These hours <u>do not</u> 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 <u>do</u> 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 (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.

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**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.

			Week	:1:	_	<b>&gt;</b>				
Hours Type		Sun 01/20	Mon 01/21	Tue 01/22	Wed 01/23	Thu 01/24	Fri 01/25	Sat 01/26	Total	Delete
Regular ACA	۲			5.00	5.00				10.00	
Leave Taken Scheduled	۲		2.00						2.00	
<select hours="" type=""></select>	۲								0.00	
Totals:		2.00	5.00	5.00	0.00	0.00	0.00	0.00	12.00	
Press the button to the right to delete all checked items									Delete	

#### 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.

### 12 Contact Information

Issue/Question	Who to Contact	Phone/Email Address
FMLA Issues/Questions	Human Resources	(405) 271-2180 or (918) 660-3195
TAL Issues/Questions	Payroll Services	(405) 271-2055 or payroll-services@ouhsc.edu
Wall Clock	IT Service Desk	(405) 271-2203 or servicedesk@ouhsc.edu
Issues/Repairs		
Wall Clock Orders	IT Service Desk	(405) 271-2203 or servicedesk@ouhsc.edu