The University of Oklahoma
Health Sciences Center

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

Table of Contents

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 can review and approve 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 departmental payroll coordinator or 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 before referring an employee to Payroll Services.
5. The payroll coordinator is the final timesheet reviewer, but should not be approving timesheets.

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 www.tal.ouhsc.edu 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 www.tal.ouhsc.edu 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 should complete 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.
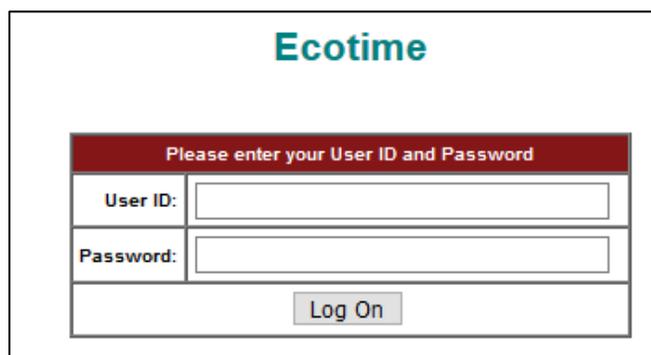
4   TAL Website General Navigation

4.1   Signing In

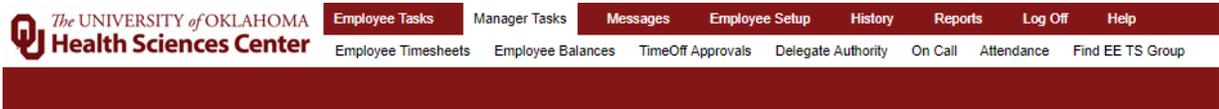All employees who have access to a computer can sign into TAL using his/her OUHSC network ID and password.

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

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.

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.
	Unapprove Pay Period – To unapproved the current selected timesheet.
	Notes – View, add and edit notes.

	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.
	Balances – Displays current leave balances up to the present day.
	Timesheet Audit – Shows all changes made to the selected timesheet.
	On Call – Add on call schedule assignment.
	Return – Returns to previous screen or selection.
	Print – Prints the timesheet.
	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 completed 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.
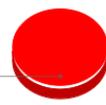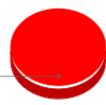
1. Choose **"Primary" as the Timesheet Group** see all employees you are the primary supervisor or payroll coordinator for.

   | Timesheet Group: | Primary ▼ | Period | 02/17/2019 - 03/02/2019 B1 ▼ | go |

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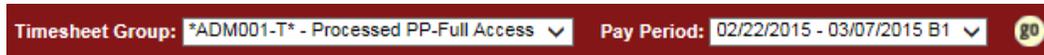
3. A **Timesheet Statistics** summary will show on your screen after you search by Primary or a specific Timesheet Group. This is an interactive chart. You can click on any red heading to go to the list of applicable individuals. For example, in the printscreen below, there is one person with an Attachment.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

Timesheet Statistics

Completion		Total Timesheets 79			Approval	
	Approved	0	Not Approved	79	Completed	0
Not Completed 100%	Not Completed	79	Validation Errors	1	Validation Warnings	0
	Notes	0	Addl Hours	0	Attachments	1
	Attachments	1			Not Approved 100%	

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

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										☐ Approve
Timesheet Group Full Access	**Employee Name** Exempt/Salary/B1										☐ Approve
Timesheet Group Full Access	**Employee Name** Exempt/Salary/B1										☐ Approve
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/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 ☐ 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 🔼 . Do not use the browser's back button.

NOTE FOR SUPERVISORS:
- **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 minus any recorded leave without pay.**
- 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.
- Whether a timesheet is completed/approved or not does not determine if an employee is paid or not. See above bullets.

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. Payroll Coordinators should not be approving timesheets that are left unapproved by the Supervisors/Delegated Supervisors.

Hours Summary Screen Definitions:

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.**
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 **approve** or **unapprove** checkbox based on available action.

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List of Warnings

Warning Flag	Description
1	FMLA Exceed Planned Hours
C	Paid Leave Shift > Shift
G	Hours/Day > 12
H	Hours/Week > 70
J	Invalid Holiday
K	< Hours/Week
O	Insufficient PTO
P	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
B	Time In = Time Out
D	Employee Not Active
E	Employee Not Found
F	> 24 Hours/Day
I	Notes Required
M	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 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										☐ Approve
Timesheet Group Full Access	Employee Name Exempt/Salary/B1										☐ Approve
Timesheet Group Full Access	Employee Name Exempt/Salary/B1										☐ Approve
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/unapprove all checked items											Submit

The system will display the employee's detailed timesheet:

Show Pay Period Details

					Timesheet Summary												**Hide**
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> ⌄									0.00
<Select Hours Type> ⌄									0.00
<Select Hours Type> ⌄									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 ⬜ button.

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										☐ Approve
Timesheet Group Full Access	Employee Name Exempt/Salary/B1										☐ Approve
Timesheet Group Full Access	Employee Name Exempt/Salary/B1										☐ Approve
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/unapprove all checked items											Submit

The system will display the employee's detailed timesheet.

Show Pay Period Details

Timesheet Summary																	Hide
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
Comp. Time Election																	
Comp	0%	0%	0%	0%	0%	0%	0%		0%	0%	0%	0%	0%	0%	0%		

Worked Hours on Wednesday 02/20/19						Show Exceptions
	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:

Exception Time Wednesday 02/20/19			
Hours	Minutes	Hours Type	Message
⌄	⌄	\<Select Type\> ⌄	
⌄	⌄	\<Select Type\> ⌄	
⌄	⌄	\<Select Type\> ⌄	
⌄	⌄	\<Select Type\> ⌄	

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										☐ Approve
Timesheet Group Full Access	**Employee Name** Exempt/Salary/B1										☐ Approve
Timesheet Group Full Access	**Employee Name** Exempt/Salary/B1										☐ Approve
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/unapprove all checked items											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 ⚠ next to the day on which the employee had an incorrect time punch.

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

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 http://www.ouhsc.edu/policy/#300 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 http://tal.ouhsc.edu). 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.

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

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.

6. Your saved data will display.

| 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.

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<u>**Viewing Employee Balances**</u>

1. Click **Employee Balances** under **Manager Tasks**. Choose the relevant Timesheet Group and click go.
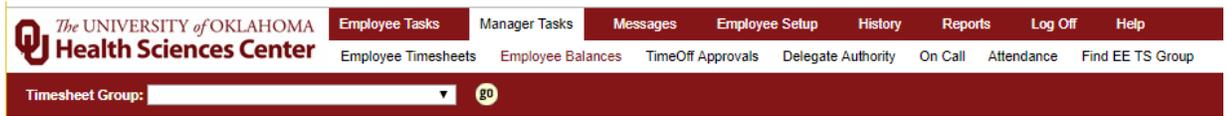
2. Employees are displayed one at a time. Use the arrows to scroll through the employees or the Search box to search for an employee.

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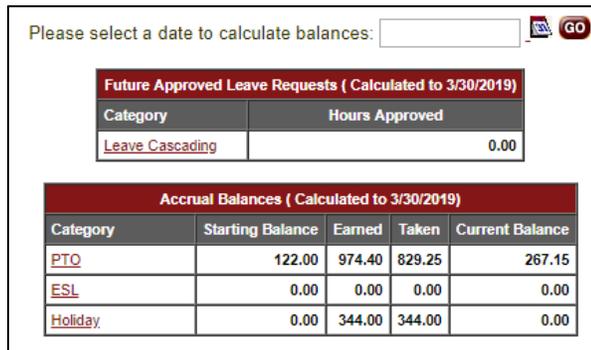
Balance Screen:

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 Balance	Leave that has been approved by supervisor but has not yet 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)				
Category	Starting Balance	Earned	Taken	Current Balance
PTO	0.00	515.22	478.25	36.97

Date	Description	Hours	Totals	Source
02/13/2019	Paid Leave	-8.00	36.97	Cascaded to Leave Taken Scheduled
02/12/2019	Paid Leave	-8.00	44.97	Cascaded to Leave Taken Scheduled
02/03/2019	Earned	8.31	52.97	Entitlement
01/20/2019	Earned	8.31	44.66	Entitlement
01/14/2019	Paid Leave	-7.00	36.35	Cascaded to Leave Taken Unscheduled

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 Leave Accrual for Health Sciences Center Programs 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.

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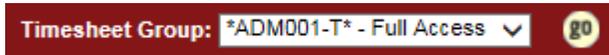Health Sciences Center

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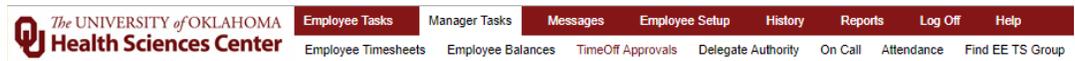
2. Select the **Timesheet Group** using the dropdown menu and click as shown below:

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

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:

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

   Click [Return to Timesheet Group] 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.

<u>Using the Calendar Function in TimeOff Approvals</u>
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.

<<	March 2019					>>
Sun	**Mon**	**Tue**	**Wed**	**Thu**	**Fri**	**Sat**
24	25	26	27	28	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	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 View 03/17/2019 – 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.

2. Enter your comment, question, etc in the Notes box and click [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:

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:

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

Delegating Authority to Supervisors is requested through the PS-Security team on the **Time, Attendance, and Leave (TAL) Security Changes** form located on the **Payroll Services Forms and Tools** website. All supervisor delegations must be of higher authority than the employees whose timesheets he/she is approving. Delegations must be approved by the current supervisor and the department head.

Failure to monitor employee time reporting and leave in an appropriate manner is in violation of University policy.

## 5.6   Delegating Authority for Payroll Coordinators

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

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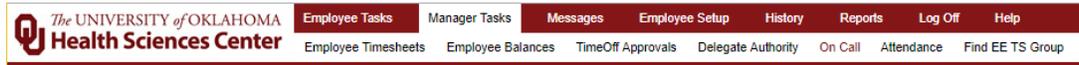
2. Choose the relevant **Timesheet Group** and click Go. Choose the relevant employee by clicking on the **Employee Name**.

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**.

4. 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.
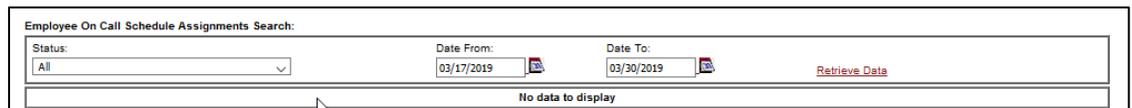
Sample results will look like this:

The University of Oklahoma
Health Sciences Center

Friday 03/22/2019 - Saturday 03/30/2019						
Date	Time In	Time Out	Title Code	Status	Delete	Select All ○ Unselect All ○
			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.

Show Pay Period Details

Pay Period Summary																Hide
Hours	Sun 05/17	Mon 05/18	Tue 05/19	Wed 05/20	Thu 05/21	Fri 05/22	Sat 05/23	Week Total	Sun 05/24	Mon 05/25	Tue 05/26	Wed 05/27	Thu 05/28	Fri 05/29	Sat 05/30	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
Pager	☑	☑	☑	☑	☑	☑	☑		☑	☑	☑	☑	☑	☑	☑		
Comp. Time Election																	
Comp	0%	0%	0%	0%	0%	0%	0%		0%	0%	0%	0%	0%	0%	0%		
Paid Summary																	
On Call Schedule (OC1)	1.00							1.00	2.00	1.00	2.00				1.00	4.00	6.00

Worked Hours on Tuesday 05/19/15					Show Exceptions
	Time In/Out	Overnight	Hours	Minutes	Hours Type	Message
Time In: / Time Out:	⌄ ⌄ ⌄ / ⌄ ⌄ ⌄	☐	0	00	⌄	
Time In: / Time Out:	⌄ ⌄ ⌄ / ⌄ ⌄ ⌄	☐	0	00	⌄	
Time In: / Time Out:	⌄ ⌄ ⌄ / ⌄ ⌄ ⌄	☐	0	00	⌄	
Time In: / Time Out:	⌄ ⌄ ⌄ / ⌄ ⌄ ⌄	☐	0	00	⌄	
	Total:		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 Back on Wall Clock or Web Clock: When an employee gets called back in, they will use the Wall Clock or the Web Clock. If an employee uses the Web Clock, they will use the Called In button. If an employee uses the Wall Clock, they will use the IN Call Back button.
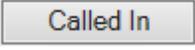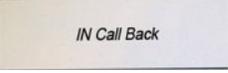
Show Pay Period Details

Hours	Sun 05/17	Mon 05/18	Tue 05/19	Wed 05/20	Thu 05/21	Fri 05/22	Sat 05/23	Week Total	Sun 05/24	Mon 05/25	Tue 05/26	Wed 05/27	Thu 05/28	Fri 05/29	Sat 05/30	Week Total	Total
Pay Period Summary																	**Hide**
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	☑	☑	☑	☑	☑	☑	☑		☑	☑	☑	☑	☑	☑	☑		
Comp. Time Election																	
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

Worked Hours on Tuesday 05/19/15							**Show Exceptions**
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: ▽ ▽ ▽ Time Out: ▽ ▽ ▽		☐	0	00	▽		
Time In: ▽ ▽ ▽ Time Out: ▽ ▽ ▽		☐	0	00	▽		
Time In: ▽ ▽ ▽ Time Out: ▽ ▽ ▽		☐	0	00	▽		
Time In: ▽ ▽ ▽ Time Out: ▽ ▽ ▽		☐	0	00	▽		
Total:			2	00	Press the button to the right to delete 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 Health Sciences Center	Employee Tasks	Messages	History	Log Off	Help
	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> ▼								0.00	
<Select Hours Type> ▼								0.00	
Totals:	0.00	6.00	0.00	0.00	0.00	0.00	0.00	6.00	

Press the button to the right to delete all checked 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.

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Leave used

Please select a date to calculate balances: [   ] [📅] [GO]

Future Approved Leave Requests (Calculated to 3/30/2019)	
Category	Hours Approved
Leave Cascading	0.00

Accrual Balances (Calculated to 3/30/2019)				
Category	Starting Balance	Earned	Taken	Current Balance
PTO	29.75	974.40	761.75	242.40
ESL	0.00	0.00	0.00	0.00
Holiday	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	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		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 Election																	
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

Worked Hours on Monday 01/21/19						**Hide Exceptions**	
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 ∨		☐
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:	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> ∨		

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.

Accrual Balances (Calculated to 2/2/2019)				
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
Holiday	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**.

2. Select the Timesheet Group and relative Period in the dropdown and click .
Only the Periods which state "Adjustments Allowed" can be adjusted by Supervisors or Payroll Coordinators.

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	Type	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.

History Pay Period Details

Create Adjustments	History Input Summary															
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:	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

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)

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.

The University of Oklahoma Health Sciences Center

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 Number	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.

2. 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.

Employee Name	Type	R
Employee Name	History Adjust	

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

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.

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.

1. The first section is system messages:

Messages

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 manuals and information available on the Payroll Services website (https://www.ouhsc.edu /financialservices/Payroll/default.asp).

2. Contact your departmental payroll coordinator.

3. Contact Payroll Services (405) 271-2055 or by email Payroll-Services@ouhsc.edu.

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

Employees Messages

Holiday Schedule for Ehrhart, 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 EcotimeAlert@hbscorp.com. 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 [go]. The TAL system will display your prior pay period timesheet.

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.

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

2. The system will default to the current day. To access information from the previous day, click <u><< Previous Day</u>. To access information for the next day, click <u>Next Day >></u>. 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.

The University of Oklahoma
Health Sciences Center
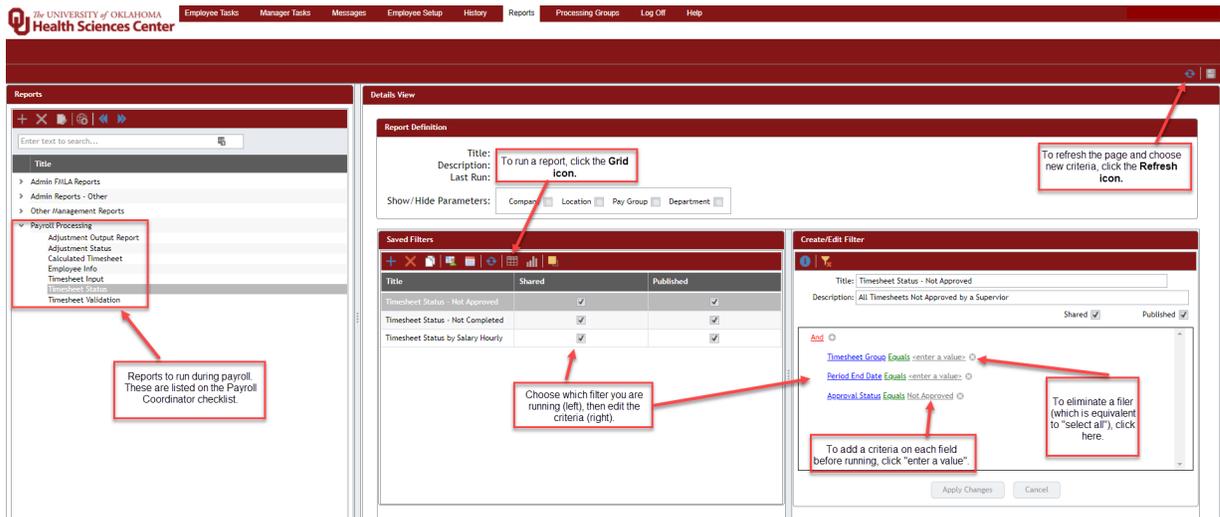
9.1   Accessing and Running a Report

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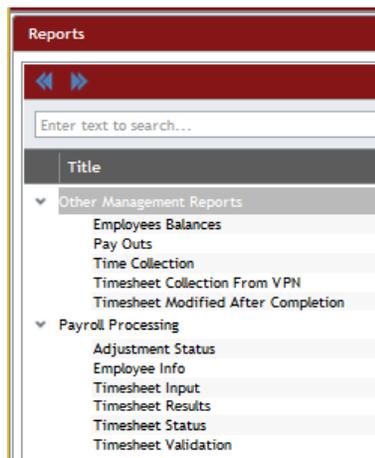
2. Click the Report Title that you need to run. In the center of the screen you will see set filter option titles. Choose the filter that you need to run.

Saved Filters		
Title	Shared	Published
Timesheet Input By Date Range	✔	✔
Timesheet Input by Pay Period	✔	✔
Timesheet Modified by Someone Else	✔	✔
Timesheet Notes	✔	✔

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 ⊗ 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 ⊗ and remove that criteria.

Create/Edit Filter

Title: Timesheet Input By Date Range
Description:

Shared ✔   Published ✔

And

Timesheet Group Equals <enter a value> ⊗

Employee Equals <enter a value> ⊗

Timesheet Date Is between <enter a value> And <enter a value> ⊗

Hours Type Equals <enter a value> ⊗

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 Number	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.
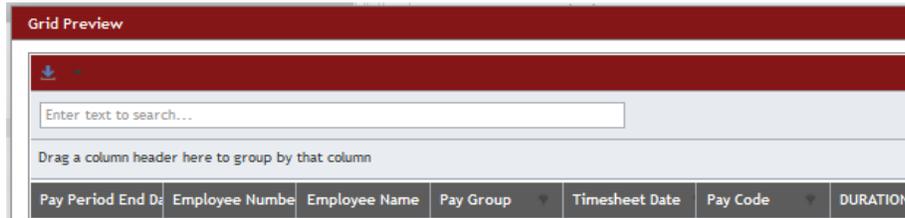
6. When you are ready to export/save the report click the ⬇ icon and choose the file type you wish to save.
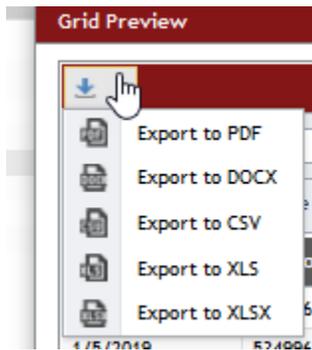
9.2 Manager Reports

Report	Description
Adjustment Status	All pending (not approved) Prior Period Adjustments.
Employee Balances	Employee balances by timesheet group, employee, balance group (PTO, sick, vacation, etc), and/or balance date.
Employee Info	All employee information including supervisor and payroll coordinator in the department by timesheet group, employee, status, salary/hourly and employee category.
Pay Outs	Schedule balance payouts per period.
Time Collection	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, employee, and/or pay period end date.
Timesheet Collection from VPN with IP	Employees who clocked in/out via VPN connection. Run by Pay Period End Date.
Timesheet Input by 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, and/or 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 Period End Date, and/or Hours Type.
Timesheet Input by Pay Period	
Timesheet Input Notes	All timesheets that have notes. Can be run by Pay Period End Date and/or Timesheet Group.
Timesheet Input Timesheet Modified by Someone Else	Lists timesheets modified by another person. Can be run by Timesheet Group and/or Pay Period End Date.
Timesheet Modified After Completion	Identifies employee timesheets that have been modified by another user (i.e. supervisor or coordinator) after the employee completed their timesheet. Can be run by Timesheet Group and/or Pay Period.
Timesheet Results - Calculated Timesheet	Calculated data (what will be transferred for payment) from employees timesheets. This can be run by timesheet group, employee, pay period end date, and/or hours type.
Timesheet Results - Calculated Timesheet by Department	Calculated data (what will be transferred for payment) from employees timesheets. This can be run by entire department (using department name) and/or pay period end date.
Timesheet Status-Not Approved	List of employees who's timesheet has not been approved by a Supervisor. Run by Timesheet Group, Pay Period End date, and Approval status=Not Approved.
Timesheet Status-Not Completed	List of employees who have not completed their timesheet. Run by Timesheet Group, Pay Period End date, and Completion status=Not Completed
Timesheet Validation	List of timesheet errors and warnings for all timesheets. Can be run by Timesheet Group, Employee, Pay Period End Date, Validation Level, and Validation Code.
Adjustment Output	Lists all prior period adjustments that were processed on the current payroll.

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, jessica-a-rodriguez@ouhsc.edu

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:

has time charged to an FMLA Incident FMLA Health of Family Member from 05/01/2015 to 06/30/2015 and that time is no longer valid.The reason it is invalid is because Time Charged Outside of FMLA Timeframe.

Time Charged Outside of FMLA Timeframe

Timesheet Date	Pay Code	Duration	Source
04/28/2015	Leave Taken Scheduled	8.00	Open Period Timesheet
04/29/2015	Leave Taken Scheduled	8.00	Open Period Timesheet
04/30/2015	Leave Taken Scheduled	8.00	Open Period Timesheet

Please review the timesheets and take the necessary action.05/01/2015

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.

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

					Week 1								Week 2					
Input Summary																		
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

Week 1:				→					
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> ▼								0.00	
<Select Hours Type> ▼								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					Delete	

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

```
<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.

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.

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 Issues/Repairs	IT Service Desk	(405) 271-2203 or servicedesk@ouhsc.edu
Wall Clock Orders	IT Service Desk	(405) 271-2203 or servicedesk@ouhsc.edu