Time, Attendance and Leave (TAL)

Users Guide for Hourly Employees

1. Overview

   The TAL system is designed to ensure employee's time and attendance are recorded properly and routed through appropriate channels.

   Note: TAL related emails will come from EcotimeAlert@hbscorp.com.

2. <u>Employee's Responsibilities</u>
    1. Enter time using either the web clock or the wall clock.
    2. Submit leave requests to his/her supervisor for approval.
    3. Review time and leave entry on his/her last working day of the pay period.
    4. Inform his/her supervisor of any corrections prior to the end of the pay period or as soon as possible.
    5. Electronically approve the time sheet by marking it as complete. This will allow review and approval by the employee's supervisor and payroll coordinator.

3. Signing into a Wall Clock

    Wall clocks are **touchscreen** devices mounted on the wall that communicate with the TAL system. **NOTE**: **you must clock out with the same method you used to clock in** (ie. you can clock in and out several times a day on different wall clocks but you cannot clock out on a web clock if you clocked in on a wall clock).

    Step 1 – sign in by swiping the black strip of your OUHSC One Card (picture side up) along the bottom slot of the wall clock. If you do not have your One Card you may enter your six-digit HR ID number on the touchscreen and touching OK.

    Step 2 – touch the button to perform the needed function as follows:

Display	Definition
In	This button is used to clock in at the beginning of a shift, including returning from meal breaks.
Out	This button is used to clock out at the end of a shift, including the start of meal
Exit	This button gives the ability to cancel the operation and go back to the beginning or back to the previous screen.
More	This button gives access to additional items, outlined next. Employees should not utilize the buttons outlined below unless instructed to do so.

In With	This button is used only for employees who are clocking in as a standardized patient. The next screen will prompt the user to select which standardized patient code to use for his/her shift in a drop down menu.
Transfer	This button is used to add or change a job code during a shift.
In Call	This button is used only when a user is clocking in while on call.

4. Signing into a Web Clock

From an **OUHSC** network **computer**, using **Internet Explorer** you can access the web clock at: www.tal.ouhsc.edu by selecting the **Web Clock link**, entering your network ID and password, clicking [Log On] and selecting In or Out. The system will time out after 10 seconds if no further action is taken.

5. General Navigation of TAL Website

1. **Signing in**: All employees who have access to a computer can sign into TAL using his/her OUHSC network ID and password.
NOTE: the TAL system is best viewed in **Internet Explorer**.
Step 1 – Access the TAL system: Go to www.tal.ouhsc.edu and click the **TAL link**.

Step 2 – Enter OUHSC ID and password and click [Log On] .

2. **Menu bar**: Clicking on any of the tabs (**Timesheet, Web Clock, Balances, TimeOff Request**, or **FMLA Request**), will display the chosen function on a second line.

3. **General navigation**: use buttons with icons to navigate as follows:

Icon	Action
	Save & Calculate – Saves and calculates the data on the time sheet.
	Reset – Resets all changes.
	Notes – View, add and edit notes.
	Complete – Certifies that time sheet is complete and ready for supervisor to review and approve. This is done at the end of the pay period.
	Calculate Time sheet – Calculates any balance adjustments that may apply.
	Balances – Displays current leave balances up to the present day.

	Print – Prints the time sheet.

6. Errors/Warnings on Time Sheet

A list of validation rules have been set up by Payroll Services to ensure the correct entry of data. An error or a warning will appear on an employee's time sheet when there is information that needs to be reviewed, by the employee, supervisor, or payroll coordinator.

List of Warnings: a time sheet with a **warning can** still by marked as complete by the employee.

Warning Flag	Description
1	FMLA Exceed Planned Hours
C	Paid Leave Shift > Shift
G	Hours/Day > 12
K	< Hours/Week
O	Insufficient PTO
S	Insufficient Comp

List of Errors: a time sheet with an **error cannot** be marked as complete by the employee or approved by a supervisor until it is corrected by a supervisor or payroll coordinator before the end of the pay period.

Error flag	Description
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
H	Hours/Week > 70
I	Notes Required
J	Invalid Holiday
M	Hours Before Hire Date
P	Insufficient Sick
Q	Insufficient Vacation
R	Insufficient ESL

7. <u>Employee Tasks</u>

    1. **Viewing a time sheet**:

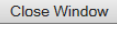   **Step 1** – under the **Employee Tasks** tab click on **Timesheet**.

          Step 2 – in the drop down menu select the pay period to view and click .

   When the timesheet is displayed you will see two sections:

The **Input Summary** will show time submitted for each day during the pay period and the **Worked Hours** will show hours/minutes worked by clocking in/out and **exception** hours recorded.

Adding notes: while viewing a time sheet, a user may click the icon in the tool bar to access a message box in order to communicate with their supervisor and/or Payroll Coordinator.

- Any previous notes will be displayed below the note entry box.
- Add a new note by typing in the box provided. Notes can be seen by the employee, their supervisor and payroll coordinator. PHI does not belong in the note section.
- To submit the note, click on the Submit Note button and the system will confirm by displaying the note below the text box.
- All notes entered are permanent. Click on the Close Window button when finished.

2. **Marking a time sheet as complete**: before the end of each pay period employees are required to mark their time sheet as complete, after which the supervisor can review and approve it.

> **Step 1** – See above steps to view, review, correct and add notes to the current pay period time sheet.

> **Step 2** – Once the time sheet is correct click on the [icon] button in the upper right corner of the screen and the system will display a message box. After reading the message, click the [OK] button and the status of the sheet will change from **Not Completed** to **Completed**. It can now be approved by your supervisor and then reviewed by a payroll coordinator.

Changing a Time Sheet:

If an employee marks a time sheet as **complete**, but later determines that changes are needed, the changes can be made. However, the steps to be taken are different depending on the scenario. Please refer to the very end of section 7.3 in the full version of the training guide at: http://tal.ouhsc.edu/Portals/1297/assets/documents/TAL%20Employee%20Manual%20v.2.pdf

3. **Submitting a Leave Request**: An employee can request leave in advance by following these steps:

> **Step 1** – Click on the **TimeOff Request** tab located on the **Employee Tasks** tab. The screen will list any previously submitted requests along with the submission tool:
>
> **NOTE**: the Type column has two drop down menus. Use **Leave Taken Scheduled** for all future dated leave requests. The second drop down is used when a FMLA event exists.
>
> The date of submission is displayed from the first day of the pay period.
>
> **Step 2** – Click on the buttons to enter the From and To dates for the leave period.
>
> **Step 3** – Select **Leave Taken Scheduled** in the **Type** drop down menu.
>
> **NOTE**: the TAL system cascades leave balances automatically in the following order:

Step 4 – Click the [Submit] button to display the leave detail screen.

Step 5 – Make adjustments, if needed.

Step 6 – Add any notes that are needed, following the same directions as Step 2, above.

Step 7 – Confirm the leave request by clicking the [Submit] button. Then, click the [Return to Time Off Summary] to display your pending request. **NOTE**: Clicking [Return to Time Off Summary] without first clicking [Submit] will take you back to the **TimeOff Request** page **without submitting** your request, and you will need to re-enter your request details.

Step 8 – Once the leave request is approved/denied by your supervisor, you will receive an email.

Viewing and Editing Leave Requests

In the **TimeOff Request** screen, click the date hyperlink for the appropriate request in the **From/To** column to view or edit a pending request. The request's details will open, where you can review, edit, and read/submit notes. **To edit an approved or denied request,** the employee must contact their supervisor.

4. To **View Balances,** click on the **Balances** tab in the employee task bar and the TAL system will display all balances by category. **NOTE:** the user can see more detailed information by clicking on the specific leave type under **Category**.

Balance Screen Definitions:

Column	Definition
Category	Type of leave.
Starting Balance	Beginning balance for the period.
Earned	Amount of leave earned in the pay period.
YTD Taken	Amount of time employee has used or has been 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.
Future Approve	Leave that has been approved by supervisor.

8. FMLA Requests:

Please see Section 8 of the full version of the training guide for further information on FMLA:

http://tal.ouhsc.edu/Portals/1297/assets/documents/TAL%20Employee%20Manual%20v.2.pdf

9. Messages and Emails

After successful sign in, the system will open on the **Messages** tab for all salaried employees. Be sure to read the message(s) because some of them require you to take action and some expire. Messages that will appear on this screen include:

- Leave requests
- Approved/denied leave
- FMLA request – approved/denied
- Time sheets ready to be reviewed
- Messages sent by Payroll Services

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

Action	System generates email to
Employee requests leave	Employee's supervisor
Supervisor approves/denies leave request	Employee
Supervisor/payroll coordinator changes employee's completed time sheet	Employee
FMLA request approved/denied	Employee

10. History

After clicking on the **History** tab and then **Timesheet** you can view any previous pay period timesheet. Choose the pay period you are interested in viewing and click . History time sheets are view only and cannot be changed.

11. <u>ACA Tracking</u>

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 Time sheet."
2. An Adjunct Professor or Graduate Teaching Assistant who is the instructor of record can use the Safe Harbor formula.
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.
   *** Please see Section 11 (page 38) of the full training manual for more complete instructions on entering ACA tracked hours at:

http://tal.ouhsc.edu/Portals/1297/assets/documents/TAL%20Employee%20Manual%20v.2.pdf

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 time sheet. The amount of **LWOP** entered should match the number of hours the employee was scheduled to work.

Contact Information:

Issue/Question	Who to Contact	Phone/Email Address
FMLA Issues/Questions	Human Resources	(405) 271-2194
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