HUMAN RESOURCES
The UNIVERSITY *of* OKLAHOMA

Time, Attendance and Leave (TAL)

Users Guide for Supervisors of Salaried Employees

1. <u>Overview</u>
   The 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 approve and review the time sheets.
   > Note: TAL related emails of notifications and updates will come from EcotimeAlert@hbscorp.com.

2. Supervisor's Responsibilities

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 time sheet entries. The supervisor is required to correct time entries by certain dates/times. 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. Time sheets approved by the supervisor will be reviewed by the payroll coordinator. The supervisor's review and approval of time entries on the time sheet in the TAL system will serve as his/her electronic signature.

3. General Navigation of TAL Website

1. **Signing in**: All employees who have access to a computer (on or off campus) 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 under the **Manager Tasks** tab (**Timesheet, Balances, TimeOff Approvals**, **Forecasted Pay, Delegate Authority, On Call,** or **Schedule**), will display the chosen function.

3. **General navigation**: Buttons with icons give the user quick access as follows:

Icon Example	Action
	Save and Calculate – Saves and calculates the data on the page.
	Reset – Resets all changes.
	Notes – View, add and edit notes.
	Complete – certifies time sheet is complete and ready for supervisor to review and approve. This is done at the end of the pay period.
	Remove Complete – Removes completion status from time sheet. Do this when changes are needed.
	Calculate Time Sheet – Calculates any balance adjustments that may apply.
	Balances – Displays current leave balances up to the present day.
	On Call – Add on call schedule assignment.
	Return – Returns to previous screen or selection.
	Print – Prints the time sheet.
	Un-approve All – Un-approve all items.
	Approve All – Approve all items.

4. Viewing Employee Time Sheets

Users can access the Timesheet Group from the display bar by selecting the **Manager Tasks** tab and then clicking on the **Employee Timesheets** tab. The employee time sheets section allows the user to view, approve and un-approve the time sheets of all employees in a Timesheet Group for a selected pay period. **NOTE**: Make sure the employees have marked their time sheets as completed before approving, if they have not, you need to remind them to do so.

To view employee summary, select the appropriate Timesheet Group and pay period for review and click the button. Use the **Previous Page** and **Next Page** buttons to scroll through the Hours Summary pages. You can search for a specific employee in the Last Name search bar.

By clicking on an employee's name you can review their time sheet, and then approve it by clicking . **NOTE**: click the button to return to the Hours Summary page after approving an employee's time sheet. **Do not use the browser's back button**.

From the **Hours Summary** page you can:

- approve selective employees' time sheets by clicking in the **APPROVE checkboxes** next to the employees' names, then click **SUBMIT** in the screen's lower right corner.

- to **approve all time sheets** at once, it is not necessary to click in the APPROVE checkboxes; simply **click** to approve all while on the Hours Summary page for the Timesheet Group.

- **un-approve all time sheets** in the Timesheet Group by **clicking** .

NOTE: Employees that are unable to complete their timesheet in TAL will still get paid at their salary rate. Supervisors should:

- always remind employees to complete time sheets.
- review and approve any time sheets not completed by the employee.
- make sure to check all their Timesheet Groups to see full lists of employees.

Hours Summary Screen Definitions:

Data Field	Definition
Employee Name	Displays employee name and FLSA status (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).
Complete	A blue check mark in the column indicates that the employee's time sheet 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 time sheet.
# Messages	Displays the number of errors and warnings. Normally, a time sheet cannot be approved until the errors are corrected. Warnings will not prevent a time sheet from being approved. **Please review all errors/warnings prior to approving time sheets.**
Approved	A blue check mark in this column means that this employee's time sheet has been reviewed and marked approved by the supervisor.
Action	Displays either the **approve** or **un-approve** checkbox based on available action.

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

Error Flag	Description
2 & 3	FMLA Related – please see full guide
6	Activity Required
B	Time In = Time Out
D	Employee Not Active
E	Employee Not Found
F	> 24 Hours/Day
I	Notes Required
J	Invalid Holiday
M	Hours Before Hire Date
P	Insufficient Sick
Q	Insufficient Vacation
R	Insufficient ESL

5. Editing Employee's Time Sheets

NOTE: Employees are allowed to review and edit their own time sheet.

Step 1 – Select an employee from the Hours Summary page under Employee Timesheets, click the name of the employee you want to select. The system will display that employee's detailed time sheet.

Step 2 – Make appropriate changes.

Step 3 – Save the changes by clicking on the button.

6. Editing a Time Sheet from a Prior Pay Period

Adjustments may be made in TAL for up to 2 past pay periods if an error is found that needs corrected. Once entered they will be reviewed by Payroll Services. Once approved, the adjustment will be added to the current pay period.

NOTE: If a change needs to be made further back than 2 pay periods or the adjustment crosses a calendar year, contact Payroll Services at (405) 271-2055.

Step 1 – Select an employee's time sheet: Follow steps above to edit an employee's time sheet. Make sure the correct historical pay period is selected.

Step 2 – Make appropriate adjustments: Make the changes needed to the time sheet. (i.e., if an employee's incorrect time sheet shows 8 hours and they only worked 6, change the 8 to a 6 **and save the change**.)

7. Viewing Employee Balances

    Under Manager Tasks, click Employee Balances and the system will display an employee's future approved leave requests and accrual balances by category.

Balance Screen:

Column	Definition
Category	**Type of leave – click here to view balance details**.
Starting Balance	Beginning balance for the period.
Earned	Amount of leave earned in the year.
YTD 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
Approved Leave Balance	Leave that has been approved by supervisor but has not yet processed on the time sheet.

**NOTE**: the TAL system cascades leave balances automatically in the following order:

Banked holiday → Comp time → PTO → Extended Sick Leave → Leave without Pay

8. Leave Requests

       Supervisors are responsible for reviewing and approving or denying leave requests.

Reviewing Leave Requests:

Step 1 – to access a leave request the user can select **Manager Tasks**, then **TimeOff Approvals**. Select the **Timesheet Group** using the dropdown menu and click [go]. Click on the date hyperlink for the request and you will be able to view the details.

Step 2 – click [Submit] and then the [Return to Timesheet Group] button.

Step 3 – to **approve a leave request** put a check in the box next to [✓ Approve] in the action column and click [Submit].

Step 4 - to deny a leave request put a check in the box next to [✓ Deny] and click [Submit].

NOTE: employees will not be able to edit an approved or denied leave request. They will also not be able to submit a new leave request containing a date that overlaps with any previously approved or denied requests. The supervisor must change the previous request to **PEND** status and the employee will have to edit the original request.

To change a leave request status to pending put a check in the box next to [✓ Pend] in the action column and click [Submit].

NOTE: Even after approval/denial the Time Off requests will remain on the TimeOff Approvals tab for one rolling month. Future approvals no longer show on the Approvals tab but can be found using the calendar function.

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 can use this to find TimeOff requests that no longer appear on the Approvals tab.

- Clicking on dates in blue will show the name of the employee who has requested leave for those dates and show Leave Cascading (LC) and either Approved (A), Denied (D), or Pending (P).

9. Delegating Authority

Supervisors have the ability to delegate authority to another individual with a similar level of authority or higher to review and approve leave requests and time sheets for their direct reports. Steps for delegating Supervisor duties will be available in the next version of the manual.

10. Messages and Emails

After successfully signing into the TAL system, it will display your informational Messages screen. Be sure to read the message(s) and take action when needed because some messages will expire. **Keep in mind that there may be notifications below the table, such as information about leave requests and time sheets.**

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

9. <u>History</u>

Following these steps the system will allow users to review time sheets that have already been sent to Payroll Services:

Step 1 – to review a history time sheet, click on the **history** tab and the **Timesheet Group**. Select the Timesheet Group desired in the drop down menu as well as the pay period and click .

Step 2 – click on the name of the employee you would like to review.

For complete information on FMLA and ACA tracking, please refer to pages 29-35 of the full manual at:

http://tal.ouhsc.edu/Portals/1297/assets/documents/TALSupervisorPCManualv.4.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. 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