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

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

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

2 Employee’s Responsibility

1. Hourly employees will enter time by using either the web clock or the wall clock. Salaried employees will only need to enter leave using the TAL website (www.tal.ouhsc.edu).

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 or payroll coordinator of any edits and/or 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 the time sheet to be reviewed and approved by the employee’s designated supervisor and payroll coordinator. Employees without computer access will have an alternate procedure outlined by the department.

NOTE: Hourly employees that do not have access to the TAL system (due to not having computer access or not being on the OUHSC network) will be asked by their department to use a paper time sheet to log hours. The paper time sheet can be found on the TAL Resources page at www.tal.ouhsc.edu under Paper Time Sheet (Hourly only). Note that supervisors must enter this time in TAL, employees with computer access off the campus network can approve the time sheet in TAL, otherwise they can sign and approve the paper time sheet.

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 time sheet to track ACA (Affordable Care Act) hours. The paper time sheet for tracking ACA hours can be found on the TAL Resources page at www.tal.ouhsc.edu under Paper Time Sheet for ACA Hours Tracking.
NOTE: Temporary employees will use the TAL system to record time worked. If they do not have access to the TAL system, they may utilize a paper time sheet 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.

3 Signing into a Wall Clock (Hourly Employees Only)

The wall clock is a touchscreen device mounted on the wall that communicates with the TAL system. All functions can be done by touching the appropriate button on the screen with your finger.

NOTE: An hourly employee must use the same method to clock out as they used to clock in. (Example: The TAL system will not recognize a clock out punch on the web clock if the clock in punch was done on a wall clock, and vice-versa.) Employees may choose to clock in and clock out on two or more wall clocks throughout any given day without any errors.

Step 1 – Sign In: Swipe the black strip of your OUHSC OneCard (with the picture side up) along the bottom slot of the wall clock (skip to step 3). If you do not have your OUHSC OneCard, touch the Keypad button (see step 2). Swiping your badge to sign in is the faster and preferred way to use a wall clock.

Step 2 – Enter ID: If you do not have your OneCard, you may enter your OUHSC employee ID (six-digit HR employee number) by touching the numbers on the keypad. If an incorrect number is entered, it can be corrected by using the arrow. Note: your OUHSC employee ID can be found on your OneCard or by asking your payroll coordinator. Confirm ID by touching the OK button.
Step 3 – Clock In/Out: This screen will have your name, a message, a list of time that has been entered on the terminal, and the following buttons: In, Out, Exit, and More. Definitions of each button on the wall clock are below.

Wall clock button definitions:

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

4 Signing into the Web Clock (Hourly Employees Only)

Hourly employees with web access will utilize the web clock to clock in and clock out daily via [www.tal.ouhsc.edu](http://www.tal.ouhsc.edu).

**NOTE:** The TAL system is best viewed in Internet Explorer in compatibility mode. To do this, open Internet Explorer and navigate to Tools > Compatibility View Settings > Add this website: ecotimebyhbs.com, click Add and Close.

**NOTE:** An hourly employee must use the same method to clock out as they used to clock in. (Example: The TAL system will not recognize a clock out punch on the web clock if the clock in punch was done on a wall clock, and vice-versa.) Employees may choose to clock in and clock out on two or more wall clocks throughout any given day without any errors.

**NOTE:** The web clock link CANNOT be accessed outside of the OUHSC network.
Step 1 – Accessing the web clock: Go to www.tal.ouhsc.edu and click the Web Clock link.

Step 2 – Enter ID and password: Enter your OUHSC network ID and password, click Log On or press enter. If you do not know your OUHSC network ID and/or password, contact the IT Service Desk at (405) 271-2203.

Step 3 – Clock In/Out: This screen will display the current date and time, an In or Out button (depending on the last action performed), and the ability to view punch history. After an employee clicks the In or Out button, the system automatically times out after 10 seconds if no further action is taken.

NOTE: 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.
5 Standardized Patients

Standardized Patients will access TAL using the Web Clock link on www.tal.ouhsc.edu. Standardized Patients also have the ability to utilize the wall clock.

Wall Clock Instructions

**Step 1 – Sign In:** Swipe the black strip of your OUHSC OneCard (with the picture side up) along the bottom slot of the wall clock (skip to step 3). If you do not have your OUHSC OneCard, touch the Keypad button (see step 2). Swiping your badge to sign in is the faster and preferred way to use a wall clock.

**Step 2 – Enter ID:** If you do not have your OneCard, you may enter your OUHSC employee ID (six-digit HR employee number) by touching the numbers on the keypad. If an incorrect number is entered, it can be corrected by using the arrow. **Note:** your OUHSC employee ID can be found on your OneCard or by asking your payroll coordinator. Confirm ID by touching the OK button.

**Step 3 – Home Screen:** This screen will have your name, a message, a list of time that has been entered on the terminal, and the following buttons: In, Out, Exit, and More. Do not use the In button to clock in. See the next step.

**Step 4 – More:** Standardized Patients will ONLY use the More button when clocking in. Do not clock in on the home screen. The More button will show In With, Transfer, and In Call Back.

**Step 5 – In With:** This button will allow the Standardized Patient to select the correct pay code from a list and then click OK. The Transfer button will allow the user to transfer from one pay code to another without having to clock out. Employees also have the option to push the Back button and Cancel button.

**NOTE:** Wall Clocks and Web Clocks will only show pay codes specific to the Standardized Patient’s campus.

Web Clock Instructions

**Step 1 – Access the web clock:** Go to www.tal.ouhsc.edu and click the Web Clock link.

**Step 2 – Enter ID and password:** Enter your OUHSC network ID and password, click Log On or press enter. If you do not know your OUHSC network ID and/or password, contact the IT Service Desk at (405) 271-2203.
Step 3 – Clock In/Out: This screen will display the current date and time, an **In** or **Out** button (depending on the last action performed), and the ability to view punch history. After an employee clicks the **In** or **Out** button, the system automatically times out after 10 seconds if no further action is taken.

**Friday, March 06, 2015 4:51:20 PM**

[In] [Called In]

[Date: 03/06/2015] [Retriece Data]

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

NOTE: Wall Clocks and Web Clocks will only show pay codes specific to the Standardized Patient’s campus.
6 General Navigation of TAL Website

This section outlines the navigation of the screens available to employees using the TAL Website.

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

NOTE: The TAL webpage is available on and off campus to hourly and salaried employees. The Web Clock is the only functionality not available off campus.

6.2 Menu Bar

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

Employees have access to the tasks listed in the screenshot below: Timesheet, Web Clock (for hourly employees only), Balances, TimeOff Request, and FMLA Request.
6.3 General Navigation: Buttons

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

<table>
<thead>
<tr>
<th>Icon</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Save &amp; Calculate" /></td>
<td>Save &amp; Calculate – Saves and calculates the data on the time sheet.</td>
</tr>
<tr>
<td><img src="image" alt="Reset" /></td>
<td>Reset – Resets all changes.</td>
</tr>
<tr>
<td><img src="image" alt="Notes" /></td>
<td>Notes – View, add and edit notes.</td>
</tr>
<tr>
<td><img src="image" alt="Complete" /></td>
<td>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.</td>
</tr>
<tr>
<td><img src="image" alt="Calculate Time sheet" /></td>
<td>Calculate Time sheet – Calculates any balance adjustments that may apply.</td>
</tr>
<tr>
<td><img src="image" alt="Balances" /></td>
<td>Balances – Displays current leave balances up to the present day.</td>
</tr>
<tr>
<td><img src="image" alt="Print" /></td>
<td>Print – Prints the time sheet.</td>
</tr>
</tbody>
</table>

6.4 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. The information can be reviewed by the employee, supervisor, or payroll coordinator. Hourly employees have read-only access to their time sheet.

**NOTE:** A time sheet with a warning can still be marked as complete by the employee; however, 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.

**NOTE:** Warnings/Errors can be seen on the time sheet as an icon next to the day in which they occur.
List of Warnings

<table>
<thead>
<tr>
<th>Error Flag</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>FMLA Exceed Planned Hours</td>
</tr>
<tr>
<td>C</td>
<td>Paid Leave Shift &gt; Shift</td>
</tr>
<tr>
<td>G</td>
<td>Hours/Day &gt; 12</td>
</tr>
<tr>
<td>K</td>
<td>&lt; Hours/Week</td>
</tr>
<tr>
<td>O</td>
<td>Insufficient PTO</td>
</tr>
<tr>
<td>S</td>
<td>Insufficient Comp</td>
</tr>
</tbody>
</table>

List of Errors

<table>
<thead>
<tr>
<th>Data Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>FMLA Exceed Yearly Hours</td>
</tr>
<tr>
<td>3</td>
<td>FMLA Outside of Interval</td>
</tr>
<tr>
<td>6</td>
<td>Activity Required</td>
</tr>
<tr>
<td>B</td>
<td>Time In = Time Out</td>
</tr>
<tr>
<td>D</td>
<td>Employee Not Active</td>
</tr>
<tr>
<td>E</td>
<td>Employee Not Found</td>
</tr>
<tr>
<td>F</td>
<td>&gt; 24 Hours/Day</td>
</tr>
<tr>
<td>H</td>
<td>Hours/Week &gt; 70</td>
</tr>
<tr>
<td>I</td>
<td>Notes Required</td>
</tr>
<tr>
<td>J</td>
<td>Invalid Holiday</td>
</tr>
<tr>
<td>M</td>
<td>Hours Before Hire Date</td>
</tr>
<tr>
<td>P</td>
<td>Insufficient Sick</td>
</tr>
<tr>
<td>Q</td>
<td>Insufficient Vacation</td>
</tr>
<tr>
<td>R</td>
<td>Insufficient ESL</td>
</tr>
</tbody>
</table>

7 Employee Tasks

Time sheet and web clock options will differ for hourly and salaried employees.

7.1 Correcting time sheet entries as an Exempt Employee

The following steps are used to edit an exempt employee’s time sheet. The time sheet for exempt employees can be found under the Employee Tasks tab.

NOTE: Exempt employees are allowed to review and edit their own time sheet. Exempt employees will only record exception time on their time sheet. Hourly employees will need to contact their supervisor to correct their time sheet.
Step 1 – Select pay period: Select the pay period for the time sheet you need to edit by using the drop down menu and click.

Step 2 – Add exception time: Select the type of exception time from the drop down menu under Hours Type. Input the number of hours for the exception time on the day in which it occurred.

Step 3 – Save the changes: Click on the button. The system will now display the employee’s updated time sheet.

7.2 Time Sheets for Hourly Employees

An hourly employee can review time sheets, add notes, and mark time sheets as complete on the TAL website; he/she cannot make edits to leave or time on the TAL website. The system logs the employee’s hours on the time sheet when the employee clocks in/out via web clock and/or wall clock. Exception time is logged on the time sheet by an approved TimeOff Request or by the assigned supervisor.

Viewing a Time Sheet

Step 1 – Access the Time Sheet: Click Timesheet under the Employee Tasks tab.

Step 2 – Select pay period: Select the pay period for the time sheet you wish to view by using the drop down menu and click.
The user’s time sheet will be displayed. A typical time sheet has two sections: input summary and worked hours, as described below.

**Input Summary:**

This section shows a summary of time submitted for each day during the pay period.

**NOTE:** The Worked row shows the hours/minutes that an employee worked by clocking in/out via the web clock and/or wall clock for that particular day.

**NOTE:** The Exceptions row shows the exception hours recorded for an employee on that particular day. Examples of exception time are Leave Taken Scheduled, Leave Taken Unscheduled, Admin Leave, etc.

<table>
<thead>
<tr>
<th>Pay Period Summary</th>
<th>Hide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours</td>
<td></td>
</tr>
<tr>
<td>Sun 04/05</td>
<td>Mon 04/06</td>
</tr>
<tr>
<td>Worked</td>
<td>0.00</td>
</tr>
<tr>
<td>Exceptions</td>
<td>0.00</td>
</tr>
<tr>
<td>Totals:</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Worked Hours:**

This section displays the actual time recorded from the web clock and/or wall clock. The system will display the following screen:

<table>
<thead>
<tr>
<th>Worked Hours on Sunday 04/05/15</th>
<th>Show Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time In/Out</td>
<td>Hours Type</td>
</tr>
<tr>
<td>Total: 0</td>
<td>0.00</td>
</tr>
</tbody>
</table>
Adding Notes to a Time Sheet:
The user has the ability to add notes to a time sheet to communicate with the Supervisor and/or Payroll Coordinator. To enter notes, follow the steps below:

**Step 1 – Click the note icon:** To add a note while viewing a time sheet, click on the tool bar. A screen is then displayed which allows the user to add a note as shown below:

![Note Entry Screen]

If there are previous notes, they are displayed below the note entry box.

**Step 2 – Type a note:** To add a note, type the text in the box provided. Notes can be seen by the employee, their Supervisor and Payroll Coordinator. Protected Health Information does not belong in the notes section.

**Step 3 – Submit the note:** To submit the note, click on the **Submit Note** button. The system confirms submission of the note by displaying it below the text box:

<table>
<thead>
<tr>
<th>Entered By/Date</th>
<th>Notes</th>
</tr>
</thead>
</table>

**Step 4 – Close the note window:** All notes entered are permanent. Click on the **Close Window** button when finished.

**Compensatory Time Functionality**
Employees who are eligible for overtime may choose to bank overtime hours and use them as leave hours at another time; this would take the place of receiving overtime pay, which is the default procedure. Employees should discuss these options with their supervisor. If approved, the supervisor must change the employee in the TAL system to a compensatory time-earning employee.
**Marking a Time Sheet as Complete**

Employees are required to mark time sheets as complete before the end of a pay period. Once a time sheet is marked complete, the supervisor can review and approve it. To complete a time sheet follow the procedure:

**Step 1 – Review time sheet:** See the steps above to view time sheet, look over hours, and add notes if needed.

**Step 2 – Mark time sheet as complete:** If the time sheet is correct after reviewing it, click in the upper right hand corner of the screen. The system will display the following message:

![Message from webpage](image)

After reading the message, click the **OK** button. The status of the time sheet goes from **Not Completed** to **Completed** and is now available to be approved by your supervisor and then reviewed by a payroll coordinator.

**NOTE:** You must inform your supervisor or payroll coordinator of any edits and/or corrections before the end of the pay period or as soon as possible.
7.3 Time Sheets for Salaried Employees

Salaried employees do not enter regular work hours and do not clock in/out via web clocks or wall clocks. Salaried employees working more than .75 FTE only need to add/edit/view exception time in the TAL system before submitting time sheets. Once submitted, the time sheets will be routed and approved by the assigned supervisor.

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

Exception Time Reporting:

Step 1 – Access the time sheet: Click Timesheet under the Employee Tasks tab, select the appropriate pay period from the drop down menu and click Go.

Step 2 – Select the Hours Type: Use the drop down list under Hours Type to select the type of leave used.

Step 3 – Enter exception time: Enter the hours in the appropriate day column. Hours can be entered in quarter hour increments.

Step 4 – Save exception time: To save the exceptions, click on the task bar at the top of the time sheet screen.

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

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

Adding Time Sheet Notes:

The user has the ability to add notes to a time sheet to communicate with the Supervisor and/or Payroll Coordinator. To enter notes, follow the steps below:

Step 1 – Click the note icon: To add a note while viewing a time sheet, click on the tool bar. A screen is then displayed which allows the user to add a note as shown below:
If there are previous notes, they are displayed below the note entry box.

**Step 2 – Type a note:** To add a note, type the text in the box provided. Notes can be seen by the employee, their Supervisor and Payroll Coordinator. Protected Health Information does not belong in the notes section.

**Step 3 – Submit the note:** To submit the note, click on the **Submit Note** button. The system confirms submission of the note by displaying it below the text box:

<table>
<thead>
<tr>
<th>Entered By/Date</th>
<th>Notes</th>
</tr>
</thead>
</table>

**Step 4 – Close the note window:** All notes entered are permanent. Click on the **Close Window** button when finished.

**Marking a Time Sheet Complete**

Employees are required to mark time sheets as complete before the end of a pay period. Once a time sheet is marked complete, the supervisor can review and approve it. To complete a time sheet follow the procedure:

**Step 1 – Review time sheet:** See the steps above to view time sheet, add/edit exception time as needed, and add notes if needed.

**Step 2 – Mark time sheet as complete:** If the time sheet is correct after reviewing it, click in the upper right hand corner of the screen. The system will display the following message:
After reading the message, click the **OK** button. The status of the timesheet goes from **Not Completed** to **Completed** and is now available to be approved by the supervisor.

### Changing a Time Sheet

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

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

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

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

Submitting a Leave Request

An employee can request leave in advance for various reasons. When supervisors approve leave requests, the hours will automatically populate to the time sheet once that pay period is current. When the requested leave period is in the current pay period, the approved leave request automatically populates on the current time sheet.

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

![Submit Time Off Request](image)

**NOTE:** The Type column has two drop downs menus. Use Leave Taken Scheduled for all future dated leave requests. The second drop down is used when an FMLA event exists.

The date of submission is displayed from the first day of the pay period.

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

**NOTE:** To select a partial day of leave, select the day for both the TO and FROM. You will be able to adjust the hours on the screen that follows.

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

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

Step 5 – Make adjustments: The display allows the user to make changes to the request if needed. If two different leave types have been selected, each box can be manually adjusted. The system defaults hours based on the employees FTE, but employees can adjust as needed on a day-to-day basis. If a partial day is requested, the system will not show the hours the employee will be out (i.e., 8am-noon) but the employee can put the number of hours needed add the time to the notes section of the request (see below).

NOTE: If an employee’s schedule is on a weekend, the employee will need to manually move hours to weekend days. The system assumes Monday-Friday.

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

Step 7 – Complete request: Confirm the leave request by clicking on the Submit button. Next, click on Return to Time Off Summary where it will display your pending request as seen below:
The display indicates that the leave request is pending approval and can be deleted if necessary prior to supervisor approval.

**NOTE:** The TAL system will show that any request or report was submitted in **Eastern Time**. Subtract one hour for Central time.

**NOTE:** Clicking without first clicking 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 – Approval:** The leave request will route to the employee’s supervisor for approval. The supervisor will receive notification from the TAL system that a request is awaiting approval. Emails to the supervisor may be delayed as much as an hour. Once the leave request is approved or denied, the employee will receive notification via email and on the **Messages** tab in the TAL system.

**Viewing and Editing Leave Requests**

The user can view and edit submitted leave requests on the **TimeOff Request** screen, which details current and outstanding requests.

To **view or edit a pending request**, click the date hyperlink for the appropriate request on the **From/To** column of the **Time Off Requests** table. The request’s details will open, where you can review, edit, and read/submit notes.

To **edit an approved or denied request**, the employee needs to contact their supervisor.

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

### 7.5 Balances

**Viewing Balances**

The balances section allows the user to view his/her various leave balances. To view balances, click on the **Balances** tab located on the **Employee Tasks** bar. The TAL system displays all balances by category.
NOTE: User can see more detailed information by clicking on the specific leave type under Category. Also, the categories shown above will vary depending on the employee.

The user may also access balances from a time sheet by clicking the icon from the toolbar.

**Balance Screen Definitions:**

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

7.6 On Call

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

**Step 1 – In Call Back on Wall Clock or Web Clock:** When an employee is put on call by their supervisor and they are called back in to work, they will use the Wall Clock or the Web Clock to record time worked.
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 which is found under the **More** section of the Wall Clock.

The TAL system will then record these hours as Call Back Worked (CBW) and show this time on the time sheet.

**NOTE:** Be sure to use the Called In or In Call Back buttons and not just *In* when you are On Call. If the *In* button is used, the employee will need to let the supervisor know.

**NOTE:** Please check with your supervisor on departmental specifics on recording on call hours.
### 7.7 Bank Holiday

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

#### Bank Holiday – Salary Employees

**Step 1 – Access Timesheet to record hours worked:** Click on the Timesheet tab located on the Employee Tasks tab. The TAL system records OUHSC defined holidays.

**Step 2 – Changing Holiday Pay:** The TAL system records the Holiday Pay hours based on your FTE. You will need to offset the hours worked with the Holiday Pay hours shown on your time sheet. For example, if your Holiday Pay hours show 8.00 and you were scheduled to work on the holiday for 6.00 hours, then you would put the Holiday Pay hours as 2.00. Click ![Click](https://example.com).

This will put 6 hours toward your Banked Holiday, but still pay you for 8.00 Holiday Pay hours on your paycheck.
Step 3 – Checking Bank Holiday balance: To view balances, click on the Balances tab located on the Employee Tasks bar.

NOTE: Notice that the TAL system states that the Current Balance for Holiday is 6.00, which is what the employee worked that day. Cascading rules will apply when using Holiday balances.
Bank Holiday –Hourly Employees

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

Step 1 –Clocking In/Out on an University defined Holiday: Hourly employees that are scheduled to work on University defined holidays will clock in and out for hours worked. The TAL system will automatically move any hours worked to the Holiday bucket on the Balances tab.

For example, if your Holiday Pay hours show 8.00 and you were scheduled to work on the holiday for 4.00 hours, then you would clock in/out for 4.00 hours. This will put 4.00 hours toward your Banked Holiday, but still pay you for 8.00 Holiday Pay hours on your paycheck.
Step 2 – Checking Bank Holiday balance: To view balances, click on the Balances tab located on the Employee Tasks bar.

NOTE: Notice that the TAL system states that the Current Balance for Holiday is 4.00, which is what the employee worked that day. Cascading rules will apply when using Holiday balances.

8 FMLA Requests

The FMLA section of the system allows employees to request FMLA, add FMLA time to timesheets, and track FMLA balances.

Once an employee is logged into the TAL system, the first step is to go to the Employee Tasks tab and select the FMLA Request tab as shown below:

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

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

The FMLA page has three sections.

The first section allows the employee to make an FMLA request:

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

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

**Step 1** - Once an employee is in the FMLA Request page, they can make the request by first selecting an FMLA event in the Reason Code dropdown box:

![Reason Code Dropdown]

**Step 2** – Next, the employee will need to enter a start date for the FMLA event:

![Start Date Calendar]

**Step 3** – The employee will then need to enter an end date for the FMLA event:
Note: The employee has the option to choose an intermittent FMLA event by checking the intermittent box:

**Step 4** – Finally, the employee will need to click the **button.

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

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

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

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

Your FMLA request for FMLA Employee Health Condition was received on 05/06/2015.
Your FMLA Representatives are: Jessica Rodriguez, jessica.a.rodriguez@ouhsc.edu
Please complete and return the required forms by the due dates.

In addition, a message will alert the Payroll Coordinator and Leave Coordinator that an employee has requested FMLA. The Leave Coordinator will process and send all FMLA paperwork via email, ensuring that the appropriate Payroll Coordinator is included in all correspondence.

Paperwork Due:

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

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

Designation Made:

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

FMLA Leave Request Submitted:

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

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

This should alert the employee or 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 time sheets. Some messages will expire after a set amount of time and/or once an issue has been resolved.

8.2 Viewing FMLA Leave on Timesheets

Continuous FMLA Leave
FMLA on an Exempt Timesheet:
When an employee has been approved for continuous FMLA leave, the Leave Coordinator will submit an approved leave request for that employee. Those FMLA hours will automatically transfer to the employee’s timesheet as shown below:
The employee will need to ensure that the actual FMLA leave is correct on the timesheet. Any FMLA leave not taken should be deleted from the timesheet.

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

FMLA on an Hourly Timesheet:
When an employee has been approved for continuous FMLA leave, the Leave Coordinator will submit an approved leave request for that employee. Those FMLA hours will automatically transfer to the employee’s timesheet as shown below:
The employee will need to ensure that an employee’s actual FMLA leave is correct on the timesheet. Any FMLA leave not taken should be deleted from the timesheet. The employee will need to notify their supervisor or payroll coordinator immediately to remove unnecessary FMLA for a timesheet.

**Intermittent FMLA Leave**
The following steps are used to edit an exempt employee’s time sheet.

**NOTE:** Exempt employees are allowed to review and edit their own time sheet.

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

The system will display the employee’s detailed time sheet:
Step 3 – Make the changes: Make the appropriate changes.
Note: Select Leave Taken Scheduled for all FMLA events. If the employee has an approved event, a dropdown box will appear allowing the appropriate event to be selected.

Step 4 – Save the changes: To save the changes, click on the button.

NOTE: Hourly employees are not able to enter FMLA intermittent leave to their timesheet and will need to notify their supervisor or payroll coordinator immediately.

8.3 Errors/Warnings

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

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

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

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

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

8.4 Balances

**Viewing Employee FMLA Balances**

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

The FMLA balance screen will display the following rows:

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

**FMLA Year** – This displays the beginning and ending dates for the FMLA year.
The FMLA balance screen will display the following columns:

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

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

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

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

9 **Messages and Emails**

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

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

```
Welcome to the TAL System!

Please follow these steps if you have a question about using the TAL system:
1. Refer to the user’s manuals and information available on the TAL website (www.tal.ouhsc.edu).
2. Contact your departmental payroll coordinator.
3. Contact Payroll Services (405) 271-2055 or by email Payroll-Services@ouhsc.edu.
```

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

Messages that appear on this screen will include:

- Leave request
- 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:

<table>
<thead>
<tr>
<th>Action</th>
<th>System generates email to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee requests leave</td>
<td>Employee’s supervisor</td>
</tr>
<tr>
<td>Supervisor approves/denies leave request</td>
<td>Employee</td>
</tr>
<tr>
<td>Supervisor/payroll coordinator changes employee’s completed time sheet</td>
<td>Employee</td>
</tr>
<tr>
<td>FMLA request approved/denied</td>
<td>Employee</td>
</tr>
</tbody>
</table>

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

10 History

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

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

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

11 ACA Tracking

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

There are several options for the employee, supervisor, or payroll coordinator to enter hours:
1. Use the “Duration Time sheet” shown below to track actual hours. Enter the total hours worked, not the start and end times. This time sheet 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 time sheet for exempt employees that are less than .75 FTE is shown below.
The drop menus in the bottom box list the different types of hours worked and leave taken that can be put on the time sheet.

Employees or the supervisor or payroll coordinator must use **Regular ACA** to record hours worked for the purposes of ACA reporting. All other items in the menu are forms of leave that should be used as defined. These hours do not affect pay and are recorded for the purposes of ACA compliance.
An employee that worked 6 hours on Monday would choose “Regular ACA” under **Hours Type** and enter a 6 in the Monday column, as shown below.

![Hours Type Table]

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

![Pay Period Summary Table]

![Week 1: Hours Table]

C - Worked & Paid Leave > Shift (Warning)
NOTE: If the number of hours in a given day does not match the per day FTE value, a warning will appear, as shown in the following screenshot. 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 time sheet. The amount of **LWOP** entered should match the number of hours the employee was scheduled to work.

### 12 Contact Information

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