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

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

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 time sheet entries. The supervisor is required to correct time entries by certain dates/times, which are designated by the departmental payroll coordinator. Refer to the payroll calendar for dates and deadlines.
3. Approve and review leave requests as received.
4. Submit prior pay period corrections as soon as known.
5. Enter/review/approve compensatory time elections for employees who request it.
6. Answer employee questions about the TAL system as well as possible before referring an employee to Payroll Services.
7. 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 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. Edit and correct time sheet entries as needed and review time sheet entries before payroll deadline. Refer to the payroll calendar for dates and deadlines.
3. Submit and/or approve prior pay period corrections as soon as known.
4. Answer employee questions about the TAL system as well as possible before referring an employee to Payroll Services.
5. The payroll coordinator is the final time sheet reviewer. His/her review of the employee’s time sheet entries and the supervisor’s approval will serve as the payroll coordinator’s electronic signature.
NOTE: 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 time sheet. The paper time sheet can be found on the TAL Resources page at www.tal.ouhsc.edu under Paper Time Sheet (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 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.

The supervisor or Payroll Coordinator must input all hours tracked on a paper time sheet 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 time sheet, but if they have access to a computer they can approve the time sheet in TAL after the supervisor/Payroll Coordinator inputs the time into the time sheet in TAL on their behalf.

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.

4   TAL Website General Navigation

This section presents the screens available to employees using the TAL website.

4.1 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 – Enter 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.

The above screenshot shows the Menu Bar. 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 time sheet, TimeOff requests, etc. When employees sign in who do not have supervisor/payroll coordinator credentials, the TAL system will present a different menu bar limited to employee functions only. This navigation is outlined in the Employee Manual. Those with Supervisor or Payroll Coordinator access 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.

<table>
<thead>
<tr>
<th>Icon Example</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Save &amp; Calculate – Saves and calculates the data on the page.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Reset – Resets all changes.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Notes – View, add and edit notes.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></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="Icon" /></td>
<td>Remove Complete – Removes completion status from time sheet. Do this when changes are needed.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Calculate Time Sheet – Calculates any balance adjustments that may apply.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Balances – Displays current leave balances up to the present day.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>On Call – Add on call schedule assignment.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Return – Returns to previous screen or selection.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Print – Prints the time sheet.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Unapprove All – Unapprove all items.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Approve All – Approve all items.</td>
</tr>
</tbody>
</table>
5 Supervisor & Payroll Coordinator Tasks

Definitions of Tabs on Manager Menu Bar:

<table>
<thead>
<tr>
<th>Tab</th>
<th>Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Tasks</td>
<td>See Employee TAL Manual for more information.</td>
</tr>
<tr>
<td>Manager Tasks</td>
<td>Employee Timesheets, Employee Balances, Time Off Approvals, Delegate Authority, FMLA Request, On Call, and Attendance.</td>
</tr>
<tr>
<td>Messages</td>
<td>Welcome screen with any messages for the user.</td>
</tr>
<tr>
<td>Employee Setup</td>
<td>Comp. Effective Dates and Payouts</td>
</tr>
<tr>
<td>History</td>
<td>Allows the user to review time sheets and timesheet group history that have been approved and paid.</td>
</tr>
<tr>
<td>Reports</td>
<td>Allows the user to review employee info, output and time sheet reports</td>
</tr>
<tr>
<td>Log Off</td>
<td>Allows the user to log off the system when finished</td>
</tr>
</tbody>
</table>

5.1 Employee Time Sheets

Viewing Employee Time Sheets

The employee time sheets section allows the user to view, approve and unapprove 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 as a supervisor. Employees that have not approved their time sheet 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.

The user can access the Timesheet Group from the display bar by selecting the Manager Tasks tab and then click on the Employee Timesheets tab.

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

To review an employee’s time sheet, click on the employee’s name. You can then approve this employee’s time sheet by clicking [Approve].

**NOTE**: To return to the Hours Summary page after approving an employee’s time sheet, click [Page]. Do not use the browser’s back button.

To approve selective employees’ time sheets from the Hours Summary page, click in the APPROVE checkboxes next to the employees’ names, then click the SUBMIT button at the lower right corner of the screen, as shown below.

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

To unapprove all time sheets in the Timesheet Group click [Unapprove].
NOTE FOR SUPERVISOR: Employees that are not able to complete their timesheet in TAL will still get paid. All hourly employees will get paid for the hours recorded on the timesheet at the time it was approved. All salary employees will get paid at their salary rate. Supervisors should always remind employees to complete their time sheet. Supervisors should also review and approve any time sheets that have not been completed by the employee. Supervisors need to make sure to check all their Timesheet Groups to see the full list of employees.

Below is an example of Employee Timesheets. If an employee is not able to complete their time sheet, the supervisor will still review and approve the time sheet.

NOTE FOR PAYROLL COORDINATOR: The Payroll Coordinators responsibility is to review employee time sheets. If an employee has not completed their time sheet and the supervisor approved it, the payroll coordinator does not need to take further action. Payroll Coordinators need to make sure to check all their Timesheet Groups to see the full list of employees.
**Hours Summary Screen Definitions:**

<table>
<thead>
<tr>
<th>Data Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Name</td>
<td>Displays employee name and FLSA status (i.e., exempt/salaried vs. nonexempt/hourly).</td>
</tr>
<tr>
<td>Regular</td>
<td>Displays the number of regular hours worked.</td>
</tr>
<tr>
<td>Exception</td>
<td>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.</td>
</tr>
<tr>
<td>Total Hours</td>
<td>Displays the total hours that the employee entered (regular plus exception time).</td>
</tr>
<tr>
<td>OT Hours</td>
<td>Displays the number of overtime hours calculated.</td>
</tr>
<tr>
<td>Complete</td>
<td>A blue check mark in the column indicates that the employee’s time sheet is complete and ready to be approved by the supervisor.</td>
</tr>
<tr>
<td>Notes</td>
<td>A blue check mark in the Notes column indicates that a note has been attached to the time sheet.</td>
</tr>
<tr>
<td># Messages</td>
<td>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 sheet.</td>
</tr>
<tr>
<td>Approved</td>
<td>A blue check mark in the column means that this employee’s time sheet has been reviewed and marked approved by the supervisor.</td>
</tr>
<tr>
<td>Action</td>
<td>Displays either the approve or unapprove checkbox based on available action.</td>
</tr>
</tbody>
</table>

**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>
</tbody>
</table>
Editing an Exempt Employee’s Time Sheet

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. Employees will receive an email and a notification in TAL if the supervisor edits a time sheet that has already been completed by the employee. The employee will have to complete their time sheet again and re-route it to the supervisor for approval again.

Step 1 – Select an employee: From the Hours Summary page under Employee Timesheets, select an employee by clicking on the name.
The system will display the employee’s detailed time sheet:

![Time Sheet Image]

Step 2 – Make the changes: Make the appropriate changes.

Step 3 – Save the changes: To save the changes, click on the button.

**Entering Exception Time for an Hourly Employee**

Step 1 – Select an hourly employee’s time sheet: From the Hours Summary page under Employee Timesheets, select an hourly employee by clicking on the name.
Step 2 – The system will display the employee’s detailed time sheet.

![Pay Period Summary](image)

Step 3 – Access Exception Reporting Table: On the employee’s Pay Period Summary, click the date on which the employee had exception time. The data on the **Hours Worked** table will change according to the date selected. Click the **Show Exceptions** button on the **Hours Worked** table. The system will then display this table:

![Exception Time Table](image)

Step 4 – Make the changes: 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.

**NOTE:** The steps above are the same if an hourly employee needs to change a processed leave request, edit the exception time for the day the leave was requested.

**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.
NOTE: 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 time sheets and the Attendance screen to see when an employee missed a punch.

Step 1 – Select an hourly employee’s time sheet: From the Hours Summary page under Employee Timesheets, select an hourly employee by clicking on the name.

The system will display the employee’s detailed time sheet. There will be a warning/error icon next to the day on which the employee had an incorrect time punch. Click on that day to see the warning/error details under Message Descriptions on that days’ time sheet details.
Step 3 – Make the changes: Click the day on which the employee needs a time correction. 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.

Step 4 – Save the changes: To save the changes, click on the button. The system will show the employees updated time sheet and the error will be removed.

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.

NOTE: 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.

Editing a Time Sheet from a Prior Pay Period

If an error is found on a time sheet from a previously processed pay period, then adjustments may be made in TAL for up to 2 past pay periods. When adjustments are entered for a prior pay period, they will be reviewed and approved by Payroll Services. Once approved, the adjustment will be added to the current pay period and will have their own paylines when viewing in PeopleSoft.

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

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.)
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 follow FLSA guidelines. 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.

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) and the supervisor must change their status in TAL by following the steps below.

Step 1 – Access Comp Time Setup: Click on the Comp. Effective Dates tab located on the Employee Setup tab.

Step 2 – Select Employee Electing Comp Time: Search by Employee Name or Employee ID and select Retrieve Data. Select the hyperlink on the employee ID Number.

Step 3 – Select Comp Time Election Effective Dates: Select the start and end dates for the comp time election. Elections can be for a temporary date range or permanently. Comp time percent must be set to 100%. Select to save the record.
5.3 Employee Balances

**Viewing Employee Balances**

The user can view balances for any Timesheet Group that he/she has access to in the TAL system. Click **Employee Balances** under **Manager Tasks**. The TAL system displays an employee’s future approved leave requests and accrual balances by category.

**Balance Screen:**

<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 year.</td>
</tr>
<tr>
<td>YTD Taken</td>
<td>Amount of time employee has used or was 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>Approved Leave Balance</td>
<td>Leave that has been approved by supervisor but has not yet processed on the time sheet.</td>
</tr>
</tbody>
</table>

**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:
Step 1 – Viewing a balance detail: To view a balance detail, click on the leave type in the category column. The system will display a screen with the hours taken as well as other detailed information.

Step 2 – Return to summary screen: To return to the summary screen to display other groupings, click the Return To Summary Screen link at the top of the page.

NOTE: The TAL system cascades leave balances properly. The system will first check to see if an employee has any hours in the Banked 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.

5.4 Leave Requests

This section explains how to approve or deny leave that an employee has requested. 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 on this screen about any leave requests awaiting their approval. 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:

Step 1 – Accessing a leave request: The user can access leave requests from the menu bar by selecting Manager Tasks, then clicking TimeOff Approvals. Select the Timesheet Group using the dropdown menu and click as shown below:
The following screen will be displayed:

Clicking on the date hyperlink for the request will display the following screen:

Step 2 – Go back to department view to approve/deny: To approve or deny a request, you must be on the main department view screen. Click to return to the main page.

NOTE: Time Off Requests remain on the TimeOff Approvals tab for one rolling month, even after they are approved or denied. TimeOff Approvals for dates in the future that no longer show on the Approvals tab can be found using the calendar feature shown below.

Using the Calendar Function in TimeOff Approvals
A calendar will appear in the lower left screen when reviewing leave requests. Dates in blue represent days when other employees in that Timesheet Group have requested leave. Supervisors and Payroll Coordinators can use this to find TimeOff requests that no longer appear on the Approvals tab.

<table>
<thead>
<tr>
<th>March 2015</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sun</td>
<td>Mon</td>
</tr>
<tr>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td>15</td>
<td>16</td>
</tr>
<tr>
<td>22</td>
<td>23</td>
</tr>
<tr>
<td>29</td>
<td>30</td>
</tr>
</tbody>
</table>
Clicking on the dates in blue will show the name of the employee who has 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).

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Sun</th>
<th>Mon</th>
<th>Tue</th>
<th>Wed</th>
<th>Thu</th>
<th>Fri</th>
<th>Sat</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>LC 8.00 (P)</td>
<td>LC 8.00 (P)</td>
<td></td>
</tr>
</tbody>
</table>

Responding to Leave Requests

Select the employee leave request awaiting review. The following screen will display.

Step 1 – Approve a leave request: To approve a leave request, put a check in the box next to **Approve** in the action column.

Step 2 – Submit the approve leave request: To submit, click on the **Submit** button. The status will update to show the request has been approved. The employee will receive an email and a notification on the TAL Messages screen. This leave will populate on the employee’s time sheet for the corresponding pay period.

NOTE: An employee cannot edit a leave request once approved.
Denying a Leave Request:

Step 1 – Denying a leave request: To deny a leave request, put a check in the box next to **Deny** in the action column.

Step 2 – Submit the denied leave request: To submit, click on the **Submit** button. The status will update to show the request has been denied. The employee will receive an email and a notification on the TAL Messages screen.

**NOTE**: An employee cannot edit a denied request. 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:

Step 1 – Reversing a leave request: To reverse a leave request decision, put a check in the box next to **Pend** in the action column.

Step 2 – Submit the pended leave request: To submit, click on the **Submit** button. 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. To edit these requests for an hourly employee, refer to entering exception time for an employee.

5.5 Delegating Authority for Supervisors

Supervisors have the ability to delegate authority to another individual to review and approve leave requests and time sheets for the Supervisor’s direct reports. Supervisors should delegate authority for approving time sheets and leave requests to a person with a similar level of authority or higher.
In the event that authority is delegated to a sub-ordinate or other person without sufficient level of authority, activity reports showing time and leave approved should be provided to the proper authority to ensure that proper oversight is occurring. Failure to monitor time and leave in an appropriate manner can result in negative audit findings.

NOTE: Employees cannot delegate the completion of their own time sheet to another individual.

Step 1 – Delegating Authority: Click the Manager Tasks tab and then Delegate Authority.

Step 2 – Delegating authority to another supervisor or sub-ordinate: Delegation is done per Timesheet Group. Choose the correct Timesheet Group and click . The Delegate Authority Menu will open.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Give Authority To</td>
<td>This field will show you a list of individuals that are in the selected Timesheet Group. This can be peers, supervisors, or direct reports.</td>
</tr>
<tr>
<td>For TS Group</td>
<td>This field is the selected Timesheet Group.</td>
</tr>
<tr>
<td>Begins (mm/dd/yyyy)</td>
<td>The system defaults to today’s date. This date can be any date from today to any day in the future in which this delegation needs to be active.</td>
</tr>
<tr>
<td>Expires (mm/dd/yyyy)</td>
<td>The system defaults to 12/31/2099. This date can be any date in which this delegation needs to expire.</td>
</tr>
<tr>
<td>Group Access Level</td>
<td>This field is defaulted to Supervisor. Payroll Coordinator delegation is handled via a security form outside of the TAL system.</td>
</tr>
<tr>
<td>Action (Add Entry)</td>
<td>is used to Add the Delegated Authority to the Current Delegations table.</td>
</tr>
</tbody>
</table>
Step 3 – Add Entry: Once the correct fields are completed in the above table, click on Add Entry. This will then show Current Delegations on the Delegate Authority tab. If you need to remove the Current Delegations for any reason, you may click Delete.

5.6 Delegating Authority for Payroll Coordinators

Delegating Authority to Payroll Coordinators is currently being handled outside the TAL system through the PS-Security team. Primary Payroll Coordinator access was submitted and loaded into the TAL system.

We are working with our vendor to streamline the delegation/backup process for Payroll Coordinators. A form may be submitted identifying delegation/backup Payroll Coordinators to be loaded at a future date. This form can be found at [http://www.ouhsc.edu/financialservices/documents/Financial_Services/TALChangeForm.pdf](http://www.ouhsc.edu/financialservices/documents/Financial_Services/TALChangeForm.pdf)

**NOTE:** Going forward, all new Payroll Coordinators will need to attend Payroll Training before getting access to TAL.

Training information can be found at [https://apps.hr.ou.edu/ClassCalendar/Default.aspx](https://apps.hr.ou.edu/ClassCalendar/Default.aspx)

5.7 On Call

This section includes information on how to put employee’s *On Call* in the TAL system. The supervisor will need to put the employee *On Call* in the TAL system by using the Pager functionality on the time sheet in order for TAL system to include the *On Call* pay codes on the time sheet.

**Step 1 – Put employee On Call:** Click the Manger Tasks tab and then Employee Timesheets. Find the employee under the correct Timesheet Group and choose the correct Pay Period for which the employee will be put On Call. Click.
Step 2 – Check Pager: 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.
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.
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 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 .

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.

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.

5.9 Making Prior Pay Period Adjustments (Payroll Coordinator)

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, you will need to contact Payroll Services.

Step 1 – Correcting Prior Pay Period Timesheet: Click the History tab and then Timesheet Group.

Step 2 – Select correcting Pay Period and Timesheet Group: Select the correcting Pay Period and Timesheet Group in the Timesheet Group dropdown and click .

Step 3 – Select employee for adjustment: Select the employee’s time sheet that needs to be adjusted. Click the Create Adjustment button at the top left of the timesheet. This will open an adjustment time sheet (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 40 hours but it needs to be entered, the payroll coordinator would then enter 40 hours of leave taken unscheduled on the adjustment time sheet and click .
NOTE: The original time sheet will remain on the screen for reference. The Supervisor will need to review and approve the adjustment in order for it to be processed along with the next bi-weekly payroll. These must be approved by the time timesheets are locked at 5pm 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)

Supervisors 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.

Step 1 – Run Adjustment Status Report: Click the Reports tab and then navigate to the Adjustment Status report as shown below.
Step 2 – Select Report Parameters: Select Approval Status “Not Approved,” Processed Status “Not Processed,” and “Select All” for Timesheet Group, Employee, and Pay Period. (As shown below.) Click View Report.

Step 3 – Print the Adjustment Status Report. This report will display adjustments that have been entered in the system but have not been approved or processed.

Step 4 – Review Adjustment(s) From Adjustment Status Report. To review the adjustment detail, you will need to navigate directly to the employee’s timesheet. Click the History tab and then select the desired Timesheet Group from the report.
Step 5 – Select employee to review: Select the employee’s time sheet that needs to be reviewed. You will see this checkbox in the Action column: ☑ Approve. Click the employee’s name to view the original timesheet at the top, and the adjusted timesheet at the bottom.

Step 6 – Delete or deny adjustment: If the adjustment is incorrect, contact the payroll coordinator 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, which will delete the adjustment.

Step 7 – Approve adjustment: To approve an adjustment, you can either click at the top right of the screen, or navigate back to the pay period list of employees and click the box next to and then click.

6 Messages and Emails

After successfully signing in, the system will open with the following informational screen.
**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.

Messages that appear on the Messages 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</td>
<td>Employee</td>
</tr>
<tr>
<td>employee’s completed time sheet</td>
<td></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. 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.

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## History

Last Updated 4/6/2016
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.

**Reviewing an Employee’s History Time Sheet**

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

**Step 2 – Select an employee:** To select the employee’s name that is to be reviewed from the list, click on the name.

**NOTE:** History time sheets are read only and changes can only be made up to 2 pay periods back. Refer to the end of section 5.1 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.

**Step 1** – To access the Attendance screen, click the Attendance tab under Manager Tasks, then select the Timesheet Group using the drop down menu and click as shown below:

![Attendance Screen](image)

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

**9 Reports**
The reports section allows the user to access the system and view administration reports that have been set up for managers and payroll coordinators. Available reports include employee information reports, output reports and time sheet reports. Note: All reports will show a timestamp in Eastern Time, subtract one hour from this time for Central Time.

After a user logs in, they can access the reports section by selecting the Reports tab from the menu bar. The following screen will be displayed:

9.1 Accessing a Report

There are many different reports available; however, this manual will only show how to create one report, as the process to run each of the reports is very similar. To access a report, complete the following steps:

**Step 1 – Accessing reports:** The reports are set up in a tree format. Clicking the + next to an item will open up new options under that header.

**Step 2 – Access employee reports:** Click on the + next beside report, next click the + next to employee reports. Generate a Report

**Step 1 – Generate an employee calculated time sheet report:** To generate an employee calculated time sheet report, click on it. The following screen will be displayed on the right hand side of the screen:
Step 2 – Enter parameters: To select a pay period and the Hours Type, use the drop down menus.

Step 3 – Select display criteria: Select True to include filter criteria at the end of the report. This allows you to look up the filter criteria at a later time if the report is printed. Select False if to exclude filter criteria from the report.

Step 4 – View the report: Click View Report. The following report will be displayed:
Saving the Report
The reports can be printed in Word, Excel, or PDF format.

Step 1– Save the report: After running a report, you may save it by clicking on in the center menu bar. The following screen will be displayed:

<table>
<thead>
<tr>
<th>Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>XML file with report data</td>
</tr>
<tr>
<td>CSV (comma delimited)</td>
</tr>
<tr>
<td>PDF</td>
</tr>
<tr>
<td>MHTML (web archive)</td>
</tr>
<tr>
<td>Excel</td>
</tr>
<tr>
<td>TIFF file</td>
</tr>
<tr>
<td>Word</td>
</tr>
</tbody>
</table>

Step 2 – Select format: Click on the desired format. Follow your browser prompts to save the file to a desired location on your computer. These prompts can vary by web browser and operating system.

Step 3 – Print report: Once the report is saved to your computer, you may print the report using the program that supports the file format you selected.

9.2 Manager Reports

<table>
<thead>
<tr>
<th>Report</th>
<th>Information Included</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Info</td>
<td>Run this report to see detailed employee information including who is the employee’s supervisor and primary payroll coordinator. Can be run by timesheet group, employee, status, FLSA code, salary/hourly and employee category.</td>
</tr>
<tr>
<td>Employee Balances</td>
<td>Run this report to see employee balances by timesheet group. Can be run as of any date, timesheet group, employee and balance type.</td>
</tr>
<tr>
<td>Calculated Timesheet</td>
<td>Run this report to see employee calculated timesheet. Report includes all available hours types summed by employee for the pay period. Can be run by timesheet group, employee, pay period and hours type.</td>
</tr>
<tr>
<td>Time Collection</td>
<td>Run this report to see clock in/out information for hourly employees. Can be run by timesheet group, employee, and date range.</td>
</tr>
</tbody>
</table>
### Timesheet Input
Run this report to see information recorded on employee timesheets including hours recorded per day. Report shows total hours per pay period and can be run by timesheet group, employee, pay period and hours type.

### Timesheet Modified by someone else
Run this report to see which employees had their timesheet modified by a manager. Can be run by timesheet group and pay period.

### Timesheet Status
Run this report to see which employees completed their timesheets and/or which supervisors have approved timesheets.

### Timesheet Validation
Run this report to see what warnings or error message are on employee timesheets. Can be run by timesheet group, employee, pay period, validation level and validation codes.

## 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.

---

TAL works best with IE9, IE10 & Firefox. Some versions of IE11 will work. TAL does not currently work in Chrome.

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
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 time sheet that is outside of the approved interval, the employee and Payroll Coordinator will receive a message as seen below:

This message instructs the payroll coordinator to correct the error on the time sheet 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.

## 11 ACA Tracking

The Affordable Care Act requires hours to 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 hours 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 hours on behalf of the employee.
   - 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” and enter a 6 in the Monday column, as shown below.

Click 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.
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) 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.

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>