

Time, Attendance and Leave  
Town Hall  
Updates and Reminders

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Lyndi Zavy

- Review the Time, Attendance and Leave (TAL) project
  - Reiterate important information
- Discuss updates since first round of Town Halls
- Understand the resources and support available to assist employees through transition

# Major Impacts

TAL

- All OUHSC and OUHSC-based Tulsa employees transition to biweekly pay **May 31, 2015**
- ecotime will be used for
  - Hourly employees to track hours worked
  - Tracking leave taken and balances for all employees
  - Leave requests and timesheets for all employees

# Reasons for TAL Implementation

TAL

1. Monthly payroll is challenging for administration, recruitment

2. Affordable Care Act (ACA) changes require tracking part-time employee hours in real-time

3. State of OK moved to biweekly January 2013

# Transition to Biweekly Pay

TAL

- The last monthly paycheck will be May 29, 2015
- The first biweekly paycheck will be June 26, 2015
  - Pay day will be every other Friday, PPP remains mid-month
- Employees can convert leave into funds to bridge the gap
  - Up to 80 hours of leave (including comp time for hourly employees), and up to 40 hours of which can be Extended Sick Leave (Sick Leave for Residents)

May						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

June						
Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

July						
Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	
2	3	4	5	6	7	

# Leave Conversion Updates

TAL

- Paid out on **June 12, 2015**
- Leave conversion is proportional to FTE
  - e.g., .50 FTE employees can convert up to 40 hours of leave, of which 20 hours can be ESL
- 9/12 and 10/12 faculty can only convert up to 40 hours of ESL
- University provided 24 hours (or prorated equivalent) of Administrative Leave at holidays
  - Save this PTO for the conversion!

# Leave Conversion Updates

TAL

- Employees will complete forms to select leave conversion
  - Form will be sent February 2<sup>nd</sup>, due no later than May 8<sup>th</sup>
    - Will include supervisor name to configure TAL
    - All leave balances must be accurate
  - Payroll Coordinators can designate funding sources
- Grant-funded employees can convert leave
  - Can be funded from grant unless specifically prohibited
- Residents should contact GME office with questions
- Graduate students should contact Graduate College.

- Important to prepare new hires for transition to biweekly pay
  - Discuss at interview and throughout hiring process
- Anyone hired after January will not accrue 80 hours of leave to cover the conversion
- Encourage new hires to save as much leave as possible
- Updated offer letter wording
- Lag between hire paperwork and ability to use web clock



# New Hires in 2015

TAL

## 18 hours per month

<u>Start Month</u>	<u>Accrual at Cutover</u>	<u>% to save</u>
Oct	126	63%
Nov	108	74%
Dec	90	89%
Jan	72	100%
Feb	54	100%
Mar	36	100%
Apr	18	100%

## 20 hours per month

<u>Start Month</u>	<u>Accrual at Cutover</u>	<u>% to save</u>
Oct	140	57%
Nov	120	67%
Dec	100	80%
Jan	80	100%
Feb	60	100%
Mar	40	100%
Apr	20	100%

## 22 hours per month

<u>Start Month</u>	<u>Accrual at Cutover</u>	<u>% to save</u>
Oct	154	52%
Nov	132	61%
Dec	110	73%
Jan	88	91%
Feb	66	100%
Mar	44	100%
Apr	22	100%

- Employee Assistance Program
  - <http://healthysooners.ouhsc.edu/>
  - 800-327-2513
- Magellan provides legal and financial support for OKC and Tulsa
- Benefits-eligible employees can call up to 3 times/year

- Consumer Credit Counseling Services (CCCS) providing financial workshops starting in January
  - *Take Control of Your Money*
  - Enroll on training calendar online
- Employee discounts
  - <http://hr.ou.edu/edp>
  - <http://Magellanassist.com>

OU Home OU HSC OU-Tulsa

UNIVERSITY OF OKLAHOMA  
HUMAN RESOURCES

HR/Payroll Coordinators | Document Search | Policies | FAQs

**Employment**  
**Benefits**  
**Pay & Records**  
**Learning & Development**  
**International Services**  
**Student Health Insurance**  
**Employee Resources**  
**Manager Resources**

**Quick Links**

- [Employee Self Service](#)
- [Job Search](#)
- [Get Adobe Reader](#)

**Benefits in 2015**  
Review [benefits information](#) for 2015.

**Managers: New Guidelines for Tracking Work Hours**  
Click here to [review updated payroll requirements](#) for the Affordable Care Act.

**Time, Attendance, & Leave (TAL) Project @ HSC**  
Paycheck calendars and payroll processes for employees in Health Sciences Center programs (OKC and Tulsa) will change in May 2015. Click here for information about the [TAL Project](#).

**Postpone Travel to West Africa**  
The Center for Disease Control (CDC) has issued a Level 3 Travel Warning recommending that people avoid non-essential travel to Guinea, Liberia, and Sierra Leone. Education-related travel to these countries should be postponed until further notice: [CDC Travel Warning](#).

**Popular Services**

- [Workshop Calendar](#) - Enroll in Workshops for OU Employees
- [Employee Self Service](#) - View Your Paycheck and Insurance
- [New Employee Step-by-Step Process](#)
- [OU Employee Discount Program](#)
- [Verify Employment or Income](#) - Use the Work Number

- Consider talking with a credit union or bank regarding your loans
- View and print the letter to creditors available on <http://www.ouhsc.edu/taltalk>
- Student loan forgiveness program
  - <http://studentaid.ed.gov>
  - Search *Public Service Loan Forgiveness*

# Biweekly Deduction Update

TAL

24 Deductions Per Year	26 Deductions Per Year
Medical	All Retirement Deductions
Dental	FSA Health
Vision	FSA Dependent Care
Employee/Spouse Long Term Care	Long Term Disability
	Payroll Deductions set by employee such as United Way, Campus Campaign
Life/Supplemental Life / Dependent Life	Garnishment/tax levy
Employee/Dependent AD&D	Child support/spousal support
Parking	Student Loan Deductions
Health Club	

# Biweekly Deduction Reminder

TAL

- Typically, months with 3 pay periods will not have deductions listed as 24 deductions/year deducted
  - 3<sup>rd</sup> check in October 2015 WILL have premium deductions to avoid deductions from 80 hour conversion
  - First ‘benefits premium holiday’ will be April 2016
  - Other deductions (listed as 26 deductions/year) come out of every check
    - Includes garnishments, child support, etc.

October						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

# Biweekly Deduction Update

TAL

- Athletic ticket deductions will move to the biweekly schedule

April	May	June	July	August
1 monthly	1 monthly	1 biweekly	2 biweekly	1 biweekly
\$250	\$250	\$125	\$125 (twice)	\$125

- Form will be changed accordingly

# Impacts of TAL: Pay

TAL

- Check your W4
  - Extra withholdings based on pay cycle
  - Example: \$100 on W4 is currently \$100/month, would become \$100 every two weeks
- Review withholdings in Self Service
- Make changes to withholdings after May 2015 payroll



# PTO Accrual

TAL

Monthly Accrual	Annual Accrual	1.0 FTE Biweekly Accrual
18 hours	216 hours	8.307692
20 hours	240 hours	9.230769
22 hours	264 hours	10.153846

Maximum of 336 hours remains the same

- PTO will be accrued in proportion to **hours paid**
  - Example 1, LWOP:
    - Employee accrues 8.307692 hours of PTO (equivalent to 18 hours/month now)
    - Has 20 hours of leave without pay (LWOP) in a pay cycle
    - Would accrue 6.230769 hours (75%) of their PTO for the pay cycle
  - Example 2, .80 FTE:
    - Accrues 80% of PTO (6.646153 hours)
- PTO does not accrue while on LWOP or Extended Sick Leave (ESL)

# Leave Updates

TAL

- New workweek Sunday-Saturday
  - One two-week FLSA calendar
- No negative leave
- Employees will select 'leave taken' on leave requests
  - System will cascade leave



# Leave Updates

TAL

- One Holiday schedule
- Working holidays:
  - Employees earn straight time for working and bank the holiday
- Salaried employees without leave working partial day will not go into Leave Without Pay
  - Can be disciplined for this
- Leave accrual and deduction are delayed 2 weeks
  - Some accrual and deduction for 2015 occurs in 2016

# Overtime Updates

TAL

- Hourly employees will be paid OT for working over 40 hours Sunday-Saturday
  - Unless compensatory time has been elected
- Leave and holidays do not count as time worked for purposes of overtime calculation
  - Effective January 1, 2015

# Comp Time Updates

TAL

- Any remaining comp time will be paid out in May 2015 to zero out balances prior to ecotime go live
- No comp time allowed in May
  - Must be paid as overtime
- Going forward, employee paid out one year after comp time accrual
  - System will use comp time via cascading leave

- Effective date for employment status changes are set as first day of the pay cycle
  - Status at end of pay cycle impacts full pay cycle
  - Especially important for changes between salaried and hourly
  - Does not impact new hires

- TAL team working on iteration 3
- System is user-friendly and streamlines processes like FMLA and leave
- tal.ouhsc.edu site for TAL
  - Link for hourly
    - Web clock, leave requests, balances and timesheets
    - Restricted to campus network
  - Link for salaried
    - Leave requests, balances, timesheets
      - Manager/Payroll Coordinator admin
    - Not restricted to network



## EcoTime Web Clock

Please enter your Logon ID and Password	
Logon ID:	<input type="text"/>
Password:	<input type="password"/>
<input type="button" value="Log On"/> <input type="button" value="Help"/>	

The screenshot shows the EcoTime web interface. At the top left is the logo "ecotime By HBS". To its right are navigation tabs: "Employee Tasks", "Messages", and "Log Off". Below these are more tabs: "Timesheet", "Web Clock", "Balances", "TimeOff Request", and "Change Password". The main content area displays the date and time "8/20/2014 10:56:57 AM" and an "In" button. Below this is a "Date:" field with "08/20/2014" and a "Retrieve Data" button. At the bottom, a "Punch History" section shows navigation links "<< Previous Day", "Wednesday 08/20/2014", and "Next Day >>". A message below the punch history states "Data was not found for 08/20/2014".

**Balance Information for Zavy, Lyndi Porter**  
YTD time off used

Accrual Balances					
Category	Earned	YTD Taken (-)**	Current Balance	Approved Leave Balance	Potential To Earn
<a href="#">PTO</a>	8.31	0.00	8.31	0.00	227.69

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Time Off Requests from 08/01/2014 to 12/01/2015								
Request Type	From/To	Total Days	Total Hours	Type	Employee Notes	Manager Notes	Review Status	Process Status
Regular	<a href="#">09/08/2014 - 09/12/2014</a>	5	40.00	Vacation	test	You need a better reason to take off!	Approved	Pending

Request Type:

Time Off request can be submitted within 09/07/2014 and 12/20/2015

Submit Time Off Request			
From mm/dd/yyyy	To mm/dd/yyyy	Type	Action
<input type="text"/>	<input type="text"/>	<Leave>	<input type="button" value="Submit"/>

- One time clock model
  - IT51
  - Runs on Ethernet power
  - Uses existing ID card
- TAL team working on placement, deployment
- If an employee clocks in on a physical time clock, must clock out on a physical time clock



- ACA requires reporting hours for  $< .75$  FTE
- Options ranging from most effort/lowest cost to least effort/highest cost
  1. Duration timesheet to track actual hours
  2. Adjunct Professor/Graduate Assistant Safe Harbor formulas
  3. Assume 8 hours for any day worked
  4. Assume 40 hours for any week worked
  5. Don't track hours
    - Employee assumed to have full-time eligibility

- ecotime must be configured for one supervisor per employee for time and leave approvals
  - Supervisors will be gathered with leave selection
  - Can delegate to others within system
  - New ePAFs will require this information

# New Features

TAL

- Paycheck modeler
  - Self-service ability to simulate paychecks
- Electronic W4
  - State and Federal
  - Separate for regular and PPP

# Questions?

TAL

- Lyndi Zavy, TAL Change Management Lead
- Kevin Fitzgerald, Project Manager

[TAL-Questions@ouhsc.edu](mailto:TAL-Questions@ouhsc.edu)