Time Reporting Training
Agenda

- Timesheet Overview
- Roles & Responsibilities
- Leave Requests & Hourly Timesheets
- Approving Requests
- Warning Messages vs Hard Stops Resources
- Tips & Reminders
Timesheet Overview- Timekeepers

Timekeeper Access:

• Timekeepers have the ability to enter, correct, and submit time in PeopleSoft.

Types of Entries:

• Leave Requests (e.g. Vacation leave, Sick Leave, Jury Duty, Educational Activities, Bereavement)

• Comp time/Over time

• Hourly timesheets
Leave Requests
Leave Requests

What’s new?

• UTEP employees can now submit leave requests in PeopleSoft for:
  ✓ Vacation leave
  ✓ Sick Leave
  ✓ Jury Duty
  ✓ Educational Activities
  ✓ Bereavement

• Leave requests submitted by Employees and Timekeepers will route to the employee’s “Reports To” Manager.

Please encourage staff to submit their own leave requests as it makes it easier for manager to approve requests.
Leave Requests- Workflow

How does it work?

Employee Submits

or

Timekeeper submits on behalf of the Employee

Reports To Approval *

Update PeopleSoft

* If the Reports To position is vacant, request will route to the Next Level Supervisor.
Employees Eligible for Leave

- Timekeepers will be able to enter and submit leave for the following employee types:

<table>
<thead>
<tr>
<th>Employee types</th>
<th>Absences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classified</td>
<td>Yes</td>
</tr>
<tr>
<td>Faculty</td>
<td>Yes (sick leave only)</td>
</tr>
<tr>
<td>A&amp;P</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Timekeeper Roles and Responsibilities

What is my role?

• **Submit and modify** leave requests as an exception, all submissions will route to the employee’s “Reports To” for approval.

• **Comp time/Over time** will also be processed by Timekeepers- please contact payroll@utep.edu for training.

Other:

• **FMLA** will still be processed by the Benefits Office

NOTE:
FMLA - New Timekeepers will have one month to attend FMLA Training or access will be removed. Please go to campusedge.utep.edu - FMLA for Timekeepers - for dates and times.
Timesheet Policies and Procedures

By when should time be submitted?

• Users have a 90 day pay window from the absence event to enter or make any adjustments.
• Adjustments after 90 days of an event will need to be reported to Absence Management; send requests to payroll@utep.edu.

Attachments?

• Timekeepers do not have access to attach documentation, only employees can add attachments when submitting their own requests.
Time Reporting Codes (TRC)

• Available Time reporting Codes:

  ▪ OCP: Overtime Comp Payout
  ▪ STCTS: State Comp Taken Salaried
  ▪ STADJ: State Comp Adjusted (Admin)
  ▪ STDEC: ST Comp Decrement-Process Only
  ▪ UPDS: Unpaid Salary
Terminology of Absence

• **Absence Event (Leave Request):** The period of time that a payee is absent for the same reason. For example, if a payee is out sick Monday through Wednesday, the three-day absence is referred to as ONE absence event.

• **Entitlement (Accrual):** This defines rules for granting paid time off for valid absences, such as sick time and vacation. An absence entitlement defines the amount, frequency and period (Monthly Accrual).

• **Cascading:** A feature in the Absence Management module which automatically deducts submitted absence hours against a prioritized order of an employee’s accrued balances.
Cascading

• **Cascading** is a new concept used in PeopleSoft to automatically deduct leave hours from various leave balance types, if the employee does not have an available balance.

• **Cascading Acronyms:**
  - **VAC** - Vacation
  - **Unpaid Abs** - Unpaid absence
  - **EA** - Educational Activities
  - **COMP** - Comp time
  - **O/T-FLSA** - Overtime-Fair Labor Standards Act
What is Cascading?

<table>
<thead>
<tr>
<th>Leave Type (Element)</th>
<th>Order of Deduction against Leave Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation</td>
<td>Vacation</td>
</tr>
<tr>
<td>Sick</td>
<td>Sick</td>
</tr>
<tr>
<td>Educational Activities*</td>
<td>Educational Activities/Sick</td>
</tr>
</tbody>
</table>

- If Absence leaves cascade into unpaid leave it will automatically deducted from your following paycheck.
An employee has the following available leave balances:

- 20 hours of vacation
- 36 hours of sick
- 16 hours of comp time

The employee submits 40 hours of vacation. The time is approved by their reports-to manager.

What will happen?

- 20 hours will be pulled from their available vacation hours
- Their available sick hours will be skipped (because it is not in the vacation cascading order)
- 16 hours will be pulled from their available comp time hours
- 4 hours will go unpaid.
Timekeeper
Leave Request
Submissions
Leave Request- Timekeeper Submission

Before you begin:

• Written approval from the employee’s Manager will be required before submitting the request in PeopleSoft.
• You will keep a copy of the written statement for your records.
• If you have issues accessing the module or finding the employee submit a ticket to helpdesk@utep.edu for further support.
Navigation to enter Leave Requests

1. From the Employee Self Service drop down select the **Workforce Administrator**.
2. Click the **Time and Labor Administration** tile.
Enter Vacation Leave Requests

3. Search for employee using Empl ID, Last Name, or First Name fields
4. Click Get Employees button.
5. Employee will populate, select employee.
Enter Vacation Leave Requests

6. Select to View By:
   - Calendar Period – one pay period
   - Day – one day at a time
   - Week – one week at a time
7. Select Date field and click the green Refresh icon.
8. Select Absence tab.
9. Click Add Absence Event button.
10. Enter Start Date and End Date of vacation time requested.
11. From the drop down menu arrow, select the Vacation Leave.
12. Click Details link to input additional information.
Enter Vacation Leave Requests

13. Absence Event Detail Screen will be displayed; verify the information is correct.
   13a. If the request if for a full day, select none. If the request is for a partial day select All Days.
   13b. Enter the hours.
14. Click on the Calculate End Date or Duration to sum up all requested hours.
15. Click the OK button.
16. You will then be redirected to the Timesheet, select the Submit button to continue.
17. From the Submit Confirmation screen, click OK to complete.
18. The request will route to the employee's supervisor. If your supervisor approves, the time will be recorded and reflect until the next pay cycle. If the request is denied, you will need to modify and resubmit.
Enter Sick Leave Requests

1. Search for employee using Empl ID, Last Name, or First Name fields.
2. Click Get Employees button.
3. Employee will populate, select employee.
Select to View By:
- Calendar Period – one pay period
- Day – one day at a time.
- Week – one week at a time

Select Date field and click the green Refresh icon.

Select Absence tab.

Click Add Absence Event button.

Enter Start Date and End Date of vacation time requested.

From the drop down menu arrow, select Sick Leave.

Click Details link to input additional information.

Enter Sick Leave Requests
Enter Sick Leave Requests

11. Absence Event Detail Screen will be displayed; verify the information is correct.
   11a. If the request if for a full day, select none. If the request is for a partial day select All Days.
   11b. Enter the hours.
12. Click on the Calculate End Date or Duration to sum up all requested hours.
13. Click the OK button.
14. You will then be redirected to the Timesheet, select the Submit button to continue.
15. From the Submit Confirmation screen, click OK to complete.
16. The request will route to the employee’s supervisor. If your supervisor approves, the time will be recorded and reflect until the next pay cycle. If the request is denied, you will need to modify and resubmit.
Timekeeper Leave Request - Workflow

How does it work?

1. Timekeeper submits on behalf of the Employee
2. Reports To Approval *
3. Update PeopleSoft

* If the Reports To position is vacant, request will route to the Next Level Supervisor.
# Leave Requests - Roles and Responsibilities

<table>
<thead>
<tr>
<th>Employee</th>
<th>Timekeeper</th>
<th>Reports To</th>
</tr>
</thead>
</table>
| • Submit leave requests  
• Cancel leave requests | • Submit leave request  
• Add comp time  
• Submit leave utilizing comp time | • Review leave requests  
  ▪ Approve  
  ▪ Deny  
  ▪ Pushback |
Am I able to see requests submitted by employees?

Based on departmental access, Timekeepers have access to the employee's timesheet and can continue to review time information here:

- Time and Labor Administration

![Time and Labor Administration](image)
### Resources - HCM Queries Available

Nav Bar > (Tile) Navigator > (Link) HCM Reporting Tools > Query > Query Viewer

<table>
<thead>
<tr>
<th>Description</th>
<th>Location</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leave, accruals, &amp; deductions by pay period</td>
<td>HCM Reporting Tools</td>
<td>UTZ_HA_TIMEKEEPER</td>
</tr>
<tr>
<td>Search by time frame to see absence requests</td>
<td>HCM Reporting Tools</td>
<td>UTZ_HA_DAILY_ABSENCE_CAMPUS_DT</td>
</tr>
<tr>
<td>Monthly accruals by calendar group</td>
<td>HCM Reporting Tools</td>
<td>UTZ_HA_MONTHLY_ACCRLS</td>
</tr>
<tr>
<td>Absence entries by dates</td>
<td>HCM Reporting Tools</td>
<td>UTZ_HA_ABM_EVENTS_DETAILS</td>
</tr>
</tbody>
</table>
Resources - Training Materials

Timekeeper Training

- Time Reporting

Presentations
- Time Reporting: Timesheets and Leave Requests

Quick Guides
- Hourly Employee Timesheet
- Vacation Leave Request
- Sick Leave Request
- Partial Time Leave Request

For more information visit:
https://www.utep.edu/vpba/peoplesoft/training/documents.html

Employee/Manager Training

- Electronic Leave Requests

Presentations
- Electronic Leave Requests

Quick Guides
- Employee: Leave Request Submission - Full Day
- Employee: Leave Request Submission - Partial Day
- Employee: Resubmitting a Pushback Request
- Employee: Cancelling Leave Requests
- Employee: View Leave Request History

Manager
- Manager: Approving Employee Submissions
- Manager: Approving Timekeeper Submissions
- Manager: Leave Request Submission for Employee: Full Day
- Manager: Leave Request Submission for Employee: Partial Day
- Manager: View Leave Request History

Video Tutorials
- Employee: Leave Request Submission
- Manager: Approving Leave Request Submissions
Approving Requests

Things to Know:

• There are two approval methods when reviewing leave requests:

  • “E-mail” Method*:
    ▪ Document is sent to UTEP email address.
    ▪ Click hyperlink at bottom of email to open the document.
    ▪ Log into PeopleSoft to review document information.

• HRMS Tile:
  ▪ Log into PeopleSoft, from the Employee Self Service homepage select the HRMS Tile.
  ▪ Under Pending Approvals, select the request to review/approve.
Approving Requests Overview

Things to Know:

• Transactions submitted by Timekeepers will be classified as “Reported Time.”

• Transactions submitted by Employees will be classified as “Absence Request.”

• When approving the layout/options will be slightly different; however, the overall design is the same.

• Managers can also review their employee’s time and further details on the Manager Self Service home page under the Team Time and Attendance tile under.
How can the Manager see leave balances for their employees?

1. From the Employee Self Service dropdown, select the **Manager Self Service** option.
2. Select the **Team Time and Attendance** tile.
3. From the left side panel, select the **Absence Balance Details** option.
4. Search for the employee’s **First Name** and **Last Name** to pull results.
Cancelling Requests

Things to Know:

• Employees can submit a cancellation for requests pending approval and for approved transactions.

• Cancellation requests will route to the Manager for approval.

• Managers & Timekeepers currently do not have the ability to cancel requests.

• If cancellations cannot be completed by the employee please contact payroll@utep.edu.
Warning Messages vs Hard Stops

**Warning Messages**
- Warning # 5
  Hours entered on Holiday <Holiday Date> with <Entered TRC>.
- Warning # 11
  Hours entered more than 40 in a week.

**Hard Stops**
- Error # 3
  Straight Comp Hours cannot Accommodate. Please correct.
- Error # 4
  Overtime Comp Hours cannot Accommodate. Please correct.
Timekeeper

Hourly Timesheet Submission
Hourly Timesheet Submissions

What is my role?

• **Hourly timesheets** will be processed by Timekeepers

• Timekeepers will be able to enter and submit timesheets for the following employee types:

<table>
<thead>
<tr>
<th>Employees</th>
<th>Timesheet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hourly Employees</td>
<td>Yes</td>
</tr>
<tr>
<td>Hourly Students</td>
<td>Yes</td>
</tr>
<tr>
<td>Faculty</td>
<td>No</td>
</tr>
<tr>
<td>A &amp; P</td>
<td>No*</td>
</tr>
<tr>
<td>Classified Exempt</td>
<td>No*</td>
</tr>
<tr>
<td>Classified Non Exempt</td>
<td>No*</td>
</tr>
</tbody>
</table>

*Note: Timekeeper will only need to submit timesheet to enter comp time, overtime and/or any other special circumstances as determined by the University policy.
Hourly Employee Timesheets

Before you begin:

- Student will submit and sign the Casual Labor/ Hourly/ Workstudy Time Record

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Department</th>
<th>Division</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>UT EID</th>
<th>Month/Year</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Work Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>In</td>
</tr>
<tr>
<td>-----</td>
</tr>
<tr>
<td>0:00</td>
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<tr>
<td>0:00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Classification (Please Check One):</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] Casual Labor</td>
</tr>
<tr>
<td>[ ] Hourly</td>
</tr>
<tr>
<td>[ ] Workstudy</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Classification (Job Code)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Pay Period (Please Check One)*</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] 1st-15h</td>
</tr>
<tr>
<td>[ ] 16h-31st</td>
</tr>
</tbody>
</table>

*Check both if time being documented is for the whole month.
1. From the Employee Self Service drop down select the **Workforce Administrator**.
2. Click the **Time and Labor Administration** tile.

Navigation to Enter Hourly Timesheets
Hourly Timesheets Process

3. Search for employee using Empl ID, Last Name, or First Name fields.
4. Click Get Employees button.
5. Employees will populate, select employee.
Hourly Timesheets Process

6. Use the drop-down to View By:
   - Calendar Period – Displays one pay period
   - Day – Displays one day
   - Week – Displays one week

7. Enter the Date and click the green Refresh icon to display results.

8. Enter hours worked under the Quantity column.

9. Click Submit for processing.

10. Then click OK to confirm Timesheet submission.

11. Submitted hours will reflect under Reported Hours.

12. You can use Print Timesheet to print a copy of submitted time.
# Roles and Responsibilities

<table>
<thead>
<tr>
<th>Hourly Employee</th>
<th>Reports To</th>
<th>Timekeeper</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Submit timesheet to Timekeeper/Manager</td>
<td>• Review/Approve hourly timesheet.</td>
<td>• Submit hours in PeopleSoft</td>
</tr>
</tbody>
</table>
Coming Soon- Hourly Time Sheets

Things to Know:

• Approval routing will use "Reports To."
• "Reports To" can be updated by using the Position Action Change eForm.
• Training will be provided to multiple groups of employees.
• Queries will be available to ensure deadlines are met.

Employee  Reports To  Payroll

Expected Date: August 2020
Tips & Reminders

• If a Reports To manager is out on extended leave and unavailable to approve leave requests, please submit a helpdesk and we can re-route the leave request.

• Submit a Help Desk ticket to helpdesk@utep.edu for any technical issues related to leave request submissions.

• For general questions on processing leave, contact the Payroll Office at payroll@utep.edu.
Questions?
THANK YOU!