Salaried Employees Timesheets Town Hall

Employee Self-Service and Manager Self-Service
Time and Absence Reporting
UTShare/PeopleSoft

Hosted by:
Payroll Services
Human Resources
Financial Affairs
Business Information Services
Time & Absence Reporting Project

The goal of the Time and Absence Reporting Project is to transition employees and supervisors to using UTShare PeopleSoft to process employee time worked and absence events.

We are transitioning university employees from using paper or SharePoint timesheet processes into one entry point and application platform for an approval online experience using Employee Self-Service (ESS) and Manager Self-Service (MSS)
Prior Timesheet Process

**Timekeeper**
- Coordinates distribution of timesheets
- Sends reminders
- Other departmental time-related duties

**Employee**
- Reports time worked and/or absences taken on a weekly basis
- Submit timesheet to supervisor for approval

**Supervisor**
- Review employee’s submitted timesheet
- Reconciles using department internal process
- Approves or denies timesheet

**Timekeeper**
- Enters timesheet data into UTShare PeopleSoft
- Departmental archive

Financial Affairs
Prior Timesheet Process

- **Employee**: Reports time worked and/or absences taken on a weekly basis. Submit timesheet to supervisor for approval.

- **Supervisor**: Review employee’s submitted timesheet. Reconciles using department internal process. Approves or denies timesheet.

- **Timekeeper**: Coordinates distribution of timesheets, sends reminders, and handles other departmental time-related duties.

- **Financial Affairs**: Enters timesheet data into UTShare PeopleSoft. Departmental archive.
Timesheet Processing Overview

Employee Functionality
- Submit time worked
- Submit absence request
- Cancel previously submitted absence request
- Submit compensatory time taken
- View absence and compensatory balances

System Functionality
- Maintains workflow
- Maintains notifications
- Pre-populates employee’s schedule on timesheet

Supervisor Functionality
- Approve or deny
  - Reported time
  - Absence request
  - Absence request cancellation
  - Compensatory time reported
- View direct report employee’s absence and comp time balances
- Actions by supervisor are processed by Payroll
Timesheet Processing Overview

- **Employee**
  - Submit time
  - Submit absence

- **System**
  - Workflow activated
  - Notifications initiated (email and system)

- **Supervisor**
  - Reviews submission
  - Approve or deny

- **Employee**
  - Updates time status
  - Updates absence status

- **System**
  - Workflow activated
  - Notifications initiated (email and system)
Timesheet Project Deployments

• April 13
  • Pilot group of 175 employees
  • Included A&P, salaried exempt and salaried non-exempt employees

• May 18 – June 1
  • Deployment group of 175 employees
  • Included A&P and salaried exempt employees

• June 15 – July 1
  • Deployment group of approximately 2,000+ employees
  • Remaining A&P, salaried exempt, and salaried non-exempt employees

• July 20 – July 27
  • Deployment group of approximately 1,300+ employees
  • Hourly staff, hourly students and work-study employees
Timesheet Project Deployment

Employees In Planning Phase
• Remaining selected police and facilities employees not deployed are deferred at this time for planning and possible deployment in 2021.

Other Employee Types
• Faculty are excluded from timesheet reporting unless they have an administrative position with staff direct reports
• Graduate research assistants and graduate teaching assistants will be handled separately and temporarily excluded at this time
Timesheet Resources

- Library of job aids and training videos in one centralized location
  utsa.edu/bis/psupgrade/2020/04/job-aids-training-videos.html

- Intentionally designed to be short and self-service
  - “How do I do ...?” format
  - There are no formal classes to attend

- Timesheet resources are available
  - By employee type
    - A&P
    - Salaried exempt
    - Salaried non-exempt
    - Hourly
    - Work-Study

  - By employee role:
    - Employee
    - Supervisor
Timesheet Navigation

Employees enter time and absences via Time and Attendance tile.

Select the Time and Attendance icon
# Timesheet Navigation

## Time and Attendance

### Absence Balance Summary

- **Department**: BH001
- **Employee Classification**: CL
- **Payroll Status**: Active

### Comp Time Straight

<table>
<thead>
<tr>
<th>Date</th>
<th>Balance As of Date</th>
<th>Previous Balance</th>
<th>Take Hours</th>
<th>Accrued Hours</th>
<th>Adjusted Hours</th>
<th>Current Balance</th>
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**Change Job Record**
Request an Absence Event

Select the **Request Absence** tab.
Request an Absence Event

Select the absence type from the Absence Name drop-down menu.

For information on how to enter any other absence events, email Leaveadmin@utsa.edu
Request an Absence Event

Select the Start Date and End Date.
Request an Absence Event

1. If not a Partial Day absence request, select **None** for a full day absence
2. Select **Done** when complete
Cancel or Modify an Absence Request

**Approved**
- Request to cancel in cancel absences
- Wait for approval
- Modify the cancelled event in view requests

**Submitted**
- Request your supervisor to deny the request or push it back
- Once the request has been denied or pushed back modify the request in view requests
Approve, Deny and Pushback an Absence Request

Select the **Absence Requests** tab. Then select an employee.

<table>
<thead>
<tr>
<th>Name</th>
<th>Employee ID</th>
<th>Job Title</th>
<th>Approval Process</th>
<th>Absence Name</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
<th>Submitted</th>
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<td>Sick Leave</td>
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<td>01/06/2020 Submitted 04/06/2020</td>
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</table>
Approve an Absence Request

1. Add any comments in the Approver Comments field, optional.
2. Select Approve.
Deny an Absence Request

1. Add any comments in the Approver Comments field, required
2. Select Deny
Pushback an Absence Request

1. Add any comments in the Approver Comments field, required
2. Select Pushback
Timesheet Frequency

• A&P employees complete timesheets on a monthly basis.

• All other employees complete timesheets on a weekly basis.
Timesheet Navigation

Employees enter time and absences via Time and Attendance tile.

Select the Time and Attendance icon
For a monthly timesheet view:
1. Select **Calendar Period** in the **View By** field
2. Enter the first date of the calendar month
3. Select the refresh icon button

You default into the Timesheet page

Hours populate with employee's assigned work schedule
Use the scroll bar to review your time for the entire month before submitting.
Timesheet Preview — Exempt

You default into the Timesheet page

Hours populate with employees assigned work schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/20</td>
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</tr>
<tr>
<td>4/21</td>
<td>8.00</td>
</tr>
<tr>
<td>4/22</td>
<td>8.00</td>
</tr>
<tr>
<td>4/23</td>
<td>8.00</td>
</tr>
<tr>
<td>4/24</td>
<td>8.00</td>
</tr>
</tbody>
</table>

Total: 40.0 hours
Begin by selecting your weekly timesheet:
1. “Week” defaults in View By field, no action needed.
2. Enter Monday’s date for the required week.
3. Select the refresh icon button
4. Hours will auto-populate with employee’s assigned work schedule
5. If you have no adjustments, click Submit
Timesheet Submit Confirmation

The Submit was successful.
Time for the Week of 2020-04-06 to 2020-04-12 is submitted

Select OK button to confirm your timesheet submission.
Timesheet Navigation

Supervisors review reported work time and absence requests via HRMS Approval tile.

Select **HRMS Approvals** via Employee or Manager Self-Service

Either route will take you to your **Pending Approvals** page
Pending Approval – View By Options

1: Select the “From” option in View By when an employee has a mixture of absence(s) and time for review.

2: Select employee

Other View By options include:
From, Date Routed and Type (Absence Request or Reported Time)
### 1. Select line(s) for approval or deny

- **Time Period**: 01/20/2020 - 01/24/2020
- **Quantity for Approval**: 28.00 Hours

<table>
<thead>
<tr>
<th>Select</th>
<th>Report Date</th>
<th>Time Reporting Code</th>
<th>Quantity for Approval</th>
<th>Reported for Date / Scheduled for Date</th>
</tr>
</thead>
<tbody>
<tr>
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<td>01/20/2020</td>
<td>HOL - Holiday</td>
<td>8.00 Hours</td>
<td>8.00 Hours / 0.00 Hours</td>
</tr>
<tr>
<td>☑</td>
<td>01/21/2020</td>
<td>WRKS - Hours Worked</td>
<td>8.00 Hours</td>
<td>8.00 Hours / 8.00 Hours</td>
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<td>WRKS - Hours Worked</td>
<td>8.00 Hours</td>
<td>8.00 Hours / 8.00 Hours</td>
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<tr>
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<td>01/23/2020</td>
<td>WRKS - Hours Worked</td>
<td>0.00 Hours</td>
<td>0.00 Hours / 8.00 Hours</td>
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<td>WRKS - Hours Worked</td>
<td>4.00 Hours</td>
<td>4.00 Hours / 8.00 Hours</td>
</tr>
</tbody>
</table>

### 2. Select Approve or Deny button after you review and selected lines

**Approve**

**Deny**
Review – Approve or Deny

Select Submit button to confirm approval.

Supervisors are the final approver, Payroll Services processes the time you approve at this point.

When Deny is selected approver comments are required to the employee and record.
Employee Schedules

- Timesheet uses the employee’s schedule for:
  - Pre-populating employee’s timesheet for their convenience
  - When submitting an absence for a full day, uses the employee’s schedule work hours for the requested absence day

- For schedule changes, supervisor submits the Schedule Change Request Form to the Payroll Services: [utsa.edu/payroll/forms.cfm](https://utsa.edu/payroll/forms.cfm)

- Hourly and work-student employees do not have schedules
The employee to supervisor relationship is **solely** controlled by the Reports To field in the employee’s Job Data record.

- Establishes timesheet and absence workflow
- Establishes all timesheet related email notifications
- Submit a Position Attribute Change eForm to update the “Reports To” if the employee to supervisor relationship is incorrect ([utsa.edu/hr/eForms/JobAids/](http://utsa.edu/hr/eForms/JobAids/))
Delegation Functionality

• Delegation authorization is limited to the following positions only: president, senior vice presidents, vice presidents and deans.

• For clarification purposes: senior vice provosts, vice provosts, associate vice presidents, assistant vice presidents, assistant deans, department chairs and other supervisors are not authorized to delegate supervisory responsibility.
Workflow Considerations

- When there is an interruption in the timesheet or absence workflow, Business Information Systems (BIS) will redirect the outstanding submission to a newly designated approval per the department’s direction.

- Contact BIS via a SPOC ticket or call ext. 7762.

- Common Reasons:
  - Supervisor is not available for a period of significant time.
  - Employee’s supervisor position is vacant.
  - Reports to (supervisor) in process of being filled via eForms.
For Follow-Up Questions Please Email
spoc@utsa.edu

Thank you!

Financial Affairs
Payroll Services
Human Resources
Business Information Services