Office of Human Resources and Payroll Services present Leave Traq & Time Traq for Non-Exempt Employees – Manager Overview

Agenda

- Purpose of Leave Traq & Time Traq
- How does Leave Traq Interface with Time Traq?
- Employee’s role in Leave Traq
- Manager, Delegate, & Approver’s role in Leave Traq?
- Who are the Approvers
- Logging into Leave Traq
- Logging into Leave Traq as a Manager
- Approving Leave Documents
- Assigning Delegates
- Approving Leave Documents as a Delegate
- Submitting a Leave document for an Employee
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- Leave Request for Employee
- Help

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What is the Purpose of Leave Traq/Time Traq?

- Online leave request and approval system plus a computer-based timesheet accounting system.

- Used for leave requests of all types - from vacation, sick leave, military leave, jury duty, leave without pay and other types of leave.

- Helps you determine your leave balance for each of the various types of leave.

- Allows you to request leave and have leave approved from wherever you are - work, home, or any location where you can access the Internet.

- Allows assignment of delegates for approvals.

- Submission of your leave documents in Leave Traq uploads the same information into Time Traq (time sheet).

How Does Leave Traq interface with Time Traq?

- When a leave is requested in Leave Traq it is automatically linked to the employee's Timesheet record, if one exists for the reporting period in question.

- After the initial link is made in Leave Traq, the hours associated with the leave request become part of the Timesheet and is recorded as leave (i.e., sick leave 6 hours, etc).

- When the Timesheet is submitted, the leave hours are automatically totaled and sent to payroll with the rest of the Timesheet's hours.

- Leave Traq and Time Traq share the same routing for approval including delegates.

What is the Employee's Role in Leave Traq?

- Daily entry, correction, and submission of leave documents in Leave Traq along with necessary documentation to Office of Human Resources for the current pay period. Weekly entry, correction and submission of timesheets in Time Traq

- Being informed of Texas A&M System Policies and Regulations, the Prairie View A&M University Policies and Procedures and the, Prairie View A & M University Rules regarding work hours and leave

Types of Leave

- Vacation
- Sick
- Sick Leave Pool
- FMLA Leave
- Military Leave
- Parent Teacher Conference
- Leave With Pay
  - Bereavement Leave
  - Voting Leave
  - Volunteer Fire Fighter
- Leave With Pay Cont.
  - Blood Donor
  - Bone Marrow Donor
  - Organ Donor
  - CASA Court Appointed Special Advocates
- Leave Without Pay
- Leave Without Pay disciplinary

System Policies & Regulations

- Sick Leave - http://employees.tamu.edu/employees/benefits/leave/sickLeave.aspx
- Vacation Leave - http://tamus.edu/offices/policy/policies/pdf/31-03-01.pdf
- Sick Leave Pool - http://tamus.edu/offices/policy/policies/pdf/31-06-01.pdf
- FMLA - http://tamus.edu/offices/policy/policies/pdf/31-03-05.pdf
- Military Leave - http://tamus.edu/offices/policy/policies/pdf/31-03-06.pdf
- Death of a Family Member PVAMU Rule- http://www.pvamu.edu/pages/989.asp
- Death of a Family Member - http://tamus.edu/offices/policy/policies/pdf/31-03-03.pdf
- Voting, Jury Duty, Volunteer Fire Fighter, Organ, Bone and Blond Donor, & CASA Volunteer - http://tamus.edu/offices/policy/policies/pdf/31-03-03.pdf
- Leave without pay - http://www.tamus.edu/offices/policy/policies/pdf/31-03-04.pdf

What is the Manager, Delegate, and Approver's Role in Leave Traq?

- Approve all leave documents for employees on a daily basis.
- Ensure that employees submit leave documents timely
    - ❖Vacation & Jury Duty prior to the event
    - ❖Sick Leave as soon as possible after the event
    - ❖LWOP week of the event
- Always have one or more delegate(s) assigned for you at all times.
- Ensure that your delegate will perform your duties in Leave Traq and Time Traq when you are unable to do so.
- Inform your delegates when you will be gone.

Manager, Delegate, Approver Roles

- Submit documents on behalf of an employee if they are unable to do so.

- Complete all Required Training in Train Traq by June 2010
  - ❖ Required Training
    - ✓ HIPAA – Benefits Processors And HRC Course #11009
    - ✓ Time Off Issues for Supervisors Course #2001

- Complete Leave Traq/Time Traq Departmental Administrator Statement of Responsibility and submit the original to Office of Human Resources and a copy to Payroll

Who are the Approvers? What is my role as an Approver?

WHO?

- The Approvers for Time Traq are the same approvers for Leave Traq Documents.

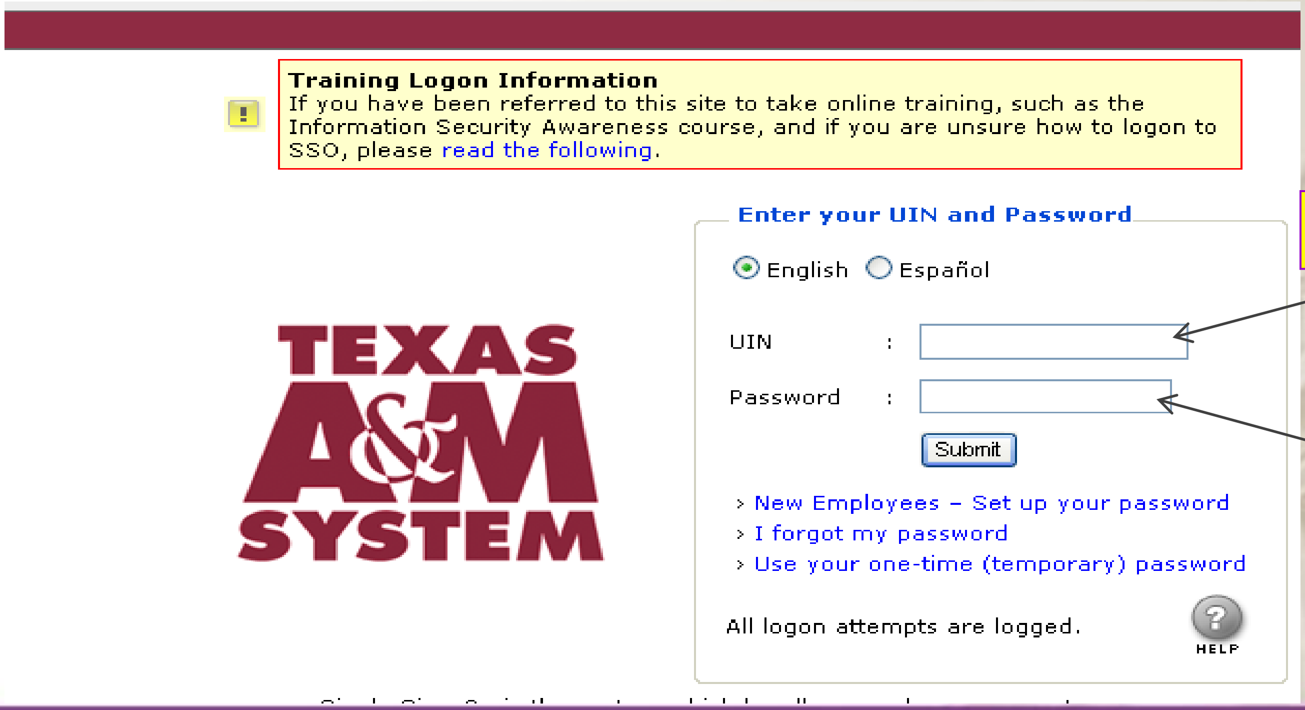
WHAT?

- Approve all leave documents for departmental employees that you manage on a daily basis. Approve employee timesheets on a weekly basis

- All approvers must have at least one “delegate” as a back up in the event you are unable to approve leave documents or the time sheet.

How do I log into Leave Traq?

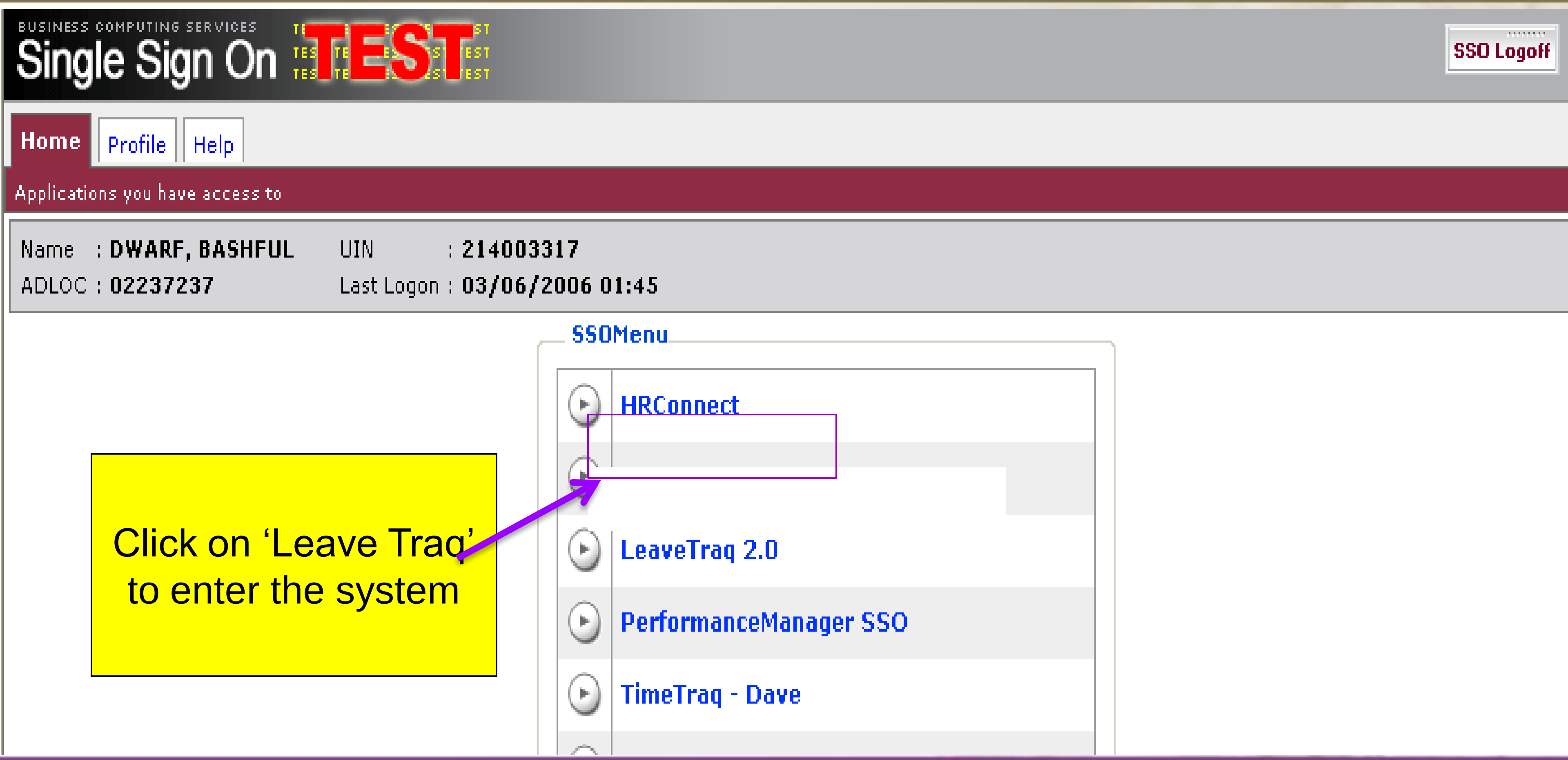
- Leave Traq is accessed through the TAMUS' Single Sign On application (SSO) https://sso.tamu.edu



Enter UIN #

Enter Password

Logging Into Leave Traq Continued



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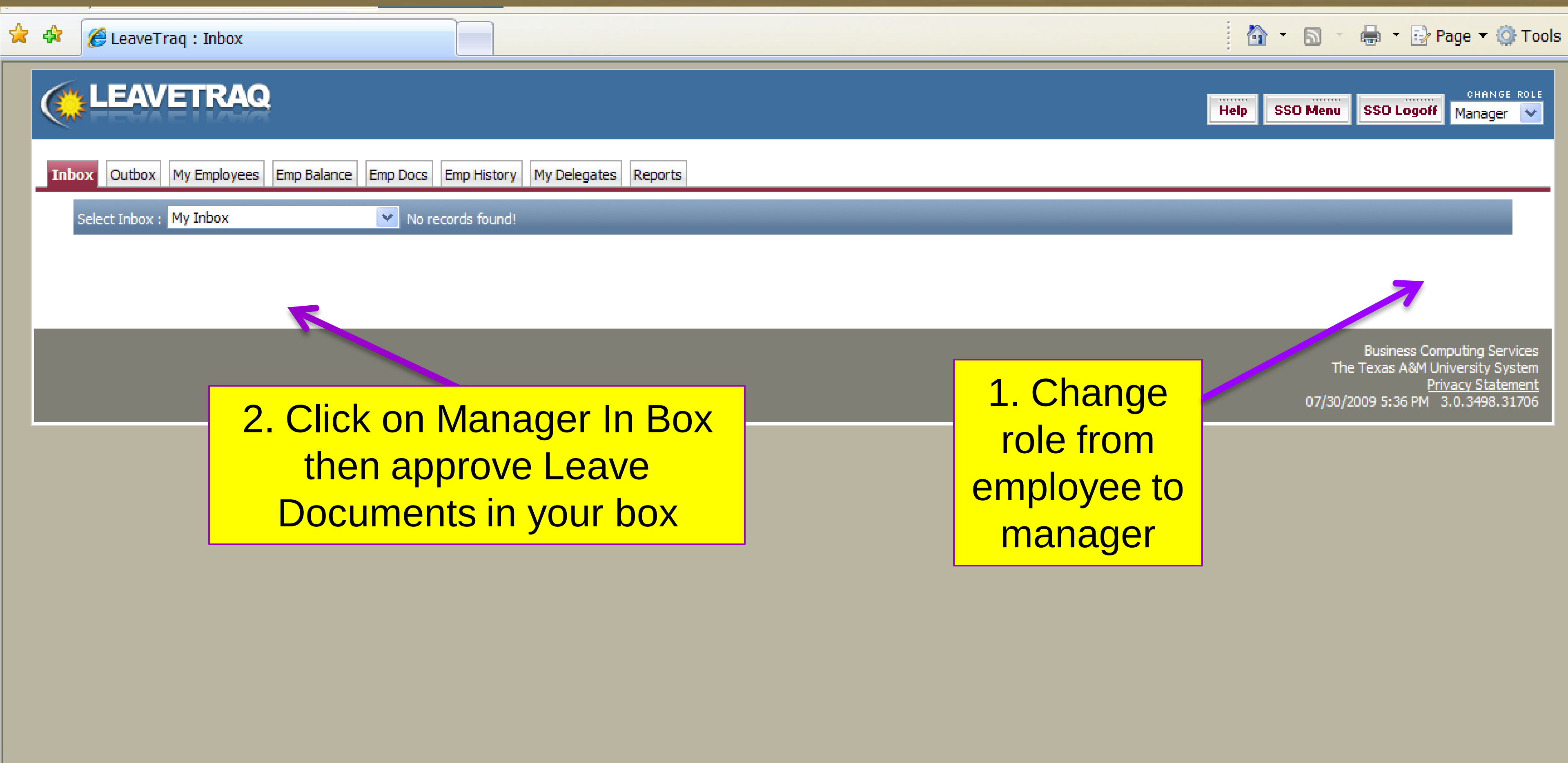
Logging into Leave Traq as a Manager

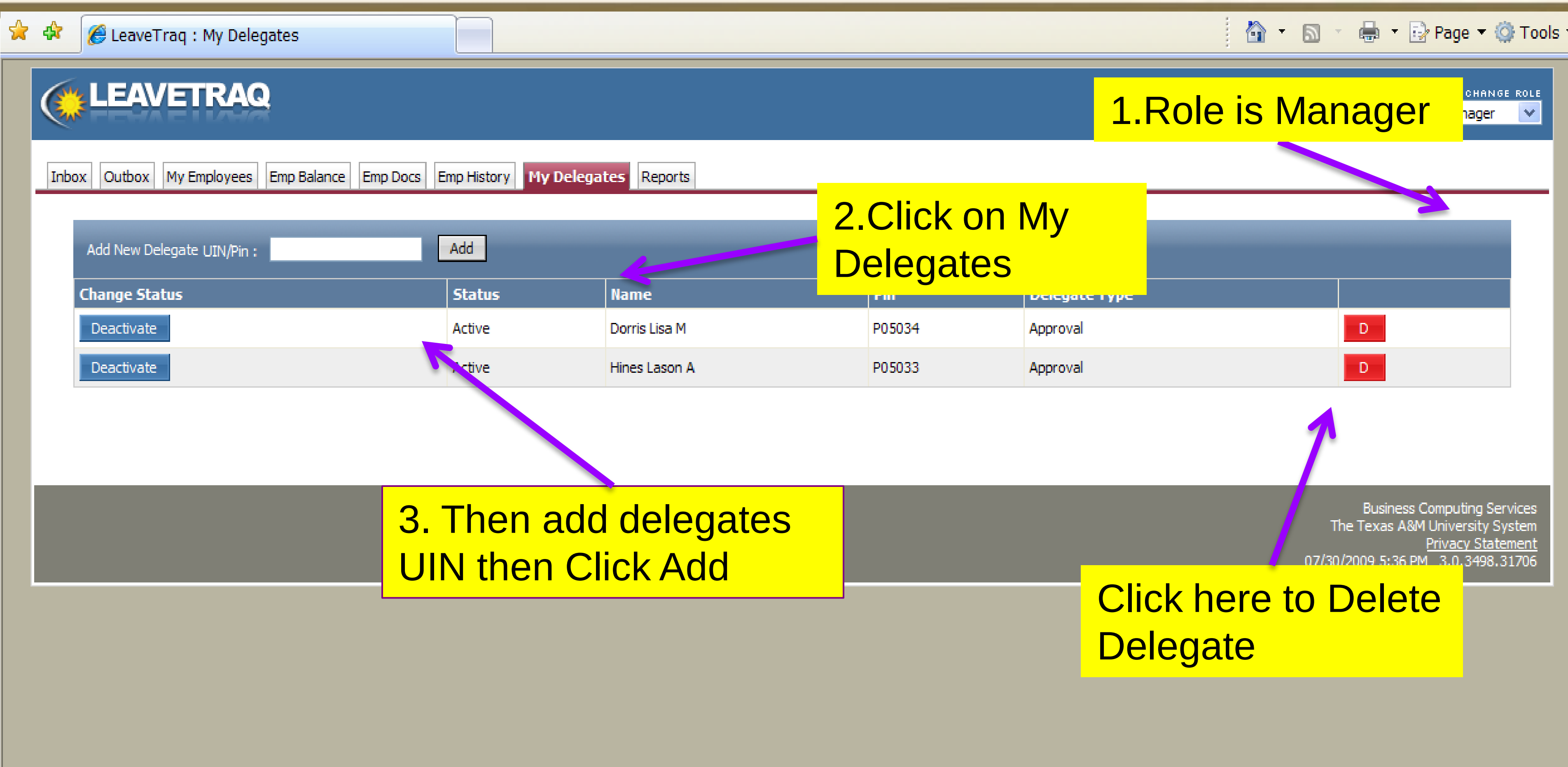


Who is a delegate?

A Delegate is a manager that will approve documents in the approver's absence. It is the responsibility of the manager to ensure that a qualified "Delegate" has been set up in Leave Traq/Time Traq.

Note: As Leave Traq and Time Traq both use the standard hierarchy for managers, the two applications will share the same delegate pool as well. Setting a "Delegate" relationship in one application will give the "Delegate" the same rights in the other. See next slide on how to set up a "delegate".

Assigning/Deleting Delegates



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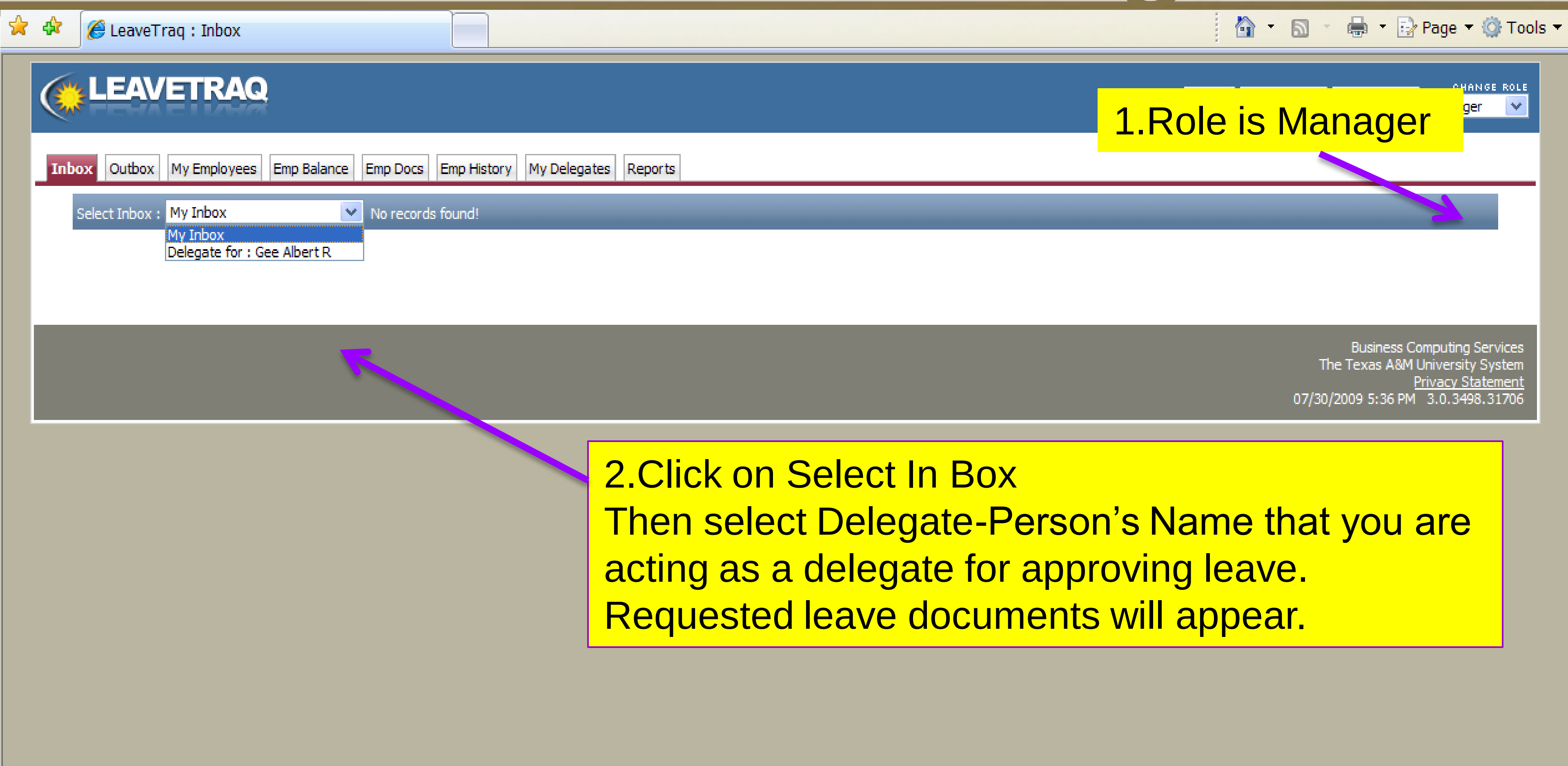
How do I approve Leave documents as a delegate?



1.Role is Manager

2.Click on Select In Box
Then select Delegate-Person's Name that you are acting as a delegate for approving leave.
Requested leave documents will appear.

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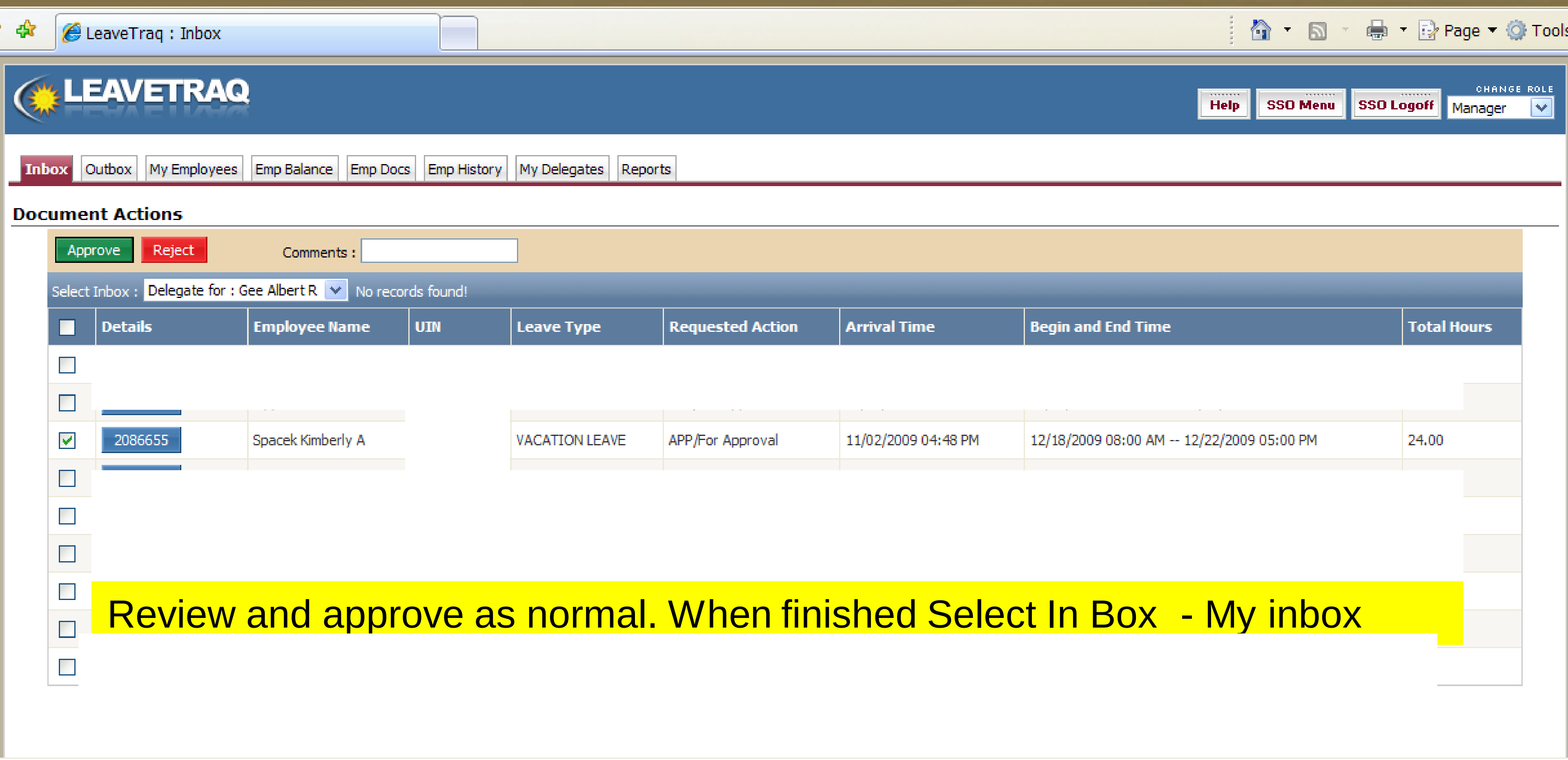
Approving Leave Documents as a Delegate



How Do I submit a leave document for an Employee?

In an **emergency only**, if an employee is absent and unable to submit his/her leave document, then the department leave coordinator submits the document(s) in the Leave Traq system for the employee.

The next slide demonstrates how to submit a leave document for an employee and provide the Office of Human Resources the “Approval of Leave Notification” document that must be completed on behalf of the employee by the Supervisor and entered as “approved leave” into LeaveTraq System by the Departmental Leave Coordinators.

NOTE: The department leave coordinator will need to change their role to “Dept. Admin”. to submit a leave document for an employee.(To change role to “Dept. Admin.,” click on right top corner).

Leave Request Form to be Completed……

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Employee Name___________________________________ Employee UIN#______________________________

Date(s) /Hours of leave requested____

Type of Request:

_______ Compensatory Time ________ Annual Leave

_______Sick Leave ________Sick Leave Pool

_______LWOP ________Jury Duty

_______Military Leave ________Other

Date employee contacted supervisor __________________ ________________(time)

Method of contact used by employee (check all that apply) __________Phone __________Email

________In Person __________Personal Note

Do you have the correct documentation? ________yes ________no

Have you forwarded documentation related to the current event to HR?(email from you regarding an employee being out, the employee's personal note, doctor's excuse, medical certification form, jury summons, military orders, and request for bereavement leave, etc.)

________yes ________no

I certify that the above mentioned employee has contacted me regarding his/her inability to submit leave documents in the LeaveTraq System. The information represented in this form is true and accurate.

Signature of Immediate Supervisor____ Date ______________________________

Printed Name of Immediate Supervisor__________________________________ Phone Number________________

Has the leave time been submitted in Leave Traq? ________yes ________no

I certify that I have officially submitted the above stated employee's leave in the Leave Traq system based on information I have received on this form and as the employee is unable to submit his/her own document(s) in the LeaveTraq System.

Signature of Department Leave Coordinator____ Date___________________

Printed Name of Department Leave Coordinator ____ Phone Number_________________________

Email address___________________________________

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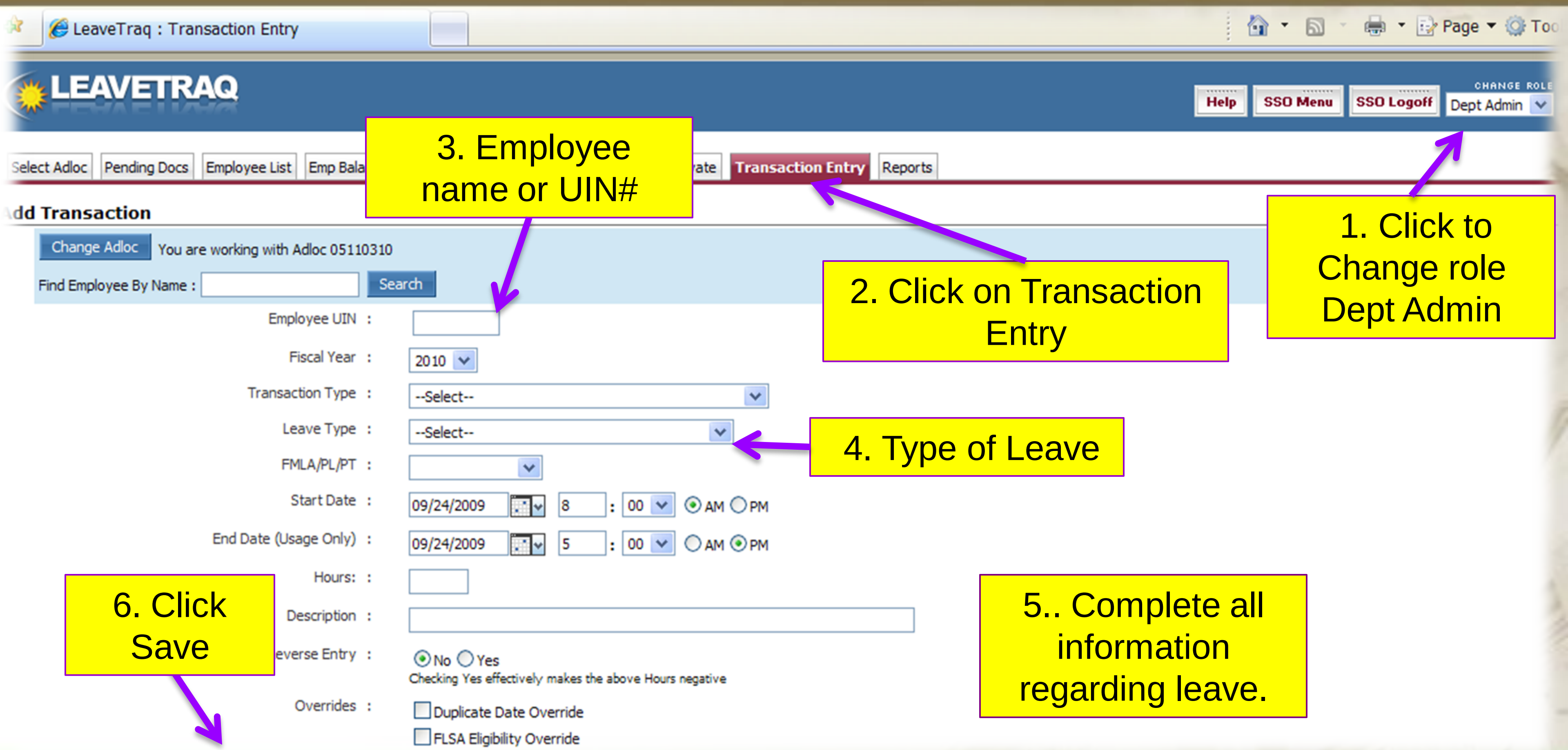
How Does the Leave the Department Leave Coordinator submit a leave for an Employee Cont’d…..

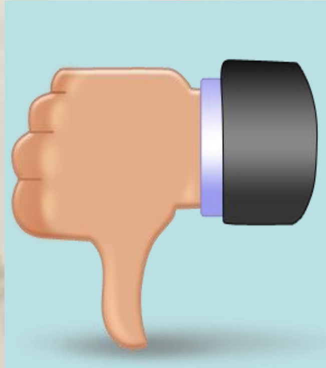


Rules for Successful Completion of Timesheets in Time Traq

- A Timesheet cannot be submitted by an employee if the employee has an un-submitted leave request for the same Reporting Period.
- A Timesheet cannot be approved by a manager if the employee has a leave request that is pending the manager's approval for the same Reporting Period.
- A Timesheet cannot be sent to payroll (as part of the Adloc/Reporting Period batch submission) if the employee has a leave request that is pending the department administrator's approval for the same Reporting Period

NOTE: All leave documents must be approved and finalized and all timesheets completed for submission of an entire adloc to Payroll for processing

Changes to documents after the fact….



- Timesheets once paid, cannot be canceled or otherwise altered.

- Leave requests that were paid as a result of being linked to a Timesheet can be canceled after the Reporting Period has already been processed by payroll.

- When this happens, Time Traq will receive a pending Prior Period Adjustment from Leave Traq and associate it with the current Timesheet.

Changes to documents after the fact….

Timesheets cannot be submitted if they have any adjustments in a pending status; therefore, the departmental administrator will have to resolve the adjustment by adding/removing hours from the current Timesheet to correct an imbalance in pay, or, if no imbalance exists, cancel the adjustment.

Note: The adjustment record references the date of the original leave request so that it can be traced back to the Timesheet to which the correction applies

Rejected Documents

- If your employee has a document that has been rejected - the employee will need to correct the rejected document before he/she can submit his/her timesheet.

- If your employee is out and unable to correct the rejected document – the departmental administrator will need to correct the document before timesheets can be submitted.

  - The Dept. Admin will have to correct
  - Search for the employee's name
  - Click on the rejected document id
  - Correct the document and Submit on behalf of the employee

Scenario

Employee calls in sick to supervisor on Monday. Employee continues to call in sick for the next four days. Employee is unable to submit leave documents. The employee only has 8 hours sick leave and 8 hours vacation leave. Leave Traq and Time Traq documents have to be submitted on Friday. **What can the manager do for the employee?**

1. *Complete Leave approval Notification and have Department Leave Coordinator submit leave for employee and send this documentation to HR.*
   Submitted Sick Leave for employee on Monday (8 hours).
   Submitted Vacation Leave for employee on Tuesday (8 hours).
   Submitted Leave Without Pay for Wednesday - Friday. (24 hours).
   Once the employee returns to work the employee must supply Medical Certification for the five days absent.

OR

2. *Cancel employee's timesheet*

Sick Leave / LWOP

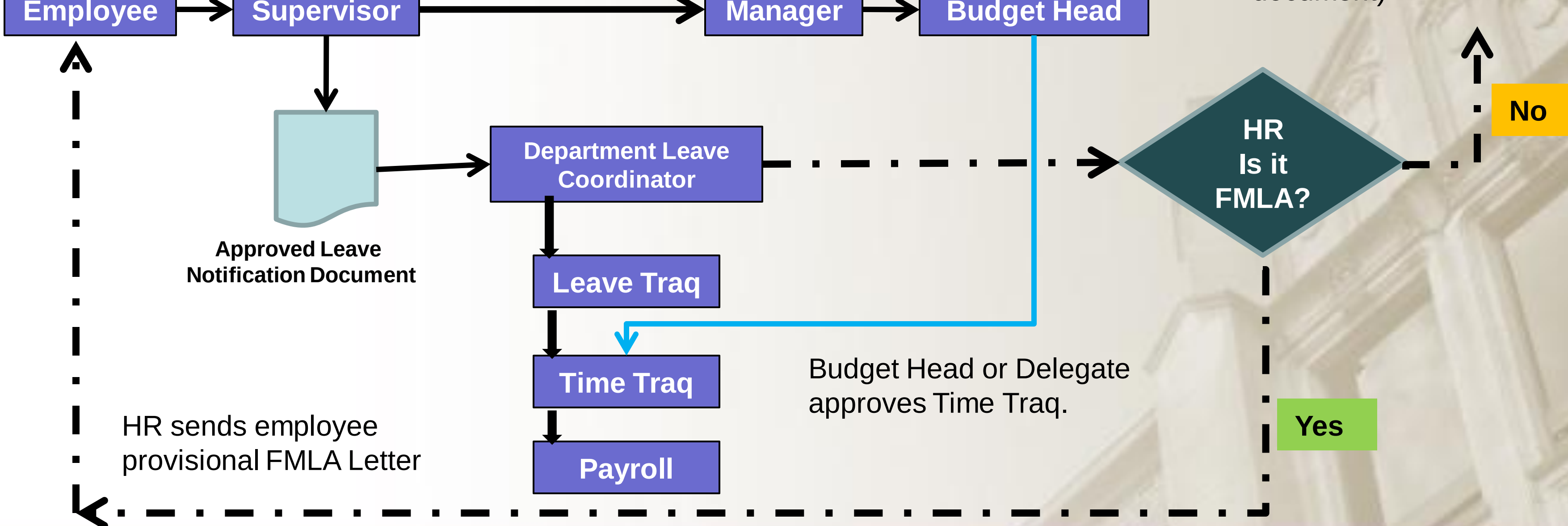
Employee notifies supervisor via telephone of his/her illness.

Supervisor completes the Approval Leave Notification Form that employee is out sick.

Manager notifies the Department Leave Coordinator

Department Leave Coordinator completes paper leave document (forward to HR) and submits in Leave Traq.

HR files a copy of the paper leave document as part of Leave Records .(Department needs to retain the original document)



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Conclusion …What is my role in Leave Traq as a Manager?

- Approve all leave documents for employees on a daily basis.
- Ensure that employees submit leave documents on a daily basis or as soon as possible.
- Have at least one delegate(s) assigned at all times.
- Ensure that the delegate will approve documents in Leave Traq and Time Traq when one is unable to do so.
- Inform delegate(s) when primary approver is away. Submit Approval Leave Notification form on behalf of an employee in their absence to Department Leave Coordinator.
- Ensure all proper documentation associated with an employee's leave is sent to the Office of Human Resources.

Conclusion …What is my role in Leave Traq as a delegate?

- Approve all leave documents for your Manager in his/her absence.
- Ensure that employees submit leave documents on a daily basis or as soon as possible.
- Submit Approval Leave Notification form on behalf of an employee in their absence to Department Leave Coordinator.
- Ensure all proper documentation associated with an employee's leave is sent to the Office of Human Resources

FAQ's for Employees

How do I log on to Leave Traq?

A full description of the process can be found on the Logon Help Page (the web site is https://sso.tamus.edu/main.aspx)

How can I change my password, change my email address, or update my preferences?

This information is contained on the Profile Maintenance Page.

How do I request Leave?

- Click on **the Request Leave** Tab. If a document appears when you go to the **Request Leave** tab, press the "new document" button and you will begin the process of completing a new leave request.
- Enter the beginning and ending times for the leave request, and the number of hours you will be absent. The system will walk you through a process for selecting the type of leave you are taking. Some leave types require additional descriptions; some do not.
- If you are taking leave for multiple days without interruption, your leave item may span several days.
- If your leave crosses a holiday or if you are working between periods of your absence, you may need to create multiple leave items to describe your leave.

FAQ's for Employees

Where do I check my employment information?

On the employee **Home** tab (and also on many other tabs) you are presented with a box that contains you name, title, percent effort and vacation accrual rate. Also in this box is a button that contains the words "more". Pressing this "more" button will expand the employee information box to show you all current employment information that is relevant within the Leave Traq System.

How can I determine the current status of a leave request?
Find the document in question on your **Documents** tab (the documents are sorted by date). The current document status will be listed next to the document.

If you need more information about the document, you may select the document (by pressing on the document ID) and you will be taken to the **Request Leave** tab. This tab is also used to view a document. (**Click On Document History**) Pressing the "View Actions" button will give you the full history of the document, and show you what approvals are pending.

FAQ's for Employees

How does the balance calculation work?

A full description of the balance calculation used in Leave Traq can be found on the Help Tab on the Help page.

My Leave document has been rejected - what should I do?

As an employee, if an document has been rejected by your manager or by an administrator you have two choices:

- Reopen the document and correct, change or delete the items that are in question. After entering the correct information, resubmit the document.
- You may also cancel the document. You may or may not submit another document.

My accrual rate is not correct or my length of service is not correct? Some other data in my employee information box in incorrect. What should I do?

Contact your Human Resource Office at (936)261-1730 or via email at kaspacek@pvamu.edu or leavteam@pvamu.edu . The following link provides the procedure hold have a procedure in place for you to have this information verified and, if need be, corrected. Or by clicking on this link http://www.pvamu.edu/pages/3578.asp

FAQ's for Managers

I don't see the manager tab when I log on to Leave Traq?

The **Manager** tab is given to you at logon when an employee has been set up to report to you under the reporting relationships section. These relationships are set up by either a departmental or central leave administrator. Work with your administrator to get the reporting relationships set up correctly.

The employees listed on the "My employees" tab is not correct?

This is caused by an error in the reporting relationships. Work with your departmental or central leave administrator to get the reporting relationships set up correctly.

How can I control my e-mail notifications?

You can control your notifications for documents needing your approval under the **Profile** tab in the employee section of Leave Traq.

FAQ's for Managers

I want to see a document I approved a few weeks ago. How can I find it?
There are two ways of doing this: Go to your outbox, and change the date range to include the date you approved the document. If you are unsure of the date, use a broad range of dates.

When you find the document, select the document and you will be taken to the **Document Update** tab where you can review the entire document.

Select the employee in question under the **My Employees** tab.

Go the the **Employee Documents** tab. You will see a list of all documents that the employee has submitted. You can also look at prior fiscal years.

Select the document and you will be taken to the **Document Update** tab where you can review the entire document.

FAQ's for Departmental Leave Coordinators

How do I get the role of Departmental Administrator?
Once the director or manager over an ADLOC has specified a departmental leave administrator, the Central Administrator for that agency/institution can set up the departmental leave administrators. This role designation has been made by your Department Head.

What are the primary duties of a leave administrator within Leave Traq?
Review all leave documents. Leave documents needing review will be listed on the pending documents tab under Leave Traq. Insure that the employees use of leave is within TAMUS Policy.

- Ensure that managers approve all Leave documents on a weekly basis.
- Ensure that all employee submit leave documents within the week of the event
- Reset Passwords and unlock employee's accounts
- Forward all appropriate paperwork for employees regarding, sick, sick leave pool, military and jury duty
- Resolve questions with employees about accruals and extended absences.
- Ensure that all managers have a delegate assigned for them in their absence.
- Insure that balances are correct and all documents are completed before an employee transfers or terminates.

FAQ's for Departmental Leave Coordinators

How can I adjust an accrual for an employee?

You should email the Central Leave Coordinator and inform him/her of the accruals that need to be corrected via an email. This information should be reviewed on a monthly basis and corrections should be made within the month of the error.

What if an employee cannot create and submit a leave document?

You must forward this information to the Human Resources Office immediately so that the Central Leave Coordinator can submit the leave documents.

What does "Info Only" mean on the reporting relationships page?

This designation next to a manager PIN on a reporting relationship page indicates the "manager" will only receive an informational email message that the employee has requested leave. The manager can not approve the documents.

What if I can not find an employee on my list and I know they are currently active employees?

You should click on list and then click on Inactive employees. The employee's name should appear. If this happens this possibly means there is an EPA document that is in routing and has not bee approved.

Help?

Help is always available when needed.
You can contact:
Kim Spacek, Employee Benefits Associate
Human Resources
936-261-1728
kaspacek@pvamu.edu or
leaveteam@pvamu.edu