

Time and Attendance System

Facilitator Role

Sign On:

Employees will sign into the Time and Attendance System (TAS) using the link below and enter their existing user id and password. The first time you sign on, you will be asked to verify your First/Last Name, Date of Birth and SUNY ID. This verification is to authenticate your user id and SUNY ID.

- <https://www.suny.edu/time>

If EduPerson has been established at the campus, employees will simply sign into the link above and entering their existing user id and password. The verification process is not necessary.

TAS is available 7 days a week, 24 hours a day and can be accessed from any computer.

TAS Home Page:

The screenshot shows the SUNY Secure login page for the Time & Attendance System. At the top, there is a navigation bar with 'SUNY SECURE' on the left, 'Welcome: [User Name] Campus: [Campus Name]' in the center, and 'Return to Employee Portal' and 'Sign Off' on the right. Below this is a large blue banner with 'The State University of New York | Time & Attendance' and a 'Home' link. A dark blue navigation bar contains a 'Menu' button, 'TAS Home', and the date/time 'Friday, December 14, 2012 • 2:41:21 PM'. Below the navigation bar, the user's name 'Jane Doe' is displayed, along with 'Sunny ID: 000001' and 'Local Campus ID:'. A section titled 'Employment Roles' contains a table with columns for 'Status', 'Role Type', and 'Effective Dates'. The table shows one role: 'Regular State Employee' with a status of 'Current' and effective dates of '12/06/2001 - [No End Date]'. Below the table, it says 'Displaying single result.' At the bottom of the page, there are two buttons: 'Time and Attendance' and 'View Paycheck'.

Status	Role Type	Effective Dates
Current	Regular State Employee	12/06/2001 - [No End Date]

Select Current Employment Role

Click on Time and Attendance button to work on your Time Record or Time off Request.

If you wish to view your paycheck click the View Paycheck button. Paycheck information will be available the Monday before payday.

Facilitator Search:

Employee Search

Search

Wild card searching is available for the First Name and Last Name fields:

- Enter a question mark (?) to match any single character.
- Enter an asterisk (*) to match any number of characters.
- Note= Wild cards can not be used as the first character in the field.

<u>C</u> ampus (a) :	<input type="text" value="28650: System Administration"/>
<u>S</u> uny ID:	<input type="text"/>
<u>L</u> ast Name:	<input type="text"/>
<u>F</u> irst Name:	<input type="text"/>
<u>P</u> erson ID (SSN/ITIN):	<input type="text"/>
<u>N</u> egotiating Unit:	<input type="text" value="Select ..."/>
<u>A</u> ccrual Type:	<input type="text" value="Select ..."/>
<u>D</u> ePARTMENT:	<input type="text" value="Select ..."/>
<u>S</u> upervisor:	<input type="text" value="Select ..."/>
<u>A</u> ctive/ <u>I</u> nactive:	<input type="radio"/> Yes <input type="radio"/> No
<u>D</u> elinquent Time Record:	<input type="text"/> (mm/dd/yyyy)
<u>P</u> ending Time Record:	<input type="text"/> (mm/dd/yyyy)

(Note: Pressing <Alt> and an underlined character will focus the cursor on the associated form field.)

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Facilitators have a variety of search criteria to look up employees (shown above). Also able to enter multi-search criteria, such as Department and Supervisor.

- SUNY ID
- Last/First Name
- SSN/ITIN
- Negotiating Unit
- Accrual Type
- Department
- Supervisor
- Active/Inactive – employees
- Delinquent Time Records
- Pending Time Records

Once the search results are returned, click the radio button of employee you wish to work on.

To Add a New Employee:

There are two options to add an Employee.

- 1) Enter SUNY ID, Name or any of the above search features shown above to look up the employee and click submit.

Search Results							
Name	SUNY ID	Accrual Type	Negotiating Unit	Department Supervisor	Last Timesheet		
<input type="radio"/>				System Administration	Human Resources		
Displaying single result.							
Details		Update		Add			

Once the employee is brought back, select the radio button next to the correct name and click on Add (shown above).

Basic Employee and Employment information will be displayed at the top of the screen (shown below). This information is coming from SUNY HR Employment.

Employee Information Details							
Employment Summary							Include History
Select	Effective Date	Type	Neg. Unit	Title	Pay Basis	Appt. Percent	Obligation
<input checked="" type="radio"/> Current	07/05/2012	A	13	Assistant Director	ANN	100	CA
<input type="radio"/> History	02/07/2008	A	13	Senior Personnel Associate	ANN	100	CA

[View Details](#)

Employment Detail			
Appointment Effective Date:	07/05/2012	Title:	Assistant Director
SUNY Anniversary Date:	12/06/2001	# of Courses Taught:	
Title Obligation:	CA	Over 40 Hours Compensation:	
Pay Basis:	ANN	Term Date:	
Negotiating Unit:	13	Veteran Status:	N
Employment Status:	Active	Volunteer Firefighter or EMT:	N
Appointment Percent:	100	Accrual/Leave Type:	

Facilitators will need to complete the Initial Balance section for any new hires, rehires, concurrent hires. Screen print below of required information to be entered.

If employee has holiday/floater balance, you will also need to go under the Mange Holiday tab and enter the corresponding holiday.

Initial Balances					
Vacation	Sick*	Family Sick Used	Floater	Holiday	Regular
0.0	0.0	0.0	0.0		0.0
Next Time Record Begin Date:		<input type="text"/>	(mm/dd/yyyy)		
* Record Effective Date:		<input type="text"/>	(mm/dd/yyyy)		
* Accrual Type:		Select ...			
* TAS Anniversary Date (b) :		<input type="text"/>	(mm/dd/yyyy)		
Personal Leave Date:		<input type="text"/>	(mm/dd/yyyy)		
Non-Accrual Begin Date:		<input type="text"/>	(mm/dd/yyyy)		
Non-Accrual End Date:		<input type="text"/>	(mm/dd/yyyy)		
General Employee Information					
Sick Leave Watch:		<input type="radio"/> Yes <input type="radio"/> No			
Holiday Pay Or Leave:		<input checked="" type="radio"/> Yes <input type="radio"/> No			
Voluntary Work Reduction:		<input type="radio"/> Yes <input type="radio"/> No			
Sick Leave Exchange:		Select ...			

(Note: Pressing <Alt> and an underlined character will focus the cursor on the associated form field.)

Next Time Record Begin Date is the first day of the month the employee will begin using TAS.

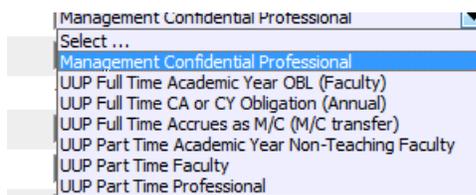
Record Effective Date is the date the Time and Attendance employment record takes effect. So, when an employee is first put in TAS, you would generally use the first day of the month that the employee will begin to use the system. When changing accrual type or make other changes on the employment record, the record effective date will be the date the change goes into effect. It is basically the same as the employment effective date in the employment system.

Time and Attendance System Anniversary Date is your anniversary date for time and attendance purposes. It is the date that is used to figure out years of service for accrual purposes and in classified service the date personal days will be accrued. For unclassified employees this date should reflect the 1st day of the month and classified employees should reflect state hire date, but it can be adjusted for breaks in service or leaves.

Non-Accrual Begin/End Dates: time frame in which employee will not be eligible to accrue. These dates do allow for mid month non-accrual periods. **Non-accrual period must be within the employee information effecting period. Cannot enter retro non-accrual dates.**

- ❖ Once the accrual type of UUP faculty has been established by the facilitator, the system will automatically sets the accrual time period from Sept - May. When their May time record is approved, the next timesheet date is set for September.
- ❖ All other employees that have sporadic non-accrual periods, will need to be entered into TAS.

Accrual Types are based on Negotiating Unit. Below is the list of types available from the drop down menu.



- ❖ For UUP employees the accrual rates are calculated based on years of service for full time employees or salary for part time employee. Therefore, if a UUP employee is going from full to part time or vice versa (also, from professional to faculty) you will need to change the accrual type (see drop down menu for options).
- ❖ For MC employees the accrual rate is calculated based on appointment percent. Therefore, the system is able to automatically calculate the accrual rate and no changes to the accrual type are necessary.

General Information can be entered on the employee if campuses choose to track employees that are on Sick Leave Watch, Voluntary Work Reduction, etc. These fields default to NO and can only be viewed by the campus facilitator.

Facilitators can also track employees that are on Military Leave. To do so, you would need to update the Employee Information page, enter the effective date of when the employee goes out on Military Leave and change the Military Leave radio button to Yes. This will open up the Military Leave column on the employees time record for the accruals to be charged.

Gets Notifications field, will default to YES. This will ensure the employee will receive notifications once EduPerson has been established at the campus. If employee does not wish to receive notifications, the campus facilitator can change it to NO.

- ✓ Click on Submit to save employee information and complete the set up process for the employee. The employee is now established in TAS and can begin using the system.

Facilitator Work Roster:

- 2) The other option to add an employee is from the Facilitator Work Roster (highlighted below).



The Work Roster will display any transactions that have been entered into SUNY HR Employment that may affect an employee's time and attendance information (such as; hire, rehire, concurrent hire, percent change or position change into a different negotiating unit).

The facilitator work roster can be sorted by Employee, Effective date or Negotiating Unit by clicking on the column headers.

Facilitators can select the "work on" function under the employee name. This function will bring up the employee's TAS information page. As noted in the above section, from this screen facilitators are able to enter and/or change the employee's time and attendance information, such as dates, balances, accrual type, etc.

- ❖ If no action is need on an employee that appears on the work roster, click on the delete box and hit submit.

Campus Rules:



Campus Rules MUST be set up before your campus begins using TAS. Click on Campus Rules function from the tool bar (highlighted above). This will allows campuses to set general Campus Policies; such as campus calendar based on negotiating unit and negative balance policy.

To set your calendar, click on the Campus Calendar option (highlighted below).

Campus Maintenance	
General Campus Policies	
Click to alter your Campus Holidays: Campus Calendar	
Negative Balance Policy	
Allow Negative Balances:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Unclassified: # of Days:	<input type="text" value="0"/>
Classified: # of Hours:	<input type="text" value="0"/>
<small>(Note: Pressing <Alt> and an underlined character will focus the cursor on the associated form field.)</small>	
<input type="button" value="Submit"/> <input type="button" value="Reset"/>	

The calendar will open up to allow campuses to indicate when each holiday is observed by negotiating unit and whether or not it is a Floater (shown below).

Holiday Year drop down, allows facilitators to select to view a different calendar year.

Once calendar is complete, click on submit. This will set the holidays on the employee's Time Record so action can be taken by the employees as needed.

Campus Holiday Schedule								
Holiday Year								
2011 <input type="button" value="Change Year"/>								
Holidays								
Holiday	Date Occurs	Obs. Date	C/SEA Obs. Date	PEF Obs. Date	UUP Obs. Date	MC Obs. Date	SECURITY Obs. Date	Floater?
New Year's Day	01/01/2011	<input type="text"/>	<input type="radio"/> Y <input type="radio"/> N					
Martin Luther King Day	01/17/2011	<input type="text"/>	<input type="radio"/> Y <input type="radio"/> N					
Lincoln's Birthday	02/12/2011	<input type="text"/>	<input checked="" type="radio"/> Y <input type="radio"/> N					
President's Day	02/21/2011	<input type="text"/>	<input type="radio"/> Y <input type="radio"/> N					
Memorial Day	05/30/2011	<input type="text"/>	<input type="radio"/> Y <input type="radio"/> N					
Independence Day	07/04/2011	<input type="text"/>	<input type="radio"/> Y <input type="radio"/> N					
Labor Day	09/05/2011	<input type="text"/>	<input type="radio"/> Y <input type="radio"/> N					
Columbus Day	10/10/2011	<input type="text"/>	<input type="radio"/> Y <input type="radio"/> N					
Election Day	11/08/2011	<input type="text"/>	<input checked="" type="radio"/> Y <input type="radio"/> N					
Veterans' Day	11/11/2011	<input type="text"/>	<input type="radio"/> Y <input type="radio"/> N					
Thanksgiving Day	11/24/2011	<input type="text"/>	<input checked="" type="radio"/> Y <input type="radio"/> N					
Christmas Day	12/26/2011	<input type="text"/>	<input type="radio"/> Y <input type="radio"/> N					
<small>(Note: Pressing <Alt> and an underlined character will focus the cursor on the associated form field.)</small>								
<input type="button" value="Submit"/> <input type="button" value="Cancel/Return"/>								

Negative Balances:

Negative Balances, allows facilitators to set whether or not the campus allows for negative balance in the field indicated below. This indicator defaults to NO.

Negative Balance Policy	
Allow <u>N</u> egative Balances:	<input type="radio"/> Yes <input checked="" type="radio"/> No
<u>U</u> nclassified: # of Days:	<input type="text" value="0"/>
<u>C</u> lassified: # of Hours:	<input type="text" value="0"/>
<small>(Note: Pressing <Alt> and an underlined character will focus the cursor on the associated form field.)</small>	
<input type="button" value="Submit"/> <input type="button" value="Reset"/>	

If changed to yes, enter the negative number of days allowed for unclassified or number of hours for classified employees.

- ✓ Click on Submit.
- ❖ If negative balance is not allowed at your campus and an employee's accrual balance go into a negative amount, the employee will receive an error message that a negative balance is not allowed when they try to submit their time record.

Updating Employee Information – when the employee already exists and using TAS.

The balance section is only key able when the employee is first added into TAS or the employee information is the only one in the stack and is still updateable (no approved time records). After time records have been approved, any corrections to the balances must be made through Adjust Balances.

Changes to employee information is only allowed if the effective date of the change (accrual type, non-accrual date, etc) does not encompass any approved time records. If there are approved time records with this time frame, adjustments will need to be entered. All future employee information will be updateable.

To add or update this information, you would click on the radio button under the TAS Employee Information Summary. If you are allowed to update the current information, the update button will be available. Otherwise, it will be grayed out and your only option is to add a new row. This concept mimics how campuses are allowed to stack rows in SUNY HR.

TAS Employee Information Summary											No History
Select	Effective Date	End Date	Accrual Type	Accrual Begin	Personal Leave Date	Non Accrual Begin Date	Non Accrual End Date	Sick Leave Watch	Work Reduction	Holiday Pay Leave	
<input type="radio"/>	12/01/2012		M/CPROF	12/01/2001				No	No	No	
<input type="radio"/>	04/01/2011	11/30/2012	M/CPROF	12/01/2001				No	No	No	

When adding or inserting a new employee information into the stack, the effective date needs to be greater than the end date of the last approved time record. For example:

- ❖ If an employee is changing accrual type effective 09/10/2012 but last approved time record is September 2012, the facilitator would need to enter the Record effective date as 10/01/2012 and then enter an adjustments necessary to the September time record.

If the time record is in pending or working status, facilitators will be able to update the employee information. However, because the current time record is being changed, any time charged entered directly on the time record will be deleted. Any Time off Request will remain on the time record regardless of status (Saved, Pending, Approved).

Record Effective date is required and must be prior to the effective dated row.

The next time records date is no longer key able. It is determined by the effective date, end date and any non-accrual periods. For example:

- ❖ If the record effective date is say 8/26/2012 and there is not a non-accrual period, then the next time record date will be for August 2012. If you don't want the employee to do an August time record, then the record effective date should be 9/1/2012.

Adjust Balances:

Facilitators have the ability to adjust an employee's accrual balances once the time record has been approved by the supervisor by entering the following information:

Adjust Balances

Adjustment Setup

* **Begin Date** (1): (mm/dd/yyyy)

* **End Date** (2): (mm/dd/yyyy)

* **Change:** Increase Decrease

* **Amount:**

* **Accrual Type:**

* **Reason:**

* **Apply To All Months?:** Yes No

Comments:

(Note: Pressing <Alt> and an underlined character will focus the cursor on the associated form field.)

Once the fields are complete, hit View Changes

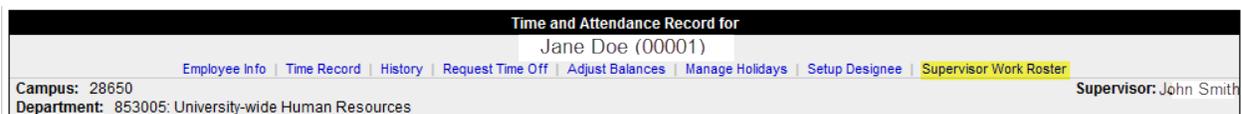
Adjust Balances

Keep	Name	Vacation	Sick*	Family Sick	Used Floater	Holiday	Reg. Holiday
<input checked="" type="checkbox"/>	2011-03,Now	25.25	72.25	0	2	0	
	2011-03,Prior	23.25	72.25	0	2	0	

(Note: Pressing <Alt> and an underlined character will focus the cursor on the associated form field.)

Notes:

- 1) Facilitators are automatic designees to approve and deny employee Time Records and Time Off Requests.
- 2) Facilitators have the ability to access Supervisor's Work Roster.
 - From the Facilitators Search screen, enter criteria (SUNY ID, Name, etc) of the supervisor you are accessing.
 - Once the supervisor's time record is brought up, a new link is displayed under the tool bar called, "Supervisor Work Roster" (highlighted below in yellow). Click to view the work roster.



- 3) Added Non-Employee Supervisor role in SUNY HR. This role will allow for any non-employee who have supervisor responsibility to access and process their employee time record and/or time off request in TAS. To add non-employee supervisor role:
 - In SUNY HR – Person - ADD New Role
 - Complete Person Legal Name and Identification
 - Role – choose Non-Employee Supervisor
 - Effective date and End date (if known)
 - Click on Employment to add non-employee and hierarchy information
 - If you already have employees set up in SUNY HR as volunteers that have supervisor capabilities, you must end the volunteer role and create a non-employee supervisor role. We are looking into providing a list of all volunteers at each campus to assist you in creating the new role.
- 4) Time Record over the max warning has been removed. This message will be displayed beginning in October through December.
- 5) If Time Off Request has been denied with required comments, the comments are now displayed under the Previously Submitted leave Request.
- 6) Facilitators have the ability on the Search page to enter and search by multiple criteria, such as Department and Supervisor.
- 7) PDF time record displays campus name.

- 8) Facilitators now have the ability to access and view separated employees accrual balances.
 - 9) All time off requests have a status indicator of:
 - S - saved
 - P - pending
 - A - approved
- ❖ The status appears on both the time off request and time record calendars indicating what status the day is in, along with an informational key under each calendar. If a time off request needs to be changed after it has been entered (saved, pending, or approved status), it is not modifiable unless it's deleted from the time off requests page.