eSTART

Course Guide for

Agency and Leave Administrators

August 2021

General Information About This Manual

This manual is designed to provide State employees with an overview of the eSTART Time and Attendance System. This manual provides basic procedures; however, you may need to seek clarification on specific agency procedures or rules from your agency personnel manager or supervisor.

Nothing in this handbook should be construed to amend any laws, regulations, policies or procedures established by the State of Alabama or specifically the Alabama State Personnel Department.

Certain procedures contained within this manual are subject to change or revision without prior notice. Employees will be notified as soon as possible when changes or revisions occur.

All leave accruals and usages in eSTART are estimates and/or projections that are based on the concept that all employees earn leave and have leave to use. These estimates and projections may not be accurate.

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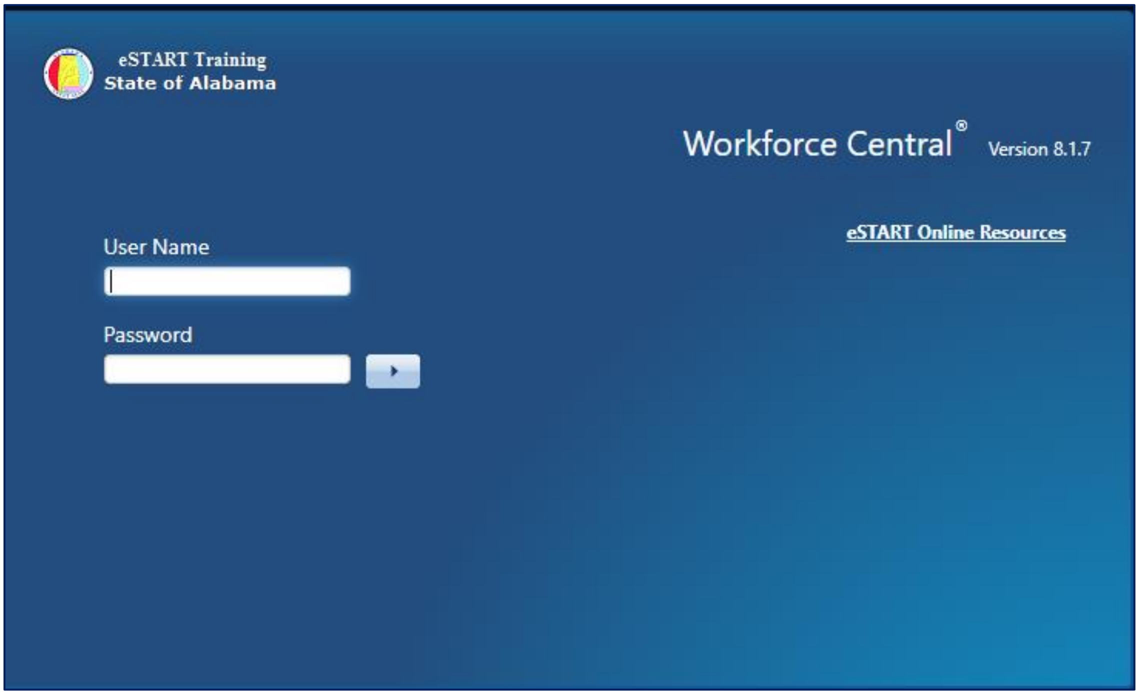
Log On and Workspaces

The eSTART log on page provides access to all the features of the eSTART application where you perform your administrator tasks.

Log on to the application.



Workspaces

The default workspace for an agency administrator or timekeeper will be the Agency Admin workspace. This view will display up to 5,000 employees. If your agency has more than 5,000 employees, HyperFind Queries may be created to retrieve a more manageable number of employees.

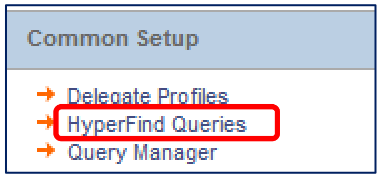
An agency administrator or timekeeper may also be a Leave Administrator. The default workspace for a dual role administrator will be the Agency Leave Admin workspace, which allows access to the Leave widgets. Although a Leave Workspace is provided on the **Add Workspaces (+)** tab as well as the **Employee Workspace**, the Leave functions are also available on the Agency/Leave Admin workspace for anyone who has a dual role.

Create HyperFind Query by Manager

HyperFind Queries are used to filter and retrieve lists of employees who meet a specific set of criteria, for example, all employees in a specific agency or division. In this example, we will create a query to retrieve all employees who report to John Manager and Junior Manager.

Creating a New HyperFind Query

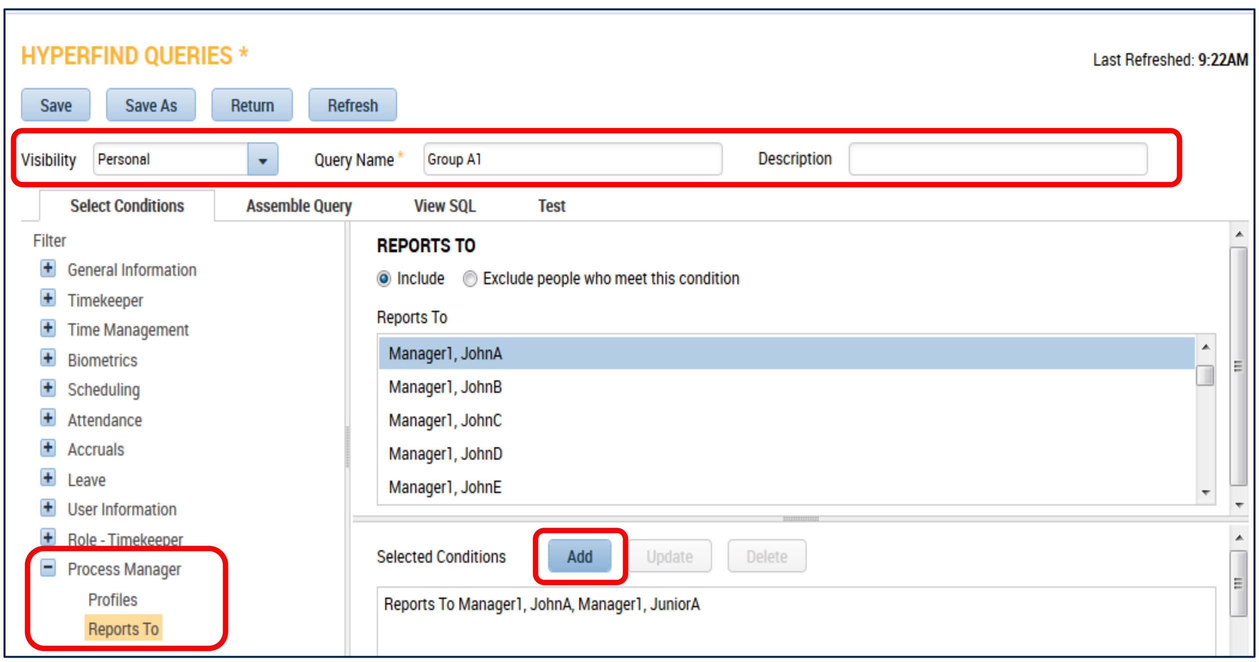
1. From the **Related Items** pane, select **Setup**, then select **HyperFind Queries**.



2. Select the **New** button. The **HyperFind Queries** screen displays.
3. Select **Personal** from the **Visibility** drop-down.

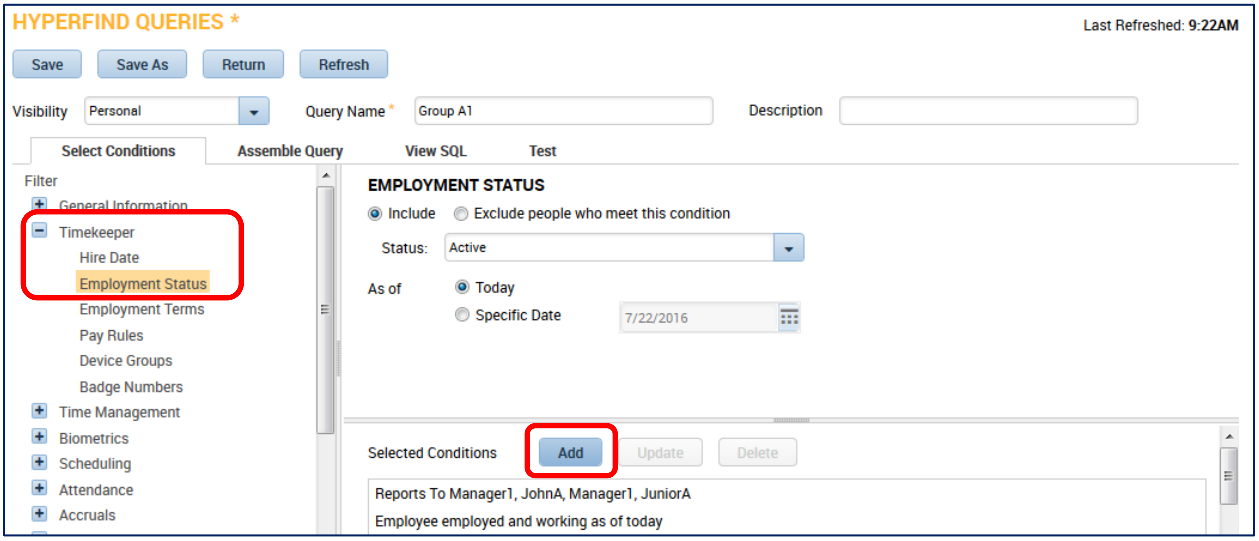
NOTE: Ad Hoc creates a temporary query. **Personal** creates a permanent query, visible only to the person creating it. This type of query may be shared with others. See steps in **Assigning a Personal HyperFind Query to Another Person** section below.

4. Enter the name of the new query in the **Query Name** field. The **Description** field is optional.

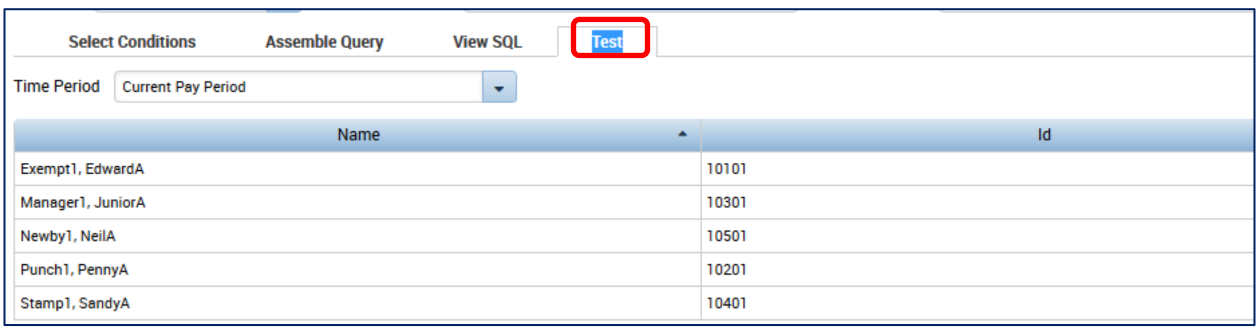


5. From the **Filter** menu, expand the **Process Manager** category. Select **Reports To.**
6. Select **John Manager** and **Junior Manager** from the list.
7. Select the **Add** button. The condition displays in the **Selected Conditions** window.
8. From the **Filter** menu, expand the **Timekeeper** category. Select **Employment Status**.

9. To have the query retrieve only employees who are active as of today, no changes are needed to the criteria. Select **Add.**



10. To test the query, select the **Test** tab. A listing of employees should display.



11. If the employee list is correct, select **Save**.

12. Close the **Setup** tab.

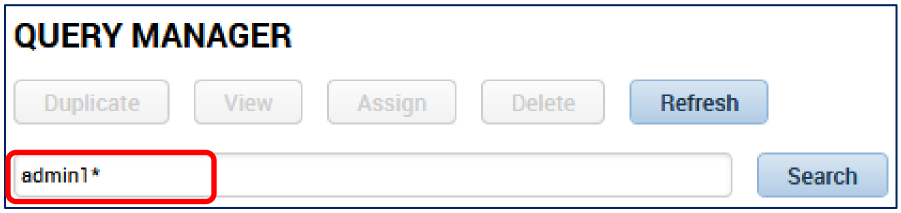
13. Click the refresh icon on the **Agency Admin** tab to update the HyperFind listing.

14. The new HyperFind Query may now be used to filter the employee listing.

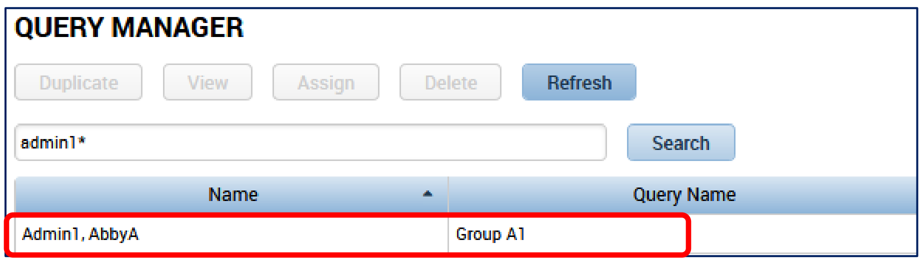
NOTE: If a public HyperFind query is needed, contact your eSTART Administrator.

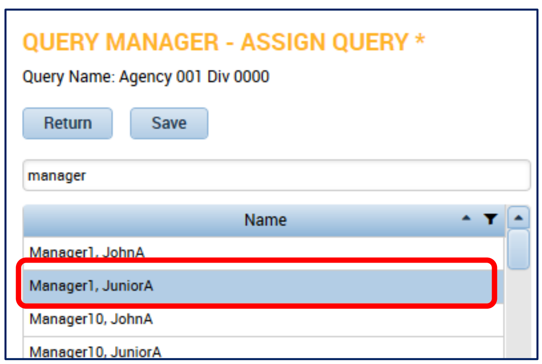
Assigning a Personal HyperFind Query to Another Person

1. From the **Related Items** pane, select **Setup**. Then select **Query Manager**.
2. Enter the last name of the person who created the HyperFind in the **Search** field and select the **Search** button.



3. Your list of personal HyperFind Queries displays. Select the query to be assigned, then the **Assign** button. The **Assign Query** window displays with a list of available names. A **Search** field is available to narrow the search, if needed.

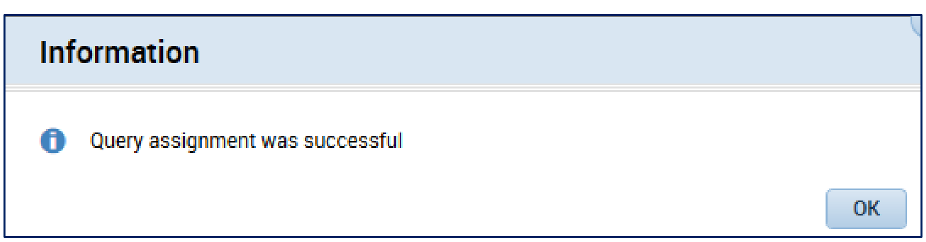




4. Select the name of the person to which the HyperFind is to be assigned.

NOTE: Hold down the **CTRL** key to assign the query to more than one person.

5. Select the **Save** button. The message below displays.



The assigned person now has access to the HyperFind from any of their Show drop-downs.

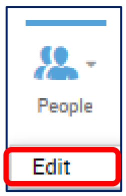
NOTE: The third option on the **Setup** page is for **Delegate Profiles**. This function is used for temporary delegations. For information on this function, see the instructions for **Delegate Profile Setup (Temporary Delegation)** in the **Appendix** section of this guide.

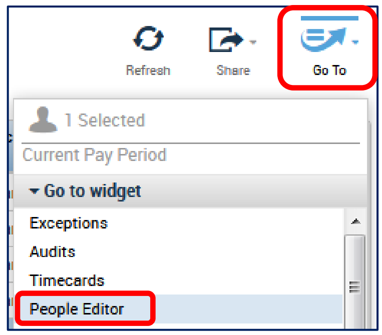
New Employee Updates

When a new employee record is added in the State's payroll system, a shell record is loaded to eSTART by a nightly interface. However, certain information will need to be manually updated by the Agency Administrator in eSTART.

Locate employee records

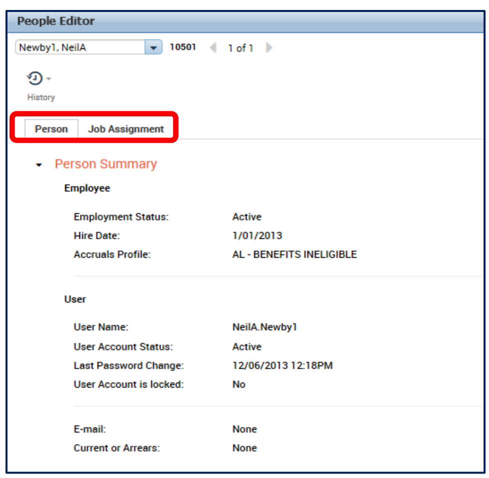
1. From any **My Views** widget or from **Related Items>Quickfind,** select the employee name(s). Then select either the **People>Edit** icon or **Go To>People Editor.**





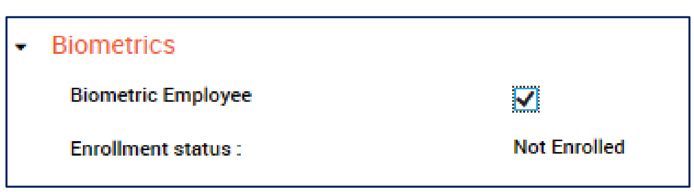
2. The **People Editor** page displays, as below.

NOTE: There are two tabs on this page: **Person** and **Job Assignment**. The available options on each tab may vary based on the access level of employee.



Edit employee records

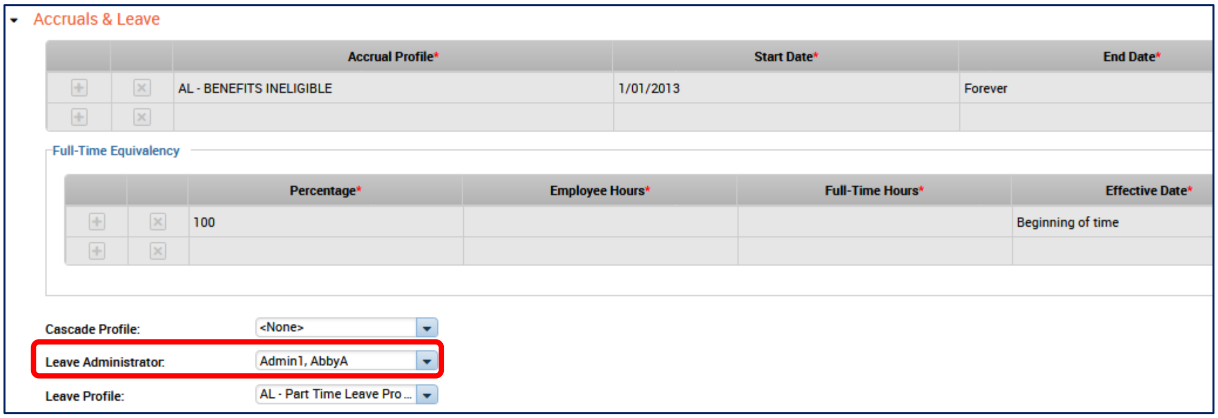
1. If the employee will use a time clock to record time, select the **Biometrics** link from the **Person** tab on the screen above. Then select the **Biometric Employee** check box. If employee will not use time clock, skip to the next step.



2. Select **Accruals & Leave** link.

   Each employee should be assigned a Leave Administrator.

   a. To assign a Leave Administrator to the employee, open the **Leave Administrator** drop-down and select the Leave Administrator's name.

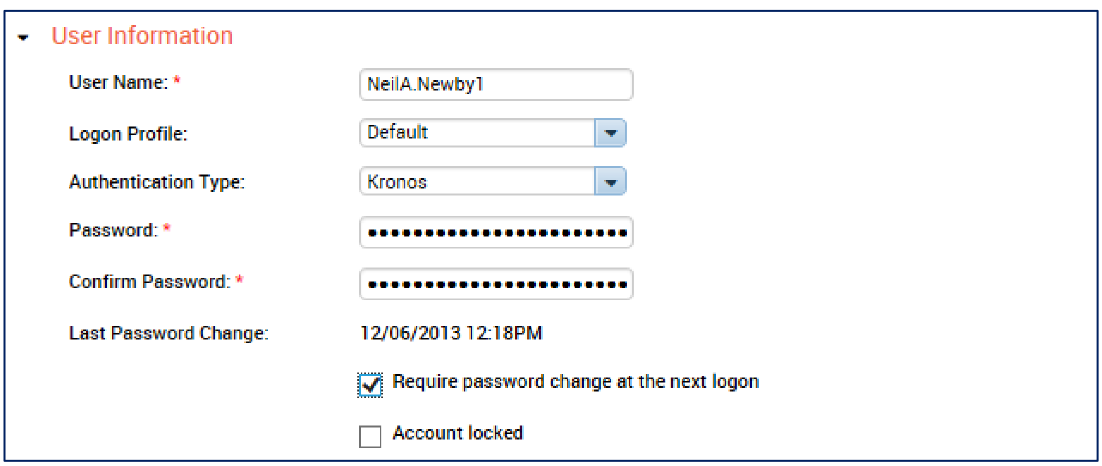


3. Select the **User Information** link.

   a. When the employee is initially loaded in eSTART, the User Name will be set to firstname.lastname.

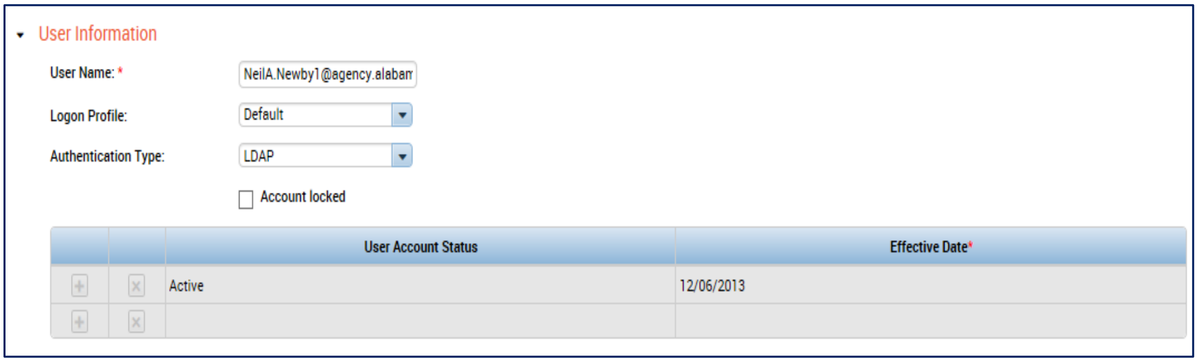
   b. An initial password will be populated in the **Password** field by an interface. The initial password will be **P@ssw0rdxxx** (xxx = your agency number).

   c. If the employee does not have an Active Directory ID, the assigned Logon ID and password will be used.

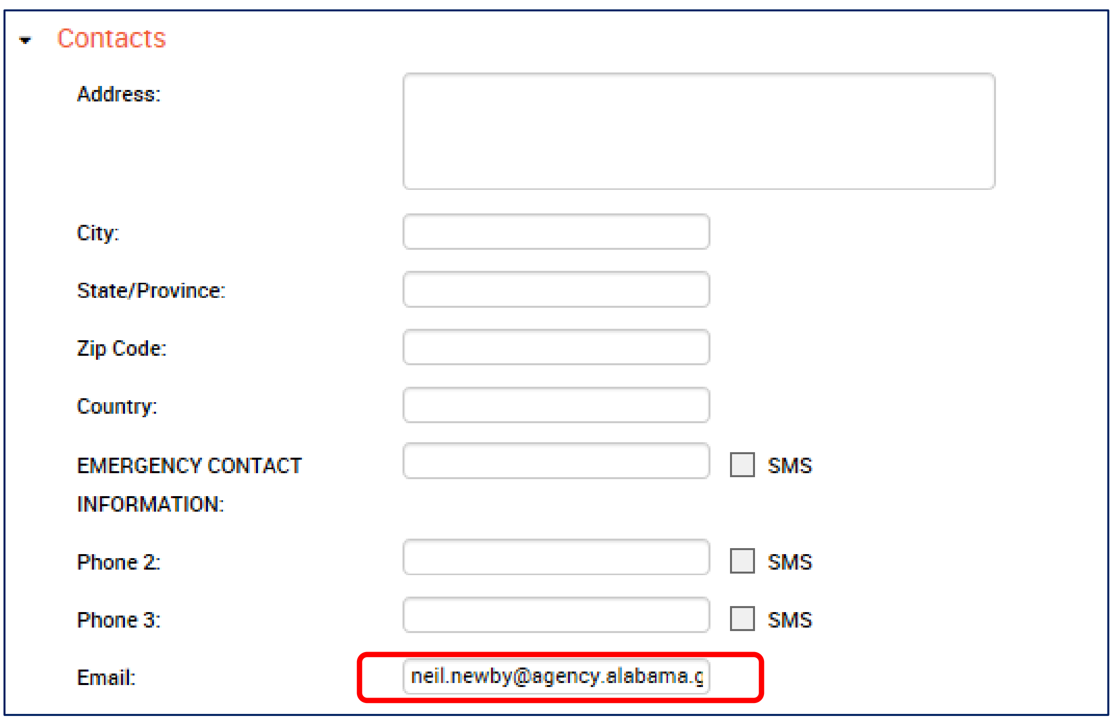


d. If the user has an Active Directory ID (usually an email address), change the User Name to the employee's email address, i.e. neil.newby@agency.alabama.gov.

e. Select **LDAP** from the **Authentication Type** drop-down. The user's password will be their network password.



4. Next, select the **Contacts** link. If the employee has an Agency email account, the email address should be present in the **Email** field. If it is not present, it must be added.



5. Select the **Additional Information** tab and key the required information in the fields below for the new employee:
   a. **Current or Arrears – LEAVE FIELD BLANK – DO NOT KEY**
   b. **OT or Comp** – If the employee is non-exempt and has been approved for overtime, key **OT** in this field. Otherwise, it will default to **Comp**. The field will be blank for Exempt employees who do not earn OT or Comp.
   c. **Lunch Length** - (0, 30, 45, 60 or 90) – the length of the employee's lunch time.
   d. **Schedule Type** - See the legend below for the values of this field.
      - **8 – 8-hour employee – Traditional Schedule**
      - **8N – 8-hour employee – Non-Traditional Schedule**
      - **8PI – 8-hour Exempt employee who punches IN ONLY***
      - **8PA – 8-hour Exempt employee who punches IN and OUT****
      - **9 – 9-hour Non-Traditional employee**
      - **10 – 10-hour Non-Traditional employee**
      - **12 – 12-hour Non-Traditional employee**
      - **24 – 24-hour Non-Traditional employee**
      - **8PIR, 8NPIR, 10PIR, 12PIR – Punch in Restriction*****
   e. Key the **Approver ID** (employee ID) of the employee's manager.

Additional Information	
Current or Arrears	
OT or Comp	
Lunch Length	60
Schedule Type	8
Approver ID	10001

*__8PI__ - The **Punch In** feature is used to allow exempt employees to punch in at the start of their shift <u>only</u>. They will not be required to punch in or out any other time of day. <u>The employee would remain assigned to an **auto deduct (auto PFS) lunch**</u>**,** such as the one below, so that eSTART would continue to populate the remainder of their time.

0800am – 0500pm L60 Auto PFS

__8PA__ - For exempt employees who will punch in and out at the beginning and end of their shifts, as well as in and out for lunch, their **Schedule Type** setting will be **8PA**. <u>Employees who will punch all their time (8PA) **must** be assigned to a schedule with a **lunch start time**</u>**,** such as the one below**:**

0800am – 0500pm L60 12-00

*****Punch in Restriction –** Prevents a non-exempt or hourly employee from punching in more than 7 minutes before the <u>start of their shift</u>. However, the agency must be set up to allow this restriction, so access must be requested.

The remaining fields in the table are either optional or informational.

Manager Access Group	12345,67890
GHRS Info	PP: ESMAR; LVP: PELBL; PC: SMREG
Attestation Profile	
L Status Dates	
S Status Dates	
SEP Program - DOC Only	
Last Sign Off Removal Request	
Last Sign Off Removal Status	
Remove Sign Off - P C or B	
Passport	
MH Only - Nurse Shift 1 2 or 3	

f. **Manager Access Group –** This optional field is used for establishing a permanent Delegate Manager and is covered in a later section of the manual. This is a two-step process.

   Key the Employee ID number(s) of the manager(s) whose employees are being delegated. More than one ID may be keyed, but no more than 11 are allowed. The ID(s) should be keyed in the format below, with a comma separating each number and no spaces: i.e. 12345,56789,90123.

g. **GHRS Info** – The data in this field is obtained from the payroll system and is informational only. The data will vary based on the employee type or a portion of the field may be blank. If it is changed or deleted, it will repopulate overnight. Below is an explanation of each populated item.

   PP (Pay Policy): SMARS; **LVP** (Leave Policy): ELBL; **PC** (Pay Class): SMREG; **FLSA** (FLSA Code): NORMAL: **ALG** (Annual Leave Grant).

h. **Attestation Profile –** not applicable.

i. **L Status Dates** - A date in this field indicates the employee is in L status (long leave) in GHRS.

j. **S Status Dates** – A date in this field indicates the employee is in suspended status in GHRS.

k. **SEP Program – DOC Only** - not applicable in most agencies.

l. **Last Sign Off Removal Request** – This field contains the user name, date/time and request type (P, C or B) of the last requested sign-off removal.

m. **Last Sign Off Removal Status –** Contains the request status of the last requested sign-off removal, including the failure reason if applicable.

n. **Remove Sign Off – P C or B** – Enter one of the following codes in this field to have sign-off removed from the employee's timecard.

   P – to remove sign-off for **Previous Pay Period.**

   C – to remove sign-off for **Current Pay Period**.

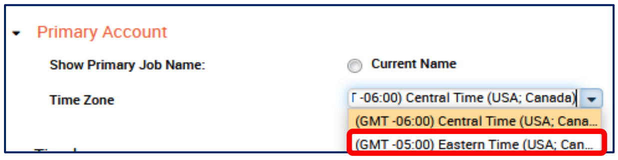
   B – to remove sign off for <u>both</u> **Current** and **Previous Pay Periods.**

NOTE: See the **Automated Sign-Off Removal** instructions in the **Appendix** section of this guide for further information regarding this function.

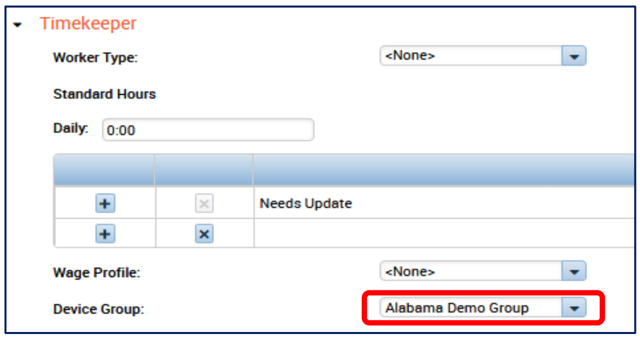
o. **Passport** - not applicable in most agencies.

p. **MH Only – Nurse Shift 1 2 or 3** – not applicable in most agencies.

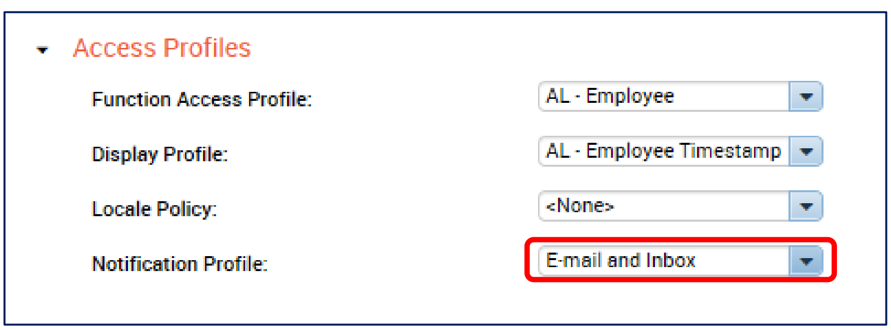
6. Select the **Job Assignment** tab.
7. Select the **Primary Account** link if the employee will work from the Eastern time zone rather than Central. Else, skip this step.
    a. Open the **Time Zone** drop-down and select the correct time zone.



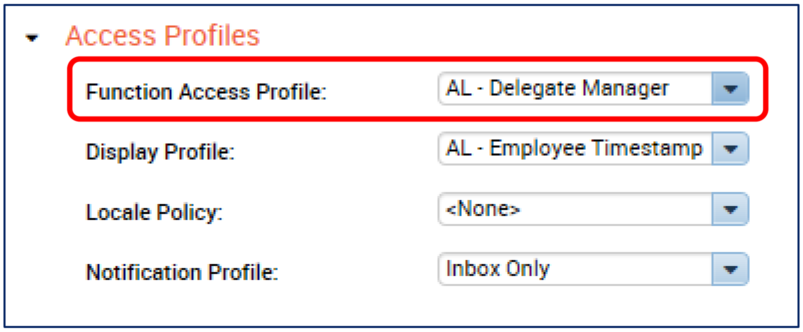
8. If the employee will record time from a time clock, select the **Timekeeper** link**.** If the employee will not use a time clock, skip this step.
    a. Select the time clock device from the **Device Group** drop-down.



9. To allow external email notification for the employee, select **Access Profiles**.
    a. If the employee uses an Agency email account, choose **E-mail and Inbox** from the **Notification Profile** drop-down**.**
    b. If the employee does not have an Agency email account, choose **Inbox Only**.



    c. If assigning a delegate manager, select **AL-Delegate Manager** from the **Function Access Profile** drop-down above. This is step 2 of assigning a permanent delegate manager.

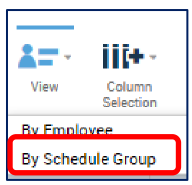


NOTE: For further information, see the **Delegate Manager Setup (Permanent Delegation)** job aid in the Appendix section of this guide.

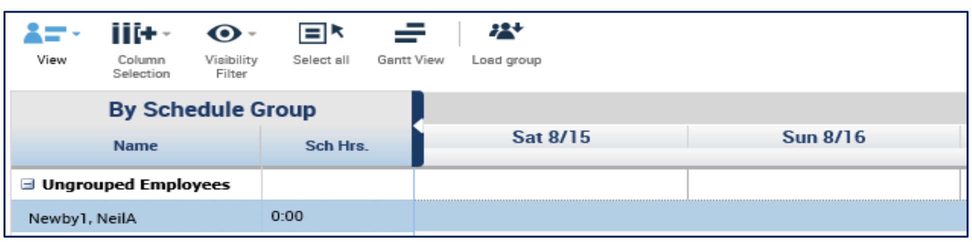
10. **Save** the changes.

NOTE: The update will require an overnight cycle to become effective. Employees who will use a time clock may be enrolled on the clock the following day.

11. Link to **Schedule Editor** from the **Go To** menu or go to **Related Items>Schedule Editor** to add a work schedule for the employee. The **Schedule Editor** page displays.
12. Select **View>By Schedule Group**.



The **By Schedule Group** page displays.

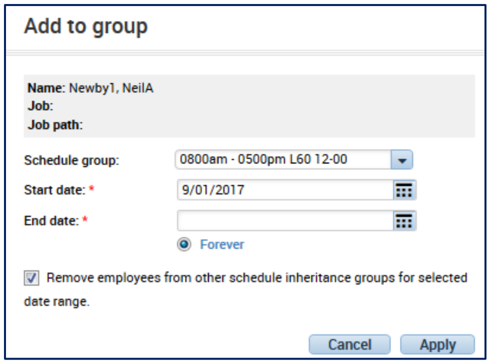


Schedule Groups allow multiple employees to be assigned the same work pattern. The pattern is assigned to the group and applied to all employees within the group.

If the employee will have a regular schedule, it is best to add them to an existing group. Contact your eSTART Administrator if a new group is needed.

13. Set the Time Period with the start date of the schedule.
14. Highlight the row with the employee name.

15. Right-click on the employee name and choose **Add to Group** from the menu. The window below displays.



16. Select the new **Schedule Group** assignment. Edit the **Start Date** and **End Date** if needed**.**

NOTE: Non-exempt employees must be assigned to a schedule group with a specific lunch time, such as **0700-0400pm L60 12-00**. “L60” refers to the length of the lunch time. There are also groups with 30-minute lunches, which will be denoted as “L30”. The “12-00” refers to the start time of the lunch. There are existing groups with varying lunch start times in the list, such as 11:15 or 12:30. The groups ending with **Auto-PFS** are to be used for **FLSA exempt employees <u>only</u>**.

17. The **Remove employees from other schedule inheritance groups for selected date range** check box remains selected. Click **Apply** and **Save** the page.

Updates to Existing Employee Records

Transfer In

- Employees transferring into an agency will not be viewable via eSTART until all the documentation has been processed through State Personnel and their information has been updated in the payroll system.
- Set up the transferred employee in their new agency using the **Edit Employee Records** section.

Transfer Out or Separation of Service

- The **employee and manager should approve the final timecard** as soon as the employee completes his last hours with the agency. The **Agency Administrator <u>must</u> sign-off** on the timecard **no later than the next business day**.

NOTE: Failure to immediately sign-off may result in the last timesheet and leave event not being processed accurately. These must be manually corrected in the payroll system.

IMPORTANT! DO NOT update an employee's timecard for any pay period following their last day at the agency. This will be the responsibility of the current agency.

Also, if an employee's separation is updated in the payroll system **<u>before</u>** the timecard is signed off, the **Terminated Employees** HyperFind query must be used to locate the employee.

NOTE
An individual timecard may be signed off before the end of the pay period, if necessary.

Changing from Non-Exempt Employee to Exempt

When an employee's pay rule is changed from non-exempt to exempt, the change must be updated and approved in the payroll system. Once this is done, the interface will update the employee's information in the People Editor.

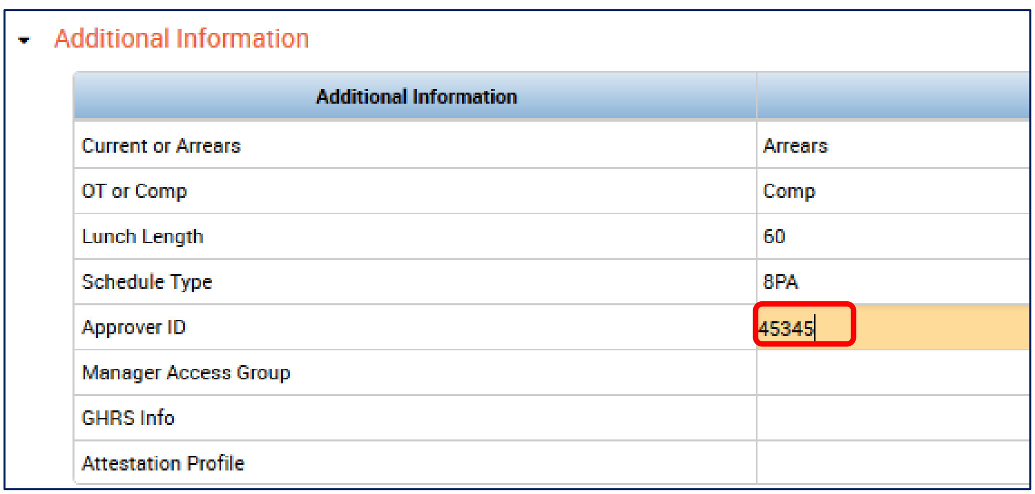
- If the exempt employee will not punch his time:
  - The schedule **must** then be changed to reflect an **auto deduct (auto PFS) lunch**. The employee would need to be assigned to a schedule similar to this one: **0800 – 0500pm L60 Auto PFS**.
- If the exempt employee will punch his time, follow the instructions in the **Edit Employee Records>Additional Information** section above.

Promotion to Manager or Change to Manager's Direct Reports

When a person is promoted to manager, or when the manager's direct reports change, the manager's **employee ID** must be keyed on the **People Editor** for *each* employee. If the ID is not changed, the employee will continue to display in the employee listing of the current manager.

NOTE: Both managers will continue to see the employee in their listing for the pay period in which the ID was changed.

1. In the **People Editor**, from the **Person** tab, select **Additional Information**.
2. Key the **Approver ID** (employee ID) of the employee's new manager.



NOTE: It is **NOT** necessary to change the Access Profile in the People Editor of the new manager. eSTART will automatically set this field and update the employee's manager assignment during the overnight processing cycle.

My Views

Widgets from the **My Views** listing are "customized online reports" that are useful for viewing timecard and employee information. This information has been separated into different views to allow specific information to be retrieved. The columns may also be sorted to filter certain information to the top or bottom of the list. The **Employee Information View** is the default for the list.

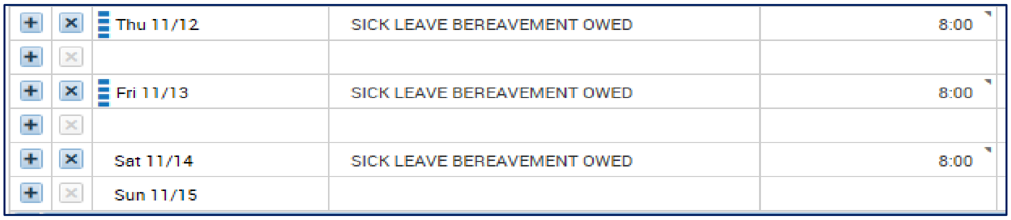
- **Employee Information View –** provides information pertaining to the Name, ID, Pay Rule, Labor Account, Hire Date, Employment Terms, Current/Arrears, Schedule Group and Assigned Manager. It is information from the People Editor that is most needed.
- **Accrual Balance View –** provides Name, Hire Date and accrual balances for Annual Leave, Sick Leave, Excess Annual Leave, Personal Day and Excess Sick.
- **Employee Hours View –** provides Name, ID and Pay Rule, contains their Regular and Non-Worked Hours totals, as well as OT and Comp time totals for the Time Period selected.
- **Employee Holiday Credit View –** provides basic Name, ID and Pay Rule information, as well as Holiday Taken and Holiday Earned totals. The Holiday Taken column is for non-exempt employees. The Holiday Taken-Exempt column contains the totals for exempt employees.
- **Custom Field Reporting View –** retrieves information from the Person>Additional Information section of the People Editor. It contains Name, ID, Pay Rule, Schedule Group, Lunch Type, Employee Type, Approver ID, Current/Arrears and OT/Comp.
- **Bereavement Leave View –** provides the Name, ID and Pay Rule, as well as the employee's total amount of Bereavement, Annual, Personal and Sick leave taken during the selected date range.
- **Biometric Status View –** provides information about employee enrollment on a timeclock. This view shows the Biometric status, Enrollment Verification, Enrollment **I**dentification, Primary Finger Enrollment Location, Primary Finger Threshold and Manager.
- **Leave Cases View –** used to review case information pertaining to employees on extended leave.
- **Leave Hours View –** used to review leave hours pertaining to employees on extended leave.
- **On Premises –** used to verify whether nonexempt employees are on location. A check mark in the **On Premises** column indicates the employee is currently at work.

There are several other widgets in the **My Views** drop-down list that are useful for viewing information about your employees.

Bereavement Leave

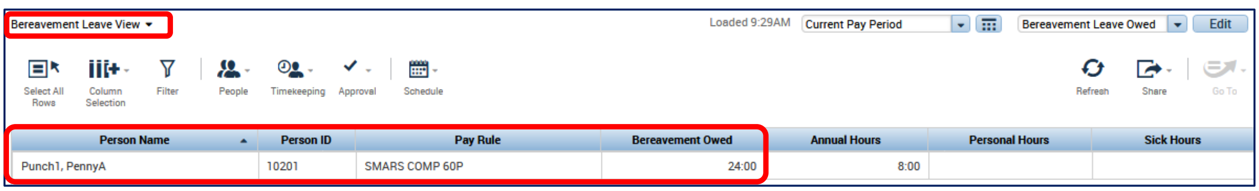
When an employee takes leave for bereavement and does not have a sufficient sick leave accrual balance, the appropriate bereavement payback agreement document must be completed by the employee and forwarded to the Timekeeper/Agency Administrator.

The Timekeeper/Agency Administrator will add the **SICK LEAVE BEREAVEMENT OWED** pay code to the employee's timecard. The amount owed will display a negative balance in the employee's accruals until the balance is paid back.

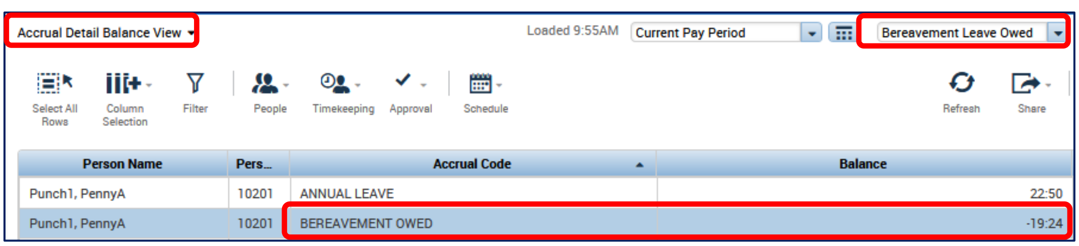


The bereavement time will then be paid back based on the payback agreement established by the agency. Bereavement payback will continue to be handled in the payroll system. The totals will be updated in eSTART through an interface from the payroll system.

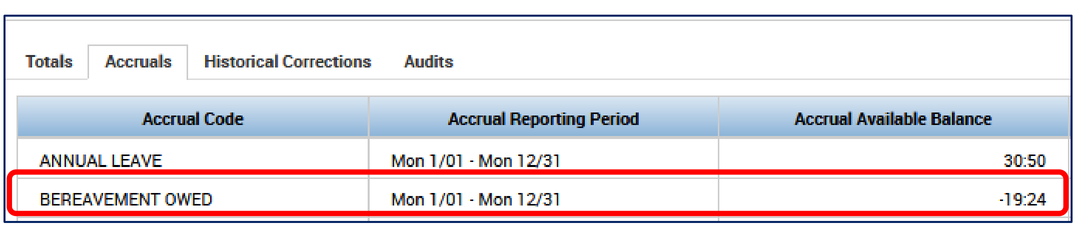
NOTE: The **Bereavement Leave View** may be used to view any bereavement leave *taken*, not the Bereavement Owed balance, during the time period selected. The additional columns also show leave *taken* during the time period.



Also, the **Accrual Detail Balance View** or the **Accrual Reporting Period View** may be used to view employees who have a bereavement *owed* balance. Select the **Bereavement Leave Owed** HyperFind to retrieve these balances.



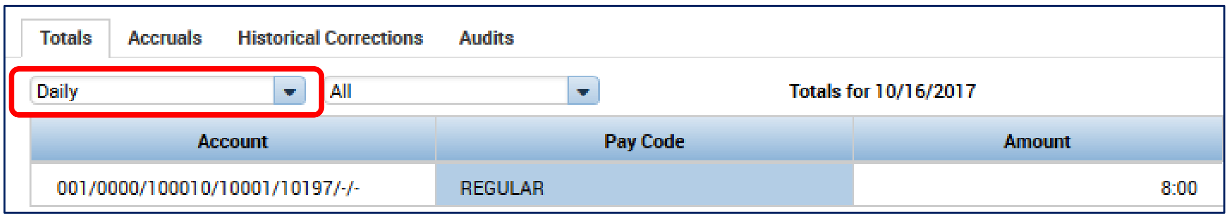
Bereavement Owed balances also display in the listing of employee accrual balances in the lower section of the timecard.



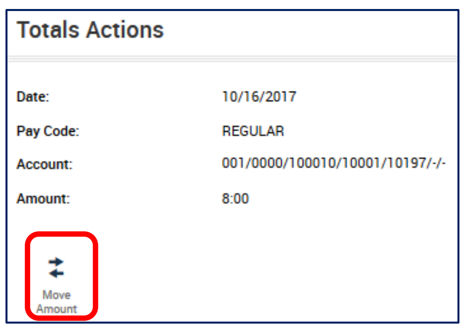
Move Amounts

Part-time, semi-monthly workers have a pre-determined number of regular work hours for each payroll cycle. On occasion, they may work additional hours or have extra hours due to the number of work hours in the pay period. These additional hours must be moved to a different pay code to post correctly in the payroll system.

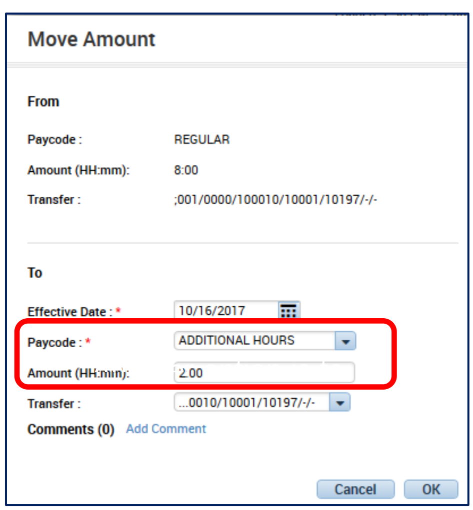
1. From the employee timecard, select the correct pay period.
2. Highlight the date row in the timecard for the hours you want to move.
3. From the **Totals** tab, select **Daily** from the drop-down menu.



4. Right-click on the Pay Code to be moved, **Regular** in the example above. The window below displays.



5. Choose **Move Amount.** The **Move Amount** window displays.
6. Select the **Additional Hours** pay code.



7. Enter the number of hours in the **Amount** field. These are the additional hours over the generated hours in the payroll system for the pay period.
8. Verify the **Effective Date** and **Transfer** field, if applicable.
9. Select **OK**.
10. Select **Save**.

11. Select **Refresh.**

12. To verify, highlight the **Date** row again in the timecard.

Totals | Accruals | Historical Corrections | Audits

Daily | All | Totals for 10/16/2017

Account	Pay Code	Amount
001/0000/100010/10001/10197/-/-	ADDITIONAL HOURS	2:00
001/0000/100010/10001/10197/-/-	REGULAR	6:00

13. From the **Totals** tab, select **Daily** from the drop-down menu. The **Additional Hours** pay code and time should display correctly in the pane.

The moved amount transaction will also display in the Audits log.

- To view, click on the **Audits** tab in the timecard, or select **Go To>Audits.**
- Select **Moved Amounts** from the **Category** drop-down.

Totals | Accruals | Historical Corrections | Audits

Moved Amounts

Effective Date	User	From Account	To Account	From Pay Code	To Pay Code	Amount	Comment	Note
10/16/2017	AbbyA.Admin1:e...	...)010/10001/10197/-/-	...)010/10001/10197/-/-	REGULAR	ADDITIONAL HOURS	2:00		

NOTE: For part-time, semi-monthly employees who work fewer than their specified hours for the pay period, the non-worked hours should be added to the timecard using the pay code for **Leave Without Pay** to prevent overpayment.

Board Meeting Pay Code

A **Board Meeting** pay code is available to allow an agency to enter the amount of pay for its board members.

The board members will display in your employee listings when using **All Home and Transferred In** from the Show drop-down. Sort by clicking on the **Pay Rule** column header to sort the board members to the top of the listing. Then select them and choose **Go To>Timecards.** Also, there is a separate HyperFind in the Show drop-down for **Board Members** that may be used if desired**.**

1. From the Show drop-down, select **Board Members**.

   Board Members

2. Choose the **Board Meeting** pay code from the drop-down list on the date the meeting was held.
3. In the **Amount** column, key the **AMOUNT OF PAY.** A decimal should be entered in the field to reflect a dollar amount. For instance, $50.00 should be keyed as 50.00 in the Amount column.

Wed 11/18		
Thu 11/19	BOARD MEETING	$50.00
Fri 11/20		

4. Select **Save.**

NOTE: If the pay code is keyed into eSTART, it should not be keyed into the payroll system, unless the board member is in a subset that is in PILOT mode.

Also, if the pay code is added to the timecard of someone who is not a board member, it will be rejected in the payroll system.

The board member timecards will need to be signed off if the Board Meeting pay code is present. The board members will not be required to approve their timecards, unless the agency or board requires it.

Donated Sick Leave Pay Code

Once an employee has been approved to **receive** donated leave, an agency will be able to immediately increase an employee's **eSTART** Sick Leave balance using the **Donated Sick Leave** pay code.

This pay code edit is only necessary if the GHRS Sick Leave accrual transaction **has not** been processed by GHRS and sent to eSTART. Accrual balances in eSTART are reset using GHRS totals two business days before payday. If the eSTART accrual balance reset has occurred and the GHRS Sick Leave accrual transaction is included in the updated balance, this pay code edit is not required.

NOTE: This pay code will **ONLY** update the eSTART Sick Leave balance. **It will not be sent to GHRS**. The GHRS Sick Leave accrual transaction must be entered into GHRS for the ***receiving*** employee in addition to using this pay code. Also, the de-accrual transaction for the ***donating*** employee should be entered in GHRS. Do not enter the de-accrual into eSTART.

Using the Donated Sick Leave Pay Code in the Timecard to Increase the Sick Leave Balance

Current Sick Leave balance as of 08/01

Accrual Code	Accrual Reporting Period	Accrual Available Balance
SICK LEAVE	Mon 1/01 - Mon 12/31	0:00

1. Open the **Timecard** of the employee to update.
2. If the date row contains punches, use the [+] (plus sign icon) to insert a new row.
3. Open the **Pay Code** drop-down list on the effective date of the donation and select **Donated Sick Leave**.
4. In the **Amount** column, key in the number of hours to add to the employee's Sick Leave balance.
5. Select the **Save** button.

		Date	Pay Code	Amount
+	×	Wed 8/01	DONATED SICK LEAVE	80:00

Updated Sick Leave balance as of 08/01

Accrual Code	Accrual Reporting Period	Accrual Available Balance
SICK LEAVE	Mon 1/01 - Mon 12/31	80:00

Once the process above is complete, the **Sick Leave Taken** pay codes may be added to the employee's timecard.

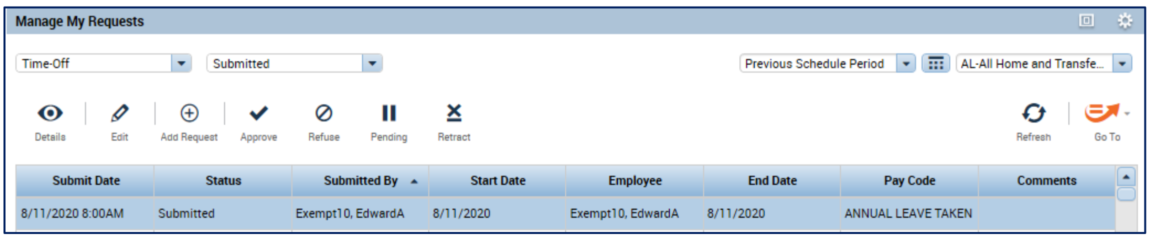
Pay Period Close and Sign-Off

NOTE: To retrieve shorter, more manageable employee listings, set up HyperFind queries by agency/division. See **Hyperfind Query Setup** job aid for creating HyperFind queries.

Also, a **Sign-Off Preparation Checklist** job aid is available on the eSTART Online Resources website and in the **Appendix** section of this guide.

Sign-Off Preparation

1. Begin by accessing the **Manage My Requests** widget to ensure that all time off requests have been appropriately acted upon. This widget is accessed from **Related Items>Manage My Requests** or from the **Go To** menu. Any requests in <u>Submitted, Pending,</u> <u>Cancel Submitted</u> or <u>Cancel Pending</u> status must be addressed. Agency Administrators may approve any unapproved requests when needed if the manager is not available. Set date range to **Previous Pay Period.**



NOTE: If unapproved time off requests are present, the manager will receive a notification the second day after the end of the pay period. On the third day, if unapproved time off requests are still present, the administrators and timekeepers receive the notification.

2. The next step is to ensure the timecards contain the correct number of hours for the pay period. Select **My Views>Employee Hours View** in the **Previous Pay Period**. This provides a view of employee regular hours, non-worked hours, total hours, overtime and comp hours. Review the information on this page for any possible issues with employee time and correct any missing or incorrect time as needed.

   Note that the total hours for Sandy Stamp are fewer than the required hours for the pay period and Edward Exempt's total hours are greater. Complete the exercise to research and correct these issues.

   Exempt employees are assigned to an Auto-PFS schedule, so their lunch time is automatically deducted. When a time off request with a midday or partial day time frame is approved, the system determines whether the employee's remaining shift contains at least 4:01 consecutive hours, either in the morning or afternoon portion of the schedule. If the employee's remaining shift does not contain at least 4:01 consecutive hours, the lunch will not be auto deducted which may require manual edits by the manager. Such is the case with Edward Exempt.

Exempt Employee Schedule Types	Auto PFS Rules for Lunch Deduction
8-hour Employee	The lunch will be deducted when the shift length is 4:01 hours.
9-hour Employee	The lunch will be deducted when the shift length is 4:31 hours.
10-hour Employee	The lunch will be deducted when the shift length is 5:01 hours.

Exercise

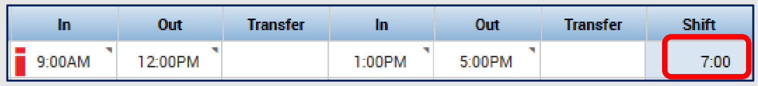
The total hours of Sandy Stamp and Edward Exempt are not correct.

Steps

1 Select **Sandy Stamp** and **Edward Exempt** in the list and select **Go To>Timecards**.

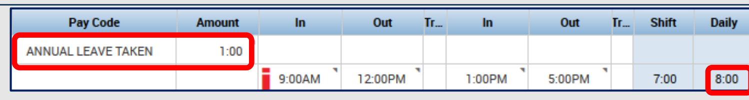
2 Sandy Stamp's timecard contains "late in" exceptions and does not have the correct total hours for the pay period.

Add one hour of Annual Leave to Sandy's timecard for each day that she was late.



3

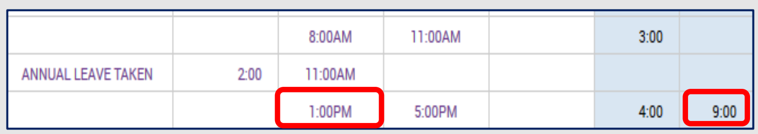
- Select the **Insert Row** button for each of the dates.
- Select **Annual Leave Taken** from the Pay Code drop-down.
- Key **1** in the **Amount** column for each date.
- Select **Calculate Totals** to confirm that Sandy's time is now correct.
- **Save** the timecard.



4 Scroll to Edward Exempt's timecard.

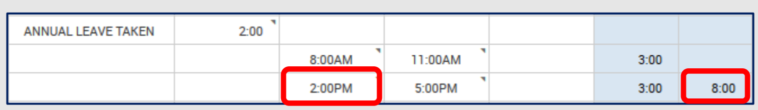
5 The timecard page displays. Note that one of the dates in Edward's timecard shows 9 total hours instead of 8. This is due to a midday partial time off request.

The lunch time was not auto deducted since neither the morning nor afternoon shift was at least 4:01 hours.



6 Change the **1pm** time in the timecard to **2pm**.

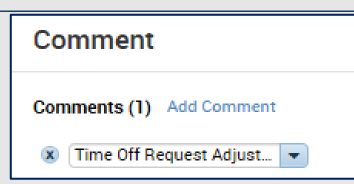
NOTE: This correction may also be made to the schedule via the Schedule Editor.



7 Select **Calculate Totals** to verify the hours are now correct.

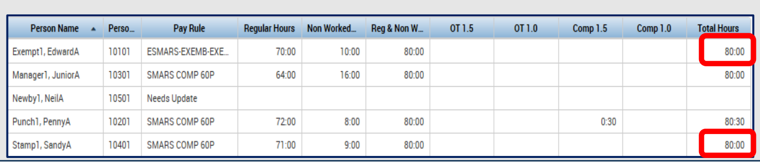
8 Right-click on the punch, select **Add Comments** and choose **Time Off Request Adjustment.**

- Click **OK**.
- **Save** the change.



9 Close the **Timecards** tab.

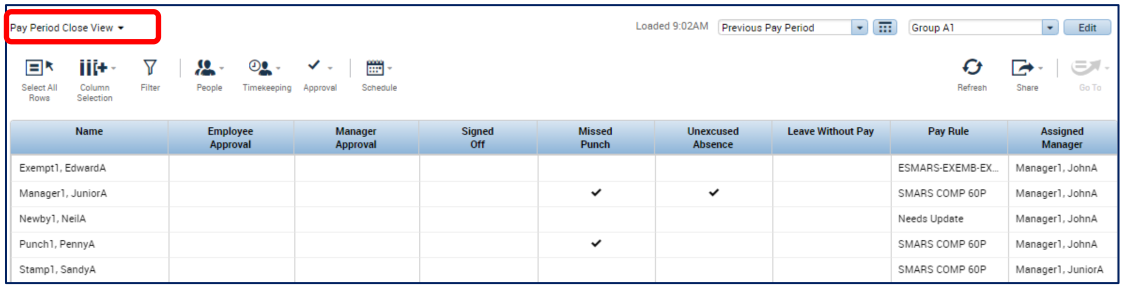
Click the **Refresh** button to update the **Employee Hours View** page. Verify that total hours are now correct.



Person Name	Perso...	Pay Rule	Regular Hours	Non Worked...	Reg & Non W...	OT 1.5	OT 1.0	Comp 1.5	Comp 1.0	Total Hours
Exempt1, EdwardA	10101	ESMARS-EXEMB-EXE...	70:00	10:00	80:00					80:00
Manager1, JuniorA	10301	SMARS COMP 60P	64:00	16:00	80:00					80:00
Newby1, NeilA	10501	Needs Update								
Punch1, PennyA	10201	SMARS COMP 60P	72:00	8:00	80:00			0:30		80:30
Stamp1, SandyA	10401	SMARS COMP 60P	71:00	9:00	80:00					80:00

3. Lastly, select **Pay Period Close View** to verify employee and manager approvals as well as any missing punches or unexcused absences remaining in the timecards.

   Select the HyperFind from the Show drop-down. **Previous Pay Period** is the default in the Time Period drop-down.



A description of the indicators in each column is below.

a. A check mark in the **Employee Approval** column indicates employee approval.

b. A **1** in the **Manager Approval** column indicates one manager has approved. The number will change if more than one manager approves the timecard. **Any missing manager approvals should be obtained before sign-off is performed**.

c. A check mark in the **Missed Punch** or **Unexcused Absence** column indicates the presence of these exceptions in the timecard.

d. An amount in the **Leave Without Pay** column indicates that Leave Without Pay is present in the timecard.

e. If **Needs Update** displays in the **Pay Rule** column for an employee, the employee information must be updated in the People Editor before sign-off can occur. This occurs once all approvals are applied in the payroll system and passed to eSTART. If the pay rule is not updated before the sign-off date in eSTART, entries must be completed in the payroll system to ensure the employee is paid correctly.

NOTE: A manager may remove his approval from the timecard to make any corrections. If the manager is not available, the Timekeeper or Agency Administrator may remove all manager approvals by selecting **Approve Timecard>Removal All Timecard Approvals**.

Visual indicators are also present within the timecard to determine the level of approval.

Approval Type	Visual Indicator
Employee approval	When a timecard is approved by an employee, the cells in the timecard turn **light tan or orange**.
Manager approval	When a timecard is approved by a manager, the cells in the timecard turn **light yellow**.
Employee and Manager approval	When a timecard is approved by both an employee and a manager, the cells in the timecard turn **light green**.
Agency Administrator Sign-Off	When a timecard is signed off, the cells in the timecard turn **light gray**.

Sign-Off

NOTE: The Timekeeper role will not have access to the Sign-Off functionality.

On the 5th business day before each payday, a sign-off reminder notification will be sent to Agency Administrators and sign-off must be completed by noon on that day. The date is located on the payroll system monthly calendar that is sent to all administrators.

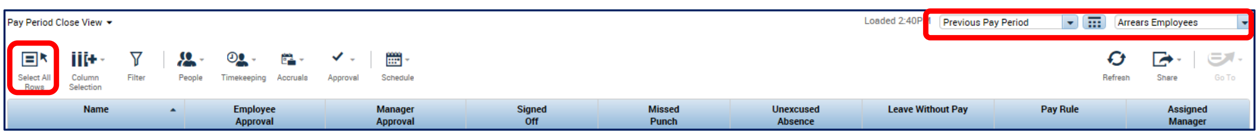
Once all exceptions have been corrected and all approvals obtained, the timecards are ready for sign-off.

VERY IMPORTANT! Sign-off for each of the items below must be done separately.

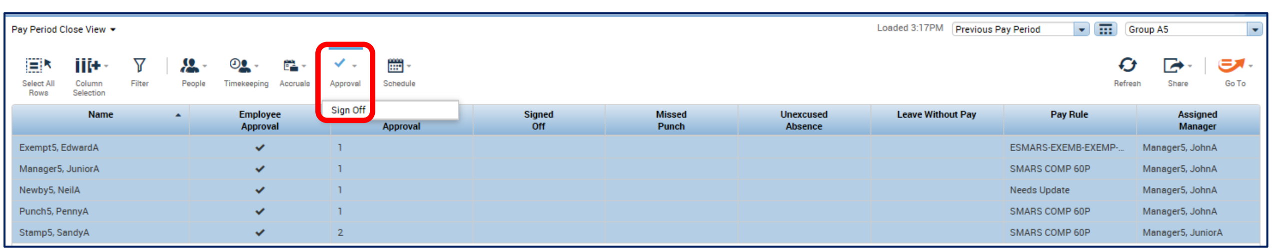
- Sign-off for **Arrears** employees should be completed in **Previous Pay Period**.
- Sign-off for **Current** employees, if applicable, should be completed in **Current Pay Period**.

Sign-off

1. From **Pay Period Close,** choose the HyperFind for the employees to be signed off from the drop-down.
2. Verify that **Previous Pay Period** is the default selection in the Time Period drop-down.
3. Choose **View>Select All Rows** to select all the employees in the list.



4. Select **Approval>Sign Off** to sign-off on all timecards.
5. The message **Are you sure you want to Sign Off?** displays. Click **Yes.**
6. Click the **Refresh** button to view the check marks in the **Signed Off** column.
7. Click the **Signed Off** column header once to sort any non-signed off timecards to the top of the list. Review and if necessary, make corrections and apply sign-off ONLY to these timecards.



IMPORTANT NOTE!

DO NOT re-apply sign-off to timecards that are already signed off. This will apply the sign-off to the <u>Current Pay Period</u>.

If for some reason sign-off needs to be removed, see the **Automated Sign-Off Removal** instructions in the **Appendix** section of this guide or contact your eSTART Administrator.

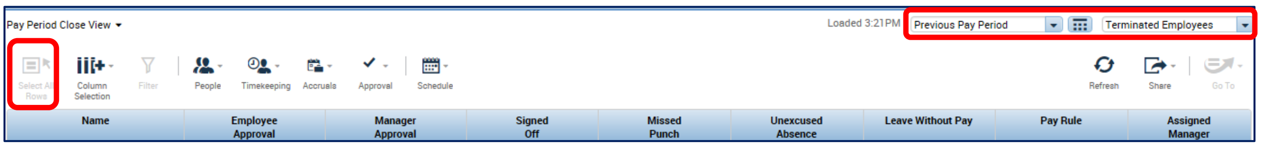
VERY IMPORTANT: All employee timecards MUST be signed off by the agency. No employee data is sent to the payroll system for timecards that are not signed off.

Terminated Employee Sign-Off

As instructed earlier, the timecard of a terminated employee should be signed off as soon as the employee completes his last day at the agency and the manager approval is applied. However, this should be verified to ensure these timecards have been signed off.

NOTE: The **Terminated Employees** HyperFind must be used to retrieve employees in terminated status.

1. From **Pay Period Close,** choose the **Terminated Employees** HyperFind in the Show drop-down.
2. Select **Previous Pay Period** from the Time Period drop-down.
3. Use **Select All Rows** to select all the employees in the list.



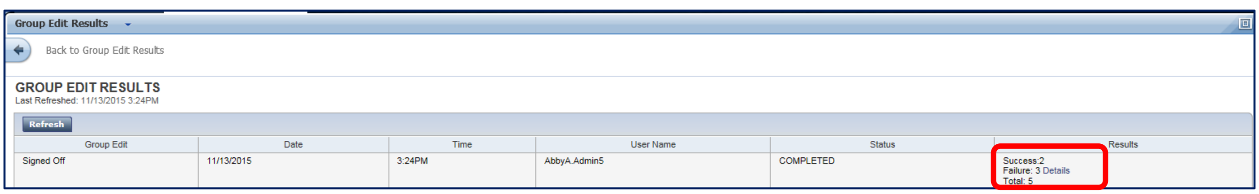
4. Follow the process in the Sign-Off section to sign-off on all timecards.

VERY IMPORTANT! DO NOT update or sign-off on an employee's timecard for any pay period following their last day at the agency. This will be the responsibility of the current agency.

Group Edit Results

This page is used to display the success or failure of the sign-offs.

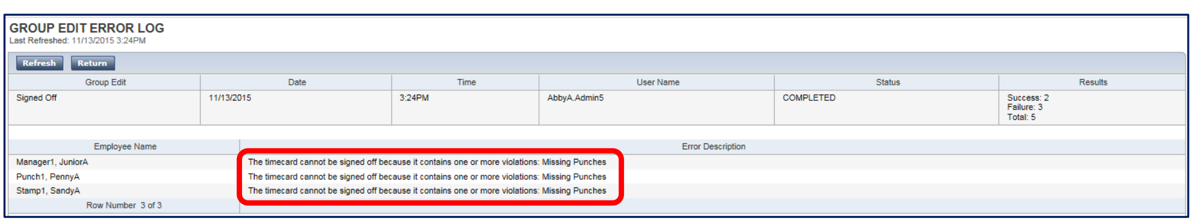
Go to the **Related Items** pane and select **Group Edit Results**.



In the **Results** column, the number of successful sign-offs display here, as well as the number of failed ones.

1. If failures are present, the word **Details** is a link. Select the link to open the error log. A new section of the page will display the failure reason in the **Error Description** column. The Employee Name displays as well.

NOTE: If a timecard has already been signed off due to resignation or transfer, this would cause a sign-off failure, but would not require correction.



2. Once the errors have been corrected, close the **Group Edit Results** tab and return to the **Pay Period Close View.** Once the remaining employee timecards have been corrected, sign-off on those. This sign-off can be verified from **Group Edit Results** as well.

NOTE: An individual timecard sign-off error will not display from **Group Edit Results**. It is used only for *group* edits, as above.

Sign-off on an individual timecard may be verified from the employee timecard since the signed-off individual timecard will display in a light gray color, as below.

Date	Pay Code	Amount	In	Out	Tran...	In	Out	Transf...	Shift	Daily	Period
Mon 7/...	4th Day of July	8:00								8:00	8:00
Tue 7/05			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	16:00
Wed 7/...			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	24:00
Thu 7/07			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	32:00
Fri 7/08			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	40:00

NOTE: eSTART payroll processing begins running at exactly noon on the cutoff date.

- **Any timecard sign-offs applied at or after the 12:00pm deadline on that date will not be processed.**
- If the deadline is missed, **no hours will be sent to the payroll system for Hourly employees nor Comp, Overtime or leave hours for any employee.**
- A notification will be sent to all agency administrators and timekeepers at the agency advising that there are transactions that were not sent to GHRS. If you receive this notice, your agency has missing transactions that **must be manually keyed in GHRS.**
- There is an **eSTART Missing GHRS Txns** report available from **Reports Manager** to assist with identifying these transactions**.**

eSTART Missing GHRS Txns

For: 08/16/2018 - 08/31/2018

Agy	Org	Work Loc	Emp #	Emp Name	Pay Rule	Status	Current or Arrears	PP Start	PP End	Last SO DT	Reason
				Pay Code		Txn Date		Amount			

Rules, Cascades and Interfaces

Holiday Credit Rules

For most employees, the holiday will be credited if the employee is in pay status any portion of the work day before and the day after the holiday. One exception to this is a part-time or hourly employee.

Part-time Employees

Part-time employees receive holiday credit based on their schedule. If the holiday falls on a scheduled work day and the employee is in pay status the day before and after, the holiday will be granted based on the scheduled number of hours for that day.

If the employee is not scheduled to work on the holiday, no credit will be granted.

Tue 7/03			7:45AM	2:45PM					7:00	7:00	7:00	7:45AM-2:45PM
Wed 7/04	4th Day of July	5:00								5:00	12:00	
												7:45AM-12:45PM
Thu 7/05			7:45AM	11:45AM					4:00	4:00	16:00	7:45AM-11:45AM

NOTE: The **Totals** tab of the timecard displays the number of **Holiday Taken** hours and the **Holiday Earned** hours.

Hourly Employees

Hourly employees **will not** automatically receive holiday credit. The timecard will have a placeholder displaying the holiday, but no credit will be given to the employee. Therefore, the holiday will need to be manually added to the timecard for the **eligible** hourly employee.

Mon 7/04	4th Day of July	0:00		

1. On the date of the holiday, select the **Insert Row** button.
2. Select **Holiday Earned** from the **Pay Code** drop-down list.
3. In the **Amount** column, key the number of hours for the holiday.
4. Select the **Save** button.
5. If the employee observed the holiday, insert a second row to the timecard and select **Holiday Taken** in the **Pay Code** column.
6. Enter the number of Holiday hours taken in the **Amount** column.
   Reminder: punches cannot be entered on the same line as the holiday.
7. Select the **Save** button.

NOTE: The **Totals** tab of the timecard displays the number of **Holiday Taken** hours and the **Holiday Earned** hours.

Timestamp/Punch Employee

Timestamp/Punch full-time employees automatically receive holiday credit if the employee is in pay status the scheduled day before and scheduled day after a holiday.

The timecard below is an example that reflects eight hours of holiday credit. The **Holiday Taken** and **Holiday Earned** pay codes display on the **Totals** tab at the bottom of the timecard.

Date	Pay Code	Amount	In	Out	Transfer	In	Out	Transfer	Shift	Daily	Period	Schedule
Mon 10/09	Columbus Day	8:00								8:00	8:00	
												8:00AM-5:00PM
Tue 10/10			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	16:00	8:00AM-5:00PM
Wed 10/11			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	24:00	8:00AM-5:00PM
Thu 10/12			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	32:00	8:00AM-5:00PM
Fri 10/13			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	40:00	8:00AM-5:00PM

Totals Accruals Historical Corrections Audits

All All

Account	Pay Code	Amount
001/0000/100010/10301/10198/-/-	HOLIDAY EARNED	8:00
001/0000/100010/10301/10198/-/-	HOLIDAY TAKEN	8:00
001/0000/100010/10301/10198/-/-	REGULAR	32:00

If the employee works on the holiday, the hours worked display on the timecard. The holiday credit hours are reflected by the **Holiday Earned** pay code, and the unworked hours automatically go to the **Holiday Taken** pay code. Any **Holiday Earned** hours that are not utilized on the holiday will be banked for use at a later time.

Date	Pay Code	Amount	In	Out	Transfer	In	Out	Transfer	Shift	Daily	Period	Schedule
Mon 10/09	Columbus Day	4:00										
			8:00AM	12:00PM					4:00	8:00	8:00	8:00AM-5:00PM
Tue 10/10			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	16:00	8:00AM-5:00PM
Wed 10/11			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	24:00	8:00AM-5:00PM
Thu 10/12			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	32:00	8:00AM-5:00PM
Fri 10/13			8:00AM	12:00PM		1:00PM	5:00PM		8:00	8:00	40:00	8:00AM-5:00PM

Totals Accruals Historical Corrections Audits

All All

Account	Pay Code	Amount
001/0000/100010/10301/10198/-/-	HOLIDAY EARNED	8:00
001/0000/100010/10301/10198/-/-	HOLIDAY TAKEN	4:00
001/0000/100010/10301/10198/-/-	REGULAR	36:00

NOTE: If the employee is not in pay status the day scheduled day before or scheduled day after the holiday, the holiday will not be earned. In this case, the manager or Agency Admin must add the pay code for **Leave Without Pay** to the timecard on the date of the holiday to prevent the employee being paid for the holiday.

Exempt Employees

Full-time, exempt employees will automatically receive credit for a holiday but must be in pay status the work day before and after the holiday. The manager does not have to make any changes to the timecard for the employee to receive credit. However, the holiday credit may need to be replaced with Leave Without Pay, if the employee is not eligible for the holiday, based on the agency's policy for pay status.

For exempt employees, the **Holiday Earned** and **Holiday Taken – Exempt** pay codes display with the number of holiday hours granted to the employee based on their work schedule.

Date	Pay Code	Amount	In	Out	Transfer	In	Out	Transfer	Shift	Daily	Period	Schedule
Mon 10/09	Columbus Day	8:00								8:00	8:00	
												8:00AM-5:00PM
Tue 10/10			8:00AM	5:00PM					8:00	8:00	16:00	8:00AM-5:00PM
Wed 10/11			8:00AM	5:00PM					8:00	8:00	24:00	8:00AM-5:00PM
Thu 10/12			8:00AM	5:00PM					8:00	8:00	32:00	8:00AM-5:00PM
Fri 10/13			8:00AM	5:00PM					8:00	8:00	40:00	8:00AM-5:00PM

Totals | Accruals | Historical Corrections | Audits

All | All

Account	Pay Code	Amount
001/0000/100010/10001/10518/-/-	HOLIDAY EARNED	8:00
001/0000/100010/10001/10518/-/-	HOLIDAY TAKEN - EXEMPT	8:00
001/0000/100010/10001/10518/-/-	REGULAR	32:00

If the exempt employee works on the holiday and should bank the holiday hours to be used later, the manager will need to make adjustments to the timecard to reflect the correct hours worked.

NOTE: The employee also has the option of punching their time when working on a holiday.

- Using the "insert row" icon located to the left of the date of the holiday, insert an additional row into the timecard.
- In the **In** and **Out** columns, enter the time that reflects the schedule that the employee worked. Reminder: punches cannot be entered on the same row as the holiday.
- Select the **Save** button. Notice the **Holiday Earned** pay code below.

Date	Pay Code	Amount	In	Out	Transfer	In	Out	Transfer	Shift	Daily	Period	Schedule
Mon 10/09	Columbus Day	0:00										
			8:00AM	5:00PM					8:00	8:00	8:00	8:00AM-5:00PM
Tue 10/10			8:00AM	5:00PM					8:00	8:00	16:00	8:00AM-5:00PM
Wed 10/11			8:00AM	5:00PM					8:00	8:00	24:00	8:00AM-5:00PM
Thu 10/12			8:00AM	5:00PM					8:00	8:00	32:00	8:00AM-5:00PM
Fri 10/13			8:00AM	5:00PM					8:00	8:00	40:00	8:00AM-5:00PM

Totals | Accruals | Historical Corrections | Audits

All | All

Account	Pay Code	Amount
001/0000/100010/10001/10518/-/-	HOLIDAY EARNED	8:00
001/0000/100010/10001/10518/-/-	REGULAR	40:00

Notice the holiday credit amount in the timecard is now zero and only eight hours of **Holiday Earned** displays in the lower portion of the timecard**.** The **Holiday Taken-Exempt** pay code no longer displays.

Non-Traditional Employees

Non-Traditional employees are those whose work schedules fall outside of the normal Monday through Friday work week. For example, those who work overnight shifts or those who work four 10-hour days a week are considered non-traditional employees.

Non-Traditional employees will automatically bank their holiday hours based on their schedule type of 8, 9, 10, 12 or 24. eSTART will only bank the **Holiday Earned** hours for employees who have worked the **scheduled** shift prior to the holiday and the **scheduled** shift after the holiday. This type of employee does not have to work on the holiday for the hours to be banked.

A Holiday is a Regular Work Day for a Non-Traditional Employee

For a non-traditional employee, a holiday is considered a regular work day. Therefore, the employee must account for the total number of hours on the scheduled work day.

In the example below, the 10-hour employee received ten hours of **Holiday Earned** and worked seven hours on the holiday. Since the employee worked seven hours but was scheduled to work ten hours, three hours of leave must be used for the remainder of the scheduled day.

Date	Pay Code	Amount	In	Out	Transfer	In	Out	Transfer	Shift	Daily	Period	Schedule
Sun 10/08												
Mon 10/09	Columbus Day	10:00										
	SICK LEAVE TAKEN	3:00	7:00AM									
			10:00AM	12:00PM		12:30PM	5:30PM		7:00	10:00	10:00	10:00AM-5:30PM
Tue 10/10			7:00AM	12:00PM		12:30PM	5:30PM		10:00	10:00	20:00	7:00AM-5:30PM
Wed 10/11			7:00AM	12:00PM		12:30PM	5:30PM		10:00	10:00	30:00	7:00AM-5:30PM
Thu 10/12			7:00AM	12:00PM		12:30PM	5:30PM		10:00	10:00	40:00	7:00AM-5:30PM
Fri 10/13			7:00AM	12:00PM		12:30PM	5:30PM		10:00	10:00	50:00	7:00AM-5:30PM
Sat 10/14											50:00	

Totals | Accruals | Historical Corrections | Audits

All | All

Account	Pay Code	Amount
004/0330/FSHQ00/134865/90570/-/-	HOLIDAY EARNED	10:00
004/0330/FSHQ00/134865/90570/-/-	REGULAR	37:00
004/0330/FSHQ00/134865/90570/-/-	SICK LEAVE TAKEN	3:00

EMPLOYEE NOT IN PAY STATUS: If the employee is not in pay status the scheduled work day before and after the holiday, Holiday Earned will not be granted. Add **Leave Without Pay** to the timecard on the date of the holiday when the employee is not in pay status.

EMPLOYEE NOT IN PAY STATUS WITH NO ASSIGNED SCHEDULE: If no schedule is assigned to the employee, **Holiday Earned** will always be granted.

If the employee was not in pay status, add a schedule to the day before the holiday to remove the Holiday Earned accrual. Add **Leave Without Pay** to the timecard on the date of the holiday when the employee is not in pay status.

Annual Leave Cascade

A cascade defines how leave time is processed in the system**. <u>If the employee does not directly select Comp Time, Excess Annual Leave, etc. when submitting their request, but selects Annual Leave instead</u>**, their leave will be used, based on the time of the year, in the order as described in the chart below:

Annual Leave Cascade	
January 1 – July 31	**August 1 – December 31**
Comp Time	Personal Day
Excess Annual Leave	Excess Annual Leave
Annual Leave	Comp Time
	Annual Leave

NOTE
The following are not impacted by the cascade:

- The employee should follow the agency's policy and procedures regarding the usage of personal leave days before August 1st.
- Holiday banked time should be scheduled by the supervisor in the quarter in which it was earned.

If the cascade makes a change to the type of leave originally submitted, the timecard will display the information as indicated below.

In this example, the original request was for two hours of annual leave. Since the employee had one hour of Comp Time and also had Excess Annual Leave time, the cascade reversed the original request for annual leave, used the Comp Time first, then the Excess Annual Leave.

ANNUAL LEAVE CASCADE	-2:00					
COMP TIME CASCADE	1:00					
EXCESS ANNUAL CASCADE	1:00					
		7:29AM	1:31PM		6:00	
ANNUAL LEAVE TAKEN	2:00	1:30PM				8:00

A comment is added to each entry in the timecard to indicate the change was made by the cascade. These comments may be viewed from **Go To>Audits.** Select **Comments** from the **Category** drop-down to view the comments.

Date	Time	Type	User	Comment
Wed 3/23	6:29AM	Punch		Early - Approved
Fri 3/25		Pay Code Edit	Import	Cascade Change
		Pay Code Edit	Import	Cascade Change
		Pay Code Edit	Import	Cascade Change

Interface

Compensatory Time Overage Payout

Comp Time hours over an employee’s regular work hours are sent to a Comp Time Earned bucket. For non-law enforcement employees, the bucket limit is 240 hours. For law enforcement employees, the bucket limit is 480. Any hours earned that exceed the 240 or 480 limits are sent to a Comp Overage bucket.

Once an employee’s balance reaches 220 hours for non-law enforcement or 440 hours for law enforcement, a notification is sent to the employee, the employee’s manager, and all Agency Administrators indicating that the employee’s Comp balance is nearing its limit and needs to be addressed. A liquidation request should then be sent to State Personnel.

eSTART has an automated interface to the payroll system that runs on Friday each week. Any Comp Overage hours for the week will be added to the timecard on the current pay period and sent to the payroll system in the next extract file.

Extended Leave for Administrators

Importance

It is important that the State of Alabama's leave policy rules are consistently and accurately administered. To make this happen, employees paid and unpaid leave should be managed in an efficient and timely manner. The Leave application supports the ability to perform leave administration tasks.

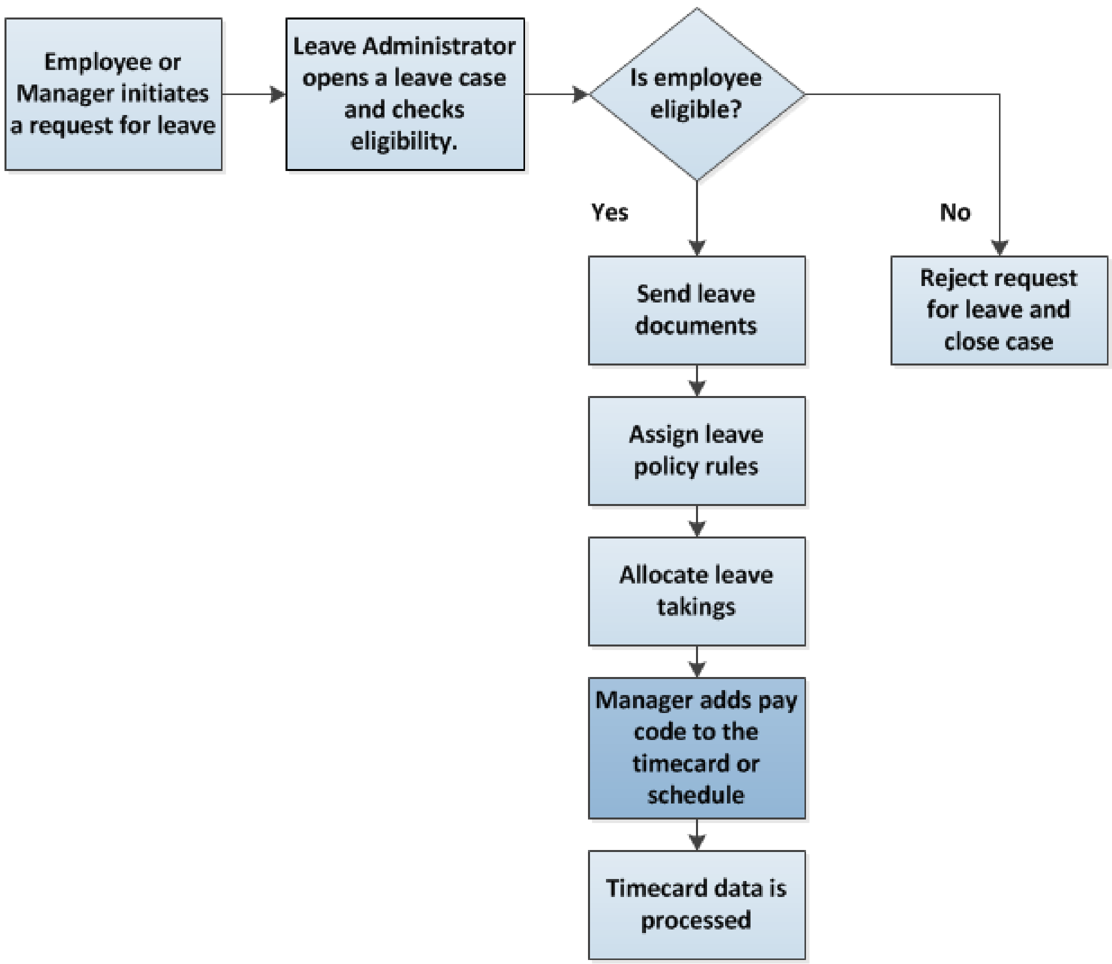
eSTART Leave:

- Automates the process of administering leave policies.
- Assists the State of Alabama in achieving compliance with required federal and state mandates.

The Leave Process

The Leave process automates the administering and tracking of paid and unpaid leave policies. Administrators can easily track both continuous and intermittent leave. In addition to centralizing administration of leave policies throughout the State of Alabama, employees benefit from the consistent application of leave policies to individual leave cases.

The following illustration shows the high-level process for administering leave cases.



Roles and Responsibilities

The employee and manager each have responsibilities that are important in the leave process. Each person's role determines his or her responsibilities, and the tasks that he or she performs in the application.

Common Employee Tasks

On an as-needed basis, employees perform the following tasks:

- Submit new leave case requests.
- Request time off for an open and approved leave case.
- Provide required leave documentation.
- Submit requests for additional leave, as needed.

Common Manager Tasks

On an as-needed basis, department managers perform the following tasks:

- Monitor leave events through leave views.
- Enter hours for employees' leave cases.
- Submit a leave case for an employee.
- Run leave reports.

Common Leave Administrator Tasks

On an as-needed basis, typical Leave Administrator tasks include:

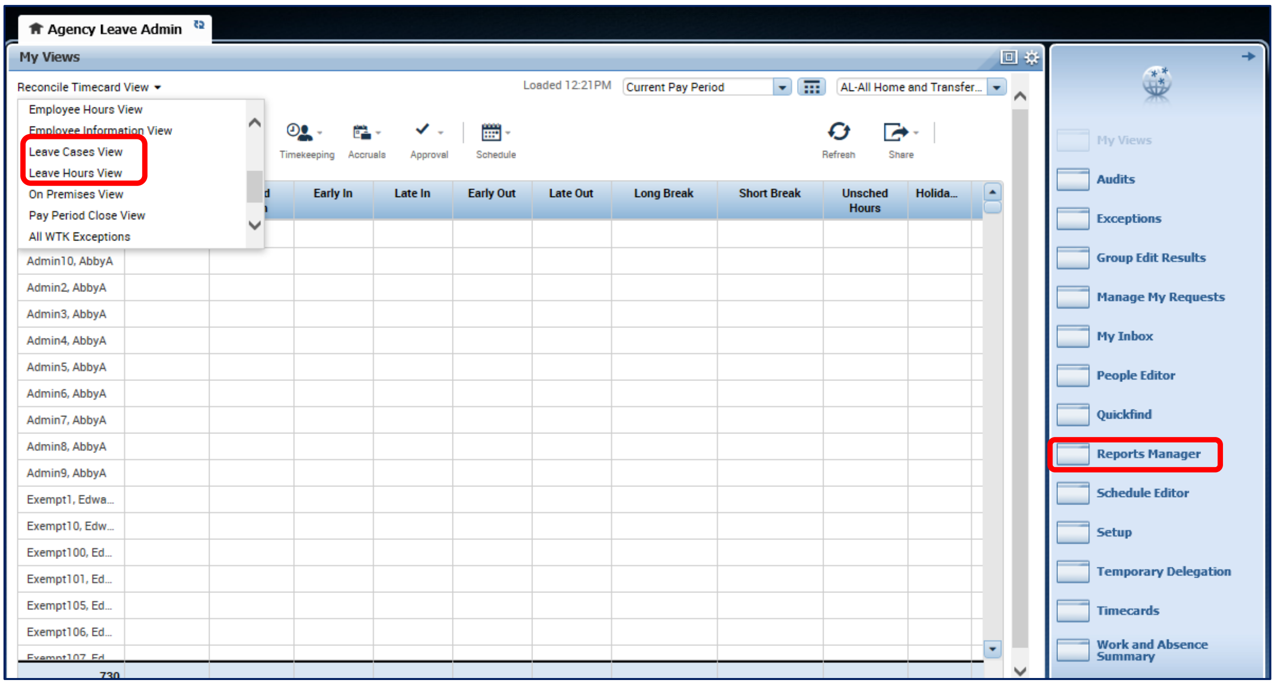
- Determine eligibility and open leave cases.
- Administer open leave cases, including documentation.
- Enter hours for employees' continuous leave cases.
- Run leave reports.

Managing Leave

Exploring Leave Tools in eSTART

There are three key tools available to assist you in performing common leave tasks, such as opening a new leave case, entering your employees' leave takings, and monitoring leave cases.

Key Leave Tools



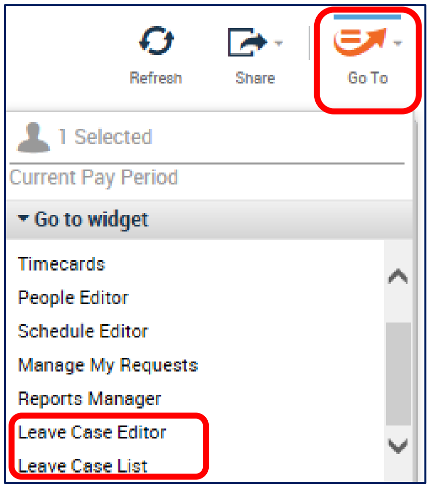
NOTE: The view above is the default view for an Agency/Leave Administrator.

Tools	Description
My Views	Access the **My Views** drop-down list in eSTART to view Leave Views such as **Leave Hours View** and **Leave Cases View**. You can also use this page to access employee timecards for purposes of entering leave time for employees.
Reports Manager	Access the **Reports Manager** page in eSTART to run and view leave reports, such as the **Leave Hours Detail** and **Leave Hours Summary** reports.

Using the Tools in Leave Views

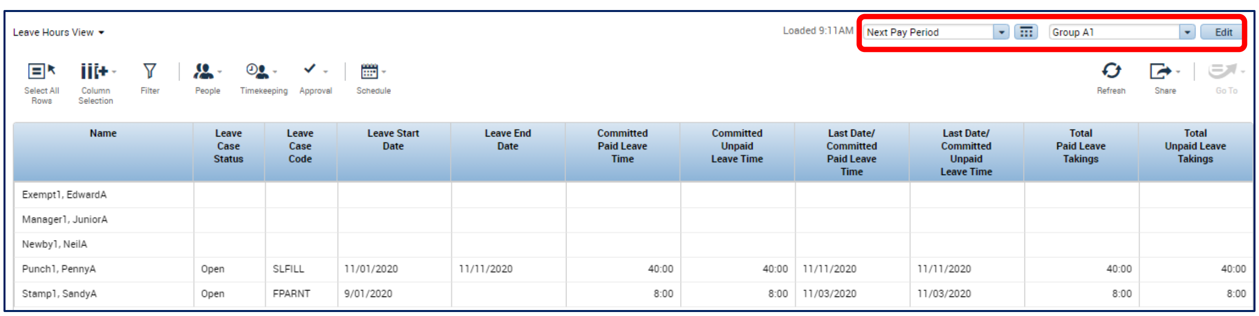
The **Go To** menu is located at the top right of the view, which allows you to quickly access editors and tools that display information specific to one or more employees. For example, select an employee and click the **Go To>Timecards** link to access the timecard for purposes of adding leave time; or select multiple employees and click **Go To>Reports Manager** to generate a report for only those selected employees. The **Leave Case Editor** is available from this menu to open a new case, or the **Leave Case List** is available when selecting and editing an existing case.

NOTE: This tool is common to both the **Leave Hours View** and the **Leave Cases View**.



The Show drop-down allows you to select and display a specific group of employees. The default setting for the Show field when you log on is **All Home and Transferred In**, which displays all employees that report to you. You can use the Show field to further refine your selection.

The Time Period field allows you define the desired timeframe. The default setting for the Time Period field is **Current Pay Period**. You can select a predefined date period option, such as Previous Pay Period or, you can define a specific date or range of dates.



Tip

- Use the **Ctrl** key to select more than one employee not listed next to each other.
- Use the **Shift** key to select all employees listed between two employees, including the two employees.
- Click and drag the mouse to select employees.
- Choose the **Select All Rows** icon to select all employees.

Accessing Leave Views

eSTART includes the following leave views:

- Leave Cases View
- Leave Hours View

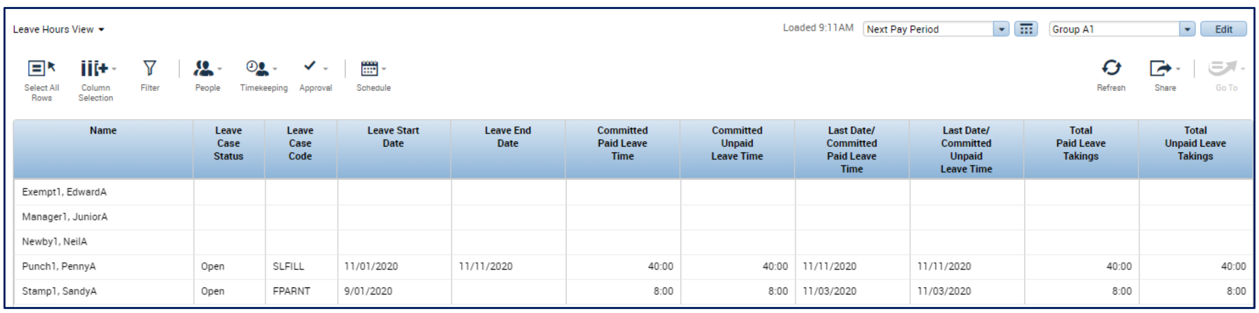
Either of these views may be used as a starting point for viewing and monitoring employee leave cases or to link to the **Leave Case Editor** for opening a new case**.**

Exploring the Leave Hours View

The **Leave Hours View** is especially useful for viewing total leave hours. It also provides other information about each leave case in eSTART, including:

- Leave Case Status
- Last date of committed paid and unpaid leave time
- Leave end date (if one is provided)

Key Information in the Leave Hours View



Name	Leave Case Status	Leave Case Code	Leave Start Date	Leave End Date	Committed Paid Leave Time	Committed Unpaid Leave Time	Last Date/ Committed Paid Leave Time	Last Date/ Committed Unpaid Leave Time	Total Paid Leave Takings	Total Unpaid Leave Takings
Exempt1, EdwardA										
Manager1, JuniorA										
Newby1, NeilA										
Punch1, PennyA	Open	SLFILL	11/01/2020	11/11/2020	40:00	40:00	11/11/2020	11/11/2020	40:00	40:00
Stamp1, SandyA	Open	FPARNT	9/01/2020		8:00	8:00	11/03/2020	11/03/2020	8:00	8:00

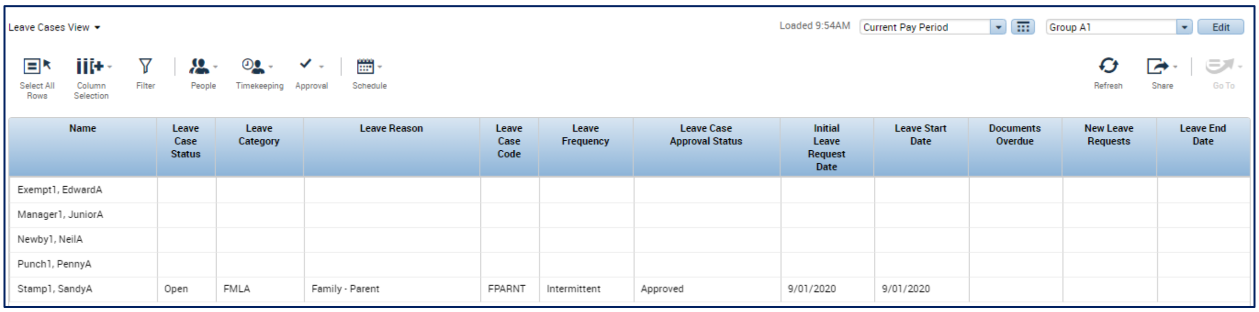
Column	Description
Leave Case Status	Indicates the status of the leave case for the specified time period. Statuses may include: Open, Closed, Submitted, or Retracted.
Leave Case Code	Type of leave, such as Self or Family.
Leave Start Date	This is the first day that the employee goes on leave of absence.
Leave End Date	This is the employee’s expected return date.
Committed Paid/ Unpaid Leave Time	The Committed Paid Leave Time and Committed Unpaid Leave Time columns show the amount of paid and unpaid time that has been committed to the schedule or timecard in the selected time period.
Last Date/Committed Paid/Unpaid Leave Time	The Last Date/Committed Paid Leave Time and Last Date/Committed Unpaid Leave Time columns show the date of the last committed paid and unpaid amounts.
Total Paid/Unpaid Leave Time	The Total Paid Leave Takings and Total Unpaid Leave Takings columns show the total amount of paid and unpaid leave that an employee has taken.

Exploring the Leave Cases View

The Leave Cases View is especially useful for viewing leave reasons and frequencies. It also provides other information about each leave case in eSTART including:

- Leave case status
- Leave category
- Initial leave request date

Key Information in the Leave Cases View



Name	Leave Case Status	Leave Category	Leave Reason	Leave Case Code	Leave Frequency	Leave Case Approval Status	Initial Leave Request Date	Leave Start Date	Documents Overdue	New Leave Requests	Leave End Date
Exempt1, EdwardA											
Manager1, JuniorA											
Newby1, NeilA											
Punch1, PennyA											
Stamp1, SandyA	Open	FMLA	Family - Parent	FPARNT	Intermittent	Approved	9/01/2020	9/01/2020			

Column	Description
Leave Case Status	Indicates the status of the leave case for the specified time period. Statuses may include: Open, Closed, Submitted, or Retracted.
Leave Category	Type of leave, such as FMLA, Military or Educational.
Leave Reason	Indicates a more specific leave such as serious health condition or birth.
Leave Case Code	Type of leave, such as Self or Family.
Leave Frequency	Indicates whether the employee is on continuous or intermittent leave.
Leave Case Approval Status	Indicates whether a leave request is approved, pending or denied.
Initial Leave Request Date	Date the leave request was made.
Leave Start Date	Date leave starts for an employee.
Documents Overdue	A check in this column indicates that a document is overdue.
New Leave Requests	A check in this column indicates additional time requested on an existing leave case.
Leave End Date	The expected date on which an employee returns to work.

New or Submitted Leave Cases

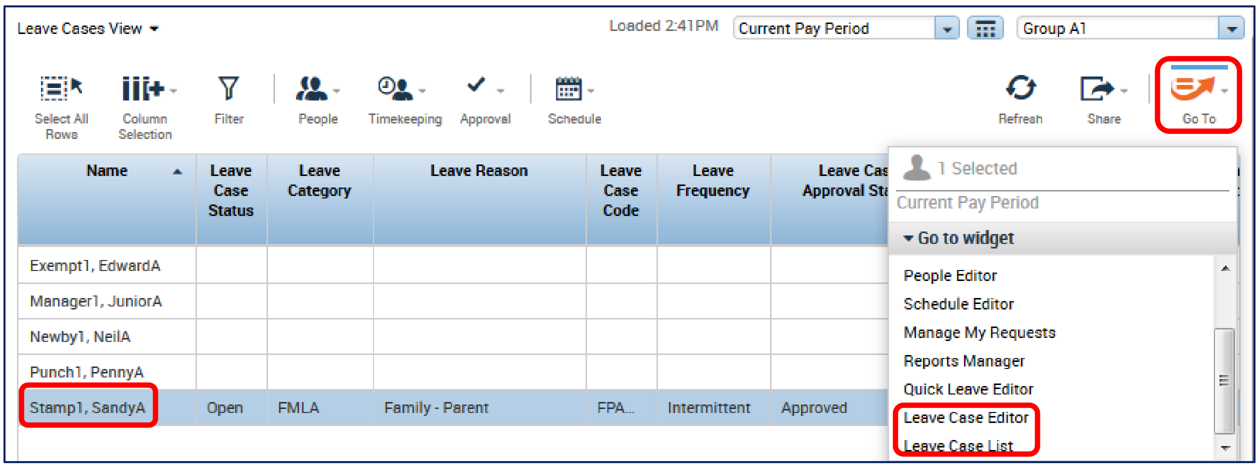
An employee may submit a request for a case, or the Leave Administrator may enter the information for the case.

Exercise

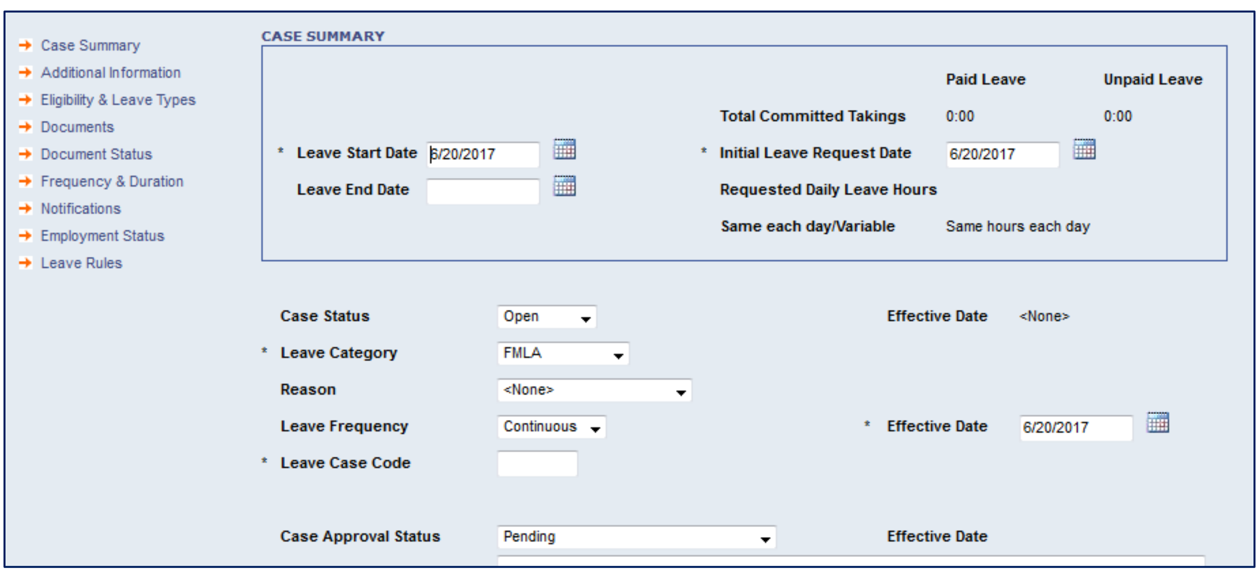
Sandy Stamp has upcoming surgery and will be out for three weeks. You will open a continuous case for her.

From the **Leave Cases View,** highlight the case and select **Go To>Leave Case Editor**.

NOTE: The **Leave Case List** selection may also be used. Select the **New** button after the list displays.

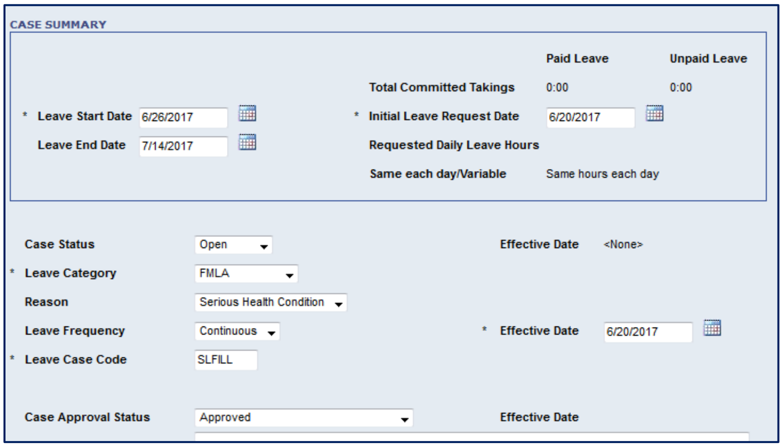


The **Leave Case Editor** will display, defaulted to the **General** tab>**Case Summary** page. If the employee submitted the case, the status displays as **Submitted** and no other options are available for edit. Otherwise, the options are editable.



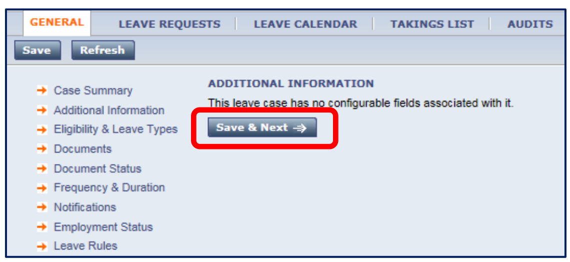
NOTE: The **Leave Start Date** is the start date of the employee's leave. The **Initial Leave Request Date** is the date the employee gives notification of the leave.

1. Enter any fields denoted with an asterisk. The other fields are optional.



2. Once all fields are updated, select **Save & Next**.

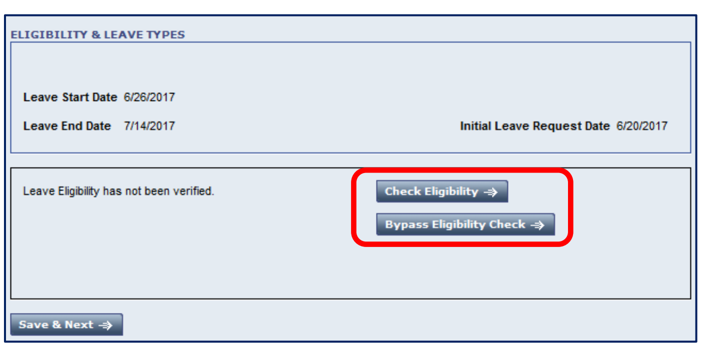
3. The **Additional Information** screen below will not be used. Select **Save & Next** to continue.



4. The **Eligibility & Leave Types** screen displays. This screen gives the Leave Administrator the ability to verify the employee's eligibility and their available Leave balances.

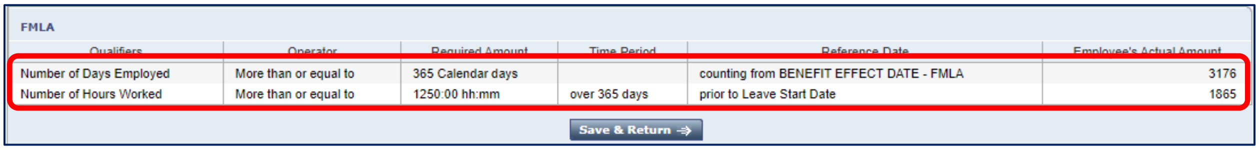
   NOTE:

   - During the first year that an Agency is on eSTART select **Bypass Eligibility Check** since the previous worked hours will not be available in eSTART. If **Check Eligibility** is used during this time, the eligibility check will fail.
   - Once the Agency has been using eSTART for 365 days, the **Check Eligibility** feature may be utilized.



Check Eligibility Screen

The **Check Eligibility** function is available once the agency has been using eSTART for one year.



FMLA

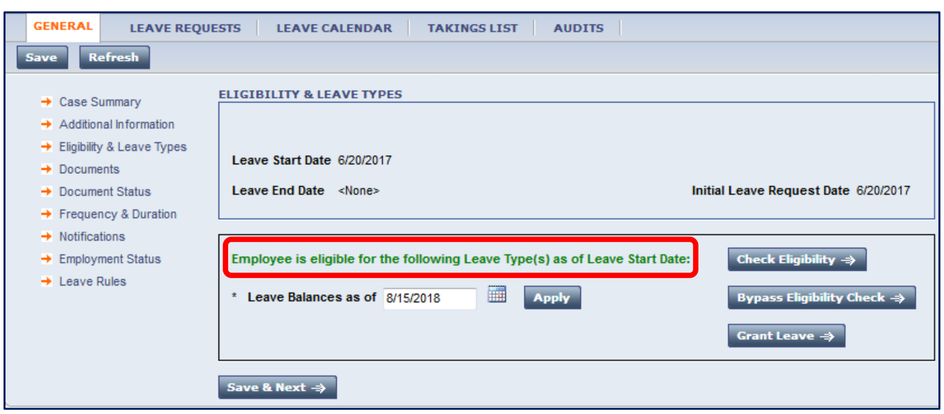
Qualifiers	Operator	Required Amount	Time Period	Reference Date	Employee's Actual Amount
Number of Days Employed	More than or equal to	365 Calendar days		counting from BENEFIT EFFECT DATE - FMLA	3176
Number of Hours Worked	More than or equal to	1250:00 hh:mm	over 365 days	prior to Leave Start Date	1865

After selecting the **Check Eligibility** button, review the results. Then select **Save & Return.**

If the employee is eligible, the message below will display with a listing of Paid Leave Types for which the employee is eligible.

Use in this Leave Case	Paid Leave Type	Committed Hours	Available Balance
☑	LV - Annual	0:00	415:45
☑	LV - Comp	0:00	0:00
☑	LV - Excess Annual	0:00	0:00
☑	LV - Excess Sick	0:00	0:00
☑	LV - Leave Without Pay	0:00	9999:00
☑	LV - Long Leave Without Pay	0:00	9999:00
☑	LV - Personal	0:00	0:00
☑	LV - Sick	0:00	817:20

If the employee is **NOT** eligible, the same message will display, but no Paid Leave Types display as in the screen print below. If no leave types display on the screen, the employee is **<u>NOT ELIGIBLE</u>**.



Bypass Eligibility Check Screen

Once the **Bypass Eligibility Check** option is selected, the screen below populates with the Paid Leave types that the employee has available.

This screen allows the user to select the types of leave that the employee chooses to use for their leave case. The check boxes may be unchecked if the specific type of leave will not be used.

NOTE: FMLA cases use leave in a certain order, which is determined by a Leave Cascade, based on the case type. Military Leave does not use a cascade. See the **Extended Leave Cascade** job aid or the **Appendix** section of this guide for this information.


ELIGIBILITY & LEAVE TYPES

Leave Start Date 10/05/2020

Leave End Date 10/23/2020

Initial Leave Request Date 9/28/2020

Eligibility Requirements have been bypassed.

Check Eligibility

* Leave Balances as of 9/30/2020 Apply

Bypass Eligibility Check

Grant Leave

Use in this Leave Case	Paid Leave Type	Committed Hours	Available Balance
☑	LV - Annual	0:00	49:10
☑	LV - Comp	0:00	0:00
☑	LV - Excess Annual	0:00	81:15
☑	LV - Excess Sick	0:00	0:00
☑	LV - Leave Without Pay	0:00	9999:00
☑	LV - Long Leave Without Pay	0:00	9999:00
☑	LV - Personal	0:00	0:00
☑	LV - Sick	0:00	70:35

5. Select **Save & Next** to go to the **Documents** screen.

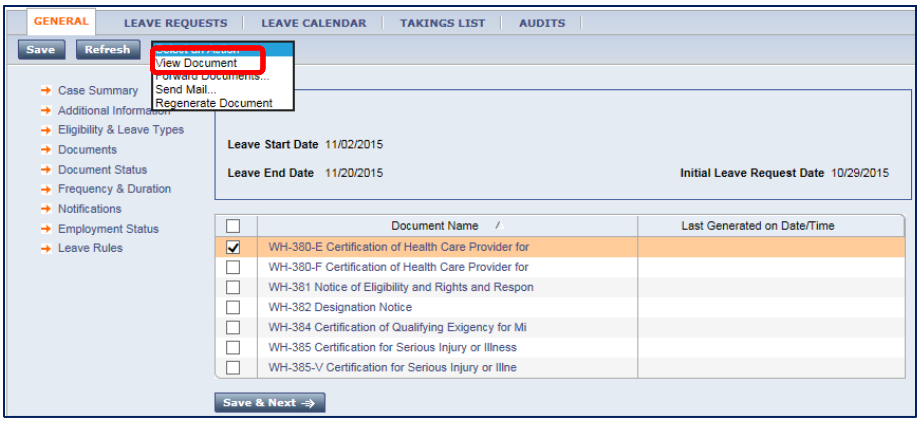
NOTE: See next section for specific information about **Long Leave Without Pay, Non-FMLA Long Leave Without Pay** and **Long Military Leave Without Pay** types.

Documents Screen

The **Documents** screen is used to create and view documents that are associated with the Leave case for the employee.

NOTE: Make sure pop-up blockers are turned off in the browser before attempting to open the forms. Also, the selections/questions below may appear in a different format in different browsers.

6. Select a document to be generated for the employee.
7. From the **Select an Action** drop-down, select **View Document**.

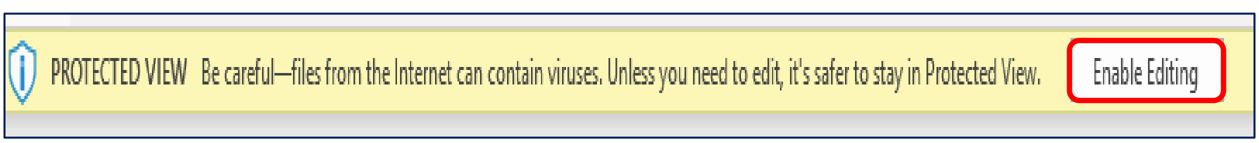


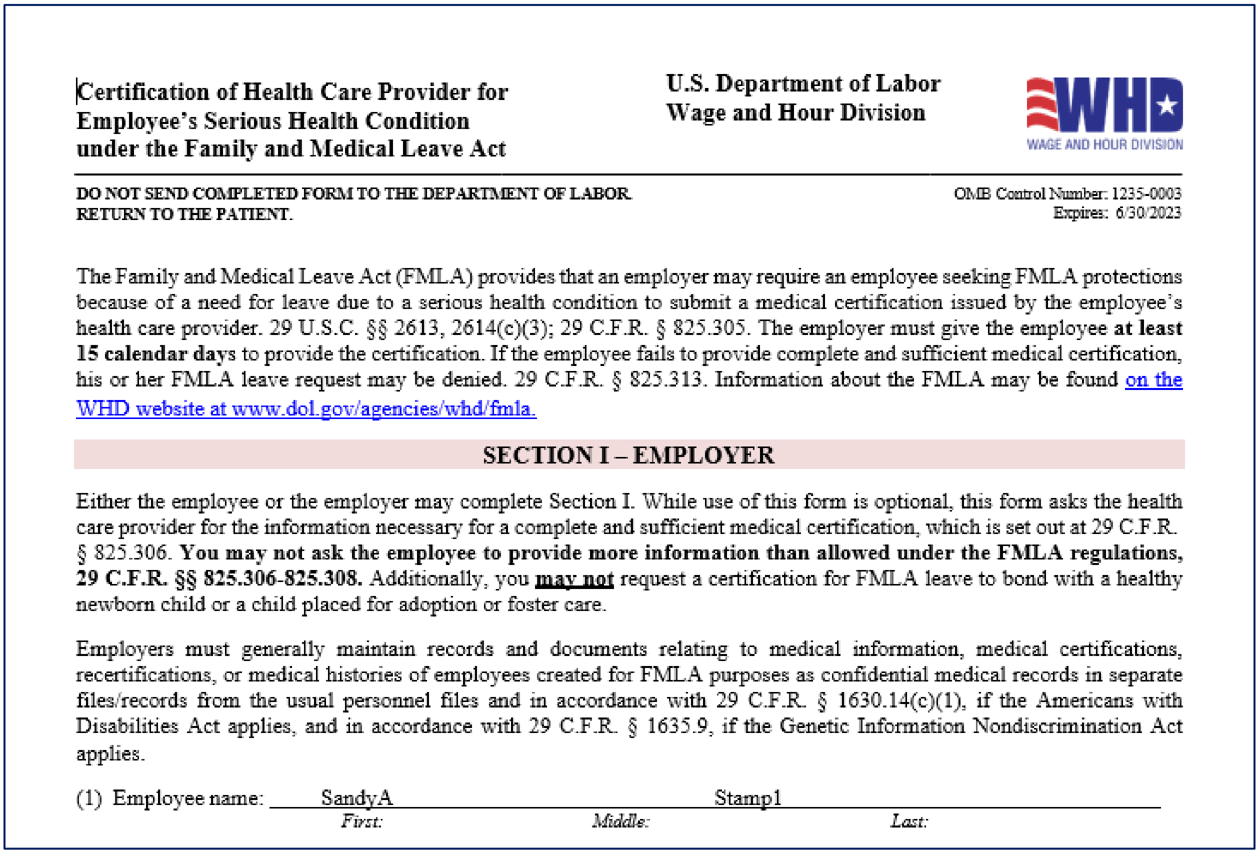
The message below displays at the bottom of the page.

8. Select **Open**.

The selected document opens for viewing and will be populated with the appropriate case information, as in the sample below. It will open in Protected View.

9. Select the **Enable Editing** button in Microsoft Word. This will allow the document to be saved.





Certification of Health Care Provider for Employee's Serious Health Condition under the Family and Medical Leave Act

U.S. Department of Labor
Wage and Hour Division

WHD WAGE AND HOUR DIVISION

DO NOT SEND COMPLETED FORM TO THE DEPARTMENT OF LABOR.
RETURN TO THE PATIENT.

OMB Control Number: 1235-0003
Expires: 6/30/2023

The Family and Medical Leave Act (FMLA) provides that an employer may require an employee seeking FMLA protections because of a need for leave due to a serious health condition to submit a medical certification issued by the employee's health care provider. 29 U.S.C. §§ 2613, 2614(c)(3); 29 C.F.R. § 825.305. The employer must give the employee **at least 15 calendar days** to provide the certification. If the employee fails to provide complete and sufficient medical certification, his or her FMLA leave request may be denied. 29 C.F.R. § 825.313. Information about the FMLA may be found on the WHD website at www.dol.gov/agencies/whd/fmla.

SECTION I – EMPLOYER

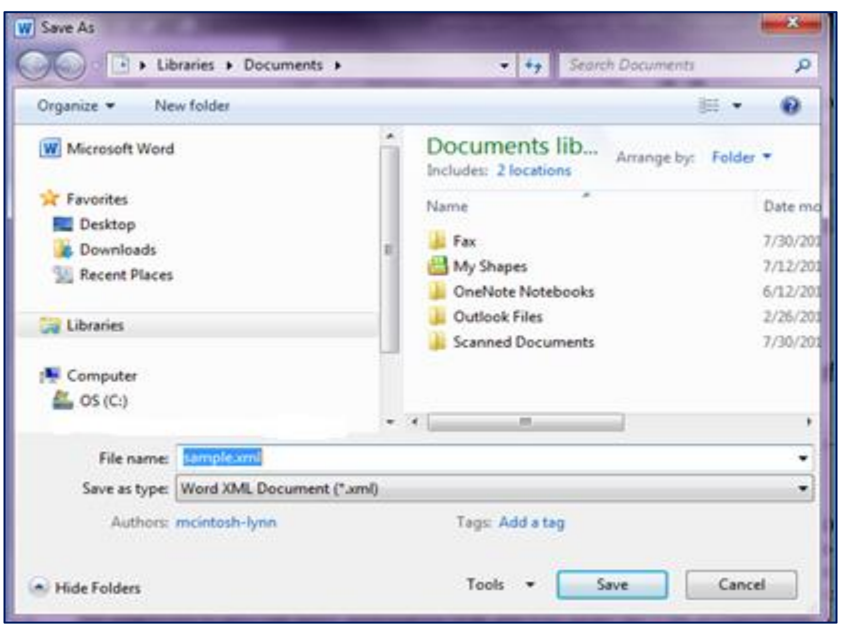
Either the employee or the employer may complete Section I. While use of this form is optional, this form asks the health care provider for the information necessary for a complete and sufficient medical certification, which is set out at 29 C.F.R. § 825.306. **You may not ask the employee to provide more information than allowed under the FMLA regulations, 29 C.F.R. §§ 825.306-825.308.** Additionally, you **may not** request a certification for FMLA leave to bond with a healthy newborn child or a child placed for adoption or foster care.

Employers must generally maintain records and documents relating to medical information, medical certifications, recertifications, or medical histories of employees created for FMLA purposes as confidential medical records in separate files/records from the usual personnel files and in accordance with 29 C.F.R. § 1630.14(c)(1), if the Americans with Disabilities Act applies, and in accordance with 29 C.F.R. § 1635.9, if the Genetic Information Nondiscrimination Act applies.

(1) Employee name: SandyA Stamp1
First: *Middle:* *Last:*

Before sending to the employee, key the applicable data in the fields for each form. Then save the document.

10. Select **File>Save As.** The **Save As** screen displays with the default file name.



11. Save the sample document with a different file name and type.

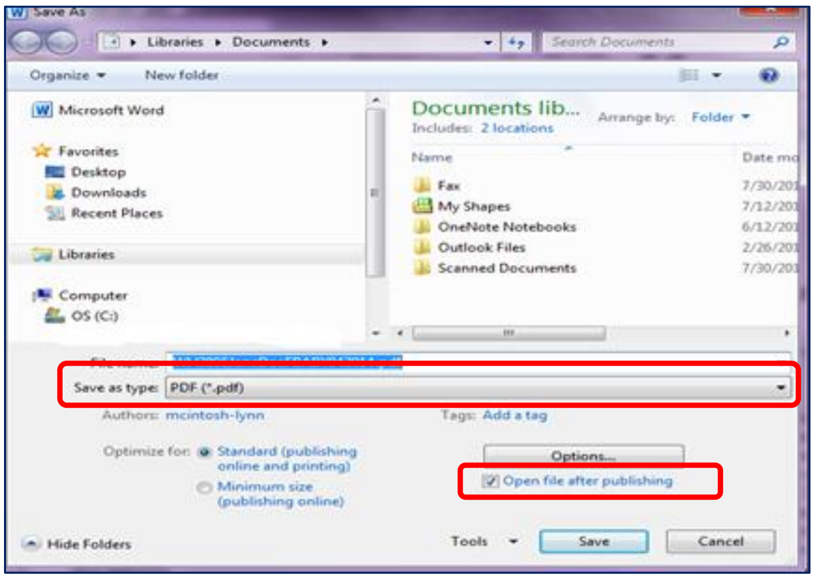
NOTE: The recommended standard for saving these documents is:

- Employee name
- Document name
- Start date of the case

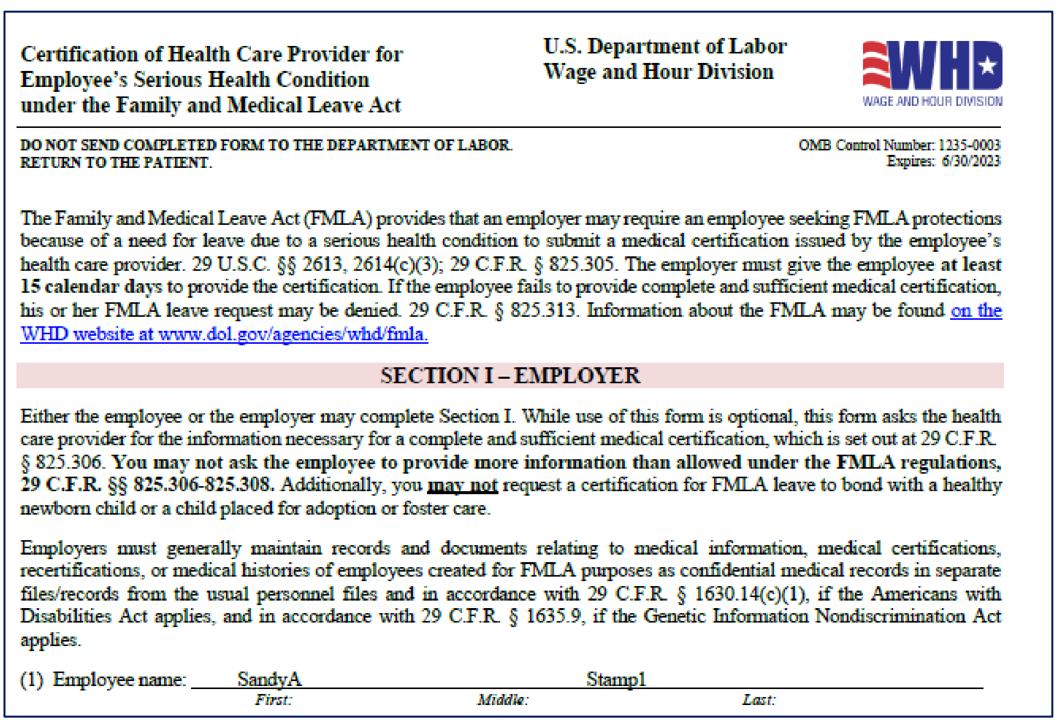
For example: **JohnDoeWH380E043014.pdf**

Change the file name to the standard, as above.

12. From the **Save as** type drop-down, select **PDF (*.pdf)**. Leave the **Open file after publishing** check box selected. Then select **Save**.



The file opens in Adobe Reader and may now be printed or attached to an email for the employee.



Certification of Health Care Provider for Employee's Serious Health Condition under the Family and Medical Leave Act

U.S. Department of Labor
Wage and Hour Division

DO NOT SEND COMPLETED FORM TO THE DEPARTMENT OF LABOR.
RETURN TO THE PATIENT.

OMB Control Number: 1235-0003
Expires: 6/30/2023

The Family and Medical Leave Act (FMLA) provides that an employer may require an employee seeking FMLA protections because of a need for leave due to a serious health condition to submit a medical certification issued by the employee's health care provider. 29 U.S.C. §§ 2613, 2614(c)(3); 29 C.F.R. § 825.305. The employer must give the employee **at least 15 calendar days** to provide the certification. If the employee fails to provide complete and sufficient medical certification, his or her FMLA leave request may be denied. 29 C.F.R. § 825.313. Information about the FMLA may be found on the WHD website at www.dol.gov/agencies/whd/fmla.

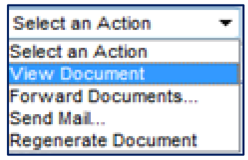
SECTION I – EMPLOYER

Either the employee or the employer may complete Section I. While use of this form is optional, this form asks the health care provider for the information necessary for a complete and sufficient medical certification, which is set out at 29 C.F.R. § 825.306. **You may not ask the employee to provide more information than allowed under the FMLA regulations, 29 C.F.R. §§ 825.306-825.308.** Additionally, you **may not** request a certification for FMLA leave to bond with a healthy newborn child or a child placed for adoption or foster care.

Employers must generally maintain records and documents relating to medical information, medical certifications, recertifications, or medical histories of employees created for FMLA purposes as confidential medical records in separate files/records from the usual personnel files and in accordance with 29 C.F.R. § 1630.14(c)(1), if the Americans with Disabilities Act applies, and in accordance with 29 C.F.R. § 1635.9, if the Genetic Information Nondiscrimination Act applies.

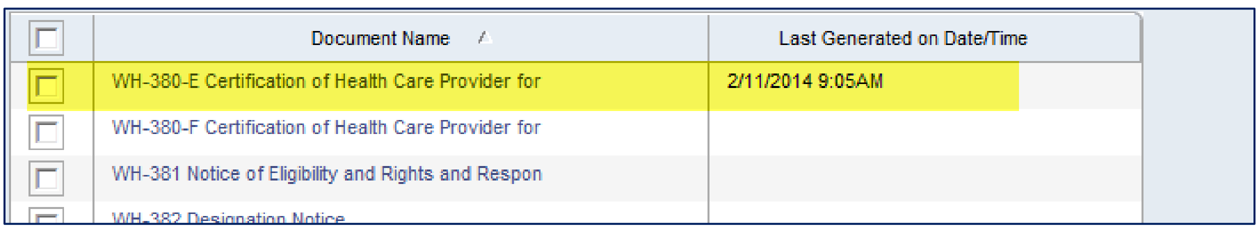
(1) Employee name: SandyA (*First:*) (*Middle:*) Stamp1 (*Last:*)

Information about Sending Documents



- **View Document** opens the selected document and allows saving and sending.
- **Forward Document – Do Not Use – this will forward a document link that will not be activated.**
- **Send mail** can be used to send a reminder to the employee's Inbox and/or Agency email for any needed or missing information.
- **Regenerate Document** is referenced in the paragraph below.

Once **View Document** is selected above and the document is viewed/saved, the date and time will populate in the **Last Generated on Date/Time** field, as below. If the document needs to be regenerated for any reason, select **Regenerate Document** from the **Select an Action** drop-down. The document may then be changed and resent to the employee if needed. The **Last Generated on Date/Time** column for the document will be updated.

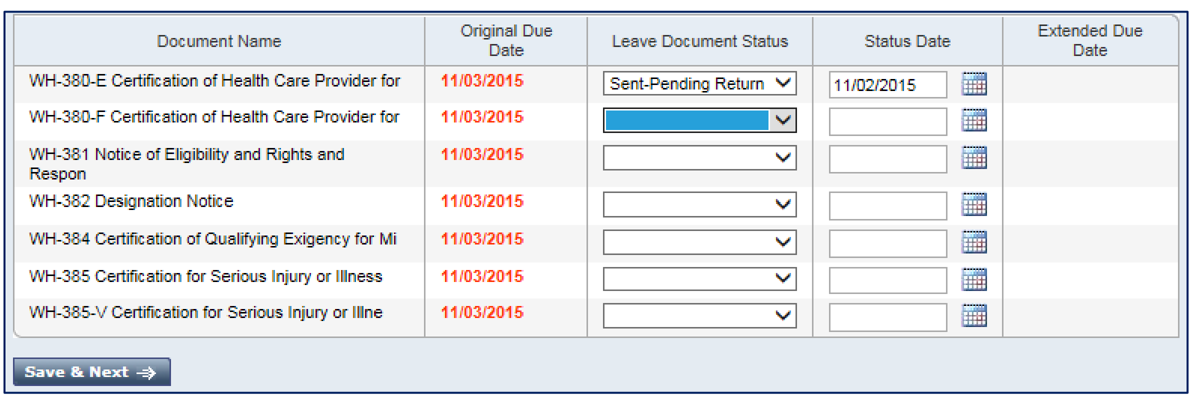


	Document Name	Last Generated on Date/Time
	WH-380-E Certification of Health Care Provider for	2/11/2014 9:05AM
	WH-380-F Certification of Health Care Provider for	
	WH-381 Notice of Eligibility and Rights and Respon	
	WH-382 Designation Notice	

13. Select **Save & Next** to go to the **Document Status** screen.

Document Status Screen

14. Select the appropriate **Leave Document Status** for the documents sent to the employee as well as the status date.

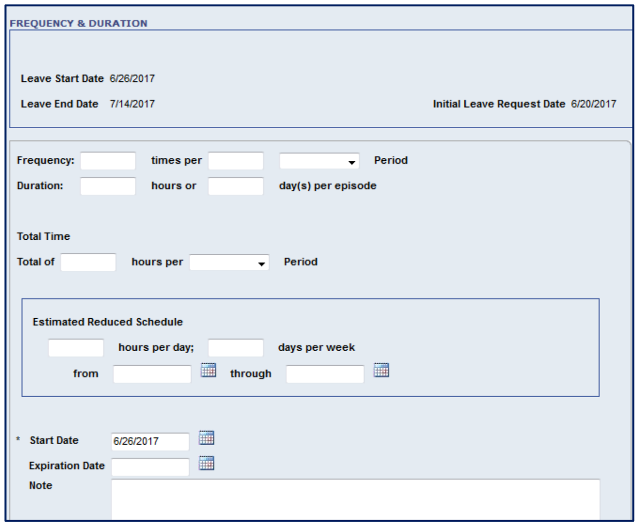


Document Name	Original Due Date	Leave Document Status	Status Date	Extended Due Date
WH-380-E Certification of Health Care Provider for	11/03/2015	Sent-Pending Return	11/02/2015	
WH-380-F Certification of Health Care Provider for	11/03/2015			
WH-381 Notice of Eligibility and Rights and Respon	11/03/2015			
WH-382 Designation Notice	11/03/2015			
WH-384 Certification of Qualifying Exigency for Mi	11/03/2015			
WH-385 Certification for Serious Injury or Illness	11/03/2015			
WH-385-V Certification for Serious Injury or Illne	11/03/2015			

15. Select the **Save & Next** button to go to the **Frequency & Duration** screen.

Frequency & Duration Screen

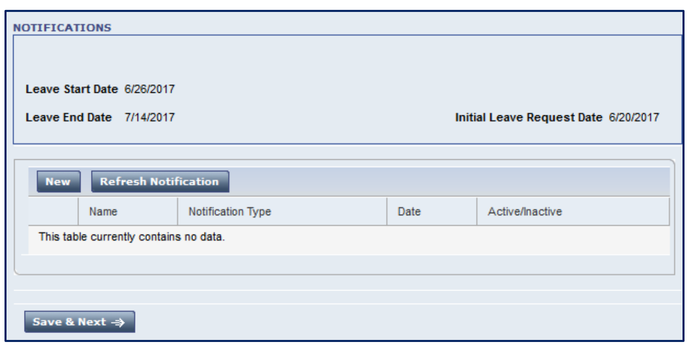
The **Frequency & Duration** screen allows administrators to enter the anticipated frequency and duration of leave episodes in the leave case. This will most commonly be used for intermittent cases.



16. Add any needed information to this screen.
17. Select **Save & Next** to go to the **Notifications** screen.

Notifications Screen

The **Notifications** screen is not currently used.



18. Select the **Save & Next** button to go to the **Employment Status** screen.

Employment Status Screen

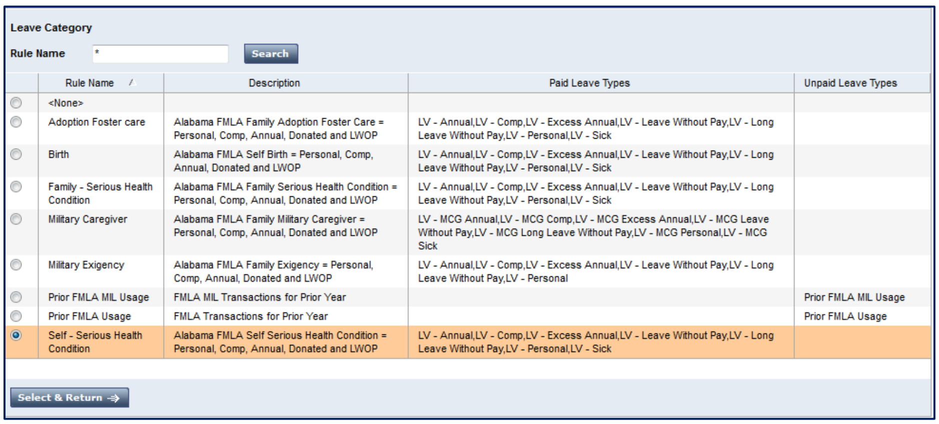
The screen below is informational only. The **Length of Service** may be keyed if desired.

19. Select the **Save & Next** button to go to the **Leave Rules** screen.

Leave Rules Screen

The appropriate leave rule must be selected from the **Leave Rule** screen.

20. Click on the arrow in the **Leave Rule** column.
21. Once the arrow is selected, the **Select Leave Rule** screen will display.



22. Select the appropriate **Leave Rule** for the case.
23. Click the **Select & Return** button.
24. The leave rule displays on the **Leave Rules** page.
25. **Save** the Leave Rule.

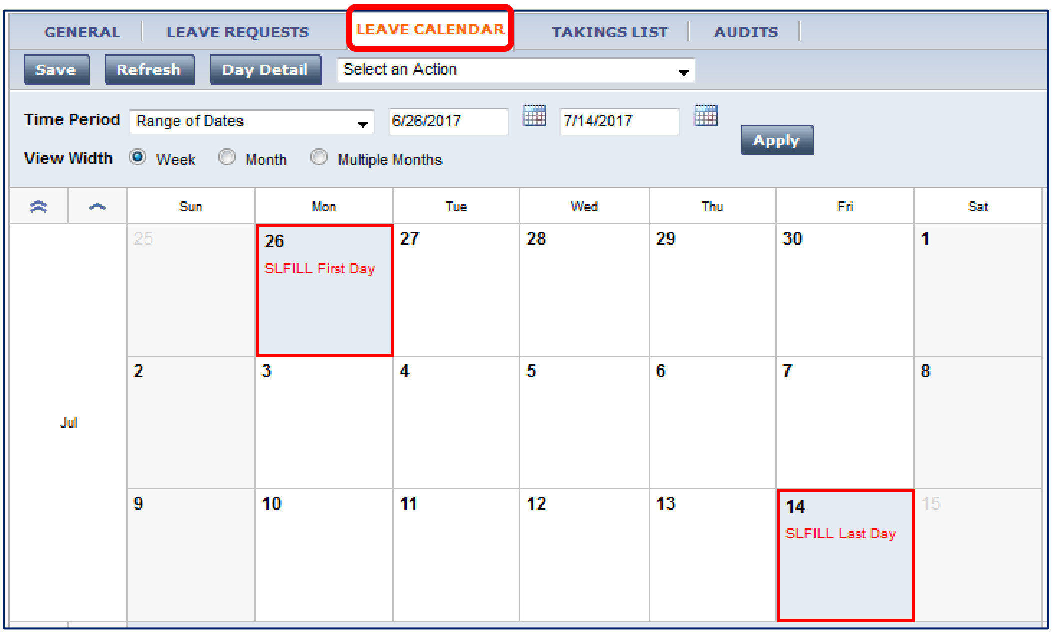
At this point the case has been opened. The next step is to project and commit the time to the employee's timecard.

Projecting and Committing Time from the Leave Calendar

Projecting Time from the Leave Calendar

Projecting the time before committing allows the Leave Administrator to see the order the employee's leave will be used. Project the leave time through the end date of the case.

1. Select the **Leave Calendar** tab.
2. When the **Leave Calendar** displays, select or verify the range of dates for the case.



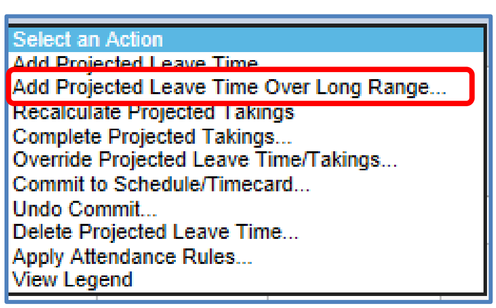
3. Open the **Select an Action** drop-down list to project Leave time.

NOTE: To add time to a *continuous* Leave case, select **Add Projected Leave Time Over Long Range…**

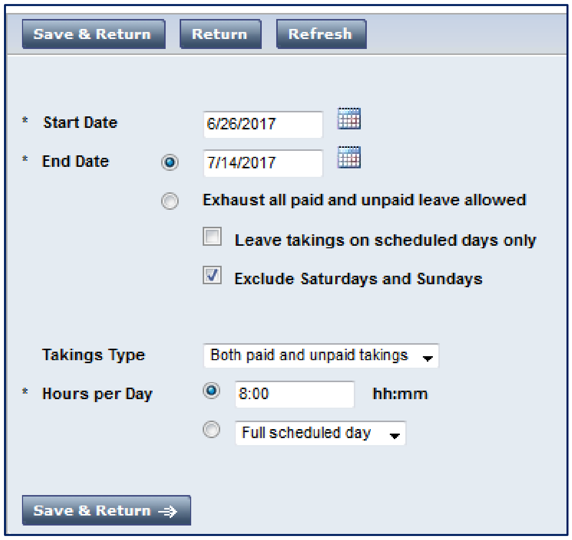
Or, if the Leave case is *intermittent*, select **Add Projected Leave Time…** instead. This will add leave time to the first day of the case. Any additional hours may be added later, or by the manager through the **Quick Leave Editor** or directly into the employee's timecard.

An employee may also submit a time off request for an open and approved leave case. See the **Employee Pay Codes for Time Off Requests** job aid for this process.

4. Select **Add Projected Leave Time Over Long Range…** The screen below displays.

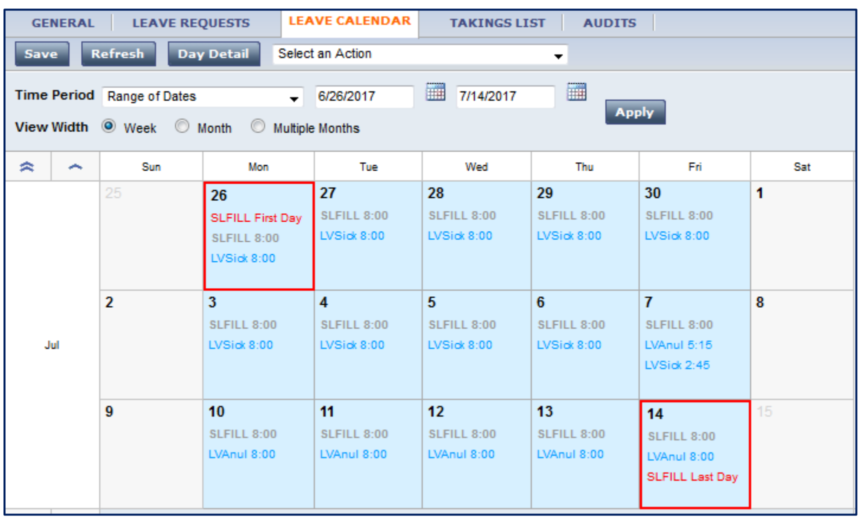


5. Complete the appropriate fields.

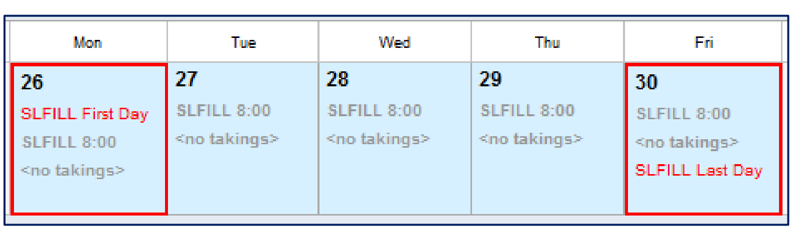


6. Select **Save & Return.**

The **Leave Calendar** will be populated with the leave takings. The font will display in light, unbolded colors since the time is "projected" only. Once the time is committed to the Timecard, the font color will display in bold print.



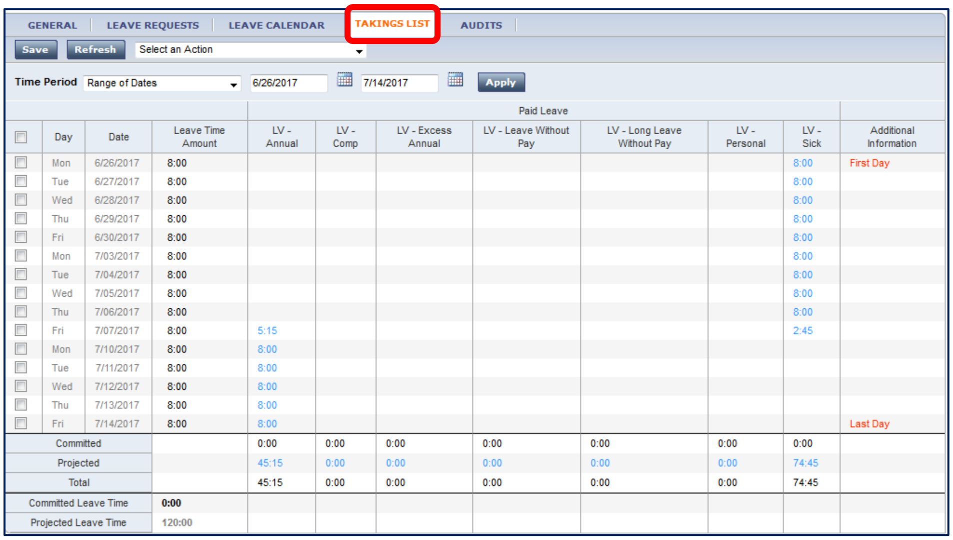
NOTE: The projection automatically verifies the employee's FMLA Tracking balance and reduces it accordingly. If the employee does not have a sufficient FMLA Tracking balance for the above projection, the calendar will populate with <no takings> on the date(s) for which there is an insufficient balance. The employee cannot use FMLA leave at this point. A different type of leave or **Leave Without Pay** must be used.



Another way to view the actual leave takings is to select the **Takings List** tab. This screen will provide a better view of the order of the takings.

In the example below, Sick Leave is used first, based on the type of case. Once depleted, the system will use the next available balance, based on the Leave Cascade.

NOTE: See **Extended Leave Cascade** job aid or the **Appendix** section of this guide.



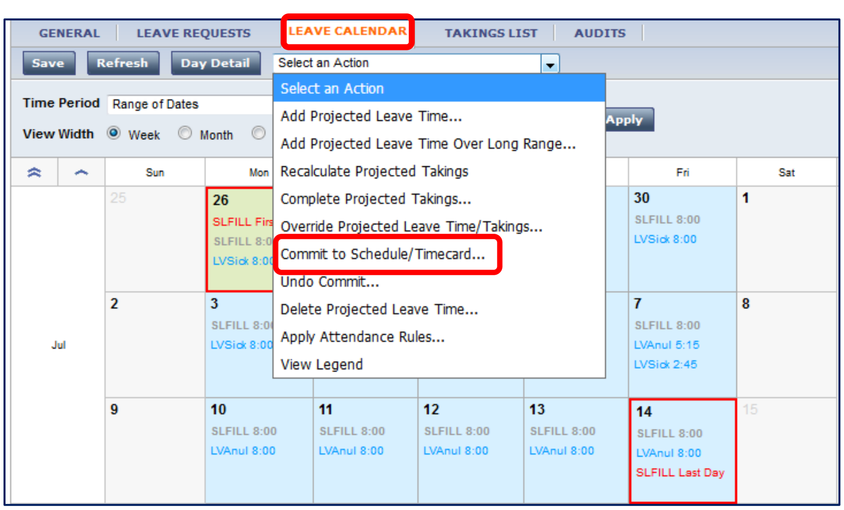
				Paid Leave							
	Day	Date	Leave Time Amount	LV - Annual	LV - Comp	LV - Excess Annual	LV - Leave Without Pay	LV - Long Leave Without Pay	LV - Personal	LV - Sick	Additional Information
	Mon	6/26/2017	8:00							8:00	First Day
	Tue	6/27/2017	8:00							8:00	
	Wed	6/28/2017	8:00							8:00	
	Thu	6/29/2017	8:00							8:00	
	Fri	6/30/2017	8:00							8:00	
	Mon	7/03/2017	8:00							8:00	
	Tue	7/04/2017	8:00							8:00	
	Wed	7/05/2017	8:00							8:00	
	Thu	7/06/2017	8:00							8:00	
	Fri	7/07/2017	8:00	5:15						2:45	
	Mon	7/10/2017	8:00	8:00							
	Tue	7/11/2017	8:00	8:00							
	Wed	7/12/2017	8:00	8:00							
	Thu	7/13/2017	8:00	8:00							
	Fri	7/14/2017	8:00	8:00							Last Day
Committed				0:00	0:00	0:00	0:00	0:00	0:00	0:00	
Projected				45:15	0:00	0:00	0:00	0:00	0:00	74:45	
Total				45:15	0:00	0:00	0:00	0:00	0:00	74:45	
Committed Leave Time			0:00								
Projected Leave Time			120:00								

7. If the leave takings are correct, the time may now be committed to the timecard.

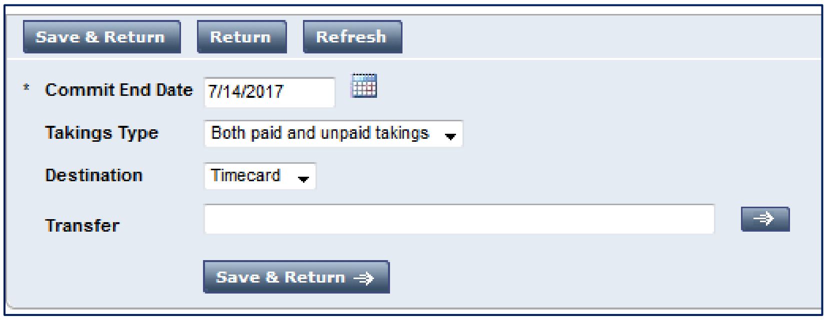
Committing Time for a Continuous Case

Committing the time allows the Leave Administrator to add time for the leave case to the employee's timecard. Commit the leave time through the end of the **next pay period or the first Holiday**, whichever comes first. If desired, the pay codes for the leave may be added directly into the timecard. However, this method ensures the time is used in the order projected.

8. Return to the **Leave Calendar** tab.
9. Click the **End Date** to which time is to be committed in calendar.
10. Select **Commit to Schedule/Timecard…**from the **Select an Action** drop-down.

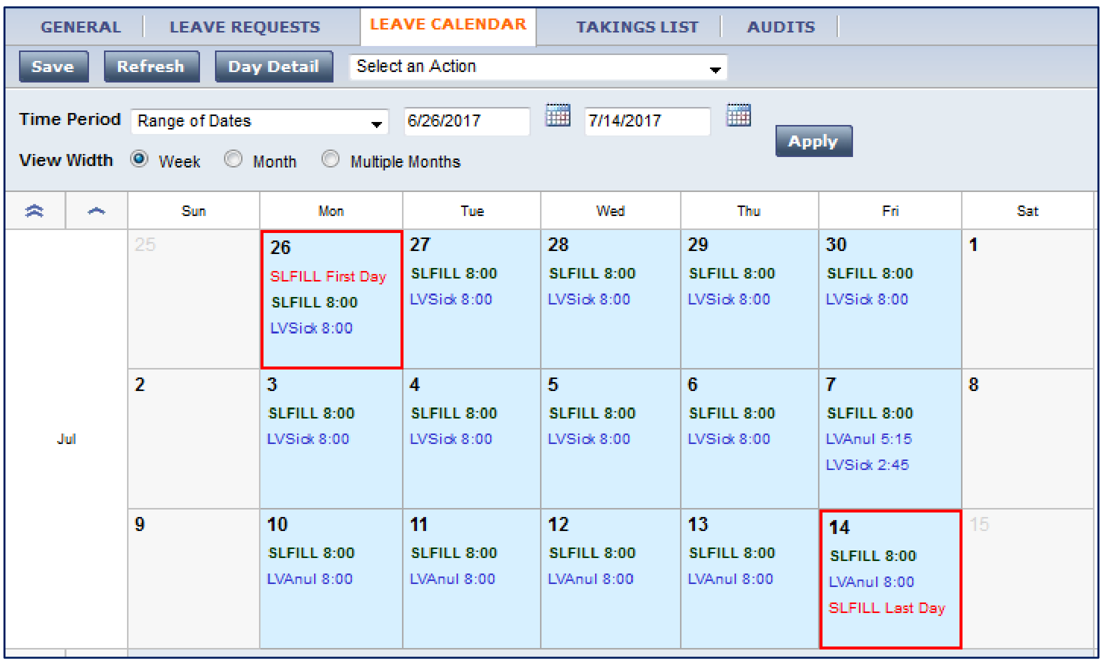


The screen below displays.

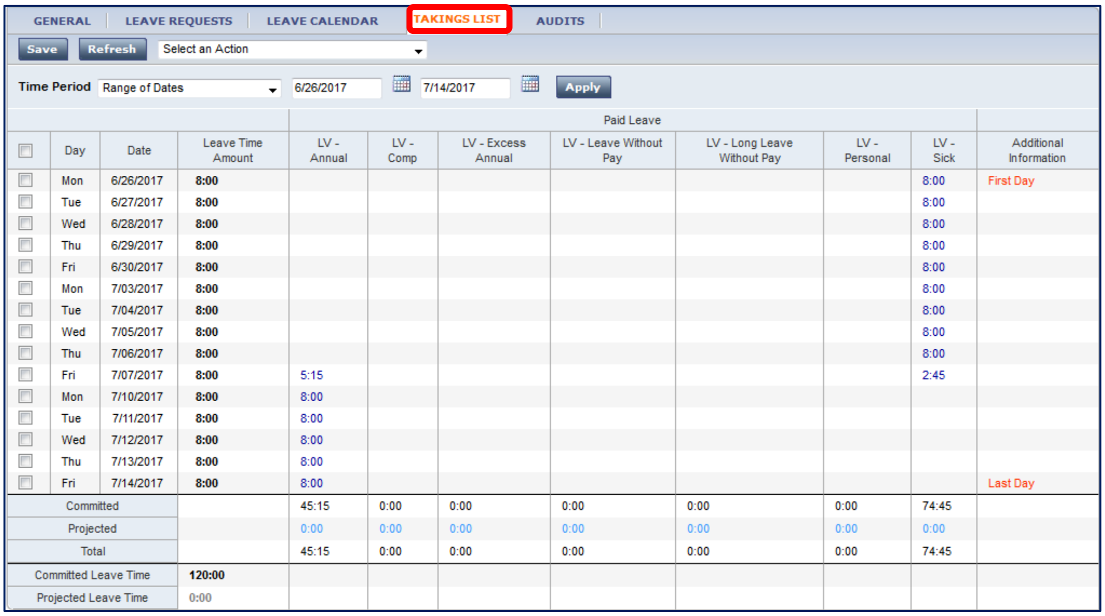


11. Verify or select the end date for the committed time and complete the appropriate fields.
12. Select **Save & Return**.

Leave Calendar view of the same dates. The font displays in dark, bold colors now that the time has been committed to the timecard.

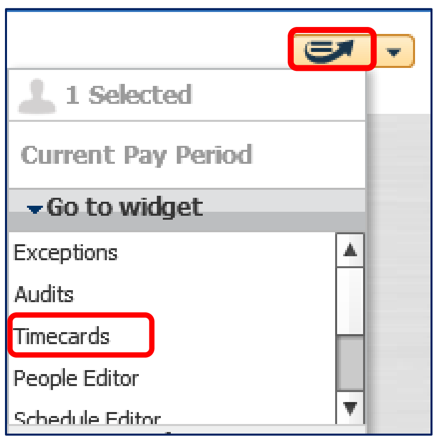


To view the order of the takings, select the **Takings List** tab. Notice that the committed days are darker than the projected days in the screen shot below.



				Paid Leave							
	Day	Date	Leave Time Amount	LV - Annual	LV - Comp	LV - Excess Annual	LV - Leave Without Pay	LV - Long Leave Without Pay	LV - Personal	LV - Sick	Additional Information
	Mon	6/26/2017	8:00							8:00	First Day
	Tue	6/27/2017	8:00							8:00	
	Wed	6/28/2017	8:00							8:00	
	Thu	6/29/2017	8:00							8:00	
	Fri	6/30/2017	8:00							8:00	
	Mon	7/03/2017	8:00							8:00	
	Tue	7/04/2017	8:00							8:00	
	Wed	7/05/2017	8:00							8:00	
	Thu	7/06/2017	8:00							8:00	
	Fri	7/07/2017	8:00	5:15						2:45	
	Mon	7/10/2017	8:00	8:00							
	Tue	7/11/2017	8:00	8:00							
	Wed	7/12/2017	8:00	8:00							
	Thu	7/13/2017	8:00	8:00							
	Fri	7/14/2017	8:00	8:00							Last Day
Committed				45:15	0:00	0:00	0:00	0:00	0:00	74:45	
Projected				0:00	0:00	0:00	0:00	0:00	0:00	0:00	
Total				45:15	0:00	0:00	0:00	0:00	0:00	74:45	
Committed Leave Time			120:00								
Projected Leave Time			0:00								

13. Select the **Go To** menu and select **Timecards** to verify the committed dates.



Timecard for the pay period displays.

Date	Pay Code	Amount
Mon 6/26	LV - SICK LEAVE TAKEN	8:00
Tue 6/27	LV - SICK LEAVE TAKEN	8:00
Wed 6/28	LV - SICK LEAVE TAKEN	8:00
Thu 6/29	LV - SICK LEAVE TAKEN	8:00
Fri 6/30	LV - SICK LEAVE TAKEN	8:00
Sat 7/01		
Sun 7/02		
Mon 7/03	LV - SICK LEAVE TAKEN	8:00
Tue 7/04	LV - SICK LEAVE TAKEN	8:00
Wed 7/05	LV - SICK LEAVE TAKEN	8:00
Thu 7/06	LV - SICK LEAVE TAKEN	8:00
Fri 7/07	LV - ANNUAL LEAVE TAKEN	5:15
	LV - SICK LEAVE TAKEN	2:45
Sat 7/08		
Sun 7/09		
Mon 7/10	LV - ANNUAL LEAVE TAKEN	8:00
Tue 7/11	LV - ANNUAL LEAVE TAKEN	8:00
Wed 7/12	LV - ANNUAL LEAVE TAKEN	8:00
Thu 7/13	LV - ANNUAL LEAVE TAKEN	8:00
Fri 7/14	LV - ANNUAL LEAVE TAKEN	8:00

Best Business Practice

The best practice is to:

- **Add Projected Time Over Long Range** to the end of the case.
- **Commit** the time through the end of the **next pay period or the first Holiday**, whichever comes first.

Removing Time Committed on a Holiday

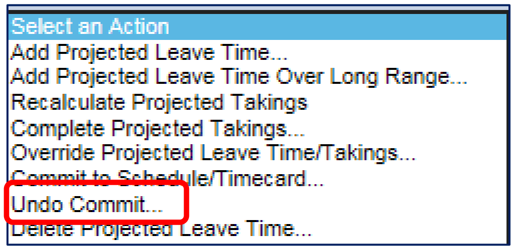
If the time was projected for a long range that included a Holiday, it can be easily corrected. In this example, a few extra steps are needed for this time to display correctly in the timecard.

Tue 7/04	LV - SICK LEAVE TAKEN	8:00

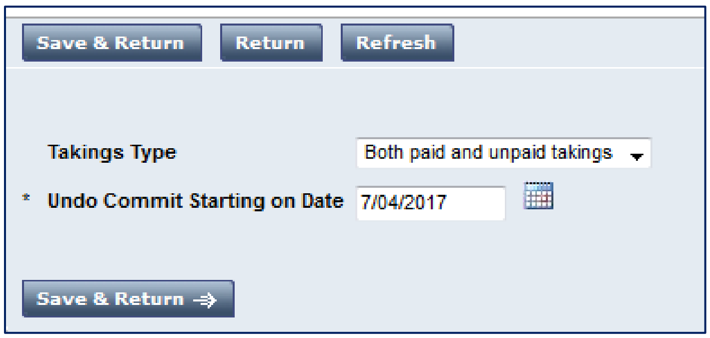
1. To correct this, navigate back to the **Leave Case Editor**.
2. Click on the **Leave Calendar** tab.
3. Click on the **Holiday Date(s)** to select**.**

Mon	Tue	Wed	Thu	Fri
26 SLFILL First Day SLFILL 8:00 LVSick 8:00	27 SLFILL 8:00 LVSick 8:00	28 SLFILL 8:00 LVSick 8:00	29 SLFILL 8:00 LVSick 8:00	30 SLFILL 8:00 LVSick 8:00
3 SLFILL 8:00 LVSick 8:00	4 SLFILL 8:00 LVSick 8:00	5 SLFILL 8:00 LVSick 8:00	6 SLFILL 8:00 LVSick 8:00	7 SLFILL 8:00 LVAnul 5:15 LVSick 2:45
10 SLFILL 8:00 LVAnul 8:00	11 SLFILL 8:00 LVAnul 8:00	12 SLFILL 8:00 LVAnul 8:00	13 SLFILL 8:00 LVAnul 8:00	14 SLFILL 8:00 LVAnul 8:00 SLFILL Last Day

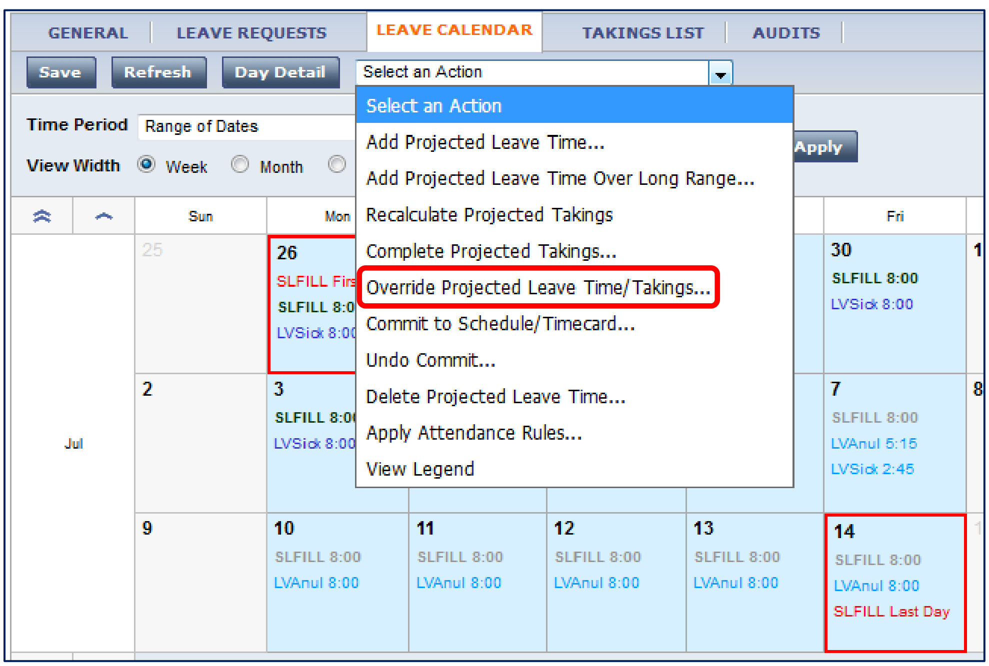
4. Select **Undo Commit** from the **Select an Action** drop-down**.**



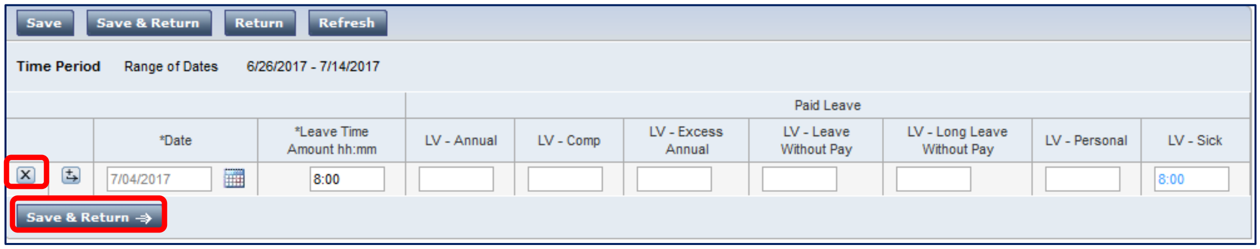
5. Verify the date and edit if needed.
6. Then select **Save & Return** from the screen below.



7. Once the time is no longer committed, select the date on the calendar again. Select **Override Projected Leave Time/Takings** from the **Select an Action** drop-down.

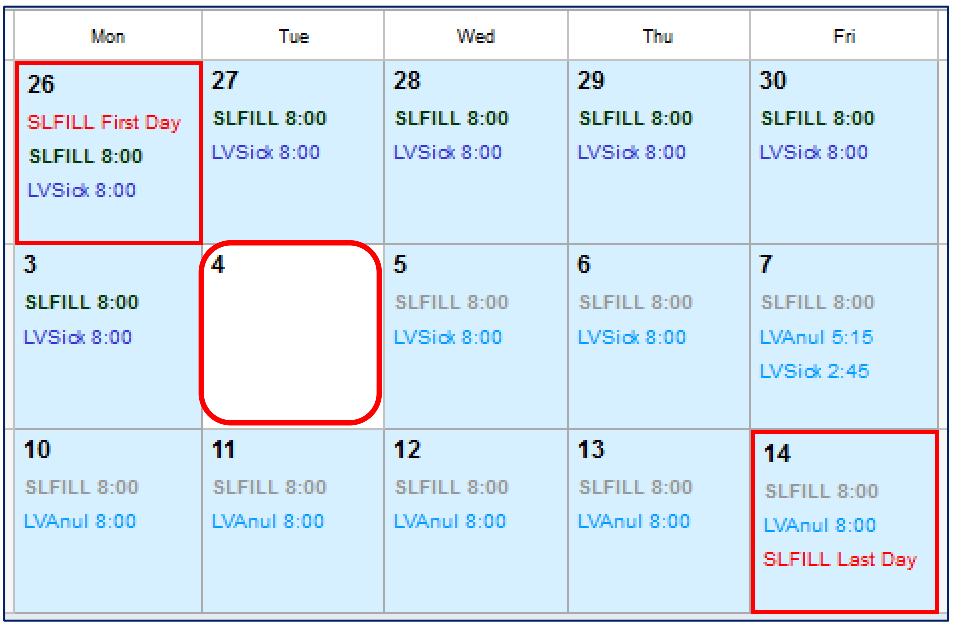


8. The **Override Projected Leave Time/Takings** screen will display as below. Delete the amount from any field where one is present or click the **X** on the far left of the row to remove all takings for that date.

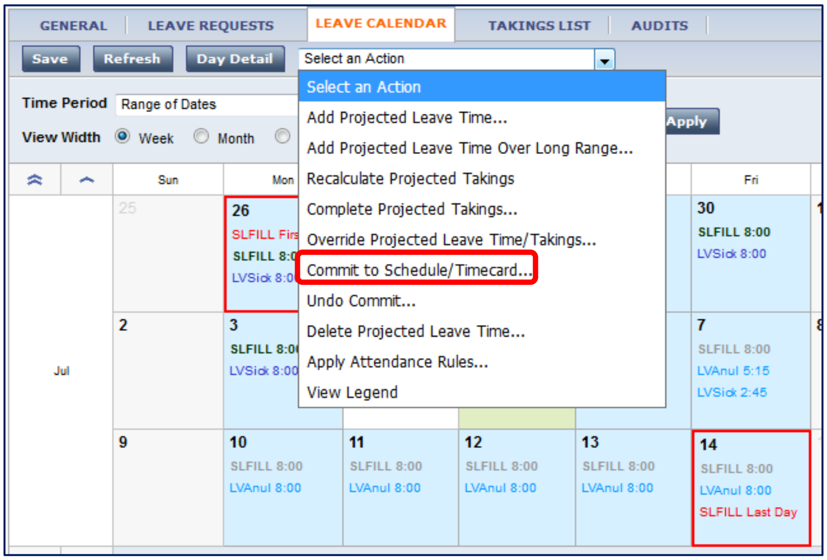


9. Then select **Save & Return**.

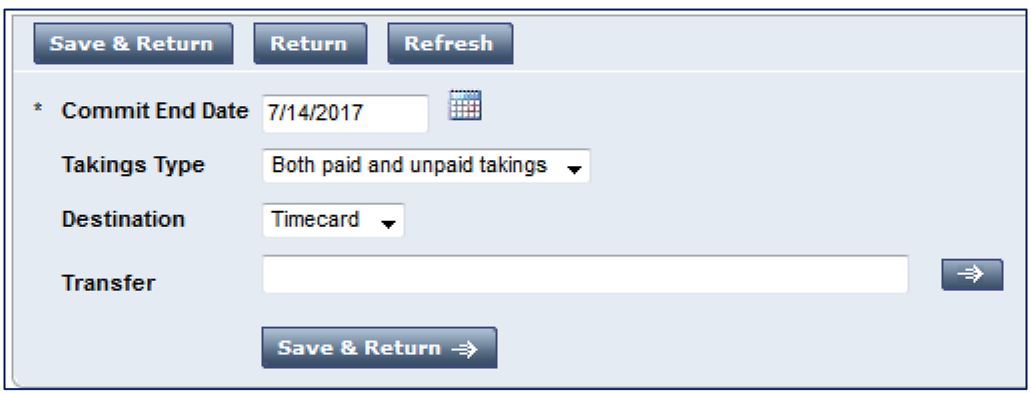
The **Leave Calendar** now displays the holiday correctly.



10. The time will now need to be re-committed to the timecard, starting on the day following the Holiday, to display correctly.
11. In the **Leave Calendar**, select the **End Date** through which time is to be committed.
12. Select **Commit to Schedule/Timecard** from the **Select an Action** drop-down.



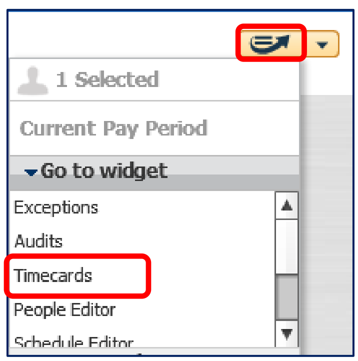
13. The screen below displays.



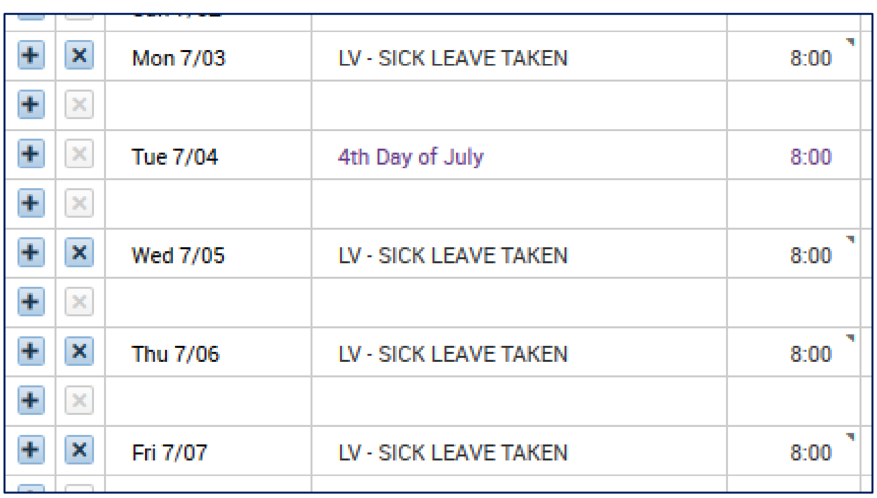
14. Verify the **Commit End Date** field populated correctly and if not, select the end date from the calendar icon**.** Verify the information on the screen.
15. Select **Save & Return**.

16. Verify the committed time on the calendar.

17. Select the **Go To** menu and select **Timecards** to verify the committed dates.



View the employee timecard to verify that the Holiday is displaying correctly and no longer has committed leave time for that day.



Other Types of Leave Cases

<u>Long Leave Without Pay</u>

Using the Leave Cascade

To use the Leave Cascade, the **Paid Leave Types** should remain selected, as below. If the employee depletes the leave balances, the cascade will automatically apply **LV-Leave Without Pay**.


Eligibility Requirements have been bypassed.

* Leave Balances as of 10/12/2020 Apply

Check Eligibility

Bypass Eligibility Check

Grant Leave

Use in this Leave Case	Paid Leave Type	Committed Hours	Available Balance
☑	LV - Annual	0:00	54:35
☑	LV - Comp	0:00	0:00
☑	LV - Excess Annual	0:00	81:15
☑	LV - Excess Sick	0:00	0:00
☑	LV - Leave Without Pay	0:00	9999:00
☑	LV - Long Leave Without Pay	0:00	9999:00
☑	LV - Personal	0:00	0:00
☑	LV - Sick	0:00	66:55

To set up a case for **Long Leave Without Pay**, all other **Paid Leave Types** must be **unchecked.** That is, uncheck all “Paid Leave Types” EXCEPT **LV-Long Leave Without Pay.**


Eligibility Requirements have been bypassed.

* Leave Balances as of 10/12/2020 Apply

Check Eligibility

Bypass Eligibility Check

Grant Leave

Use in this Leave Case	Paid Leave Type	Committed Hours	Available Balance
☐	LV - Annual	0:00	54:35
☐	LV - Comp	0:00	0:00
☐	LV - Excess Annual	0:00	81:15
☐	LV - Excess Sick	0:00	0:00
☐	LV - Leave Without Pay	0:00	9999:00
☑	LV - Long Leave Without Pay	0:00	9999:00
☐	LV - Personal	0:00	0:00
☐	LV - Sick	0:00	66:55

NOTE: If **LV – Long Leave Without Pay** is selected **with** other leave types that **have a balance**, only the <u>other types</u> will be used. That is **LV-Long Leave Without Pay** will **NOT** be used.

But, if **LV – Long Leave Without Pay** is selected **with** other leave types that **DO NOT** have a balance, only **LV – Long Leave Without Pay** will be used.

<u>Non-FMLA Long Leave Without Pay</u>

If an employee has been on leave without pay that is not related to an FMLA case for 19 consecutive days, there is no leave case to be opened in eSTART. From the employee’s timecard, select the **ULLWP-Tracking** pay code and enter the associated number of hours.

Military Leave

Military Leave <u>does not cascade</u> through the leave types. Since all paid leave types are selected by default, any that are not to be used **<u>must be unselected</u>**.

NOTE: If more than one paid leave type remains selected, <u>ALL</u> selected types will be used. That is, the employee will be erroneously charged time from <u>each</u> selected type.

In the example below, **LV-Long Military Leave Without Pay** will be used. All other paid leave types must be unchecked.

Eligibility Requirements have been bypassed.

* Leave Balances as of 10/12/2020 Apply

Check Eligibility

Bypass Eligibility Check

Grant Leave

Use in this Leave Case	Paid Leave Type	Committed Hours	Available Balance
☐	LV - Annual Leave Non FMLA	0:00	54:35
☐	LV - Comp Time Non FMLA	0:00	0:00
☐	LV - Excess Annual Non FMLA	0:00	81:15
☐	LV - Excess Sick Non FMLA	0:00	0:00
☐	LV - Holiday Non FMLA	0:00	8:00
☑	LV - Long Military Leave Without Pay	0:00	9999:00
☐	LV - Military Leave Without Pay	0:00	9999:00
☐	LV - Personal Non FMLA	0:00	0:00
☐	LV - Sick Non FMLA	0:00	66:55
☐	Military Leave - Federal	0:00	168:00

Once takings have been projected, the calendar displays with leave time charged only to one paid leave type. This is correct. The time can now be committed to the timecard.

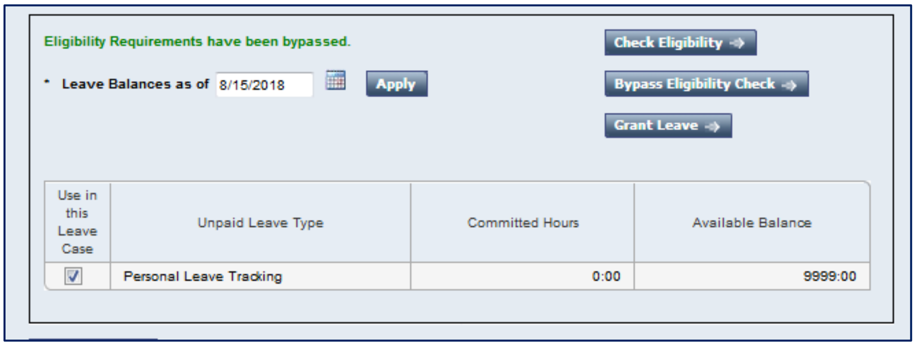
NOTE: If any projected, uncommitted time is in the calendar when a leave type is changed, the projected, uncommitted time **will be changed** to the new leave type. Committed time will not be changed.

Mon	Tue	Wed	Thu	Fri
12 MILFED First Day MILFED 8:00 LMLWOP 8:00	13 MILFED 8:00 LMLWOP 8:00	14 MILFED 8:00 LMLWOP 8:00	15 MILFED 8:00 LMLWOP 8:00	16 MILFED 8:00 LMLWOP 8:00
19 MILFED 8:00 LMLWOP 8:00	20 MILFED 8:00 LMLWOP 8:00	21 MILFED 8:00 LMLWOP 8:00	22 MILFED 8:00 LMLWOP 8:00	23 MILFED 8:00 LMLWOP 8:00
26 MILFED 8:00 LMLWOP 8:00	27 MILFED 8:00 LMLWOP 8:00	28 MILFED 8:00 LMLWOP 8:00	29 MILFED 8:00 LMLWOP 8:00	30 MILFED 8:00 LMLWOP 8:00 MILFED Last Day

Educational Leave

Educational leave with full or partial pay may be granted to permanent full-time merit system employees if the courses are related to current duties. Requests for educational leave must be submitted in writing in advance and approved by the agency Director and the State Personnel Director prior to use.

An Educational case uses only the **LV-Personal Tracking** for tracking the case.



Once the hours are committed to the timecard, the **LV-Personal Tracking** pay codes will display in the timecard for each day the employee is on Educational leave.

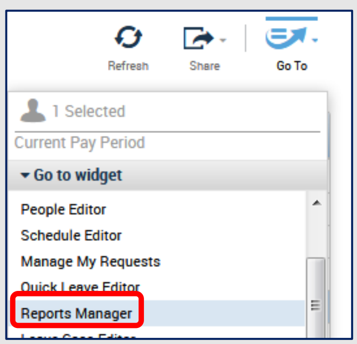
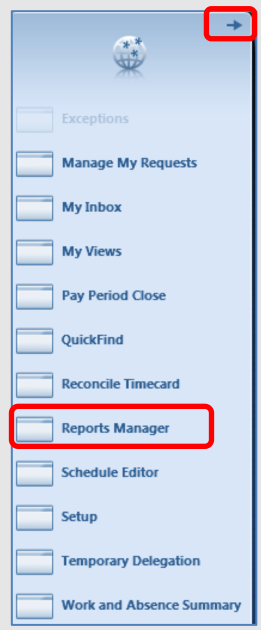
Date	Pay Code	Amount
Mon 8/27	LV - PERSONAL TRACKING	8:00
Tue 8/28	LV - PERSONAL TRACKING	8:00
Wed 8/29	LV - PERSONAL TRACKING	8:00
Thu 8/30	LV - PERSONAL TRACKING	8:00
Fri 8/31	LV - PERSONAL TRACKING	8:00

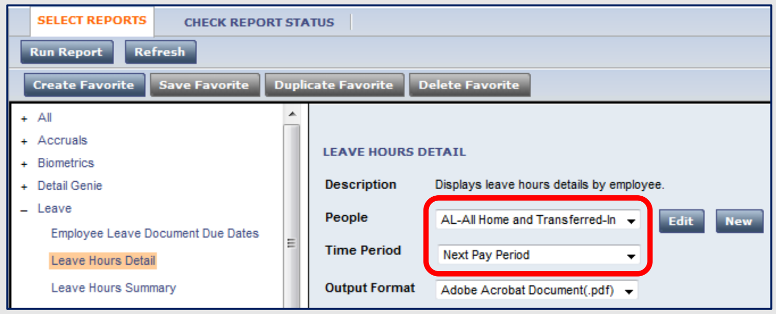
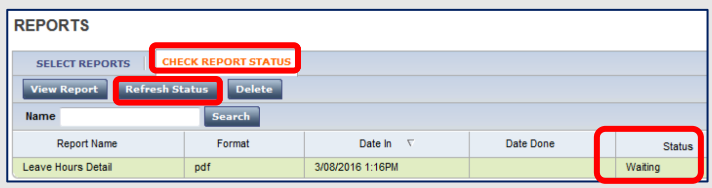
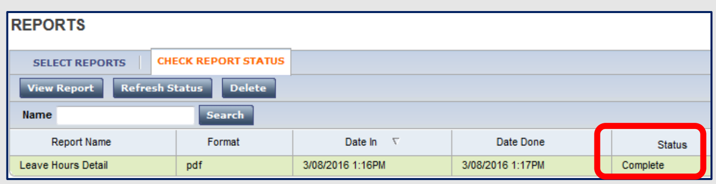
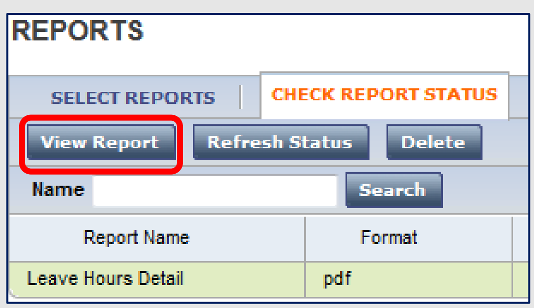
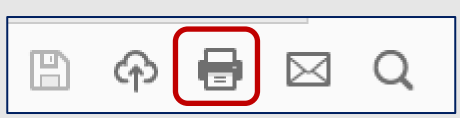
Generating Leave Reports

Employee leave information is available in several different leave reports. You can generate leave reports on a daily, weekly, or pay-period basis, or any time you need information to accomplish your business tasks. For example, you can run the **Leave Hours Detail** report to review the types of leave hours for each shift that has been committed to an employee's timecard.

Example

You want to review Sandy Stamp's leave hours for each shift since she began her leave of absence. Generate the **Leave Hours Detail** report to view this information.

Steps		
1	Select **Sandy Stamp** from the employee listing. Then **Go To>Reports Manager.** (Use this method to select certain employees for your report.) In the **Related Items** pane, click the **arrow** to expand the pane, and select **Reports Manager**. (Use this method if you will use a HyperFind to select the employees for your report.)	 
2	Expand the **Leave** category. Then select the **Leave Hours Detail** report.	

Steps		
3	From the **People** drop-down list, select the group of employees whose leave hours you want to view. From the Time Period drop-down list, select the time period, or select **Range of Dates** and enter the desired time frame.	
4	Click **Run Report**.	
5	You are redirected to the **Check Report Status** tab. Review information in the **Status** column. Click **Refresh Status**. Wait until **Complete** displays in the **Status** column.	 
6	To view the report, click the report name and select **View Report**. (Sample leave reports display in the following section.)	
7	(Optional) To print the report to a local printer, select the **Print** button. The report may also be saved.	

Appendix

Sign-Off Preparation Checklist

The following items must be verified and corrected before performing final sign-off of employee timecards.

NOTE: Sign-off occurs 5 business days before the next payday by 12 noon.

☐	1	Manage My Requests	Verify there are no unapproved Time Off Requests for the previous pay period. These must be Approved or Refused by the Manager.
☐	2	Reconcile Timecard View	Make sure all exceptions have been reviewed. Missing punches and unexcused absences must be corrected unless the absence is due to Leave Without Pay.
☐	3	Employee Hours View	Verify all employees have the correct number of hours for the pay period. Employee hour totals must be in 15-minute increments. Also verify any overtime or compensatory time.
☐	4	Employee Information View	If the agency has board members who are not automatically paid, the amount of pay must be entered in the timecards of the board members. Select the Board Meeting pay code. Then enter the dollar amount of pay in the Amount column.
☐	5	Leave Cases View	Verify that time for employees who have open FMLA or Military cases has been added to the timecards.
☐	6	Pay Period Close View	• Verify there are no employees with a **Needs Update** pay rule. If approvals have not been applied in GHRS by the sign-off date, it may be necessary to enter this employee's time into GHRS. • Verify non-exempt and hourly employees have approved their timecards. • Verify manager approval.
☐	7	Sign-Off	• Arrears employees: Sign-off in **Previous** Pay Period. • Current Employees: Sign-off in **Current** Pay Period. • Board Members: Sign-off in **Previous** Pay Period. **NOTE:** use **Board Members** HyperFind. • Terminated Employees: Sign-off in **Previous** Pay Period. **NOTE**: use **Terminated Employees** HyperFind.
☐	8	Group Edit Results	Verify sign-off results. Click the **Details** link to see any failures. Review the timecards for which sign-off failed and re-apply sign-off. Repeat these steps as needed until all timecards are signed off.
☐	9	SUSF in GHRS	The day after sign-off (the 4th business day before next pay day), verify the documents sent from eSTART to GHRS.
☐	10	SUSF in GHRS	Two days after sign-off (the 3rd business day before next pay day), check for rejected documents. Any corrections must be made in GHRS.
☐	11	Late submission of leave usages	These must be processed in GHRS, which will later post to eSTART as a historical edit.

Automated Sign-Off Removal

Agency Administrators and Timekeepers may have sign-off removed automatically from timecard(s) when needed by using the process below.

IMPORTANT NOTE: DO NOT use this method during the last 30 minutes before the sign-off deadline. There may not be sufficient time to make any corrections to the timecards if the removal occurs during this time frame.

Also, do not attempt to remove sign-offs for 3 hours after the 12-noon deadline as processing will be underway.

1. Select the employee(s) for sign-off removal. Selecting multiple employees will allow you to scroll through the People Editor and enter the values more efficiently.
   a. To select one employee, highlight the employee row from any view, or
   b. To select more than one employee, hold down the **CTRL** key and highlight the employee rows from any view, or
   c. To select all employees, use the **Select All Rows** icon from any view.
2. Next, select **Go To>People Editor>Person>Additional Information.**
3. To remove sign-off, enter one of the following codes in the **Remove Sign Off – P C or B** field:
   a. **P** – to remove sign-off for **Previous Pay Period**.
   b. **C** – to remove sign-off for **Current Pay Period**.
   c. **B** – to remove sign-off for both **Current and Previous Pay Periods**.
4. Select the **Save** button to save the change.
5. If applicable, scroll to the next employee in the list and repeat until complete.

Last Sign Off Removal Request	
Last Sign Off Removal Status	
Remove Sign Off - P C or B	

NOTE:
For **Arrears** employees:

- Previous Pay Period sign-off removal is only allowed prior to the sign-off deadline.
- Current Pay Period sign-off removal is allowed.

For **Current** employees:

- Previous Pay Period sign-off removal is **NOT allowed**.
- Current Pay Period sign-off removal is only allowed prior to the sign-off deadline.

After a value is entered and saved in the field above, an interface will run every 15 minutes on the quarter hour to process the sign-off removals.

Once the process finishes, all Agency Admins and Timekeepers in the agency will receive an email notification stating the success or failure of each sign-off removal. If the sign-off removal failed, the notification will contain the reason for the failure.

After the interface runs, the **Last Sign Off Removal Request** field on the **Additional Information** screen will be updated with the user name, date/time and request type (P, C or B) of the last requested sign-off removal.

Last Sign Off Removal Request	USER: Abbya.admin REQ DT: 2018-03-22 11:46; REQ TYP: c
Last Sign Off Removal Status	REQ STAT: Success
Remove Sign Off - P C or B	

In addition, the **Last Sign Off Removal Status** field will be updated with the request status of the last requested sign-off removal. The field will indicate the success of the removal, or the reason for the failure.

Last Sign Off Removal Request	USER Abbya.admin REQ DT: 2018-03-21 13:57; REQ TYP: B
Last Sign Off Removal Status	REQ STATUS: Employee not signed off for current pay period
Remove Sign Off - P C or B	

A successful sign-off removal will be recorded in **Audits** and will display the date and time of the request. The **User** column will contain verbiage to indicate that the sign-off was removed by the import process.

Category: Audits | Type of Edit: All | Current Pay Period | 1 Employee(s) Selected

WILSON, TONYA L | 1 of 1 | 133831 | Refresh | Go To

Date	Time	Type	Account	Pay Code	Amount	Work Rule	Override	Comment	Edit Date	Edit Time	User	Data Source
3/31/2018		Sign-off Removed							3/22/2018	9:45AM (GMT -06:...	Import:N-KRONOS...	Manager External ...

A report is available for the agency which contains all the sign-off removal requests by selected time frame. The name of the report is **Automated Sign-Off Removal** and is accessible from **Reports Manager**.

Automated Sign-Off Removal

Agency: 021

From Date: 03/01/2018 Through Date: 03/22/2018

Emp #	Emp Name	SO Removal Type	Requested By	Date Requested	Date Processed	Request Status

Extended Leave Cascade

FMLA extended leave cases can use leave in a specific order, based on the leave case type. FMLA cases use the cascade in the order listed below.

FMLA

Leave Case Type	eSTART Pay Code*	GHRS Pay Code
Adoption Foster Care	LV-Comp Time Taken	UCOMF
	LV-Personal Leave Taken	UPLDF
	LV-Excess Annual Leave Taken	UANNF
	LV-Annual Leave Taken	UANNF
	LV-Sick Leave Taken	USCKF/UYSSF
	LV-Excess Sick Leave Taken	USKEF
	LV-Leave Without Pay	ULWOF
Birth **Family - Serious Health Condition** **Military Caregiver** **Self - Serious Health Condition**	LV-Sick Leave Taken	USCKF/UYSSF
	LV-Excess Sick Leave Taken	USKEF
	LV-Comp Time Taken	UCOMF
	LV-Personal Leave Taken	UPLDF
	LV-Excess Annual Leave Taken	UANNF
	LV-Annual Leave Taken	UANNF
	LV-Leave Without Pay	ULWOF
Military Exigency	LV-Comp Time Taken	UCOMF
	LV-Personal Leave Taken	UPLDF
	LV-Excess Annual Leave Taken	UANNF
	LV-Annual Leave Taken	UANNF
	LV-Leave Without Pay	ULWOF

***** The pay code prefix may be FMLA instead of LV if submitted by the employee or entered by a manager. The GHRS pay code will remain the same.

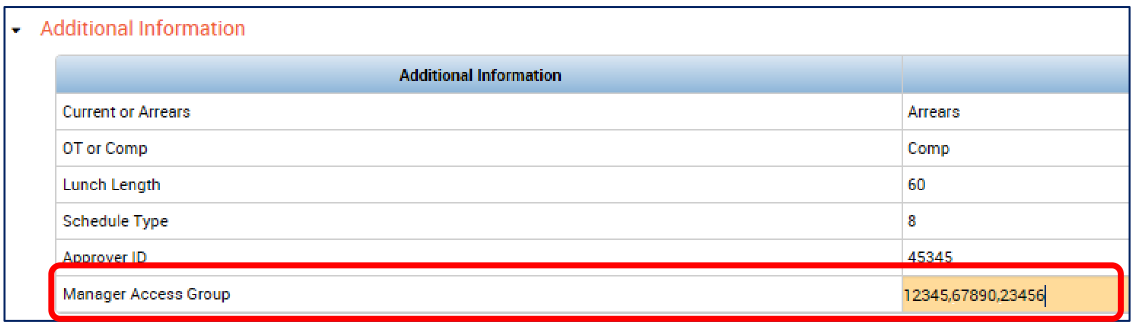
NOTE: Military, **Long Leave Without Pay** and **Educational** leave cases do not use a cascade. Refer to the **Other Types of Leave Cases** section of this guide for information on these types of cases.

Delegate Manager Setup (Permanent Delegation)

This process is used to grant a non-manager the permanent ability to complete managerial functions for specified manager(s). It should **only** be used for **permanent delegation**.

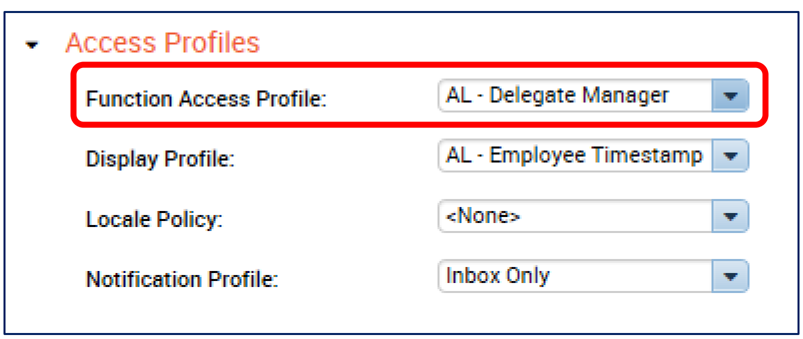
For **temporary delegation coverage**, such as leave time with a specific end date, the Manager Delegation process should be used. This is accessed from **Related Items>Temporary Delegation**. See the instructions in the section below for **Delegate Profile Setup (Temporary Delegation).**

1. From **Reconcile Timecard View** or **Related Items>Quickfind**, select the name of the person to be designated as the Delegate Manager. Choose **People>Edit** from the menu.
2. From **People Editor>Person** tab, select the **Additional Information** link.
3. In the **Manager Access Group** field, key the Employee ID number(s) of the manager(s) whose employees are being delegated.



NOTE: More than one ID may be keyed, but no more than 11 are allowed. The ID(s) should be keyed in the format below, with a comma separating each number and no spaces. For example: 12345,56789,90123.

4. Select the **Job Assignment** tab. Select the **Access Profiles** link. From the **Function Access Profile** drop-down choose **AL-Delegate Manager**. Select **Save**.



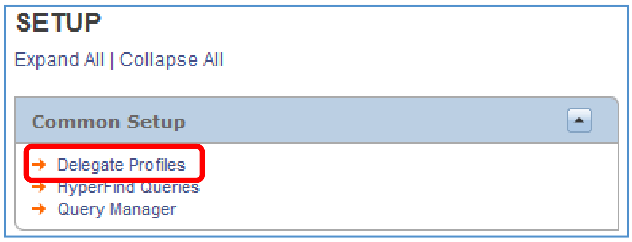
These changes will not become effective until the following business day.

Delegate Profile Setup (Temporary Delegation)

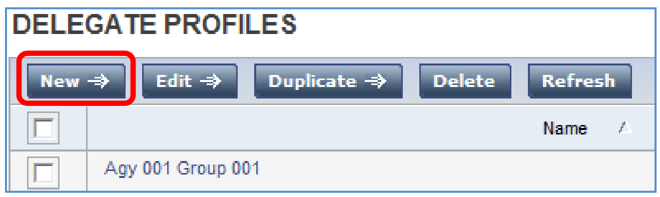
The Delegate Profile is used by managers to temporarily delegate their eSTART duties to another manager when away from the office. It contains a listing of other division managers to which duties can be delegated. Delegate profile setup is a two-step process.

Delegate Profile Setup (Step 1)

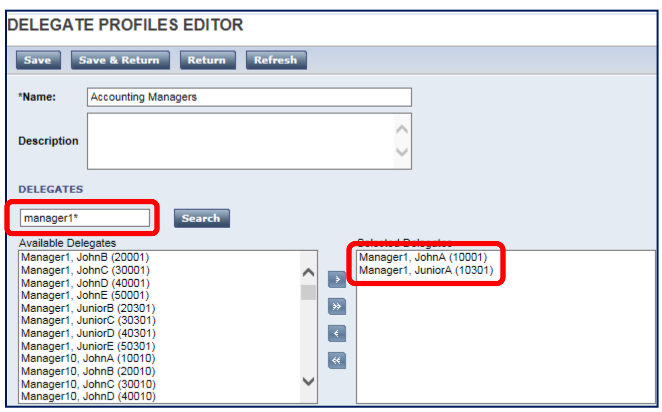
1. From the **Related Items** pane, select **Setup.** Then select **Delegate Profiles**.



2. Select **New** from the **Delegate Profiles** screen.



3. The screen below displays. Enter the name of the profile in the **Name** field.
4. Select the **Search** button to retrieve a list of managers. To narrow the search, enter a letter or letters of the last name in front of the asterisk (*), then select **Search**.



5. The **Available Delegates** display. Select the desired delegate(s), then use the right arrow button to move from **Available Delegates** to **Selected Delegates**.

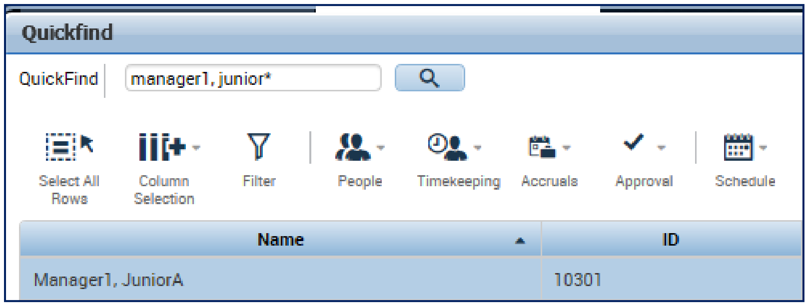
NOTE: To select more than one delegate, hold down the CTRL key and click on each name, then the right arrow button. Additionally, if a new manager is added, the agency administrator will need to manually add the new manager to the delegate profile.

6. Select the **Save** button.

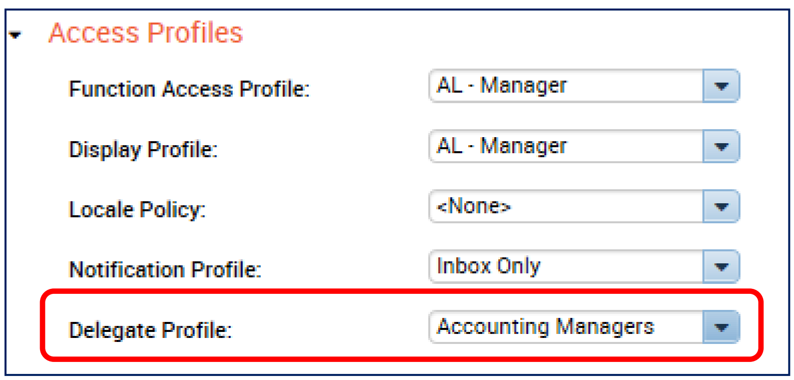
Assigning the Delegate Profile to the People Editor (Step 2)

The Delegate Profile must be assigned to the manager's People record.

1. From the Agency Administrator workspace, select **Related Items>Quickfind** or any of the employee views.



2. Locate manager(s) to be added to the delegate profile.
3. Highlight the manager name(s).
4. Select **People>Edit**.
5. Select **Job Assignment** tab.
6. Select **Access Profiles**.



7. Select the delegate profile name from the **Delegate Profile** drop-down.
8. Click **Save.**
9. Repeat for each manager.

The managers above may now use the **Temporary Delegation** feature when needed. Refer to the **Manager Delegation** job aid for assistance.

NOTE: A person cannot edit his/her own People Editor record. For those who need to be added to the new Delegate Profile, this step will need to be completed by another Agency Administrator.

NOTES: