Time and Leave
User's Guide for PI/GO/PD/Admin

Research Foundation of CUNY
Rev 3-21

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How to Access the Time and Leave System

All of the Research Foundation's e-Services are accessible through the Research Foundation website. Features, information, and services are made available based on the access level attached to a user's ID. To sign into the RF website, go to www.rfcuny.org . The User Sign In area is located to the left of the screen ❶, figure 1 on page 5.

Principle Investigator (PI)/Authorized Approver Access: Sign in using your 3 digit Web access I.D. and password.

Timekeeper Access: There are 2 ways a timekeeper may access the system,

1. Sign in using the Employee I.D. number and password. Select the timekeeper role when prompted.

2. Sign in using a pre-assigned web access 3 digit Timekeeper I.D. and password. (This is for timekeepers that are not encumbered to the particular project such as an administrator who is encumbered on another project funding the program).

Employee Access: Go to the Research Foundation Web site, www.rfcuny.org and sign in using your Employee I.D. number and password.

For questions regarding User ID and Log on matters, PI's /Authorized Approvers.
Please contact the Web Access Security Team at weblogonid@rfcuny.org or 212-417-8450**.**

Employees, please contact your Human Resources Payroll Coordinator at 212-417-8600.

Important: Do Not Share your User ID and Password with anyone.

After logging in hover over Electronic Tools ❷ scroll down to Time & Leave ❸ and select it. After clicking on the link, figure 2 on page 8 will appear.

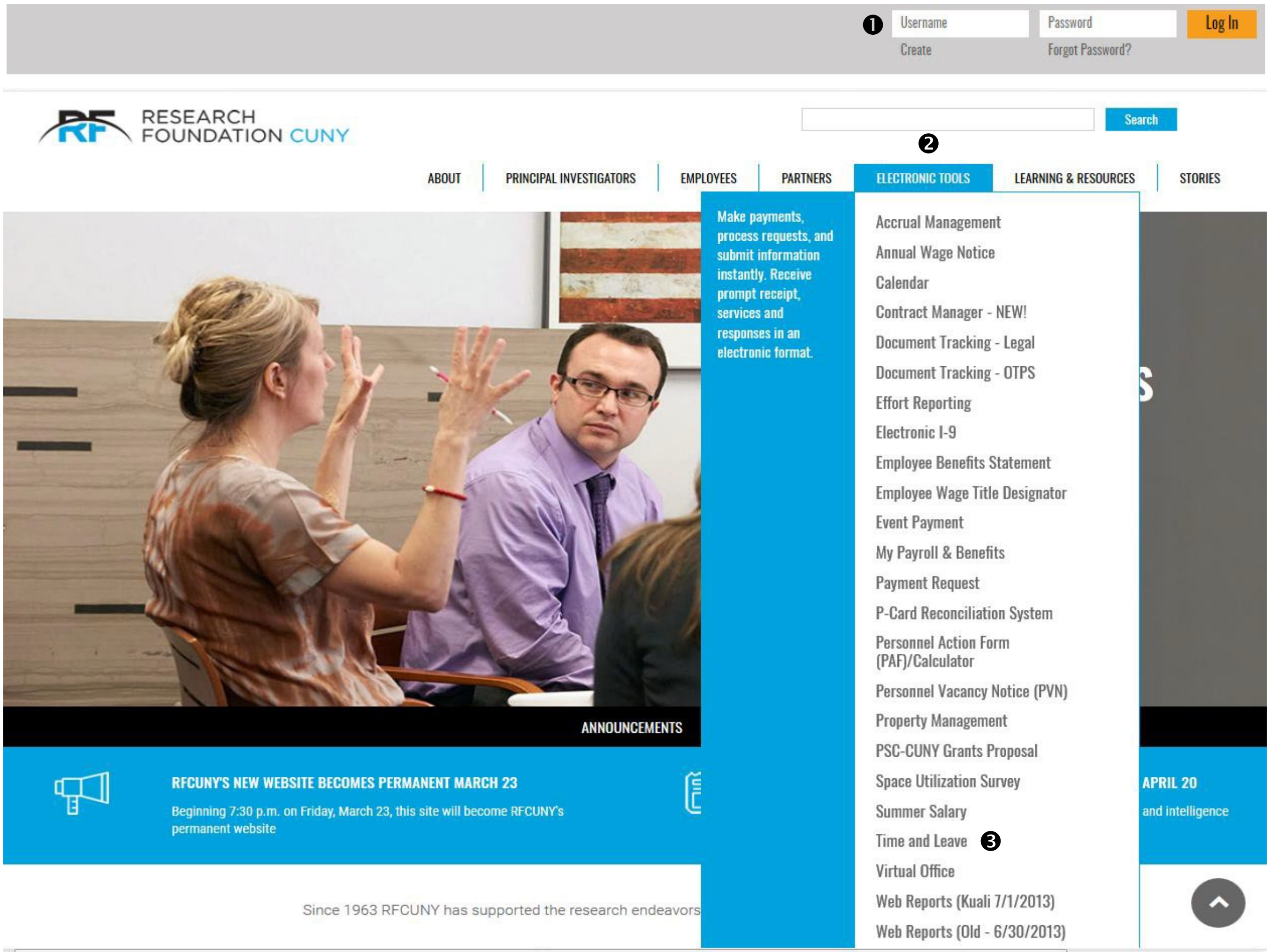


Figure 1

Timesheet Entry and Submission

The Research Foundation generates payroll for project employees biweekly in accordance with a published **payroll calendar**. Pay periods begin on a Monday and end on a Sunday. Timesheets are due on the Monday following the pay period's end date. The regular payday is the 2nd Wednesday following a pay period's end date. Occasionally, you will be notified that a payday is being designated a day early in order to accommodate a holiday schedule.

All employees are required to be paid in the regular payroll for the period in which they worked. It is the responsibility of the Project Director to ensure that all timesheets are completed and submitted to the Research Foundation no later than the pay period's timesheet due date(s).

Electronic entry of time and leave is limited to the current pay period and up to 4 retroactive pay periods. All pay periods which have already been paid or are prior to the 4 available retroactive ones, are for view only.

Submission of retroactive timesheets that are greater than four pay periods from a current pay period must be submitted on a **RF Paper Timesheet**, signed by the employee and the PI. In addition, a written justification for the delayed submission must be included on the paper timesheets.

Timesheet Submission Options

Each Principal Investigator will determine who will input and approve bi-weekly timesheets for the project(s). The three roles are:

1. **Employee,** employees should create their own timesheets and submit them for approval by a Timekeeper, Authorized Approver or PI. This access level *does not* have authority to submit timesheets to the RF.

2. **Please Note,** all employees that are paid through the Research Foundation for work done on a sponsored project have the ability at any time to create and/or view their timesheets and track their time and leave balances electronically through the Time and Leave program.

3. **Timekeeper,** a designated person assigned to enter timesheets for all or some employees on a project or to verify and edit timesheets previously **created** by employees. This access level **does not** have authority to submit timesheets to the RF.

The PI can use the Groups feature to designate a timekeeper from among the project's employees. In order to designate a person who is not encumbered on the project, the PI must contact the Web Access Security Team at weblogonid@rfcuny.org or 212-417-8450.

Please Note: Timekeeper access must be requested each time the project is renewed (when the project number's last 2 digits change [PPPPP SS YY].

Principal Investigator or Authorized Approver (PI/AA) – The project's PI and/or a designated person (Authorized Approver) assigned to approve timesheets and submit them to the RF for payroll processing. This access level may also enter timesheets for employees and/or verify and edit entries made by employees and/or timekeepers.

The project's PI automatically has access to the system. In order to designate another person as an Authorized Approver, the PI must contact the Web Access Security Team at weblogonid@rfcuny.org or 212-417-8450.

How to Navigate the Time and Leave System

This is the Time and Leave system cover page.

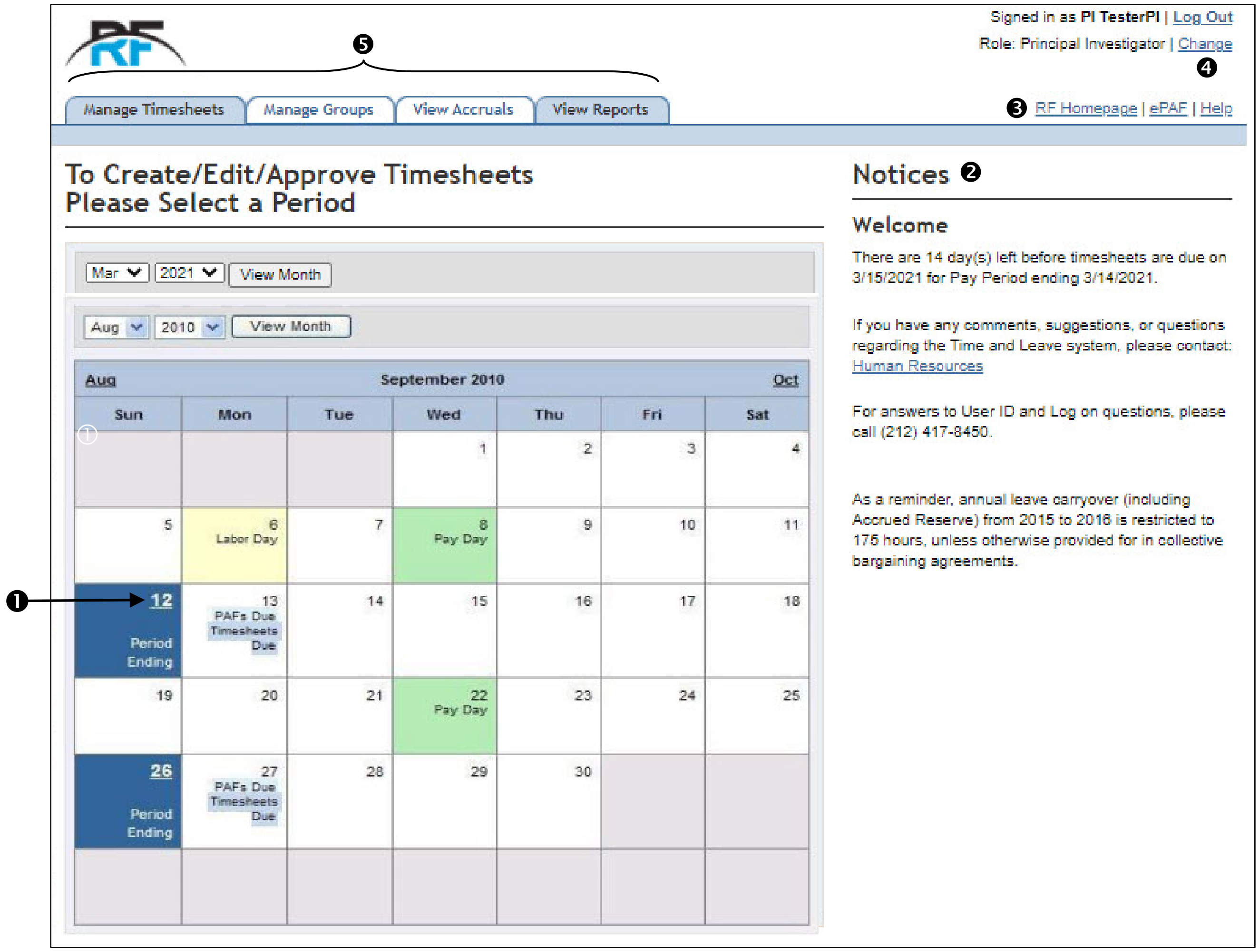


Figure 2

On the left is the payroll calendar. A blue highlighted day indicates a pay period end date where the user clicks ❶ to enter or view timesheets for the pay period. A green highlighted day indicates a pay day. A yellow highlighted day indicates an RF Holiday. To navigate from month to month, the user may click the preceding and following months at the top of the grid or change the month and year by using the date drop down menu located above the calendar grid.

On the right is a **Notices** ❷ area where the RF posts important information pertaining to payroll such as an early timesheet due date submission request.

A link to the **RF Homepage** ❸ and e-PAF system are located at the top right of the screen.

Also located at the top right is the **Change** ❹ link that allows a user to switch to another role such as from Timekeeper to Employee or Principal Investigator to Timekeeper (or vice versa).

Located at the top left of the screen are **Function Tabs** ❺ that allow the user to access different features of the Time and Leave system. These tabs will change depending upon the user access level. To view or enter a timesheet, select the corresponding pay period by clicking on the pay period end date.

The Employee Option

When a user accesses the Time and Leave System as an employee, the two tabs that are available are displayed at the top of the screen as separate tabs.

1. **Manage Timesheets (Default display)**
   This feature is where the employee selects a pay period and enters or views a timesheet.

2. **Time and Leave**
   This feature is where the employee can view his or her leave accrual balances and work schedule.

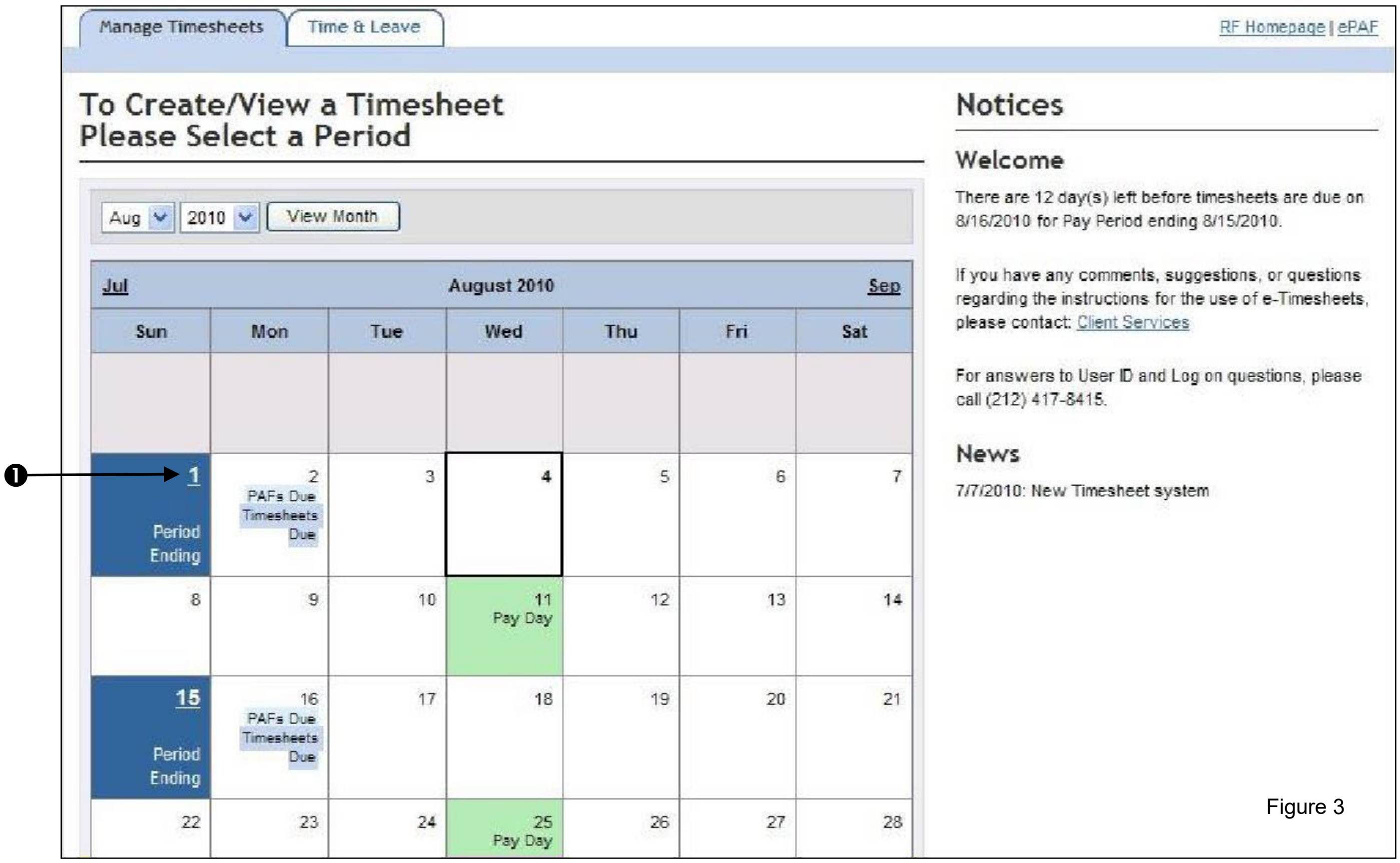


Figure 3

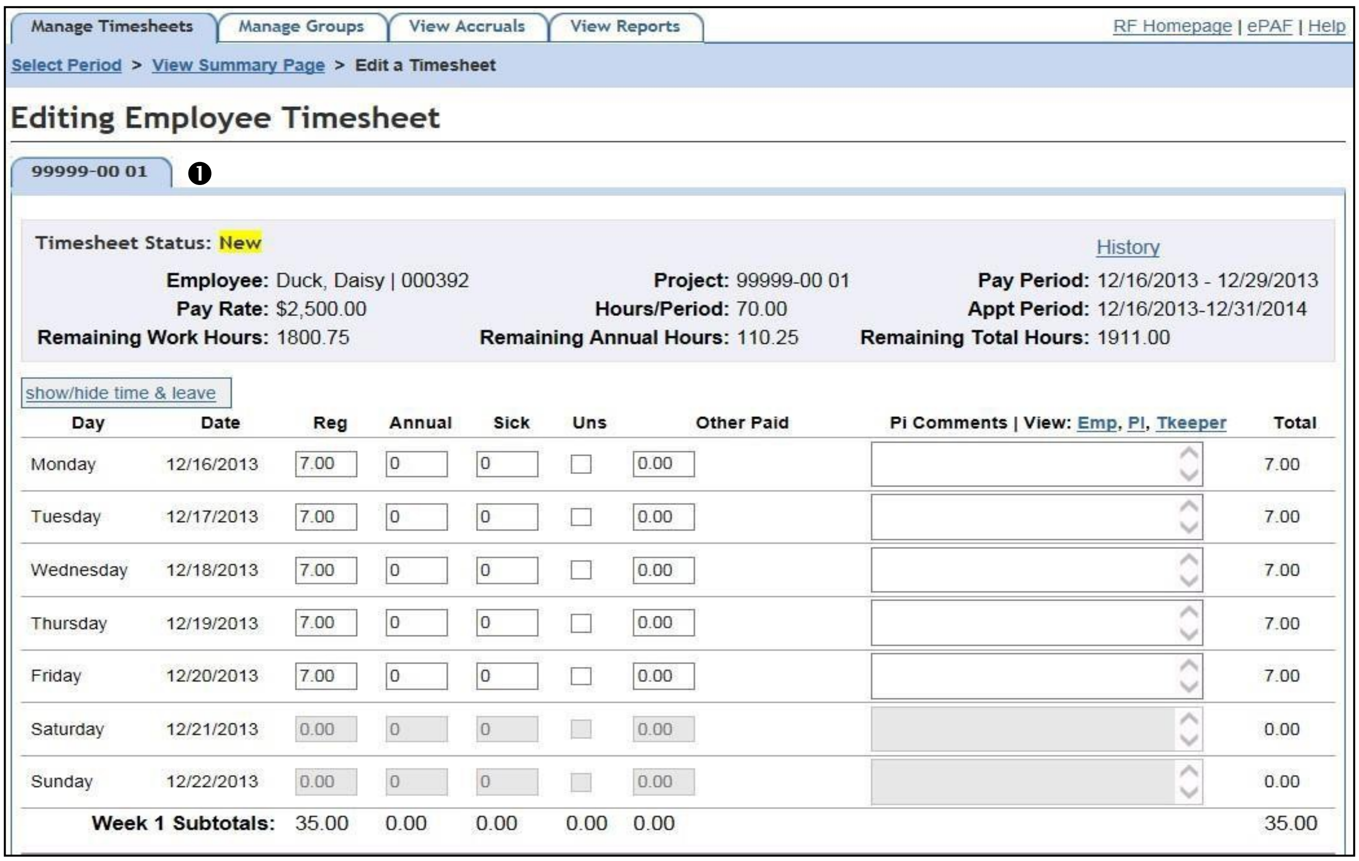
Manage Timesheets

Creating or Viewing Timesheets

The employee must choose the appropriate pay period. To select a pay period, click the pay **Period Ending ❶** date.

The current pay period and up to 4 retroactive pay periods will be available for entry. All previous pay periods which have already been paid are for view only. Submission of timesheets for periods prior to the 4 available *e*-retroactive pay periods must be submitted on a **Retroactive Payment Timesheet Form**, signed by the employee and PI.

This is the View/Edit Timesheet screen. Listed at the top is the **Projects Tab ❶** that the employee is currently appointed to and which cover the selected pay period. Each tab represents a separate timesheet.


Manage Timesheets | Manage Groups | View Accruals | View Reports — RF Homepage | ePAF | Help

Select Period > View Summary Page > Edit a Timesheet

Editing Employee Timesheet

99999-00 01 ❶

Timesheet Status: New — History

Employee: Duck, Daisy | 000392 — Project: 99999-00 01 — Pay Period: 12/16/2013 - 12/29/2013

Pay Rate: $2,500.00 — Hours/Period: 70.00 — Appt Period: 12/16/2013-12/31/2014

Remaining Work Hours: 1800.75 — Remaining Annual Hours: 110.25 — Remaining Total Hours: 1911.00

show/hide time & leave

Day	Date	Reg	Annual	Sick	Uns	Other Paid	Pi Comments | View: Emp, PI, Tkeeper	Total
Monday	12/16/2013	7.00	0	0		0.00		7.00
Tuesday	12/17/2013	7.00	0	0		0.00		7.00
Wednesday	12/18/2013	7.00	0	0		0.00		7.00
Thursday	12/19/2013	7.00	0	0		0.00		7.00
Friday	12/20/2013	7.00	0	0		0.00		7.00
Saturday	12/21/2013	0.00	0	0		0.00		0.00
Sunday	12/22/2013	0.00	0	0		0.00		0.00
	Week 1 Subtotals:	35.00	0.00	0.00	0.00	0.00		35.00

Figure 4

Understanding the Timesheet Header

The Timesheet Header displays the appointment information as per the submitted PAF.

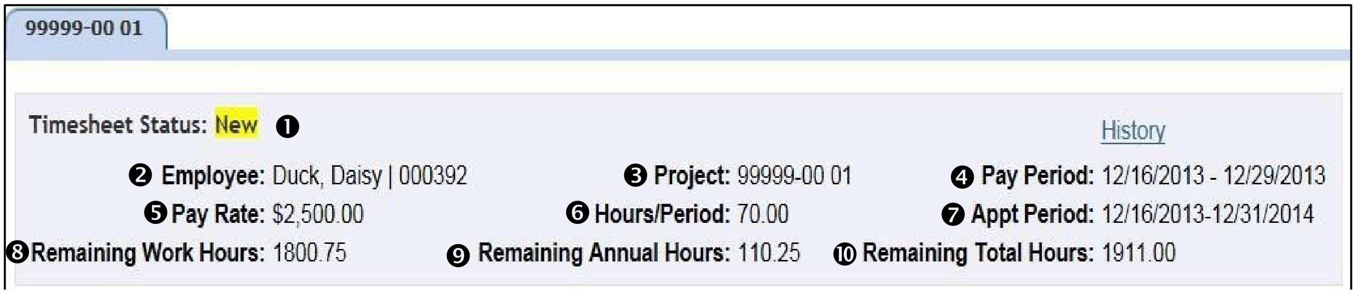


Figure 5

Timesheet Status ❶, this field will change to the following descriptions & color coded as the timesheet progresses through the payroll process.
There are 6 timesheet statuses:

1. **New:** This status indicates that the timesheet has not been generated and is ready for entry.
2. **Submitted**: This status indicates that the timesheet has been closed to entries by an employee or timekeeper. The PI or Authorized Approver may still edit the timesheet.
3. **Approved**: This status indicates that the PI or Authorized Approver has submitted the timesheet to the RF for processing. Further efforts by a PI / AA require the submission to be revoked and once edits have been made, re-approved. See the PI section of this manual for further instructions.
4. **Uploaded**: This status indicates that the timesheet has been processed and payroll has been generated by the RF.
5. **Manual**: This status indicates that a timesheet a been manually generated internally for a pay period in a specific appointment line.
6. **Created**: This status indicates that the timesheet has been generated & saved by an employee.

Employee ❷, this is the employee's Name and the Employee ID number. timekeeper and is available for further input at a later time.
Project ❸, this is the appointment's project number.
Pay Period ❹, This is the selected pay period.
Pay Rate ❺, this is the employee's pay rate, stated as an hourly wage or biweekly salary.
Hours/Period ❻, The number of hours the employee is expected to work each period based upon the PAF.
Appointment Period ❼, start and end dates of the appointment.
Remaining Work Hours ❽, the number of remaining work hours on the appointment (including regular, sick, unscheduled holidays and other hours).
Remaining Annual Hours ❾, the number of remaining annual hours on the appointment (including accrued hours and a projection of hours to be earned by the end of the appointment).
Remaining Total Hours ❿, the total hours remaining (on the specific appointment) since the last payroll.

Please Note: Employees must use the Remaining Annual Hours by the end of the appointment period indicated in the timesheet header. Three pay periods before the encumbrance end date, the e-Timesheet system will generate a pop-up message (figure 6 on page 12) indicating that work hours are soon coming to an end and advises the employee to schedule annual leave. Click ok to continue.

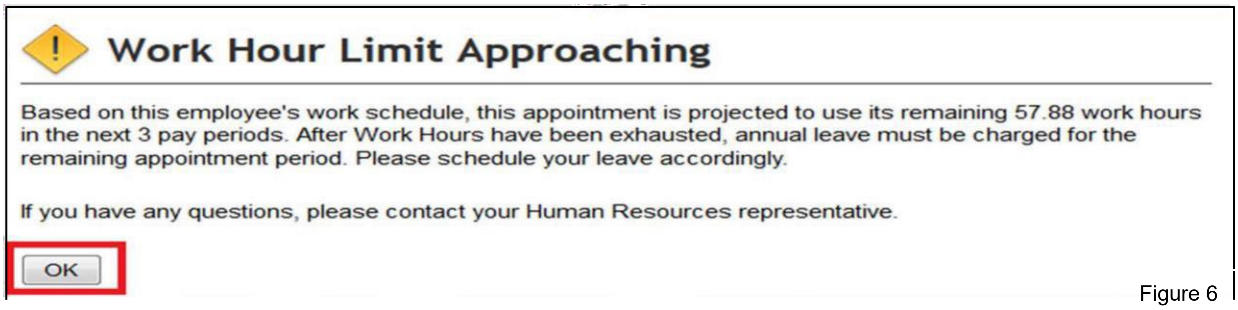
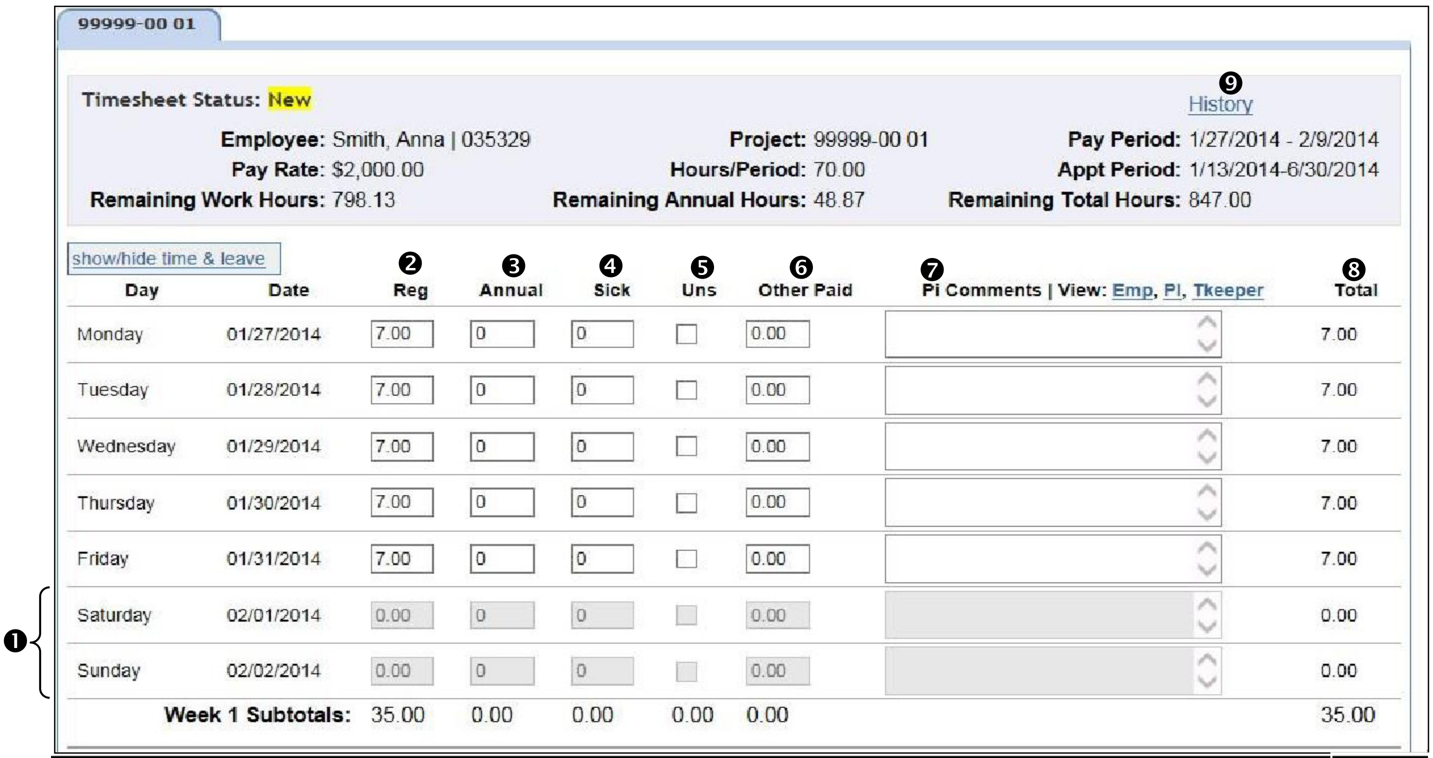


Figure 6

Editing the Timesheet

The timesheet body is pre-populated according to the scheduled entered in the E-PAF system or changed in the Time and Leave system.



Day	Date	❷ Reg	❸ Annual	❹ Sick	❺ Uns	❻ Other Paid	❼ PI Comments | View: Emp, PI, Tkeeper	❽ Total
Monday	01/27/2014	7.00	0	0		0.00		7.00
Tuesday	01/28/2014	7.00	0	0		0.00		7.00
Wednesday	01/29/2014	7.00	0	0		0.00		7.00
Thursday	01/30/2014	7.00	0	0		0.00		7.00
Friday	01/31/2014	7.00	0	0		0.00		7.00
Saturday	02/01/2014	0.00	0	0		0.00		0.00
Sunday	02/02/2014	0.00	0	0		0.00		0.00
	Week 1 Subtotals:	35.00	0.00	0.00	0.00	0.00		35.00

Figure 7

Each row, reading from left to right, is one day. Days that are outside of the appointment period will appear blank and are closed for entry ❶. RF Holidays are highlighted in yellow.

Each column represents a charge type. They are:

- **Reg** (**Regular**) ❷, time actually worked by the employee on that day.
- **Annual** ❸, hours charged by the employee for time off as annual leave.
- **Sick** ❹**,** hours charged by the employee for time off as sick leave. Sick leave may be used for the employee's own care and up to 56 hours may be used for the care of a qualifying family member (Parent, Child, Spouse, Domestic partner, Sibling (including a half, adopted, or step sibling), Grandchild, Grandparent, Child or parent of an employee's spouse or domestic partner). Any other individual related by blood or whose close association with the employee is the equivalent of a family relationship.

- **Uns (Unscheduled Holiday) ❺,** for full time employees only - This type of leave requires that time be taken in a whole day block. The amount of hours charged is determined by the employee's pre-defined schedule for that day. For part time employees, this box will be grayed out and unavailable for entry.
- **Other Paid ❻,** hours charged for other miscellaneous reasons. They are: Mandatory Court Attendance, Death in Family, Health Department Order, Holiday pay, Jury Duty, and Other Authorized time off.
- **PI Comments ❼,** are made in this section that can be viewed by Employee, PI and Timekeeper. Charging Other Authorized requires a comment.
- **Total ❽,** are the number of hours worked each day and totaled at the bottom of the column where it states 35 hours.
- **History ❾,** will allow you to view the audit trail for this timesheet.

  Please Note: Eligibility for these types of miscellaneous leaves is limited to and dependent upon the employee's status (FT, PT A, PT B, etc.) and FLSA classification.

Important

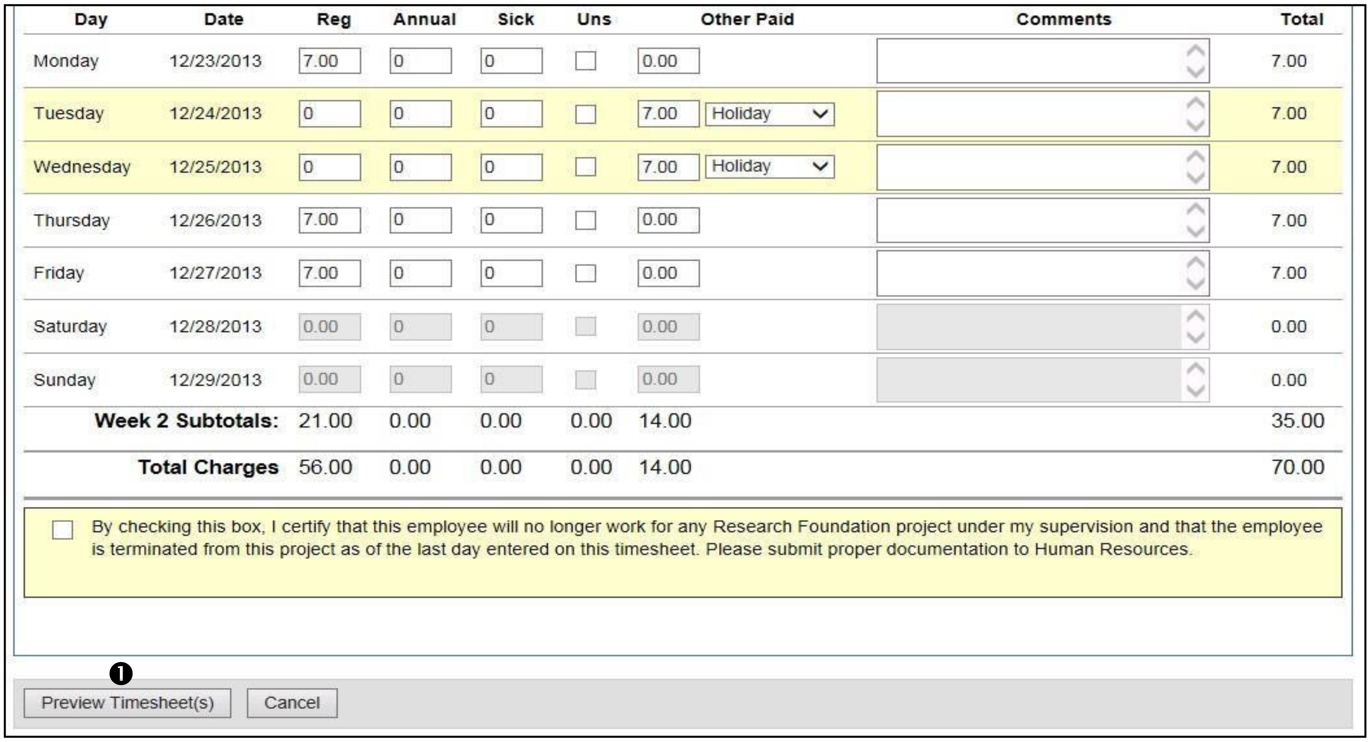
The pre-defined weekly schedule set up by the PI in the PAF (or changed by the PI/AA in the Time & Leave system) will automatically populate each timesheet in the Regular column.

- **Non-Exempt** employees with a predefined schedule could make changes to the pre-populated hours if the actual hours worked differ. The employee will enter the corrected charges in the appropriate column on each day of the week worked. Employees should input a comment in the box to the right for the timekeeper or PI/AA as to why they have made changes to the predefined schedule. If an employee worked on a holiday, there must be a comment in the comment box.
- **Non-Exempt** employees will be paid for all hours charged, regardless of the predefined schedule. Hours actually worked (charged in the Regular column) in excess of 40 hours in any week will be paid at 1.5 times the regular rate of pay.
- **Exempt** employees whose days worked differ from their pre-defined schedule must ask their PI or AA to amend the schedule before correcting entries can be accepted by the system.
- **Exempt** employees who charge fewer or more hours (Regular, Annual, Annual Leave Reserve, Sick, Unscheduled Holiday, or Other Paid) than what is in the pre-defined schedule will be paid only for the scheduled hours for that day.
- **Exempt** employees who do not charge any time at all (including any applicable leave accruals) on any scheduled day **will not be paid** for that day at all.

The employee enters or edits the time (if different from the pre-populated entries) and any applicable comments by clicking on the corresponding field next to the day.

Please Note: An employee will not be able to submit a timesheet charging more regular hours than the Remaining Work Hours on the Timesheet Header. At the time the employee exhausts the Remaining Work Hours, the **Regular** column on the timesheet will not permit entry (grey-out). The employee should have taken time off as annual leave and should charge annual leave.

Once the employee has finished entering the timesheet, he or she clicks on the Preview Timesheet(s) ❶ button at the bottom left of the page to proceed.



Day	Date	Reg	Annual	Sick	Uns	Other Paid		Comments	Total
Monday	12/23/2013	7.00	0	0		0.00			7.00
Tuesday	12/24/2013	0	0	0		7.00	Holiday		7.00
Wednesday	12/25/2013	0	0	0		7.00	Holiday		7.00
Thursday	12/26/2013	7.00	0	0		0.00			7.00
Friday	12/27/2013	7.00	0	0		0.00			7.00
Saturday	12/28/2013	0.00	0	0		0.00			0.00
Sunday	12/29/2013	0.00	0	0		0.00			0.00
Week 2 Subtotals:		21.00	0.00	0.00	0.00	14.00			35.00
Total Charges		56.00	0.00	0.00	0.00	14.00			70.00

By checking this box, I certify that this employee will no longer work for any Research Foundation project under my supervision and that the employee is terminated from this project as of the last day entered on this timesheet. Please submit proper documentation to Human Resources.

❶

Preview Timesheet(s) Cancel

Figure 8

After clicking the ‘Preview Timesheet(s)’ button, the system will generate a review screen, figure 9.

Day	Date	Reg	Annual	Sick	Uns	Other Paid	Comments	Total
	Week 1 Subtotals:	35.00	0.00	0.00	0.00	0.00		35.00
Monday	12/23/2013	7.00	0	0		0.00		❶ 7.00
Tuesday	12/24/2013	0	0	0		7.00		7.00
Wednesday	12/25/2013	0	0	0		7.00		7.00
Thursday	12/26/2013	7.00	0	0		0.00		7.00
Friday	12/27/2013	7.00	0	0		0.00		7.00
Saturday	12/28/2013	0.00	0	0		0.00		0.00
Sunday	12/29/2013	0.00	0	0		0.00		0.00
	Week 2 Subtotals:	21.00	0.00	0.00	0.00	14.00		35.00
	Total Charges	56.00	0.00	0.00	0.00	14.00		70.00

By checking this box, I certify that this employee will no longer work for any Research Foundation project under my supervision and that the employee is terminated from this project as of the last day entered on this timesheet. Please submit proper documentation to Human Resources.

Save | Save & Approve | Edit | Void Only This Timesheet

Figure 9

The **Total** column ❶ that denotes the total hours entered for the day. At the end of each week there is a weekly subtotal and at the end of the 2 week pay period is a grand total for the timesheet. If the employee is appointed to more than one appointment, and therefore completes a timesheet for each appointment, these totals take into account hours from all timesheets for the period. The employee may choose to preview each timesheet separately by clicking on the **Preview Only This Timesheet** button which is located next to the **Void Only This Timesheet** button when required. The totals will then only correspond to the one timesheet on display. When a user clicks either of the **Preview** button (figure 8, page 14), the timesheet is displayed for review.

Error messages, if any, will display at the top of the screen. An error message prevents the timesheet from being submitted. Errors can occur when an employee exceeds the remaining work hours or when the encumbrance remaining is not sufficient to cover for the timesheet charges. Error messages are in red.

Warning messages, if any, will display in the status box at the top and bottom of the screen. If the employee notes, at any time during the timesheet process, that time or encumbrance are nearing an end earlier than expected, s/he should immediately notify the PI/AA. Warning messages are in yellow.

If the employee agrees with the information in the timesheet, s/he clicks either the **Save** ❷ or **Save & Submit** button ❸ in figure 9A on page 16 to conclude the process. This will move the timesheet status to Created.

While the **Preview** functionality allowed the user to view all timesheet totals as one, each timesheet must be saved and submitted individually. Clicking the save button allows the employee to make edits and additional entries to a timesheet at a later time.

Clicking the Save and Submit button prevents an employee from making any further changes. This will move the timesheet status to submitted. If changes need to be made after the timesheet is submitted, the employee must contact the PI or AA.

If the employee does not agree with the displayed information, s/he can click **Edit ❹** to change the information. In order to completely cancel a timesheet, click the **Void Only This Timesheet ❺**button.

Once a timesheet is submitted, the employee may log off or click the Time and Leave tab at the top of the page.

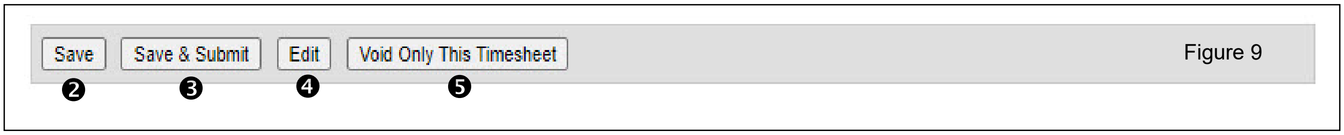


Figure 9

Accrual Balance and Work Schedule

Employees Accrual Balances and Work Schedule are in separate sub tabs under the Time & Leave main tab in figure 10.

Time & Leave Accrual Screen

The screen below shows the Employee Profile and the Time and Leave Accrual balances in figure 10.

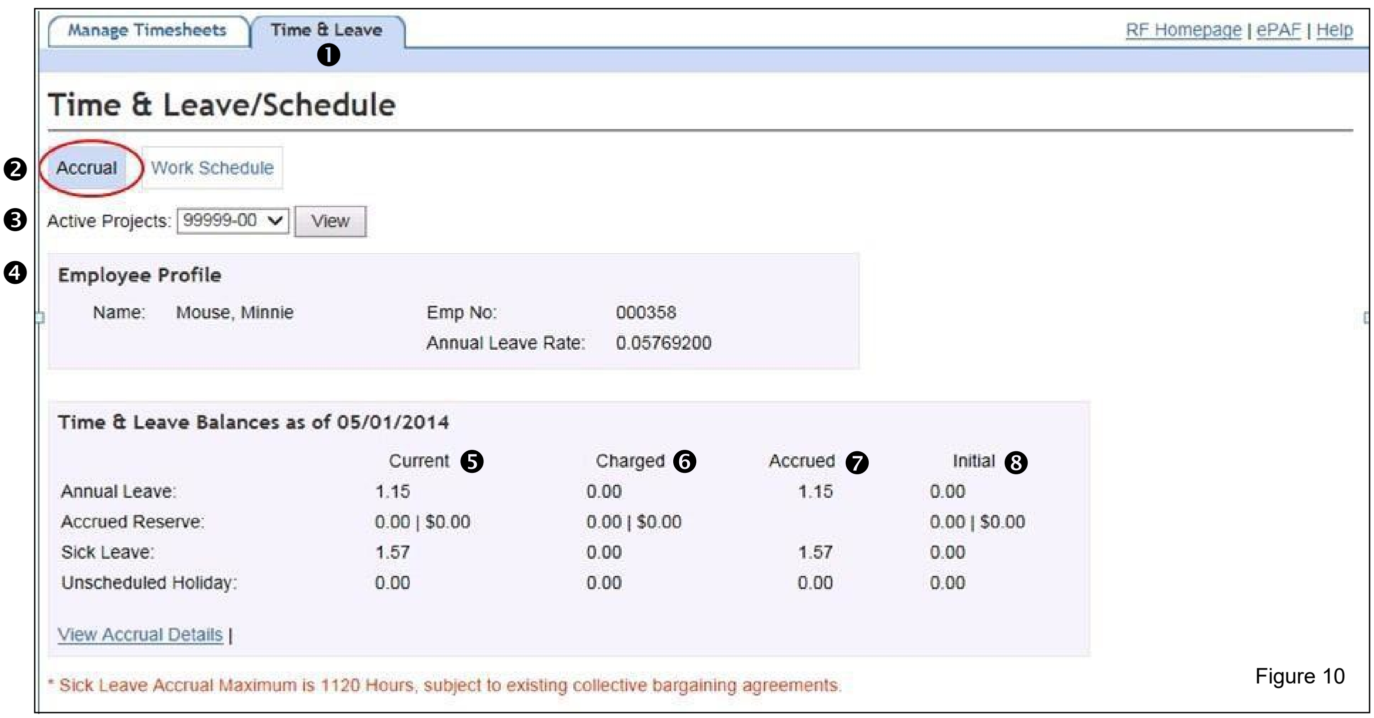


Figure 10

To view the employee's Accrual, click the **Time and Leave ❶** tab then click on the **Accrual ❷** sub tab. An employee can choose which of their appointments to view by selecting a project from the drop-down list of **Active Projects ❸**. **Employee Profile ❹** displays the Name, Emp No. and Annual Leave rate. The Accrual tab will display the employee's Accrual information. The Accrual tab displays the employee's **Current ❺**, **Charged ❻**, **Accrued ❼**, and the **Initial ❽** balances for: Annual Leave, Accrued Reserve, Sick Leave and Unscheduled Holiday.

Accrued Reserve will never have an amount under the Accrued column, because employees cannot accrue on time charged to Accrued Reserve.

Accruals are earned based upon the number of hours submitted in a timesheet for a specific project. Please see the **RF Time Off and Leave policy 506** for more information.

Under the Charged ❺ column in figure 10 on page 16, the employee can click on the hours which are underlined to see more information about the used accruals such as when and in which pay period the time was used.

Work Schedule

The screen in figure 11 shows the Employee Profile and Work Schedule.

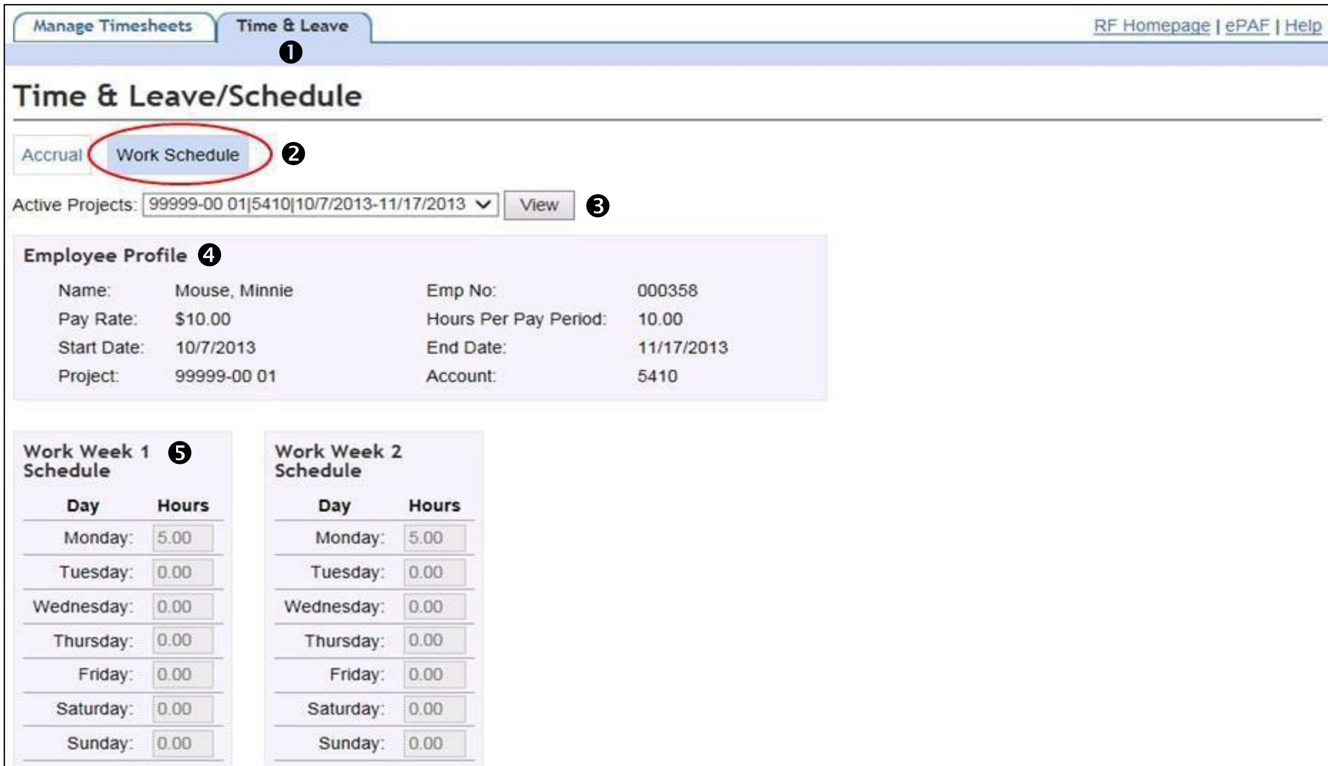


Figure 11

To view the employee's Work Schedule, click the **Time and Leave** ❶ tab at then click on the **Work Schedule** ❷ tab. An employee can choose which of their appointments to view by selecting a project from the drop-down list of **Active Projects** ❸. **Employee Profile** ❹ displays the Name, Emp No., Pay rate, Hours Per Pay Period, Start Date, End Date, Project number and Account number. Clicking the Work Schedule tab will display the employee's **Work Week Schedule** ❺ profile which includes the appointment's information and predefined work schedule.

The schedule area displays the employee's pre-defined schedule as inputted by the employee's Project Director or Principal Investigator in the E-PAF system or changed in the Time and Leave system. Each week is listed separately.

The Timekeeper Option

A Timekeeper is a PI designated person assigned to enter timesheets or to verify and edit ones previously created (by employees or themselves) for all or some employees on a project.

Timesheets submitted by employees can be viewed but not edited. Once submitted, a timesheet may only be edited by the PI/AA.

The timekeeper access level **does not** have authority to submit timesheets to the RF.

Please Note: Timekeeper access must be granted for each project and each time the project is renewed (when the project number's last 2 digits change PPPPP SS YY).

To access the Time and Leave System, Timekeeper's must access the RF Website via their Employee ID number and password and when prompted, choose Timekeeper as the role.

The PI can use the Groups feature (See description in The PI/Authorized Approver Option on page 38) to designate a timekeeper from among the project's employees. In order to designate a person who is not encumbered on the project, the PI must contact the Web Access Security Team at weblogonid@rfcuny.org or 212-417-8450. This person must access the website using the assigned 3 digit code and accompanying password received by email from the Web Access Security Team.

When a user accesses the Time and Leave System as a Timekeeper, the features that are available are displayed at the top of the screen as separate tabs. They are,

Manage Timesheets (Default display) ❶, This feature is where the timekeeper selects a pay period and enters or views a timesheet.
View Accruals ❷, This feature allows the timekeeper to view the leave accrual balances for all employees assigned to him or her.
View Reports ❸, This is where the Timekeeper can view timesheet reports for a selected period and view the PRSY's annual leave liability report.

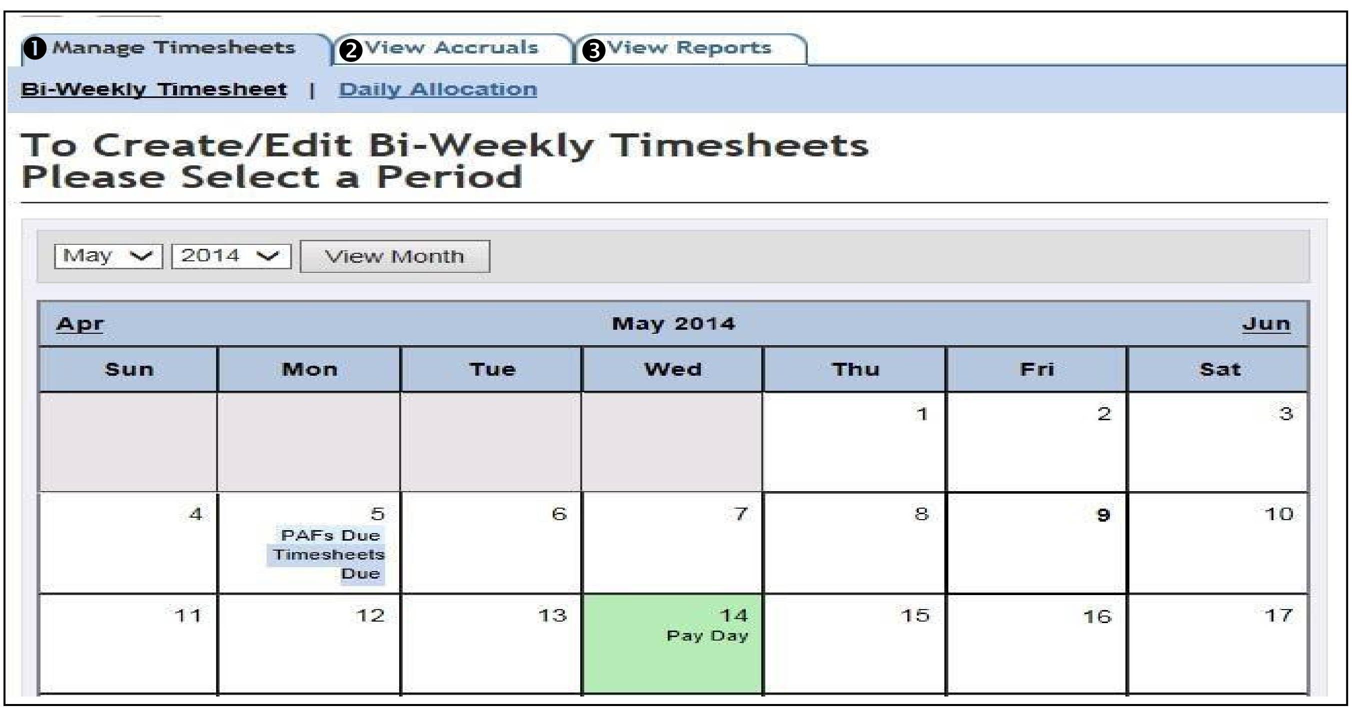


Figure 12

Manage Timesheets

Timekeepers have 2 methods of timesheet management:

1. **Biweekly Timesheet ❶,** this method is used to enter and submit the timesheet for the entire pay period.

2. **Daily Allocation ❷,** this method is used to enter and *save* entries for a particular day of the timesheet.

To select an entry method, click on one of the two links.

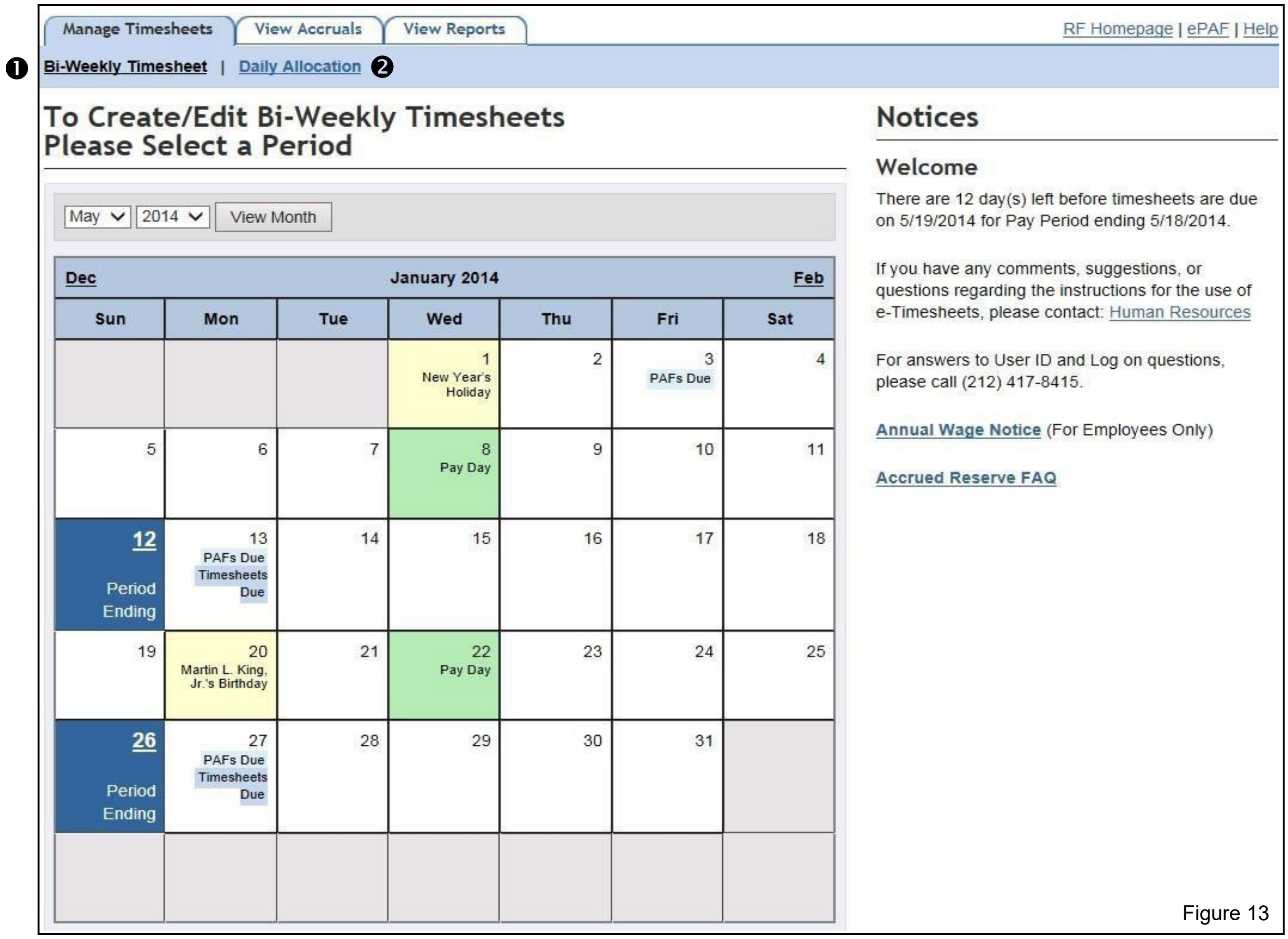


Figure 13

Biweekly Timesheet Method

To create or view timesheets, the Timekeeper must choose the appropriate pay period. The current pay period and up to 4 retroactive pay periods will be available for entry. All previous pay periods which have already been paid are for view only. Submission of timesheets for periods prior to the 4 available *e*-retroactive pay periods must be submitted via an RF paper timesheet, signed by the employee and PI.

To select a pay period, click the pay **Period Ending** ❶ date.

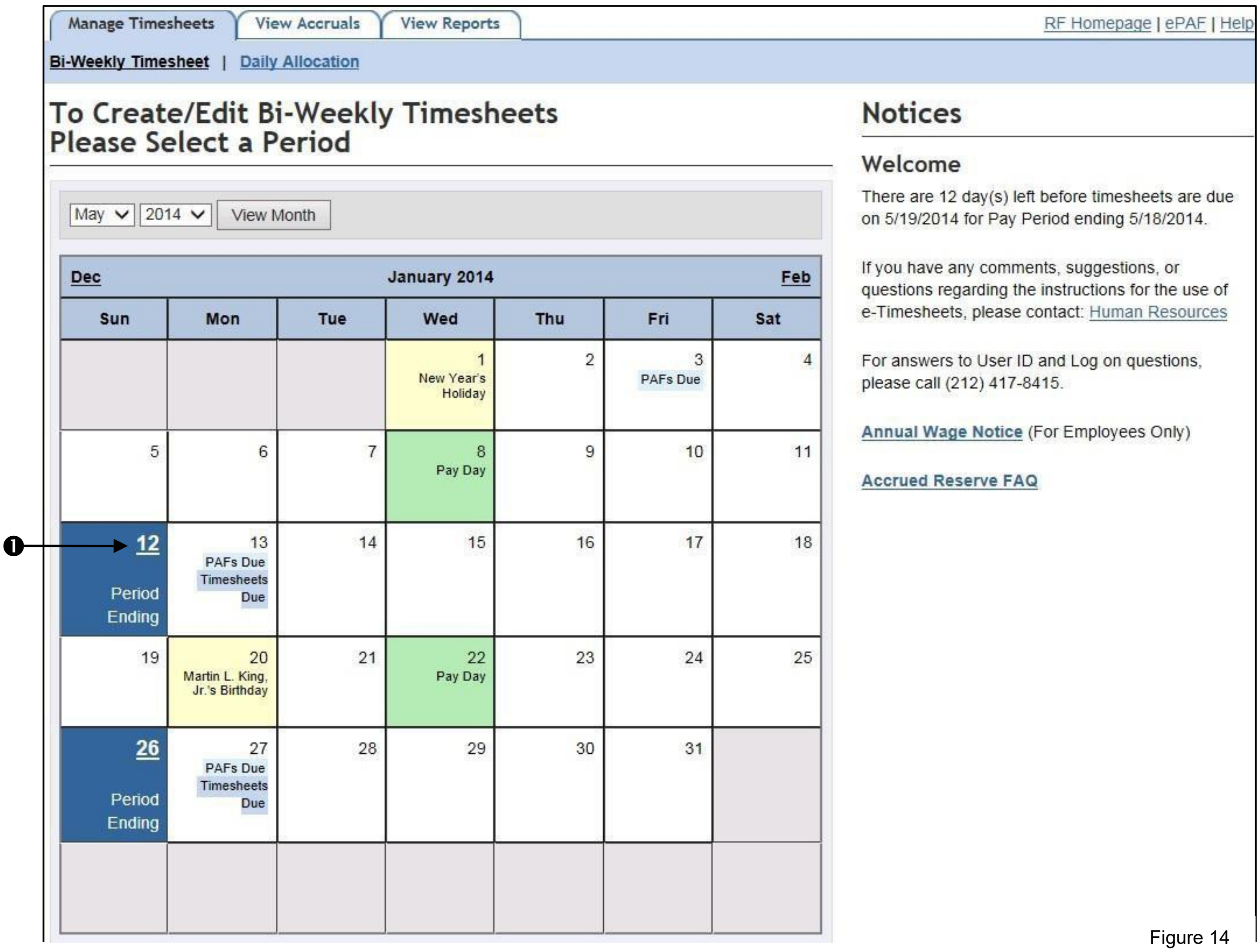


Figure 14

Next, the Timekeeper selects a **Group** ❶ from the drop-down menu for which entries are desired and clicks **Continue** ❷ to proceed in figure 15.

A group is a set of employees from a particular project that has been assigned by the PI to a timekeeper. This allows the PI to name several timekeepers, each for a specific set of employees.

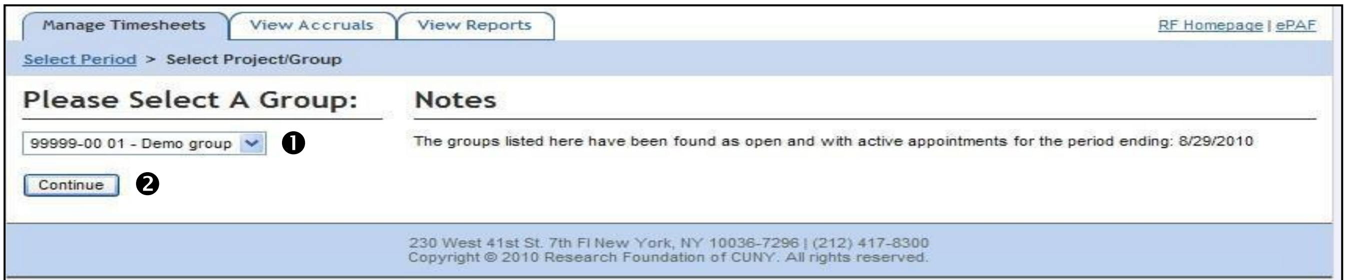


Figure 15

This is the Employee Timesheet Summary page in figure 16. The employees in the selected group are listed alphabetically. At the top of the page is the **Timekeeper Group** number ❶, Group description and selected pay period dates.

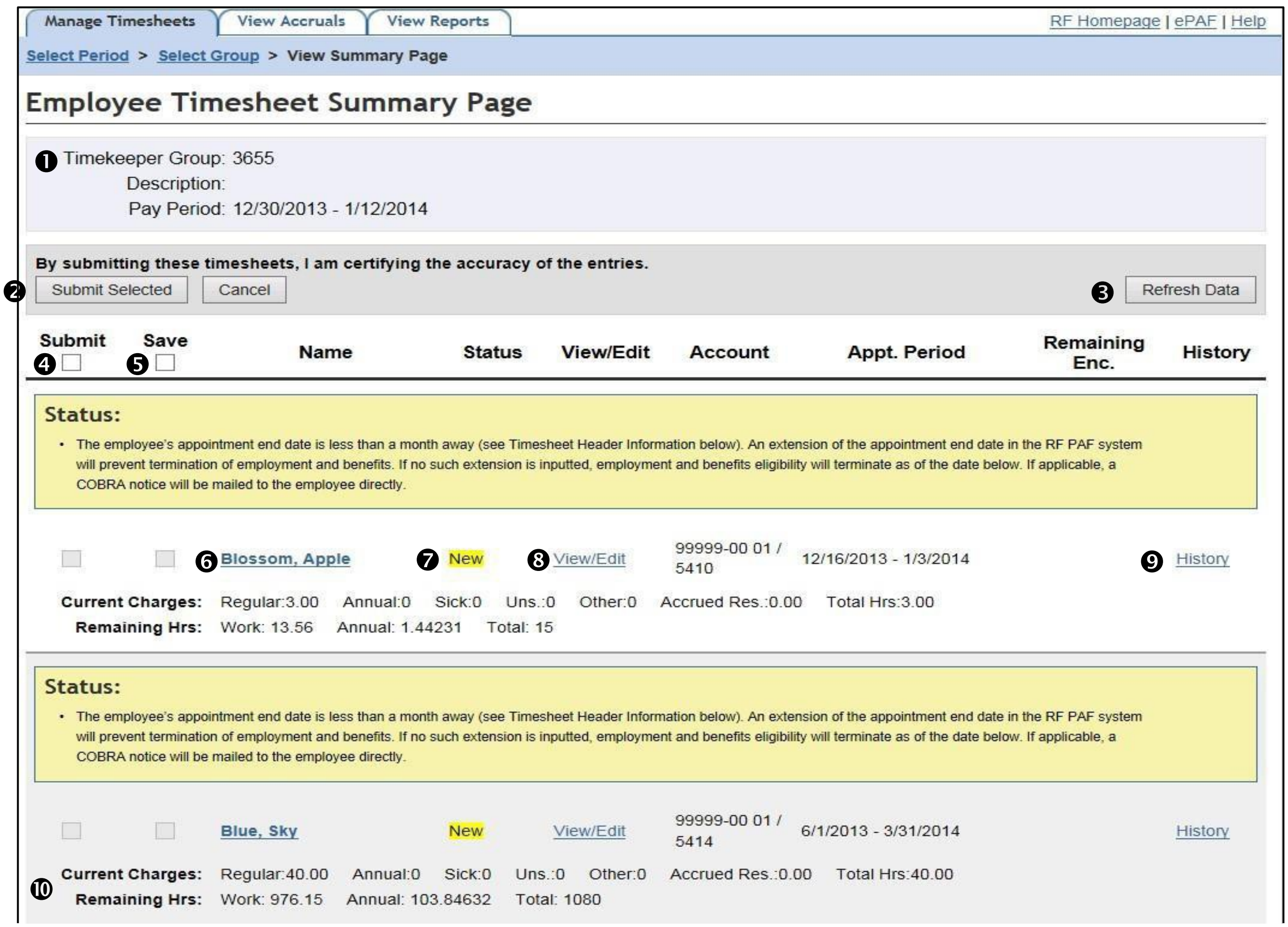


Figure 16

Reading across each employee section from left to right, the following information regarding the employee's appointment and timesheet that is pre-populated based on the pre-defined schedule from the PAF is displayed in figure 16 on page 21.

Submit Selected/Cancel ❷, by checking the box, it allows you mass approve timesheets. The RF highly recommends that you do not do this. Review each timesheet. You do not want to inadvertently over-pay an employee.
Refresh Data ❸, this will automatically refresh the summary page. This should be used after you have approved an employee's timesheet. If an employee has made any changes, by refreshing the page, the system will update the information in case there are any edits that need to be made.
Submit ❹, by clicking on the box, it will allow you to approve a timesheet without reviewing it. The RF recommends that this not done without you reviewing each timesheet separately.
Save ❺, allows you to save the timesheet for future submission or edits.
Employee Name ❻, by clicking on the Employee's name, it will allow you to view the employee's profile page where detailed information regarding the employee's appointment, the employee's pre-defined schedule, and accruals can be found.
Timesheet Status ❼, this field will change to the following descriptions & colored as the timesheet progresses through the payroll process.
There are 6 timesheet statuses:

1. **New**: This status indicates that the timesheet has not been generated and is ready for entry.
2. **Submitted**: This status indicates that the timesheet has been closed to entries by an employee or timekeeper. The PI or Authorized Approver may still edit the timesheet.
3. **Approved**: This status indicates that the PI or Authorized Approver has submitted the timesheet to the RF for processing. Further efforts by a PI / AA require the submission to be revoked and once edits have been made, re-approved. See the PI section of this manual for further instructions.
4. **Uploaded**: This status indicates that the timesheet has been processed and payroll has been generated by the RF.
5. **Manual**: This status indicates that a timesheet a been manually generated internally for a pay period in a specific appointment line.
6. **Created**: This status indicates that the timesheet has been generated & saved by an employee.

View/Edit ❽, clicking on this field allows access to the actual timesheet.
Start-End Dates ❾, The appointment's start and end dates.
History ❿, you can view the audit trail for this timesheet.
The last two rows consist of the employees **Current Charges** and **Remaining Hours ❿**.
Current Charges displays the number of hours charged on the timesheet. **Regular:** The number of hours inputted in the 'Regular column of the timesheet that reflects actual hours worked. For timesheets with a status of New, the Regular hours will be pre-populated with the PAF's pre-defined schedule.
Annual: The number of hours inputted in the Annual column of the timesheet. **Sick:** The number of hours inputted in the Sick column of the timesheet. **Uns:** The number of hours inputted in the Unscheduled Holiday column of the timesheet. **Other:** The number of hours inputted in the other column of the timesheet.
Accrued Res: The number of accrued reserve hours charged on the timesheet. **Total Hrs:** The overall number of hours to be paid for the entire timesheet.

Remaining hours: The total hours remaining (on the specific appointment) since the last payroll.
Work: Remaining work hours on the appointment. **Annual:** Remaining annual hours on the appointment.
Total: The total hours remaining on the appointment.

Please Note: These numbers do not represent any retroactive pay period timesheets (paper or electronic) that are pending for the payroll.

To enter or view a timesheet, click on **View/Edit ❽** in figure 16 on page 21.

To return to the main pay period calendar selection page, click on the select period link at the top of the page right under **Manage Timesheets** ❶.

To select a different Group, click **Select Group** ❷ link at the top of the page right under Manage Timesheets.

Viewing/Editing a Timesheet

This is the View/Edit Timesheet screen. Listed at the top, as tabs, are all the appointments that the employee is currently appointed to for the selected project and which cover the selected pay period. Each tab represents a separate timesheet.

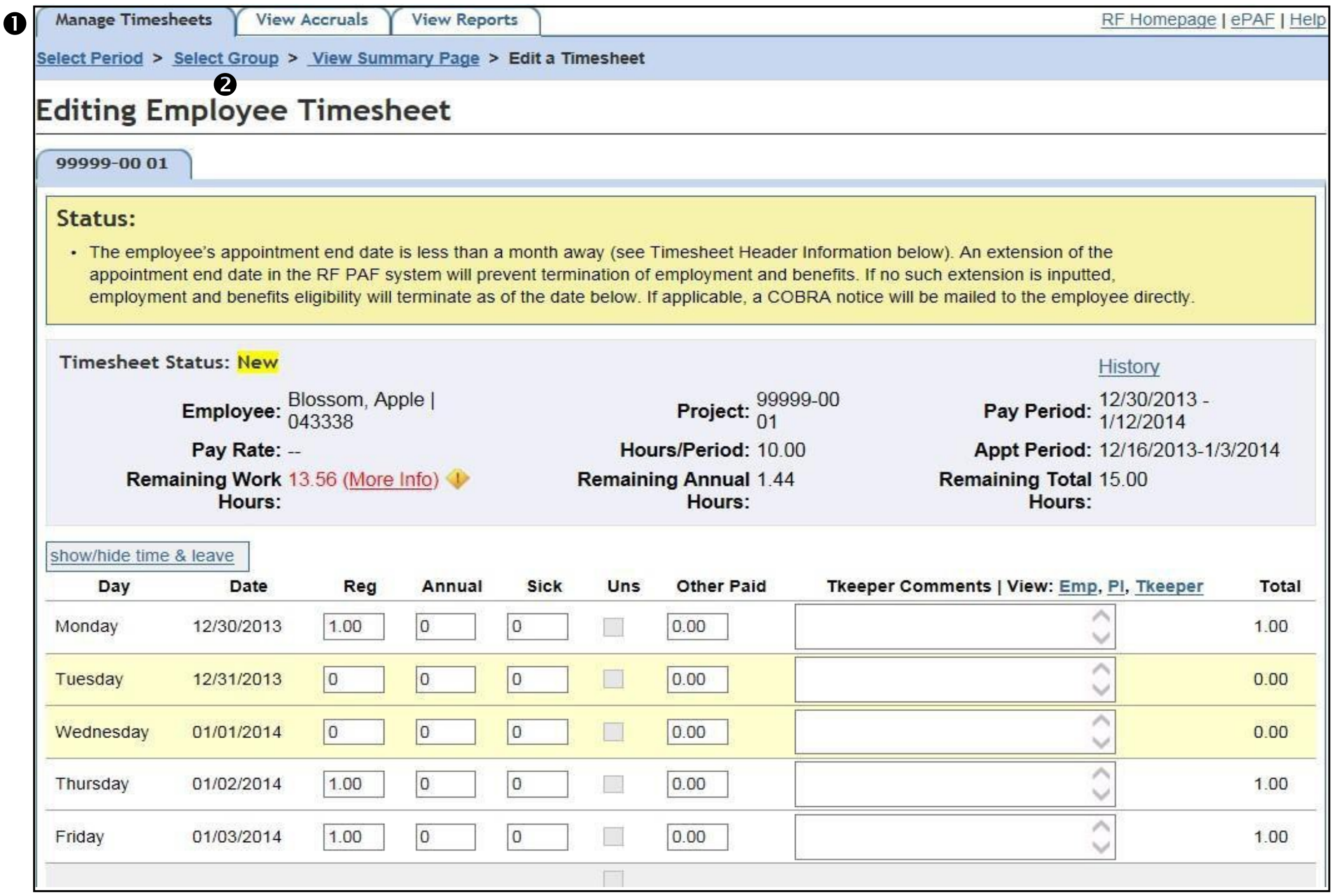


Figure 17

Beginning at the top left and reading across is the Timesheet Header Information section which displays information from the employee's PAF for this appointment.
(for full numbered details see figure 7 on page 12)

Timesheet Status, this field will change to the following descriptions & colors as the timesheet progresses through the payroll process.
There are 6 timesheet statuses:

1. **New:** This status indicates that the timesheet has not been generated and is ready for entry.
2. **Submitted**: This status indicates that the timesheet has been closed to entries by an employee or timekeeper. The PI or Authorized Approver may still edit the timesheet.
3. **Approved**: This status indicates that the PI or Authorized Approver has submitted the timesheet to the RF for processing. Further efforts by a PI/AA require the submission to be revoked and

once edits have been made, re-approved. See the PI section of this manual for further instructions.

4. **Uploaded**: This status indicates that the timesheet has been processed and payroll has been generated by the RF.
5. **Manual**: This status indicates that a timesheet a been manually generated internally for a pay period in a specific appointment line.
6. **Created**: This status indicates that the timesheet has been generated & saved by an employee.

Employee: This is the employee's name and the Employee ID number
Project: This is the appointment's project number.
Pay Period: This is the selected pay period.
Pay Rate: This is the employee's pay rate, stated as an hourly wage or biweekly salary.
Hours/Period: The number of hours the employee is expected to work each period based upon the PAF
Appointment Period: Start and end dates of the appointment.
Remaining Work Hours: The number of remaining work hours on the appointment (hours charged to Regular, Sick, and Other Paid will be deducted from the Remaining Work Hours).
Remaining Annual Hours: The number of remaining annual hours on the appointment (including accrued hours and a projection of hours to be earned by the end of the appointment).
Remaining Total Hours: The total hours remaining (on the specific appointment) since the last payroll.

Please Note: Employees must use the Remaining Annual Hours by the end of the appointment period indicated in the timesheet header. Three pay periods before the encumbrance end date, the e-Timesheet system will generate a pop-up message in figure 18, indicating that work hours are soon coming to an end and advises the employee to schedule annual leave.

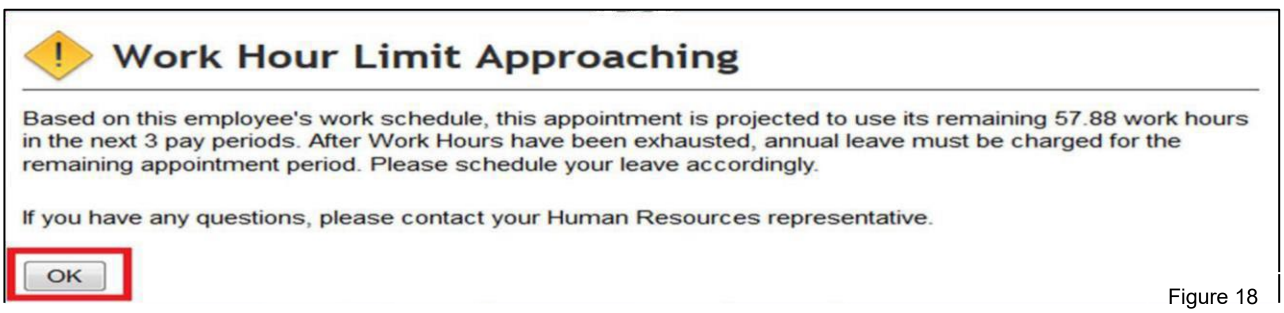


Figure 18

The timesheet body is pre-populated according to the schedule entered in the PAF system or changed in the e-Timesheet system. In this screen, the Timekeeper enters or edits the time (if different from the pre-populated entries) and may add any applicable comments.

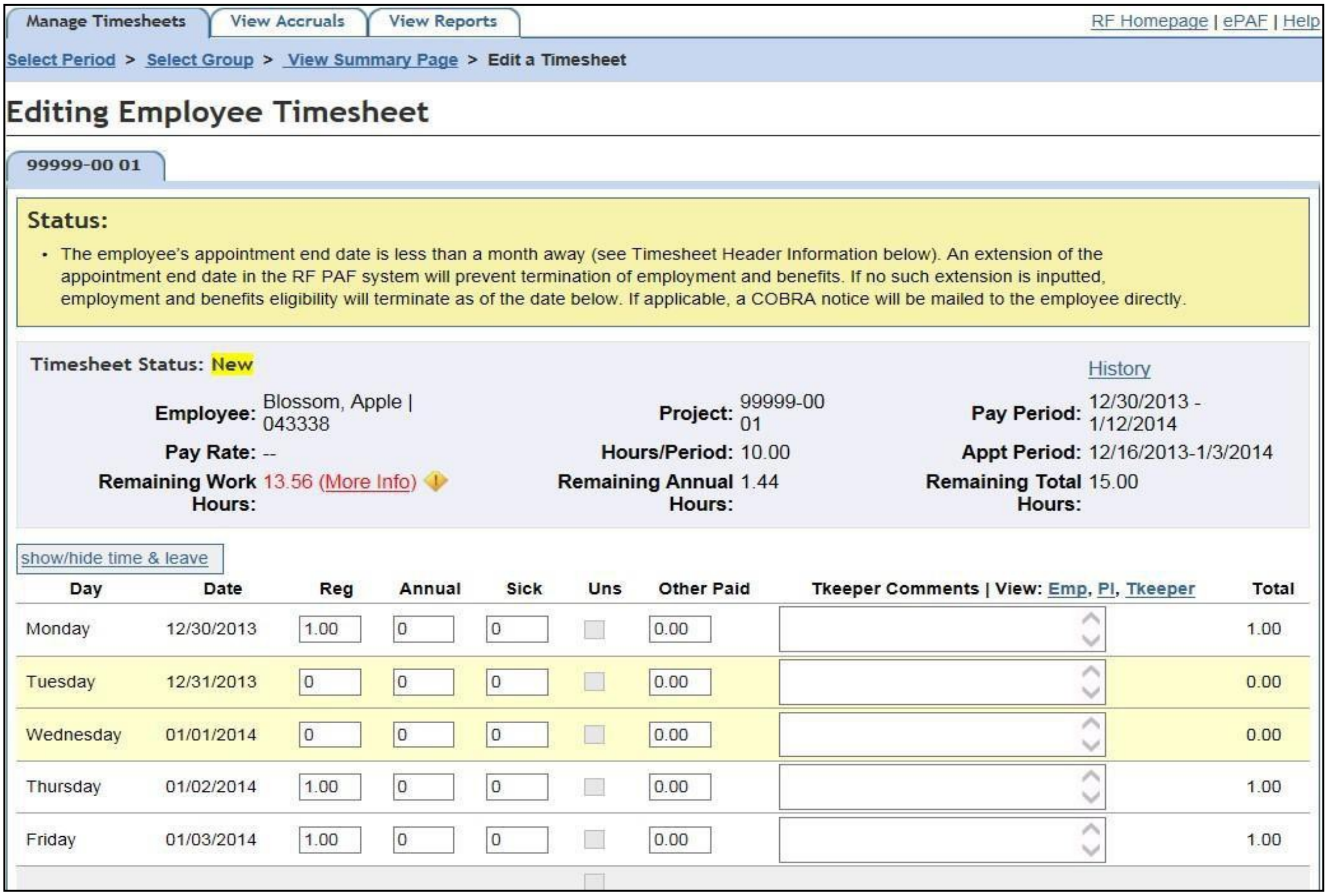


Figure 19

Each row, reading from left to right, is one day. Days that are outside of the appointment period will appear blank and are closed for entry. RF Holidays are highlighted in yellow.
(for full numbered details see figure 7 on page 12)

Each column represents a charge type which are:

- **Reg (Regular):** Time actually worked by the employee on that day.
- **Annual:** Hours charged by the employee for time off as annual leave
- **Sick:** Hours charged by the employee for time off as sick leave. Sick leave may be used for the employee's own care and up to 56 hours may be used for the care of a qualifying family member (Parent, Child, Spouse, Domestic partner, Sibling (including a half, adopted, or step sibling), Grandchild, Grandparent, Child or parent of an employee's spouse or domestic partner). Any other individual related by blood or whose close association with the employee is the equivalent of a family relationship.
- **Uns (Unscheduled Holiday):** For full time employees only - This type of leave requires that time be taken in a whole day block. The amount of hours charged is determined by the employee's pre-defined schedule for that day. For part time employees, this box will be grayed out and unavailable for entry.
- **Other Paid:** Hours charged for other miscellaneous reasons. They are: Mandatory Court Attendance, Death in Family, Health Department Order, Holiday pay, Jury Duty, and Other Authorized time off.
  Please Note: Eligibility for these types of miscellaneous leaves is limited to and dependent upon the employee's status (FT, PT A, PT B, etc.) and FLSA classification.

Please Note: The employee, the Timekeeper, and the PI will not be able to submit a timesheet charging more regular hours than the Remaining Work Hours on the Timesheet Header. At the time the employee exhausts the Remaining Work Hours, the “Regular” column on the timesheet will not permit entry (grey-out). The employee should charge annual leave.

Important

The pre-defined weekly schedule set up by the PI in the PAF (or changed by the PI/AA in the Time & Leave system) will automatically populate each timesheet in the ‘Regular column.

- **Non-Exempt** employees with a predefined schedule can make changes to the pre-populated hours if the actual hours worked differ. The employee will enter the corrected charges in the appropriate column on each day of the week worked. Employees should input a comment in the box to the right for the timekeeper or PI/AA as to why they have made changes to the predefined schedule. If an employee worked on a holiday, there must be a comment in the comment box.
- **Non-Exempt** employees will be paid for all hours charged, regardless of the predefined schedule. Hours actually worked (charged in the ‘Regular column) in excess of 40 hours in any week will be paid at 1.5 times the regular rate of pay.
- **Exempt** employees whose days worked differ from their pre-defined schedule must ask their PI or AA to amend the schedule before correcting entries can be accepted by the system.
- **Exempt** employees who charge fewer or more hours (Reg, Annual, Sick, Uns or Other Paid) than what is in the pre-defined schedule will be paid only for the scheduled hours for that day.
- **Exempt** employees who do not charge any time at all (including any applicable leave accruals) on any scheduled day **will not be paid** for that day at all.

To view comments left by a PI or Employee, click the applicable link at the upper right, just below the **Timesheet Header information.**

To view the audit trail for this timesheet click the **History** link.

To have a quick view of accrual balances, click the **show/hide time and leave** link.

To return to the summary page to select another employee, click the **View Summary Page** link.

To return to the main pay period calendar selection page, click on the **Select Period** link at the top of the page right under **Manage Timesheets**.

To the right of the comment box is a total column that denotes the total hours entered for the day. At the end of each week there is a weekly subtotal and at the end of the 2 week pay period is a **Total Charges** ❶ for the timesheet. If the employee is appointed to more than one appointment for the project, and therefore completes a timesheet for each appointment, these totals take into account hours from all timesheets for the period. (for full numbered details see figure 7 on page 12)

Day	Date	Reg	Annual	Sick	Uns	Other Paid	Comments	Total
Monday	02/03/2014	7.00	0	0	☐	0.00		7.00
Tuesday	02/04/2014	7.00	0	0	☐	0.00		7.00
Wednesday	02/05/2014	7.00	0	0	☐	0.00		7.00
Thursday	02/06/2014	7.00	0	0	☐	0.00		7.00
Friday	02/07/2014	7.00	0	0	☐	0.00		7.00
Saturday	02/08/2014	0.00	0	0	☐	0.00		0.00
Sunday	02/09/2014	0.00	0	0	☐	0.00		0.00
	Week 2 Subtotals:	35.00	0.00	0.00	0.00	0.00		35.00
	Total Charges	70.00	0.00	0.00	0.00	0.00	❶	70.00

❷ Preview Timesheet(s) | Cancel

Figure 20

Once the Timekeeper has finished entering the timesheet, he or she clicks on the **Preview Timesheet(s)** ❷ button at the bottom of the page to proceed. If the employee is on multiple appointments, the timekeeper can choose to preview each timesheet separately by clicking on the **Preview Only This Timesheet** button. The totals displayed when **Preview Only This Timesheet** is selected, correspond only to the timesheet on display.

When a user clicks either of the Preview buttons, the timesheet is displayed for review.

Error messages, if any, will display at the top of the screen as shown in figure 18 on page 24. An error message prevents the timesheet from being submitted. Errors can occur when an employee exceeds the remaining work hours or when the encumbrance remaining is not sufficient to cover for the timesheet charges. Error message are in red.

Warning messages, if any, will display in the status box at the top and bottom of the screen. If the Timekeeper notes, at any time during the timesheet process, that time or encumbrance(s) are nearing an end earlier than expected, s/he should immediately notify the PI/AA. Warning messages are in yellow.

If the Timekeeper does not agree with the displayed information, he or she can click **View/Edit** as shown in figure 16 on page 21 number ❽ to change the information. In order to completely cancel a timesheet, click the **Void Only This Timesheet** button as in figure 9A on page 16.

If the Timekeeper agrees with the information in the timesheet, s/he clicks either the **Save** or **Save and Submit** button to conclude the process. While the **Preview** functionality allowed the user to view all timesheet totals as one, each timesheet must be saved and submitted individually.

Clicking the **Save** button allows the Timekeeper (and employee) to make edits and additional entries to a timesheet at a later time. This will move the timesheet status to **Created**.

Clicking the **Save and Submit** button prevents the Timekeeper (and an employee) from making any further changes. This will move the timesheet status to **Submitted.** If changes need to be made after the timesheet is submitted, the Timekeeper must revoke the timesheet's submission or contact the PI or AA.

By submitting the timesheet, the Timekeeper is certifying the accuracy of the entries. Once the timesheet is submitted, the system will generate a **Notifications ❶** message.

Figure 21

To make changes to a submitted timesheet, click on the **Continue Working with Timesheets for Employee Name ❷**. Then, click on **Revoke Submission** at the bottom of the timesheet page. Return to the **Summary Page** and click **View Edit**. The timesheet is no longer **Submitted** and has reverted back to the status of **Created**.

Alternative Timesheet Submission

An alternative method of timesheet submission is to use the summary page once the actual timesheet for each employee has been reviewed and Saved.

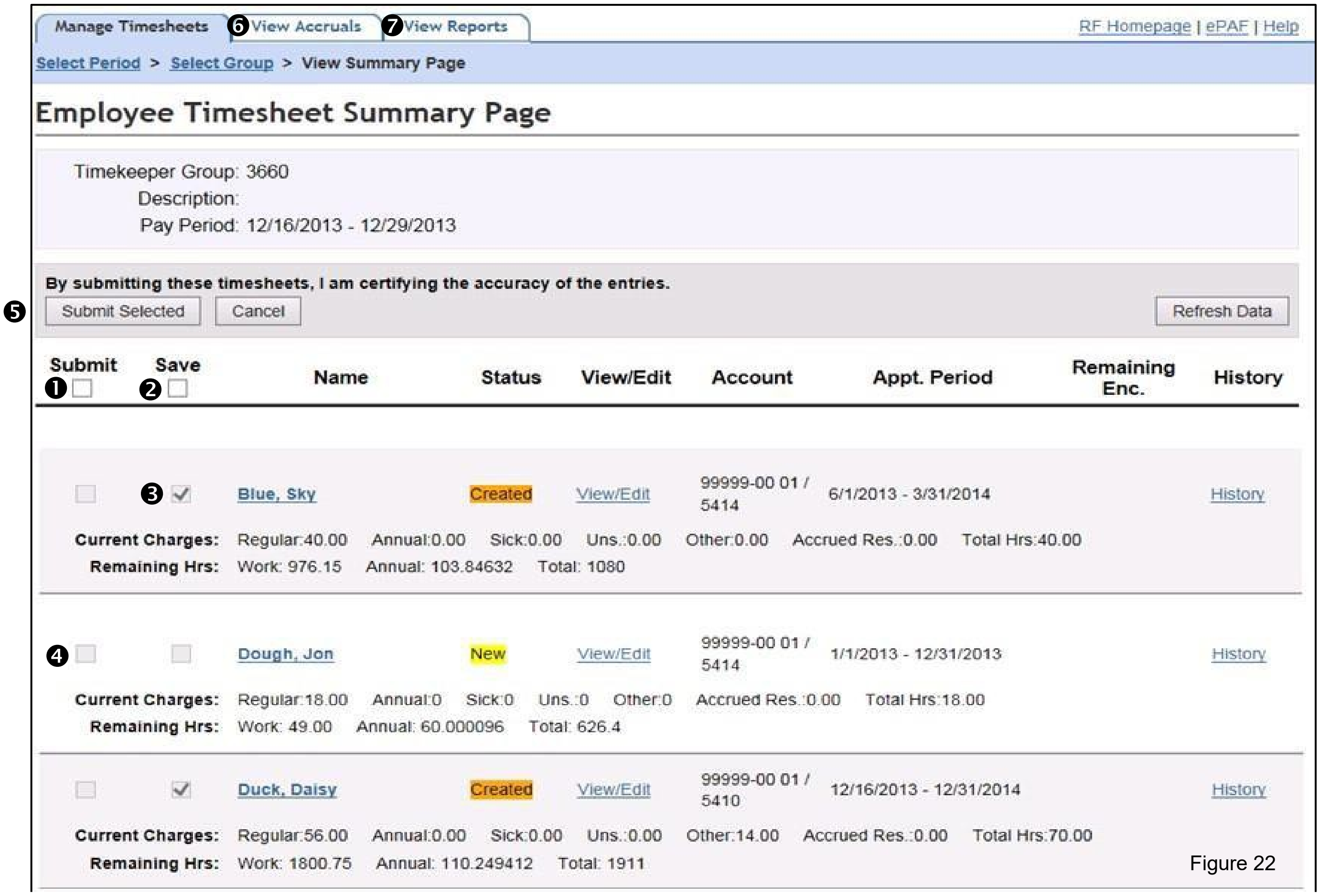


Figure 22

To the left of each employee name are **Submit** ❶ and **Save** ❷ check boxes. For created timesheets, the **Save box** ❸ is checked, as the timesheet was created via the Save button in the **View/Edit** Timesheet screen as seen in figure 16 on page 21 number ❽.

To submit the timesheet, check the **Submit box** ❹ and click the **Submit Selected** ❺ button at the top or bottom of the page.

Please Note: By submitting the timesheets, the Timekeeper is certifying the accuracy of the entries. Therefore, it is important to review each individual timesheet thoroughly before submitting them.

Once a timesheet is **Submitted**, the Timekeeper may log off or click the **View Accruals** ❻ or **View Reports** ❼ tabs at the top of the page.

Daily Time Allocation

Daily Time Allocation is an additional timesheet option for Timekeepers only. This feature allows Timekeepers to input hours for their group(s) on a daily basis rather than at period end. The Daily Allocation method is PRSY and Group specific.

To access the Daily Allocation feature, click on the **Daily Allocation ❷** link under the **Manage Timesheets** tab **❶**.

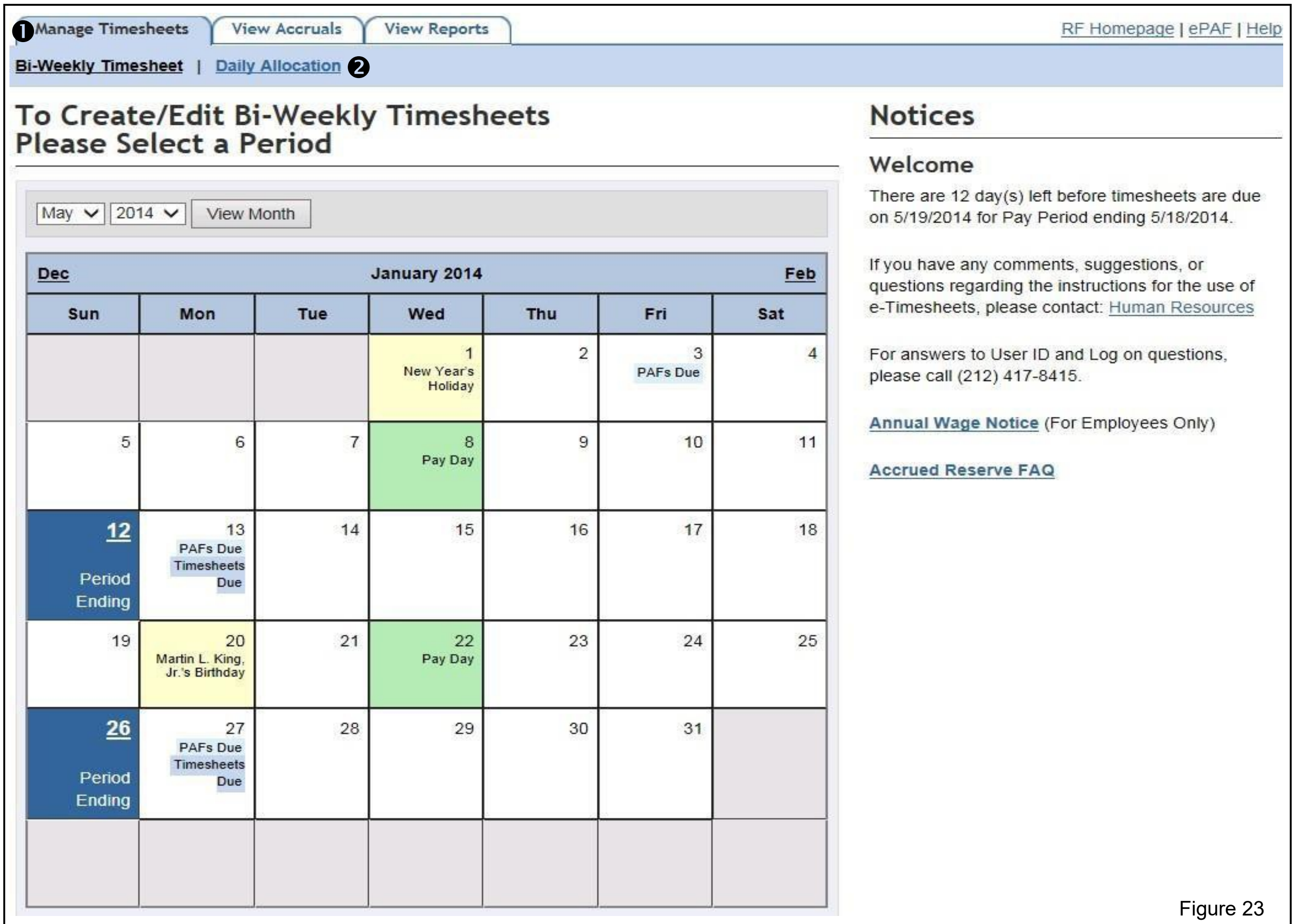


Figure 23

Once the **Daily Allocation** feature is selected, a calendar appears that allows the timekeeper to select any specific day which is underlined.

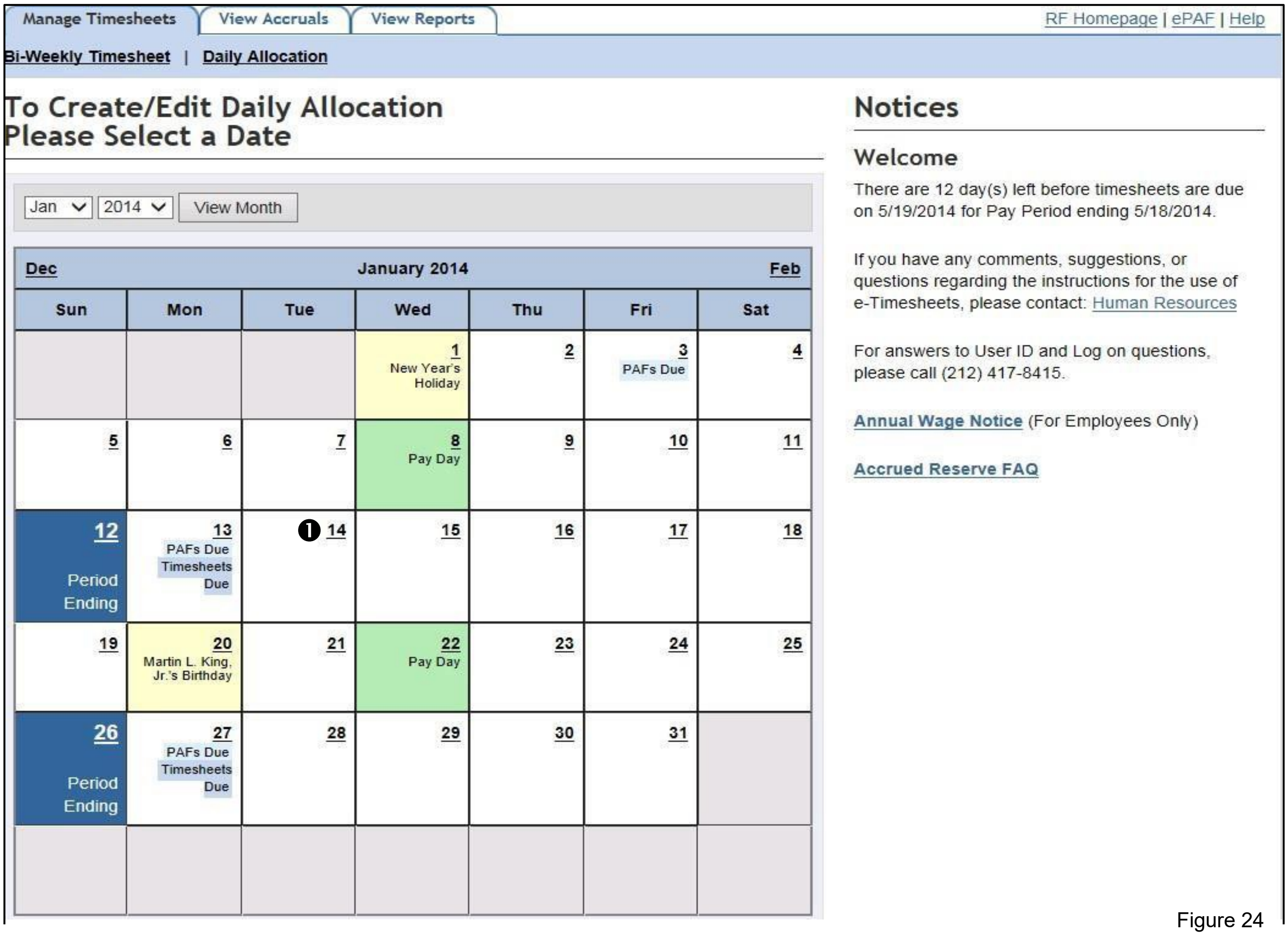


Figure 24

Move your cursor to the required date and click on the underlined date ❶ to begin the Daily Allocation process.

Once a date has been selected, the next screen appears, asking the timekeeper to select the **Group** ❷ in the drop-down menu that is to have time entered for the day. Groups are created and set up by the PI in order to assign employees to a particular Timekeeper for timesheet entry or edit purposes.

Figure 25

Once the group is selected click **Continue ❸.**

Please Note: Using the Daily Allocation method of entering hours does not require that all employees in the group have an entry as not all employees work every day.

Once the group is selected, the summary page will appear listing every employee in the selected group. The Timekeeper enters the hours for **Regular Hrs**, **Annual Hrs**, **Sick Hrs** ❶ and/or Other Paid Leave if added on the summary page by typing the number into the appropriate fields.

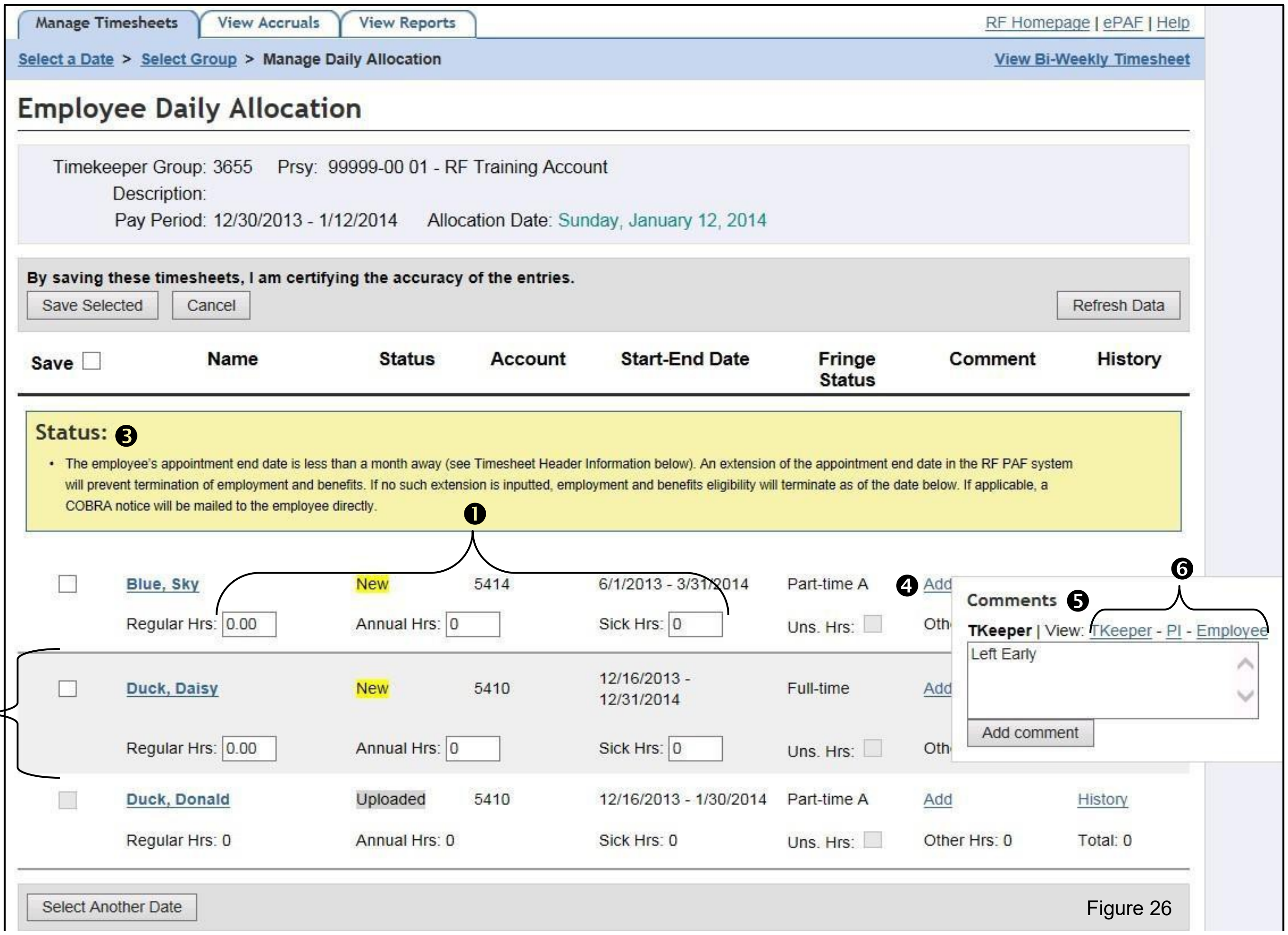


Figure 26

Please Note: The Timekeeper will not be able to submit a timesheet charging more regular hours than the Remaining Work Hours on the Timesheet Header. At the time the employee exhausts the Remaining Work Hours, the **Regular** column on the timesheet will not permit entry (grey-out) ❷. The employee should charge annual leave.

Status ❸ messages will appear on the summary page directly above the employee's line.

To add a comment to the individual timesheet, click the link **Add** ❹ under the Comment column. A small **Comments** ❺ box will appear for the Timekeeper to enter in a comment or view other comments left by a second (or backup) Timekeeper, the PI or the employee. Once you complete the comment click on **Add Comment**. To view comments left by others, click on the link **Timekeeper, PI** or **Employee** ❻ in the comment box.

To save the daily entries, select the timesheet by checking the **white box** ❶ to the left of the employee's name then click the **Save Selected** ❷ button at the top of the summary page.

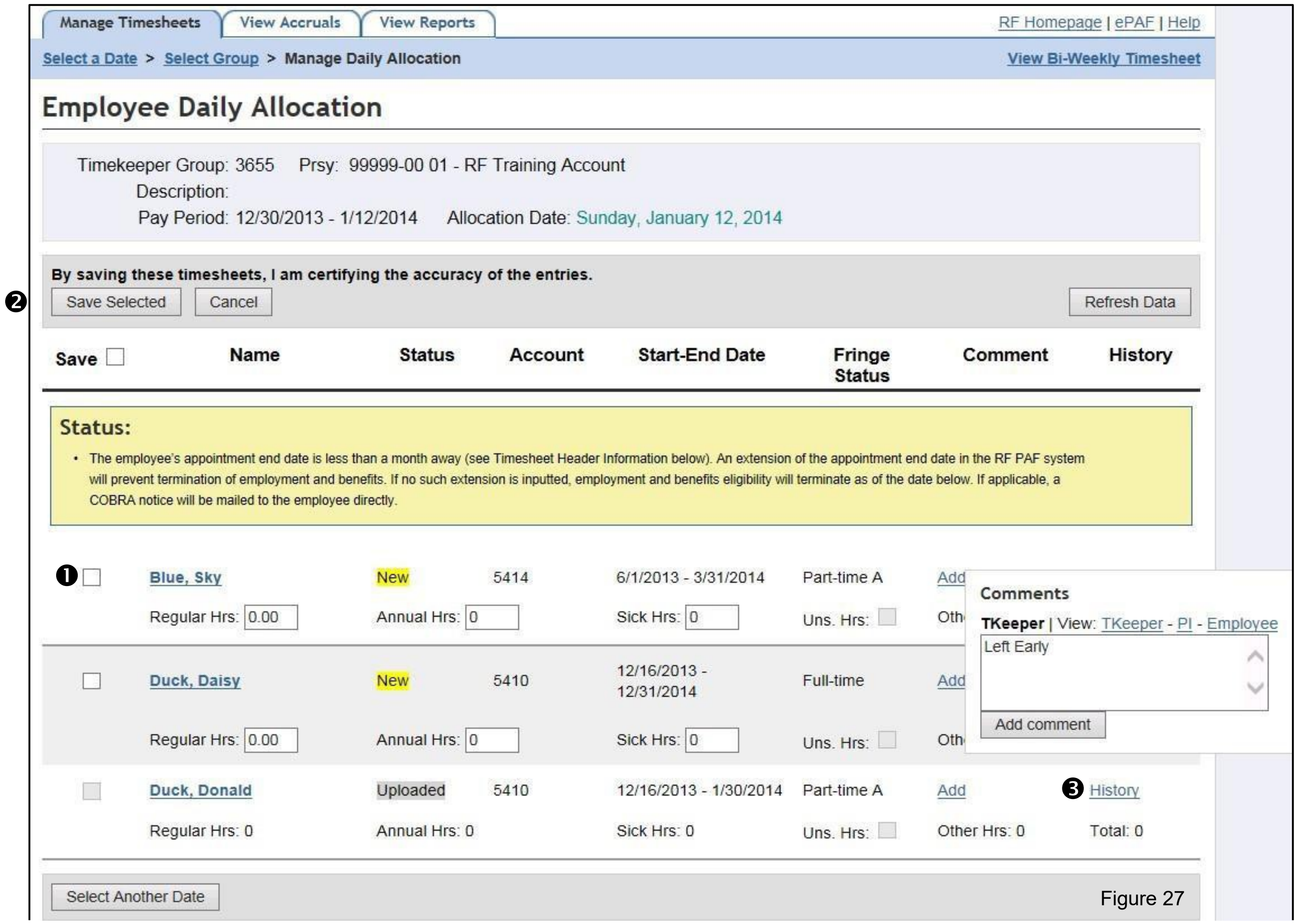


Figure 27

Once the time has been saved, there will be a confirmation that says, **Your timesheet was successfully processed**. Also, the individual timesheet status will state that it is Created.

To view the activity for this timesheet, click on the **History** ❸ link in the Activity column of the summary pages.

After an entry is saved (Created), an employee or another timekeeper can no longer make entries to the timesheet.

+`

Once saved, the timesheets are visible to the PI, but are not yet submitted by the timekeeper. Therefore, the timesheets are still able to be edited by the Timekeeper. Once submitted the Timekeeper can no longer edit the timesheets.

Please Note: Timesheets should be 'submitted' when all of the pay period's daily entries have been processed (at the end of the period, not after each day). If a Timekeeper submits a timesheet before each day's daily allocations are entered, (e.g. mid-period), the timekeeper will have to revoke his or her submission for each employee individually in order to make subsequent daily allocations for that period.

To submit and make changes to the timesheet to the PI, at period end, the Timekeeper must access the Biweekly Timesheet. Click on the link **View Bi-Weekly Timesheet ❶** in the upper right-hand corner of the daily Timesheet page.

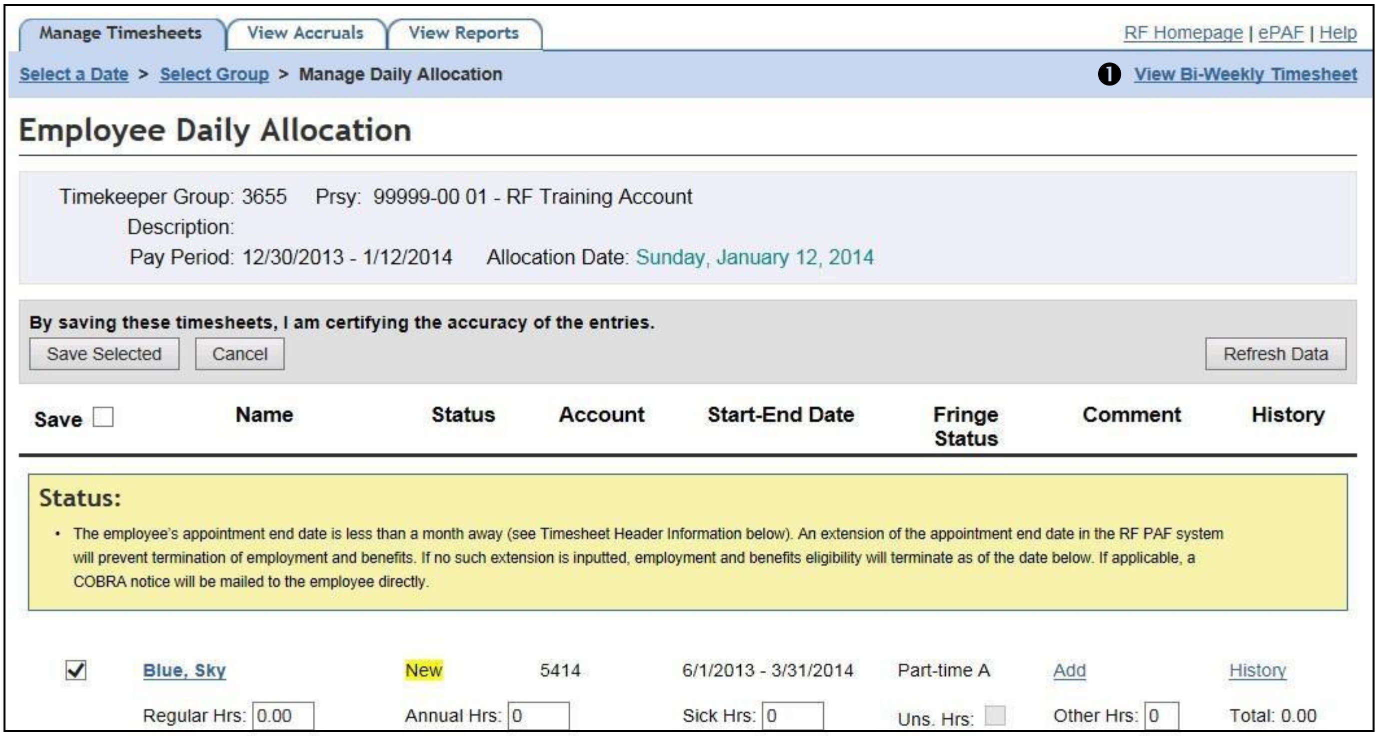


Figure 28

After clicking on View Bi-Weekly Timesheet, Select the pay period in question from the calendar. Click on **View/Edit** to edit the individual employee's timesheet and click the **Revoke Submission** button at the bottom of the page. Once the submission is revoked, the timekeeper can edit or void the timesheet.

View Accruals

To view accruals for the employees assigned to a specific group, Click the **View Accruals** ❶ tab at the top of the screen. Next, the Timekeeper must **Select a Group** ❷ of employees from the drop-down menu. Once the group is selected click the **View Accruals** ❸ button in figure 29.

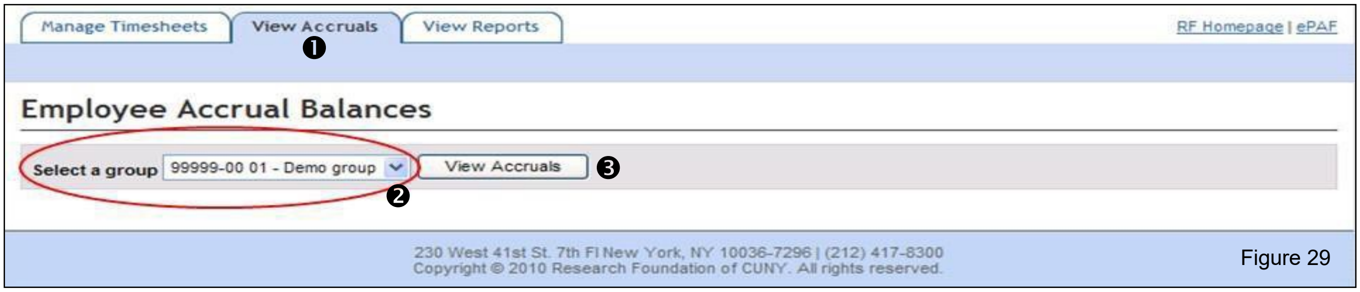
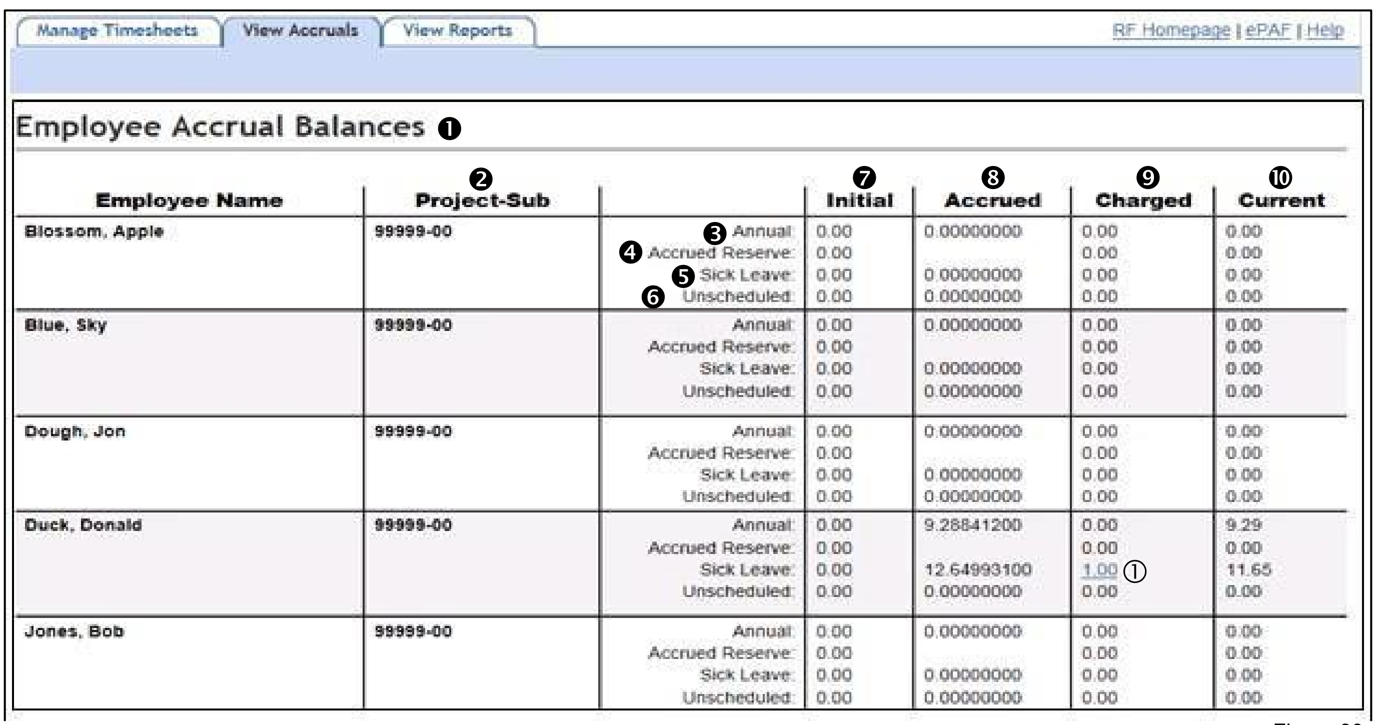


Figure 29

What follows is the **Employee Accrual Balances** ❶ screen. Each employee assigned to the selected group is listed in alphabetical order by last name. To the right of the employee's name are the accrual balance grid that shows the **Project-Sub** ❷ number, **Annual** ❸, **Accrued Reserve** ❹, **Sick** ❺, and **Unscheduled** Holiday Leave ❻ earnings. The other columns consist of the **Initial** ❼, **Accrued** ❽, **Charged** ❾ and **Current** ❿ available balances for all appointments on the same project in figure 30.

Under the Charged column, the Timekeeper can click on the **Charged** ① underlined hour to see more information about the used accruals such as when and in which period the time was used.



Employee Name	❷ Project-Sub		❼ Initial	❽ Accrued	❾ Charged	❿ Current
Blossom, Apple	99999-00	❸ Annual:	0.00	0.00000000	0.00	0.00
		❹ Accrued Reserve:	0.00		0.00	0.00
		❺ Sick Leave:	0.00	0.00000000	0.00	0.00
		❻ Unscheduled:	0.00	0.00000000	0.00	0.00
Blue, Sky	99999-00	Annual:	0.00	0.00000000	0.00	0.00
		Accrued Reserve:	0.00		0.00	0.00
		Sick Leave:	0.00	0.00000000	0.00	0.00
		Unscheduled:	0.00	0.00000000	0.00	0.00
Dough, Jon	99999-00	Annual:	0.00	0.00000000	0.00	0.00
		Accrued Reserve:	0.00		0.00	0.00
		Sick Leave:	0.00	0.00000000	0.00	0.00
		Unscheduled:	0.00	0.00000000	0.00	0.00
Duck, Donald	99999-00	Annual:	0.00	9.28841200	0.00	9.29
		Accrued Reserve:	0.00		0.00	0.00
		Sick Leave:	0.00	12.64993100	1.00 ①	11.65
		Unscheduled:	0.00	0.00000000	0.00	0.00
Jones, Bob	99999-00	Annual:	0.00	0.00000000	0.00	0.00
		Accrued Reserve:	0.00		0.00	0.00
		Sick Leave:	0.00	0.00000000	0.00	0.00
		Unscheduled:	0.00	0.00000000	0.00	0.00

Figure 30

Accruals are earned based upon the number of hours submitted in a timesheet for a specific project. (Please see the **RF Time Off and Leave policy 506** for more information.)

View Reports

This feature allows the Timekeeper to view two reports. Click on the **View Reports ❶** tab at the top of the screen. Next, select a report, **Attendance Reports by PRSY ❷** or **Annual Leave Projection by Project Report ❸** you wish to generate in figure 31.

Figure 31

Attendance Report by PRSY

To generate the Attendance Report, **Select a Pay Period ❶** and **Select a Group ❷** from the drop-down menu. Then, click **View Report ❸** in figure 32.

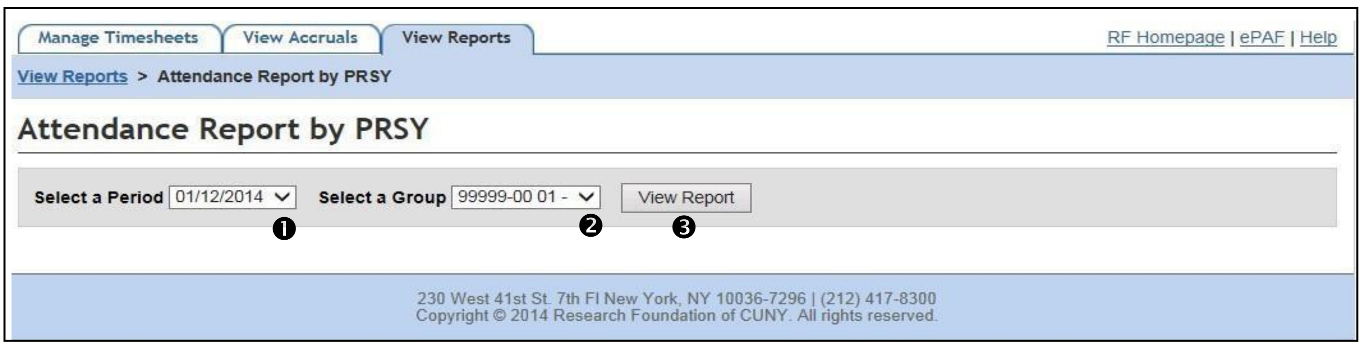
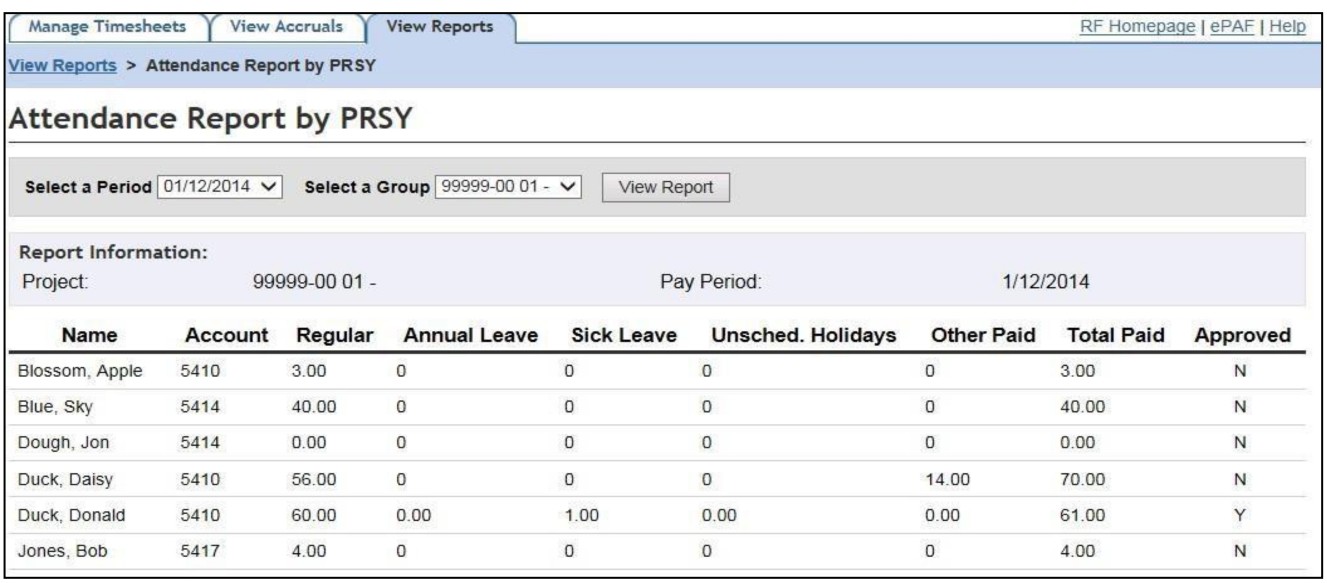


Figure 32

The subsequent report is a list of timesheets entered for the selected period. Report information includes the entered time in each of the timesheet's columns, the total amount of hours paid, and the status of the timesheet as seen in figure 33.



Name	Account	Regular	Annual Leave	Sick Leave	Unsched. Holidays	Other Paid	Total Paid	Approved
Blossom, Apple	5410	3.00	0	0	0	0	3.00	N
Blue, Sky	5414	40.00	0	0	0	0	40.00	N
Dough, Jon	5414	0.00	0	0	0	0	0.00	N
Duck, Daisy	5410	56.00	0	0	0	14.00	70.00	N
Duck, Donald	5410	60.00	0.00	1.00	0.00	0.00	61.00	Y
Jones, Bob	5417	4.00	0	0	0	0	4.00	N

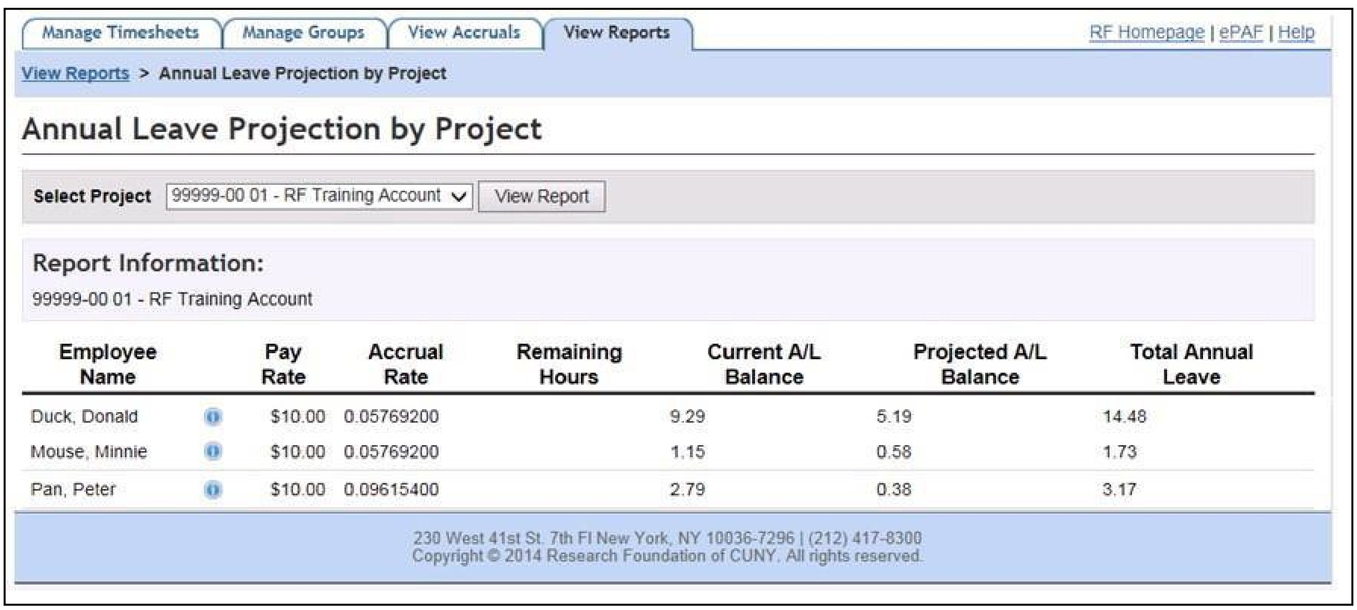
Figure 33

Annual Leave Projection by Project Report

To generate the Annual Leave Projection Report, **Select Project ❶** number from the drop-down menu. Then, click **View Report ❷** in figure 34.

Figure 34

This report list the employee's Annual Leave Projection by Project selected in figure 35 list their pay rate, annual leave accrual rate, current annual leave balance on the PRSY, a projection of annual leave hours to be earned by the end of the current appointment, and a total annual leave balance. The report information can be used to assist PIs in planning the use of accrued annual leave.



Employee Name	Pay Rate	Accrual Rate	Remaining Hours	Current A/L Balance	Projected A/L Balance	Total Annual Leave
Duck, Donald	$10.00	0.05769200		9.29	5.19	14.48
Mouse, Minnie	$10.00	0.05769200		1.15	0.58	1.73
Pan, Peter	$10.00	0.09615400		2.79	0.38	3.17

Figure 35

The PI/Authorized Approver Option

This option is for the Project PI or an Authorized Approver (a designated person) who is responsible to approve timesheets for all employees on all projects under the person's domain. The PI/AA access level has authority to submit timesheets to the RF.

Timesheets that are **New** or **Created** and/or **Submitted** by employees or Timekeepers can be initiated, edited and approved by the PI/AA.

The PI can designate an Authorized Approver from among the project's employees or elsewhere. In order to designate a person the PI must contact the Web Access Security Team at weblogonid@rfcuny.org or 212-417-8450.

Please Note: Authorized Approver access must be requested for each project and each time the project is renewed (when the project number's last 2 digits change PPPPP SS YY).

When a user accesses the Time and Leave System as a PI/AA, the features that are available are displayed at the top of the screen as separate tabs. They are,

Manage Timesheets (Default display): This feature is where the PI/AA selects a pay period and enters, edits, approves, and/or views a timesheet.

Manage Groups: This feature allows the PI to assign some or all project employees to one or more timekeepers who are themselves encumbered on the project.

View Accruals: This feature allows the PI/AA to view the leave accrual balances for all employees assigned to him or her.

View Reports: This is where the PI/AA can view timesheet reports for a selected period and view the PRSY's annual leave liability report.

To select a feature, click the appropriate tab at the top of figure 36 on page 39.

Manage Timesheets

The PI/AA has one method of timesheet management: Biweekly Timesheet. This method is used to enter and submit the timesheet for the entire pay period.

To create, edit, approve, and/or view timesheets. For full details on the process see **Biweekly Timesheet Method** on page 20 and follow the steps.

The PI/AA must choose the appropriate pay period. The current pay period and up to 4 retroactive pay periods will be available for entry. All previous pay periods which have already been paid are for view only. Submission of timesheets for periods prior to the 4 available retroactive pay periods must be submitted via an **RF paper timesheet**, signed by the employee and PI/AA.

To select a pay period, click the pay period end date**.**

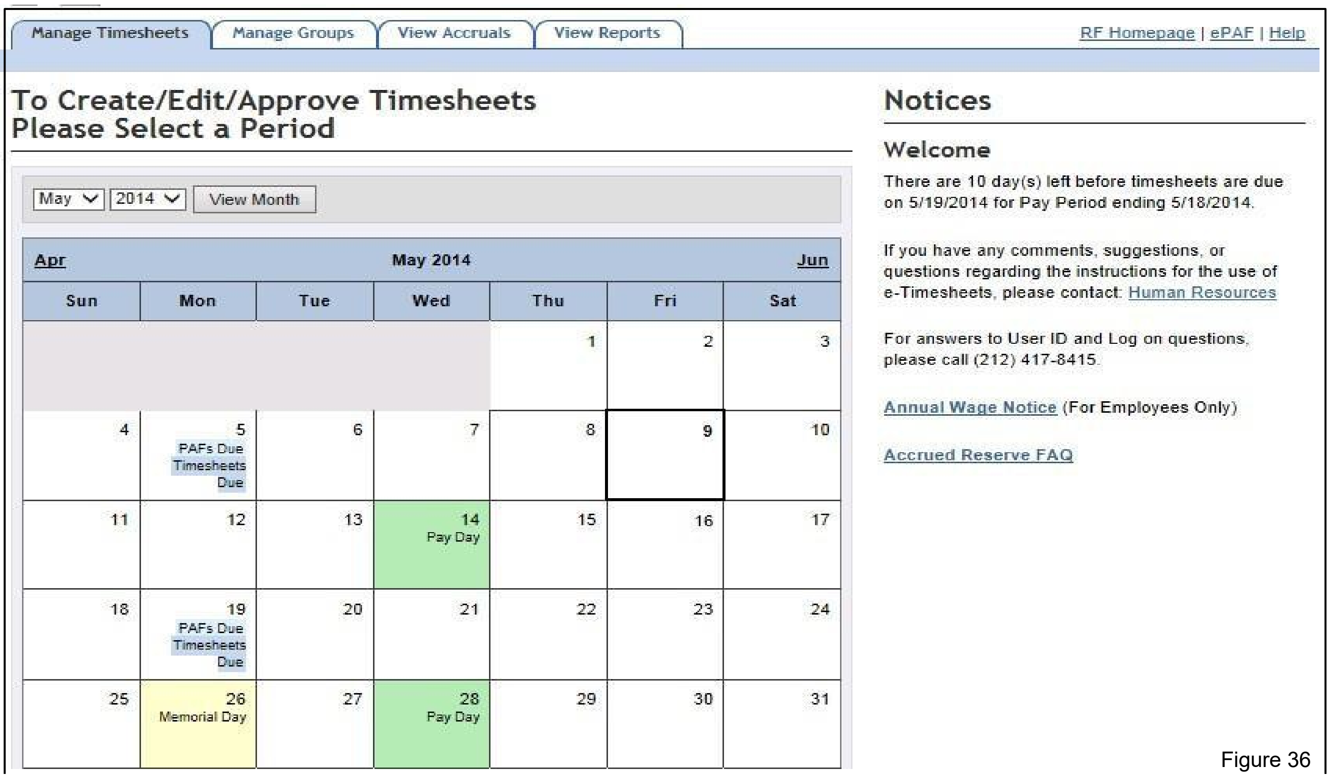


Figure 36

Selecting a pay period end date will display the Employee Timesheet Summary page. The employees on all of the PI/AA's projects are listed alphabetically up to a maximum of 40 separate appointments. Each line represents a separate timesheet. For those PI/AAs that have active appointments for the pay period in excess of 40, an intermediate screen will appear requiring the PI/AA to select a project. This most often happens when a fiscal year end occurs in the middle of a pay period. Each Fiscal Year's appointment is a separate line, requiring a separate timesheet.

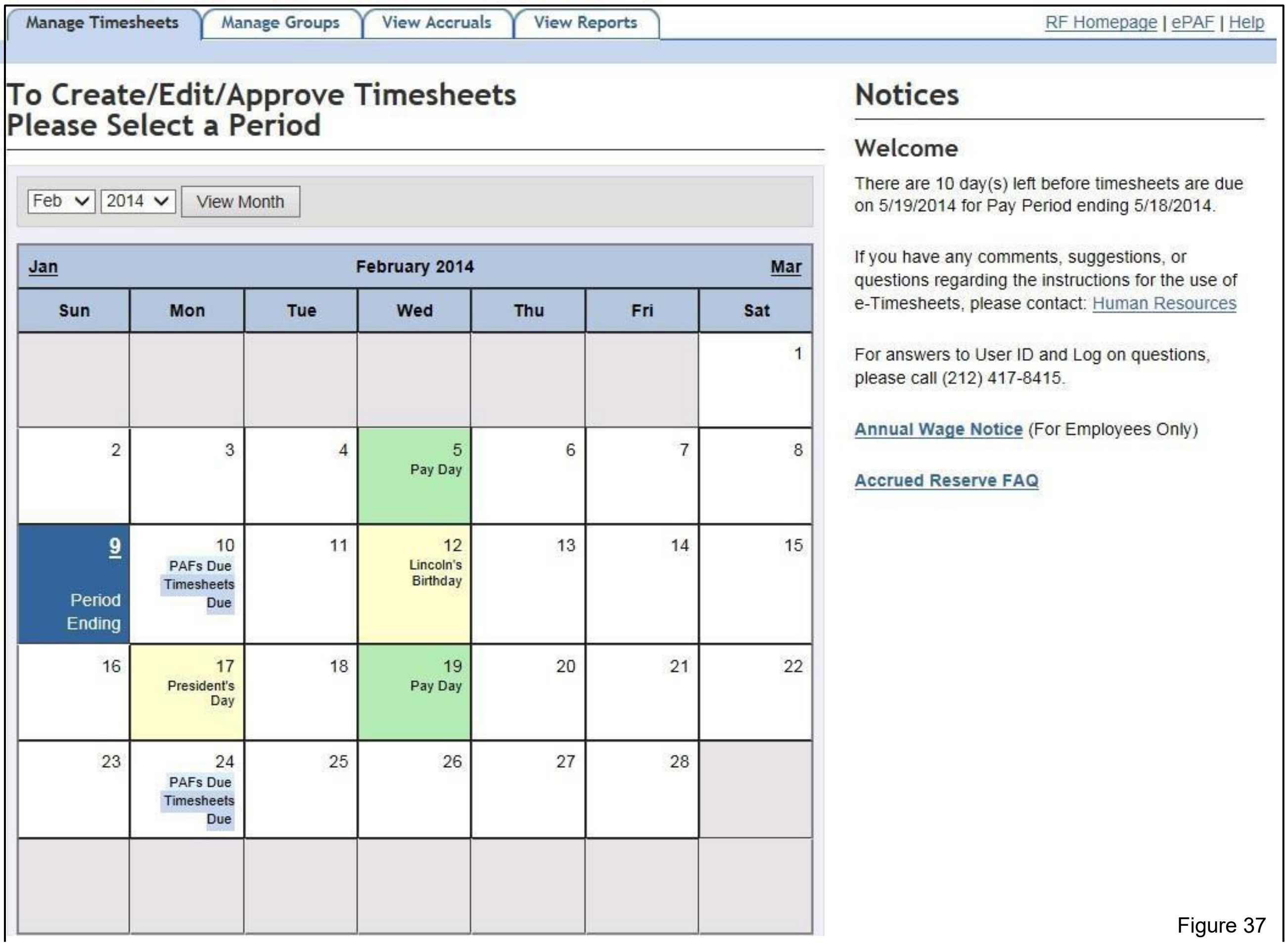


Figure 37

This is the Project Employees Summary Page. At the top of the page is the selected Project number. The employee's in the selected project are listed alphabetically.

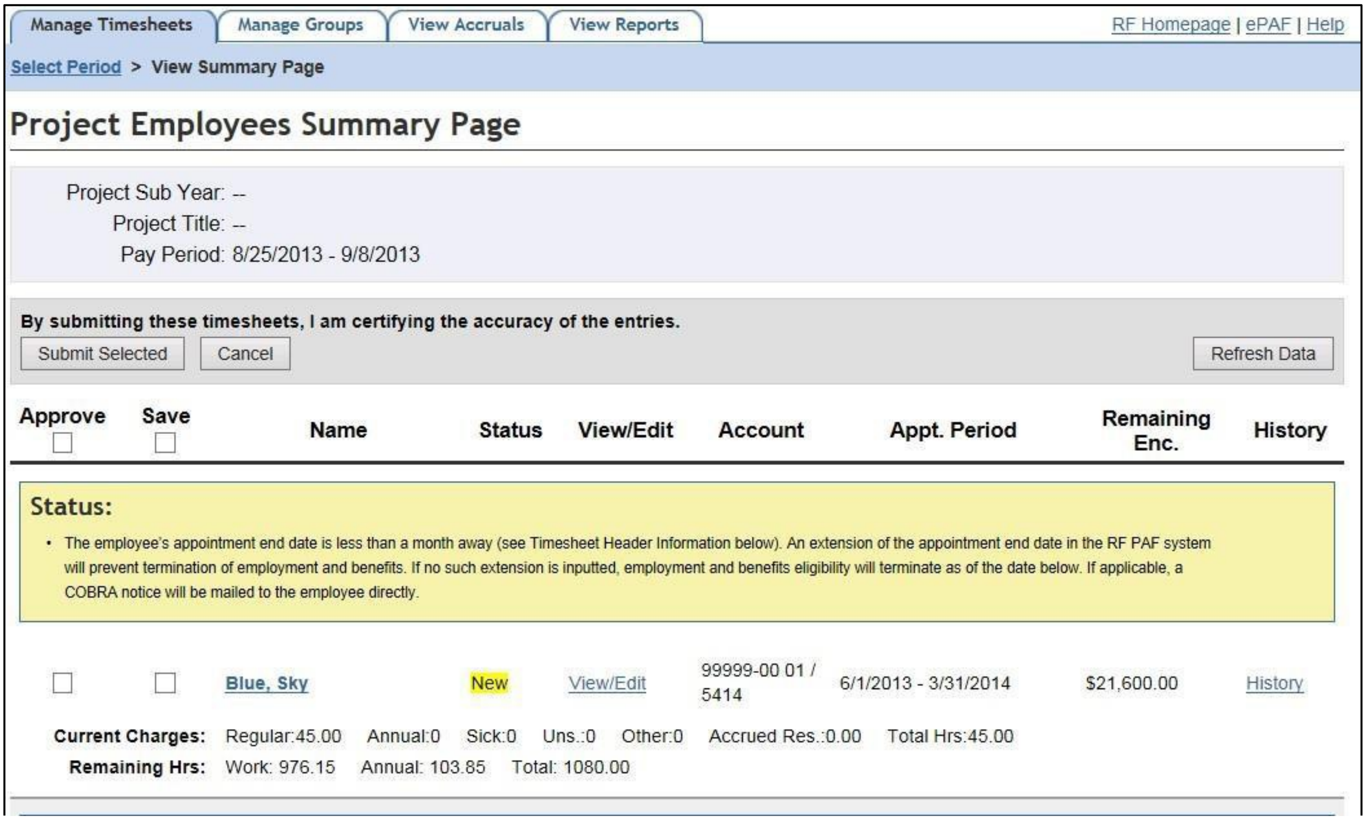


Figure 38

Reading across each employee section from left to right, the following information regarding the employee's appointment and timesheet that is pre-populated based on the pre-defined schedule from the PAF is displayed. (for full numbered details see figure 16 on page 21)

- **Employee Name:** Click on the Employee's name to view the employee's profile page where detailed information regarding the employee's appointment, the employee's pre-defined schedule, and accruals can be found.
- **Status (of the timesheet):** This field will change color as the timesheet progresses through the payroll process.
- **New:** This status indicates that the timesheet has not been generated and is ready for entry. **Created:** This status indicates that the timesheet has been generated & saved by an employee or timekeeper and is available for further input at a later time.
- **Submitted:** This status indicates that the timesheet has been closed to entries by an employee or timekeeper. The PI or Authorized Approver may still edit the timesheet.
- **Approved:** This status indicates that the PI or Authorized Approver has submitted the timesheet to the RF for processing. Further efforts by a PI / AA require the submission to be revoked and once edits have been made, re-approved.
- **Uploaded:** This status indicates that the timesheet has been processed and payroll has been generated by the RF.
- **Manual:** T This status indicates that a timesheet a been manually generated internally for a pay period in a specific appointment line.
- **View/Edit:** Click on this field to access the actual timesheet.
- **PRSY/Account:** The Project # for this appointment.
- **Start-End Dates:** The appointment's start and end dates.
- **History:** Click here to view the audit trail for this timesheet.

The next line down within each employee section displays information about the timesheet.

- **Current Charges**: Displays the number of hours charged on the timesheet.
- **Regular Hours:** The number of hours inputted in the ‘Regular column of the timesheet that reflects actual hours worked. For timesheets with a status of New, the Regular hours will be pre-populated with the PAF’s pre-defined schedule.
- **Annual Hrs:** The number of hours inputted in the Annual column of the timesheet.
- **Sick Hrs:** The number of hours inputted in the Sick column of the timesheet.
- **Uns Hrs:** The number of hours inputted in the Unscheduled Holiday column of the timesheet.
- **Other Hrs:** The number of hours inputted in the Other column of the timesheet.
- **Accrued Res**: The number of accrued reserve hours charged on the timesheet.
- **Total Hrs:** The overall number of hours to be paid for the entire timesheet.
- **Remaining Hours:** The total hours remaining (on the specific appointment) since the last payroll.
- **Work:** Remaining work hours on the appointment.
- **Annual:** Remaining annual hours on the appointment.
- **Total:** The total hours remaining on the appointment.

Please Note: These numbers do not represent any retroactive pay period timesheets (paper or electronic) that are pending for the payroll.

To view the employee’s profile page and/or edit the employee’s pre-defined schedule, click the **Employee’s Name**.

To enter or view a timesheet, click on **View/Edit**.

To return to the main pay period calendar selection page, click on the **Select Period** link at the top of the page right under **Manage Timesheets**.

The Employee Profile Page

Clicking on the Employee's Name in the Summary Page in figure 38 on page 41 will bring the PI/AA to the **Employee's Profile ❶** which includes the appointment's information and predefined schedule.

The schedule area displays the employee's pre-defined schedule as inputted by the PI in the PAF system or changed in the timesheet system. Each week is listed separately as **Week 1 Schedule ❷** and so forth.

To change the predefined schedule, the PI/AA enters the new schedule's hours for each week in the **Regular Hours ❸** column and clicks **Save ❹**. To switch from Regular to Summer hours (or vice versa), select the **Active Button ❺** under the respective column, then click Save. A message will appear confirming the updated schedule. The total number of hours in the updated schedule must match the Hrs per Period from the appointment's PAF.

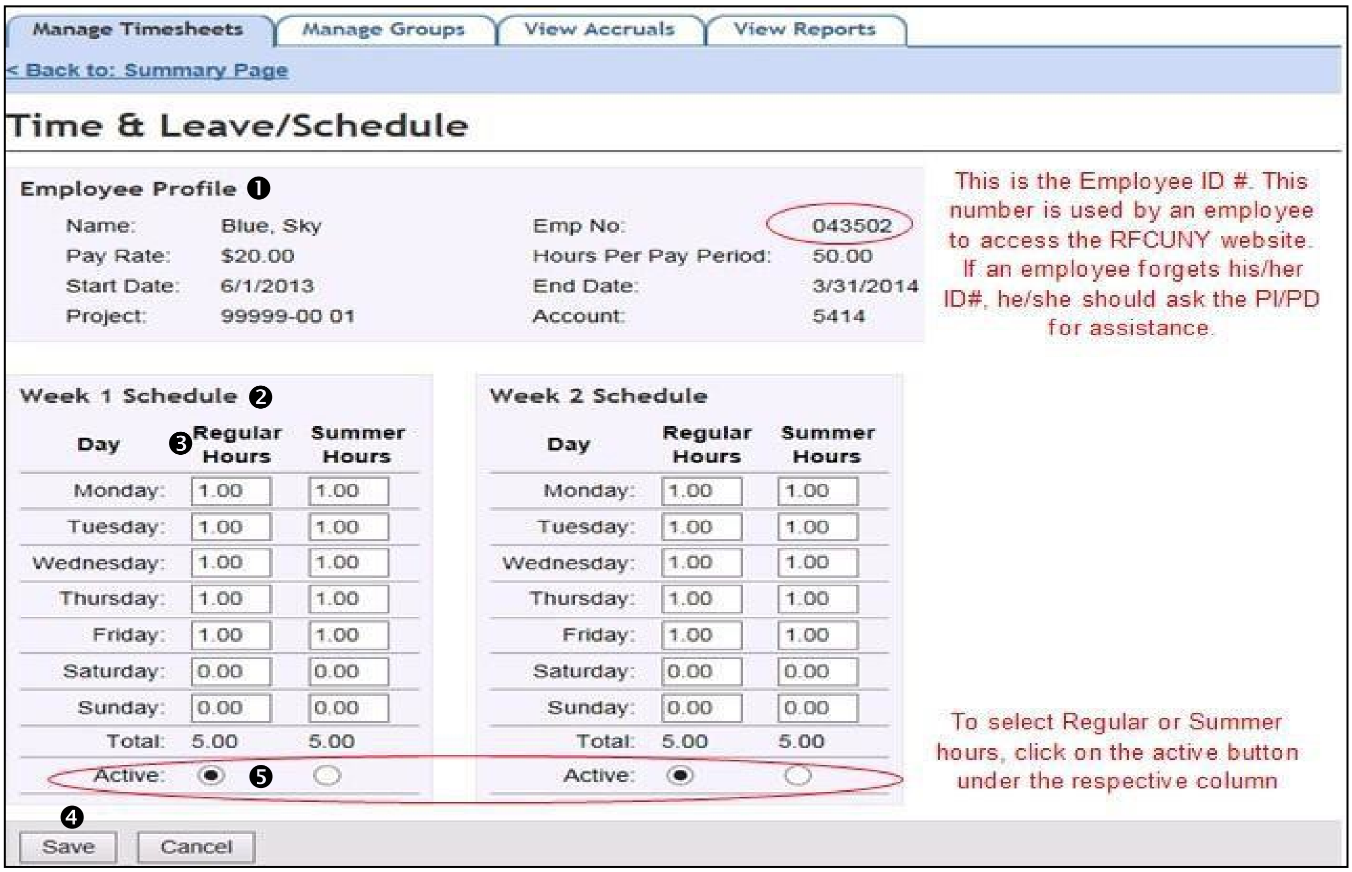


Figure 39

Important

The pre-defined weekly schedule set up by the PI in the PAF (or changed by the PI/AA in the Time & Leave system) will automatically populate each timesheet in the Regular column.

- **Non-Exempt** employees with a predefined schedule can make changes to the pre-populated hours if the actual hours worked differ. The employee will enter the corrected charges in the appropriate column on each day of the week worked. Employees should input a comment in the box to the right for the timekeeper or PI/AA as to why they have made changes to the pre-defined schedule. If an employee worked on a holiday, there must be a comment in the comment box.
- **Non-Exempt** employees will be paid for all hours charged, regardless of the predefined schedule. Hours actually worked (charged in the 'Regular column) in excess of 40 hours in any week will be paid at 1.5 times the regular rate of pay.

- **Exempt** employees whose days worked differ from their pre-defined schedule must ask their PI or AA to amend the schedule before correcting entries can be accepted by the system.
- **Exempt** employees who charge fewer or more hours (Reg, Annual, Sick, Uns, or Other Paid) than what is in the pre-defined schedule will be paid only for the scheduled hours for that day.
- **Exempt** employees who do not charge any time at all (including any applicable leave accruals) on any scheduled day **will not be paid** for that day at all.

View/Edit Timesheets

This is the View/Edit Timesheet screen. Listed at the top, as tabs, are all the appointments that the employee is currently appointed to for the selected project and which cover the selected pay period. Each tab represents a separate timesheet.

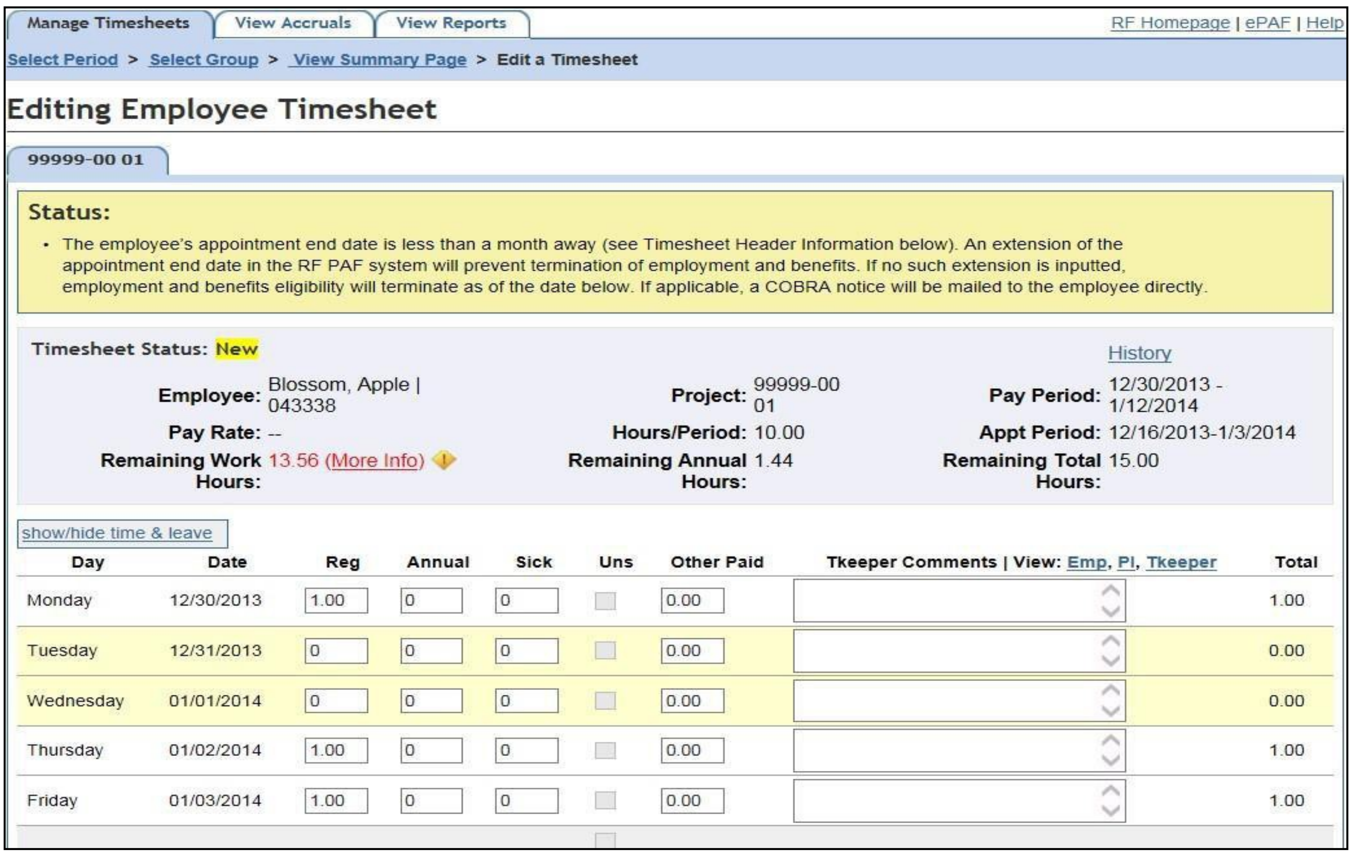


Figure 40

Beginning at the top left and reading across is the Timesheet Header Information section which displays information from the employee's PAF for this appointment.
(for full numbered details see figure 7 on page 12)

Timesheet Status: This field will change to the following descriptions & colors as the timesheet progresses through the payroll process.

New: This status indicates that the timesheet has not been generated and is ready for entry.
Created: This status indicates that the timesheet has been generated & saved by an

Submitted: This status indicates that the timesheet has been closed to entries by an employee or timekeeper. The PI or Authorized Approver may still edit the timesheet.
Approved: This status indicates that the PI or Authorized Approver has submitted the

timesheet to the RF for processing. Further efforts by a PI / AA require the submission to be revoked and once edits have been made, re-approved.
Uploaded: This status indicates that the timesheet has been processed and payroll has been generated by the RF.
Manual: This status indicates that a timesheet a been manually generated internally for a pay period in a specific appointment line.
Employee Name and Employee ID #.
Project: This is the appointment's project number.
Pay Period: This is the selected pay period.
Pay Rate: This is the employee's pay rate, stated as an hourly wage or biweekly salary.
Hours per period (the number of hours the employee is expected to work each period based upon the PAF).

- Appointment Period- Start and end dates of the appointment.
- Remaining Work Hours- The number of remaining work hours on the appointment (including regular, sick, and other hours.
- Remaining Annual Hours- The number of remaining annual hours on the appointment (including accrued hours and a projection of hours to be earned by the end of the appointment).
- Remaining Total Hours: The total hours remaining (on the specific appointment) sincethe last payroll.

Please Note: Employees must use the Remaining Annual Hours by the end of the appointment period indicated in the timesheet header. Three pay periods before the encumbrance end date, the e-Timesheet system will generate a pop-up message in figure 41 indicating that work hours are soon coming to an end and advises the employee to schedule annual leave.

Figure 41

The timesheet body is pre-populated according to the schedule entered in the E-PAF system or changed in the Time and Leave system. In this screen, the PI/AA enters or edits the time (if different from the pre-populated entries) and may add any applicable comments.
(for full numbered details see figure 7 on page 12)

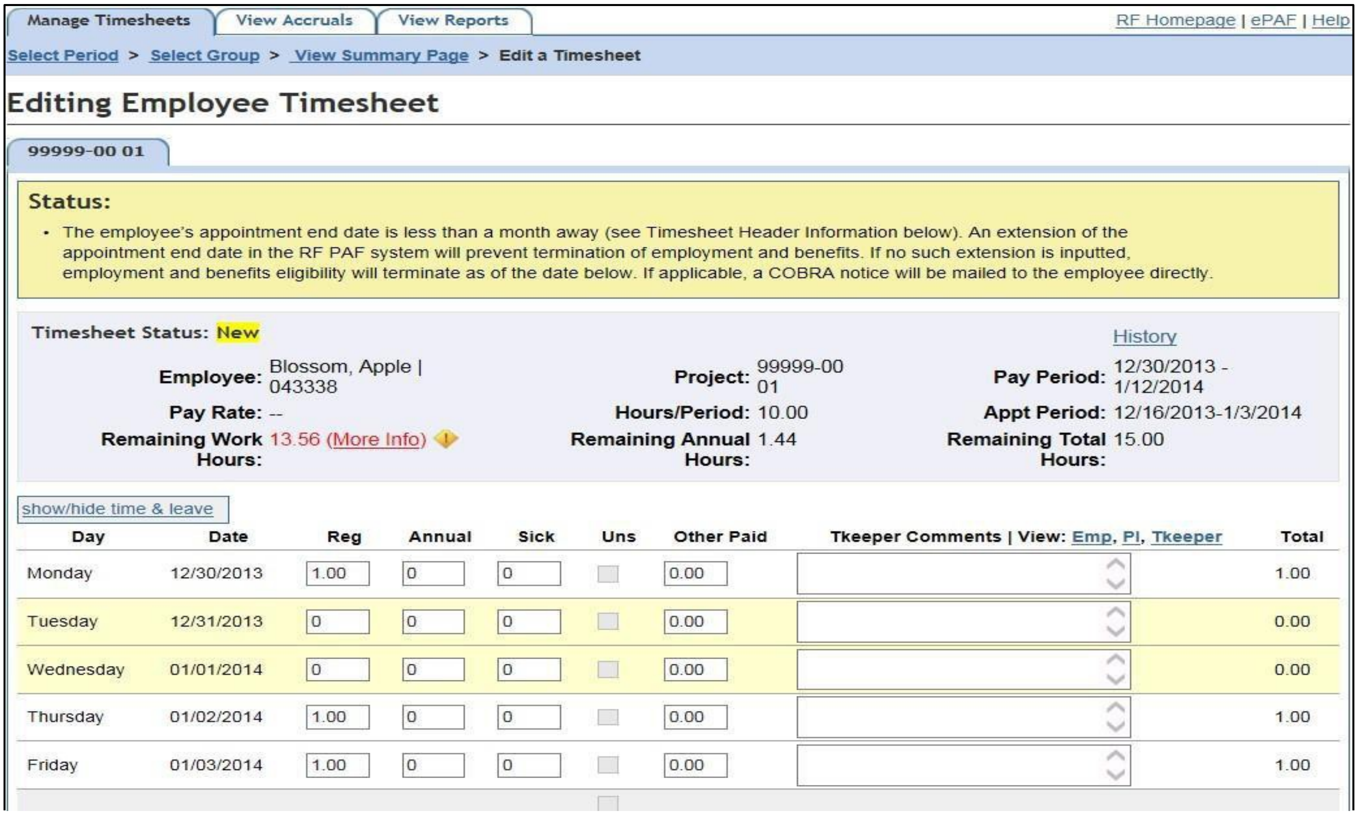


Figure 42

Each row, reading from left to right, is one day. Days that are outside of the appointment period will appear blank and are closed for entry. RF Holidays are highlighted in yellow.

Each column represents a charge type. They are,

- **Reg (Regular):** Time actually worked by the employee on that day.
- **Annual**: Hours charged by the employee for time off as annual leave.
- **Sick:** Hours charged by the employee for time off as sick leave. Sick leave may be used for the employee's own care and up to 56 hours may be used for the care of a qualifying family member (Parent, Child, Spouse, Domestic partner, Sibling (including a half, adopted, or step sibling), Grandchild, Grandparent, Child or parent of an employee's spouse or domestic partner). When charging sick leave, employees are required to designate the leave as 'Self' or 'Family Member'. The 'Family Member' option should be selected when sick leave time taken is for the care of a qualifying family member.
- **Uns (Unscheduled Holiday):** For full time employees only - This type of leave requires that time be taken in a whole day block. The amount of hours charged is determined by the employee's pre-defined schedule for that day. For part time employees, this box will be grayed out and unavailable for entry.
- **Other Paid:** Hours charged for other miscellaneous reasons. They are: Mandatory Court Attendance, Death in Family, Health Department Order, Holiday pay, Jury Duty, and Other Authorized time off.
  Please Note: Eligibility for these types of miscellaneous leaves is limited to and dependent upon the employee's status (FT, PT A, PT B, etc.) and FLSA classification.

Please Note: The employee, the Timekeeper, and the PI will not be able to submit a timesheet charging more regular hours than the Remaining Work Hours on the Timesheet Header. At the time the employee exhausts the Remaining Work Hours, the "Regular" column on the timesheet will not permit entry (grey-out). The employee should charge annual leave.

Important

The pre-defined weekly schedule set up by the PI in the PAF (or changed by the PI/AA in the Time & Leave system) will automatically populate each timesheet in the ‘Regular column.

- **Non-Exempt** employees with a predefined schedule can make changes to the pre-populated hours if the actual hours worked differ. The employee will enter the corrected charges in the appropriate column on each day of the week worked. Employees should input a comment in the box to the right for the timekeeper or PI/AA as to why they have made changes to the predefined schedule. If an employee worked on a holiday, there must be a comment in the comment box.
- **Non-Exempt** employees will be paid for all hours charged, regardless of the predefined schedule. Hours actually worked (charged in the ‘Regular column) in excess of 40 hours in any week will be paid at 1.5 times the regular rate of pay.

- **Exempt** employees whose days worked differ from their pre-defined schedule must ask their PI or AA to amend the schedule before correcting entries can be accepted by the system.
- **Exempt** employees who charge fewer or more hours (Reg, Annual, Sick, Uns or Other Paid) than what is in the pre-defined schedule will be paid only for the scheduled hours for that day.
- **Exempt** employees who do not charge any time at all (including any applicable leave accruals) on any scheduled day *will not be paid* for that day at all.

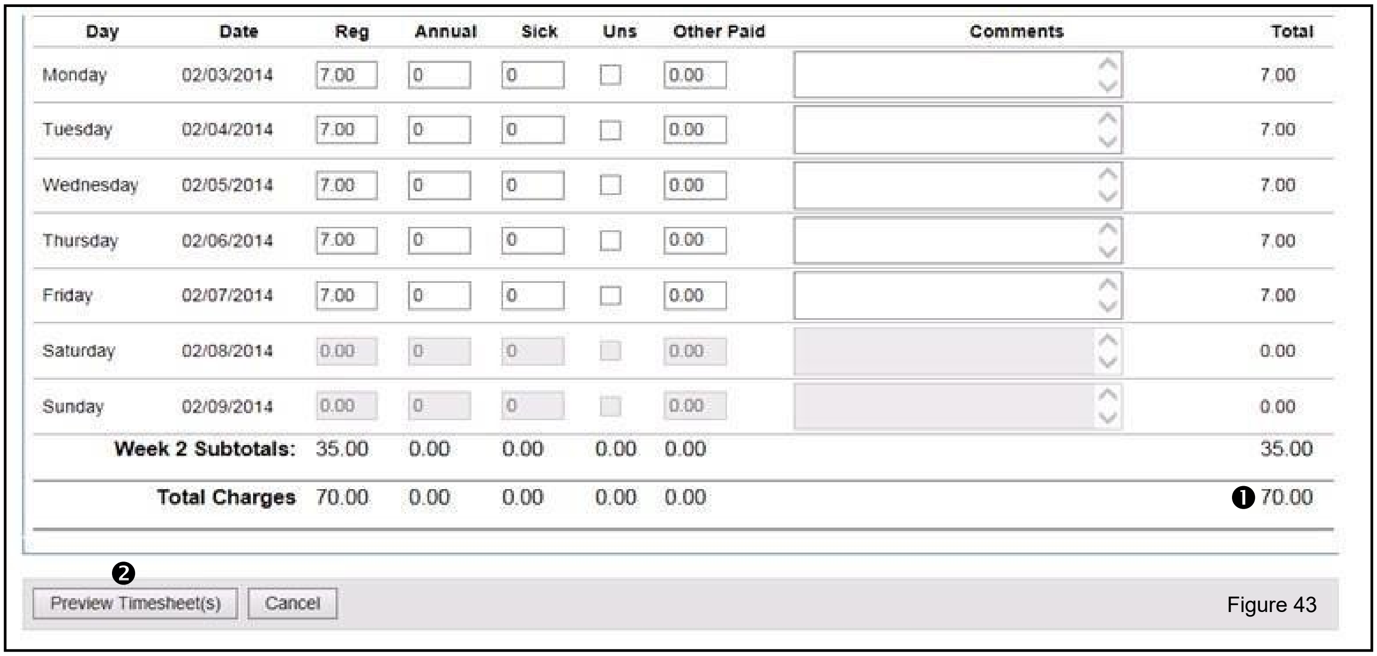
To view comments left by a Timekeeper or Employee, click the applicable link at the upper right, just below the **Timesheet Header information.**

To view the audit trail for this Timesheet click the **History** link.

To have a quick view of accrual balances, click the **Show/Hide Time and Leave** link.

To return to the main pay period calendar selection page, click on the **Select Period** link at the top of the page right under **Manage Timesheets**.

To the right of the comment box is a total column that denotes the total hours entered for the day. At the end of each week there is a weekly subtotal and at the end of the 2 weeks pay period is a **Total Charges** ❶ for the timesheet. If the employee is appointed to more than one appointment for the project, and therefore completes a timesheet for each appointment, these totals take into account hours from all timesheets for the period.



Day	Date	Reg	Annual	Sick	Uns	Other Paid	Comments	Total
Monday	02/03/2014	7.00	0	0	☐	0.00		7.00
Tuesday	02/04/2014	7.00	0	0	☐	0.00		7.00
Wednesday	02/05/2014	7.00	0	0	☐	0.00		7.00
Thursday	02/06/2014	7.00	0	0	☐	0.00		7.00
Friday	02/07/2014	7.00	0	0	☐	0.00		7.00
Saturday	02/08/2014	0.00	0	0	☐	0.00		0.00
Sunday	02/09/2014	0.00	0	0	☐	0.00		0.00
Week 2 Subtotals:		35.00	0.00	0.00	0.00	0.00		35.00
Total Charges		70.00	0.00	0.00	0.00	0.00		❶ 70.00

❷ Preview Timesheet(s) | Cancel

Figure 43

Once the PI has finished entering the timesheet, he or she clicks on the **Preview Timesheet(s)** ❷ button at the bottom of the page to proceed. If the employee is on multiple appointments, the timekeeper can choose to preview each timesheet separately by clicking on the **Preview Only This Timesheet** button. The totals displayed when **Preview Only This Timesheet** is selected, correspond only to the timesheet on display.

When a user clicks either of the **Preview** buttons, the timesheet is displayed for review.

Error messages, if any, will display at the top of the screen as shown in figure 18 on page 24. An error message prevents the timesheet from being submitted. Errors can occur when an employee exceeds the remaining work hours or when the encumbrance remaining is not sufficient to cover for the timesheet charges.

Warning messages, if any, will display in the status box at the top and bottom of the screen. If the PI/AA notes, at any time during the timesheet process, that time or encumbrance(s) are nearing an end earlier than expected, s/he should immediately amend the PAF to add additional funds to the appointment. (Please refer to the e-PAF User's Guide for a detailed description of the system.)

If the PI/AA does not agree with the displayed information, he or she can click **Edit** as shown in figure 16 on page 21 ❸ to change the information. In order to completely cancel a timesheet, click the **Void Only This Timesheet button**.

If the PI/AA agrees with the information in the timesheet, s/he clicks either the **Save** or **Save and Approve** button to conclude the process. While the Preview Timesheets functionality allowed the user to view all timesheet totals as one, each timesheet must be saved and submitted individually.

Clicking the **Save** button allows the PI/AA to make edits and additional entries to a timesheet at a later time. This will move the timesheet status to **Submitted**.

Clicking the **Save and Approve** button prevents the PI/AA, Timekeeper, and employee from making any further changes. Furthermore, the timekeeper will not be able to revoke a prior submission. This action will move the timesheet status to **Approved**. If changes need to be made after the timesheet is submitted, the PI/AA must revoke the timesheet's submission or contact the RF for assistance.

By approving the timesheet, the PI/AA is certifying the accuracy of the entries. Once the timesheet is submitted, the system will generate a **Notification** message ❶.

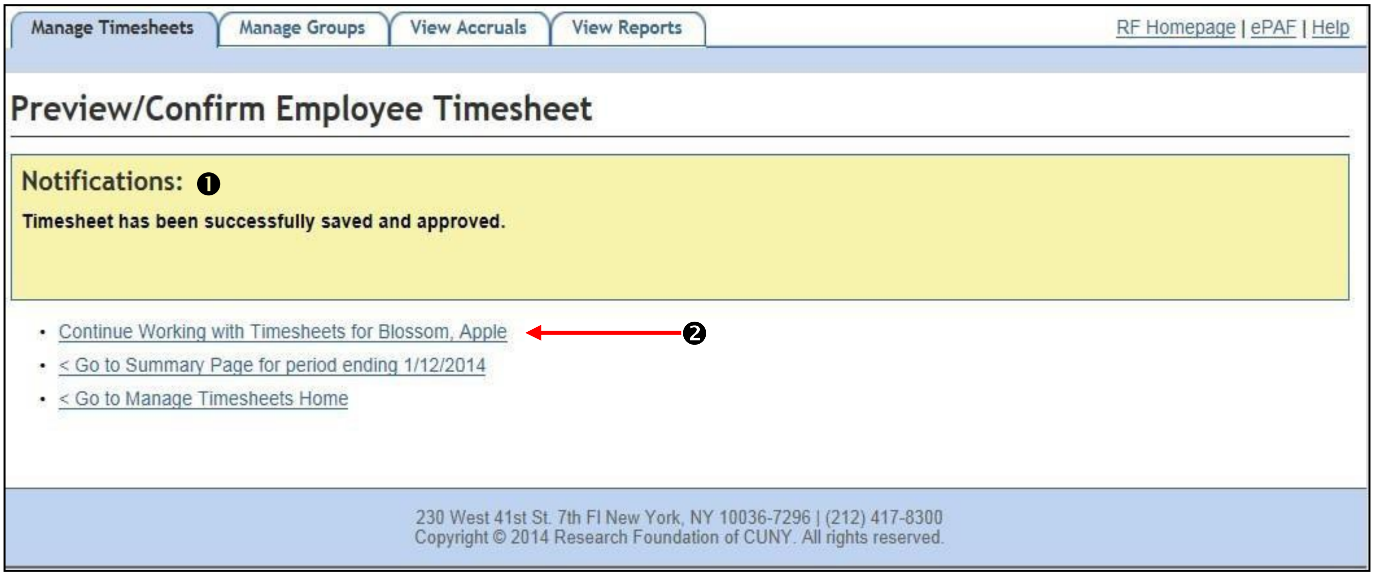


Figure 44

To make changes to a submitted timesheet, click on the **Continue Working with Timesheets for Employee Name** ❷. Then, click on **Revoke Submission** at the bottom of the timesheet page. Return to the Summary Page and Click **View Edit**. The timesheet is no longer submitted and has reverted back to the status of **Created**.

To make a change after a timesheet is approved, click on the **Continue Working with Timesheets for Employee Name**. Then, click on **Revoke Approval** at the bottom of the timesheet page. Return to the Summary Page and click **View Edit.** The timesheet is no longer approved and has reverted back to the status of submitted.

Alternative Timesheet Submission

An alternative method of timesheet approval is to use the summary page once the actual timesheet for each employee has been reviewed and saved.

To the left of each employee name are **Approve** ❶ and **Save** ❷ check boxes. For timesheets with a status of Submitted, the Save box is checked, as the timesheet was Submitted via the Save button in the View/Edit Timesheet screen.

To approve the timesheet, check the approved box and click the **Submit Selected** ❸ button.

Please Note: By submitting the timesheets, the PI/AA is certifying the accuracy of the entries. Therefore, it is important to review each individual timesheet thoroughly before submitting them.

Once a timesheet is Approved, it is ready for payroll. No further action by the Project's management is required. The PI/AA may log off or click the Manage Groups, View Accruals or View Reports tabs at the top of the page.

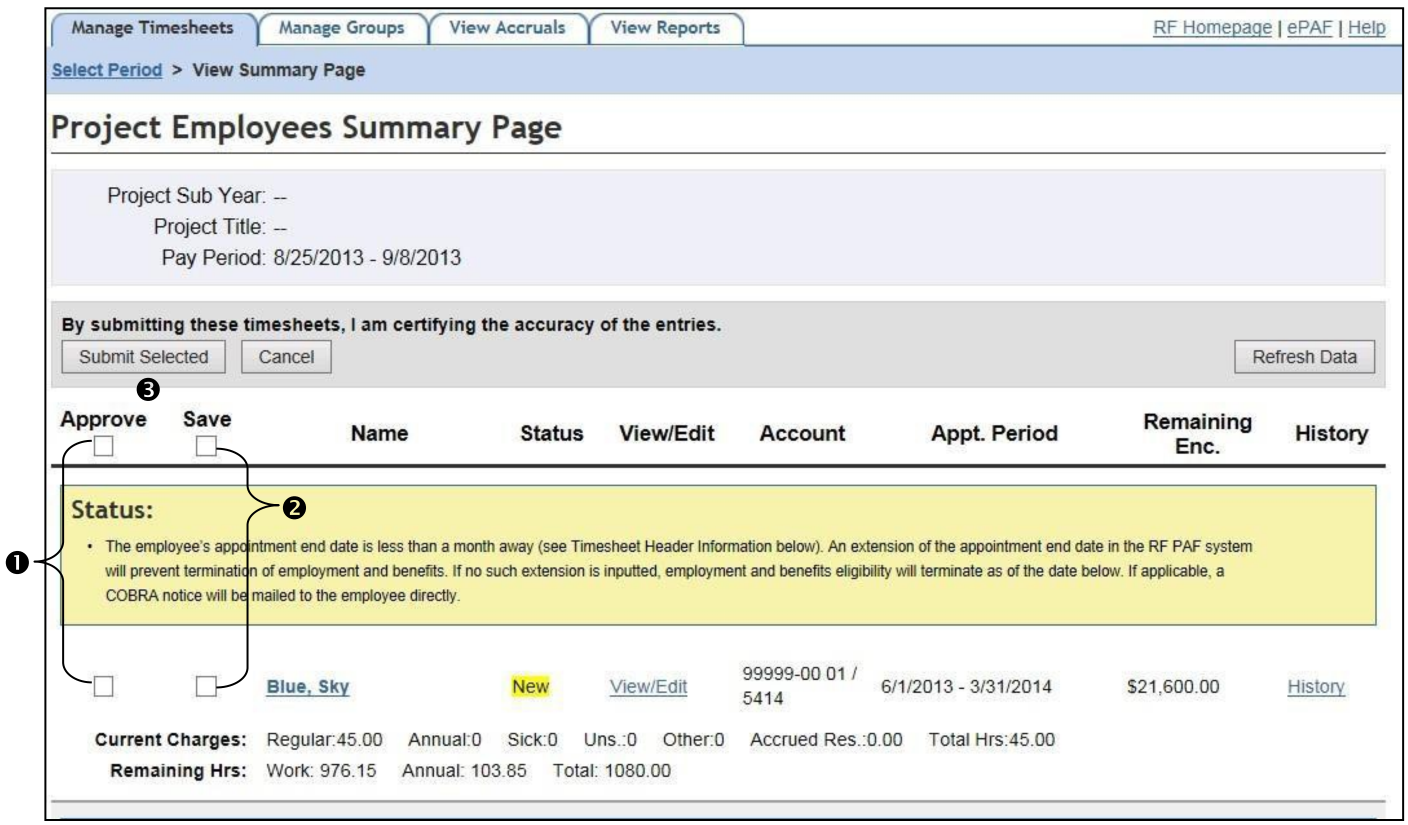


Figure 45

Manage Groups

The **Manage Groups** ❶ feature allows a PI to set up all or some of a project's employees into groups and assign a project employee or other person to act as a timekeeper for the employee's in the group.

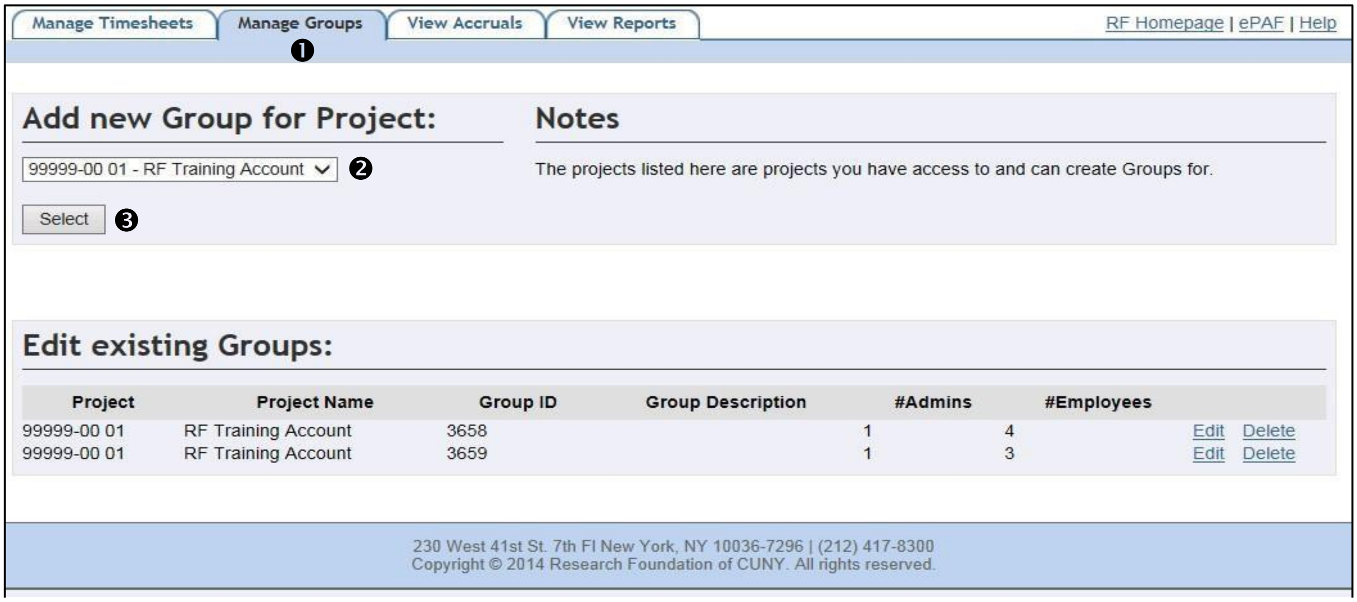


Figure 46

To create a new Group for Project, select the desired project from the drop-down menu ❷. Then click on Select ❸. You will be directed to the administrator and employee selection screen in figure 47 on page 53.

First, add a Description ❶ of the group in this section. Then select the timekeepers from among the available **Administrators or Timekeepers** list ❷. Listed there will be all the project's employees as well as any other non-appointed persons granted Timekeeper access to the project by the Web Access Security Team. (See the Timekeeper Option on page 18 for more information)

To assign a person to be a timekeeper, highlight the person's name and click the forward arrow. This will bring the person over to the top right box selected.

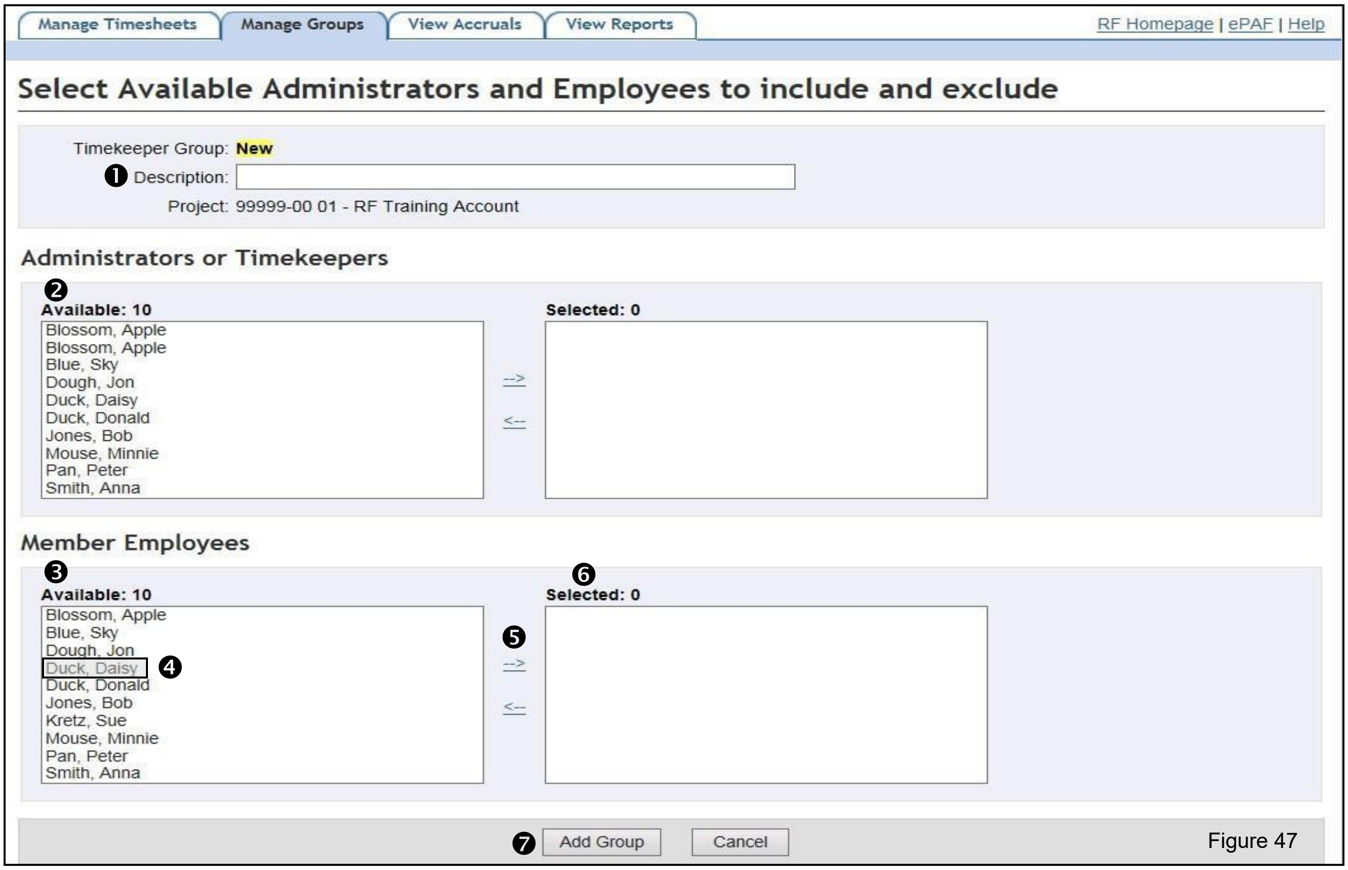


Figure 47

Please Note: If a person has a 3 digit code next to his or her name, he or she must use the code to access the RF website in order to perform Timekeeper responsibilities.

Next, select the group's employees from the **Member Employees Available** list ❸. The PI can opt to select only a few or all of the employees.

To assign an employee to be in a group, **highlight the person's name** ❹ and click the **forward arrow** ❺. That will bring the person over to the **Selected** box ❻.

If an employee is not assigned to a group, only the employee and PI/AA will be able to access his or her timesheet. A Timekeeper will not see the excluded employee's name in the Summary Page.

Click **Add Group** ❼ button to save the group. A message will appear confirming the action.

Existing Groups are listed by **Project ❶** number. The PI can edit a Group's Timekeepers or the assigned employees, or both. To edit a Group, click **Edit ❷**. To delete a Group, click **Delete ❸**. Once a Group is deleted, the Timekeeper will not be able to access the timesheets for that project unless a new Group is created.

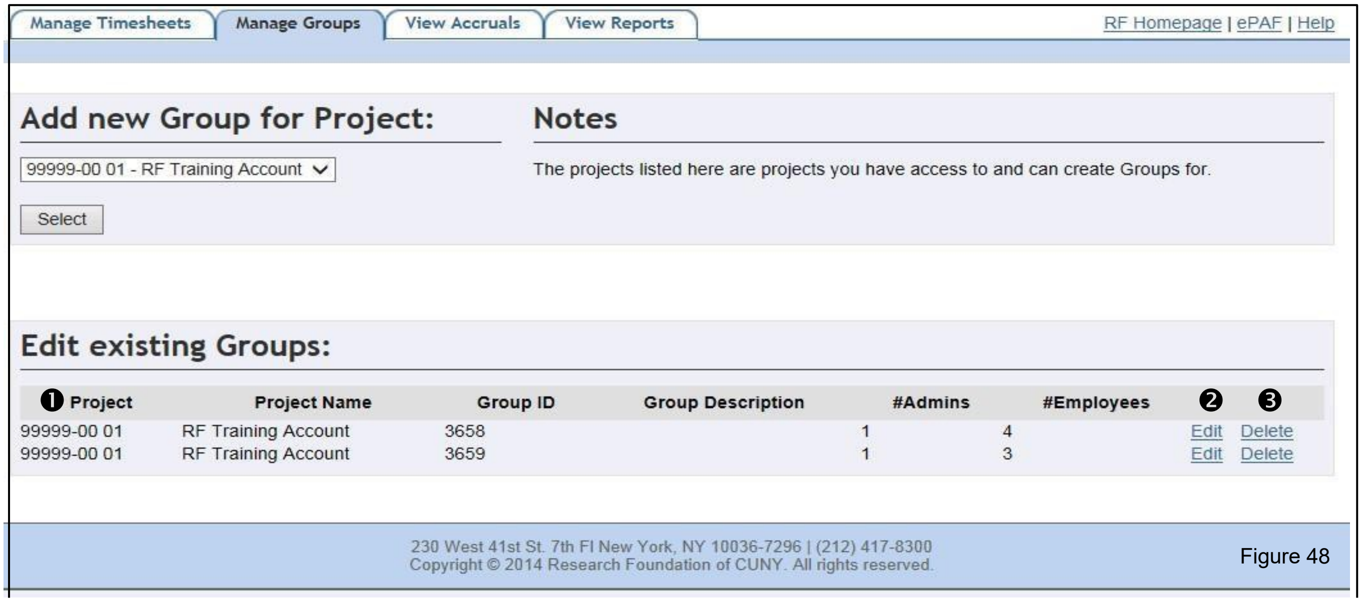


Figure 48

Once the desired changes are made, click the **Update Group ❹** button to save the changes.

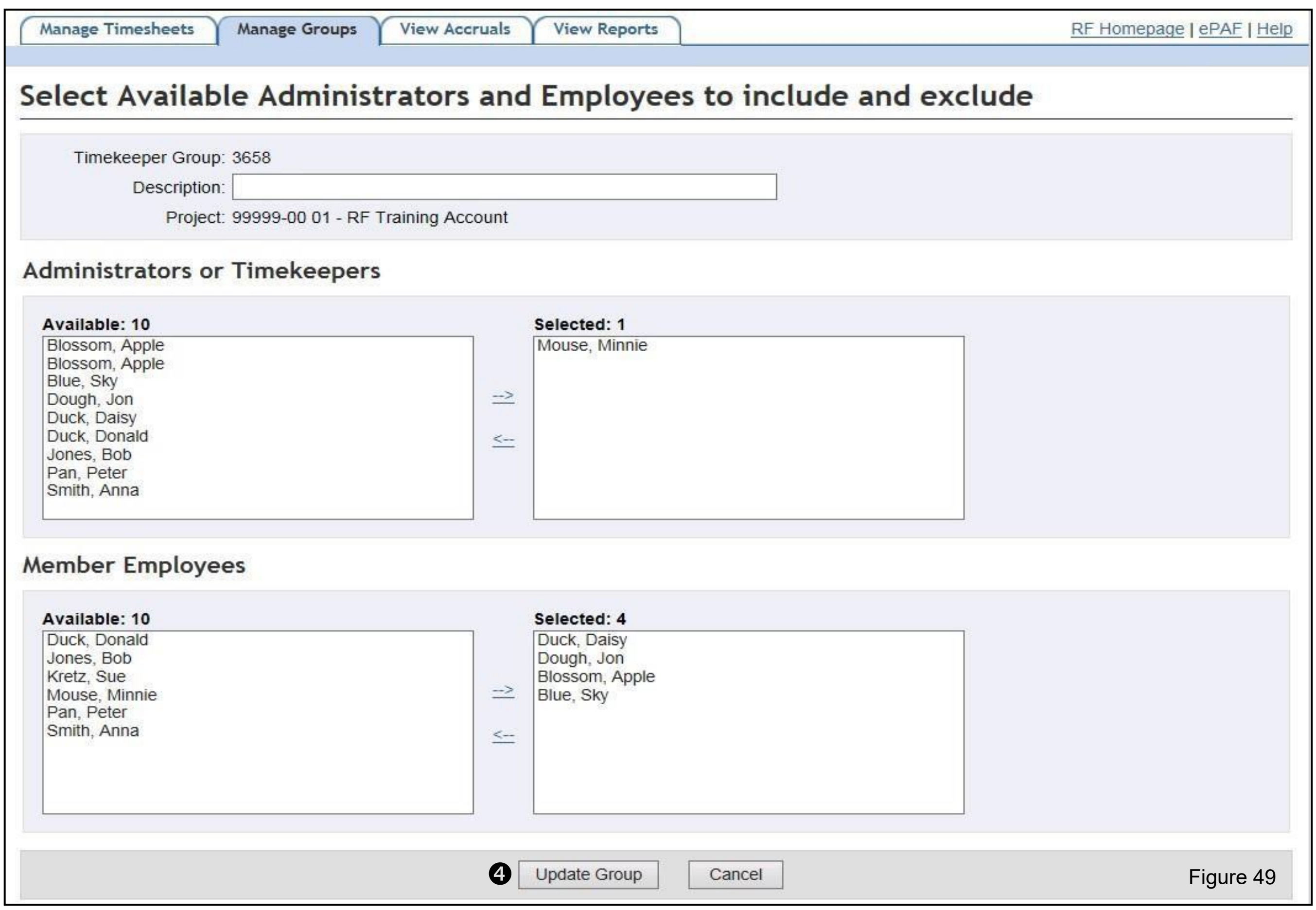


Figure 49

View Accruals

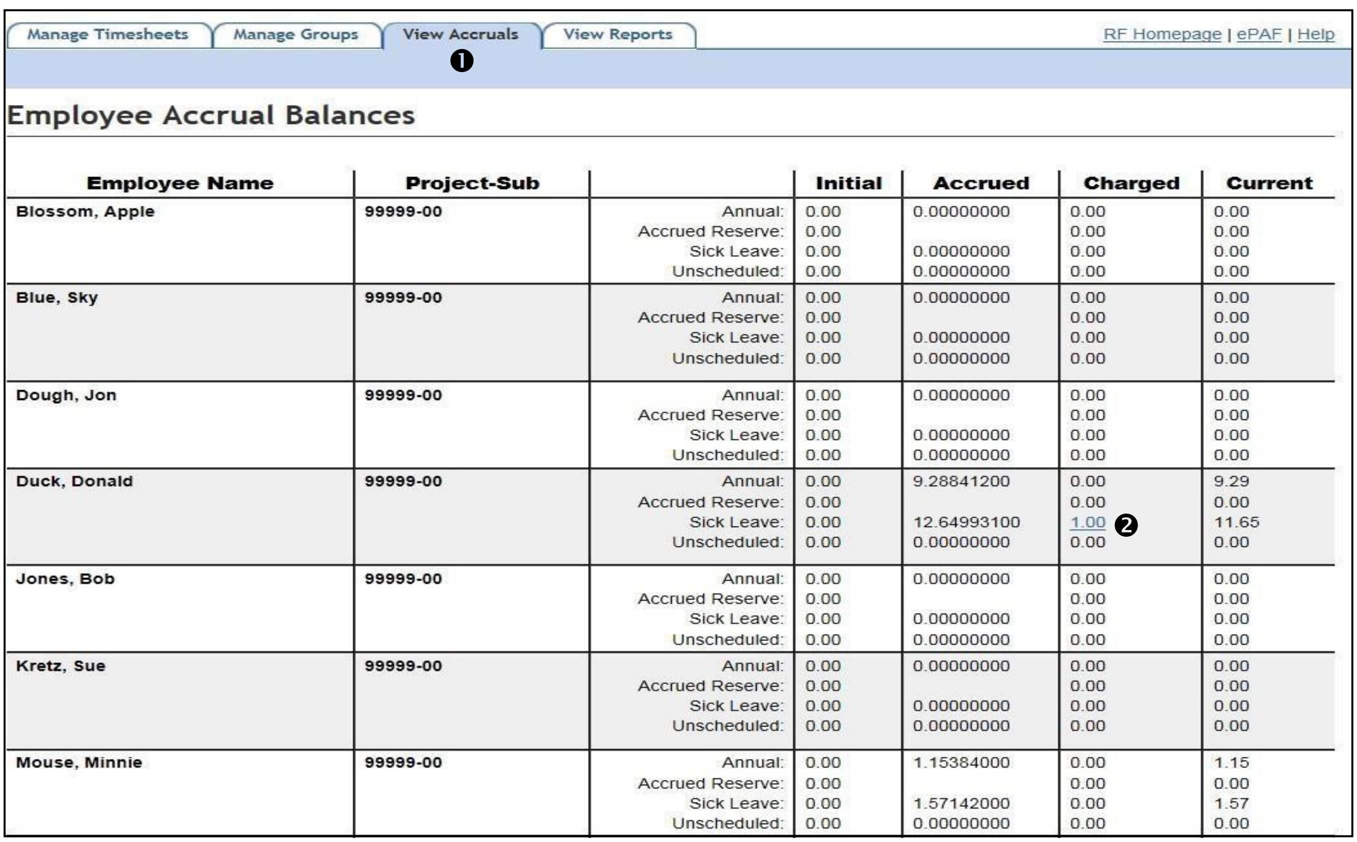
To view accruals for the employees assigned to a specific group, click the **View Accruals** ❶ tab at the top of the screen.

This is the Employee Accrual Balances screen.

Each employee assigned to the PI/AAs is listed in alphabetical order. To the right of the employee's name are the accrual balance grid that show the Annual, Accrued Reserve, Sick, and Unscheduled Holiday Leave earnings, Charged, and current available balances for all appointments on the same project. For employees that are appointed to different projects, separate accruals will be listed for each project.

Under the Charged column, the PI/AA can click on the **Hours** ❷ to see more information about the used accruals such as when and in which period the time was used.

Accruals are earned based upon the number of hours submitted in a timesheet for a specific project. (Please see the RF Time Off and Leave policy 506 for more information).



Employee Accrual Balances

Employee Name	Project-Sub		Initial	Accrued	Charged	Current
Blossom, Apple	99999-00	Annual:	0.00	0.00000000	0.00	0.00
		Accrued Reserve:	0.00		0.00	0.00
		Sick Leave:	0.00	0.00000000	0.00	0.00
		Unscheduled:	0.00	0.00000000	0.00	0.00
Blue, Sky	99999-00	Annual:	0.00	0.00000000	0.00	0.00
		Accrued Reserve:	0.00		0.00	0.00
		Sick Leave:	0.00	0.00000000	0.00	0.00
		Unscheduled:	0.00	0.00000000	0.00	0.00
Dough, Jon	99999-00	Annual:	0.00	0.00000000	0.00	0.00
		Accrued Reserve:	0.00		0.00	0.00
		Sick Leave:	0.00	0.00000000	0.00	0.00
		Unscheduled:	0.00	0.00000000	0.00	0.00
Duck, Donald	99999-00	Annual:	0.00	9.28841200	0.00	9.29
		Accrued Reserve:	0.00		0.00	0.00
		Sick Leave:	0.00	12.64993100	1.00 ❷	11.65
		Unscheduled:	0.00	0.00000000	0.00	0.00
Jones, Bob	99999-00	Annual:	0.00	0.00000000	0.00	0.00
		Accrued Reserve:	0.00		0.00	0.00
		Sick Leave:	0.00	0.00000000	0.00	0.00
		Unscheduled:	0.00	0.00000000	0.00	0.00
Kretz, Sue	99999-00	Annual:	0.00	0.00000000	0.00	0.00
		Accrued Reserve:	0.00		0.00	0.00
		Sick Leave:	0.00	0.00000000	0.00	0.00
		Unscheduled:	0.00	0.00000000	0.00	0.00
Mouse, Minnie	99999-00	Annual:	0.00	1.15384000	0.00	1.15
		Accrued Reserve:	0.00		0.00	0.00
		Sick Leave:	0.00	1.57142000	0.00	1.57
		Unscheduled:	0.00	0.00000000	0.00	0.00

Figure 50

View Reports

Click on the **View Reports ❶** tab at the top of the screen. Next, select the report you wish to generate.

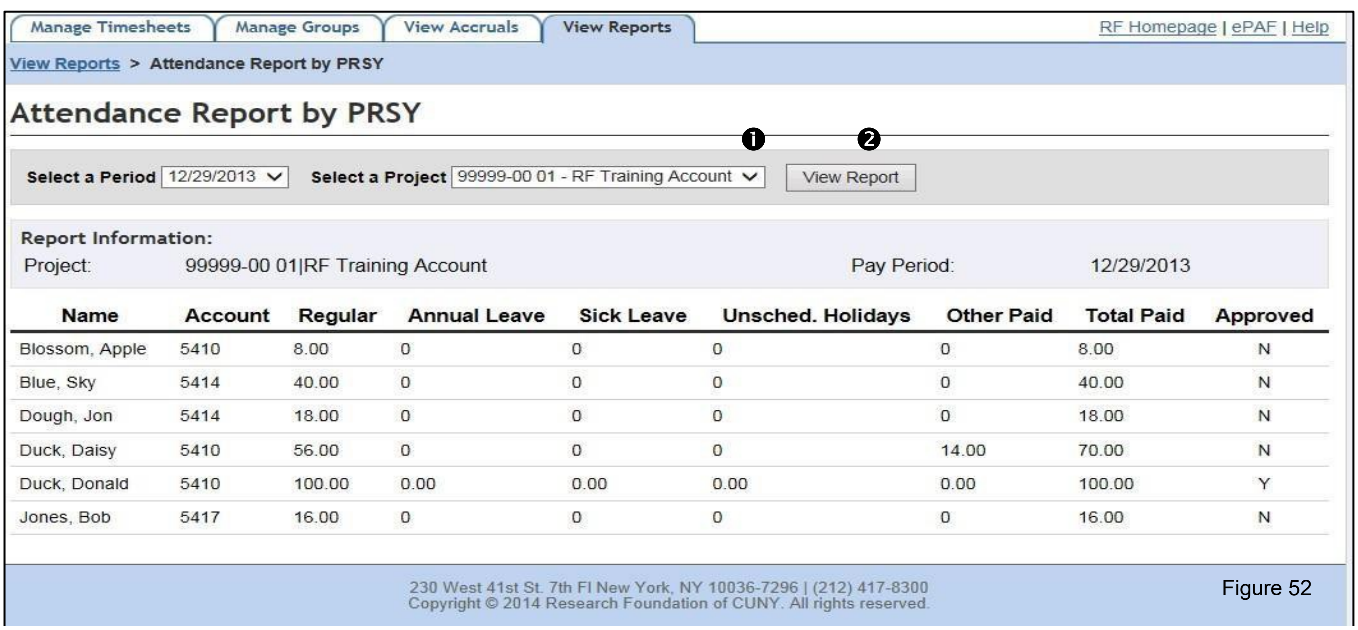
This feature allows the PI/AA to view **Attendance Report by PRSY ❷** and an **Annual Leave Projection by Project ❸**.

Figure 51

Attendance Report by PRSY

To generate the Attendance Report by PRSY, select the desired pay period the desired **Project** number ❶ in the drop-down menu. Then, click **View Report ❷** in figure 52.

The subsequent report is a list of timesheets entered and for the selected period. Report information includes the entered time in each of the timesheet's columns, the total amount of hours paid, and the status of the timesheet.



Name	Account	Regular	Annual Leave	Sick Leave	Unsched. Holidays	Other Paid	Total Paid	Approved
Blossom, Apple	5410	8.00	0	0	0	0	8.00	N
Blue, Sky	5414	40.00	0	0	0	0	40.00	N
Dough, Jon	5414	18.00	0	0	0	0	18.00	N
Duck, Daisy	5410	56.00	0	0	0	14.00	70.00	N
Duck, Donald	5410	100.00	0.00	0.00	0.00	0.00	100.00	Y
Jones, Bob	5417	16.00	0	0	0	0	16.00	N

Figure 52

Annual Leave Projection by Project Report

To generate the Annual Leave Projection by Project report, select the desired **Project** number ❶ in the drop-down menu. Then, click **View Report** ❷.

This report list the employee's on the project selected, their pay rate, annual leave accrual rate, current annual leave balance on the PRSY, a projection of annual leave hours to be earned by the end of the current appointment, and a total annual leave balance. The report information can be used to assist PIs in planning the use of accrued annual leave.

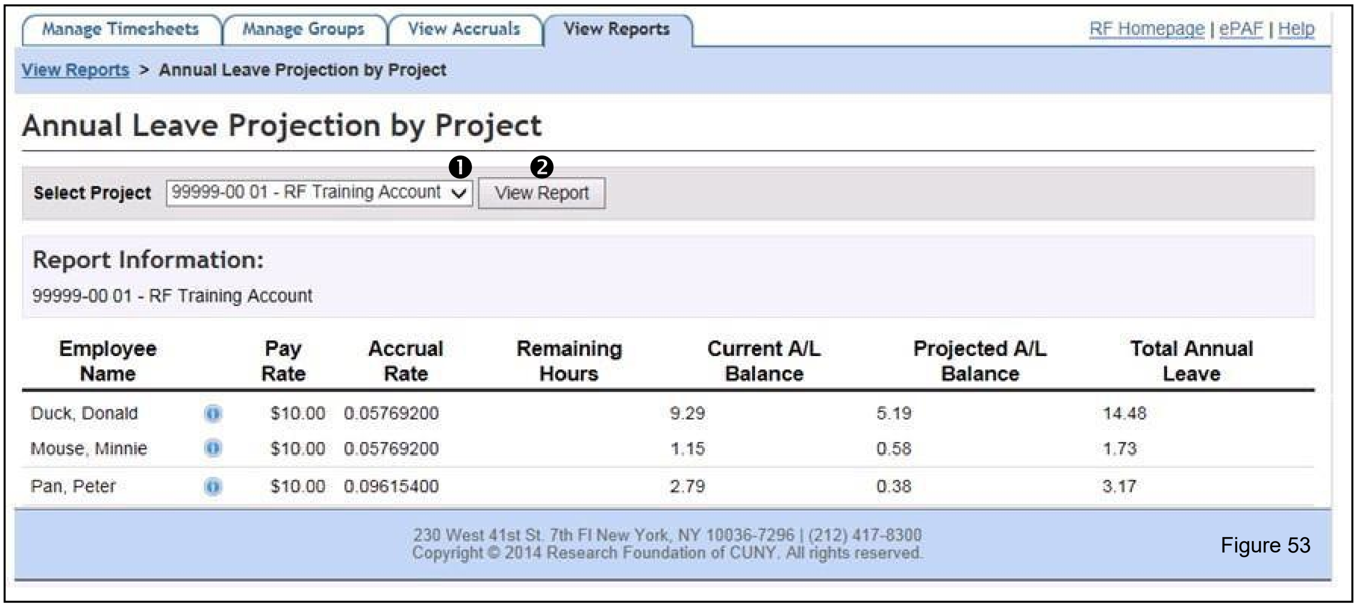


Figure 53

The Current A/L Balance is the available annual leave on the PRSY. The Projected A/L Balance is the annual leave the employee is expected to earn by the end of the current appointment. The Total Annual Leave, is the total annual leave liability per employee.

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Accrued Reserve (AR)

The Accrued Reserve (AR) is the total balance of employee's unused annual leave on an appointment that ended on, or prior to, 3/31/13, established on a project-sub by project-sub basis. The AR balance(s) is only available for future use during active employment if the employee is appointed on the project-sub on which it was accrued. Otherwise, the AR balances(s) will be paid out at termination.

Charging Accrued Reserve (AR)

When a timesheet is created, charging annual leave accrual, the Time and Leave system will evaluate whether the annual leave balance on the employee's current appointment can accommodate the time being charged, and perform one of the following actions:

- If the current appointment's existing balance can accommodate the time being charged, the Time and Leave system will allow the timesheet to be processed and submitted.
- If the current appointment's existing annual leave balance cannot accommodate the time being charged, the system will evaluate whether the appointment's existing, plus projected annual leave balance (based on the employee's current appointment end date & accrual rate) can accommodate the charge. If the charge can be accommodated, the timesheet will be processed. The employee's projected annual leave will be used and a negative charge will appear on the employee's Annual Leave balance.
- If the appointment's existing and projected annual leave balances cannot accommodate the charge, the Time and Leave system will check whether enough AR is available (based on the employee's current pay rate) to accommodate the charge. If the AR balance can accommodate the charge, the timesheet will go through, then the employee's AR will be decremented at his/her current hourly rate. If there isn't sufficient AR to accommodate the charges, the system will generate and error message and will not allow the timesheet to be submitted.

When AR is charged, the system generates a **notification** ❶ letting the employee know that Accrued Reserve hours were used.

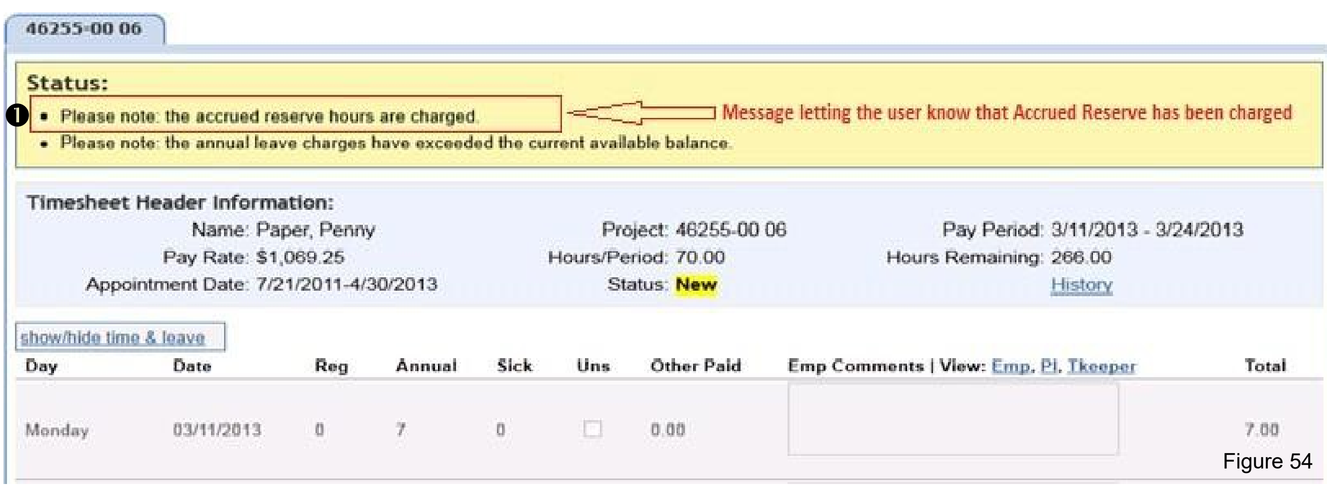

Figure 54

In addition, an **Information** icon ❶ will appear next to the hours charged to let the user know that Accrued Reserve (AR) hours have been used. Clicking on the Information icon (in the red box) will display the number of AR hours charged. The employee's AR balance will be decremented as the hours are charged.

Day	Date	Reg	Annual	Sick	Uns	Other Paid	Comments	Total
Monday	03/18/2013	0	7 ❶	0	☐	0.00		7.00
Tuesday	03/19/2013	0	7	0	☐	0.00		7.00
Wednesday	03/20/2013	0	7	0	☐	0.00		7.00
Thursday	03/21/2013	0	7	0	☐	0.00		7.00
Friday	03/22/2013	0	7	0	☐	0.00		7.00
Saturday	03/23/2013	0.00	0	0	☐	0.00		0.00
Sunday	03/24/2013	0.00	0	0	☐	0.00		0.00
	Week 2 Subtotals:	0.00	35.00	0.00	0.00	0.00		35.00
	Total Charges	0.00	70.00	0.00	0.00	0.00		70.00

Information icon letting the user know that AR hours are being used.

Figure 55

If the employee does not have sufficient current Annual Leave, Projected Annual Leave, and the AR balance is not equal or greater than the amount needed to cover the amount of time being charged on the timesheet, the system will generate an **error message ❶** and the user will not be able to submit the timesheet.

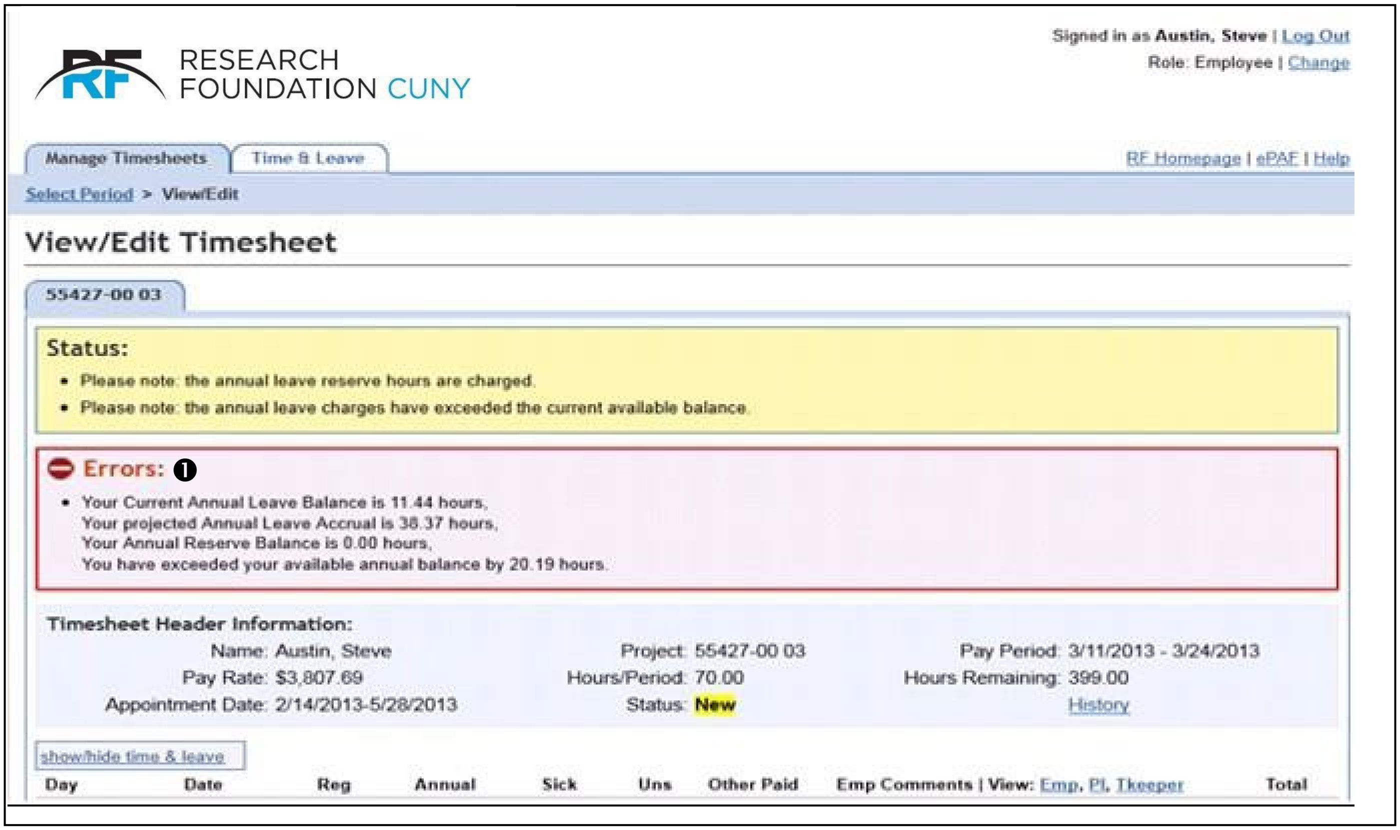

Figure 56

RESEARCH FOUNDATION CUNY

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