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</tr>
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<td>52</td>
</tr>
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</tr>
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<td>55-57</td>
</tr>
</tbody>
</table>
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 in to the RF website, go to www.rfcuny.org. The User Sign In area is located to the left of the screen;

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. # and password. Select the timekeeper role when prompted.

Or

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)


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 212-417-8415.

Employees – Please contact your Human Resources Payroll Coordinator at 212-417-8600.

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

Once signed in, click on Time and Leave (Payroll Administration) under the Electronic Tools menu. This will bring you to the Time and Leave cover page.
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 (3) roles are:

**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.

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.

**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 212-417-8415.

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 212-417-8415.
How to Navigate the Time and Leave System

This is the Time and Leave system cover page:

On the left is the payroll calendar. A blue highlighted day indicates a pay period end date where the user clicks 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’ 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 and e-PAF system are located at the top right of the screen.

Also located at the top right is the Change 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 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 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 employee selects a pay period and enters or views a timesheet.

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

Manage Timesheets

To create or view timesheets:

The employee must choose the appropriate pay period. To select a pay period, click the pay period end 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 (as tabs) are all the projects that the employee is currently appointed to and which cover the selected pay period. Each tab represents a separate timesheet.
Understanding the Timesheet Header

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

<table>
<thead>
<tr>
<th>Timesheet Status: New</th>
<th>History</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee: Duck, Daisy</td>
<td>Project: 99999-00 01</td>
</tr>
<tr>
<td>Pay Rate: $2,500.00</td>
<td>Pay Period: 12/16/2013 - 12/29/2013</td>
</tr>
<tr>
<td>Hours/Period: 70.00</td>
<td>Appt Period: 12/16/2013-12/31/2014</td>
</tr>
<tr>
<td>Remaining Work Hours: 1800.75</td>
<td>Remaining Annual Hours: 110.25</td>
</tr>
<tr>
<td>Remaining Total Hours: 1911.00</td>
<td></td>
</tr>
</tbody>
</table>

Beginning at the top left and reading across is the

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 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. See the PI section of this manual for further instructions
- **Uploaded** - This status indicates that the timesheet has been processed and payroll has been generated by the RF.
- **Manual** – This status indicates that a paper timesheet and manual paycheck have already been generated for this pay period for the specific appointment line.

Employee: This is the employee’s Name and the 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/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, unscheduled holidays 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) since the last payroll.

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 eTimesheet system will generate a pop-up message (see below), indicating that work hours are soon coming to an end and advises the employee to schedule annual leave.
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.

<table>
<thead>
<tr>
<th>Day</th>
<th>Date</th>
<th>Reg</th>
<th>Annual</th>
<th>Sick</th>
<th>Uns</th>
<th>Other Paid</th>
<th>Pi Comments</th>
<th>View</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>01/27/2014</td>
<td>7.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7.00</td>
</tr>
<tr>
<td>Tuesday</td>
<td>01/28/2014</td>
<td>7.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7.00</td>
</tr>
<tr>
<td>Wednesday</td>
<td>01/29/2014</td>
<td>7.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7.00</td>
</tr>
<tr>
<td>Thursday</td>
<td>01/30/2014</td>
<td>7.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7.00</td>
</tr>
<tr>
<td>Friday</td>
<td>01/31/2014</td>
<td>7.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7.00</td>
</tr>
<tr>
<td>Saturday</td>
<td>02/01/2014</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
</tr>
<tr>
<td>Sunday</td>
<td>02/02/2014</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
</tr>
</tbody>
</table>

Week 1 Subtotals: 35.00 0.00 0.00 0.00 0.00

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 40 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 the 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. 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 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 (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.

**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)’ button at the bottom of the page to proceed.

<table>
<thead>
<tr>
<th>Day</th>
<th>Date</th>
<th>Reg</th>
<th>Annual</th>
<th>Sick</th>
<th>Uns</th>
<th>Other Paid</th>
<th>Comments</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>12/23/2013</td>
<td>7.00</td>
<td>0</td>
<td>0</td>
<td></td>
<td>0.00</td>
<td></td>
<td>7.00</td>
</tr>
<tr>
<td>Tuesday</td>
<td>12/24/2013</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
<td>7.00</td>
<td>Holiday</td>
<td>7.00</td>
</tr>
<tr>
<td>Wednesday</td>
<td>12/25/2013</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
<td>7.00</td>
<td>Holiday</td>
<td>7.00</td>
</tr>
<tr>
<td>Thursday</td>
<td>12/26/2013</td>
<td>7.00</td>
<td>0</td>
<td>0</td>
<td></td>
<td>0.00</td>
<td></td>
<td>7.00</td>
</tr>
<tr>
<td>Friday</td>
<td>12/27/2013</td>
<td>7.00</td>
<td>0</td>
<td>0</td>
<td></td>
<td>0.00</td>
<td></td>
<td>7.00</td>
</tr>
<tr>
<td>Saturday</td>
<td>12/28/2013</td>
<td>0.00</td>
<td>0</td>
<td>0</td>
<td></td>
<td>0.00</td>
<td></td>
<td>0.00</td>
</tr>
<tr>
<td>Sunday</td>
<td>12/29/2013</td>
<td>0.00</td>
<td>0</td>
<td>0</td>
<td></td>
<td>0.00</td>
<td></td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Week 2 Subtotals:**

<table>
<thead>
<tr>
<th></th>
<th>Reg</th>
<th>Annual</th>
<th>Sick</th>
<th>Uns</th>
<th>Other Paid</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>21.0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>14.00</td>
<td>35.00</td>
</tr>
</tbody>
</table>

**Total Charges**

<table>
<thead>
<tr>
<th></th>
<th>Reg</th>
<th>Annual</th>
<th>Sick</th>
<th>Uns</th>
<th>Other Paid</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>56.0</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>14.00</td>
<td>70.00</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Week 1 Subtotals:</th>
<th>35.00</th>
<th>0.00</th>
<th>0.00</th>
<th>0.00</th>
<th>0.00</th>
<th>35.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Monday</td>
<td>12/23/2013</td>
<td>7.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>7.00</td>
</tr>
<tr>
<td>Tuesday</td>
<td>12/24/2013</td>
<td>0.00</td>
<td>6.00</td>
<td>0.00</td>
<td>0.00</td>
<td>6.00</td>
</tr>
<tr>
<td>Wednesday</td>
<td>12/25/2013</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>7.00</td>
<td>7.00</td>
</tr>
<tr>
<td>Thursday</td>
<td>12/26/2013</td>
<td>7.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>7.00</td>
</tr>
<tr>
<td>Friday</td>
<td>12/27/2013</td>
<td>7.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>7.00</td>
</tr>
<tr>
<td>Saturday</td>
<td>12/28/2013</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Sunday</td>
<td>12/29/2013</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Week 2 Subtotals:</td>
<td>21.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>14.00</td>
<td>35.00</td>
</tr>
<tr>
<td>Total Charges</td>
<td>55.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>55.00</td>
</tr>
</tbody>
</table>

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 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. The totals will then only correspond to the one 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. 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 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.

If the employee agrees with the information in the timesheet, s/he clicks either the ‘Save’ or ‘Save and Submit’ button 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, he or she can click ‘Edit’ to change the information. In order to completely cancel a timesheet, click the ‘Void Only This Timesheet’ button.

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

**Accrual Balance and Work Schedule**

Employees’ Accrual Balances and Work Schedule are in separate sub tabs under the Time & Leave Main tab.

**Time & Leave Accrual Screen**

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

![Image of Time & Leave/Accrual Screen]

To view the employee’s Accrual, click the ‘Time and Leave’ tab at the very top of the screen and then click on the Accrual sub tab (circled in red above). The Accrual sub tab will display the employee’s Accrual information. The Accrual sub tab displays the employee’s Current, Charged, Accrued time, and the Initial 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’ column, the employee can click on the hours to see more information about the used accruals such as when and in which pay period the time was used.

**Work Schedule**

The screen below shows the Employee Profile and Work Schedule.

To view the employee’s Work Schedule, click the ‘Time and Leave’ tab at the very top of the screen and then click on the Work Schedule sub tab (circled in red above). Clicking the Work Schedule sub tab will display the employee’s Work Schedule profile - which includes the appointment’s information and predefined work schedule. An employee can choose which of their appointments to view by selecting a project from the “Drop-down” list of ‘Active Projects.

The schedule area displays the employee’s pre-defined schedule as inputted by the employee's Project Director or Principle 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.

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 # and password and when prompted, choose ‘Timekeeper’ as the role.

The PI can use the ‘Groups’ feature (See description in the PI section) 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 212-417-8415. 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) - This feature is where the timekeeper selects a pay period and enters or views a timesheet.

View Accruals – This feature allows the timekeeper to view the leave accrual balances for all employees assigned to him or her.

View Reports – This is where the Timekeeper can view timesheet reports for a selected period and view the PRSY’s annual leave liability report.

To Create/Edit Bi-Weekly Timesheets

Please Select a Period

<table>
<thead>
<tr>
<th>May 2014</th>
<th>View Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sun</td>
<td>Mon</td>
</tr>
<tr>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>11</td>
<td>12</td>
</tr>
</tbody>
</table>

PAF's Due
Timesheets Due

Pay Day
Manage Timesheets

Timekeepers have 2 methods of timesheet management:

Biweekly Timesheet: This method is used to enter and submit the timesheet for the entire pay period.

Daily Allocation: This method is used to enter and save entries for a particular day of the timesheet.

To select an entry method, click on the link at the top of the page.
**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 end date. Next, the Timekeeper selects a group for which entries are desired and clicks ‘Continue’ to proceed.

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.

This is the Employee Timesheet Summary page. The employees in the selected group are listed alphabetically. At the top of the page is the Group number, Group description, and selected pay period.
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:

- **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 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. See the PI section of this manual for further instructions.
  - **Uploaded** - This status indicates that the timesheet has been processed and payroll has been generated by the RF.
  - **Manual** - This status indicates that a paper timesheet and manual paycheck have already been generated for this pay period for the specific appointment line.
- **View/Edit**: Click on this field to access the actual timesheet.
- **PRS/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 ‘Reg’ular 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.

**Note**: These numbers does 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’.
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 select a different ‘Group’, click ‘Select Group’ 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.

```
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 select a different ‘Group’, click ‘Select Group’ 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.

```

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.

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 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. See the PI section of this manual for further instructions.  
Uploaded - This status indicates that the timesheet has been processed and payroll has been generated by the RF.  
Manual – This status indicates that a paper timesheet and manual paycheck have already been generated for this pay period for the specific appointment line.  
• Employee: This is the employee’s name and the 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/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.  

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 eTimesheet system will generate a pop-up message (see below), indicating that work hours are soon coming to an end and advises the employee to schedule annual leave.

![Work Hour Limit Approaching](image_url)
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.

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 40 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. **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.
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 ‘Reg’ular 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 ‘Reg’ular 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 grand total 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.

Once the Timekeeper has finished entering the timesheet, he or she clicks on the ‘Preview Timesheet(s)’ 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. 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 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.

If the Timekeeper does not agree with the displayed information, he or she can click ‘Edit’ to change the information. In order to completely cancel a timesheet, click the ‘Void Only This Timesheet’ button.

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 notification message, see below.

To make changes to a ‘Submitted’ timesheet, click on the ‘Continue Working with Timesheets for Employee Name’. 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’.

To the left of each employee name are ‘Submit’ and ‘Save’ check boxes. For ‘Created’ timesheets, the ‘Save’ box is checked, as the timesheet was ‘Created’ via the ‘Save’ button in the View/Edit Timesheet screen.

To submit the timesheet, Check the ‘Submit’ box and Click the ‘Submit Selected’ button at the top or bottom of the page.

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’ or ‘View Reports’ 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’ link under the Manage Timesheets tab, see highlighted area below.
Once the ‘Daily Allocation’ feature is selected, a calendar appears that allows the timekeeper to select a specific day.

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

Once a date has been selected, the next screen appears, asking the timekeeper to select the group 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.

Select the appropriate group from the drop down menu and click ‘Continue’.

*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 work, Annual leave, Sick leave, and/or Other Paid Leave on the summary page by typing the number into the appropriate fields.

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). The employee should charge annual leave.

Status 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’ under the Comment column. A small 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. To view comments left by others, click on the link ‘Timekeeper’, ‘PI’ or ‘Employee’ in the comment box.

To save the daily entries, select the timesheet by checking the white box to the left of the employee’s name then click the ‘Save Selected’ button at the top of the summary page.
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’ link in the Activity column of the summary page.

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.

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 the timesheet to the PI, at period end, the Timekeeper must access the ‘Biweekly Timesheet’. Click on the link ‘View Bi-Weekly Timesheet’ in the upper right hand corner of the Daily Timesheet page.

To make changes to a ‘Submitted’ timesheet: Click on the link ‘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’ tab at the top of the screen. Next, the Timekeeper must select a group of employees and click the ‘View Accruals’ button.

What follows is the Employee Accrual Balances screen. Each employee assigned to the selected group 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, charges, and current available balances for all appointments on the same project.

Under the ‘Charged’ column, the Timekeeper can click on the hours 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.)
**View Reports**

This feature allows the Timekeeper to view Attendance reports and an Annual Leave Projection by Project Report.

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

![Attendance Report by PRSY](image)

**Attendance Report by PRSY**

To generate the Attendance Report, select the desired pay period and the desired Project number. Then, click ‘View Report’.

![Attendance Report by PRSY](image)

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.

![Attendance Report by PRSY](image)
Annual Leave Projection by Project Report

To generate the Annual Leave Projection Report, select the project number. Then click ‘View Report’.

This report lists 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.
The PI/Authorized Approver Option

This option is for the Project PI or an Authorized Approver (a PI 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 212-417-8415.

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 the page.
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:

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.
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/AA’s 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.

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

- **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** - This status indicates that a paper timesheet and manual paycheck have already been generated for this pay period for the specific appointment line.
- **View/Edit**: Click on this field to access the actual timesheet.
- **PRS/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 ‘Reg’ular 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.

**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’ will bring the PI/AA to the Employee’s Profile 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.

To change the predefined schedule, the PI/AA enters the new schedule’s hours for each week and clicks ‘Save’. To switch from Regular to Summer hours (or vice versa), select the Active Button 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.

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 ‘Reg’ular 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.

![Timesheet Screen](image)

#### Status:
- The employee’s appointment end date is less than a month away (see Timesheet Header Information below). An extension of the appointment end date in the RF PAF system will prevent termination of employment and benefits. If no such extension is inputted, employment and benefits eligibility will terminate as of the date below. If applicable, a COBRA notice will be mailed to the employee directly.

#### Timesheet Status:
- **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. The PI or Authorized Approver may still edit the timesheet.
- **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 paper timesheet and manual paycheck have already been generated for this pay period for the 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) since the last payroll.

**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 eTimesheet system will generate a pop-up message (see below), indicating that work hours are soon coming to an end and advises the employee to schedule annual leave.

![Work Hour Limit Approaching](image)

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.
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 40 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. 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.

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 'Reg’ular 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 ‘Reg’ular 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 week pay period is a grand total 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.

<table>
<thead>
<tr>
<th>Day</th>
<th>Date</th>
<th>Reg</th>
<th>Annual</th>
<th>Sick</th>
<th>Uns</th>
<th>Other Paid</th>
<th>Comments</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>02/03/2014</td>
<td>7.00</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00</td>
<td></td>
<td>7.00</td>
</tr>
<tr>
<td>Tuesday</td>
<td>02/04/2014</td>
<td>7.00</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00</td>
<td></td>
<td>7.00</td>
</tr>
<tr>
<td>Wednesday</td>
<td>02/05/2014</td>
<td>7.00</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00</td>
<td></td>
<td>7.00</td>
</tr>
<tr>
<td>Thursday</td>
<td>02/06/2014</td>
<td>7.00</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00</td>
<td></td>
<td>7.00</td>
</tr>
<tr>
<td>Friday</td>
<td>02/07/2014</td>
<td>7.00</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00</td>
<td></td>
<td>7.00</td>
</tr>
<tr>
<td>Saturday</td>
<td>02/08/2014</td>
<td>0.00</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00</td>
<td></td>
<td>0.00</td>
</tr>
<tr>
<td>Sunday</td>
<td>02/09/2014</td>
<td>0.00</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00</td>
<td></td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Week 2 Subtotal**: 35.00  0.00  0.00  0.00  0.00  35.00  
**Total Charges**: 70.00  0.00  0.00  0.00  0.00  70.00

Once the PI has finished entering the timesheet, he or she clicks on the ‘Preview Timesheet(s)’ 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. 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’ 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, see below.

To make changes to a ‘Submitted’ timesheet, click on the ‘Continue Working with Timesheets for Employee Name’. 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’ and ‘Save’ 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 ‘Approve’ box and Click the ‘Submit Selected’ button at the top or bottom of the page.

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.
Manage Groups

The ‘Manage Groups’ 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.

To create a new Group, select the desired project. You will be directed to the administrator and employee selection screen, see below:

To create a new Group, select the desired project. You will be directed to the administrator and employee selection screen, see below:
First, select the timekeepers from among the Available people in the top left box. 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 for more information.)

To assign a person to be a timekeeper, highlight the person’s name and click the forward arrow. That will bring the person over to the top right box – Selected.

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 Available list in the bottom left box. 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 and click the forward arrow. That will bring the person over to the bottom right box – Selected.

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’ button to save the Group. A message will appear confirming the action.

Existing Groups are listed by Project #. The PI can edit a Group’s Timekeepers or the assigned employees, or both. To edit a Group, Click ‘Edit’ at the right.
Once the desired changes are made, click the ‘Update Group’ button to save the changes.

To delete a Group, click Delete at the right. Once a Group is deleted, the Timekeeper will not be able to access the timesheets for that project unless a new Group is created.
View Accruals

To view accruals for the employees assigned to a specific group, Click the ‘View Accruals’ tab at the top of the screen.

This is the Employee Accrual Balances screen.

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Project-Sub</th>
<th>Initial</th>
<th>Accrued</th>
<th>Charged</th>
<th>Current</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blossom, Apple</td>
<td>99999-00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Blue, Sky</td>
<td>99999-00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Dough, Jon</td>
<td>99999-00</td>
<td>0.00</td>
<td>9.25841200</td>
<td>0.00</td>
<td>9.29</td>
</tr>
<tr>
<td>Duck, Donald</td>
<td>99999-00</td>
<td>0.00</td>
<td>12.94993100</td>
<td>1.00</td>
<td>11.65</td>
</tr>
<tr>
<td>Jones, Bob</td>
<td>99999-00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Kretz, Sue</td>
<td>99999-00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Mouse, Minnie</td>
<td>99999-00</td>
<td>0.00</td>
<td>1.15894000</td>
<td>0.00</td>
<td>1.15</td>
</tr>
</tbody>
</table>
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, charges, 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 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.)

**View Reports**

This feature allows the PI/AA to view Attendance reports and an Annual Leave Projection by Project Report.

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

**Attendance Report by PRSY**

To generate the Attendance Report, select the desired pay period the desired Project number. Then, click ‘View Report’.

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.
Annual Leave Projection by Project Report

To generate the Annual Leave Projection Report, select the project number. Then click ‘View Report’.

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.

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.
**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 letting the employee know that Accrued Reserve hours were used.
In addition, an information icon 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 will display the number of AR hours charged. The employee’s AR balance will be decremented as the hours are charged.

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 and the user will not be able to submit the timesheet.
View/Edit Timesheet

Status:
- Please note: the annual leave reserve hours are charged.
- Please note: the annual leave charges have exceeded the current available balance.

Errors:
- Your Current Annual Leave Balance is 11.44 hours,
  Your projected Annual Leave Accrual is 38.37 hours,
  Your Annual Reserve Balance is 0.00 hours,
  You have exceeded your available annual balance by 20.19 hours.

Timesheet Header Information:
- Name: Austin, Steve
- Pay Rate: $3,807.69
- Project: 55427-00 03
- Hours/Period: 70.00
- Hours Remaining: 399.00
- Appointment Date: 2/14/2013-5/28/2013
- Status: New
CONTACT INFORMATION:

Patrice Osbahr - Assistant Director of Human Resources - Payroll Administration  
Phone: (212) 417-8670  
E-mail: patrice_osbahr@rfcuny.org

Antoinette Morizio - Payroll Manager  
Phone: (212) 417-8640  
E-mail: antoinette_morizio@rfcuny.org

Schools: CUNY Central, Lehman, S&C Guttman, Medgar Evers  
Deborah Sacco - Sr. Campus Payroll Coordinator  
Phone: (212) 417-8641  
E-mail: deborah_sacco@rfcuny.org

Schools: Hunter, CUNY Law, CUNY SPH, Queens  
Benedict Scoon - Sr. Campus Payroll Coordinator  
Phone: (212) 417-8644  
E-mail: benedict_scoon@rfcuny.org

Schools: City College, Staten Island, Brooklyn, BMCC  
Jesse Felix - Campus Payroll Coordinator  
Phone: (212) 417-8642  
E-mail: jesse_felix@rfcuny.org

Schools: NYCCT, Baruch, KBCC, LaGuardia, Queensborough  
Bianca Reyes-Garcia - Campus Payroll Coordinator  
Phone: (212) 417-8643  
E-mail: bianca_reyes-garcia@rfcuny.org

Schools: Graduate, John Jay, Bronx, Journalism, Hostos, York, CUNY ASRC  
Jane Kim - Campus Payroll Coordinator  
Phone: (212) 417-8646  
E-mail: jane_kim@rfcuny.org