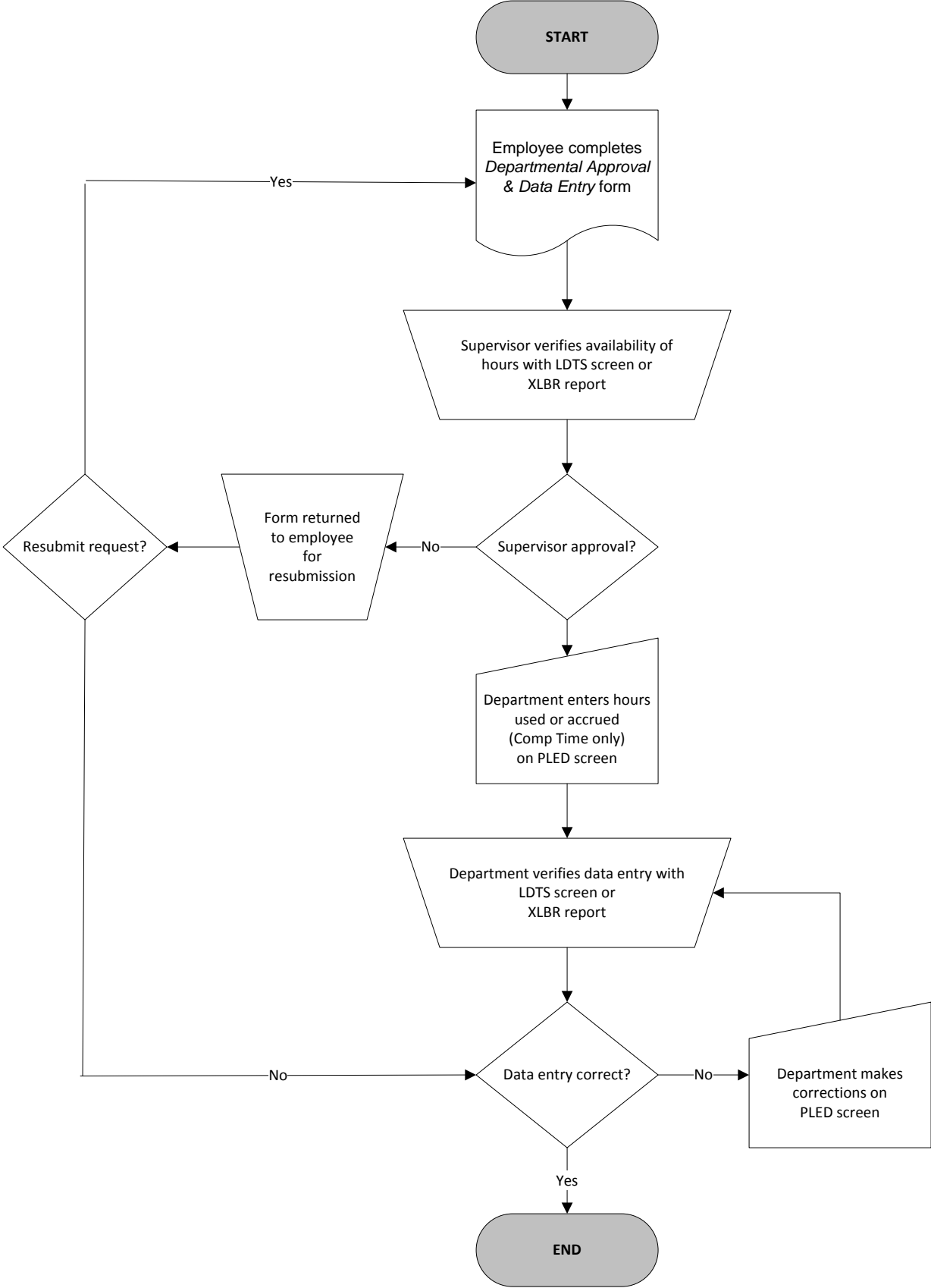


EMPLOYEE LEAVE TRACKING
Procedure Manual



EMPLOYEE LEAVE TRACKING FLOWCHART



EMPLOYEE LEAVE TRACKING

Breakdown of Responsibilities

RESPONSIBILITY OF DEPARTMENT

- Ensure that the employee requesting time off has an adequate balance in his/her leave bank(s).
- Enter in Colleague:
 - Hours Used: Vacation, Sick & Emergency, Personal Business, Compensatory Time, Occurrence Time (PSO only) and Miscellaneous Absence leave banks
 - Hours Earned: Compensatory Time leave bank only
 - Adjustments: Vacation, Sick & Emergency, Personal Business, Compensatory Time, Occurrence Time (PSO only) and Miscellaneous Absence leave banks
- Provide leave balance information to employees upon request.
- Notify Susan Praski (x20503) in Human Resources if an employee is absent for more than five (5) consecutive working days (except Vacation). Human Resources needs this information to begin tracking absences to determine eligibility for other benefits (e.g: FMLA, Long-Term Disability, Worker's Comp, etc).

RESPONSIBILITY OF HUMAN RESOURCES

- Post monthly and annual accruals for Vacation, Sick & Emergency, and Personal Business.
- Transfer donated sick time if applicable.
- Pay in lieu of vacation.
- Open, close and change leave banks.
- Run periodic audits to ensure data accuracy.

LOGGING IN

1. Double click on the Datatel icon
2. LOGIN prompt: Type your User ID (the first letter of your first name and first seven letters of your last name) <ENTER>
3. PASSWORD prompt: Type your password <ENTER>
4. **MOTT COMMUNITY COLLEGE MAIN MENU:** Select *Colleague Live Account* <ENTER>
5. **COLLIVE MAIN MENU:** Select *Human Resources* <ENTER>
6. **HUMAN RESOURCES MENU:** Select *Personnel (PE)* <ENTER>
7. **PERSONNEL MENU:** Select the appropriate mnemonic for the sub-menu or screen you wish to access.

LOGGING OUT

1. From any menu, type **LO** <ENTER>
2. **MOTT COMMUNITY COLLEGE MAIN MENU:** Select **Exit** <ENTER>
3. If "*Connection Closed from Host*" appears, click **Close**
4. Close the Colleague window by clicking the **X** at the top right
5. You may receive this message: "*One or more Scripts are running. These must be stopped before you exit. Stop the Scripts?*" Click **Yes**

ACCESSING EMPLOYEES

At the screen level, "*HR Person Lookup*" will appear at the bottom of the screen. Access employee data by using one of the following methods:

1. Enter the employee SSN or Datatel ID <ENTER>
 - If a privacy code message appears, press <ENTER> again
2. Enter all or part of the employee name <ENTER>
 - Select the appropriate employee from the list provided on the *Resolution* screen by typing the number <ENTER>
 - If a privacy code message appears, press <ENTER> again
3. If you wish to look at the last employee accessed, type @ <ENTER>
 - If a privacy code message appears, press <ENTER> again

MISCELLANEOUS FUNCTIONS

1. To **PRINT** a screen, click on the printer icon on the tool bar (the fifth icon from the left)
2. To **ENLARGE** the size of the window, press the large "A" icon with the up arrow (the 6th icon from the left). To **REDUCE** the size of the window, press the small "A" icon with the down arrow (the 7th icon from the left).
3. To change your **PASSWORD**, select "Change UNIX Password" at the *MOTT COMMUNITY COLLEGE MAIN MENU* and follow the prompts. (Your password must be 6-8 characters, including at least one numeric.)

USING THE FUNCTION KEYS

The function keys are the F1 through F12 keys located at the top of your keyboard. A list of these keys as well as a description of their respective function is provided below:

KEY	FUNCTION	DESCRIPTION
F1	Field Help	Displays a one-line help message (press twice for more information)
Shift F1	Process Help	Displays a general overview of the process
F2	Detail	Displays Detail screen - only accessible if field is marked with asterisk*
Shift F2	Function Help	Lists function keys and task performed by each
F3	Window Jump	Jumps to specified window entry (enter window number)
Shift F3	Window Insert	Inserts a window entry just before the current line
F4	Field Jump	Jumps to specified field
Shift F4	Window Page Jump	Jumps to specified window page (enter page number)
F5	Window Forward	Advances cursor to the next window group
Shift F5	Window Back	Moves cursor forward to previous window group
F6	Field Forward	Moves cursor forward to the next field
Shift F6	Field Back	Moves cursor back to previous field
F7	Element Forward	Advances cursor to the next window element (individual data item)
Shift F7	Element Back	Moves cursor to previous window element
F8	Direct Access	Invokes another process without returning to Menu screen (mnemonic)
Shift F8	Cancel	Cancels changes made to current record
F9	Finish	Exits from current Menu or Process screen
Shift F9	Exit	Returns you to the Main Menu screen (still need to log out of system)
F10	Update	Saves current record, clears the screen, and asks for new record key

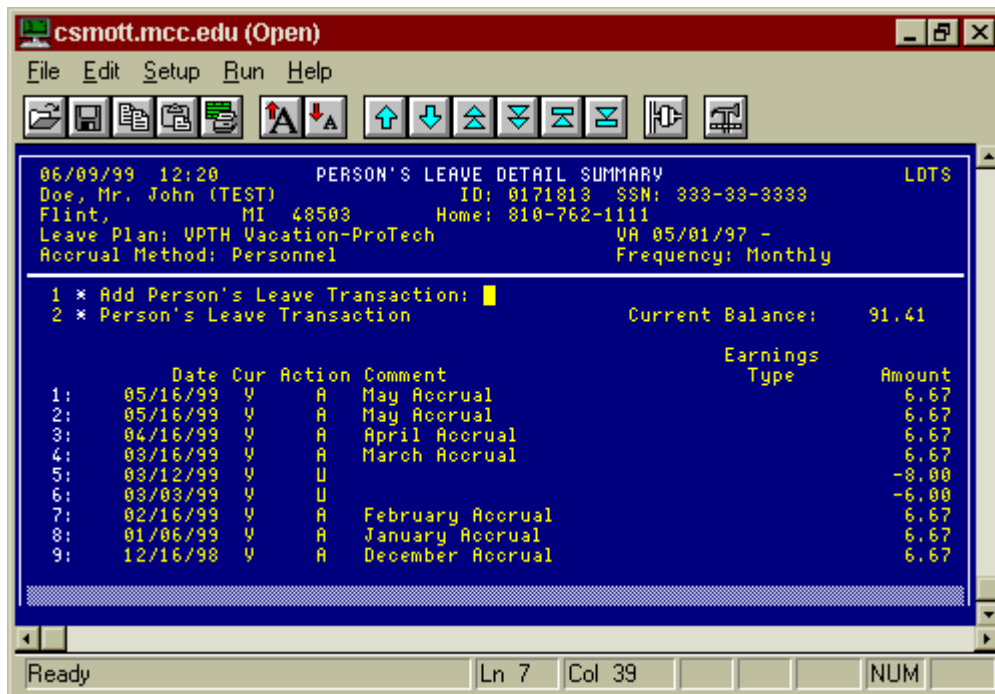
EMPLOYEE LEAVE TRACKING

Accessing the Leave Detail Screen

1. At the **LDTS** (*Person's Leave Detail Summary*) screen, select an employee by typing either a SSN or Datatel ID at the HR PERSON LOOKUP prompt. and <ENTER>. (Press <ENTER> again if the following message appears: "Person . . . has privacy code of E").
2. Select the leave plan you would like to update by:
 - a) Typing the leave plan code at the PERSON LEAVE LOOKUP prompt. <ENTER>
 - b) Typing . . . (three periods) at the PERSON LEAVE LOOKUP prompt <ENTER> (to select from a list of leave plans in which that employee is enrolled), then the Sequence Number preceding the leave plan. <ENTER>

The **LDTS** screen (FIGURE 1 below) shows the history detail, as well as the current balance for the selected leave plan. All transactions are entered by detailing into the **PLED** (*Person's Leave Detail*) screen. **NOTE: Do not enter transactions before they occur. Once a transaction is posted, it cannot be deleted or changed and can only be "corrected" by making an adjusting entry.** (See "Entering Adjustments" section.)

FIGURE 1



EMPLOYEE LEAVE TRACKING

Entering "Time Used" Transactions

1. From Line 1 of the **LDTs** screen, press <F2> to detail to the **PLED** screen (*Person's Leave Detail*).
2. Before entering transactions reflecting hours taken for Vacation, Sick & Emergency, Personal Business or Comp Time, check the "*Balance before Transaction*" at the bottom of the screen, or the "*Leave Balance Report*" to be sure the employee has enough hours to cover this transaction. (See FIGURE 2 below.)

Employees may not carry negative balances in any leave plan except Miscellaneous Absences (MISC), nor may they use time not yet accrued.

FIGURE 2

```
06/09/99 12:25 PERSON'S LEAVE DETAIL PLED
Doe, Mr. John (TEST) ID: 0171813 SSN: 333-33-3333
Flint, MI 48503 Home: 810-762-1111
Leave Plan: VPTH Vacation-ProTech VA 05/01/97 -
Accrual Method: Personnel Frequency: Monthly

1 Transaction Date.....:
2 Action.....:
3 Comment.....:
4 Earnings Type.....:
5 Transaction Amount.....:

Transaction Add Date.....:
Balance before Transaction: 91.41
Balance after Transaction:.
```

3. **TRANSACTION DATE:** Date the hours were used (mmddyy format). <ENTER>
4. **ACTION:** U for "Use Leave". <ENTER> (Or press F1 key twice to see code choices.)
5. **COMMENT:** Leave this field blank except when entering time used in the Miscellaneous Absences (MISC) leave plan. (Required codes for Miscellaneous Absences are shown on the "*Departmental Approval and Data Entry Form*".) <ENTER>
6. **EARNINGS TYPE:** Leave this field blank. <ENTER>
7. **TRANSACTION AMOUNT:** Number of hours used. (This number must be entered as a negative amount.) <ENTER> twice

EMPLOYEE LEAVE TRACKING

Entering "Time Used" Transactions (Cont'd)

FIGURE 3

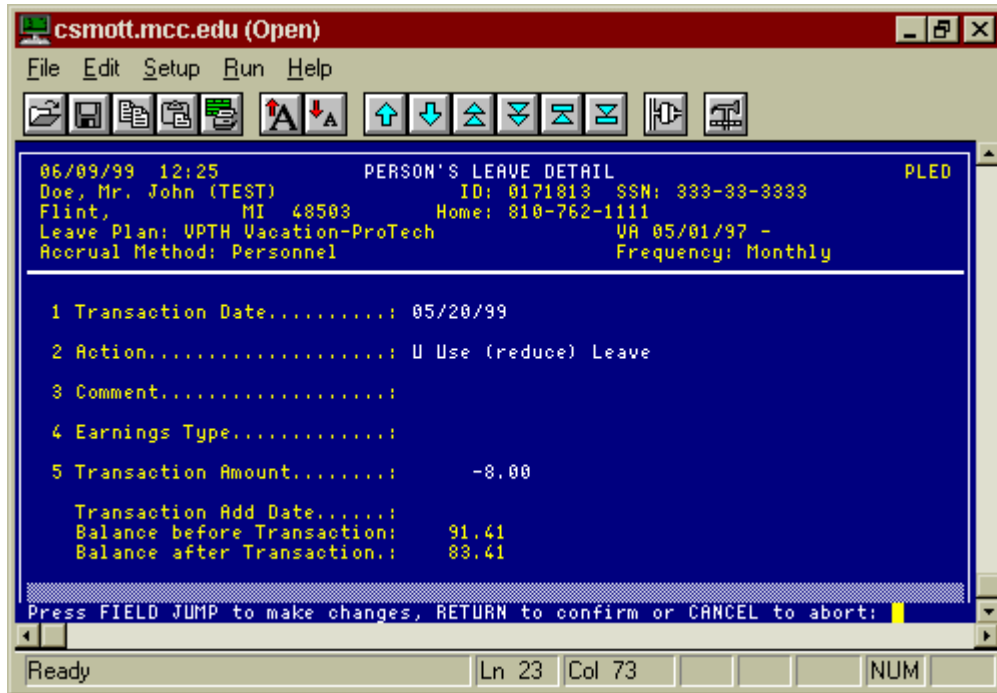


FIGURE 3 (above) shows the correct way to enter a transaction reflecting time used. When entering time used, the "Balance after Transaction" should be less than the "Balance before Transaction". (If the information entered is incorrect, press <F4> to make corrections, or <Shift F8> to cancel.) If the information has been entered correctly, press <ENTER> twice to update.

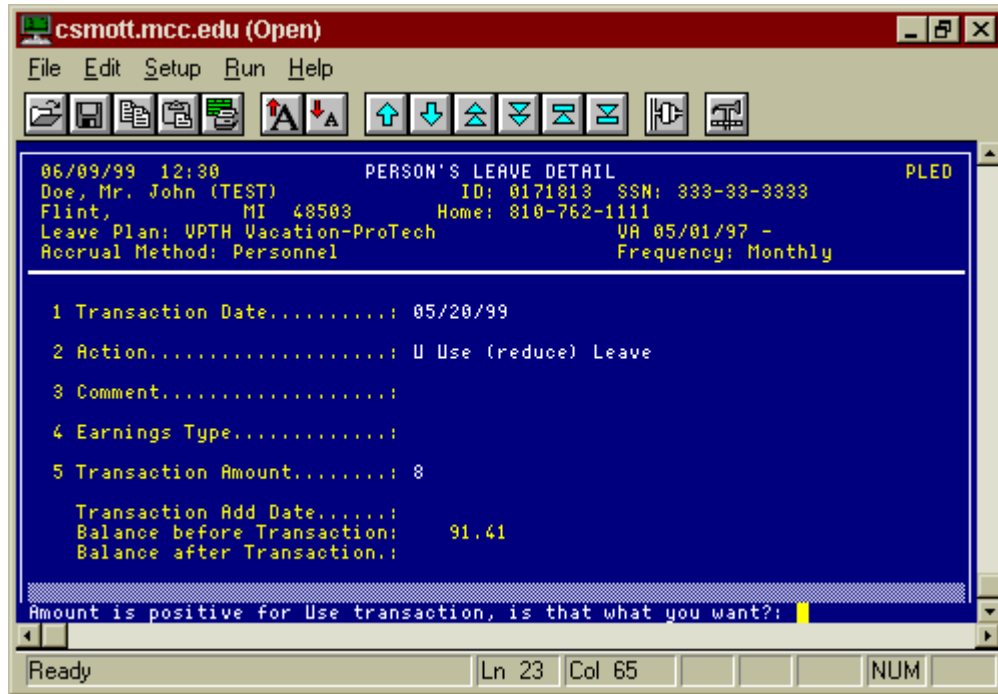
You will be returned to the **LDTS** screen, and the transaction will appear in the detail. To enter additional transactions in the same leave plan for the same employee, repeat the process beginning at Step 1. To enter a transaction for a different employee, or for the same employee but different leave plan, press <F10> and <ENTER> to complete the transaction and clear the screen. Repeat the process, beginning at Step 1 of "Accessing the Leave Detail Screen".

NOTE: If you enter a transaction with an ACTION code of "U" (Used) and incorrectly enter the TRANSACTION AMOUNT as a positive number, a message will appear at the bottom of the screen asking you to verify that you want to enter a positive rather than negative amount. (See FIGURE 4 on next page). Type "N" for "No", press <ENTER>, and make your corrections.

EMPLOYEE LEAVE TRACKING

Entering "Time Used" Transactions (Cont'd)

FIGURE 4



EMPLOYEE LEAVE TRACKING

Entering "Comp Time Earned" Transactions

1. **TRANSACTION DATE:** Date the hours were earned (mmdyy format). <ENTER>
2. **ACTION:** A for "Accrue Leave". <ENTER> (Or press F1 key twice to see code choices.)
3. **COMMENT:** Leave this field blank. <ENTER>
4. **EARNINGS TYPE:** Leave this field blank. <ENTER>
5. **TRANSACTION AMOUNT:** Entered at time and one-half for those eligible for comp time. (This number must be entered as a positive amount.) <ENTER> twice.

NOTE: In the example below, John Doe worked two (2) extra hours. You must enter "3" because this represents payment of the two hours at time and a half ($2 \times 1.5 = 3$).

FIGURE 5

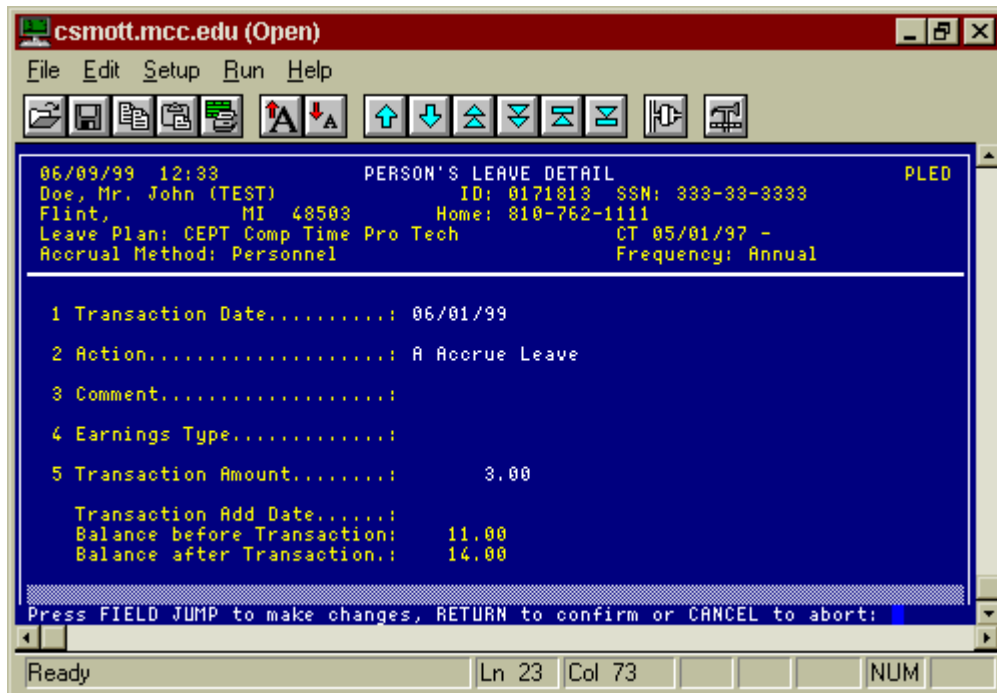


FIGURE 5 (above) shows the correct way to enter a transaction reflecting Comp Time earned. The "Balance after Transaction" should be greater than the "Balance before Transaction". (If the information entered is incorrect, press <F4> to make corrections or <Shift F8> to cancel.) If the information was entered correctly, press <ENTER> twice to update.

You will be returned to the **LDTS** screen, and the transaction will appear in the detail. To enter additional transactions in the same leave plan for the same employee, repeat the process beginning at Step 1. To enter a transaction for a different employee, or for the same employee but different leave plan, press <F10> and <ENTER> to complete the transaction and clear the screen.

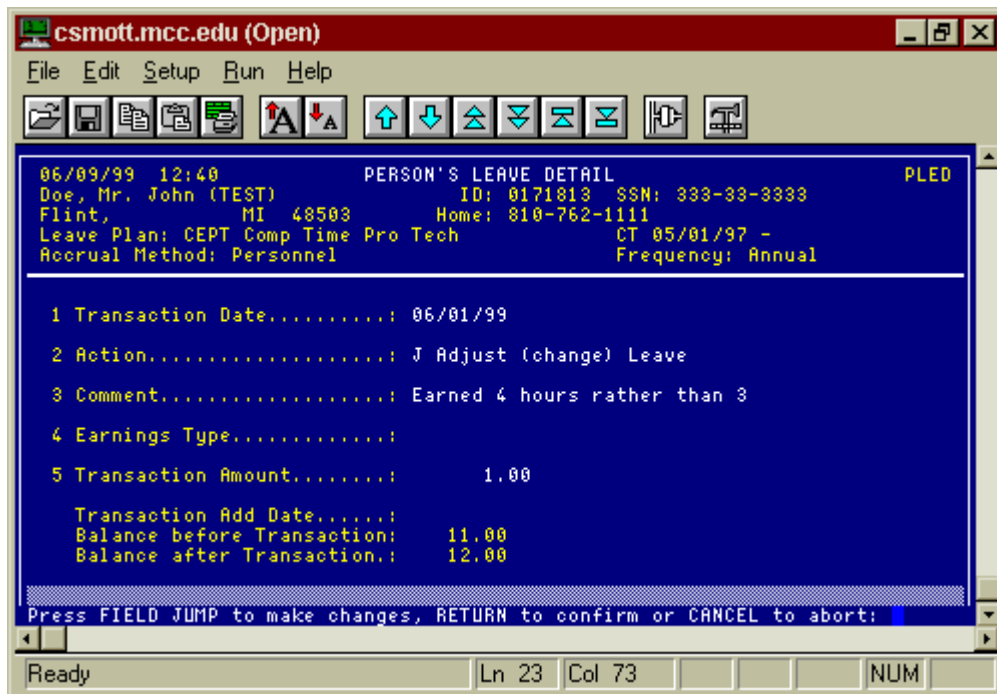
EMPLOYEE LEAVE TRACKING

Entering Adjustments

A transaction cannot be changed or deleted if it has been updated (saved). Another transaction record must be created to adjust the leave balance: (See FIGURE 6 below.)

1. **TRANSACTION DATE:** Same date as the original transaction (mmddy format). <ENTER>
2. **ACTION:** J for "Adjust Leave". <ENTER> (Or press F1 key twice to see code choices.)
3. **COMMENT:** Reason/explanation for the adjustment. <ENTER>
4. **EARNINGS TYPE:** Leave this field blank. <ENTER>
5. **TRANSACTION AMOUNT:** Number of hours to be corrected. (This number can be either a positive or a negative amount.) <ENTER> twice

FIGURE 6



LEAVE DETAIL REPORT (XLDR)

1. From the LEAVE REPORTS MENU, type XLDR.
2. If you want to print specific employees, type the letter **P** <ENTER>. To print all employees in the department, type the letter **D** <ENTER>.
3. If you chose to print by Person, enter the SSN or Datatel ID <ENTER>. If you selected the Department option, enter all or part of the Department number <ENTER>. A verification line will appear after each entry. Type **Y** for Yes or **N** for No. Continue this process until all employees or departments are entered. <ENTER>
4. Enter a Start Date (Optional). <ENTER>
5. If you would like a page break after each employee, enter **Y** for Yes. <ENTER> If not, enter **N** for No. <ENTER>
6. Select a printer by typing the corresponding line number. <ENTER>

~ TYPE Q AT ANY TIME TO QUIT AND RETURN TO THE PREVIOUS MENU ~

USED LEAVE REPORT (XULR)

1. From the LEAVE REPORTS MENU, type XULR.
2. Type all or part of the Department number(s) <ENTER>. A verification line will appear after each entry. <ENTER> to verify. Continue this process until all departments have been entered.
3. Enter a Start Date (Optional). <ENTER>
4. Enter an End Date (Optional). <ENTER>
5. Select a printer by typing the corresponding line number. <ENTER>

~ TYPE Q AT ANY TIME TO QUIT AND RETURN TO THE PREVIOUS MENU ~

LEAVE BALANCE REPORT (XLBR)

1. From the LEAVE REPORTS MENU, type XLBR.
2. Type all or part of the Department number(s) <ENTER>. A verification line will appear after each entry. <ENTER> to verify. Continue this process until all departments have been entered.
3. Select a printer by typing the corresponding line number. <ENTER>

~ TYPE Q AT ANY TIME TO QUIT AND RETURN TO THE PREVIOUS MENU ~

MOTT COMMUNITY COLLEGE

DEPARTMENTAL APPROVAL AND DATA ENTRY FORM

Name _____ Datatel ID _____ Employee Group _____

LEAVE BANKS	<u><i>Date(s) and Hours</i></u>
	VACATION (Request and approval should be made in advance.) _____
	SICK & EMERGENCY (Includes - but not limited to - personal illness, spouse/dependent illness, death in family.) _____
	PERSONAL BUSINESS (Request and approval should be made in advance. Personal business is to be used for activities that cannot be completed outside of normal business hours.) _____
	OCCURRENCE TIME (PSO) _____
	PAID TIME OFF _____
	COMPENSATORY (COMP) TIME EARNED (+) (There is a maximum accrual allowed. See individual Bargaining Agreements for applicable rules.) _____
COMPENSATORY (COMP) TIME USED (-) _____	

MISCELLANEOUS ABSENCES	<u><i>Datatel "Comment" Code</i></u>	<u><i>Date(s) and Hours</i></u>
	Jury Duty (Paid) PDJD	_____
	Union Business (Paid) PDUB	_____
	Union Business (Unpaid) UPUB	_____
	Military Leave (Paid) PDML	_____
	Military Leave (Unpaid) UPML	_____
	Personal Time—Approved (Unpaid) UPLA	_____
Personal Time—Unapproved (Unpaid) UPLU	_____	

OTHER	<u><i>Reason</i></u>	<u><i>Date(s) and Hours</i></u>
	OVERTIME _____	_____
	SUBSTITUTE NEEDED? _____ Yes _____ No _____	_____
SUBSTITUTE NAME _____		_____

Employee Signature _____ Date _____

Supervisor Signature _____ Date _____

SUPERVISORS AND/OR DATA ENTRY OPERATORS:

According to the collective bargaining agreements, employees may not use leave time until it is earned. Therefore, they cannot carry negative balances in their leave banks or borrow against future accruals. Please check leave balances before approving and/or entering hours in Datatel.

Entered in Datatel by: _____

Date: _____