

TOPIC 7: FLEXIBLE TIME USAGE

The purpose of this topic is to present the steps involved in entering flex time usage for exception-paid employees in the SAM II HR/Payroll System. In this topic, you will enter flex time usage using the Current Period Timesheet (CPER) and the Leave Accrual (LEAV) document.

At this end of this topic, you will be able to:

- Enter flex time usage when there is an existing comp time balance
- Enter flex time usage when there is no comp time balance
- Enter flex time usage when the events span multiple pay periods



NOTES

FLEXIBLE TIME USAGE



Exception-paid employees may utilize “flex time” - working additional hours one day, then working fewer hours on another day, or vice versa (fewer hours followed by additional hours) so that the total hours worked match the employee’s regular work schedule. These events need to be recorded differently based on the FLSA and pay period cycles, as well as the status of the employee’s existing comp time balances.

There are three options available for processing flex time:

1. The first option in all cases is to use an existing comp time balance for the hours the employee wishes to flex.
2. If the events (additional hours and flex time) occur in a contained FLSA cycle within the current pay period and the employee does not have any adequate comp time, a “FLEX” event will be used to record time correctly.
3. If the events (additional hours and flex time) span multiple pay periods, additional measures will need to be taken to ensure that the time is processed correctly in the system.

Flex time usage may be entered on a Current Period Timesheet (CPER), Current Period Individual Timesheet (CITS), Current Period Crew Timesheet (CREW) or Prior Period Timesheet (PPER), as appropriate.

CURRENT PERIOD TIMESHEET (CPER)



Batch / Document Entry

Document Type: View by: Name Code

Batch ID: Organization:

Document ID:

Automatic Document Numbering

New Open Scan



NOTES

FLEXIBLE TIME USAGE



An exception paid employee has worked 3 additional hours on the 1st day of the week because he/she plans to take off 3 hours early on the 5th day of the week. He/she currently holds a state comp time balance of 32 hours.

Let's complete a CPER to process a flex time usage for the employee described in the above scenario.

Step 1 To open a CPER from the SAM II Desktop Navigator window, click on the Go To button. Type CPER in the **CODE**. Click on the Open button.

Step 2 You will receive an initial window entitled "Batch/Document Entry". This window acts as a doorway to various documents within the SAM II HR/Payroll System.

Step 3 Populate the following fields on the Batch/Document Entry window.

ORGANIZATION – SEE STUDENT CARD.

DOCUMENT ID – SEE STUDENT CARD.

AUTOMATIC DOCUMENT NUMBERING – CHECK BOX.

OK – Select OK.

Once you select the OK button, a CPER document will open.

CURRENT PERIOD TIMESHEET (CPEP)



Batch: Document: CPER 010 TL7W012

Name:

Employee ID: 060 - 42 - 0001 Appointment ID:

Input Total: Computed Input Total:

Event View Overrides View

Event Date	Event Type	Amount
05 / 01 / 00	ADDHR	3
05 / 05 / 00	SC	3

Messages Status: NEW Ln 1/2 4:08 PM 05/10/00



NOTES



CURRENT PERIOD TIMESHEET (CPER)

Step 4 Populate the fields on the header section of the CPER.

EMPLOYEE ID – SEE STUDENT CARD.

APPOINTMENT ID – LEAVE BLANK.

Step 5 Populate the fields on the Event View panel of the CPER for the hours of ShareLeave used.

EVENT DATE	EVENT TYPE	AMOUNT
SEE STUDENT CARD	ADDHR	3
SEE STUDENT CARD	SC	3

CURRENT PERIOD TIMESHEET (CPER)



Batch: Document: CPER 010 TL7W012

Name: BARNES, KEVIN

Employee ID: 050 - 42 - 0001 Appointment ID: []

Input Total: [] Computed Input Total: []

Event View Overrides View

Event Date	Event Type	Amount
05 / 01 / 00	ADDHR	3.00
05 / 05 / 00	SC	3.00

1 of 3: APPROVAL 1 APPLIED Messages Status: PEND3 Ln 2/2 3:43 PM 05/10/00



NOTES



CURRENT PERIOD TIMESHEET (CPER)

You have completed entering an employee's time and/or leave on a CPER and it is time to process and approve the document. Remember that the Process: Edit step applies edits to the timesheet information to verify the validity of the events and the employee's leave/pay policies. It also checks if the employee has sufficient leave balances to support the amounts specified. After a document is free of errors, the necessary levels of approval are applied. Your ability to apply approvals is determined by the security profile that you have been assigned. Also, remember that items will enter and leave your worklists based on what stage of the process that the document is in, what your security profile allows you to do, and your agency's workflow rules.

Now let's complete the processing of the CPER you created.

Step 1 Select Process: Edit.

If the document is free of errors, a message will appear in the yellow message bar at the bottom of the document window telling you that approvals are ready to be applied. If the document contains errors, messages will appear specifying the errors. You would need to correct the errors and repeat Step 1.

Step 2 Select Process: Approve.

The document will move to other worklists based upon the levels of approval that need to be applied and what your security profile permits.

Step 3 Close the document.

For training purposes, you will stop at this point. In this class, the document is routed to the instructor's worklist. The instructor will complete the next step. However, in the "real world", the final approver will perform the following steps.

Step 4 Select Process: Approve. The document is now ready to be run.

Step 5 Select Process: Run.

After the document has been run, its status changes to "Accepted". The document will remain on the Document Listing (SUSF) table for a period of time. During this time period, accepted documents can be reviewed, but not changed.

CURRENT PERIOD TIMESHEET (CPER)



Batch / Document Entry

Document Type: View by: Name Code

Batch ID: Organization:

Document ID:

Automatic Document Numbering

New Open Scan



NOTES

FLEXIBLE TIME USAGE



If the events (additional hours and flex time) occur in a contained FLSA cycle within the current pay period and the employee has no pre-existing comp time balance, a “FLEX” event will be used to record time correctly. You will need to verify the pay period end date and the employee’s FLSA work cycle dates. If the complete FLSA cycle in question falls within the current pay period dates, this option may be used.

An exception paid employee has a 7 day work week, a Sunday through Saturday FLSA Profile. This employee has worked 2 additional hours on the 1st day of the week, because he/she plans to take off 2 hours early on 4th day of the week. The complete FLSA cycle falls within the current pay period dates. The employee does not hold a comp time balance.

Let’s complete a CPER to process the employee’s flex time usage.

Step 1 To open a CPER from the SAM II Desktop Navigator window, click on the Go To button. Type **CPER** in the **CODE**. Click on the Open button.

Step 2 You will receive an initial window entitled “Batch/Document Entry”. This window acts as a doorway to various documents within the SAM II HR/Payroll System.

Step 3 Populate the following fields on the Batch/Document Entry window.

ORGANIZATION – SEE STUDENT CARD.

DOCUMENT ID – SEE STUDENT CARD.

AUTOMATIC DOCUMENT NUMBERING – CHECK BOX.

OK – Select OK.

Once you select the OK button, a CPER document will open.

CURRENT PERIOD TIMESHEET (CPER)



Batch: Document: CPER 555 TL7W3510

Name:

Employee ID: Appointment ID:

Input Total: Computed Input Total:

Event View | Overrides View

Event Date	Event Type	Amount
<input type="text" value="04 / 24 / 00"/>	<input type="text" value="ADDHR"/>	<input type="text" value="2"/>
<input type="text" value="04 / 28 / 00"/>	<input type="text" value="FLEX"/>	<input type="text" value="2"/>

Messages Status: NEW Ln 1/2 4:16 PM 05/10/00



NOTES



CURRENT PERIOD TIMESHEET (CPER)

Step 4 Populate the fields on the header section of the CPER.

EMPLOYEE ID – SEE STUDENT CARD.

APPOINTMENT ID – LEAVE BLANK.

Step 5 Populate the fields on the Event View panel of the CPER for the hours of ShareLeave used.

EVENT DATE	EVENT TYPE	AMOUNT
SEE STUDENT CARD	ADDHR	2
SEE STUDENT CARD	FLEX	2

CURRENT PERIOD TIMESHEET (CPER)



Batch: Document: CPER 555 TL7W3510

Name: BARNES, KEVIN

Employee ID: 060 - 41 - 0001 Appointment ID: []

Input Total: [] Computed Input Total: []

Event View Overrides View

Event Date	Event Type	Amount
04 / 24 / 00	ADDHR	2.00
04 / 28 / 00	FLEX	2.00

1 of 3: APPROVAL 1 APPLIED Messages Status: PEND3 Ln 1/2 4:16 PM 05/10/00



NOTES



CURRENT PERIOD TIMESHEET (CPER)

You have completed entering an employee's time and/or leave on a CPER and it is time to process and approve the document. Remember that the Process: Edit step applies edits to the timesheet information to verify the validity of the events and the employee's leave/pay policies. It also checks if the employee has sufficient leave balances to support the amounts specified. After a document is free of errors, the necessary levels of approval are applied. Your ability to apply approvals is determined by the security profile that you have been assigned. Also, remember that items will enter and leave your worklists based on what stage of the process that the document is in, what your security profile allows you to do, and your agency's workflow rules.

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Step 2 Select Process: Approve.

The document will move to other worklists based upon the levels of approval that need to be applied and what your security profile permits.

Step 3 Close the document.

For training purposes, you will stop at this point. In this class, the document is routed to the instructor's worklist. The instructor will complete the next step. However, in the "real world", the final approver will perform the following steps.

Step 4 Select Process: Approve. The document is now ready to be run.

Step 5 Select Process: Run.

After the document has been run, its status changes to "Accepted". The document will remain on the Document Listing (SUSF) table for a period of time. During this time period, accepted documents can be reviewed, but not changed.



NOTES



FLEXIBLE TIME USAGE

If the additional hours and the flex time span multiple pay periods, additional measures will have to be taken to ensure that the time is processed correctly in the system. This situation would occur when the pay period ends in the middle of a week and the employee works additional hours during the first part of the week to “flex” the last part of the week. Even though these days are during the same week, they are recognized by the system as belonging to different pay periods, so the time cannot be “flexed” as it is during a complete FLSA cycle within the current pay period. Since incomplete FLSA information will be available to the system at the end of the first pay period, the additional hours worked during the first part of the week will be recycled and processed during the next pay period when information for the entire FLSA period is available. This means that those specific hours will not be available in the employee’s comp time balance for use later in the week. However, another portion of the balance may be used, which will then be replaced after the next pay period with the additional hours from the first part of the week.

For example, an employee works 4 additional hours on Monday, in order to “flex” 4 hours on Thursday. However, the current pay period ends on Tuesday of that week.



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FLEXIBLE TIME USAGE

In order to process time accurately for the example described earlier, the following must be done:

1. Process a LEAV document to accrue a state comp time of 4 hours (this is also the amount of time the employee wants to flex) within the current FLSA cycle as result of working additional hours. (Event Type: 1SCMP – State Comp Time Accrual) **NOTE:** Comp Time Accrual events such as 1SCMP (or 1FCMP) will **immediately update** employees' Comp Time balances when the document reaches an 'Accepted' status.
2. Prepare another LEAV document to reduce state comp time in the next pay period within which the end date of the FLSA cycle occurs. (Event Type: 1SCMP – State Comp Time Accrual)
 - Enter the FLSA cycle end date for the EVENT DATE and –4 for the AMOUNT.
 - Perform Process: Edit to ensure that the document is error-free. Select Process: Approve. Once the third level of approval is applied the document will go into a 'Scheduled' status. Do not select Process: Run or Process: Approve and Run.
 - On SUSF, scroll over to the PROCESS DATE field. Click in this field and press Escape key. Enter the first day of the pay period following the pay period that contains the FLSA cycle end-date in the PROCESS DATE field (mm/dd/yy) for the LEAV document. This document will automatically run in the system on the date specified in the PROCESS DATE field.
3. Process a CPER document to record the additional hours worked.
4. After a new pay period begins and the flex time is used, process a new CPER. In the EVENT TYPE field, enter a comp time usage event that corresponds to the accrual event entered on the LEAV document (i.e., "SC" – State Comp Usage Other) for the hours not worked because of the flex time. Also, enter the corresponding number of hours in the AMOUNT field.

When payroll runs for the second pay period, the comp time usage will be deducted from the document. When the completed FLSA period is processed, and depending on how many hours the employee actually worked during the period, the hours coded to the "ADDHR" event on the timesheet will be counted toward either the federal or state comp time balance. At this point, the second LEAV document will be processed by the system, and the extra hours that were accrued will be deducted from the appropriate comp time balance. This will have the same effect as using flex time.



TESTING YOUR KNOWLEDGE

1. What are the three options available when entering flex time usage and which of these options should be sought first?



WORKING ON YOUR OWN!!!

An exception-paid employee worked 2 additional hours on Tuesday, in order to “flex” 2 hours on Friday. This employee’s FLSA Profile is a 7-day work week, Sunday through Saturday. He/she has a state comp time balance of 32 hours.

Complete a CPER to process this scenario.

Information such as Agency, Organization, Document Prefix, Employee ID, and Dates will be given to you on your student card.



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