LATSnet

Leave and Accrual Tracking System

Administrative Manual

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CMA

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Table maintenance procedures allow persons with the proper authorization to view, edit, and create entries in tables LATS uses to organize information about your organization. Each section in this chapter will describe the procedures to be followed for table maintenance.

Organizational Structure

The organizational structure in LATS consists of a four-level hierarchy of Agencies, Divisions, Bureaus and Sections. After you are established on LATS and basic table information has been entered for your organization, maintenance for these tables should be minimal. If you become responsible for a new agency, or reorganization occurs within your agency, it may become necessary to add or revise these tables. These tables may also be changed and updated through HRIS or some other HR system your organization uses to keep information current. Information established on these tables is used in reports, security and mass assignments that include or is grouped by individual areas within your organization.

Agencies

Viewing Agency Information

Step #	Active Window	Action
1	Home Page	
2	Table Maintenance	
3	Organizational Structure	Click on the appropriate agency link in the "tree" on the left hand side of the page.

Creating a New Agency

TABLE MAINTENANCE > ORGANIZATIONAL STRUCTURE

Step #	Active Window	Action
1	Home Page	
2	Table Maintenance	
3	Organizational Structure	TABLE MAINTENANCE > ORGANIZATIONAL STRUCTURE. Click NEW AGENCY BUTTON. LATS will display the Edit Agency Screen.
4	Edit Agency	Enter the information about the agency.
5		Agency Code: A five-digit code which uniquely identifies the agency.
6		Title: The full name of the agency.
7		Short title: A four-digit abbreviation which uniquely identifies the agency.
8		Default Agency: Select Y or N from the drop-down list to indicate whether this agency is to be used when you open a LATS administrative session.
9		Default Hrs. Per Day: Options are 7.00, 7.50 or 8.00
10		Transfer Payments: Select Yes or No from the drop down list to indicate if payments are to be transferred from LATS. A value of Yes means that payments will transmit out of LATS.
11		Auto-Generate TDS Task Code: Select Y or No from the drop down list to indicate whether or not the TDS Task Code will be automatically created for you or if you will be required to enter one manually.
12		TDS Agency: Select the Agency from the drop down list to indicate the appropriate TDS Agency.

13		Fiscal Year Begin: select the Month and the day that the agency fiscal year begins.
14		Default Present/Absent: Setting this to YES will provide Present/Absent timesheets to the employee. Default is set to No.
15		External Hourly Payments: Setting this to YES will include the regular hourly payments in the miscellaneous payment interface file. Default is set to No.
16		Click SAVE

Modifying the information associated with an existing Agency

TABLE MAINTENANCE > ORGANIZATIONAL STRUCTURE

Step #	Active Window	Action
1	Home Page	
2	Table Maintenance	
3	Organizational Structure	Locate the desired agency on the left side of the screen (the “tree”).
4		Click on the agency name to be modified.
5	Edit Agency	LATS will display the Edit Agency screen. Make desired changes.
6		Agency code: You may not make changes to this field.
7		Title: The full name of the agency.
8		Short title: A four-digit abbreviation which uniquely identifies the agency.
9		Default Agency: Select Y or N from the drop-down list to indicate whether this agency is to be used when you open a LATS administrative session.
10		Default Hrs. Per Day: Options are 7.00, 7.50 or 8.00
11		Transfer Payments: Select Y or No from the drop down list to indicate if payments are to be transferred from LATS.

12		Auto-Generate TDS Task Code: Select Y or No from the drop down list to indicate whether or not the TDS Task Code will be automatically created for you or if you will be required to enter one manually.
13		TDS Agency: Select the Agency from the drop down list to indicate the appropriate TDS Agency.
13		Fiscal Year Begin: select the Month and the day that the agency fiscal year begins.
14		Default Present/Absent: Yes forces all employees in this agency to use a Present Absent timesheet regardless of Neg Unit, Salary Grade, Overtime status etc.…
15		Click SAVE.

Designating a Default Agency

TABLE MAINTENANCE > ORGANIZATIONAL STRUCTURE

Step #	Active Window	Action
1	Home Page	
2	Table Maintenance	
3	Organizational Structure	Locate the desired agency on the left side of the screen (the "tree"). Click on the agency name to be modified. LATS will display the Edit Agency screen.
4	Edit Agency	Default Agency: Select Y from the drop-down list to indicate this agency is to be used when you open a LATS administrative session. You will be able to view and edit employees for all of your agencies even if you do not set an agency to default Y.
5		Click SAVE.

Divisions

Viewing Division Information

TABLE MAINTENANCE > ORGANIZATIONAL STRUCTURE

Step #	Active Window	Action
1	Home Page	
2	Table Maintenance	
3	Organizational Structure	Click on the plus sign next to the appropriate agency and expand the "tree"
4		Click on the Division Name
5		

Creating a New Division

TABLE MAINTENANCE > ORGANIZATIONAL STRUCTURE

Step #	Active Window	Action
1	Home Page	
2	Table Maintenance	
3	Organizational Structure	Click on the plus sign next to the desired agency. LATS will display the Edit Agency screen.
4	Edit Agency	Click on the New Division button. LATS will display the Edit Division screen.
5	Edit Division	Enter the information about the division:
6		Agency: Read only. Defaulted from the original agency selected.
7		Division Code: Enter a three-digit code which uniquely identifies the division within the selected agency.
8		Title: The full title of the division.
9		Short Title: A four-digit code used as a short name for the division.
10		Inactive: Select Y if the division is inactive; select N if the division is active.
11		Click SAVE.

Note: If a Division is designated as inactive, it will not be available for selection or appear on current reports or on employee information. Information for an inactive division will be available for reports run on historical data.

Changing Division Information

TABLE MAINTENANCE > ORGANIZATIONAL STRUCTURE

Step #	Active Window	Action
1	Home Page	
2	Table Maintenance	
3	Organizational Structure	Click on the plus sign next to the appropriate agency and expand the “tree”
4		Click on the Division. LATS will display the Edit Division screen.
5	Edit Division	Make any necessary changes.
6		Agency: You may not make changes to this field
7		Division Code: You may not make changes to this field.
8		Title: The full title of the Division.
9		Short Title: A four-digit code used as a short name for the division.
10		Inactive: Select Y if the division is inactive; select N if the division is active.
11		Click SAVE.

Note: Changing the description for a Division will change the description system-wide, including the description on previous timesheets.

Bureaus

Viewing Bureau Information

TABLE MAINTENANCE > ORGANIZATIONAL STRUCTURE

Step #	Active Window	Action
1	Home Page	
2	Table Maintenance	
3	Organizational Structure	Click on the plus sign next to the appropriate agency and expand the “tree”
4		Click on the plus sign next to the appropriate division.

5		Click on the appropriate bureau name.

Creating a New Bureau

TABLE MAINTENANCE > ORGANIZATIONAL STRUCTURE

Step #	Active Window	Action
1	Home Page	
2	Table Maintenance	
3	Organizational Structure	Click on the plus sign next to the appropriate agency and expand the "tree"
4		Click on appropriate division name. LATS will display the Edit Division screen.
5	Edit Division	Click on the New Bureau button. LATS will display the Edit Bureau screen.
6	Edit Bureau	Enter information about the bureau.
7		Agency: Read only. Defaulted from the agency selected.
8		Division: Read only. Defaulted from the division selected.
9		Bureau Code: A three-digit code which uniquely identifies the bureau within the division.
10		Title: The full title of the bureau.
11		Short Title: A four-character abbreviation of the bureau's title.
12		Inactive: Select Y if the division is inactive; select N if the bureau is active. An Inactive Bureau will not be available for selection or use.
13		Click SAVE.

Changing Bureau Information

TABLE MAINTENANCE > ORGANIZATIONAL STRUCTURE

Step #	Active Window	Action
1	Home Page	
2	Table Maintenance	
3	Organizational Structure	Click on the plus sign next to the appropriate agency and expand the "tree"
4		Click on t the plus sign next to the appropriate division and expand the "tree "
5		Click on the appropriate bureau name. LATS will display the Edit Bureau screen.
6	Edit Bureau	Make any necessary changes to fields.
7		Agency: You may not make changes to this field
8		Division Code: You may not make changes to this field.
9		Bureau Code: You may not make changes to this field.
10		Title: The full title of the Division.
11		Short Title: A four-digit code used as a short name for the division.
12		Inactive: Select Y if the division is inactive; select N if the division is active.
13		Click SAVE.

Note: Changing the description for a Bureau will change the description system-wide, including the description on previous timesheets.

Sections

Viewing Section Information

TABLE MAINTENANCE > ORGANIZATIONAL STRUCTURE

Step #	Active Window	Action
1	Home Page	
2	Table Maintenance	
3	Organizational Structure	Click on the plus sign next to the appropriate agency and expand the "tree"

4		Click on the plus sign next to the appropriate division and expand the "tree"
5		Click on the plus sign next to the appropriate bureau and expand the "tree"
6		Click on the appropriate section name

Creating a New Section

TABLE MAINTENANCE > ORGANIZATIONAL STRUCTURE

Step #	**Active Window**	**Actions**
1	Home Page	
2	Table Maintenance	
3	Organizational Structure	Click on the plus sign next to the appropriate agency and expand the "tree"
4		Click on the plus sign next to the appropriate division and expand the "tree"
5		Click on the appropriate bureau name. LATS will display the Edit Bureau screen.
6	Edit Bureau	Click on the New Section button. LATS will display the Edit Section screen.
7	Edit Section	Enter information about the section.
8		Agency: Read only. Defaulted from the agency selected.
9		Division: Read only. Defaulted from the division selected.
10		Bureau: Read only. Defaulted from the bureau selected.
11		Section Code: A three-digit code which uniquely identifies the section within the bureau.
12		Title: The full title of the section.

13		Short Title: A four-character abbreviation of the section's title.
14		Inactive: Select Y if the section is inactive; select N if the section in inactive. An Inactive Section will not be available for selection or use.
15		Click SAVE.

Changing Section Information

TABLE MAINTENANCE > ORGANIZATIONAL STRUCTURE

Step #	Active Window	Action
1	Home Page	
2	Table Maintenance	
3	Organizational Structure	Click on the plus sign next to the appropriate agency and expand the “tree”
4		Click on the plus sign next to the appropriate division and expand the “tree”
5		Click on the plus sign next to the appropriate bureau and expand the “tree”
6		Click on the appropriate section name. LATS will display the Edit Section screen.
7		Make any necessary changes in fields.
8		Agency: You may not make changes to this field
9		Division Code: You may not make changes to this field.
10		Bureau Code: You may not make changes to this field.
11		Section Code: You may not make changes to this field.
12		Title: The full title of the Division.
13		Short Title: A four-digit code used as a short name for the division.

14		Inactive: Select Y if the division is inactive; select N if the division is active.
15		Click SAVE.

Note: Changing the description for a Section will change the description system-wide, including the description on previous timesheets.

Location

A location is a locale to which an employee has been assigned. A location can include several buildings or an entire city; by contrast, a work location may be a single room, floor or building.

Viewing Locations

TABLE MAINTENANCE > LOCATIONS

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Locations	Enter search criteria, select the Search button. LATS will search all of the Location fields for a match on the entered criteria.
4		Search results are displayed. Click on the appropriate row to display Location Details.

Creating a new Location

TABLE MAINTENANCE > LOCATIONS

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Locations	Click on the Add tab
4		Enter information for the new location.
5		Location Code: Enter a four-character code which uniquely defines the location.
6		Title: Enter the name of the location.
7		Short Title: Enter a one- to four-character abbreviation

		which will be used to represent the location.
8		Inactive: From the drop-down list, select NO if the location will be active or YES if the location will be inactive.
9		Click SAVE.

Changing a Location

TABLE MAINTENANCE > LOCATIONS

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Locations	Enter search criteria, select the Search button. LATS will search all of the Location fields for a match on the entered criteria.
4		Search results are displayed. Click on the appropriate row to display Location Details. LATS will display the Modify Tab
5	Modify tab	Make any necessary changes. Note the Location Code may not be changed.
6		SAVE.

Negotiating Units

The most common Negotiating Units have been established on LATS and table information will be available before you begin to use LATS. Negotiating Units are attached to employees and are used to define specific rules in LATS, according to a Union contract or Department policy. There are some specific fields that may be modified within your agency to enable you to modify timesheet requirements for your agency.

Example

You may choose to require all employees within a specific NU to complete time in/time out timesheets vs. Present/Absent timesheets. You may also limit the number of hours employees may accrue under the Comp Over 40 option.

Viewing a Negotiating Unit

TABLE MAINTENANCE > NEGOTIATING UNITS

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Negotiating Units	Enter search criteria, select the Search button. LATS will search all of the Negotiating Units fields for a match on the entered criteria.
4		Search results are displayed. Click on the appropriate row to display Negotiating Unit Details.

Creating a New Negotiating Unit

TABLE MAINTENANCE > NEGOTIATING UNITS

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Negotiating Units	Click on the Add tab
4		Enter information about that negotiating unit.
5		Negotiating Unit Code: Enter a one- to two-digit code which your LATS installation will use to identify the negotiating unit. Example: 02 for CSEA Administrative employees, 03 for CSEA Operational employees.
6		Negotiating Unit: Enter the name of the negotiating unit. Example: CSEA-2, CSEA-3
7		Required In/Out: From the drop-down list, select Y if employees represented by this negotiating unit must enter their time as In/Out or N if they do not. Example: All PS&T employees must enter time in/time out regardless of grade.
8		PA Required: From the drop-down list, select Y if

		employees represented by this negotiating unit must enter their time as Present/Absent or N if they do not. If both In/Out and P/A are chosen, LATS will select the proper timesheet based on Salary grade. Example: You may require certain MC employees to complete their timesheets using P/A.
9		Max Comp over 40: Enter the Maximum accruals amount for employees participating in the Over 40 Comp program.
10		Prefill Holiday: If this indicator is set to Yes, LATS will automatically ADD the HOL row for full time employees when the timesheet is initially saved.
11		IPP Sick Leave Rules: A values of Yes directs LATS that there are IPP Sick leave rules associated to this Negotiating Unit and the employees attached to it. This affects employees that have dates in the IPP 1 and IPP 2 fields on the Users Accruals tab of their administration record. A value of No directs LATS to not look for IPP sick leave rules.
12		Show Lunch Row: A value of Yes displays the Lunch row on the timesheet for employees attached to this Negotiating Unit and a value of No will not display the Lunch row.
13		Show Tardy Row: This setting indicates whether or not employees attached to this Negotiating Unit will see the Tardy row on their timesheet or not. ** If there is No Tardy Key selected in the

		LATS main configuration table a Tardy Row will not be displayed on the time sheet regardless of this setting.
14		Show VRWS Row: A value of Yes displays the VRWS row for employees attached to this Negotiating Unit. A value of No does not display the VRWS row for employees attached to this Negotiating Unit
15		Use Enhanced OT Rules: If this setting is set to Yes, LATS will enforce the enhanced OT rules where overtime may be converted to straight time if unscheduled sick leave is used in the same week that the OT is earned. A value of No in this field bypasses the enhanced OT logic.
16		Max Holidays Paid: This value identifies the maximum number of holidays that seasonal employees are allowed to earn per year.
17		Min Hours Straight: Seasonal employees must work a minimum number of hours per season before becoming eligible for holiday pay. This threshold can vary by NU.
18		Min Weeks Full: Seasonal employees must work a minimum number of weeks at full pay (meeting the Min Hours per Week) per season before becoming eligible for holiday pay. This threshold can vary by NU.
19		Min Hours Week: Seasonal employees must work a minimum number of hours per week per season before becoming eligible for holiday pay. This threshold can vary by NU.

20		Enable Pre-shift: A value of Yes in this field displays the Pre-shift check box on employee's timesheets that are attached to this Neg Unit. **This is just a visual identifier and does not have pre-shift payment logic attached to it.
		Click SAVE.

Changing a Negotiating Unit

TABLE MAINTENANCE > NEGOTIATING UNITS

Step #	**Active Window**	**Actions**
1	Home Page	
2	Table Maintenance	
3	Negotiating Units	Enter search criteria, select the Search button. LATS will search all of the Negotiating Units fields for a match on the entered criteria.
4		Search results are displayed. Click on the appropriate row to display Negotiating Unit Details. LATS will display the Modify Tab.
5	Modify Tab	Make any necessary changes.
6		Click SAVE

Titles

Your LATS system may already include all of your agencies active titles and new titles may be added via HRIS/NYSTEP or in some other HR systems your organization provided. In that case, you will only need to add to or correct current information

Viewing a Title

TABLE MAINTENANCE > TITLES

Step #	**Active Window**	**Actions**
1	Home Page	
2	Table Maintenance	
3	Titles	Enter search criteria, select the Search button. LATS will

		search all of the Titles fields for a match on the entered criteria.
4		Search results are displayed. Click on the appropriate row to display Title Details.

Creating a New Title

TABLE MAINTENANCE > TITLES

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Titles	Click ADD tab.
4		Title Code: Enter unique code for this title.
5		Title: Enter the full description for this title.
6		Short Title: Enter the short description for this title (20 character maximum). This field will display when the employee or administrator reviews employee information on the timesheet.
7		Negotiating Unit: From the drop-down list, select the Negotiating Unit which will represent this title. ***(No longer has functionality in LATS)***
8		Click SAVE.

Changing a Title

TABLE MAINTENANCE > TITLES

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Titles	Enter search criteria, select the Search button. LATS will search all of the Titles fields for a match on the entered criteria.
4		Search results are displayed. Click on the appropriate row to display Title

		Details. LATS will display the Modify Tab.
5	Modify Tab	Make any necessary changes.
6		Click SAVE.

Deleting a Title

TABLE MAINTENANCE > TITLES

Step #	**Active Window**	**Actions**
1	Home Page	
2	Table Maintenance	
3	Titles	Enter search criteria, select the Search button. LATS will search all of the Titles fields for a match on the entered criteria.
4		Search results are displayed. Click on the appropriate row to display Title Details. LATS will display the Modify Tab.
5	Modify Tab	Select Delete
6		Message will be displayed asking for confirmation of the Delete.

Cost Centers

TABLE MAINTENANCE > COST CENTERS

Viewing Cost Center Information

Step #	**Active Window**	**Actions**
1	Home Page	
2	Table Maintenance	
3	Cost Centers	Enter search criteria, select the Search button. LATS will search all of the Cost Center fields for a match on the entered criteria.
4		Search results are displayed. Click on the appropriate row to display Cost Center Details

Creating a New Cost Center

TABLE MAINTENANCE > COST CENTERS

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Cost Centers	Click Add tab.
4		Enter information about the cost center.
5		Cost Center: Enter a name for the cost center; up to six characters may be used.
6		Variable: Enter the variable with which this cost center will be associated; up to two characters may be used.
7		Budget Year: Enter the fiscal year in which this cost center will be active.
8		Begin Date: Click on the calendar. From the calendar window, select a start date.
9		End Date: Click on the calendar. From the calendar window, select an end date.
10		Click SAVE.

Changing Cost Center Information

TABLE MAINTENANCE > COST CENTERS

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Cost Centers	Enter search criteria, select the Search button. LATS will search all of the Cost Center fields for a match on the entered criteria.
4		Search results are displayed. Click on the appropriate row to display Cost Center Details. LATS will display the Modify Tab
5	Modify Tab	Make the desired changes.
6		Click SAVE.

Note: Cost Centers may not be deleted once saved; however, you may make them inactive.

Deleting a Cost Center

TABLE MAINTENANCE > Cost Center

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Cost Center	Enter search criteria, select the Search button. LATS will search all of the Cost Center fields for a match on the entered criteria.
4		Search results are displayed. Click on the appropriate row to display Cost Center Details. LATS will display the Modify Tab.
5	Modify Tab	Select Delete
6		Message will be displayed asking for confirmation of the Delete.

Object Codes

Viewing Object Codes

TABLE MAINTENANCE > OBJECT CODES

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Object Codes	Enter search criteria, select the Search button. LATS will search all of the Object codes fields for a match on the entered criteria.
4		Search results are displayed. Click on the appropriate row to display Object Codes Details.

Creating a New Object Code

TABLE MAINTENANCE > OBJECT CODES

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	

3	Object Codes	Click NEW OBJECT CODE.
4		Enter information about the Object Code.
5		Object Code: Enter a code of up to five characters which uniquely identifies the object code.
6		Description: Enter a description of the object code and its use.
7		Active: Select Yes or No to indicate if the object is currently in use.
8		Click SAVE.

Changing an Object Code

TABLE MAINTENANCE > OBJECT CODES

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Object Codes	Enter search criteria, select the Search button. LATS will search all of the Object Codes fields for a match on the entered criteria.
		Search results are displayed. Click on the appropriate row to display Object Codes Details. LATS will display the Modify Tab.
4	Modify Tab	Make desired changes.
5		Click SAVE.

Note: Object codes cannot be deleted once used; however, you may make them inactive.

Deleting an Object Code

TABLE MAINTENANCE > Object Code

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Object Codes	Enter search criteria, select the Search button. LATS will search all of the

		Object Codes fields for a match on the entered criteria.
4		Search results are displayed. Click on the appropriate row to display Object Code Details. LATS will display the Modify Tab.
5	Modify Tab	Select Delete
6		Message will be displayed asking for confirmation of the Delete.

Work Locations

A work location is a specific location at which an employee works. It is more specific than the Location variable, which identifies only the locale to which an employee is assigned. A single Location can include several buildings or a city; a Work Location can be used to identify a specific building, floor or room to which the employee is assigned. If your agency chooses to enable this feature, the Work Location will appear on the employee timesheet.

Viewing Work Locations

TABLE MAINTENANCE > Work Locations

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Work Locations	Enter search criteria, select the Search button. LATS will search all of the Work Locations fields for a match on the entered criteria.
4		Search results are displayed. Click on the appropriate row to display Work Locations Details.

Creating a Work Location

TABLE MAINTENANCE > WORK LOCATIONS

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Work Locations	Click ADD tab.

4		Enter the following information.
5		Code: A unique code (up to 10 characters) for the work location.
6		Description: A precise description for the work location.
7		Agency: Set “All Agencies’ or specify the Agency for the Work Location being created.
8		Click SAVE

Uploading a Work Location

TABLE MAINTENANCE > WORK LOCATIONS

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Work Locations	Click UPLOAD tab.
4		Click BROWSE
5		Navigate to the location of the CMA formatted spreadsheet
6		Click UPLOAD

Modifying the Description of the Work Location

TABLE MAINTENANCE > WORK LOCATIONS

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Work Locations	Enter search criteria, select the Search button. LATS will search all of the Work Locations fields for a match on the entered criteria.
4		Search results are displayed. Click on the appropriate row to display Work Locations Details. LATS displays the Modify tab.
5	Modify Tab	Modify the description.
6		Click SAVE.

Deleting a Work Location

TABLE MAINTENANCE > WORK LOCATIONS

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Work Locations	Enter search criteria, select the Search button. LATS will search all of the Work Locations fields for a match on the entered criteria.
4		Search results are displayed. Click on the appropriate row to display Work Locations Details. LATS displays the Modify tab.
5	Modify Tab	Click DELETE.
		Message will be displayed asking for confirmation of the Delete.

Note: A Work Location cannot be deleted once it is assigned to an employee.

Tips

Tips may be added, modified or deleted as required. Tips that are active are displayed in order of entry and only one will be displayed daily. Tips are not limited by dates. You may stop a tip from displaying by changing it to inactive in "Modifying a Tip".

Note: The Home page will not display for all employees if there is no active announcement.

Viewing Tips

TABLE MAINTENANCE > Tips

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Tips	Enter search criteria, select the Search button. LATS will search all of the Tips fields for a match on the entered criteria.

4		Search results are displayed. Click on the appropriate row to display Tips Details.

Creating a New Tip

TABLE MAINTENANCE > TIPS

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Tips	Click on the Add Tab.
5		Enter the following information:
6		Title: Enter a unique title for the tip you want to add.
7		Text: Enter the text of the tip you want to display on the Home Page on LATS.
8		Active: From the drop-down list, enter Y if you want the tip to be Active; enter N if you do not want the tip to be active.
9		Click Save.

Note: A tip will not be displayed immediately when added. Tips are displayed, one per day, in the entry order.

Modifying a Tip

TABLE MAINTENANCE > TIPS

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Tips	Enter search criteria, select the Search button. LATS will search all of the Tips fields for a match on the entered criteria.
4		Search results are displayed. Click on the appropriate row to display Tips Details. LATS will display the Modify tab.
5	Modify Tab	Make any necessary changes.

6		To make inactive, change to No in the ACTIVE box.
7		Click SAVE.

Deleting a Tip

TABLE MAINTENANCE > TIPS

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Tips	Enter search criteria, select the Search button. LATS will search all of the Tips fields for a match on the entered criteria..
4		Search results are displayed. Click on the appropriate row to display Tips Details. LATS will display the Modify tab.
5	Modify Tab	Click DELETE.
6		Message will be displayed asking for confirmation of the Delete.

Announcements

Announcements will be displayed on a Home Page. If enabled and an active announcement exists, the LATS will display the Home Page when an employee logs in LATS. The employee must then click the TIMESHEET tab to open the timesheet.
Beginning and Endings Dates define an announcement's life span. LATS will display all active announcements on the home page every day they are active. You may end the display of an announcement by deleting the announcement or you may modify the end date to stop displaying the announcement. Modifying the end date will retain the announcement for display in the future.

Viewing Tips

TABLE MAINTENANCE > ANNOUNCEMENTS

Step #	Active Window	Actions

1	Home Page	
2	Table Maintenance	
3	Announcements	Enter search criteria, select the Search button. LATS will search all of the Announcements fields for a match on the entered criteria.
4		Search results are displayed. Click on the appropriate row to display Announcements Details.

Creating a New Announcement

TABLE MAINTENANCE > ANNOUNCEMENTS

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Announcements	Click on the Add tab.
4		Topic: Enter a unique topic for the announcement you want to add.
5		Content: Enter the text of the announcement you want to add.
6		Begin Date: Click on the calendar next to this field and choose the date you want this announcement to be displayed.
7		End Date: Click on the calendar next to this field and choose the date you want to stop displaying this announcement.
8		Click SAVE.

Modifying an Announcement

TABLE MAINTENANCE > ANNOUNCEMENTS

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	

3	Announcements	Enter search criteria, select the Search button. LATS will search all of the Announcements fields for a match on the entered criteria.
4		Search results are displayed. Click on the appropriate row to display Announcements Details. LATS will display the Modify Tab.
5	Modify Tab	Make necessary changes.
6		Click "Save".

Deleting an Announcement

TABLE MAINTENANCE > ANNOUNCEMENTS

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Announcements	Enter search criteria, select the Search button. LATS will search all of the Announcements fields for a match on the entered criteria
4		Search results are displayed. Click on the appropriate row to display Announcements Details. LATS will display the Modify Tab.
5	Modify Tab	Click on "Delete".
6		Message will be displayed asking for confirmation of the Delete.

Time Clock Card

TABLE MAINTENANCE > TIMECLOCK CARD

Viewing all employees that are configured for a Time Clock Card

The Time Clock Card application allows the system administrator to manage and assign the users Time Clock Cards. It will allow a search by Employee, Card ID or All Employees (default search). An employee MUST already have the Time Clock user configuration checked on their employee profile for them to appear in this application.

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Time Clock Cards	Defaults to the list of All Clock Users.
4		To search for a specific TimeClock Card change the Search By dropdown to Card ID and enter the Card ID and click search.
5		To search for a specific employee change the Search By dropdown to Employee and enter the Employee and click search.
6		Click on the appropriate employee row to view the Card Id and Status.

Modifying a Card ID or Status

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Time Clock Cards	Defaults to the list of All Clock Users.
4		To search for a specific Time Clock Card change the Search By dropdown to Card ID and enter the Card ID and click search.
5		To search for a specific employee change the Search By dropdown to Employee and enter the Employee and click search.
6		Click on the appropriate employee row to access the Card Id and Status.
7		Modify the card id or change the card status.
8		Click Save.

Adding a Card ID or Status

TABLE MAINTENANCE > TIMECLOCK CARD

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	Time Clock Cards	Defaults to the list of All Clock Users
4		To search for a specific Time Clock Card change the Search By dropdown to Card ID and enter the Card ID and click search.
5		To search for a specific employee change the Search By dropdown to Employee and enter the Employee and click search.
6		Click on the appropriate employee row to access the Card Id and Status.
7		Add a card id and add the card status.
8		Click Save.

Deleting a Card ID

TABLE MAINTENANCE > TIMECLOCK CARD

Step #	Active Window	Actions
1	Home Page	
2	Table Maintenance	
3	TimeClock Cards	Defaults to the list of All Clock Users
4		To search for a specific TimeClock Card change the Search By dropdown to Card ID and enter the Card ID and click search.
5		To search for a specific employee change the Search By dropdown to Employee and enter the Employee and click search.
6		Click on the appropriate employee row to access the Card Id and Status.
7	Modify Tab	Select DELETE

8		Message will be displayed asking for confirmation of the Delete.

Password Rules

TABLE MAINTENANCE > PASSWORD RULES

LATS will allow the system administrator to define the password requirements that must be met when an end user creates a password. The following settings can be modified if the configuration setting for password rules in enabled.

Password Minimum Length: The minimum length the initial and subsequent passwords need to be.

Password maximum: The maximum length the initial and subsequent passwords can be.

Minimum Age (In Days): The number of days that must lapse before a password can be changed – from the last time it was changed.

Maximum Age (In Days): The number of days the password can be in effect before the system prompts the end user to create a new password.

Unique History: The frequency in which a password can be re-used. For example, if this is set to 2 then you cannot re-use a password again until you have used two different passwords.

Max Wrong Attempts: The number of incorrect login attempts made before the system locks the end user out.

Minimum Upper Case Characters: The number of upper case characters required in the password.

Minimum Lower Case Characters: The number of lower case characters required in the password.

Minimum Numeric Characters: The number of numeric characters required in the password.

Minimum Special Characters: The number of special characters required in the password.

Configurable Settings

TABLE MAINTENANCE > CONFIGURABLE SETTINGS

LATS has configurable settings, *by Agency*, that allow the system to be modified to meet customer requirements and provide additional flexibility. LATS configurable settings can be accessed by following the path below:

Step #	**Active Window**	**Actions**
1	Home Page	
2	Table Maintenance	
3	Configurable Settings	Expand the “tree” on the left panel.

4		Click on a setting and the current settings window will pop up on the right hand side of the window.
5		Value: This is where the configuration manager sets the value for the specific agency.
6		Default: This is the system default value when LATS is initiated.
7		Required: This field is disabled and is a visual
8		Requires Restart: This
9		Clone: This button allows the user to create a copy of the config setting and to be assigned to a different agency.
10		Save: Save changes made to the config setting.

Note: LATS Product Manager has already set the required configurable settings identified during the implementation process. If you wish to modify a configurable setting please contact a member of the LATS Customer Support Team prior to making any modifications to any configurable settings. The support team will be able to identify what the configuration setting does and how it will impact your current system or work flow.

***Please see the LATS Configuration addendum for complete list of LATS configurable settings.*

Earnings Combo

TABLE MAINTENANCE>EARNINGS COMBOS

Step#	**Active Window**	**Actions**
	Home Page	
	Table Maintenance	
	Earnings Combos	Click on the Search button
		Select the appropriate Pay Adj Type for the Pay Basis Earnings Code combo
		Select the Neg Unit, if applicable,

		Select Pay Basis: Annual or Hourly
		Select the Earnings Code: Active earnings codes are available in the drop down list.

Pay Basis Defaults

TABLE MAINTENANCE>PAY BASIS DEFAULTS

Step #	Active Window	Actions
	Home Page	
	Table Maintenance	
	Pay Basis Defaults	
		Select Pay Basis dropdown: Annual, Hourly, and Per Diem. The options available on the Pay Basis Defaults page are different based on the selected pay basis.
	Annual Pay Basis	TA Eligible: If checked default on the accruals tab will be TA eligible.
	Annual Pay Basis	Eligible to use Vacation: If checked the default accruals tab will be checked and employees are eligible to use vacation time.
	Annual Pay Basis	TDS Required: If checked employees are required to enter TDS data on the timesheet. ** *Checking this box enables the TDS By Percent check box.*
	Annual Pay Basis	OT Eligible: If checked the default accruals page for employees will have the OT Eligible check box checked and employees are OT eligible. ***checking this box will enable the Method of Recording OT drop box to be enabled.*

	Annual Pay Basis	Holiday Waiver: If checked the default accruals page for employees will be checked.
	Annual Pay Basis	Clock User: If checked the employees default accruals tab will have this box checked. ***Checking this will enable the Soft Clock Types drop down.*
	Annual Pay Basis	Soft Clock Types: This identifies how LATS should handle punches from the LATS Soft Clock. Options are: 1) Default – from soft clock tab to the timesheet. 2) Process as regular punch – sends soft clock punches through the lats_input_log for reporting purposes 3) Deny Soft Clock – does not display the soft clock tab. ***This option is for employees using a different type of hand reader or card reader punch clock.*
	Annual Pay Basis	Method of Recording OT: Options are Timesheet OT, Additional Time, *Overtime tab (no longer in use)*
	Annual Pay Basis	Min Hrs. Worked to Earn OT:
	Annual Pay Basis	Eligible to Earn Pass Days:
	Annual Pay Basis	HOP: This is for the old NYS Health Option Plan. ***This check box should **never** be checked.*
	Annual Pay Basis	Hours Per Day: Employees base hours per day. New employees will have the selected base hours per day as the default on the accruals page.
	Annual Pay Basis	AWS: If this is checked all employees with the annual pay basis will have the AWS check box checked and will be AWS by default. ***If this is checked it will enable the Week 1/Week 2 drop downs.*
	Annual Pay Basis	Week 1 Normal Hours: Options can be in between 35

		– 40 in quarter hour increments.
	Annual Pay Basis	Week 2 Normal Hours: Options can be in between 35 – 40 in quarter hour increments.
	Annual Pay Basis	Allow Excess Vacation Balance: If checked the default page for annual employees will have the Allow Excess Vacation box checked.
	Annual Pay Basis	TDS By Percent: If this box is checked employees will be required to enter TDS time by percent worked on each task instead of hours.
	Annual Pay Basis	Comp Over 40 Eligible: If this is checked the employee will be expected to complete the required number of hours in the Comp Over 40 row of their timesheet before being eligible to earn OT.
	Annual Pay Basis	Enforce Punch Restriction: *No longer in use*. This was for a specific customer and allowed LATS to not allow the employee to punch in before their minimum shift start time identified on their shift.
	Annual Pay Basis	Accrue Non Comp: If checked employees with less than a 40 hour work week will have the earned non comp.
	Annual Pay Basis	Num of Weeks OT Applies: This field is enabled only if the Method of Recording OT is set the Additional Time. Options are 1 week and 4 weeks.
	Annual Pay Basis	Timesheet Validation: Employees will have the timesheet validation default set to Hrs./Day and AWS or Schedules. Validation set to Hrs. Per Day /AWS looks at the employees Hours Per Day or weekly expected total if AWS. If this is set to

		Schedules LATS will look at the employee rotation to determine expected work hours per day OR the admin schedule planner.
	Annual Pay Basis	Dynamic Employee Percent: This applies to seasonal (hourly) employees. The default page for annual employees will be set to Fixed or Dynamic based on this setting.
	Annual Pay Basis	Biweekly Total: This check box only applies to non OT eligible employees. If checked, LATS will look for the expected hours for the entire pay period to be met, not on a specific day or week.
	Annual Pay Basis	Week 1 Pass days: Check days are the default days off.
	Annual Pay Basis	Week 2 Pass days: Check days are the default days off.
	Annual Pay Basis	Freeze Vacation Earnings: Affects employees who change from FT to PT and are over the new PT max allowed vacation time.
	Hourly Pay Basis	TA Eligible: If checked default on the accruals tab will be TA eligible.
	Hourly Pay Basis	Eligible to use Vacation: If checked the default accruals tab will be checked and employees are eligible to use vacation time.
	Hourly Pay Basis	TDS Required: If checked employees are required to enter TDS data on the timesheet. ** *Checking this box enables the TDS By Percent check box.*
	Hourly Pay Basis	OT Eligible: If checked the default accruals page for employees will have the OT Eligible check box checked and employees are OT eligible. ***checking this box will enable the Method of*

		Recording OT drop box to be enabled.
	Hourly Pay Basis	Holiday Waiver: If checked the default accruals page for employees will be checked.
	Hourly Pay Basis	Clock User: If checked the employees default accruals tab will have this box checked. ***Checking this will enable the Soft Clock Types drop down.*
	Hourly Pay Basis	Soft Clock Types: This identifies how LATS should handle punches from the LATS Soft Clock. Options are: 1) Default – from soft clock tab to the timesheet. 2) Process as regular punch – sends soft clock punches through the lats_input_log for reporting purposes 3) Deny Soft Clock – does not display the soft clock tab. ***This option is for employees using a different type of hand reader or card reader punch clock.*
	Hourly Pay Basis	Method of Recording OT: Options are Timesheet OT, Additional Time, *Overtime tab (no longer in use)*
	Hourly Pay Basis	Min Hrs. Worked to Earn OT:
	Hourly Pay Basis	Eligible to Earn Pass Days:
	Hourly Pay Basis	HOP: This is for the old NYS Health Option Plan. ***This check box should **never** be checked.*
	Hourly Pay Basis	Hours Per Day: Employees base hours per day. New employees will have the selected base hours per day as the default on the accruals page.
	Hourly Pay Basis	AWS: If this is checked all employees with the annual pay basis will have the AWS check box checked and will be AWS by default. ***If this is checked it will enable the Week 1/Week 2 drop downs.*

	Hourly Pay Basis	Week 1 Normal Hours: Options can be in between 35 – 40 in quarter hour increments.
	Hourly Pay Basis	Week 2 Normal Hours: Options can be in between 35 – 40 in quarter hour increments.
	Hourly Pay Basis	Allow Excess Vacation Balance: If checked the default page for annual employees will have the Allow Excess Vacation box checked.
	Hourly Pay Basis	TDS By Percent: If this box is checked employees will be required to enter TDS time by percent worked on each task instead of hours.
	Hourly Pay Basis	Comp Over 40 Eligible: If this is checked the employee will be expected to complete the required number of hours in the Comp Over 40 row of their timesheet before being eligible to earn OT.
	Hourly Pay Basis	Enforce Punch Restriction: *No longer in use*. This was for a specific customer and allowed LATS to not allow the employee to punch in before their minimum shift start time identified on their shift.
	Hourly Pay Basis	Accrue Non Comp: If checked employees with less than a 40 hour work week will have the earned non comp.
	Hourly Pay Basis	Num of Weeks OT Applies: This field is enabled only if the Method of Recording OT is set the Additional Time. Options are 1 week and 4 weeks.
	Hourly Pay Basis	Timesheet Validation: Employees will have the timesheet validation default set to Hrs./Day and AWS or Schedules. Validation set to Hrs. Per Day /AWS looks at the employees Hours Per Day

		or weekly expected total if AWS. If this is set to Schedules LATS will look at the employee rotation to determine expected work hours per day OR the admin schedule planner.
	Hourly Pay Basis	Dynamic Employee Percent: This applies to seasonal (hourly) employees. The default page for annual employees will be set to Fixed or Dynamic based on this setting.
	Hourly Pay Basis	Biweekly Total: This check box only applies to non OT eligible employees. If checked, LATS will look for the expected hours for the entire pay period to be met, not on a specific day or week.
	Hourly Pay Basis	Week 1 Pass days: Check days are the default days off.
	Hourly Pay Basis	Week 2 Pass days: Check days are the default days off.
	Hourly Pay Basis	Freeze Vacation Earnings: Affects employees who change from FT to PT and are over the new PT max allowed vacation time.
	Per Diem	TA Eligible: If checked default on the accruals tab will be TA eligible.
	Per Diem	Eligible to use Vacation: If checked the default accruals tab will be checked and employees are eligible to use vacation time.
	Per Diem	TDS Required: If checked employees are required to enter TDS data on the timesheet. ** *Checking this box enables the TDS By Percent check box.*
	Per Diem	OT Eligible: If checked the default accruals page for employees will have the OT Eligible check box checked and employees are OT

		eligible. ***checking this box will enable the Method of Recording OT drop box to be enabled.*
	Per Diem	Holiday Waiver: If checked the default accruals page for employees will be checked.
	Per Diem	Clock User: If checked the employees default accruals tab will have this box checked. ***Checking this will enable the Soft Clock Types drop down.*
	Per Diem	Soft Clock Types: This identifies how LATS should handle punches from the LATS Soft Clock. Options are: 1) Default – from soft clock tab to the timesheet. 2) Process as regular punch – sends soft clock punches through the lats_input_log for reporting purposes 3) Deny Soft Clock – does not display the soft clock tab. ***This option is for employees using a different type of hand reader or card reader punch clock.*
	Per Diem	Method of Recording OT: Options are Timesheet OT, Additional Time, *Overtime tab (no longer in use)*
	Per Diem	Min Hrs. Worked to Earn OT:
	Per Diem	Eligible to Earn Pass Days:
	Per Diem	HOP: This is for the old NYS Health Option Plan. ***This check box should **never** be checked.*
	Per Diem	Hours Per Day: Employees base hours per day. New employees will have the selected base hours per day as the default on the accruals page.
	Per Diem	AWS: If this is checked all employees with the annual pay basis will have the AWS check box checked and will be AWS by default. ***If this is checked*

		it will enable the Week 1/Week 2 drop downs.
	Per Diem	Week 1 Normal Hours: Options can be in between 35 – 40 in quarter hour increments.
	Per Diem	Week 2 Normal Hours: Options can be in between 35 – 40 in quarter hour increments.
	Per Diem	Allow Excess Vacation Balance: If checked the default page for annual employees will have the Allow Excess Vacation box checked.
	Per Diem	TDS By Percent: If this box is checked employees will be required to enter TDS time by percent worked on each task instead of hours.
	Per Diem	Comp Over 40 Eligible: If this is checked the employee will be expected to complete the required number of hours in the Comp Over 40 row of their timesheet before being eligible to earn OT.
	Per Diem	Enforce Punch Restriction: *No longer in use*. This was for a specific customer and allowed LATS to not allow the employee to punch in before their minimum shift start time identified on their shift.
	Per Diem	Accrue Non Comp: If checked employees with less than a 40 hour work week will have the earned non comp.
	Per Diem	Num of Weeks OT Applies: This field is enabled only if the Method of Recording OT is set the Additional Time. Options are 1 week and 4 weeks.
	Per Diem	Timesheet Validation: Employees will have the timesheet validation default set to Hrs./Day and AWS or Schedules. Validation set to

		Hrs. Per Day /AWS looks at the employees Hours Per Day or weekly expected total if AWS. If this is set to Schedules LATS will look at the employee rotation to determine expected work hours per day OR the admin schedule planner.
	Per Diem	Dynamic Employee Percent: This applies to seasonal (hourly) employees. The default page for annual employees will be set to Fixed or Dynamic based on this setting.
	Per Diem	Biweekly Total: This check box only applies to non OT eligible employees. If checked, LATS will look for the expected hours for the entire pay period to be met, not on a specific day or week.
	Per Diem	Previous Qualifying Pay Periods: The number of pay periods that an employee has in full pay status that are not in LATS.
	Per Diem	Total Qualifying Pay Periods: This is a calculated value that adds the number in the qualifying prior pay periods to the calculated number of qualifying pay periods in LATS.
	Per Diem	Week 1 Pass days: Check days are the default days off.
	Per Diem	Week 2 Pass days: Check days are the default days off.
	Per Diem	Freeze Vacation Earnings: Affects employees who change from FT to PT and are over the new PT max allowed vacation time.

Chapter 2: Code Maintenance

Topics Discussed In This Chapter:

- Audit Adjustment Codes
- Miscellaneous Leave Codes and Categories
- Misc. Payment Codes and Earnings Codes
- E-Mail Messages

Adjustment Codes

Adjustment codes are used when making adjustments to employees' leave accruals in LATS. Adjustment codes can be useful when running ad hoc reports to search for specific adjustment types.

Example

An employee receives a donation of leave from another employee. These accruals will be added to a specific miscellaneous leave code on the employee's accruals. As part of that adjustment, you will choose an adjustment code that will be Adjustment Codes Procedures.

Adjustment codes which are known to be used by all agencies are included in your LATS installation. These system adjustment codes cannot be changed or manipulated.
Many agencies, however, have created their own set of adjustment codes to meet the agency's needs. This section covers the procedures used to maintain your agency's agency-specific adjustment codes.

Creating an Adjustment Code

What you will need to create audit adjustment codes:
- A list of codes your agency needs that are not included in the installation. Each code should have a concise but clear explanation associated with it.
- Each code is associated with a narrative that explains the reason for the change to accruals.

To create a new adjustment code:

CODE MAINTENANCE > ADJUSTMENT CODES

Step#	Active Window	Actions
1	Home Page	
2	Code Maintenance	
3	Adjustment Codes	Click on the ADD tab.
4		Define the new adjustment code:
5		Reason Code: Enter a code you will use to identify the

		adjustment to the employee's accruals.
6		Description: Enter a concise but clear description of the reason for the adjustment.
7		Click SAVE.

Changing an Adjustment Code

On occasion, you will need to modify an existing audit code, either because a typographical error was made during its creation, or because the description has changed.
To modify an existing adjustment code:

CODE MAINTENANCE > ADJUSTMENT CODES

Step#	Active Window	Actions
1	Home Page	
2	Code Maintenance	
3	Adjustment Codes	Enter search criteria, select the Search button. LATS will search all of the Adjustment Code fields for a match on the entered criteria.
4		Search results are displayed. Click on the appropriate row to display Adjustment Code Details. LATS will display the Modify Tab.
5	Modify Tab	Make any necessary changes to the adjustment code.
6		Click SAVE.

Note: You cannot make any modifications to any system supplied codes.

The changes will be reflected anywhere this code is displayed; for instance, in an employee's accrual history window.

Deleting an Adjustment Code

If you find an adjustment code that has not been used and will not be used, you may delete that code.

CODE MAINTENANCE > ADJUSTMENT CODES

Step#	Active Window	Actions
1	Home Page	
2	Code Maintenance	
3	Adjustment Codes	Enter search criteria, select the Search button. LATS will

		search all of the Adjustment Code fields for a match on the entered criteria
4		Search results are displayed. Click on the appropriate row to display Adjustment Code Details. LATS will display the Modify Tab.
5	Modify Tab	Click the delete button.
6		Answer OK when you get the message asking if you want to delete the Adjustment Code.

Note: LATS will not allow you to delete an adjustment code which has been used.
Note: You cannot delete any system supplied codes.

Miscellaneous Leave Codes and Categories

To meet the needs of specific agencies, LATS provides each agency the capability to create and maintain its own list of Miscellaneous Leave Codes and Categories.
Miscellaneous leave codes allow employees to account for time when basic accrual charges do not provide required detail for time charged. Their use enables employees to accurately complete their timesheets.

Example 1

The employee has attended a training seminar. Although the employee is not at his/her work location, the employee is on agency business and is entitled to be paid for the time spent at the training seminar. The Miscellaneous Leave code chosen will complete the work schedule for the time spent at training will not charge employee accruals but will be included in accrual calculations.

Example 2

Employee is charging sick leave accruals but the agency requires employees to indicate sick leave is scheduled or unscheduled. The Miscellaneous Leave code chosen will charge sick leave accruals for this time and will allow agency to identify unscheduled sick leave.

Leave Without Pay (LWOP) and Lost Time must always be entered on the timesheet with a miscellaneous leave code. Using these codes will prevent the addition of accruals to a timesheet when the employee is not eligible to accrue time.

Example 3

The employee has exhausted accruals and has been placed on LWOP. The employee's timesheet must be completed with a code that indicates LWOP. The employee will not earn biweekly sick, annual, or personal leave accruals.

LATS groups miscellaneous leave codes into categories for reporting purposes; each miscellaneous leave code must be associated with a category.

Limits may be set for any category you create. Limits may be set by maximum usage, by calendar year and can be limited to either hours or days. When an employee has reached that number of hours/days or the maximum usage, no more charges can be added to any miscellaneous leave code within that category. If restriction is limited to calendar year, LATS will reset the maximum at the end of that period.

You may activate or de-activate individual leave codes within a category. You may also restrict their use to employees within specified negotiating units and codes may be restricted to allow only LATS administrators to use a specific code.

What you will need to create miscellaneous leave codes:

- A list of categories your agency will use to group miscellaneous leave codes. This list should include any categories your agency plans to use but categories can be added as required. Categories cannot be made inactive but codes within categories can be made inactive.

- The list should include a short code for each category, a short description, and, if the category is to be limited, a maximum number of hours/days for the category. Codes may be entered in both numeric and alpha form.

- A list of miscellaneous leave codes your agency will use.

Note: You cannot limit usage on a code; only categories may be limited.

This list should include any codes your agency plans to use but miscellaneous leave codes can be added to a category as required. The list should include the category with which the miscellaneous leave code is associated, a short description, the negotiating units whose employees may charge time to the code, and a short narrative which explains to employees the proper use of the miscellaneous leave code.

Miscellaneous Leave Procedures

Included in your LATS installation are miscellaneous leave categories and codes that have special meaning in LATS. These are known as system-defined miscellaneous leave categories and codes; you may add codes to system-defined categories.
System-defined Categories do not require accrual balances. Limits will be imposed based on availability of accruals for the category.

Example

Vacation will be limited to the number of hours the employee has accrued in Vacation balance; Earned Non Comp will be limited to the number of hours the employee has accrued in Earned Non Comp balance.

Usage type is always in hours; there are no Max Usage limits or Calendar year cutoffs.

If you require limits on a Category, you must create a new category and define the limits within the new category. These Categories are designated as "Agency-Defined."

Example

You want to limit the amount an employee may charge to FMLA. You must create a new Agency Category, defining the limits within the new Category. You may change the association of the existing code (previously associated with the System Category) to associate with the new category you created or you may create a new code.

Miscellaneous Leave Categories

Display Miscellaneous Leave Categories

CODE MAINTENANCE > MISC LEAVE CODES > CATEGORIES

Step #	Active Window	Action
1	Home Page	
2	Code Maintenance	
3	Misc. Leave Codes	
4	Categories	Enter search criteria, select the Search button. LATS will search the Category Name, Description, Counts toward Full Pay and System Category fields for a match on the entered criteria. (clicking search with no criteria will return all codes)
5		Search results are displayed. Click on the appropriate row to display Category Details. LATS will display the Modify Tab.
6		To sort the codes by System Categories click on the System Category link on the System Category column.
7		This will group the codes by System and Non System Categories

Creating a Miscellaneous Leave Category

CODE MAINTENANCE > MISC LEAVE CODES > CATEGORIES

All miscellaneous leave charge codes must be associated with a miscellaneous leave category.
The categories allow agencies to group codes for reporting purposes.
To add a miscellaneous leave category for your agency:

Step #	Active Window	Actions
1	Home Page	
2	Misc. Leave Codes	
	Categories	Click on the Add tab
3		Category Name - Enter the name of the new category (10 character maximum)
4		Description -Enter a description for the category.
5		Counts toward Full Pay Status - Select Yes or No. (See Note 1)
6		Balance Required - Select Yes or No. If set to YES, the remaining fields will not apply and will be grayed out. (See Note 2)
8		Usage Type - Hours or Days. A day is 7.50 or 8 hours, depending on the Employee's normal hours.
9		Max Hours per Occurrence - The number of hours or days an employee may use for one instance of this category, even if no Max Usage exists.
10		Max Usage: The total number of hours or days the employee may use within the period designated in Usage Cut Off.
11		Usage Year Type - Select Calendar Year or Fiscal Year
12		Usage Cut Off (Calendar Year): Enter number of years if applicable.
		Select the agencies that are allowed to use misc. leave

		codes that are attached to the misc. leave category.
13		Click Add.

Example

Employee attends a retirement party and is allowed one hour extra without charge, but there is no limit on how many retirement parties the employee may attend in a year. Enter 1 in Max Hours per Occurrence but do not enter a Max Usage.

Example

Agency sponsored Christmas Party is limited to 4 hours each year. Enter 4 in Max Usage, 1 in Usage Cut off and choose Hours in Usage Type. If an amount is entered in Max Usage, an entry in the Usage Cut Off field is required.

Note 1: Miscellaneous leave categories may or may not count towards full pay status. Employee will not receive biweekly accruals if timesheet does not meet full pay status requirements. This designation should be decided before the new category is added.

Note 2: If Balance Required is set to YES, all additional fields (Usage Type, Max Hours per Occurrence, etc.) will be disabled. Leave codes associated with this category will only be available to employees with a category balance. An administrator must add that balance to the employee's miscellaneous leave. All additional fields, Usage type, Max hours per occurrence, and others, will be disabled if set to YES.

Changing a Miscellaneous Leave Category

You may change the attributes of any agency-defined miscellaneous leave category. You may not change the code attribute or any attribute of a system-defined category.

To change an Agency-Defined Miscellaneous Leave Category:

CODE MAINTENANCE > MISC LEAVE CODES > CATEGORIES

Step #	Active Page	Action
1	Home Page	
2	Code Maintenance	
3	Misc. Leave Codes	
4	Categories	Enter search criteria, select the Search button. LATS will search the Category Name, Description, Counts toward Full Pay and System Category fields for a match on the entered criteria.

		(clicking search with no criteria will return all codes)
5		Search results are displayed. Click on the appropriate row to display Category Details. LATS will display the Modify Tab.
6	Modify Tab	Modify as necessary
7		Click Save

Deleting a Miscellaneous Leave Category

You may delete a miscellaneous leave category only when the category has no miscellaneous leave codes associated with it. If a category has a miscellaneous leave code connected to the category you will receive this message: "This Misc. Leave category record has misc. lv codes attached to it. Cannot delete".

CODE MAINTENANCE > MISC LEAVE CODES > CATEGORIES

To delete a miscellaneous leave category:

Step #	Active Page	Action
1	Home Page	
2	Code Maintenance	
3	Misc. Leave Codes	
4	Categories	Enter search criteria, select the Search button. LATS will search the Category Name, Description, Counts toward Full Pay and System Category fields for a match on the entered criteria. (clicking search with no criteria will return all codes)
5		Search results are displayed. Click on the appropriate row to display Category Details. LATS will display the Modify Tab.
6	Modify Tab	Select DELETE
7		The warning "Are you sure you want to delete this record?" will be displayed.
8		Click OK to confirm.

Miscellaneous Leave Charge Code

Creating a Miscellaneous Leave Charge Code

A miscellaneous leave code is an item against which an employee can charge time. All miscellaneous leave codes must be associated with a miscellaneous leave category. If you need to create a new category for the miscellaneous leave code you want to create, see Creating a Miscellaneous Leave Category.

There are two ways to navigate through the process of adding a Miscellaneous Leave Code. The first way is by searching and selecting a category and the second way is by going to the Misc. Leave Charge Code menu option.

The work flow described below adds the Misc. Leave Code from the Misc. Leave Category.

Add a Miscellaneous Leave Code

CODE MAINTENANCE > MISC LEAVE CODES > Charge Codes

Step #	Active Window	Action
1	Home Page	
2	Code Maintenance	
3	Misc. Leave Codes	
4	Charge Codes	Select the Add Tab and enter the following data:
5		Misc. Leave Charge code (10 character maximum): This code will be viewed and chosen by the employee from the drop-down list of codes.
6		Code Description: This will be viewed by employees under "View Description".
7		Is Active: Click in this box to make the new code active.
8		Time Records: Click in this box if you want to limit access to this Misc. Leave code to authorized administrative employees.
9		Narrative: Enter information if appropriate. Employees may view this information under View Description.
10		Negotiating Units: LATS defaults to unchecked. Checked boxes will allow employees in those Negotiating Units to use this

		code on the timesheet (within category designated limits).
		Enhanced FMLA functionality: If this is checked and the system Enhanced FMLA config setting is turned ON, LATS will deduct time charged against this code from the available FMLA balance.
		Enhanced Not Full Pay functionality:
		Enhanced Overtime functionality: If this is checked, and the Use Enhanced OT is turned ON for the Negotiating Unit, LATS will convert any voluntary OT to straight time depending on the number of hours of unscheduled sick and voluntary OT hours.
		Enhanced Workers Comp functionality: If this is checked, LATS will apply time charged to this leave code to the appropriate Worker Compensation case.
11		Click ADD

Note: Active leave codes that are not restricted to HR or administrative use and that are available to the employee's negotiating unit, will be displayed on the drop-down list in the leave field on the front of the employee timesheets or on the Misc. leave tab. Codes will be displayed in numerical/alphabetical order.

Changing a Miscellaneous Leave Code

CODE MAINTENANCE > MISC LEAVE CODES > Charge-Codes

You may change any of the attributes of a miscellaneous leave charge code. Changes are not retroactive; timesheets will reflect the attributes of miscellaneous codes active when the timesheets are processed.

Step #	Active Window	Action
1	Home Page	
2	Code Maintenance	
3	Misc. Leave Categories	

4	Charge - Codes	Enter search criteria, select the Search button. LATS will search the Active, Code, Category, Description and Time Record fields for a match on the entered criteria. (Clicking search with no criteria will return all codes).
5		Search results are displayed. Click on the appropriate row to display Charge Code Details. LATS will display the Modify Tab.
6	Modify Tab	Make any necessary changes. You may make a charge code "inactive" on this screen.
7		Click SAVE.

Deleting a Misc. Leave Code

CODE MAINTENANCE > MISC LEAVE CODES > Charge-Code

You may only delete miscellaneous leave charge codes which are unused. After any employee has charged any time to a particular miscellaneous leave charge code, you will not be able to delete that charge code. You will be able to make the code inactive, preventing further use by employees. See "Changing a Miscellaneous Leave Code".

To delete a miscellaneous leave charge code:

Step #	Active Window	Action
1	Home Page	
2	Code Maintenance	
3	Misc. Leave Categories	
4	Charge -Code	Enter search criteria, select the Search button. LATS will search the Active, Code, Category, Description and Time Record fields for a match on the entered criteria. (Clicking search with no criteria will return all codes).
5		Search results are displayed. Click on the appropriate row to display Charge Code Details. LATS will display the Modify Tab.
6	Modify Tab	Click DELETE.

7		The warning "Are you sure you want to delete this record?" will display.
8		Click OK to confirm.

Miscellaneous Payment Codes and Earnings Codes

LATS implements payment codes to allow agencies to record time and payments for specific conditions or reasons. Your system may already have this information included when you start on LATS. Payments are recorded on the "Payment" tab of the timesheet. If your organization does not use the payment function, the tab will be disabled: it will not appear on employee timesheets.

Payment Codes

Creating Agency-Specific Miscellaneous Payment Codes

Miscellaneous payment codes allow your agency to track miscellaneous payments and generate the required PayServ record for each payment.

What you will need to create miscellaneous payment codes:

- A list of all miscellaneous payment codes in use by your agency and the corresponding PayServ earning code with which it is associated.
- For each code, an indication whether the payment is available to all members of one or more negotiated units or whether it is available to specific individuals, specific titles or specific item numbers. You will also need lists of the specific employees, titles, and item numbers if required.
- For each earnings code, create an earnings code record.
- For each payment code which is available to all members of one or more negotiating units, create a payment code with a negotiating unit specified.
- For each payment code which is available only to specific individuals, titles and/or item numbers, create a payment code with no negotiating unit specified.
- A payment code available only to specific individuals, titles or item numbers requires a payment roster, which is a named list containing the names of employees, titles or item numbers authorized to receive this payment. For each payment code of this type, create a payment roster.
- After the payment roster is created, you must indicate the individuals, titles or item numbers that will be authorized to receive the payment associated with the roster.
- An earnings code is used to link your agencies allowed miscellaneous payments with a payroll system, PayServ for example.

Creating a Payment Code

Payment codes are used to create an association between your agency's internal pay codes with the earnings codes used by PayServ.

CODE MAINTENANCE > MISC PAYMENT CODES > PAYMENT CODES

To create a payment code:

Step#	Active Window	Action
1	Home Page	
2	Code Maintenance	
3	Misc. Payment Codes	
4	Payment Codes	Click on the Add tab.
5		Payment Code: Add the numeric Payment Code.
6		Earnings Code: Select the appropriate Earnings Code from the dropdown.
7		Description: Enter description.
8		Payable: Yes or No. Set this to Yes if this item will be payable.
9		Active: Yes or No. If this payment code is to be used now set the Active flag to Yes.
10		Hrs. Per Day: Options are All, 7.00, 7.50 and 8.00. If you limit the code to a certain number of hours per day only employees that are configured with that many hours per day will be allowed to access and use the code.
11		Pay Basis: All employees, Annual Employees or Hourly Employees. If you limit the code to a certain Pay Basis, only employees that are configured with that Pay Basis will be allowed to access and use the code.
12		OT Eligible: Options are OT Eligible Only, Non OT Eligible and ALL
13		Amount Type: Select Days, Hours or Units depending on how the code should be paid.
14		Min Amount: Minimum amount due to an employee when using this payment code. For example, an employee may be called in

		and work 15 minutes but if the Min Amount is set to 3.75, the employee will get 3.75 hours of OT.
15		Max Amount: The maximum amount an employee can be paid when using this payment code.
		Additional Fields
16		Comp Time Affected: If this is checked then hours charged in this payment code must be reconciled on the face of the timesheet.
17		TDS Affected: If this is checked the time charged to this payment code must be reconciled with the TDS tab.
18		Time Required: If this is checked the Begin/End Time will be in red font on the payment tab and must be filled in.
19		Comment Required: If this is checked the Comment label will be in red font and a comment must be entered.
20		Holiday Use Only: If checked, allows only use of the payment code on a holiday.
21		Pass day Use Only: If checked, allows only use of the payment code on a pass day.
22		Payable Immediately: Indicates there are no minimum hours worked criteria to be eligible for this payment. Applies to NYSP only.
23		Contiguous: If check the code may be used contiguous to another payment code.
24		Overlap Days: Allows the payment code to be used across 12 midnight.

25		Min Hrs. Worked: Minimum hours that must be worked in order to use a payment code.
26		Validate Work Time: If this is checked the Start/End Work Time entries are required and LATS will not allow the payment code to be used outside of those stated hours.
27		Enter Start Work Time: The payment code cannot be used before the Start Work Time. ***Required if the Validate Work Time is checked.*
28		End Work Time: The payment code cannot be used after the End Work Time. ***Required if the Validate Work Time is checked.*
29		Claim Meal Allowance: Identifies whether employees can claim meals when using the payment code.
30		Enforce Quarter Hour Time: Requires time entry in quarter hour time.
31		Narrative
32		Negotiating Units: Negotiating Units that are allowed access to the payment code.
		Agencies: Agencies that are allowed access to the payment code.
33		Select Add

Define the new payment code. An explanation of payment fields may be accessed by clicking on Click for Help at the top right of this screen.

Note: Payment code types usually match the earnings code type with the exception of Days. If the payment code is set to hours, but the earnings code is set to days, LATS will convert the hours entered into days when sending to HRIS or PayServ.

Changing a Payment Code

If changes to a payment code are required, follow this procedure:

CODE MAINTENANCE > MISC PAYMENT CODES > PAYMENT CODES

Step#	Active Window	Action
1	Home Page	
2	Code Maintenance	
3	Misc. Payment Codes	
4	Payment Codes	Enter search criteria, select the Search button. LATS will search the Payment Code, Earnings Code, description, Active, Time Required, OT Eligible, Pay Basis and Pass day Only fields for a match on the entered criteria. (Clicking search with no criteria will return all codes).
5		Search results are displayed. Click on the appropriate row to display Payment Code Details. LATS will display the Modify Tab
6	Modify Tab	Make any necessary changes. You may make a payment code "inactive" on this screen.
7		Click SAVE.

Deleting a Payment Code

If you need to delete a payment code, follow this procedure:

CODE MAINTENANCE > MISC PAYMENT CODES > PAYMENT CODES

Step#	Active Window	Action
1	Home Page	
2	Code Maintenance	
3	Misc. Payment Codes	
4	Payment Codes	Enter search criteria, select the Search button. LATS will search the Payment Code, Earnings Code, description, Active, Time Required, OT Eligible, Pay Basis and Pass day Only fields for a match on the entered criteria. (Clicking search with no criteria will return all codes).
5		Search results are displayed. Click on the appropriate row to display Payment Code Details. LATS will display the Modify Tab.
6	Modify Tab	Click DELETE.
7		If the payment code has never been used, the system will delete it. *If the*

		payment code has been used, the system will not allow you to delete the code.

Note: The system will not allow you to delete a payment code which has been used. If a payment code is no longer active but has been used in the past, follow the procedure in Changing a Payment Code and make the payment code inactive.

Earnings Codes

Creating an Earnings Code

The Earnings Code must be created prior to the creation of a payment code because the Earnings Code populates one of the dropdowns on the Payment Code configuration page.

To Create an Earnings Code:

CODE MAINTENANCE > MISC PAYMENT CODES > EARNINGS CODES

Step#	Active Window	Action
1	Home Page	
2	Code Maintenance	
3	Misc. Payment Codes	
4	Earnings Codes	Click on the ADD tab.
5		Code: Enter the PayServ earnings code. This must match an existing PayServ earnings code or any transactions reported will be rejected.
6		Description: Enter a concise but clear description of the use of this earnings code. (30 character limit)
7		Usage: Defaults to M. This indicates that the code is submitted via miscellaneous payments. LATS only allows earnings codes that can be submitted via miscellaneous payments.
8		Type: Select the type of earnings (hours/days/units) from the drop-down list. This should match entry option on PayServ.
9		Roll up: Choose PERIOD or DATE from the drop-down list. LATS defaults to PERIOD. If set to PERIOD, overtime will be transferred to OSC in a range of dates, beginning with the earliest date of payment and ending with the last day of that payment within the period and with a total count for each

		period. If set to DATE, instances of payment or additional time will be reported separately for each day.
10		Verification required: LATS defaults to NO. If set to YES, all instances of overtime that fall in this earnings code will have to be verified by the authorizing supervisor.
11		Counts Toward Paid OT: LATS defaults to NO. If set to NO, miscellaneous payments entered on the Additional/Payment tab will not be included in hours entered on the face of the timesheet. *Example 1: IIP requires unit entry on PayServ; Units must be chosen in the earnings type. Holidays are entered in days on PayServ; Days must be chosen in the earnings type.* Example 2: An employee works on a holiday, enters the hours worked on the face of the timesheet and enters payment for the holiday on the Additional Time tab. Total hours for the week will not be increased by the entry on the Additional Time tab because the payment is set to NO (does not count toward paid OT). If set to Yes, any hours entered on the Additional Time tab will be included in timesheet calculations.
12		Conversion Factor: It is used in LATS when payments are generated - when a payment code is set to hours, but the earnings code is Days. If the value is zero (default, and most often the case), LATS will use the employee's

		hrs_per_day to convert the hours to decimal days (as always); If it's filled in, LATS will use the value entered to convert hours to decimal days.
13		Click SAVE.

Note: If PayServ entry requires days or decimal days, earnings type should be set for days. If PayServ requires an entry that will never be converted to days, earnings type should be set to Units.

Changing an Earnings Code

On some occasions, due to possible typographical errors or changing conditions with contracts, it may become necessary to change the definition of an earnings code in your installation.

To change an earnings code:
CODE MAINTENANCE > MISC PAYMENT CODES > EARNINGS CODES

Step#	Active Window	Action
1	Home Page	
2	Code Maintenance	
3	Misc. Payment Codes	
4	Earnings Codes	Enter search criteria, select the Search button. LATS will search the Code, Description, Usage, Type, Roll-up, Verification Required, and Counts toward Paid OT fields for a match on the entered criteria. (Clicking search with no criteria will return all codes).
5		Search results are displayed. Click on the appropriate row to display Earnings Code Details. LATS will display the Modify Tab.
6	Modify Tab	You can modify: Description, Type, Roll Up, Verification, Counts Towards Paid OT or Conversion Factor.
7		Click SAVE.

Deleting an earnings code:

CODE MAINTENANCE > MISC PAYMENT CODE > EARNINGS CODES

When it is necessary to delete an earnings code, follow this procedure:

Step#	Active Window	Action
1	Home Page	
2	Code Maintenance	

3	Misc. Payment Codes	
4	Earnings Codes	Enter search criteria, select the Search button. LATS will search the Code, Description, Usage, Type, Roll-up, Verification Required, and Counts toward Paid OT fields for a match on the entered criteria. (Clicking search with no criteria will return all codes).
5		Search results are displayed. Click on the appropriate row to display Earnings Code Details. LATS will display the Modify Tab.
6	Modify Tab	Click delete.
7		If the earnings code has never been used, the system will delete it. *If the payment code has been used, the system will not allow you to delete the code.*

Note: If the earnings code has never been used, the system will delete it. If the earnings code has been used, the system will not allow you to delete the code.

Payment Roster

Creating a Payment Roster

A payment roster designates the type of payment that will be made available to a specific employee, title or item, (Examples: SBC-Standby on Call, IIP-Intermittent Inconvenience Pay) or it may designate a bureau or section in the agency, (Examples: Utilities, Human Resources). Multiple payment codes may be assigned to a payment roster. Roster Details are used to assign a payment code(s) to a list of employees, items or titles. Using payment rosters, you are able to change the payment code for a particular miscellaneous payment without having to adjust the individual records for each employee who is eligible to receive that type of payment.

Before you can create a payment roster, the payment code with which it will be associated must exist. If it does not, see Creating a Payment Code.

To create a payment roster:

CODE MAINTENANCE > MISC PAYMENT CODES > PAYMENT ROSTERS

Step#	Active Window	Action
1	Home Page	
2	Code Maintenance	

3	Payment Codes	
4	Payment Rosters	Click on the ADD tab.
5		Roster Name: enter a user-defined name for the payment roster.
6		Effective Begin Date: Click the Calendar and from the Calendar page select the first day on which individuals can use the payment code associated with this payment code.
7		Effective End Date: Click the Calendar and from the Calendar page select the last day on which individuals can use the payment code associated with this payment roster. Leave this field blank if open-ended.
8		Roster Type: select Employee, Item or Title
9		Payment Code: From the Available Payment Code list, select the payment code(s) associated with the selected payment roster, click the > to move the codes to the "Selected Payments Code" box. If multiple codes are required, select multiple codes by holding down the Shift key and selecting enter.
10		Codes can be removed from the “Selected Payment Codes” box by selecting the code and selecting the < symbol.
11		Click SAVE.

Copy a Payment Roster
You may also copy a payment roster.

Example

A roster is set up for the year 2004-2005. This roster may be extended by copying the 2004-2005 Roster and extending the dates. Employees, items or titles assigned to the original roster will automatically be assigned to the copied roster.

Note: When copying a roster, available rosters will display in the drop-down list based on "Roster Type" chosen. A roster may not be deleted if any employees/items/titles are assigned to that roster. A message will be displayed at the top of the page, above the Payment Code drop-down list, indicating the roster has details and cannot be deleted.

To copy a payment roster:

CODE MAINTENANCE > MISC PAYMENT CODES > PAYMENT ROSTERS

Step#	Active Window	Action
1	Home Page	
2	Code Maintenance	
3	Payment Codes	
4	Payment Rosters	Click on the ADD tab.
5		Click on Copy Payment Roster Button.
6		Select the Roster Type to copy from
7		Select the Roster Name to copy from
8		Enter the Target Roster Name
9		Enter the Target Effective Begin Date:
10		Enter the Target Effective End Date.
11		Click SAVE.

Creating Roster Details

Roster Details allows you to specify individuals who are eligible to use a particular Payment Roster.

To create Roster Details:

CODE MAINTENANCE > MISC PAYMENT > PAYMENT ROSTERS

Step#	Active Window	Action
1	Home Page	
2	Code Maintenance	
3	Payment Codes	
4	Payment Rosters	Enter search criteria, select the Search button. LATS will search the Roster ID, Roster Name, Effective Begin Date, Effective End Date, and Roster Type fields for a match on the entered criteria. (Clicking search with no criteria will return all codes).

5		Search results are displayed. Click on the appropriate row to display Earnings Code Details. LATS will display the Modify Tab.
6		
7		If Employee type roster is chosen, click ADD EMPLOYEE TO ROSTER. If Item type roster is chosen, click ADD ITEM TO ROSTER. If Title type is chosen, click ADD TITLE TO ROSTER.
8		Employee Name: Click "Search" and from the Employee search window select the name of the individual to assign to the selected payment roster.
9		Effective Date: Click the Calendar and from the Calendar page select the first day on which the individual can use the payment code associated with the selected payment roster.
10		Click SAVE.

Note: If you are adding an item number or a title to a roster, follow the procedure detailed above but add the desired item number to the "Item Number" field or the desired title to the "Title Code" field (click drop-down list and choose title). Any employees in the corresponding items or titles will be dynamically linked to the roster.

Removing a Roster Detail

When circumstances change which make an employee no longer eligible for a particular type of miscellaneous payment, you will need to remove that employee/item/title from the payment roster.

To remove an employee from the payment roster:

CODE MAINTENANCE > MISC PAYMENT CODES > PAYMENT ROSTERS

Step#	Active Window	Action
1	Home Page	
2	Code Maintenance	
3	Payment Codes	

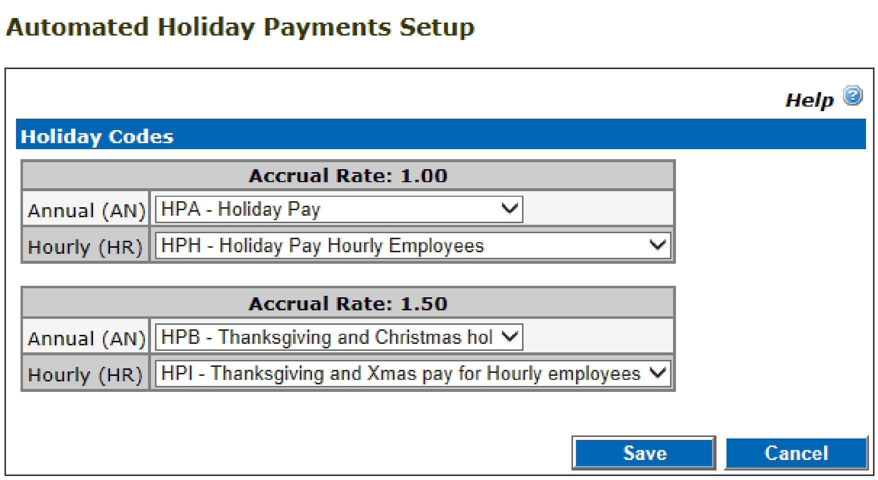
4	Payment Rosters	Locate the Payment Roster where you want to delete an employee, item, or title.
5		Click appropriate Roster Detail for that roster. LATS displays the Modify Payment Roster Details window.
6	Modify Payment Roster tab	Click DELETE.
7		A message "Are you sure you want to delete this record?" will be displayed. Click OK to confirm.

Note: If you want to delete an item number from a Roster, follow procedures above but on the Roster Details screen choose Item from the drop-down list. Screen will re-display with item numbers highlighted in blue. Click the Item number. Payment Roster Detail (Item Roster (edit)) screen will be displayed, click DELETE. "Are you sure you want to delete this record?" will be displayed. Click OK to confirm. If you want to delete a Title from a Roster, follow procedures above but choose Title from the drop-down list.

Auto Holiday Payments

LATS contains functionality that allows auto-generation of holiday payments if the system is configured properly. This is a multi-step configuration process. There is a main configuration setting that must first be enabled: Configuration Settings> Payments> AutoGenerateHolidayPayments.

Once the main configuration setting is enabled there are configurations that need to be set up under Code Maintenance> Misc. Payment Codes> Auto Holiday Codes. Selecting this option will open the configuration page seen below:



Once all configurations are complete, the employee's timesheets will be populated with the appropriate holiday payment code as displayed in the screenshots below.

Note: The auto-payment is not added to the payment tab until <u>after</u> the HOL is removed from the timesheet.

Supervisor: TRICIA TEETER
FY: 2015 - 15 (10/8/2015 to 10/21/2015)
Work Location: 27 West 23rd

Name: HELEN HOURLY
Vacation: 1/1/2007
Personal: 1/1/2007
Schedule: *Default Rotation*

Status: Un-Submitted
Submitted Date:
Approved Date:

Day: *Select Go to Day* | < Prev | 10/08/2015 | Next > | Go | Save

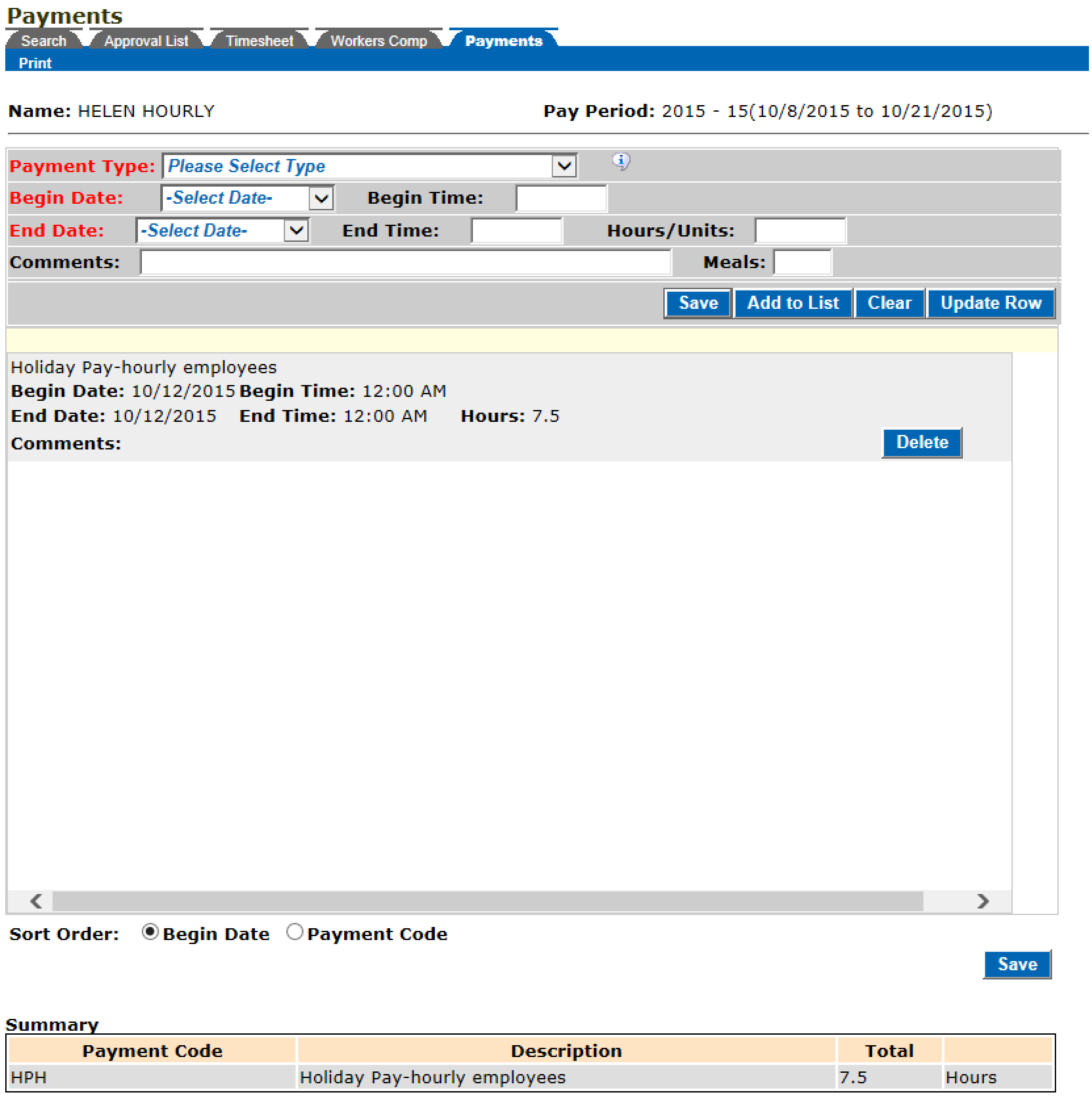
Overdue Timesheets(48)
Holiday - 10/12/2015
Misc. Payments/Additional Time Exist (Unapproved)

Extras	10/8 Thu	10/9 Fri	10/10 Sat	10/11 Sun	10/12 Mon	10/13 Tue	10/14 Wed	10/15 Thu	10/16 Fri	10/17 Sat	10/18 Sun	10/19 Mon	10/20 Tue	10/21 Wed	
Day In	7:00 AM				7:00 AM	7:00 AM							7:00 AM	7:00 AM	Day In
Lunch Out	12:00 PM				12:00 PM	12:00 PM							12:00 PM	12:00 PM	Lunch Out
Lunch In	12:30 PM				12:30 PM	12:30 PM							12:30 PM	12:30 PM	Lunch In
Day Out	3:00 PM				3:00 PM	3:00 PM							3:00 PM	3:00 PM	Day Out
Paid comp (overtime)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Paid comp (overtime)
Vacation	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Vacation
Sick-regular	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Sick-regular
Sick-family	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Sick-family
Personal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Personal
NonComp	0	0	0	0	0	0	0	0	0	0	0	0	0	0	NonComp
Time Worked	7.50	0	0	0	7.50	7.50	0	0	0	0	0	0	7.50	7.50	Time Worked
Charges	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Charges
Total Time	7.50	0	0	0	7.50	7.50	0	0	0	0	0	0	7.50	7.50	Total Time
Additional Time	0	0	0	0	7.50	0	0	0	0	0	0	0	0	0	Additional Time
	10/8 Thu	10/9 Fri	10/10 Sat	10/11 Sun	10/12 Mon	10/13 Tue	10/14 Wed	10/15 Thu	10/16 Fri	10/17 Sat	10/18 Sun	10/19 Mon	10/20 Tue	10/21 Wed	

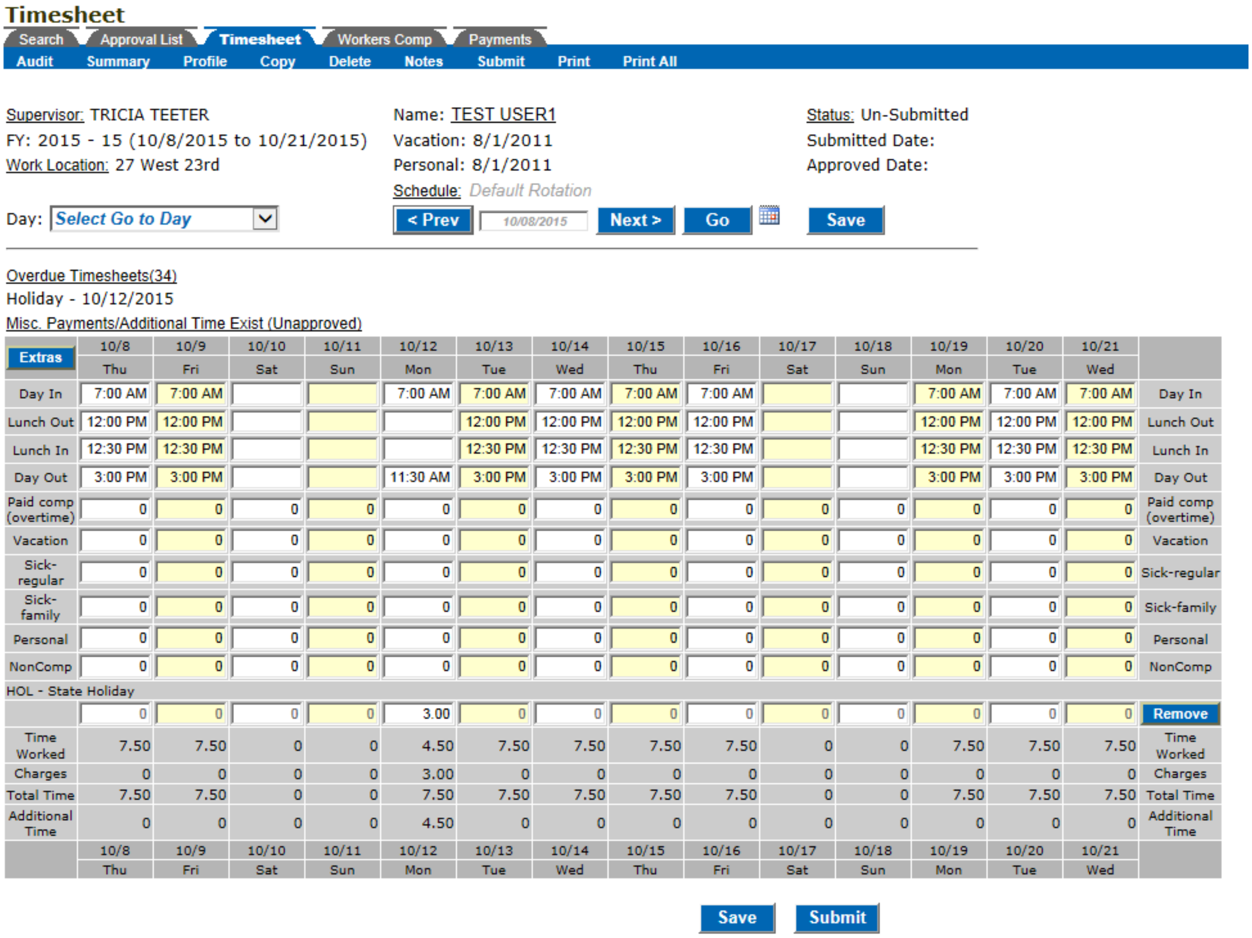
Save | Submit

Leave: Select leave | Add Leave Category

Below is the auto-payment that was added to the Payment tab for the employee.



There is logic built into LATS that adds the appropriate number of hours worked on a holiday when a partial day was worked as well. Notice in the screenshot below the employee worked 4.50 hours on the holiday and claimed 3.00 hours in the HOL row. LATS created an auto-holiday payment for the 4.50 hours worked on the holiday.



Timesheet

Search | Approval List | Timesheet | Workers Comp | Payments

Audit | Summary | Profile | Copy | Delete | Notes | Submit | Print | Print All

Supervisor: TRICIA TEETER
FY: 2015 - 15 (10/8/2015 to 10/21/2015)
Work Location: 27 West 23rd

Name: TEST USER1
Vacation: 8/1/2011
Personal: 8/1/2011
Schedule: Default Rotation

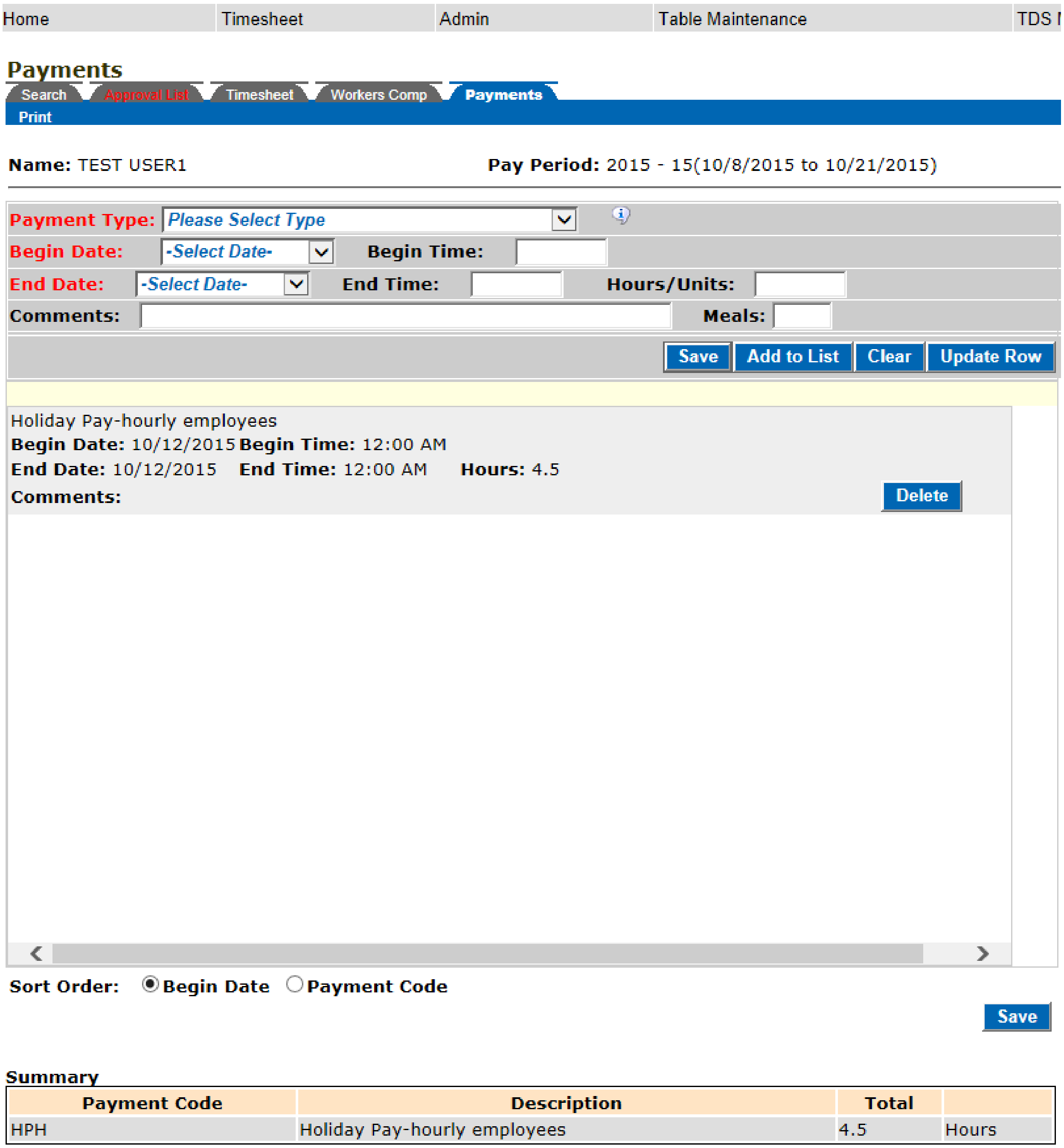
Status: Un-Submitted
Submitted Date:
Approved Date:

Day: Select Go to Day   < Prev   10/08/2015   Next >   Go   Save

Overdue Timesheets(34)
Holiday - 10/12/2015
Misc. Payments/Additional Time Exist (Unapproved)

Extras	10/8 Thu	10/9 Fri	10/10 Sat	10/11 Sun	10/12 Mon	10/13 Tue	10/14 Wed	10/15 Thu	10/16 Fri	10/17 Sat	10/18 Sun	10/19 Mon	10/20 Tue	10/21 Wed	
Day In	7:00 AM	7:00 AM			7:00 AM	7:00 AM	7:00 AM	7:00 AM	7:00 AM			7:00 AM	7:00 AM	7:00 AM	Day In
Lunch Out	12:00 PM	12:00 PM				12:00 PM	12:00 PM	12:00 PM	12:00 PM			12:00 PM	12:00 PM	12:00 PM	Lunch Out
Lunch In	12:30 PM	12:30 PM				12:30 PM	12:30 PM	12:30 PM	12:30 PM			12:30 PM	12:30 PM	12:30 PM	Lunch In
Day Out	3:00 PM	3:00 PM			11:30 AM	3:00 PM	3:00 PM	3:00 PM	3:00 PM			3:00 PM	3:00 PM	3:00 PM	Day Out
Paid comp (overtime)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Paid comp (overtime)
Vacation	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Vacation
Sick-regular	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Sick-regular
Sick-family	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Sick-family
Personal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Personal
NonComp	0	0	0	0	0	0	0	0	0	0	0	0	0	0	NonComp
HOL - State Holiday															
	0	0	0	0	3.00	0	0	0	0	0	0	0	0	0	Remove
Time Worked	7.50	7.50	0	0	4.50	7.50	7.50	7.50	7.50	0	0	7.50	7.50	7.50	Time Worked
Charges	0	0	0	0	3.00	0	0	0	0	0	0	0	0	0	Charges
Total Time	7.50	7.50	0	0	7.50	7.50	7.50	7.50	7.50	0	0	7.50	7.50	7.50	Total Time
Additional Time	0	0	0	0	4.50	0	0	0	0	0	0	0	0	0	Additional Time
	10/8 Thu	10/9 Fri	10/10 Sat	10/11 Sun	10/12 Mon	10/13 Tue	10/14 Wed	10/15 Thu	10/16 Fri	10/17 Sat	10/18 Sun	10/19 Mon	10/20 Tue	10/21 Wed	

Save   Submit



E-Mail Messages

You will have the option on LATS of choosing from several e-mail messages available.
E-mail messages are configurable and your agency may choose to use all, some or none of the e-mail messages available. In addition, the verbiage of the e-mail message and the recurrence of the messages may be modified.

E-mail messages may be modified but they may not be added or deleted. You may make an e-mail message inactive by choosing "not specified" in the drop-down list for "Perform this task".

The following e-mail messages are currently available:

- **#1 Timesheet Submission:** This e-mail will be sent to a supervisor each time one of the supervisor's direct reports submits a timesheet for approval.

- **#2 Supervisor Change:** This e-mail is used by agencies that allow employees to choose their own supervisor on the timesheet. E-mail is sent to the old supervisor to notify him/her of the change.

- **#3 Supervisor Select**: This e-mail is used by agencies that allow employees to choose their own supervisor on the timesheet. E-mail is sent to the new supervisor to notify him/her of the change.

- **#4 Overdue Time Sheets:** This e-mail will be sent to employees that have not submitted timesheets for one or more period.

- **#5 Approval Overdue Time Sheets:** This e-mail will be sent to a supervisor who has not approved employee timesheets for a period designated by the agency.

- **#6 Unapprove Time Sheets:** This e-mail will be sent to an employee when a supervisor unapproves the employee's timesheet. A message may be sent with the e-mail by filling in the field provided, but a message is not required for this e-mail to be sent.

- **#7 Unsubmit Time Sheets:** This e-mail will be sent to an employee when a supervisor unsubmits the employee's timesheet. A message may be sent with the e-mail by filling in information in the field provided, but a message is not require for this e-mail to be sent.

- **#8 Notify Supervisor:** This e-mail will be sent when a soft clock user clicks on the Notify Supervisor button on the soft clock to have request a punch time change request.

- **#9 Forgot Password:** This e-mail is generate when the Forgot Password configuration setting is enabled on the homepage. LATS will auto-generate a temporary password that meets the password rules criteria and send it to the e-mail on file for the employee.
-
- **#10 Schedule Change:** This e-mail is generated when an employee changes their schedule and the configuration settings that allow employees to modify their schedule is enabled.

Note: An error message will be displayed if the mail address is not filled in. If the error is received, you should contact your Account Manager. If you are currently using the Overdue Timesheet e-mail, this address will already be filled in.

After you choose which e-mail you want enable, you should contact your administrator at CMA to activate the messages you want to use.

Chapter 3: Rules Maintenance

Topics Discussed In This Chapter:

- State Holidays
- Personal Leave Accrual Rules
- Sick Leave Accrual Rules
- Vacation Leave Accrual Rules
- VRWS Accruals
- Pass days
- Seasonal Hours
- Academic Year

State Holidays

This procedure provides a way to check and if necessary to correct, the settings for each state holiday in your LATS installation.

What you will need to check state holidays:

- A list of all state holidays for the remainder of the current fiscal year and for the next fiscal year.
- For each holiday, an indication of whether the holiday is, or is not, a floating holiday.
- For each holiday, an indication of whether the holiday falls on a Saturday.
- For each holiday, an indication of whether this holiday qualifies as a holiday that allows veterans and/or former reservists to earn holiday time for the hours worked on this day.
- The expiration date for both floating holidays and regular holidays.

To check the state holidays in your system:

1. From your Home Page, RULE MAINTENANCE > HOLIDAYS. The State Holidays Maintenance window will display. The holidays are displayed in chronological order, with the most recent holiday displayed at the top of the list.
2. In the Fiscal Year field, make sure the current fiscal year is selected from the drop-down list.
3. For each holiday on your list:
   a. Ensure that the holiday is present; if it is not, see "Creating a State Holiday”
   b. Ensure that the date and description for the holiday is correct; if it is not, see "Changing a State Holiday"
   c. Ensure that the holiday's floater designation is correct; if it is not, see "Changing a Holiday's Floater Designation"
   d. If the holiday falls on a Saturday, ensure the designation is correct.
   e. For each holiday, an indication of whether this holiday qualifies as a holiday that allows Veteran's and/or Former Reservists to earn holiday time for the hours worked on this day.
   f. If a holiday is listed in the system but not on your list, see "Deleting a State Holiday".

Maintenance of State Holidays

RULE MAINTENANCE > HOLIDAYS

Step #	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Holidays	Click on the appropriate Fiscal Year or leave it at the default value of ALL.
4		Click on the holiday you wish to edit.
5		Make the appropriate changes to: Description, Veteran Rule, and Former Reservist Rule. For Each applicable Negotiating Unit make the appropriate changes to: Floater status, Expiration Date, Accrual Rate or Accrual Bucket.
6		Click Save.

Creating a State Holiday

RULE MAINTENANCE > HOLIDAYS

Step #	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Holidays	Click on the ADD tab.
4		Click on the calendar and select the date from the Calendar Window or manually enter date
5		Description: Enter the name of the holiday.
6		Veteran Rule. This field default to NO. Qualifying holidays must be set to YES to enforce Veteran's rules. If an employee works on one of the qualifying holidays and is a veteran or former reservist,

		and their holiday waiver is NO, they will earn holiday time for the hours worked, up to one day.
7		Former Reservist Rule. This field default to NO. Qualifying holidays must be set to YES to enforce Veteran's rules. If an employee works on one of the qualifying holidays and is a veteran or former reservist, and their holiday waiver is NO, they will earn holiday time for the hours worked, up to one day.
8		If desired, enter the following data in the Set Template Section: Floater, Expiration Date, Accrual Rate and Accrual Bucket. After these values are entered, Select Fill all and the values will be filled for all NUs
9		For Each applicable Negotiating Unit make the appropriate changes to: Floater status, Expiration Date, Accrual Rate or Accrual Bucket.
10		Click ADD.

Note: State Holidays will need to be added to LATS each year when the list of Holidays for the next year is issued by the NYS Department of Civil Service.

Changing a State Holiday

This procedure allows you only to change the floater status and description of the selected holiday. To change the date of a holiday, you must first delete the old holiday and create a new one with the desired date.

RULE MAINTENANCE > HOLIDAYS

Step #	**Active Window**	**Action**
1	Home Page	

2	Rule Maintenance	
3	Holidays	Locate the holiday you want to change.
		Former Reservist Rule: This field defaults to NO. Qualifying holidays must be set to YES to enforce Former Reservist rules.
4		If you want to set all the Negotiating Unit to have all the same settings you can click on the **set template section** to complete by completing the following fields: Negotiating Unit (applies template to all Negotiating Units), Floater (will check the Floater check box for all Negotiating Units to identify the holiday as a Floating holiday, Expiration Date, Accrual Rate (1.0 or 1.50) and the Accrual Bucket (Floater, Holiday and Vacation)
5		Make the appropriate changes to the holiday.
6		Click SAVE.

Deleting a State Holiday

To delete a holiday:

RULE MAINTENANCE > HOLIDAYS

Step #	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Holidays	Locate the holiday you want to delete.
4		Click on the date for that holiday.
5		Click DELETE.

Note: LATS will not allow you to delete any holiday that has been used by an employee. The message "There is/are misc. leave charge(s) made against this holiday so it cannot be deleted" will be displayed at the top of the screen above the list of holidays.

Changing a Holiday's Floater Designation

To change the floater designation of a holiday:

RULE MAINTENANCE > HOLIDAYS

Step #	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Holidays	Locate the holiday you want to change.
4		Click on the date for that holiday.
5		If the holiday is to be a floating holiday, modify the appropriate flags.
6		Click SAVE.

Note: If a holiday is designated as a Floating holiday the Floater check box must be checked, an Expiration Date should be entered AND the Accrual Bucket should be set to Floater.

Personal Leave Accrual Rules

Accrual rules must exist for all time and attendance eligible employees. If your agency has Employees that work part time and in various Negotiating Units, there must be accrual rules set for each percentage and NU.

Viewing the Personal Leave Accrual Rules

RULE MAINTENANCE > PERSONAL LV ACCRUALS

Step #	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Personal L Accruals	Agency: Select the appropriate agency if applicable or leave the agency drop down set to All if there is no agency assigned to this specific rule.
4		Select the appropriate Negotiating Unit from the dropdown or leave it at the ALL default.
5		Click on the rule you wish to view.

Note: LATS defaults to a list of "All" for Agency and Negotiating Unit. You may limit your search to a specific Agency and/or Negotiating Unit by clicking on the drop-down list and choosing the specific Agency and/or Negotiating Unit (this will return results for the selected Agency and/or Negotiating Unit only).

Creating a Personal Leave Accrual Rule

Step #	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Personal L Accruals	Click on the ADD tab.
4		Select the Negotiating Unit.
5		Hrs. Per day: choose 7, 7.5 or 8.
6		Enter the Percent Working. *(Matches up to the Employee percent on the employee profile)*
7		Accrual Effective Date: LATS defaults to 1/1/1900.
8		Accrue Per Period: LATS will add this amount to each biweekly timesheet (if employee qualifies for earned accruals). Enter 0 if employee does not accrue biweekly.
9		Max Accrual: Limits the number of hours an employee may accrue under this category. Example: You may limit a 7.50 hour employee to 37.50 hours annually.
10		Annual Adjustment: This amount will be added to the employee's timesheet on which the personal leave date falls.
11		Starting Years of Service: Sets the number of years an employee must complete to qualify for accruals earned under this rule. If the employee is eligible to earn

		Personal Leave immediately, enter 0 in this field.
12		Ending Years of Service: Sets the number of years that an employee would become ineligible to earn these accruals. Enter 99 if eligibility does not end.
13		Select the Agency or set the dropdown to All.
14		Click ADD.

Note: If a Personal Leave rule does not have an agency assigned to it, the rule is available to all agencies.

Changing a Personal Leave Accrual Rule

RULE MAINTENANCE > PERSONAL LV ACCRUALS

Step #	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Personal Leave Accruals	Locate the Personal Leave Accruals rule you want to modify.
4		Click on Select for that rule. Make the desired changes.
5		Click SAVE.

Deleting a Personal Leave Accrual Rule

RULE MAINTENANCE > PERSONAL LV ACCRUALS

Step#	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Personal Leave Accruals	Locate the Personal Leave Accruals rule you want to modify.
4		Click on Select for that rule.
5		Click Delete and then confirm the delete.

Sick Leave Accrual Rules

RULE MAINTENANCE > SICK LV ACCRUALS

Viewing the Sick Leave Accrual Rules

Step#	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Sick Leave Accruals	Leave the filter on ALL or select the appropriate Agency from the dropdown.
4		Leave the filter on ALL or select the appropriate Negotiating Unit from the dropdown.
5		Click on the row with the appropriate Hours Per Day and % Working.

Note: LATS defaults to a list of "All" for Agency and Negotiating Unit. You may limit your search to a specific Agency and/or Negotiating Unit by clicking on the drop-down list and choosing the specific Agency and/or Negotiating Unit (this will return results for the selected Agency and/or Negotiating Unit only).

Creating a Sick Leave Accrual Rule

RULE MAINTENANCE > SICK LV ACCRUALS

Step#	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Sick Leave Rules	Click on the ADD tab.
4		Negotiating Unit: Limits this rule to employees that fall in this Negotiating Unit.
5		Hours per day: Limits this rule to employees whose normal schedule matches the number of hours chosen: Example: If 8 is chosen from drop-down list, this rule will only be applied to employees set to 8 Hours per Day on Employee Edit or Accruals screens.
6		Percent Working: Limits this rule to employees whose

		profile matches this percentage.
7		Accrual Effective Date: LATS defaults to 1/1/1900.
8		HOP: LATS defaults to blank in this field. No longer valid in LATS.
9		Accrue Per Period: LATS will add this amount to each biweekly timesheet (if employee qualifies for earned accruals). Enter 0 if employee does not accrue biweekly.
10		Max Accrual: Limits the number of hours an employee may accrue under this category. Example: You may limit a 7.50 hour employee to 1500 hours. Biweekly timesheet accruals will be limited to that maximum amount.
11		Annual Adjustment: This amount will be added to the employee's timesheet on which the annual leave date falls. If there will be no annual adjustment enter a zero in this field.
12		IPP: LATS defaults to blank. Click to place a check in this field if the employee's Negotiating Unit participates in IPP.
13		Starting Years of Service: Sets the number of years an employee must complete to qualify for accruals earned under this rule. Enter 0 for all other Negotiating Units.
14		Ending Years of Service: Sets the number of years that an employee would become ineligible to earn these accruals. Enter 99 if eligibility does not end.
15		Annual Adj. Date Month, Day. The month and day that

		the annual adjustment will occur on each year.
16		Sick Monthly Adj. Amount. The amount that will be added each month. Enter a zero if this does not apply.
17		Monthly Adj. Day. Pick a day of the month that the adjustment will occur even if the adjustment amount is zero.
18		Agency: Select the appropriate agency if applicable or leave the agency drop down set to All if there is no agency assigned to this specific rule.
19		Click Save.

Changing a Sick Leave Accrual Rule

RULE MAINTENANCE > SICK LV ACCRUALS

Step#	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Sick Leave Rules	Leave the filter on ALL or select the appropriate Agency from the dropdown.
4		Leave the filter on ALL or select the appropriate Negotiating Unit from the dropdown.
5		Click on the row with the appropriate Hours Per Day and % Working.
6		Make the appropriate modifications.
7		Click Save.

Deleting a Sick Leave Accrual Rule

RULE MAINTENANCE > SICK LV ACCRUALS

Step#	Active Window	Action
1	Home Page	
2	Rule Maintenance	

3	Sick Leave Accruals	Filter by Agency and/or Negotiating Unit via the dropdown and locate the appropriate row/rule.
4		Click Select for the appropriate rule.
5		Click the Delete button.
6		Confirm the delete by clicking Ok.

Caution: You may end up with a missing rule that will prevent timesheets from processing.

Vacation Leave Accrual Rules

Viewing the Vacation Leave Accrual Rules

RULE MAINTENANCE > VACATION LV ACCRUALS

Step#	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Vacation L Accruals	Filter on appropriate Agency and/or Negotiating Unit
4		Click Select for the appropriate rule. This will open the rule maintenance screen so you can view the entire rule.

Note: LATS defaults to a list of "All" for Agency and Negotiating Unit. You may limit your search to a specific Agency and/or Negotiating Unit by clicking on the drop-down list and choosing the specific Agency and/or Negotiating Unit (this will return results for the selected Agency and/or Negotiating Unit only).

Creating a Vacation Leave Accrual Rule

RULE MAINTENANCE > VACATION LV ACCRUALS

Step #	Active Window	Action
5	Home Page	
6	Rule Maintenance	
7	Vacation L Accruals	**Click on the ADD tab.**
8		Define the new accrual rule:

9		Negotiating Unit: Limits this rule to employees that fall in this Negotiating Unit.
10		Hours per day: Limits this rule to employees whose normal schedule matches the number of hours chosen: Example: If 8 is chosen from drop-down list, this rule will only be applied to employees set to 8 Hours per Day on Employee Edit or Accruals screens.
11		Percent Working: Limits this rule to employees whose profile matches this percentage.
12		Years of Service: Enter the number of years an employee must complete to be eligible to earn accruals based on this rule. Example: A CSEA-3 employee who has completed 1 year will earn 8 hours on the annual bonus adjustment. A rule must exist for each Negotiating Unit, for each Percentage amount and for each year completed.
13		Accrual Effective Date: LATS defaults to 1/1/1901.
14		Accrue Per Period: LATS will add this amount to each biweekly timesheet (if employee qualifies for earned accruals). Enter 0 if employee does not accrue biweekly.
15		Max Accrual: Limits the number of hours an employee may accrue under this category.

		Example: You may limit an 8 hour employee to 320 hours maximum. LATS will deduct any hours that exceed that amount on the Use Over Max by date unless employee is set to Allow Excess Vacation Balance-Y.
16		Annual Bonus Time: This amount will be added to an employee's timesheet on which the vacation leave date falls.
17		Use Over Max By: Select the month and date that employees annual leave accruals must not exceed the Max Accrual amount.
18		Fiscal Adjust Period: Select the timesheet period that annual adjustment should occur (if not on employee's anniversary date).
19		Fiscal Adjust Time: Enter the adjustment amount employee should earn on Fiscal Adjust Period.
20		Starting Years of Service: Sets the number of years an employee must complete to qualify for accruals earned under this rule. If employee is eligible to earn Vacation accruals immediately, enter 0 in this field. LATS will accrue vacation leave but not display accruals or allow employee to charge unless Eligible to Use Vacation is set to Y.
21		Ending Years of Service: Sets the number of years that an employee would become ineligible to earn these

		accruals. Enter 99 if eligibility does not end
22		Accrue Method: Determines frequency of accruals.
23		Accrue month: month accruals are credited.
24		Accrue Date: day of the month accruals are credited.
25		Accrue Amount: Amount of additional annual accrual.
26		Agency: Select the appropriate agency if applicable or leave the agency drop down set to All if there is no agency assigned to this specific rule.
27		Click Add

Changing a Vacation Leave Accrual Rule

RULE MAINTENANCE > VACATION LV ACCRUALS

Step #	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Vacation Leave Accruals	Locate the Vacation Leave Accruals rule you want to modify.
4		Click Select for that rule.
5		Make the desired changes.
6		Click SAVE.

Deleting a Vacation Leave Accrual Rule

RULE MAINTENANCE > VACATION LV ACCRUALS

Step#	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Vacation Leave Accruals	Locate the Vacation Leave Accrual rule you want to delete.

4		Click Select for that rule.
5		Click DELETE. The message "Are you sure you want to delete this vacation leave rule?" will display.
6		Click OK.
7		Caution: You may end up with a missing rule that will prevent timesheets from processing.

VRWS Accruals

Although many of the VRWS Accrual Rules are included when you start on LATS, it may be necessary to add a rule based on your agency's requirements.

Note: Unless the specific rule is included in or has been added to VRWS Accrual Rules, an employee's timesheets will not accrue VRWS credits.

Note: VRWS accrual rules require a Delta Percent. The Delta Percent is the difference between 100% and the VRWS percentage the employee is working.

Example

Employee elects to work an 80% VRWS schedule. The Delta Percent is 20.

Viewing the VRWS Accrual Rules

RULE MAINTENANCE > VRWS ACCRUALS

Step#	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	VRWS Accruals	Select the appropriate Negotiating Unit from the drop down.

Adding a new VRWS Accrual Rule

RULE MAINTENANCE > VRWS ACCRUALS

Step#	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	VRWS Accruals	Click on the ADD tab. For each new accrual rule you want to define:

4		Negotiating Unit: Limits this rule to employees that fall in this Negotiating Unit.
5		Hours Per Day: Limits this rule to employees whose normal schedule matches the number of hours chosen.
6		Percent Delta: The Delta Percent is the difference between 100% and the VRWS percentage the employee is working.
7		Accrue Per Period: Enter the number of hours the employee should accrue per pay period.
8		Click ADD.

Changing a VRWS Accrual Rule

RULE MAINTENANCE > VRWS ACCRUALS

Step#	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	VRWS Accruals	Locate the appropriate VRWS rule by narrowing the selection by selecting a specific Negotiating Unit in the Negotiating Unit dropdown.
4		Click on the Neg Unit row that contains the appropriate Delta Percentage and Hours Per Day.
5		Make the appropriate change to the page.
6		Click Save.

Deleting a VRWS Accrual Rule

RULE MAINTENANCE > VRWS ACCRUALS

Step#	Active Window	Action
1	Home Page	
2	Rule Maintenance	

3	VRWS Accruals	Locate the appropriate VRWS rule by narrowing the selection by selecting a specific Negotiating Unit in the Negotiating Unit dropdown.
4		Click Select for that rule.
5		Click DELETE. The warning "Are you sure you want to delete this VRWS Accrual Rule?" will display.
6		Click Ok.

Caution: *You may end up with a missing rule that will prevent timesheets from processing.*

Pass days

The Pass day function is used to define rules for employees who receive time for working on a Pass day. The employee will not be paid for time worked on a Pass day. Eligibility is based on your organization's policy.

Note: If your organization does not earn Pass days, you may skip this section.

Reviewing Pass day Types

RULE MAINTENANCE > PASSDAY TYPES

Step#	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Pass day Types	LATS defaults to "All" Pass day Types.
4		Click on Pass day Type Name under the Description column to view the rules for established Pass day Types.
5		Click CANCEL.

Creating a Pass day Type

RULE MAINTENANCE > PASSDAY TYPES

Step#	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Pass day Types	LATS defaults to "All" Pass day Types.
4		Click ADD Tab
5		Pass day Type: Assign a one-letter designation.
6		Description: Title of employees who will earn this Pass day type.
7		Usage in Days: Number of days employee will have to use earned accruals before LATS deletes the accruals.
8		Min. Hrs. Worked: Number of hours employee must work on Pass day to earn accruals. Must be entered in quarter-hours.

9		Amt. Earned in Hours: The number of hours the employee will earn if the employee works the Minimum required.
10		Click ADD.

Changing Pass day Types

RULE MAINTENANCE > PASSDAY TYPES

Step#	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Pass day Types	LATS defaults to "All" Pass day Types.
4		Click on Pass day Type Name under the Description column to edit rules for an established Pass day Type.
5		Modifications may be made to all fields, including Minimum number of hours required to earn Pass day, Number of hours earned, etc.
6		Click SAVE.

Seasonal Hours Overview

The seasonal hour's functionality was developed to support a business requirement where employees are granted a certain amount of time each day as paid time since they work an abbreviated schedule during the summer months. Automatically adding this specified time on to each day will ensure that they meet the required hours per day as long as they work the scheduled reduced hours on a daily basis. Employees are credited with the number of hours based on items configured by the LATS Administrator. The logic built into this functionality should allow many combinations to exist concurrently.

Configuration Steps for Seasonal Hours

Below outlines the steps required to setup and configure seasonal hours. The details follow.

1. Create a new 'No Charge' leave category
2. Assign a leave code to the category – which will be the leave code added to the user's timesheet.
3. Set up the season hour's rules, which are date effective.
4. Assign the seasonal hour rule to the individual employee, all in the negotiating unit or to specific rotations.

The seasonal hours are added to a user's timesheet for all scheduled days of the pay period – when the user's timesheet for that pay period is first created (typically after the first punch is received).

The following are exceptions that must be handled by the Time and Attendance personnel – for users who have no access to a timesheet. These exceptions can be handled thru the Punch Detail page or directly on the timesheet.

- Employee leaves early. T/A will need to remove the .50 hours credited for seasonal hours, and charge the appropriate leave category.
- Employee takes the day off. T/A will need to remove the .50 hours credited for seasonal hours and charge the appropriate leave category.
- Employee works a full 8 hours or more. T/A will need to remove the .50 hours credited for seasonal hours.
- Holidays. T/A will need to remove the .50 hours credited for seasonal hours. This exception will be handled in a future modification.

Seasonal Hours Detailed Steps

- Create a new charge code under the No Charge category. To do this you would need to go to the Code Maintenance – Categories and search for No Charge and then click on the No Charge row to open the Edit window.
- Once you are in the edit window you can click on the Add Code button to add a new Charge Code.
- Complete the new code window that is attached to the No Charge category.
- Next you can create the rule for the Seasonal Hours under the Rules Maintenance menu option.
- Select the Seasonal Hours sub menu option and complete the fields that identify how many hours and for what duration the time should be added for the employees.

- After the rule is created you can manage the Seasonal Hours under the Admin Menu by selecting the Manage Seasonal Hours sub menu. You can manage these by employee or Negotiating Unit.
- You can also add the summer hours rule to existing rotations and propagate these changes to existing employee rotations. To do this you would need to go into the Scheduling menu option and then click on the Rotation tab.

If you wish to attach a Seasonal Rule to an existing Rotation instead of creating a new rotation just for seasonal hours you can do so by clicking on the desired rotation and this will open the edit window.

- Select the appropriate Seasonal Hours rule from the dropdown menu option and then select Yes in the Propagate Changes dropdown box. *(We have identified which changes in this screen will propagate to existing rotations for you.)*
- If you go into an employee's record and click on the Rotation tab you should now see the appropriate seasonal hours in the Seasonal Hours dropdown tab.

View Seasonal Hours rules

RULE MAINTENANCE > Seasonal Hours

Step#	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Seasonal Hours	Will display all existing Seasonal hours Rules
4		Click on the row for the desired seasonal rule
5		Seasonal Rule will be displayed
6		Click Cancel

Creating Seasonal Hours rules

RULE MAINTENANCE > Seasonal Hours

Step#	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Seasonal Hours	Will display all existing Seasonal hours Rules
4		Click ADD Tab
5		Description: Enter Description of the Seasonal Rule
6		Add Daily Hours: Enter the number of daily hours
7		Leave Code: Select Leave Code to use
8		Start Date: Enter date to start seasonal rule
9		End Date: Enter date to end seasonal rule
10		Click Save

Change Seasonal Hours rules

RULE MAINTENANCE > Seasonal Hours

Step#	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Seasonal Hours	Will display all existing Seasonal hours Rules
4		Click on the row for the desired seasonal rule

5		Seasonal Rule will be displayed
6		Modify data as necessary
7		Click Save

Delete Seasonal Hours rules

RULE MAINTENANCE > Seasonal Hours

Step#	Active Window	Action
1	Home Page	
2	Rule Maintenance	
3	Seasonal Hours	Will display all existing Seasonal hours Rules
4		Click on the row for the desired seasonal rule
5		Seasonal Rule will be displayed
6		Click Delete
7		Confirm Delete by selecting OK

Academic Year

Academic Year: This menu item is used to set up the calendar year for the teacher population and to manage their floating holiday and personal leave credits.

Step#	Active Window	Action
	Home Page	
	Rule Maintenance	
	Academic Year	Click the Add tab
		Select the Agency from the dropdown list or select –ALL—if this academic calendar will apply to any agency.
		Select the Start Date Month and Day.
		Select the End Date Month and Day.
		Enter the number of Floating holidays per year that teachers should accrue.
		Enter the number of Personal Leave Days per year that teachers should accrue.

		Enter the Floating Days Expiration Date Month/Day.
		Enter the Personal Leave Days Expiration Date Month/Day
		Click Add

Chapter 4: Time Distribution System

Topics Discussed In This Chapter:

- TDS Categories and Tasks
- Maintaining TDS
- TDS Category Association
- TDS Percent Distribution

TDS Categories and Tasks

If your organization requires all or some of its employees to distribute time to tasks, you will need to create the TDS categories and their associated tasks. If your organization requires none of its employees to do so, you may skip this chapter.

What you will need to create TDS categories and tasks:

- A list of all TDS categories.
- For each TDS category, a list of all currently active tasks to which employees can distribute time. If the task has a beginning and end date associated with it, you will need to know those dates.

To create TDS Categories and tasks:
For each TDS category, you will need to create the category within LATS. To do this, see "Creating a TDS Category".

For each task within the category you have created, you will need to create an entry for the task. To do this, see "Creating a TDS Task".

Maintaining TDS

TDS Categories

Four types of categories are available in LATS. You may not see all four, however. Display of Custom and Imported categories is limited to those agencies which have purchased advanced functionality.

The four types of categories are as follows:

Global

Select GLOBAL if you want to include a common set of tasks for all regular categories. Global categories allow you to define tasks once that may be used in many different categories. Global categories will not display in an employee's drop-down category list; but choosing any category from the list will display global tasks that are set to the employee's organizational structure or that are not limited to a specific organizational area. These tasks will also be displayed if your agency is using either Custom or Imported categories.

Regular

Select REGULAR when defining categories and tasks that will use the standard TDS entry pages. Regular categories can be set to a specific organizational structure or agency-wide. Regular categories will be displayed in the dropdown list on an employee's TDS page. Tasks associated to a Regular category can only be used by that category.

Custom

This choice will be displayed only if your agency is using a TDS custom page version 2. Custom categories will be displayed on the custom TDS page.

Imported

This choice will be displayed only if your agency is importing TDS information from a source, as opposed to direct entry. These categories will be displayed on the TDS custom page version 1.

Creating a TDS Category

TDS MAINTENANCE > TDS CATEGORIES

Step#	Active Window	Action
1	Home Page	
2	TDS Maintenance	
3	TDS Categories	Click on the ADD tab.
4		Category: A short name, or code, for the category; a 20-character maximum.
5		Category Type: From the drop-down list, choose the type of category.
6		Description: A concise but clear description of the intended use of the new category; 150-character maximum.
7		Narrative: The description of the category which will display when a user clicks Narrative; 255-character maximum.
8		Active: Check the box to indicate the category will immediately become active. If a category is not active, LATS will not display it; therefore, employees will be unable to select it.

9		Non-Productive: Check the box if the category will not be directly work-related/billable; for example, training.
10		Agency: Select the agency with which this category is associated.
11		Division: If you want the category to be available only to employees in a particular division, select the division from the drop-down list.
12		Bureau: If you want the category to be available only to employees in a particular bureau within the selected division, select the bureau from the drop-down list.
13		Click SAVE.

Reassigning TDS Categories

TDS MAINTENANCE > TDS CATEGORIES

Occasionally, the hierarchy of organization-to-category relationship changes. To accommodate this, you may move categories from one organization to another.

Step#	Active Window	Action
1	Home Page	
2	TDS Maintenance	
3	TDS Categories	TDS Category: Locate the category you want to reassign.
4		Click on the Short Name for that category.
5		Indicate the new level of your agency for which the category will be available by making choices from the Division and Bureau drop-down list.
6		Click SAVE.

Deleting TDS Categories

TDS MAINTENANCE > TDS CATEGORIES

Step#	Active Window	Action
1	Home Page	

2	TDS Maintenance	
3	TDS Categories	Locate the category you want to delete.
4		Click on the Short Name for that category.
5		Click DELETE. The message "Are you sure you want to delete this Category?" will be displayed.
6		Click OK to confirm.

Note: If a category has been created in error, you can delete that category only when no tasks have been assigned to it. If a category has already been used, you will be unable to delete it. You may choose to remove the check on the Active setting to prevent employees from selecting it.

TDS Tasks

Creating a TDS Task

TDS MAINTENANCE > TDS TASKS

Step#	Active Window	Action
1	Home Page	
2	TDS Maintenance	
3	TDS Tasks	Click the ADD tab.
4		Category: Select the appropriate Category from the drop down that the Task will be associated with.
5		Task Code: System Defined *(configurable setting)*
7		Description: A concise but clear description of the intended use of the task; 75-character maximum.
8		Activation Date: The first date on which time can be distributed to the new task.
9		Inactivation Date: The last date on which time can be distributed to the new task.
10		Narrative: The text which the system will display to a user who clicks on Narrative; 255-character maximum.

11		Comments: Additional Information about the new task, if necessary.
		Direct/Indirect: Options are Not Specified, Direct, Indirect. These flags are used to identify Tasks for TDS reporting/billing. There is no functionality associated with this dropdown. This field is for reporting purposes only.
		Sub Task Required: Options are Not Required or Required. If the sub task is required, LATS will flag an error on the TDS page alerting the employee that they must select a sub task for the entry to be saved.
12		Click SAVE.

Note: It is important to remember that all tasks must be associated with a category. If the new task will be associated with a category that does not yet exist, see "Creating a TDS Category".

Note: Employees will not be able to select or use a task which falls outside of the Active dates as designated above.

Reassigning TDS Tasks

TDS MAINTENANCE > TDS TASKS

Occasionally, the hierarchy of category-to-task relationships changes. To accommodate this, you may move tasks from one category to another.

To reassign tasks:

Step#	Active Window	Action
1	Home Page	
2	TDS Maintenance	
3	TDS Categories	Locate the category currently associated with the task you want to reassign
4		Click TASKS for that category.
5	TDS Tasks	Locate the task you want to reassign. /Click the Task Code for that task.
6		Select the new category from the drop-down list.

7		Click SAVE.

Changing the Date Range for a Task

TDS MAINTENANCE > TDS TASKS

Occasionally, it is necessary to alter the Activation Date, the Inactivation Date, or both, for a particular task. To do this:

Step#	Active Window	Action
1	Home Page	
2	TDS Maintenance	
3	TDS Categories	Locate the category associated with the task that you want to modify the date range for.
4		Click on the Tasks for that category.
5	TDS Tasks	Locate the task you want to reassign.
6		Click the Task Code for that task.
7		Modify the Activation and/or Inactivation dates.
8		Click Save.

Deleting TDS Tasks

TDS MAINTENANCE > TDS TASKS

If a task is created erroneously, you can remove the task from the LATS database.

Note: The LATS system will not allow you to delete tasks to which users have assigned time. If you find that time has been assigned to a task you want to delete, you will need to make the task inactive to make it unavailable for further use. *See "Changing the Date Range for a Task".*

To remove a task from the LATS database:

Step#	Active Window	Action
1	Home Page	
2	TDS Maintenance	
3	TDS Tasks	Locate the task you want to delete.
4		Click the Task Code for that task.
5		Click DELETE.

6		Click Ok to confirm deletion of task.

Viewing the Change History for a Task

TDS MAINTENANCE > TDS TASKS

Over the life span of a task, changes to its definition may occur. To view a history of these changes:

Step#	Active Window	Action
1	Home Page	
2	TDS Maintenance	
3	TDS Tasks	Locate the task you want to examine.
4		Click the HISTORY button for that task.
5		Click the Close "X" in the upper right hand corner of the History page.

TDS Sub Tasks

Sub Tasks are assigned at the TDS Category level and not specifically attached to a specific task.

To view and modify sub tasks attached to a specific category

Step#	Active Window	Action
1	Home Page	
2	TDS Maintenance	
3	TDS Subtasks	Select the appropriate Subtask name or TDS category from the drop down list and click Search.
4		This will return all subtasks related to that category.
5		Click on the Subtask Code, LATS will display the Modify Tab for selected subtask
6		Make Changes as necessary
7		Select SAVE

Creating a new sub task

Step#	Active Window	Action
1	Home Page	
2	TDS Maintenance	
3	TDS Subtasks	Click the ADD tab.

4		Enter the Sub Task Code
5		Enter the description
6		Select the appropriate category from the dropdown list.
7		Select the appropriate Agency.
8		Select the appropriate Division if applicable.
9		Check the Active box if the Sub Task is active.
10		Enter a narrative about the sub task if desired.
		Sub Task Type: Options are Not Specified, Federal and Non-Federal. There is no functionality assigned to the options in this dropdown. This field is for reporting purposely.
11		Click Save.

Deleting a sub task

Step#	**Active Window**	**Action**
1	Home Page	
2	TDS Maintenance	
3	TDS Subtasks	Select the sub task you wish to delete from the Sub task drop down.
4		Click on the Sub task code.
5		Click Delete.

****Sub Tasks that have been used cannot be deleted. If a Sub Task has been used the end user may make it Inactive by un-checking the Active box. This will not allow the Sub Task to be utilized any longer.*

Custom TDS

Customers have the option of utilizing a Custom TDS page for recording TDS information if the standard TDS model does not meet their requirements. Currently there are four Custom TDS pages available in LATS.

Custom Page Version 1 allows the end user to search by Project Number and Project Title.
Custom Page Version 2 allows the end user to search by Exam Number or Comp. Name.
Custom Page Version 3 allows the end user to search by Category, Task and Cost Center.
Custom Page With Section allows the end user to narrow TDS options by Agency, Division, Bureau, Section, Function Group (Category) and Function Code (Task).

Note: If there is no custom page assigned to an agency (this is normal) the employees will have the standard TDS page for TDS entries.

Creating a new Custom TDS Task

Step#	Active Window	Action
1	Home Page	
2	TDS Maintenance	
3	Custom TDS Access	Click on the ADD tab.
4		Page Version: select the appropriate custom page
5		Agency: select the appropriate agency.
6		Division: select the appropriate Division if applicable or leave blank if applicable to all Divisions in the Agency.
7		Bureau: if an Agency and Division are selected the end user may select the appropriate Bureau.

Deleting a Custom TDS Task

Step#	Active Window	Action
1	Home Page	
2	TDS Maintenance	
3	Custom TDS Access	Click on the Search tab.
4		Click on the Organization link for the Custom TDS Page you want to delete.
5		Click Delete.
6		Click Ok to confirm delete.

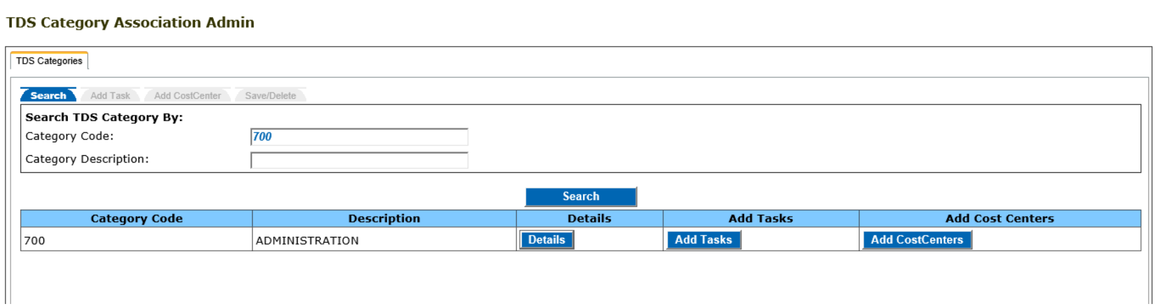
TDS Category Association

The TDS Category Association module allows a project code (category) to be associated with more than one cost center, and an activity code (task) can be associated to multiple projects. LATS utilizes a Custom TDS page to manage the TDS Category, TDS Task, Cost Center and percent.

When a task or cost center is added (associated) to a category, there are additional attributes. It can be identified as being valid for the TDS Percent distribution (which is TDS that is set up for specific item numbers or employees and prefills their timesheet. It can also be identified as being valid for TDS – meaning the combination can be added to the TDS page by an employee, in addition to their default TDS.

Viewing/Editing an Existing Record

Step#	Active Window	Action
	TDS Maintenance	
1	TDS Category Association	Enter Category Code or Description.
2		Click the Search button.
3		LATS will return data rows that meet the search/partial search criteria.
4		Click the Detail link to manage the Task and Cost Center Data.
5		Make the appropriate edits for the Tasks or Cost Center and click Save.



TDS Task(s) for Category : 700 - ADMINISTRATION

Select	Task Code	Task Description	Valid Percent	Valid TDS
☐	000	UNASSIGNED	☐	☑
☐	100	ADMINISTRATION	☑	☑
☐	130	PERSONEL ADMINIS	☑	☑
☐	140	MANAGEMNT SUPPRT	☑	☑
☐	150	AUTO DATA PROCES	☑	☑
☐	160	REPORT & ANALYS	☑	☑
☐	180	SERVICES	☑	☑
☐	193	OSHA	☑	☑
☐	198	PROMOT INDSTHARM	☑	☑
☐	561	LMI	☑	☑
☐	700	PROGRAM ADMINISTRATI	☑	☑

Cost Center(s) for Category : 700 - ADMINISTRATION

Select	Cost Center	Variable	Budget Year	Valid Percent	Valid TDS
☐	0200101		0	☑	☑
☐	0200201		0	☑	☑
☐	0300101		0	☑	☑
☐	0301001		0	☑	☑
☐	0400101		0	☑	☑
☐	0401001		0	☑	☑
☐	0500101		0	☑	☑
☐	0600101		0	☑	☑
☐	0600201		0	☑	☑
☐	0600301		0	☑	☑
☐	0600401		0	☑	☑

TDS Percent Distribution

The TDS Percent Distribution page is used in conjunction with the TDS Category Association.

Hourly employee percentage distribution is not tied to an item number, but directly to the employee. The Category, Task, Cost Center and Regular Hours Percent and OT Hours Percent.

The TDS Percent Distribution page allows a search by employee or by item number.

Search By: ○ By Item ◉ By Person

Employee

[ ] **Search**

Note: Distribution data for annual employees (pay basis AN) is associated to an item number only, not directly to the employee.

When searching by Agency code and Item number, after retrieving a valid record, the name of the employee currently appointed to the item is displayed on the page. If multiple employees are tied to the same item number LATS will display a Multiple Incumbents page to select the correct employee.

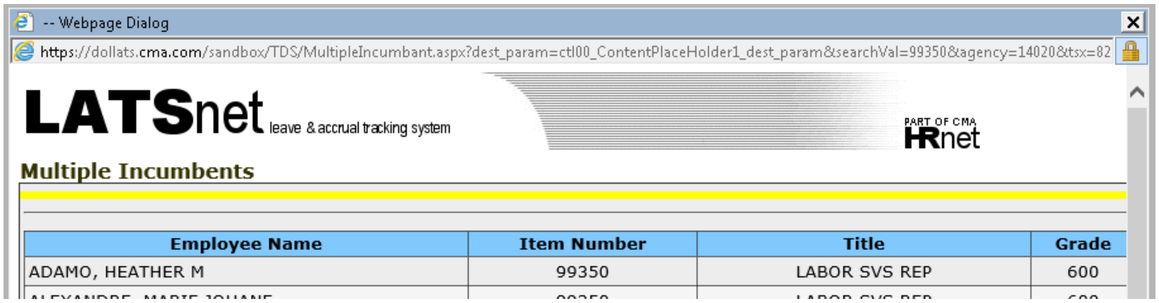
TDS Details for Employee: ANCHIN, STEPHEN H **Title:** LABOR SVS REP **Grade:** 600 **Item No:** 99350

Delete	Category	Task	Cost Center	Regular Hours %	OT Hours %
☐					
☐					
☐					
☐					

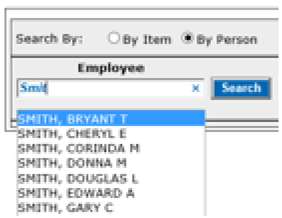
Regular Total	OT Total
100.00	100.00

Save Distributions

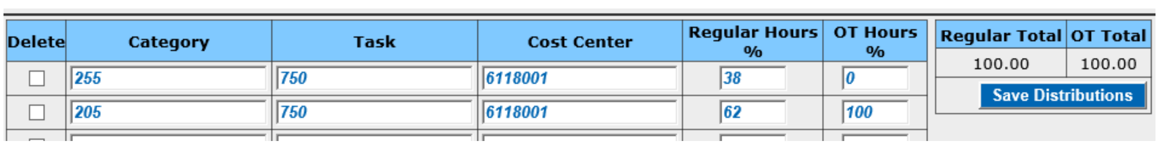
Example of the Multiple Incumbents page is below:



Search by name – after entering 3 characters a selection list will be built containing matches (searches both first and last name)



Once an employee, or item number is selected, the admin can modify the Percent Distribution page. The data that is configured on the Percent Distribution page will prefill the employees TDS tab based on hours entered on the face of the timesheet.

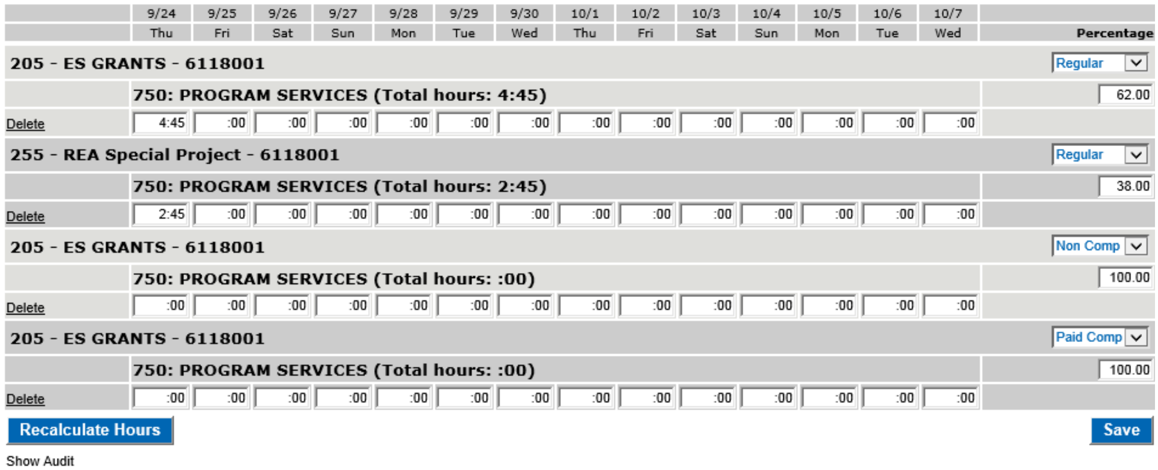


If the employee enters hours on the face of the timesheet, LATS will automatically apply the percent distribution to those hours and the employee does not need to enter them on the TDS tab. The employee can update the TDS tab is necessary but this is usually an exception based on feedback from the agency.

Screen shot of the daily time entry:

Extras	9/24 Thu	9/25 Fri	9/26 Sat	9/27 Sun
Schedule	7:30	7:30	:00	:0
Day In	7:00 AM			
Lunch Out	12:00 PM			
Lunch In	12:30 PM			
Day Out	3:00 PM			
Tardy	:00	:00	:00	:0
Earned Non comp	:00	:00	:00	:0
Paid comp (overtime)	:00	:00	:00	:0
OT meal	0	0	0	
Vacation	:00	:00	:00	:0
Sick-regular	:00	:00	:00	:0
Sick-family	:00	:00	:00	:0
Personal	:00	:00	:00	:0
NonComp	:00	:00	:00	:0
Holiday	:00	:00	:00	:0
Floater	:00	:00	:00	:0
VRWS	:00	:00	:00	:0
Misc Leave	:00	:00	:00	:0
Time Worked	7:30	:00	:00	:0
Charges	:00	:00	:00	:0
Total Time	7:30	:00	:00	:0
	9/24 Thu	9/25 Fri	9/26 Sat	9/27 Sun

A screen shot of the associated TDS tab:



	9/24 Thu	9/25 Fri	9/26 Sat	9/27 Sun	9/28 Mon	9/29 Tue	9/30 Wed	10/1 Thu	10/2 Fri	10/3 Sat	10/4 Sun	10/5 Mon	10/6 Tue	10/7 Wed	Percentage
205 - ES GRANTS - 6118001															Regular
	750: PROGRAM SERVICES (Total hours: 4:45)														62.00
Delete	4:45	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	
255 - REA Special Project - 6118001															Regular
	750: PROGRAM SERVICES (Total hours: 2:45)														38.00
Delete	2:45	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	
205 - ES GRANTS - 6118001															Non Comp
	750: PROGRAM SERVICES (Total hours: :00)														100.00
Delete	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	
205 - ES GRANTS - 6118001															Paid Comp
	750: PROGRAM SERVICES (Total hours: :00)														100.00
Delete	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	

Recalculate Hours | Save

Show Audit

Chapter 5: Working with Employees

Topics Discussed In This Chapter:

- Establishing Employee Initial Status
- Entering a New Employee
- Assigning Supervisor
- Working with Alternates

Establishing Employee Initial Status

If your organization can import employee status from HRIS, NYSTEP, HCM or another personnel system, parts of this step will not be necessary.

LATS allows entry and edit of most employee information through the ADMIN > USERS path. As each screen is completed and saved, LATS re-displays tabs for other options, including General Info, Employee, Accruals, Time clock, Supervisor, Delegate, Timekeeper, Rotation, Misc. Leave and Adjustments.

What you will need to establish employee status:

A list of all employees in your agency; or, at the very least, a list of all employees in the unit(s) your agency will begin implementation with.

For each employee on the list, you will need the following information:

- What is the employee's annual leave date? If your Agency can import information from the personnel system this is not necessary.
- What is the employee's personal leave date? If your Agency can import information from the personnel system this is not necessary.
- Does the employee participate in IPP? M/C employees who participate in IPP do not earn sick leave accruals on biweekly timesheets. They earn a lump sum amount semi-annually based on dates entered in IPP Grant Dates. If so, what are the grant dates for sick time? If your Agency can import information from the personnel system, this is not necessary.
- Does the employee record his time on an administrative or institutional pay cycle?

Note: Beginning and end dates on timesheet are determined by this selection.

- Is the employee eligible to earn and use leave (time and attendance eligible)?
- Is the employee eligible to earn and use vacation?
- Is the employee allowed to accrue vacation time above the "normal" limit?
- Is the employee required to use TDS? If so, is the employee required to allocate the time by percentage?
- Does the employee have a holiday waiver?
- Does the employee need to use a time clock to record his ins/outs?
- Is the employee eligible to receive overtime compensation? Is so, has the employee elected to participate in Over40 Non Comp program?
- Does the employee participate in AWS? If so, what are normal Pass days for the employee?

- What method will this employee use to record overtime? Will it be based on entries on the timesheet or will overtime be recorded on the Additional Time tab?
- Does this employee accrue Non Comp overtime?
- Is this employee eligible to earn Pass days?
- For each accrual category, the number of hours the employee has accumulated.

Enter the employee's accrual balances as of the date shown in the Initial Balance Date for each category in which the employee has a balance. These accrual amounts will become the beginning balances on the employee's first timesheet on LATS.

Additional items that can be configured for the employee are:

- T/A Eligible: If the employee is Time and Attendance eligible (will earn accruals) check this box.
- Eligible to use Vacation: If the employee is going to be allowed to use their vacation prior to the waiting period check this box.
- TDS Required: If the employee will be required to record their time worked on specific tasks check this box.
- OT Eligible: If the employee is allowed to earn overtime pay or time check this box.
- Holiday Waiver: If the employee is choosing to earn time instead of pay for holidays worked check this box.
- Former reservist: If the employee is a former reservist and entitled to additional benefits/pay on certain holidays check this box.
- LATS will default to TIMESHEET OT on Method of Recording Overtime (overtime is recorded on the main timesheet page). If employee's overtime will be captured through the Additional Time tab, choose that option from the drop-down list.
- Min. Hrs. Worked to Earn OT and Num of Weeks OT Applies will default to correct settings based on the choice in Method of Recording Overtime.
- LATS will default to N/A on Eligible to Earn Pass days. If employee does earn time when working on a Pass day, choose the correct Pass day policy from the drop-down list.
- Min Hours Worked to earn OT: The number of hours and employee must work before being eligible to earn OT.
- AWS: If the employee will work an alternate work schedule (flex time) check this box.
  If one of the following statements is true:
  The employee participates in AWS, or
  You want the system to check the employee's timesheet only to make sure that weekly or biweekly hourly totals are met, not that each day must have a specific number of hours.
  An employee on AWS may work long and short days or may work a reduced number of days during a pay period, but still work the total expected hours.
  If neither of the statements is true, proceed to the next step.
  AWS: Select YES from the drop-down list.
  Select the appropriate number of hours for each week in a payroll period from the Week 1 Normal Hours and Week 2 Normal Hours fields.
  If you want the system to check the employee's timesheet for the selected number of hours for each week, select NO in Bi-Weekly Total.
- Last Accrual Date: the last date the accrual process ran for this employee.
- Allow Excess Vacation Balance: Check this box if the employee will be allowed to exceed the maximum vacation balance allowed on the accrual rule.

- TDS By Percent: This field is enabled if the TDS Required check box is checked. If the employee is to record TDS by a percentage rather than hours worked check this box.
- Comp Over 40 Eligible: Checking this box will display an additional overtime line (Comp Over40) and will require employee to enter all overtime worked in that line until the maximum is reached.
- Enforce Punch Restriction: If this attribute is checked it enables the function to lock out a clock user from punching at a clock before a certain time. *****This needs to be configured on the clock with the new dotNet release.***
- Veteran Status: If the employee is a veteran and should receive additional benefits for working certain holidays check this box.
- Accrue Non Comp: If the employee is allowed to bank the time worked between their normal hours per week and 40 hours check this box. The most common scenario is for a 7.50 hour per day employee. This type of employee works 37.50 hours per week. Any time worked between 37.50 and 40.00 can be accrued as non-comp time and used at an additional date for paid time off.
- Num of Weeks OT Applies: If the Method of Recording OT is set to Timesheet or Overtime tab the default is 1 week. If the Method of Recording OT is set to Additional Time the values available are 1 week or 4 weeks. (Most clients will use the 1 week value. If you are unsure of which option to select please contact your client support representative)
- Timesheet Validation forces the timesheet to validate against the schedule planner or based on Hours/Days/Pass days. LATS will default to HRS/DAYS and AWS in Timesheet Validation. If your organization requires validation based on the Schedule Planner, choose SCHEDULES from the drop-down list.
- Click to select the appropriate Pass days in the Week 1 Pass days and Week 2 Pass days area. LATS defaults to the number of hours per day and work week entered in the Employee Information window.

Note: Pre-set Pass days may be set for days other and Saturday/Sunday for employees not designated AWS. Edits will prevent setting more than four Pass days for a non-AWS employee. In addition, Pass days can be set from the timesheet profile page. Changes made on the profile will affect that timesheet only.

- Choose the correct Pass days for this employee. Pass days may be changed and saved without setting AWS to YES if the employee is part-time. LATS will not allow more than two Pass days per week for a full-time employee without changing the AWS setting for the employee to YES .

Comments: If necessary, add a concise but clear explanation of why you are setting the employee's initial balance date.

- Click SAVE. LATS will save the information you have entered about the employee and re-display the Accrual Balances window.

Establishing Employee Initial Status

If the Employee:	**Take this action:**	**Otherwise**
Is eligible to use leave	Put a check mark in TA Eligible	Do not check TA Eligible

Checking the box will allow the employee to accrue and charge Personal and Sick Leave.

If the Employee:	**Take this action:**	**Otherwise**
Is eligible to use vacation	Check the Eligible to Use Vacation box	Do not check the Eligible to Use Vacation/Annual Leave box.

Checking the box will allow the employee to accrue and charge to Vacation Leave.

If the Employee:	**Take this action:**	**Otherwise**
Is allowed to accrue vacation time above the Excess Vacation "normal" limit	Check the Allow Excess Vacation box	Do not check the Allow Excess Vacation box

Checking the box will allow the employee to exceed the maximum balance on the "use over Max by" date set in the Vacation leave accrual rules. The employee will not be cut back to the maximum.

If the Employee:	**Take this action:**	**Otherwise**
Is required to use TDS	Check the TDS Required box.	Do not check the TDS Required box

Checking the box will require the employee to complete Time Distribution information on the LATS timesheet. Employee will complete information in hours.

If the Employee:	**Take this action:**	**Otherwise**
If required to use TDS, allowed to allocate time by percentage?	Check the TDS by Percent box	Do not check the TDS by Percent box.

Checking the box will require employees to complete Time Distribution information by percentage.

If the Employee:	**Take this action:**	**Otherwise**
Is eligible for overtime	Check the box for OT Eligible box.	Do not check the OT Eligible

Checking the box will display overtime lines on the timesheet. Not checking the box will remove all overtime lines from the timesheet and will allow the employee to exceed usual hours without accounting for extra hours. The employee will be able to submit the timesheet as completed. *OT Eligible employees will always have a Time In/Time Out timesheet.*

If the Employee:	**Take this action:**	**Otherwise**
Is eligible for overtime and elected to participate in Over 40 non comp	Check the Comp Over40 Eligible box.	Do not check the Comp Over 40 Eligible box.

Checking the box will display an additional overtime line (Comp Over40) and will require employee to enter all overtime worked in that line until the maximum is reached.

If the Employee:	**Take this action:**	**Otherwise**
Has signed a waiver accepting holiday time instead of holiday pay	Check the Holiday Waiver box.	Do not check the Holiday Waiver box.

Checking the box will result in the addition of Holiday accruals to the timesheet for any hours worked on a holiday during the employee's normal work schedule. The employee will not enter or receive payment for time worked on a holiday.

If the Employee:	**Take this action:**	**Otherwise**
Is required to use a time clock to record time in and time out.	Check the Clock User box.	Do not check the Clock User box.

Checking the box in this field will require the employee to enter time by swiping on a time clock or by entry on a "soft clock". The employee will not be able to add, delete, or change time in/time out entries.

If the Employee:	**Take this action:**	**Otherwise**
Will accrue non comp Overtime	Check the Accrue Non Comp box	Do not check the Accrue Non Comp box.

Checking the box allows the employee to earn time for hours worked between 37.50 and 40. Not checking the box prevents the employee from earning non comp overtime for these hours according to organizational policy.

If the Employee:	**Take this action:**	**Otherwise**
Is hourly and will earn accruals based on actual number of hours worked during each timesheet	Select DYNAMIC in Dynamic Employee Percent	Select FIXED in Dynamic Employee Percent (LATS will default to FIXED)

Selecting DYNAMIC in this field allows the employee to earn accruals based on the number of hours actually worked in the pay period. LATS calculates the percentage and grants accruals to the employee based on that percentage.

Entering a New Employee

Most LATS installations receive their information about new employees either from HRIS or NYSTEP or some other agency-specific HR system. However, it is necessary, on occasion, to enter information about a new employee directly into LATS.

To enter a new employee:

LATS ADMIN > Users (General tab)

Step#	Active Window	Action
1	Home Page	
2	Admin> Users	
3	General Tab	Social Security Number: Enter the new employee's unique Social Security number. *Note: If an employee has been established on LATS and the Social Security number was entered incorrectly, you may correct the Social Security number by clicking in the box next to the current Social Security number and entering the correct number.* First Name: Enter the first name as you want it to appear on LATS
4		Mid Initial: Enter a middle initial for the employee, if available. This will be helpful if your organization has more than one employee with the same first and last name.
5		Last Name: Enter the last name as you want it to appear on LATS.
6		Name Suffix: as you want it to appear on LATS.
7		Email Address: This information will be required if your organization is

		sending LATS e-mails to remind employees to submit or approve timesheets.
8		Address 1: as you want it to appear on LATS.
9		Address 2 (if applicable): as you want it to appear on LATS.
10		City: as you want it to appear on LATS.
11		State: as you want it to appear on LATS.
12		Zip Code: as you want it to appear on LATS.
13		Phone Number: as you want it to appear on LATS.
		NYS Employee ID: Enter the NYS Employee ID. Non State customers can use this field to enter a unique employee id number.
14		User Name: the login id the employee will use to utilize LATS.
15		User Roles: Check the boxes for the appropriate user roles for the employee. ALL LATS users must have the User check box checked. **Please see security role access addendum for specific role access and setting any segmentation access.
16		Select the appropriate Agency, Division, Bureau and Section for the employee.
17		Click Save.

Employee Entry (Employee tab)

Step#	Active Window	Action
1	Employee Tab	Employee Priority: LATS defaults to 1. If your organization chooses to use the LATS Payment transfer function, this number must agree with PayServ employee number.

2		Percent: LATS defaults to 100. If employee is working part-time, this amount should be changed to the employee's correct percentage.
3		Salary Grade: Enter correct salary grade for the new employee. LATS requires this information for certain timesheet and accrual rules.
4		Salary: Enter the Per Diem base Salary rate. ***This field is only required if Pay Basis = Per Diem.***
5		Status Flag: LATS defaults to P (permanent). Choose the correct designation for this employee from the dropdown list.
6		Initial State: Date the employee first begins work for your organization.
7		Effective Date: Enter the date this transaction should take effect on LATS.
8		VRWS percent: If the employee participates in VRWS, change this percentage to 100%.
9		Pay Basis: LATS defaults to ANNUAL. Other options in the dropdown are: Hourly, Per Diem and Calendar.
10		Active Status: LATS defaults to ACTIVE. If the employee is hired and put on immediate leave, you may choose LEAVE from the drop-down list or you may choose to set the Initial Balance Date at a later time.
11		Full/Part Time: LATS default to F. Choose the correct designation from the drop-down list if the employee is part-time or is VRWS. This designation must agree with percent and VRWS percent entered previously.

12		Negotiating Unit: Choose the correct negotiating unit for the employee. This information is required for LATS to enforce accruals, payments, etc.
13		Item Number: Enter the correct item number for the employee. This information will be used for such functions as Payment Transfer.
14		Title: Choose the correct title from the drop-down list. If the title does not exist, see "Creating a New Title".
15		Work Location: Choose the employee work location from the dropdown list. If the work location does not exist, see "Creating a new Work Location" *Note: this is not required by default. There is a config setting (AllowChangeWorkLoc) which makes this a required field.*
16		Location: Choose the employee location from the dropdown list. If the location does not exist, see "Creating a new Location"
17		Position Pool ID: Enter information, if required by your organization.
18		Position Number: Enter, if required by your organization.
19		Click Save.

Employee Entry (Accruals Tab)

Step#	Active Window	Action
1	Accruals Tab	Personal Leave Data: Enter the date which LATS will use to calculate Personal Leave accruals for the employee.
2		Vacation Leave Date: Enter the date which LATS will use to calculate Vacation Leave accruals for the employee.

3		IPP Grant Date 1: For MC employees only, enter the date employees will earn their first bucket of IPP sick time.
4		IPP Grant Date 2: For MC employees only, enter a date six months after the IPP Grant Date 1. Sick leave will be granted on these dates.
5		Pay Cycle: Select INSTITUTIONAL or OTHER from the Pay Cycle drop-down list.
6		Initial Balance Date: Select the appropriate Pay Period in which LATS will start looking for timesheets to be submitted. *(Dates are based on Pay Cycle)* Selecting an IB Date will enable the accrual balance fields for data entry if employees are carrying accruals from a prior agency.
7		Enter any beginning accrual balances that the employee may be starting with.
8		TA Eligible: check box if employee will be earning accruals.
9		Eligible to Use vacation: check if employee will be allowed to use vacation time..
10		TDS Required: check if employee is required to record time by task on TDS tab.
11		OT Eligible: check box if employee is allowed to earn overtime time/pay.
12		Holiday Waiver: check if employee has opted to earn time instead of pay on holidays worked.
13		Clock User: Check this box if the employee is a Clock User. *Note: This enables the Soft Clock Types dropdown box.*

14		Former Reservist: check if the employee is a former reservist.
15		Method of Recording OT: Options are Timesheet, Additional Time or Overtime tab. Select the appropriate method for your agency. Most customers will use the Timesheet or Additional Time tab.
16		Min Hours Worked to earn OT: The number of hours and employee must work before being eligible to earn OT. *Note: This field is enabled with the Method of Recording it set to Additional Time.*
17		Eligible to Earn Pass days. If employees earn time when working on a Pass day, choose the correct Pass day policy from the drop-down list. *Note: This is specific for the NYSP at this time.*
18		Hours per day: Choose the correct number of hours per day that the employee will normally work. Hours entered are used as the basis for the accrual rules. If the employee is part-time, LATS will calculate hours based on the percentage of the normal work day.
19		AWS: If the employee will work an alternate work schedule (flex time) check this box.
20		Week 1/Week 2 Normal Hours: This field is not enabled unless the employee is AWS. LATS defaults to 37.50 for 7.50 hours per day employee.
21		Default Present Absent: This will force the employee to use the Present Absent timesheet regardless of the employee’s

		Negotiating Unit and overtime status.
22		Instructor: This identifies the employee as a teacher/instructor. *Note: If an employee is an Instructor, they will use the Academic calendar to identify work days. For the Academic calendar logic to work the LATS admin will need to set up the Academic Year to identify work days.*
23		Last Accrual Date: The date that the employee accrual balances were last updated via the accruals process.
24		Allow Excess Vacation Balance: If the employee will be allowed to exceed the vacation balance limit on the accrual rule check this box.
25		Comp Over 40 Eligible: if the employee signed up to participate in the Comp Over 40 program check the box.
26		Enforces Punch Restriction: No longer used in LATS. Disregard field.
27		Veteran: if the employee is a veteran of the US military check this box.
28		Accrue Non Comp: If the employee is allowed to bank the time worked between their normal hours per week and 40 hours check this box. The most common scenario is for a 7.50 hour per day employee. This type of employee works 37.50 hours per week. Any time worked between 37.50 and 40.00 can be accrued as non-comp time and used at an additional date for paid time off.
29		Num of Weeks OT Applies: If the Method of Recording OT is set to Timesheet or

		Overtime tab the default is 1 week. If the Method of Recording OT is set to Additional Time the values available are 1 week or 4 weeks. (Most clients will use the 1 week value. If you are unsure of which option to select please contact your client support representative)
30		Timesheet Validation: forces the timesheet to validate against the schedule planner or based on Hours/Days/Pass days. LATS will default to HRS/DAYS and AWS in Timesheet Validation. If your organization requires validation based on the Schedule Planner, choose SCHEDULES from the drop-down list.
31		Dynamic Percent: Applies to PT employees only. If checked, employees will earn accruals based on the hours worked for each PP.
32		Biweekly Total: This field can be checked for overtime ineligible employees. If this is checked LATS will look for the total hours necessary per pay period (75/80) versus daily hours (7.00/7.50/8.00) or a weekly total (37.50/40.00)
33		Occasional Employee: Options are Yes or No. LATS will not mark a timesheet as missing if the Occasional Employee check box is set to Yes on that specific timesheet. This is used for employees that have irregular work schedules.
34		Freeze Vacation Earnings: This applies to employees that go from full time to part time status. It will not allow

		employees to earn accruals at the new part time percentage until their vacation balance is under the new leave max rule.
35		Comment: Enter any applicable comments regarding the employee. *For example, note the date of transfer from a different agency and the agency name.*

Assigning Supervisors

A supervisor in LATS is a person who is authorized to approve the timesheet of another employee; an alternate is a person who is authorized to perform that function in the absence of a supervisor. Alternates are assigned to supervisors; when Person B is assigned as the alternate to Person A, all persons whose timesheet can be approved by Person A may also have their timesheets approved by Person B. Supervisors and Alternates are currently assigned in a direct supervisor chain.

Agencies often wish to assign another employee in the supervisor's section that will have the ability to approve timesheets in the supervisor's absence. Care must be taken to ensure that this action does not give the alternate the ability to approve his/her own timesheet.

Example

Supervisor A approves Employee A, B and C. If employee A is designated as an alternate for Supervisor A, that employee will have the ability to approve their own timesheet. The correct assignment of alternates would be Supervisor A's immediate supervisor and that supervisor's supervisor.

You may however, choose, as an alternate, another supervisor in that unit if that supervisor does not report to Supervisor A.

When an employee opens a timesheet, LATS checks to ensure that the employee has a designated supervisor for the pay period covered by the timesheet. If no supervisor has been indicated for the pay period, LATS will display an error message (No Supervisor Selected) on the employee's timesheet. LATS will not allow the employee to submit a timesheet if no supervisor has been assigned. If your organization requires an administrator to assign a supervisor, the employee will be required to contact an administrator and request that action.

LATS provides the following methods for assigning supervisors and alternates:

- Authorizing Supervisors by Section
- Assigning a Supervisor to an Individual Employee

Note: An employee will not appear in the drop-down list unless he has been designated as a Supervisor on the Security Role screen, thus authorizing that employee as a supervisor.

Assigning Supervisors

To authorize an individual as a supervisor:

LATS ADMIN > USERS > SUPERVISOR TAB

Step#	Start Window	Action
1	Home Page	
2	Users	Search tab: Enter at least the last name of the employee whom you want to authorize as supervisor. If you use a first name, it should precede the last name.
3		Click on the employee name.
4		On the General tab scroll down to the Roles section and check the Supervisor box.
5		Click Save.

Note: You may also designate an employee as a supervisor by clicking in the Supervisor Role box on the Supervisor Assignments screen. From Supervisor Assignment screen, enter the supervisor's name and, from the list displayed, click on employee name. When the name is displayed, place a check in the Supervisor Role box by clicking in the box and saving. The employee may now be chosen from the drop-down list of Supervisor names.

After you designate an employee as a supervisor and assign employees to that supervisor, the supervisor's name will appear as underlined and in blue on the security page. Clicking on the supervisor name will display a list of direct approvals, with employee information.

Authorizing Supervisors by Section

Supervisors are those people authorized to approve the timesheets of others. To authorize supervisors for employees within a section:

ADMIN > SUPERVISOR ASSIGN Search by: Select Section

Step#	Start Window	Action
1	Home Page	
2	Admin	
3	Supervisor Assign	Agency: Select the agency you want to examine from the drop-down list.
4		Division: Select the division, in any, within that agency from the drop-down list.

5		Bureau: Select the bureau, if any, within that division from the drop-down list.
6		Section: Select the section, if any, within that bureau from the drop-down list.
7		Click SEARCH.
8		Click on an employee name in the Employee field.
9		Supervisor: Select the desired supervisor from the Supervisor drop-down list.
10		Click SAVE.

Assigning a Supervisor to an Individual Employee

When a new person enters your agency, or when a person is transferred from one section to another, it will be necessary to assign that person a supervisor.

To assign a supervisor to an individual employee:

LATS ADMIN > SUPERVISOR ASSIGN Search by: Select employee

Step#	Start Window	Action
1	Home Page	
2	Admin	
3	Supervisor Assign	Employee: Enter the name of the employee to whom you want to assign a supervisor.
4		Click SEARCH.
5		Locate the name of the employee to whom you want to assign a supervisor.
6		Click on the name in the Employee field.
7		Supervisor: From the drop-down list, select the name of the supervisor you want to assign to the selected employee.
8		Click SAVE.

Note: If a supervisor change is required after a timesheet is established and saved, you must also correct the supervisor on the established timesheet. You may change the Supervisor and the 1st Alternate on an established timesheet by clicking on Supervisor on the employee's timesheet. A list of the employee's supervisor and all alternates will be displayed.

CHANGE SUPERVISOR: enter the name of the new supervisor and SEARCH. From the list of supervisors displayed, choose the new supervisor by clicking SELECT. YOU may also correct the 1st Alternate following this procedure. Click CLOSE WINDOW.
Viewing All Employees Assigned to a Supervisor.
On occasion, it is useful to produce a listing of all employees who are direct reports to a particular supervisor.

Example

A supervisor retires and his direct reports and alternates need to be reassigned to a new supervisor. The ability to identify all the employees supervised will ensure all employees are reassigned and all alternates are corrected.

To view all direct reports to a supervisor:

ADMIN > SUPERVISOR ASSIGN Search by: Select Supervisor from the drop-down list.

Step#	Start Window	Action
1	Home Page	
2	Admin	
3	Supervisor Assign	Enter the name of the supervisor whose reports you want to view.
4		Click SEARCH.

Reassigning a Supervisor's Direct Reports

To reassign all direct reports from one supervisor to another:

ADMIN > SUPERVISOR ASSIGN by: Select Supervisor from the drop-down list.

Step#	Active Window	Action
1	Home Page	
2	Admin	
3	Supervisor Assign	Enter the name of the supervisor whose reports you want to view.
4		Click SEARCH.
5		In the Supervisor column, click the name of the supervisor whose current reports you want to change.
6		From the drop-down list, select the name of the new supervisor.

7		The message "Are you sure you wish to re-assign [Previous supervisor] direct reports to [New Supervisor]?" will be displayed.
8		Click OK to confirm.

Note: You are reassigning a Supervisor if you click OK. Click CANCEL if you are trying to reassign an employee to a new supervisor and follow the procedure in "Assigning a Supervisor to an Individual Employee".

Working with Alternates

An alternate, in the LATS context, is a person authorized to review and approve (or unsubmit) timesheets of employees who are direct reports to another supervisor.
In order for an individual to be selected as an alternate, that individual must have the security role of Supervisor. See "Authorizing a Supervisor" for details.

Assigning Alternates to Supervisors

Alternates are assigned to supervisors; therefore, all employees who are direct reports to a particular supervisor will have the same set of alternates.

Note: If your agency has employees choose their supervisors, this rule is not applicable.

To assign one or more alternates to a supervisor:

ADMIN > SUPERVISOR ASSIGN Search by: Select Supervisor from the drop-down list.

Step#	Active Window	Action
1	Home Page	
2	Admin	
3	Supervisor Assign	Enter the name of the supervisor whose reports you want to view.
4		Click SEARCH.
5		In the Supervisor column, click the name of the supervisor whose alternates you want to add.
6		Click EDIT SUPERVISOR.
7		Alternate 1: Select the name of the 1st Alternate from the drop-down list. (Repeat this process for additional alternates)
8		Click SAVE.

Changing Alternates Assigned to a Supervisor

As changes occur, it may become necessary to change the alternates assigned to a particular supervisor.

To change a supervisor's alternates:

ADMIN > SUPERVISOR ASSIGN Search by: Select Supervisor from the drop-down list.

Step#	Active Window	Action
1	Home Page	
2	Admin	
3	Supervisor Assign	Enter the name of the supervisor whose reports you want to view.
4		Click SEARCH.
5		In the Supervisor column, click the name of the supervisor whose alternates you want to add.
6		Click EDIT SUPERVISOR.
7		Alternate 1: Select the name of the new 1st Alternate. from the drop-down list.
8		Repeat this process for additional alternates.
9		Click SAVE.

Note: Deleting or changing a supervisor does not delete or correct the information when that supervisor is assigned as an alternate. The supervisor will remain as an alternate until deleted or corrected manually by an administrator.

Chapter 6: Security Roles

Topics Discussed In This Chapter:

- Assigning Security Roles
- Limiting Security by Segmentation

Employees will require the User Role to be able to access, create and submit their timesheets. User ids will also have to be assigned for each employee before they can begin to use LATS. Additional employee access will require setting the appropriate security roles for that employee.

Security roles may be assigned either by the employee name or by using the organizational structure. Each search method results in a list of employees (either those that match the name you have entered or those who are assigned to the unit you have selected). If you are limiting rollout of LATS to one group of employees, and you know that all employees are correct as assigned, you may benefit by using the Division/Bureau/Section method.

Assigning Security Roles

This section covers the following methods for assigning security roles to employees:

- Assigning Security Roles by Employee Name
- Assigning Security Roles by Division
- Assigning Security Roles by Bureau
- Assigning Security Roles by Section

Assigning Security Roles by Employee Name

ADMIN > SECURITY ROLES

Step#	Active Window	Action
1	Home Page	
2	Admin	
3	Security Roles	Assign Roles by: From the drop-down list, select Employee Name.
4		Enter the full or partial employee name.
5		Click Search.
6		Click on the employee name and then click on the required roles for the employee.
7		If the employee needs their password reset, check the Reset Password check box.
8		Click Save.

Assigning Security Roles by Division

ADMIN > SECURITY ROLES

Step#	Active Window	Action
1	Home Page	
2	Admin	
3	Security Roles	Assign Roles by: From the drop-down list, select Division. The page will be displayed to allow you to choose the required Division.
4		Agency: From the dropdown list select the appropriate Agency.
5		Division: From the drop-down list, select the division from which you want to assign security roles to employees.
6		Click Search.
7		For each employee that returns in the search list select the appropriate security roles.
8		If the employee needs their password reset, check the Reset Password check box.
9		Click Save.

Assigning Security Roles by Bureau

ADMIN > SECURITY ROLES

Step#	Active Window	Action
1	Home Page	
2	Admin	
3	Security Roles	Assign Roles by: From the drop-down list, select Division. The page will be displayed to allow you to choose the required Division.
4		Agency: From the dropdown list select the appropriate Agency.
5		Division: From the drop-down list select the appropriate division.

6		Bureau: From the drop-down list, select the appropriate bureau from which you want to assign security roles to employees.
7		Click Search.
8		For each employee that returns in the search list select the appropriate security roles.
9		Click Save.

Assigning Security Roles by Section

ADMIN > SECURITY ROLES

Step#	Active Window	Action
1	Home Page	
2	Admin	
3	Security Roles	Assign Roles by: From the drop-down list, select Division. The page will be displayed to allow you to choose the required Division.
4		Agency: From the dropdown list select the appropriate Agency.
5		Division: From the drop-down list select the appropriate division.
6		Bureau: From the drop-down list select the appropriate bureau.
7		Section: From the drop-down list, select the appropriate section from which you want to assign security roles to employees.
8		Click Search.
9		For each employee that returns in the search list select the appropriate security roles.
10		If the employee needs their password reset, check the Reset Password check box.
11		Click Save.

Note: Please see the separate LATS Security Role addendum.

Limiting Security by Segmentation

An additional limitation may be designated for employees who are given Time Records, Personnel, Payment Rosters, Timekeeper Assignees, Punch Detail, Delegates, Cost Splits and Searches (Timesheet, User, Schedules) in LATS**.**

Example

A Personnel Coordinator assigned to several Sections will need to view timesheets for all of the employees in those sections. Employee will be given access to HR under Security Role and all sections required (with the exception of the section where the employee is currently located) will be added under Segmentation.

Step#	Active Window	Action
1	Home Page	
2	Admin>Users	Enter the name of the employee and click search.
3		Click on the employee row.
4		Click on the General tab.
5		Assign one of the following security roles: Time Records, Personnel, Payment Rosters, Timekeeper Assignees, Punch Detail, Delegates, Cost Splits.
6		Click SAVE.
7		A Segmentation link will be displayed under the security roles section of the page.
8		To add a segmentation record, click on Segmentation link. Choose the desired Agency/Division/Bureau/Section from the drop-down lists and click ADD. A reminder will be displayed to confirm your change. All areas that the employee may access will be displayed under Access Code in bottom segment of screen. LATS will display a % if all can be accessed.
9		To delete additional areas, click SEGMENTATION next to employee’s name. Place a check in the box under “Delete Check” column. Click REMOVE SELECTED. A reminder will be

		displayed to confirm your change.

Chapter 7: Timesheets

Topics Discussed In This Chapter:

- Types of Timesheets on LATS
- Timesheet Features and Administrator Edits
- Error Codes and Notice on Timesheets
- Links on Timesheet

Types of Timesheets on LATS

LATS provides two basic timesheets. An employee's Negotiating Unit, Grade, Overtime Eligibility and rules set within your organization determine the type of timesheet the system displays. *Note: Employees that have the Default Present Absent checked on the Accruals tab will have the Present Absent timesheet regardless of the built in edits that usually determine the type of timesheet that an employee will use.*

Present/Absent Timesheets

Present/Absent timesheets display only Present and Absent boxes. No Day In/Day Out or Lunch in/Lunch out fields will be displayed. The employee will complete the timesheet by clicking in the Present box if they are at work and the Absent box if they are not at work. If employee works part of the day and charges time for the remainder of the day, they must click both Present and Absent and enter charge accruals. Employees complete charges to accruals in the same manner as Time In/Time Out employees.

Time In/Time Out Timesheets

Employees required to complete Time In/Time Out timesheets must complete the Day In and Day Out fields. Lunch Out and Lunch In will also need to be entered if required by your organization and by employee's normal work schedule.

Timesheet Features and Administrator Edits

The LATS timesheet has many features which allow employees to view information which is not displayed on the face of the timesheet. Employees may use the Audit Screen to view all adjustments to timesheets, including initial balance amounts; they may also view a summary of their previous timesheets. Employees may also add Emergency Contact information, print their timesheet (single or range of timesheets), and change their password.

Audit Link *(Available to all employees)*

Clicking this label opens a new window which displays a list of adjustments completed on LATS, including initial balance accrual amounts, adjustments completed by administrators, and accruals deducted for tardy time. Information includes the date on which a particular adjustment took effect, the amount of the adjustment, and the reason for the adjustment. Any information created on the Adjustment tab of the LATS Admin > Accruals > Adjustment screen will be displayed.

LATS displays this label on all timesheets. The information on this page can be exported to MS Excel by clicking on the Download Excel Report.

Summary ***(Available to all employees)***

Clicking this label opens a new window which displays a Timesheet Summary. Information displayed includes timesheet pay periods (including dates), timesheet status (submitted, processed, etc.), Full Pay Status *(A value of Y in this field means that employees will earn accruals for the pay period, If this value is N, the employee is not entitled to earn accruals*) tardy time, Vacation time used, Personal time used, Comp time used, Comp Time paid, Comp Over 40 Earned, Comp Time Earned, Misc. Leave used, VRWS Used, VRWS Earned and Part Time paid extra. LATS displays the Summary link on all timesheets.

Profile ***(Available to Administrators and limited availability to some supervisors and employees)***

Clicking this label opens a window showing selected information from Edit Employee, Appointments and Accruals. Administrators can change information in this window; when saved, these changes will take place immediately on the timesheet.

Note: Changing information on this screen will not correct the "master" record for this employee.
***Note: Supervisors of a timeclock user are allowed access to the Profile link to change AWS status and passdays)*
****Note: When the config setting AllowUserExpectedHoursMod is enabled, employees will have access to the profile link and can only change the Week1/Week2 expected hours on the timesheet profile. All other fields are locked down)*

Copy ***(Available only to Time Records role)***

Clicking this label allows an administrator to copy a previous timesheet to the next timesheet. This is useful when completing timesheets for an employee on extended leave or where the same leave accruals or miscellaneous leave codes are charged each period. Employee timesheets do not display this label.

Delete ***(Available only to Time Records role)***

Clicking the Delete button will prompt the Time Records user to confirm that they want to delete the timesheet and all entries. Deleting a timesheet sets the Status back to New Timesheet.

Notes ***(Available to all employees)***

Clicking this label allows users to add notes to the current timesheet. If the timesheet has been processed, LATS displays any notes added to the timesheet. LATS displays this label on all timesheets.

Contact Info ***(Available to employee for update and limited information available to the supervisor in read-only mode)***

If this feature is enabled, clicking this label opens a new window in which an employee can update contact information for notification in case of emergencies. This information is not available to supervisors or administrators and cannot be displayed by them.

Print and Print All

Clicking on the Print link allows the user to print a timesheet that contains just the information on the timesheet tab. After clicking the Print link the employees has the option to print a single timesheet (Print button) a Range of timesheets (Range button) or Close the window.

Clicking on the Print All link allows the user to print a timesheet that contains information from the timesheet tab, Workers Comp tab TDS tab and Payments tab. After clicking the Print link the employees has the option to print a single timesheet (Print button) a Range of timesheets (Range button) or Close the window.

Error Codes and Notice on Timesheets

LATS displays color-coded error messages when it encounters errors on timesheets.
The codes and colors display at the top left of the body of the timesheet; the column header for the day in which the error occurred will be colored to match the error code color. Table 1 contains the error codes, the color associated with each, the cause of each and a possible remedy.

Note: Because the column header can display only one color at a time, columns which contain multiple errors may require several iterations before all errors are corrected.

Table 1. Timesheet error codes

Code	Color	Error	Possible Remedy
24 Hour Error	Blue	Time Worked +charges are greater than 24 hours for the day	Check AM/PM designations on Time In/Time out fields. LATS defaults to Time In as AM and Time Out as PM. Also check for incorrect tardy minutes entry that may have caused LATS OT.
Over Charge Error	Orange-Red	Charges to leave credits for a day are greater than the amount available on that day	Check charges against available accruals. Example: Employee may have charged

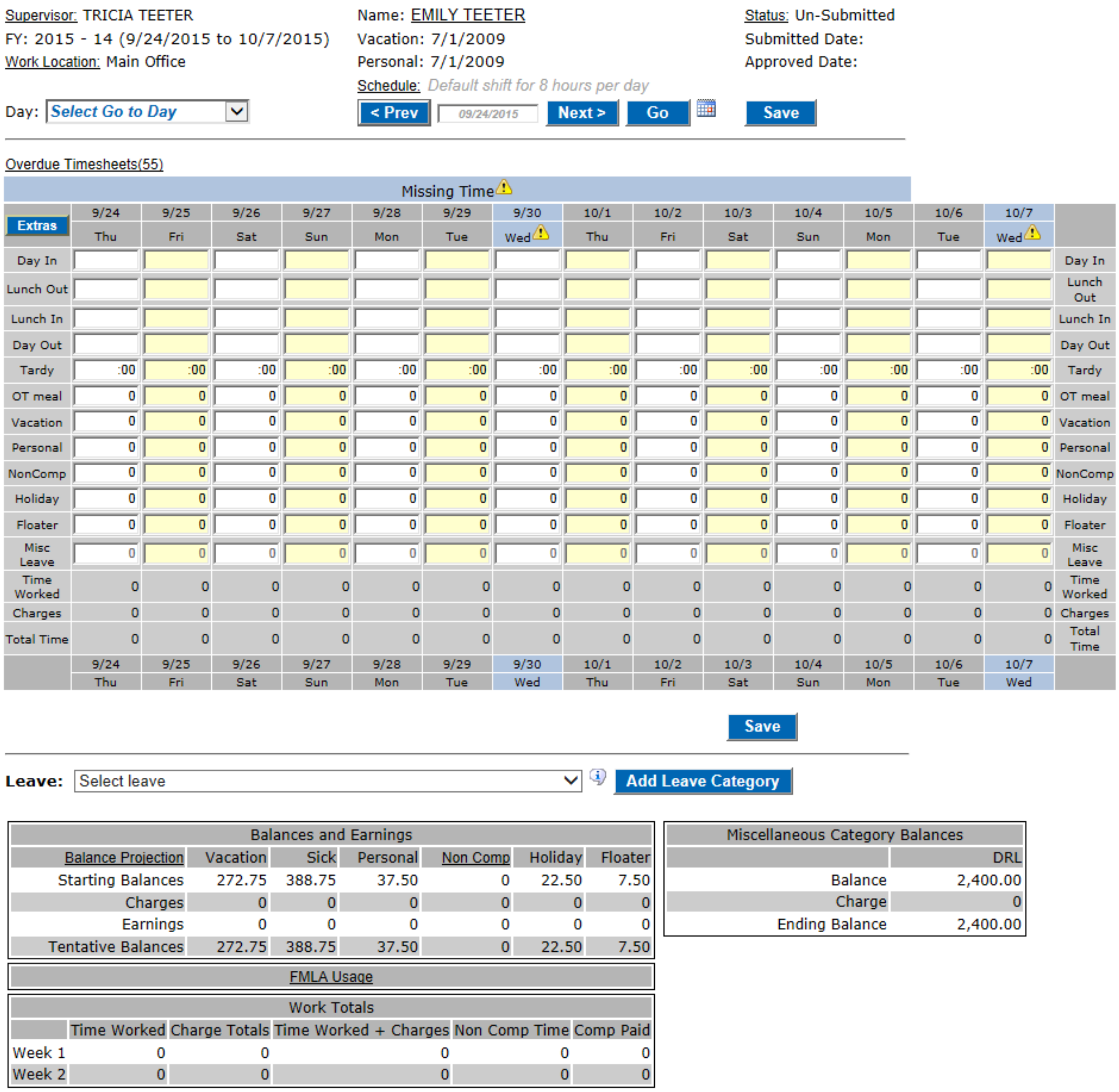
			Holiday instead of Floater or 4 hours of Personal Leave when only 2 hours are available. Employee may have charged accruals before they are available.
Excess Time Allocated	Yellow	Charges to accruals for a day are greater than the normal hours to be worked for that day. Check at bottom of timesheet under Total Time. If total time worked exceeds the normal Pass day, check to make sure employee did not enter excessive accruals. Charges to Accruals on a Pass day.	Check at bottom of timesheet under Total Time. If total time worked exceeds the normal Pass day, check to make sure employee did not enter excessive accruals. Check for charges to accruals on the employee's Pass day.
Incomplete Time	Pink	One of the two required pairs (Day In/Day Out or Lunch Out/Lunch In) is not complete; OR One of the extra In/Out Pairs is not complete	Check for all Time In/Time Out entries. Make sure Lunch Out/Lunch In times are entered. If employee has Extra Time, make sure all pairs are entered.
Some Other Error	Orange	Catch-all category, including such errors as: Pair entries are reversed; Time was earned on a weekend or Pass day	Check for reversed entries on fields.
Missing Time	Light Steel Blue	Time worked + charges entered do not equal a normal work day, work week, or pay period, depending on your position.	Check for total hours worked. Hours entered need to meet or exceed (overtime) normal work schedule
Comp Time Error	Lime Green	Total hours worked are greater than a	

		normal work day and excess is not properly accounted for as Earned Non Comp or Paid Overtime or CompOV40 OR Earned Non Comp or Paid Overtime or CompOV40 is claimed for a day when total hours worked do not exceed normal work day; OR Earned Non Comp or Paid Overtime or CompOV40 is claimed by an employee who is not eligible for it; OR For an AWS employee, the total hours worked for the week are greater than the expected for the week and the excess is not properly accounted for as Earned Non Comp or Paid Overtime or CompOV40.	Check for overtime entry. Make sure all overtime is entered in the correct category. If employee is designated as Comp OV 40, all overtime over 40 hours per week must be entered on that line until the maximum is reached. LATS enforces balances on a day to day basis.
TDS Mismatch	Aqua	The employee is required to enter TDS, and the time recorded for TDS does not match the work time on that day.	Check totals worked per day against TDS entries. Correct entries.
Quarter Hour Error	Dark Green	A charge is made in less than a quarter hour increment but is required to be in quarter hour increment.	Check for time in/time out entries that do not round to the nearest quarter hour.
Sick Leave Notice	Bisque	The number of consecutive days charged to sick leave	No action necessary. Timesheet may be

		requires medical documentation to be provided. The number of days is configurable such that this message may never appear	submitted with this message. Employee should submit documentation as required by organization
Misc. Leave Over Charge	Red	Charges to a miscellaneous leave category exceed the amount available on that day	Check charges to miscellaneous leave. Employee may have exceeded available balance or maximum amount allowed.
Miscellaneous Payments Exist Unapproved or Miscellaneous payments exist	Clear — text only	Payments have been entered on the payment page of the timesheet	No action required by administrators. Informational display only. A supervisor must approve payments before approving timesheets.
Lateness Overcharge	Yellow	Text of this message is configurable. Displayed if the tardy credits are exceeded. Dependent on the Organization's tardy policy.	Check tardy minute entry. Amount entered may exceed the amount actually allowed regardless of accrual charges. No color message is displayed when accruals are charged for tardy minutes. Text only message.
Missing Lunch Minutes	Peach	Error message is displayed if lunch is required and the employees has not taken the appropriate number of required lunch minutes.	Employee must charge the minimum number of minutes for the Lunch Out/Lunch In total lunch minutes.

Links on Timesheet

There are several areas on the LATS timesheet that, when opened, will display additional fields or information.



Supervisor: TRICIA TEETER
FY: 2015 - 14 (9/24/2015 to 10/7/2015)
Work Location: Main Office
Name: EMILY TEETER
Vacation: 7/1/2009
Personal: 7/1/2009
Schedule: Default shift for 8 hours per day
Status: Un-Submitted
Submitted Date:
Approved Date:
Day: Select Go to Day
< Prev | 09/24/2015 | Next > | Go | Save

Overdue Timesheets(55)

Missing Time

Extras	9/24 Thu	9/25 Fri	9/26 Sat	9/27 Sun	9/28 Mon	9/29 Tue	9/30 Wed	10/1 Thu	10/2 Fri	10/3 Sat	10/4 Sun	10/5 Mon	10/6 Tue	10/7 Wed	
Day In															Day In
Lunch Out															Lunch Out
Lunch In															Lunch In
Day Out															Day Out
Tardy	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	Tardy
OT meal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	OT meal
Vacation	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Vacation
Personal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Personal
NonComp	0	0	0	0	0	0	0	0	0	0	0	0	0	0	NonComp
Holiday	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Holiday
Floater	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Floater
Misc Leave	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Misc Leave
Time Worked	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Time Worked
Charges	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Charges
Total Time	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Total Time
	9/24 Thu	9/25 Fri	9/26 Sat	9/27 Sun	9/28 Mon	9/29 Tue	9/30 Wed	10/1 Thu	10/2 Fri	10/3 Sat	10/4 Sun	10/5 Mon	10/6 Tue	10/7 Wed	

Save

Leave: Select leave | Add Leave Category

Balances and Earnings

Balance Projection	Vacation	Sick	Personal	Non Comp	Holiday	Floater
Starting Balances	272.75	388.75	37.50	0	22.50	7.50
Charges	0	0	0	0	0	0
Earnings	0	0	0	0	0	0
Tentative Balances	272.75	388.75	37.50	0	22.50	7.50

Miscellaneous Category Balances

	DRL
Balance	2,400.00
Charge	0
Ending Balance	2,400.00

FMLA Usage

Work Totals

	Time Worked	Charge Totals	Time Worked + Charges	Non Comp Time	Comp Paid
Week 1	0	0	0	0	0
Week 2	0	0	0	0	0

Supervisor

Clicking this link will allow employees, and administrators, to change employee supervisor information. If the employee completes this transaction, and the associated e-mail configurations are enabled, an e-mail will be sent to the gaining supervisor AND the losing supervisor as well as a third party email *(if configured)*.

Note: If an employee makes this change it updates their main profile (Admin>User). If this is performed by a Time Records user it does not update the main profile, nor does it send out the e-mail.

Work Location

If enabled, click this to display all available work locations. The employee would click this link to change their work location.

Employee Name

Displayed at the top center of the timesheet. Clicking the employee name will display static employee information (excluding Social Security number) This is a read only screen and displays partial information from several of the employee admin record tabs.

Status

Clicking this link will display all information relating to when and by whom the timesheet is submitted, approved, and processed.

Outstanding Timesheets

If this link is displayed, the employee has not submitted all required timesheets. Clicking the link will display a list of outstanding timesheets. Clicking the timesheet data displayed on that list will display that timesheet.

Extras
Clicking this field will open three extra sets of Time In/Time Out on the timesheet. These extra punch pairs are used when the employee takes leave during the work day but returns to work.

Balance Projection

Clicking this link will allow the employee to enter a projection date, using the calendar to set that date. LATS will run a projected balance for the projection date, assuming that the employee does not charge any accruals between the current data and the projected date.

Note: This is ONLY a projection of future earnings. It cannot take into account any future time off.

Non Comp

Clicking on this link will display all available non-comp accruals. Accruals will be displayed for the previous fiscal year and the current fiscal year.

FMLA Usage

This link displays the Max Allowed FMLA time, FMLA Used and Remaining FMLA time available for the employee. Charges to FMLA will only appear in this link if the Enhanced FMLA is enabled and charge codes are configured to apply towards Enhanced FMLA.

Chapter 8: Accruals Processing

Topics Discussed In This Chapter:

- Running the Accrual Process
- Accrual Processing Errors
- Resetting the Accrual Process
- Accrual Status – Process Tab

After timesheet are submitted and approved, it is necessary to run the Accrual Process. This "finalizes" the accruals on the timesheets and prepares timesheet information for transfer to TDS, reports and the payment interface function. The accrual process may be run for all employees or for an individual employee, depending on what is chosen from the drop-down lists and may be run multiple times. Only approved timesheets are affected by the Accrual Process.

Running the Accrual Process

For all employees

To complete the accrual process for one or more payroll periods for all employees:

ADMIN > ACCRUAL PROCESS

Step#	Active Window	Action
1	Home page	
2	Admin	
3	Accruals Process	Pay Cycle: Select the Pay Cycle that you wish to run the accrual process for. LATS will default to the users Pay Cycle.
4		Run For: Select All Employees.
5		Click on the Select 'From Period' radio button. Available Pay Periods will display.
6		Click on the earliest Pay Period that you want to run he accrual process for.
7		Click on the Select 'To Period' radio button. Available Pay Periods will display.
8		Click on the latest Pay Period that you want to run he accrual process for.
9		Click the Run button.
10		LATS will run the accrual process for Approved timesheets and then

		the end user will land on the Status tab.

For an individual employee

To complete the accrual process for an individual employee:

ADMIN > ACCRUAL PROCESS

Step#	Active Window	Action
1	Home page	
2	Admin	
3	Accruals Process	**Pay Cycle:** Select ADMINISTRATION or INSTITUTION from the drop-down list.
4		**Run For:** Choose SELECT EMPLOYEE from the dropdown list.
5		Enter the full or partial name of the employee and click Search.
6		Select the correct employee form the Select Employee drop down.
7		Click on the Select 'From Period' radio button. Available Pay Periods will display.
8		Click on the earliest Pay Period that you want to run he accrual process for.
9		Click on the Select 'To Period' radio button. Available Pay Periods will display.
10		Click on the latest Pay Period that you want to run he accrual process for.
11		Click the Run button.
12		LATS will run the accrual process for Approved timesheets and then the end user will land on the Status tab.

The accrual process will run and the Process Status screen will be displayed. You may need to refresh data to display the Process Complete message. Any timesheets that did not successfully process will be displayed by clicking the VIEW EXCEPTIONS link on the Status tab.

To view exceptions, click on the View Exceptions link, Select Pay Cycle, Fiscal Year From, Fiscal Year To, From Pay Period and To Pay Period and then click the View Exceptions button.

Accrual Processing Errors

Following is a list of "common" error messages that may be displayed in "View Exceptions":

Overcharge-adjustment NOT successful
Indicates an overcharge occurred. Generally should not happen, as this should be trapped before a timesheet is approved. However, if a retroactive adjustment was applied to reduce a balance, an overcharge could be trapped in the accruals process. This would prevent any unprocessed timesheets from processing even if they don't display an error.

How should I fix this?

Review timesheets to determine where the error occurred.
If the adjustment is correct, reset the timesheets, have the employee correct the timesheet that has the overcharge error and resubmit. If the adjustment was not correct, create a second adjustment to offset the incorrect one and then recreate the adjustment on the correct timesheet.

Date Missing-Timesheet Rejected
Missing vacation or personal leave date. The report will indicate which one is missing.

How should I fix this?

Reverse the approval and submittal process and add the missing date.
Have the employee resubmit, approve, and process. Be sure to add the date to the master record, either on the Edit Employee screen or on LATS ADMIN > ACCRUALS screen.

Previous Timesheet was Not Processed
A previous timesheet was not processed, so no subsequent timesheets will process.

How should I fix this?

Check for timesheets that have not been submitted and approved or that did not process for one of the other reasons listed in this section. Have the employee or supervisor complete the timesheet or correct the previous timesheet following instructions in this section.

Timesheet Not Processed-Rule Missing
An accrual rule is missing for the employee, based on their Negotiating Unit, hours per day, percent and/or possibly their years of service. The report will indicate which rule is missing.

How should I fix this?

Check the Rules Maintenance tables to determine what rule is missing and add the rule following the instructions in "Rules Maintenance".

SQL Database error-Insert/Update
This can occur if there is a data issue.

How should I fix this?

Contact LATS customer support on this issue.

A previous Timesheet is missing (does not exist)
A previous timesheet was not created (this, it is missing) for the employee.

How should I fix this?

Contact the employee and have them open, complete, save and submit the missing timesheet. Then contact the supervisor to approve the timesheet.

Resetting the Accrual Process

The accrual process may be "reversed" for all timesheets for one or more payroll periods or for an individual employee. This may be necessary if changes must be made to a timesheet once it has been processed.

To reset the accrual process for an entire Pay Period:

Step#	Active Window	Action
1	Home Page	
2	Admin	
3	Accruals Process	Click on the Accrual Reset Pay Period.
4		Screen will display the "Last Processed Period".
5		Click RESET. The message "Reset a pay period. Do you wish to reset this entire Pay Period?" will display. Click OK to confirm.

To reset the accrual process for an individual employee:

Step#	Active Window	Action
1	Home Page	
2	Admin	
3	Accruals Process	Click Reset Timesheet.
4		Enter full or partial employee name and click the Search button.
5		Select the employee name from the drop down list.
6		Select the appropriate Fiscal Year.
7		Click Refresh Grid.

8		Select the appropriate Pay Period that you want to reset for that employee.
9		Click the Reset button.
10		Confirm the timesheet reset for the employee.

Accrual Status – Process Tab

The Status tab identifies the dates that the Accrual Process was run and provides the status of that process.

The end user will have the ability to View Exceptions of timesheets that did not process when the Accrual Process was run. To View the Exceptions perform the following steps:

Step#	Active Window	Action
1	Home Page	
2	Admin	
3	Accruals Process	Click on the Status tab.
4		Click on the View Exceptions link.
5		Select the appropriate Pay Cycle from the drop down.
6		Select the correct FROM Fiscal Year and the appropriate FROM Pay Period.
7		Select the correct TO Fiscal Year and the appropriate TO Pay Period.
8		Click the View Exceptions button.

Chapter 9: LATS Payment Interface

Topics Discussed In This Chapter:

- Transmit
- Payment Audit
- Payment Transmit Status
- Hourly Payments
- Hourly Status
- Payment Splits
- HRIS^{net} Payment Report
- HRIS^{net} Payment Processing

The purpose of the LATS Payment Interface is to move payment transactions from LATS processed timesheets into HRIS' payment interface for processing in HCM or HRIS$^{net.}$ Alternatively, the interface can be configured to transmit payments via an encrypted file directly to PayServ.

Payment records are created in LATS when a timesheet is processed by running the Accruals Process. The accruals process looks for all approved timesheets, applies time and attendance rules, updates master accrual balances, and writes payments claimed on a timesheet to a holding table.

A user must be in the Time Records role to run the payment interface. Conceptually, the interface works as follows:

1. Accruals Process is run against all approved timesheets for a selected pay period.

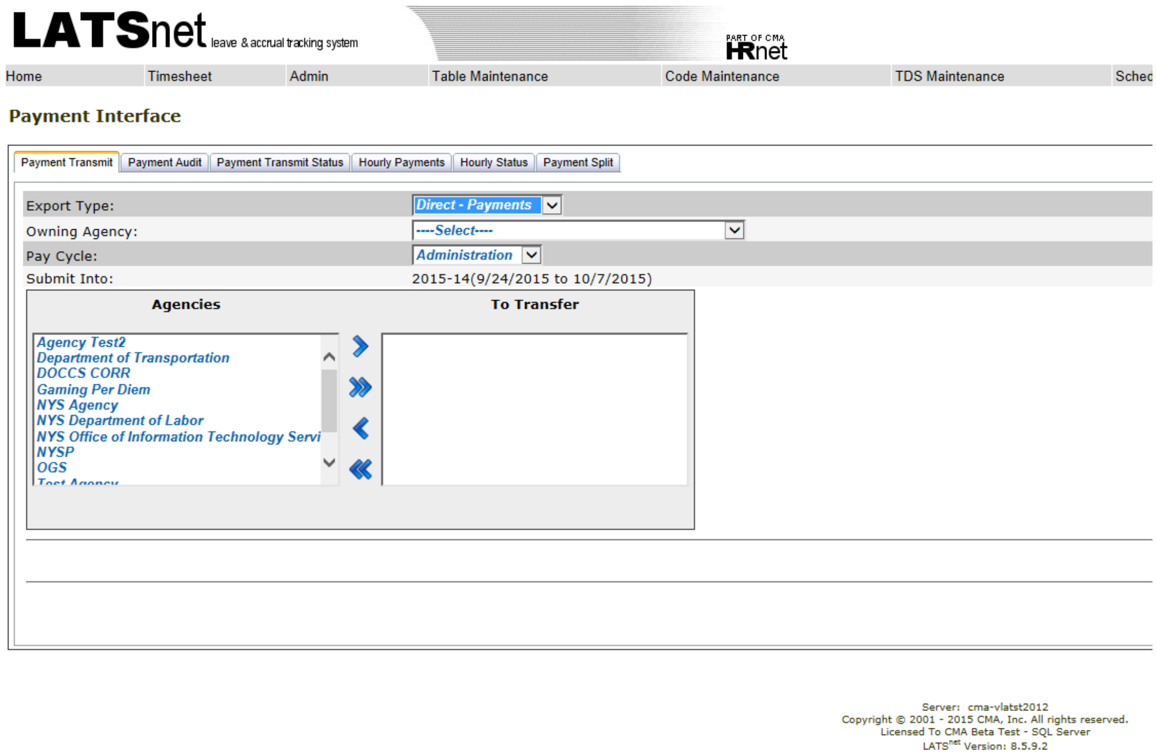
2. Timesheets with Overtime, Meals and PT Extra Time will have payment records written to a holding table in LATS.

3. Any miscellaneous payments defined by the agency (IIP, Haz Duty, Holiday Pay etc.) and recorded by an employee will also have payment records written to a holding table in LATS.

4. The holding table continues to accumulate payment records until a user transmits them to HCM or HRIS^{net} (or PayServ) for payment processing.

5. If a timesheet is re-processed in LATS (Reset and re-processed) and the existing payment record(s) has not been transmitted, it will be overwritten.

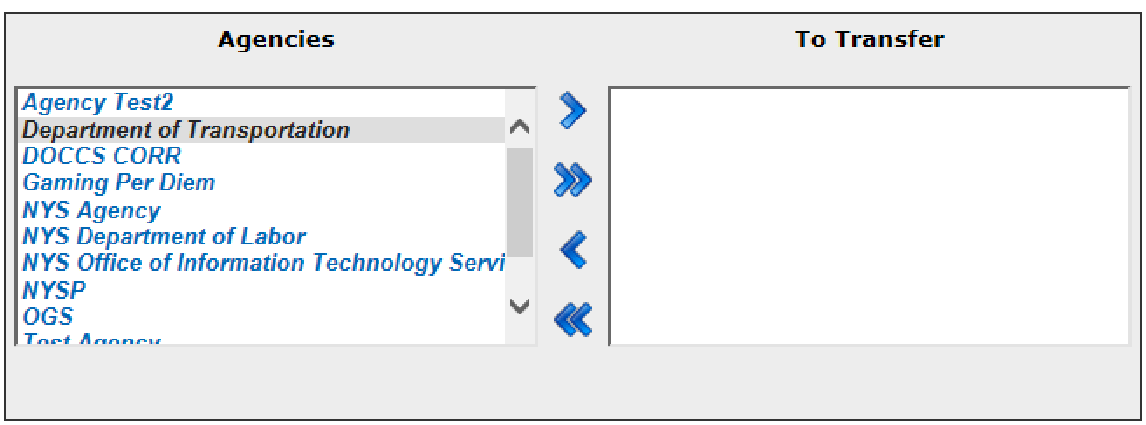
6. If the existing payment record has been transmitted, it will not be re-written to the LATS holding file. Any changes to that payment amount must be manually adjusted in HRIS^{net}, HCM or PayServ.


LATSnet leave & accrual tracking system
PART OF CMA HRnet
Home
Timesheet
Admin
Table Maintenance
Code Maintenance
TDS Maintenance
Sched
Payment Interface
Payment Transmit
Payment Audit
Payment Transmit Status
Hourly Payments
Hourly Status
Payment Split
Export Type:
Direct - Payments
Owning Agency:
----Select----
Pay Cycle:
Administration
Submit Into:
2015-14(9/24/2015 to 10/7/2015)
Agencies
To Transfer
Agency Test2
Department of Transportation
DOCCS CORR
Gaming Per Diem
NYS Agency
NYS Department of Labor
NYS Office of Information Technology Servi
NYSP
OGS
Server: cma-vlatst2012
Copyright © 2001 - 2015 CMA, Inc. All rights reserved.
Licensed To CMA Beta Test - SQL Server
LATSnet Version: 8.5.9.2

Payment Transmit

This option sends all payments marked as New or Ready to HRISnet, HCM, PayServ or another Legacy payroll system. To transmit payments the admin will need to select options for the following fields:

Step#	Active Window	Action
	Home Page	
	Admin	
		Owning Agency: Select the appropriate owning agency to be identified in the payment file. ***Not included in the Export Type = HCM.*
		Pay Cycle: Select the appropriate pay cycle to be included in the payment file.
		Submit Into: This is a read only informational field.
		Agencies: List of agencies that have payments available to transfer. Select the agency on the left and click the appropriate > to move one agency or >> to move all agencies.
		Click the Transmit button to create the payment file to be transmitted.



Payment Audit

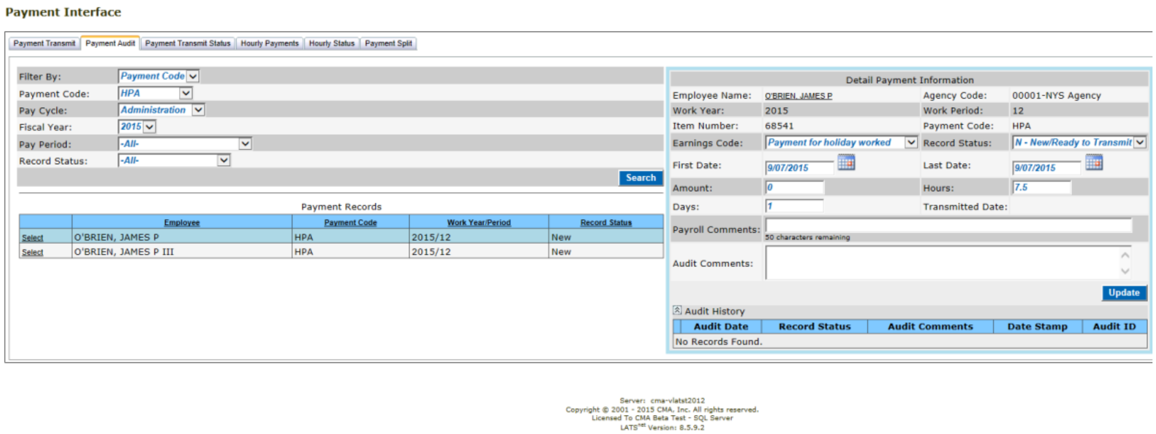
This allows a time records user to review and edit payment records that have been claimed by employees and generated by the LATS Accruals Process. Payment data can be edited, or specific payment records can be denied. All changes are written to an audit table.

When clicking on the name link, the audit detail page is displayed, where the payment can be edited or the record status can be changed to 'Denied' – which will prevent the payment from being transmitted.

Step#	Active Window	Action
	Home Page	
	Admin	
	Payment Audit	**Filter By:** Options are All Employees, Employee or Payment Code. Changing the filter to Employee brings up a search box to enter employee name to search for employee. Changing the search filter to Payment Code will display a dropdown that contains all applicable payment codes to select from.
		Pay Cycle: Select the appropriate pay cycle.
		Fiscal Year: Select the appropriate fiscal year.
		Pay Period: Select the appropriate pay period. Pay period dates are set by the pay cycle selected.
		Record Status: Options are All, New, Ready to Transmit, Transmitted, Deny Payment.

Once a record has been filtered the end user can click on the employee name and this will bring up the payment audit window displayed below. The following fields can be modified in the payment audit window prior to the payment transmit.

- Earnings Code
- Record Status – New and Ready to Transmit will send the payment. If the record is set to Deny Payment the payment will not be sent out of LATS and will remain in the payment audit table.
- First Date
- Last Date
- Amount
- Hours
- Days
- Audit Comments



Payment Transmit Status

The Payment Transit Status tab displays an Event Log of all payment transmits run in LATS. The status page provides the Date, Description and Status. If the payment interface is run and the Status equals Processed with Errors you should contact the CMA LATS Help Desk at 518-783-9003 immediately for issue triage and resolution.

Hourly Payments

The Hourly Payment interface can send hourly payments to HCM, HRIS, PayServ or a Legacy payroll system. To send hourly payments the LATS admin should perform the following tasks.

Step#	Active Window	Action
	Home Page	
	Admin	
	Payment Interface – Hourly Payments	Select the agency to transfer or select All Agencies.
		Pay Cycle: Administration or Institution
		Fiscal Year
		Pay Period

Hourly Status

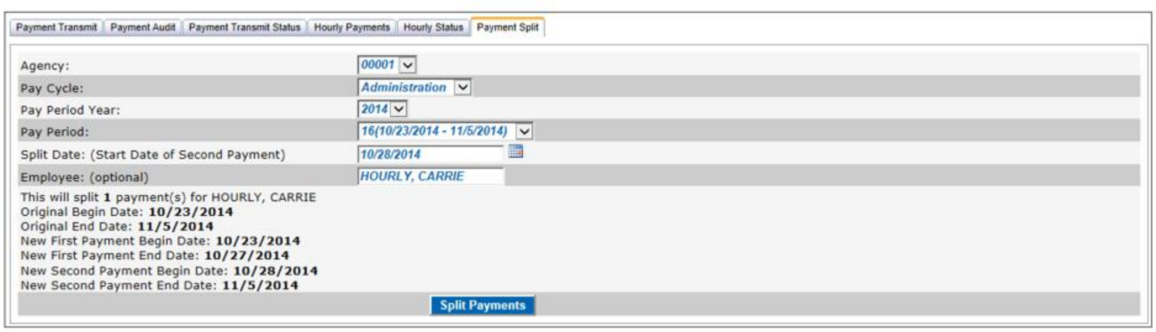
The hourly status page shows the Date, Description and Status of the hourly payment transmit. Please call the CMA LATS Help Desk at 518-783-9003 if the payment transmit status is Processed with Errors.

Payment Splits

OSC requires the hours be split into separate RGH, OTK and PS4 payments if a rate change occurs within the pay period. If an employee receives a rate change within the pay period, separate RGH payments must be created. The first payment should have an earnings begin date for the first day of the pay period (or the first day that the employee claimed hours within the pay period at the initial rate) and an earnings end date one day before the effective date of the rate change (or the last day that the employee claimed hours within the pay period at the initial rate). The second payment should have an earnings begin date equal to the effective date of the rate change (or the first day that the employee claimed hours after the effective date of the rate change) and an earnings end date of the last day of the pay period (or the last day that the employee claimed hours after the rate change). The LATS Hourly Processing module now includes a Payment Split tab to manage these payment splits. The end user should perform the following steps to create a payment split:

Step#	Active Window	Action
	Home Page	
	Admin	
	Payment Interface – Payment Split	Select the employee's agency.
		Pay Cycle: Administration or Institution
		Select the Pay Period Year
		Select the Pay Period
		Select the Split Date (Start Date of the second payment)
		Employee (optional)
		If there are payments available to split, LATS will display them and the end user will have a Split Payments button enabled.

Payment Interface



HRIS Payment Report

This report reads data from the LATS payment holding table. The report data is sorted by division, employee and pay period. The report is launched from the LATS reporting module.

Selection includes:

a. Pay Year & Period
b. Payment Status

- N=New – written to the payment holding table by the accruals process.
- R=Ready – Selected for transmission to HRIS but not yet transmitted, or selected but the transmission failed.
- T=already transmitted to HRIS.
- Null = all status for the selected pay period.

LATS - TIMESHEET PAYMENTS

Thursday, April 15, 20(

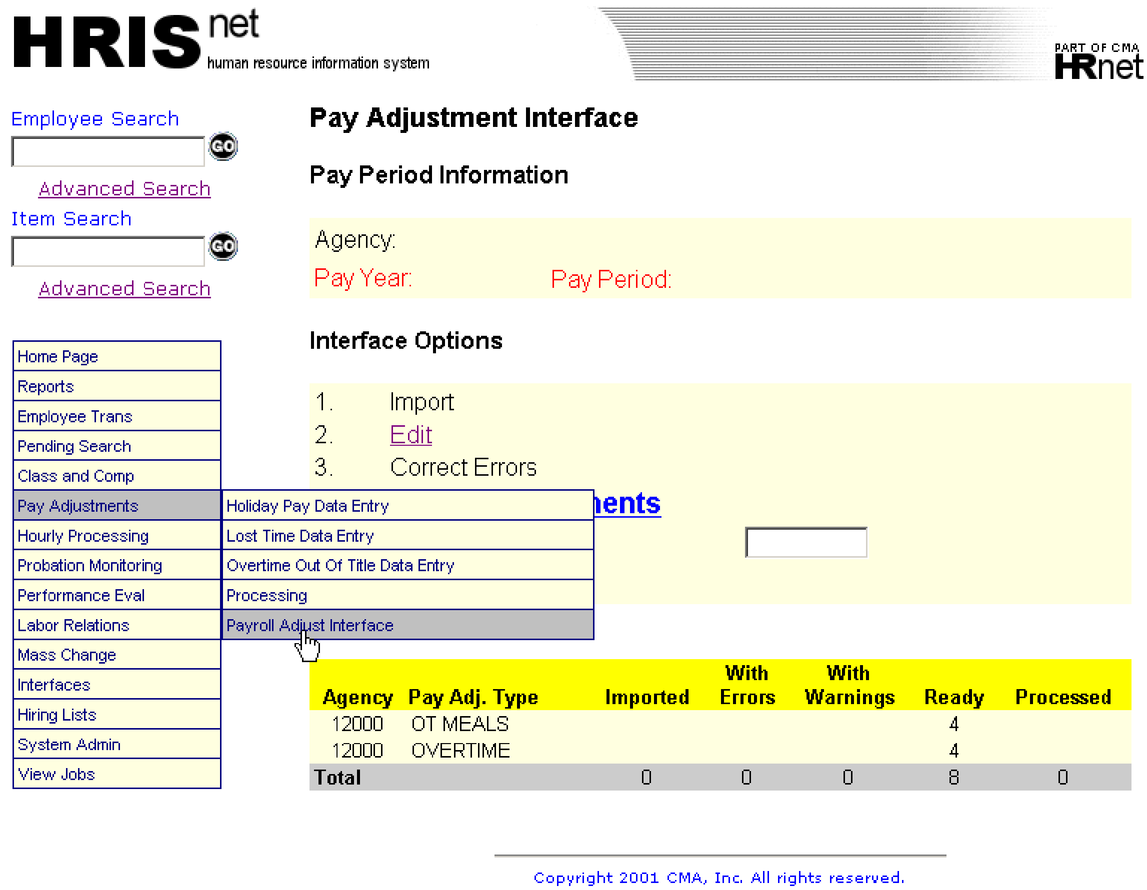
Name	Submit YR-Period	Payment Type	Record Status	First Date	Last Date	Work YR-Period	Days/ Meals	Hours
FOREST PROTECTION & FIRE MANAGMENT								
SUTTON STEVEN J	2002 7	OT MEALS	N	7/2/2002	7/3/2002	2002 7	2.00	0.00
LAW								
LANDRY BRYAN R	2002 7	OVERTIME	N	6/21/2002	7/3/2002	2002 7	0.00	20.00
WATER								
UNDERWOOD RANDY	2002 7	OVERTIME	N	6/28/2002	6/28/2002	2002 7	0.00	2.50

1

HRISnet Payment Processing

The HRIS^{net} - LATS Payroll Adjustment Interface accepts payment records created from the LATS application and performs the processing so the payments are included with the other payroll activity for a given agency code and pay period, and can be sent in one submission to PayServ. The results become part of an employee's payroll adjustment in HRIS^{net}.

Once the records are transmitted to HRIS^{net}, they remain in a holding file in HRIS^{net}. Users must go thru the Pay Adjustment Interface option in HRIS^{net}. The Pay Adjustment Interface page will be displayed.



The processing flow essentially follows the enabled links on this page. Please be sure that you have the correct processing pay period and agency code set at the top of the screen. The processing pay period is the pay period that will be submitted to PayServ.
Through all of the processing stages, the highlighted links will indicate the next course of action to take. The options are summarized below:

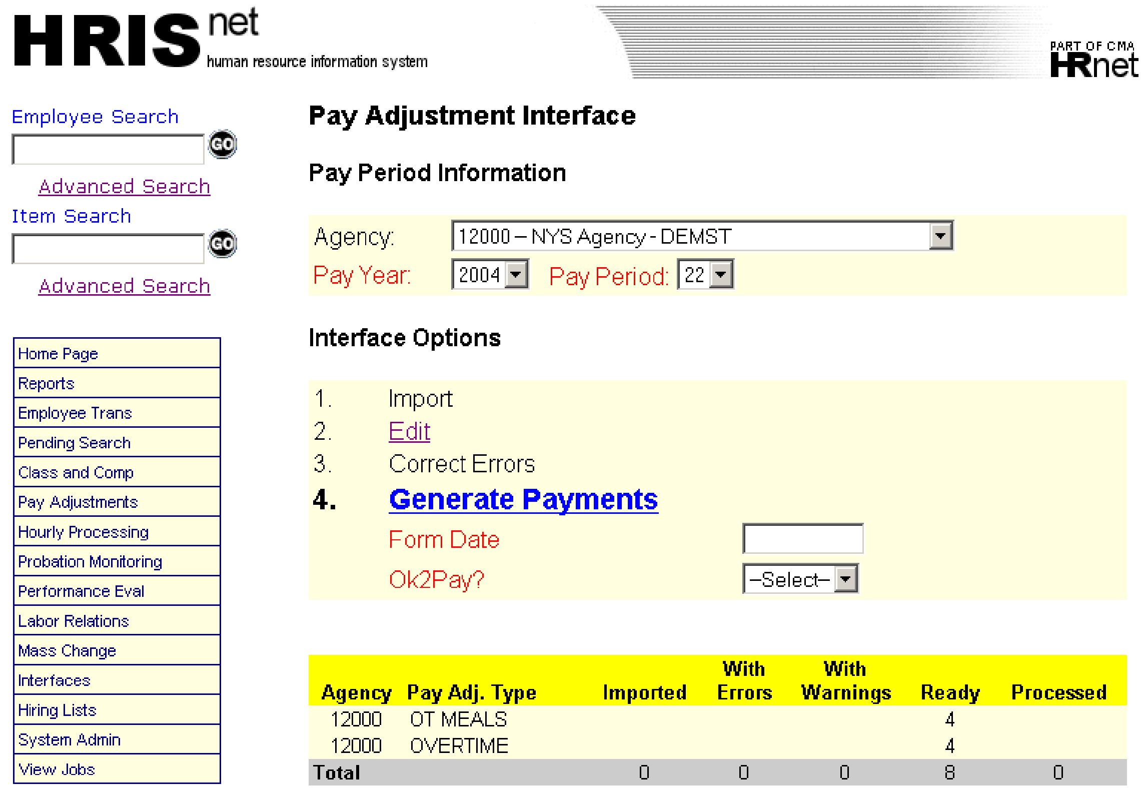
Change the processing pay period and/or agency code.

IMPORT: Records from a file transferred to the HRIS^{net} server. The data records will generally contain adjustments for the timesheet period(s) PRIOR to the indicated processing pay period. **This only applies IF data is being fed from external systems other than LATS.**

EDIT: Performs edits the payment records against the HRIS^{net} database, verifying SSN, Item number, hour increments and other information. Since the records originated in LATS, there should be no discrepancies. An adjustment must pass these edits before payment is generated.

CORRECT: Finds any erroneous or miss-assigned employee records and allows corrections to be made. Any corrections must be re-edited by running the EDIT before payments are generated.

GENERATE: Posts the payment records to the employees pay adjustment history and readies them for transmission to PayServ via the Miscellaneous payment file.


HRIS net
human resource information system
PART OF CMA HRnet
Employee Search
Advanced Search
Item Search
Advanced Search
Home Page
Reports
Employee Trans
Pending Search
Class and Comp
Pay Adjustments
Hourly Processing
Probation Monitoring
Performance Eval
Labor Relations
Mass Change
Interfaces
Hiring Lists
System Admin
View Jobs
Pay Adjustment Interface
Pay Period Information
Agency: 12000 – NYS Agency - DEMST
Pay Year: 2004 Pay Period: 22
Interface Options
1. Import
2. Edit
3. Correct Errors
4. Generate Payments
Form Date
Ok2Pay? –Select–
Agency Pay Adj. Type Imported With Errors With Warnings Ready Processed
12000 OT MEALS 4
12000 OVERTIME 4
Total 0 0 0 8 0

Chapter 10: Scheduling

Topics Discussed In This Chapter:

- Introduction to Scheduling
- Working with Shifts
- Working with Rotations
- Working with Rotation Groups
- Working with Schedules

Introduction to Scheduling

The scheduling module allows your agency to create work schedules which determine some of the rules used by LATS when checking employee timesheets.

When LATS is installed at your agency, it includes several basic shift types, which include a set of rules regarding employee timesheets. You cannot create new shift types or modify these shift types, but you can use the Web interface to learn about each of them.

In the scheduling interface, you can create lunch shifts which define a start and end time for mid-shift breaks.

The shift types and lunch shifts are combined to create shifts, which are specific to your agency. A shift includes starting and ending time ranges, and can make use of a defined lunch shift, but no lunch shift is required when you create a shift.

After creating shifts for your agency, you can then create rotations, which define which shift is to be used for each day of a pay period, including Pass days.

When all rotations for your agency have been defined, you then assign employees to the rotations. You can assign employees to the rotations in a variety of ways:

- By Division
- By Bureau within Division
- By Section within Bureau within Division
- By Negotiating Unit
- By Supervisor
- Individually

Additionally, for each individual you have the ability to create an alternate rotation which can be applied only for a given pay period.

Working with Shifts

This section covers the following scheduling procedures:

• "Examining Shift Types" explains how to obtain basic information about each of the shift types included in your LATS installation.

• "Creating Lunch Shifts" explains how to create lunch shifts which will be specific to your agency.

• "Examining Defined Lunch Shifts" explains how to examine the specifics of currently defined shifts.

• "Creating a New Shift" explains how to combine shift types, lunch shifts, and start and end times to create a series of shifts which will be specific to your agency.

• "Deleting an Unused Shift" explains how to delete a shift which is not assigned as part of any defined rotation. You may not delete a shift which is in use as part of a rotation.

Examining Shift Types

Shift types determine policies such as rounding and flex time. This procedure will help you become familiar with the characteristics of the shift types included in your LATS installation.

SCHEDULING > ADMINISTRATION

Step #	**Active Window**	**Action**
1	Home Page	
2	Scheduling	
3	Administration	Click SHIFT TYPES tab.
4		The Shift Types window shows all the shift types which have been included in your LATS installation.
5		To display a detailed explanation of a particular shift type, click the **Short Description** field for that type.

To find out what lunch shifts have already been defined for your agency and what the specifics of those shifts are:

SCHEDULING > ADMINISTRATION

Step #	**Active Window**	**Action**
1	Home Page	
2	Scheduling	
3	Administration	Click LUNCH SHIFTS tab.

4		To see all the available lunch shifts click the Search button. If you know the name of a specific lunch shift you are searching for enter the name in the description text box and click the Search button.
5		This displays the current lunch shift configuration.

Creating Lunch Shifts

The use of lunch shifts allows LATS to check the timesheet of a Time In/Time Out employee to ensure that the reported Lunch Out/Lunch In pairs are within agency guidelines. Lunch shifts also allow LATS to calculate the correct hours for the each day (7.50 vs. 8).

To create a lunch shift:

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Click on the Lunch Shift tab and then click the ADD tab.
4		Select the appropriate agency from the dropdown list or leave the agency setting to ---ALL---. Leaving the agency set to ALL will allow the lunch shift to be available to all agencies.
5		**Short Description**: A one- to 10-character descriptive title for the lunch shift.
6		**Description**: An informative description that more clearly defines the lunch hour than allowed in the **Short Description**.
7		**Start Time**: Enter the time when the lunch shift begins, in HH:MM format. AM or PM is required.
8		**End Time**: Enter the time when the lunch shift ends, in HH:MM format. AM or PM is required.
9		**Click Add.**

Reviewing a Shift:

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Click SHIFTS tab.
4		To see all the available shifts click the Search button. If you know the name of a specific shift you are searching for enter the name in the description text box and click the Search button.
5		Locate the shift you want to examine and click the **Short Description** field for that shift.
6		When you have finished examining the shift, click CANCEL.

Creating a New Shift

A shift is a combination of an installation's shift type and an agency-defined lunch shift, with start and end time periods added. Using a lunch shift is not required; when you create a shift, you may indicate that a lunch shift is not required. Shifts are used when creating rotations, which in turn are assigned to employees and used when LATS examines employees' timesheets.

To Create a New Shift:

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Click SHIFTS tab.
4		Click the ADD tab.
5		**Agency:** Select the appropriate agency from the dropdown list or leave the agency setting to ---ALL---. Leaving the agency set to ALL will allow the lunch shift to be available to all agencies.
6		**Short Description**: A one- to 10-character for the shift.
7		**Description**: Enter a description of the use of the shift.
8		**Grouping:** This is a free form text field that can be used for reporting purposes. If an agency wishes to group all employees in a certain

		department so they can run a report, they would assign all rotations to the same Grouping.
9		**Shift Type**: From the drop-down list, select which shift type this shift is associated with. **Minimum Allowable Start Time**: Enter the earliest time employees assigned to this shift are allowed to start work. The use of AM and PM is required. (Used when tied to Min2Min Flex Shift.)
10		**Start Time**: Enter the normal time employees assigned to this shift start work. The use of AM and PM is required.
11		**Maximum Allowable Start Time:** Enter the latest time employees assigned to this shift are allowed to start work. The use of AM and PM is required. (Used when tied to Min2Min Flex Shift.)
12		**Minimum Allowable End Time**: Enter the earliest time employees assigned to this shift are allowed to leave work. The use of AM and PM is required. (Used when tied to Min2Min Flex Shift.)
13		**End Time**: Enter the normal time employees assigned to this shift leave work. The use of AM and PM is required.
14		**Maximum Allowable End Time:** Enter the latest time employees assigned to this shift are allowed to leave work. The use of Am and PM is required. (Used when tied to Min2Min Flex Shift.)

15		**Auto deduct Lunch:** If set to Yes you will be required to enter a lunch shift.
16		**Minimum Hours Worked:** enter the number of hours to be worked before the lunch is auto deducted.
17		**Maximum Allowable End Time:** Enter the latest time employees assigned to this shift are allowed to leave work. The use of Am and PM is required. (Used when tied to Min2Min Flex Shift.)

Deleting an Unused Shift

To delete a shift which has **not** been assigned as part of a defined rotation:

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Click SHIFTS tab and then the search tab.
4		Click on the Short Description of the shift you wish to delete.
5		Click the delete button.
6		Confirm deletion of shift.

Note: LATS will not allow you to delete a shift which has been included in the definition of any Rotation.

Working with Rotations

This section covers the following rotations procedures:

- "Creating Rotations" explains how to combine the various agency-specific shifts and apply them to each day in a pay period.
- "Viewing Details of a Rotation" explains how to examine the shifts assigned to each day of a rotation.
- "Deleting an Unused Rotation" explains how to remove a rotation to which no employee has been assigned.
- "Assigning Rotations to Employees by Division" explains how to assign a selected rotation to all employees within a Division.

- "Assigning Rotations to Employees by Bureau" explains how to assign a selected rotation to all employees within a Bureau.
- "Assigning Rotations to Employees by Section" explains how to assign a selected rotation to all employees within a Section.
- "Assigning Rotations to Employees by Negotiating Unit" explains how to assign a selected rotation to all employees represented by a selected negotiating unit.
- "Assigning Rotations to Employees by Supervisor" explains how to assign a selected rotation to all employees who are the direct reports to a selected supervisor.
- "Assigning Rotations to Employees Individually" explains how to assign a selected rotation to an individual employee.
- "Creating Alternate Rotations by Supervisor" explains how to create a custom rotation for selected employees who are direct reports of a selected supervisor and,
- "Creating Alternate Rotations Individually" explains how to create a custom Rotation for a selected individual employee.

Viewing Details of a Rotation

To examine a currently defined rotation:

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Click the ROTATIONS tab
4		Click the Search button to return ALL rotations or enter the description or partial description of the rotation that you are searching for and click the Search button.
5		Click the **Short Description** field for the rotation you want to review.

Creating Rotations

A rotation allows you to assign shifts to each day in a pay period, as well as to assign Pass days within the pay period. You may use a different shift for each day in the pay period, you may use the same shift for each day in the pay period, or you may decide to use whatever combination allows your agency to function effectively. Rotations are assigned to employees and are used by LATS when examining employee timesheets. Rotations also act as a schedule template.

To Create a New Rotation:

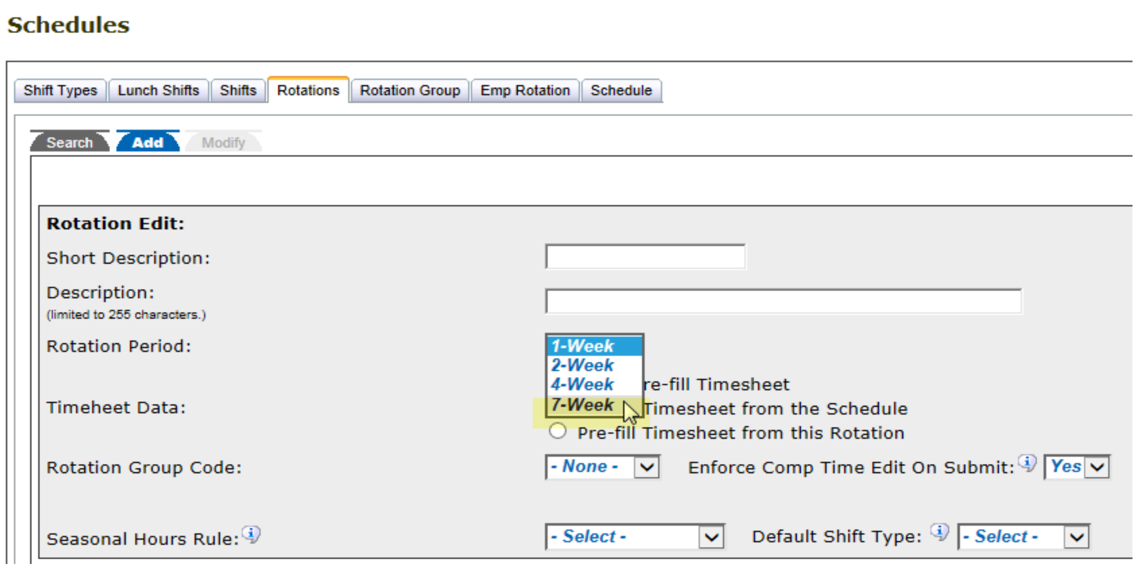
Step #	Active Window	Action
1	Home Page	

2	Scheduling	
3	Administration	Click the ROTATIONS tab.
4		Click on the Add tab.
		Agency: Select the agency from the agency dropdown or select –ALL—if the rotation should be available to all agencies.
5		**Rotations (Edit) Short Description:** Enter a one- to 10-character title for the rotation.
6		**Description:** Enter a description of the use of the rotation.
7		**Rotation Period:** From the drop-down list, select an indication of the length of time the rotation covers. Choices are 1-week, 2-week, 4-week and 7-week.
8		**Timesheet Data:** You may choose to pre-fill employee timesheets based on a Planner or Rotation. LATS will default to: DON'T PRE-FILL TIMESHEET. Pre-fill from Planner will complete timesheets for all employees in that planner with the hours selected for that planner when it is posted. Pre-fill from Rotation will complete timesheets for all employees in that rotation with the hours selected for that rotation. *Necessary changes may be made to pre-filled timesheets. Example: Employee works overtime or charges time to accruals.* *If you choose to pre-fill, click in Radio button before Prefill timesheet from Planner or Pre-fill timesheet from Rotation.*
9		**Rotation Group Code:** This field applies to the planner. All employees tied to a Rotation Group will be grouped together on the planner. LATS defaults to NONE.
10		**Enforce Comp Time Edit on Submit:** If your organization requires time in/time out entries to round to or to be entered on the quarter hour, this field must be set to Y. Setting this field to N will prevent Comp time Error from being displayed on timesheets and will allow employees to submit their timesheets regardless of daily or timesheet total hours.
11		Default Shift Type: This field tells LATS what type of rounding to apply to punches if the employee is working outside of their shift or on a pass day when there is no shift assigned to that day.

12		**For each day in weeks 1:** From the drop-down list, select the shift employees assigned to this rotation will work during week 1. ***Note: repeat the same process for weeks 2, 3, 4, 5, 6 and 7 if applicable.*
13		Click SAVE.

7 Week Rotations

The LATS Rotations feature now accommodates a 7 week (49 day) rotation. You can create a Rotation by going to Scheduling > Administration, clicking the Rotations tab, and clicking Add.



Deleting an Unused Rotation

LATS will not allow you to delete a rotation to which any employee has been assigned.

To delete an unused rotation:

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Click the ROTATIONS tab.
4		Locate the rotation you want to delete.
5		Click the **Short Description** field for that rotation.
6		Click DELETE. LATS will display an alert asking if you want to delete the rotation. Click OK to confirm.

Assigning Rotations to Employees by Division

This procedure allows you to assign a selected rotation to all employees in a division:

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Click the EMP ROTATIONS tab.
4		**Assign Rotations by**: Select DIVISION from the dropdown list.
5		**Agency:** From the drop-down list, select the agency with which you want to work. The screen will re-display.
6		**Division:** From the drop-down list, select the division with which you want to work.
7		**Assign to Rotation:** From the drop-down list, select the rotation to which you want to assign all employees of the selected division.
8		Click ASSIGN

Assigning Rotations to Employees by Bureau

This procedure allows you to assign a selected rotation to all employees in a bureau:

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Click the EMP ROTATIONS tab.
4		**Assign Rotations by**: Select BUREAU from the dropdown list.
5		**Agency:** From the drop-down list, select the agency with which you want to work. The screen will re-display.
6		**Division:** From the drop-down list, select the division with which you want to work.
7		**Bureau:** From the drop-down list, select the bureau with which you want to work.
8		**Assign to Rotation:** From the drop-down list, select the rotation to which you want to assign all employees of the selected bureau.
9		Click ASSIGN.

Assigning Rotations to Employees by Section

This procedure allows you to assign a selected rotation to all employees in a bureau:

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Click the EMP ROTATIONS tab.
4		**Assign Rotations by**: Select SECTION from the dropdown list.
5		**Agency:** From the drop-down list, select the agency with which you want to work. The screen will re-display.
6		**Division:** From the drop-down list, select the division with which you want to work.
7		**Bureau:** From the drop-down list, select the bureau with which you want to work.
8		**Section:** From the drop-down list, select the bureau with which you want to work.
9		**Assign to Rotation:** From the drop-down list, select the rotation to which you want to assign all employees of the selected bureau.
10		Click ASSIGN.

Assigning Rotations to Employees by Rotation

This procedure allows you to reassign a selected rotation to another rotation:

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Click the EMP ROTATIONS tab.
4		**Assign Rotations by**: Select ROTATION from the dropdown list.
5		To see employees that will be moved from one rotation to the other click on the View Employees button.
6		If you choose to assign an employee to a different rotation in this window, select the appropriate new rotation from the Rotation dropdown which will automatically check the Assign rotation box and click Assign.
7		If you choose to just reassign all employees then just select the new

		rotation and click assign on the main page.

Assigning Rotations to Employees by Supervisor

This procedure allows you to assign a selected rotation to all employees whose timesheet is approved by a selected supervisor.

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Click the EMP ROTATIONS tab.
4		Select SUPERVISOR from the drop-down list.
5		Enter the name of the supervisor whose employees you want to assign a rotation and click search.
6		From the list, click the name of the supervisor whose employees you want to assign a rotation.
7		**Assign to Rotation:** From the drop-down list, select the rotation to which you want to assign all the listed employees.
8		Click ASSIGN.

Assigning Rotations to Employees Individually

On occasion, you will need to change an individual employee's rotation.

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Click the EMP ROTATIONS tab.
4		**Employee name**: Enter the last name of the employee to whom you want to assign a rotation.
5		On the list of employees whose last names match the name you entered, locate the employee to whom you want to assign a rotation. Click the employee's name.
6		**Assign to Rotation:** From the drop-down list, select the rotation to which you want the employee assigned.
7		Click ASSIGN.

Creating Alternate Rotations Individually

To create an alternate rotation for a given pay period for a selected employee, using the employee name to locate the employee. This option is disabled if your organization is using Schedule.

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Click the EMP ROTATIONS tab.
4		Employee Name: enter the employee name you want to make the pay period exception rotation for and click Search.
5		Click on the Employee Name on the search results screen.
6		Click on the Employee Rotation link.
7		Click on the Create Exception radio button.
8		**Fiscal Year:** From the drop-down list, select the fiscal year in which the alternate schedule will be in effect.
9		**Pay Period:** From the drop-down list, select the pay period in which the alternate schedule will be in effect.
10		**Week 1 Shifts:** For each day in the first week of the pay period, select the appropriate rotation from the dropdown list.
11		**Week 2 Shifts:** For each day in the second week of the pay period, select the appropriate rotation from the drop-down list.
12		Click Create New Schedule. An alert box will display, asking you to confirm that you want to create an alternate schedule for the selected employee for the indicated pay period.
13		Click OK to confirm.

Working with Rotation Group

The Rotation Group tab is used to create the options that you see in the Grouping dropdown on the Rotation page. To create a Grouping perform the following steps.

Step #	Active Window	Action
	Home Page	
	Scheduling	
	Rotation Group	Click the Add tab.
		Enter a Group Code.
		Enter a Description
		Click Add

Working with Schedules

An additional function of the Scheduling Module is the creation of Schedules. This administrative tool enables creation and management of employee schedules.

Schedules may be submitted for approval before posting. This step will be controlled by your organization's work flow and policies. Schedule's functionality allows creation of routine schedules by Agency/Division/Bureau/Section (Agency/Troop/Zone/Station), but also allows supervisors to:

• Make specific changes to schedules to ensure adequate coverage is available for individual sections and shifts.

• Manage employee leave and additional time.

Creating a New Schedule

A Schedule is created for an individual section/station. All employees assigned to the section/station will appear on the schedule. Schedules may be accessed by other schedule users (view only), and by the supervisor and alternate supervisors for that section/station (view and edit).

A Payroll Period selector is also available to allow the scheduler to navigate to a specific payroll period. Schedules are created in a "worksheet" mode and status will be displays as "worksheet". Organizational work flow may require the creation, approval and posting of a schedule within a designated time frame. It may also require that schedules be submitted for approval prior to posting. Organizations must enforce their policies through the work flow process. LATS will not enforce any time frames and it will allow a schedule to go from Worksheet to Posted in one step. **LATS will not pre-fill timesheets until the schedule is Posted.**

The Schedule Worksheet will allow changes to an employee's schedule on an as-needed basis. Each day of an employee's 28-day schedule will show two rows. The top row is for a full shift of leave and the second row is for the shift the employee is assigned to for that day. Worksheets will be pre-filled from the employee's rotations, but will allow direct changes to the shift or entry of leave without a pop-up list. Leave codes are built from miscellaneous leave codes tied to system leave categories.

Shifts are built from the shifts defined on the shift tab. LATS will edit leave types and shifts. If an invalid leave type or shift is entered, a Select box appears an displays all of the available codes or shifts. Codes/shifts are selected by clicking them. Colored error codes display at the bottom of the worksheet. If you bypass the Select box, the invalid cell is highlighted, based on the color legend at the bottom of the worksheet. You may also right-click the cell to display the list of valid codes and shifts.

The schedule also provides a summary of shift coverage indicating number of available employees for each shift and a Schedule Day View that features a graphical view of coverage for all hours scheduled.

To create a New Schedule Worksheet:

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Click on the Schedule tab.
4		Click on the Add tab.
5		Use the <prev and next > arrows to get to the correct pay period.
6		**Agency:** Select the required agency from the drop-down list.
7		**Division:** Select the required division from the dropdown list.
8		**Bureau:** Select the required bureau from the drop-down list.
9		**Section:** Select the required section from the drop-down list.
10		If desired, click PREVIEW to view the schedule before saving. *Note: Changes cannot be made to a schedule before it is saved. This is a view only screen.* Click CLOSE when finished previewing.
11		If the schedule is accurate, click SAVE SCHEDULE. The schedule will be given the status of “Worksheet”. The schedule screen indicates schedule status, User and number of days until schedule is in current status.
12		*Note: Timesheets that are pre-filled from the schedule will not populate until the schedule status is "posted".*

LATS allows agencies to set up workflow properties that will limit a schedule user to creating and editing schedules for the Rotation they are assigned to.

Example

Schedule User 1 is assigned to Division A, Bureau B, Section C. Schedule User 1 will be limited to creating schedules for employees that are also assigned to Division A, Bureau B, Section C but will have view access to other schedules.

Submitting a Schedule for Required Approval

Based on your organization's work flow you may be required to submit a schedule for approval before it is posted. No edit rules are enforced by LATS on how schedules are approved or who is authorized to approve a schedule for your organization.

To submit a schedule for approval:

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Click on the Schedule tab.
4		Locate the existing worksheet for the timesheet period.
5		From the drop-down lists, choose Agency/Division/Bureau/Section and click REFRESH.
6		A list of schedule periods for that group will display.
7		Determine which **Schedule Period** you want to submit for approval.
8		Click EDIT on the line for the schedule you want to submit.
9		From the drop-down list, select SUBMITTED.
10		Click UPDATE STATUS. The schedule will remain in “Pending Approval” status until it is approved and “Posted”.

Note: A worksheet may also be submitted when shift and leave edits are completed by clicking SUBMIT WORKSHEET *on the bottom of the open worksheet. Status will be updated to* Submitted.

Posting a Schedule After Review is Complete and Approved

Organizational policies or Negotiating Unit contracts may dictate the time line for Posting a Schedule. A schedule may be posted immediately if none of these apply.

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Click on Edit on schedule line and choose Post. When Schedule is posted, timesheet will pre-fill employee timesheets if Rotation “Time Sheet Data” indicates “prefill from schedule”.
4		Change the Status dropdown to Posted.
5		Click Update Schedule.
6		Click Ok.

Reviewing Existing Schedule Periods

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Click on the Scheduling tab.
4		Locate the existing schedule for the timesheet period: From the drop-down lists, choose Agency/ Division/ Bureau/ Section, and click REFRESH.
5	Schedule Periods	Click on the dates for the schedule period you want to review.
6	Schedule	To review coverage for an individual day, click on that date at the top of the schedule.
7	Schedule Day View	You can review all available coverage for date selected.

Making Shift Changes, Adding Additional Time or Leave, or Creating Special Assignments for an Existing Schedule Period

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Click on the Scheduling tab.
4		Locate schedule.
5		Click on schedule period that requires adjustment.
6		Click on the shift for the employee
7		Make any needed changes or corrections to the day, date, and current schedule. The changes will take effect on the day displays.

Changing a Shift for an Individual Employee in an Existing Schedule

Example

Employee's normal schedule is 8:00AM to 4:00PM. Additional coverage is required for 4:00PM to 12:00 PM shift due to a special event.

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Click on the Scheduling tab.
4		Locate schedule
5		Click on schedule period that requires adjustment.
6	Schedule	Click on the shift for the employee
7		Make any needed changes or corrections to the day, date, and current schedule. The changes will take effect on the day displays.
8		From drop-down list, choose the new Shift Assignment.
9		LATS defaults to CHANGE SCHEDULE THIS DATE, but if multiple days are required, click CHANGE SCHEDULE BY RANGE and, from the drop-down list, select the end date. Only days that fall within the schedule period will be displayed for selection.
10		LATS defaults to RESPECT PASSDAYS. Employee's current Pass days will not be changed for the new Shift Assignment.
11		Click off the check mark in box if change is required to current Pass days during the new Shift Assignment.
12		Click UPDATE SCHEDULE.

Note: Shift changes may also be completed using the Search/Reassign function under Scheduling.

Adding Additional Time for an employee

Example

An accident occurs or machinery breaks down and the employee must work past normal shift end.

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Click on the Scheduling tab.
4		Locate schedule

5		Click on schedule period that requires adjustment.
6		Click on the shift for the employee
7		Click the ADDITIONAL TIME tab.
8		From the drop-down list, choose the Reason for additional time. Click in the Recall box if payment type falls in a Recall category. This is an informational setting only. This field has no effect on the scheduling or editing process but may be included in information for ad hoc reporting. Enter "Start" time Enter "End time" or click the radio button before Amount (Hrs.) and enter the number of hours approved. Enter information in Narrative if appropriate.
9		Click SAVE and CLOSE.

Adding Leave for an employee

Example

An employee requests a vacation day using available accruals.

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Locate schedule. Click on schedule period that requires adjustment.
4		Click on the shift for the employee
5		Click the LEAVE tab.
6		From the drop-down list, select the appropriate miscellaneous leave code.
7		LATS defaults to ADD LEAVE THIS DATE. If multiple days are required, click the radio button before **add leave by range** and, from the drop-down list, choose the end date. Only days that fall within the schedule period will be displayed.
8		LATS defaults to employee's scheduled Start and End times. Click in the field and change times as required or enter

		start time and click the radio button in front of **Amount (hrs.)** and enter number of hours requested.
9		Click SAVE and CLOSE.

Multiple entries may be completed for the same day and leave code. Multiple entries to a single miscellaneous leave code will be displayed in total for each day on the timesheet. If the employee does not have sufficient leave credits for this entry, an edit error will be flagged.

The 28-day time period schedule will now display colored background bars to indicate leave and additional time instances for employees.

Note: Additional Time and Leave may also be added using the Leave/Addtl function in Scheduling. Additional Time and Leave instances added on the Schedule will transfer to the timesheet. Extra ins and outs will be populated, miscellaneous leave lines will be created on the timesheet and number of leave hours will fill in on the day and miscellaneous leave line.

Employees may view their schedule from their timesheets but details are not displayed. It is a read-only function.

Designating a Special Shift Assignment for an employee

Example

An employee is assigned for a two week period to represent the agency at a State Fair. Employee will be assigned to a different shift for the length of this assignment.

Step #	Active Window	Action
1	Home Page	
2	Scheduling	
3	Administration	Locate schedule. Click on schedule period that requires adjustment.
4	Schedule	Click on the shift for the employee
5	Change Shift	Click the SPECIAL ASSIGNMENT tab.
6	Schedule Details	Click the drop-down list to find all special assignments previously assigned to the employee.
7	Schedule Details	To add a new special assignment, click ADD NEW at the bottom of the screen.
8	Schedule Details	Enter the information in the **Description** field.
9	Schedule Details	**Start date** defaults to date currently selected on schedule. If required, change **Start date** by manually entering the date or choosing the date from the calendar.
10		Manually enter or choose **End date** from the calendar.

11		Select shift assignment from the drop-down list.
12		If required, choose TDS category and/or TDS Task.
13		Click SAVE AND CLOSE. SA appears on schedule under appropriate employee/day(s).

Deleting a Special Assignment

Step #	**Active Window**	**Action**
1	Home Page	
2	Scheduling	
3	Administration	Locate schedule.
4		Click on schedule period that requires adjustment.
5	Schedule	Click on the shift for the employee
6	Change Shift	Click the SPECIAL ASSIGNMENT tab.
7	Special Assignment	Click DELETE at the bottom of the page.
8		Click SAVE AND CLOSE.

Note: Only changes to scheduled ***hours*** *may be completed through the Special Assignment tab. Changes to* ***Agency/Division/Bureau/Section*** *are completed using the* SCHEDULING > SEARCH*/Reassign function.*

Reassigning an Employee to a Different Agency/ Division/ Bureau/ Section on a Temporary or Permanent Basis

Example

Employee is transferred or promoted to a different unit under a new Supervisor.

Step #	**Active Window**	**Action**
1	Home Page	
2	Scheduling	
3	Administration	Locate schedule.
4		Click on schedule period that requires adjustment.
5		Click on the shift for the employee
6		Click SEARCH/REASSIGN. Under search function, enter the name of the employee to be reassigned. Click SEARCH. Choose employee from list by clicking on the name.
7		LATS defaults to the current date. Click the calendar to select a different start date. If the assignment is temporary, click the calendar to choose **Assignment End Date**. If assignment

		is permanent or open-ended, leave the **Assignment End Date** field blank.
8		From the drop-down list, select the new Agency/Division/Bureau/Section. Click REASSIGN. The confirmation message "Are you sure you want to reassign this employee?" will display.
9		Click OK to complete the re-assignment.

Note: Agency/Division/Bureau/Section in Admin/Appointments is automatically updated with the new assignment information.

Deleting an Unused Schedule

LATS will not let you delete a schedule period if any authorized leave is associated with that schedule period. All leave for a schedule period must be deleted before the period can be deleted.

Step #	**Active Window**	**Action**
1	Home Page	
2	Scheduling	
3	Administration	Locate schedule.
4		Click on schedule period that you want to delete.
5		Click DELETE. An "Are you sure you want to delete this schedule?" confirmation will display.
6		Click OK.

Chapter 11: Standard Security Roles and Settings

The following Security Roles are supplied with the initial installation of LATS:

Security Role	Access
User	Access to their timesheet only, with create and submit rights.
Time Records	Full (Read/Change) access to all employees balances, attributes and timesheets. Access to the Rules tables. Access to the accruals process and payment interface. Ability to enter new employees directly into LATS. Ability to assign timekeepers, supervisors and delegates.
Personnel	Read only access to all employee timesheets.
Maintenance	Access (create/change) to the rules and code table maintenance pages.
Security	Access to the security page in LATS - ability to assign user id's, reset passwords and assign security roles.
Supervisor	Read Access to the direct reports and alternate reports timesheets for review and approval.
Schedule Administrator	Access (create/change) to the scheduling administrative functions (Shifts/Rotations/Employee Rotations)
Schedule Planner Administrator	Access (create/change) to the scheduling planner module for the appropriate division or bureau the employee belongs to. Access to Search/Reassign, Supervisor Schedules. and Leave/Addtl Time. *NOTE: the combination of Planner and Time Records allows the user to administer (create/delete/modify) schedule planners agency wide.*
Cost Query	Access to the Cost Query pages contained in the Cost Process Module. Ability to create and change queries to the cost data.
Finance	Access to all functions of the Cost Process Module. Ability to create and run a cost process and publish the results.
TDS Unlock	If configured, gives the user the ability to unlock an employee’s TDS entries after a timesheet has been processed, then reset. This requires an extra step to monitor TDS changes after timesheets have been processed.
TDS Master	Access (create/change) to the TDS category/task/subtask maintenance tables. Ability to create and maintain for agency wide.

TDS Coordinator	Access (create/change) to the TDS category/task/subtask maintenance tables. Ability to create and maintain for specific division(s).
Delegate	Allows an employee to review assigned employee timesheets on behalf of their supervisor. Does not allow the timesheets to be marked approved, just reviewed.
Timekeeper	

Security Roles Menu and Non Menu Pages

Security Role	Menu/Non Menu Pages
User	Home, Timesheet, My Timesheet, Admin, Change Password, Subtasks, Schedule Search, Audit (Timesheet), Employee Notification, HRA Timesheet Report, Misc. Leave Balance, Misc. Leave Tab, OT Payment Print, Overtime Payments, Overtime Payments Audit, Print.aspx, Project Search Results, Schedule Day View, Schedule Detail, Schedule Roster, Schedule Roster Days, Schedule Roster Print, Schedule Tour Strength, Soft_Clock.aspx, Supervisor View/Select, Timesheet Notes, Timesheet Page, Timesheet Payments, Timesheet Summary, Timesheet TDS, Timesheet TDS – Custom V1, Timesheet TDS – Custom V2, View Schedule and Timesheet Differences.
Time Records	Timesheet, My Timesheet, Timekeeper, Punch Detail, Admin, Users, Roles, Supervisor Assign, Accruals Process, Misc. L Mass Assign, Delegates, Manage Seasonal Hours, Payment Interface, Code Maintenance, Misc. L Codes, Categories, Misc. Payment Codes, Payment Codes, Earning Codes, Payment Rosters, Cost Splits, Edit, Report, PaySR File generation, Direct Reports to a Supervisor, Payment Roster Details Print, Payment Roster Details (Employee), Payment Roster Details (Item), Payment Roster Details (Title), Process Accruals Exceptions, Segmentation Admin, Timesheet Profile.
Personnel	Timesheet, Timesheet Search.
Maintenance	Table Maintenance, Location, Negotiating Units, Titles, Cost Centers, Object Codes, Work Locations, Tips, Announcements, TimeClock Card, Configurable Settings, Organization Structure, Code Maintenance, Adjustment

	Codes, Misc. Leave Codes, Categories, Charge Codes, Misc. Payment Codes, Payment Codes, Earning Codes, Payment Rosters, Email Messages,.
Security	Admin, Users, Roles, Page Security, Security Roles, Table Maintenance, Password Rules.
Supervisor	Timesheet, Approval List, Verification List, Audit, HRA Timesheet Report.
Schedule Administrator	Scheduling, Administration, Search/Reassign, Schedule View Employee.
Schedule Planner Administrator	Scheduling, Administration, Leave/Additional Time, Schedule Day View, Schedule Roster, Schedule Roster Days, Schedule Roster Print, Schedule Temporary Assignment, Schedule Tour Strength, Schedule View Employee, Schedule Worksheet Print, Schedule Worksheet Roster, Schedule Worksheet Roster Days. ***Restricted by users Troop, Zone, Station.*
Schedule Planner Admin - Unrestricted	Scheduling, Administration, Leave/Additional Time, Schedule Day View, Schedule Roster, Schedule Roster Days, Schedule Roster Print, Schedule Temporary Assignment, Schedule Tour Strength, Schedule View Employee, Schedule Worksheet Print, Schedule Worksheet Roster, Schedule Worksheet Roster Days. ***NOT restricted by users Troop, Zone, Station.*
Cost Query	Cost Splits, Edit, Assign Users, Report, PaySR File Generation, Cost Processing, Cost Process Exceptions, Cost Process Review, Cost Query, FMS Extract Logs.
Finance	Cost Process Exceptions, Cost Process Review, FMS Extract Logs, Leave Factor Report, Missing/Late Timesheet Report.
TDS Unlock	Admin, TDS Unlock.
TDS Master	TDS Maintenance, TDS Tasks, Subtasks, Custom TDS Access, TDS Coordinator Access, TDS Task History.
TDS Coordinator	TDS Maintenance, TDS Categories, TDS Tasks, Subtasks, Custom TDS Access, TDS Coordinator Access, TDS Task History.
Timekeeper	Timesheet, Timekeeper.
Delegate	Timesheet, Assignee List.

Customers may create their own security roles to allow access to certain menu and non-menu items in LATS.

Chapter 12: Creating and Modifying Roles

The Roles application allows the end user to create new roles above and beyond those that are supplied with the application. In this application the end user can create new roles or modify non system supplied roles.

To create a new role:

Step #	Active Window	Action
1	Home Page	
2	Admin	
3	Roles	Click on the ADD tab.
4		Enter Role Name:
5		Enter Role Description:
6		Access Level: The lower the security access the more “authority” it has. For example, if you have 2 roles and they have overlapping page access the lower level security role will “trump” the higher level security role.
7		Active: If set to Yes the role will be accessible for use. If set to No the roles will not be accessible for use.
8		

Chapter 13: Page Security

LATS has the ability to allow people with the appropriate security access to modify individual and role level access to page and non-menu pages. This feature supports the end user's ability to create unique roles that are different from the supplied roles. The end user can search by Role or by Person and then make modifications on a role level or an individual level.

Page Security by Role

Step #	Active Window	Action
1	Home Page	
2	Admin	
3	Page Security	Click on the Search Role tab.
4		Enter the role description or leave the field blank and click the Search button to return all roles.
5		Click on the Role Name.
6		Make the appropriate changes to the role page access.
7		Click Save.

Note: End users will not be allowed to modify page security for the supplied roles. They will only be allowed to modify page security for the roles that they create internally.

Page Security by Employee

Employees with the appropriate security privileges will be allowed to modify page security by individual if necessary**. Changes on the Page Security application will override the roles checked in the employee General page in their employee record.**

Step #	Active Window	Action
1	Home Page	
2	Admin	
3	Page Security	Click on the Search People tab.
4		Enter the employee name and click the Search button to return all roles.
5		Click on the Employee Name.
6		Make the appropriate changes to the role page access.
7		Click Save.

Chapter 14: Additional LATS Admin Functions

Topics Discussed In This Chapter:

- Change Password
- Supervisor Assignment
- Misc. Leave Mass Assign
- Timekeeper Assignment and Procedures
- Working with Delegates
- Manage Swaps – SISU Interface
- Leave Donation
- Manage Office Locations

Change Password

LATS offer the ability for employee to change their password.

Step #	Active Window	Action
1	Home Page	
2	Admin	
3	Change Password	Enter the current password.
4		Enter new password.
5		Confirm new password.
6		Click Submit.

Note: Password characteristic requirements will be displayed on the screen. If the end user creates a password that does not meet the requirements, the password will not be changed and the system will notify the employee that the password was not changed.

Security Roles Assignment

The Security Roles Assignment application under the Admin menu is another way to access and modify security

Supervisor Assignment

LATS offers multiple ways to manage Supervisor Assignments in LATS. In the Supervisor Assignments page, end users can manage supervisors by Employee, Supervisor or Section.

Choosing to manage supervisor by Employee allows the end user to assign a new supervisor to an employee or manage the Alternate Supervisors attached to a supervisor.

Step #	Active Window	Action
1	Home Page	
2	Admin	
3	Supervisor Assignments	In the Search By field select Employee.

4		Enter the Employee name and click the Search button.
5		To **change the employee's supervisor** click on the employee name.
6		Select the appropriate supervisor from the drop down box.
7		Click Save.
8		To **change the alternates for the supervisor** attached to that employee **click on the supervisor name**.
9		Click on the Edit Supervisor button.
10		Select the appropriate alternate supervisor(s) from the drop down list.
11		Click Save.
12		End user will receive a message to confirm that All Employee's with that supervisor will be updated with those alternates.
13		Click Ok to confirm.

Assigning an Employee as a Supervisor via Supervisor Assignment Page

You can make an employee a Supervisor by checking the Supervisor Role check box. The steps below outline how to access the employee record.

Step #	Active Window	Action
1	Home Page	
2	Admin	
3	Supervisor Assignments	In the Search By field select Employee.
4		Enter the Employee name and click the Search button.
5		Click on the employee's name.
6		Check the Supervisor Role box.
7		Click Save.

Choosing to manage supervisors by the Supervisor drop down allows the end user to assign a new supervisor to an employee or manage the Alternate Supervisors attached to a supervisor.

Step #	Active Window	Action
1	Home Page	
2	Admin	
3	Supervisor Assignments	In the Search By field select Supervisor.
4		Enter the Supervisor name and click the Search button.
5		To **change the employee's supervisor** click on the employee name.
6		Select the appropriate supervisor from the drop down box.
7		Click Save.
8		To **change the alternates for the supervisor** attached to that employee **click on the supervisor name**.
9		Click on the Edit Supervisor button.
10		Select the appropriate alternate supervisor(s) from the drop down list.
11		Click Save.
12		End user will receive a message to confirm that All Employee's with that supervisor will be updated with those alternates.
13		Click Ok to confirm.

Assigning and Modifying Supervisor Assignments by Section

Step #	Active Window	Action
1	Home Page	
2	Admin	
3	Supervisor Assignments	In the Search By field select Section.
4		Select the appropriate Agency from the drop down list.
5		Select the appropriate Division from the drop down list.
6		Select the appropriate Bureau from the drop down list.

7		Select the appropriate Section from the drop down list.
8		Click the Search button.
9		To **change the employee's supervisor** click on the employee name.
10		Select the appropriate supervisor from the drop down box.
11		Click Save.
12		To **change the alternates for the supervisor** attached to that employee **click on the supervisor name**.
13		Click on the Edit Supervisor button.
14		Select the appropriate alternate supervisor(s) from the drop down list.
15		Click Save.
16		End user will receive a message to confirm that All Employee's with that supervisor will be updated with those alternates.
17		Click OK to confirm.

Misc. Leave Mass Assign

This function gives administrators the ability to create a miscellaneous leave balance set up by employee, negotiating unit, title or for all employees. Miscellaneous leave balances will be displayed on the front of the timesheet and a running balance will be kept and displayed.

Note: Miscellaneous leave balances completed under Mass Assign will affect current active employees. New employees will not automatically receive a balance previously assigned to other employees. Administrators will have to complete a Mass Assign to the individual employee as needed.

Step #	Active Window	Action
1	LATS Admin	
2	Misc. L Mass Assign	**Assign by:** Choose EMPLOYEE, ALL EMPLOYEES, TITLE, or NEGOTIATING UNIT from the drop-down list. The screen will display the Misc. Leave Mass

		Assignments page.
3		**Leave Category:** Choose the category from the dropdown list.
4		**Adjustment Amount:** Enter the number of hours for this adjustment.
5		**Adjustment type:** Click the radio button to choose either INITIAL BALANCE or ADJUSTMENT. If this is the first time this category has been assigned, choose INITIAL BALANCE. Any additional adjustments to the category should be completed under ADJUSTMENTS. If you wish to reset the balance to a specified value and pay period, choose INITIAL BALANCE.
6		**Pay Cycle:** Choose either ADMINISTRATION or INSTITUTION from the drop-down list.
7		**Pay Period Year:** Choose the year from the drop-down list.
8		**Pay Period:** Choose the pay period in which you wish to add the balance form the drop-down list.
9		Click SUBMIT.
10		The Status screen will display and indicate if the process was successful. Click the Status message to display the details of the process.

Timekeeper Assignment and Procedures

On occasion, it will be necessary to assign a specific individual to complete a timesheet for another employee. This employee is designated as a timekeeper. Timekeepers will perform the same function as the employee and actually act on the employee's behalf.
They may enter charges to accruals, as directed by the employee, and they may complete a timesheet with appropriate miscellaneous leave charges. They will also submit the timesheet for

the employee. A timekeeper must be designated by a LATS administrator following the procedures in this section and the employee must be assigned to the timekeeper.

Example 1

An employee is out sick for an extended period of time and cannot enter charges or submit a timesheet to the supervisor for approval.

Example 2

Employees work at remote locations with limited computer access. A timekeeper may be designated to enter timesheets for these employees.

When an employee is designated as a timekeeper, the timesheet will display a Timekeeper tab. Clicking that tab will display a screen very similar to the Home Page. Also displayed will be EDIT TIMESHEETS and a calendar to allow the timekeeper to choose the correct day/timesheet for entry. Individual timesheets will not display the PREV/NEXT and GO fields, so a timekeeper will only be able to navigate between timesheets with the Calendar. The name(s) of the employee(s) assigned to the timekeeper will also be displayed followed by Day In/Lunch Out/Lunch In/Day Out fields. The timekeeper may fill in these fields directly on this screen on a daily basis, or may click on the name of the employee and open the timesheet for completion. Entries will be completed using the same steps as the timekeeper follows to complete his/her own timesheet. This section of the manual covers authorizing a timekeeper, removing a timekeeper's authorization, creating and maintaining employee-timekeeper associations.

Creating a Timekeeper and Deleting a Timekeeper

When a timekeeper is authorized to complete timesheets for a specific employee or employees and a change in circumstances makes that timekeeper/employee association unnecessary, the timekeeper authorization should be deleted.

Note: A timekeeper cannot be deleted if any employees are assigned to the timekeeper, but an individual employee may be removed from a timekeeper.

Viewing Timekeeper Associations

Step #	Active Window	Action
1	Home Page	
2	Admin	
3	Timekeeper Assign	To view a list of All Timekeepers leave the Search By drop down set to All Timekeepers.
4		Click the Search button.
5		To see all the assignees for a Timekeeper click on the Timekeeper name.

Deleting Employee - Timekeeper Associations

Step #	Active Window	Action
1	Home Page	
2	Admin	
3	Timekeeper Assign	To view a list of All Timekeepers leave the Search By drop down set to All Timekeepers.
4		Click the Search button.
5		To see all the assignees for a Timekeeper click on the Timekeeper name.
6		To remove an employee from a Timekeeper click on the Remove link to the right of the employee title on the employee row.
7		The end user will be prompted to confirm the removal of the assignee from the Timekeeper.
8		Click Ok to confirm and remove.

Adding an Employee to a Timekeeper

Step #	Active Window	Action
1	Home Page	
2	Admin	
3	Timekeeper Assign	Change the drop down option to Employee and enter the name of the Timekeeper that you wish to add employee’s to.
4		Click the Search button.
5		Click on the Timekeeper name in the returned rows
6		On the next screen enter the name of the employee that you want to add to the Timekeeper.
7		Click Search.
8		Once you have identified the correct employee click the Assign link on the employee record row on the left hand side of the screen.
9		Notice that after the Assign button is clicked the status changes to Assigned and the employee is displayed in the Assigned Employee’s list.

Reassigning all Employees from one Timekeeper to another Timekeeper

There may be a circumstance that will require all employees assigned to one Timekeeper to be reassigned to another Timekeeper. This can be done by a mass reassignment of employees from one Timekeeper to another Timekeeper in the Timekeeper Assign application.

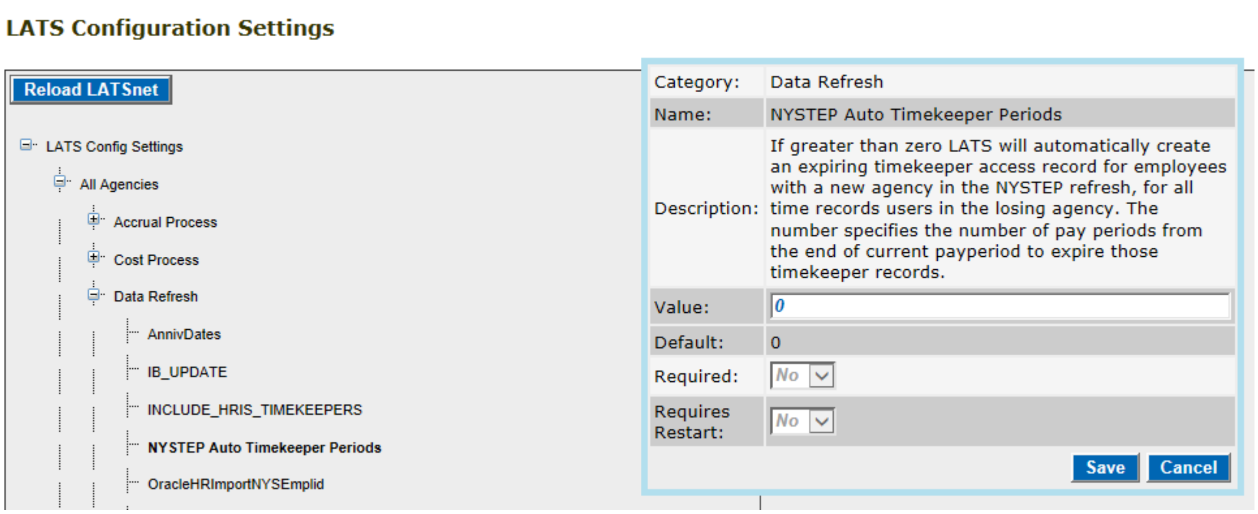
Step #	Active Window	Action

1	Home Page	
2	Admin	
3	Timekeeper Assign	Locate the Timekeeper that you wish to reassign employees FROM and click on the row.
4		Select the new Timekeeper from the Timekeeper drop down list on the right hand panel.
5		Click the Reassign All button.

Timekeeper Automated Facility Change Configuration Setting

LATS now allows an employee to be automatically assigned to a Timekeeper when they change facilities (‘Agencies’ in LATS). This automatic assignment is triggered by the detection of agency code changes in the weekly NYSTEP refresh.

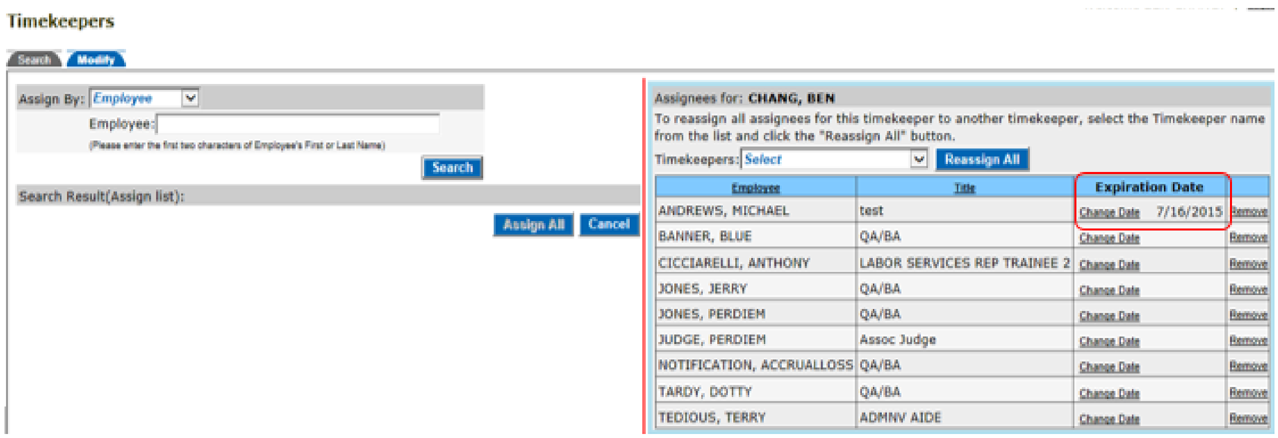
In order to allow access to timesheets for employees who move to a new facility, the Time Records user at the losing facility will be given temporary access to transitioning employees by being assigned as a LATS Timekeeper for a limited period of time. The amount of time that losing facilities will have to access transitioning employees is configurable by accessing the configuration setting “NYSTEP Auto Timekeeper Periods”, located under the Data Refresh section of the LATS Configuration Settings.



When a change of facility (agency code) is detected for an employee in the NYSTEP interface, the following will occur:

- ‘Time Records’ users from the losing facility will be assigned as Timekeepers for the employee with an expiration date based on the above configuration setting.
- The Timekeeper assignment will not function after the expiration date.

If the Time Records user at the losing facility needs more time (than the number of pay periods listed in the “NYSTEP Auto Timekeeper Periods” configuration setting) to access an employee’s data in LATS, then you can extend the length of time manually. This is accomplished by going to Admin > Timekeeper Assign.



Working with Delegates

Delegates are individuals authorized to review timesheets, either from a supervisor's direct reports or for individually specified employees. Delegates may not approve or un submit employee timesheets. Their access is limited to viewing the timesheets, so that they can advise the supervisor of any possible problems or errors.

Note: A delegate can review a timesheet by opening their own timesheet and clicking on the assignee list tab. A list of timesheets that are pending review will be displayed. The timesheet may be opened by clicking on the employee's name. A delegate may indicate that the timesheet is satisfactory by clicking REVIEW *on the submitted timesheet. A message will be displayed to ensure the timesheet should be marked as reviewed. Click* OK. *This action will mark the timesheet as reviewed (under Status on the timesheet) and the supervisor may then proceed with approval.*

Viewing Delegates and Assignees

Step #	Active Window	Action
	Home Page	
	Admin	
	Delegates	To view a list of All Delegates leave the Search By drop down set to All Delegates.
		Click the Search button.
		To see all the assignees for a Delegate click on the Delegate name.

Deleting Employee - Delegate Associations

Step #	Active Window	Action
1	Home Page	
2	Admin	

3	Delegates	To view a list of All Delegates leave the Search By drop down set to All Delegates.
4		Click the Search button.
5		To see all the assignees for a Delegate click on the Delegate name.
6		To remove an employee from a Delegate click on the Remove link to the right of the employee title on the employee row.
7		The end user will be prompted to confirm the removal of the assignee from the Delegate.
8		Click Ok to confirm and remove.

Adding an Employee to a Delegate

Step #	Active Window	Action
1	Home Page	
2	Admin	
3	Delegates	Change the drop down option to Employee and enter the name of the Delegate that you wish to add employee's to.
4		Click the Search button.
5		Click on the Delegate name in the returned rows
6		On the next screen enter the name of the employee that you want to add to the Delegate.
7		Click Search.
8		Once you have identified the correct employee click the Assign link on the employee record row on the left hand side of the screen.
9		Notice that after the Assign button is clicked the status changes to Assigned and the employee is displayed in the Assigned Employee's list.

Reassigning all Employees from one Delegate to another Delegate

There may be a circumstance that will require all employees assigned to one Delegate to be reassigned to another Delegate. This can be done by a mass reassignment of employees from one Delegate to another Delegate r in the Delegate application under the Admin menu option

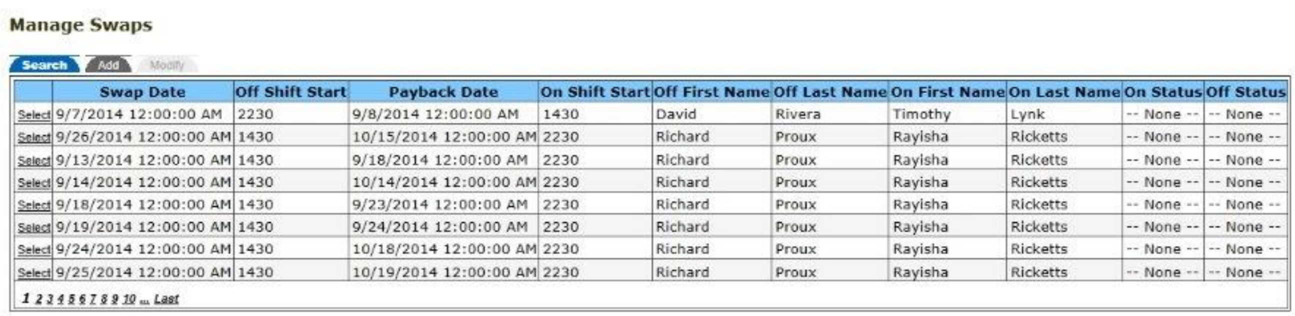
Step #	Active Window	Action
1	Home Page	

2	Admin	
3	Delegates	Locate the Delegate that you wish to reassign employees FROM and click on the row.
4		Select the new Delegate from the Delegate drop down list on the right hand panel.
5		Click the Reassign All button.

Manage Swaps – SISU Interface

This file contains swap information between two or more i.e. Corrections Officers. Swaps are fed into LATS from SISU via the swap file. The swap user interface, illustrated below, tracks swaps that are imported from the SISU file and allows direct entry of swaps for non-SISU employees. The user interface also accommodates edits to swap records. These changes do NOT feed back into the SISU system.

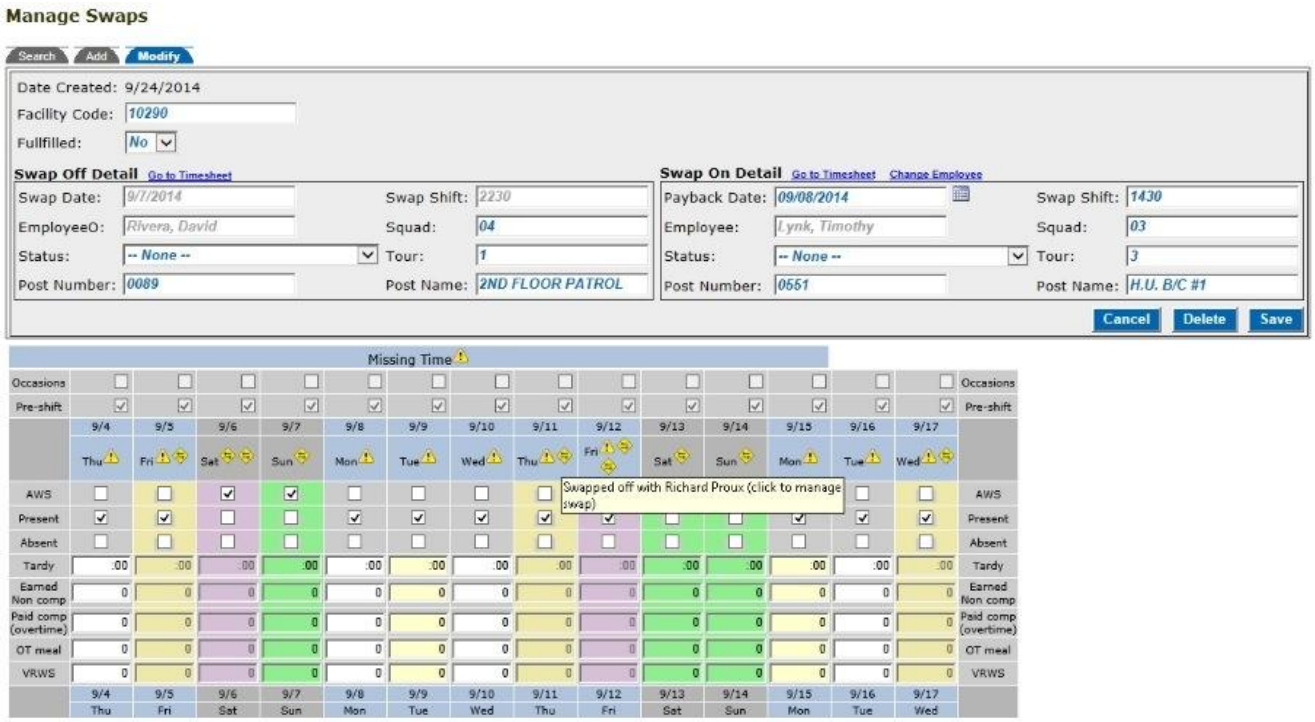
When a CO is working a swap, the background color for the “swap on” day is green. When the CO is off on a swap, the background color for the “swap off” day is gold. A ‘swap on” and “swap off” on the same day the background color is purple. In addition to the color changes, a small diamond shaped icon containing two arrows will be displayed next to the day of the week on each swap day. Hovering the mouse over the icon will display a tool tip with information about the swap. Clicking on the icon will navigate to the associated swap detail record.


Manage Swaps

Search Add Modify

	Swap Date	Off Shift Start	Payback Date	On Shift Start	Off First Name	Off Last Name	On First Name	On Last Name	On Status	Off Status
Select	9/7/2014 12:00:00 AM	2230	9/8/2014 12:00:00 AM	1430	David	Rivera	Timothy	Lynk	-- None --	-- None --
Select	9/26/2014 12:00:00 AM	1430	10/15/2014 12:00:00 AM	2230	Richard	Proux	Rayisha	Ricketts	-- None --	-- None --
Select	9/13/2014 12:00:00 AM	1430	9/18/2014 12:00:00 AM	2230	Richard	Proux	Rayisha	Ricketts	-- None --	-- None --
Select	9/14/2014 12:00:00 AM	1430	10/14/2014 12:00:00 AM	2230	Richard	Proux	Rayisha	Ricketts	-- None --	-- None --
Select	9/18/2014 12:00:00 AM	1430	9/23/2014 12:00:00 AM	2230	Richard	Proux	Rayisha	Ricketts	-- None --	-- None --
Select	9/19/2014 12:00:00 AM	1430	9/24/2014 12:00:00 AM	2230	Richard	Proux	Rayisha	Ricketts	-- None --	-- None --
Select	9/24/2014 12:00:00 AM	1430	10/18/2014 12:00:00 AM	2230	Richard	Proux	Rayisha	Ricketts	-- None --	-- None --
Select	9/25/2014 12:00:00 AM	1430	10/19/2014 12:00:00 AM	2230	Richard	Proux	Rayisha	Ricketts	-- None --	-- None --

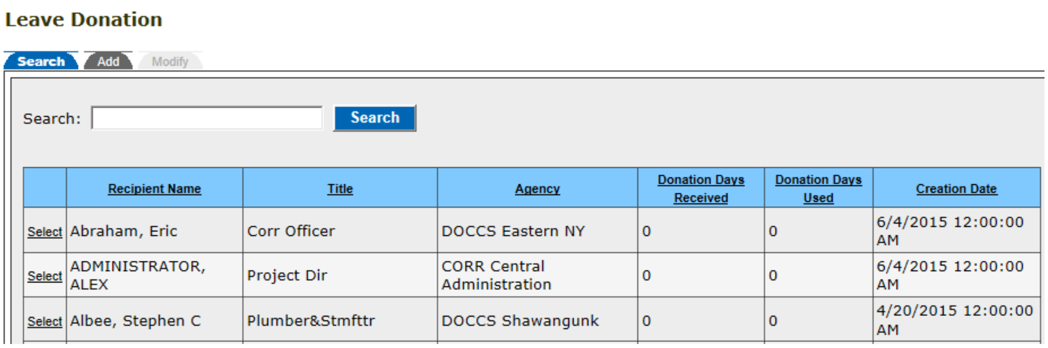
1 2 3 4 5 6 7 8 9 10 ... Last



Leave Donation

A new user interface has been created to manage leave donations and recipient information. LATS administrators can setup an employee as a recipient and then enter donated leave from any number of donors. The donated leave is automatically added to the recipient's accruals and debited form the donor's accruals at the time the donations is entered. In addition, LATS ensures that:

- Donors have a minimum of 10 days of vacation *after* making a donation.
- Donated leave will be used in the order it was donated.
- Unused donated leave is returned to donors.

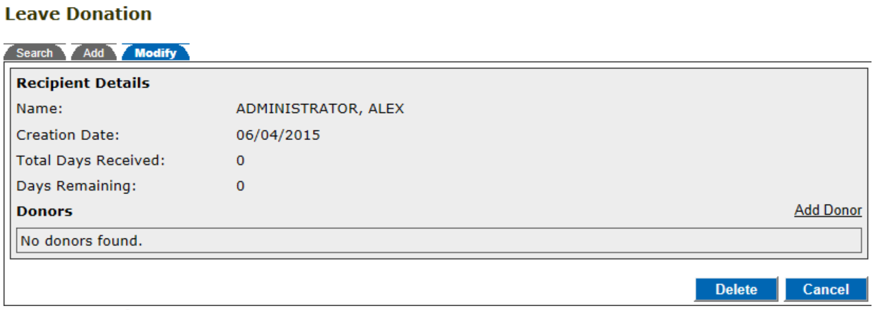


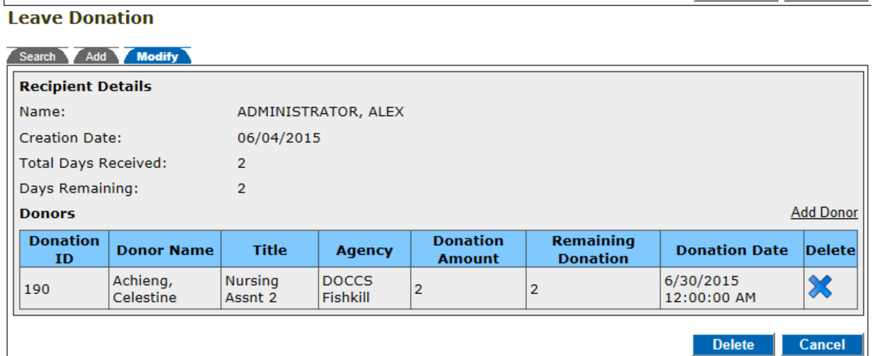
Leave Donation

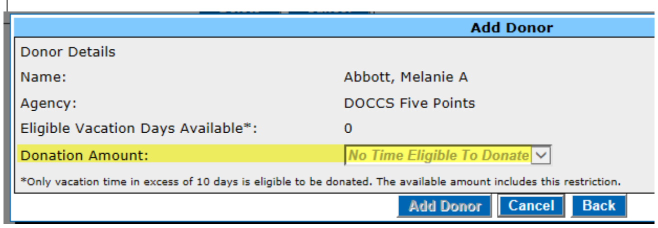
Search | Add | Modify

Search: [ ] Search

	Recipient Name	Title	Agency	Donation Days Received	Donation Days Used	Creation Date
Select	Abraham, Eric	Corr Officer	DOCCS Eastern NY	0	0	6/4/2015 12:00:00 AM
Select	ADMINISTRATOR, ALEX	Project Dir	CORR Central Administration	0	0	6/4/2015 12:00:00 AM
Select	Albee, Stephen C	Plumber&Stmfttr	DOCCS Shawangunk	0	0	4/20/2015 12:00:00 AM







Manage Office Locations

Office Locations allow LATS to store employee office address information. For initial data loads, an import function will be required to import the Office address information into LATS from an external file (excel spreadsheet). In addition, Agency code is included with the office information table. This will filter the office location s for selection based on the employee's current agency code. If enabled, the employees can select the office location from the contact link on their timesheet.

Importing Office Locations

ADMIN > MANAGE OFFICE LOCATIONS

Step #	Active Window	Actions
1	Home Page	
2	Admin	
3	Manage Office Locations	Click UPLOAD
4		Click BROWSE
		Navigate to the location of the CMA formatted spreadsheet

		Click UPLOAD

Viewing Office Locations

ADMIN > MANAGE OFFICE LOCATIONS

Step #	Active Window	Actions
1	Home Page	
2	Admin	
3	Manage Office Locations	Enter search criteria (Employee Name, Office Address, Office Building, City, State, and Agency), select the Search button. LATS will search all of the Office Location fields for a match on the entered criteria.
4		Search results are displayed. Click on the appropriate row to display Office Locations Details.

Creating Office Locations – Employee Assigned

ADMIN > MANAGE OFFICE LOCATIONS

Step #	Active Window	Actions
1	Home Page	
2	Admin	
3	Manage Office Locations	Click ADD tab.
4		Enter the following information.
5		Employee Name
6		Location if desired (i.e. Main)
7		Phone
8		Address 1
9		Address 2 (not required)
10		City
11		State
12		Zip Code
13		Building (not required)
14		Agency Source = Employee Agency
15		Click ADD

Creating Office Locations – Agency Assigned

ADMIN > MANAGE OFFICE LOCATIONS

Step #	Active Window	Actions
1	Home Page	
2	Admin	
3	Manage Office Locations	Click ADD tab.
4		Enter the following information.
5		Phone (not required)
6		Address 1
7		Address 2 (not required)
8		City
9		State
10		Zip Code
11		Building (not required)
12		Agency Source = User Specified
13		Select All or Specific Agency from the drop down
14		Click ADD

Assigning Office Locations

ADMIN > MANAGE OFFICE LOCATIONS

Step #	Active Window	Actions
1	Home Page	
2	Admin	
3	Manage Office Locations	Click ADD tab.
4		Enter the following information.
5		Employee Name
6		Location if desired (i.e. Main)
7		Phone
8		Select an Existing Location
9		Click OK to use location
10		Click ADD

Chapter 15: FMLA

Topics Discussed in This Chapter:

- How to Configure Settings for FMLA
- How to Authorize User Access to the FMLA Qualification Page
- Adding Misc. Leave Categories, Creating FMLA Codes and Using the 'FMLA Usage' Link
- How the FMLA Rules are Implemented in LATS
- How to Determine if Employees are Eligible to Use FMLA, and How to Add FMLA Cases
- FMLA Related Reports

How to Configure Settings for FMLA

Configurable Settings

You can change how FMLA functions in LATS by accessing the 'Configurable Settings'. This should only be changed by a LATS Administrator, since this is a system wide setting.

To access the relevant settings, go to Table Maintenance > Configurable Settings > Timesheet. There are four FMLA-related Configurable Settings:

- 'EnhancedFMLA': This setting enables the enhanced edits for using FMLA. If 'EnhancedFMLA' is set to 'YES', then administrators will be able to use the 'FMLA Qualification' page (Admin > FMLA Qualification) to create new FMLA cases. If 'EnhancedFMLA' is set to 'NO', then administrators will not be able to add new FMLA cases. They will only be able to use the 'FMLA Qualification' page to determine whether or not an employee is eligible to charge to FMLA.

- 'FMLAHoursWorked': The number of hours an employee must have worked in the past year to qualify to use FMLA. The default value is 1,250 hours. To change the number of hours, enter a new number in the 'Value' field and click the 'Save' button.

- 'MaxFMLACaseDays': The number of days an FMLA case is active (the maximum is 365 days). The default value is 30 days. To change the number of days, enter a new number in the 'Value' field and click the 'Save' button.

- 'MaxFMLACharged': The maximum number of days an employee can charge to FMLA in a calendar year. The default value is 60 days. To change the number of days, enter a new number in the 'Value' field and click the 'Save' button.

How to Authorize User Access to the FMLA Qualification Page

'Time Records' User Role: Administrators need to have the 'Time Records' User Role to be able to access the 'FMLA Qualification' page (Admin > FMLA Qualification).

By default, users can access the 'FMLA Qualification' page if they are authorized with the 'Time Records' User Role. However, custom roles can be set up to allow others to access the page. For more information on creating custom roles, see Chapter 12, titled "Creating and Modifying Roles".

Adding Misc. Leave Categories, Creating FMLA Codes and Using the 'FMLA Usage' Link

Adding Misc. Leave Categories

If you need to create a new Misc. Leave Category to support your agency's specific FMLA policies, you can create a 'Misc. Leave Category' by going to Code Maintenance > Misc. Leave Codes > Categories, and clicking on the 'Add' button. For further information on Misc. Leave Categories, see the instructions located in Chapter 2 in the section titled "Miscellaneous Leave Codes and Categories".

Creating FMLA Codes

To create (or see the settings for existing) FMLA Codes, go to Code Maintenance > Misc. Leave Codes > Charge Codes. For further information on Misc. Leave Codes and Categories, see the instructions in the section in Chapter 2 titled "Miscellaneous Leave Codes and Categories".

Using the 'FMLA Usage' Link

If you want employees to be able to see their FMLA usage when they click the 'FMLA Usage' link (located at the bottom of their timesheets), then the Misc. Leave Charge Codes MUST have the 'Enhanced FMLA' box checked on the Misc. Leave Charge Code.

Note: Employees will not see updated FMLA usage data on their timesheets for the same Pay Period that they entered the FMLA time. To see the updated FMLA usage, they will need to go to the next Pay Period and click the 'FMLA Usage' link.

- The 'FMLA Usage' link displays three pieces of information:
- 'Max Allowed': The maximum number of hours of FMLA the employee is allowed to use, starting on January 1st of the calendar year
- 'Used': The number of hours of FMLA time the employee has used from January 1st through the end of the previous timesheet
- 'Remaining': The remaining balance (in hours) that the employee can use (based on the end of the employee's previous timesheet)

How the FMLA Rules are Implemented in LATS

Below are the FMLA rules implemented in LATS:

1. Employees need to have worked 1250 hours in the 12 months prior to the start date of the FMLA period in order to qualify to charge to FMLA codes. The number ‘1250’ is the default, but the ‘Value’ is configurable. This should only be done by the LATS Administrator since this is a system wide setting. To access the setting, go to Table Maintenance > Configurable Settings, click on ‘Timesheet’, then click on ‘FMLAHoursWorked’. Enter the number of hours an employee must have worked in the past year to qualify to use FMLA in the ‘Value’ field.

2. Qualified Work time does not include any leave charges.

3. For a Present/Absent employee, the system will assume the default hours per day minus leave as the work hours.

4. In addition to the 1250 hours, employees must be employed for at least 12 cumulative months on the date FMLA leave is to begin.

   a. This can be determined in LATS based on existing timesheets, or the vacation leave date if the employee moved from a different agency.

   b. Time Records users and FMLA administrators can override the 1,250 hour requirement.

   c. This assumes the user determined that the employee met this requirement with time worked at another agency.

5. Once eligible, a fulltime employee can charge up to 480 hours (for an 8.00 hour per day employee) or 450 hours (for a 7.50 hours per day employee) of FMLA leave each calendar year. This balance is reset on January 1st.

6. Any Misc. Leave Code identified as FMLA counts toward the 450/480 hours, even if it comes out of another leave category (vacation, sick etc., workers comp). This is determined by the new leave code attribute ‘Enhanced FMLA Functionality’.

7. The FMLA start date can be any day within a pay period.

8. Multiple blocks can be set up at once. A block (for the length of time an FMLA case is active) defaults to 30 days, but the ‘Value’ is configurable up to 365 days per case. To do this, go to Table Maintenance > Configurable Settings, click on the word ‘Timesheet’ and then click on ‘MaxFMLACaseDays’. Enter a number in the ‘Value’ field for the amount of days FMLA cases will be active. This should only be done by the LATS Administrator since this is a system wide setting.

9. A case can be extended by another 30 days within 7 days of expiration.

10. Part time employees’ FMLA time is prorated based on their working percentage (employee percent). This includes work time and max hours charged per year (rounded to a qtr. hour). For example: Employee percent = 75, then **Hours Worked** = .75 * 1250 = 937.5 hours; and **Max charge** = .75 * 480 = 360 hours.

11. Hourly employees are not prorated even if they do not work full time schedules.

12. LATS will cap the calendar year FMLA usage at 450/480 hours (or the prorated amount). This value is a configurable setting in case it ever changes.

How to determine if Employees are Eligible to Use FMLA, and How to Add FMLA Cases

You can use the 'FMLA Qualification' page to accomplish two tasks:
1) To determine if an employee has worked the minimum required hours to qualify for FMLA and 2) to add FMLA cases.

1. **Go to Admin > FMLA Qualification.** *Note: if you do not see 'FMLA Qualification' in the 'Admin' drop down list, then review the information in this chapter titled "How to Authorize User Access to the 'FMLA Qualification' Page".*

2. **Type the employee's name in the Search field, click the 'Search' button, and then select the employee's name in the search results.** If you receive the message 'No results found matching your search', review the information in this chapter titled "How to Authorize User Access to the 'FMLA Qualification' Page" (above).

   In the 'FMLA Used To Date' field, you will see the total number of hours of FMLA that the employee has used. *Note: The 'FMLA Used to Date' field will show updated FMLA usage provided that the employee charged to Misc. Leave Codes that have the Enhanced FMLA check box checked off on the Misc. Leave Code page when the Enhanced FMLA system config setting is enabled.*

   The employee's prior FMLA cases, if any, will be listed at the bottom of the page in the 'FMLA Authorization' section. *Note: If you do not have a section titled 'FMLA Authorization' on your 'FMLA Qualification' page, then review the information on 'EnhancedFMLA' in the section in this chapter titled "How to Configure Settings for FMLA".*

3. **In the 'Qualification Date' field, enter the date that the employee is seeking to begin using FMLA (or click the calendar to the right of the 'Qualification Date' field). Then, click the 'Go' button**.

   You will now see two useful items:

   a) You will see the 'Total Hours' the employee has worked in the previous 12 months from the selected start date, along with a breakdown of how many hours were worked per Pay Period.

   b) In the 'FMLA Authorization' section, you will see a message that will tell you whether or not the employee has worked the minimum required hours to qualify for FMLA. *Note: Even if the employee has not worked the minimum required hours to qualify, LATS will still let you add an FMLA case.*

4. **To create an FMLA case, enter the Start and End dates in the 'FMLA Authorization' section (or click the calendars and select the Start and End Dates).** The 'Reason' field is optional. Then, click the 'Add & Save' button.

FMLA Related Reports

There are two 'Standard Reports' that you can access to gain FMLA-related data: the 'FMLA Usage Report' and the 'FMLA Qualification Report'.

The **'FMLA Usage Report'** is used to identify Users who have charged to FMLA leave codes in the given Calendar year (i.e., any Misc. Leave Code that contains the word "FMLA" in its 'Code Description'). The report groups FMLA charges according to employee. It also gives FMLA charge totals for each employee, and a grand total for the year. The report is located at Reports > Charge/Usage Reports > FMLA Usage Report. *Note: Remember, if you want to track FMLA usage using the 'FMLA Usage Report', then make certain that all of your FMLA codes contain "FMLA" in the 'Code Description' field. If needed, review the section in this chapter titled "Creating FMLA Codes".*

The **'FMLA Qualification Report'** can be used to determine whether an employee meets the FMLA qualification according to the number of hours worked. The report lists the number of hours worked by the employee per Pay Period; the 'Total Hours' for the fiscal year that you selected; and the 'Grand Total' number of hours that the employee has worked in the past.

Chapter 16: Workers Compensation

Topics Discussed in This Chapter:

- Configuring Workers Compensation
- Miscellaneous (Misc.) Leave Categories and Codes
- How to Create a Workers Compensation Case
- Removing a Workers Compensation Case
- How to Restore Balances
- Workers Compensation Allows Negative Adjustments
- Completing a Timesheet with Time Charged to Workers Compensation
- Workers Compensation Related Reports

Configuring Workers Compensation

'Time Records' User Role

Administrators need to have the 'Time Records' User Role to be able to access the Workers Compensation page (Admin > Workers Compensation).

Configurable Settings

Workers Compensation needs to be enabled through the Configurable Settings. This should only be changed by a LATS Administrator, since this is a system wide setting.

To access the Workers Comp-related setting, go to Table Maintenance > Configurable Settings > Timesheet > WorkersCompTab. To enable the Workers Comp tab so that it will appear on employees' timesheets, set the Value to "Yes". To disable the tab, set the Value to "No".

Miscellaneous (Misc.) Leave Categories and Codes

Misc. Leave Categories

If you need to create a new Misc. Leave Category to support your agency's specific Workers Comp policies, you can create a Workers Comp category by going to Code Maintenance > Misc. Leave Codes > Categories, and clicking on the 'Add' button. For further information on Misc. Leave Codes and Categories, see the section in Chapter 2 titled "Miscellaneous Leave Codes and Categories".

Workers Comp Codes

LATS enforces Workers Comp using Miscellaneous Leave codes. Workers Comp codes can be created by going to Code Maintenance > Misc. Leave Codes > Charge Codes, and clicking on the 'Add' button. In order for a Miscellaneous Leave code to be counted as a Workers Comp charge when the Workers Comp functionality is enabled in the Configurable Settings, the box titled 'Enhanced Workers Comp Functionality' must be checked on the charge code. For further information on Misc. Leave Codes and Categories, see the section in Chapter 2 titled "Miscellaneous Leave Codes and Categories".

How to Create a Workers Comp Case

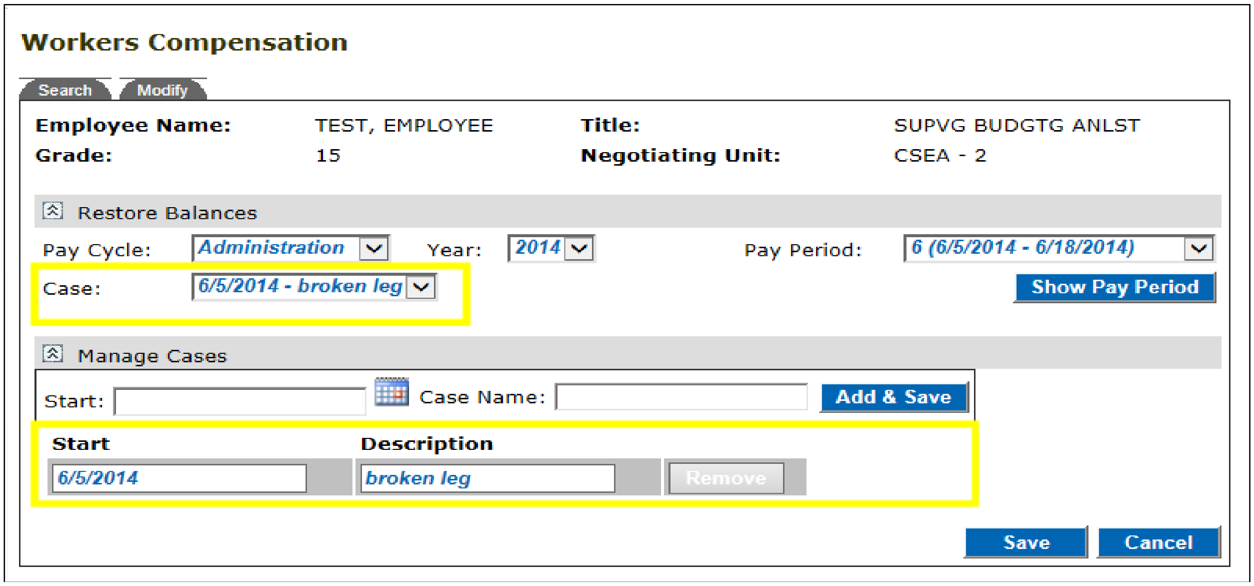
The Workers Compensation page provides authorization and tracking for workers compensation cases.

1. To add a Workers Comp case, go to Admin > Workers Compensation. In the 'Search' field, type the name of the employee, click the 'Search' button and select the employee's name from the search results. You're now on the Workers Compensation page.

2A. In the *Manage Cases* section, enter a 'Start' date and 'Case Name'. Then, click the 'Add & Save' button.

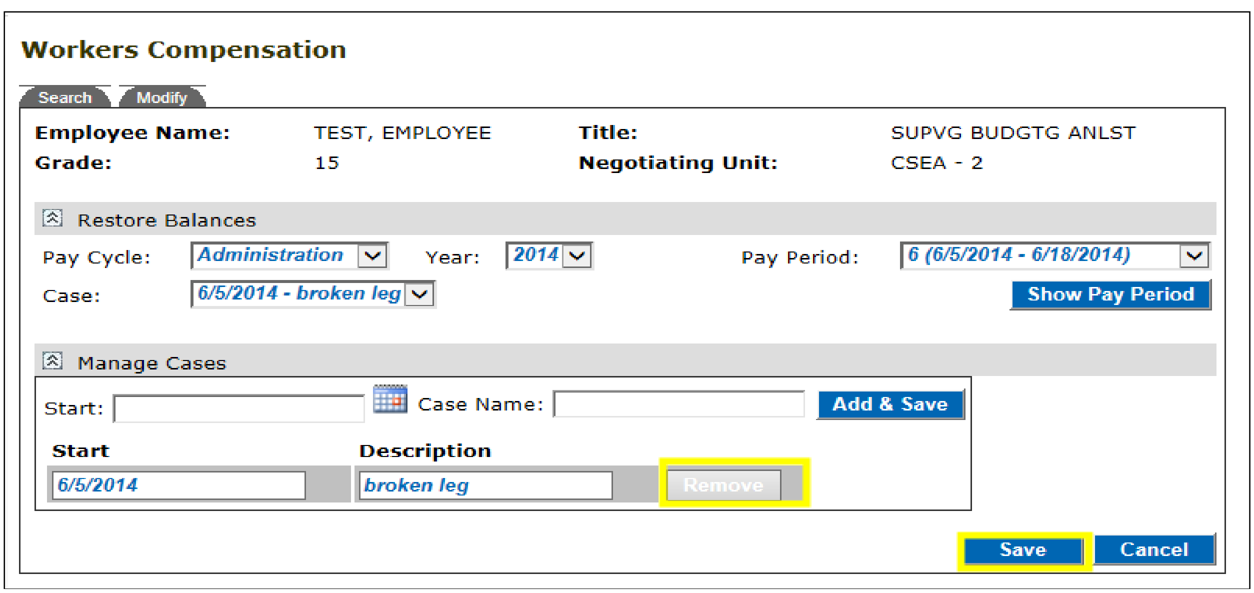
You can enter a 'Start' date by clicking on the calendar icon or typing the date in the format xx/xx/xxxx.

2B. The case will now appear at the bottom of the Manage Cases section. Also, you'll notice that in the 'Restore Balances' section, the 'Start' date and 'Case Name' you entered now appear in the *Case* dropdown.



Removing a Workers Comp Case

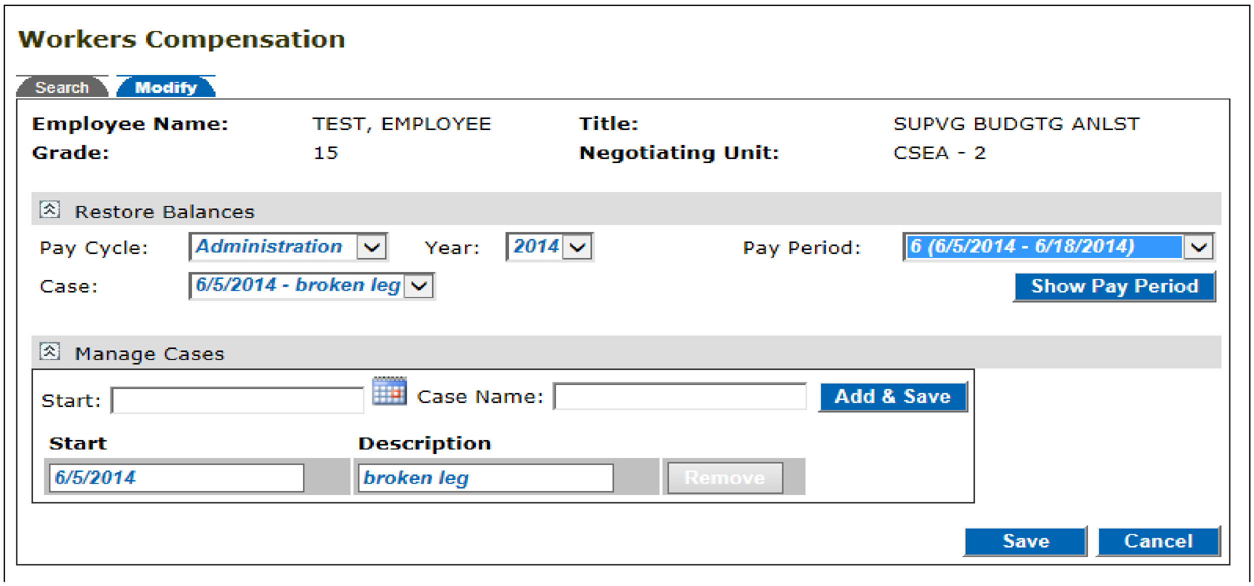
You can remove a Workers Comp case, provided that the employee has not charged time to it. To remove a case, click the gray 'Remove' button to the right of the case. Then, click the 'Save' button.



How to Restore Balances

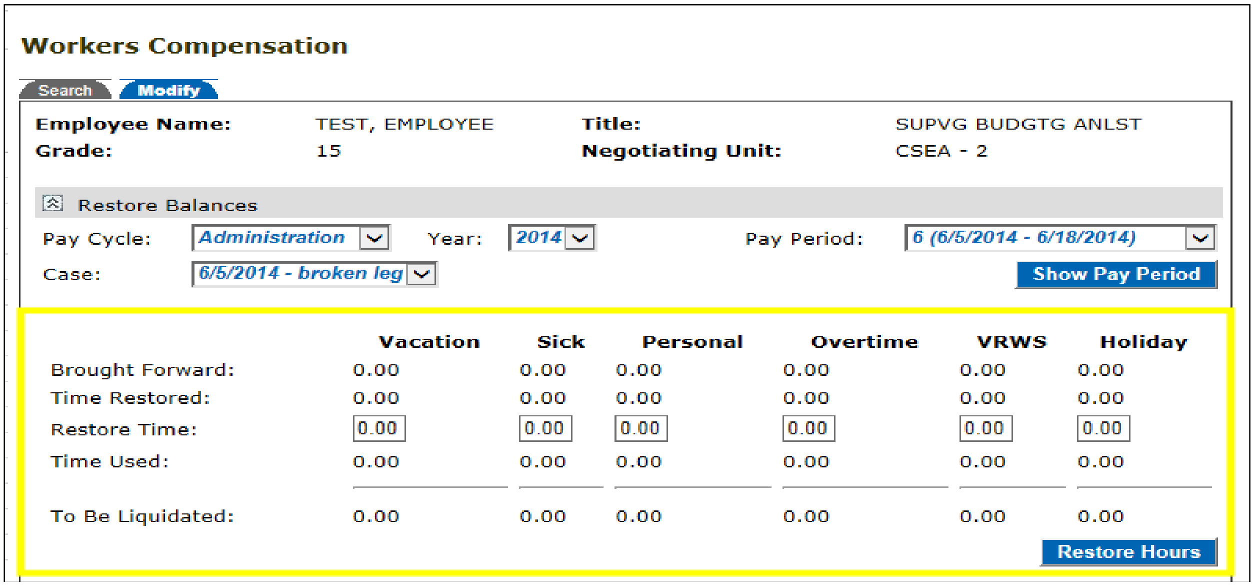
The ‘Restore Balances’ section of the Workers Comp page is used to reimburse an employee’s time that was used for Workers Comp.

1. To restore time, go to the ‘Workers Compensation’ page at Admin > Workers Compensation. In the ‘Search’ field, type the name of the employee, click the ‘Search’ button and select the employee’s name from the search results. You’re now on the ‘Workers Compensation’ page.



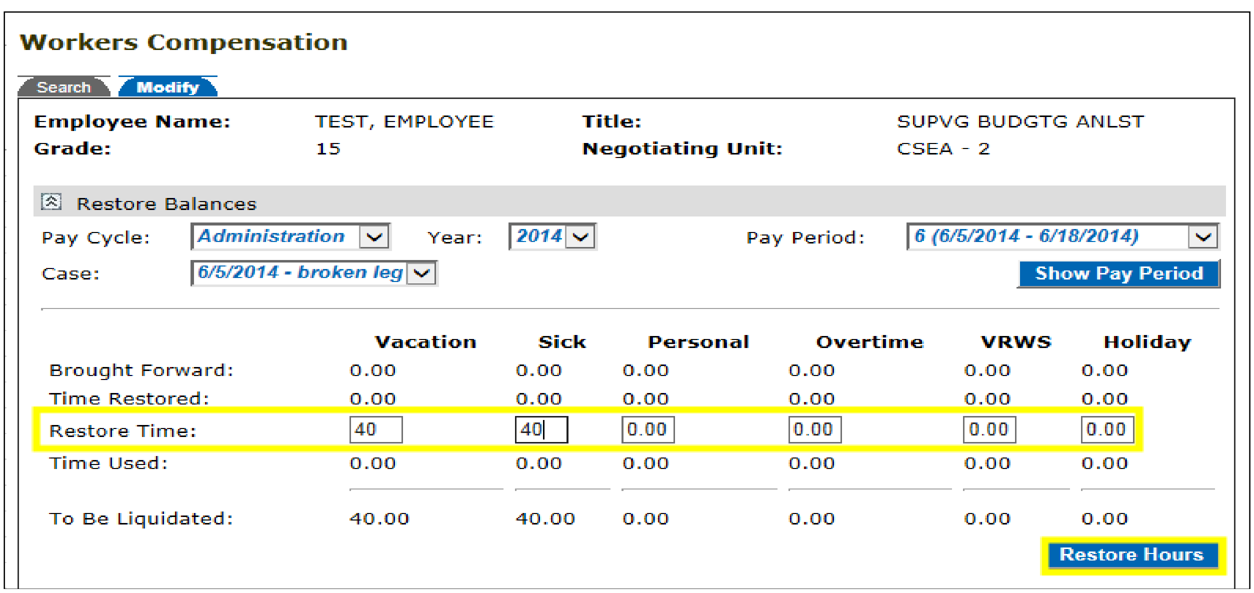
2A. In the ‘Restore Balances’ section, select ‘Pay Cycle’, ‘Year’, ‘Pay Period’ and ‘Case’. Then, click the ‘Show Pay Period’ button.

2B. You'll see that there are five rows (i.e., Brought Forward, Time Restored, Restore Time, Time Used, To Be Liquidated) with six Leave category columns (i.e., Vacation, Sick, Personal, Overtime, VRWS, Holiday).

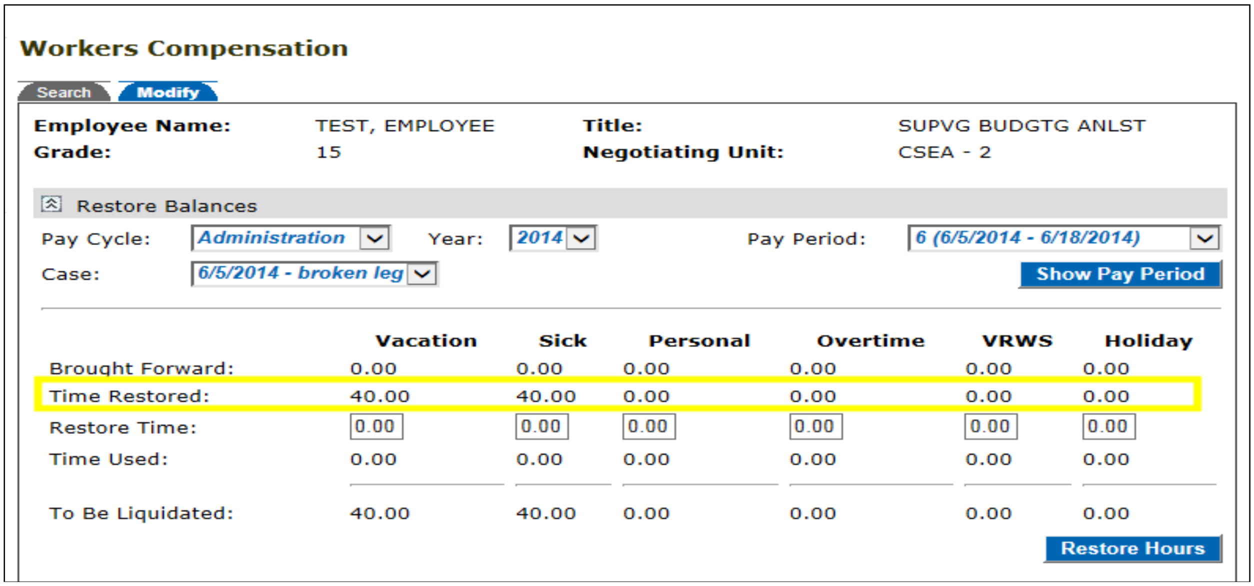


3A. Enter the number of hours you would like to restore in one or more leave category columns, and click the 'Restore Hours' button.

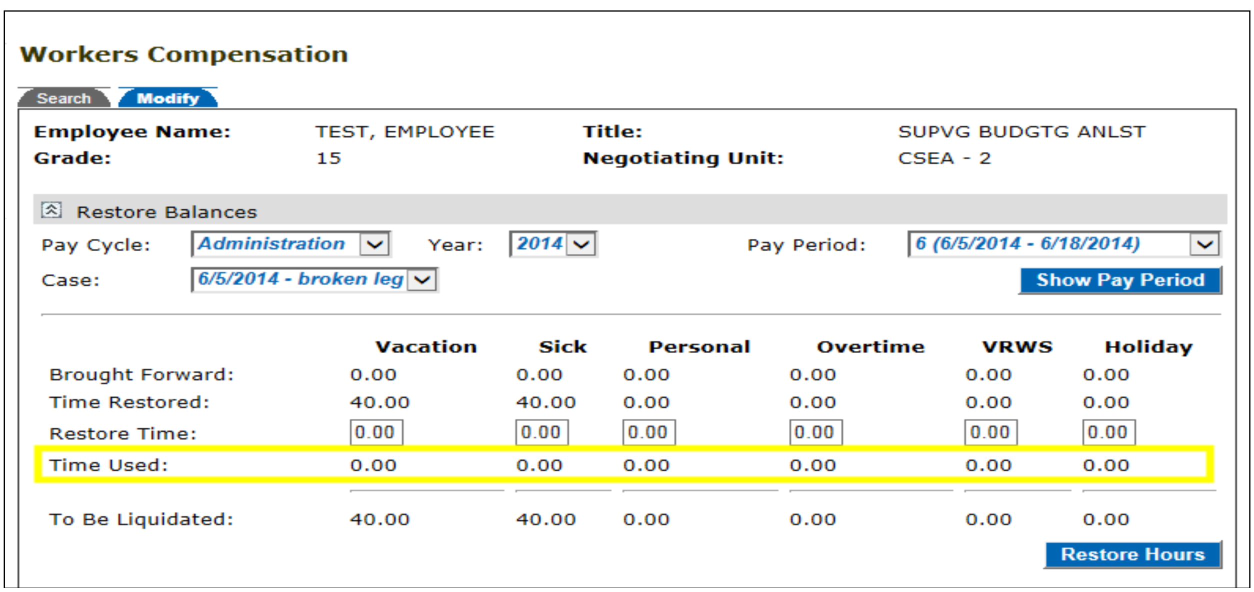
In the example below, the employee is getting time restored from Pay Period 6. The employee normally works 8 hours per day / 5 days per week. All 10 days of the Pay Period are being restored, for a total of 80 hours.



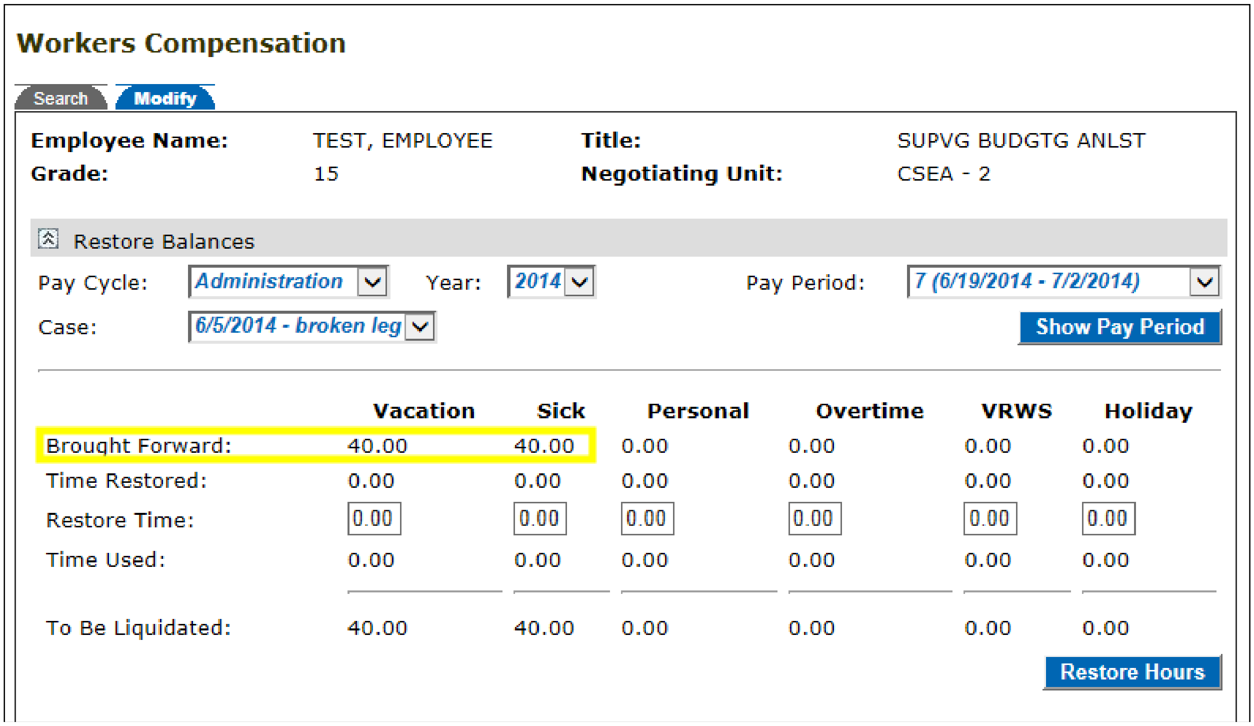
3B. Now that you have restored the time, it will appear in the **Time Restored** row.



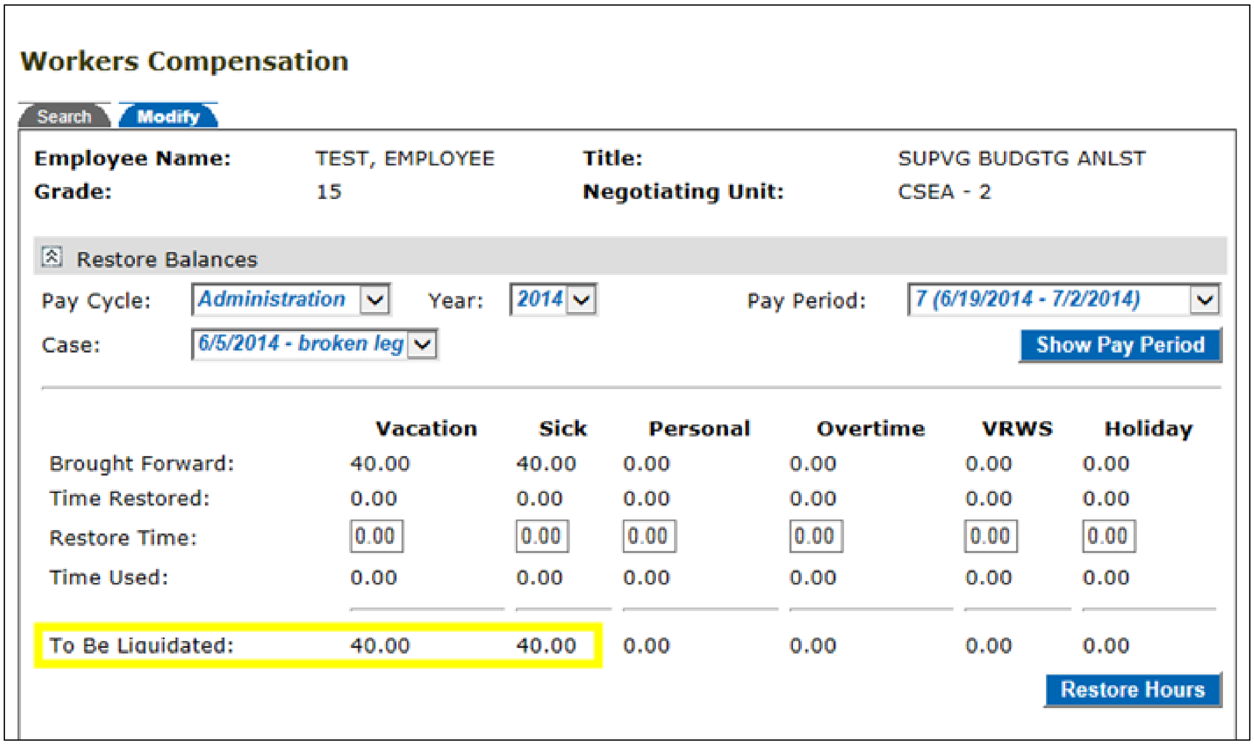
3C. If the employee used leave time which is NOT associated with the Workers Comp case, it will appear in the **Time Used** row.



3D. If you go to the employee's next Pay Period (in this example, the next Pay Period is 7), you will see the amount of time brought forward in the **Brought Forward** row.

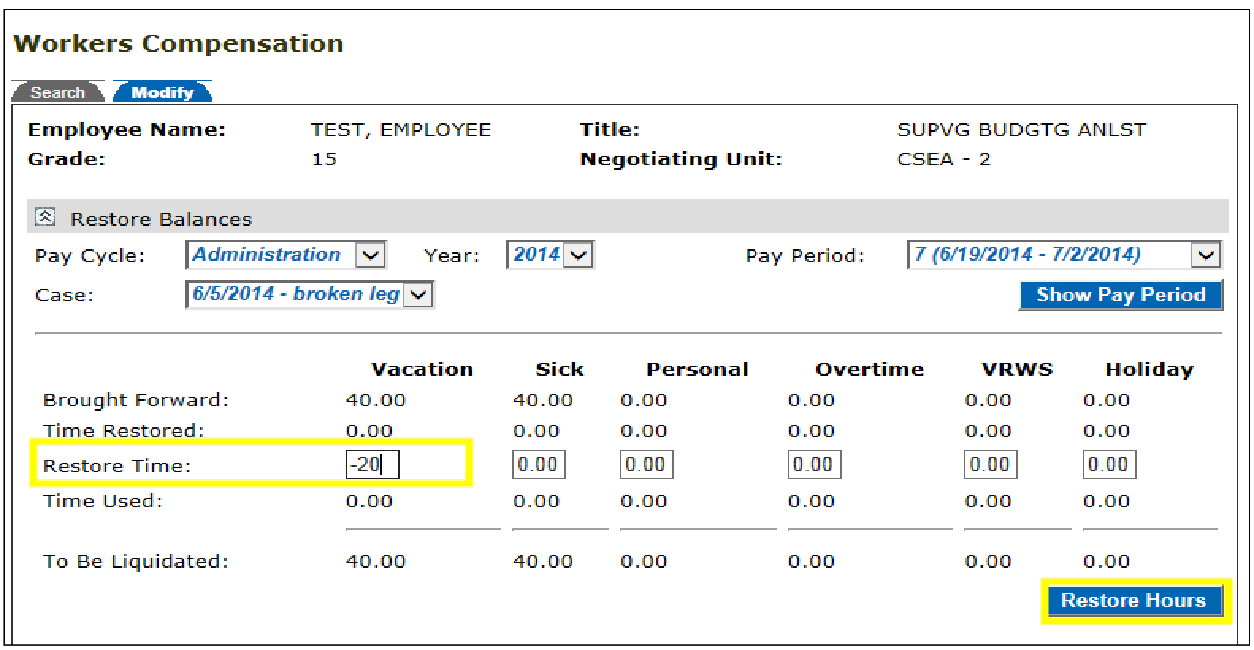


3E. In the **To Be Liquidated** row, you'll see the amount of time that was restored for the employee.

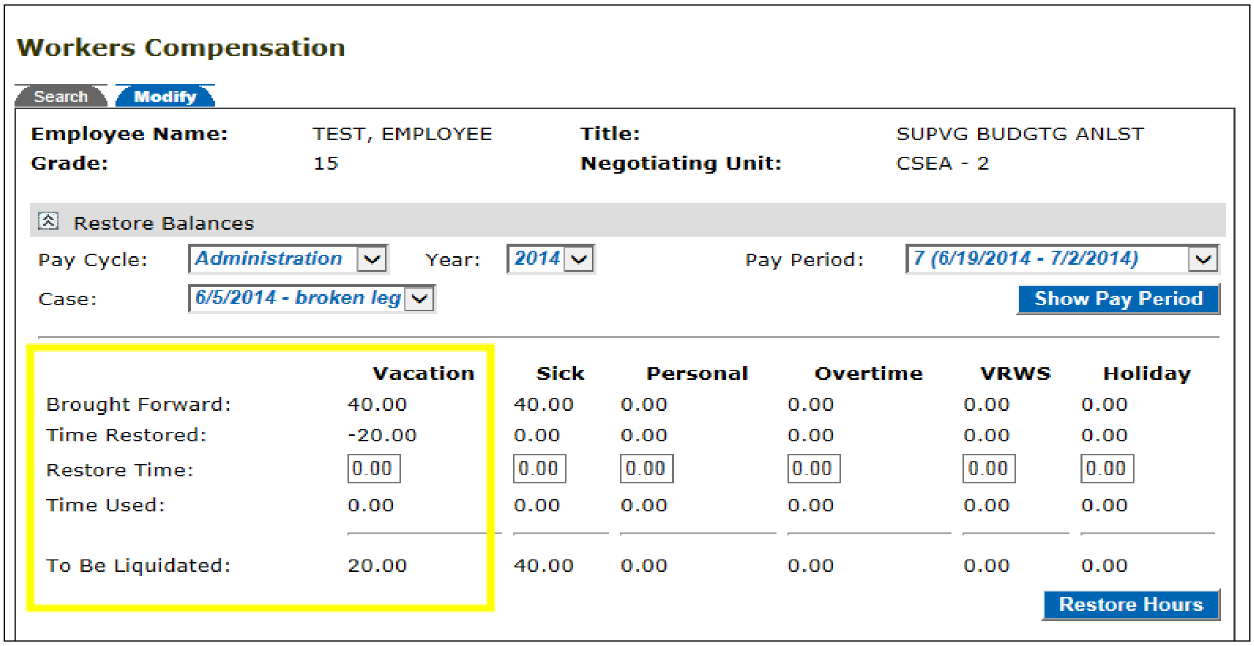


Workers Compensation Allows Negative Adjustments

The workers compensation page has been enhanced to allow negative adjustments to a category if an administrator incorrectly credits time to an employee.



After you click the ‘Restore Hours’ button, the ‘Time Restored’ and ‘To Be Liquidated’ rows are updated:



Workers Compensation

Search | Modify

Employee Name:	TEST, EMPLOYEE	**Title:**	SUPVG BUDGTG ANLST
Grade:	15	**Negotiating Unit:**	CSEA - 2

Restore Balances

Pay Cycle: Administration Year: 2014 Pay Period: 7 (6/19/2014 - 7/2/2014)

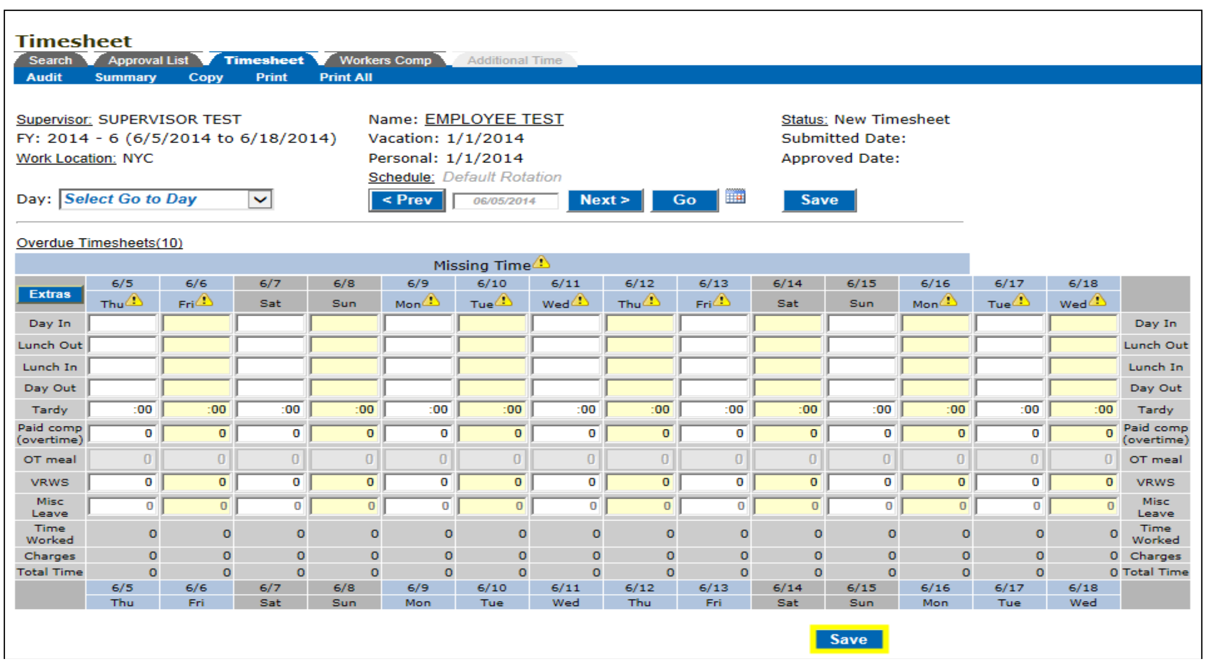
Case: 6/5/2014 - broken leg Show Pay Period

	Vacation	Sick	Personal	Overtime	VRWS	Holiday
Brought Forward:	40.00	40.00	0.00	0.00	0.00	0.00
Time Restored:	-20.00	0.00	0.00	0.00	0.00	0.00
Restore Time:	0.00	0.00	0.00	0.00	0.00	0.00
Time Used:	0.00	0.00	0.00	0.00	0.00	0.00
To Be Liquidated:	20.00	40.00	0.00	0.00	0.00	0.00

Restore Hours

Completing a Timesheet with Time Charged to Workers Comp

1. Go to the timesheet for the Pay Period that you'll be entering Workers Comp leave. Then, click the 'Save' button to get the 'Leave' drop down to appear.



Timesheet

Search | Approval List | Timesheet | Workers Comp | Additional Time

Audit | Summary | Copy | Print | Print All

Supervisor: SUPERVISOR TEST
FY: 2014 - 6 (6/5/2014 to 6/18/2014)
Work Location: NYC

Name: EMPLOYEE TEST
Vacation: 1/1/2014
Personal: 1/1/2014
Schedule: Default Rotation

Status: New Timesheet
Submitted Date:
Approved Date:

Day: Select Go to Day < Prev 06/05/2014 Next > Go Save

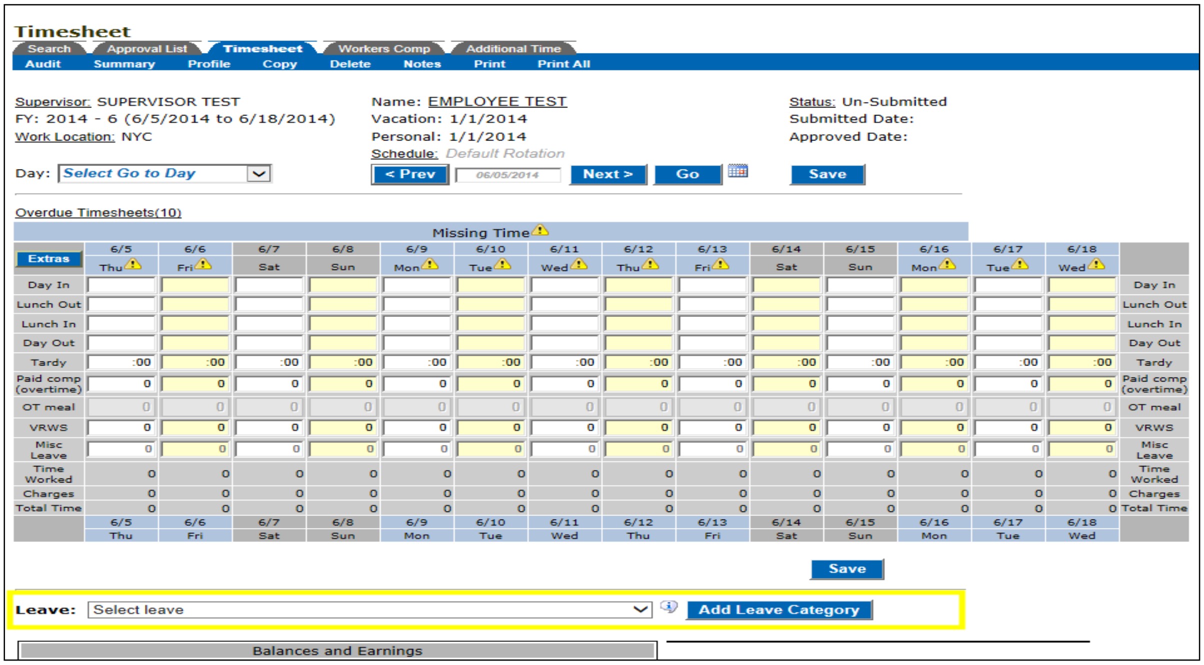
Overdue Timesheets(10)

Missing Time

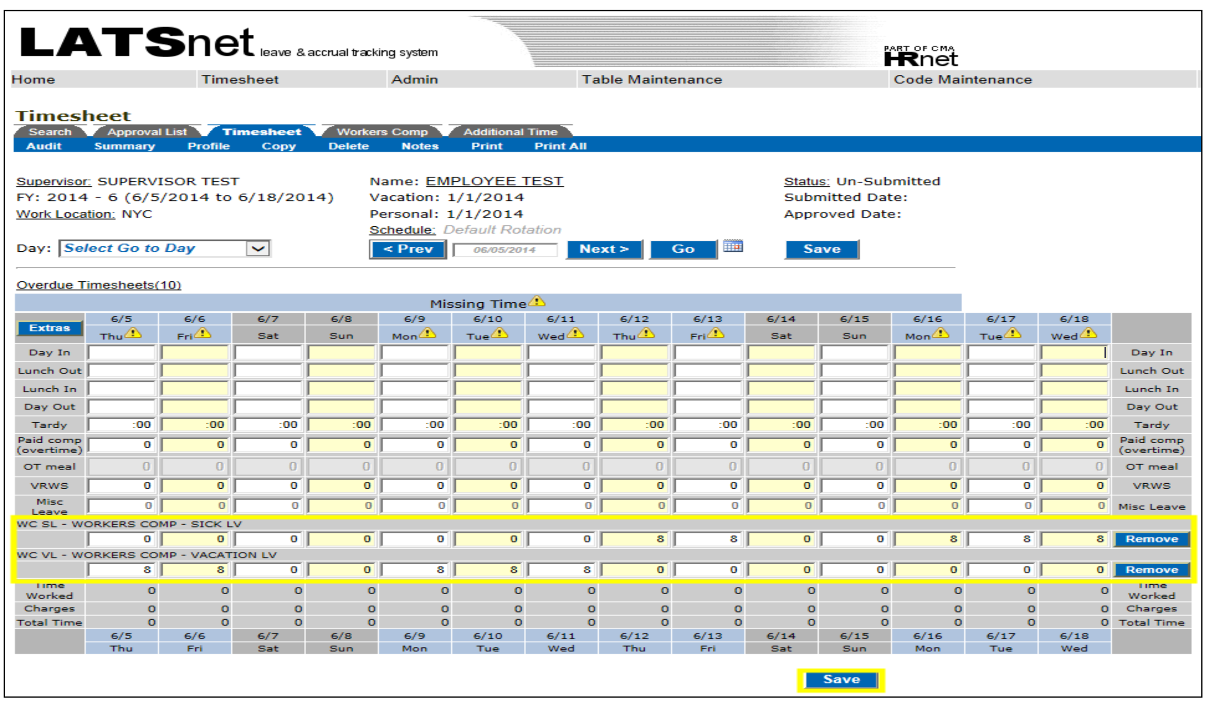
Extras	6/5 Thu	6/6 Fri	6/7 Sat	6/8 Sun	6/9 Mon	6/10 Tue	6/11 Wed	6/12 Thu	6/13 Fri	6/14 Sat	6/15 Sun	6/16 Mon	6/17 Tue	6/18 Wed	
Day In															Day In
Lunch Out															Lunch Out
Lunch In															Lunch In
Day Out															Day Out
Tardy	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	Tardy
Paid comp (overtime)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Paid comp (overtime)
OT meal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	OT meal
VRWS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	VRWS
Misc Leave	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Misc Leave
Time Worked	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Time Worked
Charges	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Charges
Total Time	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Total Time
	6/5 Thu	6/6 Fri	6/7 Sat	6/8 Sun	6/9 Mon	6/10 Tue	6/11 Wed	6/12 Thu	6/13 Fri	6/14 Sat	6/15 Sun	6/16 Mon	6/17 Tue	6/18 Wed	

Save

2. Click on the 'Leave' drop down and select the appropriate Workers Comp code. Click the 'Add Leave Category' button. If there are additional Workers Comp codes that you will be using, then repeat this step as needed.

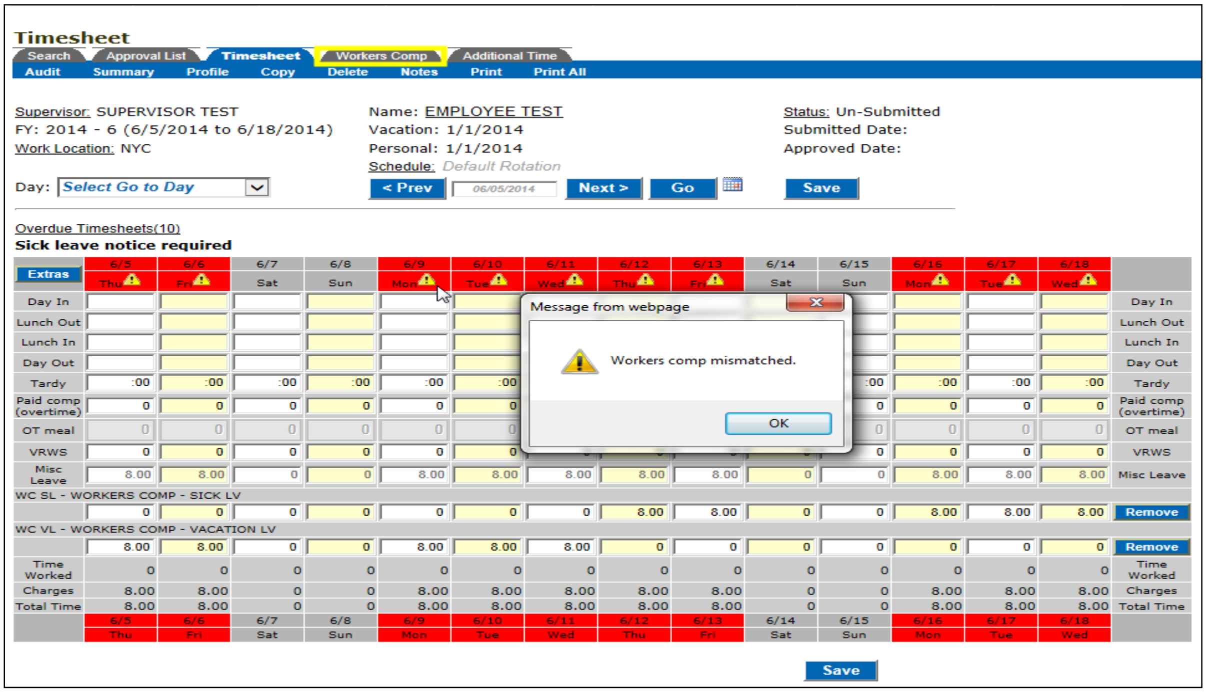


3. Enter the appropriate number of hours in the misc. leave row(s). Then, click the 'Save' button.

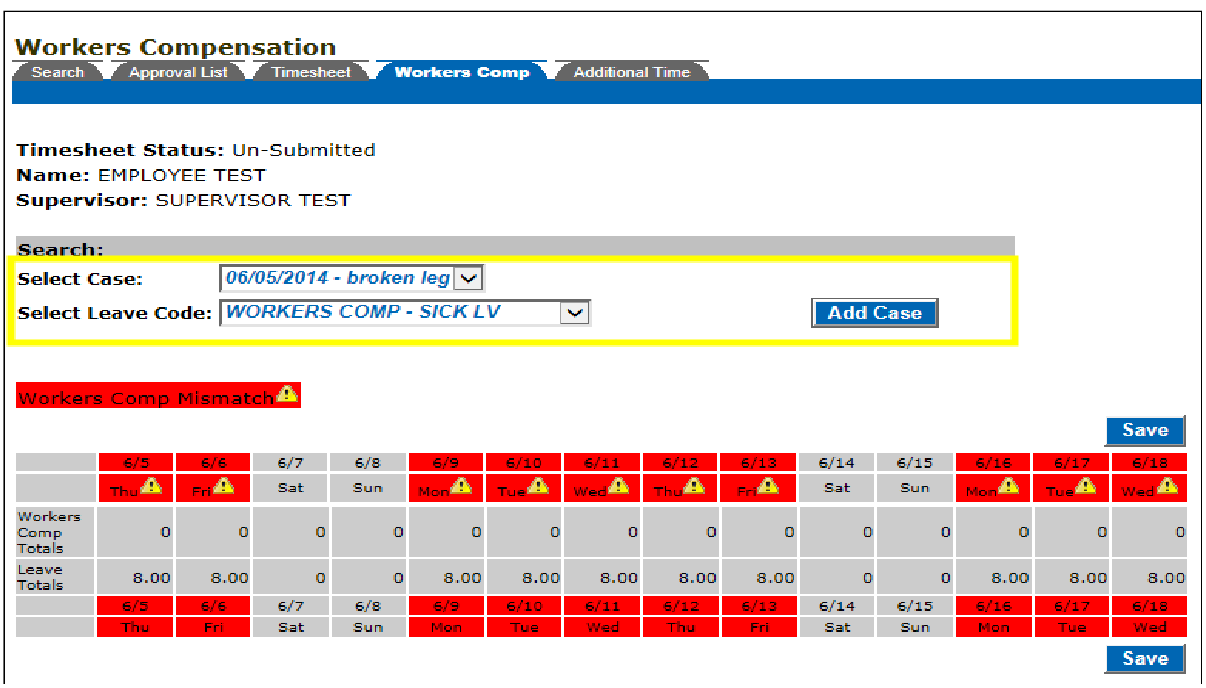


4. LATS will now display a red "Workers Comp Mismatched" error on the timesheet (The pop up message that explains the error will only appear if you click on one of the yellow triangles). Next, you'll go to the 'Workers Comp' tab and distribute the time charged to the Workers Comp case.

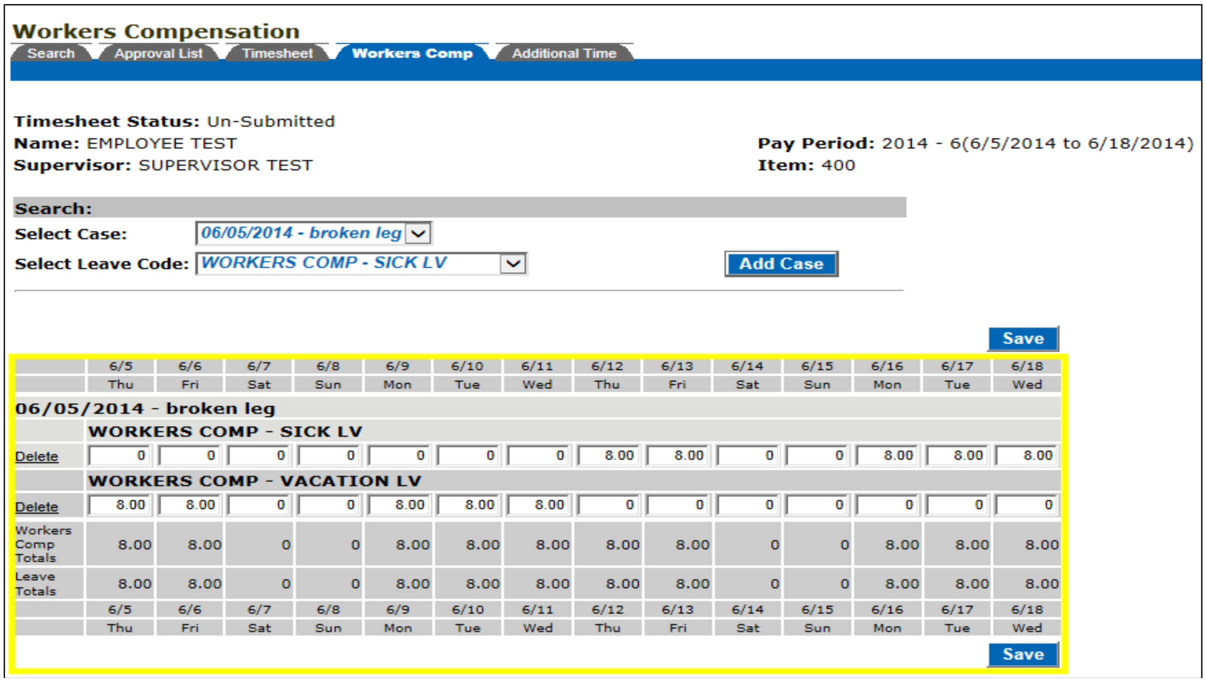
Click on the 'Workers Comp' tab.



5. Select the Case and Leave Code by clicking on the drop down menus next to 'Select Case' and 'Select Leave Code'. Then, click the 'Add Case' button. If there are additional Leave Codes that you will be using, then repeat this step as needed.



6. Enter your Workers Comp time. Click the 'Save' button. If there are additional Workers Comp cases for the same Pay Period, then repeat steps 5 and 6 as needed. Once you are done, you can return to your timesheet by clicking on the 'Timesheet' tab.



Workers Compensation

Search | Approval List | Timesheet | Workers Comp | Additional Time

Timesheet Status: Un-Submitted
Name: EMPLOYEE TEST
Supervisor: SUPERVISOR TEST
Pay Period: 2014 - 6(6/5/2014 to 6/18/2014)
Item: 400

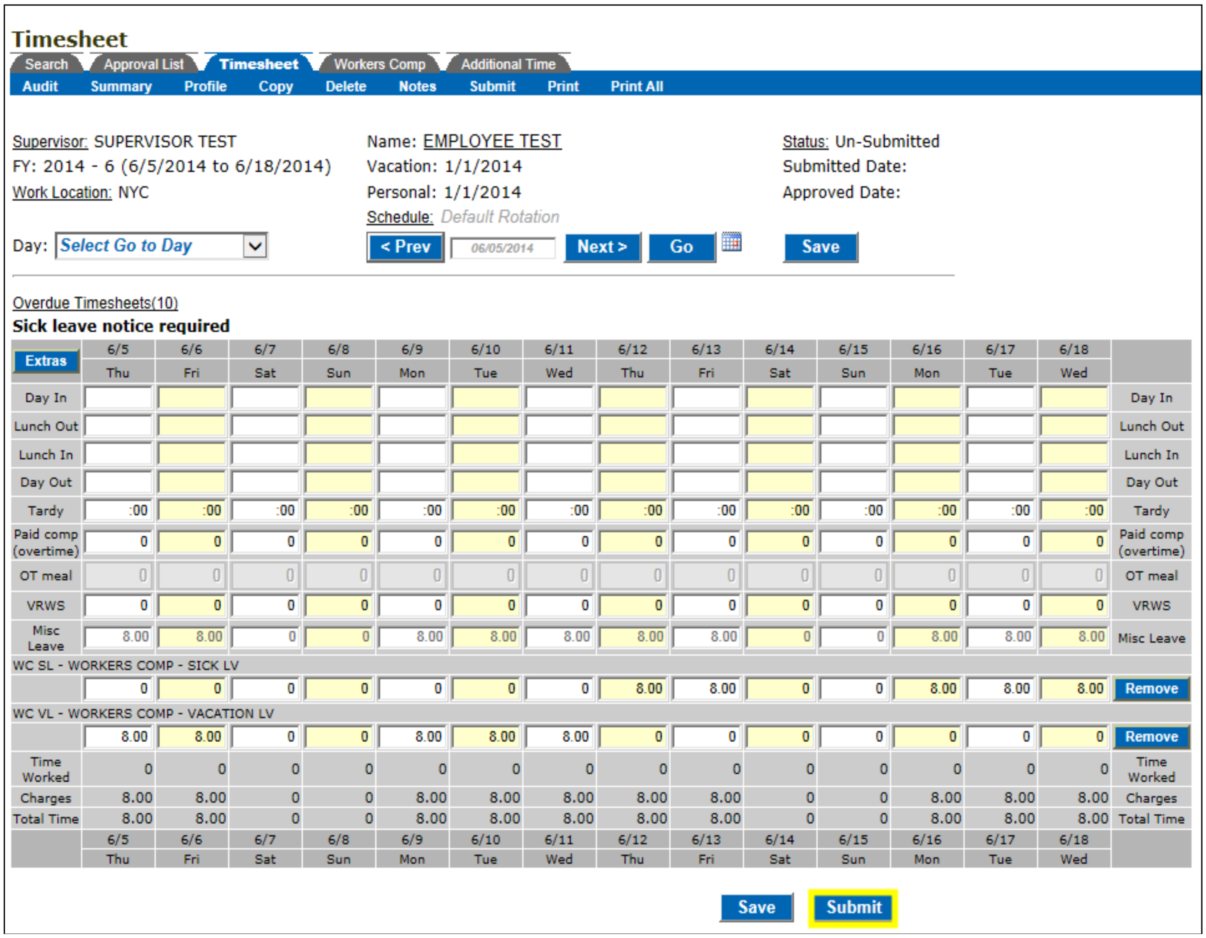
Search:
Select Case: 06/05/2014 - broken leg
Select Leave Code: WORKERS COMP - SICK LV
Add Case

Save

	6/5 Thu	6/6 Fri	6/7 Sat	6/8 Sun	6/9 Mon	6/10 Tue	6/11 Wed	6/12 Thu	6/13 Fri	6/14 Sat	6/15 Sun	6/16 Mon	6/17 Tue	6/18 Wed
06/05/2014 - broken leg														
WORKERS COMP - SICK LV														
Delete	0	0	0	0	0	0	0	8.00	8.00	0	0	8.00	8.00	8.00
WORKERS COMP - VACATION LV														
Delete	8.00	8.00	0	0	8.00	8.00	8.00	0	0	0	0	0	0	0
Workers Comp Totals	8.00	8.00	0	0	8.00	8.00	8.00	8.00	8.00	0	0	8.00	8.00	8.00
Leave Totals	8.00	8.00	0	0	8.00	8.00	8.00	8.00	8.00	0	0	8.00	8.00	8.00
	6/5 Thu	6/6 Fri	6/7 Sat	6/8 Sun	6/9 Mon	6/10 Tue	6/11 Wed	6/12 Thu	6/13 Fri	6/14 Sat	6/15 Sun	6/16 Mon	6/17 Tue	6/18 Wed

Save

7. Once you have entered all of your time for the Pay Period, click the 'Submit' button.



Timesheet

Search | Approval List | Timesheet | Workers Comp | Additional Time

Audit | Summary | Profile | Copy | Delete | Notes | Submit | Print | Print All

Supervisor: SUPERVISOR TEST
FY: 2014 - 6 (6/5/2014 to 6/18/2014)
Work Location: NYC

Name: EMPLOYEE TEST
Vacation: 1/1/2014
Personal: 1/1/2014
Schedule: Default Rotation

Status: Un-Submitted
Submitted Date:
Approved Date:

Day: Select Go to Day | < Prev | 06/05/2014 | Next > | Go | Save

Overdue Timesheets(10)

Sick leave notice required

Extras	6/5 Thu	6/6 Fri	6/7 Sat	6/8 Sun	6/9 Mon	6/10 Tue	6/11 Wed	6/12 Thu	6/13 Fri	6/14 Sat	6/15 Sun	6/16 Mon	6/17 Tue	6/18 Wed	
Day In															Day In
Lunch Out															Lunch Out
Lunch In															Lunch In
Day Out															Day Out
Tardy	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	Tardy
Paid comp (overtime)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Paid comp (overtime)
OT meal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	OT meal
VRWS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	VRWS
Misc Leave	8.00	8.00	0	0	8.00	8.00	8.00	8.00	8.00	0	0	8.00	8.00	8.00	Misc Leave
WC SL - WORKERS COMP - SICK LV															
	0	0	0	0	0	0	0	8.00	8.00	0	0	8.00	8.00	8.00	Remove
WC VL - WORKERS COMP - VACATION LV															
	8.00	8.00	0	0	8.00	8.00	8.00	0	0	0	0	0	0	0	Remove
Time Worked	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Time Worked
Charges	8.00	8.00	0	0	8.00	8.00	8.00	8.00	8.00	0	0	8.00	8.00	8.00	Charges
Total Time	8.00	8.00	0	0	8.00	8.00	8.00	8.00	8.00	0	0	8.00	8.00	8.00	Total Time
	6/5 Thu	6/6 Fri	6/7 Sat	6/8 Sun	6/9 Mon	6/10 Tue	6/11 Wed	6/12 Thu	6/13 Fri	6/14 Sat	6/15 Sun	6/16 Mon	6/17 Tue	6/18 Wed	

Save | Submit

Workers Comp-Related Reports

Miscellaneous Leave reports can be run to gain information on employee Leave that was charged to Workers Comp. There are two ‘Standard Reports’ that can be used to access Workers Comp-related data: ‘Misc. Charged Hours Report’ and ‘Misc. Charged Hours – Exceptions Report’.

‘Misc. Charged Hours Report’ is used to identify **Time and Attendance Eligible Employees** (i.e., employees who accrue leave) who have charged to Miscellaneous Leave codes (including Workers Comp). The report also provides a total for each miscellaneous charge. The ‘Misc. Charged Hours Report’ is located at Reports > Charge/Usage Reports > ‘Misc. Charged Hours Report’. All fields except ‘Misc. Codes Charged’ are required.

‘Misc. Charged Hours – Exceptions Report’ is used to identify **Time and Attendance Ineligible Employee**s (i.e., employees who do not accrue leave) who have charged to Miscellaneous Leave codes (including Workers Comp). The report is located at Reports > Charge/Usage Reports > ‘Misc. Charged Hours - Exceptions Report’. To run the report, enter in the Pay Period range.

Chapter 17: Enhanced Overtime Rules

LATS manages enhanced overtime requirements when an employee has overtime and unscheduled sick leave in the same week. If an employee works voluntary overtime and has unscheduled sick leave or LWOP in the same week, the overtime is converted to straight time up to the number of unscheduled sick leave hours. If an employee works mandatory overtime and has unscheduled sick leave or LWOP in the same week, the overtime is NOT converted to straight time and the employee is paid overtime at the overtime rate. The following configurations are required for the enhanced overtime logic to be in effect:

- The Negotiating Unit must have the Use Enhanced OT Rules dropdown set to **Yes**.

Use Enhanced OT Rules: Yes

- The associated misc. leave codes must have the Enhanced OT check box checked.

Enhanced Overtime functionality: ☑

When these settings are configured the timesheet and associated payments process as displayed below.

In the example below the employee has 7.00 hours OT (2.50 ENC and 4.50 Pd OT).

Supervisor: TRICIA TEETER
FY: 2015 - 9 (7/16/2015 to 7/29/2015)

Name: OSC ENHANCEDOT
Vacation: 7/1/2011
Personal: 7/1/2011
Schedule: *Default Rotation*

Status: Processed
Submitted Date: 8/5/2015 7:52:34 AM
Approved Date: 8/5/2015 7:52:38 AM

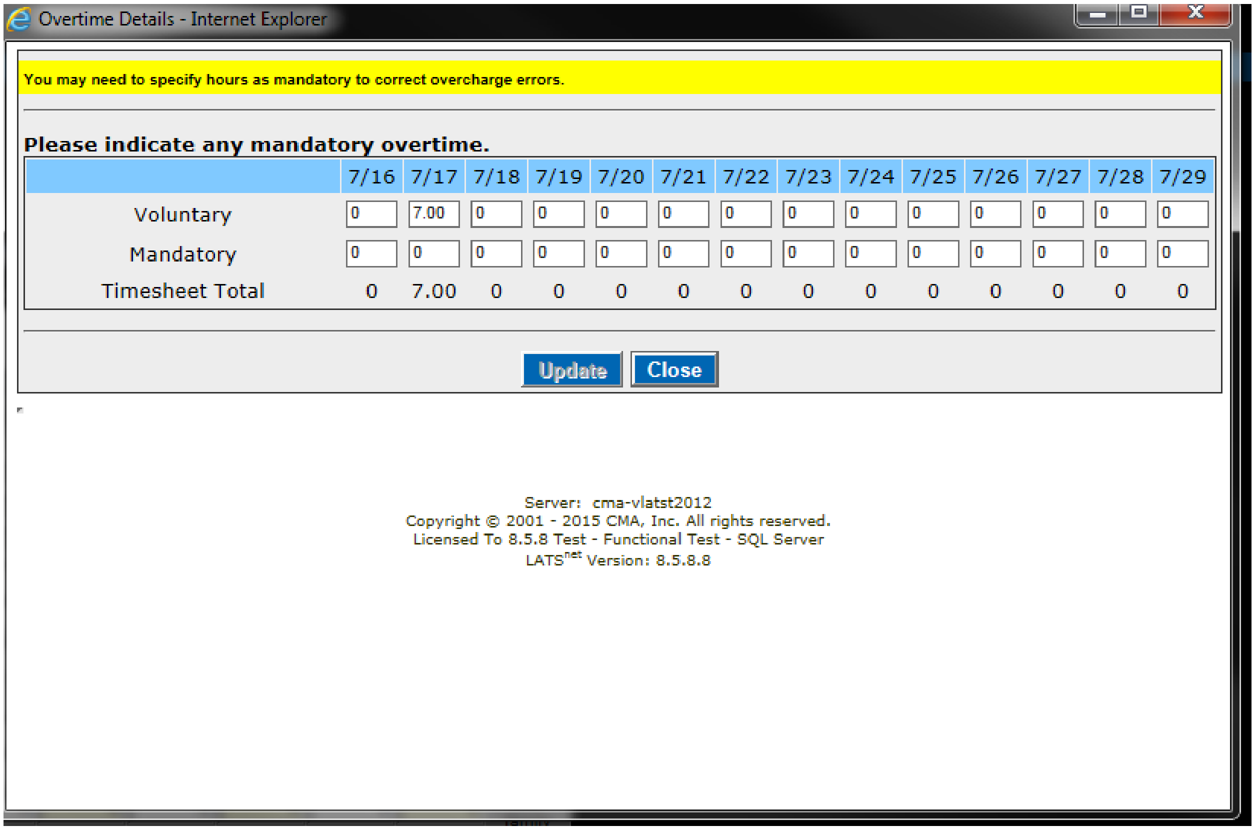
< Prev | 07/16/2015 | Next > | Go

Overdue Timesheets(1)

View Overtime Details

Extras	7/16 Thu	7/17 Fri	7/18 Sat	7/19 Sun	7/20 Mon	7/21 Tue	7/22 Wed	7/23 Thu	7/24 Fri	7/25 Sat	7/26 Sun	7/27 Mon	7/28 Tue	7/29 Wed	
Day In	7:00 AM	7:00 AM				7:00 AM	7:00 AM	7:00 AM	7:00 AM			7:00 AM	7:00 AM	7:00 AM	Day In
Lunch Out	12:00 PM					12:00 PM	12:00 PM	12:00 PM	12:00 PM			12:00 PM	12:00 PM	12:00 PM	Lunch Out
Lunch In	12:30 PM					12:30 PM	12:30 PM	12:30 PM	12:30 PM			12:30 PM	12:30 PM	12:30 PM	Lunch In
Day Out	3:00 PM	9:30 PM				3:00 PM	3:00 PM	3:00 PM	3:00 PM			3:00 PM	3:00 PM	3:00 PM	Day Out
Tardy	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	Tardy
Earned Non comp	0	2.50	0	0	0	0	0	0	0	0	0	0	0	0	Earned Non comp
Paid comp (overtime)	0	4.50	0	0	0	0	0	0	0	0	0	0	0	0	Paid comp (overtime)
OT meal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	OT meal
Vacation	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Vacation
Sick-regular	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Sick-regular
Sick-family	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Sick-family
Personal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Personal
NonComp	0	0	0	0	0	0	0	0	0	0	0	0	0	0	NonComp
Holiday	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Holiday
VRWS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	VRWS
Misc Leave	0	0	0	0	7.50	0	0	0	0	0	0	0	0	0	Misc Leave
UNATH LWOP - UNAUTHORIZED LWOP															
	0	0	0	0	7.50	0	0	0	0	0	0	0	0	0	
Time Worked	7.50	14.50	0	0	0	7.50	7.50	7.50	7.50	0	0	7.50	7.50	7.50	Time Worked
Charges	0	0	0	0	7.50	0	0	0	0	0	0	0	0	0	Charges
Total Time	7.50	14.50	0	0	7.50	7.50	7.50	7.50	7.50	0	0	7.50	7.50	7.50	Total Time
	7/16 Thu	7/17 Fri	7/18 Sat	7/19 Sun	7/20 Mon	7/21 Tue	7/22 Wed	7/23 Thu	7/24 Fri	7/25 Sat	7/26 Sun	7/27 Mon	7/28 Tue	7/29 Wed	

The overtime was reported as voluntary on the Overtime Details confirmation page.


Overtime Details - Internet Explorer

You may need to specify hours as mandatory to correct overcharge errors.

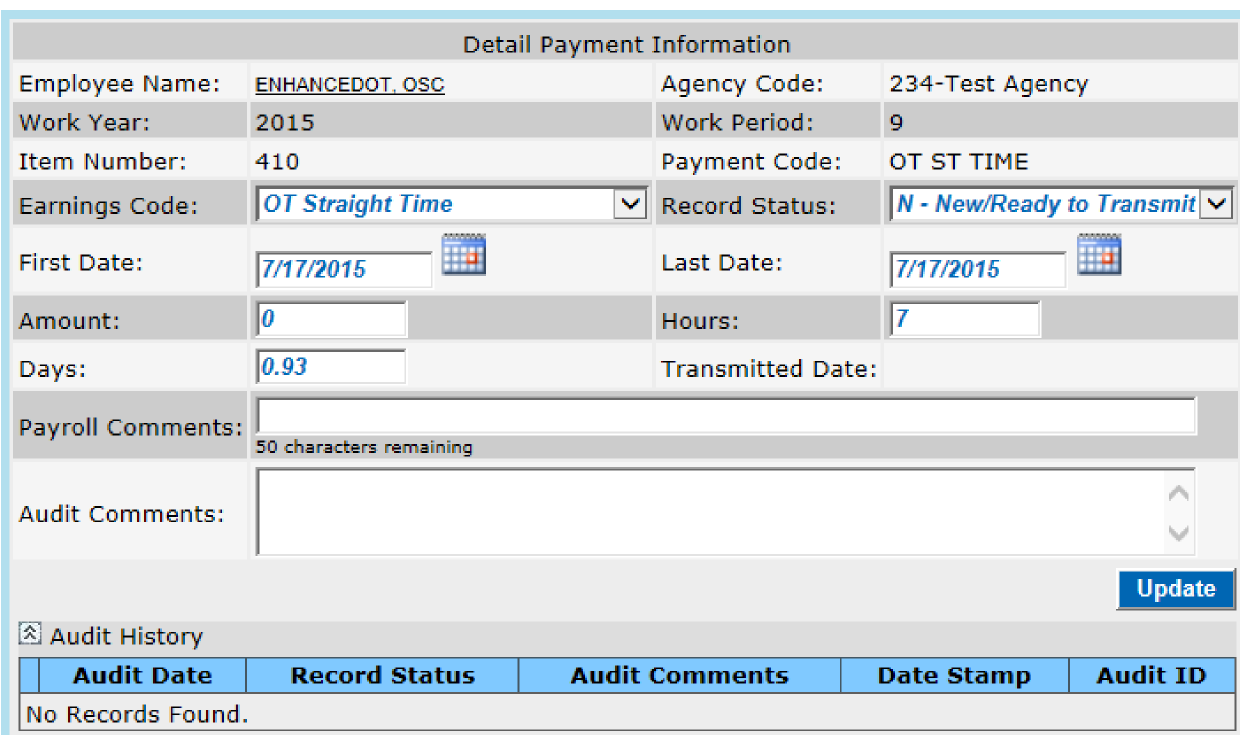
Please indicate any mandatory overtime.

	7/16	7/17	7/18	7/19	7/20	7/21	7/22	7/23	7/24	7/25	7/26	7/27	7/28	7/29
Voluntary	0	7.00	0	0	0	0	0	0	0	0	0	0	0	0
Mandatory	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Timesheet Total	0	7.00	0	0	0	0	0	0	0	0	0	0	0	0

Update Close

Server: cma-vlatst2012
Copyright © 2001 - 2015 CMA, Inc. All rights reserved.
Licensed To 8.5.8 Test - Functional Test - SQL Server
LATSnet Version: 8.5.8.8

The end result will be for the overtime payment to be for 7.00 straight hours with zero earned non comp earned and 0 hours OT pay. The payment record will reflect 7.00 at straight time.


Detail Payment Information			
Employee Name:	ENHANCEDOT, OSC	Agency Code:	234-Test Agency
Work Year:	2015	Work Period:	9
Item Number:	410	Payment Code:	OT ST TIME
Earnings Code:	OT Straight Time	Record Status:	N - New/Ready to Transmit
First Date:	7/17/2015	Last Date:	7/17/2015
Amount:	0	Hours:	7
Days:	0.93	Transmitted Date:	
Payroll Comments:	50 characters remaining		
Audit Comments:			

Update

Audit History

Audit Date	Record Status	Audit Comments	Date Stamp	Audit ID
No Records Found.				

Chapter 18: Employee Driven Timesheet Schedules, AWS and Compressed Work Week

Topics Discussed in This Chapter:

- Employee Driven Timesheet Schedules
- Alternate Work Schedules (AWS)
- Compressed Work Schedules

Employee Driven Timesheet Schedules

Some agencies allow employees the flexibility of setting up their own schedules, within certain agency established guidelines, which allows for flexibility as long as the employee is working within their expected hours per week/pay period. LATS allows several options to meet this requirement. *Note: It is assumed that the employee has already obtained supervisor approval before defining their own schedule.*

Expected Hours per Day

If configured, LATS allows employees to set their expected hours per day for a work week. If overtime eligible, employees expected hours for the week must still equal the expected 35/37.50/40 hours per week but LATS will allow for the employee to identify how many hours per day LATS should look for on each day for purposes of calculating OT and other timesheet edits.

Below is an example of what the timesheet would look like for an OT ineligible employee and an OT eligible employee.

Overtime Ineligible employee timesheet

Missing Time															
	7/2	7/3	7/4	7/5	7/6	7/7	7/8	7/9	7/10	7/11	7/12	7/13	7/14	7/15	
	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	
Schedule	8:00	8:00	:00	:00	8:00	8:00	8:00	8:45	:00	:00	:00	8:45	8:45	8:45	Schedule
Present	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	Present
Absent	☑	☑	☐	☐	☑	☑	☑	☑	☐	☐	☐	☑	☐	☐	Absent
Tardy	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	Tardy
OT meal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	OT meal
Vacation	8:00	8:00	:00	:00	:00	8:00	8:00	8:45	:00	:00	:00	:00	:00	:00	Vacation

Overtime Eligible employee timesheet

Missing Time															
Extras	6/18 Thu	6/19 Fri	6/20 Sat	6/21 Sun	6/22 Mon	6/23 Tue	6/24 Wed	6/25 Thu	6/26 Fri	6/27 Sat	6/28 Sun	6/29 Mon	6/30 Tue	7/1 Wed	
Schedule	7:30	7:30	:00	:00	7:30	7:30	7:30	7:30	7:30	:00	:00	7:30	7:30	7:30	Schedule
Day In	7:00 AM	7:30 AM			7:30 AM	7:30 AM	7:30 AM	7:00 AM				7:30 AM			Day In
Lunch Out	12:30 PM	12:30 PM			12:30 PM	12:30 PM	12:30 PM	12:30 PM				12:30 PM			Lunch Out
Lunch In	1:00 PM	1:00 PM			1:00 PM	1:00 PM	1:00 PM	1:00 PM				1:00 PM			Lunch In
Day Out	3:30 PM	1:30 PM			3:30 PM	3:30 PM	3:30 PM	5:30 PM				3:30 PM			Day Out
Tardy	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	Tardy
Earned Non comp	:30	:00	:00	:00	:00	:00	:00	2:30	:00	:00	:00	:00	:00	:00	Earned Non comp
Paid comp (overtime)	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	:00	Paid comp (overtime)

Agencies must turn on the following configuration settings if they would like to offer this type of self-service scheduling to their employees: General>Alternate Normal Hours = Y and timesheetscheduleEdit = Y. In addition, the Timesheet Validation on the employees Accrual tab of their employee admin record MUST be set to **Schedules**.

If these configurations are set up the employee will have the ability to update the expected hours on their timesheet by performing the following steps:

1. The employee would click on the Schedule link row on the timesheet.

Schedule	7:30	7:30	:00	:00	7:30	7:30	7:30	7:30	7:30	:00	:00	7:30	7:30	7:30	Schedule

2. Clicking the link displays an Edit Schedule row where the employee can modify their expected hours per day. **The employee must click the Save button on the right hand side of the Edit Schedule row to save the modified expected hours per day schedule.**

Extras	9/24 Thu	9/25 Fri	9/26 Sat	9/27 Sun	9/28 Mon	9/29 Tue	9/30 Wed	10/1 Thu	10/2 Fri	10/3 Sat	10/4 Sun	10/5 Mon	10/6 Tue	10/7 Wed	
Edit Schedule	8:45	8:45	:00	:00	:00	8:45	8:45	8:00	8:00	:00	:00	8:00	8:00	8:00	Save
Schedule	7:30	7:30	:00	:00	7:30	7:30	7:30	7:30	7:30	:00	:00	7:30	7:30	7:30	Schedule

Notice that the hours for Week 1 on the static employee page on the timesheet are now reflecting 35 and Week 2 are reflecting 40. This still meets the required 75 hours per pay period for the employee so this schedule is allowed.

Employee Information *Press Escape key to close*			
Employee Name:	JOHN J ADAMO	Vacation Leave Date:	7/19/2012
Employee ID:	N01871989	IPP Anniversary Dates:	
Employee Email:	USBJJA@LABOR.NY.GOV	VRWS Percent:	0
Personal Leave Date:	7/19/2012	Clock User:	No
Employee Percent:	100	Week 1 Normal Hours:	35:00
Timesheet Validation:	Schedules	Hours Per Day:	7:30
AWS:	No	Comp Over 40:	No
Week 2 Normal Hours:	40:00	Item Number:	6036
OT Eligible:	Yes	Salary Grade:	6
HOP:	No	Location:	ALBANY
Title:	OFFICE ASSISTANT 1	Division Code:	017-UNEMPLOYMENT INSURANCE
Negotiating Unit:	CSEA-2	Section ID:	UI RECORDS SECTION
Agency Code:	14020-NYS Department of Labor	TDS By Percent:	No
Bureau Code:	190-UI RECORDS SECTION	BiWeekly Total:	No
TDS required:	Yes	Eligible To Use Vacation:	Yes
Schedule Rotation:	SYSTEM GENERATED	Allow Vacation Balance Excess:	No
Holiday Waiver:	No	Former Reservist:	No
TA Eligible:	Yes	Veteran:	No

Close

Further notice that the Profile and main Admin User page still shows Week 1= 37.50 hours and Week 2 = 37.50 hours.

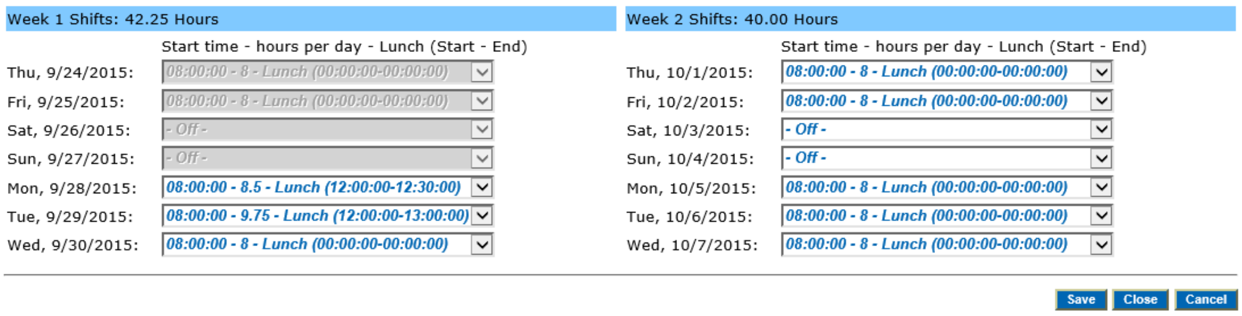
Employee Daily Shift Selection

LATS has the ability to allow employees to select their daily shift schedule from a pre-defined list of available shifts for selection. There are two settings that need to be enabled for this functionality to work correctly: Timesheet>EnableEditSchedule and Timesheet>ShiftType.

When these configuration settings are configured properly the employee will see an additional link on the blue menu ribbon on their timesheet.

Audit Summary Profile Copy Delete Notes Print Print All Notifications Edit Schedule

Clicking the Edit Schedule Link will bring up a pop up window that allows the employee to select daily shifts. *Note, it is assumed that employees have prior approval from their supervisor.*



An email is sent to the supervisor after the employee makes the appropriate schedule changes and clicks the save button.

Schedule saved successfully - Supervisor has been notified

Alternate Work Schedules (AWS)

LATS allows employees to manage alternate schedules. AWS is an employee attribute that is set on the employee's admin record Accruals tab. AWS allows employees to work long days and short days as long as they work the required number of hours expected per week, if overtime eligible.

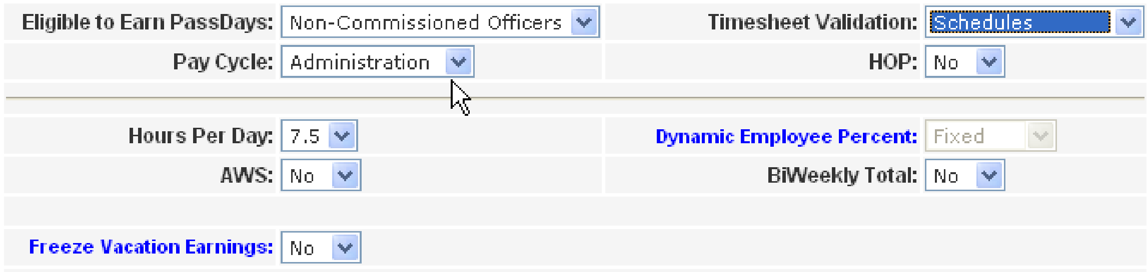
LATS also allows AWS schedule flexibility for overtime ineligible employees. For these employees the following settings must be configured on the employee's admin Accruals tab.

- Overtime Eligible – unchecked
- AWS - checked
- Bi-weekly total - checked

Compressed Work Schedules

The compressed work schedule will enforce daily totals and with the exception of holidays, ignore the hours per day selected on the employee profile. There is much more flexibility with utilizing this functionality but it also requires strict and timely maintenance. When the timesheet validation is set to *Schedules* you can no longer modify pass days on the employee main record or the timesheet profile. You must maintain these changes via that Emp Rotation page on the employee record or through the Emp Rotation tab in the Scheduling module.

As stated, with the Timesheet validation dropdown set to Schedules, the Week 1 and Week 2 Pass day check boxes are hidden. This is because the timesheet is driven by the rotation schedule and the pass days observed in the timesheet are reflected in the rotation assigned to the employee.


Eligible to Earn PassDays:
Non-Commissioned Officers
Timesheet Validation:
Schedules
Pay Cycle:
Administration
HOP:
No
Hours Per Day:
7.5
Dynamic Employee Percent:
Fixed
AWS:
No
BiWeekly Total:
No
Freeze Vacation Earnings:
No

Chapter 19: 8.5.8 Enhancements

Below are the enhancements that are now available in the 8.5.8 Release:

1. LATS Schedule Module now includes the ability to assign agencies to Lunch Shifts, Shifts and Rotations.

2. LATS now allows the Zero Hour hourly timesheets to be processed and sent over to HCM. This will help with the reconciliation on the HCM side and clean up the Hourly Transmit page in LATS so the zero hour timesheets no longer sit in the que without any way to clean them out.

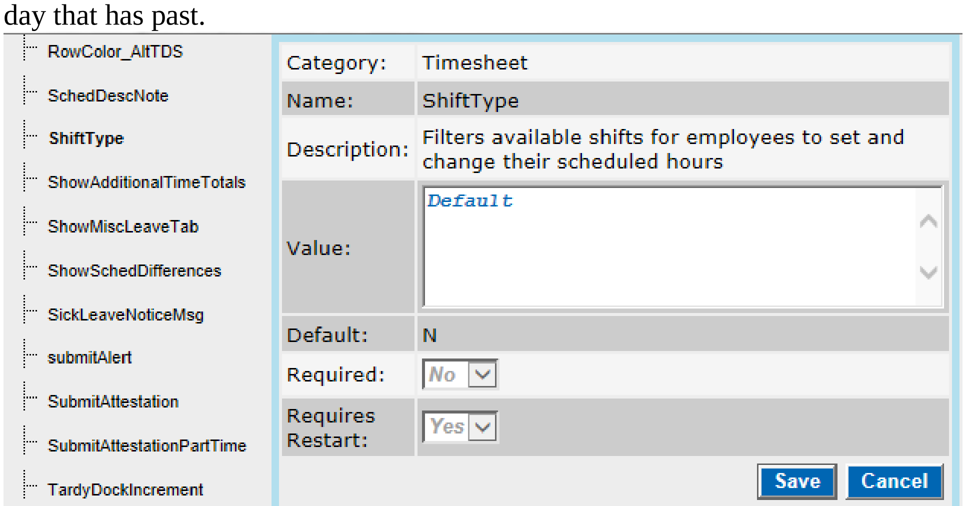
3. LATS now allows use of non-comp time the day after it was earned. CMA added a new config setting 'EnableEarnedNCNextDayUse' to accommodate this request.

4. LATS now has a canned report scheduler available to allow agencies to schedule canned reports to run based on business need.

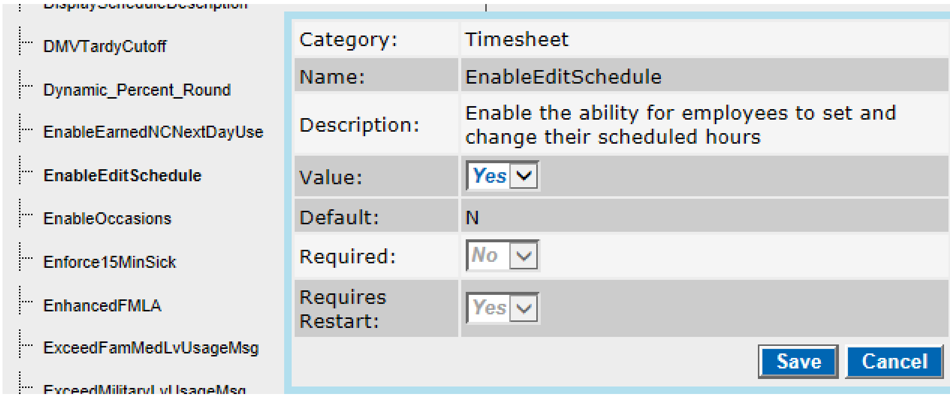
5. LATS now has the ability for employees to set and change their scheduled hours (start and end times) Employees will select the schedule shift (including lunch length, if applicable) from a pre-defined list of shifts. When the schedule is saved, an email will be sent to the supervisor notifying them of the shift change. As part of the business process, the employee should have received approval to make the schedule change in advance from their supervisor.

Employees can change the schedule for one or more future days in the current two week pay period. Those changes will roll over into the next pay period and can also be changed in that pay period.

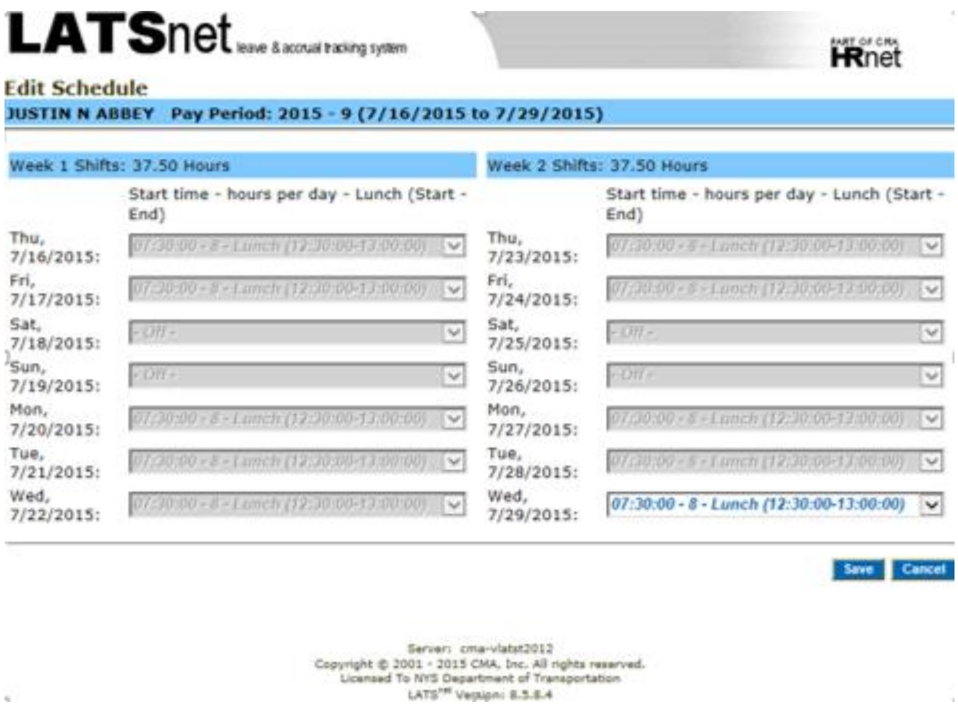
A schedule rotation is two weeks in LATS; changing the scheduled times is limited to the two week rotation. The new rotation becomes the employee's template for the next pay period and all future pay periods until it is changed again. Employees will not be able to change the scheduled hours for a day that has past.



This config. setting identifies the shift types that will appear in the dropdown on the employee's timesheet. For example, Default, 7/8, Qtr. Round, etc. Only one shift type is allowed in this config. setting.

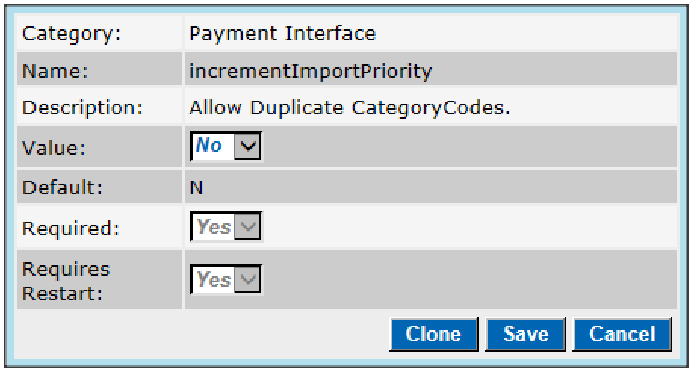


Turning this configuration setting ON (Yes), will display the edit schedule link on the employee timesheet (blue menu ribbon).



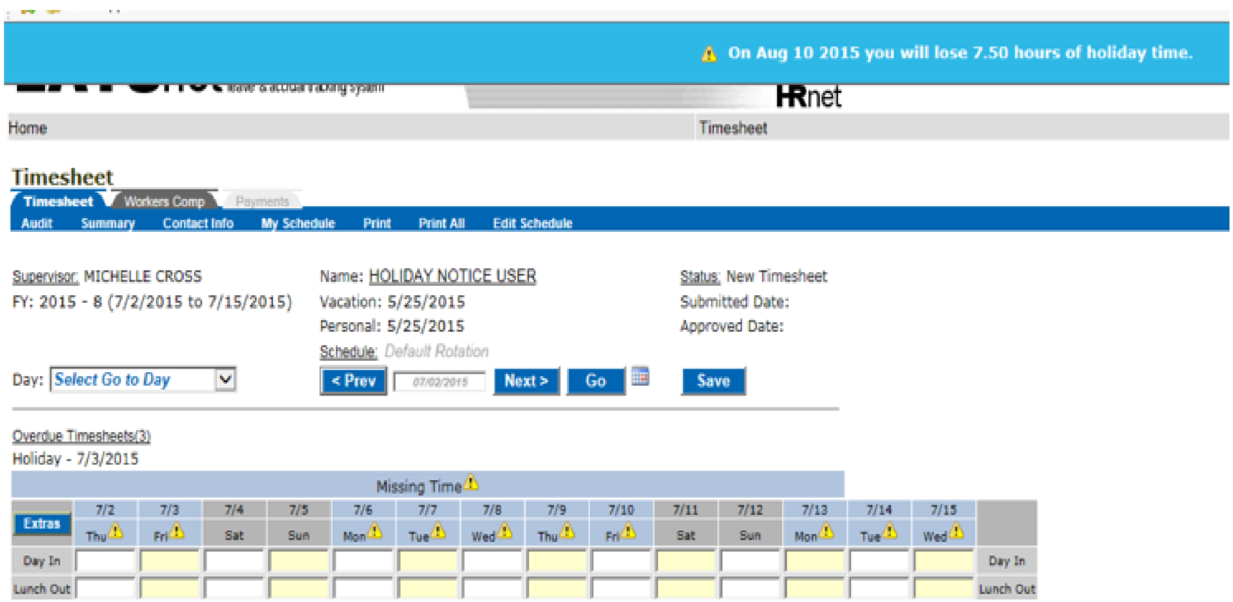
6. CMA Payment Interface - HCM - configurable to not decrement the employee priority for file generated for HCM (OT #969)

This enhancement affects customers that utilize the LATS to HCM payment interface, not the LATS to HRIS payment interface. CMA modified the payment interfaces to only decrement the priority if the (*IncrementImportPriority*) configuration setting exists and is set to 'Y'. Customers who need the priority incremented on import and decremented when creating payment files will need to have the setting changed from the default of 'N'.

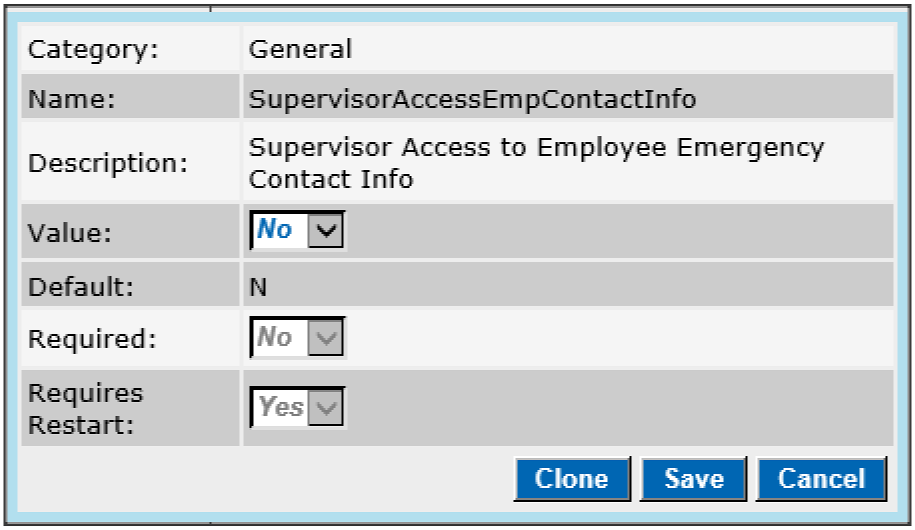


7. Include Holiday Expiration in Notifications

Holiday time that is about to expire will now appear in the notification banner on the timesheet.

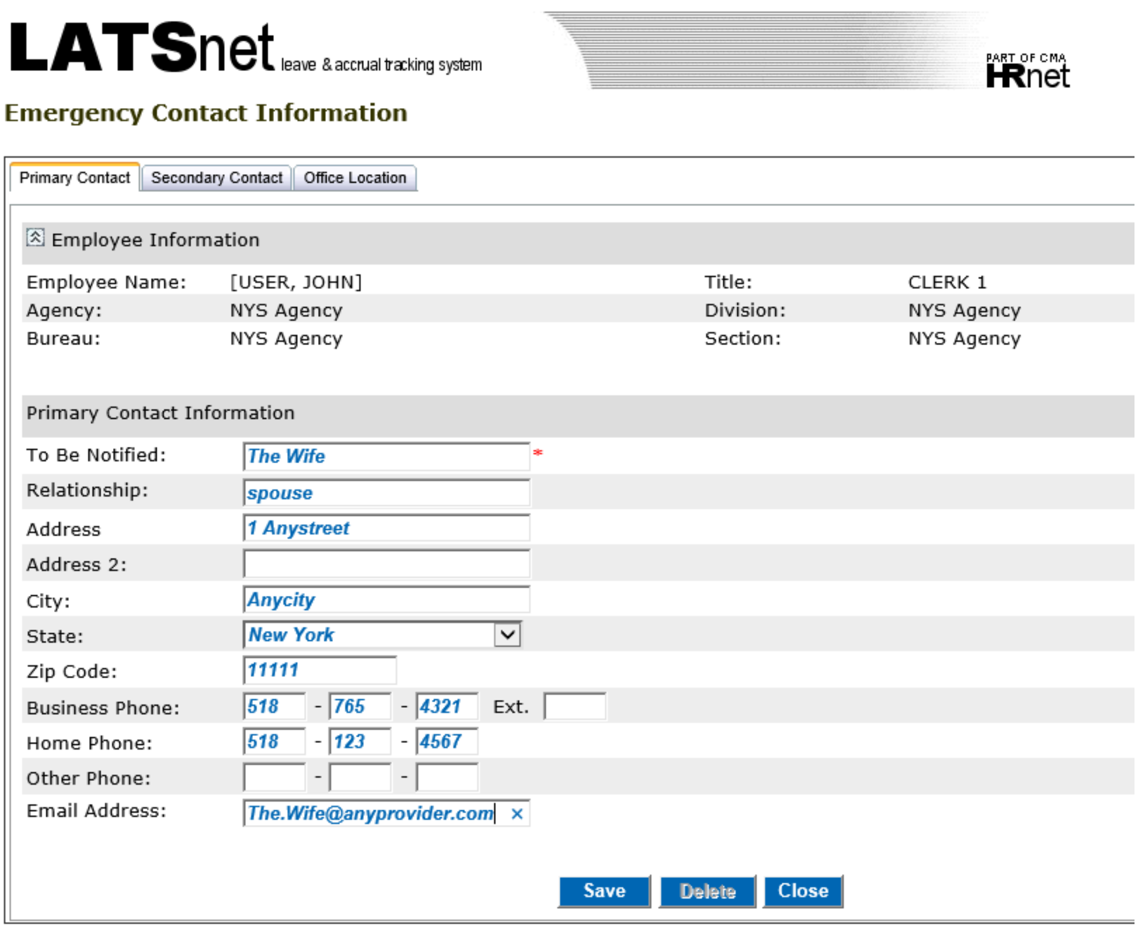


8. LATS now has a configuration setting, (***SupervisorAccessEmpContactInfo***) that when enabled allows supervisors and alternates to access the Emergency Contact Information via the Contact Info link on the timesheet. Supervisors and alternates have read-only access to the Primary Emergency Contact, Secondary Emergency Contact and Office Location information.



Category:	General
Name:	SupervisorAccessEmpContactInfo
Description:	Supervisor Access to Employee Emergency Contact Info
Value:	No
Default:	N
Required:	No
Requires Restart:	Yes

Clone Save Cancel



LATSnet leave & accrual tracking system
PART OF CMA HRnet

Emergency Contact Information

Primary Contact | Secondary Contact | Office Location

Employee Information

Employee Name:	[USER, JOHN]	Title:	CLERK 1
Agency:	NYS Agency	Division:	NYS Agency
Bureau:	NYS Agency	Section:	NYS Agency

Primary Contact Information

To Be Notified:	The Wife *
Relationship:	spouse
Address	1 Anystreet
Address 2:	
City:	Anycity
State:	New York
Zip Code:	11111
Business Phone:	518 - 765 - 4321 Ext.
Home Phone:	518 - 123 - 4567
Other Phone:	- -
Email Address:	The.Wife@anyprovider.com

Save Delete Close