UTHSCSA designed the Leave Accounting and Time Collection Web pages to assist users in entering leave and time. Departments will use the Leave Accounting web pages to enter leave hours for vacation, sick, personal and sick leave pool. Departments will use the Time Collection web pages to enter time worked by employees in their department. Both are web applications that use UTHSCSA’s DRS (Document Review System) and PeopleSoft to collect and maintain leave/work for employees.

The processes we will review are:
- Review the DRS System
- Review the Leave Accounting web page
- Enter vacation, sick, personal, and sick leave pool hours taken
- Review the Leave Accounting Approval page
- Submit leave for approval
- Review the Time Collection web page
- Enter hours worked for hourly employees
- Enter overtime hours worked for hourly/salaried employees
- Review the Time Collection Approval page
- Submit timesheets for approval

Upon completion of this topic you will be able to access the DRS system to enter time and leave for an employee by:
- Entering leave taken in Leave Accounting
- Entering hours worked in Time Collection
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  - REVIEW FOR APPROVAL .................................................................................................... 11
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Document Review System

The Document Review System allows users to submit and approve documents via the web. Users can access the DRS at http://adminweb.uthscsa.edu/drs/default.htm. You may also launch DRS from inside the HSC portal or the DCATS Website.

You must launch the Document Review System from Microsoft Internet Explorer. This Software will not operate using Netscape.

Access must first be granted by your departmental ACE. You must also have a domain user name and password to log onto the UTHSCSA domain. Please see your departmental ACE for this request to be submitted.

The following prompt will be displayed.

- Enter uthscsa\ (Back Slash) then your **Domain username**. It should look exactly like the snapshot above.
- Enter your uthscsa domain NT **Password**. It is case sensitive.
- Click **OK**. The Document Review System Welcome page will be displayed.
Welcome to the Document Review System at UTHSCSA.

This system allows authorized users to submit and approve documents in the course of business here at the University.

Click on the link below to start your user session. Please note that a new browser window will be launched with all menus and toolbars disabled for security reasons. When you are done, simply use your mouse to click the "X" in the upper right hand corner of the window. This page will stay open and active in your current browser session.

Note: Should you need assistance, please call DCATS at 567-7777 Option 5.

Once you have completed your work, you may exit this browser session.

- Click on the START THE DOCUMENT REVIEW SYSTEM button to launch the Document Review System. The DRS Home page will be displayed.
Welcome to the UTHSCSA Document Review System!

To use this system, click on one of the large menu items to reveal its submenu. Make your selection from the submenu.

If you have any questions or comments concerning the use of this system, please call DCATS at 210-567-7777 Option 5.

Reminder, use of this system is intended only for the use by employees and other authorized users of the University of Texas Health Science Center at San Antonio. Use by any other individual is prohibited.

You are currently working on behalf of:

Castillo Jr., Rogelio S

- **User** field displays the current user’s name.

- The **Working on behalf of:** field will display the name of a user who has delegated approval to the current user.

- The **Document Review** section displays links to submitted/pending documents.
  - **Pending Documents** will display all documents that are pending.
  - **User Submitted Docs** will display all documents the user has submitted. The preparer will only be able to see their own documents.
  - **All User Documents** will display all documents for which the current user was either a preparer or approver.

- The **Document Submission** section displays links for creating or updating documents.
  - **On-line Forms** will display available forms for submitting through DRS.

- The **User Options** section displays links to other options.
  - **Edit Delegates** will display a form that allows the Approver to delegate their responsibilities to someone who acts in their absence.

- The **Administration** section displays a link that will show a report of all users with access in their department. This is only accessible by the user in the Approver role.
Leave Accounting – Preparer Role
Data Entry

- Click on the **ON-LINE FORMS** link to display the users’ list of available on-line forms. This list will vary depending on the access your department ACE has requested for you.
- Click on **Leave Accounting Input Form** link to display the Leave Accounting web page.
This page is used to enter leave (vacation, sick, personal, and pool) hours for all employees in a department. All employees should be listed on this page for the selected department.

**Department** displays the department the preparer has access to enter Leave Accounting for.

**Employee Name** displays the employee’s name and EmplID.

**Vacation**
- **Taken** displays the vacation hours taken for this time period.
- **Adjust** displays the vacation hours adjusted for this time period.

**Sick**
- **Taken** displays the sick hours taken for this time period.
- **Adjust** displays the sick hours adjusted for this time period.

**Personal**
- **Taken** displays the personal hours taken for this time period.
- **Adjust** displays the personal hours adjusted for this time period.

**Pool**
- **Taken** displays the sick leave pool hours taken for this time period.
- **Adjust** displays the sick leave pool hours adjusted for this time period.
Click on the Employee's Name to display the Leave Reporting Log and the Update frame for that employee.

Leave Reporting Log

**Begin** displays the beginning balance for the leave type.

**Accrual** displays the accrual rate for the leave type.

**Taken** displays the hours taken for this time period.

**Adjust** displays the hours adjusted for this time period.

**YTD** displays the YTD total for the leave type.

**Update Frame**

- Enter number of vacation hours used/taken in **Vacation Taken**.
- Enter number of vacation hours to be adjusted in **Vacation Adjusted**.
- Enter number of sick leave hours used/taken in **Sick Taken**.
- Enter number of sick leave hours to be adjusted in **Sick Adjusted**.
- Enter number of personal hours used/taken in **Personal Taken**.
- Enter number of personal hours to be adjusted in **Personal Adjusted**.
- Enter number of sick leave pool hours used/taken in **Pool Taken**.
- Enter number of sick leave pool hours to be adjusted in **Pool Adjusted**.
A maximum of **39 hours** can be entered in the adjusted columns by the department. If more than 39 hours need to be adjusted, contact Human Resources. The number entered is positive by default, to decrease adjusted hours, enter a minus (-) sign in front of the hours entered.

- Click **SAVE** to save the employee’s leave record. Repeat the steps above for each employee until all hours have been entered for all departmental employees.

- Click **REVIEW FOR APPROVAL** button to review the leave entry for the department.

**Note:** After the leave has been submitted for approval, the following informational message will be displayed on the Leave Accounting page above the entry area.
Leave Accounting – Preparer Role
Review for Approval

This page is used for the preparer to review the leave entry for a department and to submit the leave for approval. It contains the same information as the Leave Accounting page, but multiple employees are displayed on each page. To correct hours entered before sending for approval, right click and select BACK. To print a copy, right click and select PRINT.

Employee Name displays the employee’s name and EmplID.

Vacation
- **Taken** displays the vacation hours taken for this time period.
- **Adjust** displays the vacation hours adjusted for this time period.

Sick
- **Taken** displays the sick hours taken for this time period.
- **Adjust** displays the sick hours adjusted for this time period.

Personal
- **Taken** displays the personal hours taken for this time period.
- **Adjust** displays the personal hours adjusted for this time period.

Pool
- **Taken** displays the sick leave pool hours taken for this time period.
- **Adjust** displays the sick leave pool hours adjusted for this time period.

Scroll to the bottom of the page and Click **SUBMIT FOR APPROVAL** button to submit the leave entry for the department. The Department Approval Employee Confirmation page is displayed and email is sent to the Approver.
After submitting for approval, the Preparer will no longer have access to update the leave accounting report. If a correction needs to be made, the Approver can disapprove the report. The disapprove action releases the leave records back to the Preparer.
Leave Accounting – Approval Role

The individual who is set up as the preparer’s departmental approver will receive an email within outlook.

*Please note this email is not needed to complete the approval process. This notification is simply a reminder. Also proxy approvers will not receive this email notification. Please see page 16 to approve as a proxy.

The Approver will logon to the Document Review System page, click on the PENDING DOCUMENTS link to display the Pending Documents page.

The Document No. is assigned by the system when the Preparer submits the leave accounting report.

Preparer displays the person who submitted the document.

Subject displays the department and a brief description of the document.

• Click on the Document LVE No. link to view the leave accounting report.
Leave Accounting – Approval Role
Approve on Behalf Of

The proxy for the primary Approver will logon to the Document Review System page using their domain username and password. Click on the drop down arrow in the Approve on behalf of: and select the primary Approver’s name.

- Click on the PENDING DOCUMENTS link to display the Pending Documents page.
- Click on the Document No. LVE link... to review the leave report.
This page displays the Leave Accounting entry for each employee in a department. The format is similar to the Leave Accounting Review page. The Approver cannot edit the data submitted by the Preparer, the Approver either approves or disapproves the leave report. If a correction is necessary, the Approver will disapprove the report. The disapprove action releases the leave records back to the Preparer. A comment box allows the Approver to add notes concerning the leave accounting. There is an 80 character limit for this comment box. E-mail is sent to the Preparer to notify them of the Approver’s action.

**Note:** The leave accounting report must be submitted monthly in order for the employee’s rate to accrue regardless of whether the department has hours to report or not. Once the Approve/Disapprove button is clicked by the Approver, you cannot undo the action. For assistance call the DCATS Office at 210(567-7777 option 5).
**Employee Name** displays the employee's name.

**Employee ID** displays the EmplID.

**Vacation**
- **Taken** displays the vacation hours taken for this time period.
- **Adjusted** displays the vacation hours adjusted for this time period.

**Sick**
- **Taken** displays the sick hours taken for this time period.
- **Adjusted** displays the sick hours adjusted for this time period.

**Personal**
- **Taken** displays the personal hours taken for this time period.
- **Adjusted** displays the personal hours adjusted for this time period.

**Pool**
- **Taken** displays the sick leave pool hours taken for this time period.
- **Adjusted** displays the sick leave pool hours adjusted for this time period.

The **Comments** field allows the Approver to submit comments.

- Click the **APPROVE/DISAPPROVE** button to approve/disapprove the leave report to Human Resources.
Leave Accounting Report

You can view a listing which shows leave accounting history for all employees in the department. Click on the REPORT button on the top upper right-hand corner.

• To print the report, right click on the listing and select PRINT.

• To view a year of history of a particular employee, click on the employee name. This report can also be printed.

Twelve Month Employee Leave History Report

Name: Attrics, Gerald (0000515)  Press CTRL-P to Print Report

<table>
<thead>
<tr>
<th>Month Ending: 11/30/2000</th>
<th>Months of State Service: 0</th>
<th>100 % Time</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Begin</td>
<td>Annual</td>
</tr>
<tr>
<td>Vacation</td>
<td>120</td>
<td>10</td>
</tr>
<tr>
<td>Sick</td>
<td>235</td>
<td>5</td>
</tr>
<tr>
<td>Personal</td>
<td>24</td>
<td>0</td>
</tr>
<tr>
<td>Pool</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
Time Collection – Preparer Role
Data Entry

- Click on the **ON-LINE FORMS** link to display the user's list of available on-line forms. This list will vary depending on the access your departmental ACE has requested for you.

- Click on the **Time Collection Input Form** link to display the time collection form.
This page is used to enter regular and overtime hours worked for hourly employees, as well as overtime hours for salary employees approved for overtime. The names of salaried employees listed in Time Collection are from the Authorized Overtime file. This memo is turned in at the beginning of the year to the departmental Chairman, who approves it then forwards it to the Payroll department for entering.

Only one employee’s information is displayed per page. To print a single page of each employee, right click and select PRINT.

Employee displays the selected Employee’s Name, EmplID, and Empl Rcd. Use the drop down arrow to select another employee.

Pay Period Ending displays the ending date for time entry.

Earn Code displays the Earn Code. (OTS, OTP, REG)
Account Code displays the funding account code. To change the account code for overtime payment you must submit an email to pay admin:

pay-admin@exchange.uthscsa.edu.

To change the account code for regular payment you must correct the information on the employees’ position in the PeopleSoft HCM system.

- Enter the regular work hours for hourly employees with a REG earn code in the Regular Hours field.
- Enter the overtime hours for hourly or salaried employees with the appropriate earn code in the Overtime Hours field.

Earn Code Descriptions:

- OTS (overtime straight pay)
- OTP (overtime premium pay, time and a half)
- REG (regular pay)

Totals fields display the total amount of Regular and Overtime hours entered.

- Click the SAVE EMPLOYEE DATA button to save the time entry for this employee. This prompt will be displayed.

![Image of Microsoft Internet Explorer dialog box]

- Click OK to save the change. The next employee’s record in the Department will automatically be displayed. Repeat the above steps until time has been entered for all employees.
- Click the REVIEW FOR APPROVAL button to review the time entry for the department before submitting it for approval.

**Note:** After the time has been submitted for approval, the following informational message will be displayed on the Time Collection page above the entry area.

Employee Records for this time period have been submitted for approval and cannot be edited.
This page is used for the preparer to review the time entry for a department and to submit the time for approval. It contains the same information as the Time Collection page, but multiple employees are displayed on each page. To correct hours entered before sending for approval, right click and select BACK. To print a copy, right click and select PRINT.

**Employee Name** displays the employee’s name and EmplID.

**FLSA Status** displays the employee’s FLSA status (T=exempt, N=non-exempt).

**Earn Code** displays the earn code (OTS, OTR, REG) used to pay the employee.

**Account Code** displays the account code used to pay the employee.

**Percent Effort** displays the percent effort for the REG earnings.

**Regular Hours (hourly)** displays the number of regular hours entered.

**Overtime Hours** displays the number of hours entered for non-regular pay.

**Totals** display a total for the regular hours and the overtime hours.

![Departmental Time Collection Table]

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee Name:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Atkinson, Gerald</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2000608)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Earn Code</strong></td>
<td><strong>Account Code</strong></td>
<td><strong>Percent Effort</strong></td>
</tr>
<tr>
<td>OTS</td>
<td>ETR0117</td>
<td>0</td>
</tr>
<tr>
<td><strong>TOTALS:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Employee Name:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caucasian, Pat E.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2003111)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Earn Code</strong></td>
<td><strong>Account Code</strong></td>
<td><strong>Percent Effort</strong></td>
</tr>
<tr>
<td>OTS</td>
<td>ETR0117</td>
<td>0</td>
</tr>
<tr>
<td>REG</td>
<td>ETR0117</td>
<td>100</td>
</tr>
<tr>
<td><strong>TOTALS:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Employee Name:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coley, Robin J.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2002112)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Earn Code</strong></td>
<td><strong>Account Code</strong></td>
<td><strong>Percent Effort</strong></td>
</tr>
<tr>
<td>OTS</td>
<td>ETR0117</td>
<td>0</td>
</tr>
<tr>
<td>REG</td>
<td>ETR0117</td>
<td>100</td>
</tr>
<tr>
<td><strong>TOTALS:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Employee Name:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lehigh, Sarah</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2008410)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>** Earn Code**</td>
<td><strong>Account Code</strong></td>
<td><strong>Percent Effort</strong></td>
</tr>
<tr>
<td>OTS</td>
<td>ETR0117</td>
<td>0</td>
</tr>
<tr>
<td>REG</td>
<td>ETR0117</td>
<td>100</td>
</tr>
<tr>
<td><strong>TOTALS:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Employee Name:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Smith, Jane</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2005091)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Earn Code</strong></td>
<td><strong>Account Code</strong></td>
<td><strong>Percent Effort</strong></td>
</tr>
<tr>
<td>OTS</td>
<td>ETR0117</td>
<td>0</td>
</tr>
<tr>
<td><strong>TOTALS:</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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Click the **SUBMIT FOR APPROVAL** button to submit the time entry for approval. The Department Approval Employee Confirmation page is displayed and e-mail is automatically sent to the Approver.

After submitting for approval, the Preparer will no longer have access to update the time collection report. If a correction needs to be made, the Approver can disapprove the report. The disapprove action releases the time sheet back to the Preparer.
Time Collection – Approval Role

The individual who is set up as the preparer's departmental approver will receive an email within outlook.

*Please note this email is not needed to complete the approval process. This notification is simply a reminder. Also proxy approvers will not receive this email notification. Please see page 27 to approve as a proxy.

The Approver will logon to the Document Review System page, click on the PENDING DOCUMENTS link to display the Pending Documents page.
The **Document No.** is assigned by the system when the Preparer submits the time collection report.

- **Preparer** displays the person who prepared and submitted the document.
- **Subject** displays the department and a brief description of the document.
- Click on the **Document No. TCP** link... to review the time collection report.
Time Collection – Approval Role
Approve on Behalf Of

The proxy for the primary Approver will logon to the Document Review System using their domain username and password. Click on the drop down arrow in the Approve on behalf of: and select the primary Approver’s name.

- Click on the PENDING DOCUMENTS link to display the Pending Documents page.

- Click on the Document No. TCP link... to review the time collection report.
This page displays a timesheet for employees in a department. The format is similar to the Time Collection Review page. The Approver cannot edit the data submitted by the Preparer, the Approver either approves or disapproves the time collection report. If a correction is necessary, the Approver will disapprove the report. The disapprove action releases the time collection records back to the Preparer. A comment box allows the Approver to add notes concerning the time collection. There is an 80 character limit for this comment box. E-mail is sent to the Preparer to notify them of the Approvers’ action.

Note: Once the Approve/Disapprove button is clicked by the Approver, you cannot undo the action. For assistance call the DCATS Office at 210(567-7777 option 5).

- **Employee Name** displays the employee’s name and EmplID.
- **FLSA Status** displays the employee’s FLSA status (T=exempt, N= non-exempt).
- **Earn Code** displays the earn code (OTS, OTR, REG) used to pay the employee.
- **Account Code** displays the account code used to pay the employee.
- **Percent Effort** displays the percent effort for the REG earnings.
- **Regular Hours (hourly)** displays the number of regular hours entered.
- **Overtime Hours** displays the number of hours entered for non-regular pay.
- **Totals** display a total for the regular hours and the overtime hours.

- Click the **APPROVE/DISAPPROVE** button to approve/disapprove and submit the time collection to Payroll.