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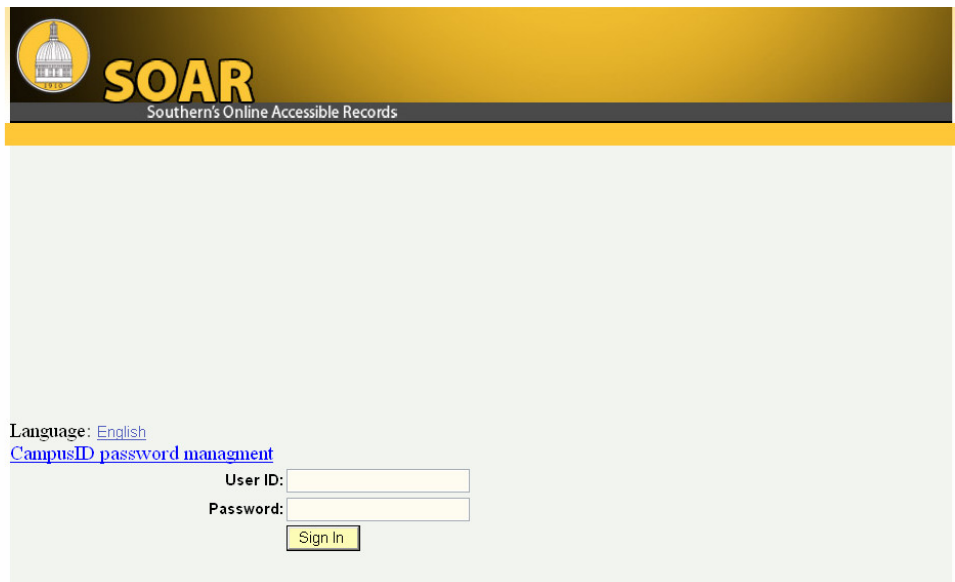
MONTHLY TIME AND ATTENDANCE - MANAGER

Log into SOAR

Procedures for how to Log into SOAR

To log in:

- Simply start Internet Explorer.
- From the Southern Miss Home Page (<http://www.usm.edu>) pull down the Quick Links, and click on SOAR.
- Click on the link titled SOAR LOGIN.
- Enter your User ID and Password. Your user id is the letter “W” plus your 6 digit Employee ID. Example: W123456.



Language: [English](#)
[CampusID password management](#)

User ID:
Password:

Click the button.

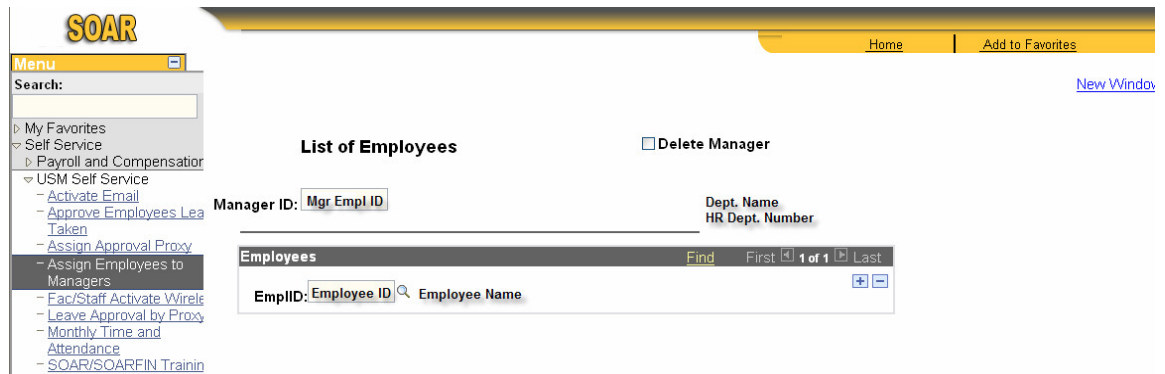
Assign Employees to Managers



Create a List of Active Employees


This process is only used for managers of monthly paid employees who are responsible for reporting personal/vacation and/or sick time taken each month. For employees to have access to input their leave taken, the manager must first assign employees to their Active Employee List. This is done by navigating to the following path once you've logged into SOAR.

Self Service > USM Self Service > Assign Employees to Managers

Once there, the manager will be prompted to enter an EmplID for one employee (note: enter EmplID *without* a W before it). After the EmplID is entered, tab out of that field and the employee's name and department information will appear unless they are not eligible for these leave plans. If they are not eligible an error will appear indicating such. (See "What to do when... : section.) Hourly employees do not report vacation and sick time through this process; therefore they can not be entered into this list.



To enter information for additional employees press the button with the plus sign  to add another row. Continue adding one row for each monthly employee. To delete a row, click on the minus  sign.

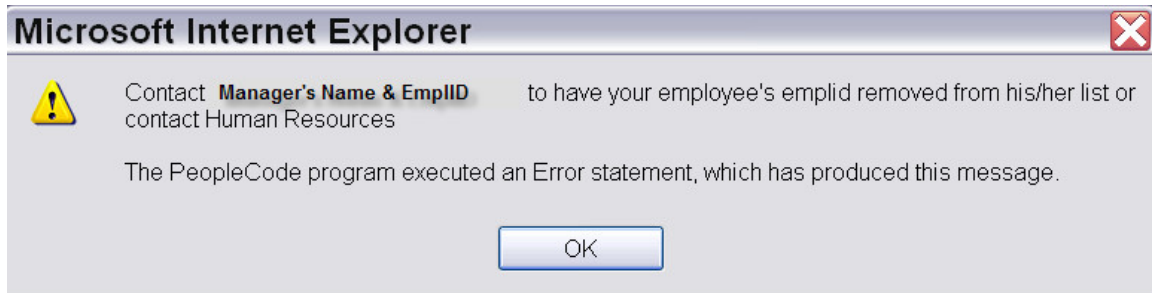
Click on the Save button  before exiting this page or the data will be lost. Once completed, the employees that were entered have access to enter their leave taken.

NOTE: A search can be performed if the EmplID is not known by clicking on the magnifying glass icon.

Do not forget to click the save button so data is not lost.

What to do when...

You have entered an employee id number, and get this message:



What the message is telling you –

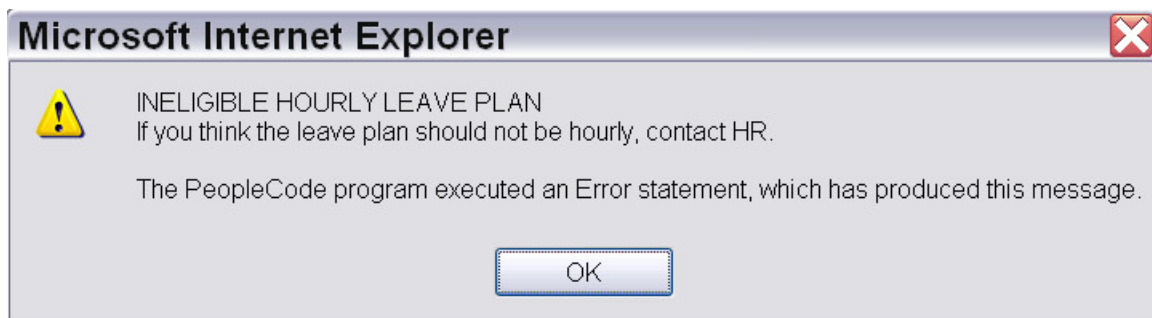
- You have entered the id# of someone already assigned to another manager

1 – You need to verify the correct EmplID# has been entered.

2 – If correct, contact the manager indicated in the message to coordinate whose list the employee should be placed on.

3 – If the manager is no longer at USM, contact Human Resources (HR) and ask for employee to be removed from indicated manager's list.

You have entered an employee id number, and get this message:



What the message is telling you –

- You have entered the id# of someone who is not currently enrolled in a monthly leave plan

1 – You need to verify the correct EmplID# has been entered.

2 – If correct, contact HR to research why the employee is not enrolled in appropriate plan. If you suspect it is merely a timing issue (i.e., employee's

recently moved from bi-weekly to monthly, and possibility that leave plan has not been changed in HR exists), then try again later, before contacting HR.

Enter Monthly Time and Attendance

** Applies to all monthly leave eligible employees

Record Personal Leave (Vacation) and Sick (Medical) Leave Taken

This process will explain how monthly paid employees should enter leave taken for the month similar to what was previously done manually on the Monthly Attendance and Leave Record (a.k.a. ‘red & white sheet’). Note: Leave taken will continue to be entered in full-hour increments.

- Employees will have access to enter time by the 1st of each month. (The leave record for January will be available by January 1st for entering the leave taken during the month of January.)
- Employees will have until the 10th of the following month to complete the leave record. (The leave record for January must be completed by February 10th.)
- Managers will have until the 15th of the following month to complete approvals. (The leave record for January must be approved by February 15th.) See the section titled “Approve Employees Leave Taken”.

If an employee does not enter time, or if the time is not approved by the 15th of the following month, there will be a delay in processing. For instance, if an employee’s time for January is not entered and approved before the automatic process runs on (approx.) February 20th to calculate the leave balances that will appear on the February paycheck, that leave taken will be included in the run for the next month.

Once a manager approves an employee’s time, it can no longer be updated by the employee. However, if the manager unchecks the approval box, then the employee can make changes. Once the changes are made, the manager will then have to go back through the approval process.

After the automatic leave accrual process runs, neither the manager nor the employee can make any changes. The employee would need to contact HR to make adjustments if needed.

Navigate to the following path to enter leave taken information.

Self Service > USM Self Service > Monthly Time and Attendance

This search page can be used to find all available data, only data for a specific month and/or calendar year, or it can also be used to find approved vs. not approved data. The drop down does list all 12 calendar months, however future months are not available to enter time. Historical data is available for review.

SOAR Home

Menu

Search:

My Favorites
Self Service
Payroll and Compensation
USM Self Service
- Activate Email
- Approve Employees Leave Taken
- Assign Approval Proxy
- Assign Employees to Managers
- Fac/Staff Activate Wireles:
- Leave Approval by Proxy
- Monthly Time and Attendance
- SOAR/SOARFIN Training
- Super Users
Workforce Administration
Benefits
Payroll for North America

Monthly Time and Attendance
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Month: begins with [] []
EmpID: begins with [] []
Calendar Year: = [] []
Approved: = [] []

Search Clear Basic Search Save Search Criteria

Find an Existing Value | Add a New Value

Typically the employee will indicate which specific month and year they wish to enter. If more than one month meets the criteria entered, that information will be assessable via a hyperlink as shown below. Otherwise it will open to the month entered.

SOAR Home

Menu

Search:

My Favorites
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- Activate Email
- Approve Employees Leave Taken
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- Assign Employees to Managers
- Fac/Staff Activate Wireles:
- Leave Approval by Proxy
- Monthly Time and Attendance
- SOAR/SOARFIN Training
- Super Users
Workforce Administration
Benefits
Payroll for North America
Organizational Development
Campus Community
Student Admissions
Records and Enrollment
Curriculum Management
Student Financials
Set Up HRMS
Set Up SACR
Reporting Tools
People Tools
USM Utilities

Monthly Time and Attendance
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Month: begins with [] []
EmpID: begins with [] []
Calendar Year: = [] 2007 []
Approved: = [] []

Search Clear Basic Search Save Search Criteria


Search Results
View All First 1-12 of 12 Last

Month	Calendar Year	Approved
01	2007	Yes
02	2007	Yes
03	2007	Yes
04	2007	Yes
05	2007	Yes
06	2007	Yes
07	2007	Yes
08	2007	Yes
09	2007	Yes
10	2007	Yes
11	2007	Yes
12	2007	Yes

Find an Existing Value | Add a New Value

Once a month is selected, an employee will see the following screen, which is then used to enter leave time taken on.

The screenshot shows the SOAR web application interface. On the left is a navigation menu with categories like 'My Favorites', 'Workforce Administration', and 'Benefits'. The main content area is titled 'The University of Southern Mississippi MONTHLY ATTENDANCE AND LEAVE RECORD' for the month of May 2008. It includes fields for 'Name: Employee's Name', 'EmplID: Employee's ID#', 'Department: Employee's Home Dept.', and 'Manager ID: Mgr. ID# and Name'. A note states: 'For 12 Month Employees only - The first (8) hours of illness are reported as personal (VAC) leave, except for recurring illness.' Below this, it shows 'Hours Available as 04/30/2008 of Personal Leave (VAC) Balance: Available VAC hrs' and 'Sick Leave (SCK) Balance: Available SCK hrs'. A section for 'Enter leave time in no more than 40 hour increments.' contains a 'No Leave Taken' checkbox and a 'Leave' table with columns for 'From', 'To', 'Hours', 'Date', 'Plan', and 'Type'. Summary statistics show 'Total Hours Taken this Month' with 'Total Personal (VAC) Hours: 0' and 'Total Sick (SCK) Hours: 0'. There are also sections for 'Managers Approval Section' (with an 'Approved' checkbox) and 'Process Information' (with a 'Processed' checkbox and 'Process Date' field). At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'.

There are variables on how an employee should enter time, but the employee must always save their time using the Save button  before it is recorded in the system. The only codes that have to be reported are Personal (Vacation) and Sick (Medical).

If no leave was taken for Personal or Sick the employee must select the “No Leave Taken” option to indicate to the manager and HR that this month was not skipped or forgotten. Otherwise the employees name will show up on reports as not having entered their time for that month.

Available leave balances are shown on this page as well. This leave balance does NOT include the hours taken for the month showing. It only reflects hours that were reported, approved and processed before the leave accrual process ran for the date indicated, as well as the hours earned as of the available date.

Guidelines and Scenarios for Entering Leave Taken

<p>Consecutive Personal or Sick Time</p>	<p>Consecutive time taken in your normal work week (usually Monday through Friday) should be entered on one line per plan type. Personal (vacation) and sick leave will be entered on separate lines regardless of when they were taken.</p>
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A whole 40 hour week (Monday through Friday) of personal time taken would be entered as shown:

Leave				Find	First	1 of 1	Last
*From	04/07/2008	Monday	*To	04/11/2008	Friday	*Hours	40
Date:			Date:			Taken:	
*Plan	51	VAC					
Type:							Personal Leave

Total Hours Taken this Month

Total Personal (VAC) Hours: 40
 Total Sick (SCK) Hours: 0

Keeping in mind the policy for sick leave that the first 8 hours of a non-reoccurring illness must be reported as Personal (VAC), a week of sick leave taken would be entered as shown:

Leave				Find	First	1-2 of 2	Last
*From	04/07/2008	Monday	*To	04/07/2008	Monday	*Hours	8
Date:			Date:			Taken:	
*Plan	51	VAC					
Type:							Personal Leave
*From	04/08/2008	Tuesday	*To	04/11/2008	Friday	*Hours	32
Date:			Date:			Taken:	
*Plan	50	SICK					
Type:							Medical Leave

Total Hours Taken this Month

Total Personal (VAC) Hours: 8
 Total Sick (SCK) Hours: 32

Non-Consecutive Time Non-consecutive time taken in a Monday through Friday week should be entered on separate lines.

An employee who took personal leave on Monday and Thursday would enter time as shown:

Leave		Find	First	1-2 of 2	Last
*From	04/07/2008 Monday	*To	04/07/2008 Monday	*Hours	8
Date:		Date:		Taken:	
*Plan	51 VAC				
Type:	Personal Leave				
*From	04/10/2008 Thursday	*To	04/10/2008 Thursday	*Hours	8
Date:		Date:		Taken:	
*Plan	51 VAC				
Type:	Personal Leave				

Total Hours Taken this Month

Total Personal (VAC) Hours: 16
 Total Sick (SCK) Hours: 0

A 12-month employee who was out for personal on Monday, and was out sick on Thursday and Friday would record as follows:

Leave		Find	First	1-3 of 3	Last
*From	04/07/2008 Monday	*To	04/07/2008 Monday	*Hours	8
Date:		Date:		Taken:	
*Plan	51 VAC				
Type:	Personal Leave				
*From	04/10/2008 Thursday	*To	04/10/2008 Thursday	*Hours	8
Date:		Date:		Taken:	
*Plan	51 VAC				
Type:	Personal Leave				
*From	04/11/2008 Friday	*To	04/11/2008 Friday	*Hours	8
Date:		Date:		Taken:	
*Plan	50 SICK				
Type:	Medical Leave				

Total Hours Taken this Month

Total Personal (VAC) Hours: 16
 Total Sick (SCK) Hours: 8

A 12-month employee who took the following:

8 hour vacation time 4/7/2008

2 hour vacation time 4/9/2008

16 hours total (2 days sick time = 8 personal + 8 sick) 4/15 through 4/16/2008

16 hours (2 days) vacation time 4/22 through 4/23/2008

Would enter the following:

Leave		Find	First	1-5 of 5	Last
*From	04/07/2008 Monday	*To	04/07/2008 Monday	*Hours	8
Date:		Date:		Taken:	
*Plan	51 VAC				
Type:	Personal Leave				
*From	04/09/2008 Wednesday	*To	04/09/2008 Wednesday	*Hours	2
Date:		Date:		Taken:	
*Plan	51 VAC				
Type:	Personal Leave				
*From	04/15/2008 Tuesday	*To	04/15/2008 Tuesday	*Hours	8
Date:		Date:		Taken:	
*Plan	51 VAC				
Type:	Personal Leave				
*From	04/16/2008 Wednesday	*To	04/16/2008 Wednesday	*Hours	8
Date:		Date:		Taken:	
*Plan	50 SICK				
Type:	Medical Leave				
*From	04/22/2008 Tuesday	*To	04/23/2008 Wednesday	*Hours	16
Date:		Date:		Taken:	
*Plan	51 VAC				
Type:	Personal Leave				

Total Hours Taken this Month

Total Personal (VAC) Hours: 34

Total Sick (SCK) Hours: 8

An employee who takes Thursday through Tuesday off for personal leave will need to input this time on two separate lines – one for each week.

Leave		Find	First	1-2 of 2	Last			
*From	04/24/2008	Thursday	*To	04/25/2008	Friday	*Hours	16	+ -
Date:			Date:			Taken:		
*Plan	51	VAC						
Type:		Personal Leave						
*From	04/28/2008	Monday	*To	04/29/2008	Tuesday	*Hours	16	+ -
Date:			Date:			Taken:		
*Plan	51	VAC						
Type:		Personal Leave						

Total Hours Taken this Month

Total Personal (VAC) Hours: 32

Total Sick (SCK) Hours: 0

Note that the time is calculated under the heading “Total Hours Taken this Month” and will update with each change that is entered.

Approve Employees Leave Taken

Verify Time is Entered, Approve the Leave Taken, and Ensure all are Approved

This section covers how to verify that each employee has entered time, approve the time that each employee has entered and check to make sure all employees time has been approved. Navigate to the “Approve Employees Leave Taken ”search page by using the following path:

Self Service > USM Self Service > Approve Employees Leave Taken

Use the Calendar Year drop down to select the current year and click on the Search **Search** button to view an employee list. More search options can be used to narrow down the amount of data that is retrieved if desired. This view indicates the status of approval and whether time was entered.

Approve Employees Leave Taken
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

EmpID: begins with []
 Manager ID: begins with []
 Calendar Year: = [] 2008 []
 Month: begins with [] []
 Approved: = [] []
 Time Entered: = [] []

Search Clear Basic Search Save Search Criteria

Search Results
View All First 1-5 of 5 Last

EmpID	Mgr. ID	Month	Calendar Year	Approved	Time Entered	Name
EmpID	Mgr. ID	01	2008	Yes	Yes	Employee's Name
EmpID	Mgr. ID	02	2008	Yes	Yes	Employee's Name
EmpID	Mgr. ID	03	2008	Yes	Yes	Employee's Name
EmpID	Mgr. ID	04	2008	No	Yes	Employee's Name
EmpID	Mgr. ID	05	2008	No	No	Employee's Name

In this example, time has been entered for January, February, March and April, but only January, February and March has been approved. The employee must enter time before it can be approved. Once they have done so, the option under “Time Entered” will indicate a “Yes”.

The manager selects the month to review or approve by choosing the appropriate hyperlink for that month. To approve, the manager clicks on the Approved button and clicks on Save. (See following screen.)

SOAR

Home | Add to Favorites

April 2008

Name: EmpID: Manager ID:

Department: _____

For 12 Month Employees only - The first (8) hours of illness are reported as personal (VAC) leave, except for recurring illness.

Hours Available as 04/30/2008

of

Personal Leave (VAC)

Balance:

Sick Leave (SCK) Balance:

Enter leave time in no more than 40 hour increments.

No Leave Taken

Leave	Find	First	1-2 of 2	Last
*From: 04/17/2008 Thursday Date: 04/17/2008 *Plan: 51 VAC Type: Personal Leave	*To: 04/18/2008 Friday Date: 04/18/2008	*Hours: 18	Taken:	
*From: 04/23/2008 Wednesday Date: 04/23/2008 *Plan: 51 VAC Type: Personal Leave	*To: 04/23/2008 Wednesday Date: 04/23/2008	*Hours: 2	Taken:	

Total Hours Taken this Month

Total Personal (VAC) Hours: 18
Total Sick (SCK) Hours: 0

Managers Approval Section

Approved

Process Information

Processed Process Date: _____

View Manager’s Approval and Process Information

Self Service > USM Self Service > Approve Employees Leave Taken

To verify that the manager has approved the time the employee has entered, the employee can go back to the month they wish to verify and look toward the bottom of the page.

If the manager has approved time, the employee can no longer update time for that month, unless the manager unchecks the approval box and saves that change.

Managers Approval Section	
<input type="checkbox"/>	Approved
Process Information	
<input type="checkbox"/>	Processed Process Date:

If the manager has not approved the leave taken in a timely manner the time will not get processed. This can also be checked on the same page.

The Process Information will indicate when the payroll process has been run, thereby locking the time entered so that neither employee nor manager can change. As previously mentioned, any correction to processed data must be requested through HR.

Log out of SOAR

As a security precaution always log out of SOAR so your session will end. Closing the Internet browser does not log you out of the system, it merely closes the browser. To log out correctly, use the ‘Sign Out’ hyperlink at the top right of the page.

The screenshot shows the SOAR web application interface. At the top left is the SOAR logo. Below it is a 'Menu' section with a search bar and a list of navigation options including 'My Favorites', 'Self Service', 'Payroll and Compensation', 'USM Self Service', 'Activate Email', 'Approve Employees Leave Taken', 'Assign Approval Proxy', 'Assign Employees to Managers', 'Fac/Staff Activate Wireless', 'Leave Approval by Proxy', 'Monthly Time and Attendance', 'SOAR/SOARFIN Training', and 'Super Users'. Below the menu are categories like 'Workforce Administration', 'Benefits', 'Payroll for North America', 'Organizational Development', and 'Campus Community'. At the top right, there is a navigation bar with 'Home', 'Add to Favorites', and 'Sign out' (circled in red). Below the navigation bar are links for 'New Window', 'Help', and 'RSS'. The main content area displays 'The University of Southern Mississippi' and 'MONTHLY ATTENDANCE AND LEAVE RECORD' for 'April 2008'. It includes fields for 'Name:', 'EmpID:', 'Department:', and 'Manager ID:'. A note states: 'For 12 Month Employees only - The first (8) hours of illness are reported as personal (VAC) leave, except for recurring illness.' Below this, it shows 'Hours Available as 04/30/2008' and 'of Personal Leave (VAC) Balance:'. It also indicates 'Sick Leave (SCK) Balance:' and a requirement to 'Enter leave time in no more than 40 hour increments.'

Conclusion

The manager is responsible for approving their employee's time in the system. Before they employee can ever enter their time, the manager must have input the employee into their employee list, otherwise the employee will receive an error message indicating that they have not been assigned to a manager.

After the manager has approved time, the employee cannot change that information, without the manager unapproving first, but they can view it.

Once the automatic process is run in Payroll that posts leave earned and taken, neither the manager nor the employee will have access to make changes.

Points to Remember

- This is report leave **taken** only.
- Only the Employee logged into SOAR can enter time for himself/herself –No one can enter leave taken for another employee, not even the employee's manager.
- When assigning employees to manager, no need to enter "W" before employee ID#.
- Good idea to check name that appears after typing empl ID#, when assigning employees to manager, to verify correctness of ID#.
- REMEMBER 8 hr VAC rule for each illness incident (first 8 hours of leave taken for illness is classified as Personal Leave; anytime after 8 hours can be classified as Sick Leave).
- You as Manager have the responsibility to check the correctness of the monthly leave being submitted.
- On Monthly Attendance and Leave Record panel, the calendar used in lookup will display the current month, not necessarily the month for which leave taken is being entered.
- Time should be entered on a weekly basis (normally Monday to Friday), NOT to exceed 40 hours leave taken. This will give you a better history of the actual days/dates an employee takes off.
- Leave taken will continue to be entered in full-hour increments.
- Employees should not click on the "No Leave Taken" flag until the end of the month –how do they know on the 15th that they will not be out due to illness on the 28th?
- Once a month's leave has been processed, any adjustments will need to be done through Human Resources –employee cannot create a second sheet for a month already submitted and processed.
- If you encounter any problems assigning employees or approving time, send an email to Payroll@usm.edu and someone from either Payroll or HR will respond as soon as possible.