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Supervisor Menu

To access the Supervisor Menu:

1. Log into PTA Web at https://ptaweb.state.wi.us. You may see a message screen indicating that you have adjustments pending and the number *(Figure 1)*. See the Retroactive Adjustments section later in this document for instructions on the retroactive adjustment approval process.

Figure 1

2. If you have supervisor privileges, the ***Supervisor Menu*** link will appear in the left navigation menu *(Figure 2)*.

In the window below the *Supervisor Menu,* you can **select the employee name** you wish to work with.

Click the arrow next to ***Supervisor Menu*** to view a list of the menu items.

In addition to the functions available in the Supervisor Menu, supervisors can also use the ***Employee Menu*** to perform any of the available functions for any of their employees, except for entering the employee's default time schedule.

Following is a summary of the items in the *Supervisor Menu* and their functions.

Figure 2

NOTE: **Do not use your browser's Back button when navigating through PTAWeb. You will be taken out of the application.**

Approve Payroll Times

APPROVE WORK/LEAVE HOURS

To approve the work/leave hours for your assigned employees.

1. From the Supervisor Menu, click on ***Approve Payroll Times***.

   The following screen will display.

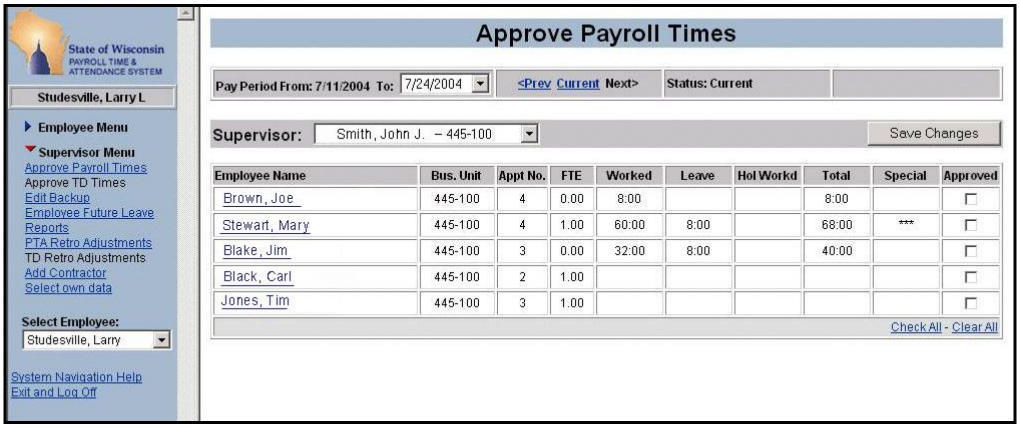


Figure 3

All the work and leave times entered by your assigned employees will be displayed.

2. Use the drop-down box at the top left of the window to select the pay period you wish to view. The current pay period is the default.
3. To approve the times for **all the employees listed**, click ***Check All*** at the bottom of the window. This will place a check in all the boxes in the ***Approved*** column.
4. To approve a **specific employee's** time, click in the box in the ***Approved*** column for the employee.

NOTE: You can uncheck any of the boxes by clicking in the specific box. To clear all the boxes, click ***Clear All***. This will clear the entire column.

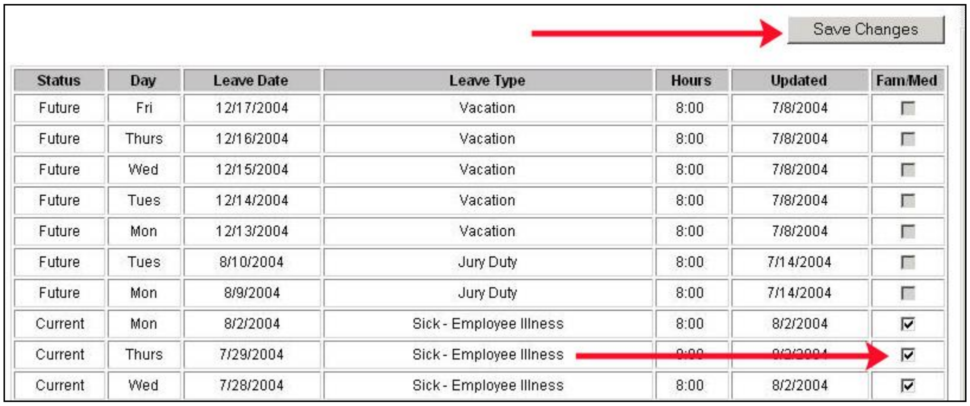
5. Click ***Save Changes*** when you have completed your approvals.

RECORDING FAMILY/MEDICAL LEAVE FOR AN EMPLOYEE

Supervisors have the authority to designate leave hours as ***Family/Medical Leave*** for any of their employees, or any employee for whom they are the assigned back up. *Family/Medical Leave* may be recorded in PTA in two ways:

- If the leave hours have already been entered:
  1. Select the employee for whom you will be making the entries.
  2. In the *Employee Menu*, select ***Leave History***.

     The ***Leave History*** page will open.



Save Changes

Status	Day	Leave Date	Leave Type	Hours	Updated	Fam/Med
Future	Fri	12/17/2004	Vacation	8:00	7/8/2004	☐
Future	Thurs	12/16/2004	Vacation	8:00	7/8/2004	☐
Future	Wed	12/15/2004	Vacation	8:00	7/8/2004	☐
Future	Tues	12/14/2004	Vacation	8:00	7/8/2004	☐
Future	Mon	12/13/2004	Vacation	8:00	7/8/2004	☐
Future	Tues	8/10/2004	Jury Duty	8:00	7/14/2004	☐
Future	Mon	8/9/2004	Jury Duty	8:00	7/14/2004	☐
Current	Mon	8/2/2004	Sick - Employee Illness	8:00	8/2/2004	☑
Current	Thurs	7/29/2004	Sick - Employee Illness	8:00	8/2/2004	☑
Current	Wed	7/28/2004	Sick - Employee Illness	8:00	8/2/2004	☑

Figure 4

3. In the column labeled ***Fam/Med*** click in each box next to the leave that is to be designated as *Family/Medical* leave. A checkmark will be displayed in the box.
4. Click ***Save Changes*** to record the entries.

- If the hours for the employee **have not been entered**. You can record the *Family/Medical* leave designation at the time of entry.
  1. Select the employee for whom you will be making the entries.
  2. In the *Employee Menu*, select ***Enter/Edit Work Times***.

     The *Enter/Edit Work* Times page will open.

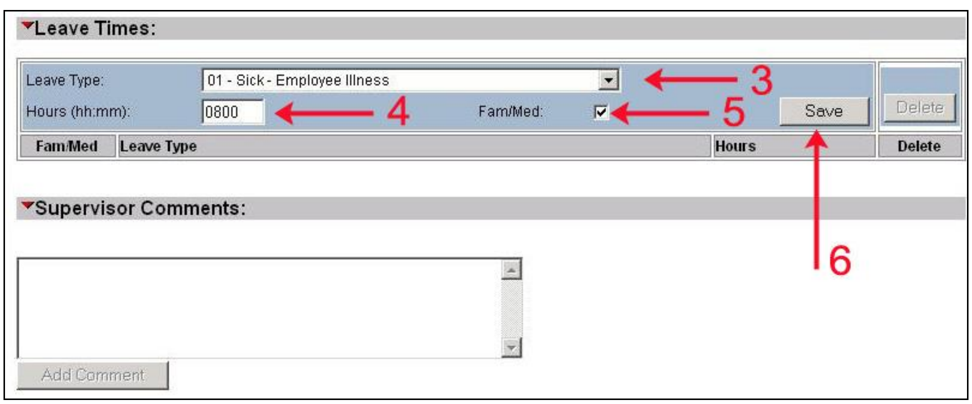


Figure 5

3. Select the ***Leave Type***.
4. In the ***Hours*** window, enter the number of hours.
5. Click in the box labeled ***Fam/Med***. A checkmark will be displayed in the box.
6. Click ***Save*** to record the entry.

7. You may also enter a comment in the ***Supervisor Comments*** box. Comments are not viewable by employees.
8. Click ***Add Comment*** to save the comment.

VIEW EMPLOYEE DETAILS

To view the details for a specific employee, click the employee's name. The following page will display.

Pay Period Daily Hours - Employee's Name

Pay Period From: 7/11/2004 To: 7/24/2004 <Prev Current Next> Status: Current

Day	Date	Work	Leave	Hol Work	Callback	Standby	Prof Time	Other	Diff
Sun	7/25								
Mon	7/26	14:00							X
Tue	7/27	15:30							X
Wed	7/28		8:00						
Thu	7/29		8:00						
Fri	7/30	8:00							
Sat	7/31								
Sun	8/1								
Mon	8/2		8:00						
Tue	8/3								
Wed	8/4								
Thu	8/5								
Fri	8/6								
Sat	8/7								
	TOTAL	37:30	24:00						
	Week 1	37:30	16:00						
	Week 2		8:00						

Default Pay Values:

Overtime: Cash Pay | Work Times: Required | FLSA: Exempt

Hours:

Reported: 61:30
Regular: 48:00
Other:

Cash Pay (hh:mm): 08:30
Comp Time (hh:mm): 05:00
Supervisor Approved
Save Changes

Figure 6

You can select the pay period you wish to view by using the drop-down menu in the upper section of the window.

NOTE: To **return** to the *Approve Payroll Times* page, click ***Approve Payroll Times*** in the Supervisor Menu. **Do not use your browser's back button.**

Clicking on a specific date will take you to the employee's Work and Leave Time screen for that pay period *(Figure 7)*.

Figure 7

Here, you can make any necessary adjustments, just as if you had accessed this screen from the employee menu.

NOTE: You cannot return directly to the employee's *Pay Period Daily Hours* page from here. To access another date for the employee, or another employee, you must click ***Approve Payroll Times*** in the Supervisor Menu. **Do not use your browser's back button.**

Split Cash Pay/Comp Time

If an employee has **overtime** hours, and **will be paid for all hours** reported, you may choose to split the hours between comp time and cash pay on a per-pay-period basis. Regardless of whether the employee's overtime default is set to ***Cash Pay*** or ***Comp Time Earned***, you can make this change without changing the default. This is done on the ***Pay Period Daily Hours*** page *(Figure 6)*.

1. In the example shown in Figure 8, the employee's default is ***Cash Pay***. The ***Cash Pay*** box shows a total of 13 hours and 30 minutes **overtime hours** worked by the employee.

Figure 8

2. Enter into the window for the **other overtime type**, the number of hours you wish to move. In the example shown, five hours of overtime is being switched from the ***Cash Pay*** default to ***Comp Time***. To do this, simply enter the number 5 into the *Comp Time* box *(Figure 9 – Red Arrow)*.

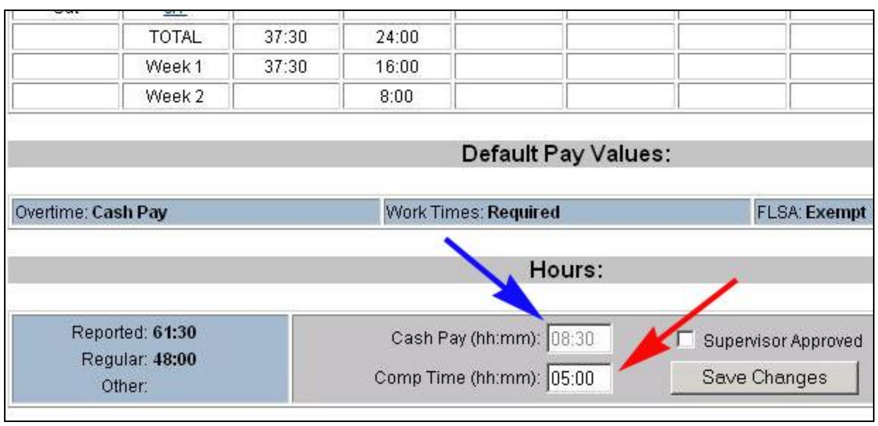


Figure 9

3. Click ***Save Changes.*** The program will automatically recalculate the overtime split based on your entry. The number of hours in the default overtime type will automatically decrease by the same amount entered in the window for the other overtime type. In the example shown, the 5 hours entered into the Comp Time window decreases the amount in the Cash Pay window by 5 (Figure 9 – Blue Arrow). The total remains 13 hours and 30 minutes.

Changes to Employee Profile

Supervisors may make only two changes to an employee’s profile:

- Supervisors may change the employee’s **overtime default** from ***Cash Pay*** to ***Comp Time Earned****.*
- Supervisors may determine if an employee is allowed to use a **default work schedule**.

CHANGING THE OVERTIME DEFAULT

To change an employee’s Overtime Default:

1. In the window below the *Supervisor Menu*, **select the employee name** you wish to work with *(Figure 2)*.
2. In the Employee Menu, click ***Employee Profile***.

   The Employee Profile page will open.

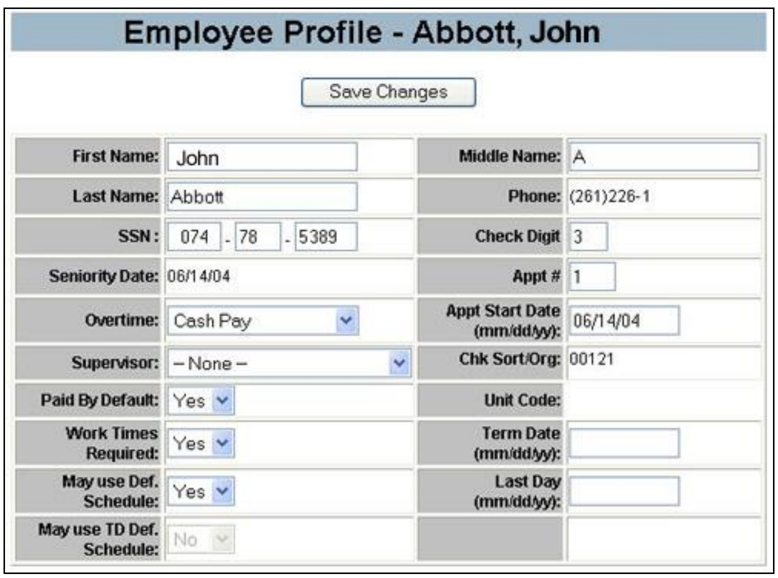


Figure 10

3. Use the drop-down menu next to the ***Overtime*** box *(Figure 11)* to select either ***Cash Pay*** or ***Comp Time Earned***.

Figure 11

4. Click ***Save Changes*** to register your selection.

CHANGING THE DEFAULT WORK SCHEDULE

To select if an employee is allowed to use a default work schedule:

1. In the window below the *Supervisor Menu*, **select the employee name** you wish to work with *(Figure 2)*.
2. In the Employee Menu, click ***Employee Profile***.

   The Employee Profile page will open (Figure 10).
3. Use the drop-down menu next to ***May use Def. Schedule*** to select either ***Yes*** or ***No***. If the selection is ***Yes***, the employee may use a default time schedule, if the selection is ***No***, the employee must manually enter all start and stop times.
4. Click ***Save Changes*** to register your selection.

Edit Backup

SELECT OR CHANGE BACKUP SUPERVISOR

To assign a supervisor to serve as a backup in your absence:

1. Click ***Edit Backup*** in the *Supervisor Menu.*
2. A screen will display showing the name of the current backup supervisor in the blue banner at the top of the screen.

Figure 12

3. To select your backup supervisor, use the drop-down menu to scroll the list of available supervisors.

4. Click the name of the supervisor you want to serve as your backup.

5. Click ***Save Backup*** to register your selection.

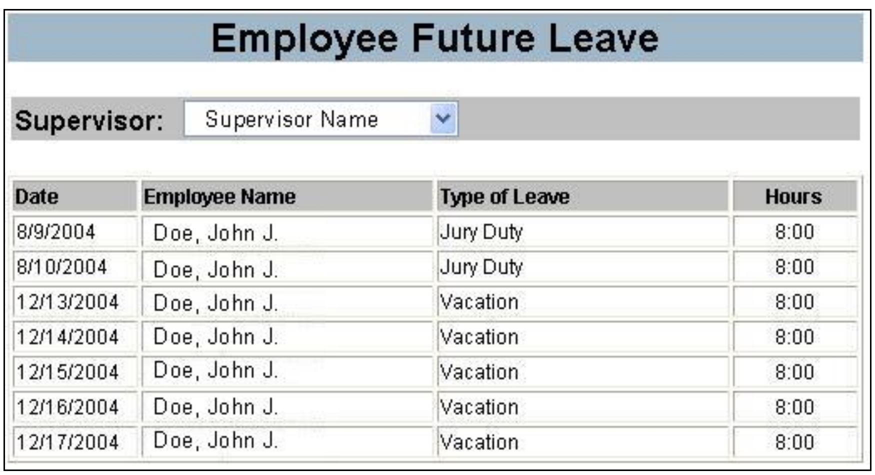
   This will immediately select your backup supervisor, or change one already selected. You may change your backup supervisor at any time.

REMOVE BACKUP

To delete your current backup, click ***Remove Backup***. This will register your backup as ***None***, since no backup supervisor is selected at this point. To assign a new backup supervisor, you will have to select a new backup using the above procedure.

Employee Future Leave

Allows you to view future leave entered in PTAWeb by both your assigned employees and those for whom you are serving as a backup supervisor.



Employee Future Leave

Supervisor: Supervisor Name

Date	Employee Name	Type of Leave	Hours
8/9/2004	Doe, John J.	Jury Duty	8:00
8/10/2004	Doe, John J.	Jury Duty	8:00
12/13/2004	Doe, John J.	Vacation	8:00
12/14/2004	Doe, John J.	Vacation	8:00
12/15/2004	Doe, John J.	Vacation	8:00
12/16/2004	Doe, John J.	Vacation	8:00
12/17/2004	Doe, John J.	Vacation	8:00

Figure 13

Reports

To view any reports available to supervisors:

1. Click ***Reports*** in the Supervisor Menu.

   The following screen will appear:

Figure 14

2. Click the drop-down menu on the left of the screen to view all the reports available to all supervisors.

3. Choose the report you wish to view.

4. Use the drop-down menu on the right of the screen to select yourself as the supervisor, or a supervisor who has designated you as their backup. Employee reports for only the selected supervisor will be displayed. All supervisor reports will show your department’s name in the heading.

Following are the details of each of the separate report screens.

EMPLOYEES PAID BY DEFAULT SCHEDULE

Figure 15

Displays all employees assigned to the selected supervisor whose Employee Profile are set to ***Yes*** for ***Paid by Default***.

Family Leave Used

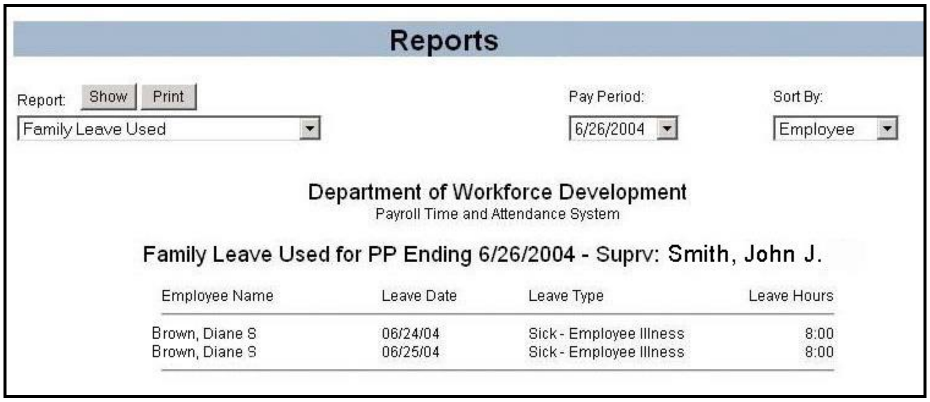


Figure 16

Displays by selected pay period and supervisor, all employees who have leave that has been designated as ***Family/Medical Leave***.

HOURS BEYOND DEFAULT SCHEDULE

Displays by pay period and by supervisor, all employees whose Employee Profile is set to ***Yes*** for ***Paid by Default*** and ***Yes*** for ***Work Times Required***.

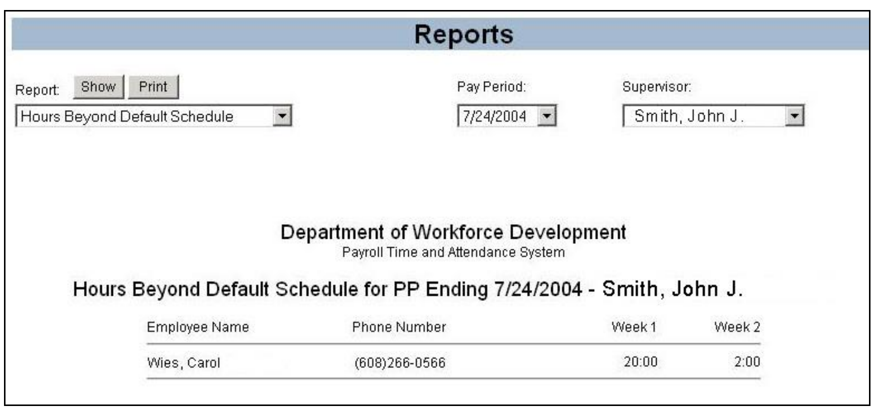


Figure 17

PROFESSIONAL TIME BY PAY PERIOD

Displays hours recorded as ***Professional Time*** for all employees by pay period and supervisor.

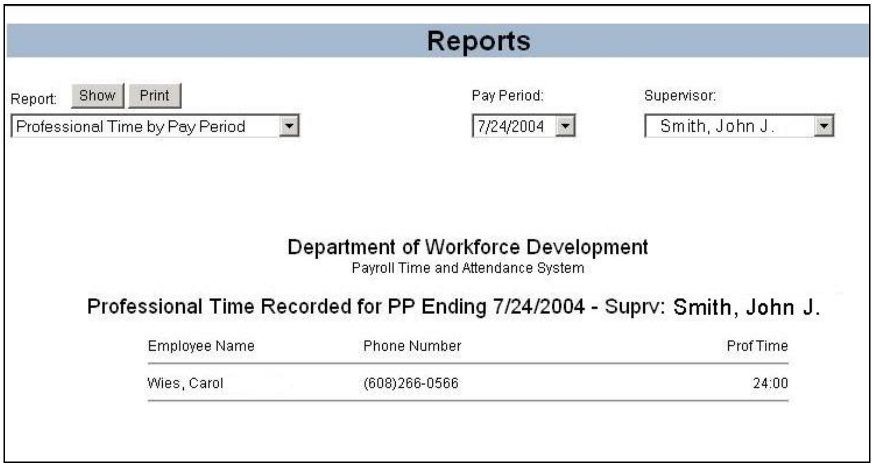


Figure 18

PROFESSIONAL TIME FOR YEAR

Displays total of ***Professional Time*** recorded by employee and calendar year.

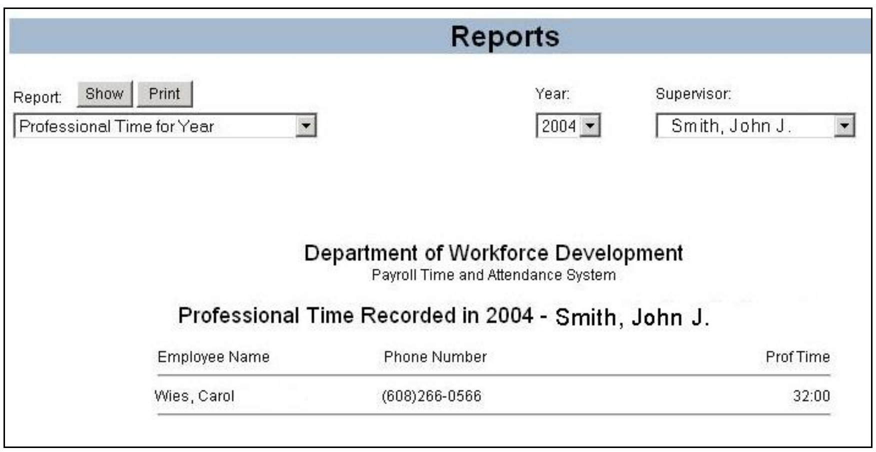


Figure 19

SICK TIME USED

Displays total sick hours per employee, per selected dates. Reports sums by leave type.

Figure 20

FAMILY MEDICAL LEAVE USED

Displays by employee and date range, dates that have been designated as ***Family/Medical Leave***.

Figure 21

LTE TIME REPORTED

Displays total hours recorded by LTEs in their active appointment. Includes all hours entered at the time the report is generated. Only hours entered in PTAWeb are included in this report. Hours reported on an LTE appointment prior to their activation on PTAWeb will not be included.

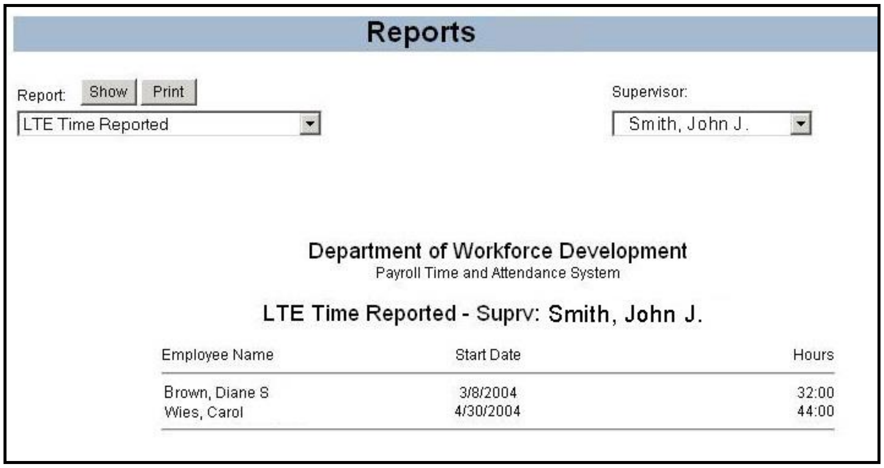


Figure 22

PTA Retroactive Adjustments

Employees may adjust time and leave entries after the close of a pay period. Entries can be made for hours or leave **not entered during the pay period**, or to **correct** hours or leave time already entered. Adjustments that effect pay will be sent with the next pay cycle following the approval of the adjustment.

NOTE: Supervisors can enter retroactive adjustments on behalf of their employees by utilizing the supervisor approval screen for that employee *(Figure 25)*. Enter retroactive adjustments following the same process as documented in the *Employee Guide*.

APPROVING RETROACTIVE ADJUSTMENTS

When an employee enters a retroactive adjustment, the employee’s supervisor must approve the adjustment before the entries can be processed.

1. If you have approvals for retroactive adjustments pending, you will be notified when you first log into PTA Web. Immediately upon logging in, a message screen will be displayed indicating that adjustments have been entered and the number.

Figure 23

Click on ***OK*** to proceed to PTAWeb.

2. To review the retroactive adjustments that have been entered, click ***PTA Retro Adjustments*** in the *Supervisor Menu*. A screen will be displayed that lists all unapproved adjustments made by your staff.

Status	Employee	Appt#	Adjustment Date
Approved	Brown, Joe	2	5/1/2004
Approved	Stewart, Mary	2	6/15/2004
Disapproved	Blake, Jim	4	2/18/2004
Not Yet Approved	Black, Carl	3	6/15/2004

Figure 24

Two drop-down boxes are displayed at the top of the screen.

3. Your name should be displayed as the default in the ***Supervisor*** drop-down menu. If you are acting as a backup for another supervisor, select that supervisor’s name. Pending adjustments entered by that supervisor’s staff will then display.

4. Use the ***View*** drop-down menu to look at either ***Not Yet Approved***, or ***All Unprocessed*** adjustments. *All Unprocessed* adjustments include adjustments that have been approved, but not yet processed by the payroll section.

5. To view an adjustment, click on the employees name in the ***Employee*** column.

   The following screen will appear.

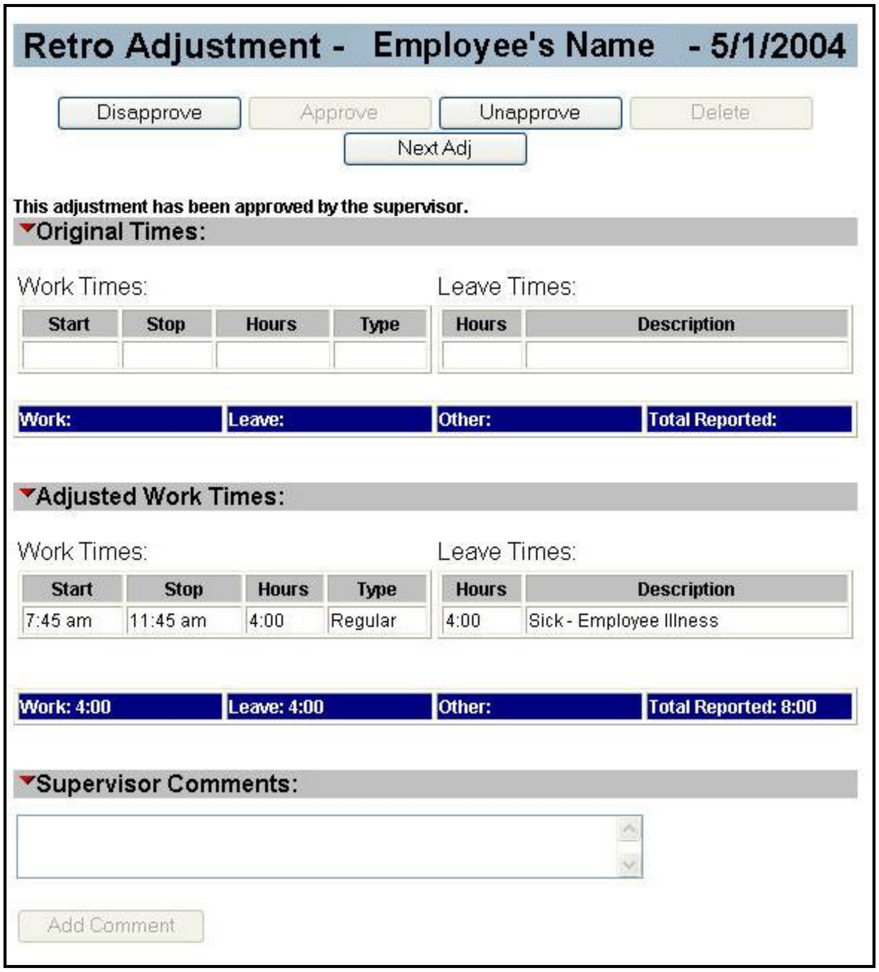


Figure 25

- **Disapprove / Approve** – Use these buttons to either approve or disapprove the retroactive adjustment.
- **Unapprove** – Use this button to reverse an approval that has already been entered for an adjustment.
- **Delete** – Delete the adjustment from the employee's record.
- **Next Adj** – Go to the next adjustment for the employee you are viewing. If that employee has no further adjustments pending, you will be returned to the *Select Retro Adjustment* list *(Figure 24)*.
- **Original Times** – Shows the **original** work and leaves times entered by the employee. The blue bar shows the totals for *Work*, *Leave*, and *Other* hours that were originally entered, and are being adjusted. The *Total Reported* column shows the sum of those entries.

- **Adjusted Work Times** - Shows the **adjusted** work and leaves times entered by the employee. The blue bar shows the totals for *Work*, *Leave*, and *Other* hours being adjusted. The *Total Reported* column shows the sum of those entries.

- **Supervisor Comments** - Allows you to make comments regarding the adjustment.

6. Click either the ***Approve*** or ***Disapprove*** button, depending on the action you wish to take.

7. If you wish to add any comments, enter them in the ***Supervisor Comments*** box at the bottom of the page.

8. When you have completed all the actions for the current employee, click the ***Next Adj*** button to take you to the next adjustment for that employee. When all the adjustments for the employee are completed, you will be returned to the ***Select Retro Adjustment*** screen.

Retroactive adjustments are sent to Central Payroll for processing at the end of each pay period. Any adjustments that effect salary will be reflected on the paycheck for the pay period in which the adjustment was processed.

In the example shown in Figure 26, an adjustment is entered on March 1st for hours that were worked on February 19th (a date in the previous pay period) The adjustment is then reflected on the paycheck the employee receives on March 18 for the period which ended on March 6th. In this case, an additional 4 hours of leave time would be paid on March 18.

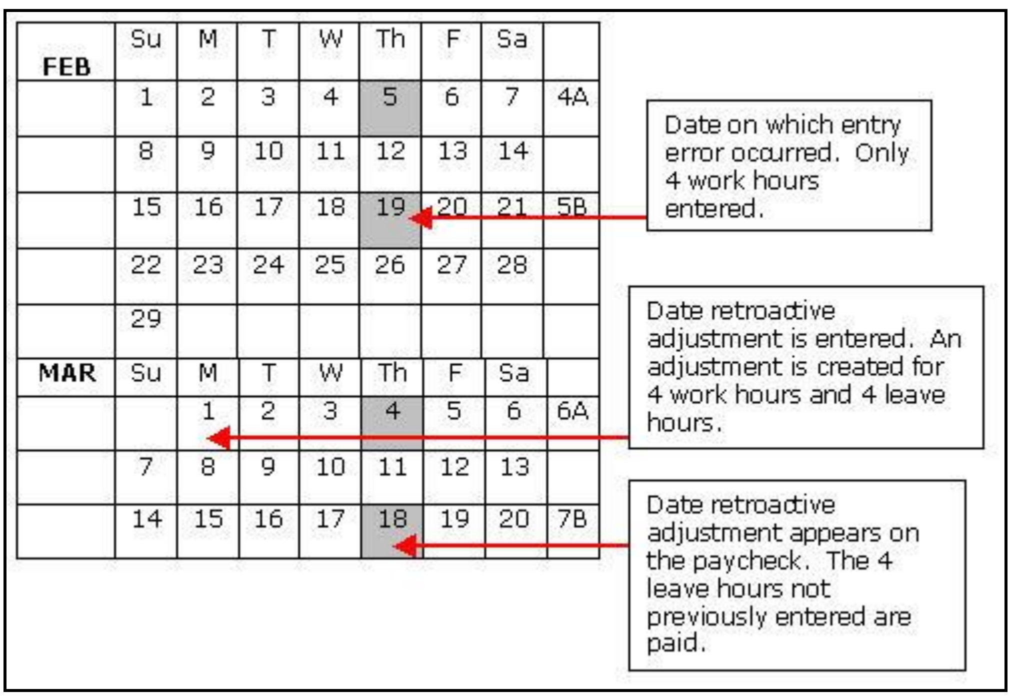


Figure 26

Supervisor Time Distribution (TD) Instructions

GENERAL INFORMATION

- You can approve Time Distribution hours in the same manner as Work/Leave times by selecting the ***Approve TD Time*** option from the Supervisor Menu.
- You will not be able to approve TD times if:
  - You have not already approved the Payroll Time entries for the employee.
  - The **Work** hours and **TD** hours for an employee are not **equal**.
  - There is an error flag set on the employee's record. Only agencies using a validator may have error flags set.
- You may edit the TD times for an employee assigned to you, or to someone for whom you are backup, under the same rules as time edits. See ***Entering Time and Time Distributio*****n** in the ***Employees Guide*** for instructions on editing an employee's TD times.
- You may **not** change/edit an employee's **TD Default Schedule**.
- All employees assigned to a supervisor do not have to be TD Users.
- A supervisor does not have to be a TD user to have employee's who are TD Users.

APPROVE TD HOURS

To approve the TD hours for your assigned employees:

1. From the Supervisor Menu, click on ***Approve TD Times***.

   The following screen will display.

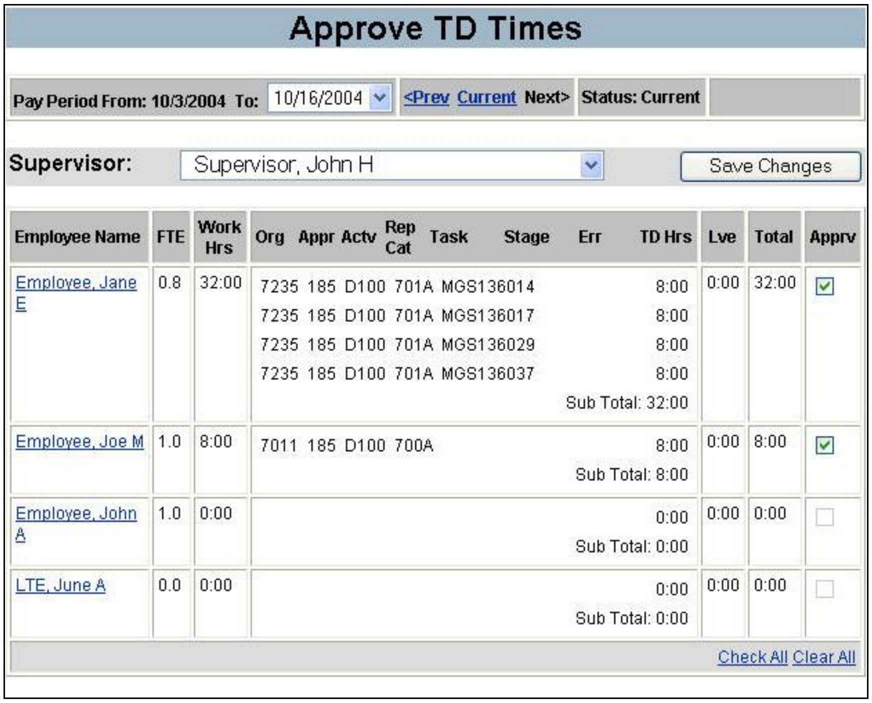


Figure 27

2. Use the drop-down box at the top of the window to select the pay period you wish to view. The current pay period is the default.

   All the TD times entered by your assigned employees will be displayed. If the employee has not entered TD times for the pay period, the employee's name will still be listed but the TD code section will be blank and the total hours will be 0:00.

3. To approve a **specific employee's** time, click the box in the ***Apprv*** column for the employee. A checkmark will appear in the box.

4. To approve TD times for **all the employees listed**, click ***Check All*** at the bottom of the window. This will place a check in all the boxes in the ***Apprv*** column. If the employee has no TD codes entered, the check box will be grayed out and a check will not appear in the box. You can uncheck any of the boxes by clicking in the specific box. To clear all the boxes, click ***Clear All***. This will clear the entire column.

Important:

If you are in the current pay period, you will receive a warning that once you approve the TD times, your employees will not be able to modify TD codes and times for the pay period. Normally, you would not want to approve TD times for the Current pay period.

5. Click ***Save Changes*** to record your approvals.

TD RETRO ADJUSTMENT

If an employee who is a TD user enters a retroactive adjustment that includes work hours, they must also make a retroactive adjustment to enter an equal number of TD hours.

A reminder will be displayed each time a supervisor logs in to PTA if they have a TD Retro Adjustment that is not approved.

Figure 28

The reminder will not disappear until the supervisor has completed the approval or otherwise acted upon the retro adjustment.

To approve TD retroactive adjustments:

1. Select '***TD Retro Adjustment***s' from the Supervisor Menu.

   The following page will appear:

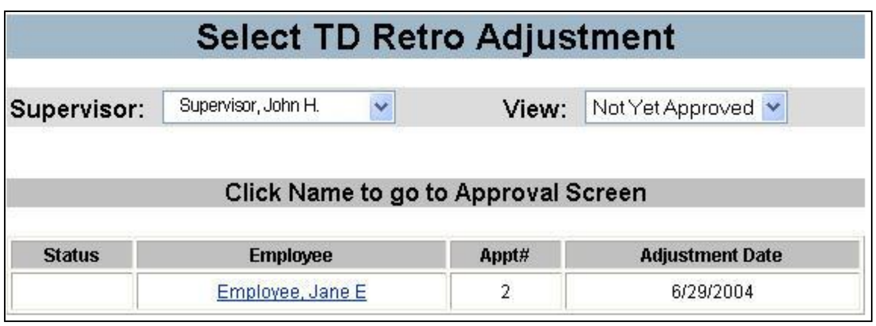


Figure 29

2. Click on the hyperlink for the employee you wish to approve.

   The following screen will appear:

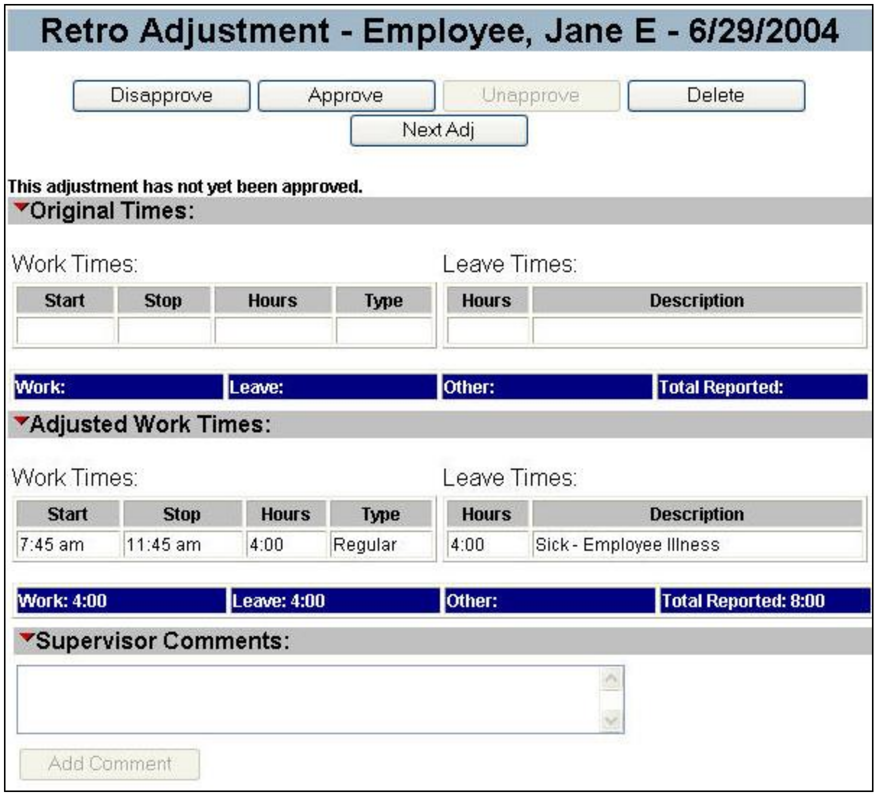


Figure 30

The same rules that apply to approvals for standard entries also apply to approval for retroactive adjustments.

- You cannot approve TD retroactive adjustments that do not match the work hours entered for the employee.
- You must first approve the employee's retroactive time adjustments before you can approve the retro TD adjustments.
- You cannot approve a retro TD adjustment if the there is an error flag set on the TD Retro Adjustment.

3. If the payroll time for the work hours shown on this page have not been approved, the following message will appear near the top of the page:

   The payroll portion of this retroactive adjustment must be approved before the TD portion of this adjustment can be approved.

   If the message does not appear, you may go on to Step 5 to either approve or disapprove the adjustment.

4. If the Payroll Time must be approved first, click PTA ***Retro Adjustments*** in the Supervisor Menu in the left navigation column.

   The Select Retro Adjustment page will open (Figure 24). Follow the instruction for approving Retro Payroll adjustments earlier in this guide and then return to the retro adjustment screen for the employee (Figure 30).

5. Once the Payroll Time for this adjustment has been approved, you can approve or disapprove the adjustment, by clicking ***Approve*** or ***Disapprove*** at the top of the screen. When you click ***Approve***, the ***Unapprove*** button will become active. You can use this button to unapprove the adjustment if necessary.

6. You may add a comment if you wish in the ***Supervisor Comments*** box at the bottom of the screen.

7. Click ***Next Adj*** to complete the process. If there are no more adjustments to approve, a screen will appear with the following message:

   There are No Retro TD Times available for this View

Add Contractor

Allows a supervisor to add a record to PTAWeb for a contractor who is not on the state payroll system. This will allow the contractor to enter work times and appear on the supervisor’s approval screens. This data is for informational purposes only and is not collected by Central Payroll.

Figure 31

1. Enter the contractor’s Social Security Number and click ***OK***.

   The following page will appear.

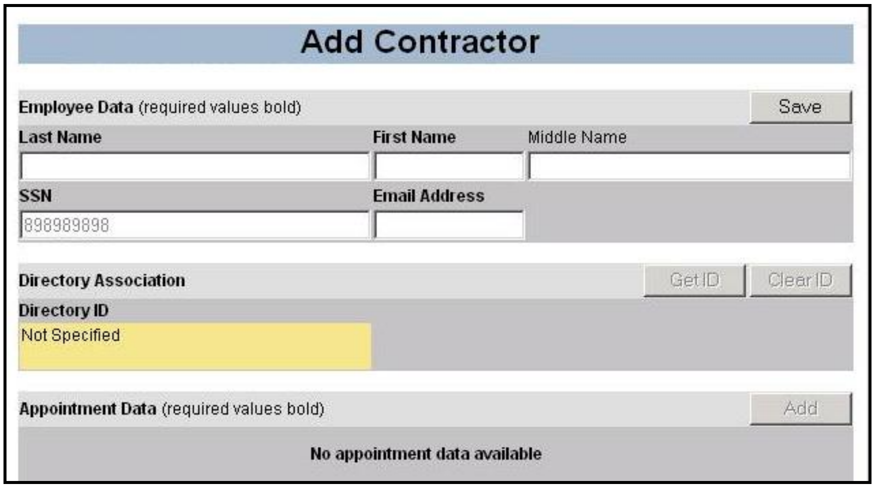


Figure 32

2. Enter the contractor's name and e-mail address and click the ***Save*** button. This will activate the ***Get ID*** button, which you can use to set up the association in the Enterprise Directory.

3. Click the ***Get ID*** button.

   The following window will appear.

   An Enterprise ID assigned to the contractor will appear in the **Ent. ID** column.

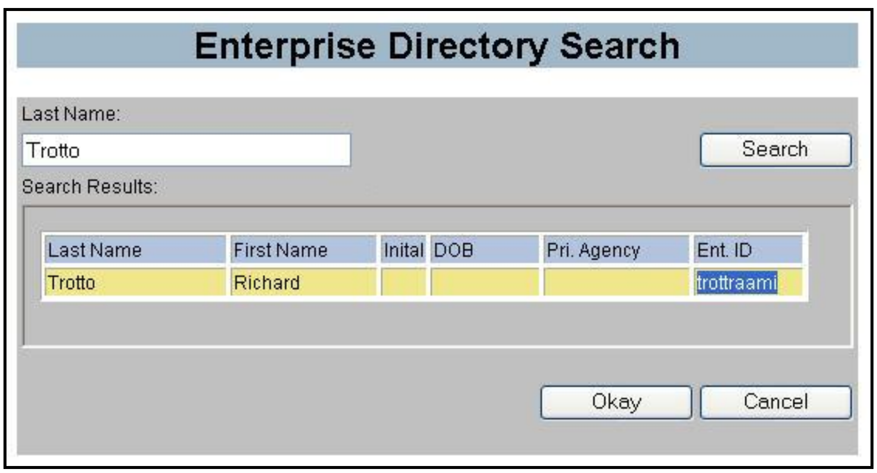


Figure 33

4. Click ***Okay*** to accept the Enterprise ID. You will be returned to the ***Add Contractor*** screen *(Figure 32)*. The contractor's Enterprise ID will appear in the ***Directory ID*** box.

Figure 34

Completing the name and e-mail address fields will also activate the ***Add*** button, which allows you to enter detailed information about the contractor.

5. Click the ***Add*** button. The Appointment Data section will become populated with several data entry fields.

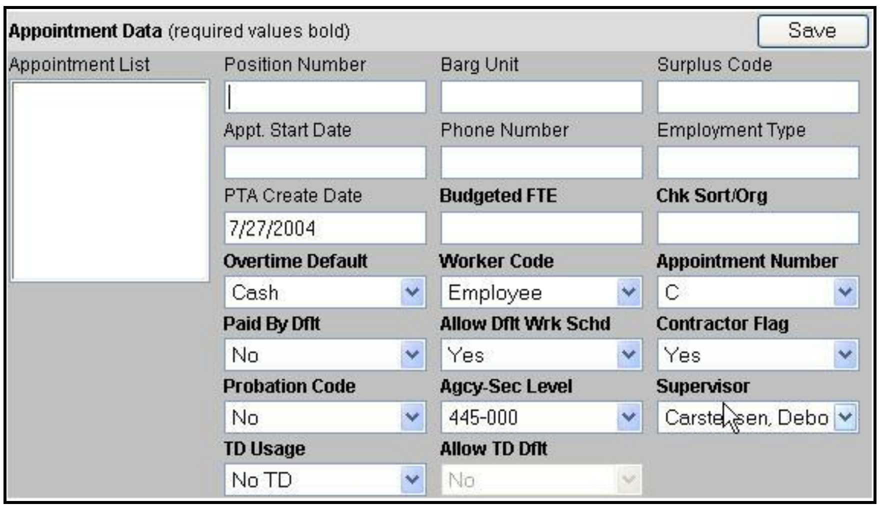


Figure 35

6. You must enter data in all the fields with labels in **bold** type.
   - **Budgeted FTE** – enter a percentage from 1-100 (no % sign is required)
   - **Check Sort/Org** - generally the same as your own.

   The following fields may be edited by using the drop down menus for each as appropriate:
   - **Overtime Default** – Select *Cash* or *Comp Time*
   - **Worker Code** - Select *Employee* or *Supervisor*
   - **Paid by Dflt** – Select *Yes* or *No*
   - **Allow Dflt Wrk Schd** - Select *Yes* or *No*
   - **Probation Code -** Select *Yes* or *No*
   - **Agcy-Sec Level** - Select the appropriate Agency/Section number
   - **TD Usage** – Select either *Task* or *Stage*, neither, or both
   - **Allow TD Dflt** - Select *Yes* or *No*

Note: Since the contractor is not paid by Central Payroll, many of these fields will not be relevant and may be left unchanged from their default status.

The following fields are set automatically and cannot be edited.

- **Supervisor**
- **Appointment Number**
- **Contractor Flag**

Select Own Data

Click ***Select own data*** form the Supervisor Menu to return you to your own record. It is important to select this option before entering work or leave times for yourself to ensure that you are not accidentally updating another employee's data.