HBS Employee Quick-Start Guide



UCSF employees use Huntington Business Systems (HBS) to submit hours and request leave. This guide provides a visual overview of the basic features for all employees, and how to quickly submit timesheets that **do not need to be changed** in any way. Logging into HBS Logging into HBS using MyAccess Login to MyAccess at http://myaccess.ucsf.edu (not shown). Scroll down to locate and select HBS Timekeeping System from the applications menu. If you have set MyAccess to display "Favorites", you may need to change to "All Apps" or search for HBS. Use of the Virtual Private Network (VPN) is required to use HBS outside of the UCSF network. For help with the VPN, go to the UCSF IT VPN page. In the event MyAccess is unavailable, you can use the HBS direct link: https://hbsweb.ucsfmedicalcenter.org/tpweb/. . If you do not yet have a MyAccess account or need more help see the Logging Into HBS job aid for more information. Navigation using the HBS tabs and links From the **Employee Tasks** tab, click the desired Employee Tasks Log Off Messages History Help option to: Enter/edit your Timesheet Leave Requests Change Password Timesheet Balances Enter, edit, or review your Leave Requests Check your leave Balances Change your Password Log Off of HBS when finished working Faculty are paid monthly:



The screen to the left if the default screen for all Monthly Paid Employees

-Faculty only receive vacation so there is no need to enter sick days

-Faculty should request vacation via HBS and with enough notice for clinic staff to reschedule patients and/or find other coverage

-Clinical Faculty should work with their Division Chief if/when they are sick in order to ensure clinical coverage

HBS Employee Quick-Start Guide

ubmitting timesheets <i>without leave or changes to hours</i> Monthly Paid Employees					
					Employee Tasks
Timesheet Le	ave Requests Bal	ances	Change Pas	sword	Cost Center Favorites
	BUF		0.198	3500)
Timesheet Gro Administrator: Customer Sup	up #: 408040-WATA PEL port: (415) 514-410	NAB 0, Option	2 OR create	a help tick	@ucsf.edu et at <u>http://help.ucsf.edu</u>
By pressing the 'OK' button, I certify that I have accurately recorded all hours that I have worked or taken as time off in accordance with UC Policy. I understand that I may be subject to discipline, up to and including termination, if I have misrepresented any information on my timesheet shows over usage of accrued leave, those hours may be considered as unpaid leave and may result in my not being paid for those hours of over usage. Report leave for Jul 2016 3 OK Cancel				tely recorded all dance with UC , up to and formation on my t shows over d as unpaid leave f over usage. Cancel	
Review your timesh	eet for accur	acy			
Click the No leave to	report radio	buttor	ı		
Click the OK button to	certify and s	ubmit	your tim	neshe	et
Monthly employees d	o not report	hours	, only le	ave. I	f you have leave

to report, see the <u>Requesting, Reporting, and Changing Leave in HBS</u> Job Aid.

Types of Leave:

-**VAC***: Vacation (Faculty receive 24 days/year, prorated based on their FTE. Accrual is 2 days/month-16 hours-for a 100% FTE faculty member)

-CFT: Non-UCSF Floater Holiday

-FUR: Furlough

-**UFMLA**: unpaid FMLA (please note that paid and unpaid FMLA are coordinated with your leave specialist and s/he will add FMLA leave to your HBS)

If you take more vacation thanis available on your HBS balance, you will not get paid for the hours that are unaccounted for. Please review your balance before requesting leave.

Current Leave Specialist: Cindy Muzio

Additional Resources

For information on entering time daily, editing a timesheet prior to submission, requesting leave, and for other HBS training, see the <u>HBS Timekeeping System</u> page on the Controller's Office website.

Requesting, Reporting, and Changing Leave in HBS



UCSF employees use Huntington Business Systems (HBS) to submit hours and request leave. This job aid details how to request and enter leave on both monthly and biweekly timesheets. Approvers needing to edit leave on an employee's timesheet may also use this guide for help performing leave edit steps.

Understanding Leave and Leave Types

Any employee that accrues leave is required to use **HBS** to report leave used for each pay period. Leave includes paid types such as vacation, sick, bereavement, jury and military duties, as well as unpaid leave such as furlough.

Timesheet Type	Hours Allowed	Reporting Leave (Unplanned absences)	Requesting Leave (Pre-planned absences)
Monthly	• Full 8 hour shifts only, splitting of leave types on the same day not allowed	 Even if no leave taken, attestation must be given that no leave is being taken for the current period See <i>page 2</i> for instructions 	Use the Submit Leave Requests feature of HBS to request planned absences. If approved by your manager, the requested leave is automatically recorded on your timesheet when the period containing the approved leave opens. Requests for leave are made using the same steps outlined on <i>page 3</i> for all timesheet types.

There are many different types of leave available in HBS. Your selection menu *only displays the leave types available to you*. Some UCSF Health employees have PTO, or Personal Time Off. There two situations when you will require outside guidance to properly submit leave:

Family Medical Leave Act (FMLA)

Requires special handling – see your HR Generalist.

The Family Medical Leave Act (FMLA) is a federal law that provided eligible employees with up to 12 weeks of unpaid, job-protected leave per year for certain family and medical reasons. FMLA allows an eligible employee to elect (or an employer to require) that certain accrued leave be substituted for the 12 weeks of unpaid leave mandated by the Act. University personnel policies and collective bargaining agreements have varying requirements on the use of paid leave for family and medical leave purposes.

Please see your manager with questions about what pay code(s) to select or if you need further guidance on the type to use when requesting or reporting leave.

Logging into HBS using MyAccess

- Login to MyAccess at http://myaccess.ucsf.edu (not shown). Scroll down to locate and select HBS Timekeeping System from the applications menu. If you have set MyAccess to display "Favorites", you may need to change to "All Apps" or search for HBS.
- Use of the Virtual Private Network (VPN) is required to use HBS outside of the UCSF network. For help with the VPN, go to the UCSF IT VPN page.
- In the event MyAccess is unavailable, you can use the HBS direct link: <u>https://hbsweb.ucsfmedicalcenter.org/tpweb/</u>.
- If you do not yet have a MyAccess account or need more help see the Logging Into HBS job aid for more information.

Requesting, Reporting, and Changing Leave in HBS

Reporting or Changing Leave on Monthly Timesheets

If you incur leave that is unplanned (not requested and approved in advance,) you are required to report it on your timesheet before submission. This process is different for *monthly* and *biweekly* timesheets. To report leave on a *monthly timesheet,* begin by clicking **Employee Tasks** > **Timesheet**:

Your monthly timesheet can display in one of two ways depending on the date you access it. If after navigating to your timesheet, you are presented with a timesheet like a, follow step 1 first, otherwise, skip to step 2 below:

- Select the correct month.
- 2 The Report Leave calendar displays. You may use the arrow icons () to switch months if necessary.





- 3 Choose the dates to report or change leave:
 - To report unplanned leave: select the appropriate empty date(s) on the calendar by clicking and dragging or holding down CTRL on your keyboard and clicking individual dates until all desired dates are selected, then click the Report Leave button.
 - To change approved leave: select date(s) with leave to be changed as in a above, and then click the <u>change Leave Type</u> button. Note as an Approver/Manager, you may also perform this task on an employee's timesheet.
 - To *delete leave*: select the appropriate date(s) and click the **Delete Leave** button.

The Report or Change Leave Type interface displays in a new window.

- Select the correct leave type using the drop-down menu but *do not change* the Hours per day. Monthly employees should only submit full 8 hour days of leave.
- 5 Click Save to save without submitting (submit later) or Save & Submit to save and submit your timesheet to your manager for approval. Click Cancel if you would like to start over.



Requesting, Reporting, and Changing Leave in HBS

Submitting and Editing Leave Requests

For both biweekly and monthly timesheet owners:

Click on Employee Tasks > Leave Requests

The Submit Leave Request page displays in HBS.

- Directly enter, or choose using the <u>solution</u> icons, the From and To dates of the leave request. Note you must choose dates *prior* to entering the Type in the next step.
- After choosing dates, the **Type** drop-down menus become available. Choose at least one type of leave to request. If you are requesting a second type of leave during the date range, you may choose a second type using the second drop-down.
- 4 Click the **Submit** button. The **Leave Request Details** page displays.
- 5 Edit the hours on the request as appropriate. Remember that only non-exempt employees can enter leave which is less than their full day shift. All exempt employees must request a full day's hours for whichever leave type applies to the corresponding day (if using more than one type).
- Enter notes to your manager (optional) in the **Employee Notes** section.
- Click Submit.

Your request has been submitted to your manager and you are returned to the leave requests page where your submission is shown in the **Current Leave Requests** section. To *edit the request* before it is approved, click the **From/To** date link (a). You may also delete unapproved requests by clicking the **Delete** link (b).

If you need to edit or delete a request after your manager has approved, ask them to place the request in pending status, which reopens the leave request to you. After editing the request, follow the same steps above to resubmit it for approval.







Additional Resources

This job aid, along with many other learning tools, can be found on the <u>HBS Timekeeping System</u> page on the Controller's Office website. If you are unable to locate a solution using the available tools:

Issue	Contact
HBS access or other <i>technical</i> issues	IT Field Services at 415-514-4100, option 2 or submit a ticket online at http://help.ucsf.edu
Issues with your timesheet	Always work with your manager/supervisor <i>first</i> . If you are unable to reach a solution, your manager will help you escalate the issue to the appropriate channel.