Self Service & Manager Self-Service

User Guide
Effective 11/13/17

**STATE OF MONTANA
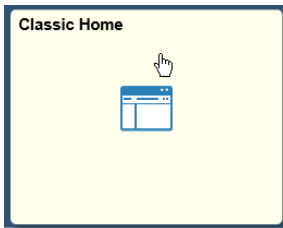PAYROLL**

**STATE OF MONTANA
SABHRS HR**

General Info

Most information below references the newest Self-Service format. If any instructions below to not identically match the navigation you see in Self-Service or Manager Self-Service, click the Classic Home tile to follow the navigation instructions.

Classic Home

## Employee Self-Service

PERSONAL DETAILS

Employees can use SABHRS Self-Service to update addresses, phone numbers, email addresses, and emergency contacts.

Updates to legal names or marital status cannot be made via Self-Service. Contact your agency's HR office for instructions.

Preferred First Name

Do you prefer to be known by your nickname, or use your middle name instead of your first name? You can enter a preferred first name into SABHRS HR Self Service.
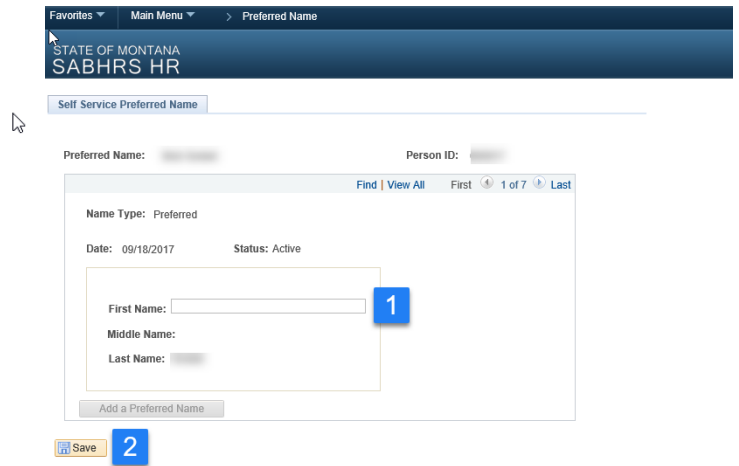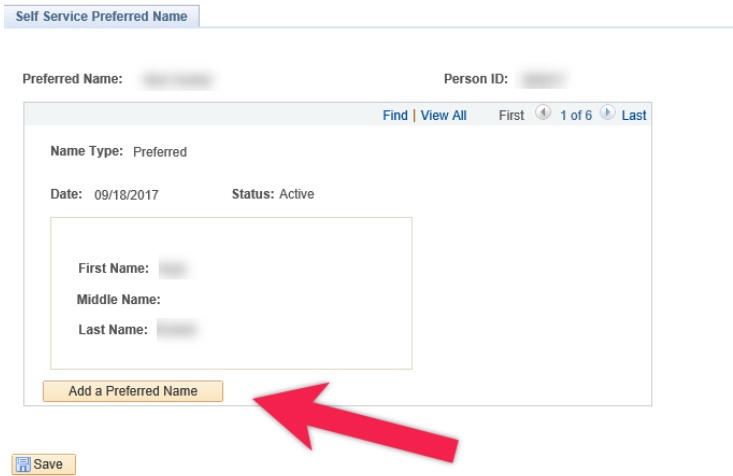
1. Log in to SABHRS HR Self Service
2. Click the Personal Details tile
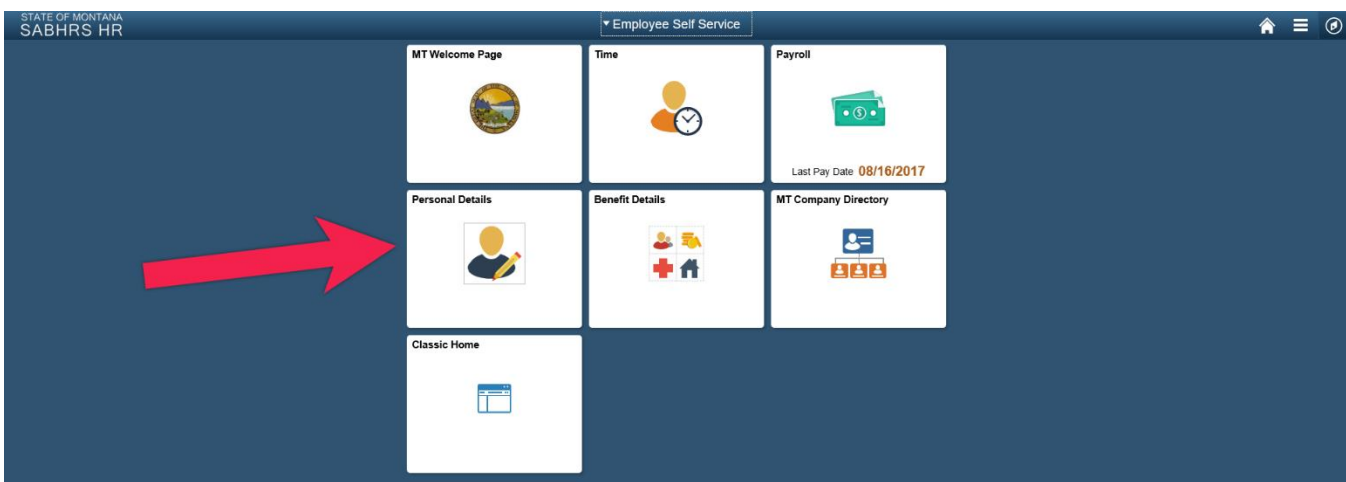
Click

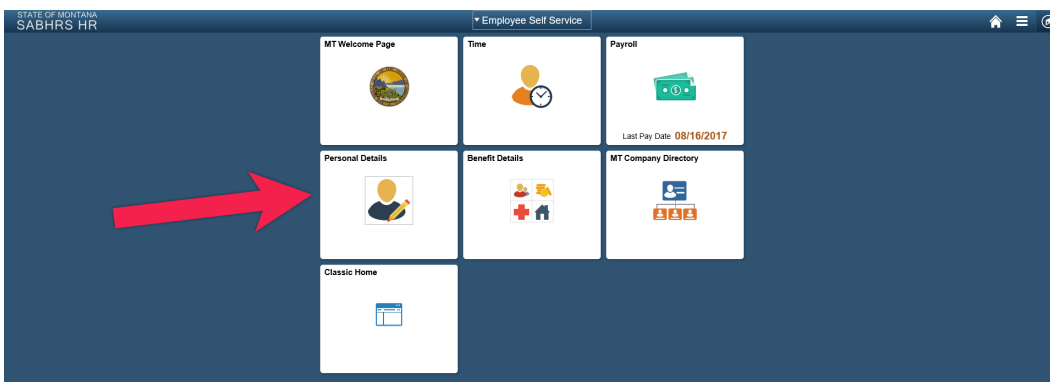Name on the left-hand side of the screen
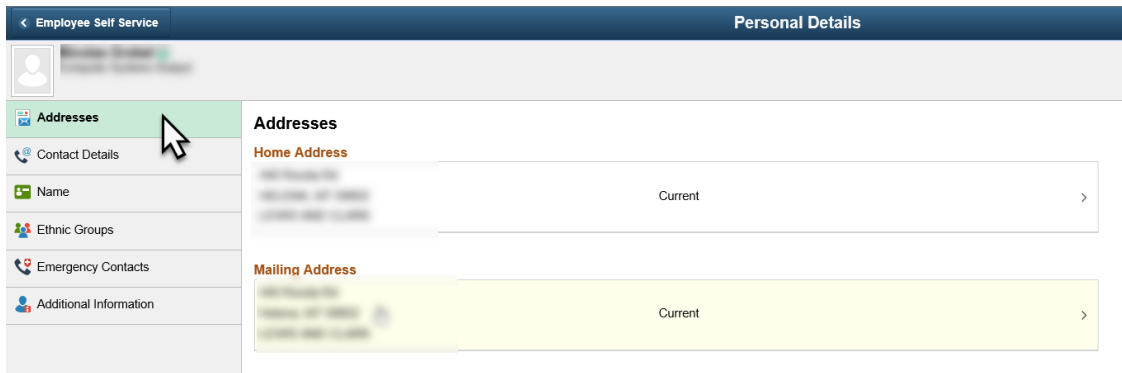
Click Add a Preferred Name

Addresses

Need to add a mailing address or update your home address? You can enter them into SABHRS HR Self Service.

1. SABHRS HR Self Service
2. Click the Personal Details tile

3. Click Addresses on the left-hand side of the screen

4. To edit your home address, click the home address box
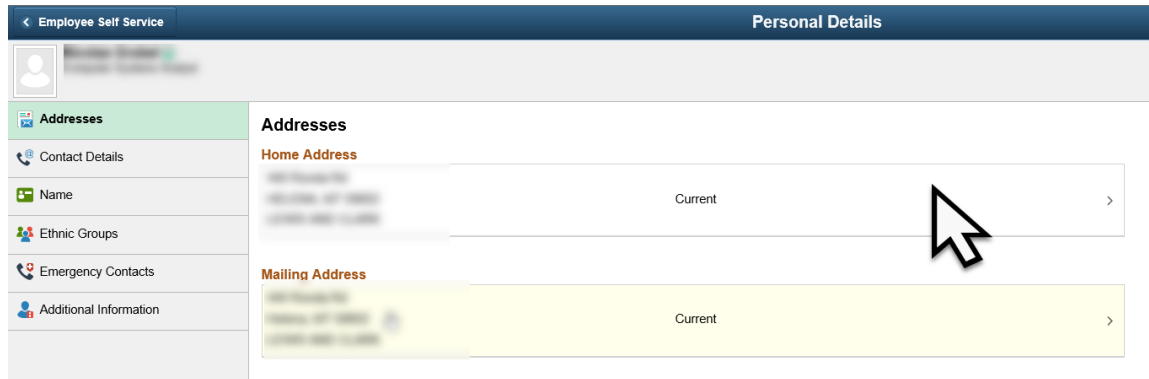
5. Input your changes and click Save

6. SABHRS will access a United States Postal Service Database to confirm your address. If it finds a close match that isn't exactly what you inputted will ask you if you wish to change to the match or keep your original input. Look over the match if it is your address click yes if it isn't right click no.

it
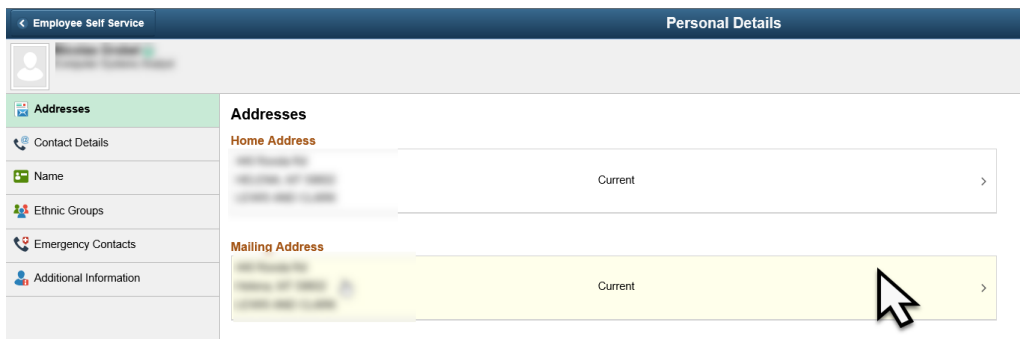
To edit or add a mailing address, click the Mailing Address box and repeat steps 5 and 6

Contact Details (Email, Phone)

Need to add to, update, or delete your contact information? You can enter phone and email information into SABHRS HR Self Service.

1. Log in to SABHRS HR Self Service
2. Click the Personal Details tile
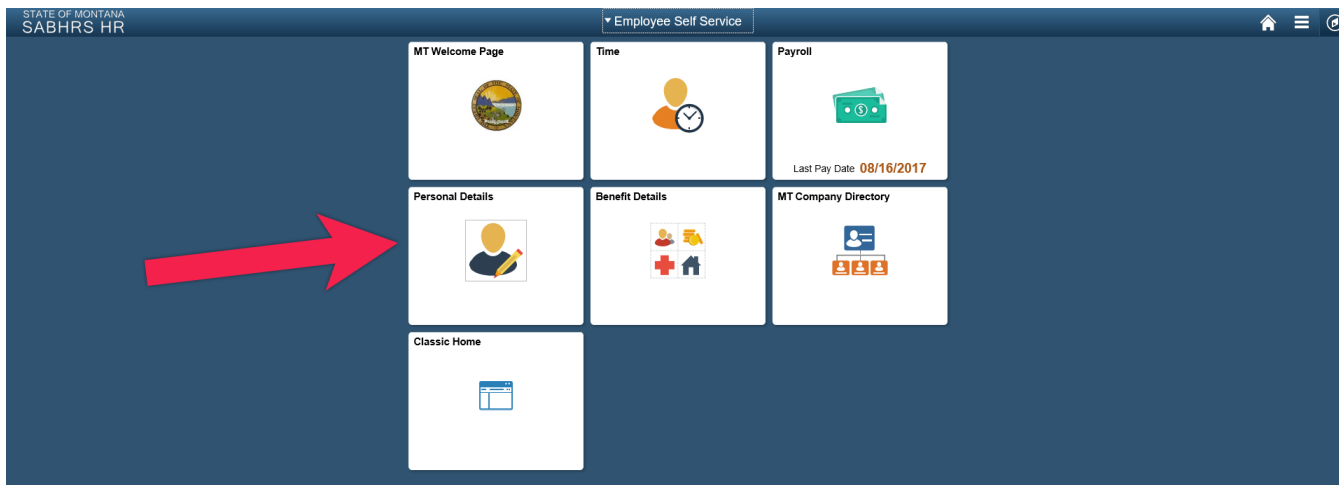
3. Click Contact Details on the left-hand side of the screen
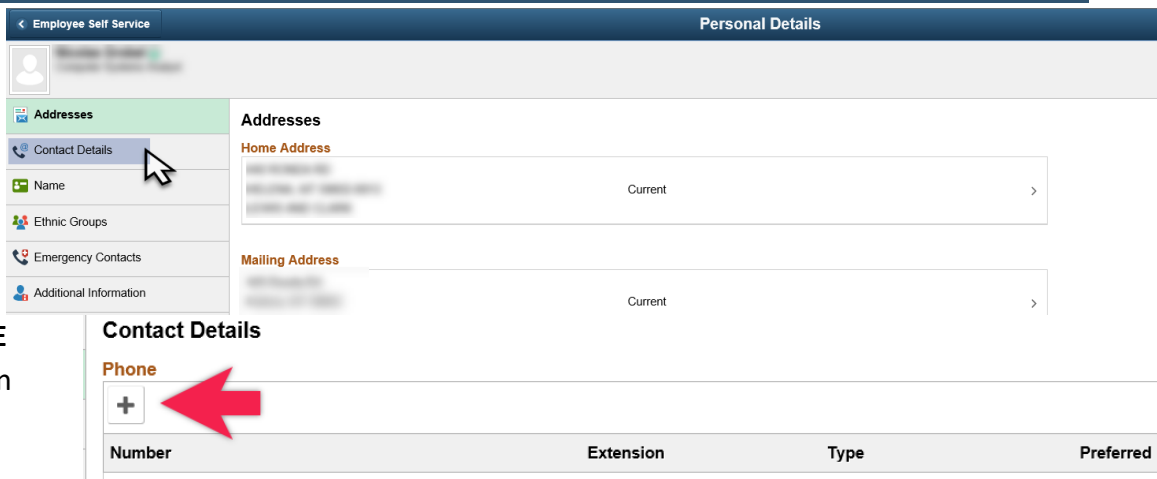
PHONE

ADD A NEW PHONE

1. Click the plus button under Phone

2. Input the phone information

a. Type: There are several phone number types that may be listed in SABHRS
   o MAIN – Primary Personal Phone;
   o BUSINESS – Work Phone;
   o HOME – Residence Phone;
   o MOBILE – Personal Cell Phone;
   o WORK MOBILE DEVICE – Work Cell Phone.
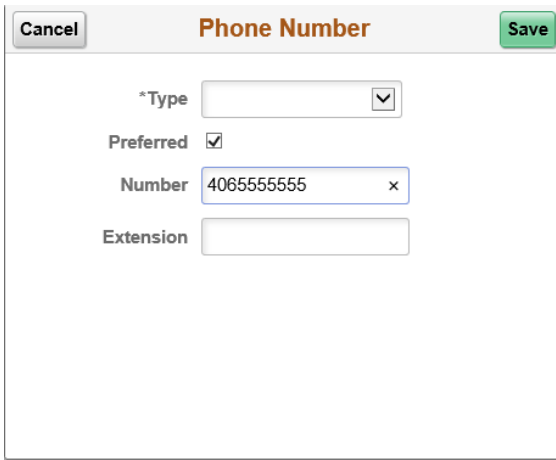
b. Preferred: One phone number must be marked as the preferred number
   i. If the number you are adding is your preferred number check the preferred box, otherwise leave it blank

c. Number: Enter the phone number (including area code)
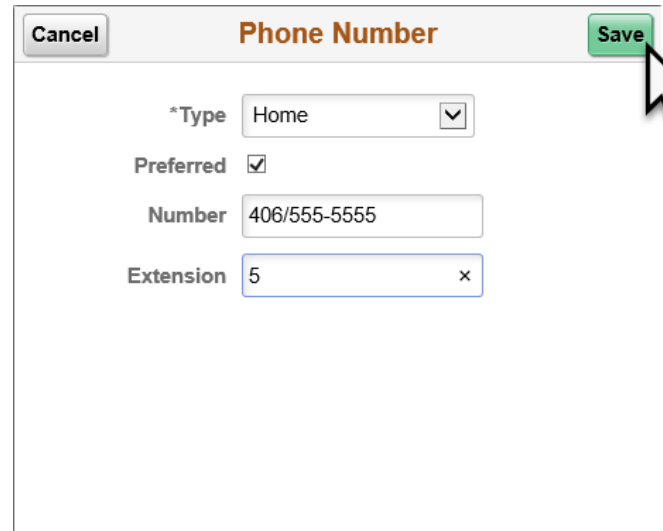
Cancel	**Phone Number**	Save

*Type ⬇

Preferred ☑

Number [4065555555   ×]

Extension [   ]

   i. Phone numbers can be entered in any 10-digit format: (xxx)xxx-xxxx, xxxxxxxxxx, xxx/xxx-xxxx, etc.

Cancel	**Phone Number**	Save

*Type [Home   ⬇]

Preferred ☑

Number [406/555-5555   ]

Extension [5   ×]

d. Extension: If applicable, enter the extension otherwise leave blank

e. Click **Save**

You should now see the phone number populated with the details you entered under Phone

Contact Details

Phone

Number	Extension	Type	Preferred	
▓▓▓▓		Business		>
406/555-5555	5	Home	✓	>

EDIT A PHONE NUMBER

1. Click the phone number you want to edit

Phone

Number	Extension	Type	Preferred	
406/444-4609		Business		>
406/555-5555	5	Home	✓	>

2. Make edits to Type, Number, Extension
   a. NOTE: A number can be made Preferred but it can't be made un-preferred. To change your Preferred number, either add a new number and make it preferred or edit an existing number to be Preferred.
3. Click Save (Top Right)

DELETE A PHONE NUMBER:

1. Click the phone number you want to delete
   a. NOTE: Only phone numbers not marked preferred can be deleted.

2. Click Delete

3. Click Yes

Phone Number

Cancel | Save

Type	Home
Preferred	☑
Number	406/555-5555
Extension	5

Delete

Phone Number

Cancel | Save

Type	Home
Preferred	☐
Number	406/555-5555
Extension	5

Delete

Phone Number

Cancel | Save

Type | Home
Preferred | ☐

Are you sure you want to delete your "Home" phone?

Yes | No

Delete

EMAIL

ADD A NEW EMAIL

1. Click the plus button under Email

Email

Email Address	Type

Input email information
   a. NOTE: Unless otherwise directed, leave your business email marked preferred

Click Save

EDIT AN EMAIL

1. Click on the email you want to edit

Email

Email Address	Type	Preferred	
testhr01@mt.gov	Business		›
testhr02@mt.gov	Home	✓	›

2. Make edits to Email Type and/or Email Address
   a. NOTE: Business Email type cannot be edited using Self Service. Contact ITSD (Information Technology Services Division) for changes to business email

Email Type: Home
Preferred: ✓
Email Address: testhr02@mt.gov

Delete

3. Click Save

DELETE AN EMAIL

1. Click on the email you want to delete
   a. NOTE: Business Email cannot be deleted

Email

Email Address	Type	Preferred	
testhr01@mt.gov	Business		›
testhr02@mt.gov	Home	✓	›

2. Click Delete

3. Click Yes

Ethnic Groups

Need to make changes to your race or ethnicity information? You can make changes to this information using SABHRS HR Self Service.

1. Log in to SABHRS HR Self Service
2. Click the Personal Details tile

3. Click Ethnic Groups on the left-hand side of the page

4. The Ethnic Groups page populated with your current ethnicity and race information will appear

Ethnic Groups

Montana state government is committed to attracting, developing, and retaining a talented, diverse, and inclusive workforce by promoting a culture of individual dignity and respect. State agencies collect demographic data to evaluate complianc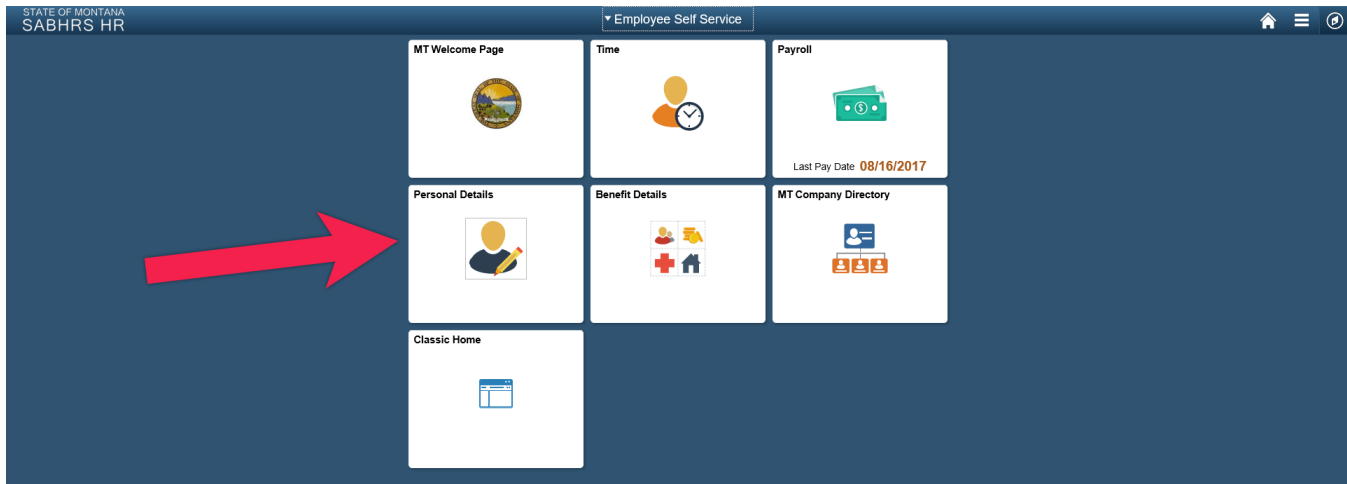e with federal and state equal employment opportunity laws and regulations and for mandatory reporting in accordance with 29 CFR 1607.4.

The Equal Employment Opportunity Commission requires us to report on race/ethnicity. If you choose not to select the race you most closely identify with, your HR staff will make a visual determination. You may change the race category at any time to ensure we are reporting accurate information.

This information will only be used for promoting compliance with federal and state equal employment opportunity laws and regulations and mandatory reporting. Access to this information is controlled and will not be used to make employment decisions affecting you.

Select the category or categories you most closely identify with.

1) Are you Hispanic or Latino?   Explain

     ◉ Yes
     ○ No

2) What is your race? Select one or more.   Explain

    ☐ American Indian or Alaska Native
    ☐ Asian
    ☐ Black or African American
    ☐ Native Hawaiian or Pacific Islander
    ☑ White

    a. Click the explain link next to each selection area for more information

5.   Click the edit button

6.   Make any necessary changes

Cancel	**Ethnicity**	Save

1) Are you Hispanic or Latino?   Explain

    ◉ Yes
    ○ No

7.   Click Save

2) What is your race? Select one or more.   Explain

    ☐ American Indian or Alaska Native
    ☐ Asian
    ☐ Black or African American
    ☐ Native Hawaiian or Pacific Islander
    ☑ White

Emergency Contacts

Need to add, edit, or remove an emergency contact? You can do that using SABHRS HR Self Service.

1. Log in to SABHRS HR Self Service
2. Click the Personal Details tile
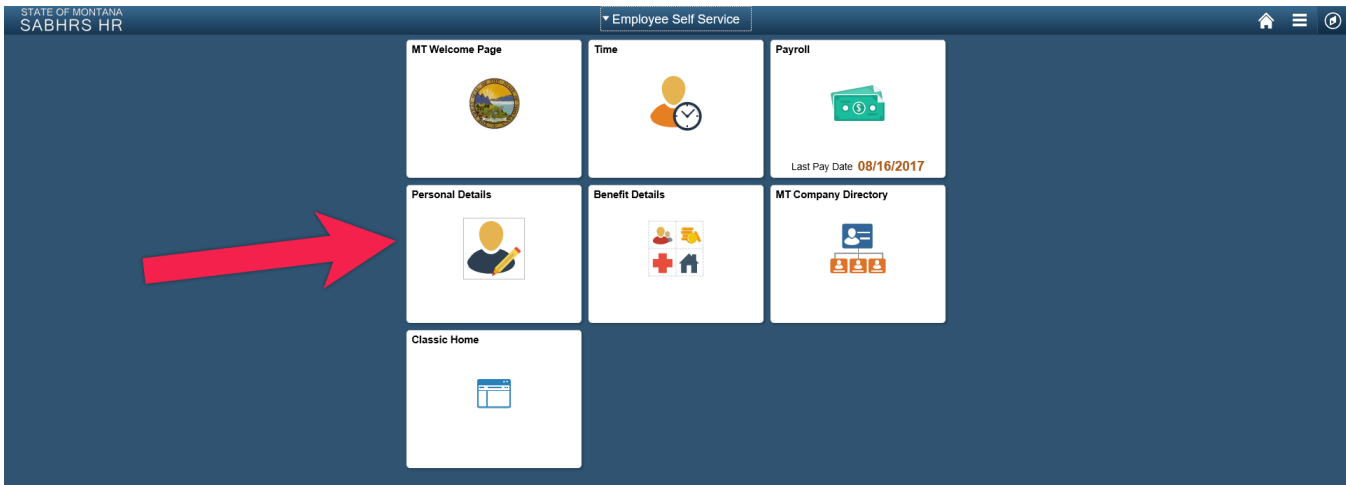
3. Click Emergency Contacts on the left-hand side of the screen
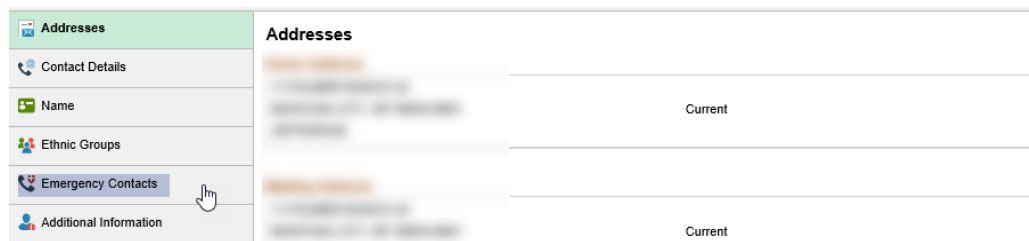
ADD AN EMERGENCY CONTACT

1. Click the plus button below Emergency Contacts

2. Input a Contact Name, select a Relationship, and if you want this new emergency contact to be your primary emergency contact in the event of an emergency check the Preferred box.

3. Click Add Phone Number
   a. Select a Type
   b. Input a Number
   c. Add an extension if necessary
   d. Note: you can check the Same as mine box if the Emergency contact shares the same number as you. Your Preferred number will be populated into the boxes
   e. Click Done

4. Address is not required. To add an address for this new emergency contact click Add Address

    a. Enter the address information and click Done
    b. If the emergency contact shares your address click the Same as mine and your preferred address information will populate in the boxes.
    c. Click Done

5. Click Save

EDIT AN EMERGENCY CONTACT

1. Click the contact you want to edit

2. Make edits to Contact Name or Relationship

3. Make edits to Phone Numbers

    a. Click on the Phone number you want to edit
    b. Make changes to Type and Number
    c. Add an extension if applicable
    d. Click Done

4. Add a Phone Number

    a. Click the add button under Phone Numbers
    b. Enter the Number and select a Type
    c. Click Done

5. Delete a Phone Number
   a. Click the phone number you want deleted
   b. Click the Delete button at the bottom of the screen
   c. Click Yes

Are you sure you want to delete Phone Number (555/555-5555)?

Yes   No

6. Edit Address
   a. Click the address
   b. Make changes to information
   c. Note: if Same as Mine is checked you will not be able to make changes. Uncheck Same as Mine to make changes to emergency contact address

Cancel   **Emergency Contact**   Save

*Contact Name   Batman   x
*Relationship   Other
Preferred   ☑

Address
125 N ROBERTS ST
HELENA ,MT 59601-4558
LEWIS AND CLARK

Phone Numbers
+

Phone	Extension	Type
		Business

DELETE AN EMERGENCY CONTACT

1. Click the Emergency Contact you want to delete
   a. Click Delete
   b. Click Yes

Are you sure you want to delete Emergency Contact (Batman)?

Yes   No

Cancel   **Emergency Contact**   Save

*Relationship   Other
Preferred   ☑

Address
125 N ROBERTS ST
HELENA ,MT 59601-4558
LEWIS AND CLARK

Phone Numbers
+

Phone	Extension	Type
555/555-5555		Business

Delete

2. NOTE: You must have at least one Emergency Contact

Additional Information

Additional information can include gender, date of birth, birth country, birth state, social security number, original start date, and highest education level. To edit any of this information, contact your human resources department.

TIME

Employees can use SABHRS Self-Service to enter time, check leave balances, and delegate approvals
1. Log in to SABHRS HR Self Service
2. Click Time

Enter Time

Need to submit your time? SABHRS HR Self Service has a variety of ways to enter time, even on a mobile device! Employees can enter time using the mobile friendly daily or weekly pages. Employees also have the option of using the classic timesheet.
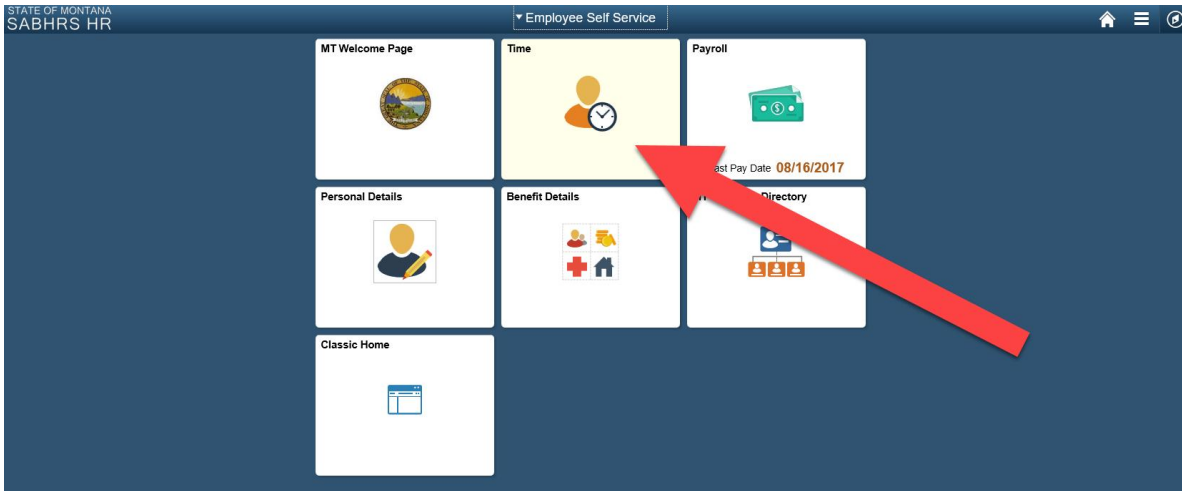
CLASSIC TIMESHEET

1. Click Classic Timesheet on the left-hand side of the screen
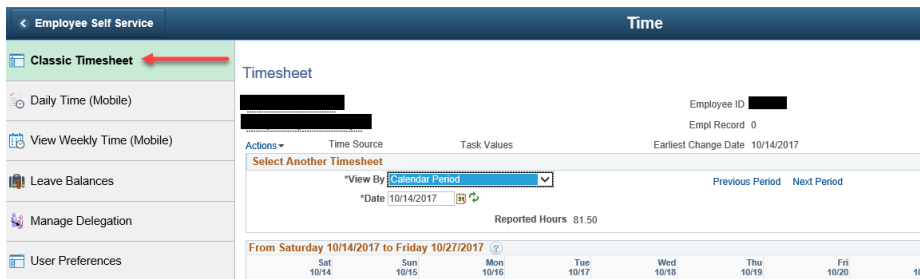
2. OPTIONAL: Select a View By from the drop down
   a. Select Week, Day, or Calendar Period
   b. Click the green refresh button next to Date
   c. **NOTE:** This guide will view by week
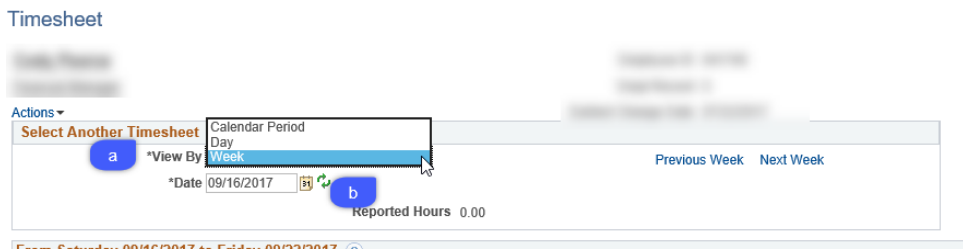
3. Enter the appropriate hours in the field for each day worked:

	Sat 9/16	Sun 9/17	Mon 9/18	Tue 9/19	Wed 9/20	Thu 9/21	Fri 9/22	Total	Time Reporting Code	Task Profile ID		
			8									

4. Select a time reporting code from the drop down

a. NOTE: You must select a Time Reporting code from the drop-down list and a corresponding Task Profile ID from the Task Profile look-up field. If you are unsure of which Task profile or Time Reporting code to use contact your Agency HR/Payroll office for help.

5. Click the 🔍 button to lookup the appropriate task profile ID

a. Search or click a Task Profile ID
   i. The search results should be pre-populated with the task profile id's that are typically used.
   ii. Id's can be searched by name or by current active status
   iii. NOTE: only those task profile ID's assigned to you will show up in search. If a particular task profile id is not available, contact your supervisor or agency HR representative.

6. Each row on the timesheet represents a combination of hours, time reporting codes, and task profile IDs.
   a. Use the plus and minus buttons at the end of the row to add or subtract rows as necessary (one row is the minimum requirement).
      i. For example, if you were sick for half the day on Friday you would have one row with hours, a time reporting code, and a task profile id for the time you worked as well as another row with hours, a time reporting code, and a task profile id for the sick leave.

From Saturday 09/16/2017 to Friday 09/22/2017 ⓘ	Sat 9/16	Sun 9/17	Mon 9/18	Tue 9/19	Wed 9/20	Thu 9/21	Fri 9/22	Total	Time Reporting Code	Task Profile ID			
			8.00	8.00	8.00	8.00	4.00	36.00	01 REG - Regular Earnings ▾	61100300 🔍	➕	➖
							4.00	4.00	02 SLT - Sick Taken ▾	61100300 🔍	➕	➖

7. Click the 'Save for Later' button at any time to save the time entered.
   a. IMPORTANT: Clicking 'Save for Later' does not submit time to your manager for approval
      i. Time is in a saved status, as we recommend you submit all your time at once.

From Saturday 09/16/2017 to Friday 09/22/2017 ⓘ	Sat 9/16	Sun 9/17	Mon 9/18	Tue 9/19
			8.00	8.00

Save for Later   Submit

   b. The system will ask to "validate worked time"
      i. Click Yes

Would you like to validate worked time? (13504,10066)

Yes   No

8. When all time has been entered, click Submit for your manager to approve.
   a. If you don't know when you should get your time approved check with your manager for more information.

From Saturday 09/16/2017 to Friday 09/22/2017 ⓘ	Sat 9/16	Sun 9/17	Mon 9/18	Tue 9/19
			8.00	8.00

Save for Later   Submit

9. OPTIONAL: After you click the Save For Later or the submit button, select the
   a. Reported Time Status Tab
      i. This tab will provide you with a summary of your reported time for each time reporting code used for each day as well as the status your time is in: Saved, Needs Approval, or

Save for Later   Submit

Reported Time Status | Summary | Leave / Compensatory Time | Exceptions | Payable Time

▼ Reported Time Status

Date	Reported Status	Total	TRC	Description	Add Comments	Comments Preview
09/18/2017	Saved	8.00	REG	Regular Earnings	○	
09/19/2017	Saved	8.00	REG	Regular Earnings	○	
09/20/2017	Saved	8.00	REG	Regular Earnings	○	
09/21/2017	Saved	8.00	REG	Regular Earnings	○	
09/22/2017	Saved	4.00	REG	Regular Earnings	○	
09/22/2017	Saved	4.00	SLT	Sick Taken	○	

Submitted

    ii. At the end of each row of time is a Comment bubble

        1. This field is intended for those times when your supervisor wants you to give more information about the time you have entered

        2. Comments field is also used to help track FMLA leave taken

          a. If you are on FMLA and you use leave for FMLA purposes, please note that in the Comments field.

             i. You must use the letters FMLA for the report to pick up the leave. (EX: "FMLA - 8 hours of SLT on 2/5/07 were FMLA leave.")

             ii. Click Add Comment to add multiple comments for a single instance

             iii. Click Apply to save

             iv. Click OK to save and exit back to Timesheet

10. OPTIONAL: Double-check your hours. Click the Summary tab to see your hours totaled by category and separated by week.

11. OPTIONAL: Look at your leave balances by clicking the Leave / Compensatory Time tab. Leave Balances are displayed by clicking the Leave / Compensatory Time tab

    a. The balances you see during the first week of the pay period will be different from the balances you see after Monday of the second week of the pay period.

    b. Leave is not accrued until after time has been earned.

    c. The Leave Accrual process is run on "Payroll Monday," the Monday before paychecks are distributed

12. OPTIONAL: View your exceptions by clicking the Exceptions tab
   a. Exceptions are generated when time is reported and either an aspect of the time is incorrect, or the time does not comply with a defined rule
   b. The fields on this tab display any exceptions that occurred within the timesheet dates and the associated recommended actions.
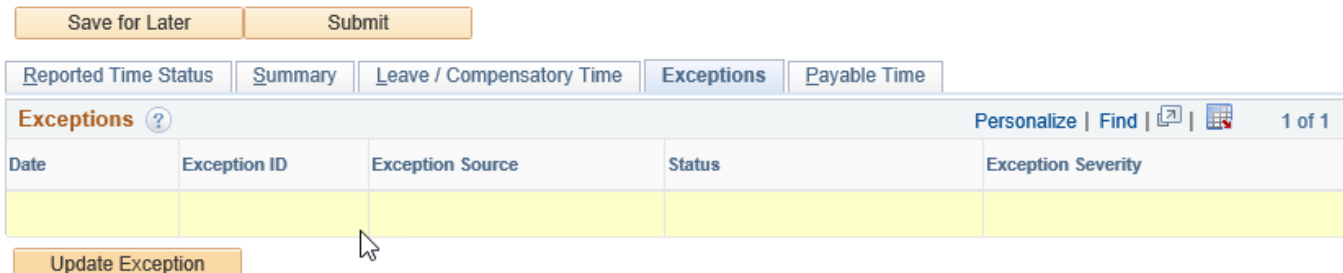
DAILY TIME (MOBILE): ADD NEW TIME

1. Click Daily Time (Mobile) on the left-hand side of the screen
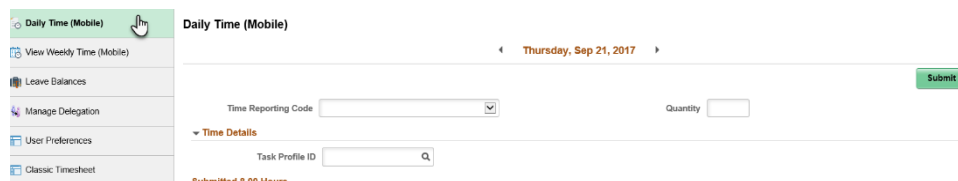
2. Daily Time (Mobile) is a mobile friendly page for employees that like to enter, view, or edit time daily
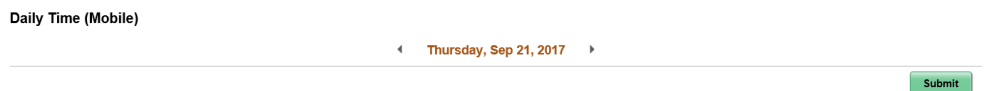
3. Select a Time Reporting Code from the drop down
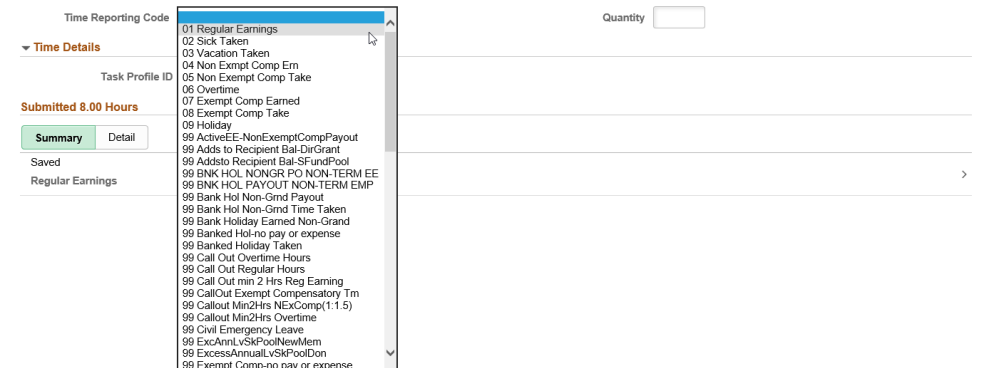
4. Enter the number of hours worked in the Quantity field
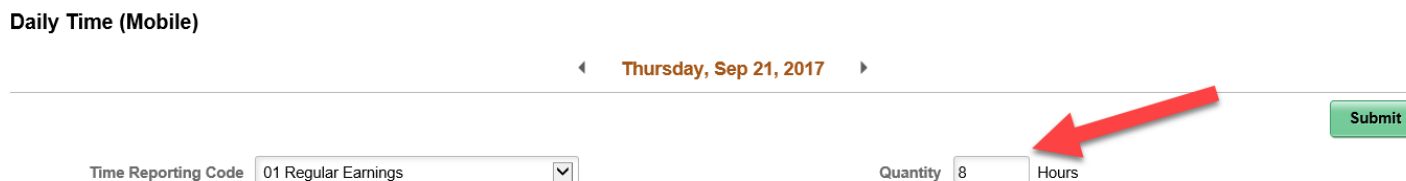
5. Enter a Task Profile ID

  a. Click the 🔍 button in the Task Profile ID field

    i. If you don't see the ask Profile ID field click the ▶ next to Time Details

Time Reporting Code   01 Regular

▶ **Time Details**

  b. Click a Task Profile ID from the available choice

Cancel	Lookup

Search for: Task Profile ID

▶ Search Criteria

▼ Search Results

4 rows

Task Profile ID ⬦
61100300
61100308
611NASPO
SAD_SSSA

    i. OPTIONAL: Click the ▶ next to Search Criteria

      1. Search by Task Profile ID name
      2. Search by active status

▼ Search Criteria   Show Operators

Taskgroup 6113APFRS

Task Profile ID
(begins with) [_____] 🔍

Status as of Effective Date [Active ▼]

[Search] [Clear]

▼ Search Results

  c. You can also type the first few letters of a Task Profile ID in the field and the system will populate a list of possible ID's based on your input

    i. You must click one the options to have it populate the field

▼ Time Details

Task Profile ID [6   × 🔍]

Submitted 0 Hours

Task Profile ID
61100300
61100308
611NASPO

6. Click Submit

  a. This will submit the hours your worked under that Time Reporting Code with that Task Profile ID to be approved by your supervisor

b. A summary of your submitted time will appear under the Summary tab

Daily Time (Mobile)

◀ **Saturday, Sep 23, 2017** ▶

Submit

Time Reporting Code ⬜▾   Quantity ⬜

▾ Time Details

Task Profile ID ⬜🔍

Submitted 8.00 Hours

| Summary | Detail |

| Regular Earnings | 8.00 Hours | ⟩ |

c. For more details click the Detail tab
d. IMPORTANT NOTE: all the information you entered or searched for before clicking Submit will vanish.
   i. This is so you can potentially enter more time perhaps with a different Task Profile ID or Time Reporting Code one the same day

7. Repeat steps 3 through 6 for all hours worked in each Task Profile ID and or/for each Time Reporter Code used on the current date
   a. Example 1: you went home sick today halfway through the day
      i. Select Time Reporter Code: 01 Regular Earnings
      ii. Enter the number of hours worked before you went home
      iii. Input or lookup the appropriate Task Profile ID
      iv. Click Submit
      v. Confirm your submitted hours summary and details

◀ **Monday, Sep 25, 2017** ▶

Submit

Time Reporting Code ⬜▾   Quantity ⬜

▾ Time Details

Task Profile ID ⬜🔍

Submitted 4.00 Hours

| Summary | Detail |

| Regular Earnings | 4.00 Hours | ⟩ |

      vi. Select Time Reporter Code: 02 Sick Taken
      vii. Enter number of sick hours taken
      viii. Input or lookup the appropriate Task Profile ID
      ix. Click Submit
      x. Confirm your submitted hours summary and details

Daily Time (Mobile)

◀ **Monday, Sep 25, 2017** ▶

Submit

Time Reporting Code ⬜▾   Quantity ⬜

▾ Time Details

Task Profile ID ⬜🔍

Submitted 8.00 Hours

| Summary | Detail |

| Regular Earnings | 4.00 Hours | ⟩ |
| Sick Taken | 4.00 Hours | ⟩ |

b. Example 2: You are working on a new project and your manager wants you to keep track of you time using Task Profile ID's. Today you have worked for 2 hours on the new project and 6 hours on your usual work

   i. Select Time Reporter Code: 01 Regular Earnings
   ii. Enter or lookup the Task Profile ID for your usual work
   iii. Enter 6 in the Quantity field for the number of hours worked
   iv. Click Submit

   i. Select Time Reporter Code: 01 Regular Earnings
   ii. Enter or lookup the Task Profile ID for the new project
   iii. Enter 2 in the Quantity field for the number of hours worked
   iv. Click Submit

DAILY TIME (MOBILE): EDIT TIME

1. Click Daily Time (Mobile) on the left-hand side of the screen

2. Daily Time (Mobile) is a mobile friendly page for employees that like to enter or edit time daily
3. Make sure the date you want to edit time for is correct at the top of the page
   a. Use the left or right chevron to change to the correct date as necessary

b. MOBILE HINT: If you click on the date it will open a mogul window date selector.
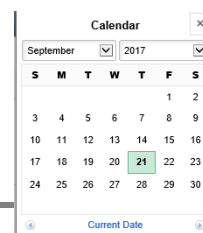
4. Under Summary click the line Item you want to edit

Submitted 8.00 Hours

Summary	Detail	
Regular Earnings		6.00 Hours
Regular Earnings		2.00 Hours

5. Make any necessary edits
   a. Click Delete to delete this line item

6. Click Submit

VIEW WEEKLY TIME (MOBILE): ADD NEW TIME

1. Click View Weekly Time (Mobile) on the left-hand side of the screen

2. View Weekly Time (Mobile) is a mobile friendly page for employees that like to enter, view, or edit time weekly

3. Weekly Time (Mobile) shows each day of the week as a row
   a. The currently displayed week is visible at the top of the page
      i. You can scroll to future weeks with the right chevron
      ii. You can scroll to past weeks with the left chevron

4. Click on the day you want to add or edit time

View Weekly Time (Mobile)

◀ **09/16/17 - 09/22/17** ▶

Weekly Total 40.00 Hours

Saturday, September 16

No time reported

›

Sunday, September 17

No time reported

›

Monday, September 18

Regular Earnings 8.00 Hours

Total 8.00 Hours ›

5. Follow steps provided under Daily Time (Mobile): Add New Time to add new time
6. Follow steps provided under Daily Time (Mobile): Edit Time to edit time

Check Leave Balances

Want to find out how much leave time you have? Checking leave balances is easier than ever with SABHRS HR Self Service.

1. Click Leave Balances on the left-hand side of the page

‹ Employee Self Service	Time	🏠 ≡ ⓘ
○ Daily Time (Mobile)	**Daily Time (Mobile)**	
📱 View Weekly Time (Mobile)	◀ **Thursday, Sep 21, 2017** ▶	
📋 Leave Balances		Submit
👤 Manage Delegation	Time Reporting Code [⌄] Quantity [ ]	
📄 User Preferences	▾ Time Details	
📄 Classic Timesheet	Task Profile ID [🔍]	
	Submitted 8.00 Hours	

2. Scroll through your leave balances

Leave Balances

Leave Balances Summary (In Hours)

Sick	33.69	9999	›
Vacation	97.88	9999	›
Banked Holiday Non-Grandfather	0.00	9999	›
On Call Comp Time	0.00	9999	›
FLSA Exempt Comp Time	0.00	9999	›
FLSA Non-Exempt Comp	0.00	9999	›
Banked Holiday	0.00	9999	›

3. Click on a balance item for more information

Leave Balances

Leave Balances Summary (In Hours)

Sick	33.69	9999	
Vacation	97.88	9999	›
Banked Holiday Non-Grandfather	0.00	9999	›
On Call Comp Time	0.00	9999	›
FLSA Exempt Comp Time	0.00	9999	›
FLSA Non-Exempt Comp	0.00	9999	›
Banked Holiday	0.00	9999	›

Return to Leave Balances

Leave Balance

Sick Balance	Minimum Balance	Maximum Balance
33.69	0	9999

Leave Balance Details

Accrual Date	Earned	Taken	Balance
08/04/2017	0.00	0.00	37.69
07/21/2017	0.00	0.00	37.69
07/07/2017	3.69	0.00	37.69
06/23/2017	3.69	0.00	34.00

4. Scroll through your Leave Balance Details

5. Click Return to Leave Balances to go back to a list of your leave balances

Setting time reporter user preferences

SABHRS HR allows you to set your timesheet defaults based on your viewing preferences.

Navigation: Classic Home > Main Menu > Self-Service > Time Reporting > User Preferences
1. Choose the manner in which you wish to display your time reporting codes (TRCs) on your timesheet for TRC Presentation from the drop-down menu:

There are two options:

a. Choose Show CODE - Description to show the TRC Code first then the TRC Description
b. Choose Show Description - CODE to show the TRC description first then the TRC Code

The default is Show Code – Description.

2. Choose the manner in which you want your time to be prepopulated on the timesheet from the Time Pre-population method drop-down menu. The default is OFF (this means your timesheet will be blank and you must type in your hours manually).

OFF – Select this value to not default any values.

PRIOR PERIOD = The Hours, Time Reporting Codes, and Task profiles used will prepopulate from the previous pay period.

SCHEDULE INFORMATION = will automatically populate 8 hours a day, Monday through Friday

TASK VALUES = Timesheet will have no values and will need to be manually populated with hours, etc.

3. Choose the manner in which you want your time reporting period to be displayed from the Default Timesheet Display drop-down menu. The default is by Time Reporting Period. The other two choices to choose from are Daily, or Weekly.

4. Choose which day of the week you wish to be listed first on the timesheet from the Start Day of the Week drop-down menu. The default day is 6 - SATURDAY (the beginning of each pay period).

5. Choose whether you want a submit confirmation to pop up when you click the submit button. The default is Yes (Confirm)

6. Choose to Allow Real-time Processing of the Timesheet by Status Pivot Grid. This Feature currently is not being used.

Click the Save button to save your changes.

Delegating time

Who to contact for help

The first place to look for help with delegation is this guide. If you need additional help, contact your agency HR/payroll office staff. They will be able to provide you with agency specific delegation and time approval information. Also, if you are unable to perform a delegation yourself due to an emergency situation your agency HR/payroll office staff can perform the delegation on your behalf.

Delegation info

When an employee submits time in self-service, the person listed as the employee's "reports to" in SABHRS will be responsible for approving the employee's time. In some agencies, the "reports to" is the employee's manager or supervisor; in other agencies the "reports to" is another designated person. Check with your agency's HR/payroll office if you have questions about the "reports to."

If you will be on vacation or otherwise cannot approve your employees' time, you have the option to delegate your time approving duties to another person, preferably another manager, in your agency. This ability is called "delegate approval authority."

Delegating time approval responsibilities (to a proxy)

The person you are asking to assume your time approval responsibilities is called the proxy. The proxy receives an email notification inviting them to accept the invitation. The proxy must accept the invitation to be able to approve the time in the timeframe designated by the delegator.

Navigation: Classic Home tile > Main Menu > Self-Service > Manage Delegation

1. Click the Create Delegation Request hyperlink.

2. Enter the start and end dates of the delegation timeframe in the From and To Date fields. Open-ended delegations are not allowed; therefore, an end date must be included for all delegations.

3. Click the Next button.

4. Click in the box next to Manage Approve Reported Time.

5. Click the Next button.

6. Choose the person to delegate the approval authority to. There are two options:

    a. Choose from the suggested list of people by selecting the radio button next to the individual's name, or
    b. Choose another individual to delegate the responsibility to by clicking the Search by Name hyperlink. If the person you wish to be the proxy is not in your suggested list, click the Search by Name hyperlink to choose another individual. Type the individual's last name or the first few letters of their last name in the Last Name field and click the Search button. A list of potential matches will be displayed. Choose the person from the list of possible matches by clicking on the radio button next to their name. It is important to choose a proxy who works within your agency.

7. Click the Next button.

8. Click the OK button.

Reviewing delegated time approval responsibilities

Navigation: Classic Home tile > Main Menu > Self-Service > Manage Delegation

1. Click the Review My Proxies hyperlink.

2. Choose which request(s) you wish to check by selecting a status from the Show Requests by Status drop-down field and clicking the Refresh button (or, leave the status blank and click the Refresh button to return a list of delegations meeting all statuses).

3. The information based on your status selection appears. Click the 🛈 in the Details column of the table to view more details about the request, including checking the status of the request(s).

Revoking delegated time approval responsibilities

Navigation: Classic Home tile > Main Menu > Self-Service > Manage Delegation

1. Click the Review my Proxies hyperlink.

2. Click in the box next to the row of the delegation request you wish to revoke.

3. Click the Revoke button.

4. Click the Yes-Continue button.

5. Click the OK button.

Accepting/rejecting time approval delegation responsibilities (as a proxy)

The person the delegator asks to assume their time approval responsibilities is called the proxy. The proxy receives an email notification inviting them to accept the invitation. The proxy must accept the invitation to be able to approve the time in the timeframe designated by the delegator. The invitation can be accepted one of two ways: by clicking on the hyperlink in the email notification and logging-in to SABHRS HR, or by following the instructions below.

Navigation: Classic Home tile > Main Menu > Self-Service > Manage Delegation

1. Click the Review My Proxies hyperlink.

2. Locate the rows in the table that correspond with the delegation request you are accepting (usually all of the rows will correspond).   Check the appropriate rows or click the Select All button to select all of them.

3. Click the Accept button.

4. Click the OK button.

Approving time approval delegation responsibilities (as a proxy)

Time approved by a proxy should be approved from the Reported Time page (as opposed to the Timesheet page). This is because a proxy may not have access to approve certain employee time from the Timesheet page (only people with security access to an employee's time and labor group will have access to the timesheet from the Timesheet page – this access is controlled by your agency's payroll office).

Navigation: Classic Home tile > Manager Self-Service > Time Management > Approve Time and Exceptions > Reported Time

Follow the same instructions for approving and editing time within this guide.

Proxies should watch out for the following items:

- Only employees who have submitted time for approval will be returned on this page when clicking the Get Employees button.
- Watch out for the criteria entered in the Employee Selection Criteria fields (be sure you do not inadvertently include search criteria that will prevent you from viewing an employee's timesheet).
- Watch out for the value in the View By drop-down as time will only be displayed based on that value.
- Watch out for the date in the Date field as time will only be displayed based on that value.

Reviewing delegated time approval responsibilities (as a proxy)

Navigation: Classic Home tile > Main Menu > Self-Service > Manage Delegation

1. Click the Review My Proxies hyperlink.

2. Choose the status you wish to check by selecting a status from the Show Requests by Status drop-down field and clicking the Refresh button (or, leave the status blank and click the Refresh button to return a list of all statuses).

Paychecks

When you set-up a direct deposit you have the option to suppress the pay advice/stub that is generated when your money is deposited. Suppressing your pay advice/stub is recommended because it saves paper and handling fees. The pay advice/stub is always available by navigating to your paycheck in Self-service at any time (even for previous pay periods).

Suppressing your pay advice/stub

Navigation: Classic Home tile > Main Menu > Self-Service > Payroll and Compensation > Direct Deposit

1. Click the Pay Statement Print Option hyperlink.

2. Leave the box unchecked to suppress the paycheck advice/stub (remember – you can always get a copy later if needed); check the box if you wish to receive a paycheck advice/stub each pay period.

Viewing your pay advice/stub as a PDF

Regardless of whether or not an employee receives a paper check, all pay advices as of October 19, 2011 are now available as PDFs via Self-Service. PDFs can be saved to a location on your computer or can be printed. Pay advices prior to that date are available for viewing via Self-Service as HTML web documents.

Paycheck Data is accessed from the Payroll tile in Employee Self Service:
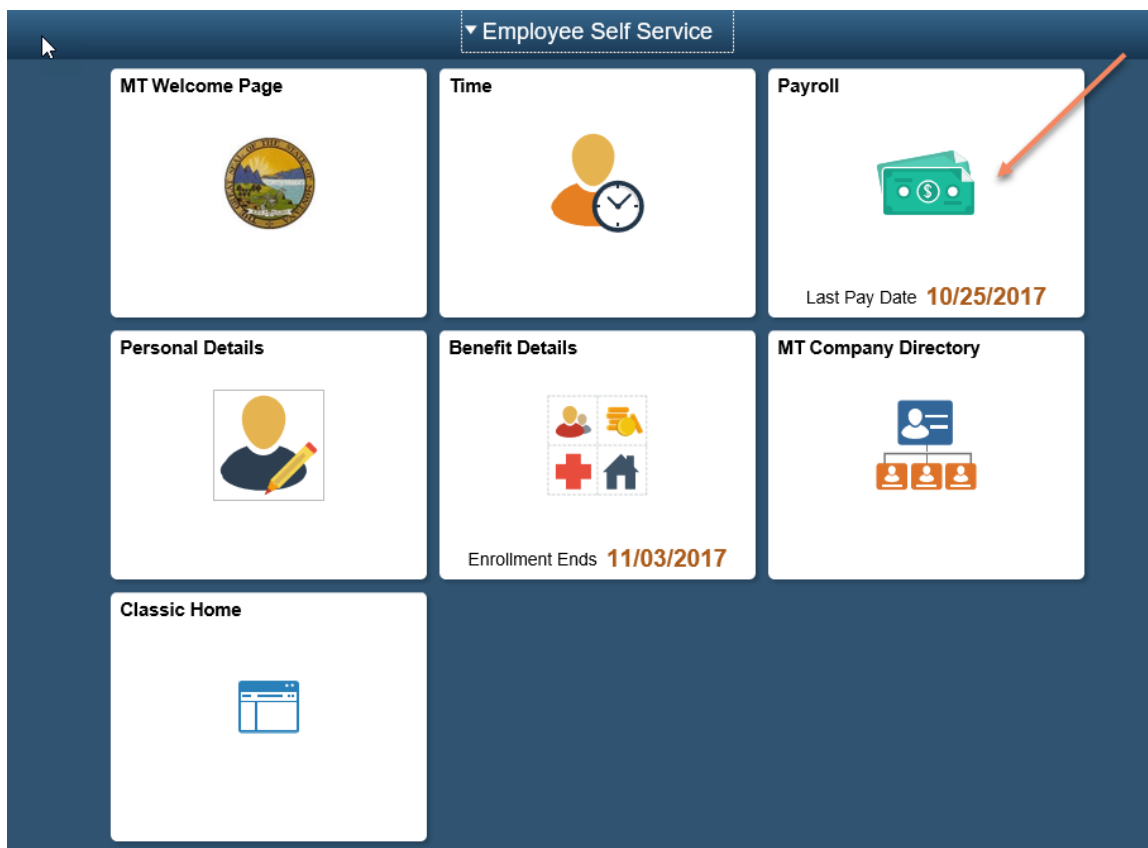
or by navigation: *Main Menu > Self Service > Payroll and Compensation > Pay*

Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number
10/25/2017	State of Montana	09/30/2017 10/13/2017	$1985.50	5491618
10/11/2017	State of Montana	09/16/2017 09/29/2017	$1985.50	5478835

A list of the **seven** most recent paychecks will be presented. If you are looking for an older paycheck that is not visible, select the sort icon in the upper left corner:
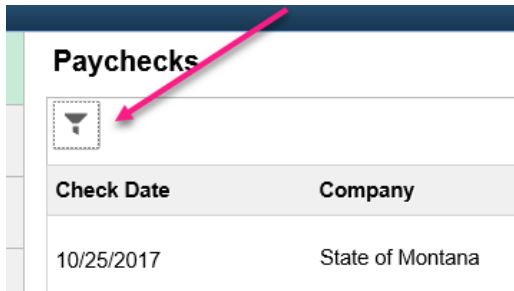
This will present a filter by date that can be changed:
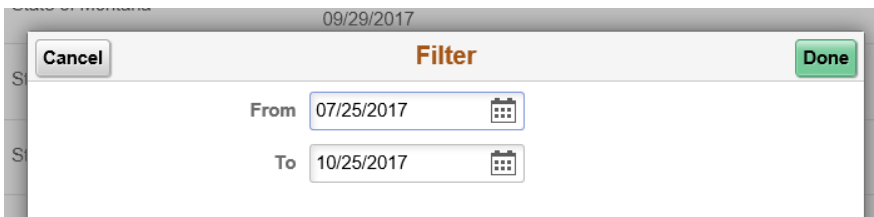
When dates have been selected, click "Done". Cancel will retain the original dates.

Select the paycheck to view. This will pull up the PDF version and you will see the Great Seal of the State of Montana, paycheck information is located below.

Direct Deposit

You can edit, add, and delete your direct deposit information from self-service at any time. Changes and additions to direct deposit information (bank routing numbers, account numbers, or account types) do not take effect automatically; they must first incur a "pre-notification" process, which may take up to two pay periods.

Direct all questions regarding direct deposits and the pre-notification process to your agency HR/payroll staff.

Navigation: Classic Home tile >Main Menu > Self-Service > Payroll and Compensation > Direct Deposit

Edit a direct deposit

Note: Multiple direct deposit changes are not allowed in the same day. This includes changes made to your Pay Statement Print Option (suppressing advice/stub) as discussed earlier in this guide.

1. Locate the row in which the direct deposit you wish to edit is located.

2. Click the Edit button.

3. Select the desired option from the Direct Deposit Account Type drop down list and/or type the correct information over the existing information.

4. Click the Save button to save the change.

Add a direct deposit

1. Click the Add button.

2. Select the appropriate Direct Deposit Account Type from the drop-down field.

3. Enter your bank's 9-digit Routing Number and your bank account number.

When a valid 9-digit Routing Number is entered, the name of the bank will display. Use the 9-digit Routing Number off your check or other documentation received directly from your financial institution (DO NOT enter numbers off of your deposit slip).

4. Select the appropriate Direct Deposit Type from the drop-down.

If you wish to deposit your entire check into one account, choose "Balance" and skip to step 6. If you wish to split your paycheck into one or more account types choose "Amount" and jump to the next step. (you will also have to complete the Add a direct deposit step for each additional account). When the Direct Deposit Type selected is "Amount," the priority number will default. If the Direct Deposit Type selected is "Balance," the Amount and Deposit Order fields will disappear (this is because they are not required).

5. The amount box will display only when you have selected a Direct Deposit Type of "Amount." Enter an amount to be deposited into the specified bank account. Skip this step if you choose "Balance" in the previous step.

6. Enter a deposit order in the Deposit Order field if you will have more than one direct deposit.

The Deposit Order determines the order the direct deposit requests will be taken from your net paycheck. Direct Deposit requests that are for specific amounts are withheld first, followed by the Balance request.

7. Click the save button to save your request.

8. Click the OK button.

You will be returned to the main Direct Deposit page. From there you can add additional deposits if necessary.

Delete a direct deposit

IMPORTANT: if you are adding a new account to replace an old account, follow the steps to add the new direct deposit information first, and then delete the old account. By deleting all accounts first, the system will not allow you to enter a new account until the following day.

1. Click the Delete button.

2. Click the Yes-Delete button to delete the account.

Training Summary

You can review a summary of any of your internal and external training that has been tracked by the state. Keep in mind, not all training is tracked by the state. Only training that has been entered into SABHRS HR will display in your training summary area. Each agency manages employee training differently; contact your agency HR/payroll office for questions about your training summary.

Navigation: Classic Home tile > Main Menu > Self-Service > Learning and Development > Training Summary

The Internal Training table displays training offered by or at the State of Montana:

1. Select the name of the training course in the Course Name column to view course details (if available).

The Other Professional Training table lists all other professional training entered into SABHRS HR.

Benefits

Initial benefit elections are processed through the Benefit Details tile. **Navigation: Classic Home tile > Main Menu > Self-Service > Benefits > Benefits Enrollment.**

Subsequent benefit elections, during the annual change period (every fall) are made online via Self-service. The Health Care and Benefits Division (HCBD) communicates information about benefits elections to employees closer to the annual change period. Contact HCBD for more information about benefit elections and all other insurance benefit related information such as well as medical, prescription, dental, life, and other related benefits and plans: http://benefits.mt.gov/.

You can review your benefit elections in SABHRS Self-Service anytime using the Benefits Summary page.

Navigation: Classic Home tile > Main Menu > Self-Service > Benefits > Benefits Summary

1. Enter the date you wish to view the benefits "as of" in the field and click the Go button (the date defaults to today's date).

2. Click on the benefit hyperlinks for specific details.

Manager Self-Service
Manager search options

Navigation: Classic Home tile > Main Menu > Manager Self-Service >Time Management> Manager Search Options

Manager search options should be set to limit the amount of information a manager sees on the Time Management pages where there is an Employee Selection Criteria option. For example, your agency HR/payroll staff has given you access to see multiple groups of employee timesheets; however, you are responsible for supervising only one of those groups. To limit the employee timesheets that you see each time you search for timesheets to the group of employees you supervise you should enter their "Time Reporter Group" in the time reporter group field. You can set the time reporter group to default into the field automatically (rather than you having to manually type it into the field each time). Other criteria can be set as the default from this page as well.

1. Locate the Loading of Matching Employees box/area: click the radio button next to 'Auto Populate' Results if you have security to a small number of employees. Otherwise select the radial named 'Prompt for Results'. This will ensure your search page does not time out. However, it will require you to click the Get Employees button on your Manager Timesheet Search page. Note: We recommend you use the 'Prompt for Results'.

2. OPTIONAL: The Default Criteria Presentation box/area determines whether the criteria list on the Time Management search pages is visible (expanded) or collapsed. Choose your preference by clicking the appropriate radio button.

3. OPTIONAL: Enter into the Selection Criterion Value field the criteria you wish to show up as the default each time on the search pages.

4. OPTIONAL: Checking the box next to the item in the Include in Criteria column will include the item as search criteria on the search page (as a general rule you should check all visible boxes).

5. OPTIONAL: Check or uncheck the Show Schedule Information box to either show the employees schedule or not include it on the search pages.

6. OPTIONAL: The Include in List check box determines the fields the manager sees when the employee list is displayed. Select the value in the dropdown menu to choose how you want that field information to be displayed.   As a Manager you can choose from the following values: choose to Do not include, Include, Include Description Only, Include Code Only, or Include Code and Description.

☑ Show Schedule Information

▼ Employee Selection Criteria ⊙

Description	Selection Criterion Value	Include in Criteria	*Include in List
Time Reporter Group	🔍	☑	Do Not Include
Employee ID	🔍	☑	Include
Empl Record	🔍	☑	Include
Last Name	🔍	☑	Include
First Name	🔍	☑	Include
Department	🔍	☑	Include Description Only
Reports To Position Number	🔍	☑	Include Code Only
Location Code	🔍	☑	Include Code and Description

▼ Data Loading in Time Management ⊙

Folder	Portal Label	*Chunk Size

🖫 Save

Do Not Include –The search results does not include this field's value when this option is chosen.
Include Description Only –Above this value was selected for Department. The search will return the value's description rather then the code. For this employee the departments description SPD Payroll is returned rather then the department code of 61123PAYRO.
Include Code Only – Above the Reports To Position has this value selected. In the search results the system returns the reports to value of 61100050 with no description. If we had asked for the Description to be included. The system would have returned the description of the position number listed as the reports to for this employee which would have been Human Resources Manager.
Include Code and Description – Above the Location Code search has this value listed. The search results lists the location code and the location code description.
Data Loading in Time Management is not currently being used.

7. Click the Save button to save any changes.

Approving and editing time

When an employee submits time in self-service, the person listed as the employee's "reports to" in SABHRS will be responsible for approving the employee's time. In some agencies, the "reports to" is the employee's manager or supervisor; in other agencies the "reports to" is another designated person. Check with your agency's HR/payroll office if you have questions about the "reports to."

Separate time approval instructions for time approvals related to delegation can be found in the Delegating time area of this guide.

Time approval navigation for approval by a "reports to:"
Navigation: Classic Home tile > Main Menu > Manager Self-Service >Time Management> Report Time > Timesheet

Time approval navigation for approval by a "proxy" via delegation:
Navigation: Classic Home tile > Main Menu > Manager Self-Service > Time Management > Approve Time & Exceptions > Reported Time

1. Click the Get Employees button to return a list of employee timesheets based on the criteria entered in the Employee Selection Criteria table.

    If desired, update or change any search criteria before clicking the button.

2. Change the View By drop-down field and Date field if necessary.

    A list of employees matching the search criteria is returned. Note that the information displayed next to the employee(s) is based on the active selections in the View By drop-down menu, the Date field on the page. For example, if "Week" is in the View By drop-down only one week's worth of time is displayed. You can see how much time has been reported, needs to be approved, or has been approved by looking at the relevant columns next to the employee's name. Note: Demographics and the field values next to each employee is controlled by the Manager Search Options.

    __Important Reminder:__ All time may not be in a submitted Needs Approval status. Some of the time may be in a Saved status. If so, notify the employee there is still time needing to be submitted for approval. If the employee is unable to submit time Check with your Agency HR/Payroll staff for your Agency Policies and Procedures regarding submitting the time on their behalf in their absence.

    In addition, pay special attention to the Date listed in the date field. The recommendation is to include the beginning of the pay period for which you are approving time in the date field.

3. Click on an employee's Last Name to display their timesheet.

    Be sure to check the information entered on the timesheet is correct.

4. OPTIONAL: Edit any information on the employee's timesheet. As a "reports to" you have the ability to edit or add information to the employee's timesheet just as you would on your own timesheet. Click the Submit button, then the OK button after making any changes/additions.

5. Select the time you wish to approve by locating the Reported Time Status table and checking the box next to the time to be approved.

Alternately, use the Select All and Deselect All hyperlinks at the bottom of the table to select or deselect all of the boxes.

6. Click the Approve button to approve the time.

You can return to the timesheet to approve additional time if necessary (the system does not require you to approve all time at once; however, you should check with your agency's HR/payroll office to determine by when all time must be approved).

7. Click the Yes button.

8. Click the OK button.

9. OPTIONAL: click the Previous Employee and Next Employee hyperlinks in the upper right-hand corner to navigate to other employee timesheets, or click the Return to Select Employee hyperlink at the bottom of the page to return to the timesheet search page to search for a different employee.

Common time reporting codes

This is not a complete list of time reporting codes. Sometime reporting codes are not available to all employees as they are unique to specific agency business processes. Obtain the most recent time reporting codes for timesheet reporting from your agency's HR/payroll office.

Time Reporting Code	Description
REG	Regular hours worked
HOL	Holiday
SLT	Sick Leave Taken
VLT	Vacation Leave Taken
ECE	Exempt Comp Time Earned
ECT	Exempt Comp Time Taken
CTE	Non-Exempt Comp Time Earned
NCT	Non-Exempt Comp Time Taken
OVT	Overtime
HWK	Holiday Worked - 1.5 Times
HBK	Banked Holiday Earned
HBT	Banked Holiday Taken
R1106	Military Leave

FMLA time reporting codes

TRC Code	Description	When to Use
FBHNT	FMLA Holiday Bank NG Taken	When you use Banked Holiday Non-grandfathered leave time as FMLA
FBHTX	FMLA HolidayBankNGTakenNoExp	When you use non-paid Banked Holiday Non-grandfathered leave time as FMLA. Agency will inform you when required to use an "NX" code on your timesheet.
FECT	FMLA Exempt Comp time taken	When you use Exempt Comp time as FMLA
FETNX	FMLA Exempt Comp time taken No Expense	When you are using non-paid Exempt Comp time as FMLA. Agency will inform you when required to use an "NX" code on your timesheet.
FHBT	FMLA Holiday Bank taken	When you are using paid Banked Holiday time as FMLA
FHOL	FMLA Holiday Pay	When you are out on FMLA leave for the entire week which includes a paid holiday. This code will not be used if you are on intermittent FMLA leave.
FHTNX	FMLA Holiday Bank taken No Expense	When you use non-paid Banked Holiday time as FMLA. Agency will inform you when required to use an "NX" code on your timesheet.
FLWOP	FMLA Leave without pay	When you are taking FMLA without vacation, comp time, or sick time pay
FNCNX	FMLA NonExempt Comp No Expense	When you are using non-paid Non-Exempt Comp time as FMLA. Agency will inform you when required to use an "NX" code on your timesheet.
FNCT	FMLA NonExempt Comp Taken	When you use Non-Exempt Comp time as FMLA.
FSCNX	FMLASeaslNonExemptComp - NoEx	When you are using non-paid Non-Exempt Comp time as FMLA and you are a *seasonal* employee. Agency will inform you when required to use an "NX" code on your timesheet.
FSLFT	FMLASickLeaveFundTaken	When an employee on **FMLA** uses hours from the **Sick Pool**
FSLGT	FMLASickLeaveGrantTaken	When an employee on **FMLA** uses hours **Direct Grant** hours
FSLT	FMLA Sick leave taken	When you are using sick time for FMLA
FSNCT	FMLA Sea NonExempt Cmp Tkn	When you are using Non-Exempt Comp time as FMLA and you are a *seasonal* employee.
FSST	FMLA *Seasonal* Sick leave taken	When you are a *seasonal* employee using sick time for FMLA
FSTNX	FMLA Sick leave taken No Expense	When you are using non-paid sick time for FMLA
FSVLT	FMLA *Seasonal* Annual leave taken	When you are a *seasonal* employee using vacation or annual leave time for FMLA
FVLT	FMLA Annual leave taken	When you are using vacation or annual leave for FMLA
FVTNX	FMLA Annual leave taken No Expense	When you are using non-paid vacation or annual leave for FMLA