



This guide will help you determine when you need to use the T&A Transaction Request Form.

Key	
✓	If the data in this cell is changing, complete a T&A Transaction Request Form only .
+	If the data in this cell is changing, complete both a T&A Transaction Request Form and the appropriate HCM template.
X	If the data in this cell is changing, do not complete a T&A Transaction Request Form. For info on which HCM Template to use, refer to the <i>Smart HR Templates Job Aid</i> on the HCM Portal. Location: <i>HCM Portal Home > HCM Job Aids > HCM User Job Aids > Smart HR Templates</i>

Part I: Employee Information

Agency Code X	Agency Name X	Effective Date X
Last Name X	First Name X	MI X
	Suffix X	Last 4 SSN X
	Employee ID # X	Email Address X
Work Location X	Supervisor's Last Name X	Supervisor's First Name X
	MI X	Suffix X
	Non BSC State Supervisor? <input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
Veteran Status <input checked="" type="checkbox"/> Non-Vet <input checked="" type="checkbox"/> Veteran	Former Reservist <input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Timesheet Cycle <input checked="" type="checkbox"/> Administrative <input checked="" type="checkbox"/> Institution
Pay Basis - X	Dynamic Percentage <input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Negotiating Unit - X
Overtime Eligible <input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
State Service Information - X	Former State Agency X	

Part II: Schedule Information

Pass Days Week 1: <input checked="" type="checkbox"/> T <input checked="" type="checkbox"/> F <input checked="" type="checkbox"/> S <input checked="" type="checkbox"/> M <input checked="" type="checkbox"/> T <input checked="" type="checkbox"/> W Week 2: <input checked="" type="checkbox"/> T <input checked="" type="checkbox"/> F <input checked="" type="checkbox"/> S <input checked="" type="checkbox"/> M <input checked="" type="checkbox"/> T <input checked="" type="checkbox"/> W	Alternate Work Schedule ✓ <input type="checkbox"/> Function (as allowed with supervisor approval) <input type="checkbox"/> Schedule (formal approved schedule ex: 9/10 days, longer M-Th, leave early Friday) <input type="checkbox"/> Allow Bi-Weekly Totals (check for yes)	<input type="checkbox"/> Cancel AWS Function <input type="checkbox"/> Cancel AWS Schedule
Start Time : ✓ <input type="checkbox"/> a.m. <input type="checkbox"/> p.m.	End Time : ✓ <input type="checkbox"/> a.m. <input type="checkbox"/> p.m.	Lunch Required <input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No
	Clock User - ✓	Clock User ID Card # ✓
TDS Tab Required <input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No	TDS Type <input checked="" type="checkbox"/> By Day <input checked="" type="checkbox"/> TDS by Percent	TDS Liaison Contact X

Part III: Leave Information

Action <input type="checkbox"/> New <input type="checkbox"/> Extension <input type="checkbox"/> Rein-Leave	Dates Affected First Date of Absence: Anticipated Return to Work Date:	Type of Leave <input checked="" type="checkbox"/> Child Care <input checked="" type="checkbox"/> FMLA <input checked="" type="checkbox"/> FMLA Family <input checked="" type="checkbox"/> Worker's Comp. (complete III.A) <input checked="" type="checkbox"/> Disciplinary Leave <input checked="" type="checkbox"/> Administrative Leave with Pay <input checked="" type="checkbox"/> Leave Donation Recipient <input checked="" type="checkbox"/> Leave Donation Donor (complete III.B) <input type="checkbox"/> Other Specify →
Order to Charge/Deduct Accruals (select order for each) - Personal - Vacation - Holiday - Floater - Non-Comp - VRWS - Sick Leave - LWOP		

Part III.A: Restoring Accruals Due to Worker's Compensation Injury

Date of Injury X	Accident Report # X	Body Part Injured X
Restore Accruals ✓ AL: _____ PL: _____ SL: _____ HL: _____ FL: _____	Begin Charging Accruals on: ✓	Place on SLHP Beginning: ✓
		Place on SLNP Beginning: ✓

Part III.B: Leave Donation

Donor's N # ✓	Date of Donation ✓	# Days Donated ✓	Recipient Name ✓	Cross Agency Donation Agency ✓
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Each employee receiving leave donations needs this form filled out on their behalf. If multiple employees are donating time to the same receiving employee, you may use the BSC Time and Attendance Transaction Spreadsheet instead.

Part IV: Timekeeper/Delegate

Delegate Functions (A delegate reviews assigned timesheets prior to the supervisor approving a timesheet.)	Timekeeper Functions (A Timekeeper can access the employee's timesheet and complete hours worked/charges on behalf of the employee.)
<input checked="" type="checkbox"/> Employee Needs a Delegate	<input checked="" type="checkbox"/> Employee Needs a Timekeeper → Who will be the Delegate/Timekeeper for the employee? ✓
<input checked="" type="checkbox"/> Employee Will Be a Delegate	<input checked="" type="checkbox"/> Employee Will Be a Timekeeper → The Delegate/Timekeeper will be for the following employee: ✓
<input checked="" type="checkbox"/> Remove Delegate(s)	<input checked="" type="checkbox"/> Remove Timekeeper(s) → Names of individuals to remove: ✓
	Is this request leave related? <input type="checkbox"/> Yes <input type="checkbox"/> No

Part V: LATS Roles Required

Add	<input checked="" type="checkbox"/> Personnel View	<input type="checkbox"/> TDS Coordinator	for	<input type="checkbox"/> Entire Agency	Division	Bureau	Section
	<input type="checkbox"/> Reports Access	<input type="checkbox"/> Leaves Timekeeper		<input type="checkbox"/> Specific Div-Bur-Sect			
Remove	<input checked="" type="checkbox"/> Personnel View	<input type="checkbox"/> TDS Coordinator	for	<input type="checkbox"/> Entire Agency	Division	Bureau	Section
	<input type="checkbox"/> Reports Access	<input type="checkbox"/> Leaves Timekeeper		<input type="checkbox"/> Specific Div-Bur-Sect			