THE UNIVERSITY of EDINBURGH

People and Money system

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Timekeeper Guide- How to Manage Timecards

Contents

For more detail on the business process around Timecards including a glossary of terms and an explanation of roles involved in the process, please see the Guide to Time Recording.

Introduction

The Timekeeper role has been created to allow administrators to monitor and intervene in the Timecard process if and when necessary. It is not mandatory for Timekeepers to be involved but they may wish to be to ensure data quality and completeness.

Timecards must be submitted and fully approved/submitted by Line Managers or Timekeepers by the 10th of the month for payment to the employee on the 28th of that month (except for December when the cut off will be earlier)

Once the timecard has been approved/submitted for payment, the Payroll team have further work to undertake, including data loads and checks, before the timecard is 'transferred ready for payment', which takes place on 20th of the month for payment to the employee of the 28th of the month.

Viewing approved/submitted timecards
Employees, line managers and timekeepers can view timecards, which have been approved/submitted for payment to Payroll at any time, including the time between approval/submission and the time at which Payroll transfers the hours as ready for payment.

It is vital however, that once you have viewed the timecard, you press the 'Cancel' button. By cancelling, you will exit out of the screen without changing the status of the timecard and the timecard will be paid as expected. If the user exits the screen by pressing the 'Submit' button, the timecard status will change back from approved to submitted and will go back through the approval workflow, even if there has been no change made to the record. This will prevent the timecard from being paid as expected.

Editing a timecard.
If the employee, line manager or timekeeper **edits** a timecard, between 11th and 20th inclusive of each month, the full timecard will need to go back through the approval workflow. If the timecard is not re-approved, this will prevent the original hours on the timecard, which had previously been submitted/approved, from being transferred for payment as originally actioned. Such edits and approvals, during that time, would also mean that the hours originally approved for payment in that month would have effectively missed the deadline for payment in that month.

A timecard freeze on editing between 11th and 20th inclusive of each month has been put in place (apart from December when this will be earlier). Please note, the system will not prevent you from editing in this period, therefore please take care. **This means employees, line managers and timekeeper must not edit the approved timecard before it has been transferred for payment**. For example, January timecards approved/submitted by cut-off on 10th February, should not be edited between the 11th and 20th February inclusive to ensure payment on 28th February.

Please review the Pay Dates and Deadlines webpage for timecard submission deadlines.

Notes

Timekeepers have access to input Timecards for employees. It is only possible for a Timekeeper to enter one Timecard at a time; there is no bulk load functionality. All employees have access to input Timecards via self-service and should be encouraged to do so.

If a timecard is rejected by the Line Manager, the employee or timekeeper will be able to amend this and resubmit before the 10th of the month, without starting the entire process again.

Timekeepers can 'save' a timecard throughout the month and submit once all time has been entered and by the last day of the month. can be saved (rather than submitting) if you wish to input time throughout the month. Managers do not receive notifications to approve a Timecard that has been submitted by a Timekeeper.

An employee can save a timecard (instead of submitting) to allow timekeepers to review, edit and submit on their behalf. If a school/department would like their employees to do this, they will need to communicate this to ensure employees know before submitting any timecards. Likewise, a timekeeper can enter and save a timecard to allow someone else (another timekeeper) to double check before it is resubmitted and flows through the process to payroll.

It is not possible to submit a Timecard with a negative number of hours on it. If you need to do this because an employee has previously submitted too many hours and they have been overpaid, you will need to go back to the month which had the overpayment and edit this to reflect the correct amount.

If the employee is ending their employment with the University, the Timecard must be submitted **before** their last day of employment, to make sure that they are paid correctly. In exceptional circumstances, where the line manager/ timekeeper as been unable to do this, the Guaranteed Hours – Final timecard form should be completed.

In Brief …

Timekeepers have access to input Timecards for employees. It is only possible for a timekeeper to enter one Timecard at a time.

1. From the Homepage, under the **My Client Groups** tab, click **Show More** at the bottom of the Quick Actions.
2. Under the **Time** section, click **Team Timecards**.

3. Click **Add**

4. Search for the employee you wish to add a Timecard for, or select one of your direct reports (if you have any)

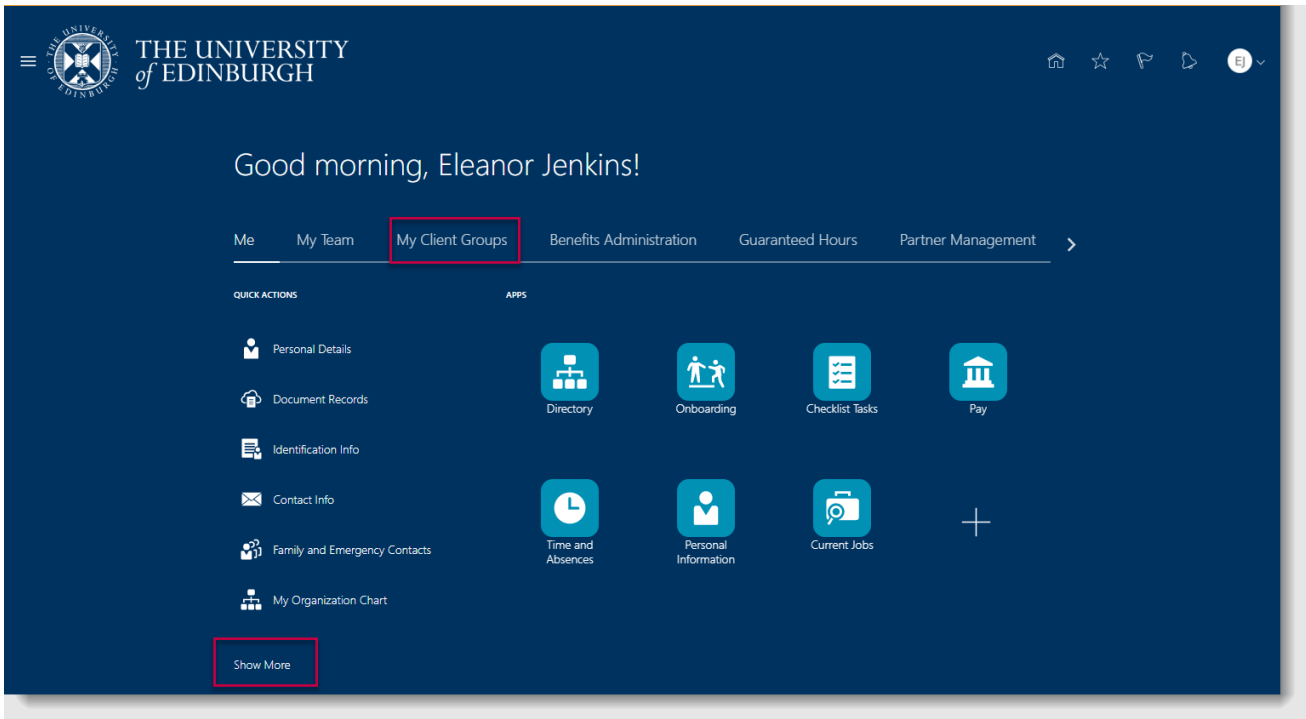
5. Select the date for the Timecard period and click the **Add** button in the Entries section

6. Complete the relevant fields and click **OK** button.

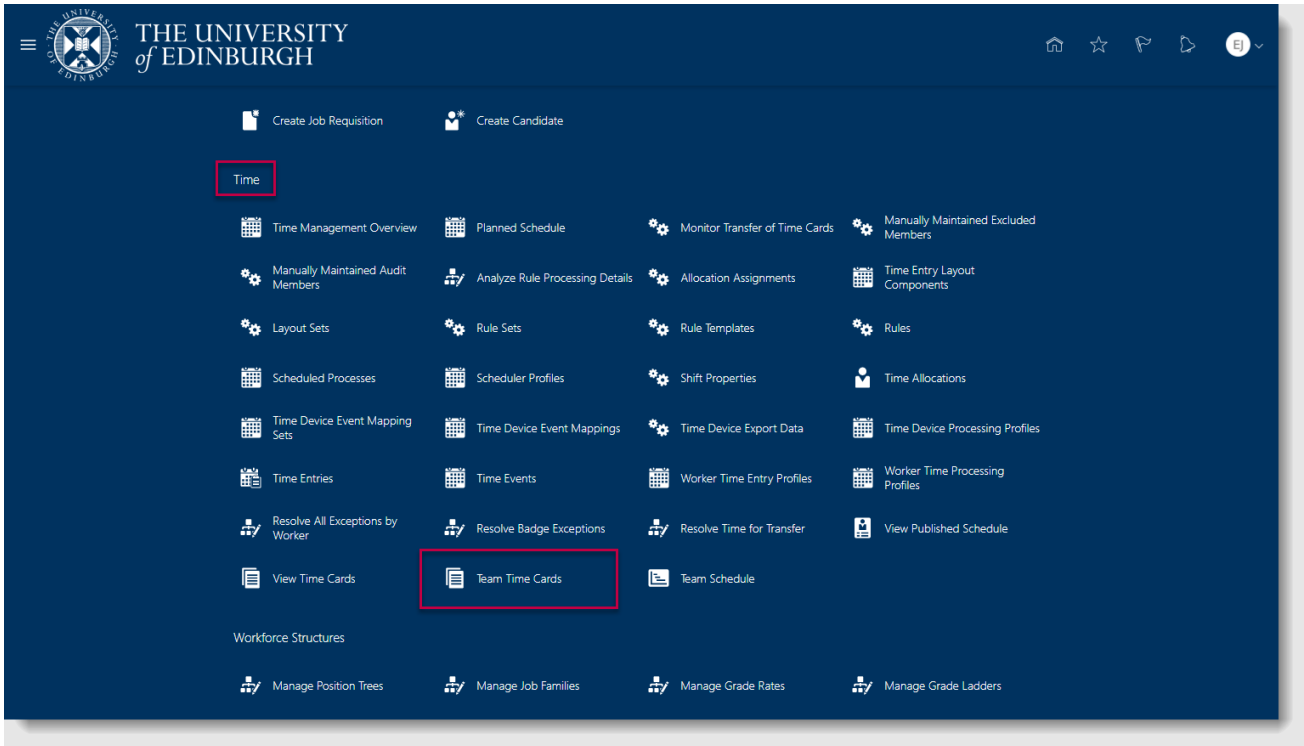
7. On the **Add Timecard** screen, click **Submit** at the top right.

In Detail ...

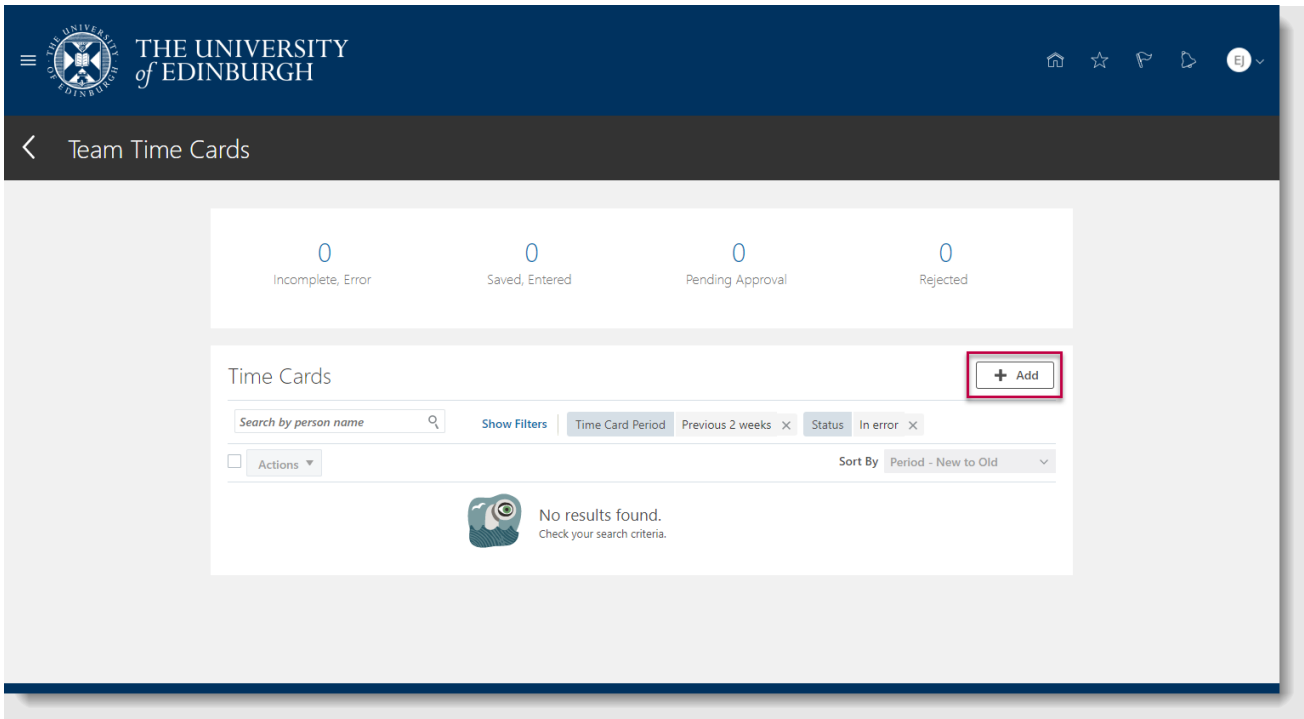
1. From the Homepage, click the **My Client Groups** tab. Scroll down and at the bottom of the **Quick Actions**, click **Show More**.



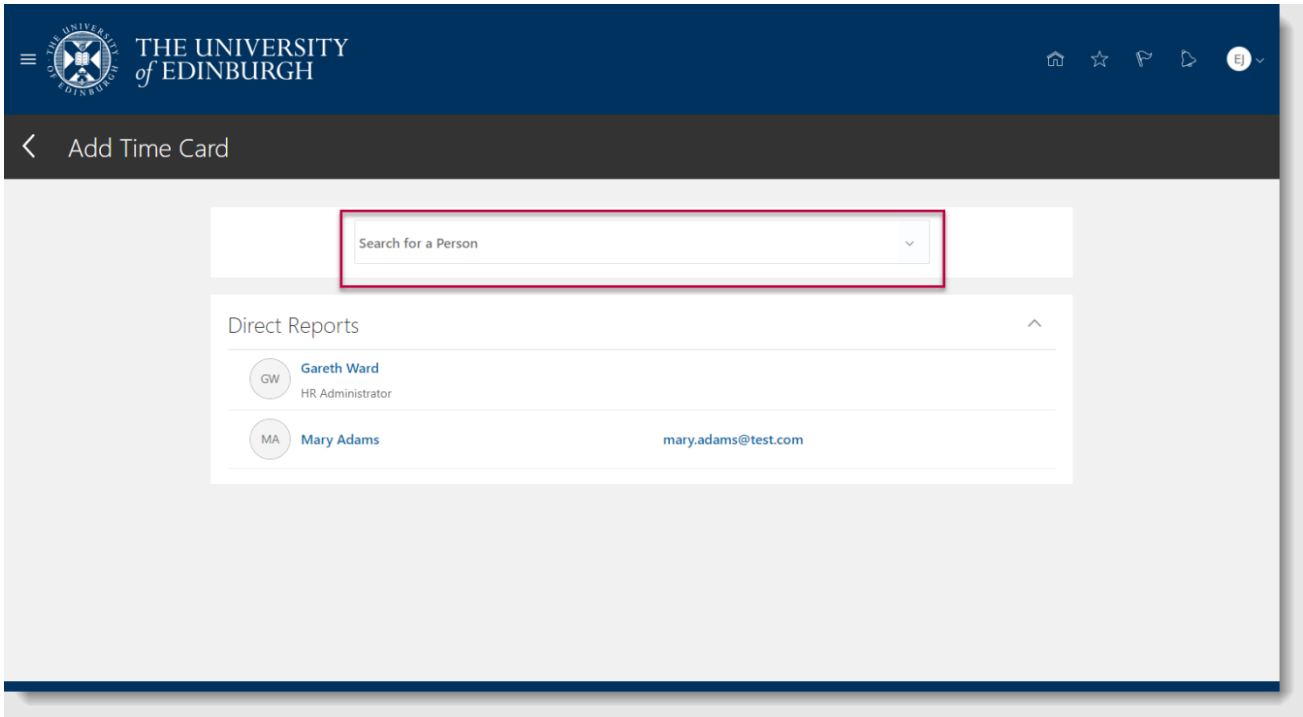
2. Scroll down until you see the **Time** section, click **Team Timecards**.



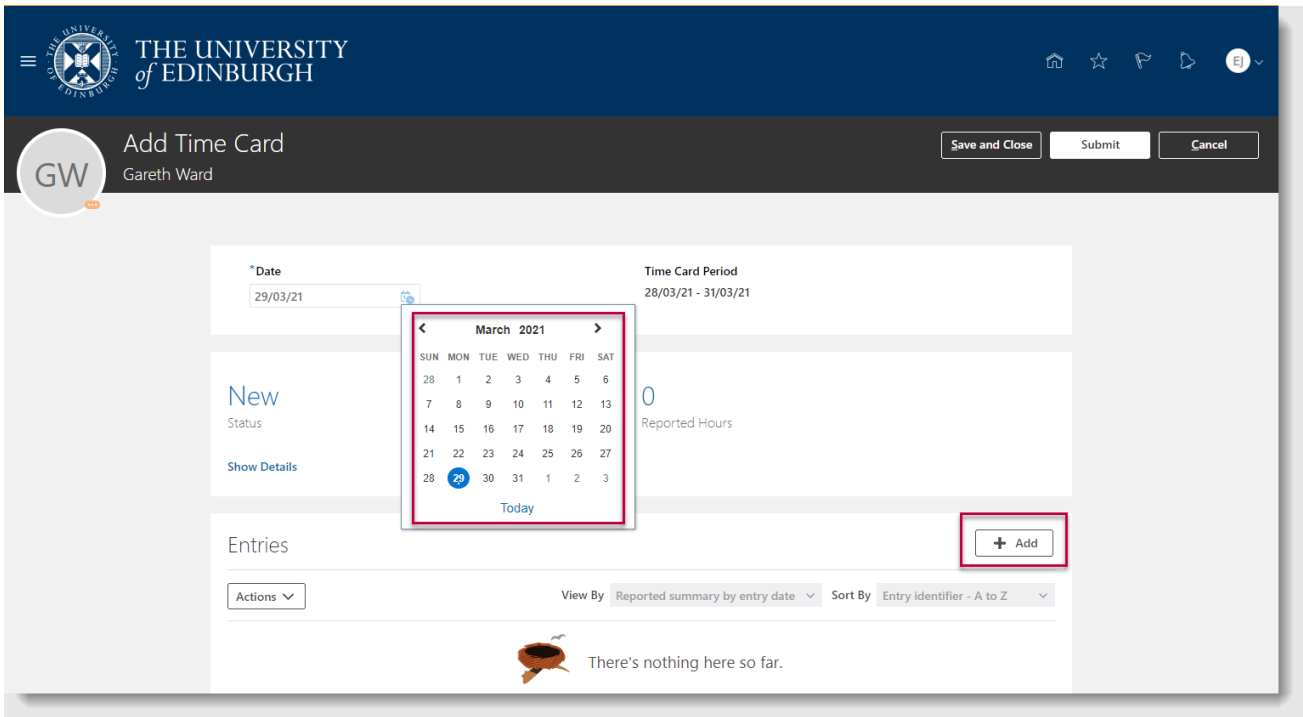
3. Click **Add.**



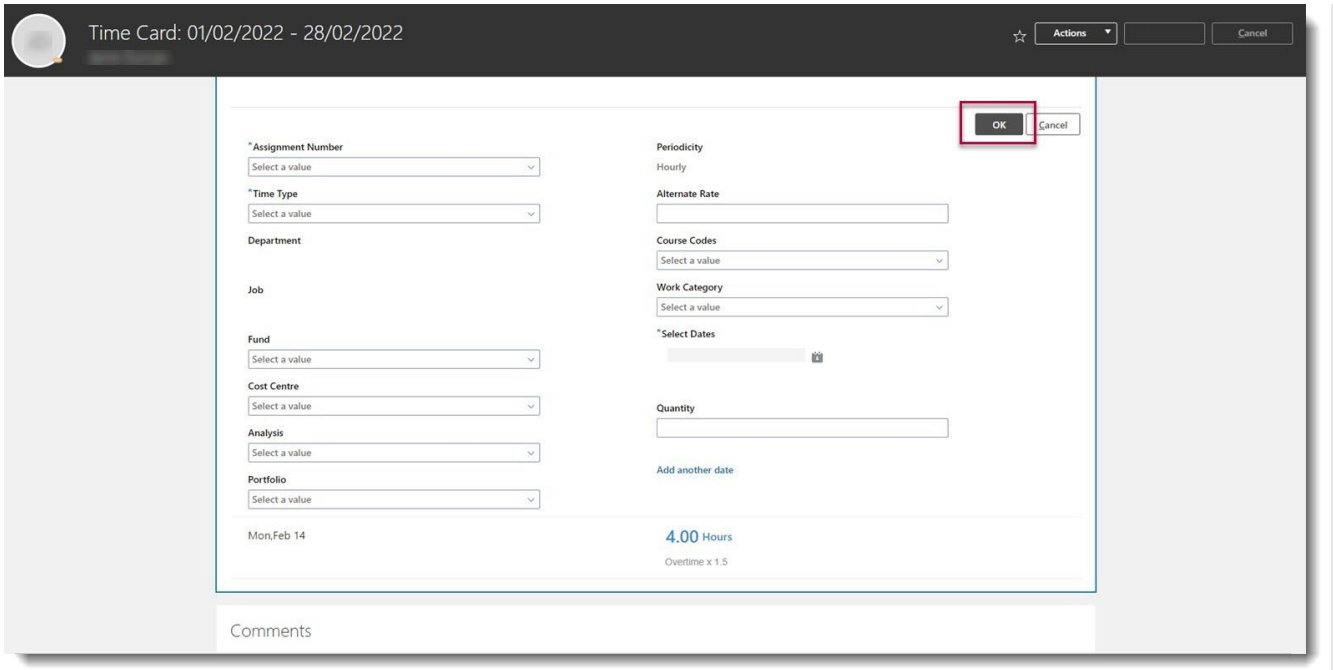
4. Search for the employee you wish to add a Timecard for or select one of your direct reports (if you have any).



5. Select the date for the Timecard period and click the **Add** button in the Entries section



6. Complete the relevant fields and click **OK**.



a. **Assignment Number**- Mandatory field that refers to the employee's work assignment (job). If they only hold one assignment with the university this is their employee number. If they hold multiple assignments, each assignment has a number (normally the employee number with eg: a – 2 or 3 at the end) Please ensure you use the correct number to ensure they are paid at the correct rate of pay for the work completed.

b. **Time Type**- Mandatory field. Refers to the type of hourly based payment to be made. Full list as follows:

Overtime x0.5
Overtime x1
Overtime x1.2
Overtime x1.5
Overtime x2
Guaranteed Hours
Call Out
Additional Hours
Premium Band Overtime
Intern Hours
Union Duties

You will only be allowed to submit a Timecard for the type of time which the employee is eligible (error will appear upon submission). For more information on eligibility please refer to the Guide to Time Recording More information on when each type of Overtime should be applied can be found in the appropriate Conditions of Service document.

c. **Department**- Auto-filled field based on Assignment Number.

d. **Job**- Auto-filled field based on Assignment Number.

e. **Funds -** This field only needs completed if costs are to be allocated to different codes from your assignment, e.g,General unrestricted.

f. **Cost Centre**- Optional field. If you are unsure of what to put, just leave this field blank. Will normally only apply when you have worked in a department that is not the one that your contract of employment relates to.

g. **Analysis -** With additional information this may be used for local reporting.

h. **Portfolio**- Optional field that contains a list of values that refers to buildings where the work has been undertaken. This will only be applicable to non-academic positions, such as catering staff. Please complete this wherever possible.

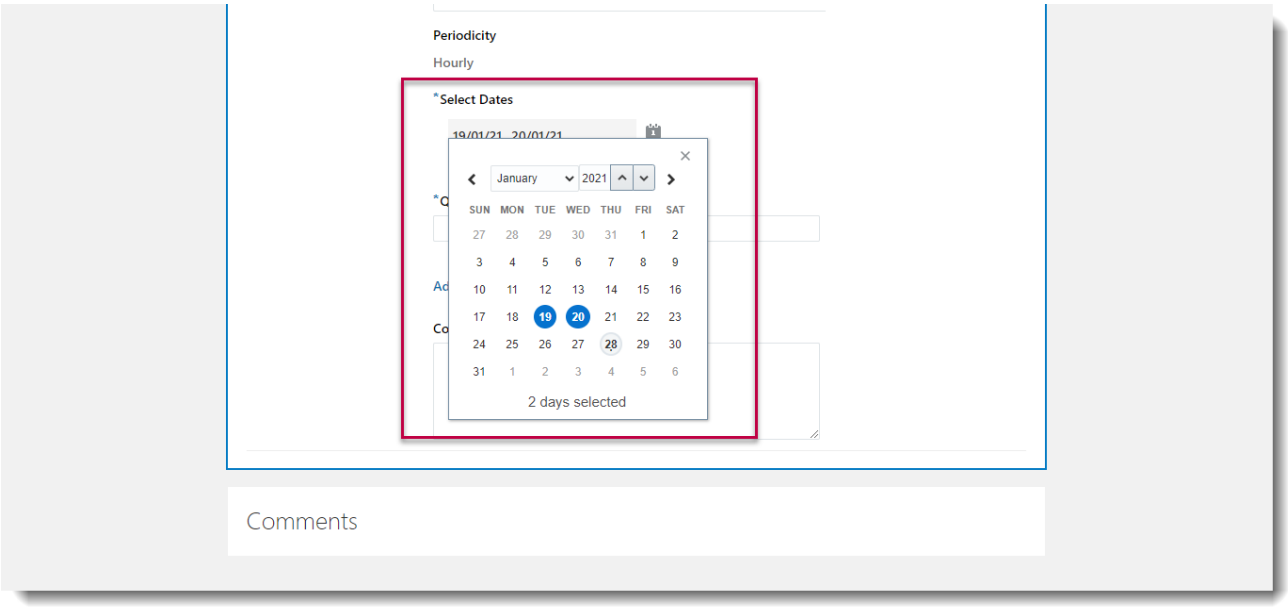
i. **Alternate Rate**- Optional textbox that is to be used ONLY on the occasion that the employee completes work where they would be paid at a different rate to the normal rate of pay for the assignment. Value should be entered as numeric value with 2 decimal places, e.g. enter 10.00 to pay £10 per hour. **You should only use this field if it has been previously agreed that the work done is to be paid at a rate that is different to the normal contracted rate of your assignment. Otherwise, leave it blank.** Refer to the part time pay scales on the university website to convert a grade and scale point to a numeric value.

j. **Course Code**- Optional field that contains a searchable list of values that refer to specific academic courses. This will only be applicable to academic positions. If the work done was in relation to a specific course, please complete this wherever possible.

k. **Work Category**- Optional field that contains a list of values that refer to the type of work done. Please complete this wherever possible. Full list is as follows:

   i. Teaching
   ii. Tutoring
   iii. Tutor: Honours
   iv. Demonstrating
   v. Lecturing
   vi. Marking

vii. Other Work Types
viii. Preparation Time
ix. Development
x. Absence
xi. Sickness
xii. Research

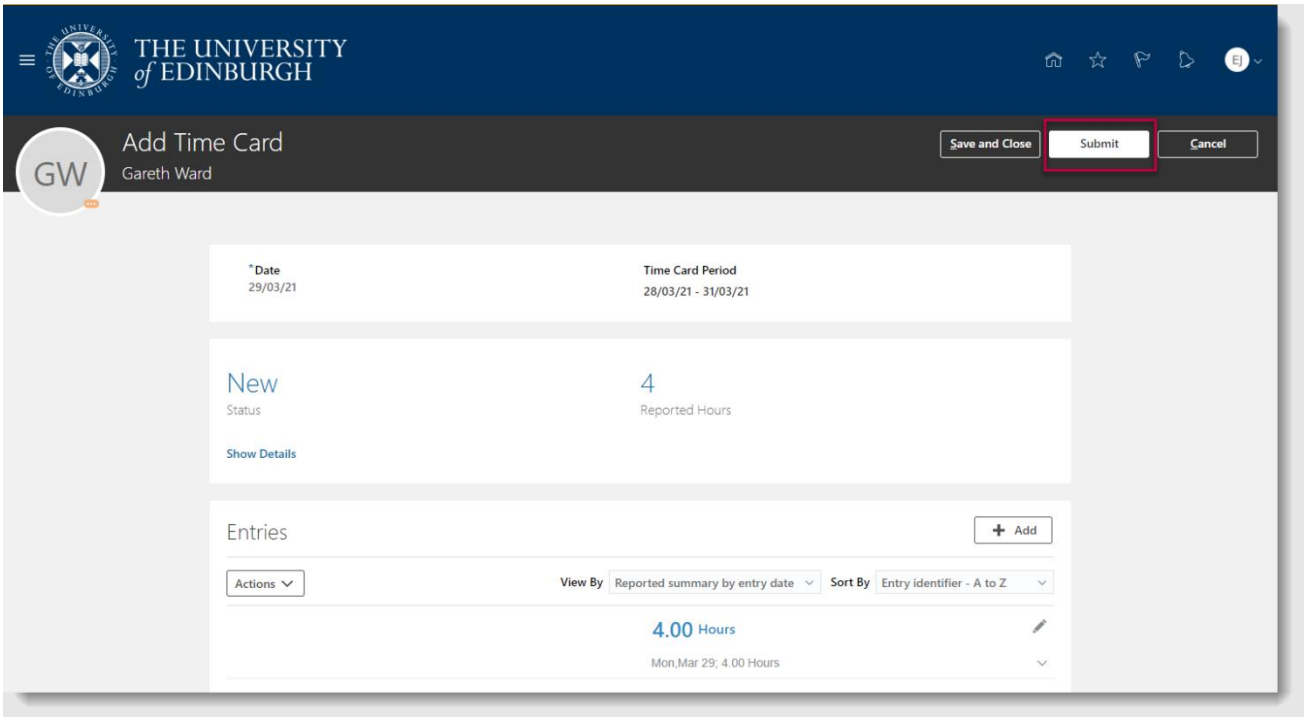


Select Dates- Mandatory field that refers to the dates you are selecting for this Timecard. **Note**: multiple dates can be selected for one Timecard as displayed above but the hours field will refer to what was worked on one day of the multiple days selected. E.g.: if 2 days are selected and 4 hours entered into the quantity box, 4 hours will appear on each of those 2 days.

It is not possible to enter hours over a time period of more than a day eg: 20 hours over a week or a month. Hours must be allocated to a specific day, and must accurately reflect the hours worked by the employee on that day.

l. **Quantity** - Required field that refers to the number of hours worked per day on the selected date(s).

7. Comments can be added to a Timecard but there is only one free text box available for each Timecard (ie: month). Any applicable extra information should be added there to aid with reporting.
8. On the **Add Timecard** screen, click **Submit** at the top right.



Monitoring Timesheet Data Entry and Submission

Notes

Timekeepers will not receive any system generated notifications or email in regards to Timecards.

Timekeepers can edit Timecards however, Approved Timecards should only ever be edited if there are extra hours to be added to it, i.e.: if someone forgot to submit all of their hours for the previous month(s). You can also edit a Timecard after it had been rejected by Payroll.

If an employee saves a Timecard instead of submitting it, this will allow Timekeepers to review, edit, and submit it on their behalf. If a school/department wishes for their employees to do this, they will need to communicate this in advance.

Likewise, a Timekeeper can enter and save a Timecard to allow someone else (another Timekeeper) to double check before it is submitted and flows through the process to payroll.

If a Timecard is submitted then rejected by the approver, the employee will receive a notification of this. This same Timecard can be amended and resubmitted by either the employee or the Timekeeper without starting the process again but must be submitted to payroll by the 10th of the month.

If a Timekeeper becomes aware that a Timecard has been approved but it has errors in it, they can ask the line manager or employee to delete the Timecard then they can start the

process again. **Note** that Timecards should never be deleted if the employee has already been paid for the time. If the Timecard has the status 'Approved' this means it has already been through payroll approval and may have already been processed for payment. In this situation Timekeepers may need to contact Payroll by submitting an SR to the Help Desk.

Timekeepers should closely monitor timecards in the period 1st to the 10th of the month, to identify timecards for the current month with the status 'submitted' as this indicates that the manager or timekeeper still need to approve/ submit the timecard. The timekeeper should check and submit these for payroll processing if appropriate by the 10th of the month.

Once line manager/ timekeeper has approved/ submitted the timecard and the payroll steps have been completed, the status will be "approved". It does not matter which order the approval steps occur.

Timekeepers will need to resubmit an employee's Timecard. This is because there is no way of filtering on which ones have just been submitted by the employee and which ones have also been approved by the line manager, as they will show as a status of submitted in both these situations. To ensure ALL Timecards have been approved and passed onto Payroll you must follow the steps in the next section - How to resubmit an employee's Timecard to pass it on to Payroll to resubmit the Timecards.

Viewing Approved/Submitted Timecards

Employees, line managers and timekeepers can view timecards, which have been approved/submitted for payment to Payroll at any time, including the time between approval/submission and the time at which Payroll transfers the hours as ready for payment.

It is vital however, that once you have viewed the timecard, you press the **'Cancel' button**. By cancelling, you will exit out of the screen without changing the status of the timecard and the timecard will be paid as expected. If the user exits the screen by pressing the 'Submit' button, the timecard status will change back from approved to submitted and will go back through the approval workflow, even if there has been no change made to the record. This will prevent the timecard being paid as expected. The system is working as designed, but those previously approved hours will now require another approval – in time for the next available payroll date - before they are paid. This means that hours approved

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A timecard freeze on editing between 11th and 20th inclusive of each month is in place (apart from December when this will be earlier). This means employees, line managers and timekeeper **must not** edit the approved timecard before it has been transferred for payment. For example, January timecards approved/submitted by cut-off on 10th February, should not be edited between 11th and 20th February inclusive to ensure payment on 28th February.

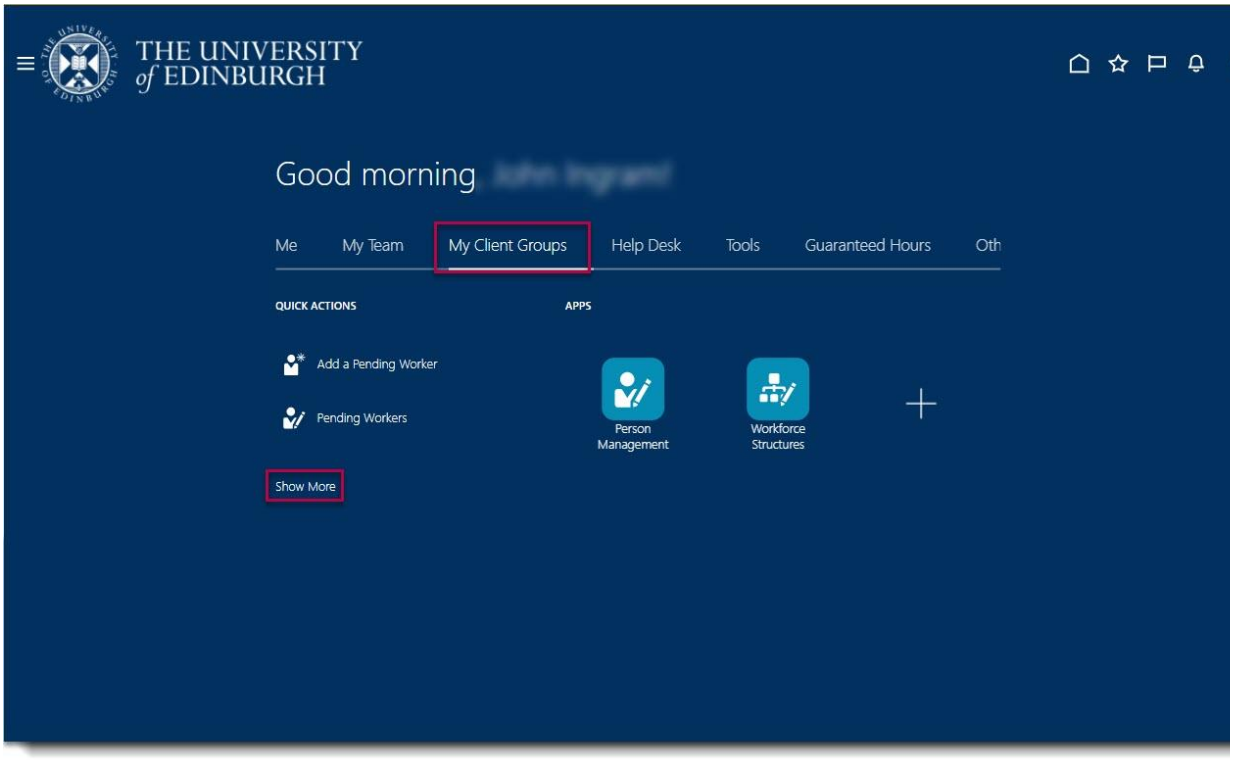
How to resubmit an employee's Timecard to pass it on to Payroll

In Brief

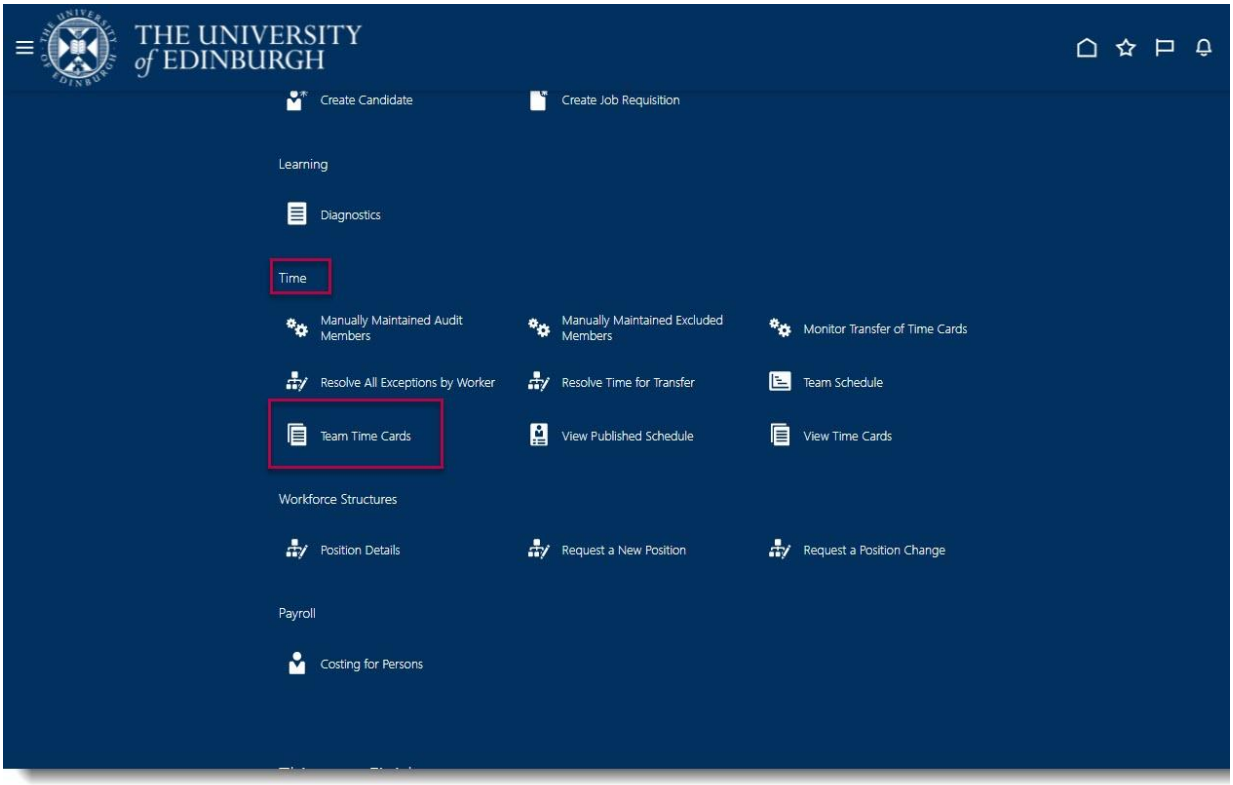
1. From the Homepage, under the **My Client Groups** tab, click **Show More** at the bottom of the Quick Actions
2. Under the **Time** section, click **Team Timecards**
3. Click on **Show Filters**
4. Select **date range** and status of **Submitted**. Can specify a Line Manager or/and Department
5. Click on the **+Add** button then search for the employee
6. Change date for the 1st of the previous month
7. Click on **Submit**
8. If you want to edit you can click on the **Pencil icon**
9. If you want to reject it, add a comment and click on **Actions** and **Save and Close.** Contact the employee to let them know that they need to correct the Timecard as per your comments, as the system will not notify them.

In Detail ...

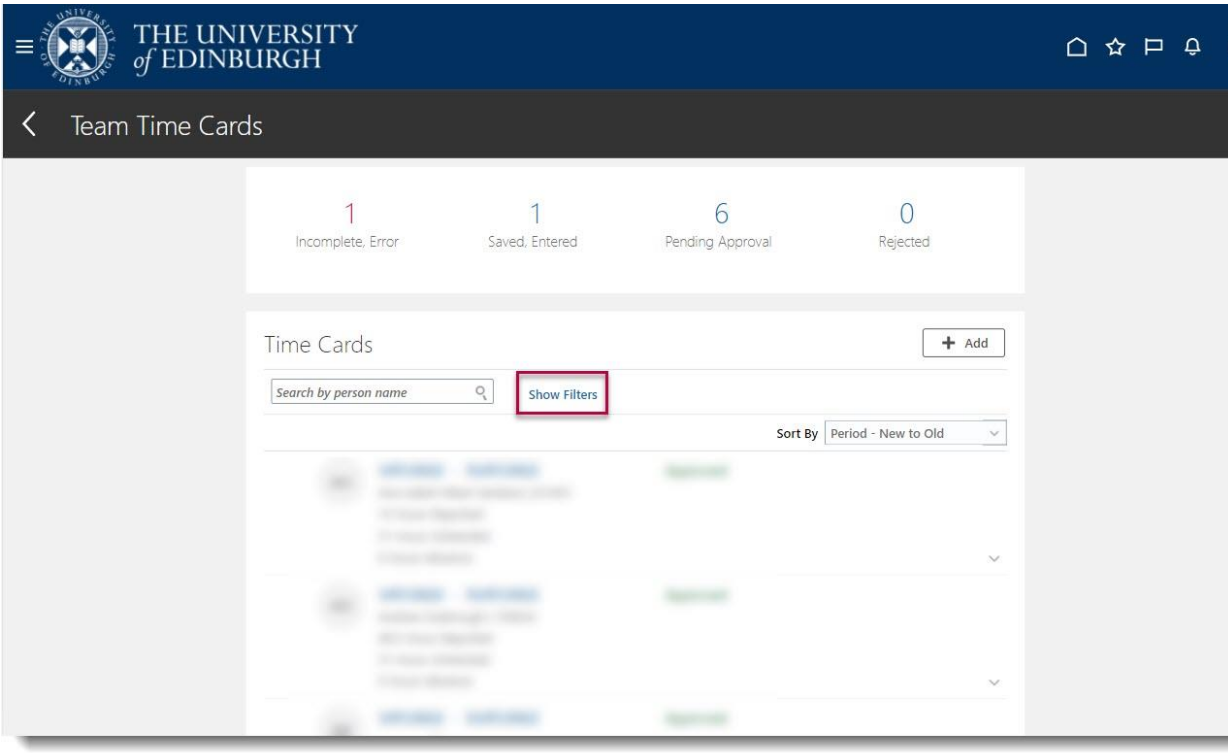
1. From the Homepage, under the **My Client Groups** tab, click **Show More** at the bottom of the Quick Actions



2. Under the **Time** section, click **Team Timecards**.

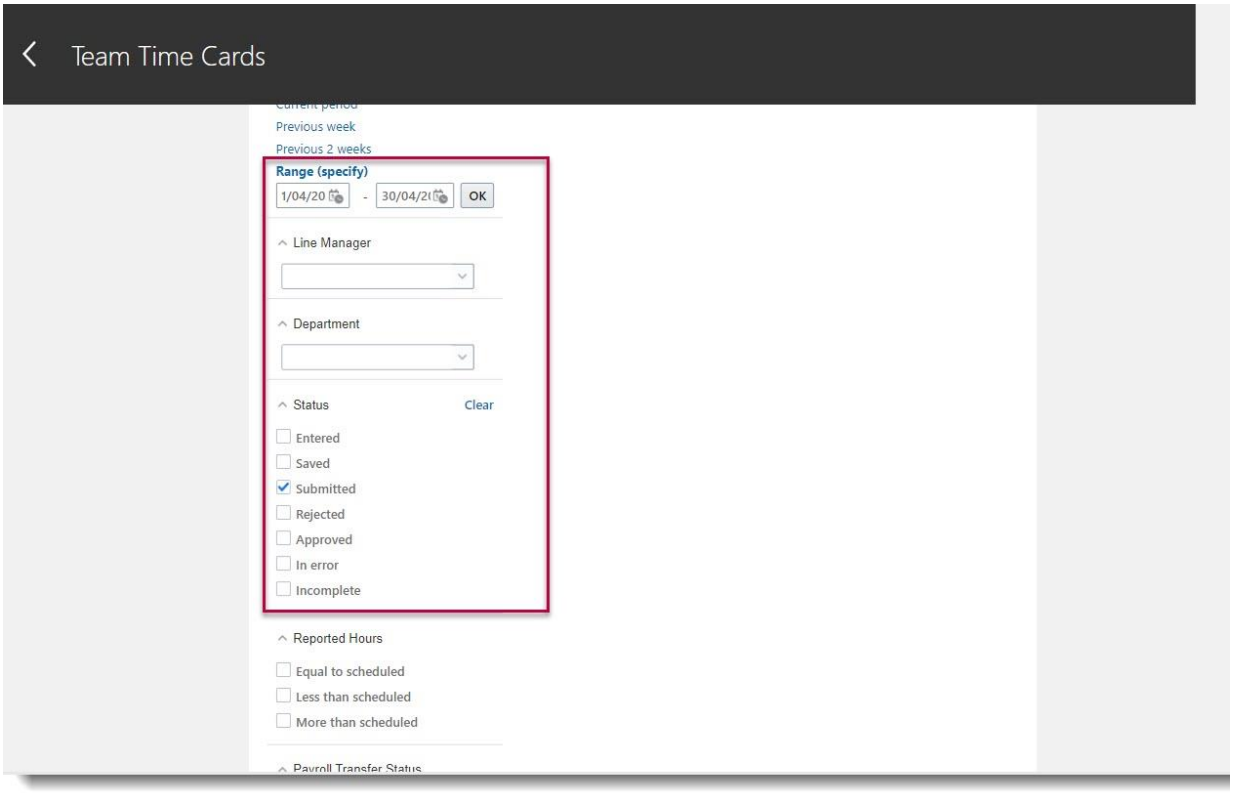


3. Click on **Show Filters**

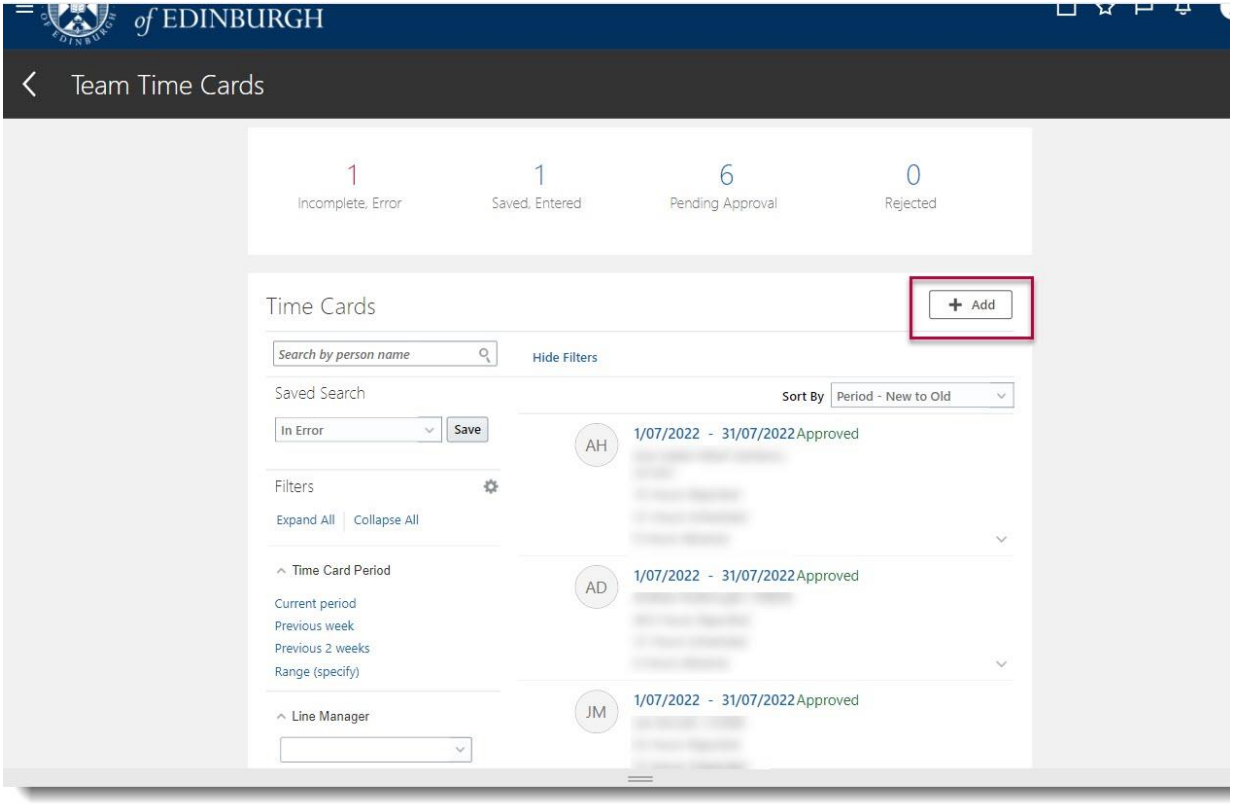


4. Under **Timecard Period**, select **Range**. Use calendar icons to select date range (first and last date of previous month) click on **OK.**

5. Select status of **Submitted**. Can specify a Line Manager or/and Department.

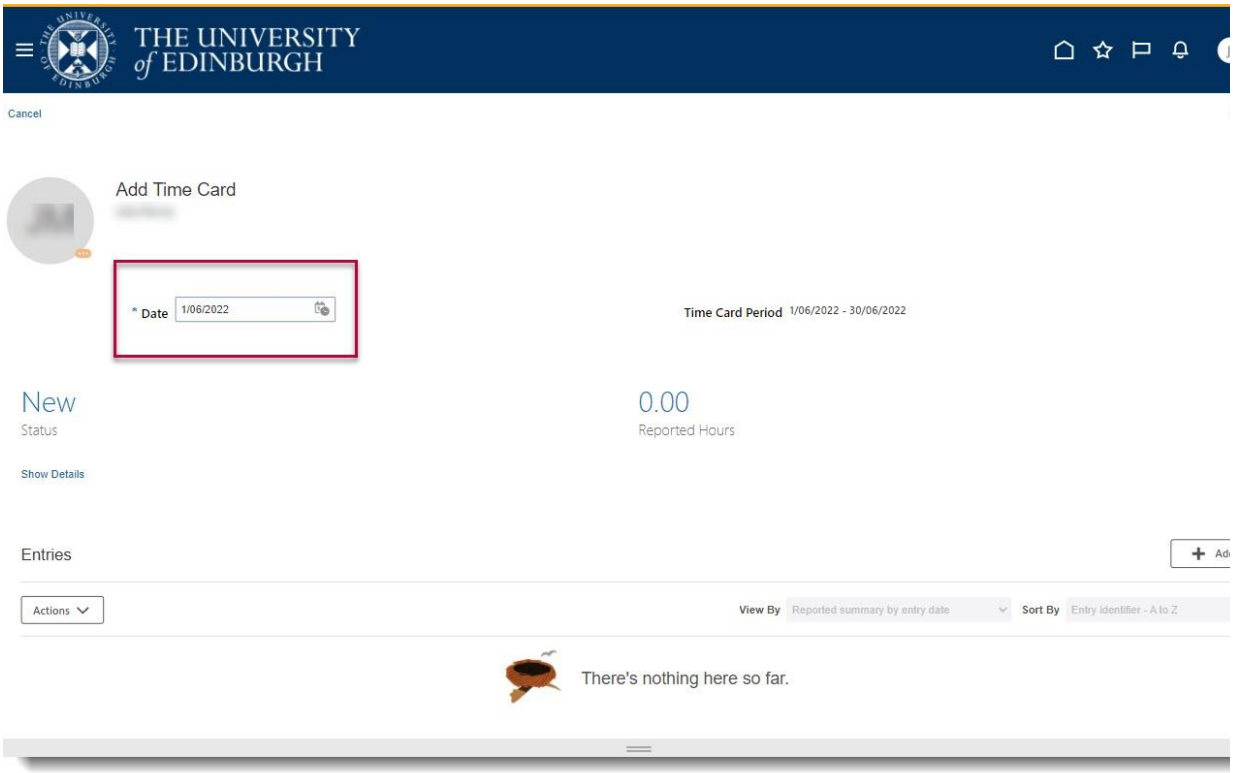


5. Click on the **+Add** button

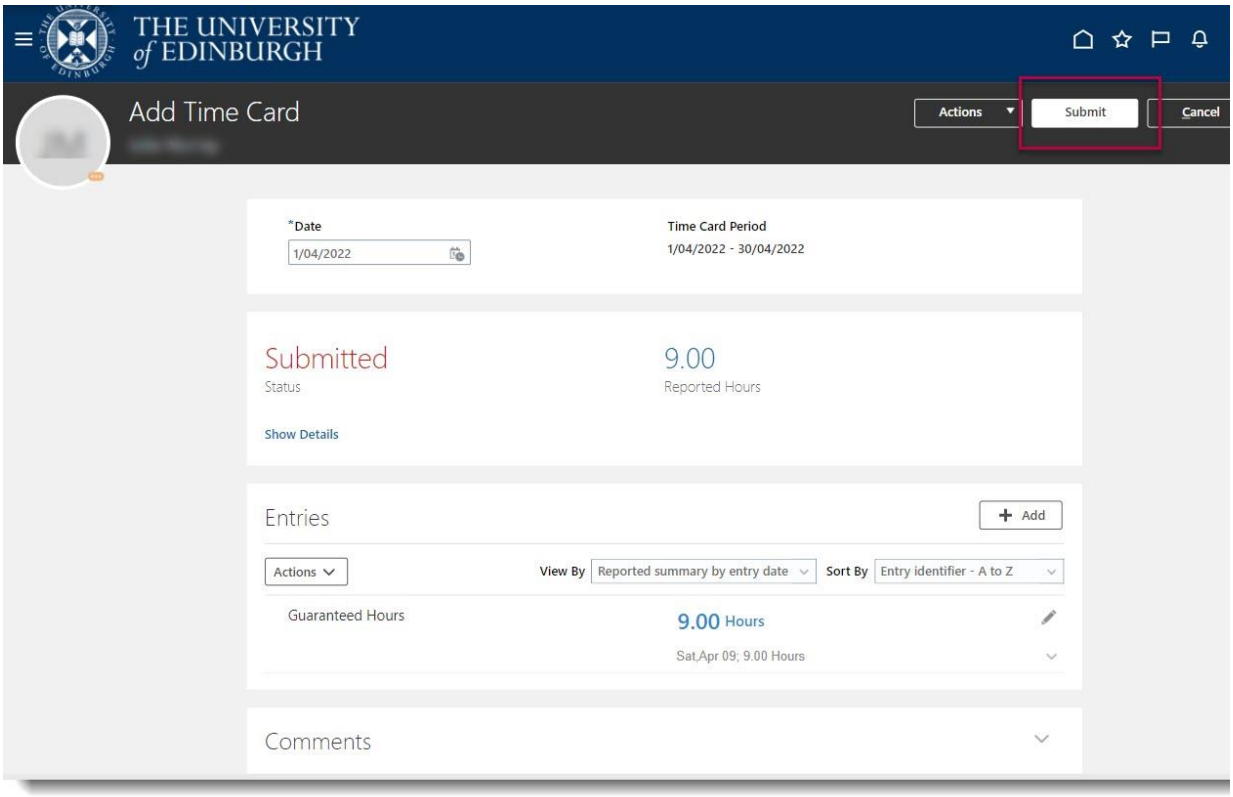


6. Search for the employee

7. Change date for any date of the month the Timecard is for.



8. Click on **Submit**



9. If you want to edit you can click on the **Pencil icon.** If you want to reject it you can click on **Actions** and **Save and Close. If you are rejecting it, make sure**

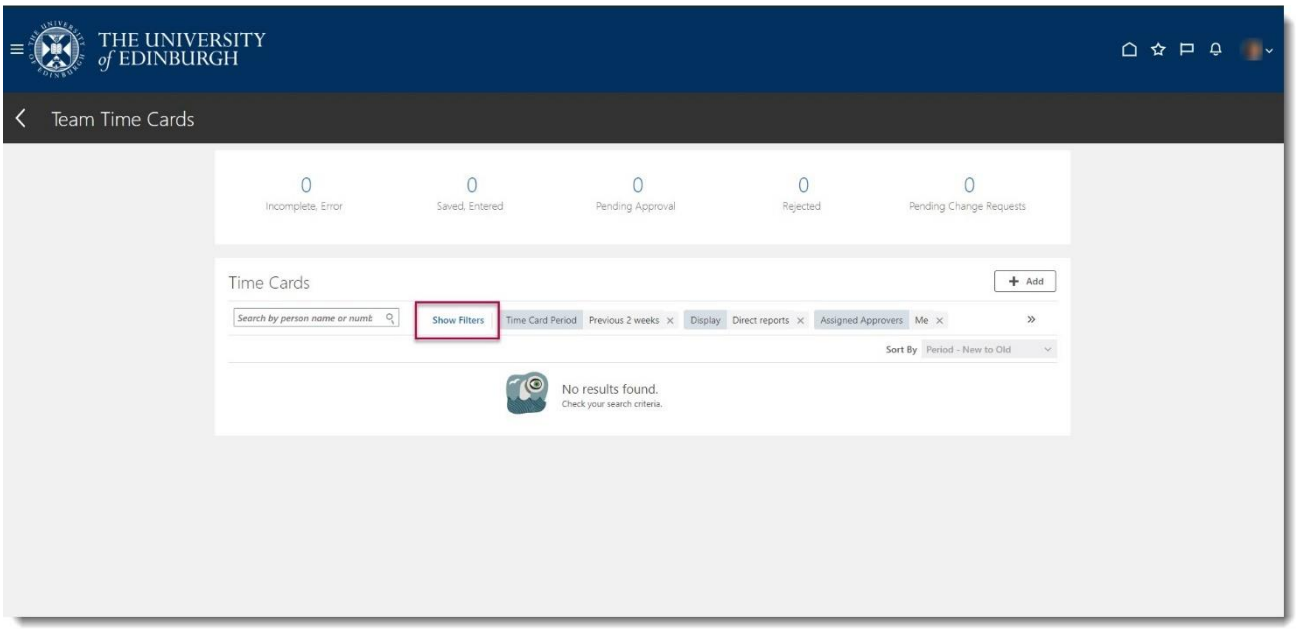
you add a comment as to why, and let the employee know so that they can rectify it.

How to set up a saved search (filters on Team Timecard's page)

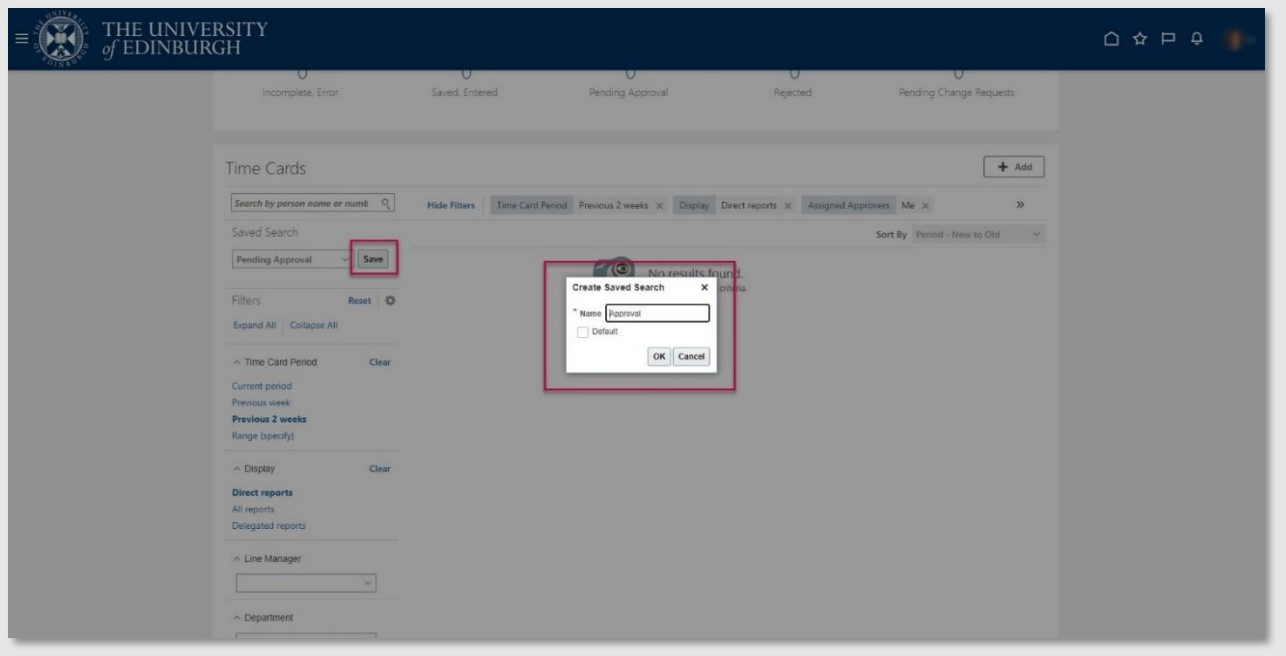
In Detail …

It is possible to set up saved searches on Timecards if you have things to look out for on a monthly basis.

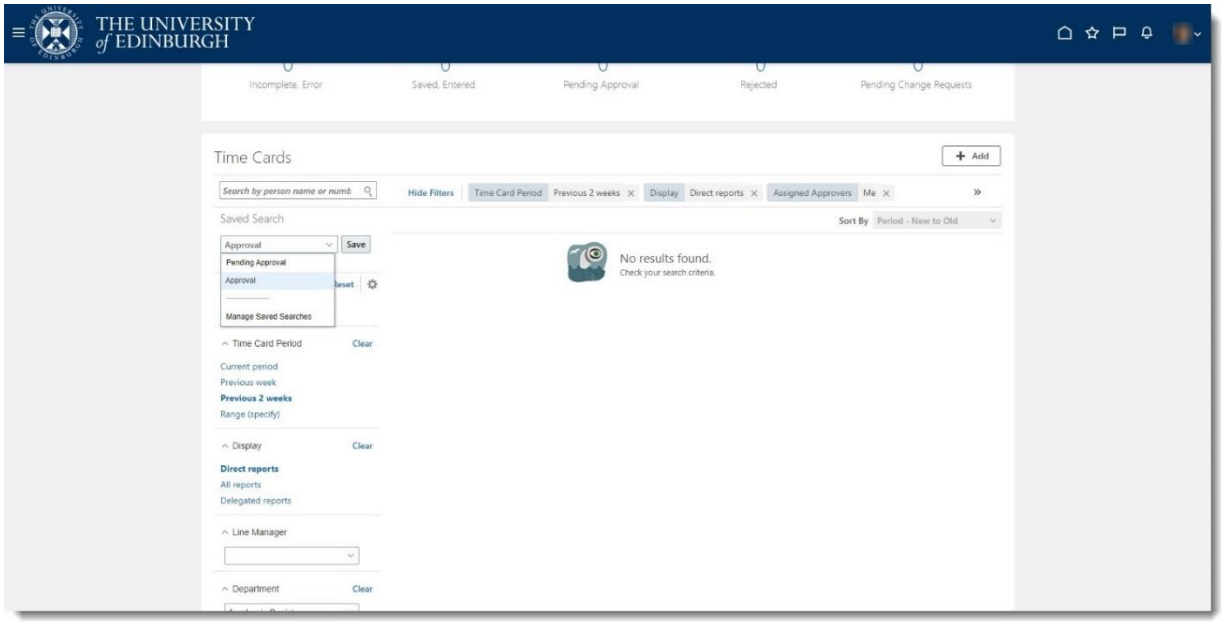
Navigate to Team Timecards: by following steps 1-3 from previous section.



4. Select all of the filters that you would like to have within your search. There are numerous values such as line manager name, department, time period, Timecard status and more.
5. Click on **Save**



6. The Create Saved Search box will appear –give your search a name (it won't appear for anyone else, it's just yours). And click **OK**.
7. The search will then appear on the drop down list under **Saved Search** so you can easily select this each time you visit this page.



Please note that different filter views will appear depending on whether you access them as a manager or as a timekeeper (if you hold both of these roles).