People and Money system

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Line Manager Guide- How to review and approve or reject a Time Card

For more detail on the business process around Time Cards including a glossary of terms, please see the Guide to Time Recording

There are three ways to action a Time Card approval request. You will likely first become aware that a Time Card requires approval by receiving an email. You can either click links within that email to approve or reject. You can navigate to P&M and open notifications to approve via the bell or within Team Time Cards also in P&M.

The following guidance describes how to approve within the system but the information presented in both the email and the system is the same so this guidance will still be useful if you only approve from the email. It is not necessary to do it more than once.

As well as Approving and Rejecting a Time Card you can Edit it but editing can only be done via the Team Time Card app in P&M.

Notes:

There is an expectation of approvers to follow good practice when reviewing and approving Time Cards. All details should be checked, with particular attention to pay impacting fields such as Alternate Rate and Time Type. Costing codes can also be entered by the employee, so this should also be carefully checked.

Employees can only enter time against a specific date. Although the system will not stop users from entering larger number of hours against one day, the Time Card must accurately reflect the hours worked on a particular date. This has an impact on reporting and in some cases payroll deductions. Approvers are expected to check that time submitted is in line with what has actually been worked, wherever possible.

The system will not provide any additional information or alert to an approver when an employee is a Tier 4 or Student Visa holder. These employees have limits on their working hours but it is expected that approvers are aware of this and are not allocating work that sits out with this limit.
If a Time Card is rejected by the approver, the employee or timekeeper will be able to amend this and resubmit, without starting the entire process again. This would then be resubmitted and the approver would receive another approval request.

If an employee has multiple assignments and they have entered time against all of those in the same Time Card, the Manager of each respective assignment will be required to approve the time before the Time Card can then go on to the payroll approval step. This means that if one of those Managers fails to approve the Time Card before the payroll deadline, the employee is unlikely to be paid for that month. Likewise if one Manager rejects the time submitted to them, this will reject the entire Time Card and it will not progress to payroll processing.

If the employee is ending their employment with the University, the Time Card must be submitted and approved before their last day of employment, to make sure that they are paid correctly.

How to Approve or Reject a Time Card Via People & Money

In Brief...

This section is a simple overview and should be used as a reminder.

1. Select and open the approval request in the Bell notification.
2. Review the data entered within the notification.
3. Approve/reject the timesheet.

In Detail...

1. Select and open the approval request (by clicking on the blue title text) in the Bell notification on top of the page.
2. A window showing details of the approval request will open for you to review.

a) Approve and Reject buttons

b) Actions – Gives you more options as follows:

- Request Information: This option will not do anything – there is a known system issue meaning that using this option will not work, so please do not use.
Reassign: allows the line manager to pass the approval request to another user for them to action.

Escalate: passes the request to the Line Manager’s Manager for them to action.

Suspend: Puts the request in a state where it cannot be approved or rejected but can be resumed. There should not normally be any need to use this option as this does not add any value to the process.

Save: If any comments or attachments are added by the manager, but it is not yet ready to be approved or rejected this option could be used to save the information.

c) An overview of the employee’s details.

d) You will need to scroll down to see Submitted hours they are requesting you to authorise.

e) You can see the Time Type selected, check this is correct. Check Alternate Rate as this is the rate the employee will be paid and should only be specified if they are getting paid at a different rate to their normal rate. If this doesn’t apply the field should be left blank.

3. Click on either Approve or Reject depending upon the action to be taken.

- Clicking Approve confirms the Time Card as ready to go to payroll for payment.
- Clicking Reject will send a notification to the employee advising the timesheet has been returned to them and requires further action.

Note: If you wish to reject the Time Card then a comment must be added. It is good practice to explain in the comments field why the sheet has been rejected and specifically mention which entries are an issue.
You will need to do this before clicking on the Reject button. You will do this by clicking on the Actions button and select Add Comments and once completed click Save.

Note: The approval request/open actions also can be accessed from Things to Finish area in the Home page.
How to Approve a Time Card via the Team Time Cards app in People and Money

In Brief

1. From the Homepage, under the My Teams tab, click Show More at the bottom of the Quick Actions
2. Under the Time section, click Team Time Cards
3. Click on Show Filters
4. Select date range (start and end date of previous month) and status of Submitted
5. Click on the blue text
6. Click on Approve

In Detail

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

3. Click on **Show Filters**
4. You can select a date range (start and end date of previous month) and status of Submitted.

5. Click on the blue text
6. Click on **Approve**. If you want to reject it, add a comment to explain why you are rejecting it and then click on the **Actions and Reject**.
How to Edit an employee’s Time Card

In Brief…

1. Follow steps 1-4 from the above section and then follow the below steps.
2. Click on the +Add button
3. Search for the employee
4. Change date to any date within the month the Time Card was for.
5. Click on the Pencil icon.
6. Amend whatever is necessary, click on OK then Submit

In Detail

Follow steps 1-4 from the above section and then follow the below steps:

5. Click on the +Add button

6. Search for the employee

7. Change date to any date within the month the Time Card was for.
8. If you want to edit, you can click on the **Pencil icon**.

9. Amend whatever is necessary, click on **OK** then **Submit**