THE UNIVERSITY of EDINBURGH

People and Money system

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Contents

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

Before you start

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

New line managers should familiarise themselves with the timecard entry process for their area as this differs across the University. Speak to your line manager, timekeeper for your area or school/department administrator for guidance.

There are three ways to action a Timecard approval request. You will likely first become aware that a Timecard requires approval by receiving an email. You can either click links within that email to approve or reject. Alternatively you can navigate to People and Money and open your notifications to approve via the bell icon or within Team Timecards also in People and Money.

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 Timecard you can Edit it but editing can only be done via the Team Timecard app in People and Money. Please note the section on editing timecards.

Notes

There is an expectation of approvers to follow good practice when reviewing and approving Timecards. 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 Timecard 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 Timecard is rejected by the approver, the employee or timekeeper will be able to amend this and resubmit before the 10th of the month, 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 Timecard, the Manager of each respective assignment will be required to approve the time before the Timecard can then go on to the payroll approval step. This means that if one of those Managers fails to approve the Timecard 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 Timecard and it will not progress to payroll processing.

Timecards, including those that have been rejected and resubmitted, 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.

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). **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.

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

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

How to Approve or Reject a Timecard via People and Money

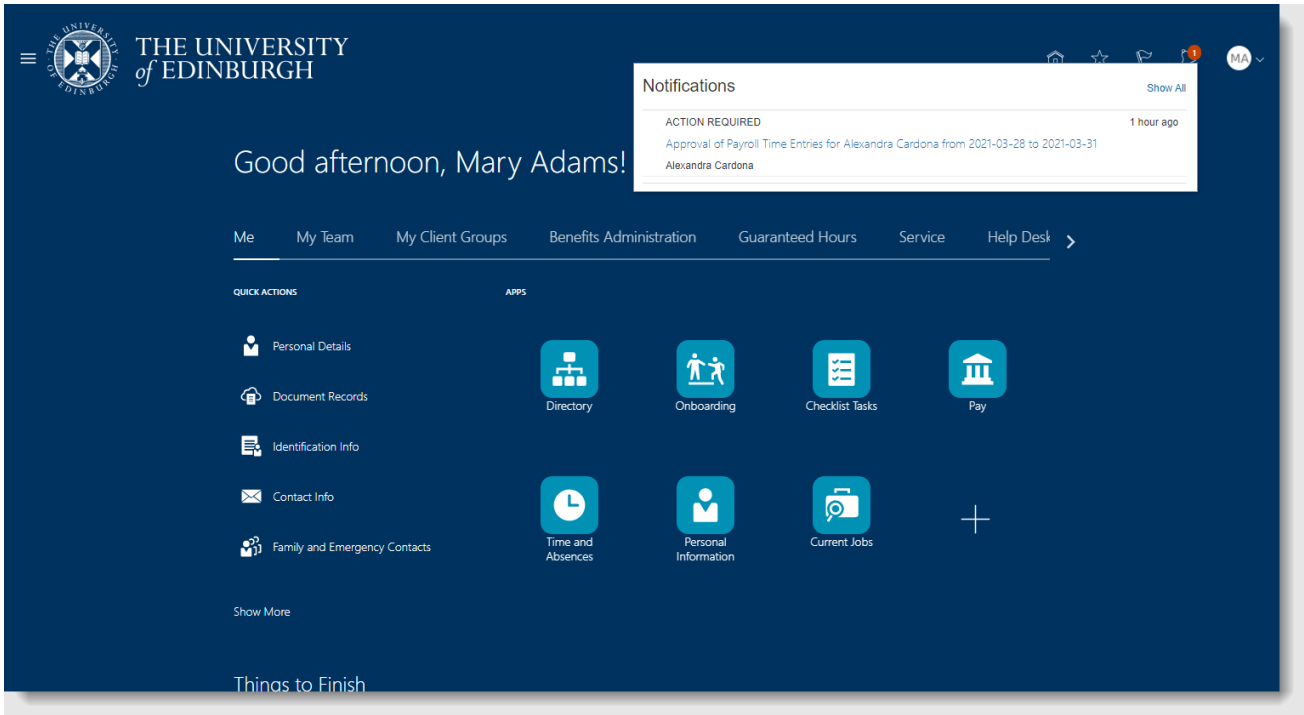
In Brief...

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

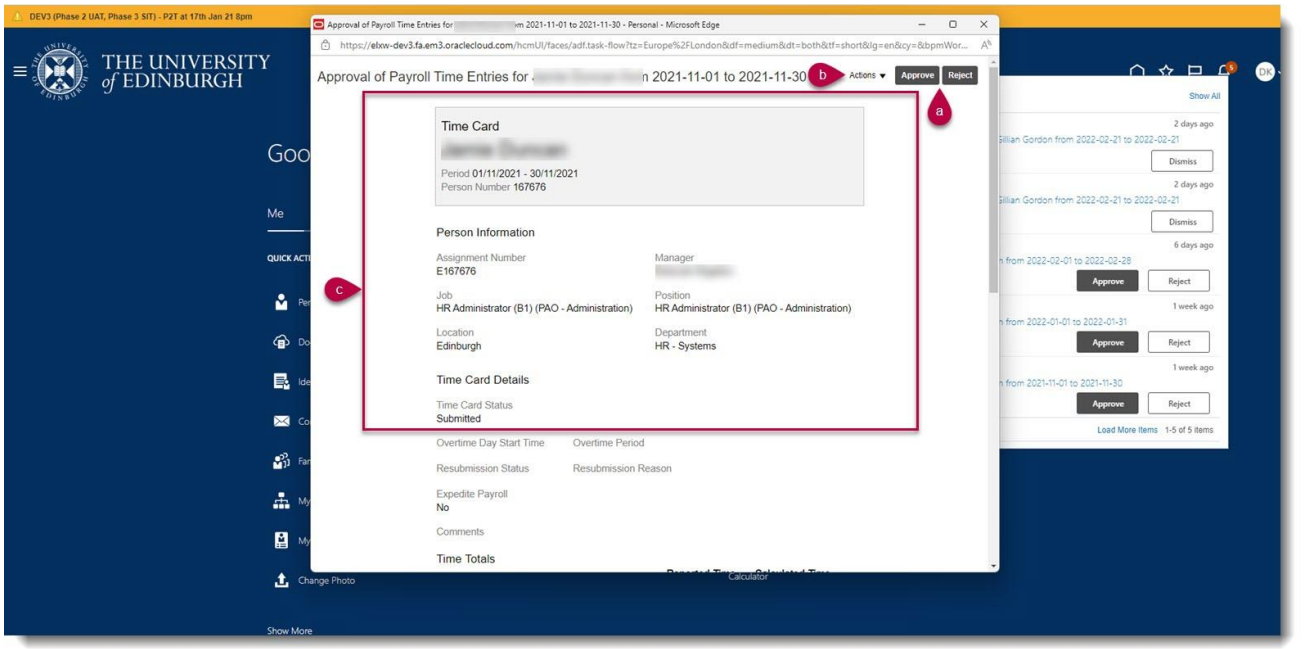
1. Select and open the approval request in the **Bell** notification.
2. Review the data entered within the notification.
3. Approve/reject the timesheet.

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

- Clicking **Approve** confirms the Timecard 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.

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.

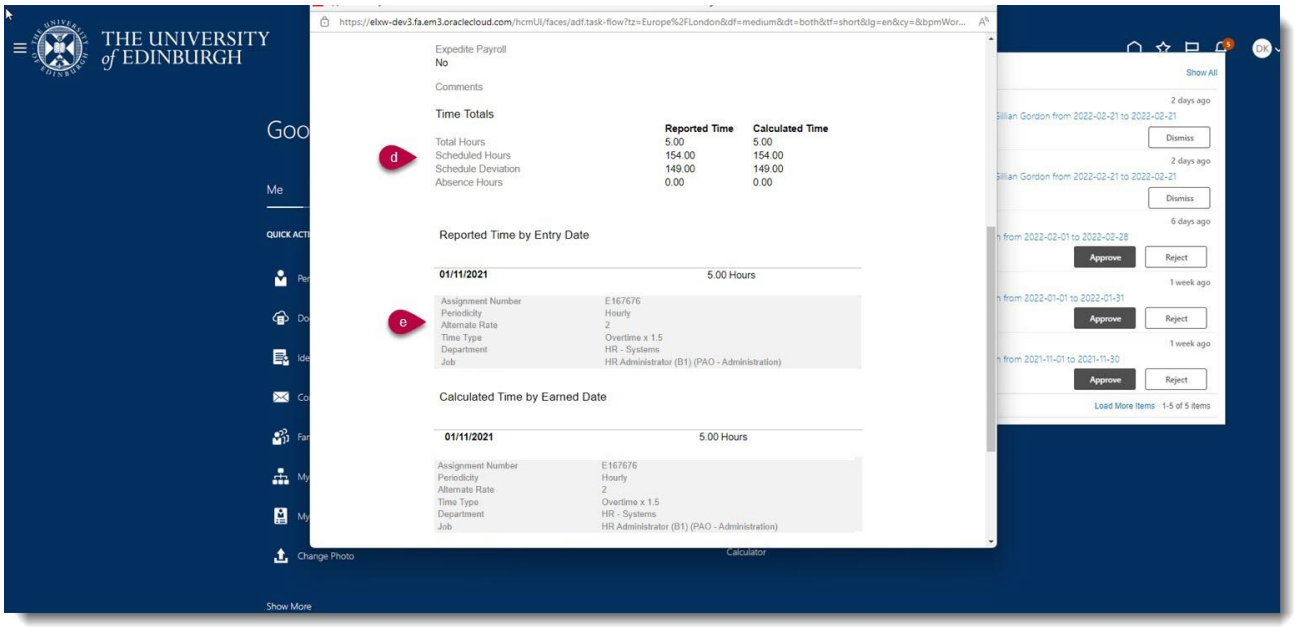
Escalate: passes the request to the Line Manager's Manager for them to action.

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, **so please do not use**..
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.

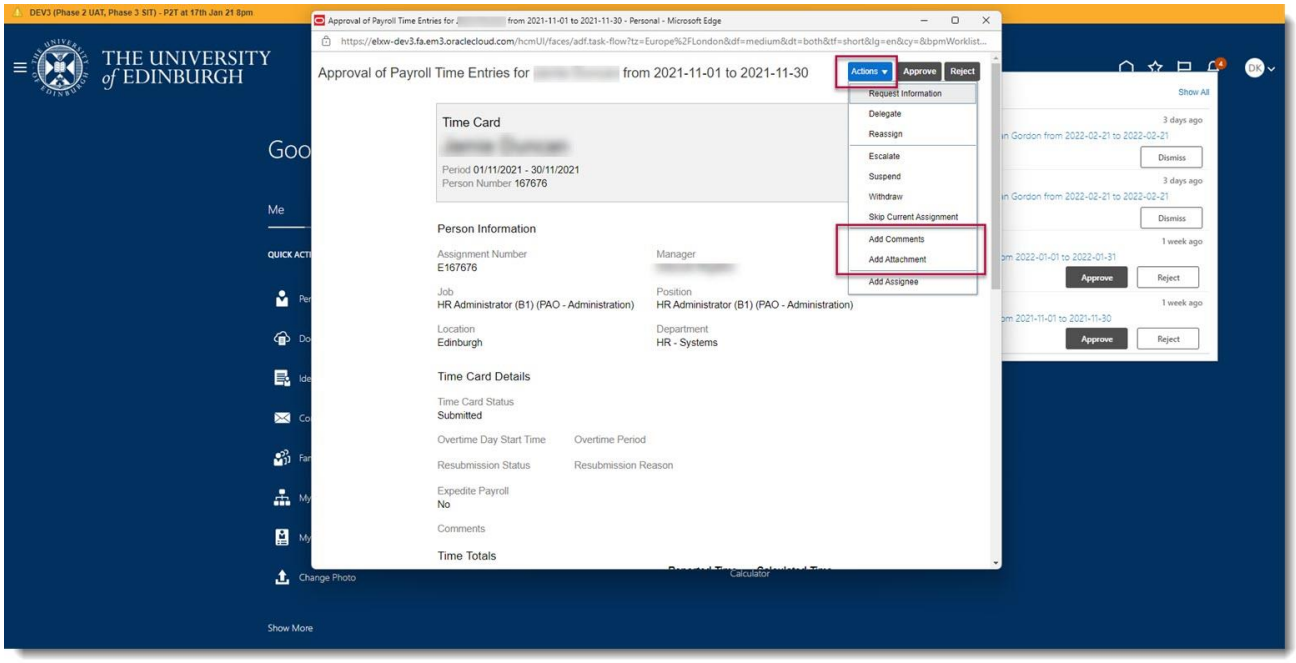
e) You can see the Time Type selected, check this is correct. Check Alternate Rate as this is the rate the employee will be paid and should only be specified if they are getting paid at a different rate to their normal rate. If this doesn't apply the field should be left blank.



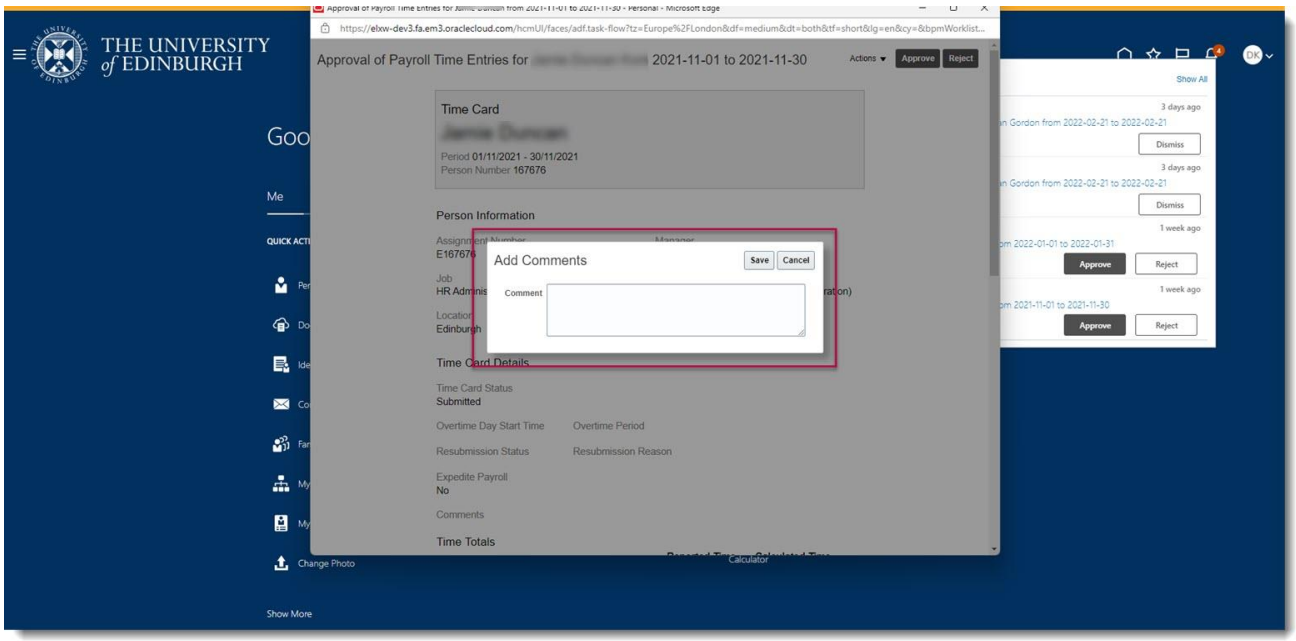
3. Click on either **Approve** or **Reject** depending upon the action to be taken.

- Clicking **Approve** confirms the Timecard 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.

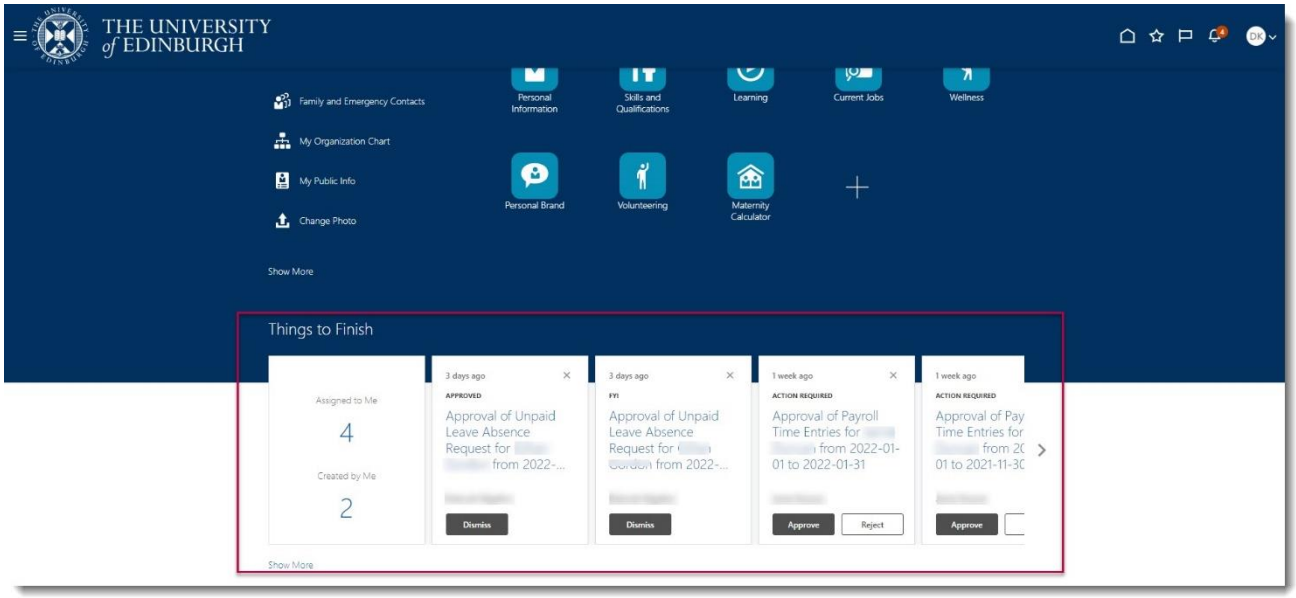
Note: If you wish to reject the Timecard then a comment must be added. It is good practice to explain in the comments field why the sheet has been rejected and specifically mention which entries are an issue.



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.



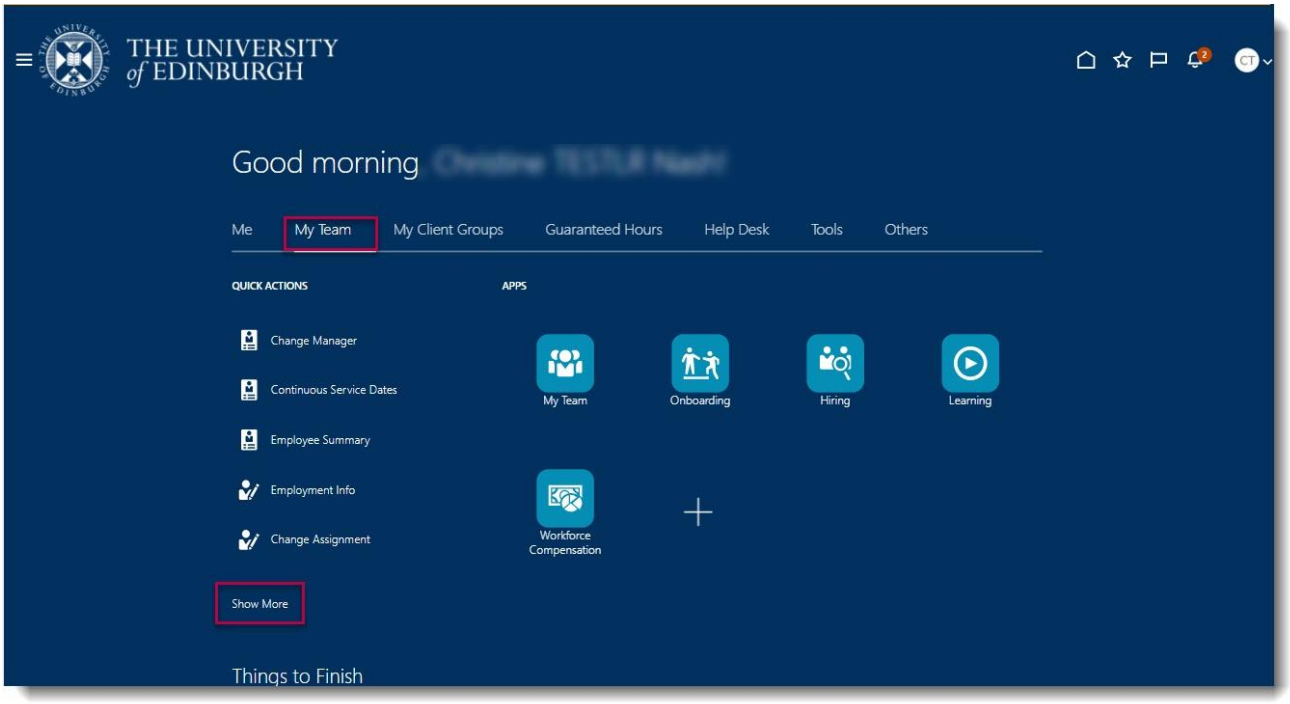
How to Approve a Timecard via the Team Timecards app in People and Money

In Brief

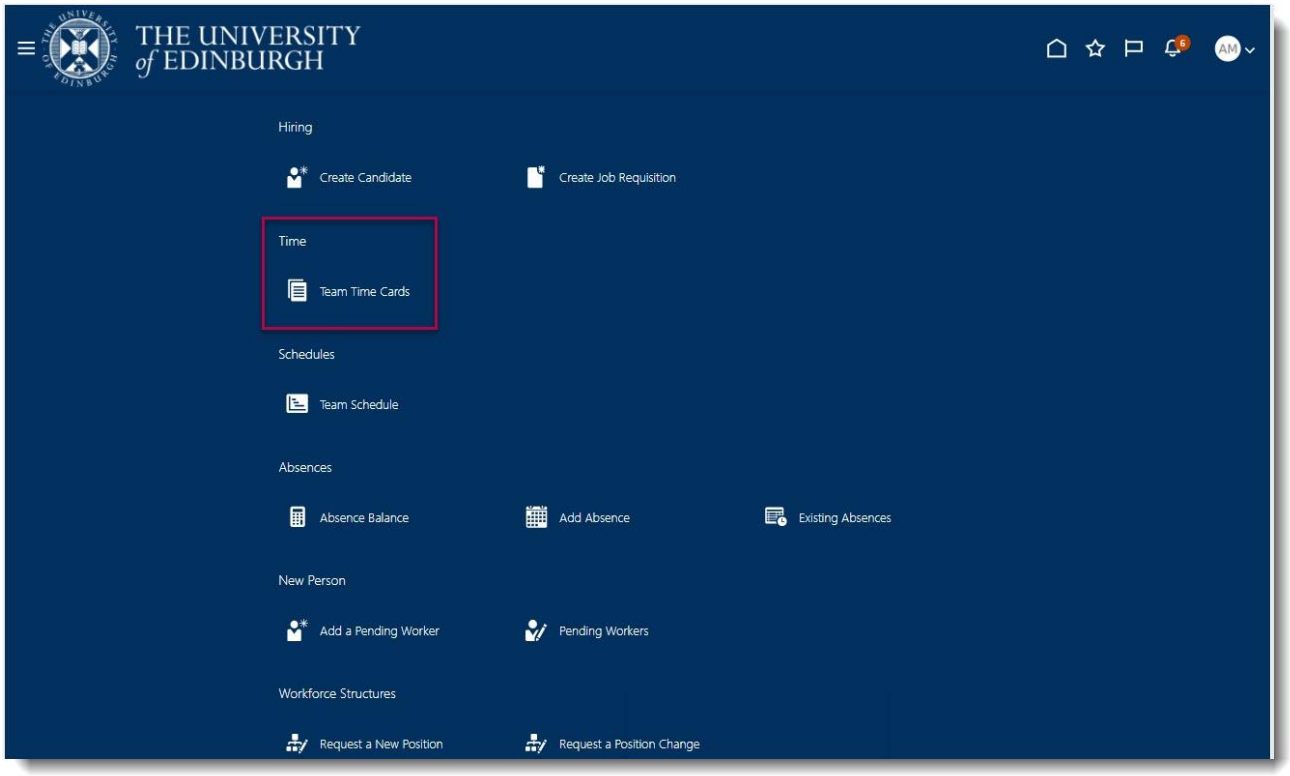
1. From the Homepage, under the **My Teams** tab, click **Show More** at the bottom of the Quick Actions
2. Under the **Time** section, click **Team Timecards** .
3. Click on **Show Filters**
4. Select date range (start and end date of previous month) and status of **Submitted**.
5. Click on the **blue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

In Detail

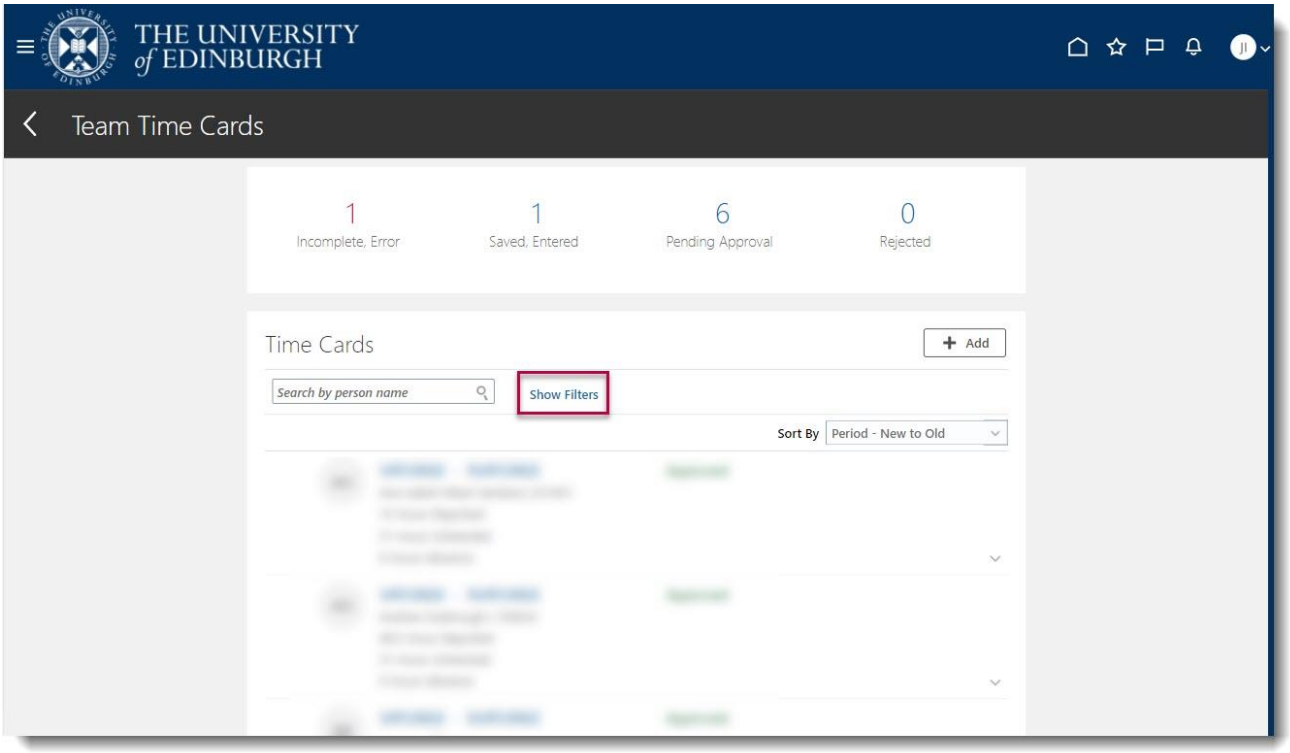
1. From the Homepage, under the **My Teams** tab, click **Show More** at the bottom of the Quick Actions



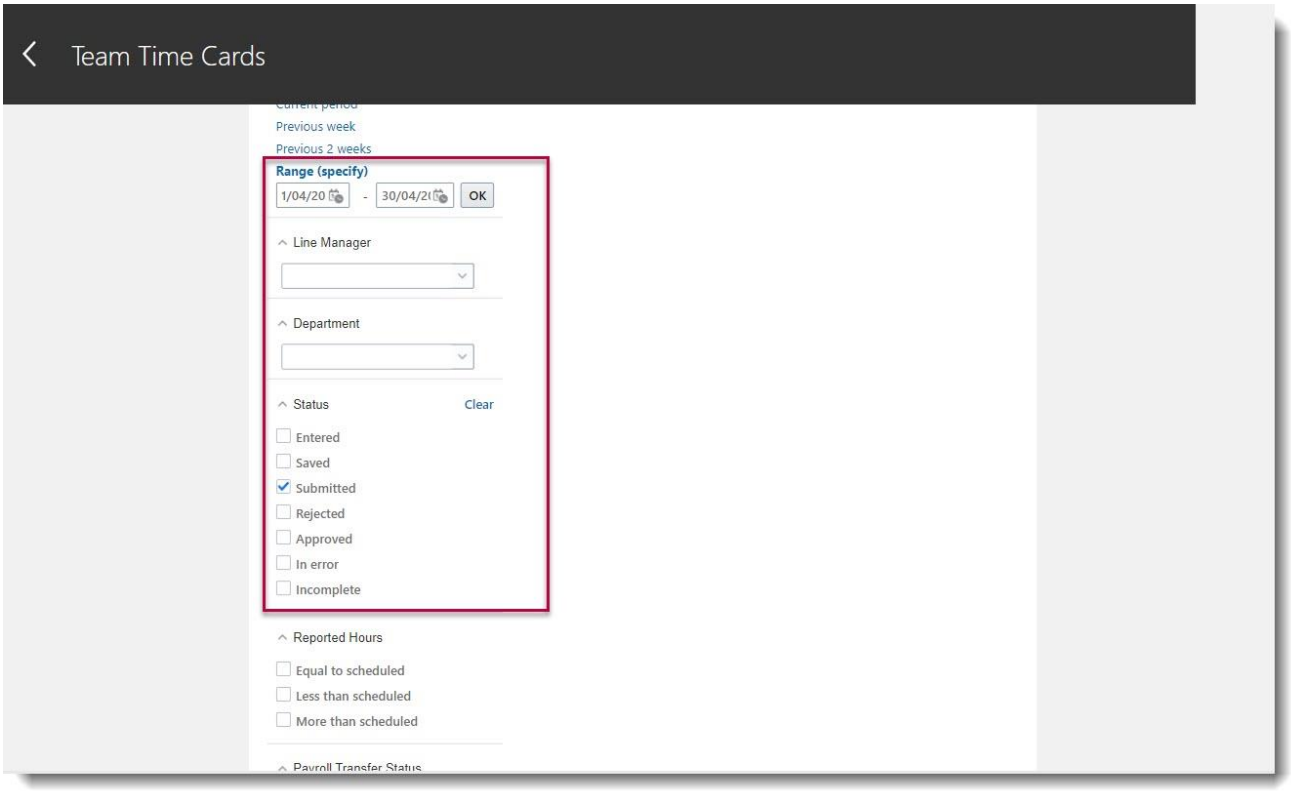
2. Under the **Time** section, click **Team Timecards**.



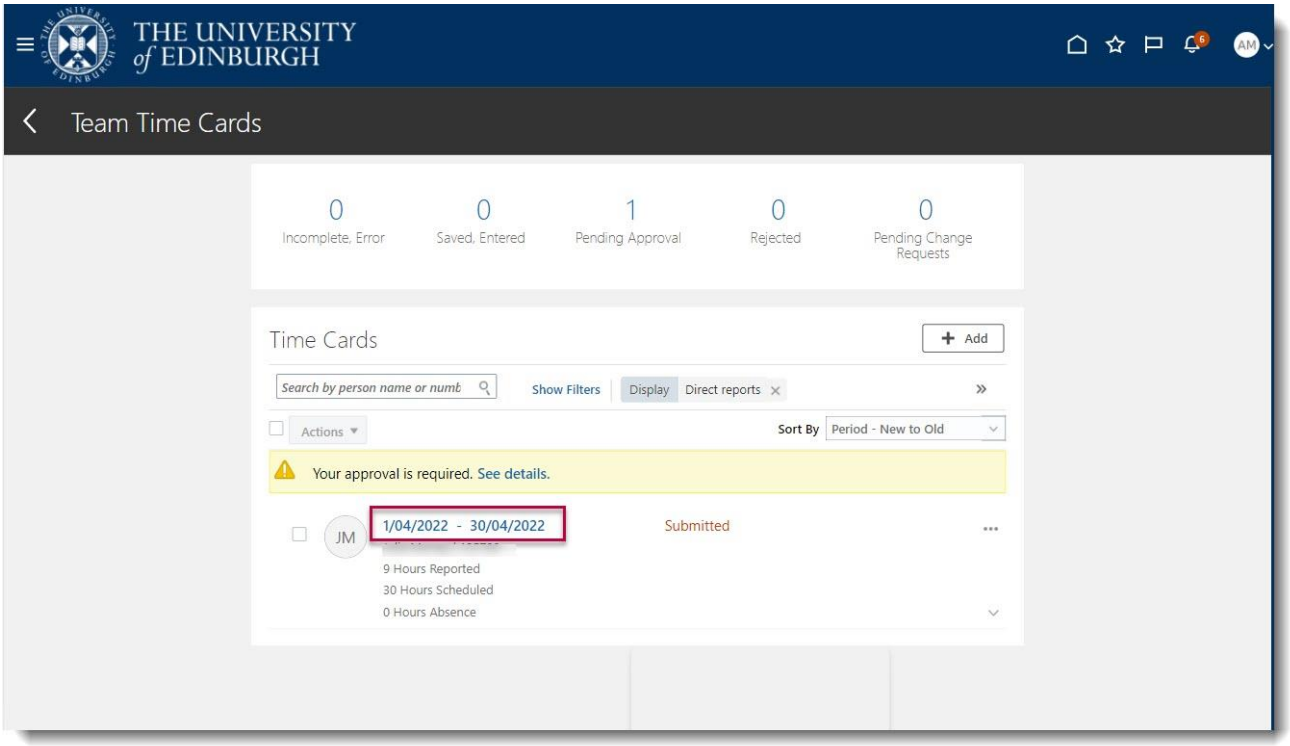
3. Click on **Show Filters**



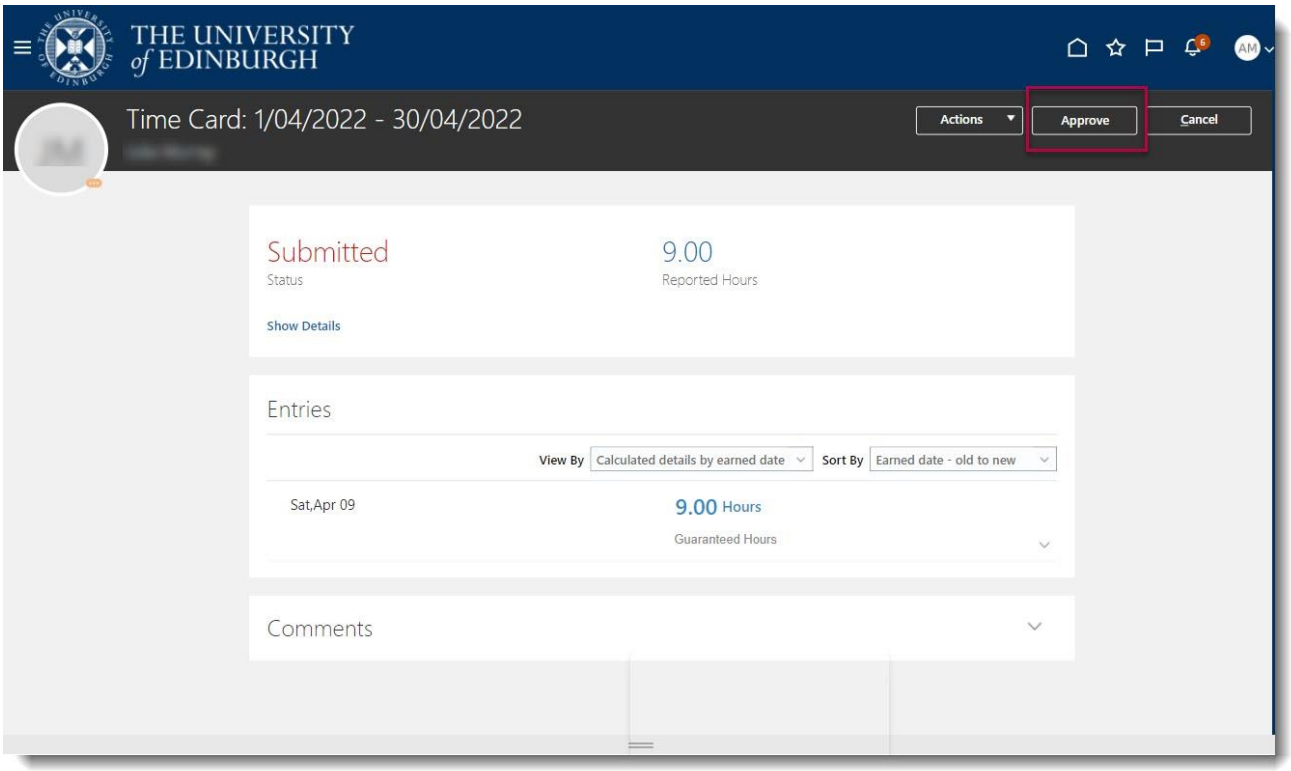
4. You can select a date range (start and end date of previous month) and status of **Submitted**. You should also review timecards with a 'saved' status and remind the employee to submit for approval. Any hours sitting at the saved status wont be processed by payroll



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 Timecard

In Brief...

1. 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 Timecard was for.
8. Click on the **Pencil icon.**
9. 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

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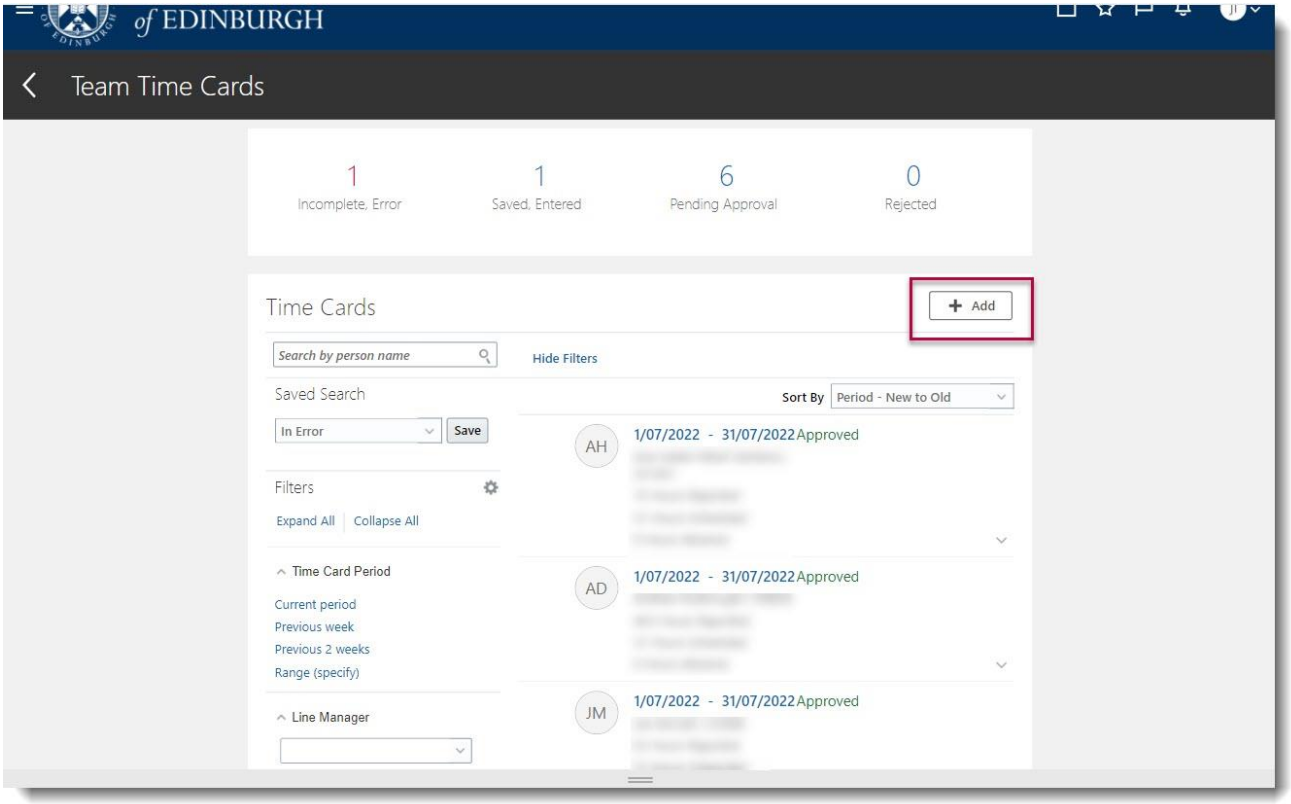
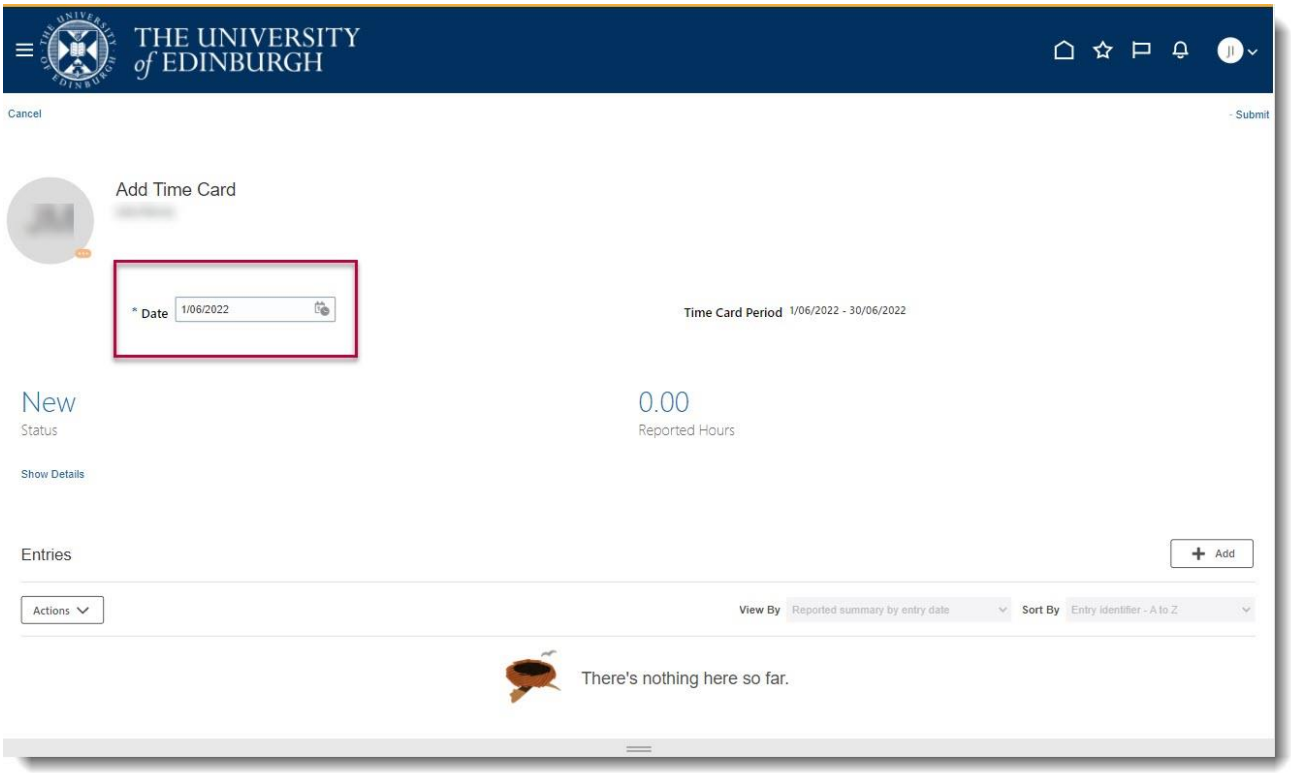
5. Click on the **+Add** button



6. Search for the employee

7. Change date to any date within the month the Timecard 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**

Editing Approved Timecards

If the employee, line manager or timekeeper edits a timecard for that month's payment, 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 by the payroll cutoff, this will prevent the original hours on the timecard, which had previously been 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.

Viewing Approved 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 in time for one month’s payroll date can miss that payroll date, without it being apparent that they have been effectively deferred to the next payroll date.