INCLUSION SCHEDULING AND TIME VERIFICATION
Quick Start Guide
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INTRODUCTION

The Scheduling and Time Verification components allow employees to be scheduled, determine how they are to be paid, and verify that the shifts were worked as originally scheduled or make adjustments to reflect the actual time worked.

The information flows through the modules in the following order:

Scheduling
The Scheduling module provides a visual tool to build schedules on a departmental basis and easily assign staffing resources. It includes reporting on the total number of hours scheduled by individual and department and whether an individual will be approaching an overtime status, considering both actual worked shifts and future shifts. You can also pre-assign the type of hours to be allocated to an employee for example vacation, bank time, or overtime.

Time Verification - Time and Attendance
The Time Verification module allows changes to be recorded between what was scheduled versus what was actually worked. It provides a means to record sick time or other schedule changes that may have occurred, and allocate the hours to the appropriate payroll code. The time verification module can also be connected to physical time clocks or a web-based time clock (Web-Punch) to allow employees to physically record when they arrive and leave a location.

Daily Pay
Daily Pay is a calculator module that reviews all of the hours recorded in Scheduling and Time Verification and applies rules for your organization to allocate them to the appropriate pay code, if they have not already been pre-assigned. It is also a secondary verification tool, where changes can be made if required prior to submitting for payroll. Once all of the days are marked as Complete the hours are ready to be loaded onto the payroll input sheet for processing.

Payroll
The payroll module interface is in an easy to use spreadsheet format which will pre-populate with the hours and pay-code information from Daily Pay. Payroll instructions that are periodic, for example expense reimbursements, may be added on an as needed basis. The entire payroll or the results for one individual employee can be processed and reviewed prior to any financial posting.
Inclusion Scheduling and Time Verification

**Scheduling Module**
- Schedule Created for Each Department
- Hours Assigned to a Pay Code if Required
- Schedule Submitted for Approval
- Schedule Approved
- Schedule Posted
- Employees Notified via Email (Optional)
- Employees Access Schedule via My Schedule menu

**Daily Pay Module**
- Scheduled Time for Current Pay Period Loaded Into Daily Pay
- Actual Hours Updated and Assigned Appropriate Pay Code if Required
- Verified Hours set to Approved
- Verified Hours set to Completed

**Payroll Module**
- Input Sheet Created for Regular Payroll Run
- Completed Hours are Loaded From Daily Pay
- Additional Hours or Payroll Instruction are Added to Input Sheet
- Completed Input Sheet is Submitted for Calculation
- Payroll is Approved for Processing
- Funds Transferred / Statements Delivered Electronically (Optional)

**Time and Attendance Module**
- Employees Clock In/Out via Biometric Finger Reader or Web-Punch (Optional)
- Schedule is Loaded and Compared to Clock Time Records
- Exceptions Handled by Reviewers
- Verified Hours set to Approved
SCHEDULING AND TIME APPROVAL

Creating Schedules

Schedules are broken down by department, and while there is no restriction on the period chosen, it is recommended that the scheduling periods be in-line with the pay periods of the organization to simplify the verification and approval process.

Steps for adding a schedule

1. Select the Schedules item on the top menu.

2. Choose Add Schedule.

3. Select the department and period if required. Note that the period will be set by default, and users will only have the ability to create schedules for departments for which they have been granted permission.

4. Click Create to start using the new schedule.

To view the period details of the schedule, click the Show Schedule Details link, select it again to hide.
Schedule View Options

By Time
By default the calendar will be displayed by week, to adjust select one of the options in the view menu. Timeline will display employees on the left side with a bar graph indicating their shifts.

By Group
Shifts can be grouped by either Employee or by Position. Right click on the schedule, hover over Group By and select Employee or Position.

Steps for creating or modifying shifts

1. Double click on the calendar day and start time, or right click and choose New Shift, the shift editor will then open.

2. Choose the employee, set the desired start and end time.
3. Choose a position if required. If the employee has a default position setup in their profile, that position will be chosen automatically. If the employee is eligible to work in more than one position it may be changed.
4. Add payroll notes if desired. This information will flow through to Time Verification and Daily Pay.
5. To allocate hours to a specific pay code, select, and enter the desired number hours. The system will only allow you to enter hours up to the length of the shift.

6. If the hours are for time off such as sick or vacation, choose the Time Off check box and then the desired type. The current available balance for the employee will be displayed so they can be scheduled appropriately and will update once the shift is saved.

For shifts such as sick an icon is displayed on the schedule for reference.
Type and number of hours to be allocated to this shift. The remaining hours, in this case 7, will be treated as Regular for payroll purposes.

Payroll notes will flow through to Time Verification and Daily Pay, to inform others of details about the shift. (Ex. A reason for overtime)

Information about this employee’s hours

Figure 1: Shift Editor
Copying shifts

Shifts can be copied individually using copy and paste or for entire period using the Copy Shifts tool.

To copy an individual shift:
1. Right click on the shift and choose Copy.
2. Right click on the day to copy it to and choose Paste.

To copy an entire period:
1. Select Copy.
2. Make adjustments as needed using the Copy Shifts tool shown in Figure 2.
Inclusion Scheduling and Time Verification

Copy period is the range of dates to copy. Note the target end date will adjust automatically so the number of days in both periods are equal. By default the copied schedule will be within the same department. Note if another department is chosen the shifts will be copied as vacant.

The employees in the copy period will also be copied forward – if unselected the copied shifts will be vacant for assignment at a later date. Note - if a shift already exists for the employee in the future time period that the existing schedule is being copied to, that shift will be created as a vacant shift.

The pay allocations from the existing shift can be copied for standard types such as overtime or time off types such as vacation.

If shifts already exist in the target period and there is a conflict, the copy can still be forced with the employee assignment or changed to vacant. Use merge to keep shifts already in the target period - replace to delete existing and add the copied shifts.

Figure 2 - Copy Shifts Tool
Making Adjustments

After a schedule has been created, changes may need to be made. Any additions or deletions of shifts that relate to the hire or termination of employees will occur in the created schedule so that they will be reflected in future scheduled copied from a previous schedule. Any planned time allocations (vacation, sick time, etc.) should also be set in the schedule before posting.

Final Steps

To complete the schedule so that employees may see it on their My Schedule page and to send notifications:

1. Select Approve.
2. Select Post, this will make schedules visible to employees as well as notify all employees on the schedule with a copy of their shift times by email (if an email address has been added).
3. If after making changes, click this will send a notification email to all those who are affected by changes made.

Note that you can have different people in your organization assume responsibility for approving and posting schedules if desired.

Effects of Time Verification on Schedules

There are two effects the use of Time Verification will have upon schedules created.

1. After loading a schedule into Time Approval, a small black arrow will appear on the top left corner of any shift that has been loaded into Time Approval.

2. After a shift has been approved in Time Approval, in schedules that shift’s fill colour will become grey. This is to indicate that this shift is approved and can no longer be edited.
TIME APPROVAL

The Time Approval process is started by selecting the approve time link on the main schedule page for a department. All records approved here will automatically be marked as approved in Daily Pay.

1. Click the *Load* button. By default the dates from which to load data from will be set to the beginning date of the pay period to yesterday (real time).
2. To approve a single row select the checkbox on the left beside the employee’s name and hit the *Approve* button. The checkbox at the top of the table, underneath the *Approve* button and beside the world *Employee* can be used to select all shifts currently displayed.

Note that as you approve time records and then choose *Save*, the records will be removed from view so that you can focus on the remaining records requiring approval. To have them return to the page simply choose the *Clear* option next to the status filter.
The Paid Start and End time is used in the final payroll calculation and can be edited if required.

Filters can be applied to limit the number of records by employee, date, approved status, and if using time and attendance match status.

Load brings in records from the schedule. Use Save to keep any changes made. If a mistake is made simply leave the screen and do not save.

Click hours on the report and the same shifts will appear on the left side of the screen.

The check box allows selection of records to approve, unapprove, or delete.

The Paid Start and End time is used in the final payroll calculation and can be edited if required.

Standard attendance reasons such as Sick and be selected and payroll notes can be added to flow through to Daily Pay.

The number of hours that have been pre-allocated and icons if applicable from the schedule are shown here. Changes can be made by clicking on the time.

This report shows a summary of approved, unapproved and total hours by employee and date.

Figure 3– Time Approval
**Summary of Approved Hours Report**

Open the *Summary of Approved Hours* by clicking the slider button on the upper right hand side of the screen. It displays a summary of Unapproved, Approved, and Total hours in Time Approval. This lets you review your work for errors easily.

It doubles as a quick way to find shifts. To filter shifts, hover over any number in the *Summary* report. They should turn blue. If the number is blue, that means you can click on it. Clicking on a number will display the shifts on the left hand side of the screen for quick approval. See Figure 3 above for an example of this behaviour.

**Adjusting Filters**

By changing the filters in Time Approval, you’ll be able to focus what shifts that displayed, making finding and editing shifts quicker and easier.

- **Employee Filter**: All Employees  
  
- **Date Range Filter**: From: 01/07/2013 To: 01/07/2013  
  - Change  
  - Clear  
  - Today  
  - Previous Day  
  - Next Day  
  - Two Days  

- **Match Status Filter**: All Match Statuses  
  - Change  

- **Status Filter**: None  
  - Change  
  - Clear

**Steps to Filter**

1. Click *Change* beside the filter you want to set. A pop-up window will appear.
2. Select the items/dates to display on the left. Hold *CTRL* and click to select multiple items.
3. Click *to set selection to be Applied Filters* and then *Save* to apply filters.

Note: Clicking *Clear* beside any filter will completely remove any filters associated with that filter. For example clearing the date filter will show days for that pay period.

**Types of Filters**

- **Employee** - Use to show only selected employees. Employees available to filter are all available to that department. The Employee filter is by default set to display all employees.
- **Date Range** - Use to show only selected days. Days available to filter are only those in the scheduled pay period. The Date Range filter is by default set to the first day of the pay period.
- **Match Status** - Use to show only shifts with selected punch in / punch out match statuses. The Match Status filter will by default be set to show all statuses.
- **Status** - Use to show only shifts with selected approval status. Statuses unapproved are classified under *None*. The Status filter will by default be set to *None*. 


**Making Adjustments**

The Adjustments to be made here will be events that have already occurred and are now required to be input. These include: actual time of an employee’s start/end, missed shifts, one time additions or deletions of shifts, unscheduled absences, and unplanned pay code allocations.

1. To change the number of hours an employee will be paid, edit the *Paid Start* and *Paid End* time. You do not need to adjust the schedule hours.
2. To pay an employee that was not on the schedule, choose *Add*, select the employee and set the *Paid Start* and *Paid End* time.
3. When necessary, select an attendance reason from the drop down box to allocate an entire shift to a specific pay code (sick paid/unpaid, paid/unpaid absence, etc.). The chosen attendance reason will be combined with any text in the Daily Pay Notes box in Daily Pay.
4. To remove a record so that it does not flow through to Daily Pay, click the box beside the employee’s name and then select *Delete*.
5. To change the pay code allocation, for example if someone was scheduled but left sick, click on the blue time link in the Pay Code Allocation column. This will bring up a shift hours allocation box. If you wish to allocate hours to a particular pay code, click on the small *Add* button. This will reveal an area that will allow you to assign pay codes to hours related to time off or otherwise. To selected time off pay codes, click the box underneath the time off heading. The drop-down box will then include the time off pay codes chosen by your organization. If the hours you are verifying was not item off, simply select a pay code from the drop-down box and indicate the number of hours you would like to assign. Click *Ok* and you are done.
Enter in the number of hours to be allocated. This number must be less than the shift duration.

The shift hours allocation box will not appear until Add is clicked. If Add is clicked again, additional rows will appear below the one displayed.

Selecting this box will set the Pay Code drop-down box to show only pay codes with regards to paid (?) time off. Unselected will show all remaining pay codes.

A drop-down box that displays which pay codes can be allocated. These change depending on whether or not the Time Off box is checked.

Click to display the shift hours allocation box. Click again to add additional rows.

Click to delete the pay code allocation.

Displays the balance of the currently selected pay code. The balance will update after a number has been entered in the allocation box.

Figure 4 – Pay Code Allocation Window – Time Approval
**Tips for Making Adjustments**

To make changes efficiently, decide when you’ll be making changes. Whether you’ll be making changes at the end of a week/pay period or making your changes the day after they happen.

If you’ll be making your changes the day after they occur:

1. Leave the *Date Range Filter* as it is by default (first day of the pay period) as well as the employee filter to show all
2. Make all adjustments for that day.
3. On the next day, click *Next Day* to the left of the *Date Range Filter* and repeat the process.

Note: If you prefer, you can click *Two Days*, this will set the date range filter to a two day interval based upon whatever *From* is set to. After that clicking *Next Day* will switch to the next two days in the cycle.

If you’ll be making your changes at the end of the pay period:

1. Set Employee Filter to a small group (around 5, make sure they all have changes needed to be made).
2. Set Date Range Filter to one week. Make adjustments.
3. Set Employee Filter to the next group.
4. Repeat 3 and 4 until all changes for first week are complete.
5. Set Date Range Filter to next week.
6. Repeat 3 and 4 until complete.

Note: Grouping employees by similar adjustments can also be useful.
Daily Pay

Daily Pay is accessed either by selecting the link in Time Approval or on the Process Payroll / Review Payroll History screen. It is the final calculation step prior to loading into payroll.

Daily Pay Steps

1. If all time records have been approved in Time Approval, choose Load Schedules. Note that shifts for a specific day will not load into Daily Pay unless all the shifts on that day have been marked Approved in Time Approval.
2. Review the daily records by expanding (select the + symbol) the department weekday records as shown in Figure 3.
3. Once the departmental record has been expanded, double click on the abbreviated words for the day you would like to view in further detail or edit (Mon for Monday, etc.)
4. If no changes are required select Complete All or Complete on the rows for each department. You can leave the period partially completed and return at a later time to continue if required.
5. If all records have been marked complete the pay period is ready to be loaded into Payroll by selecting the Load Daily Pay button.

Figure 3: Daily Pay Department View
Accessing Further Information

If further review of the Daily Pay records is required you can select the other tabs, By Employee, or By Pay Code.

Employee view provides a summary of scheduled and actual hours worked by an employee and can be expanded by clicking the + symbol on their row for a complete breakdown by pay code.

Pay Code view provides a summary of hours for the entire period and can be expanded to view the individual employee records.
**Daily Pay Actions**

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<tr>
<th>Button</th>
<th>Description</th>
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<tbody>
<tr>
<td>Prev PP</td>
<td>Use this button to move backward in time. Clicking this button will display the information for the previous pay period.</td>
</tr>
<tr>
<td>Next PP</td>
<td>Use this button to move forward in time. Clicking this button will display the information for the next pay period.</td>
</tr>
<tr>
<td>Refresh</td>
<td>The refresh button will turn Green every time you open a work day window. This button indicates there might be some changes in the actual hours for that day. Click refresh to see the updated information in the summary screen. Note this button DOES NOT trigger any calculation; it is just to refresh the actual hours information you can see from this window.</td>
</tr>
<tr>
<td>ReCalc PP</td>
<td>Recalc is used every time a change is made in one of the days. The text on the button will turn green, indicating a recalculation is required.</td>
</tr>
<tr>
<td>Load Schedules</td>
<td>Load schedules will transfer the posted schedules data and time approval data into Daily Pay. The user will only see the departments they have access to in Scheduling.</td>
</tr>
<tr>
<td>Complete All</td>
<td>Completes the hour records for all departments and all days within the period. These records are now ready to process in Payroll.</td>
</tr>
<tr>
<td>Approve All</td>
<td>Approves the hours for all departments and all days within the period. Note that all records coming from Time Approval will already be approved, and this will only be required if records are edited in Daily Pay.</td>
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