

Time and Attendance Overview for Supervisors

Log In and Home Screen

The screenshot shows the login interface for the 'Time and Attendance Staffing and Scheduling' system. On the left, there is a header with the API Healthcare logo and the text 'Time and Attendance Staffing and Scheduling 2015.1'. Below this is a short introductory paragraph and another API Healthcare logo with the copyright notice '© 2015 API Healthcare Corporation'. On the right, under the heading 'Welcome', there is a sign-in prompt: 'Please sign in to your account'. This is followed by input fields for 'User Name', 'Password', and 'Domain' (set to 'BHSDOMAIN'). There is also a checkbox for 'Quick Badge Only' and a 'Sign In' button.

- On the login screen, enter your Active Directory User Name and Password, and click the Sign-in button. You will then be taken to your Home Page:

The screenshot displays the user's home page dashboard. At the top is a navigation bar with icons for Home, Quick Badge, Employee, Configuration, Reports, Actions, Preferences, Help, and Log Out. Below the navigation bar, the user is greeted with 'Good Afternoon, Rick'. The main content area is divided into two columns. The left column contains several widgets: 'My Announcements' (with a message that announcements do not exist and an 'Add Announcement' button), 'My Unread Messages (36)', 'My Transaction Requests', 'My Requests to Work', 'My Unavailability Requests', 'My Trade Requests', 'My Schedule', 'My Calendar - Month View', and 'My Bookmarks'. The right column contains a vertical list of dropdown menus: 'Employees With Exceptions Counts', 'Employee Pending Requests', 'Employee Overtime Percentages (Actual)', 'Employee Approval Percentages', and 'My Expiring Licenses'.

- You will notice that your Home screen consists of two panes.
- The left pane displays the information below, which relates to your employment:

My Announcements and My Unread Messages Cards

- Announcements and messages are two methods of communicating within Staffing and Scheduling. The My Announcements card is updated when any special information needs to be communicated to all or groups of employees.
- My Unread Messages Card contains messages directed to you personally. You can click on the yellow folder next to a message to open a screen where you can delete or mark it as read or unread.

My Transaction Requests Card

- The My Transaction Requests Card displays requests that you have made for yourself for calendars, clockings and adjustments. In the status column a blue OK means the request has been approved. Requests that are still pending will have a checkmark and can be changed or cancelled. You can see more information by clicking the folder next to the request to open it. If a request has been approved, you will see an "OK" in the Status column.

My Calendar - Month View Card

- The My Calendar - Month View Card allows you to see a view of your calendar a month at a time. The large letter "S" denotes a schedule. To see the details, rest your mouse on the "S". This view will also show requests and Calendars.

My Bookmarks

- The My Bookmarks card displays shortcuts to frequently-used screens within Time & Attendance. You are able to customize the bookmarks using the Preferences tool.

- The right pane contains information cards which relate to your role as a supervisor. These cards contain information and links to Employee LaborViews. LaborViews are the most important tool to help supervisors manage their employees' requests and any exceptions that may affect an employee's pay.
- The colored bars and graphs within these information cards are links to LaborViews. Clicking on a graph or chart will take you to the LaborView screen.
- The LaborView screen provides a one line summary of each of your employees that fit a certain circumstance. For example, employees who have at least one critical exception.
- **As a supervisor, it is important to check the following three LaborViews daily: the Employee Pending Requests, Employees With Exception Counts, and the All Employees Laborview.**

Employee Pending Requests

- The Employee Pending Requests card has a graph showing the Calendar and Clocking requests for the current pay period, that are waiting for supervisor approval.
- Clicking on a colored bar on the chart OR on the legend will open the appropriate LaborView.
- For example, clicking the red bar on the chart will open the calendar requests LaborView. Clicking on the orange bar will open the clocking requests LaborView.

Employee With Exceptions Counts

- This information card displays the number of your employees who have Critical exceptions, handled or unhandled exceptions, pending exceptions, or no exceptions in the pay group instance indicated by the drop down arrow.
- You may click on the chart to view any exceptions that need to be handled.
- Clicking on the red critical exceptions bar will open the Employee With Exceptions Counts LaborView.
- Within the LaborView:
 - You can sort columns by clicking on the name of the column. Click once for ascending order. Click again for descending order.
 - Clicking the folder to the far left takes you to the employee's record.
 - Clicking the icon next to the folder begins the process of sending a Carbon Copy Time Card Report to another supervisor.
 - The Role/Level column indicates if an employee is also a supervisor.
 - A blue 'OK' in the Status column indicates that the time card has been approved. A white paper icon means the record has been calculated but is not yet approved.
 - Editor Signoff indicates if the editing supervisor has signed off on the employee's time card.
 - Employee Signoff indicates if the employee has signed off that their time card is accurate
 - The columns on the right display the number of exception messages each employee has by type.
 - Click the arrow next to "Choose a LaborView" in the Actions section, in the left pane, to display a list of other LaborViews.

All Employees LaborView

- The All Employees LaborView displays all employees that you, as a supervisor, are responsible for. Each employee record must be reviewed for accuracy before approving.

Employee Search

Home Quick Badge Employee Configuration Reports Actions Preferences Help Log Out

Enter your Employee (EER) search criteria:

Last Name Code

First Name

Search

Actions

Add

Clear Reset Criteria

Advanced

My Time Card

Bookmarks

Add

Bookmarks

ActiveRoster

Current Staffing Overview

Schedule

Employee Labor/View

Report Favorites

Report Favorites do not exist.

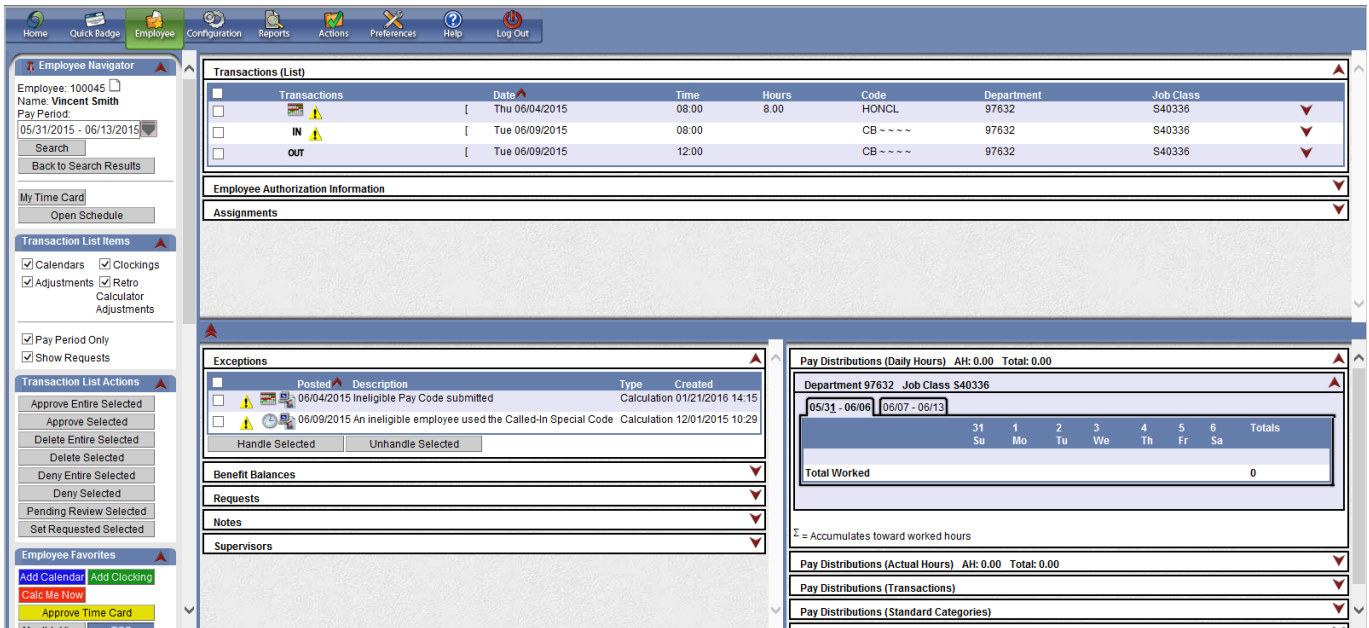
Help

The last name of the employee.

[More...](#)

- The first time you click on the Employee icon from the home page you are taken to the basic employee search screen. If you leave the fields blank and click Search it will return every employee currently assigned to you.
- The Advanced search option provides additional fields used to narrow your results. In the Advanced search are several tabs: General, Labor Distribution and Classification. The options in these tabs allow you to narrow down your employee search.
- For example, In the General Tab you may type codes into the empty fields to search by an employee's status, badge number or hire date.
- Once you click Search, you can click the check boxes next to individual employees, or click the "All" box at the top of the results list to select all employees.
- Clicking a folder next to an employee's name will take you to their Time Card Screen.
- When multiple employees are selected, you can toggle through all of them by using the RED arrows at the top of the Employee Navigator to take you to the next record or the previous one.
- To return to the Employee Search screen, click either Back to Search Results or the Search button.

Time Card Screen



- This view displays an employee's Time Card Screen, or TCS.
- The TCS contains important information about the employee, such as benefit balances, clocking and calendar transactions, and pay distributions.
- To view your own TCS, click the My Time Card button.
- The Employee Time Card Screen is divided into several sections.
- The top portion of the Employee Time Card Screen shows the Transactions List or Grid. The Transactions List displays an employee's daily timecard transactions for the selected pay period.
- The Transactions List will include transactions for worked and non-worked time such as PTO, jury duty and others. It will also display detailed clocking transactions and exceptions information, as well as, schedules, clockings, and calendar entries for requested and approved days off.
- By clicking the red arrow on any transaction you can see details about that transaction. You may also be able to edit the transactions to accurately reflect clockings and calendars.
- To collapse the transaction details, click on the red arrow again.

- The lower portion of the Employee Time Card Screen is divided into two sections. The left side shows information such as exception messages, benefit balances, pending requests, notes added on this employee's time card, and a list of supervisors. The right side contains the Pay Distribution information cards for the selected employee for the pay period.
- The first item on the left side of the bottom portion of the TCS is the Exceptions card, which may display messages related to the employee's timecard transactions. Some messages may be informational only. Others may be related to specific issues that can impact the accuracy of an employee's TCS Pay Distributions.
- The Benefit Balances information card displays the employee's earned benefit (or PTO) units. For each benefit category, the beginning and ending balances for the current pay period are displayed.
- The Requests card lists any calendar or clocking requests that the employee has made, that require supervisor approval.
- The remainder of the cards in this pane display additional employee information, such as notes, current supervisors, auto labor distributions, and Attendance+ transactions.
- Included on the right side of the bottom portion of the TCS are the Pay Distributions (Daily Hours) card and the Pay Distributions (Actual Hours) card. To open the cards click the red arrows.
- The Pay Distributions (Daily Hours) card displays the calculated results of the transactions posted in the Transaction List at the top of the TCS, by Week. The Totals include Worked, Non-Worked and overtime hours.
- The Pay Distributions (Actual Hours) card displays the calculated results of the transactions posted in the Transaction list or grid at the top of the TCS. "AH" represents the Approved Hours an employee is approved to work each pay period. "Total" reflects the calculated hours for all posted worked and non-worked transactions. At the end of each pay period, the total hours by pay code are submitted to the Payroll Department for paycheck processing.
- The Pay Distributions (Daily Hours) card and the Pay Distributions (Actual Hours) card should be reviewed regularly for accuracy.

- The left portion of the Employee Time Card Screen shows several different sections, including:
 - The Employee Navigator, which allows you to move forward or backward through the list of selected employees.
 - The Transaction List Items card offers some filtering options for what displays in the Transactions list. For example, when Clockings is unchecked, you will no longer see the in and out punches for the worked time.
 - The Transaction List Actions card contains action options that you will use if you have the permissions to approve, delete or edit items in the Transaction List.
 - The Employee Favorites card contains the most used buttons, such as, Add Calendar, Add Clocking, and TCS.
 - The Employee Actions card allows you to add an adjustment or a note to the time card.
 - The Employee Sections card allows you to view all information associated with the employee; general information, licenses, labor distributions, etc.

Supervisor Responsibilities

- In order for employees under your supervision to be paid correctly, you will need to approve their timecards.
- Before a timecard can be approved, all warning and critical exceptions need to be corrected and handled, and all requests for clockings and calendars need to be approved or denied.

Warning Exceptions

- Exceptions should be handled before the final approval of the time cards is made.
- One way to handle warning exceptions, is to click on the correct LaborView on the Employees With Exceptions Counts card on your home page. Once in the LaborView, click the Select All checkbox to select all employees under your supervision that have warning exceptions.
- You may also choose to open the Exceptions card on an individual employee's Time Card Screen. Each of the warning exceptions will be listed and are displayed with a yellow exclamation point icon.
- Warning exceptions indicate a moderate issue with an employee's timecard. If the Warning is not corrected the timecard can still be approved. It will not stop an employee from being paid, but the issue may cause the employee to be paid differently than expected.
- Issues should be corrected, but if that is not possible, the warning exception can be "handled by placing a checkmark next to the exception you wish to handle and clicking the Handle Selected button. After the exception has been handled you will see a black check mark icon appear. Once the time card has been recalculated, the Warning Exception will move to the Handled Exceptions bar graph on the Employees With Exception Counts LaborView on the Home page.

Critical Exceptions

- Critical Exceptions must be corrected before a time card is approved, in order for the employee to be paid.
- One way to correct critical exceptions, is to click on the correct LaborView on the Employees With Exceptions Counts card on your home page. Once in the LaborView, click the Select All checkbox to select all employees under your supervision that have critical exceptions.
- You may also choose to open the Exceptions card on an individual employee's Time Card Screen. Each of the critical exceptions will be listed and are displayed with a red X.
- The most common critical exception occurs when an employee fails to clock in. In this case, the critical exception will occur at the end of an employee's scheduled work week.
- There are a couple of ways to verify a missed clocking.
- Worked time is captured in Clocking Pairs. An IN punch and the associated OUT punch is considered a Clocking Pair. An employee's Transactions List will display these clockings alternately, an in punch at the start of the shift followed by an out punch at the end of the shift. If two IN punches are listed consecutively, this is an indicator that a clocking was missed.
- Another way to check critical exceptions, particularly the odd clocking critical exception, is to go to the Monthly View calendar for the employee. Employees with critical exceptions, particularly the odd clockings critical exception, will have unusual or missed clockings on the Monthly View.
- To resolve the missed clocking issue, you as the supervisor will need to add a clocking by clicking on the Add Clocking button under the Employee Favorites card in the left pane, and entering the Date and Time for the clocking
- When the system recalculates, the new clocking will be entered and the employee's worked time will be adjusted. To immediately verify that the critical exception has been corrected, the employee can be forced into calculations by clicking the Calc Me Now button under the Employee Favorites card in the left pane.
- Once the critical exception has been resolved it will no longer be displayed on the Exceptions information card or on the employee's Transactions List and the worked hours under the Pay Distribution Daily Hours information card will also accurately reflect the employee's worked time for the week.

Transaction Request Approvals

- Employees may request time off or ask that corrections be made to their time cards. They make the requests using Calendar and Clocking transactions. These transactions must also be approved or denied by the Supervisor before final timecard approval is done.
- The Employee Pending Requests information card on your home page will take you directly to employees who have made clocking or calendar requests during the current pay period. Click on the graph to go directly to those employee's records. And click on the All Checkbox to select all the employees with requests. Click an employee's folder icon to go to the employees under your supervision that have transaction requests on their timecards.

- You will be able to view a list of requests under the employee's Requests information card. On the employee's transaction list, transaction requests will be denoted with a calendar icon with a Blue R. Calendar Request icons that contain a green "+" sign means the employee wants to add a request. Calendar request icons with a red "-" [minus] sign signify that the employee wants to delete a calendar.
- Click the check box next to individual or multiple requests to approve them, then click Approve Selected in the Transaction List Actions card in the left-hand pane. Similarly, if you are deleting a transaction, use the Delete Selected button.
- Once approved, the Calendar Request icon will change to the standard calendar icon. Once the time card has been recalculated, transaction request notifications under the Requests information card will be removed. Additionally, the Employee Pending Requests card on your home page will reflect that the transaction requests have been approved and accepted by Time and Attendance.

Add Clockings

- As a supervisor, there are times when you will need to add a clocking to an employee's record. This normally occurs when an employee misses clocking in or out. Supervisors should strongly encourage employees to add their own missed Clockings and Calendar Requests.
- To add a Clocking to an employee's time card, click the green Add Clocking button in the Employee Favorites card in the left pane. On the Add Clocking screen, enter the date and start time of the clocking. The Time and Attendance system uses 24-hour Military Time. For example, for 6:45 am enter the time in the date field as 0645, 2:00 pm would be entered as 1400. Add any other information that is needed and click Save.
- The clocking will be identified with a Clocking Icon. Once the system recalculates, the icon will change to a normal in or out punch. To immediately verify that the clocking was entered, click the Calc Me Now button in the left pane of the Time Card Screen.

Add Calendars

- As a supervisor, there are times when you will need to add a calendar to an employee's timecard. Calendars capture scheduled non-worked time such as Paid Time Off (or PTO), Sick time, Jury Duty and Bereavement.
- To add an individual calendar to an employee's timecard, click the blue Add Calendar button in the Employee Favorites card in the left pane. You will be able to enter a Calendar for any date in the current pay period or in the future. On the Add Calendar Screen, enter the date, the appropriate Pay Code, and the number of hours for the Calendar event. Add any other information that is needed and click Save. Notes: The total hours entered should not exceed your Approved Daily Hours. And it is common for the shift start time to be entered.
- You can view the calendar on the employee's transaction list. However, if the calendar is in the future, you will need to uncheck Pay Period Only from the Transaction List Items in the left-hand pane.

- The Time and Attendance system also allows you to add Calendars for multiple days at the same time if the information for each one is exactly the same. This can be done in the Monthly View.
- Click on the Monthly View button on the Employee Actions card in the left pane. To select multiple consecutive dates for the Calendar entry, select the date header for the first day. Hold the Shift Key down and select the date header for the last day of the range. To select multiple dates that are not consecutive, select the date header for the first day, then hold the Control Key down and select the date headers for the additional days. To deselect any dates that may have been selected by mistake, hold the Control Key down and click the date headers to be removed.
- Once your selection is verified, click "Add Calendar" on the Employee Actions card in the left pane. Notice that the dates you selected on the Monthly View screen appear in the Add Calendar Screen. Verify the displayed dates are correct. If errors are noted, click the Monthly View button and repeat the selection process.
- Enter the appropriate pay code, time, and hours for the Calendar event. Add any other information that is needed and click Save.
- Click the Calc Me Now button on the Employee Actions card in the left pane to apply changes. This will adjust the employee's benefit balances to reflect the newly added calendars.

Approve Time Cards from the TCS

- Remember to check the following three LaborViews before approving time cards: the **Employee Pending Requests, Employees With Exception Counts, and the All Employees Laborview.**
- Once the exceptions and warnings have been handled and transaction requests have been approved, you are able to approve the employee timecards.
- In order to approve an individual employee's time card, first review to ensure all information is correct, then click the Approve Time Card button in the left pane to approve the employee's timecard for the current pay period.
- If the Time and Attendance system accepts the timecard approval, a blue OK will appear next to the employee code in the employee navigator. This employee's timecard is approved for this pay period. If any additional information is added to the employee's record after approval is accepted, you will need to return the employee's TCS and approve the timecard again.

Reports Section

- Reports are available from the Reports tab on the Sections toolbar.
- To run a report, click the folder icon next to the report you want to see. Use the field entries to refine your report content. Some fields may automatically populate. When all necessary information is entered, click on the Request Report button.
- The report will appear in the right hand pane. For each report generated, use the tools in the right hand pane to print or save the report to your computer. It is also possible to export reports to an Excel file.

Actions - Approval Card

- The Actions Section has a number of features you will regularly use as a supervisor. To navigate to the Actions section from the Home screen, select the Actions icon on the toolbar.
- The Approval card contains the Employee LaborView and Transaction Requests. This feature allows you to quickly review employees' transactions for the current pay period, manage your employee timecards and receive detailed information necessary to approve the time cards, determine which employees have critical or warning exceptions, and determine which employees have transaction requests.
- Once all exceptions and requests have been handled or accepted, you are able to approve the timecards from the Approval card under the Actions section.
- Remember to check the following three LaborViews before approving time cards: the **Employee Pending Requests**, **Employees With Exception Counts**, and the **All Employees Laborview**.
- To approve time cards, you may either click individual checkboxes for specific employees or click the checkbox in the column header to select all employees, then click the Approve Time Card button.
- Once approved, an employee's status will change to OK signifying that their timecard has been approved by their supervisor and accepted by the system.
- Remember, if new data is entered for an employee, the approval status is overridden and only timecards for the current pay period can be approved.
- You are also able to view Transaction Requests from the Approval card under the Actions section. Although transaction requests can be reviewed on the Time Card Screen, using the option on the Approval card allows you to sort and filter the requests to see more detail.
- Enter the search criteria and click the Search button. You will receive a list of employees with the selected search criteria. To review any employee's Time Card Screen, click the folder icon next to the employee's name. You will be able to review or approve requests from the employee's TCS.

Actions - Employee Card

- The Employee card in the Actions Section contains features that pertain to your account in Time and Attendance. You can forward your assignments to other supervisors, change your password or PIN numbers and access the messages feature. To navigate to the Actions section from the Home screen, select the Actions icon from the toolbar.
- Auto Forward Assignment allows you to temporarily transfer your employees and timecard approval rights to another supervisor. This feature is useful when you are going to be out of the office temporarily, such as when on vacation.
- The supervisor you forward your employee's to must have the same level of permissions that you have to ensure that all transaction activities can be completed as expected.
- To begin the auto forward process, click on the Employee Forward button in the left pane.
- Fill in the date when you would like the forwarding assignment to begin.
- You can enter an expiration date, but one isn't required. Auto forward can also be disabled manually.
- You can search for a specific supervisor using the name fields or click the search button to find a list of eligible supervisors.
- Select the Supervisor's name you want to auto forward your employees to by selecting the ABC icon to the left of their name.
- Select the employees you would like to forward by placing a checkmark in front of each name. Or, you can select the top 'Select All' box to forward all employees to the selected Supervisor.
- Click Forward Selected on the left pane.
- The Auto Forward is complete. The employees selected are now being auto forwarded until the expiration date, if one was set, or until this feature is turned off using the Disable Auto Forwarding button.

Actions - General Card

- The Action section contains more features to assist you in customizing Time & Attendance to meet your needs. Navigate to the Actions section from the Home screen, by selecting the Actions icon from the toolbar.
- The General card contains the Announcement option. Here you can view system and department wide announcements.

Preferences Section

- The Preference Section allows you to customize various Time and Attendance screen displays. To navigate to the Preferences section, from the Home screen select the Preferences icon from the toolbar.
- The Preferences section contains a feature called Event Subscriptions.
- Event subscriptions can be set up to alert you of specific employee, supervisory or managerial notifications.
- Event subscriptions options are determined by your authorization role within your facility. Your event subscriptions will be displayed on the Event Subscription page.
- For each subscription, there is an option to receive notifications through the Time and Attendance portal or by email. Mandatory notifications are set by your facility as part of your authorized role.
- To subscribe to the event, click the checkbox under the Portal column.
- Notifications will be displayed under the My Unread Messages card on your home page. To review the notification, click the folder to the left of the notification
- The notification will contain important information about the event and will allow you to approve, handle or respond to the event in a timely manner.

Help Section

- The Help section is a searchable feature that will provide information you need quickly.
- The Help section is location sensitive. For example, if you are on the Time Card Screen you can select Help from the toolbar and a separate window will open displaying information specific to the TCS.
- The left pane contains the Table of Contents. The right pane displays the results of what is selected on the left pane. You may click on any item in the table of contents to view the desired section. You may also expand or collapse sections of the table of contents by clicking the black "+" signs.
- The Index tab is also available in the left pane. The index is an alphabetical listing of topics found throughout Time and Attendance.
- The Help section also offers a keyword search option. Enter a keyword or phrase in the search bar, and then click GO. A listing of topics will appear in the left hand pane.

Log Out Section

- When you are finished in the Time and Attendance portal, it is important to remember to log out to ensure confidentiality and security.
- To log out properly, click on the Log Out icon on the toolbar.
- You will be returned to the Sign In page.