Manager Approvals for Temporary Staff & Active Retirees

Description: This Quick Guide provides the steps necessary to manage approvals for temporary staff and active retirees in My Time.

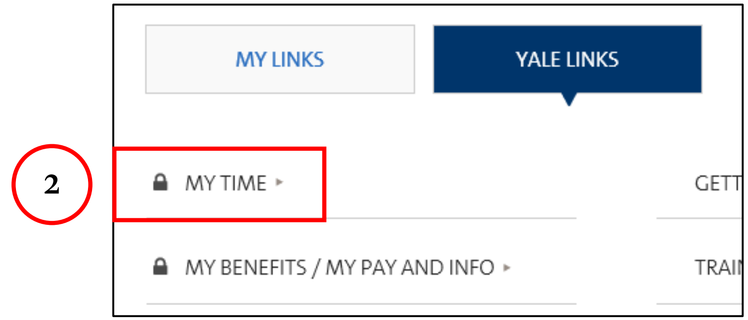
Steps to perform the following processes are included in this guide:

- Manager Approvals for Temporary Staff & Active Retirees
- Editing Time
- Entering Charging Instructions
- Temporary Employee Hours by Labor Account report
- Connecticut Sick Time – Accruals
- Entering Charging Instructions in My Time (Lite)

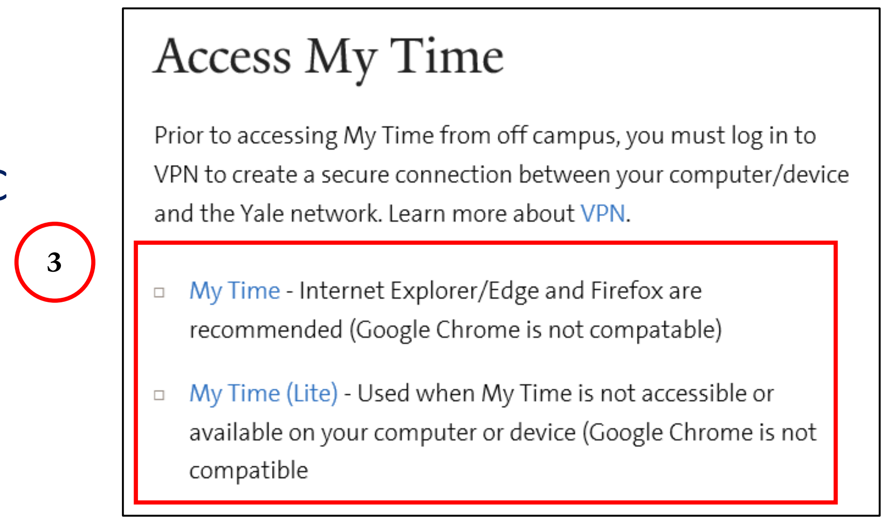
Manager Approvals for Temporary Staff & Active Retirees

1. Open an internet browser and go to your.yale.edu.

2. On the *It's Your Yale* homepage, click **My Time**.



3. Select the link to access My Time.
   - ➢ If you are using Internet Explorer on a PC (recommended), click **My Time**
   - ➢ Otherwise, click **My Time (Lite)**.



Manager Approvals for Temporary Staff & Active Retirees (cont.)

4. Log in with your **NetID** and **Password**.

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5. Under *My Genies®*, Click **Pay Period Close**.

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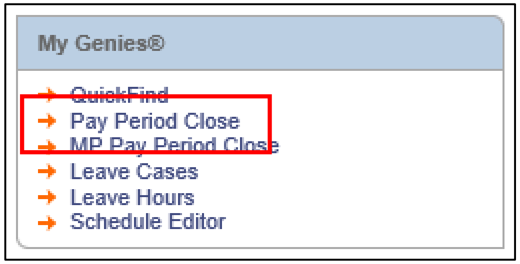

6. Click the **Show** field.

7. Click **Temps/Active Retirees**.

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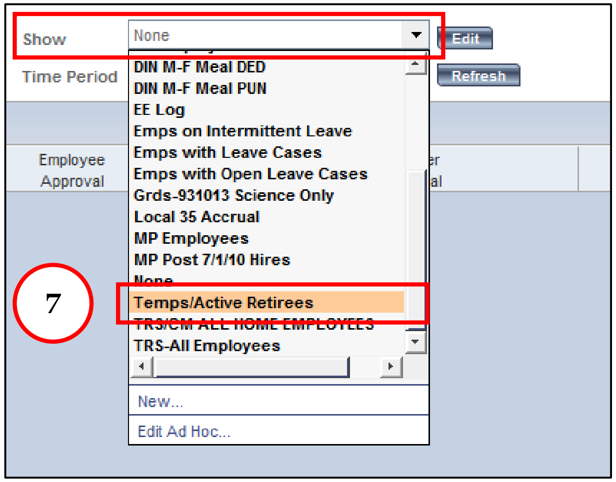
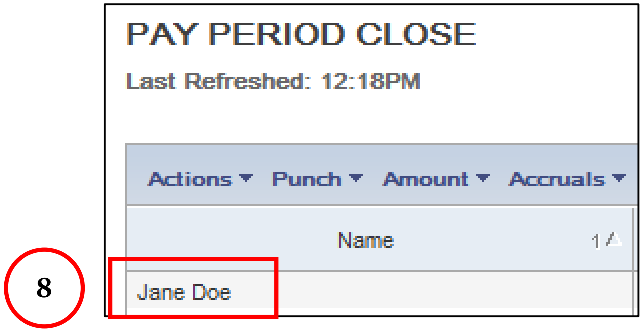
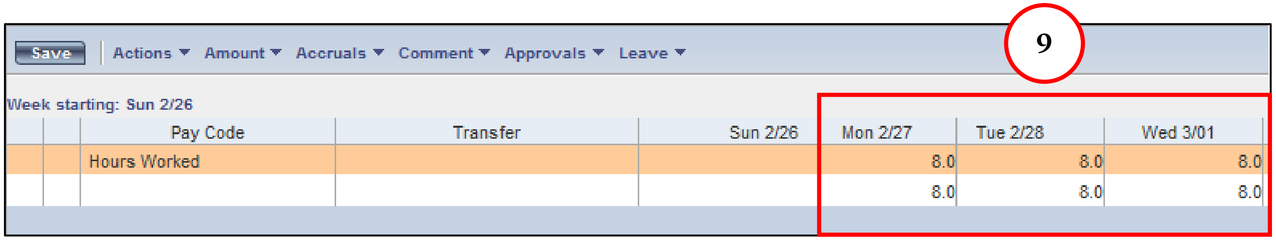


Manager Approvals for Temporary Staff & Active Retirees (cont.)

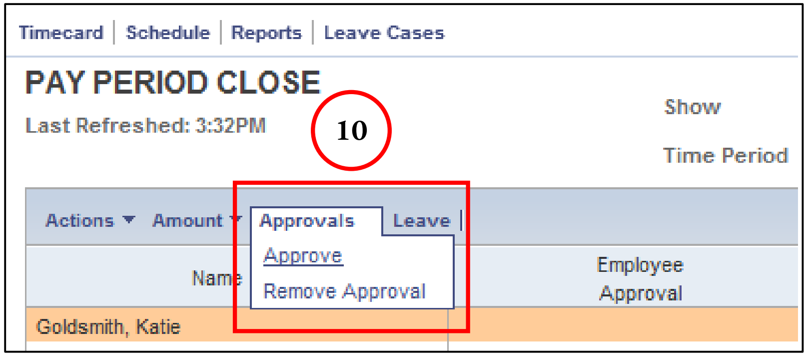
8. Double-click the employee's name to edit their timecard.
   - ➢ My Time (Lite) users should click once on the name, then click **Timecard** in the upper-left corner of the screen.



9. Review entered time prior to approval.

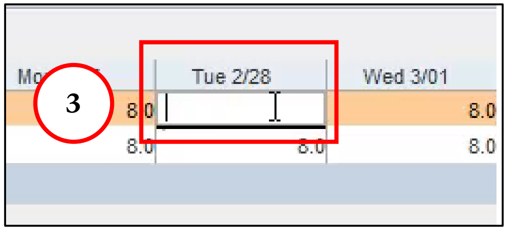


10. Click Approvals, and then click **Approve**.



Editing Time

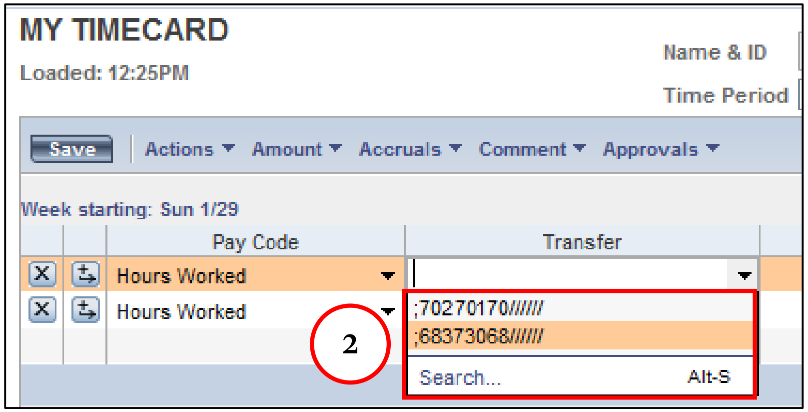
1. Follow Steps 1 through 8 under [Manager Approvals for Temporary Staff & Active Retirees](#).
2. Double click the employee's name to edit their timecard.
   - My Time (Lite) users should click once on the name, then click **Timecard** in the upper left corner of the screen.
3. Click the box below the date you would like to change and type in the correct number of hours.

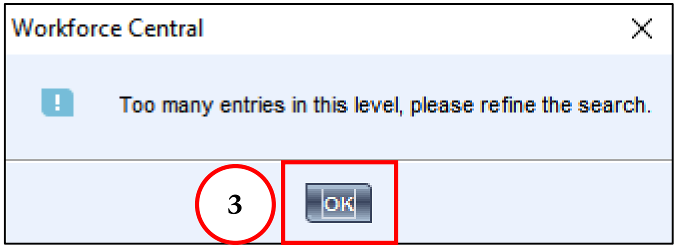


Entering Charging Instructions

Default charging instructions and hourly rate are sent from Workday to My Time. The following steps illustrate how to enter alternate charging instructions in My Time, including an alternate supervisor or hourly rate. If a set of alternate charging instructions has already been entered in My Time, you can copy and paste it from the Temporary Employee Hours by Labor Account report. See Page 9 for instructions on how to run that report.

1. Follow Steps 1 through 8 under Manager Approvals for Temporary Staff & Active Retirees to choose your employee.
2. Click on the appropriate cell in the **Transfer** column, click the correct charging instructions (if shown), or click **Search**.
3. Click **OK** any time you see this message.

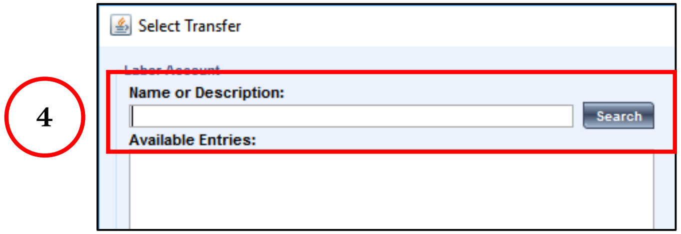




Entering Charging Instructions (cont.)

4. In the Name or Description field, type all or part of the supervisor's last name, followed by an asterisk. Then click Search.

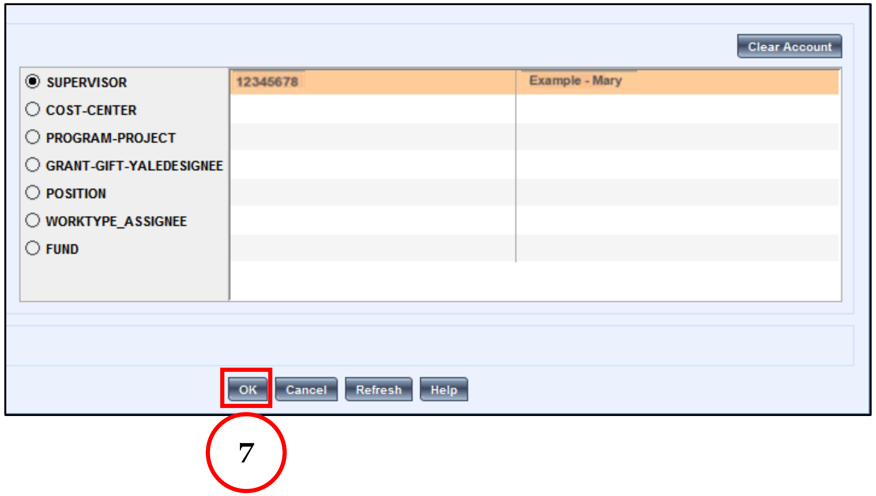
   ***NOTE**: The supervisor field only needs to be updated if you are trying to provide that alternate supervisor with visibility into this temp employee's timecard in order to review or approve it.*



5. Click the supervisor's name in the **Available Entries** field. It will appear to the right of the radio buttons.

6. Continue until all segments of the Charging Instructions have been updated that are different from the default charging instructions, making sure when searching to include an asterisk (*) after each search term that you enter in the Name or Description field.

7. Click OK.



Entering Charging Instructions (cont.)

8. If entering multiple charging instructions on one timecard, be sure to click **Save** after each row has been populated with both the charging instructions and the associated hours.

9. If you see this error message after clicking **Save**, one of the charging instructions segments is incorrect. Continue to the next step.

10. To determine which segment is incorrect, click back into the **Transfer** column, then click **Search**. Look at the columns to the right of the radio buttons. Any incorrect segment will have a value in the left column but a blank cell in the right column.

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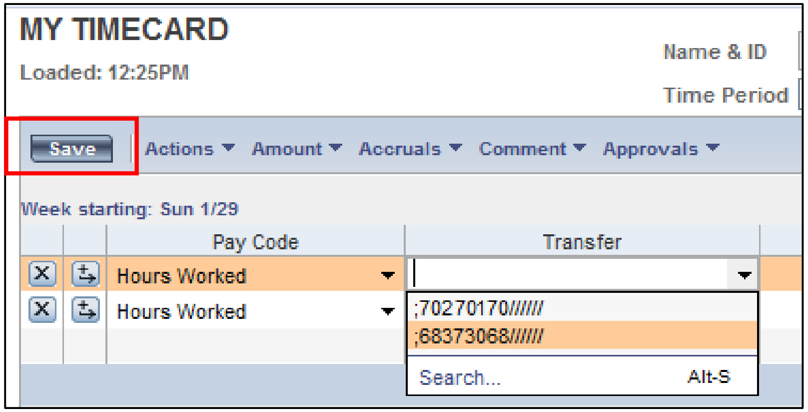

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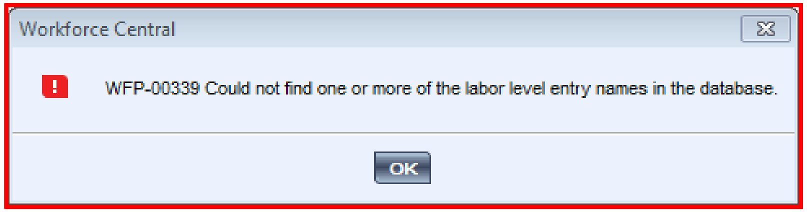

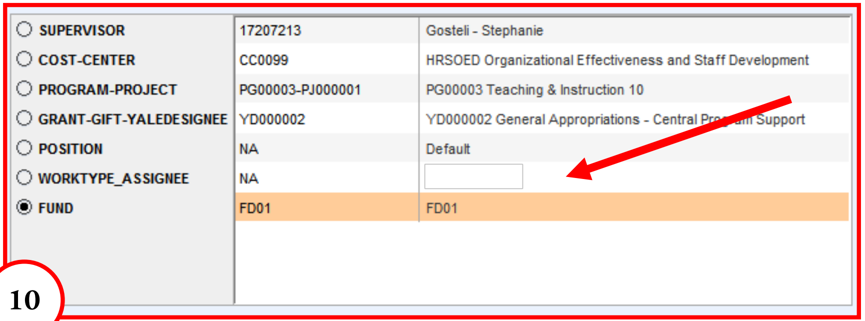

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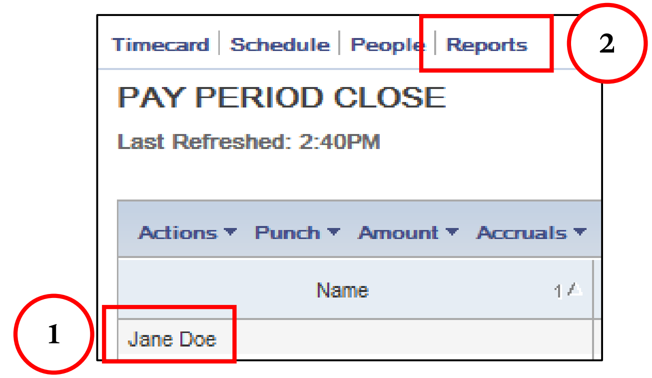
For help contact the Employee Service Center: 203-432 5552 or employee.services@yale.edu

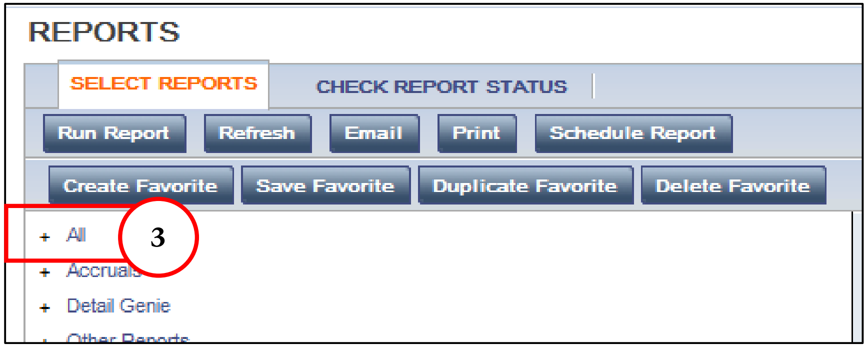
Temporary Employee Hours by Labor Account

Run this report to review time entry or to copy charging instructions to the timecard.

1. Click on an employee's name. Use the Control button on your keyboard to select more than one employee.
2. Click **Reports** in the upper left corner of the screen.



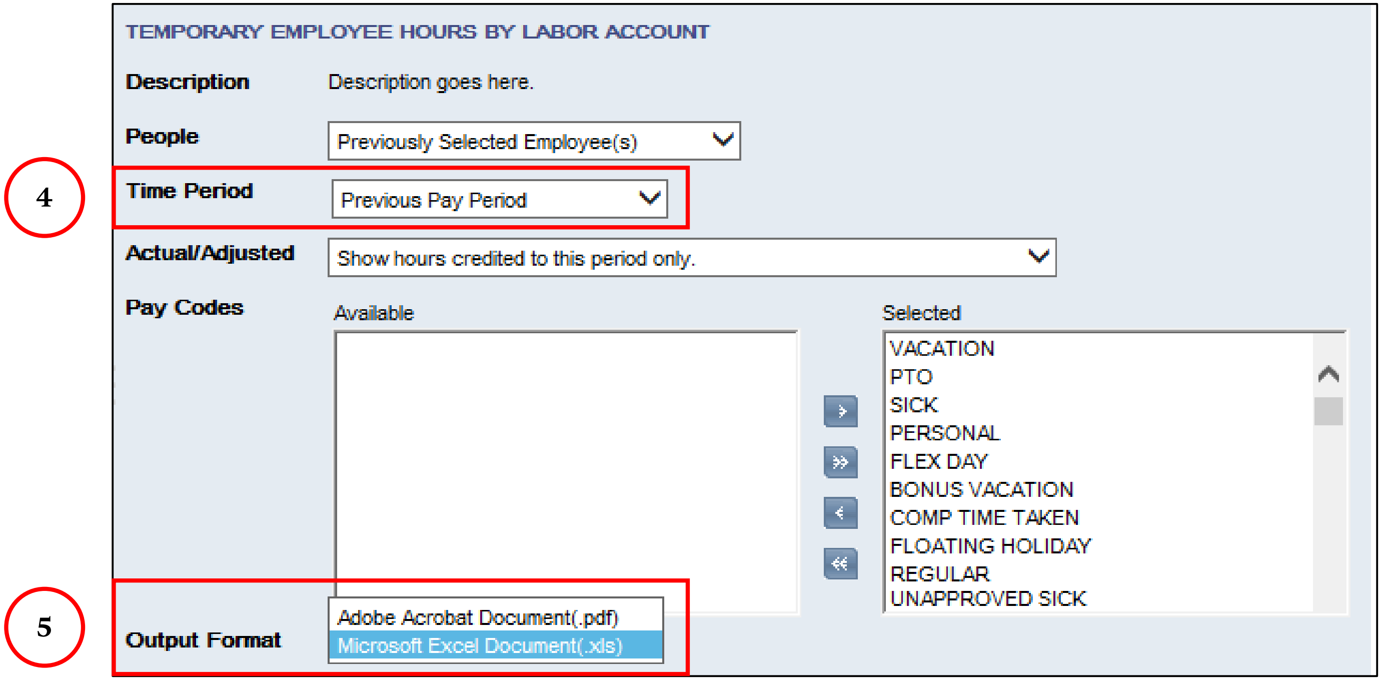
3. Click **+ All**, then search for and click on **Temporary Employee Hours by Labor Account.**



Temporary Employee Hours by Labor Account (cont.)

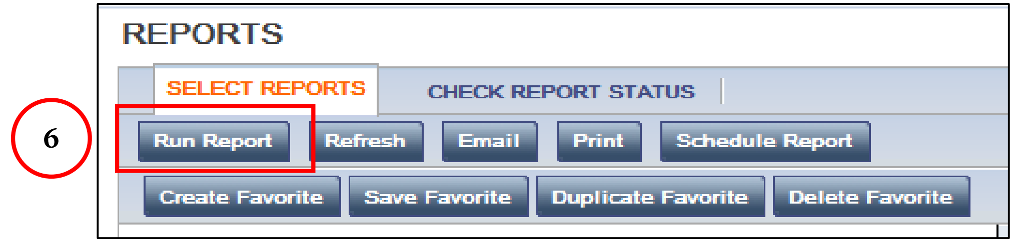
4. Click on the **Time Period** field and choose “Range of Dates” to see all charging instructions entered for these employees during that period of time.

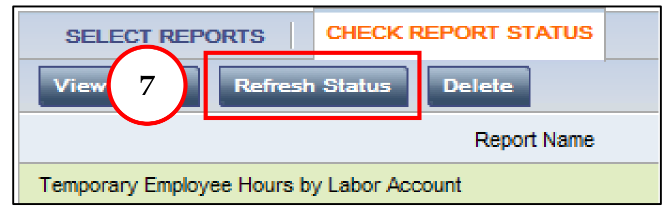
5. Change the **Output Format** to Excel.

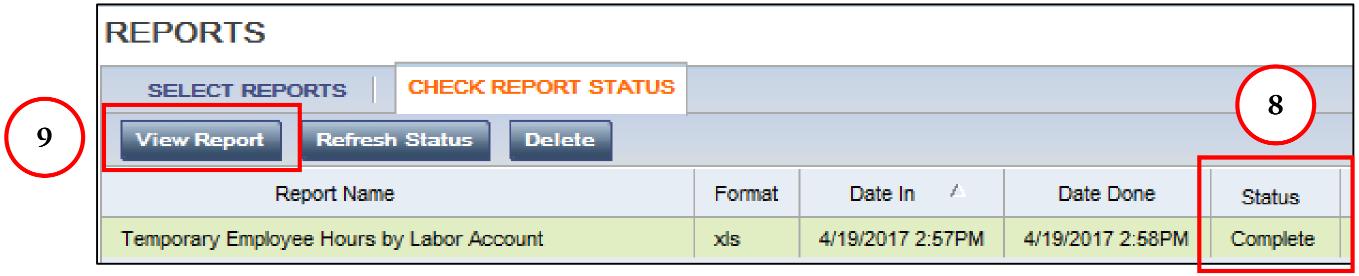


Temporary Employee Hours by Labor Account (cont.)

6. Click **Run Report.**
7. Click **Refresh Status**.
8. When the report is ready to view, the **Status** column will say *Complete*.
9. Click **View Report**.







Temporary Employee Hours by Labor Account (cont.)

10. The report will open in another window. Locate the applicable set of charging instructions in the Labor Account column, click on it, and copy it (Ctrl + C).

Employee Hours by Labor Account (Excel)

Time Period: 1/01/2017 - 4/19/2017
Query: Previously Selected Employee(s)
Pay Codes: (221): |VACATION|PTO|SICK|PERSONAL|FLEX DAY|BONUS VACATION|COMP TIME TAKEN|FLOATING HOLIDAY|REGULAR|UNAPPROVED
Actual/Adjusted: Show hours credited to this period only.
Data Up to Date: 4/19/2017 2:57:58 PM
Executed on: 4/19/2017 2:57:59 PM

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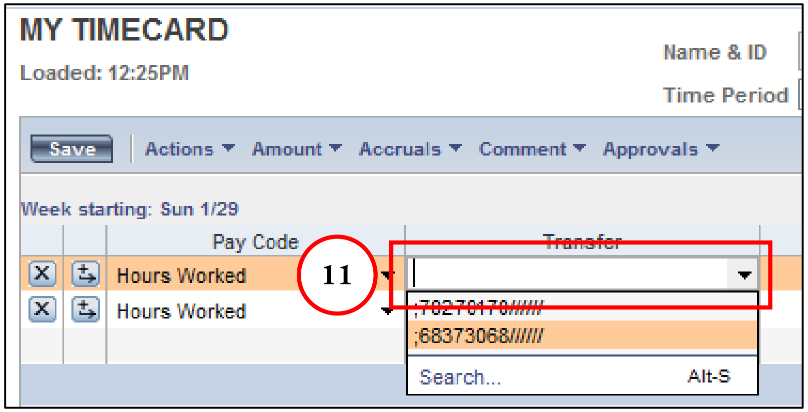
Employee Hours by Labor Account (Excel)

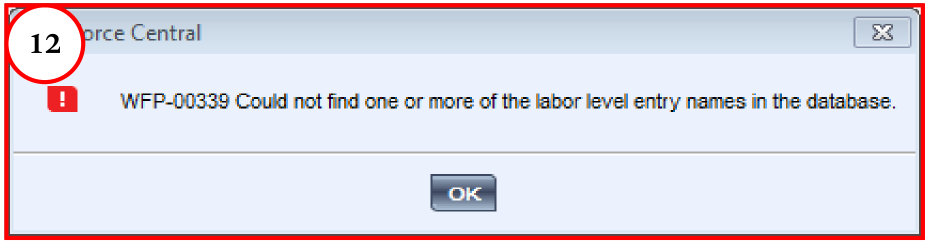
Name	Employee UPI	Pay Period Start Date	Pay Period End Date	Labor Account	Supervisor UPI	Organization	Project	Task & Award	Position/Hourly Rate
Doe, Jane	84984866	01/01/2017	04/20/2017	68478684/2452	68478684	245212	5466545	00 0001DC	$30.00
Doe, Jane	84984866	01/01/2017	04/20/2017	84657859/2453	84657859	245353	5466554	00 0059AM	$25.00
Doe, Jane	84984866	01/01/2017	04/20/2017	94635878/2400	94635878	240034	5466558	08 50392A	654
Smith, Mary	94511125	01/01/2017	04/20/2017	97634631/2453	97634631	245353	5466561	00 0001BB	$25.00
Smith, Mary	94511125	01/01/2017	04/20/2017	84478684/2097	84478684	209783	5466161	00 0001BB	$30.00
Smith, Mary	94511125	01/01/2017	04/20/2017	78986412/2278	78986412	227848	5466511	00 0001BB	$36.00
Williams, Michael	76848688	01/01/2017	04/20/2017	68478684/2453	68478684	245353	5466529	01 0001BE	068

Temporary Employee Hours by Labor Account (cont.)

11. Return to the timecard, click on the appropriate row in the **Transfer** column, then paste (Ctrl + V) in the charging instructions.



12. If you see this error message after clicking Save, see step 10 on slide 8.



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Connecticut Sick Time - Accruals

Your employee may be eligible to accrue and use sick time, and will be able to see this information under the Accruals tab as shown below. Please contact Employee Services for more information if needed.

TOTALS & SCHEDULE | ACCRUALS | AUDITS

Accrual Profile CT UNDER 20-SICK NOT USABLE

Accrual Code	Balance on Selected Date	Units	Balance Projected Through
CONNECTICUT SICK	35.0	Hour	3/04/2017

TOTALS & SCHEDULE | ACCRUALS | AUDITS

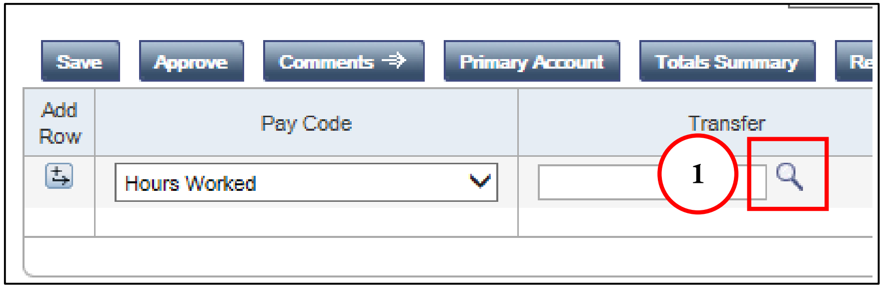
Accrual Profile CT UNDER 20-SICK USABLE

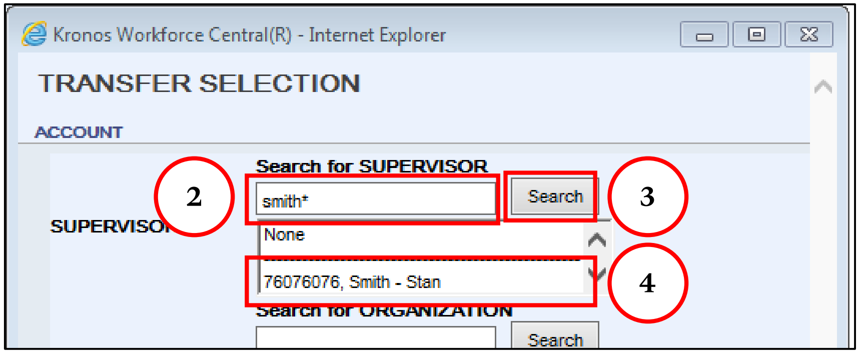
Accrual Code	Balance on Selected Date	Units	Balance Projected Through
CONNECTICUT SICK	45.0	Hour	3/04/2017

Entering Charging Instructions in My Time (Lite)

Default charging instructions and hourly rate are sent from Workday to My Time. The following steps illustrate how to enter alternate charging instructions in My Time (Lite), including an alternate supervisor or hourly rate. If a set of alternate charging instructions has already been entered in My Time, you can copy and paste it from the Temporary Employee Hours by Labor Account report.

1. Click on the magnifying glass in the **Transfer** column.
2. For each segment of the charging instructions that is different from the default charging instructions, click in the blank field under the "Search for…" heading, type all or part of the search term followed by an asterisk (*).
3. Click on the **Search** button to the right of the search field.
4. Find the correct entry below the search field, beneath the dotted line, and click on it once to highlight it.





Entering Charging Instructions in My Time (Lite)

5. Continue until you have highlighted the correct value in each segment of the **Charging Instructions** that is different from the default charging instructions. Always include an asterisk (*) after each search term.
   - **SUPERVISOR** field only needs to be updated if you are trying to provide that alternative supervisor with visibility into the temporary employee's timecard in order to review or approve it.
   - **POSITION** is where you enter an alternate hourly rate. When searching for the rate, your search term must begin with a dollar sign.
   - **WORK TYPE ASSIGNEE** should be skipped.
6. Click **OK**.