My Time

C&T Supervisors
Time Approval

August 2016
Welcome!!

We’re glad you’re here!
Time Capture Overview

1. Open an internet browser and go to the following address:
   http://your.yale.edu

2. On the homepage, click MY TIME.

3. Login with your NetID and Password.
Course Schedule

Time Approval

Time Off Request Approval

Reporting and Audits

Questions
What is changing?

<table>
<thead>
<tr>
<th>Previous</th>
<th>New</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time is tracked in multiple systems</td>
<td>My Time will become the single application for time entry across Yale</td>
</tr>
<tr>
<td>Business Offices often key-in timecard entries for employees from their paper timesheets</td>
<td>All employees will enter and submit their own time in My Time</td>
</tr>
<tr>
<td>Timecards are manually signed and approved</td>
<td>After timecards are submitted by employees in My Time, supervisors and/or designated approvers will approve the timecard in My Time</td>
</tr>
<tr>
<td>There is no standard way of tracking time off. It is either emailed to supervisors, asked for through conversation or tracked manually</td>
<td>Time off tracking will be done in My Time which will provide access to real time paid time off balances</td>
</tr>
</tbody>
</table>
### When will I begin using My Time?

<table>
<thead>
<tr>
<th>Employee Group</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Clerical &amp; Technical Employees</strong></td>
<td>For the timecard of November 8-14 C&amp;Ts will use a web-based system to record time worked</td>
</tr>
<tr>
<td><strong>Management &amp; Professional Employees</strong></td>
<td>Pilot Group – November January 2010 → June 2010</td>
</tr>
</tbody>
</table>

**Service & Maintenance Employees**

- Service & Maintenance employees will continue to use time clocks to record their hours worked
- Additional functionality regarding online time off requests has been made available

**Students & Casuals**

- Students & Casuals will continue to submit hours worked using their current method used [eTimesheets (Timesheet X), Casual time entry etc…]
How do I access My Time?

• My Time is accessed through the uPortal
• The uPortal can be found at: http://yale.edu/portal
• My Time will work on both a PC and Mac

• Users will log in to the uPortal using their NetID and password
• To look up your own NetID, type in your name e.g. “Kevin Brigham” will return: kb32
## Roles & Responsibilities

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibility</th>
</tr>
</thead>
</table>
| **Employee**                | • Complete and approve timecard in My Time on a weekly basis (C&T) or monthly basis (M&P)  
                              | • Request time off in My Time                                                  |
| **Supervisor / Designated Approver** | • Review and approve timecard in My Time on a weekly basis                      |
|                              | • Review and approve or reject time off requests in My Time                    |
|                              | • Review reports for auditing purposes                                        |
| **Business Office Support** | • Monitor submissions and approvals                                           |
|                              | • Review reports for auditing purposes                                        |
| **Central Support (Payroll / Employee Services)** | • Lock pay period                                                            |
|                              | • Schedule change and creation                                                |
|                              | • Other management activities                                                 |
My Timecard
Timecard Overview

Time is pre-populated for each day on the timecard

Home will navigate you back to the My Time homepage
^ will hide your top menu. Click it a second time to unhide the menu

Click the X to delete a row of data
Click the arrow to add a new line

Employees will be able to see any adjustments made to their timecard on the Audits tab

The Totals & Schedules tab displays the total hours worked and the related pay codes

Employees will be able to see their time off balances on the Accruals tab
Entering and Approving Time

Entering Time

- My Time can be accessed from any computer on campus
- Timecards are pre-populated with scheduled hours per day
- Only exceptions (overtime, sick time, etc...) will need to be entered weekly
- Time is entered in 15 minute increments
  - Ex: 0.25 hours; 0.50 hours; 0.75 hours

Submitting Time

- Employees submit time to supervisors by “Approving” their timecards
- Employees should approve their timecards by **End of Day** each **Saturday**
- If employees are unable to approve their timecard by the deadline, you can adjust and approve their timecard
- There are no automatic reminders for employees who have not approved their own timecards
Time Approval

Module Objectives

After completing this module, you will:

- Understand the time approval process and policies
- Review and validate employee time
- Adjust and approve time
Time Approval

- The approval process is a mandatory step in processing payroll
- The employee and supervisor are both responsible for approving the timecard
- Employees are notified of their supervisor’s approval by viewing their timecard

Supervisors must approve timecards on a weekly basis by 5 PM Monday
Time Approval Policies

Approval Criteria

• Did the employee approve their time?
• Does the time entered by the employee match their actual hours worked?
• Is time entered for each day of the week?
• Did the employee take time off? If so, is this reflected on their timecard?
• Was additional time worked entered? If so, was this approved?

Reviewing timecards for accuracy and completeness is a supervisor’s responsibility and ensures that employees will be paid correctly.
Time Approval

Approve

The following scenario guides supervisors through approving timecards:

1. Open an internet browser and go to the following address:
   http://your.yale.edu

2. On the homepage, click MY TIME.

3. Log in with your NetID and Password.
The Pay Period Close Genie allows you to view your employees’ timecards for the pay period.

Under the **My Genies** list, select **Pay Period Close**.
Highlight the employee whose timecard you would like to view by clicking on their name

3.

View their timecard by double clicking their name, or by clicking the Timecard link at the top of the page

4.

Select All Home in the Show field. If you are a business office and have broad access, choose “My Employees” to view only those who report to you.

The Time Period defaults to Previous Pay Period. To view this week’s timecards select Current Pay Period.
Time Approval

Approve

5. Review the employee’s timecard for accuracy and click Approvals.

- The Time Period automatically defaults to the current pay period.
- The pay period begins on a Sunday and ends on a Saturday.
- Review the Week Starting date to ensure you are entering or submitting time for the appropriate pay period.

Account numbers displayed are not the PTAEIO. These numbers link the employee to the appropriate supervisor.

Use the Save button on the top left of the timecard if you make an adjustment and do not want to approve the timecard at that time.
6. **Click Approve**
The **Sign-Offs & Approvals** tab displays the **Approval by Employee** and **Approval by Manager** information.
Timecard Adjustments

What if the timecard is incorrect?

• Changes can be made to timecards for which payroll has not yet been processed
• Supervisors should require that employees edit their time if it is incorrect
• If an employee is unable to adjust their timecard before the deadline, the supervisor may adjust the timecard for their employee

<table>
<thead>
<tr>
<th>IF…</th>
<th>THEN…</th>
</tr>
</thead>
<tbody>
<tr>
<td>The employee has approved the timecard</td>
<td>Do not approve until the timecard has been corrected. The employee must remove the approval before they can adjust the timecard</td>
</tr>
<tr>
<td>The employee and supervisor both approved the timecard</td>
<td>The supervisor must remove the approval before the employee can remove their approval and adjust their timecard</td>
</tr>
</tbody>
</table>

If it is necessary to request a pay adjustment after the relevant payroll has been processed, you will need to fill out the *Payroll Payment Adjustment Form.*
Timecard Adjustments

Reasons to Adjust a Timecard

• The following scenarios are a few examples of when an employee would need to adjust their timecard:
  • They were out sick unexpectedly during the pay period
  • They worked overtime
  • They are in their probationary period during which they cannot take paid time off and must reduce the amount of hours they worked
The following scenario guides supervisors through removing an approval:

1. Open an internet browser and go to the following address:
   http://your.yale.edu

2. On the homepage, click MY TIME.

3. Log in with your NetID and Password.
## Time Approval

### Remove Supervisor Approval

1. Under the **My Genies** list, select **Pay Period Close**.

**Diagram:**
- **General**:
  - Group Edit Results
  - Inbox
  - Reports
  - Actions

- **My Genies®**:
  - IS Summary
  - Leave Cases
  - Leave Hours
  - Pay Period Close
  - QuickFind
  - Reconcile Timecard
  - Schedule Editor
  - Shift Start

- **Timekeeping**:
  - Accrual Reporting Period
  - Total Hrs - Current PayPeriod
Time Approval

Remove Supervisor Approval

3. Double click on the employee’s name
Time Approval
Remove Supervisor Approval

4. Click Approvals then click Remove Approval
Manager approval has now been removed
The following scenario guides supervisors through adjusting and approving timecards.

1. Open an internet browser and go to the following address:
   http://your.yale.edu

2. On the homepage, click MY TIME.

3. Log in with your NetID and Password.
Time Approval

Adjust & Approve

Under the **My Genies** list, select **Pay Period Close**
Time Approval
Adjust & Approve

3. Highlight the employee whose timecard you would like to view by clicking on their name

4. View their timecard by double clicking their name, or by clicking the **Timecard** link at the top of the page
Click the Arrow to insert a row
Select the appropriate pay code.
Enter the **hours** related to the selected pay code.
Delete the hours originally charged to the **Hours Worked** pay code by pressing backspace on your keyboard.
Time Approval
Adjust & Approve

9. Review the timecard to ensure the daily totals are correct.
10. Click **Approvals** then click **Approve**
The **Sign-Offs & Approvals** tab displays the **Approval by Manager** information

As this scenario displayed a supervisor adjusting a timecard on behalf of an employee, the Approval by Employee information is not listed.
• If you ask your employees to work Overtime, they will add the additional hours to the Hours Worked pay code
• Time over 37.5 hours is defaulted to Overtime
• If they would like to select compensatory time in lieu of Overtime, they can move the time to the Comp Time Earned pay code
• If they work more than 40 hours, they must get paid Overtime for any hours over 40
• You will have the opportunity to approve the extra hours worked
The following scenario guides employees through adjusting their timecard for Compensatory Time and Overtime.

1. Click the **My Timecard** link to view your timecard.
2. Click the day for which you worked Overtime
3. Enter total hours worked that day
**Time Entry**
*Compensatory Time and Overtime*

1. Enter the total hours worked that day.
2. Click **Save**.
**Time Entry**

**Compensatory Time and Overtime**

- In this scenario, the employee has indicated they worked 5 extra hours that week.
- Hours above 37.5 are automatically defaulted to Overtime.
- Hours worked between 37.5 and 40 are eligible for Compensatory Time.

**OT or COMP Eligible** denotes hours that are eligible for Compensatory time.
- Right click **OT or COMP Eligible** to move the hours to Compensatory time.
- Click **Move**.
Time Entry
Compensatory Time and Overtime

7. Select **COMP TIME EARNED** in the Pay Code field.

8. Enter the **Amount** in hours.

9. Click **Ok**.
**Time Entry**

**Compensatory Time and Overtime**

The **Totals & Schedules** tab on the timecard is now updated to display the amount of hours the employee has chosen as Compensatory Time, as well as the amount of Overtime earned.
The Accruals tab will display the time and a half in hours earned towards Compensatory time.
The **Moved Amounts** tab will display the amount of hours moved from the OT or Comp Eligible pay code to the Comp Time Earned pay code.
Compensatory Time

• To use compensatory time previously earned, employees will submit a time off request with the Request Type as: **Comp Time**
The following scenario guides supervisors through approving a group of timecards

• Supervisors should review each timecard individually. However, instead of approving each timecard individually, supervisors have the option to review each timecard and then approve all timecards at once.
Time Approval

Group Approval

Under the My Genies list, select Pay Period Close.
Click **Actions** then click **Select All**
All employees are now selected
Alternately, a set of employees can be selected by clicking on an employee’s name and dragging your mouse, or by using the Ctrl function on your keyboard.

Click **Approvals** then click **Approve**.
Time Approval

Group Approval

5. Click Yes
Assigning a Delegate

- If you are going to be out of the office for a period of time, and you would like to select a temporary supervisor to approve your employees' timecards and time off requests you may select a temporary delegate.
- This is not a designated approver. To change the designated approver permanently, contact the Employee Service Center.
The following scenario guides supervisors through assigning a temporary delegate for timecard and time off request approvals.

1. Click on Actions
Time Approval
Assigning a Temporary Delegate

2. Select Manager Delegation
Time Approval
Assigning a Temporary Delegate

3. Select a Delegate from the drop down list

4. Select the Start Date and End Date

5. Select the Role
Time Approval
Assigning a Temporary Delegate

Should you decide not to submit the form, be sure to use the Cancel button on the bottom of the form and not the internet browser X button.

Click Save & Close
Assigning a Delegate

- Once the delegate form has been submitted, the delegate supervisor will receive a request notification.
- The delegate supervisor will need to accept the request.
Time Approval
Accepting a Temporary Delegate Request

The following scenario guides supervisors through accepting a delegate request

1. Click on Inbox

Click on Inbox
Time Approval
Accepting a Temporary Delegate Request

2. Double click on the Task
Time Approval
Accepting a Temporary Delegate Request

3. Select **Accept Delegation** and click **Save & Close**
Assigning a Delegate

- Once the delegate supervisor has accepted the role, they will be able to switch roles between themselves and the supervisor for whom they are a temporary delegate.
The following scenario guides switching between supervisor roles

1. Select **Switch Role: Myself**
Time Approval

Switch Supervisor Roles

2. Select the supervisor

3. Click Switch Role
You will now be able to view the supervisor’s employees’ timecards and time off requests.
Assigning a Delegate

• Should your plans change, you can cancel the supervisor delegate request
The following scenario guides supervisors through canceling a temporary delegate request.

Click on **Inbox**.
Time Approval
Canceling or Deleting a Delegate Request

Double click on the **Cancel Form**
Time Approval

Canceling or Deleting a Delegate Request

Click **Delete**
Time Approval
Canceling or Deleting a Delegate Request

4. Click **Remove Existing Delegation** and then click **Next**
Time Approval
Canceling or Deleting a Delegate Request

Should you decide not to submit the form, be sure to use the Cancel button on the bottom of the form and not the internet browser X button.
Time Approval

Canceling or Deleting a Delegate Request

6. Click Close
Now that you have completed this module, you should be able to:

- Describe the time approval process
- Understand the time approval policies
- Approve and Adjust time in My Time
- Make a historical edit
- Assign a temporary delegate
Course Schedule

*Time Approval*

*Time Off Request Approval*

*Reporting and Audits*

*Questions*
Time Off Request Approval

Module Objectives

After completing this module, you will:

• Understand the time off request approval process and policies
• Be able to review and approve or reject time off requests
Approval Criteria:
- Does the time off requested conflict with business needs or deadlines?

A notification is sent to the supervisor when an employee submits a new time off request.

If an employee cancels a time off request prior to the start date of the time off, a notification is sent to the supervisor because approval is needed for cancelled time off requests.

Paid Time Off balances are automatically validated and updated when the time off request is submitted.
Requesting Time Off

**Time Off Requests**

- Employees should request time off as far in advance as possible, following departmental guidelines.
  - My Time can accommodate requests up to one year in advance.
  - A new employee may not take paid vacation during the first six months of their employment; however, if a prior agreement has been made at time of hire, unpaid time may be taken.
  - The same rule applies for sick and personal time during the 90 day probationary period.
  - Time off approved prior to November 11 should be requested again in My Time.

**Adjusting or Cancelling Time Off Requests**

- Previously submitted time off requests cannot be adjusted.
- Employees must cancel the original request and submit another.
- Cancelled time off requests will also be sent to the supervisor for approval.
Time Off Request Approvals

Time Off Request Approval Notifications

- Supervisors will review employees’ paid time off requests before approving to ensure the time off does not conflict with deadlines and business needs.
- Employees will receive a notification of the approval or rejection to their Yale email and My Time inbox.

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The following actions can be performed by clicking on My Actions from the home page:

- **New Leave Case Request**: Used to request a Leave of Absence such as Medical Leave or Military Leave
- **Cancel Time Off Request**: Used to cancel previously requested time off
- **Leave Time Request**: Used to request intermittent leave of absence (A leave case must already have been opened and approved to use this link)
- **Cancel Leave Time Request**: Used to cancel an intermittent leave of absence request
- **Cancel Leave Case Request**: Used to cancel a leave of absence request
- **Time Off Request**: Used to request time off
Time Off Request Approval

The following scenario guides supervisors through approving or rejecting a time off request.

1. Click Inbox.
Time Off Request Approval

2. Double click on the Time Off Request message
Time Off Request Approval

3. Click Next
Time Off Request Approval

4. Review the request. Select Approve or Reject. Click Next.

Should you decide not to submit the form, be sure to use the Cancel button on the bottom of the form and not the internet browser X button.
Time Off Request Approval

5. Click **Save & Close**
Now that you have completed this module, you should be able to:

- Describe the time off request approval process
- Understand the My Time time off request functionality
- Approve or reject time off requests
Course Schedule

Time Approval

Time Off Request Approval

Reporting and Audits

Questions
Reporting

Module Objectives

After completing this module, you will be able to:

• Understand My Time reporting capabilities
• Utilize “Genies” and create “Hyperfinds”
• Use the standard reports available in My Time
My Time Reports

My Time Reporting:

- Reports: Information presented in PDF form
- Genies: Preformatted report that allows you to sort data or drill down into detail
  - Detailed Genies
  - Roll Up Genies
- Hyperfinds: Determines which employees are included

Reporting Security:

- Supervisors will only be able to view employees in their department or organization
- Example: A supervisor that only has access to view Chemistry employees will not be able to view Radiology employees
The following scenario guides supervisors through creating Hyperfinds by pre-selecting the employees you would like to view.

1. Click Pay Period Close
Click **Reports**

Select the **Time Period** you want to view

Select the employees you would like to view on the report by clicking on a name and dragging your mouse
Select the report you want to view and click Run Report

The **Show** and **Time Period** fields are grayed out as you previously selected the employees and time period you wanted to view.

The **Reports** home page will display a list of all the reports you have access to view.
The following scenario guides supervisors through saving Hyperfinds for future use.
Select the report you would like to view

By clicking on a report name a brief description will display on the right side of the page.
Click New

Employee Hours by Job

Description: Reports hours, amounts, and wages for each job/paycode in which the employee accrued hours. Provides totals for each employee and job per employee as well as grand totals.
Conditions to filter by (such as pay codes) can be found on the left menu.
5. Select the filter information and click **Add Condition**
Enter the **Query Name** and a description

Ad Hoc – will create a temporary query.
*Note: If you select **Ad Hoc** you will not be able to enter a query name – it will default to “Ad Hoc”**

**Personal** will create a query visible only to you

Click **Ok**
When you log in to view reports your Query name will display in the Show field.
My Time Reporting

The following scenario guides supervisors through viewing My Time Reports

1. Click Reports
My Time Reporting

Select the desired Report Category

2.
My Time Reporting

Select the desired report

When you are ready to view your report, click **Run Report**

Select the desired report
By clicking **Check Run Status**, you are able to view the status of the report you chose to view. The information above states that the report will be in PDF format, is still running and will be viewable on the screen.

---

**Click Refresh Status** to update the current state of the report (i.e. Running, Complete).

**RECOMMENDATIONS**

- **Click Refresh Status** to update the current state of the report.
- **Click Check Run Status** to view the status of the report.
- **Click Refresh Status** to update the current state of the report (i.e. Running, Complete).
- **Click Check Run Status** to view the status of the report.
My Time Reporting

Sample Timecard Signoff/Approval Audit Trail Report

<table>
<thead>
<tr>
<th>Name</th>
<th>ID</th>
<th>Time Period</th>
<th>Current Pay Period</th>
<th>Query</th>
<th>Comments</th>
<th>Amount</th>
<th>Edit Date/Time</th>
<th>User</th>
<th>Server</th>
<th>Client</th>
<th>Datasource</th>
<th>Type</th>
<th>User</th>
<th>Server</th>
<th>Client</th>
<th>Datasource</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diaz, Cameron</td>
<td>2938209183</td>
<td>10/11/2009 - 10/17/2009</td>
<td>Approval by Employee</td>
<td>10/7/2009 4:45:00 PM</td>
<td>CDiaz</td>
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<td></td>
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<td>kronosx.its.yale.edu</td>
<td>128.36.199.250</td>
<td>Timecard Editor</td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Approval Removed by Employee</td>
<td>10/7/2009 4:45:08 PM</td>
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<td>kronosx.its.yale.edu</td>
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<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Approval Removed by Manager</td>
<td>10/12/2009 6:58:07 PM</td>
<td>JillSmith</td>
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<td></td>
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<td>Approval by Manager</td>
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<td>Supervisor, 1</td>
<td>924820921</td>
<td>10/1/2009 - 10/31/2009</td>
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<td>10/6/2009 11:50:46 AM</td>
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<td>kronosx.its.yale.edu</td>
<td>130.132.23.96</td>
<td>Timecard Editor</td>
<td></td>
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</tbody>
</table>

Total Number of Employees: 4
Now that you have completed this module, you should be able to:

• Understand My Time reports and hyperfinds
• Access and use My Time reports
Course Schedule

*Time Approval*

*Time Off Request Approval*

*Reporting and Audits*

Questions
Do you have any final questions?
Course Summary

Now that you have completed this course, you should be able to:

- Understand the time approval process and policies
- Approve and adjust time
- Understand the time off request approval process and policies
- Approve or reject time off requests
- Understand and use My Time reporting capabilities
Course Support

• To reset your NetID password, please contact the ITS Help Desk at 2-9000
• For all other My Time questions please call the Employee Service Center at 2-5552. They will answer your question or route your call to the appropriate My Time subject matter expert