



inclusion SYSTEM



Inclusion Scheduling & Daily Approval

Quick Start Guide

Updated: October 10, 2024
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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

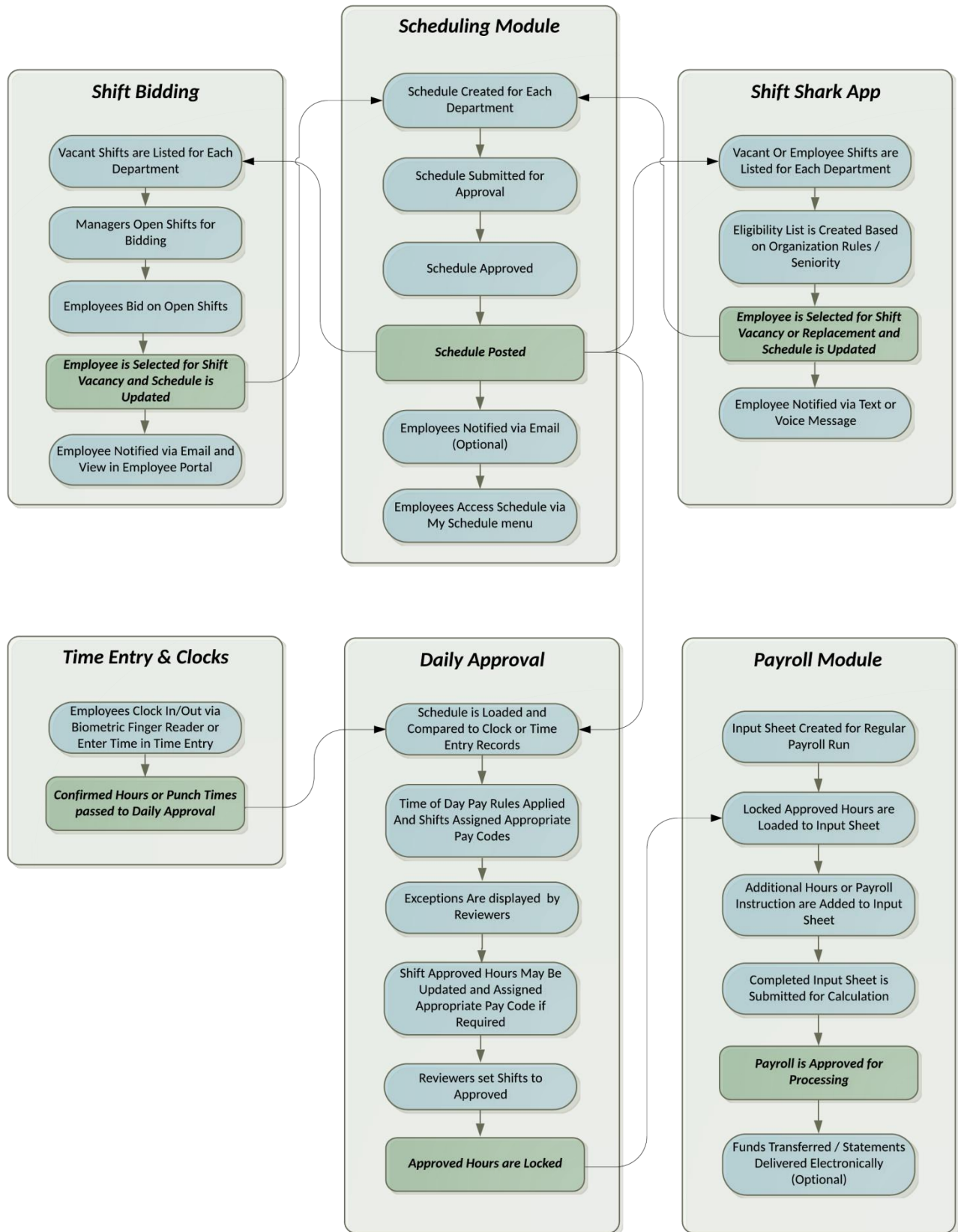
The Scheduling module provides a visual tool to build schedules on a departmental basis and easily assign staffing resources. It includes reporting on the total number of hours scheduled by individual and department and whether an individual will be approaching an overtime status, considering both actual 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.

Daily Approval - Time and Attendance

The Daily Approval module allows changes to be recorded between what was scheduled versus what was actually worked, and applies rules for your organization for those hours to allocate them to the appropriate pay code, if they have not already been pre-assigned. 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 Daily Approval module is also be connected to physical time clocks, web-based time sheets (Time Entry), or a web-based time clock (Web-Punch) to allow employees to physically record when they arrive and leave a location. Once the hours are marked as *Locked* they 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 Approval. 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.





SCHEDULING

Accessing and Viewing Schedules

From the main menu choose Schedules (note that the first time scheduling is accessed it may take a moment to load all of the graphic components to that computer).

Scheduling Screen Layout

Department: Supported Independent Living | 09-Jun-2019 - 15-Jun-2019 | View: EMPL - Week

Max Hrs: 406.00 | Total Hrs: 111.50 (13) | Vacant: 8.00 (1) | Assigned: 103.50 (12)

Freeze vacant row | Show employees in other departments

Employees: Elly Benes, David Mubvumbi, George Costanza, McCoy, Harry Harrison, Janice Jacksel, Amanda Lira

Shifts: Forest Terrace (08:00 - 16:00), Supported Independent Living (16:00 - 23:00), PT / Relief Support (08:00 - 16:00)

Schedule View Options

By default the calendar will be displayed by week, to adjust select one of the options in the view and period menu.

View: Rotation (1), Department, Employee, Rotation (2)

Period: 4 Weeks (3), Day, Week, 2 Weeks, 3 Weeks, 4 Weeks (4), Month

- **Department** will display a traditional calendar with employee names in the boxes representing their shifts.
- **Employee** will display employees on the left side with a tile indicating their shifts.
- **Rotation** will display shifts in a rotation and employees with non-rotation shifts on the left side with a tile for either type of shifts.



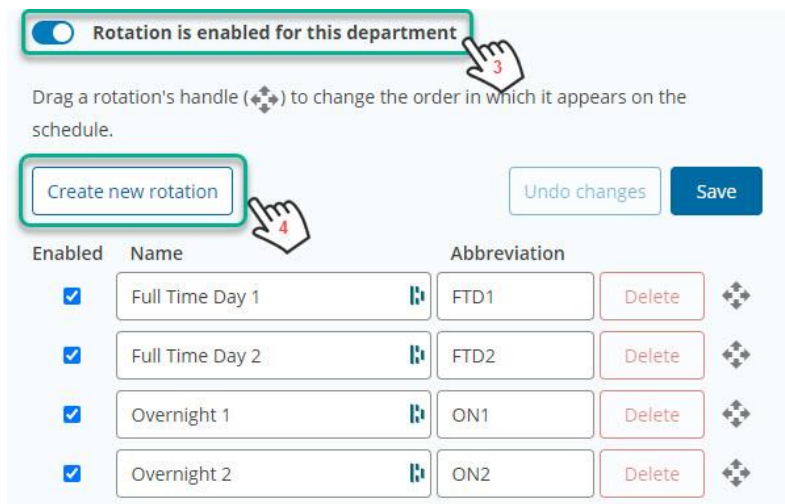
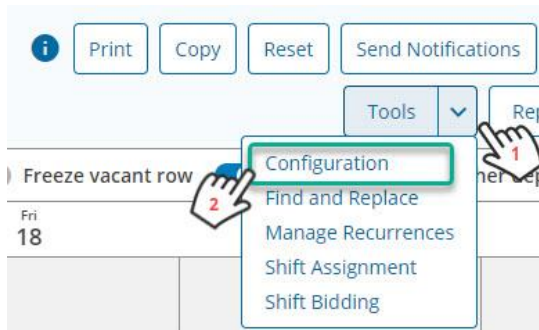
Using Rotations

Rotations help plan the daily coverage for your program and assist when an employee moves in or out of a position by grouping their shifts together, allowing you to find and replace the shifts with another employee.

Rotation labels are optional and are unique to each department or program.

Steps for adding rotations

1. Select the *Tools* menu in the upper right corner of the scheduling screen
2. Select *Configuration*
3. Enable rotations for the department
4. Select *Create new rotation* for each rotation for the program.



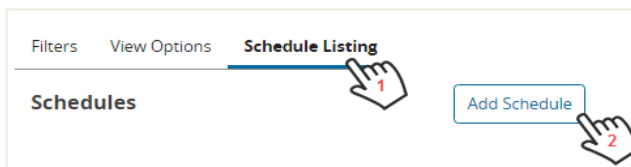


Creating / Opening Schedule Periods

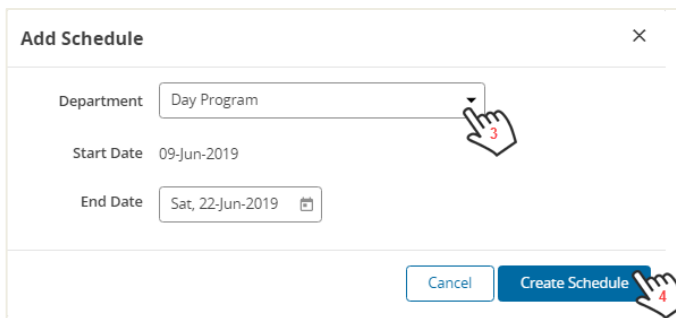
Schedules are broken down by department and when added will use the default schedule period length set for the organization.

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.





Steps for creating or modifying shifts

1. **Double click** on the day (or start time) and the shift editor will then open.
2. 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. If this shift is part of a rotation, select the label.
5. Add payroll notes if desired. This information will flow through to Daily Approval, but will not be visible to the employee.
6. Add a shift description if desired, to communicate details about this shift. This information will be displayed on the printed schedule and visible on the employee's schedule on the employee portal.

Edit Shift [Close]

Shift Details | Pay Codes

Start Date: Wed, 16-Mar-2022 [Calendar] | Start Time: 08:00 AM [Clock] | End Date: Wed, 16-Mar-2022 [Calendar] | End Time: 04:00 PM [Clock] | Duration: 8h 00m

Department: Forest Terrace | Employee Name: George Costanza | Position: Residential Support Worker | Rotation: Full Time Day 1

Description: Keep when copied | Payroll Notes: Keep when copied

Description: Notes typed here are displayed on the employee schedule and printouts (69/540)

Payroll Notes: Notes typed here are private and go to Daily Approval (53/220)

Recurrence: Weekly | Every 2 weeks, Wed Fri | No end date | [Edit Recurrence Series](#)

[Delete Shift] [Cancel] [Save]

Callouts:
- "Hover over for information about this employee's hours" points to the Duration field.
- "Repeating shift (recurrence) details" points to the Recurrence field.



Using Recurrence

Shift recurrence can be used to set a shift to repeat on a daily, weekly, or monthly basis at an interval you choose. Keep in mind that if your schedule rotation is every 2 or 3 weeks for example you will need to create the original set of shifts starting on the appropriate day and date.

1. Choose the Recurrence tab
2. Set the type
3. Set the frequency to repeat
4. Select the days (if applicable) to include in the rotation

Add Shift

Shift Details Pay Codes **Recurrence**

Recurrence
Weekly

REPEAT
Every 2 week(s) on

SUN MON TUE WED THU FRI SAT

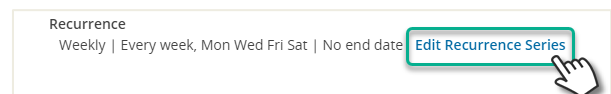
RECURRENCE RANGE
Start Date: Wed, 12-Jun-2019
End Date: No end date
 End After 1 occurrences
 End By Tue, 11-Jun-2019

Wed, 12-Jun-2019
08:00 - 16:00 (8h 00m)

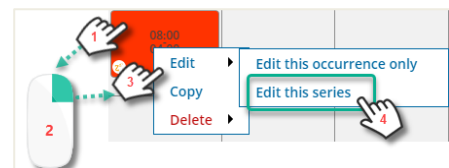
Cancel Save

- Set to continue indefinitely, by choosing “No end date”, or specify the number of occurrences or end date. Note if a recurrence is set to “No end date”, you can return and modify it in the future if it does need to change or end.

To change / edit a recurrence click on the shift and then select the Edit Recurrence Series option.



You can also right click on a shift and chose Edit > Edit this series





Over-riding how a shift should be paid using paycode allocation

An override using an allocation will force the shift to be paid as set in the allocation, ignoring the standard rules set in the system

1. Select the Pay Codes tab
2. Select Add Pay Code
3. Choose the pay code type
4. Enter the desired number hours. (The system will only allow you to enter hours up to the length of the shift).

Edit Shift [Close]

Shift Details **Pay Codes**

Add Pay Code

Thu, 13-Jun-2019
16:00 - 23:00 (7h 00m)

Pay Code	Balance (hrs)	Hours	Create Vacant Shift
Vacation hours	83.18	7.0	<input checked="" type="checkbox"/>

Remove

If the hours are for time off such as sick or vacation, the current available balance for the employee will be displayed so they can be scheduled appropriately and will update once the allocation amount is entered.

A replacement shift can also be created automatically by choosing “Create Vacant Shift” to ensure staff coverage.

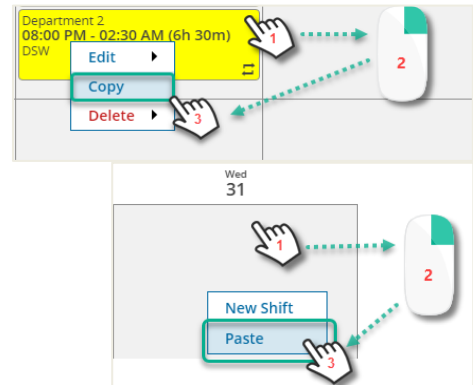


Copying shifts

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 to another:

1. From the top right of the schedule, select Copy
2. Make adjustments as needed using the Copy Shifts setup tool, and click copy at the bottom of the tool when done.

Copy Shifts

FROM: Start Date: Mon, 01-Apr-2019, End Date: Tue, 30-Apr-2019

TARGET: Start Date: Wed, 01-May-2019, End Date: Thu, 30-May-2019

Department: Admin

OPTIONS:

- Copy with employee assignments
- Copy with pay allocations
- Copy time off
- Ignore vacant shifts

COPIED SHIFTS SHOULD:

- Merge with existing shifts in target period
- Replace existing shifts in target period

MINIMUM TIME BETWEEN SHIFTS SHOULD:

- Copy with out modification
- Copy as vacant

Buttons: Cancel, Copy

When choosing a date range, note the Target end date will adjust automatically so the number of days in both periods are equal.

Use merge to keep shifts already in the target period - replace to delete the existing shifts and add the copied shifts.

If shifts already exist in the target period and there is a conflict, the copy can still be forced with the employee assignments from the original period or changed to vacant.

Employees in the copy period will also be copied forward - if unselected all shifts will be vacant. Other options control the types of shifts to be copied.

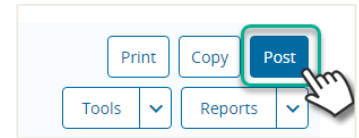


Making Adjustments

After a schedule has been created with set recurrences or copied from an existing period, changes may need to be made. Any additions or deletions of shifts that relate to the hire or termination of employees, or planned time allocations (vacation, sick time, etc.) should 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 schedule notifications select Post from the top right of the schedule.



(Optional: Your organization may opt to have a two step approval process for schedules, in which case the steps for submission are Submit, followed by Approved, then Post)

After a schedule is posted and you make changes, click [Send Notifications](#); this will send a notification email to all those who are affected by any changes made.



Using Scheduling Filters and View Options

Scheduling view options and filters can be applied to reduce the number of shifts shown on the screen, sort in a particular order or change the time display from 12 to 24 hour clock.

For example to show only *Full Time – Perm* employees and then sort the schedule by total hours scheduled per employee

Open the left side panel

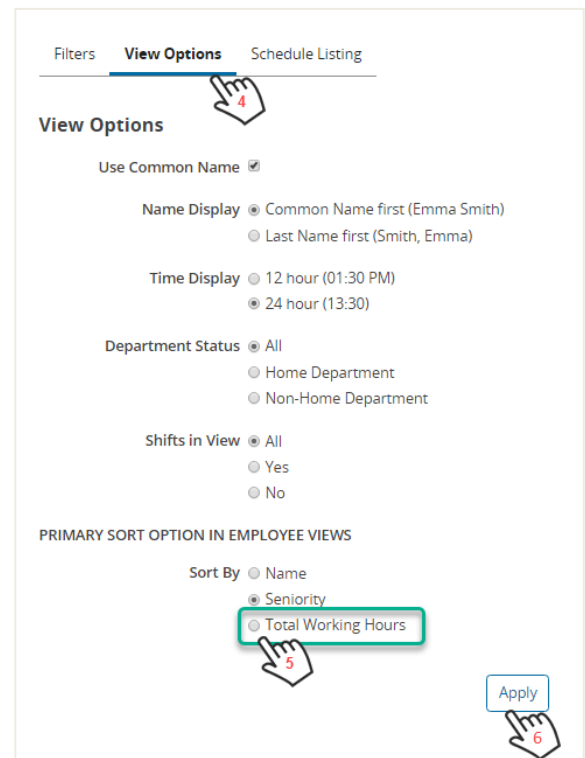
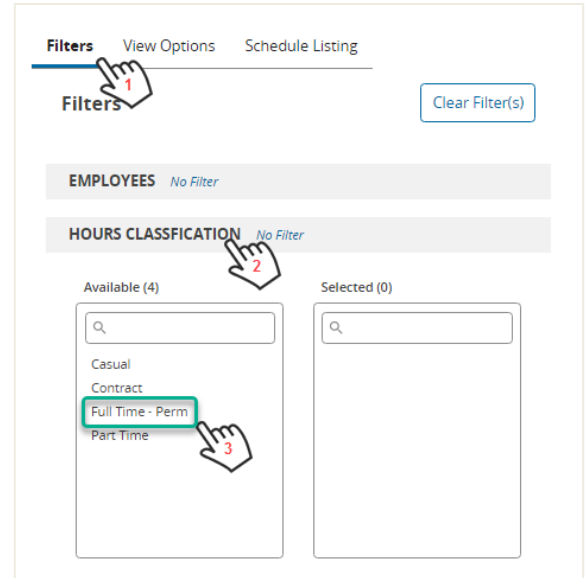
1. Click on Filters
2. Click on the title of the filter you want to set, for example *Hours Classification*
3. Select the classification
4. Click on View Options
5. Click *Total Working Hours*
6. Choose Apply

Your filter choice will be remembered and used when you open other schedules.

Choose Clear Filters to return to showing all employees

Types of Filters and View Options

- Employee(s) – show only the employees selected
- Hours Classification – show only those employees with the chosen classification
- Pay Code Allocation – show only those shifts that have a preset allocation such as vacation
- Name – to change order, and use the employees' common name
- Department Status – *Home Department* will list only those employees whose home location is that of the schedule being created, and *Non-Home Department* the opposite.
- Shift in View – If *Yes* will show only those employees already scheduled, and *No* will show those that are not scheduled in this department for the current period.
- Primary Sort – Select to choose primary sorting in employee view; secondary sorting is set





Printing Schedules

To create a PDF version of a schedule that can be printed or sent electronically, choose *Print* just above the schedule.

Print Copy Send Notifications



Select the desired print options and add notes to the individual days by clicking just next to the date number if required. Notes may also be added at the bottom of the page.

The schedule will display statutory holidays, shifts with allocations such as vacation, vacant shifts, and details entered in the shift *Description* field from the schedule.

Print Options

Month **Pay Period**

Weeks per Page: All **Two** One

Colour Settings
Amber

Page Settings
8.5 x 11"
9pt
Arial

Show Full Name
 Vertical Borders
 View Shift Notes

Schedule Views
 Show all
 Vacations
 Vacant Shifts

Set options prior to creating the PDF for printing.

Schedule Sign Off Sheet

Create PDF < September 3 - September 16 >

September 2017 - Employment Workshop

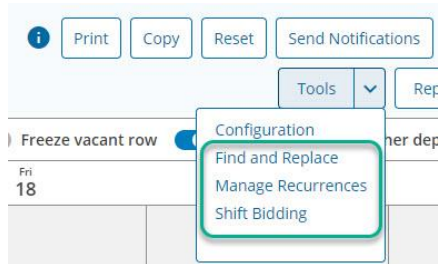
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
3	4 Labour Day 8:00a - 4:00p Jay P 10:00a - 6:00p George C Biring Bathing Suit 4:00p - 9:00p Della S	5 8:00a - 4:00p Jay P 8:00a - 4:00p Jordan M 8:00a - 4:00p George C 8:00a - 4:00p vacant 9:00a - 9:00p Ceeta B 4:00p - 9:00p Della S	6 8:00a - 4:00p Jordan M 8:00a - 4:00p vacant 9:00a - 9:00p Ceeta B 4:00p - 9:00p Della S	7 8:00a - 4:00p Jordan M 8:00a - 4:00p vacant 9:00a - 9:00p Ceeta B 4:00p - 9:00p Della S	8 S 8:00a - 4:00p vacant 8:00a - 4:00p Jordan M 9:00a - 9:00p Ceeta B 4:00p - 9:00p Della S	9
10 10:00a - 6:00p George C	11 8:00a - 4:00p vacant 4:00p - 9:00p Della S	12 8:00a - 4:00p Jordan M 8:00a - 4:00p vacant 9:00a - 9:00p Ceeta B 4:00p - 9:00p Della S	13 8:00a - 4:00p vacant 8:00a - 4:00p Jordan M 9:00a - 9:00p Ceeta B 4:00p - 9:00p Della S	14 Staff Meeting at 3 pm 8:00a - 4:00p Jordan M 8:00a - 4:00p vacant 9:00a - 9:00p Ceeta B 4:00p - 9:00p Della S	15 8:00a - 4:00p Jordan M 8:00a - 4:00p vacant 9:00a - 9:00p Ceeta B 4:00p - 9:00p Della S	16

Add a page note...



Advanced Scheduling Tools

There are three advanced tools for maintaining shifts en-masse and filling vacancies, accessed from the *Tools* menu.



Using Find and Replace

To find all the shifts assigned to an employee for a specific period of time so that they can be switched to another employee or vacant, select the Find and Replace tool under the Tools menu at the top right of the schedule.

Find the shifts to replace:

1. Choose the employee or rotation if and date range to review
2. Click Find. The shifts and recurrences will be presented within the two tabs.
3. Choose the replacement employee or set to Vacant.
4. Click Check to detect any conflicts with the replacement employee's existing schedule (not required for vacant).
5. Select the shifts or recurrences to change. (If the current schedule period is the only one of concern you can hide recurrences with shifts outside the period)
6. Change the effective date for the switch if desired.
7. Click Replace.



Find Shifts for:

Date: 2018-Apr-01 to 2018-Apr-14

Employee: Jackie Gee

Replace with:

Employee: Ceeta Barba

1 recurrence conflict(s), please select recurrence to update.

Recurrences for Jackie Gee to be replaced with Ceeta Barba

Recurrence Details (Sorted by earliest shift per recurrence)	
<input type="radio"/>	8:00 AM to 3:00 PM Weekly Every week, Mon No end date
<input checked="" type="radio"/>	8:00 AM to 5:45 PM Weekly Every 4 weeks, Tue Wed No end date

To be effective on: 2018-Apr-23

Replace Recurrence

Managing Recurrences

The recurrence manager can delete all or end recurrences on a specific date for an entire department, rotation or specific employee. Note that these steps cannot be undone.

1. Choose All, Employee or Rotation
2. For employee or rotation select the desired combination.
3. Select all or the specific set of recurring shifts to end or remove.
4. Specify the end date if using the End option.
5. Choose End Selected Recurrences, or Delete Selected Recurrences.

Manage Recurrences

All Employee Rotation

Department: Forest Terrace

Employee: Annie Duncan

Select All | Deselect All

9:00 AM to 3:00 PM
Weekly | Every week, Fri | No end date

Recurrence End Date: Thu, 24-Mar-2022

End Selected Recurrences OR Delete Selected Recurrences



Shift Bidding

Shift Bidding allows managers to notify eligible staff of vacant shifts by department / program so they can pick up additional shifts based on their availability. Once bids are placed the manager is then notified and can assign the shift to appropriate staff member based on position, hours or seniority.

For full details see the support pages at [Online help for Shift Bidding](#)

Shift Bidding

Select Shifts for Bidding To open a new set of shifts for employees to view

Department: All Departments Start Date: 01-Mar-2022 End Date: 01-Jul-2022 Apply To view existing shifts or blocks of shifts that have been opened and bid on, select the department and date range combination.

Shifts with Bids (17) Shifts without Bids (21) Blocks with Bids (4) Blocks without Bids (3)

Status: All View and manage bids

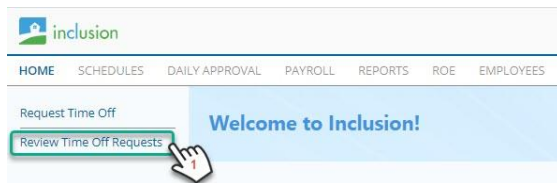
Status	Date	Time	Department	Allocations	Opened	Closes	Bids	
PENDING	08-Mar-2022 Tue	09:00 AM - 03:00 PM (6h 00m)	Day Program		Thu, 27-Jan-2022 09:34 AM	Mon, 07-Mar-2022 09:00 AM	1	View Bids Cancel Shift Bidding
PENDING	09-Mar-2022 Wed	09:00 AM - 03:00 PM (6h 00m)	Day Program		Thu, 27-Jan-2022 09:34 AM	Tue, 08-Mar-2022 09:00 AM	1	View Bids Cancel Shift Bidding
PENDING	10-Mar-2022 Thu	09:00 AM - 03:00 PM (6h 00m)	Day Program		Thu, 27-Jan-2022 09:34 AM	Wed, 09-Mar-2022 09:00 AM	1	View Bids Cancel Shift Bidding
PENDING	15-Mar-2022 Tue	09:00 AM - 03:00 PM (6h 00m)	Day Program		Wed, 26-Jan-2022 10:12 AM	Mon, 14-Mar-2022 10:00 AM	2	View Bids Cancel Shift Bidding
PENDING	16-Mar-2022 Wed	09:00 AM - 03:00 PM (6h 00m)	Day Program		Wed, 26-Jan-2022 10:12 AM	Tue, 15-Mar-2022 10:00 AM	1	View Bids Cancel Shift Bidding



Time Off Requests

Managers can review staff time off requests from the sidebar on the Home screen. For full details see the support pages at [Online help for Time Off Requests](#)

1. Choose Review Time Off Requests
2. Select View Details for the record to be reviewed
3. Choose a response and add a note to the employee as desired



Time Off Review

Show requests submitted from to

Status	Submitted	Employee	Start	End	Seniority Date	Reviewed By	
APPROVED	29-Apr-2020 10:02:46 PM	Costanza, George	Fri, 27-Mar-2020	Fri, 27-Mar-2020	15-Jan-2011	Maksimovich, Peregrin	View Details
DENIED	29-Apr-2020 10:02:46 PM	Costanza, George	Tue, 31-Mar-2020	Tue, 31-Mar-2020	15-Jan-2011	Maksimovich, Peregrin	View Details
PENDING	29-Apr-2020 11:18:22 PM	Buffay, Phoebe	Tue, 19-May-2020	Wed, 20-May-2020	03-Mar-2013		View Details

Time Off Review: Buffay, Phoebe | 01-Apr-2022 - 01-Apr-2022

PENDING

Department
Day Program

Start Date: Fri, 01-Apr-2022 | End Date: Fri, 01-Apr-2022

Duration: 6h 0m

Time Off Type: Vacation hours

Employee Notes: --

Requested Shifts
Day Program
Fri, 01-Apr-2022
09:00 AM - 03:00 PM (6h 00m)

Request Status
 Approved Pending Shift Cover Denied

Should a vacant replacement shift be created?
 Yes No

Reviewer Notes



DAILY APPROVAL – APPROVING EMPLOYEE TIME RECORDS

This tool allows you to approve what employees have entered on their electronic time sheets in the employee portal (Time Entry) or from the biometric clocks installed at your organization's locations. You can also make adjustments to employees' shifts for payroll purposes by setting the approved start and end time manually and adjusting pay codes if needed.

All records marked as approved indicate they are ready for payroll. The payroll group will then lock the records for processing at which time no further changes can be made, so it is important to establish a good workflow and approval schedule with them to avoid missed payments to your employees.

Layout of Daily Approval screen

The Daily Approval screen is accessed by selecting Daily Approval on the main menu.

The screenshot shows the 'Daily Approval' interface. On the left is a 'Summary and Filter pane' with a 'Summary of Hours' table. The main area is a table of shifts with callouts for 'Pay period for approval records', 'Buttons for approving, locking, and adding records or merging punch time records from biometric clocks', and 'Main table with shifts displayed based on choices in summary and/or filters'.

Summary of Hours

	Unapproved	Approved	Total
Total Hours	1,466.50	32.00	1,498.50
Employment	618.00	32.00	650.00
Employment Workshop	298.00	0.00	298.00
Forest Terrace	107.50	0.00	107.50
George Costanza	9.50	0.00	9.50
Jane Lavalie	84.00	0.00	84.00
Laura Van	14.00	0.00	14.00
Oak Ave	18.00	0.00	18.00
Respite	192.00	0.00	192.00
Supported Independen...	19.00	0.00	19.00
Westdale	214.00	0.00	214.00

Daily Approval (23 Jul - 05 Aug, 2017)

Buttons: Approved, Unapproved, Lock, Unlock, Delete, Add Entry, Reload, Merge

Status	Name	Department	Date	Start	End	Duration	Allocations	Notes
UNAPPROVED Needs Review	Ted Mosby	Supported Independ...	24 Jul - Mon	7:30 AM	6:00 PM	10.50 hrs		
UNAPPROVED Needs Review	Ted Mosby	Supported Independ...	25 Jul - Tue	7:30 AM	6:00 PM	10.50 hrs		
UNAPPROVED Needs Review	Ted Mosby	Supported Independ...	26 Jul - Wed	7:30 AM	6:00 PM	10.50 hrs		



Summary of Hours

Open and close the *Summary of Hours* by clicking the arrow on the divider. It displays a summary of Unapproved, Approved, and Total hours for the period so you can review your work for errors easily, and prior to payroll the Unapproved hours should be zero.

It doubles as a quick way to find shifts. To filter shifts, hover over any number (in blue) in the *Summary* and click on it. Clicking on a number will display the shifts associated with that number on the right hand side of the screen in the main shift table for quick approval.

For example selecting the 33.00 in the Summary of Hours in the figure below, will show only the unapproved shifts for the Employment Workshop location for Wednesday, the 26th, in the main shift approval table.

The screenshot shows the 'Summary of Hours' interface. At the top, there are tabs for 'Summary' and 'Filters'. Below the tabs, there are two dropdown menus: 'List by: Department' and 'then summarize by: Date'. A table below shows a summary of hours for various locations and dates. The table has columns for 'Unapproved', 'Approved', and 'Total' hours. A callout points to the 'Department' dropdown with the text 'Click the arrow to show the summary details.' Another callout points to the 'Date' dropdown with the text 'The Summary of Hours will follow the primary and secondary selection set here.' A third callout points to the '33.00' value in the 'Unapproved' column for '26 Jul - Wed' with the text 'By clicking on the numbers in the summary, the shift records will update in the main table to those that contribute to the selection.' A fourth callout points to a left-pointing arrow at the bottom right with the text 'Click the arrow to close or open the summary and filter pane.'

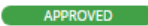
	Unapproved	Approved	Total
Total Hours	1,466.50	32.00	1,498.50
▶ Employment	618.00	32.00	650.00
▼ Employment Workshop	298.00	0.00	298.00
24 Jul - Mon	21.00	0.00	21.00
25 Jul - Tue	33.00	0.00	33.00
26 Jul - Wed	33.00	0.00	33.00
27 Jul - Thu	33.00	0.00	33.00
28 Jul - Fri	33.00	0.00	33.00
31 Jul - Mon	13.00	0.00	13.00
01 Aug - Tue	33.00	0.00	33.00
02 Aug - Wed	33.00	0.00	33.00
03 Aug - Thu	33.00	0.00	33.00
04 Aug - Fri	33.00	0.00	33.00
▶ Forest Terrace	107.50	0.00	107.50
▶ Oak Ave	18.00	0.00	18.00
▶ Respite	192.00	0.00	192.00
▶ Supported Independen...	19.00	0.00	19.00
▶ Westdale	214.00	0.00	214.00



Approval of Shift Records


To approve shifts select each one or choose the top check box to choose all, then select *Approved*. Note those in the example have a status **Matches Schedule** indicating that no edits or review should be required.

Status	Name	Department	Date
UNAPPROVED Matches Schedule	Judy Laval	Forest Terrace	09 Aug - Wed
UNAPPROVED Matches Schedule	Judy Laval	Forest Terrace	13 Aug - Sun

Once marked approved, the status icon will change to 

Locking Approval Records

Shifts that are approved can then be locked to prevent further manual adjustments and mark them for transfer to payroll. Select a shift record or choose the top check box to choose all and select *Lock*.

Once marked locked, the status icon will have a locked symbol 

Effects of Time Approval on Schedules

Once a shift has been marked as approved in Daily Approval, it can no longer be edited in Scheduling and the shift(s) fill colour will have a lock symbol.



Shift Records Requiring Review

Shifts requiring attention will have a *Needs Review* label in the status column indicating one of the following conditions:

- The time entered by the employee or from the biometric readers (actual time) did not match the schedule.
- The employee did not complete Time Entry (actual time is blank) or there are missing punches from the biometric readers.
- The shift was not originally scheduled (scheduled time is blank), but the employee did work

Status	Name	Department	Date	Start	End
UNAPPROVED Needs Review	Jane Lavalle	Forest Terrace	20 Aug - Sun	10:15 PM 10:15 PM 10:15 PM	8:45 AM 9:30 AM 9:30 AM
UNAPPROVED Needs Review	Jane Lavalle	Forest Terrace	22 Aug - Tue	10:15 PM 10:15 PM	8:45 AM 8:45 AM
UNAPPROVED Needs Review	Jane Lavalle	Forest Terrace	24 Aug - Thu	9:00 AM 9:00 AM	4:00 PM 4:00 PM

Making Adjustments

To make adjustments for errors in the actual time start/end recorded for an employee, missed shifts, or one time additions or deletions of shifts proceed as follows:

- To change the number of hours an employee will be paid, choose *Edit* for the shift, and edit the *Approved Start* and *Approved End* time. You do not need to adjust the schedule hours.

1 Edit

2 10:15 PM 8:45 AM

3 Cancel Save

- To pay an employee that was not on the schedule and did not enter their time in Time Entry, choose *Add Entry*, select the employee and set the *Approved Start* and *Approved End* time.

Approved Unapproved Lock Unlock Delete Add Entry Reload Me

- To remove a record so that it does not flow through to Payroll, click the check box for the record then select *Delete*.

Approved Unapproved Lock Unlock Delete Add Entry Reload Me



Note that if you accidentally delete a shift, you can use the *Status* option in the filter section to unhide and display them.

Viewing and Editing Pay Code Information

Paycodes indicate how a shift will be paid, and by default are calculated based on the rules for your organization or will have the allocation that was manually chosen in scheduling.

Click the arrow to show the shift paycode and note details section.

UNAPPROVED Needs Review Jane Lavalley

Allocations
NSPEC (7.75)
Reg (2.75)

Paycode	Hours	Start	End
Night Special	7.75	10:15 PM	6:00 AM
Regular	2.75	6:00 AM	8:45 AM

Paycodes indicate how the hours for the shift will be paid/allocated.

To edit the allocation or change the number of hours for a given paycode, click the *Edit* button for the shift and then *Add* for a new or *Edit* for an existing paycode. The type of allocation, *Fixed* or *Flex*, can be chosen where *Flex* will assign hours to a paycode but it can still be affected and changed by payrules and *Fixed* will force the hours to be paid as selected.

UNAPPROVED Needs Review Jane Lavalley Forest Terrac 13 Aug - Mon 10:15 PM - 08:45 AM 10:50 hrs NSPEC (7.75) REG (2.75)

Cancel Save

Paycodes Notes Mileage and Expenses

+ Add

Paycode	Type	Hours	Override	Start Time	End Time	Balance (hrs)
Night Special		7.75		10:15 PM	06:00 AM	-
Regular	Fixed	2.75		6:00 AM	8:45 AM	-

Edit Edit to adjust

Delete Cancel Save

Paycode selection and number of hours



Viewing and Editing Notes

Employees can leave a note to the approver in Time Entry which will be displayed on the main shift row and the detail tab. The daily approval note will display what was entered on the original schedule or may be added and edited here to provide detail about the shift.

Click the *Edit* button on the shift to make changes to the daily approval note. Employee notes may not be edited.

Type	Contents
Daily Approval Note	Medical support shift
Employee Note	Dave needed medical atte

Mileage and Expense Entries

Employees can add mileage and expense entries in Time Entry, and entries can be edited or added by the approver, using *Edit* and *Add Entry* on the Mileage and Expense tab. More than one entry can be added to a shift if needed.

Expenses (\$) 12.50

Odometer: Start -- Finish -- Distance (km) 22.6

Notes Took Dave to Dr. Adjustment Reason Added entry



Punch Clock Records

Records from a biometric punch clock will automatically be matched to a shift if one exists as shown in the first record of the example below for employee Laura Van.

To merge two punches that didn't have a scheduled shift or were beyond the normal matching criteria for a shift, choose the records to combine and then click *Merge*.

The screenshot shows a web interface for managing punch clock records. At the top, there are buttons for 'Approved', 'Unapproved', 'Lock', 'Unlock', 'Delete', 'Add Entry', 'Reload', and 'Merge'. Below these is a table with columns: Status, Name, Department, Date, Start, and End. Three records are listed, each with an 'Edit' button. A 'Merge' button is highlighted with a hand icon and the number '3'. Below the table, a 'Merge Result' box shows the combined record for Judy Laval on 08 Aug - Tue, with start and end times of 10:22 PM and 8:56 AM. Hand icons with numbers '1' and '2' point to the 'Edit' buttons of the two records being merged.

Status	Name	Department	Date	Start	End
UNAPPROVED Matches Schedule	Laura Van	Forest Terrace	08 Aug - Tue	5:00 PM 4:53 PM ✓ 5:00 PM	8:00 PM 8:12 PM 8:12 PM
UNAPPROVED Needs Review	Judy Laval	Forest Terrace	08 Aug - Tue	10:22 PM ✓ 10:22 PM	
UNAPPROVED Needs Review	Judy Laval	Forest Terrace	09 Aug - Wed	8:56 AM ✓ 8:56 AM	

Merge Result: Judy Laval, Forest Terrace, 08 Aug - Tue, 10:22 PM - 8:56 AM

When setting the approved start and end time you can use time options button to choose from the list to quick change which time record to use if needed.

The screenshot shows a time selection interface. It includes a date selector for '09 Aug - Thu' and a time range selector showing '04:00 PM - 08:00 PM'. A dropdown menu is open, showing options: 'Use Actuals in Approved Time', 'Use Scheduled in Approved Time', 'Use Schedule In and Actual Out', and 'Use Actual In and Schedule Out'. Hand icons with numbers '1' and '2' point to the dropdown menu and the 'Use Actuals in Approved Time' option, respectively.



Using Daily Approval Filters

By changing the filters in Daily Approval, you can set the focus on which shifts are displayed, making finding and editing shifts quicker and easier.

Steps to Filter

1. Click *Filters* on the left panel
2. Click on the title of the filter you want to set, for example Employee.
3. Click the items you want to include.

The shift records on the right will automatically update based on the filters chosen.

Clicking *Clear All* will remove the filters and return to the default view of Unapproved items for the entire pay period.

Types of Filters

- **Employee** - Use to show only selected employees.
- **Department** - Use to show only select departments.
- **Paycode** – use to show only certain hours, for example overtime.
- **Match Status** – options include:
 - Matches Schedule, Needs Review, Manual Entry
- **Status** – options include:
 - Approved, Unapproved, or Deleted
- **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.
- **Lock Status** – options include:
 - Locked, Unlocked (no filter will show both)

Summary **Filters** Clear All

Filters

Employee

Available (2) Applied (2)

Available

- Della Stewart
- Elaine Benes
- Frank Costanza
- George Costanza
- JJamieson
- Jackie Gea
- Jackie Oh
- Jay Peterman
- Jimmy Deano
- lineting Ma

Applied (2)

- Desi Rae
- Joan Lakes

Desi Rae, Joan Lakes

Department
no filter

PayCode
no filter

Match Status
no filter

Status
Unapproved

Date Range
06 Aug, 2017 - 19 Aug, 2017

Lock Status
no filter



Notes