APPROVAL PROCESS

Before a time card is signed off
- Resolve critical & warning exceptions &
- Handle pending and unapproved requests

A. Handle Exception Messages

1. **Employee section>TCS button**
2. View employee's **Exceptions** card
3. Make corrections using the *Transaction List* and the actions in the left pane
4. Select the message to handle
5. Click **Handle Selected** button when done

Critical – Must be corrected for the employee to be paid

Warning – Either correct or handle these; employee may still be paid if incorrect

Information

B. Handle Calendar Requests

1. **Actions** > **Approval** card > **Transaction Requests** > Select a request type
2. Search for Requested or Needs Review
3. Open request; check tabs; Approve or Deny

C. Approve Time Card(s)

When all exceptions and requests are handled
1. Open the **Actions** Section
2. Select all or individual check boxes for time cards to approve
3. Select **Action card > Approve Time Card** on the left pane

Tips

- Edits within the <u>Transaction Grid</u> can be made directly by clicking the desired line
- This guide's examples use the <u>Transaction List</u>
- Click red arrows to expand cards and lists to see detail
- Click folder icons, calendar icons, etc. to see more detail
- A red * indicates required fields
- The Navigation Pane on the left side is dependent on the Section selected

Quick Guide Step-by-Step

Use these guides found in the **Help** section
- Vacation or Unavailability
- Time and Attendance topics
- Supervisor/Manager quick guides
- Change password
- Bookmarks

Forward Assignment to Other Supervisor

1. To transfer employee timecard approval rights to another supervisor: you can forward all employees to one supervisor or divide them among several supervisors
2. **Actions > Employee card > Auto Forward Assignment**
3. Click **Employee Forward**
4. Enter **Effective and Expiration dates**, and **Next**
5. Select the supervisor
6. Select the employees to forward
7. Click **Forward Selected**

API Healthcare Time and Attendance Quick Reference For Supervisors

Version 09.01

Open Time and Attendance Portal

1. Enter User Name and Password on the log in screen
2. Click the **Login** button

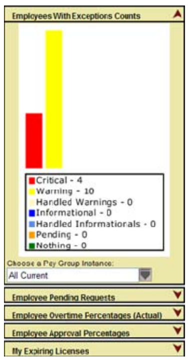
Find and Open Employee Record

A. Open the **Employee** section
B. Click **Search** in left pane if the search screen is not already open
C. On "Enter your Employee search criteria" screen, either enter a single name to find one person, or leave the fields empty to get a list of employees assigned to you
D. *Wild card symbols may be used to replace single (#) or multiple (%) letters
E. Click **Search**. Results appear below
F. Use **Advanced** search button on left pane to search other field information
G. Select a tab, select field criteria, and then click **Search**

Employee LaborViews

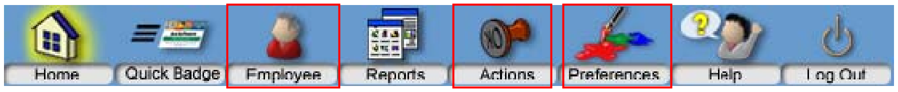
1. On right side of **Home** page
2. Click red arrows to show detail of the desired LaborView,
3. Monitor Daily: *Employees with Exceptions Counts, Pending Requests, Pay Period Overview*

   Click colored bars to view exception detail in the Employee Section



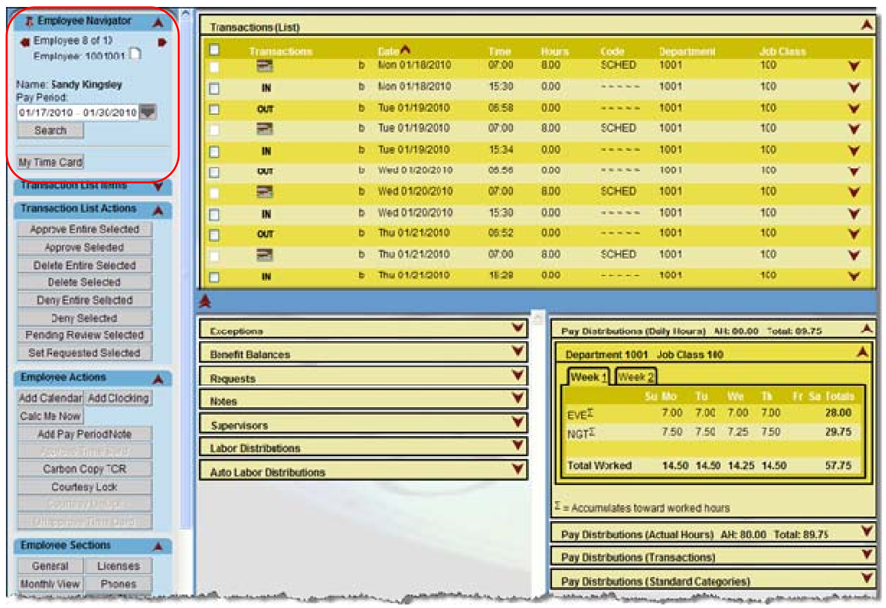
Employee > Left Pane

Overview of Sections



Employee: To manage transactions, view benefits and pay distribution
Reports: To run reports
Actions: Lists action cards for functions and processing options
Preferences: To change displays and notifications

Employee: *Time Card Screen* (Default screen when opening an employee)
Select TCS button on left pane under Employee Sections
Search for employees in the Employee Navigator at the top of the left pane



Actions: Cards for Approval, Employee, General, Processes, Scheduling, and System actions.
Printing the Time Card Report:
Employee tab > Select an employee; **Employee** Section > **Time Card Report –** Scroll over report or from the left pane select **Print** or Email

Display the Time Card Screen
Add – select either **Add Clocking** or **Add Calendar** in left pane; enter appropriate information

Transaction List Actions

Delete a Clocking or Calendar
1. Click check box next to record
2. Select **Delete Selected** under the Transaction List Actions

Edit a clocking
1. Click check box next to clocking record
2. Expand details and modify the record

Edit Calendar
1. Click check box next to calendar record
2. Expand details and modify the record

Add Transaction Note
When editing a clocking or calendar select the Notes tab;
Either select Predefined Note Code or enter text in the Text box; Save

Enter Adjustments to Pay Info

1. Open the employee **TCS** in Transaction List view
2. Click **Add Adjustment** in the **Employee Actions** section in the left pane
3. Enter fields with red * and other applicable fields.
4. (*On the **Indicators** tab; verify or change the **TA Interface Standard** field on the TA Interface Processes card*).