Timeclock Approval of Manual Punches: Supervisor Guide

Starting with punches entered on the pay period 10 timecard (10/18/15), employees will be asked to approve any manual edits to their timecards at the timeclock. This process will largely replace the Time Change Request (TCR) forms. This is your guide to the new process, as well as the new features of Timekeeping that have been built to accommodate this new functionality.

New Process Overview
Please note the supervisor/timekeeper duties are bolded.

1. Need for manual time edit is identified
2. Supervisor/timekeeper enters edit on timecard using Manage Employee Time
3. Two messages are created and flow to the timeclock at 3am:
   a. One generic message which will alert employee to an edit requiring response upon next clock in/out
   b. One detailed message accessed through the new Punch Approval icon which will describe the edit made and ask the employee for approval on the edit
4. Employee responds to messages at the timeclock
5. Supervisor approves timecard
6. Supervisor verifies responses through reporting and/or audit trails and follows up to resolve any rejections or pending approvals over a week old
7. Student Life Payroll monitors responses and follows up with supervisors/employees as needed
8. Prior Period Adjustments (anything that cannot be entered via Manage Employee Time prior to access being disabled) will still need TCR form validation. Please continue with the existing process if unable to enter edits on the timecard using Manage Employee Time.

Actions to be Approved at the Timeclocks
The table below details what actions on a timecard will require employee approval at the timeclock, as well as the message they will see for that particular action. Please use caution when working with employee timecards, as entry errors that are immediately corrected will require multiple employee approvals. For example, if a timekeeper fills in a missing punch for 4am but realizes immediately that it was 4pm and fixes it, the employee will see 2 messages: one for the original add of 4am, and one for the edit to 4pm. With the old process using TCR forms, the employee would not have had visibility to the initial entry 4am error as long as it ended up being correct at the time of pay period closing. Additionally, please note that employees will be able to see the comments saved on the punches on their approval screen.

<table>
<thead>
<tr>
<th>Action/Edit Type</th>
<th>Punch</th>
<th>Block of Regular Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added</td>
<td>“A punch on (date/time) was ADDED on your (job label) timecard by (username). Supervisor Comments: (comment). Do you approve this edit to your timecard?”</td>
<td>“A block of (# hours) beginning (date/time) was ADDED on your (job label) timecard by (username). Supervisor Comments: (comment). Do you approve this edit to your timecard?”</td>
</tr>
<tr>
<td>Deleted</td>
<td>“A punch on (date/time) was DELETED on your (job label) timecard by (username). Supervisor Comments: (comment). Do you approve this edit to your timecard?”</td>
<td>“A block of (# hours) beginning (date/time) was DELETED on your (job label) timecard by (username). Supervisor Comments: (comment). Do you approve this edit to your timecard?”</td>
</tr>
<tr>
<td>Edited</td>
<td>“A punch on (old date/time) was edited to (new date/time) on your (job label) timecard by (username). Supervisor Comments: (comment). Do you approve this edit to your timecard?”</td>
<td>“A block of (old # hours) beginning (old date/time) was edited to (new # hours) beginning (new date/time) on your timecard by (username). Supervisor Comments: (comment). Do you approve this edit to your timecard?”</td>
</tr>
</tbody>
</table>
Manual Punch Audit Trail
The Manual Punch Audit Trail has been added to employee timecards as a way to track manual punch statuses.

1. To access this feature, click on “Manual Punch Audit Trail” under “Other Options”.

2. You will now see a list of all manual punches for the pay period of the timecard.

   a. **Punch transaction data** – these columns identify key pieces of data regarding the manual punch.
      i. **Action** – will be either Add, Delete, or Edit.
      ii. **Punch Txn Date** – date of punch, original punch date for edits
      iii. **Punch Txn Time** – time of punch, original punch time for edits
      iv. **Original Txn Hrs** – amount of regular hours block
v. Edited Punch Date – new date of punch for edits
vi. Edited Punch Time – new time of punch for edits
vii. Updated Txn Hours – new amount of regular hours for edits
viii. Updated By – user ID of user entering manual punch

b. **Message response data** – these columns identify the status of the message to the employee requiring approval.
   i. **Message Status** – this will be one of five statuses:
      1. *Reply Pending* – punch is awaiting employee response
         a. Supervisors should monitor pending responses and follow up with employees who have not responded within a week.
      2. *Accepted* – punch has been accepted by the employee
      3. *Rejected* – punch has been rejected by the employee
         a. Rejected punches should be reviewed carefully and the reason/resolution must be documented. Student Life Payroll will be reviewing rejected punches carefully. See Items to Monitor on page 5 for more info on what documentation will be needed.
      4. *Added by Employee* – punch has been added by employee via web clock or manually, will not flow to timeclock for approval
      5. *Approved by Employee* – punch is on a timecard which has been approved by the employee on the timecard.
         a. A process will run the Wednesday morning after an approval deadline to flip these statuses to “Approved by Employee” and will remove any which were Reply Pending from the timeclock.
   ii. **Message Date** – this will reflect the date the message to the employee was created
   iii. **Response Date** – this will reflect the date the employee responded to the message
   iv. **Response By Name** – should always be the employee
   v. **Response Location** – the clock at which the employee responded to the message.
      1. The messages will be sent to all timeclocks at which employees have active jobs

**Manual Punches Response Reports**
Running these reports will pull the data above, but for entire employee populations. Timekeepers are strongly encouraged to run these reports periodically to monitor pending approvals and rejections.

1. To access these reports, click on Reports from the Main Menu of Timekeeping.
2. Click on the report for your desired format.
3. Click on “Select Parameters to Run Report”.

4. The parameters are the same for both reports. Some items of note:
   a. The **Punch Date Pay Period** and **Punch Date Fiscal Year** will pull all punches entered on the chosen pay period’s timecard(s). A report run with these dates can be used to ensure all punches from a pay period have responses, or can be used to monitor rejected punches from a single pay period.
   b. The **Manual Punch Edit From Date** and **Manual Punch Edit To Date** will pull all manual punches entered between the two dates entered. These dates must be at least one day apart. A report run with these dates can be used to monitor manual punch entries as you go, and will be particularly useful when the Prior Period Adjustments are programmed into timeclock approvals at a later date.
   c. The **Edited By (User ID)** field can be used by supervisors sharing a group of employees to pull only the punches they have entered.
   d. The **Message Response** field can be used to pull a report of particular responses. The options available are:
      i. ALL
      ii. Accepted
      iii. Rejected (HIGHLY RECOMMENDED)
      iv. Reply Pending (HIGHLY RECOMMENDED)
      v. Added by Employee
      vi. Approved by Employee

5. Click “Run Report” once you have selected your desired criteria.
6. Click on the Export Format matching the selected report. This would be PDF for the example shown.

7. Please see an example of the PDF report below. Note that each manual punch is a 2-line entry. The first line of the entry is indented slightly.

8. See below for the data you can obtain using the Excel version of the report. The data covers three basic categories:
   a. **Timecard Identifying Information**
   b. **Punch Identifying Information**
   c. **Approval Status Information**

   **Items to Monitor**
   Supervisors will need to monitor the manual punches for their staff members. The areas on which to focus are detailed below. **Timecards can be approved with pending and/or rejected punches to ensure timely pay for employees, but the follow-up and documentation will need to follow within a week of approval.**

   1. **Reply Pending** – Supervisors should monitor the Manual Punches Response Report by Reply Pending until all punches have been responded to. We recommend giving employees a week to respond and following up until they respond. Student Life Payroll will follow up on any pending punches to ensure compliance, but this monitoring should be performed by the supervisor regularly.
      a. If an employee leaves prior to a response at the timeclock or is otherwise unable to respond at the timeclock, alternate documentation of the employee’s approval of the punch such as an email or TCR form should be collected and forwarded to Student Life Payroll.
2. **Rejected** – Student Life will need to account for all rejected punches for audit purposes. The Payroll Team will compile the reasons/documentation for all rejections, so please forward anything collected from your staff to sl-timechanges@osu.edu as soon as you can. Possible scenarios may include:

a. **Accidental Rejections** – if an employee accidentally hits “No” instead of “Yes”, they should email the supervisor an explanation of what happened and their intended response with the date/time of the punch they meant to approve. If an email is impractical, a TCR form can also be used to document accidental rejections. This email/form should be forwarded to sl-timechanges@osu.edu.

b. **Corrected Rejections** – if an employee rejects a punch, the punch is then corrected, and the correction edit is approved, the approved edit will suffice as documentation for the rejection. No further documentation is needed, providing this edit is entered before the approval deadline for that pay period.
   
i. If the edit is after the payroll deadline for that pay period, a Prior Period Adjustment Form will need to be submitted with the accompanying TCR form.

c. **Rejections Which Are Correct** – if an employee disagrees with a punch but it is found to be true and accurate, please consult with Student Life Payroll on how to proceed. Documentation will be necessary to explain why the timekeeping was appropriate despite the employee non-approval.