TRS New User Training

TRS Functionality Part II

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Payroll Services
TRS Administrator

timerep@gwu.edu or 571-553-4407
To complete Training:

MUST COMPLETE:

• TRS Compliance & Policy Part I
• TRS Functionality Part II
• TRS Quiz – passing grade is 80 or above
• TRS Access Request form submitted to timerep@gwu.edu
Note:

This training will cover edit & approval access

Your access level will reflect what is requested on your TRS Access Form
Additional Resources for Training

- Employee Handbook: [https://hr.gwu.edu/compensation](https://hr.gwu.edu/compensation)
- Benefits Time Off System - [https://hr.gwu.edu/paid-time](https://hr.gwu.edu/paid-time)
- Payroll Website: [https://hr.gwu.edu/payroll](https://hr.gwu.edu/payroll)
- Payroll Tip Sheets - [https://hr.gwu.edu/trs-instructions](https://hr.gwu.edu/trs-instructions)
  - All instructions on this training have corresponding tips sheets located on the Payroll TRS Instructions page. You will also find the power point sides for this training.
- Payroll Services YouTube Channel - [https://www.youtube.com/channel/UCpCj73kWAKtkSKCF91xYe-Q](https://www.youtube.com/channel/UCpCj73kWAKtkSKCF91xYe-Q)
  - Employee Training Videos including the TRS Training videos
  - Additional Timekeeper Training Videos
TRS New User Training

• Logging into UKG

• UKG Timekeeping Function and Settings
Accessing the UKG Time Reporting System (TRS)

There are two ways to access the TRS system to review time and time off

• Mobile App
• UKG Browser
Logging into UKG Browser

- Managers & Timekeepers can use the UKG browser or Mobile App to process employees' time
  - Browser Link: http://go.gwu.edu/TRS
  - Mobile Instructions: https://hr.gwu.edu/mobile-app

- UKG is setup for Single Sign-On
  - If you are not already signed into the Single Sign-On, you will be prompted for your GW email address and password.
System Time Out

• Employees are able to access the Time Reporting System (TRS) with single sign on. However, access will “time out” after 5 minutes of inactivity and a message will pop up that says “You are not permitted to perform the Requested action.

• To re-access the TRS, you will need to refresh/reload your page to sign back into the TRS.
Accessing UKG Workforce Central Mobile App

- The UKG Workforce Central mobile app, available in the Apple and Android app stores, delivers instant access to relevant employee information and tools via a simple and intuitive design. Allowing you to access the application from work, in the field, and on the go.

- Access Mobile agreement on the Payroll Services website. Sign off on agreement to obtain the server name and download the mobile app.
  - Mobile Agreement: https://hr.gwu.edu/ukg-workforce-mobile-user-agreement-and-authorization

- Mobile App Guides: Can be found at https://hr.gwu.edu/mobile-app
UKG Navigator & Workspace
Manager Navigator

When logging into UKG you will be brought to the Manager Navigator. A UKG Navigator is customized to reflect the items needed for your job role. It includes specific widgets, Genies, and alerts.

Your Workspace Displays one or more widgets and the Related Items Pane

Your default Genie will be Hours Summary. The pieces of the Workspace are as follows
Manager Navigator

Active Bar
Displays active workspaces, click title to bring a workspace into focus. (Manage My Department is your primary workspace)

Workspace
Displays one or more widgets and the Related Items pane.

Alerts
Links, which appear as icons enabling you to quickly view exceptions, time off, and delegation alerts.

Name/Sign Out
Identifies user and a link to log out of navigator

Additional Genies
Access additional Genies by selecting the arrow next to the Hours Summary default Genie. This will bring up a list of additional Genies.

Workspace Context
Some workspaces allow you to choose a context - a Time Period and set of Employees to use in all widgets where they apply. If needed, change the selections and click the Synchronize icon.

Related Items Pane
Includes one or more additional widgets for less common tasks; the Related Items pane contains different widgets for each workspace.

Repositioning Widgets
Move a secondary widget into a primary position by clicking the title bar, dragging it over a primary widget, and releasing.
Workspace Toolbar

**Select All Rows** lets you select all employees in a Genie.

**Column Selection** lets you remove columns you do not want to see.

**Filter** lets you search on selected Genie rows.

**People** shows employee info such as: accrual info, primary job info, meal break setting.

**Timekeeping** is used to add or remove a punch that replicates TRS.

**Approval** button is used to approve from the Genie.

**Schedule** can be used for bi-weekly Exempt employees.

**GoTo** allows access to other widgets that are available for the same selection of employees. (You do not have to select the employees and time period each time you change widgets).

**Refresh** will refresh the data on the Genie.

**Share** gives options to print Genie or export Genie in Excel or CVS output.
Your workspace allows you to choose additional Genies and has two content boxes.

- One for **time period**
- One for **Hyperfinds**

Genies is a central part of UKG. There are several types of Genies. Each one can give you a different component of data on each. Genies available on your list and a quick description are as follows.
## Workspace Content

<table>
<thead>
<tr>
<th>Genies</th>
<th>Time Periods</th>
<th>HyperFinds</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Hours Summary - (default)</td>
<td>• Pervious Pay Period (default)</td>
<td>• All Home - Bi-Weekly: Shows only bi-weekly paid employees (default)</td>
</tr>
<tr>
<td>• QuickFind – Search for employees</td>
<td>• Current Pay Period</td>
<td>• All Home - Monthly: Shows only monthly paid employees (choose from drop down)</td>
</tr>
<tr>
<td>• Manager Approval – displays manager approval</td>
<td>• Next Pay Period</td>
<td>• All Home and Transferred in Employees: Shows bi-weekly and monthly employees (choose from drop down)</td>
</tr>
<tr>
<td>• Reconcile Timecard for Payroll – Used if you have work schedules</td>
<td>• Current Schedule Period (displays week format - employees are clocking in and out for)</td>
<td>• All Home - Termed: Shows anyone terminated in the TRS (choose from drop down)</td>
</tr>
<tr>
<td>• Accrual Reporting Period – Shows time off balances</td>
<td>• Previous Scheduled Period (displays week format - last scheduled week employees were clocking in and out for)</td>
<td></td>
</tr>
<tr>
<td>• SignOff Issues – Quick view of exceptions and unapproved timecards</td>
<td>• Next Scheduled Period (displays week format - next scheduled)</td>
<td></td>
</tr>
<tr>
<td>• Reconcile Timecard – Genie for departments that use work schedules</td>
<td>• Week to Date</td>
<td></td>
</tr>
<tr>
<td>• Employee Hours by Week – Shows overtime column</td>
<td>• Last Week</td>
<td></td>
</tr>
<tr>
<td>• Pay Period Close – Like Hours Summary has field showing if timecard is signed-off</td>
<td>• Yesterday</td>
<td></td>
</tr>
<tr>
<td>• IS Summary – Shows employee username, email address info</td>
<td>• Today</td>
<td></td>
</tr>
<tr>
<td>• Previous Pay Period (default)</td>
<td>• Yesterday plus 6 days</td>
<td></td>
</tr>
<tr>
<td>• All Home - Bi-Weekly: Shows only bi-weekly paid employees (default)</td>
<td>• Last 30 days</td>
<td></td>
</tr>
<tr>
<td>• All Home - Monthly: Shows only monthly paid employees (choose from drop down)</td>
<td></td>
<td></td>
</tr>
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<td></td>
</tr>
</tbody>
</table>

Click refresh on tab to refresh workspace settings
UKG Terms

- **BW** – Abbreviation for bi-weekly paid employee
- **MO** – Abbreviation for monthly paid employee
- **Pay Rule** – Represents the pay class of an employee such as union, temp, exempt, regular nonexempt.....
- **Secondary Job** – BW employees with more than one position have one labeled as primary and all others are labeled as secondary
- **Transfer** – All secondary jobs have to transfer their time to their secondary positions when clocking so secondary timekeepers can see them on their Genies
- **Accrual Profile** – Used to calculate employees Time Off
- **Approve Timecard** – Approvals are made by the department’s designated Timekeeper with approval access. Once the time card is approved in the application Payroll Services knows the time is ready to be processed and picks that time up in the time file to be processed
- **Sign-Off** – sign-offs are made by the TRS Administrator. The system will sign off and freeze all timecards that have an approval with no missed punches. Signed off time will be included in the time file for processing.
Reviewing Nonexempt Time Card
Accessing Time card

- Select employee and double click to access timecard
- To select multiple employees:
  - select employees
  - select GoTo
  - select Timecards
- The timecard will open up in an additional Tab
Top Timecard Toolbar

- **Approve Timecard**: Allows you to approve or remove a timecard approval.
- **Quick Actions**: Allows you to mark and fix Exceptions.
- **View**: Allows you to only see Exceptions.
- **Calculate Totals**: Allows you to check total impacted by your edits before saving the data. Complete the edits within the timecard and click Calculate Totals. Select Refresh to roll back or Save to move forward.
- **Print Timecard**: Allows you to print time.
- **Save**: To apply changes. Will appear orange when there are changes to be saved.
- **Update**: Allows access to other widgets available.
- **GoTo**: Allows access to other widgets available.
- **Refresh**: Allows you to refresh Timecard.
- **View**: Only see Exceptions.

*Calendar button allows date range entry. (You can search back 10 years on employees records)*
Assigned Managers
Assigned Managers for Regular Employees

- Assigned Managers are used for Time Off approval in TRS
- Assigned Managers are pulled from Banner
- If the Assigned Manager is wrong contact your HR Business Partner
- To correct an Assigned Manager the HR Business Partner will work with Compensation to update the info in Banner. Once updated it will update in TRS the next day.

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Hours Summary

<table>
<thead>
<tr>
<th>GWId</th>
<th>Name</th>
<th>Pay Rule</th>
<th>ECLS</th>
<th>Banner Org Num</th>
<th>Department Name</th>
<th>Manager Approval</th>
<th>Missed Punch</th>
<th>Annual Hours</th>
<th>Sick Hours</th>
<th>Holiday Hours</th>
<th>Other Paid Leave Hours</th>
<th>Worked Hours</th>
<th>Total Paid Hours</th>
<th>Unpaid Hours</th>
<th>Assigned Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>GW1103</td>
<td>Cleveland, Grover</td>
<td>TP11 30MIN...</td>
<td>9999999</td>
<td>TEST DEPARTMENT</td>
<td>8.0</td>
<td>8.0</td>
<td>Washington, George</td>
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<tr>
<td>GW1107</td>
<td>Eleanor Roosevelt</td>
<td>NE17 30MIN...</td>
<td>9999999</td>
<td>TEST DEPARTMENT</td>
<td>8.0</td>
<td>8.0</td>
<td>Washington, George</td>
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<tr>
<td>7777777</td>
<td>EMAIL NOTIFICATION USER</td>
<td>TP11</td>
<td>9999999</td>
<td>TEST DEPARTMENT</td>
<td>8.0</td>
<td>8.0</td>
<td>Washington, George</td>
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<tr>
<td>G999999009</td>
<td>ESOC, ESOC</td>
<td>TP11</td>
<td>9999999</td>
<td>TEST DEPARTMENT</td>
<td>8.0</td>
<td>8.0</td>
<td>Washington, George</td>
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</tr>
<tr>
<td>GW1104</td>
<td>Lincoln, Abraham</td>
<td>NE11 30MIN...</td>
<td>9999999</td>
<td>TEST DEPARTMENT</td>
<td>8.0</td>
<td>8.0</td>
<td>Washington, George</td>
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</tr>
<tr>
<td>GW1108</td>
<td>Roosevelt, Franklin</td>
<td>TP11 45MIN...</td>
<td>9999999</td>
<td>TEST DEPARTMENT</td>
<td>8.0</td>
<td>8.0</td>
<td>Washington, George</td>
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</tr>
</tbody>
</table>
Assigned Managers for Students

- Assigned Managers are used for Time Off approval in TRS
- Assigned Managers are pulled from Banner
- If the Assigned Manager is wrong contact Student Employment to assist in the change
  - **Note:** Employees with multiple positions can only have 1 assigned manager. It will be the primary position.
Bottom Timecard Toolbar

Tabs available at the bottom of the timecard are as follows from left to right:

- **Totals tab** allows you to check the total amount being charged for each labor charge account.
- **Accruals tab** allows you to check accrual balances for the employees. Uses the date you have selected.
- **Audits tab** allows you to review all edits made to an employee’s time card before sign-off.
- **Historical Corrections** allows you to review all edits made to an employee’s time card after sign-off.

![Diagram of timecard toolbar with annotations]

Check Totals

Check time off accruals

Check Audits made to time card

Check Historical Time Off entries
Right click on the employees name on the Genie to display an info box and action buttons.

The info box gives you options to:
- Add a punch
- Add a Pay Code
- Approve the Timecard
Timecard Employee Info Box

- Right click on the employees name on the **timecard** to display an info box.
- The info box will display information such as Pay Rule, Accrual Profile, Employment terms and Primary account.

Right click on the name in the time card to display an information box. The box gives you info such as:

*Pay Rule, Accrual Profile, Employment Terms, Primary Account, Manager ...*
Secondary Positions
Bi-Weekly Employees with Secondary Jobs

- Employees with more than one position should **clock in** for the secondary position by phone with a clock code ‘2’ and transfer code to the secondary job.
- Timekeepers & Managers will not be able to see the employees who have secondary positions with them until they clock in transferring time to their position.
- If timekeepers see time that is not for their department **NEVER DELETE HOURS**.
- Contact **timerep@gwu.edu** alerting the UKG admin of hours that do not belong to your position.

![Timecard screenshot](image-url)
Bi-Weekly Employees with Secondary Jobs

- Once the employee clocks in they will display on the Timekeepers Genie.
- In the Transfer column you will see the transfer code.
- If the timekeeper still does not see the employee you may need additional access, contact timerep@gwu.edu.
- Additional access can be requested by the Finance Director by emailing timerep@gwu.edu.
Adding Transfer Code

- Transfer codes can be added by using search from the Transfer column in the timecard.
- Right click on a cell to activate the search transfer box.
Adding Transfer Code

- Transfer codes can be added by using search from the Transfer column in the timecard.
- Fill in Department number and Position number.
- Select Apply to add changes to the time card.
Copy and Paste Transfer Code

- Transfer codes can be added by using the keyboard keys
- Right click to select a cell and highlight the transfer number
- Select Ctrl + C to COPY in a field that has time for your department
- Select the tab key to activate changes

![Image of spreadsheet with highlighted cell and instructions for copying transfer codes]
Copy and Paste Transfer Codes

- Select the cell you want to paste the transfer code to
- Select **Ctrl + V** to **PASTE** the transfer code in the field that has time for your department
- Select the tab key to active changes
- **Save** your changes
- Only add transfers for your department

Right click and select **Ctrl** key + **V** key at the same time to paste transfer code in field with time for your department

Save Changes
• Hovering over the Transfer code will display a pop up box with a description of the org number

• Hovering over the labor level string in the Totals section will also display the same box to assist the timekeeper in determining if the time is charging to the correct account
BW Secondary Jobs & Totals Tab

- The 3rd number in the labor string displays the Department and the 5th place holder in the labor string displays the Position number.

![Timecards](image)

- Transfer code: `//016001/103002001/`  
  `////OFFICE OF THE PRESIDENT///UVS STAFF Asst Iv PT.`
Totals Tab

Select drop down arrow on Totals tab to get a different view of charges

- **All** – Shows All charges for bi-weekly period
- **Shift** - If employee has work schedules you can view charges by shift
- **Daily** – Click each day in timecard and the Totals area will show charges by day
- **Period to Date** – Shows charged to date
Monthly Employees with Secondary Jobs

- Monthly employees with secondary bi-weekly paid positions will normally have their monthly job setup as the primary position in Banner.
- The Timekeeper will be able to retrieve the timecard from the All Home-Monthly Genie.
Monthly Employees with Secondary Jobs

- Employee will need to clock in and out hours for secondary position through the phone
- The transfer code with the bi-weekly hours will appear on the timecard
- Time Off Hours will not be exported for bi-weekly payment
Meal Breaks
Confirming Meal Breaks

- Go to **Manager Approval Genie** to check meal break settings
- If changes are made to the employees Banner record the meal break will set back to the default setting
- Default Pay Rule (meal break) settings with descriptions can be found on the Payroll Website under Time Reporting/TRS Instructions
  - [https://hr.gwu.edu/trs-instructions](https://hr.gwu.edu/trs-instructions)

Double check meal break. If any changes were made to Banner record; meal break will set back to default setting.
Updating Meal Breaks

- Timekeepers have the ability to update employees Meal Breaks
- Meal Break instructions can be found at [https://hr.gwu.edu/trs-instructions](https://hr.gwu.edu/trs-instructions)
- Meal Break changes take effect starting the day you make the change
- To make a change select an employee
- Select the **GoTo** Button
- Select **Meal Break Change**
Updating Meal Break for Employees

- Select SAVE
- If you need the meal break back dated to the start of the unsigned off pay period contact the TRS Admin at timerep@gwu.edu
Exception Edits
Time Card Policy Review for following Exception Edits

• Timekeepers should have a detailed email from the employee stating reason edit is needed.

• Timekeepers are required to add detailed comments when editing the timecard.

• All time reporting documents including emails asking for edits need to be saved for 3 years.

• Never delete or edit time without detailed reason from employee.

• Email timerep@gwu.edu if you see hours that are not for your department.

• Contact your HR Business Partner and timerep@gwu.edu if you think there is time abuse.

• Nonexempt timekeepers should be clocking using the TRS timestamp feature.
Time Card Indicators

- Hover mouse over indicators in timecard and objects to see a *tool tip* containing details, where applicable.
- Right-click a cell within a widget; in many cases, this *opens a callout* with detailed information and icons for any questions you are allowed to perform on that cell.
- A gray triangle will appear in the corner to alert user of any type of edit made by the timekeeper.

**Time Card Indicators**

- **Missed box**
- **Long Interval**
- **Cancel Deduction**
- **Indicates an edit was made**
- **Indicates comment**
- **Missed box**
Editing Missed Punch Exceptions from Genie

• Check **Alerts** at the top of your workspace. Common alerts are for missed punches and long intervals over 16.5 hours.

Check Alerts at the top of your workspace. Common alerts are for missed punches and long Intervals over 16.5 hours.
Editing Missed Punch Exceptions from Genie

Confirm missed punch day and time
Editing Missed Punch Exceptions from Genie

Select **Add Punch** from the **Timekeeping** button

- After confirming punch time select employees name in Genie
- Select **Timekeeping** button
- Select **Add Punch**
Editing Missed Punch Exceptions from Genie

• When adding a punch enter time in military time
• In the Add Punch box you can add:
  • Day of missed punch
  • Time off missed punch
  • Secondary transfer
  • Meal break deduction
  • Transfer code to secondary position if needed
Editing Missed Punch Exceptions from Genie

• Go back to time card and confirm the punch has been added
• Add a comment if one was not added
Editing Missed Punch Exceptions from Time Card

• To add missed punch from timecard Right Click on missed punch cell
Editing Missed Punch Exceptions from Time Card

- Select **Edit icon** to add punch
Editing Missed Punch Exceptions from Time Card

• Enter time as military time or enter ‘p’ after punch to convert to PM
• Select OK
Editing Missed Punch Exceptions from Time Card

- Missed punch time now appears in cell
- You will be prompted to add a required comment once saving
Editing Missed Placed Punch

• If an employee forgets to Time Stamp, the next Time Stamp will be posted in the next available slot.
• This can make the employees shifts look wrong.

If employee misses punch the next punch will go to the next available slot.
This can make the employees shift look off.
Editing Missed Placed Punch

- The timekeeper can resolve this by selecting the last punch that was posted incorrectly and execute an “Edit Punch” command that will move it to the correct in or out punch position.
Editing Missed Placed Punch

- From the **Override** drop down select:
  - **In Punch** – will move punch to start of shift
  - **Out Punch** – will move punch to end of shift
  - **New Shift** – will move punch to start of shift. This is helpful if it’s for the next day.
- Select OK
Editing Missed Placed Punch

- Punches should fall into correct spots leaving any missed punches that the employee missed.
Editing Long Interval Exceptions

- **TRS Rule** - The out punch belongs to the day of the in punch so if an employee forgot to clock out their next clock in will appear as the out punch for the prior shift resulting in a long interval exception.
Verifying a Long Interval Exception

- If a Long Interval is correct you can Mark the exception as reviewed
- Select Quick Actions
Verifying a Long Interval Exception

- Select **Mark/UnMark** button to mark exceptions as reviewed
Verifying a Long Interval Exception

- The exceptions will turn green to mark as reviewed.
Comments
Adding Comments

• Comments for all edits are required
• **Right click** on cell to activate the comment box
• Comments should be to the point and of a business nature
Adding Comments

- Select comment icon
Adding Comments

- Select your comment
- Add a note
- Select OK
- The comment feature will allow you to add on additional comments and additional notes
When making an edit if you have not added a comment you will be prompted to add one

- Select the **Comment Box**
- A link will display below to **Add Comment**
- Select your comment choice and a note
- It will let you copy and past email text (**CTRL + C** to copy and **CTRL + V** to paste)
- If a punch is already deleted and it has a comment you will need to add another comment
Required Comment Tips

• Do one edit at a time

• If a punch needs to be deleted:
  • Delete one punch at a time
  • Remember to select “Add” to add comment to box
  • Select Save
  • Add required comment

• If you delete a punch that already has a comment you must add a NEW COMMENT not a new note
Phantom Purple Punch
A Phantom Punch in TRS occurs when an employee forgets to punch out for job one and on the same day forgets to punch back in for a job two.

TRS will insert a computer generated **purple punch** that is called a Phantom Punch.

The cause is a continuous shift from the in-punch of the first job to the out-punch of the second job or shift potentially causing an over payment.
TRS Generated Punch (Phantom Punch)

- **Right click** cell to activate Punch Actions box
- **Select Edit**
TRS Generated Punch (Phantom Punch)

• Select **Override** drop down
  - **In Punch** – will move punch to start of shift
  - **Out Punch** – will move punch to end of shift
  - **New Shift** – will move punch to start of shift. This is helpful if it’s for the next day.
TRS Generated Punch (Phantom Punch)

- The missed punch exception is now displayed
- This allows the punch to be edited by the timekeeper
- The employee and manager will now be alerted of a missed punch

![Timecards](image-url)

The missed punch exception now displays allowing punch to be edited & employee and manager to be alerted.
System Generated Notifications

• **Manager** long interval notifications for shifts longer than 16.5 hours in a day are sent out on Wednesdays and Saturdays

• **Manager** missed punch notifications are sent out on Wednesdays and Saturdays

• **Employee** missed punch notifications are sent out every day at 7:00 am
Audits
Audits

• The Audits Widget lets you review any edit made to the employee’s timecard
  • Select employee
  • Select GoTo button
  • Select Audits
Audits

- **User Column** displays number used to clock or GWid for edited punches
- **Data Source** displays device used to clock in and out
  - Teletime IP = Phone
  - Mobile Device = Mobile App
  - Timecard Editor = Computer Browser
Time Off
Time Off

- You can find details on the types of time off and leave at GW in the Time Off and Leave Guide on the Benefits Website.
  - [https://hr.gwu.edu/paid-time](https://hr.gwu.edu/paid-time)
- When an employee terminates from GW, they are paid out their accrued but unused annual time balance per the Time Off & Leave Guide.
- Sick time is not paid out.
- TRS is the system of record for employee Time Off accruals and usage.
- Make sure Time Off is recorded for all employees.

Time Off questions can be directed to Benefits at timeoff@gwu.edu or 571-553-8382
Time Off

- Time Off requests approved for nonexempt employees after department approval due date will not be paid unless a manual timesheet is submitted to payroll_payreq@gwu.edu.
- Please review Time Off Training on the Benefits Website.
Time Off

- To review requests outside of the current pay period select a date range.
- Time Off requests approved for nonexempt employees after department approval due date will not be paid unless a manual timesheet is submitted to payroll_payreq@gwu.edu.
- Please review Time Off Training on the Benefits Website:
  - [https://hr.gwu.edu/paid-time](https://hr.gwu.edu/paid-time)
- Use Calendar button to select date range of request.
- Select the Export Button to export Request Manager data.
Check Time Off Requests

- Confirm non-exempt employees do not have outstanding time off requests that would effect their pay
- If you see outstanding requests that would effect the bi-weekly pay approval please check with the employee’s manager for status of approval
- Alerts are available at the top of the workspace to alert you of submitted requests
- Requests are also accessible through My Inbox on the blue related Items bar
- Time off requests are visible to all timekeepers with access to an org but only managers or delegates should approve requests unless asked to be a backup

Check Time Off Requests

Check Alerts for Submitted Requests

Check My Inbox for Submitted Requests (Search by date range)
Managing Your Time Off

Select My Calendar from the side blue bar
This is where timekeepers & managers check accruals
This is where timekeepers & managers request time off
Historical Corrections

- The university does not allow edits or adjustments in the Time Reporting System to pay periods after the departmental due date.
- Annual and sick time off requests are allowed in prior periods.
- Payroll Services will release the hold on historical time off requests only, generally the day after the departmental due date for the pay period by close of business.
- **A manual timesheet must be submitted** to payroll_payreq@gwu.edu to adjust **non-exempt employee’s** pay, including missed annual and sick time hours.

Manual Timesheet can be found at [https://hr.gwu.edu/payroll](https://hr.gwu.edu/payroll) under Payroll Forms
Reviewing Holidays
Holidays

- Holidays pre-populate timecards for bi-weekly paid employees.
- Employees must be in paid status per their work schedule the day before and the day after to earn the holiday.
- Non-exempt part-time employees default in TRS with 4 hours of holiday (timekeepers may need to adjust holiday per FTE).
The number of prorated holiday hours is equal to an employee’s weekly scheduled hours (from Banner) divided by five weekdays worked. See the table below for examples:

<table>
<thead>
<tr>
<th>Scheduled Work Hours</th>
<th>Holiday Proration Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>36</td>
<td>7.20</td>
</tr>
<tr>
<td>30</td>
<td>6.00</td>
</tr>
<tr>
<td>24</td>
<td>4.80</td>
</tr>
<tr>
<td>16</td>
<td>3.20</td>
</tr>
</tbody>
</table>

The holiday hours for non-exempt part-time employees who have an FTE other than 50% must be manually adjusted in TRS to ensure correct holiday pay is received.

Instructions can be found at https://hr.gwu.edu/paid-time
Editing Holiday Hours for Non-Exempt Part-Time Employees

- Select the plus sign to insert an additional row to add or subtract time from the Holiday

<table>
<thead>
<tr>
<th>Date</th>
<th>Schedule</th>
<th>Pay Code</th>
<th>Amount</th>
<th>In</th>
<th>Transfer</th>
<th>Out</th>
<th>Shift</th>
<th>Daily</th>
<th>Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sun 8/25</td>
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<td>Mon 9/2</td>
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<tr>
<td>Wed 9/4</td>
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<tr>
<td>Thu 9/5</td>
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<tr>
<td>Mon 9/9</td>
<td></td>
<td>Labor Day 2019</td>
<td>4.0</td>
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<td>Wed 9/4</td>
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<td>Thu 9/5</td>
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</table>

Click on the plus sign to insert an additional row.
With the new blank line, select the pay code cell to display a drop-down box. Enter ‘H’ in the search box and select ‘HOL’.
Editing Holiday Hours for Non-Exempt Part-Time Employees

- Select **Tab key** after entering in amount to update record
- The updated holiday will appear in the **Totals** section
- Select **Save button** to commit changes
Removing Holiday

Under the Time Off and Leave Guide policy found at https://hr.gwu.edu/paid-time, non-exempt employees scheduled to work will be paid as if the day were not a holiday and will be provided a substitute day off, to be used by the end of the fiscal year.

The employee and their manager are responsible for tracking and coordinating the substitute day off.

- Click on the **Plus (+)** sign next to the holiday date to add an additional row.
- Click in the **Pay Code column** cell below the holiday to display the available pay codes.
- Select the **HOL** pay code from the list.
- Click in the Amount column cell that corresponds to the pay code you selected.
- Enter a negative sign and the amount of hours the employee should be deducted for the holiday and hit **Save**.
Terminations
Checking Terminations

- Select **All Home-Termed_BW** to review bi-weekly paid employee's on termed list every bi-weekly.

- If there are termed employees review the hours and approve.

- If the employee worked past their termination date please submit a rehire request to the appropriate area such as Student Employment or your HR Business Partner to ensure prompt payment of hours worked.

- Employee must be hired into a position for payment.
Approving Time
Checklist Before Approving

- Confirm there are no missed punches
- Confirm there are no long shifts
- Confirm there are no phantom punches
- Confirm meal break settings
- Confirm comments and documentation has been obtained for all timecard edits
- Confirm Totals section (confirm time is charging to correct org/position)
- Confirm part time Holidays have been updated if needed
- Confirm Time Off requests have been approved
- Confirm there are no exempt employees pre-populated with time after their termination date
- Confirm employee's are approved on All Home-Termed-BW list
Approving Employees from Genie

- It is recommended to approve from the Manager Approval Genie
Approving Employees from Genie

- The **Select All Rows** button will select all your employees.
Approving Employees from Genie

- **Ctrl + right click** your mouse to deselect an employee if needed
Approving Employees from Genie

- Select Approval Button
- Select Approve Timecard
Confirming Approval

- Select **Refresh** on Genie
- Once approved employees will show a 1 or higher in Manager Approval column
- Higher than one can be due to more than one position or multiple approvers for one department
- 1 (Partial) means the employee is new and their start date is not the first Sunday of the bi-weekly
Approving from the Timecard

- Open up Timecard
- Select Approve Timecard button
Approving from the Timecard

- Select Approve Timecard
Confirming Timecard Approval

- Once approved a display message will appear that the time card has been approved.
- The timecard will turn **yellow** once approved by the timekeeper.

*TRS will display info message that time has been approved, timecard will turn yellow (color may depend on browser)*
Confirming Timecard Approval

• The timecard will turn Green if approved by a timekeeper who is also the employee
• All Timekeepers should have another person approve their timecard
Approving from the Timecard

- The timecard will turn **Gray** when signed off by Payroll Admin (*this freezes time*)
Reports
To run any report:

- Select date range
- Select employees to run a report
- Select the **GoTo** button
- Select Reports from the drop down
To run any report:

- You have an option to run the report and open it from Check Report Status
- You can have the report emailed to you
- You can Schedule the report to run and emailed to someone

Choose to Run, Email, or Schedule report
Reports

- Instructions on running reports can be found at https://hr.gwu.edu/trs-instructions
- The most common reports run are found on the Payroll Website
- Contact timerep@gwu.edu if you are looking for a report

Reports

- Running & Scheduling Reports for Active and Terminated Employees (PDF)
- Running Timecard Audit Trail Report (PDF)
- Reading Timecard Audit Trail Report (PDF)
- Reading Timecard Audit Trail (PDF)
- Reading GW Payreport (PDF)
- Running GW Payreport (PDF)
- Employee Transactions & Totals Report in Excel Format (PDF)
- Request Manager Export Button (PDF)
- Punch Origin Report (PDF)
TRS Training Complete

- New users will be granted access within 48 hours of receiving email of completion from employee
  - TRS Quiz needs to be passed (send email confirmation of completion to timerep@gwu.edu)
  - TRS Form needs to be fully signed and submitted
- If you have not sent in a TRS request form please send it to timerep@gwu.edu
- The TRS access form can be found at https://hr.gwu.edu/payroll under Forms