TRS New User Training

TRS Functionality Part II

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Payroll Services
TRS Administrator
timerep@gwu.edu or 571-553-4407

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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

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Note:

This training will cover edit & approval access

Your access level will reflect what is requested on your TRS Access Form

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Additional Resources for Training

- Employee Handbook: https://hr.gwu.edu/compensation
- Benefits Time Off System - https://hr.gwu.edu/paid-time
- Payroll Website: https://hr.gwu.edu/payroll
- Payroll Tip Sheets -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
  - Employee Training Videos including the TRS Training videos
  - Additional Timekeeper Training Videos

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TRS New User Training

- Logging into UKG
- UKG Timekeeping Function and Settings

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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

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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.

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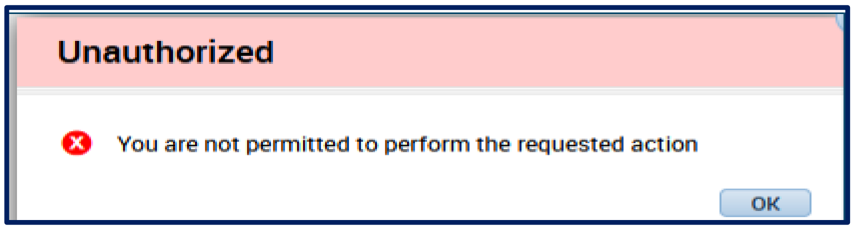
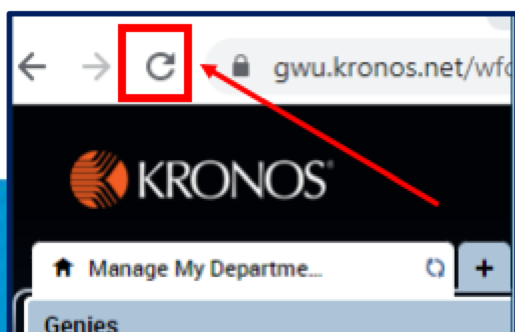
System Time Out

- 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**

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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

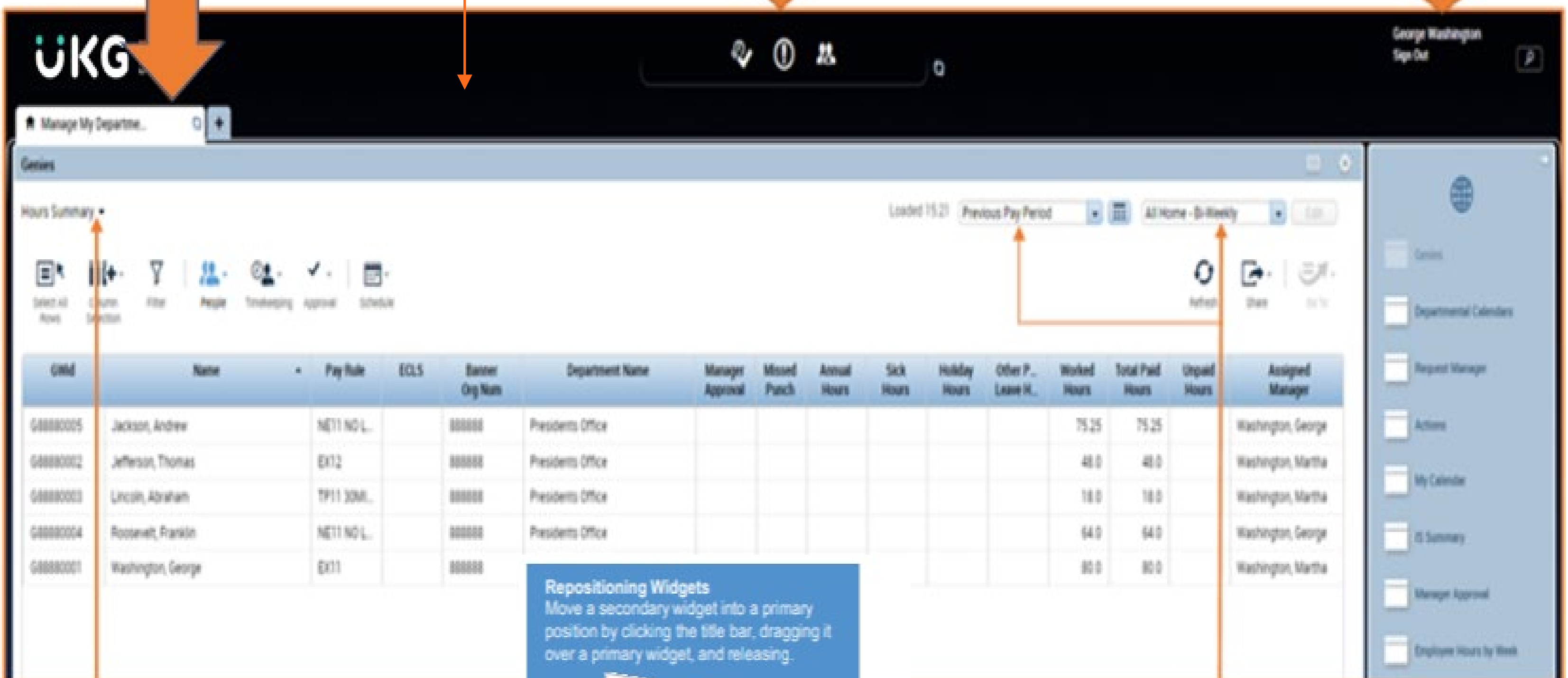
Manager Navigator

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

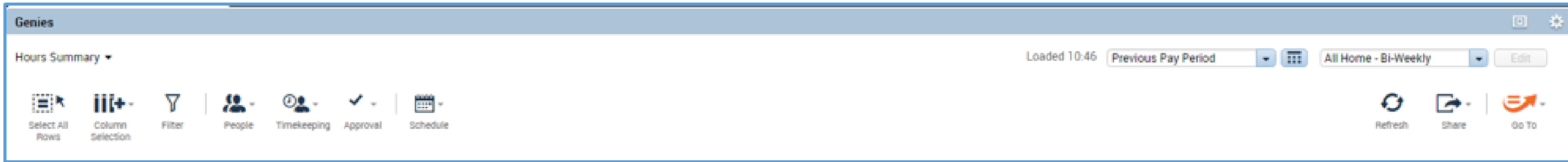


Additional Genies
Access additional Genies by selecting the arrow next to the ***Hours Summary*** default Genie. This will bring up a list of additional Genies.

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.

Workspace Toolbar



Filter lets you search on selected Genie rows

Schedule can be used for bi-weekly Exempt employees

Refresh will refresh the data on the Genie

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

Approval button is used to approve from the Genie

Share gives options to print Genie or export Genie in Excel or CVS output

Select All Rows lets you select all employees in a Genie

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

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)*

People shows employee info such as; accrual info, primary job info, meal break setting

Workspace Content

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

Genies

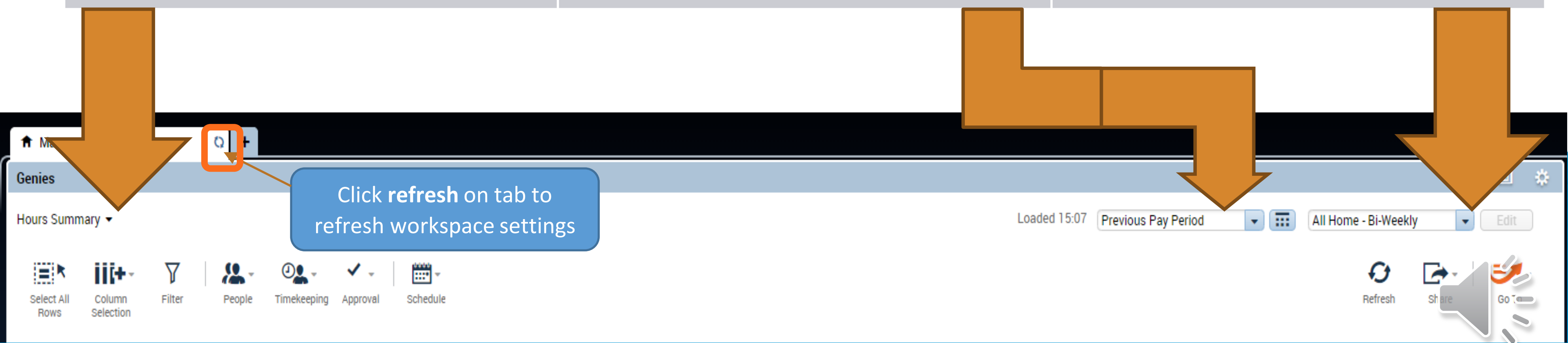
- **Hours Summary -** *(default)*
- **QuickFind** – *Search for employees*
- **Manager Approval** – *displays manager approval*
- **Reconcile Timecard for Payroll** – *Used if you have work schedules*
- **Accrual Reporting Period** – *Shows time off balances*
- **SignOff Issues –** *Quick view of exceptions and unapproved timecards*
- **Reconcile Timecard –** *Genie for departments that use work schedules*
- **Employee Hours by Week –** *Shows overtime column*
- **Pay Period Close –** *Like Hours Summary has field showing if timecard is signed-off*
- **IS Summary –** *Shows employee username, email address info*

Time Periods

- **Pervious Pay Period** (default)
- **Current Pay Period**
- **Next Pay Period**
- **Current Schedule Period** (*displays week format - employees are clocking in and out for*)
- **Previous Scheduled Period** (*displays week format -last scheduled week employees were clocking in and out for*)
- **Next Scheduled Period** *(displays week format – next scheduled)*
- **Week to Date**
- **Last Week**
- **Yesterday**
- **Today**
- **Yesterday plus 6 days**
- **Last 30 days**

HyperFinds

- **All Home - Bi-Weekly**: Shows only bi-weekly paid employees (*default*)
- **All Home - Monthly**: Shows only monthly paid employees (*choose from drop down*)
- **All Home and Transferred in Employees**: Shows bi-weekly and monthly employees (*choose from drop down*)
- **All Home - Termed**: Shows anyone terminated in the TRS (*choose from drop down*)



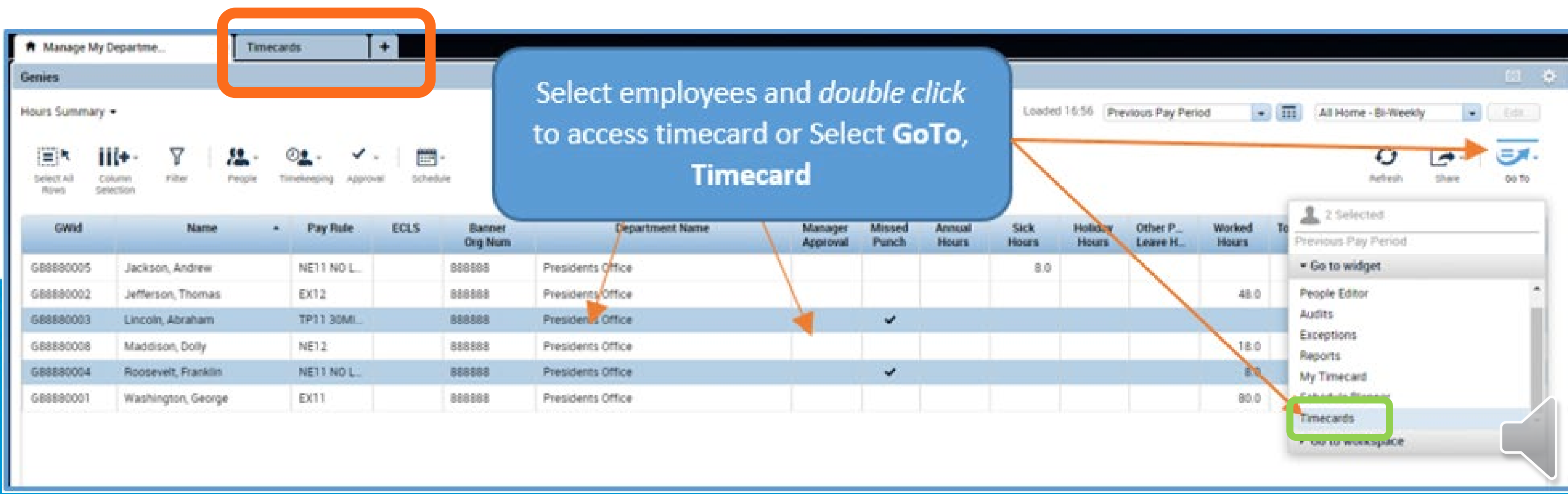
UKG Terms

- **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.

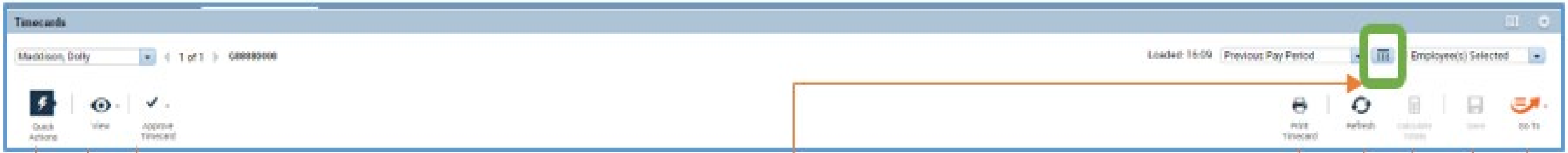
Reviewing Nonexempt Time Card

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



View allows you to only see Exceptions

Approve Timecard allows you to approve or remove a timecard approval

Quick Actions allows you to Mark and fix 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.

GoTo allows access to other widgets available

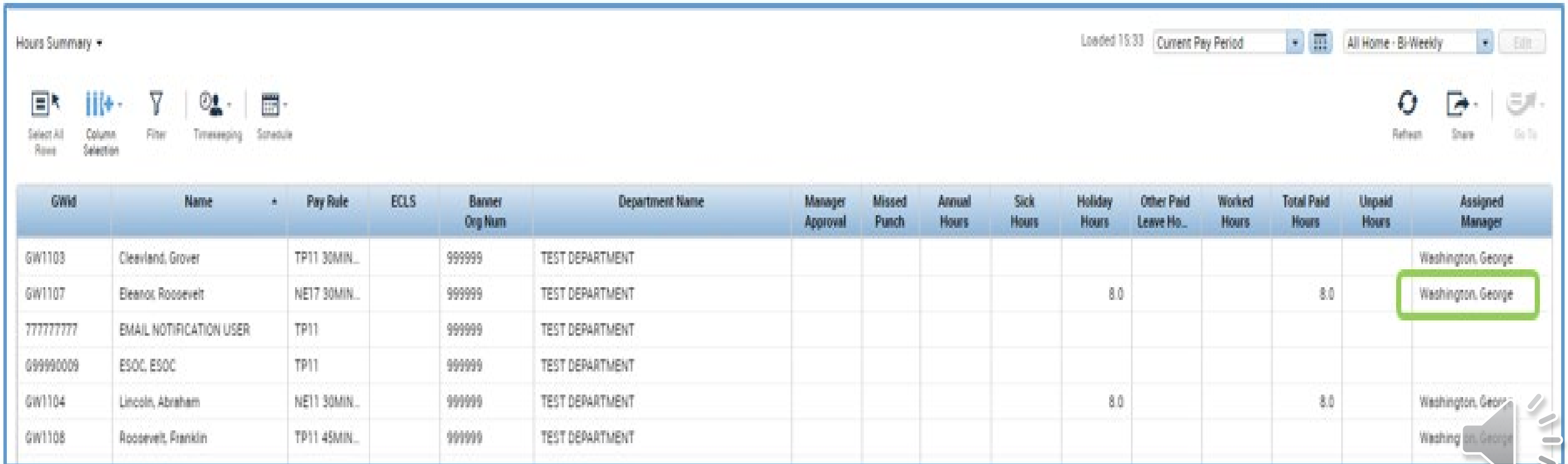
Refresh allows you to refresh Timecard

Calendar button allows date range entry. (***You can search back 10 years on employees records***)

Assigned Managers

Assigned Managers for Regular Employees

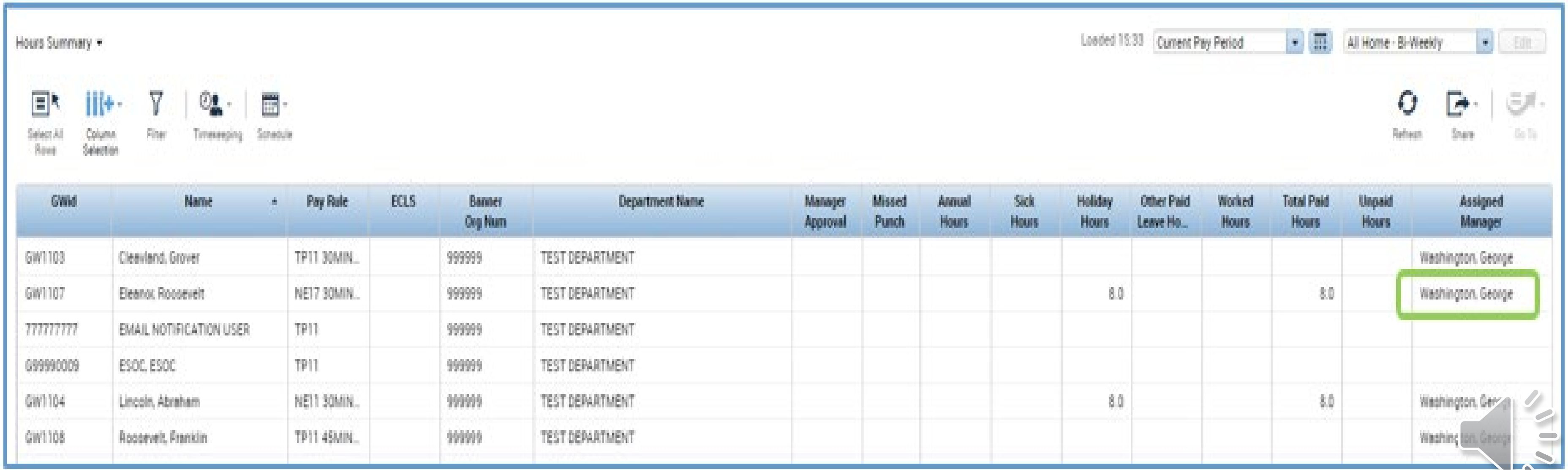
- Assigned Managers are used for Time Off approval in TRS
- Assigned Managers are pulled from Banner
- If the Assigned Manager is wrong contact your HR Business Partner
- To correct an Assigned Manager the HR Business Partner will work with Compensation to update the info in Banner. Once updated it will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



GWid	Name	Pay Rule	ECLS	Banner Org Num	Department Name	Manager Approval	Missed Punch	Annual Hours	Sick Hours	Holiday Hours	Other Paid Leave Ho...	Worked Hours	Total Paid Hours	Unpaid Hours	Assigned Manager
GW1103	Cleavland, Grover	TP11 30MIN...		999999	TEST DEPARTMENT										Washington, George
GW1107	Eleanor, Roosevelt	NE17 30MIN...		999999	TEST DEPARTMENT					8.0			8.0		Washington, George
777777777	EMAIL NOTIFICATION USER	TP11		999999	TEST DEPARTMENT										
G99990009	ESOC, ESOC	TP11		999999	TEST DEPARTMENT										
GW1104	Lincoln, Abraham	NE11 30MIN...		999999	TEST DEPARTMENT					8.0			8.0		Washington, Geor
GW1108	Roosevelt, Franklin	TP11 45MIN...		999999	TEST DEPARTMENT										Washing

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.



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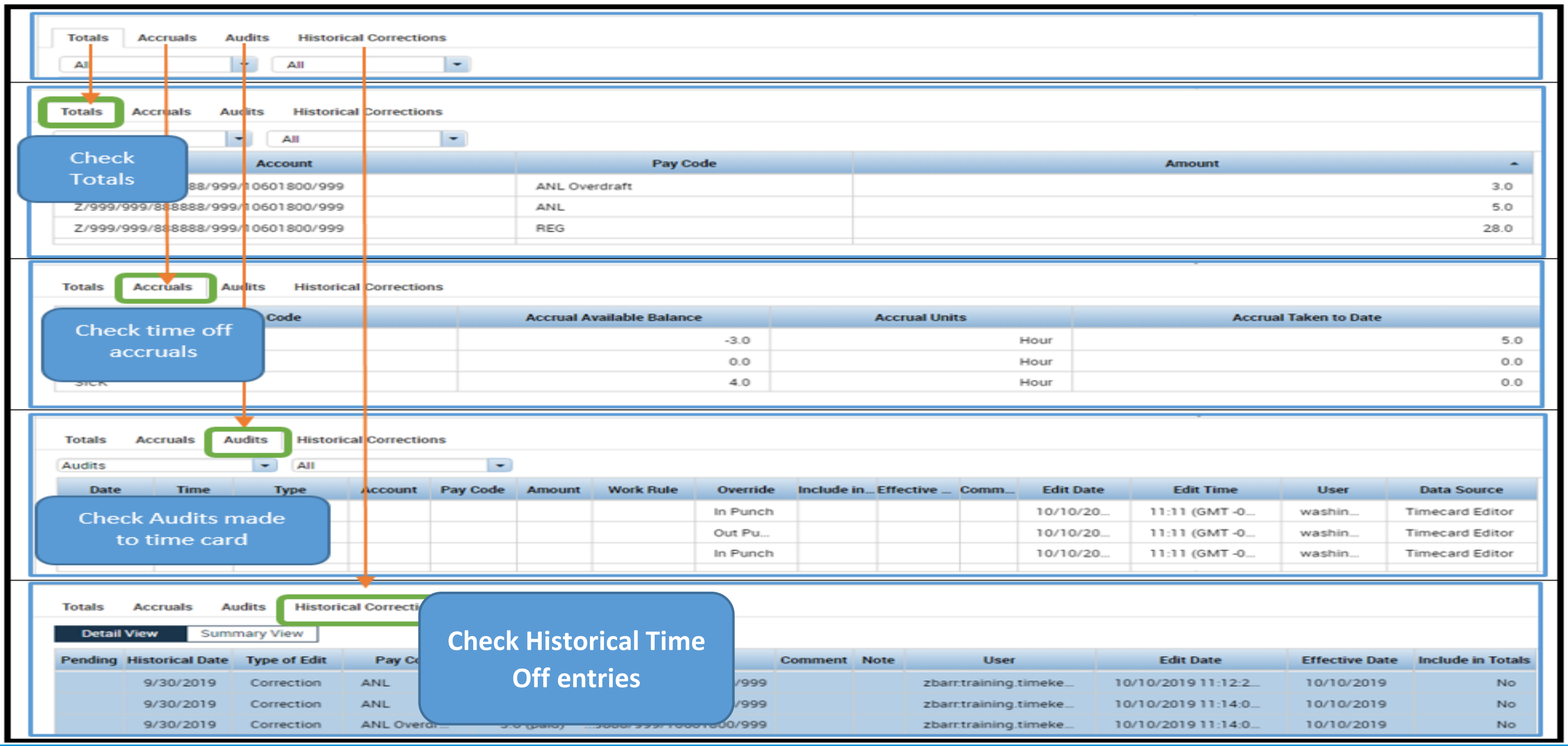
G99990009	ESOC, ESOC	TP11		999999	TEST DEPARTMENT										
GW1104	Lincoln, Abraham	NE11 30MIN...		999999	TEST DEPARTMENT					8.0			8.0		Washington, Ge[illegible]
GW1108	Roosevelt, Franklin	TP11 45MIN...		999999	TEST DEPARTMENT										Washington, George

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 employees time card before sign-off
- **Historical Corrections** allows you to review all edits made to an employees timecard after sign-off



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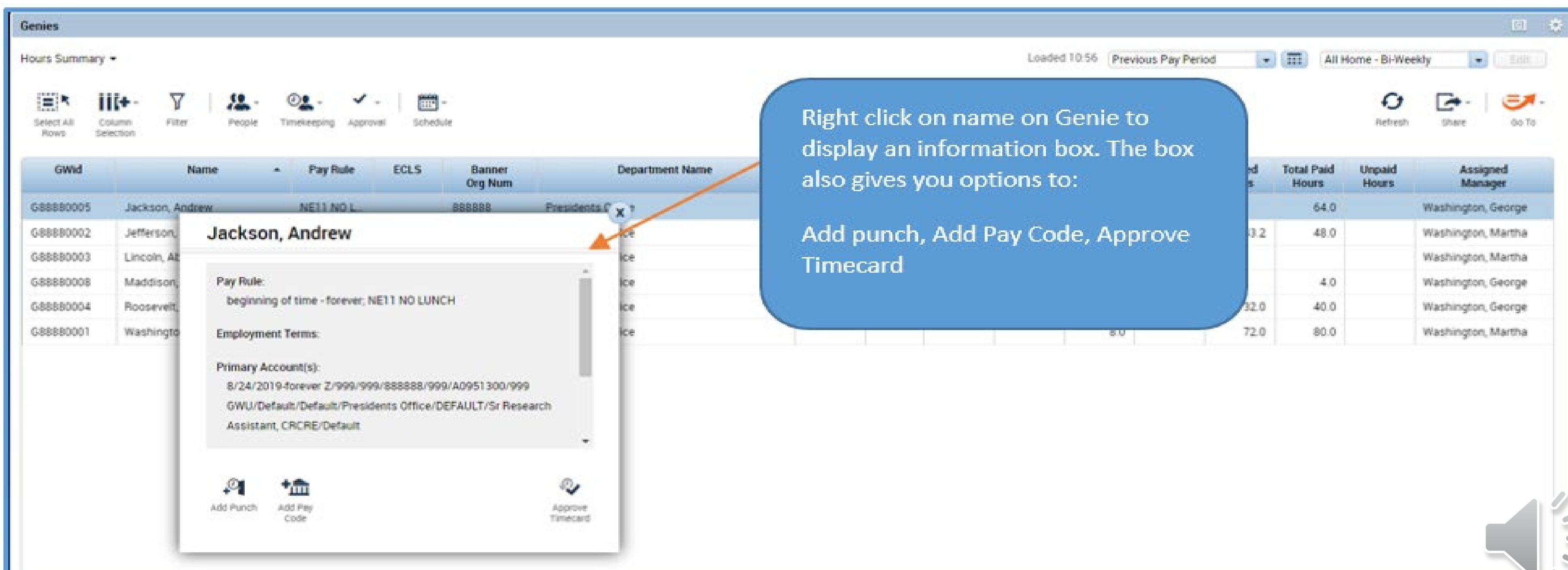
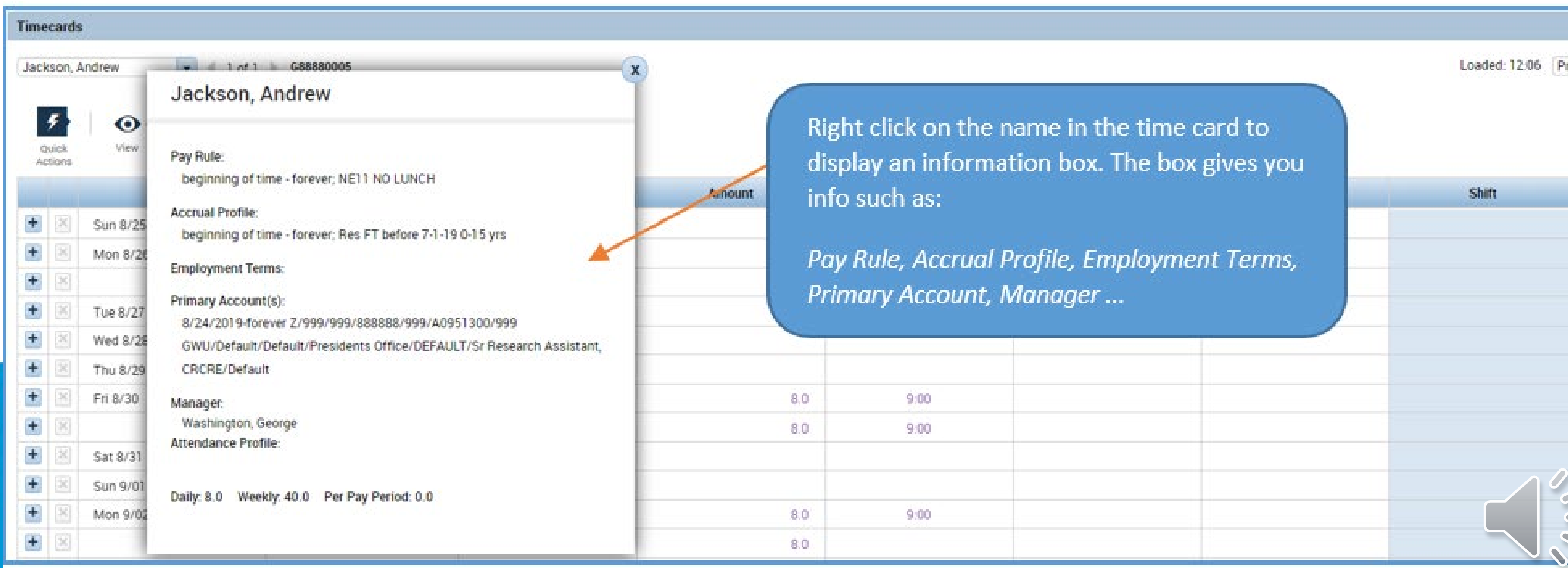
Genie Employee Info Box

- 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

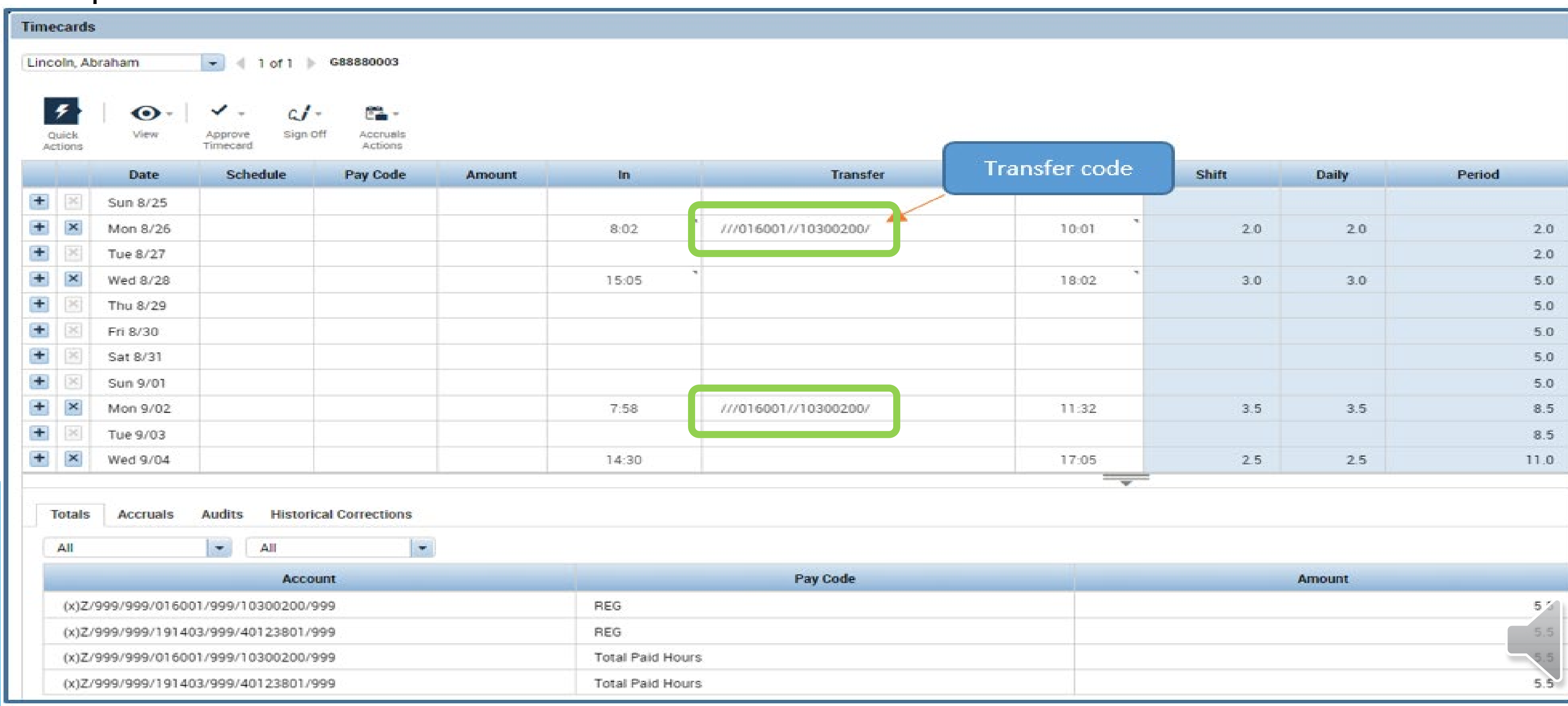
- Right click on the employees name on the **timecard** to display an info box
- The info box will display information such as Pay Rule, Accrual Profile, Employment terms and Primary account



Secondary Positions

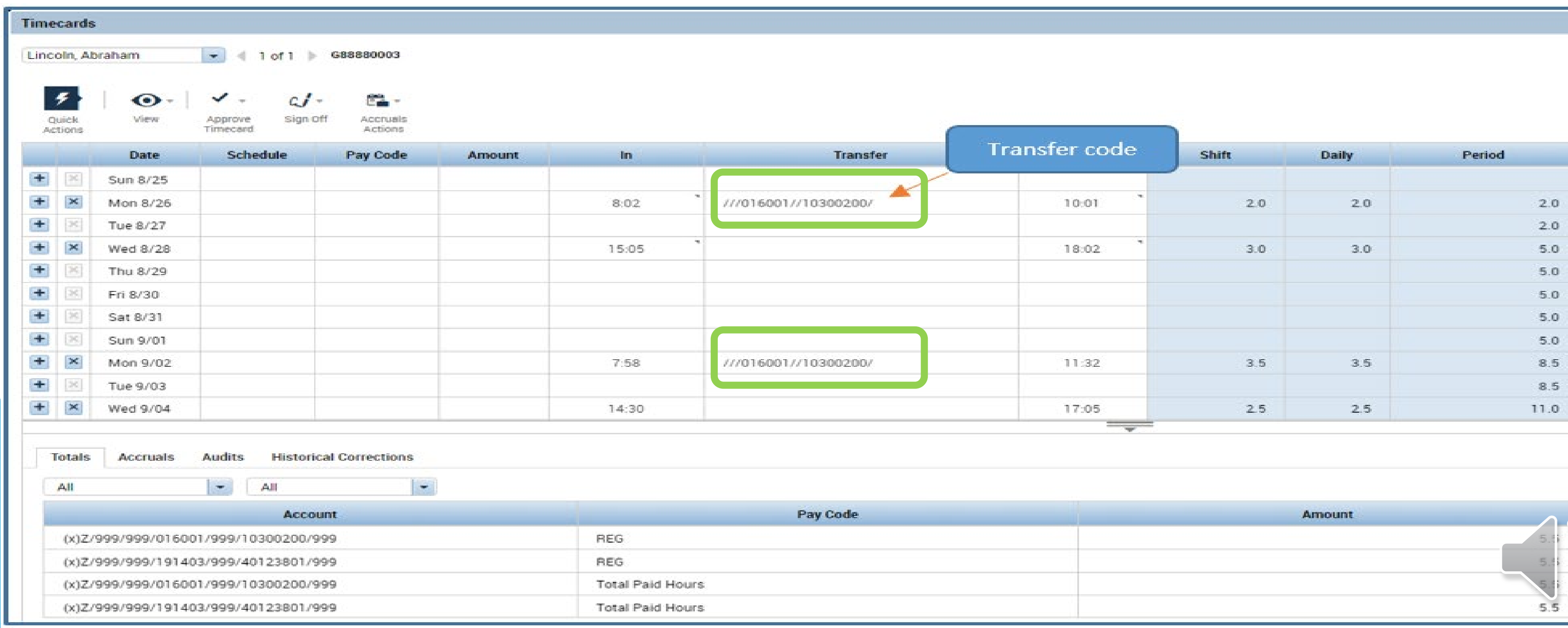
Bi-Weekly Employees with Secondary Jobs

- 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



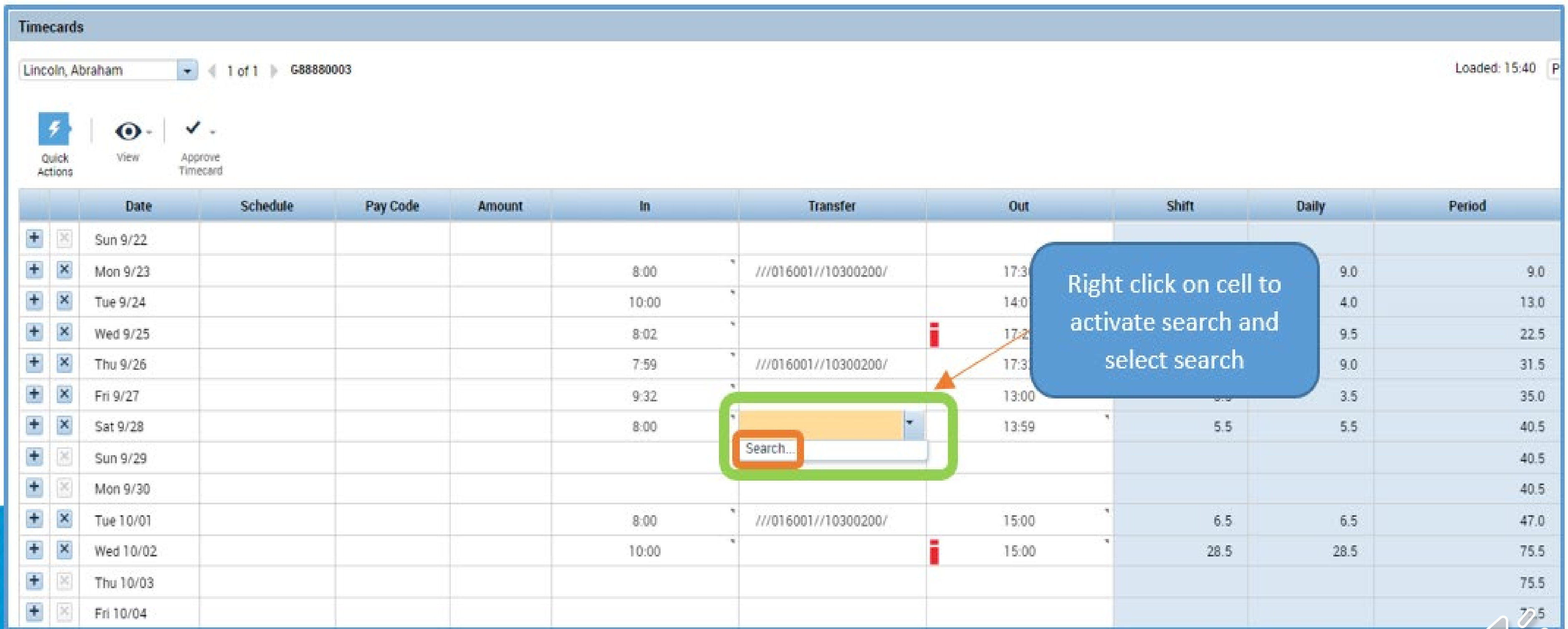
Bi-Weekly Employees with Secondary Jobs

- 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.



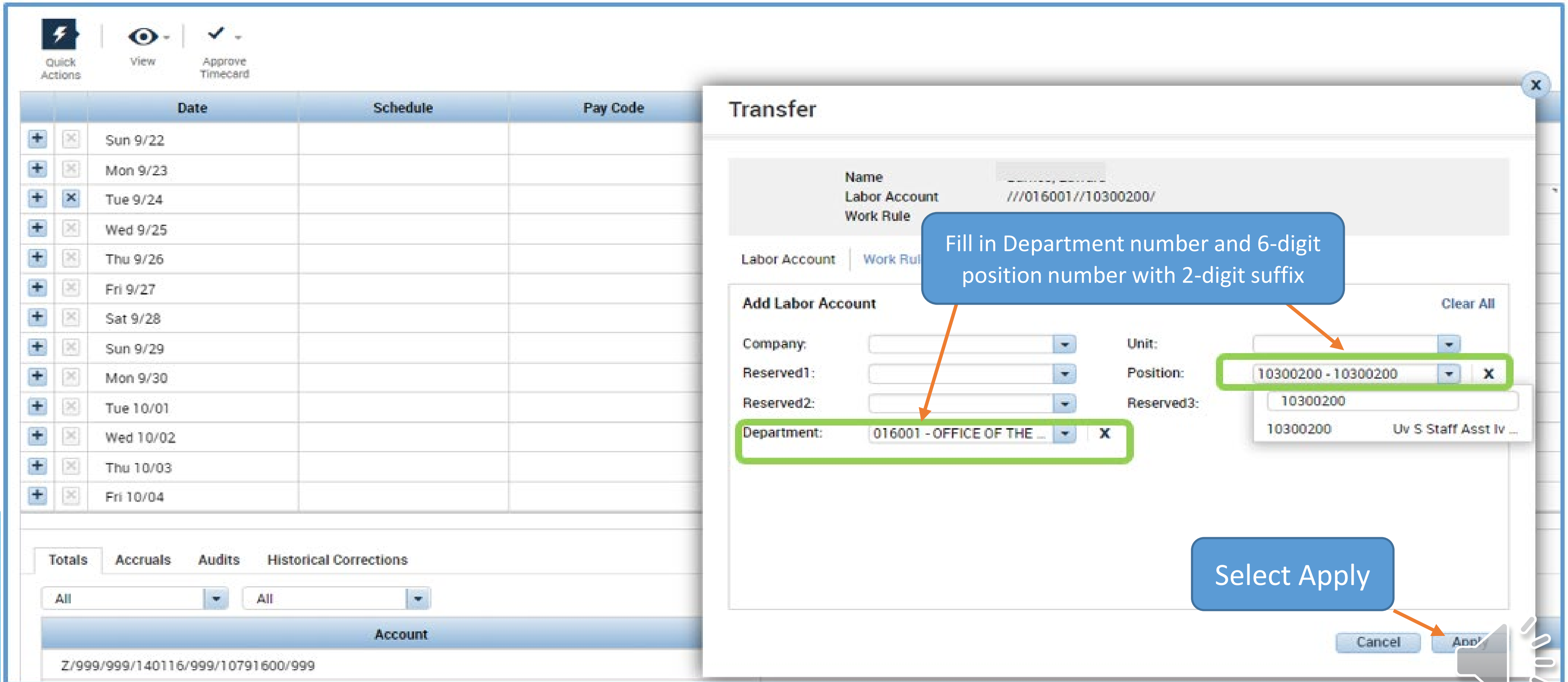
Adding Transfer Code

- 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



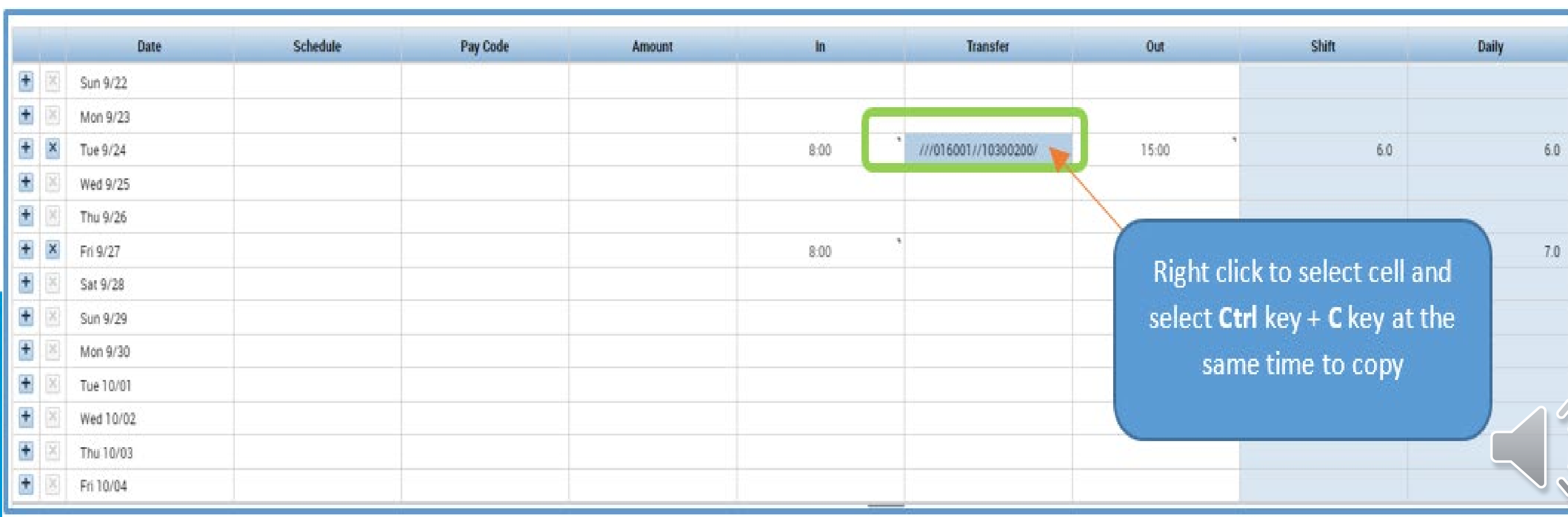
Adding Transfer Code

- 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

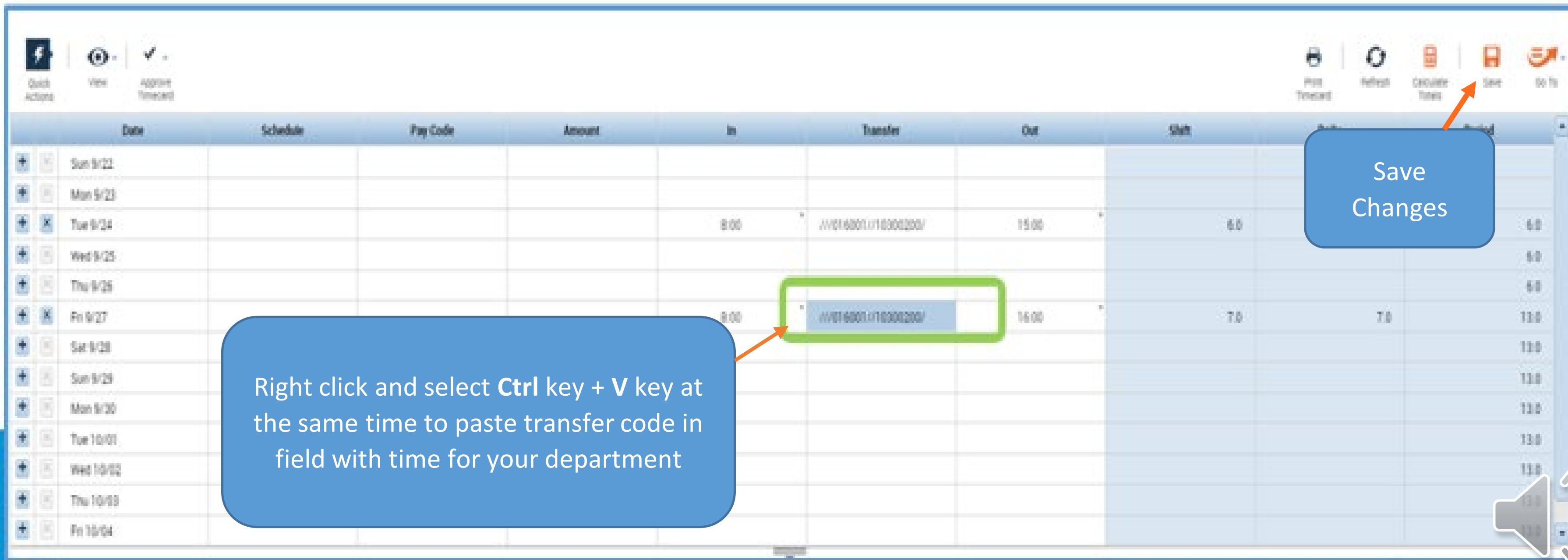
- Transfer codes can be added by using the keyboard keys
- Right click to select a cell and highlight the transfer number
- Select **Ctrl + C** to **COPY** in a field that has time for your department
- Select the tab key to activate changes



Date	Schedule	Pay Code	Amount	In	Transfer	Out	Shift	Daily
Sun 9/22								
Mon 9/23								
Tue 9/24				8:00	///016001//10300200/	15:00	6.0	6.0
Wed 9/25								
Thu 9/26								
Fri 9/27				8:00				7.0
Sat 9/28								
Sun 9/29								
Mon 9/30								
Tue 10/01								
Wed 10/02								
Thu 10/03								
Fri 10/04								

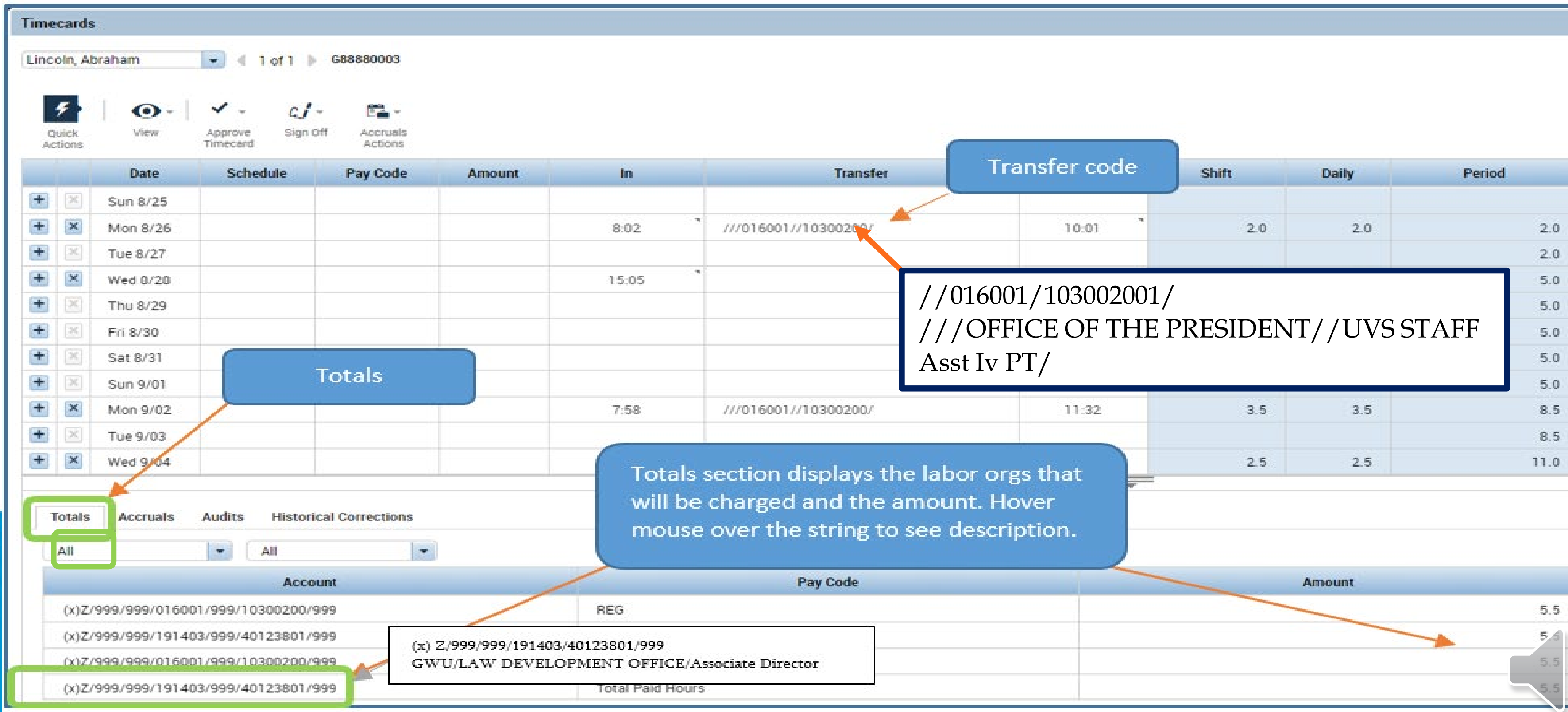
Copy and Paste Transfer Codes

- 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



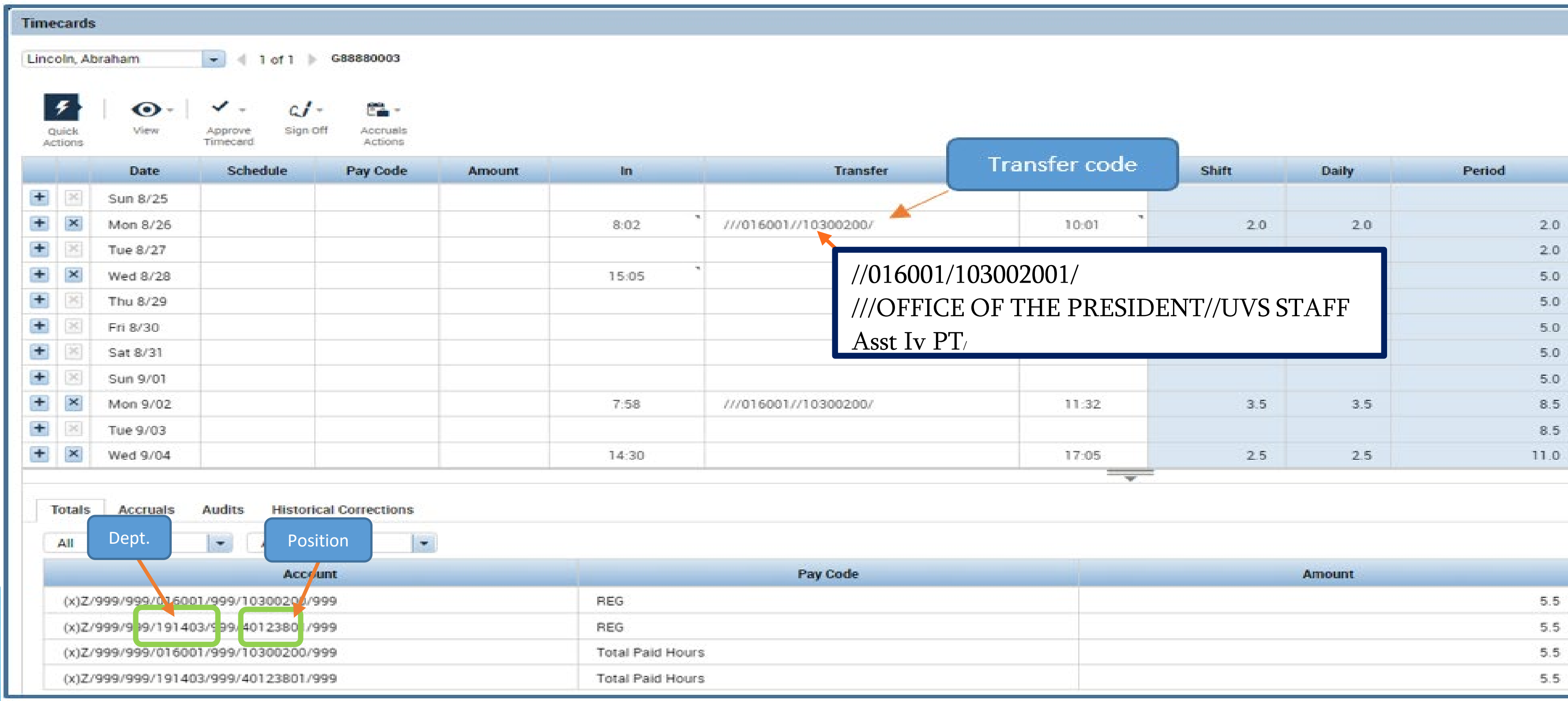
BW Secondary Jobs & Totals Tab

- 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

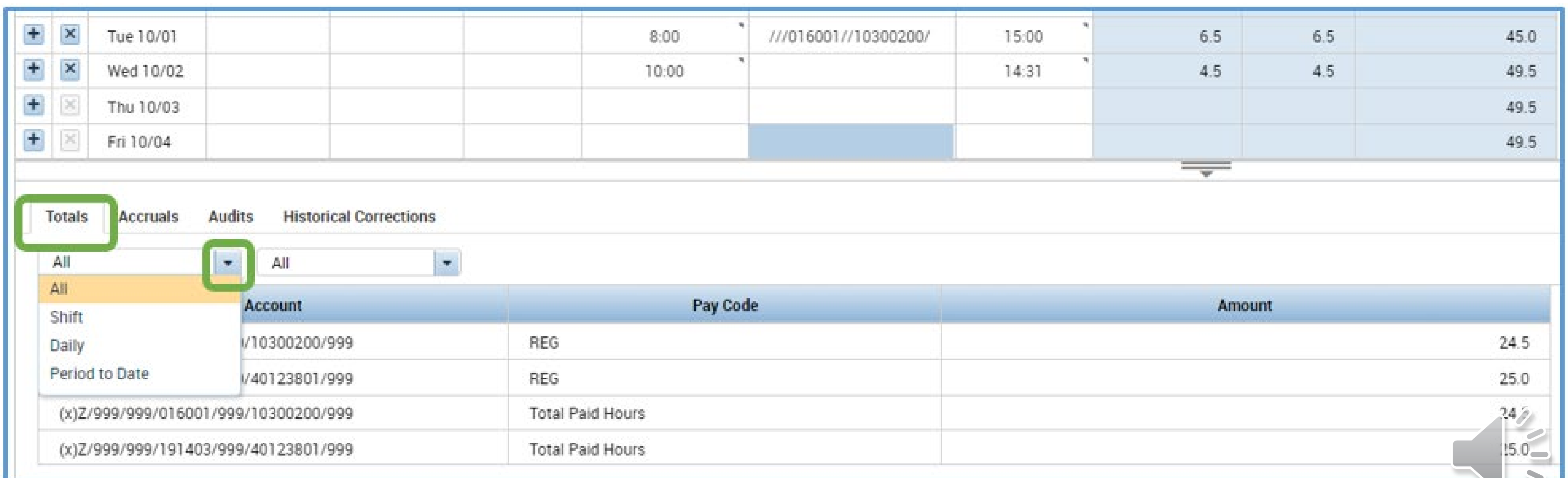
- The **3rd** number in the labor string displays the Department and the **5th** place holder in the labor string displays the Position number



Totals Tab

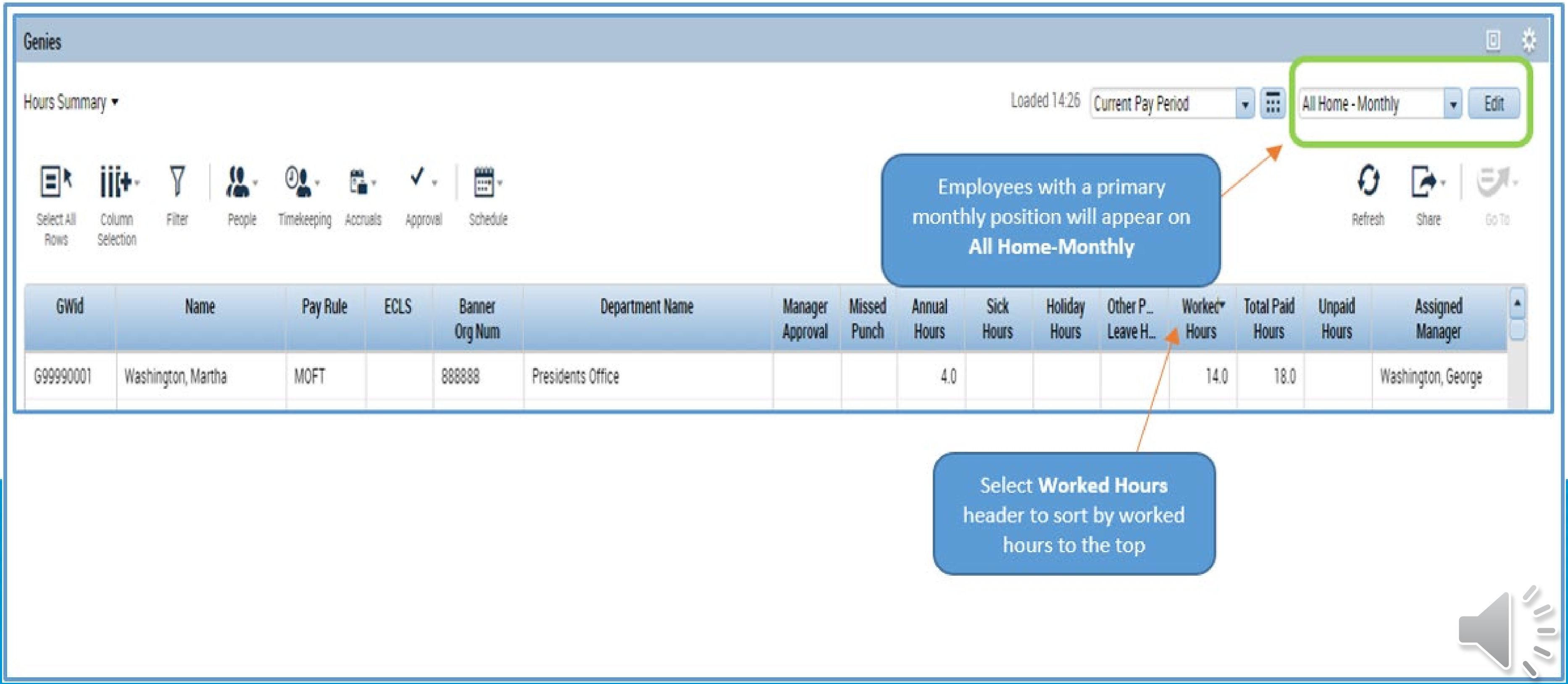
Select drop down arrow on Totals tab to get a different view of charges

- **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



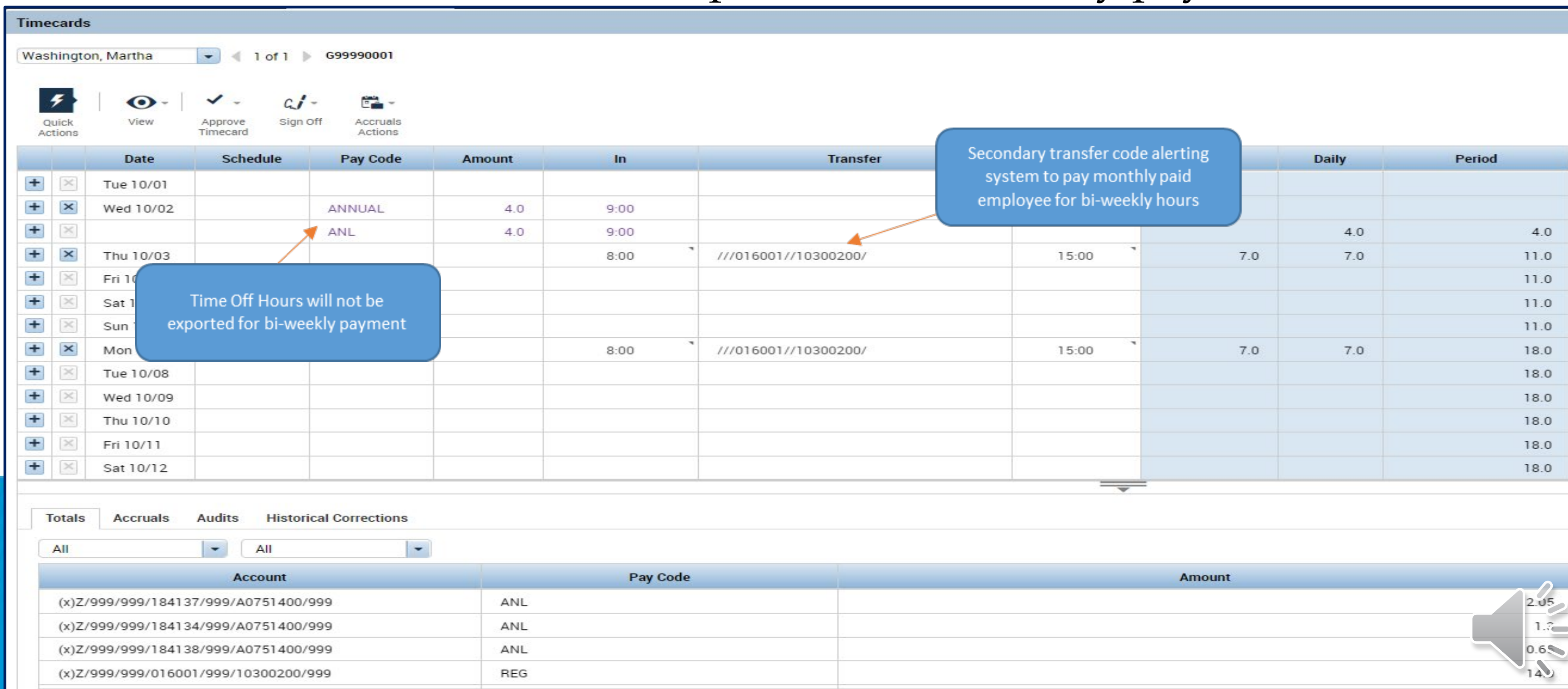
Monthly Employees with Secondary Jobs

- 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

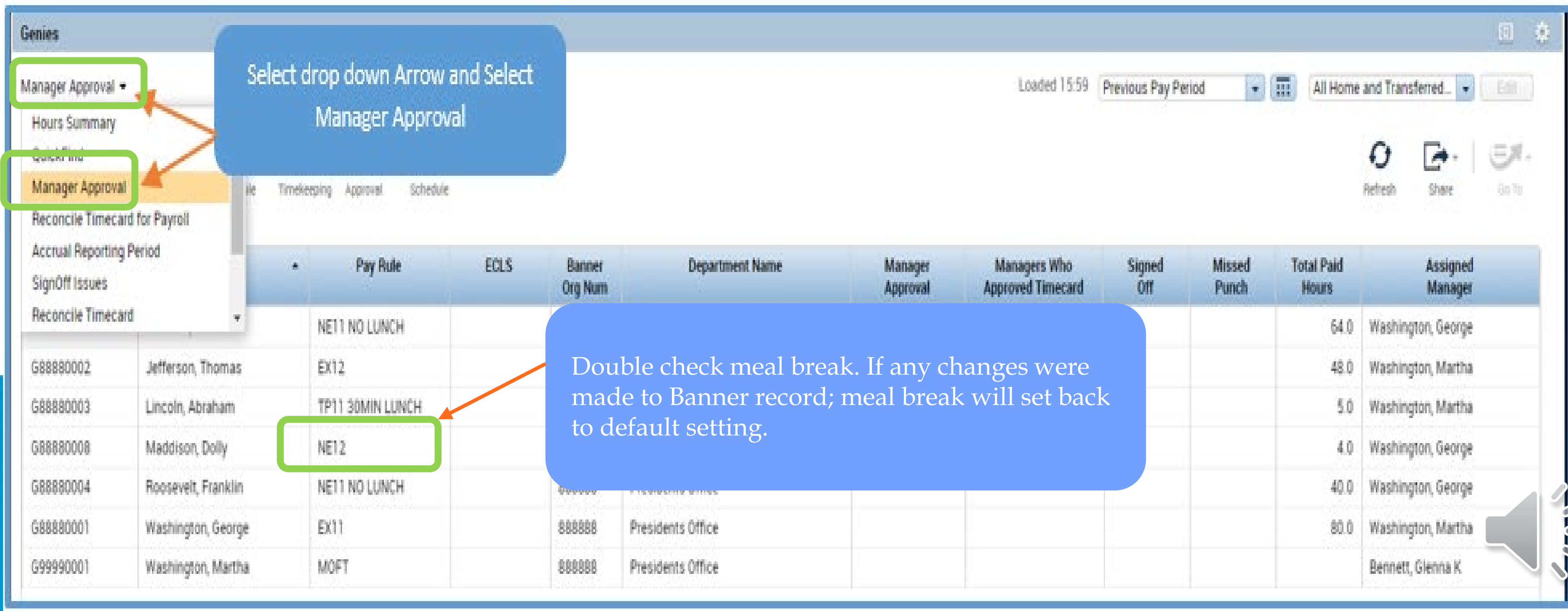
- **Employee will need to clock in and out hours for secondary position** through the phone
- The transfer code with the bi-weekly hours will appear on the timecard
- Time Off Hours will not be exported for bi-weekly payment



Meal Breaks

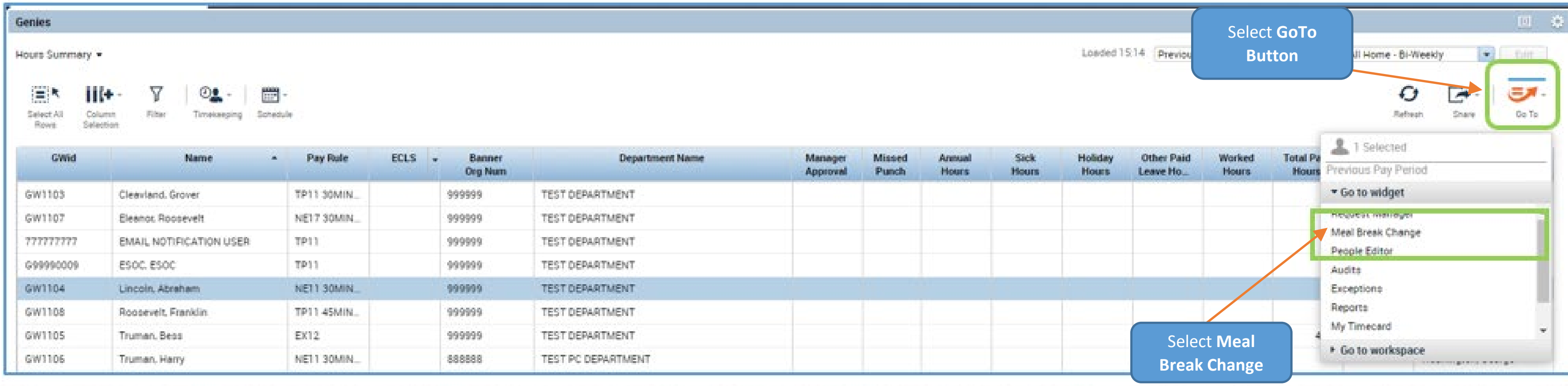
Confirming Meal Breaks

- 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



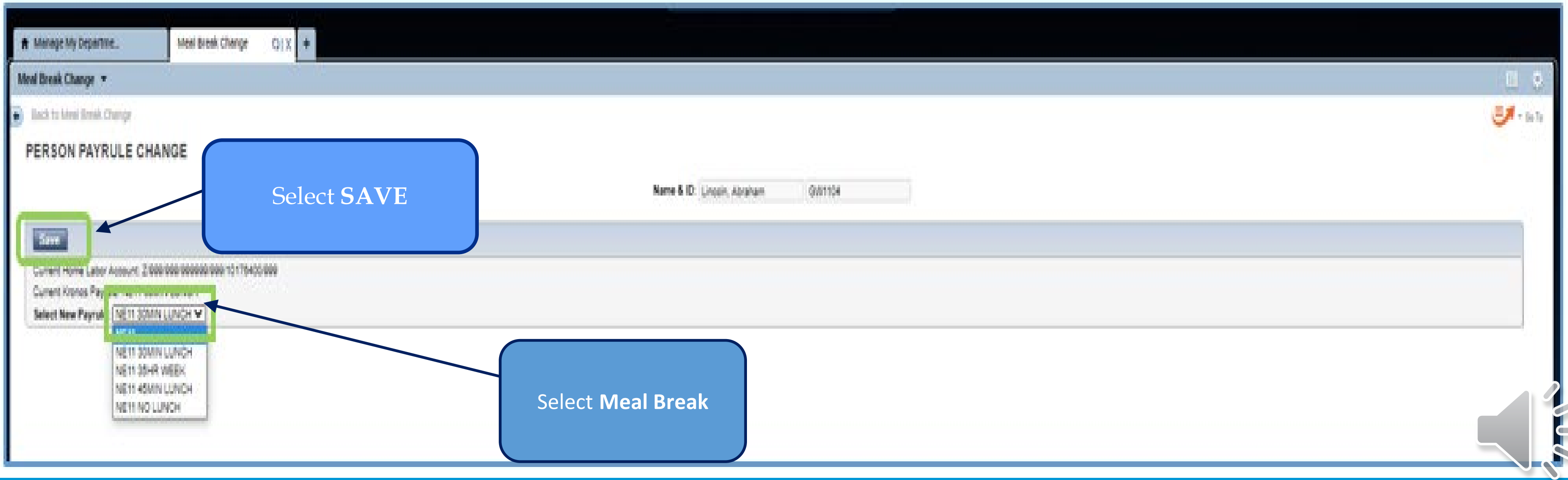
Updating Meal Breaks

- Timekeepers have the ability to update employees Meal Breaks
- Meal Break instructions can be found at https://hr.gwu.edu/trs-instructions
- 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

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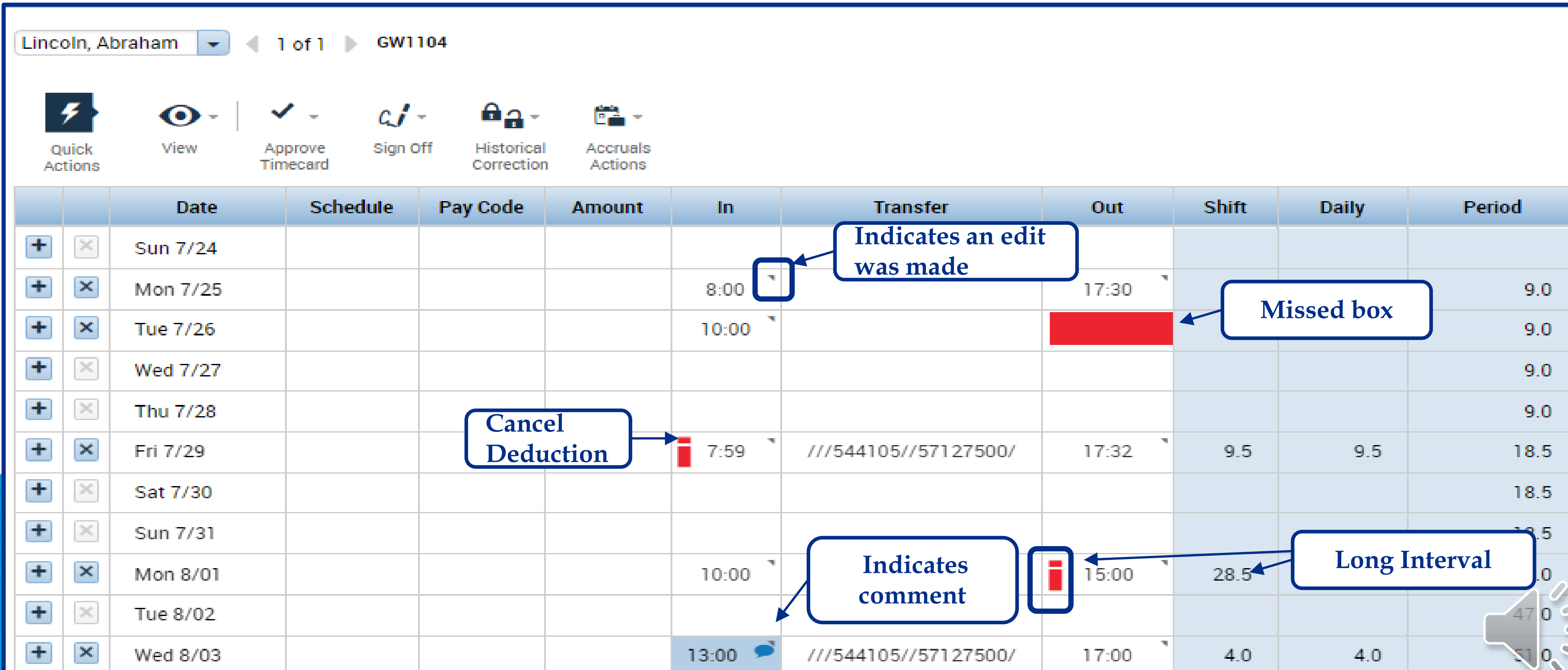
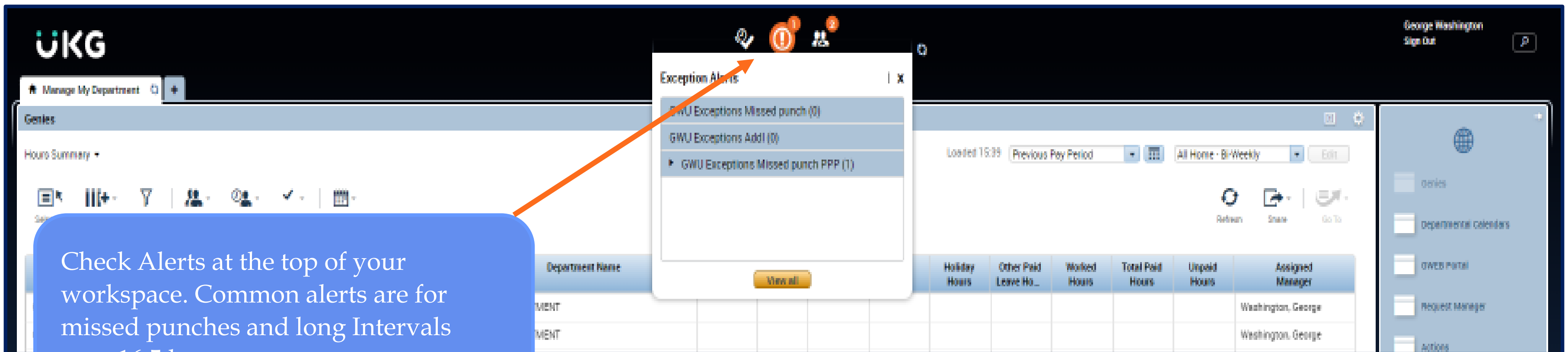
Time Card Indicators

- 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



Editing Missed Punch Exceptions from Genie

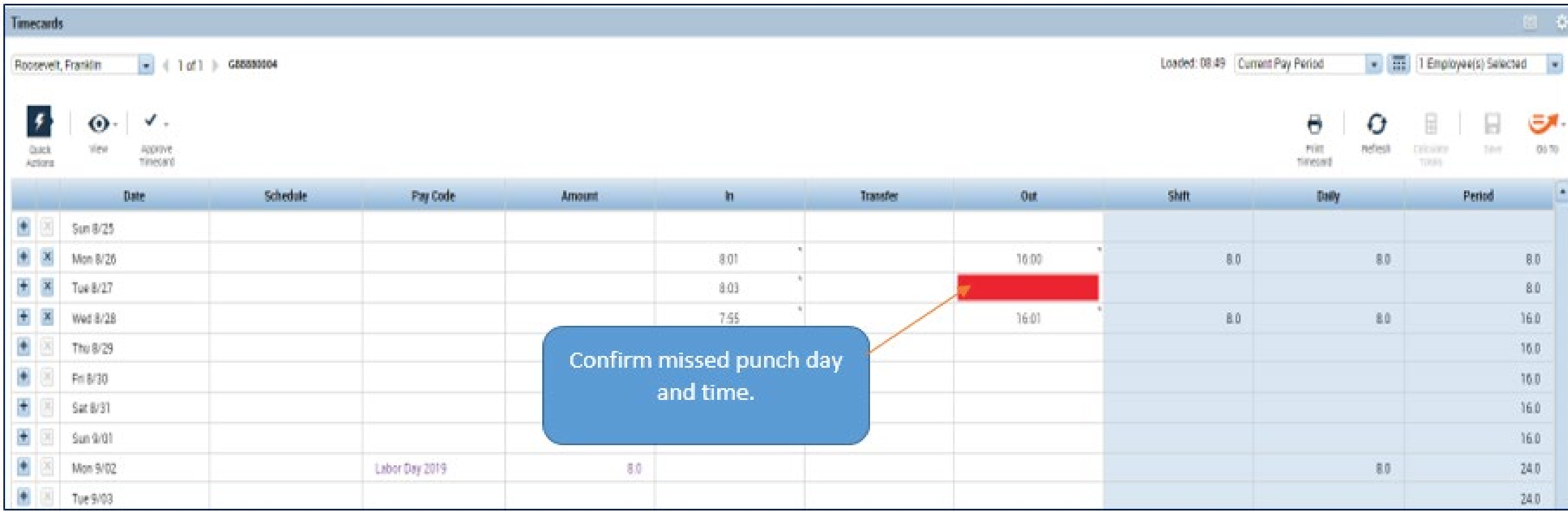
- Check **Alerts** at the top of your workspace. Common alerts are for missed punches and long intervals over 16.5 hours.



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

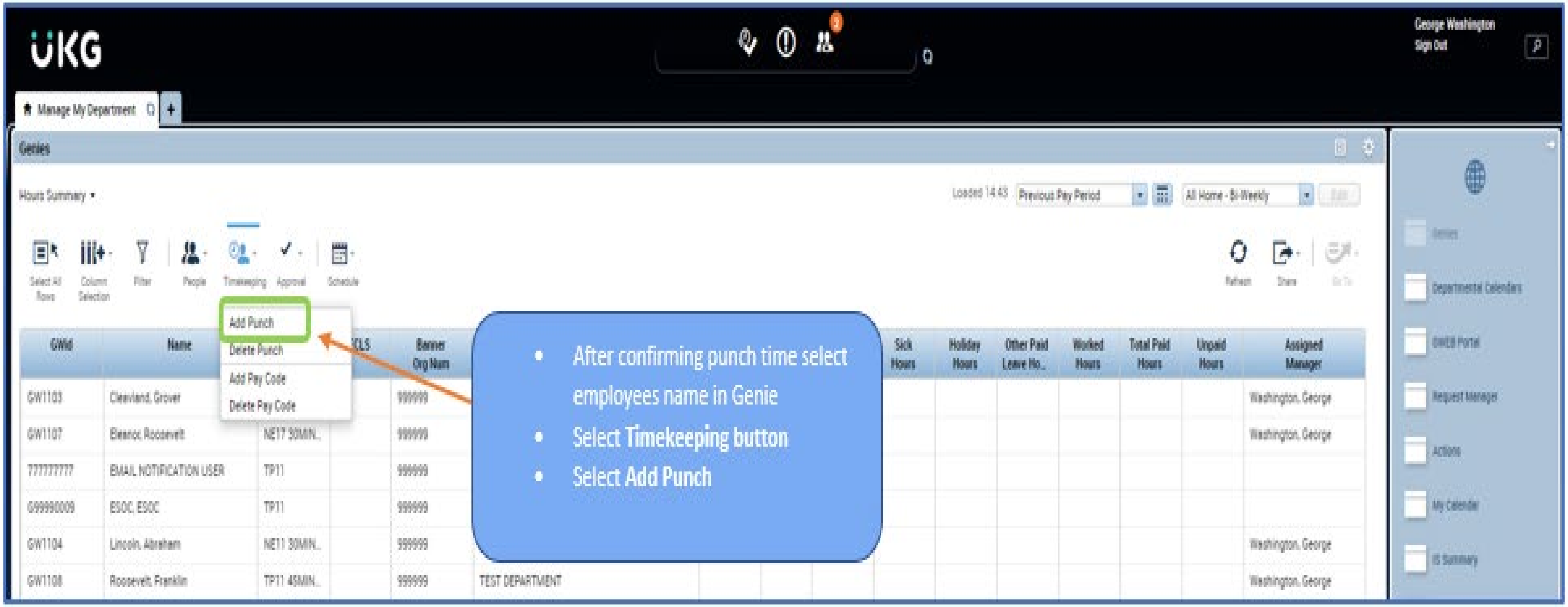
Editing Missed Punch Exceptions from Genie

Confirm missed punch day and time



Editing Missed Punch Exceptions from Genie

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



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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

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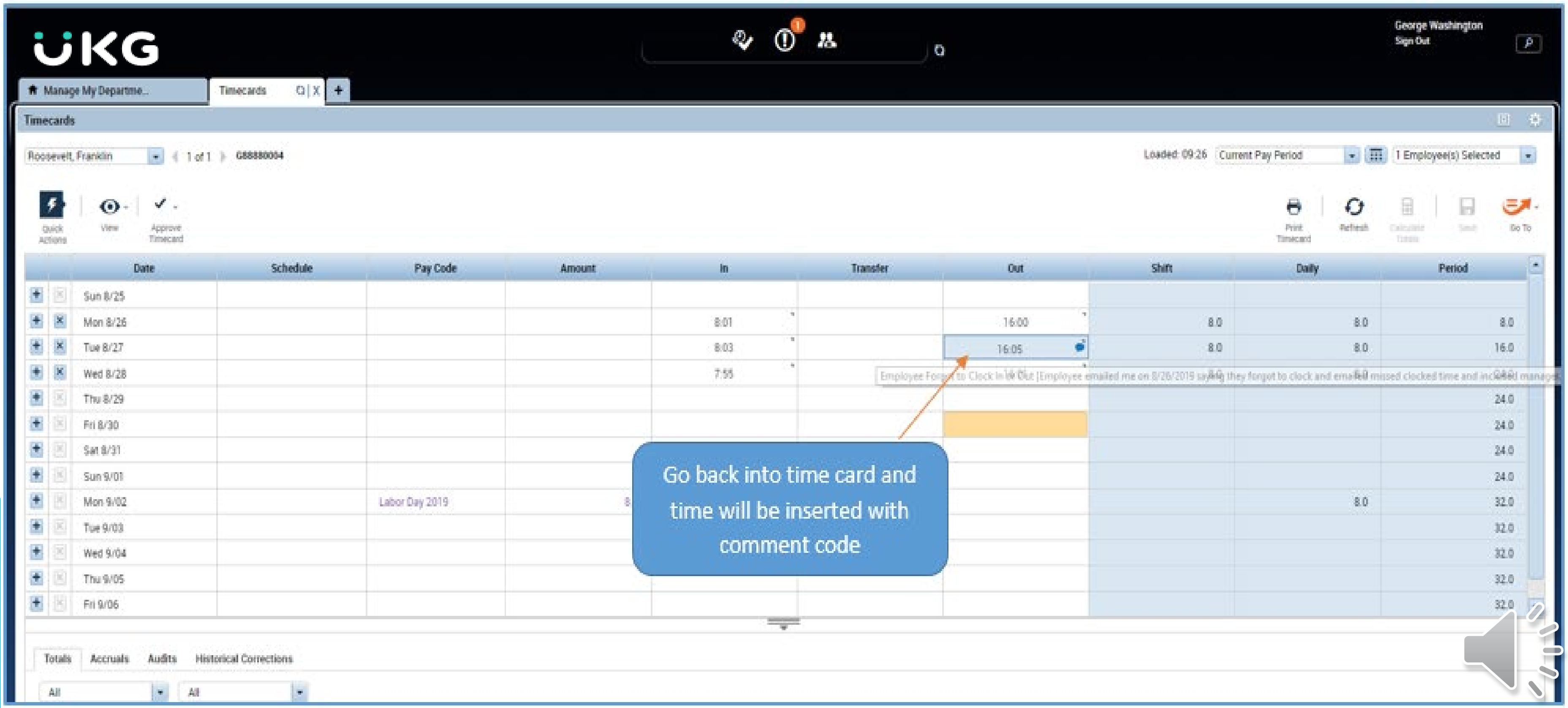
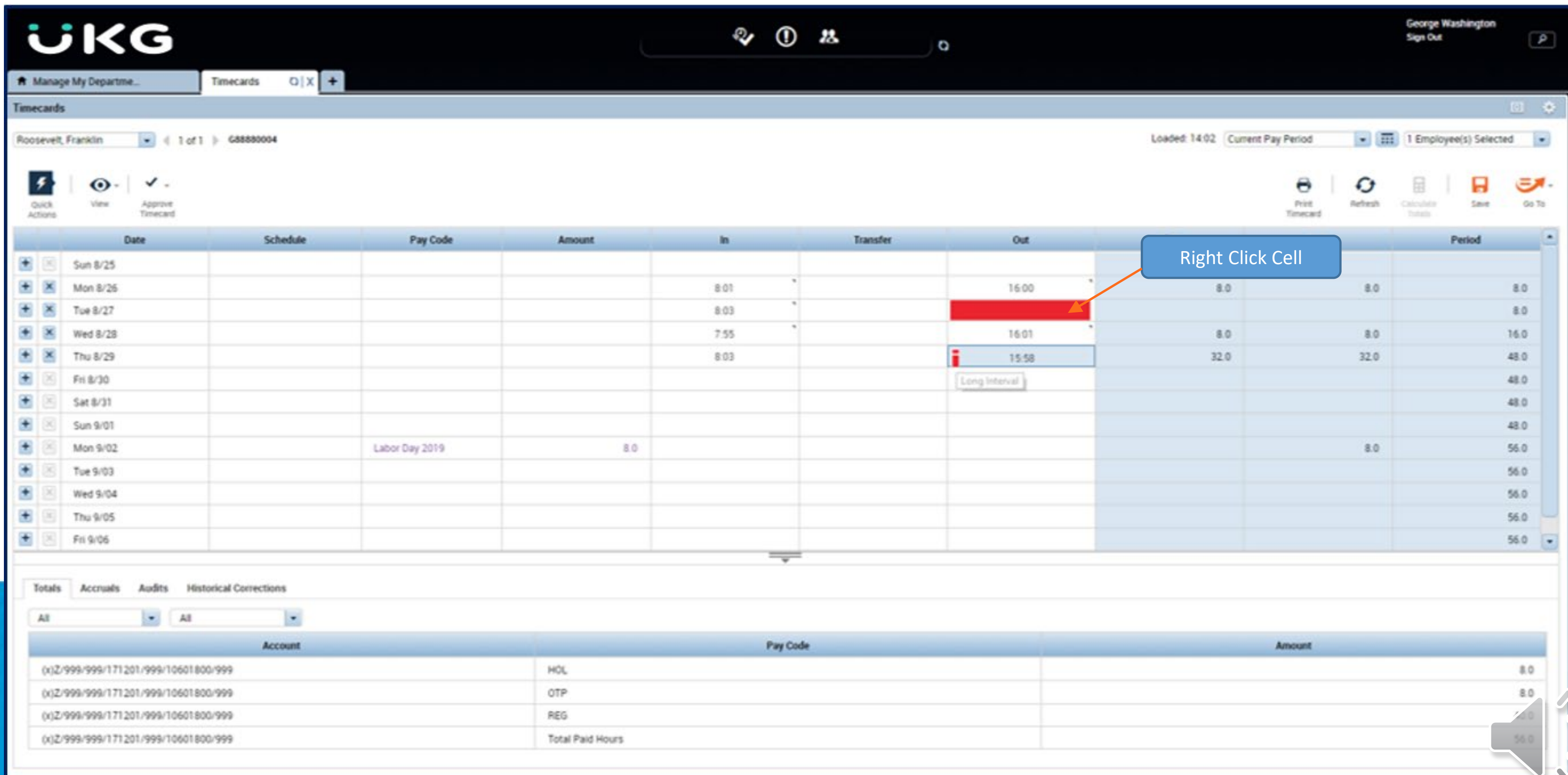
Editing Missed Punch Exceptions from Genie

- Go back to time card and confirm the punch has been added
- Add a comment if one was not added



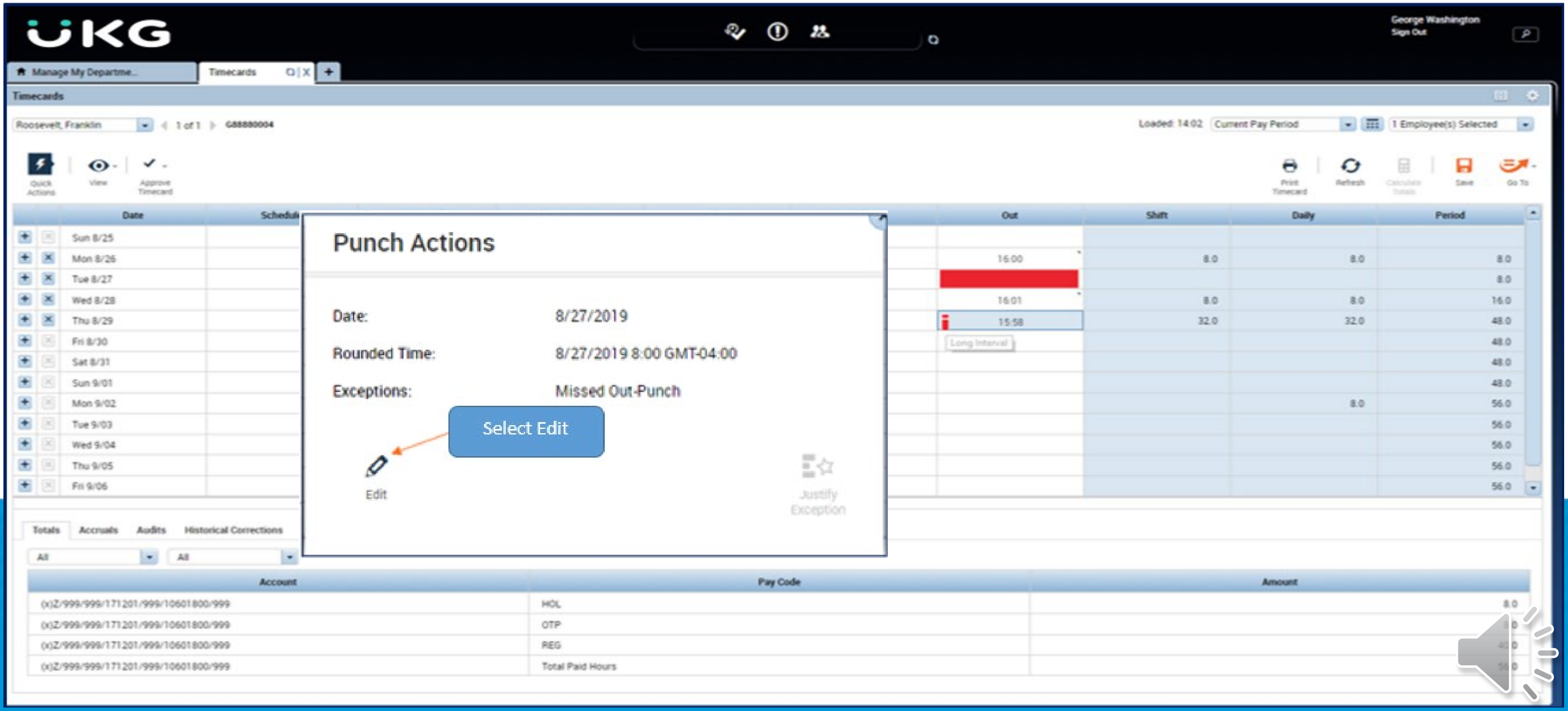
Editing Missed Punch Exceptions from Time Card

- To add missed punch from timecard **Right Click** on missed punch cell



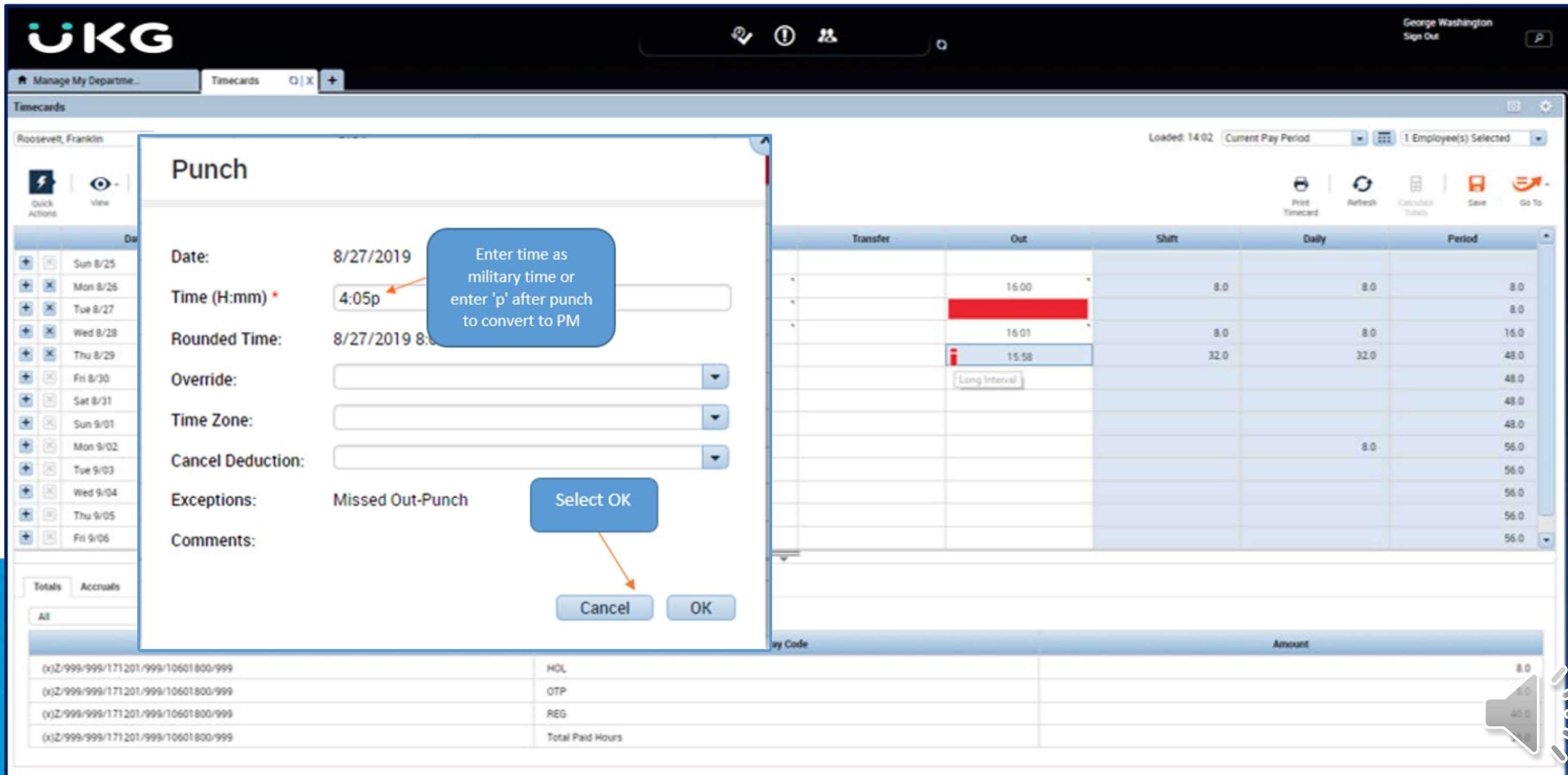
Editing Missed Punch Exceptions from Time Card

- Select **Edit icon** to add punch



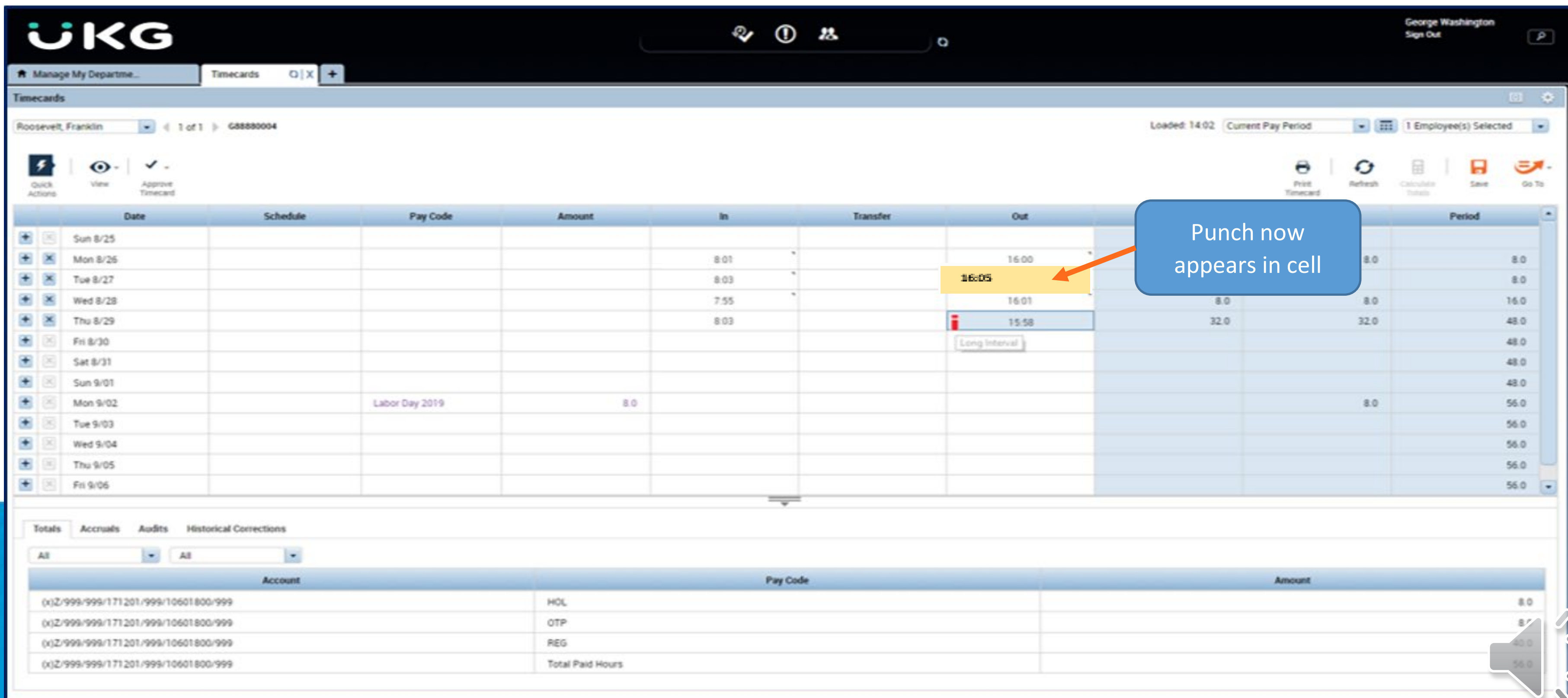
Editing Missed Punch Exceptions from Time Card

- Enter time as military time or enter **'p'** after punch to convert to PM
- Select **OK**



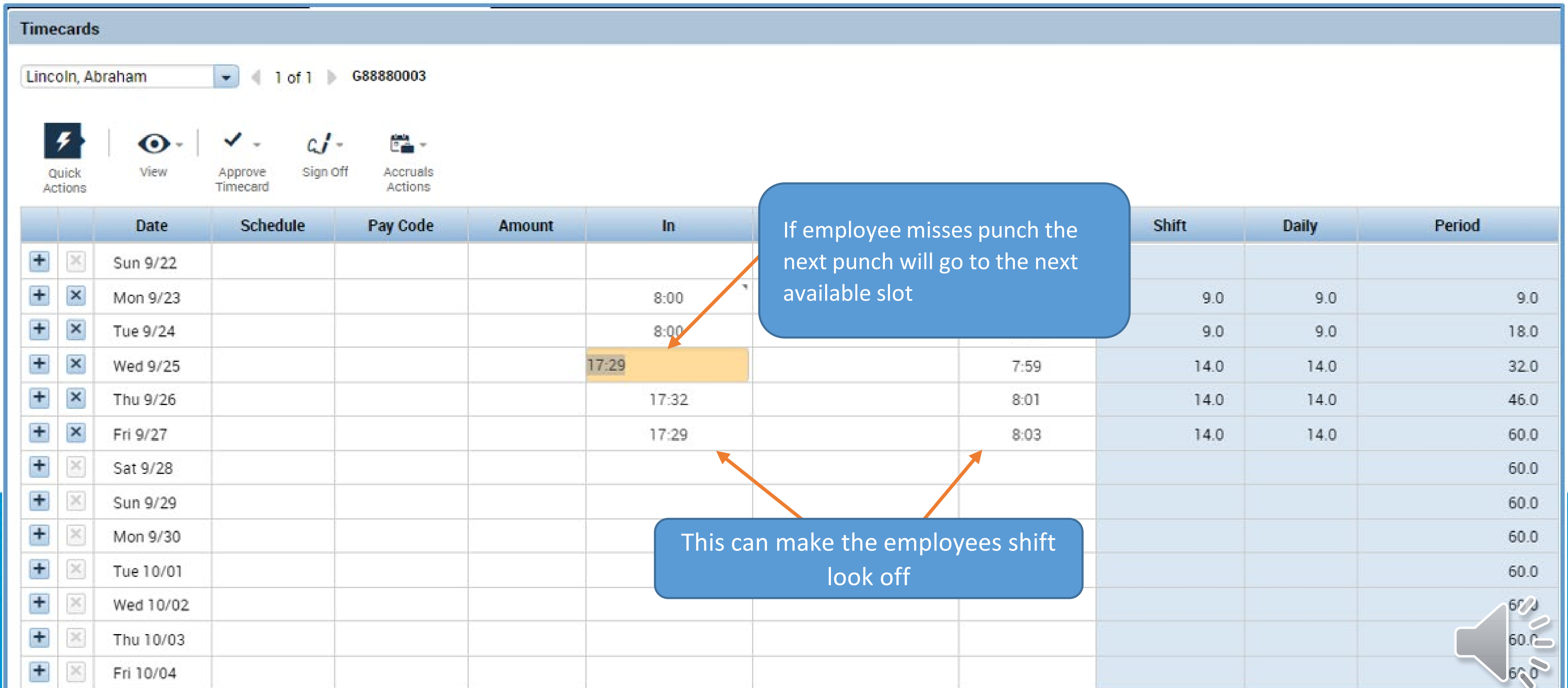
Editing Missed Punch Exceptions from Time Card

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



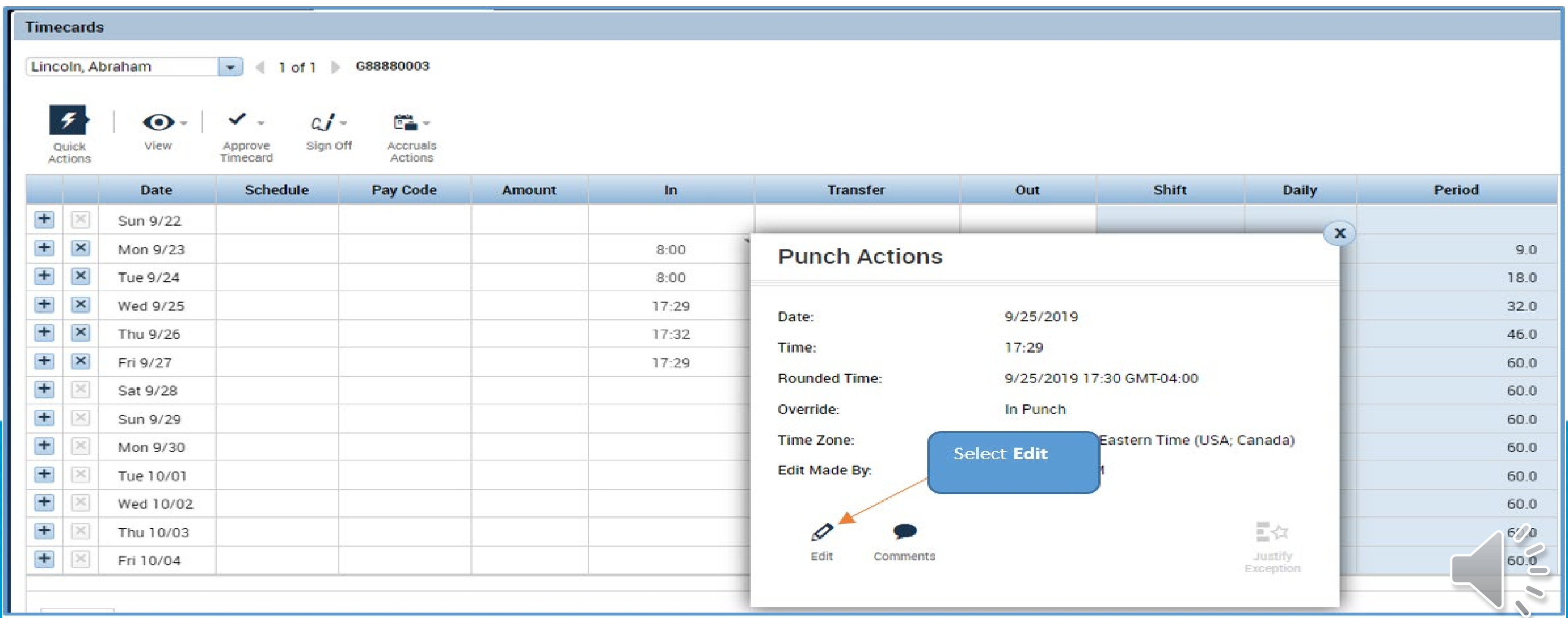
Editing Missed Placed Punch

- 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



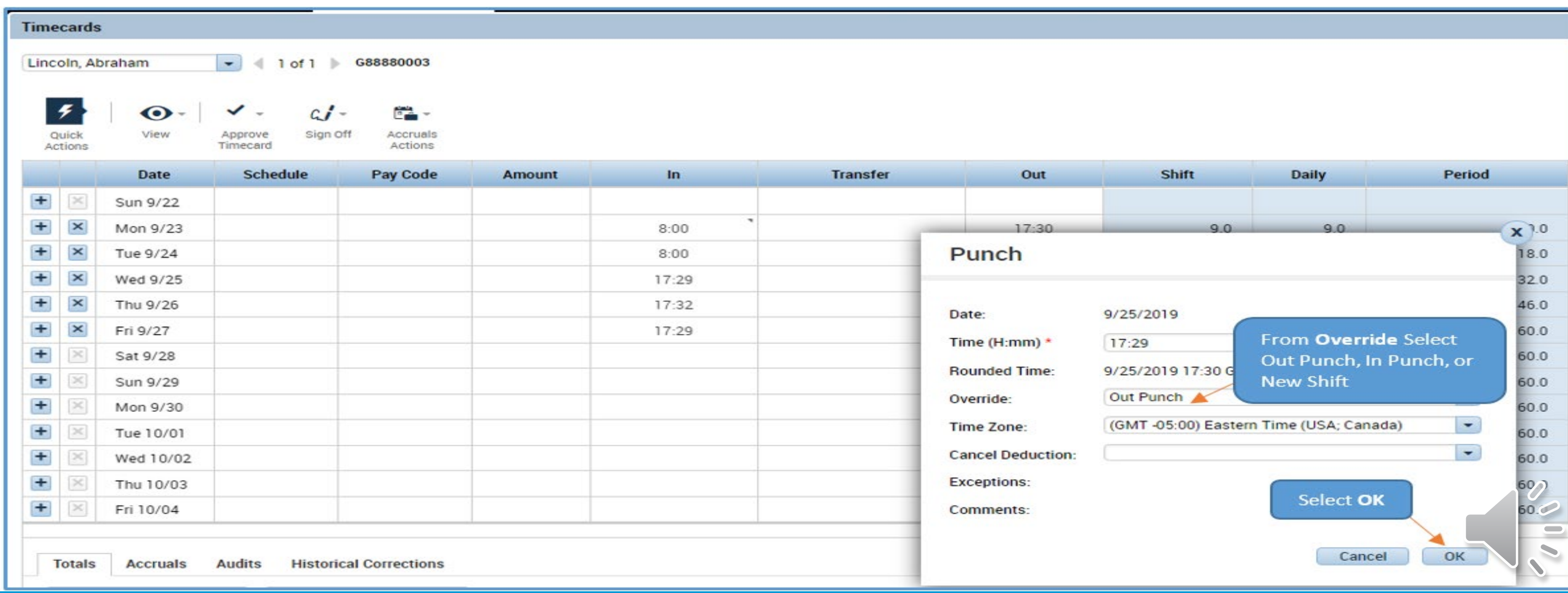
Editing Missed Placed Punch

- 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

Timecards

Lincoln, Abraham | 1 of 1 | G88880003

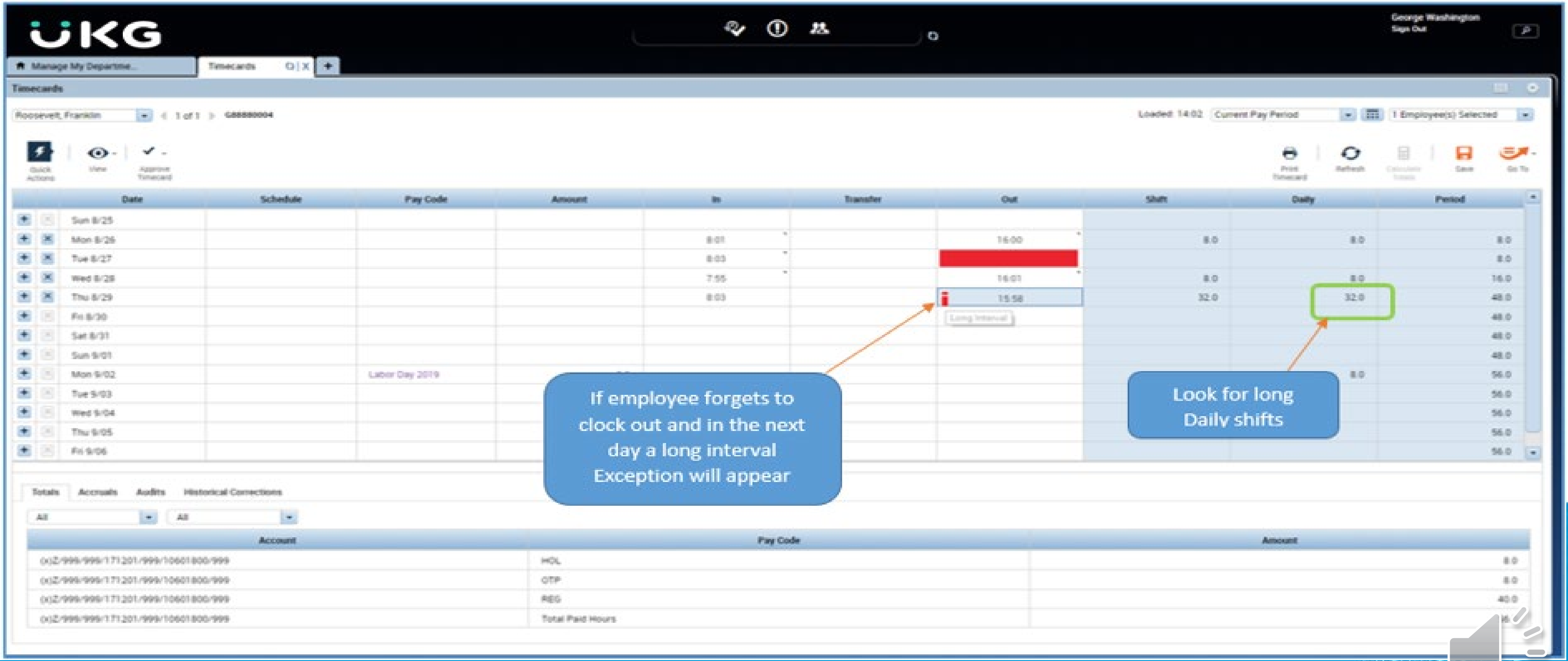
Quick Actions | View | Approve Timecard | Sign Off | Accruals Actions

		Date	Schedule	Pay Code	Amount	In	Transfer	Out	Shift	Daily	Period
+	×	Sun 9/22									
+	×	Mon 9/23				8:00		17:30	9.0	9.0	9.0
+	×	Tue 9/24				8:00		17:33	9.0	9.0	18.0
+	×	Wed 9/25						17:29			18.0
+	×	Thu 9/26				7:59		17:32	9.0	9.0	27.0
+	×	Fri 9/27				8:01		17:29	9.0	9.0	36.0
+	×	Sat 9/28				8:03					36.0
+	×	Sun 9/29									36.0
+	×	Mon 9/30									36.0
+	×	Tue 10/01									36.0
+	×	Wed 10/02									[illegible]
+	×	Thu 10/03									[illegible]
+	×	Fri 10/04									[illegible]

Punches should fall into correct spots leaving a missed punch that the employee missed

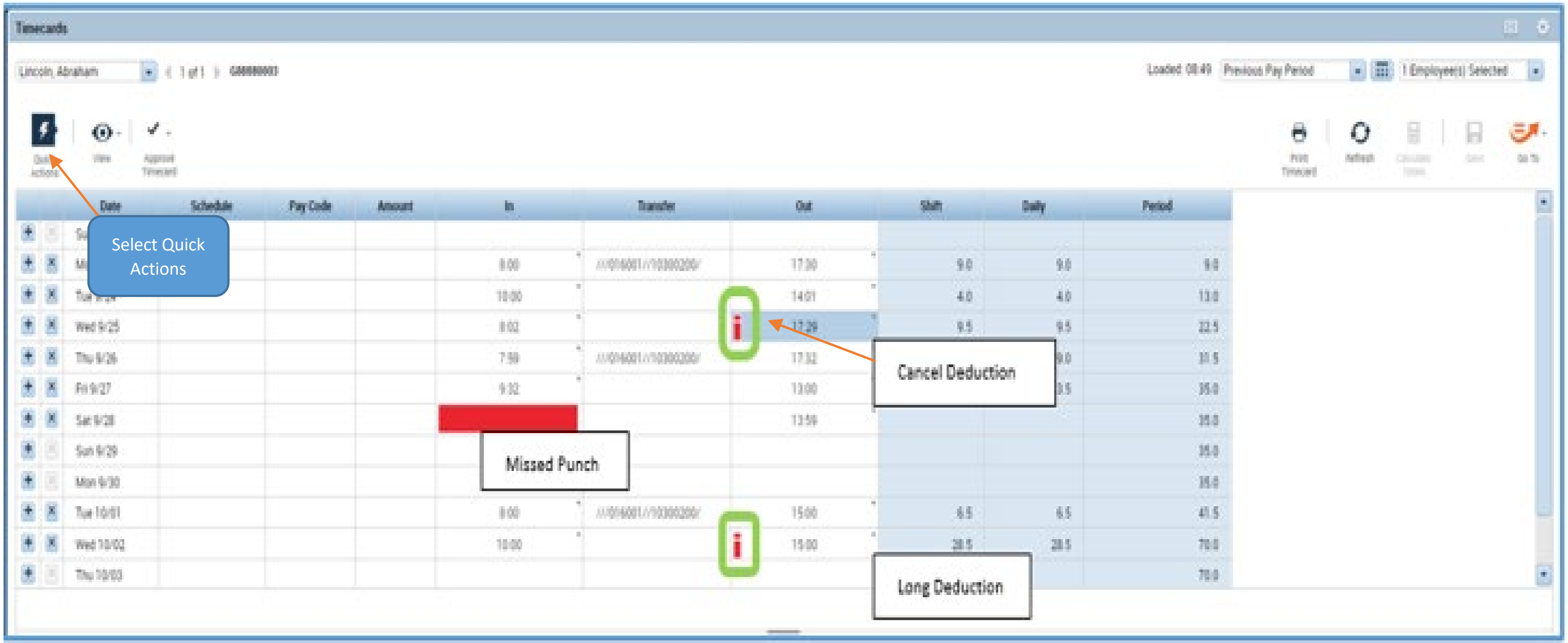
Editing Long Interval Exceptions

- **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.



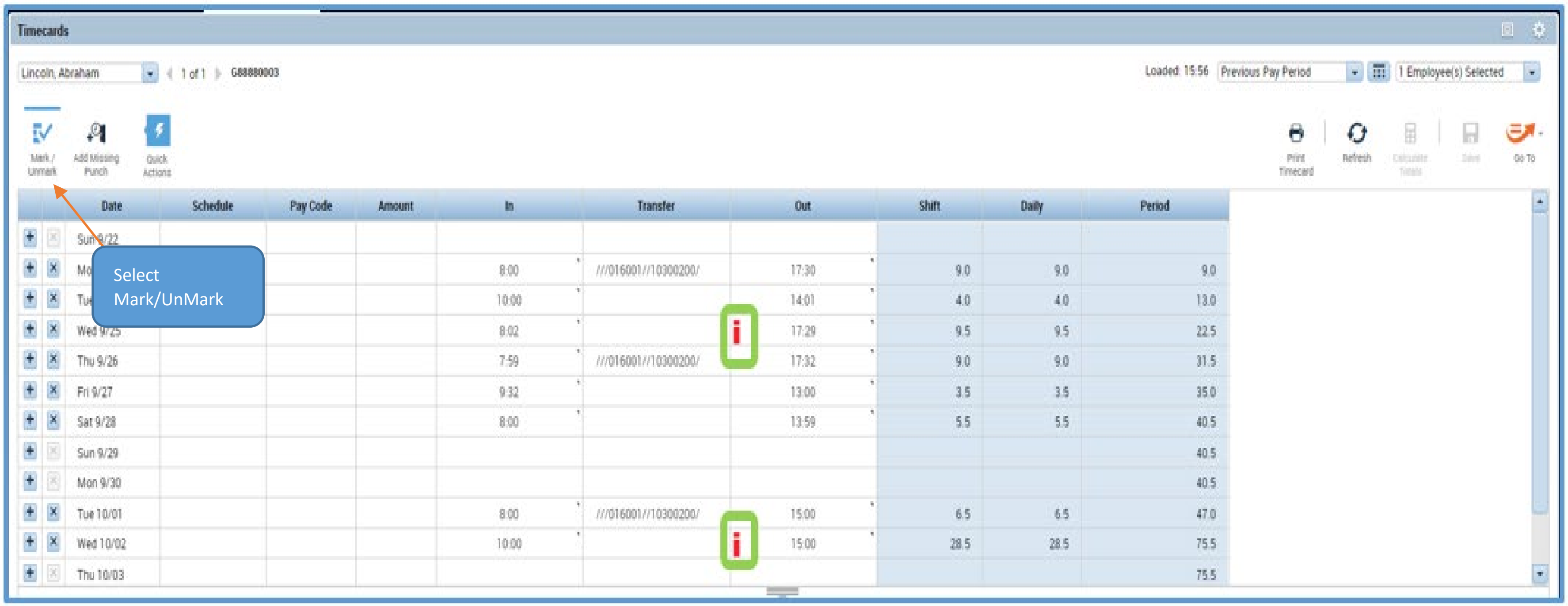
Verifying a Long Interval Exception

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



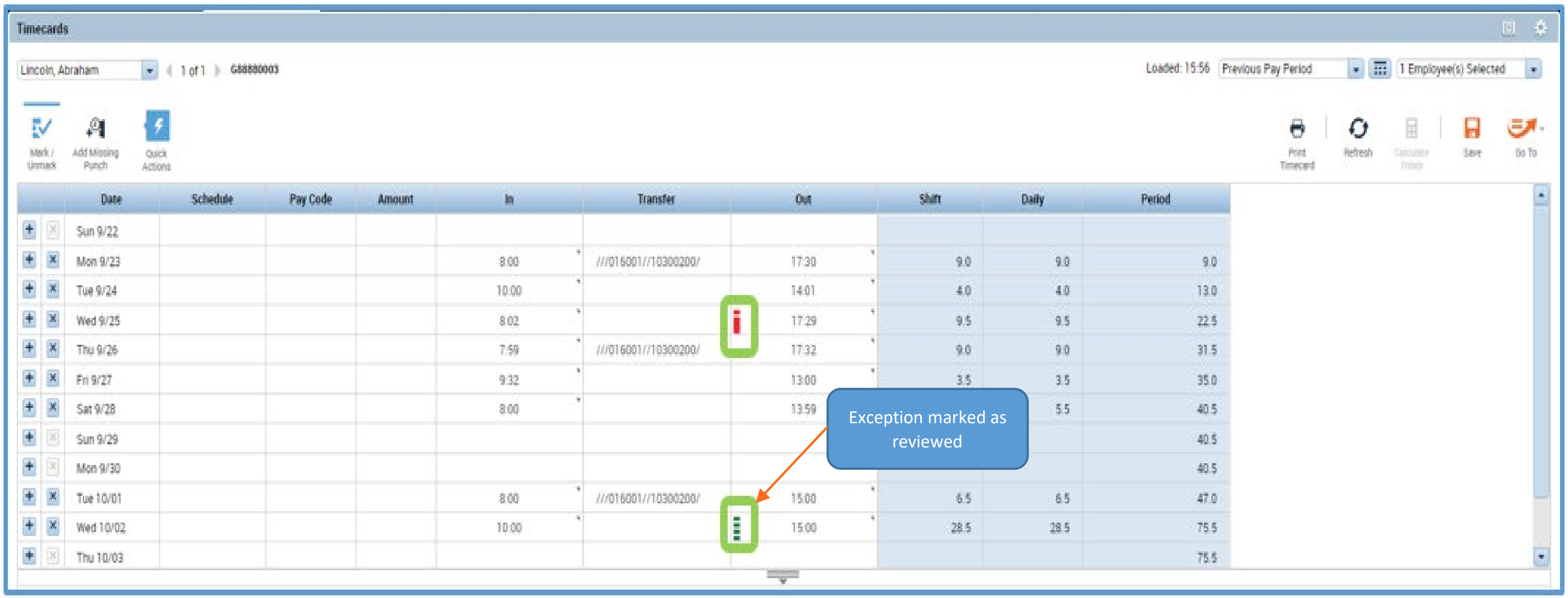
Verifying a Long Interval Exception

- 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

Date	Schedule	Pay Code	Amount	In	Transfer	Out	Shift	Daily	Period
Sun 9/22									
Mon 9/23				8:00	001//10300200/	17:30	9.0	9.0	9.0
Tue 9/24				10:00		14:01	4.0	4.0	13.0
Wed 9/25				8:02		17:29	9.0	9.0	22.0
Thu 9/26				7:59	///016001//10300200/	17:32	9.0	9.0	31.0
Fri 9/27				9:32		13:00	3.5	3.5	34.5
Sat 9/28				10:00		13:59	4.0	4.0	38.5
Sun 9/29									38.5
Mon 9/30									38.5
Tue 10/01				8:00	///016001//10300200/	15:00	6.5	6.5	45.0
Wed 10/02				10:00		14:31	4.5	4.5	49.5
Thu 10/03									49.5
Fri 10/04									49.5

Right Click on cell

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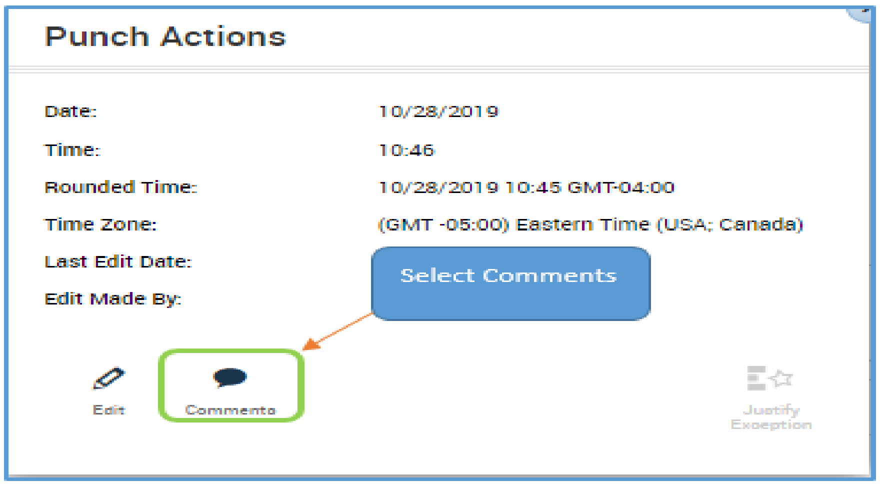
Adding Comments

- Select comment icon



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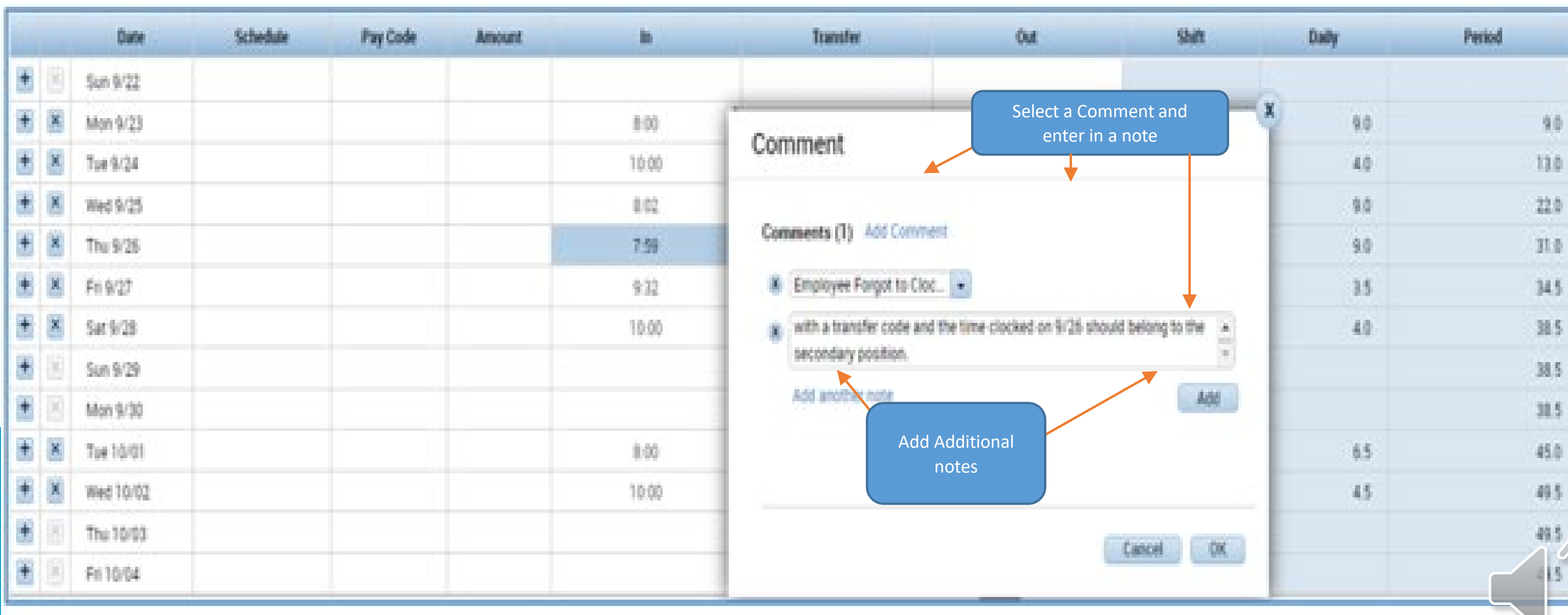
Adding Comments

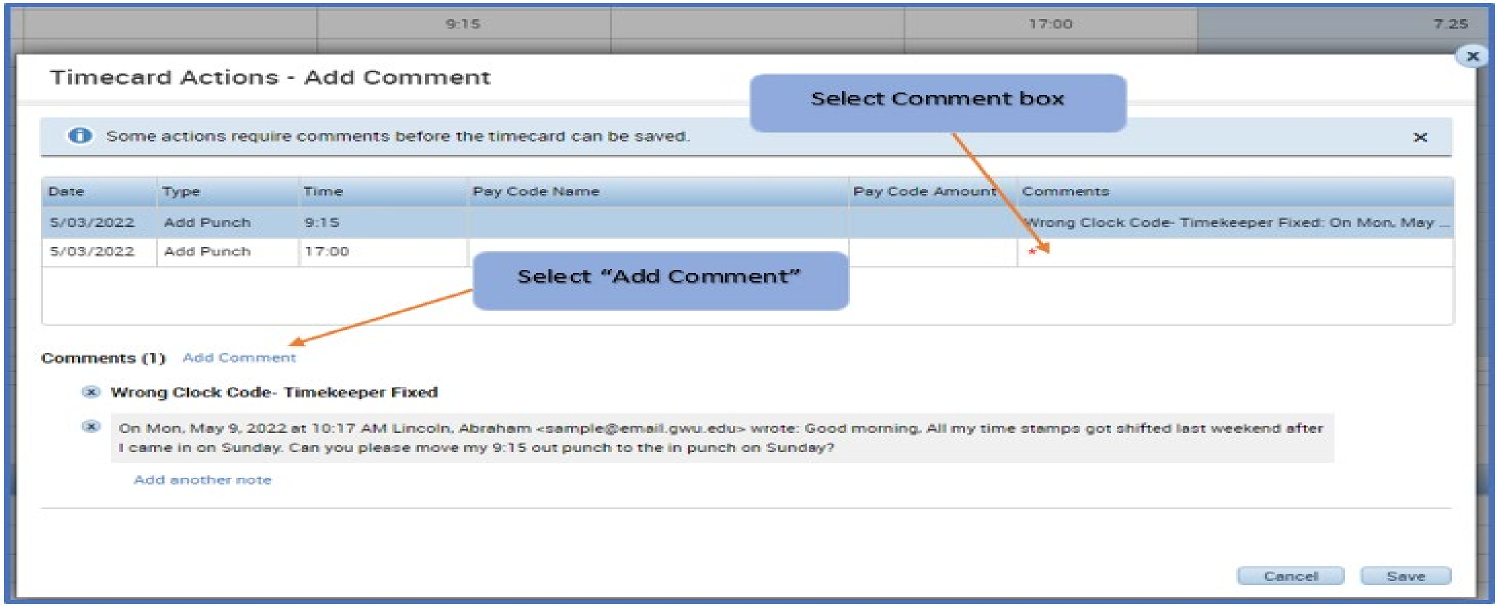
- Select your comment
- Add a note
- Select **OK**
- The comment feature will allow you to add on additional comments and additional notes



Required Comments

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



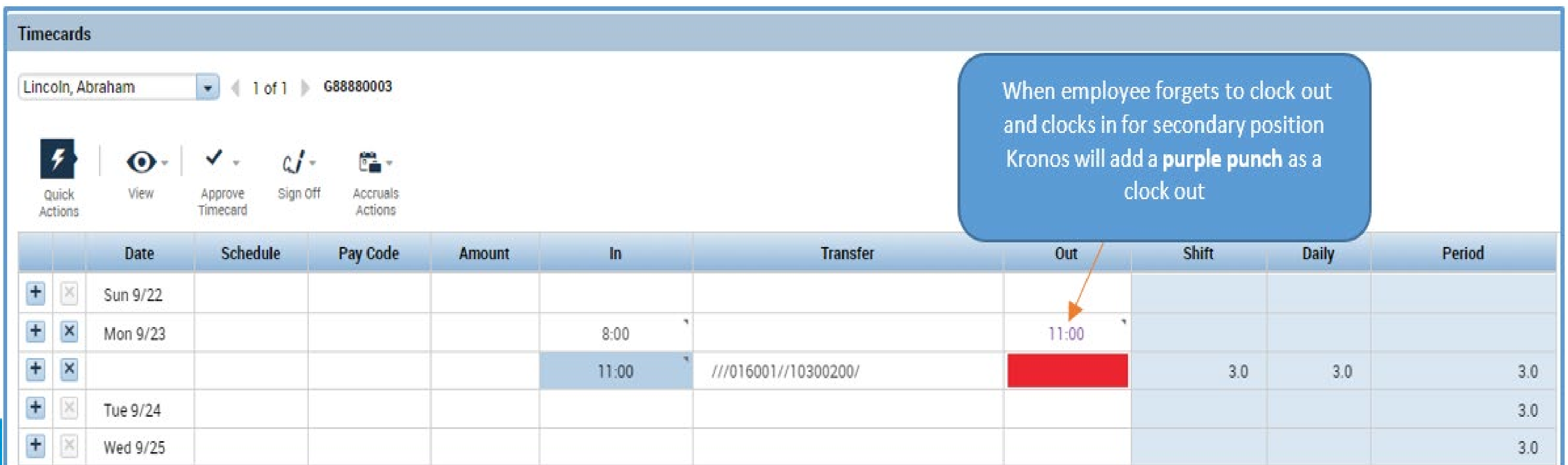
Required Comment Tips

- 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

TRS Generated Punch (Phantom 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.



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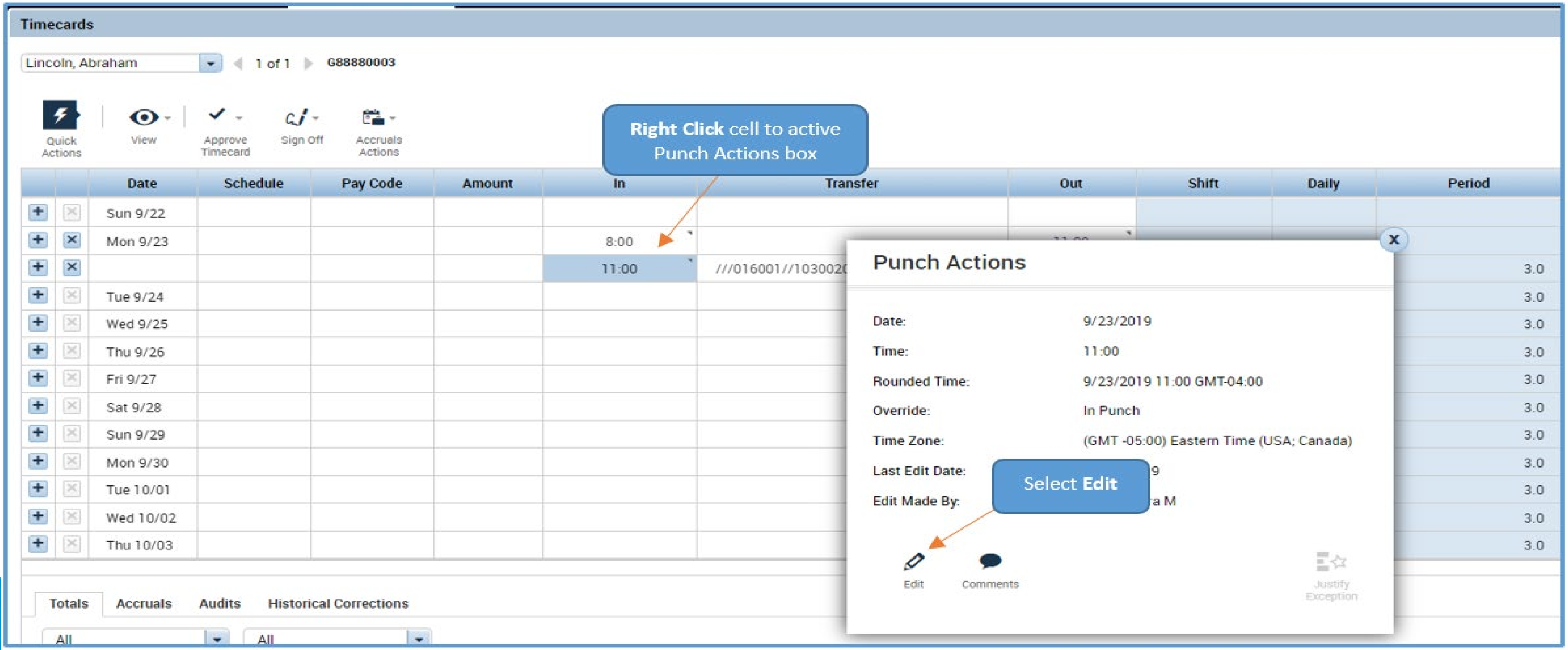
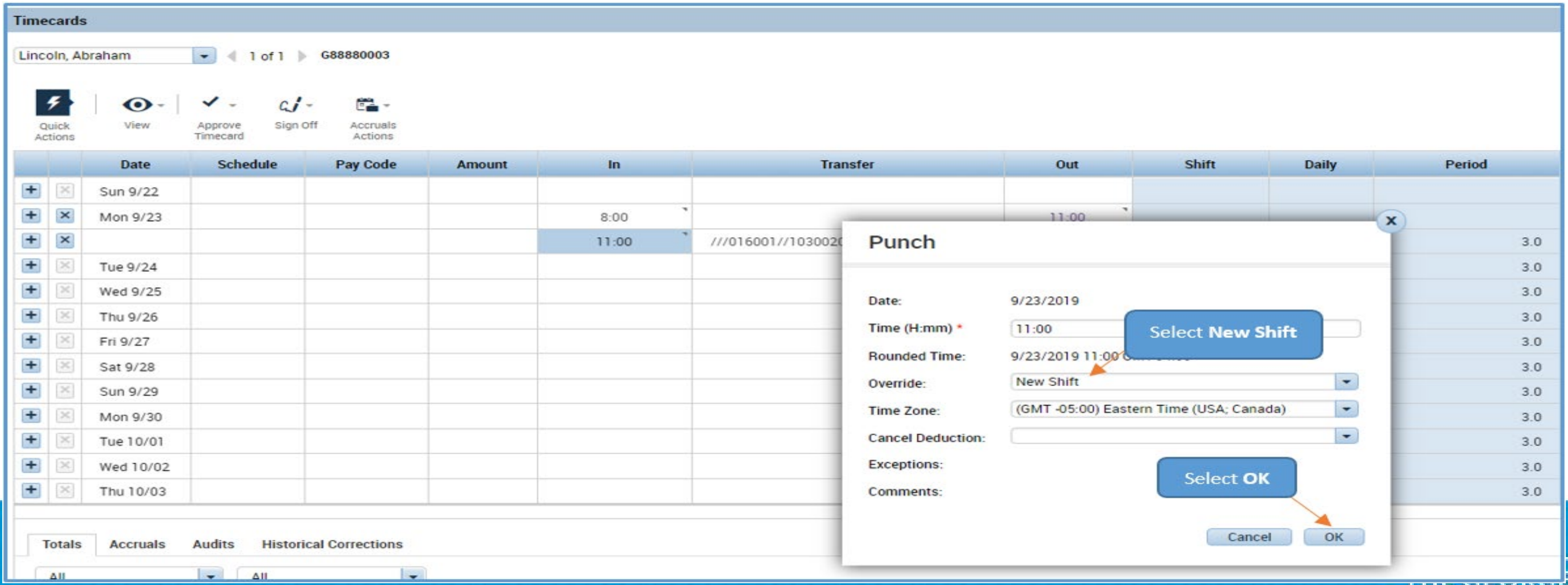
TRS Generated Punch (Phantom Punch)

- **Right click** cell to activate Punch Actions box
- Select **Edit**



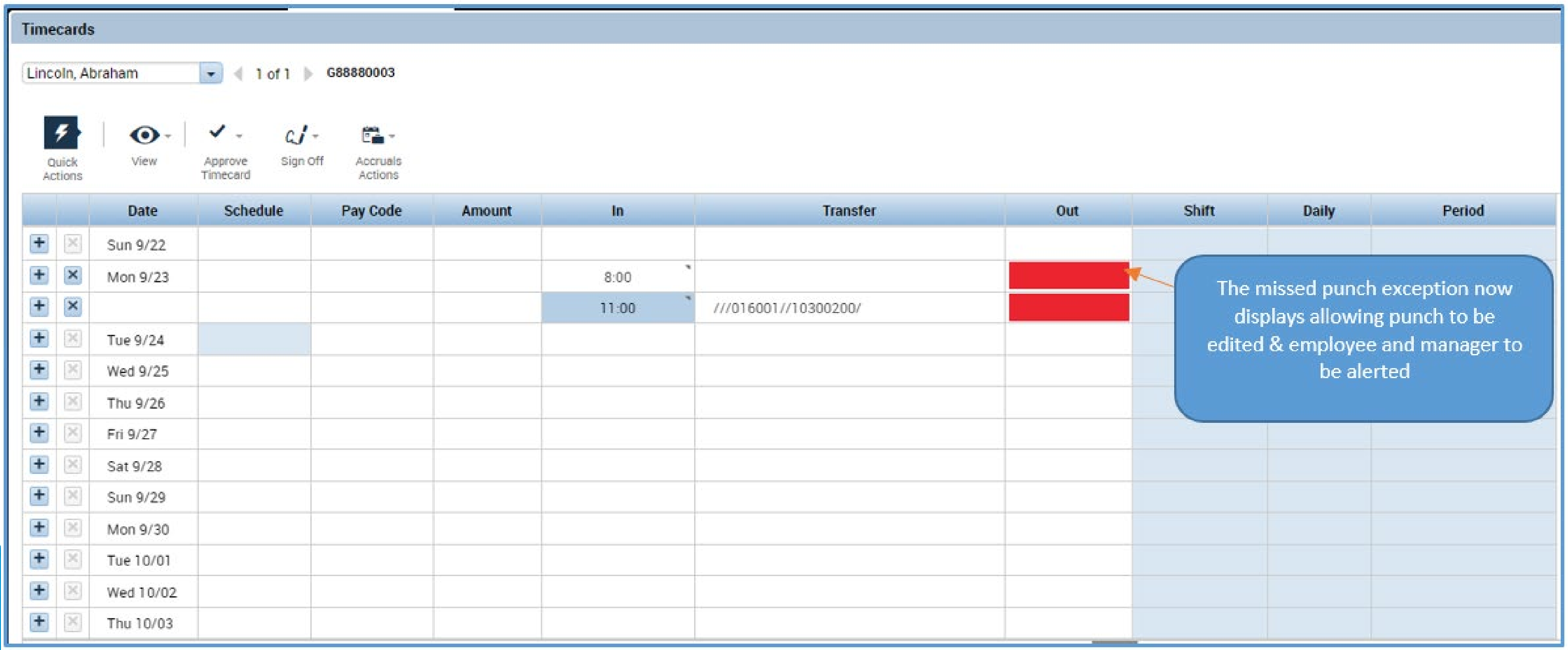
TRS Generated Punch (Phantom Punch)

- 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



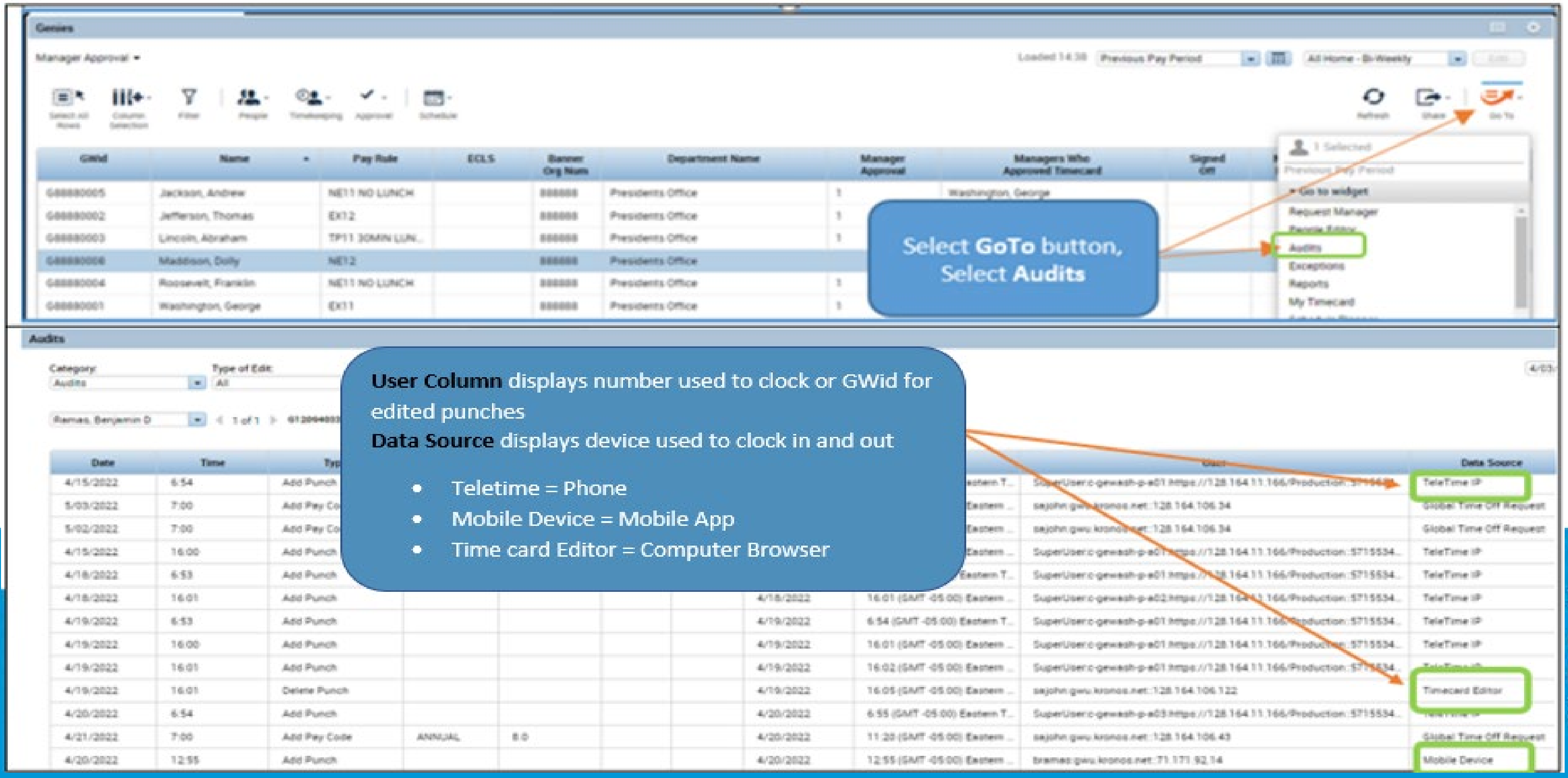
System Generated Notifications

- **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

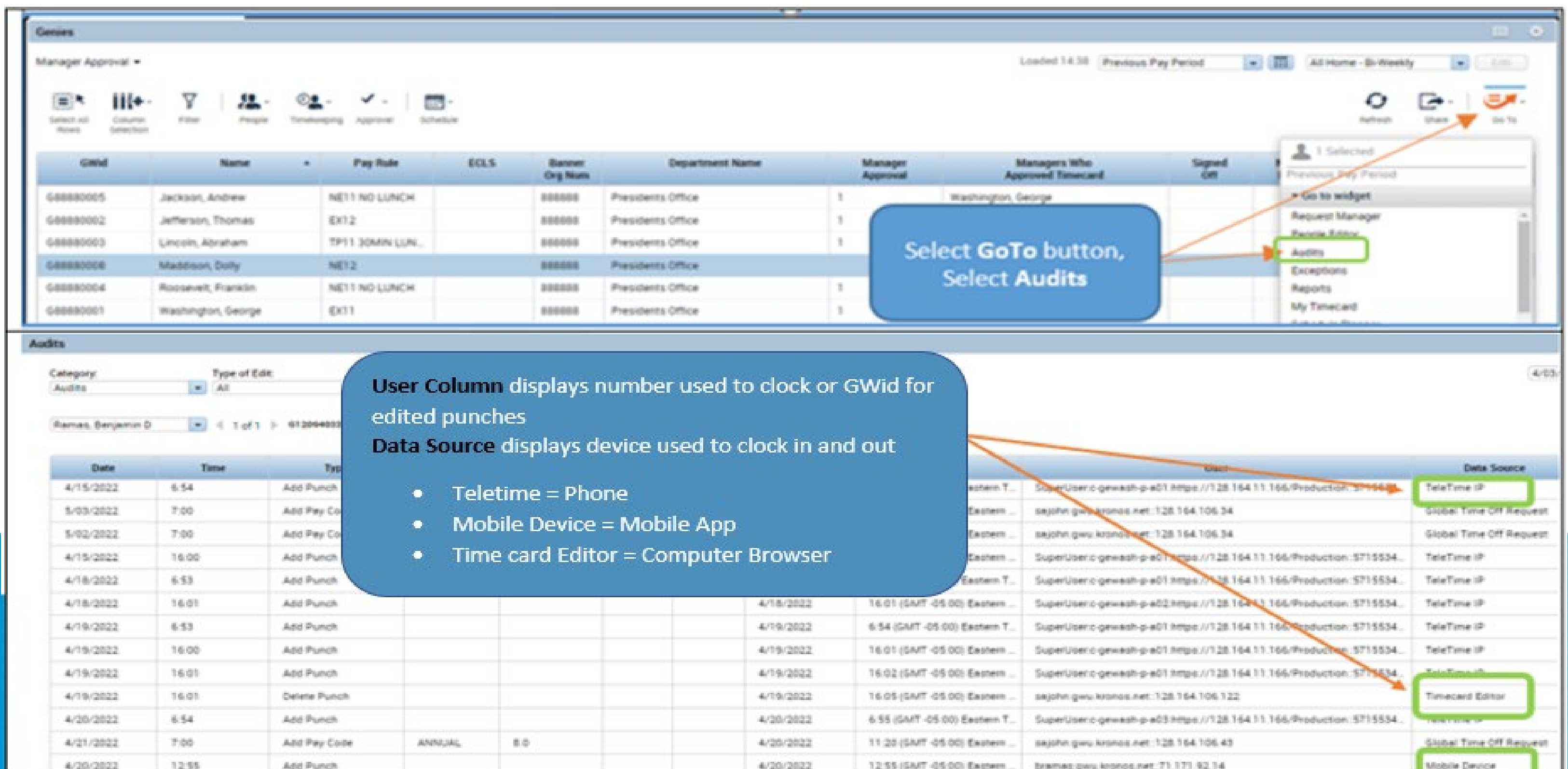
Audits

- 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
- 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

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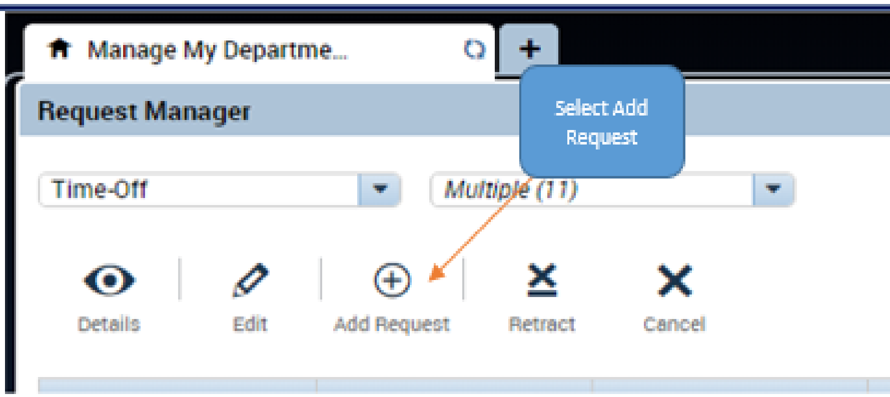
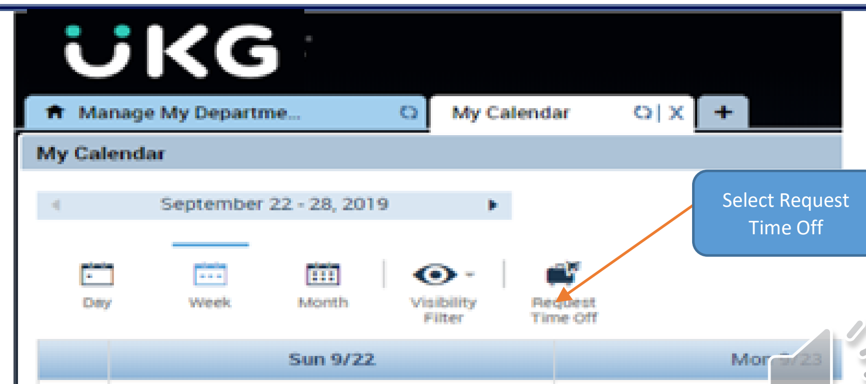
Time Off

- 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 Managers may request time off on behalf of the employee by selecting the **Add Request** button from the Request Manager

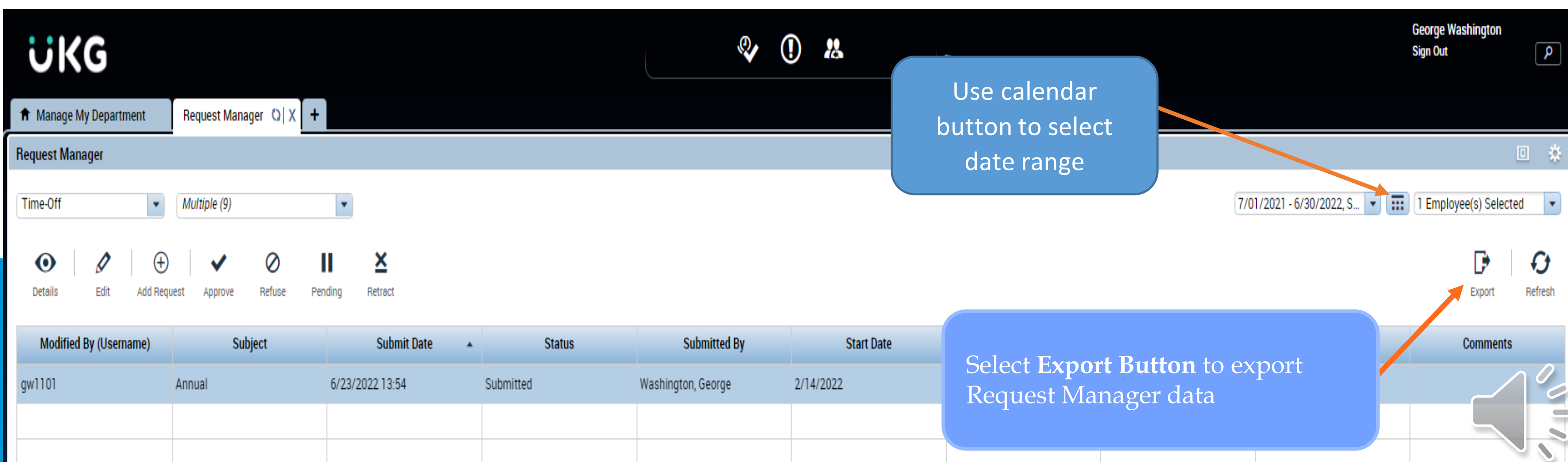


Employees request Leave from My Calendar by selecting the **Request Time Off** button



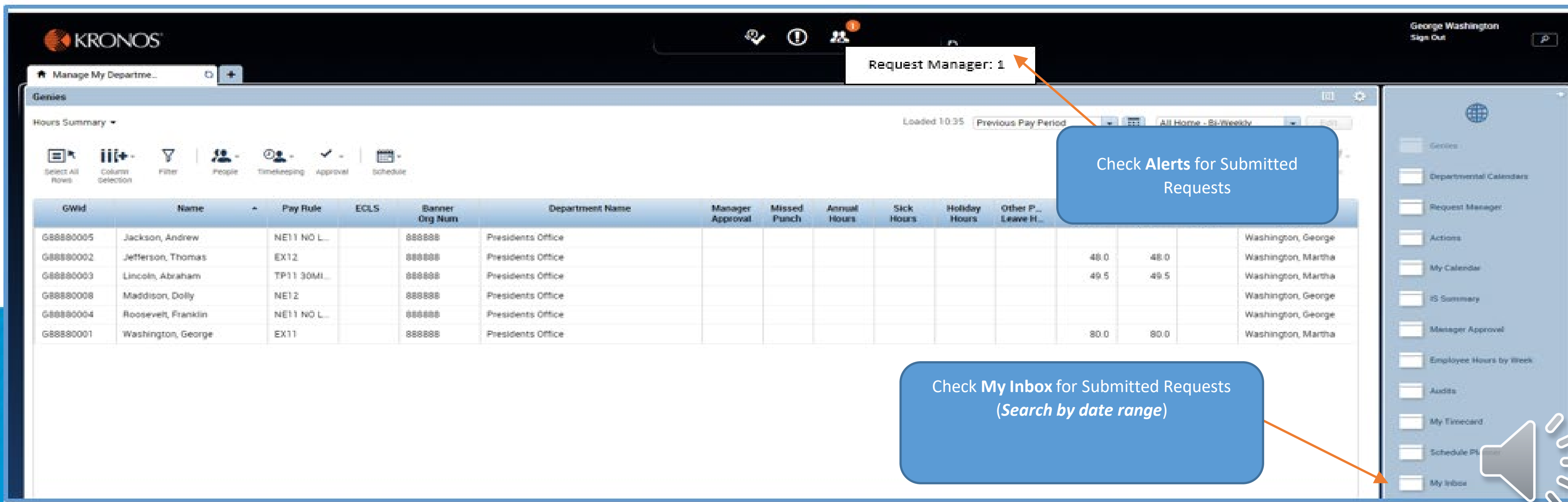
Time Off

- 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
- Use **Calendar button** to select date range of request
- Select the **Export Button** to export Request Manager data



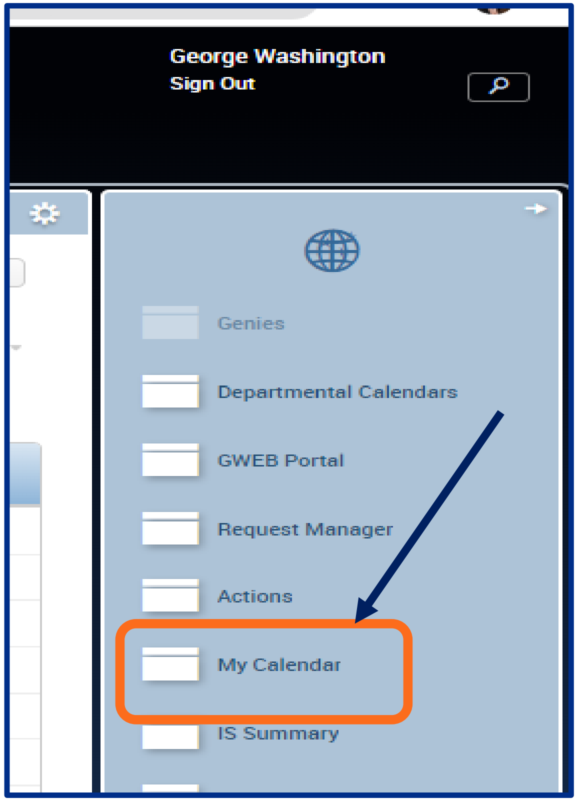
Check Time Off Requests

- 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**



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



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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 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)***

Editing Holiday Hours for Non-Exempt Part-Time Employees

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:

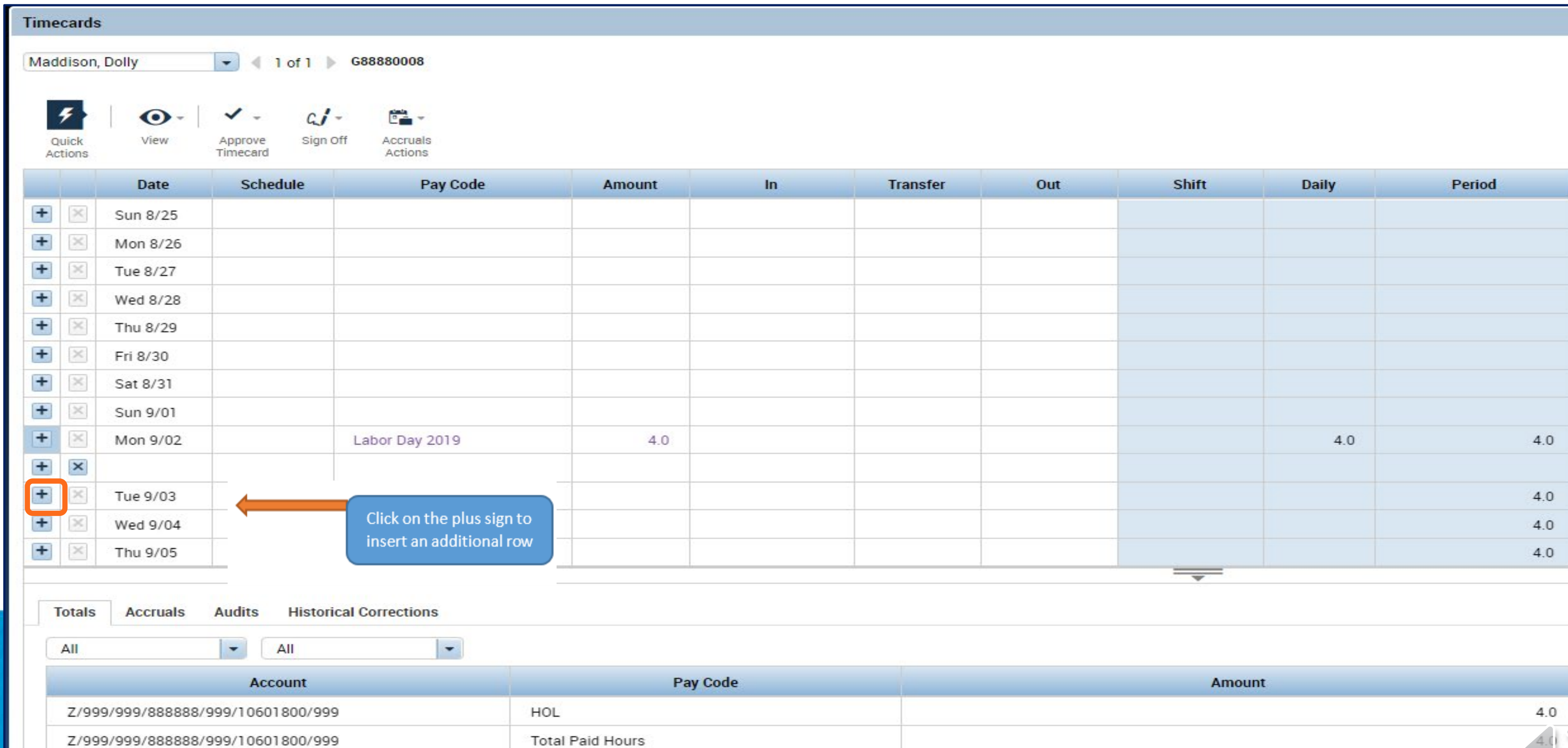
Scheduled Work Hours	Holiday Proration Hours
36	7.20
30	6.00
24	4.80
16	3.20

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

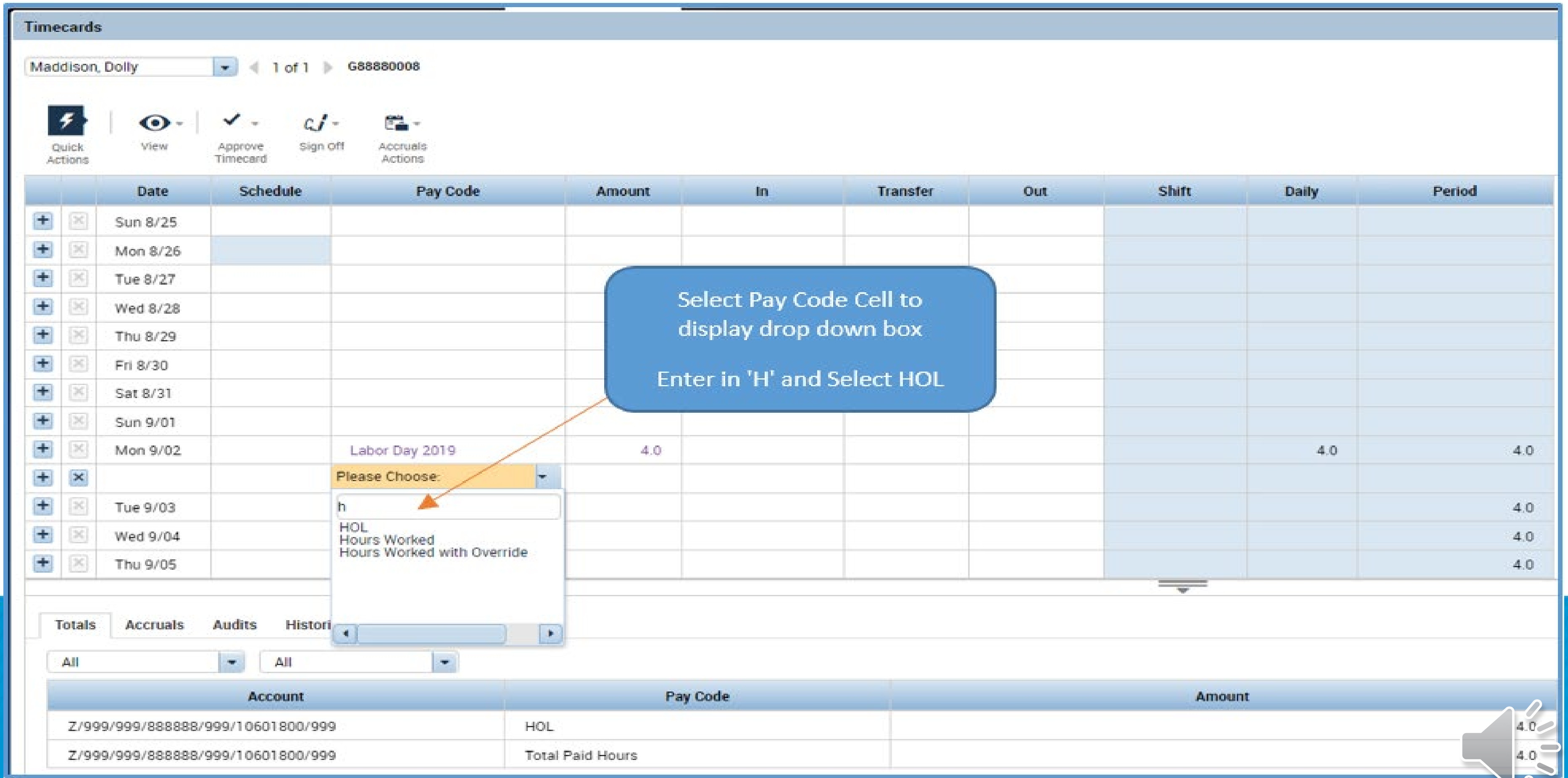
Editing Holiday Hours for Non-Exempt Part-Time Employees

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



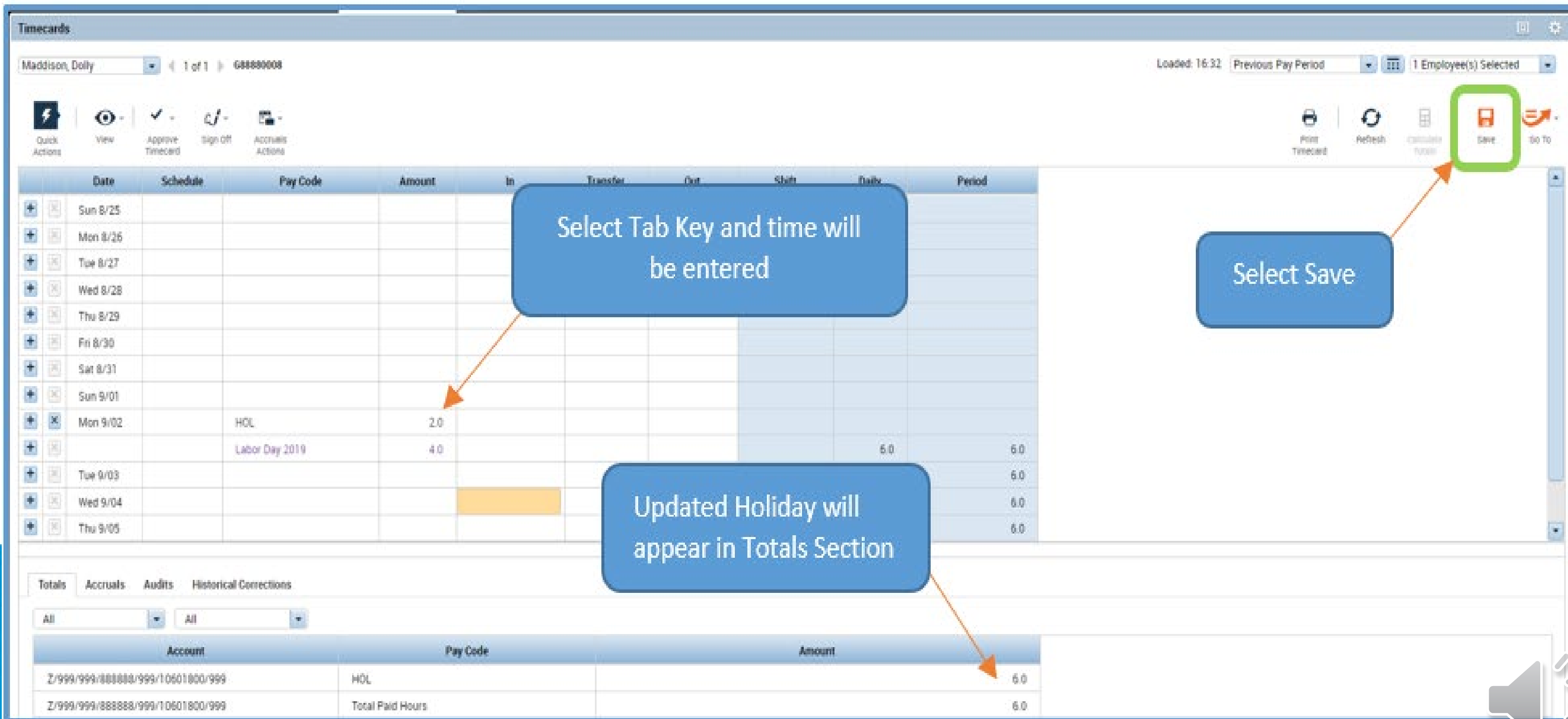
Editing Holiday Hours for Non-Exempt Part-Time Employees

- On the new blank line select the pay code cell to display a drop down box
- Enter in '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.

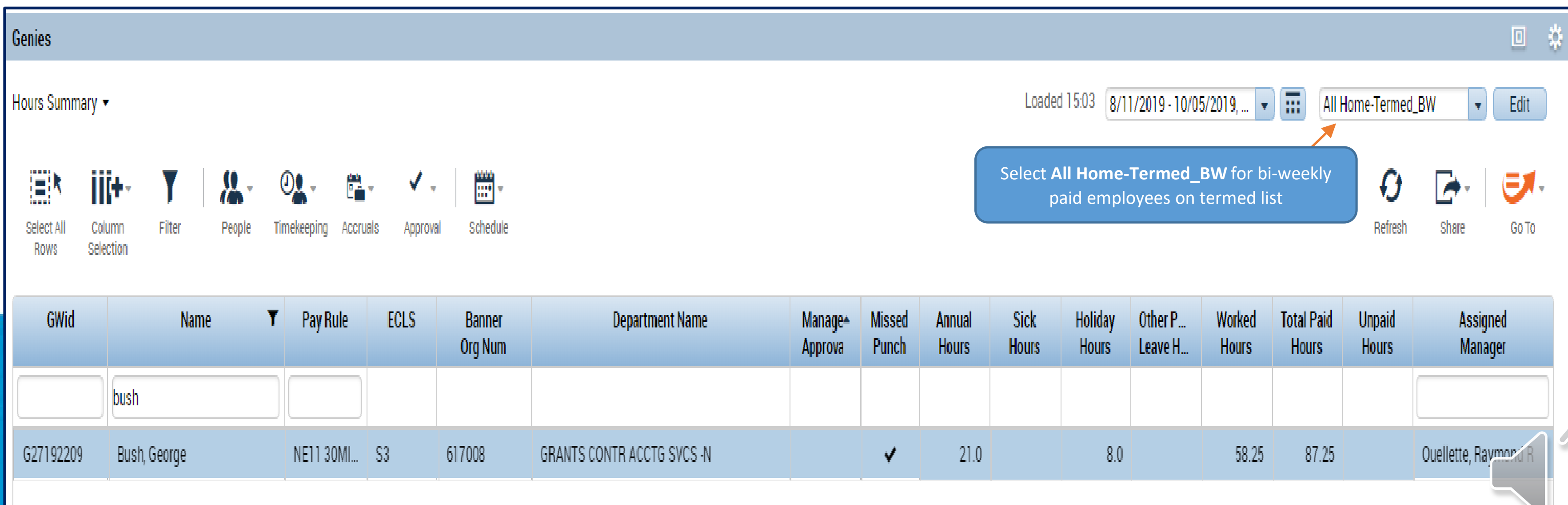
The employee and their manager are responsible for tracking and coordinating the substitute day off.

- 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

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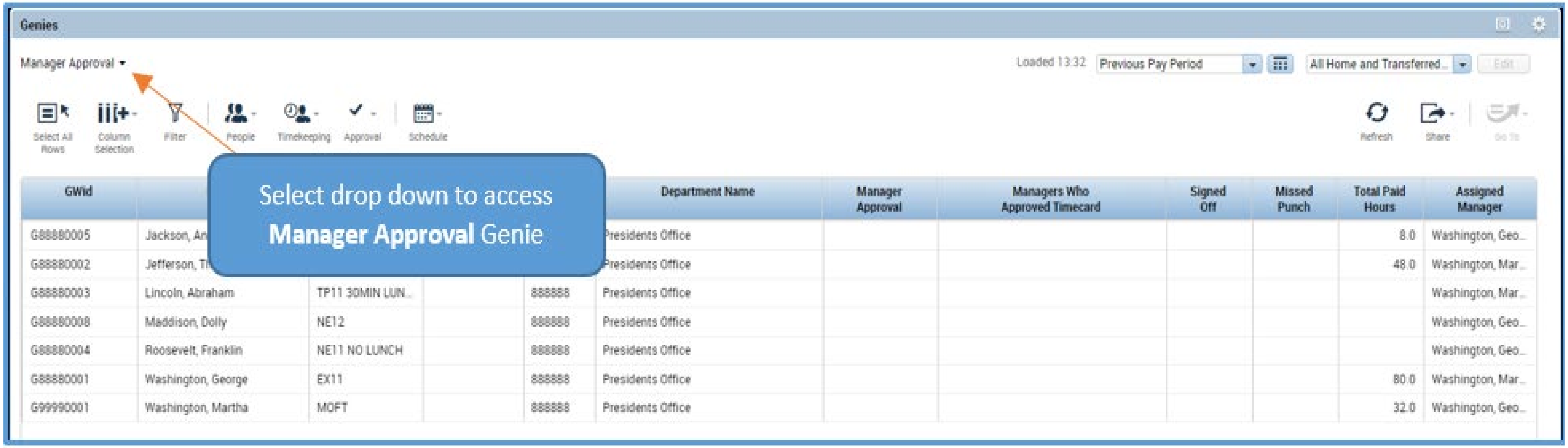
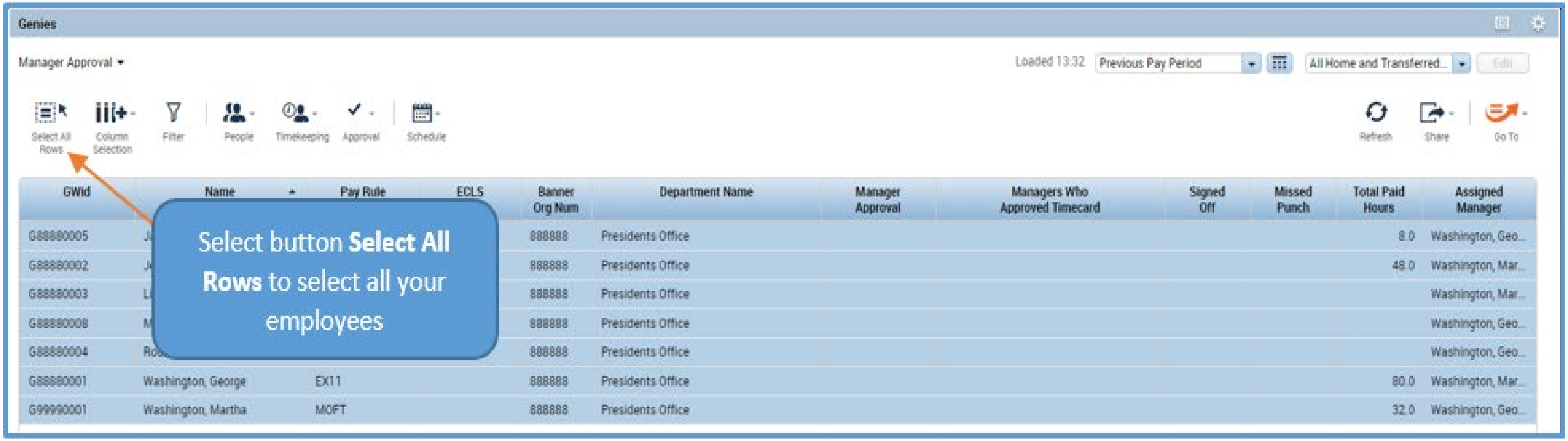
Approving Employees from Genie

- It is recommended to approve from the **Manager Approval** Genie



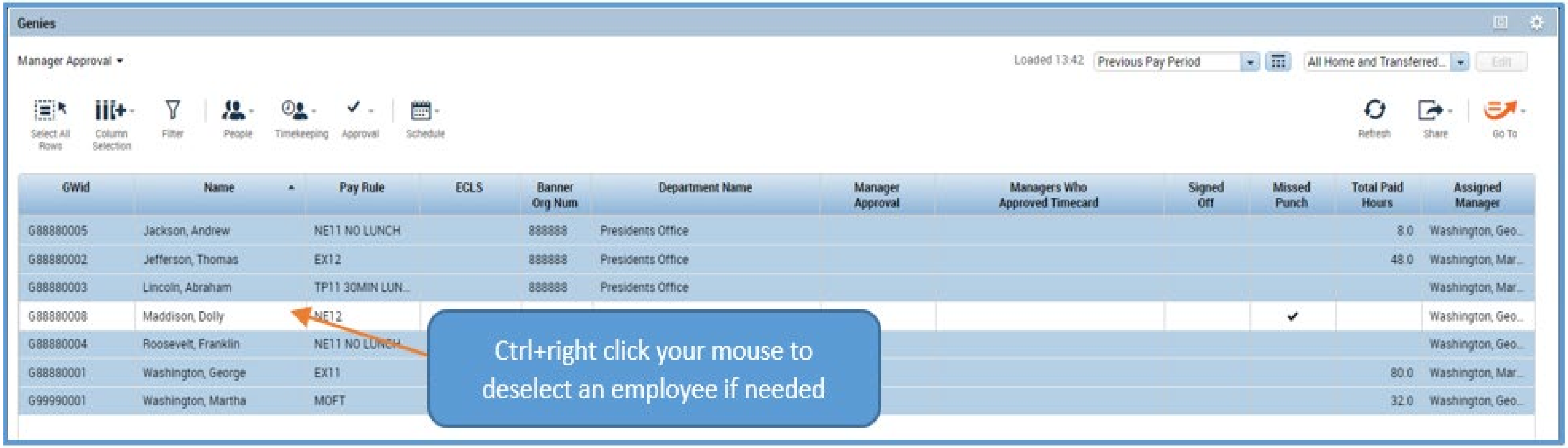
Approving Employees from Genie

- The **Select All Rows** button will select all your employees



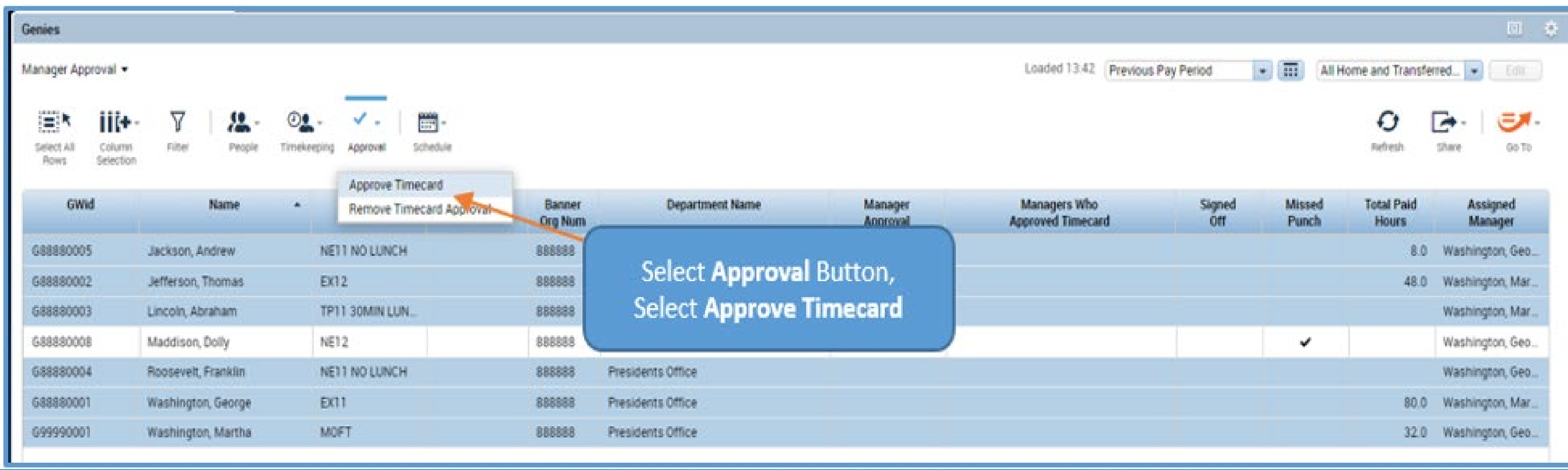
Approving Employees from Genie

- **Ctrl + right click** your mouse to deselect an employee if needed



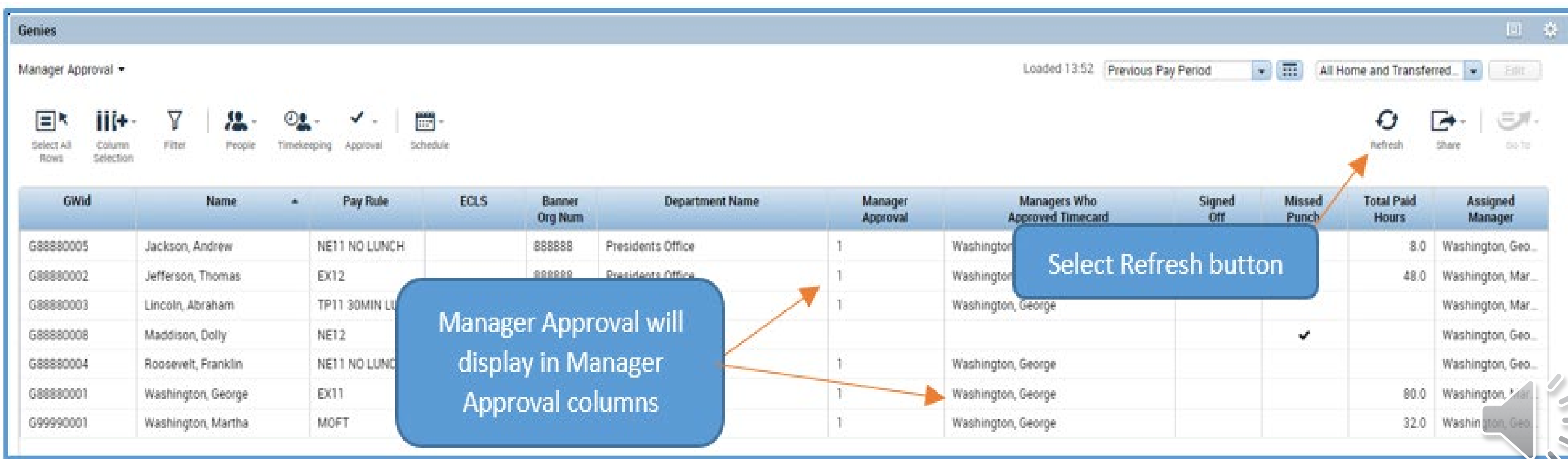
Approving Employees from Genie

- Select **Approval** Button
- Select **Approve Timecard**



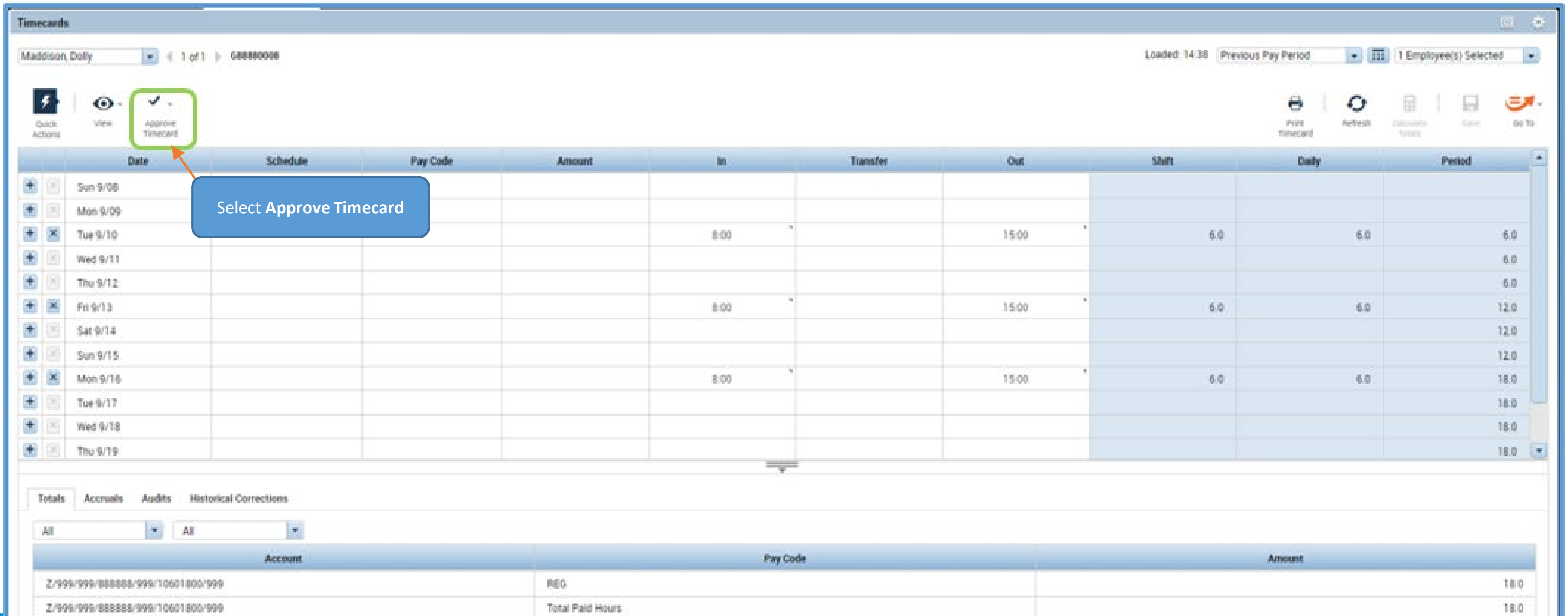
Confirming Approval

- 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



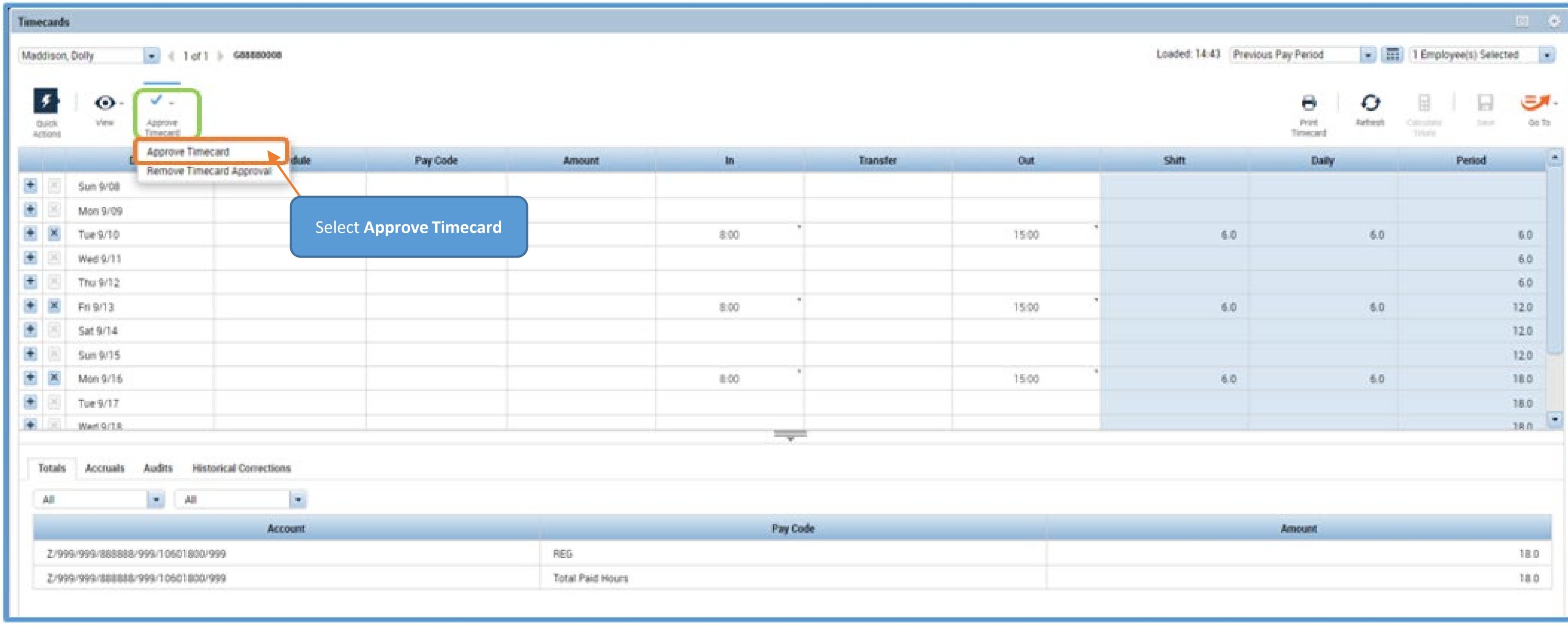
Approving from the Timecard

- Open up Timecard
- Select **Approve Timecard** button



Approving from the Timecard

- Select **Approve Timecard**



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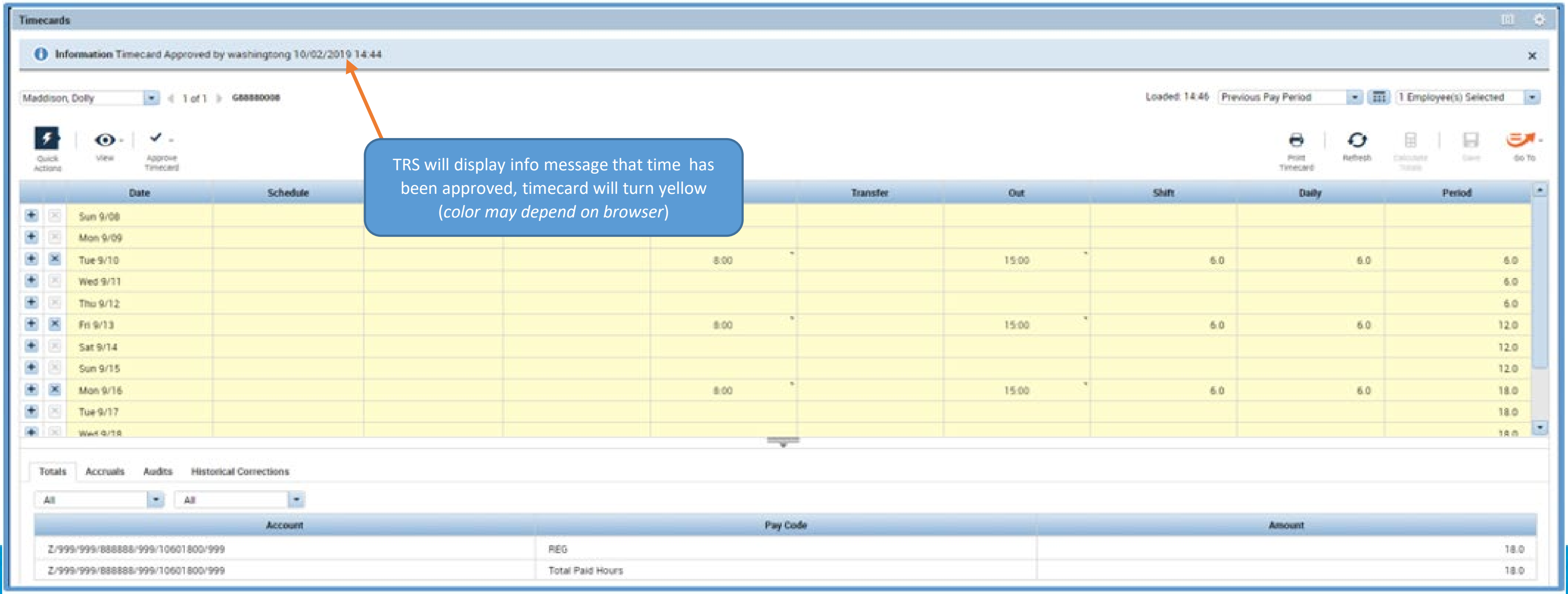
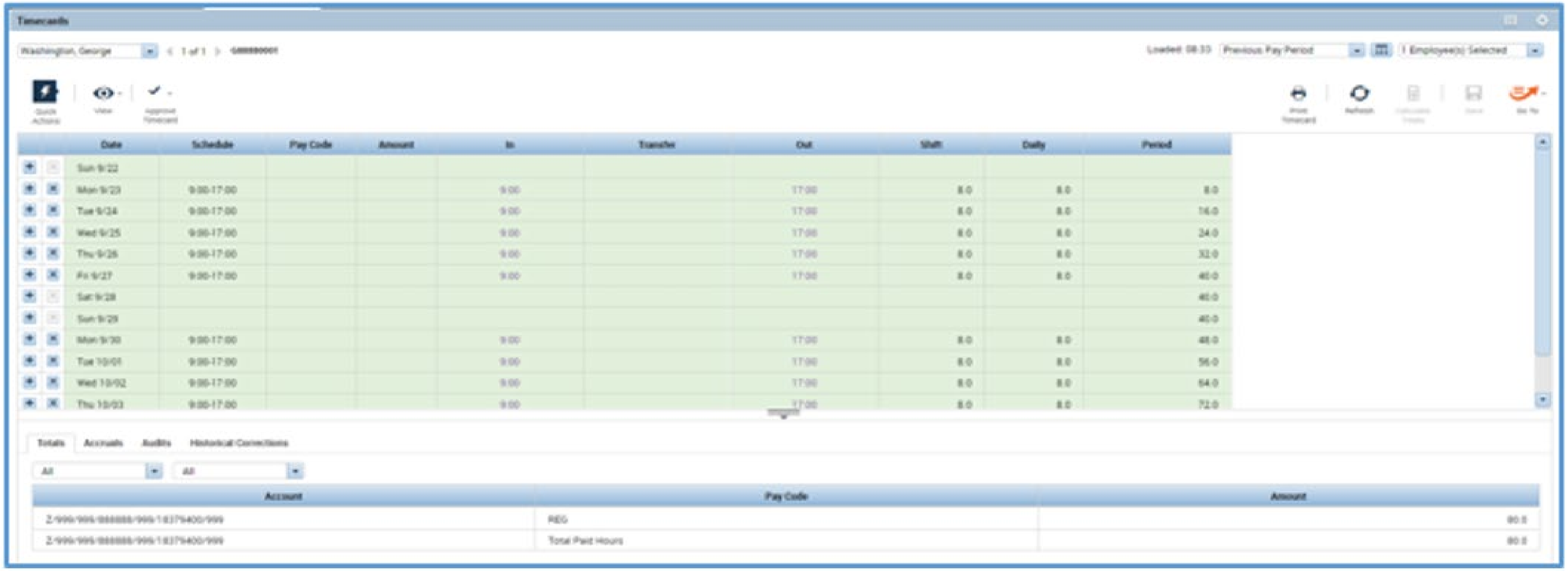
Confirming Timecard Approval

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



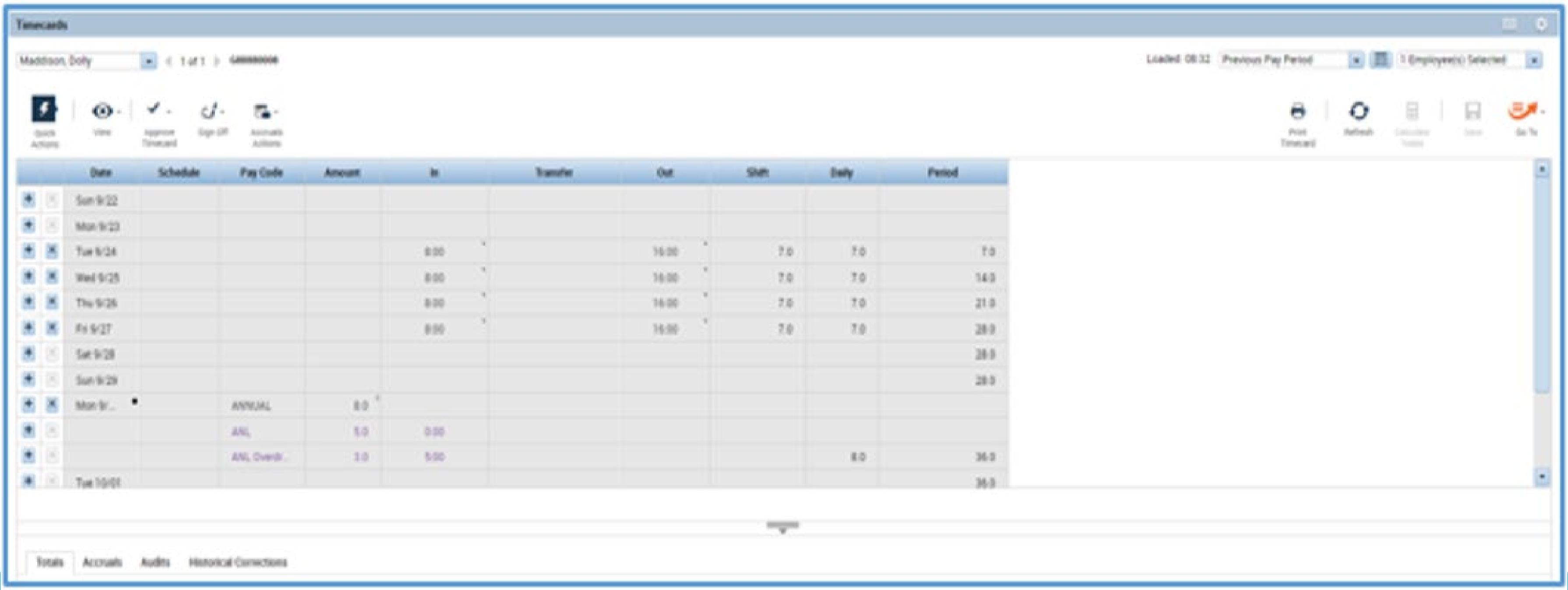
Confirming Timecard Approval

- 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***)

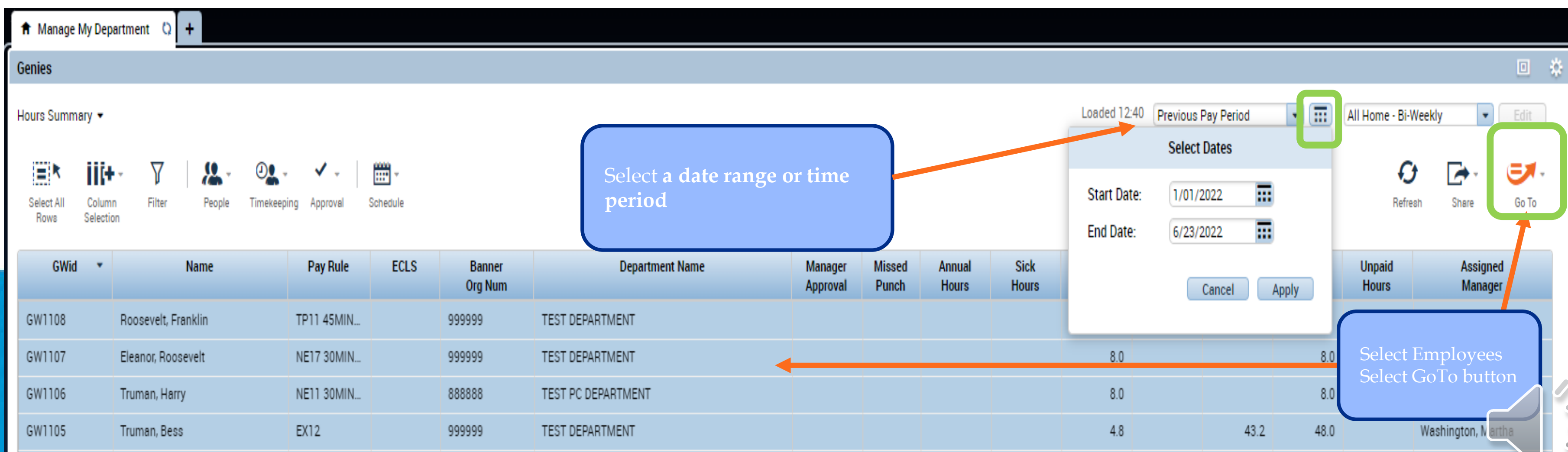


Reports

Reports

To run any report:

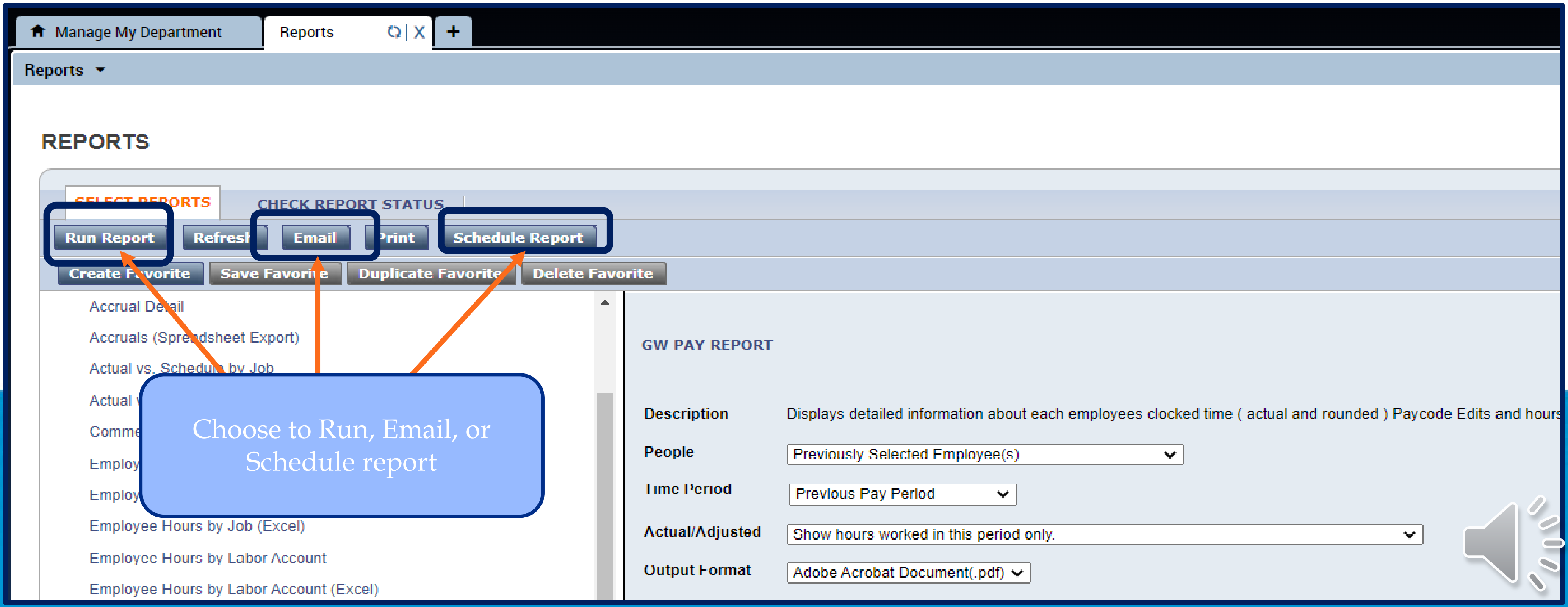
- Select date range
- Select employees to run a report
- Select the **GoTo** button
- Select Reports from the drop down



Reports

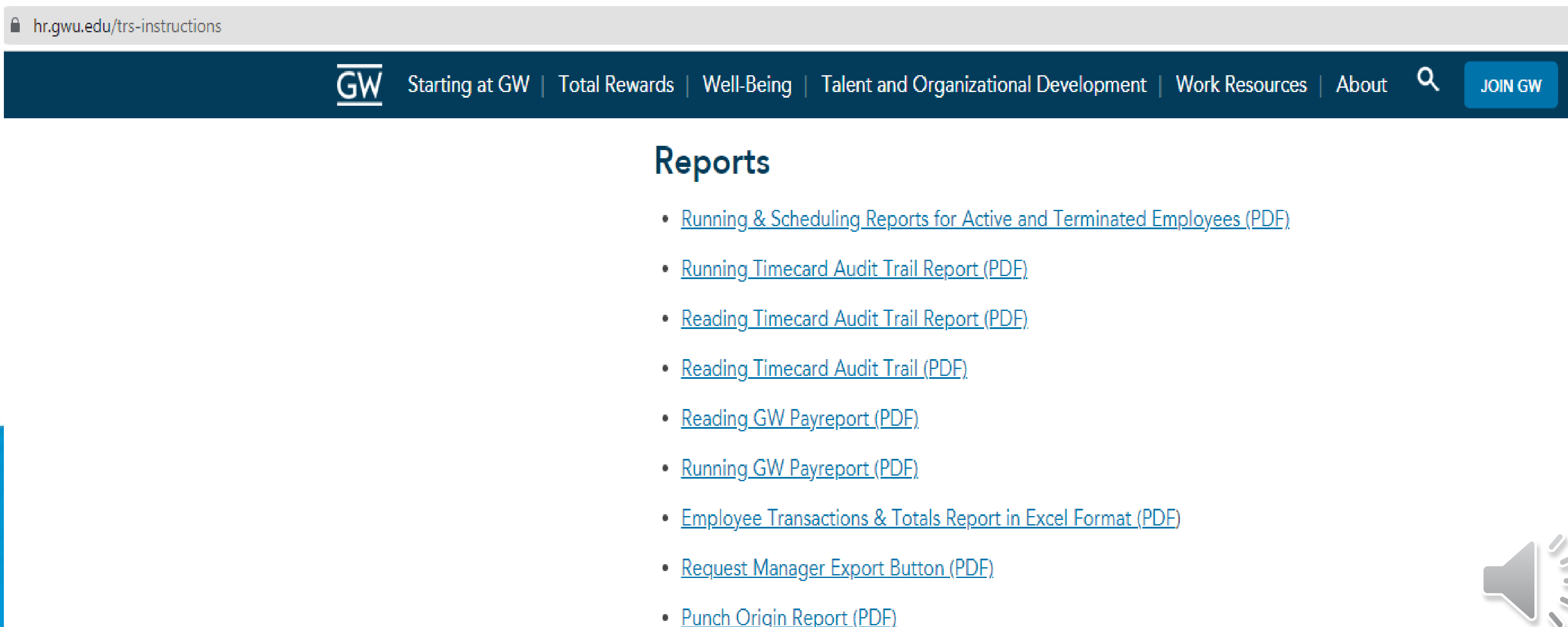
To run any report:

- 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



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



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

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