Time
Information
Management

TIM MANUAL

FOR TIM MANAGERS
AND TIM ADMINISTRATORS

May, 2019

Contents

Introduction to TIM

The Time Information Management System (TIM) is the University's system for tracking employee hours worked and leave taken. The accurate tracking of hours ensures that employee pay is calculated correctly. This also allows the University to maintain comprehensive information for reporting purposes. This manual will cover the TIM features and procedures relevant to TIM Administrators and Managers.

TIM Manager

In order to be a TIM Manager, you must be identified in a SHRA Exempt or SHRA Non-Exempt employee's TIM Approver Field in ConnectCarolina.

- A TIM manager may be identified for employees who are in different departments from their own.
- TIM Managers must be university employees who are SHRA or permanent EHRA employees.
- TIM Managers identified in TIM as approvers for at least one active SHRA employee will be able to see timecards for all of the employees that have them listed in their TIM Approver fields in ConnectCarolina.
- Due to license constraints, approvers of only permanent EHRA employees are not able to become Managers in TIM. TIM Administrators can see these employees and update and sign off their timecards as needed.

If you do not see a Non-Exempt employee in your list, please contact your HR Representative to make sure that you are in the Non-Exempt employee's TIM Approver Field in ConnectCarolina and that the employee is active.

Note that employees who work in secondary positions will not appear in your list until they have transferred to that position in TIM at least once.

TIM Administrator

In order to be a TIM Administrator, a TIM Administrator Access Request Form must be submitted.

TIM Administrators see all of the employees in the department(s) they have access to. However, TIM Administrators cannot see employees who are in a home department that they do not have access to. For example, if you have access to department 300100 you will not see an employee whose home department is 300200 even if you are identified in that employee's TIM Approver Field. You must have access to 300200 to see that employee in TIM.

TIM Administrators must be University employees who are SHRA or permanent EHRA employees.

Note that employees who work in secondary positions for your department will not appear in your list until they have transferred to that position in TIM at least once.

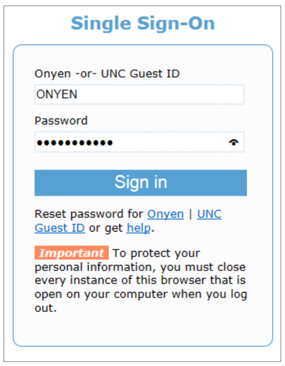
Logging in & Signing Out

You can log in to TIM either by going directly to the TIM URL or via ConnectCarolina.

To use the TIM URL

1. Go to https://unctim.unc.edu in your browser.

The standard UNC Single Sign On screen will appear.



2. Type your Onyen in the User Name field.
3. Type your Onyen password in the Password field.
4. Click Sign in.

This will take you directly in to TIM.

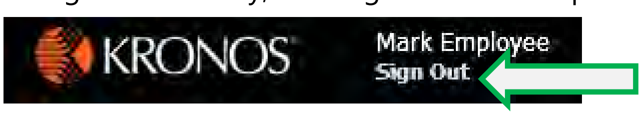
To access via ConnectCarolina

1. Go to https://connectcarolina.unc.edu/.
2. If the UNC Single Sign On screen appears, sign in as described above.
3. From the Self Service home page, select TIM.

The TIM application will open.

Signing Out of TIM

1. To sign out securely, click Sign Out in the top left of your screen.

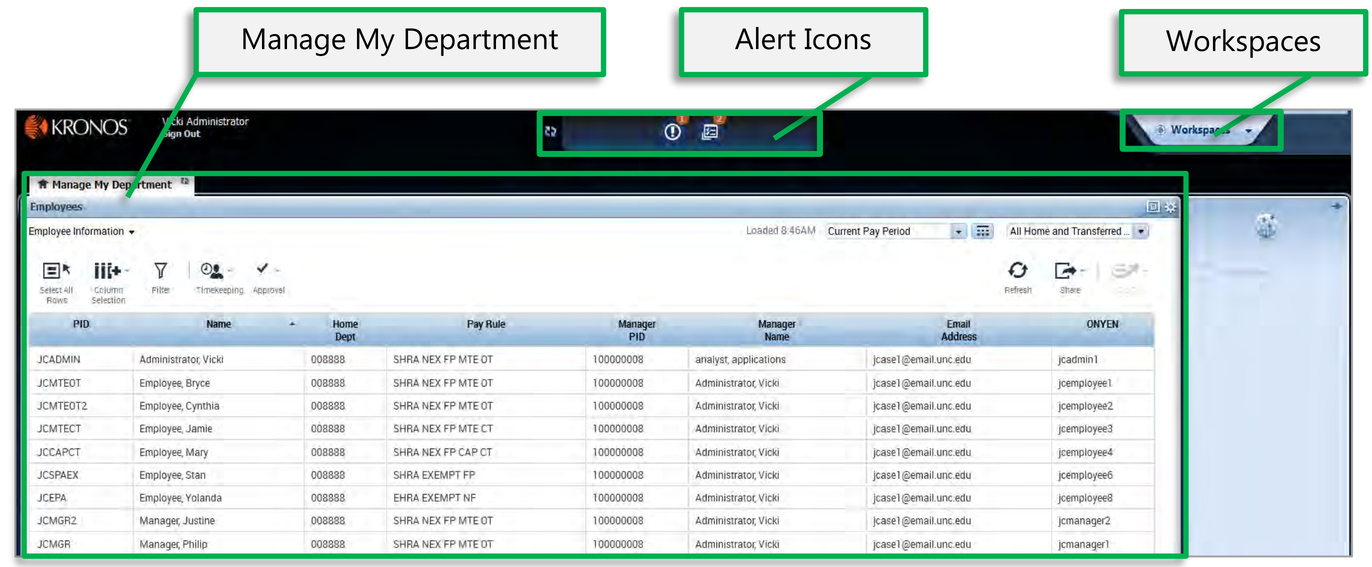


2. After you have signed out of TIM successfully, use the X button in the top right corner to close the web browser.

❖ TIM is set to automatically sign out after 30 minutes of inactivity.

Navigating TIM

The Manage My Department tab and Alert Icons are displayed when a TIM Administrator or Manager logs in to TIM.



The Manage My Department tab displays targeted information on the employees assigned to you in TIM.

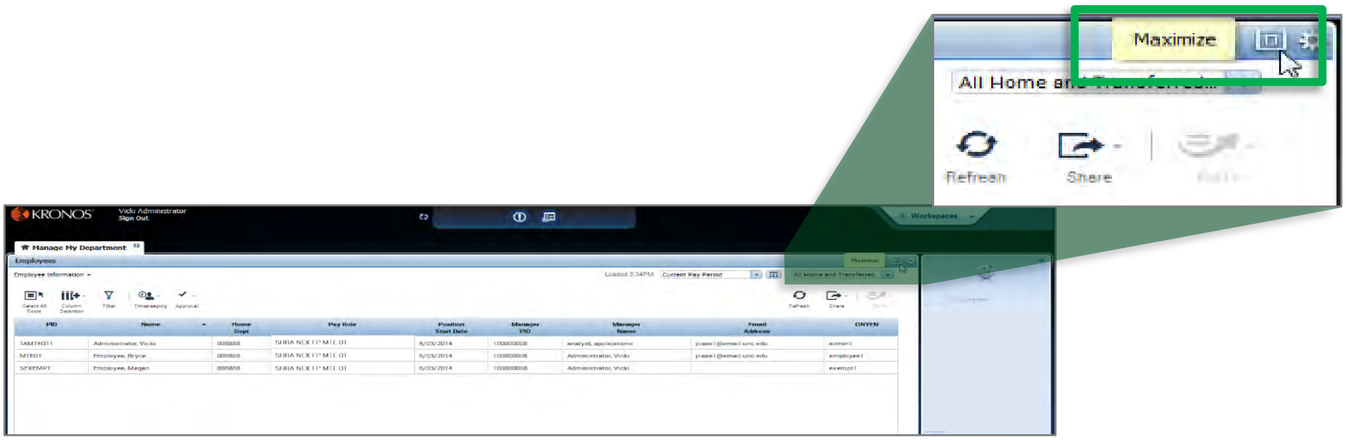
Alert Icons let you know if there are timecards with missed punches, Time-Off requests, or manager Delegate Authority requests to respond to.

Workspaces button is used by Managers and TIM Administrators to open their individual timecard.

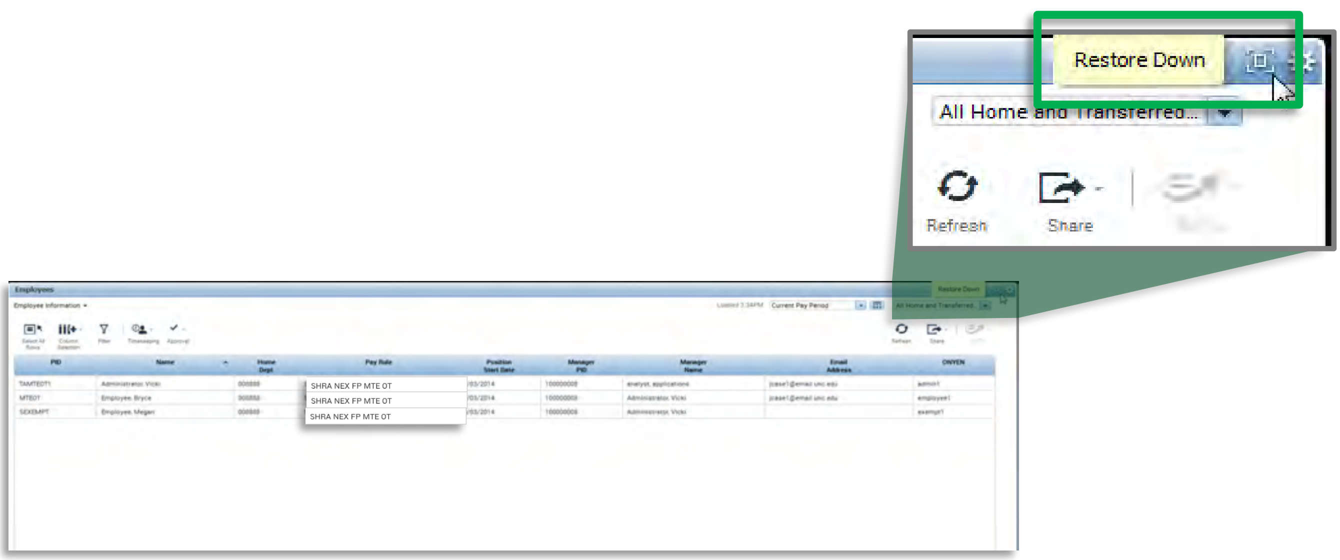
A Few Tips for Displaying More Information on the Screen:

Maximizing and Minimizing an Open Tab

To expand any tab that you have open in TIM in order to display a larger view, click the Maximize button in the top right.



To restore the tab back to the original size click the Restore Down button in the top right.



Minimizing the Sidebar

You can also minimize the sidebar on the right side of the screen that is not used in order to display a larger view of the main screen by clicking the right pointing arrow in the top right.

Before

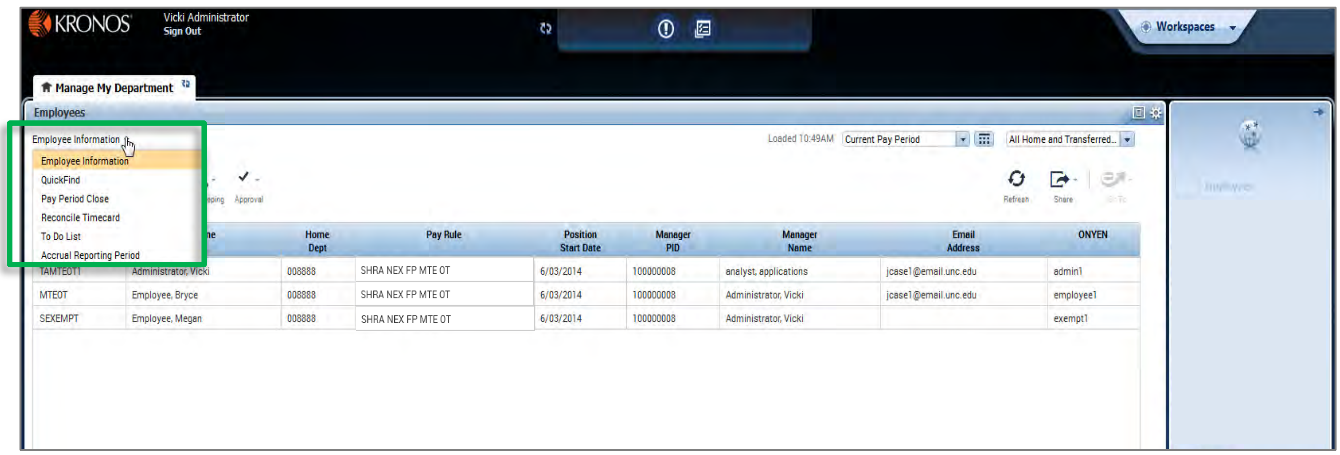
After

Manage My Department Tab

This section of the reference guide will cover the following:

- Using Genies to Display Targeted Information
- Selecting a Time Period
- Utilizing Hyperfinds to Display Specific Employee Types
- Icons in the Manage My Department Tab

Selecting a Genie



Each genie will display targeted information for the employees selected. The following genies will appear in TIM for TIM Administrators and Managers:

Employee Information: This is the genie displayed when a TIM Administrator or Manager logs in to TIM. The Employee Information Genie displays general information (Pay Rule, Email Address, ONYEN, etc.) about each employee assigned to the TIM Administrator. *Pay rules start with SPA or EPA in your list in TIM. These will be updated to SHRA or EHRA in the future.*

QuickFind: Allows TIM Administrators and Managers to search for individual employees

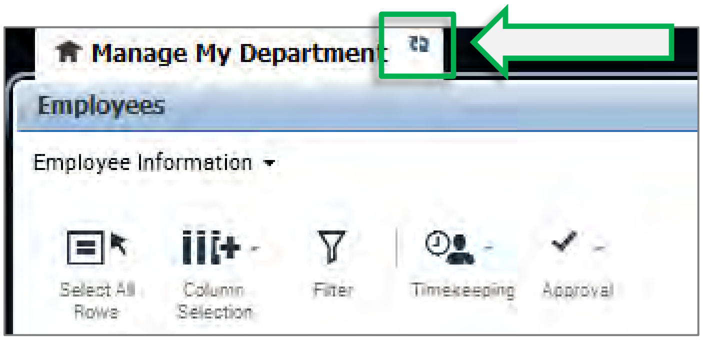
Pay Period Close: Displays information relevant to approving and signing off employee timecards at the end of a pay period.

Reconcile Timecard: Displays information that may assist with identifying and reviewing timecard information.

To Do List: Displays a list of employee timecards that may need attention due to a missed punch.

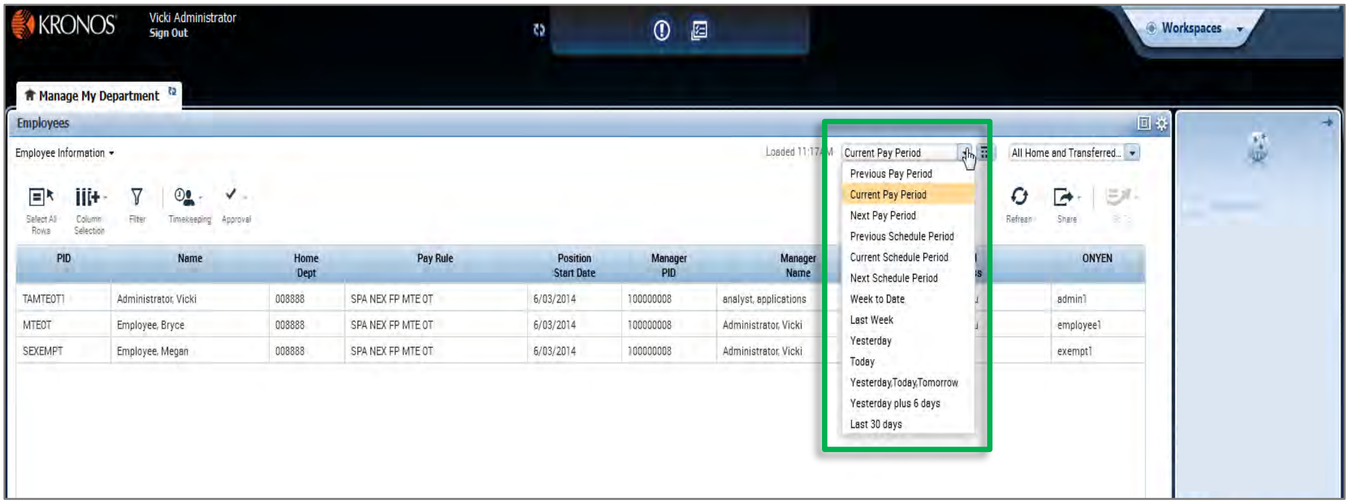
Accrual Reporting Period: Displays all accruals for the selected reported period for the permanent employees assigned to TIM Administrator or Manager.

To return to the Employee Information Genie after visiting any of the other genies, click the return icon to the right of the Manage My Department tab header or click the drop down arrow and select Employee Information.

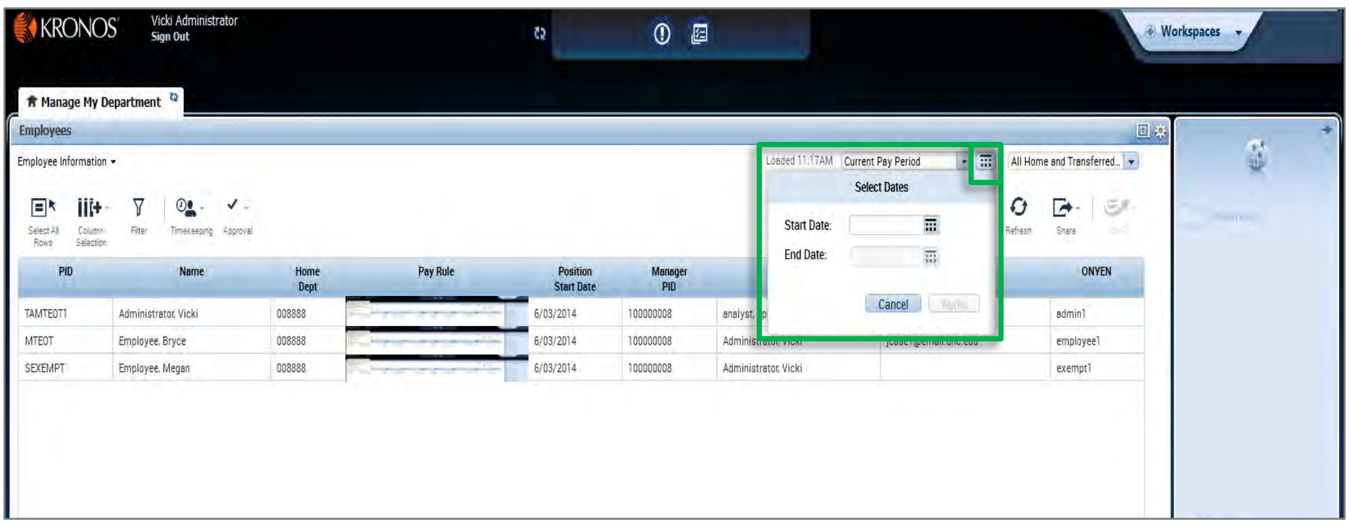


Selecting a Time Period

The **Pay Period Selector** allows you to select the pay period that you wish to display on the screen.

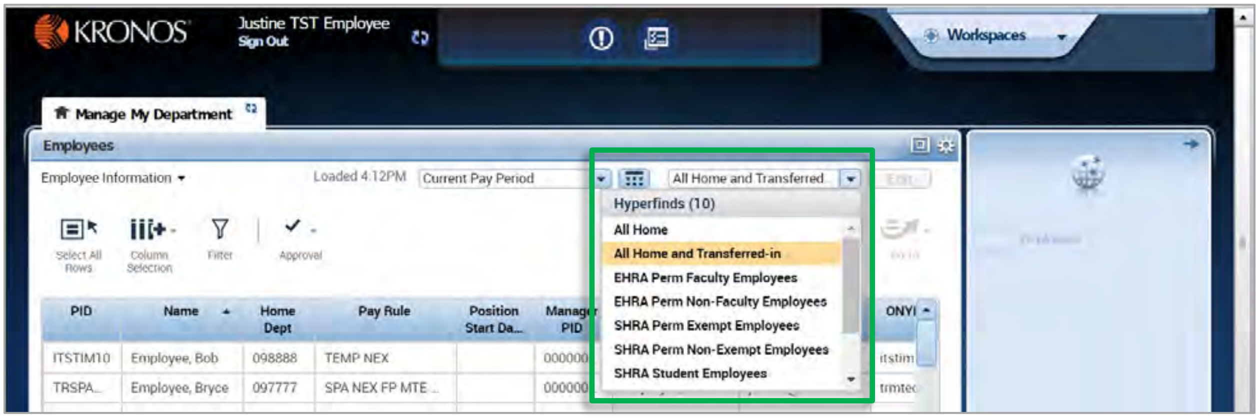


The **Date Range Selector** allows you to select a specific range of dates to display on the screen.



Utilizing Hyperfinds to Display Specific Employee Types

Hyperfinds allow you to filter your employee list by specific employee settings (SHRA, EHRA, temporary, etc.). Hyperfinds are accessed via the **Hyperfind Selector**.



Employee List Reminder:

- **TIM Managers:** By default, your employee list in TIM includes all SHRA Exempt and Non-Exempt employees as well as any EHRA permanent employees that have you listed in their TIM Approver field in Connect Carolina. You will also see SHRA Temporary or Student employees who have transferred to a secondary position that report to you.
- **TIM Administrators:** By default, your employee list includes all SHRA & EHRA employees in your department(s) along with those that have transferred to a secondary position in your department.

About the Public Hyperfinds:

All Home: Displays only those employees that report directly to the manager or are in the TIM Administrator's departments. It does not include employees who have transferred to a secondary position in their employee group.

All Home & Transferred In: This is the default hyperfind that appears when you first log in. It includes both employees that report to the manager or are in the TIM Administrator's departments and those that have transferred to a secondary position in their employee group.

EHRA and SHRA Employee Types: Display only the specific employee type selected.

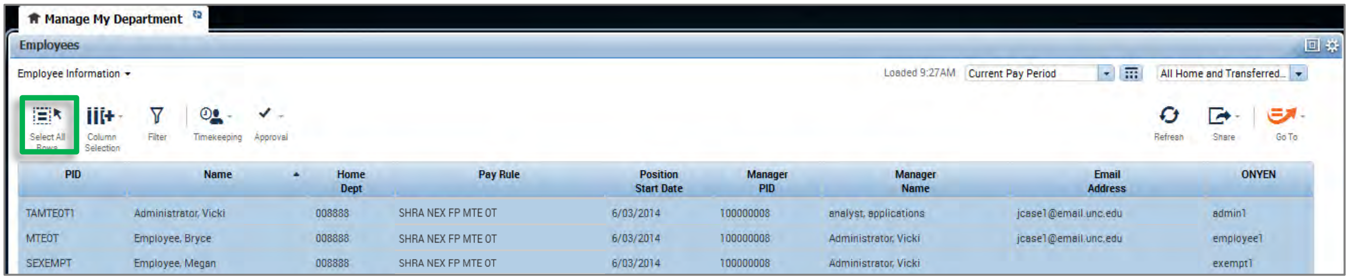
Sign Off-Biweekly: Displays SHRA Non-Exempt and Exempt employees only.

Sign Off-Monthly: Displays EHRA permanent employees only.

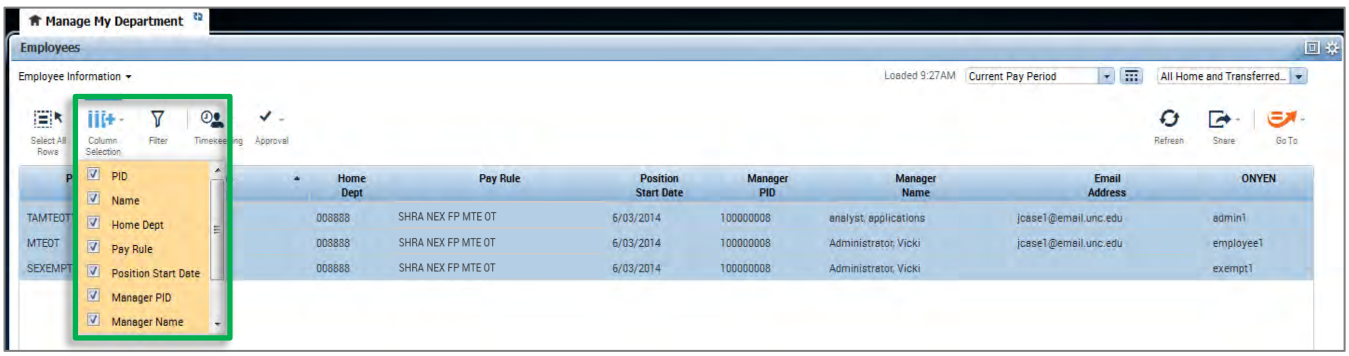
- TIM Administrators: See page 24 to learn how to create customized hyperfinds.

Icons in the Manage My Department Tab

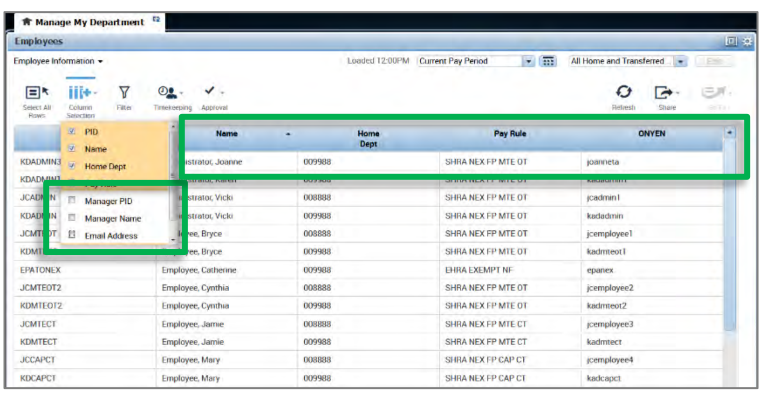
Select All Rows Icon: Will select all of the rows displayed on the screen. Click the icon a second time to unselect all rows.



Column Selection Icon: Allows you to decide which columns will be displayed and which will be hidden. To hide a column, click the check box next to the column header in the dropdown menu to uncheck the box.

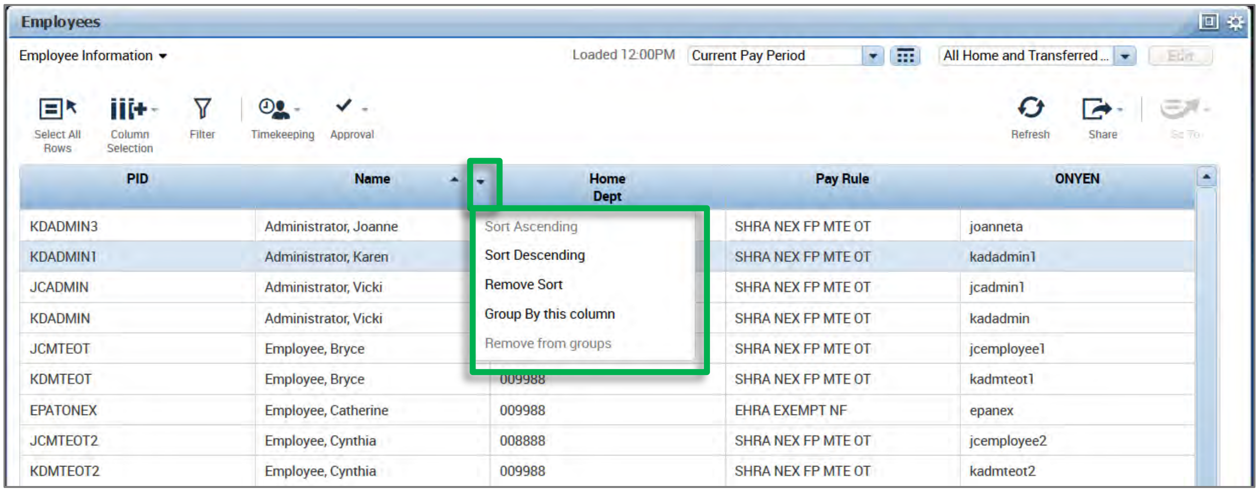


Example of Manage My Department tab with columns hidden:



You can also sort columns in ascending or descending order:

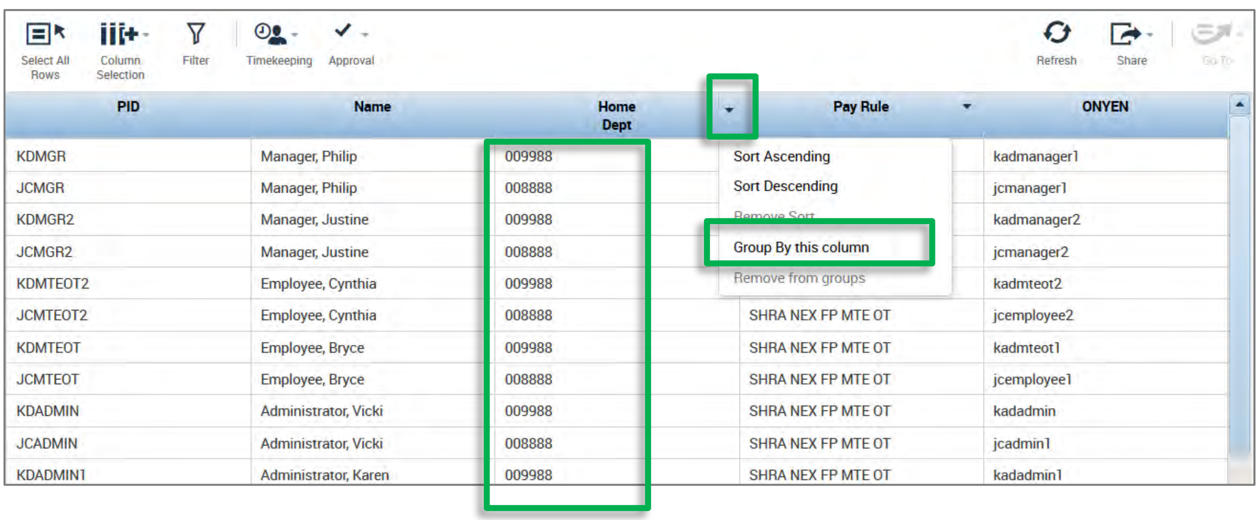
Continued...



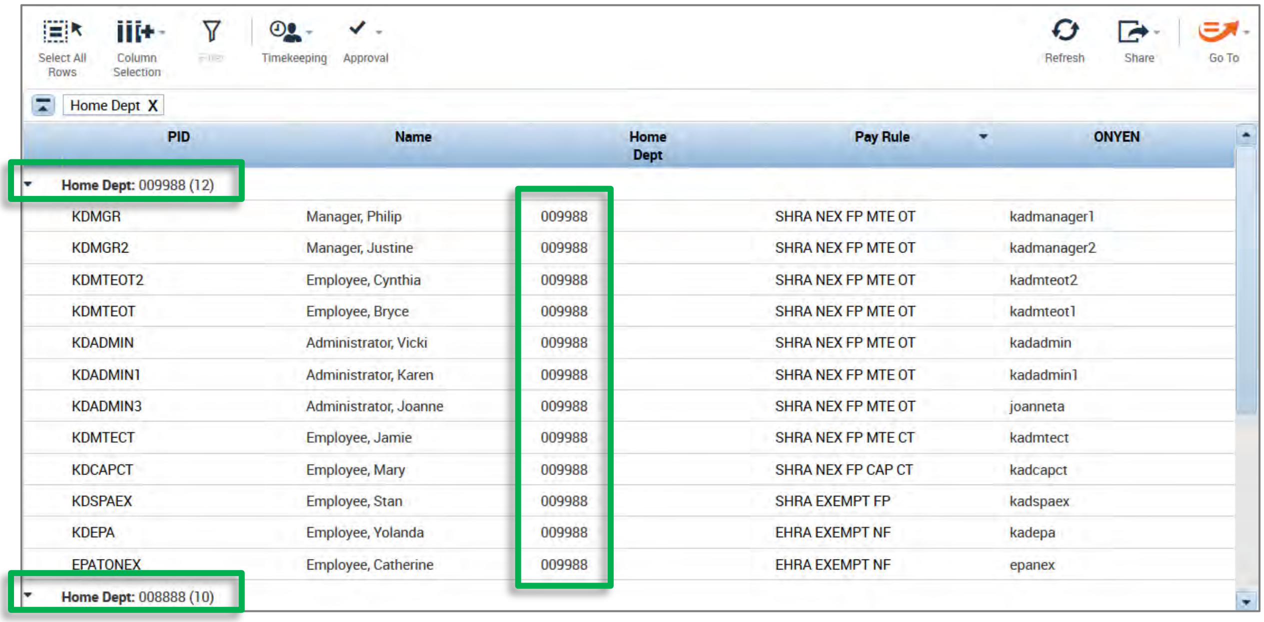
Group By this column: Allows you to group employees based on the categories provided in the column.

For example, you can group employees by home department number

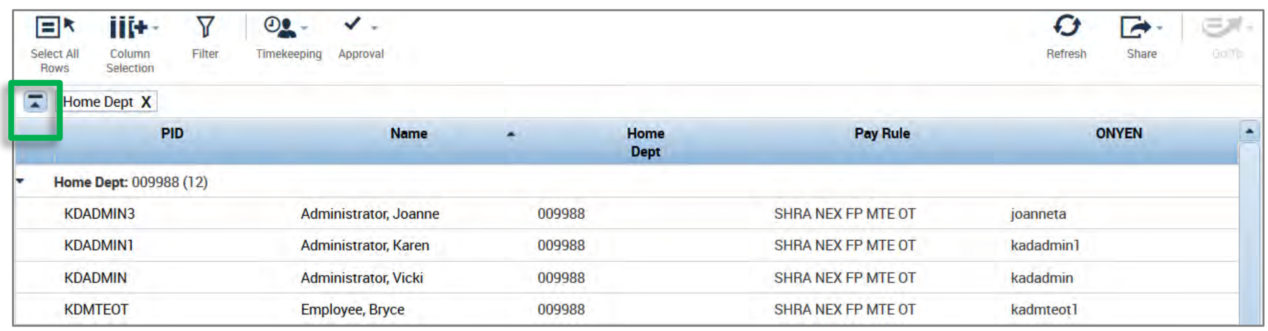
To do so, click the dropdown arrow on the right side of the column that you want to group and select Group By this column:



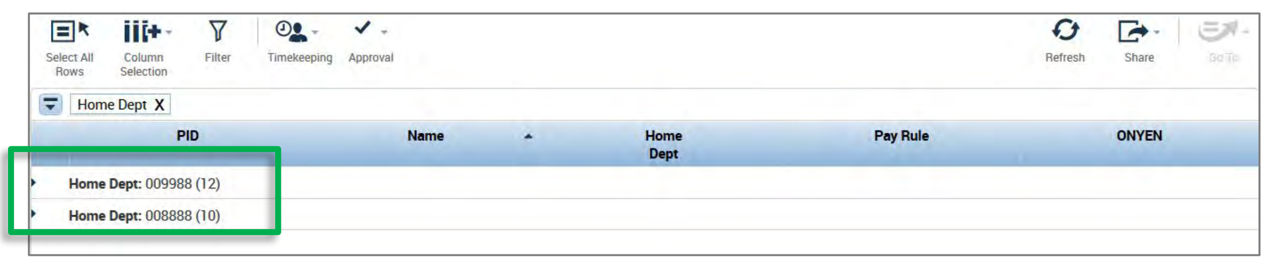
Result:



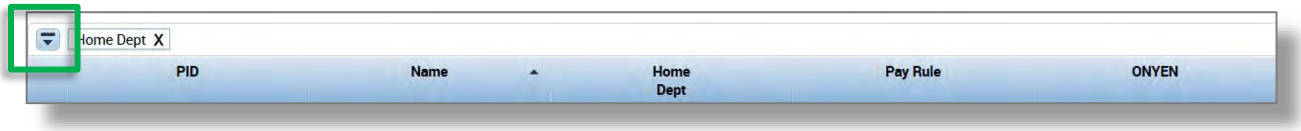
You can click the Collapse all groups icon if you only want to see group headers.



Result:

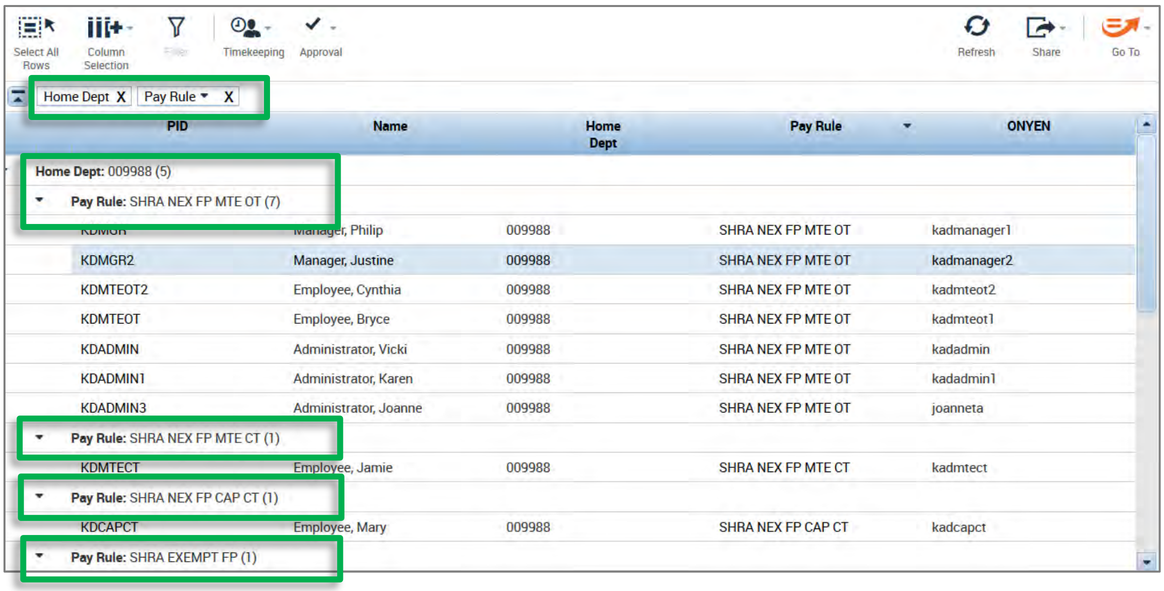


You can click the Expand all groups icon to return to the expanded view:

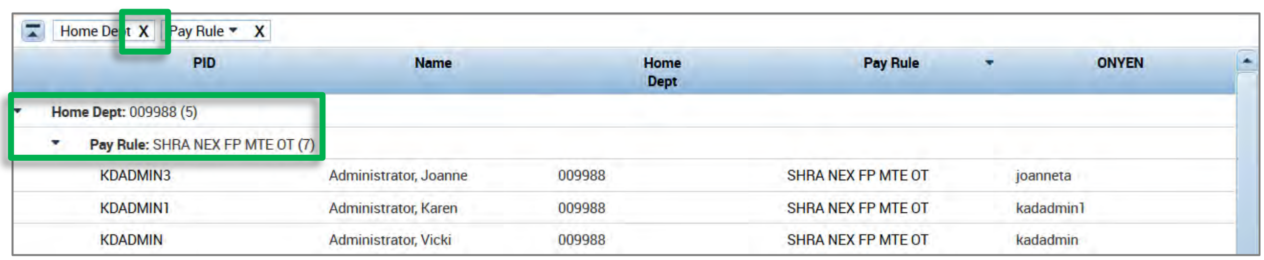


You can also group by more than one column at a time.

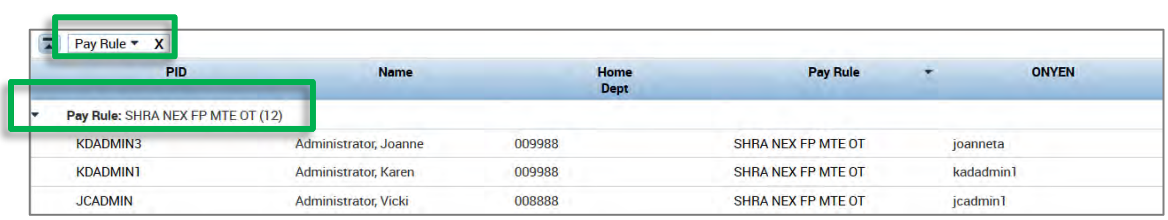
For example, you could group by Home Dept and then by Pay Rule:



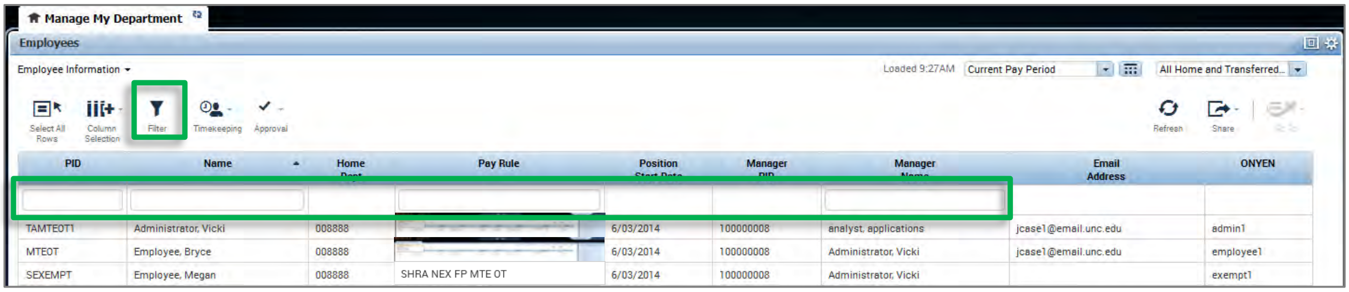
In order to stop grouping by a particular column, click the X in the right side of the grouping tab



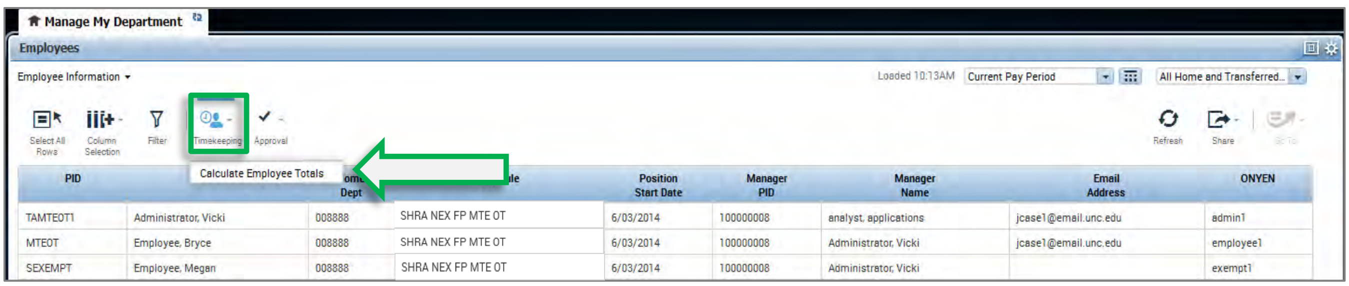
Result:



Filter Icon: Allows you to filter certain columns to only display information that meets a certain criteria. For example, you could enter “SPA NEX FP MTE OT” in the Pay Rule column to only display employees who fit this employee type. Click the Filter icon a second time to remove the filter and return to viewing your entire list of employees.

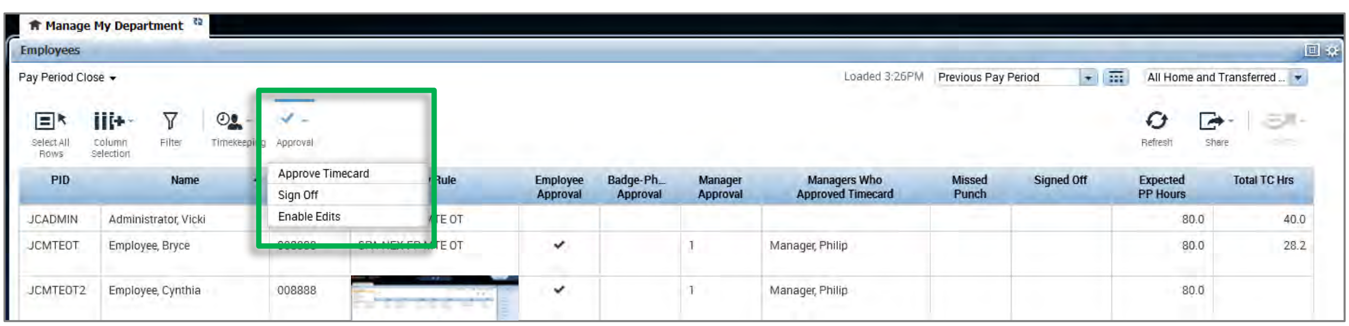


Timekeeping Icon: This icon is not active, please disregard.

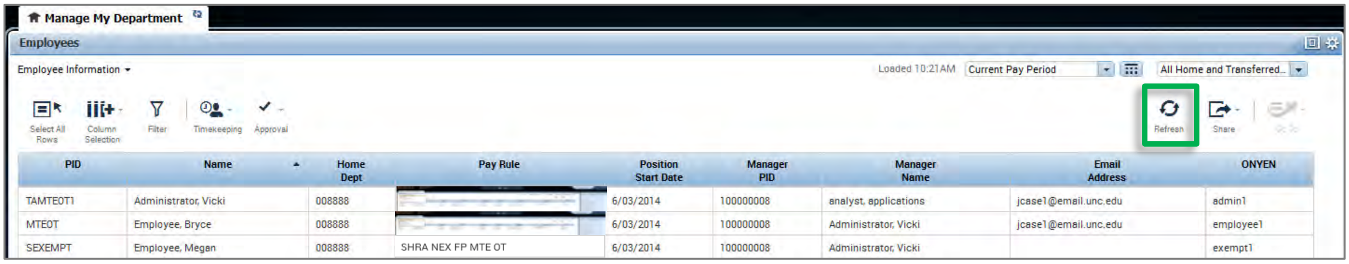


Approval Icon: Allows you to approve employee timecards. If you are a TIM Administrator it lets you sign off employee timecards or enable historical corrections. You can perform each action for a single highlighted employee or you can highlight multiple employees to perform each action for more than one employee at a time.

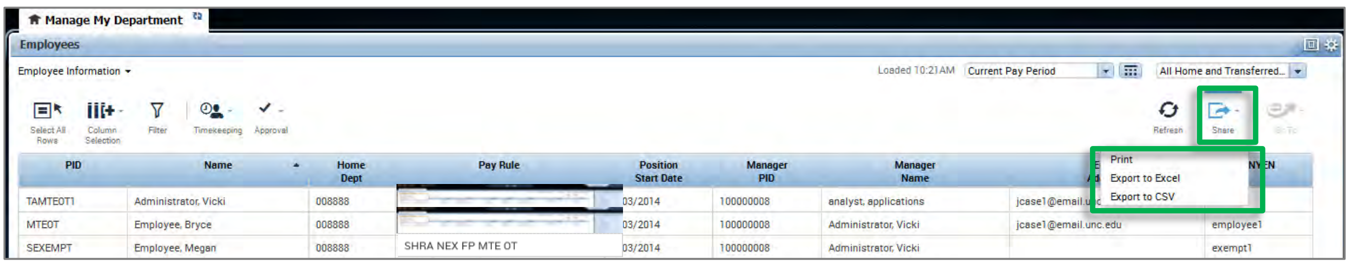
IMPORTANT: You **must** be in the Pay Period Close Genie to use the Approval Icon.



Refresh Icon: Allows you to refresh the information on the screen after performing a task.



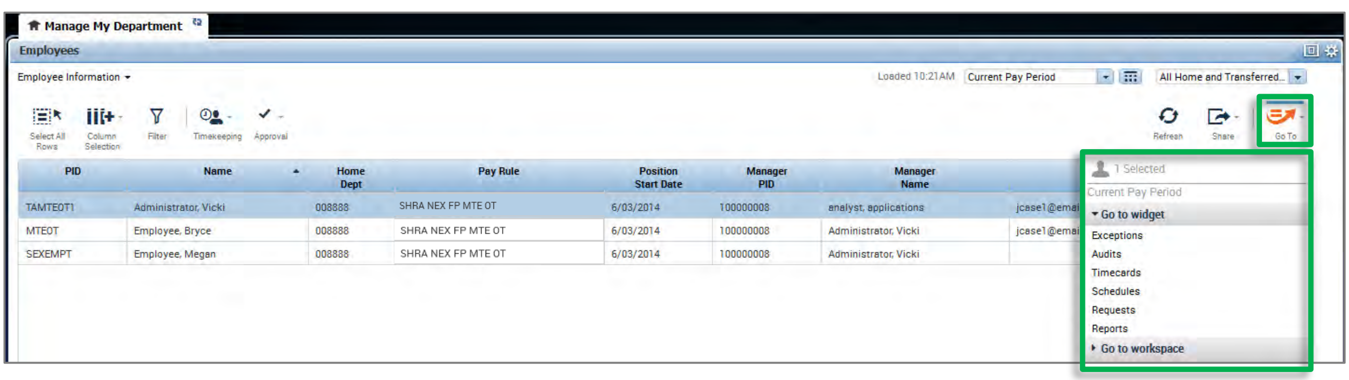
Share Icon: Allows you to either a) print the information on the screen, b) export the information on the screen to Excel, or c) export the information on the screen in Microsoft Excel Comma Separated Values format.



Go To Icon: This is a very important icon that you will use regularly. It allows you to utilize a variety of widgets for the employees that you have highlighted on the screen. You must have at least one employee selected in order for the Go To Icon to be available for use. You can select multiple employees at a time if necessary.

After you have highlighted an employee, click Go To Icon to display the drop down menu. Then, select the widget that you want to utilize for the employees selected.

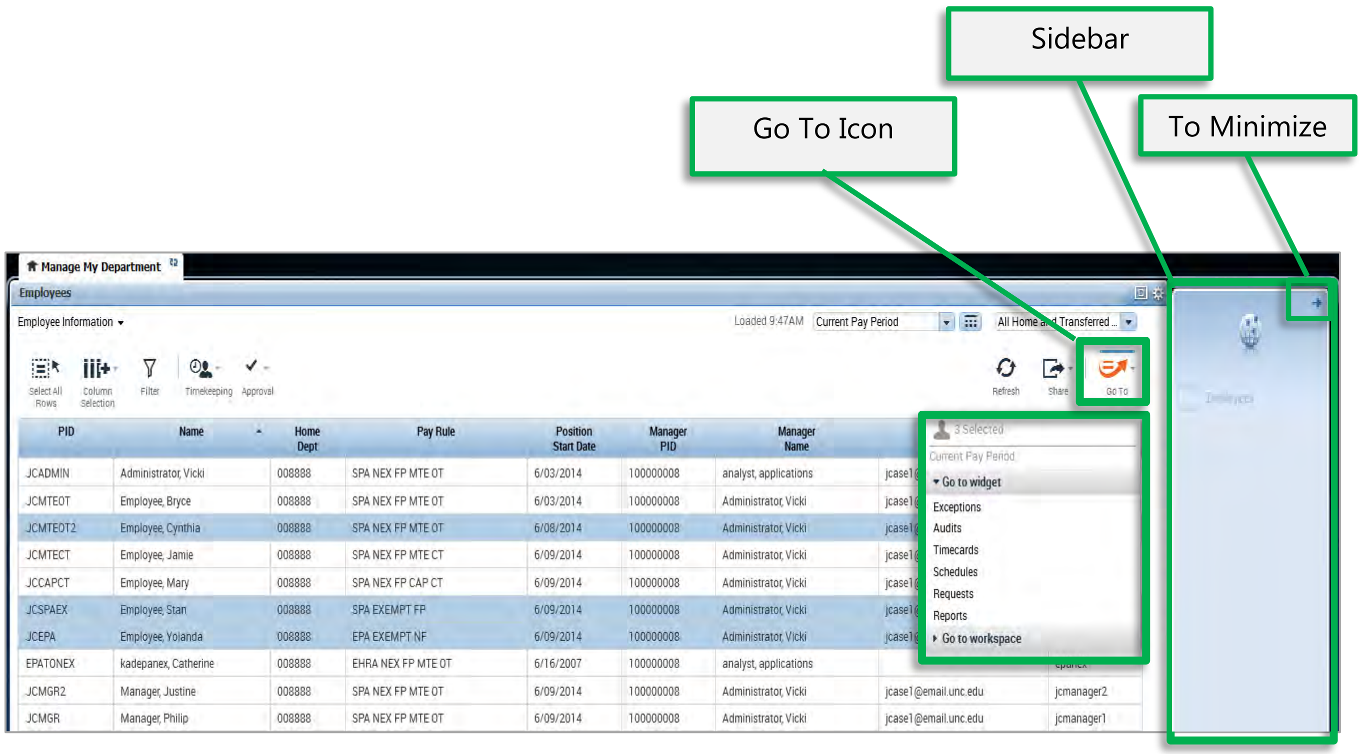
See "Using the Go To Icon" section on page 20 for more information.



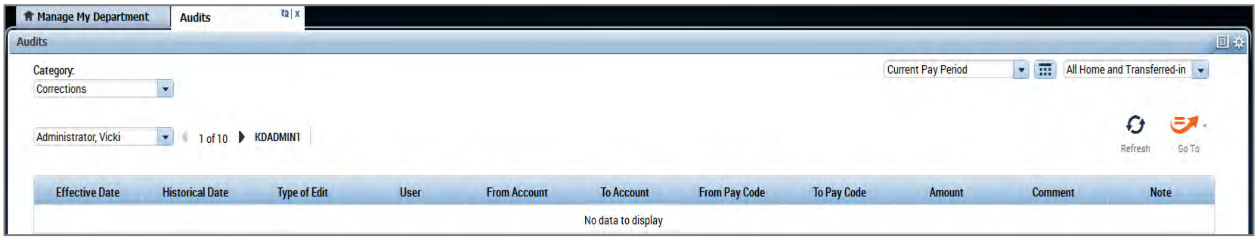
Using the Go To Icon

The Go To Icon will light up after at least one employee has been selected and will allow you to utilize a widget to display specific types of information related to only the employee(s) selected.

You may want to minimize the sidebar when you are not using it in order to display a larger view of the tab that you have open in the main screen. To minimize, click the right pointing arrow in the top right corner of the sidebar.

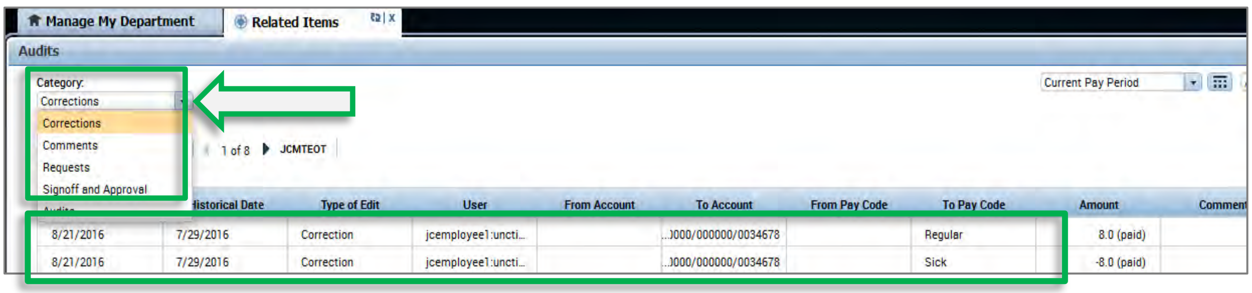


Audits Widget: Opens the audits tab that will display all of the audits made for the selected employee(s) in the time period selected including historical corrections, comments, time off notification requests, signoffs, and approvals.

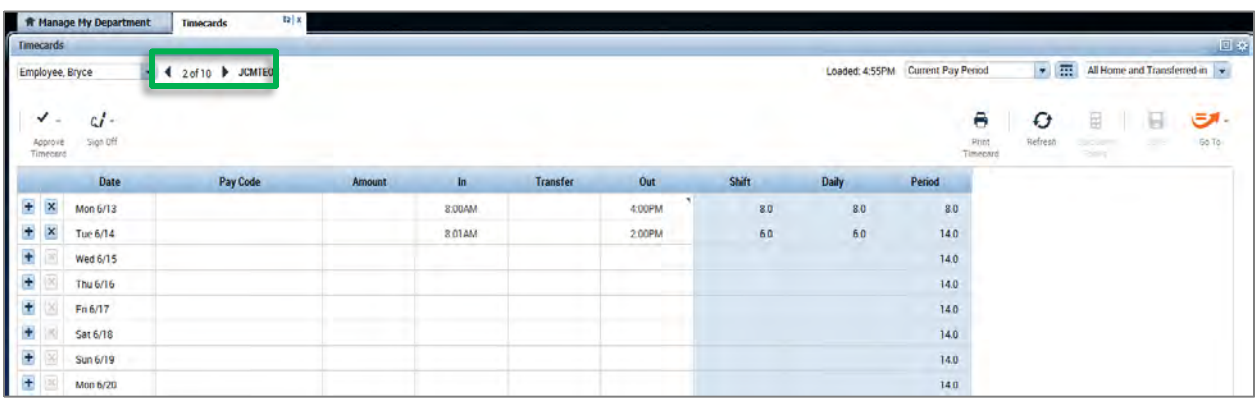


You can view the various types of audits that have been made in the time period selected by clicking the arrow on the right side of the Category field to display the dropdown menu and selecting the type of audits that you want to view.

For example, the Corrections category shows all of the Historical Corrections that were made effective in the time period selected.

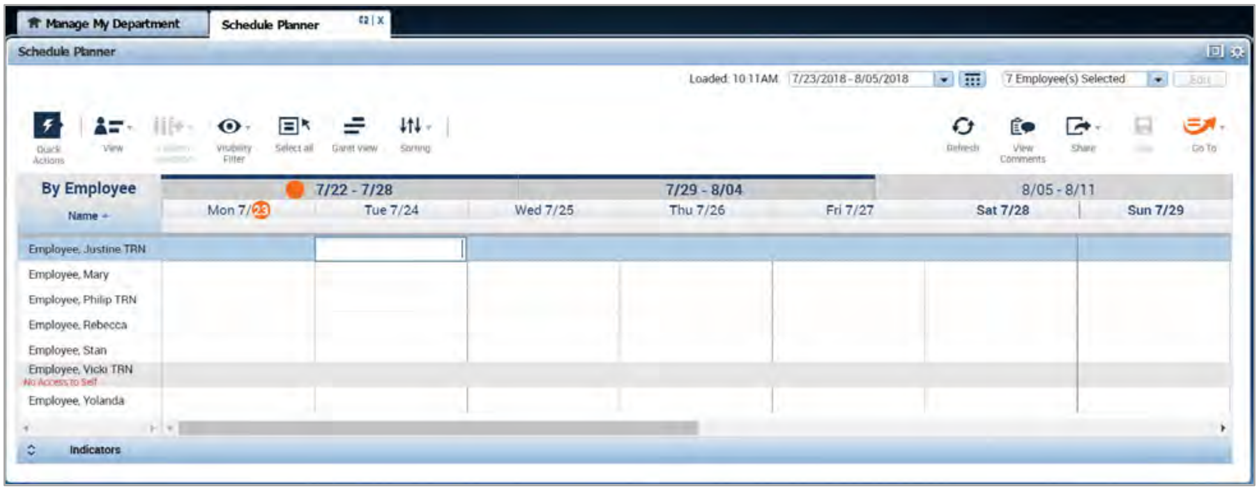


Timecards Widget: Opens the employees' timecards for the time period selected. Use the left and right arrows in the top left of the tab to scroll through employee timecards.



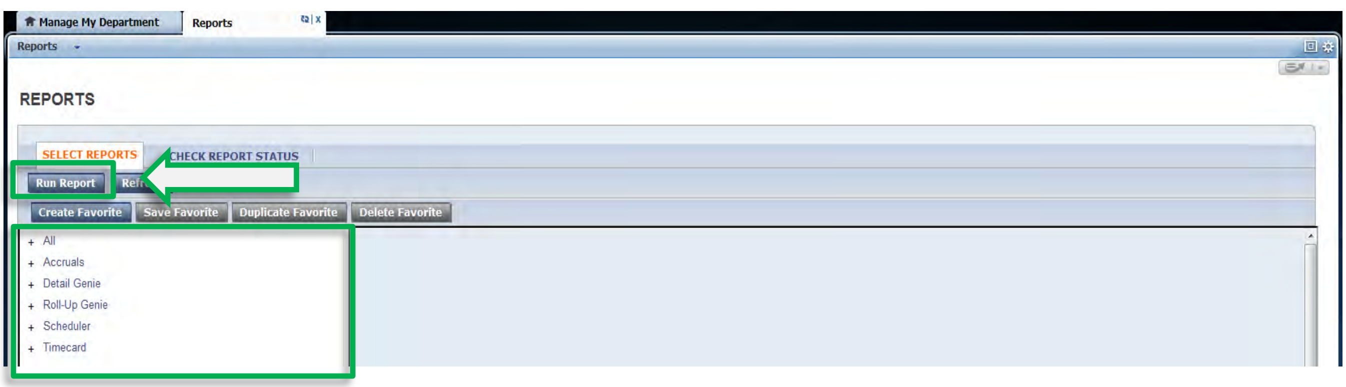
Schedule Planner Widget Opens the schedules for the selected employee(s).

❖ Be advised that it will typically take a significant amount of time for TIM to display the schedules for all of your employees after you have clicked the Schedule Planner Widget. For this reason, it is better to select one or just a few employees at a time.

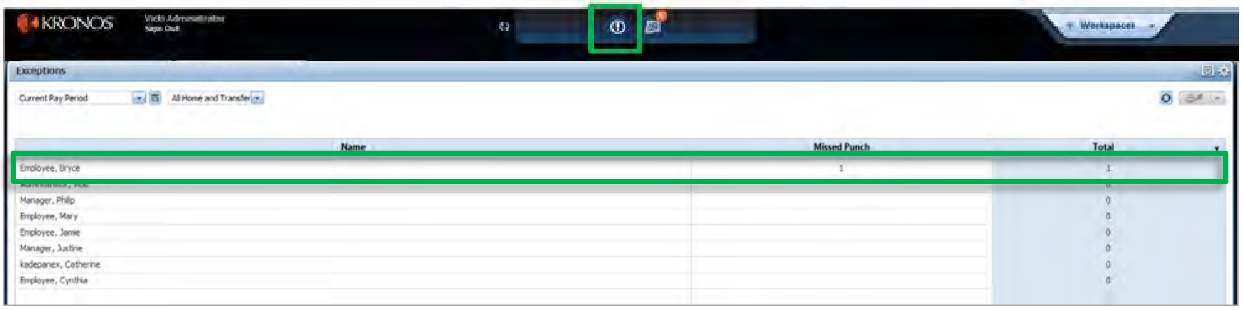


Reports Widget: Allows you to run a wide variety of reports for the selected employee(s).

Select the report that you want to run from the menu displayed and click Run Report.

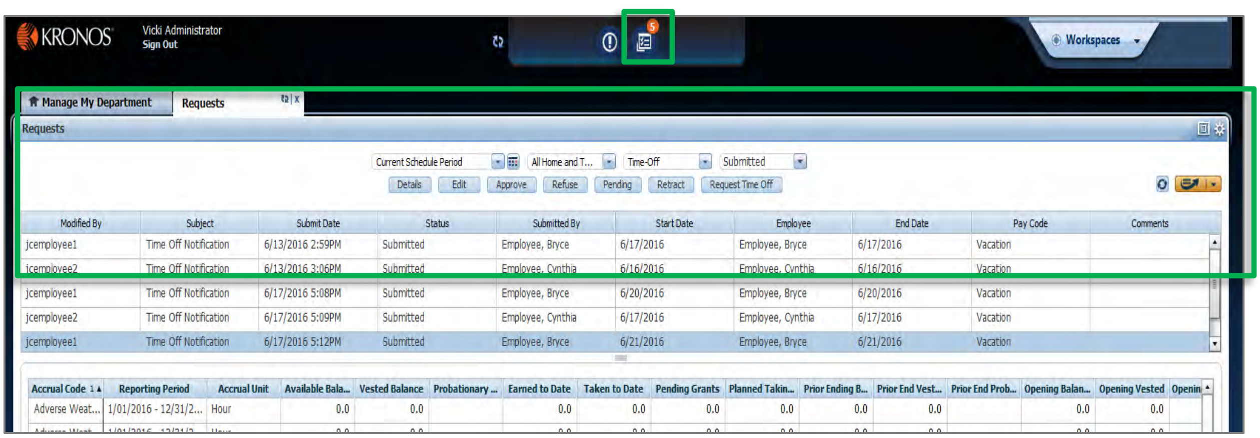


Exceptions Widget: Shows missed punches for the selected employee(s) during the time period selected.



❖ It is recommended that you use the Exceptions Alert Icon at the top of the screen instead. If there is a small orange circle with a number in the top right corner of the Exceptions Alert icon, it means that there are missed punches that require your attention.

Requests Widget: Shows you Time Off Notification Requests submitted for the employees selected within the time period selected.



❖ It is recommended that you use the Request Alert Icon at the top of the screen. If there is a small orange circle with a number in the top right corner of the Request Alert Icon, it means that there are Time Off Notification Requests that require your attention.

Customized Hyperfinds (TIM Administrators Only)

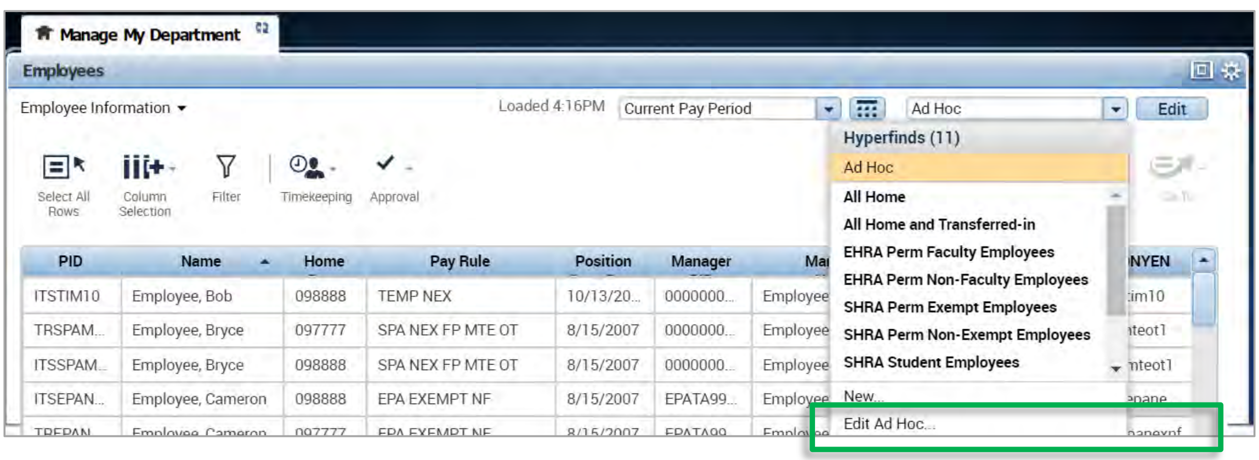
In addition to the public hyperfinds, TIM Administrators have the option to create custom hyperfinds. This allows administrators, who manage a large number of departments, to pull up a list of selected departments. This is especially useful when doing pay period close or reconciling timecards.

TIM has two types of customizable hyperfinds:

- **Ad Hoc**—Use this to setup a temporary custom hyperfind. Your customizations stay active in your workspace until you modify the Ad Hoc hyperfind again or log out of TIM.
- **Personal**—Create personal hyperfinds for very frequently reviewed departments. You can name these hyperfinds, and they will stay in your Hyperfind Selector. You should create an Ad Hoc hyperfind and review it to make sure it works as expected first. If you will use the selection frequently in the future, you may then elect to save it as a personal hyperfind. Instructions on how to create an ad hoc hyperfind and review it before saving it as a personal hyperfind are below.

Create a Temporary Ad Hoc Hyperfind

4. Select Edit Ad Hoc . . . from the bottom of the Hyperfind Selector list.



This opens the Hyperfind Queries dialogue. We will demonstrate selecting specific departments.

Use Ad Hoc to Display One or More Departments

1. On the Select Conditions tab select Primary Account.
2. Within Primary Account select Department.

3. Before you select your department(s), decide whether you want to **Include** or **Exclude** the department(s) you will be adding to the hyperfind condition.

   You will usually leave this set to Include, but if you want to view all of your departments except for the one(s) you identify, select the 'Exclude people who meet this condition' button instead.

4. Enter the department name or number in the Available Items box to search using one of the options below:

   If you know the department number:

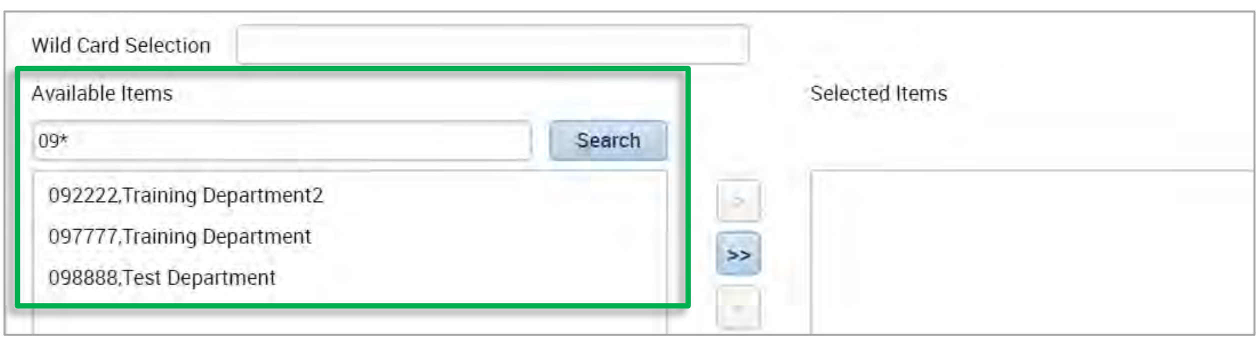
   Enter it into the Available Items box and click search.

If you don't know the department number but you know part of the name:

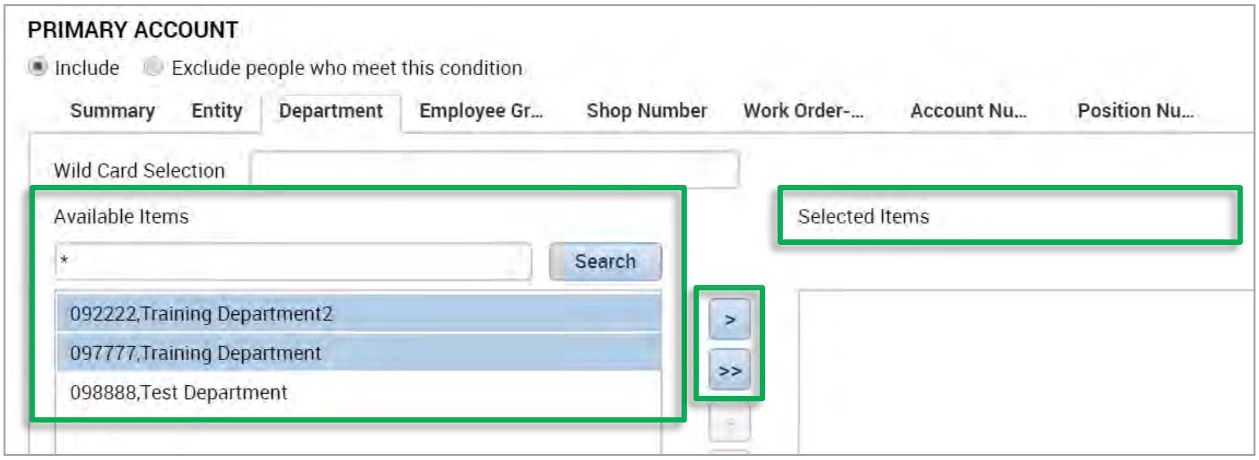
- In the example below we know that the department name includes the word "test," but we don't know the department number.
- Use an asterisk (*) as a wildcard at both the beginning and end of the word that is included in the department name.
- We type *test* into the search box and click Search. This brings up every department that the TIM Administrator has access to that has the word Test in it. In this case just one: 098888, Test Department.

If you want to find one or more departments that start with the same numbers:

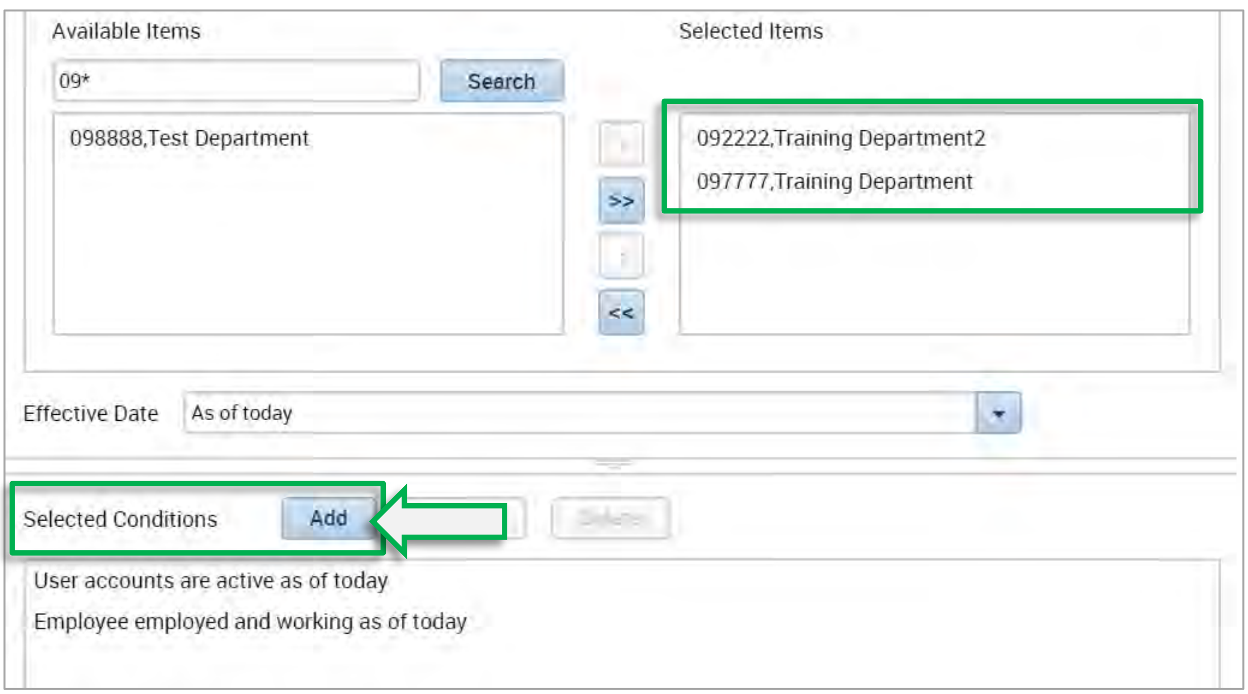
- For example, we want to find all employees we have access to who are in a training department. From experience we know that all the training departments in this example start with 09.
- We type 09* into the search box and click Search. This brings up all departments that we have access to in TIM that start with 09.



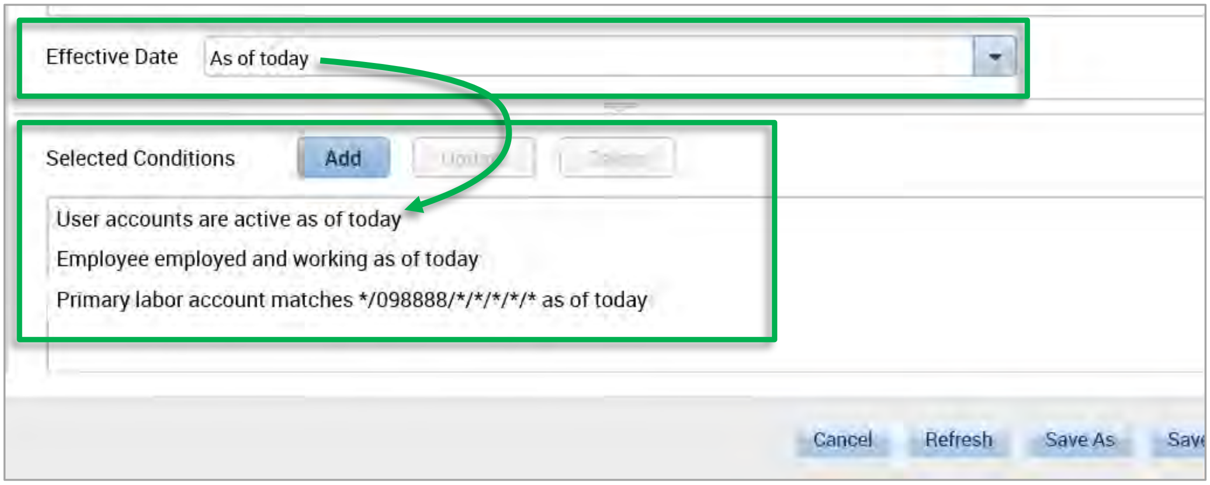
5. Move the department(s) you want to use into the Selected Items box.
   - The double arrow will move all items listed.
   - If you don't want all, click on the ones you do want and then click the single arrow to move the selected items.



6. At this point you could search for additional departments and add them to the Selected Items box if needed.
7. Once you have all the departments that you want to view in the Selected Items box, click the Add button to move them into the Selected Conditions list.



8. Review the list of Selected Conditions to verify that your settings are correct.
    - The Effective Date must always be left to "As of today" to avoid inadvertently overriding the conditions you specify.
    - By default, Ad Hoc hyperfinds include any "Employee employed and working as of today," which selects only active employees.



Add Employment Status to an Ad Hoc Hyperfind

Another useful filter is Employment Status, which allows you to view Terminated employees only.

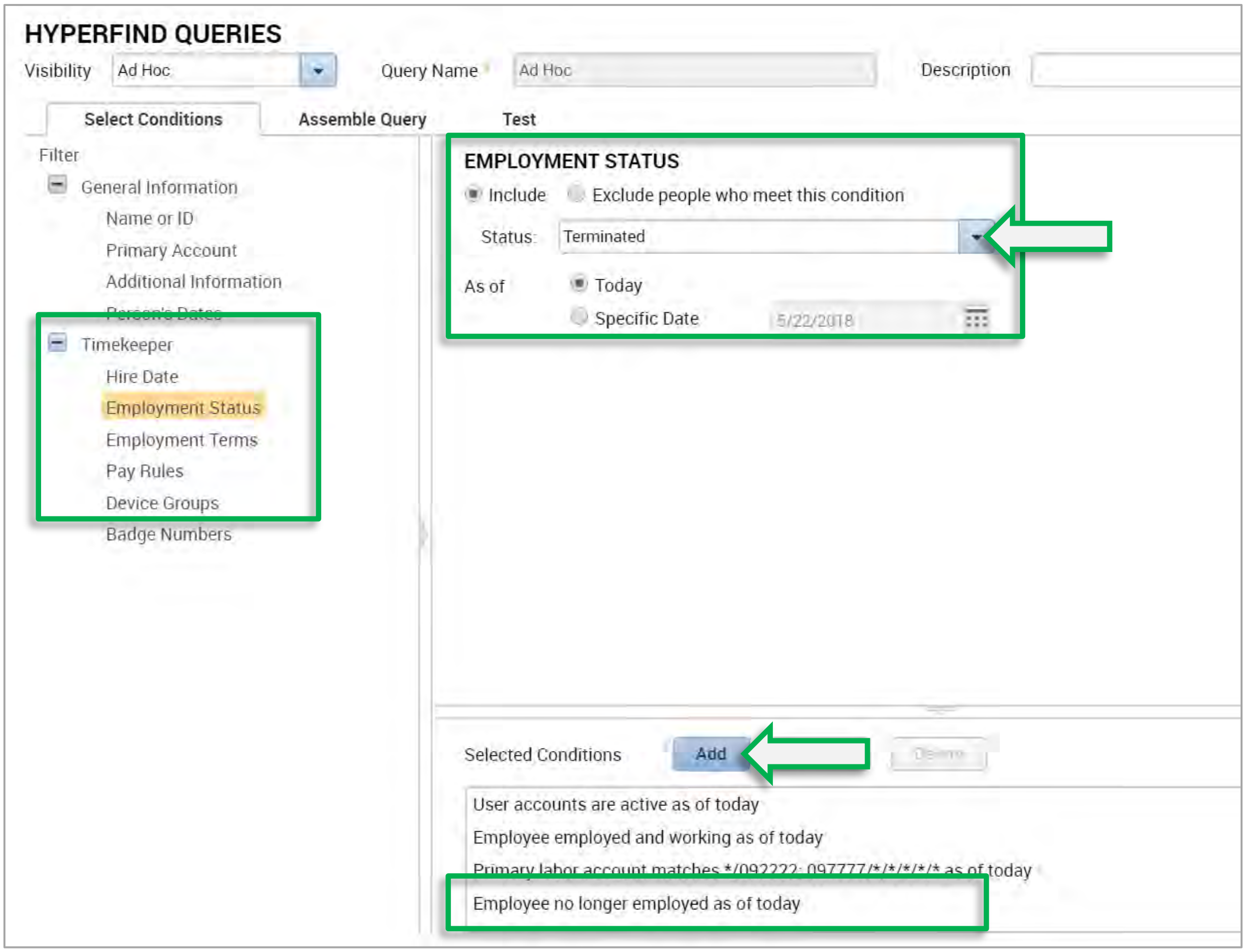
1. Be sure Ad Hoc is selected in your Hyperfind Selector.
2. Click Edit (you can also get there by clicking Edit Ad Hoc in the Hyperfind Selector).

Unless you have logged out or edited the hyperfind since selecting the department in the previous step, the department(s) you selected should still be listed in the Selected Conditions box.

3. Click the + to open the Timekeeper filter options.
4. Select Employment Status.
5. Select Terminated from the Status drop-down.

6. Click Add.

The new condition will appear in the list of Selected Conditions.



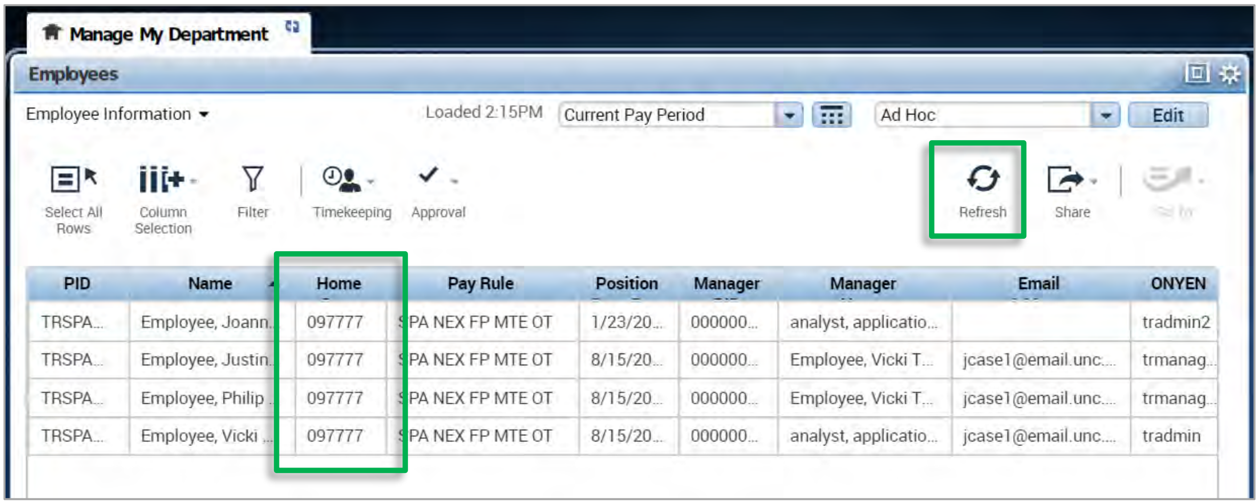
Based on the settings you chose when initially creating this Ad Hoc, you may now have the following conflicting conditions in your list:

- Employee employed and working as of today.
- Employee no longer employed as of today.

You need to remove any conflicting conditions. In this example we want to see only the employees who terminated during the pay period. We need toremove the “Employee employed and working as of today” condition.

7. Select the condition(s) you want to delete.
8. Click Delete.
9. Save the hyperfind.

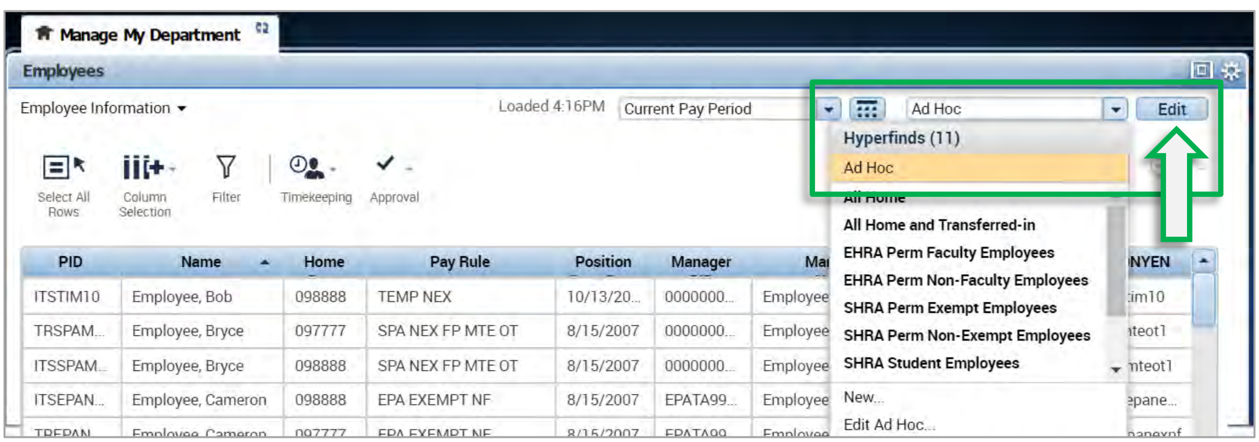
10. After Saving you need to click Refresh. The Ad Hoc hyperfind results will appear in your list.



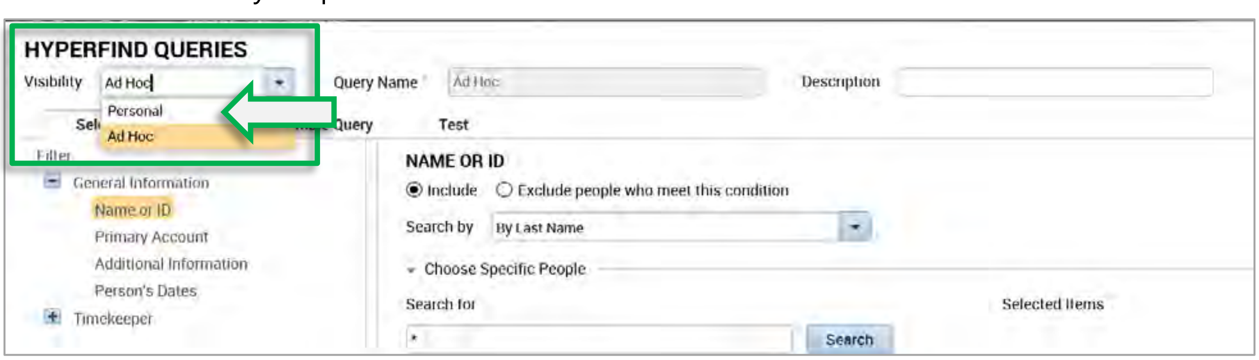
The Ad Hoc hyperfind will maintain these settings until you edit it again or sign out of TIM. Save an Ad Hoc Hyperfind as a Personal Hyperfind

If you need to view a select group of departments frequently you can save the ad hoc hyperfind as a personal hyperfind that will appear in your list of hyperfinds whenever you log in.

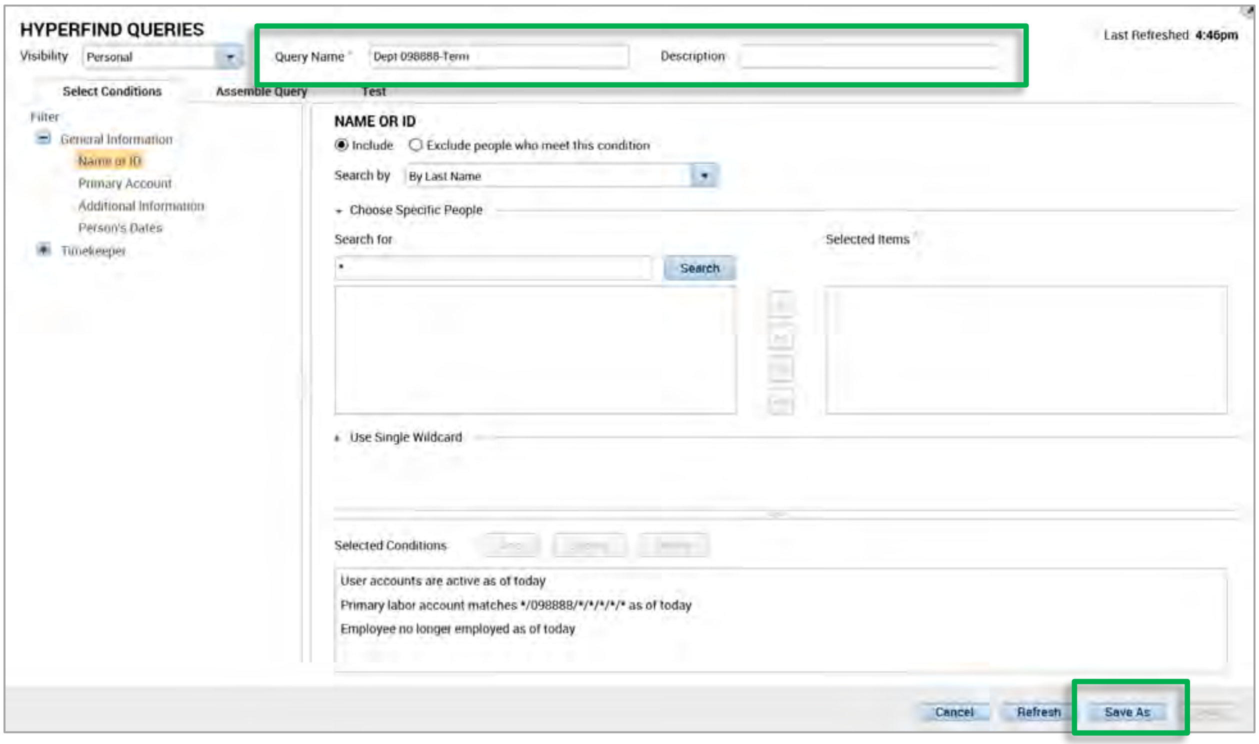
11. Select the Ad Hoc hyperfind from the Hyperfind Selector and click Edit.



12. Click the Visibility drop-down and select Personal



13. Add a Query Name that is short and descriptive. For example, 'Dept ######, Name, Employment Status' like 'Dept 098888, Test Group, Terms'
14. Add a description if you want to clarify the purpose of the query. Note that this will not appear in the list of hyperfinds.
15. Add or remove conditions as needed.
16. Click Save As.



❖ **Note:** the new personal hyperfind will not show up in your Hyperfind Selector until after you sign out and back in to TIM.

View Your Personal Hyperfinds

1. If you haven't already, sign out and back in to TIM.
2. Click the down arrow to open the Hyperfind Selector.
3. The selector will now list any personal hyperfinds you have created.
    - Hyperfinds will appear in alphabetical order.
    - Personal Hyperfinds will always appear in normal (not bold) text.
    - Public Hyperfinds, which you cannot edit, will always appear in bold text.
    - No one but you will be able to see or use the Personal hyperfinds you create.

Manage Your Personal Hyperfinds

TIM does not give TIM Administrators the option to delete personal hyperfinds, so you need to exhibit restraint when creating new ones. Tips for managing your hyperfind list:

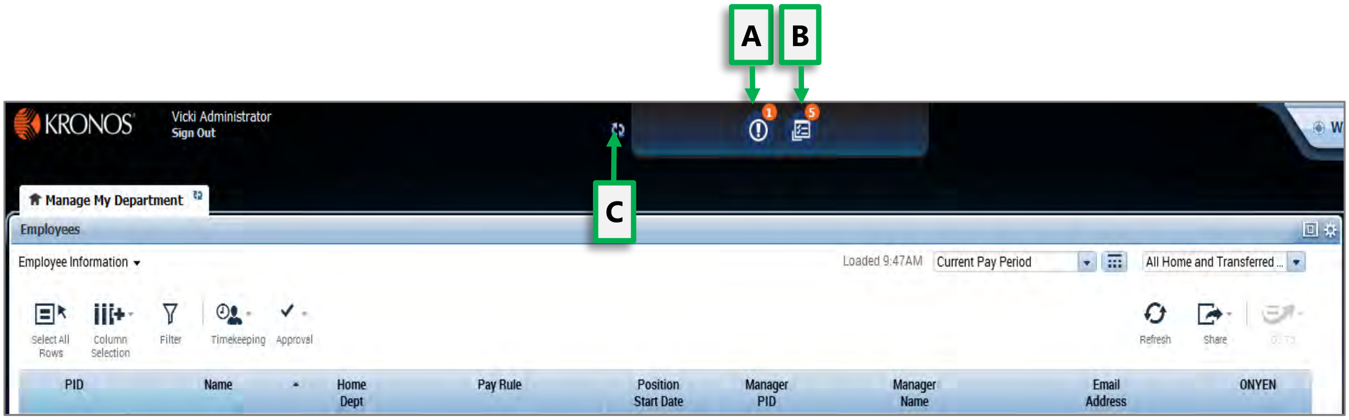
- Name your personal hyperfinds carefully to keep the list easy to navigate. For example, 'Dept ######, Name, Employment Status'
- If you only expect to use a specific query occasionally, use the Ad Hoc hyperfind instead of adding a new one to your list.
- You can update and **rename** an existing personal hyperfind rather than creating a new personal hyperfind.

Custom Hyperfind Reminder:

❖ If the edits you made to an Ad Hoc hyperfind are not working, you may need to Refresh your workspace.
❖ If a personal hyperfind you created is not showing up in the list, you may need to sign out and back in to TIM.

Alerts in TIM

This section will cover the Exceptions Alert, the Request Alert, and the Refresh Alerts Icon. A general overview is provided below and is followed by a more detailed explanation of each.



A. Exceptions Alert: Notifies you if employees have missed punches on their timecards. If there is a small orange circle with a number, it indicates that there is a timecard with a missed punch that requires your attention.

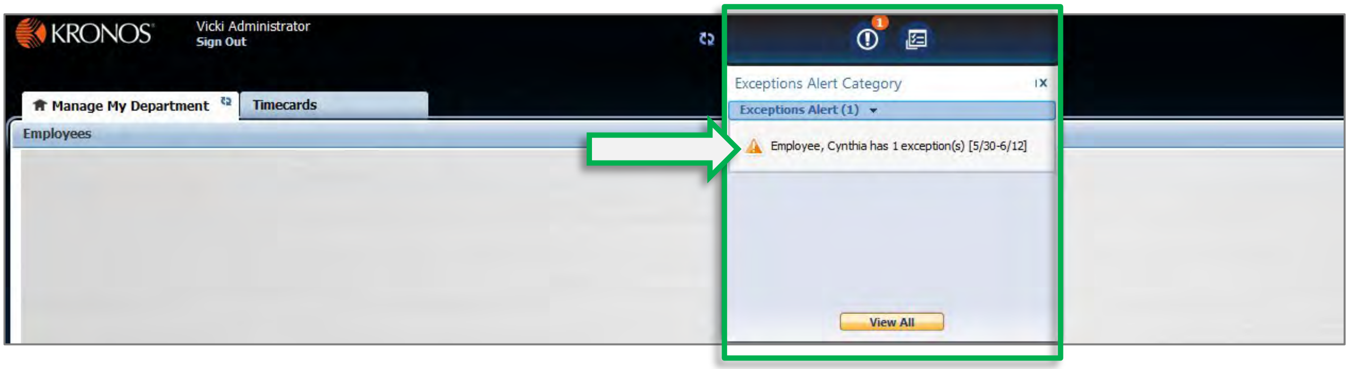
B. Request Alert: Notifies you when an employee assigned to you in TIM submits a Time-Off request, or for TIM Managers, when another manager has submitted a Delegate Authority request to you. TIM Manager's delegation requests will also appear. The number inside of the circle on the icon represents the number of Time Off or Delegate Authority requests that require your attention.

C. Refresh Alerts Icon: After addressing alerts, click the Refresh Alerts Icon to refresh the alerts icons. If either icon still has a number beside it, further action is required. If no number appears, all alerts have been successfully resolved.

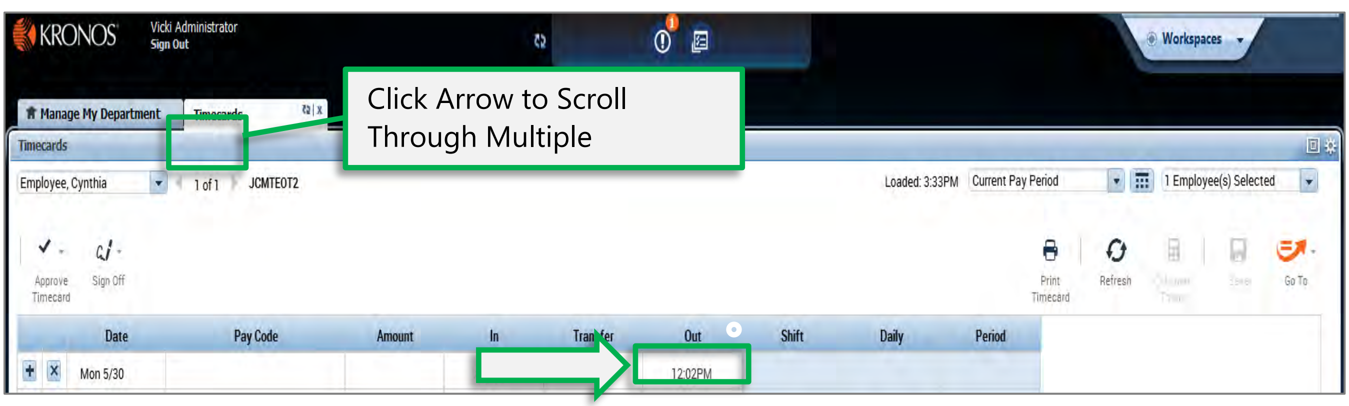
Exceptions Alert

1. If you have an employee with a missed punch, you will notice that the Exceptions Alert Icon has a small orange circle in the top right corner that contains a number. The number represents how many timecards have missed punches that require your attention.

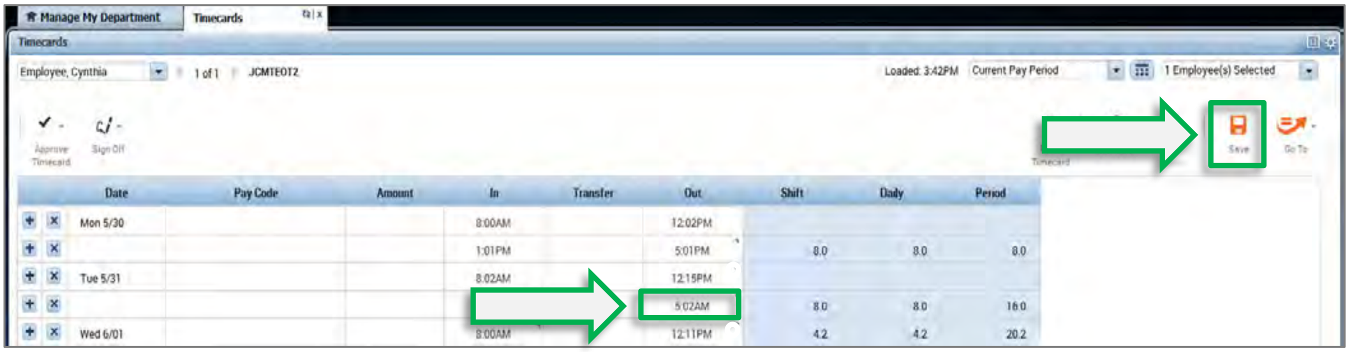
2. The Exceptions Alert Icon will open and display the name of each employee who has a missed punch along with the number of exceptions requiring attention for each employee. Click the individual employee name for the timecard you wish to view or click View All to view all timecards that contain a missed punch.



3. When the employee's timecard appears, the cell where the missed punch took place will be highlighted in red. Click the cell.
   - If you clicked View All on the previous dropdown menu to view more than one timecard at a time, click the right pointing arrow to scroll through the timecards.

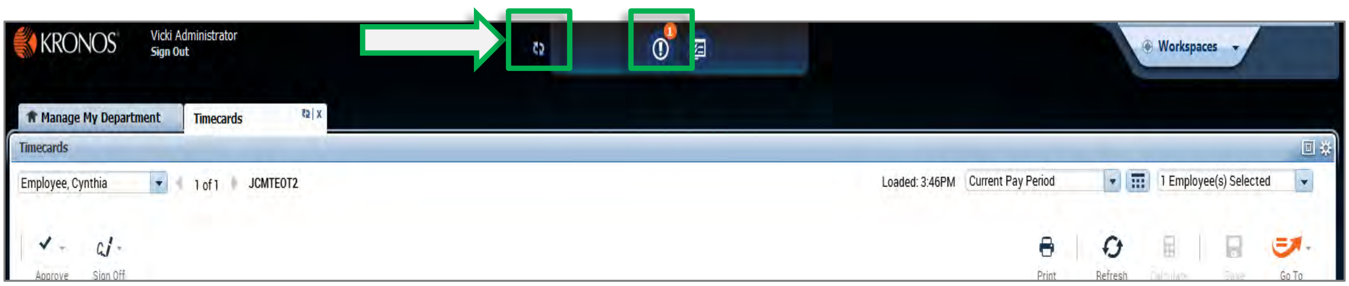


4. Enter the time for the missed punch and click Save.

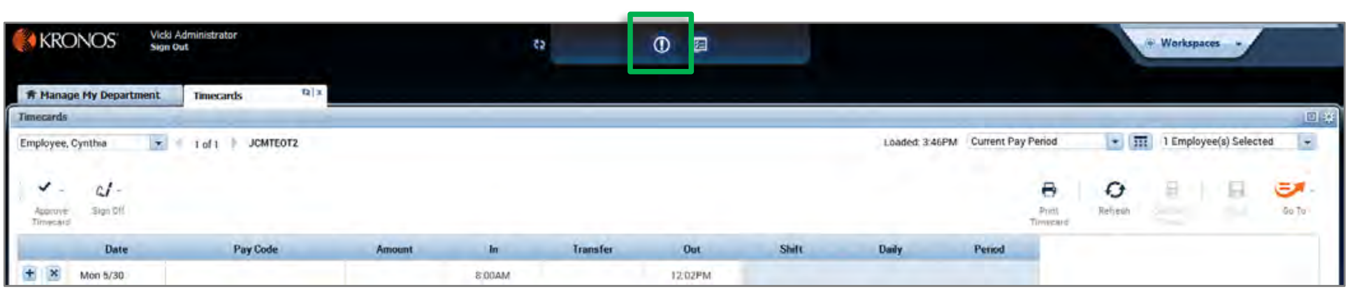


5. After you have successfully resolved all missed punches, click the Refresh Alerts icon. The orange circle in the top right of the Exceptions Alert icon should disappear.

Before clicking Refresh Alerts icon:



After clicking Refresh Alerts icon:



Request Alert

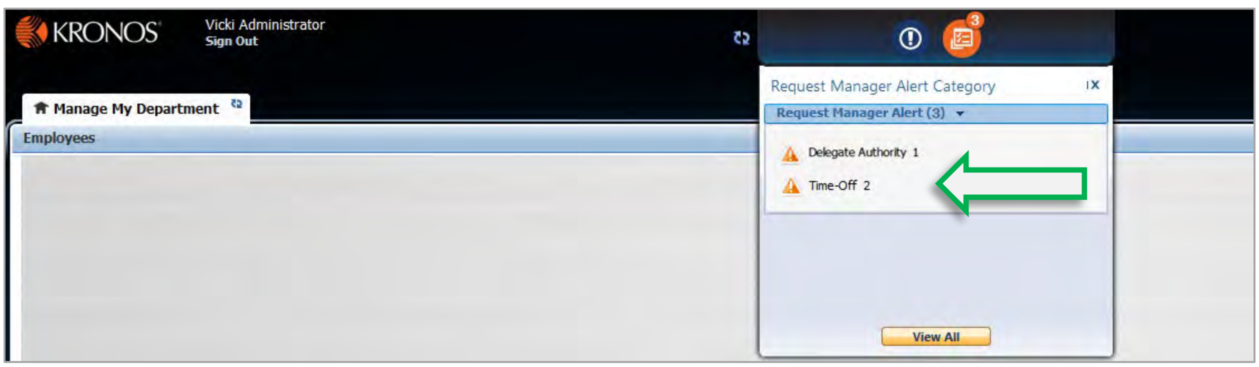
There are two types of Request Alerts:

- **Time-Off requests.** Indicates that an employee assigned to you in TIM has submitted a Time Off Notification Request.
- **Delegate Authority requests** (TIM managers only). Indicates that another manager has submitted a request for you to perform the TIM manager role for the employees assigned to them in TIM while they are away from the office.

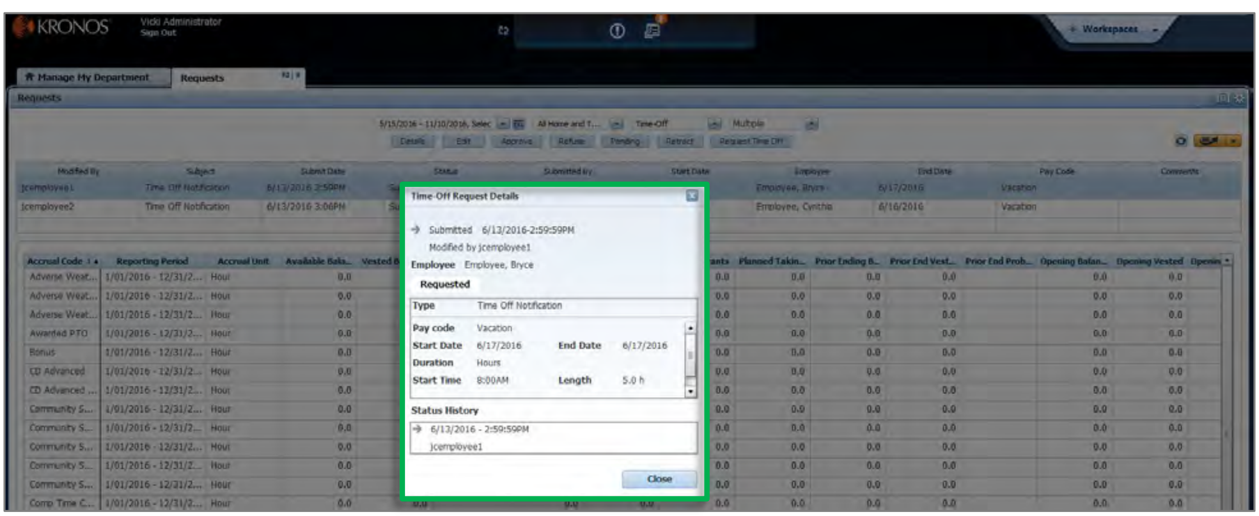
A small orange circle will appear in the top right of the Request Alert Icon when you receive either of these types of requests. The number inside of the circle represents the combined total of Time Off and Delegate Authority requests that require your attention.

Reviewing Time-Off requests

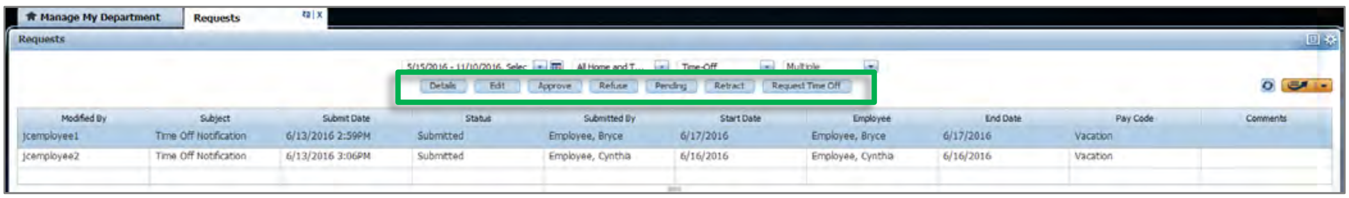
1. Click the Request Alert Icon and then click Time-Off to view the Time Off Notification Requests that require your attention.



2. Click an employee on the list and then click Details to view the Time-Off Request Details that he or she submitted.



3. After reviewing the time off request details, you can choose from the following options at the top of the screen:
    - Approve: Approves the Time Off Notification Request
    - Refuse: Refuses the Time Off Notification Request
    - Pending: Awaiting your review and processing
    - Retract: Employee requested removal of request
    - Request Time Off: Allows you to submit a new Time Off Notification Request on behalf of one of your employees. However, it is easier to just enter the hours of leave taken directly into their timecards.



4. The employee will receive an email notifying him or her of your decision

Reviewing Delegate Authority requests

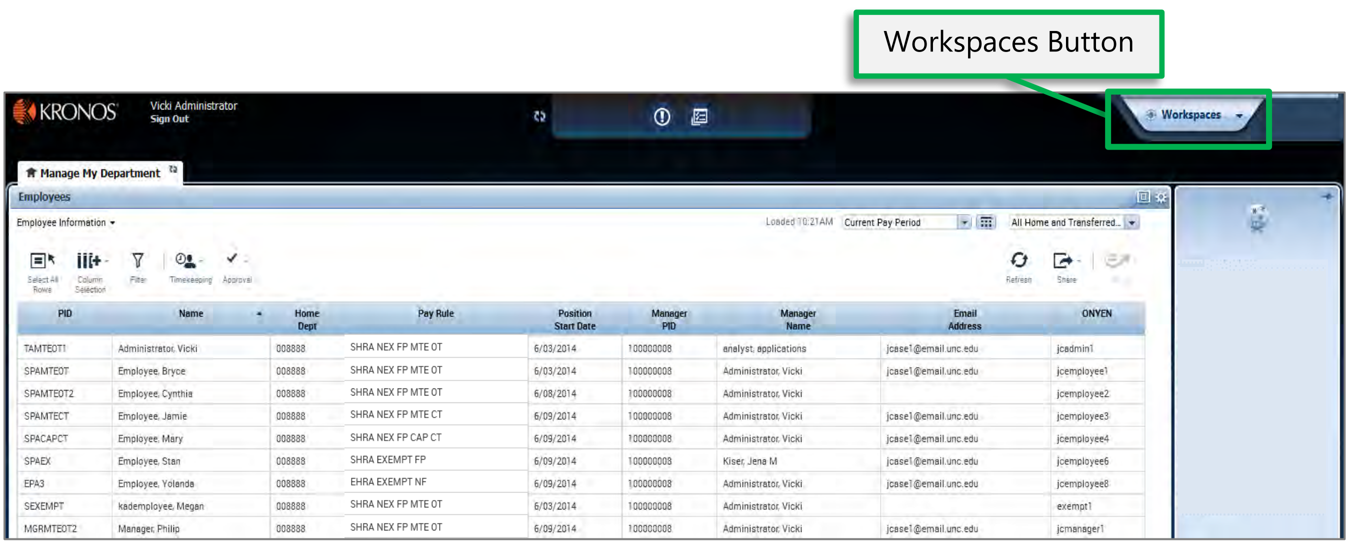
See Delegate Authority (TIM Managers Only) on page 70 for details on delegating authority and reviewing Delegate Authority requests.

Workspaces Button

As a TIM Manager or TIM Administrator you will have a Workspaces Button in the top right of the screen in TIM.

The Workspaces Button allows you to access the following:

1. Your Timecard
2. My Related Items: We recommend that you do **not** use these widget buttons. Instead access Widgets by using the **Go To Icon** because the Widget Buttons automatically include **all** of your employees when opening a Widget can often takes a great deal of time.
    - This is particularly important when opening the Schedules Widget and the Reports Widget as both can take a great deal of time to open for **all** of your employees.
    - Managers can select 'Delegate Authority Request' from the list to submit a manager delegation request.



Navigating Timecards

Opening Timecards

To access Timecards:

1. Double click on the employee in your list to open their timecard.

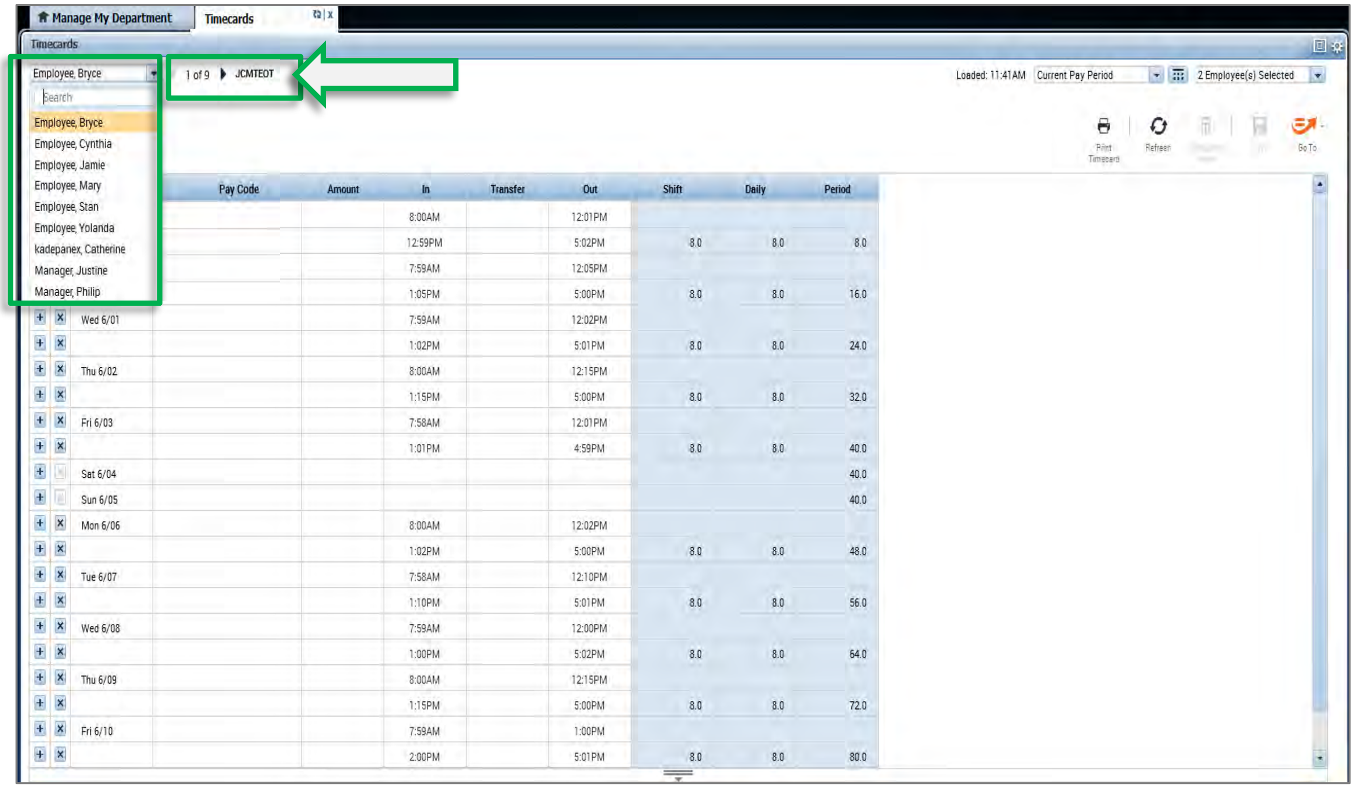
You also have the option of selecting more than one employee at a time if you wish to view timecards for multiple employees.

2. To select more than one employee, hold down the Ctrl key and click each of the employees you wish to select.

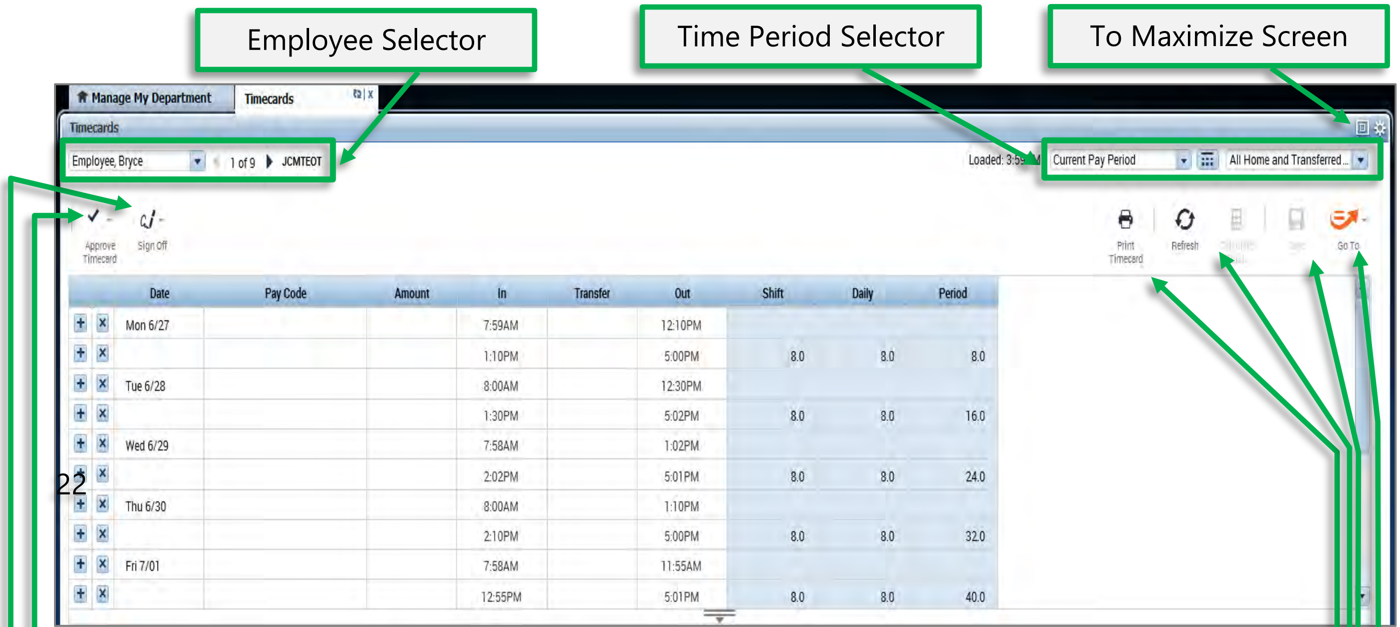
3. Next, click the Go To Icon and select Timecards.

4. Timecards will appear individually for each of the employees that you selected. The name of the employee whose timecard is displayed will appear in the top left of the Timecard Tab.

5. You can click the dropdown arrow to the right of the employee's name to select an employee by name or you can scroll to the next employee's timecard by clicking the arrow pointing to the right.



Timecards Features



Approve Timecard Icon: Allows you to approve the timecard displayed on the screen. Timecard approvals cannot be removed but TIM Managers and TIM Administrators can edit timecards after they have been approved up until they are signed off.

Sign Off Icon: Allows you to sign off on the timecard displayed on the screen. Sign Off removal requests must be emailed to **timsupport@unc.edu** by 4pm on the Tuesday after the Pay Period has ended. This feature is for TIM Administrators only.

Print Timecard Icon: Allows you to print the timecard displayed on the screen.

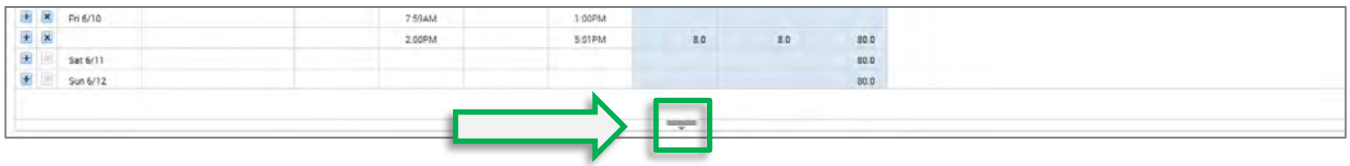
Refresh Icon: If you made edits that you want to remove from the timecard, click the Refresh Icon and select Yes. Also, click the Refresh Icon if you change the time period and it does not automatically appear in the timecard.

Save Icon: After you make an edit to a timecard, the Save Icon will turn orange. Click the Save Icon to save your changes.

Go To Icon: Allows you to utilize a variety of widgets for the employee(s) that you have highlighted on the screen. You can select multiple employees at a time if necessary. Once you have highlighted the employee(s), click Go To Icon to display the drop down menu. Then, select the widget that you want to utilize for the employee(s) selected. See the “Using the Go To Icon” section on page 20 for more information.

Show Timecard Tabs

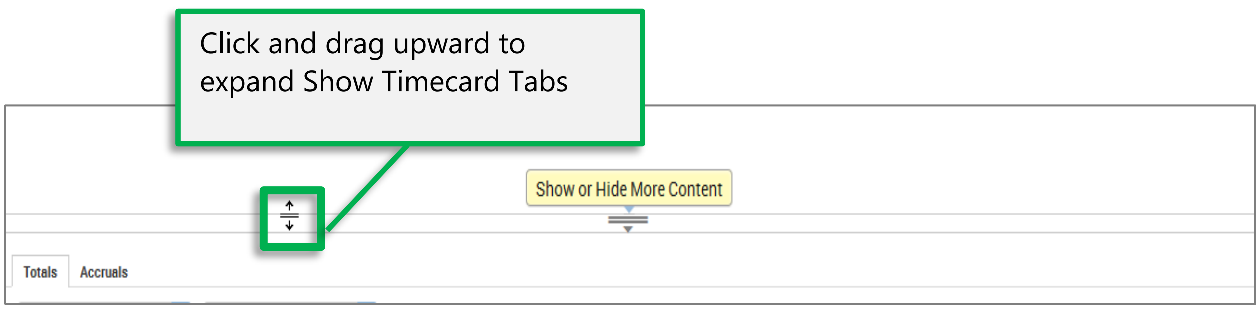
At the end of each timecard, you can click the Show Timecard Tabs icon at the bottom of the screen to view Totals and Accruals for the employee displayed. All employees have access to this icon on their timecards as well.



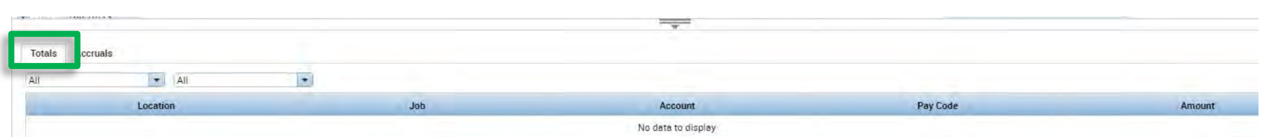
After you click the Show Timecard Tabs icon, you can view the Totals Tab and the Accruals Tab

To expand the Totals tab in order to display more information, hover your mouse over the row that contains the Show Timecard Tabs icon until the Show or Hide More Content cursor appears.

Once the cursor appears, click and drag the row that contains the Show Timecard Tabs icon upward to expand the Show Timecard Tabs.

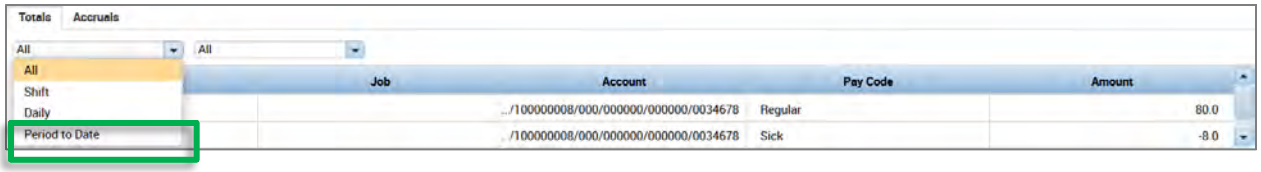


Totals Tab



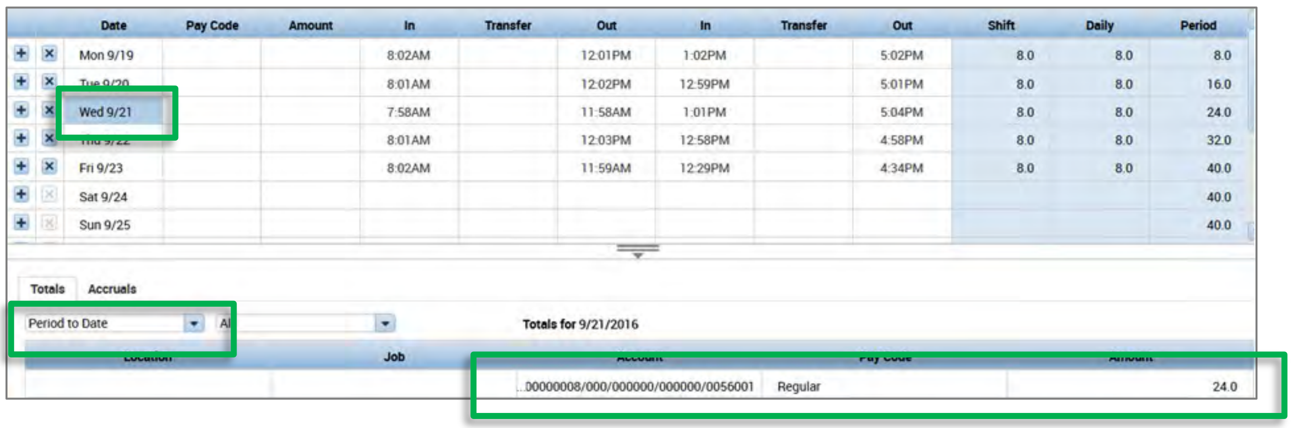
The Totals Tab shows you all of the hours to be processed and sent to payroll within the Current Pay Period.

While the Totals Tab defaults to the All view that shows all of the hours to be sent to payroll, you can also select a date in the "Period to Date" in the dropdown.



Period to Date shows the cumulative hours as of the date selected in the timecard.

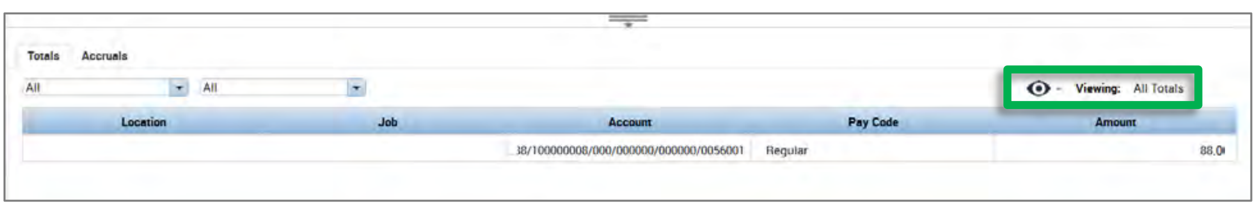
For example, if we selected Wednesday, 9/21 the Totals Tab shows that the employee worked a total of 24 hours Regular from Monday, 9/19 through Wednesday, 9/21



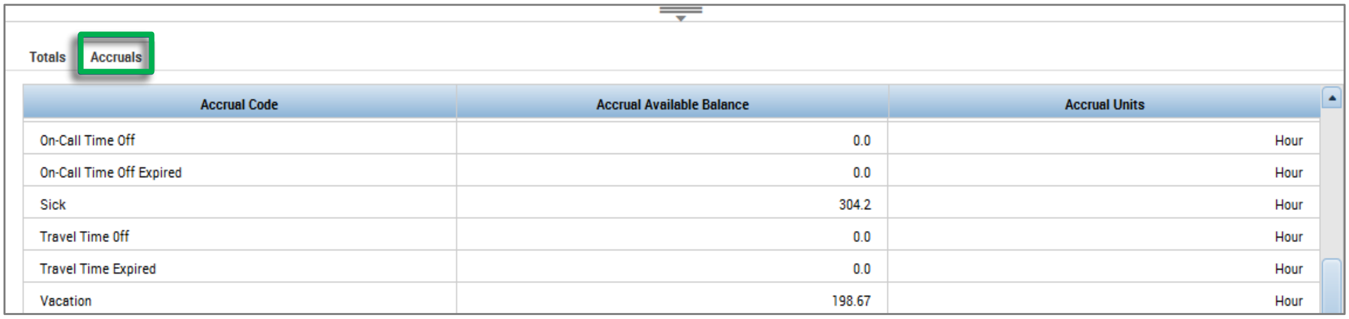
Change the view back to "All" again to see all of the hours that will be sent to payroll for that pay period.

Eye Icon in the Totals Tab

If the totals for the selected pay period include hours from a Historical Correction, an eye icon will appear on the right of the Totals tab.



Accruals Tab



Accrual Code	Accrual Available Balance	Accrual Units
On-Call Time Off	0.0	Hour
On-Call Time Off Expired	0.0	Hour
Sick	304.2	Hour
Travel Time Off	0.0	Hour
Travel Time Expired	0.0	Hour
Vacation	198.67	Hour

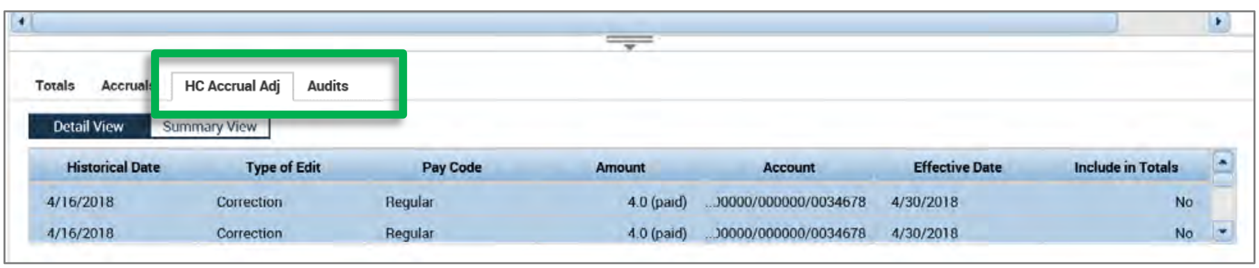
Accrual balances are shown as of the date selected in the timecard.

You must click on a date in the timecard after the leave was taken in order to see the change reflected in the Accruals tab.

HC Accrual Adj and Audits Tabs (TIM Administrators Only)

As of the July 2018 update, TIM Administrators now have quick access to Historical Corrections Accrual Adjustments and Audits information on timecard tabs.

- The HC Accrual Adj tab is used to adjust Historical Corrections with leave hours so the hours are not sent to payroll and do not affect the upcoming paycheck. Most historical corrections **should be sent to Payroll**, so this tab is used for leave balance adjustments only.
- The Audits tab provides easier access to the information in the Audits Widget.



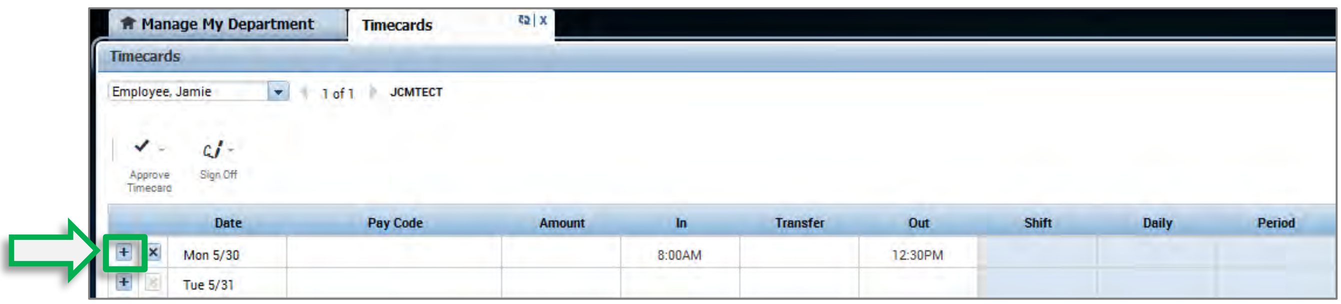
Historical Date	Type of Edit	Pay Code	Amount	Account	Effective Date	Include in Totals
4/16/2018	Correction	Regular	4.0 (paid)	...00000/000000/0034678	4/30/2018	No
4/16/2018	Correction	Regular	4.0 (paid)	...00000/000000/0034678	4/30/2018	No

Employee Timecard Features

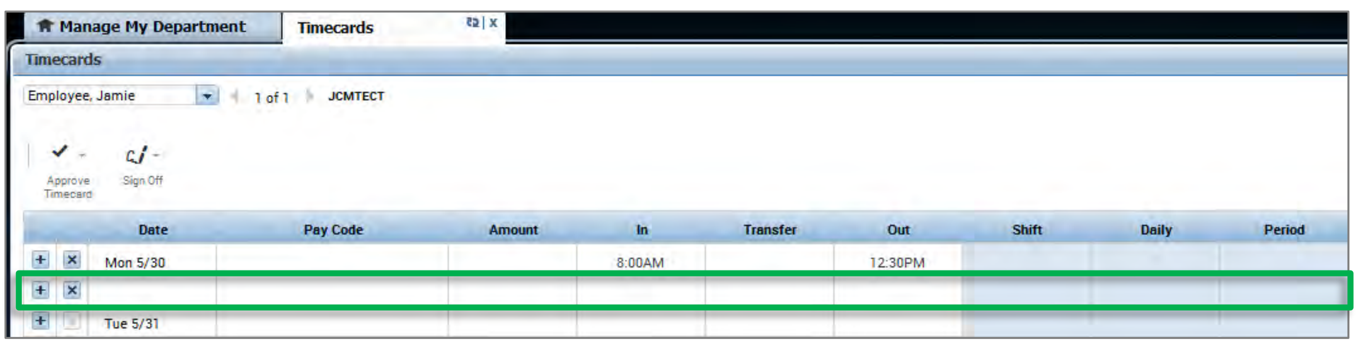
Adding or Deleting a Row

1. To add a row in an employee timecard in order to enter leave or enter time worked in a secondary position on the same day click the + icon on the left side of the row for the date that you want to modify.

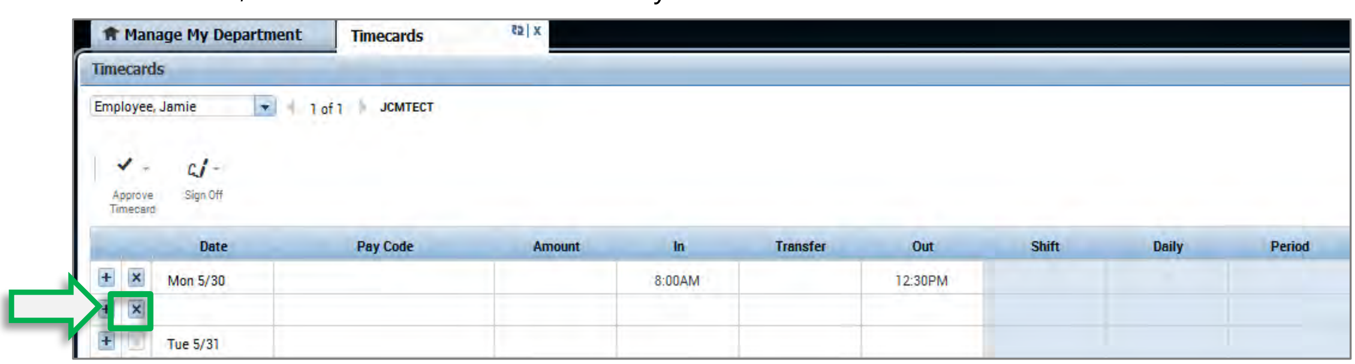
Before:



After:



2. To delete a row, click the X icon in the row that you want to delete.

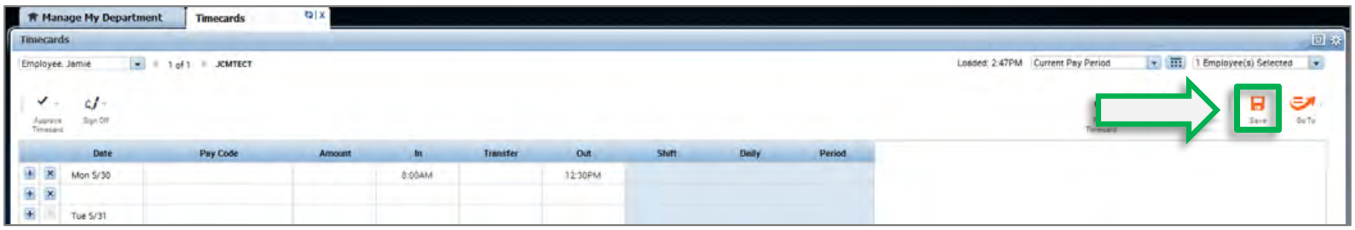


Save Icon

The Save Icon in the top right of the screen will turn orange after you make an edit to the timecard.

Click the Save Icon to save your work and the icon will return to its original grey color.

It is a good idea to click the Save Icon after each edit that you make in an employee's timecard.



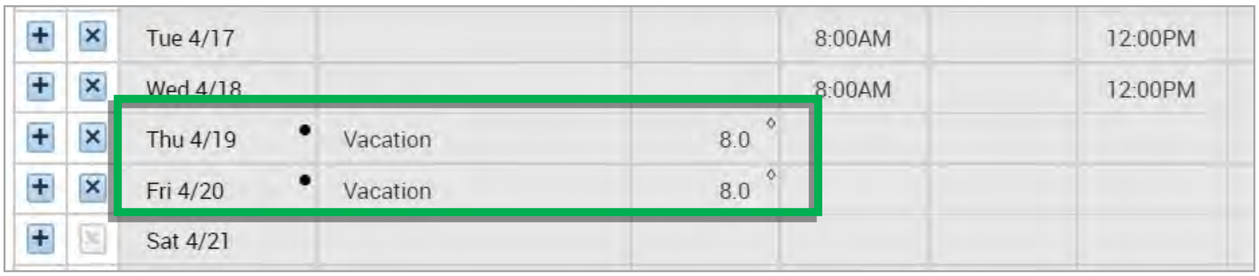
Manager Edit Indicator

If a TIM Manager or TIM Administrator edits a timecard **before** pay period close, a **small triangle** will appear in the top right corner of the cell in which the edit was made.

Historical Correction Indicators

If a correction is needed **after** the pay period closes, an authorized TIM Administrator makes the correction(s) as Historical Corrections, and TIM adds the following Historical Correction indicators to the timecard:

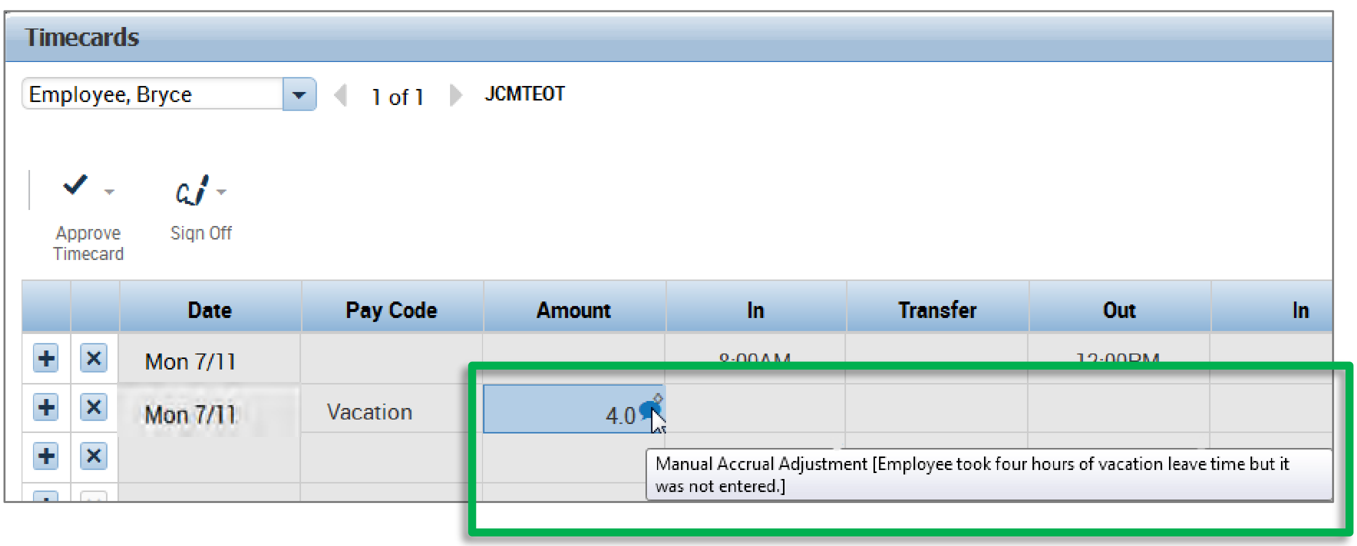
- A **diamond** in each cell that has been corrected historically.
- A prominent **black dot** indicates that the data on that date was corrected. This is a new feature in July 2018. It also appears beside a date when all of the information on that date in the timecard was deleted historically.



Comment Indicator

When editing an employee's timecard, the TIM Manager or Administrator has the option to add a comment in the Amount cell. A **blue bubble** in the cell indicates that a comment has been added.

Hover your mouse over the bubble to read the comment and note



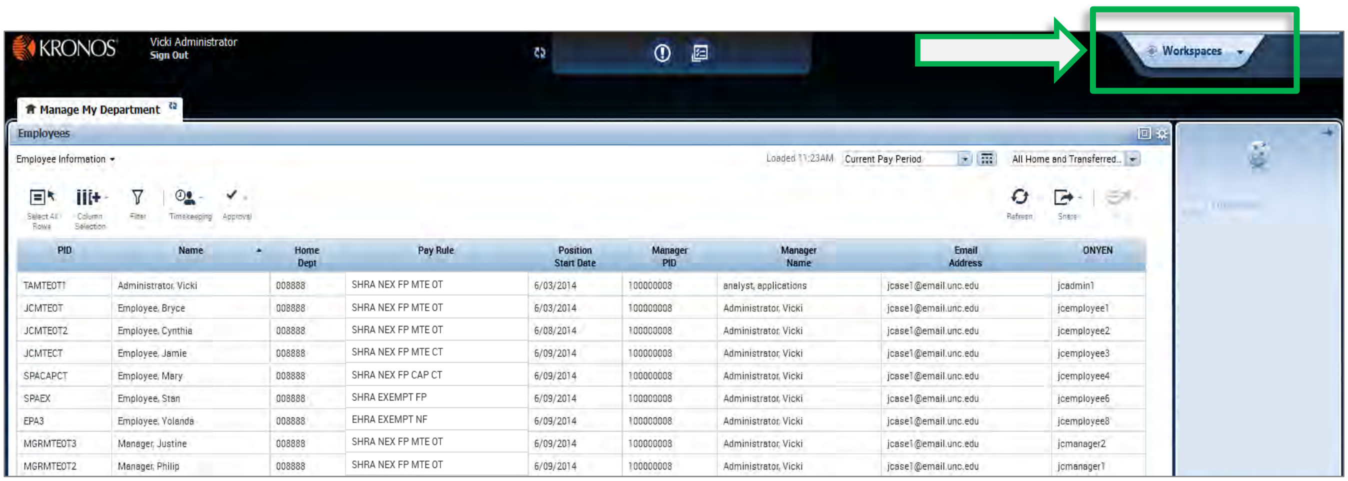
Accessing Your Timecard

As a TIM Administrator, you will need to view, edit, and approve your own timecard.

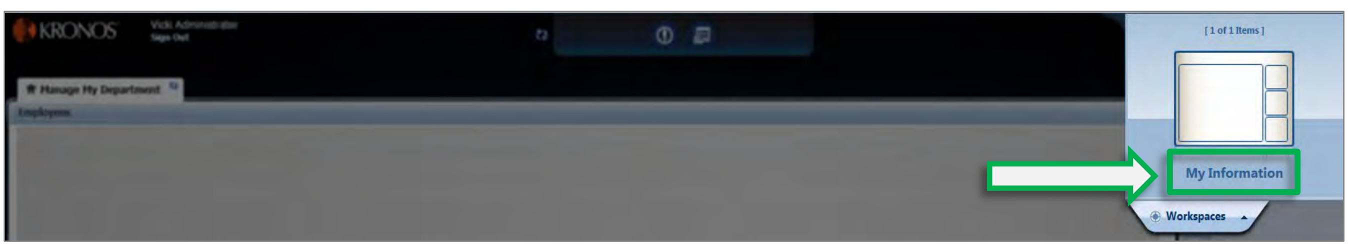
Opening Your Timecard

1. Log in to TIM and click Workspaces in the top right of the screen.

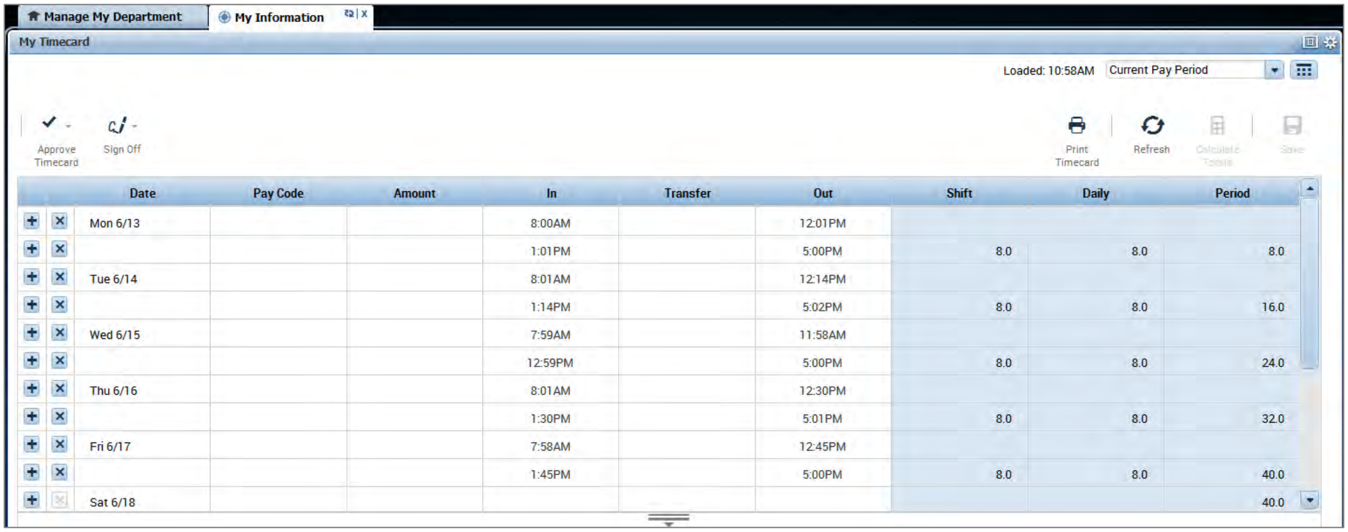
   As a TIM Manager or TIM Administrator, you are not able to open your timecard in the Employee Information list.



2. Click My Information.



3. Your timecard will be displayed on the screen.



❖ All Managers and TIM Administrators are **required** to review the employee CBT that corresponds with their employee type and to follow the instructions in their employee CBT or manual when editing their timecards in TIM.

Editing Timecards

TIM Pay Codes

The following table defines the key pay codes in TIM.

When using these pay codes the number of hours is usually entered as a positive amount. There are a few situations noted below in which TIM administrators will need to enter hours as a negative number.

- ❖ This occurs because certain pay codes, such as Vacation, are used both to designate vacation time used (or "taken") by the employee and vacation accrual granted (or "earned").
- ❖ The most common situations that require hours to be added as negative amounts are described in the Historical Corrections and Terminations chapters.

Pay Code	Description	Used by:		
		Emp	Mgr	TA
Adverse Weather Cond II Owed	• If allowed, an employee may be granted leave hours during an Adverse Weather Condition II. Those hours must be paid back within 90 days. • Adds amount to Adverse Weather Cond II Owed balance.		x	x
Adverse Weather Cond II Paybk	• Entered in the timecard instead of hours worked when additional hours were worked to payback Adverse Weather amount owed. • Adds hours into the Adverse Weather Repaid accrual and one day later, those hours move into Adverse Weather Expired accrual in TIM.			x
Adverse Weather Paybk-AW ETO	• Used to payback Adverse Weather amount owed. • Deducts amount from Adverse Weather ETO balance.			x
Adverse Weather Paybk-Award PTO	• Used to payback Adverse Weather amount owed. • Deducts amount from Awarded PTO balance.			x
Adverse Weather Paybk-Bonus	• Used to payback Adverse Weather amount owed. • Deducts amount from Bonus balance.			x
Adverse Weather Paybk-Bonus 2017	• Used to payback Adverse Weather amount owed. • Deducts amount from Bonus 2017 balance.			x
Adverse Weather Paybk-Bonus 2018	• Used to payback Adverse Weather amount owed. • Deducts amount from Bonus 2018 balance.			x

Pay Code	Description	Used by:		
		Emp	Mgr	TA
Adverse Weather Paybk-Comp Time	• Used to payback Adverse Weather amount owed. • Deducts amount from Compensatory Time balance.			X
Adverse Weather Paybk-HOL ETO	• Used to payback Adverse Weather amount owed. • Deducts amount from Holiday ETO balance.			X
Adverse Weather Paybk-OCTO	• Used to payback Adverse Weather amount owed. • Deducts amount from On Call Time Off balance.			X
Adverse Weather Paybk-Travel ETO	• Used to payback Adverse Weather amount owed. • Deducts amount from Travel Time ETO balance.			X
Adverse Weather Paybk-Vacation	• Used to payback Adverse Weather amount owed. • Deducts amount from Vacation balance.			X
Adverse Weather ETO Taken	• Paid time off, deducts amount from Adverse Weather ETO balance.		X	X
Adverse Weather III ETO ER Emp	• SHRA Non-Exempt severe weather essential employees required to work during Adverse Weather Condition II or III receive Adverse Weather ETO on an hour-for-hour basis for those hours worked. • Adds hours to Adverse Weather ETO balance.		X	X
Adverse Weather Cond III Closed	• Employees who do not work during Adverse Weather Condition III must be paid at their regular rate.			X
Applied Termination 2017 Bonus	• Used to zero out the Bonus 2017 No Payout leave balance in TIM when an employee terminates. • These hours are not sent to Payroll.			X
Applied Termination 2018 Bonus	• Used to zero out the Bonus 2018 No Payout leave balance in TIM when an employee terminates. • These hours are not sent to Payroll.			X
Applied Termination Bonus	• Used to zero out the Bonus Leave balance in TIM when an employee terminates.			X
Applied Termination Comp Time	• Used to zero out the Comp Time balance in TIM when an employee terminates.			X
Applied Termination Holiday ETO	• Used to zero out the Holiday ETO balance in TIM when an employee terminates.			X

Pay Code	Description	Used by:		
		Emp	Mgr	TA
Applied Termination OCTO	• Used to zero out the On Call Time Off balance in TIM when an employee terminates.			X
Applied Termination Sick	• Used to zero out the Sick balance in TIM when an employee terminates.			X
Applied Termination Travel ETO	• Used to zero out the Travel ETO balance in TIM when an employee terminates.			X
Applied Termination Vacation	• Used to zero out the Vacation balance in TIM when an employee terminates.			X
Awarded PTO Given	• An SHRA employee may receive an award of paid time off. • Adds amount to Awarded PTO balance.			X
Awarded PTO Taken	• Paid Leave Awards must be used within 12 months of receipt of the award, or the leave is forfeited. • Deducts amount from the Awarded PTO balance.	X	X	X
Bonus Leave Taken	• Paid time off, deducts amount from Bonus Leave balance. Note to TIM Administrators: When adding Bonus Leave Taken that a new employee has carried over from previous state service, the hours should be added as a negative amount.	X	X	X
Bonus 2017 Taken	• Paid time off, deducts amount from Bonus 2017 No Payout balance. • These hours do not expire and are not paid out at termination.	X	X	X
Bonus 2018 Taken	• Paid time off, deducts amount from Bonus 2018 No Payout balance. • These hours do not expire and are not paid out at termination. • See August 2, 2018 memo.	X	X	X
Callback Guarantee	• Employees required to return to work shall receive a minimum of two hours paid time for callback at the employee's hourly rate. If the time on callback exceeds two hours, the employee shall be compensated for all hours worked on callback.			X
Civil Leave	• Civil Leave is a form of paid leave at the employee's normal hourly rate to compensate employees for absences required due to jury duty or to subpoenas for court appearances.	X	X	X
Community Serv-Disaster Recovery	• Up to 120 hours of paid leave may be used for participation in designated disaster relief actions. • Deducts amount from Community Service Disaster Recovery Balance.	X	X	X

Pay Code	Description	Used by:		
		Emp	Mgr	TA
Community Service-Blood Donation	• Paid leave for Blood-Related and Bone Marrow Donation donations. There is no defined maximum amount of hours for this leave. • Deducts amount from Community Service Blood Donation Balance.	X	X	X
Community Service Leave Opt A	• This Option provides 24 hours of paid leave for participation in the educational process of children through the high school level and/or to support community service organizations. • Deducts amount from Community Service Option A Balance.	X	X	X
Community Service Leave Opt A HR	• This Option provides 16 hours of paid leave for participation in Hurricane Florence relief efforts. • Deducts amount from Community Service Opt A Hurricane Relief Balance. • Hours expire on December 31, 2018.			X
Community Service Leave Opt B	• An alternative to Option A, this Option provides 36 hours of paid leave for tutoring/mentoring a student in an eligible school. • Deducts amount from Community Service Option B Balance.	X	X	X
Community Service-Organ Donation	• Up to 180 hours of paid leave may be used for organ donor ship.	X	X	X
Comp Time Earned	• Compensatory time is paid time off equal to one-and-one-half times the amount of time worked in excess of 40 hours in a work week. Note to TIM Administrators: The amount is always entered as a positive number.		X	X
Comp Time Taken	• Compensatory time used. • Amount is deducted from the Comp Time balance in TIM. Note to TIM Administrators: The amount is always entered as a positive number.	X	X	X
CT to Paid OT	• Used in conjunction with the CT Used as Pay Out pay code to pay the employee the correct amount of Overtime when changing Comp Time hours to Overtime hours.		X	X
CT Used as Pay Out	• Used in conjunction with the CT to Paid OT pay code to remove the amount of Comp Time earned from the Comp Time Current bank when changing Comp Time hours to Overtime hours		X	X
Expired Comp Time Pay Out	• Used to payout hours in the Comp Time Expired leave balance.			X

Pay Code	Description	Used by:		
		Emp	Mgr	TA
Expired Holiday ETO Pay Out	• Used to payout hours in the Holiday ETO Expired leave balance.			x
Expired Travel Time ETO Pay Out	• Used to payout hours in the Travel Time ETO leave balance.			x
FACULTY Disability	• Faculty member's hours of paid leave for serious illness or major disability.			x
FACULTY-Parental Leave	• Faculty member's hours of paid leave for parental leave.			x
Family Illness LWOP	• Family Illness Leave is provided for an employee to care for the employee's child, parent or spouse where that child, spouse or parent has a serious health condition			x
FMLA PD – AdvW ETO	• Employees may use Adverse Weather ETO Leave for FMLA absences. • Deducts amount from Leave balance.			x
FMLA PD – Bonus	• Employees may use Bonus Leave for FMLA absences from work. • Deducts amount from Bonus Leave balance.			x
FMLA PD – Bonus 2017	• Employees may use Bonus 2017 Leave for FMLA absences from work. • Deducts amount from Leave balance.			x
FMLA PD – Bonus 2018	• Employees may use Bonus 2018 Leave for FMLA absences from work. • Deducts amount from Leave balance.			x
FMLA PD – Comp Time	• Employees may use Comp Time Leave for FMLA absences from work. • Deducts amount from Leave balance.			x
FMLA PD - Shared Leave	• Employees may use Donated Voluntary Shared Leave for FMLA absences from work. • Deducts amount from Shared Leave balance.			x
FMLA PD – Sick	• Employees may use Sick Leave for FMLA absences from work. • Deducts amount from Sick Leave balance.			x
FMLA PD – Vacation	• Employees may use Vacation Leave for FMLA absences from work. • Deducts amount from Vacation Leave balance.			x
FMLA-LWOP	• Employees may use leave without pay for FMLA absences from work.			x

Pay Code	Description	Used by:		
		Emp	Mgr	TA
Holiday	• Paid time off, up to 8 hours (pro-rated for part-time employees) for hours not worked on a University holiday as established on the University Holiday Schedule.		X	X
Holiday ETO Taken	• Holiday ETO time used. • Amount is deducted from the Holiday ETO leave balance in TIM.	X	X	X
Holiday Prem SD	• An employee who is required to work a Shift Differential qualifying shift on a University holiday receives straight pay, shift differential pay, and holiday premium pay for each hour worked. Permanent employees also receive paid time off up to 8 hours (pro-rated for part-time employees) for each hour worked.		X	X
Holiday Premium	• An employee who is required to work on a University holiday receives straight pay and holiday premium pay for each hour worked. Permanent employees also receive paid time off up to 8 hours (pro-rated for part-time employees) for each hour worked.		X	X
Overtime	• Amount over 40 hours in a work week that was worked by a SHRA Non-Exempt employee.		X	X
Overtime SD	• Amount over 40 hours in a work week that was worked by a SHRA Non-Exempt employee in a Shift Differential qualifying shift.		X	X
Regular	• Hours worked by an employee.			X
Regular SD	• Hours worked by an employee during a Shift Differential qualifying shift.			X
Sick	• Paid time off. • Deducts amount from Sick balance. Note to TIM Administrators: When adding sick time to an employee's accrual balance the hours should be added as a negative amount.	X	X	X
Travel Time ETO	• Paid time off earned on a hour-for-hour basis for travel.		X	X
Travel Time Taken	• Travel time earned hours taken. • Amount is deducted from the Travel Time Off balance in TIM.	X	X	X
Vacation	• Paid time off. • Deducts amount from Vacation balance. Note to TIM Administrators: When adding vacation to an employee's accrual balance the hours should be added as a negative amount.	X	X	X

Pay Code	Description	Used by:		
		Emp	Mgr	TA
Vol Shared Leave Donated-BON	• Deducts amount from the shared leave donor's Bonus Leave balance.			x
Vol Shared Leave Donated-SCK	• Deducts amount from the shared leave donor's Sick Leave balance.			x
Vol Shared Leave Donated-VAC	• Deducts amount from the shared leave donor's Vacation Leave balance.			x
Voluntary Shared Leave Received	• Adds amount into the shared leave recipient's Voluntary Shared Leave balance.			x
Voluntary Shared Leave Taken	• Deducts amount used from the shared leave recipient's Voluntary Shared Leave balance.		x	x

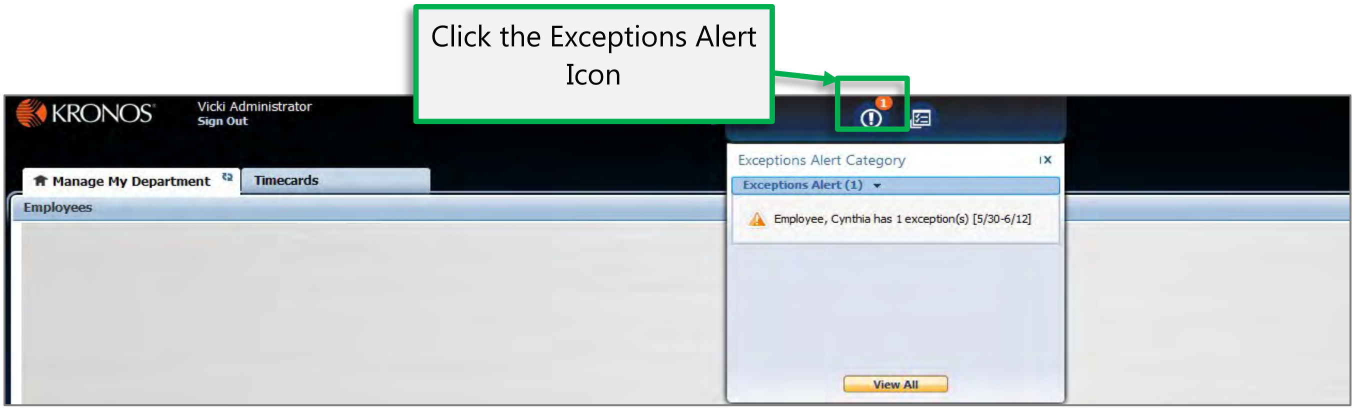
Resolve a Missed Punch

SHRA Non-Exempt Employees set to Manual Time Entry are able to enter time to address missed punches in their timecards. Typically, these employees will notice that they have a missed punch and can enter the time themselves. If not, the TIM Manager or TIM Administrator will need to do this for them.

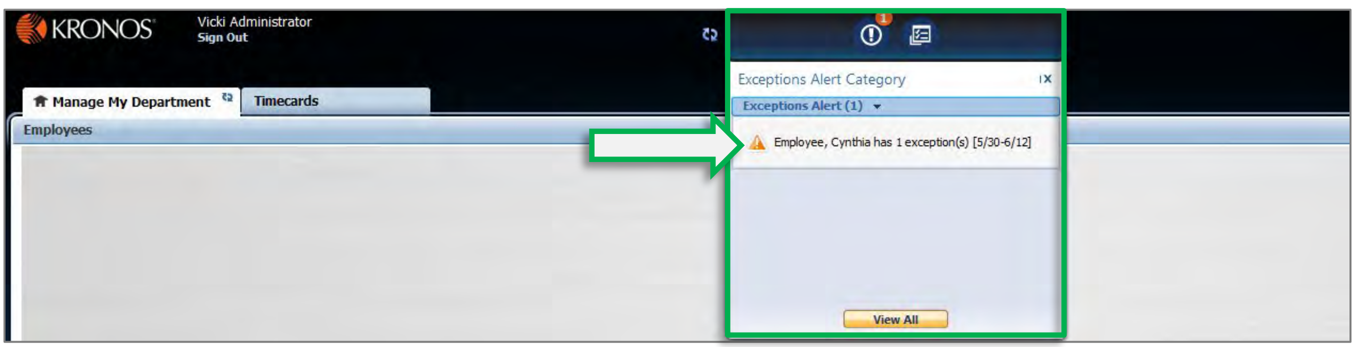
However, SHRA Non-Exempt Employees set to Time Capture, Student Employees, and Temporary Employees are unable to enter time to address a missed punch. Therefore, the TIM Manager or TIM Administrator will need to do this for them.

Steps Required to Resolve a Missed Punch

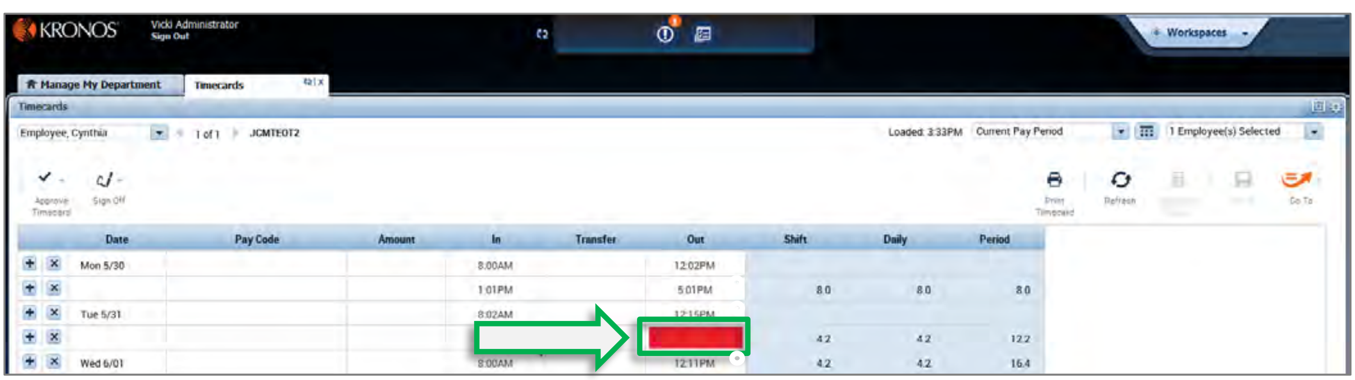
1. If you have an employee with a missed punch, you will notice that the Exceptions Alert Icon has a small orange circle in the top right corner that contains a number. The number represents the number of missed punches that require your attention.



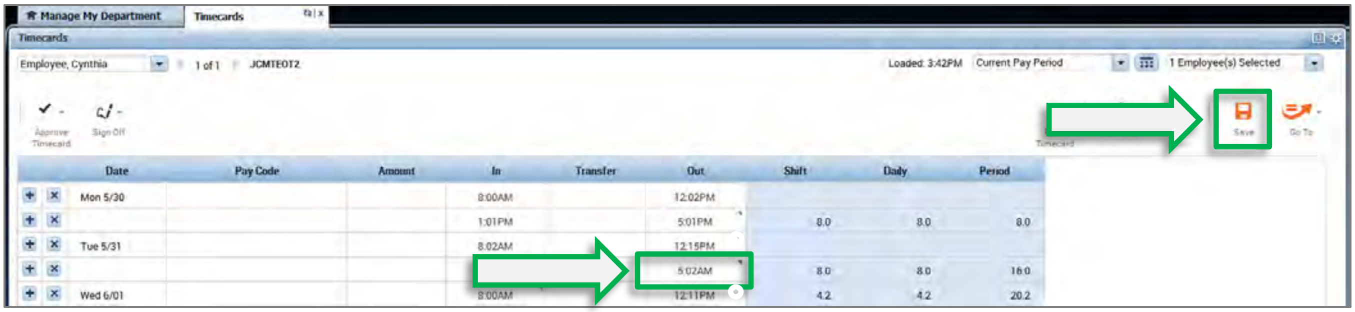
2. The Exceptions Alert Icon will open and display the name of each employee who has a missed punch along with the number of exceptions requiring attention for each employee. Click the name assigned to the individual timecard that you want to view or click View All to view all of the timecards for employees who have missed punches.



3. When the employee's timecard appears, the cell where the missed punch took place will be highlighted in red. Click the cell.

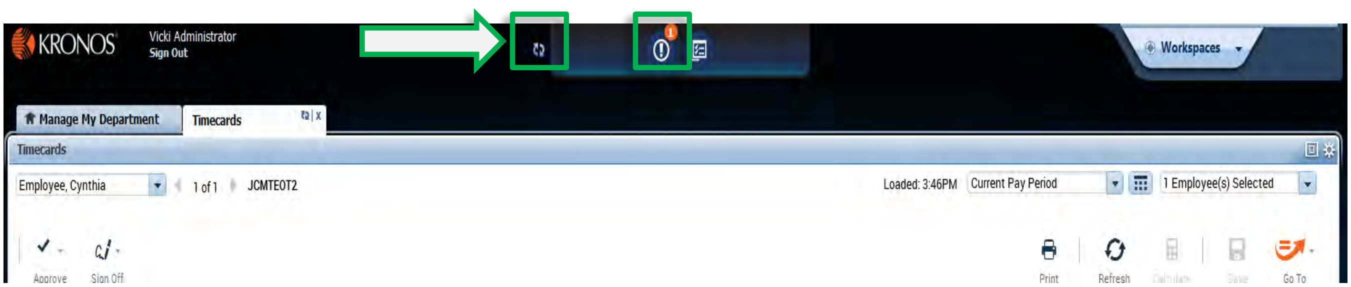


4. Enter the time for the missed punch and click Save.

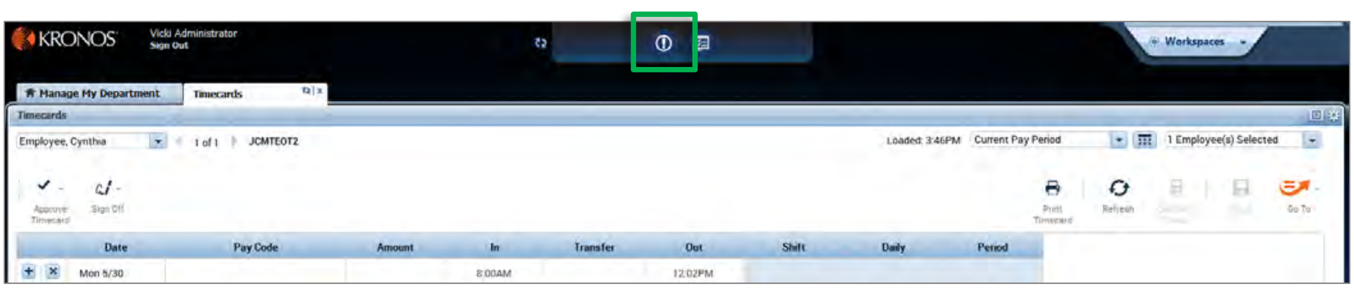


5. After you have successfully resolved all missed punches, click the Refresh Alerts icon. The orange circle in the top right of the Exceptions Alert icon should disappear.

Before clicking Refresh Alerts icon:



After clicking Refresh Alerts icon:



To Enter Hours Worked by an Employee

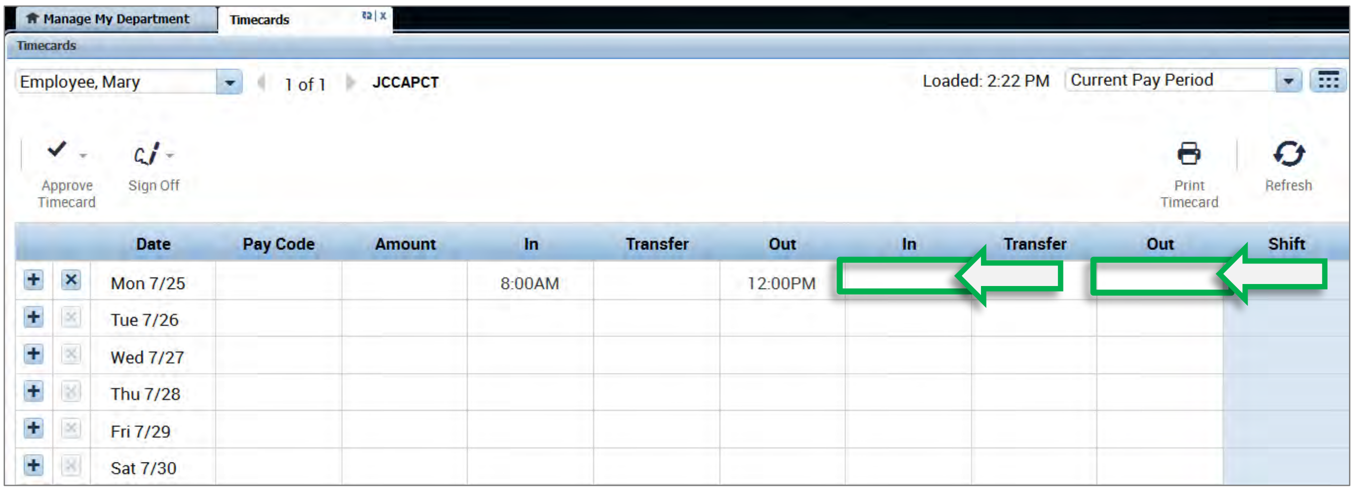
SHRA and EHRA Non-Exempt Employees set to Manual Time Entry are able to enter time that they may have forgotten to enter earlier in the pay period prior to approving their timecards. Typically, these employees will notice that they have forgotten to enter time worked and can enter the time themselves. If not, the TIM Manager or TIM Administrator will need to enter it for them.

However, SHRA Non-Exempt Employees set to Time Capture, Student Employees, and Temporary Employees are unable to enter hours worked if they forget to record a timestamp in or out. Therefore, the TIM Manager or TIM Administrator will need to do this for them.

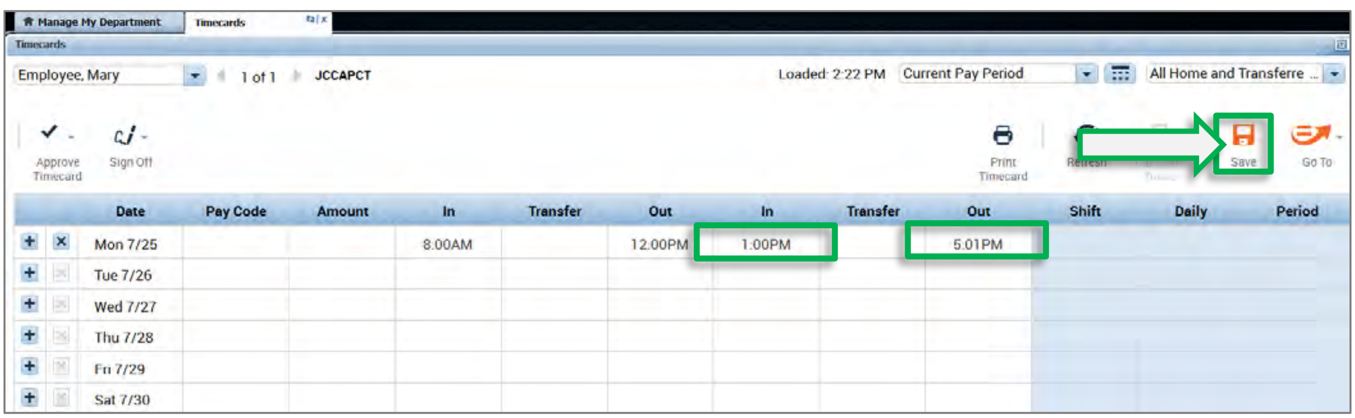
Steps Required to Enter Hours Worked in an Employee Timecard

1. Click the appropriate cells to enter the time for the employee.

   For example, let's say that the employee below forgot to record a timestamp in upon returning from lunch at 1:00pm on Monday, 7/25 as well as a timestamp out upon leaving work at 5:01pm that day.



2. Enter the times in and out in the appropriate cells and click Save.



Transfer a Shift Worked to a Secondary Position

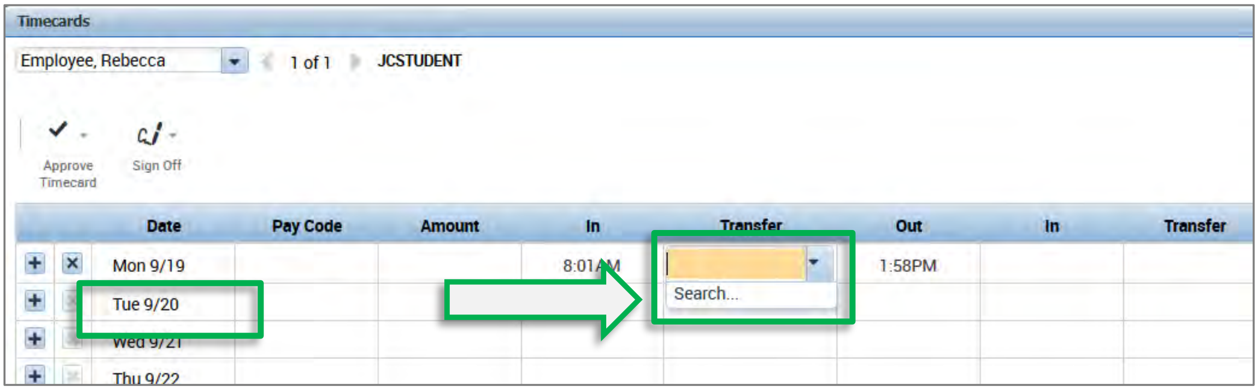
Sometimes SHRA Students and Temporary employees with multiple positions forget to transfer to their secondary position when performing a timestamp in.

If this occurs, you will need to transfer the shift in the employee's timecards.

To Transfer a Shift Worked to a Secondary Position

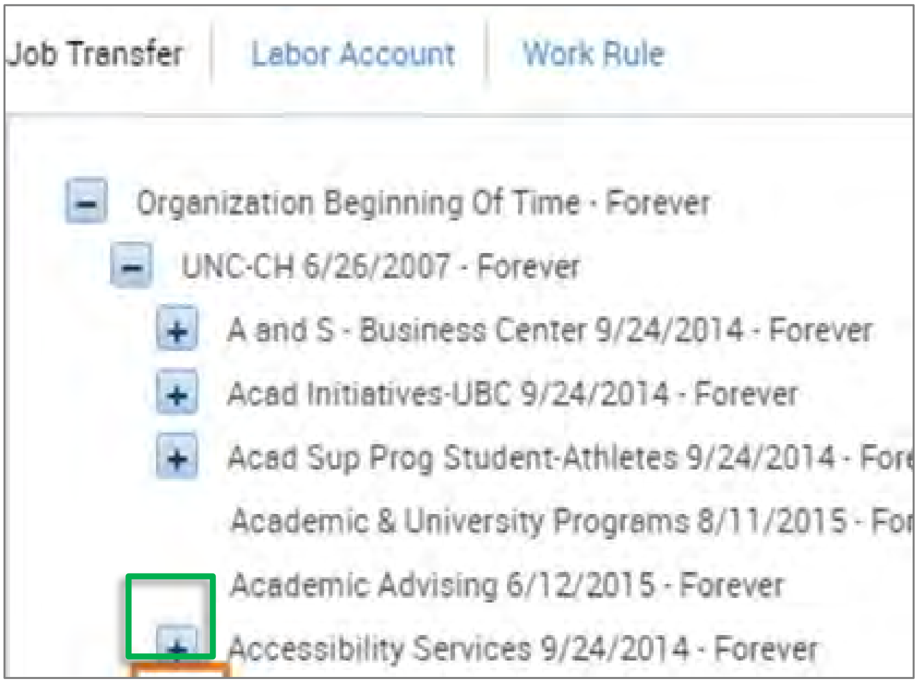
1. In the employee's timecard, locate the date that the transfer should have occurred on.

   Click the cell in the Transfer column and click Search.

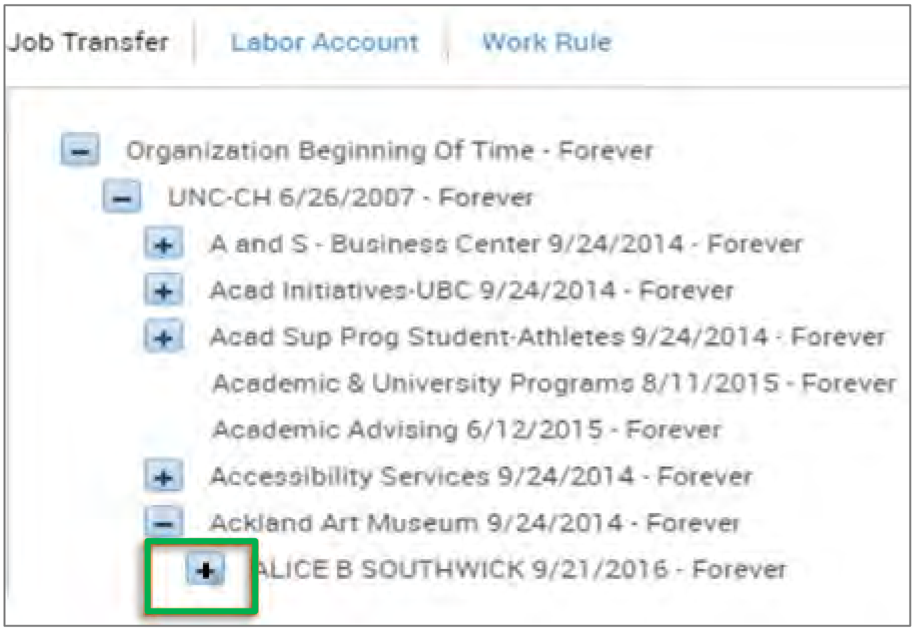


2. Click the plus sign to the left of UNC-CH

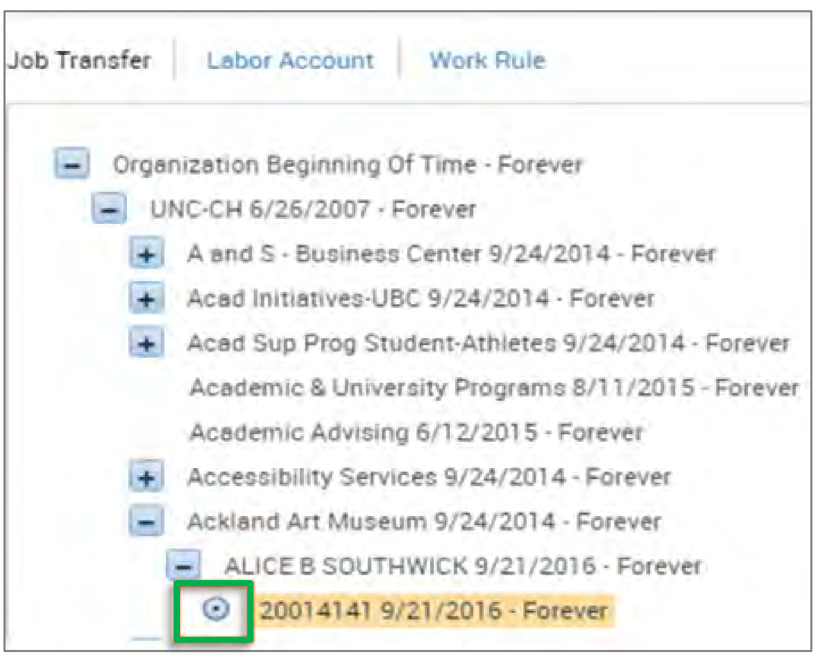
3. Click the plus sign beside the department name that the position is assigned to.



4. Click the plus sign beside the manager's name that the position reports to.

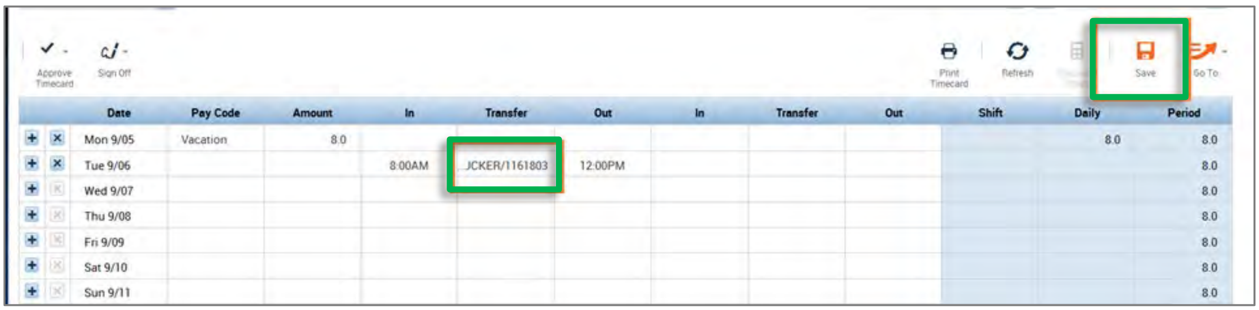


5. Click the button beside the employee's position number.
   IMPORTANT: As the Manager or TIM Administrator, you have access to all of the positions in your department or that report to you. Please make sure you select only the position that is assigned to that employee in ConnectCarolina.



6. Click Apply.

7. The position will then be displayed in the Transfer column. Click Save.



If you need to view the position description in its entirety, click the vertical line in between the Transfer column and the Out column and drag to the right to expand the column.

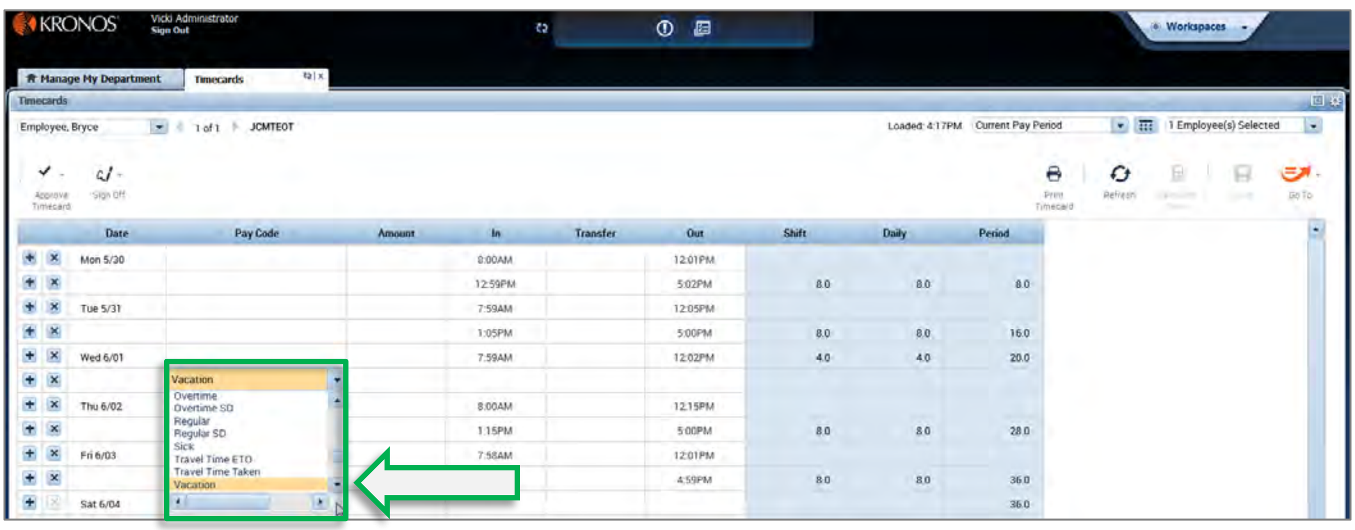
Enter Leave Taken on a Day that Hours were Worked

If a SHRA or EHRA permanent employee forgets to enter leave taken on a day that he or she also worked, you will need to add an additional row in order to enter the leave taken.

Steps Required to Enter Leave Taken on a Day that Hours were Worked

1. Find the row for the date on which leave was taken and click the + icon on the left side of the screen to add another row.

2. After the row has been added, click the cell in the Pay Code column for that day in the new row and select the appropriate Pay Code for the leave taken.



3. Enter the amount of leave taken in the cell in the Amount column in the new row. Then click Save.

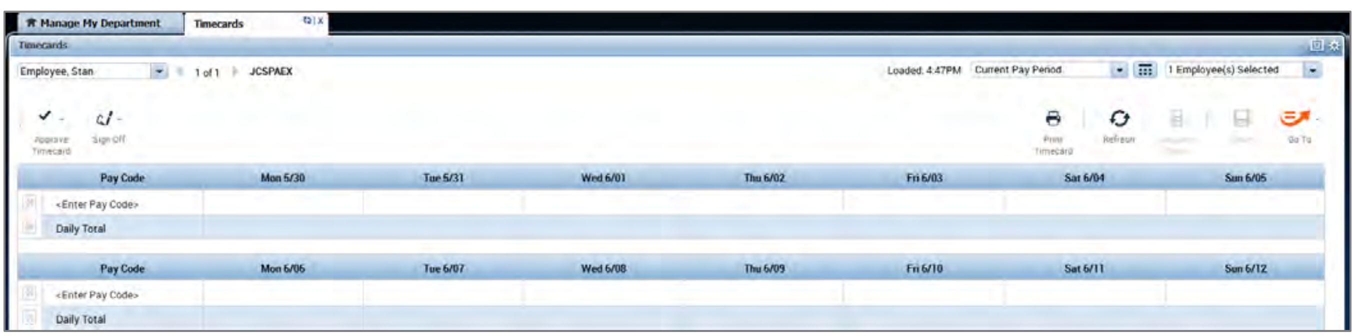
> ❖ You must click on a date in the timecard after the leave was taken in order to see the change reflected in the Accruals tab.

SHRA and EHRA Exempt Employee Timecards

Exempt employees do not enter hours worked into their timecards, only leave taken.

The timecards for SHRA Exempt Employees and EHRA Exempt Employees will have the exact same functionality. The only difference is that the timecard for SHRA Exempt Employees will display two weeks because their pay period is two weeks long. The timecard for EHRA Exempt Employees will display four or five weeks because their pay period consists of the entire month.

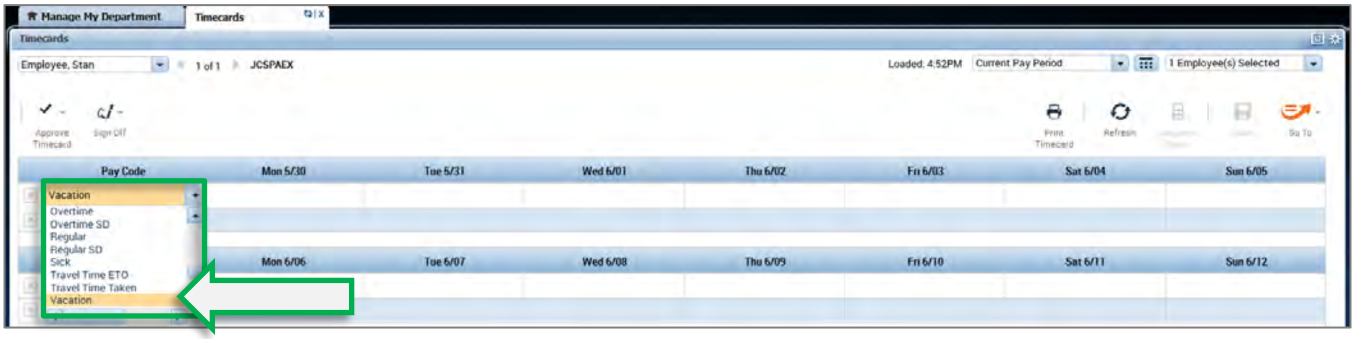
SHRA Exempt Employee Timecard:



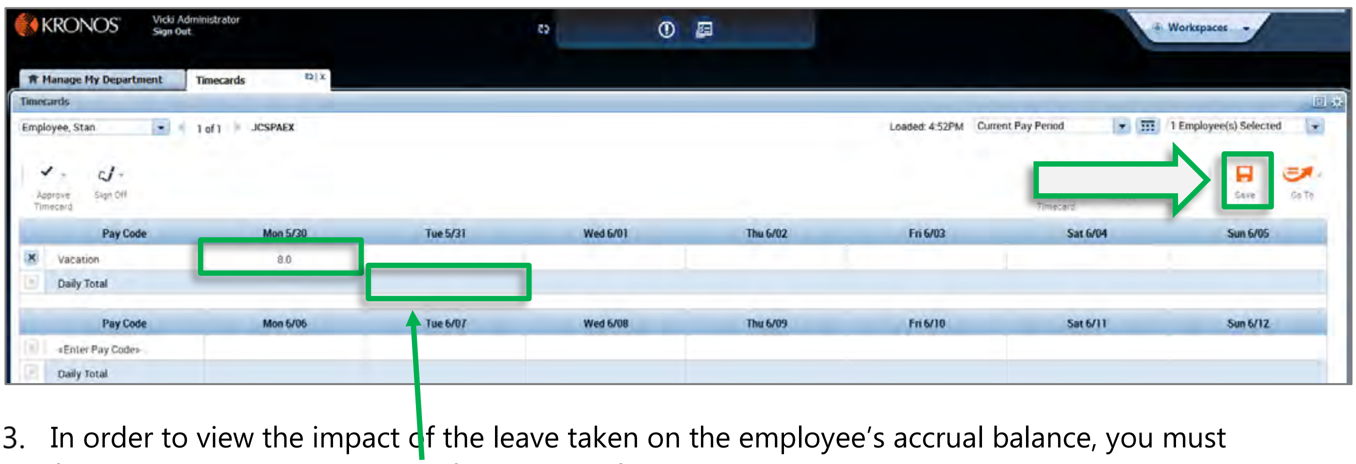
EHRA Exempt Employee Timecard:

Entering Leave Taken for Exempt Employees

1. To enter leave taken for an SHRA or EHRA Exempt Employee, identify the week that the leave was taken and click <Enter Pay Code> to select the appropriate pay code.



2. Enter the amount of leave taken on the same row under the column for the date that leave was taken. Click Save.



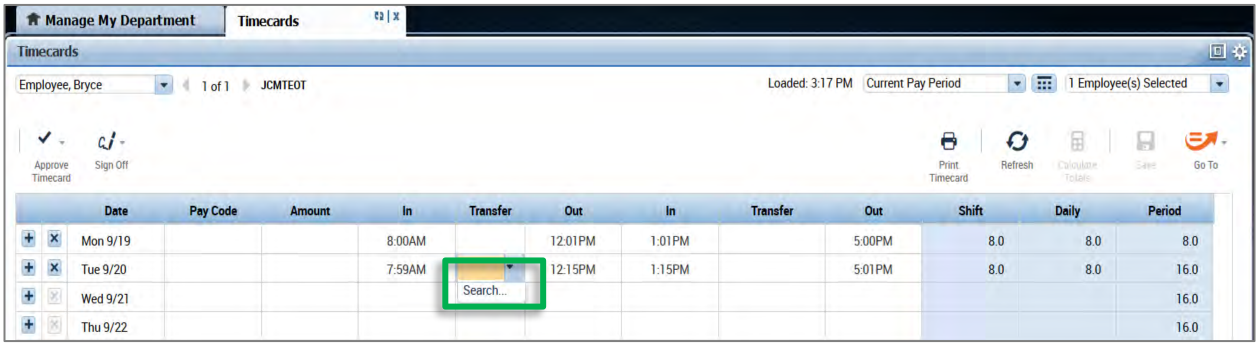
3. In order to view the impact of the leave taken on the employee's accrual balance, you must first click in the Daily Total cell for the day after the leave was taken.

Transferring Hours Worked to a Special Account

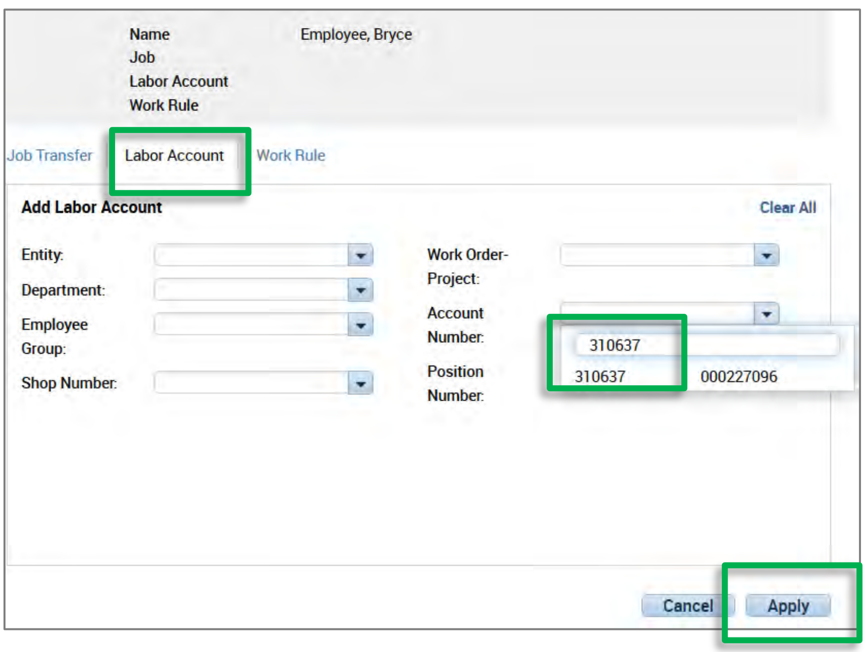
When an employee works a special athletic event or needs their Overtime hours charged to a different source account because the grant account will not allow overtime hours, the shift worked my need to be transferred to an account code in TIM.

To Complete an Account Transfer

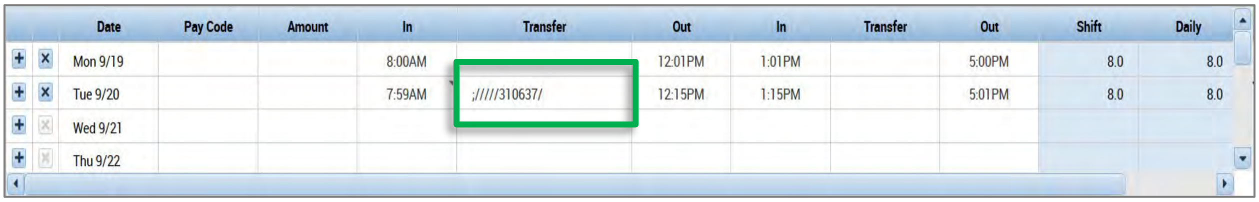
1. In the employee's timecard, locate the date that requires an account transfer.
   - Click the Transfer cell located between the In and Out columns for the hours worked that need to be transferred.
   - Then, click Search.



2. Click Labor Account and enter the new account number in the Account Number field.
   Be sure to select the account number when it appears in the search results. Then, click Apply.



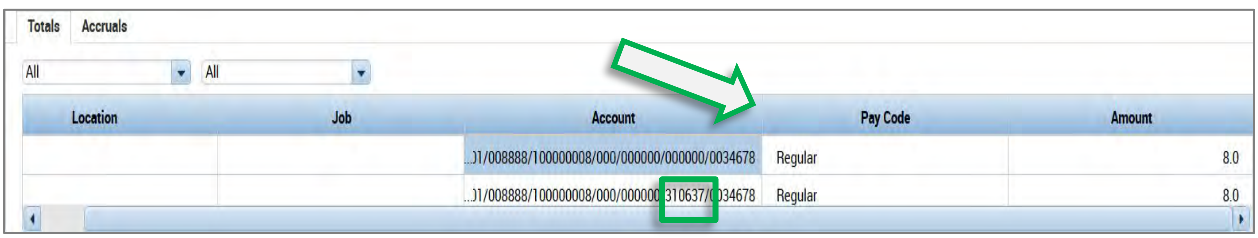
3. Click Save.



After you click Save, the new account number will be displayed in the Transfer column.

The change will also appear in the Account column in the Totals Tab. To view, Click the Show Timecard Tabs icon and click the space between the Account column and the Pay Code column and drag to widen the Account column.

There will be a new row for the hours assigned to the new account number. The new account number is the next to last number in each sequence of numbers in the Account column.



IMPORTANT: Although TIM Managers and TIM Administrators used to be able to right click the Totals Tab to move hours worked to different accounts, the process just described above must be completed in the Transfer column for each shift worked that needs to be transferred.

Delegate Authority (TIM Managers Only)

If a manager is not going to be available to perform their regular timekeeping and scheduling tasks for a limited period of time, he or she can delegate timecard management authority to another manager in TIM for the duration of his or her absence.

- This feature is for TIM Managers only, not TIM Administrators.
- Manager authority may be delegated only to another manager in TIM.
- Delegations cannot be made for more than 90 days. If the manager will be out for an extended period of time or authority needs to be delegated to someone who is not a current manager in TIM, the TIM Approver field on the employees' records in ConnectCarolina must be updated with the other manager instead.

This chapter covers the delegation process for both the delegating manager and the delegate request recipient.

Steps for the Delegating Manager

- Submit Delegate Authority Request
- View Delegate's Reply to Request
- If needed, Delete or Cancel a Delegate Authority Request

Steps for the Delegate Request Recipient

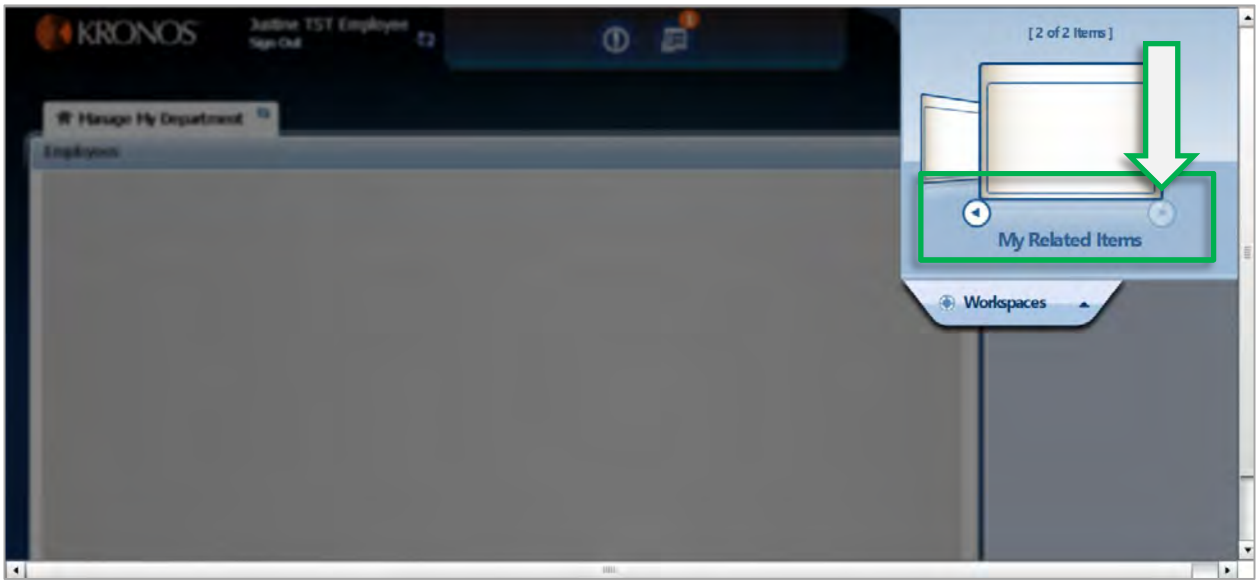
- Respond to a Delegate Authority Request
- Manage the Delegated Employees' Timecards
- View Your Upcoming Delegate Authority Schedule

❖ In addition to this chapter, a quick online overview of Historical Corrections is available at: finance.unc.edu > Training Icon > TIM tab > Delegate Authority – Managers Only (CBT).

Delegating Manager

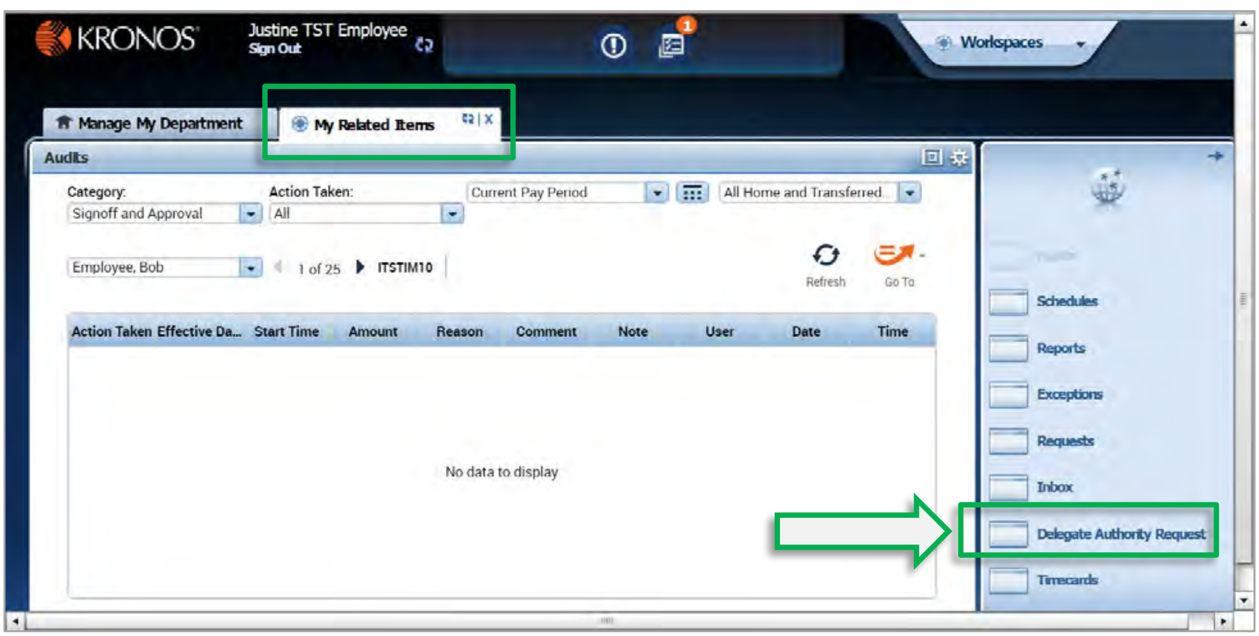
Submit Delegate Authority Request

4. Click the Workspaces tab.
5. Use the right pointing arrow to move from My Information to My Related Items.
6. Click on My Related Items.



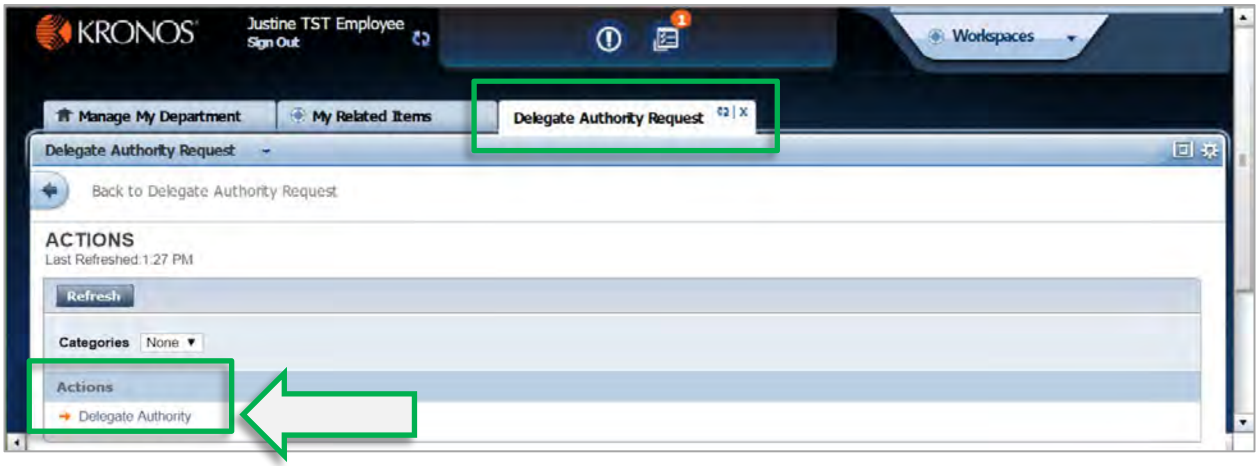
The My Related Items tab will appear.

7. Click on Delegate Authority Request.



The Delegate Authority Request tab will appear.

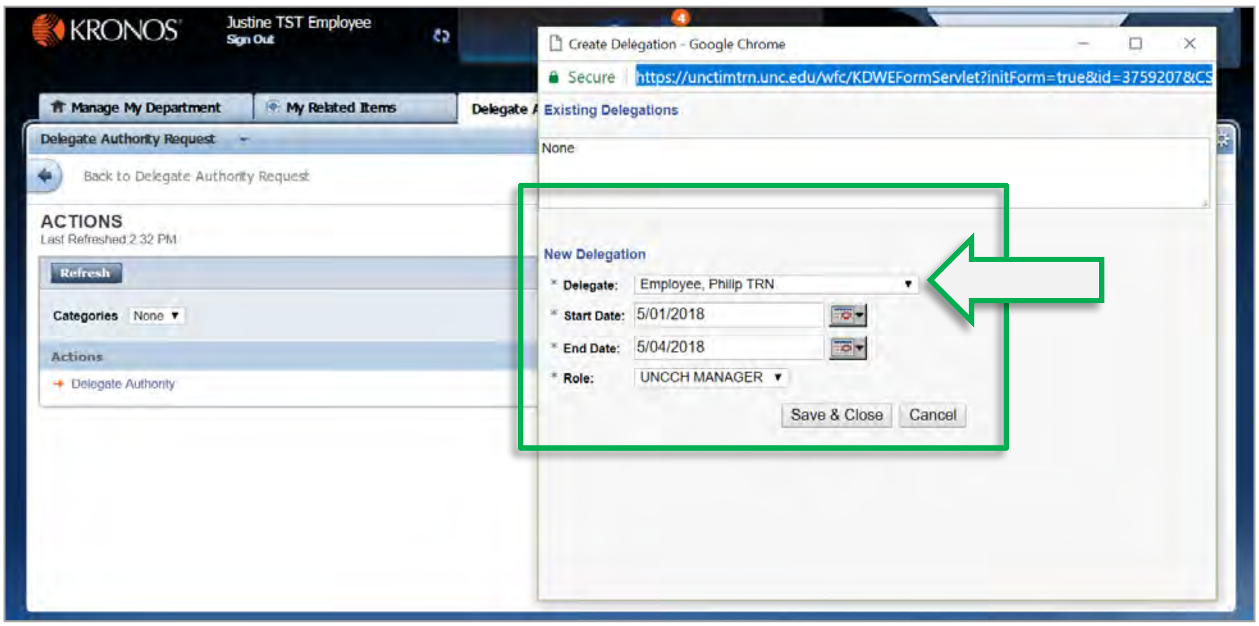
8. In the Actions section of the Delegate Authority Request tab, click on Delegate Authority.



The Create Delegation pop-up window will open (it may take a few minutes).

- The Create Delegation pop-up includes both TIM Managers and TIM Administrators. Managers should only delegate to other managers. When delegating be sure the person you select is a manager, not an administrator.
- If the manager you want to select is not in the list:
  1. Verify that the individual manages non-exempt employees in TIM. If they do not manage any employees or only manage exempt employees, they will not appear in the Delegate list and **cannot** be given delegate access.
  2. If they do manage non-exempt employees but are not in the list, call 962-HELP (4357) to report the missing data.

9. On the Create Delegation pop-up window open the Delegate box by clicking the down arrow.
10. Find the manager by scrolling. It's a long list, so it can be helpful to type the first letter of the name to move you through the list more quickly.
11. Click the manager's name.
12. Choose the Start and End Dates by clicking on the calendars. Delegations must not be made for longer than 90 days.
13. Leave the Role set to UNCCH Manager.
14. Click Save & Close.



The following happens when you save a Delegation:

You will receive:

- A Request Manager Alert in TIM
- A Manager Cancel Form in your TIM inbox

The request recipient will receive:

- A Request Manager Alert in TIM
- An Accept Delegation Form in his or her TIM inbox.
- A delegation request notification via Email.

View Delegate's Reply to Request

Once the delegate request recipient approves or declines the request, a message is sent to the delegating manager's TIM and Email Inboxes.

15. To view the responses within TIM, open your TIM Inbox.
    - Use the Workspaces tab to open My Related Items.
    - Select Inbox from the list on right.
16. Click the Messages tab to see the response(s).

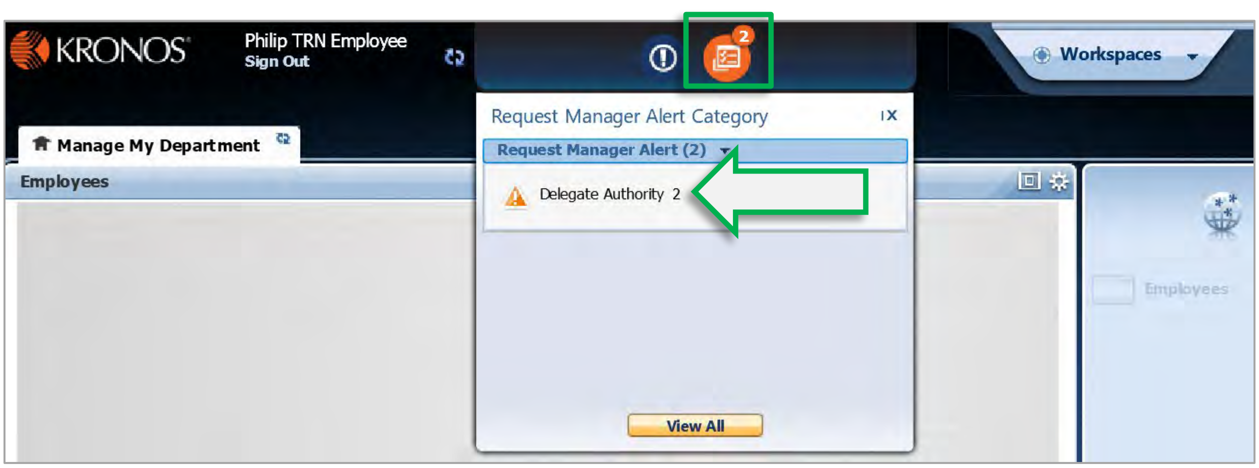
17. If the request recipient declines your Delegate Authority Request, you may submit a new request to a different manager. Note that the declined request will automatically be removed from your Task List.
18. Someone who is not currently a manager who is filling in for you during your absence cannot be delegated to in TIM. They may be assigned to manage your employees by updating the TIM Approver field in their records in ConnectCarolina.

Delete a Request or Remove an Active Delegation

If your plans change you can delete a request or remove an active delegation.

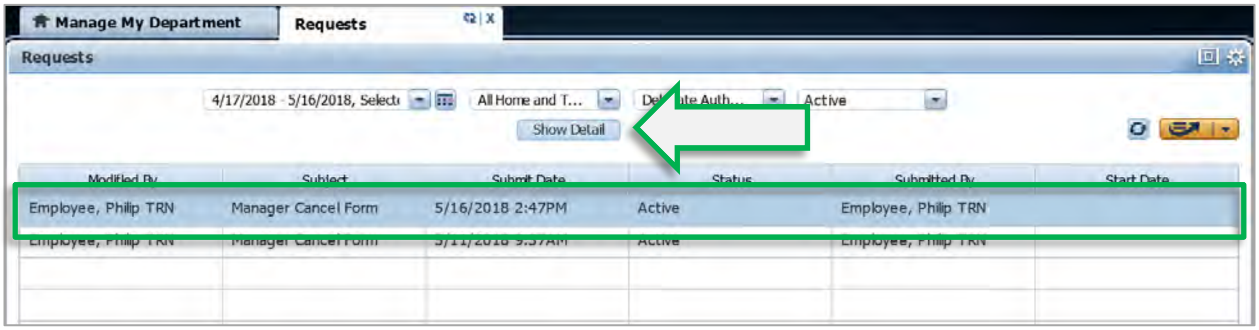
*To delete a Request **before** it has been accepted:*

19. Click on the Request Manager Alert icon.
20. Click on the Delegate Authority button.



The Requests tab will open.

21. Double-click the request to open the New Delegation details window, *or* select the Manager Cancel Form for the delegation you want to delete and click on the Show Detail button.

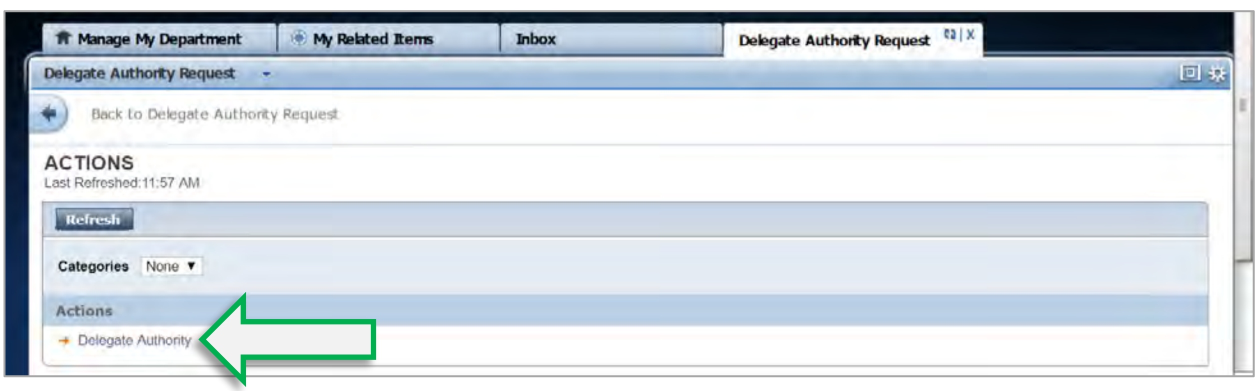


The Pending Delegation dialogue will open.

22. Click Delete. The request will automatically be removed.

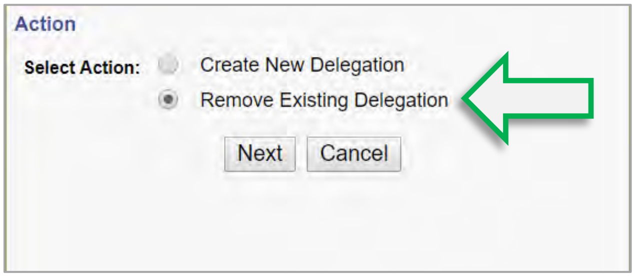
After *the Request has been accepted, the request manager alert will disappear, and you will no longer be able to delete the request. Instead, you will need to* ***remove*** *the existing Delegation.*

1. Open the Delegate Authority Request tab by going to your My Related Items workspace and clicking on Delegate Authority Request.
2. Click the Delegate Authority action.

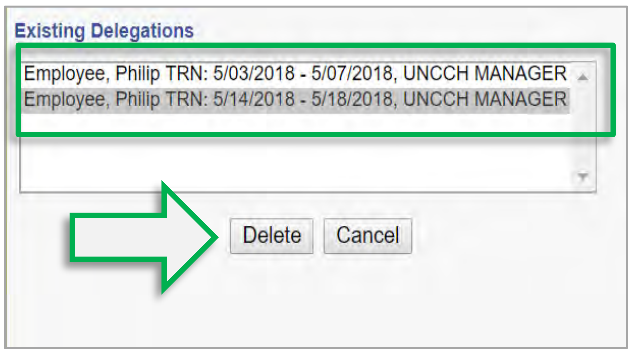


❖ When you created your first new Delegation Request, this action took you directly to the Create New Delegation dialogue. Since you now have an active, accepted delegation to manage, the Action dialogue asks you which kind of action to take.

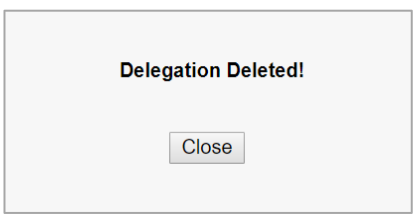
1. Select Remove Existing Delegation.
2. Click Next.



3. Select the appropriate Delegation from the list.
4. Click Delete.



5. Click Close in the confirmation dialogue.



Delegate Request Recipient

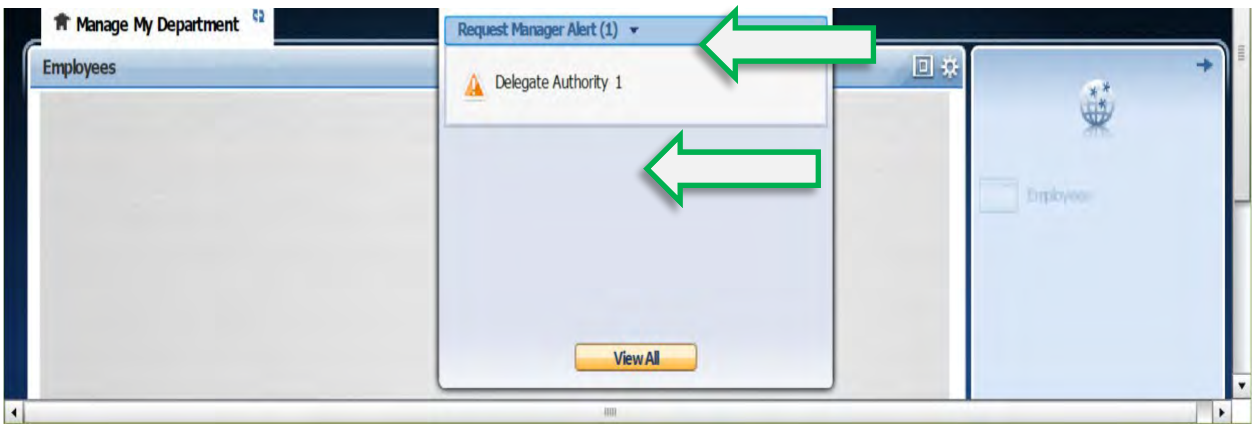
Respond to a Request for Delegate Authority

When a manager submits a delegate request to you, you will receive:

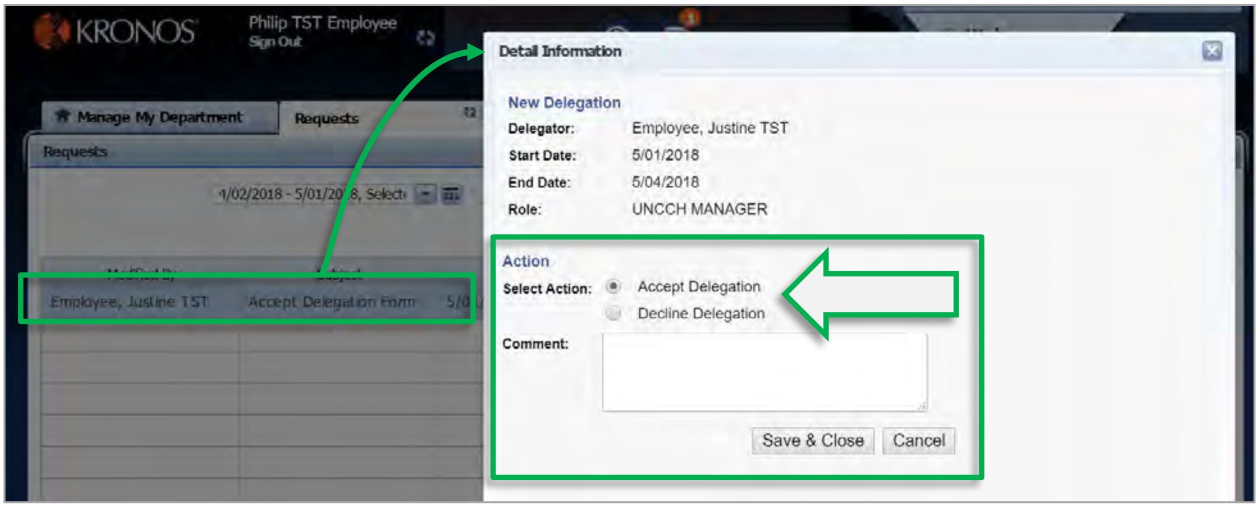
- A Request Manager Alert in TIM
- An Accept Delegation Form in your TIM inbox.
- A delegation request notification via Email.

You can access the request either via the alert or by opening your TIM Inbox. We will cover the alert option in this manual.

23. When a Request Alert appears in your workspace click the alert icon to open the Request Manager Alert list.
24. Click the Delegate Authority link (you can also select View All, but it will add a step).



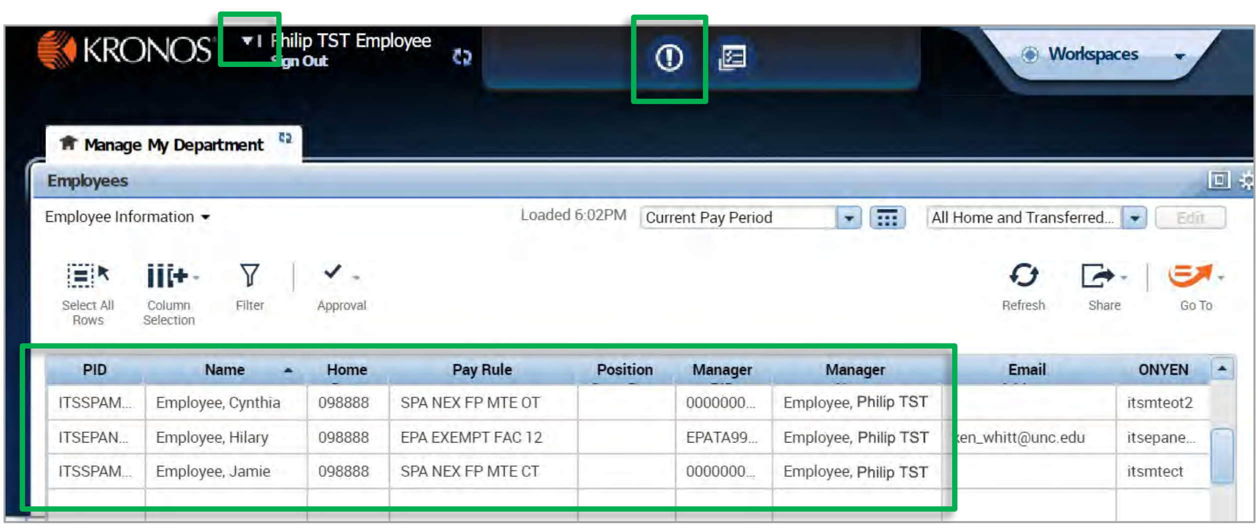
25. Double-click the request to open the New Delegation details window, *or* highlight the request and click on Show Detail.
26. After reviewing the information, either select Accept Delegation or Decline Delegation.
27. Click Save and Close.



Manage the Delegated Employees' Timecards

On the day that the delegation request begins, a triangle will appear in your navigation bar.

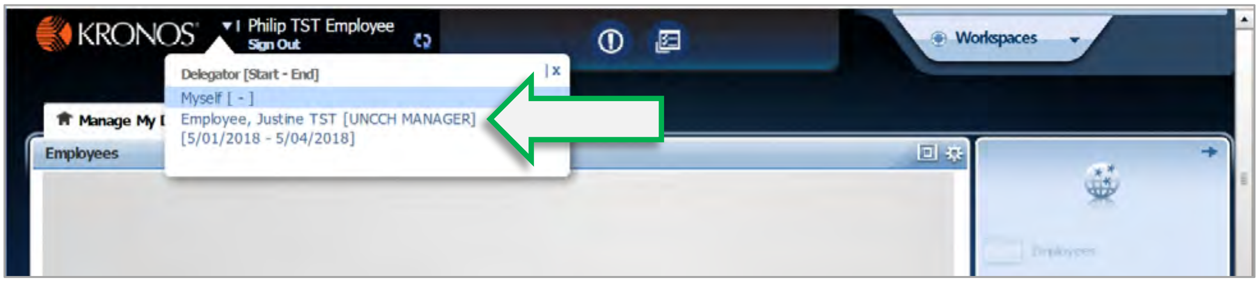
- If the triangle is not visible, either the delegation period has not started, or you need to complete your acceptance of the delegation request by logging out and back in to TIM.



28. Perform the required steps to manage your own employees.
29. When done, click the triangle to open the Switch Roles dialogue.

The Switch Roles dialogue allows you to select whether to view your own employees or the employees delegated to you by another manager. When you first log into TIM, you will always see your list of employees and your employees' exceptions.

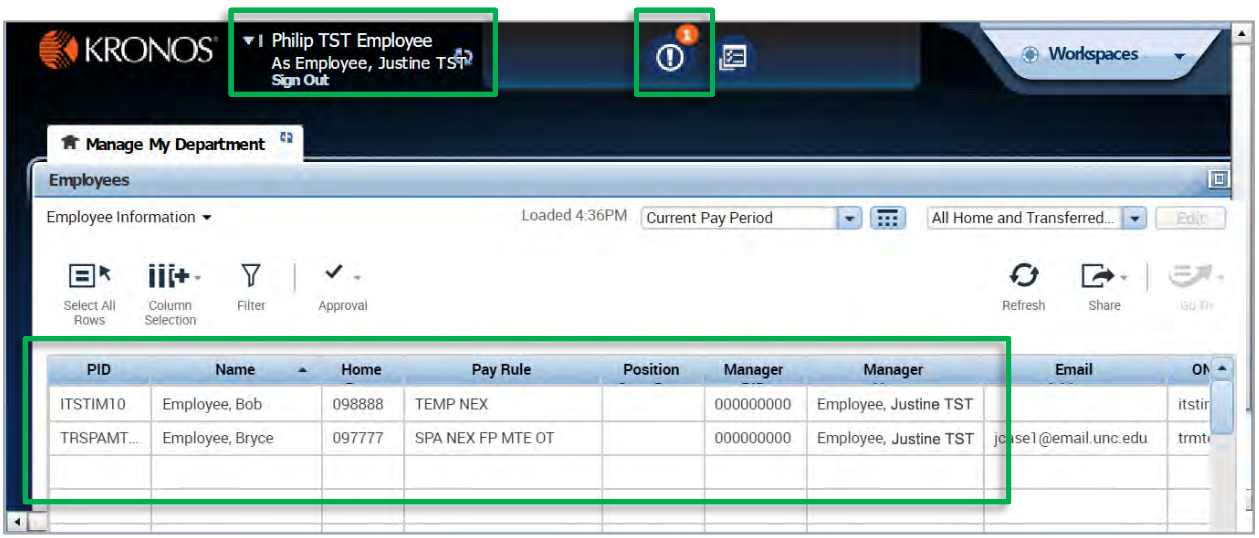
30. Click the name of the manager whose employees have been delegated to you.



Note the following changes in your workspace:

- The navigation bar now says that you are functioning as the other manager.
- The Employee Information list is showing the other manager's employees, not yours.
- In this example, the other manager has an Exception Alert.

31. Review, edit as needed, and approve the delegated employees just as you did your own.



The Switch Role triangle will disappear from the Navigation Bar when the requested delegate period ends or the other manager cancels the delegation.

Processing Pay Period Close

Pay Period Close Process

1. Employee Approves Timecard: Ensures correct hours worked and leave taken hours have been recorded. After an employee has approved his/her timecard, it is no longer available for further edits by the employee. The TIM Manager or TIM Administrator will need to make edits for the approved time period.
2. TIM Manager Reviews, Edits, and Approves Timecards: TIM Manager approval at the end of the pay period lets the TIM Administrator know the timecards are ready for processing. A TIM Manager can edit data after approving a timecard.
3. TIM Administrator Signs Off Timecards: Locks the timecard for payroll processing. After the TIM Administrator signs off, the timecard can no longer be edited in the signed off pay period.

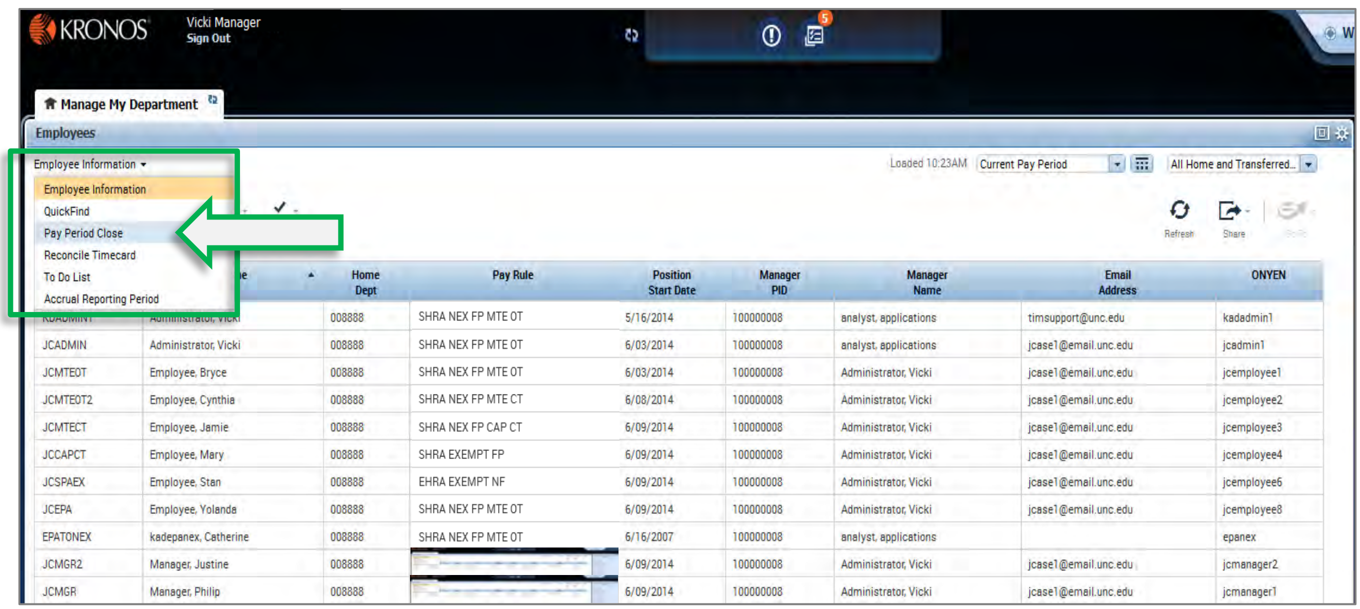
- ❖ All employee timecards must be signed off by the deadline even if the employee has worked 0 hours or employee or manager approvals have not been applied to the timecard.
- ❖ The employee's home department is responsible for performing sign off. If an employee works for multiple departments, the TIM Administrator should try to wait until as close as possible to 5:00pm on the scheduled sign off day. This will allow other departments time to review, edit, and approve the employee's hours worked.
- ❖ If employee or manager approvals have not been applied before the signoff deadline, a time detail report for that pay period should be printed, signed by the employee and/or manager, and placed in the employee's file.

Applying TIM Manager Approval

- SHRA Exempt and Non-Exempt employees must approve their timecards each biweekly pay period. EHRA Exempt employees must approve their timecards each monthly pay period. Deadline for employee approval is set by your department.
- After the TIM Manager has reviewed and edited employee timecards so they are ready for payroll and employee approval has been applied, he or she approves the timecard. Employees cannot edit or approve their timecards after TIM Manager approval has been applied.
- TIM Manager approval at the end of the pay period lets the TIM Administrator know the timecards are ready for processing.
- A TIM Manager can edit data even after approving a timecard.
- The TIM Manager approval deadline is set by your department.

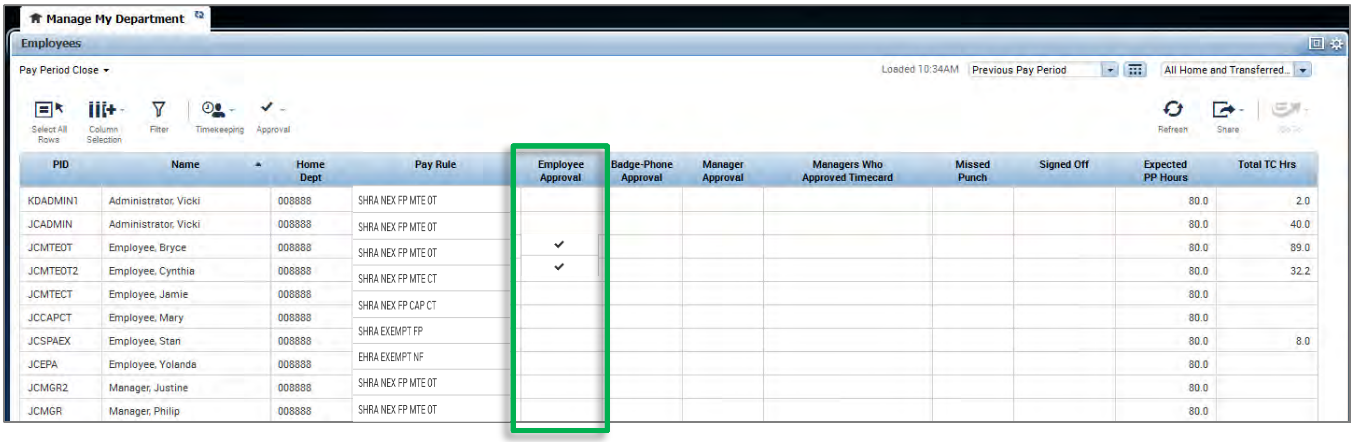
Steps for Approving Timecards: Managers

1. Log in to TIM and select Pay Period Close on the Genie Selector.

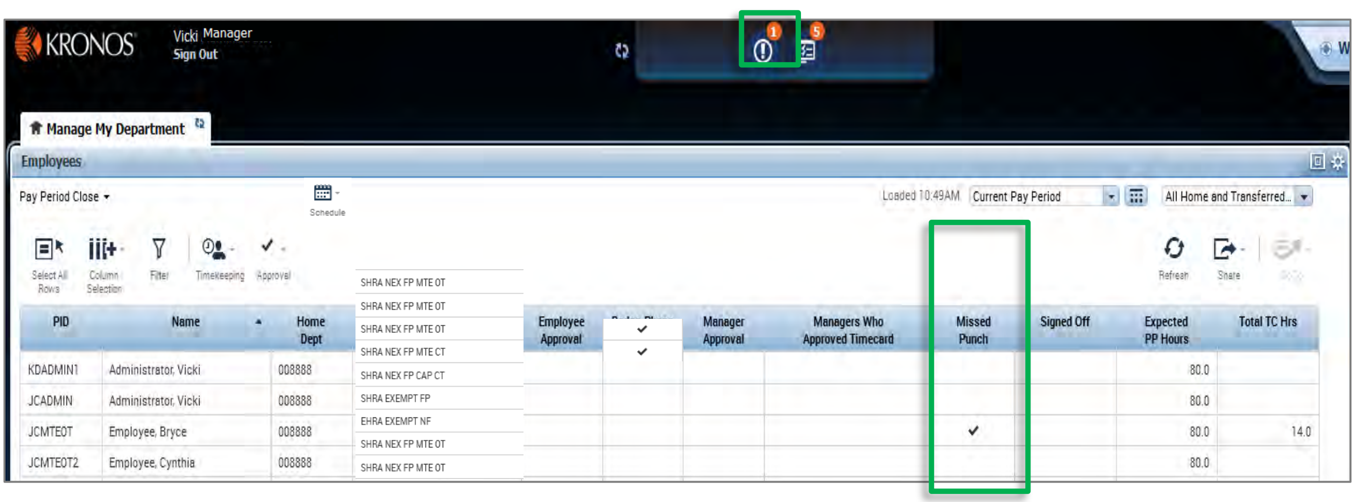


2. Check to see if there are any employees who have not approved their timecards. A check mark in the Employee Approval column means the employee has approved.

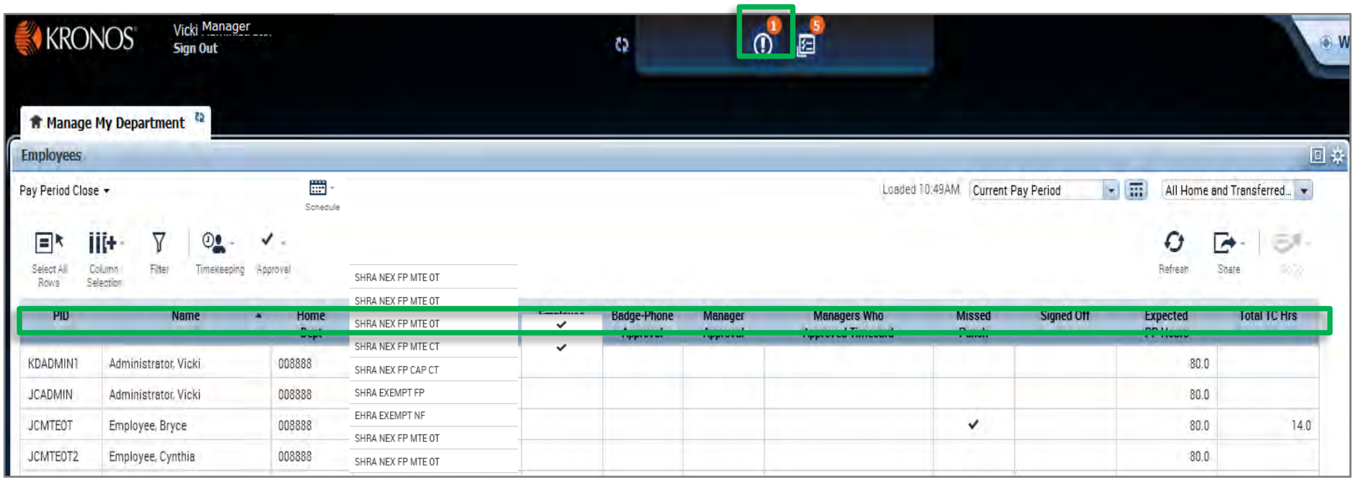
   A TIM Manager can approve an employee's timecard even if the employee has not. If you approve a timecard that the employee has not approved, print a time detail report for that pay period, have the employee sign it, and place it in his or her file.



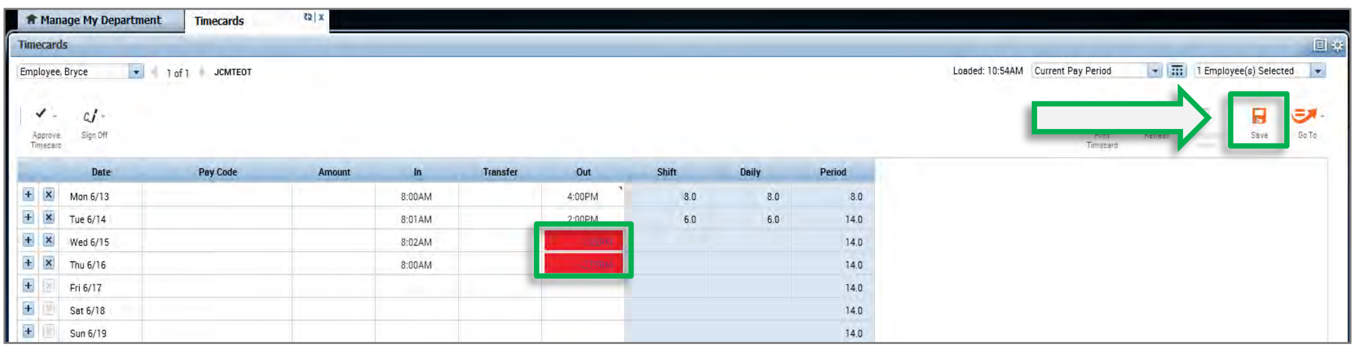
3. Check to see if there are any employees who have a missed punch. A check mark in the Missed Punch column indicates that an employee has a missed punch. This is also indicated if a number appears in an orange circle in the top right of the Exceptions Alert in TIM.



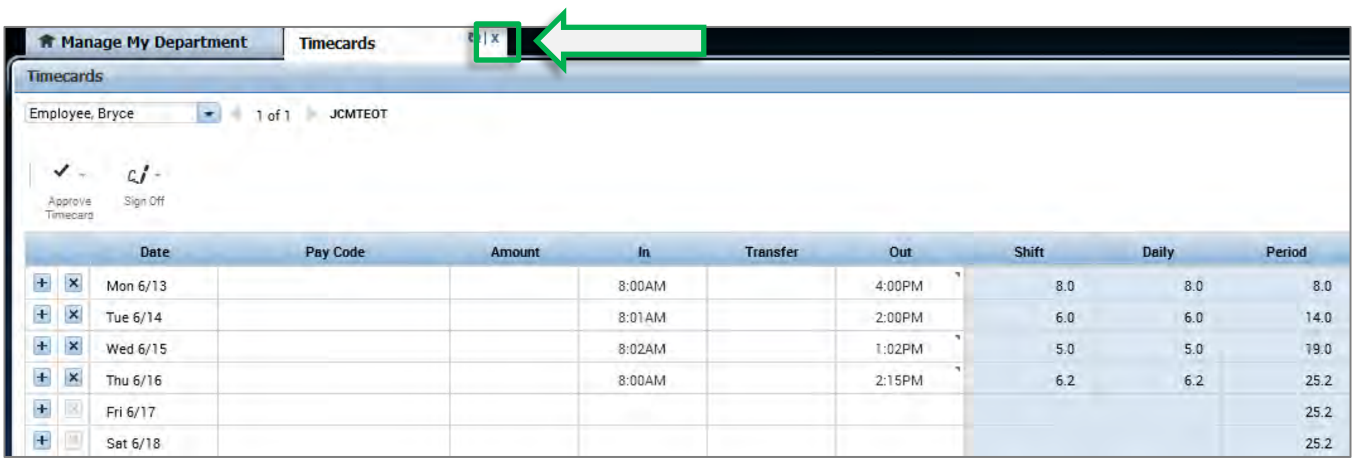
4. If there are missed punches, double click the row assigned to the employee with a missed punch to display his or her timecard.



5. If needed, contact the employee to find out the time out that is missing. Enter the time of the missed punch in each of the cells that appear red on the screen. Then click Save.



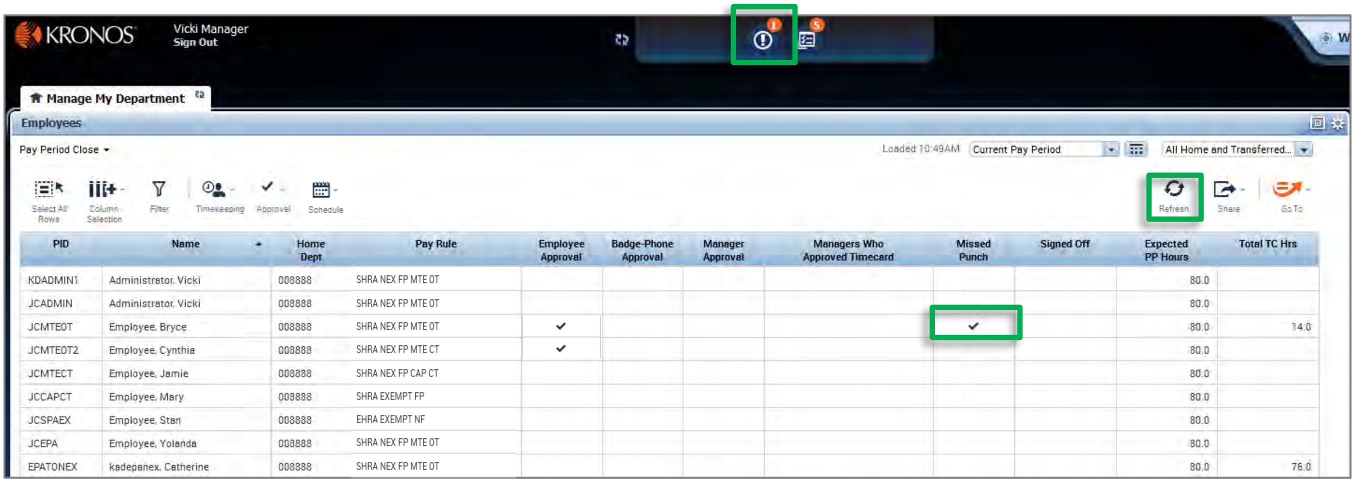
6. Click the X in the top right of the employee's timecards tab header to return to the Pay Period Close genie.



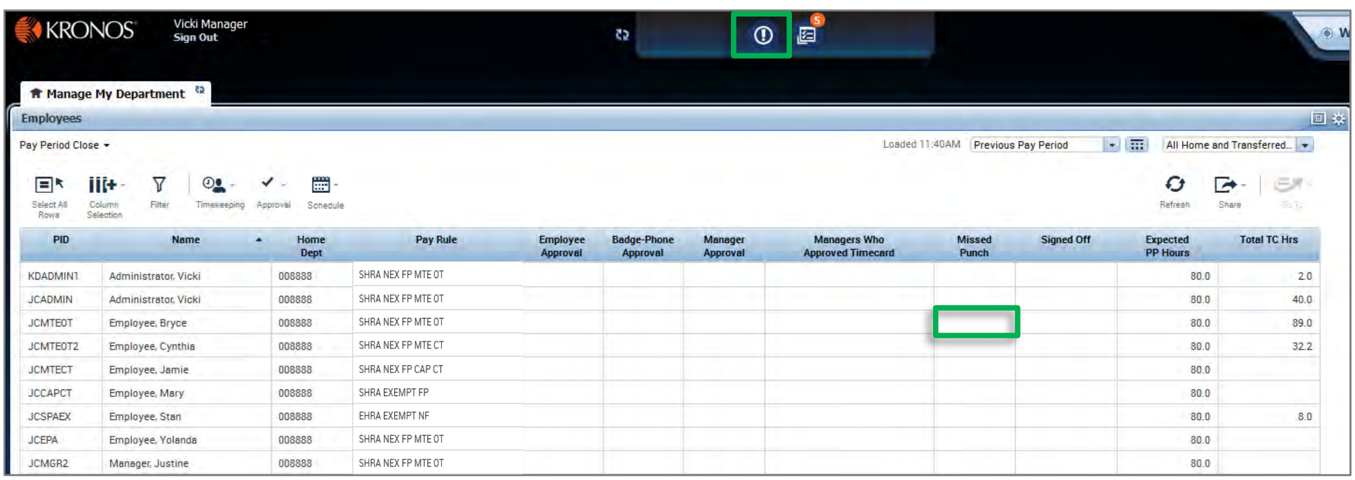
7. Click the refresh icon in the top right of the Manage My Department tab header.

The missed punch check mark and the orange circle in the top right corner of the Exceptions Alert should disappear if the employee timecard was edited successfully.

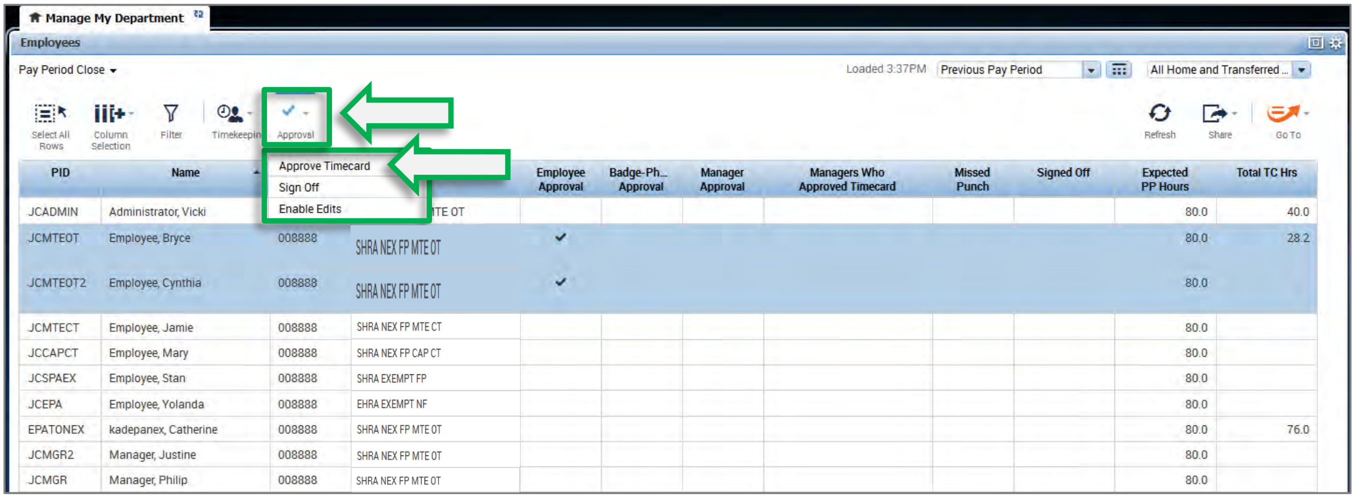
Before Clicking Refresh



After Clicking Refresh



8. After you have reviewed and updated the timecard if needed, approve those employee timecards by selecting them in the list and clicking Approval then Approve Timecard.



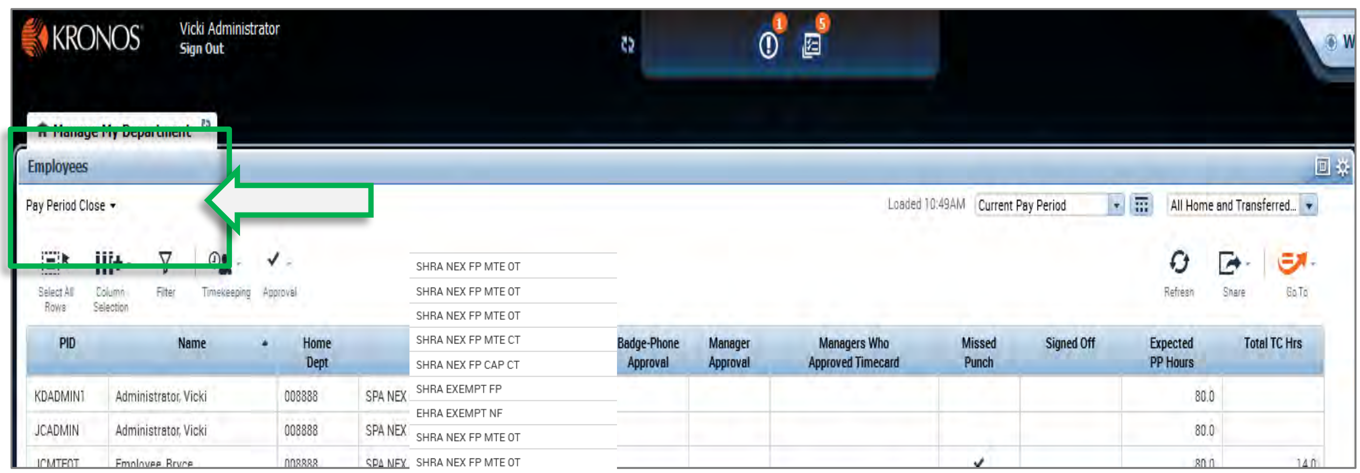
❖ Before your department's manager approval deadline, be sure to review and approve timecards.

Applying TIM Administrator Sign Off

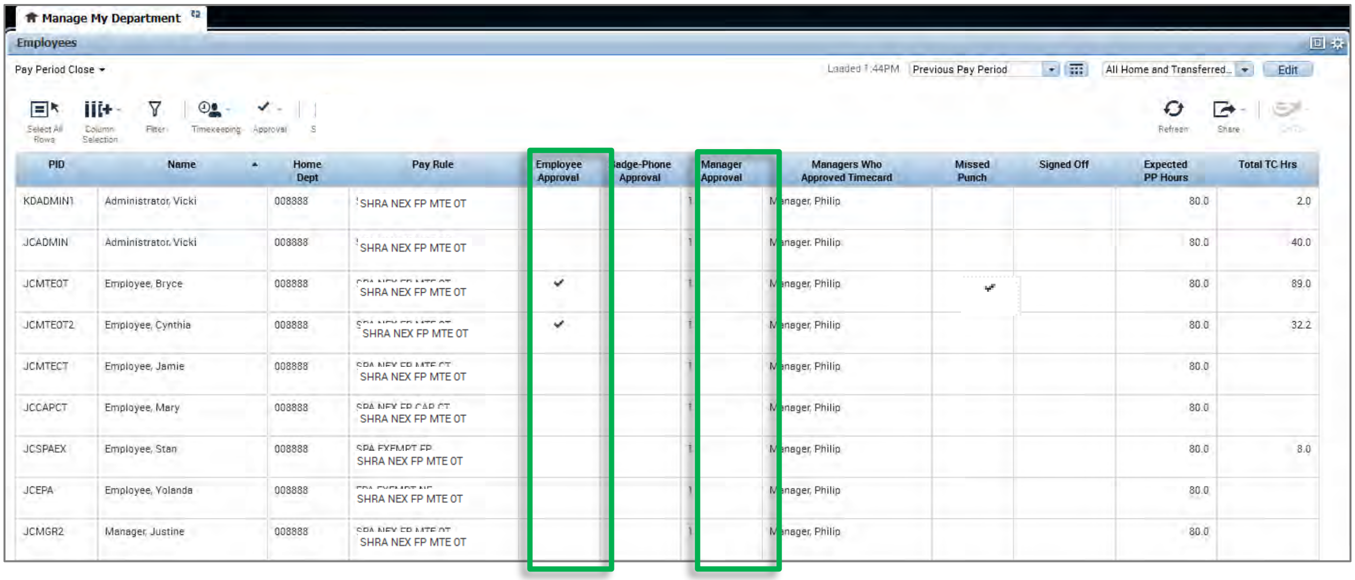
After the employee and the TIM Manager have approved the timecard, it is ready to be signed off by the TIM Administrator and processed for payment.

- ❖ TIM Administrators must sign off timecards for SHRA Exempt, Non-Exempt, and Student and Temporary employees by 5:00 pm on the Tuesday after the pay period has ended.
- ❖ TIM Administrators must sign off timecards for EHRA Exempt employees by 5:00 pm on the 15th of the month.
- ❖ TIM Administrators must sign off timecards for EHRA Non-Exempt employees by 5:00pm on the 10th of the month. (Employees must approve by the 4th and Managers must approve by the 7th each month. These deadlines will not be moved if they fall on a weekend. This should be done in advance if needed).

1. Log in to TIM and select Pay Period Close on the Genie Selector.

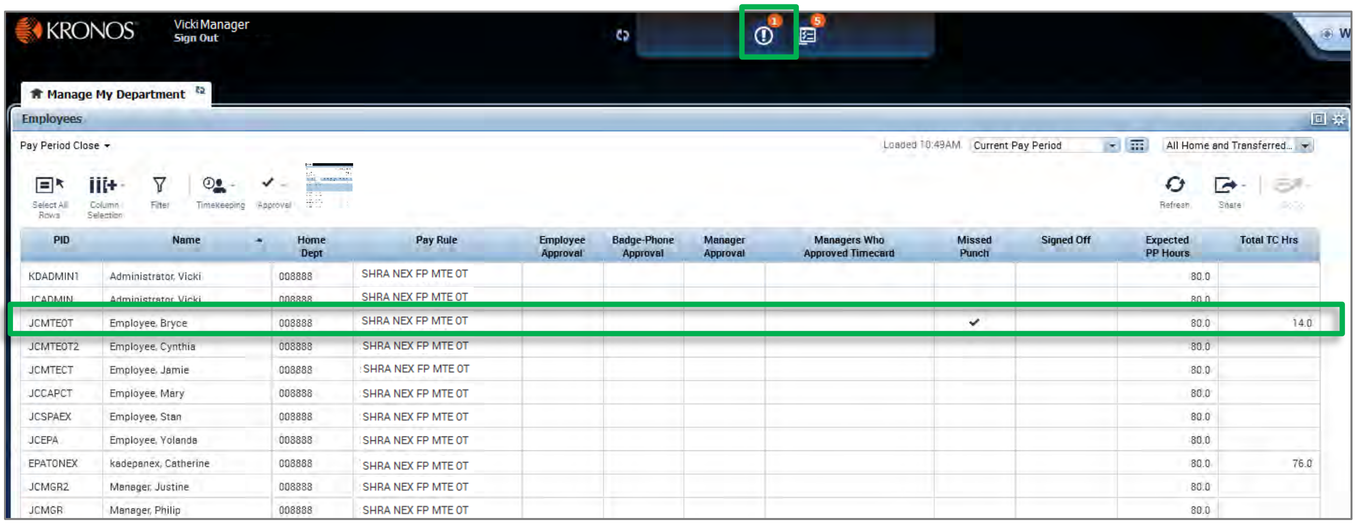


2. Check to see if there are any employees who have not approved their timecard. A check mark in the Employee Approval column means the employee has approved.
   - Also check to see if there are any managers who have not approved the employee's timecard. A number in the Manager Approval column indicates that TIM Managers have signed off on the employee's timecard.
   - If there any timecards that have not been approved, notify the TIM Manager.
   - After timecards have been approved by both employee and TIM Manager, the TIM Administrator can sign off. However, TIM Administrators must sign off by the deadline even if employee or manager approval has not been applied.

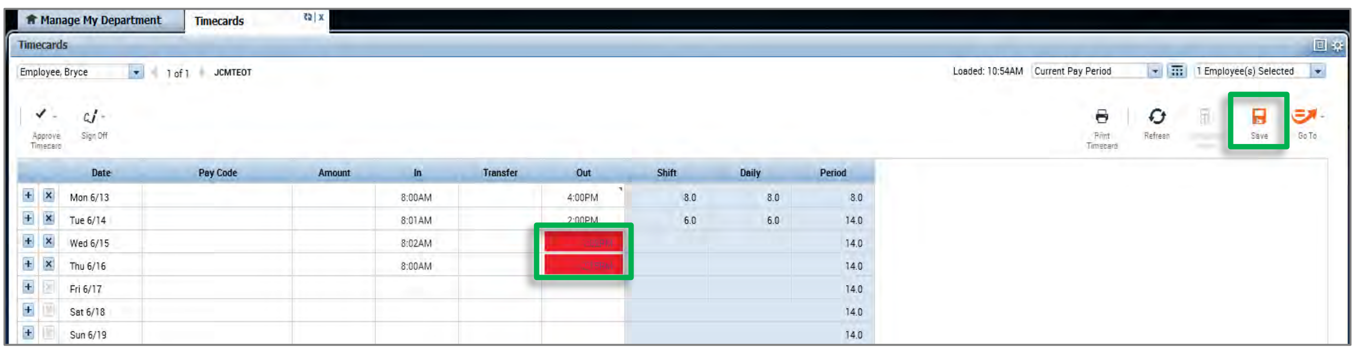


3. Check to see if there are any employees who have a missed punch. A check mark in the Missed Punch column indicates that an employee has a missed punch. This is also indicated if a number appears in an orange circle in the top right of the Exceptions Alert in TIM.

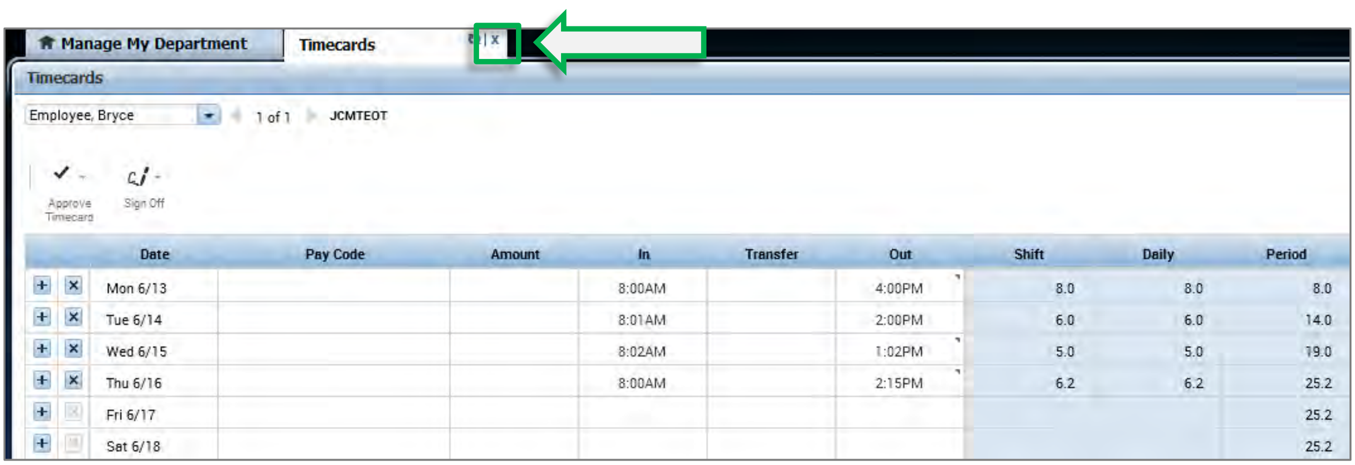
4. If there are missed punches, double click the row assigned to the employee with a missed punch to access his or her timecard.



5. If needed, contact the employee to find out the time out that is missing. Enter the time of the missed punch in each of the cells that appear red on the screen. Then click Save.

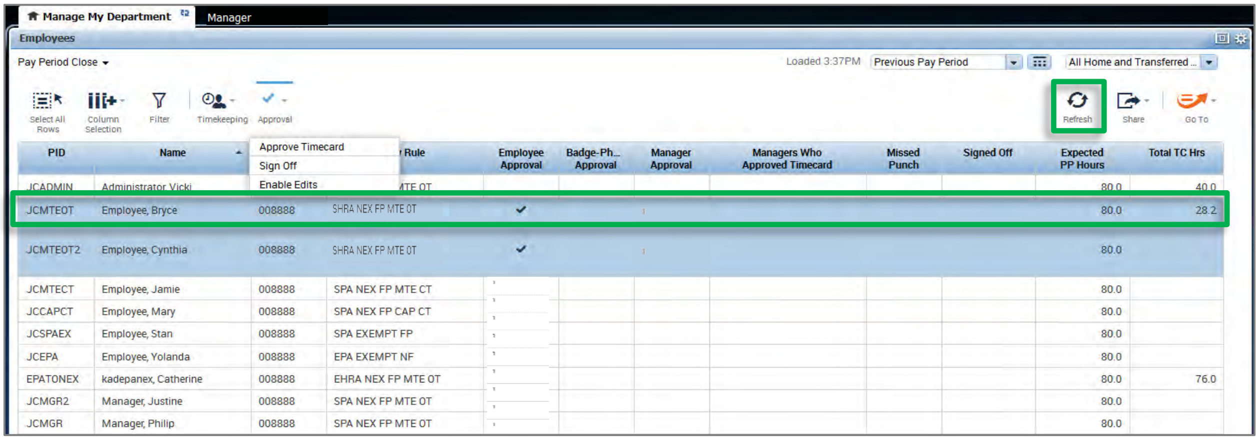


6. Click the X in the top right of the employee's Timecards tab header to return to the Pay Period Close genie.

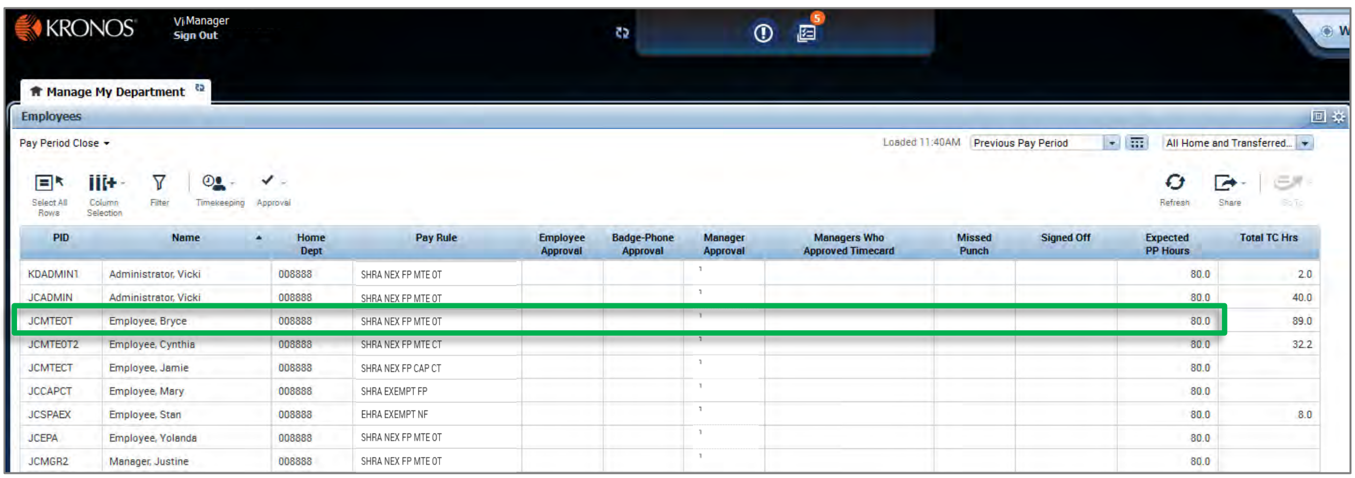


7. Click the refresh icon in the top right of the Manage My Department tab header. The missed punch check mark and the orange circle in the top right corner of the Exceptions Alert should disappear if the employee timecard was edited successfully.

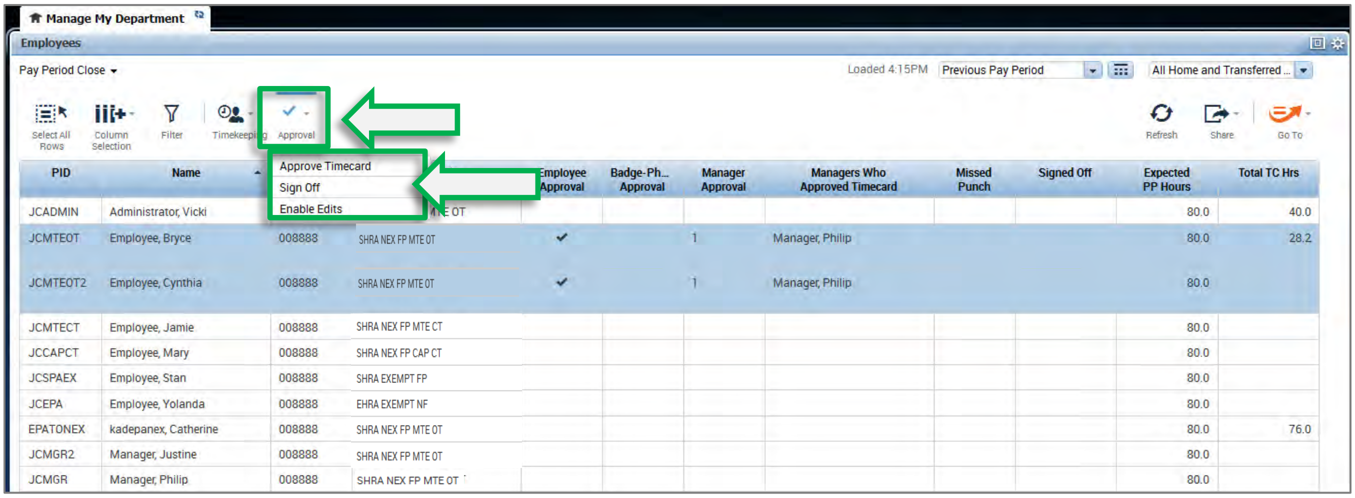
Before Clicking Refresh



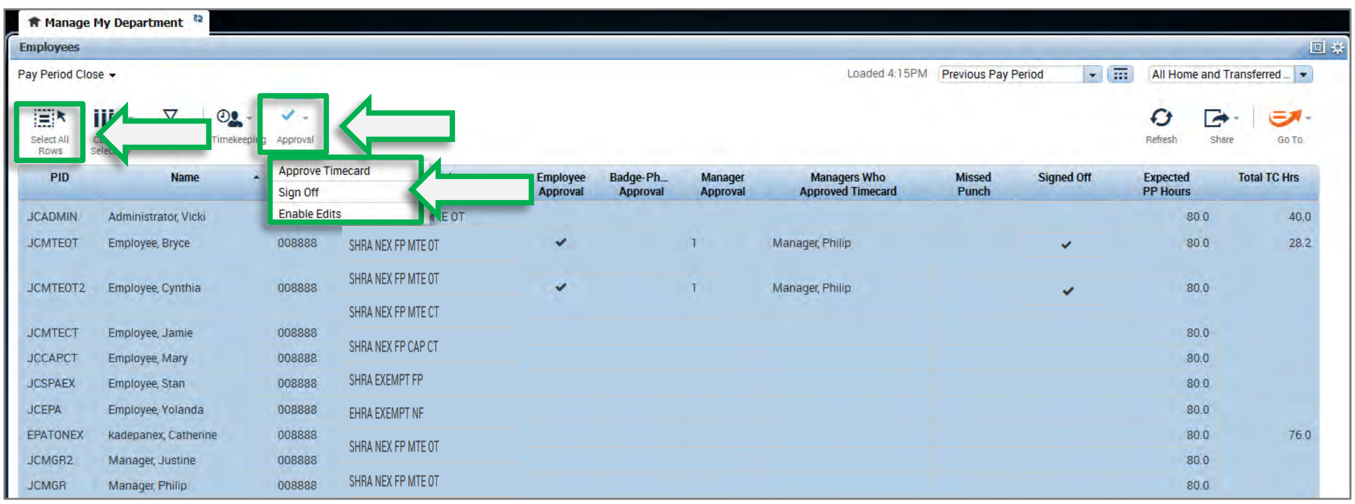
After Clicking Refresh



8. After all missed punches have been addressed and employee and manager approvals have been applied, sign off employee timecards by selecting them in the list and clicking Approval then Sign Off.



9. Before the TIM Administrator sign off deadline double-check to be sure you have signed off all timecards. Select all rows, including any that were not signed off by the employee or the manager, and click Approval and select Sign Off.



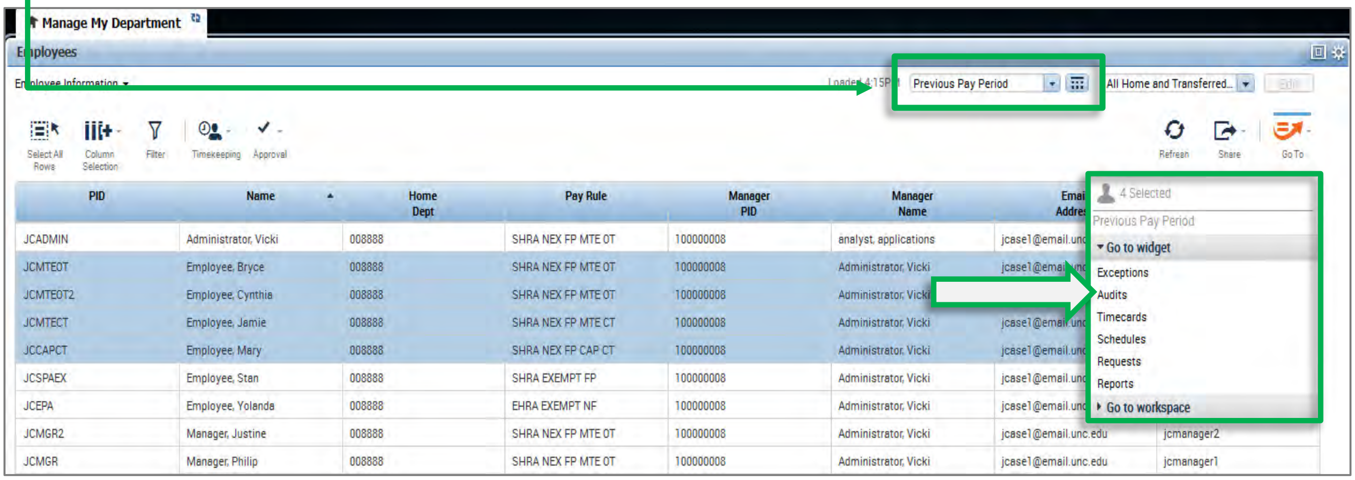
Using the Audits Widget at Pay Period Close

If you are signing off employee timecards and wish to view additional details related to an employee's timecard you can access the Audits Widget.

The Audits Widget opens the audits tab that will display all of the audits made for the selected employee(s) in the time period selected including historical corrections, comments, time off notification requests, signoffs, and approvals.

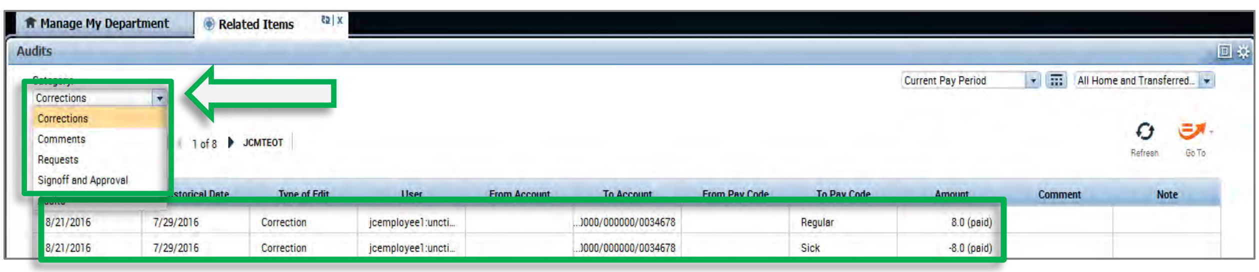
To access the Audits Widget:

1. Select the Pay Period or date range that you wish to view information for.
2. Click Select All Rows to display information for all of your employees or click to highlight only the employees that you wish to view information for.
3. Click the GoTo Icon and select Audits.



You can view the various types of audits that have been made in the time period selected by clicking the arrow on the right side of the Category field to display the dropdown menu and selecting the type of audits that you want to view.

For example, the Corrections category shows all of the Historical Corrections that were made in the time period selected.



Historical Corrections

If a timecard needs to be modified after the TIM Administrator has signed off, the revisions must be made as Historical Corrections by an **authorized** TIM Administrator.

- If you are a TIM Administrator and need to be authorized to make Historical Corrections in TIM, an HR Officer must email TIM Support (timsupport@unc.edu) to request that access for you.
- TIM Managers cannot make historical corrections.

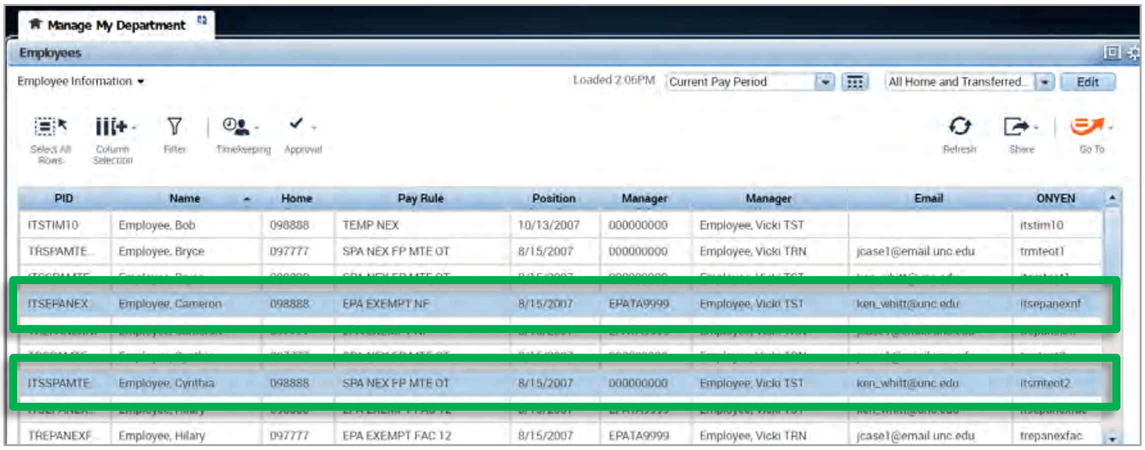
❖ In addition to this chapter, a quick online overview of Historical Corrections is available at: finance.unc.edu > Training Icon > TIM tab > Historical Corrections – TIM Administrators Only (CBT).

Enable Edits (TIM Administrators Only)

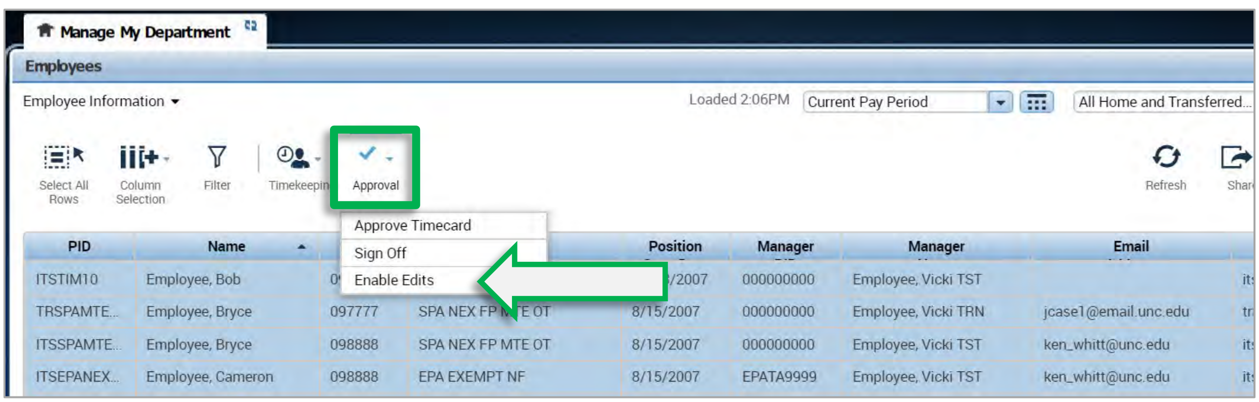
The ability to edit a timecard is turned off when the TIM Administrator signs off. To make any edits after you sign off and the pay period closes, you must enable edits before you can make your historical corrections. You can enable edits for either one employee or multiple employees.

1. Select the employee(s).
   - To enable edits for all employees, click the Select All Rows button.

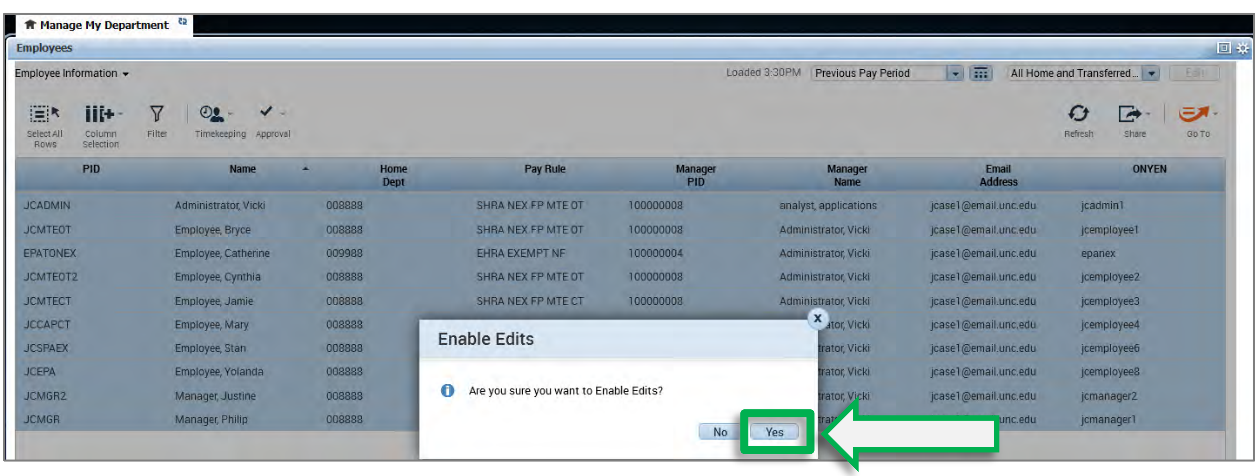
- To enable edits for one employee, select the employee. If you want to select more than one employee, hold down your Ctrl key while clicking on the additional employees.



2. Click Approval and select Enable Edits.



3. Click Yes.



> ❖ If you sign off prematurely and need to keep editing before a pay period closes, you can submit a Signoff Removal Request to timsupport@unc.edu. Signoff Removal requests must be received before 4:00 pm on the day of the 5:00 pm pay period close deadline. You will likely need to enable edits before proceeding. Any additional edits made before pay period closes will be included in the active pay period.

Enter Historical Corrections (TIM Administrators Only)

1. With edits enabled, open the affected timecard.
2. Go to the date that needs to be corrected in a signed off pay period by displaying the Previous Pay Period or select the appropriate range of dates.

3. Revise the timecard as needed so that it reflects the employee's actual activity.
4. Click Save.

A message will appear warning you that the timecard has been corrected.

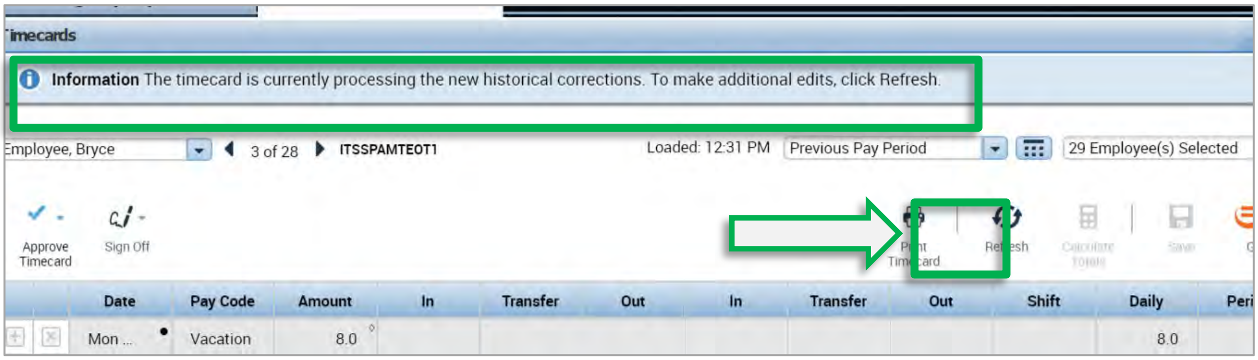
5. Click OK.

The save button will still be orange indicating that the correction has not yet been saved.

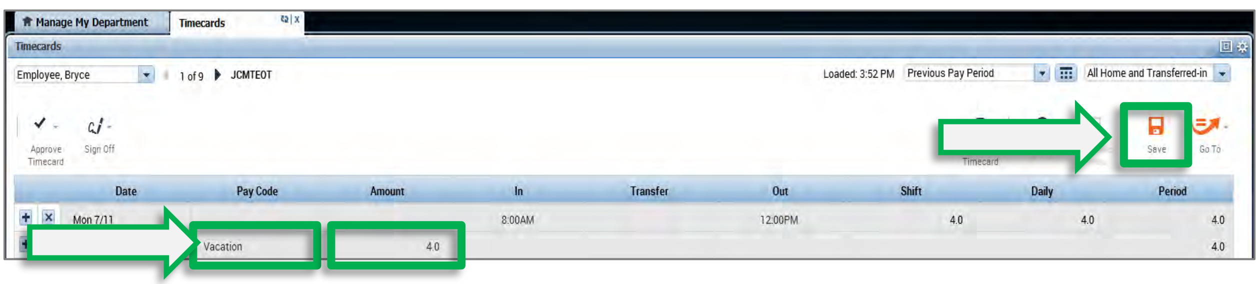
6. Click Save again.

After saving, the timecard will be locked while TIM processes the information. If you need to make additional corrections you will need to refresh the screen.

7. Click Refresh, then make your additional corrections.



❖ As of the July 2018 TIM release, TIM Administrators are no longer prompted to select whether to 'Include in Totals' when saving corrections. All historical correction hours are now automatically included in the Totals tab for the upcoming payroll. When making a leave balance adjustment historically, such as updating a vacation balance for a new hire with previous state service, these hours must not be included in the totals. See page 103 to learn how to use the new HC Accrual Adj tab to adjust historical corrections that affect leave hours so that they do **not** impact upcoming pay totals.

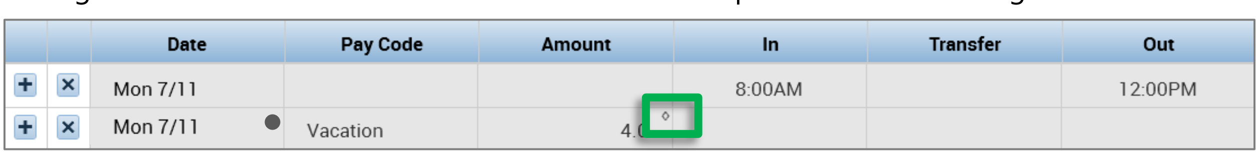


A small diamond will appear in the top right corner of the cell and a dot will appear next to the affected date, indicating that a Historical Correction has been made.

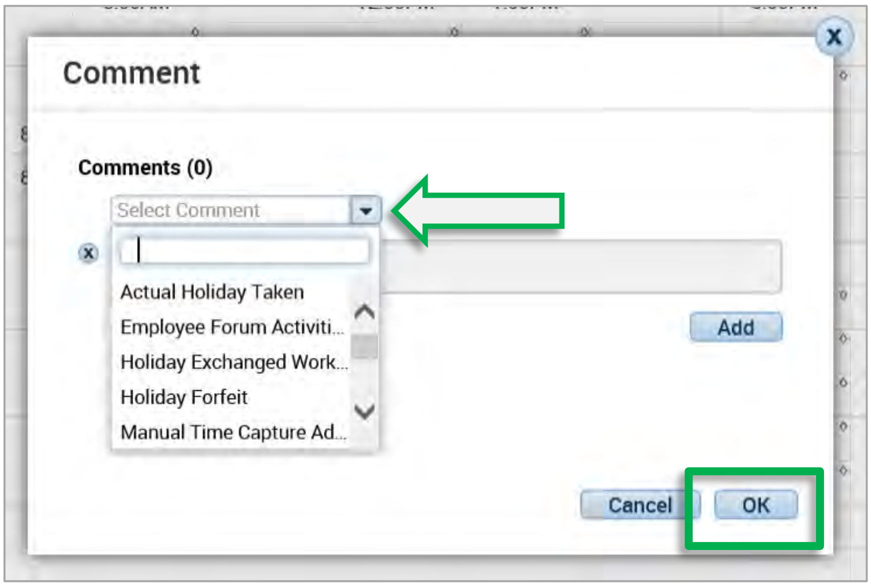
Add a Comment to Your Historical Correction

When making Historical Corrections you should always add a comment to explain why the correction is needed.

8. Right click on the cell that contains the diamond to open the Actions dialogue.



9. Click Comments.
10. Select the most appropriate option from the dropdown list. Manual Time Capture Adjustment or Manual Accrual Adjustment are frequently used.
11. Enter a detailed note explaining why the Historical Correction is needed.
12. Click OK.



In addition to the diamond in the upper right corner, the cell now has a blue text bubble. You can hover over this bubble to read the Comments and Notes.

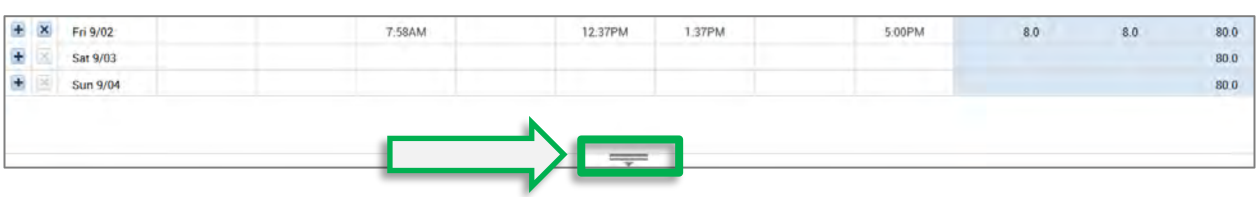
The Historical Correction edit to the timecard is now complete. It is a good idea to review your work to make sure the accruals and pay totals have updated as you intended.

View Historical Corrections on the Totals Tab (Managers and TIM Administrators)

When Historical Corrections are made to a previous pay period, the hours added or subtracted will usually impact the upcoming payroll. After making Historical Corrections you should review the Totals tab for the current pay period to review your corrections.

To view the impact of Historical Corrections on the current pay period:

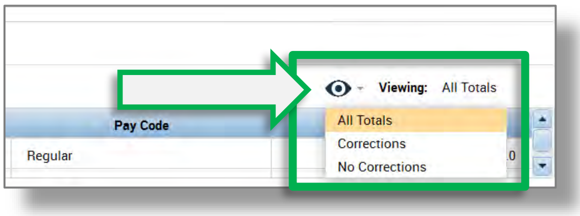
1. With the timecard open, select the **current pay period**.
2. Click the Show Timecard Tabs icon.



3. Click the Totals tab.

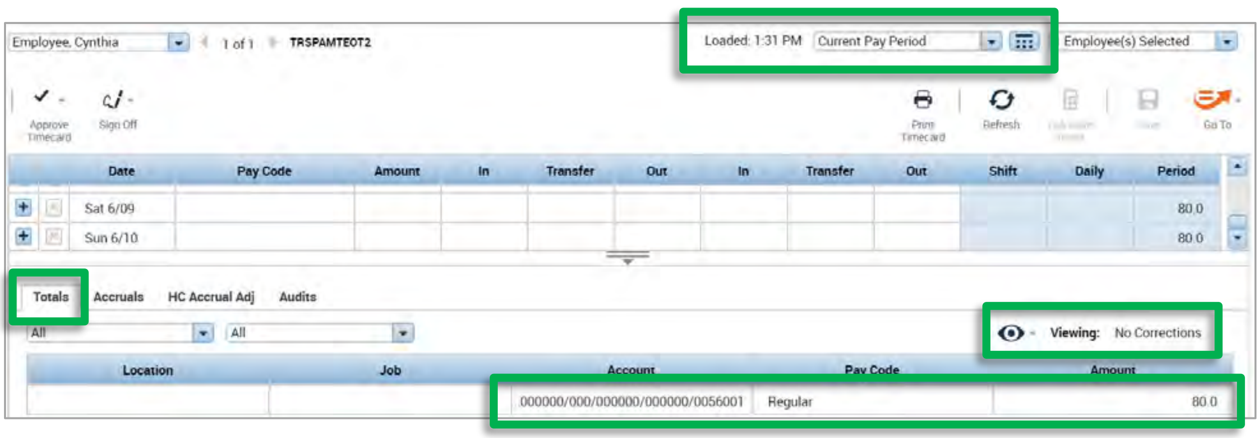
An Eye icon will appear on the Totals tab if one or more Historical Correction from a previous pay period has been included in the totals for the pay period selected.

By default, the Totals tab shows all hours to be sent to payroll in the time period selected. You can also select to view just the Corrections or No Corrections.



So, for this time period:

The **No Corrections** view on the Totals tab shows only the hours directly entered into the timecard for the pay period selected.

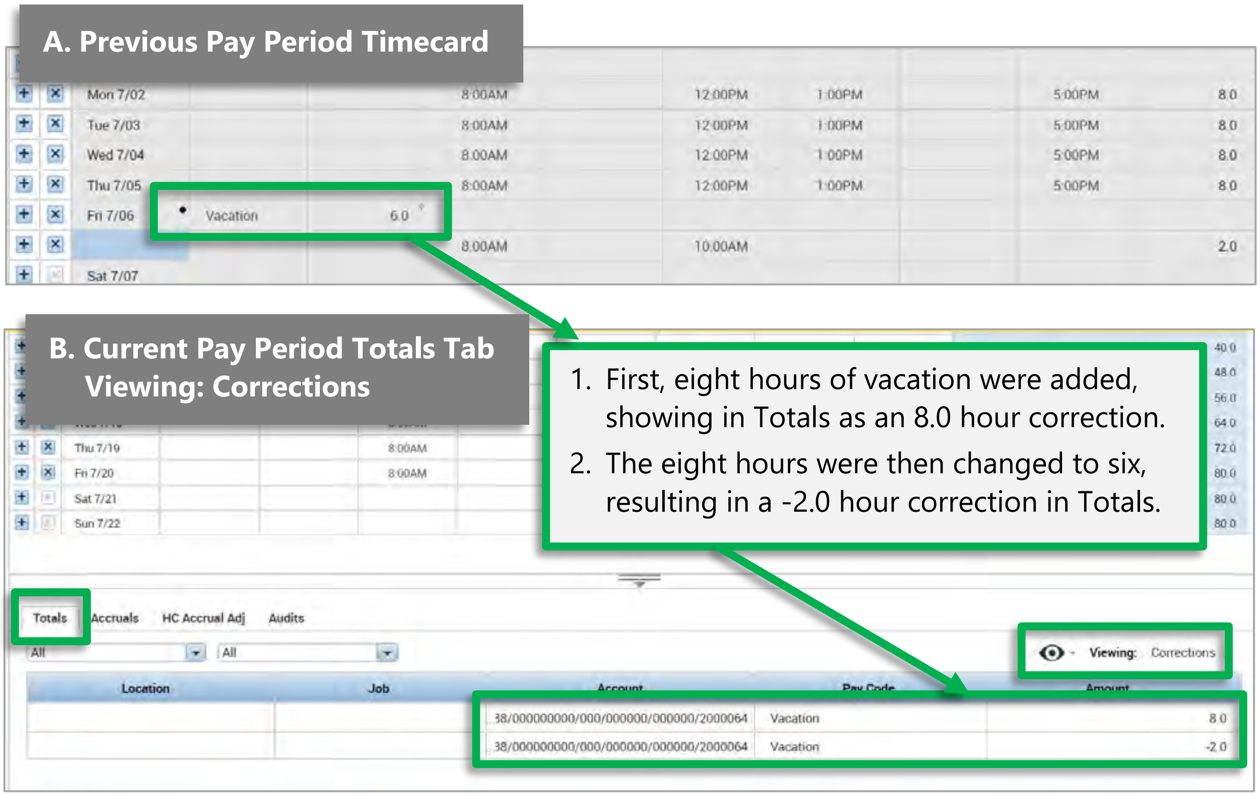


The **Corrections** view lists each correction that was made in a **previous time period** that is set to Include in Totals for the **selected time period**.

The diagram below shows:

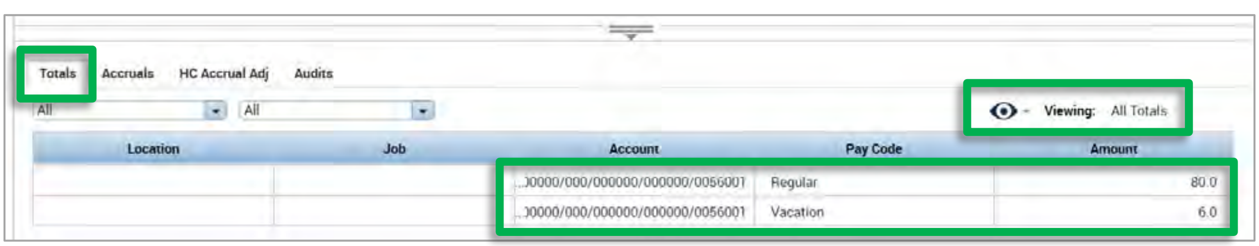
A. The **previous pay period timecard** showing the historical correction. In this situation the employee worked and recorded two hours on Friday 7/6, but she forgot to add her vacation time. The TIM administrator added the vacation time, but made a mistake: at first he entered 8 hours, then realized that the employee had only used six hours, so he changed the entry to 6.

B. **The current pay period timecard** with the Totals tab set to view Corrections. Here you see the original entry of 8 vacation hours, followed by -2 hours of vacation showing that the TIM Administrator changed the amount from 8 to 6.



Note that these hours were worked or earned in a previous pay period, so will not impact Overtime or Comp Time for the current pay period.

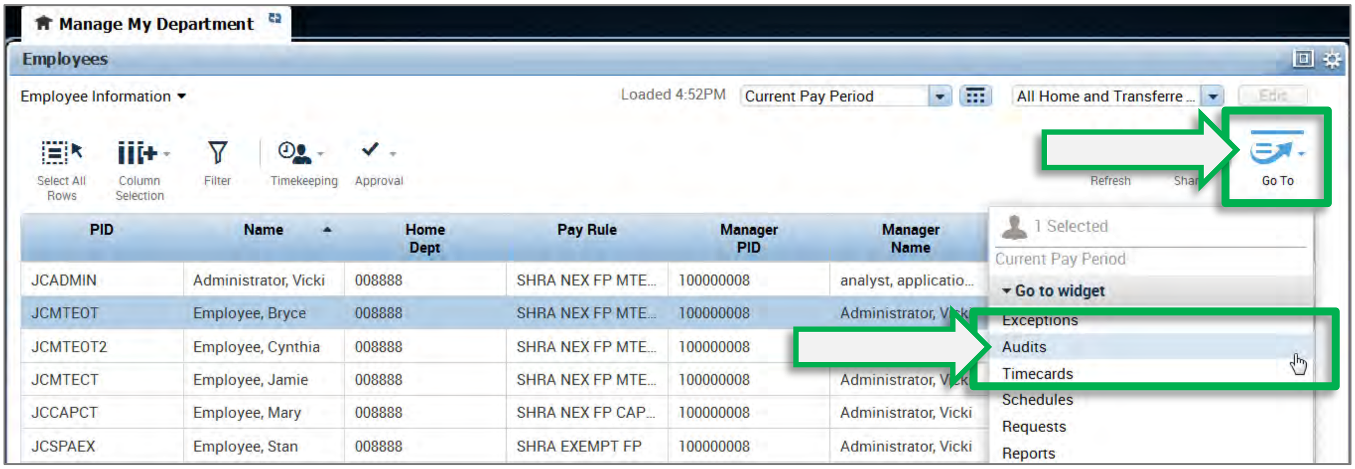
The **All Totals** view shows both the Historical Corrections and the current hours. The employee will be paid for a total of 86 hours (80 regular + 6 vacation) in the upcoming pay period.



Run an Audit to View Historical Correction Details

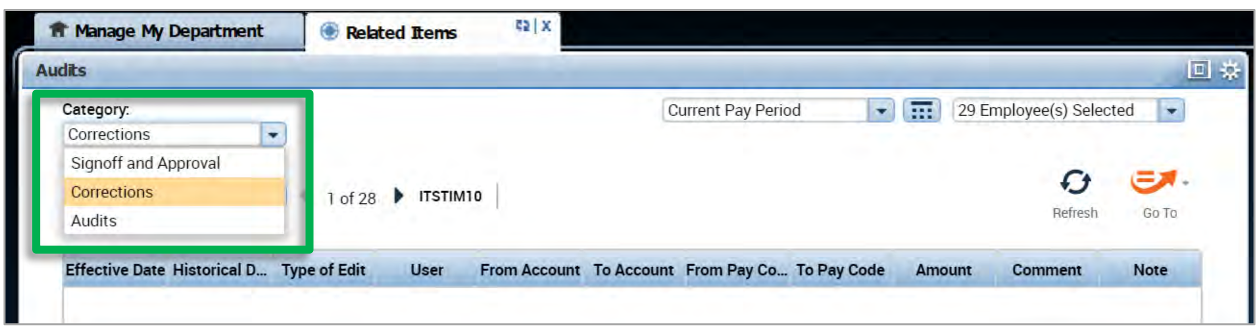
The Audits Widget allows you to view additional detailed information about Historical Corrections.

1. In the Manage My Department tab, select the appropriate employee or employees.
2. Click the Go To icon and select Audits.



The Audits Widget defaults to the Signoff and Approval category.

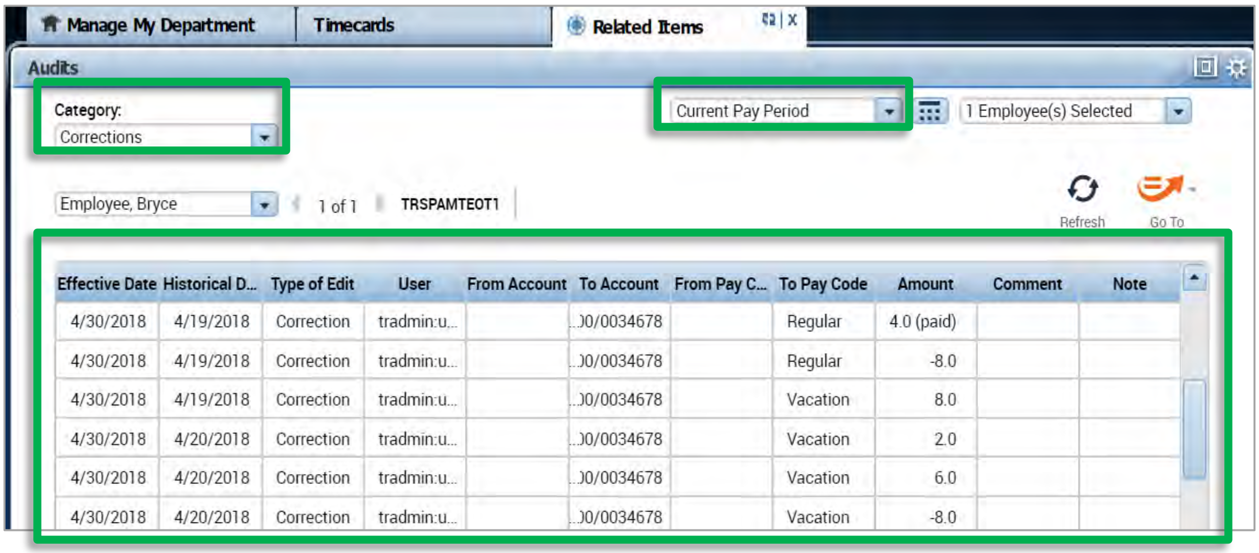
3. From the Category drop-down select Corrections. The Corrections category shows all of the Historical Corrections that were entered into TIM within the time period selected.



4. The default time period is Current Pay Period. Select a different time period if necessary.

On this page you can view important tracking information, such as the the Onyen of the authorized TIM Administrator who entered the correction, the pay code, and the amount of hours. As with the Corrections view discussed in the previous section, the Corrections Audit lists every modification that was made. So if a particular entry was modified and saved several times, each modification will show in the list. The end result of these modifications can be viewed in the Totals tab.

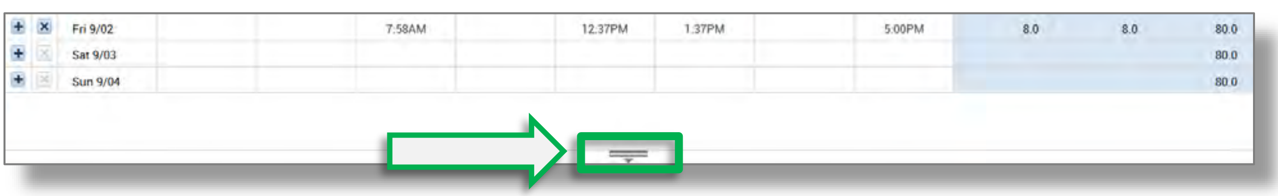
- The Effective Date is the last day of the pay period that will be impacted by the correction.
- The Historical Date is the date that was corrected.
- If the hours in the Amount column include a (paid) comment, then those hours are **not** included in the pay totals for the indicated Effective Date. The hours that do not include a (paid) comment are included in the pay totals for the indicated Effective Date.



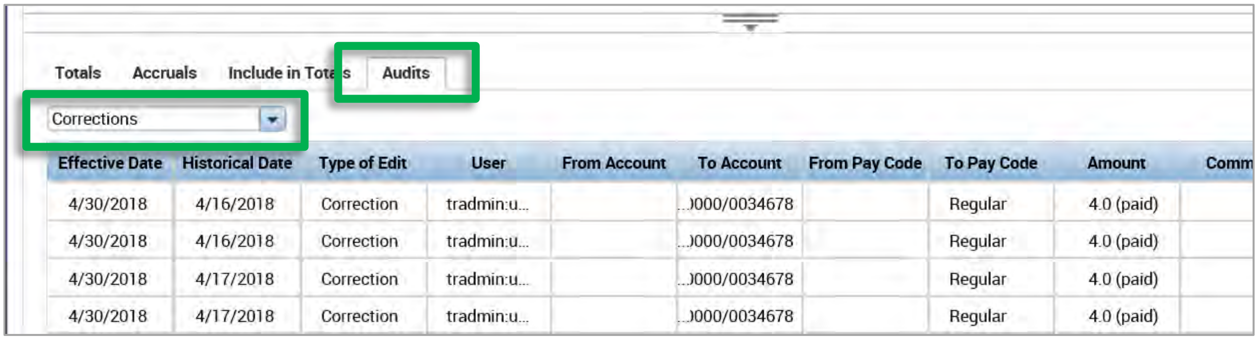
Audits Tab (TIM Administrators Only)

TIM Administrators can easily view the Corrections audit in the timecard for the pay period selected by using the Audits tab.

1. Click the Show Timecard Tabs icon.



2. Click the Audits tab.
3. Select Corrections from the category drop-down list.



Effective Date	Historical Date	Type of Edit	User	From Account	To Account	From Pay Code	To Pay Code	Amount	Comm
4/30/2018	4/16/2018	Correction	tradmin:u...		...)000/0034678		Regular	4.0 (paid)	
4/30/2018	4/16/2018	Correction	tradmin:u...		...)000/0034678		Regular	4.0 (paid)	
4/30/2018	4/17/2018	Correction	tradmin:u...		...)000/0034678		Regular	4.0 (paid)	
4/30/2018	4/17/2018	Correction	tradmin:u...		...)000/0034678		Regular	4.0 (paid)	

Modify Historical Corrections Via the HC Accruals Adj Tab (TIM Administrators Only)

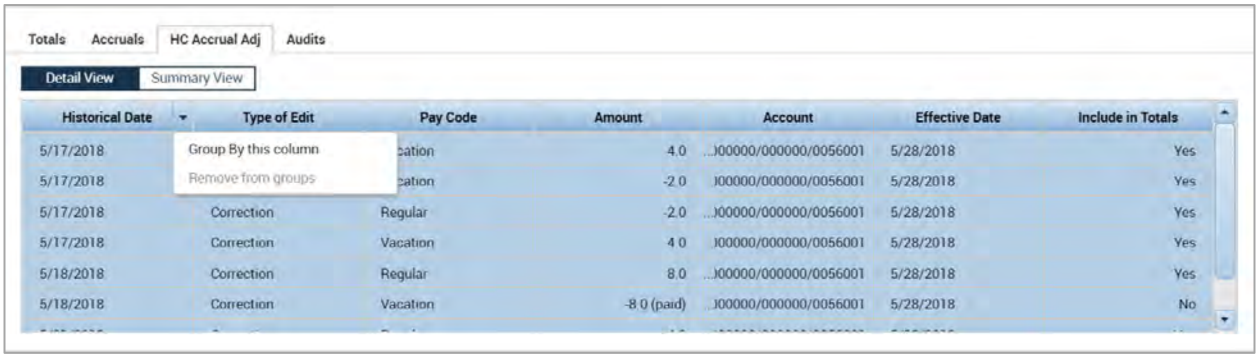
When Historical Corrections are made to adjust leave balances, those hours should not be sent to payroll. Those edits are made in the timecard to increase or decrease the employee's accrual balance in TIM. You will need to adjust the correction to **not** be included in the timecard totals. The HC Accruals Adj tab allows you to view each Historical Correction that has been made to the selected pay period or time period and modify the Include in Totals option. Only TIM Administrators have access to the HC Accrual Adj tab.

- **Historical Date** refers to the date in the timecard that was correctly.
- **Amount** shows the number of hours added or subtracted.
- **Effective Date** is the last day of the pay period in which the hours will be added or subtracted from the totals and sent to payroll.

Each correction will show up on its own line. If you have revised a specific line in the timecard more than once, each revision will be listed separately. If a signed-off pay period has been corrected multiple times the list of corrections in the HC Accrual Adj tab can get confusing.

Simplify the HC Accrual Adj tab by grouping columns.

1. Select the pay period that was corrected.
2. Click on the HC Accrual Adj tab
3. Hold your mouse over Historical Date and select Group by this Column
4. Hold your mouse over Pay Code and select Group by this Column.



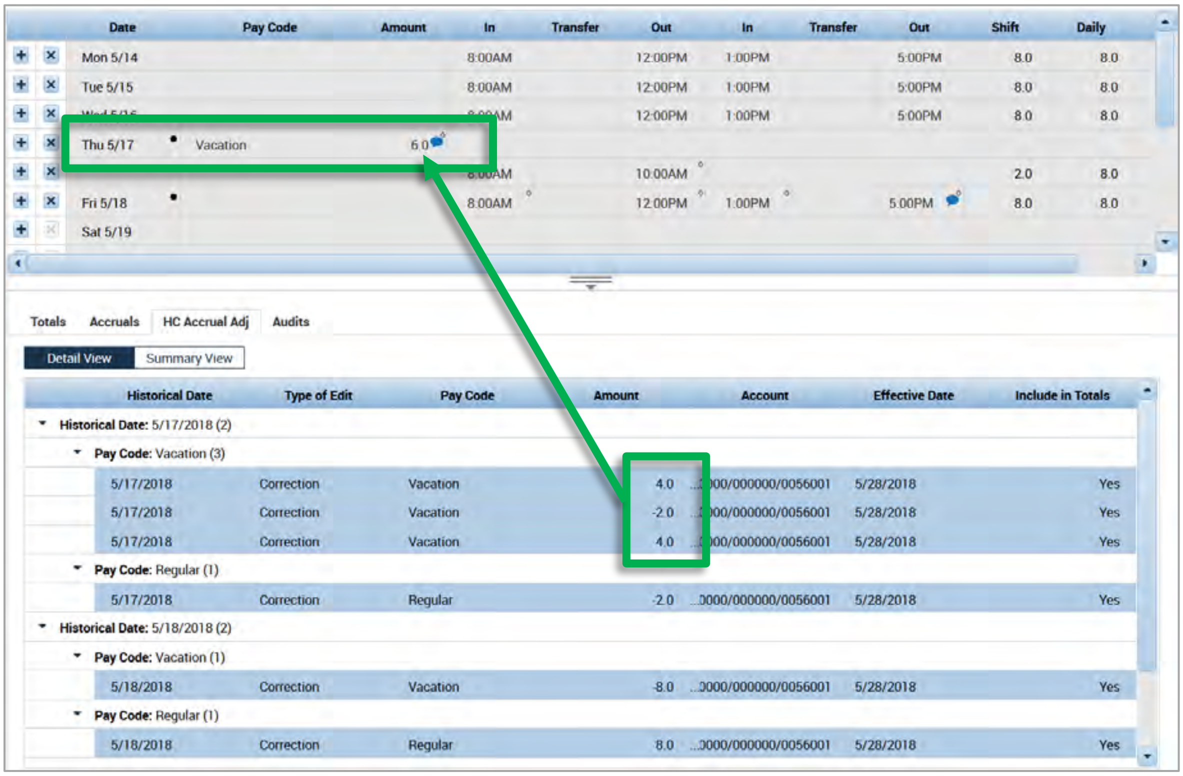
Data that appears in the HC Accruals Adj tab

In the example below the vacation hours on 5/17/2018 were revised several times.

a. Four hours of vacation were added in the Amount column on the timecard. The HC Accrual Adj tab shows 4 hours added.

b. The 4 hours of vacation was changed to 2 in the timecard. The HC Accrual Adj tab shows 2 hours subtracted. (2=4-2)

c. Also,the 2 hours in the timecard were increased to 6. The HC Accrual Adj tab shows 4 hours added. (6=2+4)



When you view the corrections in the Audit or Include in Totals tabs every correction that you have made in the timecard will be listed.

Don't worry – the system does all of the needed calculations to provide the correct results in the timecard Totals tab. You just need to make sure the timecard accurately reflects the employee's actual time worked and leave taken.

Understanding Historical Leave Balance Adjustments and Pay Totals

Most Historical Corrections **should** impact an employee's upcoming paycheck, either by adding to or subtracting from the pay they will receive. However, when setting up new hires in TIM and when terminating employees certain actions may include corrections to update the employee's accrual balances that **should not** directly impact their upcoming pay totals. In these situations the TIM Administrator will need to adjust the correction to indicate that the upcoming pay (or "totals") should not be affected.

*Common leave balance adjustment situations when corrections **should NOT** impact pay totals*

- An employee who qualifies to earn leave at the end of each month terminates their employment on the 25th of the month. The employee's leave hours for the month will not be added automatically to their accruals since they will not be active in TIM on the last day of the month. The accruals need to be added as Historical Corrections, but the corrections **should not** impact pay. (The employee will receive the payout in a later step. For details on this process, see Termination: Balancing Final Accruals starting on page 115.)
- A new hire transferred to the University from another North Carolina agency. The employee has accrual hours from their previous state service that need to be added to TIM. The accrual hours will be available for the new hire to use, but **should not** impact the upcoming pay.

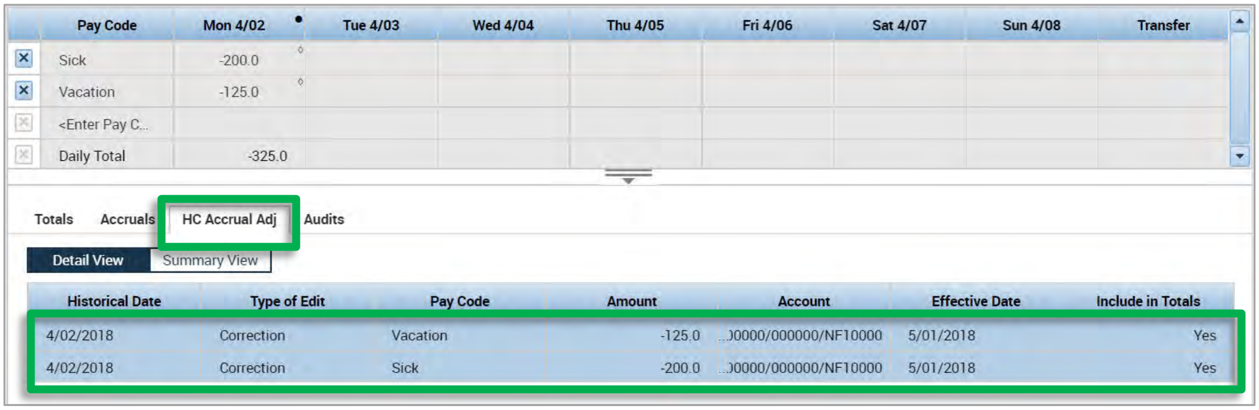
Stop TIM from Sending Historical Leave Balance Adjustments to Payroll (TIM Administrators Only)

As of the July 2018 TIM update, when saving Historical Corrections the popup box asking whether or not the hours should be included in totals will no longer appear. All Historical Corrections will automatically be included in the timecard totals, and, if accrual hours are involved, will also affect the accruals balance. As stated above, most historical correction should be sent to payroll. The following steps are only needed in specific situations when accrual balances need to be updated in TIM, typically involving new hires and terminations.

To edit a saved historical correction so that accrual hours will not be sent to Payroll:

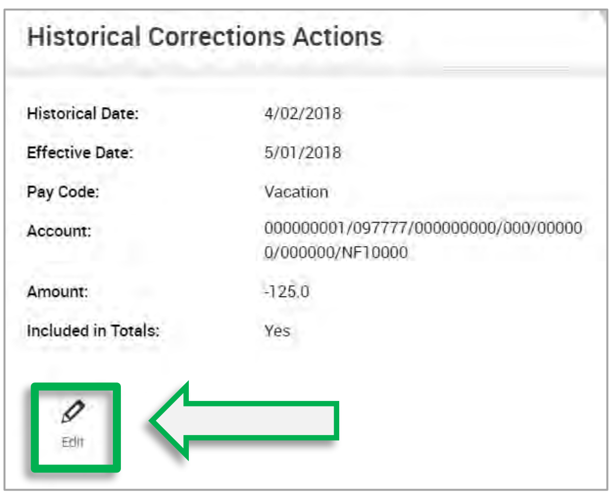
4. Click the Show Timecard Tabs icon.

5. Click the HC Accruals Adj tab.
6. Right-click on the correction or corrections that need to be set to No.

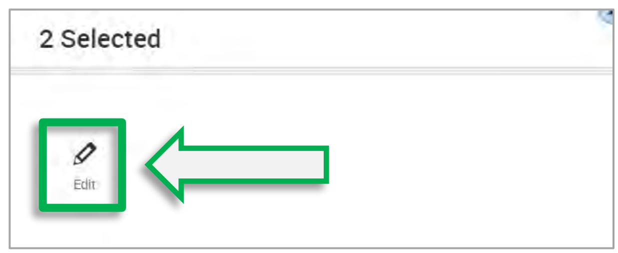


7. On the Historical Corrections Actions dialogue click Edit.

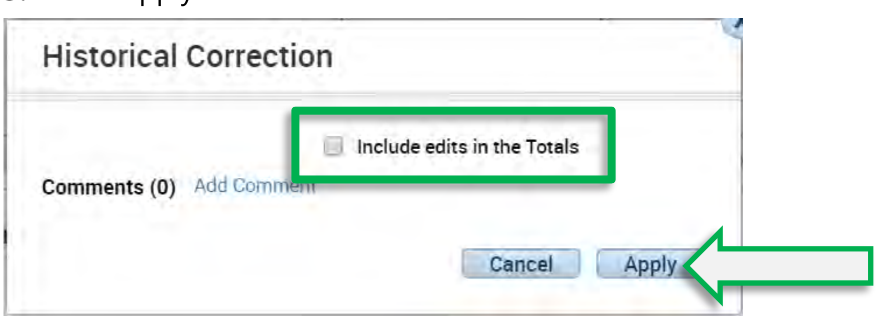
Dialogue with one correction selected



Dialogue with two corrections selected



8. Deselect Include edits in the Totals.
9. Click Apply



❖ The Historical Correction dialogue includes an option to Add a Comment. Comments that you add here will not show up as blue text balloons on the timecard, so always add your comments by right-clicking on the cell in the timecard.

Historical Correction Scenarios

Historical Corrections directly affect an employee's paycheck and leave accrual, so it is important to understand the implications of the changes you make. Use the following scenarios to get practice using Historical Corrections in specific situations.

When working through the scenarios refer to the step-by-step instructions starting on page 92 if needed.

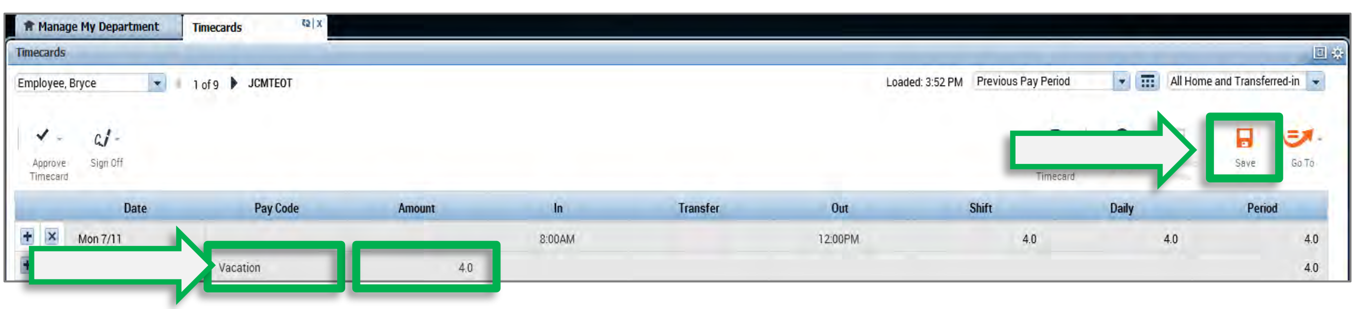
Scenario #1: Leave Hours Not Entered and Not Paid

Bryce took 4 hours of Vacation on July 7 and forgot to enter them into his timecard. His paycheck for the period was short by 4 hours.

The TIM Administrator needs to add the 4 vacation hours into Bryce's timecard on the date taken (July 7) and make sure that he receives pay for the 4 hours in his next paycheck.

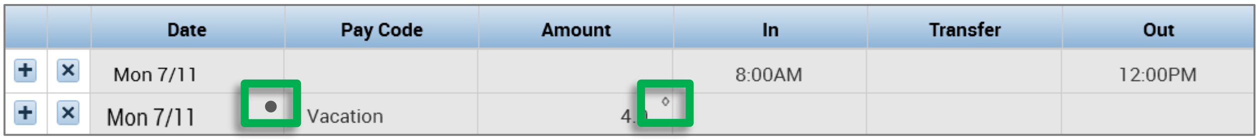
Steps:

1. Enable Edits for all employees.
2. Open Bryce's timecard.
3. You will need to enter leave hours on the actual date that they were taken. Go to the time period that needs to be corrected.
4. Next, click into the Pay Code field and select the appropriate Pay Code. For this example you would select Vacation. Then enter the hours into the Amount field and click Save.



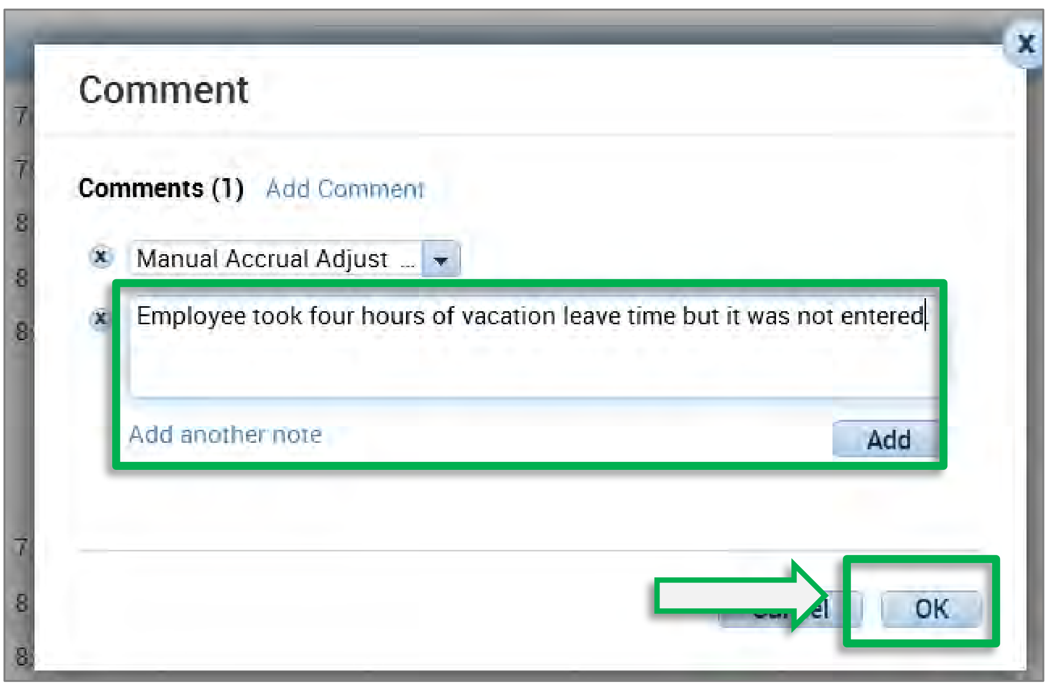
5. Click OK when the message appears warning you that the timecard has been corrected, then click Save again.

After you save the corrections a small diamond will appear in the cell and a dot will appear next to the affected date, indicating that a Historical Correction has been made.

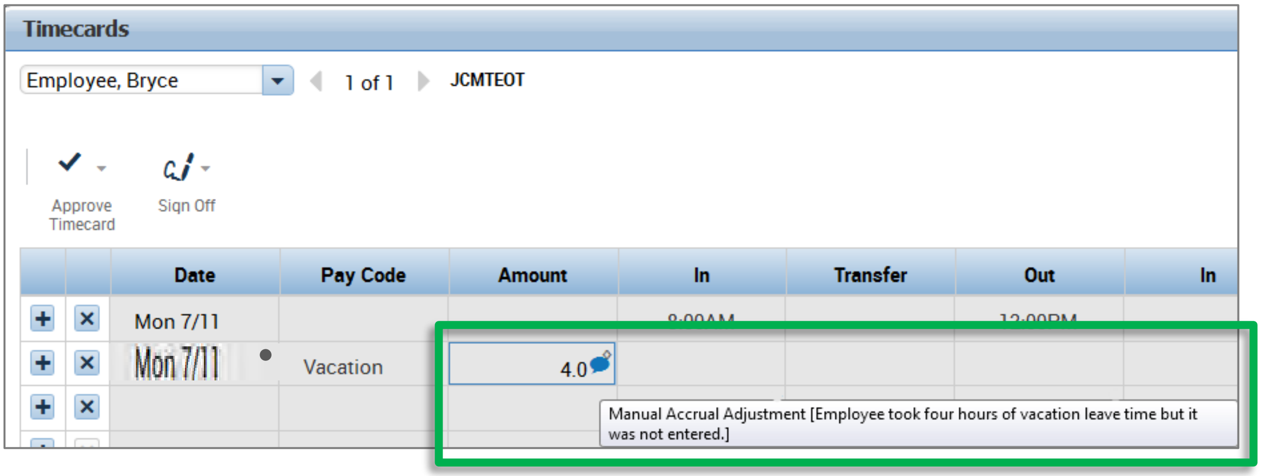


- The Vacation hours added to the corrected pay period need to be included in Bryce's next paycheck.
- You do not need to revise the Include in Totals setting since Yes is the default.

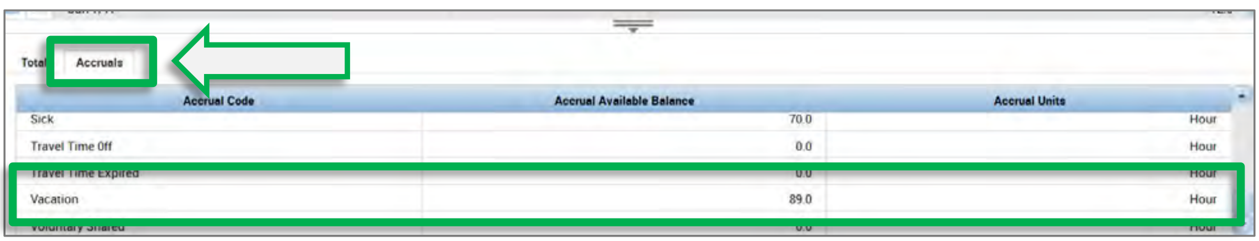
6. Click Refresh to activate the timecard.
7. Right click on the cell that contains the diamond to add a Comment and a Note, then click Comments.
8. This correction will affect Bryce's vacation accruals, so select Manual Accrual Adjustment from the dropdown list.
9. Enter a detailed note explaining why the Historical Correction is being made and save the comment.



10. Hover over the modified cell to view the comment you added.

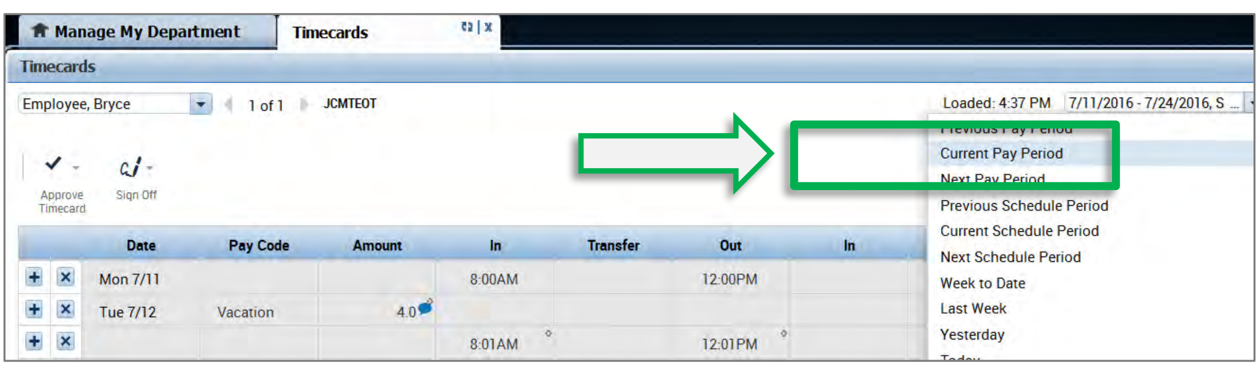


11. To view Bryce's accrual balance after making the Historical Correction, select the cell in the timecard that was modified.
12. Go to the Accruals tab and scroll down to Vacation.

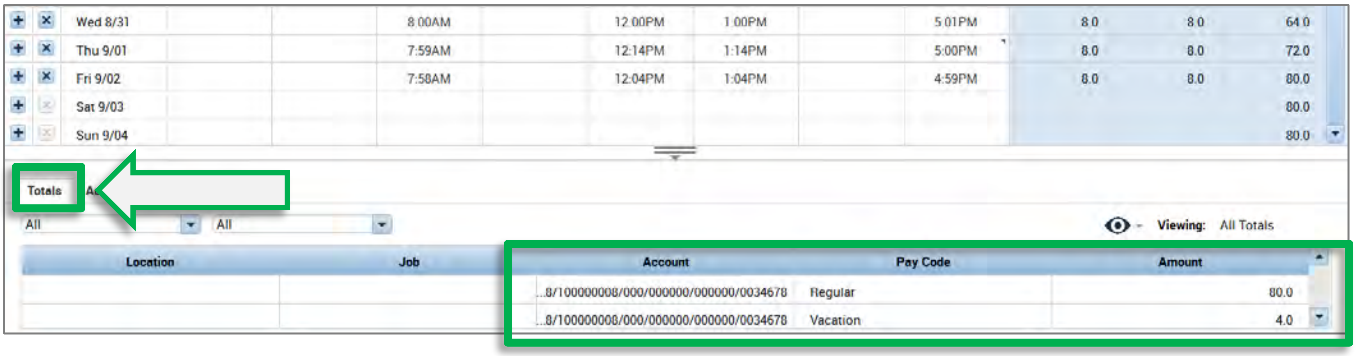


The Vacation accrual will show that four hours of vacation leave have been used. (To see what the accrual was before the correction, click on the previous day in the timecard, in this case July 6. It will show that Bryce's vacation accrual was 93 hours.)

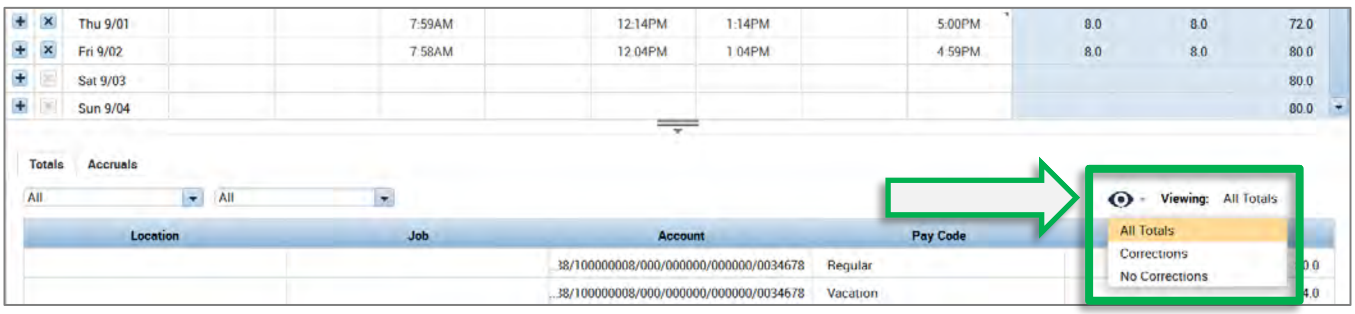
13. To view how the Historical Correction impacted the totals that will be sent to payroll for Bryce's upcoming paycheck, select Current Pay Period.



14. Go to the Totals tab. The Amount column displays all of the hours that will be sent to payroll when the pay period closes.



15. If the pay period has not been signed off yet, you can also click the Eye icon to view only the corrections or none of the corrections.



End Result

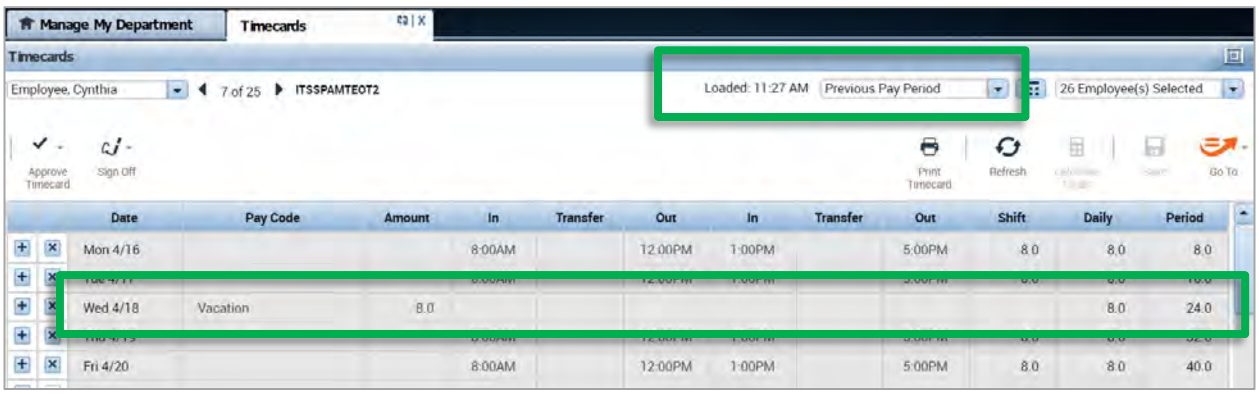
- The correction reduced Bryce's Vacation accrual by 4 hours.
- The correction added 4 hours of pay to Bryce's current pay period Totals.

Scenario #2: Hours Worked and Paid Were Entered as Vacation

Cynthia planned to take a day off to play golf. Unfortunately, the weather was horrible, so she ended up working instead. She had already entered the time as vacation and forgot to change it to hours worked before the pay period ended. She was paid for the 8 hours, but those hours were subtracted from her vacation accrual. The TIM Administrator needs to change the hours from Vacation to Time Worked so that Cynthia's vacation hours will be restored.

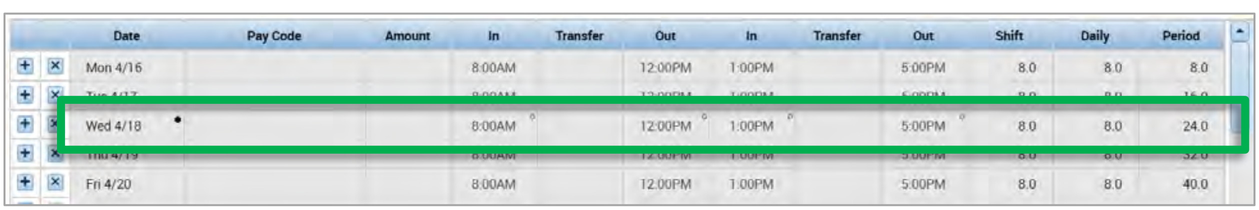
Steps:

1. Enable Edits for all employees.
2. Open Cynthia's timecard.
3. Go to the time period that needs to be corrected. Note the 8 hours of Vacation that need to be replaced with Time Worked.



4. Delete the Vacation hours on the day that the employee worked.
5. Add the hours back in as Time Worked.
6. Save the correction.
7. Click OK when the message appears warning you that the timecard has been corrected, then click Save again.

The Historical Correction indicators will appear in the revised cells.



End Result

- The correction added 8 hours back in to Cynthia's Vacation accrual.
- 8 hours or vacation time were removed (negative 8 hours) and 8 hours of work time (positive 8 hours) were added, so the net result is that Cynthia's upcoming paycheck will not be impacted.

Scenario #3: Previous State Service Accrual Balance Adjustment

Yolanda transferred in to her new Exempt position at UNC from the Department of Public Instruction (NCDPI), another state agency. She had accrued 125 hours of vacation and 200 hours of sick leave at NCDPI. She elected to not cash out her vacation accrual when she left NCDPI, so both accruals need to be transferred to TIM (sick leave can only be transferred, it cannot be cashed out). HR sends a memo to the TIM Administrator with details about the vacation and sick leave accrual balances that need to be added to Yolanda's accruals in TIM.

- Accruals from previous state employment are added in to TIM in one lump sum. They must be added to a time period that has been signed off.
- Note: This is similar to the process that you would follow for an employee who is terminating prior to the end of the month so that they will be paid out for the hours that they have accrued in the partial month. For details on this process, see Termination: Balancing Final Accruals starting on page 115.

About the Vacation and Sick Pay Codes

- ❖ The Vacation and Sick Pay Codes are used for two different kinds of tracking: hours used (+) and hours accrued (-).
- ❖ When an employee enters vacation or sick time used, it is entered as a positive number (hours for which the employee will be paid), and is included in the payroll total.
- ❖ When the system adds vacation or sick time accrued (on the last day of the month) or when it is added manually (in the case of a terminated employee) the time is added as a negative number (hours "credited" that are available to be used), and is not added to the payroll total.

Accruals that are Always Entered as a Positive Number

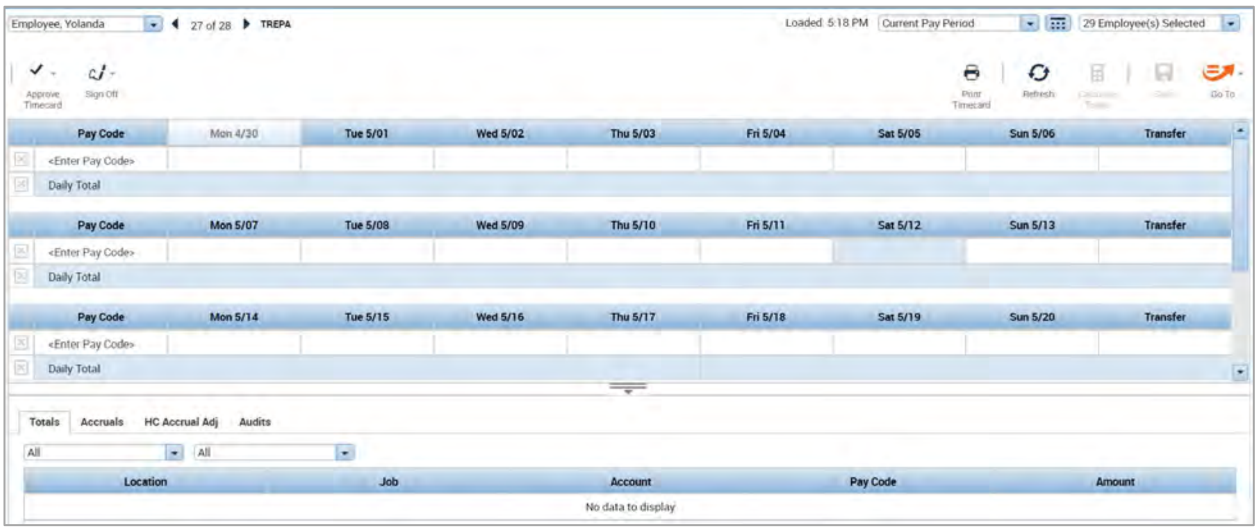
- ❖ Certain accruals, such as Comp Time and Travel Time, are entered using one pay code to increase the available balance (Comp Time Earned, Travel Time ETO) and another pay code to decrease the balance and add the amount to the payroll total (Comp Time Taken, Travel Time Taken).

❖ In the rare circumstance that these accruals need to be adjusted, the amount is always entered as a positive (+) number. Just be careful to select the correct pay code to reflect hours earned vs. hours taken.

Steps:

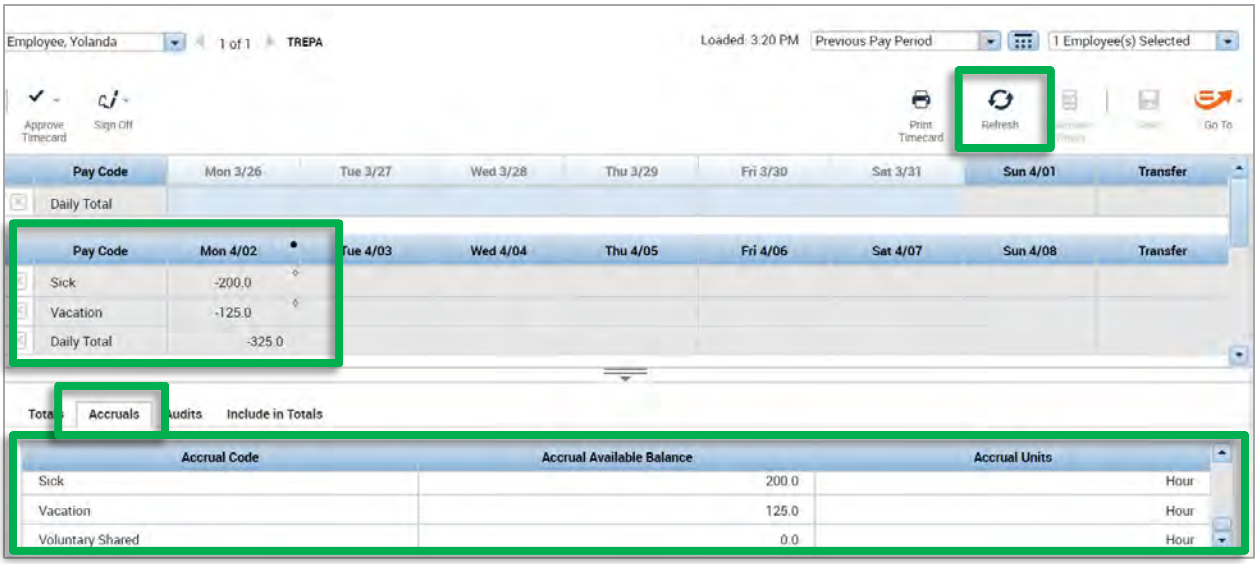
1. Enable Edits for all employees.
2. Open Yolanda's timecard.

Yolanda is an exempt employee, so her timecard looks different from most of the examples in this manual. Aside from the layout of the timecard being different, the processes for adding accruals for exempt and non-exempt employees are identical.



3. Select a time period prior to Yolanda's start date. It must be a pay period that has been signed off.
4. Click a cell in the <Enter Pay Code> column and select Sick from the pay code list.
5. Click in the date column and enter the amount of sick leave hours that were carried over from the previous state agency. Yolanda has 200 hours of sick leave from NCDPI, so enter -200.
6. Go to the next <Enter Pay Code> column and select Vacation from the pay code list.
7. Click in the same date column, this time in the Vacation row and enter -125 to show the 125 hours that Yolanda carried over from NCDPI.

8. Click Save.
9. Click OK when the message appears warning you that the timecard has been corrected, then click Save again.
10. Click the Accruals tab to see that these hours have been added to the Sick and Vacation accruals as positive numbers. You may need to click Refresh before moving on to the next step.

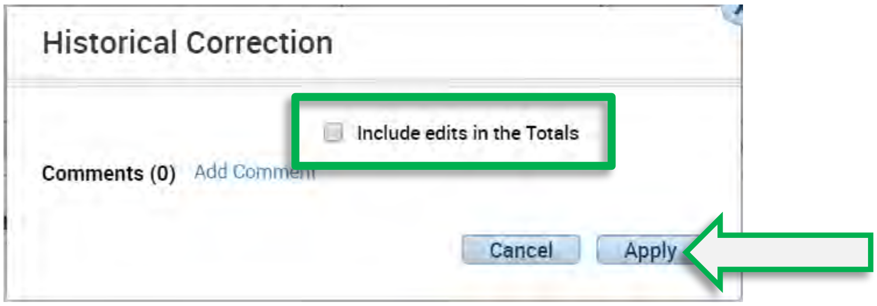


Yolanda should not be paid for these hours until they are used, so Include in Totals needs to be set to **No** for both entries.

11. Click the HC Accruals Adjust tab.

12. Select both entries and right click to open the Historical Corrections dialogue. You can also edit these one at a time, but it can save time to do both at once.
13. Deselect Include edits in Totals

14. Click Apply.



15. Remember to add a comment to the affected cell in the timecard to document why the accrued hours were added.

End Result

Yolanda now has access to use the 125 vacation and 200 sick hours she accrued in her previous state service at NCDPI. These hours will not be included in Totals and will not be sent to Payroll.

Termination: Balancing Final Accruals

When an employee terminates their employment with the University, all accrual balances—positive or negative—must be paid out, docked, transferred, or removed before submitting the final pay period to payroll.

Accrual balance steps must be followed **in this order**.

1. If the employee's last day is not the last day of the month, any accrual earned during the partial month should be added as a Historical Correction on the last day of the most recent signed-off pay period.
2. Any payout owed to the employee for the final accrual balance should be added on the last day of the final pay period.
3. Any negative leave balances should be docked from the last day of the final pay period.
4. Any final leave balances should be zeroed out on the last day of the final pay period.

1. Add Accrued Vacation and Sick Hours

When a permanent employee who qualifies for Vacation and Sick time terminates on the last day of the month, the system will automatically apply any Vacation or Sick time accrued for the month.

If, however, they terminate before the last day of the month, these steps will need to be entered manually into TIM.

- ❖ If you do not have access to enter historical corrections, you will need to pass on this information to the TIM Administrator who processes historical corrections.
- ❖ If you have questions about how to enter historical corrections, see the Entering Historical Corrections manual for more detail.

Verify Eligibility

1. Verify whether the employee qualifies for Vacation and Sick accruals. If you are not sure, check with your HR representative.
2. Verify whether the employee is eligible for payouts and how much they are eligible for. For payout guidelines see the Vacation Leave for SHRA Employees and Leave, Paid time off, Payouts and Transfers pages on the HR site.

Enter Historical Vacation and Sick Accruals

3. Find out how many Vacation and Sick hours the employee will have earned in the final Pay Period as of their termination date.
    - Run an Accrual Detail report to find how many hours of vacation and sick were earned in the previous month. For help see "Running Reports" on page 168.
    - Prorate the results to reflect the portion of the final month worked.

❖ It is also useful to check the total Vacation and Sick time available so that you can check your week at the end of this process.

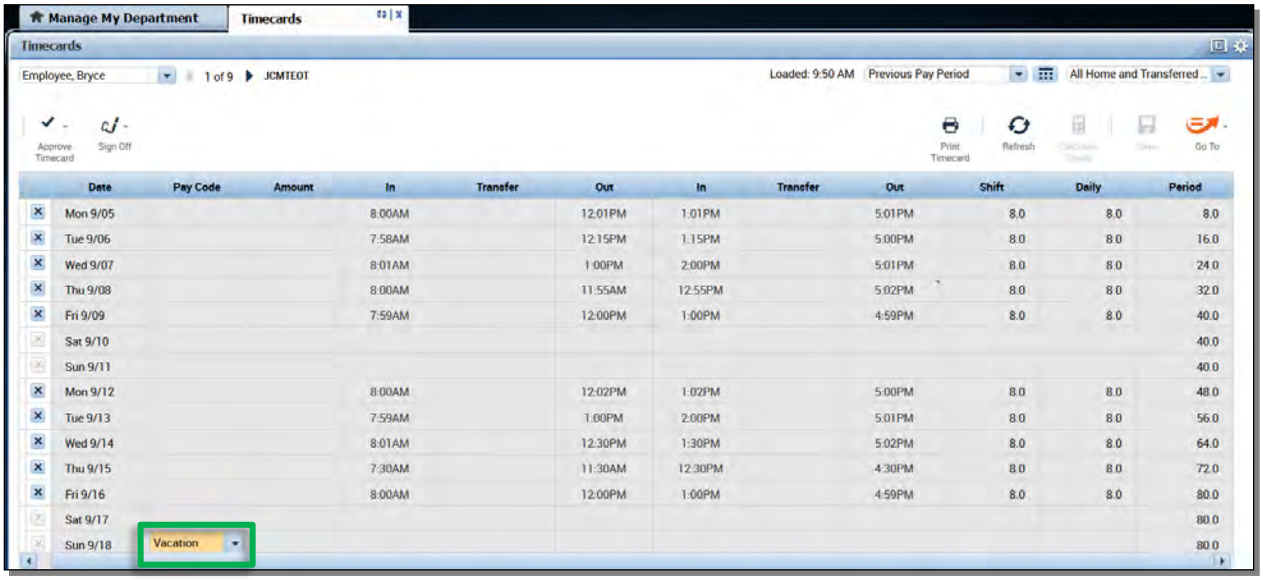
4. Add the accrued vacation and sick leave as a Historical Correction on the terminating employee's timecard. See the previous chapter for help adding Historical Corrections.

Reminders:

- Historical Corrections can only be applied to a signed off pay period, so if the current pay period has not been signed off, go to the previous pay period or select the most recent range of days that has been signed off. The accruals should be added to the last day of the selected period.
- When adding the accruals, enter them as a negative number. For example, 8 hours of vacation should be entered as -8.

5. On the Include in Totals tab, select each correction and change Include in Totals to No. Leaving it set to Yes would send the negative hours to payroll and the employee would be docked these hours in his or her last paycheck.

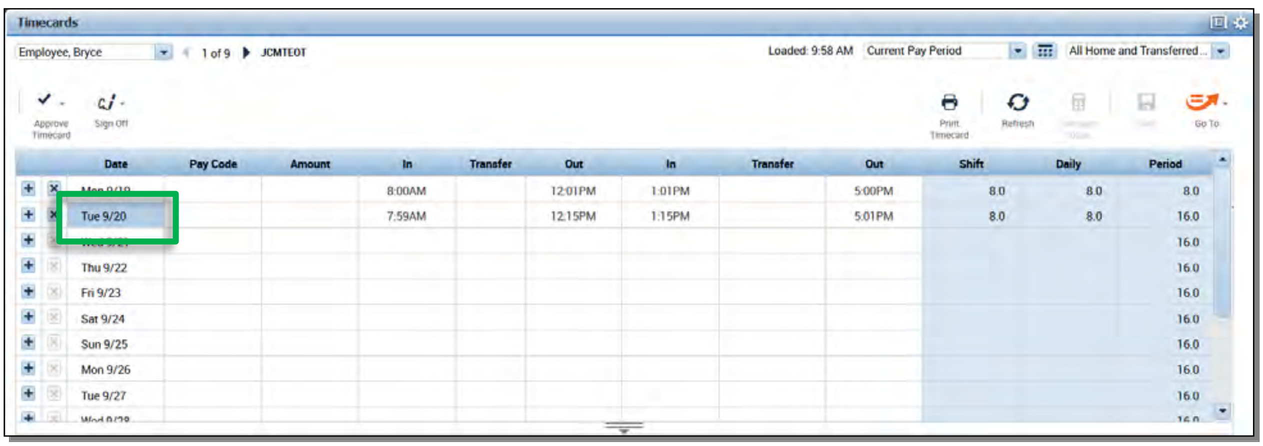
❖ Payment for the allowable accrual hours is a separate process. See Payout Vacation and Other Hours starting on page 118 for details.



Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Period
Mon 9/05			8:00AM		12:01PM	1:01PM		5:01PM	8.0	8.0	8.0
Tue 9/06			7:58AM		12:15PM	1:15PM		5:00PM	8.0	8.0	16.0
Wed 9/07			8:01AM		1:00PM	2:00PM		5:01PM	8.0	8.0	24.0
Thu 9/08			8:00AM		11:55AM	12:55PM		5:02PM	8.0	8.0	32.0
Fri 9/09			7:59AM		12:00PM	1:00PM		4:59PM	8.0	8.0	40.0
Sat 9/10											40.0
Sun 9/11											40.0
Mon 9/12			8:00AM		12:02PM	1:02PM		5:00PM	8.0	8.0	48.0
Tue 9/13			7:59AM		1:00PM	2:00PM		5:01PM	8.0	8.0	56.0
Wed 9/14			8:01AM		12:30PM	1:30PM		5:02PM	8.0	8.0	64.0
Thu 9/15			7:30AM		11:30AM	12:30PM		4:30PM	8.0	8.0	72.0
Fri 9/16			8:00AM		12:00PM	1:00PM		4:59PM	8.0	8.0	80.0
Sat 9/17											80.0
Sun 9/18	Vacation										80.0

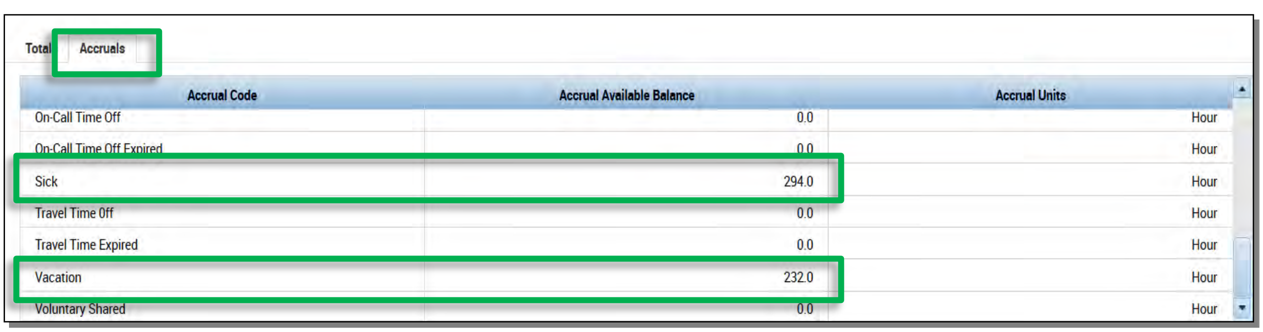
Double Check Your Work

6. In the employee's final pay period, click on the last day worked.



Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Period
[illegible]			8:00AM		12:01PM	1:01PM		5:00PM	8.0	8.0	8.0
Tue 9/20			7:59AM		12:15PM	1:15PM		5:01PM	8.0	8.0	16.0
[illegible]											16.0
Thu 9/22											16.0
Fri 9/23											16.0
Sat 9/24											16.0
Sun 9/25											16.0
Mon 9/26											16.0
Tue 9/27											16.0
[illegible]											[illegible]

7. Go to the Accruals tab.
8. Scroll down within the Accruals list to check the Sick and Vacation balances.



Accrual Code	Accrual Available Balance	Accrual Units
On-Call Time Off	0.0	Hour
On-Call Time Off Expired	0.0	Hour
Sick	294.0	Hour
Travel Time Off	0.0	Hour
Travel Time Expired	0.0	Hour
Vacation	232.0	Hour
Voluntary Shared	0.0	Hour

9. Check to be sure that the Accrual Available Balances are equal to [the original amounts identified on page 116] + [the amount accrued in the final pay period.]

- ❖ Despite the fact that you entered the final Vacation and Sick time accrued as negative numbers, the Accruals tab displays them as positive numbers.
- ❖ For example, if the starting balance for Vacation was 241 and for Sick was 166, then you inserted -11 vacations hours and -8 sick hours, the final balances should be Vacation 254 (241 + 11) and Sick 174 (166 + 8).

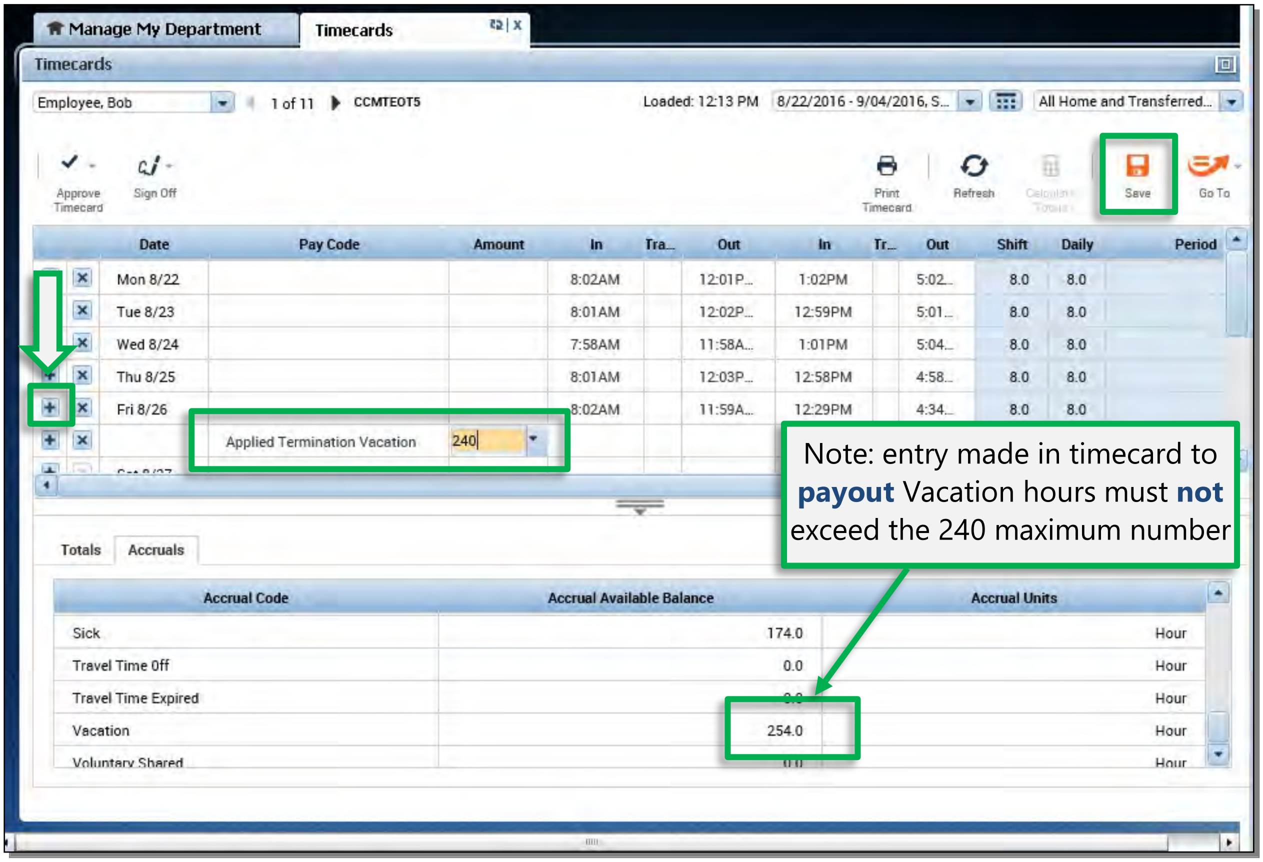
2. Payout Vacation and Other Hours

If an employee is eligible for a leave or other payout on termination, the number of hours to be paid out must be added to the final day worked. For payout guidelines see the Vacation Leave for SHRA Employees and Leave, Paid time off, Payouts and Transfers pages on the HR site.

Vacation Hours

- ❖ For most employees the maximum amount of Vacation that can be paid out is 240 hours (30 days). Payout maximum is decreased for part-time employees and employees who have worked less than 24 months.
- ❖ Using the steps described on page 116, identify the number of Vacation hours the employee has accrued. If the vacation accrual shows a negative balance, jump ahead to "Dock Overdrawn Vacation and Sick Hours" on page 120.

1. Add a new line to the last day worked.
2. In the Pay Code cell, select Applied Termination Vacation from the drop-down.
3. In the Amount cell, type in the number of hours accrued, up to maximum (240 hours or less depending on length of service and hours worked per week).
4. Click Save



Other Types of Accrued Hours

5. Repeat the steps above to payout any Bonus, Comp time, Holiday ETO, and Travel ETO balances.
6. Be sure to select the appropriate Pay Code for each, e.g. Applied Termination Bonus etc.

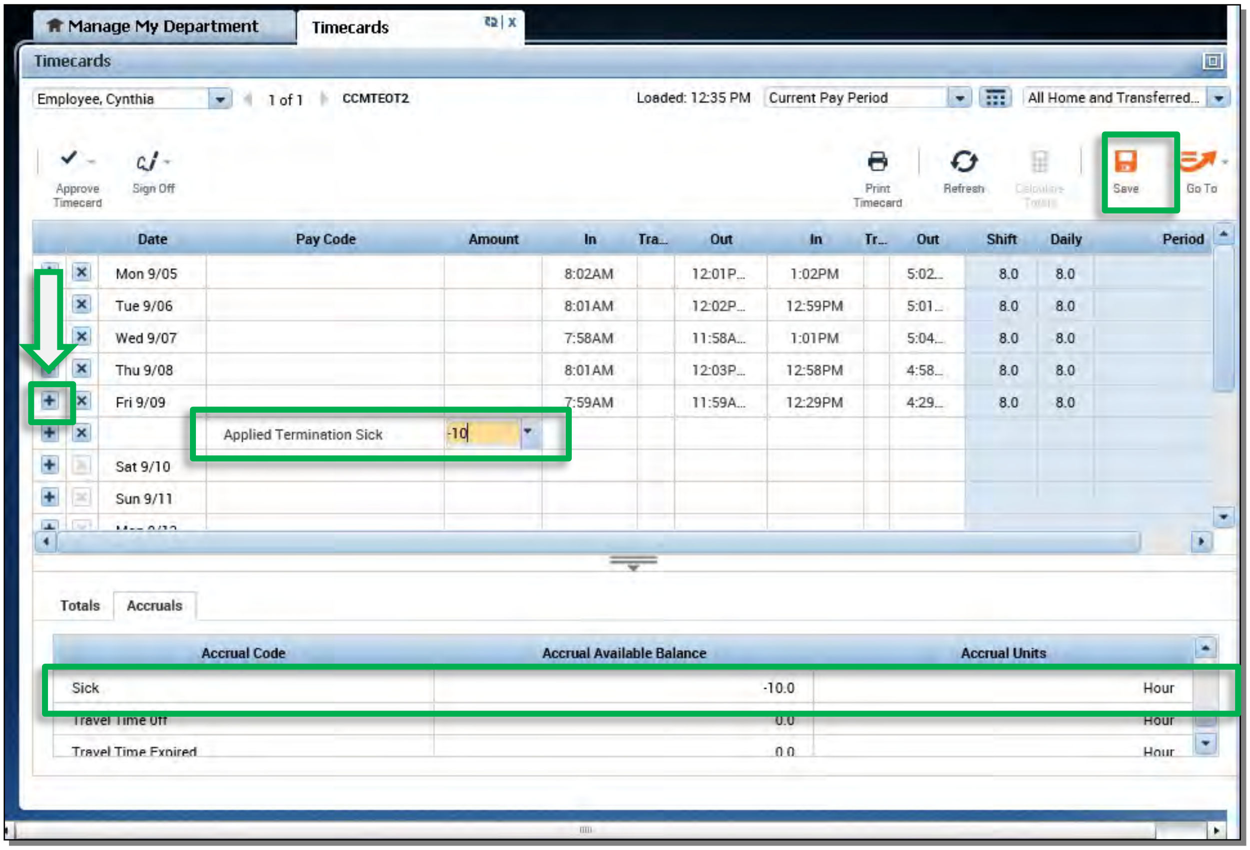
❖ There is no limit on the number of hours that can be paid out for Bonus, Comp time, Holiday ETO, and Travel ETO.

❖ Accrued sick time cannot be paid out. However, the following options are available for Sick Leave balances:
  • If moving to another North Carolina state position, Sick hours will transfer with you.
  • If you return to state employment after termination, your sick hours will be restored after five years of continuous employment.
  • You can transfer the hours to an approved employee or to the Voluntary Shared Leave program.

3. Dock Overdrawn Vacation and Sick Hours

If an employee has used more Sick or Vacation hours than they have accrued, their final pay will need to be docked to make up for the negative balance. The process for Docking Accruals is the same as for Accrual Payouts, except that amounts are entered as negative numbers.

1. Identify the overdrawn Sick or Vacation hours to be docked.
2. Add a new line to the last day worked.
3. In the Pay Code cell enter Applied Termination Sick or Applied Termination Vacation.
4. In the Amount cell enter the number of hours overdrawn as a **negative number**.
5. Click Save.



4. Remove Remaining Accrual Balances

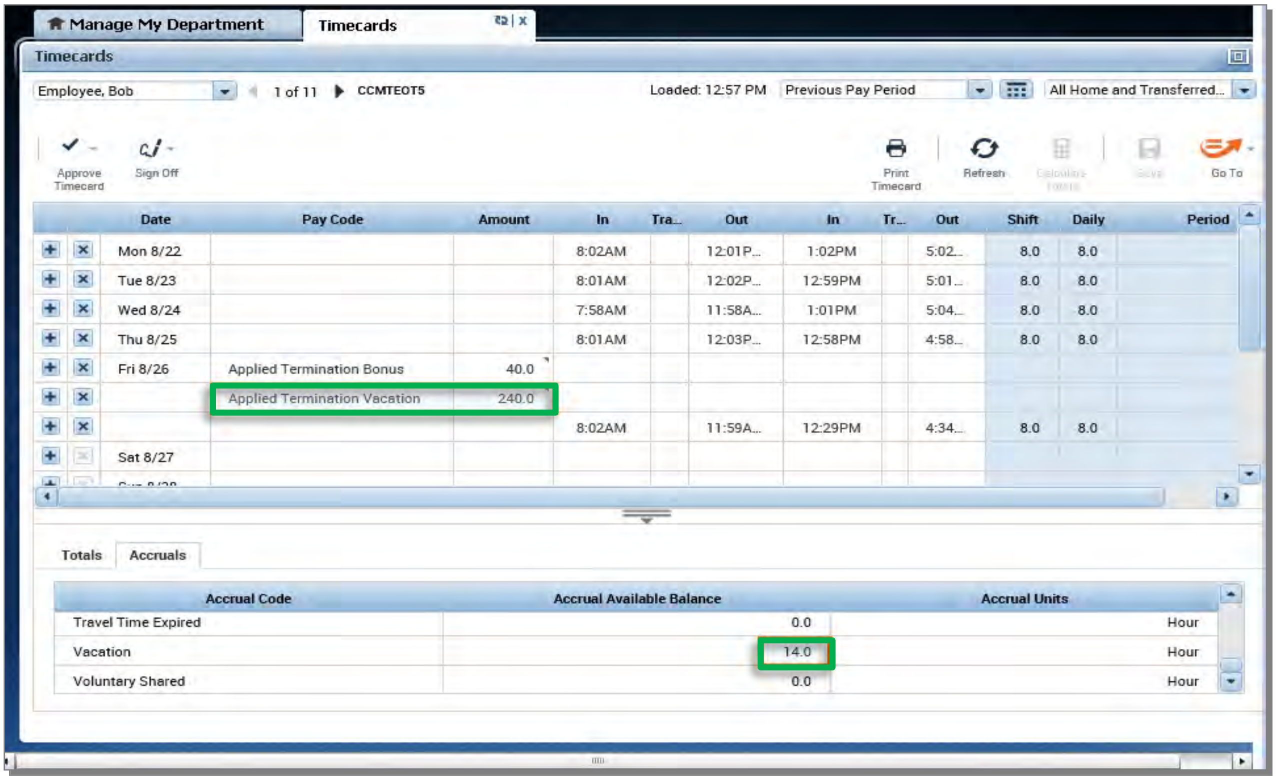
❖ If you need to pay out or dock accruals, **you must do this** before zeroing out or transferring the accrual balances.

Identify Remaining Accrual Balances

1. Open the employee's timecard and click on the last day worked.
2. Click the Show Timecard Totals tab, then go to the Accruals tab.
3. Scroll through the list of Accruals to see if there are any remaining balances.
    - There may be a remaining Vacation balance if the employee's original Vacation balance exceeded the number of hours that could be paid out. In the example

below, the employee had an original balance of 254 Vacation hours. The 240 hour maximum was paid out, leaving a balance of 14 hours to be removed.

- There is often a Sick balance that needs to be removed in TIM at termination.



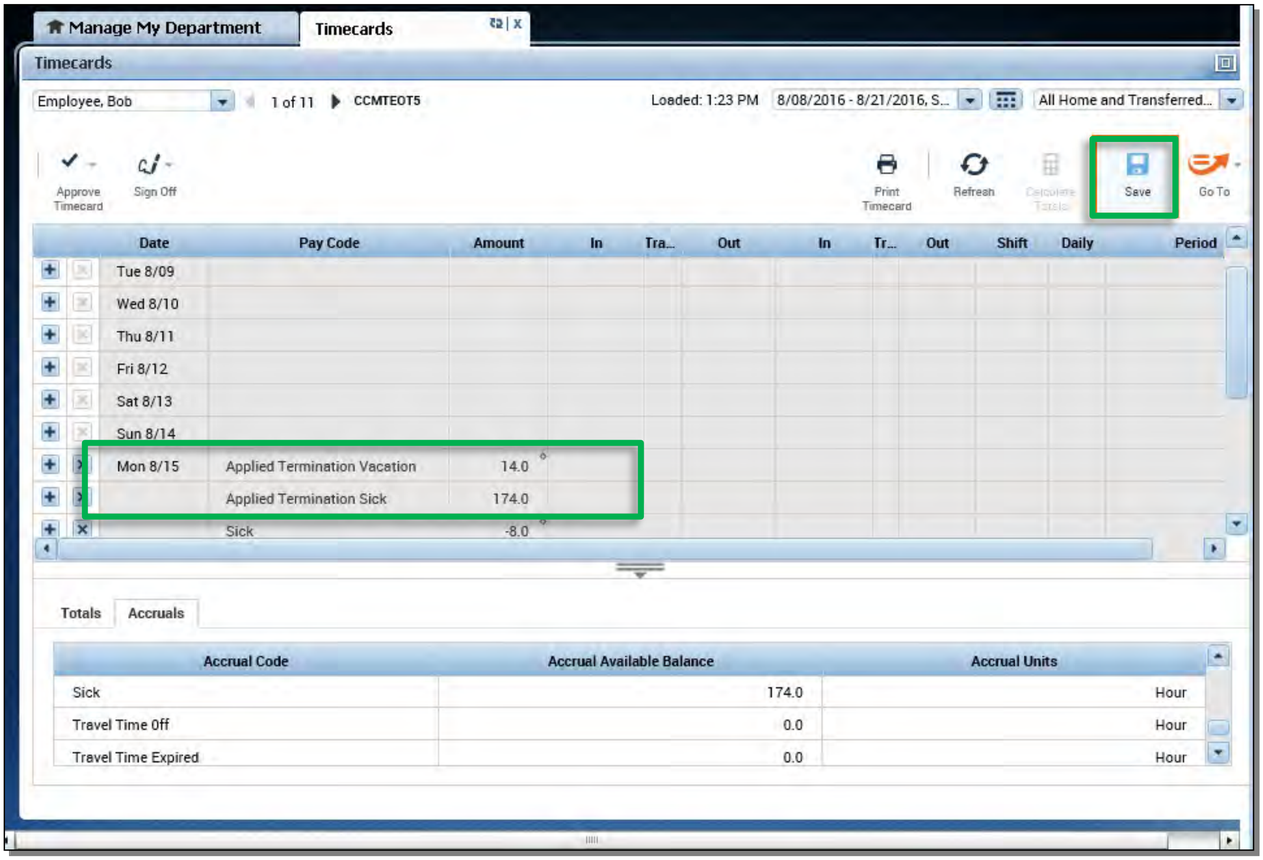
4. Make a note of all of the remaining balances in the list.

Remove the Remaining Accrual Balance

5. Enter historical corrections for the remaining accruals on the last day of the most recent sign-off pay period.
6. In the Pay Code cell select the appropriate Pay Code. The following Pay Codes can be used to zero out an employee's accrual balances:
    - Applied Termination Bonus
    - Applied Termination Comp Time
    - Applied Termination Holiday ETO
    - Applied Termination OCTO (On Call Time Off)
    - Applied Termination Sick
    - Applied Termination Travel ETO
    - Applied Termination Vacation

   In this example, we will use both Applied Termination Vacation and Applied Termination Sick.

7. In the Amount cell enter the remaining Vacation balance as a **positive number**. (You are adding to the number of vacation hours used or unavailable.)
8. In this example, there is also Sick Leave remaining, so it must be removed by repeating the steps above using the Pay Code Applied Termination Sick, and again entering the balance as a **positive number**.



9. Click Save.
10. On the HC Accrual Adj tab, select these corrections and set Include in Totals to No. See page 101 for help with the HC Accrual Adj tab.

Customized Hyperfinds (TIM Administrators Only)

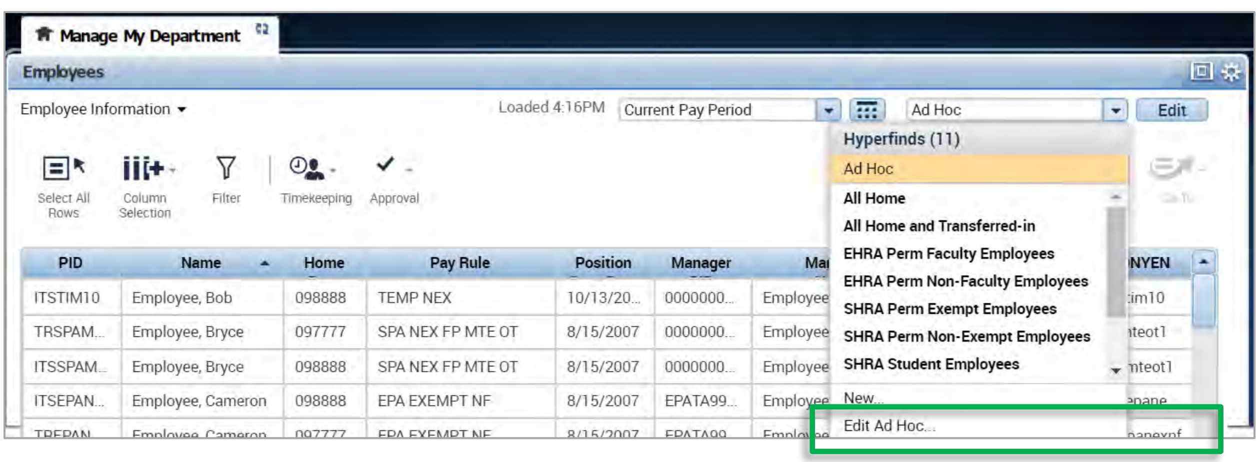
In addition to the public hyperfinds, TIM Administrators have the option to create custom hyperfinds. This allows administrators, who manage a large number of departments, to pull up a list of selected departments. This is especially useful when doing pay period close or reconciling timecards.

TIM has two types of customizable hyperfinds:

- **Ad Hoc**—Use this to setup a temporary custom hyperfind. Your customizations stay active in your workspace until you modify the Ad Hoc hyperfind again or log out of TIM.
- **Personal**—Create personal hyperfinds for very frequently reviewed departments. You can name these hyperfinds, and they will stay in your Hyperfind Selector. You should create an Ad Hoc hyperfind and review it to make sure it works as expected first. If you will use the selection frequently in the future, you may then elect to save it as a personal hyperfind. Instructions on how to create an ad hoc hyperfind and review it before saving it as a personal hyperfind are below.

Create a Temporary Ad Hoc Hyperfind

1. Select Edit Ad Hoc . . . from the bottom of the Hyperfind Selector list.



This opens the Hyperfind Queries dialogue. We will demonstrate selecting specific departments.

Use Ad Hoc to Display One or More Departments

2. On the Select Conditions tab select Primary Account.
3. Within Primary Account select Department.

4. Before you select your department(s), decide whether you want to **Include** or **Exclude** the department(s) you will be adding to the hyperfind condition.

   You will usually leave this set to Include, but if you want to view all of your departments Except for the one(s) you identify, select the 'Exclude people who meet this condition' button instead.

5. Enter the department name or number in the Available Items box to search using one of the options below:

   If you know the department number:

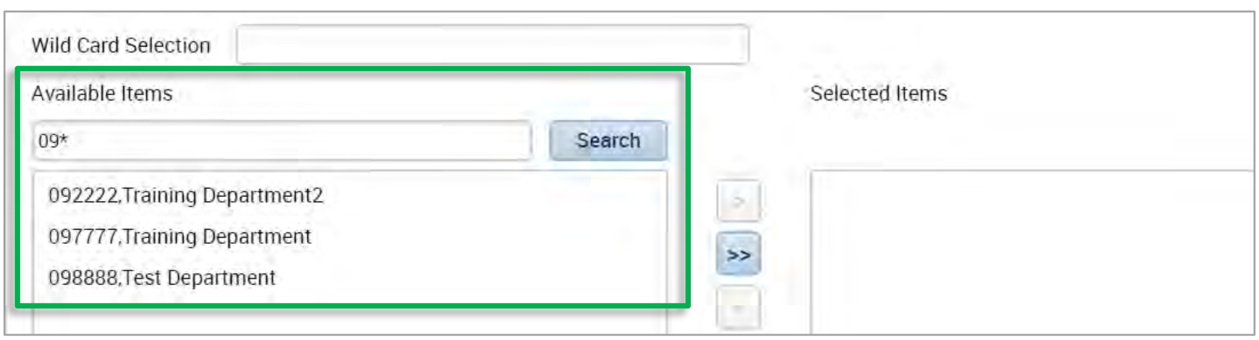
   Enter it into the Available Items box and click search.

If you don't know the department number but you know part of the name:

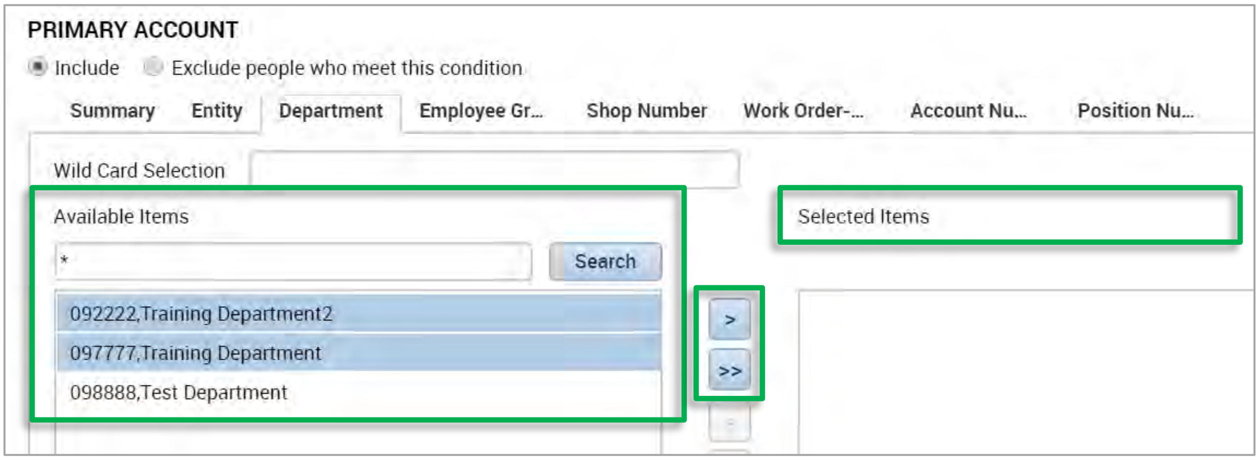
- In the example below we know that the department name includes the word "test," but we don't know the department number.
- Use an asterisk (*) as a wildcard at both the beginning and end of the word that is included in the department name.
- We type *test* into the search box and click Search. This brings up every department that the TIM Administrator has access to that has the word Test in it. In this case just one: 098888, Test Department.

If you want to find one or more departments that start with the same numbers:

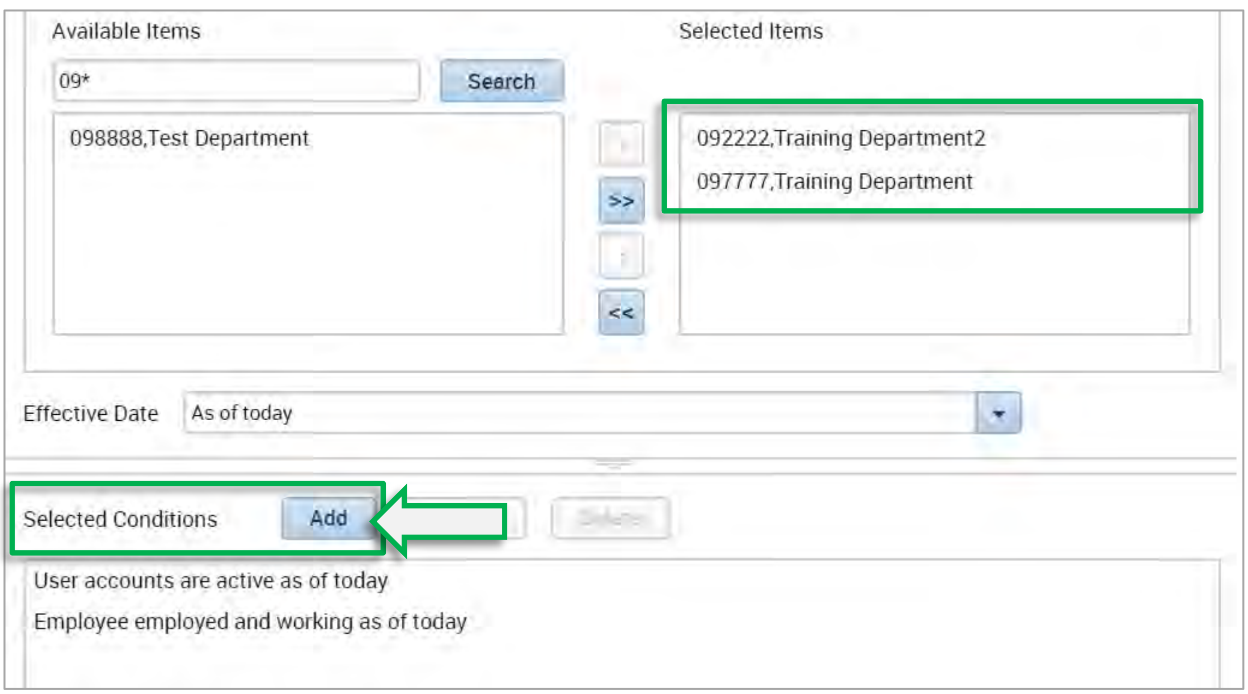
- For example, we want to find all employees we have access to who are in a training department. From experience we know that all the training departments in this example start with 09.
- We type 09* into the search box and click Search. This brings up all departments that we have access to in TIM that start with 09.



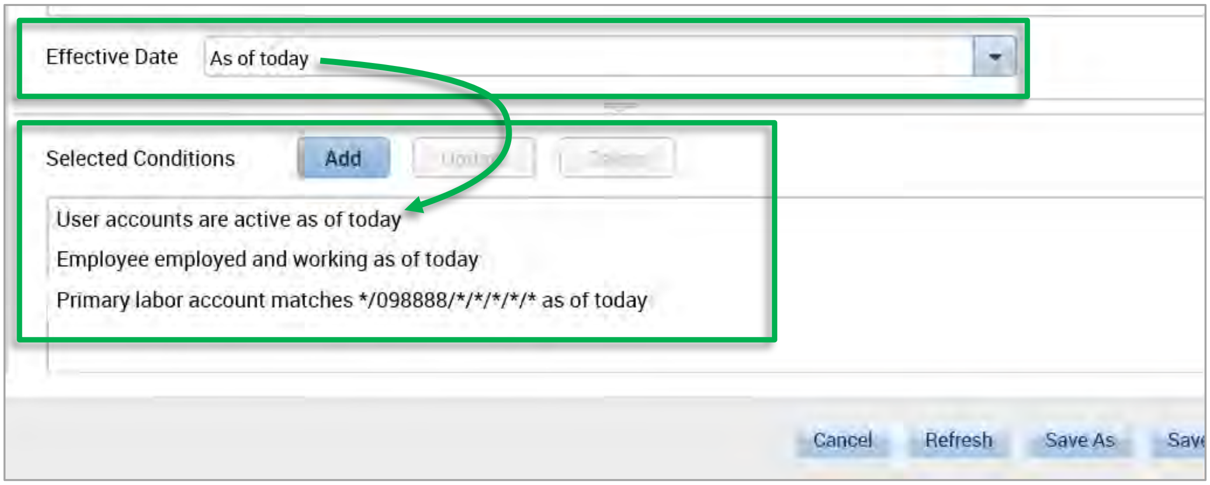
6. Move the department(s) you want to use into the Selected Items box.
   - The double arrow will move all items listed.
   - If you don't want all, click on the ones you do want and then click the single arrow to move the selected items.



7. At this point you could search for additional departments and add them to the Selected Items box if needed.
8. Once you have all the departments that you want to view in the Selected Items box, click the Add button to move them into the Selected Conditions list.



9. Review the list of Selected Conditions to verify that your settings are correct.
    - The Effective Date must always be left to "As of today" to avoid inadvertently overriding the conditions you specify. The Selected Conditions list shows this by default as "User accounts are active as of today."
    - By default, Ad Hoc hyperfinds also include any "Employee employed and working as of today."



Add Employment Status to an Ad Hoc Hyperfind

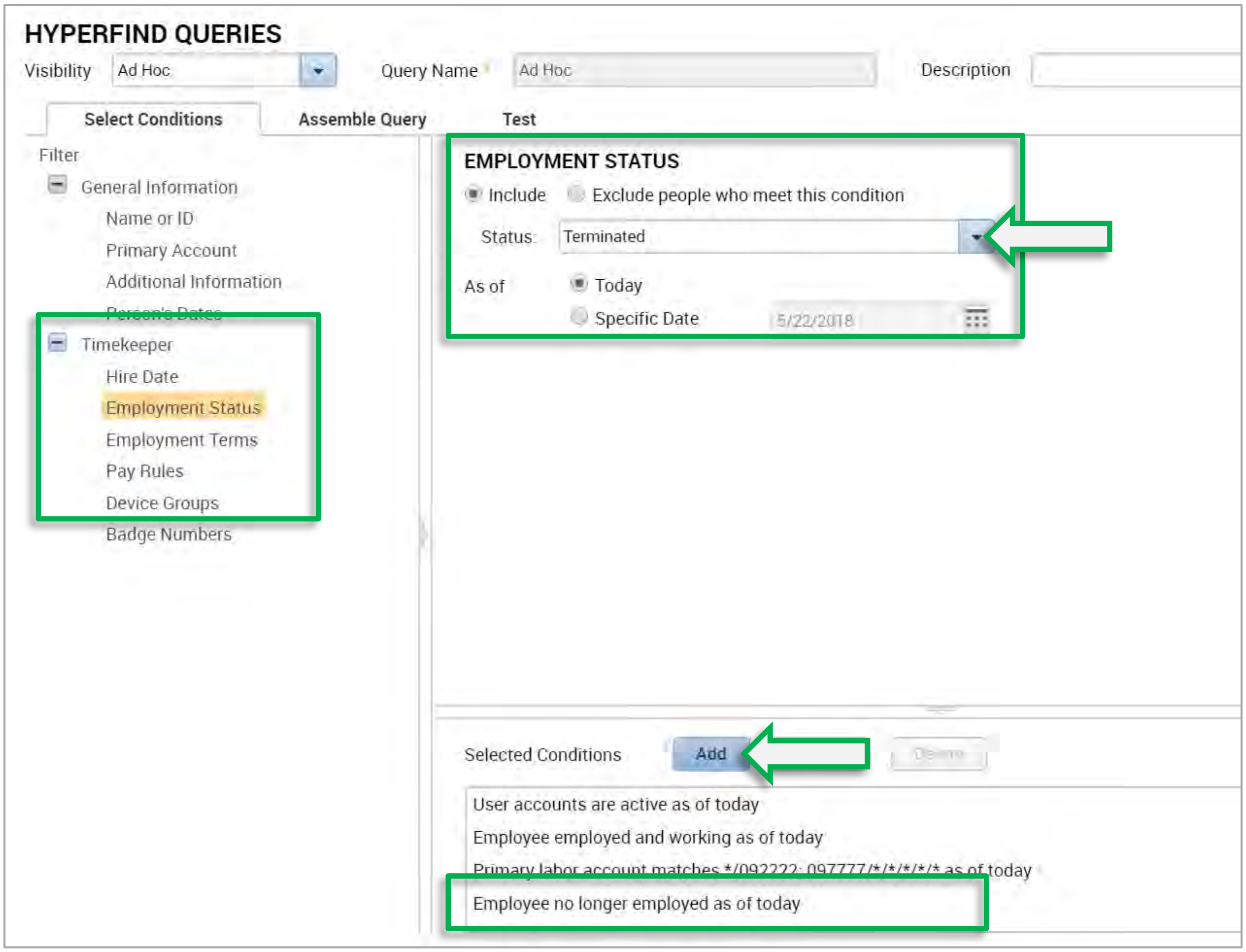
Another useful filter is Employment Status, which allows you to view Terminated employees only.

10. Be sure Ad Hoc is selected in your Hyperfind Selector.
11. Click Edit (you can also get there by clicking Edit Ad Hoc in the Hyperfind Selector).

Unless you have logged out or edited the hyperfind since selecting the department in the previous step, the department(s) you selected should still be listed in the Selected Conditions box.

12. Click the + to open the Timekeeper filter options.
13. Select Employment Status.
14. Select Terminated from the Status drop-down.

15. Click Add.
The new condition will appear in the list of Selected Conditions.



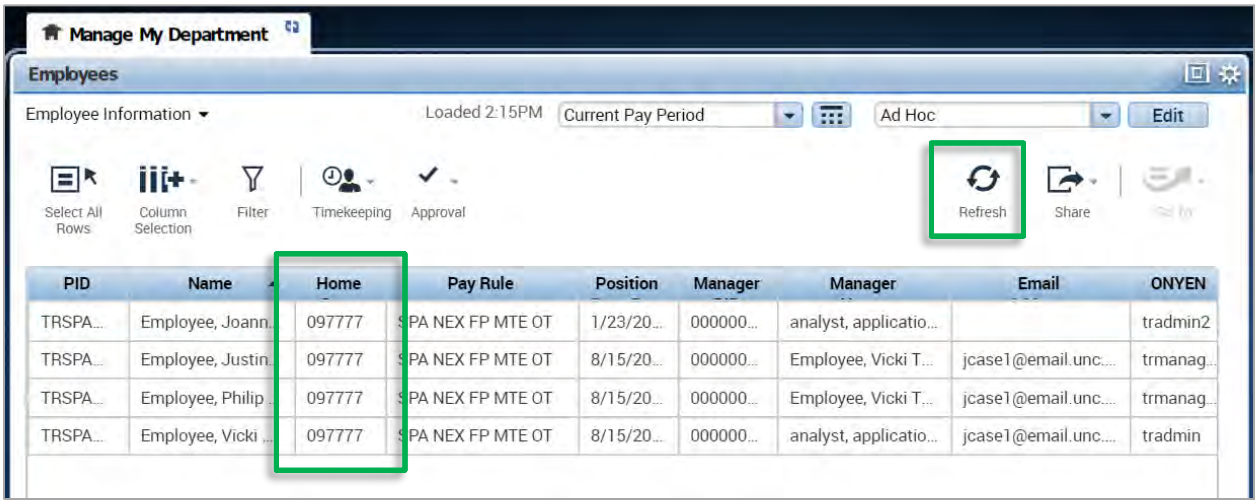
Based on the settings you chose when initially creating this Ad Hoc, you may now have the following conflicting conditions in your list:

- Employee employed and working as of today.
- Employee no longer employed as of today.

You need to remove any conflicting conditions. In this example we want to see only the employees who terminated during the pay period. We need toremove the “Employee employed and working as of today” condition.

16. Select the condition(s) you want to delete.
17. Click Delete.
18. Save the hyperfind.

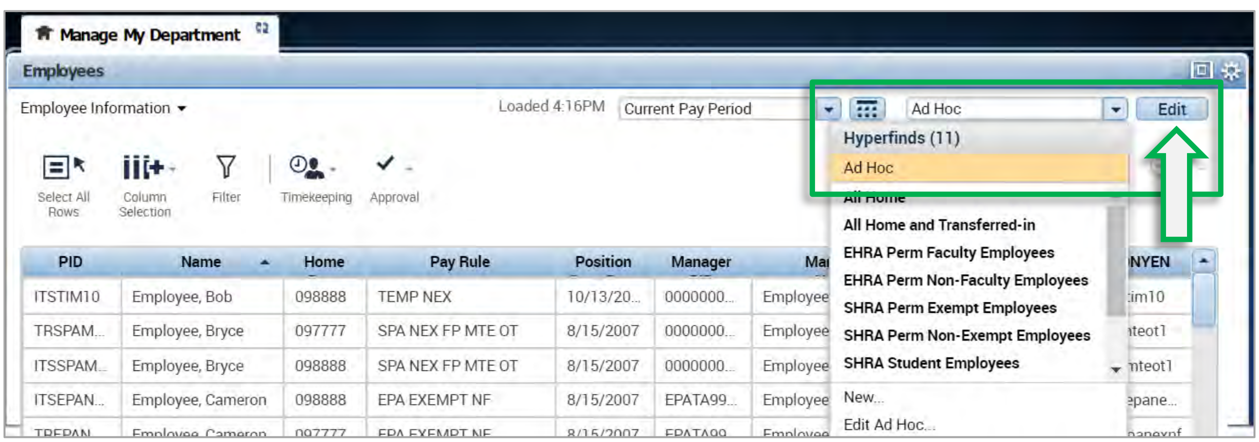
19. After Saving you need to click Refresh. The Ad Hoc hyperfind results will appear in your list.



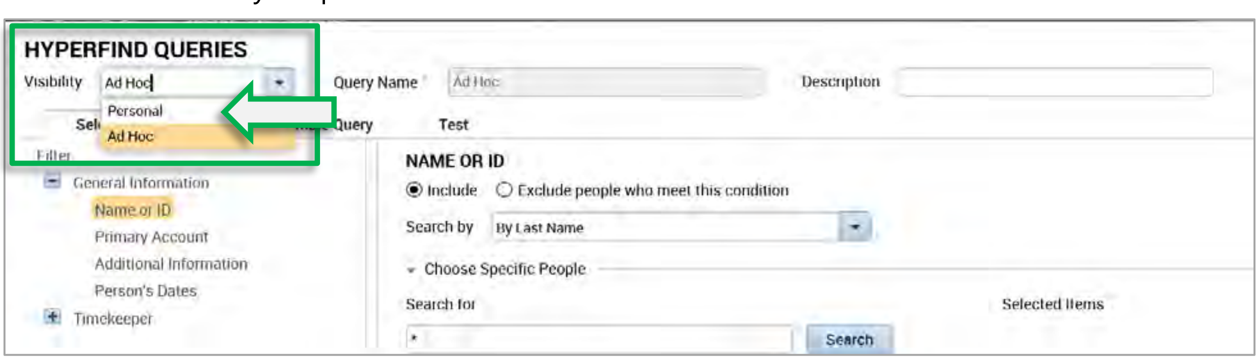
The Ad Hoc hyperfind will maintain these settings until you edit it again or sign out of TIM. Save an Ad Hoc Hyperfind as a Personal Hyperfind

If you need to view a select group of departments frequently you can save the ad hoc hyperfind as a personal hyperfind that will appear in your list of hyperfinds whenever you log in.

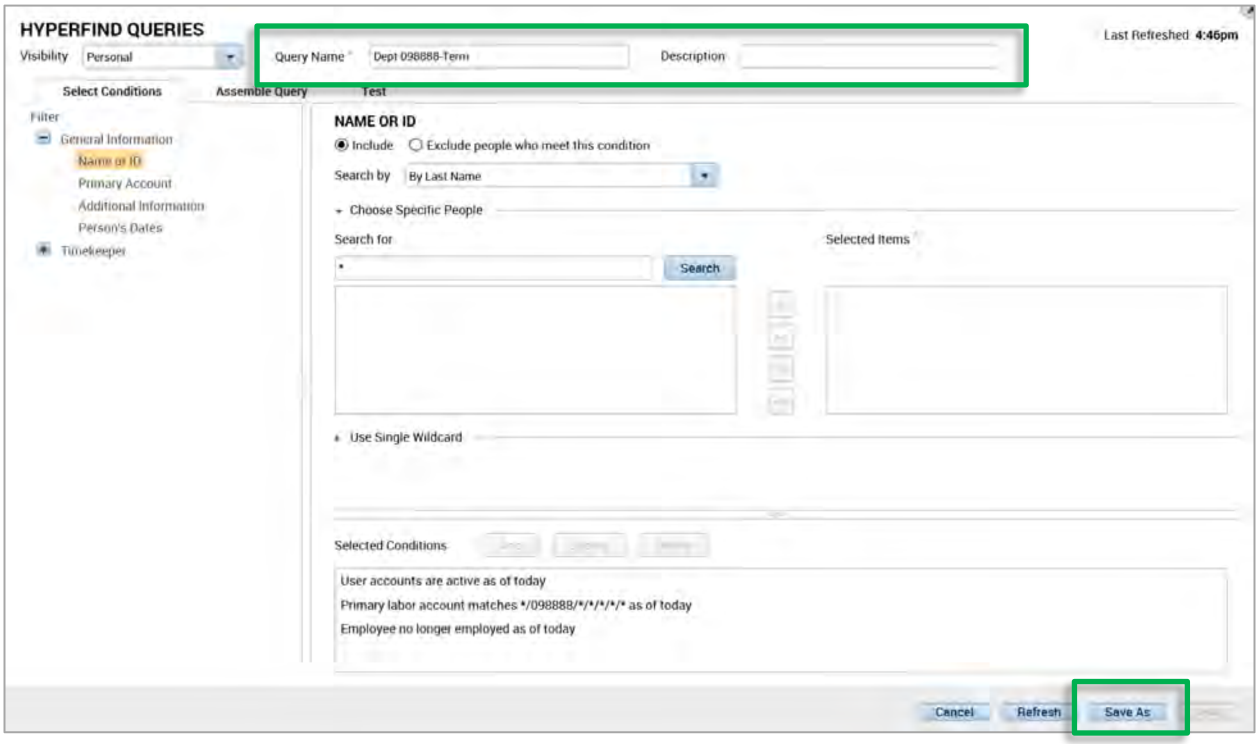
20. Select the Ad Hoc hyperfind from the Hyperfind Selector and click Edit.



21. Click the Visibility drop-down and select Personal



22. Add a Query Name that is short and descriptive. For example, 'Dept ######, Name, Employment Status' like 'Dept 098888, Test Group, Terms'
23. Add a description if you want to clarify the purpose of the query. Note that this will not appear in the list of hyperfinds.
24. Add or remove conditions as needed.
25. Click Save As.



❖ **Note:** the new personal hyperfind will not show up in your Hyperfind Selector until after you sign out and back in to TIM.

View Your Personal Hyperfinds

26. If you haven't already, sign out and back in to TIM.
27. Click the down arrow to open the Hyperfind Selector.
28. The selector will now list any personal hyperfinds you have created.
    - Hyperfinds will appear in alphabetical order.
    - Personal Hyperfinds will always appear in normal (not bold) text.
    - Public Hyperfinds, which you cannot edit, will always appear in bold text.
    - No one but you will be able to see or use the Personal hyperfinds you create.

Manage Your Personal Hyperfinds

TIM does not give TIM Administrators the option to delete personal hyperfinds, so you need to exhibit restraint when creating new ones. Tips for managing your hyperfind list:

- Name your personal hyperfinds carefully to keep the list easy to navigate. For example, 'Dept ######, Name, Employment Status'
- If you only expect to use a specific query occasionally, use the Ad Hoc hyperfind instead of adding a new one to your list.
- You can update and **rename** an existing personal hyperfind rather than creating a new personal hyperfind.

Custom Hyperfind Reminder:

❖ If the edits you made to an Ad Hoc hyperfind are not working, you may need to Refresh your workspace.
❖ If a personal hyperfind you created is not showing up in the list, you may need to sign out and back in

Converting Overtime to Comp Time (TIM Administrators Only)

When permanent non-exempt employees have worked over 40 hours in one week, they either earn overtime or comp time. The default setting of either overtime or comp time is determined by the employee's department. All employees in a department have the same default.

- ❖ Overtime is time worked over forty hours in one week.
- ❖ Weeks run from Monday through Sunday.
- ❖ Holiday and leave time are not included.
- ❖ Overtime is paid to the employee at the time and a half rate.

Departments that default to overtime occasionally need to convert that overtime to comp time. This is done by adding one new line in the affected timecard to show the comp time, and another new line to negate the existing overtime.

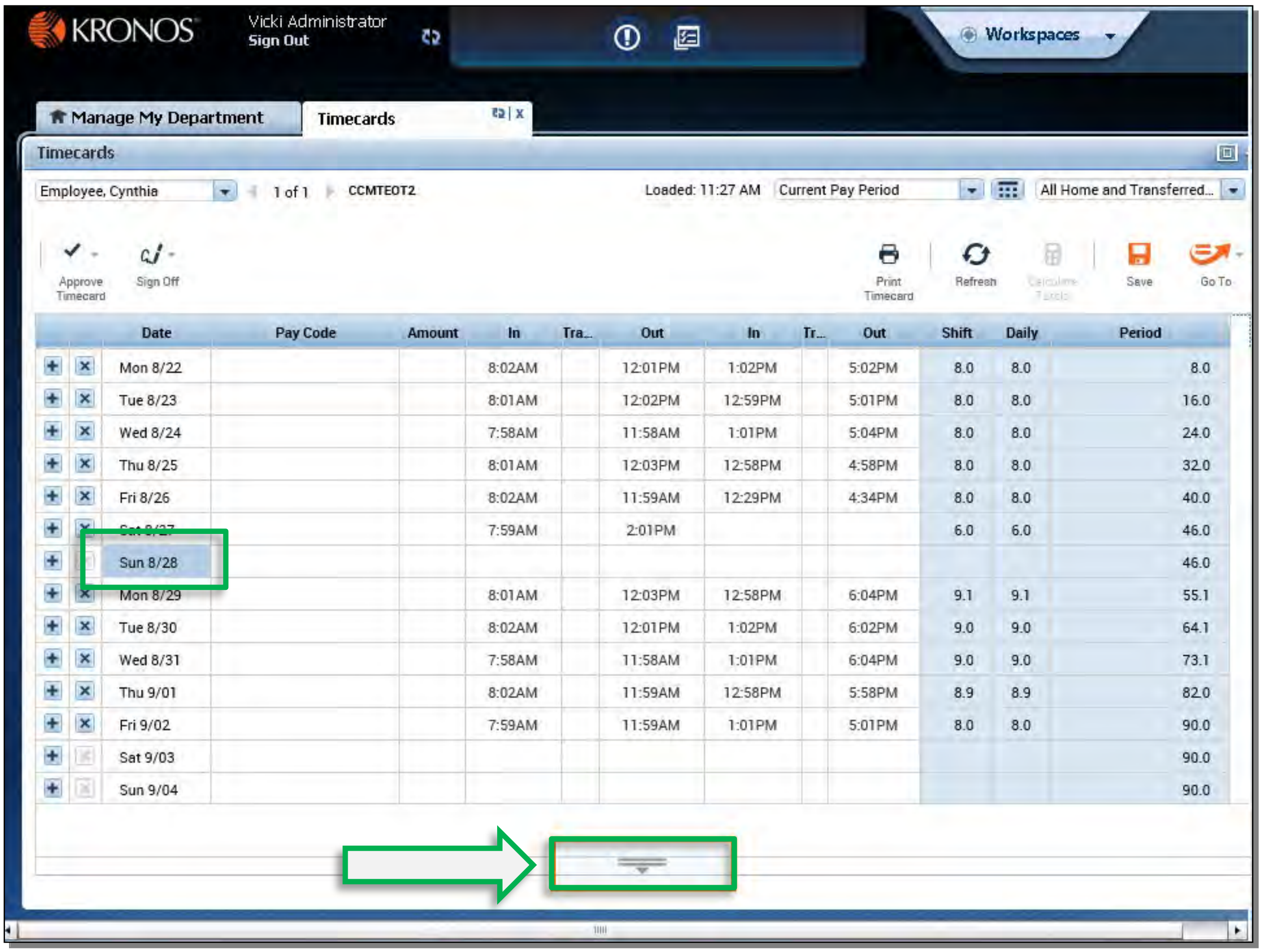
Requirements:

- Department must approve conversion.
- Conversions must be performed at the end of each week that overtime is earned.
- Conversions must be performed in the current open pay period before the TIM Administrator signs off on the timecard.
- The employee's department must follow the employee's pay rule. To verify, check the Timecard Pay Rule column for either an OT or a CT. *Pay rules may still start with SPA or EPA in your list in TIM. These will be updated to SHRA or EHRA in the future.*

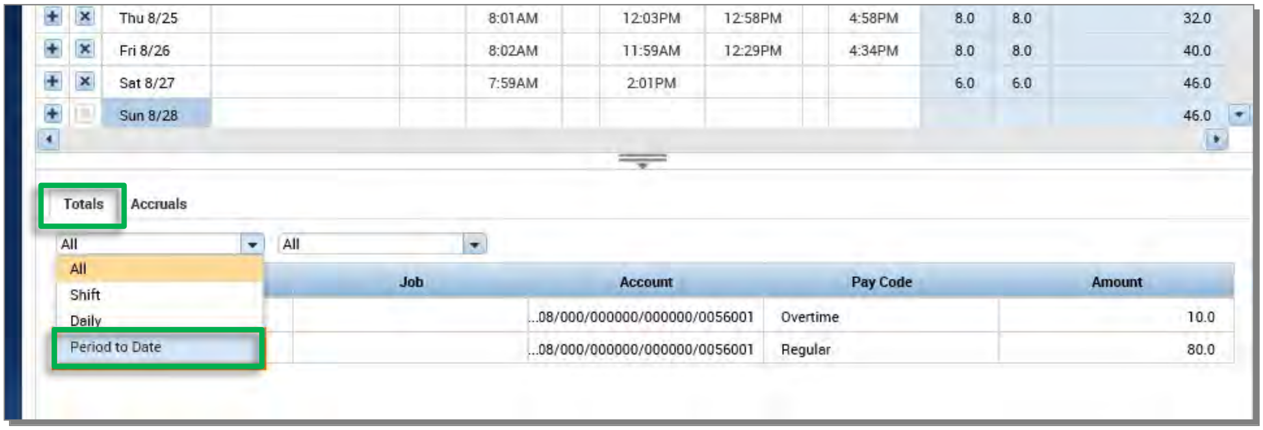
PID	Name	Home Dept	Pay Rule	Manager PID	Manager Name	Email Address	ONYEN
JCADMIN	Administrator, Vicki	008888	SHRA NEX FP MTE OT	100000008	analyst, applicatio...	jcase1@email.unc....	jcadmin1
JCMTEOT	Employee, Bryce	008888	SHRA NEX FP MTE OT	100000008	Administrator, Vicki	jcase1@email.unc....	jcemployee1
JCMTEOT2	Employee, Cynthia	008888	SHRA NEX FP MTE OT	100000008	Administrator, Vicki	jcase1@email.unc....	jcemployee2
JCMTECT	Employee, Jamie	008888	SHRA NEX FP MTE CT	100000008	Administrator, Vicki	jcase1@email.unc....	jcemployee3
JCCAPCT	Employee, Mary	008888	SHRA NEX FP CAP CT	100000008	Administrator, Vicki	jcase1@email.unc....	jcemployee4
JCSPAEX	Employee, Stan	008888	SHRA EXEMPT FP	100000008	Administrator, Vicki	jcase1@email.unc....	jcemployee6
JCEPA	Employee, Yolanda	008888	EHRA EXEMPT NF	100000008	Administrator, Vicki	jcase1@email.unc....	jcemployee8
JCMGR2	Manager, Justine	008888	SHRA NEX FP MTE OT	100000008	Administrator, Vicki	jcase1@email.unc....	jcmanager2
JCMGR	Manager, Philip	008888	SHRA NEX FP MTE OT	100000008	Administrator, Vicki	jcase1@email.unc....	jcmanager1

Steps:

1. Locate the employee's timecard. (See "Manage My Department Tab" on page 39.)
2. Confirm that the employee has earned overtime in the time period.
3. Click the cell for the Sunday in the week that needs to be modified.
4. Click the Show Timecard Tabs icon to display the totals for the week selected.



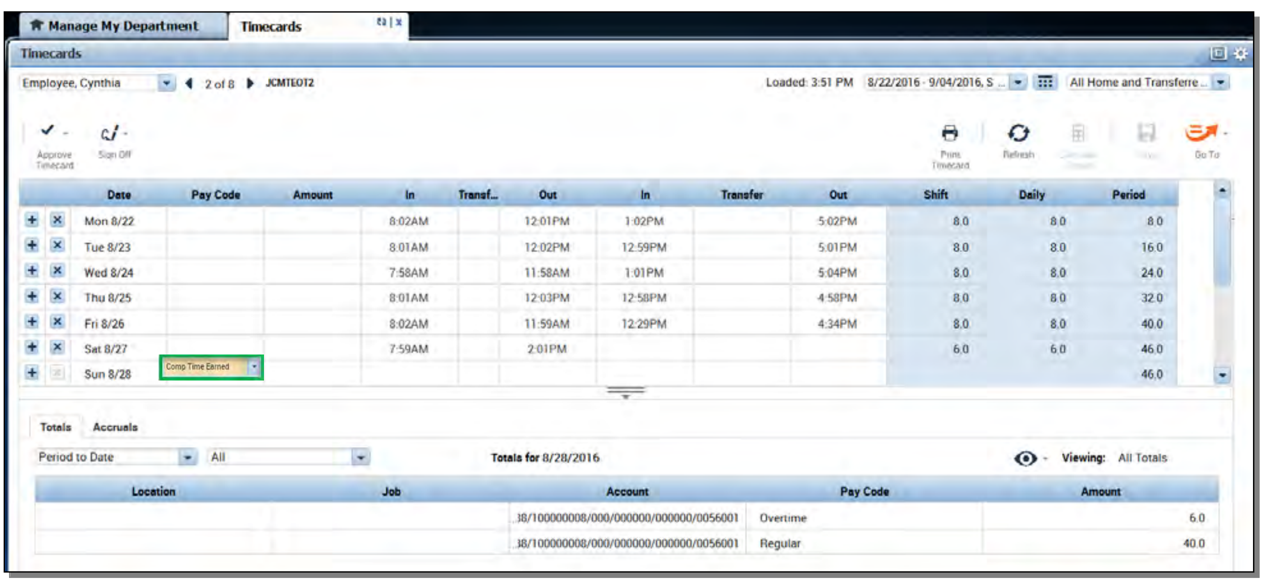
5. To show the overtime vs. regular time breakdown for the specific week, go to the Totals tab and select Period to Date.



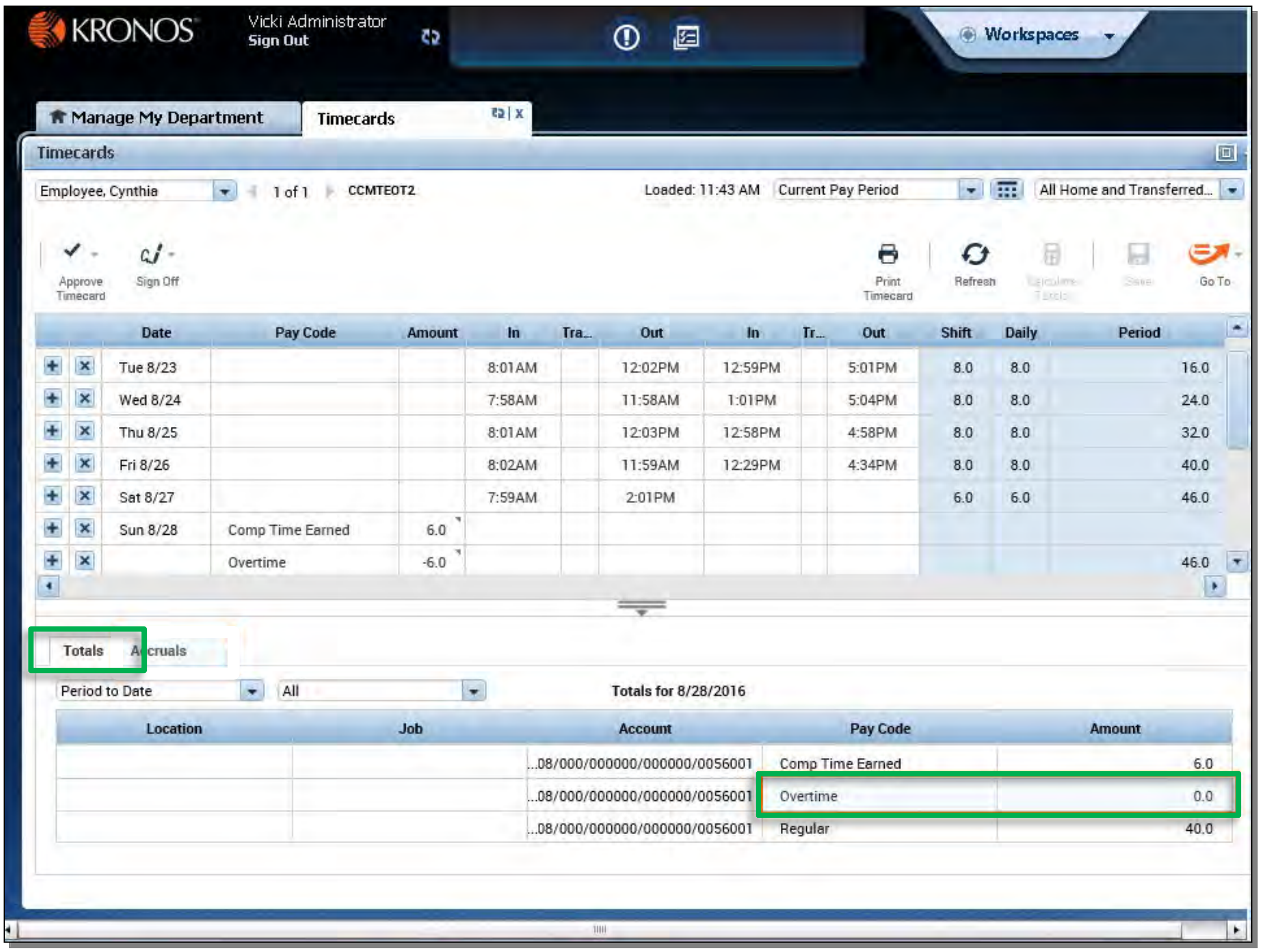
NOTE: If the week being modified is the first week of the pay period, the amount listed under Period to Date is the amount available for conversion for the selected week.

If the week being modified is the second week of the pay period, the amount available for the week can be calculated by subtracting the first week total from the total amount for the pay period.

6. In the row for the appropriate Sunday, click the cell in the Pay Code column and select Comp Time Earned from the dropdown.



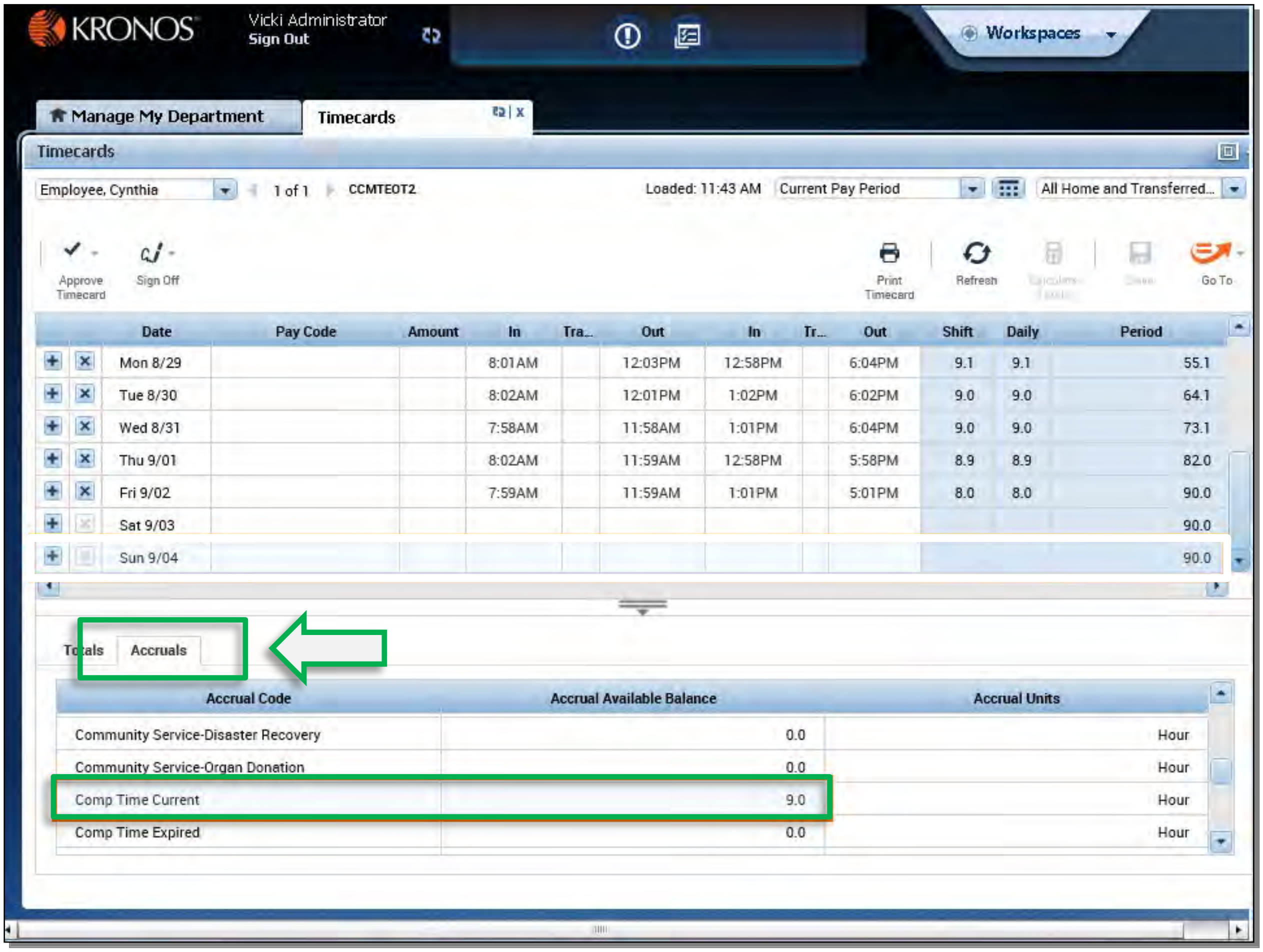
7. Click the cell in the Amount column on the same row and type in the number of hours to be converted, then click Save.
8. Click the plus sign the left side of the row to add another row to Sunday.
9. In the new row, select Overtime from the Pay Code dropdown.
10. In order to subtract the overtime amount, type in the number of hours as a negative number (e.g., for 6 hours comp time added, type in -6 hours of overtime), then save again.
11. The Totals tab will now show Comp Time Earned as the amount entered, and the Overtime will have changed to show the original amount minus the amount converted to Comp Time.



12. With the appropriate date selected, click the Accruals tab and scroll down to show the Comp Time Current row.

    The system automatically calculates the time and a half rate, so the Accrual Available Balance will show 1.5 times the number of hours entered.

    If you are viewing the second week of a Pay Period, remember that the amounts listed will include the totals from the first week.



Converting Comp Time to Overtime (TIM Administrators Only

When permanent non-exempt employees have worked over 40 hours in one week, they either earn overtime or comp time. The default setting of either overtime or comp time is determined by the employee's department. All employees in a department have the same default.

- ❖ Comp time is time worked over forty hours in one week.
- ❖ Weeks run from Monday through Sunday.
- ❖ Holiday and leave time are not included.
- ❖ Comp time accrues at the time and a half rate. For example, an employee who works 45 hours in a week has 5 hours of comp time. Multiplied by one and a half, this means the employee accrues 7.5 hours of comp time.

Departments that default to comp time occasionally need to convert that comp time to overtime. This is done by adding one new line in the affected timecard to show the overtime, and another new line to negate the existing comp time.

Requirements:

- Department must approve conversion.
- Conversions must be performed at the end of each week that comp time is earned.
- Conversions must be performed in the current open pay period before the TIM Administrator signs off on the timecard.
- The employee's department must follow the employee's pay rule. To verify, check the Timecard Pay Rule column for either an OT or a CT.

  Pay rules may still start with SPA or EPA in your list in TIM. These will be updated to SHRA or EHRA in the future.

PID	Name	Home Dept	Pay Rule	Manager PID	Manager Name	Email Address	ONYEN
JCADMIN	Administrator, Vicki	008888	SHRA NEX FP MTE OT	100000008	analyst, applicatio...	jcase1@email.unc....	jcadmin1
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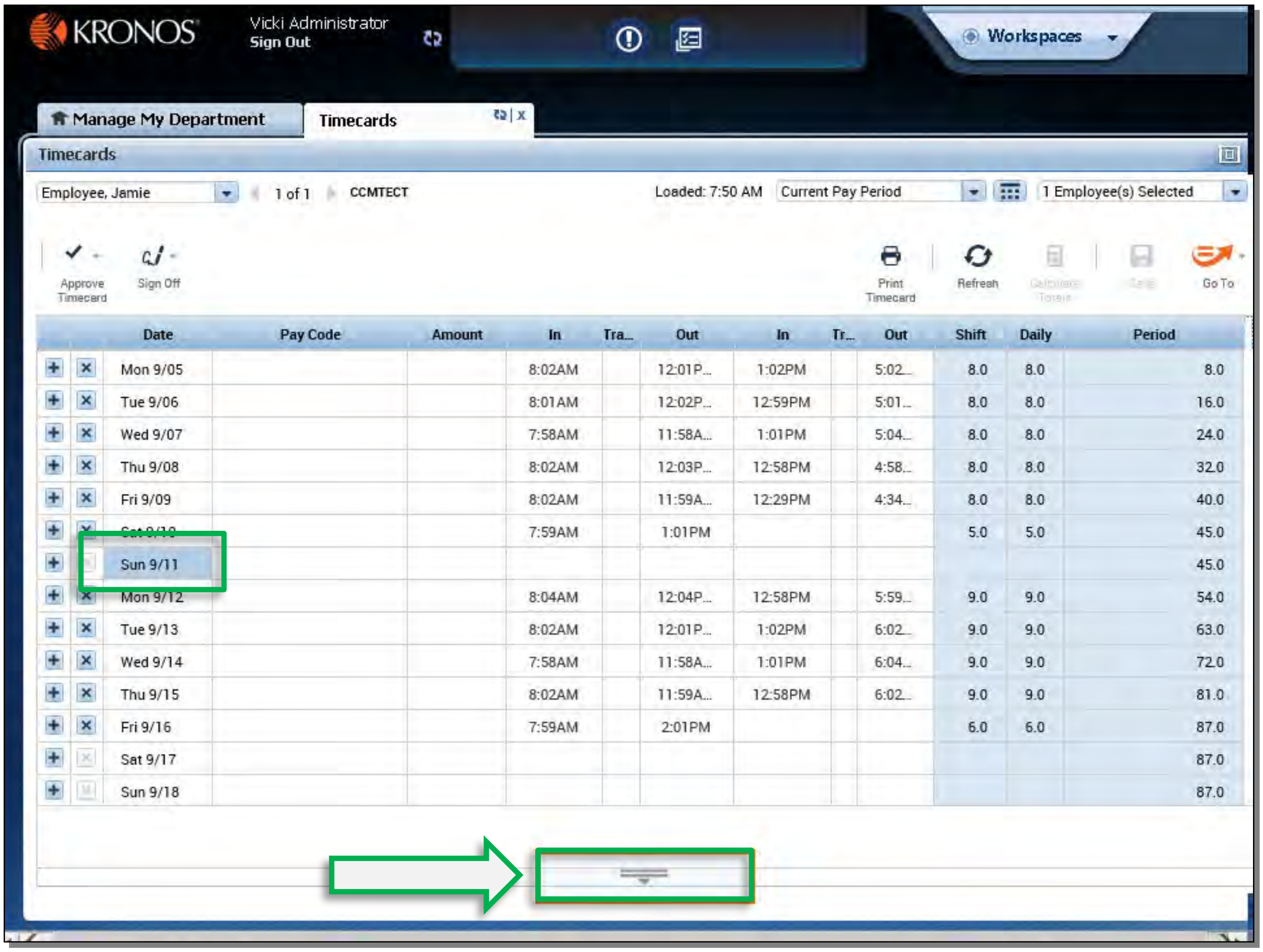
JCMTEOT2	Employee, Cynthia	008888	SHRA NEX FP MTE OT	100000008	Administrator, Vicki	jcase1@email.unc....	jcemployee2
JCMTECT	Employee, Jamie	008888	SHRA NEX FP MTE CT	100000008	Administrator, Vicki	jcase1@email.unc....	jcemployee3
JCCAPCT	Employee, Mary	008888	SHRA NEX FP CAP CT	100000008	Administrator, Vicki	jcase1@email.unc....	jcemployee4
JCSPAEX	Employee, Stan	008888	SHRA EXEMPT FP	100000008	Administrator, Vicki	jcase1@email.unc....	jcemployee6
JCEPA	Employee, Yolanda	008888	EHRA EXEMPT NF	100000008	Administrator, Vicki	jcase1@email.unc....	jcemployee8
JCMGR2	Manager, Justine	008888	SHRA NEX FP MTE OT	100000008	Administrator, Vicki	jcase1@email.unc....	jcmanager2
JCMGR	Manager, Philip	008888	SHRA NEX FP MTE OT	100000008	Administrator, Vicki	jcase1@email.unc....	jcmanager1

Steps:

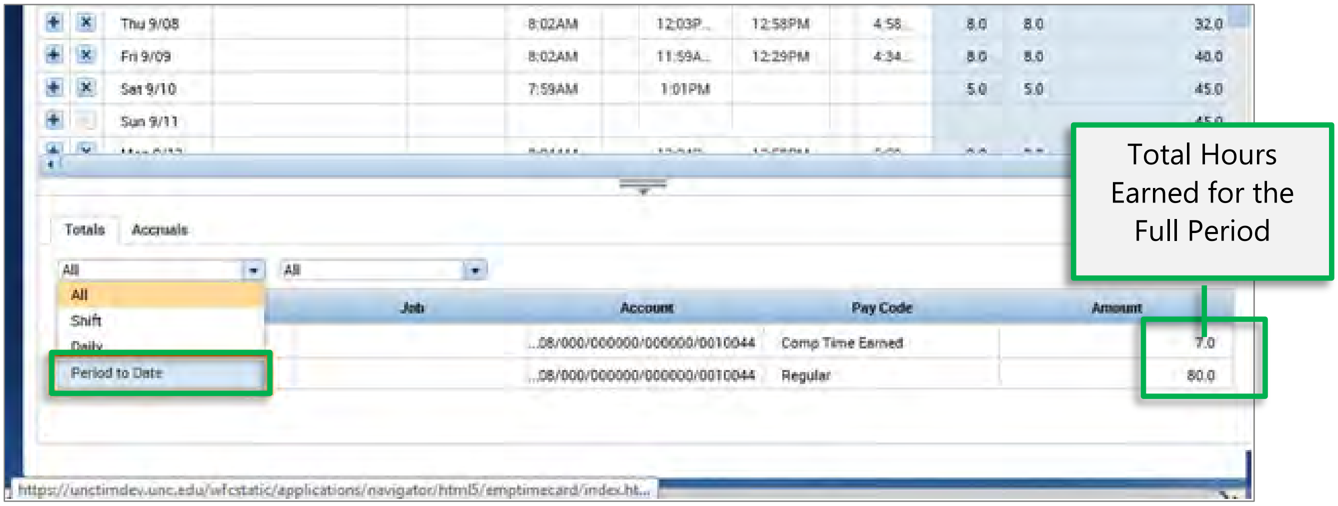
Locate the comp time that needs to be adjusted.

1. Locate the employee’s timecard. (See “Manage My Department Tab” on page 39.)
2. Confirm that the employee has earned comp time in the time period.
3. Click the cell for the Sunday in the week that needs to be modified.
4. Click the Show Timecard Tabs icon to display the totals for the week selected.

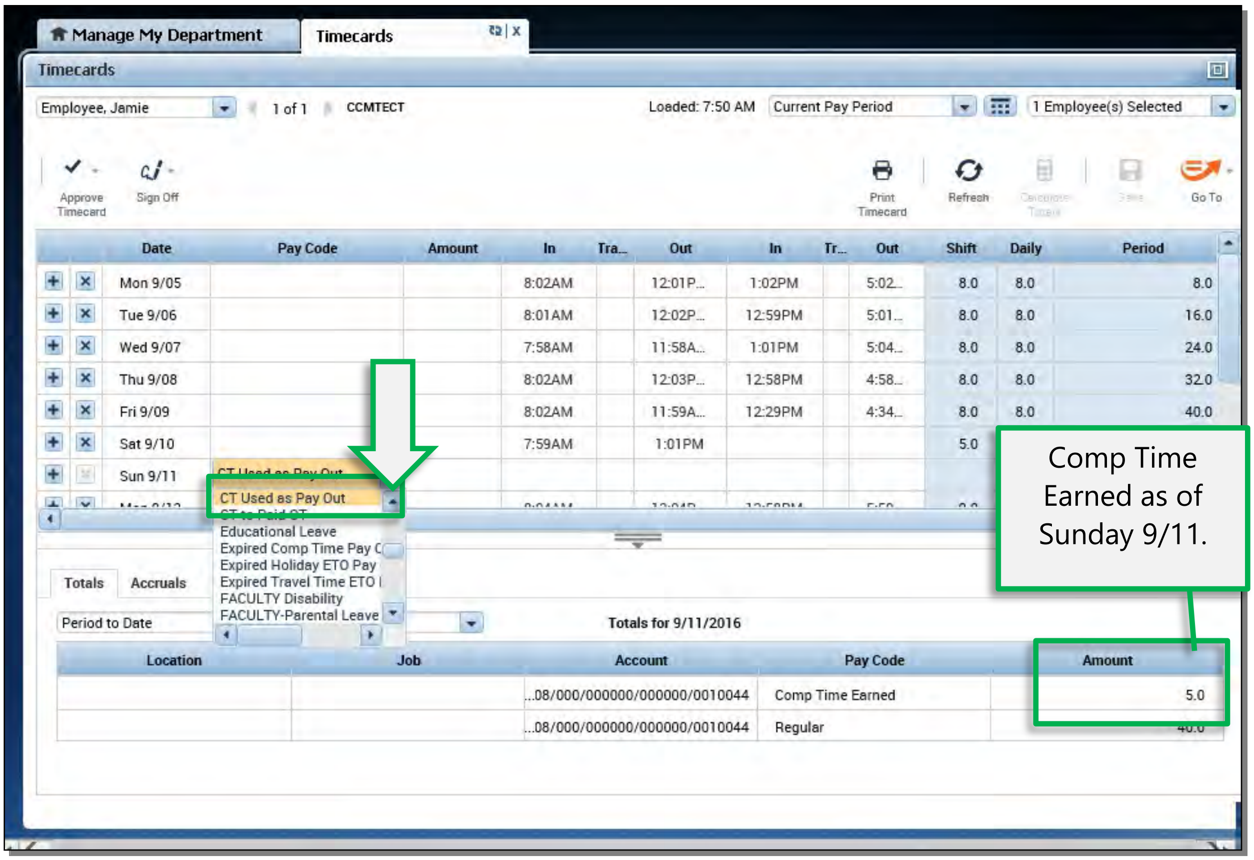


Add the Overtime and Remove the Accrued Comp Time

1. To view the comp time vs. regular time breakdown for the specific week, go to the Totals tab and select Period to Date.



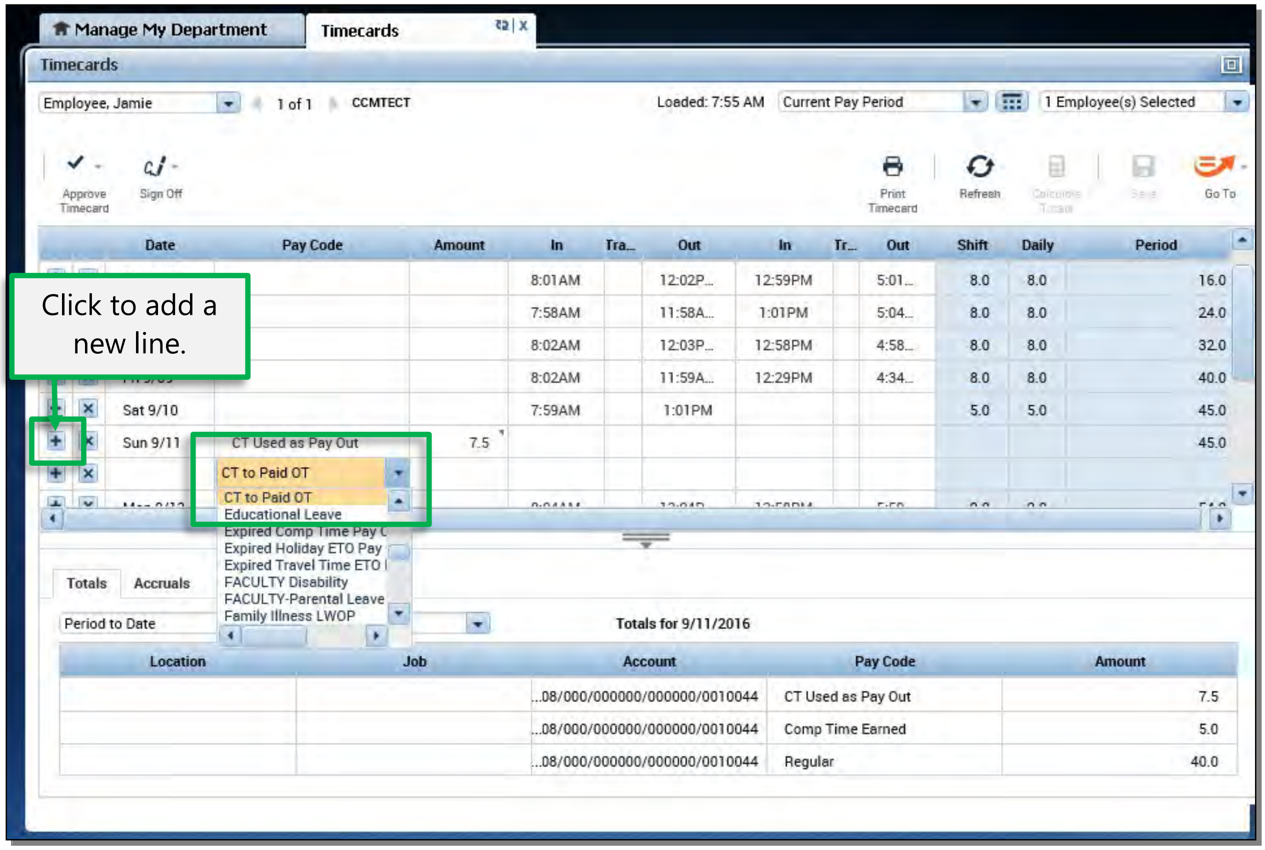
2. Click the Sunday date in the Date column for the week that is being modified and view the totals tab to verify the amount of comp time earned.
    - If the week being modified is the first week of the pay period, the amount listed under Period to Date is the amount available for conversion in the selected week.
    - If the week being modified is the second week of the pay period, the amount available for the week can be calculated by subtracting the first week total from the total amount for the pay period.
3. Click the cell in the Pay Code column and select CT Used as Pay Out from the dropdown.



About the CT Used as Pay Out code

- This code removes comp time that has accrued.
- When entering CT Used as Pay Out amounts, you always enter the Comp Time **accrued** (1.5 times the amount earned), not the Comp Time earned.
- Unlike the process described on page 135 in which overtime is converted to comp time by entering a negative amount, CT Used as Pay Out should be entered as a positive amount.

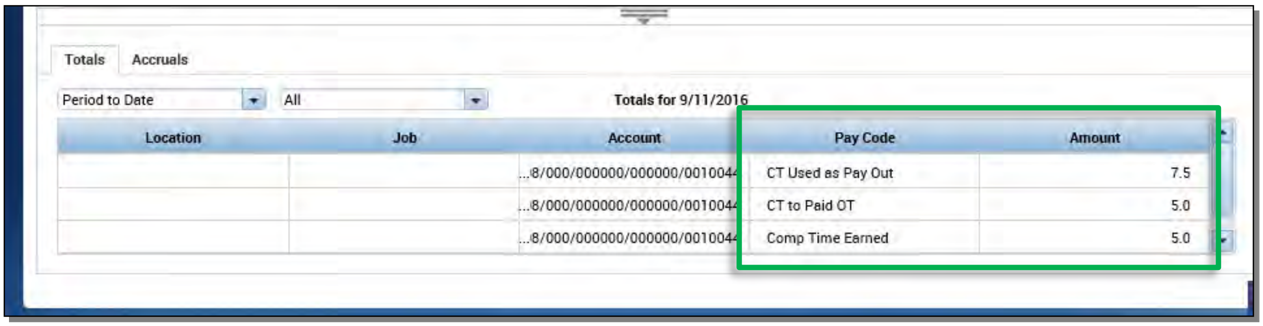
4. Click the cell in the Amount column and enter the number of comp time hours accrued, making sure to multiply the number of comp time hours earned by 1.5.
5. Click Save.
6. Click the plus sign to the left of the date to add a line for Sunday.
7. Select CT to Paid OT from the Pay Code dropdown. This indicates the number of comp time hours that are to be converted to overtime hours.



8. Enter the amount of Comp Time Earned in the Amount column.
9. Click Save.

Check the Totals

1. Make sure you have the correct date selected.
2. Review the amounts listed on the Totals tab.
   - CT to Paid OT should reflect the number of hours converted to overtime, which must be less than or equal to the amount of Comp Time Earned.
   - The CT Used as Pay Out should be equal to 1.5 times the CT to Paid OT amount.
   - If you are viewing the second week of a Pay Period, remember that the amounts listed will include the totals from the first week.



Entering Shared Leave

Voluntary shared leave allows one employee to help another employee in the case of a prolonged medical condition that uses up the employee's available leave. Without the offer of shared leave to an employee with a long-term illness, that person would be placed in leave without pay status, resulting in a loss of income and benefits.

Once HR has approved for one employee to offer sick, bonus or vacation time to another, the following actions are taken in TIM:

1. On the day the hours are donated:
   - Record the amount of voluntary shared leave hours donated in the donor's timecard.

After HR has approved the shared leave hours to be received by the employee:

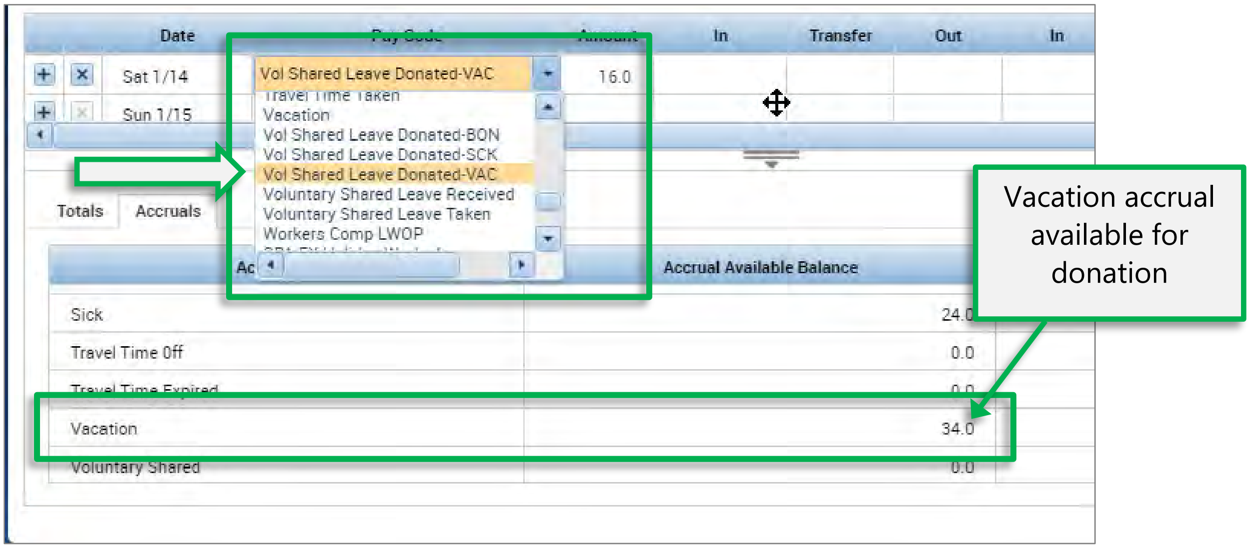
1. On the date provided by HR that the employee receives the shared leave hours:
   - Record the amount of voluntary shared leave hours received in the recipient's timecard.
2. On the day the recipient uses the hours:
   - Record the amount of voluntary shared leave hours taken in the recipient's timecard.

Donating Shared Leave Hours (TIM Administrators Only)

1. Open the Time Card for the employee who is donating hours.
2. Check the Accruals Tab to be certain the employee has enough vacation, bonus or sick hours available to donate.
3. Click the cell in the Pay Code column that corresponds with the date of donation.
4. Scroll down and choose Vol Shared Leave Donated-VAC.

❖ Note the other two choices available: BON for bonus and SCK for sick.

5. Enter the number of hours to be donated in the Amount field.
6. Click Save.

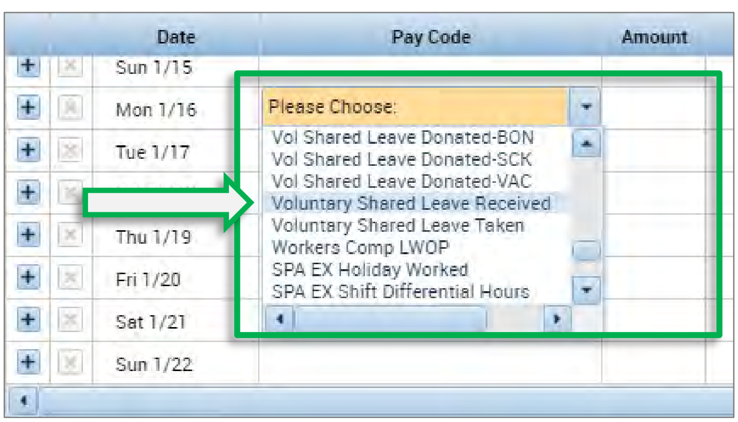


7. Review the balance in the Accruals tab, that the person is donating from, i.e. Vacation, Sick or Bonus.

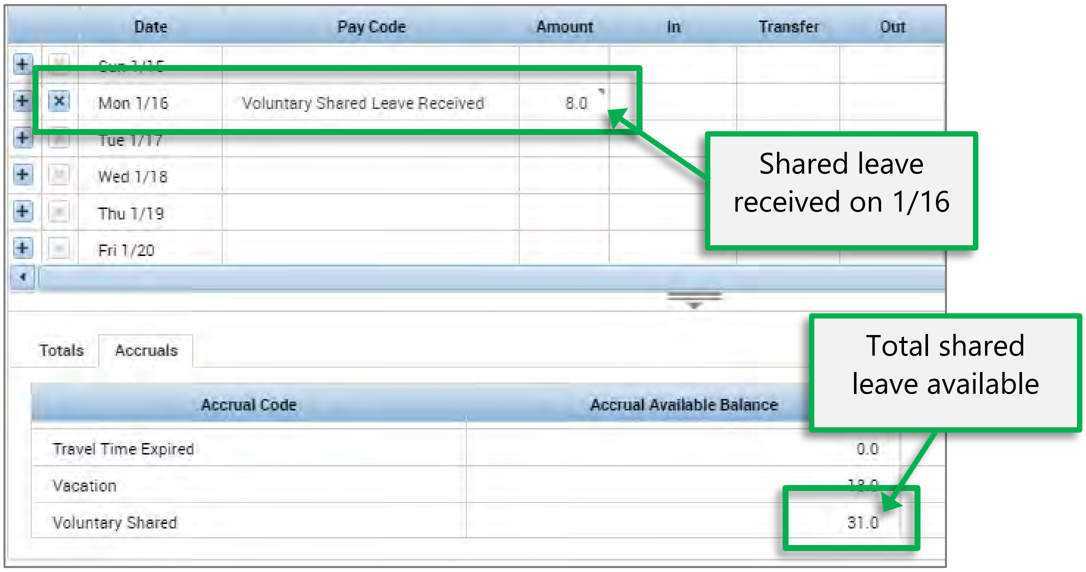
Adding the Hours Donated (TIM Administrators Only)

If the employee who is receiving the time is in your department and HR has approved the employee to receive the shared leave hours, follow these next steps.

1. Open the timecard for the employee who is receiving the hours.
2. Click the Pay Code cell for the date on which the leave time was donated.
3. Scroll down and choose Voluntary Shared Leave Received.



4. Enter the number of hours that were donated in the Amount field.
5. Click Save.
6. Review the Voluntary Shared bank in the Accruals tab.



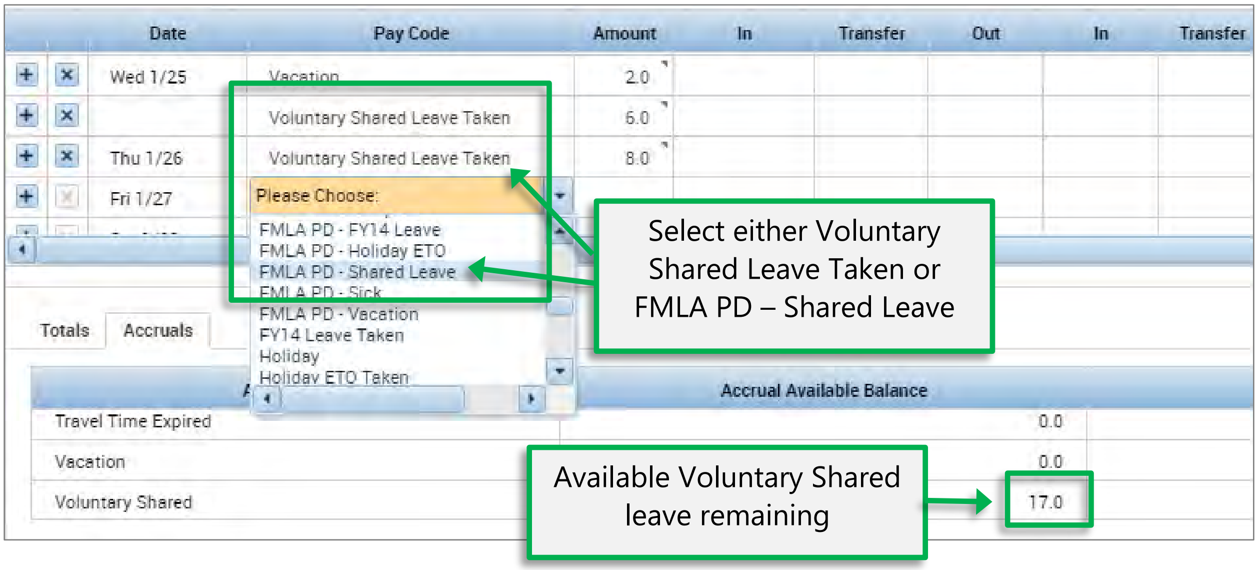
Recording the Number of Voluntary Shared Hours Taken (Managers and TIM Administrators)

The TIM Administrator or Manager of the employee who is on leave must edit the employee's timecard to record any Voluntary Share Hours used.

1. Open the employee's timecard in the usual manner.
2. Click the down arrow in the **pay code column** of the date the leave was taken.
3. Select Voluntary Shared Leave Taken.

> ❖ Use the Pay Code "FMLA PD – Shared Leave" when the employee is using Family and Medical Leave Act benefits.

4. Enter the hours taken in the corresponding Amount field.
5. Click Save.
6. Check the Accruals tab.



Adverse Weather (TIM Administrators only)

When adverse weather conditions affect University operations, pay considerations are determined by the condition level. The University will announce the upcoming condition level as soon as possible when adverse weather may potentially interfere with the ability of employees to safely travel to work. Any Adverse Weather pay codes used for Conditions II and III must be entered by managers or TIM Administrators.

- ❖ Refer to the SHRA Leave and Holidays page on the Human Resources website (http://hr.unc.edu/policies-procedures-systems/spa-employee-policies/leave-and-holidays/) for in-depth details about the Adverse Weather and Emergency Event policy.
- ❖ Contact the HR department directly with any policy-related questions.

Condition I

Operations are reduced. The University is open, but non-essential employees should use their discretion on whether they can safely travel to work.

Accounting for Scheduled Hours During Condition I

- If hours were worked during Condition I, record those hours worked in TIM as usual.
- If hours were missed during Condition 1, employees have the following options:
    - Use available leave hours for the hours missed. Record the leave hours in TIM as usual.
    - If approved by the supervisor, the employee may work additional hours during that week to make up for the hours missed.
    - Receive a Dock in Pay.
        i. SHRA Non-Exempt employees should leave the time missed blank. They will not be paid for those hours.
        ii. SHRA Exempt employees need to process a Dock in Pay action in ConnectCarolina via the Lump Sum ePAR. Please contact ConnectCarolina for assistance.
- Adverse Weather pay codes **CANNOT** be used for Condition 1 time missed.

Condition II

Operations are suspended. Non-mandatory employees must not report to work during Condition II, but they are required to account for their regularly scheduled hours.

Accounting for Scheduled Hours During Condition II

Use Available Leave

- The employee may use available earned time off or leave hours for the hours missed. Note that any available comp time must be used before the employee becomes eligible for the Adverse Weather Condition II Owed time explained below.
- Employees who are already out on approved leave will record the approved leave hours taken in TIM as usual.

Work from Home

If approved by the supervisor, the employee may work from home and record his or her time in TIM.

Receive a Dock in Pay

The employee may take a Dock in Pay for hours missed, and will not be paid for those hours.

- SHRA Non-Exempt employees should leave the time missed blank.
- SHRA Exempt employees need to process a Dock in Pay action in ConnectCarolina via the Lump Sum ePAR. Contact ConnectCarolina for assistance.

Make Up the Time During the Current Week

If approved by the supervisor, the employee may work additional hours during the current week to make up for the hours missed. The employee records their hours worked as usual.

Use Adverse Weather Condition II Owed Time

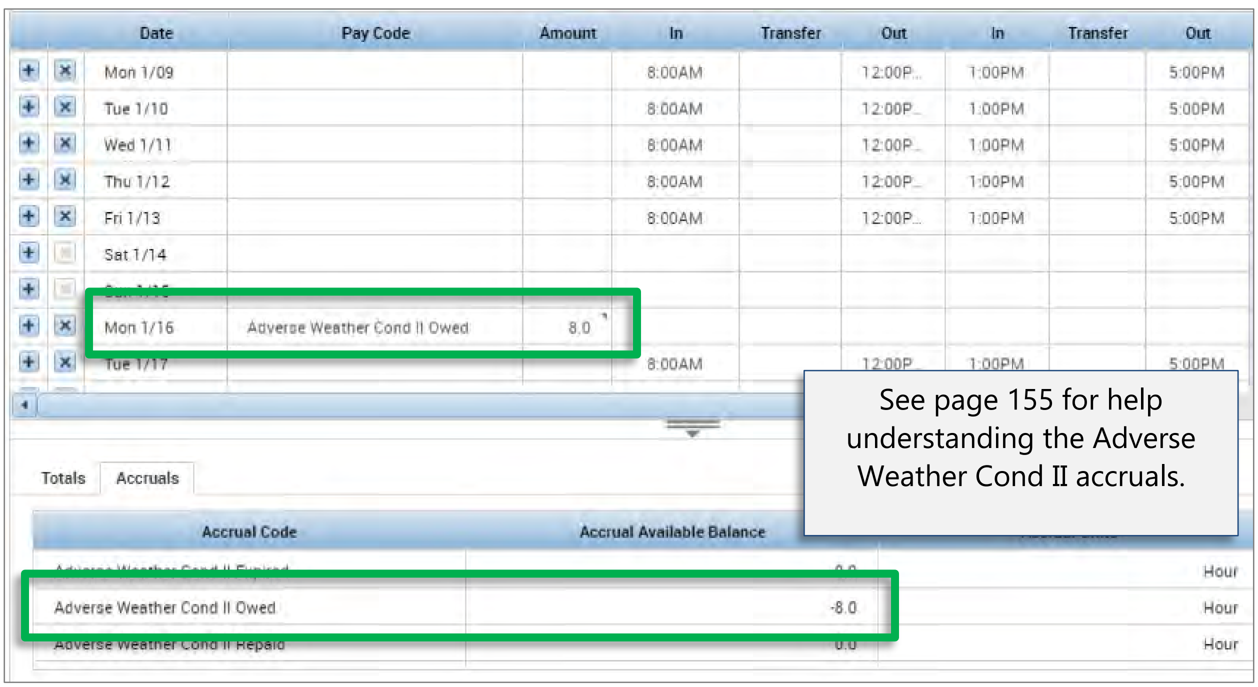
- If employees either do not have any available leave time or do not want to use the leave they have, they can use Adverse Weather Condition II Owed time if approved by their supervisor.
- Adverse Weather Condition II Owed time must be repaid within 90 days either by working extra hours in a week with a Holiday or leave hours taken or by applying accrued leave time.

Adverse Weather Condition II Owed Instructions

Adverse Weather Condition II Owed pay codes must be entered by the manager or TIM Administrator.

Recording Adverse Weather Cond II Owed in TIM

1. Open the employee’s timecard.
2. Click the Pay Code cell that corresponds with the date time was missed due to Condition II adverse weather. Widen the column if needed.
3. Scroll down and choose **Adverse Weather Cond II Owed**.
4. In the Amount column, type the number of Adverse Weather Cond II Owed hours taken due to adverse weather as a positive number. If the employee worked some hours that day, enter only the amount of Owed hours that will bring the total to the employee’s regular schedule.
5. Click Save.
6. View the Adverse Weather Cond II Owed timecard and accrual results:
    - The timecard shows as **+8** hours because the employee will be paid for that time.
    - The Adverse Weather Cond II Owed accrual balance shows as **-8** because the employee will need to repay.



See page 155 for help understanding the Adverse Weather Cond II accruals.

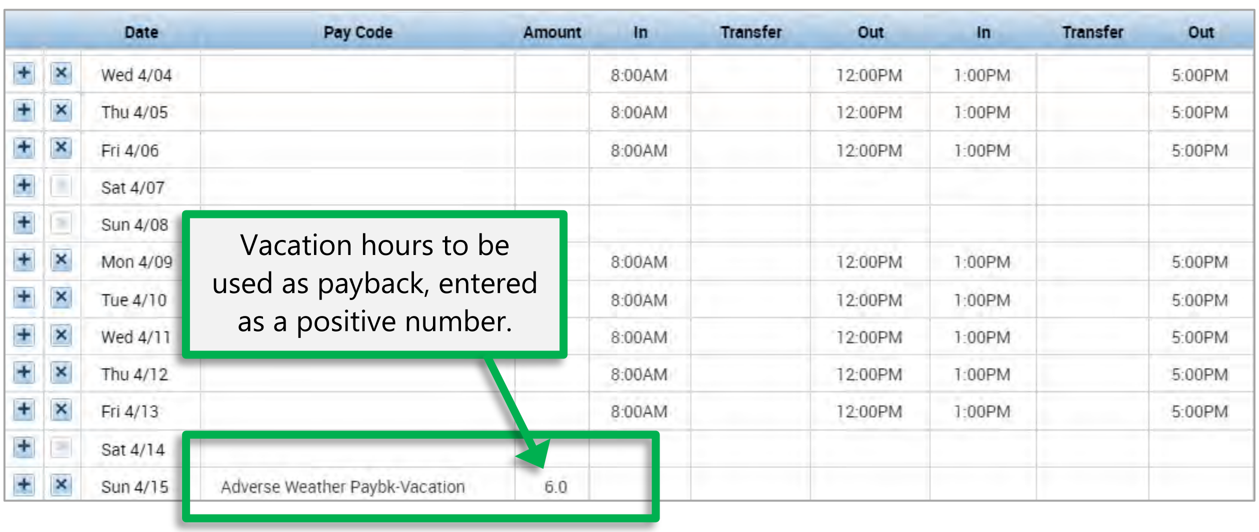
❖ Within 90 days of using Adverse Weather Condition II Owed hours, employees must repay the hours either by coding regular hours worked as leave payback or by working extra hours in a week.

Paying Back Adverse Weather Condition II Owed—Using Leave Hours (TIM Administrators)

The following types of accrued leave can be used to pay back Adverse Weather Condition II Owed hours:

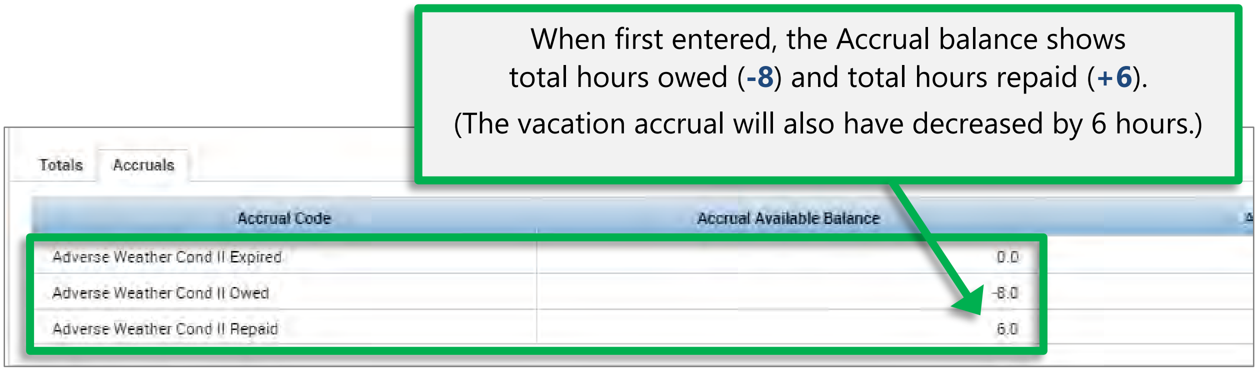
- Adverse Weather Paybk-AW ETO, Adverse Weather earned time off
- Adverse Weather Paybk-Award PTO, Awarded paid time off
- Adverse Weather Paybk-Bonus, Bonus leave hours
- Adverse Weather Paybk-Comp Time, Compensatory time
- Adverse Weather Paybk-HOL ETO, Holiday worked earned time off
- Adverse Weather Paybk-OCTO, On Call time off
- Adverse Weather Paybk-Travel ETO, Travel time earned time off
- Adverse Weather Paybk-Vacation, Vacation leave hours

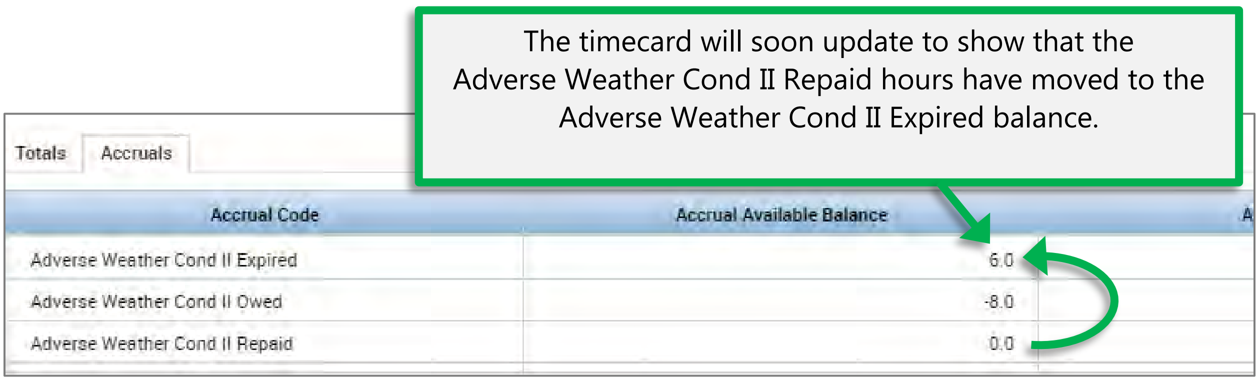
1. On the employee's time sheet go to the Pay Code cell for the day on which hours worked will be used as payback.
2. Select the appropriate "Adverse Weather Paybk-'accrual type'" pay code, such as Vacation, from the drop down list.
3. Enter the Amount of hours to pay back as a positive number on the last day of the pay period.
4. Click Save.



Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out
Wed 4/04			8:00AM		12:00PM	1:00PM		5:00PM
Thu 4/05			8:00AM		12:00PM	1:00PM		5:00PM
Fri 4/06			8:00AM		12:00PM	1:00PM		5:00PM
Sat 4/07								
Sun 4/08								
Mon 4/09			8:00AM		12:00PM	1:00PM		5:00PM
Tue 4/10			8:00AM		12:00PM	1:00PM		5:00PM
Wed 4/11			8:00AM		12:00PM	1:00PM		5:00PM
Thu 4/12			8:00AM		12:00PM	1:00PM		5:00PM
Fri 4/13			8:00AM		12:00PM	1:00PM		5:00PM
Sat 4/14								
Sun 4/15	Adverse Weather Paybk-Vacation	6.0						

5. Review the Accruals tab.





- The employee owes 8 hours and has now repaid 6. The new expired balance is 6.
- The employee must pay back 2 more hours so that the Expired balance will cancel out the Owed balance (+8 Expired + -8 Owed=0) after 90 days.
- This must be done within 90 days of the severe weather event.
- **Note**: The Owed hours will **not** move into the Expired balance until after 90 days. There needs to be the same amount of positive hours in Expired as the negative hours in Owed before 90 days have passed. After 90 days the negative Owed hours will move into the Expired balance, which will then have 0 hours.

About the employee's paycheck:

The employee will not be paid for the extra hours worked because they were already paid for those hours following the severe weather event. The relevant leave accrual balance will be reduced by the number of hours recorded in the timecard.

Paying Back Adverse Weather Condition II Owed—Working Extra Hours

With the supervisor's approval, an employee may work extra hours within 90 days of the severe weather event to pay back Adverse Weather Cond II Owed hours. When working additional hours to pay back Adverse Weather, the employee must do it in a week when leave hours were taken or in a week with a Holiday. Additional hours worked to payback Adverse Weather must **not** be recorded in a week in which the employee earned Overtime or Comp Time.

1. Check the employee's timecard for the week in which extra hours were worked. You will subtract the extra time from the logged hours and add them to a new row indicating that the hours are to be used for payback.

Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift
Mon 4/02	Vacation	4.0							
			8:00AM		12:00PM				4.0
Tue 4/03			8:00AM		12:00PM	1:00PM		5:00PM	8.0
Wed 4/04			8:00AM		12:00PM	1:00PM		5:00PM	8.0
Thu 4/05			8:00AM		12:00PM	1:00PM		5:00PM	8.0
Fri 4/06			6:00AM		12:00PM	1:00PM		5:00PM	10.0
Sat 4/07									
Sun 4/08									

2. On an empty row select the pay code Adverse Weather Cond II Paybk.
3. Enter the Amount of extra hours worked.
4. Adjust the logged hours to reflect the reclassification of hours from Overtime to Adverse Weather Cond II Paybk.

Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift
Mon 4/02	Vacation	4.0							
			8:00AM		12:00PM				4.0
Tue 4/03			8:00AM		12:00PM	1:00PM		5:00PM	8.0
Wed 4/04			8:00AM		12:00PM	1:00PM		5:00PM	8.0
Thu 4/05			8:00AM		12:00PM	1:00PM		5:00PM	8.0
Fri 4/06	Adverse Weather Cond II Paybk	2.0							
			8:00AM		12:00PM	1:00PM		5:00PM	8.0
Sat 4/07									
Sun 4/08									
Mon 4/09									
Tue 4/10									
Wed 4/11									

The two extra hours worked are subtracted from the logged hours and entered on a new line as Adverse Weather Cond II Paybk.

5. Click Save.
6. View the Totals for the week.
7. As with the leave time payback on page 153 above, the accruals will show the payback time as Adverse Weather Cond II Repaid for a short period of time, then the payback hours will move to the Adverse Weather Cond II Expired accrual balance.

About the employee's paycheck:

The employee will not be paid for the extra hours worked because they were already paid for those hours following the severe weather event.

Understanding TIM Adverse Weather Condition II Accruals

Adverse Weather Cond II ***Owed*** *accrual balance*
Shows the number of Adverse Weather Cond II Owed hours that have been accrued in the last 90 days as a negative number.

Adverse Weather Cond II ***Repaid*** *accrual balance*
When time owed is paid back, the time briefly appears in the Adverse Weather Cond II Repaid accrual balance. After a short period of time the positive Repaid amount moves to the Adverse Weather Cond II Expired balance.

Adverse Weather Cond II Expired *accrual balance*
There are two conditions in which hours will appear in the Adverse Weather Cond II Expired balance.

2. When Owed time is repaid—either by using leave time or by working extra hours—the hours paid back move to the Expired balance after a short processing period. In this case the Expired hours show as a positive number. 90 days after the severe weather event the Expired balance (+) plus the Owed balance (-) should equal 0. If they do, these two balance will revert to 0.0 at that time.
3. When Owed time is not repaid within 90 days, the overdue Owed hours move into the Expired balance as a negative number. These hours must be repaid immediately.

Accrual Example

January 4, 2017: After a snowstorm a manager adds 8 hours of Adverse Weather Cond II Owed to an employee's timesheet. The Owed accrual balance shows -8 hours.

Accrual Code	Accrual Available Balance
Adverse Weather Cond II Expired	0.0
Adverse Weather Cond II Owed	-8.0
Adverse Weather Cond II Repaid	0.0

January 19, 2017: The employee works an extra four hours in the week with a Holiday and the manager codes the hours as payback. After briefly appearing in the Repaid balance, the +4 hours move to the Expired balance.

Accrual Code	Accrual Available Balance
Adverse Weather Cond II Expired	4.0
Adverse Weather Cond II Owed	-8.0
Adverse Weather Cond II Repaid	0.0

January 31, 2017: The employee works four more hours in a week when leave was taken to use as payback, which brings the expired balance to +8.

Accrual Code	Accrual Available Balance
Adverse Weather Cond II Expired	8.0
Adverse Weather Cond II Owed	-8.0
Adverse Weather Cond II Repaid	0.0

April 4, 2017: 90 days have passed since the January 4 hours Owed time was added. The balance Expired (+8) cancels out the balance Owed (-8) so both balances go back to 0.0 (+8 + -8=0.0).

Accrual Code	Accrual Available Balance
Adverse Weather Cond II Expired	0.0
Adverse Weather Cond II Owed	0.0
Adverse Weather Cond II Repaid	0.0

Condition III

The University is closed. All non-essential employees will be paid for time missed. TIM Administrators or Managers will need to enter the Adverse Weather Condition III Closed pay code and hours in employees' timecards.

Condition II & III—Severe Weather Essential Employees

SHRA **Non-exempt** severe weather essential employees who are required to work during either Condition II or III will receive Adverse Weather ETO hours for each hour worked. To be eligible for Adverse Weather ETO hours, 'Severe Weather Essential' must be indicated on the employee's record in ConnectCarolina.

- Hours worked by a designated SHRA Non-Exempt severe weather essential employee during the Adverse Weather Condition II or III timeframe should be recorded normally. The employee will earn regular pay for these hours.
- In addition to entering the time worked, the employee's manager or TIM Admin should add a line with the **Adverse Weather III ETO ER Emp** pay code to TIM and enter the number of hours worked during the Condition II or III timeframes. This pay code assigns an hour of leave to the employee for every hour of Condition II or III time that they worked. Note that the Adverse Weather II ETO ER Emp pay code is only available to Managers in TIM immediately following adverse weather events.
- When the employee uses the extra time off, the manager needs to apply the **Adverse Weather ETO Taken** code for these hours.

❖ SHRA **Exempt** severe weather essential employees are not eligible for Adverse Weather ETO.

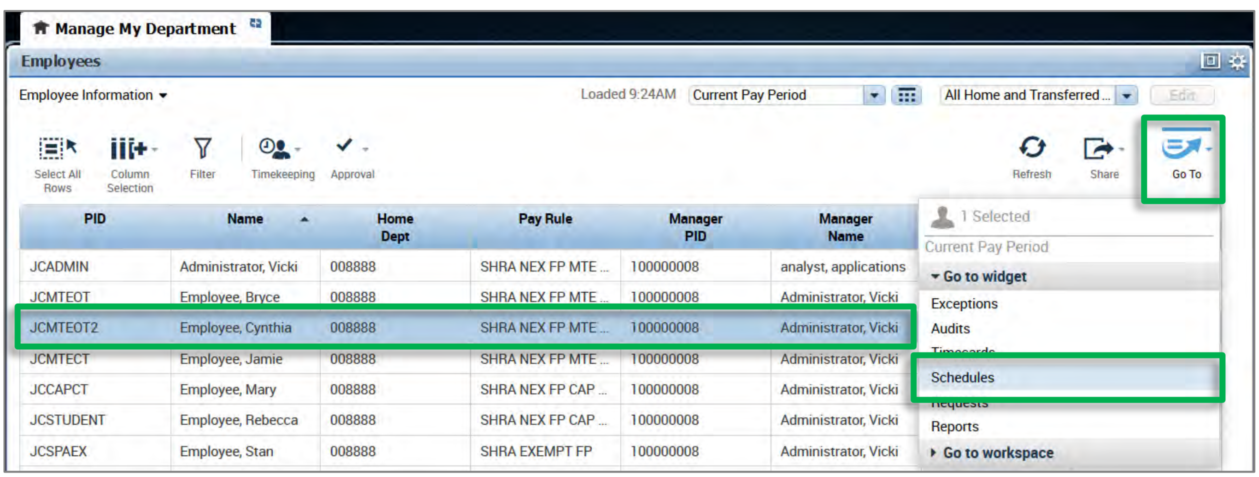
Employee Schedule Patterns in TIM

Schedule patterns are used by some departments to manage specific payroll situations. For example, a schedule pattern can be used to automatically log regularly scheduled on-call time, which the manager would otherwise have to add each pay period. Your TIM Administrator or HR representative will know whether your department uses schedule patterns.

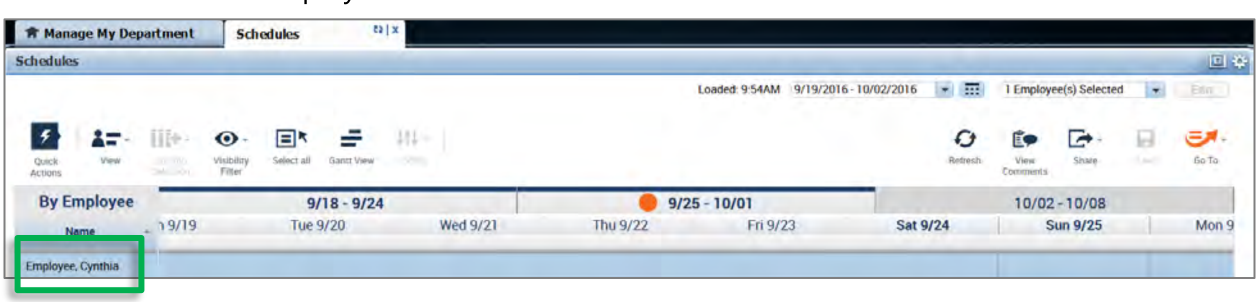
Occasionally a TIM Administrator or TIM Manager in a department that does not use schedule patterns will need to remove the pattern for an employee who has transferred from a department that does. If you are in this situation, see page 166 to learn how to delete an existing schedule pattern.

Creating a Schedule Pattern

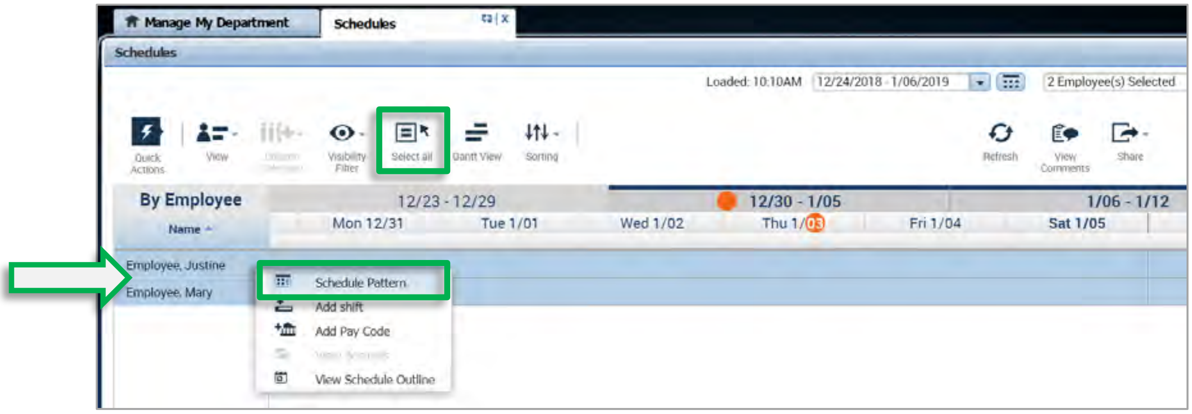
1. In the Manage My Department tab, select the employee or employees you would like to create a schedule pattern for.
2. Click Go To and select Schedules.



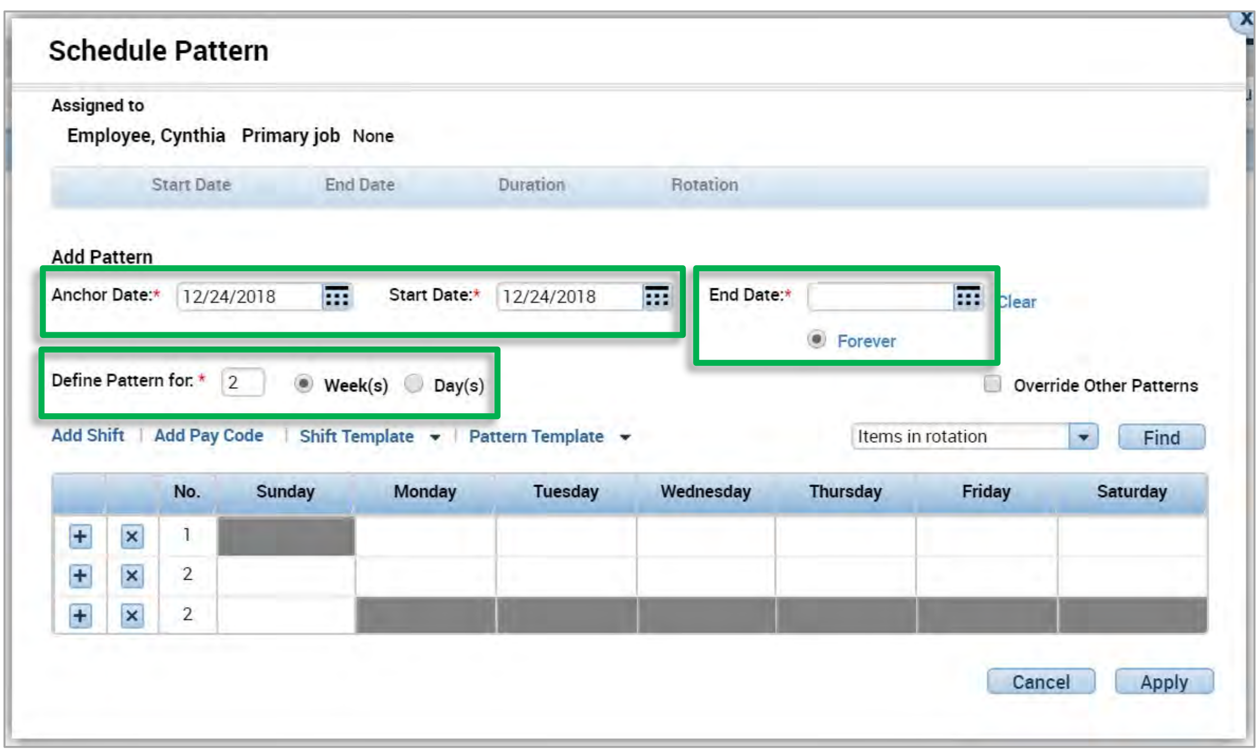
3. Double-click the employee's name.



Or, if you are creating the exact same schedule for more than one employee, hold the Ctrl key and click on the employees' names. Then, right click on a highlighted employee's name and select Schedule Pattern.



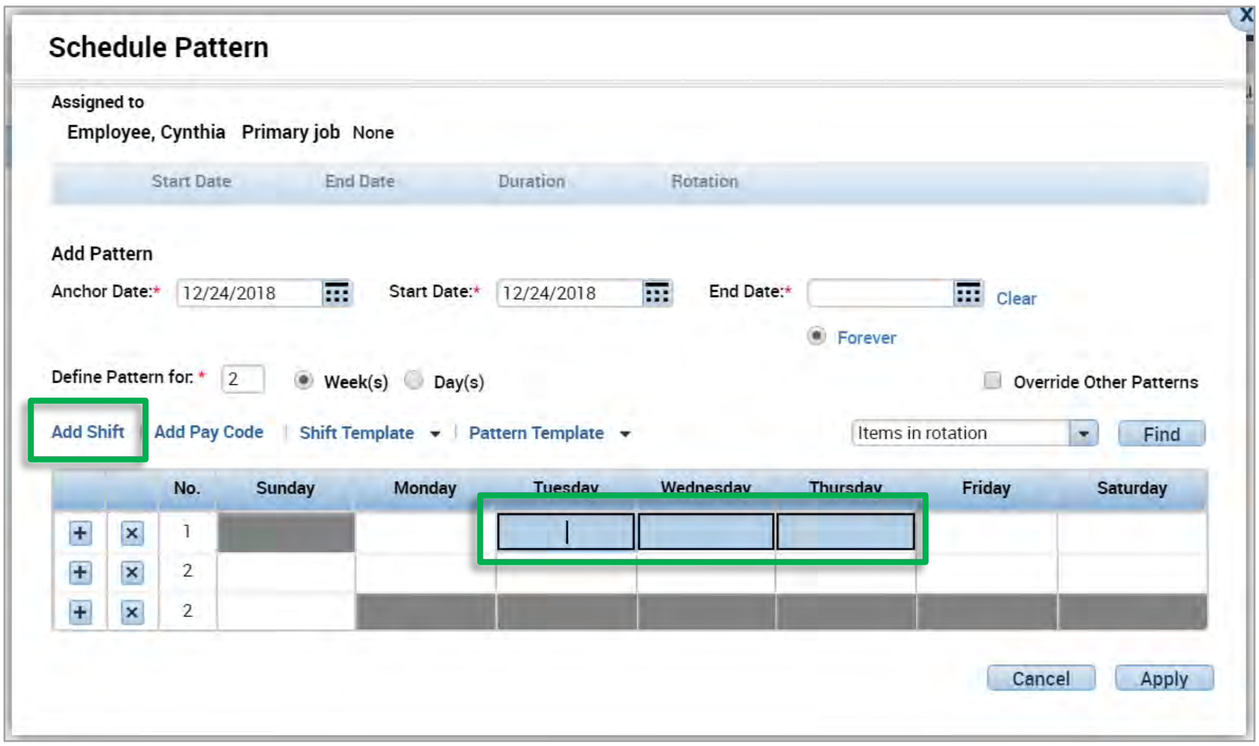
4. On the Schedule Pattern dialogue, enter the date the employee will start working this pattern in both the Anchor Date and Start Date boxes.
5. If the pattern is permanent, leave the End Date set to the default setting of Forever as shown below. If the pattern is temporary enter the appropriate End Date.
6. Determine the number of days or weeks included in the pattern. In this example, Cynthia is on call for three evenings every other week, so we will set Define Pattern to 2 weeks.



You now need to add the shifts to be worked.

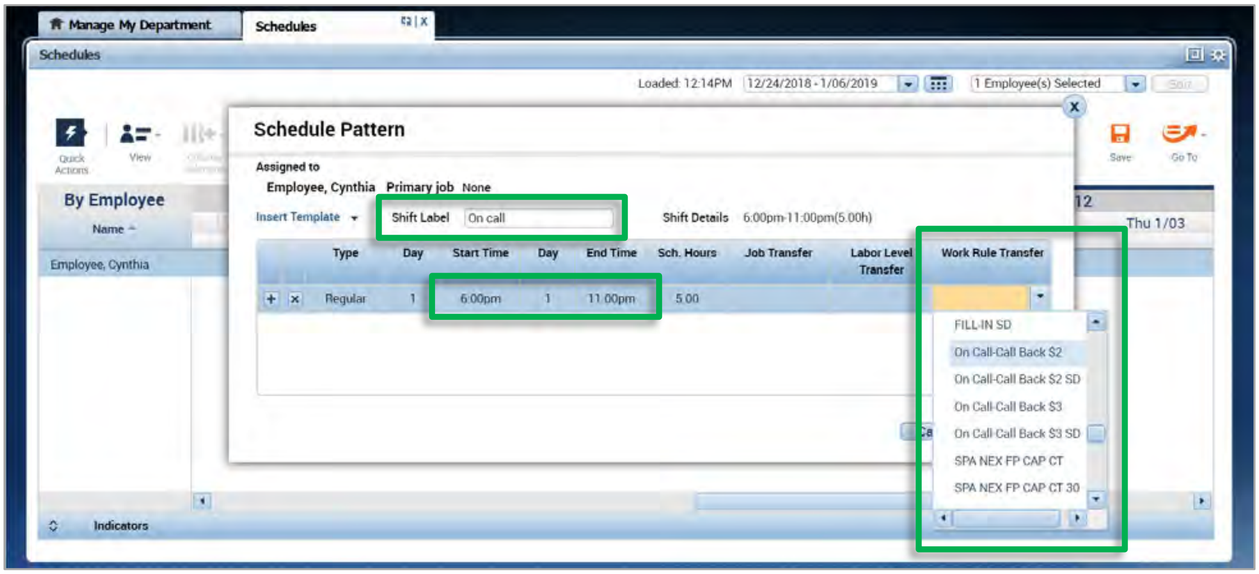
In this example we are creating a pattern that sets Cynthia's on-call hours for Tuesday, Wednesday and Thursday evening every other week. These are the hours for which she will be paid at the on-call rate.

1. Select the cell or hold the Ctrl key and select the cells under the dates to which you want to add a shift.
2. Click Add Shift.



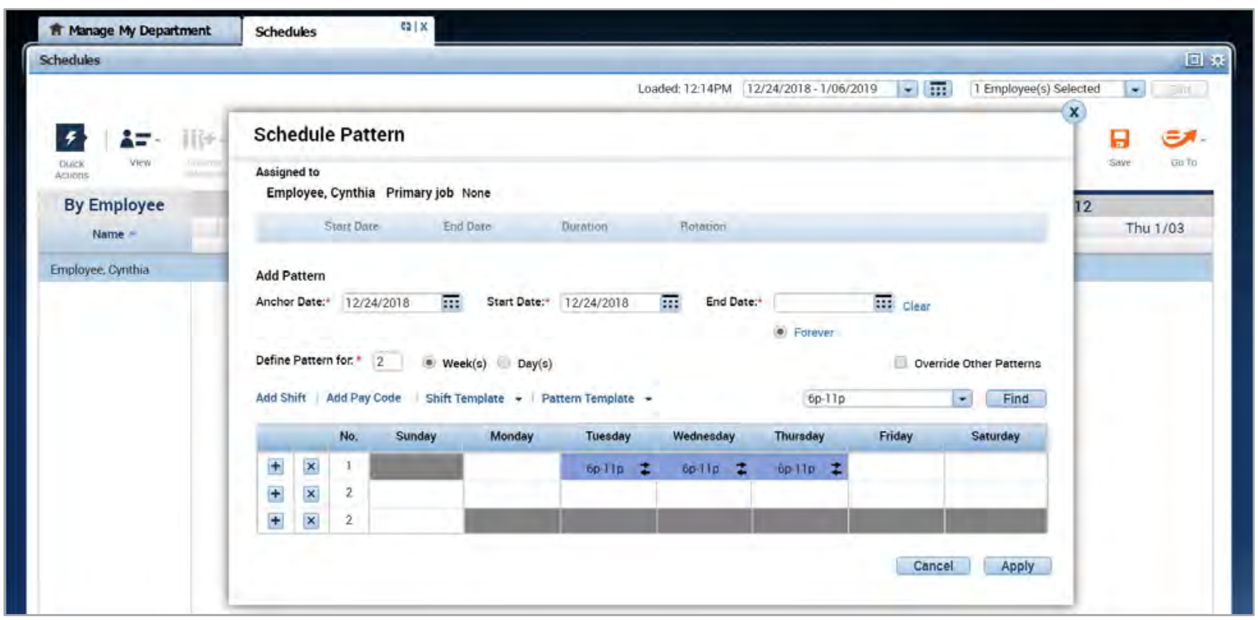
3. Add a Shift Label if you want.
4. Click in the cells to add the Start Time and End Time. Be sure to include am or pm.
5. Select the appropriate Work Rule Transfer code from the dropdown. Your selection here will define how this shift will affect payroll. In this example we select On Call-Call Back $2, which means that Cynthia will be paid $2 for every hour that she is on call. (If she gets called back during her on-call time, she will manually or via timestamp add those hours to her timecard and will be paid at her regular rate.)

6. Click Apply.

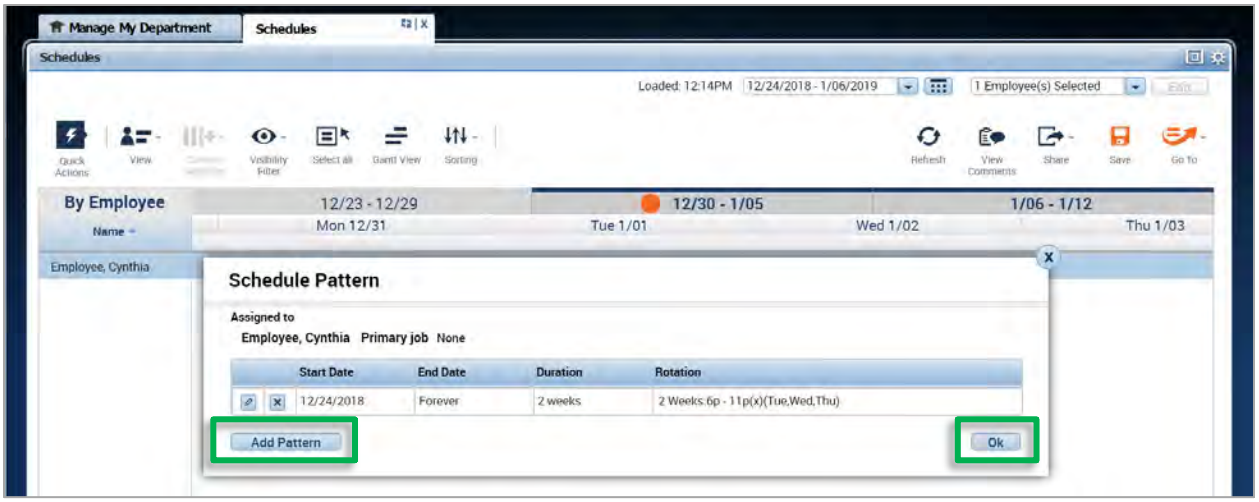


The Schedule Pattern will update to show the time entered. Note that Cynthia's schedule now shows that she is on call three days in week one and none in week two. This pattern will repeat until it is deleted or modified.

7. Click Apply again.

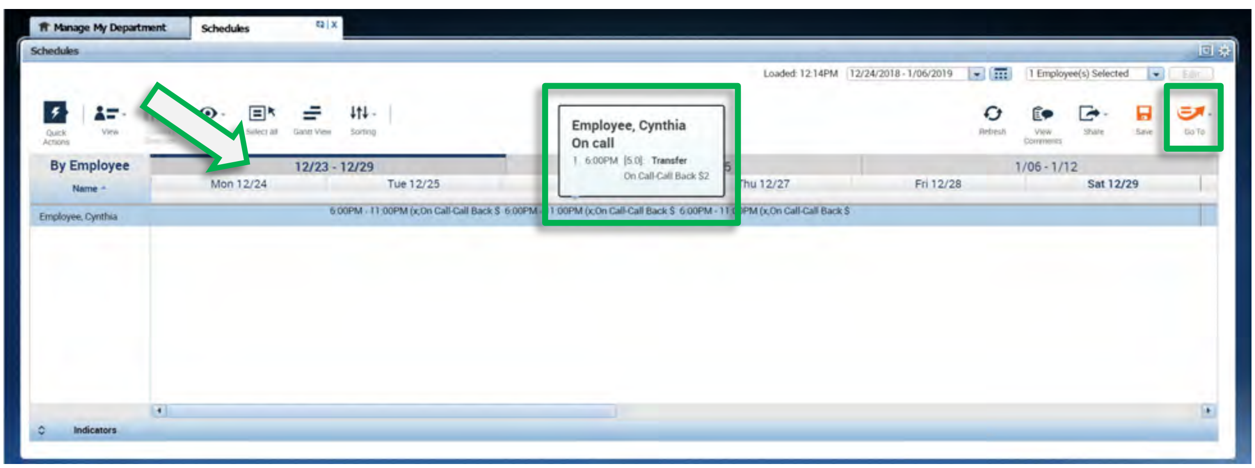


7. On the next screen you have the option to add another pattern, or click Ok to confirm.



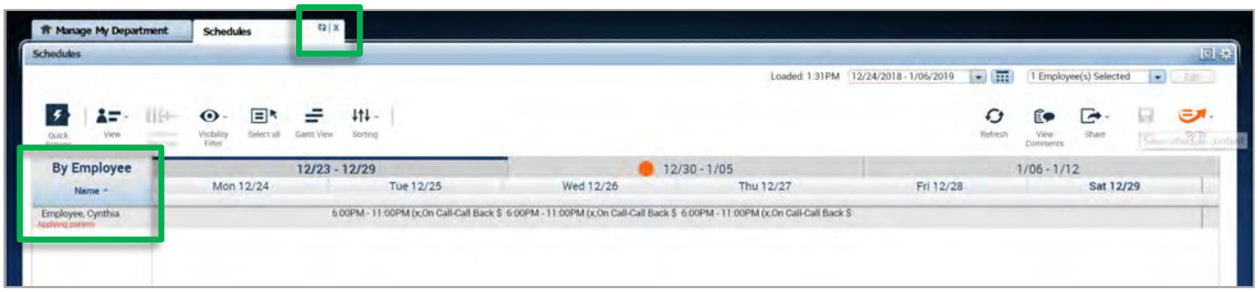
You can now scroll through the employee's schedule to view the assigned schedule pattern(s).

8. Click within the gray bar to move from one week to the next.
9. Right-click on any shift to see details, including the name of the shift if you added one.
10. Don't forget to click Save!



After saving, “Applying pattern” will appear in red under the employee’s name. This message will disappear once the pattern has been applied to all dates in the time range included.

11. Click the X at the top of the Schedules tab to return to the Manage My Department tab.



- ❖ In most cases you should not use the Shift and Pattern Templates to create your pattern.
- ❖ If your department is one of the very few that use these templates, your TIM Administrator or HR representative should provide details on what to use.

Editing Existing Schedule Patterns

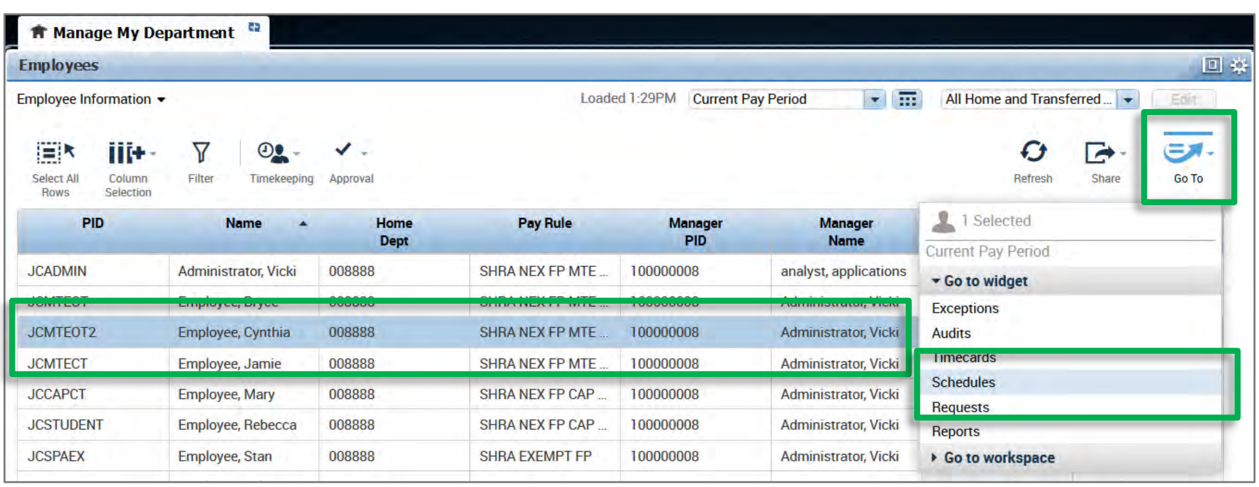
Edits to an existing schedule pattern cannot be made to time periods that have been signed off. On the Manage My Department tab, check to be sure you are viewing the current pay period.

Making a Temporary Change to an Employee’s Schedule Pattern

If you need to make a temporary change to an employee’s schedule pattern for one or more days, you can enter the change without affecting the rest of the pattern.

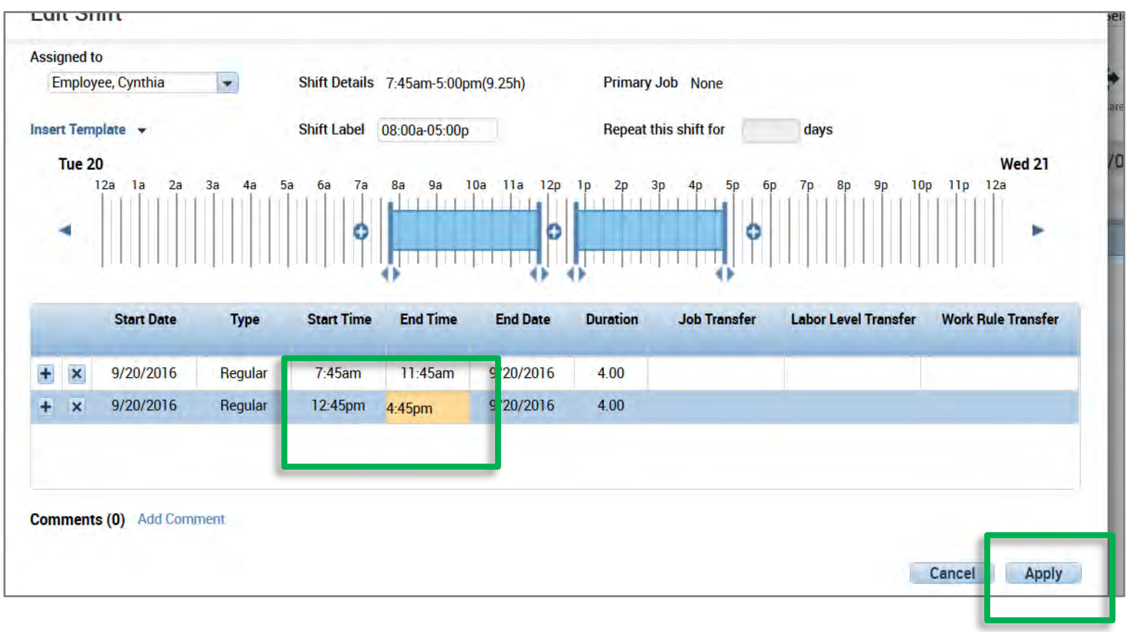
A temporary change can only be made for one employee at a time.

1. In the Manage My Department tab, click to highlight the employee. Then, click Go To and select Schedules.

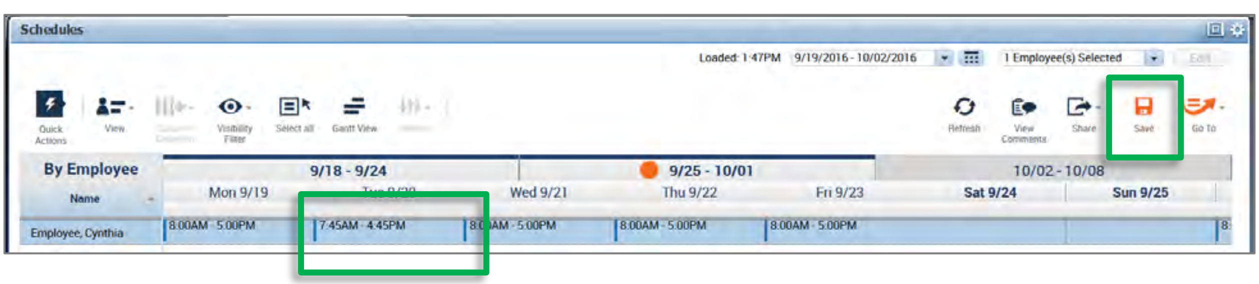


2. Locate the date that requires the change. If necessary, use the Date Range Selector to display a specific range of dates.
3. If the employee will not be working the shift at all, simply delete the shift. To modify the shift, double-click the cell located under the date that you wish to edit to open the Edit Shift dialogue.

4. Click into the cells under Start Time and End Time and enter the new start and end times for the date in the schedule that you are editing.
5. Click Apply.

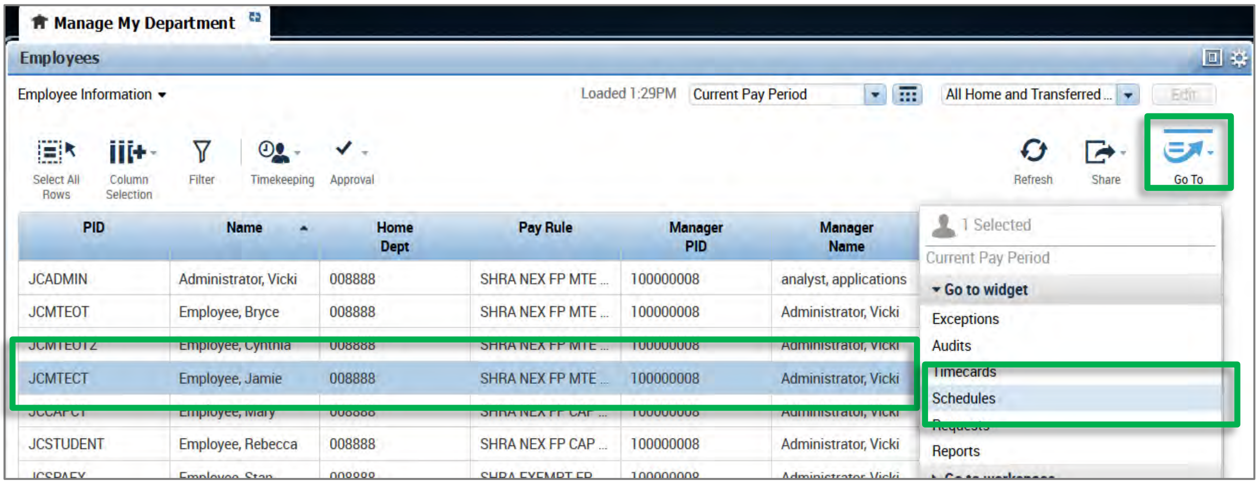


6. Make sure that the change is reflected in the cell under the edited date and then click Save.

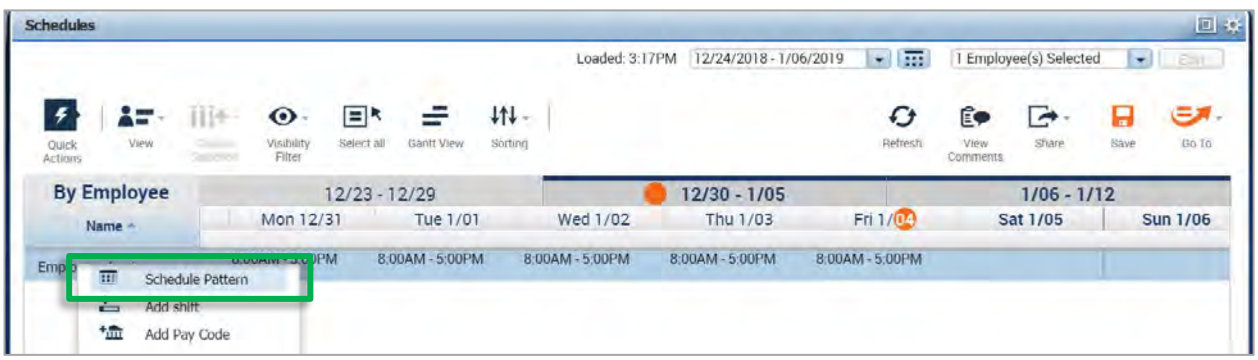


Making a Permanent Change to an Employee's Schedule

1. In the Manage My Department tab, click to highlight the employee that you wish to make a permanent schedule change for. Then click Go To and select Schedules.

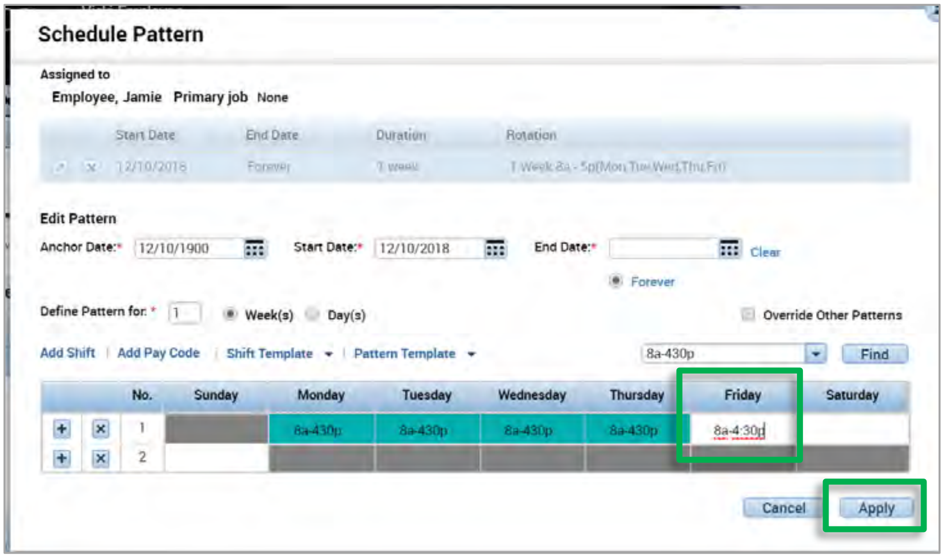


2. On the schedule tab you should see the employee's name with one or more lines showing the current schedule pattern.
3. Right click on the employee's name and select Schedule Pattern.

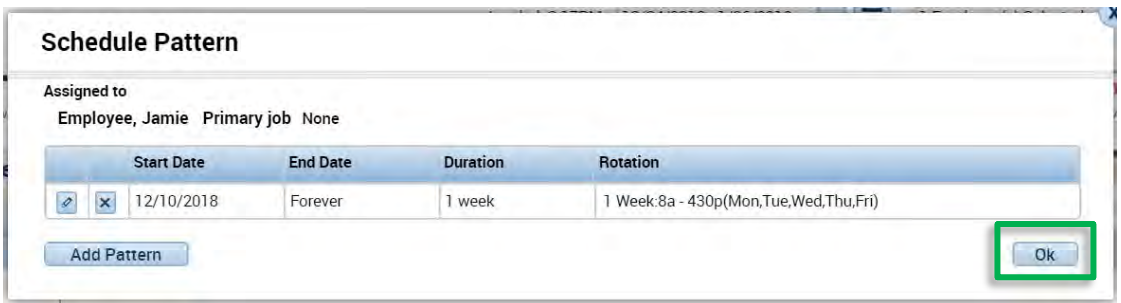


4. Click the Edit icon on the left side of the Schedule Pattern screen.

5. Modify the schedule pattern however necessary.
6. After you have made the edits, click Apply

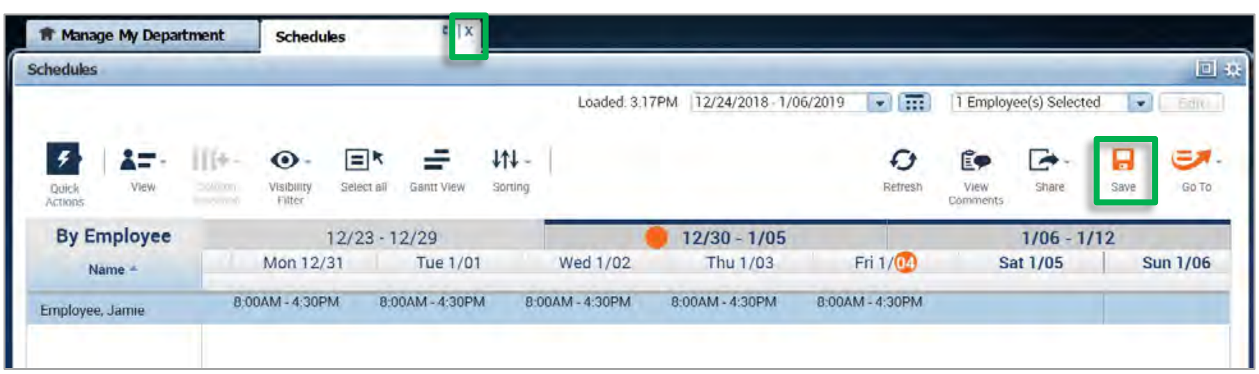


7. Make sure that the change is correctly reflected in the Schedule Pattern screen and click Ok.



8. Click Save.

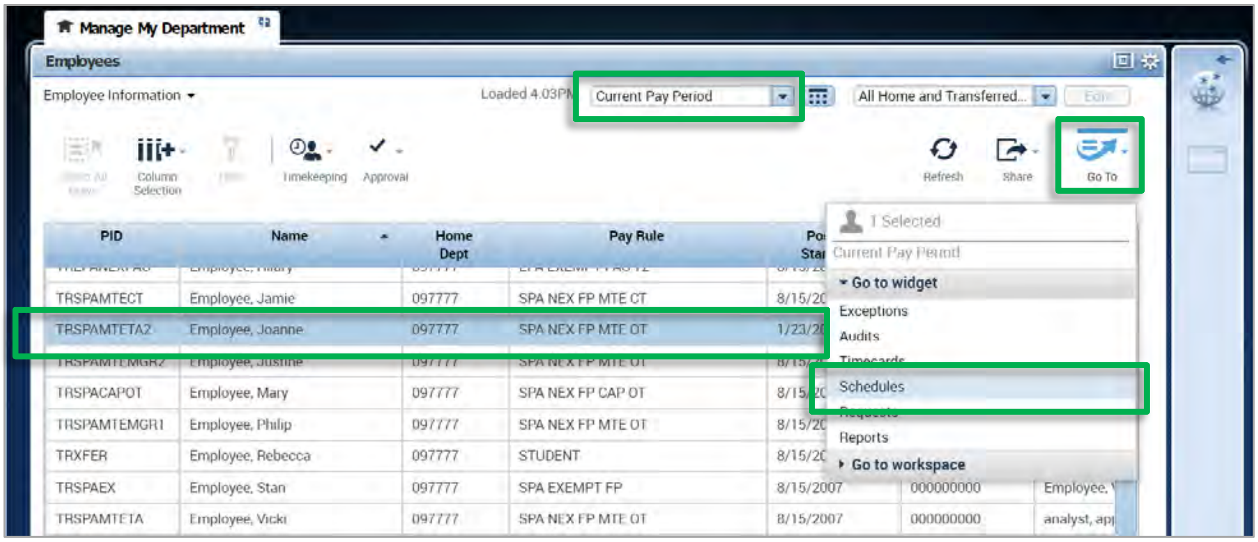
   You can then click the X in the Schedules tab to close the tab and return to the Manage My Department tab.



Deleting an Employee's Schedule Pattern

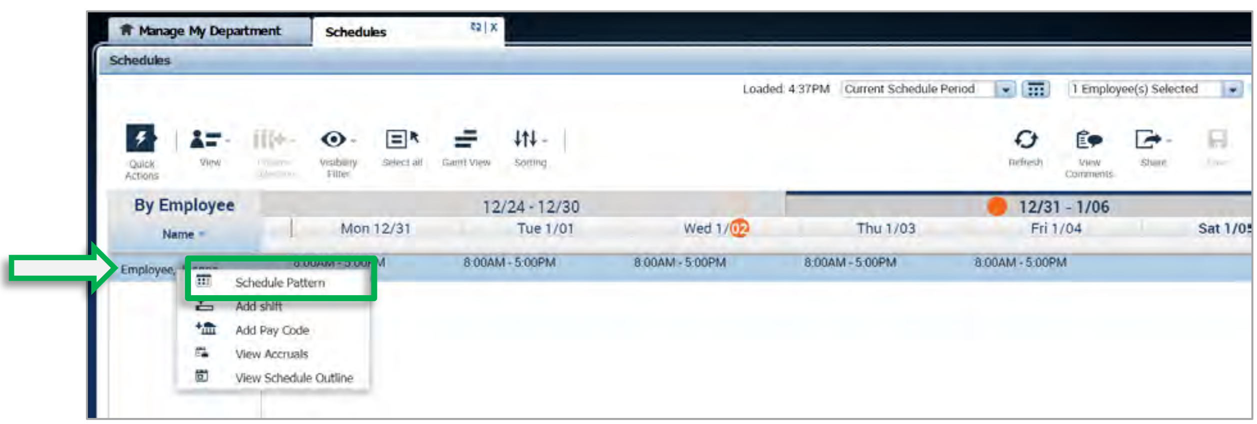
This transaction can only be performed for one employee at a time.

1. In the Manage My Department tab, click to highlight the employee. Then, click Go To and select Schedules.

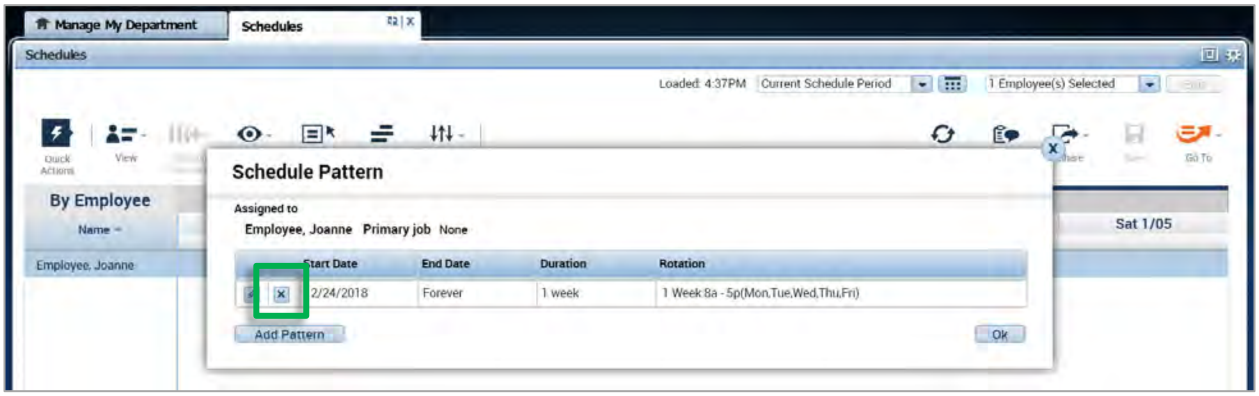


On the schedule tab you should see the employee's name with one or more lines showing the current schedule pattern.

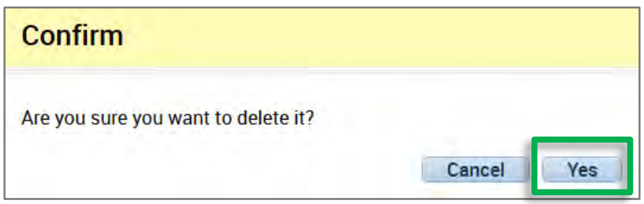
2. Right click on the employee's name and select Schedule Pattern.



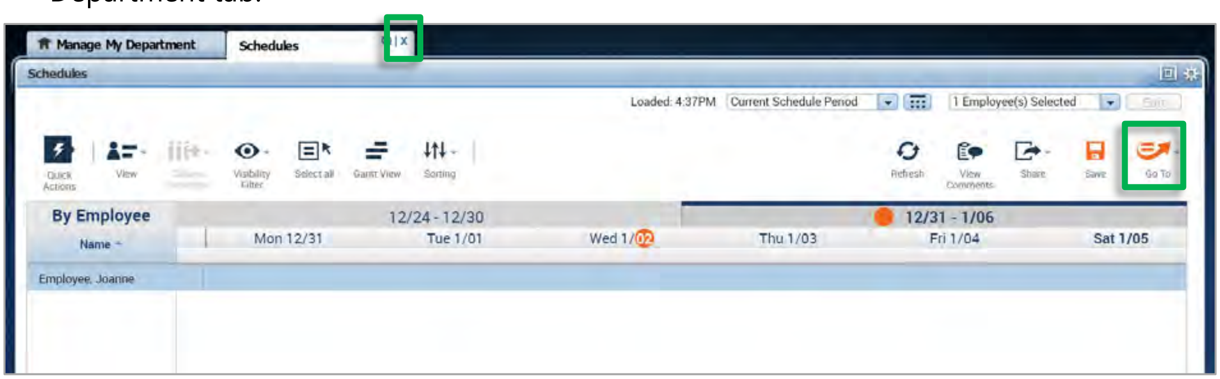
3. Click the X icon on the left side of the Schedule Pattern screen.



4. Click Yes.



5. Click Ok to close the Schedule Pattern dialogue.
6. Don't forget to click Save!
7. You can then click the X in the Schedules tab to close the tab and return to the Manage My Department tab.



Running Reports

As a TIM Manager or TIM Administrator you have access in TIM to run detailed reports.

This section will cover the following:

- How to run a report.
- How to view reports that you ran earlier in the day.
- Recommendations on how to use the reports.

Reports vs. Audits

Reports and audits both provide detailed information about TIM user activity.

❖ Audits provide quick on-screen answers to your specific data questions.

❖ Reports create reader-friendly printouts, which generally include more in-depth information and take longer to generate.

This chapter will cover several of the most common reports, and previous chapters discussed common audits.* In most cases the information discussed can be accessed in either reports or audits.

* See Using the Audits Widget at Pay Period Close (page 90) and Run an Audit to View Historical Correction Details (page 99).

Most Common Types of Reports:

Accrual Detail Report

Use to review accrual earnings, takings, and balances over a range of dates.

The Accrual Detail Report should be used if you or the employee has a question regarding their accrual balance, earnings, or usage.

Tip: When running an Accrual Detail Report you should always select a range of dates. This will ensure that previous accruals for the employee are shown and can be taken into account.

Time Detail Report

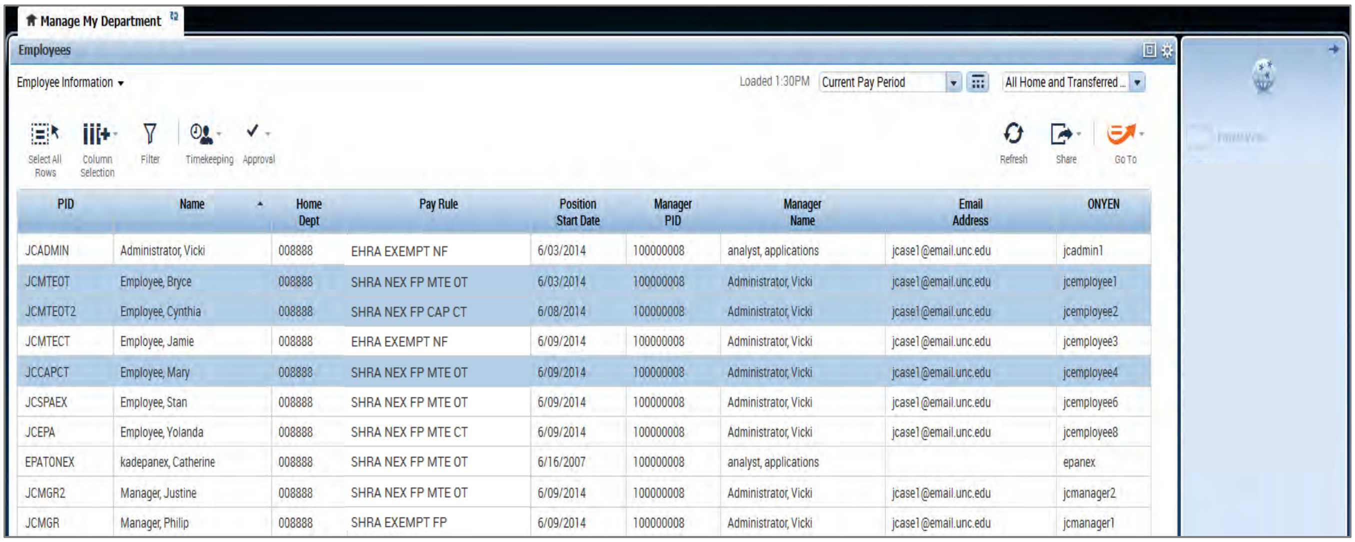
Use when an employee's timecard was not approved by either the employee or the manager.

If the employee’s timecard was not approved prior to the sign off deadline for payroll processing, either by the manager or the employee, the TIM Manager or TIM Administrator must run and print the "time detail report" for that pay period.

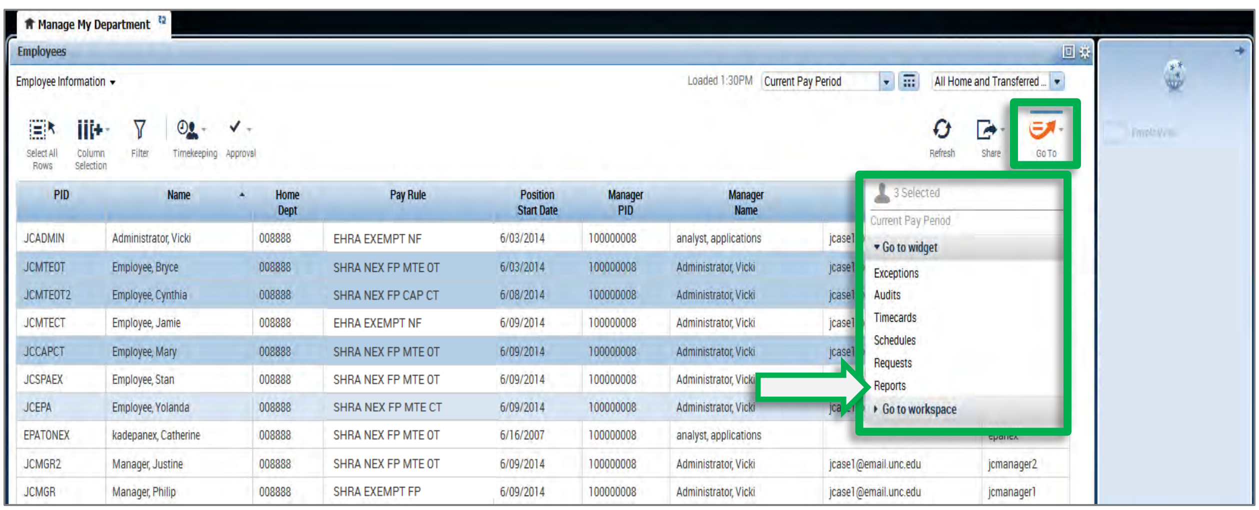
As per Audit standards, the printed report must be signed by the employee and/or the manager, and placed in the employee's file in the department.

Running a Report

1. You must first select the employees that you want included in the report. In the Manage My Department tab, click to highlight a single employee or hold the Ctrl key to select multiple employees.

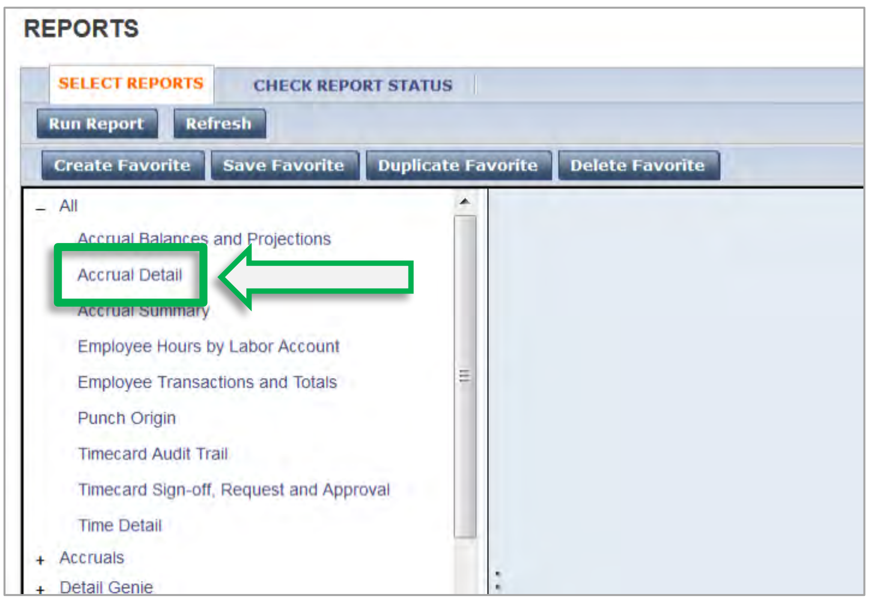


2. Then click the Go To icon and select Reports.



3. The Reports tab will open. Click the plus sign to the left of All to view a list of available reports.

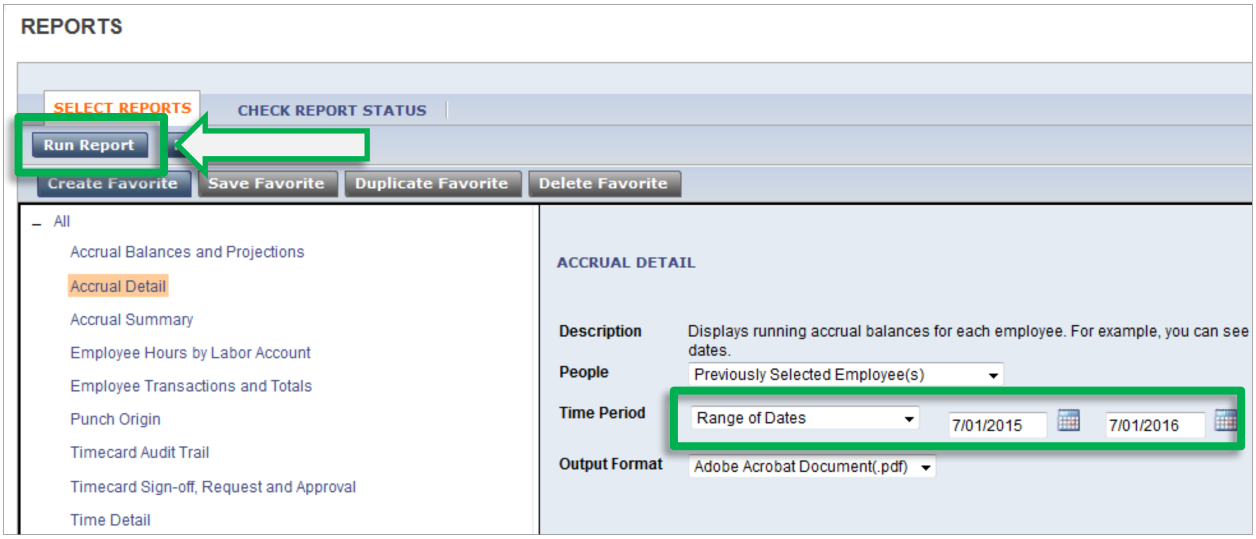
4. For this example, we will show how to run an Accrual Detail Report. To run an Accrual Detail Report, click Accrual Detail.



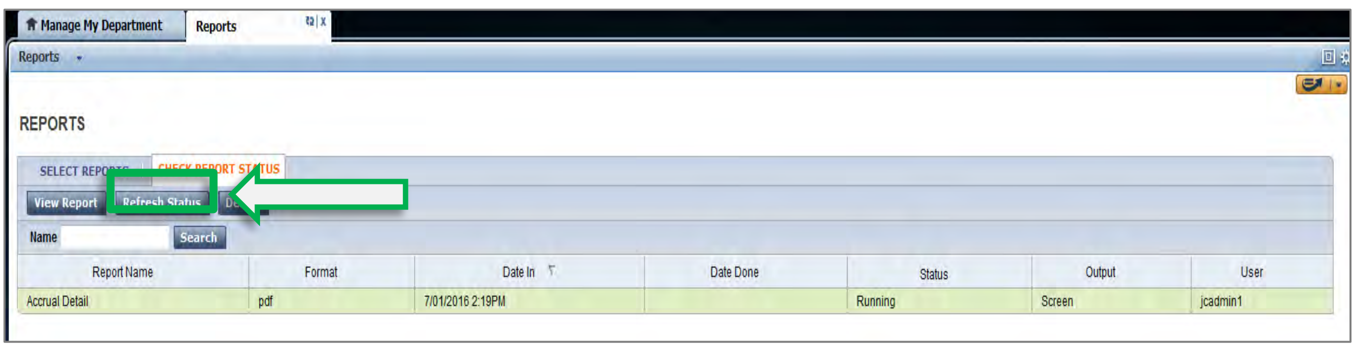
5. When the Accrual Detail Options Screen opens, select a Time Period for the report. TIM provides multiple time periods to choose from including Previous Pay Period, Current Pay Period, Next Pay Period, and Range of Dates.

❖ If you select Range of Dates, it is generally a good idea to go back one year from the current date. For example, 7/1/2017 to 7/1/2018.

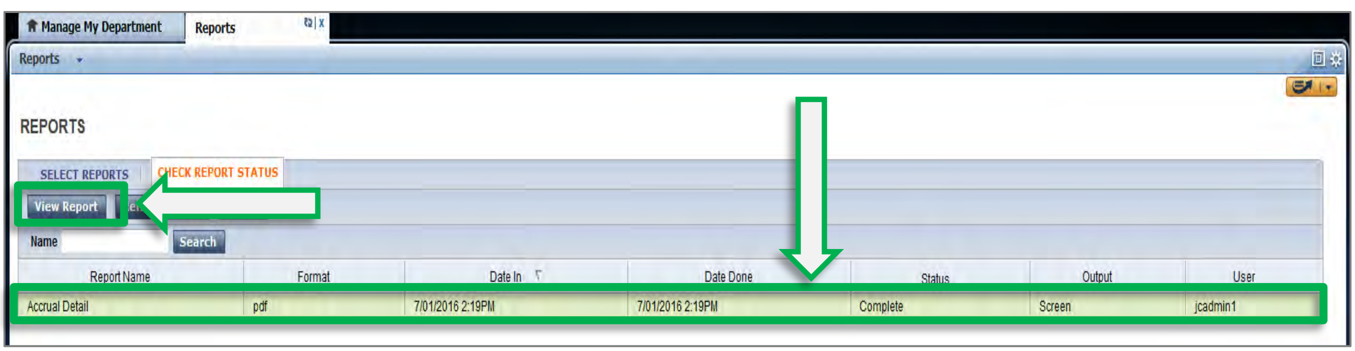
6. Click Run Report.



7. The Check Report Status tab will automatically appear. Click Refresh Status to complete the report.



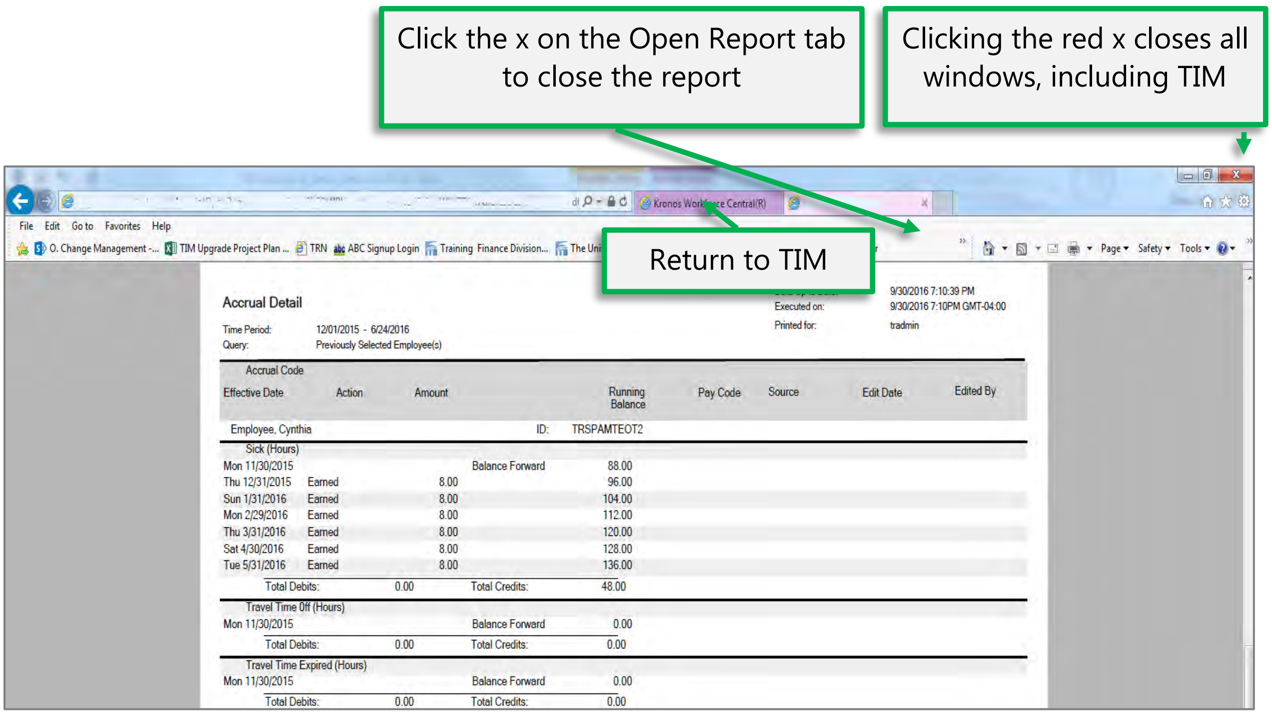
8. To open the report, double click on it or click to highlight it and then click View Report.



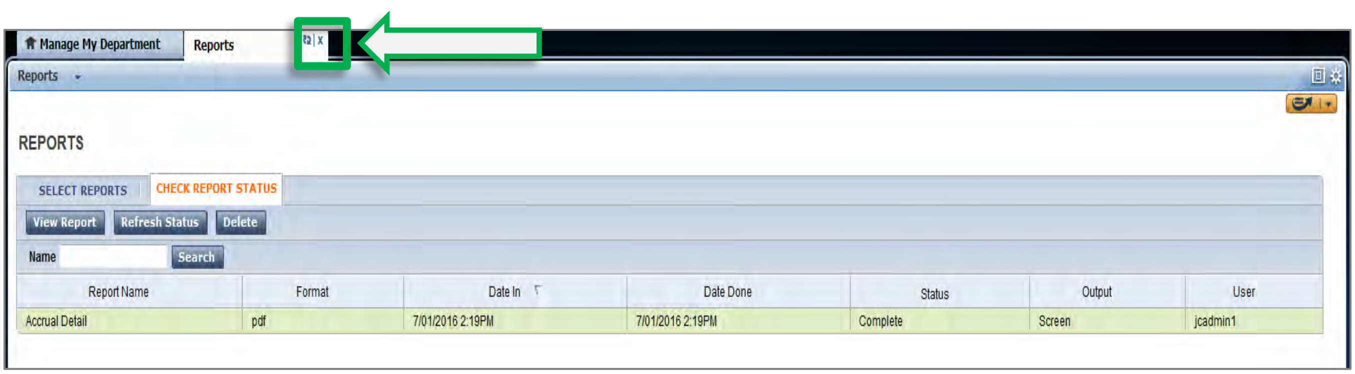
9. The report will open in a new tab in your internet browser. Reports are PDF files and can be printed or saved.
10. To close the report, click the x on the Open Report tab.

❖ Be sure to avoid clicking the red x in the top right of your screen, this will close all windows including TIM.

11. To go back to the TIM application, click the Kronos Workforce Central tab.



12. To close Reports, click the X in the Reports tab header.



Recommended Reports for Identifying Suspicious Activity in TIM

TIM provides a variety of reports and related items that can help identify inappropriate behavior. Managers should run and review the reports relevant to their team on a regular basis.

Sample helpful reports:

Students and temporary employees: run Punch Origin report

- Are there excessive edits?
- Are the time stamps from unfamiliar IP addresses? UNC internal IP addresses all begin with 152 or 172.

Punch Date/time	User	Client	Server	Data Source
Filley, Joanne J			ID: [illegible]	
7/25/2016 9:02:00 AM	[illegible]	152.2.215.40	unctim.unc.edu	Timestamp - HTML
7/25/2016 5:31:00 PM	[illegible]	152.2.215.163	unctim.unc.edu	Timecard Editor
7/26/2016 9:02:00 AM	[illegible]	152.2.215.40	unctim.unc.edu	Timestamp - HTML
7/26/2016 5:14:00 PM	[illegible]	152.2.215.40	unctim.unc.edu	Timestamp - HTML
7/27/2016 8:59:00 AM	[illegible]	71.52.232.61	unctim.unc.edu	Timestamp - HTML
7/27/2016 5:32:00 PM	[illegible]	152.2.215.40	unctim.unc.edu	Timestamp - HTML
7/28/2016 8:26:00 AM	[illegible]	152.2.215.40	unctim.unc.edu	Timestamp - HTML
7/28/2016 5:50:00 PM	[illegible]	152.2.215.163	unctim.unc.edu	Timecard Editor
7/29/2016 8:24:00 AM	[illegible]	71.52.232.61	unctim.unc.edu	Timestamp - HTML

SHRA employees: run Time Detail report

- Do hours worked align with observed behavior?
- Are SHRA Permanent Non-Exempt Employees (not set to capture) entering their times in and times out on a daily basis?

The times for each day should reflect the actual time the employee started work and the actual time when the employee stopped work. Actual times out and in for meal breaks should be recorded daily as well.

Date/Time	Apply To	In Punch	In Exc	Out Punch	Out Exc	Override Amount	Adj/Ent Amount	Money Amount	Day Amount	Totaled Amount	Cum. Tot. Amount
Xfr/Move: Account		*Comment*		*Xfr: Work Rule*							
1/9/2017		8:00:00 AM		12:00:00 PM						4.00	4.00
1/9/2017		1:00:00 PM		5:00:00 PM						4.00	8.00
1/10/2017		8:00:00 AM		12:00:00 PM						4.00	12.00
1/10/2017		1:00:00 PM		5:00:00 PM						4.00	16.00
1/11/2017		8:00:00 AM		12:00:00 PM						4.00	20.00
1/11/2017		1:00:00 PM		5:00:00 PM						4.00	24.00
1/12/2017		8:00:00 AM		12:00:00 PM						4.00	28.00
1/12/2017		1:00:00 PM		5:00:00 PM						4.00	32.00
1/13/2017		8:00:00 AM		12:00:00 PM						4.00	36.00
1/13/2017		1:00:00 PM		5:00:00 PM						4.00	40.00

SHRA and EHRA exempt employees: run Employee Transactions and Totals report

- Does the leave used align with their communicated schedule?

Transactions:	Day	Date	Pay Code	Hours	Money	Days	Entered By	Datasource
	Sat	1/14/2017	Vol Shared Leave Donated-VAC	16.00	$0.00		tradmin1	Timecard Editor
	Tue	1/24/2017	Voluntary Shared Leave Received	8.00	$0.00		tradmin1	Timecard Editor
	Thu	2/9/2017	Sick	4.00	$0.00		trmteot1	Timecard Editor
	Tue	2/14/2017	Vacation	8.00	$0.00		tradmin1	Schedule Editor
	Thu	3/23/2017	Vacation	4.00	$0.00		trmteot1	Timecard Editor
Totals:	Pay Code			Hours	Money	Days		
	Regular Hrs. to be paid			88.00	$0.00	0.00		
	Total Hours			104.00	$0.00	0.00		
	Worked Hrs			88.00	$0.00	0.00		
			Totals:	280.00	$0.00	0.00		

The audits widget also has a number of options that can be used for quickly checking reporting histories. See the following sections for help running audits:

- ❖ Using the Audits Widget at Pay Period Close (page 90).
- ❖ Run an Audit to View Historical Correction Details (page 99).