Appendix C

INTIME

Integrated Nassau Time Management for Employees

Training & Reference Manual
2009

Table of Contents

WELCOME

What is INTIME?
- INTIME - Integrated Nassau Time Management for Employees
- Electronic, web based system which automates aspects of timekeeping and leave activities

INTIME is a rules-based system.
- Configured rules are based on County policies / procedures and collective bargaining agreements.
- These rules are created and automated in INTIME streamlining the County's internal controls associated with time and leave activities.
- Rules are standardized throughout County agencies and all agencies are expected to follow those rules.
- If the rules followed by an agency are different from those programmed in the system, there will be errors leading to many manual overrides.

How is security maintained in INTIME?
- INTIME Security is role based.
- Users see the pages specific to their role.
- Hierarchies define the reporting structure within departments and across the County (i.e. which employees report to which supervisors). Therefore, Security Hierarchy dictates what employees can see.

INTIME Roles & tasks
- **Employee:** responsible for maintaining a work schedule
    - Clocks In / Out
    - Submits Time Off Request Forms, Missed Clock Forms, and OT Authorization Forms to Supervisor
    - Views their balance/personal information
- **Timekeeper (Department Payroll):** Responsible for **editing** employee time
    - Reviews and verifies hours worked by employees
    - Key in time entries once approved (i.e. Call-ins)
    - Enters Overrides (i.e. Part-Timers, Grace-Unpaid (GR-U), Left Late (LL), Permanent OT Code)
    - Point of contact to assist employees and Supervisors in obtaining information maintained in NUHRS when needed
    - Modifies shifts/shift patterns and default labor allocation

- **Supervisor:** responsible for **approving** employee time and exceptions
  - Approves Time
  - Approve Time Off Requests and Missed Clock Forms
  - Verifies employees have sufficient balance when requesting time off ('Other' category)
  - Enters Overrides
  - Monitors for Time and Abuse
  - Enforces County policies
  - Reviews INTIME Reports
  - Modifies shifts/shift patterns and default labor allocation
- **Department HR:** responsible for assigning and maintaining employee data.
  - Assigns default shift patterns
  - Assigns Security data, including Proximity Badge number and Security Group
  - Modifies and maintains Reader Groups and Employee Teams
  - Updates/Edits Proxies and Delegates
- **Department Head:** overall responsibility for time and leave activities within department
  - Ability to perform or delegate supervisor and hr time and leave tasks
  - Reviews and approves/declines OT Authorization Forms
  - Assigns a Delegate to approve/decline OT Authorization Forms (Optional)
- **Viewer:** responsible for generating and viewing reports to flag exceptions
  - Support staff by generating and analyzing reports
  - Read only access based on security
- **Auditor:** responsible for reviewing County wide data for accuracy and compliance
  - Reviews INTIME reports
  - Read only access
  - View County wide data
- **Central User:** ability to view and update County wide data
  - View County wide data
  - Creates new values

What data and actions will be carried out in NUHRS and some in INTIME?

System Functionality ...

INTIME

- Time Entry
- Employee Requests for Time Off and OT
- Time Authorization
- Scheduling
- Balances

NUHRS

- Payroll Calculations
- Leave Balances and Accruals
- Official Employee Records
- HR Transactions (New Hires, Step Increases etc.)

Category	Activities	NUHRS	INTIME
Accrual/Leave	Manage Accrual Balance for Military Leave, Donated Sick Leave, Emergency Comp, WTC Comp OCPA/OCPC	X	
Accrual/Leave	Manage Accrual Balance for Family Medical Leave, Supplemental Leave at Half Pay LEAV	X	
Accrual/Leave	Manage Accrual Balance for Holidays	X	
Accrual/Leave	Manage Accrual Balance for Blood Days LEAV	X	
Accrual/Leave	Convert balances of Sick and Vacation from P/T hours to F/T days PP1C/PP1A	X	
Accrual/Leave	Enter and apply Department approval for adjustments to Leave Progression and Longevity Dates ESM4	X	
Docking Time	Process Disciplinary Pay Dock OCPA/OCPC	X	
Docking Time	Process No Pays	X	
Docking Time	Rescind accrual for entries that do not comply with the 30% rule (CSEA 43-1)	X	
Docking Time	Reenter time usage for reversal/reissue of employee check	X	X
EFT/Direct Deposit	Enter and apply Department approval for Direct Deposit requests	X	
Mileage	Manage Mileage rates PP1A/PP1C	X	
Pay	PP2C (Employees receiving pay per session)	X	
Pay	Process Hazardous Pay	X	
Pay	Manage Longevity (*A CS37 form, where appropriate, will still be required per existing County policy)	X	
Pay	Enter and apply Stipends (*A CS37 form, where appropriate, will still be required per existing County policy)	X	
Personnel Actions	Enter and apply Department approval on all Personnel Actions ESMT & ESM3	X	
Restoring Time	Restore Accrual Balance per Workers Comp Award OCPA/OCPC	X	
Restoring Time	Process Prior Service Credit	X	
Restoring Time	Process Stipulation Settlements	X	

		X	X
Restoring Time	Reverse UAWP's (Leave Without Pay) to generate pay for employee using appropriate Time Code		
Restoring Time	Update Accrual Balance retroactively for Time and Leave for Supplemental Leave Half Pay (T & L for SLHP), Positive Pay, FMLV to generate pay for employee using appropriate Time Code	X	X
Restoring Time	Accrue SL for late submission of New Hires (1/2 day per pay period)	X	
Severance	Exhaust Accrual Balances for Vacation, Sick, etc. for severance payment	X	
Severance	Monitor 3 pay severances	X	

Overview
- Currently, County employees typically sign in / out manually each day using paper Timesheets. With INTIME, time is entered and tracked electronically.
- INTIME Self Service Users will be trained on the Time Entry Method appropriate to their department.
- Time Entry Methods will vary department by department; an effort has been made to map the most relevant Time Entry Method to each department.

Grace Period - CSEA
- A 6 minute Grace period is built into INTIME. However, this grace period only applies to the beginning of the employee's scheduled start time. If an employee takes time off at the beginning of the day, the grace period does not apply. For example, if an employee has taken a ¼ day of vacation at the beginning of the day (from 9:00-10:45am), he/she is expected to clock in and start work by 10:45am that day.

Administer time reporting/recording
  o Employees will record time worked using one of the time entry methods below:
    - Use Proximity Badges or FOBS
    - Record directly on the Timesheet

- Timekeeper records time for Roll Call
- Timekeeper submits overrides on Timesheet for Call Ins
  - o INTIME will automatically apply pay rules to the time that has been entered
  - o Time is auto-authorized based on these rules
  - o Unauthorized time will require manual approval by Supervisor
  - o Supervisor or Timekeeper runs the Employee Punches by Day Report daily

Key Points:
- INTIME will provide a default period for lunch for full time employees. This default lunch does not mean that the employee will be required to take their lunch during that period of time.
- Timekeeper / Supervisor will be required to review INTIME Timesheets to make sure there are no errors.
- Hourly employees that do not have a default shift on their timesheets must clock out / in for lunch.

Clocking In / Out – Using the Clock

The Clock will include the following after each entry:

- Employee Name
- Time of Clock In / Out
- Date

* A user clocks in / out by waving their Proximity Badge over the clock reader space highlighted above.

Tips for Clocking In / Out
- The Nassau Swipe Screen must be showing before waving your card or you will get an error (this happens if you clock in too soon after the person before you).
- The clock will beep once if the swipe is successful and three times if there is an error (Note: Some clocks will be muted).
- If the clock happens to be down, you will be notified of how to clock your time by your Supervisor or Dept HR.
- "Transaction Queued" message indicates that the clock-in/out has been registered. INTIME validates that employees have an **even** number clocks each day. For Full Time employees this means ON and OFF clock times each day. For hourly employees (PT, Seasonal etc.) that do not have a default lunch on their timesheets, this means an ON, OFF, ON and OFF clocks since hourly employees also clock out and in for lunch. It is critical to resolve uneven clocks so time can be authorized.
  - To resolve this issue, ask your employees to submit a Missed Clock Form for each instance where they did not clock ON / OFF. Once the Missed Clock Form is

approved, the clock time will appear on the Timesheet and the time for the day can be authorized. Or for employees that have access to their own electronic Timesheet, they can enter the missing time directly onto the Timesheet along with an explanation comment. Similarly, once the time has been entered, the time for the day can be authorized.

Error Messages
- If you try to swipe twice the same minute you will get a message, "SAME MINUTE VIOLATION"
- If you get the message, "INVALID BADGE", contact your Supervisor or Dept HR
- If you get the message, "NOT ALLOWED HERE", you are not assigned to use the clocks at this location

Accessing and Navigating the Employee Transaction Manager (ETM)
- Enter your County ID number (without preceding zeros) in the User Name box
- Enter your password
    - The first time you log in, enter your date of birth (MMDDYYYY – i.e. 09191970) as your password.
- Click ENTER - Immediately you will be prompted to reset a new password.

Note: If you forget your user name/password, or get locked out of the application (after 5 unsuccessful attempts), you will need to contact IT Help Desk at 1-HELP or helpdesk@nassaucountyny.gov. Do not use INTIME Workmail to contact the IT Help Desk. Contact via email must be done through Outlook.

ETM Home Page

Pages available from EMPLOYEE DATA Button

Employees can check balance accruals

Logout	Menu	Messages (0)	Go to Home Page	Set Home Page	Help	*in*Time

→ Smith, Sam

Personal Info | **Employee Balances**

Leave Balances For Smith, Sam

BALANCE TYPE	CURRENT AMOUNT LEFT	UNITS
VACATION	32.0	HOURS
SICK	0.0	HOURS
PERSONAL	0.0	HOURS

Employees can view Personal Information

Personal Info | **Employee Balances**

Personal Info for Thompson, Tommy

Name	Thompson, Tommy	Shift Pattern	M-F 9:00A-5:00P
Title	Clerk 1	Supervisor	Sam Smith
Original Appointment Date	13-Sep-2008	Leave Progression Date	13-Sep-2008
Union	CSEA		

Pages available from WORK SCHEDULE Button

Employees can view work schedules

Missed Clock Form
Timesheet | Daily Log | Time Off Request | Overtime Authorization

September 2008 Schedule   WEEK | MONTH

MON	TUE	WED	THU	FRI	SAT	SUN
01 **LABOR DAY** 9:00A-5:00P 09:00 ~ 17:00 authorized *	02 9:00A-5:00P 09:00 ~ 17:00 authorized	03 9:00A-5:00P 09:00 ~ 17:00 authorized	04 9:00A-5:00P 09:00 ~ 17:00 authorized	05 9:00A-5:00P 09:00 ~ 17:00 authorized	06 OFF	07 OFF
08 9:00A-5:00P 09:00 ~ 17:00 unauthorized	09 9:00A-5:00P 09:00 ~ 17:00 unauthorized	10 9:00A-5:00P 09:00 ~ 17:00 unauthorized	11 9:00A-5:00P 09:00 ~ 17:00 authorized	12 9:00A-5:00P 09:00 ~ 17:00 authorized	13 OFF	14 OFF
15 9:00A-5:00P 09:00 ~ 17:00 authorized *	16 9:00A-5:00P 09:00 ~ 17:00 authorized *	17 9:00A-5:00P 09:00 ~ 17:00 authorized	18 9:00A-5:00P 09:00 ~ 17:00 authorized	19 VAC (09:00 ~ 16:00) 9:00A-5:00P 09:00 ~ 17:00 *	20 OFF	21 OFF
22 9:00A-5:00P 09:00 ~ 17:00	23 9:00A-5:00P 09:00 ~ 17:00	24 9:00A-5:00P 09:00 ~ 17:00	25 9:00A-5:00P 09:00 ~ 17:00	26 9:00A-5:00P 09:00 ~ 17:00	27 OFF	28 OFF
29 9:00A-5:00P 09:00 ~ 17:00	30 9:00A-5:00P 09:00 ~ 17:00					

⬅ August   October ➡

Employees can view timesheet details

                                                                    Smith, Sam

Missed Clock Form
Timesheet | Daily Log | Time Off Request | Overtime Authorization

Clock Transactions for September 16, 2008   Clocks | Edits

ACTIVITY	TIME	JOB/DOCKET DATA	LOCATION
Clock On	09/16/2008 09:00 AM		
Clock Off	09/16/2008 04:45 PM		

⬅ Sep 15   Sep 17 ➡

Time Off Requests

- Employees can submit future-dated and retroactive Time Off Requests.
- Only one Time Off Type can be processed per Time Off Request Form. Employees that wish to request time off using multiple Time Off Types must submit multiple Time Off Request Forms for each approval.
- There are no *system* limits as to how far in advance an employee can request time off.
- If the Hands Off Date has passed, an employee will not be able to submit a Time Off request: it will have to be entered manually on the timesheet.
- When completing a Time Off Request
    - For full day off: leave start and end time blank
    - For fractions of a day: enter start or end time and click appropriate box in conversion chart.
- Employees that have insufficient accrual balances at the time of their request should submit a request using the 'Other' Time Off Type. Employees should reference the Time Off Request Form using the 'Other' Leave Category Job Aid for assistance.
- All Leave requests for the 'Other' Time Off Type *require* that Comments be included with the Time Off Request Form. Employees must indicate in the Comments section the Time Off Type that will ultimately be used for the request (i.e., personal, vacation). Comments entered on the Time Off Request Form will be automatically copied onto the employee's Timesheet by INTIME.
- **Employees without a default shift pattern (i.e. Part-timers, Seasonals) may <u>not</u> request Time Off using the electronic form. They will need to complete a paper leave slip. In order for an employee to be able to use the electronic Time Off Request form, the Supervisor can enter the employee's schedule onto the timesheet (via an override) on the day in which the employee is requesting time off. Subsequently, the employee can complete an electronic Time Off Request form.**
- INTIME will validate that usages are taken in the correct ¼ day increments (both on the Time Off Request Form and on the Timesheet)

> **On the Time Off Request Form:** Before you submit the Time Off Request Form, the system will validate that time is being taken in the correct ¼ day increments.
>
> 1. The following error message appears in instances where time is not requested in ¼ day increments: *Your request (Ex: 2/11/2009 9:00 – 2/11/2009 11:00) is not in a quarter day (Ex: 105 minutes) usage on 2/11/2009. This is based on your standard hours per day without lunch.*
> 2. At the bottom of the message, you will have two options: **Go Back to Form** or **Cancel***.* Click **Go Back to Form** to update the Start or End Times accordingly and resubmit. Or click **Cancel** to end the request.
>
> **On the electronic Timesheet:** If you manually try to enter an override that is not in the correct ¼ day increments (Ex: LTA – USCK, Start Time 9:00, End Time 11:05a) the

Timesheet will display a red-line error on that day alerting the user that a change is required. To resolve:

1. Click the Show Applied Overrides link.
2. Click 'Edit LTA' on the day for which the change applies; an LTA Override pop-up window will appear.
3. Change the Start and / or End Times on the Override to represent the appropriate fraction of a day.
4. Click Submit.
5. Select Apply and then Submit on the Timesheet to save your changes.

▪ INTIME will validate that COMP time is taken in the correct ¼ hour increments.
How to correct COMP usage that is not in a ¼ hour usage

On the Time Off Request Form: Before you submit the Time Off Request Form, the system will validate that COMP time is being taken in the correct ¼ hour increments.
1. The following error message appears in instances where COMP time is not requested in ¼ hour increments: *Your request (03/27/2009 09:00 - 03/27/2009 09:21) is not in a quarter hour (15 minutes) usage on 03/27/2009 (21 minutes). This is based on your standard hours per day without lunch.*
2. At the bottom of the message, you will have two options: **Go Back to Form** or **Cancel***.* Click **Go Back to Form** to update the Start or End Times accordingly and resubmit. Or click **Cancel** to end the request.

On the electronic Timesheet: If you manually try to enter a COMP override that is not in the correct ¼ hour increments (Ex: LTA – UCOMP, Start Time 9:00, End Time 9:21a) the Timesheet will display a red-line error on that day alerting the user that a change is required. To resolve:
1. Click the Show Applied Overrides link.
2. Click 'Edit LTA' on the day for which the change applies; an LTA Override pop-up window will appear.
3. Change the Start and / or End Times on the Override to represent the appropriate ¼ hour fraction.
4. Click Submit.
5. Select Apply and then Submit on the Timesheet to save your changes.

● Un-booked time reflects future approved leave time (i.e. vacation) that has not been taken.
● INTIME will not allow a duplicate Time Off Request to be approved for the same time period. If you accidentally attempt to submit a duplicate request INTIME automatically rejects the duplicate request and alerts the employee with a message similar to: "You requested time off for a period that overlaps an existing time off request. The existing request is 04/06/2008 - 04/06/2008 VAC. Please update your time off request."

- INTIME will not allow a Time Off Request to be submitted for a day where the Shift has been scheduled as 'OFF'.

The Time Off Request Form is accessed through the WORK SCHEDULE button via the ETM.

Time Off Request Form

Personal Information

Name:	Sam Smith	Orig Appt Date:	09/02/2008	Leave Progression Date:	09/13/2008

Balances

Name	Today	Un-booked		Units
VACATION	32.00	32.00	32.00	HOURS
PERSONAL	0.00	0.00	0.00	HOURS
SICK	0.00	0.00	0.00	HOURS

Your Un-booked balance is the amount of time you have left to request.
The dated balance is the estimated amount of un-booked time you will have left to request on that date.

New Request

Time Off Type: * [VACATION - FT]
Reason: [ ]

Hours Per Pay Period	Standard Hours per day	Hours per 1/4 day	Hours per 1/2 day	Hours per 3/4 day
80.00	8	2	4	6
70.00	7	1.75	3.5	5.25
67.50	6.75	1.6875	3.384	5.0625
72.00	12	3	6	9
75.00	7.5	1.875	3.75	5.625

Start Date: * [04/15/2009]   Start Time: [9:00a]
End Date: * [04/15/2009]   End Time: [10:45a]
Total Hours: [1.75]

Comments: [ ]

* - required information

[Submit]

Approved Future Requests

Cancel	Start Date	End Date	Code	Comments

Processing Time Off Requests
1. Employee submits a Time Off Request Form in INTIME
2. Supervisor receives request in his/her Workmail inbox
3. Supervisor decides to approve, reject or place in pending status
4. A notification message is sent to the employee's Workmail Inbox indicating if the request has been approved or declined
5. If the request is approved, the employee's Timesheet is populated to reflect the time off

Please note, the current process for back-up paper documentation required for leave requests, such as jury duty summons, FMLA or doctor's notes will continue. Supervisor will forward all required paperwork to Department HR for processing.

Your Un-booked balance is the amount of time you have left to request.
The dated balance is the estimated amount of un-booked time you will have left to request on that date.

New Request

Time Off Type: *	VACATION - FT	Hours Per Pay Period	Standard Hours per day	Hours per 1/4 day	Hours per 1/2 day	Hours per 3/4 day
Reason:						
		80.00	8	2	4	6
Start Date: * 04/15/2009	Start Time: 9:00a	70.00	7	1.75	3.5	5.25
		67.50	6.75	1.6875	3.384	5.0625
End Date: * 04/15/2009	End Time: 10:45a	72.00	12	3	6	9
	Total Hours: 1.75	75.00	7.5	1.875	3.75	5.625

* - required information

Comments:

Submit

Approved Future Requests

Cancel	Start Date	End Date	Code	Comments

Using the Online Conversion Chart on the TOFF

The Online Conversion Chart is used to help employees when requesting time off for one day or less. The chart should not be used for employees requesting more than one day off.

1. Enter either the Start Time or End Time (if you are taking time at the beginning of the day enter Start Time. If you are taking time at the end of the day enter end time)
2. The times entered in these fields should match your work schedule for that day
3. Click the appropriate amount of time off on the Java calculator to the right depending on how many hours per pay period you work.

For example: An employee works 70 hours per week and wants to take ¼ day off at the end of the day. The employee enters the Time Off Type and the Date. The employee, who gets out of work at 4:45pm, enters "4:45pm" in the "End Time" field. The employee clicks on the blue link 1.75 to indicate that he/she would like to take 1hr and 45 minutes off. The Start Time then populates the correct time which is 3:00pm. The employee would then click "Submit"

Cancelling / Changing Time Off Request Forms in (ETM)

If Time Off Request has been approved and date for time off is in the future:

- Navigate to a new Time Off Request Form
- Scroll to the bottom of the Form to find the section "Approved Future Requests"
- Place a check in the "Cancel" checkbox
- Click "Submit"

Approved Future Requests				
Cancel	Start Date	End Date	Code	Comments
☐	01/31/2009	01/31/2009	UVAC	

Note: The Supervisor must then "Approve" the cancellation in order for it to be removed from the employee's Timesheet.

If Time Off Request is not approved:

- Navigate to "Messages"
- Click "Forms"
- Find the appropriate form to cancel (for details click on Details under "Available Options")
- Click "Cancel"
- A Confirmation window will appear. Click "OK"

Time Off Request	PENDING	0	Waiting for a resolution from Role Group : SUPERVISOR Users: 48221, ISER, BURT, ISER	Details Cancel

Note: When cancelling a future approved Time Off Request, the employee can add a comment in the Comment box above 'Approved Future Requests'.

If time off is current day or already passed; contact Supervisor. They will have to go directly on to your timesheet to cancel/delete leave request. Open work details (+). Along the detail line of the leave time, scroll to the far right, click the trash can, click apply and submit.

Missed Clock Form

- This form is used when an employee forgets or is unable to use the proximity clock to record their start or stop time.
- The INTIME Missed Clock Form incorporates workflow that allows employees to submit their missed clock time to their Supervisor for current or past dates online.
- Employees must indicate if existing clock entries should be replaced or appended using the "Replace all clock entries for date" checkbox. If an employee selects the "Replace all clock entries for date" checkbox then the system will *replace* the existing clock information with the new clock information from the "Missing Clocks" form once approved; otherwise the system will append the clock information to the previous clock entries i.e. If you failed to clock ON at the start of your shift, but you clocked OFF at the end of your shift, then INTIME will record your OFF time as your 'ON' time. This is because INTIME reads the first clock entry as 'ON'. Therefore, the next day, you will have to enter both the ON and OFF times and select the 'Replace all clock entries for date' checkbox.
- Once processed by your Supervisor, the override information will be displayed on the employee's Timesheet

Missed Clock Form: What to enter
- Enter "Work Date" for the date in which the clock was missed
- Enter "Start Time" if a clock "on" was missed or
- Enter "End Time" if a clock "off" was missed
- Enter Comments indicating why the clock was missed

OT Authorization Form
1. Supervisor obtains offline approval from Department Head for the employee to work OT prior to beginning the OT Authorization Form process in INTIME.
2. Supervisor notifies the employee that the OT has been approved and that the employee needs to complete the OT Authorization Form in INTIME.
3. The OT Authorization form will allow the employee to request comp time or cash for approved OT pursuant to their collective bargaining agreement. However, the form will validate whether or not the requesting employee is entitled to request cash. If the employee is not entitled to cash, the form will not submit successfully.
   Note: The OT form defaults to STNDBY_CASH – Remind staff to choose cash or comp unless actually standby.

4. The "Reason" field is required information. If left blank, supervisor should reject OT form.
5. OT forms are routed up the chain of command to individuals identified by the Department Head as able to approve the OT forms for those below them or to the Department Head him/herself.
6. The Department Head can establish a delegate to approve OT Authorization Forms in INTIME. A Department Head can assign *one* delegate for *each* interaction type.
7. The employee will receive a message indicating if the OT has been approved or declined.
8. If the request is approved, the employee's schedule will be adjusted and a 'temporary' time code representing the OT Type requested is placed on the electronic Timesheet.
9. **Based on the hours worked by the employee, the Timekeeper or Supervisor will change the temporary code to reflect the appropriate permanent OT time code. It is imperative that the permanent OT code is entered as this triggers the payment for the employee.**
10. The Supervisor authorizes OT on the Timesheet before running the Pay Period Summary.

Note: Fire Commission and Fire Marshall employees using WMD and OHOME Time Codes should select a OT Type of OT_CASH_OVERRIDE on the OT Authorization Form. In the comments section, they should specify which permanent code will be entered on the Timesheet.

Key Points
It is imperative that the Timekeeper or Supervisor check the actual hours worked on the timesheet to confirm that the employee started at the pre-approved start time and worked through to the pre-approved end time. If the employee has worked the correct pre-approved overtime hours than see step 9 above. If the employee did not work the full amount of overtime then the Timekeeper or Supervisor will adjust the start / end time to correspond with the actual hours worked (i.e. OT approved for 8:00-9:00a where employee arrived to work at 8:15a, the work details for the overtime should be changed to start at 8:15a. Note: If these adjustments above are not made to the employee's Timesheet, the employee will get paid more than the amount of actual OT worked)
- If the employee works longer than the pre-approved overtime, then the employee must complete an additional Overtime Authorization Form for the additional time worked.
- OT Types include: Cash, Comp, Cash Override and Standby Cash.
- When the form is approved, a temporary code (OT_CASH, OT_COMP, OT_CASH_OVERRIDE or STANDBY_CASH) will be placed on the timesheet.
- These temporary codes will not trigger a payment of overtime. They must be replaced with the actual permanent code that will lead to payment (OACOT, AOTCP, OTOTL or DSTBY in the above cases). This manual override is a mandatory part of the process.

Temporary Code ------> Permanent Code
 OT_CASH -----------> OACOT
 OT_COMP ----------> AOTCP

Overtime Authorization Form

Personal Information

Name: Tommy Thompson	**Orig Appt Date:** 08/15/2008	**Leave Progression Date:** 09/13/2008	

New Request

OT Type: *   OT_CASH ▾   Reason : [ ]

Start Date: * [ ] 🖊   Start Time:* [ ]

End Date: * [ ] 🖊   End Time:* [ ]

Comments: [ ]

Approver Comments: [ ]   * - required information

[Submit] [Cancel]

Approved Future Authorizations

Start Date	End Date	Code	Comments

Workmail

- All County employees will have access to Workmail; this mail will not be synchronized with existing MS Outlook accounts or any other email accounts.
- Workmail is used to send and receive all INTIME related messages, and view the status of Time Off Requests, OT Authorization and Missed Clock Forms.
- Employees will see the sender's name in their inbox next to each message.
- From Workmail, Supervisors can use the:
- **Form Finder** link. This allows them to access and view forms they've acted upon. To do this:

1. Click on the **Form Finder** link located in the menu bar at the top of the screen.
2. Select the criteria. You will be able to search for forms based on: Interaction, Submitted By, Last acted on by, Status and Time period.
3. Click GO to view the results
4. Click on the **Details** link next to the form for which you wish to view the actual form approved / rejected OR click on **History** next to the form for which you to view the transaction history.

Note: **Form Finder** includes security so that a Supervisor can only see form for employees on their team. If you do not enter an Interaction when you look up an employee you will see the following message when trying to select an employee "One or more criteria are ambiguous"

- From Workmail, an employee may:
  - View Request Status
    – From the Workmail screen, click **Forms**
    – **Status** column displays the status of the request
      - **Accepted / Processed** – View processed or approved forms
      - **Cancelled** – View cancelled forms
      - **Exception** – View forms with system generated exceptions
      - **Pending** – View pending forms (default value)
      - **Rejected** – View rejected forms
      - **Resend Requested** – View forms that have been resent *to* originator
      - **Resent** – View forms that have been resent *by* originator
  - **Current Location in Flow** column displays where in the process a request is
    – Exception – the request has encountered an error (i.e., invalid workflow)
    – Flow Completed – the request has been Rejected or Accepted / Processed
    – Waiting for a resolution – the request is Pending action
    – Cancelled - Flow cancelled by originator

Viewing the Status of Submitted Forms in ETM

To view the status of your own form:

1. Click "Messages"
2. Click "My Forms"
3. Review Information under "Status" column
4. Review information under "Current Location in Flow" column
5. For more details, click "Details" under "Available Options"

Note: Supervisors can view forms they've acted upon using **Form Finder**.

Requests will show up in one of the follow statuses:

- **Accepted:** The request has been approved
- **Rejected:** The request has been rejected
- **Pending:** The Supervisor or Department Head has not acted on the request or has placed the request in a "pending" status for later review. (To distinguish between the two, click on "Current Location in Flow". If the Supervisor or Department Head has placed the request in a "Pending" Status, there will be a line item that says "ValidationExtension". i.e. In the case of a Time Off Request Form, the line would say "TimeOffRequestValidationExtension")
- **Exception:** An error has occurred. Please contact the helpdesk@nassaucountyny.gov.

Navigating the Workmail System

- Some Workmail capabilities should be familiar: Compose mail, organize mail into folders, sort messages, create and retrieve draft messages etc.
- Reviewing mail regularly will enable approvers to effectively manage Time Off Request and OT Authorization Forms.
- Receive/send INTIME mail messages
- Receive Time Off Request, Missed Clock, and Overtime Authorization Form messages
- View the status of a request form
- Cancel a submitted, pending requests form
- View details of a submitted request form

Inbox	Compose	Address Book	Folders	Forms	Batch Approvals

INBOX

Inbox-1 Unread Messages

Move Checked Items To [Folder] ▼ Go   Browse Folder INBOX ▼

Del All	From	Subject	Date ▽	Type
☐ 📕	JSMITH	Pending Time Off Request	Oct 10, 10:53 AM	Mail

- Icons
  - **Unread** - Represents unread messages
  - **Read** - Represents messages that have been read
  - **Forms** - Represents a form (also known as interaction in this document)

| Inbox | Compose | Address Book | Folders | Forms | Batch Approvals |

INBOX

Inbox-1 Unread Messages

Move Checked Items To [Folder] ▼ Go Browse Folder INBOX ▼

Del	All	From	Subject	Date ▽	Type
☐	✉	JSMITH	Pending Time Off Request	Oct 10, 10:53 AM	Mail

Training & Support

EPAK (Education Performance Acceleration Kit)
Please note that EPAK does not include recent enhancements since RO1 Go Live. Any changes to EPAK will be communicated.

- On Demand Training Tool that will be available to the County prior to and post Go-Live. This is a great Training Tool for employees. The INTIME Team encourages departments to leverage EPAK for new hires and current employees.
- To access EPAK, click the **Help** link in INTIME.
- EPAK has four modes: See It!, Try It!, Know It! And Do It!

EPAK

1. Click on the Plus sign (+) to the left of the INTIME – Nassau County **Module.**

2. Click on the Plus sign (+) to the left of the **Lesson** you would like to open.

3. Click on the name of the **Topic** you would like to view. This will populate the Concept and Introduction panes.

4. Click on the Mode in which you would like the lesson to run.
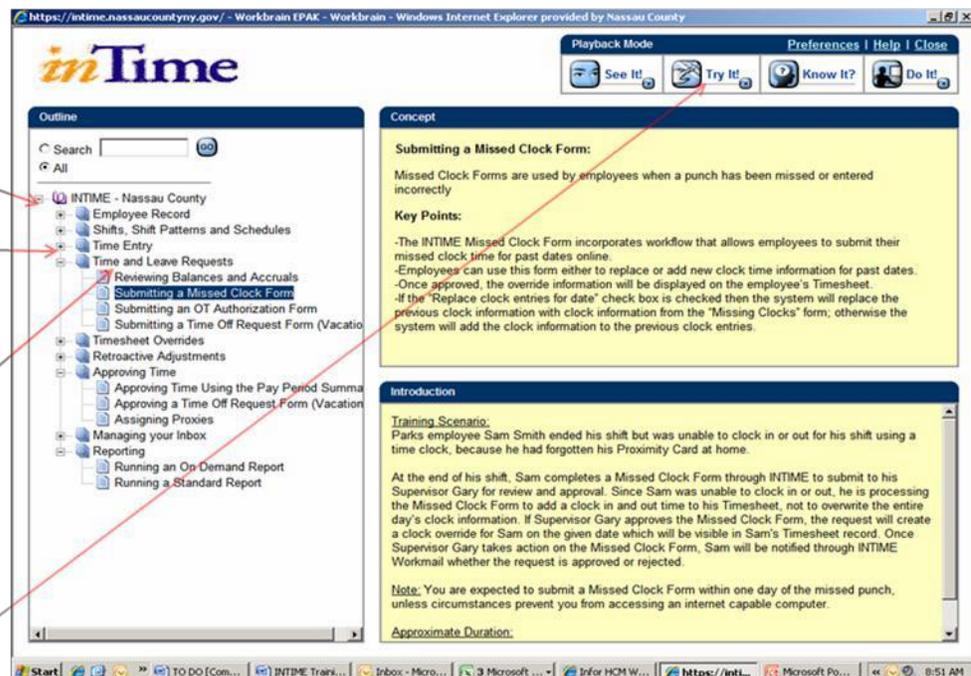
- **See It!** This mode enables you to learn by watching an animated demonstration of tasks being performed in a simulated environment. All the required activities, such as moving the mouse and entering data, are completed automatically.
- **Try It!** This mode enables you to learn interactively. The OnDemand Browser-based Player prompts you for mouse clicks and/or keystrokes as you complete tasks in a simulated environment.
- *The major difference between Try It! and See It! is that in Try It!, the user is the one executing the steps to complete the task, rather than watching the system execute the steps automatically, as in See It!*
- **Know It?** This mode enables you to test knowledge gained from On Demand training. Know It? mode is an assessment-type of playback in which you are instructed to complete the steps for a particular task and scored on how accurately you complete the

steps. At the end of the assessment, you will be presented with a score for your efforts and told if you passed or failed. Your score is not tracked or sent anywhere. Know It? mode is only available in the Browser-based Player.

- **Do It!** This mode enables you to learn interactively using live data. In this mode, you are presented with a window in the live application that displays each step for a particular task. As you complete each step, you can click a Next Step link to navigate to the next step in the process. With Do It! mode, the user can learn interactively, while they work, without leaving the live application. This makes it possible for the user to accomplish real tasks with actual data while they learn.
- Introduces training processes via a presentation and supported by EPAK. EPAK will allow users to access scenarios and lesson presentations from their desktop, even after Go-live. The access an employee has is based on their role in INTIME.
- Allows appropriate end-users to complete hands on classroom exercises in a production-like, scenario-based environment.
- Provides a multi-media approach (Microsoft Office 2003 web-based training materials). These materials include scenarios and lesson presentations.

Accessing INTIME materials through WebConnect

Further materials are available on WebConnect, the County's Intranet site.

Navigate to Internet Explorer and type only the word "WebConnect" into the address bar and hit enter.
When the WebConnect site comes up, follow the instructions below:

Click on grey bar: "Login"
Then enter User Name: First Initial of First Name and Last Name (i.e. jsmith)
Then enter Password: 12345
Click on: INTIME logo in the lower right hand corner
Click on: INTIME training
Make your selection

INTIME TASKS

Accessing The INTIME Application

Some Employees will use the Main Application to Clock In / Out:
1. **Enter User Name**
2. **Enter Password**
3. **Click LOGIN**

ETM

*in*Time

Please provide your login information to access the application.

User Name [   ]

Password: [   ]

LOGIN

Reminder: Your User Name will be your County ID number without the preceding zero.
Your default password will be your date of birth (MMDDYYYY format).

Main INTIME Navigation Screen

When you log on to the application, you can navigate using the Table of Contents on the left side of the page. Depending on your assigned security role, you may be able to see more or fewer buttons.
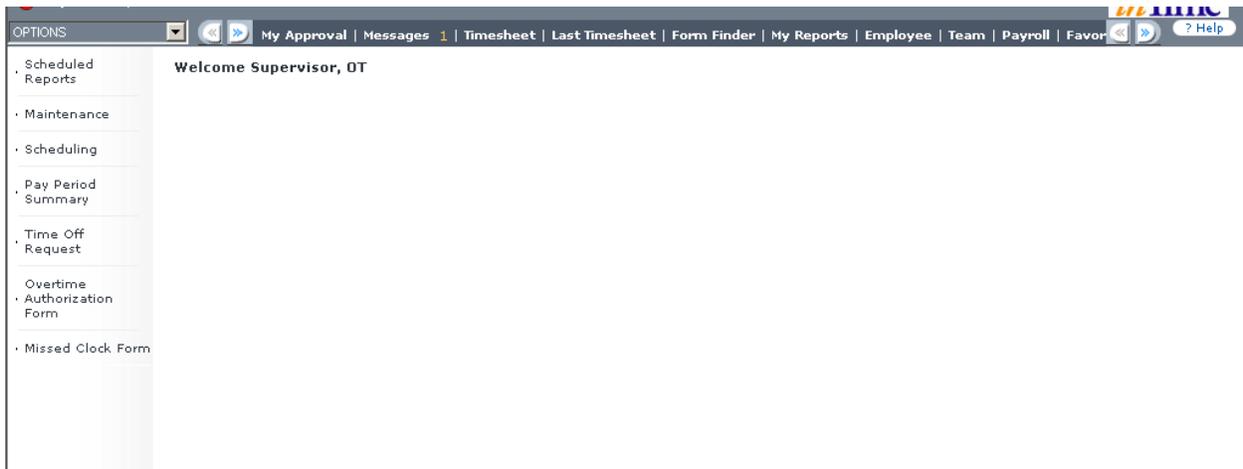
Employee Details Screen

The employee details screen can be found by navigating to Maintenance/Employees/Employee. The chain of folders for you to access are known as breadcrumbs. The screen shot below shows the top of the page for a typical Employee Details view. Note: There are short cut links located at the top of the page which direct you to different sections of the Employee page (i.e. Employee Data, Employee Leave Balance, Employee Job, etc.)
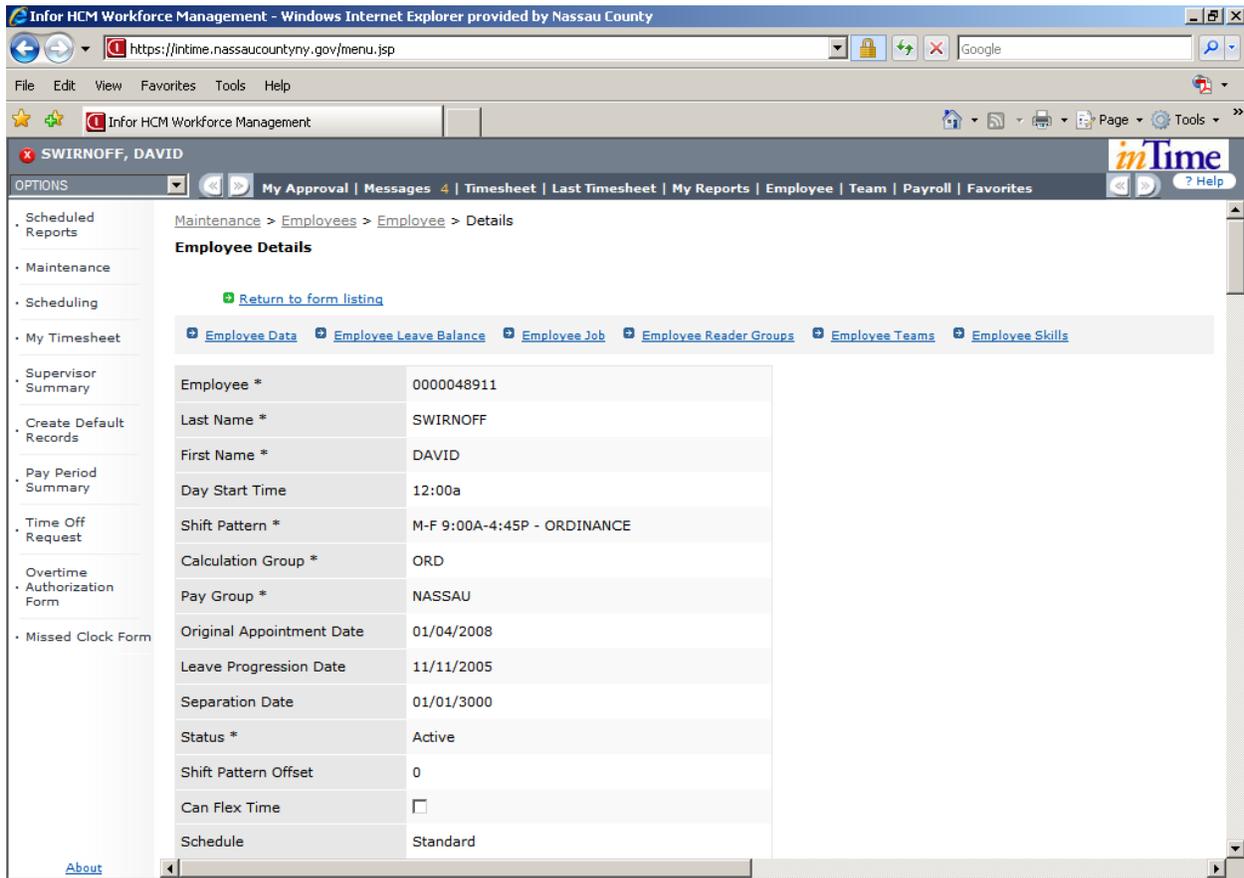
Key Information Available

You can view the following information from the Employee Details screen:

- General Employee Data including assigned Shift Pattern; Original Appointment Date; Leave Progression Date etc.
- Balances
  - Employee balances in INTIME are used to track leave balances accrued.
  - Balances are driven by NUHRS and based on union rules, labor laws and time sensitivity.
  - These leave balances will be maintained in NUHRS and interfaced to INTIME once per day.

- o INTIME will decrement balances when they are used by employees. Time codes (linked to balances) define how the balance changes when applied on the employee's Timesheet via an approved Time Off Request Form. In some departments, this is directly entered by a Timekeeper or Supervisor.
- Reader Groups: Define at which location(s) an employee may use the proximity clock.
- Employee Teams: Define which INTIME team an employee is a member of.

Navigation – Frequently Used Links
Header Bar (across top of page):
- ▪ *Messages*: displays workmail messages and forms.
- ▪ *Timesheet*: displays employee Timesheets.
- ▪ *Last Timesheet*: brings up the last displayed Timesheet.
- ▪ *My Reports*: access INTIME reports such as Employee Punches by Day, Exception Report etc.

Options Drop Down Menu
- ▪ *Hide the table of content / Show Table of Contents*
- ▪ *Go to Home Page*: To display your home page.
- ▪ *Make this my home page:* Set the current page as your home (default) page.
- ▪ *Add to Favorites*: Set the current page as a *Favorites* hyperlink.

Table of Contents (left hand side of page)
- ▪ *Maintenance*
  - • *Maintenance > Employees > Employee*
  - • *Maintenance > Employees > Employee Basic Information - Override*
  - • *Maintenance > Employees > Employee Badge*
  - • *Maintenance > Security > Users*
  - • *Maintenance > Proxy and Delegates*
  - • *Maintenance > Payroll Settings > Time Codes*
- ▪ *Pay Period Summary* (for users certifying time)

Basic Navigation Tips

Search Tips: Finding an Existing Value
A gray search bar appears at the top of tables on multiple INTIME pages. This is one option used to find existing information.

The **Magnifying Glass** icon indicates an opportunity to search and select a value from a pick list of existing options. When you click on the **Magnifying Glass** another window will open. Pop-Up blockers may interrupt this functionality.

- **Name** indicates an opportunity to search by employee name. Employee Names should be entered as their Last Name, First Name.
- Whenever you are prompted to search for an **Employee** it refers to the employee's ID number and not the employee's name.

Search Bar Example:

Notice the gray search bar appears in the window.

Click on the check boxes to select a single value or multiple values. If multiple values are not applicable to your search, the checkboxes will not appear.

Navigate through multiple pages in the picklist using **PREV** and **NEXT**

Click **Submit** to save your selection(s) *only* if you used the checkbox(es)

When selecting a single value, you can click directly on your choice instead of using the checkboxes. It doesn't matter which column you click on.

Table Tips: Sorting and Deleting
- Column headers can be used to sort the table contents in ascending (click once) or descending (click twice) order. This is a useful feature to use when a table contains many values.

Click on the column header (titles) (i.e., Team or Description in this example) to sort the table contents

- The Delete (**Del**) checkbox can be used to delete entries that were added erroneously. Entries that provide an End Date field should be end dated instead of deleted.

Mark the checkbox under the **Del** column →

Click **Save** to save the deletion

Military Time

The Military Time reference or 24-hour clock is a simple way of indicating whether a particular time is occurring at day or night. The first minute of the 24-hour clock is known as 0001 or, alternatively, 00:01. This indicates one minute past the zero hour more commonly known as midnight. The times through until 12:59 PM are shown as 00:00 through 12:59. At that point, the clock simply adds another hour to the clock. For example, 1:00 PM is referred to as 13:00 (which is simply 12:00 noon plus one hour). Alternately, you can add 12 hours to the normal clock time to determine the Military Time equivalent. For example, 2:00 PM would become 14:00. Midnight is 24:00 or zero hour and the clock starts over again. Colons are not necessary. For example, 6:00 PM (which is 18:00) may also be written as 1800. Finally, to indicate the minutes, simply add them to the end of the number as you would using Standard Time. For example, 4:45 PM is written as 1645 or 16:45.

The following conversion chart should clarify questions.

Standard Time	Military Time		Standard Time	Military Time
1:00 AM	0100 or 1:00		1:00 PM	1300 or 13:00
2:00 AM	0200 or 2:00		2:00 PM	1400 or 14:00
3:00 AM	0300 or 3:00		3:00 PM	1500 or 15:00
4:00 AM	0400 or 4:00		4:00 PM	1600 or 16:00
5:00 AM	0500 or 5:00		5:00 PM	1700 or 17:00
6:00 AM	0600 or 6:00		6:00 PM	1800 or 18:00
7:00 AM	0700 or 7:00		7:00 PM	1900 or 19:00
8:00 AM	0800 or 8:00		8:00 PM	2000 or 20:00
9:00 AM	0900 or 9:00		9:00 PM	2100 or 21:00
10:00 AM	1000 or 10:00		10:00 PM	2200 or 22:00
11:00 AM	1100 or 11:00		11:00 PM	2300 or 23:00
12:00 PM	1200 or 12:00		12:00 AM	0000

Navigating to and Using the Electronic Timesheet
The INTIME Timesheet is the primary page for entering and reviewing information related to employee work details, viewing schedules and time worked, entering overrides and exceptions and authorizing time.

You can also:
- Create timesheet default records
- View the timesheet
- Enter/Edit an employee's time (Overrides)
- Authorize/un-authorize time records (Supervisors Only)
- Submit/save changes

Key Ideas for Timesheet
- INTIME will automatically apply pay rules to the time that has been entered
- Time may be auto-authorized based on these rules
- Unauthorized time will require manual approval by a Supervisor
- Supervisor must certify time recorded at the end of the pay period via the Pay Period Summary
- Supervisor should run the Employee Punches by Day Report daily
  Note: Supervisors can use the Employee Punches by Day Report to help identify any cases of uneven clocks.

Navigating to the Timesheet Via Timesheet Selection Parameters

To bring up an Employee's Timesheet enter the employee's ID number or use the magnifying glass next to the Employee field:

If

If you select a Team on the Timesheet Selection Parameters page, you will be able to navigate between employee Timesheets:

Viewing Data on Timesheet

Navigate to:

1. Past or future timesheets
2. Different employee timesheets
3. View Applied Overrides
4. Work Details
5. Schedule
6. Employee Personal Information
7. Return to Search Parameters screen

Viewing multiple clock on/off times

Only the first two clock entries appear in the Clock On / Off fields.

To view multiple clock on /off times use the Ellipsis (…),the three dots to the right of the clock time boxes), symbol on the Timesheet. This will *usually* be used when viewing hourly employees (i.e. Part Time, Seasonal that do not have a default schedule on the timesheet) clock off / on for lunch period. As a result, hourly employees will have multiple clock on/off entries in

a given work day. To view the data, click the ellipses icon (…) to the right of the clock entries for the appropriate day.

- The Clock Entry popup window will appear showing all clock entries for the day.
- Fields displayed include Date, Time, Type and Data.
  - Date = The date of the clock entry
  - Time = The time of the clock entry
  - Type = On or Off. This indicates whether the punch was an "On" (In) punch or "Off" (Out) punch.
  - Data = This indicates whether the punch was a result of an actual swipe of a proximity card (when the Data field has a long string of characters such as "Dst=F&Online=T&Dtz=America/New_York&TZ=0") or if the punch was entered directly on the electronic timesheet (when the Data field is blank)

Viewing Schedule Information on Timesheet

Timesheet (daily)   ← 10/06/2008 - 10/12/2008 →   ↑ Page 1 of 1 ↓   → Back to Selection Screen

	Apply	🔒	Auth	Comments	Issues	Edits	Detail	Shift	Clocks	On	Off
[+]	☐		[▼]			New Edit ▼					
[+]	☐	🔓	☑	💬		New Edit ▼	10/06/2008 Mon	9:00A-4:45P - D	10/06/2008 📅		
[+]	☐	🔓	☑	💬		New Edit ▼	10/07/2008 Tue	9:00A-4:45P - D	10/07/2008 📅		
[+]	☐	🔓	☑	💬		New Edit ▼	10/08/2008 Wed	9:00A-4:45P - D	10/08/2008 📅		
[+]	☐	🔓	☑	💬		New Edit ▼	10/09/2008 Thu	9:00A-4:45P - D	10/09/2008 📅		
[+]	☐	🔓	☑	💬		New Edit ▼	10/10/2008 Fri	9:00A-4:45P - D	10/10/2008 📅		
[+]	☐	🔓	☑	💬		New Edit ▼	10/11/2008 Sat	OFF	10/11/2008 📅		
[+]	☐	🔓	☑	💬		New Edit ▼	10/12/2008 Sun	OFF	10/12/2008 📅		

Submit   ↑ Page 1 of 1 ↓   → Back to Selection Screen

Submit   → Show Applied Overrides   → View All Work Details   → Schedule   → Employee: Badger, Bobby

Note: If you click on the Schedule link near the top of the timesheet you will be able to view the employee's default Shift Pattern.

Code Summary

	UNPAID	Total
UAT	33.75	33.75
LUN-U	5.00	5.00
Total	38.75	38.75

- Schedules in INTIME consist of Shifts and Shift Patterns. A Shift consist of one day's work (Ex: 9:00am – 4:45pm). A Shift Pattern is a combination of Shifts. See glossary for further detail.
- Default Shift / Shift Patterns will be assigned to employees in INTIME (bulk loaded), excluding hourly employees (i.e. Part Time and Seasonal).
- Majority of County Employees will have fixed Shifts that will not require regular maintenance.
- Employees will be put on a standard schedule of 9:00am to 4:45pm, unless they have a different default schedule.
- Manual changes to an employee's Shift or Shift Pattern can be made on a permanent or temporary basis in INTIME.
- Some Departments (Public Works, Parks, Police and Correction) have more dynamic Shifts / Shift Patterns and will need to be monitored and updated more frequently.
- INTIME will reflect time worked in hours and fractions of hours. For example, if an employee worked a total of 33 hours and 45 minutes in a specific time period, the *Code Summary* at the bottom of the timesheet will record 33.75 hours.
- ***NOTE:*** The actual hours and minutes will be displayed for each day in the Time Code Summary details (located in the column to the right of the clock on / off boxes).
- ***NOTE:*** *For additional details on assigning shift/shift patterns, refer to the Getting Started Job Aid.*

Understanding the Time Code Summary and Code Summary

Work Details

Start Time	End Time	Hours	Rate	Time Code
9:00a	12:30p	3:30		WRK
12:30p	1:15p	0:45		LUN-U
1:15p	4:45p	3:30		WRK
4:45p	6:30p	1:45		OACOT
6:30p	6:31p	0:01		MISSED
6:31p	6:36p	0:05		LL

The Time Code Summary on the right-hand side of the timesheet totals all the time codes for the *day*.

Time Code Summary

WRK 7:00, LL 0:05, MISSED 0:01, OACOT 1:45, LUN-U 0:45

The Code Summary at the bottom left-hand side of the timesheet totals all the time codes that are being displayed on the screen. It also breaks down the codes by hour type and totals codes by hour type as seen below.

Time Code Summary

WRK 7:00, LL 0:05, MISSED 0:01, OACOT 1:45, LUN-U 0:45

WRK 7:00, GR-U 0:08, OACOT 1:45, LUN-U 0:45

WRK 7:00, GR-U 0:03, LL 0:09, OACOT 1:45, LUN-U 0:45

WRK 7:00, GR-U 0:01, OACOT 1:45, LUN-U 0:45

WRK 7:00, OACOT 1:45, LUN-U 0:45

Code Summary

	REG	OT1	UNPAID	Total
WRK	35.00	0.00	0.00	35.00
GR-U	0.00	0.00	0.20	0.20
LL	0.00	0.00	0.23	0.23
LUN-U	0.00	0.00	3.75	3.75
MISSED	0.00	0.00	0.02	0.02
OACOT	0.00	8.75	0.00	8.75
Total	35.00	8.75	4.20	47.95

Note: Scrolling to the right of the Time Code Summary will reveal the associated Hour Type Summary. See glossary for additional information.

Entering Clock On and Off Times

1. Enter Clock On / Off times directly into the On / Off box on the line of the corresponding date.
2. Time entry in Military Format
3. Click Apply and Submit! (Note: Click Submit before navigating to another screen.)

Key Points: Clock Entry
- Use *Show Applied Overrides* to view history of applied overrides.
- Click on *Ellipsis* to view additional On/Off clock entries.

Remember: INTIME will validate that employees have both ON and OFF clock times. On days where employees do NOT have both ON and OFF clock times (uneven clocks), Supervisors will be unable to authorize any of the employee's time/usage for that day. A Calculation Error (red circle with white exclamation mark) will appear on the Timesheet; clicking on the red circle with white exclamation mark will display the message *Work Summary Un-Authorized*.

It is critical to resolve uneven clocks so time can be authorized. To resolve this issue, ask your employee(s) to submit a Missed Clock Form for each instance where they did not clock ON / OFF. Once the Missed Clock Form is approved, the clock time will appear on the Timesheet and the time for the day can be authorized. For employees that have access to their own electronic Timesheet, they can enter the missing time directly onto the Timesheet along with an explanation comment. Similarly, once the time has been entered, the time for the day can be authorized.

Viewing Work Details

How Total Hours Display on Time Off Request Form v. Timesheet
When using the Time Off Request Form, if an employee requests time that includes their meal (e.g., from 9am to 1:15 or a full day), the "Total Hours" field on that form will display 0.75 hours more than the amount of time the employee actually will use. This is because the "Total Hours" field includes the 45 minute unpaid lunch. However, the employee will not be charged for that lunch period.

On the timesheet, once the request has been approved, the lunch is automatically removed and the employee will only be charged for the correct amount of time off.

Example: An employee that works a 7 hour day wants to take 1 full day off. The total hours field will display 7.75 hours on the Time Off Request Form. However, when this is applied to the timesheet the employee will only be charged the correct 7 hours of time off.

Code Overrides
Code Overrides are used to change certain time code attributes. Scenarios include: Changing a temporary OT or Standby code to the permanent time code, changing WRK for a part time employee to GR-U, updating the OTHER time code to the permanent code (UVAC etc.) once employee has accrued time etc.

New Edit Dropdown

1. Click 'New Edit' on the day for which the change applies and select "Code" in the dropdown menu; a Code Override pop-up window will appear.
2. Change the time code as appropriate in the Code Override pop-up window.
    a) You can use the lookup icon to search for the correct time code
    b) If you know the time code you can also type it in directly in the field without using the lookup icon
3. Make sure to confirm that the Start and End Times represent the appropriate fraction of a day.
4. Enter applicable comments in Override Comment field.
5. Click Submit.

OR

Work Details

- Expand the Work Details on the appropriate day by clicking on the '+' icon.
- Override the temporary time code (i.e. OT_CASH) with the appropriate permanent time code by entering it directly in the time code field in Work Details. Make sure that Start and End times correspond to the original entry.
- If you are the employee's Supervisor, click on the 'approval' box to the left of the portion of the day for which the time was worked, and then select the 'apply' box directly above it.
- Click on Submit to save your changes.

Please note that temporary time codes are NOT sent to NUHRS and must therefore be changed to the permanent time code prior to the end of the pay period

Correcting MISSED for CSEA FT
- On the Timesheet for full-time CSEA employees, there may be unauthorized MISSED time code entries that need to be corrected. If MISSED appears on the Timesheet in the work details, this indicates:
    - The employee may have not worked on a scheduled day. The employee needs to submit a Time Off Request Form.
    - The employee may have simply forgot to clock in/out. The employee needs to submit a Missed Clock Form.
- There are some scenarios where the MISSED time code is expected:
    - If there is a gap between the end of the CSEA employee's shift and the start of OT on the same day.

Shift Overrides

Shift Overrides are used to change an employee's shift (default time an employee is scheduled to work in a day e.g. 9:00a-4:45pm) for a certain date. An example is an employee who has been approved to work a 9:30a-5:15p shift instead of his / her normal 9:00a-4:45p.

New Edit Dropdown

1. Click 'New Edit' on the day for which the change applies and select "Shift" in the dropdown menu; a Shift Override pop-up window will appear.
2. Change the shift as appropriate in the Shift Override pop-up window.
    a) You can use the lookup icon to search for the correct shift
    b) If you know the exact shift you can also type it in directly in the field without using the lookup icon.
3. Use Start Date and End Date to choose the days to which to apply the shift change.
    a) Note: The shift change will apply to every day in the date range selected, including weekends and days the employee is currently scheduled to be OFF.
4. Enter applicable comments in the Override Comment field.
5. Click Submit.

Adjust Schedule Times

- If an employee's schedule needs to be adjusted for a day (i.e.: rescheduled time), you can use the selections in the **New Edit** drop-down menu on the Timesheet for Schedule.

Schedule Times (without a break) - For a schedule that does not have an unpaid lunch break,

1. Click on New Edit – Sched Times on the Timesheet.
2. Enter the Start and End time of the shift.
3. Enter applicable comments in the Override Comments field.
4. Click Submit.

Schedule Times with Breaks - For a schedule that does have a break,

1. Click on New Edit – Sched Times with Breaks on the Timesheet.
2. Enter the start / end time of the shift, override comment, the start / end time of the lunch break, time code for LUN-U (unpaid lunch), hour type of UNPAID and click Submit.

Note: This is the same process for applying Overnight Shifts with Breaks.

Key points for employee schedules
- Some Departments (Public Works, Parks, Police and Correction) have more dynamic schedules and will need to be monitored and updated more frequently.
- Manual updates / overrides to shifts by the Timekeeper or Supervisor will be required for employees who need a schedule other than the default schedule (Including new or transferred employees).
- Some employees will not have a regular default schedule (e.g., part-time or seasonal).

Copy an Override:
- Select the check box next to the copy icon to the left of the override you want to copy.
- Select the Apply check box on each day you want to copy that same override.
- Click Submit to save your changes.

To delete an override:
- Select the check box next to the trash can icon to the left of the override you want to delete.
- Click Submit to save your changes.

Use of LTA Overrides

The LTA override is important as it will apply a leave usage type (i.e., vacation, personal, sick, etc.) to an employee's schedule and take lunch into account. This saves you from making two entries: one for the morning and one for the afternoon.

Ex: Apply Vacation Override for Employees without a schedule:
- For employees without a default schedule, (i.e. part-time, seasonal) a Shift override needs to be entered manually on the electronic Timesheet (See pg. 44, 'Shift Overrides')
- Subsequently, an LTA Override needs to be made manually on the electronic Timesheet.
- On the electronic Timesheet, select the *New Edit* drop-down menu on the appropriate day and click LTA

Apply Vacation Override for Employees without a schedule:
- Use the magnifying glass to select the appropriate time code to apply (UVAC)
- Change the Start and End Date
- Enter a Start Time and End Time
- Enter applicable comments in the Override Comment field.
- Click Submit

Work late one day, leave early the next

For employees that have agreed to work late one day and leave the equivalent of that time early another day, the following entries should be made in INTIME:

1. Use the **New Edit** drop down to enter a SCHED TIMES W BREAK Override for the day the employee worked late (Ex: If the employee's shift normally ends at 4:45pm and the employee works until 6:45pm, enter Start Time equivalent to when employee started working, End Time 6:45p, Break Start Time 12:30p, Break End Time 1:15p, Break Time Code LUN-U and Break Hour Type - UNPAID)

2. Use the **New Edit** drop down to enter a SCHED TIMES W BREAK Override for the day the employee left early (Ex: If the employee's shift normally ends at 4:45pm and the employee works only until 2:45pm, enter Start Time equivalent to when employee started working, End Time 2:45p, Break Start Time 12:30p, Break End Time 1:15p, Break Time Code LUN-U and Break Hour Type - UNPAID)

3. For most employees, there is no automatic flexing when the employee arrives late to work (e.g. 7 minutes) and works the equivalent amount of time he / she was late, after the end of their scheduled shift. This means that the employee will appear as having 7 minutes of LATE time and the equivalent of 7 minutes LL (Left Late) time in this scenario. It will appear this way unless a manual correction or SCHED override is entered.

4. The one exception is Ordinance employees who will have MISSED appear on their Timesheet for any time they arrived after their scheduled start. For Ordinance employees, as long as their day / period WRK totals sum up, no override is required to correct the MISSED time code.

Approving LATE/LE (Left Early)

- If an Employee clocks in LATE (greater than 6 minutes after the start time of a shift) or LE – Left Early (any period of time earlier than the scheduled end time of a shift), these time codes will become unauthorized. These time codes need to be approved as part of the payroll close process.

- LATE and LE <u>will</u> auto increment the tardy balance.
  - The Timekeeper / Supervisor should verify that the employee was LATE or LE (Left Early) for their shift. Employee could submit a Missed Clock Form if they missed their punch and were on time.
  - If the employee was LATE or LE (Left Early), click on the 'approval' box to the left of the work detail record on the Timesheet.
  - Click on the 'Apply' box above the approval box on the corresponding day. (Supervisor Only)
  - Click Submit to save your changes.

To decrement the balance, the timekeeper should:

1. Run the balance report using the TARDY code. When someone is showing 105 minutes or more, enter a Code override on the Timesheet on the date that the 105 minutes was reached (outside the employee's shift for that day), based on the order given in the contract:
   - UVACL
   - UPERL
   - USCKL
   - UCOML

Editing an Override v. Inserting an Override

The previous instructions show how to insert an override (Code, LTA, Shift, Schedule Times etc.) by using the New Edit dropdown box. It is also possible to edit an existing override.

INTIME keeps a record of the changes or overrides entered in the system. If you are unsure whether a particular override or change has been entered / saved you can view these overrides by clicking on the '**Show Applied Overrides**' link at the top of the Timesheet. Then, scroll down to the appropriate day to view the overrides that were entered for that day.

In most cases, you will be able to edit the Timesheet and resolve any issues yourself. However, if after verifying the appropriate override entry was made and the issue is still not resolved, please contact Central HR.

Note: Avoid entering excessive overrides. In some cases, deleting extra overrides can help you resolve issues.

Work Details vs. Show Applied Overrides

- **Work Details** - provide information on how a particular day's work is structured (Ex: 9:00a-12:00p - WRK, 12:00-12:45p - LUN-U, 12:45-4:45pm- WRK). Work Details can be viewed by clicking on the (+) button next to a particular day or by clicking View Work Details link at the top of the Timesheet.

Click on the (+) to view Work Details for a particular day. Click on the (-) to collapse Work Details.

- **Show Applied Overrides** - displays Timesheet Overrides (Ex: Code Override). These are the changes / edits made to the Timesheet.

The example below shows the applied overrides for an employee taking time off.

Editing an LTA

Edit an Override:

- To edit an applied timesheet override, simply click **Edit LTA** next to the override you would like to change.

- On the LTA Override screen, you can change the Time Code, Start/End Date and Times and the Override Comment.

- Click Submit to save your changes.

Adjusting ORD using AWW

- Employee submits a Time Off Request Form for the time in which they plan to use AWW. Employee must select a Time Off Type of Vacation, Sick, Personal, etc.

- On the electronic Timesheet, the Timekeeper or Supervisor will manually override the time off type (i.e. UVAC, USCK etc.) that the employee selected with AWW once the employee has surpassed the 67.5 hour threshold. Use the Comments field to indicate that this time will be accounted for using AWW because the employee has worked extra hours in the pay period.

Note: The employee must have worked enough hours within the current pay period to allow the use of AWW (more than 67.5 hours). The process for AWW is similar for full days and partial days. For full days, ensure that the total time for AWW does not exceed a regular work day. (i.e. 6.75 hrs). Further, the total time adjusted may not exceed 13.5 hours in any one pay period.

Using and Updating 'OTHER' on timesheet
- Employees may use the Time Off type 'Other' on the Time Off Request Form for all *future-dated* requests when they currently lack the sufficient accrual balance (i.e. personal, vacation) to cover the request but anticipate they will have the sufficient balance. When using 'Other' it is required that the future leave usage time code be entered in the Comment field, with a brief explanation.
- The Time Off Type 'OTHER' would also be used in instances where there is no specific Time Off Type for the balance requested (Ex: UBRCS) When using 'Other' it is required to indicate the specific time off type in the Comment field.
- On the Timesheet, click 'Show Applied Overrides' to review the comment indicating the type of usage that should be applied. Clicking 'Show Applied Overrides' will display *all* overrides for the date period selected on the Timesheet. You will need to scroll down to find the appropriate date. Remember that each row corresponds to one day.
    1. Click on the 'Show Applied Overrides' link at the top of the Timesheet.
    2. Click 'Edit LTA' on the day for which the change applies; an LTA Override pop-up window will appear.
    3. Change the time code as appropriate in the LTA Override pop-up window (Ex: Change time code from OTHER to UPER)
        a) You can use the lookup icon to search for the correct time code
        b) If you know the time code you can also type it in directly in the field without using the lookup icon
    4. Make sure to confirm that the Start and End Times represent the appropriate fraction of a day.
    5. Enter applicable comment in Override Comment field.
    6. Click Submit.

How to delete overrides
1. Click 'Show Applied Overrides' to view Overrides.
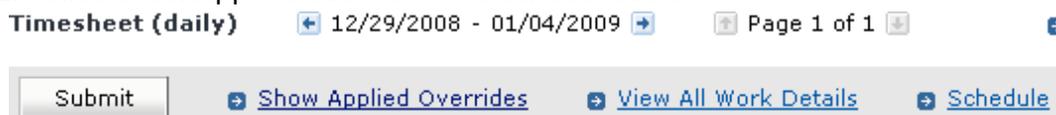
2. Click on the checkbox directly to the right of the Trash Can icon that applies to the Override you want to delete.

3. Click on 'Apply' and 'Submit' to Save your changes on the Timesheet.

NOTE: When deleting overrides, you must be careful as you have the ability, for example, to delete a time off request that was approved, without the employee submitting a request to cancel. **It is possible to remove these leave requests in error.**

Adjusting Lunch Break
- If an employee submits a request for a partial day off, the applied override may overlap the lunch. The supervisor will need to adjust the lunch break on the Timesheet.
    1. Expand the Work Details on the Timesheet (+) to review the record.
    2. Enter in the correct Start and End Time of the lunch break.
        a) Lunch break needs to be either 45 minutes or 60 minutes, depending on the employee's pay policy.
    3. Click on the **'apply'** checkbox on the day of the change.
    4. Click Submit to save your changes.

.

Changing OT Temp Code to Permanent Code
After OT Authorization Forms are approved, a temporary OT time code of OT_CASH, OT_COMP or OT_CASH_OVERRIDE will be applied to the Timesheet indicating the type of OT compensation the employee has requested. Follow the steps below to change the temporary OT time code to the permanent OT time code:
1. Temporary OT codes will be flagged with a calculation error on the timesheet.
2. Expand the Work Details on the appropriate day by clicking on the '+' icon to view the original approved OT time range.
3. Override the temporary OT time code with the appropriate permanent OT time code by entering it directly in the time code field in Work Details. Make sure that Start and End times correspond to the actual OT worked.
    - Replace OT_CASH with OACOT
    - Replace OT_COMP with AOTCP

- Replace OT_CASH_OVERRIDE with OTOTL

4. If you use the docket field to track a particular type of OT for reporting purposes, you must select the appropriate code from the drop down menu. Note that the use of the docket field does not affect the actual payment of the OT. It is strictly used for generating reports in INTIME.
5. Click on the 'approval' box to the left of the portion of the day for which the OT was worked, and then click on the 'apply' box directly above it.
6. Click on Submit to save your changes.

Please note: Temporary OT codes are NOT sent to NUHRS and must therefore be changed to the permanent Time Code prior to the end of the pay period. If they are not changed, employees will not be paid their Overtime nor receive their accrual for COMP time. NOTE: OT worked on an employee's day off will require a manual entry for Meal Money where applicable.

OT on Shifts that Span Days (i.e.: overnight shifts)

1. Employee submits the OT Authorization Form with appropriate OT type.
2. Once the OT Authorization Form is approved, a Left Late (LL) Time Code will appear on the Timesheet on the day the shift started. A temporary OT Time Code (Ex: OT_CASH) will be applied to the second day when the associated shift spans days.
3. If the OT is continuous with the employee's shift, the employee should clock out after the end of their OT.
4. The Timekeeper or Supervisor will need to override the Left Late (LL) Time Code on the Timesheet with the permanent OT Time Code (EX: OACOT, OANOT).
5. The Timekeeper should delete the OT override (EX: OT_CASH) generated by the OT Authorization Form on the second day to ensure the employee is paid correctly.

Note: If these adjustments above are not made to the employee's Timesheet, the employee will get paid more than the amount of actual OT worked.

Meal Money
INTIME is configured such that Meal Money is triggered automatically when the following conditions are met:
- The employee has worked 2 hours before or after their scheduled Shift
- The employee has worked their full scheduled Shift
- The work is contiguous with the employee's work schedule (no break at all is allowed).

When employee arrives late and leaves late for OT shift

To update Overtime when an employee started after the scheduled start of their OT and stays that equivalent past the scheduled end of their OT the following adjustment will be required in INTIME:

- Open the Work Details by clicking on the '+' button next to the day the employee worked the OT.
- After verifying the employee worked the appropriate OT, override the temporary OT time code with the permanent OT time code.
- Change the Start Time and End Time to denote when the employee actually arrived for their OT and when they finished. For example, if an employee was scheduled to work OT from 8-10pm but came in at 8:10pm and worked until 10:10pm, change the Start Time to 8:10pm and End Time to 10:10pm.
- Click Apply and Submit.
- If the scheduled OT is non-contiguous with the employee's scheduled Shift, a MISSED time code will appear from 8:00-8:10pm. If however, the OT falls on a holiday where the employee was not scheduled to work or the time is contiguous with the Shift, no MISSED time code will appear.

Override pending standby time code
New Edit Dropdown
1. Click 'New Edit' on the day for which the change applies and select "Code" in the dropdown menu; a Code Override pop-up window will appear.
2. Change the time code as appropriate in the Code Override pop-up window (Ex: Change time code from STNDBY_CASH to DSTBY)
   a) You can use the lookup icon to search for the correct time code
   b) If you know the time code you can also type it directly in the field without using the lookup icon
3. Make sure to confirm that the Start and End Times represent the appropriate fraction of a day.
4. Click Submit.

OR

Work Details
- Expand the Work Details on the appropriate day by clicking on the '+' icon to view the originally requested Standby time range.
- Override the temporary Standby time code (STNDBY_CASH) with the appropriate permanent Standby time code (DSTBY) by entering it directly in the time code field in Work Details. Make sure that Start and End times correspond to the original request.
- Click on the 'approval' box to the left of the portion of the day for which the Standby was worked, and then click the 'apply' box directly above it.

- Click on Submit to save your changes.
- **Please note that *temporary* Standby time codes are *not* sent to NUHRS and must therefore be changed to the permanent Time Code prior to the end of the pay period.**

Premium Override

In some cases (such as for part time employees who have no schedule in INTIME) a premium such as shift differentials or meal money may need to be manually added to the Timesheet by the Timekeeper or Supervisor.

To add a Premium manually,
1. Select New Edit – *Premium* on the Timesheet on the day which the Premium applies.
2. In the Premium Override pop-up window, enter the appropriate Premium time code (i.e. DHGR1 for Group 1 or DHGR2 for group 2).
3. Enter the hours or fractions of hours the employee is eligible for the Premium.
   Note: The hours must be entered in hours and fraction of hours, not in minutes, and can only be entered for quarter hour increments. Example 1: An employee worked 6 hours and 15 minutes. A total of 6.25 hours should be entered for the premium. Use the following guide to enter the quarter hour increments in fractions of hours:
   - 15 minutes = .25 hours
   - 30 minutes = .50 hours
   - 45 minutes = .75 hours
4. Click Submit.

Note: Two Time Codes should always appear on the Timesheet for Premiums. First, a Time Code should be listed in the Work Details for the hours worked in that day, such as WRK, USCK etc. After applying the Premium edit, a second Time Code in yellow should appear for the Premium.

How to save transactions to the timesheet (apply & submit)

After entering the override / edit on the Timesheet, two steps are required to save the change to the Timesheet:

(1) Click 'Apply' next to the day corresponding to the change:

(2) Click 'Submit' to Save your change:

Entering and viewing comments

Comments are used in the system to highlight additional information. For example, an employee using the 'OTHER' Time Off Type will need to highlight in the Comments section of the Request Form what balance accrual he / she expects to use for this time. Once the form is approved, the Timekeeper / Supervisor will then be able to see the comment on the Timesheet. To insert a new Comment directly onto the Timesheet use the Comments icon below:

A text box will appear. Enter your comments and click OK.
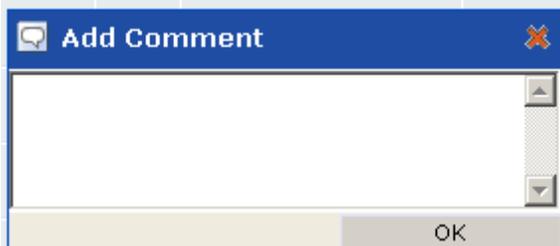
To view existing Comments click on Show Applied Overrides, scrolling down to the appropriate day.

Key Timekeeper Activities

INTIME Activities: Timekeeper

INTIME Activities per Pay Period		Run & Review Reports	Perform Time Administration	Support Employees
	Daily	**Unauthorized Records Report** Provides an at-a-glance summary of unauthorized time for an employee's work day. **Employee Punches by Day Report** Used to help flag employees that are consistently missing their punches.		
	As Needed	**Attendance Report** Identifies employees that have not clocked on at the start of a shift. **Time Code by Employee Report** Lists time worked by each employee by Time Code. **Overtime Report** Displays the number and type of overtime worked by employees.	**Review Timesheet Entries** **Edit Timesheet Entries**	**Timesheet Entries** **Time and Leave Request Forms** **OT Authorization Forms** **Missed Clock Forms**

Notes:
- Timekeepers are not authorized to approve time or INTIME forms.
- Time entries and edits made by Timekeepers will require Supervisor approval in INTIME.
- Some follow up may be needed for specific time entries that needs additional, required paperwork (Ex: Jury Duty).
- Timekeepers without access to NUHRS will need to coordinate with the appropriate individual with NUHRS access.
- Payroll Export will be run bi-weekly.

Shifts

| Change **Shift** | → | **Timesheet** | → | **New Edit** select **Shift** | → | Enter **Start/End Date** | → | Click **Submit** to close **Shift Override** window | → | Click **Submit** on **Timesheet** |

Notes:
• Entering a **Shift** override on the **Timesheet** is very similar to entering a new **Time Code** override.

Shift Patterns
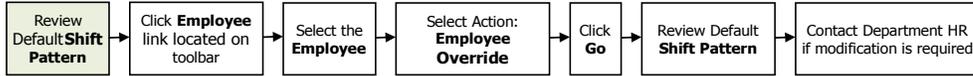
| Review Default **Shift Pattern** | → | Click **Employee** link located on toolbar | → | Select the **Employee** | → | Select Action: **Employee Override** | → | Click **Go** | → | Review Default **Shift Pattern** | → | Contact Department HR if modification is required |

Delete and Copy Overrides

| Delete/Copy **Override** | → | **Timesheet** | → | Click **Show Applied Overrides** | → | 🗑 ☐ ⧉ ☐ | → | • Click the **Trash Can** checkbox to delete a shift • Click the **Paper** checkbox to copy a shift | → | Select **Apply** checkbox for select dates (Used only for Copy) | → | Click **Submit** |

Notes:
• The ability to delete/copy is also available in the **Work Details** using slightly different icons displayed as a **Trash Can** and a **Star** 🗑 ❄.
• Changes made to the **Work Details** do not require the Apply checkbox to be selected.

Workmail Activities

| Review Messages | → | Click **Messages** | → | Click **Inbox** | → | Review message status ✉ Unread ✉ Read | → | Click employee in **From** |
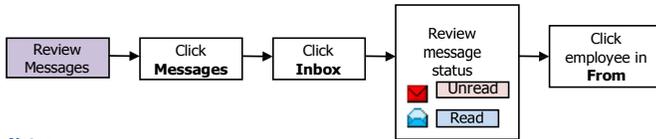
Notes:
• Timekeepers will be able to submit their own requests / forms using Workmail functionality.
• Workmail should only be used to communicate messages related to Time and Leave.

4

SUPERVISORS

Proxies and delegates
- An INTIME **Proxy** can perform all time and leave activities on behalf of another user based on the time period defined by the original requestor. Proxies can view both *past* and *future* requests and can make any changes during the time he / she is acting as proxy.
    - *You can assign more than one proxy, if necessary.*
    - *Only the Supervisor can assign his / her own proxy.*
    - *A proxy must be another user at your level or higher (i.e. another Supervisor)*
    - *Supervisors cannot proxy down (i.e. Timekeeper)*
    - *A Department Head may proxy down to his / her Deputy.*
    - *Supervisors must communicate the duration of the responsibility, as INTIME will not automatically notify nor remind the Proxy of the added responsibility.*
- An INTIME **Delegate** is limited to act on Interactions (Time Off Requests, OT Authorization Form, Missed Clock Form). As a Delegate, all INTIME Interactions automatically route to your INTIME Workmail Inbox. Delegates can only process requests after they have been granted delegate access.
    - *Only one Delegate can be assigned per Interaction (Form).*

Assigning a Proxy / Delegate
- Navigate to: **Maintenance > Proxy and Delegates > Users Who Can Become Me**
- Click the **Create New Entry** link
- Enter the **Start Date** to indicate the first date the user can act on your behalf
- Enter the **End Date** to indicate the last date the designated user can act on your behalf
- Use the lookup icon in the **To This User** field to select the user who will act on your behalf
- Optional: Use the Comment field to enter any relevant information.
- Enter Proxy/Delegate in the **Delegation Type** field.
- Verify that **ALL** is populated in the For Interactions field. If assigning a Delegate, use the lookup icon to select the appropriate interaction form.
- Click the **Save** button
- Verify that the following message appears in the top left corner of the screen: '**Your changes have been saved'**

Acting on Behalf of Another User
- **Navigate to: Maintenance > Proxy and Delegates > Become Another User**
- From the dropdown select the user you would like to become
- Click **Become**

Note: You will see the Employee ID number of the original Supervisor displayed in green text on the screen when you are logged in as him / her.

Monitoring Requests
- Messages should be checked at least once daily to ensure that the requesting employee is receiving responses in a timely manner
- If there is a request that you want to put aside until a later date, place the request in a "pending" status where it will stay until you take action on it. This also will send a message to the employee informing him/her that that you have looked at the request and have placed it in a pending status for later review.
- If you have several request forms in your Inbox, You can use the "Batch Approvals" function to act on multiple requests at one time. (See Batch Approval section)
- The Year at a Glance and Daily Attendance reports can also be used to review employee absences.

Authorize time on the Timesheet

After reviewing the Work Details and saving your changes on the appropriate day, click Authorize, Apply and Submit to approve the entire day's work.

Note: You can also approve individual work details by clicking on the '+' button and viewing those work details. Once the time has been approved on the Timesheet, it does NOT need to be reapproved on the Pay Period Summary. The time will appear with a 'Y' in the authorized column of the Pay Period Summary.

Some time is auto-authorized, including pre-approved leave.

Remember: INTIME will validate that employees have both ON and OFF clock times. On days where employees do NOT have both ON and OFF clock times (uneven clocks), Supervisors will be unable to authorize any of the employee's time/usage for that day. A Calculation Error (red circle with white exclamation point) will appear on the Timesheet; clicking on the error details will display the message *Work Summary Un-Authorized*.

It is critical to resolve uneven clocks so time can be authorized. To resolve this issue, ask your employees to submit a Missed Clock Form for each instance where they did not clock ON / OFF.

Once the Missed Clock Form is approved, the clock time will appear on the Timesheet and the time for the day can be authorized. For employees that have access to their own electronic Timesheet, they can enter the missing time directly onto the Timesheet along with an explanation comment. Similarly, once the time has been entered, the time for the day can be authorized.

Un-Authorize time on the Timesheet

Similar to the process for authorizing time, click Authorize and then Submit to un-approve an entire day's work. Make sure the Auth checkbox is unchecked:

Note: You can also un-approve individual work details by clicking on the '+' button and viewing those individual work details. Click the Approval checkbox to uncheck. Click Apply, then Submit. This time will appear with an 'N' in the authorized column of the Pay Period Summary.

Payroll Closeout
1. Supervisor or Timekeeper runs the Unauthorized Records Report for the previous pay period.
2. Supervisor or Timekeeper investigates each Unauthorized (UAT) record on the employee's Timesheet.
3. Supervisor or Timekeeper corrects the UAT records and where necessary makes appropriate edits. If no edits are necessary click Approve and Submit.
4. Supervisor runs the Pay Period Summary to submit and certify time entries.
5. Payroll exported to NUHRS

The Pay Period Summary is to be reviewed and approved for the *previous* pay period by 5pm the night the payroll is closing. The INTIME payroll closes the Monday after the end of the pay period _unless otherwise notified_.

For pay periods in which the Monday following the end of a pay period is a County holiday, the pay period closes Friday at 5pm. These dates are subject to change at the direction of the Comptroller's office.

Pay Period Summary (search parameters)
1. Log into the main INTIME Application
2. On the right hand side, in the Table of Contents, click on **Pay Period Summary**
3. Enter a **Pay Group** of 'NASSAU'
4. Select the Pay Period (Ex: Current Pay Period) in the **Pay Period Selection** field or enter a manual range.
5. Enter the **Team** you supervise on the Search Parameter Page (Note: To run the Pay Period Summary for the entire department, enter the root Team (Ex: IT is a root Team; Sub Teams could include IT_001, IT_002 etc.) and click the Sub Teams checkbox.
6. Click **Go** to generate the Pay Period Summary based on the criteria selected
   - Note: Since the Pay Period Summary is On Demand, it will be 'view only' and cannot be downloaded to PDF or Excel. Scroll down to the bottom of the page to view the report.

Certify Time - Pay Period Summary
- See above 'Pay Period Summary' to access report.
- You will now see the Pay Period Summary Report. The information contained on this report is the same as on the Timesheet, but it has been summarized.
- Expected Results:
- You'll see each time code in a given week with the number of hours with a decimal fraction noted. Plus you'll see the total time for that week (this will be in excess of 35 hours as it includes all lunch time as well as other Time Codes)
- Review the 'Authorized' column to confirm all items are 'Y' (approved). If there are any 'N' (not approved) see Payroll Closeout – Correcting Errors on the next page.
- After review is completed to satisfaction, click the Certify checkbox next to **each** of your employees.
- Note: It is possible to certify an employee's time even if the Supervisor has determined it cannot be approved before the pay period closes (i.e. employee failed to clock in / out for a given day(s) within the pay period and he / she is not at work before the pay period closes). If Timesheet is Approved after pay period closes go back into the Pay Period Summary and re-certify.
- Click Submit.

- Note: The approved time has now been certified and will be sent to NUHRS during the next payroll export.

Pay Period Summary Report
- When selecting ALL employees on the Pay Period Summary Report, Supervisors will also see themselves (though a supervisor cannot approve his/her own time). If you select TEAM and not ALL EMPLOYEES, you will not see yourself on this report.
- When printing the Pay Period Summary, an 'N' will display in the authorized column, at the bottom of each employee's total. This occurs even when all rows are authorized and displaying with a Y in the authorized column.
- Be proactive with your time approval; it is to your advantage not to wait until the end of the pay period to approve.
- Filters on the Pay Period Summary allow you to pull up only certain records. One that may be particular helpful is to run the Pay Period Summary for Unauthorized Records. You can do this by using the *Authorization* field and selecting '**Weekly Timesheet Unauthorized Records**.'
- The Pay Period Summary should not display any duplicate records

Payroll Closeout – Finding Errors
Run the **Exception Report** to quickly identify areas on the Timesheet that require review:
- This report will show you all instances where someone has a code OTHER, OT_CASH and OT_COMP. These codes must be replaced with the correct code.
- You can also use this report to identify LATE, LE, and MISSED. If you need to change LATE or LE (Left Early) to account for an employee working through lunch, the employee's schedule should be adjusted on the electronic Timesheet for that day. MISSED can be an indication if a full-time CSEA employee failed to clock in/out during a day.
- The report displays a link (i.e. Details) to the employee's Timesheet for that day. From the Timesheet, you can view additional work details and/or authorize records
- Run the **Time Code by Team** report to identify employees who have usages for the pay period that may need review (i.e. LATE, LE, MISSED, USCK, UPER, UAWP (No Pay)).
- **UCOMP**: Review any value that is not a multiple of 0.25 (15 minutes). You should not see any time for UCOMP that is not equivalent to a multiple of ¼ of an hour or 0.25 total hours, since COMP time must be used in 15 minute increments.
- **Other Codes**: Review any value that is not a multiple of ¼ of a day. Use the conversion chart on the Supervisor Quick Reference Guide to identify if there is an error in the calculation.

Payroll Closeout – Correcting Errors

Once you have identified the errors, go to the employee's Timesheet and review the specific day for which you have found an error.

- Open up the work details by clicking on the '+' sign to the far left. Corrections can be made directly on the Work Detail or through the New Edit.
- Click the link at the top of the screen indicating Show Applied Overrides to view and review previous overrides.
- Make the appropriate adjustments to the Timesheet.
- Make sure to Approve (Authorize), Apply and Submit to save your changes!
- The red circles with exclamation marks are not necessarily errors. For example entries of LATE and LE (Left Early) are not necessarily errors and may not need to be corrected.
- You may check on the "approval" box to the left, the "apply" box above that, click Submit and the red circles should disappear.

Batch Approvals

If there are several Forms that are waiting for approval, Batch Approvals can be used to expedite the process.

1. Click "Messages"
2. Click "Batch Approvals"
3. Click the "Interactions" dropdown list and select the type of forms you want to approve. i.e. Missed Clock Form, OT Authorization Form, Time Off Request Form
4. Click "Nodes". For Time Off Requests, select "RoleGroup RejectionExpire". For Missed Clock Forms, select "RoleGroup". For OT Authorization Requests, select "RoleGroup".
5. To approve, reject all or place in pending, click the "Approve", "Reject" or "Pending" radio button under the "Select All" heading.
6. To Approve some, Reject some or place some in Pending click "Reject", "Approve" or "Pending" next to the appropriate request.
7. Click "Submit"

Note: To view a particular form, click on the ellipses (…) over to the far right, along the appropriate line.

Retroactive adjustments

Assuming the user has the ability to make the retroactive change (any change made to a prior pay period), it can be done in the following way:

- **Use the electronic Timesheet**. On the Timesheet Search Parameters page, you can select past dates by either:
  - Using the Date Selection dropdown to select 'Last Pay Period' OR select 'Manual Date Range' (and enter Start and End Dates) to bring up the dates for which the change / approval applies.

- Once all the Search Parameters have been entered, click *Go* to bring up the employee's Timesheet.
- Follow same procedure as detailed in the 'Payroll Closeout – Correcting Errors' section to make retroactive adjustments.
- Once you authorize time on the electronic Timesheet, you will need to re-certify the Pay Period Summary by selecting the employee and the appropriate pay period (in which the retroactive adjustment was made).

- **Users must authorize time on the Timesheet prior to certifying the payroll.**

- After you have reviewed your employees' time and authorized it, the final step is to certify the payroll by clicking **Submit** at the bottom of the report.
  - After the payroll has been certified, users will be able to see the Certification Date (in YYYYMMDD HH:MM:SS format) and User Name (NUHRS ID) in the override details on the employee's Timesheet. The certification will appear as a work summary override with a question mark (?). To view the override, bring up the employee's Timesheet for the appropriate date and click on the **Show Applied Overrides** link.

Notes:
- Users do not need to recalculate the Timesheet after certification. However, if there is a change and the Timesheet is recalculated after certification, the override will appear as a plus sign (+) instead of a question mark; it will NOT be removed.

Payroll Export Deadline
- The INTIME Payroll Export will run <u>biweekly</u>, generally on Mondays following the end of the pay period (unless Monday is holiday, in which case the Payroll Export will run Friday, 5pm). This means that time and leave must be entered and approved in INTIME before Monday, 5pm. Any changes or approvals that are not entered by the 5pm deadline on that day will not be processed in the Payroll Export to NUHRS.

Key Supervisor Activities

INTIME Activities: Supervisor

	Run & Review Reports	Perform Time Administration	Manage Workmail	Edit Employee Record
Daily	**Unauthorized Records Report** Provides an at-a-glance summary of unauthorized time for an employee's work day. This may be assigned to the Timekeeper. **Employee Punches by Day Report** Used to help flag employees that are consistently missing their punches. This may be assigned to the Timekeeper.		**Check Inbox for New Mail Messages** **Check Inbox for New Forms**	
Per Pay Period		**Review Time Using the Pay Period Summary** **Edit Timesheet Entries** This may be assigned to the Timekeeper. **Certify Time Using the Pay Period Summary**		
As Needed	**Attendance Report** Identify employees that have not clocked on at the start of a shift. **Time Code by Employee Report** Lists time worked by each employee by Time Code. **Overtime Report** Displays the number and type of Overtime worked by employees	**Administer Proxy & Delegate** Notes: • Workmail should only be used to communicate messages related to Time and Leave. • Payroll Export is a biweekly process.	**Take Action on Forms** Approve / Process, Reject or place form(s) in Pending Status **Reply to Workmail Messages**	**Edit Shifts / Shift Patterns**

INTIME Activities per Pay Period

*in*Time

Workmail Activities

Review Messages → Click **Messages** → Click **Inbox** → Review message status | Unread | Read → Click employee in **From** Column

Requests and Forms → Click **Messages** → Click **Inbox** → Identify **Forms** → Click employee in **From** Column → Select **Approve / Process**, **Reject** or

Notes:
• Employees automatically receive notification when action is taken on a request/form
• If a Request/Form is approved, the employee's time is updated accordingly

Shift Patterns

Review Default **Shift Pattern** → Click **Employee** link located on toolbar → Select the **Employee** → Select Action: **Employee Override** → Click **Go** → Review Default **Shift Pattern** → Contact Department HR if modification is required

Shifts

Change **Shift** → **Timesheet** → **New Edit** select **Shift** → Enter **Start/End Date** → Click **Submit** to close **Shift Override** window → Click **Submit** on **Timesheet**

Notes:
• Entering a **Shift** override on the **Timesheet** is very similar to entering a new **Time Code** override.
• Supervisors can access an employee's **Timesheet** using two options:
   • Go to the **Timesheet** link
   • Click on the **Pay Period** or **Week** link from the **Pay Period Summary** page

Delete and Copy Overrides

Delete/Copy **Override** → **Timesheet** → Click **Show Applied Overrides** → [icons] → • Click the **Trash Can** checkbox to delete a shift • Click the **Paper** checkbox to copy a shift → Select **Apply** checkbox for select dates (Used only → Click **Submit**

Notes:
• The ability to delete/copy is also available in the **Work Details** using slightly different icons displayed as a **Trash Can** and a **Star**.
• Changes made to the **Work Details** do not require the Apply checkbox to be selected.

Proxy and Delegates

Assign **Delegate** or **Proxy** → Click on **Maintenance** → Select **Proxy and Delegates** → Select **Users Who Can Become Me**

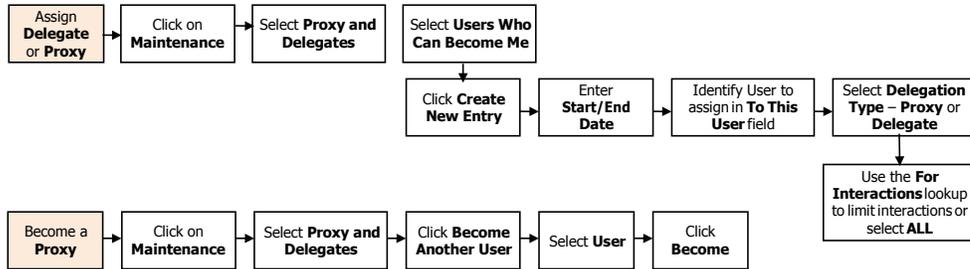Click **Create New Entry** → Enter **Start/End Date** → Identify User to assign in **To This User** field → Select **Delegation Type** – **Proxy** or **Delegate**

Use the **For Interactions** lookup to limit interactions or select **ALL**

Become a **Proxy** → Click on **Maintenance** → Select **Proxy and Delegates** → Click **Become Another User** → Select **User** → Click **Become**

Notes:
• A **Proxy** can perform all time and leave activities on behalf of another user based on the time period defined by the original requestor. To **Become a Proxy**, log into INTIME using your own User Name and Password. After acting as a **Proxy** return to your own account by clicking on your **Employee ID** at the top left of the screen. Supervisors must communicate the duration of the responsibility. Proxies can view both *past* and *future* requests and make any changes during the time he / she is acting as proxy.
• A **Delegate** is limited to act on Interactions (Time Off Request, OT Authorization and Missed Clock Forms) . As a **Delegate**, all INTIME Interactions automatically route to your INTIME Workmail Inbox. Delegates can only process requests after they have been granted delegate access.

Part-Time Employees

Process for PT Employees to Submit Time Off Request Form

For Part Time employees who do not have a schedule in INTIME, they will have to handle time off requests differently than full time employees. Time Off Request Forms *cannot* be submitted unless the employee has a schedule for the day(s) the employee is requesting off. This can be handled in two ways.

1. The Part Time Employee should submit a paper time off request form to his/her supervisor. Then, the supervisor must manually override the employee's timecode directly on the timesheet, with the appropriate time off code.

OR

1. The employee communicates to his/her supervisor the date(s) he/she would like to take off (either verbally or written).
2. The supervisor adds a schedule onto the employee's electronic Timesheet (via a Schedule override) for those dates and communicates to the employee that he/she should now submit a Time Off Request Form.
3. The employee submits a Time Off Request Form for the appropriate dates.
4. The Supervisor approves the Time Off Request Form and the time off is applied to the timesheet.

Note: if an employee is using the Time Off Request Form, he/she would need to use the correct leave code (Vacation – PT, Sick – PT, etc.) If a part-time employee attempted to use a full-time leave code, the system would give them an error and would not forward the request to the supervisor.

Further, part-time employees do not need to use their leave time in ¼ day increments. They may use leave time in 15 minute increments.

Setting shifts for part-time employees

If you have a part-time employee who works a regular schedule, you may establish that schedule in INTIME by the following steps:

1. Write down the employee's schedule
2. Identify the name of the Shift. See 'Shift Override' section for further details.
3. Go to the pay period on which you'd like to start the new schedule
4. Select the day you want to create a Shift
5. Select New Edit and then select Shift
6. Type in the name of the Shift
7. Hit Submit
8. Repeat above steps for all days the person is scheduled to work in that pay period
9. Navigate to the next pay period

10. Hit SCHEDULE (it's a link near the top of the page)
11. Click the button marked "COPY PREVIOUS PERIOD" (located in the box on the left hand side)
12. Click Submit
13. Click "DAILY TIMESHEET"
14. You should now see the shifts you have assigned for the previous pay period on the next pay period.
15. Repeat steps 9-12 for as far out as necessary

PT Employees That Do Not Have a Default Schedule
- Since part-time employees are paid to the punch, Timekeepers / Supervisors need to monitor the total time worked per pay period for part-time employees, as this time may exceed the number of hours the employee was scheduled to work during the pay period.
- To correct **excess** time recorded on the Timesheet, in the case where the PT employee arrives to WRK before the beginning of their Shift or Left Late (LL), that fraction of time shown as WRK must be changed to GR-U (Grace – Unpaid) or Left Late (LL) – Unpaid.
  1. Click on the '+' icon next to the day that requires adjustment to expand the work details.
  2. Click on 'Add Work Details'.
  3. Enter the appropriate Start and End time and the corresponding time code of GR-U or LL. (For example: If a PT employee clocked in at 8:55am but actually starts work at 9:00am, you will make an entry of time code GR-U, Start Time of 8:55a and End Time of 9:00a)
  4. Select the 'Apply' and 'Approve' checkboxes above the work detail records for the day.
  5. Click on 'Submit' to save your changes.
  6. Part Time employees must clock in / out for lunch (4 punches for the day). The lunch time may also have to be adjusted to correspond with the appropriate fraction of hour (i.e. lunch that should be 45 minutes from 12:30p-1:15p, but clocked out for lunch at 12:40p, adjust Start Time to be 12:30p)
  7. Select Apply and Approve.
  8. Click on Submit to save changes.

  Note: Part Time employees' maximum work schedule per pay period should not exceed 15 minutes less than 50% of a normal Full Time pay period (i.e. CSEA PT employee hours for a pay period should not exceed 34 ¾ hours which is equal to 15 minutes less than 50% of 70 hours)
  Part Time Employees will have to complete a Missed Clock Form if they forget to clock out / in for lunch.

Part-Time Employee - Shift Differential
Correcting Part Time employee information is critical to ensure these employees are paid correctly.

For Part-time Employees who do not have a default schedule in INTIME, a Shift Differential is NOT applied automatically to their Timesheet.

To add a Shift Differential manually,
1. Select New Edit – *Premium* on the Timesheet on the day which the Premium applies.
2. In the Premium Override pop-up window, enter the appropriate Shift Differential time code (DHGR1 for Group 1 or DHGR2 for Group 2).
3. Enter the hours or fractions of hours the employee is eligible for Shift Differential.
   Note: The hours must be entered in hours and fraction of hours, not in minutes, and can only be entered for quarter hour increments. Example 1: An employee worked 6 hours and 15 minutes. A total of 6.25 hours should be entered for Shift Differential.
4. Use the guide below to enter the quarter hour increments in fractions of hours.
5. Click on Submit on the Premium look-up screen, and then click on Apply and Submit on the Timesheet to save your changes.

   - 15 minutes = .25 hours
   - 30 minutes = .50 hours
   - 45 minutes = .75 hours

Note: Two time codes should always appear on the Timesheet for Shift Differential. First, a Time Code should be listed in the Work Details for the hours worked in that day, such as WRK, USCK, etc. After applying the Premium edit, a second Time Code in yellow should appear of DHGR1 or DHGR2 for the Shift Differential.

Remember: INTIME will validate that employees have both ON and OFF clock times. On days where employees do NOT have both ON and OFF clock times (uneven clocks), Supervisors will be unable to authorize any of the employee's time/usage for that day. A Calculation Error (red circle with white exclamation mark) will appear on the Timesheet; clicking on the error details will display the message *Work Summary Un-Authorized*.

It is critical to resolve uneven clocks so time can be authorized. To resolve this issue, ask your employees to submit a Missed Clock Form for each instance where they did not clock ON / OFF. Once the Missed Clock Form is approved, the clock time will appear on the Timesheet and the time for the day can be authorized. For employees that have access to their own electronic Timesheet, they can enter the missing time directly onto the Timesheet along with an explanation comment. Similarly, once the time has been entered, the time for the day can be authorized.

Human Resources Representatives

Payroll Export

Once the Supervisor completes the work of authorizing time, HR will begin the payroll export process.

1. INTIME payroll export file is created and sent to NUHRS.
2. NUHRS validates the records.
3. Valid records are placed into a 'Pending Pay' status (only these are eligible to be paid). Rejected records are placed into a "Suspension" status and are visible on the SUSF screen.
4. Valid time records are reviewed by Comptroller's Office (current process) and released for payment as appropriate.

Notes:
- After the payroll export runs, all department's HR/Payroll reps must review the SUSF screen and check for rejected batches.
- Check the INTIME timesheets for appropriate time off types and increments.
- If edits are required, the entry is to be made in NUHRS to reflect the correct usage (Ensure that it corresponds to the INTIME Timehseet)
- In INTIME, **DO NOT CHANGE THE VALUE** (this would cause a retroactive adjustment to be passed from NUHRS which would cause an additional reject), but enter a comment into the 'Comment' field indicating what the correction was that was placed in NUHRS.

Team validation

There may be some scenarios (Ex: Forms being routed incorrectly) where you may need to validate or update an employee's **Team.** To do this, follow the steps below:

1. Navigate to: *Maintenance > Employees > Employee*
2. Enter search criteria in the top fields to find a specific employee, e.g., an employee's last name. Click on Find to view your results. Click on **Edit** to the left of the employee's name to select a particular employee.
3. Use the **Employee Teams** hyperlink at the top of the page to quickly navigate to this section of the employee's record.
4. Review the assigned team for accuracy. To confirm Team Name is correct, click on Lookup icon, type in Team Name, click Find and the Description (Supervisor's Name) will be listed as associated with that Team Name. If the assigned Team value is not current, click on the **lookup** icon to search for the appropriate team. Select the appropriate Team.
5. Enter the **Start Date** for which the Team should be effective for the employee and select the **Home Team** checkbox to assign a permanent Team. (Remember – an Employee can only be assigned to one Home Team.)

6. Click on **Save** at the bottom of the Employee Team section. Remember to confirm the system-generated note at the top of the page, 'Your changes have been saved' to ensure your changes have been recorded.

Updating badge info

There may be some scenarios (i.e. a new employee starts work, an existing employee receives error when swiping proximity card) when you will need to validate or add new badge information. Follow the steps below to add or update **Proximity Badge** information:

1. Navigate to: *Maintenance > Employees > Employee Badge*
2. Click *Create New Entry*
3. Type in the Employee ID or use the Employee lookup icon to search for and select the appropriate Employee.
4. Enter the 5 digit Badge Number that appears on the back of the County issued Proximity Card.
5. Click on *Save* to record your changes!
6. Verify *'Your changes have been saved'* message appears in the top left hand corner of the screen.

Incorrect Routing of Forms

If forms are being routed incorrectly, follow the below steps to verify the security is set up correctly.

To verify the user is on the correct team:

1. Navigate to: Maintenance > Employee > Employee
2. Search for and find the appropriate employee
3. Click "Edit"
4. Click the "Employee Teams" hyperlink at the top of the page. Ensure the employee is on the correct team and <u>note the team name</u>

Verify the team has the correct Supervisor

1. Navigate to Maintenance > Security > Team Security > Team
2. Enter the Team Name in the Team field that you noted above
3. Click Find
4. Click "Edit" next to the Team you want to view
5. Click the "User Permissions" hyperlink. Find where the "For This Role" field is equivalent to Supervisor. This entry should have the "User" field = the employee's correct Supervisor.

Note: If either of these values is incorrect, follow the above instructions to make correction. If you still have questions, contact Central HR.

Reduced schedule employees

INTIME includes Shift Patterns for Reduced Schedule employees. To verify that employees are assigned to the correct Shift Pattern or to update an existing Shift Pattern:

1. Navigate to: **Maintenance > Employees > Employee Basic Information – Override**
2. On the Employee Selection page, select the employee whose Shift Pattern you would like to view / update and enter the Effective Date.
3. Click **Go** to bring up the employee's record.
4. Verify or update the Shift Pattern using the Shift Pattern lookup icon or if you know it, you can type it directly in the Shift Pattern field.
5. Remember to save your changes by clicking Submit at the bottom of the page.

Note: Some Reduced Schedule employees work very dynamic Shift Patterns. You can use Effective Dating to plan ahead for known Shift Pattern changes. For example, if a Supervisor knows that effective 6/1/2009, an employee will be working an alternate Shift Pattern, he / she can future date the Shift Pattern by entering 6/1/2009 as the Effective Date on the Employee Selection page.

You can also update an employee's daily schedule manually using the following steps.

For those people taking a full day off once a week, the process is…

Steps to Set Employee's Shift to Off
1. Open Timesheet
2. Go to specified day
3. Select "New Edit"
4. Select "Shift"
5. In the box where it says SHIFT, enter "OFF"
6. Hit Submit

The employee is now off for that specific day. Rules (meal, shift diff, etc.) will not fire for that day.

Steps to Reverse a Particular Off Shift
1. Open Timesheet
2. Click "Show Applied Overrides"
3. Go to the specified day
4. Where you see "Edit Shift" click on the trash box
5. Click Submit

For those employees working reduced schedules 2 or more days a week, the process is:

To Set New Schedule
1. Open Timesheet
2. Go to specific day
3. Click "New Edit"
4. Select "Sched Times" if no lunch will be taken
5. Put the new start and end times
6. Click Submit

Note: If the Shift is configured in INTIME, you can select Shift from the New Edit dropdown.

The new schedule won't appear on the Timesheet as you're not changing the shift (which is visible) just the schedule. If you open the work details for a given day, you'll now see the updated hours.

To Reverse Schedule Changes
1. Open Timesheet
2. Click on 'Show Applied Overrides'
3. Go to the specific days
4. Next to the EDIT SCHED TIMES, click on the trashcan checkbox
5. Click Submit

Recreating schedules
You may encounter an issue where a Shift Pattern has been changed but you do not yet see the change applied to the Timesheet. To resolve, you will need to recreate the schedule following the steps below:
1. Click on the Timesheet link across the top toolbar
2. Use the Timesheet Parameters page to bring up employee's Timesheet
3. Click on the *Schedule* link near the top of the page
4. Click on *Recreate Schedule*

Maintain employee shifts
1. A set of shift and/or shift patterns are created in INTIME by Central HR
2. Default shift/shift patterns will be assigned to employees by the Department HR Rep or Supervisor
3. Manual changes to an employee's shift pattern can be made on a permanent or temporary basis in INTIME by the Department HR Rep or Supervisor

Key Points:
- Manual updates / overrides to shifts by the Timekeeper or Supervisor will be required for employees who need a schedule other than the default schedule (Including new or transferred employees).
- The majority of County employees will have fixed shifts that will not require regular maintenance. However, the Department of Public Works, Parks, Police, and Corrections have more dynamic shifts/shift patterns and will need to be monitored and updated more frequently.
- Some employees will not have a regular default schedule (e.g., part-time or seasonal).

Maintain employee data
1. Employee Information is updated in NUHRS
2. Interface (HR Refresh) from NUHRS will update existing employee data and new employee information in INTIME
3. Authorized user will update the following information in INTIME as necessary:
   - Default Shift Patterns
   - Employee Details
   - User Details (Security Setup)
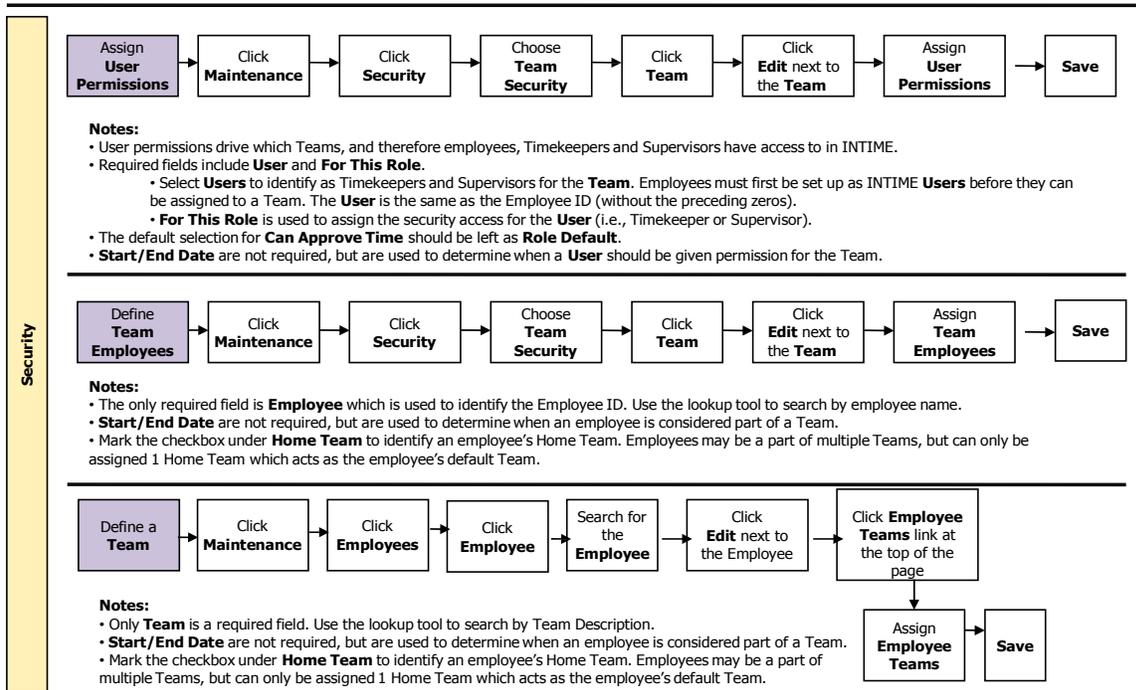   - Employee badge information

Key Points:
- NUHRS will continue to be the system of record for employee data.
- Some employee data not interfaced by NUHRS will be included in INTIME, such as schedules and labor metrics.

Common schedule actions by role
- **Central HR:** Creates new values for shifts and shift patterns in INTIME.
- **Department HR Representative:** Assigns an existing schedule (shift/shift pattern) to an employee.
- **Timekeeper or Supervisor:** Adjust schedules on an employee's timesheet manually – only for those employees who work a schedule other than the default schedule of 9:00am to 4:45pm.
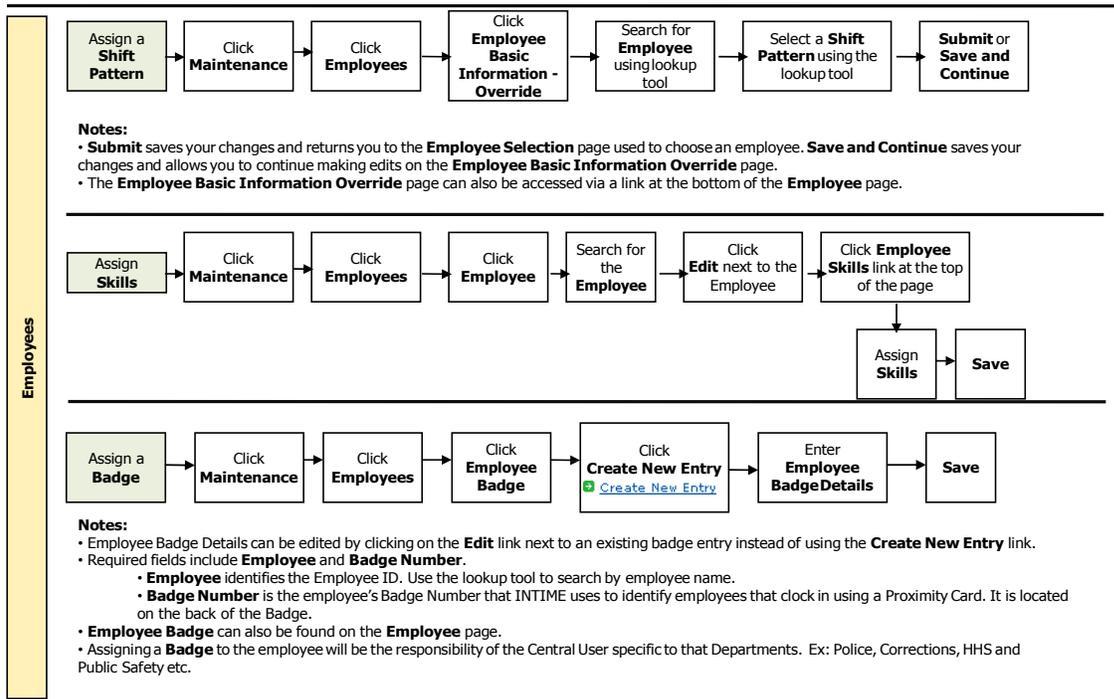
Department HR Activities

INTIME Activities: Department HR Rep Only

Security

Assign **User Permissions** → Click **Maintenance** → Click **Security** → Choose **Team Security** → Click **Team** → Click **Edit** next to the **Team** → Assign **User Permissions** → Save

Notes:
- User permissions drive which Teams, and therefore employees, Timekeepers and Supervisors have access to in INTIME.
- Required fields include **User** and **For This Role**.
  - Select **Users** to identify as Timekeepers and Supervisors for the **Team**. Employees must first be set up as INTIME **Users** before they can be assigned to a Team. The **User** is the same as the Employee ID (without the preceding zeros).
  - **For This Role** is used to assign the security access for the **User** (i.e., Timekeeper or Supervisor).
- The default selection for **Can Approve Time** should be left as **Role Default**.
- **Start/End Date** are not required, but are used to determine when a **User** should be given permission for the Team.

Define **Team Employees** → Click **Maintenance** → Click **Security** → Choose **Team Security** → Click **Team** → Click **Edit** next to the **Team** → Assign **Team Employees** → Save

Notes:
- The only required field is **Employee** which is used to identify the Employee ID. Use the lookup tool to search by employee name.
- **Start/End Date** are not required, but are used to determine when an employee is considered part of a Team.
- Mark the checkbox under **Home Team** to identify an employee's Home Team. Employees may be a part of multiple Teams, but can only be assigned 1 Home Team which acts as the employee's default Team.

Define a **Team** → Click **Maintenance** → Click **Employees** → Click **Employee** → Search for the **Employee** → Click **Edit** next to the Employee → Click **Employee Teams** link at the top of the page → Assign **Employee Teams** → Save

Notes:
- Only **Team** is a required field. Use the lookup tool to search by Team Description.
- **Start/End Date** are not required, but are used to determine when an employee is considered part of a Team.
- Mark the checkbox under **Home Team** to identify an employee's Home Team. Employees may be a part of multiple Teams, but can only be assigned 1 Home Team which acts as the employee's default Team.

Employees

Assign a Shift Pattern → Click **Maintenance** → Click **Employees** → Click **Employee Basic Information - Override** → Search for **Employee** using lookup tool → Select a **Shift Pattern** using the lookup tool → **Submit** or **Save and Continue**

Notes:
• **Submit** saves your changes and returns you to the **Employee Selection** page used to choose an employee. **Save and Continue** saves your changes and allows you to continue making edits on the **Employee Basic Information Override** page.
• The **Employee Basic Information Override** page can also be accessed via a link at the bottom of the **Employee** page.

Assign Skills → Click **Maintenance** → Click **Employees** → Click **Employee** → Search for the **Employee** → Click **Edit** next to the Employee → Click **Employee Skills** link at the top of the page → Assign **Skills** → **Save**

Assign a Badge → Click **Maintenance** → Click **Employees** → Click **Employee Badge** → Click **Create New Entry** → Enter **Employee Badge Details** → **Save**

Notes:
• Employee Badge Details can be edited by clicking on the **Edit** link next to an existing badge entry instead of using the **Create New Entry** link.
• Required fields include **Employee** and **Badge Number**.
    • **Employee** identifies the Employee ID. Use the lookup tool to search by employee name.
    • **Badge Number** is the employee's Badge Number that INTIME uses to identify employees that clock in using a Proximity Card. It is located on the back of the Badge.
• **Employee Badge** can also be found on the **Employee** page.
• Assigning a **Badge** to the employee will be the responsibility of the Central User specific to that Departments. Ex: Police, Corrections, HHS and Public Safety etc.

Remember: INTIME will validate that employees have both ON and OFF clock times. On days where employees do NOT have both ON and OFF clock times (uneven clocks), Supervisors will be unable to authorize any of the employee's time/usage for that day. A Calculation Error (red circle with white exclamation point) will appear on the Timesheet; clicking on the error details will display the message *Work Summary Un-Authorized*.

It is critical to resolve uneven clocks so time can be authorized. To resolve this issue, ask your employees to submit a Missed Clock Form for each instance where they did not clock ON / OFF. Once the Missed Clock Form is approved, the clock time will appear on the Timesheet and the time for the day can be authorized. Or for employees that have access to their own electronic Timesheet, they can enter the missing time directly onto the Timesheet along with an explanation comment. Similarly, once the time has been entered, the time for the day can be authorized.

Employee Basic Information – Override Screen

Access Employee Information:
Navigation: *Maintenance > Employees > Employee Basic Information - Override*

Shift Pattern Assignment:
- Most employees will have a default shift pattern of 9:00am – 4:45pm.
- Department HR will need to manual change the default schedule for employees who need a schedule other than the default value of 9:00am – 4:45pm.

Employee Basic Information Override Screen: Shift Pattern Assignment

Step	Instructions	
1	From the Employee Basic Information – Override screen, click on the **lookup** icon next to the **Shift Pattern** field.	
2	Select the correct Shift Pattern name. • Use the wildcard symbol (%) in the Shift Pattern name or Description columns to help you search for the correct Shift Pattern to assign. • Note: The wildcard symbol allows you to search off of incomplete information. As an example; if you	

Step	Instructions	Notes
	need to find a list of all Shift Patterns that include a start or end time of 9:00am, enter "%9:00a" in the Description field and click on find.	
3	Scroll to the bottom of the page, make sure the correct **Override Start Date** is accurate.	
4	Click on **Save and Continue** to save your changes and keep you on the same screen. • Clicking **Submit** saves your changes and closes you out of the employee's record. • Clicking **Cancel** removes your changes and closes you out of the employee's record.	

Employee Page
Navigation: *Maintenance > Employees > Employee*

Assign Reader Groups
- Clock Reader Groups drive what Clock Reader an Employee can use to Clock In / Out.
- Clock Reader Groups have been grouped by building.
- Assign each employee in your department the appropriate Clock Reader Group.
  (Note: Employees that are only using the electronic Timesheet to clock in / out do not need to be set up with Reader Group(s).)

Employee Page: Reader Group(s) Assignment

Step	Instructions	Notes
1	**Navigate to** Navigation: *Maintenance > Employees > Employee*	
2	Enter search criteria in the top fields to find a specific employee, e.g., an employee's last name. Click on find to view your results.	 • Click on Clear to remove your search

		Click on **Edit** to the left of the employee's name.	parameters and begin another search.
3		Click on the **Employee Reader Groups** hyperlink at the top of the page to navigate to the Employee Reader Group section of the Employee's record.	Employee Job Employee Reader Groups
4		Select the appropriate **Reader Group** from the drop-down menu: • Reader Groups are grouped by building. • More than one Reader Group can be selected, if applicable. ***Click on Save!***	**Employee Reader Groups** Top Find Reader Group * Del ☐ 240 OLD COUNTRY ROAD Save Return to form listing
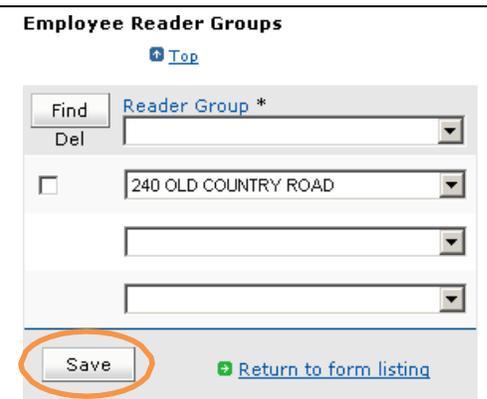
Note: Each section on the Employee Screen has a Save button to save the changes which only apply to a particular area of the Employee Record.

Maintenance > Employees > Employee > Details

✔ Your changes have been saved.

Employee Details
 Create New Entry
 Return to form listing

 Employee Data   Employee Leave Balance   Employee Job   Employee Reader Groups   Employee Teams   Employee Skills

The system will display a note at the top of the Employee Page confirming that 'Your changes have been saved.'
Scroll up to the top of this page to ensure that this note is displayed.

Validate Team Hierarchies:

- The Team Hierarchy structure in INTIME establishes the reporting relationship between Teams. Department HR will need to validate that each Employee has been assigned to the correct Team and the User Permissions for the Teams within your Department have been established.

Important Notes:

- Use the following INTIME User / Employee definitions provided to help you complete this task.

- o **User =** A User in INTIME is an individual that has permissions (access to perform time and leave activities), i.e., a Timekeeper or Supervisor, for an assigned Team of Employees. *(These permissions are assigned on the User Security screen.)*
- o **Employee =** All individuals that are part of a Team in INTIME are considered Employees. All Users are also considered Employees. *(These permissions are assigned on the Employee screen)*

- Employees can only be assigned to one home team (department, e.g., IT-001). Assigning an employee to a home team means the team is permanent. A temporary team assignment is available if needed.

Step	Instructions	Notes
1	**Navigate to** Navigation: *Maintenance > Employees > Employee*	
2	Enter search criteria in the top fields to find a specific employee, e.g., an employee's last name. Click on find to view your results. • Click on **Edit** to the left of the employee's name.	• Click on Clear to remove your search parameters and begin another search.
3	Use the **Employee Teams** hyperlink at the top of the page to quickly navigate to this section of the employee's record.	
4	Review the assigned team for accuracy. • Refer to the Employee Data Template provided to determine if the Employee Team assigned is correct.	
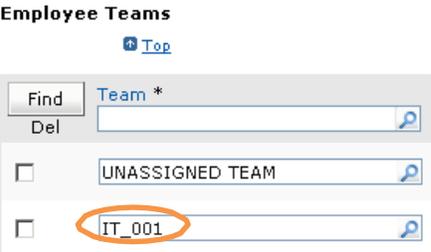
Validate Team Hierarchies Continued

Step	Instructions	Notes
5	If the assigned Team value is not current, click on the **lookup** icon to search for the appropriate team.	
5	You have two search options: **Option 1:** Enter your two character department code for **Team** to list all Employee Teams for your department, e.g., IT. **Option 2:** Enter the wildcard symbol (%) in the Description field along with the supervisor's name for the team, e.g., "%Jones" to find all Teams with a Supervisor name of "Jones". - *Click on **Find** to view the results of your search.* - *Click on the link to the appropriate Team you would like to assign the Employee (IT_004).*	
6	Enter a **Start Date** that is effective the <u>day after</u> the previous team **End Date**. Select the **Home Team** checkbox to assign a permanent Team. (Remember – an Employee can only be assigned to 1 Home Team.)	

7	Click on **Save** at the bottom of the Employee Team section. - Remember to confirm the system-generated note at the top of the page to ensure your changes have been recorded. ✔ Your changes have been saved.	Employee Teams

---

User Security Page

Navigation: *Maintenance > Security > Users*

- *There are two values that need to be updated / validated for each Employee on the User Security Page:*

   Assign the INTIME Security Group:
   - Using the INTIME Role summary provided below, assign the Security Group for each employee in your department.

   Verify User Permissions:
   - After you have established the Employee Teams on the Employee screen, the User Permissions will need to be defined on the User Security page.

Search Instructions for the User Security Page:

Step 1: Navigate to **Maintenance > Security > User Security**

Step 2: Click on the lookup icon for Employee

Step 3: Enter the Last Name of the Employee

Step 4: Click on Find

Step 5: Click on the Name of the Employee and the Lookup window will close

Step 6: Click on **Find** again

Step 7: Click on **Edit** next to the Employee's record

Update the Security Group:

Step	Instructions
1	Assign the correct INTIME role in the **Security Group** field**:** • All users will default to the INTIME USER – Badge Security Group • Reference the role descriptions provided on the next page and select the lookup option to change this group if necessary, i.e., Supervisor, Viewer, INTIME User – Timesheet, etc.
2	*Click on Save to record your changes!*

INTIME Security Groups:

Security Group	Summary	Tasks
AUDITOR	Responsible for reviewing County wide data for accuracy and compliance.	Reviews INTIME reports • Read only access • View County wide data
CENTRAL USER	Ability to view and update County wide data.	View County wide data • Creates new values
DEPARTMENT HEAD	Overall responsibility for time and leave activities within department.	Ability to perform or delegate supervisor and hr time and leave tasks • Reviews and approves/declines OT Authorization Forms • Assigns a Delegate to approve/decline OT Authorization Forms (Optional)
DEPARTMENT HR	Responsible for assigning and maintaining employee data.	Assigns default shift patterns • Assigns Security data, including Proximity Badge number and Security Group • Modifies and maintains Reader Groups and Employee Teams • Updates/Edits Proxies and Delegates
INTIME USER – BADGE	Responsible for maintaining work schedule in Employee Self-Service (ESS).	• Clocking In / Out using a Proximity Badge • Submits Time Off Request Forms, Missed Clock Forms, and OT Authorization Forms to Supervisor • Views their balance/personal information
INTIME USER - TIMESHEET	Responsible for maintaining work schedule.	Clocking In / Out by entering time directly on the electronic Timesheet (An employee assigned to this role can also use a Proximity Badge to Clock In / Out) • Submits Time Off Request Forms, Missed Clock Forms, and OT Authorization Forms to Supervisor • Views their balance/personal information

TIMEKEEPER	Responsible for editing employee time.	Keeps records of hours worked by employees • Keys in time entries once approved • Enters Overrides (i.e., Corrects Missed Punches) • Point of contact to assist employees and Supervisors in obtaining information maintained in NUHRS when needed • Modifies shifts/shift patterns and default labor allocation
SUPERVISOR	Responsible for approving employee time and exceptions.	Certifies Time (Pay Period Summary) • Approve Time Off Requests and Missed Clock Forms • Verifies employees have sufficient balance when requesting time off ('Other' category) • Enters Overrides • Monitors for Time Entry Leave Abuse • Enforces County policies • Reviews INTIME Reports • Modifies shifts/shift patterns and default labor allocation
VIEWER	Responsible for generating and viewing reports to flag exceptions.	• Support staff by generating and analyzing reports • Read only access based on security

• ***Note:*** *Department HR will assign employees to either the INTIME USER – BADGE or the INTIME USER – TIMESHEET role depending on the time entry method determined by your department head.*

Verify User Permissions:

- After you have assigned the Employee's Security Group, scroll down on the User Security page to verify the User Permission.
- **User =** A User in INTIME is an individual that has permissions (access to perform time and leave activities), i.e., a Timekeeper or Supervisor, for an assigned Team of Employees.

Step	Instructions	Notes
3	Click on the **Team Permissions** hyperlink at the top of the User Security page or simply scroll down the page after you have entered the Proximity Badge number and Security Group.	
4	Review the Team Permissions for each User in your department. - Refer to the Employee Data Template provided to determine if the Employee Team assigned is correct.	
5	If the assigned Team value is not current, click on the **lookup** icon to search for the appropriate team.	
6	You have two search options: **Option 1:** Enter your two character department code for **Team** to list all Employee Teams for your department, e.g., IT. **Option 2:** Enter the wildcard symbol (%) in the Description field along with the supervisor's name for the team, e.g., "%Jones" to find all Teams with a Supervisor name of "Jones". - *Click on **Find** to view the results of your search.* - *Click on the link to the appropriate Team you would like to assign the Employee (IT_007).*	
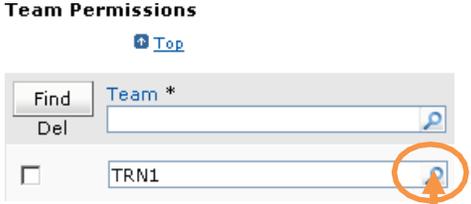
Verifying User Permissions Continued

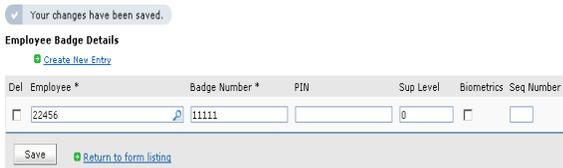| Ste p	Instructions	Notes
7	Enter the Current Date for **Start Date**.	
8	Enter the correct **For This Role** value to define the permissions a User should have for this Team.	
9	Click on **Save** at the bottom of the Employee Team section. - Remember to confirm the system-generated note at the top of the page to ensure your changes have been recorded. Your changes have been saved.	
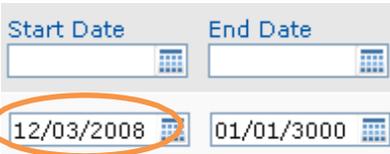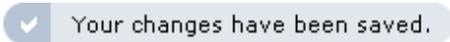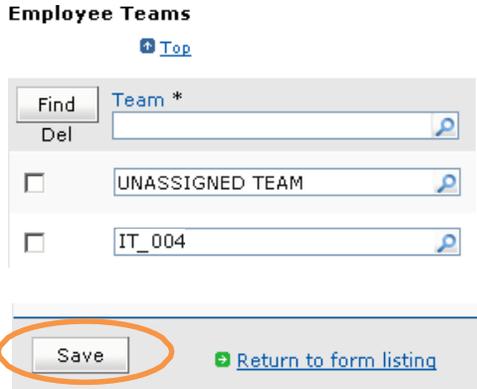
Employee Badge Page

Navigation: *Maintenance > Employees > Employee Badge*

- *There is one value that needs to be updated / validated for each Employee on the Employee Badge Page:*

Add the Proximity Badge Number:

- This is the five digit number on the back of the employee's Proximity Badge.
- The Proximity Badge number needs to be assigned in order to associate the badge used to clock in/out with the correct employee. (Reference the Employee Data Sheet provided to find the correct badge number to assign)

Add the Proximity Badge Number:

Step	Instructions	Notes
1	Navigate to: ***Maintenance > Employees > Employee Badge***	Maintenance > Employees > Employee Badge
2	Click Create New Entry	Maintenance > Employees > Employee Badge **Employee Badge** Create New Entry
3	Type in the Employee ID or use the Employee lookup icon to search for and select the appropriate Employee. Example: In the sample screenshot to the right, Employee 22456 is selected.	Maintenance > Employees > Employee Badge > Create New **Employee Badge Details** Del Employee * Badge Number * PIN Sup Level Biometrics Seq Number 22456 Save Return to form listing
4	Enter the 5 digit Badge Number that appears on the back of the County issued Proximity Card. Ex: In the sample screenshot to the right, Badge Number 11111 is selected.	Maintenance > Employees > Employee Badge > Create New **Employee Badge Details** Del Employee * Badge Number * PIN Sup Level Biometrics Seq Number 22456 11111 Save Return to form listing
5	*Click on Save to record your changes!*	Maintenance > Employees > Employee Badge > Create New **Employee Badge Details** Del Employee * Badge Number * PIN Sup Level Biometrics Seq Number 22456 11111 Save Return to form listing
6	*Verify 'Your changes have been saved'.*	Your changes have been saved. **Employee Badge Details** Create New Entry Del Employee * Badge Number * PIN Sup Level Biometrics Seq Number 22456 11111 0 Save Return to form listing

The Timesheet

Updating Tardy Balances:

- Department HR will manually set the prior Tardy balance effective on 12/05/2008 (For RO2 use 4/24/2009) by applying a Conversion of Tardy time code as a Code override on the employee's electronic Timesheet.

Step	Instructions	Notes
1	Navigate to the Employee's **Timesheet**.	
2	Enter the Employee ID or use the Employee Lookup to bring up the appropriate Employee.	
3	Enter date search parameters and click **Go**.	
4	On 12/05/2008, click on the **New Edit** drop-down list, select **Code** and a Code Override lookup screen will be displayed.	
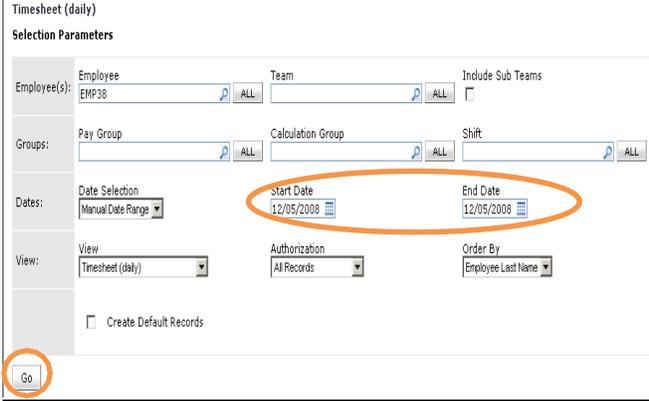
Step	Instructions	Notes
5	Enter the Start and End Time using a time period outside of the default shift pattern to establish the Tardy balance amount. Ex: An Employee, John, as a prior Tardy balance of 35 minutes and a default shift pattern of 9:00am – 4:45pm. Enter a Start Time of 8:00am and End Time of 8:35am.	*Note: Make sure to enter an **Override Comment** to indicate the reason for the SETARDY action, i.e., "Go-Live Tardy Balance".*
6	Click on submit on the Code Override pop-up window	
7	Click on Apply next to the date (12/05/2008) where the Code Override was applied.	
8	Click on Submit at the bottom of the Timesheet to save your changes (after Apply checkbox is marked)	
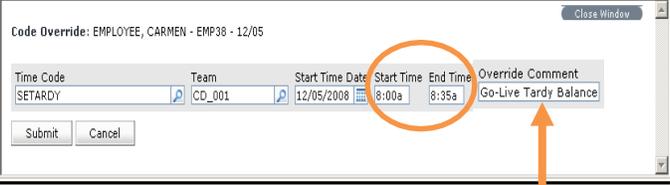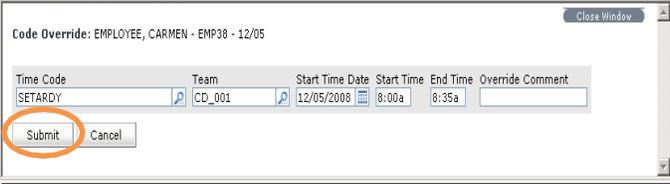
Adding Approved Leave Requests:
- Department HR will manually enter an edit (override) directly on the Timesheet for all future Employee Request and Authorization for Leave Forms (Yellow Form-5000) on or after 12/05/2008 that were approved prior to Go-Live.

Step	Instructions	Notes
1	Navigate to the Employee's Timesheet.	| Messages 24 | Timesheet | Last Timesheet | My Reports | Employee | Team | Payroll | Favorites
2	Enter the Employee ID or use the Employee lookup to bring up the appropriate Employee.	Timesheet (daily) Selection Parameters — Employee(s): Employee EMP38 ALL
3	Enter date search parameters and click **Go**.	Timesheet (daily) Selection Parameters — Start Date 12/22/2008, End Date 12/22/2008. Go
4	Click on the *New Edit* drop-down list, select **LTA** and a Code Override lookup screen will be displayed. Note: In the example to the right, 12/22/08 was selected.	New Edit, Code, Comment, Premium, Shift, Pattern, Sched Times, LTA, Sched Times w Breaks, Employee Holiday, Work Detail. 12/22/2008 Mon 9:00A-4:45P - F

Adding Approved Leave Requests Continued

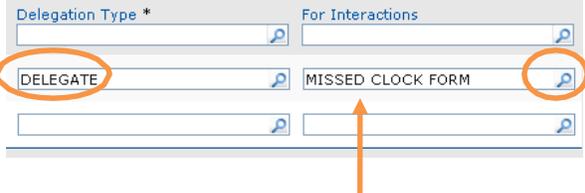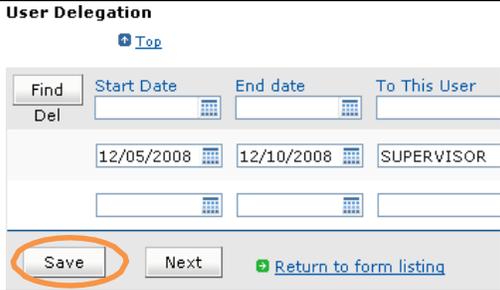| Step	Instructions	Notes
6	The current date will auto-populate the Start and End Date for the Time Code, which can be changed if applying to more than one day.	
7	If applying a full day override, leave the Start and End Time blank and the LTA Override will be applied based on the employee's default schedule for that day. (If only applying a partial day, enter the appropriate Start and End Time for the LTA Override.)	
8	Click on submit on the LTA Override pop-up window.	
9	Click on Apply next to the date(s) where the LTA Override was applied.	
10	Click on Submit at the bottom of the Timesheet to save your changes.	

Proxy/Delegates

Assigning Proxy and/or Delegate authority in the INTIME application allows you the flexibility of creating other authorized users to assist with time and leave activities.

- Proxy Authority enables a user to perform time and leave activities on behalf of another user.
- Delegate Authority is limited to the responsibility of all or specific INTIME Interactions (Forms).
- Department HR is responsible for establishing Proxy / Delegate Authority on behalf of employees who may be out of the office on Go-Live or if the users need to be updated at a later date and an employee is unavailable.

If a Supervisor is unavailable to set up a Proxy and/or Delegate, Department HR can assign this authority on the User Security screen in INTIME:

Step	Instructions	Notes
1	Navigate to: *Maintenance > Security > Users*	
2	Click on **Edit** to the left of the employee's name. Enter or select search criteria in the top fields to find a specific employee or a group of employees, e.g., an employee's last name, or select a calculation group. Click on find to view your results.	Maintenance > Security > Users **Users** Create New Entry Find / Clear — User: jsmith / Password Edit JSMITH **********
3	Click on the **User Delegation** hyperlink at the top of the page to quickly navigate to this section of the employee's record.	Team Permissions User Delegation
4	Enter the Start / End date: Leave these dates blank if you would like to assign a permanent back-up or enter specific dates if only assigning Proxy / Delegates for a short period of time.	**User Delegation** Top Find / Del — Start Date — End date — To This User Save Return to form listing
5	Add **To This User:** Use the lookup icon to search for and select the INTIME user you would like to assign as the Proxy / Delegate.	
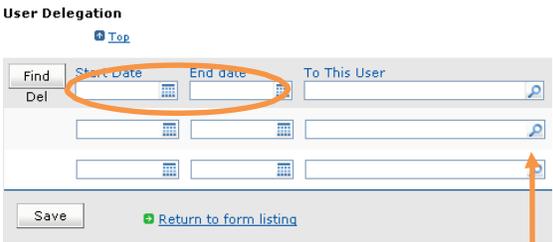
Adding Proxy / Delegate Authority Continued

Step	Instructions	Notes
6	Scroll to the right and complete the Delegation Type and For Interactions fields: - Use the lookup icon for **Delegation Type** to select whether you would like to assign Proxy or Delegate rights. - If selecting a Delegate, use the lookup icon on the For Interactions field to specify if you want ALL or a specific form/request to be routed to the user.	*Note: If a Delegate needs to be assigned for more than one form, you will need to create a second entry for the Delegate permissions.*
7	Scroll back to the left and click on **Save** to add the Proxy / Delegate record.	

Reporting

Understand the benefits and uses of INTIME reports
- Track efficiencies
- Report on time (worked, paid time off, OT, etc.)
- See overtime/absences for an entire calendar year
- Approve time (Supervisors)
- Identify time entry records that need review / correction
- Select the data to be analyzed
- Summarize the report
- Deliver a formatted-printout of the results

Types of Reports

STANDARD REPORTS
- Standard Reports are those that you can run "Ad Hoc" but can also be viewed in the following formats: PDF, Excel or HTML.
- Standard Reports are identified on the My Reports page with a green arrow icon next to the report title.

ON DEMAND REPORTS
- **On Demand Reports** are those for which the results are displayed on the screen immediately. You can select various parameters for these reports (the available criteria differs for each report), however, they can be viewed in HTML format only. (*Note*: To print these reports after they have displayed on the screen, simply go to **File > Print Preview**. Then select your preferred print view using the dropdown to the left of the *Help* button.)
- **On Demand Reports** are identified on the My Reports page with a blue folder icon next to the report title

- On Demand Report parameters can be saved. This allows you to run the report again with the same criteria only requiring you to change the date range.
    1. Click on My Reports > [Report Name, e.g., Exception Report] > New Report
    2. Enter your selection parameters
    3. Before clicking on GO click the Save checkbox in the Save Parameters section, which will automatically select the Personal Report checkbox.
    4. Enter the Name and Description of the Report
    5. Then click Go to run the Report
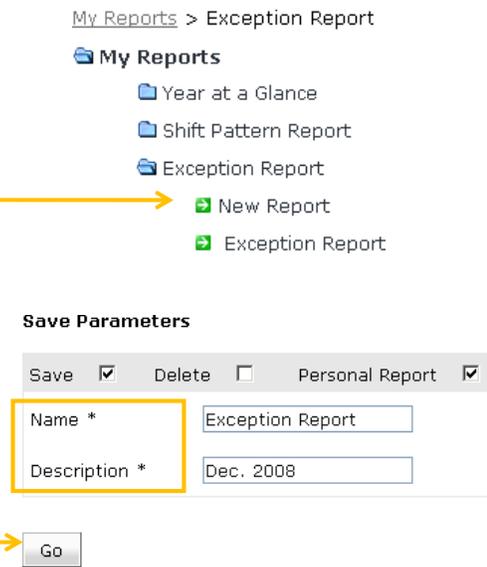
    Note: You will find the saved version of your report when you navigate back to My Reports and open the folder of the report where you saved a copy.

Key Icons
- Click to view the report in HTML format. When you view a multi-page report in HTML format, clicking the *Bottom* link might cause the page numbers to display incorrectly. It is recommended that you use the *Page Down* links instead

- Click to view the report in PDF format. You must have Acrobat Reader installed.

- Click to export the report into Excel format. You must open the Excel file before saving it to your computer in order for the file to function properly. If you are presented with the option of either **opening** or **saving**, open it first, and then save it.

- Click to return to the search parameter page to change your report criteria.

Navigation: My Reports > Employee Punches by Day Report

Report Overview: (Standard Report) Provides a breakdown of Productive, Overtime, and Absent Hours and fractions of hours by work day for a given employee on a team. The report also shows the punch type (on / off), punch time, and punch data for each employee. This report allows for a quick glance of employee's punch on / off times and when a clock reader was user. Note: Punch Data with the following example, "DST=F&Online=T&DTZ=America/New York&TZ=0", indicates that the punch was done on a clock reader. If the punch data field is blank, the clock entry was made either on the electronic Timesheet of through the Missed Clock Form.

Search Parameters: Employee ID or Team, Start Date and End Date.

Navigation: My Reports > Shift Pattern Report > New Report

Report Overview: (On Demand Report) Provides the daily schedule for a specific employee for a two week period and displays any changes that were made on the Timesheet to the schedule for a day.

Search Parameters: Shift Pattern, Employee ID, Start Date, and Order By.

Navigation: My Reports > Time Code by Team Report

Report Overview: (Standard Report) Lists the time spent by each Team for each Time Code used in a specified time interval. The records are grouped first by either team or time code and second by the other depending on your selection for the dropdown 'Group By'. Time Codes for a particular work may have different hour types. For example, the Time Code WRK will have REG as the hour type. You must specify a data range and can narrow your search parameters by selecting specific Time Codes.

Search Parameters: Employee ID, Teams/Include Sub Teams, Pay Group, Calculation Group, Time Code, Date Selection, Start Date, End Date and Authorization.

Navigation: My Reports > Exception Report > New Report

Overview: (On Demand Report) Helps Supervisors quickly identify areas that require their review. It displays employees who have incurred exception time codes (e.g. LE, LATE, etc.) in the specified time period. The employee name, team name, work date, Authorized (Yes or No) and the Time Code (shown as 'Earnings Code') are shown on the report as well as a link to the employee's Timesheet for that day (click on Details to the right of the item)

Search Parameters: Employee, Team, Include Sub Teams, Pay Group, Time Code, Only Unauthorized, Date Selection, Start Date, End Date and Order By (sort).

Navigation: My Reports > Unauthorized Records Report

Overview: (Standard) Displays unauthorized employee work detail records for an Employee or Team of employees. The report displays the employee's work date, ID #, name, pay group, shift, clocks and hour summary. This report can quickly flag records that the Supervisor will need to review and authorize. You must specify Start and End Dates for the report and optionally, Employee or Team.

Search Parameters: Employee ID, Team, Include Sub Teams, Payroll Group, Calc Group, Start Date and End Date.

Navigation: My Reports > Balance Report > New Report

Overview: (On Demand) Displays an employee's balances during a specified time period. Employee balances can include Time Codes such as sick hours (SICK) or Vacation hours (VAC). The report also displays itemized changes to an employee's balances. Changes may include a decrease in the number of sick hours or vacation hours etc. available (such as when sick or vacation leave time is used) or an increase in the number of sick hours or vacation hours etc. when the .5 SCK or .5 VAC accrual is earned at the end of the pay period.

Search Parameters: Employee, Team, Balance Type, Start Date, End Date and Order by (Sort).

Navigation: My Reports > Year At A Glance > New Report

Report Overview: (On Demand Report) Displays various types of time and attendance information (Absences, Overtime and Schedule) for an employee in a given calendar year. It is divided into two parts: the Year at a Glance View, and the Detail View. This report allows for a quick glance of Time Codes used by Employees for a given year. The detail can be viewed by day, month or year. View by Day shows the Work Date, Employee, ID #, Time Codes, Description, Amount of Hours. View by Month totals each Time Code by Employee for any given month in that year. View by Year totals each Time Code by Employee for the specified year.

Search Parameters: *From the My Reports screen:* Report Type, Year, Employee, Team/Include Sub Teams. *From the Employee Dashboard screen:* Employee, Date Selection, Start Date, End Date and Action.

Navigation: Pay Period Summary (Located in the Table of Contents on the left side of screen)
Overview: (On Demand Report) Allows Supervisors to review and certify employee time for Teams they supervise. The Pay Period Summary displays the summation of data for a selected employee(s) or Teams for a given pay period (bi-weekly). This report should be reviewed and submitted by all Supervisors at the end of the pay period.
Search Parameters: Payroll Group (NASSAU), Pay Period Selection, Start Date, Include Pay Periods, Authorization, Employees or Team, incl. Sub Teams.

Please note that in many report selection parameters, there is an option to include Sub-Teams. With the exception of the root team (i.e., HR for Human Resources without any numbered team description), INTIME contains a *flat* hierarchy. This means that for all other teams, excluding the root team, if the Sub-Team checkbox is selected, the report will return the same results if it was not flagged to include Sub-Teams. If, however, you have access to the root team, meaning access to your entire department, you must check "Include Sub-Teams", to view all of your employees. Otherwise, your reporting results will only include the Department Head who belongs to the root team.

GLOSSARY

- **Adjust Date:** Determines which overrides are captured as retroactive adjustments. These adjustments are separated out on the Payroll Export File. Changes made to timesheets on or before this date are captured as retroactive adjustments and are inserted in the "adjustments" view of the current pay period's payroll export file. Both Timekeepers and Supervisors can make changes to any prior Timesheet, provided it is before the Supervisor Date.
- **Calculation Error:** An error that occurs on the timesheet such as an employee exceeding an available balance.
- **Default Schedule:** A Default Schedule is the designated shift pattern which is auto-assigned to a user in INTIME until a manual change is made by Department HR or the Timekeeper/Supervisor.
- **Delegate:** A person assigned to act on forms (Time Off Request, OT Authorization Form, Missed Clock Form). As a delegate, all INTIME interactions automatically route to that person's INTIME Workmail inbox. Delegates can only process requests after they have been granted delegate access. Only one delegate can be assigned per interaction (form). Only Supervisors and Department Heads will be able to assign their own delegates, as well as 'become' a Delegate to other users.
- **Department Liaisons:** County personnel who serve as the intermediary between Department Readiness Coordinators (DRCs) and the INTIME Project Team. They provide pre and post Go Live support to their DRCs.
- **Department Readiness Coordinator (DRC):** Support their department in pre and post Go Live (Monitor task progress, communicate issues/questions, complete assessments, etc.).
- **EARLY:** When an employee arrives more than 30 minutes prior to the scheduled start of the shift, the employee's Timesheet will display EARLY. This is unpaid time.
- **Effective Dating:** Controls for what period of time information is valid.
- **Go Live:** The date on which the INTIME system is deployed to County employees.
- **GR – P (Grace Paid):** When an employee arrives less than 6 minutes late to work (only at the start of their Shift), the employee's Timesheet will display GR-P. This is paid time.
- **GR-U (Grace Unpaid):** When an employee arrives less than 30 minutes early to work, the employee's Timesheet will display GR-U. This is unpaid time.
- **Hands Off Date:** The date before which no changes can be made by the Timekeeper or Supervisor. This date occurs after the supervisor date. If changes to prior Timesheets are required for any day(s) prior to the Hands Off Date, Central HR must be contacted. Central HR will then adjust the INTIME Hands Off and Supervisor Dates to allow the appropriate end users to make the required changes.
- **Hierarchies:** Hierarchies define the reporting structure within departments and across the County (i.e. which employees report to which supervisors). Therefore, Security Hierarchy dictates what employees and authorized end users can see.

- **Hour Types:** An hour type specifies the pay category that should be applied to a time period and indicates how the employee will be paid for that time. This includes Regular, OT, and Unpaid. This will not be used by INTIME users *except* for reporting.
- **HR Refresh:** Interface from NUHRS/CHIEFS which updates County employee data in the INTIME application.
- **Labor Metrics:** Used to track and measure the time worked day-to-day and recorded in INTIME. These metrics also capture the costs associated with various activities and tasks within the County. Ultimately, this helps determine how County resources are being used, report on these metrics and make changes accordingly to improve efficiency and control expenses. Available Labor Metrics in INTIME include: Department, Job, and Docket.
- **LATE:** When an employee arrives more than 6 minutes late to work at the start of their Shift, the employee's timesheet will display LATE. This is unpaid time and will increment the employee's Tardy balance.
- **LE (Left Early):** When an employee leaves work before the end of their work schedule, the employee's Timesheet will display LE. This is unpaid time and will increment the employee's Tardy balance.
- **Legacy (Shadow) interfaces/system:** Existing County systems (e.g., NUHRS, CHIEFS, etc.); Interfaces from these systems to or from INTIME.
- **LL (Left Late):** When an employee stays beyond the end of their work schedule, the employee's Timesheet will display LL. This is unpaid time.
- **Lock Outs:** INTIME has a counter that tracks the number of bad login attempts. This will reset to 0 when a successful login occurs. A user will be locked out of INTIME after 5 bad login attempts. Employees will need to contact the IT Help Desk to unlock their account and request a password reset.
- **LUN – U (Lunch):** This displays on an employee's Timesheet to indicate the employee's unpaid lunch.
- **MISSED:** If an employee is not at work during scheduled work hours (outside of the previously mentioned time codes), the employee's Timesheet will display MISSED. For Ordinance employees, if he / she arrived late for their Shift or leaves earlier than their scheduled end time, the Timesheet will display MISSED (unless a Time Off Request has been approved).
- **OACOT, AOTCP, OTOTL:** These are overtime time codes which must be entered to replace the temporary OT codes on the employee's timesheet. An employee will receive OT pay or COMP time after these codes have been applied to the Timesheet.
- **On Demand:** On Demand reports are those for which the results are displayed on the screen immediately. You can select various parameters for these reports (the available criteria differs for each report) and they can be viewed online only.
- **OT_CASH, OT_COMP, OT_CASH Override:** These are temporary (unpaid) Overtime time codes requested by the employee through the Overtime Authorization Form. An employee will not get paid for the OT unless this time code is changed to a permanent (paid) time code such as OACOT.

- **Overrides:** Changes / edits made to the Timesheet.
- **Override Error:** An error that occurs on the timesheet such as overlapping shifts / schedules.
- **Proxy:** Can perform all time and leave activities on behalf of another user based on the time period defined by the original request. When an individual 'becomes' another users, he/she will see the exact same screen and will have fill security privileges of that user. Proxies can view both past and future requests and make any changes during the time he/she is acting as proxy. A supervisor can assign more than one proxy, if necessary. Supervisor must communicate the duration for the responsibility, as INTIME will not automatically notify nor remind the proxy of the added responsibility. Only Supervisors and Department Heads will be able to assign their own proxies, as well as 'become' proxy to others.
- **Schedules:** Consist of shifts and shift patterns.
- **Security:** INTIME Security is role based (i.e. Timekeeper / Supervisor). Users see the pages specific to their role.
- **Shift Breaks:** A Shift Break is a defined stoppage of work during a shift, such as lunch or other non-work activity. A shift break will be defined for lunch and is included in each Shift as defined by the department. This is a placeholder only – an employee is not required to take their lunch at the exact time listed in their schedule. Hourly employees that do not have a default shift on their timesheets must clock out / in for lunch.
- **Shift Differentials:** A Shift Differential represents a change to an employee's pay rate for working an alternate shift.
- **Shift Pattern:** A Shift Pattern is a collection of shifts, including days off, that form a repeating pattern. The pattern may be a work week or a rotation of shifts that repeat every 2, 3 or more weeks.
- **Shift:** INTIME Shifts are used to capture the default time an employee is scheduled to work in a day.
- **Standard Reports:** Standard Reports are those that can be viewed online, in PDF, Excel and HTML. You can select criteria for these reports; the available criteria differ for each report.
- **Subject Matter Experts (SME):** County personnel from various departments that have deep understanding of the County's business processes, policies and rules.
- **Supervisor Date:** The date at which point only Supervisors can make changes to any prior Timesheet. This date is before the Hands Off Date.
- **System Administrator Reports:** System Administrator Reports are those that only System Administrators can run based on security settings
- **Tardy**: Balance of cumulative LATE and LEFT EARLY (LE) minutes.
- **Time Codes:** A Time Code is used to classify a time period an employee is scheduled to work (i.e. VAC; SCK; PER etc.). These Time Codes are tied to INTIME balances and determine how associated balances change when applied to the Timesheet.
- **Timesheet:** A key page used in INTIME to manage time and leave information. The (electronic) Timesheet is used to view work details, view an employee's schedule and

time worked, enter and view overrides and exceptions, clock-on / off (where appropriate) and authorize time.

- **To-Be Processes:** These are the standard processes which the County is going to follow once INTIME is implemented.
- **Unallocated Time:** Time entry that is outside an employee's schedule.
- **Unauthorized Time:** Time entry that is not approved time. Time is auto-authorized for time worked during an employee's scheduled shift.
- **UPER (Personal):** When an employee has an approved personal day off, the employee's timesheet will display UPER.
- **USCK (Sick):** When an employee has an approved sick day off, the employee's timesheet will display USCK.
- **UVAC (Vacation):** When an employee has an approved vacation day off, the employee's timesheet will display UVAC.
- **Workmail:** INTIME Users will use Workmail to send and receive messages, approve / reject / pend forms (authorized users only) and view the status of Time Off Request, Missed Clock Form and OT Authorization Forms.
- **WRK:** This will display on employee timesheets for all employees who are working during scheduled hours. This should be the most common time code and accounts for all "normal" work time.

Job Aids (Located on Web Connect)
- Approving Time Payroll Closeout Job Aid
- Converting Days into Hours Job Aid
- Crosswalk Job Aid
- Flagging Time Entry Abuse Job Aid
- Getting Started Day 1 for End users
- How to Generate INTIME Reports Job Aid
- INTIME Activities Auditor Job Aid
- INTIME Activities Supervisor Job Aid
- INTIME Activities Timekeeper Job Aid
- INTIME Activities Viewer Job Aid
- INTIME FAQ's Job Aid
- INTIME Overview (Powerpoint Presentation)
- INTIME Report Inventory Job Aid
- INTIME Reporting (Powerpoint Presentation)
- INTIME Supervisor (Powerpoint Presentation)
- INTIME Timekeeper (Powerpoint Presentation)
- Key Dates in INTIME Job Aid
- Manual Processes Job Aid
- Military v. Standard Time

- Supervisor & Timekeeper Reference Guide
- Supervisor Quick Reference
- Time Code Descriptions and Tardy Balances Job Aid
- Time Conversion Job Aid
- Time Off Request Form Using the Other Leave Category Job Aid
- Timesheet Overrides Job Aid
- Timing of Interfaces Job Aid
- Using Excel

INTIME Procedures (Located on Web Connect)
1. Special Use Time Codes
2. Proxy Authority
3. Tracking of Rejected Leave Requests
4. Acceptable Comments for Leave Requests
5. Employee Self Service
6. Real Time Access to Leave Balances
7. After the Fact Leave Requests
8. Official County Time
9. Timekeeper for Per-Diem Employees, Commissioners & Board Members
10. Issuance of Employee Badges
11. Leave Requests for Employees Transferring Units
12. INTIME Access Via Internet
13. Personal Information Listed in INTIME
14. Format for Entering Time
15. Time-Off Recorded in Hours
16. Working Through Lunch
17. Clocking In and Out for Lunch
18. Meal Periods
19. Employee Schedules
20. Supervisory Responsibilities
21. Seniority Date
22. File for Miscellaneous Documents
23. Department Self-Review
24. Employee Leave Types on Leave Request Forms
25. Light Duty Flag
26. Skills for Scheduling Purposes
27. Bulk Vacation Picks
28. Global Nature of INTIME
29. Recording Time for Union Staff
30. Buddy Punching
31. Employees Without Access to County Networked Computers