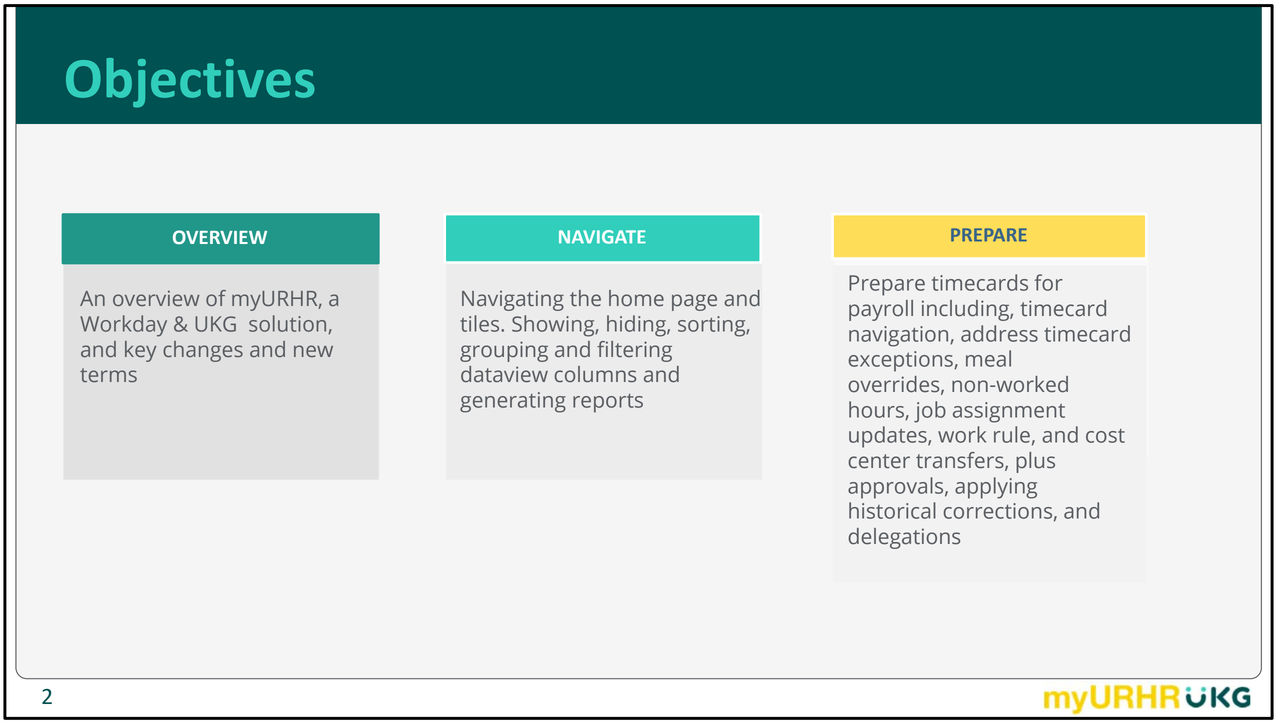
Welcome to Manager Tasks and Outcomes: Timekeeping for Advanced Scheduling Populations in myURHR UKG.



This training is designed to give you the basic skills necessary to begin using the UKG solution.

Learning Objectives:

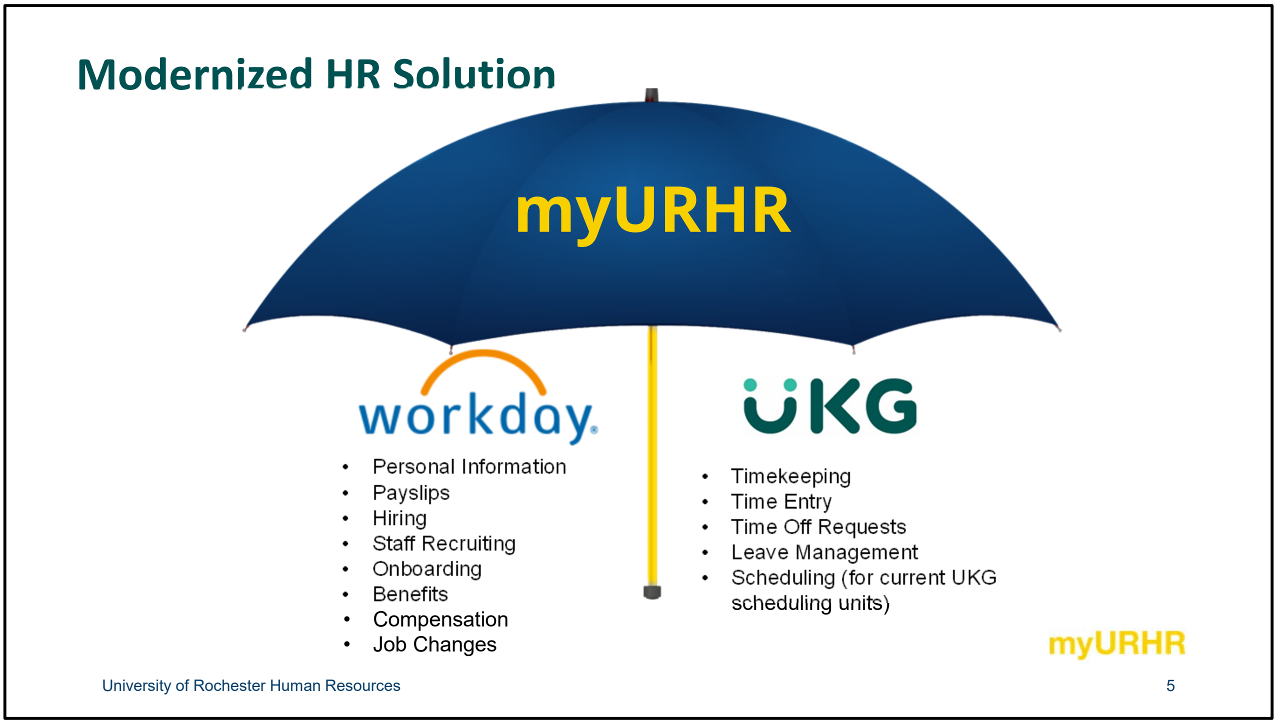
After completing this course, we will have covered:

- Navigate the Home Page, Control Center, and Dataviews
- Delegation
- Prepare timecards for payroll by:
- Timecard navigation
- Address timecard exceptions
- Meal overrides
- Non-worked hours
- Apply Job Assignment updates, Work Rule and Cost Center Transfers.
- Approvals
- Apply Historical Corrections.

This course uses hands-on practice exercises. These exercises are simulations of the live solution.
You must be connected to the internet to access the hands-on practice.

Contents

Lesson 1
Transition to myURHR



If you didn't know, myURHR is powered by two modernized and market-leading software programs.

Workday—where you will complete many Human Resources-related actions and UKG—where you will enter time worked, request time off, and, if you're already using UKG for scheduling, view your work schedules.

The Workday platform is a Human Resource and Payroll tool that manages our people information and processes pay. Many of you may already be familiar with Workday as we already use it for financials, procurement, expenses, and some of you may be familiar with UR Student. The nice thing about this, is you only have to log into one of those platforms to be in the overall system so you can move around depending on what you need to do.

Today we'll be looking in the UKG System and focusing on the most common tasks a manager and/or a timekeeper would take.

Terminology

myURHR Terms	Definition
Business Process	Automated workflow used to accomplish tasks in myURHR.
Business Structure	The logical structure of an organization. It contains a hierarchy of locations that contain jobs to which an employee may be assigned.
Exception	A deviation from normal work patterns when employees do not punch as expected. Both excused and unexcused absences appear as exceptions, highlighted with a red border on the timecard.
Control Center	Allows you to view and take action on notifications.
Accruals	A collection of hours earned by an employee. Each type of accrual is assigned a code that collects or holds the different accrual balances, depending on the situation. Vacation, Sick and PTO are typical examples where accrual codes are assigned.
Hyperfind	A query used to group people using certain criteria such as name, primary job, or location.
Dataview / Reports	An online report or view that allows you to analyze data and take actions on a group of employees or organization.
Transfers	You can transfer employee time in the timecard to accommodate changes in shift, work rule, cost center. Every employee has a primary job, which is the derived value for business structure (job), labor categories, and the cost center linked to the business structure. Transfers saved on the employee schedule automatically appear in the timecard.

Terminology

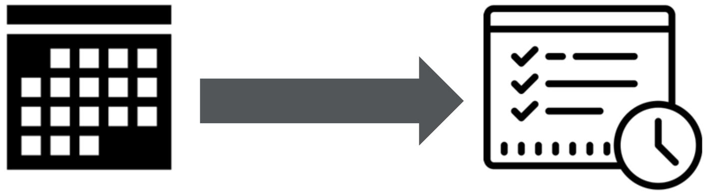
myURHR Terms	Definition
Work Rule	Work rules are used to apply specific pay rules to shifts. Work rules are applied as a transfer at a Clock or within the Timecard. For example, Call-In.
Pay code	Pay codes organize time or money that employees earn and identify spans of time for payroll purposes (vacation for example). When you add a pay code, the time is charged to your primary default work rule unless you change it to a different rule in the transfer column.
Time Off Request	Employees can request time off using the My Accruals tile on the home page. The home page contains the tiles that let the user access or navigate to common tasks, such as Time Off Requests. You can locate time off requests that have been submitted by your employees and take actions such as approve, reject, or delete. You may also add comments or cancel the request on behalf of the employee.
Employee Direct Edits	Allows employees to correct/edit or add time entries to their timecard. Direct timecard entries require Manager/Timekeeper review/approval before the line item will post to the timecard for payroll.
Manager/Timekeeper Approvals	Indicates that the timecard has been reviewed and approved for the entire pay period. Note: Approval “locks” the timecard from employee edit unless removed prior to payroll sign-off.
Sign-off	Once sign-off has occurred, no punches/edits will be accepted by the application to the timecard. Sign-off (performed by Payroll) ‘locks’ the timecard so no further edits can be made while payroll is processed.
Historical Correction	This is an edit that occurs after a timecard has been approved and signed off, typically for a prior payroll period.

Key Changes

Previous State	Current State
Various processes for approving and entering time off requests. Some departments may use email, spreadsheets, or other methods.	When an employee makes a request in UKG, the manager receives a notification. Managers/timekeepers can see their whole team's requests and can review/approve/deny as appropriate, responding within the system.
UKG Dimensions scheduling users enter time off requests in UKG, which then are manually entered in HRMS.	Time off requests will be entered in UKG.
Employees with multiple jobs have a timesheet for each job, so one employee can have multiple timesheets.	Each employee will have one timesheet that covers all of their hours worked. Managers/Timekeepers can only take action on the job(s) they manage.
Managers/timekeepers can filter by pay group or search by individual.	Managers/timekeepers can use hyperfinds to search and create views to filter by role, population, timecards that need approval, etc.
Timekeepers reference the schedule or process forms and manually input FAO overrides into HRMS when employees work outside their home location.	The system sees the business structure transfers on the schedule and, if there is a default FAO (UKG Cost Center) specified, it follows the punches onto the timecard. There is no form or manual input required.
We use exception logs to track missed meal periods and manually enter the information into HRMS.	The employee will be able to indicate a missed meal via the punch tile or clock, eliminating manual exception logs.

Now for some key changes to be aware of.

Key Concept: *"Schedule to Timecard"*



Data flows **from** the Schedule **to** the Timecard

Make changes **in the Schedule**, not the Timecard

9

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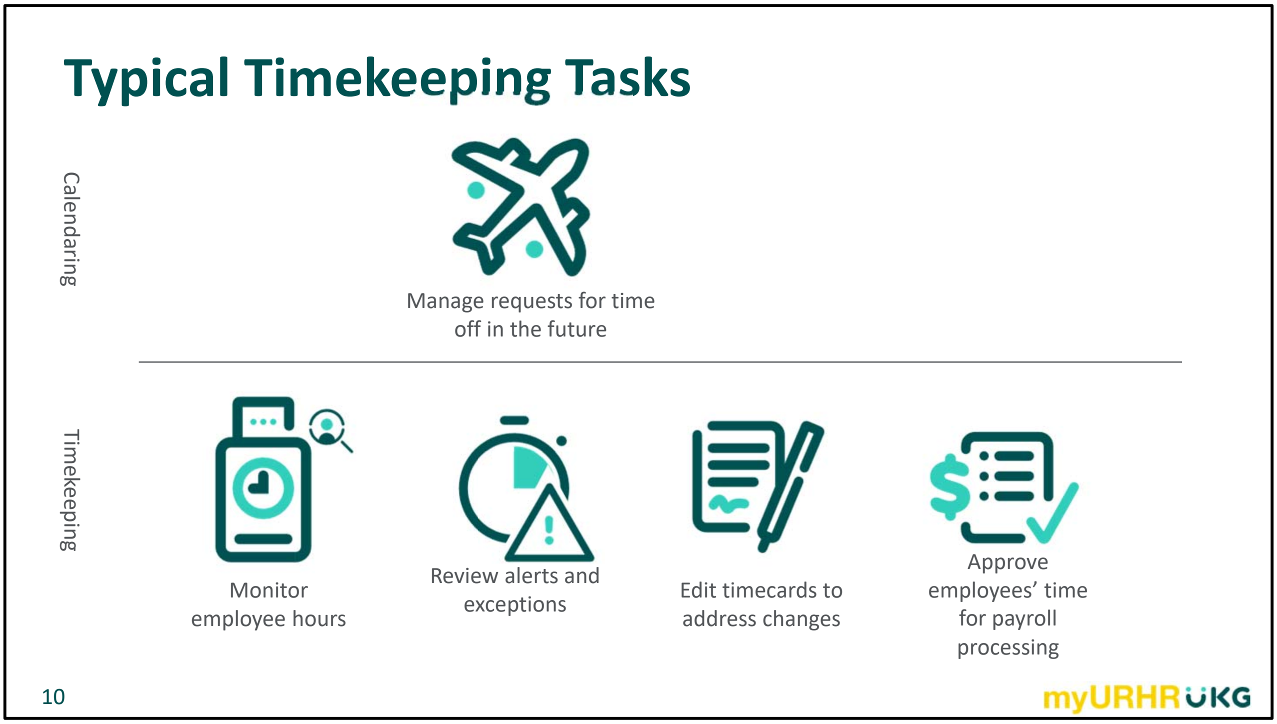
Scott,
An important rule of thumb you will want to be sure to remember: "Schedule to Timecard"

in UKG, data flows FROM the schedule TO the timecard; not the other way around. Always be sure the schedule is up to date so that information gets to the timecard. If you need to make updates/changes, do it in the schedule.



These sample tasks are not all-inclusive and are rarely consecutive.

During this training we will look at a day in the life of a Manager / Timekeeper and see how they:

- Interact with tiles on their home page, and with Dataviews
- Review and take action on notifications in Control Center
- Manage employee requests for time off in the future
- Run a report to review accrual balances
- Edit timecards to address changes
- Approve employees' time for payroll processing

Lesson 2

Navigation & Notifications

11

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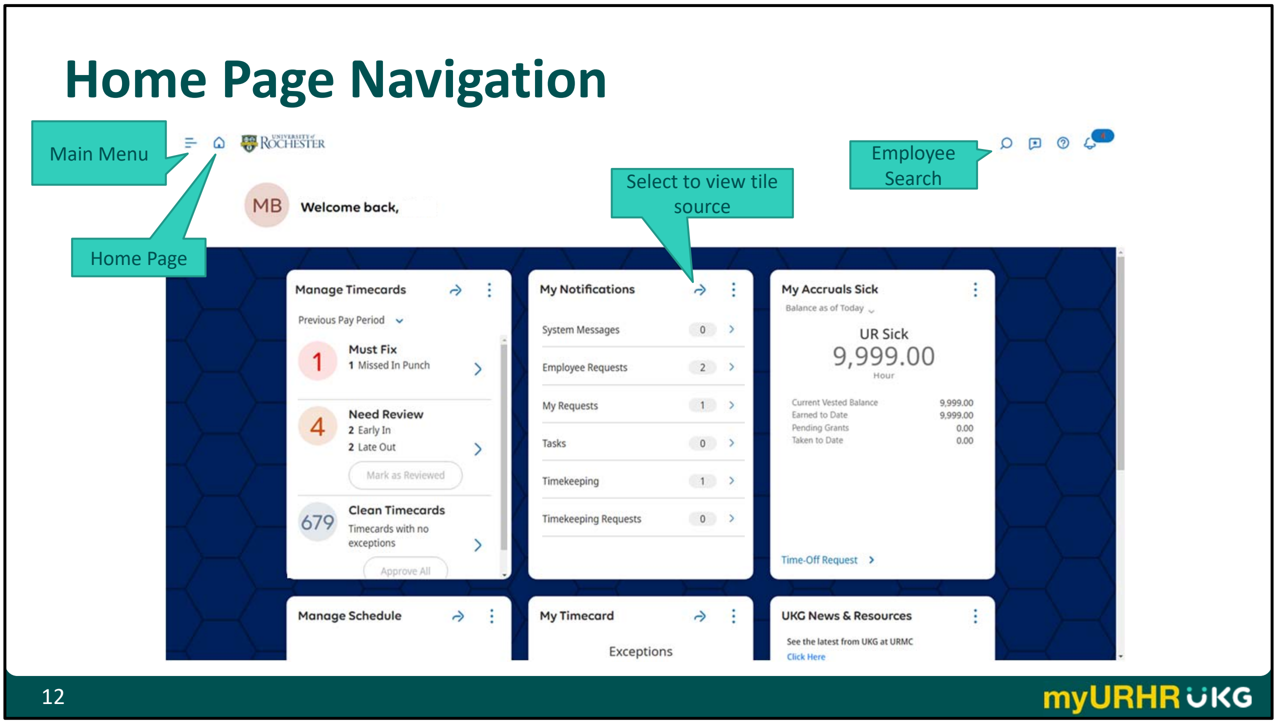
So, now that we have had an overview let’s look at some general navigation.



Once logged in to UKG, your Home page displays.

On the Home page, you can:

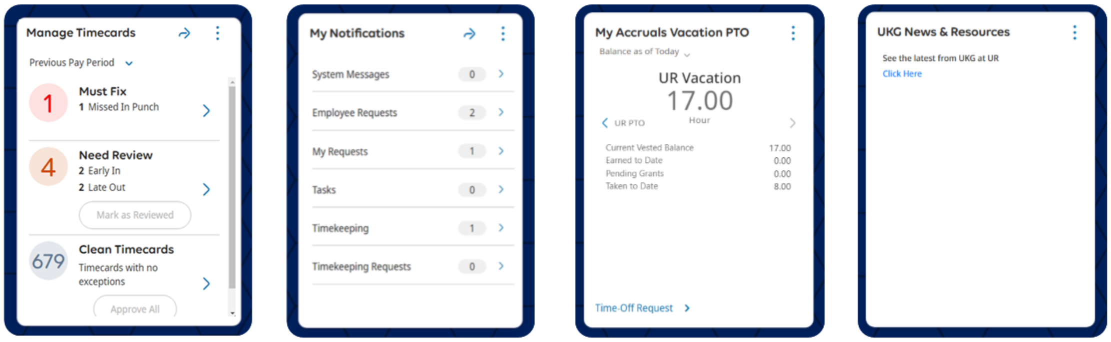
- Take action directly in a tile.
- Use an arrow link in tile to go to the source page for that tile.
- Use the Employee Search feature.
  - For example, you may wish to use the tool to quickly search for a specific employee.
- Open the Main Menu to access other pages.
  - Here is where you can access the Dataviews and Reports libraries.

Note that you can return to the Home Page from any other page by selecting the Home Page icon or UR logo.

To Navigate the Home Page:

1. Use Employee Search.
2. Access another page through a tile.
3. Access another page through the Main Menu.

Home Page Tiles



13 myURHR UKG

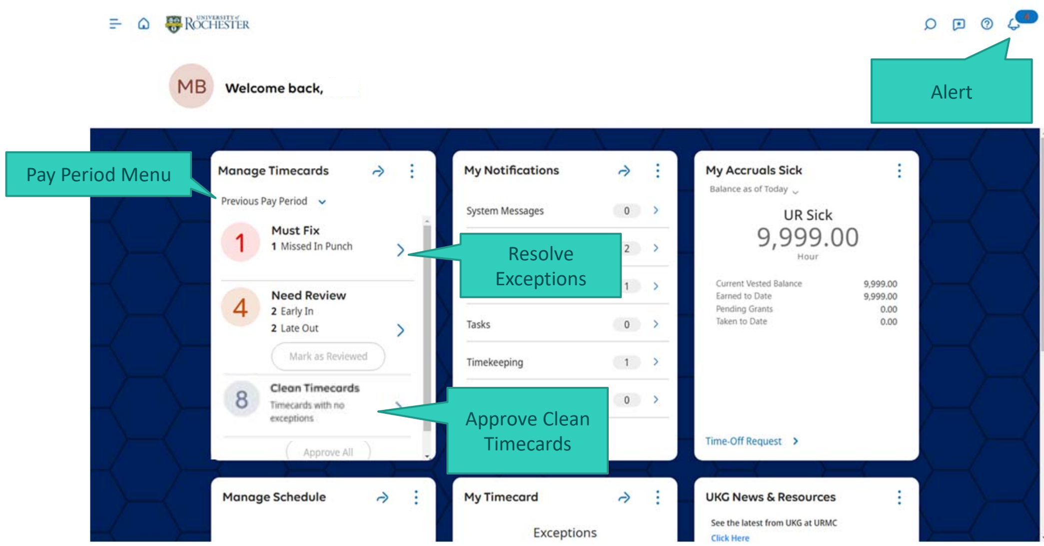
The Home page consists of tiles that provide you with an overview of employee and personal data.

- The Manage Timecard tile on the Home page displays a snapshot of key information including exceptions which require your action.
- The My Notifications tile displays the number of notifications or alerts not yet reviewed or acted on by category. If you are the Reports to Manager, the Employee Requests category will display employee requests for time off.
  - My Requests display notifications regarding your own time off requests.
  - The Timekeeping category displays timecard related exceptions like missed punches.
  - If you are the Reports to Manager, the Timekeeping Requests category displays requests for punches to be added, submitted by an employee.
  - Select a category or the arrow at the top of the tile to display the Control Center for deeper analysis.
- The My Accruals tile displays accrual balances and allows

you to submit a Time Off Request. Use the arrows in the tile to display your balance for each accrual type.

- UKG News and Resource tile displays a link that provides additional training and informational resources related to UKG.

Manage Exceptions Using Manage Timecards Tile



14 myURHR UKG

The Manage Timecards tile displays exceptions broken down by category like Must Fix and Need Review.

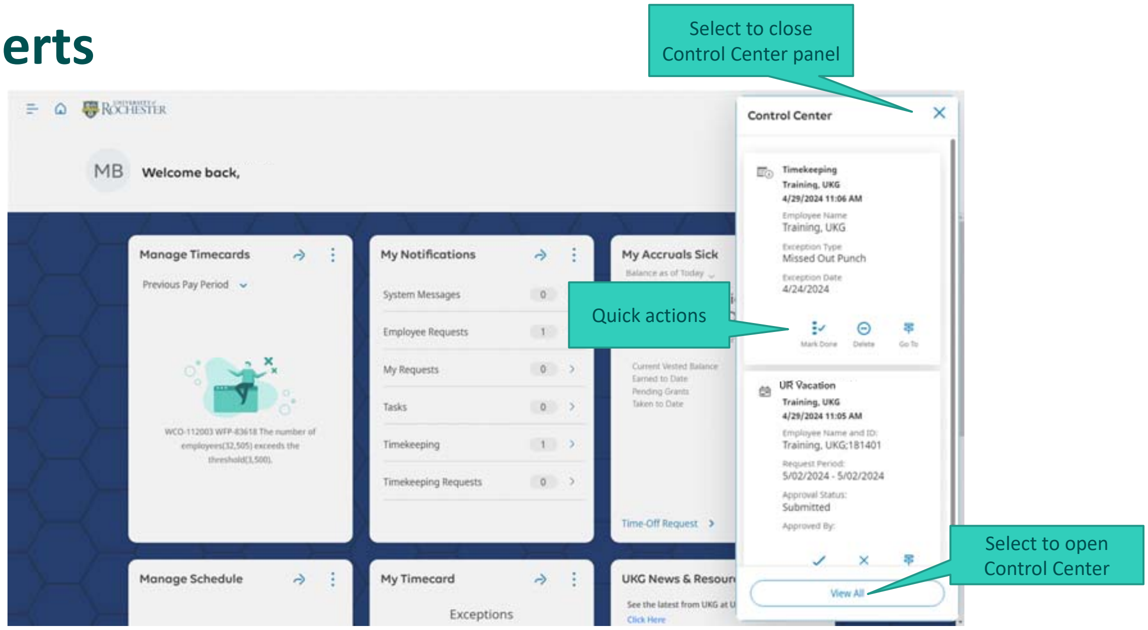
You can adjust the timeframe in the drop-down list at the top.

Select a categories arrow to display its timecards.

Select the arrow at the top of the tile to display all timecards.

Timecards should be reviewed regularly to limit historical corrections. You're also notified of exceptions, along with requests, via the Alert or Notification Bell.

Alerts



15 myURHR UKG

Alerts appear in the corner of all pages. Selecting the bell icon opens the Control Center panel.

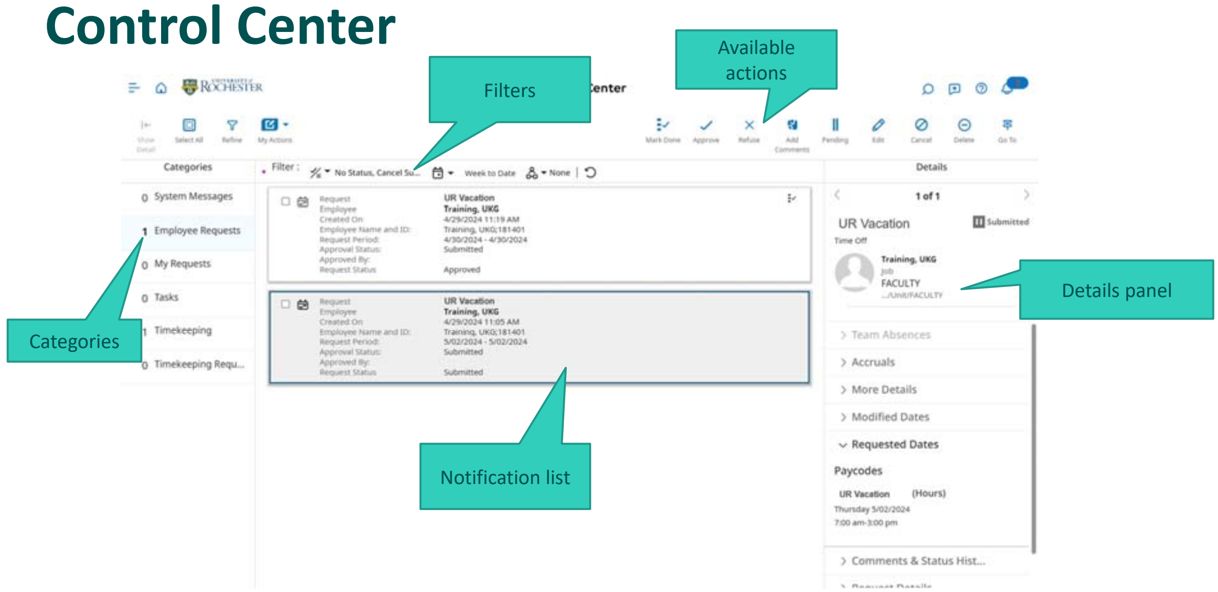
With Alerts, you can:

- View the number of notifications they have not yet reviewed or acted on.
- You can mark individual notifications as reviewed, or take action on appropriate notifications directly from the panel.
  - For example, as a Manager, you can approve a time-off request you have been expecting to receive and approve without reviewing further details.
- By selecting “Go To” you can access the page relevant to a notification.
  - For example, by selecting Go To for an Exceptions notification will immediately open the employee’s timecard with the relevant date and punches displayed.
- Select View All to access Control Center, where they can view notifications by category and in greater detail.

To review alerts in the control center panel:

1. Select the **Notification** icon to access the Control Center panel.
2. Review a missed punch alert and select **Go To** to view an employee’s timecard.
3. Locate the missing punch and enter the correct time.
4. Select **Save**.
5. Select **Mark Read** to remove the notification.

Control Center



16

The Control Center is where you can view notifications in greater detail or to look up notifications that have happened in the past.

With Control Center, you can:

- View notifications by category.
  - Like reviewing the Employee Requests category so you can deal with time off notifications.
- Filter the list of notifications.
  - So that only notifications received on a certain date or dates appear.
- Review the details of the selected notification in the Details panel.
  - For example, you can review any comments or additional information submitted as part of a time-off request or view accrual balances.
- Take action on the selected notification.
  - You can use any of the action icons appearing above the Details column to approve, refuse, or otherwise handle a time-off request.

To review notifications in the control center panel:

1. On the Home page, select the **Notification** icon.
2. Select a notification tile or select **View All** to navigate to the Control Center.
3. Select a notification category and a specific notification to review its details.
4. Act on a notification by selecting an **action** icon.
5. Use the filter options to display additional or fewer notifications.

Email Notifications for Time-Off Requests

Managers will be notified of time-off requests via an email.

You will need to access UKG to review

and respond to the request.

17 myURHR UKG

Managers will be notified of time-off requests via an email. You will need to access UKG to review and respond to the request. Timekeepers will not receive an email notification, but will be able to view and act upon Time Off Requests using the UR Time-Off Request Status or UR Time-Off Request Info, Dataviews. Which we will be covering in the next lesson.

Note: Email notifications cannot be turned on/off at the user level. If you would prefer to have these notifications saved to a specific Outlook folder upon receipt, there is a quick reference card available with instructions. Information on where these materials can be found will be discussed at the end of this class.

Demonstration

Navigation

Access and Navigate the Control Center

18 myURHR UKG

So, there may be some cases you have access to all employees in a department family and you may want to view just a select group of employees.

Hyperfinds are a search tool used to display that group of employees and can be used in Dataviews, Reports and Timecards.

This lesson, will show you how to create Hyperfinds that can be used throughout the application.

Finding Employees: *Locations vs Hyperfinds*

Schedulers | ***Timekeepers***

Use Locations | ***Use Hyperfinds***

20

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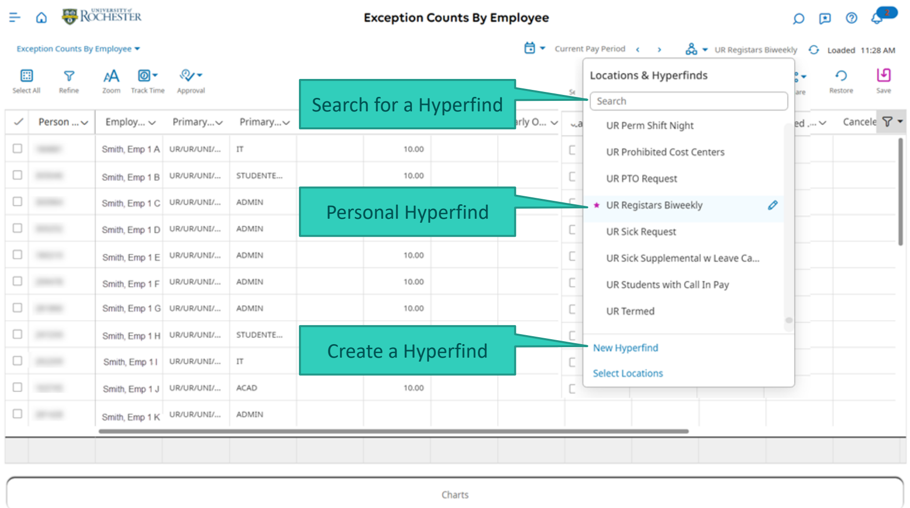
Before we dive into Hyperfinds, I just want to point out a difference when using search queries to view a group of employees. in UKG

Schedulers will use “Locations” to view a particular group of employees (Can filter by Unit, Job, and/or Locations)

Where as, Timekeepers will utilize “Hyperfinds” to view a particular group of employees. (With Hyperfinds there are a lot of ways to run a query and I will cover that in our demo).

Hyperfinds



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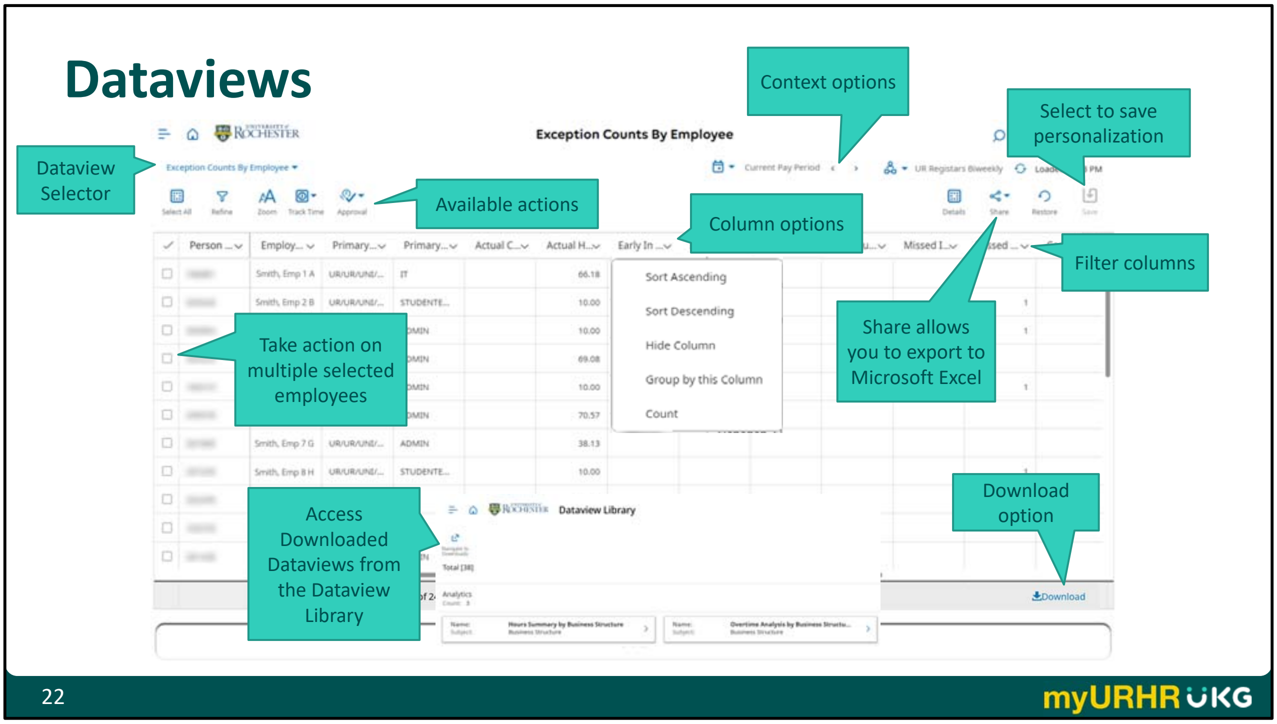
You can Search for an already created Hyperfind or Create a personal Hyperfind by going to the Locations & Hyperfinds list.

To create a Hyperfind select the New Hyperfind link to create your own personal Hyperfind using various search criteria.

Any Hyperfinds that you create will display with a purple star in the list.



As you can see there is a lot you can do using Dataviews:

- Take action on a selected subset of employees.
- Sort and filter a column.
  - For example, you could filter to view only those employees with a specific Primary Job.
- Download a Dataview.
  - If you want to review information in a Dataview that exceeds 1000 records and it takes a longer time to run than expected, you can Download the Dataview and access it at a later time in the Dataview Library (from the Main Menu and select the Navigate to Downloads icon.)

Note you can select Save to keep any personalization that made to a Dataview (or select Restore to go back to the default settings).

The Dataview selector allows you to view a different Dataview, without having to use the Main Menu.

To Navigate a Dataview:

1. Access the **Dataview Library** from the **Main Menu** and select a dataview.
2. Optionally, hide and show columns, sort by a column, group the Dataview by a column or, save the personalized view.

Common Dataviews for Timekeepers

Dataview	
UR Pay Period Close	Review at the end of the pay period for a final review and group approval.
UR Top Overtime	Review for employees with overtime in pay period.
UR Pay Codes by Day	Review for specific pay codes within pay period.
UR Punch Audit	Review for specific punch information.
UR Timecard Change Requests	Review for status or information on submitted, approved, rejected or closed time-off requests.
UR Time-Off Request Status or UR Time-Off Request Info	Review for time-off requests.
UR Exception Counts by Employee	Review the amount of exceptions by employees. This Dataview identified employees requiring timecard edits.
UR Accrual Details	Review for a current listing of employee's accrued time off balances and usage.

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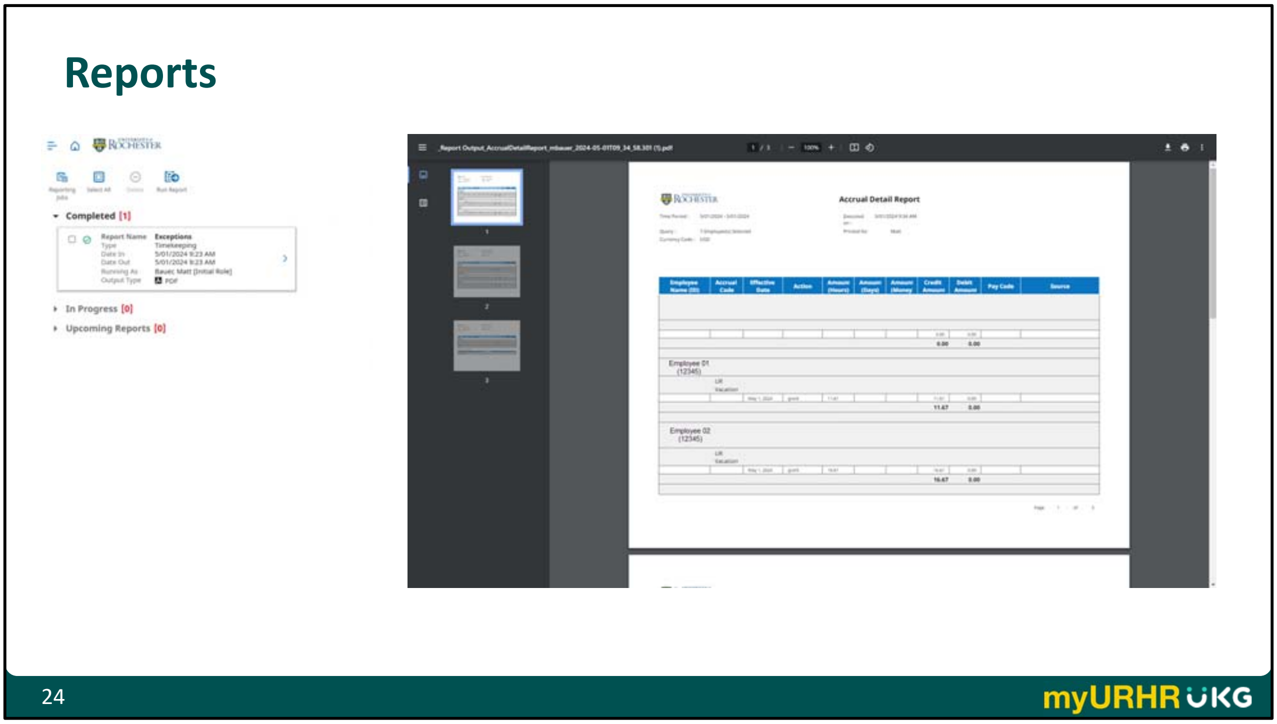
You will probably find Hyperfinds to be especially useful when working with Dataviews.

Dataviews are accessed in the Dataview Library, found in the Dataviews & Reports section of the Main Menu.

You can use Dataviews to review, analyze, and act on vast amounts of data. Listed are some Common Dataviews for UR Timekeepers



You can access the Report Library, in the Main Menu, to see the reports that are available to you.

To Run Reports:

1. Select the report.
2. Select the applicable parameters.
3. Run the report.
4. Save, download, and/or close the report.

Common Reports for Timekeepers

Dataview	
Accrual Detail Report with Running Balances	Review for a current listing of employees accrued time-off balances and usage.
Accrual Reporting Period Summary	Review for a current listing of employees accrued time-off balances and usage.
Employee Hours by Job	Review for details on hours/amounts for specific pay codes by employee.
Time Detail or Time Detail - Assignment	Displays detailed data about each employee's punches, duration, and pay code edits. Summary data is displayed per employee, totaling time and money by pay code.
Timecard and Punch Audit	Displays an exportable record of paycode and punches from the timecard with audit information on the entry/revision dates and/or source of the entry. This information is also visible on the audit tab of the timecard.

Managers/Timekeepers can run several reports that provide them with important information that helps them monitor tasks.

Listed are several reports that may be useful.

For example, you can run the Accrual Details report to review accrual balances, credits and debits.

Demonstrations

Hyperfinds (Video)

Navigate Dataview

Generate Reports

- Now we will look at how Timekeepers will prepare timecards for payroll by:

  Reviewing Timecards
  Address timecard exceptions
  Meal overrides
  Non-worked hours
  Apply Job Assignment updates, Work Rule and Cost Center Transfers.
  Approvals
  Apply Historical Corrections.
  Delegations

HR and Leave Policy Reference

HR Polices https://www.rochester.edu/human-resources/hr-policies/

Leave Administration https://www.rochester.edu/human-resources/benefits/leave-disability/

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Before we begin this lesson, let's take a minute to reference the institution's HR and Leave Policies . Note, policies will be revised for go-live.

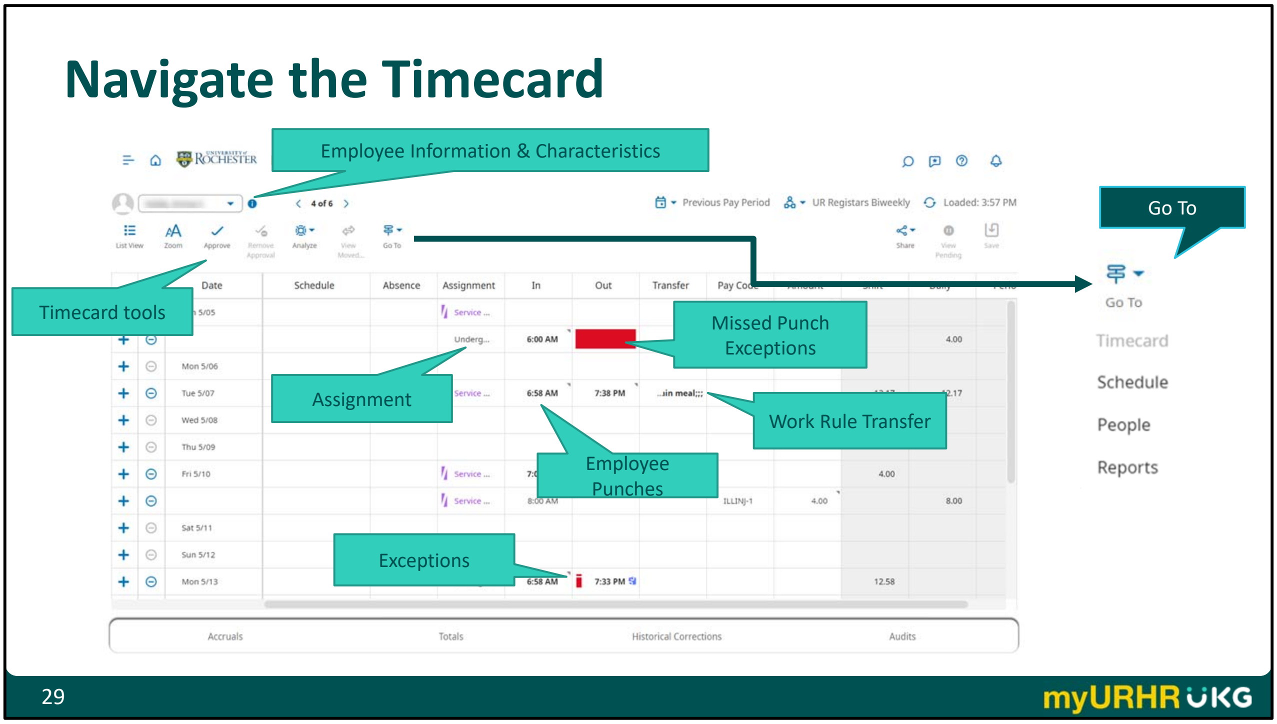
If unfamiliar with these, take some time to review them after class. Find all of the University's Human Resources policies below, sorted by topic. You can also search for policies by number or keyword on the **University's Policies website.**

Common HR Policy topics include:

- **Time away from work**
- **Wage and compensation**
- **Employment and staffing**
- **General personnel and administrative policies**

Some Leave topics include:

- **Short-Term Disability** - Provides part or all of your basic salary when you are absent from work due to a non-work-related illness or injury.
- **Paid Sick Leave** - Allows for protected time away for all employees, including using these days for qualified family members.
- **Workers' Compensation (WC)** - Provides employees injured on the job with wage reimbursement and payments for medical ca
- **Return to Work (RTW) Program** - Empowering employees with transition plans for returning to the workforce after a leave.
- **Long-Term Disability** - Provides a monthly income benefit when you are totally disabled for more than six months.
- **Family Medical Leave (FMLA)** - Gives eligible employees up to 12 weeks off, unpaid, during a 12-month period.
- **Paid Family Leave (PFL)** - Gives eligible New York State employees paid time off to care for their qualifying loved ones.



The Employee Timecards page includes timecards selected from the Employee Summary page or from the main menu or selected Hyperfind.

The timecard displays punch in and out times, and any exceptions which are deviations.

Common exceptions are missed punch and cancel deductions.

****(only for Adv Sch group) - Departments with employees using Advanced Scheduler will also have late and early punch exceptions.

The Go To option allows you to navigate to other areas of UKG for the selected employee.

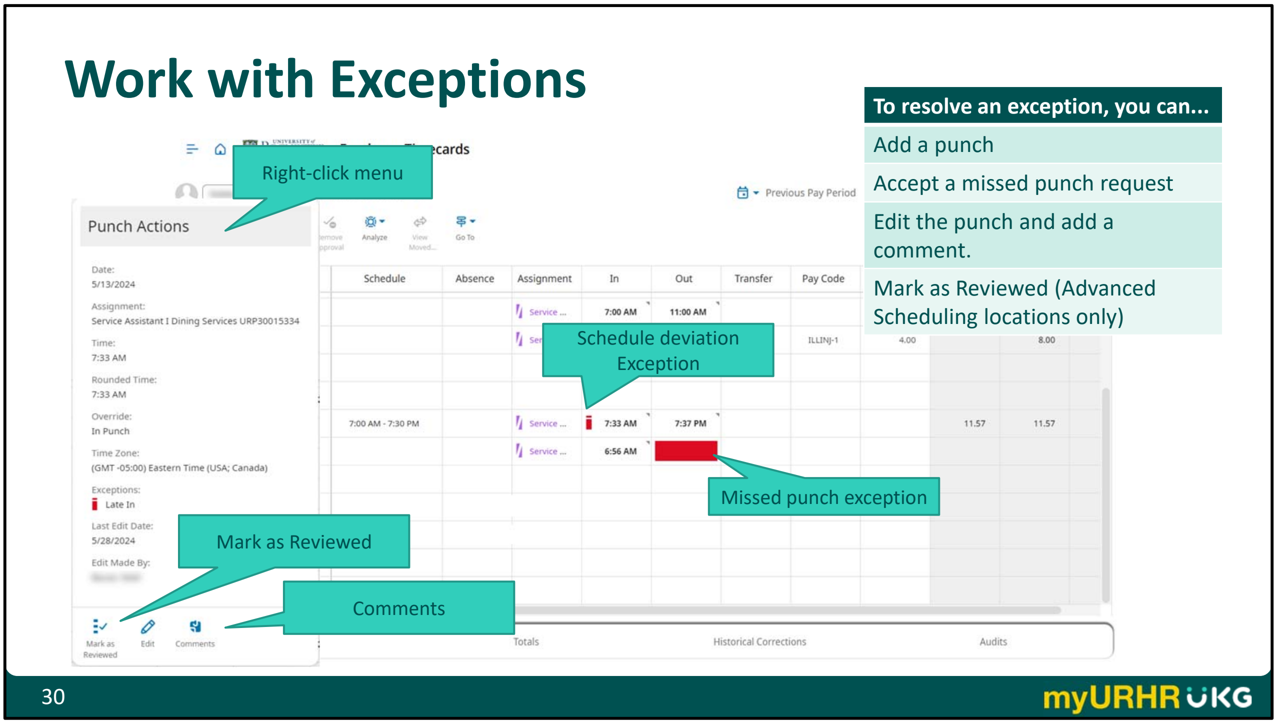
The Assignment column displays the job the employee worked.

The Transfer column displays Cost Centers and Work Rules updates.

A Work Rule transfer example would be on-call.

Assignment and transfers are applied by the employee when punching in for their shift.

The circle is next to the employee drop down will provide additional information and characteristics about the employee and can be valuable for providing context and information to make appropriate edits.



Missed punches and canceled meal deductions are considered exceptions.

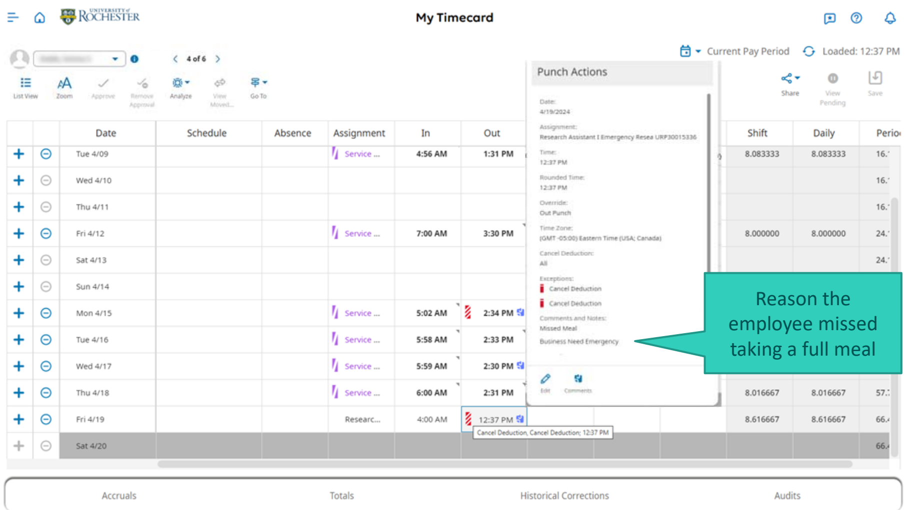
As exceptions appear in employee timecards, a Manager/Timekeeper may be expected to resolve those exceptions by adding a punch, accepting a missed punch request, add a comment, and marking the exceptions as reviewed.

****(only for Adv Sch group) -** Advanced scheduling locations will also be able to track schedule deviation exceptions. For example, if an employee is scheduled to work from 7:00 a.m. to 7:30 p.m., but arrives late for work at 7:30 a.m., an exception is be generated.

To Review Exceptions and Add Comments:

1. Access the timecard and review the exception.
2. Right-click the cell with the exception and select **Comments**.
3. Select a comment and (optionally) type a note.
4. Select **Apply**.
5. Right-click the cell with the exception and select **Mark as Reviewed**.
6. Select **Save**.

Punch Expectations Attestation



If an employee was unable to take their full default meal, they will record the reason when punching out.

In New York State, employees who work a shift of six hours or more are entitled to a 30 minute meal break. In the event that an employee missed taking a meal break, the circumstances that prevented them from taking their meal break should be discussed with their manager to ensure that they receive their meal break in future.

When an employee records a full meal break was not taken, a Canceled Deductions exception displays in the timecard. To review the reason provided by the employee, right-click on the punch and review the section below Comments and Notes.

If the selected comment was Other Reasons then the employee is to enter a free text note. Timecards should be reviewed regularly to limit historical corrections.

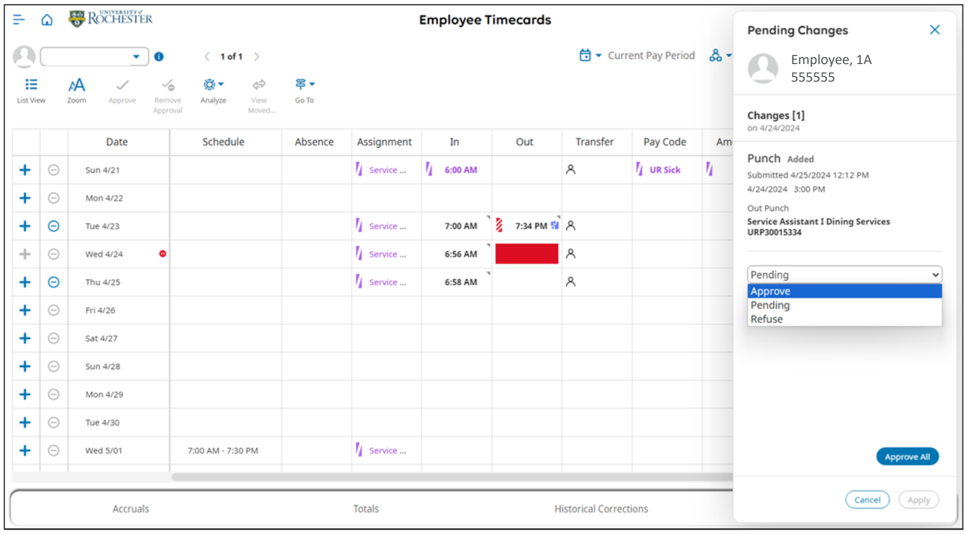
It's important to note If an employee intends to be away mid-shift for longer than their standard meal period, they should clock out when they leave for their break and clock back in when they return.

If the break was less than 60 minutes and was their intended meal period, they should coordinate with you (as Manager/Timekeeper) to manually cancel the auto meal deduction.

If the employee will take their meal later in addition to this break, no additional action is needed by Manager/Timekeeper.

When we review how to cancel a meal deduction, we will discuss a few scenarios that may require the auto meal deduction to be cancelled or added back.

Missed Punch Correction



NOTE: employee direct edits / change requests not approved by a Manager/Timekeeper before the end of the pay period processing will be rejected by Payroll.

They must be resubmitted by the Timekeeper in the next pay period as a historical correction.

32

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Employees will be able to directly submit timecard entries and/or changes until the pay period closes as a pending request.

Managers will receive a notification of the change or entry in the control center and Timekeepers can view pending requests in the UR Timecard Change Requests Dataview that require action. On the right, a panel will also appear when navigating to an employee timecard that contains a pending change request (as shown on the slide).

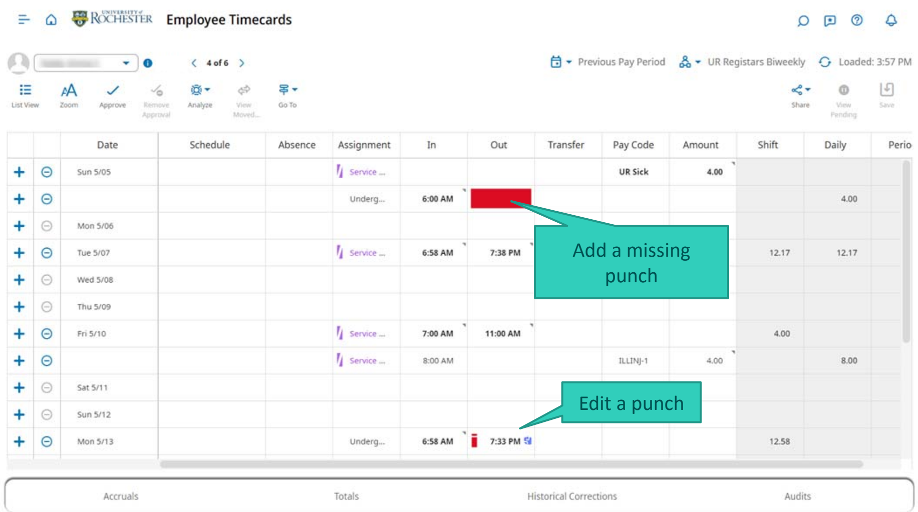
Change Requests can be approved or refused as appropriate.

It's important to note that employee direct edits / change requests that are not approved by a Manager/Timekeeper before the end of the pay period processing will be rejected by Payroll and must be resubmitted by the Timekeeper in the next pay period as a historical correction.

Change requests (like missed punch employee corrections) can be reviewed and approved as individual transactions throughout the period.

The change request will not "post" to the employee's timecard until it has been approved. If the request is refused, the employee will receive a notification in their control center.

Hourly Timecards: Adding and Editing Punches



33 myURHR UKG

Manager/Timekeepers can:

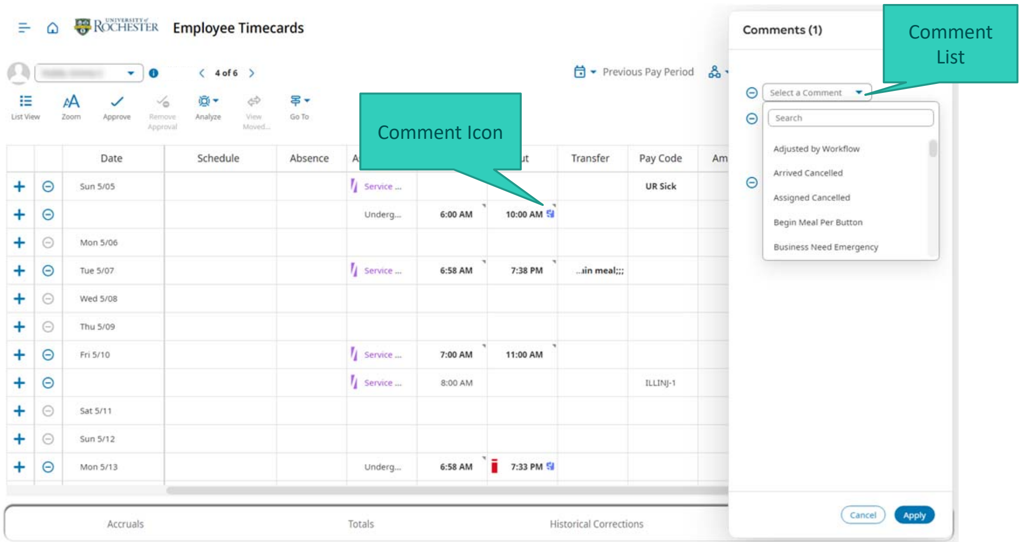
- Add a missing punch by selecting a cell and entering the applicable time.

- Edit an existing punch by selecting a cell and making the applicable edits.
    - Note this is typically done to cancel a meal deduction for an employee that did not take their full meal period and did not record it correctly when punching out for their shift.

- Delete a single punch by selecting the applicable punch and pressing Delete on your keyboard.
    - For example, an employee punched out by mistake and then returned to work.

Timecards should be reviewed regularly to limit historical corrections.

Add and Delete Comments



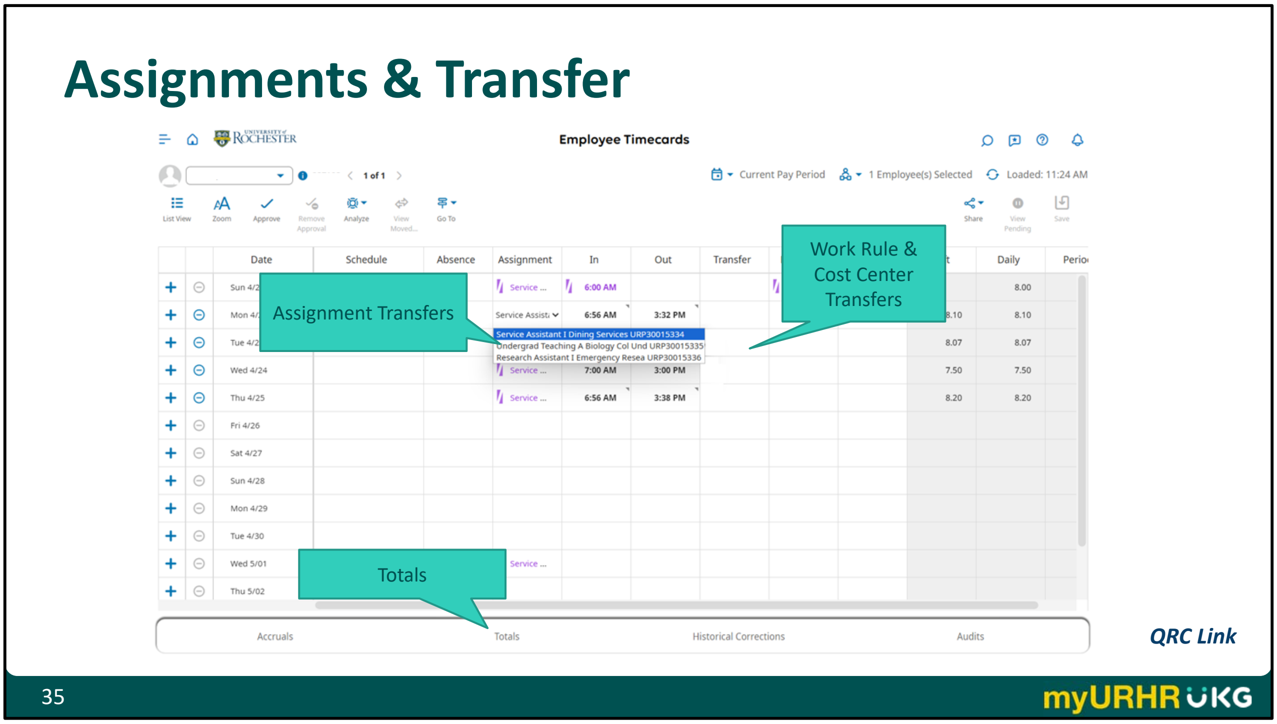
It is recommended that any time you edit a timecard, you add a comment in the cell that contains the edit for record-keeping purposes.

You can also add comments to exceptions and punches, if appropriate.

Comments can be edited and deleted.

To Add Punches and Comments to an Employee's Timecard:

1. Access the employee's timecard for the pay period.
2. Add the missing punch to the timecard and add a comment explaining the edit.
3. Select **Save**.
4. Review the employee's totals for the pay period in the Totals tab.



Transfers are applied when an employee is not performing in their primary job or their time needs to be tracked and possibly calculated and paid differently.

Three types of transfers can be applied: **Assignment, Work Rule and Cost Center**.

- **Assignment transfers**, or HR Job Assignments, are applied when an employee is working in their non-primary job. Non-Primary (or additional) job assignments only exist when the job is an ongoing work assignment recorded as a position HR System.
  - If an employee is picking up an additional scheduled shift in another Department within one of their current assignments, this will be reflected as a Business Structure Transfer. **This is typically employed through Advanced Scheduler**.

- **Work Rule transfers** are typically applied when an employee is called in.

  - If the employee selected one of the call-in buttons on the Clock or Punch tile, the transfer field will be prepopulated and will often not require a manual transfer by the Timekeeper/Manager.

- There are some locations that may have additional instructions when transferring to a "regular" shift after on-call. Review the QRC for additional details.

- Select the "i" next to the employee’s name to display additional to help identify the correct call in work rule (based on meal default, day breaker, and/or employee type (ex. union/student)).

- **Cost Center Transfers** are applied when an employee’s hours require a FAO (Financial Account Override).

There may be instances when more than one transfer type is applied to an employee’s shift.

There are scenarios where individuals transfer to a secondary assignment with no in/out punch or break in shift or to a new work rule (ex. Call-in While on Call). This can be executed directly in the timecard

a. Note the value in the outpunch field, delete out punch on first row; insert new row (select assignment (if applicable) enter in punch (prior line's original out punch), out punch and select work rule (if applicable) and tab out of the field. This will create a system generated outpunch in purple so there is no gap between activity.

b. When reviewing the totals generated by the work rule transfer - you may need to look on daily values generated on the day of and day after to see the full impact. If a minimum hours amount, pushes the validation of the shift over the employee's day divide, the amounts earned will be allocated based on the day it was "earned". Ex. Call-in has a minimum guarantee of 4 hours. Employee punches in at 11PM & out at 12A and has a 12A day divide. The 4 hour minimum window is 11P (in punch) + 4hours. Therefore, 1 hour (12a - 11P) of their minimum guarantee will be allocated to day of in-punch and 3 hours (3A-12A) to the 2nd day.

If you also have employees with one of the following scenarios, refer to the

Quick Reference Card for additional steps to ensure proper payment:

a. If employee transfers to Call-in at the clock or you apply the work rule transfer in the application AND has < 60 minutes (i.e. a short break) between multiple shifts. It may be required to "break" the continuous shift methodology by applying a new shift override. This will ensure the appropriate minimum and premiums are applied.
b. BU1 & BU3 employees that need to transfer to their Regular shift from a Call-in or Call-in Early Shift

To Perform an **Assignment Transfer**:

1. Access the employee's timecard.
2. Select the **Assignment** cell for the appropriate date and select and entry.
3. Select **Save**.
4. Review the employee's totals for the pay period in the **Totals**.

To Perform a **Work Rule and Cost Center Transfer**:

1. Access the employee's timecard.
2. On the row reflecting the shift or pay code you want to add a work rule or cost center, **navigate** to the "Transfer" column
3. Click **Search** and a pop-up will display on the right.
4. **Choose** the appropriate transfer type: "Add Work Rule" or "Add Cost Center," and then select the appropriate entry
5. Select **Apply**.
6. Select **Save**.
7. Review the employee's totals for the pay period in the **Totals** tab.

Demonstrations

Missed Punches

Add Punches and Comments

Assignments & Transfers

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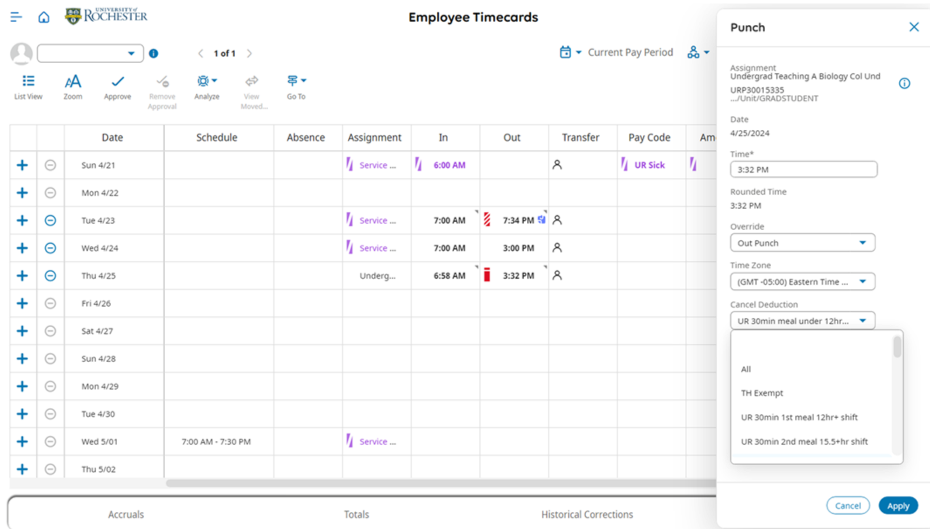
So, there may be some cases you have access to all employees in a department family and you may want to view just a select group of employees.

Hyperfinds are a search tool used to display that group of employees and can be used in Dataviews, Reports and Timecards.

This lesson, will show you how to create Hyperfinds that can be used throughout the application.

Cancel Meal Deduction



38 myURHR UKG

When an employee works through their meal break they have the ability to cancel the automatic deduction when ending their shift at the clock. If the employee fails to cancel their deduction at the clock, you would do it on their behalf.

Timecards should be reviewed regularly to ensure employees are paid properly in a timely fashion and limit historical corrections.

There also may be scenarios in the application that may necessitate the cancellation of the automatic deduction due to shift definitions.

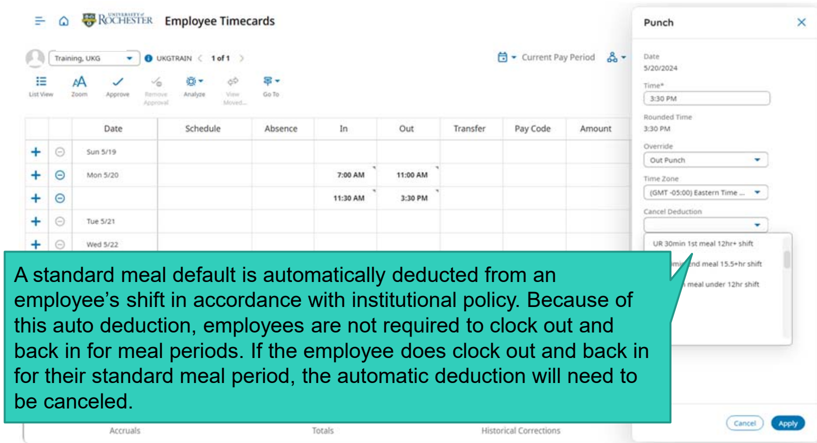
A continuous shift in the application is defined as worked time that does not include a break exceeding 60 minutes.

In other words, an In and Out Punch followed by an In Punch less than one hour later, and it's corresponding out punch, would be considered the same shift.

This definition is applied to a variety of functions in the application including such things as Shift Differentials, Meal Deductions, Breaks, and Work Rule transfers (like Call-in).

Let's review 3 scenarios around meal punches and how they can affect meal deductions.

Cancel Meal Deduction Scenario: Employee Clocks Out for Standard Meal Period Length

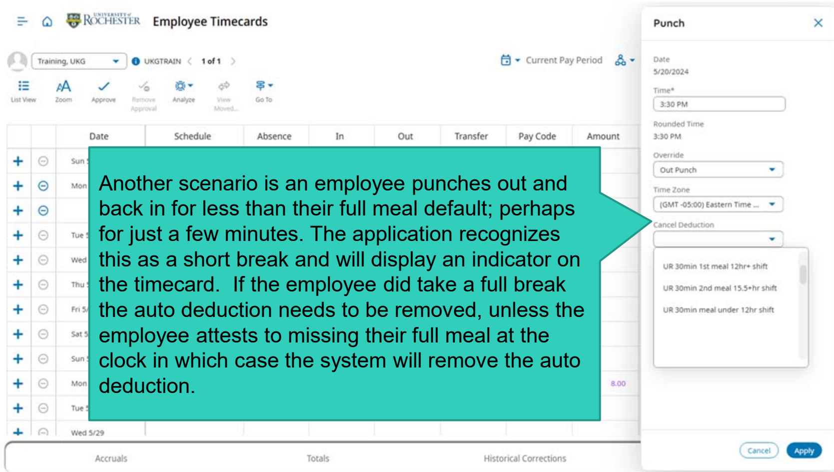


A standard meal default is automatically deducted from an employee's shift in accordance with institutional policy.

Because of this auto deduction, employees are not required to clock out and back in for meal periods.

If the employee does clock out and back in for their standard meal period, the automatic deduction will need to be canceled.

Cancel Meal Deduction Scenario: Short Break



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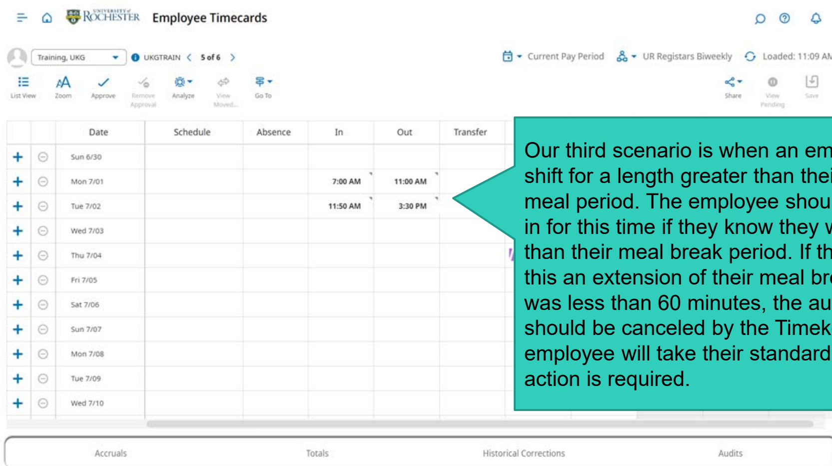
Another scenario is an employee punches out and back in for less than their full meal default; perhaps for just a few minutes.

The application recognizes this as a short break and will display an indicator on the timecard.

If the employee did take a full break the auto deduction needs to be removed, unless the employee attests to missing their full meal at the clock in which case the system will remove the auto deduction.

Cancel Meal Deduction Scenario: Employee Clocks Out for a Length Less than 60 Minutes



Our third scenario is when an employee is away mid-shift for a length greater than their standard default meal period. The employee should clock out and back in for this time if they know they will be away for longer than their meal break period. If the employee considers this an extension of their meal break, and the break was less than 60 minutes, the auto meal deduction should be canceled by the Timekeeper/Manager. If the employee will take their standard meal period later, no action is required.

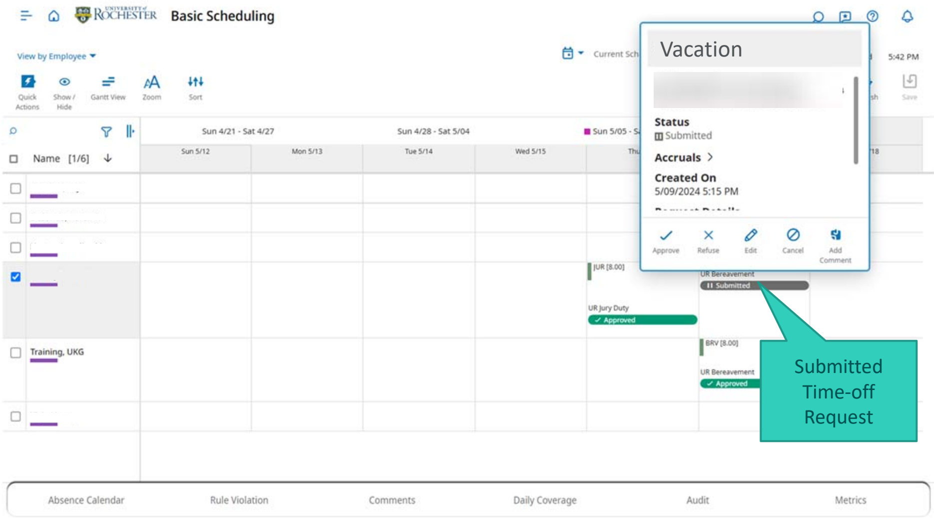
Our third scenario is when an employee is away mid-shift for a length greater than their standard default meal period.

The employee should clock out and back in for this time if they know they will be away for longer than their meal break period.

If the employee considers this an extension of their meal break, and the break was less than 60 minutes, the auto meal deduction should be canceled by the Timekeeper/Manager.

If the employee will take their standard meal period later, no action is required.

Approve Time-Off Requests



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When an employee submits a Time Off Request in the application, Managers are notified of the request via email, or in the Time Off Requests Info Dataview, or with a notification in the control center.

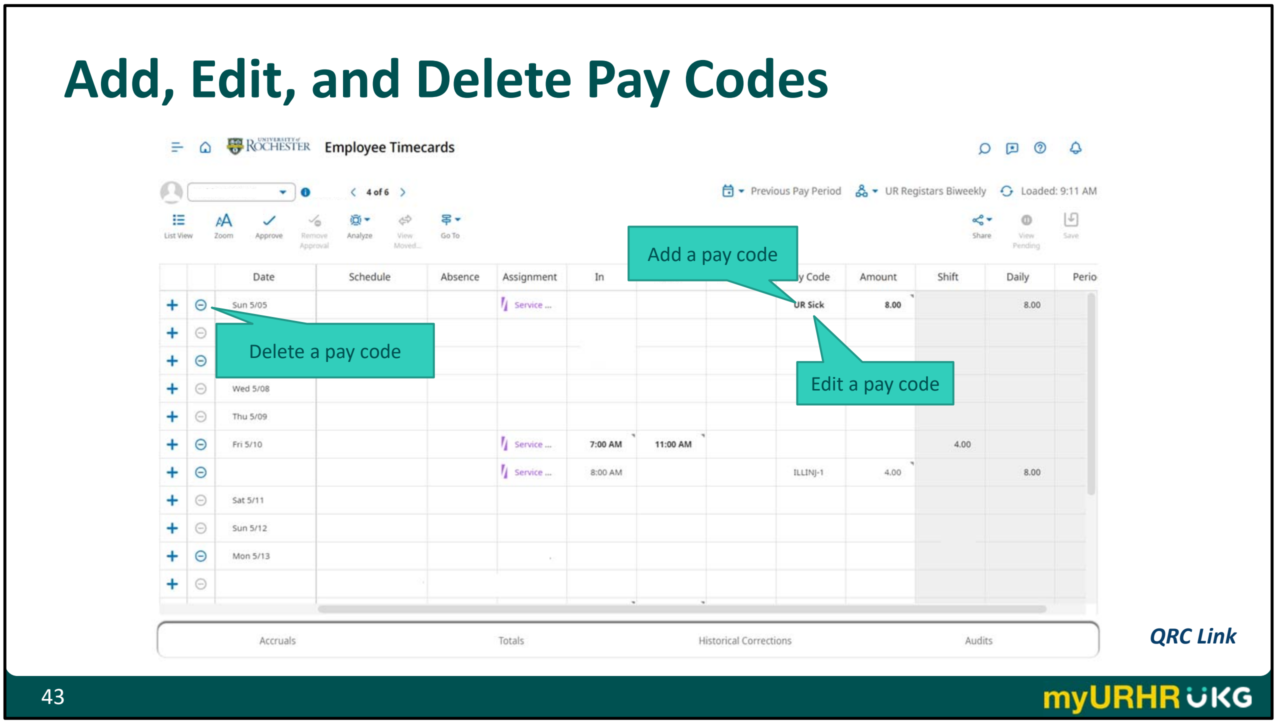
Timekeepers will not receive an email notification or see it in their notifications, but can review the requests in the Time Off Request Info Dataview.

Unless requested by the Employee's Reports to Manager, Timekeepers will only approve time off requests at the end of a pay period when it would prevent the employee from being paid for those days.

You can evaluate the request further and apply your approval in the Schedule. Once a response is provided, the employee is notified. If approved, time off is added to the schedule, and flows automatically to the timecard, to be paid in the appropriate timecard.

Before making direct time-off pay code edits in the timecard (ex. Vacation, Sick, PTO, etc.), it's best practice to review the schedule, control center notifications (reports to managers) or the Time Off Request Info Dataview for any submitted (i.e. pending) requests. This will ensure the employee is fully notified of the status of their request if it was submitted via the Time-off Workflow.

If the employee didn't submit a request and a direct pay code edit is needed for an out of office (ex. Sick Day), we'll cover that in our next slide on adding pay codes.



Using pay codes:

- Add a pay code to establish a different pay type for worked or non-worked hours.

Note: Pay codes cannot be added to a row with punches. If both are needed on the same day, add a row for that day to enter the pay code information.

  - For example, a Sick pay code indicates that the employee was sick during their shift and was unable to work for the defined amount of hours.

- Edit an existing pay code by selecting and updating the existing pay code using the Pay code drop-down list.

- Delete a row with a pay code by selecting the Delete icon.

Note: If you are adding a time-off pay code directly, it's important to understand that

UR Sick, UR Vacation, and UR PTO are cascading pay codes.

The system will dynamically review the available accrual balance for the day and based on the amount entered will determine if the full amount is available for use. Ex. If only 4 hours remain in the Sick Accrual bank and 8 hours is entered for the day. The totals tab will show 4 hours of UR Sick and 4 hours of Sick Unpaid hours.

Note: The system rounds all entries to the nearest equivalent hours : minutes decimal equivalent (include the QRC).

When you enter a decimal based number in the amount column the system will always be looking to ensure that it matches the closest Hour/Minute value. So, it may automatically adjust the entry to "fit" if you've entered something that doesn't fit within those parameters. This is a time and labor system - so behind the scenes it's always operating in time-based values (hours/minutes).

For example:

- Type in: 0.04 – it will change to .03 because .04 is not even # of minutes. It's between 2 and 3 minutes. Since we don't calculate to the second – it's going to adjust to be 2 minutes or .03

- Type in 0.3 = no change = 18 minutes

To Add a Pay Code to Excuse an Absence:

1. View the employee’s accrual balance.
2. Select the **Pay Code** list and select a code.

3. Select the **Amount** cell and enter an hours amount.
4. Add a comment to the pay code.
5. Select **save**.
6. Review the employee's totals for the time period.

Leave Administration & Timekeeping

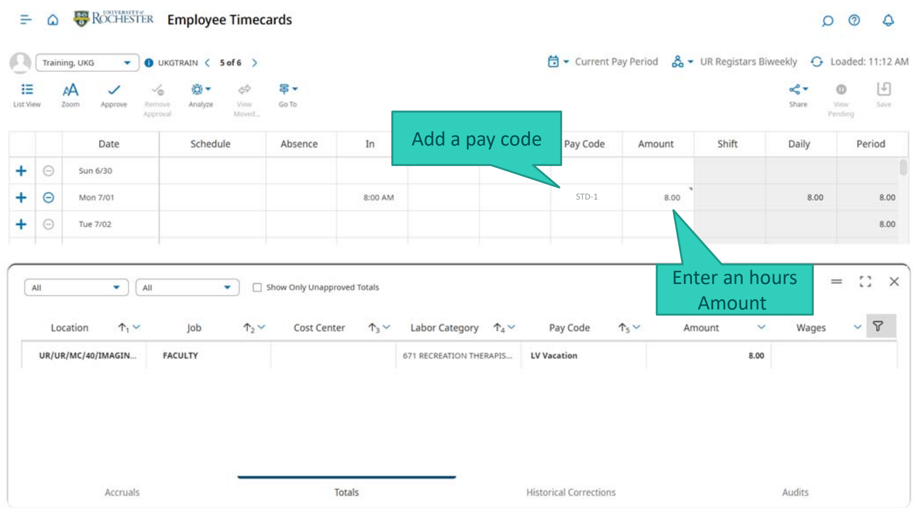
- When Leave Administration approves a leave of absence (ex Short-Term Disability or Paid Family Leave) the time will show on the timecard and be seen in the schedule
- For leaves taken in continuous blocks of time, timekeepers will not edit the time codes. Leave administration will manage the leave period including supplemental time through standardized supplemental rules.
- For intermittent leaves such as Paid Family Leave, timekeepers will add the standard daily hours to the appropriate pay code as well as the appropriate accrual code to supplement their time. The codes during leave will appear in the drop down starting with 'LV'. This identifies the time as supplementing a leave.

When it comes to Leave, some tasks are managed by Leave Administration.

Leave Administration processing will:
- Approve a leave of absence, showing this time on the timecard.
- For leave periods in continuous blocks of time, they will manage the leave period including supplemental time through standardized supplemental rules

The Timekeeper will process:
- Timekeepers will add the appropriate pay code and accrual code to supplement the leave using special codes starting with "LV" for Intermittent Leaves.

Leave



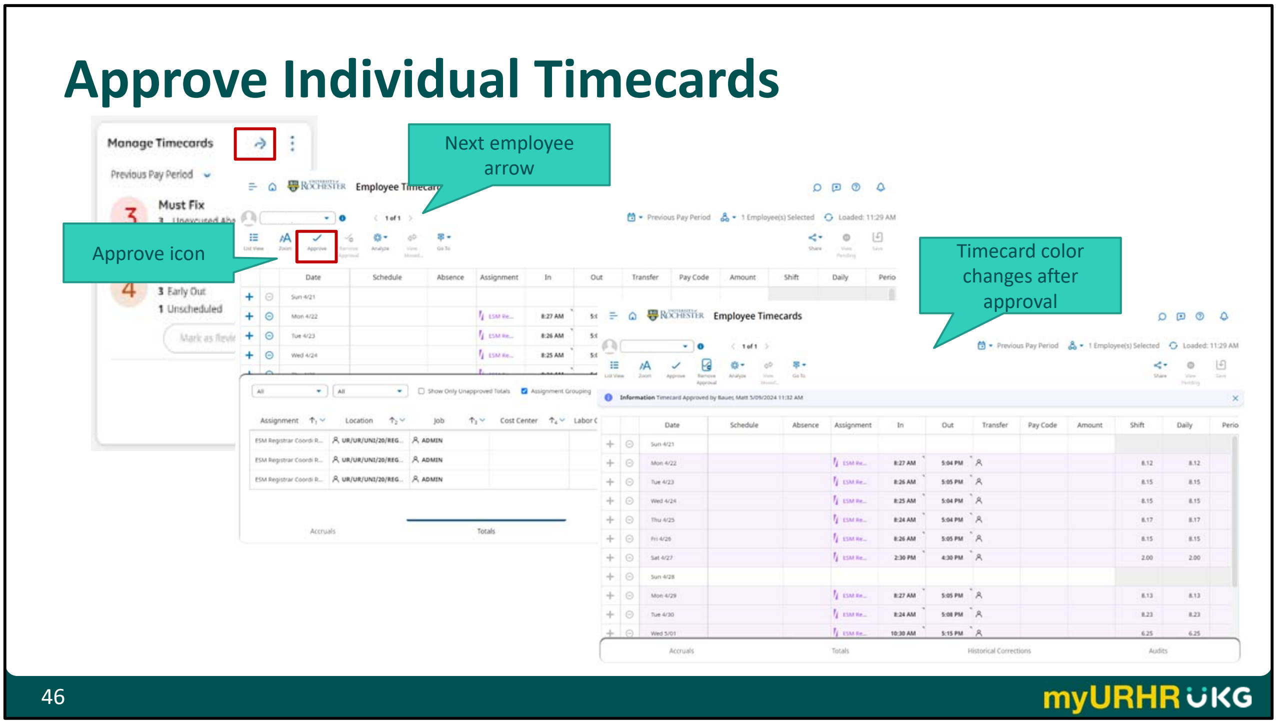
Intermittent leave is entered in the employee's timecard in same fashion you would enter any other pay code you would select the appropriate leave option in the Pay Code dropdown list. Leave options are only displayed for employees who have an approved leave in the displayed timeframe.

In this example this paycode of "STD-1" is an example of an illness and Injury related to a disability.

If options do not appear, contact HR Leave Administration.

To Add Leave:

1. Access the employee's timecard
2. Select the appropriate date's **Pay Code** cell. The Leave options will display at the top of the pay code list.
3. Select the **Amount** cell and enter an hours amount. **Note**: The hours value entered in the amount field should be equal to the employee's daily standard hours (i.e. Weekly standard hours / 5).
4. Select **Save**.
5. Review the employee's totals for the time period. **Note**: The totals tab will display the appropriate breakdown of hours automatically based on the characteristics of the employee's leave and available accrual balances.



After the pay period has ended and all edits have been completed, the timecard should be approved.

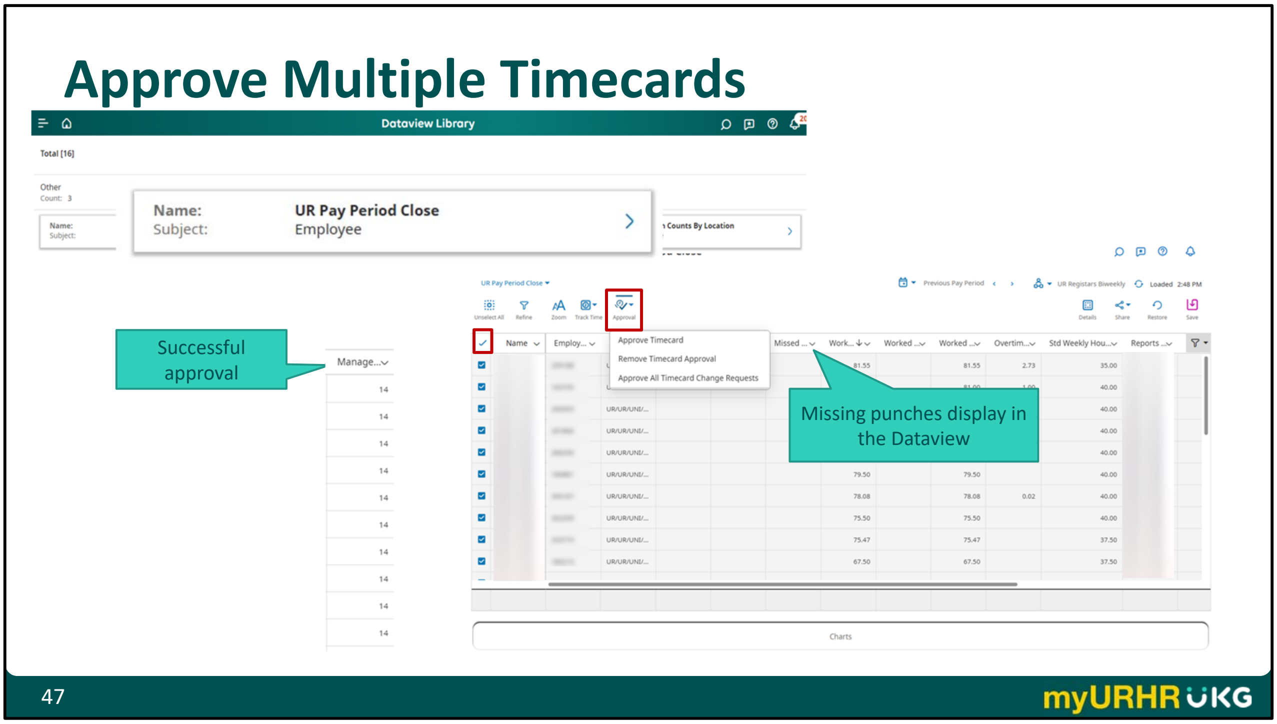
While edits can & should be made throughout the period, the timecard is best approved just prior to pay period end to allow for manager, timekeepers or the employee to adjust time if needed. Approving the timecard will "lock/close" the timecard to employee entries (such as clock punches, punch tile and direct employee edits).

Managers/Timekeepers can approve timecards individually or in a group.

For example, at the end of the pay period, you can access the timecard for one employee. After addressing any timecard errors/exceptions, you can approve the timecard. After submitting approval, the timecard changes color. Gray crosshatch indicates the timecard has been sign-off by Payroll and the pay period has closed.

To Approve an Individual Employee Timecard:

1. Access one or more employee’s timecards.
2. Display the time period to be approved. **Note**: Make sure you evaluating the correct pay period or enter the desired date range in the calendar drop-down.
3. Select the employee’s name.
4. Select **Totals**.
5. Select **Approve**.



Timecards can be approved as a group.

Access the UR Pay Period Close Dataview to review exceptions, select the employees to include in the group approval and approve multiple timecards.

When applying your approval, UKG will only approve records that have hours charged to Assignments you manage.

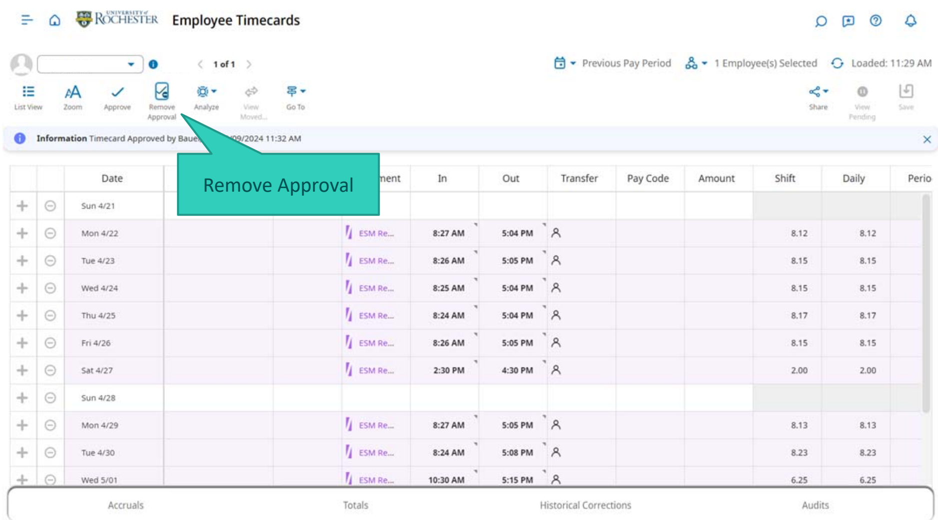
You may find it helpful to create/save a hyperfind that displays employees that share the same pay frequency. If an employee has worked in Assignment outside the department family, UKG will not accept your approval. The other department family manager will need to apply their approval.

The Manager Approval Count column displays the number of days approved in the selected timeframe.

To Approve Employee Timecards (Group):

1. Access the **UR pay Period Close** Dataview.
2. Select your Hyperfind Query that displays your direct reports.
3. Display the timeperiod to be approved.
4. Review missing punches and timecard totals.
5. Choose **Select all**.
6. Select **Approve**.

Removing Approvals



48

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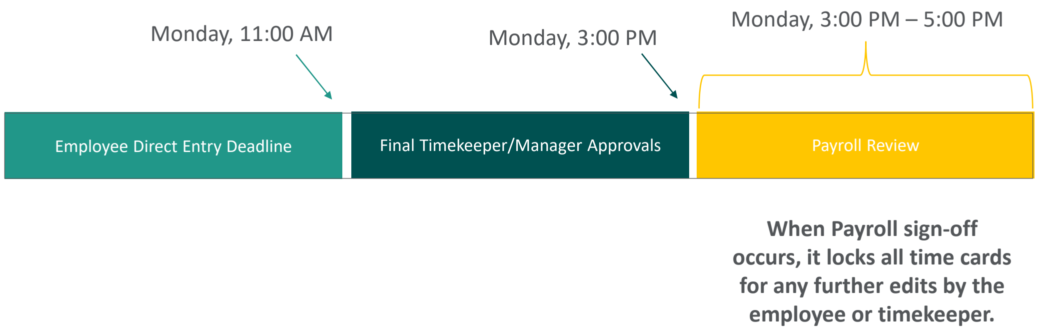
Manager approved timecards display with a light purple shading and prevent further edits or additions by the employee or yourself. If additional edits are required, select the Remove Approval icon.

Note: Manager/Timekeeper approvals can only be removed prior to the pay period close processing deadline. Once Payroll has begun processing and/or signed-off on the pay period, additional edits can only be made as a historical correction.

Direct Entry Approval Process for Bi-Weekly Pay Group



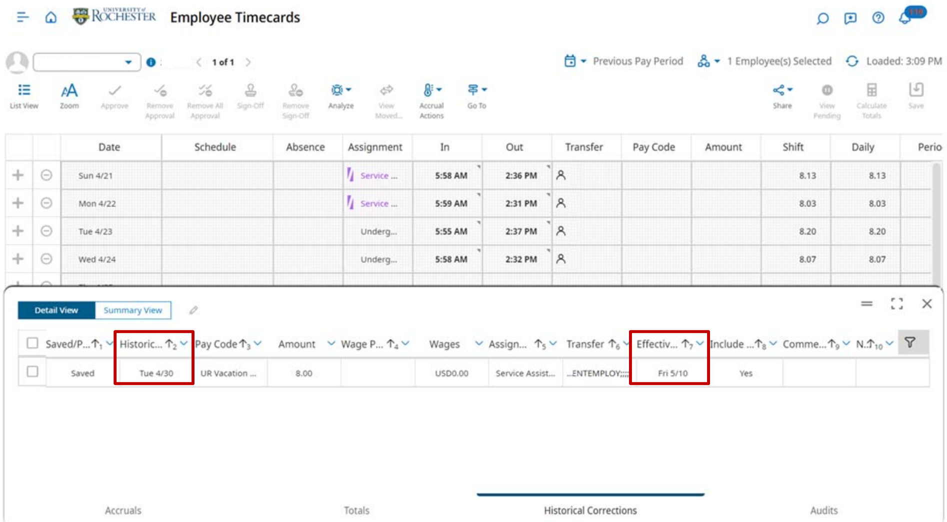
Time entry deadlines for the employees and Timekeepers are essential to Timekeeping. This timeline shows the approval process for direct entries into myURHR UKG for Bi-weekly pay group only.
Time approval deadlines have been created to allow Managers and Timekeepers enough time to review, edit and approve employee time as well as provide the Payroll team the ability to review time from UKG

- Hourly Employees enter time by 11:00 AM on Mondays for the pay period just ending.
- Timekeepers approve time and edits by 3 PM Mondays
- Payroll processing occurs from Monday 3PM to 5 PM. When payroll sign-off occurs, the time cards are locked for any further edits.

For example, BWH payroll, employees will enter time by 11:00 AM following the closed pay period.
The next Biweekly payroll is for the check date 8/2/2024 covering the pay period start date 7/14/24 and pay period end date 7/27. In this case, employees must enter time by 11:00 on 7/29/2024, and all timekeepers and Managers must approve time by 3:00 PM the same day 7/29/24 so Payroll can review and Sign off by 5:00 PM.

It's important to know that direct edits by the hourly employee not approved by Timekeeper or Manager before Payroll sign-off will be rejected. The employee will be notified of any rejected time in UKG. At that point, rejected time would need to be addressed as a historical correction in UKG with their Timekeeper or Manager.

Historical Corrections



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Timecards should be reviewed regularly to limit historical corrections.

When an employee's timecard has been submitted to payroll with an error, a historical correction can be applied once enabled by Payroll.

Historical corrections are applied in the employee's timecard in the same fashion other edits are applied. Review your correction in the Historical Corrections tab.

The updated entries will show the historical date they were applied to and the Effective Date. As a standard, historical corrections will be processed/paid in the pay period in which the effective date falls.

Off-cycle Check Request (myURHR Workday)

- An off-cycle check request can be initiated in myURHR Workday, for missed pay that cannot reasonably be expected to wait to receive until the next pay period.
- Submitted anytime by a Coordinator.
- Payroll processing occurs on Mondays and Wednesdays at 3 PM and ready two days later, when approved.
- Every Off-cycle check can be a direct deposit or paper check.

QRC Link

51 myURHR UKG

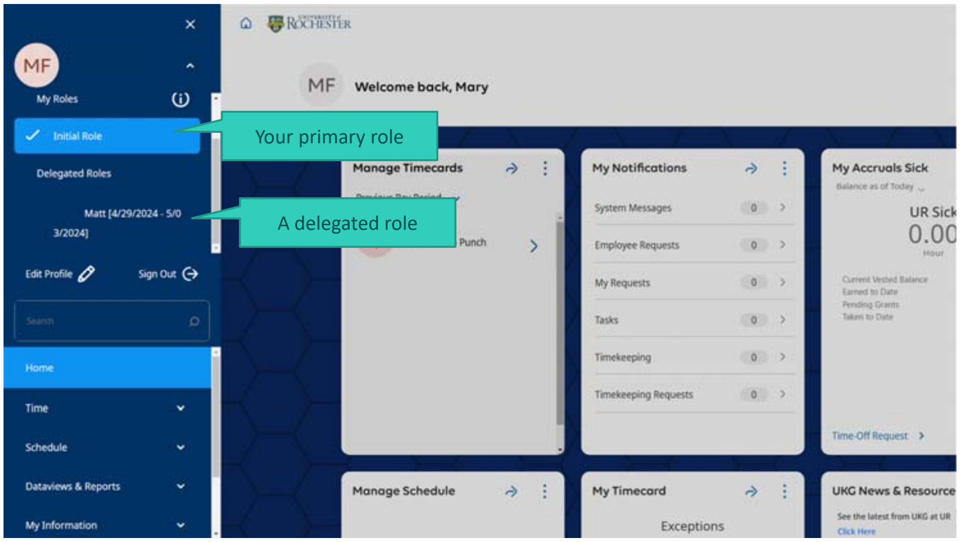
An off-cycle payroll request can be initiated for special circumstances in myURHR Workday, if an employee notices time is missing from their paystub and cannot wait for a historical correction to be made for the missed pay to be added in their next pay period.

Off-cycle requests can be submitted anytime in myURHR Workday by a coordinator and are processed on **Mondays** and **Wednesday** at 3 PM. Payment will be ready two days later, if approved by payroll. If this request is for an award, allow for 5 business days. Timekeepers and Managers should work with their Coordinator if a request is needed.

Every off-cycle check can be set for a direct deposit or paper check based on the employee's preference setting in myURHR Workday. The is a fee for each request.

As a reminder off-cycle checks are NOT intended to be used as a substitute for meeting payroll deadlines as established in the payroll calendars published on the Payroll website. Pleaser refer to the University's Policy on Off-Cycle Issuance of Payroll Payments.

Delegation



When you are unable to fulfil your UKG responsibilities you can request another Manager/Timekeeper perform those tasks when you are away from work.

A request is typically submitted when a Manager/Timekeeper will be out of the office and needs temporary coverage of their responsibilities.

During the delegation you can switch role from the Main Menu.

Demonstrations and Activities

Timecard Overview Video

Employee Recording Your Time Video

Respond to Missed Punch Requests

Add Punches and Comments

Cancel Meal Deduction

Assignments and Transfers

Approve Time Off Requests

Add a Pay Code

Add Intermittent Leave

Approve an Individual Employee Timecard

Approve a Group of Employee's Timecards

Historical Corrections

Submit Delegation Request

Accept Delegation Request

Switch to Delegate Role

53

myURHR UKG

Announcements

54

myURHR UKG

Announcement: Schedule Groups

During the transition to **UKG Timekeeping**, the advanced scheduling groups in **UKG** will be reset and people will be moved back (based on their primary HR job assignment) to their *default* scheduling groups, as follows:

- Last name A-M – Group A
- Last name N-Z – Group B
- Per diem/TAR workers – Group C

This means that schedulers/managers will need to take action to move people from the default groups back into the scheduling groups they want them in, a QRC is available on myURHR training page.

More information on timing, and any actions needed, will be communicated prior to the reset.

Announcement: Traveling Nurses

The process for entering Traveling Nurses into UKG will become automated.

Approximately a month after the transition to **myURHR**, any new Traveling Nurses will automatically be entered into **UKG.**

For any Travelers not in **UKG** before it becomes automated, please continue to add them using your current process.

More information on timing, and any actions needed, will be communicated prior to automation.


myURHR
UKG
Questions?
57

myURHR Webpage
One stop shop for all things myURHR related, including Key Changes, Fast Facts videos, the Training page and more!

MyPath and Tech.Rochester.edu
The place to find all training material offered for understanding how to use myURHR.

Ask-URHR
When you need help utilizing the system, reach out through email or phone to connect with experts.

Thank you for your participation today!

As a reminder, you have a number of resources at your disposal should you have questions once we get to Go-Live.

The myURHR webpage will direct you to all of your resources, so I recommend bookmarking it if you haven't already.

All QRCs can be found on the tech.rochester page as well and don’t forget Ask-URHR is there to help answer questions regarding business processes or help utilizing myURHR Workday or UKG. As always, for assistance logging in, contact your Help Desk.

After this session, I will mark you down as attended, and this course will moved to your Completed transcript.
Next, you will also be receiving a short survey. Please let us know how your session went today!

Thank you

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