Enable edits – correcting leave usage for exempt employees

If an exempt requested leave and ended up working that day (or days), the leave request should be cancelled by the employee. Otherwise, the employee is using leave unnecessarily.

If the employee, supervisor, or timekeeper identifies this issue after timekeeper signoff:
Because the timecard has already been signed off, there is a two-stage process that involves both the timekeeper and the supervisor:
1. Timekeeper does enable edits for that employee’s timecard.
2. Supervisor/timekeeper adjusts the leave request to cancel out the day(s) of leave.
   • The process varies slightly depending on whether the leave request was submitted by the employee or by the supervisor.

Reminder: to avoid the risk of payroll errors, historical corrections for the previous pay period should not be completed until the Monday following signoff for that pay period.

Stage 1: Timekeeper does enable edits for that employee’s timecard.
1. On the Manage My Department page, display a list of employees and select the employee name.
2. Click on the Approval command and select Enable Edits from the dropdown menu.

3. When the Enable Edits warning window appears, click on the Yes command.

4. It doesn’t look like anything has actually happened, but if you open the employee’s timecard, you will see that it is now possible to edit the timecard because the add (+) and delete (x) signs are available to the left of the Date column.
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Stage 2: Supervisor/timekeeper adjusts the leave request.
For exempt employees, there are 2 possible scenarios:
- The employee requested leave and it was approved, but the employee ended up working.
- The supervisor/timekeeper had put leave on the employee’s timecard, but the employee ended up working.

Scenario 1: The employee requested leave and it was approved, but the employee ended up working.
1. Open the employee’s timecard and navigate to the correct pay period using the Context Selector or the Select Dates command.
   Note: the employee’s timecard still has the grey background that indicates that it has been signed off, but you will be able to edit as necessary.
2. To double-check your work, consult the Accruals tab to see the employee’s leave amounts being adjusted:
   - Click on the Show or Hide More Content command to open the tabs at the bottom of the timecard.
   - Open the Accruals tab and select the day before the leave was taken. Note the amount of leave available on that day in the Accruals Available Balance column.
   - Select the day the leave was taken and note the amount, which should have decreased by the number of hours that represent a full day for the employee.
3. On the timecard, look in the Pay Code column to identify the type of leave used to fulfill the employee’s leave request. In the below example, it is Annual Leave (hint: employees
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request a leave type with the word “Cascade” attached, but the leave used to fulfill the request, generally on the second line, does not include the word “Cascade”).

4. Click on the plus (+) sign for that day to add a line to the timecard.
5. In the new blank line, click on the blank cell in the Pay Code column and select the appropriate leave type from the dropdown list.

6. On the day in question, enter a zero (0).

7. Click on the Calculate Totals command. The leave amount changes to zero (0) in both lines of the request. The black dot in the upper-right corner of the date field indicates that an historical correction has been made.

8. Repeat the process of reviewing the leave amounts being adjusted:
   • Click on the Show or Hide More Content command to open the tabs at the bottom of the timecard.
   • Open the Accruals tab and select the day before the leave was taken. Note the amount of leave available on that day in the Accruals Available Balance column.
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- Select the day the leave was taken and note the amount, which should have changed in accordance with the change you just made.

9. Open the Historical Corrections tab and review the information there. It should show the correct type of leave in the Pay Code column, and a negative number corresponding to the amount of leave that was cancelled out in the Amount column. A checkbox appears in the Pending column because you have not yet saved your change.

10. Before saving your work, you must add back in the “Hours Worked” information for that employee, so that total hours for the week are correct.
   - Click on the plus (+) sign to the left of the day to add another line.
   - Click into the Pay Code column and select Hours Worked from the dropdown list.
   - Enter the number nine (9). (Remember, exempt employees have an automatic one-hour lunch deduction.)

11. Hit the Tab or Enter key to move out of the cell, and then click on the Calculate Totals command.

12. Double-check that the Total Hours data is now correct for the week by reviewing the All Hours line on the Totals tab at the bottom of the timecard.

13. Click on the Save command to finalize the edit.

Scenario 2: The supervisor/timekeeper put leave on the employee’s timecard, but the employee ended up working.

1. Open the employee’s timecard and navigate to the correct pay period using the Context Selector or the Select Dates command.
   Note: the employee’s timecard still has the grey background that indicates that it has been signed off on, but you will be able to edit as necessary.
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2. To double-check your work, you can consult the Accruals tab to see the employee’s leave amounts being adjusted:
   - Click on the Show or Hide More Content command to open the tabs at the bottom of the timecard.
   - Open the Accruals tab and select the day before the leave was taken. Note the amount of leave available on that day in the Accruals Available Balance column.
   - Select the day the leave was taken and note the amount, which should have decreased by the number of hours that represent a full day for the employee.

3. Because the supervisor/timekeeper had put the leave on the timecard, the request itself can be edited. Click into the Amount cell for the top line of leave request information so that the requested amount is highlighted, as shown in the screenshot below (hint: employees request a leave type with the word “Cascade” attached, and that is the line you will edit).

4. On the day in question, enter a zero (0) to show that no leave was taken.

5. Hit the Tab or Enter key to move out of the cell, and then click on the Calculate Totals command.

6. The two original lines of data about the leave request disappear and are replaced with a single line indicating that zero time was taken for that request. The black dot in the upper-right corner of the date field indicates that an historical correction has been made.

7. Repeat the process of reviewing the leave amounts being adjusted:
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- Click on the Show or Hide More Content command to open the tabs at the bottom of the timecard.
- Open the Accruals tab and select the day before the leave was taken. Note the amount of leave available on that day in the Accruals Available Balance column.
- Select the day the leave was taken and note the amount, which should not have changed.

8. Open the Historical Corrections tab and review the information there. It should show the correct type of leave in the Pay Code column, and a negative number corresponding to the amount of leave that was cancelled out in the Amount column. A checkbox appears in the Pending column because you have not yet saved your change.

9. You may need to add back in the “Hours Worked” information for that employee, so that total hours for the week are correct.
   - Click on the plus (+) sign to the left of the day to add another line.
   - Click into the Pay Code column and select Hours Worked from the dropdown list.
   - Enter the number nine (9). (Remember, exempt employees have an automatic one-hour lunch deduction.)

10. Hit the Tab or Enter key to move out of the cell, and then click on the Calculate Totals command.

11. Double-check that the Total Hours data is now correct for the week by reviewing the Total column on the timecard and the Totals tab at the bottom of the timecard.

12. Click on the Save command to finalize the edit.
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Understanding what historical corrections look like on the current week’s timecard

Any changes made through the Enable Edits process will be reflected on the current week’s timecard in the Totals and Audit tabs.

Information on the Audit tab

On the Audits tab, there will be a line with the date of the historical correction summarizing the action(s) taken.

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Type</th>
<th>Account</th>
<th>Pay Code</th>
<th>Amount</th>
<th>Work Rule</th>
<th>Override</th>
<th>Comment</th>
<th>Edit Date</th>
<th>Edit Time</th>
<th>User</th>
<th>Data Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/16/20</td>
<td></td>
<td>Add Cor...</td>
<td>/20190/3BP</td>
<td>Sick Le...</td>
<td>-7.15</td>
<td></td>
<td></td>
<td></td>
<td>1/16/20</td>
<td>16:41:30</td>
<td>su_el...</td>
<td>Timecard</td>
</tr>
</tbody>
</table>

Information on the Totals tab

On the Totals tab, a new eyeball icon appears on the right-hand side that allows you to filter to see the historical corrections. The default is set to show all totals for the week.

If you click on the dropdown arrow beside the eyeball icon, you can filter in these ways:

- All Totals - current pay period and any corrections made to the timecard
- Corrections – only data about the historical correction(s)
- No Corrections – only data about the current pay period

In the scenario documented above, selecting “All Totals” shows the current week’s data and the sick leave correction:

<table>
<thead>
<tr>
<th>Location</th>
<th>Job</th>
<th>Account</th>
<th>Pay Code</th>
<th>Amount</th>
<th>Wages</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>/20190/3BP</td>
<td>All Hours</td>
<td>29:00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>/20190/3BP</td>
<td>Basic Pay</td>
<td>36:15</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>/20190/3BP</td>
<td>Sick Leave Employee</td>
<td>-7.15</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

Selecting “Corrections” shows the sick leave that was removed:

<table>
<thead>
<tr>
<th>Location</th>
<th>Job</th>
<th>Account</th>
<th>Pay Code</th>
<th>Amount</th>
<th>Wages</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>/20190/3BP</td>
<td>All Hours</td>
<td>-7.15</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>/20190/3BP</td>
<td>Sick Leave Employee</td>
<td>-7.15</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
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Selecting “No Corrections” shows data from the current pay period:

<table>
<thead>
<tr>
<th>Account</th>
<th>Pay Code</th>
<th>Amount</th>
<th>Vages</th>
</tr>
</thead>
<tbody>
<tr>
<td>.0000-0000/000453/999999-999999/MA/20190106</td>
<td>All Hours</td>
<td>36.15</td>
<td>0.00</td>
</tr>
<tr>
<td>.0000-0000/000453/999999-999999/MA/20190106</td>
<td>Base Pay</td>
<td>36.15</td>
<td>0.00</td>
</tr>
</tbody>
</table>