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| Managing time and leave Approval |
| **Course Title**  | **Managing Time and Leave Approval** |
| **Course Description** | This course is designed to teach Supervisors the skills and tools required to evaluate and approve timesheet entries in compliance with applicable time and leave rules and to troubleshoot timesheet errors to ensure employees are paid correctly. |
| **Target Audience** (Total #) | All Supervisors who approve time (approx. 500) |
| **Process** | Time and Leave Approval |
| **Process Touch Points** | Payroll |
| **Lessons** | Course OverviewIntroduction to Time ManagementWorking Time Leave Entry Additional Time Related ErrorsApproving Time  |
| **Total Time** | 2.25 hours |
| **Delivery Method(s)** | eLearning (Articulate) |
| **Prerequisites** | * Employee Time Entry
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| **SME(s)** | Rachel GraftonBeverly Wyatt |
| **Training Developer(s)** | Jason Prince |
| **Instructor(s)** | TBD |
| **Frequency** | Once and On Demand as required |
| **Course Content Reviewer(s) and Approver** | Beverly WyattRachel Grafton |
| **Location** | eLearning |
| **List of Training Materials Required to Support Course Delivery** | Power PointWork InstructionsExercises |
| **List of Supporting Materials** | Timesheet Review ChecklistTimeline of Time Approver EventsRequired Timesheet field by role |

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| **Course Purpose**  |
| This course is designed to teach Supervisors the skills required evaluate and approve timesheet entries to ensure their employees are paid correctly. |
| **Course Objectives**  |
| Upon completing this course, participants should be able to:* Understand the Supervisor’s role within the time entry and approval process, why it is important, and any budgetary impacts
* Understand work schedules and their relevance to time approval
* Evaluate timesheet entries (attendance, leave, and special pay) to ensure compliance with CDOT time policies and FLSA regulations when approving time
* Describe the types of reports available to assist with time approval
* Approve and reject time in SAP within applicable deadlines
* Resolve common employee time and leave entry errors and issues
* Access resources to manage special leave situations and exceptions
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| **Content Outline** |  |
| Lesson 1: Course Overview | **Time:** 15 minutes |
| Lesson Objectives | * Provide overview of the time and leave approval process (L2)
* Understand the roles and responsibilities of the supervisor in the approval process (L2)
* Understand why you as a supervisor need to accurately approve time
* Identify the consequences of incorrect time entry and unapproved times for the employee and CDOT
* Identify the importance of time approval and budget consequences
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| Business Process | Time Approval |
| Terms and Concepts | * Special Pay – Any additional payment to an employee for work performed outside of their regular working time such as overtime, shift and on-call pay.
* Payroll timeline – The deadlines by which an employee must submit working time and the manager must approve the working time for the employee to be paid.
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| Lesson 2: Introduction to Time and Leave  | **Time:** 30 minutes |
| Lesson Objectives | * Recognized different employee groups and subgroups (Monthly, Bi-weekly, Exempt, Non-Exempt, Temporary)
* Understand the impact of different employee groups on time evaluation and approval
* Identify additional factors that impact time (Exempt Employees and Non-Exempt employees, Flex Schedule) and which employees are impacted
* Describe the Work Schedule (why it is important)
* Describe help resources and what kind of help they can offer (Payroll, Timekeeper, HR Employees)
* Introduce CAPP and how run transaction to view entries for approval (L2)
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| Business Process |  |
| Terms and Concepts | * Work Schedule – The work hours and time assigned to the employee.
* Exempt Employees - Any employee whose position has been determined in accordance with the Fair Labor Standards Act (FLSA) to be exempt from overtime compensation. The exempt category includes executive, administrative professional and professional positions. Employees in these positions are not eligible to accumulate, use or receive compensation for hours worked in excess of forty per week.
* Non-exempt Employee - Any employee whose position has been determined, in accordance with the FLSA, as eligible to receive overtime compensation or compensatory time off for all hours worked in excess of forty per established work week.
* Temporary - Temporary employees hold a non-permanent position at CDOT. They are eligible to work 9 months within a 12 month period and are eligible (non-exempt) for overtime.
* Permanent Part Time – Employees who work year round, but are funded to work less than 40 hours a week.
* Permanent Full Time – Employees funded to work 40 hours a week.
* Winter Permanent Part-time - Employees funded to work full time during part of the year. Typically, they work November-April to help out during the winter season. They are eligible for overtime (non-exempt).
* Comp Time – Time off offered to non-exempt Employees in lieu of additional pay.
* Exempt Time Off – Time off awarded to an exempt employee by an Appointing authority for a significant amount of additional hours in a work week.
* Shift Differential – A type of premium pay based on the work schedule of the employee which allows
* Essential Position - Non-exempt positions required to perform critical work or emergency services without delay or disruption. These positions are critical to the preservation of the health, safety or welfare of CDOT employees and the traveling public
* On Call – Pay premium driven by the employee’s immediate availability for work.
* Scheduled Time – Hours worked within the employees scheduled time.
* Unscheduled Time – Hours worked outside of the employee’s assigned work schedule.
* Monthly – Employees who are compensated monthly.
* Bi-weekly – Employees who are compensated every two weeks.
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| Transaction (Name and T-code) | T-Code | uP Recording | Worksheet | Exercise |
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| Lesson 3: Approving Working Time | **Time:** 30 minutes |
| Lesson Objectives | * Understand rules and policy associated with working time entry (Regular time, overtime, comp time, alternate holiday)
* Identify if working time entries have been entered on the timesheet correctly
* Evaluate timesheet to determine if an employee has worked their full working time based on work schedule and work week
* Evaluate timesheet to identify when an employee is eligible for overtime, comp time and alternate holiday
* Understand when wage types should be used and evaluate if they have been used correctly on the timesheet
* Identify what to look for during the approval of time coded over midnight
* Understand budget impact as a result of approving working time (shift differential during unscheduled hours, overtime)
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| Business Process | Time Entry to Pay Process – The process where employees enter their time and leave, managers approve the time and leave and the employee is paid. Comp Time Agreement – A form used by non-represented employees outlining how compensatory time is used and paid. |
| Terms and Concepts | * Fair Labor Standards Act - The Fair Labor Standards Act identifies basic rules covering employee compensation. These include regulations about minimum wage, child labor, recordkeeping and overtime pay.
* Work Centers – A person or a group of people and equipment which perform maintenance work.
* Work Order Number – Used to plan, schedule, review and authorize work prior to it being performed.
* Personnel Number - Unique number used to identify an employee.
* A/A Type - Describes the reason for the attendance or absence. Absence types describe an employee’s leave in more detail whereas attendance types document employees' work type, such as regular vs overtime.
* Wage Type - Code used to capture on call or shift premium pay.
* Date Hours - Hours worked on the calendar day.
* Start and Stop Time - Start and stop time for the work. Significant when calculating shift differential.
* Receiver Cost Center - Cost center to which time entry costs are charged.
* Receiver Functional Area - Functional Area to which time entry costs are charged.
* Receiver Order - Work order used to receive the cost of the time. Links the time entry and the MLOS budget.
* WBS - Work Breakdown Structure. Identifies project and phase to which time entry costs are charged.
* Regular Working Time – The time an employee is required to account for using a combination of work time and leave.
* Additional Regular Time – Hour that exceed the 40 compensated hours for a workweek, but are less than 40 hours physically worked due to comp time or paid leave.
* Attendance quota (Maintenance only)
* Overtime – Hours worked in excess of 40 hours physically worked by the employee resulting in overtime pay.
* Alternate Holiday - Up to 8 hours of leave given to an employee who works a state holiday or is scheduled off for the holiday
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| Transaction (Name and T-code) | T-Code | uP Recording | Demo | Exercise |
| Review and approve time entries and leave requests (Multiple Employees) | CAPP | X (quicksheet) |  |  |
| Query and report on time and leave entries | CADO | X (quicksheet) |  |  |
| Required Timesheet Fields by Role |  |  | X |  |
| Required A/A Types by Role Sheet |  |  | X |  |
| Checklist for Time Approval | N/A |  |  |  |
| How to sign-up for the Manager Time group calendar (We can create this and have people sign up) | N/A |  |  |  |
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| Lesson 4: Approving Leave | **Time:** 20 minutes |
| Lesson Objectives | * Understand the leave process including leave accruals and how leave approval impacts leave quota banks
* Describe the most common A/A Types for Leave and what to review when approving (verify number of hours, A/A Type is accurate, hours match work schedule, eligibility for leave)
* Identify the types of leave the manager can approve (Annual, Sick, Paid Military, Paid FML Types, Alternate Holiday and Parental Academic Leave)
* Identify the types of leave that require additional process steps before approval (LWOP, Admin, FML, Military Leave, Leave Grant, and Victim Protection) and the resources available if this leave is entered on the EE Timesheet
* What you should communicate to employees about leave type (who to call for sick, when to request annual leave, holiday expectations, overages, comp time usage (within one year)
* Describe resources available to managers by leave type HR Specialist, Employee Relations, Risk Management Timekeeper
* Understand the restrictions of leave for Part-time (all leave types, but prorated) and Temporary Jury and administrative with restrictions)
* Utilize the Leave Summary Report and Annual Use or Lose Report to manage employee leave usage and to help you proactive plan employee absences
* Understand budget impact as a result of approving leave (charged to home cost center)
* Essential position, Essential work,
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| Business Process |  |
| Terms and Concepts | * Sick Leave - Sick leave is paid leave for health reasons for the employee or qualifying dependent.
* Annual Leave – leave used for an employee’s personal needs, such as vacation.
* Alternate Holiday - up to 8 hours of leave given to an employee who works a state holiday or is scheduled off for the holiday
* Leave without Pay - unpaid leave that is granted after all leave has been used.
* Quotas – Paid time away from work for an approved absence.
* Accruals – The total amount of accrued leave that an employee has in his or her SAP leave bank for annual and sick leave.
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| Transaction (Name and T-code) | T-Code | uP Recording | Demo | Exercise |
| Display Leave Summary Report | SAP Portal MSS | X (quicksheet) |  |  |
| Display Annual Use or Lose Report | SAP Portal MSS | X (quicksheet) |  |  |
| Checklist for Leave Approval |  |  |  |  |
| One page summary sheet to describe each Absence type |  |  |  |  |
| Lesson 5: Additional Time Related Errors | **Time:** 15minutes |
| Lesson Objectives | * Describe the timeline for changes to errors on the timesheet (when emails (unapproved time and correction are sent and time due)
* Identify what collisions to the timesheet mean and how to troubleshoot (WBS Element, Work Order Payroll Locked)
* Describe when an employee Work Schedule need to changed and the benefits
* Identify alternate time approvers
 |
| Business Process | Timesheet Entry and ApprovalChange Working Time |
| Terms and Concepts | * Time collision
* Work Schedule change
* Payroll
 |
| Transaction (Name and T-code) | T-Code | uP Recording | Demo | Exercise |
| Unapproved time report | CADO | X (quicksheet) |  | X |
| Under 40 hours worked | ZCAT3 | X (quicksheet) |  | X |
| Overtime Error report |  |  |  |  |
| Time Collision email |  |  | X |  |

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| Lesson 6 – Summary | **Time:** 5 minutes |
| Concepts | * Course Objectives Review
* Additional Support
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**Structure for the each of the help topics:**

1. Who is it relevant to?
2. Rule that applies to the topic
3. Why is it important/relevant
4. What to look for (what does it look like on the timesheet
5. What are the actions you need to take to approve the time
6. What are the help resources