



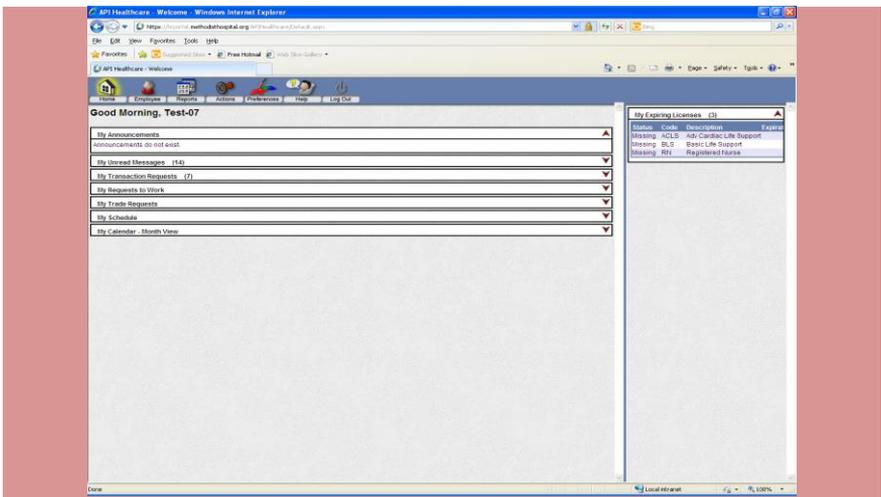
# METHODIST HOSPITAL

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*of Southern California*



## EMPLOYEE SELF SERVICE TRAINING GUIDE



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## Terminology

### **Calendars**

Scheduled activity where the employee is NOT clocked in and working. Some examples of Calendar entries are: Paid Time Off, Unscheduled Paid Time Off, and Unpaid Time Off. This is also known as non-productive time. This time is paid to the employees.

### **Clockings**

Time punch entered into the system (similar to "punching a clock") when an employee starts and ends their shift. This is also known as productive time.

### **Special Codes**

Special Codes may only be attached to productive clockings to indicate special processing circumstances. When Special Codes are used, they indicate that something other than the normal Pay Code calculation should occur. Examples of special codes are Orientation and Education.

# IMPORTANT:

**All Transactions are requests. Managers will need to approve your request(s) in order to reflect on your timecard. To verify the status of your request, review your home screen.**

Home Employee Reports Actions Preferences Help Log Out

**Good Morning, Test-07**

**My Announcements**  
Announcements do not exist.

**My Unread Messages**

**My Unavailability Requests**

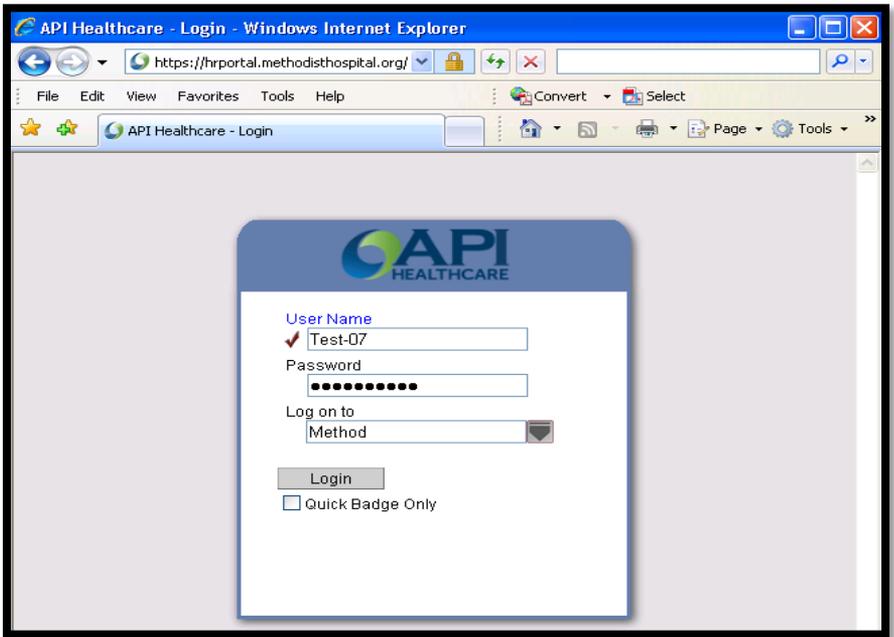
**My Transaction Requests (1)**

Type	Status	End Date	End Time	Reason
		03/11/2013	16:30	Forgot to Clock Out.

Hide Selected

This Status field will indicate if your request(s) has been approved by your manager.

# Self-Service Log In



## Login Tips

- Enter your Network User Name and Password (Passwords are case sensitive)
- The Network User Name and Password is the same as if you are signing onto a computer or Outlook to check your emails. **Please contact Help Desk at ext 4357 if you are having issues with your Network Login.**

# Home Section

Once you are logged in, the Home section appears. Currently in the main section, the My Announcements, My Unread Messages, and My Schedule cards are displayed.

The yellow halo around the icon on the section bar indicates which section you are currently in.

Status	Code	Description
Missing	ACLS	Adv Cardiac Life Support
Missing	BLS	Basic Life Support
Missing	RN	Registered Nurse

# Employee Section

The screenshot shows the 'Employee' section of the API Healthcare Time Card Screen. The 'Employee' tab is highlighted in the top navigation bar. The main content area displays a 'Transactions (List)' table with the following data:

Transactions	Date	Time	Hours	Code	Unit
<input type="checkbox"/> IN	Mon 03/11/2013	07:00	0.00	~~~~~	6030.01
<input type="checkbox"/> OUT	Mon 03/11/2013	12:00	0.00	~~~~~	6030.01
<input type="checkbox"/> IN	Mon 03/11/2013	12:30	0.00	~~~~~	6030.01

Below the Transactions table is an 'Exceptions' table with the following data:

Posted	Description	Type	Created
<input type="checkbox"/>	03/11/2013 No Lunch Attestation answer was provided for the entire continuous shift	Calculation	03/15/2013 16:23
<input type="checkbox"/>	03/11/2013 An Odd Clocking was detected	Calculation	03/15/2013 16:23

To the right of the Exceptions table is a 'Pay Distributions (Daily Hours)' section showing a table for Unit 6030.01 and Job Class 120010, with a 'Total Worked' of 5.00.

**Most of your responsibilities and tasks will occur within the Employee section. When the Employee section opens, the Time Card Screen (TCS) appears by default. This is where modifications, time off, benefit balances, and pay information are located.**

# Common Employee Actions

There are a number of functions that you may frequently use in the solution. Adding requests and viewing your pay distributions and benefit balances are a few key components of the system.

## ➤ Add a Clocking – Request to input your Missed Punch(es)

1) In the left pane, **select Add Clocking.**

The screenshot shows the HR system interface for Employee E000001. The left pane contains several sections: 'Employee Navigator' (Employee: E000001, Name: Test-07 Test, Pay Period: 03/10/2013 - 03/23/2013), 'Transaction List Items', 'Transaction List Actions', 'Employee Favorites' (Add Calendar, **Add Clocking**, TCS, Labor Distributions), 'Employee Actions' (Add Unavailability, Employee Sign Off, Open Current Schedule, Open Self Schedule), and 'Employee Sections' (General, Licenses, Locations, Monthly View, Phones, Quick Codes, Time Card Report, Web Addresses). The main window displays a 'Transactions (List)' table with the following data:

Transactions	Date	Time	Hours	Code	Unit	Job Class
<input type="checkbox"/> IN	Mon 03/11/2013	07:00	0.00	~~~~~	6030.01	120010
<input type="checkbox"/> OUT	Mon 03/11/2013	12:00	0.00	~~~~~	6030.01	120010
<input type="checkbox"/> IN	Mon 03/11/2013	12:30	0.00	~~~~~	6030.01	120010

Below the transactions, there are sections for 'Exceptions' and 'Pay Distributions (Daily Hours)'. The 'Exceptions' section shows a list of exceptions, including one for '03/11/2013 An Odd Clocking was detected'. The 'Pay Distributions (Daily Hours)' section shows a table for 'Unit 6030.01 - Job Class 120010' with a total of 5.00 hours worked.

- 2) **Enter the Date and Time of the Missed Punch, which are required fields.** Enter a reason for your request and Click on Save or Enter.

The screenshot shows the 'Employee Navigator' interface. On the left, there is a sidebar with 'Employee Navigator' (Employee: E000001, Name: Test-07 Test, Pay Period: 03/10/2013 - 03/23/2013), 'Employee Favorites' (Add Calendar, Add Clocking, TCS, Labor Distributions), 'Employee Actions' (Add Unavailability, Employee Sign Off, Open Current Schedule, Open Self Schedule), and 'Employee Sections' (General, Licenses, Locations, Monthly View, Phones, Quick Codes, Time Card Report, Web Addresses). The main form area has a top navigation bar (Home, Employee, Reports, Actions, Preferences, Help, Log Out). The form fields include: Date\* (03/11/2013), Time\* (16:30), Transaction Order, Special Code 1\* through 5\*, Requested Reason (Forgot to Clock Out.), and a Save button. A yellow callout box points to the Date and Time fields with the text 'Enter the Date and Time of the Missed Punch you are requesting.' Another yellow callout box points to the Requested Reason field with the text 'Type a reason for your request.' A third yellow callout box points to the Save button with the text 'Click Save or Press Enter'.

- 3) After you save your request, your timecard should look like the timecard below. Remember, the transaction is a request, not posted to your timecard until your manager approves it.

Transactions (List)							
Transactions	Dist	Date	Time	Hours	Code	Unit	Job Class
IN		Mon 03/11/2013	07:00	0.00	-----	6030.01	120010
OUT		Mon 03/11/2013	12:00	0.00	-----	6030.01	120010
IN		Mon 03/11/2013	12:30	0.00	-----	6030.01	120010
IN		Mon 03/11/2013	16:30				

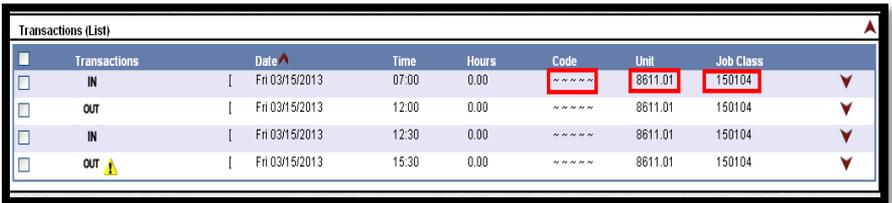
Requested Reason: Forgot to Clock Out

Your transaction is now on your timecard as a request. Your manager will need to approve it before it is posted on your timecard.

## ➤ Edit a Clocking – Request to EDIT your Existing Punch(es)

### Charging to Education, Orientation, Job Class, and/or Cost Center

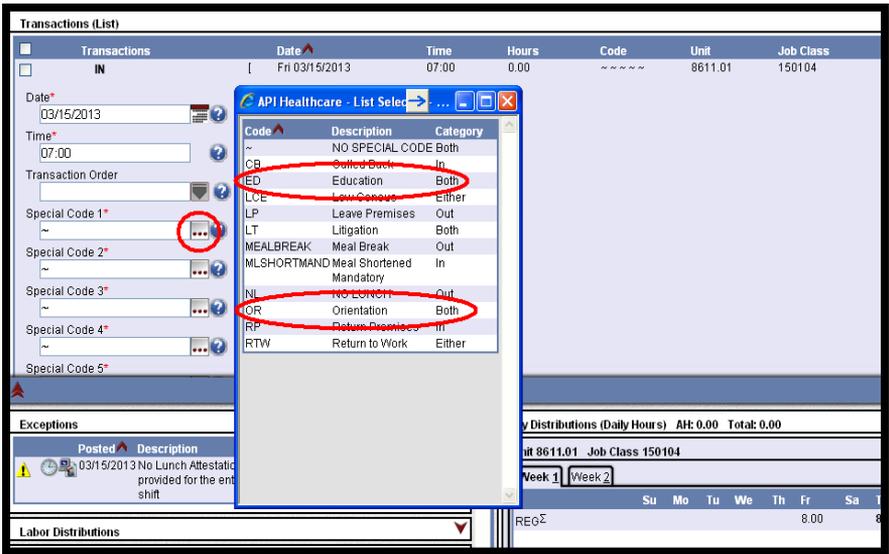
- 1) Review your timecard and determine if you need to charge the time to education, orientation, alternate job class and/or cost center.



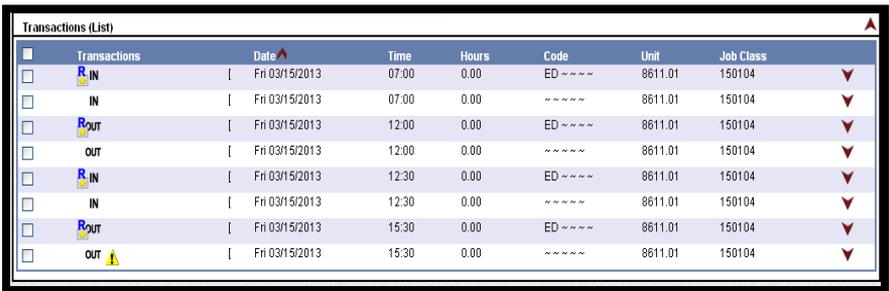
☐	Transactions	Date ▲	Time	Hours	Code	Unit	Job Class	▼
<input type="checkbox"/>	IN	[ Fri 03/15/2013	07:00	0.00	~~~~~	8811.01	150104	▼
<input type="checkbox"/>	OUT	[ Fri 03/15/2013	12:00	0.00	~~~~~	8811.01	150104	▼
<input type="checkbox"/>	IN	[ Fri 03/15/2013	12:30	0.00	~~~~~	8811.01	150104	▼
<input type="checkbox"/>	OUT ⚠	[ Fri 03/15/2013	15:30	0.00	~~~~~	8811.01	150104	▼

- 2) Click on the field that you want to make edits to. To charge to Education or Orientation, click on the  box.

- 3) A detailed transaction window will appear for that particular date and time. Under the Special Code field as shown below, click on icon.



**4) Select the appropriate transaction. Click on Save or Press Enter. Repeat the same steps for all existing transactions. After all request are entered, your timecard should look like the timecard below:**



**\*This will send your manager an alert to approve your request.**

**5) If you need to charge your hours to another cost center or an alternate position, follow Step 1, but click on the Unit and/or Job Class field.**

Transactions (List)							
Transactions	Date	Time	Hours	Code	Unit	Job Class	
IN	Fri 03/15/2013	07:00	0.00	~~~~~	8611.01	150104	▼
OUT	Fri 03/15/2013	12:00	0.00	~~~~~	8611.01	150104	▼
IN	Fri 03/15/2013	12:30	0.00	~~~~~	8611.01	150104	▼
OUT	Fri 03/15/2013	15:30	0.00	~~~~~	8611.01	150104	▼

**6) A detailed transaction window will appear for that particular date and time. Delete the existing Cost Center, Unit, and Job Class. Under the Cost Center, unit, and/or Job Class field as shown below, click on icon to get a list of Cost Center, unit and/or Job Class.**

The screenshot shows a software interface with a 'Transactions (List)' window. The selected transaction is for 'IN' on 'Fri 03/15/2013' at '07:00' with '0.00' hours, 'Code' 'ED ~~~~', 'Unit' '8611.01', and 'Job Class' '150104'. The 'General' tab is active, showing fields for Date, Time, Transaction Order, Special Code 1\*, and Special Code 2\*. Below these fields are dropdown menus for 'Cost Center' (set to 8611), 'Unit' (set to 8611.01), and 'Job Class' (set to 150104). Each dropdown menu has a small icon to its right. A 'Requested Differences' window is also visible. In the foreground, two 'API Healthcare - List Select' windows are open, showing a list of 'Payroll MHRG' items with columns for Code and Description. The list includes items like 'Transition Training', 'Transition Nursing', 'Transition Budget Ancillary', etc.

- 
- 7) Select the appropriate cost center and/or job class. Click on Save or Press Enter.**
  - 8) Repeat the same steps for all existing transactions.**

## ➤ Correct Your Daily Attestation

- 1) If you agree or disagree to the Daily Attestation by error, you need to correct your daily attestation as it applies to your transaction.
- 2) Identify the date and final out punch that you agree or disagree to the Daily Attestation. The Exception section will specifically help you identify what date is missing the Daily Attestation.

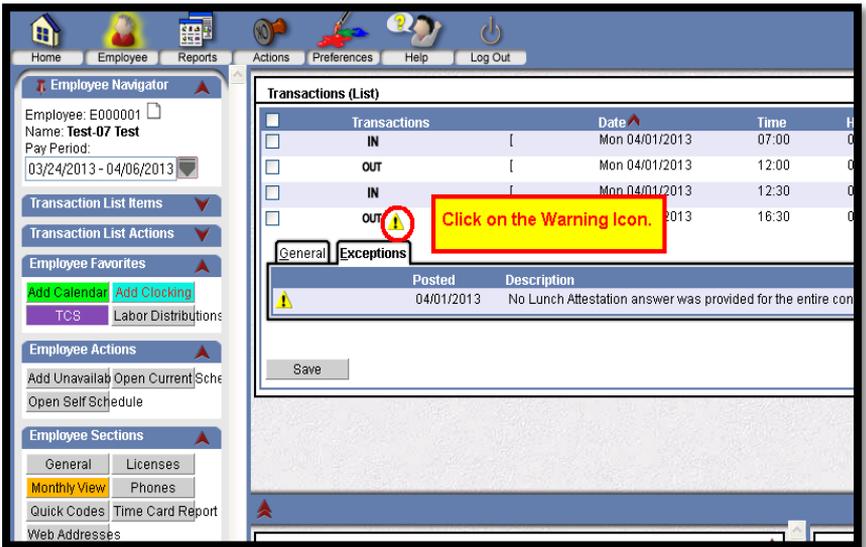
The screenshot displays a software interface for managing employee time. On the left is an 'Employee Navigator' sidebar with fields for Employee ID (E000001), Name (Test-07 Test), and Pay Period (03/24/2013 - 04/06/2013). Below this are sections for 'Transaction List Items', 'Employee Favorites', 'Employee Actions', and 'Employee Sections'. The main area shows a 'Transactions (List)' table with columns for Transactions, Date, Time, and Hours. A red circle highlights an 'OUT' transaction on 04/01/2013 at 16:30 with a warning icon. A large red arrow points from this transaction to an 'Exceptions' table at the bottom, which contains one entry: '04/01/2013 No Lunch Attestation answer was provided for the entire continuous shift'.

Transactions	Date	Time	Hours
IN	Mon 04/01/2013	07:00	0.00
OUT	Mon 04/01/2013	12:00	0.00
IN	Mon 04/01/2013	12:30	0.00
OUT	Mon 04/01/2013	16:30	0.00

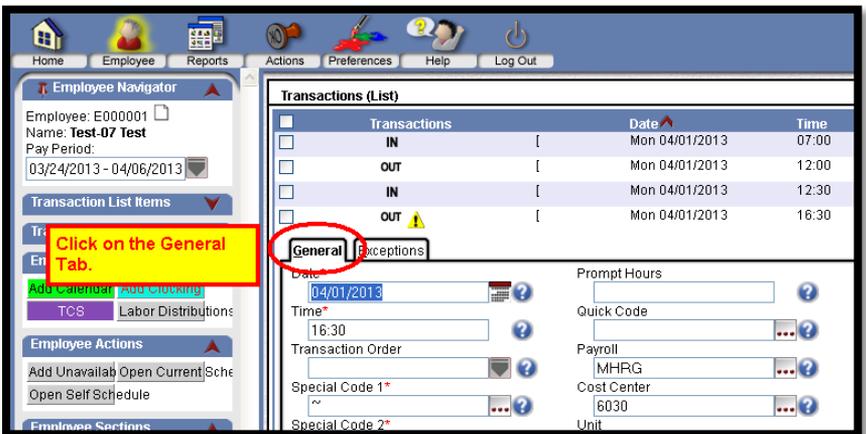
  

Posted	Description	Type	Created
⚠	04/01/2013 No Lunch Attestation answer was provided for the entire continuous shift	Calculation	04/05/2013 05:23

### 3) Click on the Yellow Warning Icon.



### 4) Click on the General tab to view the details of that particular transaction.



## 5) Select an answer to the Daily Attestation that applies to your transaction.

The screenshot shows the 'Exceptions' form with the following fields and values:

- Date\*: 04/01/2013
- Time\*: 16:30
- Prompt Hours: [Empty]
- Quick Code: [Empty]
- Transaction Order: [Empty]
- Special Code 1\*: [Empty]
- Special Code 2\*: [Empty]
- Special Code 3\*: [Empty]
- Special Code 4\*: [Empty]
- Special Code 5\*: [Empty]
- Requested Reason: [Empty]
- Payroll: MHRG
- Cost Center: 6030
- Unit: 6030 01
- Job Class: 120010
- Device Number: [Empty]
- User Shift Answer: **Yes** (highlighted)

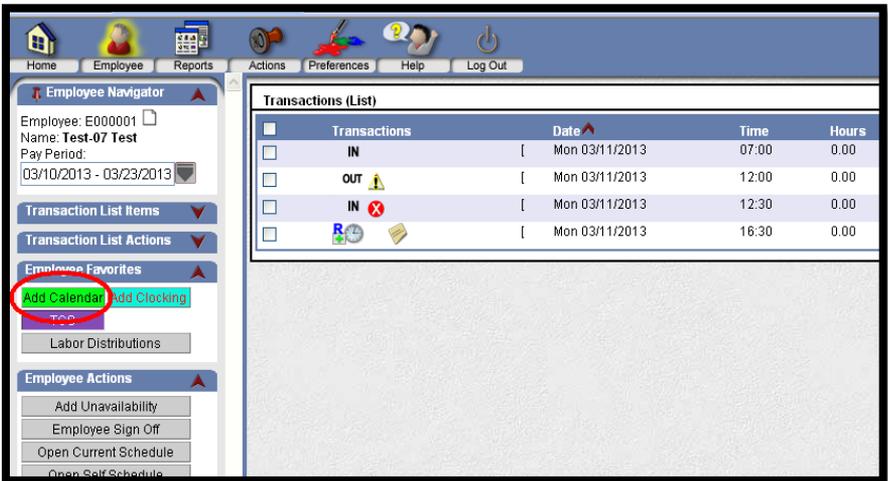
## 6) After you save your request, your timecard should look like the timecard below. Remember, the transaction is a request, not posted to your timecard until your manager approves it.

The screenshot shows the 'Transactions (List)' view with the following data:

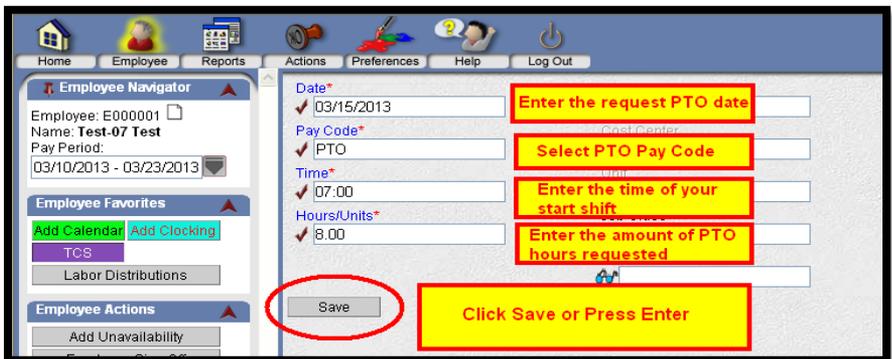
Transactions	Date	Time	Hours	Code
IN	Mon 04/01/2013	07:00	0.00	~~~~~
OUT	Mon 04/01/2013	12:00	0.00	~~~~~
IN	Mon 04/01/2013	12:30	0.00	~~~~~
<b>Rout</b>	Mon 04/01/2013	16:30	0.00	~~~~~
OUT	Mon 04/01/2013	16:30	0.00	~~~~~

## ➤ Add Calendar - Request to input your PTO Hours

1) In the left pane, **select Add Calendar.**



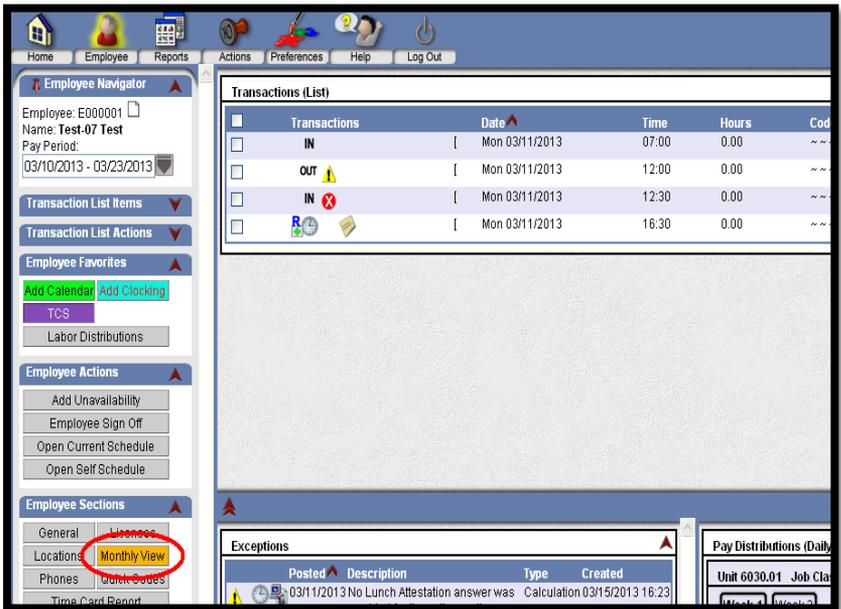
2) Enter the **Date**, **PTO Pay Code**, **Time** of your start shift or time you want to start your **PTO (Partial Day)**, and **Hours** of PTO request, which are required fields. Click on **Save** or **Enter**.



When information is entered and ready to be submitted, select **Save**.

## ➤ Add Calendar - Request to input PTO more than one day

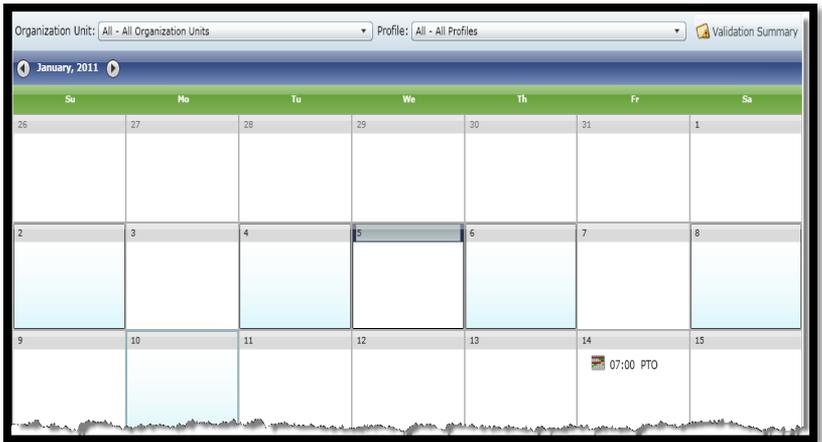
1) Under the Employee Sections, select **Monthly View**.



2) Press CTRL and select the days you want to enter calendars for.

**For example: In the following figure, 2<sup>nd</sup>, 4<sup>th</sup>, 8<sup>th</sup>, and 10<sup>th</sup> have been selected. This is indicated by the colors of the calendar, which are lighter.**

**Notice the month displayed in the screen shot is January; you will need to change this to the current pay period to see direct results on the Time Card Screen. Today's date is highlighted in dark gray (January 5).**



- 3) In the left pane under Employee Actions, select Add Calendar.**
- 4) Enter the appropriate Pay Codes and required fields.**
- 5) Select Save.**

# ➤ Overview of Timecard

The screenshot displays a web-based timecard management application. The interface is divided into several sections:

- Employee Navigator:** Shows employee details for 'Employee: E000001', 'Name: Test-07 Test', and 'Pay Period: 03/10/2013 - 03/23/2013'. It includes buttons for 'Add Calendar', 'Add Clocking', 'TCS', and 'Labor Distributions'.
- Transaction List:** A table listing timecard transactions.
 

Transactions	Date	Time	Hours	Code	Unit	Job Class
IN	Mon 03/11/2013	07:00	0.00	~~~~~	6030.01	120010
OUT	Mon 03/11/2013	12:00	0.00	~~~~~	6030.01	120010
IN	Mon 03/11/2013	12:30	0.00	~~~~~	6030.01	120010
	Mon 03/11/2013	16:30	0.00	~~~~~	6030.01	120010
- Exceptions:** A table listing timecard exceptions.
 

Posted	Description	Type	Created
03/11/2013	No Lunch Attestation answer was provided for the entire continuous shift	Calculation	03/15/2013 16:23
03/11/2013	An Odd Clocking was detected	Calculation	03/15/2013 16:23
- Labor Distributions:** A section for viewing labor distribution details.
- Benefit Balances:** A section for viewing benefit balances. A red circle highlights this section, and a yellow box contains the text: "To view current PTO/XSL Balance, expand the Benefit Balance section." Below this, it shows:
 

Category: PTO	Beginning Balance: 0.00000	Ending Balance: 0.00000
Category: XSL	Beginning Balance: 0.00000	Ending Balance: 0.00000
- Daily Hours summary for Week 1 and Week 2:** A table showing hours worked for Unit 6030.01 and Job Class 120010.
 

Unit 6030.01	Job Class 120010							
Week 1	Week 2	Su	Mo	Tu	We	Th	Fr	
REQ			5.00					
Total Worked			5.00					

Σ = Accumulates toward worked hours

➤ **Time/Data Input Tables – 24 Hour Conversion Table**

<b>Regular Time</b>	<b>Military Time</b>
1:00am	0100
2:00am	0200
3:00am	0300
4:00am	0400
5:00am	0500
6:00am	0600
7:00am	0700
8:00am	0800
9:00am	0900
10:00am	1000
11:00am	1100
12:00pm (noon)	1200
1:00pm	1300
2:00pm	1400
3:00pm	1500
4:00pm	1600
5:00pm	1700
6:00pm	1800
7:00pm	1900
8:00pm	2000
9:00pm	2100
10:00pm	2200
11:00pm	2300
12:00am (midnight)	0000

## ➤ 7 Minutes Payroll Rounding Practice

Applies to all clock in/out

Refer to Attendance Policy MA410 and your Supervisor regarding tardiness

Punch-in time range	Time clock rounding	Payroll Hour Equivalent				
6:53 - 7:07	7:00	7.00				
7:08 - 7:22	7:15	7.25				
7:23 - 7:37	7:30	7.50				
7:38 - 7:52	7:45	7.75				
7:53 - 8:07	8:00	8.00				
Punch-in time range	Time clock rounding	Payroll Hour Equivalent				
19:23 - 19:07	19:00	19.00				
19:08 - 19:22	19:15	19.25				
19:23 - 19:37	19:30	19.50				
19:38 - 19:52	19:45	19.75				
19:53 - 20:07	20:00	20.00				
<u>Lunch Break Rounding:</u>			<u>Example:</u>			
Punch-in time range	Time clock rounding		Clock Out	Clock In	Lunch Length	Time Clock Rounding
11:53 – 12:07	12:00		12:00	12:33	33 min	30 min
12:08 – 12:22	12:15		12:07	12:37	30 min	30 min
12:23 – 12:37	12:30		12:07	12:38	31 min	45 min
12:38 – 12:52	12:45					
12:53 – 13:07	13:00					

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**Payroll/Human Resources Directory**

**Payroll ..... 3405, 3407**

**Human Resources ..... 3607, 3478**

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