How-To Guide

Approve or submit a timesheet

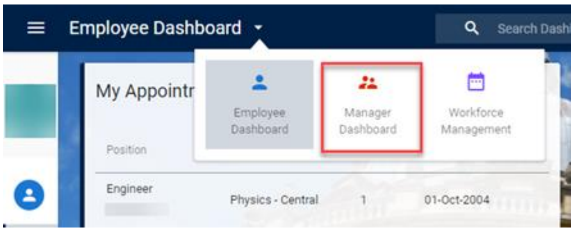
University HUMAN RESOURCES

Who is this guide aimed at?	This guide is for managers who need to approve, reject or submit a timesheet in HR Self-Service.
Useful links and other supporting materials	HR Self-Service guidance and FAQs: www.ox.ac.uk/hrss Information for managers about engaging casual staff: https://hr.admin.ox.ac.uk/casual-workers-and-casual-teachers

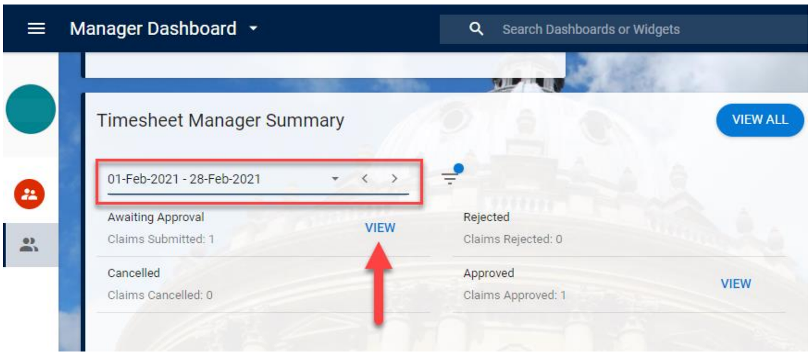
Approve a timesheet

Starting point: Log in to HR Self-Service > Employee Dashboard

1. Click on the Dashboard dropdown menu and select the **Manager Dashboard**.



2. This takes you to the **My Team** screen. Find the **Timesheet Manager Summary** widget.
3. The system will default to the current period (month). If you need to approve timesheets from an earlier period, use the arrows to navigate to the required date.



4. Click on **VIEW** in the **Awaiting Approval** tab. The **Timesheet Summary** page will open.

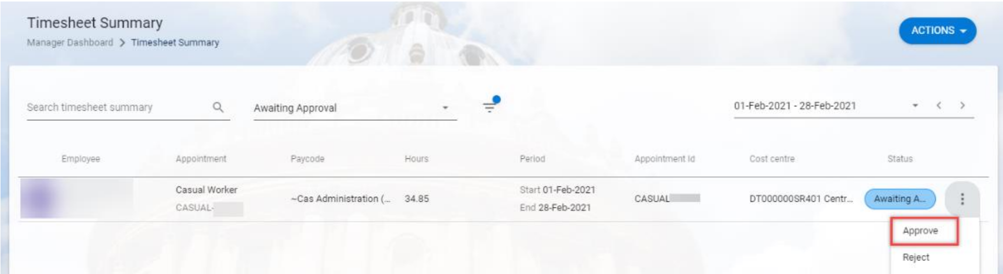
The **Timesheet Summary** screen shows all the timesheets awaiting approval during the period (month).

Review and approve single timesheet

5. Depending on the timesheet, process as follows:
   a. Timesheets for hours worked: Check hours being claimed are accurate, then approve/ reject accordingly (see guidance below).
   b. Timesheets for annual leave for casual workers and variable hours employees: Review holiday being claimed, then approve/ reject accordingly (see guidance below).

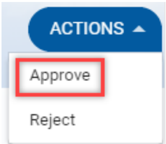
c. Timesheets for annual leave for casual teachers and student ambassadors: **Reject** any holiday being claimed to avoid a duplicate payment. Holiday pay for these roles is included automatically in the system and no further action is needed.

6. If the claim is correct, approve the hours by clicking on the ellipsis (three dots) at the right-hand side of the individual's timesheet and select **Approve**. A success message will appear. Wait for the dark green line to fill.



Approve multiple timesheets

7. Alternatively, once you have reviewed the timesheets, you can approve multiple claims at once by selecting each worker's row that you would like to approve. Once a worker's row has been selected, click on the **ACTIONS** button (top right) and select **Approve**. A success message will appear. Wait for the dark green line to fill.



8. You could also click on the **Select All** button (you must only do this once you have reviewed the timesheets). This will select all the workers in the **Timesheet Summary** row, then click on the **ACTIONS** button (top right) and select **Approve.** A success message will appear. Wait for the dark green line to fill.

9. To view a weekly breakdown of the hours, select **Input Time.** The **Timesheet Input** screen opens.

10. Use the **week-commencing date** top right to navigate through the weekly timesheets to view a weekly breakdown of the hours.

11. Click on the white arrow, top left to return to your **Timesheet Manager Summary.**

12. Click on **VIEW** in the **Approved tab**. This will open the **Timesheet Summary** page, which will confirm that the hours are **Approved.**

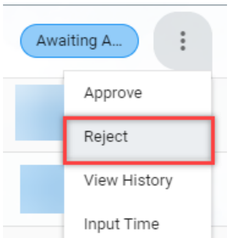
Reject a timesheet

If a timesheet is incorrect, you can reject it. This will return it to the casual worker, to amend.

Starting point: Log in to HR Self-Service > Manager Dashboard > Timesheet Manager Summary > Awaiting Approval > View > Timesheet Summary > Locate individual

Note * Before you reject an individual's hours, check you have selected the right date. Use the arrows to navigate to your chosen week and then reject the hours.

Note * If someone submits more than a week timesheet for approval (eg a months' worth of timesheets submitted together). The manager will be able to reject or approve the whole claim but not pick and choose which parts to reject. That is the reason we recommend people to submit timesheets weekly.



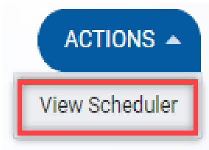
1. Click on the ellipsis (three dots) at the right hand side and click **Reject**.
2. A **Comments box** will open. Add your comments for rejecting the timesheet and click **OK.** A success message will appear. Wait for the dark green line to fill.
3. Click on the white arrow (top left) to return to your **Timesheet Manager Summary.**
4. Click on **VIEW** in the **Rejected** tab to confirm the timesheet has been rejected.

Submit a timesheet for hours worked or holiday pay

As a manager, you can submit a worker's timesheet in exceptional cases where they are unable to do so themselves.

Note * Before you enter any hours, double check you are entering them for the right date. Use the arrows to navigate to your chosen week and then enter your hours.

Starting point: Log in to HR Self-Service > Employee Dashboard > Manager Dashboard



1. From the **My Team** widget on the **Manager Dashboard**, click the **ACTIONS** button in the top right corner.
2. Select **View Scheduler** from the dropdown. This will open the Team Scheduler screen.
3. Search for the relevant employee. If the employee has multiple appointments within your team, ensure you select the correct appointment.
4. Select the correct **week-commencing date** for the hours you wish to submit.
5. Click on the shaded date columns and select **Timesheet Input**. This will open the **Timesheet Input** screen.
6. Click the **ADD** button (middle right).
7. Click under the **PAY CODE** to select the drop-down arrow. Select the right ~CAS – role and enter the hours under the date columns. Check the total hours are correct.

> ⚠ **Note:** If **paying holiday pay**, select **~Cas Holiday Pay (Hrs)** [NB this code can only be used for casual workers and variable hours employees but NOT casual teachers or student ambassadors who receive rolled-up holiday pay automatically against each hour of work claimed.]

> ⚠ **Note** * Remember when a casual worker submits a timesheet, their pay code options are restricted. As a manager, you have access to all pay codes, so must be careful to select the correct code.

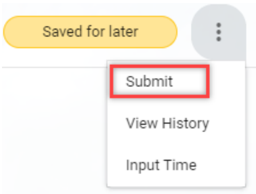
8. Click on the **SAVE** button at the bottom right corner. A success message will appear - wait for the dark green line to fill. You would need to wait for the timesheet approval workflow, which takes about 15 minutes.

9. Click on the **Manager Dashboard** breadcrumb (top left) to navigate to your **Timesheet Manager Summary** screen.

10. Select the right **period (month)** to view the correct summary page.

11. Click on **VIEW** in the **Saved For Later** tab. The **Timesheet Summary** page will open. If the timesheet is not found here, click the filter icon on the **TimeSheet Manager Summary** screen and slide the toggle on for the **Saved For Later** option and try again.

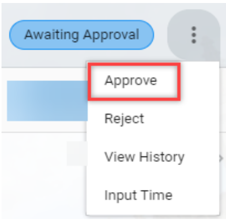
12. Select employee and check the **total** hours worked are correct. Then click on the ellipsis (three dots) at the right hand side and click **SUBMIT.** A success message will appear. Wait for the dark green line to fill.



13. Click on the white arrow (top left) to return to your **Timesheet Manager Summary**.

14. You will need to wait for the timesheet approval workflow, which takes about 15 minutes. Then click on **VIEW** in the **Awaiting Approval** tab.

15. Select the employee and click on the ellipsis (three dots) at the right hand side and click **Approve** - a success message will appear. Wait for the dark green line to fill.



16. Click on the white arrow, top left to return to your **Timesheet Manager Summary**.

17. Click **VIEW** in the **Approved** tab. The employees' timesheet has now been submitted and approved.

Identify annual leave accrual

To identify the amount of annual leave a **casual worker** or **variable hours employee** has accrued, follow the steps below.

Note * Please note the following interim system issue:

The balance in PeopleXD will continue to accrue annual leave for <u>all staff</u> who have approved timesheets in PeopleXD.

This must not be paid to <u>casual teachers</u> or <u>student ambassadors</u> to avoid duplicate holiday pay. Instead, they will receive a rolled holiday pay allowance.

The balance will <u>not</u> be reduced when the rolled-up holiday pay is paid via the **'Cas Holiday Pay Rolled Up'** allowance and should therefore not be referred to.

Starting point: Employee Dashboard > Manager Dashboard > My Team > Casual member > Ellipsis > View Profile > Time Management > Balance Information