East Missouri Action Agency

TimeStar Reference Manual

Insperity
Time and Attendance

Version 7.05: 03/11

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Employee Routines

How to Login

If you have setup employees with the ability to view and/or enter hours, he/she would access the Insperity TimeStar™ login page. The login page is also where supervisors and administrators of TimeStar™ would login. To access the login page, the employee would enter the URL established for your company. The following page would appear:

The employee would enter his/her user name and password and click Enter or select the Login button to enter TimeStar™. The TimeStar™ version information also appears on the login page.

Request/Approval Process

Insperity TimeStar™ has integrated a request/approval module to minimize data entry by supervisors and administrative personnel. Your company may also use this process to replace a manual paper tracking system in place for paid time off.

Employees must submit requests for leave within TimeStar™. After the employee completes the request, a supervisor will receive an alert that a request has been submitted.

Supervisors may then approve or deny the request made. At the time the request is approved or denied, a supervisor may enter comments or edit any data entered by the employee.

After the supervisor has replied to the request, the employee then receives an alert detailing the supervisor's response.

Once the request is approved, the time will be entered on the worksheet. **Employees do not need to enter this time themselves.**

Please make sure all requests for a period have been approved by a supervisor prior to employee approval of the pay period.

Creating a Request

Time & Attendance - Requests

Employees will make requests for any type of leave taken. After an employee's request has been made, a request alert will appear for the employee's supervisor.

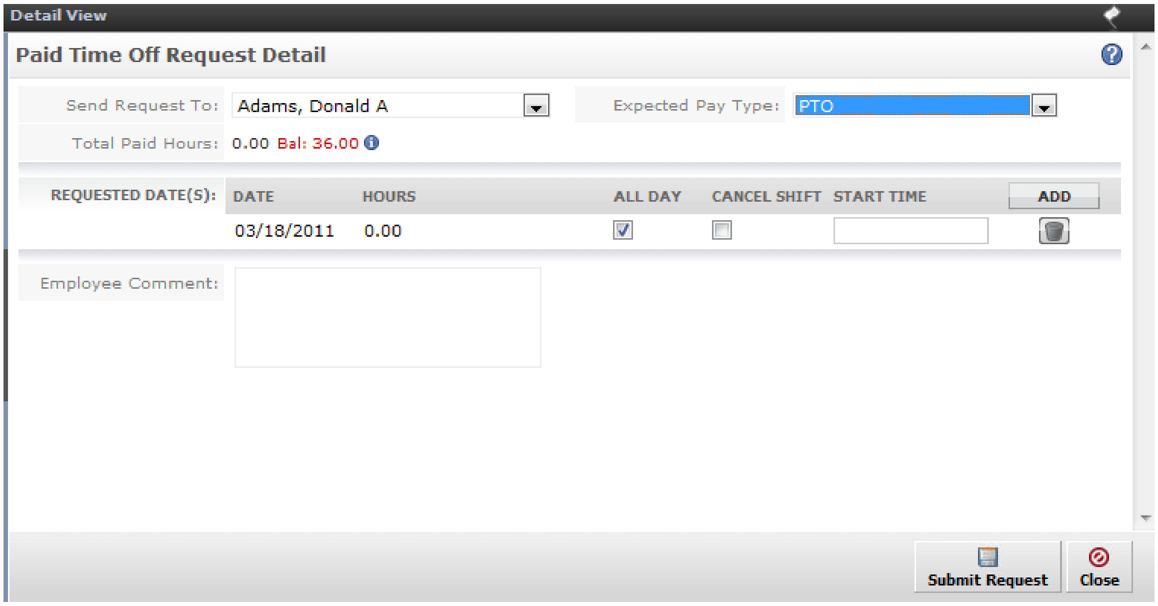
There are two types of requests that can be submitted:

Paid Time Off	Time that will be added to an employee's hours for a pay period (Examples are vacation, sick, bereavement)
General Request	Send a message to a supervisor

When submitting or approving a request, if a user has access to the Schedules- Time Off Calendar page, a  icon will appear on the detail screen so the Time Off Calendar may be accessed when reviewing or entering a request.

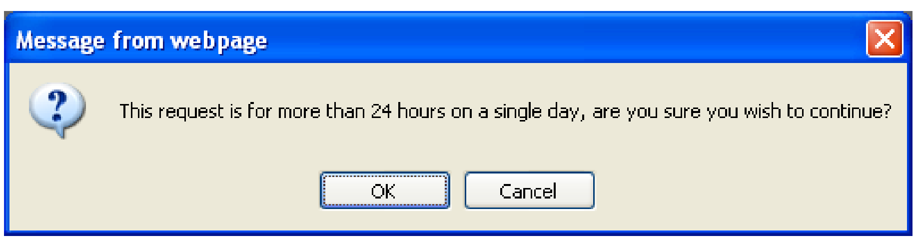
To submit a Paid Time Off request, follow these steps:

1. Login to TimeStar™.
2. Select the Requests option or go to Time & Attendance - Requests on the TimeStar™ menu.
3. Select the New Request button and select New Paid Time Off Request. The following screen displays:



4. Use the drop-down to select which supervisor to send your request to.
5. Use the drop-down to select the type of hours you wish to be paid (these options will be defined by your company's HR or payroll department).
6. Enter the date and number of hours you wish to be paid – it is recommended you enter each day separately. To enter hours for another day, select the Add link.
7. If you have leave for a partial day or a few hours in the middle of the day, please use the employee comment field to enter beginning and ending times.
8. Enter any other comments for your supervisor if you wish.
9. Select Submit Request. You will receive a message that the request has been sent to your supervisor and your request will be listed on the requests page.

Note – If an employee is entering a request for over 24 hours on one day, the following message will display –



If the employee selects OK to this message, the supervisor will receive the same prompt when approving the request. If an employee is requesting more than one day of paid time off, it is recommended that the employee separate out the requested date(s) to ensure schedule deviations and other hours records are created accurately.

After your supervisor has responded to the request(s) you have entered, you will receive an alert in the Requests area on the home page.

Monitoring Requests

After an employee has submitted a request, a supervisor will receive an alert on the TimeStar™ home page when logging in.

Employees may delete pending requests they submit, but a supervisor may not delete a pending request from one of their employees. If a request was sent in error and the employee did not delete the request, the supervisor must Decline the request. Note – pending requests deleted by an employee will be removed from a supervisor's requests screen and will not display with Include Inactive checkbox selected. After a supervisor has replied to the request (either by Approving or Declining the request, the employee's request alert will be updated detailing the response.

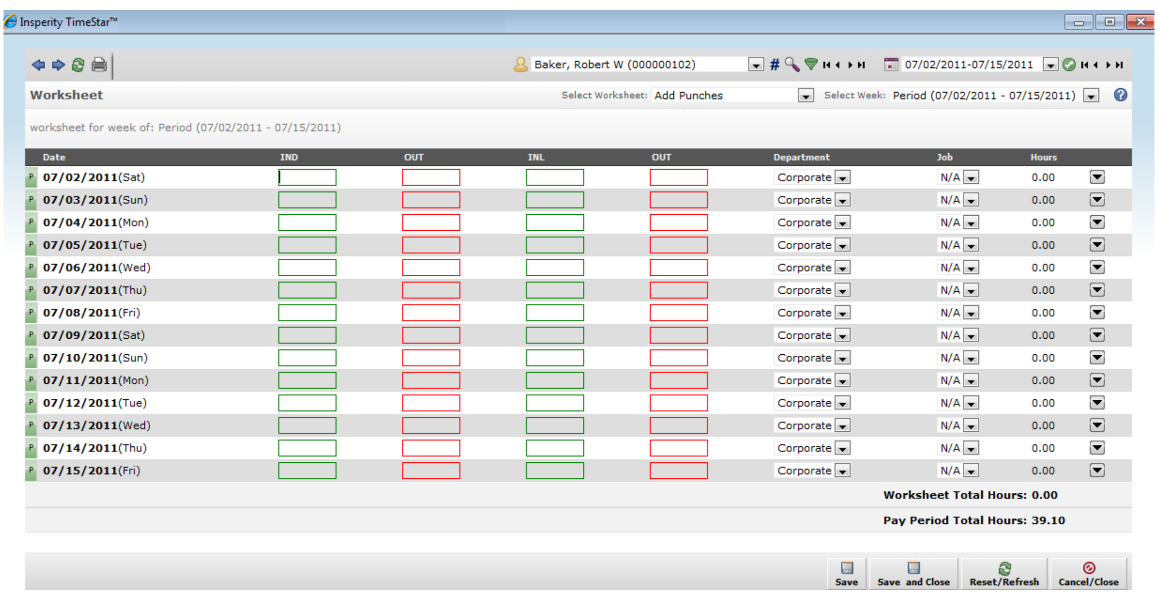
Worksheet Functions

The information in this chapter details the usage of the Worksheet view of the Other Hours screens within TimeStar™. The configuration for this manual assumes that a company has setup a Worksheet to add other hours with organization levels displaying.

Adding Other Hours or Units

Time & Attendance - Other Hours

To add hours via the Worksheet, you may select the **Worksheet button**. When the Worksheet option is selected, the following screen will display. **NOTE: EMAA has defaulted some of the fields shown. The employee may change them if necessary.**



The initial view for this screen is for the entire pay period for the employee selected. You may use the drop-down on the top of the screen to select a different employee or pay period.

In addition, in the far right corner of the screen, you may further filter the listing of dates displayed. The default selection is Period, but it may be changed to the weeks of the pay period.

On the bottom portion of the screen, a running total of hours entered on the Worksheet will be displayed in the Worksheet Total. The total hours for the pay period will be displayed in the Pay Period Total. As you enter hours on the Worksheet, they will add to the pay period total.

To enter other hours, follow these steps:

- Enter the number of hours you wish to add in the Hours column. Once you have entered the hours and tab or click off of the field, the pay type selected under System - Parameters will appear in the Pay Type drop-down.
- If you wish, use the drop-down for pay type and change the pay type.
- Use the drop-downs to select any organization level overrides if applicable.
- Enter daily activities in the comment field; i.e. cleaning, teach classroom, take application, office, meeting, etc.
- If necessary, you may add another line to a day by selecting the button on the right side of the screen. This will enable you to enter an additional other hours record if needed for the day.

Select the Save button to save changes and leave the worksheet open. To save changes and close the worksheet, select the Save and Close button. To clear your entries, select Reset/Refresh. To close the page and cancel any changes, select Cancel/Close.

Time & Attendance Functions

When a date field is selected, a pop-up calendar will appear. The dates available for selection are determined by the security settings "Allowable Range Outside of Current Period – Forward and Backward".

Employee Approval:

After the worksheet is completed, employees must go to the Total Hours tab and approve the period. **Please make sure the supervisor has approved all leave for the period prior to approving the worksheet. Once the worksheet has been approved by the employee the supervisor can no longer approve leave for that period.**

The checkbox may be used to approve the employee's other hours, other dollars*, or total hours by the supervisor. To approve all time for an employee, select supervisor approval on the Total Hours page or you may use the Approvals screen explained later in this chapter.

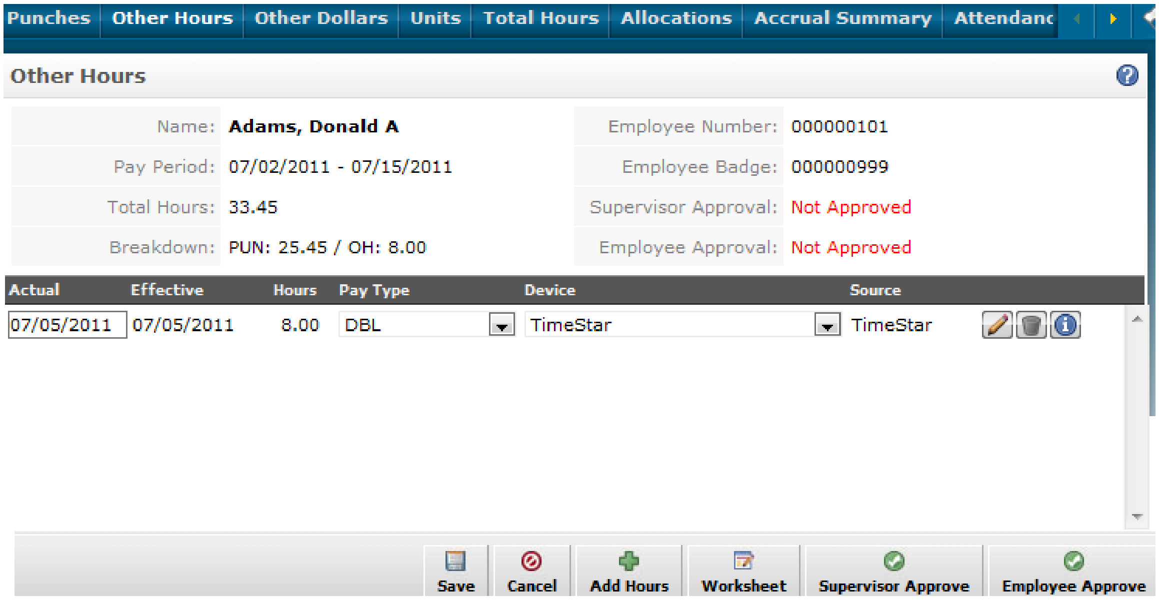
You may select the button to print the information displayed on the panel in a report format.

Note - all screens displayed in the following pages have employee and supervisor approval enabled with a employee/supervisor approval sequence of Either. If your system does not have employee and/or supervisor approval enabled, the checkboxes will not display on the Time & Attendance screens.

***Note-only River Hills employees will use other dollars for tips.**

Other Hours

Time & Attendance - Other Hours



The Other Hours panel can be utilized to enter a block of hours for an employee. Any auto-generated hours, such as salary records or holiday records will appear on this panel.

Field Name	Description
Actual Date	Actual date the hours were earned
Effective	The date that the hours are effective
Hours	Number of hours
Pay Type	Pay type that are applied to the other hours record
Device	Device ID
Source	Source ID
	Select this icon to edit any details of the other hours record
	Select this icon to delete the other hours record
	Select this icon to view the details of the audit log associated with this other hours record.

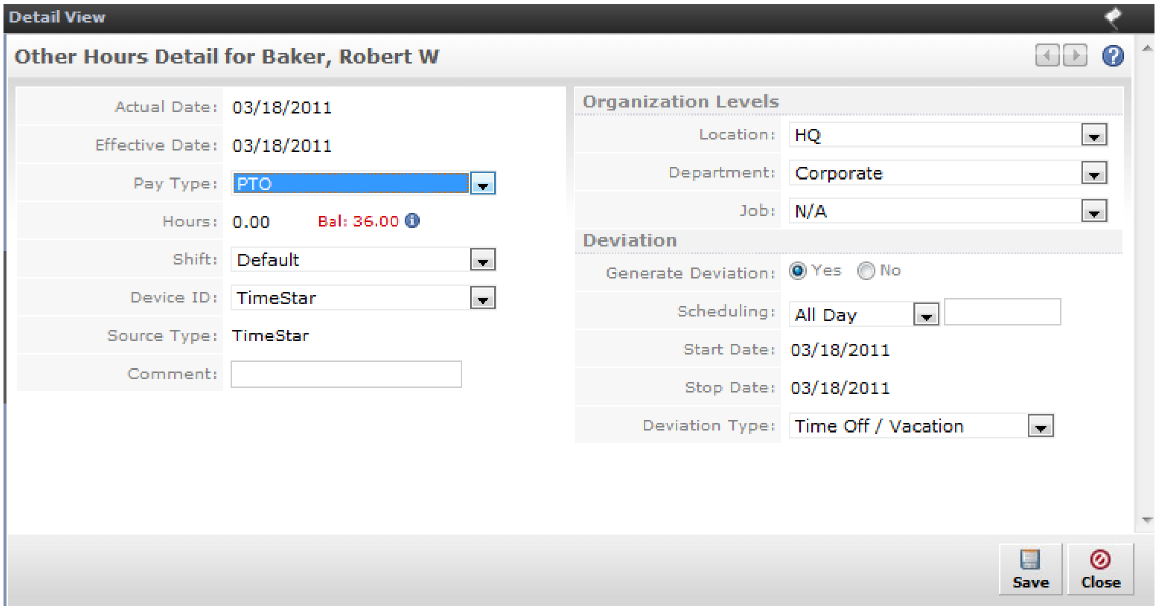
Note – the  icon will not be available for selection on any auto-generated other hours records within TimeStar™ including but not limited to salary and holiday records (see example with screen picture above).

If you wish to adjust hours for these records, you may edit the record or add hours of another pay type which will offset the number of hours for the auto-generated record.

Viewing/Adding/Editing Other Hours

To add other hours

- Click the Add Hours button and the following page displays:



- The minimum requirements to add an other hours record in TimeStar™ are below.
  - Edit the Actual Date to reflect the day you wish to add hours.
  - Use the drop-down to select Pay Type.
  - Enter number of hours.
- Make any additional changes to fields as you wish and click Save.

Field Name	**Description**
Actual Date	Actual date the hours were earned
Effective Date	The date that the hours are effective
Pay Type	Pay type to be applied to the hours
Shift - EMAA does not use this option.	You may use the drop-down to override the shift code awarded with the other hours record
Device ID	The device that the other hours record originated from. When adding an other hours record in TimeStar™, the device ID will be TimeStar.
Source Type	The Source Type defaults to TimeStar.
Comment	Enter any comment you wish to have associated with the other hours record.
Hours	Number of hours to grant the employee with the other hours record
Organization Level Drop-downs	Use these drop-downs to override the organization levels assigned
Auto Generate Schedule Deviation Record	If your company has the parameter 'Auto generate other hours and schedule deviations' set to True, this option will appear. Select Yes to generate a deviation and specify the times of the deviation if applicable.

To edit other hours:

- Click the icon to the right of the record you wish to edit.
- Edit any information you wish.
- Enter comment if you wish.
- Click Save.

Note – other hours records may also be edited on the main Other Hours page without selecting the icon. You may also edit any of the fields that are shown on the main Other Hours page and select Save to apply any changes.

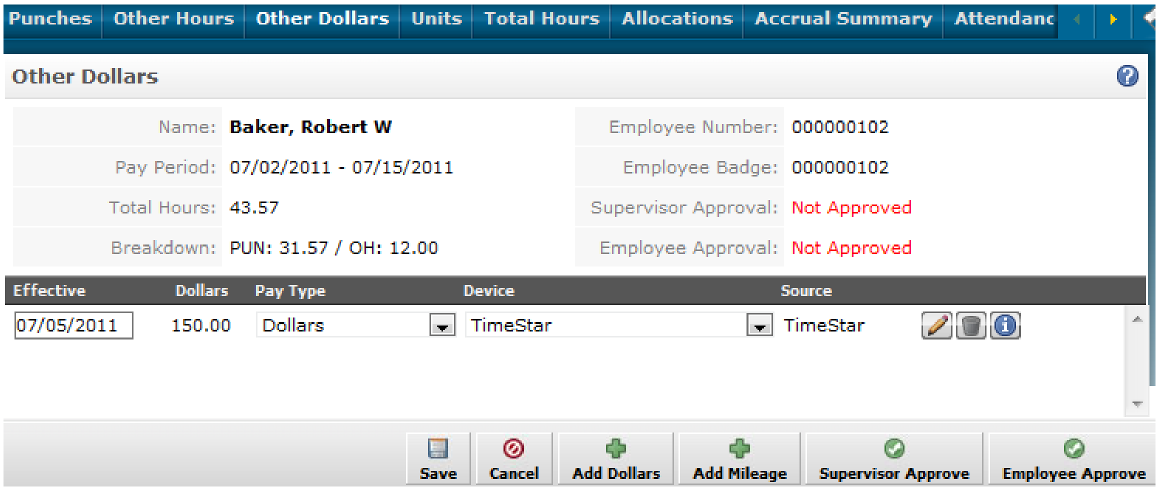
To delete other hours:

- Click the icon to the right of the record you wish to delete.
- You will receive a warning message - if you wish to delete, click OK. If you wish to cancel, click Cancel.

Other Dollars

Only River Hills Employees will use this option.

Time & Attendance - Other Dollars



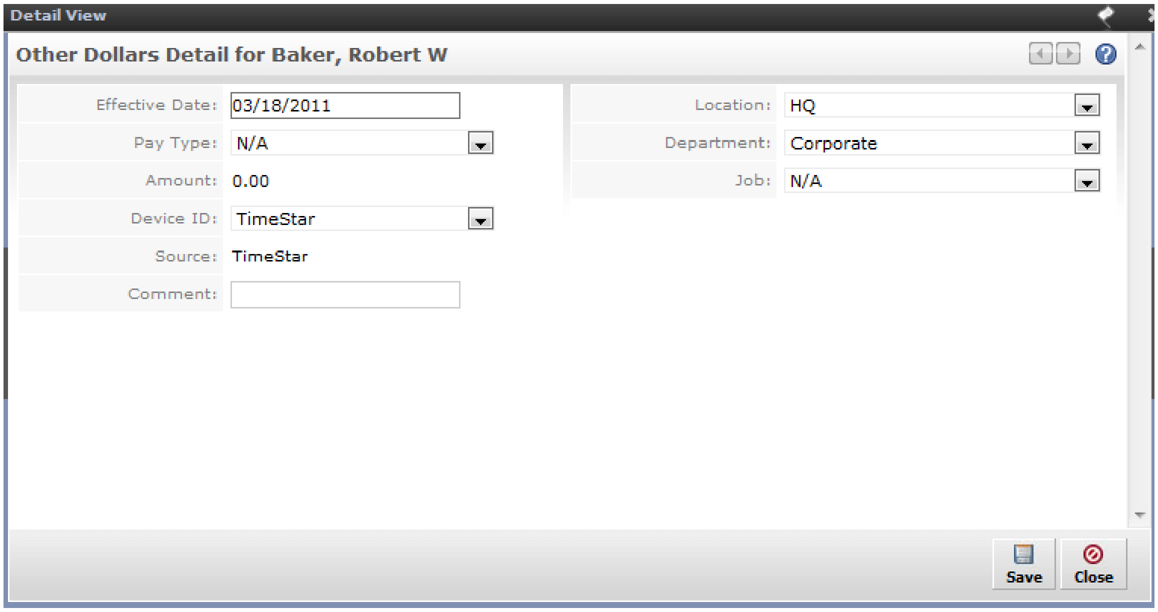
The Other Dollars panel can be utilized to enter dollar amounts within TimeStar™.

Field Name	Description
Effective	The date that the dollars are effective
Dollars	Number of dollars associated with the record
Pay Type	Pay type that are applied to the other dollars record
Device	Device ID
Source	Source ID
	Select this icon to edit any details of the other dollars record
	Select this icon to delete the other dollars record
	Select this icon to view the details of the audit log associated with this other dollars record.

Viewing/Adding/Editing Other Dollars

To add other dollars

- Click the Add Dollars button and the following page displays:



- The minimum requirements to add an other dollars record in TimeStar™ are below.
  - Edit the Effective Date to reflect the day you wish to add dollars.
  - Enter the dollar amount.
- Make any additional changes you wish and click Save.

Field Name	**Description**
Effective Date	The date that the dollars are effective
Pay Type	Pay type to be applied to the dollars
Amount	Number of dollars to grant the employee with the other dollars record
Device ID	The device that the other dollars record originated from. When adding an other dollars record in TimeStar™, the device ID will be TimeStar.
Source Type	The Source Type defaults to TimeStar.
Comment	Enter any comment you wish to have associated with the other dollars record.
Organization Level Drop-downs	Use these drop-downs to override the organization levels assigned

To edit other dollars:

- Click the icon to the right of the record you wish to edit.
- Edit any information you wish.
- Enter comment if you wish.
- Click Save.

Note – other dollars records may also be edited on the main Other Dollars page without selecting the icon. You may also edit any of the fields that are shown on the main Other Dollars page and select Save to apply any changes.

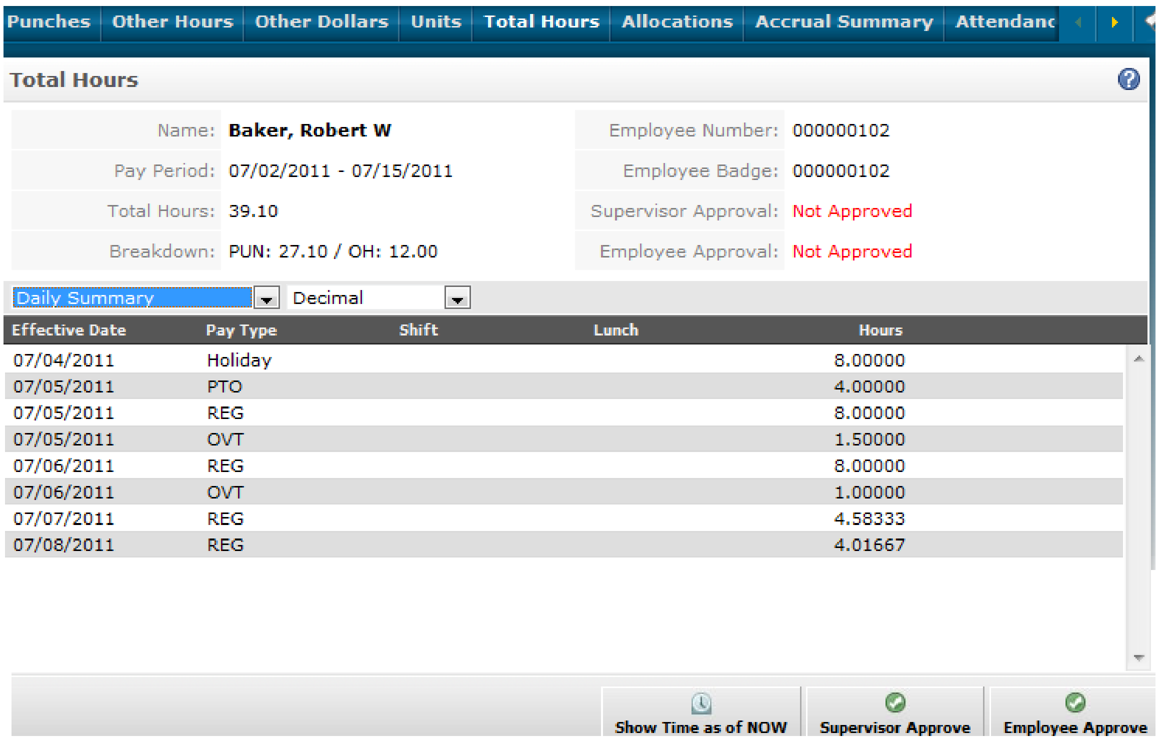
To delete other dollars:

- Click the icon to the right of the record you wish to delete.
- You will receive a warning message - if you wish to delete, click OK. If you wish to cancel, click Cancel.

Total Hours

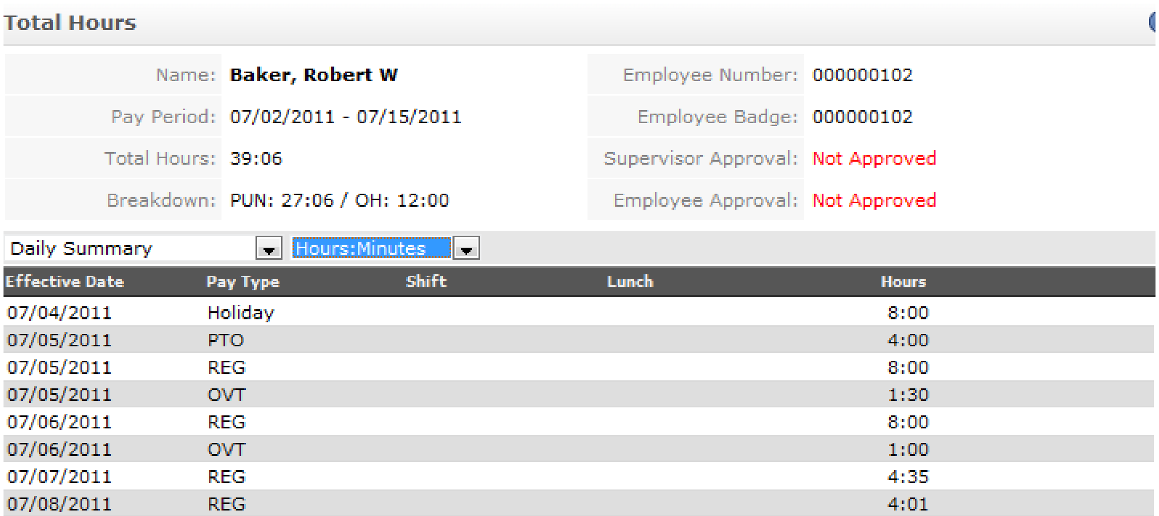
All employees must approve the worksheet for the period.

Time & Attendance - Total Hours



Use the first drop-down to select the Total Hours view you would like to see. Options include Daily Summary, Detail View, Combine by Pay Type, Weekly Summary and Weekly by Pay Type.

Select the second drop-down to change the calculation method of hours. Options under the second drop-down are decimal (as seen above) or hours/min as seen below:



Total Hours

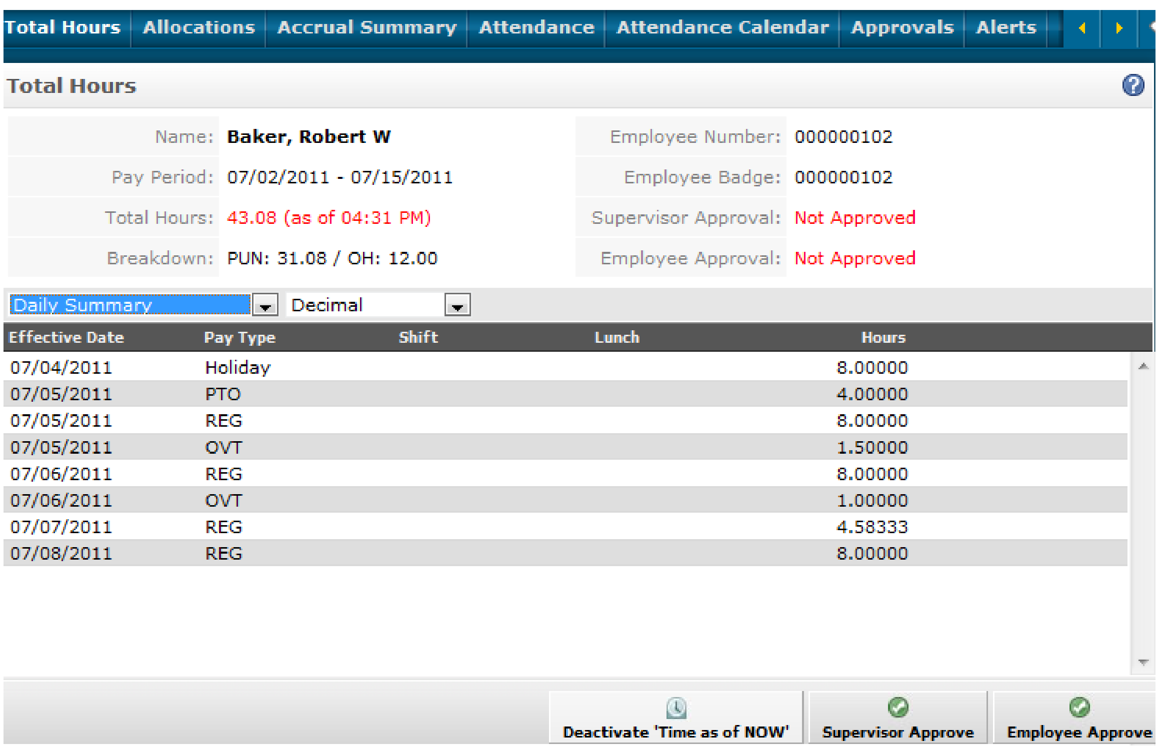
Name:	**Baker, Robert W**	Employee Number:	000000102
Pay Period:	07/02/2011 - 07/15/2011	Employee Badge:	000000102
Total Hours:	39:06	Supervisor Approval:	Not Approved
Breakdown:	PUN: 27:06 / OH: 12:00	Employee Approval:	Not Approved

Daily Summary | Hours:Minutes

Effective Date	Pay Type	Shift	Lunch	Hours
07/04/2011	Holiday			8:00
07/05/2011	PTO			4:00
07/05/2011	REG			8:00
07/05/2011	OVT			1:30
07/06/2011	REG			8:00
07/06/2011	OVT			1:00
07/07/2011	REG			4:35
07/08/2011	REG			4:01

The daily summary view of the Total Hours screen displays hour totals by day separated by pay type and shift.

Select the **Show Time as of NOW** icon to display an employee's total time if the employee were to punch out right now. After the button is selected, the page will update as shown below –



Total Hours | Allocations | Accrual Summary | Attendance | Attendance Calendar | Approvals | Alerts

Total Hours

Name:	**Baker, Robert W**	Employee Number:	000000102
Pay Period:	07/02/2011 - 07/15/2011	Employee Badge:	000000102
Total Hours:	43.08 (as of 04:31 PM)	Supervisor Approval:	Not Approved
Breakdown:	PUN: 31.08 / OH: 12.00	Employee Approval:	Not Approved

Daily Summary | Decimal

Effective Date	Pay Type	Shift	Lunch	Hours
07/04/2011	Holiday			8.00000
07/05/2011	PTO			4.00000
07/05/2011	REG			8.00000
07/05/2011	OVT			1.50000
07/06/2011	REG			8.00000
07/06/2011	OVT			1.00000
07/07/2011	REG			4.58333
07/08/2011	REG			8.00000

Deactivate 'Time as of NOW' | Supervisor Approve | Employee Approve

The default view for the Total Hours page is the daily summary view, as shown above. If you wish to have a different default view for Total Hours other than the daily summary view, please see the Company Setup chapter for the 'Default View – Total Hours' parameter setup.

An alternate view is Detail View that may be selected by using the drop-down in the upper right corner of the screen next to the Quick Report button.

Total Hours

Name:	**Baker, Robert W**	Employee Number:	000000102
Pay Period:	07/02/2011 - 07/15/2011	Employee Badge:	000000102
Total Hours:	39.10	Supervisor Approval:	Not Approved
Breakdown:	PUN: 27.10 / OH: 12.00	Employee Approval:	Not Approved

Detail View | Decimal

Effective Date	Start Time	Stop Time	Pay Type	Shift	Lunch	Hours		
07/04/2011	07/04/2011	07/04/2011	Holiday			8.00000	DETAIL	SOURCE
07/05/2011	07/05/2011	07/05/2011	PTO			4.00000	DETAIL	SOURCE
07/05/2011	07/05 08:00 AM	07/05 11:30 AM	REG			3.50000	DETAIL	SOURCE
07/05/2011	07/05 12:00 PM	07/05 04:30 PM	REG			4.50000	DETAIL	SOURCE
07/05/2011	07/05 04:30 PM	07/05 06:00 PM	OVT			1.50000	DETAIL	SOURCE
07/06/2011	07/06 08:00 AM	07/06 04:00 PM	REG			8.00000	DETAIL	SOURCE
07/06/2011	07/06 04:00 PM	07/06 05:00 PM	OVT			1.00000	DETAIL	SOURCE
07/07/2011	07/07 07:55 AM	07/07 12:30 PM	REG			4.58333	DETAIL	SOURCE
07/07/2011	07/07 12:58 PM	07/07 12:58 PM	REG			0.00000	DETAIL	SOURCE
07/08/2011	07/08 08:00 AM	07/08 10:12 AM	REG			2.20000	DETAIL	SOURCE
07/08/2011	07/08 10:12 AM	07/08 10:26 AM	REG			0.23333	DETAIL	SOURCE
07/08/2011	07/08 10:26 AM	07/08 12:01 PM	REG			1.58333	DETAIL	SOURCE
07/08/2011	07/08 12:32 PM	12/31 06:00 PM	REG			0.00000	DETAIL	SOURCE

The Total Hours detail page displays the employee's hours calculations for each day of the week. For easier viewing, alternate days are shaded in gray.

DETAIL — Select this icon to view the hours calculation detail for the line selected.

SOURCE — Select this icon to view the source for the hours calculated. When this icon is selected, you will be directed to the punches or other hours page with the record highlighted that the total hours page displayed.

An additional view is Combine by Pay Type. Below is an example of the information that would display on this page for an employee.

Total Hours

Name:	**Baker, Robert W**	Employee Number:	000000102
Pay Period:	07/02/2011 - 07/15/2011	Employee Badge:	000000102
Total Hours:	39.10	Supervisor Approval:	Not Approved
Breakdown:	PUN: 27.10 / OH: 12.00	Employee Approval:	Not Approved

Combine by Pay Type | Decimal

Pay Type	Hours
Holiday	8.00000
PTO	4.00000
REG	24.60000
OVT	2.50000

The next option available is Weekly Summary. This view will display the total hours for the employee by week. The employee's pay group determines the week start day. An example of the page that will display is below:

Total Hours

Name:	**Baker, Robert W**	Employee Number:	000000102
Pay Period:	07/02/2011 - 07/15/2011	Employee Badge:	000000102
Total Hours:	39.10	Supervisor Approval:	Not Approved
Breakdown:	PUN: 27.10 / OH: 12.00	Employee Approval:	Not Approved

Weekly Summary | Decimal

Week	Hours
Week 1 (07/02/2011-07/02/2011)	0.00000
Week 2 (07/03/2011-07/09/2011)	39.10000
Week 3 (07/10/2011-07/15/2011)	0.00000

The last option available is Weekly Summary by Pay Type. This view will display the hours for the employee by week broken out by pay type. The employee's pay group determines the week start day. An example of the page that will display is below:

Total Hours

Name:	**Baker, Robert W**	Employee Number:	000000102
Pay Period:	07/02/2011 - 07/15/2011	Employee Badge:	000000102
Total Hours:	39.10	Supervisor Approval:	Not Approved
Breakdown:	PUN: 27.10 / OH: 12.00	Employee Approval:	Not Approved

Weekly by Pay Type | Decimal

Week	Pay Type	Hours
Week 1 Total:		**0.00000**
Week 2 (07/03/2011-07/09/2011)	Holiday	8.00000
	PTO	4.00000
	REG	24.60000
	OVT	2.50000
Week 2 Total:		**39.10000**
Week 3 Total:		**0.00000**

Accrual Summary

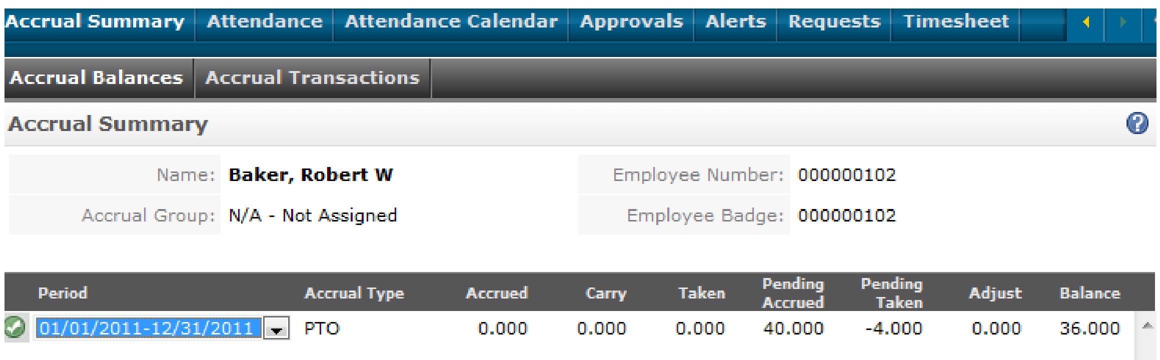
Within TimeStar™, you may choose to transfer accrual balance information from an outside application, or calculate accrual data within the system.

TimeStar™ may be setup to deduct hours taken from the different accrual plans. Accruals may also be setup to calculate based on employee eligibility.

If you wish to have TimeStar™ setup to deduct taken time from accruals or calculate accruals, please contact an Insperity Time and Attendance Professional Services Representative for assistance.

Viewing/Adding/Editing Accrual Information

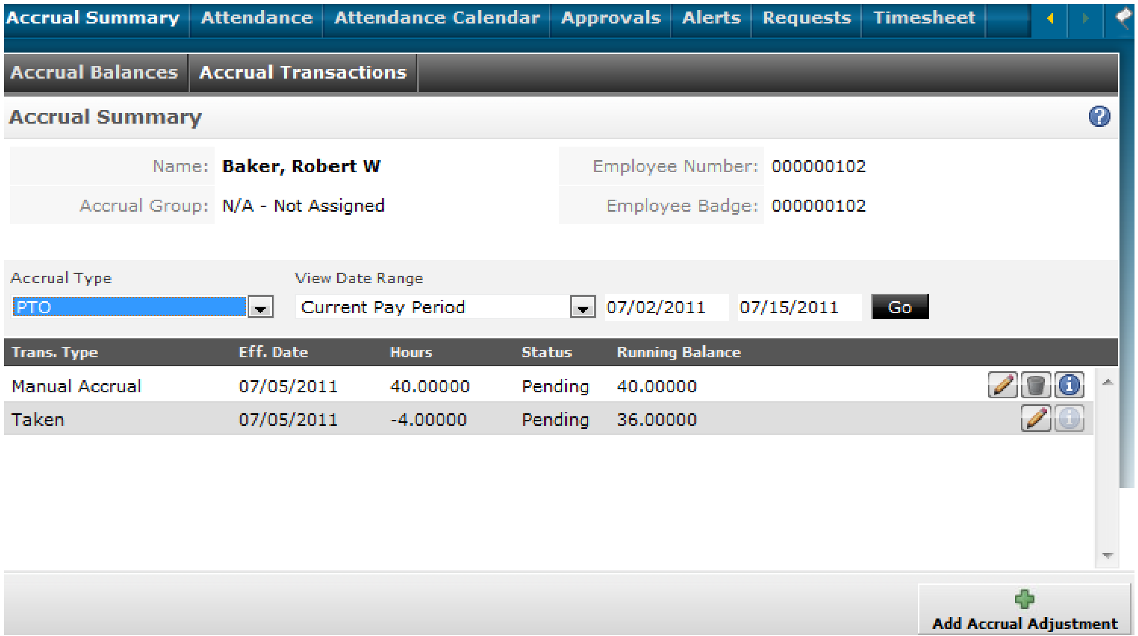
Time & Attendance - Accrual Summary



The Accrual Summary panel has 2 views. The default view is the balance summary view, shown above. On this page, you have the ability to view balance information for each accrual plan assigned to an employee. You may use the Accrual Period drop-down to view accrual information for the previous and next accrual periods if you wish.

Field Name	**Description**
Period	The accrual period for the balance displayed. Select the drop-down to switch accrual periods to view balance information.
Accrual Type	The accrual plan defined in Company – Accrual Plans.
Accrued	Hours that have been accrued in previous pay periods.
Carry	Carryover hours from previous accrual years.
Taken	Hours that have been taken in previous pay periods.
Pending Accrued	Hours that are set to become accrued in the current period or in future pay periods.
Pending Taken	Hours that are set to be taken in the current period or in future pay periods.
Adjust	The total hours of manual adjustment records. These adjustment records may have been entered by a user or created during a conversion from an earlier version of TimeStar™.
Balance	The current balance for the accrual plan.

The other view on the Accrual Summary page is Accrual Transactions. To change to this view, select the Accrual Transactions tab. An example of the Accrual Transaction view is below.



On this page, all accrual transactions will appear in a sequential list by effective date. Specific date ranges may be specified to view this page.

When this page is initially selected, the first accrual plan's transactions for the current pay period will be displayed. Use the Transaction Type drop-down to switch to another accrual plan. Use the View Date Range drop-down to view transactions by a different date range.

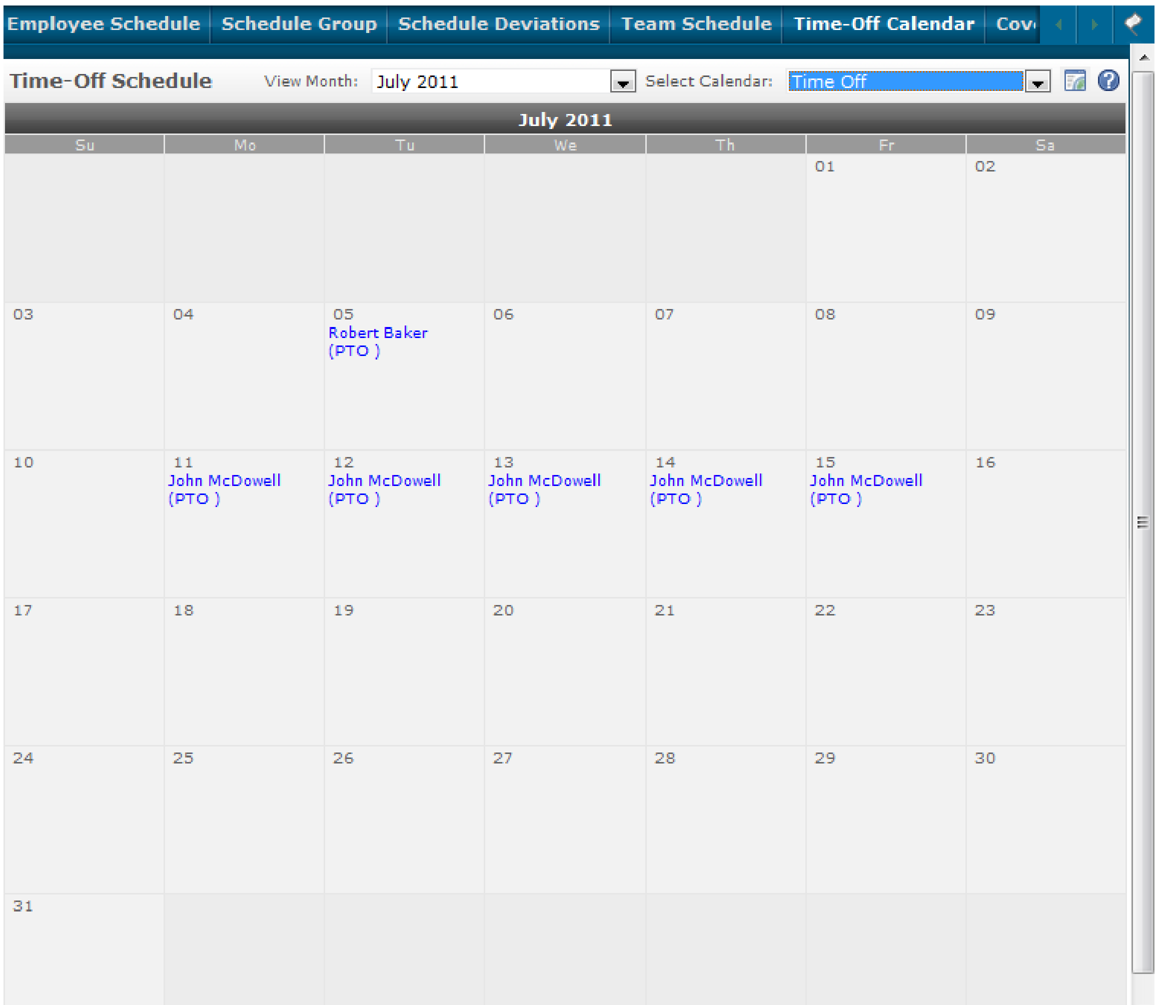
Field Name	**Description**
Trans.Type	The type of accrual transaction. Available transaction types include Accrual, Accrual Adjustment, Beginning Balance, Carryover, Carryover Adjustment, Expired, Manual Adjustment, Taken and Taken Adjustment.
Eff. Date	The effective date for the transaction type.
Hours	The hours amount of the transaction.
Pending	Indicator if the transaction is pending (taken or accrued in the current period or into the future). Transactions that are pending will be denoted with 'Pending' in the Pending column. Transactions that are no longer pending will be denoted with 'Closed' in the Pending column.

Time-Off Calendar

Schedules – Time-Off Calendar

The Time-Off Calendar provides a calendar view of other hours transactions and/or schedule deviations for a group of employees. This calendar is configurable under Company –Time-Off Calendar Setup.

An example of the Time-Off Calendar is below:



Employee Contact Information

The employee is responsible to keep this page updated.

The Contact Information page displays address, phone, emails and emergency contact information.