Payroll Approver & Time Approver Job Aid

This job aid covers the following information for monthly benefits eligible employees only:

- Managing Schedules
- Approving Time (Absence Requests)
- Adjusting an Approved Absence Request

Managing Schedules

**Step #1:** Login to PeopleSoft [www.my.uh.edu](http://www.my.uh.edu)

**Step #2:** Select

**Step #3:** From the Main Menu navigate the following path:
Manager Self Service>Time Management>Manage Schedules>View Schedules

The following entry box will appear:

### Weekly Schedules

<table>
<thead>
<tr>
<th>Employee Selection Criteria</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>Group ID</td>
<td></td>
</tr>
<tr>
<td>Empl ID</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** You will either need your monthly Group ID or Empl ID to get your assigned employee listing.

1. **Time Saving Tip:** Enter in your monthly Group ID and click on the **Save Selection Criteria** button. This will save your monthly Group ID number in the value box so that it will auto-populate for you the next time you access the Weekly Schedules view. By entering your monthly Group ID the entire monthly benefits eligible employee roster, for those assigned to you, will appear.

Once you have entered in the necessary information (Monthly Group ID/Empl ID) click on the **Get Employees** button. Your employee roster will appear.

**Step #4:** Review the listed schedule for each employee on your roster.

- If the default schedule listed is correct you do not need to update or change the schedule.
- If an employee works a different schedule it will need to be corrected/updated.

**Step #5:** To change/update an employee schedule, from the Main Menu navigate the following path:
Manager Self Service>Time Management>Manage Schedules>Assign Work Schedules
- Enter the search criteria to search for the employee and click “Search”
- Select the Employee by clicking on their name

**Assign Work Schedule**

Enter any information you have and click Search. Leave fields blank for a list of all values.

### Find an Existing Value

**Search Criteria**

- **Empl ID:**
- **Empl Rcd Nbr:**
- **Name:**
- **Last Name:**
- **Business Unit:**
- **Department:**
- **Organizational Relationship:**

[Case Sensitive]

[Search] [Clear] [Basic Search] [Save Search Criteria]

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**Step #6: Assign Work Schedule**

- On the first top row of the assigned schedules, click on the [ ] to add update/change the schedule, and a new row will appear.

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Assignment Method</th>
<th>Schedule Group</th>
<th>Schedule ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/05/2013</td>
<td>Use Default Schedule</td>
<td>BASE</td>
<td>PMF8/5</td>
<td>P MF8:00A-5:00P 12:00N-1:00P</td>
</tr>
<tr>
<td>03/05/2013</td>
<td>Use Default Schedule</td>
<td>BASE</td>
<td>PMF8/5</td>
<td>P MF8:00A-5:00P 12:00N-1:00P</td>
</tr>
</tbody>
</table>

- Select the effective date for the schedule change to occur. (item #1)
- From the Assignment Method column, choose **Select Predefined Schedule** from the available dropdown menu as indicated below. (item #2)
- After updating the Assignment Method, click on the magnifying glass (item #3) to open a list of schedule options.
• Schedule Options Include:

<table>
<thead>
<tr>
<th>Schedule ID</th>
<th>Description</th>
<th>Date</th>
<th>ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>E6HRS</td>
<td>EM-F 6 Hour Day</td>
<td>8/31/2011</td>
<td>E-6Hrs</td>
</tr>
<tr>
<td>E8HRS</td>
<td>EM-F 8 Hour Day</td>
<td>8/31/2011</td>
<td>E-8 Hrs</td>
</tr>
<tr>
<td>EMF8</td>
<td>Elapsed 8-Hr Day</td>
<td>8/17/2011</td>
<td>E/8</td>
</tr>
<tr>
<td>EF4</td>
<td>EF 4-Hr Day</td>
<td>8/31/2011</td>
<td>EF4</td>
</tr>
<tr>
<td>EMF6</td>
<td>Elapsed 6-Hr Day</td>
<td>8/29/2011</td>
<td>E/6</td>
</tr>
<tr>
<td>EWF8S6</td>
<td>E W-F8H Sa6H</td>
<td>8/31/2011</td>
<td>EWF8S6</td>
</tr>
<tr>
<td>EMF10</td>
<td>Elapsed 10-Hr Day</td>
<td>8/29/2011</td>
<td>E/10</td>
</tr>
<tr>
<td>EMF4</td>
<td>Elapsed 4-Hr Day</td>
<td>8/29/2011</td>
<td>E/4</td>
</tr>
<tr>
<td>EMTH10</td>
<td>EM-Th 10-Hr Day</td>
<td>8/31/2011</td>
<td>EMTh10</td>
</tr>
<tr>
<td>E9HRS</td>
<td>EM-Th 9 Hour Day</td>
<td>8/31/2011</td>
<td>E-9Hrs</td>
</tr>
</tbody>
</table>

Note: For monthly benefits eligible (MBE) employees, you will only be able to select a schedule ID that begins with an “E”.

Step #7: Click on the button to save your updated/corrected schedule.

Step #8: Confirm updated/corrected employee schedule.

• Click on the link on the row for the updated/corrected schedule, or return to the View Schedules page to review the updates made to your employee roster.

Note: No further changes are required at this time. If an employee’s schedule changes in the future, simply repeat the steps outlined above and update their schedule accordingly.

Approving Time (Absence Requests)

Step #1: Login to PeopleSoft at www.my.uh.edu, unless you are already in the system.

Step #2: Select

Step #3: From the Main Menu navigate the following path:
Manager Self Service>Time Management> Approve Time and Exceptions> Absence Request

• As the Time Approver (TA), you will be able to view Absence Requests in three different status types.
  o Status Types: Pending, Approved, or Denied
• If there are no results to display, please select a different status and click on the refresh button.
• Under the Pending status the list of pending Absence Requests will be listed by displaying the employees name, Empl ID, title, absence name, and all dates related to the request.

**Step #4:** Review Absence Request(s)

• Click on the employees name to review each absence request.
  
  • Note the start date, end date, absence name, reason and duration of leave requested. (item #1)
  
  • The current balance of the specific leave type being requested is listed. (item #2)
  
  • If any comments were entered by the requestor they will be listed. (item #3)
  
  • As the time approver (TA) you may enter comments. Comments should be entered for any absence request that is denied or pushed back. (item #4)
  
  • Once all information has been reviewed, take the appropriate action of approving, denying, or pushing the absence request back to the requestor. (item #5)

**Adjusting an Absence Request**

**Step #1:** Login to PeopleSoft at [www.my.uh.edu](http://www.my.uh.edu), unless you are already in the system.

**Step #2:** Select

**Step #3:** From the Main Menu navigate the following path:
Manager Self Service>Time Management>Report Time>Timesheet

**Step #4:** View Employee Timesheet

• Enter Empl ID (item #1) and click “Get Employees” (item #2)
• Click Employee name to bring up the timesheet (item #3)
Step #5:

- Delete or change in Absence Management. If the absence has already been approved, the time must be changed on the timesheet.
- Absences on the timesheets are view only, they must be adjusted by adding additional entries.
- Click on the plus sign on the row where you wish to adjust the time (item #4) This will add a row below the entry.

Step #6

- Select the correct Time Reporting Code (TRC) from the drop down menu(item #5).
  - For a vacation adjustment, select B71-Vacation Adj.
Step #7:
- In the quantity field, select the number of hours to reverse. (item #6)
  - This time will need to be negative since you will be taking away the hours.

```
<table>
<thead>
<tr>
<th>Time Reporting Code</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>171 - Vacation</td>
<td>8.00</td>
</tr>
<tr>
<td>B71 - Vacation Adj</td>
<td>-8.00</td>
</tr>
</tbody>
</table>
```

Step #8
- Click the plus sign to add an additional row for a new entry.
- Add the correct TRC.
  - If it is an adjustment from vacation hours to sick hours, select the TRC B81-Sick Adj (item #7).
- Add the hours for the new leave; this number will be positive.

```
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</tr>
<tr>
<td>B81 - Sick Adj</td>
<td>8.00</td>
</tr>
</tbody>
</table>
```