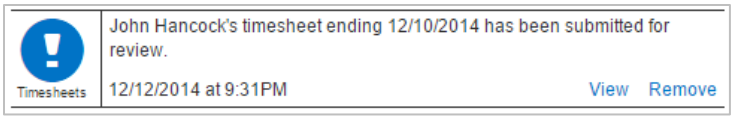
GreenEmployee.com

Reviewing Timesheets and Time Off Requests

This quick-start guide explains how a manager may review time off requests and completed timesheets submitted by their employees

Locating Documents that Require Your Review

There are a few different ways to locate the time off request or timesheets which are pending your review. First, you may setup email notifications (under Manager Alerts) which will send you an email any time a document has been submitted to you for review. Second, you may see them via Tasks in the Tasks and Notifications widget on your homepage. A new message (similar to the one below) will be generated each time a new time off request or timesheet is submitted for your review. Either of these options will take you directly to the request or timesheet.

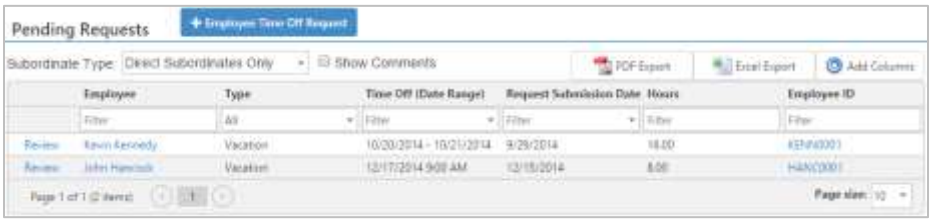


Lastly, you may access requests via Employee Management. This will allow you to see the current number of time off request and timesheets awaiting your review. You may wish to use this approach to conduct weekly checks of any documents pending your review.

Time Off Requests

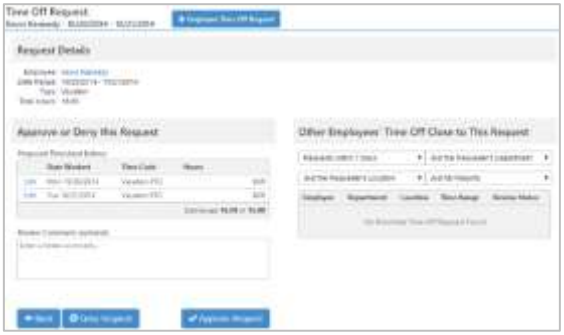
Viewing the List of Time Off Requests

After accessing Employee Management, locate the Time Off navigation item on the side nav. If there is a red numerical icon, then you have time off requests to approve. Click on the button to open the "drawer" and click on Pending Requests. On the resulting page, everything in the grid is awaiting your review. The grid provides a quick overview of the request; clicking Review in the row of a request will open up the full request. If you wish, you may filter the list, order it by any column, or export it to PDF or Excel. You may also enter a Request on behalf of an employee from here.



The All Requests page shows all time off requests, including past requests which were accepted or rejected. You may use the drop down in the upper left of the list to filter the requests provided using common criteria such as All Historical, All Future, All Accepted, etc. Furthermore, you may use the filters inside the grid to filter by employee name, department, and other elements.

Reviewing a Specific Time Off Request



When you open a time off request for review, you are provided the date of the request as well as the total and type of hours requested. The employee's comments and current balances are also provided. If the timesheets module is also active, you will be provided a list of proposed timesheet entries derived from the time off requests. If you approve the request, these entries will be automatically added to the employee's timesheet just as they are listed here.

You have the option of adding comments that the employee will see; this will be especially useful when denying a request. To finish, click Approve Request to accept the employee time off request or Deny Request to reject the time off. Employees will be notified of an approval or denial and will be able to review your comments.

If you approve it the time off request will be applied to the employee's timesheet for the appropriate time period. The timesheet will reflect that the time entries were generated by the time off module. You or the employee may be able to edit these timesheet entries if the need arises, depending on your administrator's settings.

Timesheets

Reviewing Timesheets

As timesheets are submitted for your review, you will receive a message in your Tasks and Notification or an email (see the Manager Alerts page). You may review that specific timesheet by clicking View at the end of the message. You may also review a list of timesheets via Employee Management.

Using Employee Management, you are able to see how many timesheets are waiting for your review. Click on the Timesheet Review Center under the Timesheets side nav item to access your employees' timesheets. On this page, you have several sections to manage your employees' timesheets.

Timesheets ending on…

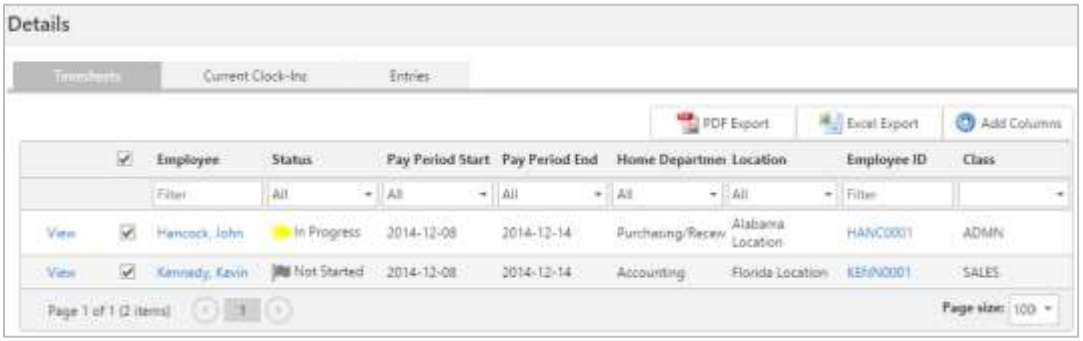
This section contains a quick view of the status of your employees' timesheets. Use the filter above this section to select a pay period; this filter also adjusts the pay period shown for the rest of the page. You may also bulk submit all timesheets currently in progress or bulk approve all timesheets which have been submitted for review from this section.

Warnings

This section shows any warnings for the current pay period. This gives you a quick way of catching problems on any timesheet, plus the ability to view the offending timesheet by clicking on the employee's name. The warning grid will show you the employee's name, the type of problem, the pay period, and the timesheet's status.

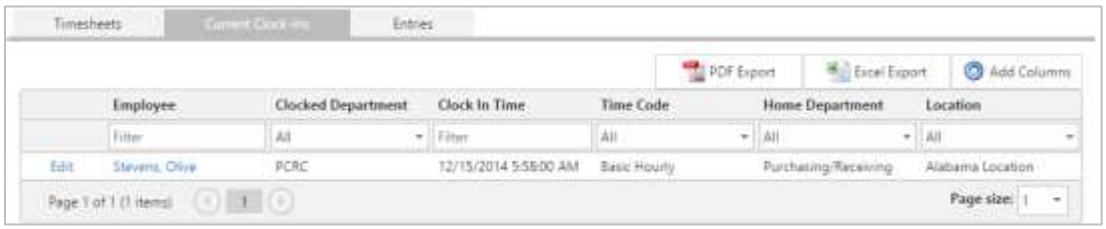
Timesheets

The Timesheets section is the first tab under the Details section. This grid shows you all of the timesheets of your employees for the given pay period, along with their status and other relevant information. You can access any timesheet from this grid with the View link at the left.



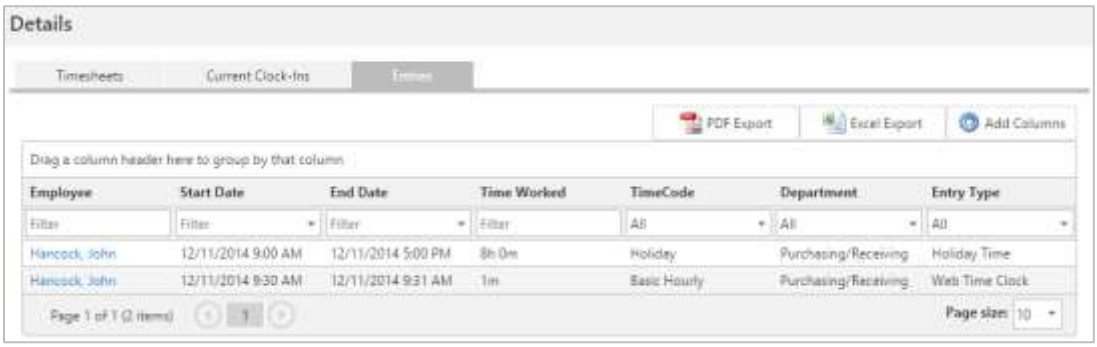
Current Clock-Ins

This tab shows all of currently clocked in employees. This tab has many uses, but a key one is to check for employees who forgot to clock out and clock them out yourself.



Entries

This tab show all timesheet entries for a specific time period. You may use the filters on this page to review current or historical entries, time codes used, departments, and other information across multiple timesheets.



Reviewing a Specific Timesheet

When viewing the current timesheet, the current status of this timesheet is shown at the top. If it has been submitted, when the employee submitted it and any comments will be shown also.

Navigation of the top portion of this page is identical to the Timesheet seen on the employee side. Please see the “Time Clock and Timesheets” Quick Start Guide for more information.

At the end of the timesheet, where the employee has a section to add entries, you will see a “Review Timesheet” section. You may add comments related to your decision and approve or deny the timesheet. The employee and HR/Payroll administrator will be able to view the timesheet and any comments left. The employee will be notified of the approval or denial.