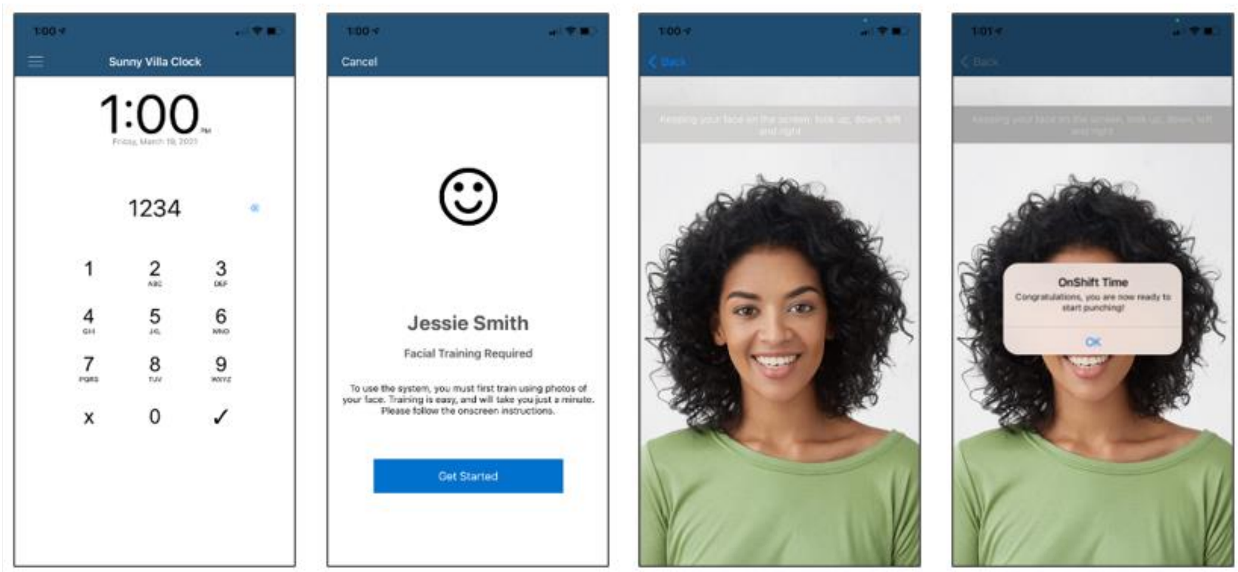
# OnShift Time User Guide

This User Guide details the basic steps you need to start navigating and using OnShift Time. Use the Table of Contents on the next page to quickly jump to a specific section.



# Table of Contents

## Getting Started

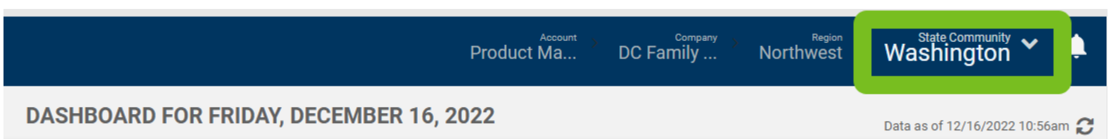
Log in to OnShift Time by going to https://time.onshift.com/login. You will log in with your email address and a generic password provided to you. Once you log in, you can create a new password from your profile.

## Hierarchy Navigation

It is important to understand **hierarchies** and how they relate to navigating your organization in OnShift Time. Hierarchies are simply the distinct levels of access you and other administrators have in OnShift Time and are set up based on your company's organizational structure. The information you see is determined by your hierarchy level. You can request higher level access via your corporate team.

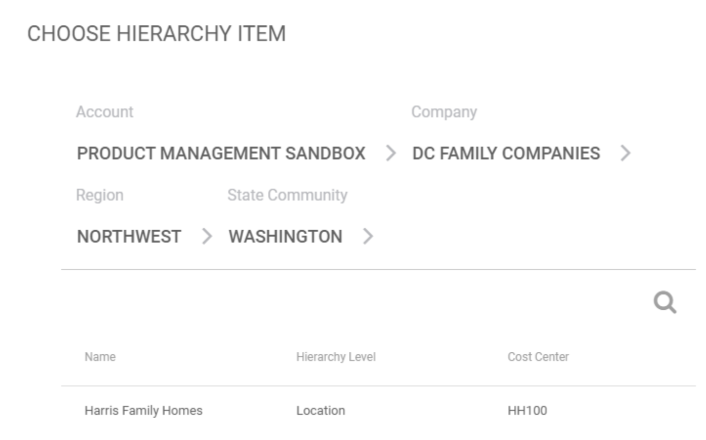
The **hierarchy bar** will remain static and accessible at the top of the screen throughout your session.

**Step 1:** To select a **hierarchy** to work in, **select the dropdown arrow** on the upper right.

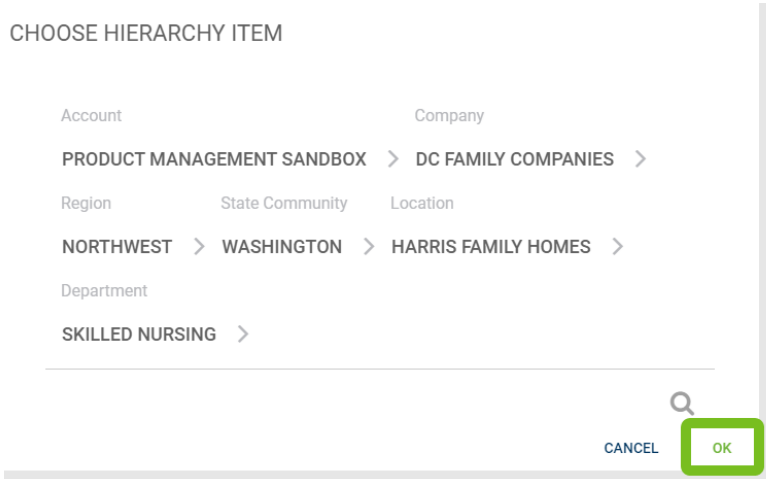



**Step 2:** Once expanded, you will see any available **hierarchy levels** to access. If available, you can enter a higher level by clicking it on the hierarchy bar above or enter a lower level by clicking on the listed item below.

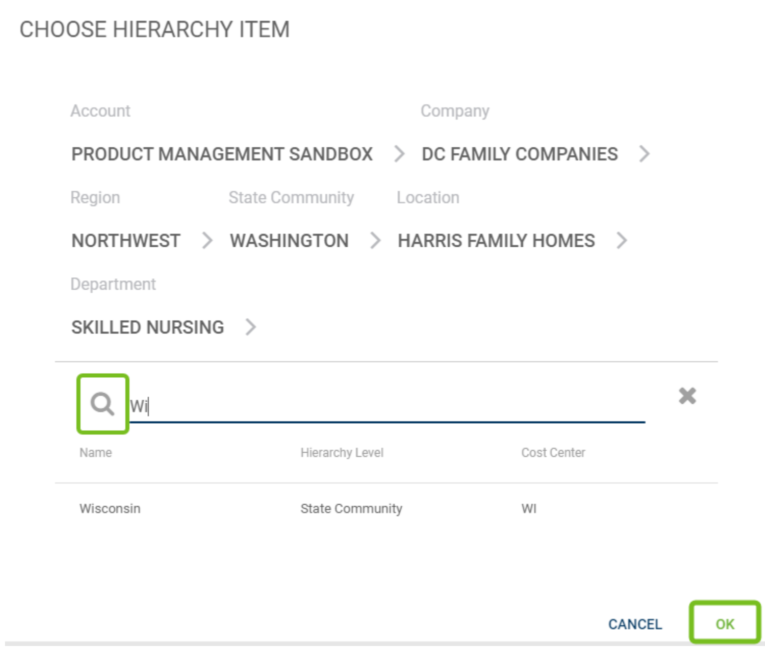
In this example the Region: Northwest is the next hierarchy level above, and Harris Family Homes is the next hierarchy level below.



**Step 3:** Select lower-level hierarchy items until you have reached the item you want to manage, then **click OK**.




You can use the **magnifying glass icon** to pull up a text box and **search** for a hierarchy. If you find the hierarchy you need, navigate to it by clicking it in the search results and then **click OK**.




After you click OK, you will be directed to the **dashboard view** for the selected hierarchy item.

When navigating hierarchies, any grayed-out sections are hierarchies you cannot access, and you'll receive a message stating so if you attempt to view.

## Basic Navigation

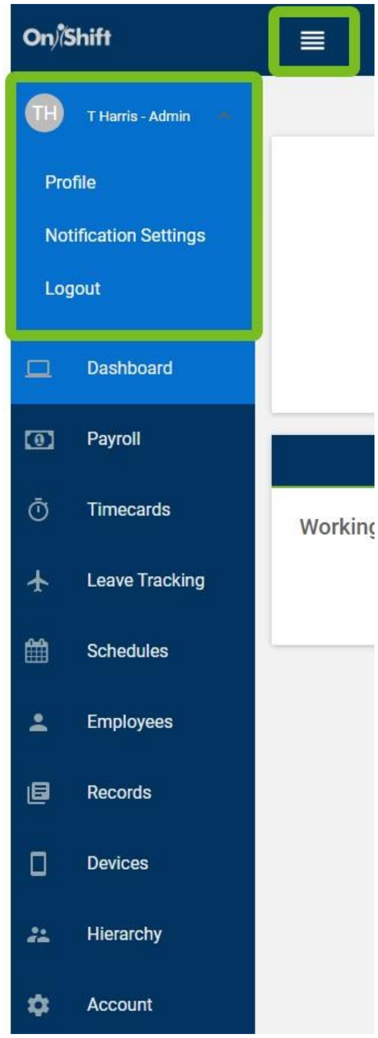
The **navigation menu** appears on the left-hand side of the screen. You can collapse and expand the menu by clicking the three-line **hamburger icon** at the top of the screen.

Use this menu to navigate to different sections of OnShift Time.

The first menu item is your **User Page**. Use the dropdown arrow next to your name to expand or minimize this section.

On the User Page you'll find:

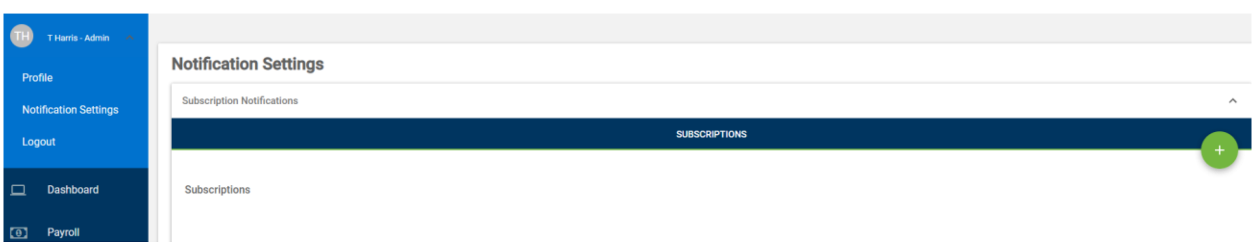
- **Profile** – Access your profile to update your name, email address, and password.
- **Notification Settings** – Set subscription settings.
- **Logout**




**Notification Settings**
To add a notification subscription:

**Step 1:** Under Notification Settings, open **Subscription Notifications**.

**Step 2:** Click the green **"+" icon**. This will open a box titled **Add Subscription**.

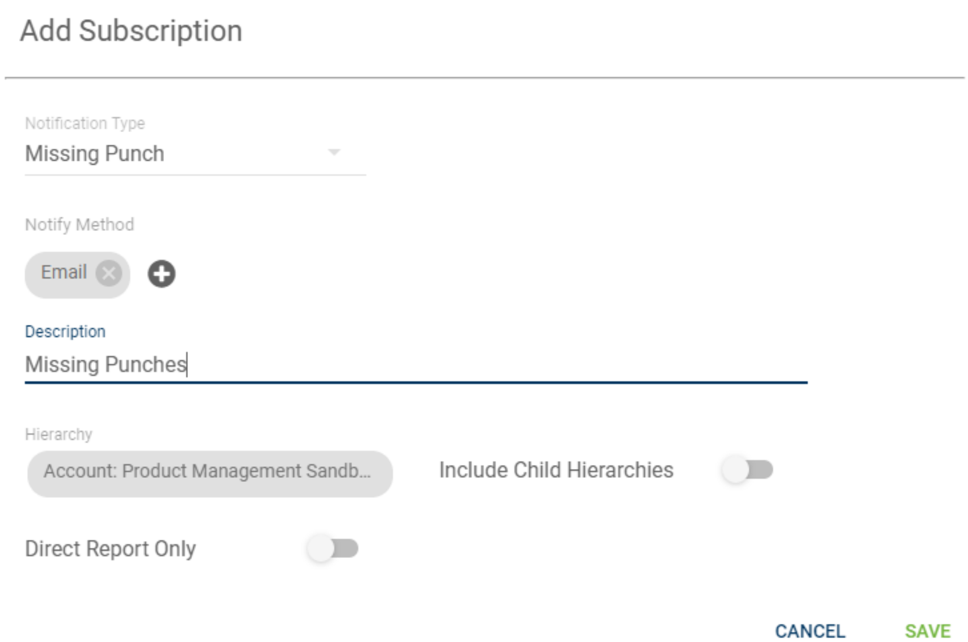



**Step 3:** Select the **Notification Type** you want to receive.

**Step 4:** Choose your **Notify Method**:

- **Email:** receive notification by email.
- **App:** receive notification the next time you sign in. Notifications appear alongside the bell icon on the upper right (next to hierarchies).

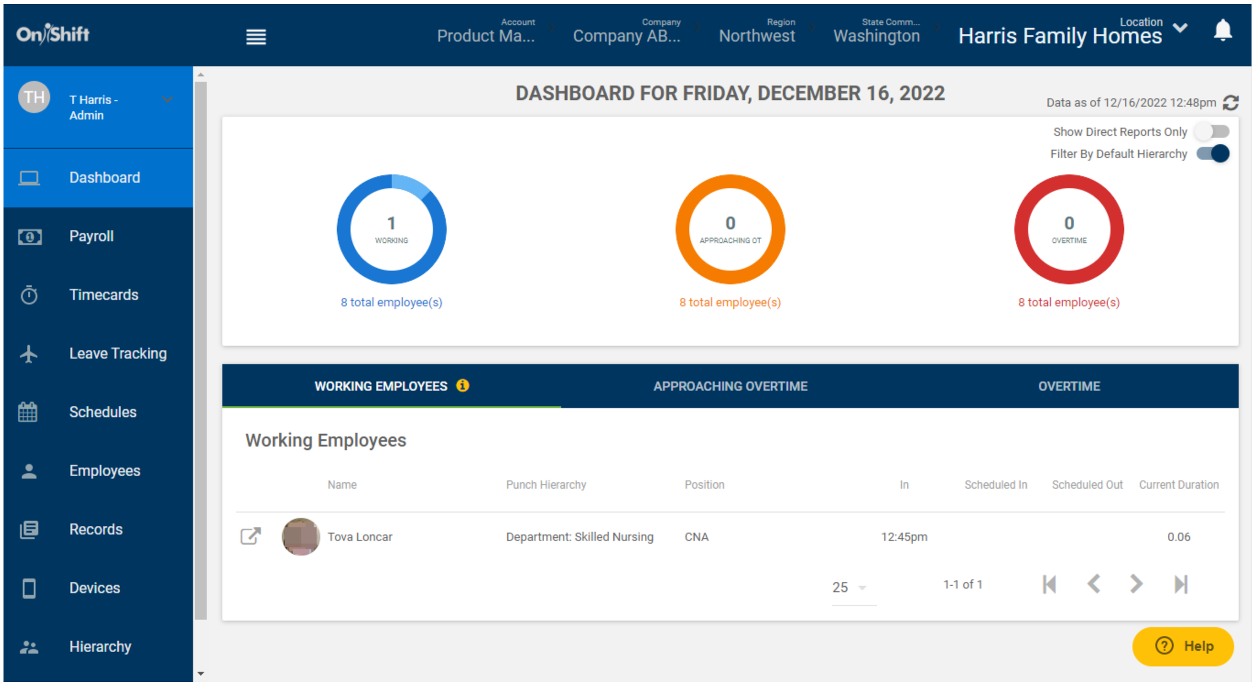

**Step 5:** Enter a **description** for the notification.
**Step 6:** Select the appropriate **hierarchy** and whether to include child hierarchies.
**Step 7:** Select if the notification should be limited to **Direct Reports Only**.




**Step 8:** **Save** your subscription notification and repeat for other notifications needed.

# Dashboard

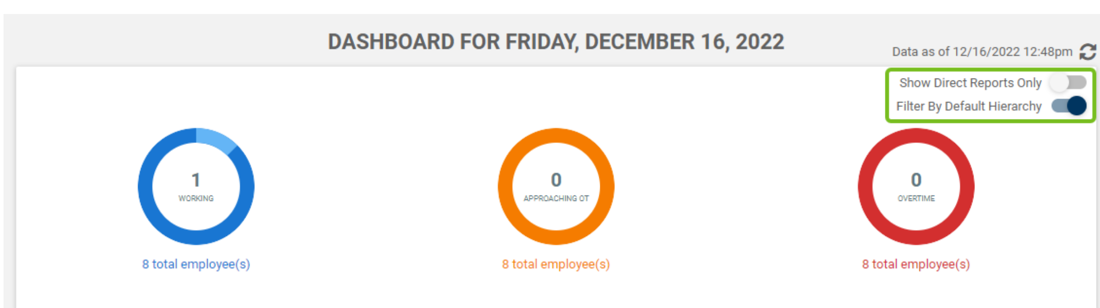
The **dashboard page** is the default home screen for all users.




The three circles in the center of the screen show the total number of employees currently working (blue circle), the number of employees approaching overtime (orange circle), and the number of employees who are in overtime (red circle). Note that the orange circle Approaching Overtime will include employees who are at 32-plus hours.

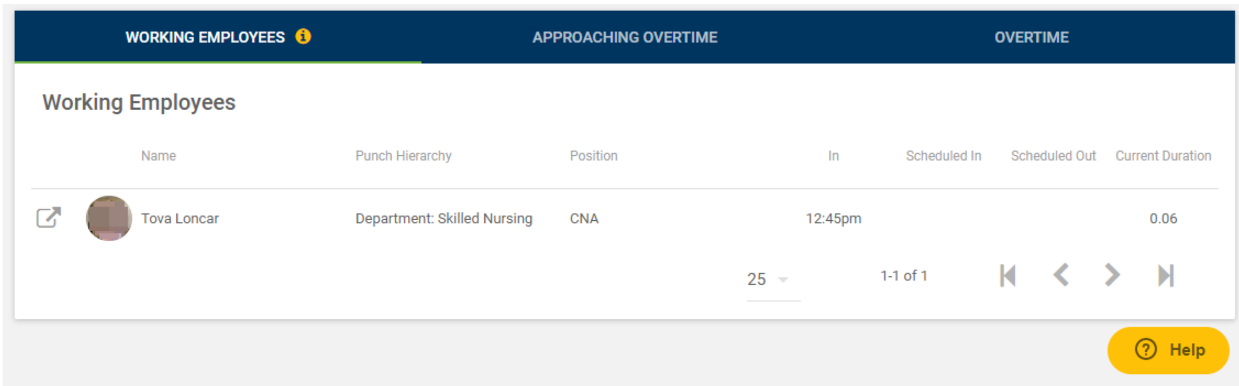
**Filters** found on the upper right of the red circle allow you to **Show Direct Reports Only** (if applicable) and to **Filter by Default Hierarchy**, showing only employees you have access to in your currently selected hierarchy and all hierarchy levels below it.

Text above the filters shows when this data was pulled alongside a **Refresh button** to update.




Scrolling down, you'll see three tabs detailing the employee information from these circles.

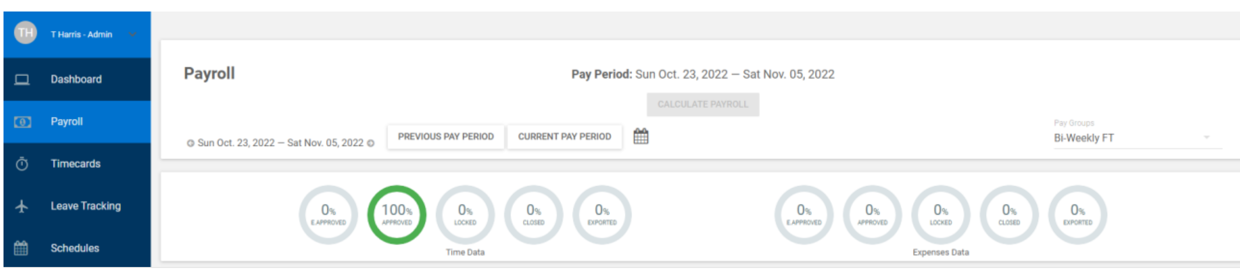
In this example, we see information on the one working employee, inlcuding their name, punch hierarchy position, the position they are currently working, the time they punched in, and their current working duration, shown in a fraction of hours.




A static **Help button** appears on the lower right-hand side of the platform, leading you to **OnShift Time's help center**.

## Payroll

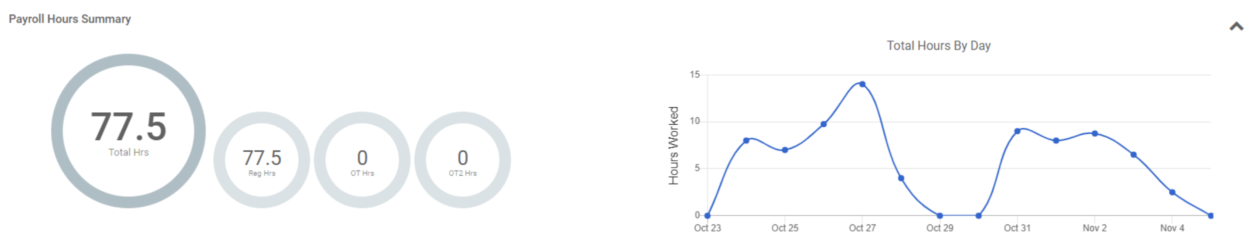
At the Account level of the hierarchy navigation, the **Payroll** section allows you to view the status of your entire payroll preparation for the specified pay period. You can view the following **Time Data** and **Expenses Data** key indicators by percentage: employee approved, supervisor approved, locked, closed, and exported. Changing your hierarchy navigation will narrow down the key indicators to hierarchy-specific items.




**Note:** As best practice, stay up to date with your payroll processing steps and clear any exceptions prior to payroll day to help prevent any unforeseen delays.

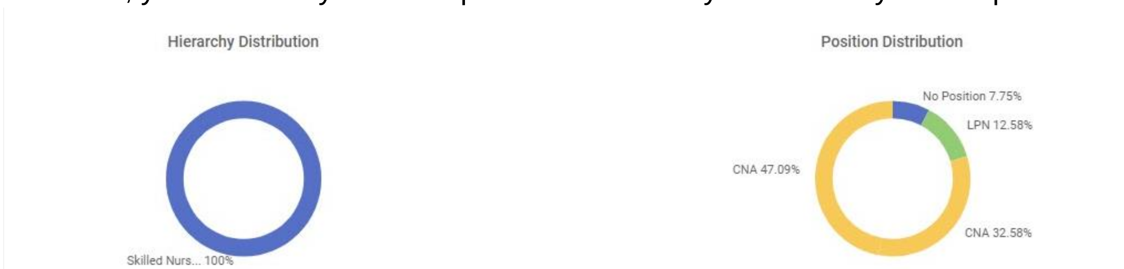
## Payroll Hours Summary

In your payroll preparation, it's important to compare your current pay period with past pay periods. When viewed toward the end of your payroll preparation, you can view any inaccurate data and help confirm the integrity of your payroll preparation.




## Job Costing Summary

In this section, you can view your cost spread across both your hierarchy and its positions.




## Exceptions

You will spend most of your payroll preparation time in this area. Here, you can **filter** types of exceptions to review and modify. You can filter by the following exception types:

- Missing punches
- Punches missing employee approval
- Punches missing supervisor approval
- Biometric low score
- Location boundary
- Quest fail punch
- Unapproved time off request
- Suspense punch

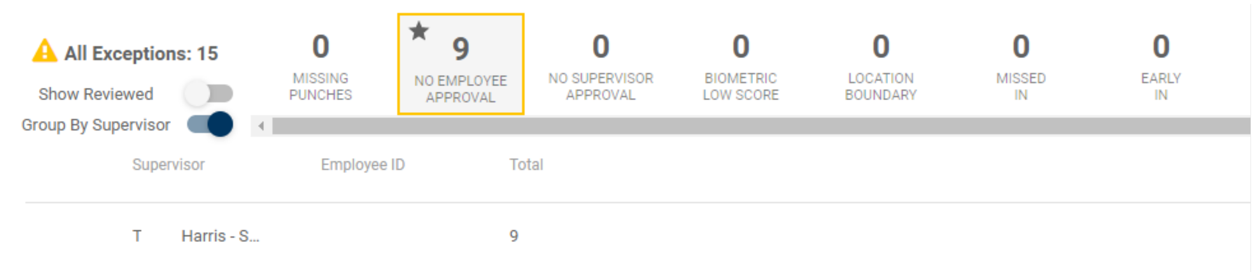
## Preparing for Payroll

Prior to approving payroll, take the time to ensure all details for the pay period are completed in full. This includes making sure all missing punches are entered, ensuring accuracy of timecards, approving or denying all leave tracking, and entering any applicable expenses.

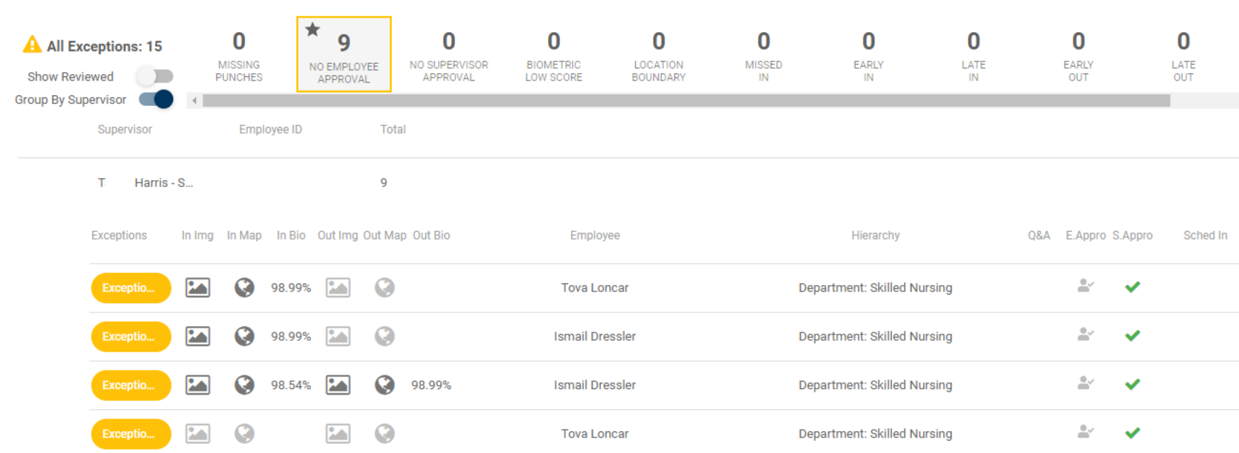
## Reviewing Exceptions and Timecards

**Step 1:** Click an **exception type** to select it. You will see a yellow box appear around your choice. Repeat to select all the exception types you want to review.

**Step 2:** Once you select your exception types you will see the exceptions appear below. You can **Group by Supervisor** (if applicable) to simplify the view.




If you group by supervisor, **click the supervisor's name** to expand the exceptions in their grouping.




**Step 3:** Go to the **Timecards section** to review and resolve the exceptions. After exceptions are resolved on the Timecards screen, they will be removed from this exception list in Payroll upon refreshing.

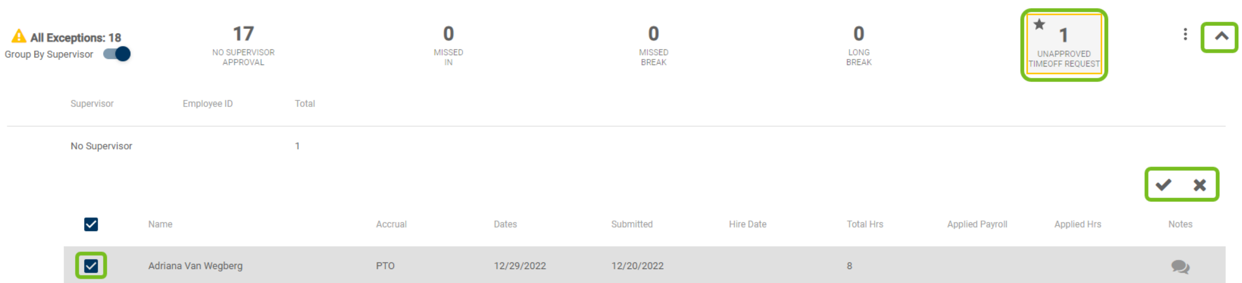
# Unapproved Timeoff Request Exceptions

A common exception in the payroll and timecard approval processes is the **unapproved timeoff request** exception where a timeoff request has been made but no action has been taken to approve or deny the request. Only approved time off gets added to the timecard, so it's important these requests are closed prior to closing payroll.

To approve or deny the request:

**Step 1:** Select the **Unapproved Timeoff Request** exception and click the **menu arrow** to expand to show details.

**Step 2:** Select the **checkbox** to the left of the employee's name, then select the **approval checkmark** or **denial "x" mark**.

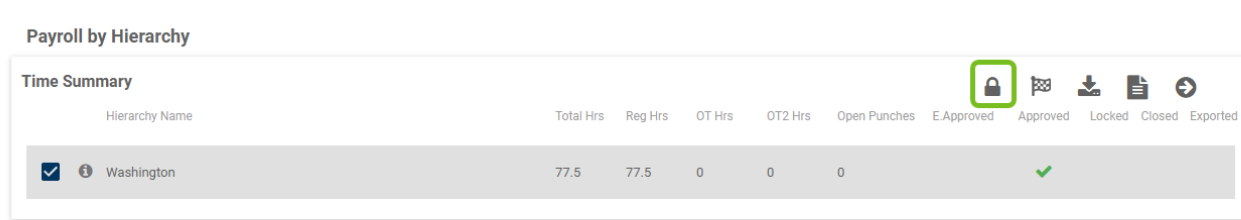



# Locking Down Payroll by Hierarchy

As exceptions and timecards are cleared for payroll, you will want to lock down the completed hierarchies so no further changes can be made. Any punches uploaded to the cloud will be held in a "suspense state" and will <u>not</u> be added to the timecard.

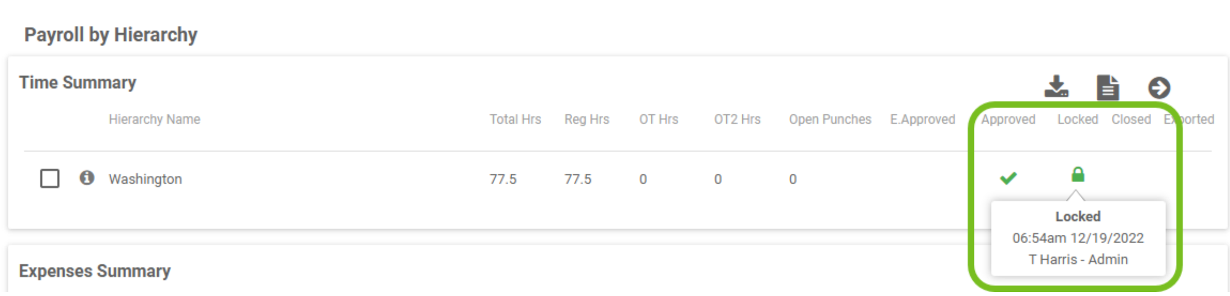
**Step 1:** On the **Payroll** screen, scroll to **Payroll by Hierarchy**, then **Time Summary**.

**Step 2:** To lock down a section of the payroll, click the **checkbox** next to the **hierarchy item** and click the **lock icon** that appears.

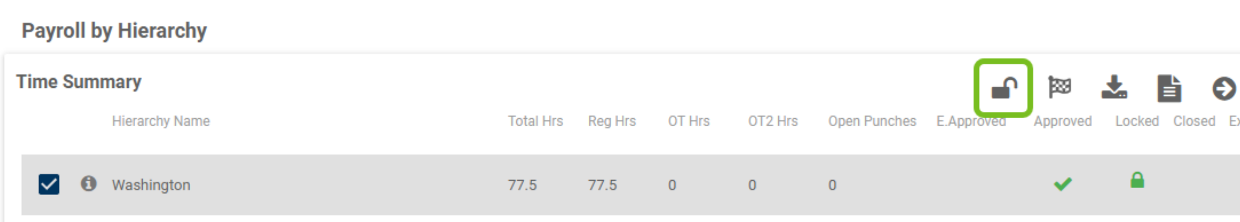



**Note:** You cannot lock a payroll hierarchy if missing punches exist; you will receive an error message.

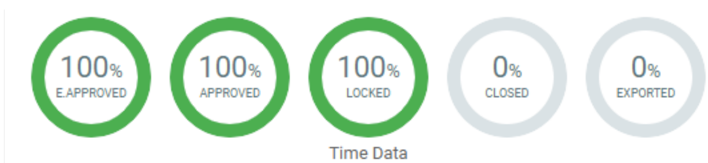
**Step 3: Confirm** the prompt to **lock payroll hierarchy**. You will see a **lock icon** appear under the Locked column, and a **tooltip** will display by the cursor when you hover over it, naming who locked the hierarchy item and when.




You can **unlock** the item by clicking the **checkbox** and clicking the **unlock icon** that appears.




As you lock or unlock hierarchies, the **Time Data chart** at the top of the page will update accordingly. Continue to resolve exceptions hierarchy by hierarchy, locking them as you go, until you are 100 percent locked down.



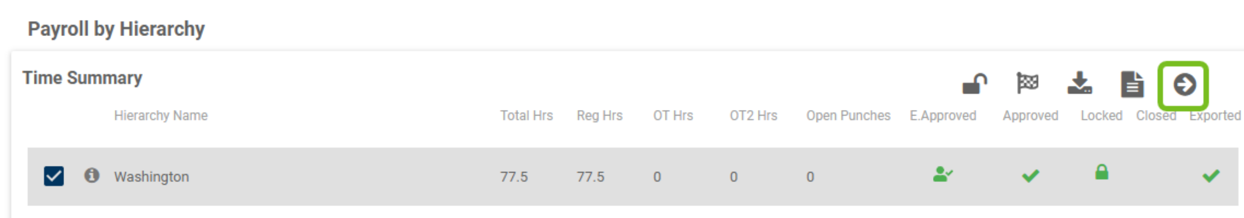

# Exporting Payroll

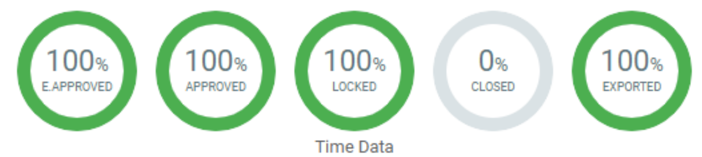
Once you have reviewed and locked down timecards, you can **export payroll**.

**Step 1:** Under **Payroll by Hierarchy, Time Summary** you can export all or sections of your hierarchy by selecting the **checkbox** and clicking the **downward pointing arrow icon** to **Download** the payroll file.

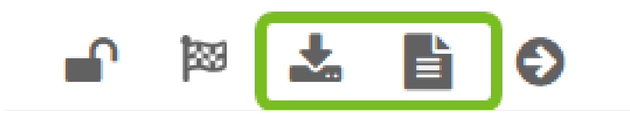
When you click **Export**, you will see confirmation pop-ups. Do not ignore them. They may warn you of missed payroll items that could affect a worker's pay.

**Step 2: Confirm** the pop-up messaging and your payroll will export to a CSV file, which will download to the area specified by your Internet browser settings. A checkmark will appear alongside the hierarchy item in the **Time Summary** and the **Time Data chart** at the top of the page will update to reflect this action.




In addition to exporting payroll, you can also **download payroll** details from the **Payroll Hierarchy, Time Summary** section. Click the **downward pointing arrow icon** to download a payroll file or click the **paper icon** to download a payroll report. Both will download as CSV.

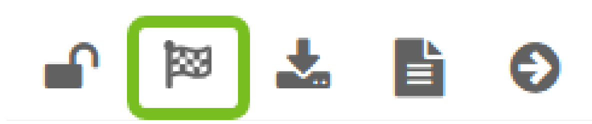


## Closing Payroll

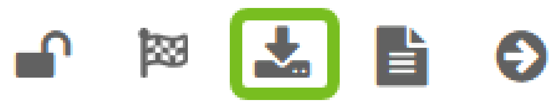
Once you have approved, locked, and exported your payroll, you are ready to close. A few important things to keep in mind prior to closing:

- Any pending, unapproved time off in the pay period being closed will be denied when you close payroll.
- You **cannot** re-open a fully closed pay period.
- You can only close pay periods in the past. You cannot change current or future pay periods.

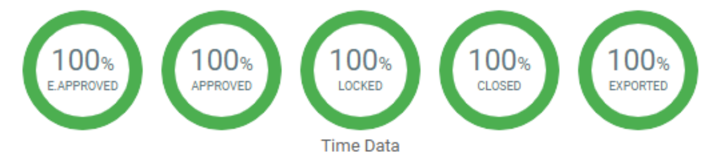
**Step 1:** Under **Payroll by Hierarchy, Time Summary** click the **flag icon**. Closing payroll will trigger accrual calculations for the closed pay period, as well as add all approved time off requests to timecards for this pay period.



**Step 2:** Read the confirmation pop-up that appears, noting that accrual calculations cannot be undone. **Click OK** to confirm and close payroll. You can download the expense file using the downward pointing arrow icon.



Payroll Time is now closed and complete!




# Expenses

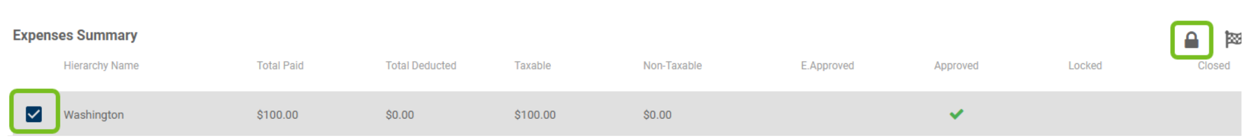
Use the **expenses summary** section to review expenses or additional pay to an employee profile so it can be processed and added to payroll or processed as a separate transaction. All expense management must be made in the employee profile.

Expense details are found under the **Payroll** section, alongside the Time Data. Along with Time Data, **Expenses Data** is displayed in key indicators by percentage at the top of the Payroll screen: employee approved, supervisor approved, locked, closed, and exported. Changing your hierarchy navigation will narrow down the key indicators to hierarchy-specific items.

## *Reviewing, Approving, Locking, and Closing Expenses*

**Step 1:** In the **Payroll** section, scroll to **Payroll by Hierarchy**, then **Expenses Summary**.

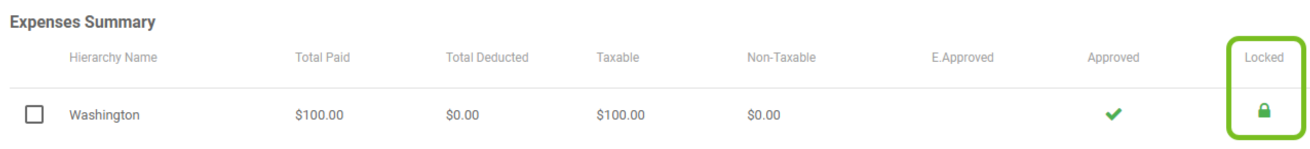
**Step 2:** To lock down, click the **checkbox** next to the **hierarchy item** and click the **lock icon** that appears.



Expenses Summary

| Hierarchy Name | Total Paid | Total Deducted | Taxable | Non-Taxable | E.Approved | Approved | Locked | Closed |
|---|---|---|---|---|---|---|---|---|
| Washington | $100.00 | $0.00 | $100.00 | $0.00 | | ✔ | | |

**Step 3: Confirm** the prompt to **lock payroll hierarchy** for expenses. You will see a **lock icon** appear under the Locked column, and a tooltip will display by the cursor when you hover, showing who locked the hierarchy item and when. You can **unlock** the item by clicking the **checkbox** and clicking the **unlock icon** that appears.



Expenses Summary

| | Hierarchy Name | Total Paid | Total Deducted | Taxable | Non-Taxable | E.Approved | Approved | Locked |
|---|---|---|---|---|---|---|---|---|
| ☐ | Washington | $100.00 | $0.00 | $100.00 | $0.00 | | ✔ | 🔒 |

Like the Time Data chart, the **Expenses Data chart** at the top of the page will update as you lock or unlock hierarchies.

**Step 4 (optional):** You can **export** all or sections of your Expenses Summary hierarchy by selecting the **checkbox** and clicking the **download icon** to **Export Payroll File**. In the prompt that appears, **click OK**.

**Step 5 (optional)**: Download Expenses Summary details by clicking the **downward pointing arrow icon** to download the **payroll expenses file** or click the **paper icon** to download the **expenses report**. Both will download as CSV.

**Step 6:** To close expenses, under the **Expenses Summary** click the **flag icon**.

Payroll Expenses is now closed and complete!

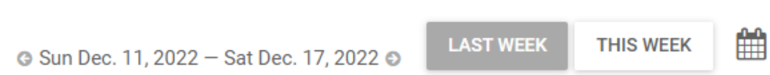
# Timecards

OnShift Time lists all active timecards for a specified period in the **Timecards section**. Supervisors and payroll managers can view and approve timecards, as well as correct missing punches, missing approvals, and other exceptions.

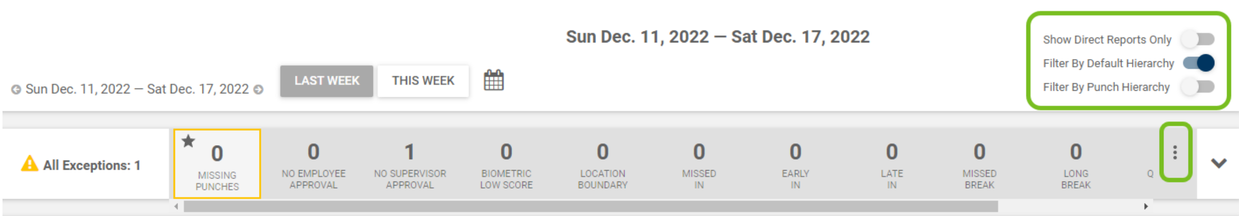
## Viewing Timecard Exceptions

**Step 1:** Make sure you are in your desired hierarchy and navigate to the **Timecards section**.

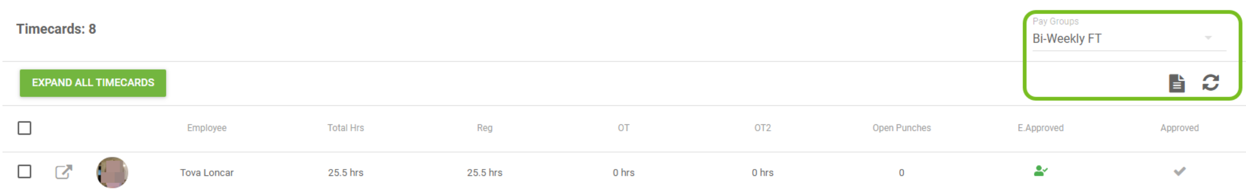
**Step 2:** Set the period to view by using the **date selection** at the top of the page. You can use the arrows, calendar, Last Week button, or This Week button to select.



**Step 3:** Once you select your dates, exceptions will appear below. Use the **three-dot icon** to the right to simplify this view by filtering specific exception types. You can use other **filters** above the dropdown arrow to **Show Direct Reports Only**, **Filter by Default Hierarchy**, and **Filter by Punch Hierarchy**.




**Step 4:** All timecards will appear below the Exceptions filters. To the right, you can filter to specific **Pay Groups**, as well as access **Reports** and **Refresh** data.



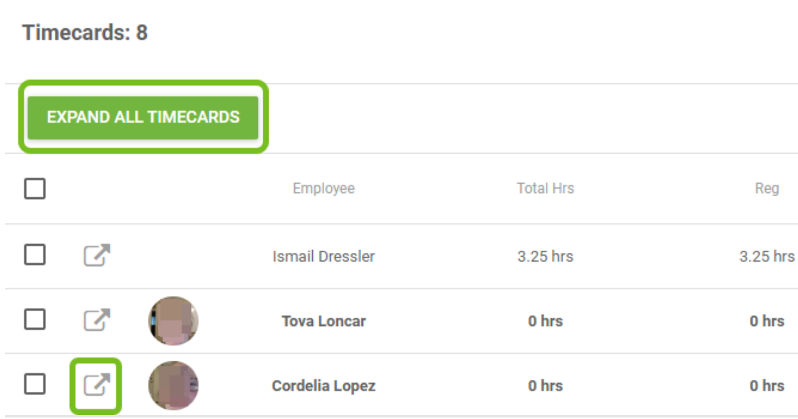

**Step 5:** To make edits, **select the timecard**. In the above example, the timecard is not approved. **Click** on the **checkmark icon** under the Approved column to approve, then **click OK** on the confirmation pop-up.

The timecard will update to show as **Approved**. Refresh the page, and the exception will no longer appear.

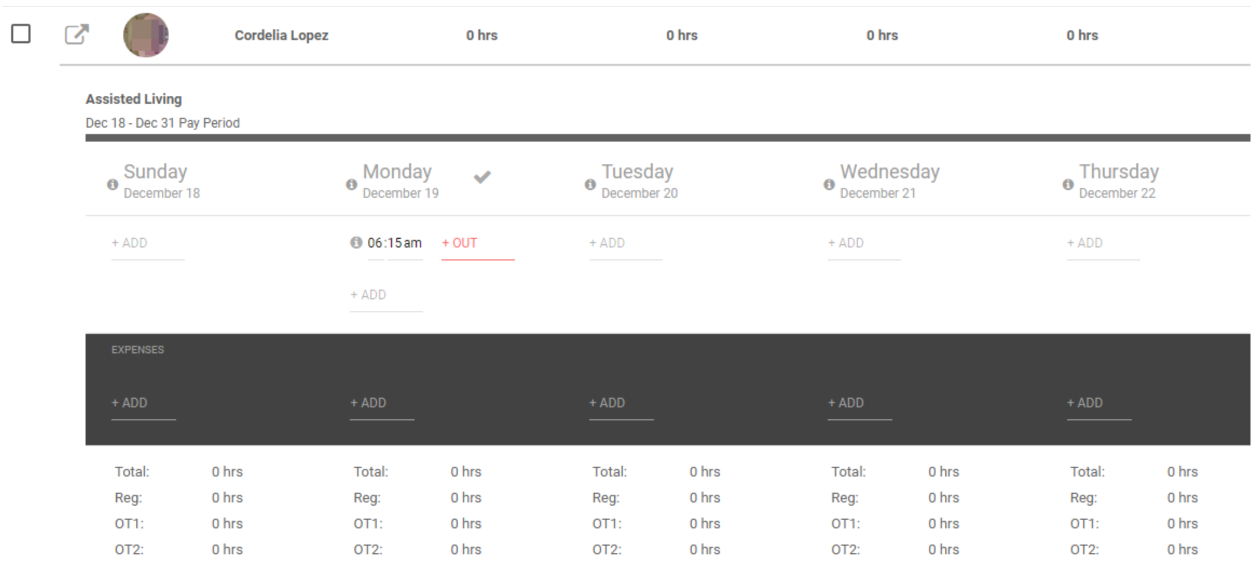
# Viewing and Editing Timecards

## *Viewing Timecards*

You can expand all timecards in your filtered group or individually by clicking on the **Expand All Timecards** button or **clicking the name** of the individual you want to review. You can pop out the information in a separate browser tab by clicking on the **pop-out arrow icon**.

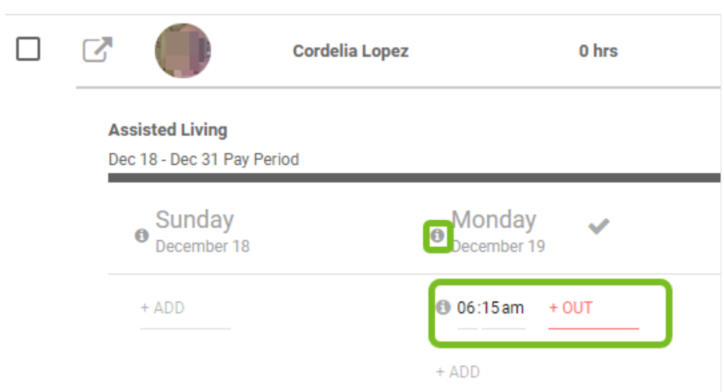


When you open an individual timecard, you can review and edit details for each day. **Manually entered punches** will appear in **red**. **Missing punch items** will also appear in red and state **+OUT** regardless of what information is missing. You can add either an In or Out punch, and the system will re-pair in chronological order (see Punch Pairing Behavior).

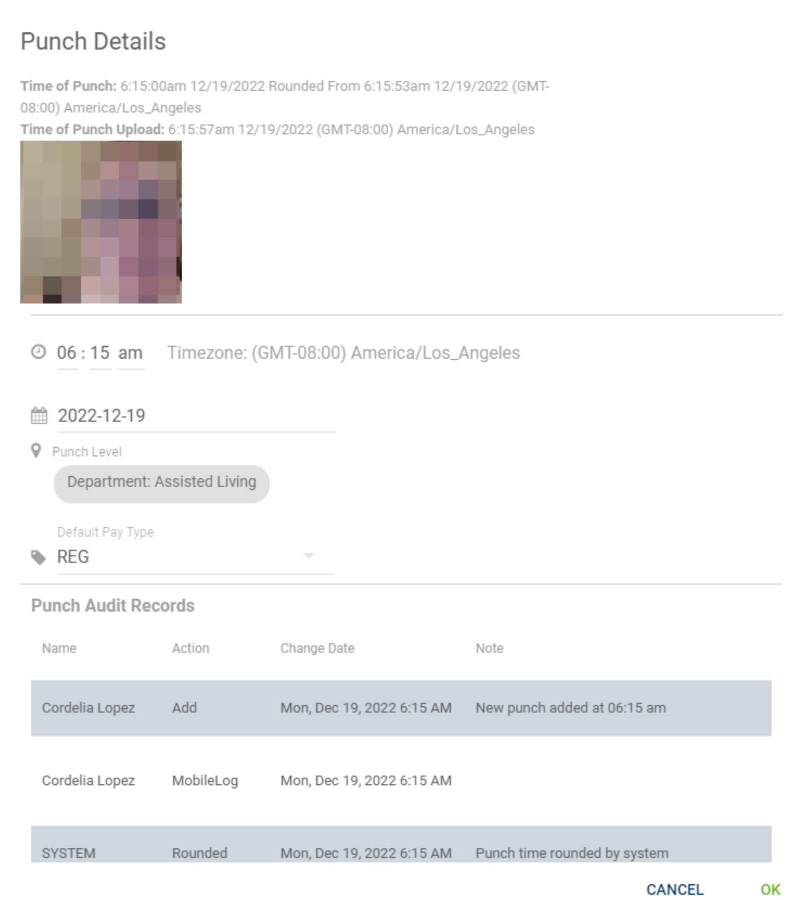



Hovering over the **"I" icon** next to a punch will show a tooltip with either (1) the actual punch time, if punch rounding is turned on and rounded times show on the timecard, or (2) the rounded time of the punch if rounding is turned off and actual times show on the timecard.

Here is a closer view of this worker's Monday shift. We can see they clocked in but did not clock out. Clicking on the **"I" icon** next to the 6:15 am in punch will show more **Punch Details**.

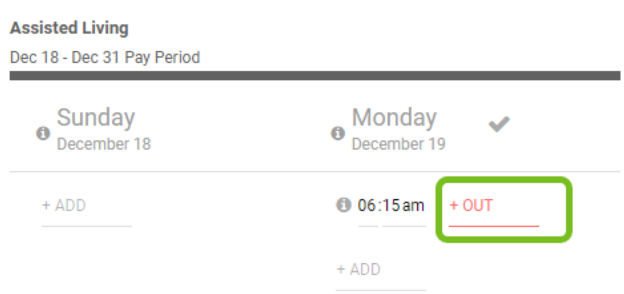


The employee **Punch Details** show the time of the punch and any time rounding applied, as determined by your organization. The **Time of Punch Upload** reflects when the punch was loaded to OnShift Time's system from the cloud. Additional details include the punch level (where the employee punched), pay type, and punch audit records.

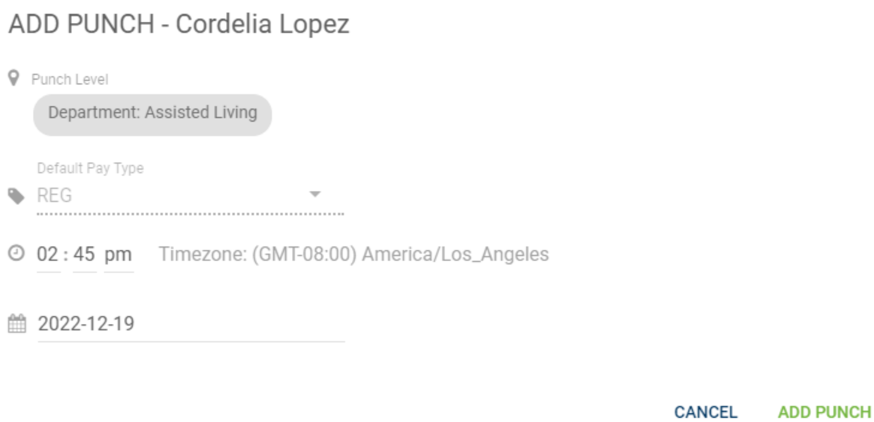



## *Editing Timecards – Adding a Missing Punch*

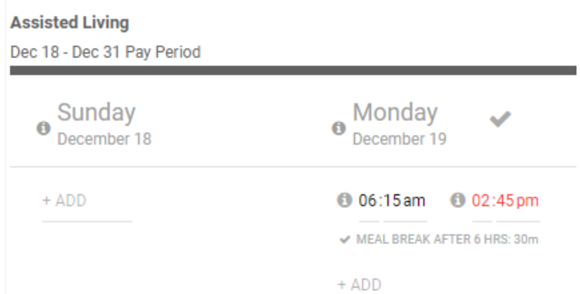
**Step 1:** From the **employee timecard** view, **select the punch** you would like to add or edit. Here, we're going to add a **missing out punch** by clicking on **+OUT**.



**Step 2:** On the pop-up that appears, **enter the missing information**. This worker should have clocked out at 2:45 pm. Then click **Add Punch** to complete.



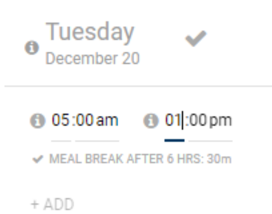

Any **information manually added or edited** by a supervisor or administrator will appear in **red**. As changes are made to the timecard, a **log of edits** will be recorded and visible alongside the punch details, by clicking the **"I" icon**. The edit log includes the date and time of the edit, what was edited, and who edited it.

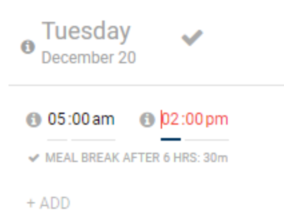



You can also **add a punch** to a timecard by clicking the **+ADD icon** under the date.

## *Editing Timecards – Editing a Punch*

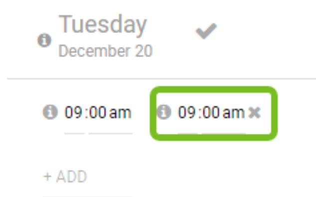
To correct or **edit an existing punch**, click on the punch that needs edited and make the change by typing in the new time. When you click away from the punch field, the platform will automatically save the correction and display the new time in red.



## *Editing Timecards – Deleting a Punch*

**Step 1:** To **delete a punch**, such as a duplicate punch, hover by the punch on the employee's timecard. An "**X" icon** will appear. **Click the X icon**.



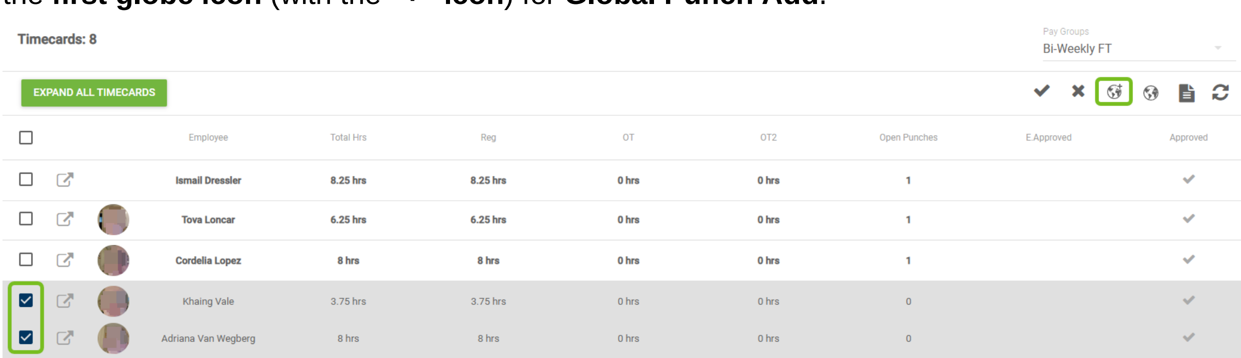

**Step 2:** On the pop-up **confirm** the punch should be deleted and it will be removed.

## *Mass Adding or Editing Timecards*

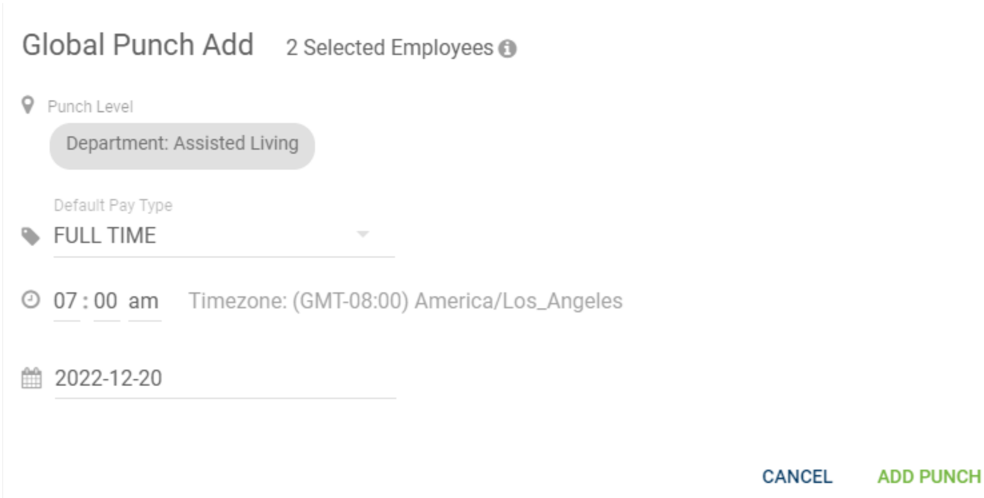
While you can edit timecards individually, sometimes you may need to edit multiple timecards at once. The **Global Punch Add** and **Global Punch Edit** options let you mass-add or mass-edit punches for selected employee timecards, even if the punch times are different. These options are found under the **globe icons** in the Timecards section.


### Global (Mass) Punch Add

**Step 1: Select** the timecards you wish to add time to by clicking the **checkboxes**. Then, click the **first globe icon** (with the **"+" icon**) for **Global Punch Add**.



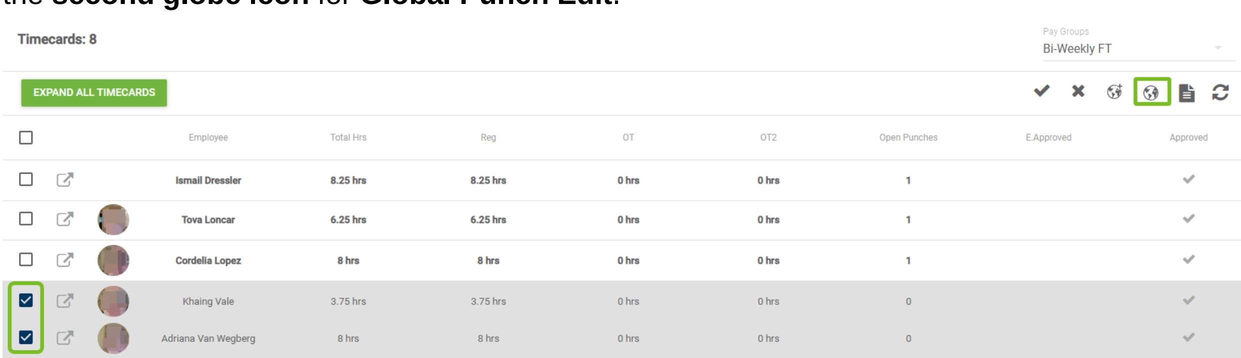
**Step 2:** On the pop-up, enter the detail for the punch time add, then click **Add Punch**.




**Step 3: Confirm** your action on the next pop-up by clicking **OK** and you will receive a confirmation on screen.

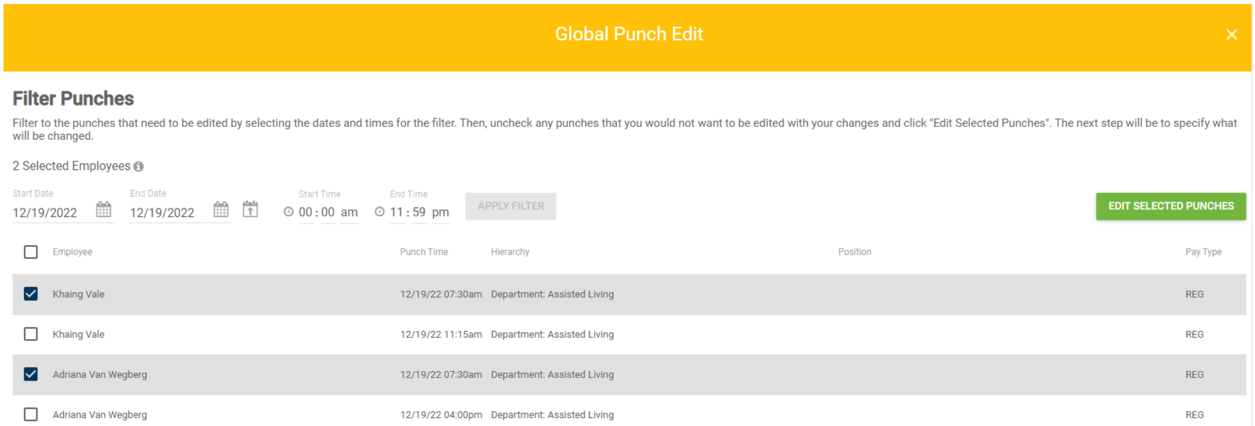
**Global (Mass) Punch Edit**

**Step 1: Select** the timecards you wish to add time to by clicking the **checkboxes**. Then, click the **second globe icon** for **Global Punch Edit**.



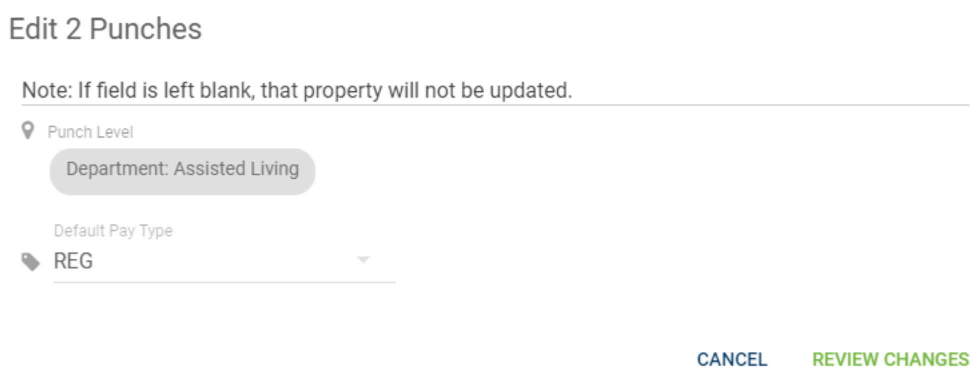

**Step 2:** After clicking the Global Punch Edit icon, you will be directed to a screen prompting you to **Filter Punches**. Select a **date range** for the punches to review and click **Apply Filter**.

**Step 3:** Use the **checkboxes** to select the specific punches you want to edit.

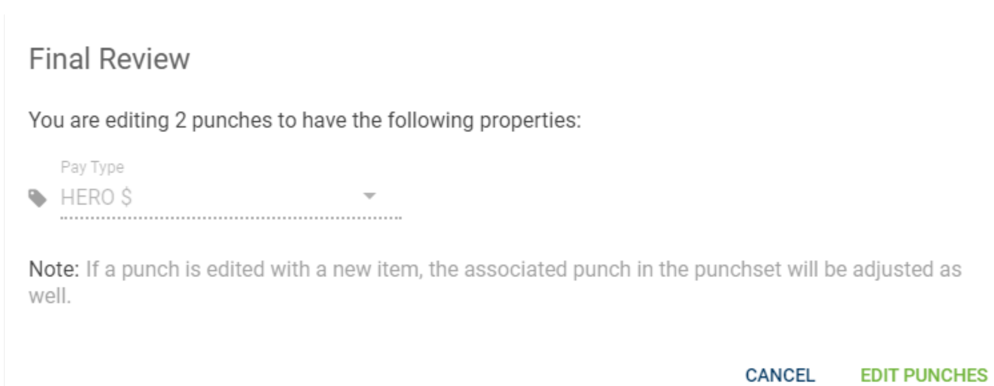



**Step 4:** Click **Edit Selected Punches**.

**Step 5:** On the pop-up, make the necessary changes and click **Review Changes**.



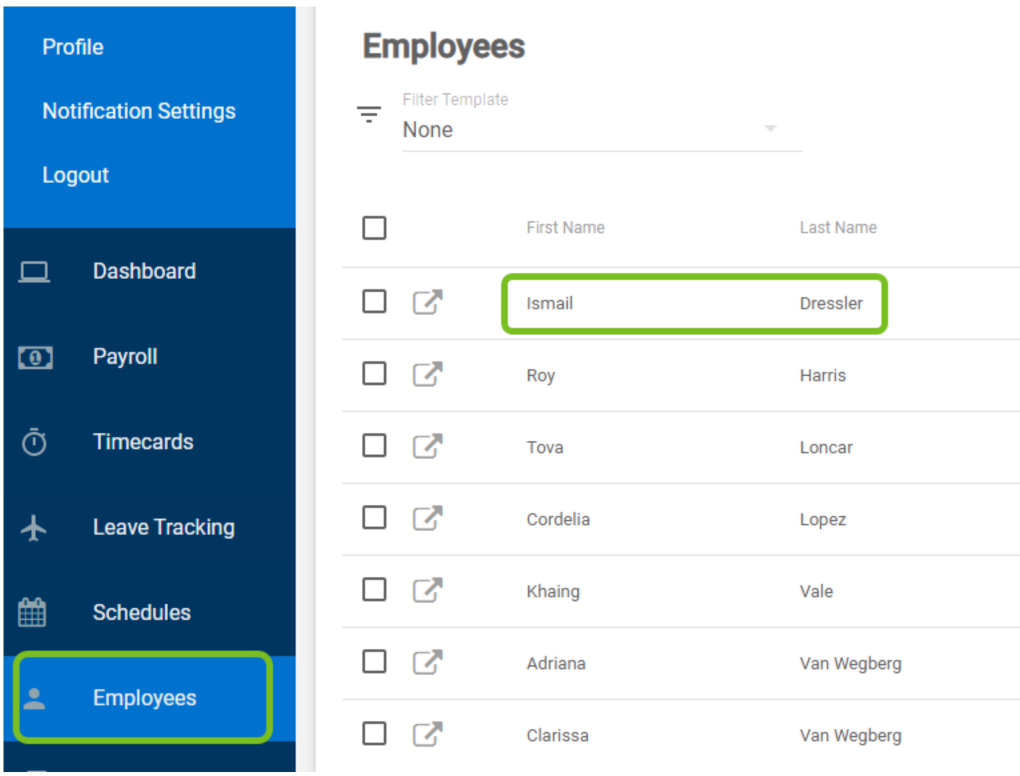

**Step 6:** A **Final Review pop-up** box will appear, giving you one more opportunity to review your changes. Click **Edit Punches** to save the changes. Confirmation will appear on screen.



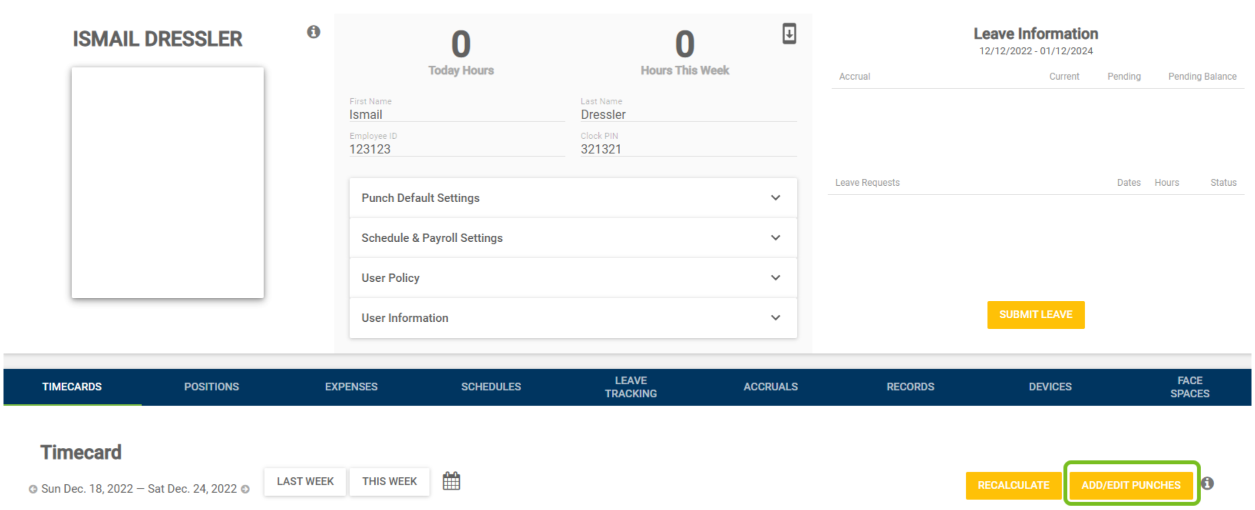
## *Mass Editing Timecards for a Single Employee*

An employee's punches can also be added and edited in bulk from their profile in the **Employees section** of OnShift Time.

**Step 1:** Navigate to the **Employees section** on the left-hand menu and click on the **name** of the employee you want to edit.

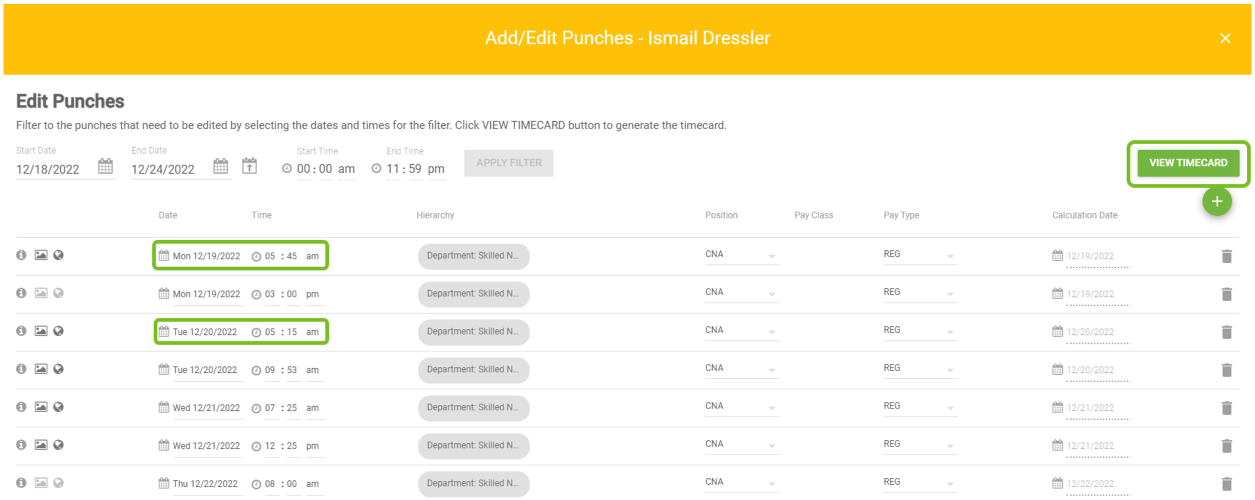



**Step 2:** On the employee profile, click the yellow **Add/Edit Punches** button.



**Step 3:** A new screen will appear, letting you select and edit multiple dates on the employee's timecard from one view. A filter at top lets you select a specific date range and time, if needed.

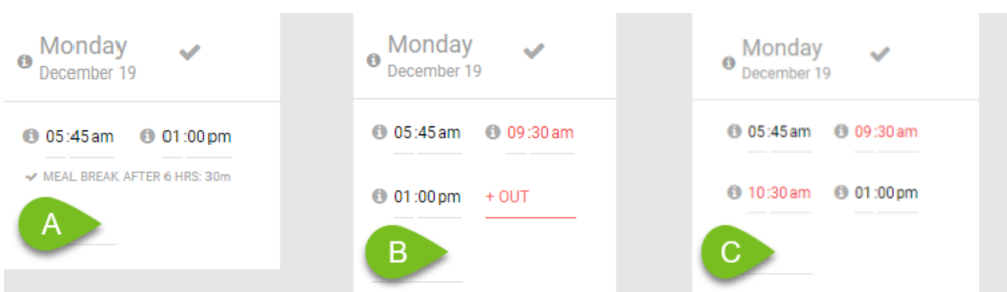
**Step 4:** After making your edits, click **View Timecard** to process and save your changes. You will be directed back to the employee profile screen.




## *Punch Pairing Behavior*

While editing timecards, note the **punch pairing behavior**. OnShift Time will pair punches sequentially, as a best effort to avoid any missing punches.

This worker punched in at 5:45 am, and out at 1:00 pm. They forgot to punch out for an extended break from 9:30 am to 10:30 am, so you need to add it for them. As you add the punches (images B and C), the timecard updates to order and pair them sequentially.




Punches will only pair if they are the same position and the same punched location. For example, a LPN in Nursing punch in will not pair with a LPN in Dietary punch out.

### *Viewing a Worker's Weekly Total Hours Worked*

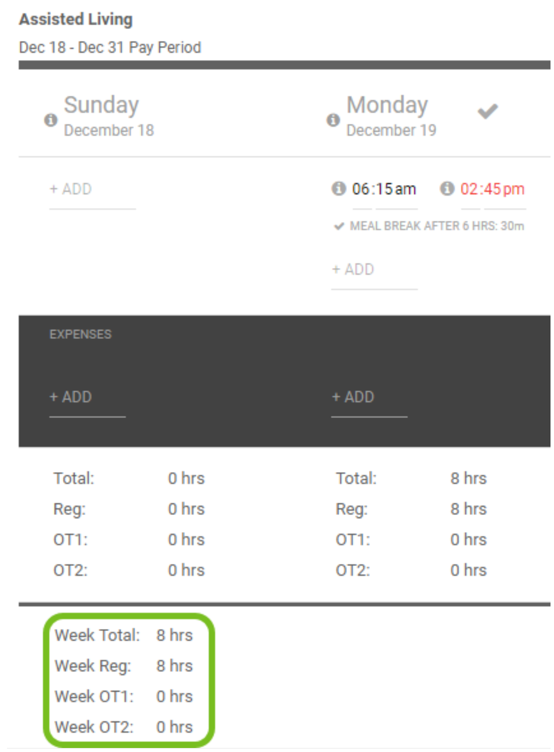
If you look at a worker's timecard below the punch details, you can see a timecard tabulation with details of the number of hours worked by that individual week-to-date. The system automatically sums the hours as the worker punches in and out.

**Week Total** = Total of *all* weekly hours, including Week Reg hours, OT1, and OT2.

**Week Reg** = Regular worked hours daily. Any daily worked hours that count toward overtime display on the timecard as Reg hours.

**OT1** = Refers to regular overtime hours, worked at a maximum of 40 hours weekly.

**OT2 =** Refers to double time hours, based on your organization's overtime rules. Can also be used for California overtime rules.




## Approving Timecards

There are three ways to approve timecards—all timecards at once, worker by worker, or day by day per worker. You can use multiple approval options simultaneously, and they are reflexive to one another's actions. For example, if you approve all timecards at once but need to unapprove a particular worker's timecards for edits, you can do so.

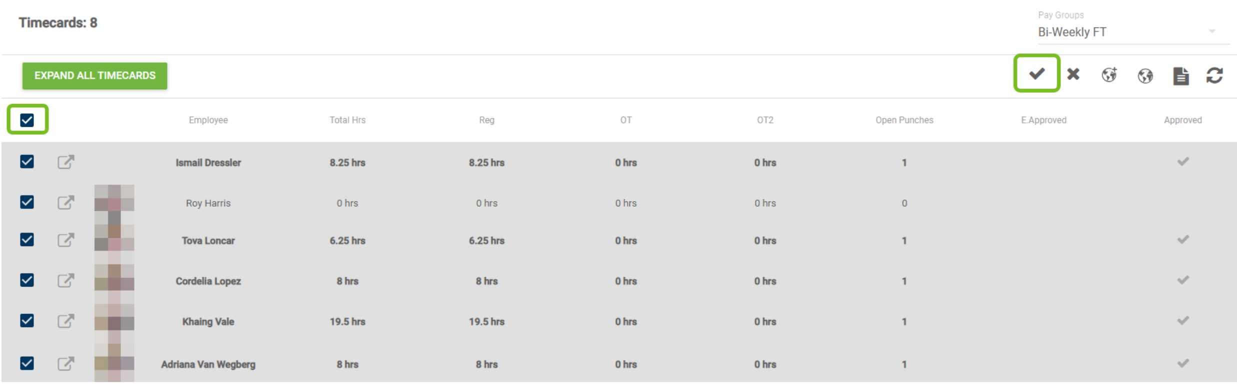
### *Approving All or Multiple Timecards at Once*

If all timecards are correct, you can approve them in bulk. You can also choose among timecards to approve in bulk.

**Step 1:** Select the **checkbox** on the far left under the **Expand All Timecards** box. This will select all timecards. (If you are selecting specific timecards for bulk approval, you can do so using these checkboxes.)

**Step 2:** Select the **checkmark icon** that appears on the upper right of the Timecards area to **Approve**.

**Step 3: Confirm** in the pop-up that you want to approve by clicking **OK**. You will receive a confirmation pop-up at the bottom of the page.

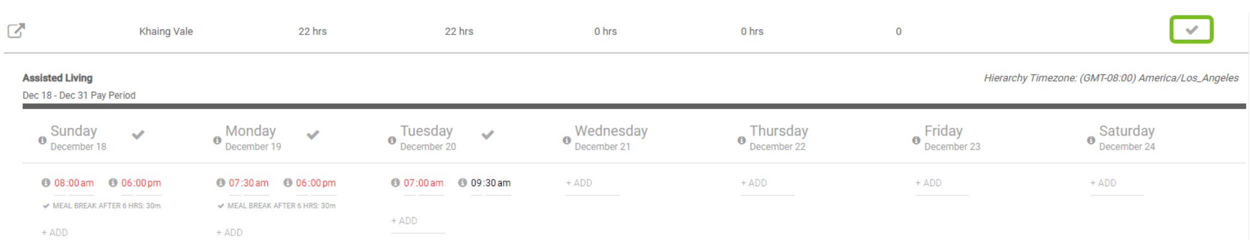



## Approving Timecards Worker by Worker (by Week)

Approving timecards one worker at a time lets you closely review each worker's punch sets.

**Step 1:** Click to expand the worker **timecard** you want to review.

**Step 2: Review** the timecard, **make edits** where needed, and **approve** by clicking the **checkmark icon** on the upper-right of the timecard. The checkmark will turn green, and you will receive a confirmation pop-up at the bottom of the page.

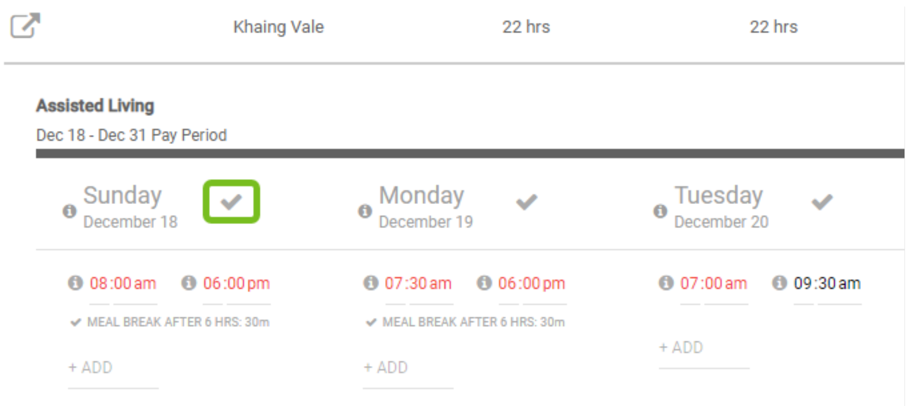



## Approving Timecards Day by Day (by Worker)

You can also review and approve worker timecards day by day, opening and reviewing timecards one at a time, and approving each worker every day as the week progresses.

**Step 1:** Expand the worker timecard you want to review by clicking it.

**Step 2: Review** the timecard, **make edits** where needed, and **approve** by clicking the **checkmark icon** to the right of the day of the week on the timecard. The checkmark will turn green, and you will receive a confirmation pop-up at the bottom of the page.




## *Unapproving Timecards*

**Step 1:** To unapprove a worker's timecard for a particular day or week, simply **unselect the green checkmark** icon next to the timecard you want to unapprove.

**Step 2: Confirm** your action on the pop-up by clicking **OK**. The checkmark will turn gray, and you will receive a confirmation pop-up at the bottom of the page.

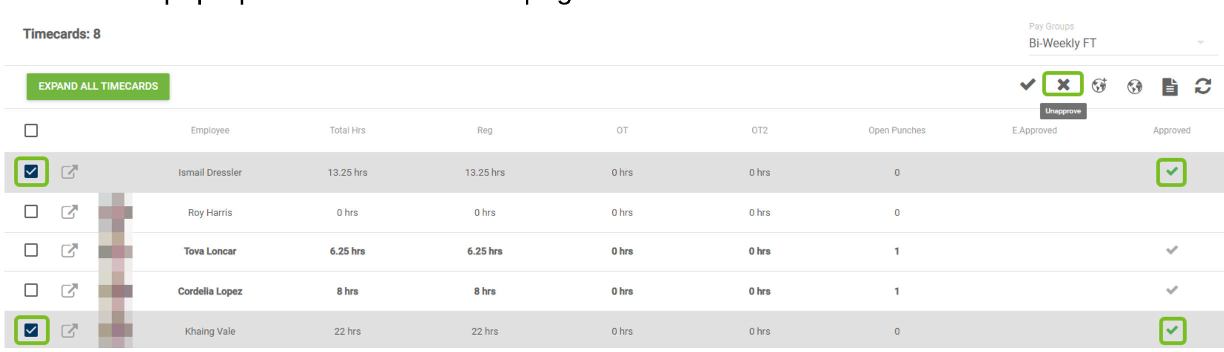
## *Unapproving Multiple Timecards at Once*

You can also unapprove multiple timecards at once.

**Step 1: Select** the **checkbox** on the far left under the **Expand All Timecards** box. This will select all timecards. (If you are selecting for bulk unapproval, select among timecards using these checkboxes.)

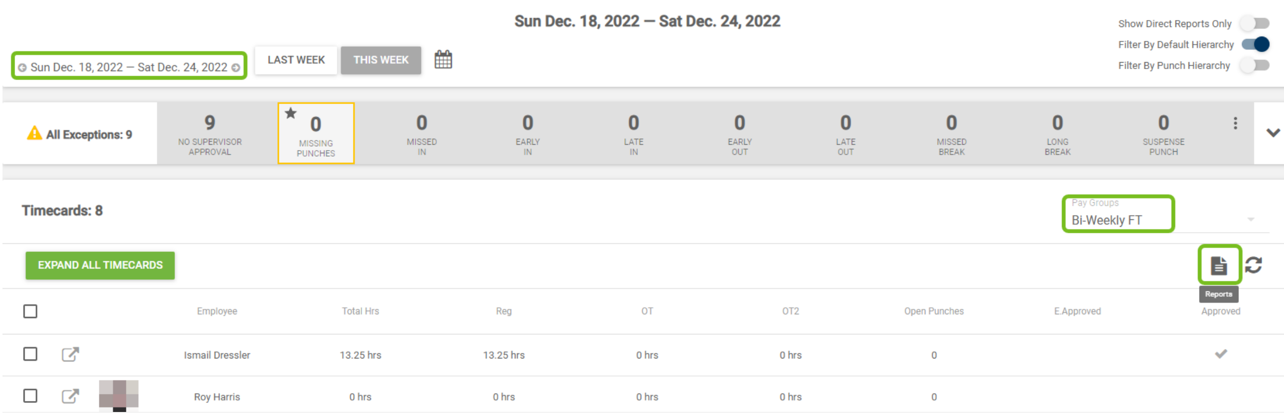
**Step 2:** Select the **"X" icon** on the upper right of the Timecards area to **unapprove**.

**Step 3: Confirm** in the pop-up that you want to unapprove by clicking **OK**. You will receive a confirmation pop-up at the bottom of the page.



## Timecard Reports

You can run timecard reports from the **Timecards** menu.
**Step 1:** Navigate to the **Timecards** menu.
**Step 2:** Select the **period** and **pay group** you wish to view.
**Step 3:** Click on the **Reports icon**.




**Step 4: Select** the Report you want to run:

- **Punch Detail Report** – Shows punch details including hierarchy, position, date, punches, and hours.
- **Timecard Summary Report** – Shows hours/day for each employee in a date range.
- **Timecard Audit Report** – Shows changes made to employee timecards. This can be useful to check for time fraud.
- **Estimated Time Report** – Shows current time as-of running the report to see approaching overtime.
- **In/Out Report** – Shows who is currently punched in and when they recently punched out.
- **Pay Period Report** – Shows information for the full pay period selected.

**Step 5:** Click **Download**.

# Leave Tracking

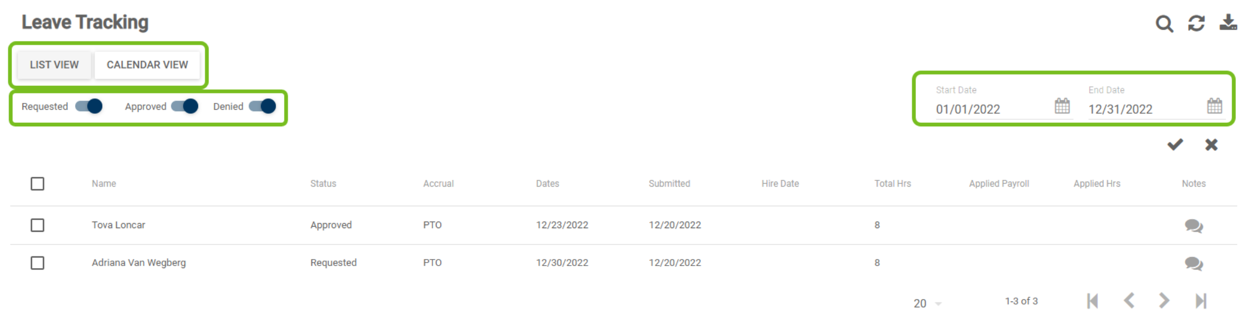
OnShift Time allows workers, their supervisors, and administrators to submit leave requests. Supervisors and admins can view requests directly in OnShift Time for approval or denial.

## Viewing and Approving Leave Requests

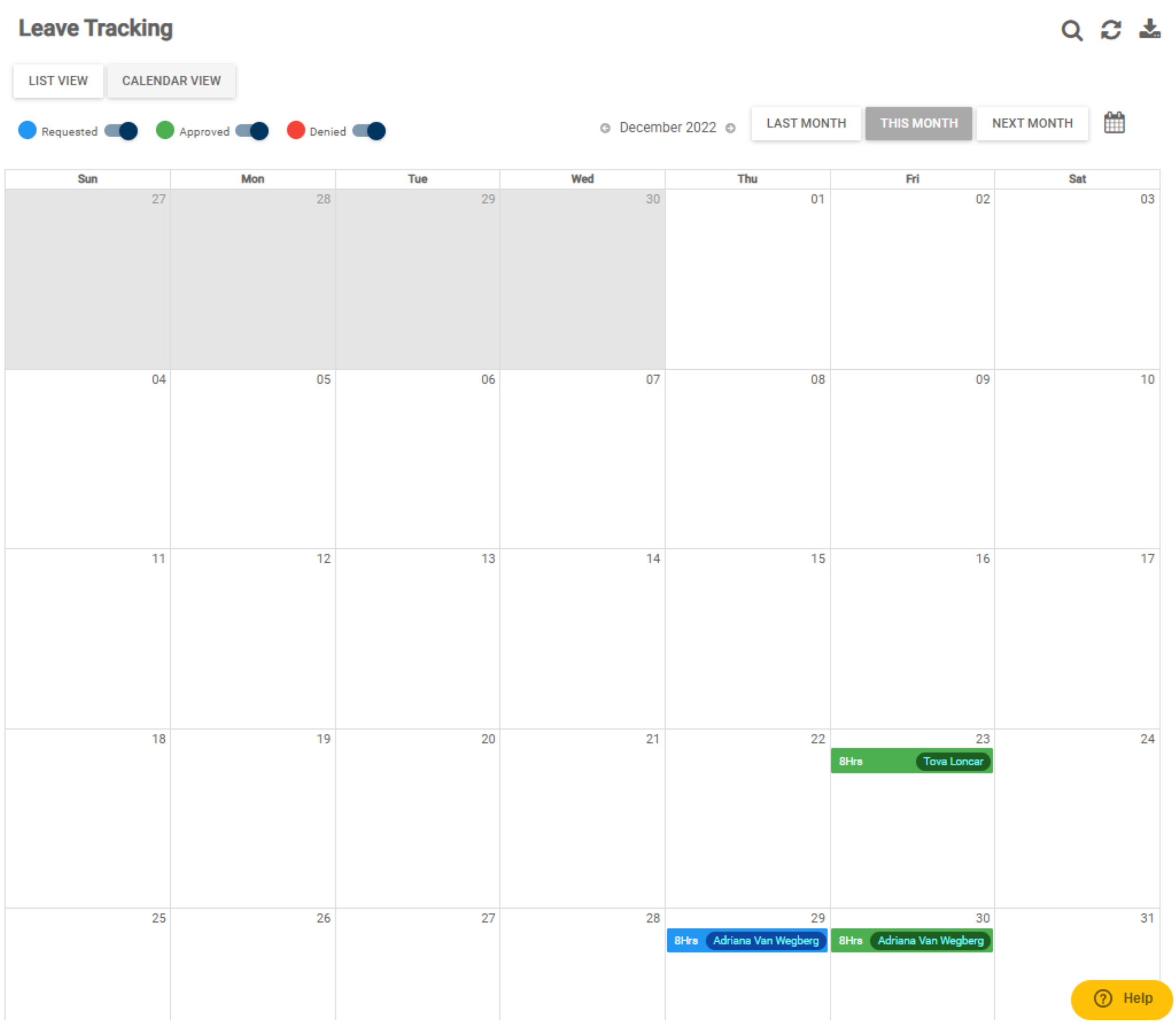
**Step 1:** Navigate to the **Leave Requests** section.

**Step 2:** Select **List View** or **Calendar View** to review requests. Apply **filters** to view **Requested**, **Approved**, and/or **Denied** requests. You can also view requests submitted for a specified **date range**.

*List view:*

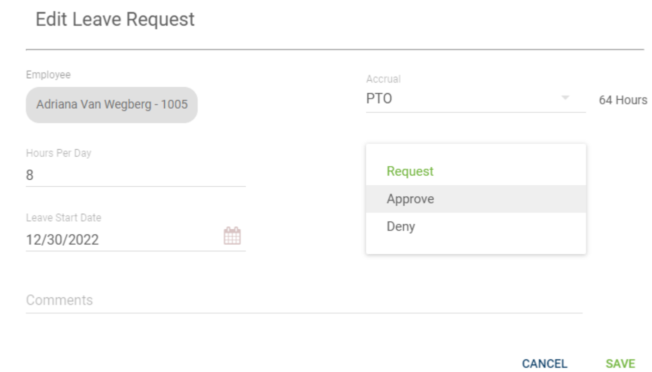



*Calendar view:*



**Step 3: Select a request** to view details and to approve or deny the request.

**Step 4:** On the pop-up, use the **Status dropdown** menu to select the desired action for the request, then select **Save**. The status will change on the Leave Tracking screen.




# Entering a Leave Request

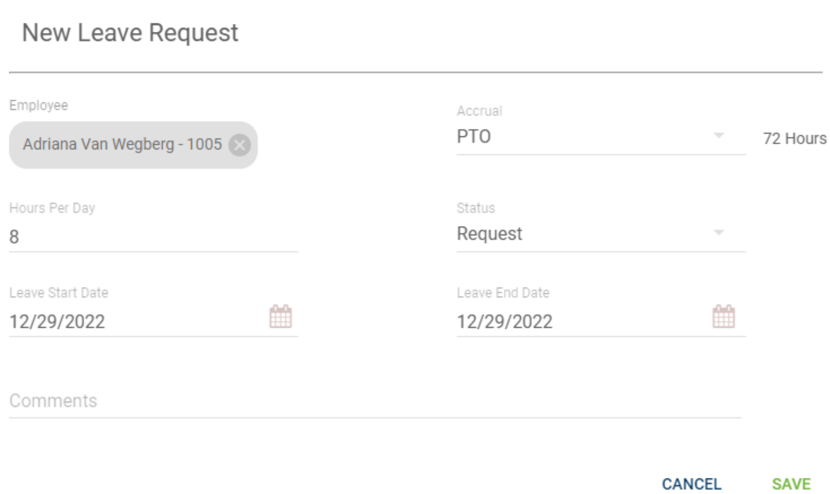
**Step 1:** To **enter a leave request** for a worker, navigate to the upper right-hand corner and click the **"+" icon**.

**Step 2:** On the **pop-up**, use the gray **"+" icon** to choose an employee or search the employee by name, then **click OK**.

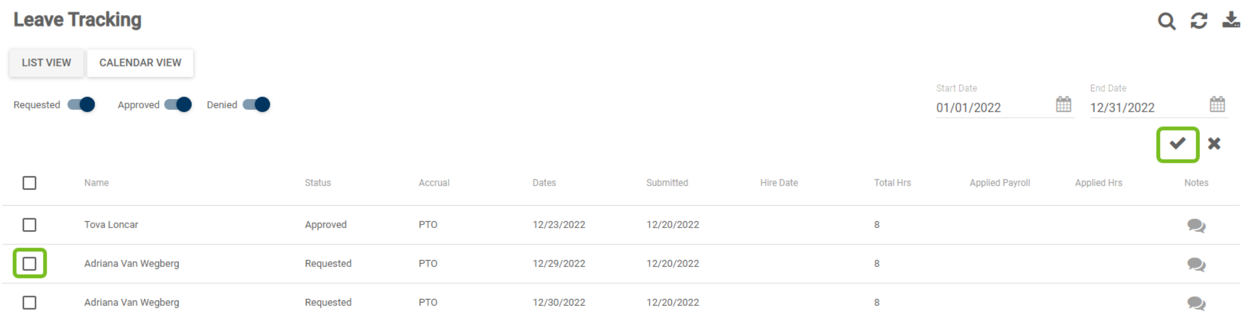
**Step 3:** Fill out the **remaining information** for the request, including:

- Accrual Type used for the request (accrued hours will appear next to accrual)
- Hours per day
- Leave dates
- Comments (optional)

**Step 4:** Click **Save** to enter the request.



**Step 5:** If you are approving the request, you can **update the Status field** on Step 3 to read Approved. Or **select the request** on the main leave tracking view and click the **checkmark** at the upper-right of the list of requests.

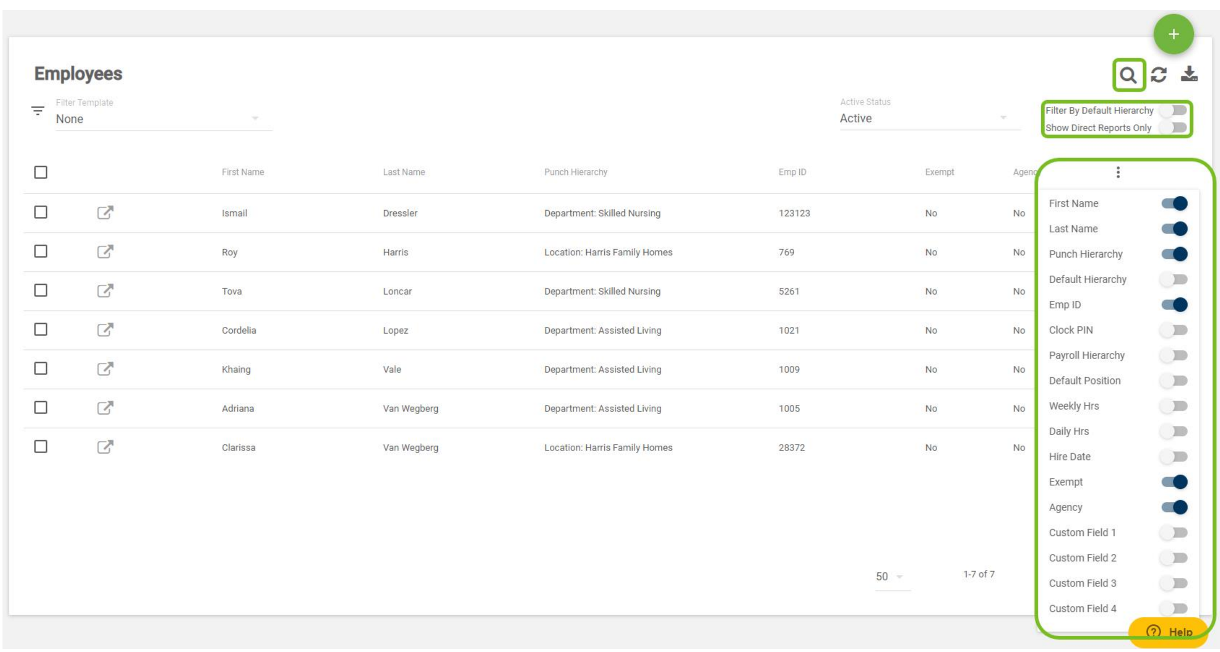



# Employees

You can add and edit **employee profiles** manually in OnShift Time.

## Searching for Employees

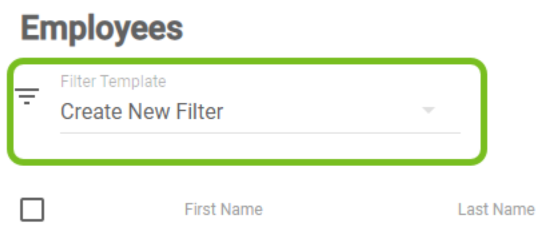
From the Employees section, you can search for an individual by clicking the **magnifying glass icon** on the upper right. You can also set pre-defined filters to **Filter by Default Hierarchy** or **Show Direct Reports Only**. You can also **view by Active Status** or **create a custom filter** of your own design using the **Filter Template** creator.



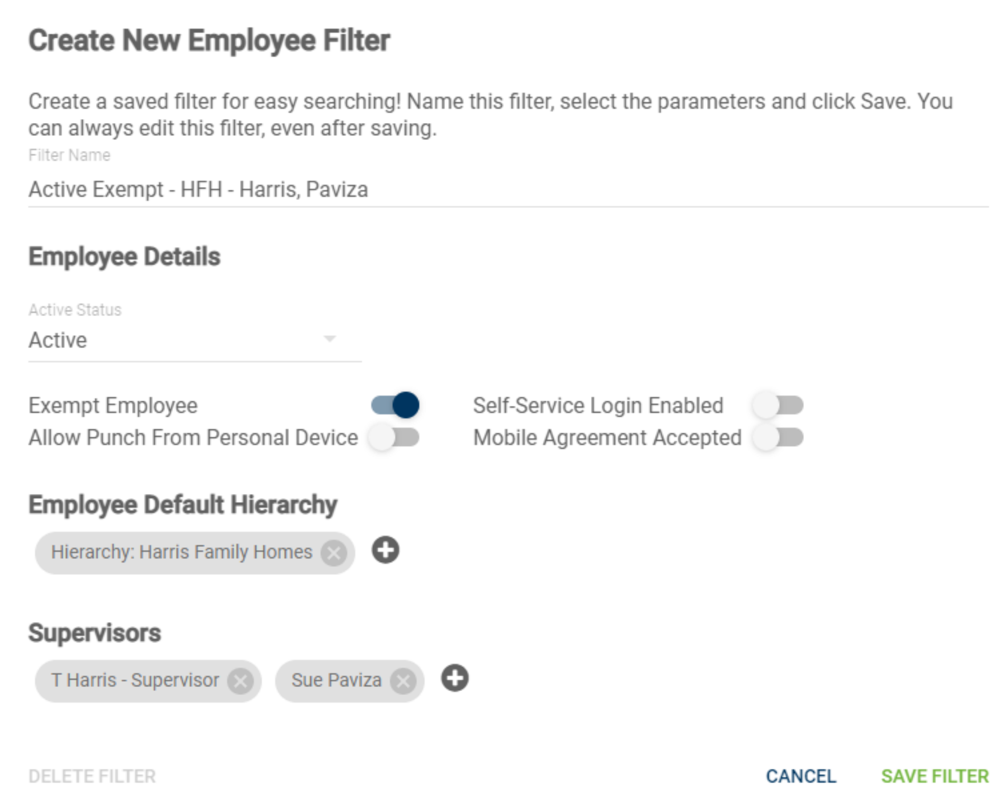
# Creating a New Employee Filter

If you would like to set custom filters, you can do this via the Filter Template creator.

**Step 1:** Click on **Create New Filter**, found directly under the Employees section header.




**Step 2:** On the **pop-up**, enter all the parameters you want to set for this filter. Be sure to enter a recognizable **Filter Name**. Once finished, click **Save Filter**.



## Adding Employees

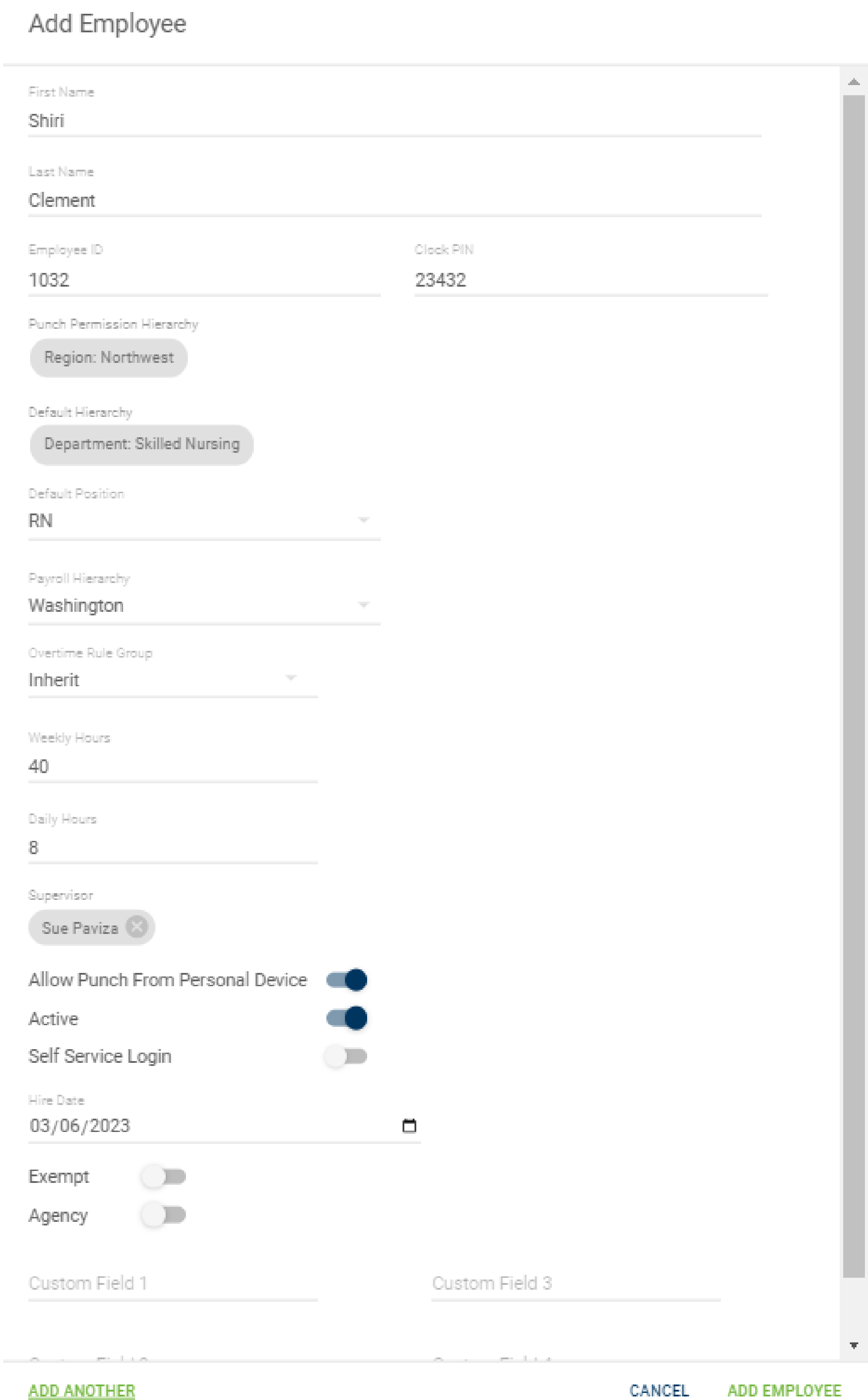
**Step 1:** To add a new employee, click the green **"+" icon** on the upper right.

**Step 2:** On the pop-up, add the following information:

- First Name and Last Name
- Employee ID
- Clock PIN
- **Punch Permission Hierarchy** determines where employees can punch in/out of within the organization. Employees can punch in and out at any hierarchy item at or beneath their assigned hierarchy level.
- **Default Hierarchy** is the hierarchy level where the employee will appear.
- **Payroll Hierarchy** is the hierarchy where the employee will be included when processing payroll.
- Overtime Rule Group
- Weekly Hours – If left blank, defaults to "0."
- Daily Hours – If left blank, defaults to "0."
- Supervisor
- Allow Punch from Personal Device – Defaults to "off."
- Active toggle – Defaults to "on."
- Self-Service Login toggle – Defaults to "off."
- Custom Fields
    - You can select up to four custom fields. Fields must already exist in OnShift Time (added under Account > Settings > Custom Fields).
    - If left blank, defaults to remain empty.

**Step 3:** Click **Add Employee** and they will be added to the list of employees.

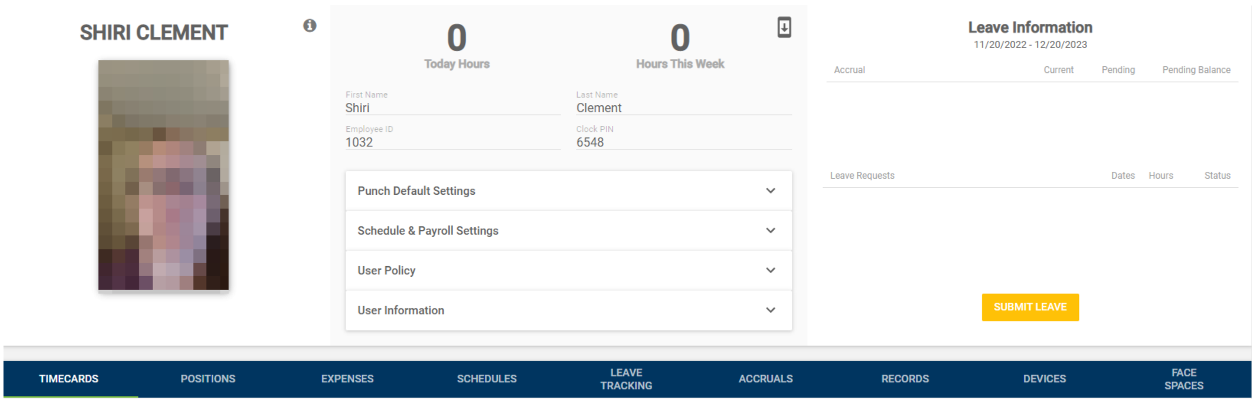
Once an employee is added to OnShift Time, you can edit their employee profile at any time.


Add Employee
First Name
Shiri
Last Name
Clement
Employee ID
1032
Clock PIN
23432
Punch Permission Hierarchy
Region: Northwest
Default Hierarchy
Department: Skilled Nursing
Default Position
RN
Payroll Hierarchy
Washington
Overtime Rule Group
Inherit
Weekly Hours
40
Daily Hours
8
Supervisor
Sue Paviza
Allow Punch From Personal Device
Active
Self Service Login
Hire Date
03/06/2023
Exempt
Agency
Custom Field 1
Custom Field 3
ADD ANOTHER
CANCEL
ADD EMPLOYEE

# Editing an Employee Profile

To edit an **employee profile**, begin by clicking their name from the employee list. Within the profile, you can view the employee's leave information, timecards, positions, expenses, schedules, leave tracking, accruals, records, devices, and face spaces.

**Note:** Employee profile information may be controlled by integration from your HR/payroll system. If so, it is a best practice to *not* make manual edits to this section in OnShift Time.

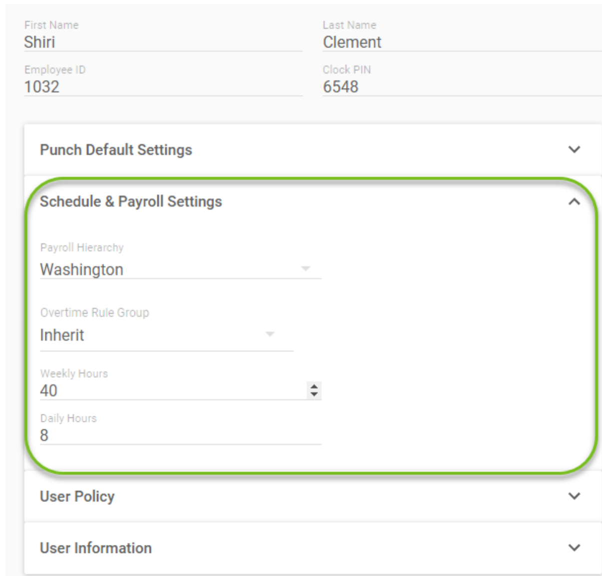



The worker's name appears on the upper left. Underneath is a photograph of the employee, captured from their face spaces.

The top middle of the profile displays the number of hours the employee has worked so far today and this week. Name, employee ID, clock PIN, and punch default settings that were entered while creating the employee are also displayed and can be edited.

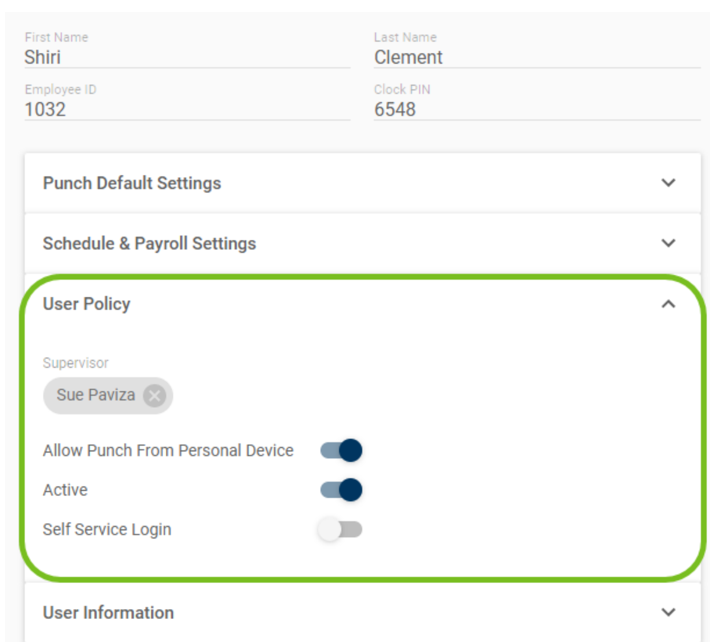
**Punch Default Settings** include the Punch Permission Hierarchy and Default Hierarchy assigned when adding an employee. They can be edited here. The employee's **Default Position** can be added in these settings. When added, this position will appear by default when the employee goes to log in.

**Schedule & Payroll Settings** displays the **Payroll Hierarchy** previously set. Any **Overtime Rule Group** settings can be edited here.




The **Weekly Hours** and **Daily Hours** fields are used to specify a worker's **committed weekly or daily hours**. Among other uses, these informational fields can be helpful when proofing timecards to ensure employees have met their committed hours.

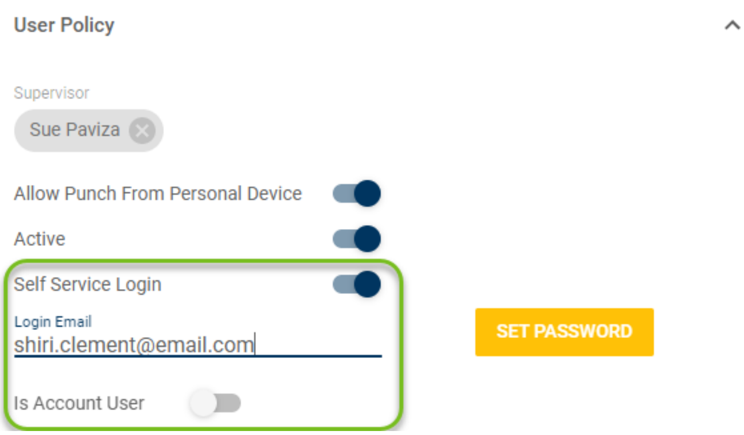
**User Policy** on the employee profile displays the employee's **supervisor** and specific permissions, including whether to **Allow Punch from Personal Device** and whether the employee is active.



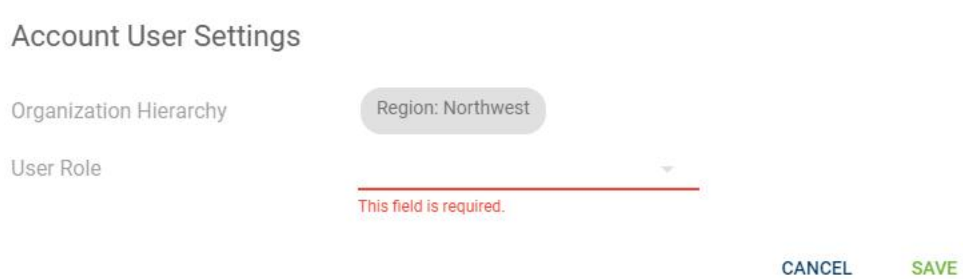
Use the **Self Service Login** option to give the employee user access as a manager or other role within a specified hierarchy:

**Step 1:** Select **Self Service Login**. Once selected, a box to input the employee's email address will appear.

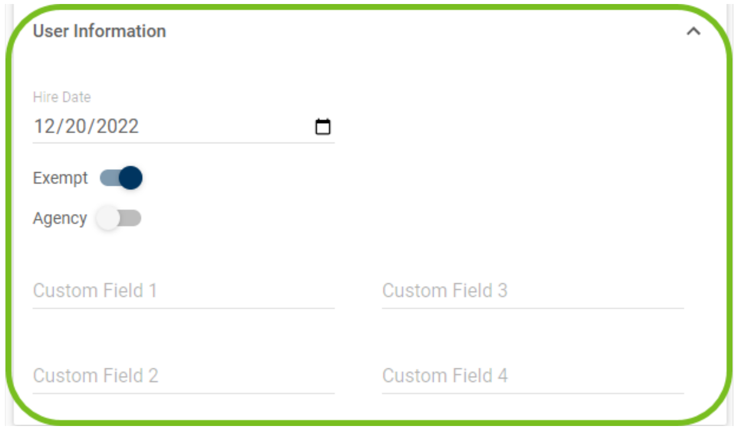
**Step 2:** Enter the employee's **email address**. Once entered, an option for **Is Account User** will appear.




**Step 3:** Select **Is Account User**. Once selected, a popup will appear prompting you to select the **Organization Hierarchy** for this employee, as well as their **User Role**. Make the appropriate changes and **Save** to complete.



The **User Information** section allows you to add the employee's **Hire Date**, define whether the employee is Exempt or Agency, and add custom fields of information.




The bottom section of the employee profile displays employee-specific information, including timecard details and leave tracking, discussed elsewhere in this guide. Note that you can also update these details here on the employee profile.

## Adding Employee Positions

You can add an employee's positions under the **Positions module** on their profile.

**Step 1:** Scroll to the bottom of the employee profile and click on **Positions**.
**Step 2:** Click on the green **"+" icon**.
**Step 3:** In the pop-up, select a **Usable Position** to add to the employee profile, then click **Copy Of**. The system will add relevant details for the Name, Cost Center, Description, and Pay Type.
**Step 4:** Click **Add Position**. The position will be added to the employee's profile.

# Adding Leave Tracking

You can review, add, and edit Employee Leave directly from the employee profile. Leave items can be filtered and viewed in a list or on a calendar. Click the green **"+" icon** to add a new request. You will be prompted the same information and follow the same steps as in the Leave Requests section of this guide.

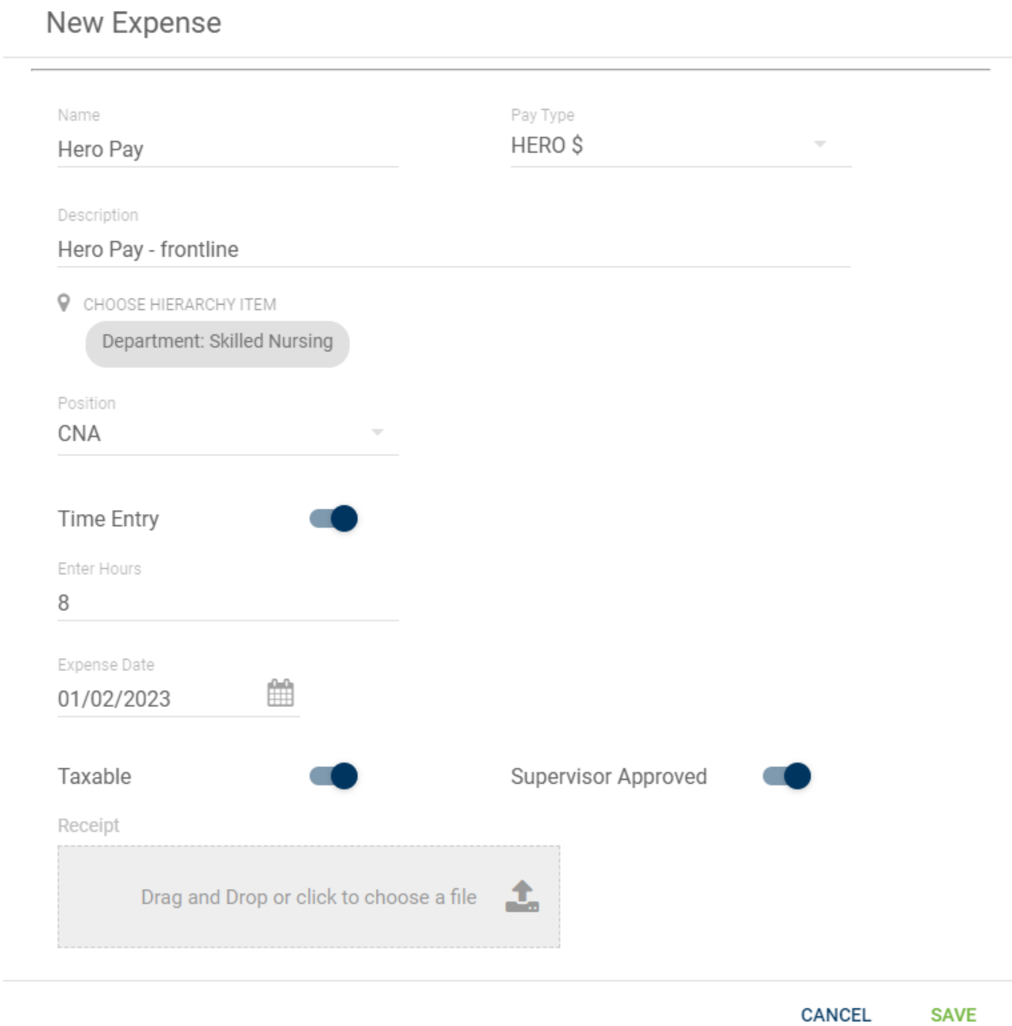

# Adding Expenses

The **Expenses module** is used to include added pay or expenses on an employee profile so it can be processed and added to payroll or processed as a separate transaction.

**Step 1:** At the bottom of the employee profile, click on **Expenses**.
**Step 2:** Click on the green **"+" icon**.
**Step 3:** In the pop-up, enter the **expense details**. Expenses can be based on **Dollars** or **Hours**.

- **Dollars** – Enter expense name, pay type, description, amount, date to credit the item, and other supporting documentation.
- **Hours** – Enter expense name, approved pay type, description, **select Time Entry**, hours date to credit the item, and other supporting documentation.

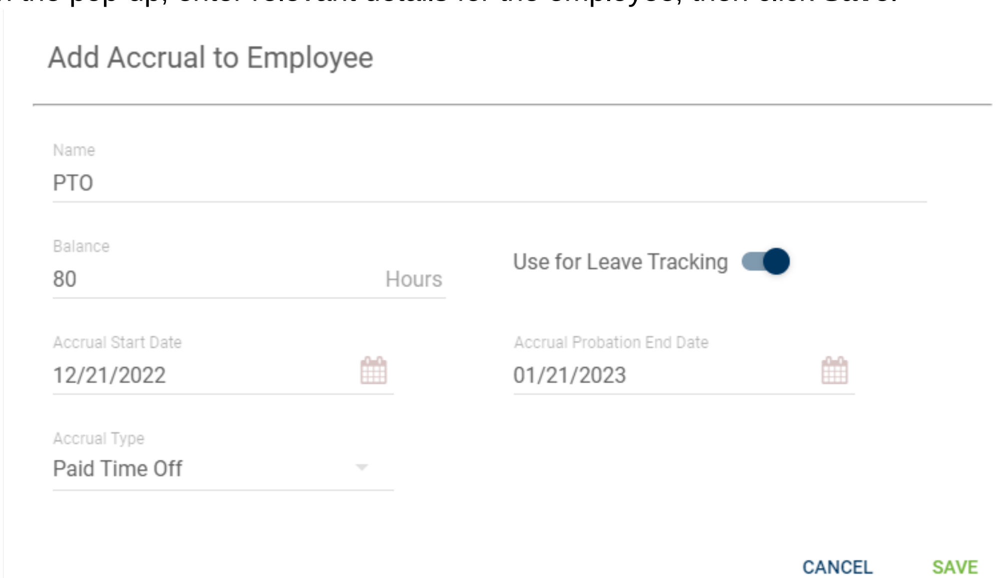
**Step 4:** Click **Save** and the expense entry will appear on the employee profile.


New Expense
Name
Hero Pay
Pay Type
HERO $
Description
Hero Pay - frontline
CHOOSE HIERARCHY ITEM
Department: Skilled Nursing
Position
CNA
Time Entry
Enter Hours
8
Expense Date
01/02/2023
Taxable
Supervisor Approved
Receipt
Drag and Drop or click to choose a file
CANCEL
SAVE

## Adding Accruals

**Note:** Accruals information may be controlled by integration from your HR/payroll system. If so, it is a best practice to not make manual edits in OnShift Time.

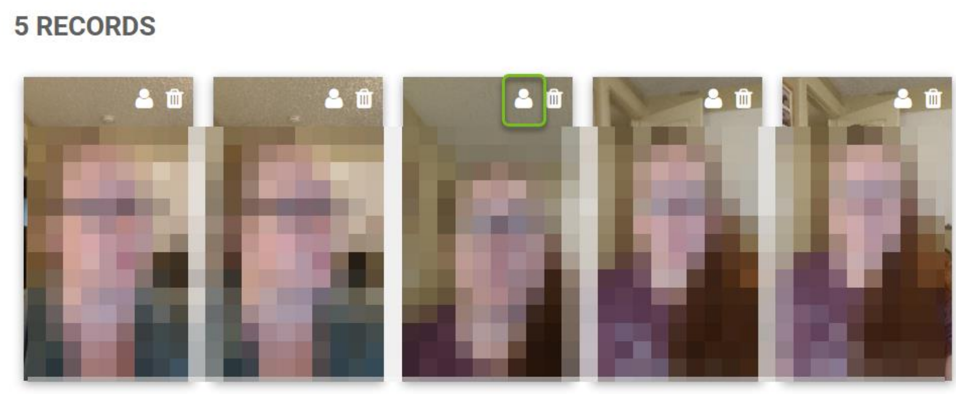
**Step 1:** At the bottom of the employee profile, click on **Accruals**.
**Step 2:** Click on the green “**+**” icon.
**Step 3:** In the pop-up, enter relevant details for the employee, then click **Save**.



## Updating Employee Profile Image Using Face Spaces

During an employee's facial recognition training, five pictures are taken and saved as **face spaces**. One picture is randomly selected to be the profile picture for that employee and will be viewed across OnShift Time and on devices within your organization. Occasionally, employees will request a profile picture change.

**Step 1:** Navigate to the **Employees** menu and **search** for the employee.
**Step 2:** Click on the **Face Spaces** section to view all photographs.
**Step 3:** On the photo that will be the new profile picture, click the **person icon**.
**Step 4:** Confirm the change by clicking **Update** on the confirmation prompt.




**Note:** Profile pictures can only be selected from the face spaces. However, an employee's face spaces are continually updated as employees punch in and out. You can also delete photos from face spaces by clicking the **trash can icon**.

# Records

The **Records** section shows a **log of employee details**, including the date, time, and location where each employee punched from. If the employee punched in or out from a device with location enabled, an image and map will also appear on the record for that punch. The name of the device used to punch and the biometric score are also provided.

Individual records can also be found on each employee profile in the Employees section, under the Records module.

**Records** Mon Nov. 21, 2022 — Wed Dec. 21, 2022 Filter: All

| Image | Map | Employee | Location | Device Name | Biometric Score | Exception | Date | Time |
|---|---|---|---|---|---|---|---|---|
| | | Tova Loncar | Skilled Nursing | Phone | 98.99% | | Dec. 20, 2022 | 12:55 PM |
| | | Homer Cuyler | Skilled Nursing | Phone | 95.82% | | Dec. 20, 2022 | 12:55 PM |
| | | Shiri Clement | Skilled Nursing | Phone | 97.85% | | Dec. 20, 2022 | 12:54 PM |
| | | Shiri Clement | Skilled Nursing | Phone | 98.99% | | Dec. 20, 2022 | 12:29 PM |
| | | Homer Cuyler | Skilled Nursing | Phone | 96.29% | | Dec. 20, 2022 | 11:51 AM |

# Devices

OnShift Time allows employees to arrive at work and quickly punch in with ease, without the need for expensive time clocks.

OnShift Time works on Android and iOS tablets and smartphones. Once employees are registered in OnShift Time, they can download the OnShift Time app from the Google Play or Apple App store to begin punching in and out.

## Registering Devices

You can register devices in three different modes. Your organization can use any combination of modes simultaneously, as all modes synchronize and work together. Check with your organization to confirm which modes you use and support.

- **Clock Mode** – devices that can be used by anyone in the company *and* are tied to a specific location. For example, a tablet on the wall at the location.
- **Mobile Clock Mode** – devices that can used by anyone in the company and are *not* tied to a specific location. For example, mobile devices assigned to location supervisors.
- **Individual Mode –** employee devices that can only be used by the registered individual.

**Note:** Mobile clock mode accounts for the user's default hierarchy, where clock mode always populates with the device's assigned hierarchy, ignoring punch permissions.

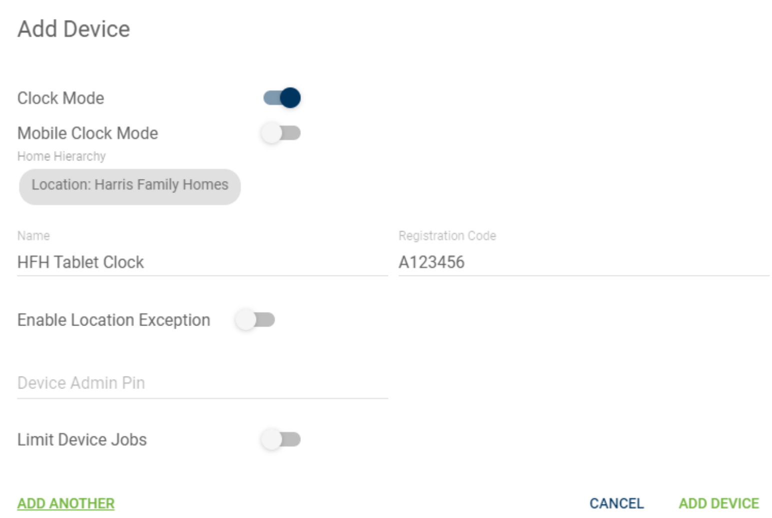
### *Registering a Clock Mode or Mobile Clock Mode Device*

Any devices that will be set up for clock mode or mobile clock mode need to be registered through an account administrator.

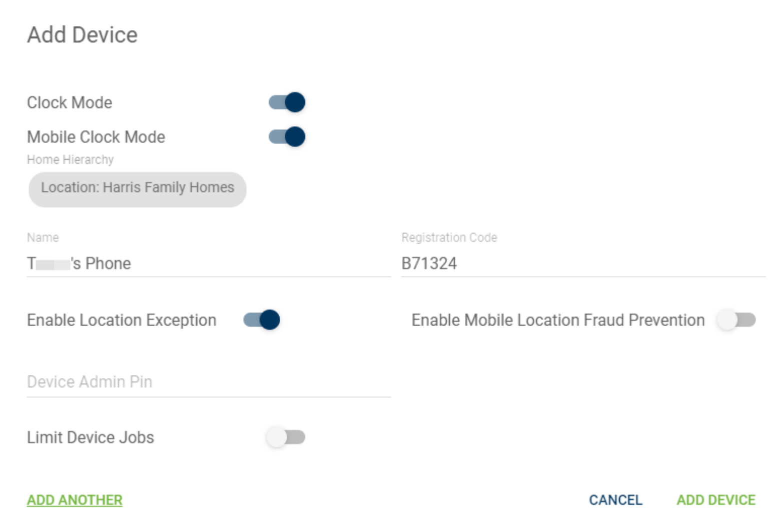
**Step 1:** In OnShift Time, filter to the correct hierarchy level for the device use and navigate to the **Devices** menu.
**Step 2:** Click the green "**+**" icon.
**Step 3:** Open the **OnShift Time app** on the device. Once open, you will see a **Registration Code**.
*Continue following steps for one of the options below, depending on your clock mode need.*

**Register a Clock Mode Device**
If you are registering a device as clock mode:
**Step 1:** Toggle the **Clock Mode** setting.
**Step 2:** Add the device to a **home hierarchy level**. Clock mode devices cannot be added to the account level.
**Step 3: Name the device**, typically with the location name or naming convention your organization implements.

**Step 4:** Add the **registration code** found in the OnShift Time app on the device.
**Step 5:** Since Clock Mode devices typically are stationary, **turn off Enable Location Exception.**
**Step 6:** Click **Add Device**.




**Register a Mobile Clock Mode Device**
If you are registering a device as mobile clock mode:
**Step 1:** Toggle the **Clock Mode** setting AND the **Mobile Clock Mode** setting.
**Step 2:** Add the device to a **home hierarchy level**.
**Step 3: Name the device** with whatever naming convention your organization implements.
**Step 4:** Add the **registration code** found in the OnShift Time app on the device.
**Step 5:** Since Mobile Clock Mode devices typically are not stationary, **leave the Enable Location Exception on**.
**Step 6:** Click **Add Device**.



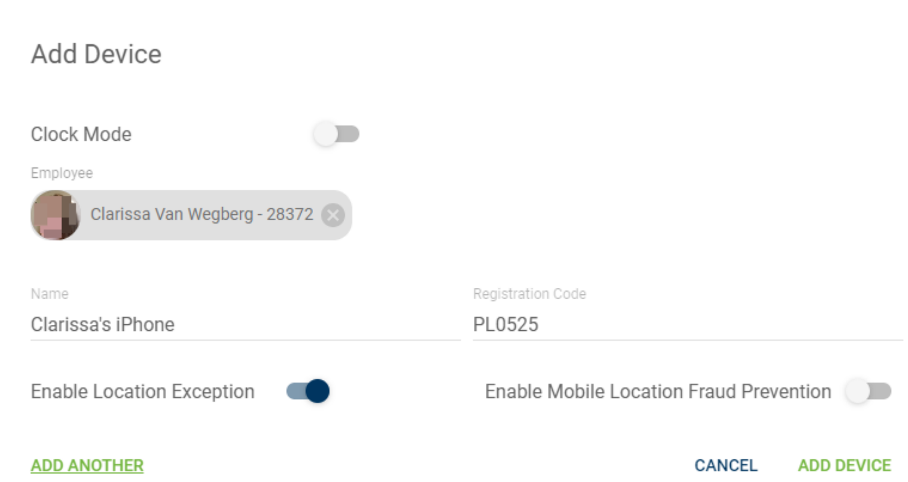
## *Registering an Individual Mode Device*

There are two options to register devices for use in individual mode. You can either register employee devices through an administrator or allow employees to self-register through their own email.

Note that “allow punch from personal device” must be toggled blue in order to punch from the device. If it is not, the employee will only be able to view timecards, request time-off, etc. as applicable.

**Register Through an Administrator**

**Step 1:** Go to the **employee’s profile**. Open the **Devices** tab at bottom and click the **“+” icon**.
**Step 2: Name the device**, typically with the employee’s name and the type of the device.
**Step 3:** Add the **registration code** found in the OnShift Time app on the device.
**Step 4: Keep Enable Location Exception on** as best practice. This will enable geofence violations to be recorded as exceptions for that employee.
**Step 5:** Click **Add Device**.




**Employee Self-Registration**

***Pre-Requisites:***

- The **employee** must already be **added** into OnShift Time.
- The **OnShift Time application** must be **downloaded** on the employee's device.
- The employee's **email** must be **added** to their profile.

***Self-Registration Steps***

**Step 1:** Give your **email address** to your account administrator (if not done so already).
**Step 2:** Open the **OnShift Time app** on your iOS or Android device. Upon opening the app for the first time, you will be presented with the choice to either self-register the device or register through their administrator – select **Register by Your Email**.
**Step 3:** Enter the **same email address** that you gave your administrator. A new prompt will appear for you to enter in a registration code.

**Step 4: Check your email** for an email from noreply@time.onshift.com. This email contains the **registration code**.
**Step 5: Enter the code** in the OnShift Time app and click **OK**.

***Note for Administrators***
When an employee self-registers a new device, the new device will show in OnShift Time in the employee's profile under the **Devices** module. The name will default to "{Employee's First Name} Device" and location exceptions will be automatically turned on for the new device.

## Device Monitoring

From the Devices section, you can view all devices within the hierarchy level and view the Status of each device.

Monitor device status regularly. If a device hasn't connected in the past hour, the device status will turn to red. Devices should connect to the server every time someone punches. If a device has not connected to the server for an extended period, try moving the device to an area that has better Wi-Fi and manually synchronize the data.

**Devices**

| Name | Home Hierarchy | Status | Connected | Type | Code | Mode | OS |
|---|---|---|---|---|---|---|---|
| T[redacted]'s Phone | Location: Harris Family Hom... | | 2 minutes ago | WiFi | B71324 | Mobile Clock Mode | Android |
| Central Clock | State Community: Ohio HQ | | 10 days ago | WiFi | 843740 | Mobile Clock Mode | Android |
| C Personal Phone | Company: Company ABC | | 19 days ago | Cell... | D47EDB | Individual Mode | iOS |