Timesheet Setup

This user guide is designed to help Program Directors select the optimal timesheet format and period for their program's needs. Step-by-step instructions are available to setup timesheets.

AmeriCorps Member

Member timesheets are the most popular time-tracking tool within OnCorps Reports. For that reason, this category of timesheet offers the greatest variety of customization options.

The setup process for member timesheets includes the following steps:

1. Timesheet Rules (influenced by setup of other records)
2. Select a Format
3. Customize Layout
4. Add Timesheet Dates (period setup)

Most of the steps within this process (2-4) are accessible via the **Tools > Administrative Tools** menu under Timesheet Setup and Timesheet Dates. This setup is typically done at the start of a new program year.

It is recommended you read through all steps before you begin program timesheet setup. Please feel free to contact the help desk with any program-specific questions, either by submitting a help ticket or emailing help@oncorpsreports.com.

Timesheet Rules

All member timesheets will enforce these general rules, many of which are set by data entered into the Member Record:

- Members are not able to enter or submit time that occurs before the "Service Start Date" set in their Member Record under "Account Information".

    * Service Start Date: | 08/01/2015 | (mm/dd/yyyy)
    (eg; 09/01/2008)

- Members cannot enter time between suspension dates entered in the "Suspensions" section. This range is *inclusive*, so the day after the reinstatement date is when time entry will be available again.

Suspensions	
Date Suspended #1: 10/26/2015	Date Reinstated #1: 11/08/2015

- Timesheets can only be approved by a supervisor to whom the member is assigned within their record in the "Supervisors" section, or reviewed by Program Directors who have overview of their record.

* Supervisor #1:	Colette O'Day
	Timesheets to Approve
Supervisor #2:	Otto Delupe : Classic Test 2 ▼
Supervisor #3:	Select One ▼
Supervisor #4:	Select One ▼

- If multiple supervisors are indicated in the Member Record, the member will be prompted to select one, multiple, or all when submitting the timesheet.

- Supervisors are not able to approve a timesheet until after the latest time entry in the timesheet has passed (i.e. timesheets containing future hours). They are able to navigate to the timesheet to look it over, and can reject it if errors are found, however the approval option will be disabled:

Approve/Reject Time sheet(s) (select one)

○ I have reviewed and **approve** this Time sheet(s).
Time entered after today's date, this timesheet cannot be approved until after the date of the last time entered

- All timesheet actions are timestamped to the user who took the action, and become a part of the timesheet's history.

Timesheet History

Status	Date	Time	User	User Type
Submitted	11/03/2015	7:08AM	Paolo C. Wonk	AmeriCorps Member
Approved	11/03/2015	7:09AM	Colette O'Day	Site Supervisor

Select a Format

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There are two available formats for Member Timesheets, and each offers a different layout and set of available features:

Standard	**Enhanced**
Enter duration of **time by subcategory** for each day.	**Time-in and time-out** tracking available with up to 7 lines per day.
3 main categories provided which are compliant with CNCS requirements: Fundraising, Service, and Training.	**5 main categories** provided to allow greater tracking flexibility: Fundraising, Service, Training, Time-Off, and Lunch.
Create up to **4 subcategories** for Service and Training to gather more specific data.	Up to **20 subcategories** for each main category can be created, allowing for detailed time data collection.
All approved time is counted toward a member's hour commitment for tracking and reports.	Subcategories can be marked as "Include" or "Exclude". **Those marked "Exclude" will not count** toward a member's hour commitment (usually used for vacation or lunch time).
Within reports, member's time will count for the service site affiliated with their primary supervisor.	Ability to **track time in-line by service site** for members who travel between sites.

The standard format is the most popular overall, and for the majority of programs it offers everything you need in a very simple and easy-to-use package. However, if your program has more specialized requirements, you may want to select the enhanced format.

For example, many California programs need to track that members are taking a lunch break during the day. This can only be accommodated by the enhanced format, which allows for a lunch main category and time tracked to that can be excluded from a members overall approved total while still appearing on a timesheet.

If you are still unsure, take a look at an example of the Standard and the Enhanced format, and feel free to reach out to our help desk at help@oncorpsreports.com with any questions!

Standard Example:

This time sheet is DUE: 10/16/2015

Day	Fund raising	AmeriCorps Member Development	Educational Support Certification	Life after AmeriCorps	Mentoring English Language Learners	Math Tutoring	Reading Tutoring	Classroom Assistance	Total Hours
Mon Sep 28	0	2	2	1	2	0	1	0	8
Description:	Comment One								
				989	characters left				
Tue Sep 29	0	1	.5	.5	.5	0	0	5.5	8
Description:	Comment Two								
				989	characters left				
Wed Sep 30	0	0	.75	.75	1.25	2.5	.75	2	8
Description:	Comment Three								
				987	characters left				
Thu Oct 1	0	0	0	0	0	0	0	0	0
Description:									
				1000	characters left				
Fri Oct 2	0	0	0	0	0	0	0	0	0
Description:									
				1000	characters left				

Enhanced Example:

This time sheet is DUE: 11/12/2015

Wed Nov 4	Time In	AM/PM	Time Out	AM/PM	Category	Service Site	Description/Activity	Total	8
	09:15	● AM ○ PM	12:30	○ AM ● PM	Adult ELL	Barrayar Center	test hour	3.25	
	12:30	○ AM ● PM	01:15	○ AM ● PM	Mandatory Lunch Break	Barrayar Center		0.75	
	01:15	○ AM ● PM	03:30	○ AM ● PM	Classroom support	Save Our Land	assisted with theater	2.25	
	03:30	○ AM ● PM	05:00	○ AM ● PM	Direct Service- Mentoring	Save Our Land	after school homework help and mentorship	1.5	
	05:00	○ AM ● PM	06:00	○ AM ● PM	Classroom support	Barrayar Center	entering gradebook documentation	1	
		○ AM ○ PM		○ AM ○ PM	Select One	Barrayar Center		0	
		○ AM ○ PM		○ AM ○ PM	Select One	Barrayar Center		0	

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Customize Layout

Both timesheet formats allow you to modify certain features in order to create a final timesheet presentation that best matches your program workflow and terminology.

1. Navigate to **Tools > Administrative Tools > Timesheet Setup**.

2. The format selection page will display:

3. Select the radio button next to the format of your choice.

4. Click the **Save** button.

5. **Timesheet Options** and **Subcategory Setup** forms specific to your format choice will display. See subsections below for details on your options.

6. Select the options you desire to apply.

7. When finished, you can:

   a. **Save** to finalize this timesheet setup and return to your home screen.

   b. **Save and Setup Timesheet Dates** to finalize this timesheet and move to the next step in the process, creating timesheet periods.

   c. **Cancel** to clear your selections and return back to the home screen.

Standard
Include/Exclude Description boxes:

Select line-by-line description preference:
- ⦿ Include boxes for members to explain category selection in greater detail
- ○ Exclude description boxes on timesheets (members will still have a comments box)

Here is what the description box looks like on a standard timesheet format:

The default for this customization is to include the description input boxes to allow members to provide greater detail about how their time was spent. This can be a useful communication tool, and provides more information to supervisors about member efforts.

However, some organizations prefer to not provide an additional input box here, because it ultimately is more information that anyone approving needs to review.

Note: If you do include descriptions, you can still download or print the timesheets without the descriptions to save space.

Supervisor Approval Language:

Select supervisor approval language option:
- ○ Use default approval/rejection text.
  - ○ I have reviewed and approve this time sheet.
  - ○ I have reviewed and DO NOT approve this time sheet.
    (Member will be notified via. e-mail to correct and re-submit this time sheet)
- ⦿ Write customized supervisor approval text.

Timesheet Approval Agreement Text:

I certify that these hours have been served at my member's service site.

3000 characters left

Timesheet Rejection Text:

These hours look incomplete or incorrect, please revise and resend within 48 hours.

3000 characters left

Supervisor approval language refers to the text that will display next to the Approve and Reject actions on a timesheet when it displays for supervisor approval. This text can be used to customize approval language in order to include state or program specific requirements.

Approve/Reject Time sheet(s) (select one)
○ I have reviewed and **approve** this Time sheet(s).   Approval Agreement
○ I have reviewed and **DO NOT approve** this Time sheet(s). (AmeriCorps Member will be notified to correct and re-submit this time sheet)
Comments:

Rejection

1000   characters left

The default language, which is the original approval and rejection text, is shown under the first radio button option. If you select "write customized supervisor approval text", you will need to enter text in both the Approval Agreement and Rejection text areas.

Sub-categories

Service #1	
Service #2	
Service #3	
Service #4	

With the standard timesheet, you are provided up to 4 subcategories within the Service and Training main categories. This allows you to collect more detailed information about how service or training time is being used within your organization.

When you enter text in the input boxes shown on the right hand side, each text option becomes a sub-header with its own daily input box for time:

Subcategory

Service			
Mentoring English Language Learners	Math Tutoring	Reading Tutoring	Classroom Assistance
0	0	0	0

If you choose not to enter specific categories, the default option will provide one input for each of the Main category options (Fundraising, Training, and Service).

You can add additional categories during the year by editing your program record; however, it will change the input options for all timesheets that year.

*Note: You cannot **remove** subcategory options during the year, so it's a good idea to think about what will be needed in advance!*

Enhanced

Line-by-line descriptions:

Select line-by-line description preference:
- ● Include boxes for members to explain category selection in greater detail
- ○ Exclude description boxes on timesheets (members will still have a comments box)

Here is what the description box looks like on an enhanced timesheet format:

The default for this customization is to include the description input boxes to allow members to provide greater detail about how their time was spent. This can be a useful communication tool, and provides more information to supervisors about member efforts.

However, some organizations prefer to not provide an additional input box here, because it ultimately is more information that anyone approving needs to review.

Note: *If you do include descriptions, you can still download or print the timesheets without the descriptions to save space.*

Timesheet hour/minute entry preference:

Timesheet hour/minute entry preference:
- ● Time in/out must be entered in 15-minute increments. (e.g.; 5:15, 5:30, etc.)
- ○ Time in/out can accept any valid-formatted time. (e.g.; 5:27)

The default is to validate time input to 15-minute increments, so that total time is also expressed to the quarter-hour. This is often preferred by organizations, because it rounds to a neat two-decimal value.

We have worked with some organizations where they prefer to have members enter time to the nearest 6 or 10 minute increment, or even down to the minute. If it is necessary for your program to track time down to smaller intervals than 15 minutes, you will want to select the second option which allows "any valid-formatted time". Keep in mind if you select this option that *any* valid time will be allowed, so if there is a different interval you wish members to round time to you will need to communicate and train them to your specific standard, since the form will not automatically validate to other intervals.

Supervisor approval language:

Select supervisor approval language option:
○ Use default approval/rejection text.

    ○ I have reviewed and approve this time sheet.
    ○ I have reviewed and DO NOT approve this time sheet.
       (Member will be notified via. e-mail to correct and re-submit this time sheet)

◉ Write customized supervisor approval text.
Timesheet Approval Agreement Text:

> I certify that these hours have been served at my member's service site.

| 3000 | characters left |

ABC ✓

Timesheet Rejection Text:

> These hours look incomplete or incorrect, please revise and resend within 48 hours.

| 3000 | characters left |

ABC ✓

Supervisor approval language refers to the text that will display next to the Approve and Reject actions on a timesheet when it displays for supervisor approval. This text can be used to customize approval language in order to include state or program specific requirements.

Approve/Reject Time sheet(s) (select one)

○ I have reviewed and **approve** this Time sheet(s).   → Approval Agreement

○ I have reviewed and **DO NOT approve** this Time sheet(s). (AmeriCorps Member will be notified to correct and re-submit this time sheet)

    Comments: → Rejection

| 1000 | characters left |

The default language, which is the original approval and rejection text, is shown under the first radio button option. If you select "write customized supervisor approval text", you will need to enter text in both the Approval Agreement and Rejection text areas.

Main categories:

The enhanced timesheet offers two additional main categories compared to the standard; Lunch and Time-Off. Even if a category does not have subcategories associated with it, it will still show up in the category drop down list. For that reason, if you intend to never use a main category, you can delete it at this stage.

Main Category	
Fundraising	Delete
Lunch	Delete
Service	Delete
Time-Off	Delete
Training	Delete

*Note: Deletion of a main category for the year **cannot be undone**, unless you contact the help desk (help@oncorpsreports.com) to reset your timesheet setup selections.*

Sub-categories:

A maximum of 20 subcategories can be created for each main category, allowing for a total of 100 specific subcategories for the enhanced form.

Main Category	Sub-Category	Hours	
▼		⦿ Include ◯ Exclude	Add

To add a new subcategory, on the first line:

1. Select a main category from the drop down list provided.
2. Enter a name or short description for the sub category.
3. Select whether these hours should be included in time that counts toward a member's service agreement. For example, many programs ask members to enter when they took their lunch break, but lunch time does not count toward service.
4. Click the **Add** button.

Any added subcategories will display in table format beneath the first line, and are editable.

Timesheet Dates

Timesheet dates should only be setup once you've selected and customized your chosen format; as soon as period setup is finalized, timesheets will be available to members with active accounts.

1. Navigate to *Tools > Administrative Tools > Timesheet Dates*, or click **Save and Setup Timesheet Dates** at the bottom of the format customization page.
2. Enter a **Starting Date**. This is the first day of the first period for which you want timesheets to be available to members. Keep in mind the type of periods you have; if you are doing monthly timesheet periods, you will probably want the starting date to be the first day of the month, etc.

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Note: Members will not be able to enter time until their own member start date, so there is no harm in setting a period Starting Date early.

3. Enter an **Ending Date**. It's a good idea to select a final day that is a period or two past when you anticipate the end of the program year, since grants are often extended. If you do find you need additional periods, you will need to contact the help desk (help@oncorpsreports.com) to add them for you after the initial setup.

4. Select the timesheet period duration. This is how often timesheets will recur. Options include:
    a. **Weekly**: Periods will be one week long, each starting on the weekday of the Starting Date.
    b. **Bi-weekly**: Periods will be two weeks long, each starting on the same weekday as the Starting Date.

c. **Twice per Month**: Periods will consist of the 1st-15th or 16th – last day of the month. If you pick a starting date that is not the 1st or 16th, no period will be created until the next closest date that is the 1st or 16th.

d. **Monthly**: Month long periods, starting each month on the same day as the Starting Date (e.g. if I select 9/17 as the start date, each time period will begin on the 17th).

5. Enter a **Due Date Interval**. This is the deadline by which you expect members to have submitted their time for a period, expressed as the number of days after the period end.

6. Optional: Enter a **Supervisor Approval Due Date Interval**. While not required, this allows you to reinforce an expectation for when supervisors need to have approved time for any given period. If a number is entered, supervisors will get additional late notifications as and after this date approaches for timesheets pending their approval.

7. Click the **Continue** button.

8. Beneath the timesheet setup form, a table will display showing all time periods which would be created for the given parameters.

Period Start	Period End	Member Submission Due
6/1/2015 (Monday)	6/30/2015 (Tuesday)	7/2/2015 (Thursday)
7/1/2015 (Wednesday)	7/31/2015 (Friday)	8/2/2015 (Sunday)
8/1/2015 (Saturday)	8/31/2015 (Monday)	9/2/2015 (Wednesday)
9/1/2015 (Tuesday)	9/30/2015 (Wednesday)	10/2/2015 (Friday)
10/1/2015 (Thursday)	10/31/2015 (Saturday)	11/2/2015 (Monday)
11/1/2015 (Sunday)	11/30/2015 (Monday)	12/2/2015 (Wednesday)
12/1/2015 (Tuesday)	12/31/2015 (Thursday)	1/2/2016 (Saturday)
1/1/2016 (Friday)	1/31/2016 (Sunday)	2/2/2016 (Tuesday)
2/1/2016 (Monday)	2/29/2016 (Monday)	3/2/2016 (Wednesday)
3/1/2016 (Tuesday)	3/31/2016 (Thursday)	4/2/2016 (Saturday)

Submit   Cancel

9. Review the periods.

10. If the periods match your needs, click **Submit** to create the timesheet periods for members to submit time against.

Once you have selected a format, customized options, and submitted timesheet dates, any active members will be able to begin entering time and submitting timesheets.

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