UNM HUMAN RESOURCES

SESSION 3: PHASE 2 LOBOTIME TRAINING

PREPARED BY ARIELLE SLONE, SR HR CONSULTANT

EMILY LUHMAN, DEPUTY CHRO

Agenda

- Approval Workflows

- Supervisor Experience
  - General Navigation
  - Non-exempt Employees
    - Navigating a non-exempt timecard
    - Reviewing a missed punch
    - Correcting a punch
    - Approving a timecard
  - Exempt Employees
    - Navigating an exempt timecard
    - Approving a timecard
  - Approving Leave
  - Filtering Employee Lists
  - Delegation

Meeting Protocol

- Limit questions to the content being presented

- Questions should be submitted via chat
  - For questions that can be answered via the chat, LoboTime Team members will respond

- Do not unmute to ask a question during the presentation

- Tuesday Drop-in Session will address questions during training session

- Weekly Recap will summarize training content and questions

- Meetings will be recorded and posted on https://time.unm.edu/

Phase 2 Training Objective

After completion of Phase 2 LoboTime Training, you should understand:

- Employee, Supervisor, and Org Manager roles
- Expectations for Org Managers
- Basic System Functionality
- LoboTime Support Resources

- Demonstrations of LoboTime functionality progressing from basic to advanced

LoboTime Workflow
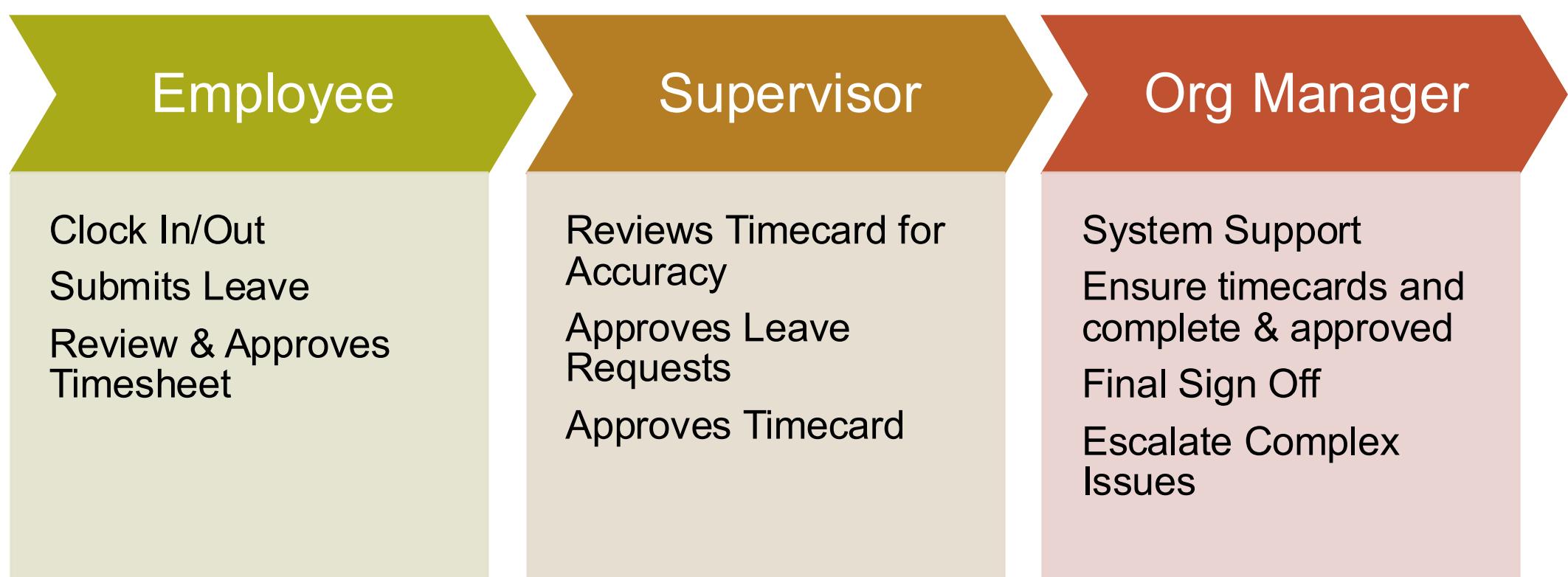
Employee

Clock In/Out

Submits Leave

Review & Approves Timesheet

Supervisor

Reviews Timecard for Accuracy

Approves Leave Requests

Approves Timecard

Org Manager

System Support

Ensure timecards and complete & approved

Final Sign Off

Escalate Complex Issues

Lifecyle of a Pay Period

Standard Review Process

Example:
- Non-exempt employee
- Works M-F

Best practice is for supervisor to review and approve timecard.

Best practice is for Org Manager to review timecards for errors and monitor approvals.

Week 1: Mon

Employee: Clock In/Out

Week 1: Tues

Employee: Clock In/Out; Reviews Timecard; Corrects Errors

Week 1: Wed

Employee: Calls In Sick; Requests Sick Leave

Supervisor: Reviews Timecards; Approves Corrections; Approves Leave

Week 1: Thurs

Employee: Clock In/Out; Reviews Timecard; Corrects Errors

Week 1: Fri

Employee: Clock In/Out; Reviews Timecard; Corrects Errors

Org Manager: Reviews Timecards for errors

Week 2: Mon

Employee: Clock In/Out; Reviews Timecard; Corrects Errors

Supervisor: Reviews Timecards; Approves Corrections; Approves Leave

Week 2: Tues

Employee: Clock In/Out; Reviews Timecard; Corrects Errors

Week 2: Wed

Employee: Clock In/Out; Reviews Timecard; Corrects Errors

Supervisor: Reviews Timecards; Approves Corrections; Approves Leave

Week 2: Thurs

Employee: Clock In/Out; Reviews Timecard; Corrects Errors

Org Manager: Reviews Timecards for errors

Week 2: Fri

Employee: Clock In/Out; Approves Timecard

## Payroll Deadline: Mon

Supervisor: Reviews/Approves Timecard

Org Manager: Reviews Timecard for errors; Reviews approval; Final Sign Off

LoboTime Approval Workflow

Represent approval permission by role in LoboTime. It is recommended that departments identify standards for backup approval.

Legend

— Primary Approver

--- Delegate Approval

-·-·- Backup Approval
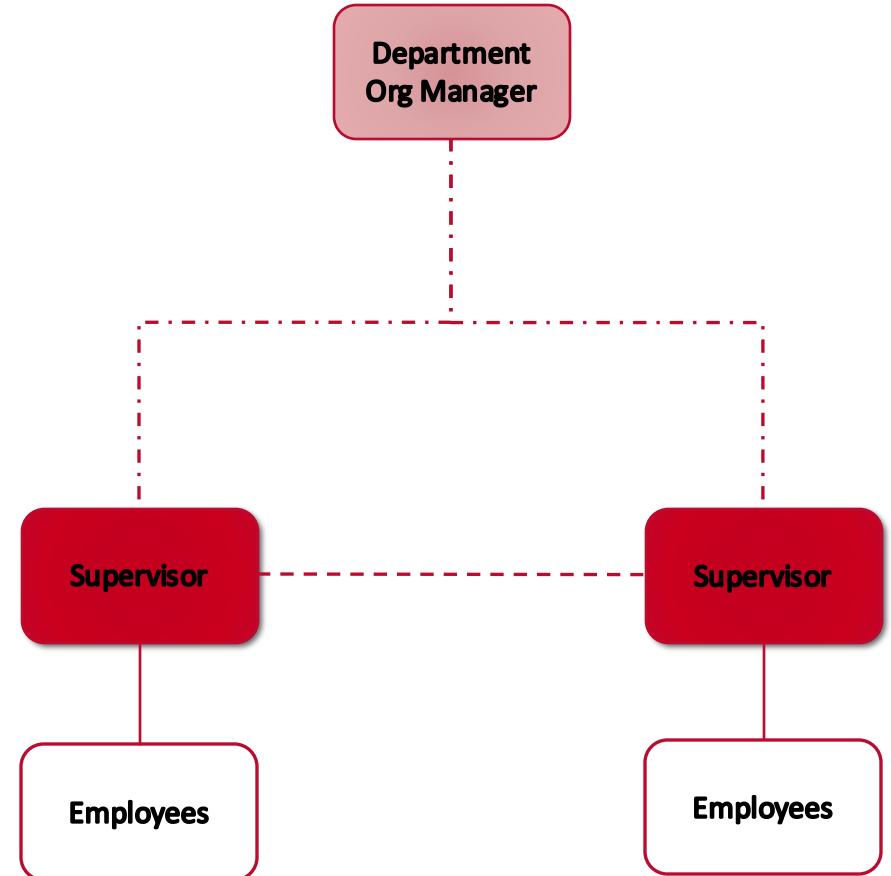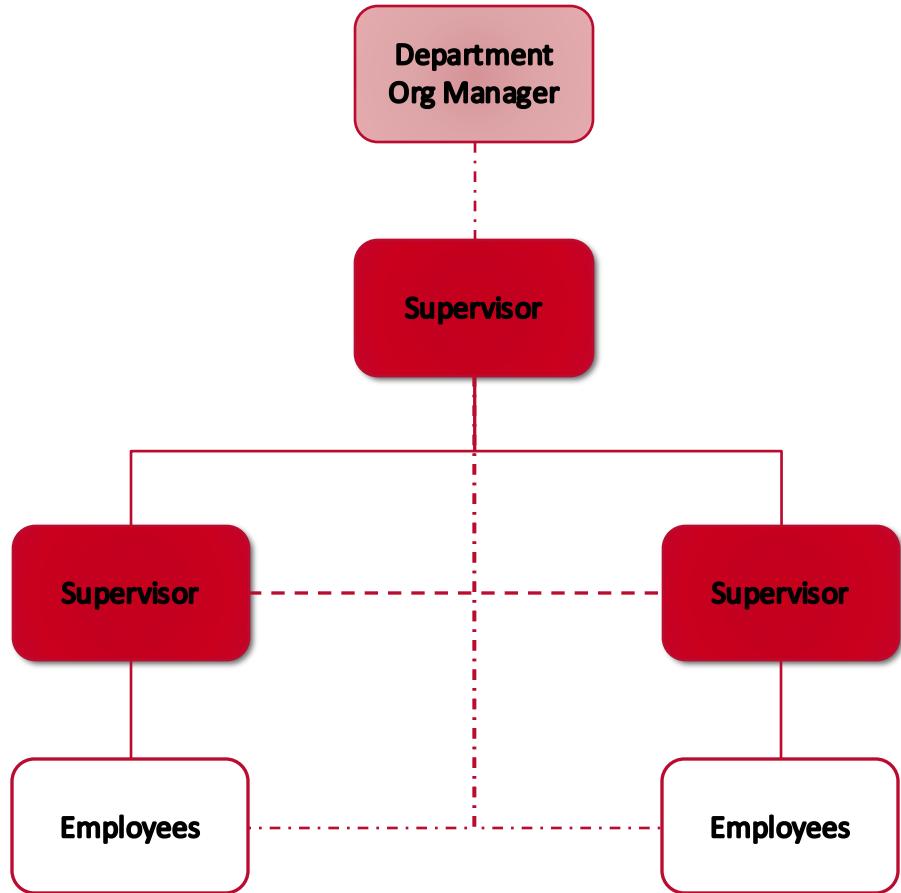
Considerations for Org Managers

Things to consider:
- Number of non-exempt employees
- Complexity of departments work schedules and pay rules
- Employee technical literacy

Department Procedures:
- Expectations for employees to correct punches
- Expectations for supervisors to correct punches and enter complex pay rules
- Expectations on timing to review/correct timecards
- Backup approval structures
- Employee and Supervisor Support

Supervisor Experience

Supervisor Expectations Side-by-Side Comparison	
Current State: PHATIME	Future State: LoboTime
• Ensure employees complete and submit paper timesheets each pay period. • Reviews timesheet for accurate time reporting. • Signs paper timesheet. • Submits paper timesheet to timekeeper for entry into PHATIME.	• Ensure employees complete electronic timesheet in LoboTime. • Reviews timesheet for accurate time reporting. • Approves employee's timesheet in LoboTime.
Standard Expectations	**Standard Expectations**
• **Knowledge:** Understanding of time and leave policies and department procedures. • **Responsibility:** Ensure employees are working assigned work schedule. • **Responsibility:** Hold employees accountable for following University and department time and leave requirements. • **Responsibility:** Review and approve timesheets according to processing deadlines. • **Quality Control:** Ensure employees are recording time worked accurately. • **Support:** Provide training and direction to employees on time and leave requirements.	• **Knowledge:** Understanding of time and leave policies and department procedures. • **Knowledge:** Basic use of LoboTime to clock in/out, request leave, review and approve timesheet. • **Responsibility:** Ensure employees are working assigned work schedule. • **Responsibility:** Hold employees accountable for following University and department time and leave requirements. • **Responsibility:** Review and approve timesheets according to processing deadlines. • **Quality Control:** Ensure employees are recording time worked accurately. • **Support:** Provide training and direction to employees on time and leave requirements.

LoboTime Access	Employee	Supervisor	Org Manager
Level of Access	Self	All subordinate employees	All employees within assigned dept
Punch or enter time for shift start, breaks and shift end	✓	✓	✓
Edit timecards	✓	✓	✓
Request time off	✓	✓	✓
Edit or cancel time-off requests	✓	✓	✓
Approve timecard	✓	✓	✓
Delegate timecard approval		✓	✓
Build/Maintain Schedules		✓	✓
Approve Employee Timecards		✓	✓
Review alerts when employees deviate from the schedule		✓	✓
Run reports and analyze Dataviews		✓	✓
Final sign off of timecards			✓

Supervisor Experience: Common Tasks

- Supervisor Experience
  - General Navigation
  - Non-exempt Employees
    - Navigating a non-exempt timecard
    - Reviewing a missed punch
    - Correcting a punch
    - Approving a timecard
  - Exempt Employees
    - Navigating an exempt timecard
    - Approving a timecard
  - Approving Leave
  - Filtering Employee Lists
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Demonstration

Test Scenarios

- Navigating an exempt and non-exempt timecard

- Approve timecards

What comes next…

Additional Questions and Content Review

- Weekly Recap Email

- Tuesday Phase 2 Drop In Sessions (December 23rd and January 6th)

Phase 2 Training Session 4 January 19th 11:00 – 12:00

- Org Manager Experience
  - Utilizing Reports and Dataviews
  - Monitoring timecard errors
  - Monitoring timecard approvals
  - Approving Employee Timecards (Group & Individual)
  - Signing Off Employee Timecards

Implementation Timeline

December Milestones

- Verifying and Correcting Supervisor Information

- Reviewing and Revising Department Timekeeping Procedures

- Set Expectations for Org Managers

- Communicate Training Expectations to Employees

See Phase 2 Readiness Checklist (https://time.unm.edu/resources/lobotime-phase-2-checklist_final.pdf).

Future Work

Union Scenarios such as standby pay, call back pay, shift differential, etc.

Using and monitoring employee schedules

Faculty supervisor support

Complex Leave Scenarios

Resources

Website: https://time.unm.edu/

Phase 2 Resources (https://time.unm.edu/resources/phase-two-resources.html)
- Implementation Checklist
- Job Aids
- Department Procedure Guides

Phase 2 Drop In Session: Tuesday, December 23rd 11:00 – 12:00

Additional Questions?

CONTACT THE LOBOTIME IMPLEMENTATION TEAM AT TIME@UNM.EDU