

Dayforce Manager Guide

Using DayForce for Approval Activities



Logging into DayForce

URL: <https://dayforcehcm.com>
Login: 6 Digit employee ID #
Password: last 6 digits of SIN #

Navigating DayForce

- 1 My Day** – view pending Time Off Requests, Messages, Pay Approvals, HR Incidents
- 2 My Schedules** – view, create and edit the schedules for your departments
- 3 My Timesheets** – view, edit and approve your team's timesheets
- 4 My HR** – view your teams' HR profiles and balances

Click the black and green square to maximize or minimize the panel you want to see

Check your messages here; to learn how to send a message or broadcast please see Employee Guide

The screenshot displays the Dayforce Manager interface. At the top, there are navigation tabs: Human Resources, My Day, My Schedules, My Timesheets, My HR, My Work, and Me. The 'Time Off Request Manager' panel is active, showing a list of requests. One request for 'Kapoor, Kelly 045514' is selected, and the 'Edit Request' panel is open. The 'Edit Request' panel includes fields for Employee, Primary Location, Reason, Status, All Day, Start Date, End Date, and Total Hours. It also has sections for Employee Comment and Manager Comment, and a Balances table. The Balances table has columns for Type, Unit, Start, End, Accrued, Used, Approved, Pending, Remaining, and Exceeded. Below the table are Shifts and Unfill sections.

Type	Unit	Start	End	Accrued	Used	Approved	Pending	Remaining	Exceeded
Vacation	Hours	10/29/2014		37.5000	0.0000	0.0000	0.0000	37.5000	0.0000

Approving Time Off Requests

- 1** Maximize the Time Off Request Manager Panel
- 2** You can click the green checkmark to approve the request, the red X to deny the request
- 3** Click the pencil icon to view the details of the request (such as the employee's vacation balance and comments). Here you can also add your own comment, explaining why a request was denied for example.
- 4** Once your comments have been added, you can click the green checkmark to approve or the red X to deny the request. To save your comments and respond later, click the disc (Save) icon.
- 5** The employee will be able to see that you have approved or denied their request immediately. If you decide to review their request at a later time, they will see that it is pending.

Under **My Work, Me** and the right most arrow, you will find all of the tools discussed in the Employee Guide Worksheet, as well my **My Reports, Scheduling Setup,** and **Scheduling Plan** will be discussed in detail in enhanced training, and in one on one meetings with clinical units

Questions? Contact us at
dayforce@mtsinai.on.ca

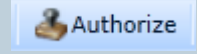
Dayforce

Using DayForce to Approve Time & Pay

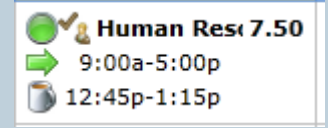
Authorizing Timesheets

The screenshot shows the 'My Timesheets' interface. At the top, there are navigation tabs: Human Resources, My Day, My Schedules, My Timesheets, My HR, and My Work. Below the navigation is a search bar and a date selector set to 2014/10/26. The main area is a calendar grid with columns for Sunday, Oct 26, Monday, Oct 27, Tuesday, Oct 28, Wednesday, Oct 29, and Thursday, Oct 30. Employees listed include Beesly, Pam; Halpert, Jim; Kapoor, Kelly; Martin, Angela; and Schrute, Dwight. An edit pop-up window is open over the Monday, Oct 27 shift for Kelly Kapoor, showing a shift for 'Human Resources' from 9:00a to 12:45p. The pop-up includes a dropdown for 'Human Resources', a dropdown for '[None]', and time selection buttons for 9:00a, 12:45p, 1:15p, and 5:00p. There is also a 'Totals' section showing 7.50 hours and an 'Enter Comment Here' field.

- 1 Navigate to **My Timesheets** in your DayForce navigation bar
- 2 Select the week you need to approve from the calendar icon, and then click **Load** to view the timesheets
- 3 If there is a timesheet that you need to edit, you will hover over the shift until the icon appears. Click the icon to open the shift, and edit the time, paycode: or other shift details
- 4 Click outside the Edit Shift Time box to see the changes reflected in the week view
- 5 To approve time, simply highlight the shift, day or week (seen to the left) and click the authorize icon:



- 5 After approval, the green circle will show a checkmark to indicate that it has been authorized:



- 6 Hit the save button to save your timesheet approvals:



Approving Pay

To finish off, managers will review the pay period and approve it so that the Payroll Administrator knows it is ready to be included in payroll.

The **Pay Approve Checklist** is located in **My Day**. It helps to organize the close out pay process by listing the pay periods that are due or overdue for approval for your location.

This should be done after the pay period is over, but before the deadline to submit to payroll:

- 1 Navigate to **My Day** and maximize the **Pay Approve Checklist** Panel
- 2 Check the status of each department under you to ensure that there are no outstanding authorizations or exceptions to deal with
- 3 If there are, you can click on the pencil icon to go directly to the timesheets in question to make corrections or to authorize
- 4 Once you are sure that every timesheet is correct, check the checkbox at the end of the row and click save to submit to payroll

The screenshot shows the 'Pay Approve Checklist' interface. At the top, there is a date range selector for 'Period of: 10/27/2014 - 11/10/2014'. Below this is a table with columns: Status, Manager, Organization, Pay Group, Start, End, Due Date. A single row is visible with a yellow background, showing 'Human Resources' as the organization and 'MSH-Biweekly' as the pay group. At the bottom of the table, there are icons for 'Edit', 'Report', and 'Message'.

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Using Dayforce to Delegate and View Balances

Delegation of Authority

When you are away on vacation or unable to complete your timesheet approvals, you will need to delegate your authority to someone at your level of management or higher in order to ensure that your employees are approved, and therefore paid correctly.

The screenshot shows the 'Me - Delegation' page in Dayforce. A blue box highlights the 'Me' tab in the navigation bar. A red box highlights the 'New' button. A red box highlights the 'Employee' field in the 'Choose Employee' dialog. A red box highlights the 'Effective From' and 'Effective Until' date fields. A red box highlights the 'Save' button. A red box highlights the 'Delegation' option in the 'Me' dropdown menu.

- 1 Navigate to the Me tab in your DayForce navigation bar
- 2 Select Delegation from the drop-down menu
- 3 Click **New** to initiate a new delegation
- 4 Select the head icon to bring up the Choose Employee menu. Type in the name of the employee you will be delegating to, and click apply filter.
- 5 Click on the name of the employee
- 6 Select the Effective From and Effective Until dates
- 7 Click save to submit your delegation. This person will now have the option to log in as you when they enter DayForce

Quick Tip:
It is important to hit save after everything you do in DayForce, and refresh to confirm that your changes have been saved.

Viewing Employee Balances

The screenshot shows the 'My HR' page in Dayforce. A red box highlights the 'My HR' tab in the navigation bar. A red box highlights the 'Address Book' button. A red box highlights the 'Filter' button. A red box highlights the 'Balance and Attendance' section. A red box highlights the 'Balance Information' table. A red box highlights the 'Attendance Information' chart.

Viewing Employee Balances

- 1 Navigate to **My HR** in your DayForce navigation bar
- 2 Select **Address Book** to view the list of employees in your area; select the employee whose balance you need to view. You may also select **Filter** to search by name, job or other characteristics
- 3 This will open the **Employee Profile**. In this screen, on the bottom left hand side, you will be able to view **Balance Information** for the employee to inform scheduling and vacation decisions

Here you can also view contact and position information for the employee.

Type	Unit	Accrued	Remaining	Exceeded
Vacation	Hours	37.5000	37.5000	0.0000

Attendance Information: Absent (Bar chart showing 70 hours)

