PALOMAR HEALTH
Medical Group

API for Timekeepers

Resource Guide

API Time and Attendance

The API Time & Attendance application is used to electronically clock in and out for each shift and lunch breaks. Employees will submit PTO requests, view their PTO/PSL balances, enter special pay codes, change their cost center and/or job class, and modify their timecards as it relates to their position. As a Timekeeper, your primary role will depend on your access level. If you are an **Editor**, your primary role will be to **edit** timecards. If you are an **Approver**, your primary role will be to approve timecards. It is best practice to monitor your staffs' timecards on a regular basis to help payroll processing run as smooth as possible.

Your Home Screen

This default page is a great place to access key features of the system!

1. View your **Unread Messages** individually or all at once
2. View your **Pending Requests** from your employees
3. View your **Critical Exceptions** with one click!

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Logout

Home | Quick Badge | Employee | Reports | Actions | Preferences | Help

Good Morning, Timekeeper

⌄ My Announcements (1)

Importance	Announcement
❗	Welcome to API Time and Attendance. Should you need assistance, please reach out to your Timekeeper or call the PHMG Help Desk at (760) 291-6924. Thank you.

1 ⌄ My Unread Messages (8)

	Priority	Severity	Attachment	From	Subject		Date
📇		ⓘ		System Account	Employee Calendar Request Submitted For RN Test		12/24/2021 10:06
📇		ⓘ		System Account	Employee Clocking Request Submitted For RN Test		12/24/2021 10:05
📇		ⓘ		System Account	Employee Clocking Request Submitted For PA Test		12/24/2021 10:01
📇		ⓘ		System Account	Employee Calendar Request Submitted For PA Test		12/24/2021 10:00
📇		ⓘ		System Account	Employee Calendar Request Submitted For NP Test		12/24/2021 09:58

...more...

Add Message	View Messages

> My Transaction Requests
> My Calendar - Month View
⌄ My Bookmarks

Bookmarks
4 Employee Search
Employee LaborView

2 ⌄ **Employee Pending Requests**

■ Calendar - 3
■ Clocking - 2
■ Adjustment - 0

Choose a Pay Group Instance:
All Current

⌄ **Employees With Exceptions Counts**

3
■ Critical - 2
■ Warning - 0
■ Handled Warnings - 1
■ Informational - 3
■ Handled Informationals - 0
■ Pending - 0
■ Nothing - 0

Choose a Pay Group Instance:
All Current

💡 **ProTip**... **My Bookmarks** holds all of your shortcuts...fewer clicks! Yes!

• Search for your employees individually **(Employee Search)**
• See your Direct Reports, Sign-Off or Approve timecards **(Employee LaborView)**

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My Unread Messages

All employee *Calendar Requests* and *Clocking Requests* will appear in **My Unread Messages**. You will also be notified via email.

1. Start from your **Home** screen
2. Open your **My Unread Messages** section
3. View your unread message details individually
4. View all available messages

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1 Home | Quick Badge | Employee | Reports | Actions | Preferences | Help

Good Morning, Approving Timekeeper

⌄ My Announcements (1)

Importance	Announcement
❗	Welcome to API Time and Attendance. Should you need assistance, please reach out to your Timekeeper or call the PHMG Help Desk at (760) 291-6924.
	Thank you.

2 ⌄ My Unread Messages (40)

	Priority	Severity	Attachment	From	Subject	Date
3 📋		ⓘ		System Account	Employee Calendar Request Submitted For RN Test	12/24/2021 10:06
📋		ⓘ		System Account	Employee Clocking Request Submitted For RN Test	12/24/2021 10:05
📋		ⓘ		System Account	Employee Clocking Request Submitted For PA Test	12/24/2021 10:01
📋		ⓘ		System Account	Employee Calendar Request Submitted For PA Test	12/24/2021 10:00
📋		ⓘ		System Account	Employee Calendar Request Submitted For NP Test	12/24/2021 09:58

...more...

Add Messa**4** | View Messages

> My Transaction Requests (1)
> My Calendar - Month View
> My Bookmarks

Your messages will fill up quickly. It is a smart move to delete them on a regular basis after reviewing them.

1. Select all messages at once
2. View the specifics of an individual message
3. Delete all of your selected messages

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Logout

Home | Quick Badge | Employee | Reports | Actions | Preferences | Help

> Filter Criteria

Actions

Mark As Read | New Message
3 Delete Selected
Mark As Unread

Bookmarks
Add
Bookmarks
Employee Search
Employee LaborView

Report Favorites
Report Favorites do not exist.

1 ☑ | Priority | Severity | Attachment | Status⌃ | From | Subject | When Created | **2** ⌄

☑ | | | | | System Account | Employee Calendar Request Submitted For RN Test | 12/24/2021 10:06 | ⌄

The following request to add a transaction has been submitted.
Requested By: RN TestRequested On: 12/24/2021 at 10:06
Date: 12/21/2021Time: 08:00Hours: 8.00Pay Code: PTOS - PHMG SCHEDULED PTO
Facility : 7 - PHMGCost Center : 63-61-1700 - Internal Med_GB-ClnJob Class: 5360 - RN I (FR)
****

☑ | | ⓘ | | | System Account | Employee Clocking Request Submitted For RN Test | 12/24/2021 10:05 | ⌄

The following request to add a transaction has been submitted.
Requested By: RN TestRequested On: 12/24/2021 at 10:05Reason: Forgot to clock in
Date: 12/20/2021Time: 08:00
Facility : 7 - PHMGCost Center : 63-61-1700 - Internal Med_GB-ClnJob Class: 5360 - RN I (FR)
****

☑		ⓘ	📄		System Account	Employee Clocking Request Submitted For PA Test	12/24/2021 10:01	›
☑		ⓘ	📄		System Account	Employee Calendar Request Submitted For PA Test	12/24/2021 10:00	›
☑		ⓘ	📄		System Account	Employee Calendar Request Submitted For NP Test	12/24/2021 09:58	›
☑		ⓘ	📄		System Account	Employee Calendar Request Submitted For PD Test	12/24/2021 09:52	›
☑		ⓘ	📄		System Account	Employee Clocking Request Submitted For PD Test	12/24/2021 09:51	›
☑		ⓘ	📄		System Account	Employee Clocking Request Submitted For RN Test	12/21/2021 13:14	›
☑		ⓘ	📄		System Account	Employee Calendar Request Submitted For NP Test	12/16/2021 12:45	›
☑		ⓘ	📄		System Account	Employee Clocking Request Submitted For PD Test	12/16/2021 12:42	›

<<Previous Set <Previous Page **1** 2 3 4 Next Page> Next Set>>

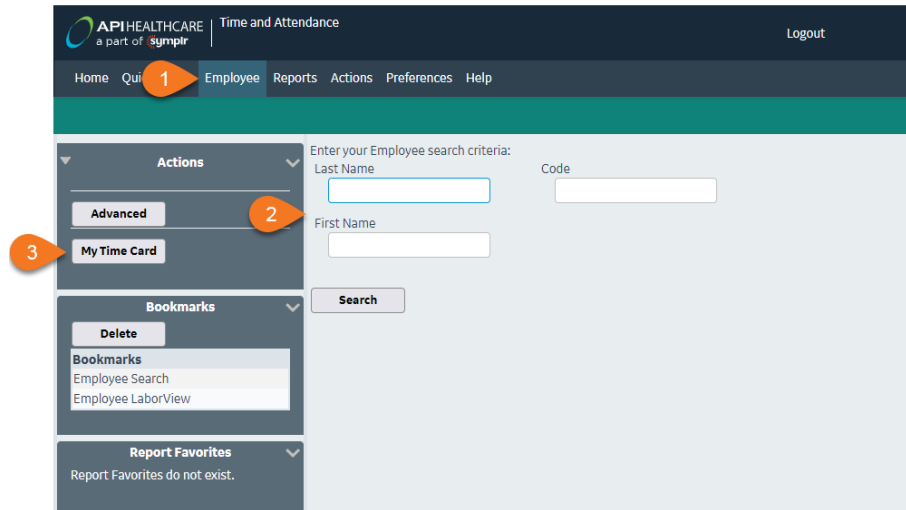PALOMAR
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Searching for Direct Reports

Employee Search

You can search for an employee to view their time card, in multiple ways.

1. Select **Employee** from your toolbar
2. Search by **Last Name**, **First Name**, **Code** (PHMG ID #) or any combination
3. Select the **My Time Card** shortcut to review your time card

View Your Direct Reports

View a list of all of your Direct Reports in one place. Validate the accuracy of the list of employee names.

1. Select **Actions** from your toolbar
2. Select **Employee LaborView**
3. Or Select **Employee LaborView** from the **Bookmarks** shortcut
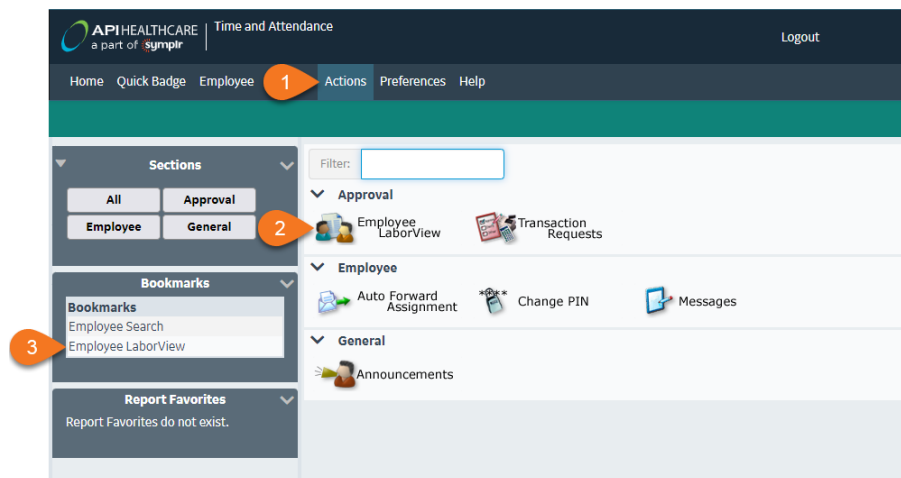
Take a Tour of the Time Card Screen (TCS)

This screen displays a ton of information all in one location!

1. Current Pay Period displays by default (view the previous and next pay period from the drop down menu)
2. View your own Time Card or Search for an Employee
3. Approve, Delete or Deny a Time Card Request
4. Enter Clocking and Calendar entries
5. Refresh the screen after making an entry
6. Approve the current Time Card (or UnApprove an Approved Time Card)
7. Search for an employee or view all direct reports
8. Time Card Entries for the current pay period
9. View all Benefit Balances (see ProTip)
10. Employee Information from Lawson
11. View employee's home Cost Center, Job Class, etc…
12. View all hours that will be paid to the employee, distributed by week, for the pay period displayed

ProTip… The **Benefit Balances** section displays the beginning and ending balances for all the benefit categories assigned to you.

- View the details of PTO taken, PTO submitted for the current pay period and for year to date totals of available PTO.

Employee LaborView

This is the best location to see more timecard details for your direct reports, all in one spot! After all timecards have been edited and verified for accuracy, you can **Approve** or **Sign-Off** on all of them at once (or multiple at a time) from this screen. You can also open and review individual time cards or multiple time cards in succession.

> **ProTip**... Your employee list can be sorted by each column. Select an individual employee, more than one employee or select all employees by checking the box in the top row! Yes!

- **Approve** the selected Time Cards (if you are an Approver)
- **Sign Off** the selected Time Cards (if you are an Editor)
- **Filter** your employee list
- **Open** an employee's Time Card (or open many if multiple employees are checked)

Approving Requests

Once you open an employee's (or multiple employees') timecard, the most current pay period will display. All of the **Add Calendar** requests (PTO, Bereavement, Jury Duty) and **Add Clocking** requests (missed clocking edits, corrected pay codes, facility code modifications, etc...) will display on the **Transactions (List)**.

- Review the first employee's requests
- Check the box next to each **Calendar** request
- Click **Approve Selected**
- Select **Calc Me Now ...** continue to the next employee's timecard

> **ProTip**... If **Denying a Clocking Request** that has a corresponding clock in/out punch, both clockings should be denied to avoid incorrect system calculations due to a missed punch.

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Editing Existing Requests

Each request contains additional options from its own drop down menu. The menu contains tabs that allow for modification. The **General** tab, displays all of the pertinent information relating to the specific request (Date, Pay Code, Cost Center, Job Class, Hours, etc…). To modify the request on your employee's behalf, open this section and enter the applicable adjustments.

The **Notes** tab, is where you enter your notes. All notes can be seen by the employee and are discoverable when running reports or performing audits. The subject line and notes that you enter, should be pertinent to the specific transaction that you are editing and are used to help tell the story behind your modifications, denials and approvals (if applicable). Remember to select **Calc Me Now** after making any adjustments to the timecard.

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Time Card Edits

Adding a Request on Your Employee's Behalf

It is best practice to have your employees enter their own **Clocking** edits (correcting their timecard, adding missed clockings, etc...) and **Calendar** entries (PTO, Bereavement, Jury Duty). When this is not possible, a Timekeeper may enter these requests on the employee's behalf. Remember, you can do anything to your employee's timecard that your employee can do. So... keep it simple!

Calendar Entries

Add a **Calendar** entry for your employee. Enter in all of the pertinent information (if applicable... leave Cost Center and Job Code blank if the employee is working in their home cost center or main job class) and select **Calc Me Now**.

*ProTip... It's a good idea to add a **Note** when modifying an employee's timecard. Use the **Notes** tab.*

Clocking Entries

Add a **Clocking** entry for your employee. Enter in all of the pertinent information (if applicable) and select **Calc Me Now**.

*ProTip... It's a good idea to add a **Note** when modifying an employee's timecard. Use the **Notes** tab.*

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Before Approving Timecards

- All **Critical Exceptions** must be cleared in order to process payroll
- All **Time Edits** should be completed
- **Calendar** and **Clocking Requests** should be **Approved or Denied** (or entered by you on your employee's behalf if necessary)
- Review the employee's **Pay Distributions** (represents the hours that will pass over to Lawson and be paid to the employee)
- It is best practice to have your **Employees Sign - Off** on their timecards prior to approving

Approve from Employee Time Card Screen

The ✅ symbol next to the employee's id indicates the employee has been approved.

Approve from Employee LaborView

Go to **Actions** and select **Employee LaborView** or Go to **Bookmarks** and select **Employee LaborView.**
Approve one time card at a time or multiple at once by selecting the appropriate checkbox.

Report Basics

The **Reports** section displays the reports available within the API Time and Attendance application.

Tips for Running Reports

- To run a report, click the open folder symbol next to the one you want.
- Enter criteria to meet your report needs, specifically selecting only the necessary departments.
- The **Change Parameters** button is located in the left pane **after** the results display and allows you to change the criteria you ran the report for.
- You can export the report results using the options in the left pane.

Common Reports

- Supervisor Hours by Pay Code
  - ✔ Reports **>** Time and Attendance **>** Supervisor Hours by Pay Code
  - ✔ Displays employee hours for a specified pay code
- TCR Archive
  - ✔ Reports Audit **>** TCR Archive
  - ✔ Displays employee time card information for a specific pay range (allowing supervisors to view and export information from a previous pay period)
  - ✔ Can only be ran in 8 week increments at a time
- Supervisor Employee Note History
  - ✔ Displays a list of notes for a specified employee and timeframe
- Supervisor Charge Back Non-Home Employee Detail
  - ✔ Reports **>** Supervisor **>** Supervisor Charge Back Non-Home Employee Detail
  - ✔ Displays the hours charged to the department for non-home labor distribution employees who worked in that department during a specified date range
- Supervisor Critical Exceptions
  - ✔ Lists employees that have critical exceptions on their time card
  - ✔ Critical Exceptions MUST be cleared in order to process payroll
- Supervisor Exceptions Report
  - ✔ Lists employees that have warning exceptions on their time card
  - ✔ Exceptions should be reviewed and cleared prior to approving timecards
- Supervisor Employee Listing
  - ✔ Displays list of employees based on specified parameters (ie. Status, Cost Center)
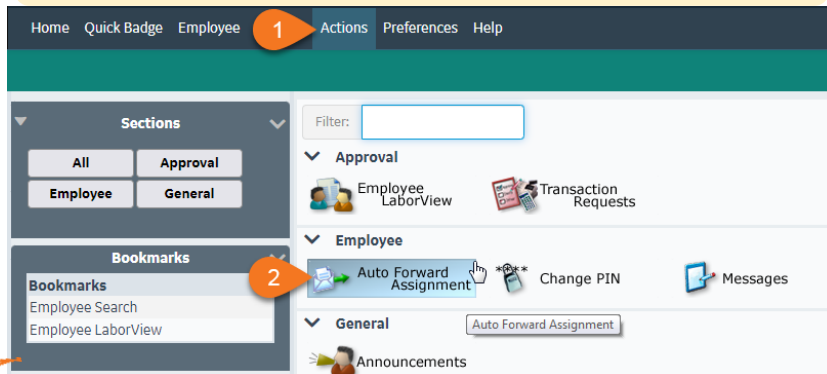
Auto-Forwarding Time Cards
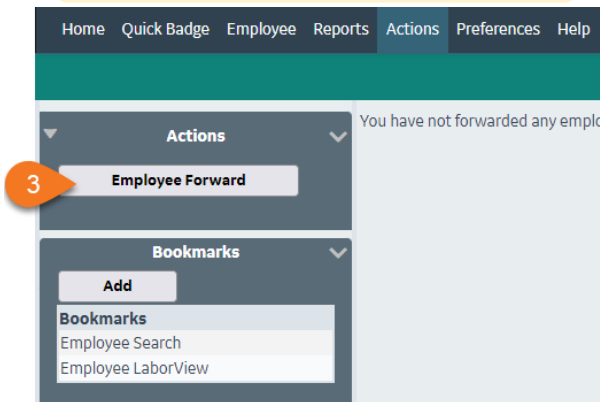
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Forward Your Employees to Another Timekeeper

If you are going on PTO or will be out of the office for a while, you can forward your employees to another Timekeeper, to edit and approve their timecards. You can forward all of your employees to one supervisor or divide your employees among multiple supervisors. If you are forwarding timecards to an employee that reports to you, you will need to forward their timecard to someone else, as employees cannot approve their own timecards.
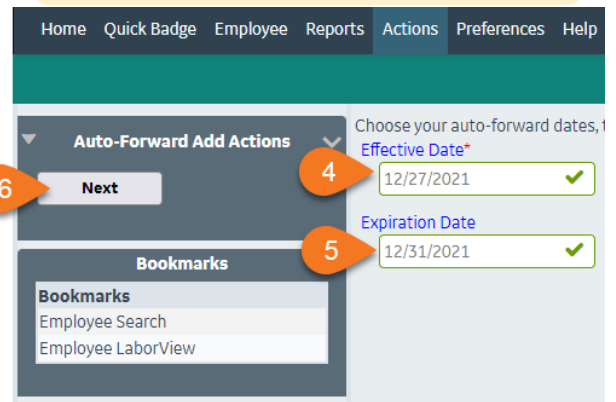
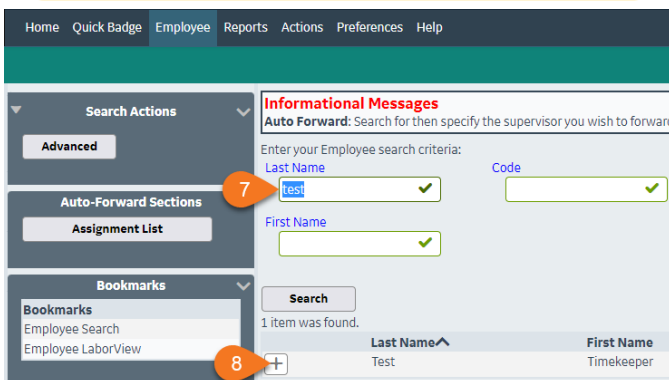### Select **Actions** from your Toolbar and **Auto Forward Assignment**

Home   Quick Badge   Employee   **1** Actions   Preferences   Help

Sections
All   Approval
Employee   General

Filter:

Approval
Employee LaborView   Transaction Requests

Employee
2 Auto Forward Assignment   Change PIN   Messages

Bookmarks
Bookmarks
Employee Search
Employee LaborView

General   Auto Forward Assignment
Announcements

Select **Employee Forward**

Home   Quick Badge   Employee   Reports   Actions   Preferences   Help

Actions
3 Employee Forward

You have not forwarded any empl

Bookmarks
Add
Bookmarks
Employee Search
Employee LaborView

Enter the **Effective Dates** and click **Next**

Home   Quick Badge   Employee   Reports   Actions   Preferences   Help

Auto-Forward Add Actions
6 Next

Choose your auto-forward dates,
Effective Date*
4 12/27/2021 ✓

Expiration Date
5 12/31/2021 ✓

Bookmarks
Bookmarks
Employee Search
Employee LaborView

Search for the **Timekeeper** that you will forward your employees to

Home   Quick Badge   Employee   Reports   Actions   Preferences   Help

Search Actions
Advanced

Informational Messages
Auto Forward: Search for then specify the supervisor you wish to forward
Enter your Employee search criteria:
Last Name   Code
7 test ✓   ✓
First Name
✓

Auto-Forward Sections
Assignment List

Bookmarks
Bookmarks
Employee Search
Employee LaborView

Search
1 item was found.

Last Name   First Name
8 + Test   Timekeeper

Select the employees that you want to forward to this **Timekeeper** and click **Forward Selected**

Home   Quick Badge   Employee   Reports   Actions   Preferences   Help

Auto-Forward Add Actions
10 Forward Selected

Informational Messages
Employee Selection: Selecting Employees to forward to
Choose the employees to auto-forward to Timekeeper Tes

Bookmarks
Bookmarks
Employee Search
Employee LaborView

9   Last Name ⌄
☑
☑   Test
☑   Test
☑   Test
☑   Test
☑   Test
☑   Test

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