

# careerpathservices

## Microix – Host Site Supervisor Guide

### FINDING MICROIX

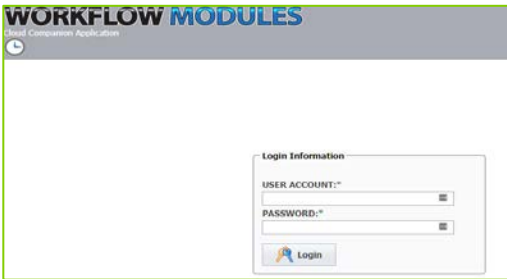
<https://microix.emailcareerpathservices.org/MicroixCloud/>

If you get a Certificate Warning when accessing Microix DO **NOT** click "OK". Click CANCEL.

### FIRST TIME LOGIN ONLY

**USERNAME:** Your username is your **First Name Last Name** case, does not matter - (*Sally Smith*).

**PASSWORD:** First time logging in your password is your **last name**, all lower case. The system will prompt you to select a new password.

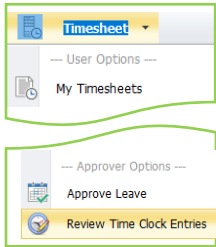


Note regarding Password Resets: a password reset email is sent to the Program Technician who will forward it to the Host Site Supervisor.

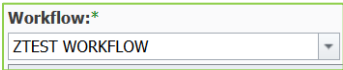
### REVIEWING TIME ENTRIES AND TIMESHEETS

Host Site Supervisors can view Clock In/Clock Out punches for the pay period.

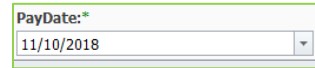
**Step 1:** Select **Review Time Clock Entries** from the Timesheets menu



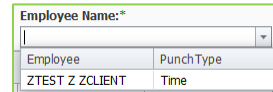
**Step 2:** Select the client's Workflow



**Step 3:** Select the appropriate PayDate




**Step 4:** Select the client's name



The time punches for the pay period will display.

Week	Date	#	LineId	PunchBy	ChargeID	Type	Date	Time	HH:MM	ElapsedTime	SysTime	
Week: Wednesday, October 24, 2018												
			196	CPU	ZCEW-BLC	IN	10/24/2018	9:07:00 AM	2:05	2.08	10/24/2018 09:07 AM	
			201	CPU		OUT	10/24/2018	11:12:00 AM	0:00	0	10/24/2018 11:12 AM	
										Sum=	2.08	
Date: Thursday, October 25, 2018												
			214	CPU	ZCEW-BLC	IN	10/25/2018	2:42:00 PM	0:00	0	10/25/2018 02:41 PM	
										Sum=	0	
										Sum=	2.08	
										Sum=	2.08	

The Host Site Supervisor, Program Tech/Analyst, or Practitioner can also **Edit** or **Add** a punch from this screen, so long as a timesheet or preliminary timesheet has not been created

Click the **Print** icon  to display a downloadable report.

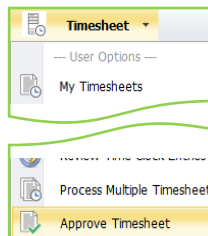
Click the **Close** icon  to exit or use the **Timesheet** menu  to access another area.

## APPROVING TIMESHEETS

No data will display until the client submits their timesheet.

After client submits timesheet, the Host Site Supervisor can approve. In the event the Host Site Supervisor is unavailable to approve the timesheet, the Program Technician/Analyst or Practitioner can approve.

**Step 1:** Select **Approve Timesheet** from the Timesheets menu.

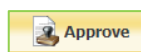


**Step 2:** Select employee. Click **Edit** to review the timesheet.

ZTEST Z ZCLIENT	CMJOB	2.48	1	3.48
Count=1		Sum=2.48	Sum=1	Sum=3.48

Below the table are two buttons: 'Edit' (highlighted with a red box) and 'Approve'.

**Step 3:** Review timesheet, click **Close**  then click **Approve**.



### Client Did Not Enter All of Their Time on Submitted Timesheet:

\*In the event the client was unable to enter all of their time, the Practitioner, Program Technician/Analyst or Host Site Supervisor can add time on behalf of the client.

Follow Steps 1 and 2 above.

In the Edit screen, click **Add**



The **PayType**, **PayCode**, and **Charge Code** will populate.

Add the appropriate date, then add the **Time In** and **Time OUT**. Hours field will auto-calculate. Be sure to use the correct AM/PM. Add **Notes** if necessary.

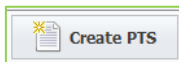
PayType	PayCode	Charge Code	Date	WeekDay	Time IN	Time OUT	Hours	Shift Variance	Orig. Hrs.	Notes
Update Cancel	Earnings	WCMJO	zCJEW-BLC	11/29/20	08:00 A	01:00 PM	5			

Click **Update**  when complete.

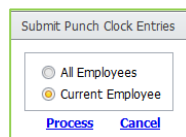
### Client Did Not Submit Timesheet:

\*If client is unable to submit their timesheet, the Practitioner, Program Technician/Analyst or Host Site Supervisor can create a "Preliminary Timesheet" from the **Review Time Clock Entries** page (see above) then approve.

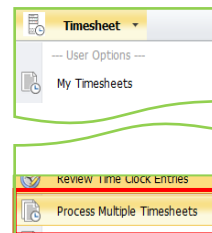
**Step 1:** Click the **Create PTS** icon



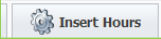
**Step 2:** Select the **Current Employee** and click **Process**

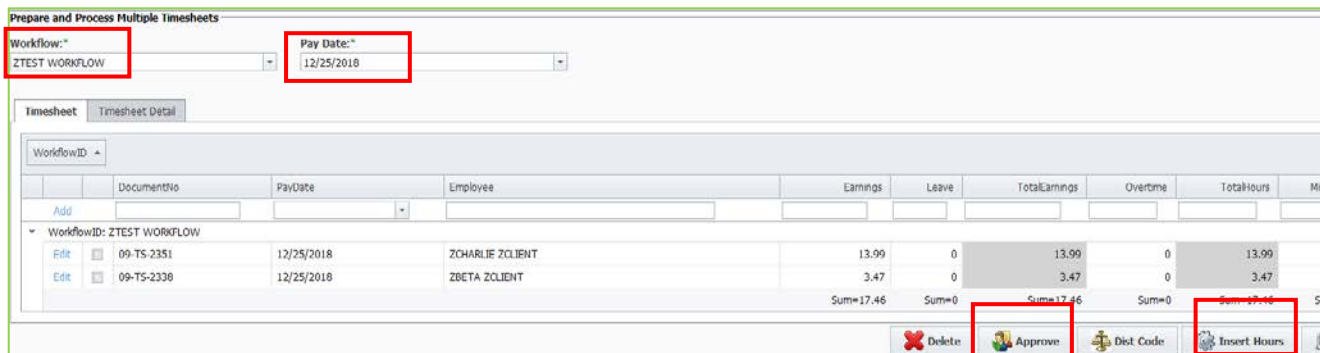


**Step 3:** Select **Process Multiple Timesheets** from the Timesheets menu




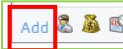
**Step 4:** Select the appropriate **Workflow** and **Pay Date**,

Select the employee's name, then select **Approve**. However, if you need to add additional hours to the timesheet (client missed punches), then select **Insert Hours**  to ensure all time punches have been added to the timesheet.



Need to Add Time to Client's Unsubmitted Timesheet:

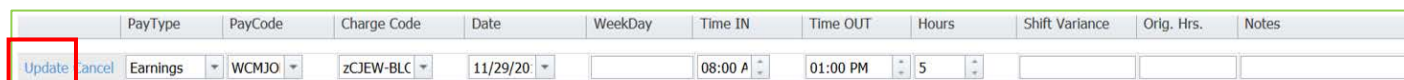
\*If you need to add additional time for the employee, click the Edit  button before from the previous Step 4.

On the next screen, click the Add  button.

The **PayType**, **PayCode**, and **Charge Code** will populate.

Add the appropriate date, then add the **Time In** and **Time OUT**. Hours field will auto-calculate. Be sure to use the correct AM/PM. Add **Notes** if necessary.

Click **Update**.



\*Note: A timesheet cannot be approved until leave is approved. Please contact the Practitioner or Program Technician/Analyst to ensure leave has been approved.

Holidays

The Program Technician/Analyst will manually add holidays to the timesheet for those holiday-eligible clients.

## REPORTS

To view individual client time punches during the pay period (timecard not yet submitted):

- **Timesheet** menu>**Review Time Clock Entries**
- Select appropriate Workflow, PayDate and Employee Name. Time punches will display.
- Select **Print** to display downloadable report. Click **Open with**, then **OK**.

To view individual client punches during any pay period and summary of hours:

**Timesheet** menu>**Reports**

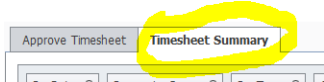
- In **Report Name** dropdown, select **Time Clock Entries**. Select pay period dates (1-15 or 16-31), click **Find**.
- A pivot table report displays client clock ins/outs and daily summaries. You can click and drag headers around. For example, if you don't like the "Week" item at the beginning, click and drag it to the right of the Notes field (or anywhere you want).
- Click **Print** (at the top) to view/download report. Click **Open with**, then **OK**.

To view client timesheets **after** client submits for approval

\*This report shows time punches after timesheet has been created.

- **Timesheet** menu>**Approve Timesheets**. The **Approve Timesheet** tab displays with Workflows assigned to Program Tech/Practitioner.
- Client totals and Workflow totals will display in a *non-customizable* view. Click **Print** to view a downloadable report. You can also click on the individual timesheet, then select **Edit** to review.
- The **Timesheet Summary** report tab is very useful and shows time entered for days in current pay period. Easy to check which days are missing entries.

- Select the **Timesheet Summary** tab (to the right of the Approve Timesheet tab)



to view client and Workflow totals in pivot table format (*customizable*). Move field buttons around to display the data you need.

- View all clients or filter for certain clients. Sort the table from any of the option boxes (InputDate Employee, etc.) by selecting and dragging it to the table area. In this screen you can also sort by:
  - Hours
  - Entrydate (work date)
  - Paydate
  - Paycode

There are multiple ways to manipulate this table to help tracking. The Employee box displays employees first and last name in one field. You can use the Last Name and First Name boxes to display employees' first and last names separately.

- Click **Print** to display a downloadable report. Click **Open with**, then **OK**.

**DETERMINING TIMESHEET STATUSES:**

From the Timesheets menu, select Document Search. A list of staff timesheets assigned to the manager appears:

DocType	DocumentNo	Date	UserName	Payroll ID	Document Description	Workflow	PayDate	Processing Group	Date Submitted	Date Approved
<b>Document Status: 0 - Employee Documents</b>										
TSH	TSH-To Be Assigned	9/5/2018	JOSHUA S NESTOSS	1290	TimeSheet for paydate 09/20/2018	IT MANAGER	9/20/2018	EMPFT		
TSH	TSH-To Be Assigned	9/4/2018	REINA BOELL	1375	TimeSheet for paydate 09/20/2018	IT MANAGER	9/20/2018	EMPFT		
TSH	09-TS-1575	9/4/2018	TRINA L MIRABAL	1078	TimeSheet for paydate 09/20/2018	IT MANAGER	9/20/2018	EMPFT		
3										
<b>Document Status: 14 - Documents Transferred to Abila (Continued on the next page)</b>										
TSH	09-TS-1525	8/29/2018	REINA BOELL	1375	TimeSheet for paydate 09/05/2018	IT MANAGER	9/5/2018	EMPFT	8/30/2018	8/30/2018
TSH	09-TS-1518	8/21/2018	JOSHUA S NESTOSS	1290	TimeSheet for paydate 09/05/2018	IT MANAGER	9/5/2018	EMPFT	8/30/2018	8/30/2018
TSH	09-TS-1460	8/16/2018	TRINA L MIRABAL	1078	TimeSheet for paydate 09/05/2018	IT MANAGER	9/5/2018	EMPFT	8/30/2018	8/30/2018

The following "Document Status" categories may appear. These categories indicate the current status of each timesheet.

**Status 0 - Employee Documents** lists timesheets that are in the employee's "possession". Employees can make updates to their own timecards in this status.

**Status 1 - Practitioner Documents** lists timesheets that have been submitted by the employee for Practitioner/Program Tech approval. Employee can no longer update.

**Status 2 – Program Tech Documents** lists timesheets that have been approved by Site Supervisor for Program Tech/Analyst approval. Employee and Site Supervisor can no longer update.

**Status 7- Site Supervisor Documents** lists timesheets that have been submitted by the employee for Site Supervisor approval. Employee can no longer update.

**Status 11 - Fiscal Documents** lists timesheets that payroll is reviewing for processing. Employee/Site Supervisor/Prgm Tech/Prac/Analyst can not update in this status.

**Status 14 - Documents transferred to Abila** lists timesheets that have been processed by payroll. These can no longer be updated.

## FAQ's

**Q: Who can approve timesheets?**

A: Once the client has submitted their timesheet for approval, the Host Site Supervisor will approve. The timesheet is then routed to the Program Technician/Analyst. If the Host Site Supervisor is unavailable, the Practitioner and/or Program Technician/Analyst can approve the timesheet.

**Q: A client called out sick, what should be recorded on the timesheet?**

A: If the client has sick leave accrued and has met the 90 day waiting period requirement, the client will need to submit a Leave Request for Practitioner approval. Once approved, the client can add it to their timesheet at the end of the pay period. If the client has no sick leave accrued or has not met the 90 day waiting period, the client will do nothing.

**Q: A client submits a leave request, who is notified?**

A: The Program Technician/Analyst receives an email notification and forwards the request to the Practitioner for approval. In the even the Practitioner is unable to approve the leave request, the Program Technician/Analyst can approve.

**Q: The client requested 2 hours of leave, but ended up only taking 1 hour. The timesheet still shows 2 hours.**

A: The Practitioner and/or Program Technician must manually edit and update the item on the timesheet.

**Q: How do I know if the client is eligible to use sick leave?**

A: The Sick Leave Policy states clients must wait 90 days while employed to use sick leave. The Practitioner and/or Program Technician/Analyst will need to determine if the client has worked 90 days. If the client is not receiving a paycheck, it's not considered work time.

**Q: Can I enter information in Microix from anywhere?**

A: Yes. Because the program is web-based, you can enter information from anywhere you have web access. You may use smart phones and tablets, as well as a laptop or desktop computer.

**For additional information on Microix time or leave entry, please contact your Program Technician/Practitioner.**