Costpoint

Timesheet Entry Guide

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Step-by-Step Login Process

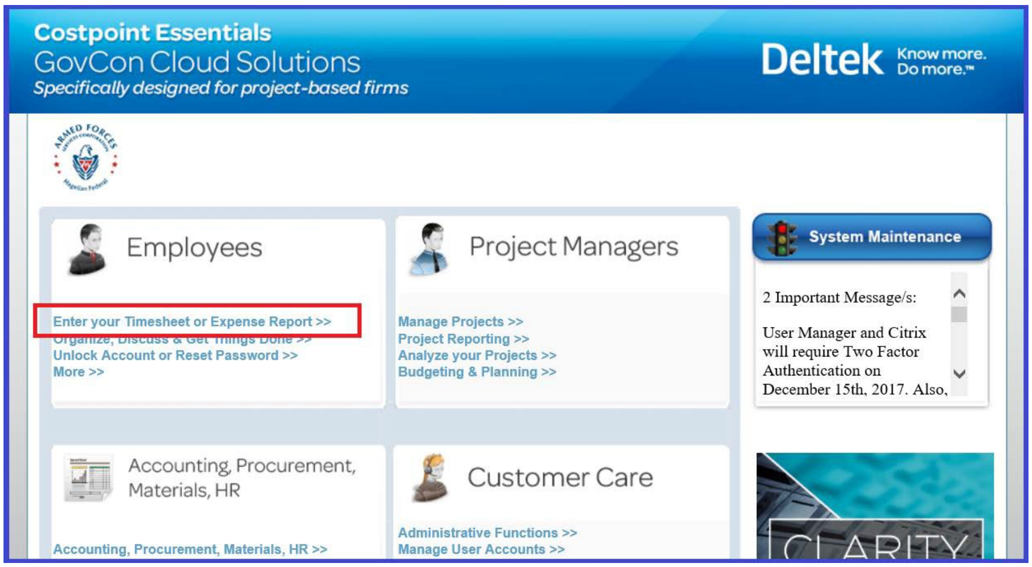
The following guide will walk you through how to access the Time & Expense system and how to complete your timesheet.

Step 1: Logging in to the Time & Expense System

Use the following URL to access the Time & Expense system:

https://www.deltekenterprise.com/MAGELLANHEALTH/portal.html

Step 2: Accessing Time & Expense

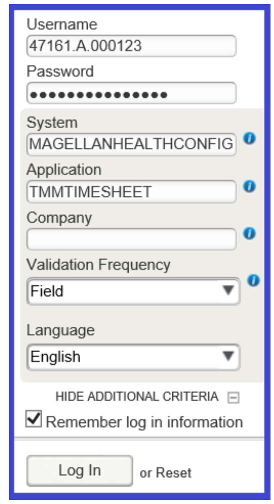


Click the link that says, “Enter your Timesheet or Expense Report” located on the left side of the screen.

The following login screen will appear:

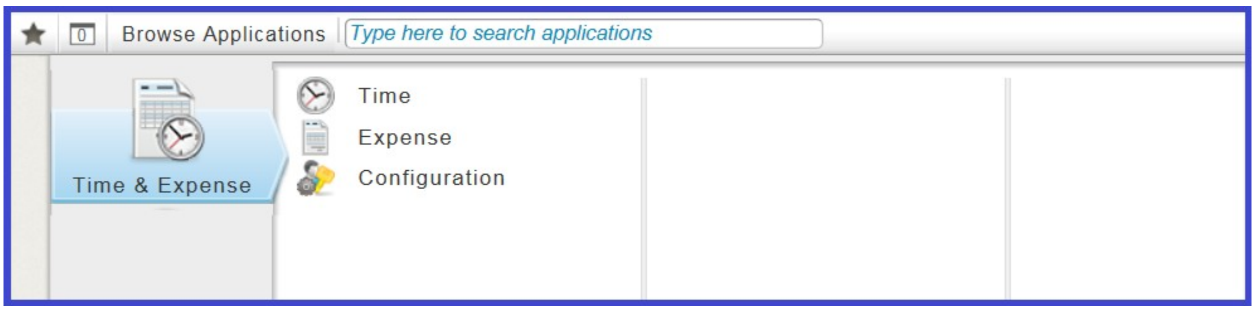
Step 3: Required Information

Enter the following information:

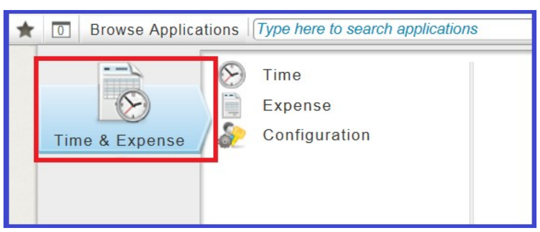


- **Username:** This will be a 5-digit code starting with "47161" plus a period (".") plus the letter "A" plus a period (".") plus your Employee ID
- Example: 47161.A.000123
- **Password:** The password that you should use is the password that you created when setting up your Deltek Cloud account. To reset your password please click here.
- **System:** Enter "MAGELLANHEALTHCONFIG"
- **Application (optional):** Enter "TMMTIMESHEET" in this field. By doing this, the system will take you directly to the timesheet screen.
- Press "Log In" when finished.

Note: If you entered a value in the "Application" field on the log in screen, you will be taken directly to the timesheet and you can skip to Step 6.

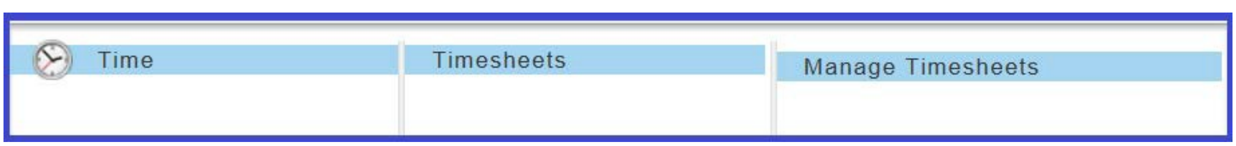


Step 4: Click on the Time & Expense Button



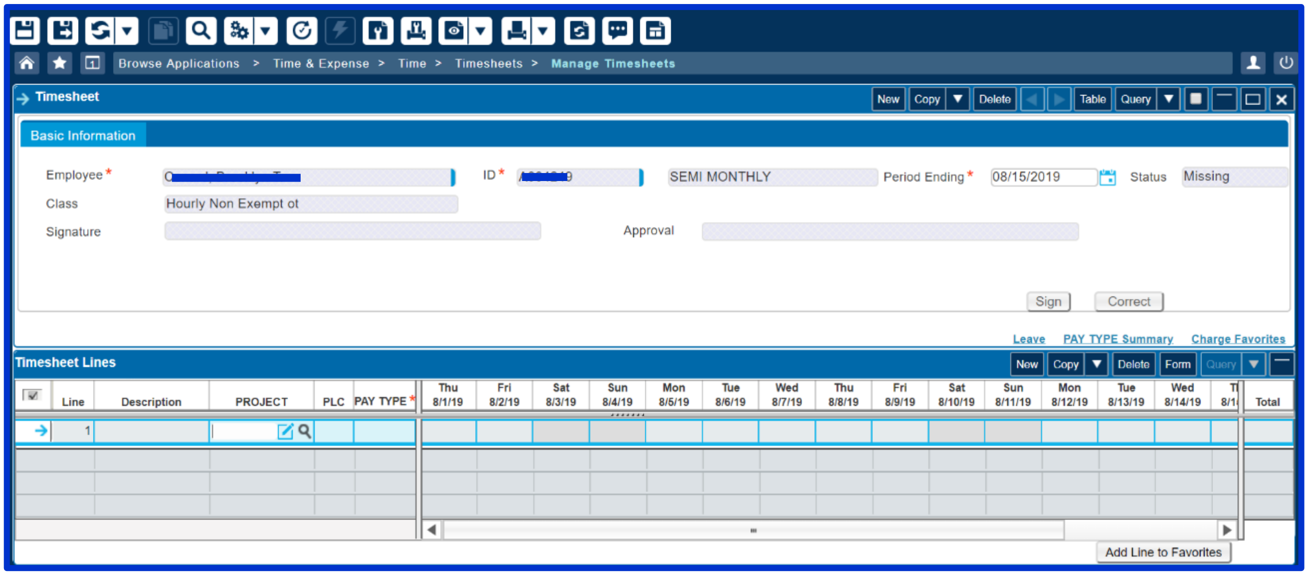
Step 5: Go to the "Manage Timesheets" Screen

(Time & Expense >> Time >> Timesheets >> Manage Timesheets)

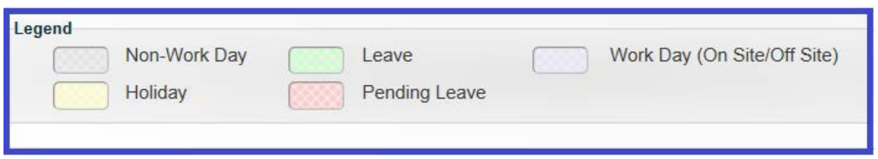


The timesheet that you will see is the one that contains today's date. When you first enter the screen, the "Basic Information" tab will be displayed.

Basic Information Tab



Note: Company holidays will appear yellow in the hours cell; weekend days will appear grey, and scheduled leave will appear as green. This is to serve as a visual reminder. You may still enter regular hours if you work hours on these days.



Highlighted Information

Status

This displays the status of the timesheet. Statuses include:

- **Missing:** your timesheet has not been started for the timesheet period
- **Open:** your timesheet has been started but is not yet completed
- **Signed:** your timesheet has been signed. You can make changes to your timesheet but you will need to enter an explanation and re-sign it.
- **Approved:** your timesheet has been approved. You can make changes to your timesheet but you will need to enter an explanation and re-sign it, and it will need to be re-approved.
- **Rejected:** your timesheet has been rejected. You must make a change or update your timesheet and re-sign it. Notification will be sent to your supervisor for approval.
- **Processed:** your timesheet has been processed to the financial system. It cannot be changed at this point unless you do a correcting timesheet.

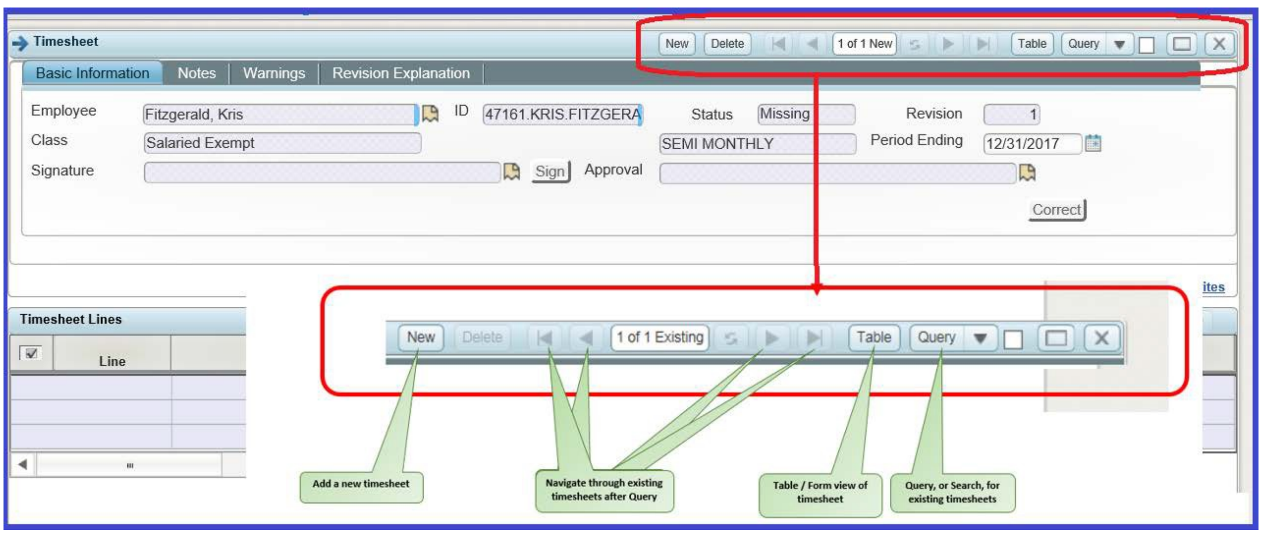
Period Ending

This will show you the date that the timesheet period ends. Timesheets must be signed by end of this date.

Sign

Select the "Sign" button to sign your timesheet. Once signed, your name will appear in the "Signature" box.

Application Toolbar

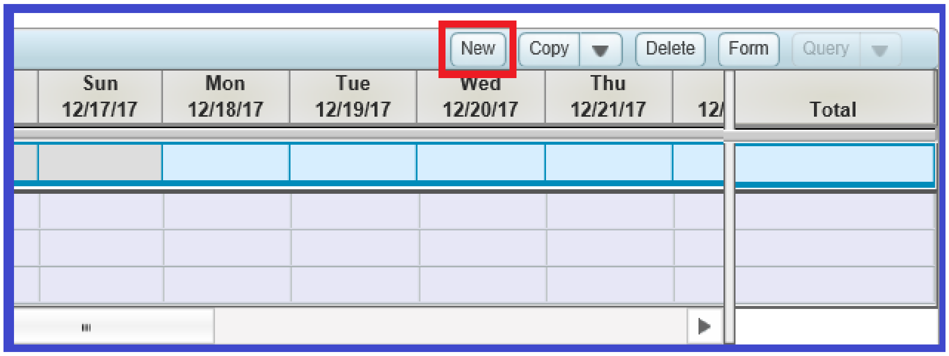


Application Options

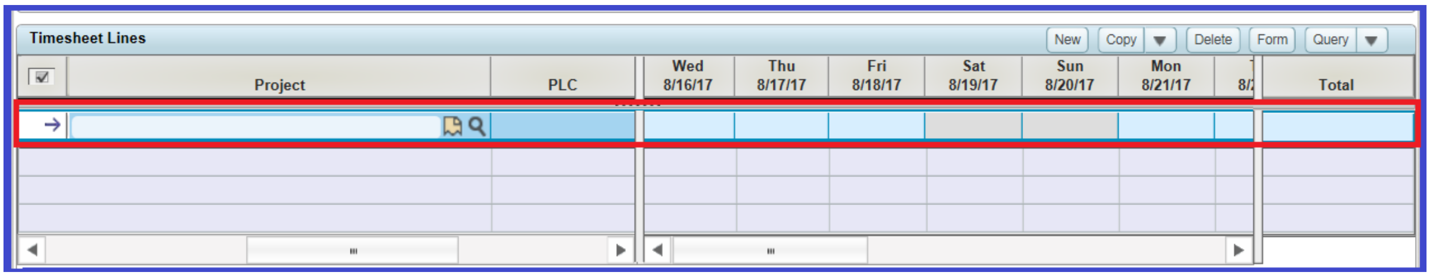
- **New:** start a new timesheet by pressing the "New" button
- **Navigation Button:** scroll through your timesheet by clicking the arrows to the left or right
- **Table:** if pressed, the system will change the view to a table view where timesheet information is displayed in rows and columns. Once pressed, the button changes to "Form" and, if pressed, will display all timesheet information in boxes on the screen
- **Query:** used to search or find your other timesheets either for a period before or after the current period.

Step 6: Adding Charges to Your Timesheet

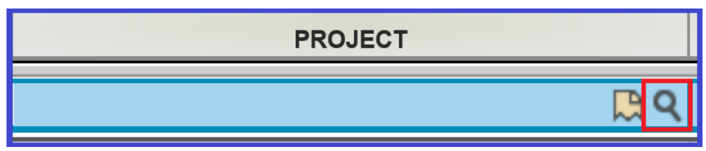
Press the "New" button to add a row to your timesheet:



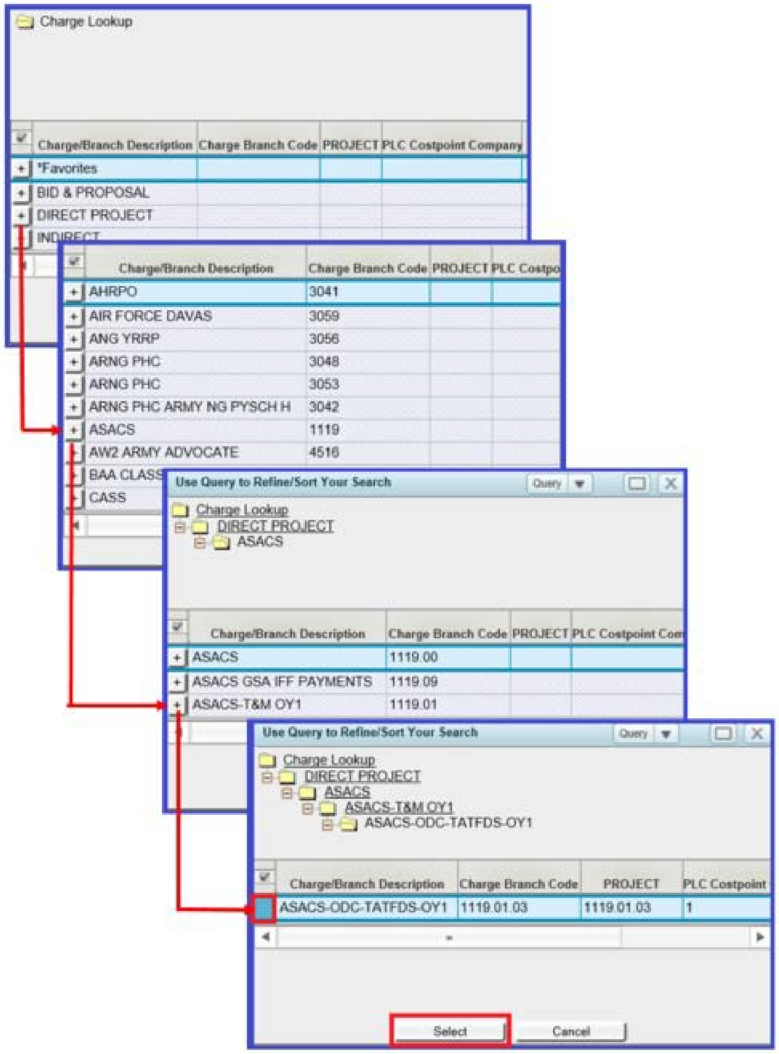
A new row will appear on your timesheet.



Press the magnifying glass to display the Charge Lookup to pick the project to add to your timesheet:



Drill down until you get to the charging level of the project:



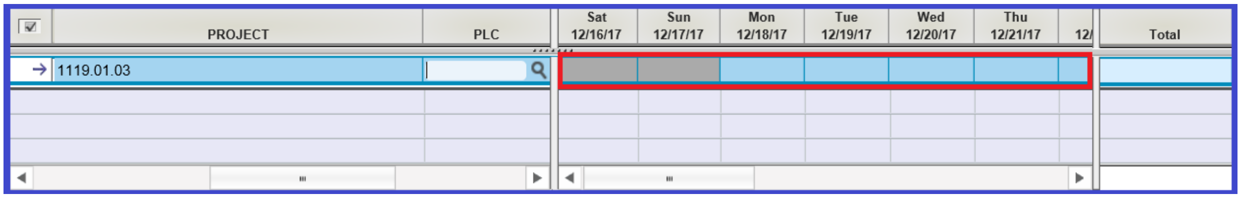
Only those projects that you are authorized to see will appear in your Lookup. Use the plus sign ("+") to drill down to the charging level of the project. You will know that you have reached the charging level when the row no longer has a checkbox:

- Press "Select" to select the project to add to your timesheet.
- Use the magnifying glass to look up other information that may be required for your project.
  - For example, some projects may require a Labor Category, or PLC. The "PLC" column should be available for you to perform a Lookup and select the appropriate Labor Category to add this row.
- Add additional projects the same way.

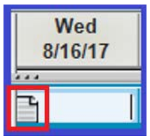
When to charge time to Overhead:

- Activities that do not directly support a client program and generate revenues, but are needed to maintain business operations. Examples such as, Staff Meetings, Leadership Meetings, Industry Seminars, Corporate Training (if no specific co-wide charge code provided), Professional Training, Finance 101 attendance, Employee performance planning and reviews.

Step 7: Add Hours Daily at End of Day

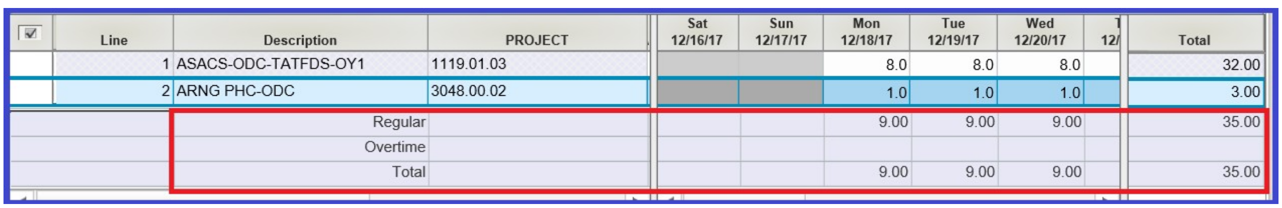


- Enter all hours worked for each project.
  - Hours can be entered in 1/10 hour increments (example: 4.5, 3.4, 10.9, etc.)
- Enter any cell notes in the corresponding note field:

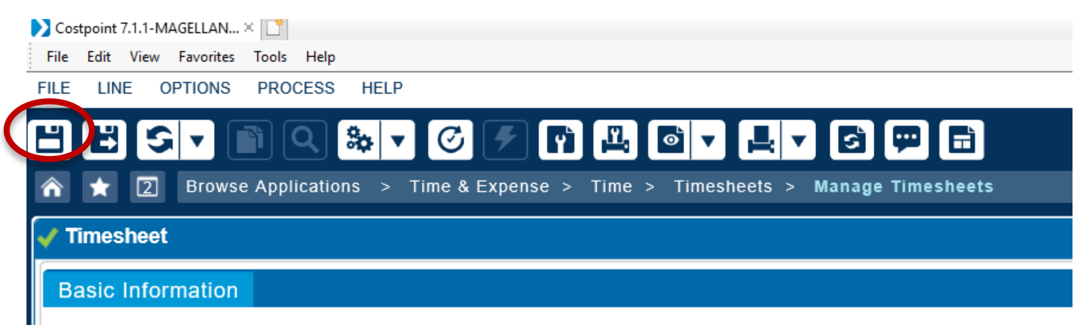


- Enter any line notes in the corresponding note field:

The Regular hours, Overtime hours, and the total number of hours worked each day will be displayed at the bottom of the timesheet:

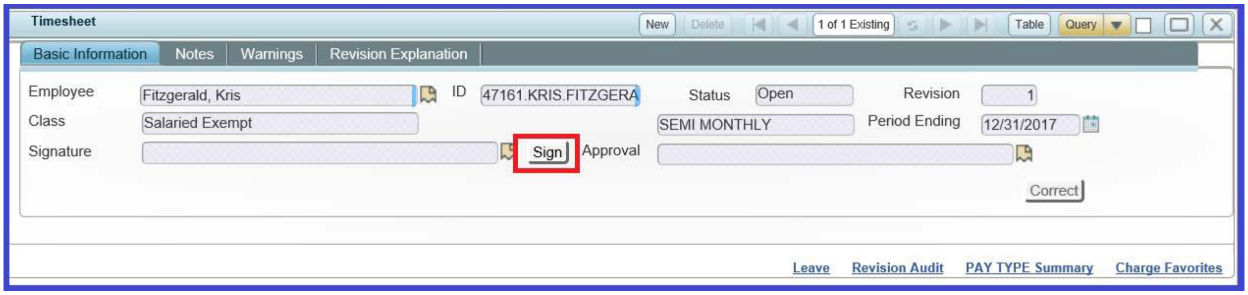


*****Remember to Hit the "SAVE" button in the upper left corner before leaving your timesheet each day, otherwise it will appear as though you did not record anything*****



Step 8: Sign Your Timesheet

To sign your timesheet, press the "Sign" button located in the header of the timesheet:



Once signed, if you make any changes or additions to your timesheet, you will need to add an explanation as to why you made these changes and re-sign your timesheet.

Notification will be sent to your supervisor to review your timesheet and then approve or reject it.

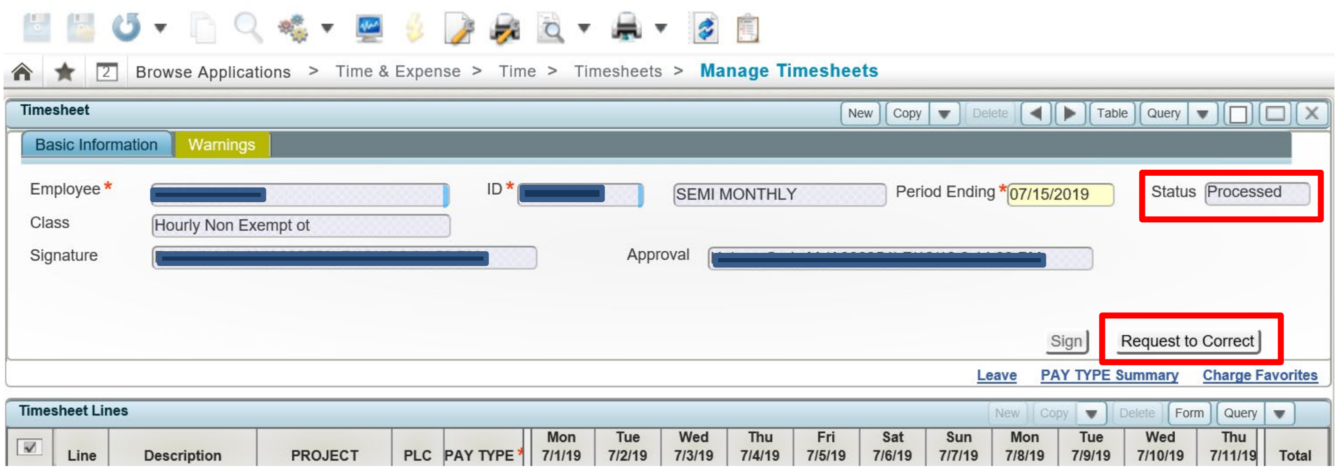
If your timesheet is rejected, you will receive notification that it has been rejected and you will need to make any necessary modifications and re-sign your timesheet.

*** Employees are required to record actual hours worked and sign timesheets on the last day of the pay period. Supervisors will approve by noon EST the following day***

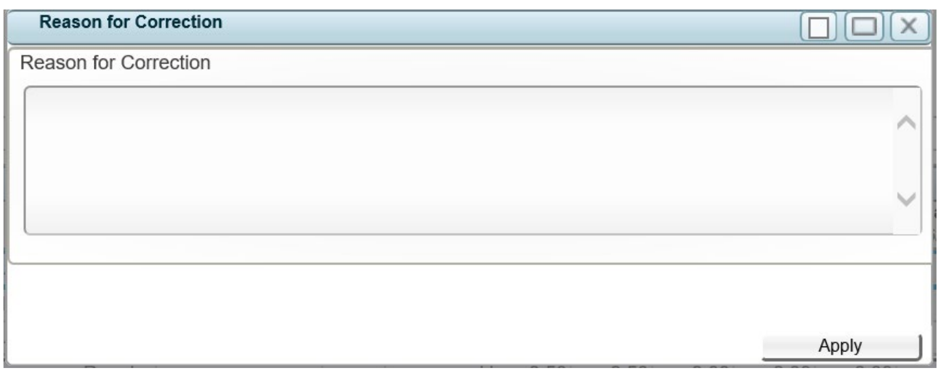
How to Request a Timesheet Correction

To request a correction, follow these steps:

- **Step 1:** On the Basic Information tab of your timesheet, click the "Request to Correct" button. Corrections can only be completed once your timesheet is in "Processed" status.



- **Step 2:** After you click "Request to Correct", an explanation box will appear. Please detail the reason for the correction and Save. A notification will be sent to your supervisor for their approval.



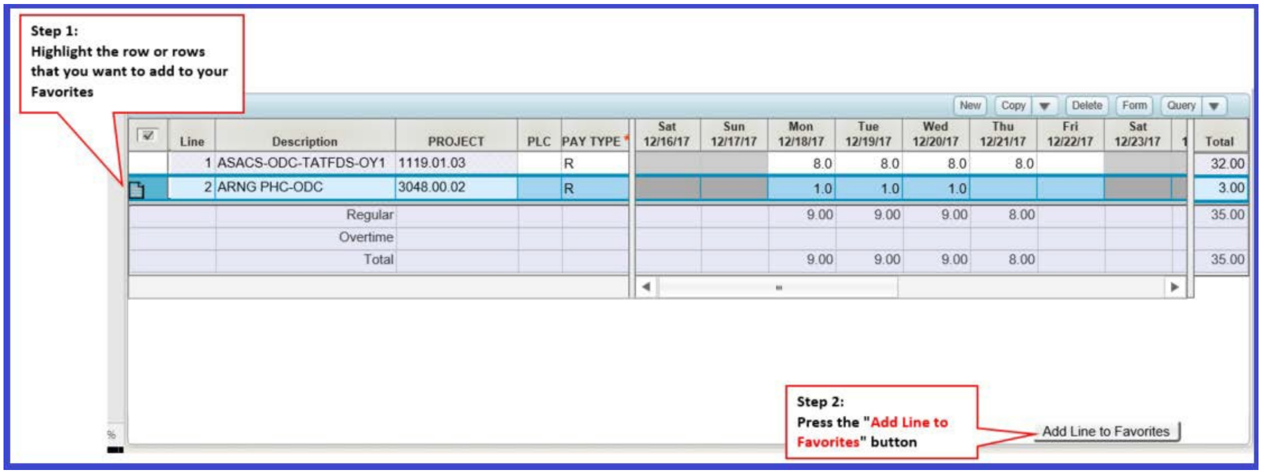
- **Step 3:** When your supervisor has approved, your timesheet will be open for corrections. After you have made the corrections, Save and Re-Sign your timesheet. Ensure your supervisor is aware the corrections are complete as he or she will need to reapprove as well.
    - A training video for this process can be found here. If you have any questions, please contact GETPAYROLL@AFSC.COM.

Timesheet Tips & Tricks

Adding a Line to Your Favorites

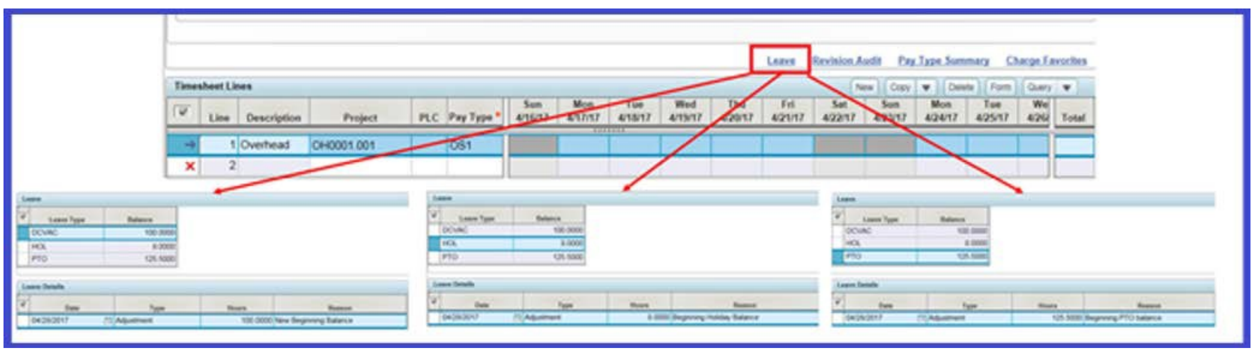
To add a line to your list of Favorites:

- **Step 1:** Highlight the row or rows that you want to add to your Favorites
- **Step 2:** Press the "Add Line to Favorites" button



Leave Balances

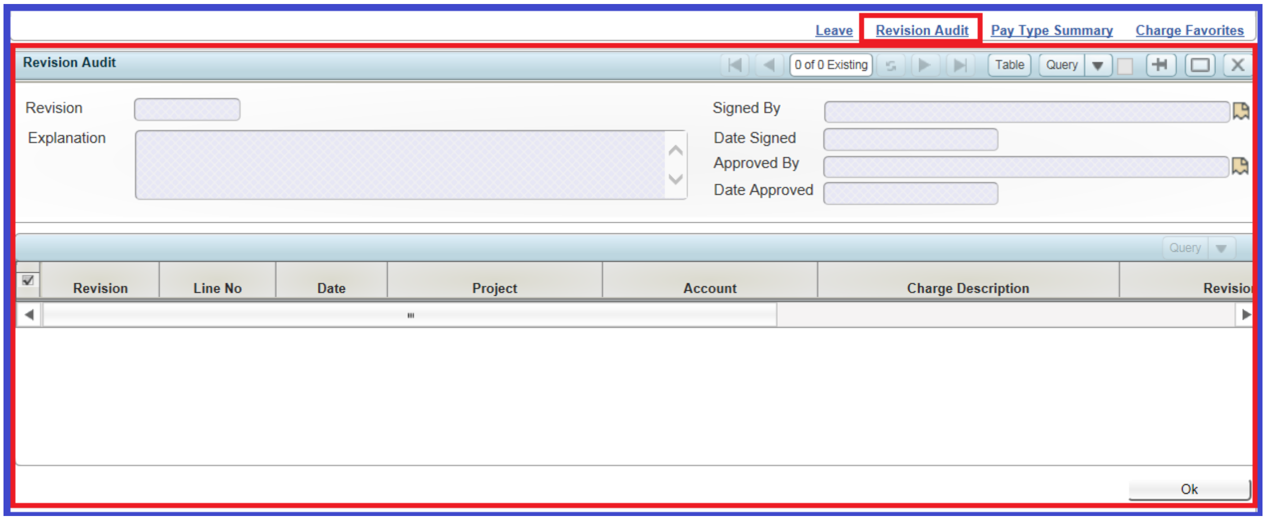
To view your leave balance, press the "Leave" link located in the middle of the screen:



The balance will contain any leave that has been accrued as well as any leave that has been taken, including the leave entered on your current timesheet.

Revision Audit

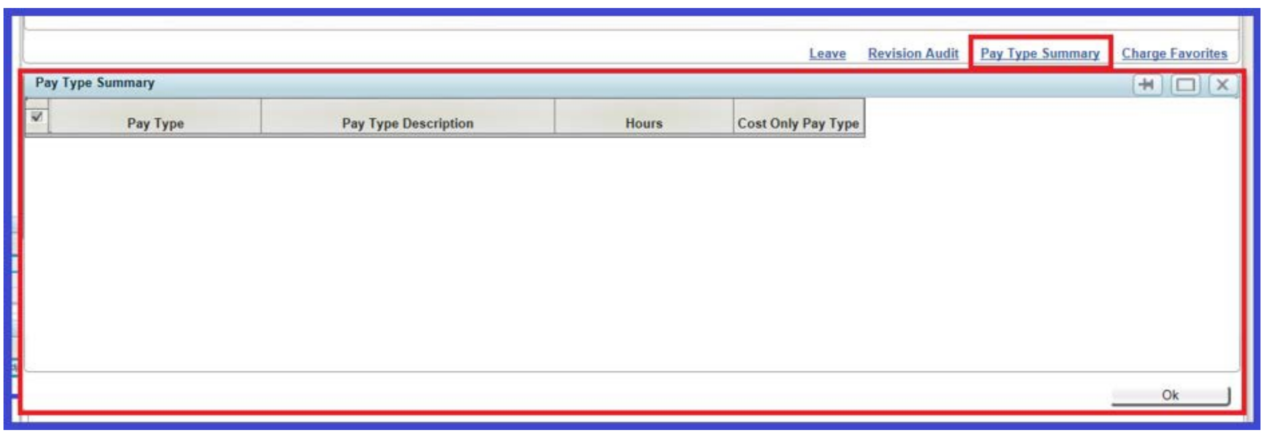
To view the audit trail of this timesheet, press the “Revision Audit” link located in the middle of the screen.



Here you can view the reason(s) why a modification was made to this timesheet. Please note: The “Revision Audit” link will only by available if a modification that required an explanation was made.

Pay Type Summary

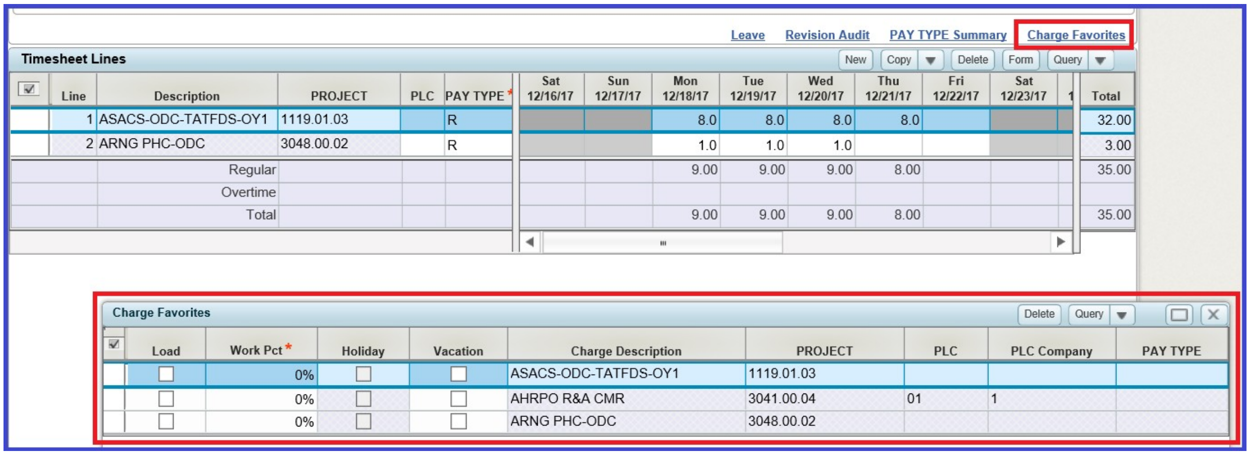
To view a summary of the Pay Types that were entered on this timesheet, press the “Pay Type Summary” link located in the middle of the screen:



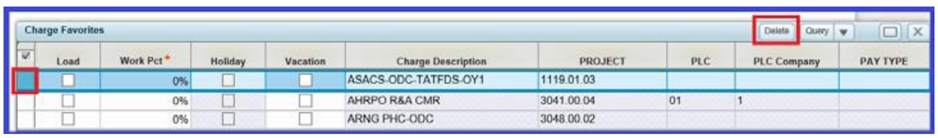
Here you can view the total that was charged to each of the Pay Types (Regular, “R”; Overtime, “O”; etc.)

Charge Favorites

To see the projects that are currently listed in your Favorites, press the "Charge Favorites" link located in the middle of the screen:



From here, you can view or delete any Favorites that you've added from a timesheet by highlighting the row and pressing the "Delete" button. Charge codes which are no longer used should be deleted to reduce charging errors:



Notes Tab

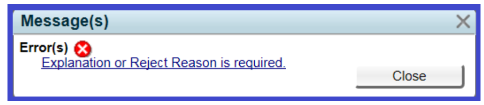
This tab displayed any notes that your supervisor may have added to your timesheet.

Warnings Tab

This tab will display any warnings that you received regarding the timesheet.

Revision Explanation Tab

If you have made a modification to your timesheet, the system will display an error message saying that an explanation is required. You will not be able to save your timesheet until you add an explanation.

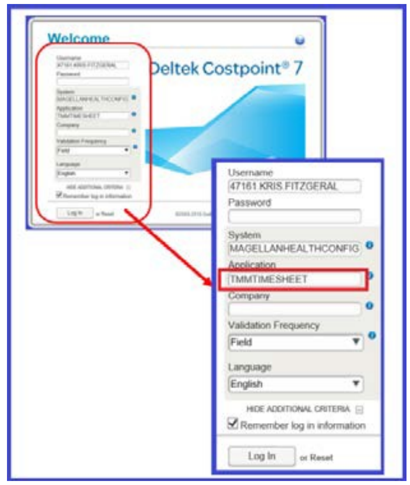


Press Save () or Save/Continue () when finished.

Setting Preferences

Defaulting the Application Name for Direct Entry to the Timesheet

By typing in “TMMTIMESHEET” in the “Application” field when logging in, you will be taken directly to the timesheet screen so you will not have to scroll through the screens.

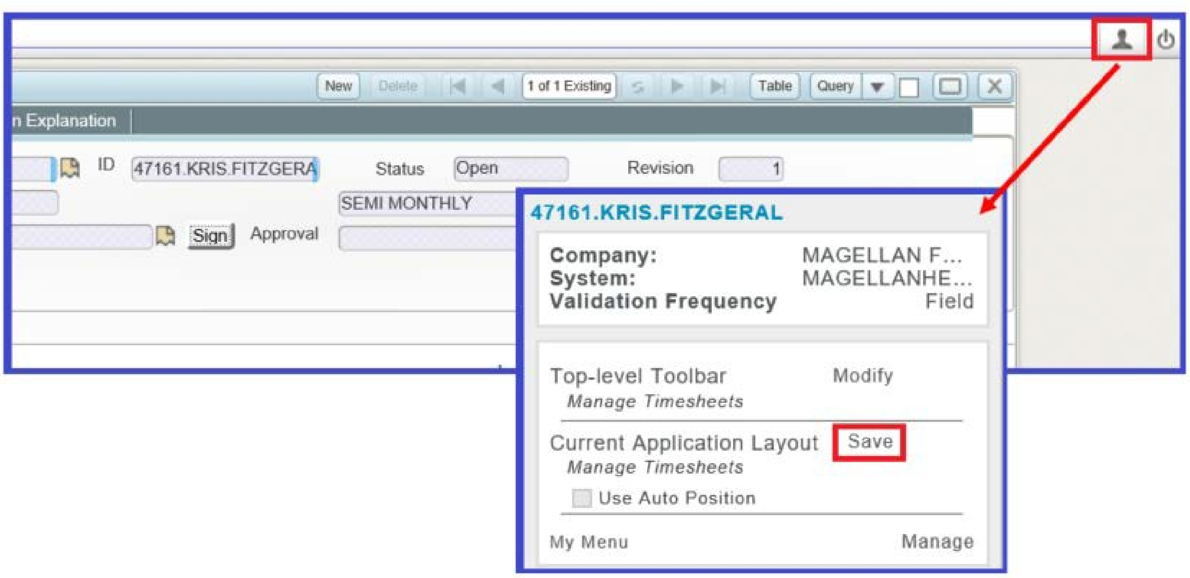


Changing Column Size

To change the size of a column on the timesheet, put your cursor in the space between the column that you want to change and the column to the right of that column.

For example, if I want to change the size of the “Project” column, I will put my cursor in between the “Project” column and the “Description” column:

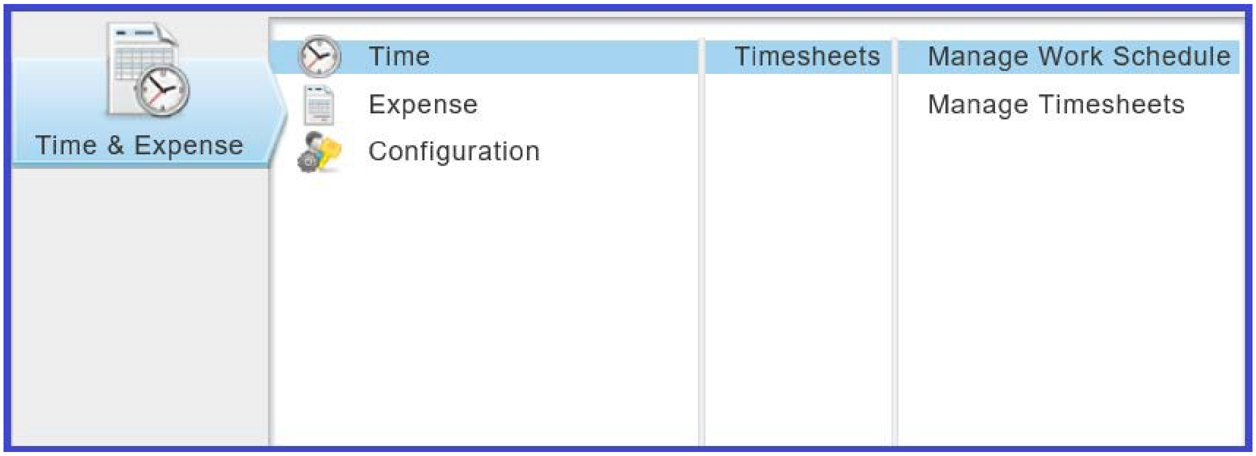
- The cursor will change to this icon.
- You can now expand or shrink the Project column by dragging the icon in any direction.
- To save this layout, press the silhouette icon located at the top of the screen and then press “Save” in the “Current Application Layout” section.



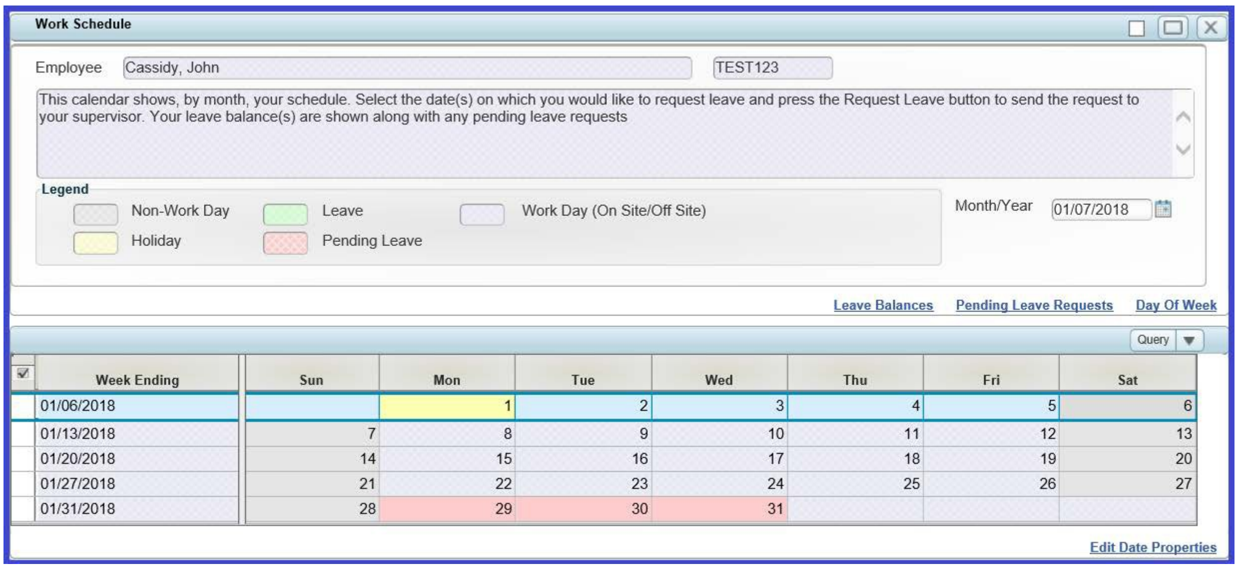
Requesting Leave

To request leave (PTO or Annual Leave), do the following:

- **Step 1:** Go to the Manage Work Schedule screen
  - (Time & Expense >> Time >> Timesheets >> Manage Work Schedule)

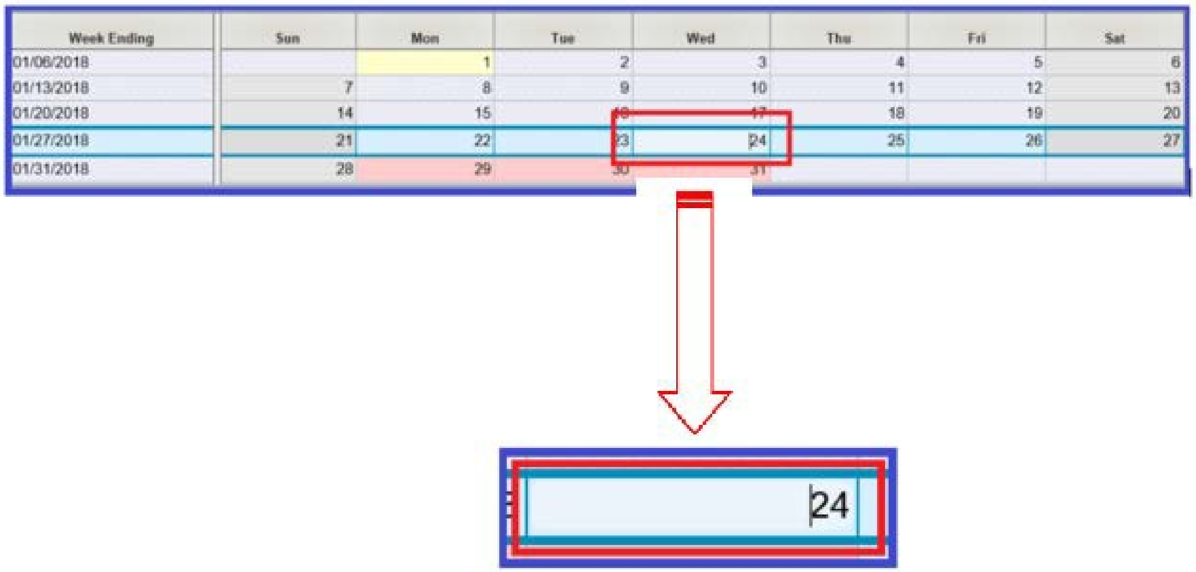


- **Step 2:** Your Work Schedule will appear. It will default to the month that contains the current date:

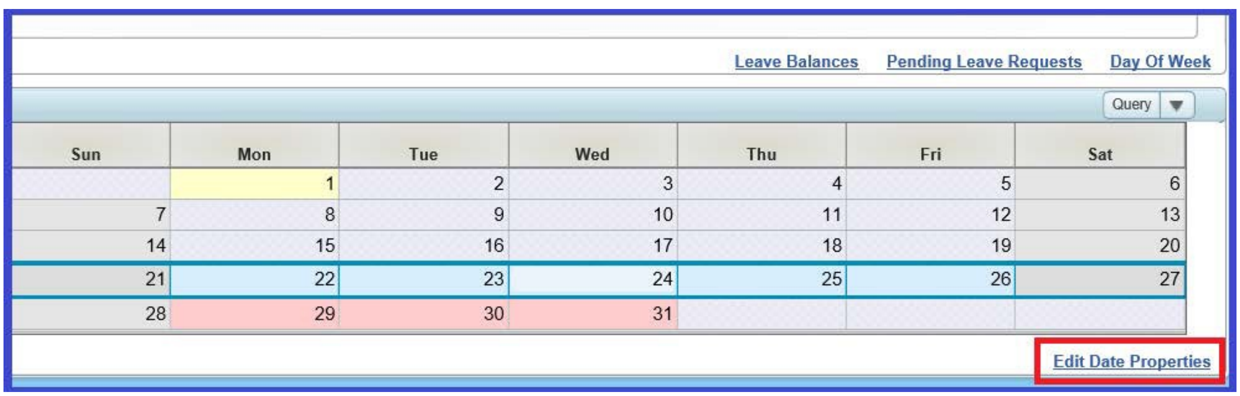


Use the following legend for guidance:

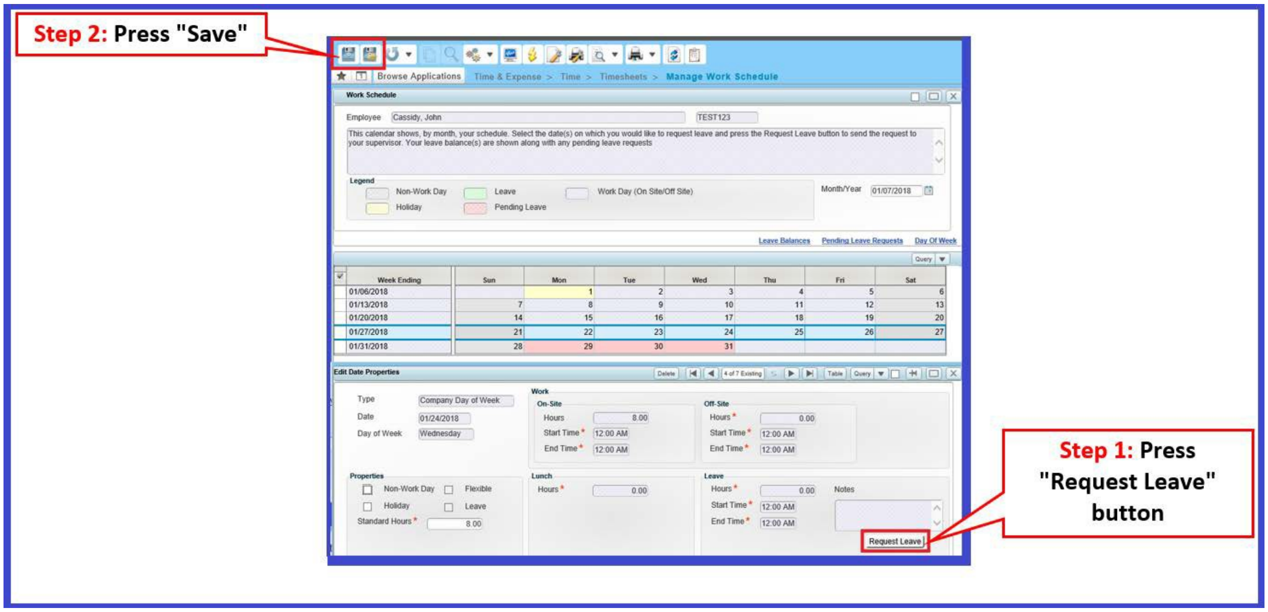
- **Step 3:** To request a day off, put your cursor in the day that you are requesting:



- **Step 4:** Then press the "Edit Date Properties" link located on the bottom, right side of the screen:

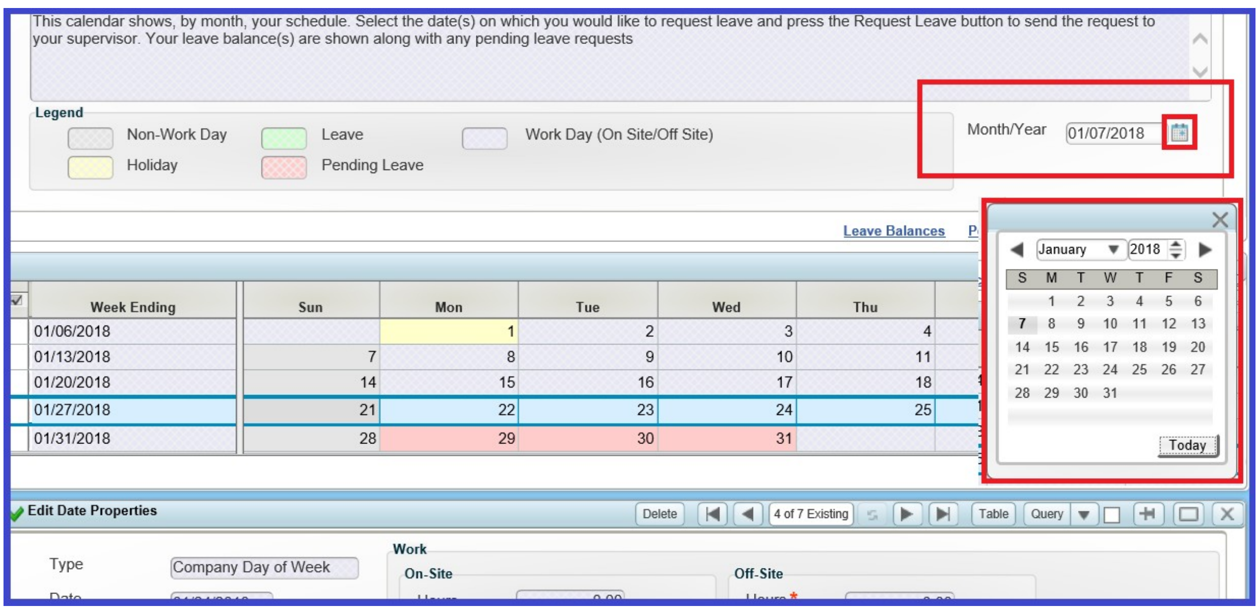


- **Step 5:** Press the "Request Leave" button and then Save the record by pressing the "Save" button:



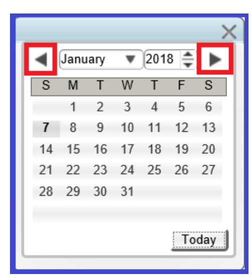
To request leave in a DIFFERENT MONTH than the current month:

- **Step 1:** Go to the "Month/Year" field located on the right side of the Work Schedule screen and press the Calendar icon:

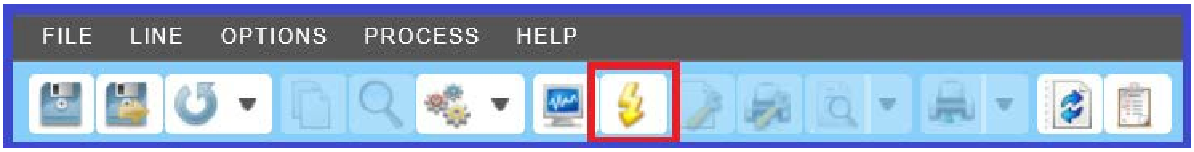


  – A calendar will appear.

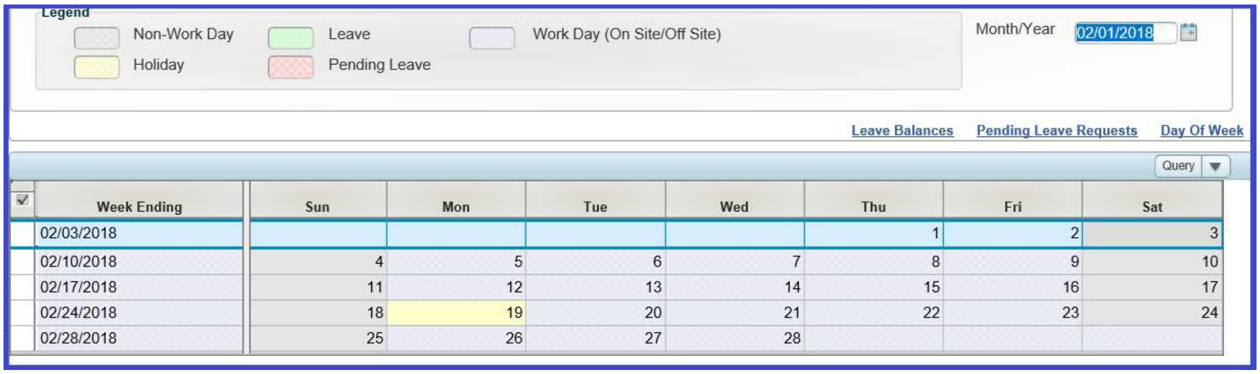
- Using the arrows at the top of the screen, change the month until the proper month appears:



Press the Execute icon located at the top of the screen. This icon is a lightning bolt icon:



The calendar at the bottom of the screen will change to the month that you have selected:



Week Ending	Sun	Mon	Tue	Wed	Thu	Fri	Sat
02/03/2018					1	2	3
02/10/2018	4	5	6	7	8	9	10
02/17/2018	11	12	13	14	15	16	17
02/24/2018	18	19	20	21	22	23	24
02/28/2018	25	26	27	28			

You can now request days off for dates that are in a different month than the current month.

Pay Periods

The Pay Periods are the first of the month through the fifteenth and the sixteenth through the last day of the month. Your timesheet will need to be signed and submitted on the **last business day** of the pay period. Supervisors will approve by **noon** the following day. For example, in August the pay periods will be: 8/1/19 – 8/15/19 and 8/16/19 – 8/31/19. This means you will sign your timesheet on the 15th and on the 30th.

The 2019 pay calendar below includes pay dates, holidays and observances.

2019 Holidays & Observances

Jan 1	New Year's Day
Jan 21	Martin Luther King Day
Feb 18	Presidents' Day
May 27	Memorial Day
Jul 4	Independence Day
Sep 2	Labor Day
Oct 14	Columbus Day
Nov 11	Veterans Day
Nov 28	Thanksgiving Day
Dec 25	Christmas Day

2019 Pay Dates

January	7th – Mon.	22nd – Tue.
February	7th – Thurs.	22nd – Fri.
March	7th – Thurs.	22nd – Fri.
April	8th – Mon.	22nd – Mon.
May	7th – Tue.	22nd – Wed.
June	7th – Fri.	21st – Fri.
July	8th – Mon.	22nd – Mon.
August	7th – Wed.	22nd – Thurs.
September	6th – Fri.	23rd – Mon.
October	7th – Mon.	22nd – Tue.
November	7th – Thurs.	22nd – Fri.
December	6th – Fri.	23rd – Mon.

JANUARY

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

FEBRUARY

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28		

MARCH

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

APRIL

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

MAY

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

JUNE

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

JULY

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

AUGUST

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

SEPTEMBER

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

OCTOBER

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

NOVEMBER

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

DECEMBER

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				