Managing Entries – Guide

Description: In this topic, the user will learn how to manage entries.

Roles Required: Super User, Supervisor, Employer

Permissions Required: N/A

Contents

Available Actions by Entry Status

The following outlines the actions that can be taken, based on entry status, by an employee (E) and by a user with a Supervisor role (S) for the cost center in which the entry was made.

*Please note: In FI Mode, Employer is equivalent to Supervisor throughout this document.

Entry Status	Description	View E	View S	Edit* E	Edit* S	Cancel* E	Cancel* S	Reject E	Reject S	Approve E	Approve S
Pending	The entry has been saved and is awaiting review by the supervisor. Most pending entries can be edited except for Residential and Day program entries, which can only be edited or rejected by the employee if True Clock In/Out is set to No on the associated employee service account.	X	X	X*	X			X*	X		X
Open	A true clock in/out entry that has been clocked in but has not been clocked out of	X	X						X		
Approved	The pending entry has been reviewed and approved by the supervisor and is ready for billing/payroll	X	X		X		X				
Rejected	A pending entry that has been reviewed and rejected by the employee or supervisor or an original entry that has been edited	X	X								
Canceled	An approved entry that has been backed out. Has been paid and/or billed correctly.	X	X								
Compensated	An original entry that has already been approved, batched, or paid that has been edited. Does not necessarily indicate the entry has been paid.	X	X		X						

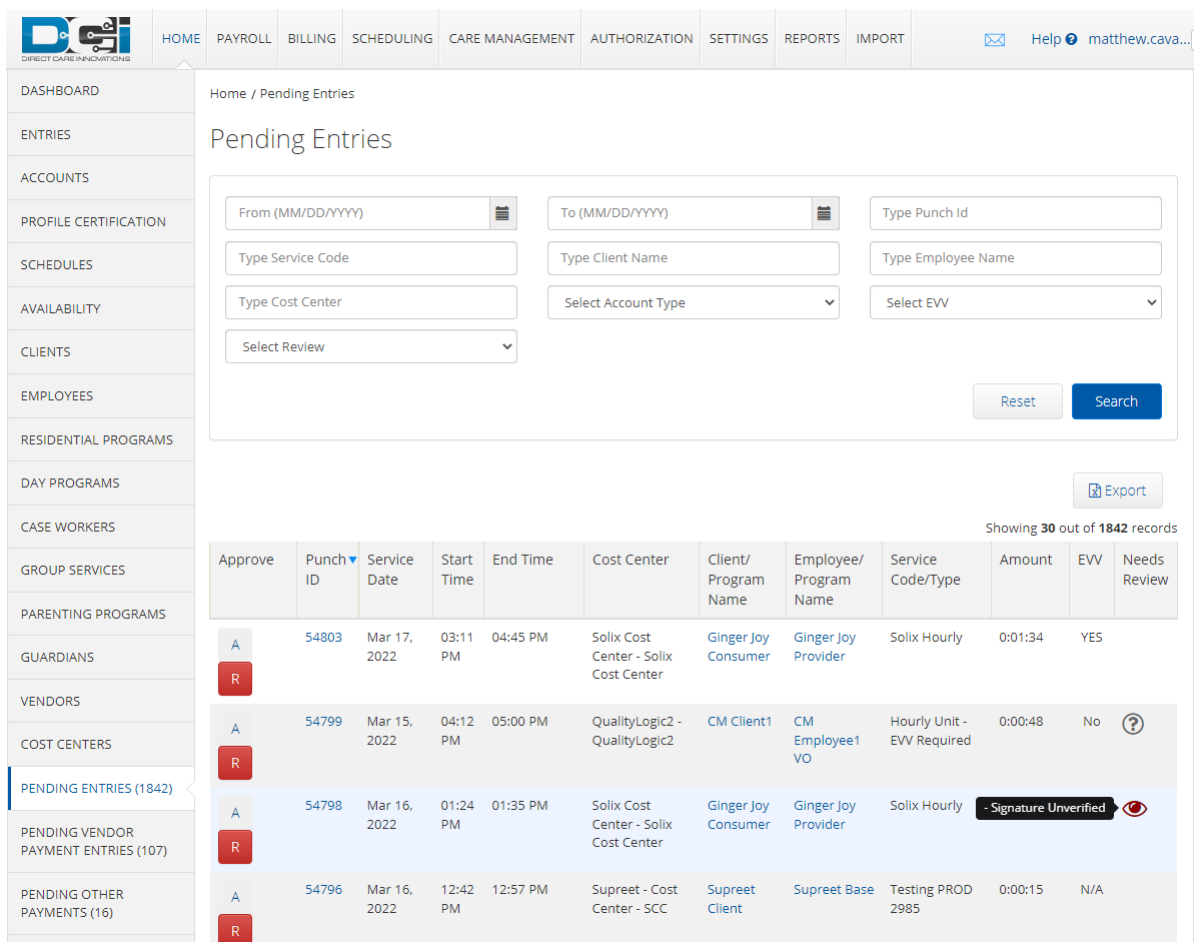| Status	Description											
Unvalidated	If a phase 2 business rule is enabled, the entry may be in unvalidated status after the entry was created, and before the business rule runs.	X	X									X
Unverified	The entry was made/edited on behalf of an employee and must be verified or rejected by the employee before further action can be taken. Only applicable to punch entries.	X	X								X	X
Batched	An approved entry that has been included in a pending payroll batch	X	X		X		X					
Processed	An approved entry that has been processed in a payroll batch	X	X		X		X					
Paid	An approved entry that has been paid out (salaried punches that have been processed automatically show a status of Paid; all other entries change to Paid 3 days after payroll was transmitted)	X	X		X		X					
Write Off	An approved entry was not billable and has been written off by processing in a Write Off batch	X	X									
Void	An approved, paid, and reconciled entry that was incorrect. No further action can be taken (cannot be canceled, edited, or billed).		X									

Additional Notes
- Pending residential and day program entries *cannot* be edited by the employee unless True Clock In/Out is set to No on the associated employee service account, in which case the employee can edit or reject the pending entry.
  - All other types of entries can be edited by the employee while in pending status
- When a pending entry is edited, two entries are created:
  - The original entry moves to a rejected status
  - The new (reference) entry reflects the correct shift and has a status of unverified

- When an entry is canceled, a new entry for a negative amount that zeroes out the original entry is created and is automatically approved. Both the canceled entry and the reference entry show an approved status.
- When an entry that spans 2 days (crosses midnight) is approved, the following occurs:
  - The original entry is canceled
  - Two new entries are created in the Approved status
    - One entry for the first date, ending at midnight
    - One entry for the second date, starting at midnight

Pending Entries Page

Description: The Pending Entries submenu tab houses all pending entries. View pending entry details, manually approve or reject pending entries, or export pending entries. Auto approval and frequency is an instance-level setting that the organization may enable. Pending entries that meet the criteria for auto approval will approve when that process runs and will drop off of the pending entries list. See the Auto Approval section below for more information on this process.

Search Pending Entries

1. Log in to DCI with personal profile
2. Click **Home** on the main menu

3. Click **Pending Entries** on the submenu
    a. The number of Pending Entries will display on the submenu in brackets - i.e., Pending Entries (10). This alerts users to pending entries that require attention.
4. Use the filters to search for a pending entry. Search by any of the following:
    a. Date Range
    b. Punch ID
    c. Service Code
    d. Client Name
    e. Employee Name
    f. Cost Center
    g. Account Type
    h. EVV – Can select Yes
    i. Review – Can select Review Needed, or No Review Needed
5. Click **Search**
6. Locate the punch in the entries table or sort results by clicking on a column header

View Pending Entries

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Pending Entries** on the submenu
    a. The number of Pending Entries will display on the submenu in brackets - i.e., Pending Entries (10). This alerts users to pending entries that require attention.
4. Use the filters to search for a pending entry and click **Search**
5. Locate the punch in the entries table
6. Entry table columns:
    a. Approve - Click **A** to approve or the red **R** to reject
    b. Punch ID - Number that is hyperlinked to the punch details page
    c. Service Date
    d. Start Time
    e. End Time
    f. Cost Center
    g. Client/Program Name – Name that is hyperlinked to the client or program details page
    h. Employee/Program Name – Name that is hyperlinked to the employee or program details page
    i. Service Code/Type – Type of service (i.e., group service, vacation, hourly, etc.)
    j. Amount – Amount of service in units
    k. EVV – Yes, no, or N/A
    l. Needs Review – If the entry needs review, this column will display a gray **?** or a red **Eye** icon.

          i. Hover over the icon to view the violation

          ii. Typical violation examples include portal sign-off pending, a business rule violation, EVV failure, geofencing failed, or schedule deviation.

          iii. Scroll down to the Manage Pending Entries Needs Review section of this guide for additional information

7. Click anywhere in the **entry row** to view the punch detail page

    a. View widgets regarding the punch:

        i. Punch Details

        ii. Account Details/Service Account

        iii. EVV Details

        iv. Reason Codes

    b. Click the tabs to view additional punch details such as:

        i. Reference Entries – Entries associated with the pending entry

        ii. Notes and Attachments –Images associated with client attestation

        iii. History

Export Pending Entries

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Pending Entries** on the submenu
4. The number of Pending Entries will display on the submenu in brackets - i.e., Pending Entries (10). This alerts users to pending entries that require attention.
5. Export entries by clicking the **Export** button above the entries table on the right-hand side of the page

    a. If no search criteria are defined, all pending entries in the table will be exported.

    b. If search criteria are defined, only the entries in the search criteria will be exported.

6. Open the .csv file from the device downloads
7. Excel will open
8. Sort and format downloaded data as needed

Manage Pending Entries Needs Review

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Pending Entries** on the submenu

    a. The number of Pending Entries will display on the submenu in brackets - i.e., Pending Entries (10). This alerts users to pending entries that require attention.

4. If an entry needs review, the Needs Review column will display a gray **?** or a red **Eye** icon.

    a. Gray **?** – review the needs review column for the warning, determine the action to take on the punch

       b. Red **Eye** icon – Action is required prior to approving the punch, review the needs review column

5. Choose **Review Needed** from the drop-down in the Select Review filter to search for pending entries needing review
6. OR sort all pending entries by clicking on the **Needs Review column header** so that entries needing review sort to the top
7. Hover over the red-eye icon to view the violation
8. Typical violation examples include a business rule violation, EVV failure, geofencing failed, or schedule deviation.
9. Click anywhere in the **entry row** to view the punch detail page
10. If the error is Unverified Signature, Picture, or Voice, click the Verifications tab
       a. Click the **attachment link** to open and compare
       b. Click **A** to approve the verification or the red **R** to reject the verification
       c. Please note: While the verification has been approved and the issue resolved, the punch must still be approved.
11. Schedule deviation errors can simply be approved or rejected
12. Click **Actions**
13. Choose from the following to act and remove the Needs Review flag:
       a. Sign Off
       b. Approve
       c. Reject
       d. Edit Entry

Approve Pending Entries

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Pending Entries** on the submenu
       a. The number of Pending Entries will display on the submenu in brackets - i.e., Pending Entries (10). This alerts users to pending entries that require attention.
4. Use the filters to search for a pending entry and click **Search**
5. Locate the punch in the entries table
6. Click **A** to approve
       a. Click **Yes** to confirm
7. Alternatively, click anywhere in the entry row to view the punch detail page
       a. Click **Actions**
       b. Select **Approve** from the drop-down menu
       c. Click **Yes** to confirm

Reject Pending Entries

1. Log in to DCI with personal profile
2. Click **Home** on the main menu

3. Click **Pending Entries** on the submenu
    a. The number of Pending Entries will display on the submenu in brackets - i.e., Pending Entries (10). This alerts users to pending entries that require attention.
4. Use the filters to search for a pending entry and click **Search**
5. Locate the punch in the entries table
6. Click the red **R** to reject
    a. Click **Yes** to confirm
7. Alternatively, click anywhere in the entry row to view the punch detail page
    a. Click **Actions**
    b. Select **Reject** from the drop-down menu
    c. Click **Yes** to confirm

Edit Pending Entries

Description: Supervisors may correct/edit an employee's pending punch entry. Some conditions under which a supervisor might make such changes include:

- If the employee made an incorrect punch and is unable to change it themselves
- If the employee made an error entering a Day or Residential Program punch at a program

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter the employee's name in the Employee Name field then click **Search**
5. Click anywhere on the row to open the employee details page
6. Select the **Entries** tab located below the demographics box
7. Click anywhere in the row to open the punch details page
8. Click **Actions**
9. Select **Edit Entry from** the drop-down menu
10. Make the necessary changes on the **Edit Entry** form wizard
11. If the organization requires a reason code when editing a punch, select a reason(s) from the **Add Reason Codes** drop-down that best describes why the edit is being made. Multiple reason codes may be selected simultaneously.
12. Reason codes may require a text explanation. If this requirement is selected, complete the **Add Reason Code Note** field. The added reason code note will be saved with all selected reason codes that require a free text note.
13. Click **Save** and **Yes** to confirm

When the punch is modified, the Ref field is assigned a number that references the original punch, indicating the punch has been modified. To view the original and updated punches, select the **Entries** tab on the details page.

The updated employee punch assumes Unverified status, which requires the employee to log in to DCI and verify (acknowledge and concur with) the change(s). After the employee verifies the corrected punch, the status changes to Pending, and the supervisor must approve the punch.

Once approved, the approved or rejected entry will disappear from the Pending Entries screen and be shown under Entries for the program, or individually under Entries for the employee or client.

Auto Approval (Instance-Level Setting)

Description: Auto approval and frequency is an instance-level setting that the organization may enable. Pending entries that meet the criteria for auto approval will approve without a supervisor or employer manual approval when that process runs and will drop off the pending entries list. Entries that do not meet the criteria would remain in pending status for review by the supervisor or employer.
*Please note: If an entry's funding source has the auto-approval setting
Exclude From Auto Approval set to Yes, the entry will not be attempted by auto-approval, even if it passes all business rules, and the entry will remain in a status of pending.
If the funding source of the entry has the setting Approve Unverified EVV set to No, the picture, signature, or voice recording must be approved before auto approval runs or the entry will fail auto approval and remain in a pending status.

Auto Approval can be configured for these account types:
- Hourly
- Client Transportation
- Residential Programs (employee punch entries only)
- Day Programs (employee punch entries only)

Available Criteria for Auto Approval
- Does it put the employee over 40 hours in the pay week?
- Does it put the client over the authorization?
- Did it match the schedule (within an acceptable variation)?
- Was it entered from an approved location (did it pass geofencing)? **(Hourly Only)**
- Does the punch entry have completed client attestation (EVV)? **(Hourly Only)**

Entries with Completed Client Attestation (EVV):
- Phone EVV Entries
- Entries created with a valid FOB token
- Mobile App entries with any of the following:
  - PIN/Password attestation (EVV)
  - Signature attestation (EVV) (signature does not have to be verified unless Approve Unverified EVV field on the funding source is set to No)
  - Picture attestation (EVV) (picture does not have to be verified unless Approve Unverified EVV field on the funding source is set to No)

o Voice Recording attestation (EVV) (recording does not have to be verified unless Approve Unverified EVV field on the funding source is set to No)
- Entries with **completed** Portal Signoff

Business Rules
- If any of the business rules fail, the punch entry will fail auto approval.
    o Authorization business rule if enabled in mode 2
        ▪ Authorization Daily Max
        ▪ Authorization Weekly Max
        ▪ Authorization Monthly Max
    o Max Hours Per Week Per Employee
    o Timely Filing Employee Punch Approval (phase 3)

Punch Entries by Employee
Description: Supervisors may search, view, manage, and export employee punch entries using the Employee submenu tab.

Search Entries
1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Use the filters to search by any of the following:
    a. Employee Name
    b. Cost Center
    c. Employee Number
    d. Employee Type – Select from drop-down
    e. State – Select from drop-down
    f. Status – Select from drop-down
5. Click **Search**
6. Select the **row** in the entries table by clicking anywhere in the employee row to open the employee details page
7. Click the **Entries** tab
8. Click anywhere in the **punch row** on the entries table to open the punch details page
9. Use the filters to search for a specific employee entry. Search by any of the following:
    a. Date Range
    b. Punch ID
    c. Client Name
    d. Service Code
    e. Account Type – Select from drop-down
    f. Status – Select from drop-down
10. Click **Search**
11. Locate the punch in the entries table or sort results by clicking on a column header

View Entries

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Use the filters to search by any of the following:
   a. Employee Name
   b. Cost Center
   c. Employee Number
   d. Employee Type – Select from drop-down
   e. State – Select from drop-down
   f. Status – Select from drop-down
5. Click **Search**
6. Select the **row** in the entries table by clicking anywhere in the employee row to open the employee details page
7. Click the **Entries** tab
8. Click anywhere in the **punch row** on the entries table to open the punch details page
9. Use the filters to search for a specific employee entry. Search by any of the following:
   a. Date Range
   b. Punch ID
   c. Client Name
   d. Service Code
   e. Account Type – Select from drop-down
   f. Status – Select from drop-down
10. Click **Search**
11. Locate the punch in the entries table or sort results by **clicking on a column header**
12. Entry table columns:
    a. Id – Number that is hyperlinked to the punch details page
    b. Service Date
    c. Start Time
    d. End Time
    e. Account Type
    f. Ref. – Number that is hyperlinked to the original entry (if the punch was edited)
    g. Cost Center
    h. Client/Program Name – Name that is hyperlinked to the client or program details page
    i. Service Code
    j. Amount – Amount of service in units
    k. Status
13. Click anywhere in the **entry row** to view the punch detail page
    a. View widgets regarding the punch:

     i. Punch Details
     ii. Account Details/Service Account
     iii. Client Details
     iv. Employee Details
     v. EVV Details
     vi. Reason Codes
     vii. Statements

  b. Click the tabs to view additional punch details such as:
     i. Reference Entries – Entries associated with the pending entry. The 5th column (Ref.) is the original punch number. The 2nd column (Id) is the new entry number.
     ii. Notes and Attachments – Images associated with client attestation
     iii. Business Rules – Displays business rule(s) associated with the entry
     iv. History

Export Entries

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Use the filters to search by any of the following:
   a. Employee Name
   b. Cost Center
   c. Employee Number
   d. Employee Type – Select from drop-down
   e. State – Select from drop-down
   f. Status – Select from drop-down
5. Click **Search**
6. Export entries by clicking the **Export** button above the entries table on the right-hand side of page
   a. If no search criteria are defined, all entries in the table will be exported.
   b. If search criteria are defined, only the entries in the search criteria will be exported.
7. Open the .csv file from the device downloads
8. Excel will open
9. Sort and format downloaded data as needed

Approve Entries

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Use the filters to search by any of the following:
   a. Employee Name

b. Cost Center
c. Employee Number
d. Employee Type – Select from drop-down
e. State – Select from drop-down
f. Status – Select from drop-down

5. Click **Search**
6. Click anywhere in the **entry row** to view the punch detail page
7. Click **Actions**
   a. Select **Approve** from the drop-down menu
   b. Click **Yes** to confirm

Reject Entries

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Use the filters to search by any of the following:
   a. Employee Name
   b. Cost Center
   c. Employee Number
   d. Employee Type – Select from drop-down
   e. State – Select from drop-down
   f. Status – Select from drop-down
5. Click **Search**
6. Click anywhere in the **entry row** to view the punch detail page
7. Click **Actions**
   a. Select **Reject** from the drop-down menu
   b. Click **Yes** to confirm

Search, View, Manage, and Export all Entries by Object

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click one of the following tabs on the submenu to open the object page:
   a. **Employees** - All entries for a particular employee
   b. **Clients** - All entries for a particular client
   c. **Residential Programs, Day Programs, Group Services, or Parenting Programs** - Only punches for these programs or group service will appear on these pages. This excludes punches not made within the program or group service such as Training, Administration, Hourly, etc.
   d. **Cost Center** - All entries for a particular cost center
4. Use the filters to search by specific criteria and click **Search**

5. Select the **row** in the entries table by clicking anywhere in the row of the object (employee, client, program or group, or cost center) to open the object details page
6. Click the **Entries** tab
7. Click anywhere in the **punch row** on the entries table to open the punch details page
8. Click **Actions**
9. Select **Approve** or **Reject** from the drop-down menu
10. Click **Yes** to confirm
11. Export entries by clicking the **Export** button above the entries table on the right-hand side of the page
   a. If no search criteria are defined, all pending entries in the table will be exported.
   b. If search criteria are defined, only the entries in the search criteria will be exported.
12. Open the .csv file from the device downloads
13. Excel will open
14. Sort and format downloaded data as needed

Manage Punch Entry for Employee

Description: In this topic, the supervisor will learn how to add or edit employee punches for those they supervise. The best practice is for employees to enter and edit their punches, however, some situations require supervisor assistance (i.e., missed punches for Residential or Day Programs; approved punches that require editing, etc.).

Add a New Punch for an Employee
1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter the employee's name in the Employee Name field then click **Search**
5. Click anywhere on the row to open the employee details page
6. Click **Actions**
7. Select **New Entry** to **complete the form wizard**
   a. Entry Type is automatically set to Punch and the Employee Name field contains the employee's name
   b. From the Account Type menu, select the type of punch.
   c. The remaining fields will display the information that must be entered for the account type selected.
      i. **Add Reason Codes:** The organization may require a reason code when entering a punch, explaining why a non-EVV-compliant method of time entry has been added. Select a reason from the **Add Reason Codes** drop-down. **Please note:** Multiple reason codes may be selected simultaneously.
      ii. **Add Reason Code Note:** Some Reason Codes require an additional field called Add Reason Code Note to be completed. Enter a free form note to support the chosen reason code(s). **Please note:** The added reason code note will be saved with all selected reason codes that require a free text note.

8. Click **Save** and **Yes** to confirm

The punch appears in the employee's entries list with a status of Unverified. The employee must verify the punch, which updates the status to Pending. The supervisor may then review and approve the pending entry.

Edit a Punch for an Employee

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter the employee's name in the Employee Name field then click **Search**
5. Click anywhere on the row to open the employee details page
6. Select the **Entries** tab located below the demographics box
7. Click anywhere in the row to open the punch details page
8. Click **Actions**
9. Select **Edit Entry** from the drop-down menu
10. Make the necessary changes on the Entry Form wizard
11. If the organization requires a reason code when editing a punch, select a reason(s) from the **Add Reason Codes** drop-down that best describes why the edit is being made. Multiple reason codes may be selected simultaneously.
12. Reason codes may require a text explanation. If this requirement is selected, complete the **Add Reason Code Note** field. The added reason code note will be saved with all selected reason codes that require a free text note.
13. Click **Save** and **Yes** to confirm

An edited *pending* punch will change to rejected status and a new punch with unverified status is generated with the corrections. The Ref field is assigned a number that references the original punch, indicating the punch has been modified. The employee must log in to DCI and verify (acknowledge and concur with) the change(s), which updates the status to Pending. The supervisor must now review and approve the punch. Once approved, the approved or rejected entry will disappear from the Pending Entries screen and be visible under Entries for the program, or individually under Entries for the employee or client.

An edited *approved* punch will maintain the status of approved but will reflect a Compensated flag. Two new punches are created and need to be approved; one that zeroes out the original entry, and one for the correct entry. These entries can be found on Pending Entries on the submenu or in the reference entries table on the original entry's punch entry details page. The Ref field is assigned a number that references the original punch, indicating the punch has been modified.

Cancel a Punch for an Employee

1. Log in to DCI with personal profile
2. Click **Home** on the main menu

3. Click **Employees** on the submenu
4. Enter the employee's name in the Employee Name field then click **Search**
5. Click anywhere on the row to open the employee details page
6. Select the **Entries** tab located below the demographics box
7. Click anywhere in the row to open the punch details page
8. Click **Actions**
9. Select **Cancel Entry** from the drop-down menu to open the Cancel Entry form
10. If the organization requires a reason code when canceling a punch, select a reason(s) from the **Add Reason Codes** drop-down that best describes why the entry is being canceled. Multiple reason codes may be selected simultaneously.
11. Reason codes may require a text explanation. If this requirement is selected, complete the **Add Reason Code Note** field. The added reason code note will be saved with all selected reason codes that require a free text note.
12. Click **Save** and **Yes** to confirm

The updated employee punch remains in Approved/Processed/Paid status but will reflect a Compensated flag. A new entry zeroing out the original has been created. The Ref field is assigned a number that references the original punch indicating the punch has been modified.

Verify an Unverified Punch for an Employee

Description: As an alternate option to the employee verifying an unverified punch, some organizations may allow a supervisor to verify (or reject) the punch from the punch details screen on behalf of the employee.

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter the employee's name in the Employee Name field then click **Search**
5. Click anywhere on the row to open the employee details page
6. Select the **Entries** tab located below the demographics box
7. Click anywhere in the row to open the punch details page
8. In the Punch Details widget box, select either the **Verify** or **Reject** button by the Status field
9. Click **Yes** to confirm

Manage Accrued Time Entries (FI Mode Only)

The accrued time entry feature allows employees to claim paid time off against an hourly authorization. DCI does not manage the accrual of paid time off; however, an accrued time off balance can be deposited into an hourly authorization and employees can deduct from this balance. Accrued time entries allows the client if authorized to pay their employee (s) for time off. This feature is only for **unit-based authorizations**.

Set-Up
1. Submit a support ticket to enable the instance-level setting called Features_FIModeAccruedTime_IsEnabled
2. Create a service code
    a. Account Type = Hourly
    b. Funding Type = Units
    c. Allow Accrued Time Entries = Yes
        i. Select an Accrued Time Pay Code (pay code that will appear on the payroll for accrued time entries associated with this service code)
        ii. Please Note: It is possible to use this service code for both accrued time off and hourly services if needed (i.e., Client receives one authorization to cover both)
3. Create client profile if not already created
4. Create employee profile if not already created
5. Create a client funding account for the service code
6. Create and approve an authorization for the funding account
7. Create an employee service account for the employee and funding account
8. Use the Accrued Time Adjustment Entries import to add a balance to the employee service account created above
    a. Import > Entries > Accrued Time Adjustment Entries
    b. Please Note: Unlike authorizations, accrued time balances are always hours as a decimal, regardless of the service code settings for units/rounding.

Create an Accrued Time Entry

Accrued Time Entries can be created by the employee in the web portal and mobile web, but not in the mobile app because the entries are historical. Accrued Time Entries can also be created on behalf of the employee by Super Users, Supervisors, and Employers via the web portal.

1. Log into the web portal
2. Navigate to the Add New Entry form wizard
    a. Home > Employees > search and select > Actions > New Entry
3. Complete the form as follows:
    a. Entry Type: Accrued Time Off
    b. Account Type: Hourly
    c. Client: Type and select the client name
    d. Service Code: Select the service code that was created in the set-up
    e. Service Date: The date for which the employee is claiming paid time off
    f. Amount: The time in hours the employee is seeking to claim. Must be a whole integer no more than two digits with an optional one or two-digit decimal (i.e., 10.25).
    g. ***Complete all other fields as normal***
4. Click **Save** and **Yes** to confirm. An Accrued Time Off entry has now been created.

Accrued Time Entry Business Rule

The system runs relevant business rules, including the Accrued Time Entry Business Rule, if enabled.

- This business rule operates just like the Authorization Remaining Balance business rule except that it validates against the balance on the employee service account rather than the authorization
- Its purpose is to provide the ability to confirm if the employee submitting an accrued time entry has enough balance to cover their request
- This is a phase 1 business rule, meaning it occurs when the employee saves the entry.
- If the entry fails the business rule, the employee will see an alert when saving.

Enable the Accrued Time Entry Business Rule

1. Log in to web portal
2. Select **Settings** from the main menu
3. Select **Funding Sources** from the submenu
4. Use filters to enter parameters and click **Search**
5. Clink anywhere in the selected funding source row to view details page
6. Scroll down and click the **Service Code** tab
7. Use filters to locate a specific service code
8. Click anywhere in the service code row to view details page
9. Scroll down and click the **Business Rules** tab to display the business rule table
10. Select the **Accrued Time Entry Business Rule** to open the details page
11. Click **Actions**
12. Select **Edit Business Rule**
13. Click the **Enable Checkbox**
14. Click **Save** and **Yes** to confirm