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Staff Hours to Grants

This feature will allow you to assign hours worked by your staff to specified grants. Please follow these steps to setup and work with this procedure.

1. Organization Information – Grants tab
 - a. Add any grants on this screen to which you would like to assign staff hours
 - b. Click on the Add Grant button and fill in the information
 - c. Click on the Modify Grant Info if you need to change the information
2. Staff/Volunteers – Time Cards tab
 - a. Click the *Allocate Time Cards to Grants/Funding Sources* button bottom right
 - b. Click the *Set Allocation Rules* button – here you will assign an Allocation Rule for each staff person in your database based on a percentage of total hours worked for the pay period
 - i. Choose a staff person from the dropdown
 - ii. Choose a Grant/Funding Source from the first dropdown
 - iii. Fill in a % of Hours to Allocate
 - iv. Continue filling in the Allocation Rules for each staff person accordingly

NOTE: You cannot allocate more than 100% of any staff person's hours

Grant/Funding Source Allocation Rules

These Rules are meant to be the "default" percentage of hours to allocate to a specific Grant/Funding Source. They will be applied when you use the "Automatically Allocate Time Card Records based on Rules" procedure.

When you use that Automatic Allocation, each separate Time Card record will be split according to the Rules specified below. If needed, you may then adjust the actual allocations by clicking on "View/Modify Detailed Time Card Allocations".

☐ Show Active Staff Only Unit: All Units (That you have permissions for)

Grant/Funding Source Allocation Rules for: Dommer, Nicole

☐ Only Show Active Grants/Funding Sources Below (If an Inactive Grant has allocations here, it will show blank)

Grant/Funding Source:	% of Hrs to Allocate
▶ OJP	20 %
YOST	15 %
*	%

Remove All Existing Rules for This Staff Person

Current Total Allocation: 35 %

Close

3. Staff Hours – your staff will check in and out each day as they come and go
4. At the end of each payroll cycle you will run the Retrieve & Build Time Cards procedure to bring in the time card data from the Quick Entry section
5. Staff/Volunteers – Time Cards tab
 - a. Click the *Allocate Time Cards to Grants/Funding Sources* button

- b. Click the *Automatically Allocate Time Card Records Based on Rules*
- c. Choose from All Staff, Staff for a Unit or a Specific Staff person
- d. Choose from
 - i. Automatically create Time Card Allocation records for Staff who do not yet have allocations for specific Time Card records in this pay period (**MOST COMMON**)
 - ii. Rebuild ALL Time Card Allocations for Staff with time card records in this pay period
 - iii. DELETE All Allocations for selected Staff
- e. Click Continue with Time Card Allocation
- f. Click OK at the Grant/Funding Source Allocations complete message

Allocate Timecard Records to Grants/Funding Sources

You are about to allocate time card entries for the pay period 04/18/2021 through 05/01/2021 to Grants/Funding Sources based on the Staff Members' Grant/Funding Sources Allocation Rules.

This is not the same as Retrieving and Building Time Cards! Once Time Cards have been built, you may use this procedure to allocate Staff time to various Grants/Funding Sources you have set up in Organization Information.

Staff/Volunteer Selection

☒ All Staff/Volunteers

☐ Staff/Volunteers for Unit: 01 - Main Club

☐ Specific Staff/Volunteer: Dommer, Nicole

☒ Do NOT Allocate any Hours to Grants/Funding Sources Currently Designated "Inactive"

Choose a Time Card Allocation Method

☒ Automatically create Time Card Allocation records for Staff who do not yet have allocations for specific Time Card records in this pay period (based on the Staff Member's Allocation Rules)
This method does not delete or modify any current allocations.

☐ Rebuild ALL Time Card Allocations for Staff with time card records in this pay period (based on the Staff Member's Allocation Rules)
This method DELETES all existing Time Card Allocations and rebuilds them.

☐ DELETE All Allocations for selected staff. Do NOT create any new allocations.
This method DELETES all existing Time Card Allocations and does NOT rebuild them.

Continue with Time Card Allocation

Return to Main Allocation Screen

2. Click the *View/Modify Detailed Time Card Allocations* button – this screen allows you to view and adjust a staff persons allocations. You can adjust the amount of time allocated in any of the Grant columns.

Time Card Record Allocations

Grant/Funding Source Allocations for Pay Period 04/18/2021 - 05/01/2021 Dommer, Nicole

Note: List only shows Staff who have Time Card Records during the Pay Period shown above.

☐ Hide Inactive Grants with no time allocation.

Dt Wkd	Time Type	In	Out	Adjust	Ttl Wkd	Ttl Allocated	Exceeds	OJP	YOST
04/20/21		10:10 A	7:47 P	0	9.62	3.37		1.924	1.443
04/21/21		9:44 A	7:16 P	0	9.53	3.34		1.906	1.4295
04/22/21		1:03 P	9:06 P	0	8.05	2.82		1.61	1.2075
04/23/21		9:22 A	7:01 P	0	9.65	3.38		1.93	1.4475
04/26/21		9:48 A	7:18 P	0	9.5	3.32		1.9	1.425
04/27/21		8:55 A	7:06 P	0	10.18	3.56		2.036	1.527

Record: 1 of 6

Grant/Funding Source Abbreviations are being used where available. Inactive Funding Sources are preceded with "(Inact)".

Close

- Click the *View Summary of Time Card Allocations* button – this allows you to view a summary of each Staff persons total hours allocated in the pay period

Time Allocated

Below is a summary of the Time Card hours allocated to Grant/Funding Sources for Pay Period 04/18/2021 - 05/01/2021 for:

Show Summary By: ☒ Staff Person ☐ Grant

Dommer, Nicole

You may not change the values here. If you want to modify the Time Card Allocations for this Pay Period, you must change the individual Time Card allocations.

Grant/Funding Source	Ttl Hrs Allocated This Pay Period
OJP	11.306
YOST	8.4795

Ttl Hrs Worked This Pay Period: 56.53
Ttl Hrs Allocated This Pay Period: 19.79

Close

- Click the *Grants / Funding Sources Time Card Allocations Report* button – this allows you to preview, print and export to Excel a variety of report choices.

Staff/Volunteer Grants/Funding Source Allocations

Configuration: Standard Change Name Add New Delete Open Staff Filter Close Filter Filter is OFF

Pay Period: 04/18/2021 to: 05/01/2021 Primary Configuration

Grant(s) to Show

☒ All Current Grants (not deleted)

☐ Specific Grant(s):

OJP
YOST

Report Grouping

☐ Entire Organization

☒ Page Break by Unit

☐ Page Break by Staff Member

☐ Page Break by Grant

Detail Level

☒ Summary by Staff/Pay Period

☐ Show Detail by Time Card Record

☐ Summary by Grant/Pay Period

Report Subtitle (optional):

Make Menu Favorite Preview Print Export to Excel Close Close to Main Menu

Vision Staff Check In

Staff/Volunteers Grants/Funding Sources Time Card Allocation

04/18/2021 to 5/1/2021

Unit: Main Club

Staff	Unit	Position	Grant/Funding Source	Hrs Allocated
Dommer, Michael	01	President	OJP	4.41
Dommer, Michael	01	President	YOST	4.41
Dommer, Nicole	01	Vice President	OJP	11.31
Dommer, Nicole	01	Vice President	YOST	8.48
Total Hours Allocated:				28.606

Please contact Vision Computer Programming Services, Inc. at 888-425-6964 if you have additional questions regarding this feature.