

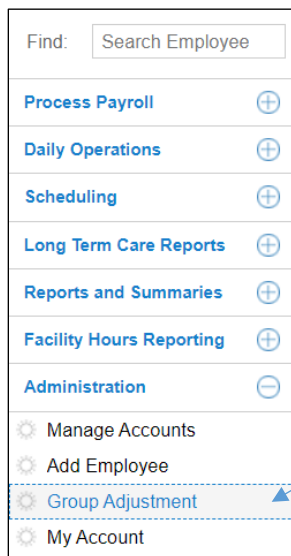
# MSS: Group Adjustments

The group adjustment tool in Manager Self Service (MSS) lets you apply a change to time cards, schedules and benefits for a group of employees without having to access the record for each employee. The type of change can be selected and defined, as well as the group of employees who will receive the change. Once the group adjustments has been applied, it can only be removed by accessing the individual employee time cards.

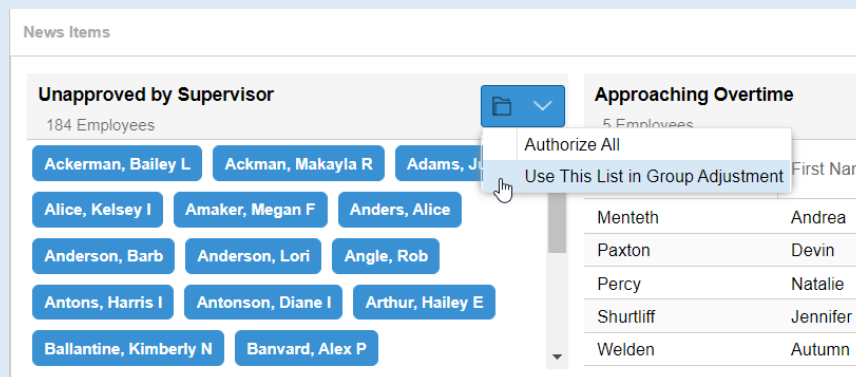
## Accessing the Group Adjustment Tool

To open the group adjustment tool, click the Group Adjustment menu item.

The menu group and menu items can be customized for each system. The names of the menu groups and menu items in your system may not match those in the following examples, which display the system default names. If you are not able to locate a group menu item, contact your support for assistance.



The Group Adjustment window can also be accessed from some the of the news items in the Dashboard. Click the down-arrow button for the news item and select Use This List in Group Adjustment.



**Note:** Regardless of which News Item is selected, the initial group adjustments window will default to “Add a New Punch”. Be sure to select the intended group adjustment type before clicking Apply Adjustment.

Click the **Change Type of Adjustment** button in the *Group Adjustments* window.

The screenshot shows the 'Group Adjustments' window. At the top, there are two buttons: 'Change Type of Adjustment' and 'Apply Adjustment'. Below these is the heading 'Add a New Punch' and a sub-heading 'Add Transaction at 03/18/21 8:00'. The main area contains several input fields: 'Date' (03/18/2021), 'Time' (8:00), 'Reason Code' ([no reason given]), 'Skip if Punch Exists Within' (checkbox), 'Between Date' (03/18/2021) with 'Time' (19:53), and 'And Date' (03/18/2021) with 'Time' (17:00). On the right, there is a 'Filter Properties' section with a 'Base Filter' set to 'Active Employees' and a table with columns 'Delete', 'Location', and 'Unit'. The table contains one row with a delete icon, 'All/Home', and 'All/Home'. A blue arrow points to the 'Change Type of Adjustment' button.

The types of group adjustments that you can make are listed in the Adjustment Type panel.

This screenshot shows the 'Group Adjustments' window with the 'Adjustment Type' panel open on the left. The panel lists three options: 'Add a New Punch' (with a description: 'Add a punch transaction to an employee's time card if they don't already have a transaction in the time frame provided.'), 'Remove a Punch (in Range)' (with a description: 'Remove an existing punch transaction from an employee's time card if a transaction is present in the time frame provided.'), and 'Credit Hours' (with a description: 'Credit Hours against a selected Pay Designation.'). A blue arrow points to the 'Adjustment Type panel' label. The main window area on the right is partially visible, showing the same input fields as the previous screenshot. A blue arrow points to the 'Adjustment Type panel' label.

## Using the Group Adjustment Tool

Select the adjustment type from the panel. For each adjustment type there are three general areas that are defined:

- the details of the adjustment (time, date, rules and reasons)
- filters for refining the workgroup
- selection of individual employees to receive the adjustment.

The screenshot shows the 'Group Adjustments' interface. At the top left, there are buttons for 'Change Type of Adjustment' and 'Apply Adjustment'. Below these is the 'Add a New Punch' section, which includes fields for Date (03/18/2021), Time (8:00), Reason Code (no reason given), and a checkbox for 'Skip if Punch Exists Within:'. There are also fields for 'Between Date' and 'And Date' with associated times (19:53 and 17:00). In the center, the 'Filter Properties' section shows a 'Base Filter' set to 'Active Employees' and a table with columns for 'Delete', 'Location', 'Unit', and 'Floor'. The table contains one row with 'All/Home' in all three columns. To the right, the 'Adjust Those to Include' panel shows a list of employees: Aston\_Xavier U (206), Barwick\_Joshua I (104), Beckley\_Nathan S (818), and Belden\_Katelyn S (600). Each employee entry has a star rating and a remove icon. Three blue arrows point from the bottom of the image to the 'Add a New Punch' section (labeled 'Adjustment details'), the 'Filter Properties' table (labeled 'Workgroup filter'), and the 'Adjust Those to Include' list (labeled 'Select employees').

## Adjustment Details

The adjustment details include the date a time card or schedule change will take place. The time of an added punch or start/end of an added schedule is entered. An explanation for the adjustment can be added to the employee record by selecting a reason code from the drop-down list. Some adjustments have additional rules that can be applied, such as creating a timeframe during which a new punch cannot be added if a punch already exists.

### Add a New Punch

Date:

Time:

Reason Code:

Skip if Punch Exists Within:

Between Date:  Time:

And Date:  Time:

### Add Work Schedule

Date:

Start Time:

End Time:

Reason Code:

- [no reason given]
- TDY - Excused
- TDY - Unexcused
- LFE - Excused
- LFE - Unexcused
- ABS - Excused
- ABS - Unexcused
- ABS - Consecutive Days
- ABS - No Call No Show
- Pnd FMLA
- Supervisor Call Back

## Workgroup Filter

The group of employees who will receive an adjustment can be filtered on two levels. First the workgroup can be selected using the workgroup level drop-down lists. The selected workgroup can be refined by adding the base filter, which lets you select a specific group of employees within the workgroup, such as employees currently working or employees absent today.

Filter Properties

Base Filter:

Select employees to filter above and below:

- Active Employees
- Terminated Employees
- All Employees
- Employees Currently Working
- Employees Absent Today
- Employees Absent Yesterday
- Employees Missing Punches Today
- Employees Missing Punches Yesterday
- Employees Scheduled to be Absent Today
- Employees without Schedules Today
- Approaching Overtime
- Employees With Hours
- Mv Crew


Filter Properties

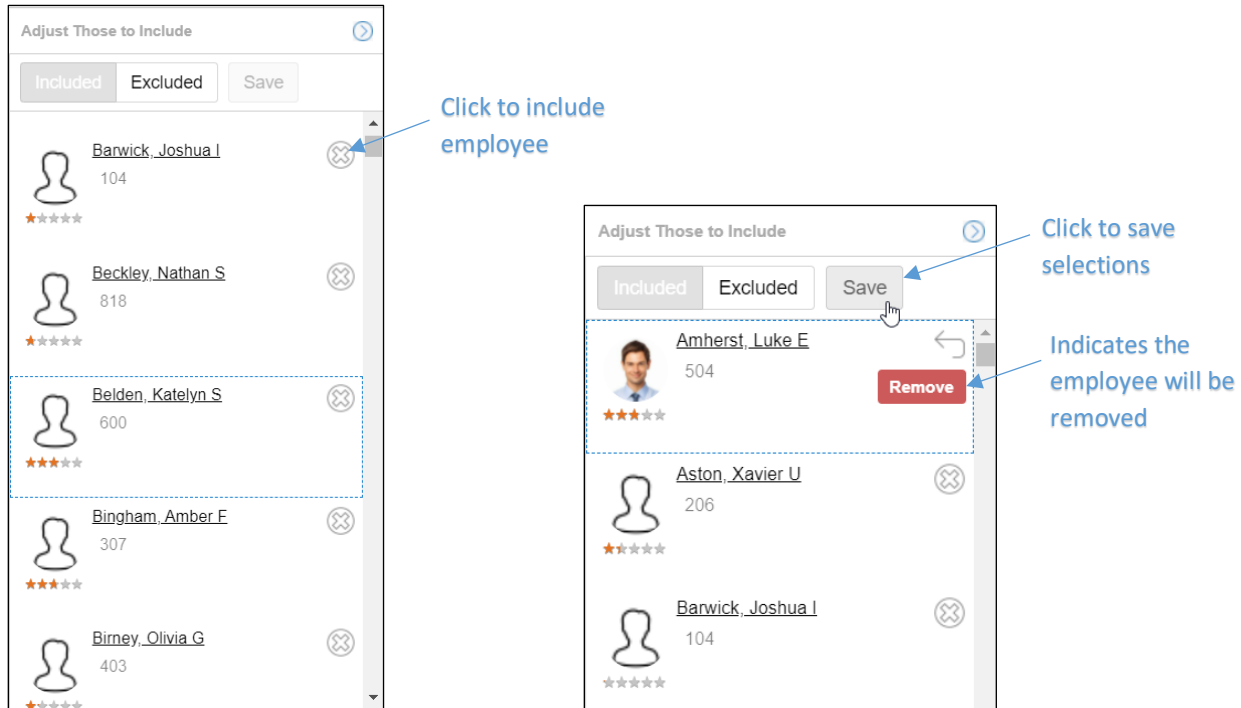
Base Filter:

Select employees to receive this adjustment by defining the filter above and workgroup assignments below.

Delete	Location	Unit	Floor	Pos
<input checked="" type="checkbox"/>	All/Home	Skilled Nursing	2FL	All/
			All/Home	
			1FL	
			2FL	
			3FL	
			4FL	

## Selecting Individual Employees


The Adjust Those to Include panel lists the employees in the group you have defined using the base and workgroup filters. You can further filter the group by selecting individual employees to exclude. To remove an employee from the list, click the  icon. The employee tile will be tagged with a Remove banner. Click the **Save** button to remove the employee.

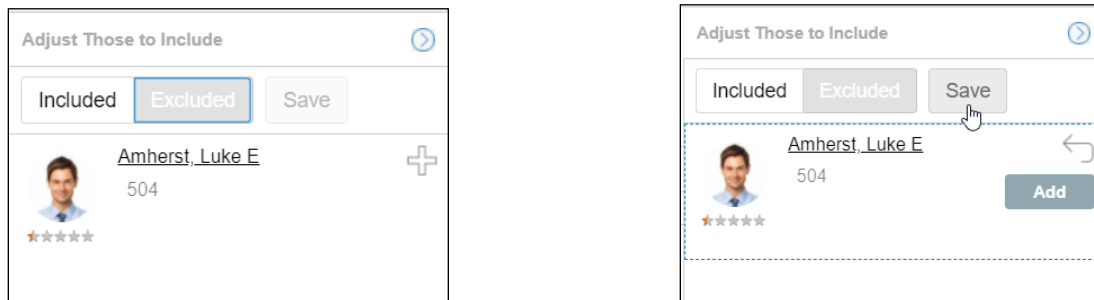


Click to include employee

Click to save selections

Indicates the employee will be removed

Click the **Excluded** button to view the employees who have been removed from the group. Click the  icon to add the employee back to the group. The employee tile will be tagged with an Add banner. Click the **Save** button to add the employee.



Indicates the employee will be added

## Add/Remove a Punch

These adjustments let you add a new punch and remove a punch from multiple employee time cards for a specific date or date range and time. Add a reason code to explain the adjustment if an appropriate one is available in your system. If one or more employee time cards in your group already have a punch for the date and time selected, you can prevent the Add a New Punch group adjustment from adding a punch to those time cards by selecting a specific date/time range around the punch and enabling the Skip if Punch Exists Within option. The group punch will not be added to time cards in the date and time range selected.

Change Type of Adjustment    Apply Adjustment

### Add a New Punch

*Add Tr  
betwee*

Date:

Time:

Reason Code:

Skip if Punch Exists Within:

Between Date:   Time:

And Date:   Time:

Change Type of Adjustment    Apply Adjustment

### Remove a Punch (in Range)

*Remov  
19:00*

Between Date:   Time:

And Date:   Time:

Reason Code:

## Credit Hours/Dollars

The credit hours and dollars feature lets you specify the number of hours or dollar amount you want to credit to the time cards for your selected group of employees. Select the date you want to apply the credit and a pay designation, such as overtime, regular or tips, to assign to the amount of hours or dollars. Add a reason code to explain the adjustment if an appropriate one is available in your system.

Change Type of Adjustment    Apply Adjustment

### Credit Hours

Effective On:

Pay Designation:

Hours:

Reason Code:

Change Type of Adjustment    Apply Adjustment

### Credit Dollars

Effective On:

Pay Designation:

Dollars:

Reason Code:

### Authorize Period Time Card

To authorize time cards for a group of employees select the pay period and enable the Lock Time Card checkbox to lock time cards after approval.

Note: Be careful when using the Authorize Period Time Card adjustment as time cards may have issues that require individual review and attention.

Group Adjustments

Change Type of Adjustment    Apply Adjustment

### Authorize Period Time Card

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Pay Period:                      Previous Period    ▾

Lock Time Card:

### Add/Remove Work Schedule

Add a work schedule by selecting the date and entering the start and end times. In the Remove Work Schedule adjustment, select the date of the schedule you are removing. Add a reason code to explain the adjustment if an appropriate one is available in your system.

Group Adjustments

Change Type of Adjustment    Apply Adjustment

### Add Work Schedule

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Date:                      03/18/2021   

Start Time:                      19:53

End Time:                      17:00

Reason Code:                      Supervisor Call Back    ▾

Group Adjustments

Change Type of Adjustment    Apply Adjustment

### Remove Work Schedule

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Effective On:                      03/18/2021   

Reason Code:                      Supervisor Call Back    ▾


## Workgroup Transfer

To transfer a group of employees to a new workgroup, select the date and time the transfer will take place. Select the workgroup levels of the workgroup the employees are transferring to using the drop-down lists. Add a reason code to explain the adjustment if an appropriate one is available in your system.


**Group Adjustments**


Change Type of Adjustment    Apply Adjustment


### Workgroup Transfer


Transfer On Date: 11/20/2018 


Time: 8:00


Division: All/Home 


Department: All/Home 


Position: All/Home 

Facility: All/Home 

Wing: All/Home 

WG 6: All/Home 


WG 7: All/Home 


Reason Code: [no reason given] 

## Set/Credit/Debit PTO (Benefit Bank) Balance


Credit or Debit a group of employees' benefit balances by selecting the benefit bank (PTO, Vacation, Sick, FMLA, etc.), the number of hours you want to credit/debit the balance and the date on which you want the change to occur. Setting a PTO (Benefit Bank) balance will reset an existing benefit balance in the employees' time cards to the amount you enter in the *Hours* field on the date selected. Add a reason code to explain the adjustment if an appropriate one is available in your system.

### Credit PTO (Benefit Bank) Balance


Benefit Bank: Vacation 


Effective On: 11/24/2017 

Hours: 8:00


Reason Code: [no reason given] 

### Debit PTO (Benefit Bank) Balance

Benefit Bank: Sick 

Effective On: 11/24/2017 

Hours: 2:00

Reason Code: [no reason given] 



### Set PTO (Benefit Bank) Balance

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Benefit Bank:

Effective On:

Hours:

Reason Code:

### Special Edit

Special edit lets you adjust an employee's pay to

- A scheduled start or end time without changing worked punches. Paying to Schedule or Actual Time should only be used when you are not paying what the employee actually punched.
- An actual start or end time when an employee has performed work before or after their punch time. Punches for worked time are not changed.

**Note:** Use these edits with caution when they result in paying less than recorded hours as they may be a violation of employment law.

Select the time and date for applying the pay. Add a reason code to explain the adjustment if an appropriate one is available in your system.

Change Type of Adjustment
Apply Adjustment

### Special Edit

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Effective On Date:

Time:

Special Edit:

Reason Code:

## Send a Message

Send a message to selected employees by typing email content in the *Message* field. Add a subject and select a priority (normal/medium/high) tag for the email. Enable the message to be sent as an email, mobile app push message or text message.

**Group Adjustments**

Change Type of Adjustment    Apply Adjustment

### Send Message

Subject:

Message:

Priority:

Send to Email Address on File:

Send to Mobile Application as Push Message:

Send to Phone Number on File as Text Message:

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