

EDIT HISTORICAL PBJ HOURS

You can edit historical PBJ hours for CMS reporting. An example of where this can be useful is if a universal care worker forgot to transfer to the CAN job and it was not corrected before the pay period was archived.

The steps below will show how to edit an employee's historical PBJ hours.

- 1. Navigate to an employee and select their History Page.
- 2. Select Edit Historical Hours, this name may vary.
- 3. Select the month changes are needed
- 4. Choose Payroll Based Journal hours.

1	2	3 4				
History V Edit Hi	torical Hours 🗸 January	2022 V Payroll Based	Journal 🤟 Rebuild			
Last Name F	irst Name MI ID	Badge De	partment Lur	ch Hin	ed	
Smith D	ebra 561	4006402 Nu	rsing- CNA Lur	ich 30 05/	27/83	
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	+	+	+	+	+	
2 Janua	y 3 January	4 January	5 January	6 January	7 January	8 January
+	Regular 6.75	Regular 6.75	Regular 7.00	Regular 7.50	Regular 7.00	Regular 1.50
	Shift2 5 1.00	Shift2 5 1.00	Shift2 5 0.50	Shift2 5 0.50	Shift2 5 0.50	Overtime 6.00
						RH#307 5 1.00

- 5. PBJ Hours will display on each day.
- 6. Make your edit. (Edits Listed Below)
- 7. Rebulid the Totals. (Pg.3)

Change the Pay Designation

If you need to change an existing record, click on the hours on the appropriate day and the Adjust Historical Hours screen will appear. Editing PBJ hours will not affect standard "Payroll" hours.

Properties			Workgroup		
Date:	01/06/2022		Department:	Nursing- CNA	~
Pay Designation:	Regular	~	Zone:	Zone A	~
Hours:	9.00		Unused:	Default	~
Rate:	17.5100	Lookup			
Reason Code:	[no reason given]	\sim			
Notes:					
					Ok Cance
6	January	6		January	Ok Canc
6 Regular	January 7.50	6	Regular 🚫	January 7.50	Ok Canc

Shift2

0.50

Field	Description
Date	Defaults to the day
	selected
Pay Designation	Pay Designation the hours
	go to.
Hours	Adjust hours, if needed
Rate	Rate of pay applied.
Reason Code	Select Reason Code
Notes:	Type in notes.
Workgroup	Workgroup the hours are
	applied to.

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Add a new record

If you need to add hours on a day you can choose the Plus (+) on the appropriate day then select Credit Historical Hours.

Fill in the Appropriate Pay Designation, Hours, and the Workgroup.

2		January	3		Credit Histo	rical Hours							\otimes
			2		- Properties						Workgroup		
	+ .			Regular	Date:		01/10/20)22			Department:	Nursing- CNA	~
6		Credit	Hist	orical Hours	Pay Desig	nation:	Regular		~		Zone:	Zone A	~
	-	Add N	oto		Hours:		3.00				Unused:	Default	~
		Add N	ore		Rate:		17.5100		Lookup				
		Condit	tions	on Day	Reason Co	ode:	[no reas	son g	given]				
			_		Notes:								
												Ok	Cancel
				10	Januar	У		1	0	Jan	uary		
				Regul	lar 7.50				Regular	7.50			
				Shift2	\$ 0.50				Regular	3.00	T		
						-	-						
					+				Shift2 \$	0.50			
									+				

Cancel or Remove an Edit

- 1. Click on the **Adjustments** panel on the bottom of the screen to expand
- 2. Click the **Trashcan** next to the Edit that you want to delete
- 3. Select Remove or Cancel Historical Adjustment

2	January	3			Januar	y	4		January	4	5		January	6			January	7			Janu	ary	8			January
	+		Regula	ır	6.75		Regu	lar	6.75		Regular	r	7.00		Regular	0	7.50		Regular		7.00] [Regular		1.50
			Shift2	\$	1.00		Shift2	\$	1.00		Shift2	\$	0.50		Regular		9.00		Shift2	\$	0.50		ſ	Overtime		6.00
				+				+				+			Shift2		0.50			+				Shift2OT	\$	1.00
																+									+	
9	January	10			Januar	У	11		January		12		January	1	3		January	1	4		Janu	ary	15	;		January
	+	ſ	Regula	ır	7.50		Requ	lar	6.75		Regular	r	6.75		Regular		6.75		Regular		7.50	1			+	
Ad	justments																									
	Timestamp		Ac	count				Eff	ective		Descriptio	n														
	03/02/2022 04:16pm	Ø	Ca	rcel His	torical Ad	ustr	ment	01/0	06/2022	(Chg Abs D	es Hist	REG 9.00													
	03/02/2022 04:18pm	Ľ	Re	move H	istorical A	djus	tment	01/0	06/2022	,	Add Abs D	les Hist	S2 0.50													
	03/02/2022 04:44pm	12	US	ER				01/1	10/2022	,	Add Abs D	es Hist	REG 3.00													
		-																								



Rebuild Totals

It's important to REBUILD hours after you've adjusted Historical Hours.

1. After PBJ hours have been adjusted, click the REBUILD button at the top of the screen

Austen, Kate P (Production-M	ain Press)						
History 🗸	Edit Histo	rical Hours ${\scriptstyle \lor}$	April 20	21 V Pa	ayroll Based Jou	rnal 🗸 Rebu	ild	
Last Name	Firs	t Name ID		Badge	Location	De untinent		J
Austen	Kate	e 100	00	1000	Detroit	Production		Ν
Sun	day	Мо	nday		Tuesday	Wedne	sday	
28	March	29	March	30	March	31	March	1
+		+			+	+		

2. Select the pay period that includes the day(s) you adjusted. And click OK.

Recompute	Abs Des Histor	гу	\otimes
- Properties			
From:		From 02/20/22 to 03/05/22	\sim
		From 02/20/22 to 03/05/22	^
		From 02/06/22 to 02/19/22	
		From 01/23/22 to 02/05/22	
		From 01/09/22 to 01/22/22	
		From 12/26/21 to 01/08/22	
		From 12/12/21 to 12/25/21	
		From 11/28/21 to 12/11/21	
		From 11/14/21 to 11/27/21	
		From 10/31/21 to 11/13/21	
		From 10/17/21 to 10/30/21	
		From 10/03/21 to 10/16/21	Janu
Regular	6.75	From 09/19/21 to 10/02/21	1.00
		Erom 00/0E/21 to 00/19/21	▼ 100



Historical Preferences

Preferences allow you to customize the display of the Payroll Based Journal view. Preferences are useful for comparing standard hours and PBJ hours to verify that the hours are entered as intended for proper CMS submission.

Preference	Description	
Presentation	Standard: One type of historical hours displays at a time	30DecemberRegular6.50Shift2\$ 1.00
	Include Secondary: Display two sets of hours, for example Payroll Based Journal and Standard at the same time. The type of hours indicated by the current view are displayed first.	30DecemberRegular6.50Shift2\$Regular6.50Shift2\$1.00
Coverage	Shift: Displays a bar at the bottom of calendar to represent the time of the s This is useful when shifts cross midni help understand why PBJ hours are of from standard payroll historical hours	the shift. ght to different
Totals	Pay Des Hours: Display a totals column of each Pay Designation at the end of each weekly row. Workgroup Hours: Display a totals column of each Workgroup at the end of each weekly row.	REG 36.50 S2 4.00 OT 6.00 2OT 1.00 Nursing- CNA 31.25 Nursing - LPN 7.50
Workgroup Rendering	Choose which Workgroup Level you want to display and choose to display the name or number.	Workgroup Levels Image: Constraint of the second

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