

# Historical Edits – Instructions

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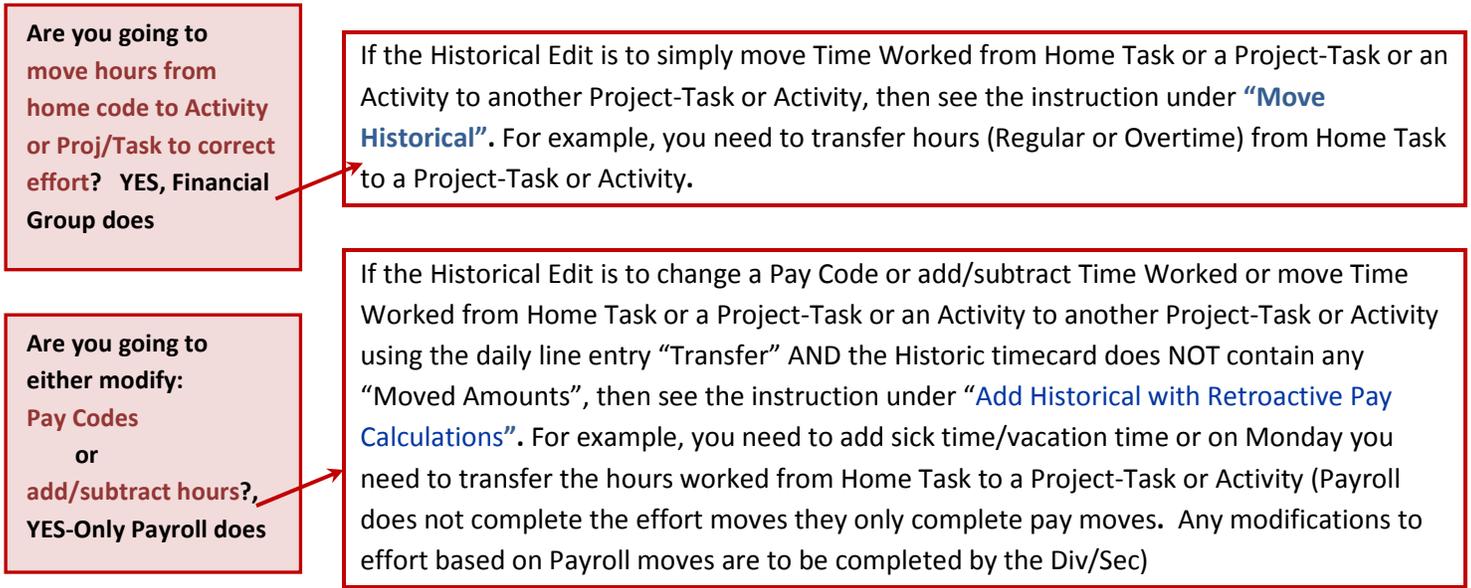
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## Overview

This document describes only how you can make a Historical Edit. The Fermilab policies governing the Historical Edits are described in a separate document.

A Historical Edit is any change done on an employee’s timecard after payroll has signed-off. Only authorized employees can perform Historical Edits. Historical Edits show on the employee’s “Current Pay Period” timecard. An employee or an approver can see Historical Edits but can not delete them, only authorized employees can. Historical Edits are processed the same way and at the same time that the “Current Pay Period” timecard entries are.

It is important to know ahead of time what type of changes are to be made as different Kronos application selections are invoked. Use the following diagram to determine the appropriate selection:



## Move Historical

From the “QuickFind” Genie or Timekeeping → Pay Period Close select the employee and the Time Period that changes are to be applied and either double click on the selection or press the “Timecard” link:

Press to access timecard

Double click to access timecard

Green-Yellow

GENERAL MY GENIES@ TIMEKEEPING SCHEDULING MY INFORMATION

Timecard Schedule People Reports

QUICKFIND

Last Refreshed: 10:39

Name or ID  Find

Time Period Current Pay Period

Actions	Punch	Amount
Name	ID	
NORMAN, ANDREW J	15427N	
O'BOYLE, LUANN	04858N	
OLEYNIK, GENE A	07804N	
ONOPRIENKO, DMITRY V	15317N	
ORMES, JASON E	12811N	
PARA, ADAM	07125N	
PARK, CHONG S	15423N	
PASETES, RAMON C	11673N	
PATERNO, MARC F	12383N	
PAVLICEK, FRANK V	11260N	
PAVNICA, AMY L	10683N	

When the timecard is displayed, make sure that the time period is correct. If not change it to the appropriate one.

To only move time from Home Task or Project-Task or Activity to another one on the timecard, follow the link “Amount → Move Historical”

Green-Yellow

GENERAL MY GENIES@ TIMEKEEPING SCHEDULING MY INFORMATION

Timecard Schedule People Reports

TIMECARD

Loaded: 10:52

Name & ID O'BOYLE, LUANN 04858N

Time Period 5/17/2010 - 5/23/2010, Range of Dates

Save	Actions	Punch	Amount	Accruals	Comment	Approvals	Reports
Date				In			Transfer
Sun 5/16			Move →				
			Delete Moved →				
Mon 5/17			Add Historical →	8:30			
Tue 5/18			Add Historical with Retroactive Pay Calculation →	8:30			
Wed 5/19			Move Historical →	8:30			
Thu 5/20			Delete Historical →	8:30			
Fri 5/21				8:30			
Sat 5/22							
Sun 5/23							

Select Pay Code.  
**Default entry is WRONG- always make sure Pay codes MATCH!!**

Select the Project-Task or Activity or leave it blank for Home Task to transfer hours from

Enter hours to be transferred

**VERY IMPORTANT: No changes will be sent to Project Accounting unless you check the "Include in totals for effective date" checkbox**

**IMPORTANT: The effective date should be today's date (default value)**

The Historical Date should be the Friday of the Historical Edit pay period

Enter Project-Task or Activity that the indicated hours are to be transferred to

Only Payroll should use the Impact Accruals checkbox.

Save the changes

Add comments via 'Historical Move'

After saving the historical edits, the timecard displayed reflects the changes:

The screenshot displays the Fermilab Timecard interface. At the top, there are navigation tabs: GENERAL, MY GENIES, TIMEKEEPING, SCHEDULING, MY INFORMATION, and DATA INTEGRATION. The main header shows 'TIMECARD' for employee 'PISCHALNIKOVA, I.' with ID '11987N' and a time period of '5/17/2010 - 5/23/2010, Range of Dates'. Below this is a table with columns: Date, Pay Code, Amount, In, Transfer, Out, In, Transfer, Out, Shift, Daily, and Cumulative. A red oval highlights the entry for 'Fri 5/21' with 'Regular - Weekly' pay code, an amount of '16.0', and a comment '...A-45A.12.01.3.11.//'. Below the table is a 'TOTALS & SCHEDULE' section with tabs for 'AUDITS', 'SIGN-OFFS, REQUESTS & APPROVALS', 'COMMENTS', and 'HISTORICAL AMOUNTS'. The 'HISTORICAL AMOUNTS' table shows a list of accounts and their corresponding pay codes and amounts.

**Historical Moves** are reflected and **approved** along with the employee's "**Current Pay Period**" timecard. The hours per "Account" in the totals tab include the historical amounts:

If the "Include in totals for effective date" checkbox has not been checked then the Historical Move will not show in the "Current Pay Period" under the Totals & Schedule" tab and therefore they will not be sent to project accounting. These Historical moves will only be in the Kronos system. In this case the historical move needs to be re-entered (please refer to "**Modify a Historical Edit**" section for details)

The screenshot shows the 'HISTORICAL AMOUNTS' tab. A red oval highlights the 'Account' column header in the table. The table lists historical moves with columns for Account, Pay Code, Amount, and Wages. The table also shows a summary of accrual codes and their balances on the selected date.

**ALL** historical moves (including the ones that the "Include in Totals" was not set) are listed in the "Historical Amounts" tab of the current pay period:

**NOTE:** To delete a historical move (as if it never happened) can be done **only** in the "Historical Amounts" tab for the "Current Pay Period" (please refer to the "**Delete a Historical Edit**" section for details)

**TIMECARD**

Loaded: 9:40

Name & ID PISCHALNIKOVA, L... 11967N

Time Period Current Pay Period

Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Cumulative
Sun 6/27											
Mon 6/28											
Tue 6/29											
Wed 6/30											
Thu 7/01											
Fri 7/02											
Sat 7/03											
Sun 7/04											
Mon 7/05											

Effective Date	Historical Date	Type of Edit	From Account	To Account	From Pay Code	To Pay Code	Amount	Comments	Note
6/30/2010	5/21/2010	Historical Pay Code ...	...A-45A.12.01.3.11/III	...A-45A.12.01.3.11/III	Regular - Weekly	Regular - Weekly	16.0	General	Project 45A Work [penelop...

To transfer part of the hours worked that were the result of a Historical Move to a different Project-Task/Activity go to the “Current Pay Period” of the employee’s timecard in the “Totals & Schedule” tab right click on the line that hours need to be transferred and click on the “Move...”

After saving the historical edits, the timecard displayed reflects the changes:

Green-Ye Log Off | Setup | Help

Timecard | Schedule | People | Reports | Home

**Non-Exempt timecard with historical edits (gray background entries)**

TIMECARD  
Loaded: 15:28

Name & ID: GALVAN, JOHN L 14918N  
Time Period: 5/17/2010 - 5/23/2010, Range of Dates

Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Cumulative
Sun 5/16											
Mon 5/17	Regular - Weekly	8.0									
Mon 5/17	Regular - Weekly	-8.0									
Mon 5/17			8:00		16:30				8.0	8.0	8.0
Tue 5/18			8:00		16:30				8.0	8.0	16.0
Wed 5/19			8:00		16:30				8.0	8.0	24.0
Thu 5/20			8:00		16:30				8.0	8.0	32.0
Fri 5/21	Regular - Weekly	-8.0									
Fri 5/21			8:00		16:30				8.0	8.0	40.0
Sat 5/22											40.0
Sun 5/23											40.0
Mon 5/24											

Green-Ye Log Off | Setup | Help

Timecard | Schedule | People | Reports | Home

**Exempt timecard with historical edits (gray background entries)**

TIMECARD  
Loaded: 15:48

Name & ID: EVANS, DAVID 12825N  
Time Period: 5/17/2010 - 5/23/2010, Range of Dates

Pay Code	Transfer	Mon 5/17	Tue 5/18	Wed 5/19	Thu 5/20	Fri 5/21	Sat 5/22	Sun 5/23	Total
Hours Worked	///ICD-3339-CMS ... Workflow Management Development///	9.0	9.0	10.0	10.0	6.0			44.0
Regular - Salaried	...1.05.01.04/ICD-3339-CMS ... Workflow Management Development/MIS/-/-	-4.0							-4.0
Vacation - Salaried	...13061NCD - CMS/9999-9999-9999/-MIS/-/-	4.0							4.0
		9.0	9.0	10.0	10.0	6.0			44.0

ACCUALS | AUDITS | SIGN-OFFS, REQUESTS & APPROVALS | HISTORICAL AMOUNTS

Date	Start Time	End Time	Pay Code	Amount
Mon 5/17				
Tue 5/18				
Wed 5/19				
Thu 5/20				

Historical edits are reflected and approved along with the employee's "Current Pay Period" timecard:

TIMECARD  
Loaded: 15:33

Name & ID: GALVAN, JOHN L 14918N  
Time Period: Current Pay Period

Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Cumulative
Sun 6/13											
Mon 6/14											
Tue 6/15											
Wed 6/16											
Thu 6/17											
Fri 6/18											
Sat 6/19											
Sun 6/20											
Mon 6/21											

ACCUALS | AUDITS | HISTORICAL AMOUNTS

Date	Start Time	End Time	Pay Code	Amount
Mon 6/14				
Tue 6/15				
Wed 6/16				
Thu 6/17				
Fri 6/18				
Sat 6/19				
Sun 6/20				

**NOTE:** To delete a historical edit (as if it never happened) can be done only in the “Historical Amounts” tab for the “Current Pay Period” (please refer to the “Delete a Historical Edit” section for details)

Effective Date	Historical Date	Type of Edit	From Account	To Account	From Pay Code	To Pay Code	Amount	Comments	Note
6/16/2010	5/21/2010	Historical Pay Code Edit		...03.05.15.01/-/TCH/-/		Regular - Weekly	-8.0 (paid)		
6/16/2010	5/17/2010	Historical Pay Code Edit		...03.05.15.01/-/TCH/-/		Regular - Weekly	-8.0 (paid)		
6/16/2010	5/17/2010	Historical Pay Code Edit		...tegards andTCH/-/		Regular - Weekly	8.0		

To transfer hours worked or overtime that was the result of a Historical edit to a different Project-Task/Activity, go to the “Current Pay Period” of the employee’s timecard. In the “Totals & Schedule” tab right click on the line that hours need to be transferred and click on the “Move...”

TOTALS & SCHEDULE				ACCRUALS	AUDITS	HISTORICAL AMOUNTS
All						Date
						Mon 6/14
						Tue 6/15
						Wed 6/16
						Thu 6/17
						Fri 6/18
Account	Pay Code	Amount	Wages			
...COMPUTER SECURI... Comp. Safeguards and/TCH/-/	Regular - Weekly	8.0		Move...		

**Move Amount**

**From**

Pay Code: Regular - Weekly

Amount (HH.hh): 8.0

Transfer: ;13426N/CD - OFFICE OF CIO/511-511.07.03/CD-2862-COMPUTER SECURI... Comp. Safeguards and/TCH/-/

**To**

Pay Code \*: Regular - Weekly

Amount (HH.hh) \*: 4.0

Effective Date \*: 6/13/2010

Transfer: ;/CD-4698-DIVISION ADMINI... Deputy CIO//

Comments →

OK Cancel Help

## Delete a Historical Edit

To delete a historical edit go to the “Historical Amounts” tab (the time period needs to be the “Current Pay Period”):

The screenshot shows the Green-Yellow Timecard interface. At the top, there are navigation tabs: GENERAL, MY GENIES, TIMEKEEPING, SCHEDULING, MY INFORMATION, and DATA INTEGRATION. Below these, there are sub-tabs: Timecard, Schedule, People, Reports, and More. The main header displays 'TIMECARD' and 'Loaded: 15:51'. The user's name and ID are 'EVANS, DAVID' and '12825N'. The 'Time Period' is set to 'Current Pay Period'. Below this, there are several tabs: ACCRUALS, AUDITS, and HISTORICAL AMOUNTS. The 'HISTORICAL AMOUNTS' tab is selected and circled in red. A table below shows historical amounts with columns for Date, Start Time, End Time, Pay Code, and Amount. The table contains entries for dates from Mon 6/14 to Sun 6/20.

Right click on the line that contains the historical edit to be deleted and press on the “Delete”

The screenshot shows the same Green-Yellow Timecard interface as the previous one. The 'HISTORICAL AMOUNTS' tab is selected. A table with columns: Effective Date, Historical Date, Type of Edit, From Account, To Account, From Pay Code, To Pay Code, Amount, Comments, and Note is displayed. The first row shows a historical edit on 6/16/2010. A right-click context menu is open over this row, with the 'Delete' option circled in red. A red arrow points from the text above to the 'Delete' option.

In the conformation dialog box select “Yes” to delete the entry:

**TIMECARD**

Loaded: 15:51

Name & ID: EVANS, DAVID 12825N  
Time Period: Current Pay Period

Save Actions Punch Amount Accruals Comment Approvals Overtime Reports

Week starting: Mon 6/14

Pay Code	Transfer	Mon 6/14	Tue 6/15	Wed 6/16	Thu 6/17	Fri 6/18
Hours Worked						

TOTALS & SCHEDULE ACCRUALS AUDITS HISTORICAL AMOUNTS

Effective Date	Historical Date	Type of Edit	From Account	To Account	To Pay Code	Amount
6/16/2010	5/17/2010	Historical Pay Code E...	...	...t Development/MIS/-/...	Regular - Salaried	-4.0 (impacts accruals)

Workforce Central

Are you sure you want to delete?

Yes No

**IMPORTANT:** If a historical edit resulted in more than one entries, all the entries associated with the historical edit need to be deleted.

**NOTE:** to complete the deletion you MUST save the timecard in the current pay period.

If the time period that you are trying to delete the historical edits is not the current one, the historical edits cannot be deleted and the following message is displayed:

Workforce Central

You cannot delete a historical edit in a signed-off pay period.

OK

## Modify a Historical Edit

Historical edits **cannot** be modified. You need to delete them and re-enter them. The best way is to delete the historical edit as described in the “Delete a Historical Edit” section.

Timecard with saved historical edits:

TIMECARD  
Loaded: 15:56  
Name & ID: GALVAN, JOHN L | 14918N  
Time Period: 5/17/2010 - 5/23/2010, Range of Dates

Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Cumulative
Sun 5/16											
Mon 5/17	Regular - Weekly	-8.0		:13426NCD - OFFICE OF CIO/50-03.05.15.01-/TCH/-/							
Mon 5/17	Regular - Weekly	8.0		...CD - OFFICE OF CIO/511-511.07.07.03/CD-2862-COMPUTER SECURI... Comp. Safeguards and/TCH/-/							
Mon 5/17			8:00		16:30				8.0	8.0	8.0
Tue 5/18			8:00		16:30				8.0	8.0	16.0
Wed 5/19			8:00		16:30				8.0	8.0	24.0
Thu 5/20			8:00		16:30				8.0	8.0	32.0
Fri 5/21	Overtime	5.5		...6N/CD - OFFICE OF CIO/50-02.32.02.06.01/CD-4237-ENTERPRISE INFO... FTL Stw Reliability/TCH/-/							
Fri 5/21	Regular - Weekly	-8.0		:13426NCD - OFFICE OF CIO/50-03.05.15.01-/TCH/-/							
Fri 5/21	Shift OT	5.5		...6N/CD - OFFICE OF CIO/50-02.32.02.06.01/CD-4237-ENTERPRISE INFO... FTL Stw Reliability/TCH/-/							
Fri 5/21			8:00		16:30				8.0	8.0	40.0
Sat 5/22											40.0
Sun 5/23											40.0
Mon 5/24											

TOTALS & SCHEDULE | ACCRUALS | AUDITS | HISTORICAL AMOUNTS | SIGN-OFFS, REQUESTS & APPROVALS

Date	Start Time	End Time	Pay Code	Amount
Mon 5/17				
Tue 5/18				
Wed 5/19				
Thu 5/20				
Fri 5/21				

Notice that all edits are present on the timecard in the historic pay period as well as in the current pay period.

TIMECARD  
Loaded: 15:59  
Name & ID: GALVAN, JOHN L | 14918N  
Time Period: Current Pay Period

Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Cumulative
Sun 6/13											
Mon 6/14											
Tue 6/15											
Wed 6/16											
Thu 6/17											
Fri 6/18											
Sat 6/19											
Sun 6/20											
Mon 6/21											

TOTALS & SCHEDULE | ACCRUALS | AUDITS | HISTORICAL AMOUNTS

Effective Date	Historical Date	Type of Edit	From Account	To Account	From Pay Code	To Pay Code	Amount	Comments	Note
6/17/2010	5/21/2010	Historical Pay Code Edit		... Sfw Reliability/TCH/-/	Overtime		5.5 (impacts accruals)		
6/17/2010	5/21/2010	Historical Pay Code Edit		... Sfw Reliability/TCH/-/	Shift OT		5.5 (impacts accruals)		
6/16/2010	5/21/2010	Historical Pay Code Edit		...03.05.15.01-/TCH/-/	Regular - Weekly		-8.0 (paid)		
6/16/2010	5/17/2010	Historical Pay Code Edit		...03.05.15.01-/TCH/-/	Regular - Weekly		-8.0 (paid)		
6/16/2010	5/17/2010	Historical Pay Code Edit		...afeguards and/TCH/-/	Regular - Weekly		8.0		

TOTALS & SCHEDULE | ACCRUALS | AUDITS | HISTORICAL AMOUNTS

Account	Pay Code	Amount	Wages	Date	Start
... CIO/50-50.02.32.02.06.01/CD-4237-ENTERPRISE INFO... FTL Stw Reliability/TCH/-/	Shift OT	5.5		Mon 6/14	
... CIO/50-50.02.32.02.06.01/CD-4237-ENTERPRISE INFO... FTL Stw Reliability/TCH/-/	Overtime	5.5		Tue 6/15	
...IO/511-511.07.07.03/CD-2862-COMPUTER SECURI... Comp. Safeguards and/TCH/-/	Regular - Weekly	8.0		Wed 6/16	
				Thu 6/17	
				Fri 6/18	
				Sat 6/19	

## Add Historical with Retroactive Pay Calculations only will be done by Payroll

Examples would be that recorded worked hours for a non exempt employee were incorrect, an incorrect amount of time-off was recorded, or time-off was recorded using an incorrect Pay Code (used vacation instead of holiday, or sick instead of vacation, etc.).

1. Determine the revision requirements to your previous timecard and verify that the change that needs to be made either affects the amount you were/should have been paid or one of your leave balances. Examples would be that recorded worked hours for a non exempt employee were incorrect, an incorrect amount of time-off was recorded, or time-off was recorded using an incorrect Pay Code (used vacation instead of holiday, or sick instead of vacation, etc.).
2. Discuss the revision with your supervisor and make sure that she/he understands and agrees that a revision needs to be made.
3. E-mail the revision to your supervisor per the following format,

The subject line of the e-mail should contain your name and ID

The body of the e-mail must contain

- 1) your name
  - 2) your Fermi ID number
  - 3) the pay period date that requires revision
  - 4) a phone number where you can be reached
  - 5) a detailed description of the revision required
4. Your supervisor is required to review the email and add any required notes or additions to the revision request. Your supervisor will then forward the request to the Payroll Department at this address [Timecard\\_Revision@fnal.gov](mailto:Timecard_Revision@fnal.gov) and copy you on the e-mail.
  5. Payroll will use the information contained in the e-mail to make the revision in the FTL system.
  6. Payroll will then send you and your supervisor a confirmation that the revision has been processed. This will be done via e-mail using the same [Timecard\\_Revision\(a\),fnal.gov](mailto:Timecard_Revision(a),fnal.gov) address.

## Correcting a Historical Edit on a Signed Off Timecard

This type of edit could occur if you are notified that someone gave you the incorrect code to charge on a previous historical edit.

1. Open the current time period (must not be signed off) and follow the same instructions for a historical edit. Make sure that the 'Historical Date' is the week that the original correction was made to (the week that the work was initially done in).