COSTPOINT TIME ENTRY GUIDE

Accessing Deltek Costpoint

06-22-2021

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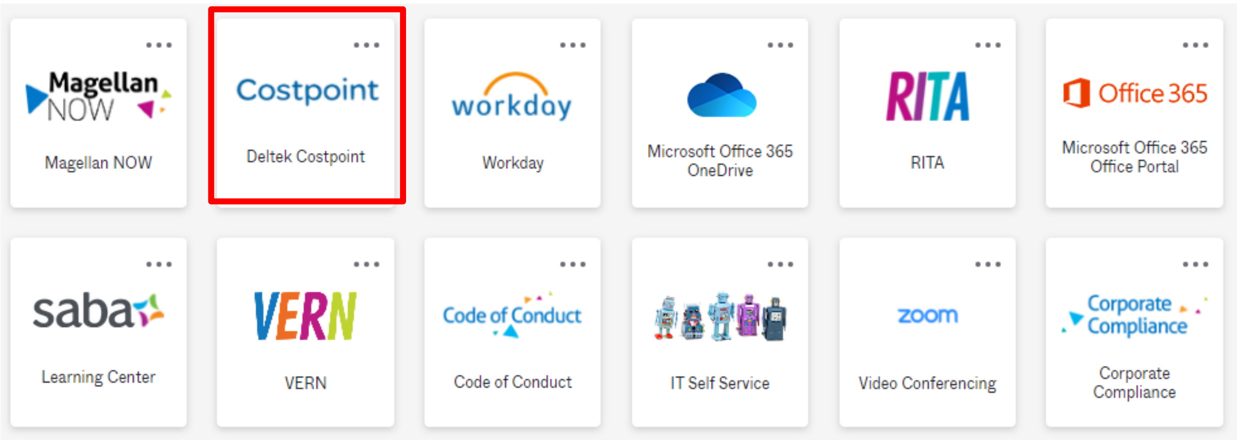
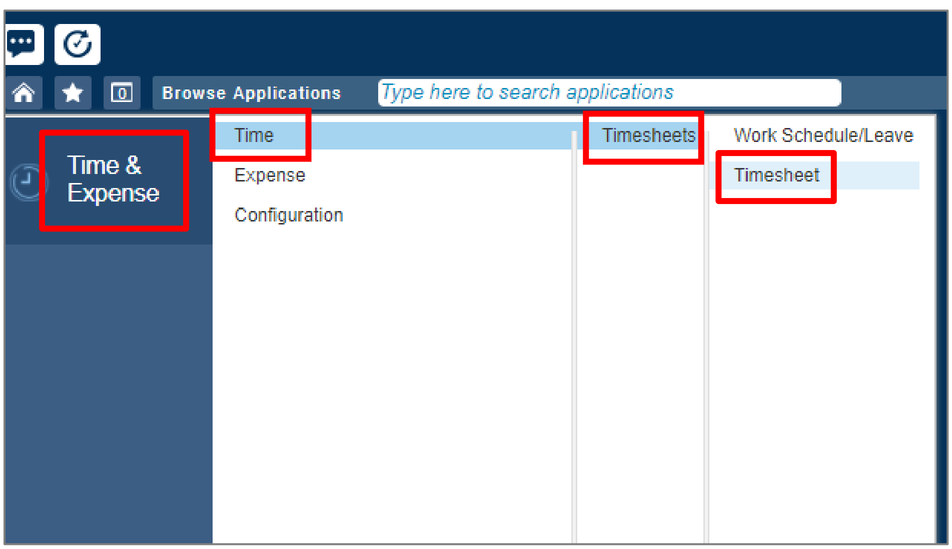
Accessing Deltek Costpoint

Magellan Federal employees access Deltek Costpoint via a tile in Okta, Magellan's identity and application access management portal

1. Log into Okta and look for the Deltek Costpoint tile.

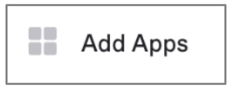


2. Click on the Deltek Costpoint tile and you will be automatically logged in to your Time & Expense Applications screen.
3. Navigate across the panels by clicking on Time & Expense, then Time, then Timesheets, then Timesheet. This will open your actual timesheet for the current pay period.



Note: If the tile is not already on your Okta dashboard, follow these steps to add it permanently:

Select "Add Apps" in the left-hand sidebar



In the "Search the app catalog" bar at the top of the screen, type in "Deltek Costpoint"

Find the Deltek Costpoint app and select "Add"

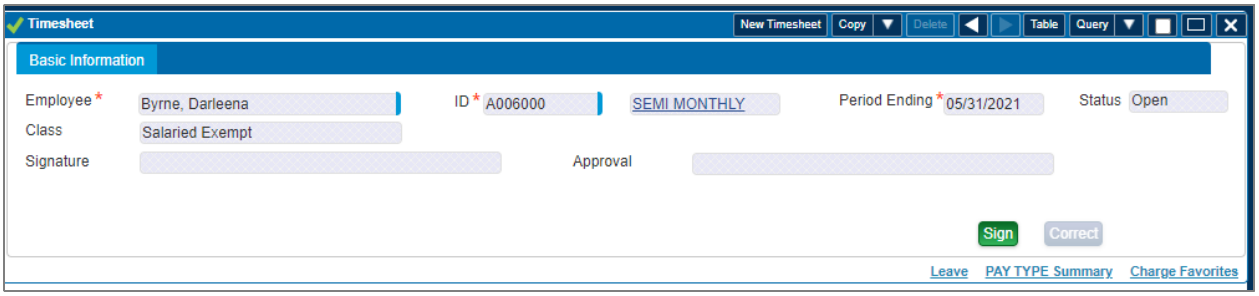
Troubleshooting Tips:

- Do not access Okta through Internet Explorer (IE). Use Google Chrome, Microsoft Edge, Firefox, etc.)
- Do not use the Okta Mobile App to access Deltek Costpoint. Instead use this URL https://magellanhealth.okta.com.
- If you have previously created a shortcut tile in Okta for Deltek, or if you have any other tiles in Okta for Deltek, you should delete them by hovering your cursor over the tile and clicking on the gear icon. Then look for the "General" tab, and from there, click the "Delete" button.
- If you are not redirected to Magellan Health's single sign on page—try clearing your cache for the internet browser you are using.
- If you are still having trouble, try rebooting (log out of your device and log in again).
- For additional help—contact MFGetIT@magellanfederal.com

Timesheet Application

The Timesheet application (or module) of Deltek Costpoint contains two sections: Basic Information and Timesheet Lines.

Basic Information Section



The top part of the Timesheet displays basic information. The fields in this section include:

- Employee and ID fields auto-populate.
- **Period Ending –** displays the date the pay period for this timesheet ends. Pay periods end on the 15th of the month and the last day of the month. The system automatically opens to the current pay period. If you have timesheets for previous pay periods, you can use the left arrow in the toolbar immediately above. The system is not configured to display future timesheets, so the right arrow is disabled.
- **Status -** displays the status of the timesheet. Statuses include:
  - **Open:** Your timesheet has been started but is not yet completed.
  - **Missing:** Your timesheet has not been started for the timesheet period.
  - **Signed:** Your timesheet has been signed. You can make changes to your timesheet but you will need to enter an explanation and re-sign it.
  - **Approved:** Your timesheet has been approved. You can make changes to your timesheet but you will need to enter an explanation and re-sign it, and your Timesheet Approver will need to re-approve it.
  - **Rejected:** Your timesheet has been rejected by your Timesheet Approver. You must make a change or update your timesheet and re-sign it, and your Timesheet Approver will have to re-approve it.
  - **Processed:** Your timesheet has been processed to the financial system. It cannot be changed at this point unless you do a correcting timesheet, which requires Finance assistance.
- Signature and Approval fields will auto-populate when you sign your timesheet and when your Timesheet Approver approves it.
- **Sign –** when you have finished working on the last working day of the pay period, click the green “Sign” button to sign your timesheet.

Application Toolbar

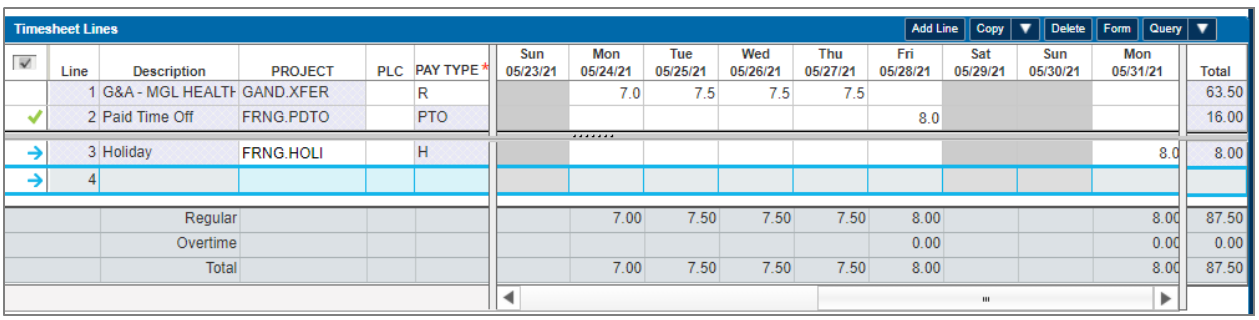
Above the blue *Basic Information* bar is a toolbar with the following commands:

- **New Timesheet –** At the beginning of each pay period, you will use this button to create a new timesheet.
- **Navigation Buttons:** You can use the left arrow to view timesheets for previous pay periods. The system is not configured to display future timesheets, so the right arrow is disabled when you are viewing the current pay period.
- **Table:** This button changes the view to a table where timesheet information is displayed in rows and columns. In Table view, the button changes to "Form" and operates as a toggle between the views.
- **Query:** This button can be used to search various parameters.

Timesheet Lines Section

The Timesheet Lines section is where you will identify project codes (or charge codes) for the hours you enter on your timesheet. Remember, in a total time accounting system, all hours must be accounted for.

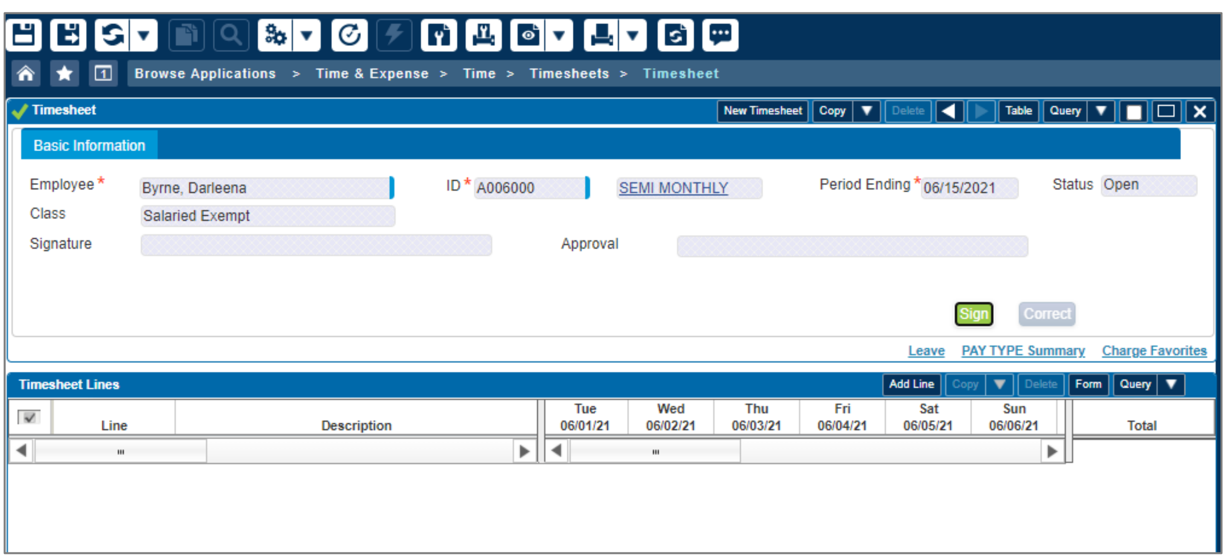
In this screenshot of a completed timesheet, the employee has entered regular work hours for Monday through Thursday, PTO for Friday, and Holiday hours for the following Monday.



Line	Description	PROJECT	PLC	PAY TYPE *	Sun 05/23/21	Mon 05/24/21	Tue 05/25/21	Wed 05/26/21	Thu 05/27/21	Fri 05/28/21	Sat 05/29/21	Sun 05/30/21	Mon 05/31/21	Total
1	G&A - MGL HEALTH	GAND.XFER		R		7.0	7.5	7.5	7.5					63.50
2	Paid Time Off	FRNG.PDTO		PTO						8.0				16.00
3	Holiday	FRNG.HOLI		H									8.0	8.00
4														
	Regular					7.00	7.50	7.50	7.50	8.00			8.00	87.50
	Overtime									0.00			0.00	0.00
	Total					7.00	7.50	7.50	7.50	8.00			8.00	87.50

Create Your First Timesheet

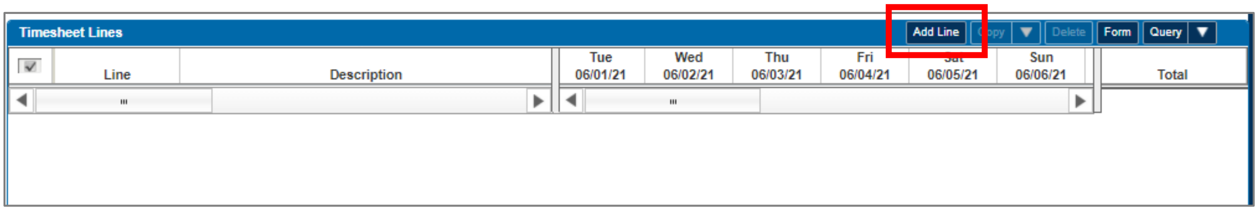
The first time you go into Deltek Costpoint, your Timesheet application will look like this:



Add a Timesheet Line

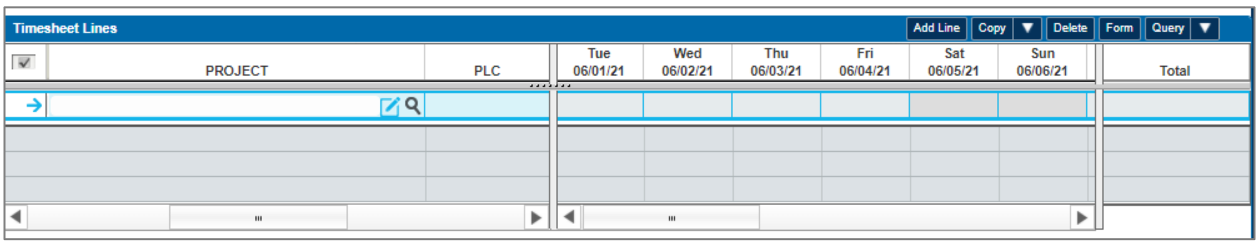
To add charges to your timesheet, you need to add a timesheet line.

Click the “Add Line” button in the blue bar at the top of the Timesheet Lines section.



Your screen will now look like this:

Note: There are scroll bars at the bottom of each side of the table. You may need to use them to see the Project column, or the date columns.



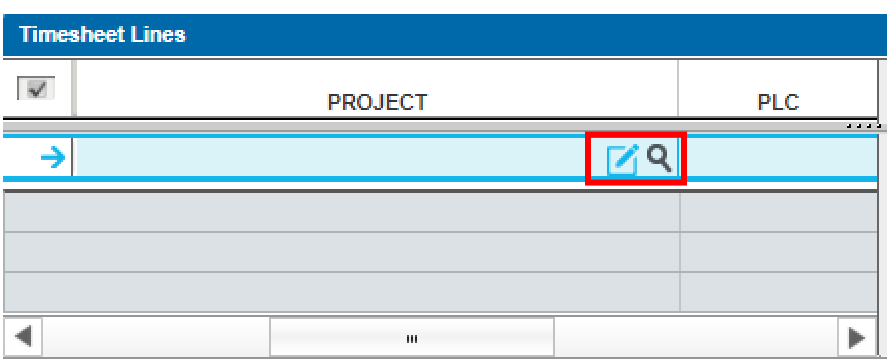
Add Charge Codes

Before you can enter hours in the right hand side of the screen for the dates you worked, you have to add the Project (or Charge) Codes to the line/row.

In a cost accounting system, “Projects” or “Charge Codes” are how the client contract is billed.

- “**Direct**” Charge Codes are used for hours that directly support a client program and generate revenue.
- “**Indirect**” Charge Codes are used for activities that do not directly support a client program or generate revenue but are needed to maintain business operations.

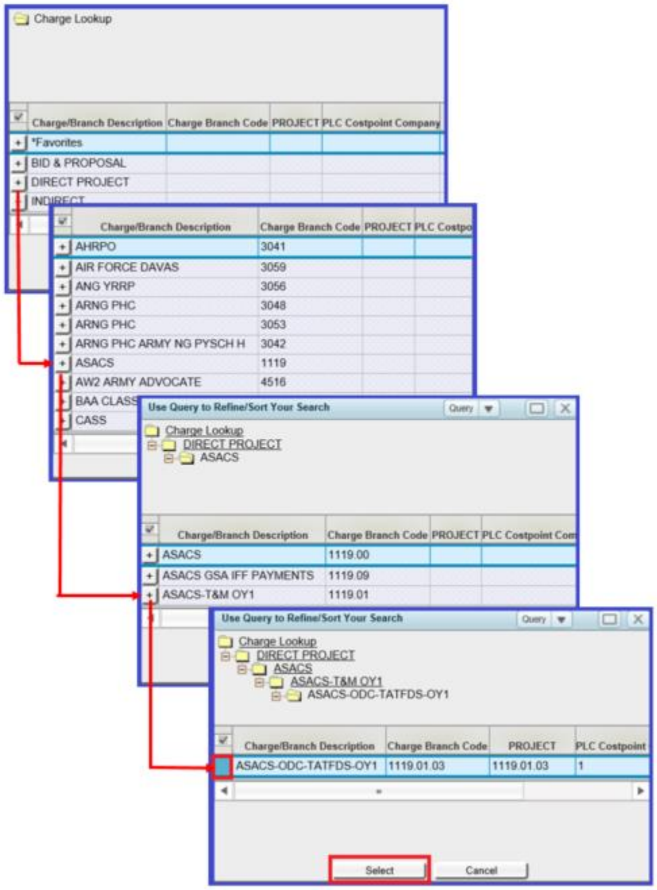
Click the magnifying glass to display the Charge Lookup window to pick the Project Code to pull into your timesheet:



Only those Projects that you are authorized to see will appear in your Lookup window. Use the plus sign ("+") to drill down to the charging level of the Project.

You will know that you have reached the charging level when the row no longer has a checkbox.

Click "Select" to add the charge code to your timesheet.

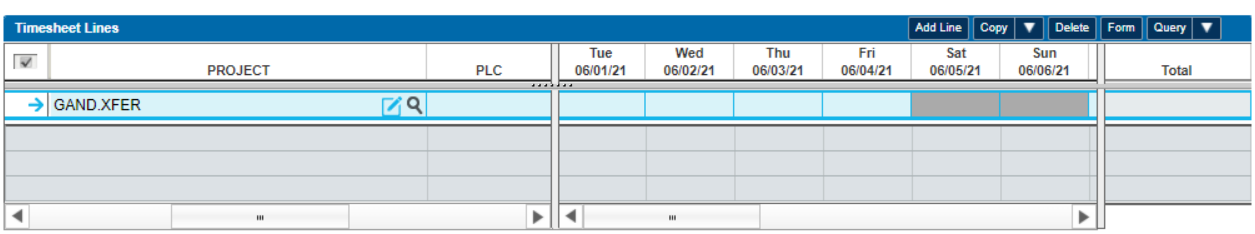


Important! You will be provided a Work Authorization Statement describing the Project/Charge Codes for your contract. Be sure you understand how to charge your hours correctly.

NOTE: Leave (Time Off) and Holidays are charged under Indirect Charge Codes and require a separate timesheet line for each when used, as shown in the sample screen shot on page 4.

Enter Hours

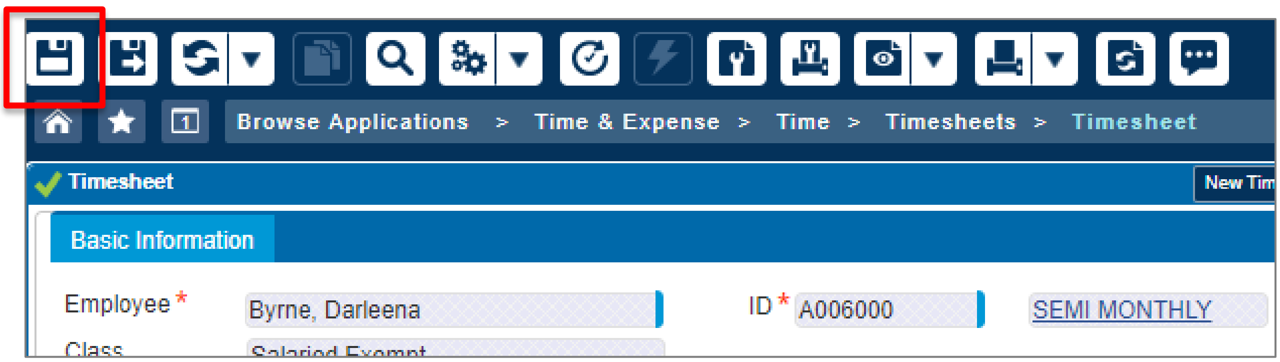
Now that you have added a line/row and selected the Project Code, you can enter hours allocated to that Project code in the righthand side of the Timesheet Lines section in the appropriate date column.



- Enter all hours worked for each Project.
- When entering your time, round to the nearest tenth of the hour.
  - .1 = 6 minutes
  - .2 = 12 minutes
  - .3 = 18 minutes
  - .4 = 24 minutes
  - .5 = 30 minutes
  - .6 = 36 minutes
  - .7 = 42 minutes
  - .8 = 48 minutes
  - .9 = 54 minutes
  - 1 hour = 60 minutes

Save your Entries

In the toolbar at the top of the Deltek Costpoint screen, click the “Save” button.



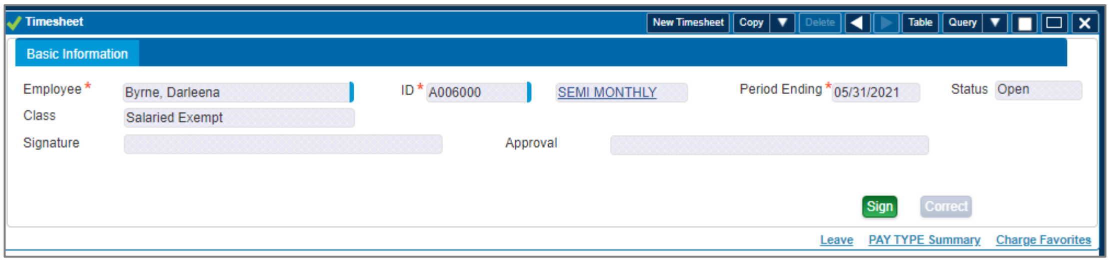
After you click the save button, look at the bottom of your screen for confirmation messages that your entries were recorded. If there is an error, the message will contain an explanation.

Exit Deltek Costpoint

To leave the system, look in the upper right corner of your screen for the power off button. When you hover over it with your cursor, it will display “Log Out”.

Sign your Timesheet

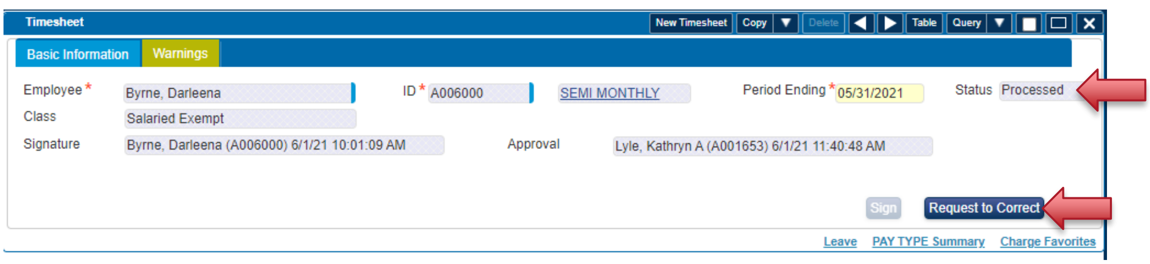
On the last working day in the pay period, enter your hours and sign your timesheet by clicking the green “Sign” button.



Once you have signed and saved your timesheet, notification will be sent to your supervisor to review your timesheet and then approve or reject it.

Making Corrections

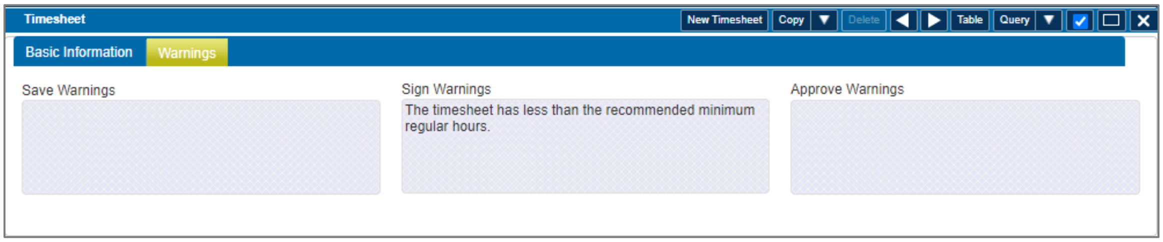
- If you make any changes or additions after saving your timesheet, you will be prompted to add an explanation as to why you made these changes and re-sign it.
- If your timesheet is rejected, you will receive notification that it has been rejected and you will need to go in immediately to make any necessary modifications and re-sign your timesheet.
- If your timesheet is in Processed status – meaning you have signed it, your Timesheet Approver has signed it, and the Finance team has processed it - you will need to navigate back by using the left arrow in the Timesheet toolbar, then click on the “Request to Correct” button that becomes available. Follow the prompts to submit your request to correct.



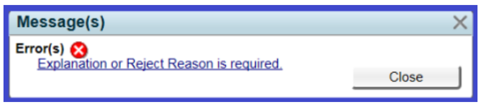
Additional Tabs

Notes Tab – Displays any notes that your supervisor may have added to your timesheet.

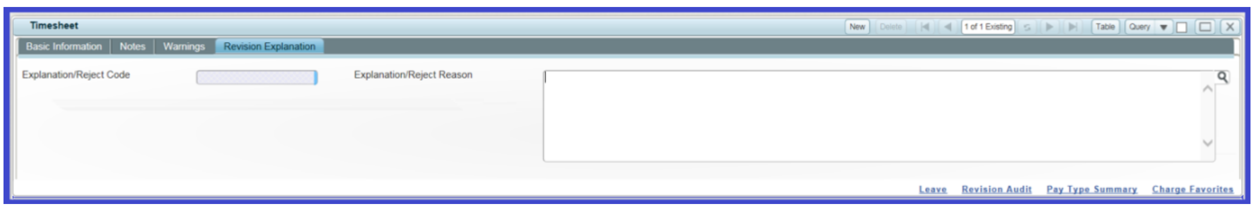
Warnings Tab – Displays any warnings that you received regarding the timesheet.



Revision Explanation Tab – If you have made a modification to your timesheet, the system will display an error message saying that an explanation is required. You will not be able to save your timesheet until you add an explanation.



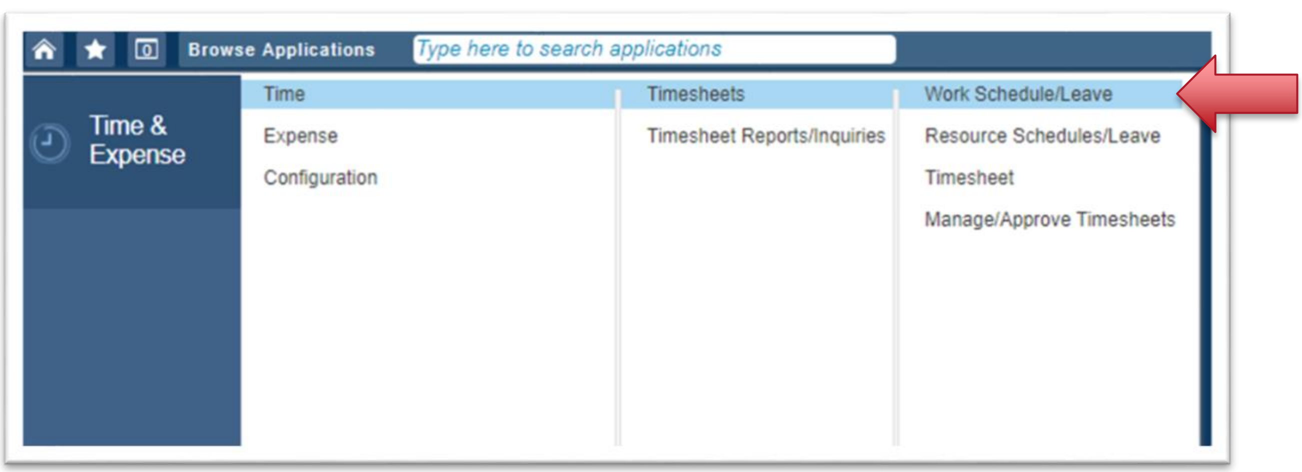
Follow the prompts to enter your explanation. Once you have saved your timesheet, your explanation can be viewed on the Revision Explanation tab.



Work Schedule/Leave Application

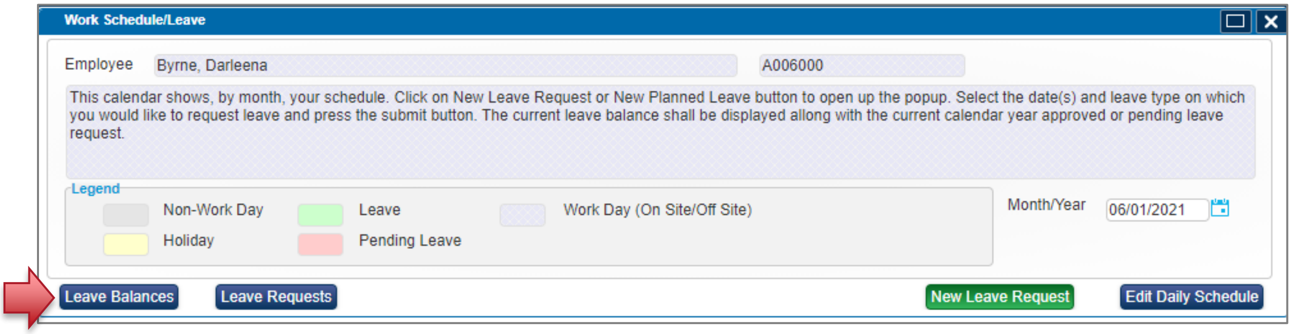
The Deltek Costpoint Work Schedule page allows Magellan Federal employees to easily submit leave and PTO requests within the system. Employees may view their leave balances at the time they submit the leave requests, and view when the request has been approved by their manager.

From the Deltek Costpoint homepage, navigate the applications panels and select Work Schedule/Leave.

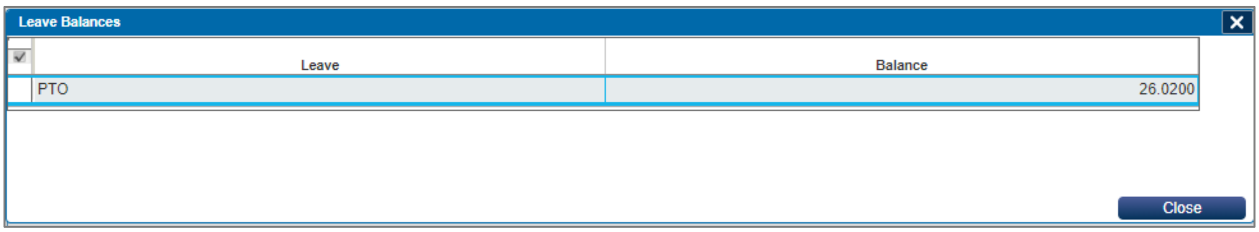


View Leave Balances

From the Work Schedule screen, click the Leave Balances button:



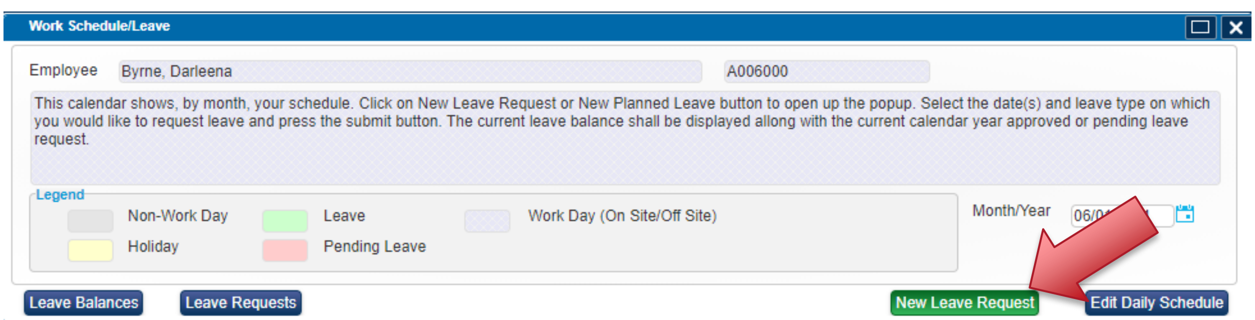
The Leave Balances window will display, listing totals for all accumulated leave. Click Close to exit the window.



NOTE: Leave Balances are only available for the current pay period. Future timesheets are not available for time entry; therefore, you cannot see your future Accrual or Leave Balance.

Submit Leave Requests

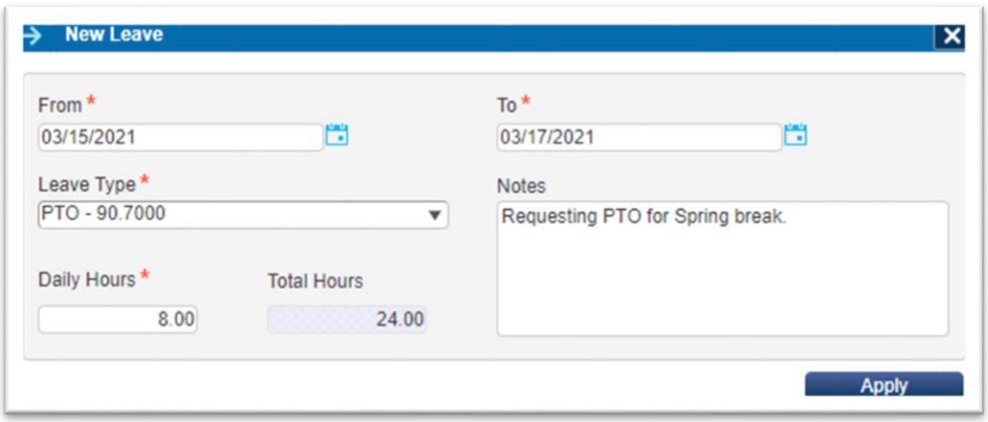
On the Work Schedule screen, click the New Leave Request button:



The **New Leave** window will appear.

1. Enter the From and To dates for the leave request.
2. Under Leave Type, click the dropdown arrow to select the type of leave being requested. The hours of available leave are displayed per leave type.
3. Under Daily Hours, enter the number of hours per day to be subtracted from the leave balance, typically 8 hours per day.
4. In the Notes section, add comments or explanation for leave request.

5. Deltek will auto-calculate the total hours of leave.
6. Click Apply.
7. Request will be automatically sent to your Timesheet Approver.



Enter Leave on your Timesheet

Important! Once your request has been approved for leave in the current pay period, be sure to:

1. Go into your Timesheet.
2. Click the “Add Line” button.
3. Click the magnifying glass in the Project field and select “Indirect”.
4. Select the appropriate Fringe Benefit to allocate the hours to.
5. Enter the hours in the date column for the Paid Time Off row.
6. Save your timesheet.

NOTE: It is not possible to enter labor hours on future dates, but you can enter leave hours for future dates within the current pay period. For example, if Carlos works June 27 and 28, has approved leave for June 29 and 30, at the end of the day June 28 he can enter his labor hours for that day’s work, add a line for leave and enter those hours for June 29-30, save and sign his timesheet for that pay period.