Supervisor’s User Guide (Exempt Employees_Web):
Responsibilities and Getting Started

Accessing CalTime

Supervisors primarily access CalTime using Web access. Web access can be found at http://caltime.berkeley.edu/access.

If you have any problems accessing CalTime, please contact the CalTime Help Desk:
- (510) 664-9000 (press 1 for IT, 2 for Application Support, and then 3 for CalTime)
- caltime@berkeley.edu, which will automatically enter your request into the CalTime ticketing system

Supervisor’s Responsibilities

Supervisors are responsible for the accurate reporting of leave taken by all of the exempt employees they directly supervise.

As a supervisor, you review and approve the timecard of the employees who are assigned to you.

As a supervisor, you are responsible for ensuring that all of your exempt employees:
- accurately enter leave taken for each pay cycle period
- approve their timecard by the pay cycle deadline, regardless of whether leave is taken or not

After your exempt employees approve their timecard, supervisors are responsible for ensuring that each exempt employee’s timecard is:
- reviewed and verified for accuracy and completeness
- approved by the pay cycle period supervisor deadline

NOTE: Supervisory approval in CalTime is the supervisor’s certification that the information is a complete and accurate record of the exempt employee’s leave taken.

ALERT: The supervisor should not approve an employee’s timecard if the employee has not approved it. Notify the employee to first complete and approve their timecard before adding your own approval. Even if you believe the timecard is correct, you want your employees to affirm it through their approval before you approve the timecard.

Deadline for Supervisor Approval

The deadline for exempt employee timecard approval is the 1st calendar day following the just completed monthly pay cycle (e.g., employee approval of a June timecard must be done by 11:59:59 PM, July 1st.)

The deadline for supervisor approval is the 5th calendar day following the just completed monthly pay cycle. If the approval date falls on a weekend or holiday, approval should be
performed the last working day prior to the approval date. No employee timecard should be supervisor-approved prior to the 2\textsuperscript{nd} day of the month following the monthly pay period to be approved.

\textbf{NOTE:} If the supervisor’s approval date falls on a weekend or holiday, approval should be performed the last working day prior to the approval date. For example, if Sunday is the 5\textsuperscript{th} day of the month, approval should take place on Friday, the 3\textsuperscript{rd}.

\textbf{ALERT:} Once the supervisor approves the timecard, the exempt employee is no longer able to edit their timecard. Therefore, supervisors should not approve prior to the 2\textsuperscript{nd} calendar day of the month.

\textbf{NOTE:} Approvals can always be removed to allow for timecard updates and changes and then reapproved.

\textbf{TIP:} Even though you have from the second to the fifth calendar day of the month to approve your employee’s timecards, it is a best practice to start the process on the second calendar day so that there is enough time for notification and follow-up action by the employee if the timecard needs to be corrected.

\section*{Training}

It is highly recommended that supervisors attend training presentations, and training information for supervisors can be found in the Training section of the CalTime website: http://caltime.berkeley.edu/training/supervisors.html

A variety of training resources are available, including:

\begin{itemize}
  \item a brief video on CalTime navigation, recording leave, and approving leave,
  \item supervisor learning guides and job aids,
  \item dates of upcoming instructor-led training classes available via the UC Learning Center (UCLC) through Blu (http://blu.berkeley.edu).
\end{itemize}

The UC Learning Center link is located in the Self Service menu on the left margin of Blu.

\section*{CalTime Web-Access Screens}

The following gives supervisors an introduction to the CalTime software, through which they can do the following:

\begin{itemize}
  \item approve a single timecard or multiple timecards
  \item add leave and leave hours
  \item correct leave or leave hours
\end{itemize}
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- delete leave and leave hours
- remove timecard approval.
- generate reports

Job aids for each of the above tasks may be found on Caltime’s Supervisor Training web page: [http://caltime.berkeley.edu/training/supervisors.html](http://caltime.berkeley.edu/training/supervisors.html)

**Menus**

You can navigate to any timekeeping page using the menus below the CalTime banner. Each menu contains other supervisorial timekeeping pages to which you have access.

The Supervisor menus include:

- **General Tab** with one link:
  - Reports available for employees in your list

- **My Genies (R) Tab** with two links:
  - QuickFind to search for employee records
  - Leave Usage Genie to list all your employees and give you access to their records of leave and hours

- **My Information Tab** with two links:
  - My Timecard giving you access to your own timecard
  - My Reports allowing to generate reports showing your own leave codes and hours

- **My Links Tab** with several links to job aids for supervisors
CalTime uses **Genies** to display leave and hours for one, multiple, or all employees. In addition, Genies can also be viewed as a reporting tool since the information they display is exportable to *Microsoft Excel*. There are two genies for supervisors:

- **QuickFind Genie** allows you to search for and find individual employee information quickly and easily.
- **Leave Usage Genie** is the Supervisor’s home page. It displays:
  - a list of all of your employees
  - the leave they have taken during the specified time period
  - whether or not they have approved their timecard.

**Show and Time Period Drop Lists**

Use the **Show** drop list to select the group of employees you wish to display. When you log on to the **Leave Usage Genie**, the default setting for **Show** is **All Home**, which displays all employees whose time you review and approve.

Use the **Time Period** drop list to specify the time frame you want to view, such as the **Current Pay Period** or **Previous Pay Period**. The time period you select determines which leave and hours reported will be displayed.

**Quick Links**

Quick Links are located at the top of the workspace and allow you to access information specific to one or more employees. For example, you see the following Quick Links in the Leave Usage Genie:

- **Timecard**, which displays timecards for one or more selected employees
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- **Reports**, which allows you to run reports for one or multiple selected employees, such as the Leave Balances Accruals and Projections or Time Detail reports.

You can select one employee and click the **Timecard** quick link to access his or her timecard. Or, you can select multiple employees and click the **Timecard** quick link to view timecards for just those employees whom you selected.

**Selecting Employees**

Once in the **Leave Usage Genie**, there are various ways to select employees before using a quick link:

- **Option 1:** In the workspace area, highlight the employees for whom you need to access data by clicking your cursor on a particular employee row.
- **Option 2:** Click-and-drag the mouse to select employees.
- **Option 3:** Use the **Ctrl** key to select more than one employee not listed next to each other. (**Command**-click on the Mac.)
- **Option 4:** Use the **Shift** key to select all employees listed between two employees, including the two employees.
- **Option 5:** Use **Select All** in the **Select an Action** menu.
Command Options

The **Command options** are tasks that you can perform on the page. Each option is specific to the page you are currently viewing. The following illustration show two such options: **Refresh** and **Select an Action**.

**Refresh** we have already discussed. **Select an Action** links to a drop-list menu, as you can see below:

![Refresh and Select an Action](image)

**Refresh**

If you take an action in CalTime and it does not display, click the **Refresh** button to see the results of your action. For example, if you approve an employee’s timecard, the action (“1”) will not show in the **Supervisor Approval** column until you click **Refresh**. Also, when an employee makes an update to a timecard while you are logged into CalTime; your display might still show the employee’s previous status. Refresh your screen to see the employee’s new status.

![Refresh](image)

**Note:** There is also a **Refresh** link in the command buttons bar on each employee’s **Timecard** page.

**ALERT:**

It is always good to refresh your screen to make sure you are looking at the most up-to-date information, especially if you have been on the same screen for an extended period.
Logging Off

Once your work is complete, use the Log Off link to exit CalTime and end your session.

The Log Off button is found in the same location, no matter where you are in CalTime. The following shows the Log Off link on the CalTime banner, from the CalTime supervisor’s opening screen: