Timekeeper:
Friendly Name Historical Edit

Historical Edits can only be entered in signed-off time periods.

A Retroactive Pay Historical Edit must be performed whenever signed-off timecard Friendly Name data needs to be corrected. A typical situation is when an employee has entered an incorrect Friendly Name, and the error was not caught and corrected by the supervisor before sign-off by the Timekeeper.

1. Log in to CalTime. CalTime will open to **QUICKFIND**.

2. Enter the last name or ID of the employee needing a historical edit into the **Name or ID** Field.

3. Select the appropriate **Time Period** in the **Time Period** field. In this example, **Previous Pay Period** is chosen.

4. Click the **Find** button.

A list of matching employees will be displayed—in this example, **Anderson001 Nick**.

5. Double-click on the desired employee name to navigate to their timecard in the defined time period.
In this example, Nick Anderson (who usually works in the Doe Library) accidentally chose his usual Friendly Name (Doe Library) on Friday 8/22. He was actually working at Moffitt library that day. A retroactive pay calculation historical edit must be performed to change the chart string from Doe Library to Moffitt Library.

6. Click the **Amount** menu and select the **Add Historical with Retroactive Pay Calculation** item to navigate to the **Add Historical with Retroactive Pay Calculation** screen.

The **Add Historical Amount with Retroactive Pay** window will display. The needed correction can now be added to the appropriate cell in the timecard.

7. Click the cell that needs editing in the **Transfer** column, and click the **Search** button.
The Select Transfer window will open. Notice the Job code option button is selected, and Library-Do is displayed. This is the current state of the timecard record. We need to change the record from Doe to Moffitt. LIBRARIAN MOFFIT is an option in the Available Entries: window.

8. Click the desired Available Entry, and the entry will display in the Job line. In this example LIBRARIAN DOE is replaced by LIBRARIAN MOFFIT.

9. Click the OK button to return to the Historical Edit with Retroactive Pay Calculation window.

The Add Historical Amount with Retroactive Pay Calculation window will appear with the Friendly Name chosen in the previous step.

10. Click the Calculate Differences button to navigate to the next Add Historical Amount with Retroactive Pay Calculation window.
Two lines will appear in this window, one indicating a charge to the new Friendly Name (positive number) and one indicating a reversal of charge to the original Friendly Name (negative number).

11. If the historical edit should be passed to PPS check both Include in Totals* checkboxes. If the historical edit should not be passed to PPS do not check these boxes.

12. Click the Save button.

CalTime will have added two additional lines with grey backgrounds to Friday 8/22 indicating a reversal of charge to the original Friendly Name (LIBRARIAN DOE in this example), and a charge to the new Friendly Name (LIBRARIAN MOFFIT in this example).

This Friendly Name Historical Edit process is complete.