Responsibilities and Getting Started (RDP)

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Accessing CalTime

RDP access to CalTime can be found at **http://caltime.berkeley.edu/access**.

If you have any problems accessing CalTime, please contact the CalTime Help Desk**:**

- **caltime@berkeley.edu**, which will automatically enter your request into the CalTime ticketing system

Training

It is highly recommended that supervisors of non-exempt employees attend training presentations. Also, training information 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:

- a video on CalTime for Supervisors of Non-Exempt Employees
- supervisor learning guides and job aids (*covering timecard approval, timecard exceptions, comments, work rules, adding a row, pay period approval, running reports, schedules, and meal deductions*)
- open lab schedules

The Biweekly Pay Period

The biweekly pay period for non-exempt employees begins at 12:00 AM on Sunday and closes the following second Saturday at 11:59:59 PM.

Supervisor's Responsibilities

Timecard Approval

Supervisors are responsible for the accuracy of time reported on the timecards of the non-exempt employees' they supervise, so employees will be paid properly and on time.

As a supervisor, you are responsible for ensuring that all of your non-exempt employees:

- accurately enter the in and out times for the hours they have worked
- accurately enter leave
- approve their timecards by the pay cycle deadline, in keeping with department practice

You are then responsible for:

- reviewing every timecard for accuracy and completeness
- working with employees to resolve errors
- approving the timecard by the deadline for supervisor approval

In certain cases, you may need to submit a timecard on behalf of the employee (for example, if

the employee is sick when it's time to submit timecards).

NOTE: Supervisory approval in CalTime is certification that the information is a complete and accurate record of the non-exempt employee's hours worked and leave taken.

ALERT: If department practice requires employee timecard approval, *the supervisor should not approve an employee's timecard if the employee has not approved it*. Time permitting, notify the employee to first complete and approve their timecard before adding your own approval. Even if you believe the timecard is correct, employees should certify the time is correct.

Deadlines for Timecard Approval

The deadline for ***non-exempt employee* approval** of a timecard is 11:59:59 PM on their last working day of the biweekly pay period.

The deadline for ***supervisor* approval** of a non-exempt employee's timecard is 11:59:59 PM, the first Monday following the close of the biweekly pay period.

No employee timecard should be supervisor-approved prior to the deadline for non-exempt to approve their timecards, so that employees may review and approve their timecards.

ALERT: Once the supervisor approves the timecard, the employee is no longer able to edit his/her timecard, unless the supervisor removes approval. If you remove your approval to allow an employee to edit, make sure to reapprove the timecard when the employee has finished making edits.

BEST PRACTICE: Supervisors of many employees should review timecards often during the biweekly pay period.

Delegating

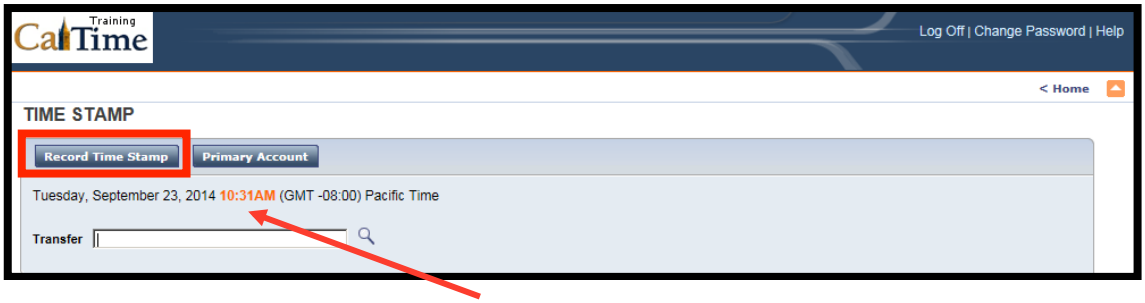
CalTime allows supervisors to delegate the process of review and approval of the employee timecards for which they are responsible. For more information about delegating CalTime supervisorial responsibilities, see the job aid, *Delegated Supervisors*.

Types of Non-Exempt Employees

There are two types of non-exempt employees: "Real Time" and "Anytime". Some Real Time employees clock in and out by swiping their ID badge at a terminal; some click a timestamp via the CalTime program running on a PC. All Real Time employees enter their start and stop times as they occur. "Anytime" employees all clock in and out through PCs and may enter their start and stop times, transfers, and leave at any time during the biweekly pay period.

Some Real Time employees will be recognized at terminals by swiping their UC ID cards; some will be recognized biometrically, with a swipe and a fingerprint. This is a terminal:

Some Real Time PC users clock in (timestamp) on a PC, through a screen that looks like this:



Non-exempt employees click the "**Record Time Stamp**" button to clock in and out of a shift.

Meal Deductions

Everyone is set up in CalTime with an automatic meal deduction. Most employees are allotted 30 or 60 minutes for this break. Meal deductions are built into CalTime, so non-exempt employees do not have to clock out and back in again when they have meals on shifts where they work 5 hours or more. *I.e.*, the default meal deduction is 60 minutes, so if a non-exempt employee clocks in at 7:30 AM and clocks out at 4:30 PM, he/she will be paid for eight hours.

By law, non-exempt employees should have a 30-minute meal break after five hours of work, so only rarely would the meal break deduction be waived. When it is necessary, the supervisor is responsible for overriding the meal deduction.

Work Rules

These are a compilation of:

- union affiliation or uncommitted
- non-exempt or exempt status

- comp time or overtime elective
- eight-, ten-, or twelve-hour workday
- day, evening, or weekend shift worked
- thirty, sixty, or zero-minute meal deduction.

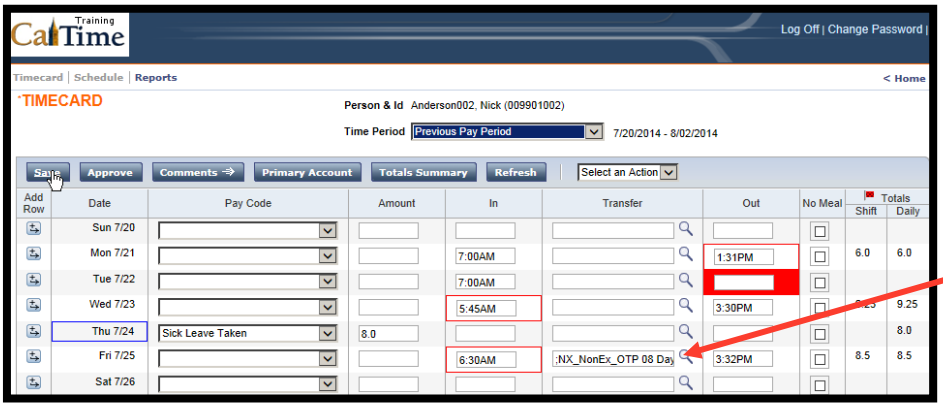
The following are examples of work rules:

NX_NonEx_OTP 08 Day 30d

union non-exempt Overtime Premium 8-hour workday Day shift 30-minute meal period

NX_NonEx_CTP 10 Day 60d

The second example differs from the first in that it represents an NX union, non-exempt employee who is receiving comp time premium, has worked a ten-hour day shift, and has taken a sixty-minute meal period.



An example of a work rule in a timecard

A work rule transfer should be applied when there is a change in an employee's standard work rule for a shift.

The supervisor is responsible for applying the work rule transfer.

CalTime RDP-Access _____

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

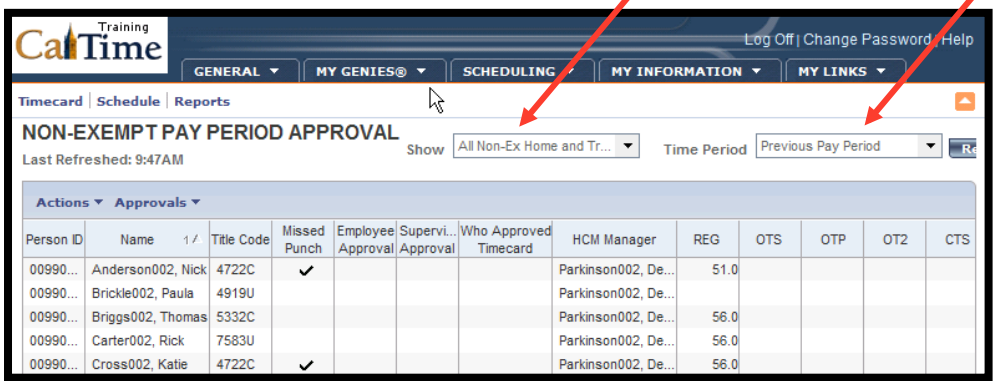
- approve a single timecard or multiple timecards
- add, correct, and delete leave **Pay Codes** and leave hours
- add, correct, and delete punches
- perform work rule transfers
- perform job, contract, or grant transfers
- cancel meal deductions
- add and delete comments on timecards
- monitor regular hours worked and overtime
- remove timecard approval
- generate reports
- view worked accounts (Friendly Names) and employee hours associated with those accounts
- view accrual leave balances from a Genie
- create and edit schedules

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**

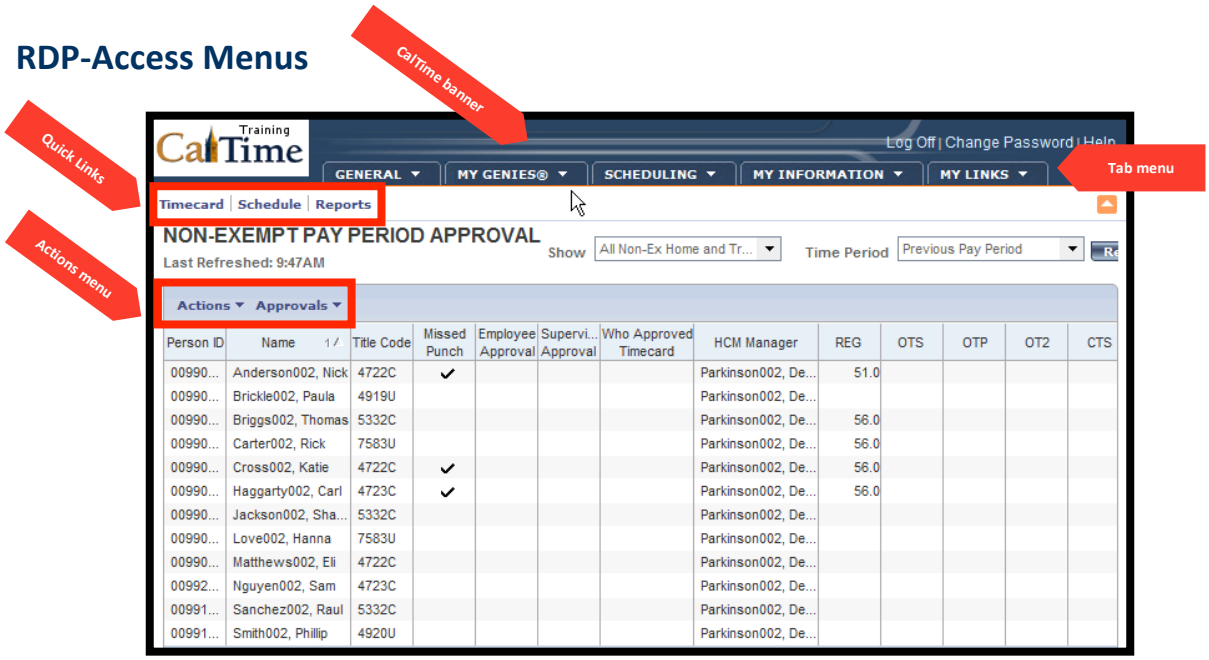
A job aid for submitting your own timecard is found on CalTime's Exempt Employee Training web page: **http://caltime.berkeley.edu/training/ exempt.html**

RDP-Access Home

Below you see your RDP-access **Home** page in CalTime, which defaults to the **NON-EXEMPT PAY PERIOD APPROVAL** Genie, showing **All Non-Exempt Home and Trans. In** and a **Time Period** of **Previous Pay Period**.



RDP-Access Menus



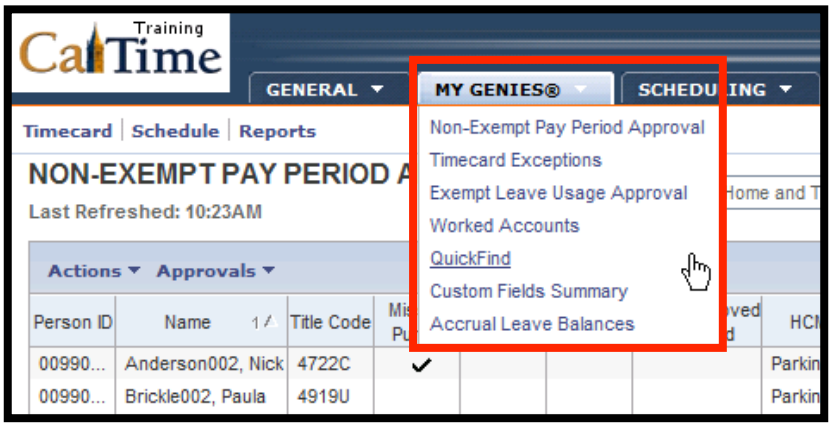
You can navigate to any timekeeping page using the tabs inside the CalTime banner. Each menu contains other links to supervisorial timekeeping pages to which you have access.

The RDP-access supervisor Tab menu includes:

- **General** tab with two links:
  - **Group Edit Results**
  - **Reports**
- **My Genies (R)** tab which contains links to:
  - **Non-Exempt Pay Period Approval**
  - **Timecard Exceptions**
  - **Exempt Leave Usage Approval**
  - **Worked Accounts**
  - **QuickFind**
  - **Custom Fields Summary**
  - **Accrual Leave Balances**
- **Scheduling** tab with one link:
  - **Schedule Editor**

- **My Information** tab with two links:
  - **My Timecard**
  - **My Reports**
- **My Links** tab with several links to job aids for supervisors

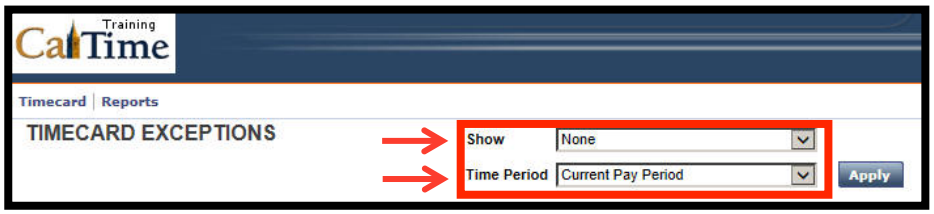
RDP-Access "My Genies"



CalTime uses **Genies** to locate employees and display leave, hours, and exceptions for one, multiple, or all employees. Genies can also be viewed as a reporting tool since the information they display is exportable to *Microsoft Excel*. There are five Genies for supervisors and job aids for each Genie on the CalTime website:

- **Non-Exempt Pay Period Approval** includes information about employee and supervisor approvals, **ID**, **Name**, **Title Code**, **Manager**, **Missed Punches**, amount of **Reg.** hours worked, amount of **Overtime**/**Comp Time**, **Holidays**, **Vacation** and **Sick Leave Taken**, and **Other Pay Codes**.
- **Timecard Exceptions** displays exceptions such as late and early ins, late and early outs, missed punches, missed shifts, and overtime.
- **Exempt Leave Usage Approval** shows a list of all exempt employees, the leave they have taken during the previous pay period (default, though this time frame can be changed), and whether or not they have approved their timecards.
- **Worked Accounts** lists your Friendly Name accounts and employee hours linked to those accounts.
- **QuickFind** allows you to search for and find individual employee information quickly and easily.
- **Custom Fields Summary** provides information about the employee, such as **ID**, **Name**, **Title Code**, **Appt. Type**, **Home Dept.**, **Comp Time Elect.**, **Meal Length**, **Shift Length**, and **Shift Occurrence**.
- **Accrual Leave Balances** provides information about your employees' accrual leave balances. It defaults to a **Time Period** of **Today** for the most current data.

Show and Time Period Drop Lists



The **Show** and **Time Period** drop list menus appear at the top, center of all **Genies**.

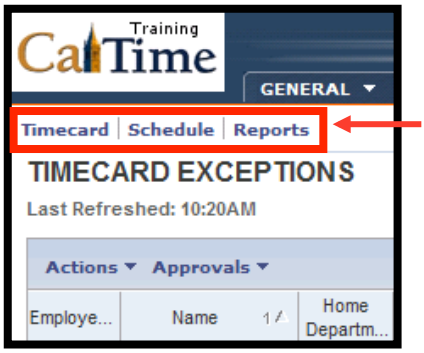
Use the **Show** drop list to select the group of employees you wish to display.

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 *all* **Genies**:

- **Timecard**, which displays timecards for one or more selected employees
- **Schedule (RDP *only*)** , which allows you to apply and modify schedules
- **Reports**, which allows you to run reports for one or multiple selected employees, such as the **Accrual Detail, Exceptions,** or **Time Detail reports**

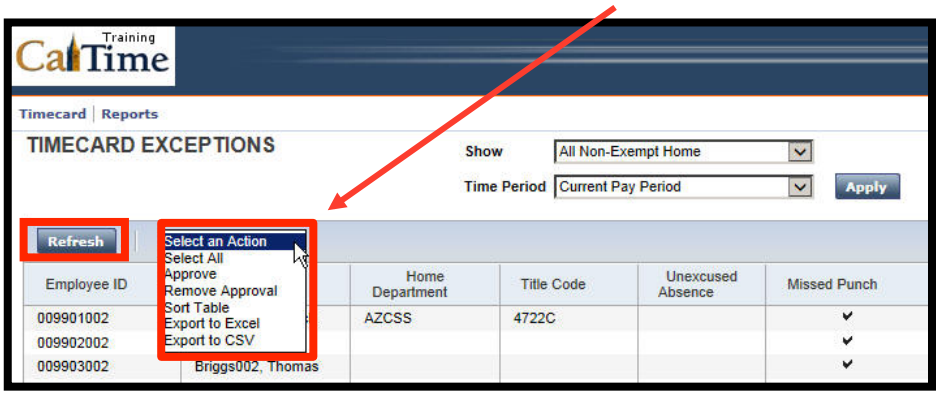


You can select one employee, and click the **Timecard** quick link to access his or her timecard. Or, you can select multiple employees and click the **Timecard** quick link to view timecards for just those employees whom you selected.

Command Options

The **Command options** are button- and drop-list-based tasks that you can perform on the page. Each option is specific to the page you are currently viewing. The following illustration show such an option in RDP-access view: **Refresh** and **Select an Action**.

Select an Action links to a drop-list menu, as you can see below:



Selecting Employees

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

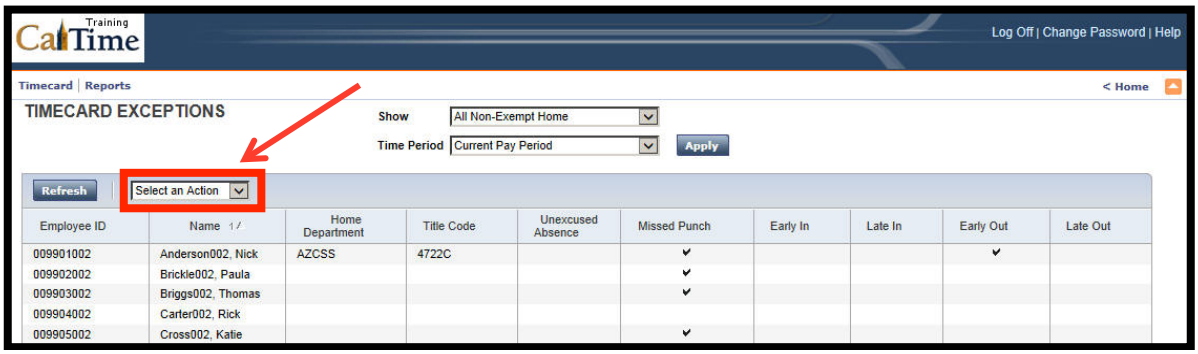
Option 1: In the workspace area, highlight the employees for whom you need to access data by clicking your cursor on a particular employee row.

Option 2: Click-and-drag the mouse to select multiple contiguous employees.

Option 3: Use the **Ctrl** key to select more than one employee not listed next to each other (**Command**-click on the Mac).

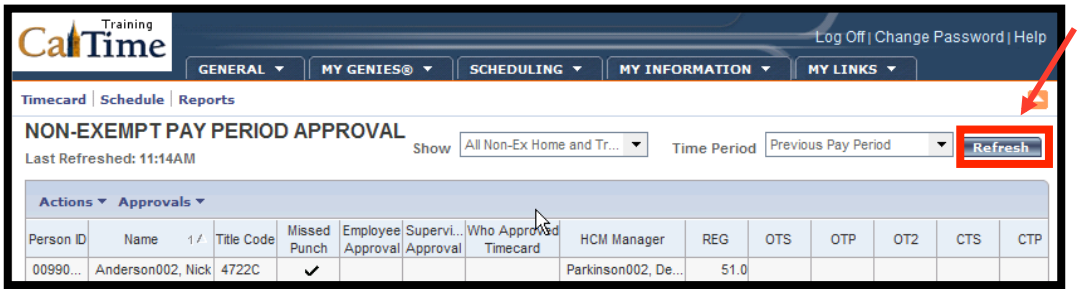
Option 4: Use the **Shift** key to select all employees listed between two employees, including the two employees.

Option 5: Use **Select All** in the **Select an Action** menu (Web access) or the **Actions** menu (RDP access).



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 resulting number (usually "**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.

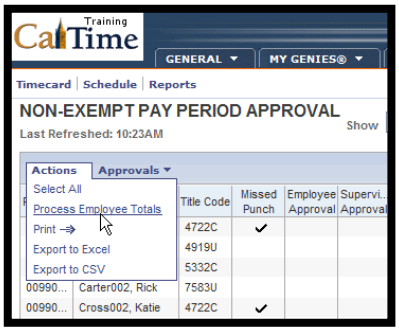


Note: There is a **Refresh** link in the command buttons bar on each employee's **Timecard** page.

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.

Actions Menu

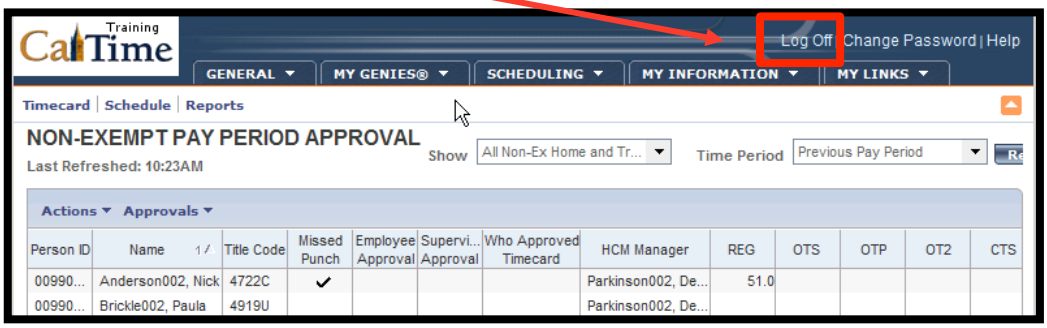
Use the Actions menu to select all employees, export data to *Microsoft Excel* or a CSV file, and approve timecard or remove timecard approval.



Logging Off

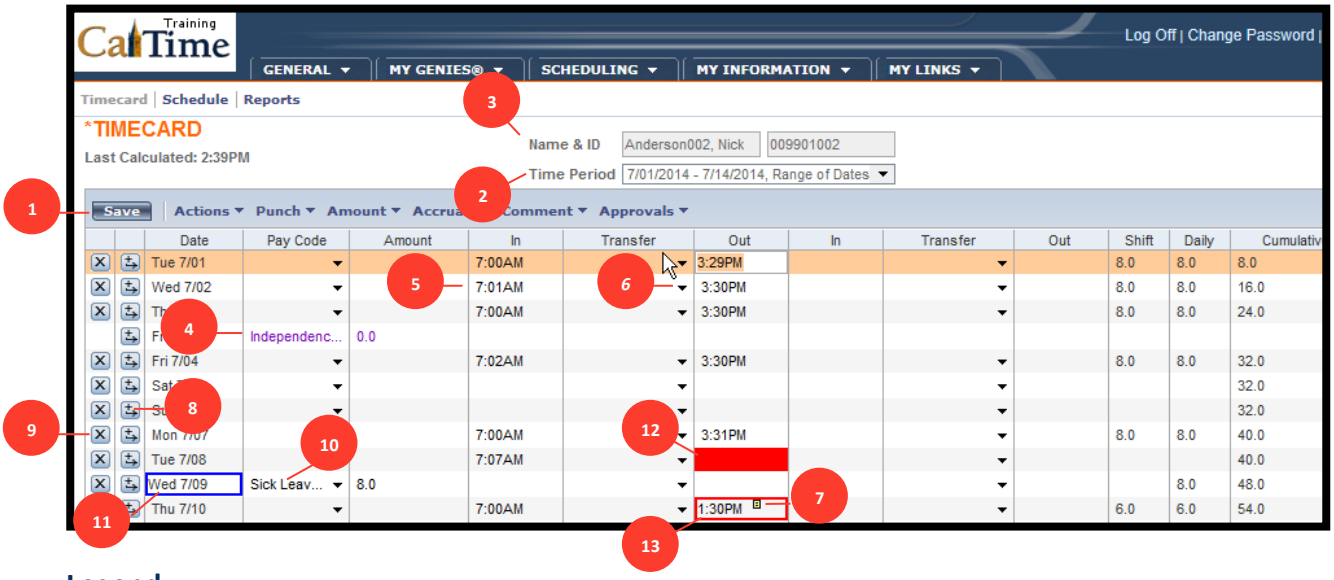
Once your work is complete, use the **Log Off** link to exit CalTime and end your session.

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:



RDP-Access Timecards_____

A CalTime employee's **RDP-access** timecard is shown below:



Legend

1..... Command buttons

2..... Time Period

3..... Employee Name and ID#

4..... Holiday

5..... In Punch

6..... Out Punch

7..... Comments

8..... Add a Row button

9.....Delete a Row button

10.....Pay Code

11.....Missed Shift (*employee has a schedule*)

12.....Missed Punch

13..... Early Out Punch (*employee has a schedule*)

Exceptions and Actions

CalTime exceptions and actions for both Web and RDP include missed punches, early and late ins, early and late outs, missed shifts, excused absences, system-added data (*e.g.*, holidays), and comments.

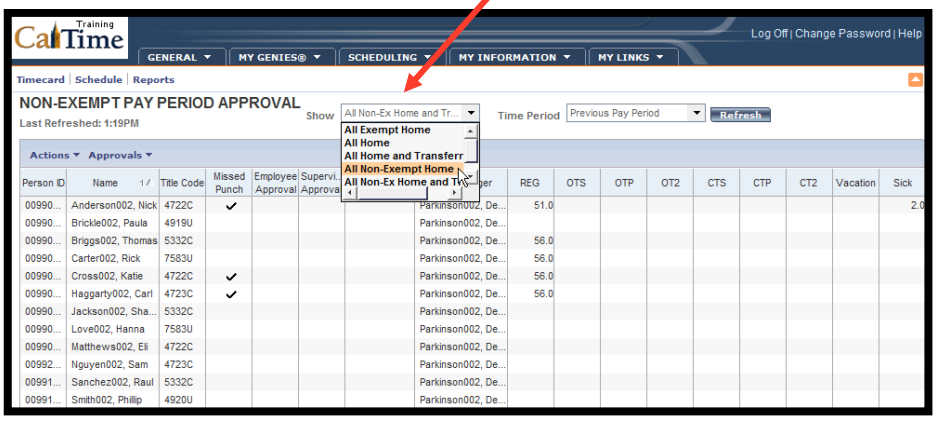
	Missed punch (in or out punch is missing)
	Early or late punch (early/late in-punch or out-punch)
	Excused absence (*action*)
Holiday	System-added data (*e.g.*, holidays)
	Comments (*action*)
*TIMECARD	Changed data is not saved (orange "TIMECARD" or Genie name, *action*)

All of the above exceptions and actions are displayed in the preceding **RDP-access** illustration. Note the comment icon in the Out punch for **Thu 7/10**.

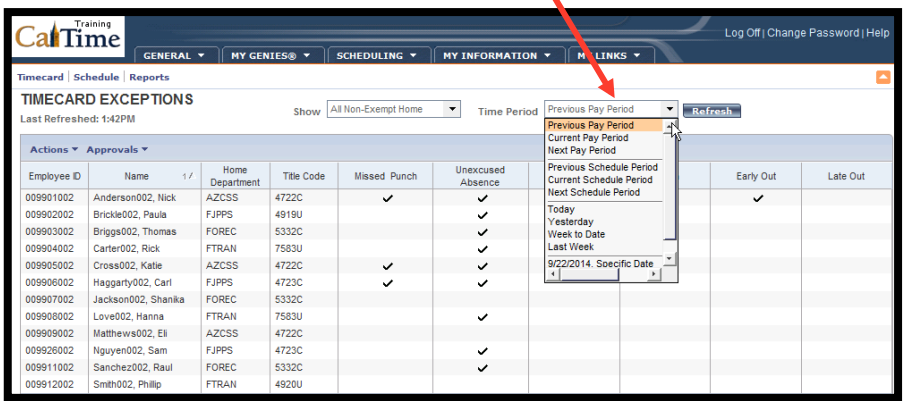
RDP Screens for Genies and Timecards

The following illustrations show the RDP access screens for Genies. In Genies and timecards, all columns are resizable by clicking and dragging the right border of the column.

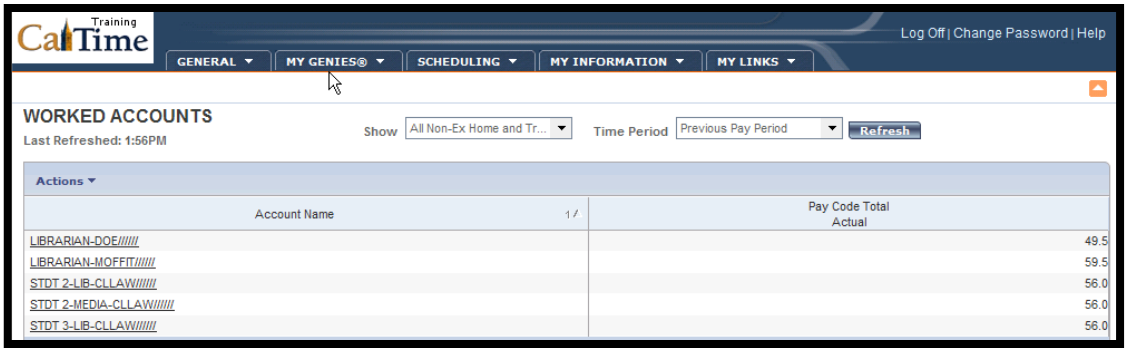
CalTime RDP will open to the **NON-EXEMPT PAY PERIOD CLOSE GENIE**. In order to view non-exempt employees from within this Genie, choose **Show** > **All Non-Exempt Home**. It will default to **Previous Pay Period**.



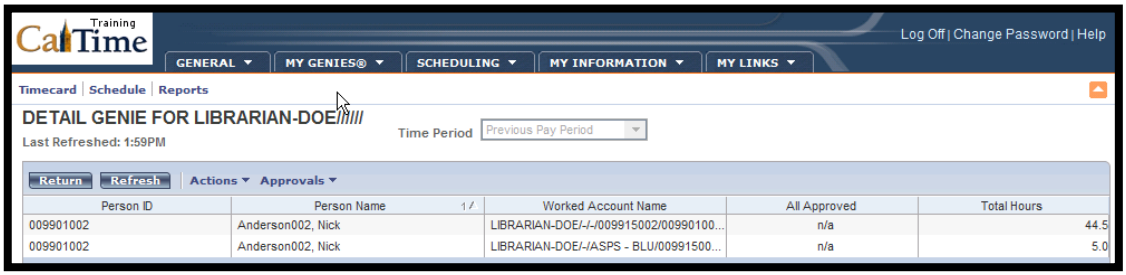
This is the **TIMECARD EXCEPTIONS** Genie. From the **Time Period** drop list, pick a time frame in which to view timecards, *e.g.*, current pay period, today, or unsigned-off previous pay period.



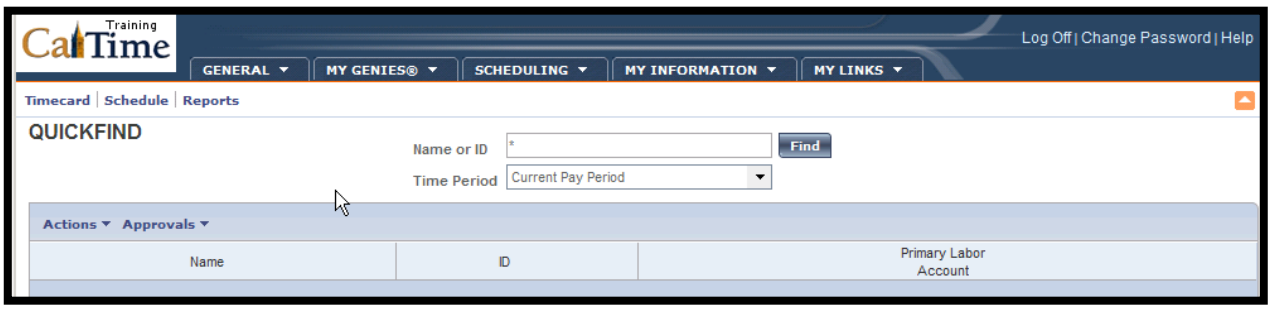
Next you can view the **WORKED ACCOUNTS** Genie, which shows jobs and hours reported. To see a breakdown by employee hours, double-click on the **Account Name** (*see the illustration at the top of the following page*).



NOTE: This Genie is not available in the Web access version of CalTime.

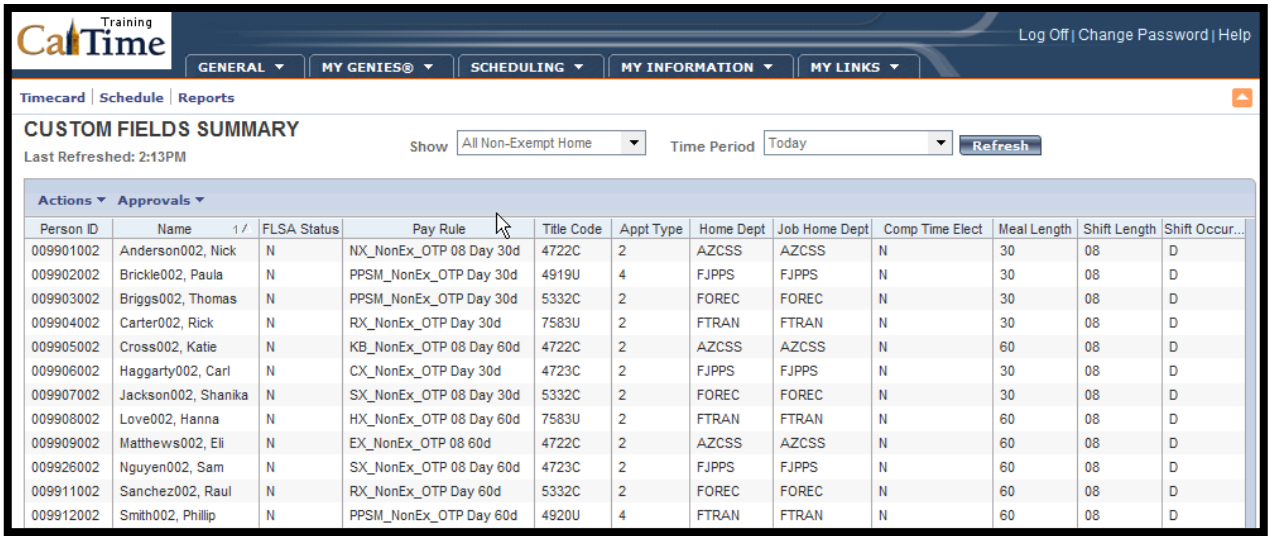


The subsequent Genie is **QUICKFIND**, which is used to quickly navigate to a single timecard.



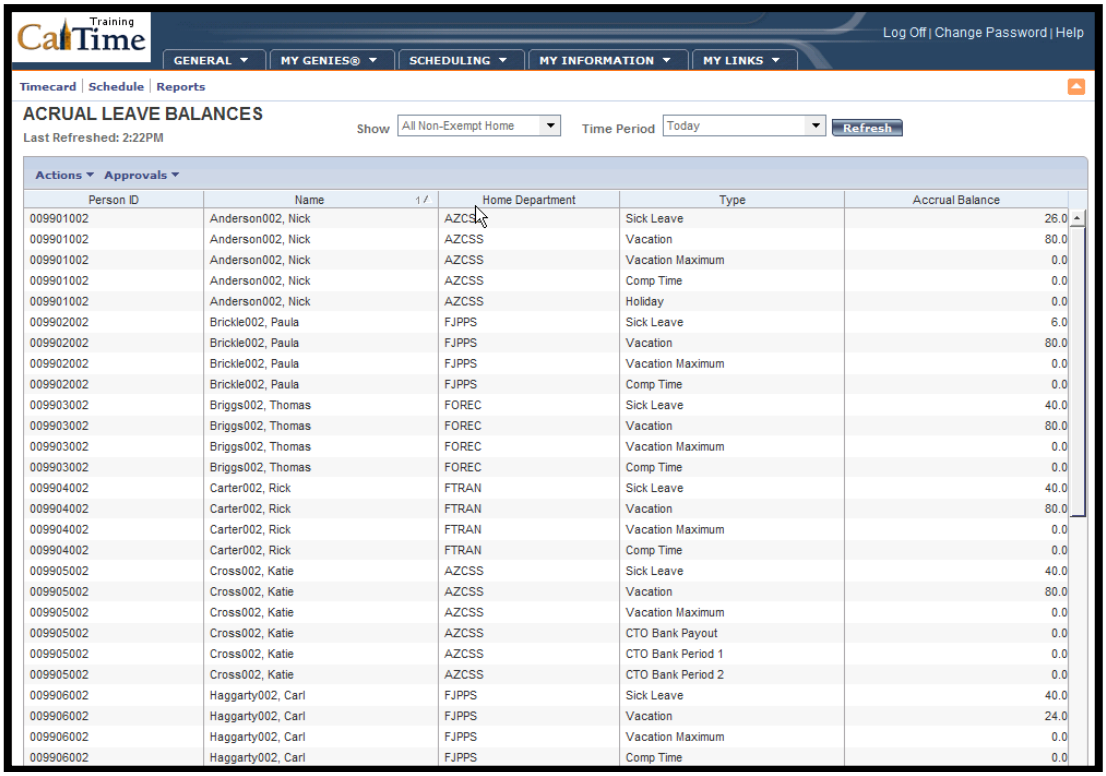
NOTE: Type an employee's last name, followed by as asterisk (*e.g.*, anderson*) to go to find an employee with the last name of Anderson. Once you have found the correct employee, double-click on his/her name to open the timecard.

The next Genie in the list is **CUSTOM FIELDS SUMMARY**, in which you can see an employee's ID, name, FLSA status, Pay Rule, Title code, Appt type (4s are students), Home Dept, Job Home Department, Comp time elective, meal length, shift length, and Shift occurrence.



Person ID	Name	FLSA Status	Pay Rule	Title Code	Appt Type	Home Dept	Job Home Dept	Comp Time Elect	Meal Length	Shift Length	Shift Occur...
009901002	Anderson002, Nick	N	NX_NonEx_OTP 08 Day 30d	4722C	2	AZCSS	AZCSS	N	30	08	D
009902002	Brickle002, Paula	N	PPSM_NonEx_OTP Day 30d	4919U	4	FJPPS	FJPPS	N	30	08	D
009903002	Briggs002, Thomas	N	PPSM_NonEx_OTP Day 30d	5332C	2	FOREC	FOREC	N	30	08	D
009904002	Carter002, Rick	N	RX_NonEx_OTP Day 30d	7583U	2	FTRAN	FTRAN	N	30	08	D
009905002	Cross002, Katie	N	KB_NonEx_OTP 08 Day 60d	4722C	2	AZCSS	AZCSS	N	60	08	D
009906002	Haggarty002, Carl	N	CX_NonEx_OTP Day 30d	4723C	2	FJPPS	FJPPS	N	30	08	D
009907002	Jackson002, Shanika	N	SX_NonEx_OTP 08 Day 30d	5332C	2	FOREC	FOREC	N	30	08	D
009908002	Love002, Hanna	N	HX_NonEx_OTP 08 Day 60d	7583U	2	FTRAN	FTRAN	N	60	08	D
009909002	Matthews002, Eli	N	EX_NonEx_OTP 08 60d	4722C	2	AZCSS	AZCSS	N	60	08	D
009926002	Nguyen002, Sam	N	SX_NonEx_OTP 08 Day 60d	4723C	2	FJPPS	FJPPS	N	60	08	D
009911002	Sanchez002, Raul	N	RX_NonEx_OTP Day 60d	5332C	2	FOREC	FOREC	N	60	08	D
009912002	Smith002, Phillip	N	PPSM_NonEx_OTP Day 60d	4920U	4	FTRAN	FTRAN	N	60	08	D

The final Genie is **ACCRUAL LEAVE BALANCES**, which gives you the same information as the **Accrual leave Balances Summary report**.

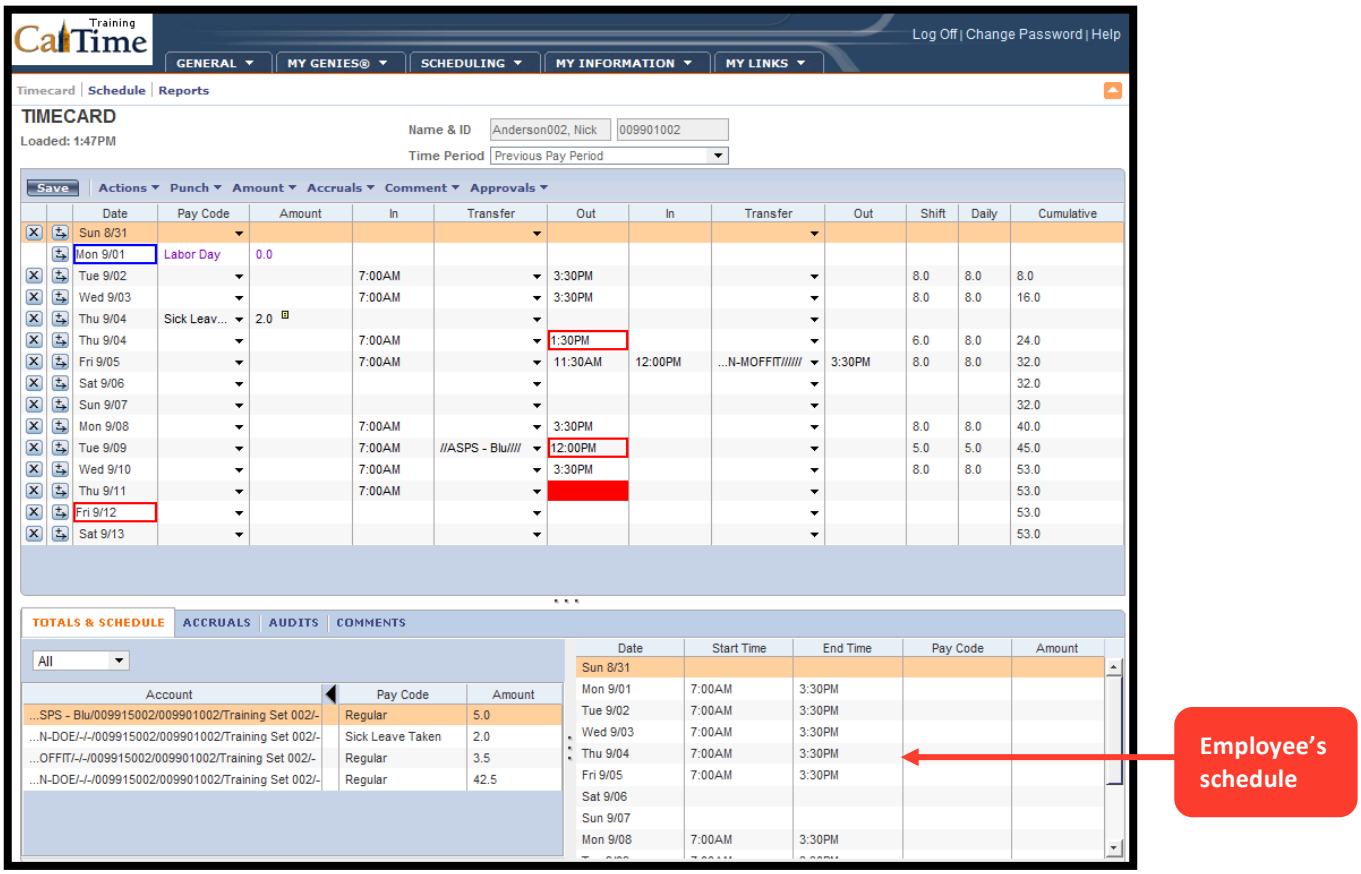


Person ID	Name	Home Department	Type	Accrual Balance
009901002	Anderson002, Nick	AZCSS	Sick Leave	26.0
009901002	Anderson002, Nick	AZCSS	Vacation	80.0
009901002	Anderson002, Nick	AZCSS	Vacation Maximum	0.0
009901002	Anderson002, Nick	AZCSS	Comp Time	0.0
009901002	Anderson002, Nick	AZCSS	Holiday	0.0
009902002	Brickle002, Paula	FJPPS	Sick Leave	6.0
009902002	Brickle002, Paula	FJPPS	Vacation	80.0
009902002	Brickle002, Paula	FJPPS	Vacation Maximum	0.0
009902002	Brickle002, Paula	FJPPS	Comp Time	0.0
009903002	Briggs002, Thomas	FOREC	Sick Leave	40.0
009903002	Briggs002, Thomas	FOREC	Vacation	80.0
009903002	Briggs002, Thomas	FOREC	Vacation Maximum	0.0
009903002	Briggs002, Thomas	FOREC	Comp Time	0.0
009904002	Carter002, Rick	FTRAN	Sick Leave	40.0
009904002	Carter002, Rick	FTRAN	Vacation	80.0
009904002	Carter002, Rick	FTRAN	Vacation Maximum	0.0
009904002	Carter002, Rick	FTRAN	Comp Time	0.0
009905002	Cross002, Katie	AZCSS	Sick Leave	40.0
009905002	Cross002, Katie	AZCSS	Vacation	80.0
009905002	Cross002, Katie	AZCSS	Vacation Maximum	0.0
009905002	Cross002, Katie	AZCSS	CTO Bank Payout	0.0
009905002	Cross002, Katie	AZCSS	CTO Bank Period 1	0.0
009905002	Cross002, Katie	AZCSS	CTO Bank Period 2	0.0
009906002	Haggarty002, Carl	FJPPS	Sick Leave	40.0
009906002	Haggarty002, Carl	FJPPS	Vacation	24.0
009906002	Haggarty002, Carl	FJPPS	Vacation Maximum	0.0
009906002	Haggarty002, Carl	FJPPS	Comp Time	0.0

NOTE: This Genie is not available in the Web access version of CalTime, but the report is available in both Web and RDP access.

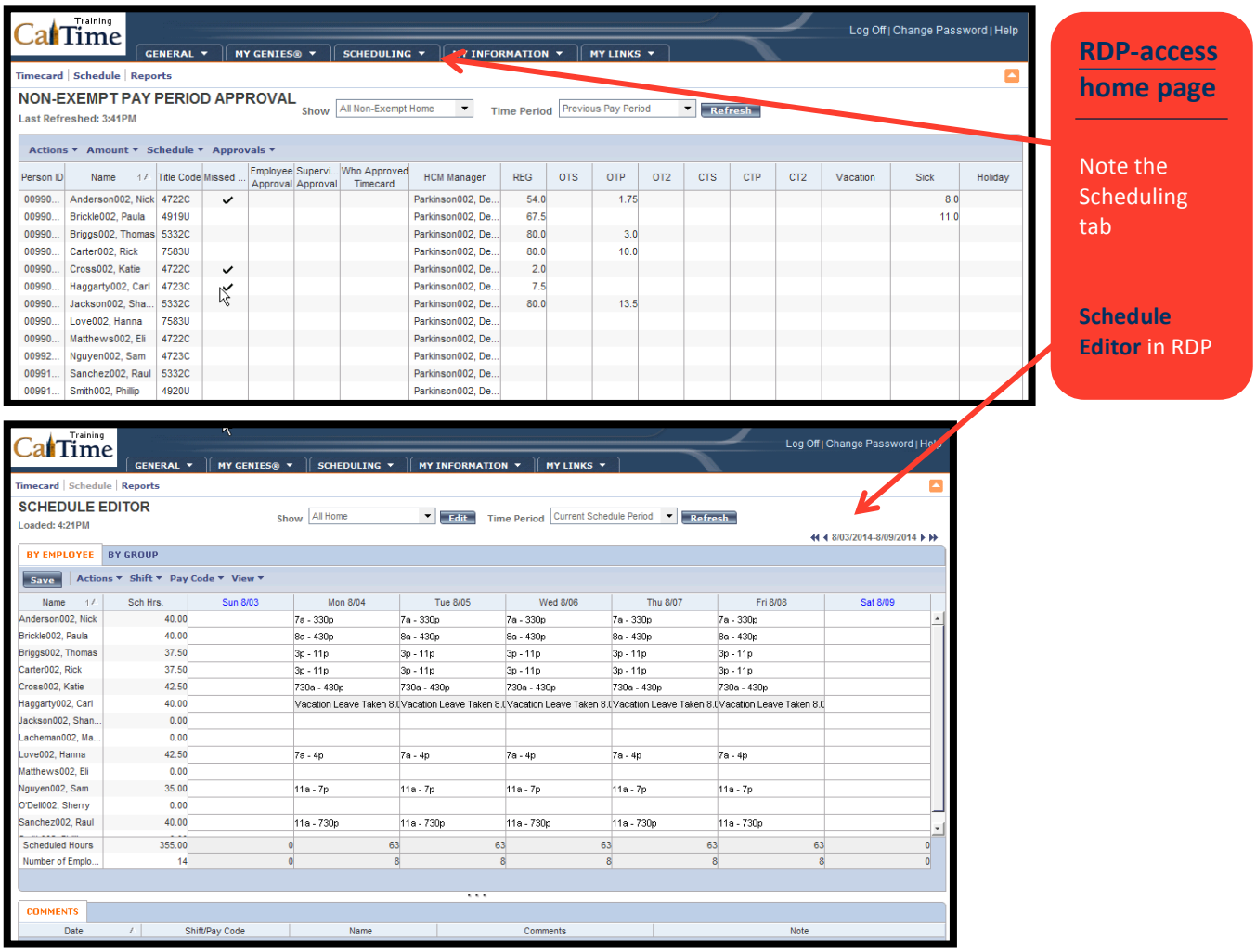
Schedule Window in a Timecard

In the following illustration, you see an RDP view of an employee's timecard. This is an employee with a CalTime schedule, which is displayed in the lower right corner. If you are NOT using CalTime schedules, your employees' schedule windows will be empty. *The schedule window is not available on timecards in the Web version of CalTime.*



RDP Screen for Schedule Editor_____

The following illustrations show the Schedule Editor tab and Schedule Editor home screen in RDP access. *Schedule Editor is not available in Web-access CalTime*.



For more information RDP scheduling, see the job aid, “Using Schedule Editor”.

Additional Responsibilities_____

Depending on your department, there are many variables for which you will be responsible. Check with your manager for additional information.