CalTime

INSTRUCTIONAL GUIDE

Timekeeping for Supervisors: Managing Biweekly and hourly paid Employees Time

MAY 11, 2020

UNIVERSITY OF CALIFORNIA, BERKELEY

Kronos Version 8.1

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INTRODUCTION

Welcome to CalTime, UC Berkeley's timekeeping system. This manual is a step-by-step user guide for Supervisors of biweekly and hourly paid (many are eligible for overtime with the exception of exempt readers and tutors)

With CalTime, you can:

- Access your employees timecard from any computer
- Adjust (hours) hours worked and any time off (leave) your employee has recorded
- Approve your employees timecard at the end of each pay period
- Have visible access to your employee's time worked and leave.
- View your employee's vacation, sick leave, and comp time balances and total hours worked.
- Assign schedules

TRAINING

Brief and concise training videos are available to help familiarize yourself with the different roles within CalTime. These YouTube video tutorials are available at the Caltime website located at http://caltime.berkeley.edu/home. In addition, individual job aids designed based on task and employee role can be found at http://caltime.berkeley.edu/training.

ROLES AND RESPONSIBILITIES

There is a shared responsibility between the employee and supervisor to ensure employees time and leave is reported accurately and approved.

For each biweekly pay cycle employees are required to:

- Record time and or leave
- Record time worked against the proper job (if employee has multiple jobs), contract or grant
- Approve their timecard by the employee approval deadline

Supervisors are responsible for:

- Reviewing every timecard to ensure their employee's time is accurately recorded and complete
- Work with employee to resolve errors (i.e. missed punches, meal break adjustments, correct job)
- Approve the timecard by the supervisor approval deadline (typically the Monday following the close of the biweekly pay period). 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).

Approval Deadline

The biweekly pay cycle is a 2-week period that starts on Sunday at 12:00 am and ends on the second Saturday at 11:59 pm. The deadline for approval is the employee's last work day of the biweekly pay period (which closes on Saturday at 11:59 pm.) For example, if your last day worked is Friday, you should review and approve your timecard by the end of the day Friday. Please note that the approval deadline may shift due to holidays. You will be notified if the approval deadline changes for a particular pay period. Approval deadlines are posted at caltime.berkeley.edu. An approval reminder will be sent to your Berkeley email address on the Friday before the pay period closes.

By the end of the day on Monday following the biweekly pay period close, the supervisor will review their employee's timecard for accuracy and approve it if no adjustments need to be made. Once the supervisor approves the timecard, it is locked from further changes. If an employee needs to make a last minute edit to their timecard and the supervisor has already approved the timecard, the supervisor will need to remove their approval before any further edits can be made by the employee.

ABOUT YOUR EMPLOYEE

Employees Types (RealTime vs. AnyTime)

There are different types of employees in CalTime.

"RealTime" Employees:
All RealTime employees enter their start and stop times and transfers as they occur in real time (i.e. students). There are two types of RealTime employees:

- RealTime employees that use a computer to record time
- RealTime employees that use a Timeclock to record time

"AnyTime" Employees:
Anytime employees only use a personal computer (PC) to record time and may enter their start and stop times, transfers, and leave anytime during the biweekly pay period.

Pay rules

Pay rules are essentially the rules that govern how your employee's time is calculated and is automatically setup when the employee imports into CalTime. The rules are driven by the following:

- Union affiliation or unrepresented
- FLSA status: Non-exempt versus exempt
- Overtime or Compensatory Time
- Type of Work day: eight, ten, or 12 hour work day
- Type of shift: day, evening, or weekend shift
- Meal break: 30, 60, zero minute meal deduction

If the employee has a shift that deviates from any of their pay rules above such as they took a 30 minute lunch instead of their standard 60 minute lunch, this will require the supervisor to process a work-rule transfer (if it is a temporary change) or contact their timekeeper (if it is a permanent change). How to process a work rule transfer is discussed in more detail later in this manual.

Your Primary Job

In CalTime, each employee has a defined primary job (applies when employees have multiple jobs), which comes from the Human Resource System also known as the Human Capital Management system (HCM). When you enter time, **CalTime will automatically charge the time against your primary job**, unless you direct CalTime to charge another job, contract or grant. Each job could be tied to different funding sources or chart strings.

Friendly Names

In order to track employee jobs, a brief description typically comprised of department ID, job code and employee record number known as a **Friendly Name** is assigned to an employee. Each job has a Friendly name created which is connected to your pay rate and where your job should be charged to.

Rounding and Grace Periods for Time Recorded

For start and end of each day/shifts, all time stamps collected via CalTime are rounded according to a seven-minute grace period before and after each quarter hour mark. The grace period is 7 minutes before the quarter hour and 7 minutes after the quarter hour.
Examples: If an employee punches in at 7:23am, the system records and displays the time in CalTime as 7:23am, but for the purposes of calculating the number of hours to be paid, the system will round the

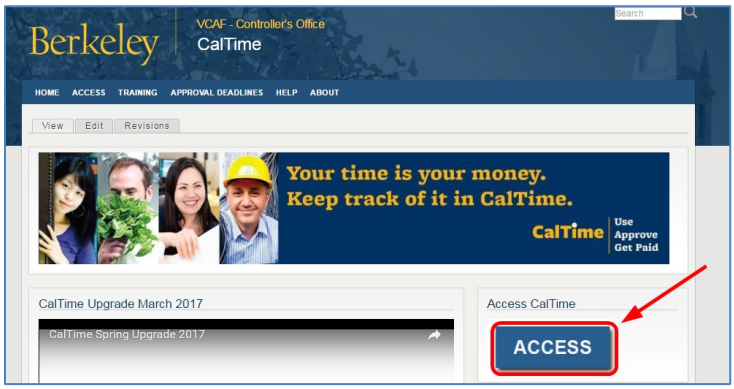
time (internally) to 7:30am. Similarly, if an employee punches out at 4:05pm, the system records and displays 4:05pm but will round the time internally to 4:00pm.

CHART OF HOW ROUNDING WILL BE APPLIED	
Grace Period (Punch in or out time)	Quarter Hour (Time Used to Calculate Pay)
:53 to :07 (e.g., 6:53am to 7:07am)	00 (e.g., 7:00 am)
:08 to :22 (e.g., 7:08am to 7:22am)	15 (e.g., 7:15 am)
:23 to :37 (e.g., 7:23am to 7:37am)	30 (e.g., 7:30 am)
:38 to :52 (e.g., 7:38am to 7:52am)	45 (e.g., 7:45 am)

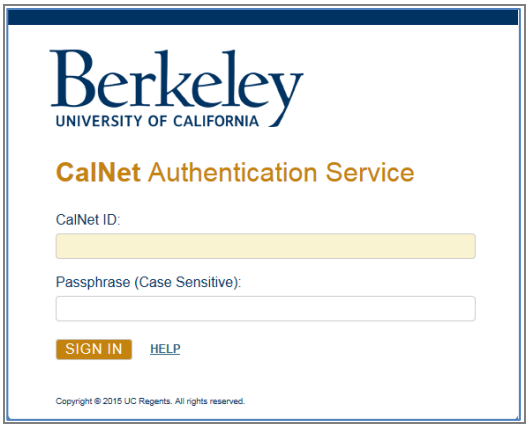
ACCESSING AND NAVIGATING IN CALTIME

Log in and Log out of CalTime

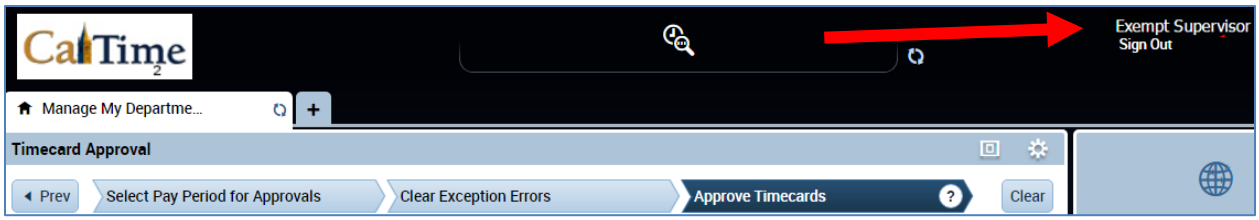
Using Internet Explorer, Google Chrome, Firefox, or Safari, to the CalTime website at http://caltime.berkeley.edu/. Click on the ACCESS button on the main page.



Complete the Calnet Authentication process by entering you Calnet ID and Passphrase.

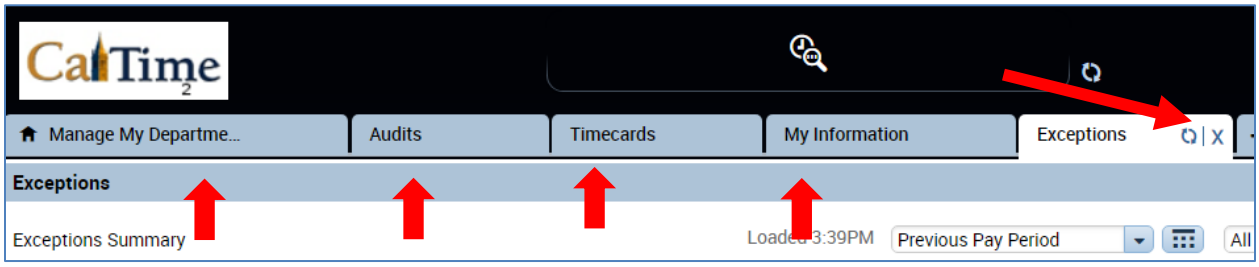


To Log out of CalTime, click on Sign Out at the top right of the CalTime webpage. Please properly log out when exiting CalTime and refrain from simply closing your webpage window.

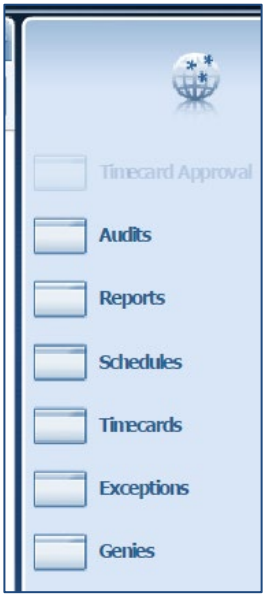


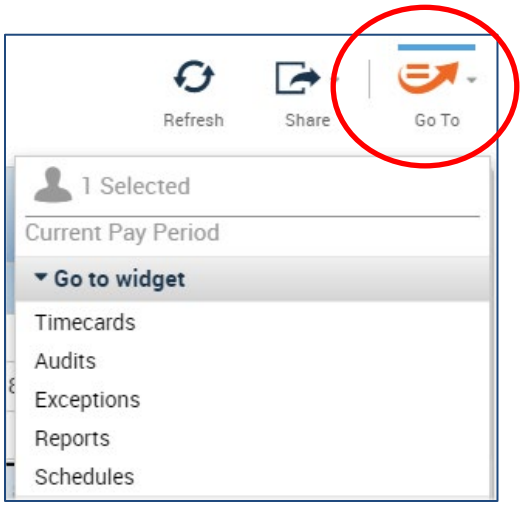
Navigating in CalTime

In CalTime, you can easily navigate between different tabs. For Example, You can move back and forth between your employee's timecard "Timecards" and "Audits" by clicking on the tab at the top. To close the tab, click on the X symbol at the right of the Tab. The default tab that will appear each time you login to CalTime is **Management My Department** however you can open new tabs by clicking on the options shown in the blue panel below.



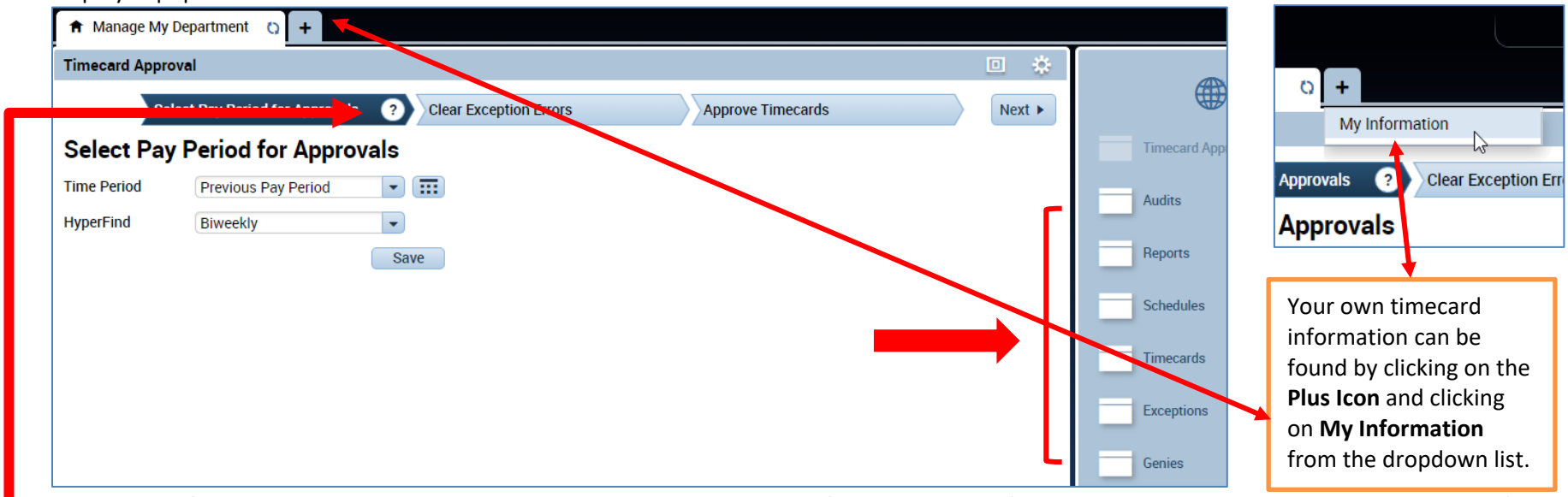
The blue panel at the right and the Go To icon (displayed on several pages such as management my Department and Timecards) are your quick access links to various information such as reports, schedules, exceptions, and audits.





DEFAULT HOME PAGE: MANAGEMENT MY DEPARTMENT AND APPROVAL PROCESS

The **Manage My Department** Tab will immediately open after logging into CalTime and is your default page. It will enable you **Select a Pay period**, review any errors for your staff (for the prior pay period that just closed) and enable you to approve timecards. The **Manage My Department** tab is most useful on the supervisor approval day (Monday). You will be prompted to **Select a Pay period** for Approvals. In addition, there is a **HyperFind** field to select your employee population.



To the right of the Timecard Approval window is a blue panel which has the following options (each will be reviewed in detail later in this guide):

Audits: Log of any edits made to the employees timecards

Reports: Enables you to run the a report of your employees time and/or leave accruals

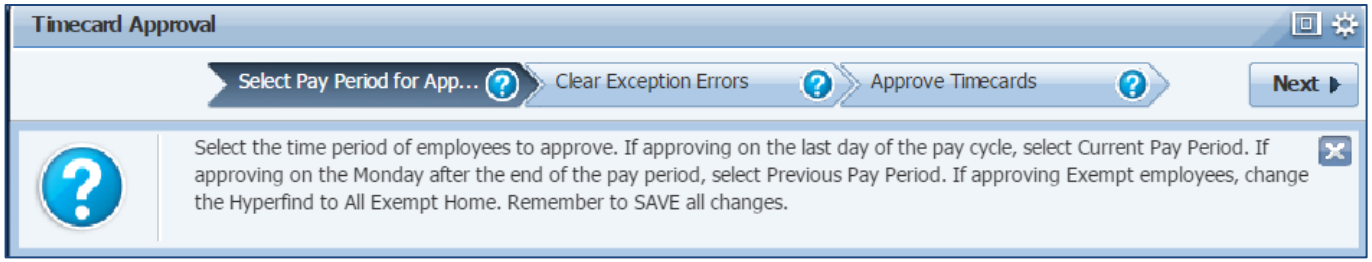
Schedules: Enables you to setup or modify a schedule for your employee

Timecards: Enables you to immediately view your employee's timecard

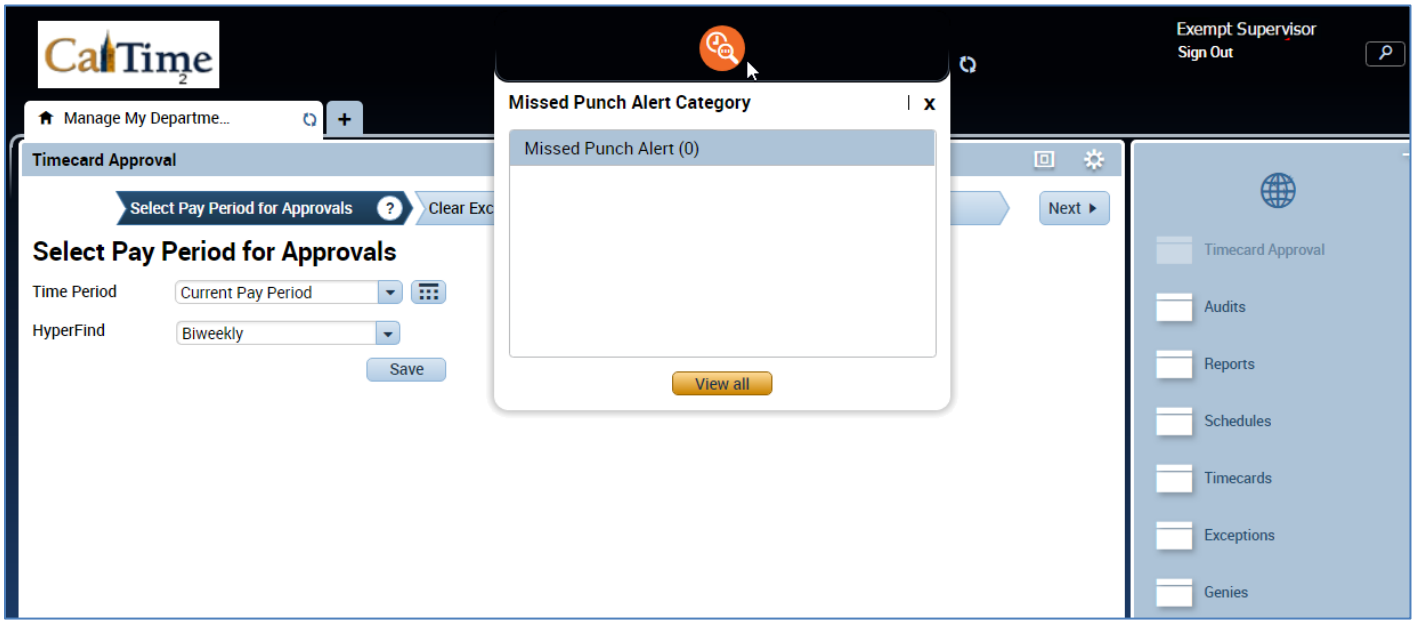
Exceptions: View a list of employees that currently have errors on their timecard such as missed punches

Genies: Opens a window displaying a summary of hours by pay type, missed punches, and approvals for your employees

If you click on the question mark, a pane will appear with brief instructions on what steps you need to take.

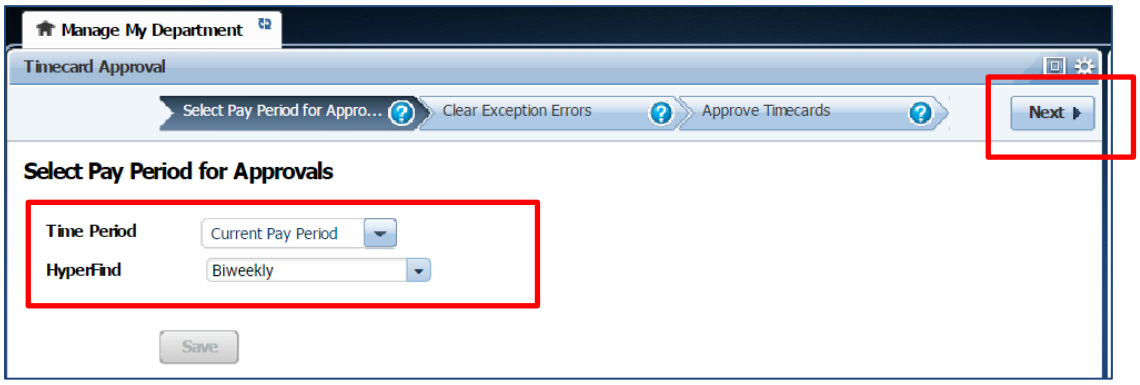


At the top of the CalTime supervisor page, there is an icon that appears that will quickly show any employees that have timecard exceptions (errors on their timecards such as missed punches) in the current pay period. You can click on this icon to view the impacted employees and correct the errors. Clearing exceptions is discussed in more detail later in this manual.



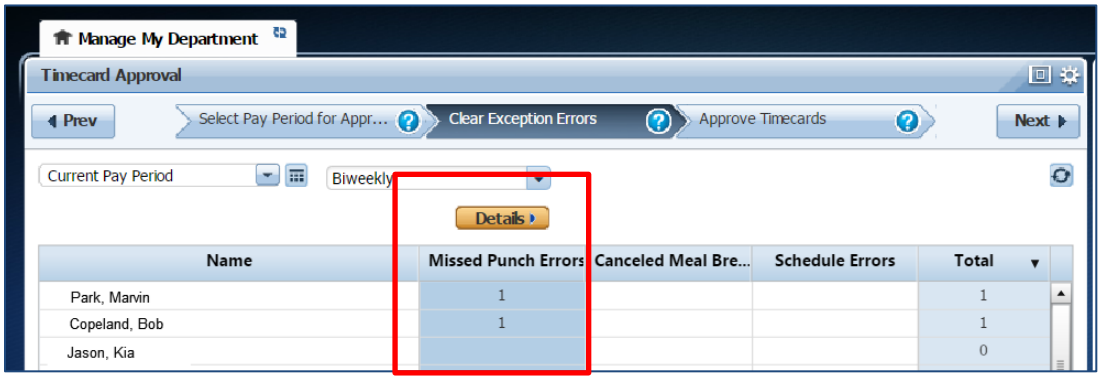
Select Pay Period for Approval

1. Select the applicable Time Period and Hyperfind
2. Click Next

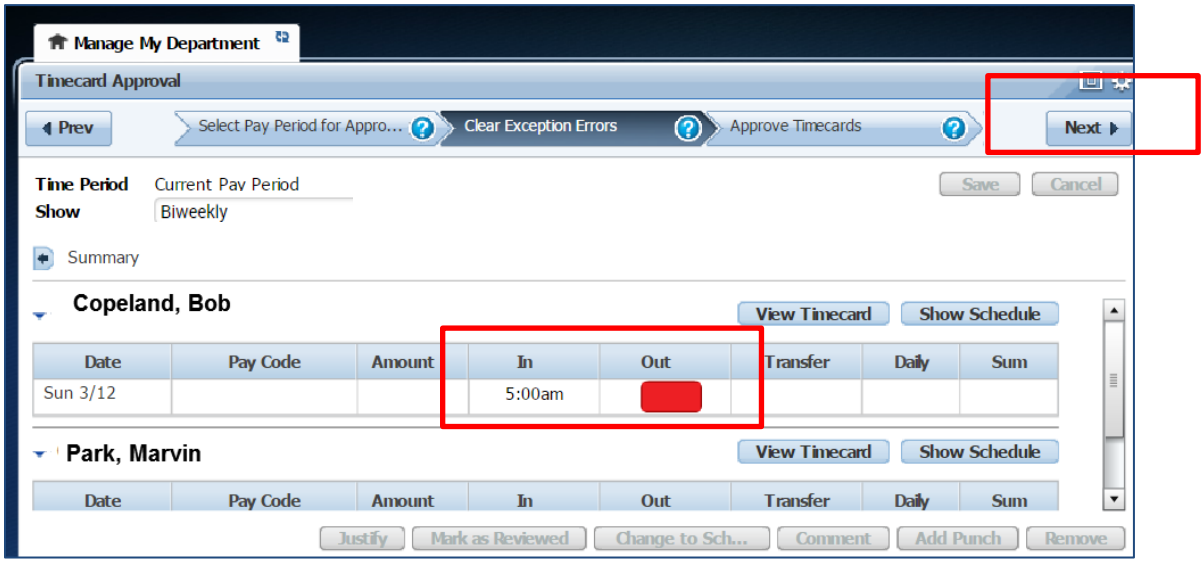


Clear Exception Errors

1. A list of employees will appear, the number of errors will appear under Missed Punched Errors, Canceled Meal Breaks and/or Scheduling errors. You can click on the yellow labeled Details field directly above the exceptions column. A list of timecard errors will appear per employee.

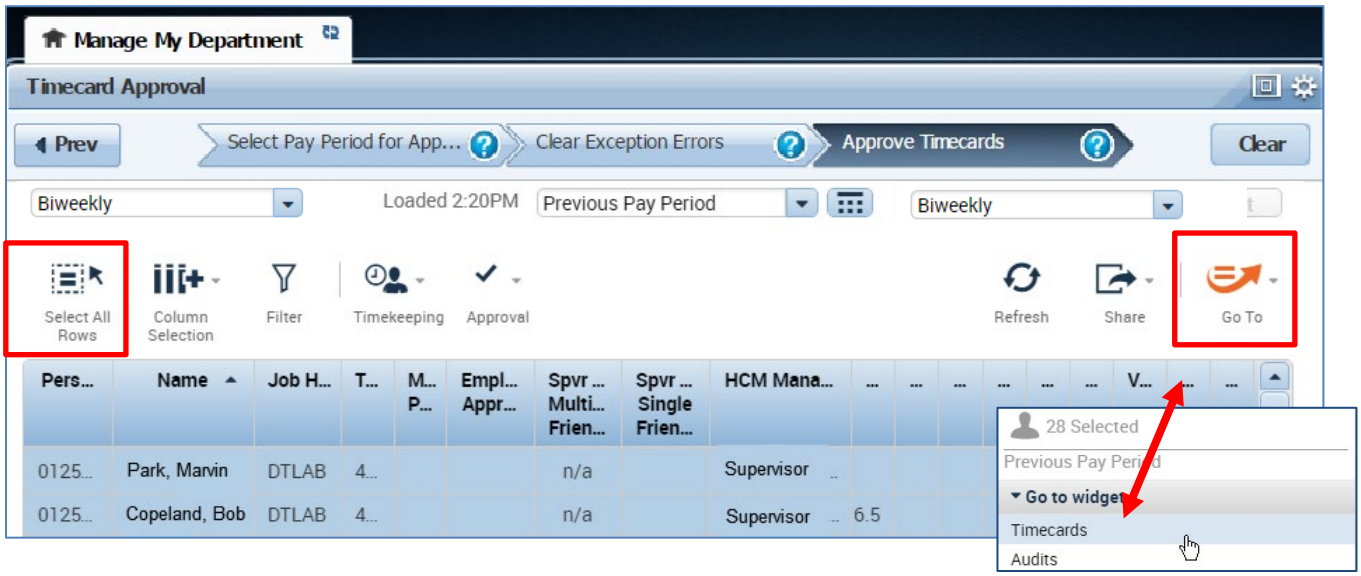


2. The employees' missed punch will appear. You may correct the error here (i.e. enter the missed punch time) or if you would like to look at the employees timecard, you can click on View Timecard and correct the error on the employees timecard. If you click on view timecard a new tab will open so that you can navigate between the timecard and the Manage My Department tab.
3. You may click in the red field and insert the correct time. Click Save at the top right. Once you save, the error will be removed from the list.
4. Repeat this process until all errors have been corrected and click next to proceed to Approve Timecards



Select Timecards for Approval

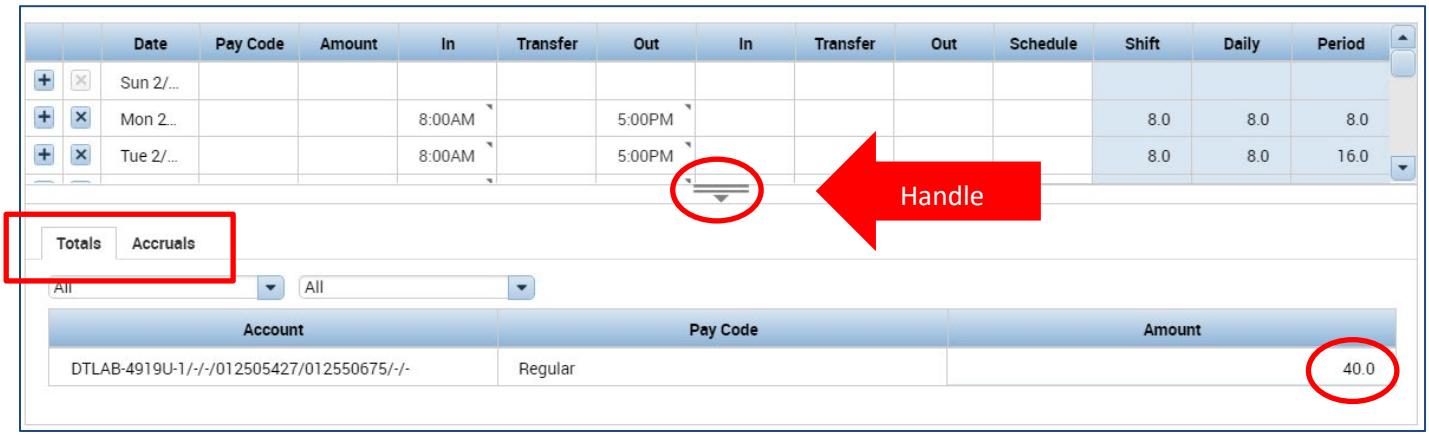
1. Click the Select All Rows icon (selected rows will be highlighted)
2. Click on the **Go To** icon and click on **Timecards**



Review Timecards for Accuracy

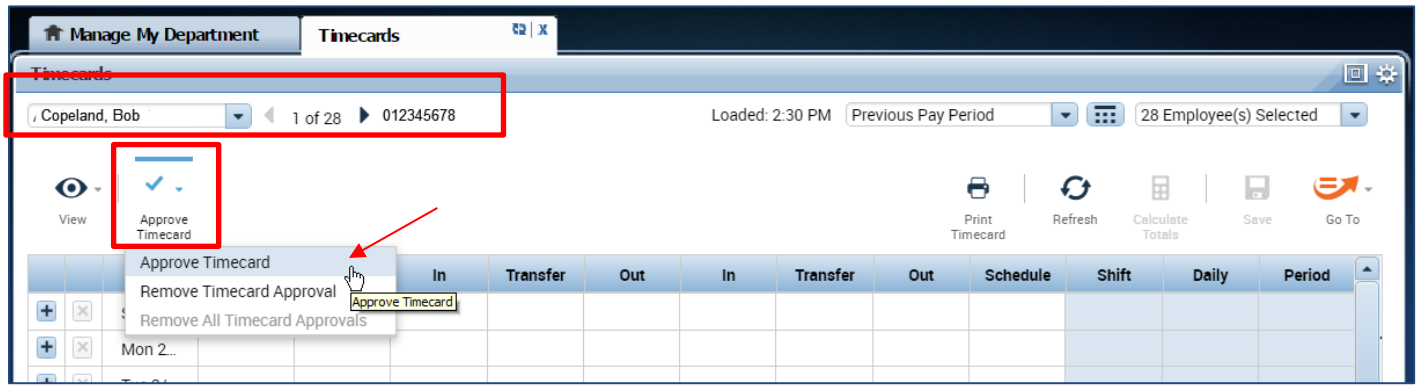
A **Timecards** new page will open enabling you to review each employee's timecard in detail and easily scroll to the next employee.

1. Remember to verify the employees hours are accurate and ensure the pay codes used appropriately categorize the type of leave.
2. Verify total hours, click on the handle which will open up a drawer feature and display the option to view timecard total hours or accruals

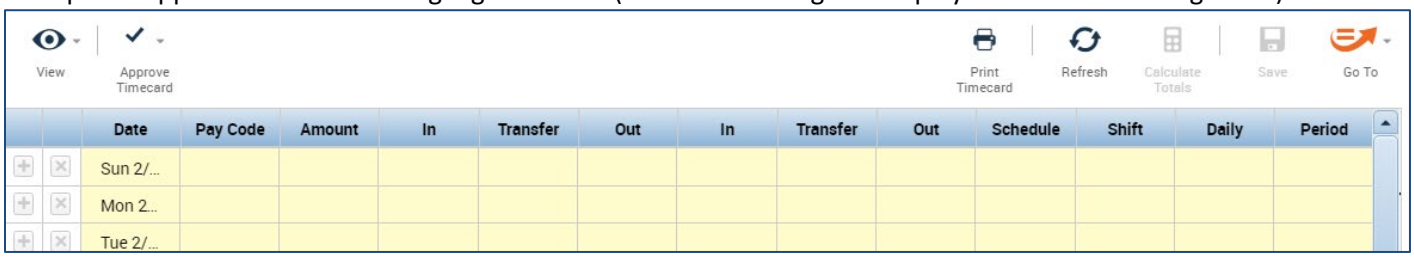


Approve Timecards

1. After verifying the timecard is complete and accurate, please proceed to approve the timecard. Employee name is available at the top left, Click on the Approve Timecard icon, Click Approve Timecard once again. To unapprove the timecard, click on Remove Timecard Approval. Once the timecard is approved, the timecard will change colors.

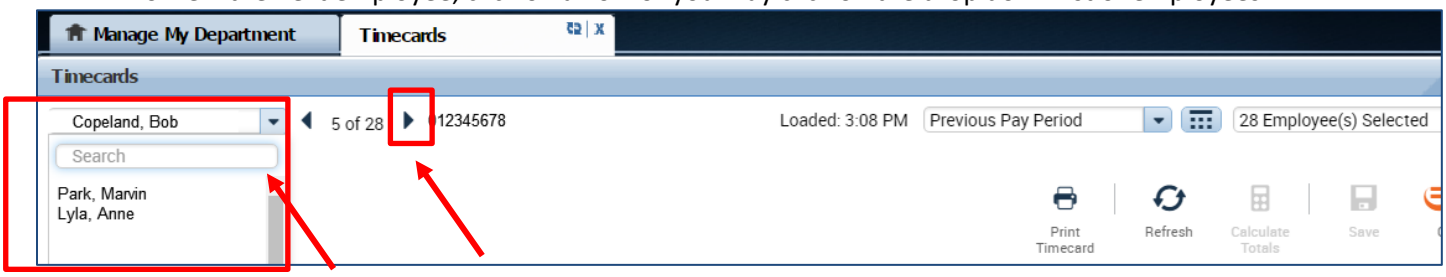


Example of Approved timecard in highlighted color (timecard no longer is displayed with white background)



Scroll to Next Employee and Repeat Approval Process

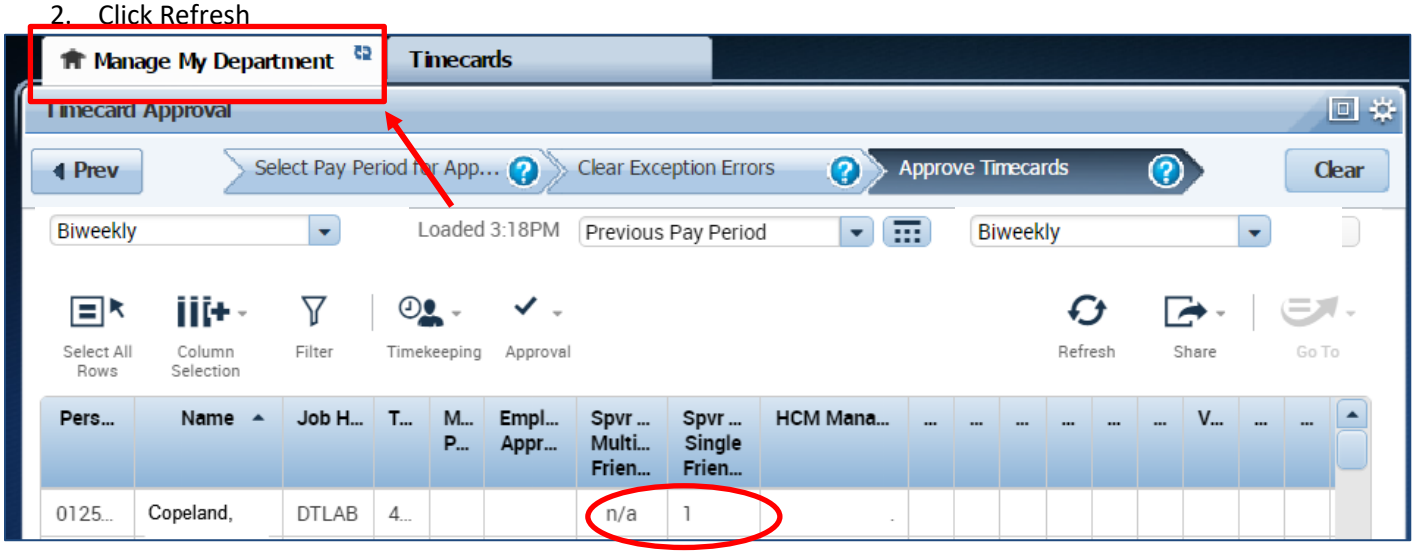
1. To view the next employee, click on arrow or you may click on the drop down list of employees.



Refresh and View Updated Supervisor Approvals on Manage My Department Tab

After all employees timecards have been approved, you may click on the Manage My Department Tab and click on Refresh and you will see the column populated with your approval.

1. Click on Manage My Department tab
2. Click Refresh



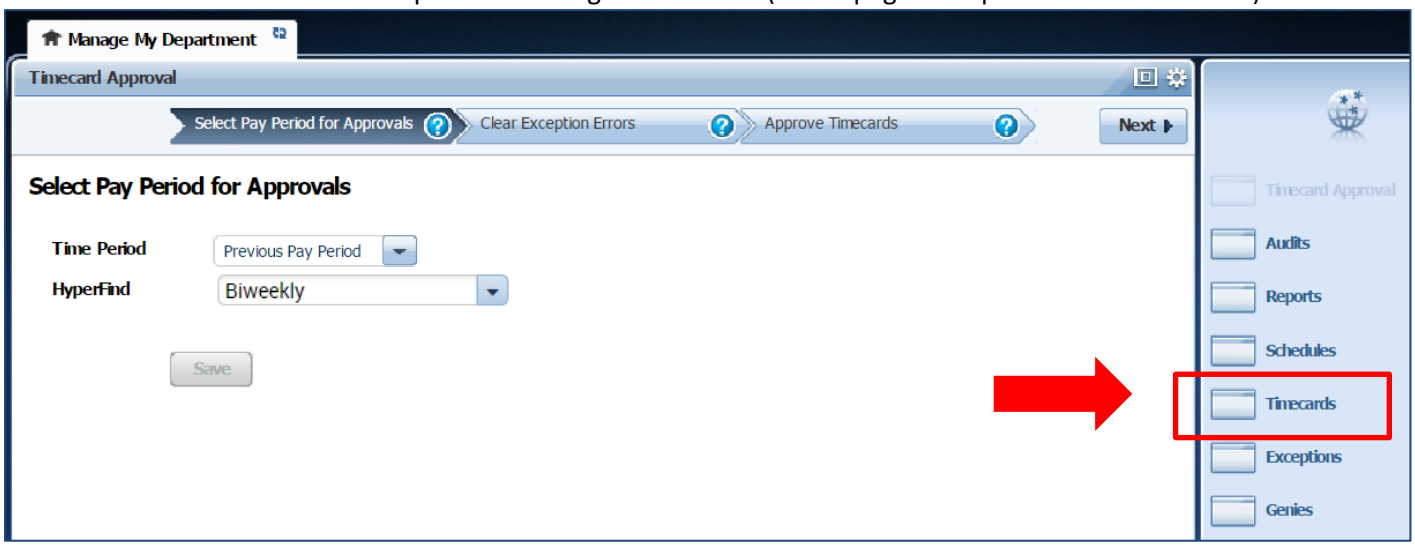
<u>Supervisor Approval Multiple Friendly names Column:</u> Reserved for employees with multiple friendly names
It will display a **check mark** (indicates at least one supervisor has approved), a **blank space** (means the timecard has not been approved), or an "**n/a**" (means the employee has only one supervisor; approval will be displayed in the following column).

<u>Supervisor Approval Single Friendly Name:</u> Reserved for employees with one friendly name
It will display the number "**1**" for each employee who has been approved by a supervisor. (It might have the number "**2**" if it has also been approved by a delegate.)
A **blank space** means no supervisor has approved.

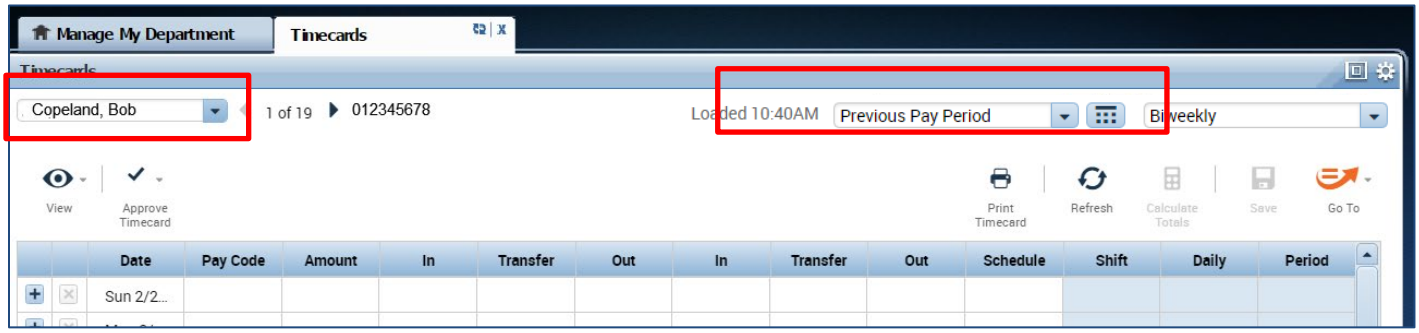
HOW TO VIEW INDIVIDUAL TIMECARDS

If you want to view an individual employee timecard, you can always click on the name of the employee if you are viewing a list of employees in CalTime. Otherwise, the easiest way to access an individual timecard is to do the following:

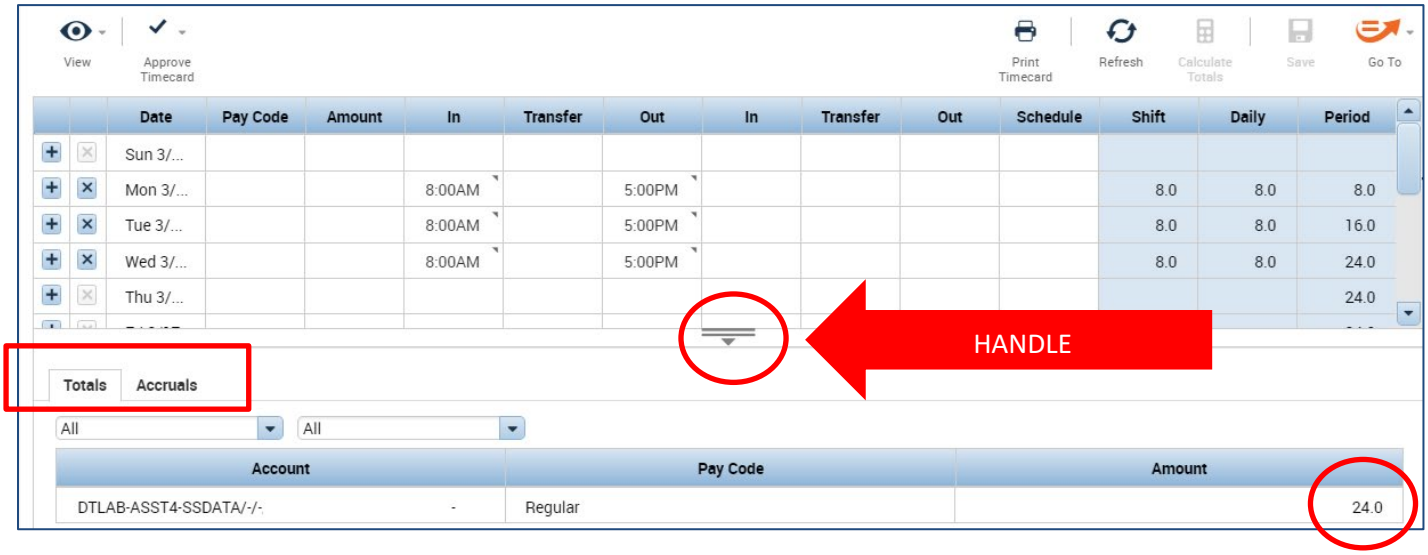
1. Click on Timecards in blue panel on the right of CalTime (a new page will open labeled **Timecards**)



2. Click on Drop down field of names and click on applicable employee. The employee's timecard will open. You can select the pay period at the right of the timecard or select a range of dates by clicking on the calendar icon.

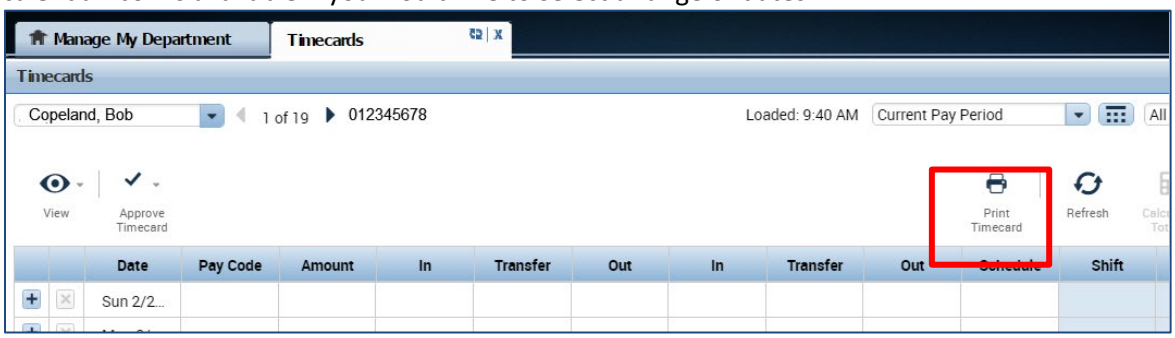


3. To view your employees Timecard Totals and Accruals. Click on the handle that appears at the bottom of the timecard



PRINT A COPY OF YOUR EMPLOYEES TIMECARD

1. On Timecards page, select the period of time you would like to print at the top right of your timecard. A calendar icon is available if you would like to select a range of dates.



2. Click the **Print Timecard** icon. A new page will open with your timecard to print to your local print

Non-exempt, Employee **133133133** **Current Pay Period**

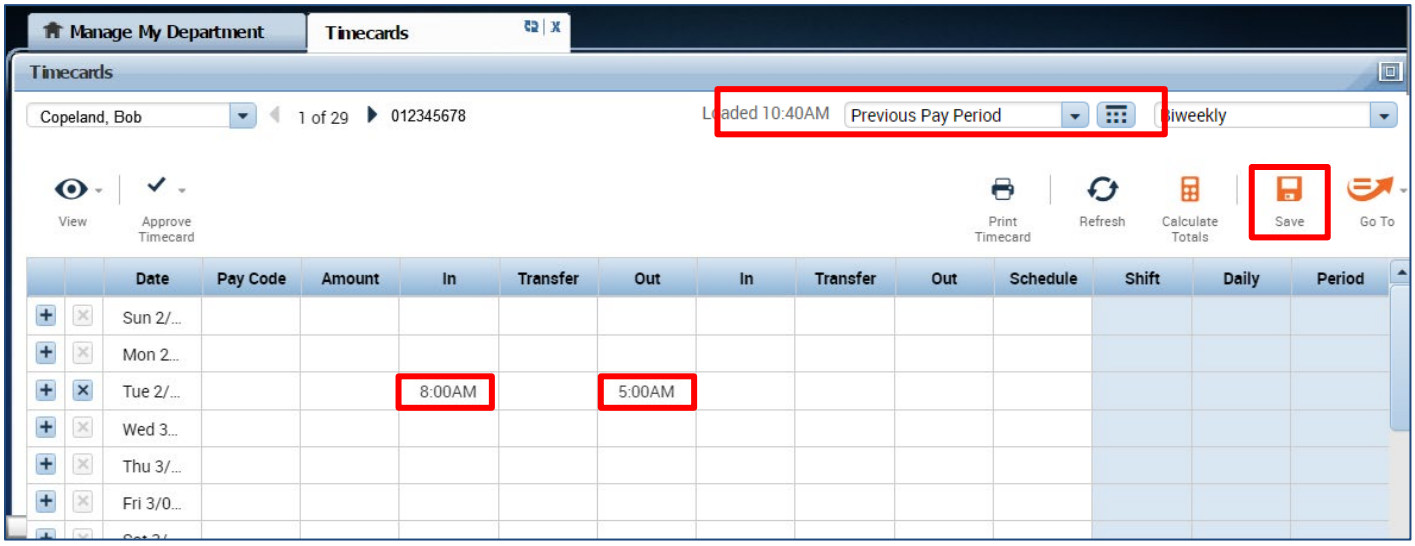
Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily	Period
Sun 2/26												
Mon 2/27			8:00AM		5:00PM					8.0	8.0	8.0
Tue 2/28			8:00AM		5:00PM					8.0	8.0	16.0
Wed 3/01			8:00AM		5:00PM					8.0	8.0	24.0
Thu 3/02			8:00AM		5:00PM					8.0	8.0	32.0
Fri 3/03			8:00AM		5:00PM					8.0	8.0	40.0
Sat 3/04												40.0
Sun 3/05												40.0
Mon 3/06			8:00AM		5:00PM					8.0	8.0	48.0

EMPLOYEE TIMECARD ADJUSTMENTS

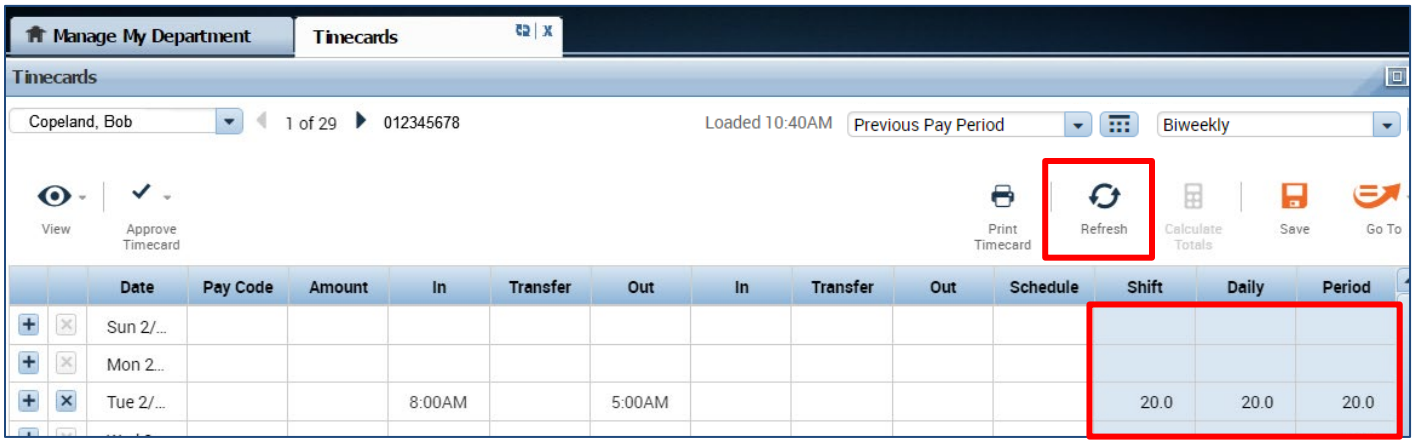
Editing Employees Time

1. Select the correct time period.
2. Select the row for the date you want to add time and enter the start time in the “In” field.
3. Enter the end time for the completion of the shift.
4. Click **Save**.

Note: Please remember to add a or p for AM or PM. Acceptable formats include **8a or 8:30a**.



5. Click **Refresh,** the hours for the Shift and Daily Totals will display.



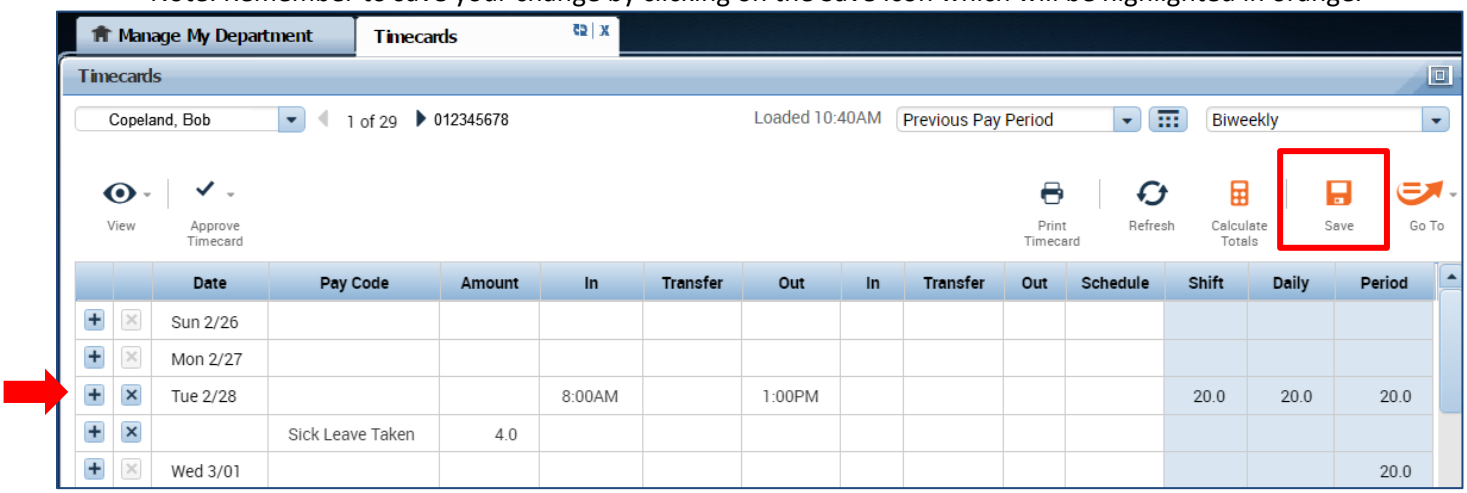
Adding and Removing Timecard Rows for Multiple Entries in a Day

The timecard by default only has one row set up for each day of the pay period with two sets of "In" and "Out" boxes for entry. It may be necessary to add rows to a day to accommodate additional entries. For example, the employee may:

- Work on multiple jobs in one day
- Work a partial day and need to enter partial day leave
- Work on multiple projects in a day that must be tracked
- Clock out for lunch (for a 30-minute lunch rather than the employees normal 60-minute lunch)

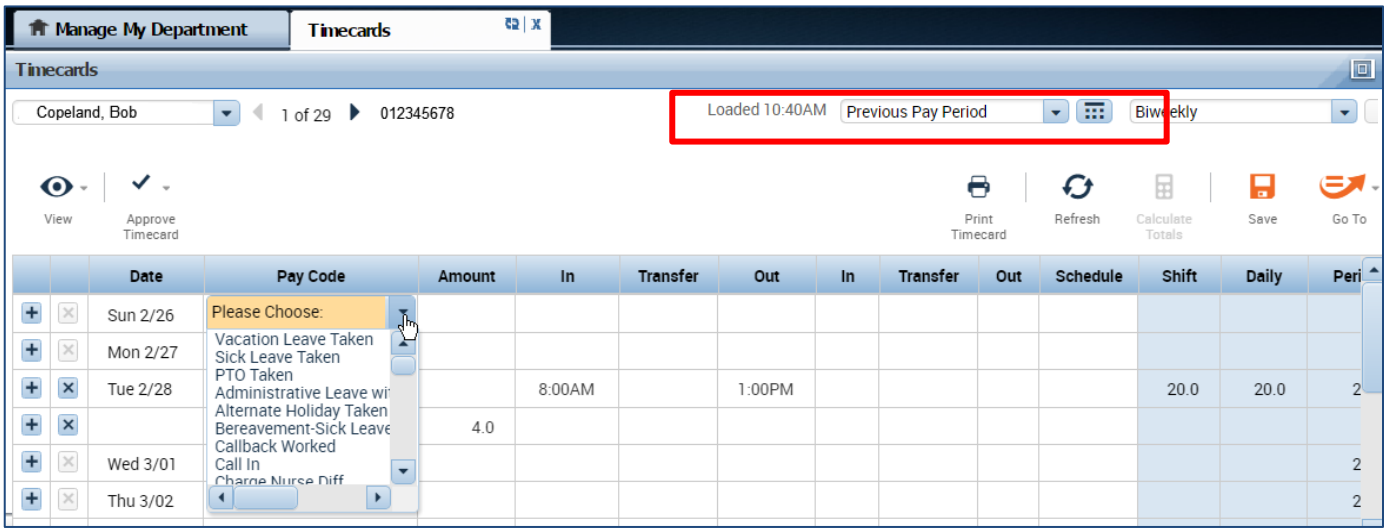
1. **TO ADD A ROW** Click the Plus symbol and this will open a new row for the same day.
   In the Example below, the employee worked 8am-12pm and took an hour for lunch. After lunch they went home sick for the rest of the day. To add the sick time, they added a row to their timecard for that same day and selected the Sick Leave Taken Pay Code and entered 4 hours in the Amount column.
2. **TO REMOVE A ROW** Click the X symbol for the row you wish to delete

Note: Remember to save your change by clicking on the Save Icon which will be highlighted in orange.



Editing Pay Codes and Amounts (i.e. recording leave taken)

1. Access the employees Timecard
2. Ensure that you are in the correct pay period.
3. Click on the Pay Code drop list arrow for the day you wish to enter leave.
   Note: You can expand columns by holding down the left button on your mouse while clicking on the pay code column line to make the column wider
4. From the dropdown list, select the pay code that categorizes the time you worked or leave you wish to report.

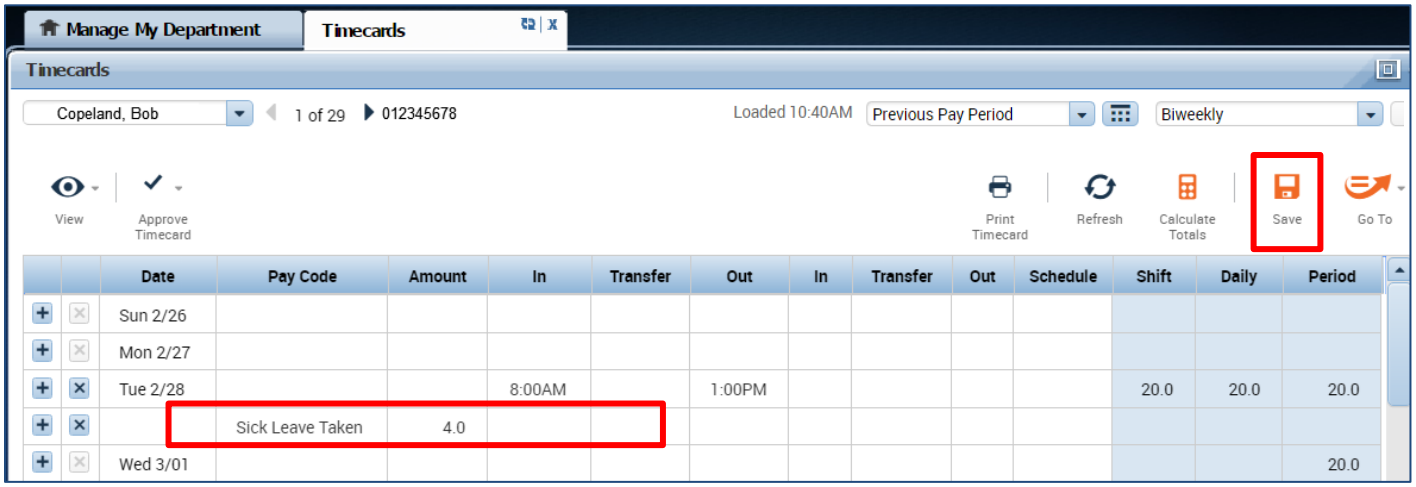


5. Record Hours

Acceptable Formats for Entering Pay Code Amounts

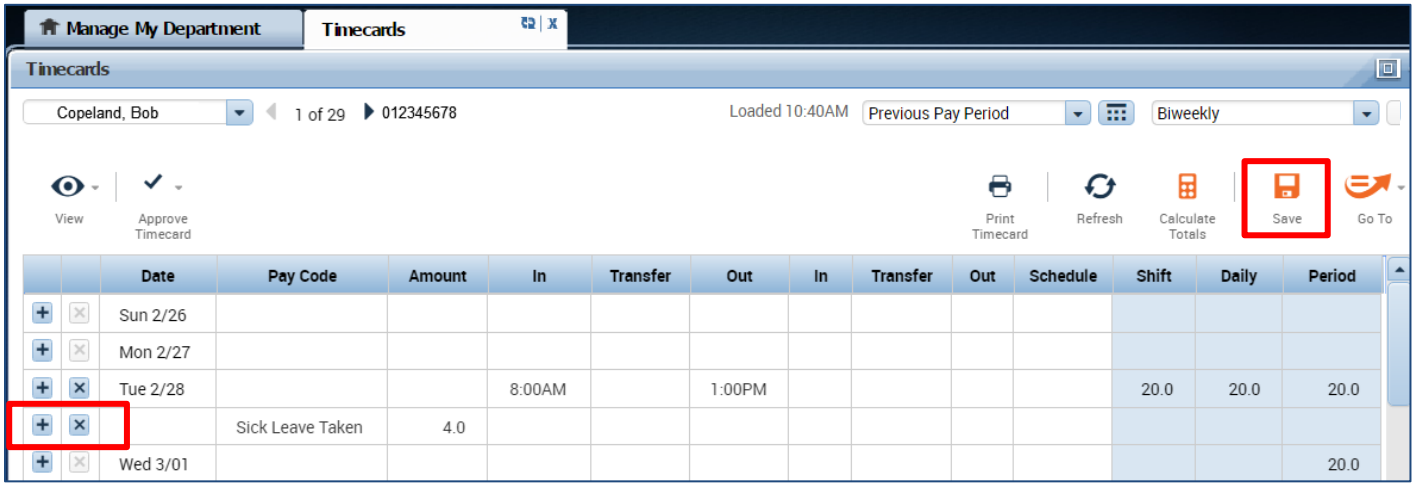
Acceptable Format	Example	Interpretation by CalTime
Leading zeros (optional)	07	7 hours
	08:30 (8 hours, 30 minutes)	8.5 hours
Colon	7:30	7.5 hours
Decimal	8.5	8.5 hours

6. Click Save
   In this example below, the employee entered sick leave. On Tuesday, the employee worked until 1pm and then went hope sick for the rest of the day. To account for the sick leave, the pay code Sick Leave Taken and four hours was recorded.
7. To change the pay code or amount, go to the applicable row on the timecard corresponding to the date you wish to adjust and select a different pay code and enter the correct hours in the Amount column. Click the Save icon highlighted in Orange.



Deleting Pay Codes

1. Go to the Pay row for the applicable day of the week. Click on the **X** icon and the hours for that day will be removed.
2. To edit the amount of hours, simply click on the cell and change the hours. You may also edit the pay code by clicking in the cell under the pay code column and selecting a different pay code.
3. Click the **"Save"** icon at top right of timecard.



Leave Entry for employees on alternative work schedules or Compressed 4/10 Workweeks

Employees with Alternative Work Schedules or Compressed workweeks should enter the number of their daily hours for vacation and full sick days. For example, if you work 10 hours a day for 4 days a week, you would enter 10 hours of leave (vacation, sick, etc.) per day.

Editing a Meal Deduction

Employees do not need to clock in and out for lunch. CalTime is set up to automatically to deduct 30 or 60 minutes for lunch after 5 hours of work. The automatic lunch deduction is based on the employees pay rule assignment. If you wish to change the automatic lunch deduction, you can perform a work rule transfer (temporary change applies to shift for that day only) or a pay rule change for ongoing lunch changes. See instructions in this manual on how to process a work-rule transfer.

Employees are expected to take a lunch as scheduled and to obtain their supervisor's approval before changing their lunch. If the employee skips their lunch, they need to work with their supervisor to ensure that the automatic lunch deduction is cancelled for that day. Likewise, if the employee changes their lunch, they will need you to adjust their timecard to ensure that the proper lunch is noted on the timecard. By law, employees are required to take a lunch of at least 30 minutes after 5 hours of work.

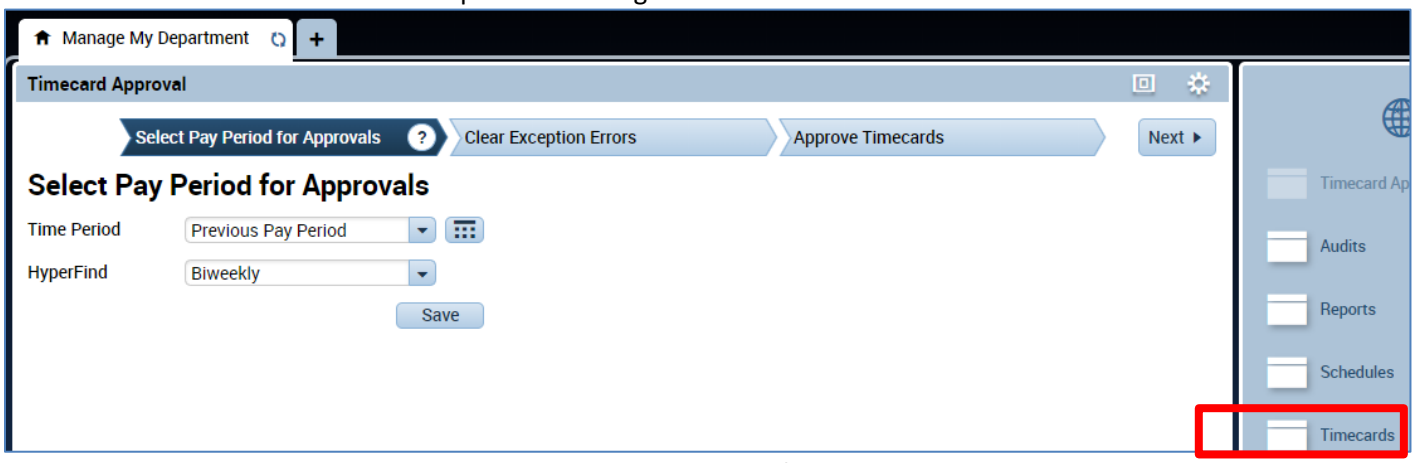
Follow the steps below to process a one-time lunch change corresponding to a specific shift

(For example, changing the employee from a 60 minute lunch to a 30 minute lunch)

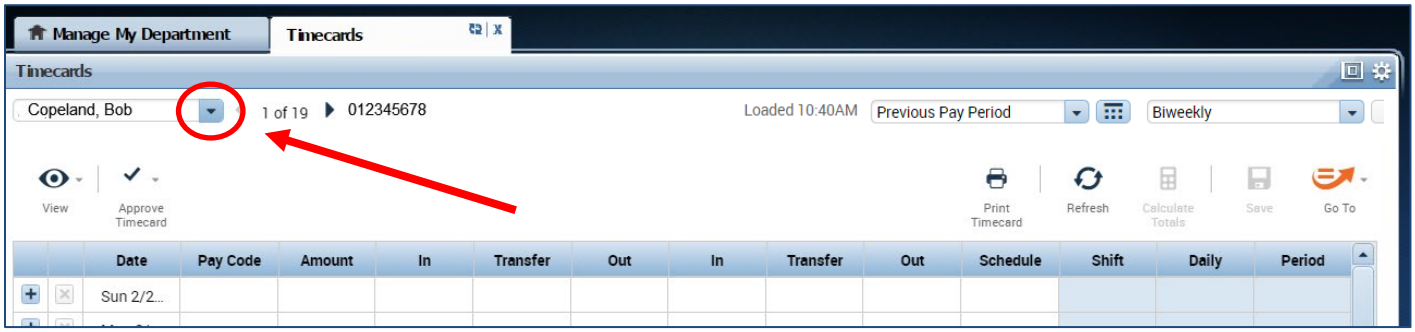
1. First determine your employees pay rule
   Here is an example of how a pay rule appears for an employee
   NX_NonEX_OTP 08 Day 60D

How to view your employees Pay Rule

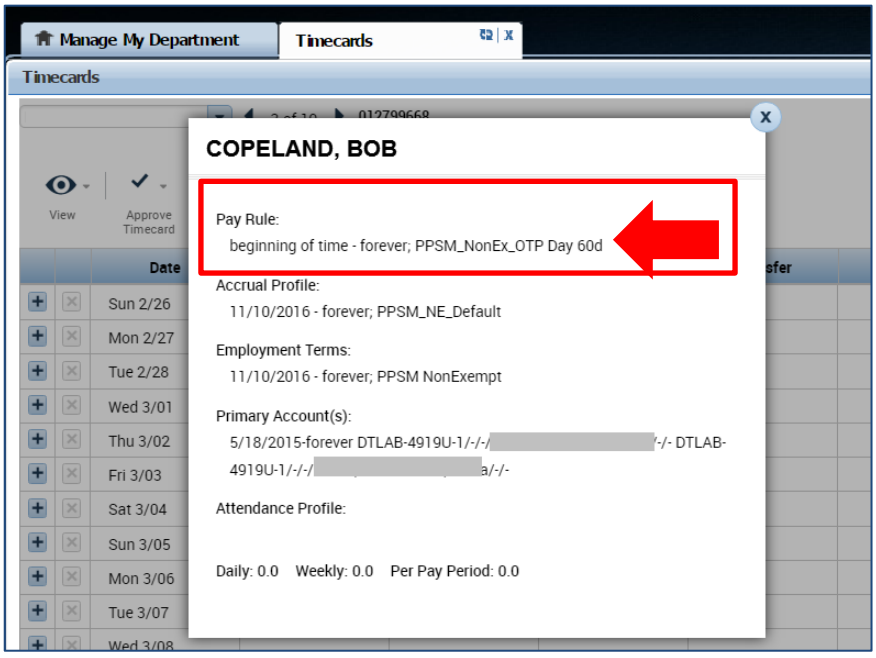
1. Click on Timecards in the blue panel on the right



2. Click the drop down in the employee name tab to search for your employee and click on your employee. After selecting the employee, use your mouse and right click on the name of the employee in the field.



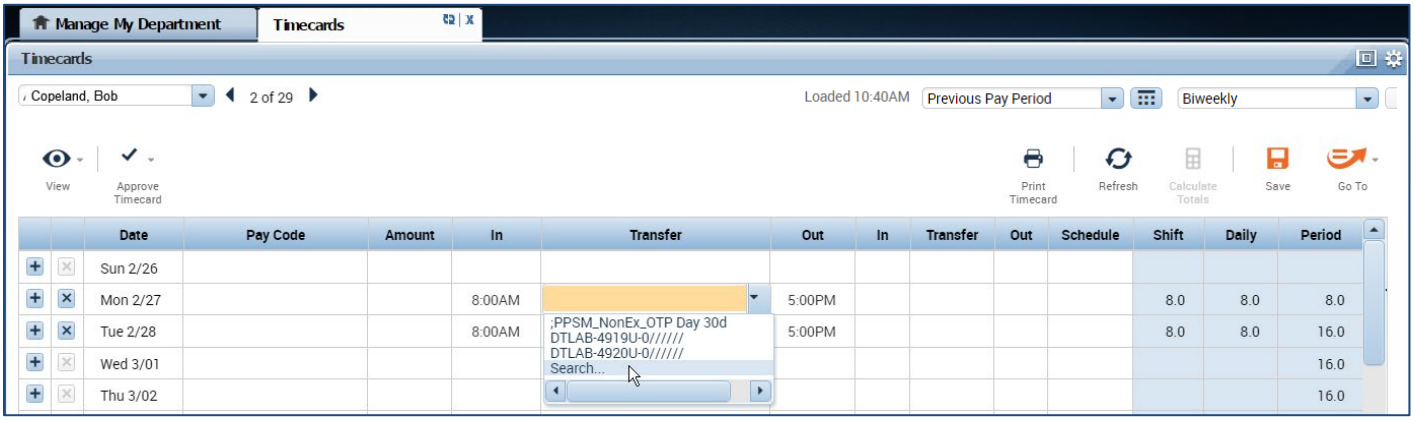
3. A new window will appear, showing detailed information about your employee. The Pay rule information will appear at the top.
   The example screen shot below shows the employee has a pay rule of **PPSM_NonEx_OTP_ Day 60d**
   PPSM (unrepresented) and NonEx (non-exempt) OTP (overtime eligible), and **60d (60 minute lunch)**
   If you want to assign a 30 minute lunch, you will need to process a work rule transfer to
   PPSM_NonEx_OTP_ Day 30d
   PPSM (unrepresented) and NonEx (non-exempt) OTP (overtime eligible), and **30d (30 minute lunch)**



Processing a Work Rule Transfer

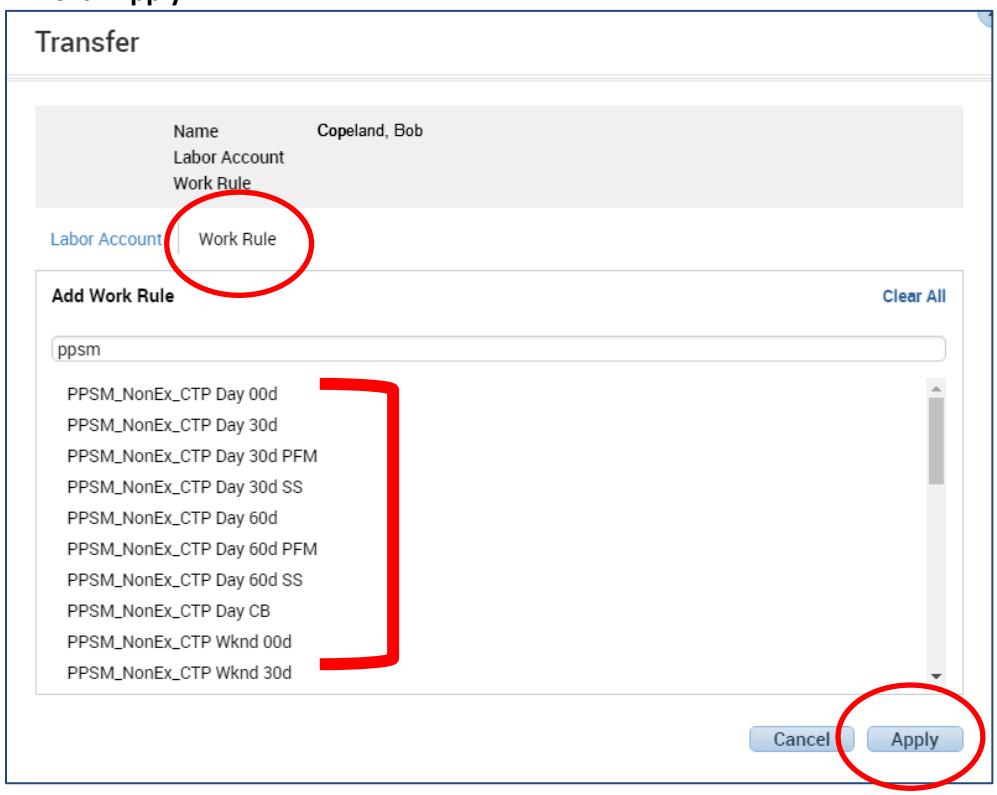
A work rule transfer should be applied when there is a change in an employee's standard work rule for a shift.

1. Click on the in the blank box under Transfer column.
2. A list of available jobs will appear based on jobs you have previously selected. However it is best practice to select search at the bottom of the list and a new Transfer window will appear.



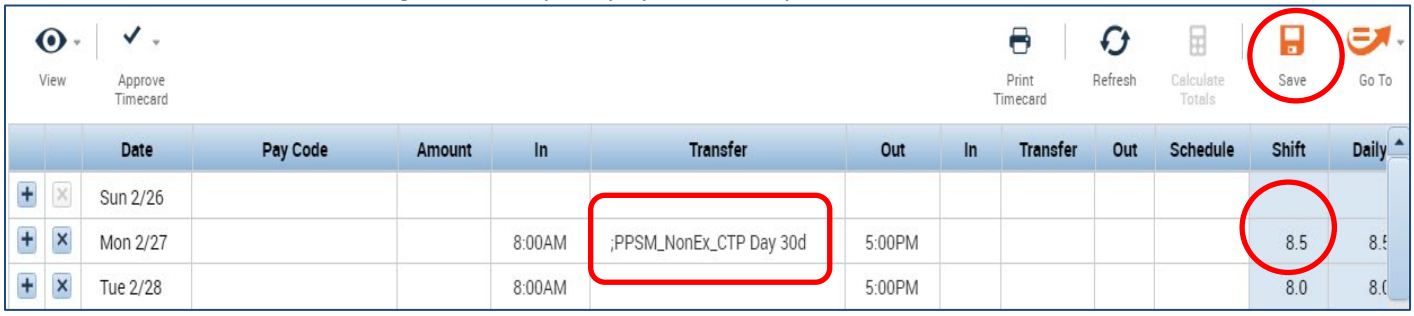
3. Click on **Work Rule**. A complete list of Work rule options available to you will appear. Select applicable work rule.

4. Click **Apply**



5. Once you have clicked apply, the pay rule will populate on the timecard and you can click on calculate totals to see that the employees 60 minute lunch was reduced to 30 minutes and they are now showing 8.5 hours in the work day instead of 8 hours.
6. Then click on the "**Save**" button.

Note: The Save icon will change colors to prompt you to save your edit.



Clearing exceptions (i.e. Missed Punches)

You may have an employee that has forgotten to punch in or out of their shift and as a result the timecard does not know how to calculate the hours. In addition, if your employee has a schedule in CalTime and does not enter time in alignment with that schedule, CalTime will flag an error. Exceptions should be cleared on a daily basis. There are several ways to clear exceptions.

You can clear exceptions in any of the following ways:

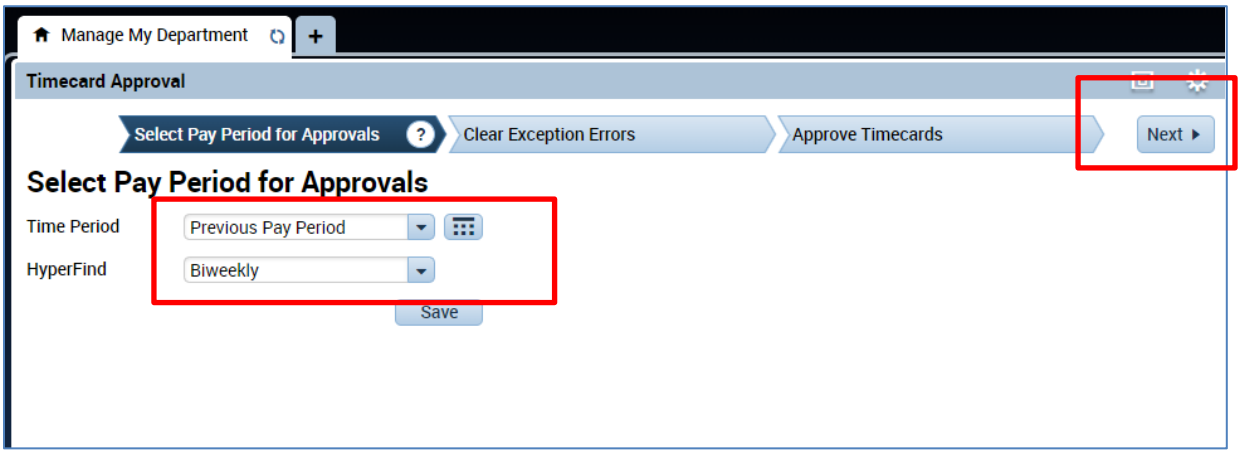
Option 1: Via Manage My Department default review and approval wizard (For Prior Pay Period Errors)

Option 2: Via Exceptions link in the blue panel located at the right

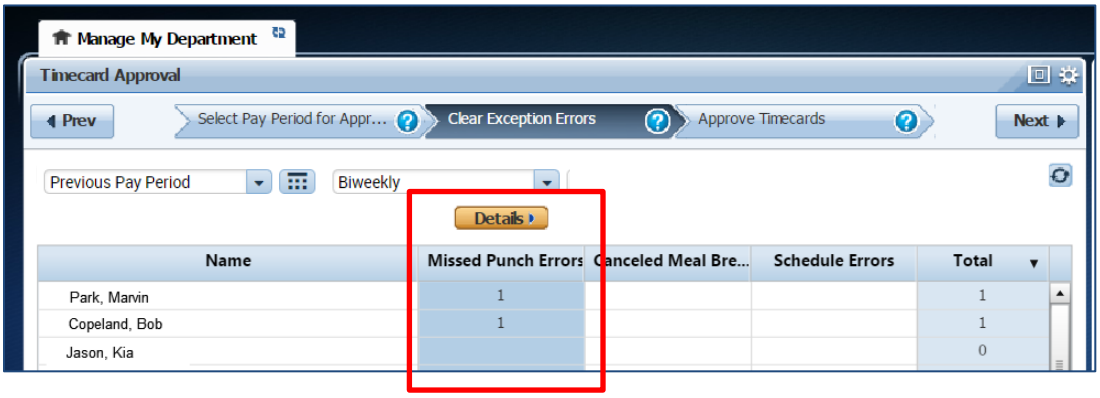
Option 3: Via Exception Alert quick access icon (For current pay period errors only)

Option 1: Via Manage My Department default review and approval wizard

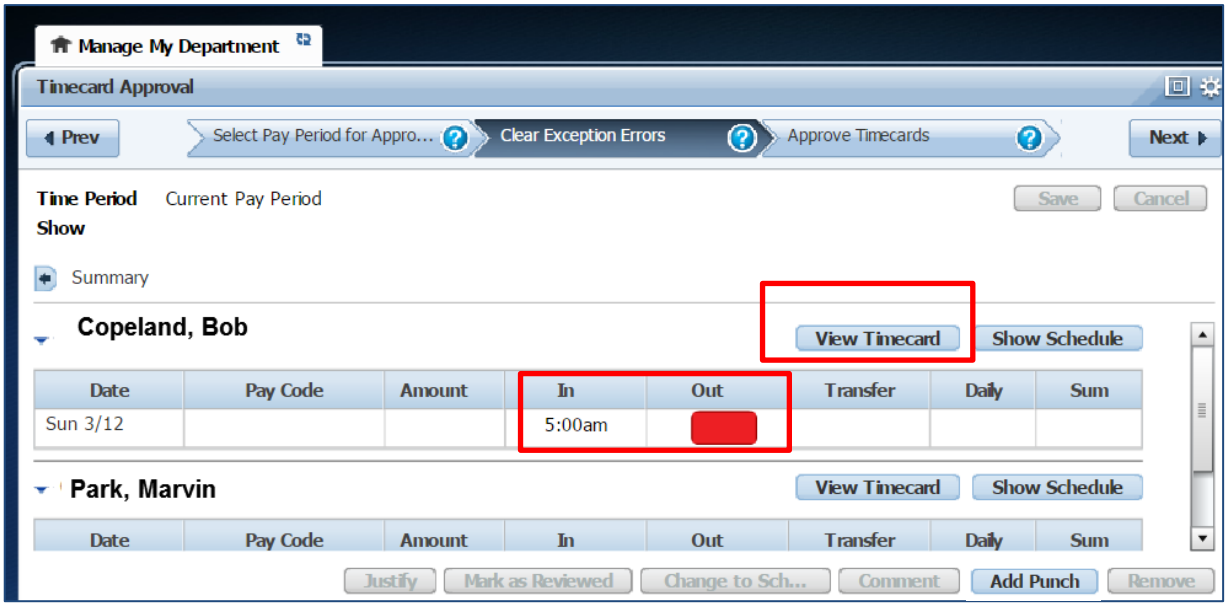
1. Select the applicable Time Period and Hyperfind
2. Click Next



3. A list of employees will appear, the number of errors will appear under Missed Punched Errors, Cancelled Meal Breaks and/or Scheduling errors. You can click on the yellow labeled Details field directly above the exceptions column. A list of timecard errors will appear per employee.

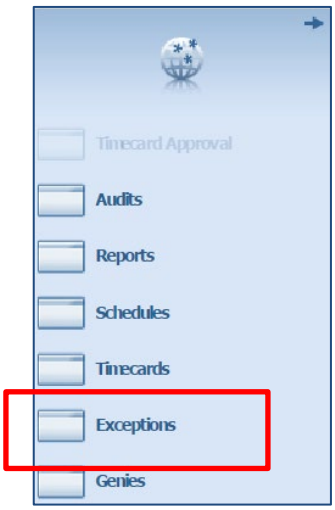


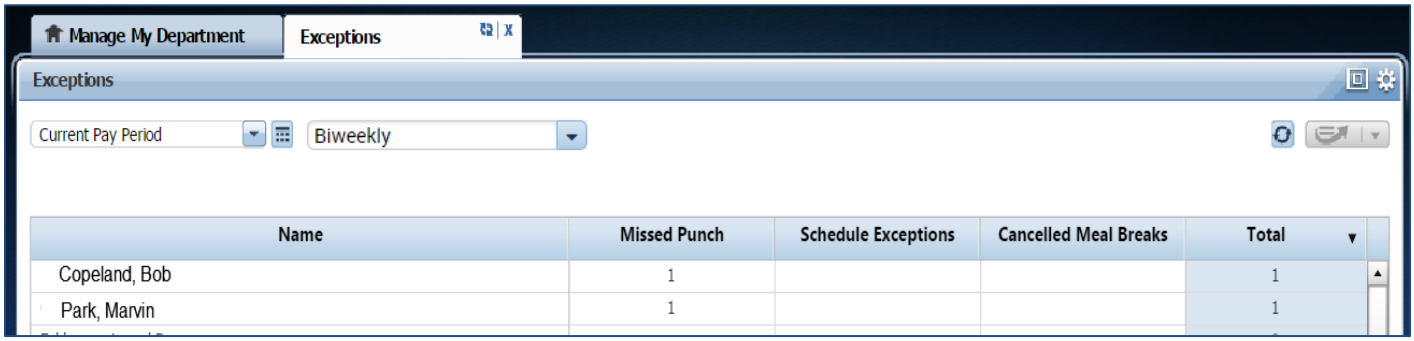
4. The employees missed punch will appear. You simply correct the error here (i.e. enter the missed punch time) or if you would like to look at the employees timecard, you can click on View timecard and correct the error on the employees timecard. If you click on view timecard a new tab will open so that you can navigate between the timecard and the Manage My Department tab.
5. You may click in the red field and insert the correct time. Click Save at the top right. Once you save, the error will be removed from the list.



Option 2: Via Exceptions link in the blue panel located at the right.

Once you click on Exceptions, a new Exceptions window will open. Simply follow the same steps #3-#5 previously described above under Option 1 above.

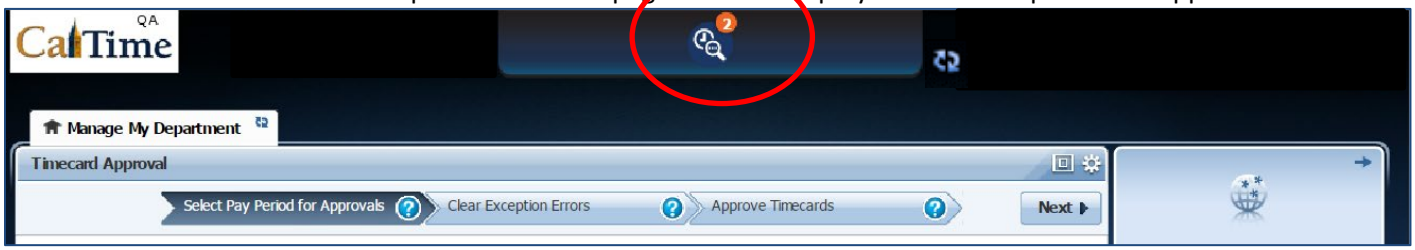




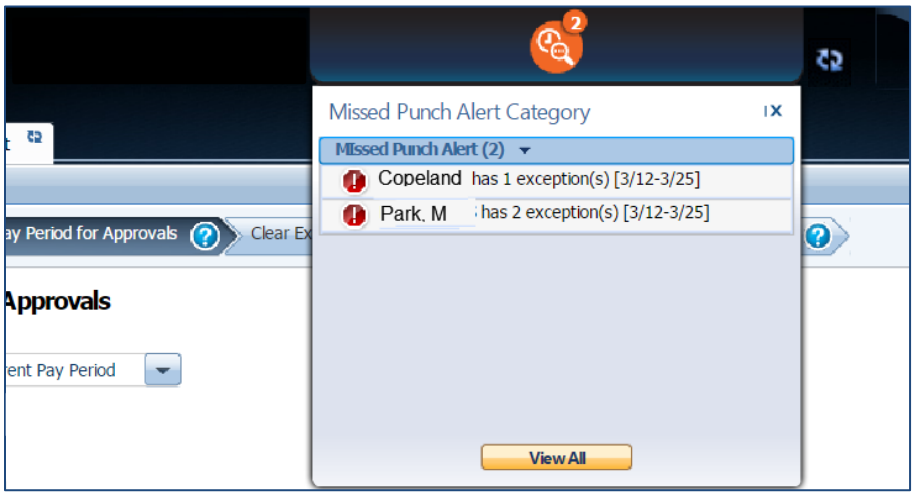
Option 3: Via Exception Alert quick access Icon (for current pay period errors only)

An alert will appear at the top of CalTime with the number of employees that currently have exception errors in CalTime in the current pay period. Click on the Alert Icon.

1. Click on the Alert at the top of the CalTime page. A list of employees with exceptions will appear.



2. Click View All Tab



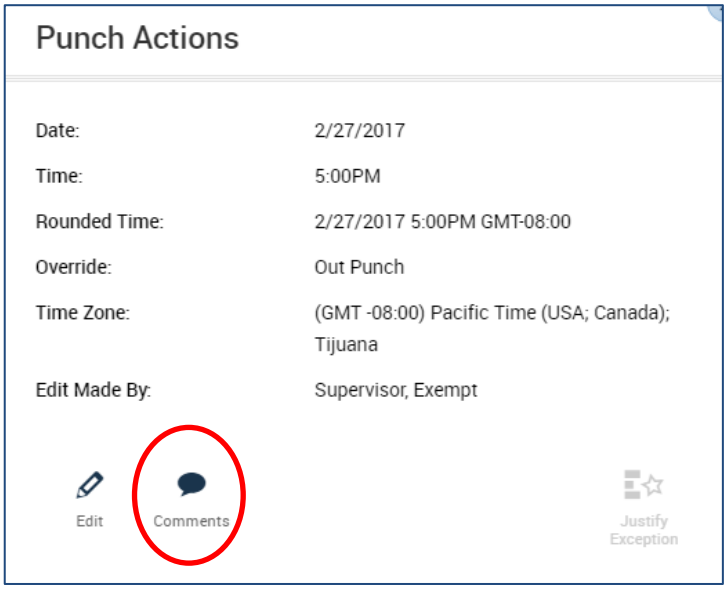
3. An Alerts and Notifications Widget page will open, click on the name of the employee to view the error.

4. Follow steps #4-#5 under Option 1 clearing exceptions previously described above to clear exception error.

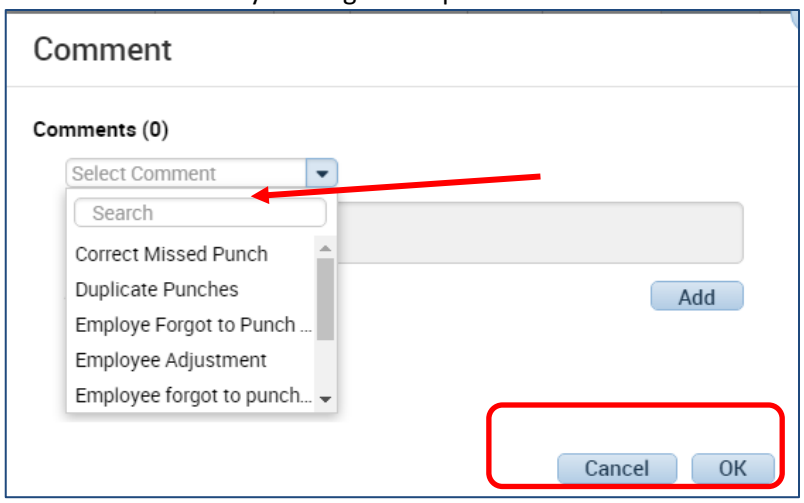
Adding Comments

Supervisors and Timekeepers (not employees) are able to add a comment when editing an employee's timecard.

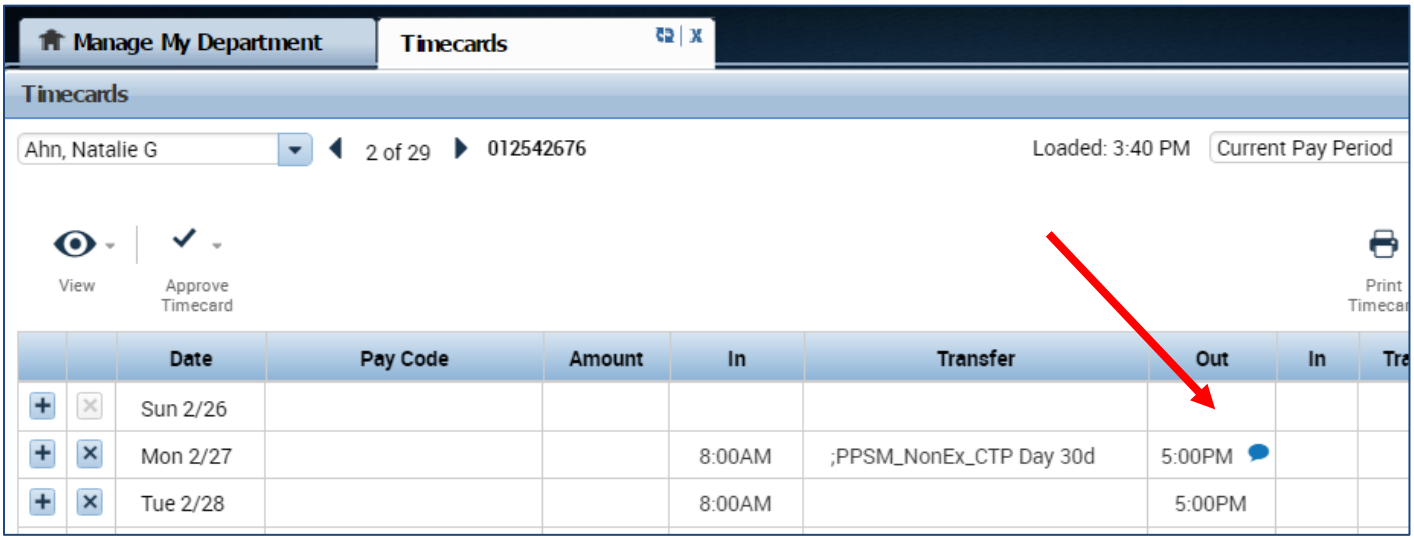
1. Right click on the time field on the employees timecard (a punch actions window will appear)
2. Click on Comments (a comment window will open)



3. Select from drop down list of comments by clicking on drop down field and click Ok.



4. A little comment picture will appear next to the time to convey a comment has been added.



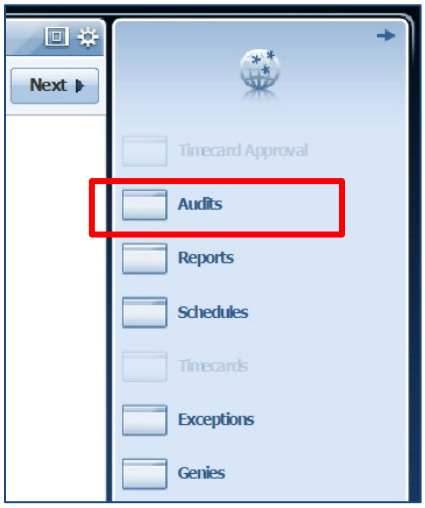
Editing Time for Prior Pay Periods (Historical edits)

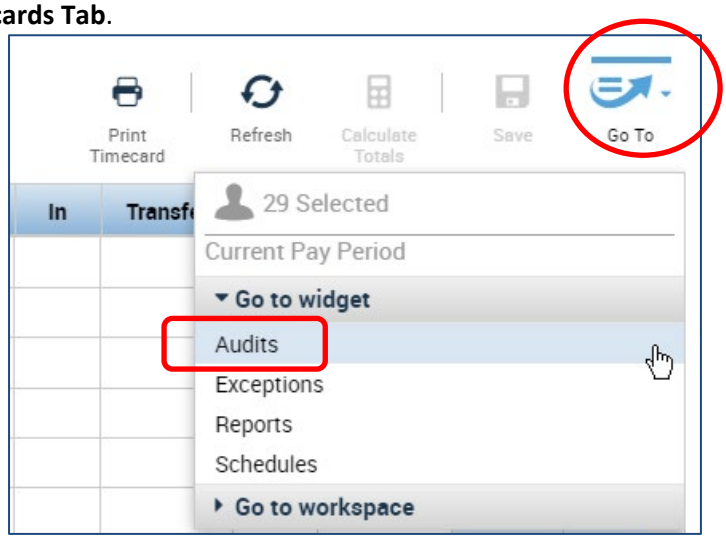
Once a pay period is closed and the timecard has been submitted to payroll for processing (typically the Wednesday following the end of the biweekly pay period), any changes to that timecard would be considered Historical Edits. If you need to add or change entries for prior pay periods, you will need to contact your timekeeper (i.e. Berkeley Regional Services). The supervisor must work with a timekeeper to make the necessary corrections. Only timekeepers have access to edit prior pay periods. Historical edits may adjust your pay or leave balances, depending on the type of correction. Here are examples of when historical edits are necessary:

- Leave that was not recorded or recorded in error
- Time entry that required a work rule transfer (by the supervisor) to properly account for overtime, shift differential, etc.
- Missed time entry or incorrect hours
- Time entry assigned to the wrong job (for employees with multiple jobs
-

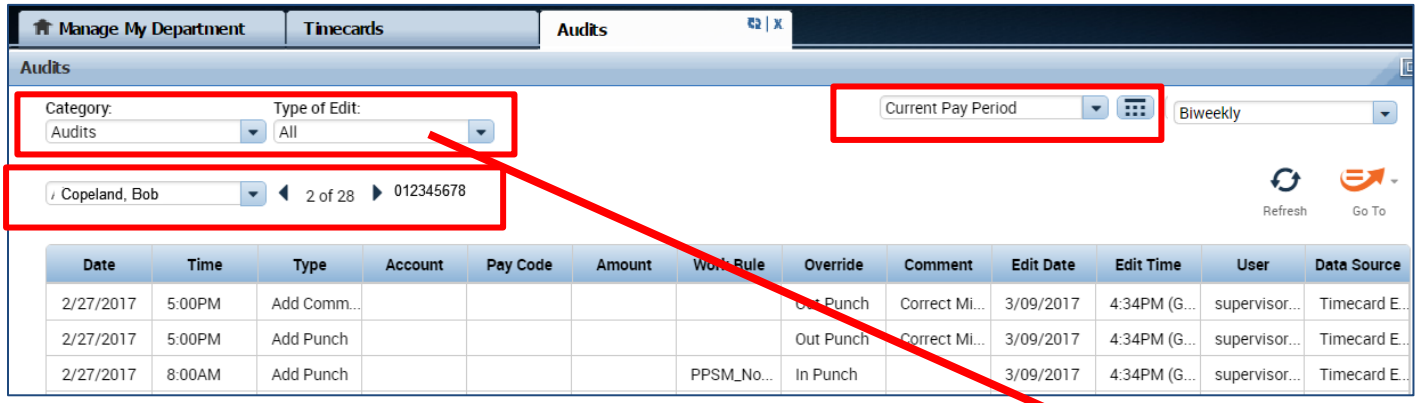
AUDITS

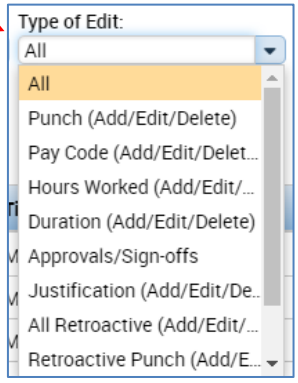
From the **Manage My Department Tab,** to the right is a blue panel, if you click on **Audits**, you will be taken to a screen to view any adjustments to an employee's timecard for a specified pay period(s). Note you can also select audits from the **Go To icon** available on the **Timecards Tab**.





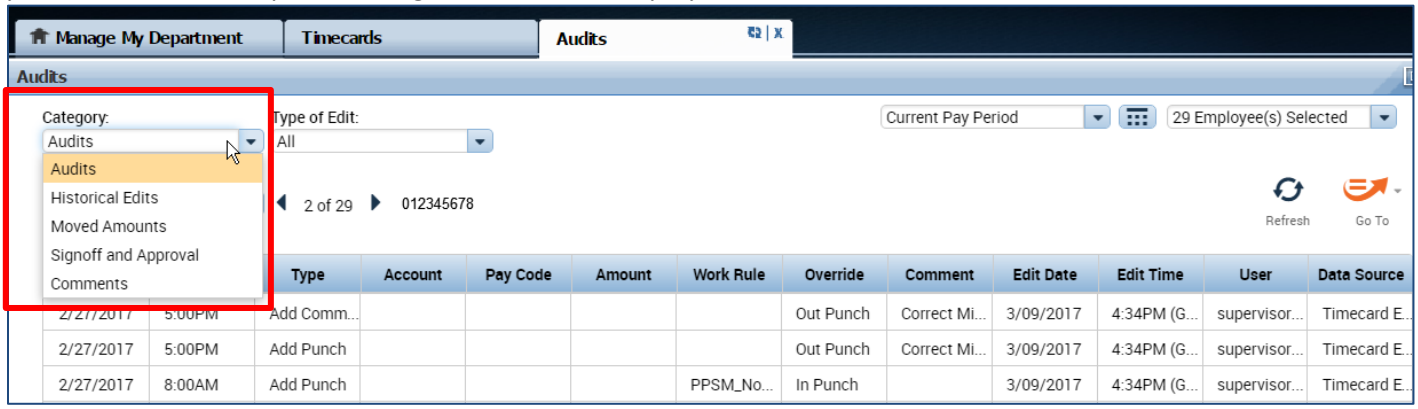
The screen will default to the current pay period and a list of any edits made to the employees timecard. You can select different employees by clicking on the employees name field or scroll through employees by clicking on the forward or backwards arrow displayed below.





Note: If you hover your mouse over any of the fields, you will see the full field displayed.
Date: Associated Timecard Date
Time: The time you started or ended your shift
Type: The type of edit that was made
Account: If a special job or friendly name was used
Pay code: The type of pay code used to categorize leave taken
Amount: Amount of hours associated with the Pay code used for leave taken
Work Rule: Will notate a work rule transfer
Override: This field indicates that the time was an in punch or and out punch
Comment: Comments can be inserted by timekeepers or supervisors only
Edit Date: This is the date the timecard was edited
User: This field indicates who made the edit to the timecard
Data Source: Timecard Editor

You also have the ability to click the drop down arrow under **Type of Edit**. This will open up a list of types of edits if you are interested in only looking at the audit trail for Pay Codes, punches, etc.
The **Category Field** drop down list shows Historical Edits, Moved Amounts, Sign-off and Approvals and Comments if you want to filter for specific changes made to the employees timecard.

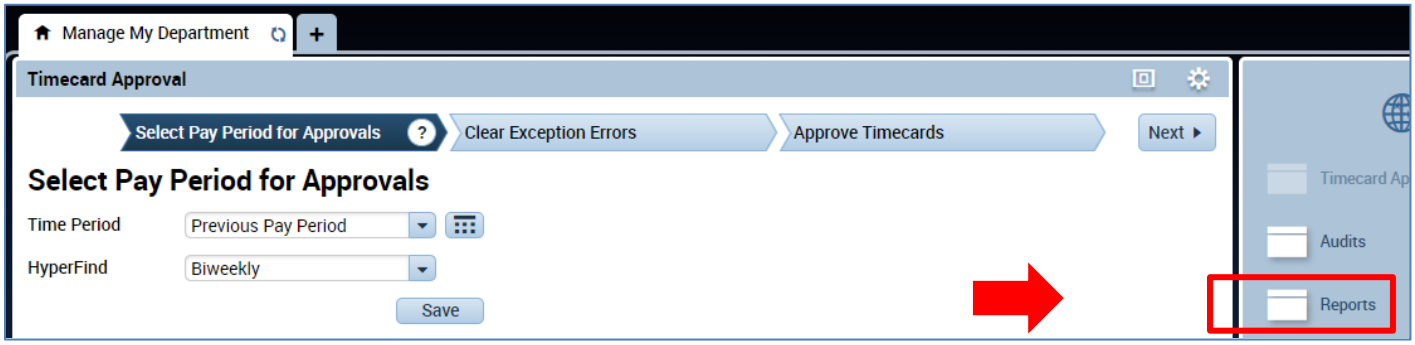


REPORTS

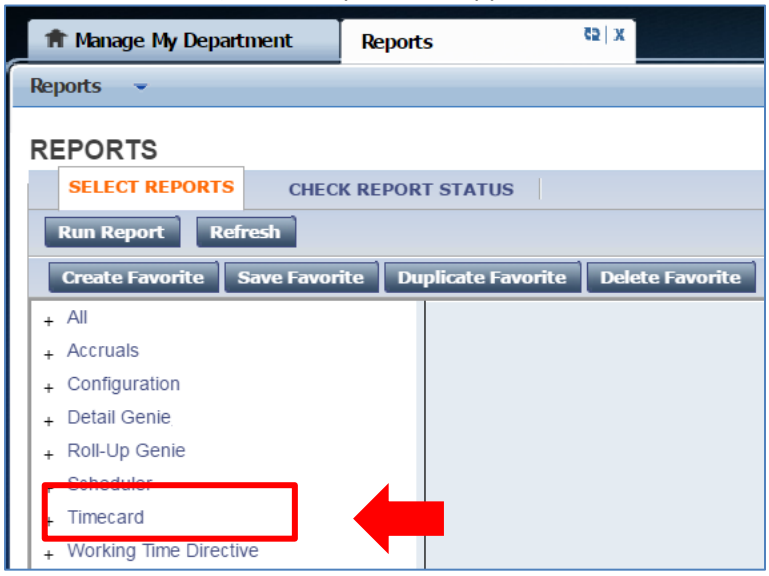
Time Detail Report

The Time Detail Report shows the time and leave entered into the employee's timecard for a specified period of time. In addition, the report will show totals for overtime, comp time, shift differential, etc. Employees may consider producing the time detail report if they would like a summary of hours for the more than one biweekly pay period (i.e. the last three biweekly pay periods, three months).

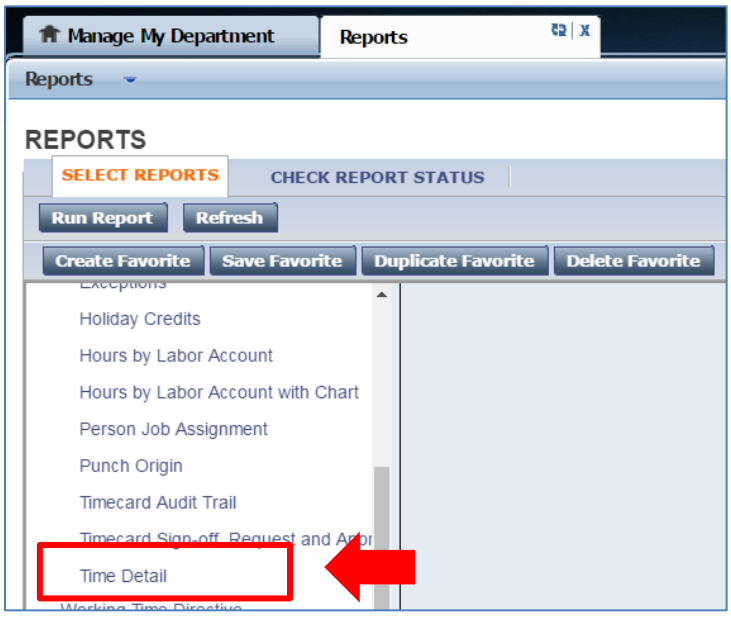
1. Click on **Reports** (located on the right of your timecard in blue tool bar)



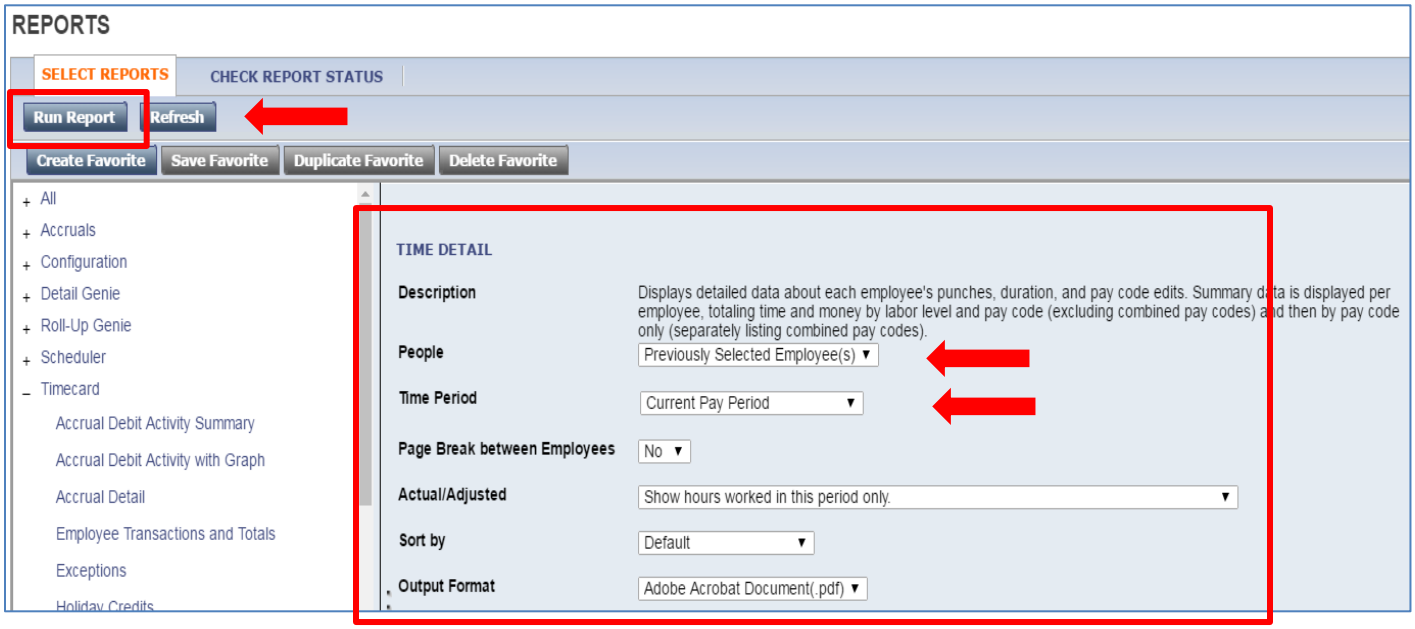
2. Click on **Timecard** (a list of reports will appear)



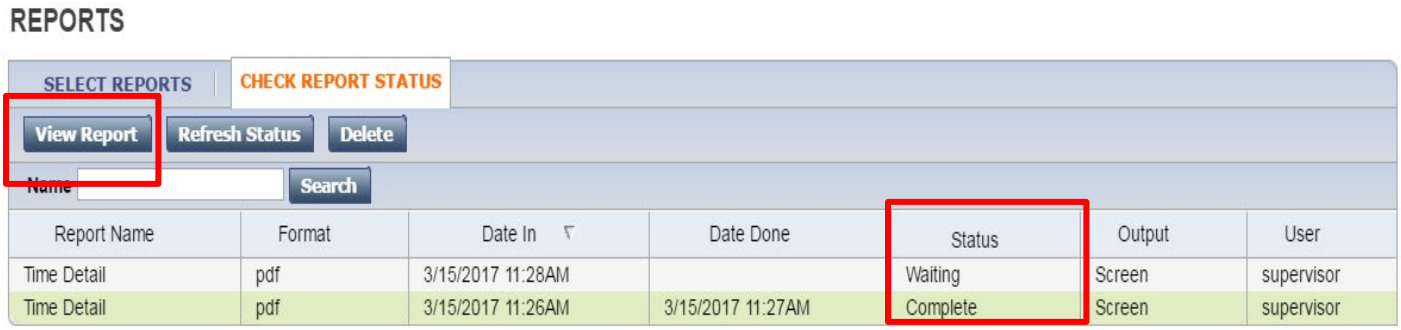
3. Click on **Time Detail**



4. The **People** field, has a list of options such as Previously Selected Employees (click drop down for additional options).
5. Select **Time Period** by clicking on the drop down arrow. You have several options including selecting a range of dates.
6. Click on **Run Report.** A new screen will open.



7. The report Status Column will show as waiting. When the Status changes to Complete, you may click on View Report.



8. The report will open as a PDF and is displayed on the following page.

Time Detail

Time Period:	Current Pay Period	Data Up to Date:	3/15/2017 11:27:15 AM
Query:	Previously Selected Employee(s)	Executed on:	3/15/2017 11:26AM GMT-07:00
Actual/Adjusted:	Show hours worked in this period only.	Printed for:	supervisor
		Insert Page Break After Each Employee:	No

Employee: Copeland, Bob ID: 012345678 Time Zone: Pacific

Status: Active Status Date: 7/20/2015 Pay Rule: PPSM_NonEx_OTP Day 60d

Primary Account	Start	End
DTLAB-ASST4-SSDATA/-/-/0	8/28/2016	Forever

Date/Time	Apply To	In Punch	In Exc	Out Punch	Out Exc	Override Amount	Adj/Ent Amount	Money Amount	Day Amount	Totaled Amount	Cum. Tot. Amount
Xfr/Move: Account		*Comment*		*Xfr: Work Rule*							
3/13/2017		8:00:00 AM		5:00:00 PM						8.00	8.00
3/14/2017		8:00:00 AM		5:00:00 PM						8.00	16.00
3/15/2017		8:00:00 AM		5:00:00 PM						8.00	24.00

Labor Account Summary	Pay Code	Hours	Money	Days
DTLAB-ASST4-SSDATA/				
	C-Holiday Lookback	24.00		
	C-Total Hours	24.00		
	Regular	24.00		

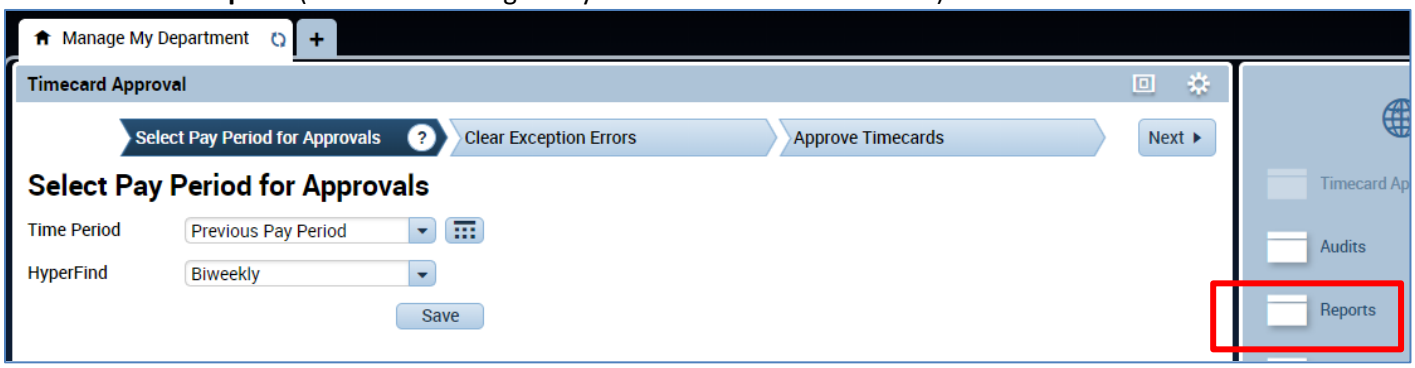
Combined Pay Code Summary	Pay Code	Hours	Money	Days
	C-Holiday Lookback	24.00		
	C-Total Hours	24.00		
Totals:		48.00	$0.00	0.00

Pay Code Summary	Pay Code	Hours	Money	Days
	Regular	24.00		
Totals:		24.00	$0.00	0.00

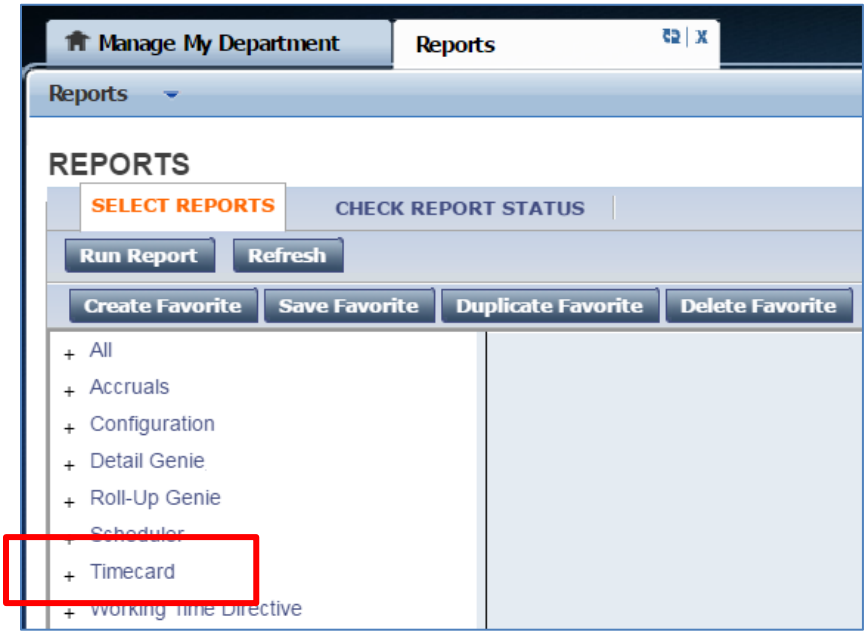
Accrual Balance Report

The Accrual Balance Report shows your leave accrued, leave taken, and beginning and ending leave balances for a specified period of time. Employees may consider producing the Accrual Balance report if they would like a summary of leave adjustments for more than one biweekly pay period (i.e. the last three biweekly pay periods, three months).

1. Click on **Reports** (located on the right of your timecard in blue tool bar)

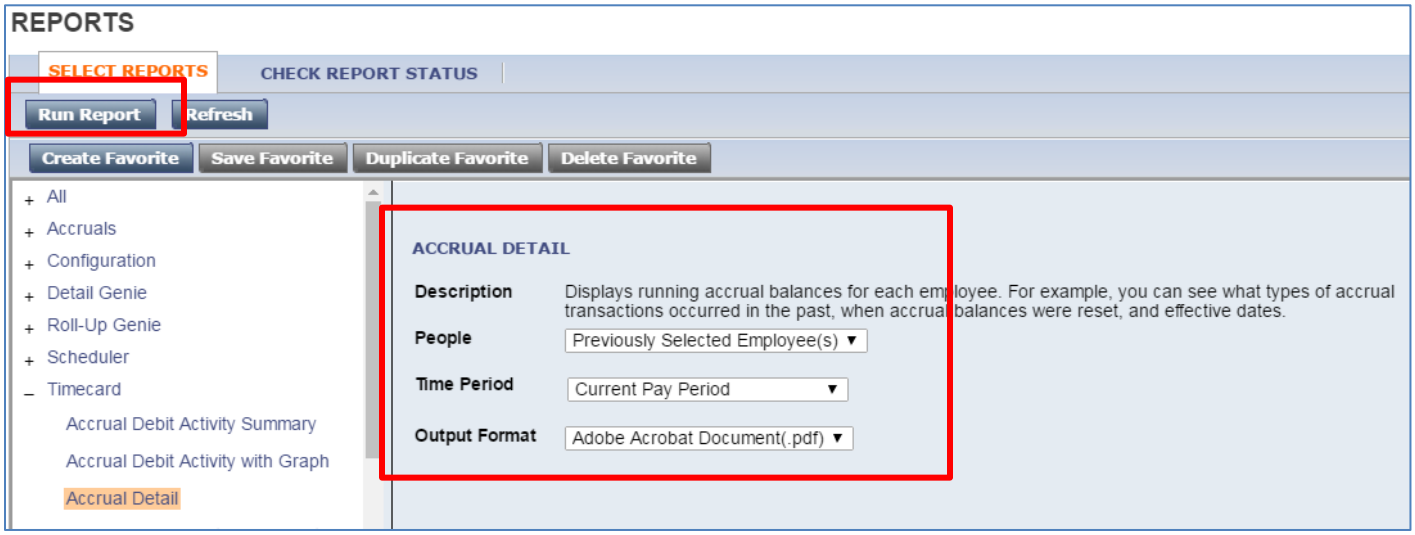


2. Click on Timecard (a list of reports will appear)

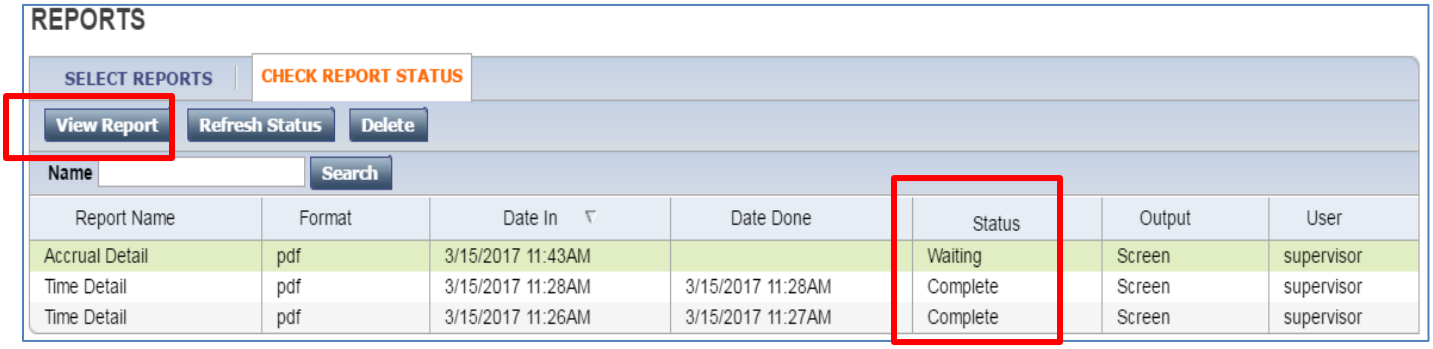


3. Click on Accrual Detail

4. The People field, has a list of options such as Previously Selected Employees (click drop down for additional options).
5. Select Time Period by clicking on the drop down arrow. You have several options including selecting a range of dates.
6. Click on Run Report



7. The report Status Column will show as waiting. When the Status changes to Complete, you may click on View Report. See example of report below.



Accrual Detail

Data Up to Date: 3/15/2017 11:43:48 AM
Executed on: 3/15/2017 11:43AM GMT-07:00
Printed for: supervisor

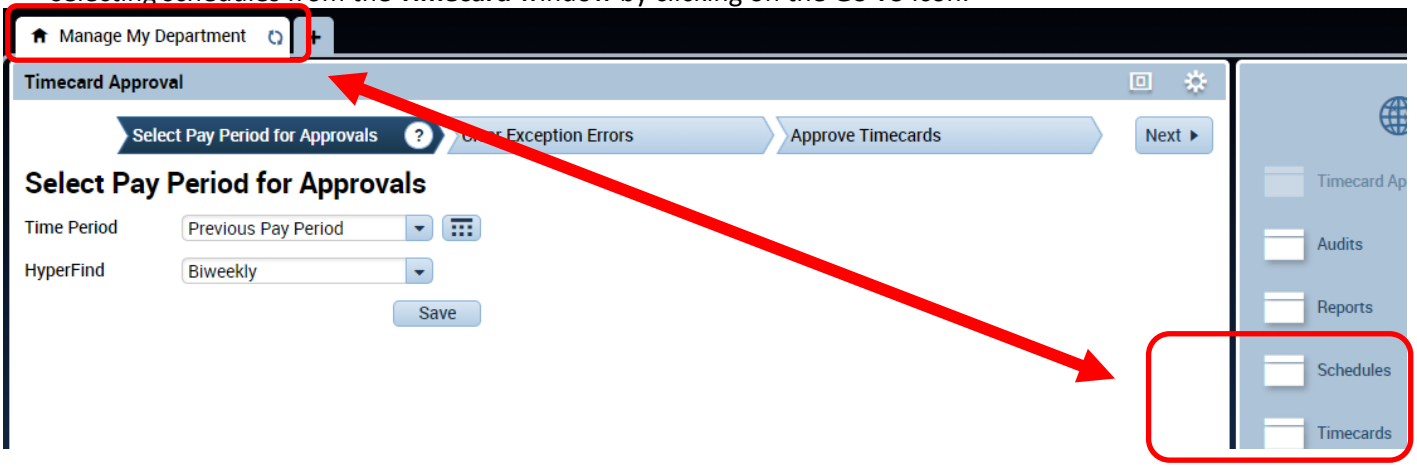
Time Period: Current Pay Period
Query: Previously Selected Employee(s)

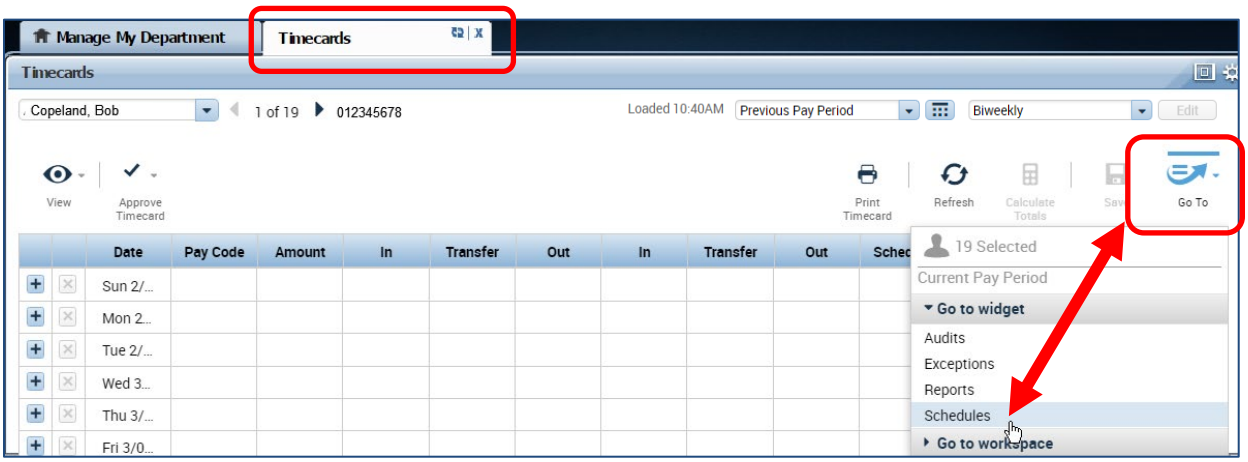
Accrual Code / Effective Date	Action	Amount		Running Balance	Pay Code	Source	Edit Date	Edited By
Copeland, Bob			ID: 012345678					
Comp Time (Hours)								
Sat 3/11/2017			Balance Forward	0.00				
	Total Debits:	0.00	Total Credits:	0.00				
Sick Accrual (Hours)								
Sat 3/11/2017			Balance Forward	0.00				
	Total Debits:	0.00	Total Credits:	0.00				
Sick Leave (Hours)								
Sat 3/11/2017			Balance Forward	0.00				
	Total Debits:	0.00	Total Credits:	0.00				
Vacation (Hours)								
Sat 3/11/2017			Balance Forward	0.00				
	Total Debits:	0.00	Total Credits:	0.00				
Vacation Accrual (Hours)								
Sat 3/11/2017			Balance Forward	0.00				
	Total Debits:	0.00	Total Credits:	0.00				
Vacation Lost Accruals (Hours)								
Sat 3/11/2017			Balance Forward	0.00				
	Total Debits:	0.00	Total Credits:	0.00				
Vacation Maximum (Hours)								
Sat 3/11/2017			Balance Forward	0.00				
	Total Debits:	0.00	Total Credits:	0.00				
Ahn, Natalie G			ID: 012542676					
Comp Time (Hours)								
Sat 3/11/2017			Balance Forward	0.00				
	Total Debits:	0.00	Total Credits:	0.00				

SCHEDULES

Employees are not required to have schedules however some departments have decided to assign schedules to their employees. Please be aware that if the employee does not record time according to their assigned schedule then CalTIme will flag an error on the timecard which must be corrected by the employee's supervisor.

1. You can access schedules in two ways. From the **Manage My Department** main menu, click on the **Schedules** link located in the blue panel located to the right of the CalTime webpage. You also have the option of selecting schedules from the **Timecard** window by clicking on the **Go To** Icon.





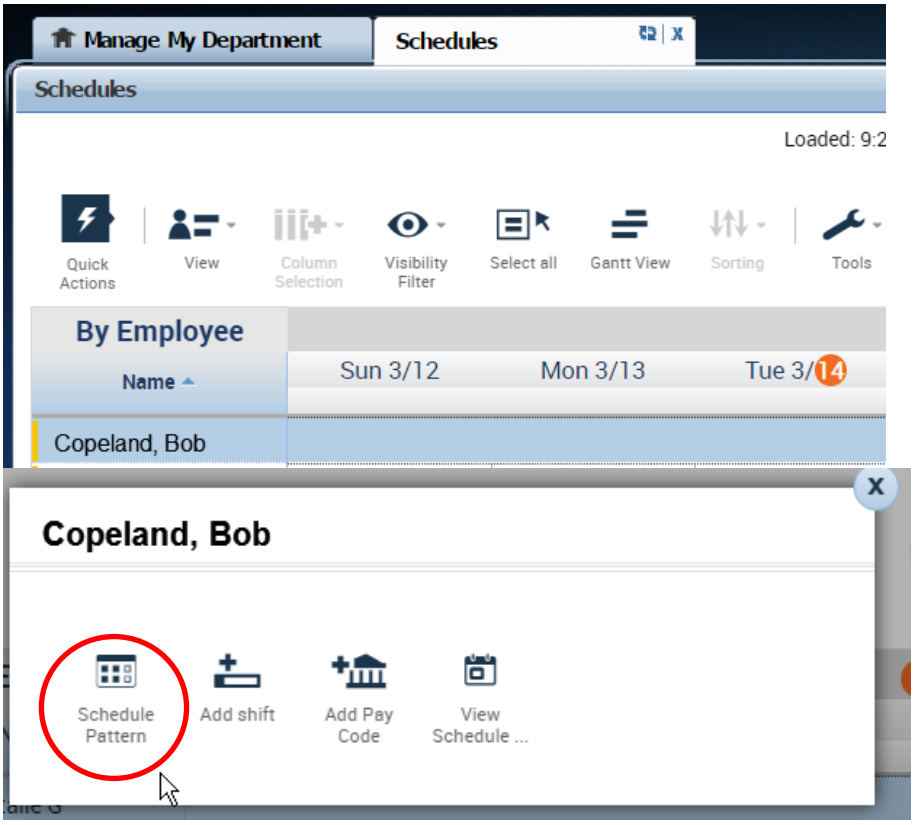
2. A **Schedules** tab will open for all your employees. You have the option of setting up a schedule for one employee by clicking on the employees name or you can hold down the Ctrl button on your keyboard and click on multiple names at once (this will highlight all the names selected).
3. Make sure you are looking at the correct period of time you would like to assign a schedule for.

Adding a Schedule from a pre-defined shift (Recommended)

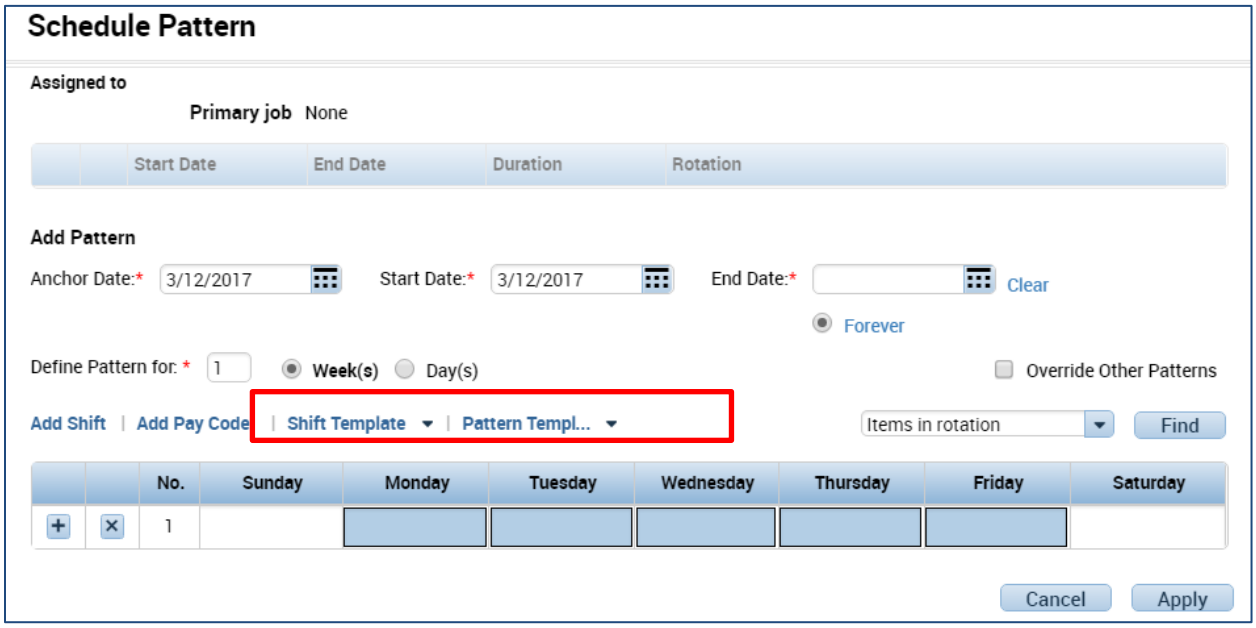
There are several ways to add a schedule. Available for your selection are:

Shift templates: list of available start and stop shifts to choose from (i.e. 8a-5p, 9a-6p).
Shift patterns which is a list of available start and stop shifts and days of the week to select from (7a-4p, Mon thru Fri, 9a-6p Tues –Sat)

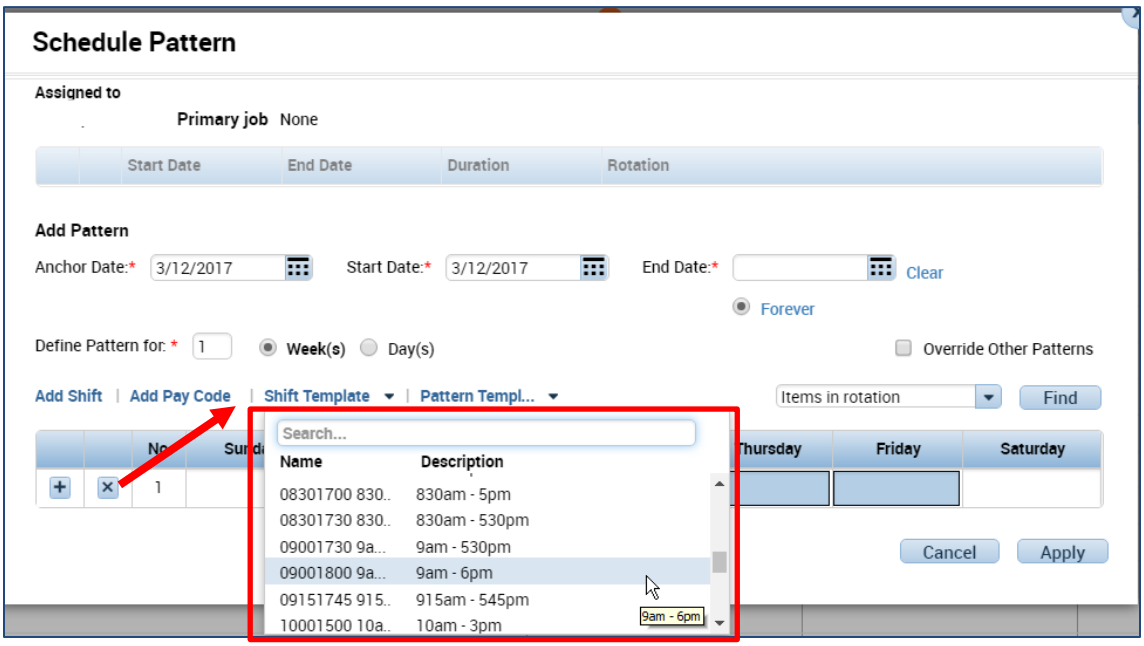
1. Use your mouse and right click on the employees name and click on Schedule template (a Schedule Pattern window will appear)



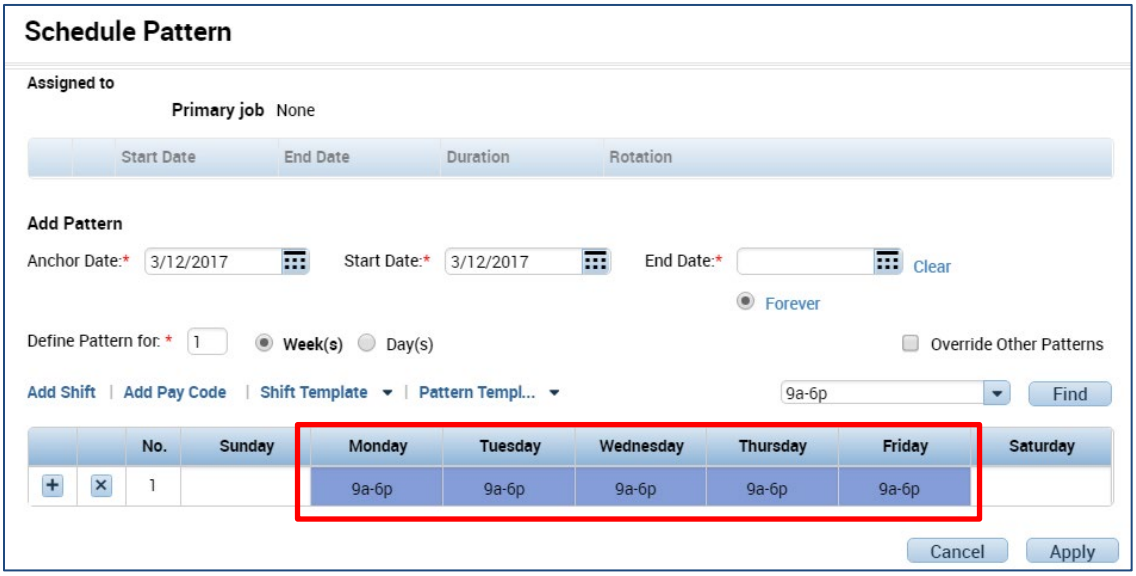
2. Click on the applicable days while holding the Ctrl button on your keyboard and click on Shift Template (Note: if you click Pattern templates instead of Shift Template, then you do not need to perform this step of selecting days because a shift pattern will automatically have the days of the week)



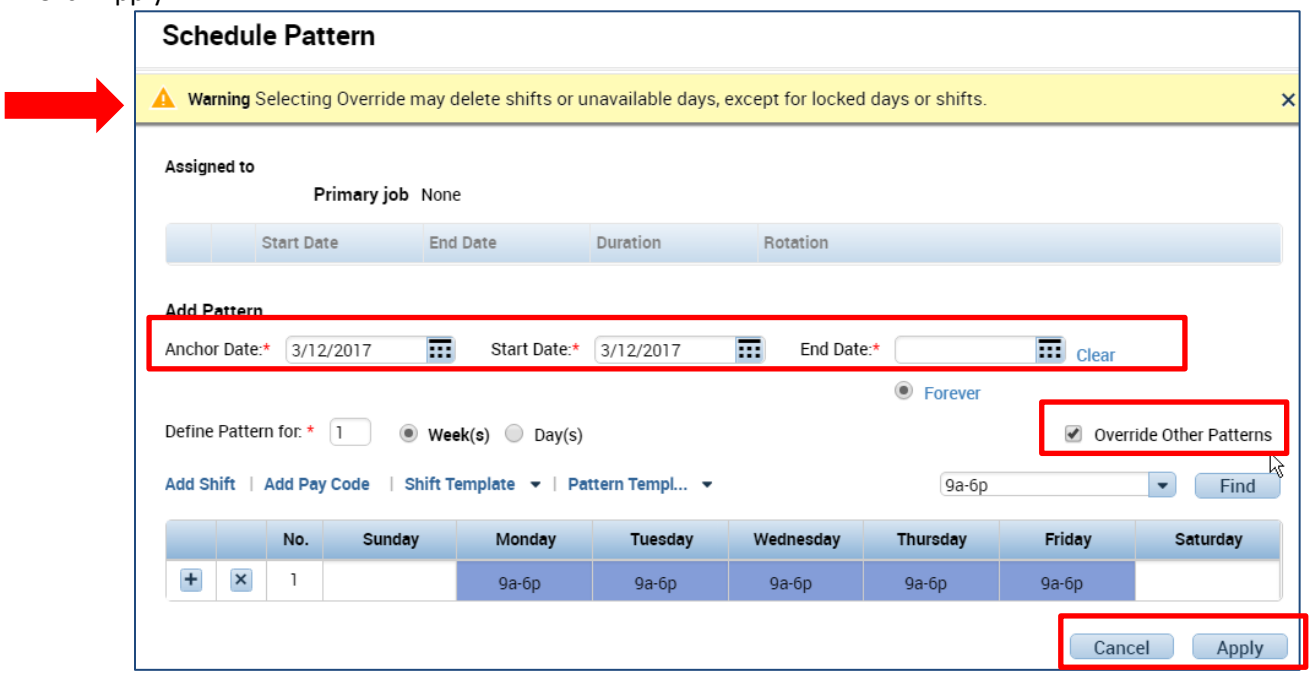
3. Select pre-defined shift from list of shifts



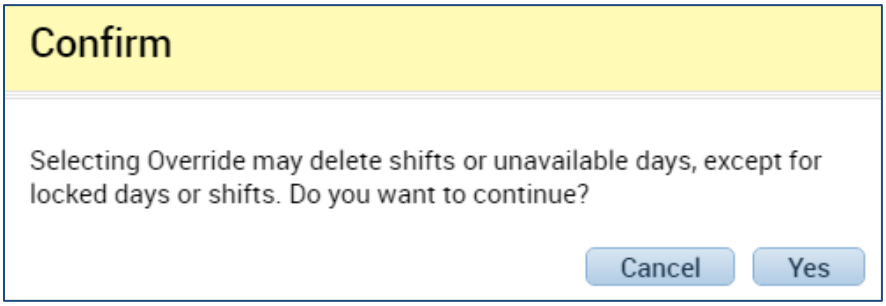
4. The schedule will populate (Note: schedule patterns can span several weeks. For example, an employee may work Monday-Friday 8a-5p every other week and Monday-Friday 9a-6p every alternating week. To schedule this, simply add a row by using the Plus sign icon on the day of the week row shows below).



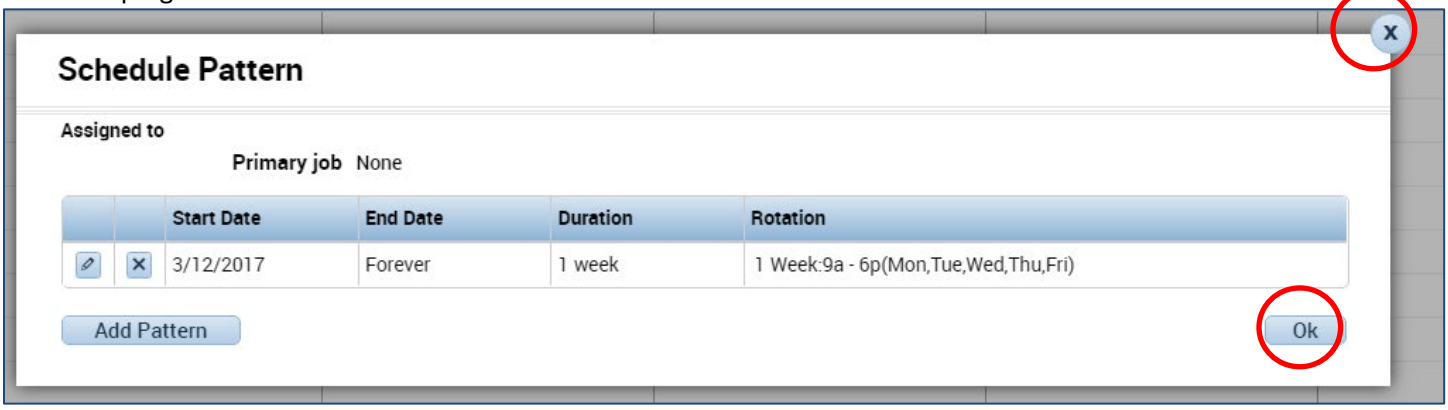
5. To erase any future schedules that were already in place, click on the Override other patterns checkbox (you will receive a warning message that you are deleting other schedules). If the schedule pattern is temporary, do not click on the override check box and insert and End Date in the End date field.
6. In Start Date field, enter the date that the schedule will begin.
7. Click Apply.



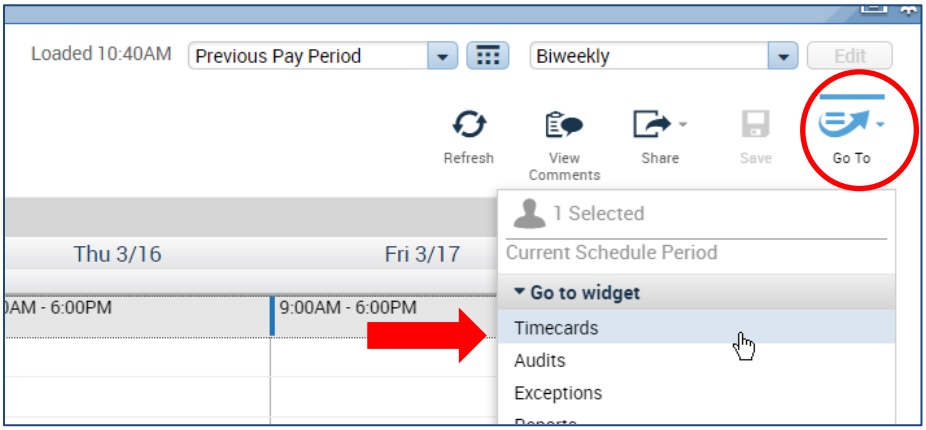
8. A window will appear asking you to confirm your changes. Click Yes to proceed



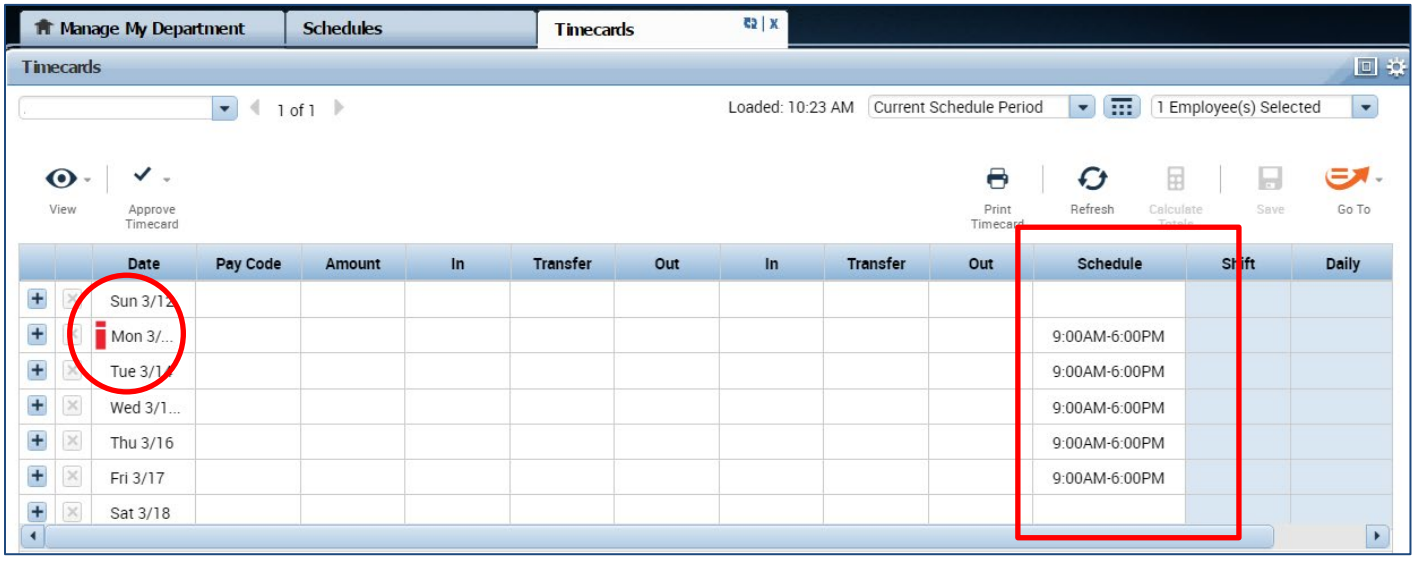
9. The results of your schedule will appear. Review your schedule and click ok if accurate. If the results are correct. Click the save icon at the top right. If the results are incorrect, click the X symbol and click refresh at the top right.



10. Click on the Go to Icon to navigate to timecards.



11. View Employees Schedule on the employees timecard (in this example the employee did not punch in at 9am on Monday according to their schedule which is why you see a red mark next to Mon)

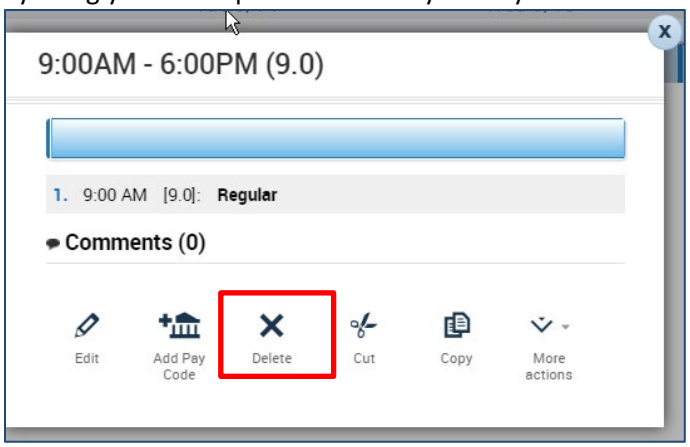


Edit or Remove a Schedule from a pre-defined shift

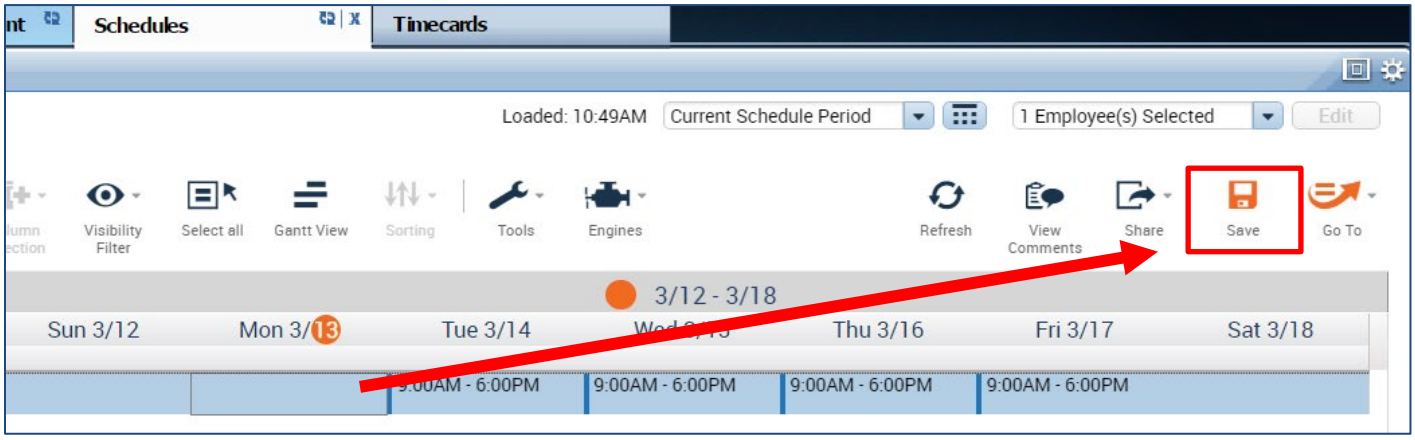
Go to the blue pane window at right of your CalTime screen and click on Schedules or you can access schedules from the employee's timecard by clicking on the Go To icon and click on Schedules

To delete the schedule just for that one day (temporary changing applying to that shift only)

1. Locate employee and right click on schedule under days of the week. Click Delete. This will delete the schedule that one day. You may also click inside the schedule and delete or edit any information in the field by using your Backspace button on your keyboard.

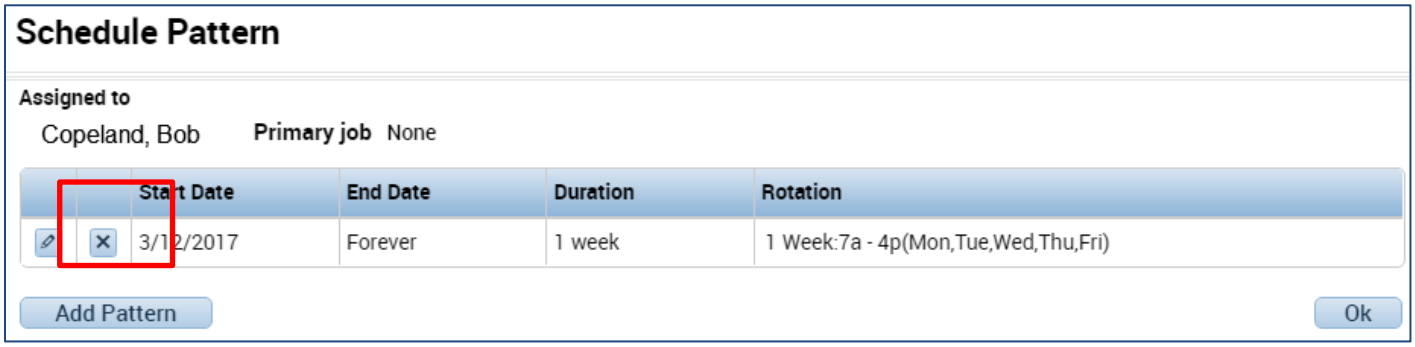


2. Click on Save icon

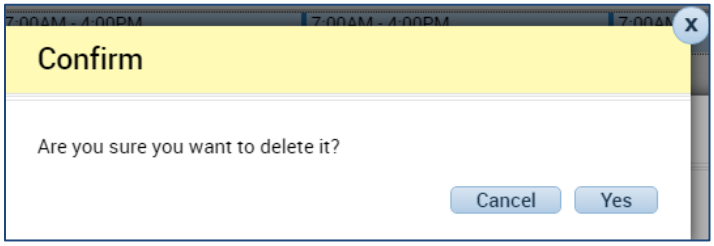


To delete the schedule completely for all future shifts:

1. Right click on employees name and click on Schedule Pattern. Click X symbol



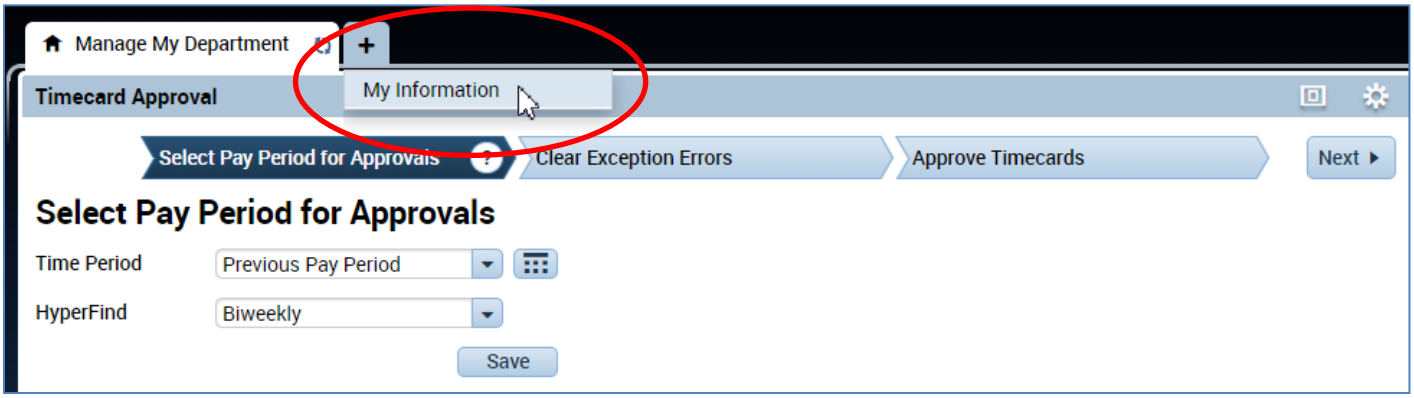
2. A Confirm message will appear, click yes and Ok (following window), and then Save icon at top right of schedules page.



ACCESSING, REVIEWING AND APPROVING YOUR OWN TIMECARD

Reviewing your Timecard

1. Click on the **plus icon** next to the **Manage My Department** tab and click on **My Information** (a My Information tab will open).



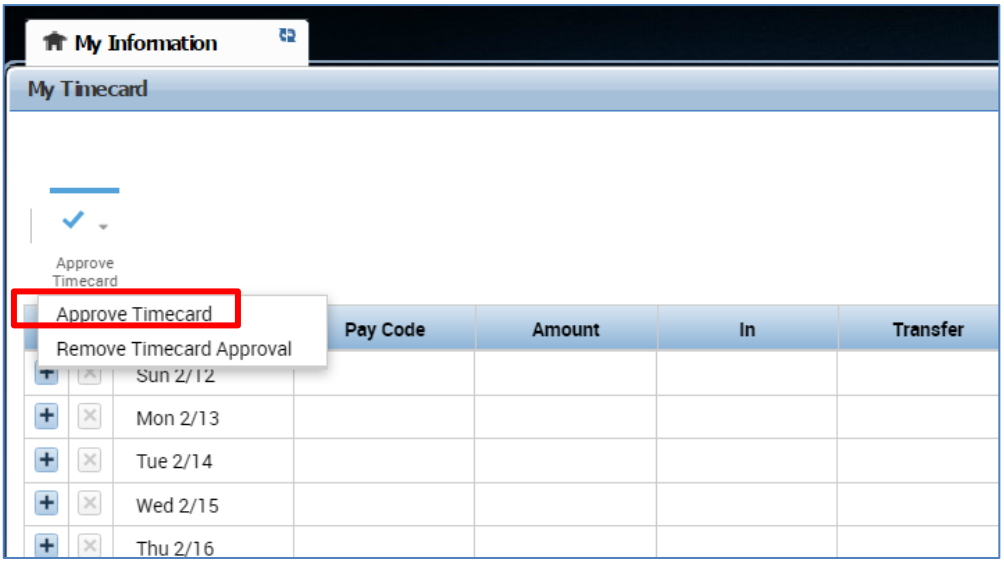
2. Ensure that you are accessing the correct Pay Period
3. Verify that the time at the beginning and end of your shift is accurate
4. Check your Shift and Daily Totals to verify that they add up to the hours of expected work (If you work outside your regular schedule (e.g., you worked night instead of day), you may need to make sure that your supervisor has entered a work rule transfer that will give you the proper overtime and shift differentials.
5. Clear any exception errors, if you see any red boxes on your timecard, you may hover your cursor on the red box and CalTime will tell you what the red box means. For example if you skipped a lunch, make sure your supervisor makes the proper adjustments.
6. Review any earned overtime or compensatory time by clicking the handle at the bottom of your timecard to reveal the Totals Tab (a summary of your hours recorded).
7. Verify that you used the correct pay codes for any leave recorded on your timecard (i.e. vacation, sick leave)
8. If you find any remaining discrepancies, please notify your supervisor who may be able to assist.

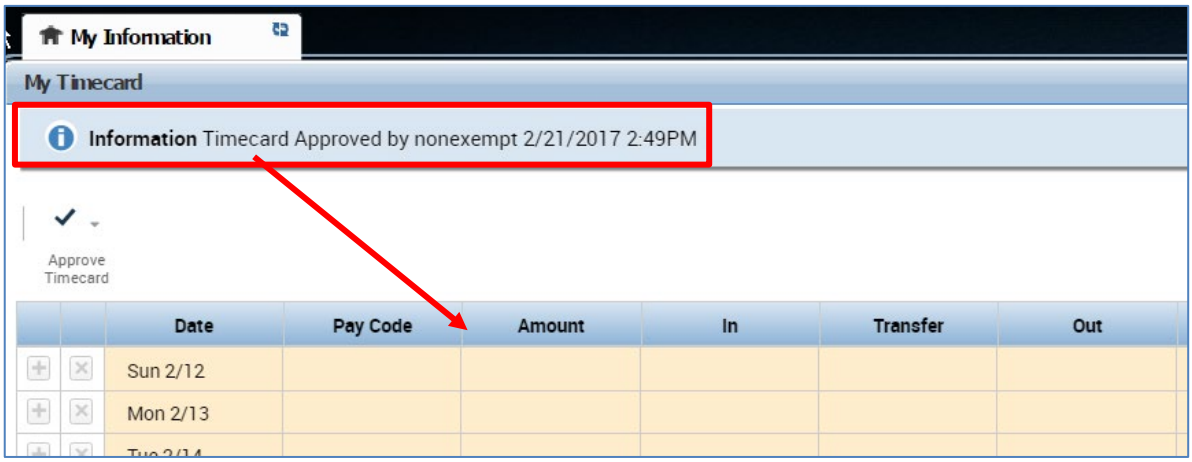
Add Timecard Approval

Once you have finished reviewing your timecard for accuracy, you may approve your timecard. Your approval is a submission of your timecard and an indication to your supervisor that you are done with your timecard and the hours are accurate. **The deadline for the timecard approval is the employees last work day of the biweekly pay period (which concludes every other Saturday at 11:59 pm. The Approval Deadlines for the calendar year may be found at** http://caltime.berkeley.edu/Employee%20and%20Supervisor%20Timecard%20Approval%20Deadlines

Once your supervisor approved your timecard, it is locked from further changes. If you need to make additional edits and your supervisor has already approved your timecard, you will need to reach out to your supervisor so they can remove their approval.

1. Click on “Approve Timecard” icon and click on “Approve Timecard”
2. Once approved, a confirmation appears and the timecard will change colors

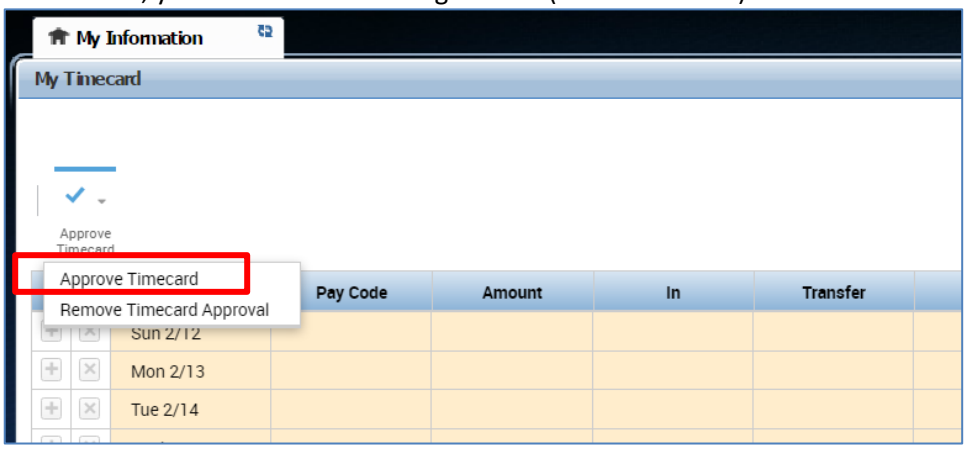




Remove Timecard Approval

If you need to make changes to your timecard after approving it, you need to first remove your approval to unlock your timecard for the update. However, if your supervisor has already approved your time, your timecard is locked for changes. Notify your supervisor if your timecard needs to be edited.

1. To remove timecard approval, click on the “Approve timecard icon” “**Remove Timecard Approval**” button.
2. Once approval is removed, your timecard will change colors (white timecard)



INFORMATION RESOURCES

Resources

1. **For additional questions**, please email caltime@berkeley.edu or call 510-664-9000, option 1.

2. **CalTime website and quick link access to CalTime:** http://caltime.berkeley.edu/

3. **CalTime Training documents:** **htt**p://caltime.berkeley.edu/training

4. **Employee Pay Period and Pay dates:** http://controller.berkeley.edu/payroll/paycheck-and-pay-dates

5. **CalTime Employee Approval Deadlines:**
   http://caltime.berkeley.edu/Employee%20and%20Supervisor%20Timecard%20Approval%20Deadlines

6. **Berkeley Regional Services (BRS):** Contact BRS for questions regarding your HR record or paycheck
   https://regionalservices.berkeley.edu/home

7. **Friendly Names:** Detailed information on how your HR record and job is tied to your timecard via the use of Friendly names setup in the Human Resource system called Human Capital Management (HCM).
   http://hr.berkeley.edu/hr-network/hr-systems/wfa/step-step/friendly-names

8. **CalTime Terms and Acronyms:** http://caltime.berkeley.edu/training/glossary/caltime

9. **Subscribe to CalTime Bconnected Calendar**: Follow the instructions at the link below to add the Approval Deadlines to your Bconnected calendar.
   http://caltime.berkeley.edu/Employee%20and%20Supervisor%20Timecard%20Approval%20Deadlines

CalTime Icons and Descriptions

	Approve Timecard Remove Timecard Approval
	Opens Printer friendly version of timecard
	Refreshes timecard after timecard has been saved
	Saves your edit or timecard action
	Allows you to select a range of dates by entering a Start Date and an End Date.
	This handle appears at the bottom of your timecard. If you click on the handle, you may view your hour Totals and leave Accruals
	Calculate the total hours adjusted on your timecard prior to saving. These hours will appear in the Totals section at the bottom of your timecard
	The My Timestamp section and Record Timestamp button only appears for RealTime employees that use a computer and must record time at the beginning and end of their shift.
	Access the following pages: Timecards, Audits, Exceptions, Reports, Schedules, Management my department, My information
	Provides the option to Print, Export to Excel or Export to CSV.
	Selects all employees and highlights the list in blue if you need to perform an action that applies to more than one employee.
	This provides a drop down list of columns. You can uncheck the check box to remove that column from your view.

Filter	Allows you to quickly filter your list of employees by entering an employee ID or entering the partial or full name of the employee
Timekeeping	A list will appear providing the option to Add Punch, Delete Punch, Add Pay Code, or Delete Pay Code. A new window will appear prompting you to select a date and decide on what action to take.
View	This icon does not apply to Berkeley. Please do not attempt to use it.
Quick Actions	Displayed on Schedules page. Provide quick actions to choose from pertaining schedules such as Assign, Unassign, Insert Shift Template, Pay code, Copy/Paste, Delete, Swap. Click on Quick Action to display options and click on Quick Action again to consolidation options that appear.
View	Pertains to Schedule Page and allows you to view by Employee, By Schedule Group, By employment Terms
Visibility Filter	Pertains to Schedules page: Provides a list of items to filter from such as Shift Time, Shift Label, Pay Code Name, Pay Code Short Name etc.
Gantt View	Pertains to schedules and provides a different employee view of schedules which includes a bar at the top that displayed not only the day of the week and date but also scheduled times.
Tools	This icon does not apply to Berkeley. Please do not attempt to use it.
Engines	This icon does not apply to Berkeley. Please do not attempt to use it.