

Timekeeping for Timekeepers

UNIVERSITY OF CALIFORNIA, BERKELEY

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INTRODUCTION

Welcome to CalTime, UC Berkeley's timekeeping system. This manual is a step-by-step user guide for Timekeepers. With CalTime, you can:

- Access an employee's timecard from any computer
- Adjust (hours) hours worked and any time off (leave) an employee has recorded
- Approve an employee's timecard at the end of each pay period
- Have visible access to an employee's time worked and leave.
- View an employee's vacation, sick leave, and comp time balances and total hours worked.
- Assign schedules
- Assist supervisors with questions regarding their employee's timecard
- Modify custom fields such as overtime and meal break designations
- Process historical edits (time adjusted for prior periods that have been signed off)
- Sign-off on departmental timecards

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/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. The timekeeper is responsible for auditing the department timecards and sign-off on the department.

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 <u>approval deadline</u>

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 the employees last day worked is Friday, the employee should review and approve their timecard by the end of the day Friday. Please note that the approval deadline may shift due to holidays. Employees will be notified if the approval deadline changes for a particular pay period. Approval deadlines are posted at <u>caltime.berkeley.edu</u>. An approval reminder will be sent to the employees Berkeley email address on the Friday before the pay period closes.

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 <u>approval deadline</u> (typically the Monday following the close of the biweekly pay period). The supervisor 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). 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.

Timekeepers are responsible for:

- Timekeepers have the ability do everything a supervisor or an employee can do in CalTime. However only timekeepers can edit historical pay periods that have been sign-off, edit additional information (i.e. meal break, OT, shift different) and run custom reports.
- Review departmental timecards to ensure employee's time is accurately recorded and complete
- Assist supervisors and employees with edits or questions regarding CalTime
- Work with employee and or supervisor to resolve errors (i.e. missed punches, meal break adjustments, correct job)
- Review and run audit reports (located at blu.berkeley.edu and reconciliation reports).
- Consider payroll deadlines and timing and determine if manual pay processing must take place in the PPS payroll system.
- Sign-off on the departmental timecards by the timekeepers <u>Sign-off deadline</u> (typically the Wednesday following the close of the biweekly pay period).

ABOUT THE EMPLOYEE

Employees Types (Non-exempt versus exempt)

There are two types of employees, Exempt and Non-exempt (depending on overtime eligibility) and these employees are further categorized into sub categories depending on if they are required to report time daily and the method on how they record time. A brief YouTube video (1:51 min) describes the difference between exempt and non-exempt employees (https://youtu.be/QpZqnLGUpWk).

Is the employee eligible for Overtime?

- Non-Exempts: Are hourly paid, eligible for overtime, and record time and leave in CalTime on a biweekly basis
- **Exempts*:** Are typically salary paid, not eligible for overtime, only report leave taken in CalTime and are paid on a monthly basis.
- *Exempt readers and tutors: These employees are not eligible for overtime however do report regular hours on a biweekly pay period.

Is the employee required to report time in Real Time or Anytime through the pay period?

- **RealTime employees** must record their time at the beginning of their shift and at the end of their shift in real time.
- AnyTime employees may record their time at any point during the pay period.

Please note that an employee cannot be realtime and anytime, they must be either realtime or any time for all jobs. What method does the employee use to record time?

- Computer: Staff and students may record time via a computer
- Terminal (Timeclock): Certain union represented groups and students use a timeclock to record time
- **Biometric:** Only physical plant uses biometrics (use your thumb print instead of cal 1 card to access a timeclock)

	Non-Exempts an Biweekly Readers		Exempt Monthly Salaried	
Method	AnyTime RealTime		AnyTime	Notes
				Staff and (*students are all Realtime). Most
				students are real-time with the exception of
Computer	Х	Х	Х	readers and tutors*.
Timeclock		Х		i.e. students, and some union employees
Biometric		Х		Physical Plant department only

Possible combinations of Employee Type and Time recording Method

*Although readers and tutors are typically anytime reports, if a reader and tutor has another position that is nonexempt, the employee will default to realtime and will need to report hours in realtime for all jobs. An employee cannot be both realtime and anytime in CalTime.

Pay rules

Pay rules are essentially the rules that govern how a biweekly hourly paid employee's time is calculated and is automatically setup when the employee imports into CalTime. With the exception of readers and tutors who are exempt and treated similar to non-exempts, most exempt employees are not assigned pay rules such as below. 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 non-exempt 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.

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 UCPath. When you enter time, **CalTime will automatically charge the time against the employee's primary job**, unless the employee/supervisor/timekeeper directs 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 non-exempt 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 the employees 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 <u>http://caltime.berkeley.edu/</u>. Click on the ACCESS button on the main page.



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

Berkeley UNIVERSITY OF CALIFORNIA	
CalNet Authentication Service	
CalNet ID:	
Passphrase (Case Sensitive):	
SIGN IN HELP	
Copyright © 2015 UC Regents. All rights reserved.	

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.

CalTime	Timekeeper Sign Out
🏦 Manage My Dep	artment 🔁
Genies	
QuickFind 👻 🔹	Q

Navigating in CalTime

In CalTime, a few features are available enabling you to easily navigate between different tabs. For Example, You can move back and forth between different tabs such as "Manage My Department" 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 **Manage My Department**.

CalTime			ଜ୍	Q
♠ Manage My Departme	Audits	Timecards	My Information	Exceptions X ·
Exceptions				
Exceptions Summary		Lo	padea 3:39PM Previous Pay P	Period 🔹 📰 All

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. **THE BLUE PANEL IS NOT AVAILBLE TO TIMEKEEPERS. DO NOT CLICK ON OR USE THE BLUE PANEL AT THE RIGHT. IF YOU DO YOU WILL RECEIVE THE FOLLOWING ERROR MESSAGE "Error the number of employees in this selection exceeds the maximum 2000. Please narrow your selection."** This error is because most timekeepers have global access providing them access to more than 2000 employees.



DEFAULT HOME PAGE: MANAGEMENT MY DEPARTMENT AND SIGN-OFF

The **Manage My Department** Tab will immediately open after logging into CalTime and is your default page. It will enable you use QuickFind, Select a Pay Period and access the Go To function. Please be aware that the Manage My Department Tab looks different for a Timekeeper role versus a Supervisor role. If you are assisting a supervisor, please look at the <u>supervisor training materials</u>. Via the Plus icon (next to management my department tab), you can click on the plus icon to access Administration and My information.

CalTime ↑ Manage My Departme	+	Administration enables access to the SETUP page such as Hyperfind query's and Query Manager.
Genies	Administration	
QuickFind -	My Information	My Information can be found by clicking on the
	People Timekeeping Approval	Plus Icon and clicking on My Information from the dropdown list.

Select employee population

1. Click on QuickFind and select Non-Exempt Pay Period Close or Exempt Pay Period Close

🔒 Manage My Department	Administration 😋 🗙 🛨	
QuickFind		•
QuickFind	e Timekeeping Approval Share	Go To

2. Narrow your search by clicking the dropdown tab at the right to select your hyperfind

🕈 Manage My Department	Administration 😋 🗙 🕂		
QuickFind		_	🗉 🌞
Biweekly Pay Period Close 🔻			
Previous Pay Period	None 💌	Edit	X
	Hyperfinds (38)		
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3. A list of Employees will appear, you can expand the columns by taking your mouse and hovering over the column line (a little line and two arrows will appear) while clicking down and dragging your mouse to the right. You can also click on the dropdown in the column header to sort.

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Genies															-//
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0129	Park, Marvin	FTRAN	FTRAN	4329U		n/a		Copeland, bo	b						
					Title	Empl Appr	Spvr Multi Frien	Spvr I Single Frien							
					4329	Sort Ascer	nding								
					5335	Sort Desce	ending								
					8486	Remove S	ort								
					5335	Group By t	his columr								
					4921	Remove fr	om groups								

Clear Exception Errors

Supervisors and Employees are responsible for correcting timecard errors such as missed punches. However if a timekeeper is asked to provide assistance, please reference the supervisor training materials on how to clear or edit an exception located at http://caltime.berkeley.edu/training.

Select Timecards for Sign-Off

- 1. Click the Select All Rows icon (selected rows will be highlighted). If you only wish to sign-off on certain employees you can click on the names while holding the Ctrl button on your keyboard
- 2. Click Approval Icon and click Sign-Off

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0129	Park, Marvin	FTRAN	FTRAN	43290	n/a	W, .	Jan							
0129	Copeland, Bob	FTRAN	FTRAN	5335C	n/a	Park	, Marvin							

Review Individual Timecards

- 1. Select Genie at top left and hyperfind at the right (If you know the name or employee ID, you can simply click on the drop down arrow and type in the EID and last, first name in the **QuickFind** field)
- 2. Verify you are in the correct pay period
- 3. Click on employee from the list until highlighted in blue
- 4. Click on the Go To Icon and select Timecards

Select All Rows Column Selection Iter People Timekeeping Approval Spyr Appr Spyr Single Frien HCM Manager Off Signe Off Miss Punc Appr Punc Miss Frien Miss Punc Miss Punc <t< th=""><th>Edit</th><th>t Emplo 🔽</th><th>FTRAN Non-Exempt</th><th>0</th><th></th><th></th><th>_</th><th></th><th></th><th></th><th></th><th></th><th></th><th>Senies</th></t<>	Edit	t Emplo 🔽	FTRAN Non-Exempt	0			_							Senies
Select All Rows Column Selection Iter People Timekeeping Approval Refresh Share Empl Employee Nam Home Dep Job Home Title Empl Spvr HCM Manager Signe Miss. Off Miss. Punc 110 Selected 0129 Park, Marvin FTRAN FTRAN 4329U n/a W, Jan	=		· · · ·	III (F	•	us Pay Period	A Previo	ded 4:30PN	Load			•	Pay Period Close	iweekly
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Exceptions People Editor						W, Jan		n/a		4329U	FTRAN	FTRAN	Park, Marvin	0129
						Park, Marvin		n/a		5335C	FTRAN	FTRAN	Copeland, Bo	0129
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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

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View	Approve Timecard	Sign Off Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Print I Timecard Schedule		culate Se otals Daily	e Go Period
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+ ×	Mon 2			8:00AM		5:00PM					8.5	8.5	8.5
+ ×	Tue 2/			00AM [*]		5:00PM					8.5	8.5	17.0
+ ×	Wed 3/			8:00AM		5:00PM					8.5	8.5	25.5
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		Account			Regular	- ruy	code				Anoun	(25.5
FTRA	AN-4329U-0/-/	/-/012115000/	/012981690/-/		negulai								

2. Once Sign-Off is added, the timecard will change colors (Grey)

		Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily	Period	
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+	×	Tue 2/			8:00AM		5:00PM					8.5	8.5	17.0	•

Scroll to Next Employee and Repeat Sign Off Process

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

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Timecan	ls												
Copela	nd, Bob	٩	5 of 28		12345678		Loaded: 3:08 PM	Previous Pay	/ Period	•	28 Empl	oyee(s) Sele	cted
Park, Ma Lyla, Anr									Print Timecard	O Refresh	Calculate Totals	Save	U

Refresh and View Updated Timekeeper Sign Off on Manage My Department Tab

After all employees timecards have been Signed Off, 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

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Biweekly F	Pay Period Close 🔻	•			Load	ded 5:04PN	M Previo	us Pay Period	• =	FTRAN	Non-Exem	npt Emplo		
Select All Rows		ter Peopl		g Approva	1						O Refresh	Share	- 🛃	
Empl	Employee Nam ^	Home Dep	Job Home	Title	Empl Appr	Spvr Multi Frien	Spvr Single Frien	HCM Manager	Signed Off	Miss Punch				
0129	Park, Marvin	FTRAN	FTRAN	4329U		n/a		Copeland, Bob	(~)		.5.5			

Supervisor Approval Multiple Friendly names Column: 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).

Supervisor Approval Single Friendly Name: 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.

BIWEEKLY PAY PERIOD SIGN-OFF

After employees and supervisors have approved timecards following the close of a biweekly pay cycle, timekeepers are responsible for Signing Off on the CalTime timecards. The deadlines for Timekeeper sign-off can be found at http://caltime.berkeley.edu/training/caltime-training-timekeepers. Sign-Off is typically by 5pm the Wednesday following the close of the biweekly pay cycle however it is occasionally on a Tuesday when the Central Payroll OTPRS deadline is earlier than usual.

Access employees Requiring Sign-Off

- 1. Select Biweekly Pay Period close from the Quickfind drop down menu
- 2. Select your HyperFind, in the HyperFind field at the top right. Since most timekeepers have global access, you will need to set up Hyperfinds to view a list of 2000 employees or less. In CalTime, you can only view 2000 employees or less otherwise you will receive an error message.
- 3. Verify you have selected previous pay period

 Manage My Department 	Administr	ration 😋 🗙	+						
QuickFind	-						Į	• *	ŧ
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QuickFind									
Biweekly Pay Period Close		O	🗸 🤟			Ð		- 13	
Timecard Exceptions	ble	Timekeeping	Approval		F	Refresh	Share	Go To	
Monthly Pay Period Close	_								
Monthly Employee LWOP		Job Home	Title	Empl	Spvr	Spvr	HCM Mana	aer S	s
Custom Fields Summary				Appr	Multi	Single			
Accrual Leave Balances					Frien	Frien			

1. You will see a list of employees with the following information:

Biweekly	Pay Period C	lose 🔻					Lo	aded 8:38AM	Previou	s Pay Peri	od	•		C- All No	n-Exempt \$	Studen 💌	Edit
Select All Rows	Column Selection			ekeeping Ap	proval										O Refresh	Share	Go To
Empl	Employee Na	Home De	Job Hom	Title	Empl Appr	Spvr Multi Frien	Spvr Single Frien	HCM Ma	Signe Off	Miss Punch	REG	OTS	OT-	OT2	CTS	СТР	VAC

Employee Number: Unique Ten digit number represented the employees ID number

Employee Name: Last Name, First name

Home Department: Five Alpha letter code representing employees department

Title Code: Four digit code representing employee's job

Employee Approval: A check mark in the Employee Approval column indicates the employee has approved their timecard.

Supervisor Approval Multiple Friendly Names: A number in the Supervisor Approval column indicates how many supervisors have approved the timecard. An employee may have more than one supervisor. No number indicates the supervisor has not approved the timecard

Supervisor Approval Single Friendly Names: A number in the Supervisor Approval column indicates how many supervisors have approved the timecard. An employee may have more than one supervisor. No number indicates the supervisor has not approved the timecard

SICK = sick leave

HOP = Holiday Pay Premium

Holiday = holiday pay hours

Other Pay Codes = miscellaneous rarely used pay codes

Pay Code Total Actual = the total number of hours charged to regular time worked and all additional pay codes for the pay period

Note: To group unapproved timecards together click the Employee Approval and Supervisor Approval column headers. To group timecards with Missed Punches indicated click that column header.

Review the Timecard Data

- 2. Look at the numbers in the Pay Code Total Actual column.
- **3.** Non-Exempt employees are paid bi-weekly and would normally have 80 hours in this column. There can be various reasons an employee may have less than 80 total hours for a pay period.
- 4. Look for any other indicators the timecard may not be accurate such as missed punches and no approvals.
- 5. Contact those supervisors and ask them to complete their review and approval process. Give them a deadline.

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Genies																	E
Biweekly	Pay Period Clos	e 🕶					Loa	ded 8:54AM	Previous	Pay Perio	d	-		- All Non-	-Exempt Sti	uden 💌	Edit
Select All Rows	Column F Selection	Iter Peo	-												O Refresh	Share	Go To
Empl	Employee Na.▼	Home De	Job Hom	Title	Empl Appr	Spvr Multi Frien	Spvr Single Frien	HCM Ma	Signe Off	Miss Punch	REG	отѕ	OT ≁	OT2	CTS	СТР	VAC
0111	Park, Marvin	UFOPS	FVAUX	4627U		n/a	(Jackson			64.0						

Sign-Off on Timecards

- 6. Choose Select All Rows to select all timecards (the employees rows will highlight in blue to indicate you have selected them)
- 7. Click on the Approval Icon and click Sign-Off
- 8. Click Yes to confirm you would like to Sign-Off



- 9. Click the Refresh
- **10.** The check mark in the Signed Off column indicates a successful sign-off for this employee group.

Note: Timekeepers must sign off even if the supervisor has not approved the timesheets. Any time or leave on the timecards will pass to PPS regardless of missing approvals.

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			Approv Remov Sign Of	e Time		oproval			•								

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. Insert the employee ID or Name in the QuickFind field

🕈 Manage	e My Depar	tment 쭽	Timec	ards				
Genies								
QuickFind 🔻	*Copelan	d, Bob		٩	7		Current Pay Period	•
	iii+-	\mathbb{Y}	()	0	× .		-	E1 .
Select All Rows	Column Selection	Filter	People	Timekeeping	Approval		Share	Go To
	Na	me			ID	Primary Labor Account		

2. 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.

ft I	Mana	ge My Depa	rtment	Timecards		x 25									
ino	carde													- /	Į
Cope	eland E	Bob	• • 1	of 2 🕨 012	2345678			Load	ed: 4:54 PM	revious Pay	Period	. 🖬 1	Employee(s)	Selected	
6		v .	al -								–	0	a		
Vie			Sign Off								Print			ave Go	
VI	ew	Approve Timecard	Sign Off								Timecard		tals	ave G	0
		Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily	Period	
+	×	Sun 2/													
+	×	Mon 2			8:00AM		5:00PM					8.5	8.5	8.5	
+	×	Tue 2/			8:00AM		5:00PM					8.5	8.5	17.0	
+	×	Wed 3/			8:00AM		5:00PM					8.5	8.5	25.5	
								*							
То	otals	Accruals													
All	1		-	All		•									
			Account			_	Pay 0	Code				Amount		Ĩ	
			(010115000)	012981690/-/	,	Regular		e ang de la						25.5	

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

	Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily	Period
+ 🗵	Sun 3/				0								
+ ×	Mon 3/			8:00AM		5:00PM					8.0	8.0	8.0
+ ×	Tue 3/			8:00AM		5:00PM					8.0	8.0	16.0
+ ×	Wed 3/			8:00AM		5:00PM					8.0	8.0	24.0
+ ×	Thu 3/						\frown						24.0
. .							-		н	ANDLE			
Totals	Accruals												
All			All		•								

PRINT A COPY OF THE 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.

🏦 Mana	ge My Depa	artment	Timecards	;	2) X 25						
imecards	;										
Copeland I	Bob	• • I	of 2 🕨 012	2345678			Loade	d: 4:54 PM	Previous Pay	Period	
O - View	Approve Timecard	CJ - Sign Off								Print Timecard	O Refresh Co
	Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift
+ ×	Sun 2/										
+ ×	Mon 2			8:00AM		5:00PM					8.5
+ ×	Tue 2/			8:00AM		5:00PM					8.5
+ ×	Wed 3/			8:00AM		5:00PM					8.5

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

Non-exer	npt, Employ	/ee	13313313	3		Curr	rent Pay P	eriod				
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.

Ħ	Mana	ge My Depa	artment	Timecard	s	X 52								
Time	ecards	;						_						
Сор	eland,	Bob	•	1 of 29 🕨 0	12345678			Loaded	2:46 PM Curr	ent Pay Per	riod	All	Home	
	• iew	Approve Timecard	ر آ ~ Sign Off Pay Code	Amount	In	Transfer	Out	In	Transfer			fresh Calcu Shift	late Sa	
+	×	Sun 2/	Pay Code	Amount		Induster	out		Indiisiei	out	Schedule	Shirt	Daily	Pellou
+	×	Mon 2									-			
+	×	Tue 2/			8:00AM		5:00AM							
+	×	Wed 3												

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

A	Mana	age My Depa	artment	Timecard	s	X 52									
Tim	ecards	s		-											
Co	peland	l, Bob	•	1 of 29 🕨	012345678			Loaded	2:46 PM	Current Pay	Period	• 📰	All Home		•
	• /iew	Approve Timecard	CJ - Sign Off								Print I Timecard	O Refresh	Calculate Totals		Go To
		Date	Pay Code	Amount	In	Transfer	Out	In	Transfe	er Out	Schedule	Shift	Daily	Perio	d 🧧
+	×	Sun 2/													
+	×	Mon 2													
+	×	Tue 2/			8:00AM		5:00AM					20.	0 20.0	20.	.0
	(m)														

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.

1	t Mana	ige My Depar	tment Timeca	ds	x \$2									
Tim	necards	5												L
	Copela	nd, Bob	🔹 🖣 1 of 29 🕨	012345678			Loaded:	2:46 PM	Current Pa	y Period	-		lome	
	O - View	Approve Timecard	د را - Sign Off Pay Code	Amount	In	Transfer	Out	In	Transfer	Print Timeca	Refres		late S	ave Go
+	×	Sun 2/26	Fuy Code	Anodin		Indiater	out		Tunorer	out	Schedule	Jiiit	Dully	Penou
+		Mon 2/27												
+	×	Tue 2/28			8:00AM		1:00PM					20.0	20.0	20.0
+	×		Sick Leave Taken	4.0										

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.
- 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.

Ħ	Mana	age My Depar	tment	Timecards	C;	x c									
Time	ecard	5													
. Ci	opelan	d, Bob	• • 10	of 29 🕨 01234	45678		Ľ	oaded: 2:46 P	M Cur	rent Pay Perio	d	•	All Home		•
	● • /iew	Approve Timecard	ር ታ Sign Off							P	rint ecard	O Refresh	Calculate Totals	Save	Go To
		Date	Pay	y Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily	Peri ᄎ
+	\times	Sun 2/26	Please Choo	ose:											
+	×	Mon 2/27	Vacation Le Sick Leave	eave Taken 🛛 🛃	,										
+	×	Tue 2/28		ive Leave wi		8:00AM		1:00PM					20.0	20.0	2
+	×		Bereavemer	oliday Taken nt-Sick Leave	4.0										
+	×	Wed 3/01	Callback Wo Call In Charge Nur	-											2
+	\times	Thu 3/02													2

5. Record Hours

Acceptable Formats for Entering Pay Code Amounts

Acceptable Format	Example	Interpretation by CalTime
Leading zeros	07	7 hours
(optional)	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.

A	* Man	age My Depar	tment Timecar	ds	X 25									
Tim	ecard	s												
	Copela	and, Bob	▼ ◀ 1 of 29 ▶ 0	012345678			Loaded:	2:46 PM	Current Pay	/ Period	•	All H	Home	-
View Approve Sign Off Timecard Sign Off Calculate Timecard Totals													ave Go To	
		Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily	Period
+	\times	Sun 2/26												
+	×	Mon 2/27												
+	×	Tue 2/28			8:00AM		1:00PM					20.0	20.0	20.0
+	×		Sick Leave Taken	4.0										
+	×	Wed 3/01												20.0

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.

🏦 Man	age My Depar	tment Timeca	rds	X 25									
Timecard	s												
Copela	and, Bob	▼ ◀ 1 of 29 ▶	012345678			Loaded:	2:46 PM	Current Pay	Period	•	All H	lome	
View Approve Sign Off Timecard Print Refresh Calculate Se Totals											ave Go		
	Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily	Period
+ ×	Sun 2/26												
+ ×	Mon 2/27												
+ ×	Tue 2/28			8:00AM		1:00PM					20.0	20.0	20.0
+ ×		Sick Leave Taken	4.0										
	Wed 3/01												20.0

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 <u>work-rule transfer</u>.

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 the supervisor 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)

 First determine your employees pay rule Here is an example of how a pay rule appears for an employee <u>NX_NONEX_OTP 08 Day 60D</u>



How to view am employees Pay Rule

1. Use your mouse to right click on an employee's name via list on the Manage My Department Default page or on the Timecards Page. A window will appear with the employees assigned pay rule.



2. A new window will appear, showing detailed information about the employee. The Pay rule information will appear at the top.

The example screen shot above 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 temporary change in an employee's standard work rule for a specific 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.

Ħ	Man	age My Depart	tment Timecards	c	x 2										
l ime	ecard	s													
Cop	peland	, Bob	▼ ◀ 2 of 29 ▶				Loaded:	3:40 PM	Current Pay	/ Period	•	All H	ome		•
	•	1.								0	G				
			G. / -												
V	/iew	Approve Timecard	Sign Off							Print Timecar	Refrest	Calcula Totals		ve Go	Го
		Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily	Period	
+	×	Sun 2/26													
+	×	Mon 2/27		L L	0.00AW		5.00PW					8.0	8.0	8.0	
+	×	Tue 2/28			8:00AM	;PPSM_NonEx_OTP Day 30d DTLAB-4919U-0/////	5:00PM	6	1			8.0	8.0	16.0	
+	\mathbf{x}	Wed 3/01				DTLAB-4920U-0///// Search								16.0	l
		Thu 3/02												16.0	

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

Fransfer		
Name Labor Accou Work Rule	Cop eland, Bob It	
Labor Account Work Rul		Clear All
ppsm		Clear All
PPSM_NonEx_CTP Day 00 PPSM_NonEx_CTP Day 30		Í
PPSM_NonEx_CTP Day 30 PPSM_NonEx_CTP Day 30 PPSM_NonEx_CTP Day 60	ISS	
PPSM_NonEx_CTP Day 60 PPSM_NonEx_CTP Day 60 PPSM_NonEx_CTP Day CE		
PPSM_NonEx_CTP Wknd (PPSM_NonEx_CTP Wknd 3		Ť
		Cancel 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.

	● • /iew	Approve Timecard	C√ → Sign Off					į	Print Timecard	O Refresh	Calculate Totals	Save	Go To
		Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily
+	×	Sun 2/26										\frown	
+	×	Mon 2/27			8:00AM	;PPSM_NonEx_CTP Day 30d	5:00PM					8.5	8.5
+	×	Tue 2/28			8:00AM		5:00PM					8.0	8.(

Permanent Pay rule change to additional fields

- 1. Open the employees timecard
- 2. Click on Go To icon and select People Editor (a people editor tab will open)

												1
Copelan	d, Bob	▪ ◀ 1 of 29 ▶	012345678			Loaded:	2:46 PM	Current Pa	y Period	•	All Home	
•	v .								0	¢	C 🖬 🛛 🖬	E
View	Approve Timecard								Print Timeca	t Refi	_	G
	Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	1 Selected	
×	Sun 2/26										Current Pay Period	
×	Mon 2/27										▼ Go to widget	
×	Tue 2/28			8:00AM		1:00PM					Audits	
		Sick Leave Taken	4.0								Exceptions	_
×											People Editor	
×	Wed 3/01											
	Wed 3/01										- Reports Rule Analysis	

3. Click on Additional Information

÷ (
History		
Person	Job Assignment	
• Per	son Summary	
En	ployee	
E	Employment Status:	Active
ł	Hire Date:	7/01/2014
	Appointment Type:	2
▶ Gen	eral Information	
► Add	itional Information	
 Pers 	son's Dates	

4. Click on field to the right and insert modified information. For example, If you are permanently changing an employee from a 30 lunch to a 60 minute lunch, you would type in 60 in the column next to Meal Length.

Person	Job Assignment	
- Ac	ditional Information	
	Additional Information	
	Appointment Type	2
	Home Department	KNBAM
	Comp Time Election	Ν
	Meal Length	30
	Shift Length	08
	Title Code	6102C
	Shift Occurrence	D
	Job Dept ID	KNBAM

Clearing exceptions (i.e. Missed Punches)

There are employee employees that forgot 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 and 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 by the employee's supervisor however timekeepers may be asked to assist.

- 1. To access errors from the Manage My Department (Default tab), select the applicable genie (at the top left) by clicking the drop down arrow or insert the name or employee id in the quickfind field.
- 2. Click on the applicable pay period and the select the hyperfind at the top right.
- 3. Click on the Go To icon and select Exceptions

ienies							_						12
weekly F	Pay Period Close	•			Load	ded 4:30PN	A Previo	us Pay Period	•		FTRAN Non-Exempt Emplo	0 💌	Edit
= *	iii(+ -		. 0	1.							Ø F	-	
Select All Rows		lter Peopl		ig Approva	al					Г	Refresh Sha	are	Go To
Empl	Employee Nam	Home Dep	Job Home	Title	Empl	Spvr	Spvr	HCM Manager	Signe	Mi	L 110 Selected Previous Pay Period	1	
					Appr	Multi	Single	·······································	Signe Off	PL	Previous Pay Period		
						Frien	Frien			- 1	▼ Go to widget		
0129	Park, Marvin	FTRAN	FTRAN	432911		Frien	Frien	W, Jan			 Go to widget Timecards 		
		FTRAN	FTRAN	4329U		n/a	Frien			F	Timecards Audits		
	Park, Marvin Copeland, Bo	FTRAN	FTRAN FTRAN	4329U 5335C			Frien	W, Jan Park, Marvin			Timecards Audits Exceptions		
0129 0129						n/a	Frien				Timecards Audits		

4. 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.

🏦 Manage My Department	Exceptions	C2 X					
Exceptions							□ ‡
Current Pay Period	6 Employee(s) Selecte	-				0 🥃	M +)
			Details)				
Nam	e		Missed Punch	Schedule Exceptions	Cancelled Meal Breaks	Total	•
Copeland, Bob			1			1	
Park, Marvin			1			1	

- 5. 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. If you hover over the red box, a message will display in yellow.
- 6. 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.

🏦 Manage My Departm	ent Exceptions	x 25						
xceptions		_		_				
ime Period Current Pa show Summary	ay Period		cell to enter the puncl of the shift, enter the			Save Cano		
Copeland, Bob				View Timecard Show Schedule				
Copeland, Bob							General	
Date	Pay Code	Amount	In	Out	Transfer	Daily	Sum	
Date		Amount	lin 8:00am	Out				
Date Wed 3/01		Amount		out		Daily		
- ,		Amount		Out	Transfer	Daily	Sum	

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)

		Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily	Period
+	×	Wed 3/			8:00AM		5:00P					9.0	9.0	9.0
+	×	Thu 3/	Vacati	8.0					•				8.0	17.0
+	×	Fri 3/03			* MA00:8		5:00PM					9.0	9.0	26.0

2. Click on Comments (a comment window will open)

Punch Actions	
Date:	3/01/2017
Time:	5:00PM
Rounded Time:	3/01/2017 5:00PM GMT-08:00
Override:	Out Punch
Time Zone:	(GMT -08:00) Pacific Time (USA; Canada); Tijuana
Last Edit Date:	3/23/2017
Edit Made By:	Timekeeper, Any
Edit Comments	Justify Exception

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

Comment	
Comments (0)	
Select Comment	•
Search	
Correct Missed Punch	
Duplicate Punches	Add
Employe Forgot to Punch	
Employee Adjustment	
Employee forgot to punch ·	•
	Cancel OK

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

		Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule
13+	×	Wed 3/			8:00AM		5:00PM 🔎				
+	×	Thu 3/	Vacati	8.0							

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 a supervisor or employee needs to add or change entries for prior pay periods, the supervisor will need to contact their timekeeper (i.e. Campus Shared 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)
- 1. Open the timecard for the applicable employee. You can search by inserting employee ID in **quickfind** field.
- 2. Then select the prior pay period from the drop down list or select the applicable prior pay period range of dates by clicking on the calendar icon at the right of the drop down list.

🕈 Manage My Department 🗳	Timecards		
Genies			
QuickFind 🔻 🗼	<u>्</u>	Loaded 3:37PM	Previous Pay Period
Select All Column Filter	People Timekeeping Accruals	✓ • IIII • ? • • • • • • • • • • • • • •	Current Pay Period Next Pay Period Previous Schedule Period
Name	▲ ID	Primary Labor Account	Current Schedule Period
			Week to Date
			Last Week Yesterday
			Today Yesterday,Today,Tomorrow
			Yesterday plus 6 days Last 30 days

3. A signed-off timecard will appear in grey

	• iew	Approve Timecard	C j - Sign Off	Accruals Actions							Print Timecard	O Refresh		ave Go T
		Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily	Period
+	X	Sat 12/												
+	×	Sun 1/												
+	×	Mon 1/	New Ye	8.0									8.0	8.0
+	×	Tue 1/0												8.0

- 4. Make the edit to the signed-off timecard by either adding the pay code and hours amount and/or inserting a start and stop time in the **In** and **Out** columns
- 5. In this example, we added vacation and 8 hours on Tuesday and a start time of 8am and stop time of 5pm on Wednesday.
- 6. Click Save.

	• iew	Approve Timecard	Cý - E - Sign Off Accruals Actions							Print Timecard	G Refresh	Calculate Totals	Save Go To
		Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily
+	X	Sat 12/31											
+	X	Sun 1/01											
+	X	Mon 1/02	New Year's Day Observ	8.0									8.0
+	×	Tue 1/03	Vacation Leave Taken	8.0	-	-							8.0
+	×	Wed 1/04			8:00AM		5:00PM	-	-			9.0	9.0
+	N	Thu 1 /05											

7. A window will open with Save Details. **"Do you want to include your edits in Totals."** If you click yes, then CalTime will send the time to the Payroll system (PPS). If you click No, CalTime will not send the time to Payroll and you will need to manually enter the time in the payroll system.

Save Details	Print hecar
Do you want to include your edits in the Totals?	Out
Cancel No Yes	J

Verifying Changes in the Audit Tab

8. After clicking Yes or No, you can view your change in the audit tab. Click **Go To** icon, and click on **Audits**.

	• View	Approve Timecard	C/ - 🚔 - Sign Off Accruals Actions							Print Timecard	Refresh Calculate Save Go To
		Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	1 Selected
+	×	Sat 12/31									Previous Pay Period
+	X	Sun 1/01									▼ Go to widget
+	X	Mon 1/02	New Year's Day Observ	8.0							Audits
+	×	Tue 1/03	Vacation Leave Taken	8.0 0							Exceptions People Editor
+	×	Wed 1/04			8:00AM		5:00PM				Reports
+	X	Thu 1/05									Rule Analysis
+	X	Fri 1/06									Schedules
+		Sat 1/07									Go to workspace

9. A new Audit Tab will open and you will want to select historical edits from the drop down tab under Category

🕈 Manage My Depart	ment	Timec	ards	Audits	25 X.		
ıdits							
Category:	Ту	/pe of Edit	t				
Audits	- A	AII	-				
Audits							
Historical Edits 🛛 🚽		1 of 1					
Moved Amounts		1011					
Signoff and Approval							
Comments	Tin	ne	Туре	Account	Pay Code	Amount	Work Rule
1/03/2017			Add Pay Code		Vacation Leave T	8.0	
1/04/2017	5:00PM		Add Punch				
1/04/2017	8:00AM		Add Punch				

10. Click on **Current pay period** because historical edits appear in the current pay period audit trail (If you clicked no to **include your edits in Totals**, the historical edit was not sent to payroll and will appear as PAID as shown on the right, see step 7, pg. 2).

Category: Historical Edits	-					Curr	ent Pay Period	•	1 Employee(s) Se	elected
	•	l of 1 🕨			<	\langle			Refr	esh Go To
Effective Date	Historical Date	Type of Edit	User	From Account	To Account	From Pay Code	To Pay Code	Amount	Comment	Note
2/24/2017	1/03/2017	Correction	cparkinson:k				Vacation Lea	8.0		
2/24/2017	1/06/2017	Correction	cparkinson:k				Vacation Lea	8.0 (paid)		
2/24/2017	1/07/2017	Correction	cparkinson:k				Vacation Lea	8.0 (paid)		

To Remove a Historical Edit

Go the applicable pay period and remove the pay code or hours previously entered. Click on Save. When
prompted to include in totals, please select Yes or No and answer in the same manner as the original entry. If you
do not remember, then you should verify what was processed in PPS. <u>Remember when prompted to include in
totals</u>. No means you are going to manually enter the adjustment in the payroll system, and Yes means the hours
will be sent by the CalTime system to the Payroll system.



2. Once the Historical Edit is deleted it will appear as a negative amount in the Audits tab.

Effective Date	Historical Date	Type of Edit	User	From Account	To Account	From Pay Code	To Pay Code	Amount	Comment
3/14/2017	2/27/2017	Correction	tginn:kro62-qw0		!! /-/-		Vacation Leave	-8.0 (paid)	
3/14/2017	2/27/2017	Correction	tginn:kro62-qw0		l 3/-/-		Vacation Leave	8.0 (paid)	

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.

dits												
Category: Audits		Type of Edit:						Current Pay Per	riod	• =		
/ Copeland, Bo	b	 4 2 of 28 	012345678								Ð	
		1 2 01 20									Refresh	n Go To
Date	Time	Туре	Account	Pay Code	Amount	Work: Bule	Override	Comment	Edit Date	Edit Time	Refresh User	
Date 2/27/2017	_				Amount	Work Bule	Override	Comment Correct Mi	Edit Date 3/09/2017	Edit Time 4:34PM (G		Go To Data Source Timecard
	Time	Туре			Amount	Won's Bule					User supervisor	Data Sourc

All Date: Associated Timecard Date All Time: The time you started or ended your shift Punch (Add/Edit/Delete) Type: The type of edit that was made Pay Code (Add/Edit/Delet ... Account: If a special job or friendly name was used Hours Worked (Add/Edit/... Pay code: The type of pay code used to categorize leave taken Duration (Add/Edit/Delete) Amount: Amount of hours associated with the Pay code used for leave taken Approvals/Sign-offs Work Rule: Will notate a work rule transfer Justification (Add/Edit/De.. **Override:** This field indicates that the time was an in punch or and out punch All Retroactive (Add/Edit/... Comment: Comments can be inserted by timekeepers or supervisors only Retroactive Punch (Add/E... , 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.

🕇 Mana	age My E	cal Edits All Amounts 2 of 29 f and Approval ents 2017 5:00PM Add Comm			/	Audits	65 X						
Audits													L
Audits	s	~			•				Current Pay Pe	riod	• 📰 29 E	mployee(s) Se	lected 💌
Histor Moved	Category: Audits Audits Historical Edits Moved Amounts Signoff and Approval Comments 2/2/1/2017 5:00PM								O Refrest				
5		provar	Туре	Account	Pay Code	Amount	Work Rule	Override	Comment	Edit Date	Edit Time	User	Data Source
2/21	72017	5:00PM	Add Comm					Out Punch	Correct Mi	3/09/2017	4:34PM (G	supervisor	Timecard E
2/27	7/2017	5:00PM	Add Punch					Out Punch	Correct Mi	3/09/2017	4:34PM (G	supervisor	Timecard E
2/27	7/2017	8:00AM	Add Punch				PPSM_No	In Punch		3/09/2017	4:34PM (G	supervisor	Timecard E

CALTIME 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)

★ Manage My Department Q +		
Genies	•	
QuickFind	Current Pay Period	
Select All Column Filter People Timekeeping Approval	Share Go To	Genies Help
Name ID	Primary Labor Account	Reports
		Schedules

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



Click on Time Detail 3.

🏦 Manage My Department	Reports	X 25
Reports 👻		
REPORTS		
SELECT REPORTS CHEC	K REPORT STATUS	
Run Report Refresh		
Create Favorite Save Favor	ite Duplicate Fav	orite Delete Favorite
Exceptions	^	
Holiday Credits		
Hours by Labor Account		
Hours by Labor Account with	Chart	
Person Job Assignment		
Punch Origin		
Timecard Audit Trail		
Timecard Sign-off, Request ar	id Appr	
Time Detail		
Marking Trees Disasting		

- 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.

REPORTS		
SELECT REPORTS CHECK REPORT STA	TUS	
Run Report Refresh		
Create Favorite Save Favorite Duplicat	e Favorite Delete Favorite	
+ All	A	
+ Accruals	THE DETAIL	
+ Configuration	TIME DETAIL	
+ Detail Genie	Description	Displays detailed data about each employee's punches, duration, and pay code edits. Summary data is displayed per employee, totaling time and money by labor level and pay code (excluding combined pay codes) and then by pay code
+ Roll-Up Genie		only (separately listing combined pay codes).
+ Scheduler	People	Previously Selected Employee(s)
_ Timecard	Time Period	Current Pay Period
Accrual Debit Activity Summary		
Accrual Debit Activity with Graph	Page Break between Employees	No 🔻
Accrual Detail	Actual/Adjusted	Show hours worked in this period only.
Employee Transactions and Totals	Sort by	Default 🔻
Exceptions	_ Output Format	Adobe Acrobat Document(.pdf) V
Holiday Credits		Adobe Actobal Document(.pdf) •

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

REPORTS

SELECT REPORTS	CHECK REPORT	STATUS				
View Report Ref	fresh Status Dele	te				
Name	Search				_	
Report Name	Format	Date In 🗸	Date Done	Status	Output	User
Time Detail	pdf	3/15/2017 11:28AM		Waiting	Screen	supervisor
Time Detail	pdf	3/15/2017 11:26AM	3/15/2017 11:27AM	Complete	Screen	supervisor

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

F 1	10	T T D '/	
Actual/Adjusted:	Show hours worked in this period only.	Insert Page Break After Each	h Employee: No
Query:	Previously Selected Employee(s)	Printed for:	supervisor
Time Period:	Current Pay Period	Executed on:	3/15/2017 11:26AM GMT-07:00
Time Detail		Data Up to Date:	3/15/2017 11:27:15 AM

Employee: Cop	eland, Bob			ID: 012345	678	Time Zone:		Pacific			
Status:	Active		St	atus Date: 7/2	0/2015	Pay Rule:		PPSM_Non	Ex_OTP Day	y 60d	
Primary Account DTLAB-ASST4-SS				Start 8/28/2016	End 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: Acco	int	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). CalTime does not calculate projected amounts. Please ignore Projected Takings, Projected Credits, Projected Balance and Balance w/o Proj. Credits.

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

🕈 Manage My Department 😋 🕂			
Genies		•	
QuickFind	Current Pay Period	•	
E III+ 7 & • Q	· · ·	E1 .	Genies
Select All Column Filter People Timekee Rows Selection	ping Approval Share	Go To	Help
Name	ID Primary Labor Account		Reports
	Account		Schedules

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

	🏦 Manage My Depa	rtment F	eports	X 25
F	Reports 👻			
F	REPORTS	_		
Ш	SELECT REPORTS	CHECK R	EPORT STATUS	
	Run Report Re	fresh		
	Create Favorite	Save Favorite	Duplicate Favorite	Delete Favorite
11	+ All			
	+ Accruals			
	+ Configuration			
	+ Detail Genie			
	+ Roll-Up Genie			
	- Scheduler			
	+ Timecard			
	+ working time Direc	tive		

3. Click on Accrual Detail

REPORTS			
SELECT REPORTS	CHECK RE	PORT STATUS	
Run Report Refr	resh		
Create Favorite	ave Favorite	Duplicate Favorite Delete Favori	te
+ All		<u>^</u>	
+ Accruals			
+ Configuration			
+ Detail Genie			
+ Roll-Up Genie			
+ Scheduler			
_ Timecard			
Accrual Debit Activ	ity Summary		
ACCTUAL DEDIL ACLIV	with Graph		
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

REPORTS	
SELECT REPORTS CHECK REP	PORT STATUS
Run Report Refresh	
Create Favorite Save Favorite	Duplicate Favorite Delete Favorite
+ All	
+ Accruals	
+ Configuration	ACCRUAL DETAIL
+ Detail Genie	Description Displays running accrual balances for each employee. For example, you can see what types of accrual transactions occurred in the past, when accrual balances were reset, and effective dates.
+ Roll-Up Genie	People Previously Selected Employee(s)
+ Scheduler	
_ Timecard	Time Period Current Pay Period
Accrual Debit Activity Summary	Output Format Adobe Acrobat Document(.pdf) 🔻
Accrual Debit Activity with Graph	
Accrual Detail	

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.

REPORTS										
SELECT REPORTS CHECK REPORT STATUS										
View Report Refresh Status Delete										
Name Search										
Report Name	Format	Date In 🗸	Date Done	Status	Output	User				
Accrual Detail	pdf	3/15/2017 11:43AM		Waiting	Screen	supervisor				
Time Detail	pdf	3/15/2017 11:28AM	3/15/2017 11:28AM	Complete	Screen	supervisor				
Time Detail	pdf	3/15/2017 11:26AM	3/15/2017 11:27AM	Complete	Screen	supervisor				
Accrual Detail Time Period: Query:	Current Pay Perio Previously Selecte					Data Up to Date: Executed on: Printed for:		11:43:48 AM 11:43AM GMT-07:00		
--	---	--------	-----------------	--------------------	----------	--	-----------	----------------------------------		
Accrual Code										
Effective Date	Action	Amount		Running Balance	Pay Code	Source	Edit Date	Edited By		
Copeland, Bob			ID:	012345678						
Comp Time (He	ours)									
Sat 3/11/2017			Balance Forward	0.00						
Total Debi	5:	0.00	Total Credits:	0.00						
Sick Accrual (H	ours)									
Sat 3/11/2017			Balance Forward	0.00						
Total Debi	5:	0.00	Total Credits:	0.00						
Sick Leave (Ho	urs)									
Sat 3/11/2017	,		Balance Forward	0.00						
Total Debi	5:	0.00	Total Credits:	0.00						
Vacation (Hour	5)									
Sat 3/11/2017	-,		Balance Forward	0.00						
Total Debi	5:	0.00	Total Credits:	0.00						
Vacation Accru	al (Hours)									
Sat 3/11/2017			Balance Forward	0.00						
Total Debi	5:	0.00	Total Credits:	0.00						
Vacation Lost /	ccruals (Hours)									
Sat 3/11/2017			Balance Forward	0.00						
Total Debi	s:	0.00	Total Credits:	0.00						
Vacation Maxin	num (Hours)									
Sat 3/11/2017	(Balance Forward	0.00						
Total Debi	5:	0.00	Total Credits:	0.00						
Ahn, Natalie G			ID:	012542676						
Comp Time (He	ours)									
Sat 3/11/2017	/		Balance Forward	0.00						
Total Debi		0.00	Total Credits:	0.00						

BLU REPORTS

Non-Exempt Error Report via Blu

SCHEDULES

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

1. From the **Manage My Department** main menu, click on the applicable employee. Then click on the **plus** lcon next to **Manage My Department** and select **Administration**. Select Biweekly pay period close or monthly pay period close under Quick find. Select your population in the hyperfind section and click on the **Go To** lcon and schedules.

🔒 Manage	My Departm	ent	Administra	tion 😋 🗙	+						
QuickFind									ļ		*
Biweekly Pay	y Period Clos Loade	e 🗸 ed 12:13PM	Previous	s Pay Period	•		****All KB			Edit	
Select All Rows	Column Selection	Filter	People	Or Timekeeping	🗸 🖕 Approval		O Refresh	Shere:		Go To	Ť
						3 Selected Previous Pay Pe	eriod				
						Go to widget Timecards Audits Exceptions People Editor Reports Rule Analysis					
						Schedules Go to worksp	ace 🖑				

- 2. A **Schedules** tab will open for all 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)

	🏦 Manage My Departm	ent	Schedu	es	X 55		
:	Schedules						
						Lo	aded: 9:2
	Quick View (Column election	Visibility Filter	Select all	Gantt View	Sorting	Tools
	By Employee						
	Name 🝝	Sun 3/12 M		Мо	n 3/13	Tue 3/14	
ļ	Copeland, Bob						
	Copeland, Bob			=1.			×
	Schedule Pattern	Add P Code	ay V	iew dule			

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)

ssigned to							
issigned to	Primary job	None					
S	tart Date	End Date	Duration	Rotation			
dd Pattern							
Anchor Date:*	3/12/2017	Start Date:*	3/12/2017	End Date:	*	Clear	
					• Forever		
efine Pattern)	for: * 1	🖲 Week(s) 🔵 Day(s)			Overr	ide Other Pattern
dd Shift A	dd Pay Code 🕴 S	Shift Template 🔻 P	attern Templ 🝷		Items	in rotation	▼ Find
	No. Sunda	y Monday	Tuesday	Wednesday	Thursday	Friday	Saturday

3. Select pre-defined shift from list of shifts

Schedule Pattern						
Assigned to Primary j	ob None					
Start Date	End Date	Duration	Rotation			
Add Pattern Anchor Date:* 3/12/2017	Start Date:	3/12/2017	End Date:*	 Forever 	Clear	
Define Pattern for: * 1 Add Shift Add Pay Code	 Week(s) Day(s Shift Template 	-		Items ir	Overri	ide Other Patterns
No Sur	di Name D	Description		Thursday	Friday	Saturday
+ × 1	08301700 830 8 08301730 830 8 09001730 9a 9	30am - 5pm 30am - 530pm am - 530pm			Canc	el Apply
	09151745 915 9	am - 6pm 1 5am - 545pm 0am - 3pm	9am - 6pm			

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).

Schedule Pattern										
ssigned to		rimary job N	one							
	Start Dat	e	End Date	Duration	Rotation					
Add Patter	a:* 3/12/		Start Date:*	3/12/2017	End Date:	* 💽 Forever	Clear	ide Other Pattern		
dd Shift			ft Template 👻 Pa			9a-6p	- Over	Find		
	No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday		

- 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.

Schedule Pattern									
🛕 Warning	Selectin	g Override may	delete shifts or u	navailable days,	except for locked	days or shifts.			
Assigned to		rimary job Non	e						
	Start Da		i Date	Duration	Rotation				
Add Patter	Add Pattern								
Anchor Date	e:* 3/12	2/2017	Start Date:*	3/12/2017	End Date	:* Forever 	Clear		
Define Pattern for: * 1 Week(s) Day(s) Verride Other Patterns									
Define Patt	em ior: *	I • We	ek(s) 🔘 Day(s)				🗹 Overr	ide Other Pa	
			ek(s) 🗼 Day(s) Template 👻 Pat			9а-бр	✓ Overr	ide Other Pa	
					Wednesday	9a-6p Thursday	Øverr Friday		

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.

Assigned 1		job None			
	Start Date	End Date	Duration	Rotation	
ØX	3/12/2017	Forever	1 week	1 Week:9a - 6p(Mon,Tue,Wed,Thu,Fri)	

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

					~ ~
Loaded: 9:48AM	Current Schedule Period	All Home		•	Edit
	Ð	Ê	-		
	Refresh	View Comments	Share	Save	Go To
		👗 1 Selec	ted		
Thu 3/16	Fri 3/17	Current Sche	edule Period	1	
0AM - 6:00PM	9:00AM - 6:00PM	▼ Go to wid	get		
		Timecards		վեղ	
		Audits		6)	
		Exceptions			

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)

🏦 Manage	My Department	Schedules		Timecard	ls	2 X					
Timecards											
	•	1 of 1 🕨				Loaded: 10:2	3 AM Current	Schedule Per	riod 💌 🧰 1 Em	ployee(s) Seleo	cted 💌
O • View	Approve Timecard							Print	Refresh Calculat	te Save	Go To
	Date Pay Co	de Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily
🛨 🖉 SI	un 3/12										
н 🔄 м	lon 3/								9:00AM-6:00PM		
🛨 💌 τι	Je 3/1								9:00AM-6:00PM		
🛨 🗵 w	/ed 3/1								9:00AM-6:00PM		
H 🗶 T	hu 3/16								9:00AM-6:00PM		
🛨 🗵 Fr	ri 3/17								9:00AM-6:00PM		
🛨 🔀 Sa	at 3/18										
•											

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

nt 😨	Schedu	es	X 52	Timeca	ards								
	-												□
					Loaded	: 10:49AM	Current Sch	edule Period	•	1 Employ	vee(s) Select	ted 💌	Edit
į.	•		=	↓↑↓ -	×.	-			Q	Ê			(
lumn ection	Visibility Filter	Select all	Gantt View	Sorting	Tools	Engines			Refresh	View Comments	Share	Save	Go To
							3/12 - 3/18	}					
SL	ın 3/12	М	on 3/13	Т	ue 3/14	W	od 0, 10	Thu 3	/16	Fri 3/	17	Sat 3/	18
				9.00AN	1 - 6:00PM	9:00AM	I - 6:00PM	9:00AM - 6:0	00PM	9:00AM - 6:0	0PM		

To delete the schedule completely for all future shifts:

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

Sc	Schedule Pattern									
	Assigned to Copeland, Bob Primary job None									
	Start Date	End Date	Duration	Rotation						
Ø	3/12/2017	Forever	1 week	1 Week:7a - 4p(Mon,Tue,Wed,Thu,Fri)						
	Add Pattern Ok									

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

Are you sure you want to delete it?	
	Cancel Yes

HYPERFIND QUERIES/QUERY MANAGER VIA ADMINISTRATION

What is a HyperFind query?

HyperFind Queries enable users to view a list of employees based on selected filters. For example, you may be only interested in looking at active employees as of today's date that working in a specific department and have an FLSA of non-exempt.

A basic HyperFind used frequently by Timekeepers consists of:

- 1. Select Conditions criteria (for example; Active as of today, FLSA = Non-Exempt)
- Selecting condition joiners such as using And, Or, NOT (for example, Active as of today <u>AND</u> FLSA = Non-Exempt).

Select Conditions requirement (Additional Information fields)

If criteria from the Additional Information fields are going to be used in the HyperFind Query, specific syntax requirements must be observed:

- Numerical fields must always be two digits (e.g. 08 for 8 hours Shift Length)
- Alpha Characters must always be uppercase (e.g. N for non---exempt and E for exempt)
- Note. See the appendix of this document for a list of available Select Condition filters and location

How to use a Condition Joiners (via Assemble Query)?

After the conditions criteria is selected, the conditions will need to be assembled using the **And**, **OR**, **NOT** joiners. If the HyperFind query being created will be using multiple similar conditions, e.g., multiple **Job Dept IDs**, or multiple **Supervisor IDs**, be sure and use the **OR** joiner to join the similar conditions. The **OR** joiner will allow for multiple similar conditions to be joined, the **AND** joiner will actually restrict the ability of the query to retrieve the desired multiple conditions. The **AND** joiner is used to join disparate condition criteria, e.g., **Job Dept ID** and **FLSA** status.

The following is an example of a HyperFind Query with multiple condition filters (see blue) and condition joiners (see RED).

Select Conditions	Assemble Query	Test	
Selected Conditions			
AND OR NOT	Disassemble	Disassemble All	Delete
(Additional information Home	Department matches F I	RAN AND Additional info	prmation FLSA matches N AND Employee employed and working as of today) AND
(Additional information Title C	ode matches 5332C or A	Additional information T	itle Code matches 5332C OR Additional information Title Code matches 5333C OR Additional
information Title Code matche	es 5333C or Additional in	nformation Title Code m	atches 8213C OR Additional information Title Code matches 8485C OR Additional information Title
Code matches 8486C)			

Access HyperFind Queries via Setup

4. Once you have logged into CalTime, click on Plus icon (next to Manage My Department tab) and click on Administration from the drop down list.



- 5. The setup page will automatically open
- 6. To maximize the setup page, click on icon that appears at the top right (square within a square)
- 7. Click on Hyperfind Queries

🏦 Manage My Department 🛛 🛞 Administ	tration C2 X	
QuickFind		Setup 👻
QuickFind		Back to Setup
	ekeeping Approval Share Go To	Search SETUP Expand All Collapse All
Name ID	Primary Labor Account	Common Setup HyperFind Queries Query Manager

Create Hyperfind

8. Click New	
Setup 👻	□ 桒
Back to Setup	
Search	Setup > Common Setup
HYPERFIND QUERIES	
New Duplicate Edit Delete	Refresh

9. The select conditions panel will open on the left side of the setup page. (New Hyperfind queries are built using the available filters and adding required conditions specific to the filter topic.)



If you click Primary Account, all the options for all the labor levels will be available to add as a HyperFind condition. Example --- Primary Account is where specific Job (Friendly Name), Supervisor IDs, or Employee IDs would be selected as guery conditions.

HYPERFIND QUERIES Save Save As Ret	urn Refresh
Visibility Ad Hoc Select Conditions	Query Name* Ad Hoc Description
Filter General Information Name or ID Primary Account Additional Information Person's Dates Timekeeper Time Management Biometrics Scheduling User Information Role - Timekeeper	PRIMARY ACCOUNT Include Exclude people who meet this condition Summary Job Location Project Supervisor ID Employee ID LL6 LL7 Wild Card Selection

If you click Additional Information, the following options will be available to add as a HyperFind condition. It is recommended you use job department ID, rather than home department as a condition in your Hyperfind. FLSA status can be an important frequently used condition. Use N for non-exempt and E for exempt employees.

HYPERFIND QUERI	ES			
Save Save As	Return	Refresh		
Visibility Ad Hoc	•	Query Name *	Ad Hoc	Descri
Select Conditions	Asse	mble Query Te	st	
Filter		ADDITIONAL INFOR	MATION	
General Information		Include Exclude	de people who meet this condition	
Name or ID		Additional information	Appointment Type	•
Primary Account]	Appointment Type	-the
Additional Informat	lion	J	Home Department	
Person's Dates			Comp Time Election	
 Timekeeper 			Meal Length	
🛨 Time Management			Shift Length	
 Biometrics 			Title Code	
 Scheduling 	000		Shift Occurrence	
 User Information 			Job Dept ID	
🛨 Role - Timekeeper			FLSA	

10. The Select Conditions Header will appear on the left side of the window (as shown in examples above). The required conditions fields associated with the Select Conditions Header will appear on the right side of the screen.

In the example below, the FLSA from the additional information drop down was selected and and type E for exempt was entered in the field directly below the drop down list. The **Add** button will highlight in blue to prompt the user to Add the field. **Click Add**.

ADDITIONAL INFORMATION					
Include O Exclude	Include Exclude people who meet this condition				
Additional information FLSA					
E					
Selected Conditions	Add Update Delete				

11. If you want to exclude people with a certain condition, click on Exclude people who meet this condition, otherwise select include.

ADDITIONAL INFORMATION				
Include	e people who meet this condition			
Additional information	FLSA			
	E			
Selected Conditions	Add Update Delete			
Additional information FLSA matches E				

- 12. Click on Timekeeper and select Employee Status
- 13. Click on Active As of Today button
- 14. Click Add (this will add active employees as of today)

HYPERFIND Q	UERIES *				
Save	As Return	Refresh			
Visibility Ad Hoc	•	Query Name *	Ad Hoc		Descriptio
Select Conditi	ons Assemt	ole Query Te	st		
Filter		EMPLO	DYMENT STATUS		
General Inform	nation	Inclu	ide 🔍 Exclude people who	o meet this condition	ı
Name or ID		Statu	s: Active		-
Primary Ac	count				
Additional	Information	As of	Today		
Person's Da	ates		Specific Date	3/24/2017	
 Timekeeper 					
Hire Date					
Employmer	nt Status	Selecte	d Conditions Add	Update	Delete
Employmen	it Terms	Additio	onal information FLSA match	nes E	

15. After you click Add, you will see the condition appear in the selected conditions box at the bottom16. This will bring up employees that are exempt and active as of today.

Selected Conditions	Add Update	Delete	
Additional information FLS Employee employed and we			
To Edit or Delete Hype 17. To edit or delete		mble Query to Edit Condition or Delete Co	ondition
HYPERFIND QUERI	ES *		
Save Save As	Return Refresh		
Visibility Ad Hoc	Query Nam	e* Ad Hoc	Descriptio
Select Conditions	Assemble Query	Test	
Filter	E	MPLOYMENT STATUS	

18. Click on the condition in box (in blue below) and the NOT and Delete Button will highlight in blue. You only use the NOT button if you do not want to include a condition below or you can delete the condition entirely by clicking on Delete.

Save Save As	Return	
Visibility Ad Hoc	 Query Nar 	ne* Ad Hoc
Select Conditions	Assemble Query	Test
Selected Conditions		
AND OR NO	T Disassemble	Disassemble All Delete
Additional information FLSA	matches E AND	
Employee employed and wo	rking as of today	

To Test Hyperfind based on assigned conditions

19. To test your condition, click on Test. This will enable you to verify your results.

	ES *		
Save Save As	Return Refresh		
Visibility Ad Hoc	Query Name	e* Ad Hoc	
Select Conditions	Assemble Query	Test	
Selected Conditions			
AND OR NO	Disassemble	Disassemble All	Delete
Additional information FLSA	matches E AND		
Employee employed and wo	rking as of today		

To Save HyperFind

- **20.** After a successful test, click on save to start saving the new Hyperfind query. If you click on Save As, a window will appear enabling you to
 - To make this HyperFind visable to only you,
 - Select the drop down in the visibility field and click on Personal

HYPERFIND QUERIES								
Save	Save As	Re	turn	Refresh				
Visibility	Ad Hoc		•	Query Name				
Sel	Personal			nble Query				
Jen	Ad Hoc		i i i	lible Quely				

• You will be prompted to enter a Query name of the hyperfind and you made add a description. See example below.

HYPERFIND QUERIES *	
Save Save As Return Refresh	
Visibility Personal Query Name* Test report	Description Exempt FLSA, All Active employees
New Hyperfinds will display on HyperFind Queries main setup page	
Your new hyperfind will appear on the main setup page (see example)	

Query Name Visibility	

ASSIGN OR DELETE AND EXISTING HYPERFIND

A timekeeper can create and assign a person HyperFind to another timekeeper, manager, or supervisor. Some typical situations where a HyperFind query may need to be assigned are:

- A new timekeeper is replacing a departing a timekeeper
- A back up timekeeper needs to similar HyperFind views as the primary timekeeper.
- To assist a Manager with viewing a specific population

Access HyperFind Queries via Setup

21. Once you have logged into CalTime, click on the plus icon (next to the Manage My Department tab) and then click on Administration from the drop down list.

Calr.			Q	+		
Genies				_	ninistration	6
QuickFind 🝷	*			Му	Information	
	iii+-	$\overline{\mathbb{Y}}$			02 -	v .
Select All Rows	Column Selection	Filter	F	eople	Timekeeping	Approval

- 22. The setup page will automatically open
- 23. To maximize the setup page, click on icon that appears at the top right (square within a square)
- 24. Click on Query Manager

🕈 Manage My Department 💿 Administration 💿 🖏		
QuickFind	□ ‡	Setup -
QuickFind V Current Pay Period V III		Back to Setup
Image: selection Image: selection Image: selection Image: selection	Share Go To	Search SETUP Expand All Collapse All
	ry Labor :ount	Common Setup ▲
		Query Manager

Find Hyperfind based on Person with Existing Access (i.e. Creator or someone with access)

25. Following * (asterisk symbol), enter the name of the person that created the original HyperFind in the search field and click search.

QUERY MANAG	ER		
Duplicate Vie	w Assign Delete	Refresh	
* Park, Marvin		Search	
Name	Query Name	Description	
	KNBAM NE Employees		

26. Click on Hyperfind (it will highlight in blue) and you will have the ability to Duplicate, View, Assign, Delete, or Refresh the selected HyperFind.

Assign Hyperfind

27. Click Assign

Duplicate View	Assign Delete Refresh	
* Park,Marvin		Search
Name	Query Name	Description
Park,Marvin	KNBAM NE Employees	

- **28.** The Query Manager –Assign Query window will open. Select the name of the timekeeper or Manager who will be assigned the Hyperfind by searching for the name in the filter field or using the scroll down bar at the right of the list of names. Once you click on the name, the name will highlight in blue. If you selected the incorrect name, click on the name again and it will no longer be highlighted in blue.
- 29. Click save and you will be taken back to the Query Manager main page

QUERY MANAG	GER - ASSIGN QUERY *		
Query Name: KNBAM	NE Employees		
Return	e		
park			
	Name	•	T
Park, Marvin			

30. Following the * (asterisk symbol), enter the last name, first name of the person you just assigned the HyperFind query to and you should see the HyperFind appear in the their list of available HyperFinds.

Delete a Hyperfind

31. Follow steps #1-6 in this document and come back to this step and click on Delete.

	}	
Duplicate View	Assign Delete Refresh	
* Park,Marvin		Search
Name	Query Name	Description •
Park,Marvin	KNBAM NE Employees	

32. Click on Yes or No to confirm if you want to delete the HyperFind. Once you confirm yes to delete, you will be taken to the main HyperFind Query Manager page and you will see that the HyperFind has been removed.



ACCESSING, REVIEWING AND APPROVING YOUR OWN TIMECARD

Reviewing your Timecard

Click on the Plus Icon and the My Information from the drop down list. 1.

CalTime				a	dministration enables ccess to the SETUP age such as Hyperfind
🕈 Manage My Departme	Q	+		· ·	uery's and Query
Genies	-	Administration	6	N	lanager.
QuickFind 👻 🔭		My Information			
≡⊧ [+-	7 8	. • • • • •	1.	ir	our own timecard nformation can be
Select All Column F Rows Selection	ilter Pe	eople Timekeeping	Approval	Р	ound by clicking on the lus Icon and clicking n My Information
2. Ensure that you are	e accessing	the correct Pay F	Period		om the dropdown list.

- 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 (in 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. You may also email caltime@berkeley.edu for assistance.

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

My Timecard				
✓ <u> </u>				
Approve				
Timecard				
Approve Timecard		_		
Approve Timecard Remove Timecard Approval	Pay Code	Amount	In	Transfer
Approve Timecard Remove Timecard Approval Sun 2/12	Pay Code	Amount	In	Transfer
Remove Timecard Approval	Pay Code	Amount	In	Transfer
Remove Timecard Approval	Pay Code	Amount	In	Transfer
Remove Timecard Approval Sun 2/12 Mon 2/13	Pay Code	Amount	In	Transfer

🟦 My	Information	62				
My Time	card					
0 in	formation Timeca	rd Approved by none	empt 2/21/2017 2:4	9PM		
Approve						
Timecar	Date	Pay Code	Amount	In	Transfer	Out
+ ×	Sun 2/12					
+ ×	Mon 2/13					
	Tuo 2/14					

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)

Pay Code	Amount	In	Transfer	
	Pay Code	Pay Code Amount	Pay Code Amount In	Pay Code Amount In Transfer

Resources

- 1. For additional questions, please email <u>caltime@berkeley.edu</u> or call 510-664-9000, option 1.
- 2. CalTime website and quick link access to CalTime: <u>http://caltime.berkeley.edu/</u>
- 3. CalTime Training documents: <u>http://caltime.berkeley.edu/training</u>
- 4. Employee Pay Period and Pay dates: <u>http://controller.berkeley.edu/payroll/paycheck-and-pay-dates</u>
- 5. CalTime Employee Approval Deadlines: http://caltime.berkeley.edu/Employee%20and%20Supervisor%20Timecard%20Approval%20Deadlines
- 6. **Berkeley Regional Services (BRS):** Contact CSS for questions regarding your HR record or paycheck <u>https://regionalservices.berkeley.edu/home</u>
- 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 UCPath <u>https://caltime.berkeley.edu/april-27th-new-caltime-friendly-name-application-hr-admin-released</u>
- 8. CalTime Terms and Acronyms: <u>http://caltime.berkeley.edu/training/glossary/caltime</u>
- 9. Subscribe to CalTime Bconnected Calendar: Follow the instructions at the link below to add the Approval Deadlines to your Bconnected calendar. <u>http://caltime.berkeley.edu/Employee%20and%20Supervisor%20Timecard%20Approval%20Deadlines</u>

CalTime Icons and Descriptions

	and Descriptions
v .	Approve Timecard
Approve	Remove Timecard Approval
Approve Timecard	
	Opens Printer friendly version of timecard
e	
Print	
Timecard	
	Refreshes timecard after timecard has been saved
C+	
•J	
Refresh	
	Saves your edit or timecard action
Save	
	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
Ħ	Totals section at the bottom of your timecard
_	
Calculate Totals	
	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.
Record Timestamp	
<u>.</u>	
= .	Access the following pages: Timecards, Audits, Exceptions, Reports, Schedules, Management my
	department, My information
Go To	
-	Provides the option to Print, Export to Excel or Export to CSV.
Share	
	Selects all employees and highlights the list in blue if you need to perform an action that applies
= *	to more than one employee.
Select All Rows	
	This provides a drop down list of columns. You can uncheck the check box to remove that column
iii+ -	from your view.
Column Selection	
	1

₽ 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.