CalTime

# INSTRUCTIONAL GUIDE

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/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 <u>employees are required</u> 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
  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 caltime.berkeley.edu. 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 approval deadline (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 Sign-off deadline (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)

**Possible combinations of Employee Type and Time recording Method**

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

*Although readers and tutors are typically anytime reports, if a reader and tutor has another position that is non-exempt, 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.

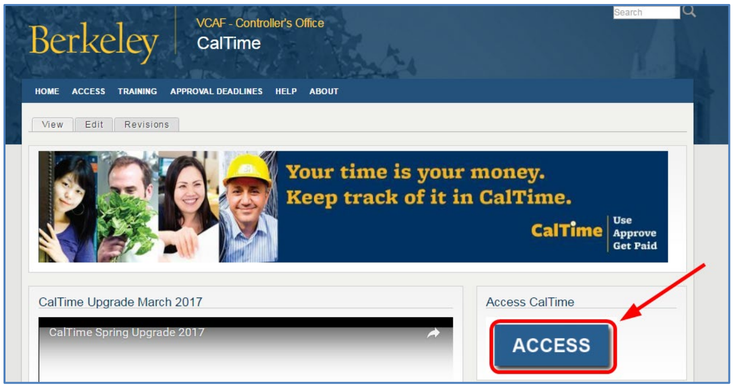
**Examples:** If an employee punches in at 7:23am, the system records and displays the time in CalTime as 7:23am, but for the purposes of calculating the number of hours to be paid, the system will round the time (internally) to 7:30am. Similarly, if an employee punches out at 4:05pm, the system records 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) |

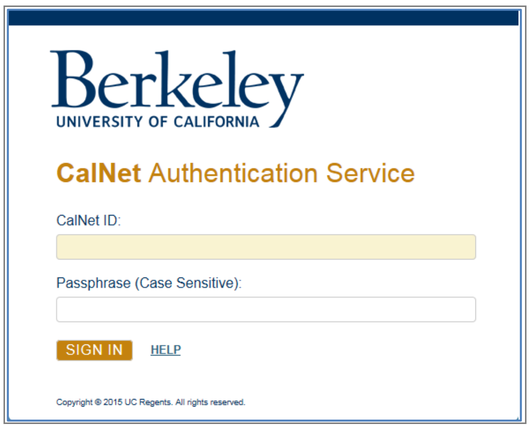
# ACCESSING AND NAVIGATING IN CALTIME

## Log in and Log out of CalTime

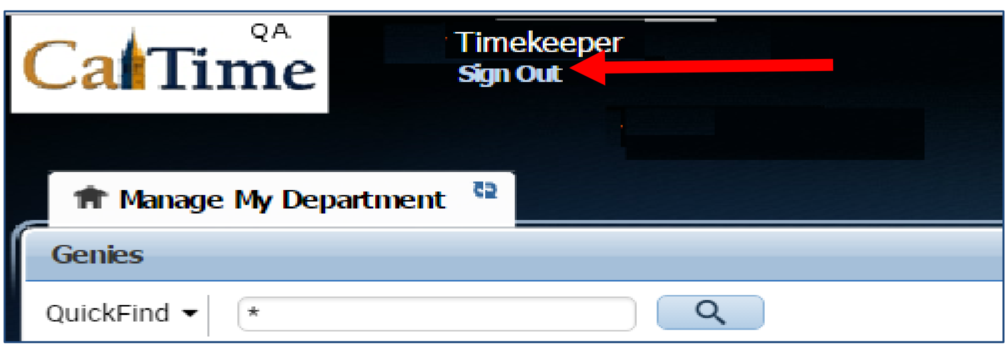
Using Internet Explorer, Google Chrome, Firefox, or Safari, to the CalTime website at [http://caltime.berkeley.edu/](http://caltime.berkeley.edu/). Click on the ACCESS button on the main page.




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

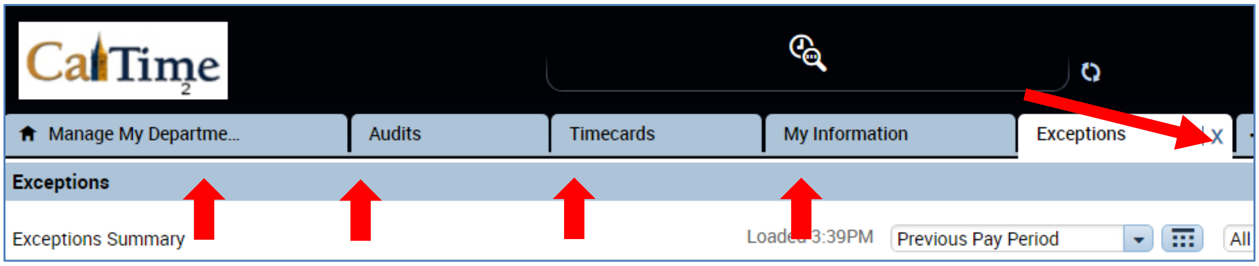



To Log out of CalTime, click on Sign Out at the top right of the CalTime webpage. Please properly log out when exiting CalTime and refrain from simply closing your webpage window.



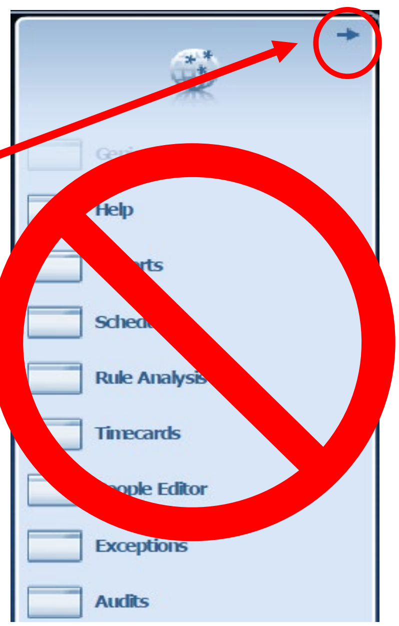

## Navigating in CalTime

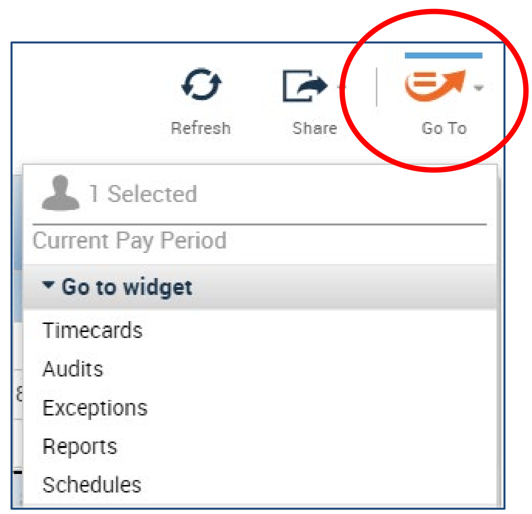
In CalTime, a few features are available enabling you to easily navigate between different tabs. For Example, You can move back and forth between different tabs such as “Manage My Department” and “Audits” by clicking on the tab at the top. To close the tab, click on the X symbol at the right of the Tab. The default tab that will appear each time you login to CalTime is **Manage My Department**.




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.

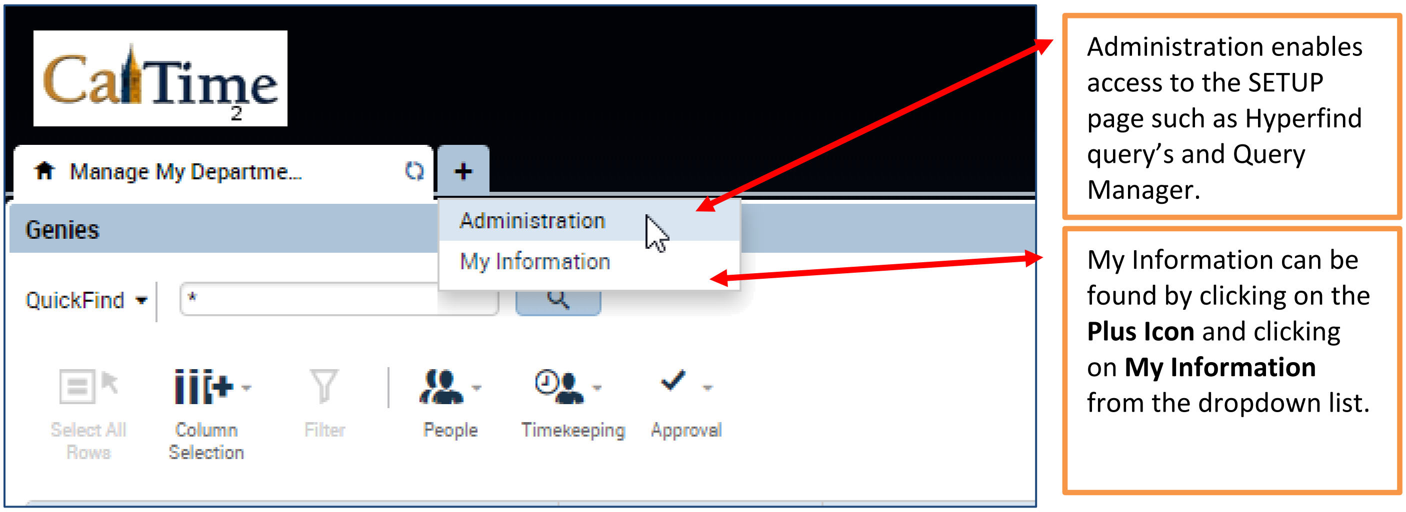
Since the blue panel is not available to timekeepers. **<u>You may minimize it by clicking on the blue arrow.</u>**



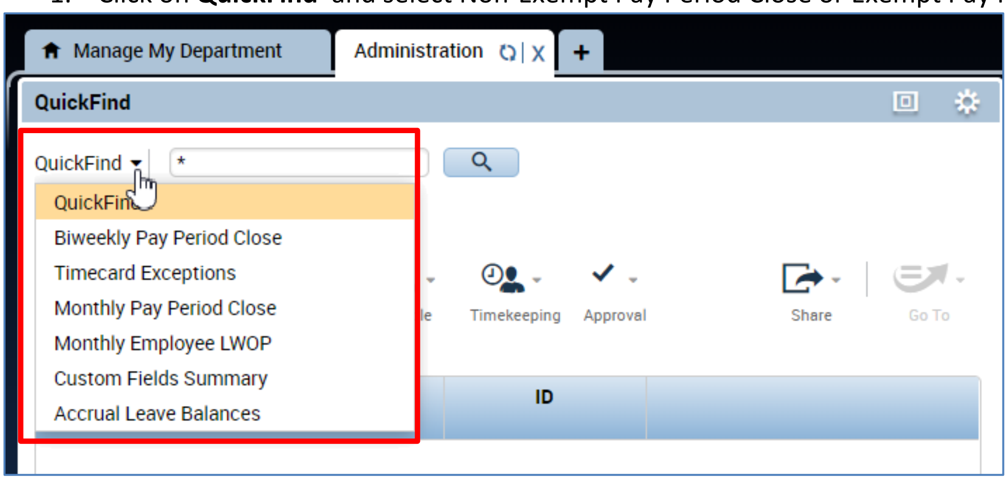
## DEFAULT HOME PAGE: MANAGEMENT MY DEPARTMENT AND SIGN-OFF

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 supervisor training materials. Via the Plus icon (next to management my department tab), you can click on the plus icon to access Administration and My information.

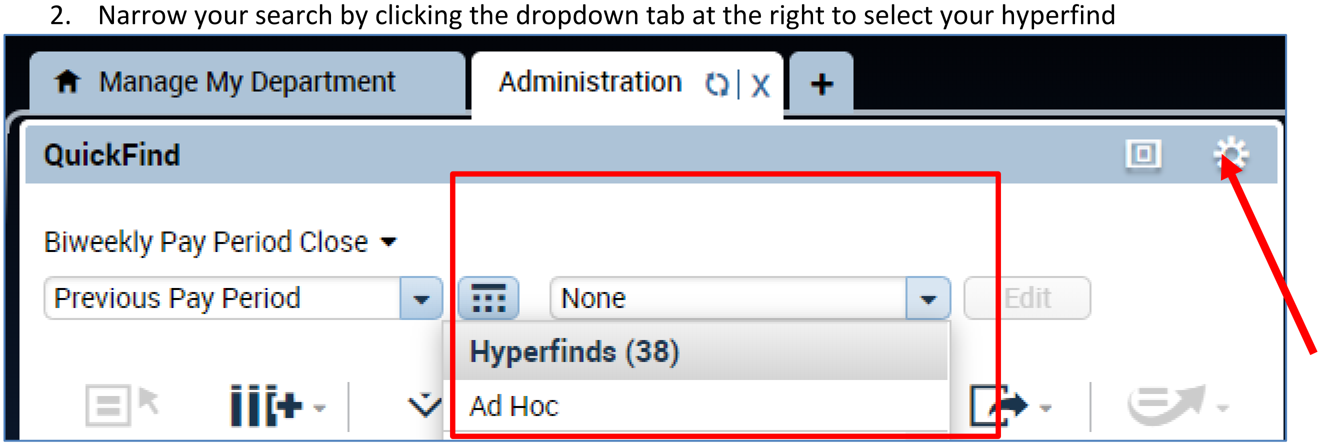



### Select employee population

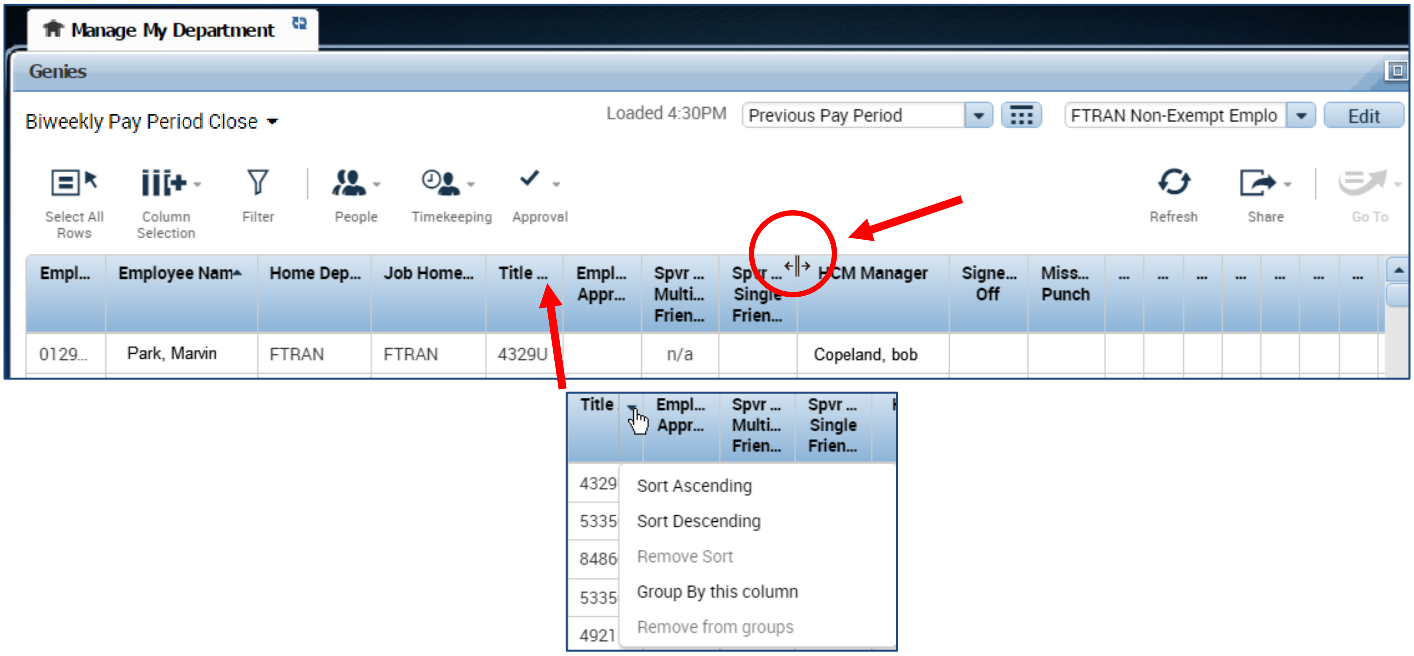
1. Click on **QuickFind** and select Non-Exempt Pay Period Close or Exempt Pay Period Close




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



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.

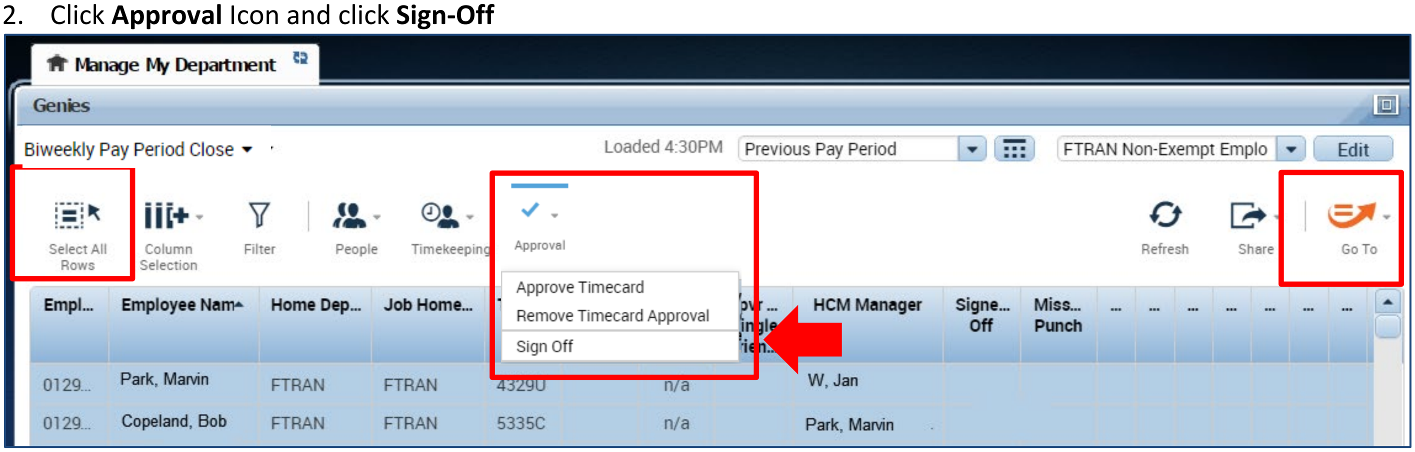



## Clear Exception Errors

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](http://caltime.berkeley.edu/training).

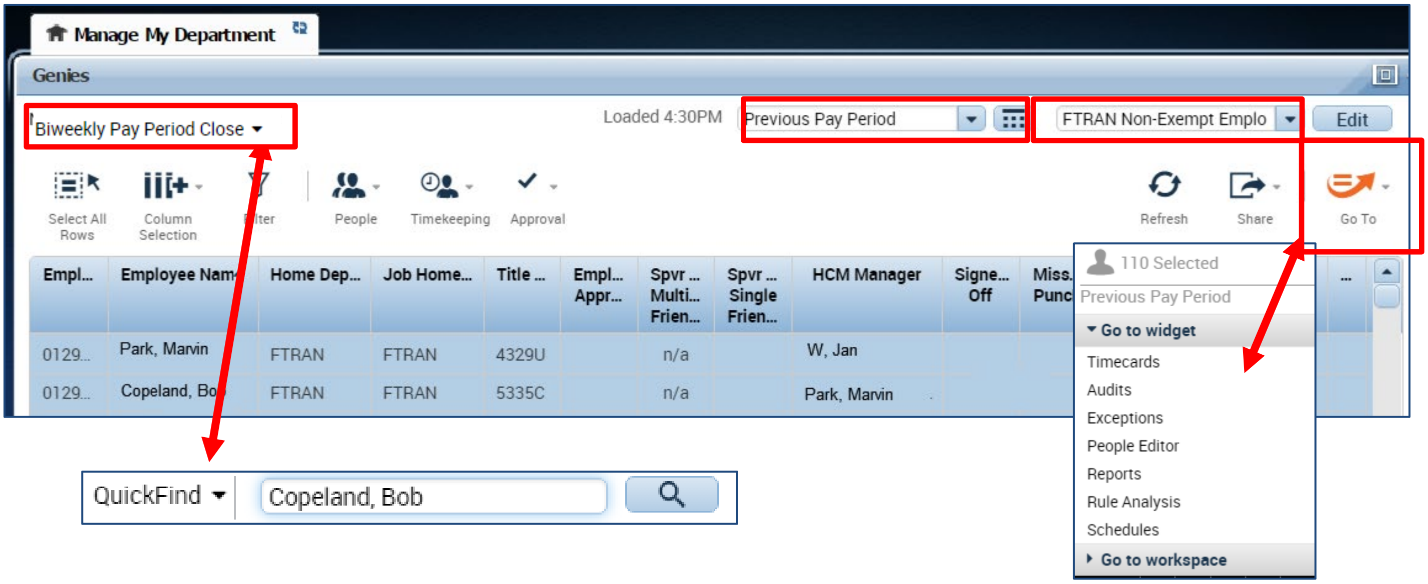
## Select Timecards for Sign-Off

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**




## Review Individual Timecards

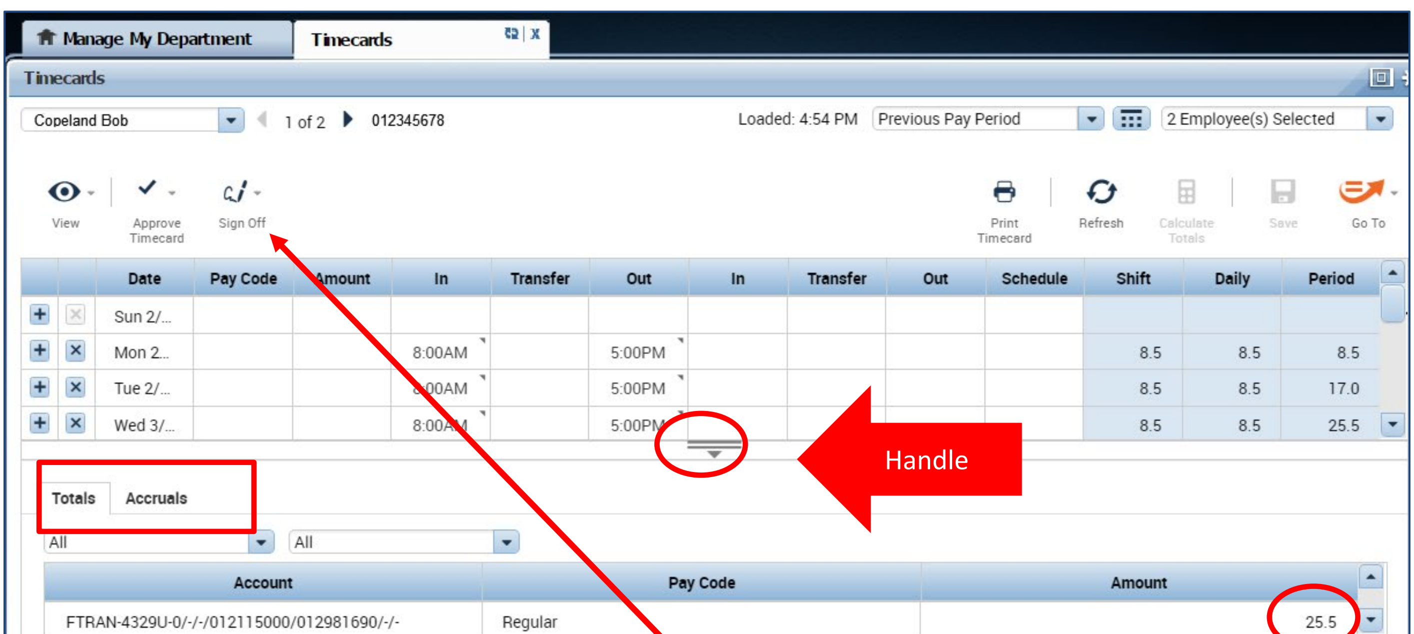
1. Select Genie at top left and hyperfind at the right (If you know the name or employee ID, you can simply click on the drop down arrow and type in the EID and last, first name in the **QuickFind** field)
2. Verify you are in the correct pay period
3. Click on employee from the list until highlighted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




## Review Timecards for Accuracy

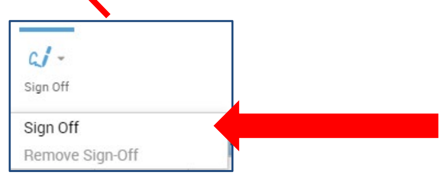
A **Timecards** new page will open enabling you to review each employee's timecard in detail and easily scroll to the next employee.

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

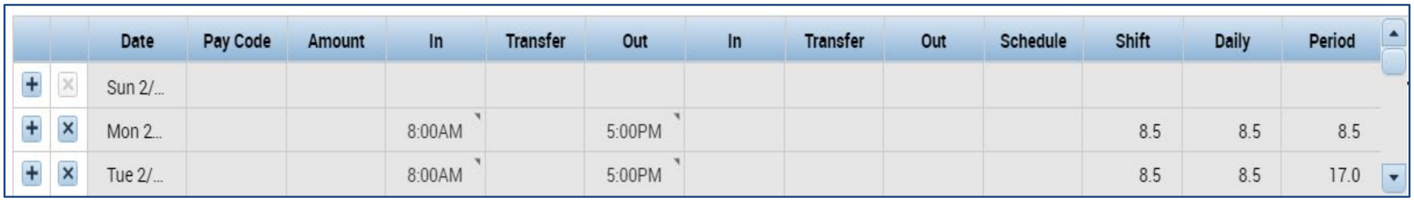



## To Add or Remove Sign Off on individual Timecard

1. Click on Sign-off Icon and click Sign-Off

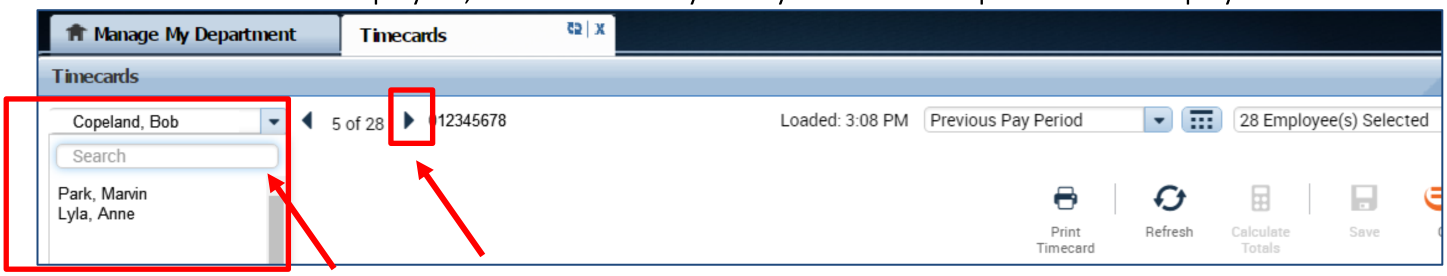


2. Once Sign-Off is added, the timecard will change colors (Grey)




## Scroll to Next Employee and Repeat Sign Off Process

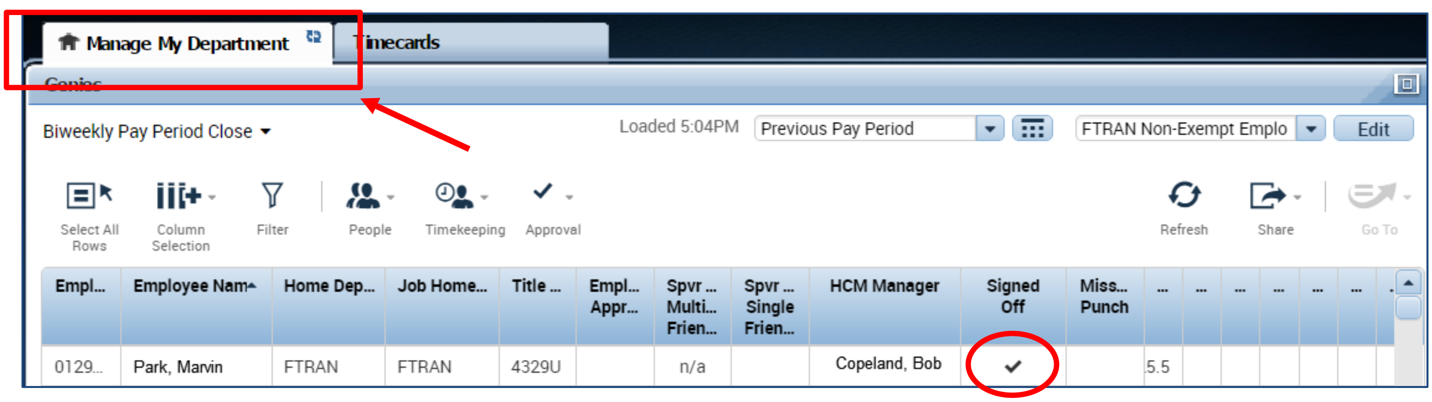
1. To view the next employees, click on Arrow or you may click on the drop down list of employees.




## 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




**<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).

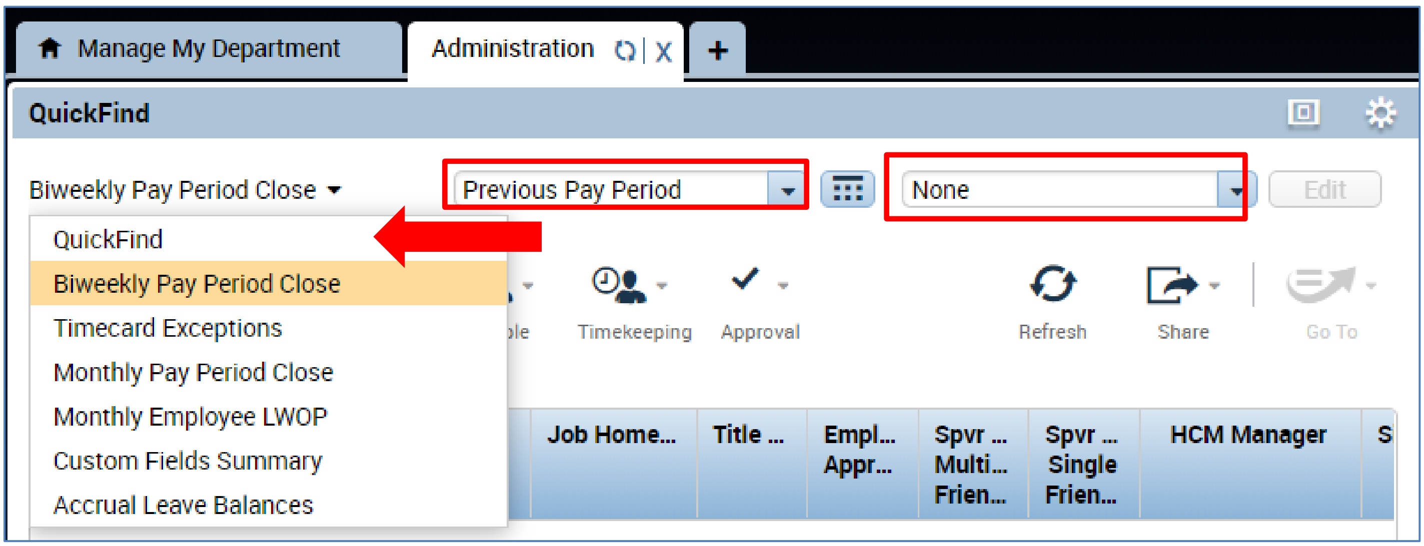
**<u>Supervisor Approval Single Friendly Name:</u> Reserved for employees with one friendly name**
It will display the number "**1**" for each employee who has been approved by a supervisor. (It might have the number "**2**" if it has also been approved by a delegate.)
A **blank space** means no supervisor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

## BIWEEKLY PAY PERIOD SIGN-OFF

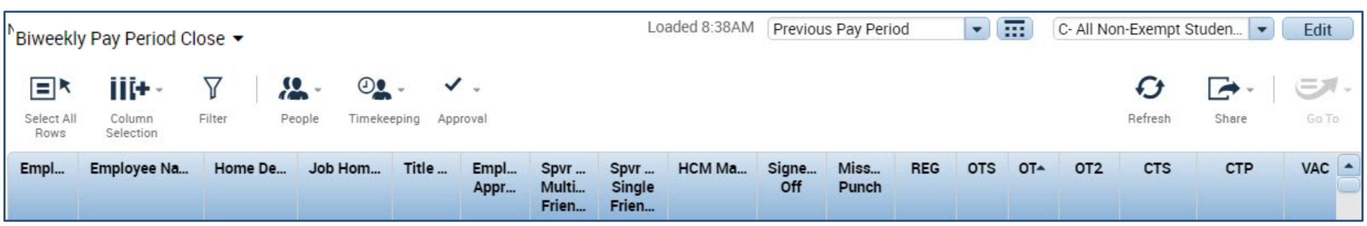
After employees and supervisors have approved timecards following the close of a biweekly pay cycle, timekeepers are responsible for Signing Off on the CalTime timecards. The deadlines for Timekeeper sign-off can be found at http://caltime.berkeley.edu/training/caltime-training-timekeepers. Sign-Off 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




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

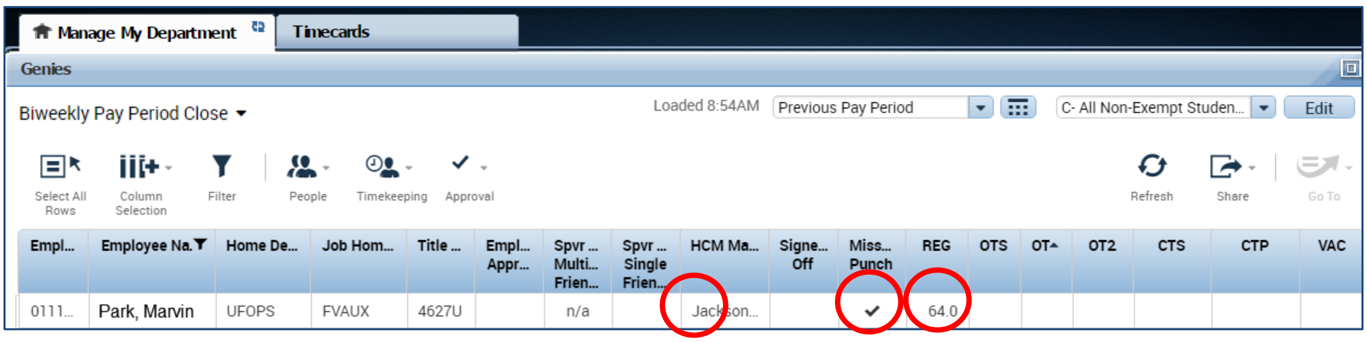



**Employee Number:** Unique Ten digit number represented the employees ID number
**Employee Name:** Last Name, First name
**Home Department:** Five Alpha letter code representing employees department
**Title Code:** Four digit code representing employee's job
**Employee Approval:** A check mark in the 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.

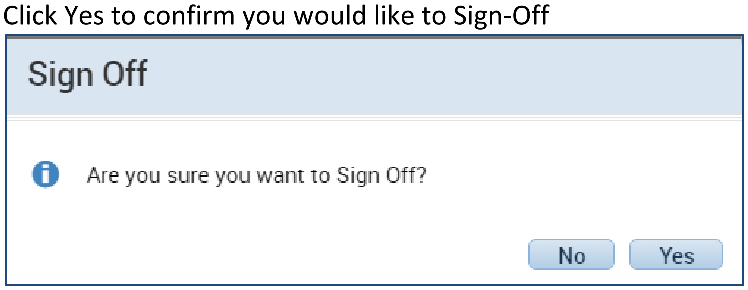
## Review the Timecard Data

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.



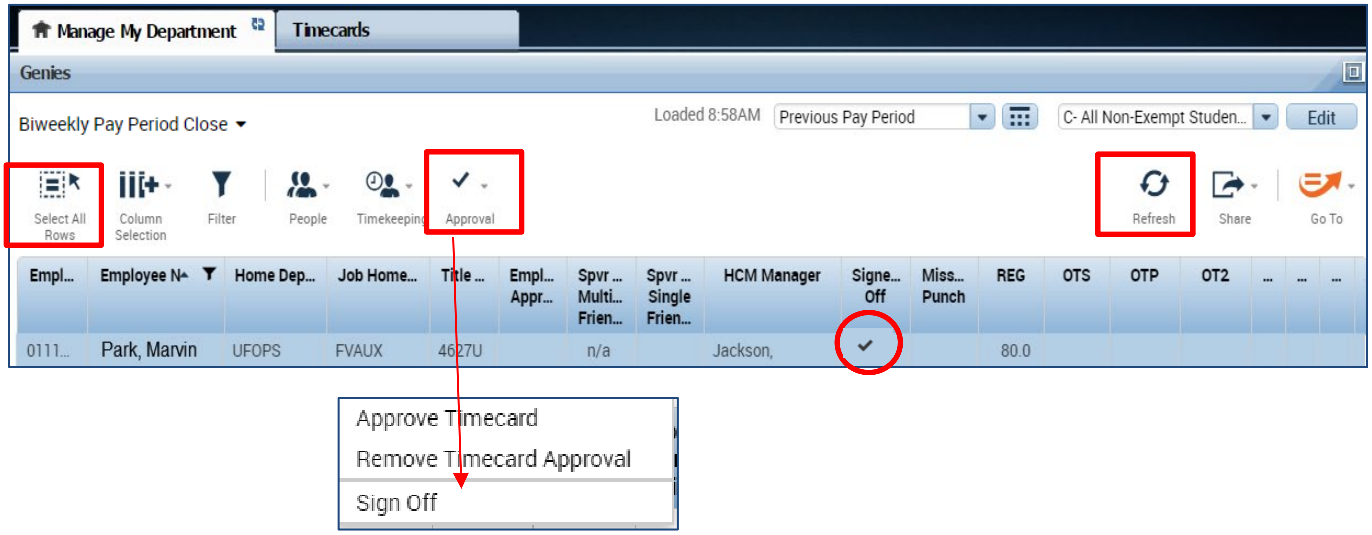

## Sign-Off on Timecards

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.

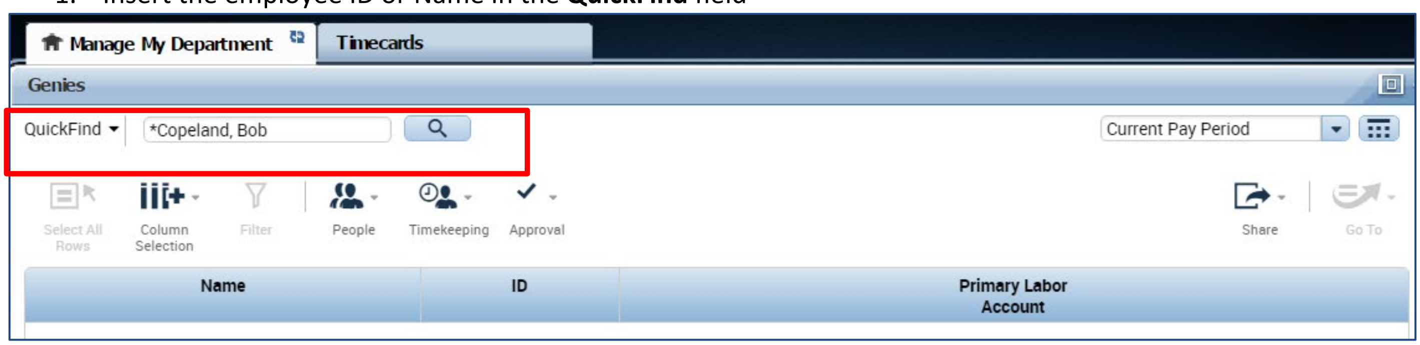
Note: Timekeepers must sign off even if the supervisor has not approved the timesheets. Any time or leave on the timecards will pass to PPS regardless of missing approvals.



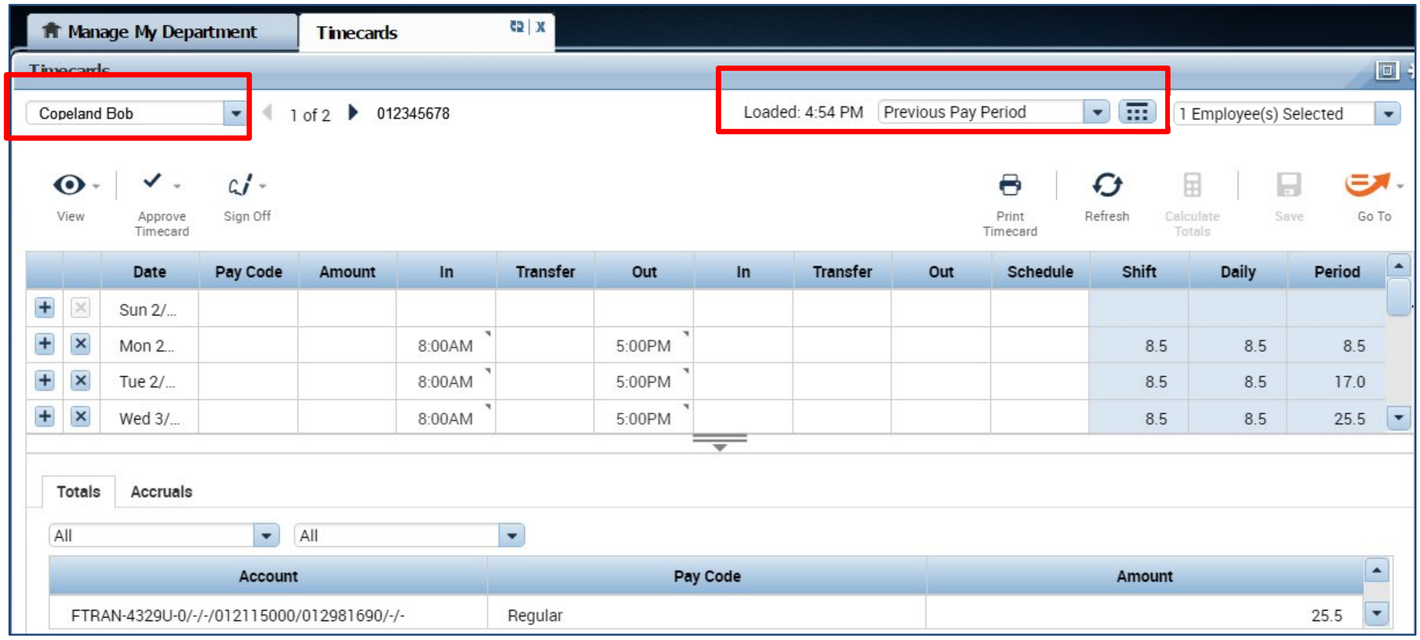

## HOW TO VIEW INDIVIDUAL TIMECARDS

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:

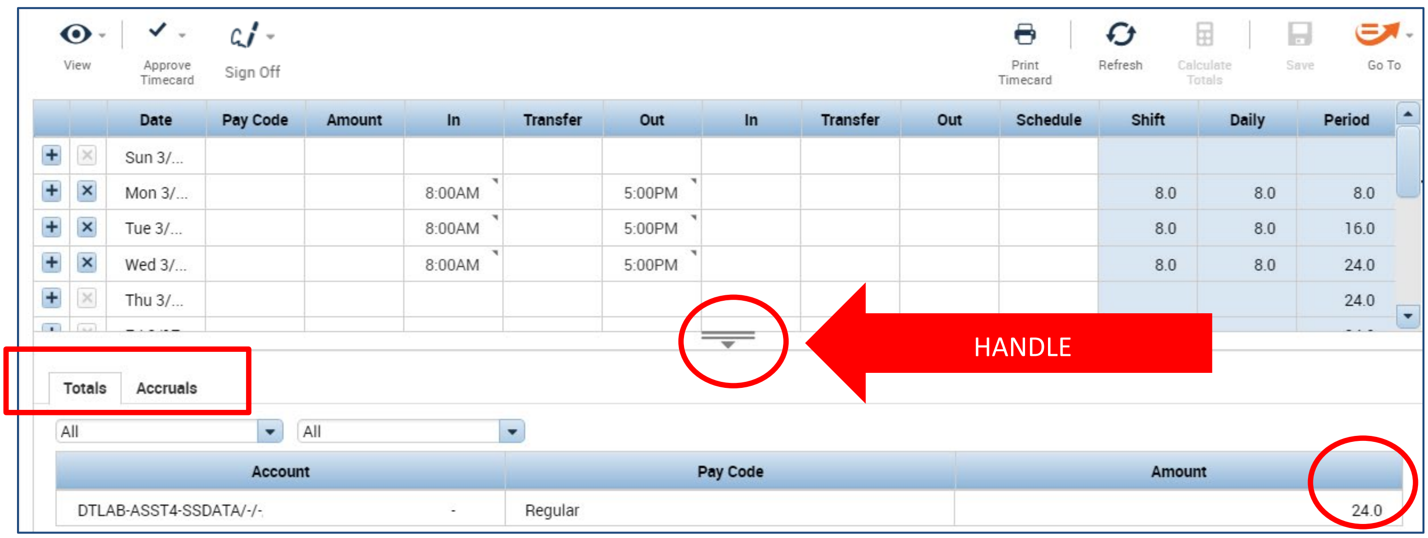
1. Insert the employee ID or Name in the **QuickFind** field




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.

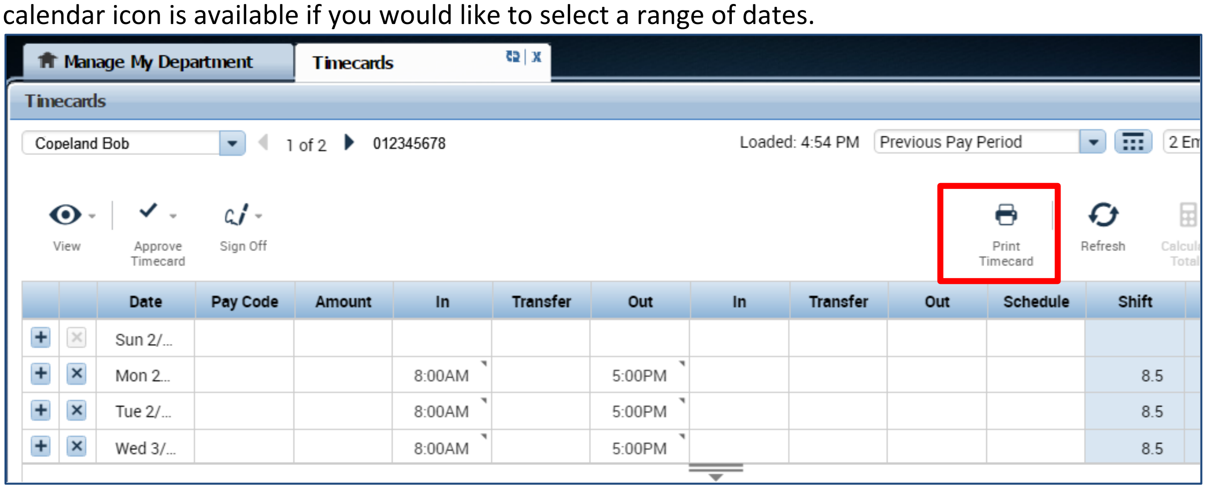



3. To view the employees Timecard Totals and Accruals. Click on the handle that appears at the bottom of the timecard




## 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.



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

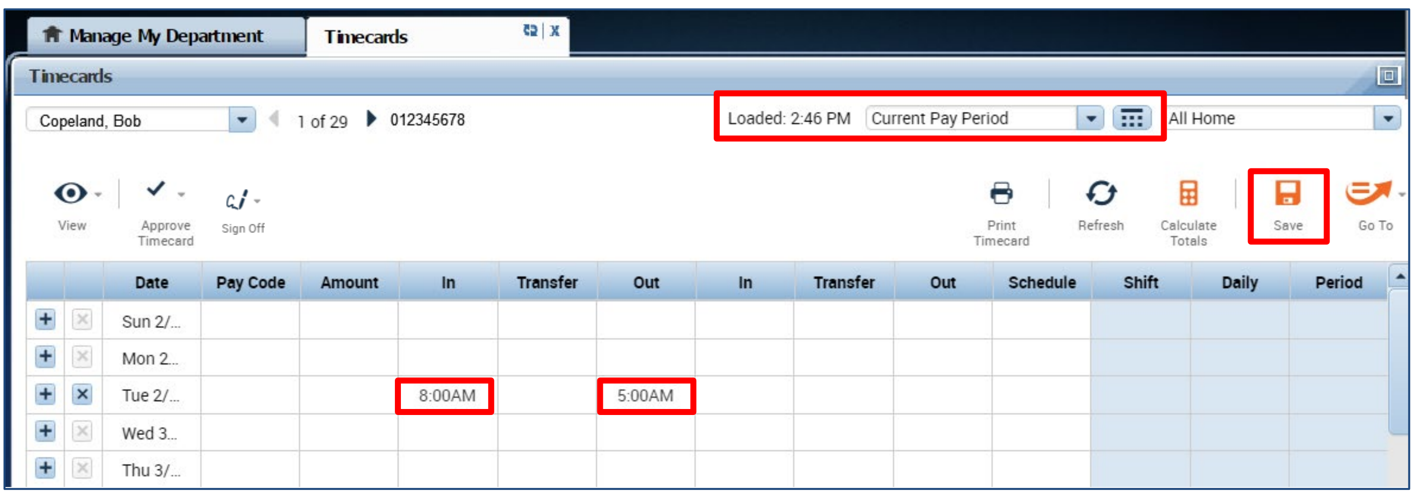
| Non-exempt, Employee | | 133133133 | | | | Current Pay Period | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Date** | **Pay Code** | **Amount** | **In** | **Transfer** | **Out** | **In** | **Transfer** | **Out** | **Schedule** | **Shift** | **Daily** | **Period** |
| Sun 2/26 | | | | | | | | | | | | |
| 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

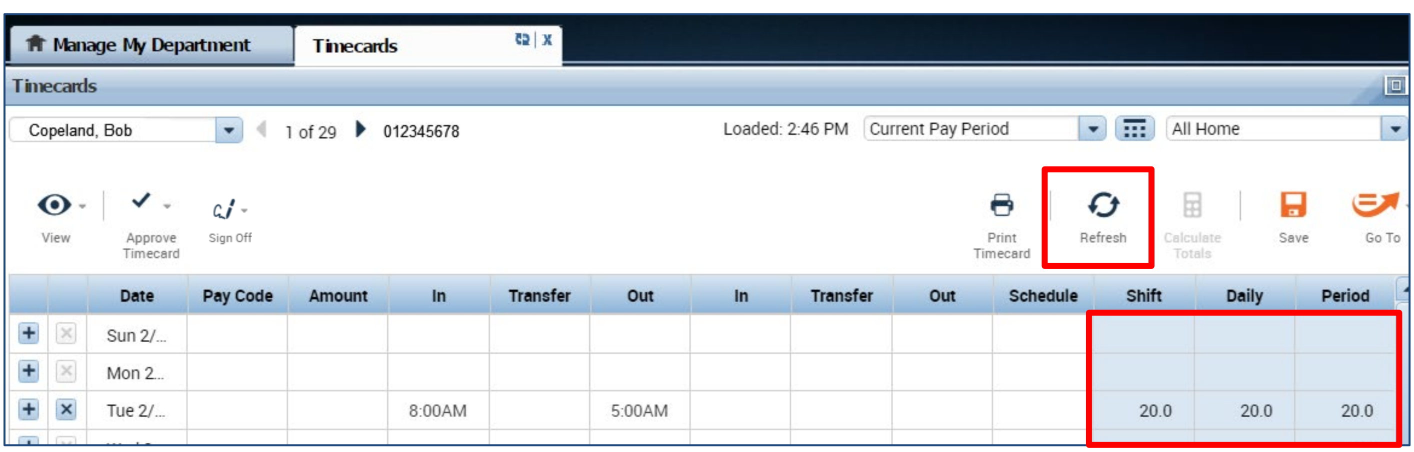
## Editing Employees Time

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.



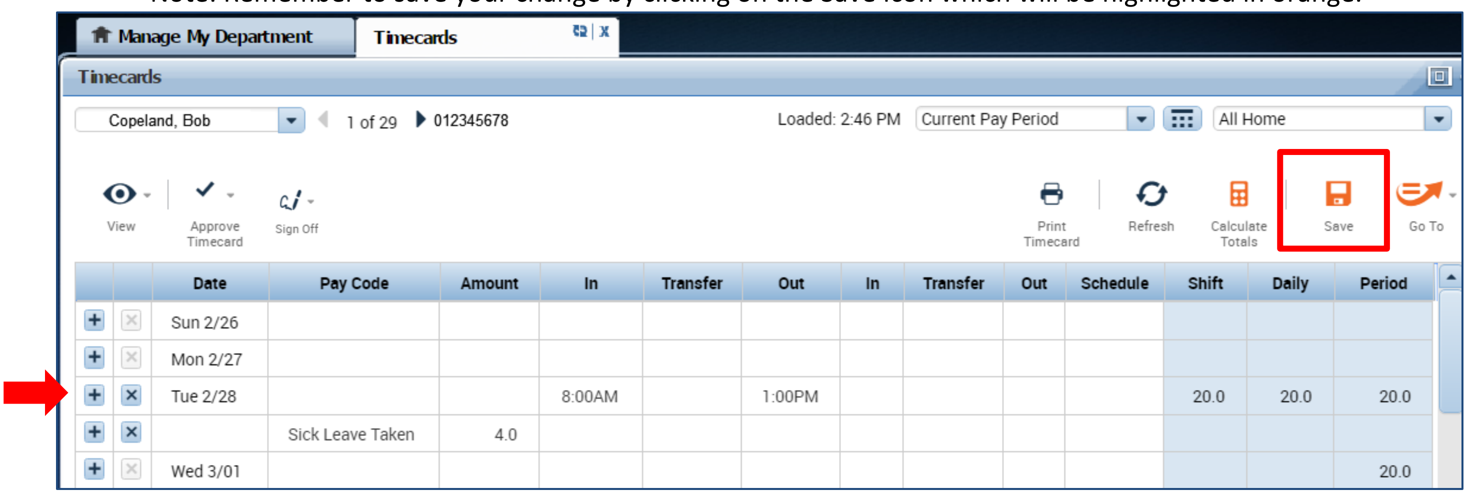
## Adding and Removing Timecard Rows for Multiple Entries in a Day

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)

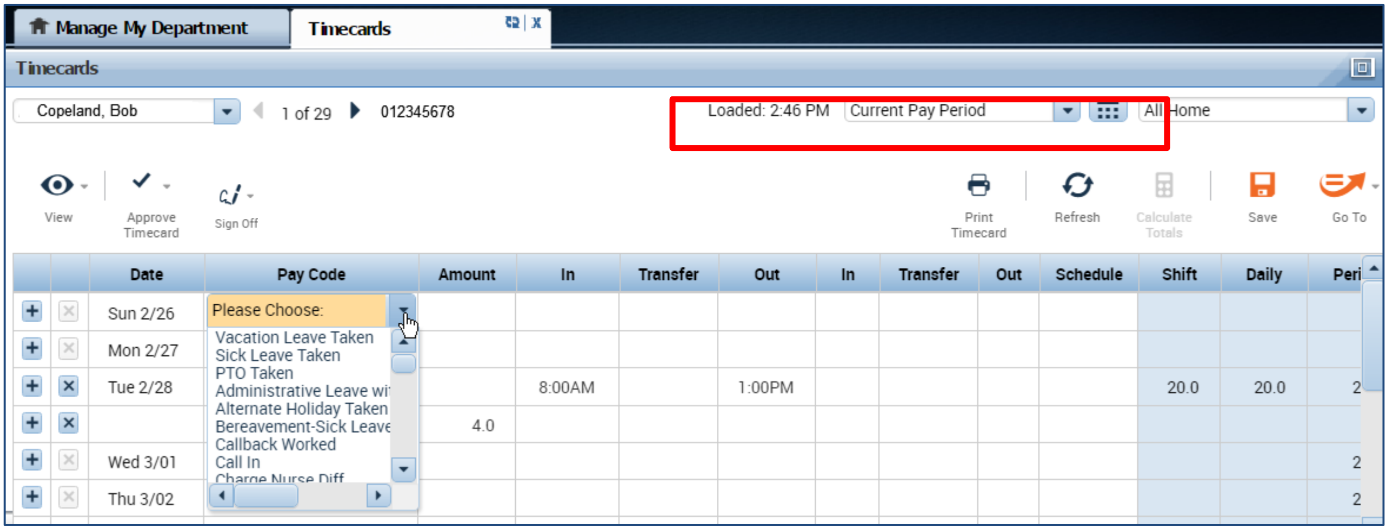
1. **TO ADD A ROW** Click the Plus symbol and this will open a new row for the same day.
   *In the Example below, the employee worked 8am-12pm and took an hour for lunch. After lunch they went home sick for the rest of the day. To add the sick time, they added a row to their timecard for that same day 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.

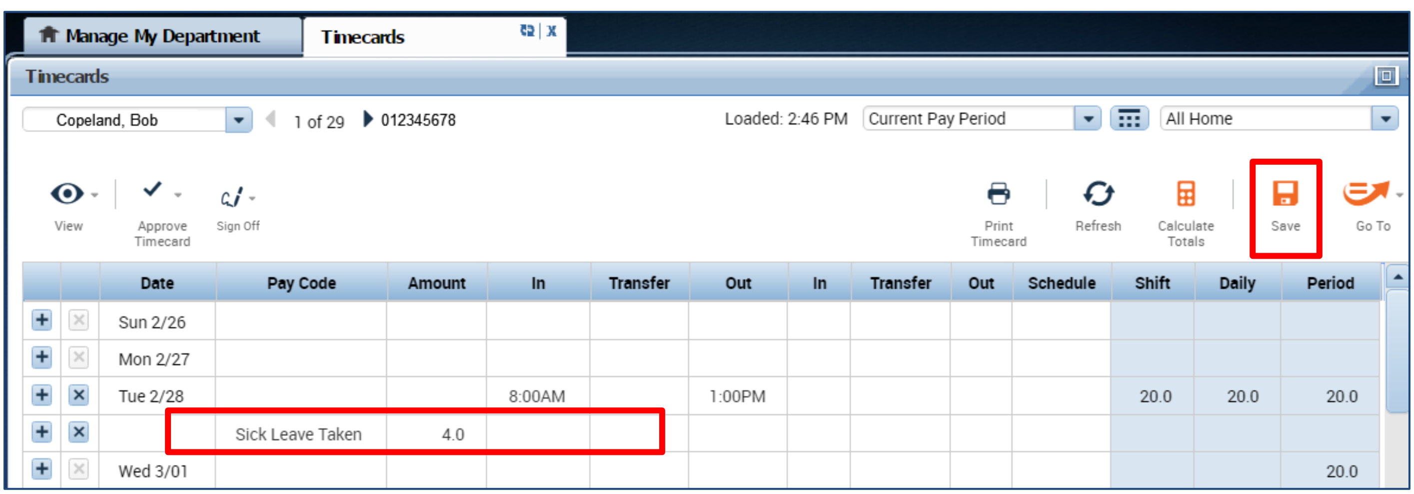



5. Record Hours

**Acceptable Formats for Entering Pay Code Amounts**

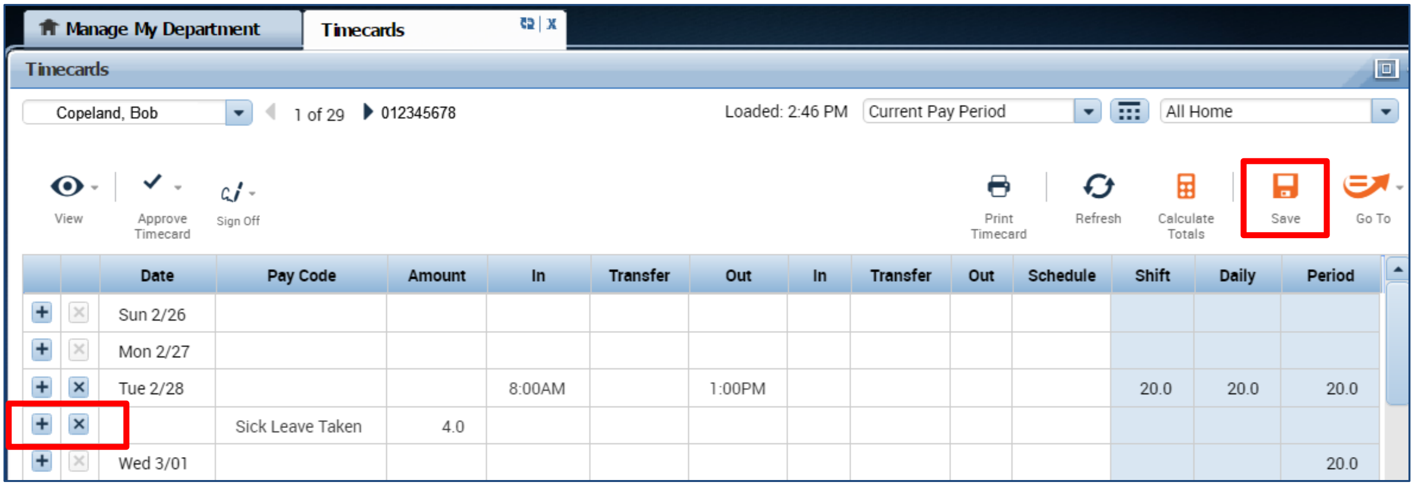
| Acceptable Format | Example | Interpretation by CalTime |
|---|---|---|
| Leading zeros (optional) | 07 | 7 hours |
| | 08:30 (8 hours, 30 minutes) | 8.5 hours |
| Colon | 7:30 | 7.5 hours |
| Decimal | 8.5 | 8.5 hours |

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

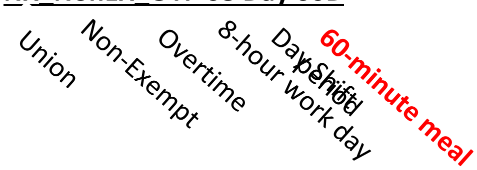
Employees do not need to clock in and out for lunch. CalTime is set up to automatically to deduct 30 or 60 minutes for lunch after 5 hours of work. The automatic lunch deduction is based on the employees pay rule assignment. If you wish to change the automatic lunch deduction, you can perform a work 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 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

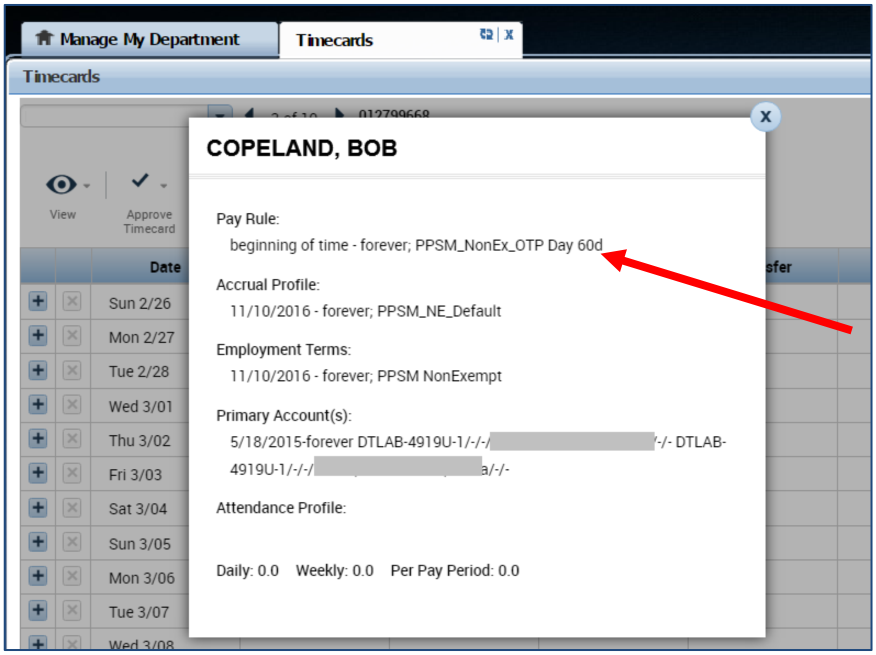
(For example, changing the employee from a 60 minute lunch to a 30 minute lunch)

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 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.

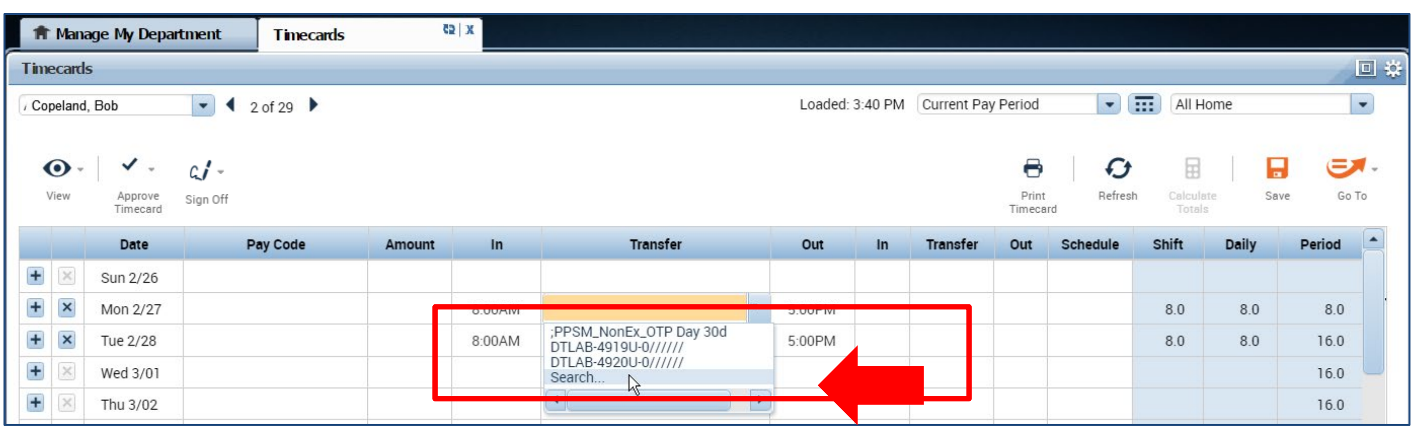



2. A new window will appear, showing detailed information about the employee. The Pay rule information will appear at the top.
   The example screen shot above shows the employee has a pay rule of **PPSM_NonEx_OTP_ Day 60d**
   PPSM (unrepresented) and NonEx (non-exempt) OTP (overtime eligible), and **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

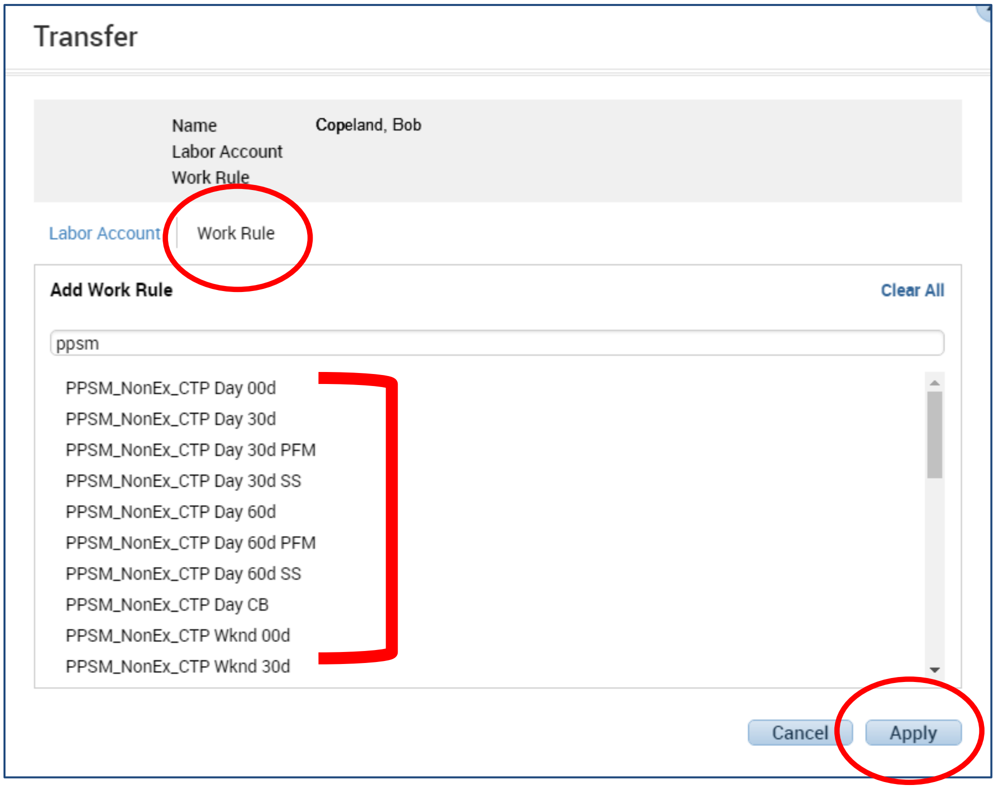
A work rule transfer should be applied when there is a temporary change in an employee's standard work rule for a specific shift.

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.



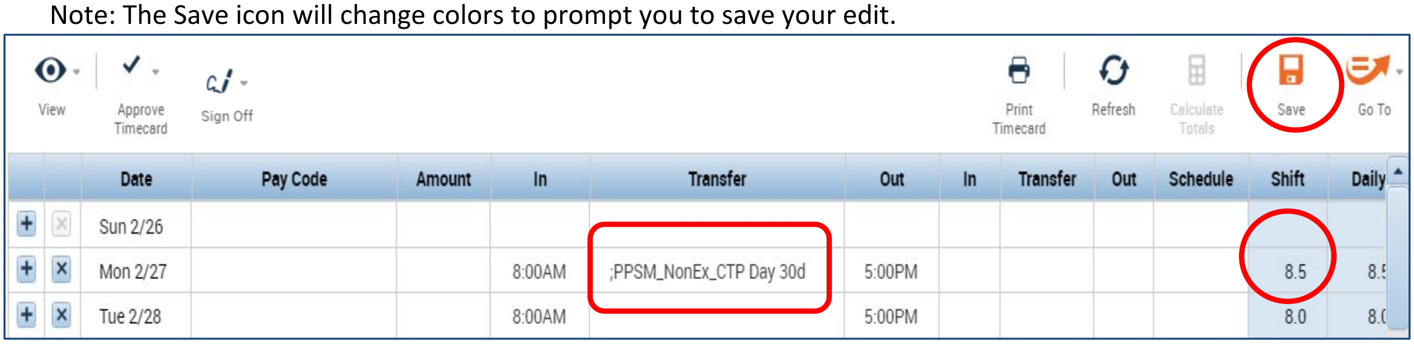

3. Click on **Work Rule**. A complete list of Work rule options available to you will appear. Select applicable work rule.

4. Click **Apply**



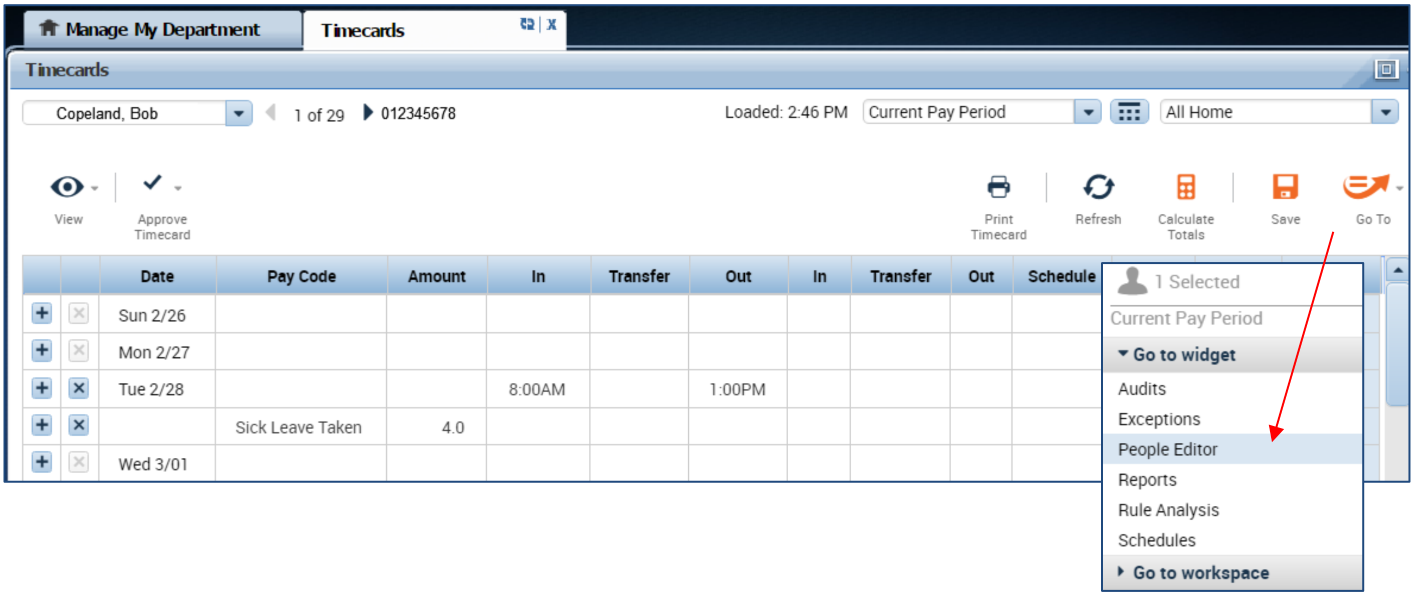

5. Once you have clicked apply, the pay rule will populate on the timecard and you can click on calculate totals to see that the employees 60 minute lunch was reduced to 30 minutes and they are now showing 8.5 hours in the work day instead of 8 hours.
6. Then click on the "**Save**" button.

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

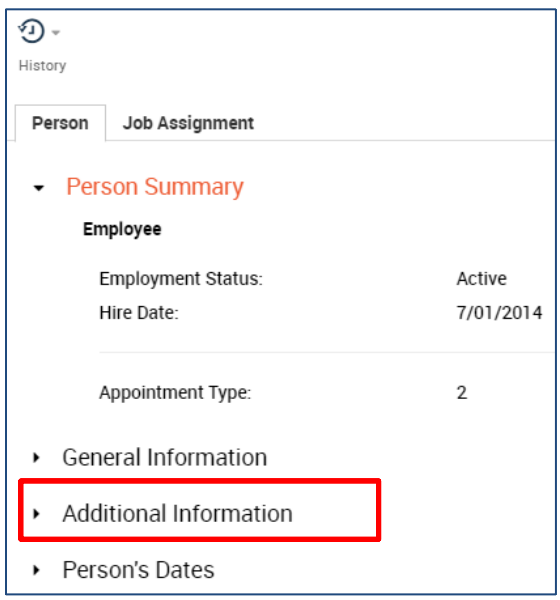


## Permanent Pay rule change to additional fields

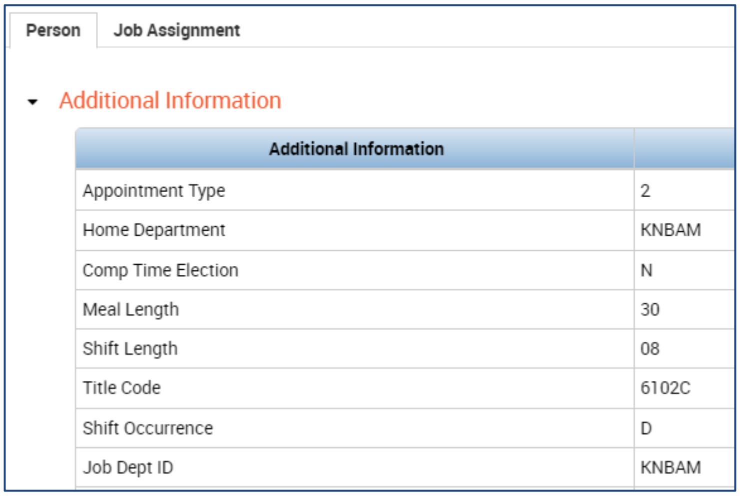
1. Open the employees timecard
2. Click on Go To icon and select People Editor (a people editor tab will open)




3. Click on Additional Information



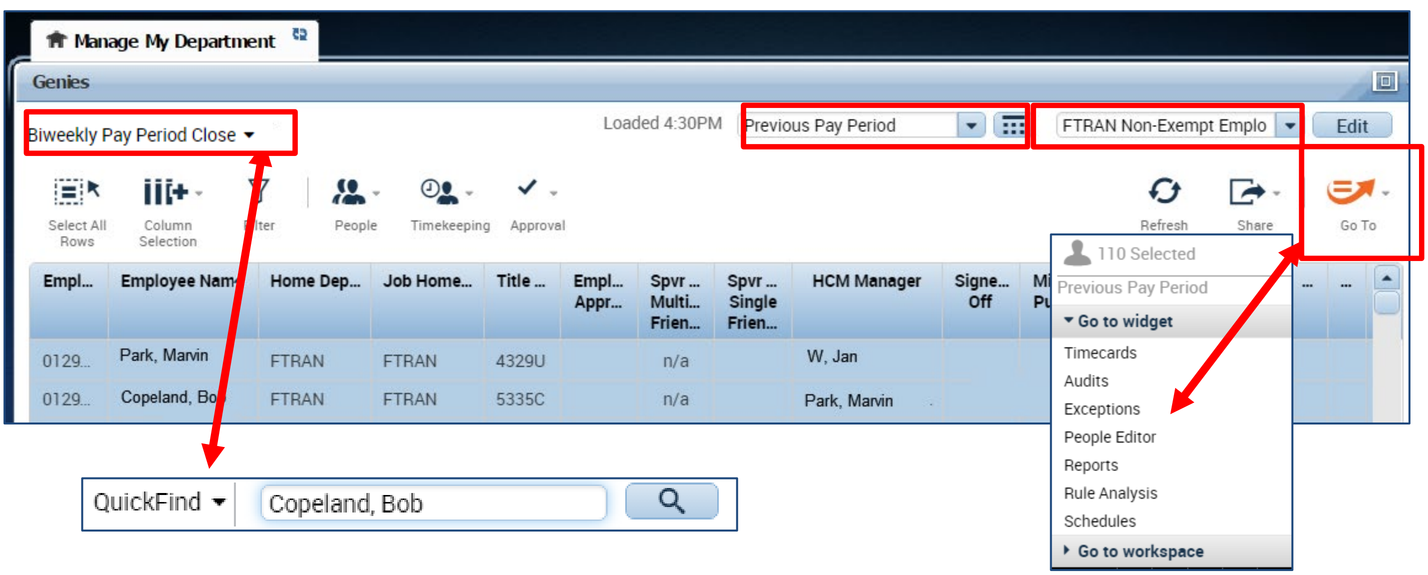
4. Click on field to the right and insert modified information. For example, If you are permanently changing an employee from a 30 lunch to a 60 minute lunch, you would type in 60 in the column next to Meal Length.



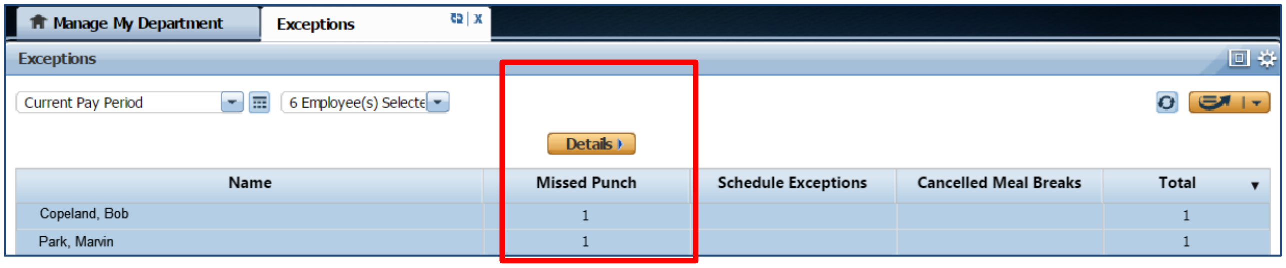

## Clearing exceptions (i.e. Missed Punches)

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.

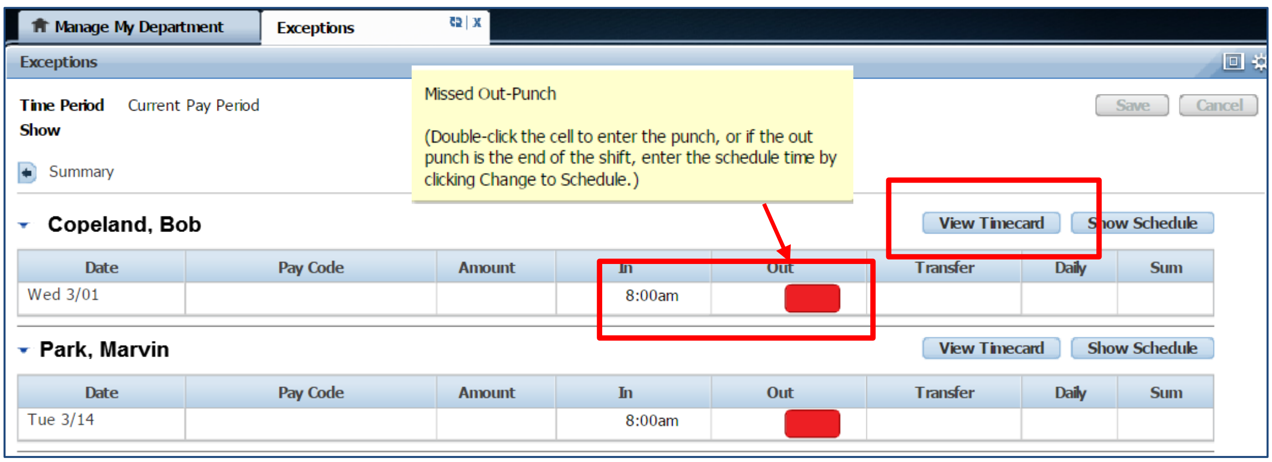
1. To access errors from the Manage My Department (Default tab), select the applicable genie (at the top left) by clicking the drop down arrow or insert the name or employee id in the quickfind field.
2. Click on the applicable pay period and the select the hyperfind at the top right.
3. Click on the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




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.



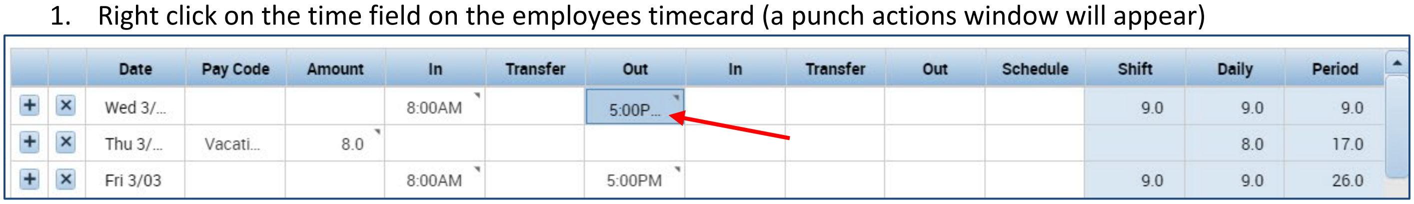

5. The employees missed punch will appear. You simply correct the error here (i.e. enter the missed punch time) or if you would like to look at the employees timecard, you can click on View timecard and correct the error on the employees timecard. If you click on view timecard a new tab will open so 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.



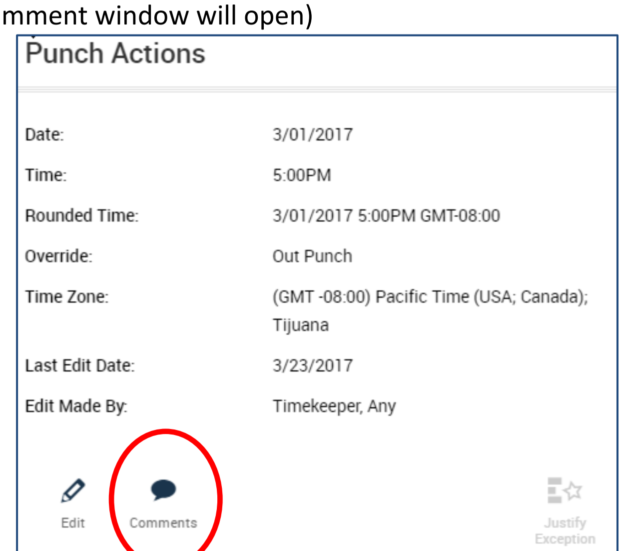

## Adding Comments

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

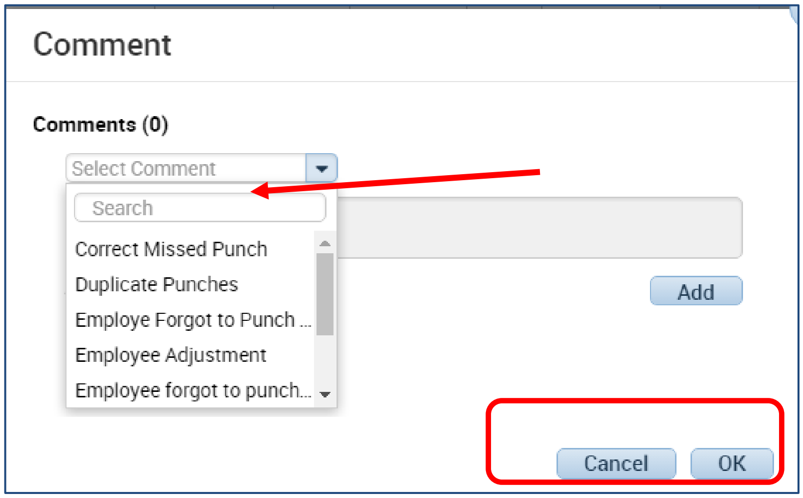
1. Right click on the time field on the employees timecard (a punch actions window will appear)




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.



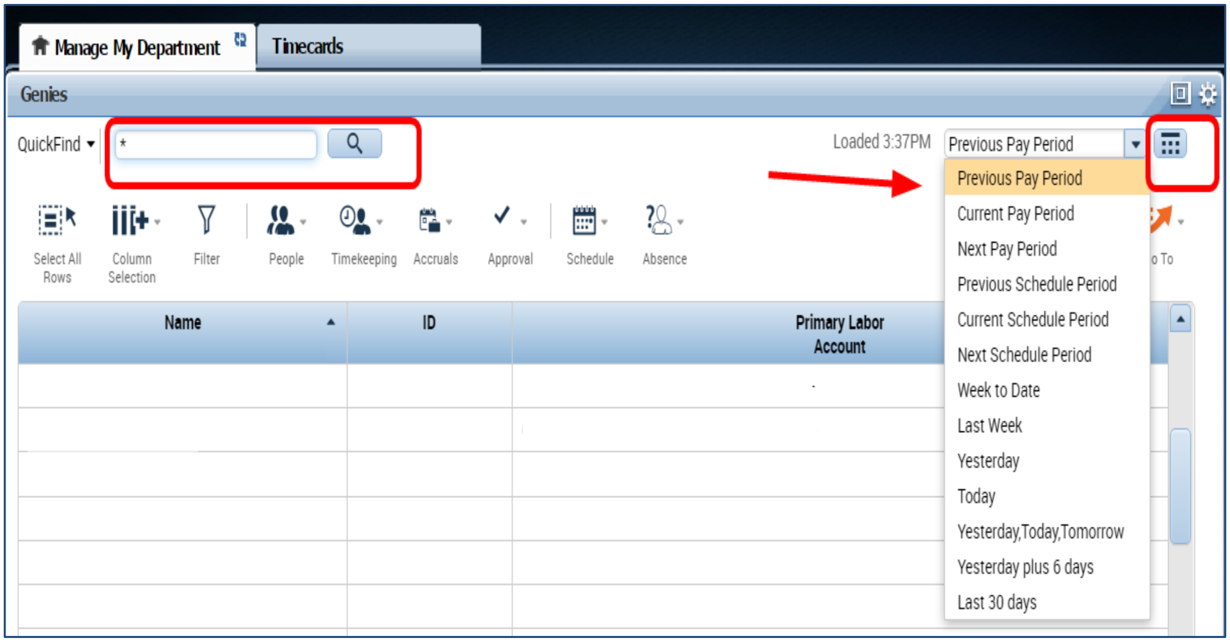

4. A little comment picture will appear next to the time to convey a comment has been added.


## 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 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:

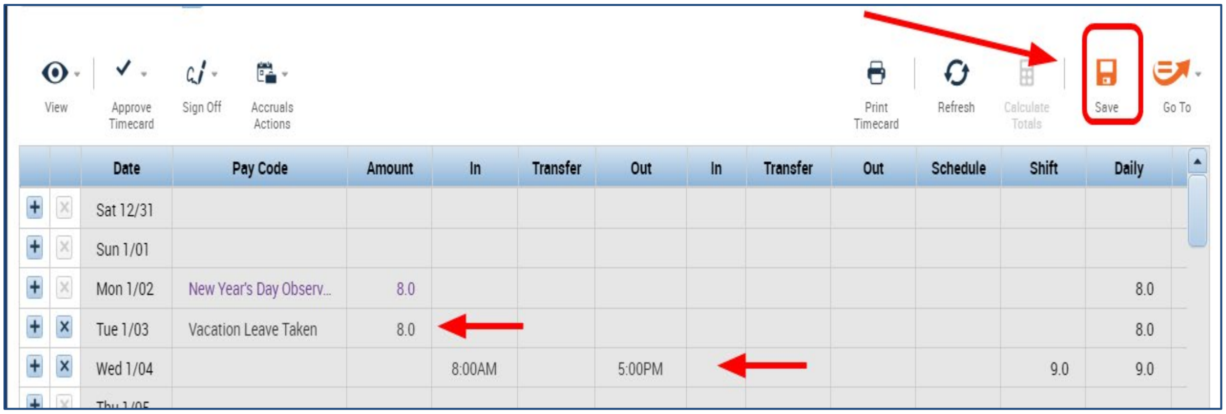
- Leave that was not recorded or recorded in error
- Time entry that required a work rule transfer (by the supervisor) to properly account for overtime, shift differential, etc.
- Missed time entry or incorrect hours
- Time entry assigned to the wrong job (for employees with multiple jobs)

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.

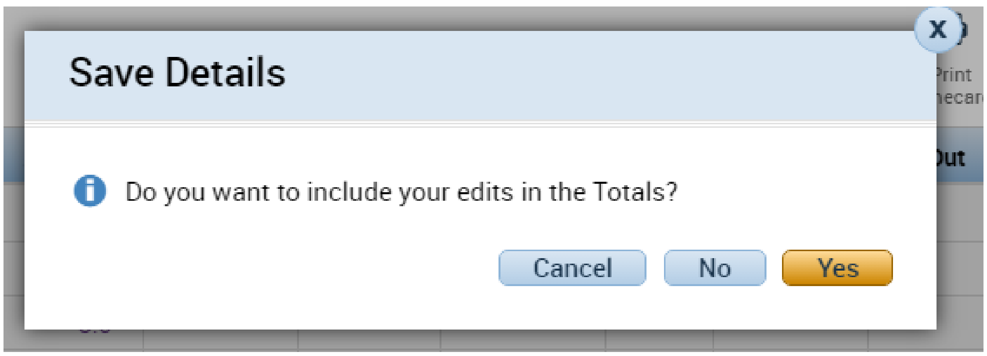



3. A signed-off timecard will appear in grey


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.

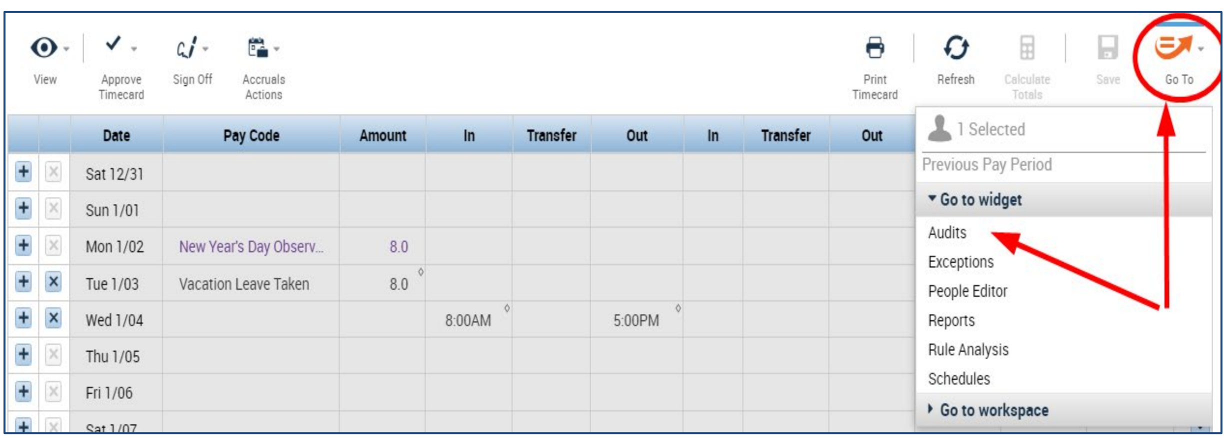



7. A window will open with Save Details. **"Do you want to include your edits in Totals."** If you click yes, then CalTime will send the time to the Payroll system (PPS). If you click No, CalTime will not send the time to Payroll and you will need to manually enter the time in the payroll system.

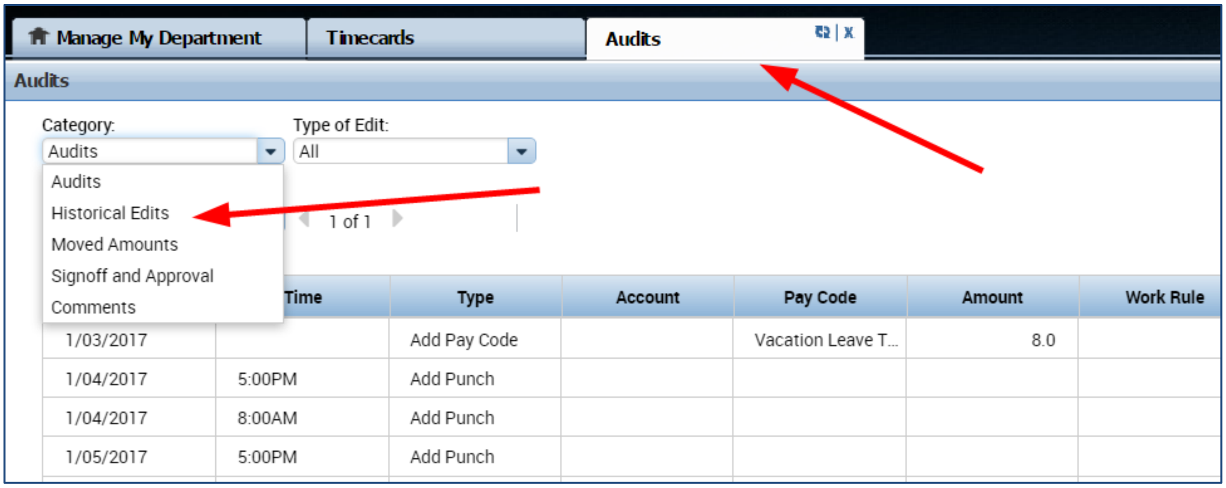



## Verifying Changes in the Audit Tab

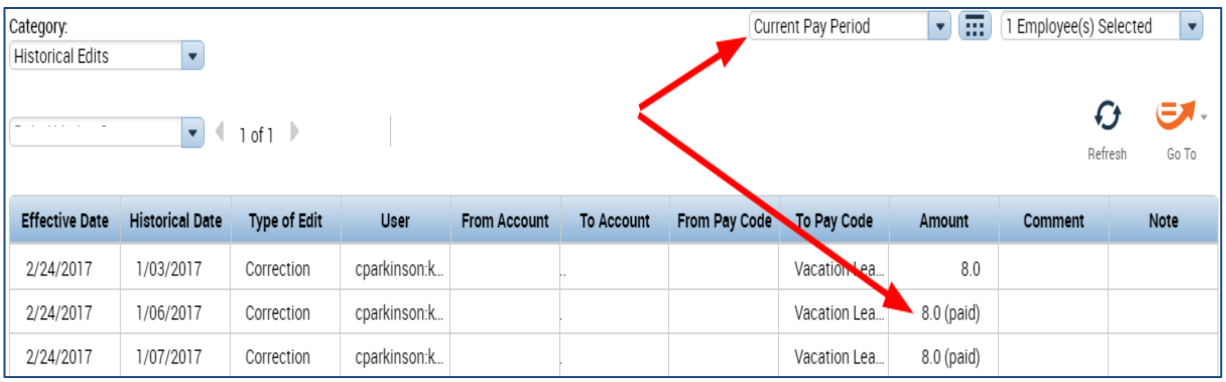
8. After clicking Yes or No, you can view your change in the audit tab. Click **Go To** icon, and click on **Audits**.




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

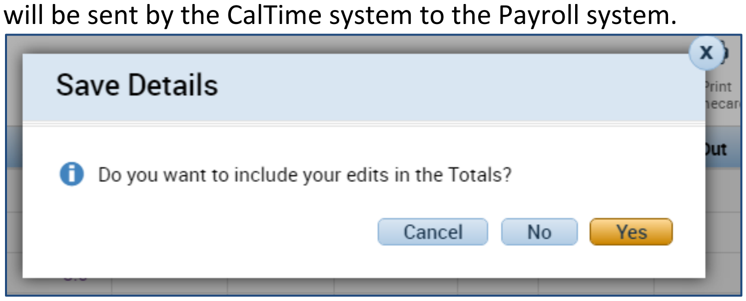



10. Click on **Current pay period** because historical edits appear in the current pay period audit trail (If you clicked no to **include your edits in Totals**, the historical edit was not sent to payroll and will appear as PAID as shown on the right, see step 7, pg. 2).

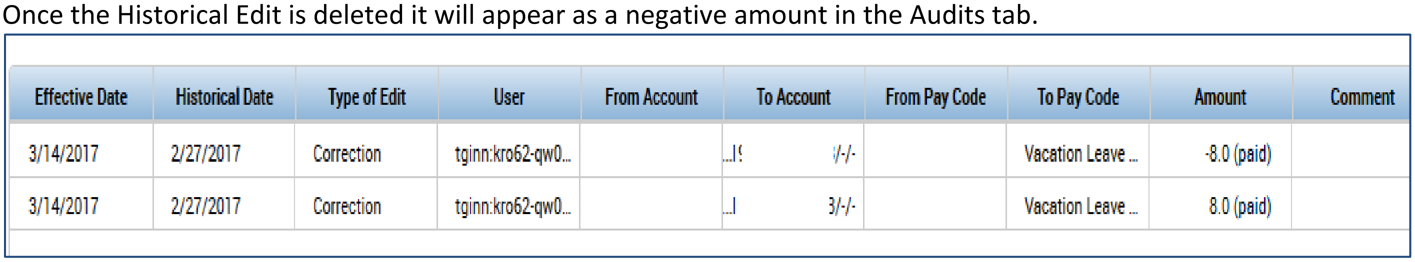



## To Remove a Historical Edit

1. 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.

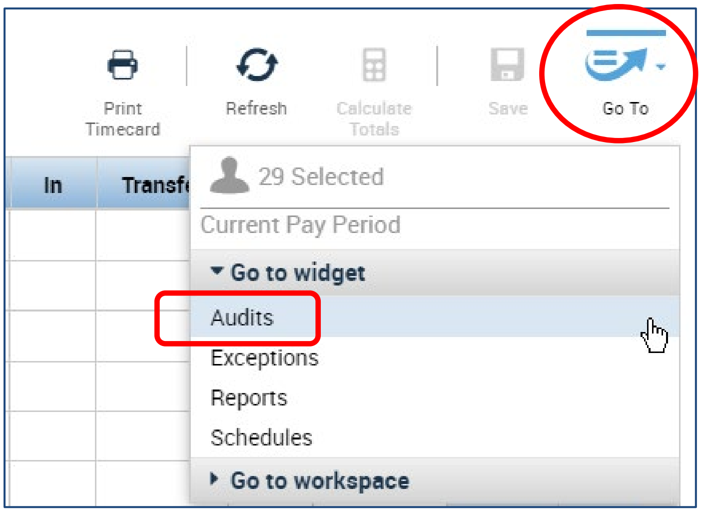



2. Once the Historical Edit is deleted it will appear as a negative amount in the Audits tab.

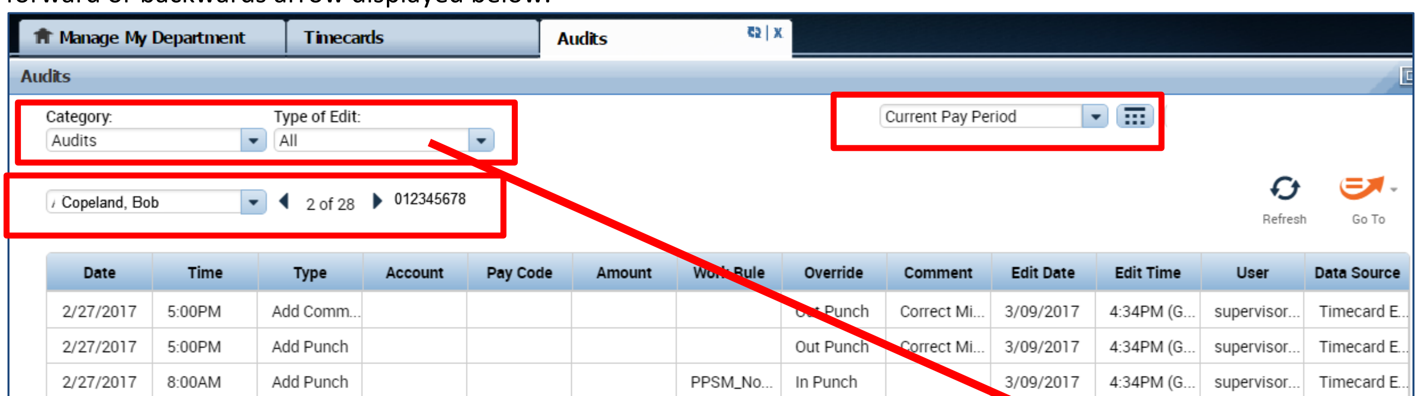


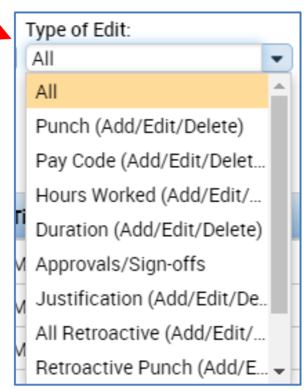
## AUDITS

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**.



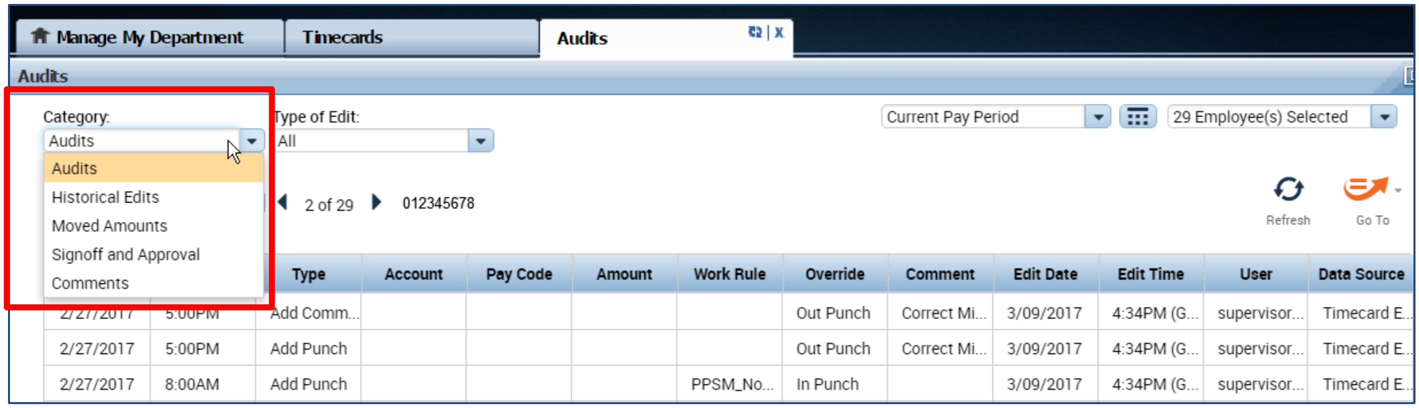

The screen will default to the current pay period and a list of any edits made to the employees timecard. You can select different employees by clicking on the employees name field or scroll through employees by clicking on the forward or backwards arrow displayed below.




**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.

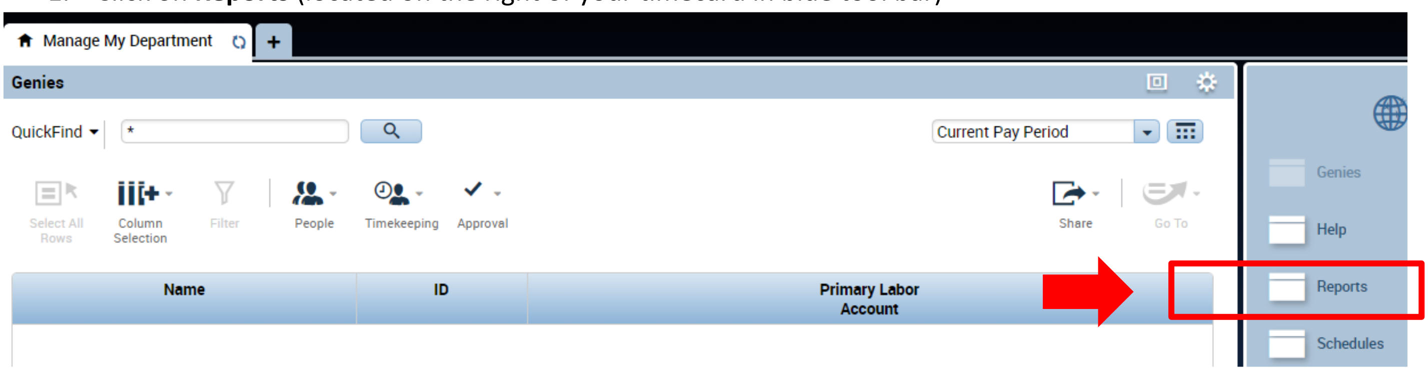



# CALTIME REPORTS

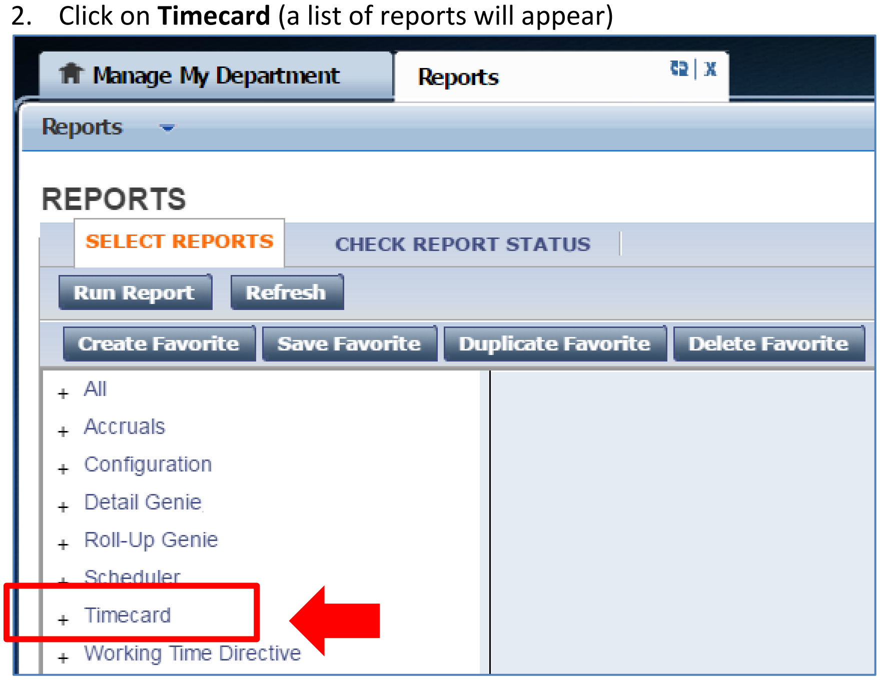
## Time Detail Report

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).

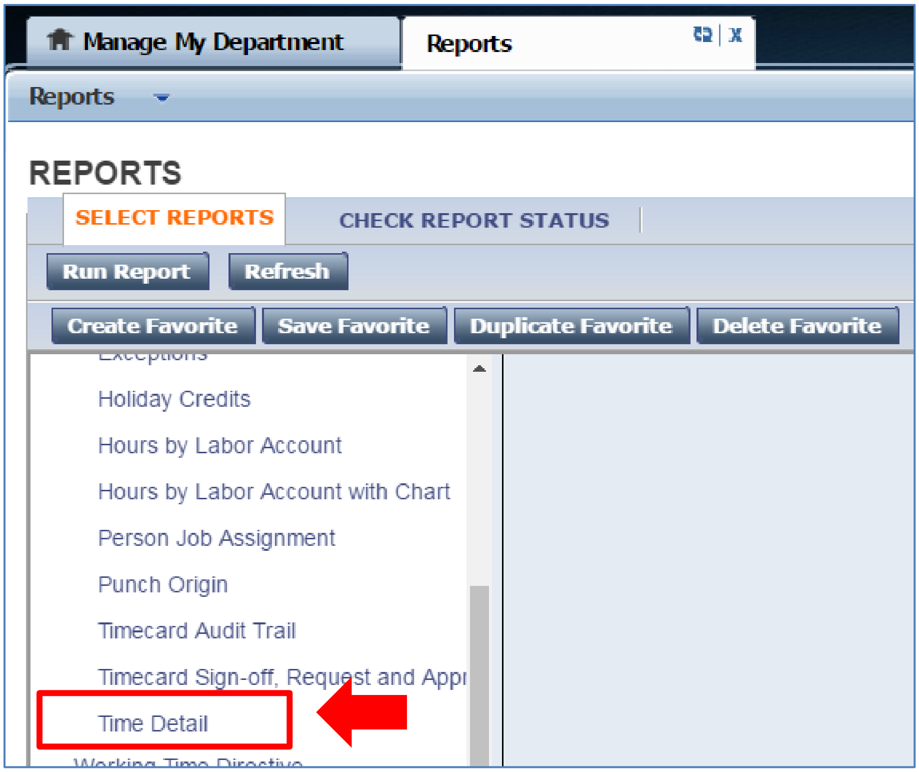
1. Click on **Reports** (located on the right of your timecard in blue tool bar)



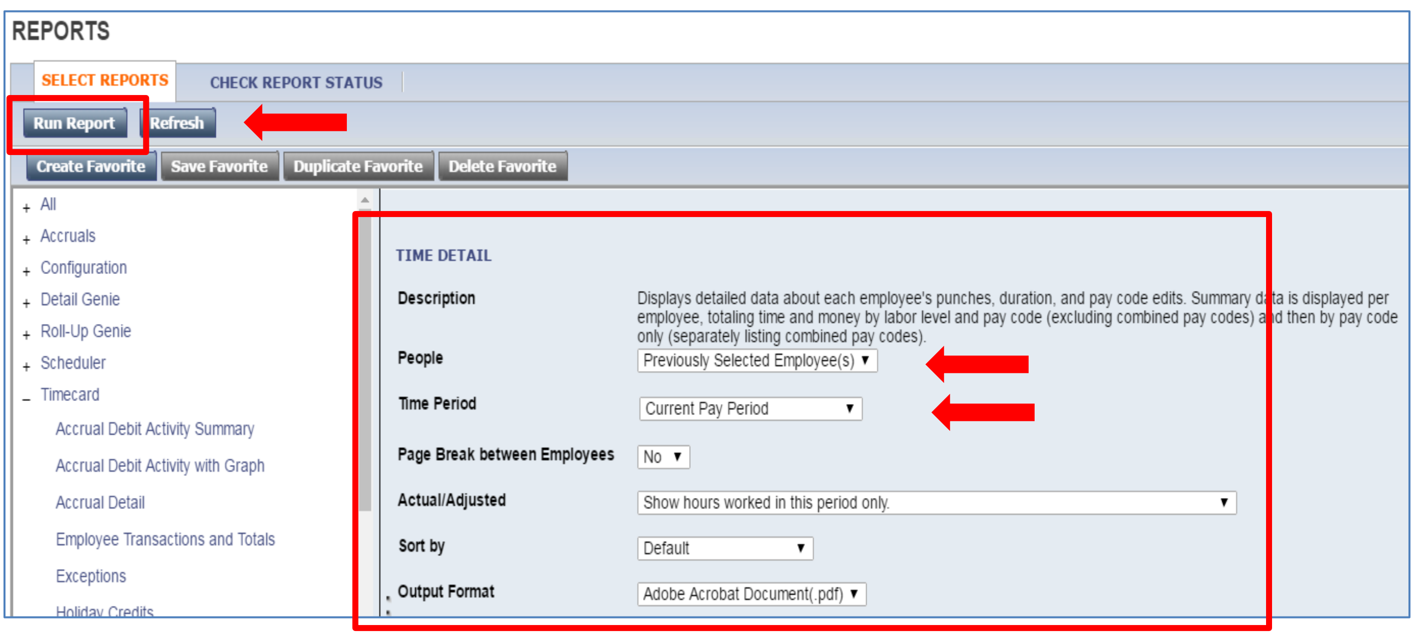

2. Click on **Timecard** (a list of reports will appear)



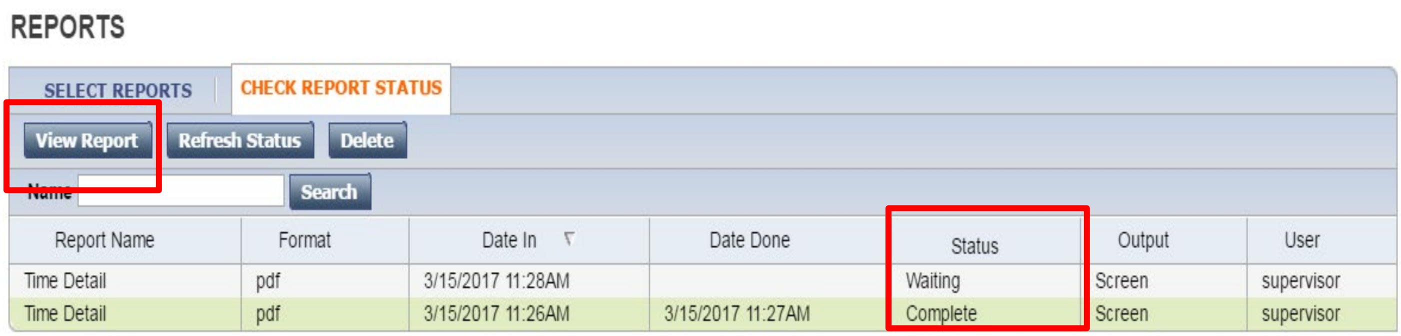

3. Click on **Time Detail**




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<br>*Xfr/Move: Account* | Apply To | In Punch<br>*Comment* | In Exc | Out Punch<br>*Xfr: Work Rule* | Out Exc | Override Amount | Adj/Ent Amount | Money Amount | Day Amount | Totaled Amount | Cum. Tot. Amount |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 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 | | |

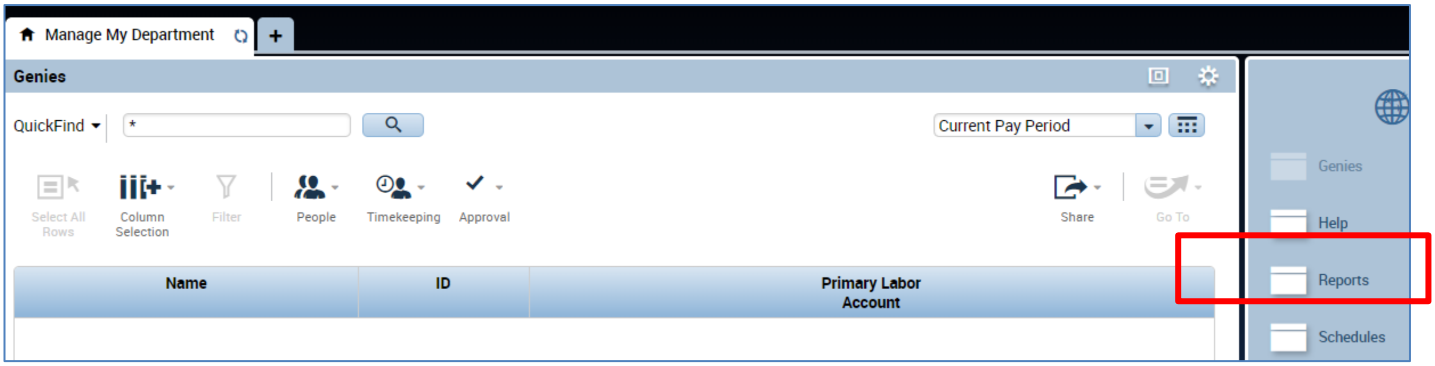
| Combined Pay Code Summary | Pay Code | Hours | Money | Days |
|---|---|---|---|---|
| | C-Holiday Lookback | 24.00 | | |
| | C-Total Hours | 24.00 | | |
| Totals: | | 48.00 | $0.00 | 0.00 |

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

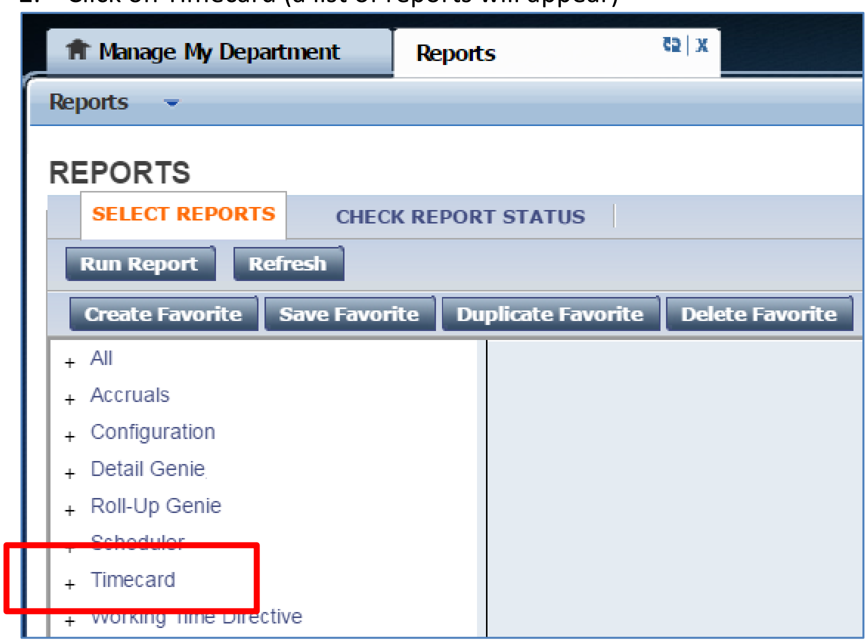
## Accrual Balance Report

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)

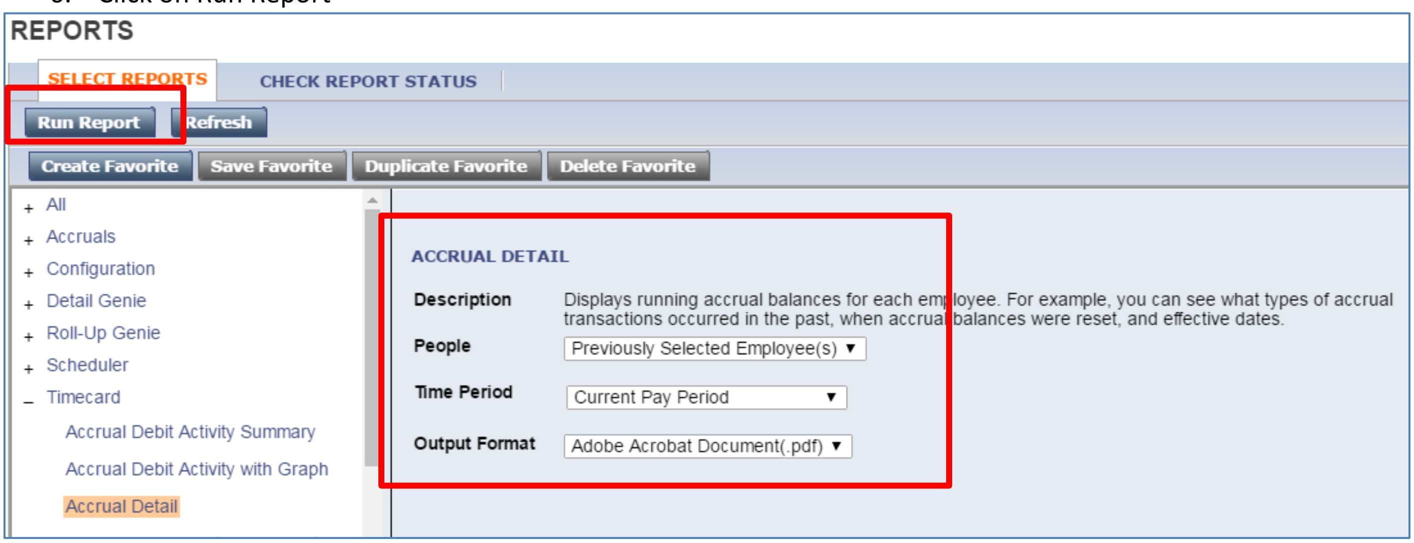



2. Click on Timecard (a list of reports will appear)

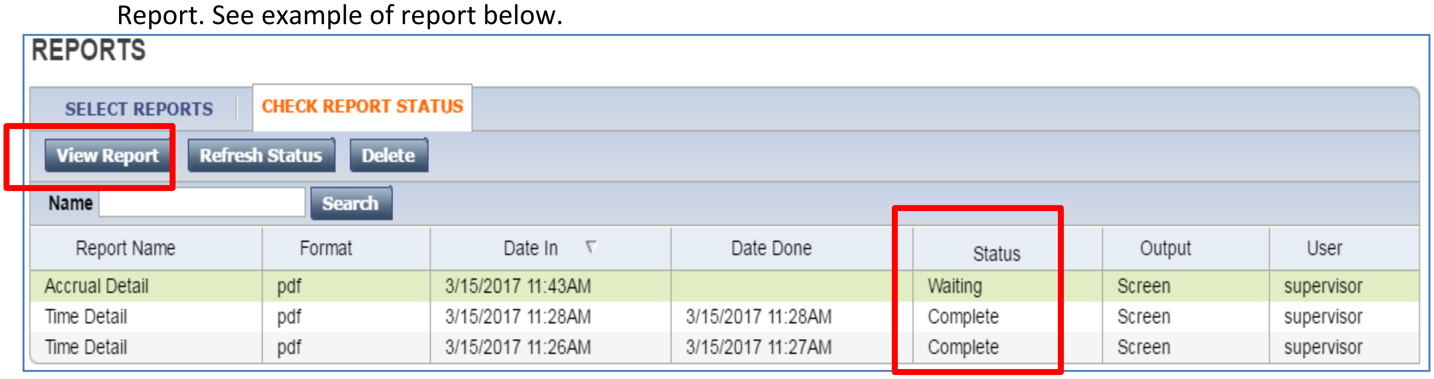



3. Click on Accrual Detail


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

| | | | |
|---|---|---|---|
| Time Period: | Current Pay Period | Data Up to Date: | 3/15/2017 11:43:48 AM |
| Query: | Previously Selected Employee(s) | Executed on: | 3/15/2017 11:43AM GMT-07:00 |
| | | Printed for: | supervisor |

| 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 | | | | |

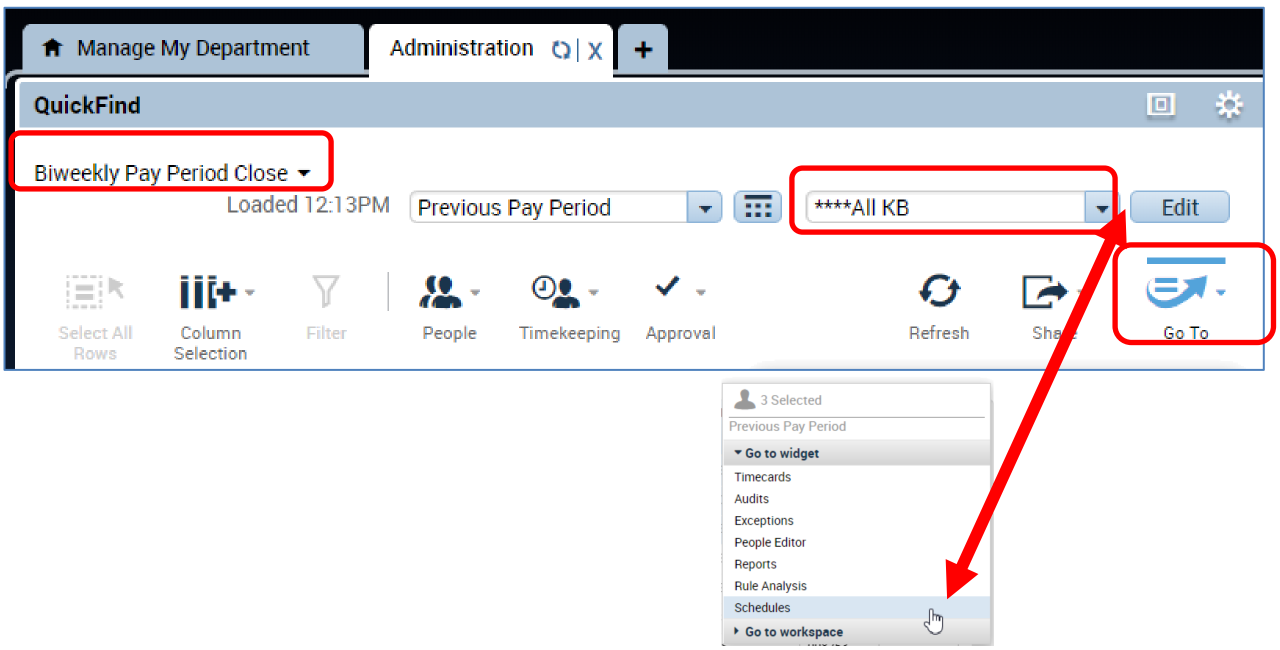
## BLU REPORTS

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 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** Icon 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** Icon and schedules.



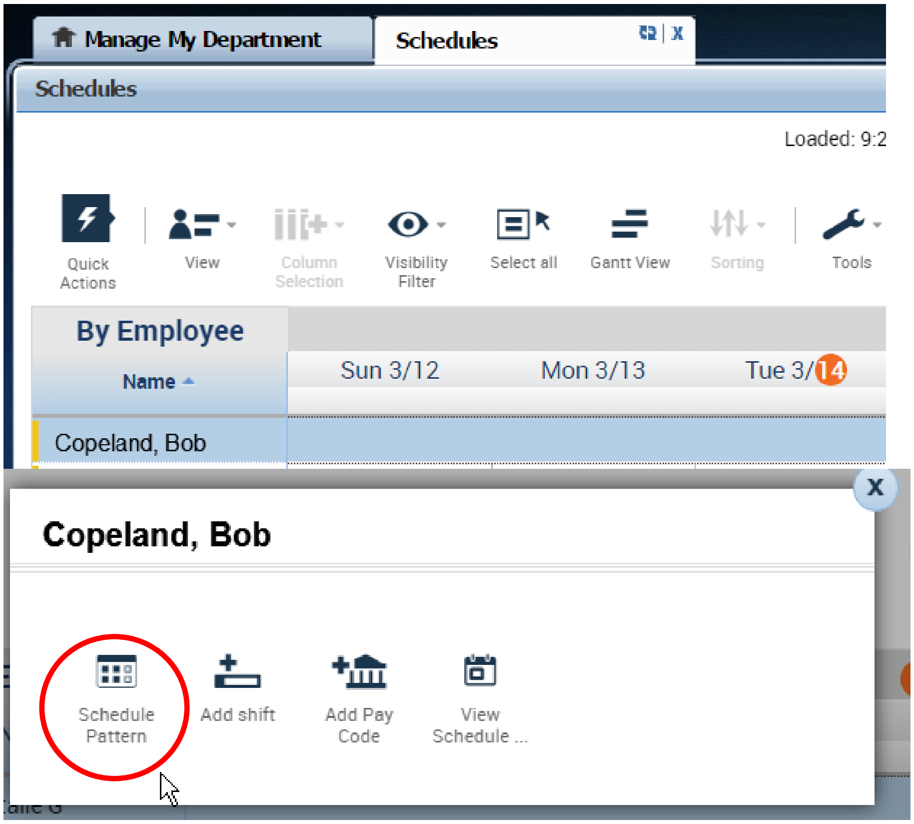

2. A **Schedules** tab will open for all employees. You have the option of setting up a schedule for one employee by clicking on the employees name or you can hold down the Ctrl button on your keyboard and click on multiple names at once (this will highlight all the names selected).
3. Make sure you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

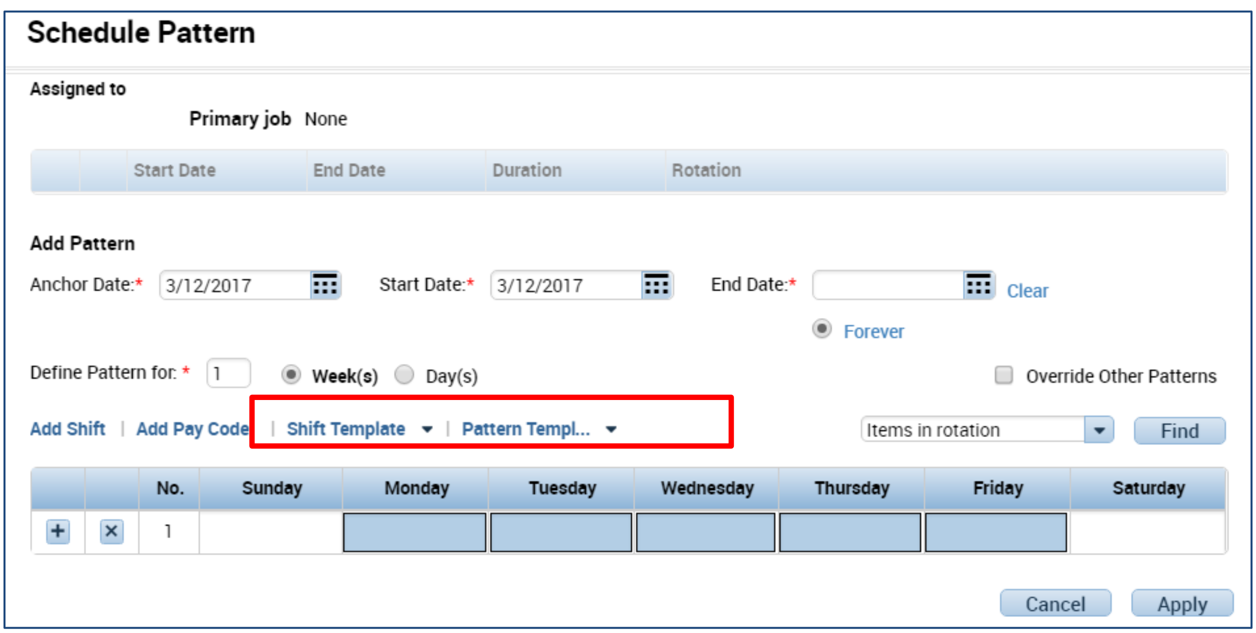
There are several ways to add a schedule. Available for your selection are:

**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

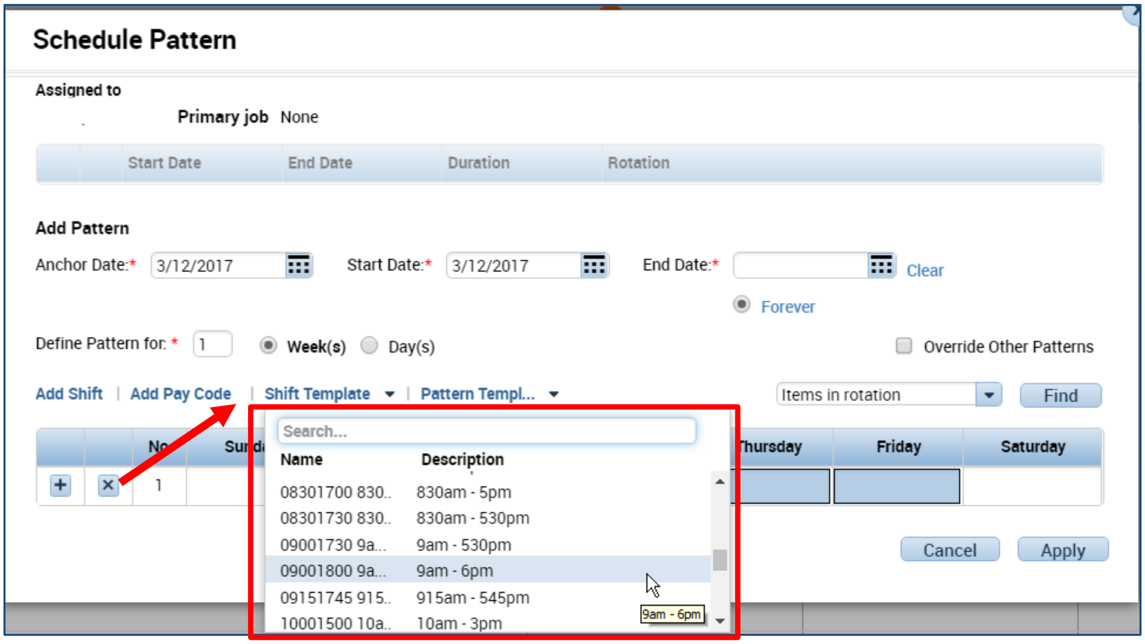
1. Use your mouse and right click on the employees name and click on Schedule template (a Schedule Pattern window will appear)



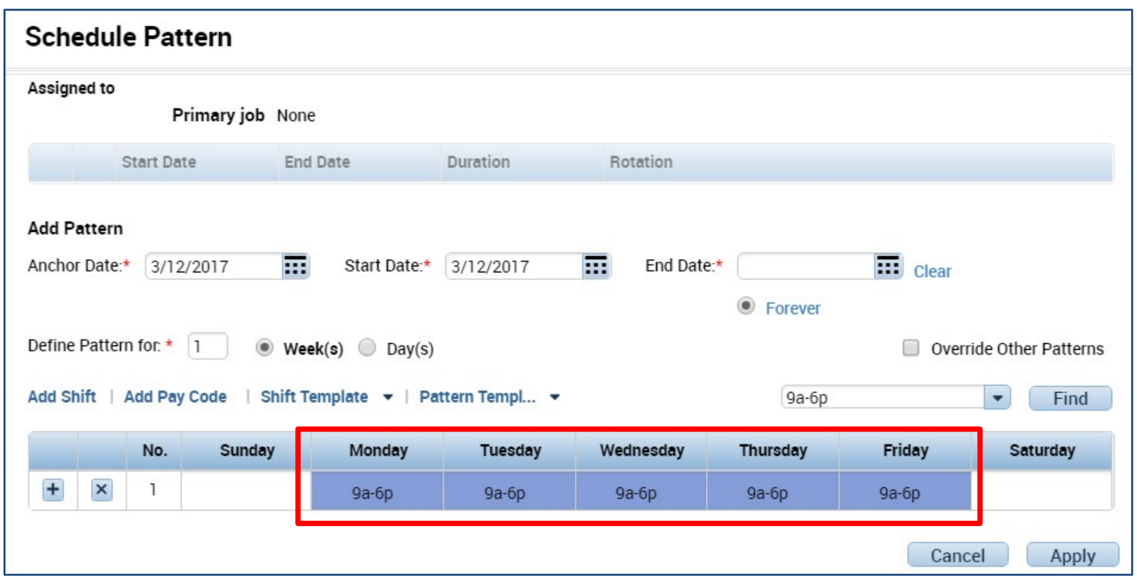

2. Click on the applicable days while holding the Ctrl button on your keyboard and click on Shift Template (Note: if you click Pattern templates instead of Shift Template, then you do not need to perform this step of selecting days because a shift pattern will automatically have the days of the week)



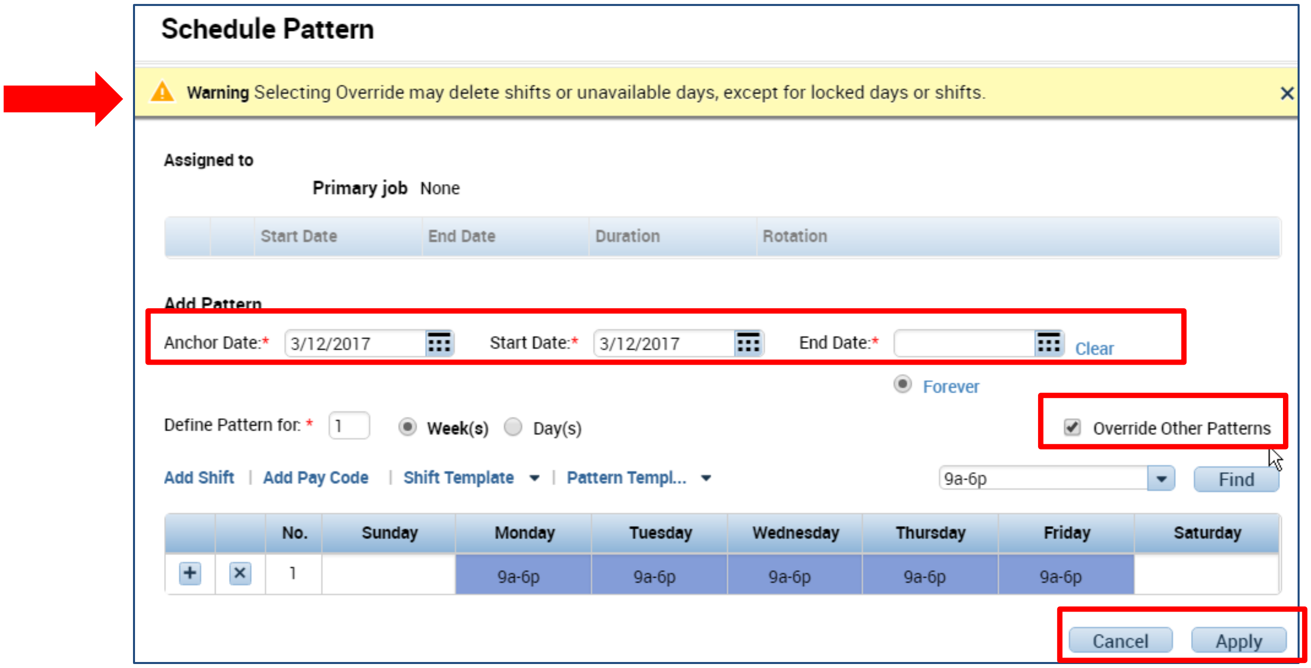

3. Select pre-defined shift from list of shifts



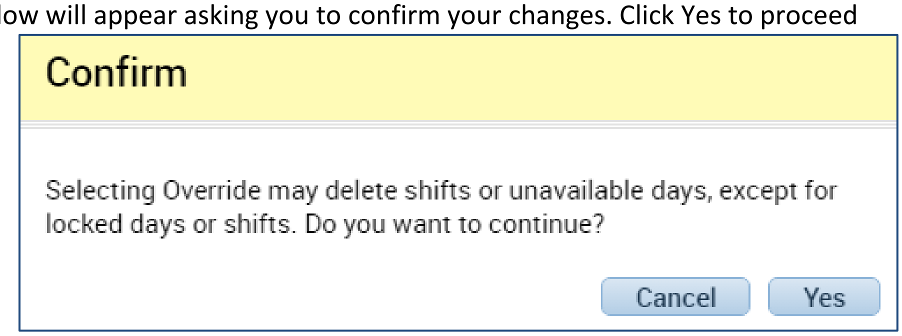

4. The schedule will populate (Note: schedule patterns can span several weeks. For example, an employee may work Monday-Friday 8a-5p every other week and Monday-Friday 9a-6p every alternating week. To schedule this, simply add a row by using the Plus sign icon on the day of the week row shows below).



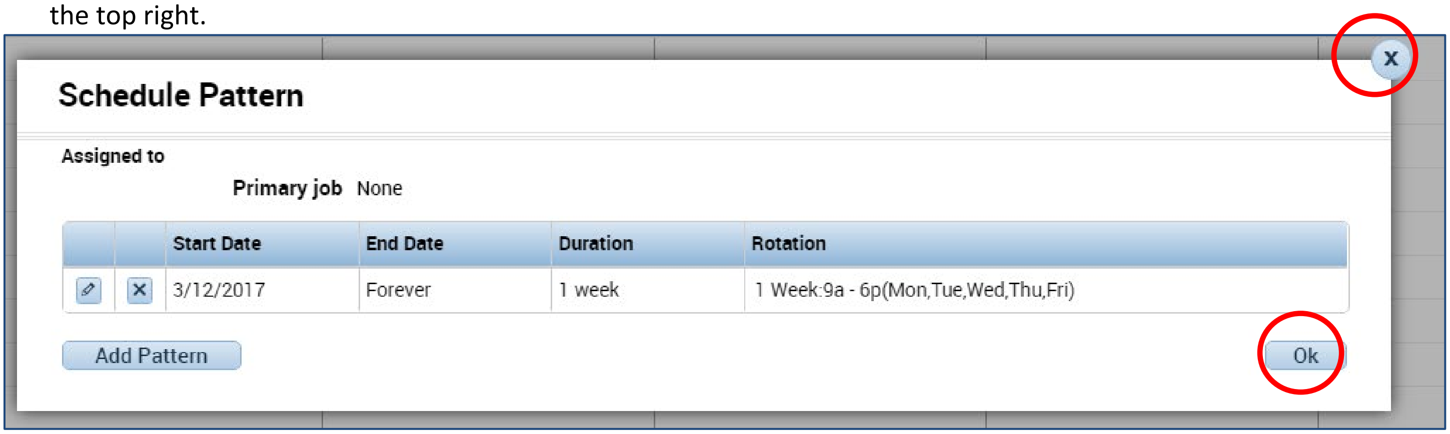

5. To erase any future schedules that were already in place, click on the Override other patterns checkbox (you will receive a warning message that you are deleting other schedules). If the schedule pattern is temporary, do not click on the override check box and insert and End Date in the End date field.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



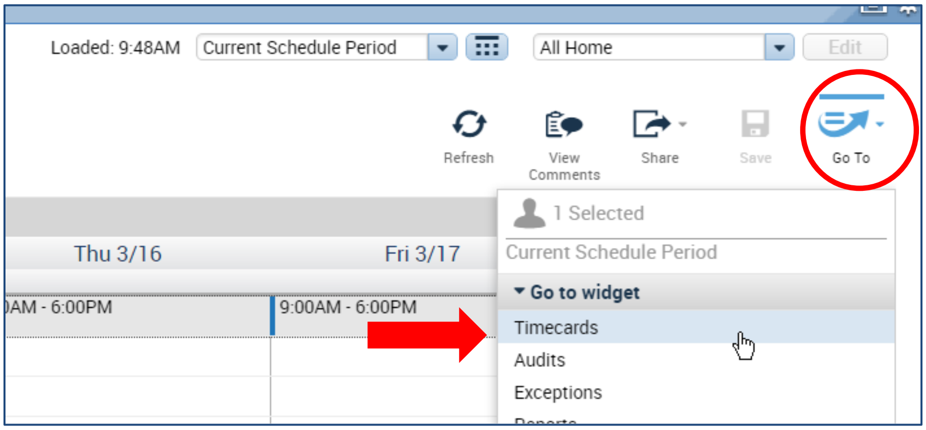

8. A window will appear asking you to confirm your changes. Click Yes to proceed



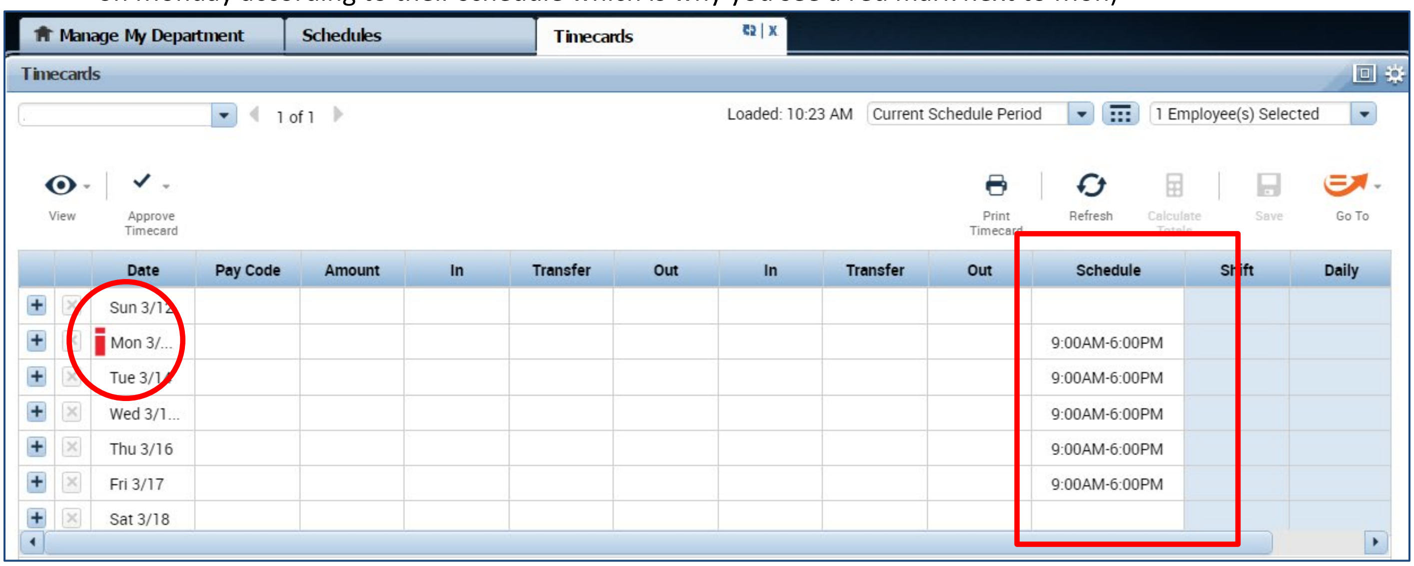

9. The results of your schedule will appear. Review your schedule and click ok if accurate. If the results are correct. Click the save icon at the top right. If the results are incorrect, click the X symbol and click refresh at the top right.



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)

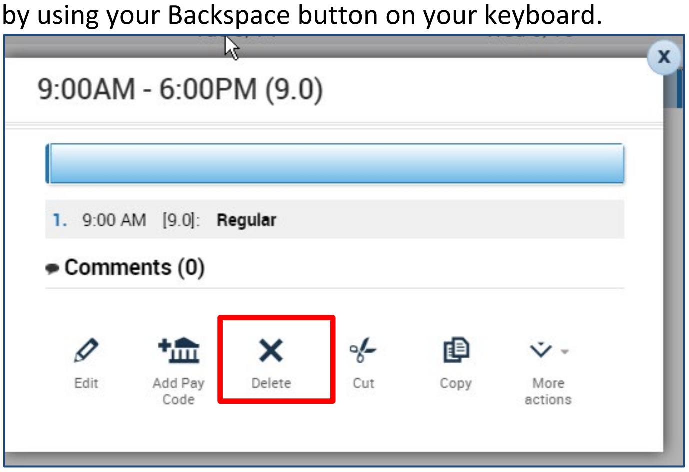



## Edit or Remove a Schedule from a pre-defined shift

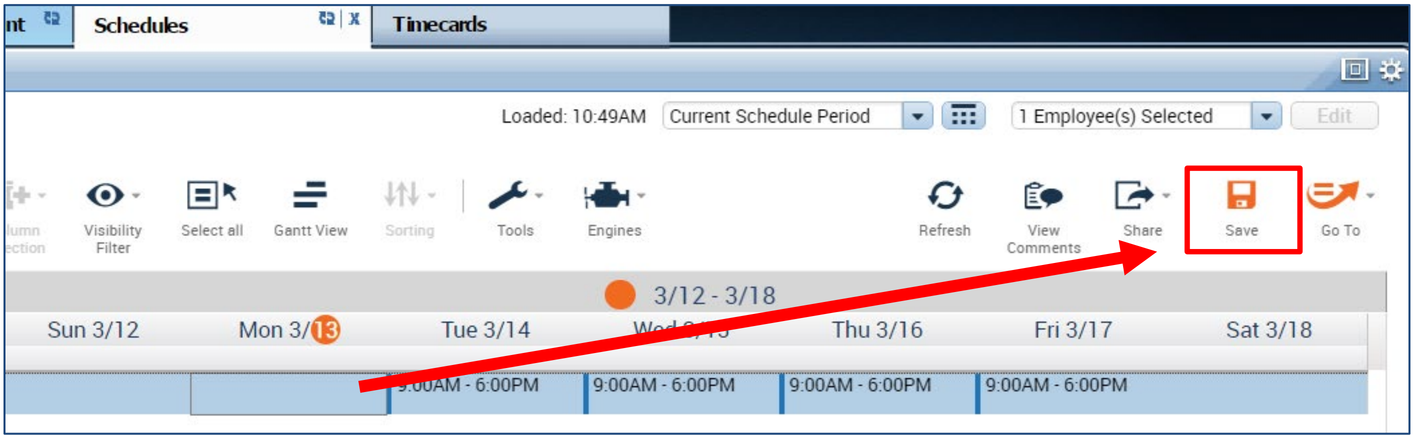
Go to the blue pane window at right of your CalTime screen and click on Schedules or you can access schedules from the employee's timecard by clicking on the Go To icon and click on Schedules

**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.

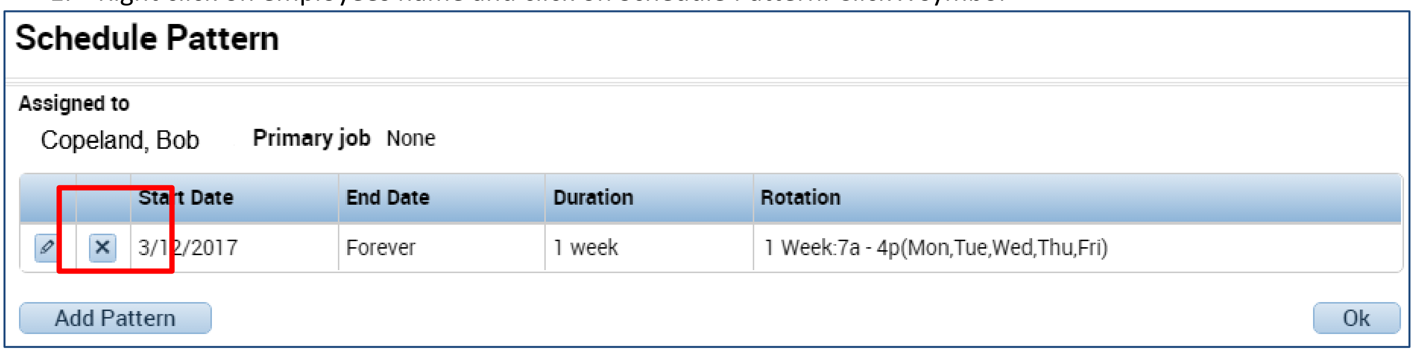


2. Click on Save icon

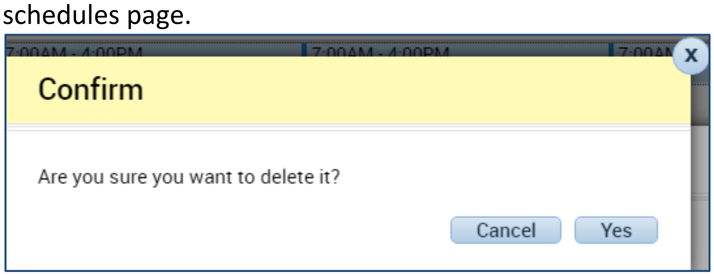



**To delete the schedule completely for all future shifts:**

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.




## 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)
2. **Selecting condition joiners** such as using **And, Or, NOT** (for example, Active as of today AND 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:

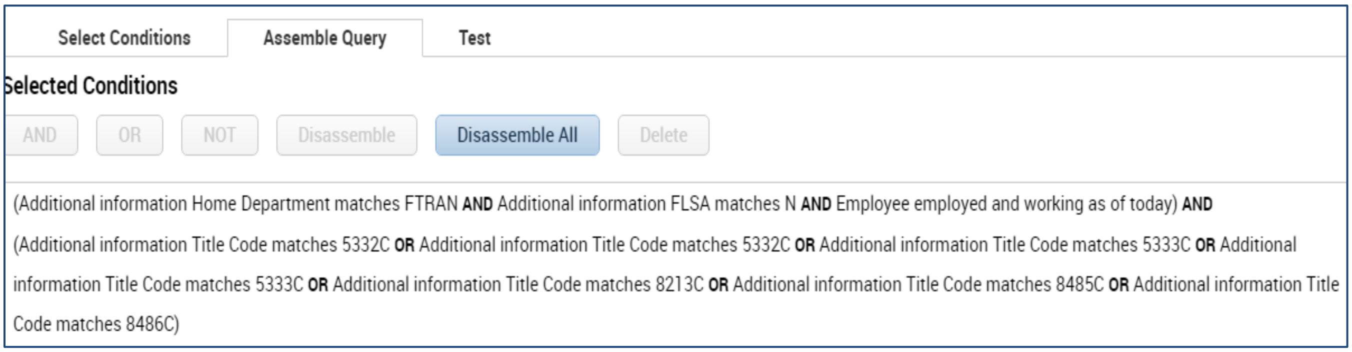
- Numerical fields must always be two digits (e.g. 08 for 8 hours Shift Length)
- Alpha Characters must always be uppercase (e.g. N for non---exempt and E for exempt)

***Note. See the appendix of this document for a list of available <u>Select Condition</u> filters and location***

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

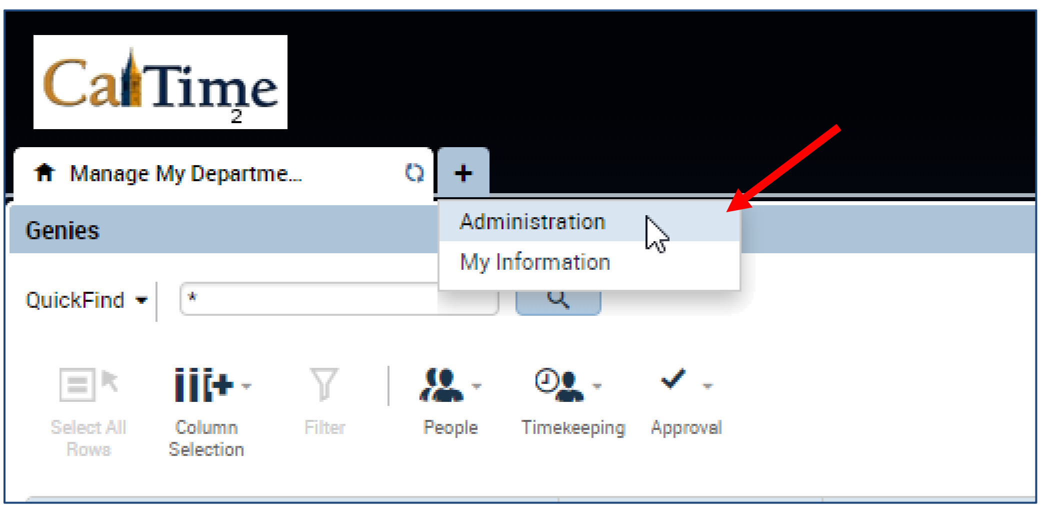
After the conditions criteria is selected, the conditions will need to be assembled using the **And**, **OR**, **NOT** joiners. If the HyperFind query being created will be using multiple similar conditions, e.g., multiple **Job Dept IDs**, or multiple **Supervisor IDs**, be sure and use the **OR** joiner 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).

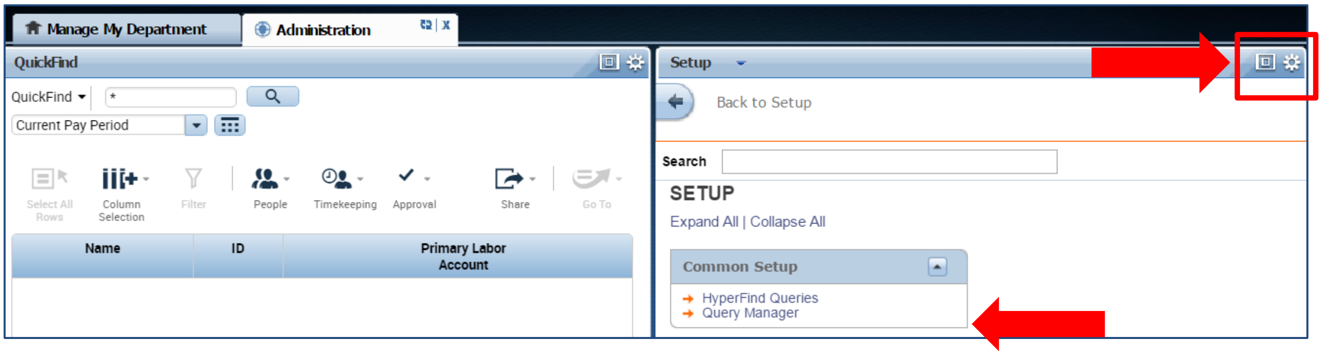



## Access HyperFind Queries via Setup

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.

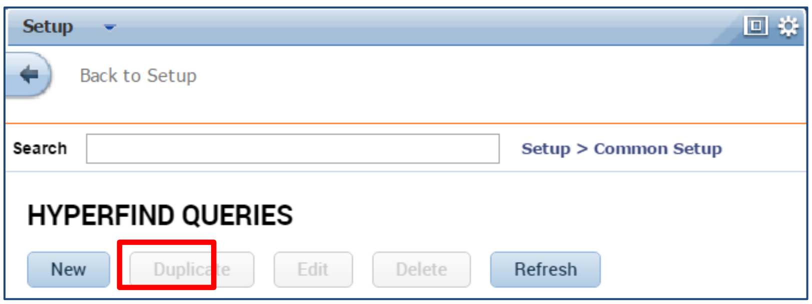


5. The setup page will automatically open
6. To maximize the setup page, click on icon that appears at the top right (square within a square)
7. Click on Hyperfind Queries

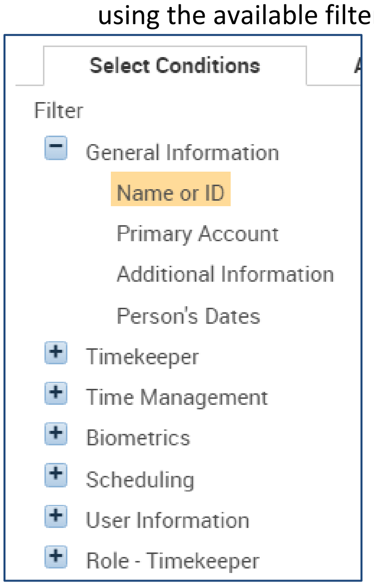



## Create Hyperfind

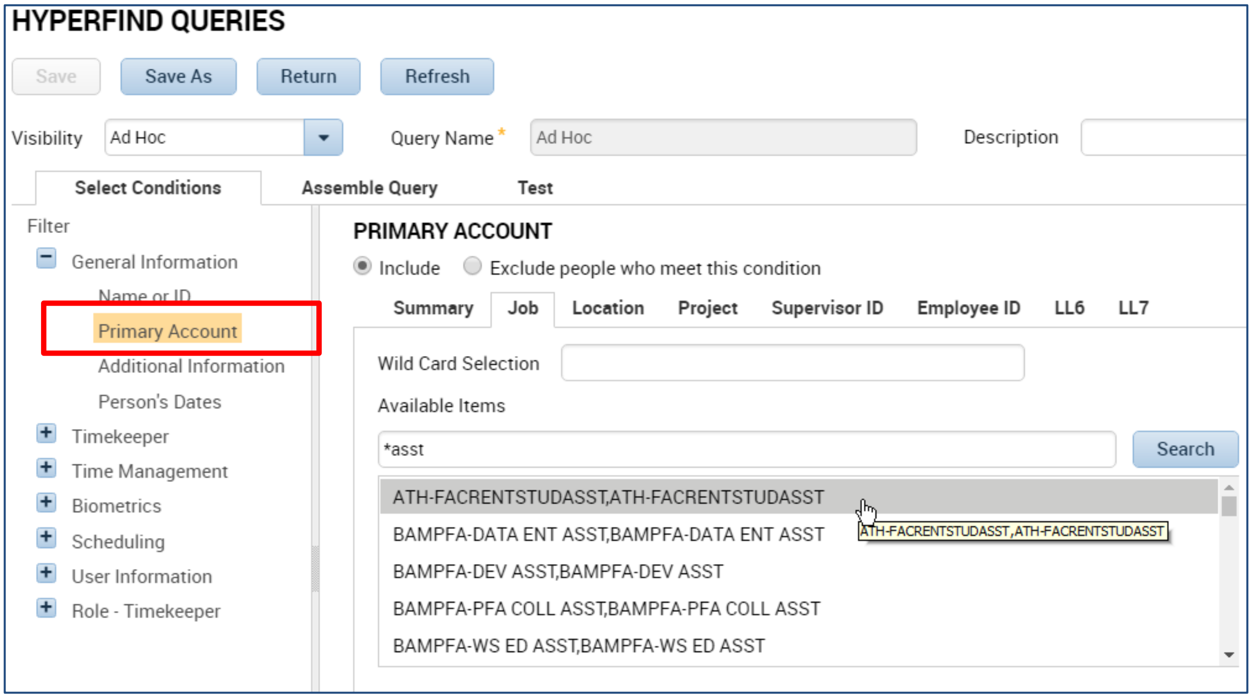
8. Click New



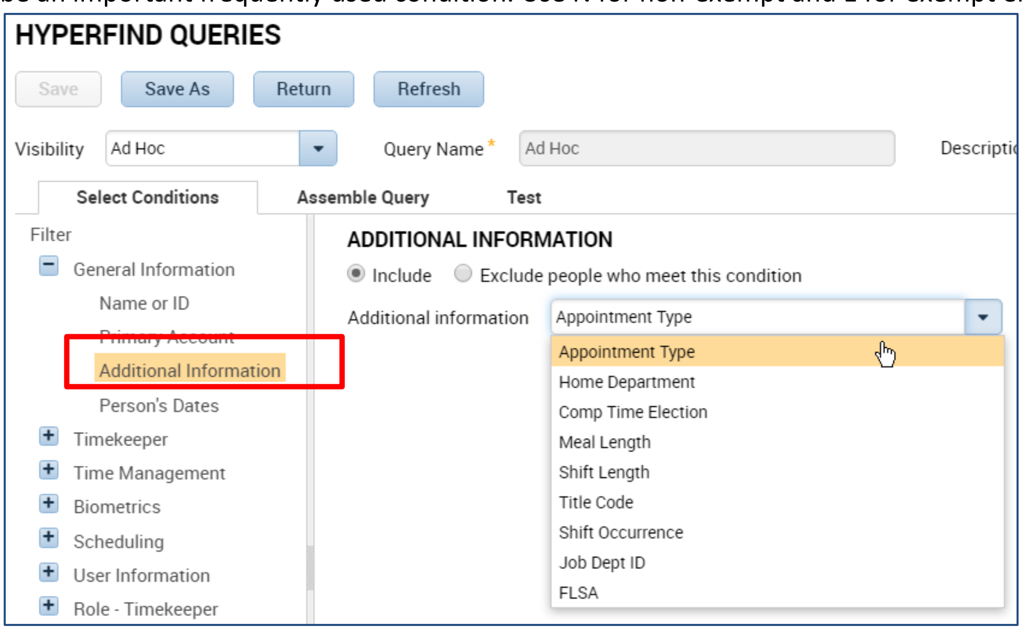

9. The select conditions panel will open on the left side of the setup page. (New Hyperfind queries are built using the available filters and adding required conditions specific to the filter topic.)



**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 query conditions.

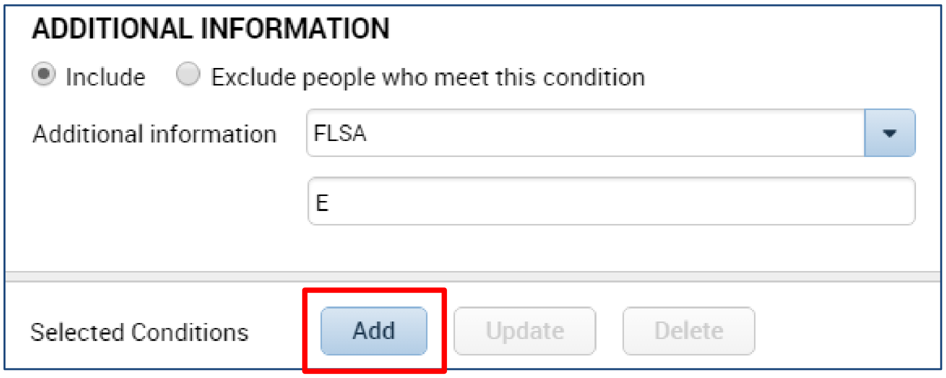



**If you click Additional Information,** the following options will be available to add as a HyperFind condition. It is recommended you use job department ID, rather than home department as a condition in your Hyperfind. FLSA status can be an important frequently used condition. Use N for non-exempt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

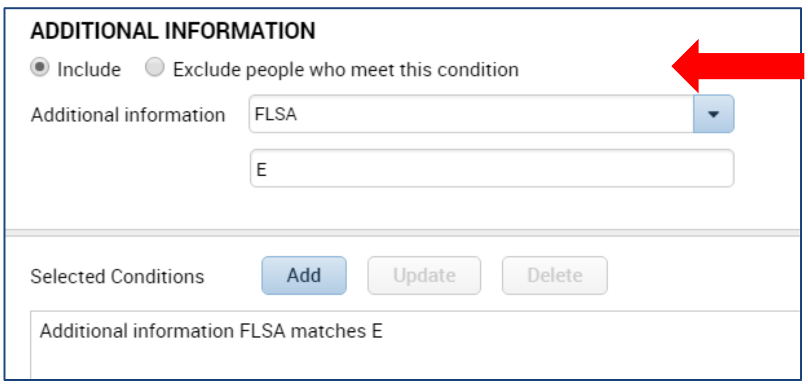



10. The Select Conditions Header will appear on the left side of the window (as shown in examples above). The required conditions fields associated with the Select Conditions Header will appear on the right side of the screen.

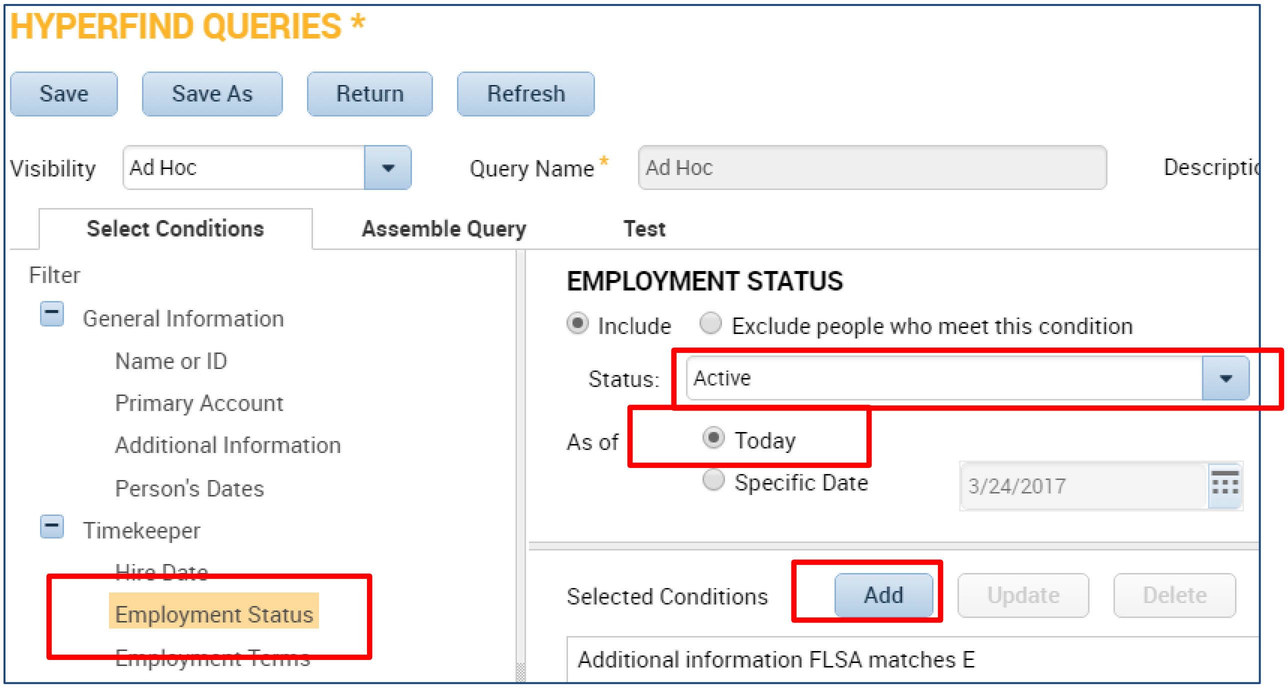
In the example below, the FLSA from the additional information drop down was selected and and type E for exempt was entered in the field directly below the drop down list.  The **Add** button will highlight in blue to prompt the user to Add the field. **Click Add.**



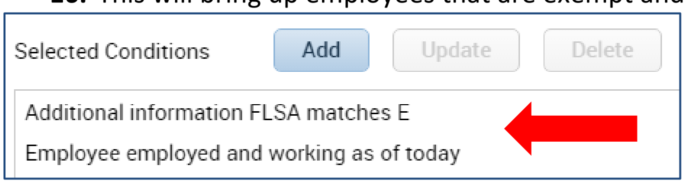

11. If you want to exclude people with a certain condition, click on Exclude people who meet this condition, otherwise select include.




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)

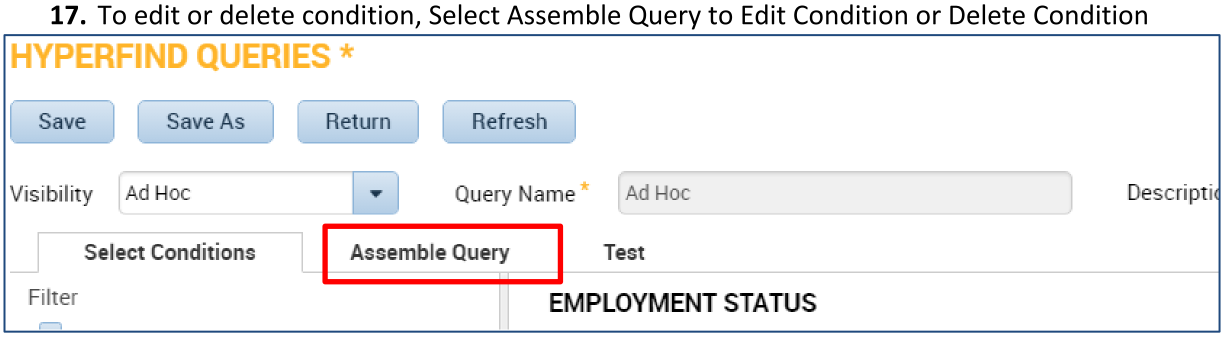



15. After you click Add, you will see the condition appear in the selected conditions box at the bottom
16. This will bring up employees that are exempt and active as of today.

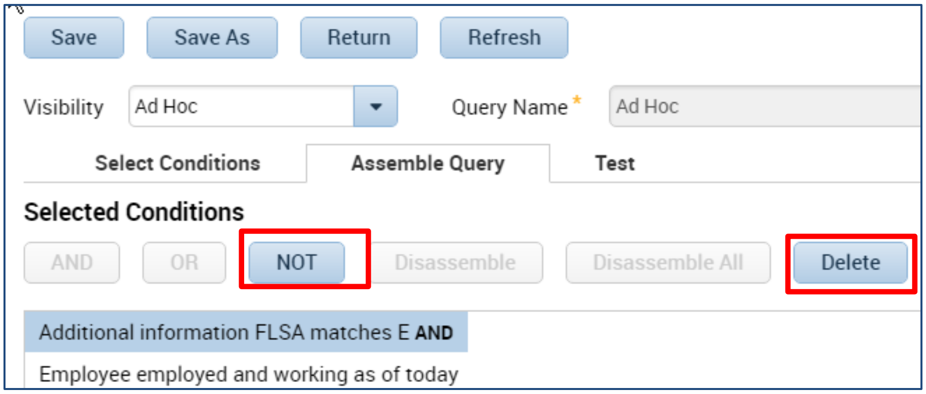



## To Edit or Delete HyperFind Condition

17. To edit or delete condition, Select Assemble Query to Edit Condition or Delete Condition

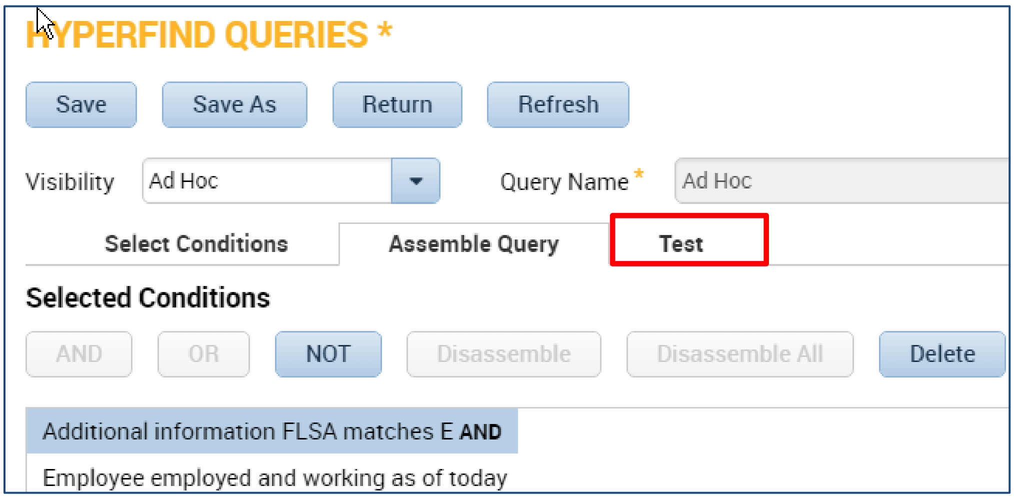



18. Click on the condition in box (in blue below) and the NOT and Delete Button will highlight in blue. You only use the NOT button if you do not want to include a condition below or you can delete the condition entirely by clicking on Delete.




## To Test Hyperfind based on assigned conditions

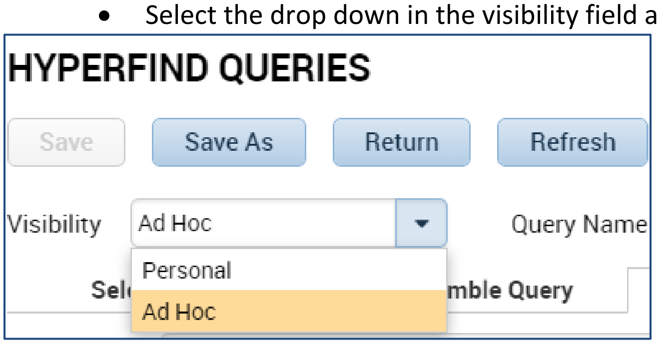
**19.** To test your condition, click on Test. This will enable you to verify your results.



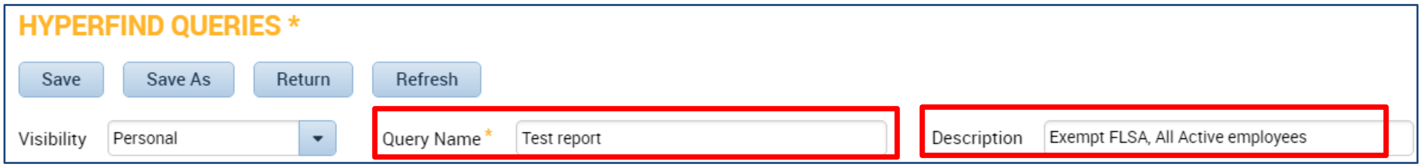

## To Save HyperFind

**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**




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




### New Hyperfinds will display on HyperFind Queries main setup page

Your new hyperfind will appear on the main setup page (see example)

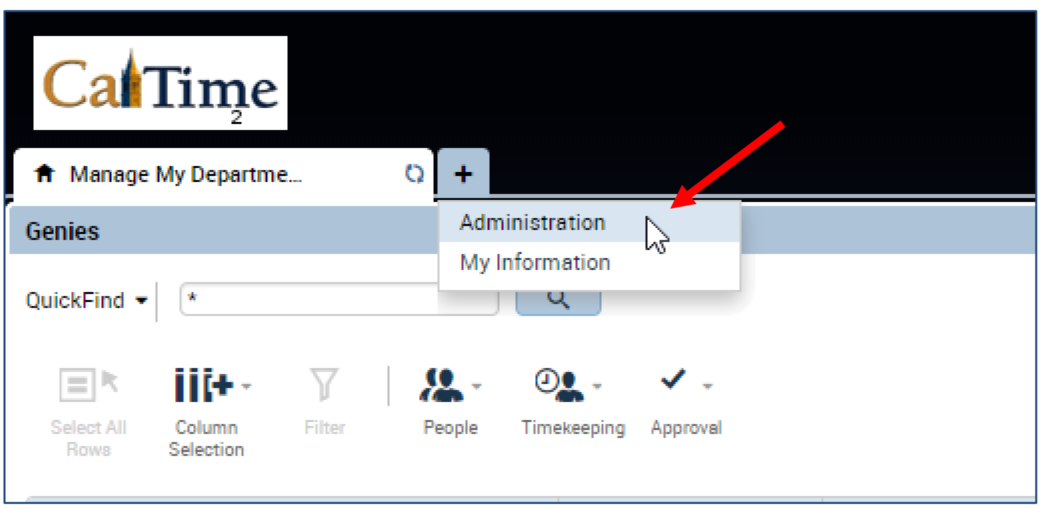

## ASSIGN OR DELETE AND EXISTING HYPERFIND

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:

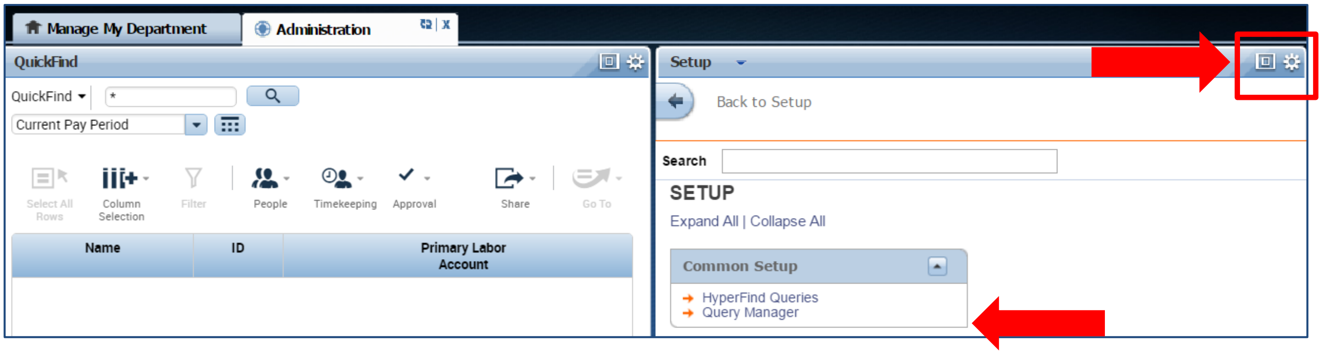
- A new timekeeper is replacing a departing a timekeeper
- A back up timekeeper needs to similar HyperFind views as the primary timekeeper.
- To assist a Manager with viewing a specific population

### 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.

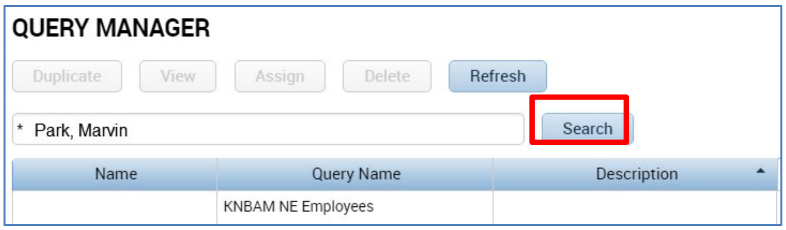



22. The setup page will automatically open
23. To maximize the setup page, click on icon that appears at the top right (square within a square)
24. Click on Query Manager




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

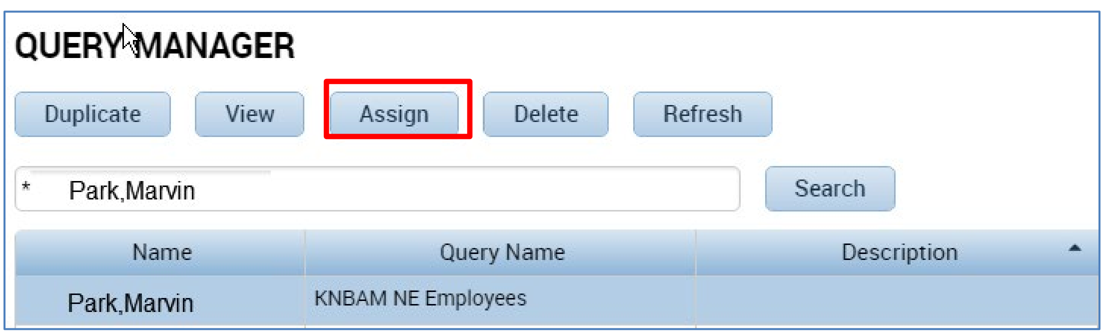
25. Following * (asterisk symbol), enter the name of the person that created the original HyperFind in the search field and click search.



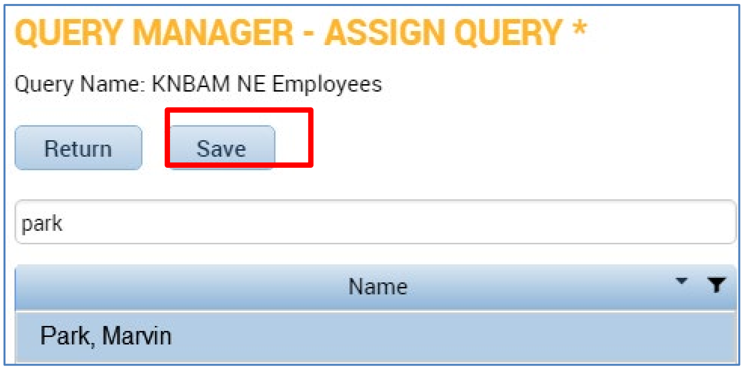

26. Click on Hyperfind (it will highlight in blue) and you will have the ability to Duplicate, View, Assign, Delete, or Refresh the selected HyperFind.

## Assign Hyperfind

27. Click Assign



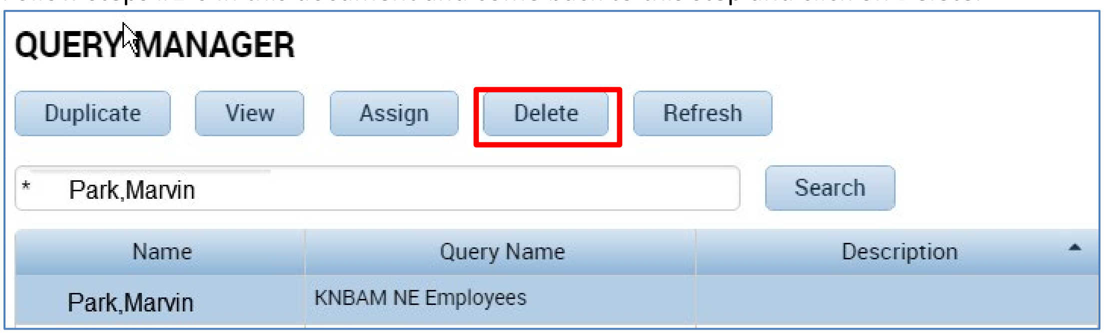

28. The Query Manager –Assign Query window will open. Select the name of the timekeeper or Manager who will be assigned the Hyperfind by searching for the name in the filter field or using the scroll down bar at the right of the list of names. Once you click on the name, the name will highlight in blue. 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



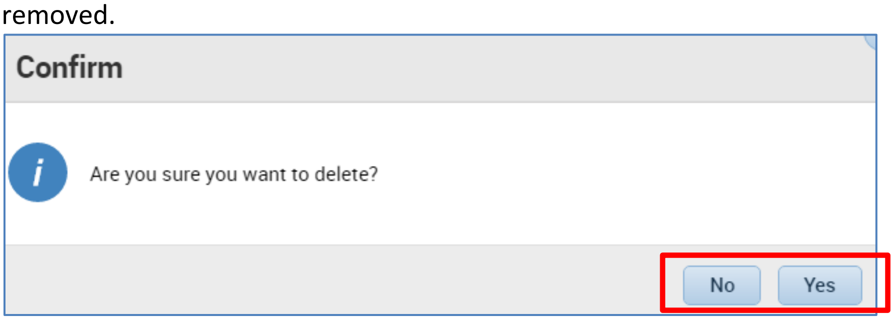

30. Following the * (asterisk symbol), enter the last name, first name of the person you just assigned the HyperFind query to and you should see the HyperFind appear in the their list of available HyperFinds.

## Delete a Hyperfind

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



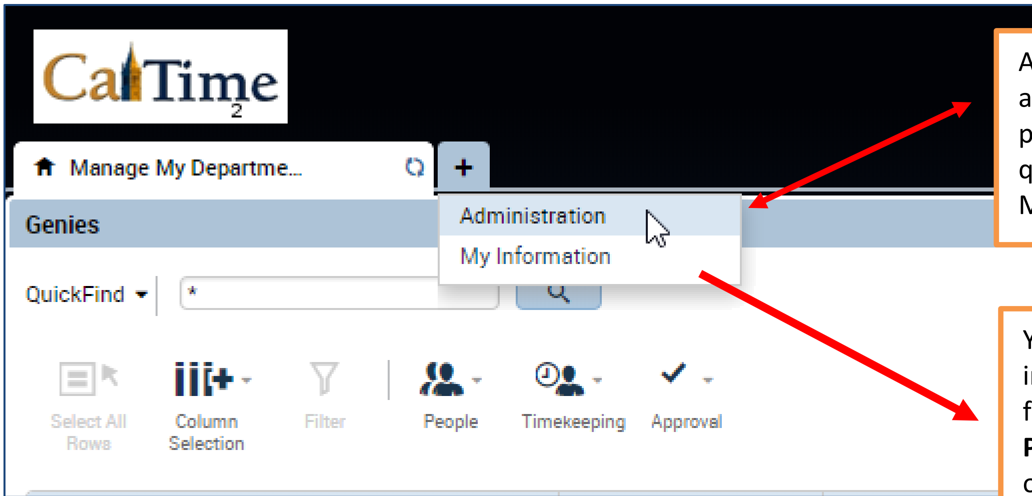

32. Click on Yes or No to confirm if you want to delete the HyperFind. Once you confirm yes to delete, you will be taken to the main HyperFind Query Manager page and you will see that the HyperFind has been removed.



## ACCESSING, REVIEWING AND APPROVING YOUR OWN TIMECARD

### Reviewing your Timecard

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




Administration enables access to the SETUP page such as Hyperfind query's and Query Manager.

Your own timecard information can be found by clicking on the **Plus Icon** and clicking on **My Information** from the dropdown list.

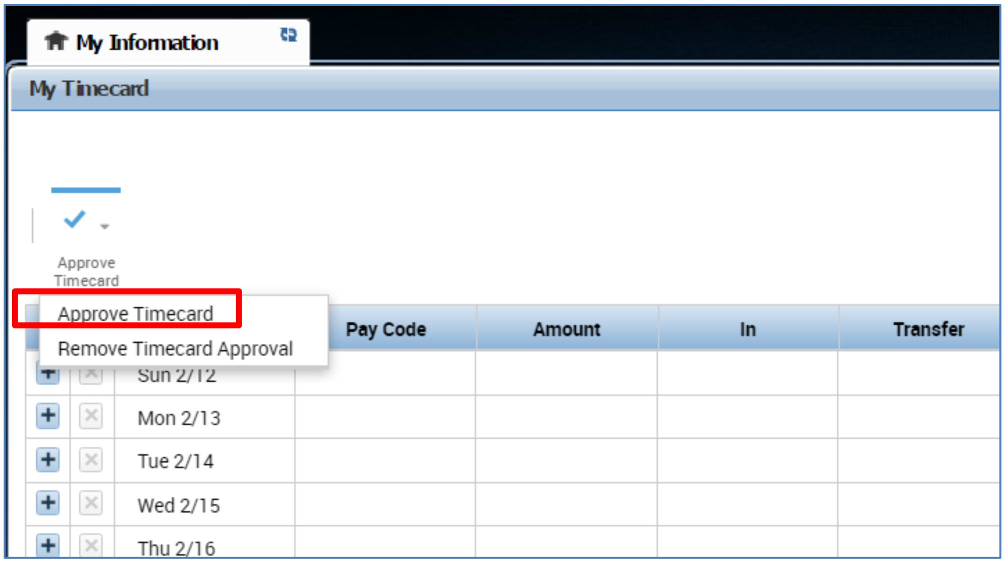
2. Ensure that you are accessing the correct Pay Period
3. Verify that the time at the beginning and end of your shift is accurate
4. Check your Shift and Daily Totals to verify that they add up to the hours of expected work (if you work outside your regular schedule (e.g., you worked night instead of 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. You may also email caltime@berkeley.edu for assistance.

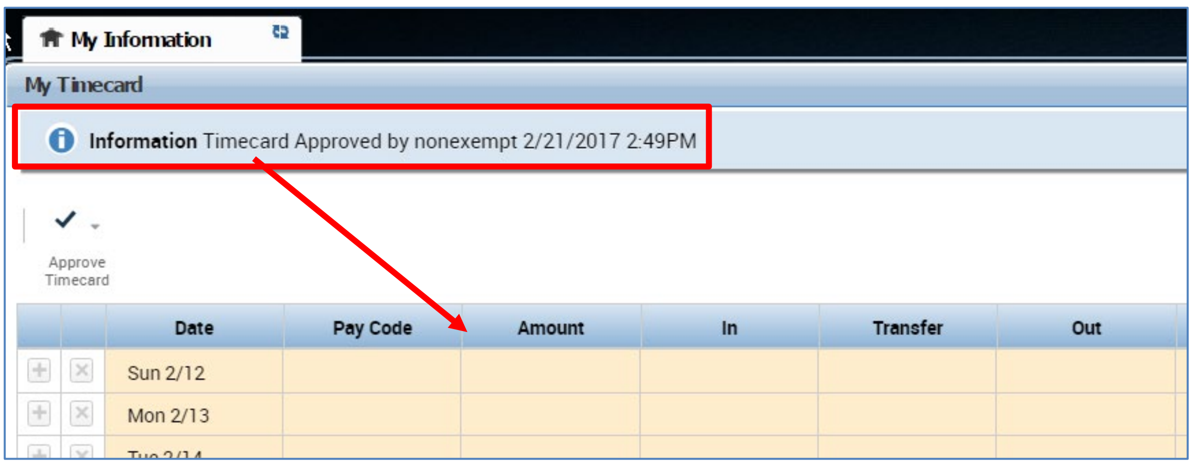
### Add Timecard Approval

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

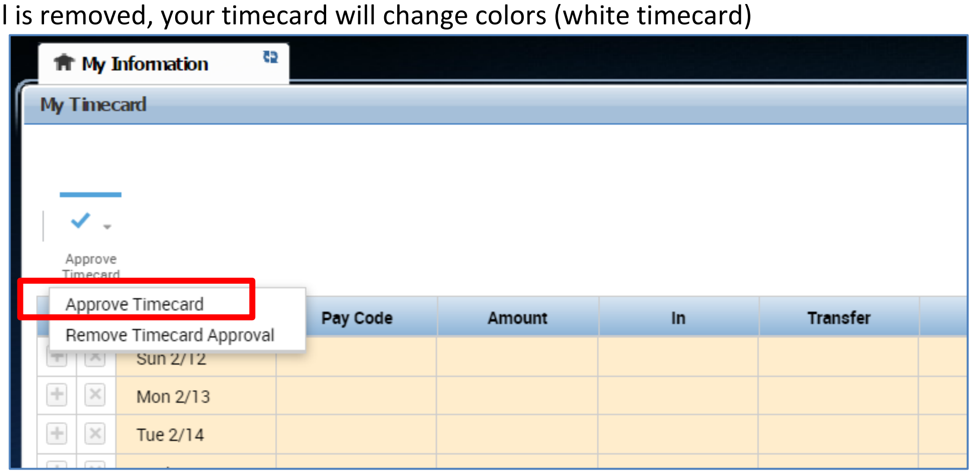



## Remove Timecard Approval

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:** http://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 CSS for questions regarding your HR record or paycheck https://regionalservices.berkeley.edu/home

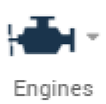
7. **Friendly Names:** Detailed information on how your HR record and job is tied to your timecard via the use of Friendly names setup in the Human Resource system called UCPath https://caltime.berkeley.edu/april-27th-new-caltime-friendly-name-application-hr-admin-released

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 | Approve Timecard<br>Remove Timecard Approval |
|  Print Timecard | Opens Printer friendly version of timecard |
|  Refresh | Refreshes timecard after timecard has been saved |
|  Save | 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 Totals | 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. |
|  Go To | Access the following pages: Timecards, Audits, Exceptions, Reports, Schedules, Management my department, My information |
|  Share | Provides the option to Print, Export to Excel or Export to CSV. |
|  Select All Rows | Selects all employees and highlights the list in blue if you need to perform an action that applies to more than one employee. |
|  Column Selection | This provides a drop down list of columns. You can uncheck the check box to remove that column from your view. |

| | |
|---|---|
|   | Allows you to quickly filter your list of employees by entering an employee ID or entering the partial or full name of the employee |
|   | 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. |
|   | This icon does not apply to Berkeley. Please do not attempt to use it. |
|   | 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. |
|   | Pertains to Schedule Page and allows you to view by Employee, By Schedule Group, By employment Terms |
|   | 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. |
|   | 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. |
|   | This icon does not apply to Berkeley. Please do not attempt to use it. |
|   | This icon does not apply to Berkeley. Please do not attempt to use it. |