Electronic Timekeeping Orientation

Basic Information About Transitioning to Kronos

September 19, 2017
Agenda

1. Introduction  (*Michele Talbott*)
2. Project Overview  (*Jim Corkill and Michele Talbott*)
3. What’s Changing?  (*Michele Talbott*)
4. What Remains the Same?  (*Michele Talbott*)
5. What to Expect from these Changes  (*Michele Talbott*)
6. Process Overview & Schedule  (*Michele Talbott*)
7. Roles and Responsibilities  (*Michele Talbott*)
8. Training Dates  (*Michele Talbott*)
9. Communicating with Your Department  (*Michele Talbott*)
10. Immediate Next Steps  (*Michele Talbott*)
11. Questions
Introduction

Jim Corkill – Project Steering Committee
Michele Talbott – Senior Project Manager
Anne Weger – Kronos System Administrator
Kelly Glendinning – Kronos Support Analyst
Gillian Connor – Kronos Support Analyst
Kevin North – Communications Lead
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Project Overview – What is Timekeeping?

The process of tracking and reporting hours worked and leave time taken
Project Overview – The Electronic Timekeeping Project

2006
Housing & Residential Services adopts Kronos as its departmental timekeeping system.

April 2011
UCSB Operational Effectiveness workgroup proposes implementing Kronos.

January 2012
EVC Gene Lucas announces Kronos is the official campus timekeeping system.

April 2017
Upgrade to Kronos version 8 & migrate to the cloud. No more Java!

May 2018
All campus departments use Kronos.

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Planned</th>
<th>Complete</th>
<th>Remaining</th>
<th>Deadline</th>
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</thead>
<tbody>
<tr>
<td>Departments Using Kronos</td>
<td>206</td>
<td>155</td>
<td>51</td>
<td>5/6/2018</td>
</tr>
</tbody>
</table>
Project Overview - Why are we switching to Kronos?

Case for Change

• Prepares campus for UCPath
• Reduces errors and re-work from manual entry
• Promotes accurate pay for employees
• Promotes compliance with state and federal pay and leave rules, university policies, and labor contracts

Benefits

• Allows tracking of time worked against multiple jobs
• Provides improved visibility of work time, leave usage, and leave balances to employees and supervisors/managers
• Automatically calculates accruals to avoid employee errors
• Saves most staff time and effort
Project Overview – The Electronic Timekeeping Project

Employees in your department will start using Kronos on these dates:

Biweekly Go-Live:  11/19/2017
Monthly Go-Live:   12/1/2017
Monthly Positive Pay Go-Live: 12/16/2017
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## What’s Changing?

<table>
<thead>
<tr>
<th>Process</th>
<th>Paper</th>
<th>Kronos</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do employees fill out a timecard?</td>
<td>Paper timecard</td>
<td>Kronos web interface</td>
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<tr>
<td>How do managers approve timecards?</td>
<td>Sign paper timecard</td>
<td>Approve timecard in Kronos</td>
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<tr>
<td>How is timecard data collected?</td>
<td>Payroll personnel collect paper timecards from employees</td>
<td>Payroll personnel view employee timecard data in Kronos</td>
</tr>
<tr>
<td>How are overtime and accruals calculated?</td>
<td>Payroll personnel manually calculate overtime and accruals</td>
<td>Kronos automatically calculates overtime and accruals</td>
</tr>
<tr>
<td>How is data entered into PPS?</td>
<td>Payroll personnel manually enter hours worked and leave taken into PPS.</td>
<td>Kronos automatically uploads hours worked and leave taken to PPS.</td>
</tr>
</tbody>
</table>
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What Remains the Same?

- The ‘Timekeeping Guidelines Document’ is still the source for timekeeping best practices
- Biweekly, monthly, and monthly positive pay employee pay periods still remains the same
- Processing schedule (pay will still be computed on the same date)
- Policies related to staff members, academic personnel, collective bargaining, and federal funding remains the same
- PPS remains the system of record
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What to Expect from these Changes

There will be some setup required to configure employees

Work shifts from doing manual calculations to analyzing data in Kronos

Payroll Managers will need to monitor and reconcile accruals between PPS & Kronos
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Steps to Go-Live

1. Departmental Meeting
   • Smaller meetings with department Business Officers and financial staff to review the onboarding process and gather data.
   • Departments identify Timekeepers and Payroll Managers.

2. Timekeeper/Payroll Manager Training
   • Kronos team provides an in-depth training sessions to prepare department Timekeepers and Payroll Managers to use Kronos.

3. Manager Training
   • Kronos team provides job aides, a user manual, and an online course to help staff managers and faculty supervisors review and approve employee timecards.

4. Employee Training Documents
   • Kronos team provides user guides and job aids to assist employees in reporting hours worked and leave taken.
   • Departments distribute user guides and job aids to employees.

5. Go-Live
   • Following Go-Live, employees begin tracking hours worked and leave taken in Kronos.
   • Timekeepers and Payroll Managers begin processing timecards via Kronos.

6. Support - Departmental Follow-up Meetings/Training
   • Kronos team meets with department Business Officers, Timekeepers, and Payroll Managers to ensure they are fully prepared to process and approve timecards via Kronos.
Schedule

Electronic Timekeeping September 2017

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<tr>
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Orientation
## Schedule

### Electronic Timekeeping October 2017

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1. **Departmental Meetings**

2. **Timekeeper & Payroll Manager Training Sessions**

Announce Timekeeper & Payroll Manager Training
# Schedule

## Electronic Timekeeping November 2017

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- **2. Timekeeper & Payroll Manager Training Sessions**
- **3. Online Manager Training Sessions**
- **4. Departments Distribute Employee User Guides**
- **5. BW Go-Live**
- **6. Support - Departmental Follow-up Meetings/Training**
# Electronic Timekeeping December 2017

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</tbody>
</table>

- **5. MO Go-Live**
- **5. MO Positive Pay Go-Live**
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## When is a Timecard Required?

<table>
<thead>
<tr>
<th>Common Appointments</th>
<th>Exemption Status</th>
<th>Appointment Type</th>
<th>Type of Time</th>
<th>Timecard Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Variable hourly Staff and Student Assistants</td>
<td>Non-Exempt</td>
<td>Positive Pay (variable)</td>
<td>Hours worked and leave taken</td>
<td>Yes</td>
</tr>
<tr>
<td>Fixed hourly Staff appointments</td>
<td>Non-Exempt</td>
<td>Exception Pay (fixed)</td>
<td>Hours worked and leave taken</td>
<td>Yes</td>
</tr>
<tr>
<td>Readers and Tutors</td>
<td>Exempt</td>
<td>Positive Pay (variable)</td>
<td>Hours worked</td>
<td>Yes</td>
</tr>
<tr>
<td>Fixed non-hourly Staff and Academic titles paid on a fiscal-year basis at 50% or greater</td>
<td>Exempt</td>
<td>Exception Pay (fixed)</td>
<td>Leave taken</td>
<td>Yes</td>
</tr>
<tr>
<td>Graduate Student Researchers (GSRs) and Academic titles paid on a fiscal-year basis less than 50%</td>
<td>Exempt</td>
<td>Exception Pay (fixed)</td>
<td>Submits nothing</td>
<td>No</td>
</tr>
<tr>
<td>Faculty, Teaching Assistants, Teaching Associates, Lecturers and other Unit 18 employees, and By Agreement (BYA)</td>
<td>Exempt</td>
<td>Exception Pay (fixed)</td>
<td>Submits nothing</td>
<td>No</td>
</tr>
</tbody>
</table>
Timekeeping Roles and Responsibilities

Non-Exempt Employees

- Record hours worked and/or leave taken to the nearest quarter hour increment.
- Approve timecard by pay period end.

Exempt Employees

- Record all absences in full-day increments, or in increments that are equivalent to a part-time, standard or alternate work schedule.
- Approve timecard even when no leave has been taken.
Timekeeping Roles and Responsibilities

Managers/ Supervisors

- Review and approve employee hours worked and/or leave taken.
- Work with the employee and/or departmental payroll staff/payroll manager to correct errors.
- Approve timecards on a biweekly and/or monthly basis.
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Training

Timekeeper and Payroll Manager Training Sessions
Select one session. Sessions are from 8:30 a.m. to 4:30 p.m. with a break for lunch.

• Monday October 30 – Phelps 1513
• Friday November 3 – SSMS 1303
• Monday November 6 – Phelps 1513

Employee User Guides Available for Distribution by Departments

• Monday November 13 – Friday November 17, 2017

Manager Online Training Available via LMS and timekeeping.ucsb.edu

• Monday November 13 – Friday November 17, 2017

Departmental Follow-up Meetings/Training

• Wednesday November 15 and Tuesday November 21, 2017
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Communicating with Your Department

Our role

Provide guidance throughout the onboarding process:

• Inform relevant parties of upcoming meetings and training sessions
• Host training sessions
• Provide training materials to departments for distribution to employees and managers/supervisors.

Your role

Actively communicate the following, especially around key dates:

• This is a collaborative process
• It will improve the accuracy of calculations
• All employees will receive some form of training or guidance based on their role within the department
• ETS streamlined and simplified the process as much as possible
• The Electronic Timekeeping project team is here to support them
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Immediate Next Steps

Action Items

• Departmental Meeting:
  • Prior to: Review onboarding questions
  • Prior to: Complete employee reporting structure spreadsheet and email them to Michele Talbott – by Friday, September 22, 2017
  • Attend department meeting

• Proactively communicate news about the Kronos transition to your department

• Proactively notify project team of questions or concerns
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