This document supports Kronos Version 7.

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For assistance, submit an Electronic Timekeeping ticket at http://etsc.ucsb.edu
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Introduction

Welcome to Kronos Workforce Central, the official time and attendance system for UC Santa Barbara. Kronos is an integrated system which uses networked time clocks and computer terminals, replacing paper timecards and manual time calculation and reporting. This manual aims to help employees, managers and timekeepers accomplish daily, weekly, bi-weekly, and monthly timekeeping tasks through detailed explanations and step-by-step examples.

What type of Employee am I?

There are two major types of employees within Kronos:

1. Non Exempt Employees
   - Required to track all hours worked and leave taken

2. Exempt Employees
   - Required only to track leave taken

If you are unclear as to which type of employee you are, please contact your Office/Payroll Manager.
SECTION I
NON-EXEMPT
EMPLOYEES
Section I – Non-Exempt Employees: Timekeeping Procedures

Timekeeping Procedures

Time Clock Employees (With Only One Job)

Time Clock Employees swipe a card at a Kronos 4500 terminal to clock in and out. For information regarding time clock use, please visit https://timekeeping.ucsb.edu.

Non-exempt employees use their Access (One Card) or Police-issued ID cards to clock in and out.

PER SHIFT:

1. Swipe card at beginning of shift.
2. Swipe card when leaving for and returning from lunch or appointment (if required).
3. Swipe card at end of shift.

REQUIRED APPROVALS:

Employees are required to approve timecards at the end of each pay cycle.

1. Press the blue button next to Approve Timecard on the time clock.
2. Swipe card.
3. Choose:
   a. Current Pay Period if it is on or before the last day of the pay cycle.
   b. Previous Pay Period if it is after the last day of the pay cycle.
4. Scroll through the timecard using the blue up and down arrows on the clock and verify the information is correct; any discrepancies should be addressed with the manager prior to approval.
5. Once the bottom of the timecard is reached, press the ENTER/ button to approve.
6. Press the ESC/ button.

AT ANY TIME:

The employee can view their timecard at anytime, with the following steps:

1. Press the blue button next to View Timecard on the time clock.
2. Swipe card.
3. Choose Previous Pay Period or Current Pay Period.
4. Scroll through the timecard using the blue up and down arrows on the clock and verify the information is correct; any discrepancies should be addressed with the manager prior to approval.
5. When done, press the ESC/ button.
Section I – Non-Exempt Employees: Timekeeping Procedures

Time Clock Employees (With Multiple Jobs)*

**Step 1:** Press **Choose Job** (blue button). → **Step 2:** Swipe badge. → **Step 3:** Press **List**→ (blue button).

![Image of time clock interface with steps highlighted]

**Step 4:** Select job* (blue up/down arrows). → **Step 5:** Press **Enter** twice. → **Step 6:** Confirmation displays.

*Please Note:
- If you clock in to the incorrect job, repeat Steps 1-6 for the correct job.
- To clock out of a job, simply swipe your badge; no selection of job is necessary.
- To approve your timecard, follow the instructions on the previous page.
- “Job” format: DEPT_Work Study Code_Hourly Wage (Labor Account).
Section I – Non-Exempt Employees: Timekeeping Procedures

Time Stamp Employees (With One or More Jobs)

Time Stamp Employees will use a designated computer to clock in and out of the Kronos system.

To access Kronos, open an internet browser and navigate to https://timekeeping.ucsb.edu. This will display the Timekeeping portal page, which contains the link to accessing Kronos. Click the link to log on to Kronos.

This will open the Kronos logon page in a new window.

To log on to Kronos:

- Non-exempt employees use their UCSBnetID and password.
- If the system prompts you to remember your password, click No/Not for this site.

To log on to Kronos:

1. Log on to Kronos at the start of the shift.

2. If employee has multiple jobs, select which job/distribution to clock in to; if employee has only one job, then skip to step 3. Please note: the format of each available job is: DEPT_Work Study Code_Hourly Wage {Labor Account}.

3. Press the Record Timestamp button in the middle of the screen.

4. The screen will show the time stamp information.

5. To clock out from a shift, simply press the Record Timestamp button without any job selection.

6. Log off from Kronos by clicking Sign Out in the upper left corner.

   Remember to clock in and out for lunch (if required) and utilize these instructions.
Time Duration Employees (With One or More Jobs)

Time Duration Employees will use a designated computer to record time in the Kronos system.

To access Kronos, open an internet browser and navigate to https://timekeeping.ucsb.edu. This will display the Timekeeping portal page which contains the link to accessing Kronos. Click the link to logon to Kronos.

This will open the Kronos logon page in a new window.

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**To log on to Kronos:**

- Non-exempt employees use their UCSBnetID and password.
- If the system prompts you to remember your password, click No/Not for this site.

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**PER SHIFT**

At the end of each shift/day:

1. Logon to Kronos.
2. Find the day’s date and click in the Pay Code column.
3. Choose the correct pay code from the drop down menu.
4. Hit tab or click in the Amount column and enter the number of hours.
5. If employee has only one job, skip to step 6. If employee has multiple jobs, select which job/distribution to attribute each pay code’s hours to, then continue to step 6. Please note: the format of each available job is: DEPT_Work Study Code_Hourly Wage {Labor Account}.
6. Click Save.
7. Log off from Kronos by clicking Sign Out in the upper left corner.
All Non-Exempt Employees

ADDING A ROW ON THE TIMECARD

Only employees who have the ability to manually enter their "Pay Code" and "Amount" of hours onto their timecard can add a row. The employee can select the row that they want to add an additional row to, and click the "More" button at the top of their timecard. Then click "Add Row." Then the employee can add any "Pay Code" and hours "Amount" to that new line.

1. Click in the row to which you would like to add an additional row.
2. Click the "More" button.
3. Click "Add Row" in the drop down menu.
4. A new row is added, allowing you to enter a new "Pay Code" and "Amount" of hours. The "Date" of the new row is assumed by the row above it.
5. Click "Save" once you have entered in the Pay Code and Amount of hours.
Section I – Non-Exempt Employees: Timekeeping Procedures

ADDING A COMMENT ON THE TIMECARD

Only employees who have the ability to manually enter their "Pay Code" and "Amount" of hours onto their timecard can add a comment in a populated field in the "Amount" row. To enter a comment, first enter the appropriate "Pay Code" and "Amount" of hours, then click on the "Amount" field and select "Comments."

1. Click the "Amount" cell.
2. Click "Comments."
3. Select an appropriate comment option and click the green plus sign to add in any further clarification.
4. Click OK.
5. You can hover your cursor over the newly created blue bubble and the entered comment will display in a small yellow box.
REQUIRED APPROVALS FOR THE TIMECARD

Employees are required to approve timecards at the end of each pay cycle:

1. To access the timecard, logon to Kronos.

2. Verify the correct pay period is in view by checking the Time Period above the timecard.
   a. If the current date is on or before the end of the pay cycle, leave it as Current Pay Period.
   b. If the current date is after the end of the pay cycle, change it to Previous Pay Period by clicking the drop down arrow.

3. Scroll through the timecard to verify the information is correct; any discrepancies should be addressed with the manager prior to approval.

4. Click More above the timecard.

5. Choose Approve.

6. The upper left corner of the timecard will now display a Timecard is Approved message confirming the approval was made as of the indicated date stamp.

7. Log off from Kronos by clicking Sign Out in the upper left corner of the screen (also in screenshot at right).
TIMECARD LOG ON TIME LIMIT

If you are logged on for a period of time with no activity, a flashing window will open with a message stating that your session is about to time out.

You must click Yes to continue the session where you left off.

**NOTE:** If you have entered data but have not saved it when this occurs, you will lose any data entered since you last saved. Always remember to save your data and log off if you are going to be away from the computer for any amount of time.

TO VIEW TIMECARD

An employee can view their timecard at anytime.

1. Logon to Kronos as described previously.

2. If you do not see your timecard, you can click the "Refresh" arrows and the page will reset to the default configuration.

3. To change the dates being viewed, choose from the **Time Period** drop down menu above the timecard.
VIEWING ACCRUALS

1. Logon to Kronos.

2. If you do not see the accruals widget, you can click the "Refresh" arrows on the "My Information" tab and the page will reset to the default configuration. The default location for the Accruals widget is in the lower right side of the screen.

3. In the As of field on the Accruals widget, select today’s date in the timecard.

4. In the Available Balance field, accrual balances are displayed.

5. You can display any widget in the full screen view by clicking the round gear icon and selecting "Pop-out."

6. If you have any questions or concerns regarding your balances, please contact your Office/Payroll Manager.

PRINTING THE TIMECARD

Multiple printing methods are available to you.

1. Press the "PrtScn" button on your keyboard and paste the just-copied image onto a document; you may print from the document.
2. Capture your timecard image with a screenshot program/tool on your computer.
3. Ask your Manager, Timekeeper, or Payroll Manager to print your timecard for you.

Always remember to log off from Kronos by clicking **Sign Out** in the upper left corner.
Section I – Non-Exempt Employees: Timekeeping Procedures

Time Off Requests

Submitting Time Off Requests

1. From the Employee Workspace, Click the Time Off Request (TOR) widget, located in the Related Items Pane.

2. Select a Time Period that includes the entire expected date(s) span for the TOR > Click Apply > Then click each desired day of the TOR.


4. Enter the following fields for your time off request.

   a. Start & End date(s) of TOR (contiguous workdays; up to 1 week increments only). If the TOR is more than 1 week in length, click to add a row per additional week. (NOTE: Only submit TORs for days you work. If your TOR spans a non-working day, submit multiple rows, so non-working days are excluded. If a non-working day is included in your date span, the Pay Code will be assigned to that non-working day.)

   b. Pay Code (Vacation or Sick; also Comp Time/CT if nonexempt employee).

   c. Start Time (8a or the regular start time of work day; for 9/80 employees, submit multiple rows to account for the different hours to be taken on certain work days).

   d. Length (number of hours per requested day of time off to be allocated to selected pay code).

   e. Type in pertinent details in the Notes box.

   f. Click “Draft” if you want to save the request and submit it later.

   g. Click “Submit” if you are ready to submit the request to your manager/supervisor.

5. The widget will now display your Requested Time Off (RTO).

6. The TOR submission process is now complete.
Viewing "My Current Requests"

The "My Current Requests" view in the Time Off Request (TOR) widget only displays the "Time Period" that you are viewing. A TOR will not display unless you have selected the time period on the calendar where the TOR exists, and have clicked "Apply" for that time period.

There are a number of different time period options in the drop down menu. You can also change the format of the "View Width" so that the time period displays in a Week, Month, or Multiple Months format.

1. Select a Time Period option.
2. If you selected "Range of Dates," you need to enter the dates.
3. Click Apply.
4. Any requests that exist within that Time Period will display in the "My Current Requests" view.

Visibility of TORs on the Employee Timecard

Approved TORs may not immediately flow onto an employee’s timecard; it depends on how far into the future the TOR exists on the calendar.

An Approved request that has flowed onto the timecard will have the accrual code and the number of hours listed twice.

An Approved request that has not yet flowed onto the timecard will only have the accrual code listed once.

Your manager can view your schedule to see hours that are scheduled to flow to your timecard but have not yet done so.
Section I – Non-Exempt Employees: Timekeeping Procedures

How to Retract a Submitted (Not Yet Approved) Time Off Request

a. Click the "Time Off Request" widget link.

b. Select a range of dates that will include the submitted request, and click Apply.

c. Click the "My Current Requests" link.

d. Check the box for the request that you wish to Retract.

e. Click the "Select an action" drop down menu and choose "Retract Request."

f. Click Apply.

g. The previously submitted request appears as "Retracted" and cannot be approved by the manager.

Cancelling or Changing an Approved Time Off Request and Removing Hours from Timecard

If your manager has approved a time off request and you wish to cancel the TOR or modify it, it is best to first submit a cancel request (same process as a retraction, but with the Cancel option). Then you should talk directly to your manager to have them modify the schedule so that any previously approved hours are properly removed from your schedule and your unused hours are properly returned to your accruals.
SECTION II

EXEMPT

EMPLOYEES
Section II - Exempt Employees: Timekeeping Procedures

Timekeeping Procedures

Leave Time Employees

Exempt Leave Time Employees will use a designated computer to record only time taken (i.e. vacation and sick leave) in full-shift increments in the Kronos system.

To access Kronos, open an internet browser and navigate to https://timekeeping.ucsb.edu. This will display the Timekeeping portal page which contains the link to accessing Kronos. Click the link to logon to Kronos.

This will open the Kronos logon page in a new window.

To log on to Kronos:
- Exempt employees use their UCSBnetID and password.
- If the system prompts you to remember your password, click No/Not for this site.
Recording Hours Taken

1. Log on to Kronos.
2. Find the day’s date and click in the Pay Code column.
3. Choose the correct pay code from the drop down menu.
4. Hit tab or click in the Amount column.
5. Enter the number of vacation or sick hours taken in 8-hour increments.
6. Click Save in the upper right corner of the timecard.
7. Log off from Kronos by clicking Sign Out in the upper left corner.

Adding a Row on the Timecard

Only employees who have the ability to manually enter their "Pay Code" and "Amount" of hours onto their timecard can add a row.

1. Click the row to which you want to add an additional row.
2. Click the "More" button.
3. Click "Add Row" in the drop down menu.
4. A new row is added, allowing you to enter a new "Pay Code" and "Amount" of hours. The "Date" of the new row is assumed by the row above it.

5. Click "Save" once you have entered in the Pay Code and Amount of hours.

**Adding a Comment on the Timecard**

Only employees who have the ability to manually enter their "Pay Code" and "Amount" of hours onto their timecard can add a comment in a populated field in the "Amount" row. To enter a comment, first enter the appropriate "Pay Code" and "Amount" of hours; then you can click on the "Amount" field and select "Comments."

1. Click the "Amount" cell.
2. Click "Comments."

3. Select an appropriate comment option and click the green plus sign to add in any further clarification.

4. Click OK.
5. You can hover your cursor over the newly created blue bubble and the entered comment will display in a small yellow box.

Required Approvals on the Timecard

The Exempt Employee pay period coincides with the calendar month. For example, the November pay period runs from November 1 through November 30.

After entering all leave taken during the pay period, the employee should approve their timecard for the entire pay period. *The timecard must be approved even if no leave was taken!*

1. To access the timecard, logon to Kronos.

2. If you do not see your timecard, you can click the "Refresh" arrows and the page will reset to the default configuration.

3. Verify the correct pay period is in view by checking the **Time Period** above the timecard.
   a. If the current date is on or before the end of the pay cycle, leave it as **Current Pay Period**.
   b. If the current date is after the end of the pay cycle, change it to **Previous Pay Period** by clicking the drop down arrow.

4. Scroll through the timecard to verify the information is correct; any discrepancies should be addressed with the manager prior to approval.

5. Click **More** above the timecard.

6. Choose **Approve**.

7. The upper left corner of the timecard will now display a *Timecard is Approved* message confirming the approval was made as of the indicated date stamp.

8. Log off from Kronos by clicking **Sign Out** in the upper left corner of the screen (also in screenshot at right).
Section II - Exempt Employees: Timekeeping Procedures

Viewing Accruals

1. Log on to Kronos.

2. If you do not see the accruals widget, you can click the "Refresh" arrows on the "My Information" tab and the page will reset to the default configuration. The default location for the Accruals widget is in the lower right side of the screen.

3. In the As of field on the Accruals widget, select today’s date in the timecard.

4. In the Available Balance field, accrual balances are displayed.

5. If you have any questions regarding your balances, please contact your Office/Payroll Manager.
**Timecard Logon Time Limit**

If you are logged on for a period of time with no activity, a flashing window will open with a message stating that your session is about to time out.

You must click Yes to continue the session where you left off.

**NOTE:** If you have entered data but have not saved it when this occurs, you will lose any data entered since you last saved. Always remember to save your data and log off if you are going to be away from the computer for any amount of time.

### Printing the Timecard

Multiple printing methods are available to you.

1. Press the "PrtScn" button on your keyboard and paste the just-copied image onto a document; you may print from the document.
2. Capture your timecard image with a screenshot program/tool on your computer.
3. Ask your Manager, Timekeeper, or Payroll Manager to print your timecard for you.

Always remember to log off from Kronos by clicking **Sign Out** in the upper left corner!
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1. From the Employee Workspace, Click the Time Off Request (TOR) widget, located in the Related Items Pane.

2. Select a Time Period that includes the entire expected date(s) span for the TOR > Click Apply > Then click each desired day of the TOR.


4. Enter the following fields for your time off request.
   a. Start and End date(s) of TOR (contiguous workdays; up to 1 week increments only). If the TOR is more than 1 week in length, click to add a row per additional week. (NOTE: Only submit TORs for days you work. If your TOR spans a non-working day, submit multiple rows, so non-working days are excluded. If a non-working day is included in your date span, the Pay Code will be assigned to that non-working day.)
   b. Pay Code (Vacation or Sick; also Comp Time/CT if nonexempt employee).
   c. Start Time (8a or the regular start time of work day; for 9/80 employees, submit multiple rows to account for the different hours to be taken on certain work days).
   d. Length (# of hours per requested day of time off to be allocated to selected pay code).
   e. Type in pertinent details in the Notes box.
   f. Click "Draft" if you want to save the request and submit it later.
   g. Click "Submit" if you are ready to submit the request to your manager/supervisor.

5. The widget will now display your Requested Time Off (RTO).

6. The TOR submission process is now complete.
Section II – Exempt Employees: Timekeeping Procedures

Viewing "My Current Requests"

The "My Current Requests" view in the Time Off Request (TOR) widget in Kronos only displays the "Time Period" that you are viewing. A TOR will not display unless you have selected the time period on the calendar where the TOR exists, and have clicked "Apply" for that time period.

There are a number of different time period options in the drop down menu. You can also change the format of the "View Width" so that the time period displays in a Week, Month, or Multiple Months format.

1. Select a Time Period option.
2. If you selected "Range of Dates," you need to enter the dates.
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4. Any requests that exist within that Time Period will display in the "My Current Requests" view.

Visibility of TORs on the Employee Timecard

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How to Retract a Submitted (Not Yet Approved) Time Off Request

a. Click the "Time Off Request" widget link.
b. Select a range of dates that will include the submitted request, and click Apply.
c. Click the "My Current Requests" link.
d. Check the box for the request that you wish to Retract.
e. Click the "Select an action" drop down menu and choose "Retract Request."
f. Click Apply.
g. The previously submitted request appears as "Retracted" and cannot be approved by the manager.

Cancelling or Changing an Approved Time Off Request and Removing Hours from the Timecard

If your manager has approved a TOR and you wish to cancel or modify it, it is best to first submit a cancel request (same process as a retraction, but with the Cancel option). Then you should talk directly to your manager to have them review/accept your cancel request and modify the schedule so that any previously approved hours are properly removed from your schedule and thus returned to your balance of accruals.
SECTION III
MANAGERS
Definition of a Kronos Manager

Managers are responsible for reconciling and approving time for all employees they directly supervise. As a manager you review, edit, and approve the timecard of the employees who are assigned to you.

Responsibilities include:

- **Reviewing hours entered – DAILY**
  - Missed punches
  - Unexcused absences
  - Late or Early punches (in or out)
  - Missing hours
  - Unscheduled work
  - Approving overtime

- **Reviewing hours entered – WEEKLY**
  - Ensuring each employee totals the correct number of hours (i.e. 100% time has 40 hours)
  - Ensuring all overtime has been reviewed

- Ensuring employee approvals are done per pay cycle
- Approving timecards at the end of each pay cycle

Managers should familiarize themselves with the different types of employees and time entry methods as documented in the Employee section of this manual. In addition, managers should remember that they are an employee as well as a manager and need to adhere to employee responsibilities for their own time.
A. "Workspaces" button – click this and then click "My Information" to view your own timecard.
B. "Alerts Notification Bar" – provides information on events needing your attention: specifically, missed punches and time-off requests. You can click these notifications to go directly to issues needing to be addressed.
C. "REFRESH" the displayed workspace by clicking this small icon. This will display any saved updates to data that are not yet visible. Clicking this refresh icon will also restore any widgets that have been closed.
D. "Editor Links" can be used to view groups of selected employees or individual employee records.
E. "Related Items" pane. Additional widgets are located here; also, when a tab on the left side of the screen is closed, it is available in this pane to be clicked on and opened.
F. "Employee Roster"/Quickfind Widget is used to search for individual employee records.
G. "Approve Timecards"/Pay Period Close Widget – used to review and approve timecards, individually or multiple at once, after addressing any errors/issues with them (defaults to Previous Pay Period).
H. "Reconcile Timecard" – used to review and resolve timecard errors in the Current Pay Period (or switching to other pay periods or date ranges is an option too).
I. "Search" function – allows you to perform quick searches of specific types of issues. This is a "reverse" search function.
Understanding Kronos Terminology and Functionality

**KRONOS USER ROLES**

**Employee:** One who needs to enter their exception time and/or time worked, either from a Timestamp or a timecard, and approves timecard.

*Corresponding departmental role:* Any employee who needs to track their time.

**Manager:** One who has access to view another’s timecard; may include responsibilities such as addressing timecard exceptions, and approving overtime and timecard.

*Corresponding departmental roles:* supervisor, manager, PI; anyone who views employees’ timecards.

**Timekeeper:** One who sets up new employees in Kronos, creates Kronos schedules (if used), and assists managers with their timecard activities, including transfer/allocation of hours to non-primary labor accounts.

*Corresponding departmental roles:* payroll analyst, payroll assistant, payroll processor.

**Payroll Manager:** One who signs off timecards for upload to Payroll. Any record without sign-off will not be included in the upload batch. The Payroll Manager also reviews Kronos upload reports after each payroll and accrual upload to PPS.

*Corresponding departmental roles:* payroll/personnel manager, the MSO/business officer, financial manager.

**System Administrator:** One responsible for managing Kronos configuration at the campus level; has full access to the system. No corresponding departmental role.

**KRONOS ACTIONS**

**Approval:** Action done by the Employee and Manager(s) to indicate an employee timecard is complete and acceptable for payroll processing.

*Corresponding paper timecard processing action:* Signing the paper timecard.

**Sign-off:** Action done by the Payroll Manager to prevent further timecard and schedule edits, and to indicate records are approved for payroll processing.

*Corresponding paper timecard processing action:* Certifies timecard data for entry into PPS.

**Transfer:** Allocation of hours to non-primary labor account(s). Typically used when an employee works in more than one job. Transfers can be automated using Percent Allocation Rules.

*Corresponding paper timecard processing action:* Assigning hours for split funding distributions.

**KRONOS TERMS**

**Access Control Number:** Number associated with a managerial position; used in Employee Group configuration to control who can view and approve an employee's timecard in Kronos. Each employee's Primary Labor Account string includes the Access Control number of the manager position associated with his/her primary job.

**Accrual:** For leave-eligible employees, the number of hours of accrued leave; commonly referred to as leave balances.

**Accrual Profile:** A coded collection of policies that determine how an employee accrues leave.

**Alerts and Notification Widget:** A box at the top of the Kronos page that shows alerts for issues that need to be addressed by a manager, timekeeper or payroll manager.

**Employee Group:** Determines the group of employees to which a manager has access. Employee groups are created and maintained by Kronos System Administrators.

**Function Access Profile:** Set of categories that controls what timekeeping functions a user can access in Kronos.
**HyperFind Query**: A query available in the Show menu on any of the Widgets that allows employee data to be filtered to get a subset of available records. Queries in the Show menu are either predefined Public queries created by the Kronos System Administrators, or Personal queries created by Timekeepers.

**Labor Account, Primary**: String of data associated with an employee's current home labor account assigned in PPS. The Primary Labor Account is the default account to which time is charged when no other account is specified.


**Labor Level Transfer Set**: Determines the labor account levels a manager or employee can use to transfer time; also is the list containing the available jobs an employee can clock-in or clock-out of.

**Pay Code**: A category used to organize time such as overtime or hours worked, or track nonproductive time such as leave. Examples include Vacation, Sick, ERIT, etc.

**Pay Rule**: A coded collection of rules that determines how employee time entries are calculated.

**Percent Allocation Rule**: A rule used to allocate time across multiple labor accounts based on selection criteria such as a labor account, job or pay codes.

**Primary Labor Account**: See “Labor Account, Primary”

**Punch**: A reference to the entry of In/Out times, taken from "punching" a time clock to indicate the time when work is started and ended.

**Related Items Pane**: A list of links to additional available widgets.

**Search**: A button on the upper right side of the screen that allows managers to perform searches on different database fields – with some predefined queries.

**Shift**: Time span between an IN and an OUT punch.

**Special Function Code**: Department-defined codes used for separating hours into different jobs; an optional component of the Primary Labor Account string.

**Time Off Request Widget**: Allows employees and managers to input, approve or disapprove time off requests.

**Widget**: A location containing a group of functions available for a user to perform (e.g. approving timecards, searching for employees, etc).

**Work Rule**: A combination of parameters defining breaks and overtime that determine the hours an employee is paid and accrues.

**Workspaces**: A location with role-specific collections of widgets. The user interface includes a dropdown menu that allows users with a Kronos Manager License to switch between their employee and manager roles as needed.
Managing Timecards/Widget Navigation

Employee Roster Widget (also known as Quickfind)

The Employee Roster Widget/QuickFind allows you to quickly access your employees and can be opened via the Related Items pane.

To generate a list of all employees, leave the Name or ID field with only the * in it and click the blue Find button.

You can limit your results by doing either of the following steps followed by clicking the Find button.

- Typing all or part of an employee’s last name before the * (i.e. smi* for Smith); OR,
- Typing a ? to indicate an unknown value that is supposed to be present (e.g. searching for k??n, g* because you can’t remember employee Genghis Khan’s exact spelling of his name).

Once the results are displayed, you can sort them by clicking on the column headings. You can sort on multiple columns; the last column chosen will determine the primary sorting order (as seen by "2" in the Name column and "1" in the Pay Rule column on the image below).

Choose an employee by clicking once on their name. You can choose more than one employee through one of the following methods.

- To select non-adjacent employees, choose the first employee, hold down the Ctrl key and choose the next employee.
- To select adjacent employees, choose the first employee, hold down the Shift key and choose the last employee. All employees in between will also be selected.
- Another way to select adjacent employees is to click the name at the top of the list and drag to the last name. This will select all employees in between.
- To select all employees, go to the Actions menu and choose Select All, or click one employee and press the Ctrl key + A simultaneously.

Once your selection is made, click on the desired Editor Link (further details on following pages).
**Timecard Editor Link**

The Timecard Editor link will open up one or more employees’ timecards that were selected in a widget (such as the Employee Roster widget). When the timecard(s) appears, select the appropriate time period from the Time Period drop-down list; depending on the type of employee selected, the timecard may display the following.

Start and stop times (for time clock and time stamp employees):

![Timecard Editor](image1)

Total hours worked/leave taken for the day (for Time Duration or Leave Time employees):

![Timecard Editor](image2)
Timecard Indicators and Colors

The appearance of the timecard cells changes to indicate a number of different conditions, called Exceptions. The causes of and corrections for these Exceptions will be explained under **Editing Timecards**.

<table>
<thead>
<tr>
<th>Description</th>
<th>Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>This button allows you to clear the row’s contents.</td>
<td>![Clear button]</td>
</tr>
<tr>
<td>This button allows you to add an additional row for the day.</td>
<td>![Add button]</td>
</tr>
<tr>
<td>If neither button shows to the left of the date, the employee is either not active on that day or the timecard has been Signed Off. No edits can be made; see your Timekeeper.</td>
<td>![Timecard content]</td>
</tr>
<tr>
<td>A solid red cell indicates a missed in-punch or a missed out-punch. If you hover your cursor over a red cell (called a mouse-over) the system will define the problem.</td>
<td>![Missed In-Punch]</td>
</tr>
<tr>
<td>A red outline around a cell indicates an exception. If you hover your cursor over the cell, a message provides more information. Examples of exceptions include:</td>
<td>![Exception Indicator]</td>
</tr>
<tr>
<td>• A late or early punch as compared to a schedule.</td>
<td>![8:00AM]</td>
</tr>
<tr>
<td>• Unscheduled hours.</td>
<td>![Unscheduled]</td>
</tr>
<tr>
<td>A green outline around a cell indicates the exception has been reviewed.</td>
<td>![2:33PM]</td>
</tr>
<tr>
<td>A small yellow icon (resembling a Post-It note) in the upper right corner of a cell indicates a comment has been added. To view, see the Comments tab.</td>
<td>![5:15PM]</td>
</tr>
<tr>
<td>A red outline around the date indicates an unexcused absence.</td>
<td>![Fri 3/07 Absent]</td>
</tr>
<tr>
<td>A blue outline around the date indicates an excused absence.</td>
<td>![Fri 3/07 Excused]</td>
</tr>
<tr>
<td>A transaction shown in purple indicates it was added by the system.</td>
<td>![Cesar Chavez... 8.0]</td>
</tr>
<tr>
<td>Except for Holidays, changes must be made in the Schedule Editor.</td>
<td>![Transaction]</td>
</tr>
<tr>
<td>An (x) before a labor account in between punches or in the Totals section of the timecard indicates that the account is not the home labor account for the employee (indicates a transfer to a department other than the home department).</td>
<td>![760]</td>
</tr>
</tbody>
</table>
Schedule Editor Link

The Schedule Editor Link will open up an employee’s schedule to assist managers in proactively tracking employee hours worked. Schedules are capable of automatically allocating hours worked to different labor accounts, as well as handling non-traditional work patterns. Schedules are optional in Kronos but are necessary if a manager needs to restrict an employee(s) to a fixed, unvarying set of workable hours/shifts.

To Add a Schedule That Changes Weekly

1. Open the desired timecard(s) within any widget.
2. Click the "Schedule" editor link.
3. Select the appropriate range of dates from the Time Period drop down list.
4. Click in each appropriate cell and type the start and end times of the shifts. (*note – use military time or "p" for pm).
5. Click Save.

To Add a New Schedule Pattern for an Employee

1. Select the employee(s) within any widget.
2. Click the "Schedule" timecard editor link.
3. Right click on the employee’s name and hover over "Add Pattern."
4. Select "Shift or Pay Code."
5. Enter Work Start date and Pattern Start Date (these two dates should be the same as the Pay Period Start Date).
6. Click in the appropriate cell and add schedule (*note – use military time or "p" for pm) to the pattern editor.
7. Click on forever or enter an end date.
8. Click OK.
9. Click Save.
Sample Schedule Pattern of an Employee Who Works a 9/80

1. Select the employee(s) within any widget.
2. Click the "Schedule" timecard editor link.
3. Right click on the employee’s name and hover over "Add Pattern."
4. Select "Shift or Pay Code."
5. Enter Work Start date and Pattern Start Date (these two dates should be the same as the Time Period Start Date).
6. Click in the appropriate cell and add schedule (*note – use military time or "p" for pm) to the pattern editor.
7. Click on the → to add another line (copy and paste hours from week 1 to fill in the days of week 2).
8. Click on forever or enter an end date
9. Click OK .
10. Click Save.

How to Edit a Schedule Pattern

1. Open the desired timecard(s) through the desired widget.
2. Click the "Schedule" timecard editor link.
3. Right click → edit pattern → Shift or pay code.
4. Edit the pattern.
5. Enter end date.
6. Click OK.
7. Click Save.
How to Transfer a Scheduled Shift to a Different Labor Account

1. Open the desired timecard(s) through the desired widget.
2. Click the "Schedule" timecard editor link.
3. Right click the specific work shift, mouse over the edit link, and click "Shift".
4. In the Transfer cell, click "Search" and select a Primary Labor Account (you need to know which labor account to select), click OK.
5. Click OK on the "Edit Shift" window once the labor account is entered into the transfer field.
6. The (x) shows the shift is transferred to a different account.
7. Click Save.

### People Editor Link

The People Editor Link will open up an employee’s People Record (account profile) for review. Managers do not have editing rights/abilities in this area, with the one exception of the below procedure for "unlocking" a reporting employee’s Kronos Account whenever they unsuccessfully attempt to login too many times to Kronos.

#### How to Unlock an Employee’s Kronos Account

1. Click the People Editor link.
2. Click "User Information" within the Person tab.
3. Uncheck the "Account Locked" box, if it is checked.
4. Click Save.
Reports Editor Link

The Reports Editor link will let you view many pre-defined reports for selected employees.

Navigating Reports

1. Available reports are grouped by category. Clicking on the name of a report will show options and a description in the right-hand section of the screen. Options vary from report to report.
2. Once your settings are in place, click the Run Report button.
3. The report completion status will not automatically refresh, so you will need to click the Refresh Status button. When the report is ready for viewing, the Status will show as Complete.
4. To view the report, either double-click the report name or select it and click the View Report button. The report will open in a new window.

5. To print, use the PDF program that opened the report, or use your internet browser’s print option (if applicable). After the report prints, close the report window by clicking the PDF reader to return to Kronos.

6. Additional report samples are available on the next two pages.
Two Report Samples and How to Interpret Them (details noted where necessary)

ACCRUAL DETAIL REPORT

Most commonly used to reconcile leave accrual balances and confirm accuracy of manual accrual updates in Kronos.

1. Employee Name
2. Employee ID number
3. Amount of Accrual Grant Earned
4. (D) = Disqualified grant amount; when Kronos reviews a potential grant and determines it to be against HR policy, it disqualifies the potential grant but still notes it on this report for backup documentation purposes.
5. This line item shows a manual input of CT Taken hours on behalf of this employee; anytime a manual accrual update occurs in Kronos, a line item like this is generated on the Accrual Detail Report.
EMPLOYEE HOURS BY LABOR ACCOUNT REPORT

Most commonly used to track hours worked on specific projects/locations for budgetary planning and back-up documentation. To set up this report:

1. Select it from the available list.
2. Select the needed range of dates/time period.
3. Then select either all of the available pay codes to display in the report, or just select ones, using the single arrow for single pay codes or the double arrow for all pay codes.
4. Select Microsoft Excel Document (.xls)
5. Click Run Report. Once the report displays, it should look like the screenshot below.
Section III – Managers: Editing Timecards

Editing Timecards

Because the previously-mentioned four editor links enable managers to access and modify timecard data, it is essential to know how to correctly modify/edit timecards. It is important to remember the following information when editing timecards.

Any changes made to a timecard will not be permanent (or added to the audit trail) until they are saved. You can tell there is unsaved data when the word Timecard in the upper left corner is orange and preceded by an * and/or there is a red flag on the Totals & Schedule tab.

To check how changes will affect timecard totals prior to saving, go to Actions → Calculate Totals.

To undo changes and/or go back, go to Actions → Refresh. A warning message will appear to make sure you are aware that proceeding will erase all changes made since you last saved.

If all changes are correct, click Save on the menu bar. If you try to navigate away from the current page when there is unsaved data, a warning will pop up to make sure you do not lose your changes.

The following edits can be made in an employee’s timecard:

- Adding comments (with or without notes)
- Correcting a missed punch
- Editing an existing punch
- Deleting an extraneous punch
- Adding a meal deduction
- Adding leave
- Marking an exception as reviewed
Adding Comments

Comments can be added to an in-punch, out-punch, or pay code amount. Comments are predefined, but a note can be added to it.

1. Right Click the appropriate cell on which you wish to place a comment.

2. Choose Add Comment…

3. The Add Comment dialog box opens; you can select a comment.

4. Type in an appropriate note as needed in the Note box.

5. Click OK.

6. You should see the yellow comment icon in the cell.

7. Click Save (see upper left section of timecard).

8. Click on the comment tab at the bottom of the timecard to view all comments for that period’s timecard.

NOTE: The Comment menu has the option to Add Note, but this can only be done if a comment has already been added.

Correcting a Missed Punch

1. Verify with the employee why the punch was missed and what time should have been recorded.

2. Click in the red cell where the punch is missing.

3. Enter the time (NOTE: Kronos uses 24-hour time, meaning afternoon times must be designated as pm. For example, 2:30pm needs to be entered as either 230p or 1430.)

4. Add the appropriate comment to justify the edit.

5. Click Save.
Editing an Existing Punch

Always be sure to add a comment and note why the pay code edit was made.

Existing timecard punches may need to be edited for different reasons, including overriding the designation of a punch, cancelling automatic meal deductions, and marking exceptions as reviewed.

To access the punch editor, go to the Punch menu and choose Edit, or right-click on the punch and choose Edit Punch…

The following are available in the Override menu through Edit Punch:

1. **In punch** – changes a punch designated as an out-punch and sets it as an in-punch.
2. **Out punch** – changes a punch designated as an in-punch and sets it as an out-punch.
3. **New shift** – used when an employee has more than one shift in a day which needs to be totaled separately.
4. **30/45/60/90 Minute Lunch** – used only in specific instances to combine separated shifts.

Deleting an Inappropriate Punch

Deleting a punch from a timecard is *strongly discouraged* because these punches reflect actual times an employee worked. However, some exceptions to this rule occur. For example, an employee might accidentally punch when logging on to approve the timecard. If this occurs, you can delete the extraneous punch. Remember all edits to a timecard – including deleted punches – are tracked in the Audits tab of the employee’s timecard.

BEST PRACTICE: Before you delete a punch, add a comment and note to it, providing documentation as to why the punch was deleted. You cannot add a comment to a punch once it has been deleted.

To delete a punch:

1. Click in the cell that contains the punch you want to delete.
2. Select **Comment → Add** from the menu bar or Right-click and select Add Comment….
3. Select one or more comments from the list.
4. Type in a note to explain why the punch is being deleted.
5. Click OK.
6. Select **Save**.
7. Verify that the cursor is in the cell that contains the punch you want to delete.
8. Press Delete.
9. Select **Save**.
Adding a Meal Deduction

Automatic meal deductions usually take place after an employee has worked more than 6 continuous hours without clocking out; deductions will not happen until the employee reaches 6.25 hours. If a deduction needs to be made on a shift that is 6 hours or less, it must be entered manually.

This employee came in after a doctor’s appointment but still took a one-hour lunch break at noon. To enter the break:

1. Click in the 2nd in cell and enter the time the meal period ended – LUNCH RETURN TIME.
2. Click in the 2nd out cell and enter the time the meal period started – LUNCH START TIME.
3. Click Save.
4. The system will put the punches in the correct order:

   This may appear backwards – but you are, in fact, entering the times the employee left for lunch in the "out" cell and the time the employee came back in the "in" cell.
Adding Leave

To enter time off (i.e. sick, vacation or comp time taken), select a pay code that describes the time not worked using the drop down selection. Then enter the appropriate amount of time to apply to that pay code. You must enter the time in decimal quarter-hour increments (0.25, 0.5, 0.75, 8.0, etc).

Leave cannot be entered on the same line in which punches exist – a separate line will need to be added by clicking the arrow button to the left of the date in which the time was taken.

TIP: To get to pay codes lower in the list, type the first letter of the pay code and you will be moved down the list.

If leave involves Leave No Salary, Disability, or Workers Compensation, please contact your Timekeeper.

Entering leave will clear an unexcused absence exception changing the cell outline from red to blue.

Marking an Exception as Reviewed

If a punch is outlined in red (flagged as Early/Late In, Early/Late Out, Unscheduled, etc) and has been reviewed, choose the Mark as Reviewed option from the punch menu. The outline will change from red to green.

After making any edits, be sure to click Save!

Additional Notes

- Full-Time (100%) employees should total 40 hours per week; employees at less than 100% should account for that percentage of hours each week (i.e. 80% employees should have 32 hours).

- Shifts worked on normal days off do not need to total 8 hours – do not add Sick, Vacation or CT Taken to total 8 hours for the day; all time on that day should be overtime or comp time.

- Student and Limited employees need not total 8 hours in a day; to clear excused absences, put proper pay code with 0.0 hours.

Printing a Timecard

Only managers, timekeepers and payroll managers are able to print timecards directly from Kronos; to do so, use one or more of the four available methods below.

1. From Employee Roster/Quickfind, Approve Timecards, Reconcile Timecard, or the Pay Period Close widget, click Actions and then Print (or Print Screen).
2. Press the "PrtScn" button on your keyboard and paste the just-copied image onto a document; you may print from the document.
3. Capture the timecard image with a screenshot program/tool on your computer.
4. Alternatively, employee timecards can be printed from the Reports area by choosing the "Time Detail" report in the Detail Genie category of reports.
Approving Overtime

Overtime must be approved per day in Kronos. It will appear as Unapproved Time until it is approved. Overtime approval is only possible from within the employee timecard view, accessible from the following widgets: Approve Timecards, Employee Roster/Quickfind, Pay Period Close, Reconcile Timecard & Review Missed Punches.

From within the employee timecard view, perform the following steps to approve overtime:

1. Determine on which day(s) overtime occurred by utilizing the Totals & Schedule tab, set to Daily view, and clicking each weekday to view daily hour totals for any Unapproved Time (often occurs on days with greater than 8 hours worked and/or at the end of each work week).

2. Click on the day in which the unapproved time (overtime) occurred.

3. Go to the Approvals menu and choose Approve Overtime.

4. The "Approve Overtime window will open:

5. You have the choice to approve All, None, or Some of the overtime. You can only make one selection here. If you choose to approve Some*, enter the approved Amount in the lower box (6).

6. If you have chosen "Some" you must enter the amount of overtime you are approving in this field.

7. If you add a Comment through the Approve Overtime window, the comment icon will not show on the timecard. If you want the icon to show, you must add the Comment on the punch instead of through the Approve Overtime function.

8. After making your selection, click OK (any remaining unapproved time will not upload for payroll purposes. Be cautious with not approving, as this may create a labor issue if the employee contests the denial).

9. After completing all overtime approvals, click Save to complete the process. The save button is at the top of the timecard.
Section III – Managers: Reviewing Missed Punches

Reviewing Missed Punches

Managers can also use the Review Missed Punches widget (from the Manage Employee Time workspace) to focus in on specific employees who need to have certain payroll-inhibiting errors corrected prior to timecard approval.

To access the widget, click on the gear icon and select Pop-out.

The widget will display all currently outstanding punch errors, unscheduled shifts, etc., in a convenient format for the manager to review and resolve. The solid red box (see out punch on Fri 2/7, below) indicates a missed punch, while the red text in the Amount and In/Out columns means a shift was unscheduled and needs to be reviewed.

![Review Missed Punches Widget](image)

**Correction Buttons**

Similar to the procedures listed in prior pages, correct timecard errors in this widget as follows:

1. Click the cell of the error.
2. Click the related correction button. (The button will become highlighted after you click the errored cell, e.g., Mark as Reviewed, Comment, Add Punch, Remove, etc.)
3. Input the correct values.
4. Click Save.

Depending on the volume of errors to resolve, associated deadlines, and the nature of the edits a manager needs to complete, this widget can serve as a useful tool to identify and resolve timecard errors efficiently.

Additionally, this widget can be accessed directly from the Alerts Bar, whenever missed punches need to be reviewed in the Current Pay Period (screenshot at right shows the orange-highlighted link on the Alerts Bar).
Approving Timecards

Employees must approve their own timecard for each pay cycle. Employees should be careful to approve the correct pay cycle (e.g., Previous Pay Period if it is after the pay cycle end date). An employee approves their own timecard to indicate agreement with the reported time.

**It is the manager’s responsibility to make sure his or her employees have approved their timecards. Managers should not approve the timecard without the employee’s approval.** Certain exceptions are allowed. In extenuating circumstances the manager may approve the timecard without the employee’s approval, but the timecard should be printed out for the employee to physically sign. The signed timecard should be filed in the employee’s personnel file.

Managers must also approve their employee’s timecards by the specified deadline (which varies per pay cycle), but only after the employee has approved.

NOTE: No manager may remove an employee’s or another manager’s approval.

Employees fall into three different pay cycles:

- The pay cycle for Exempt employees corresponds with the calendar month; for example, November runs from November 1 through November 30. Employees should approve their own timecards on the first few days of the month and the manager should approve after that.
- Many positive pay employees have a monthly pay cycle also, but their pay periods run from the 16th of one month through the 15th of the next, with the associated pay date being the first of each month following the most recent pay period.
- Non Exempt employees have a bi-weekly pay cycle. Due to the frequency, there may only be one or two days for employees and then managers to approve timecards before payroll upload.

Please work closely with your Timekeeper to ensure all deadlines are met.

TO APPROVE TIMECARDS

The easiest way to find employees ready for approval is through the Reconcile Timecard or Approve Timecards/Pay Period Close widgets. From within either of those widgets:

1. Click on the column heading for Employee Approval to sort by who has and who has not approved the timecard.
2. Select records with a check in the Employee Approval column.
3. Click on the Timecard editor link.
4. On the first employee, scroll through the entire month to make sure everything is correct.
5. Once everything is correct, go to the Approvals menu and choose **Approve**.
6. Click the right arrow to go to the next employee.

**Note regarding batch approval capability:** A manager may also batch approve timecards that have already been reviewed for completeness and accuracy. To do this, they must access the relevant employees via any of the following widgets: Employee Roster/Quickfind, Approve Timecards/Pay Period Close, or Approvals Summary. Once all of the relevant employees have been selected, repeat Step 5 above and select approve for the employees.
Section III – Managers: Approve Timecards Widget

Approve Timecards Widget

Click on “Approve Timecards” widget link.

a. A timecard that an employee has approved. You can choose to review the timecard, as needed, by double clicking on the name.

b. Employees whose timecards have no check in the "Employee Approval" column need to be contacted to request that they approve their timecard online or via timeclock. You shouldn’t approve the timecard until they have approved it.

c. A check in the "Missed Punch" column indicates that you need to review this timecard for an issue. The employee has forgotten to punch in or out at some point. The issue needs to be corrected by a manager before employee approval.

Double click on the employee name to review their timecard.

d. A solid red line around a clock-in time indicates an exception, clock-in was unscheduled.

e. A solid red box in a clock in or out box indicates the employee forgot to punch in/out. You should talk to the employee to determine the time that they clocked in or out. Then you can click on this box and enter the time. For instance, 4p or 4:08p.m.

f. You can right-click on the unscheduled box and add a comment, edit the punch time, or mark as reviewed. Any time you edit a punch or enter a time for a missed punch, you should right click on the time and enter a comment which justifies the change.
Section III – Managers: Approve Timecards Widget

g. The previously "Unscheduled" time has been marked as reviewed.
h. A comment has been entered after typing in 5p or 5pm to justify the modified timecard.

<table>
<thead>
<tr>
<th>Date</th>
<th>In</th>
<th>Transfer</th>
<th>Out</th>
<th>In</th>
<th>Transfer</th>
<th>Out</th>
<th>Shift</th>
<th>Daily</th>
<th>Cumul.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tue 4/22</td>
<td>1:00AM</td>
<td></td>
<td></td>
<td>4:00PM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tue 4/22</td>
<td>4:00PM</td>
<td>6:00PM</td>
<td>1:00AM</td>
<td>5:00PM</td>
<td>1:00AM</td>
<td>7:00PM</td>
<td></td>
<td></td>
<td>15.50</td>
</tr>
</tbody>
</table>

i. The 1:00AM time punch is an improper punch which you can address by clicking on the 1:00AM time and pressing delete. Then click the "Actions" drop down menu and choose "Calculate totals." If you do make an error, you can choose "Refresh" from this menu to revert your change. You could also click "Save" but you lose the chance to revert your change.

j. Now all unscheduled times have been "Marked as Reviewed" and comments have been added to each "Missed Out-Punch" that was corrected in the Out column.
Approve Timecards

k. After saving changes to any individual employee timecards, click the small "Refresh" icon on the "Approve Timecards" tab, or the "Review and Approve Timecards" button, to return to the "Pay Period Close" page.

l. Select Employee-Approved timecards by pressing the CTRL key and the left mouse button on each timecard. Or you could click and drag the mouse to select them all.

m. To Approve, click the "Approvals" drop down menu and click "Approve."

n. Pressing the "Clear" button is required to set up a fresh Approve Timecards instance for the next timecard approval period.

o. When you press clear, this pop-up will appear. Click OK.

p. The screen will now display the timecards that you have approved with a "1" in the "Manager Approval" column. You can still approve other timecards if necessary.
Using the Time Off Request (TOR) Widget and Approving a Request

1. Whenever a Manager has a TOR requiring action, the Alerts bar will indicate this with the icon at right. Click this icon to resolve outstanding TORs.

2. Click the Time-Off link with the red octagon & exclamation mark.

3. All unapproved TORs will now display for review as in the screenshot below. Managers may click any of the requests and use the TOR management buttons (a-g below) to resolve each one.

The TOR Management Buttons (a-g above) perform the following functions:

a. Details: Shows a more detailed summary of the request information.

b. Edit: Updates a TOR status, but not the details of the TOR; refer to "c" for further edits

c. Approve: Approves a time off request and provides editing capability.

d. Refuse: Refuses a TOR

e. Pending: Sets the request to the Pending state that can be approved/edited later.

f. Retract: Retracts a TOR, requires you to remove the Pay Code(s) in the schedule editor.

g. Request Time Off: Creates a new TOR. You can submit requests for your employees.

Additionally, there are several types of TORs displayed in the screenshot above, as identified by the "Status" heading. The "Submitted" status requests are waiting action by the manager. The "Pending" status indicates that the manager has marked the request as pending for later review. The "Cancel Submitted" status indicates that an employee has attempted to cancel a previously approved TOR. Make sure to resolve any "Cancel Submitted" requests using the TOR management buttons, after which it is recommended that you use the Schedule Editor, which will be described later in this section.

4. To Approve a TOR, click TOR Management Button c above (labeled "Approve"), add any Comments/Notes (if needed), and click Approve.

5. The TOR approval process is now complete. Any approved time will have appeared on the employee’s schedule.

Read on for more information on making edits to requests and using the schedule editor.
Section III – Managers: Time Off Requests

Editing a Submitted TOR Before Approval

If a TOR has been submitted but needs to be modified, the manager can make modifications to it during the approval process.

1. Click the specific TOR in the Manage Time Off Requests widget that you wish to modify and approve. You can only modify requests that you are able to Approve.

2. Click Approve (not edit).

3. The user will be presented with the following box. Click the blue Edit header.

4. Modify Start or End Dates, Pay Code, Start time, and Length of time (refers to the number of hours per day to deduct on the timecard).

5. Clicking the "Add another time-off period" allows you to end one part of the TOR before the weekend and then start another line when the work week starts again. Otherwise accrual hours will be deducted for each of the weekend days.

6. Click the Approve button when done. If further edits or changes are needed after clicking Approve, those can be performed by looking at the employee’s schedule as detailed on the next page.
Using Schedule Editor to Modify or Remove TOR Hours from a Timecard Schedule

What is the Schedule Editor?

The Schedule Editor is a tool used to ensure that scheduled hours are correctly accounted for on employee timecards.

When should the Schedule Editor be used?

In certain situations, TOR hours (vacation, sick, or CT) may not yet be visible on the timecard of the employee, and the hours need to be verified, possibly adjusted. Alternately, when a TOR has been approved by a manager and hours have flowed onto the timecard but the employee did not actually take the time off, the manager needs to correct the deducted amounts. A manager should use the Schedule Editor to fix any of those issues.

How do I use the Schedule Editor to remove (or adjust) an approved TOR that's on a timecard?

Managers, Timekeepers, and Payroll Managers have the capability to perform this action with the Schedule Editor. These directions are written from a manager’s point of view.

1. Find the employee via Quickfind or through a query in the Reconcile Timecard view.
2. Click on the employee and then click “Schedule.”
3. You may need to choose a specific “Range of Dates” to find the particular days for which the TOR was submitted.
4. Once you have the correct range of dates, which show the particular TOR(s), you can right click on any hours that need to be adjusted/deleted and select the appropriate option (Delete, for this example). If an employee took less time for an appointment you could click "Edit" to adjust the hours.

5. The hours have now been deleted from the schedule and shouldn’t be visible on the time card.

6. Click Save.

7. This use of the Schedule Editor is advised, as needed, anytime an employee wants to revise an approved TOR, is not able to use the previously scheduled TOR, or can't ask for the needed TOR change due to sickness or some other reason. While this process does remove the time from the time card, the actual TOR will still appear as an approved request for the employee and the manager; so the historical information about a TOR stays for your reference even after adjustments are made on the schedule (screenshots below).

Manager View:

Employee View:
Managers can create Hyperfind Queries to search more precisely for employee data by following the steps below:

Creating a Hyperfind Query

1. Click the Setup link on the right side of the screen.

2. Click Hyperfind Queries.

3. Click New.

4. Add sample filter #1 to query as follows.
   a. Click Primary Account (under Filters, left side).
   b. Click radio button for Access Control (right side).
   c. Search for the relevant access control number in the search bar (you can type the first number with an * and then search).
   d. Click the correct access control number to be filtered by this query.
   e. Click Add – the number will appear in the "Access Control" field.
   f. Click Add Condition.
   g. The filter criteria will now display in Selected Conditions at the bottom of the screen.
5. Add sample filter #2 to query as follows.
   a. Click the Employment Status filter.
   b. Click Add Condition.
   c. The filter criteria will now display in Selected Conditions at the bottom of the screen.

6. Click the Save button.
7. In the "Save Query As" window, select the "Personal – visible only to me" option. Type in a name for the query, a description, and click OK.

Making Your Query Visible to Others

Now that your query is complete, you can make it visible to others – whomever may need the query.

1. From the within the Hyperfind Queries view, you can click the "Common Setup" link and then click the "Query Manager" link.

2. Click the "Find" button, select the query you created, and click Assign.
3. Search for and select the name of the manager/employee to whom you are assigning viewing access to this query. Click OK.

4. Now that the employee has been assigned the query, they (and you, the query creator) can utilize the query in available widgets (e.g. Pay Period Close) to refine the list of available employees to review. Simply select the query in the “Show” field.
SECTION IV
TIMEKEEPERS
Definition of a Kronos Timekeeper

Timekeepers, also known as Payroll and Office Managers, are responsible for ensuring proper setup and payment of employees. They assist managers with reconciling timecards and serve as the Kronos contact person for their department.

Responsibilities include:

- Hiring paperwork
- Entering to PPS
- Setting up employees in Kronos (People Record)
- Entering schedules
- Reviewing hours entered (working with manager) – every week
  - Missed punches
  - Unexcused absences
  - Late or Early punches (in or out)
  - Unscheduled work
  - Unapproved overtime
  - Ensuring 40 hours for Career FTE
- Transferring time for students working more than one job/department
- Ensuring overtime procedures are followed
- Making sure employee approvals are completed at the end of each pay cycle
- Reviewing Kronos upload reports after each payroll and accrual upload

Timekeepers should familiarize themselves with the different types of employees and time entry methods as documented in the Employee section of this manual. They should also be aware of the Manager duties as outlined in the Manager section. Timekeepers should only perform the Manager duties for employees they directly supervise.

** For information regarding navigation throughout the Kronos application, please refer to the Manager section.
Setting Up Employees

Overview

The purpose of this task is to set up a new employee in Kronos. A new employee record will be created in Kronos for all staff the day after they have an active UCSB NetID and are entered into the Payroll and Personnel System, hereafter referred to as PPS.

Kronos imports employee data every morning from PPS. Data changes are dependent on a successful PPS refresh the night before. If a new employee or changes to an existing employee do not show up within a day, please contact your Kronos Payroll Manager.

Timekeepers will edit the employee record and inform the employee regarding appropriate information needed for clock use, pay rules, schedules, badge, labor account information and accruals.

Steps

1. **Use the Employee Roster/QuickFind widget to find employees who need to be set up:** Enter your search criteria in the Name or ID box and click Find. Click on the desired name and click the People Editor link in the upper left corner.

2. **Side bar for Person Tab:** From the sidebar (left inside the workspace), you will select Person Summary, Licenses, General Information, Accruals & Leave, User Information, Contacts, and Additional Information to enter basic information.

3. **Side bar for Job Assignment Tab:** From the sidebar (left inside the workspace), you will select Job Assignment Summary, Primary Account, Timekeeper, Access Profiles, and Employee Role to enter basic information. If the employee has a Manager license, there will be one additional option: Manager Role – General.

On a daily basis, employee data is imported from PPS into Kronos. The fields that will be imported from PPS are: ID, First Name, Middle Initial (if entered in PPS), Last Name, Hire Date, Wage (student and limited employees only), Labor Account information, and some other essential data used by Kronos to automatically configure default elements of new or rehired employees. Further details are described on the following pages.
People Editor Menu Bar

There are three options on the People Editor Menu Bar: **Save**, **Actions**, and **History**. Clicking **Actions** or **History** will bring up a list of choices.

- **Save** should be used any time changes are made and need to be saved. Remember that clicking **Save** adds your actions to the audit trail.
- **Actions** → **Refresh** should be used to cancel edits that you made but do not want to save.
- **Actions** → **Refresh Data** is only if a change has been made in the Setup of the application.
- **Actions** → **Print Screen** can be used to print the current screen.
- **History** → **Employment Status** shows historical changes to the employee’s employment status. Uses for this will be detailed under **General Information** of the Person Tab.
- **History** → **User Account Status** shows the history of the employee’s user account status.
- **History** → **Primary Account** shows historical changes to the employee’s primary labor account. Uses for this will be detailed under **Primary Account** of the Job Assignment Tab.
- **History** → **Pay Rule** shows historical changes to the employee’s pay rule.
- **History** → **Base Wage** shows historical changes to the employee’s base wage.
- **History** → **Generic Data Access Profile (GDAP)**: shows historical changes to the employee’s GDAP.

**Person Tab**

1. **Person Summary** – read-only summary of information from Person Tab
2. **Licenses** – there are two categories with different license options:

*Suite Product Licenses* – gives employees a time record in the system

  - **Workforce Timekeeper** – should be checked for all employees. *In this instance, "Timekeeper" refers to the employee’s ability to keep his own time and is not related to the Timekeeper (Office Manager) role as defined in this manual.*

*Suite Interaction Licenses* – gives employees access to the Web based Kronos application

  - **Workforce Manager** – should be checked for anyone who needs visibility over another person’s timecard due to having managerial-related responsibilities. Also needs to be checked for Timekeepers and Payroll Managers.

  - **Workforce Employee** – should be checked for all employees.

*Workforce MobileManager, Workforce TabletManager, Workforce TabletAnalytics, Workforce MobileEmployee, and Workforce TabletEmployee* are not currently in use, but may be available in the future.
3. **General Information** – can be used to modify an employee’s personnel information; most fields are automatically filled in from PPS. Fields include (asterisk (*) = required field):

* **Last Name** – limited to 30 characters. Automatically populated by and must correspond to PPS.
* **First Name** – limited to 30 characters. Automatically populated by and must correspond to PPS.
* **Middle** - limited to 1 character, to be used to distinguish between employees with the same first and last name. Will be populated into Kronos if entered in PPS.
* **Short Name** – a unique name, limited to 20 characters. If you leave this blank, the system enters the first 20 characters of the First Name.
* **ID** – Employee Identification number as assigned by PPS. Automatically populated by and must correspond to PPS.
* **Birth Date** – not automatically populated nor required.
* **Hire Date** – this date is supplied by PPS and is a required entry. This date can affect the Employment Status effective date. This should never be changed (even if employee is re-hired with a new date).

**Employment Status** work box – allows for changing the employment status and/or the effective date. This will need to be changed if an employee shows incorrectly as terminated for a period of time.

**IMPORTANT TIP:** If there is an un-editable period on the employee’s timecard yet you know the employee was active during that period, it is possible the system thinks the employee was terminated. To correct, check employee’s **Employment Status History** in the People Editor.

- Choose **History** on the menu bar and select Employment Status.
- Click the Start Date column heading once to sort the dates chronologically.
- Note the dates it shows as Terminated – it probably overlaps the un-editable dates on the timecard.
- Click OK.
- To fix, go to the Employment Status work box.
- Click the second line in the work box under Employment Status and choose Active from the drop-down menu.
- In the Effective Date cell, choose the date for which the employee was re-activated.
- Click Save on the menu bar to save your changes.
- Back on the timecard you may need to use Actions ➔ Refresh to reset the un-editable days.
4. **Accruals & Leave** – determines employee accrual grant amounts. Rules are defined based on union status and years of service and must correspond to the leave code in PPS. There are two areas that must be filled in, Accrual Profile and Full-Time Equivalency.

![Employee Roster](image)

**Accrual Profile** – Select the appropriate profile from the drop down menu, select new start date and end date. (If Accrual Profile already exists, you will need to change the end date before entering a new profile.)

**Full-Time Equivalency** – Should correspond to the employee’s current total distribution percentage. Kronos will use this percentage with the chosen accrual profile to calculate the accruals to be granted. Adjustments for employees less than 100% will happen around the 1st of the month.

**Cascade Profile** – Not currently in use.

*Additional information on Accrual grants:* Kronos cannot prorate grants for employees hired part-way through the month. Therefore, grants are delayed for newly hired employees. Manual updating of the initial partial month’s accrual balance is required of Payroll Managers (see appendices for Accrual Updating instructions).
5. **User Information** – determines the computer logon information and should be automatically filled in from the daily upload. All UCSB employees will use their UCSBnetID user name and password to access Kronos.

* **User Name**: should be their UCSBnetID.

**Logon Profile**: should be set to Default.

**Authentication Type**: should be set to LDAP.

**Account locked**: if employee has exceeded the number of allowed logon attempts, the system will lock the account. You will need to unlock the account, by removing the check mark that will appear in the **Account Locked** box. (Please see below.)

**User Account Status** – should not need to be changed, unless an employee was incorrectly terminated at some point and needs reactivation of their User Account.

Occasionally the daily upload is unable to identify students who swipe in and out at a time clock. Their badge number will need to be updated in this situation. See **Timekeeper** under **Job Assignment** for additional details.

If an employee enters an incorrect user name and password three times, their account will be locked out:

The **User Information** screen will also show.

To unlock the account, uncheck the box next to **Account locked** and click **Save**.
6. **Contacts** – with the exception of the email address, the fields on this screen are optional.

Departments may choose to enter phone numbers, both primary (i.e. home or cell phone) and alternate (i.e. emergency contact) for quick look-up using built-in genies.

An email address should be entered for **ALL** active employees, since it is used for important system-generated notifications.
7. **Additional Information** – supplemental information configured for reporting purposes.

![Employee Roster Screenshot](image)

**Title Code** – imported from PPS.

**Appointment Type** – imported from PPS.

**Include OT Supplemental Pay** – enter a “Y” if the employee has opted to have overtime paid on the supplemental pay cycle (the 19th of the month). Otherwise it should be left blank.

**ERIT Percentage** – if the employee is participating in ERIT, enter the percentage of time they are on Regular pay status. Otherwise it should be left blank.

**Background Check Clearance Date** – enter date notified by HR that employee has cleared background check.

**Primary Work Location** – if needed, enter building location for departments with multiple locations.

**Furlough-Temp. Layoff Tier** – not currently in use.

**KnowledgePass Learning Path** – not currently in use.

**Restricted User box** – not currently in use.
Job Assignment Tab

1. Job Assignment Summary – read-only summary of information from Job Assignment Tab.

![Job Assignment Summary Image]

2. Primary Account – Displays the Primary Labor Account based on predetermined logic (see page 114 for details).

![Primary Account Image]

Primary Account work box
- Most of the primary account is imported from PPS initially, but the Access Control number must be set by the Timekeeper, using the Timekeeping Manager Assignment Application (details starting on page 109).
- Access Control numbers and Special Function codes are created by the Kronos System Administrators; contact the Kronos team with any related questions.
- To make changes to the primary labor account history (to correct errors), place your cursor in the second box under *Primary Labor Account*, click the down arrow and choose Search…. The Select Primary Labor Account window will open. Select the radio button of each labor level, scroll through the corresponding list and double click to select a new entry for it.

There are Seven Labor Levels:

- **Account** – 6-digit assigned department/unit payroll account.
- **Fund** – 5-digit assigned fund.
- **Project Code** – department defined code; optional.
- **Cost Center** – department defined code; optional.
- **Access Control** – Kronos defined manager codes; will help determine which manager(s) can see the employee’s record.
- **Special Function** – 4-digit department defined codes for tracking purposes; optional.
- **DistNum** – 2-digit distribution number; corresponds to active PPS distribution.

- Click OK once labor levels have been selected.
- Choose an **Effective Date** for the account by placing your cursor in the second box under *Effective Date*, click the down arrow and choose the correct date from the pop-up calendar. The date can also be typed in the box.

**NOTE:** Pay special attention to the effective date – Kronos sets it to the day it updates from PPS, but that is not necessarily the accurate date. Make sure the effective date matches the change to the primary account – distribution changes, manager changes, etc. Effective dates can be changed retroactively (up to the last Sign-off date).

Some employees have more than one labor account to which their hours need to be charged. Kronos uses logic to define which labor account becomes the primary labor account. Any hours to be paid on a non-primary labor account will have to be transferred in the timecard (explained in the Editing Timecard section) or through the employee’s schedule, or automatically through Kronos-created auto-transfer rules, based on the appointment type of the related employee. For more on this, please refer to "Sharing Employees" on page 82 of this manual.

**Reports To** – Select Search…., type in the manager’s last name followed by an asterisk, click Search, select the appropriate manager and click OK. If the manager does not show in the list it is because he/she has not been assigned a Workforce Manager license.

**Percentage Allocation Rule**: See handout in appendices for additional details; these are "rules" which automatically allocate timecard hours to selected labor accounts based on “trigger” situations on the timecard.
3. **Timekeeper** – Screen used to assign pay rule, device group, and identifying badge number information.

Worker Type – The drop-down list identifies the type of worker (Career, Contract, Limited, etc).

**Standard Hours** – Not currently in use.

**Pay rule** – Determines how employee time entries are calculated. *Be very careful to make the correct selection as this determines how the employee’s hours, including overtime, are calculated.*

For example: **CX CAREER BANK RESTRICTED 30** where:

- **CX** = The Union (99, CX, IX, SX, RX, TX, etc.).
- **CAREER** = Type of employee (Career, Student, Limited, etc.).
- **BANK** = How the employee has elected to receive overtime (bank = comp time and pay = paid overtime).
- **RESTRICTED** = Restricted employees have restricted punch times based on schedules while open employees can punch at any time.
- **30** = The designated automatic lunch period deducted after an employee works more than 6 hours (30, 45, 60, 90 or blank for no automatic lunch deduction).

If you are unclear as to which pay rule is correct or if you need a pay rule that doesn’t exist, please contact your Kronos Payroll Manager. *Choosing the correct pay rule is imperative.*
Wage Profile – Not currently in use.

Device Group – Determines which time clocks an employee can use to clock in and out. This option must be set for any employee who utilizes a time clock.

Currency – Not currently in use.

Base wage work box - The employee’s hourly wage without any premium values (overtime, shift differential, and so on). This information comes from PPS for student and limited employees only. Use of this field is optional, as it is purely informational.

Badge Number work box –

<table>
<thead>
<tr>
<th>Badge Number</th>
<th>Start Date</th>
<th>Start Time</th>
<th>End Date</th>
<th>End Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>3110934</td>
<td>3/02/2008</td>
<td>11:14AM</td>
<td>1/26/2010</td>
<td>4:59PM</td>
</tr>
<tr>
<td>70663064</td>
<td>1/26/2010</td>
<td>4:59PM</td>
<td>2/26/2010</td>
<td>4:02PM</td>
</tr>
<tr>
<td>95893</td>
<td>8/26/2010</td>
<td>4:02PM</td>
<td>Forever</td>
<td></td>
</tr>
</tbody>
</table>

Badge Number – Must be filled in to allow the employee to use a time clock.

- **Students** – PERM number functions as the badge number.
- **Limited and Career** – Last 7 digits of Employee ID number functions as the badge number.

Start Date – The system will automatically enter the current date when a badge number is entered.

Start Time – The system will automatically enter the current time when a badge number is entered.

End Date – System derived when a new badge is entered. Employees can only have one active badge number at a time.

End Time – System derived.
4. **Access Profiles** – Determines the components that an employee can access and the types of functions they can perform within the system.

**Function Access Profile** – Select the correct UCSB profile from the drop down menu. The most commonly used profiles are:

1. **UCSB Employee-leave entry** – Any employee who only enters leave time (exception pay).
2. **UCSB Employee-leave entry + hrs worked** – Any employee who enters leave time and hours worked on their timecard (nonexempt employees).
3. **UCSB Employee-punch in and out + no leave entry** – Any employee who does not enter leave time and only clocks in and out at a time clock.
4. **UCSB Manager** – Any manager, independent of how they record their time.
5. **UCSB Manager – view and approve** – Any manager who is only supposed to view and approve their reporting employees’ timecards (without making any edits).
6. **UCSB Manager – who is exempt** – Any manager who is an exempt employee (does not need or want to see/use the Hours Worked pay code).
7. **UCSB Timekeeper** – contact Timekeeping Support ([ets-timekeeping@ucsb.edu](mailto:ets-timekeeping@ucsb.edu)) to setup.
8. **UCSB Payroll Manager** - contact Timekeeping Support ([ets-timekeeping@ucsb.edu](mailto:ets-timekeeping@ucsb.edu)) to setup.

**Display Profile** – Select the correct profile from the drop-down menu. The most commonly used are:

1. **UCSB Employee** – for non-managers.
2. **UCSB Manager** – for most managers.
3. **UCSB Timekeeper and Payroll Manager** – for Timekeepers and Payroll Managers.

**Locale Policy** - Currently not in use.

**Notification Profile** – Automatically defaults to “E-mail and Navigator” – determines how/which notification emails are sent to the employee.

**Delegate Profile** – (Only available on employees with a Manager license) – currently not in use.

**Generic Data Access Profile** work box – (only available on employees with a Manager license) – to be assigned to Managers, Timekeepers and Payroll Managers only.
5. **Manager Role – General** (only available on employees with a Manager license) – determines the access the employee has AS A MANAGER.

**Employee Group** – Determines the group of employees to which the manager has access; these groups are created by the System Administrators.

**Can See Transferred Employees** – Should be checked so the manager can see any employee transferred to their account.

**Labor Level Transfer Set** – Determines the labor account levels the manager can use for transfers.
- Managers – Should be left as Empty Profile (unless otherwise specified by Kronos Team to accommodate specific departmental needs).
- Timekeepers and Payroll Managers – Should be set to All Labor Accounts.

**Approval Set** – Should be left as Empty Profile.

**Pay Codes "Edit" Profile** – Determines the pay codes to which the manager has access when editing another employee’s timecard.
- Managers – Should be set to Manager.
- Timekeepers and Payroll Managers – Should be set to Timekeeper.

**Pay Codes "View" Profile** – determines the pay codes to which the manager has access when running reports. Should be set to All Pay Codes for both Managers and Timekeepers.

**Work Rule Profile** – Determines the work rules the manager can use for transfers.
- Managers – Should be left as Empty Profile.
- Timekeepers and Payroll Managers – Should be set to All Labor Accounts

**Reports Profile** – Determines the reports the manager has access to run in the Reports area. Should be set to Manager for both Managers and Timekeepers.

**Can Approve Overtime Request** – Should be checked if the manager is allowed to approve overtime.

**Currency Display Preference** – Currently not in use.
6. **Employee Role** – Determines the access the employee has as an Employee on their own timecard.

![Image of Employee Roster](image)

**Labor Level Transfer Set** – Determines the labor account levels the employee can use to transfer their own time; this field is auto-populated by the Kronos application and should not be edited.

**Time Entry Method** – Determines the access the employee has to their timecard.

- **Hourly View** – Allows the employee to view their electronic timecard.
- **Project View** – Currently not in use.
- **Time Stamp** – Currently not in use.
- **Time Stamp & Hourly View** – Adds the option for the employee to clock in and out using the timestamp feature and allows the employee to view their electronic timecard; should be used for Student and Limited employees, in addition to other appropriate employee types.

**Pay Codes "Edit" Profile** – Determines the pay codes to which the employee has access in their own timecard. Choose the correct Employee profile. **All Pay Codes, Manager, and Timekeeper** should never be used in the Employee Role.

**Work Rule Profile** – Determines the work rules the employee can use for transfers in their own timecard; should be set to **Empty Profile**.
Access Control Numbers & Employee Groups: Creation, Use, Re-Use, and Removal Instructions

**Access Control Number (ACN):** Number associated with a managerial position; used to control who can view and approve an employee’s timecard in Kronos. To fully understand ACNs, it is necessary to understand the process of their creation, use, re-use and removal from Kronos.

**ACN Creation**

ACNs are centrally created and modified exclusively by the Kronos System Administrators (KSAs). An ACN is created for every Kronos manager and is associated with the working title of the managerial position, rather than the name of the current employee with that working title. The naming convention used to create ACNs is as follows: DEPT00000; that is, the four letter department identifier (such as ENGR for the Engineering Department) followed by 5 numbers which map out the managerial role’s ability to see the reporting employees’ timecards in reference to the department’s reporting structure. Each of the 5 number positions represents 1 “tier”/level of management/peer managers group within a department; thus, the highest/most expansive view of a department’s employees would be indicated by DEPT10000, while each subordinate tier (e.g., DEPT11000, DEPT11100, DEPT11110, and DEPT 11111) reflects both a reporting relationship as well as reduced/limited ability to see of employee timecards within the reporting line (see chart below). Upon creation of an ACN, the Kronos System Administrators will notify affected departments that the ACN is ready for use.

Visibility of reporting employees’ timecards flows down the reporting lines (not horizontally or vertically).

```
Director
Access Control: DEPT10000

Manager 1
Access Control: DEPT11000

Sub-Manager 1:
Access Control: DEPT11100

Non-Manager:
No ACN

Manager 2
Access Control: DEPT12000

Non-Manager:
No ACN

Non-Manager:
No ACN
```
ACN Use

ACNs are used in Kronos to identify every employee by the manager to whom they primarily report. This is accomplished by ensuring the ACN of each employee’s manager is input into the primary labor account of each employee via the Timekeeping Manager Assignment application (see page 109 of this manual). You can see below that the employee reports to ACN ENGR10000 (the director of the Engineering department).

Once an employee has an ACN in their primary labor account, Kronos is able to grant visibility of that employee to the appropriate manager(s); this process of granting visibility based on ACNs is dependent on one additional feature created exclusively by the KSAs: Employee Groups (see pages 80-81 for additional details).

ACN Re-Use

Because ACNs are created based on working titles of positions, rather than employee names, they are highly reusable, even when managers are replaced by a new person.

ACN Removal

The only time when ACNs may not be re-used is in the case of a department reorganizing their reporting structure in a way that eliminates the need for an ACN (in this case, the KSAs would delete/inactivate the outdated ACN and thus eliminate reusability of that ACN).
**Employee Group (EG):** Determines the group of employees to which a manager has access in Kronos. To fully understand EGs, it is necessary to understand the process of their creation, use, re-use and removal from Kronos.

**EG Creation**

EGs are centrally created and modified exclusively by the Kronos System Administrators (KSAs). An EG is created for every Kronos manager’s position, based on their reporting structure and timecard visibility needs within their department(s). Each EG contains a list of primary labor account components that are visible to the manager who is setup with the EG (for example, EG DEPT Manager 1 has visibility over all employees whose primary labor account includes one of the listed department accounts, one of the listed ACNs, and any other value for the fund, project code, cost center, special function and distribution number fields, as the asterisk indicates).

The naming convention used to create EGs is as follows: DEPT Working Title. The DEPT portion is a four letter department identifier (such as ENGR for the Engineering Department), while the Working Title is specific to the managerial position. The expanded chart below shows some sample EGs (represented by screenshots to left and right of the chart) in relation to their associated managerial positions. Upon creation of an EG, the Kronos System Administrators will notify affected departments that the EG is ready for use.
Section IV – Timekeepers: Access Control Numbers & Employee Groups

EG Use

EGs are used in Kronos to identify visibility privileges for each managerial position within each department. This is accomplished by ensuring the EG of each manager is input into the Manager Role – General section of the manager’s People Record in Kronos (for example, see EG “ENGR Machinist” in screenshot below). You can see that this manager’s EG gives visibility over any employees whose primary labor account contains one of the listed accounts, one of the listed ACNs, and any other value for the remaining fields, represented by the asterisk.

EG Re-Use

EGs may be reused or concurrently used by as many managers as need the related visibility privileges. Typically, two of the rare situations where concurrent use of the same EG is needed occur with Co-Directors of a department, or a Department Director and their department’s Payroll Manager/Timekeeper. It is important to remember that EGs are simply a tool for granting visibility rights and they only work correctly when all of the manager’s reporting employees are configured with the manager’s related ACN in their primary labor account or labor level transfer set (which is what the Timekeeping Manager Assignment (TMA) application creates, see page 109 for details).

EG Removal

To remove an EG from a manager, access their People Record > Manager Role – General section. Click their current EG > Select Empty Profile (or their new EG, if changing roles), then click Save. This will cancel the manager’s visibility over any related employee’s timecards. Setting the EG to Empty Profile is recommended best practice anytime a manager terminates/separates from their current department/staff position.
Sharing Employees

Kronos provides many tools and automated functionality for streamlining the process of handling shared employees. A summary of these tools and functionality is as follows:

- Queries to search and find any shared employee regardless of having any transferred hours on the timecard.
- Automated creation (by the Kronos application) of rules to transfer hours worked by fixed appointment employees who work in multiple departments.
- Automated creation (by the Kronos application) of labor level transfer sets for shared variable appointment employees, to allow precise, point-of-service clock-in/transfer ability of hours between multiple departments and multiple positions.
- Automatic importing of default, logical values for most People Record (Kronos Profile) fields at the point of hire or re-hire.

Some necessary considerations for successful sharing of employees using Kronos:

1. When hiring an employee who already works for another department, contact the Timekeeper of that department. The two of you will need to answer (with assistance from the Managers):
   a. Do any of the jobs require a set schedule?
      - If yes, then ensure that both departments are utilizing schedules to avoid punch errors for clock/timestamp employees.
   b. When is the preferred time to Sign Off the timecard in each pay period?
      - One time must be selected, as only one of the Payroll Managers will be able to Sign Off on the timecard in each pay period.
   c. How does the employee enter their time?
      - The answer to c will determine the device group to which the employee should be assigned and/or their access to the system for entering time. If they work in multiple time clock zones they will need to have their device group set to UCSB All Clock. Otherwise, leave it set to the appropriate area. If the employee uses timestamp to record their time, make sure the Function Access Profile is set to the correct "UCSB..." Function Access Profile and Time Entry Method is set to Time Stamp & Hourly View. If clocks/timestamping is/are not used, then Hourly View is sufficient for Time Entry Method.
   d. What are the pay rule needs?
      - The answer to d will determine the pay rule to which the employee should be assigned. Employees can only be assigned to one pay rule, so certain pay rule requirements may outweigh others. Examples include: an employee who works in both restricted and open areas; an employee with an automatic lunch deduction versus punch lunch; an employee with a different work week. Timekeepers and Managers from both departments should work together to determine the pay rule. If shifts need to be calculated differently from the Pay Rule, a Work Rule transfer can be done through the timecard or schedule.

2. Once the employee’s People Record is set, both Timekeepers and Managers will need to continuously check the timecard for correct assignment of hours to proper accounts. Tips for distinguishing hours include:
   - Compare worked hours against the schedule and/or known shifts.
   - Check timecard audit trail for clock-in location (under User and Data Source).
   - Verify the hours with the employee’s manager in both areas.

3. At the end of each pay cycle, review all hours to ensure they are set to the correct account.

4. After the upload, review the payroll report to make sure hours were charged correctly.
Section IV – Timekeepers: Rehiring Employees (with previous Kronos records)

Rehiring Employees (with previous Kronos records)

After the employee has been rehired in PPS, do the following in the employee’s People Record.

1. Reassign licenses (if not done automatically by Kronos).
   a. To find the employee, use the Terminated Employees HyperFind Query in one of the widgets.
   b. Select the employee’s name and click on the People Editor link.
   c. Go to Licenses on the Person tab.
   d. Check the boxes next to Workforce Timekeeper and Workforce Employee.

2. Verify that the new Active date is correct. If it is not:
   a. Go to the Employment Status work box under General Information of the Person tab in the People Editor.
   b. In the Employment Status box, verify Active status as of the correct Effective Date.
   c. Click Save on the menu bar to save your changes.

3. Make sure the Primary Labor Account information was imported correctly from PPS and that the Effective Date matches the distribution Begin Date.

4. Update the Worker Type, Pay Rule and Effective Date, Device Group and Badge Number on the Timekeeper screen.

5. Make sure the employee’s access and time entry method are still correct under Access Profiles and Employee Role.

6. Review the employee’s accrual totals on the timecard. Based on personnel policy, the employee may be entitled to some or all of the previous sick balance. Usually all vacation and compensatory time should have been paid out so the balance should be zero. If either the vacation or compensatory time balance is greater than zero, please contact your Kronos Payroll Manager.
Separating and/or Terminating Employees

The procedure for terminating an employee varies based on the type of employee and the timing of the termination.

*NOTE: Make sure the employee does not work in any other UCSB Departments before proceeding with the separation/termination process.

If the employee works in another department, do not separate in PPS (only end your appointment and distribution) and do not terminate in Kronos.

If the employee is only in your department, please adhere to the following procedures.

**Exception Paid Employees**

1. Separate the employee in PPS.
2. Verify and note the employee’s accrual balances as of the last day of employment.
3. (If Manager) Edit Employee Group to be Empty Profile and Click Save.
4. Prepare a 72-hour check request, process through Accounting and follow procedures to ensure employee is not overpaid.
5. Remove all of the employee’s licenses from Kronos after they receive their final check.

**Positive Paid Employees**

If it is before payroll upload:

1. Separate the employee in PPS.
2. (If Manager) Edit Employee Group to be Empty Profile.
3. Do not Sign Off on the Timecard (employee and manager approvals are needed, but not Sign-Off).
4. Prepare a 72-hour check request form for all unpaid hours and process through Accounting.
5. Verify the employee does not show up on the next Kronos payroll report. If they do, you will need to RX the hours to ensure the employee is not paid twice.
6. Remove all of the employee’s licenses from Kronos after they receive their final check.

If it is after payroll upload but before checks have been cut:

1. Separate the employee in PPS.
2. (If Manager) Edit Employee Group to be Empty Profile.
3. Prepare a 72-hour check request for all hours since the last pay check (including those uploaded from Kronos for the next paycheck) and process through Accounting.
4. Do an RX transaction for the hours uploaded from Kronos for the next paycheck to make sure the employee is not double-paid for this time.
5. Remove all of the employee’s licenses from Kronos after they receive their final check.

If it is after checks have been cut but before payday:

1. Separate the employee in PPS.
2. (If Manager) Edit Employee Group to be Empty Profile.
3. Prepare a 72-hour check request from for all hours on the current pay cycle, process through Accounting and follow procedures to ensure employee is paid properly.
4. Remove all of the employee’s licenses from Kronos after they receive their final check.
Editing Timecards

The manager is responsible for most edits to employee timecards. However, there are a few situations where the Timekeeper is responsible for changes.

Entering Leave

It is the Timekeeper’s responsibility to enter Leave No Salary, FMLA, Worker’s Compensation and Extended Leave pay codes. Managers do not have access to these pay codes. Please work closely with Human Resources or Academic Personnel to ensure accuracy.

Transferring Hours and/or Work Rules

If an employee works in more than one position (including multiple jobs within one department, multiple departments or varying pay rules) hours will need to be transferred to the non-primary account or rule. Hours can be transferred in one of two ways (if not already automatically transferred by the Kronos application):

1. After the shift has been worked the hours can be transferred in the body of the timecard.
   a. Click on the transfer box between the In punch and the Out punch.
   b. Select Search from the drop down menu. This will give you a box in which you will need to select each labor account and/or work rule for the transfer.
   c. Click OK to return to the timecard.
   d. Click Save on the timecard to finalize your changes.

OR

2. Set up the hours to be transferred in the schedule through the Add Shift feature in either the Schedule or Pattern Editors.
Pay Period Close Duties

At the end of each pay cycle it is the Timekeeper’s responsibility to check for:

- Missed punches
- Unapproved Time
- Timecard Approvals – both employee and manager
- Full working hours for career employees*

Managers should be notified by the timekeepers of any discrepancies so they can reconcile them.

* Reconciliation of total hours includes making sure all LNS, FMLA, Worker’s Comp, etc. has been entered. It also includes reducing Holiday hours when applicable.

Approving Timecards

_Timekeepers should only approve the timecards of employees they directly supervise._ Timekeepers must enforce Manager approval of timecards by working with them to plan ahead and ensure the appropriate delegation of authority is in place. Separation of duties must be maintained.

Please see the Manager section for additional information on approval of timecards.

Timecard Sign Off

Once the timecard is ready for payroll, including approvals by both the employee and manager(s), it is the Payroll Manager’s responsibility to Sign Off for payroll upload.

From either the Pay Period Close or Approvals Summary widgets, the Payroll Manager must:

1. Select employees to be Signed Off.
2. Go to Approvals and choose Sign Off.

Accruals and Leave Reporting

It is imperative to meet campus Leave Reporting deadlines and ensure accuracy of leave balances in both PPS and Kronos. If balances are off in the Kronos system, please contact your Kronos Payroll Manager.

- Once timecards have been reviewed and approved, the hours of vacation, sick, compensatory time taken, and compensatory time earned will be uploaded from Kronos to PPS (for exceptions to this rule, see attached appendix regarding What Data Flows from Kronos to PPS).

- Adjustments for LNS, etc., will be done once timecards have been reviewed and approved.

- Balance Exception reports will be prepared showing balances that do not match between Kronos and PPS. Timekeepers should determine which is correct and update PPS or have the Kronos Payroll Manager update Kronos.

The **Accrual Balances** widget provides a quick summary of accrual information.

*NOTE: When viewing a Specific Date in the widgets or on the timecard, the balance shown will include any hours taken that day. To figure out the starting balances, simply add the hours taken to the total shown.*
Paying By Agreement (BYA) Employees

Employees with a BYA Flat Monthly Rate pay rule will not be included in the payroll upload and must be paid manually in PPS.

Review of Kronos Payroll Report

Once Sign-off of employees has occurred and the hours uploaded to Campus Payroll, reports will be distributed showing the hours uploaded for each department. The Timekeeper should:

- Compare the report, line by line, against the Previous Pay Period and/or timecards in Kronos for each employee.

- If hours show in Kronos but are not on the report:
  - Determine why by comparing account information against PPS and correct, as needed, in Kronos for the future.
  - Manually pay any hours missing from the report in PPS through IDTC or an LX transaction.
  - Print a copy of the manual PPS payment for file.
  - Contact your Kronos Payroll Manager if assistance is needed.

- Verify terminated employees have not been included; follow procedures as detailed under Separating and/or Terminating Employees (manual page 84).

- Save report for reconciling the Payroll Ledger as per department policy.
Section IV – Timekeepers: Pay Period Close Duties
SECTION V

Appendices
Guide to Handling Payroll With Missing Staff Members

Scenario 1:

Employee forgot to approve their Kronos timecard in time for their Manager to approve it for the most recent pay period.

Kronos Team Recommendation:
1. (Manager) Review the hours on the employee’s timecard.
   a. Correct any errors and input Comments with any edits that are made.
2. Approve the timecard without the employee’s approval (because obtaining employee approval is no longer an option).
3. Print a copy of the timecard, have the employee sign it when they return to work, and file the signed copy of the timecard in the employee’s personnel file.
4. If applicable, disciplinary action may be required to ensure employee approves their timecard in future pay periods according to department procedures.

Scenario 2:

Manager is unexpectedly unavailable to approve their direct reports’ timecards.

Kronos Team Recommendation:
1. (Payroll Manager) Review and Sign Off the worked hours on the timecard.
2. Print the timecard.
3. Ensure that both the employee and the manager sign and approve the printed timecard.
   a. If any discrepancies arise in the time reporting, confirm the correct hour quantities to be paid and act accordingly.
4. File the signed copy of the timecard in the employee’s personnel file.

Scenario 3:

Payroll Manager is unavailable to perform Sign Off for their department.

Kronos Team Recommendation:
1. Back-up Payroll Manager for the department performs Sign Off.
2. If no back-up Payroll Manager exists, prepare a screenshot list of employees who should be signed off and send this to ets-timekeeping@ucsb.edu for assistance in Sign-Off on behalf of the department.
Important Deadlines for Departmental Timecard Procedures

**BW Employees**

<table>
<thead>
<tr>
<th>Deadline Chart for BW Kronos Timecards</th>
<th>Following End of Each Pay Period</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Monday, end of day</td>
</tr>
<tr>
<td>Employee Approval</td>
<td>X</td>
</tr>
<tr>
<td>Manager Approval</td>
<td></td>
</tr>
<tr>
<td>Payroll Manager Sign-Off</td>
<td></td>
</tr>
</tbody>
</table>

*Explanation*

Monday, end of day: Employee must approve their timecard.

Tuesday, morning: Manager must approve their direct reports’ timecards.

Wednesday, after pay period end at 10:00 am: Payroll Manager must sign off their departmental timecards. Timecards not signed off by the deadline will require manual entry into PPS.

**MO Employees**

<table>
<thead>
<tr>
<th>Deadline Chart for MO Kronos Timecards</th>
<th>Following End of Each Pay Period</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>3 days</td>
</tr>
<tr>
<td>Employee Approval</td>
<td>X</td>
</tr>
<tr>
<td>Manager Approval</td>
<td></td>
</tr>
<tr>
<td>Payroll Manager Sign-Off</td>
<td></td>
</tr>
</tbody>
</table>

*Explanation*

3 days after pay period end: Employee must approve their timecard.

5 days after pay period end: Manager must approve their direct reports’ timecards.

10:00 am on the morning of the MO upload published on the Kronos Payroll Deadlines calendar: Payroll Manager must sign off their departmental timecards.
How to Handle Payroll Close – Biweekly

Listed below are items that are bolded in the text. These indicate screens, tabs and fields to identify in Kronos.

PAY PERIODS

Biweekly Pay Period Employees
Currently, the biweekly payroll upload includes all nonexempt career and student/limited (non-MO) employees. Of the hours reported on their timecards, the following data uploads automatically:

<table>
<thead>
<tr>
<th>Which Pay Codes Upload Automatically from Kronos to PPS?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Uploads Automatically</strong></td>
</tr>
<tr>
<td>• All Comp Time Hours Accrued</td>
</tr>
<tr>
<td>• All Comp Time Hours Taken</td>
</tr>
<tr>
<td>• All Sick Hours Taken</td>
</tr>
<tr>
<td>• All Vacation Hours Taken</td>
</tr>
<tr>
<td>• For Variable Appointments Only:</td>
</tr>
<tr>
<td>o All Hours Worked</td>
</tr>
<tr>
<td>o All Paid Comp Time Hours</td>
</tr>
<tr>
<td>o All Paid Holiday Hours</td>
</tr>
<tr>
<td>o All Paid Overtime Hours</td>
</tr>
</tbody>
</table>

If any of these data items do not get uploaded (due to missing sign-off or any other reason), they must be manually entered via a PPS transaction in the soonest appropriate payroll window. **Catastrophic Leave** is an exception to this rule, because it is the responsibility of Human Resources to enter the PPS transaction(s) for Catastrophic Leave activity.

Pay Period End (PPE)
The biweekly pay periods are scheduled every two weeks starting on Sunday and ending the following Saturday at midnight. There are two biweekly pay periods which make up a quadraweekly cycle, these are labeled B1 and B2. Employees are granted their accruals on the calendar day after the close of the B2 cycle (Sunday).

MANAGER RESPONSIBILITIES
Timekeeping Tab: Select the Approve Timecards/Pay Period Close widget.

STUDENT AND LIMITED EMPLOYEES: In the Show field, select All Emps-All Stu/Lim >0 to reconcile payroll.

1. Reconcile missed punches – verify why missed
   a. If the employee swiped in or out twice, add comment and then delete erroneous punch.
   b. If the employee did not punch in or out, input time and comment as to why.

2. Verify transferred hours
   a. Verify that the hours transferred match the hours you expect.
   b. If not, contact your timekeeper.

3. Unapproved time
   a. Find the day on which the time occurred. Under the Totals and Schedule tab, in the lower left drop down menu, you can select the Daily option.
   b. Then, in the timecard, click each day until you find the unapproved time and select Approvals > Approve Overtime.

4. Approve timecard
   a. Verify that the employee has approved his/her timecard. Look in the Timecard > Sign-off, Requests and Approvals tab for the pay period in question
   b. The manager approves by going to Timecard > Approvals and selecting approve.
5. Meeting Payroll Deadline
   a. Steps 1-4 need to be completed prior to the Payroll upload. Schedule your work load accordingly. Note: Timekeepers need time to review, so the manager should schedule these tasks in their calendars prior to monthly payroll deadlines.

NON EXEMPT CAREER EMPLOYEES: In the Show field, select **All Emps-All NonEx Car**

1. Reconcile missed punches – verify why missed
   a. If the employee swiped in or out twice, add comment and then delete erroneous punch.
   b. If the employee did not punch in or out, input time and comment as to why.

2. Unapproved time
   a. Find the day on which the time occurred. Under the Totals and Schedule tab, in the lower left drop down menu, you can select the Daily option.
   b. Then, in the timecard, click each day until you find the unapproved time and select **Approvals > Approve Overtime**.

3. Approve timecard
   a. Verify that the employee has approved his/her timecard. Look in the **Timecard > Sign-off, Requests and Approvals** tab for the pay period in question
   b. The manager approves by going to **Timecard > Approvals** and selecting approve.

4. Meeting Payroll Deadline
   a. Steps 1-3 need to be completed prior to the Payroll upload, scheduled for 10:00 AM every Wednesday morning after a B2 pay period end date. Note: Timekeepers need time to review, so the manager should schedule these tasks to be completed no later than the close of their business day on Tuesday following the B2 pay period end date.

TIMEKEEPER RESPONSIBILITIES
Timekeeping Tab: Select the **Pay Period Close** widget.

STUDENT AND LIMITED EMPLOYEES

1. Verify that all employee and manager tasks are completed in Kronos.
2. Verify that you see all of your students. If not, they may:
   a. Not have an active distribution or are separated (check PPS).
   b. Be shared with another department (check PPS).
   c. Not be set up correctly in Kronos (check **People Record**).

3. Verify that you see the expected holiday hours posted.
4. Hours are uploaded at 10:00 AM on Wednesdays following the end of each B2 pay period. If the hours do not make the upload, the timekeeper will need to input a transaction for those hours in PPS.
   a. Verify that the hours on the Payroll Report match the hours in Kronos for the Pay Period Close (the report will be sent to your email Wednesday afternoon)
   b. If hours are missing, you have until Thursday at 5:00pm to do an LX transaction in PPS (keep copy for files)
   c. If the hours miss the upload and PPS deadline, input a transaction in PPS during the next biweekly payroll (make sure the missed hours are paid) Track unpaid hours until completed

NON EXEMPT CAREER EMPLOYEES: In the Show field, select **All Emps-All NonEx Car**.

1. Verify that all employee and manager tasks are completed in Kronos.
2. Make sure that the recorded timecard hours match the employee’s FTE:
   a. 100% employees need to have 80 hours in the biweekly pay period.
   b. If the employee is on Leave No Salary, Worker’s Compensation or FMLA, fill out the employee’s timecard with the appropriate hours of absence (your managers will need to work with you to have the leave properly recorded in PPS).
3. Pay Overtime in PPS.
4. Verify that you see all of your employees.
5. The accrual hours are uploaded at 10:00 AM on Wednesdays following the end of each B2 pay period; If the hours do not make the upload, the timekeeper will need to input a transaction for those hours in PPS.
   a. Verify that the hours on the Payroll Report match the hours in Kronos for the Pay Period Close (the report will be sent to your email Wednesday afternoon)
   b. If hours are missing, you have until Thursday at 5:00pm to do an LX transaction in PPS (keep copy of LX for files)
   c. If the hours miss the upload and PPS deadline, input a transaction in PPS during the next biweekly payroll. Make sure these hours get paid, keep track of all unpaid hours until they are paid.

Once the payroll reports are reconciled for both groups of employees, keep these reports with your monthly reconciliation files.

PAYROLL MANAGER’S RESPONSIBILITIES

Timekeeping Tab: Select the Pay Period Close widget.

STUDENT AND LIMITED EMPLOYEES: In the Show field, select All Emps-All Student/Lim>0.

1. Verify that all employee, manager and timekeeper tasks are completed in Kronos.
2. Verify that you see all of your students, and that they are approved by employee and manager.
3. If applicable, assign holiday to eligible employees (see Holiday Instructions for Payroll Managers).
4. Sign off on those employees except when:
   a. Requested to be withheld from upload via email (keep copy of email with upload report).
   b. Employees are missing manager approval or both manager and employee approvals.
   c. Employees have unapproved time or missing punches.
5. Once the payroll reports are ready, keep copies of these reports for future reference.
   a. Select the Approve Timecards/Pay Period Close widget > All Emps-All Student/Lim>0.
   b. Sort employees that are not signed off to the top.
   c. Make report copy for reconciliation records.

NON EXEMPT CAREER EMPLOYEES: In the Show field, select All Emps-All NonEx Car.

1. Verify that all employee, manager and timekeeper tasks are completed in Kronos.
2. Verify that you see your Non Exempt Career employees and the hours match the employee’s FTE:
   a. 100% employees need to have 80 hours in the biweekly pay period
   b. Follow up with timekeepers prior to upload if tasks of missed punches, unapproved time and missing approvals are not completed.
3. Sign off on those employees except when:
   a. Requested to be withheld from upload via email (keep copy of email with upload report).
   b. Employees are missing manager approval or both manager and employee approvals.
   c. Employees have unapproved time or missing punches.
4. The accrual hours are uploaded at 10:00 AM on Wednesdays following the end of each B2 pay period. If they do not make the upload, the timekeeper will need to input an additional transaction in PPS.
5. Once the payroll reports are ready, keep copies of these reports for future reference.
   a. Select the Approve Timecards/Pay Period Close widget > All Emps-All Non Ex Car.
   b. Sort employees that are not signed off to the top; then sign off on appropriate employees
timecards.
   c. Make report copy for reconciliation records.
How to Handle Payroll Close – Monthly

*Listed below are items that are bolded in the text. These indicate screens, tabs and fields to identify in Kronos.*

**PAY PERIODS**

**Monthly Pay Period Employees**

Currently, the monthly payroll upload includes all exempt, academic career, and student/limited MO employees. Of the hours reported on their timecards, the following data uploads automatically:

<table>
<thead>
<tr>
<th>Which Pay Codes Upload Automatically from Kronos to PPS?</th>
<th>Does Not Upload Automatically</th>
</tr>
</thead>
<tbody>
<tr>
<td>• All Comp Time Hours Accrued</td>
<td>• All Catastrophic Leave donations or receipts</td>
</tr>
<tr>
<td>• All Comp Time Hours Taken</td>
<td>• For Fixed Appointments Only:</td>
</tr>
<tr>
<td>• All Sick Hours Taken</td>
<td>o All Paid Comp Time Hours</td>
</tr>
<tr>
<td>• All Vacation Hours Taken</td>
<td>o All Paid Overtime Hours</td>
</tr>
<tr>
<td>• For Variable Appointments Only:</td>
<td>o All LNS hours</td>
</tr>
<tr>
<td>o All Hours Worked</td>
<td>o All Time Not Worked</td>
</tr>
<tr>
<td>o All Paid Comp Time Hours</td>
<td></td>
</tr>
<tr>
<td>o All Paid Holiday Hours</td>
<td></td>
</tr>
<tr>
<td>o All Paid Overtime Hours</td>
<td></td>
</tr>
</tbody>
</table>

If any of these data items do not get uploaded (due to missing sign-off or any other reason), they must be manually entered via a PPS transaction in the soonest appropriate payroll window. **Catastrophic Leave** is an exception to this rule, because it is the responsibility of Human Resources to enter the PPS transaction(s) for Catastrophic Leave activity.

**Pay Period End (PPE)**

The monthly pay periods are different for the following employee types mentioned below:

- **Student and limited MO employees** – the pay period is from the 16th of the month to the 15th of the following month with the hours paid on the monthly pay day scheduled following the 15th.
- **Exempt and Academic Career employees** – the pay period is from the 1st of the month to the last calendar day of the month and is paid on the first working day of the following month. If the pay day falls on a weekend, the pay day is the previous Friday except for the pay due on the first working day of the new calendar year (for hours on pay status in December).

**MANAGER RESPONSIBILITIES**

**Timekeeping Tab:** When a manager opens Kronos, they should select the **Pay Period Close** widget.

**STUDENT AND LIMITED MO EMPLOYEES:** In the Show field, select **All Emps-MO Positive Pay** to reconcile payroll.

1. Reconcile missed punches – verify why missed
   a. If the employee swiped in or out twice-add comment and then delete erroneous punch.
   b. If the employee did not punch in or out-input time and comment as to why.

2. Verify transferred hours
   a. Verify that the hours transferred match the hours you expect.
   b. If not, contact your timekeeper.

3. Unapproved time
   a. Find the day on which the time occurred. Under the Totals and Schedule tab, in the lower left drop down menu, you can select the Daily option.
   b. Then, in the timecard, click each day until you find the unapproved time and select **Approvals > Approve Overtime**.

4. Approve timecard
   a. Verify that the employee has approved his/her timecard. Look in the **Timecard > Sign-off, Requests and Approvals** tab for the pay period in question.
   b. The manager approves by going to **Timecard > Approvals** and selecting approve.
5. Meeting Payroll Deadline –
   a. Steps a.-d. need to be completed prior to the Payroll upload. Schedule your work load accordingly.  
   b. Note: Timekeepers need time to review, so the manager should schedule these tasks in their calendars prior to monthly payroll deadlines.

EXEMPLARY AND ACADEMIC CAREER EMPLOYEES – In the Show field, select All Emps-All Exempt
1. Verify vacation and sick time taken
   a. Exempt employees can only take time in full day increments (e.g. 8, 10, 12 hours, etc).
   b. Exempt employees do not record hours worked.
2. Approve timecard
   a. Verify that the employee has approved his/her timecard. Look in the **Timecard > Sign-off, Requests and Approvals** tab for the pay period in question.
   b. The manager approves by going to **Timecard > Approvals** and selecting Approve.
3. Meeting Payroll Deadline
   a. Steps a.-b. need to be done prior to the Payroll upload. See scheduled payroll deadlines.  
   b. Note: Timekeepers need time to review their department managers’ work, so the manager should schedule these tasks to be completed prior to payroll deadline.

TIMEKEEPER RESPONSIBILITIES

**Timekeeping Tab**
Select the **Timekeeping tab > Approve Timecards/Pay Period Close** widget

STUDENT AND LIMITED MO EMPLOYEES

1. Verify that all employee and manager tasks are completed in Kronos.
2. Verify that you see all of your students, if not they may:
   a. Not have an active distribution or are separated (check PPS)
   b. May be shared with another department (check PPS)
   c. Not set up correctly in Kronos (check **People Record**)
3. That you see the expected holiday hours posted
4. Once the hours have been uploaded
   a. Verify that the hours on the Payroll Report match the hours in Kronos for the Pay Period Close (the report will be sent to your email the afternoon of the upload)
   b. If hours are missing, you have until MO Pay Period Close at 5:00pm to do a transaction in PPS (keep copy for your files)
   c. If the hours miss the upload, input a transaction in PPS in the next monthly payroll. Make sure these hours get paid, keep track of all unpaid hours until they are paid.

EXEMPLARY AND ACADEMIC CAREER EMPLOYEES-In the Show field, select All Emps-All Exempt

1. Verify that all employee and manager tasks are completed in Kronos.
2. Verify that you see all of your employees.
3. Once the accrual hours have been uploaded:
   a. Verify that the hours on the Payroll Report match the hours in Kronos for the Pay Period Close
   b. If hours are missing, you have until the MO Pay Close at 5:00pm to input a transaction in PPS.
   c. If the accrual hours miss the upload, do a transaction in PPS in the next monthly payroll.

Once hours are verified and the payroll report is reconciled, keep it filed with your monthly reports for payroll.

**PAYROLL MANAGER RESPONSIBILITIES**

Review all MO timecards and sign off, where appropriate, by 10:00AM on the MO upload day.
How to Setup a Non-Manager Employee

Listed below are the required People Record fields for setting up a non-manager employee. All other fields not mentioned below will either update automatically or are not in use at this time.

PERSON TAB

Accruals & Leave
  Accrual Profile – Select appropriate accrual profile (based on employee unit code and accrual codes), start date should be set to hire date and end date should be set to Forever.
  Percentage – If employee is less than 100% enter their % according to their job description (e.g. 50%).

Contacts
  E-mail – Enter employee’s email address.

JOB ASSIGNMENT TAB

Primary Account
  Update access control number to reflect the employee’s assigned manager via the Timekeeping Manager Assignment (TMA) application at https://ma.timekeeping.ucsb.edu.
  Primary Account (if incorrect, take corrective action in PPS or contact Timekeeping Support).
  Reports To – Select Search…, type in the manager’s last name followed by an asterisk, click Search, select the appropriate manager and click OK. If the manager does not show in the list it is because he/she has not been assigned a Workforce Manager license.

Timekeeper
  Worker Type – Select the appropriate worker type (e.g. Career, Student, Limited, Academic, Contract, etc).
  Pay Rule – select the correct pay rule for the employee and set the Effective Date as their hire date.
  Device Group – Set to where employee will be clocking in and out. If the employee works in more than one department, set to “UCSB All Clocks.” If employee will not clock in anywhere, leave field as is.
  Badge Number – enter last 7 digits of the employee’s UCSB ID (or if student employee, enter their perm number). Hit Enter and the remaining badge information will auto fill.

Access Profile
  Function Access Profile – Select one of the following available options from the dropdown list:
    UCSB Employee-leave entry
    UCSB Employee-leave entry + hrs worked
    UCSB Employee-punch in and out + no leave entry
  Display Profile – Select UCSB Employee.
  Notification Profile – Select Email and Navigator.

Employee Role
  Time Entry Method –
    For Time Clock, Time Duration and Leave Time Employees, select Hourly View.
    For Timestamp Employees, select Time Stamp & Hourly View.
  Pay Codes "Edit" Profile – Select NE Hours Worked Employee or Exempt Employee.
How to Maintain a Non-Manager Employee

Listed below are the required People Record fields for maintaining a non-manager employee. All other fields not mentioned below will either update automatically, or are not in use at this time.

PERSON TAB

Licenses
Workforce Manager – Uncheck this box when a manager moves to a non-managerial position; otherwise, leave as is.

Accruals & Leave
Accrual Profile – Select appropriate accrual profile (based on employee unit code and accrual codes). Start Date should be set to hire date and End Date to Forever. If an employee has reached a years of service milestone, enter an End Date for the current Accrual Profile; add a line and select the new Accrual Profile with the new Start Date and the End Date as Forever.
Percentage – If employee is less than 100% enter their % according to their job description (e.g. 50%).

Contacts
E-mail – Enter employee’s updated email address.

JOB ASSIGNMENT TAB

Primary Account
Update access control number to reflect the employee’s assigned manager via the Timekeeping Manager Assignment (TMA) application at https://ma.timekeeping.ucsb.edu.

Primary Account
Delete or change any unnecessary special function codes in the labor levels. Verify that any other labor levels are correct and have been updated accordingly. Confirm that the effective date matches the effective date of the new appointment.

Reports To – Select Search…, type in the manager’s last name followed by an asterisk, click Search, select the appropriate manager and click OK. If the manager does not show in the list it is because he/she has not been assigned a Workforce Manager license.

Timekeeper
Worker Type – Select the appropriate worker type (e.g. Career, Student, Limited, Academic, Contract, etc).
Pay Rule – Select the correct pay rule for the employee and set the Effective Date as their promotion/new appt start date.
Device Group – Set to where employee will be clocking in and out. If the employee works in more than one department, set to "UCSB All Clocks." If employee will not clock in anywhere, leave field as is.
Badge Number – Enter last 7 digits of the employee’s UCSB ID (or if student employee, enter their perm number). Hit Enter and the remaining badge information will auto fill.

Access Profile
Function Access Profile – Select one of the following available options from the dropdown list to reflect the new job duties:
UCSB Employee-leave entry / UCSB Employee-leave entry + hours worked / UCSB Employee-punch in and out + no leave entry
Display Profile – Select UCSB Employee.
Notification Profile – Select Email and Navigator.

Employee Role
Time Entry Method – For Time Clock, Time Duration and Leave Time Employees, select Hourly View.
For Timestamp Employees, select Time Stamp & Hourly View.
Pay Codes "Edit" Profile – Select NE Hours Worked Employee or Exempt Employee.
How to Setup a Manager Employee

Listed below are the required People Record fields for setting up a manager employee. All other fields not mentioned below will either update automatically, or are not in use at this time.

PERSON TAB

Licenses
  Workforce Manager – Check the box associated with this license.

Accruals & Leave
  Accrual Profile – Select appropriate accrual profile (based on union representation and accrual codes), start date should be set to hire date and end date should be set to Forever.
  Percentage – If employee is less than 100% enter their % according to their job description (e.g. 50%).

Contacts
  E-mail – Enter employee’s email address.

JOB ASSIGNMENT TAB

Primary Account
  Update access control number to reflect the employee’s assigned manager via the Timekeeping Manager Assignment (TMA) application at https://ma.timekeeping.ucsb.edu.
  Primary Account (if incorrect, take corrective action in PPS or contact Timekeeping Support).
  Reports To – Select Search…, type in the manager’s last name followed by an asterisk, click Search, select the appropriate manager and click OK. If the manager does not show in the list it is because he/she has not been assigned a Workforce Manager license.

Timekeeper – review the following for any changes:
  Worker Type – Select the appropriate worker type (e.g. Career, Student, Limited, Academic, Contract, etc).
  Pay Rule – select the correct pay rule for the employee and set the Effective Date as their hire date.
  Device Group – Set to where employee will be clocking in and out. If the employee works in more than one department, set to “UCSB All Clocks.” If employee will not clock in anywhere, leave field as is.
  Badge Number – Enter last 7 digits of the employee ID (or if student, perm number). Hit Enter and the remaining badge information will auto fill.

Access Profiles
  Function Access Profile – Select one of the available UCSB Manager… profiles
  Display Profile – Select UCSB Manager (or, UCSB Manager – Faculty, when appropriate).
  Notification Profile – Select Email and Navigator.
  Generic Data Access Profiles (GDAP): Select Manager for Manager Profile, Forever as End Date; then click Save.

Manager Role – General
  Employee Group – Select the correct Employee Group which matches the employee’s working title.
    Check the Can see transferred employees box.
  Labor Level Transfer Set – leave as Empty Profile
  Pay Codes "Edit" Profile – set to Manager.
  Pay Codes "View" Profile – set to All Pay Codes.
  Work Rule Profile – Leave as Empty Profile.
  Reports Profile – set to Manager.

Employee Role –
  Time Entry Method –
    For Time Clock, Time Duration and Leave Time Employees, select Hourly View.
    For Timestamp Employees, select Time Stamp & Hourly View.
  Pay Codes "Edit" Profile – Select NE Hours Worked Employee or Exempt Employee.
How to Maintain a Manager Employee

Listed below are the required People Record fields for maintaining a manager employee. All other fields not mentioned below will either update automatically, or are not in use at this time.

PERSON TAB

Licenses
- Workforce Manager – Uncheck box when manager moves to a non-managerial position; otherwise, leave as is.

Accruals & Leave
- Accrual Profile – Select appropriate accrual profile (based on union representation/accrual codes), Start Date should be set to hire date and End Date to Forever. If an employee has reached a years of service milestone, enter an End Date for the current Accrual Profile; add a line and select the new Accrual Profile with the new Start Date and the End Date as Forever.
- Percentage – If employee is less than 100% enter their % according to their job description (e.g. 50%).

Contacts
- E-mail – Enter employee’s updated email address.

JOB ASSIGNMENT TAB

Primary Account
- Update access control number to reflect the assigned manager via the Timekeeping Manager Assignment (TMA) application at https://ma.timekeeping.ucsb.edu.

Primary Account
- Delete or change any unnecessary special function codes in the labor levels.
- Verify that any other labor levels are correct and have been updated accordingly.
- Confirm that the effective date matches the effective date of the new appointment.

Reports To – Select Search…, type in the manager’s last name followed by an asterisk, click Search, select the appropriate manager and click OK. If the manager does not show in the list it is because he/she has not been assigned a Workforce Manager license.

Timekeeper – review the following for any changes:
- Worker Type – Select the appropriate worker type (e.g. Career, Student, Limited, Academic, Contract, etc).
- Pay Rule – Select correct pay rule for the employee & set the Effective Date as their promotion/new appt start date.
- Device Group – Set to where employee will be clocking in and out. If the employee works in more than one department, set to "UCSB All Clocks." If employee will not clock in anywhere, leave field as is.
- Badge Number – Enter last 7 digits of the employee’s UCSB ID (or if student employee, enter their perm number). Hit Enter and the remaining badge information will auto fill.

Access Profiles
- Function Access Profile – Select one of the UCSB Manager… or UCSB Employee… profile options.
- Display Profile – Select UCSB Manager (or, UCSB Manager – Faculty, when appropriate).
- Notification Profile – Select Email and Navigator.
- Generic Data Access Profiles (GDAP): Select Manager for Manager Profile, Forever as End Date; click Save.

Manager Role – General
- Employee Group – Select the correct Employee Group which matches the employee’s working title.
- Check the Can see transferred employees box.
- Labor Level Transfer Set – leave as Empty Profile
- Pay Codes "Edit" Profile – set to Manager.
- Pay Codes "View" Profile – set to All Pay Codes.
- Work Rule Profile – Leave as Empty Profile.
Reports Profile – set to Manager.

Employee Role –
  Time Entry Method –
    For Time Clock, Time Duration and Leave Time Employees, select Hourly View.
    For Timestamp Employees, select Time Stamp & Hourly View.
  Pay Codes "Edit" Profile – Select NE Hours Worked Employee or Exempt Employee.
How to Handle Multiple Accrual Rates

When an employee has multiple appointments which result in multiple accrual rates, the following guidelines apply:

- Remember that Kronos can only have one accrual rate (i.e. accrual profile, see screenshot below) at any given time.

![Accruals & Leave Screenshot]

- As a rule, it is recommended to always configure Kronos to perform the most complex accrual calculation for your employees; then you can perform the simplest calculations and save yourself time and energy.

- If an employee has multiple of the same types of appointments (Academic or Non-Academic) then configure Kronos with the related accrual profile that applies to both/all appointments.

  If there are any subtle differences within the similar appointments (such as employee unit code or FLSA status), pick whichever accrual profile will correspond first to any Variable appointment or second to the appointment with the most anticipated hours worked.

- Kronos Payroll Managers are the only users with the capability to manually update (increase/decrease) employee accrual balances.

Supplemental Information

- Biweekly employees receive accrual grants on the day after each B2 pay period end date.

- Monthly employees receive accrual grants on the first day of each calendar month.

- See our training document titled, "How to Update Accrual Balances" (manual page 103) for additional guidance on the Payroll Manager’s ability to increase/decrease accrual balances.
How to Update Accrual Balances

NOTE: Only Kronos Payroll Managers can perform this action in Kronos.

1. From the Employee Roster/Quickfind widget, search for the employee needing an accrual update by typing an asterisk "*" in the search bar and clicking Find.

2. Click once on the employee(s) needing an accrual update to highlight/select their Kronos record.

3. Then click Accruals and Update.

4. Select the correct Accrual Code, amount and effective date for the addition or subtraction of the accrual update being made (for subtractions, place a minus sign before the amount) and then click OK. Note: the "update" does not reset the balance, it increases or decreases the current balance by the amount specified.

5. To check success/failure of the accrual update(s), click on the Group Edit Results widget in the Related Items Pane.

6. The success/failure will show as below. If successful, you are finished updating the accruals. If failure is indicated, click the Details link on the right side of the results log (screenshot below) and resolve the indicated error before attempting a second update.

7. To further validate the update(s), run an Accrual Detail Report in Kronos (see pages 39-41 of this manual for instructions).
How to Handle Holiday Hours for Part-Time Biweekly Employees

Calculating Biweekly (BW) Employee Hours of Holiday Pay Earned

1. Using a preferred search method in Kronos (e.g. Employee Roster/Quickfind, Pay Period Close, etc), select an appropriate Range of Dates as follows.

   **For Non-Represented, CX, DX, EX, SX and K8 Employees:**
   Select the biweekly pay period in which the holiday falls plus the biweekly pay period that immediately precedes it; then click Find.

   **For HX, NX, RX and TX Employees:**
   Select the two previous biweekly pay periods immediately preceding the biweekly pay period in which the holiday falls; then click Find.

   Please Note: Two biweekly pay periods represent 160.00 total regular hours available for work.

2. Count the total number of holidays which occurred during the selected range of dates; locate the related column in the table below and determine the Hours of Holiday Pay Earned by charting each employee’s hours worked during that range of dates in the appropriate column of the table below.

   **BIWEEKLY HOLIDAY PAY EARNINGS TABLE**

<table>
<thead>
<tr>
<th>HOURS ON PAY STATUS IN TWO (2) BIWEEKLY PAY PERIODS (160 HOURS)*</th>
<th>Hours of Holiday Pay Earned**</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 Holidays 120 Hours</td>
<td>4 Holidays 128 Hours</td>
</tr>
<tr>
<td>0 - 59</td>
<td>0 - 63</td>
</tr>
<tr>
<td>60 - 67</td>
<td>64 - 72</td>
</tr>
<tr>
<td>68 - 82</td>
<td>73 - 87</td>
</tr>
<tr>
<td>83 - 96</td>
<td>88 - 102</td>
</tr>
<tr>
<td>97 - 112</td>
<td>103 - 119</td>
</tr>
<tr>
<td>113 - 120</td>
<td>120 - 128</td>
</tr>
</tbody>
</table>

* Paid hours, excluding holiday hours.

** When more than one holiday occurs in a pay period, multiply the Hours of Holiday Pay Earned by the number of holidays for which the employee is eligible in the pay period to determine the total holiday hours with pay.
Inputting BW Employee Hours of Holiday Pay Earned (and Adjustments to Holiday Pay Earned)

1. Employees will have their holidays automatically display on their timecard.

2. Each Holiday will appear on the timecard in purple.  

3. If the employee is on less than 100% appointment, then the Holiday will need to be manually reduced.
   a. Insert a second line under the holiday.
   b. Select the Holiday pay code.
   c. Input in the hours to be deducted as a negative number (e.g. -4.0 Holiday).
   d. Click Save.

4. To Edit Multiple Employees’ Hours of Holiday Pay Earned:
   a. Highlight employees within Pay Period Close widget; Select Amount>Add.
   b. Select Holiday and Amount.
   c. Click OK.
   d. Access Group Edit Results widget to validate edits.
Addendum: Update Concerning Holiday Pay for Part-time Biweekly Paid Employees

Monday, April 14 2014

TO: Business Officers and PPS Preparers/Reviewers

From: Amy Arnold, Senior Human Resources Analyst

RE: Update Concerning Holiday Pay for Part-time Biweekly Paid Employees

Human Resources last issued guidance concerning holiday pay for part-time biweekly paid employees in April 2013. (See April 19, 2013 memo from HR to PPS Listserv.) Based on recent changes in contract language, Human Resources is updating the information previously shared in April 2013.

Holiday eligibility and the amount of holiday pay for biweekly paid employees are based on hours on pay status in biweekly cycles. In general, policy and contract language stipulates that a part-time employee must be on pay status at least 50% of the hours in the month or quadriweekly cycle (excluding holiday hours) to earn holiday pay.

For CX, DX, EX, SX, K8, and non-represented staff, a quadriweekly cycle is defined as the **biweekly pay period in which the holiday falls plus the biweekly pay period that immediately precedes it.** (The DX bargaining unit has been included in this group.)

For HX, NX, RX, PA, and TX staff, a quadriweekly cycle is defined as the **two pay periods immediately preceding the biweekly pay period in which the holiday occurs.** (The RX and TX bargaining units have been included in this group based on the newly ratified RX and TX contract language concerning Holidays.)

The Biweekly Holiday Pay Earnings Table is a helpful tool to determine eligibility and the amount of holiday pay earned for part-time biweekly paid employees. It is located under Useful Links at [http://www.hr.ucsb.edu/current-employees/managing-my-time-attendance](http://www.hr.ucsb.edu/current-employees/managing-my-time-attendance).

Please forward this message to the appropriate PPS contact for your department if it is not you. If you have questions concerning this guidance please contact me at extension 4068.

**Mail List:**

PPS-L
How to Understand Work Study and Kronos

Overview

Kronos manages employees paid with Work Study (WS) monies in the same manner as every other employee type. Following are important answers to common WS questions that relate to employment and Kronos:

How does the WS program work from a payroll/PPS perspective?

- Pre-PPS: Student contacts the WS office, prints out a WS referral document, and then gives the document to their employing department.
- PPS: based on the referral information, the employing department inputs an appointment and distribution in PPS for the student and makes sure to input the correct WS code on the distribution.
  - FYI – the WS code enables the employing department to receive WS funds to supplement their wage costs to employ the student.
- Post PPS/Kronos: Kronos will automatically import the PPS distribution for the employee and create a blank timecard for employee use. While PPS singly controls the use of WS funds to pay employees, it bases this payment amount on the following information:
  - For Variable appointments: reported hours on pay status (e.g. Hours Worked, Sick, Vacation, etc) from the employee’s Kronos timecard.
  - For Fixed appointments: the appointment percentage and wage rate specified on the PPS appointment and distribution.

What Kronos actions are needed to ensure accurate timekeeping for WS-funded employees?

- Ensure that all hours reported on each WS employee’s timecard are reviewed, approved and signed off in every pay period.
- Verify that the Primary Labor Account for each WS employee is correct during initial import, as well as subsequently during any period of overlapping WS distributions or changes in distributions.
  - FYI – Primary Labor Accounts (and thus distribution data) only automatically update in Kronos when an employee is first imported from PPS. After that point, manual updates must occur for any changes in Primary Labor Account, Access Control Number, etc.
- Communicate with Timekeeping Support (ets-timekeeping@ucsb.edu) whenever WS employees do not show up in Kronos within 2 business days from having an active PPS distribution and activated UCSB NetID.
- When a WS employee has an off-campus job, communicate with Timekeeping Support (ets-timekeeping@ucsb.edu) to facilitate creation of a Kronos timecard and other infrastructure necessary for payment of the employee’s wages.
- In summary, Kronos treats WS employees in the same manner as every other employee; however, there is extra PPS work (adding a WS code to each employee’s distribution) to do to ensure reported hours from Kronos are ultimately paid correctly by PPS.
How to Handle Workers’ Compensation

Employee Injury Occurs

1. Employee is injured at work.
2. Manager completes an incident report.
3. Employee should be sent to Occupational Health Center.
4. If questionable about being work-related, employee is placed on Disability until ruling completed.

Employee’s Use of Paid Leave

1. The employee’s "Day of Injury" should be recorded in Kronos using the Administrative Leave With Pay pay code.
2. Then there is a three day waiting period, if regularly scheduled, the employee uses sick time.
3. If the employee is still out of the office on the 4th day, then Worker’s Compensation will kick in and part of each day will be paid by the insurance and part by use of employee’s accrued leave.
4. The employee is required to use their sick time during this period, and can also elect to use their vacation and compensatory time.
5. If the employee is out of the office longer than 14 days, there will be a credit back to them of some of their sick time used during their three day waiting period.

Recording Time in Kronos

1. Sick time must be used first.
2. The three day waiting period is entered as Workers Compensation-Sick.
3. Once the insurance company starts paying Workers’ Compensation Benefits, part of each day away from work is paid by the insurance company and part is paid by the employee’s accruals. These calculations are sent to the department by the Campus Worker’s Compensation unit.
4. For each pay period specified by the Campus Worker’s Compensation unit, enter the hours of sick used as Workers Compensation-Sick.
5. Enter the employee’s remaining time as Workers Comp for the indicated pay period(s).
6. If the employee uses all of their accrued sick leave, they can elect to use Vacation time and/or compensatory time.
7. For each pay period specified by the Campus Worker’s Compensation unit, enter the hours of vacation used as Workers Comp-Vacation and compensatory time as Workers Comp-Comp Time Taken.
8. Once the employee has exhausted paid leave, they are placed on Extended Sick Leave for up to six months. They are paid 80% Extended Sick Leave and 20% Leave no Salary. Enter Workers Comp-Extended Sick and Workers Comp-LNS in Kronos. Input PPS transactions to reflect these changes specified by the Campus Worker’s Compensation unit.
9. During Extended Sick Leave, the money received from the insurance company in step C will be deducted from the employee’s pay checks.
How to Use The Timekeeping Manager Assignment Application

What is the Timekeeping Manager Assignment Application?

Timekeepers use the Timekeeping Manager Assignment application to configure each manager’s ability to see their employees’ Kronos timecards. This is done by assigning a manager’s Access Control Number (ACN) to an employee’s labor account and distribution. Timekeepers should no longer enter Access Control Numbers directly into Kronos, as this application will overwrite any such edits on a daily basis.

When Do I Use the Timekeeping Manager Assignment Application?

- When an employee is hired or transferred in to your department.
- When an employee’s distribution number changes.
- When an employee’s manager changes.

How Do I Use the Timekeeping Manager Assignment Application?

1. As soon as employee updates are complete in PPS, go to https://timekeeping.ucsb.edu. On the right side of the screen, click the "Timekeeping Manager Assignment Application" link. You can also go directly to: https://ma.timekeeping.ucsb.edu

2. Log on to the application with your UCSBnetID and password.

3. Determine which manager will manage the employee’s timecard. In the "Search" field, enter the ACN* of that manager. You can enter the full or partial number, click Search, and then select from the displayed results. You can also search by "Description" (Working Title). Click on the appropriate ACN in the returned results.

4. Enter the employee's Employee ID number into the Employee ID field and select the proper Distribution Number; then click Save. If the employee has multiple distributions managed by multiple managers, be sure to perform steps 3-4 for each distribution.

5. By 7:30 am on the business day following the completion of steps 1-4 above, the employee’s labor account list will be updated with the appropriate ACN(s), based on the information you have entered in the Timekeeping Manager Assignment Application. If you don’t follow this process and no manager assignment is made, the ACN portion of the primary labor account string may display a zero and the employee's timecard may not be visible to his or her manager.

6. If the employee transferred from another department or manager, the employee will continue to be assigned the old ACN from the previous manager, until a new one is assigned via the Timekeeping Manager Assignment Application. See the following pages for troubleshooting tips.
Troubleshooting: How to Correct Effective Dates in Kronos Due to Late PPS and/or TMA Entries

Two Scenarios

- A new PPS distribution is input for an employee AFTER the actual start date of that new PPS distribution (e.g., existing distribution effective 6/21/14 was updated with a new distribution effective 7/14/14 and was entered late in PPS on 8/09/14).
- An entry is made in the TMA too late for a manager to see their employee in the previous pay period.

What is Happening in Kronos?

The new PPS distribution can flow into Kronos as the Primary Labor Account; as part of a list of valid labor accounts called the Labor Level Transfer Set (LLTS); or as part of a Percent Allocation Rule (PAR). The import will include the TMA’s most recent related Access Control Number in the labor account string. The associated effective date is the day it gets imported into Kronos (i.e., the calendar day following the entry into PPS and/or TMA).

Three Possible Errors (Resulting From the Above Scenarios) and Their Solutions

Error 1: Managers cannot see their employee(s) in Kronos.

In the case of a late TMA entry, use one of the following solutions.

- Managers can search for their employees in the Pay Period Close widget for a date range that includes the time when the TMA assigned their Access Control Number to their employee(s). After finding the employee, the manager can then look backward or forward in time for the employee, as well as edit and approve the timecard(s) as needed.
- Alternately, if the above solution/accommodation is not acceptable, the department timekeeper can edit the effective date of the Primary Labor Account string to include the Manager’s Access Control Number on an earlier date (see instructions for the solution to Error 2 below).

In the case of a missing TMA entry, the timekeepers should access the TMA and input the manager’s Access Control Number per the instructions on the previous page.

Error 2: An employee’s Primary Labor Account has an incorrect effective date(s).

If the Effective Date of the Primary Labor Account (PLA) is incorrect, do the following.

1. Access the People Record > History button > Primary Account.

   ![People Editor](image)

   The Primary Account History dialog box will display; screen capture or note this information for use in the following steps.

2. The Primary Account History dialog box will display; screen capture or note this information for use in the following steps.
If any values in the current Primary Labor Account (PLA) are incorrect, please correct in PPS and/or the TMA first. Then resume any needed effective date corrections on the next business day.

3. Close the Primary Account History dialog box. Then navigate to the Job Assignment tab > Primary Account section. It should look something like this:

4. The following are common options for correcting effective dates in PLA history based on the starting point shown in 2 above. Corrections should be done for date ranges that have not yet been signed off. If corrections require going beyond existing sign-offs, please contact Timekeeping Support (ets-timekeeping@ucsb.edu)

- To edit PLA history to end the previous row sooner, in order to make the start date of the current PLA earlier, select the drop down arrow for the PLA field in the orange section ("e" in step 3 above), click Search, and populate the labor account values for the current PLA through the select window. After all values have been selected, click OK, type in the desired effective date (7/06/2014 in this example), and click Save. History update is complete as shown below (in comparison to the starting point shown in step 2 above).

- You can also click into the PLA field and type the values for the PLA manually, as well as use any recent PLA values populated in your drop down menu. Editing PLA history to make the start date of the current PLA earlier, in order to eliminate the previous row of incorrect history, is a two-step process.

  a. First, in the orange "e" field, enter the current PLA labor account values with the desired effective date (3/01/2014 in this example). This results in two history rows for the current PLA with the incorrect history still visible in between, as shown below.
b. Enter the current PLA labor account values again with the effective date that equals the start date of the history row you’re trying to eliminate (5/11/2014 in this example). History update is now complete as shown below.

<table>
<thead>
<tr>
<th>Primary Labor Account</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>720720/19900/0/0/0/0/11</td>
<td>1/18/2013</td>
<td>2/15/2014</td>
</tr>
<tr>
<td>720720/19900/0/0/2/210/0/11</td>
<td>2/16/2014</td>
<td>2/28/2014</td>
</tr>
<tr>
<td>760109/70000/0/0/2211/0/13</td>
<td>3/01/2014</td>
<td>Forever</td>
</tr>
</tbody>
</table>

- To edit PLA history to correct Access Control Numbers in the previous history row, enter the previous row labor account with the corrected Access Control value (2210 for ACN) and the previous row’s start date (2/16/2014 in this example). History update is complete as shown below.

<table>
<thead>
<tr>
<th>Primary Labor Account</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>720720/19900/0/0/0/0/11</td>
<td>1/18/2013</td>
<td>2/15/2014</td>
</tr>
<tr>
<td>720720/19900/0/0/2/210/0/11</td>
<td>2/16/2014</td>
<td>2/28/2014</td>
</tr>
<tr>
<td>760109/70000/0/0/2211/0/13</td>
<td>3/01/2014</td>
<td>Forever</td>
</tr>
</tbody>
</table>

**Error 3: An employee’s PAR is effective on the wrong date(s).**

Symptom of this error: Time is not splitting correctly for one or more days on an employee’s timecard.

**One solution to Error 3** is to fix the Internal PAR effective dates, as follows.


2. Scroll to and then click on the PAR needing the effective date change(s).
3. Select the most recent PAR version in the "Version Effective Dates" field.

4. To back-date the PAR effective date, click on "Create New Version Effective:" and enter the correct prior date, then click Save.

5. Next, click the most recent PAR version in the "Version Effective Dates" field, click Delete, and then OK.
6. The correct, back-dated PAR version should now display; this completes the editing process.

A second solution to Error 3 is to fix the External PAR effective dates (i.e., PAR History in the People Record) as follows. (Note: This solution is rarely necessary, but is documented in case you need it.)

1. Access the employee’s People Record > History > Percent Allocation Rule History.

2. The Percent Allocation Rule History dialog box displays; screen capture or note this information.

3. Navigate to the People Record > Job Assignment tab > Primary Account > Percentage Allocation Rule field:
4. To edit the current PAR effective date to be earlier than 8/1/14, because the related distributions (from which the PAR was created) were input late into PPS, simply enter the correct PAR with an effective date between the previous PAR’s Start and End Dates (7/7/2014 – 7/31/2014) on the row that’s highlighted orange and click Save.

<table>
<thead>
<tr>
<th>Percentage Allocation Rule</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>893681411 WALINGTON</td>
<td>8/01/2014</td>
</tr>
<tr>
<td>893681411 WALINGTON</td>
<td>7/25/2014</td>
</tr>
</tbody>
</table>

5. To edit the PAR effective date to be earlier than the previous PAR’s effective dates (before 7/7/2014), due to late PPS entry, there is a two-step process:

a. First enter the correct PAR with an effective date that’s the same as the start date of the previous PAR (7/7/2014) and click Save. The following screenshot displays the resulting “Empty Profile” PAR.

<table>
<thead>
<tr>
<th>Percentage Allocation Rule</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Empty Profile</td>
<td>8/01/2014</td>
</tr>
</tbody>
</table>

b. Second, enter the correct PAR with the same start date as the Empty Profile PAR that just displayed (8/1/2014) and then click Save.

<table>
<thead>
<tr>
<th>Percentage Allocation Rule</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Empty Profile</td>
<td>8/01/2014</td>
</tr>
<tr>
<td>893681411 WALINGTON</td>
<td>8/01/2014</td>
</tr>
</tbody>
</table>

The corrected PAR should now display (in this example, with the earlier effective date because the No PAR/previous row was overwritten).

<table>
<thead>
<tr>
<th>Percentage Allocation Rule</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>893681411 WALINGTON</td>
<td>5/20/2014</td>
</tr>
</tbody>
</table>

This completes the PAR effective date change procedure.
## Index of Primary Labor Accounts

<table>
<thead>
<tr>
<th>Category</th>
<th>Account</th>
<th>Fund</th>
<th>Project Code</th>
<th>Cost Center</th>
<th>Access Control</th>
<th>Special Function</th>
<th>Distribution Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example</td>
<td>760112</td>
<td>19900</td>
<td>STU6B</td>
<td>POLI7</td>
<td>DEPT11443</td>
<td>0</td>
<td>31</td>
</tr>
</tbody>
</table>

### Definition
- **Account**: Account listed in PPS distribution.
- **Fund**: Fund listed in PPS distribution.
- **Project Code**: Dept-specified project identification code in PPS Distribution.
- **Cost Center**: Dept-specified cost identification code in PPS Distribution.
- **Access Control**: Number associated with the managerial position to which the employee reports.
- **Special Function**: Code to aide certain automated transfers of hours.
- **Distribution Number**: Distribution number listed in PPS.

*Note: The per employee logic used by Kronos to determine which PPS distribution will define the Primary Labor Account is as follows:*

1. Exclude from consideration all appointments with the following title codes: 2310, 2311, 3570, 3800 and 3999. All others are eligible for consideration as the Primary Labor Account based on the:
2. Distribution with highest percentage of appointment; if all are equal, the next consideration is:
3. Distribution with latest (most recent) begin date; if all are equal, the next consideration is:
4. Distribution with highest pay rate; if all are equal, the final consideration is:
5. Distribution location in the Kronos Employee Database table.
# Index of Pay Rules

## Naming Convention Guide – Pay Rules

<table>
<thead>
<tr>
<th>Category</th>
<th>Employee Unit Code</th>
<th>*FLSA</th>
<th>Appointment Type</th>
<th>Overtime Compensation</th>
<th>Schedule Type</th>
<th>Lunch Deduction</th>
<th>Overtime Criteria</th>
<th>Other Work Patterns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example</td>
<td>99</td>
<td>NE</td>
<td>Career</td>
<td>Pay</td>
<td>Open</td>
<td>30</td>
<td>40OT</td>
<td></td>
</tr>
</tbody>
</table>

### Definition
- **Employee relations unit**
- **FLSA designation**
- **Appointment designation**
- **Determines if overtime is paid or banked as comp time**
- **Restricts punches to a defined schedule**
- **Length and interval of automatic lunch deduction**
- **Daily or weekly overtime criteria**
- **Other work patterns**

### Common Sample Values

<table>
<thead>
<tr>
<th>99 (non-rep)</th>
<th>Exempt</th>
<th>Career</th>
<th>Bank</th>
<th>Open</th>
<th>30</th>
<th>10OT, 24hr</th>
</tr>
</thead>
<tbody>
<tr>
<td>501, BX, CX, EX, FX, HX, LX, NX, PA</td>
<td>NE (Nonexempt)</td>
<td>Contract</td>
<td>Pay</td>
<td>Restricted</td>
<td>30@4</td>
<td>30OT, MO</td>
</tr>
<tr>
<td>501, BX, CX, EX, FX, HX, LX, NX, PA</td>
<td>NE (Nonexempt)</td>
<td>Faculty</td>
<td>Pay</td>
<td>Restricted</td>
<td>45</td>
<td>4-10,</td>
</tr>
<tr>
<td>501, BX, CX, EX, FX, HX, LX, NX, PA</td>
<td>NE (Nonexempt)</td>
<td>Limited</td>
<td>Pay</td>
<td>Restricted</td>
<td>60</td>
<td>980</td>
</tr>
<tr>
<td>501, BX, CX, EX, FX, HX, LX, NX, PA</td>
<td>NE (Nonexempt)</td>
<td>Per Diem</td>
<td>Pay</td>
<td>Restricted</td>
<td>75</td>
<td>SD</td>
</tr>
<tr>
<td>501, BX, CX, EX, FX, HX, LX, NX, PA</td>
<td>NE (Nonexempt)</td>
<td>Student</td>
<td>Pay</td>
<td>Restricted</td>
<td>Pnch Lunch</td>
<td></td>
</tr>
</tbody>
</table>

### Details
- **Required Field**
- ***Required Field**
- ***Required Field**
- **Optional Fields**

*Note: The FLSA and Appointment Type components of each pay rule are only specified where that distinction is needed.*
Employee Function Access Profile Dictionary

There are three Function Access Profiles (FAPs) available for use in setting up employees in Kronos. The information below summarizes the associated timecard functionality and types of employees to whom these FAPs can be assigned:

**UCSB Employee-leave entry**
- **Timecard functionality:**
  - can enter leave pay codes (e.g. Vacation, Sick, CT Taken, etc)
  - does not have access to Hours Worked pay code
- **Employee assignment:**
  - assign to exempt employees
  - assign to non-exempt employees using time clock or timestamp functionality to record time

**UCSB Employee-leave entry + hrs worked**
- **Timecard functionality:**
  - can enter leave pay codes (e.g. Vacation, Sick, CT Taken, etc)
  - has access to Hours Worked pay code
- **Employee assignment:**
  - assign to non-exempt employees
  - can be used in conjunction with timestamp or time clock functionality to allow non-exempt employees to both punch and enter hours worked

**UCSB Employee-punch in and out + no leave entry**
- **Timecard functionality:**
  - does not have access to enter leave pay codes (e.g. Vacation, Sick, CT Taken, etc)
  - does not have the access to Hours Worked pay code
- **Employee assignment:**
  - assign to non-exempt employees using time clock or timestamp functionality to record time

The other FAPs (UCSB Manager, UCSB Manager-Faculty, and UCSB Timekeeper+Payroll Manager) were not included because they are self-explanatory and assigned to anyone in the related Kronos role.
## Index of Accrual Profiles

*Naming Convention Guide – Accrual Profiles*

<table>
<thead>
<tr>
<th>Category</th>
<th>Employee Unit Code</th>
<th>FLSA</th>
<th>Accrual Level</th>
<th>Other Accrual Specifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example</td>
<td>99</td>
<td>Non Ex</td>
<td>B</td>
<td></td>
</tr>
</tbody>
</table>

### Definition

<table>
<thead>
<tr>
<th>Common Sample Values</th>
<th>Employee relations unit</th>
<th>FLSA designation</th>
<th>Accrual level designation per years of service credit</th>
<th>Allows unique configuration to accommodate specific accrual-related needs.</th>
</tr>
</thead>
<tbody>
<tr>
<td>99 (non-rep)</td>
<td>EX/Exempt</td>
<td>A, A or G</td>
<td>Dispatcher</td>
<td></td>
</tr>
<tr>
<td>501, BX, CX, EX, FX, HX, LX, NX, PA Academic</td>
<td>Nonex/Non</td>
<td>B, B or H</td>
<td>Limited</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ex/Nonexempt</td>
<td>C, C or J</td>
<td>No Sick</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>D, D or K</td>
<td>Non-8</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>E, F, N</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Details

<table>
<thead>
<tr>
<th>Required Field</th>
<th>Optional Fields</th>
</tr>
</thead>
</table>

*Note: The elements of each Accrual Profile are only specified where distinction is needed.*
# How to Understand Auto-Default Fields in Kronos Version 7

<table>
<thead>
<tr>
<th>FIELD LOCATION AND TITLE</th>
<th>DESCRIPTION OF AUTO-DEFAULT DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PEOPLE RECORD: Person Tab</strong></td>
<td></td>
</tr>
<tr>
<td>Accruals &amp; Leave</td>
<td>Accrual Profile auto-defaults for Career and Student employees based on title code. Non-Career or Non-Student will require timekeeper to setup.</td>
</tr>
<tr>
<td><strong>PEOPLE RECORD: Job Assignment Tab</strong></td>
<td></td>
</tr>
<tr>
<td>Primary Account</td>
<td>Primary Labor Account (PLA) auto-updates daily. *NEW: Access Control number must be assigned to each employee via Timekeeping Manager Assignment application. Auto-updates to PLA won’t work for back dating Effective Date situations.</td>
</tr>
<tr>
<td>Percent Allocation Rule (PAR)</td>
<td>PAR auto-updates daily for all relevant employees, specifically any employee with all fixed appointments, regardless of working in multiple departments (some departments may be excluded).</td>
</tr>
<tr>
<td>Timekeeper</td>
<td>Worker Type auto-defaults Pay Rule auto-defaults ONLY for new hires and re-hires; this is based on their employee unit code, employment type and FLSA information; If the interface logic cannot find a pay rule for a new or re-hired employee, it will default them to New Hire, which is a clue to the related department to contact Timekeeping Support (<a href="mailto:ets-timekeeping@ucsb.edu">ets-timekeeping@ucsb.edu</a>) and seek creation of a new pay rule.</td>
</tr>
<tr>
<td>Access Profiles</td>
<td>FAP auto-updates to: UCSB Employee-punch in and out + no leave entry for Students. UCSB Employee-leave entry + hrs worked for Nonexempt employees. UCSB Employee-leave entry for Exempt employees. UCSB Manager for Faculty employees.</td>
</tr>
<tr>
<td>Display Profile</td>
<td>Display Profile auto-updates to: UCSB Faculty for Faculty employees. UCSB Employee for all non-faculty employees.</td>
</tr>
<tr>
<td>Notification Profile</td>
<td>Auto-defaults to &quot;Email and Navigator&quot;.</td>
</tr>
<tr>
<td>Generic Data Access Profiles (GDAP)</td>
<td>GDAP auto-updates to: Manager, if the employee has a Manager License but no GDAP yet.</td>
</tr>
<tr>
<td><strong>Manager Role – General</strong></td>
<td>Only Faculty Managers have auto-defaulted manager fields.</td>
</tr>
<tr>
<td>Employee Group + check box</td>
<td></td>
</tr>
<tr>
<td>Labor Level Transfer Set</td>
<td></td>
</tr>
<tr>
<td>Pay Codes Edit</td>
<td></td>
</tr>
<tr>
<td>Pay Codes View</td>
<td></td>
</tr>
<tr>
<td>Reports Profile + check box</td>
<td></td>
</tr>
<tr>
<td><strong>Employee Role</strong></td>
<td></td>
</tr>
<tr>
<td>Labor Level Transfer Set</td>
<td>Variable employees in conjunction with new &quot;short name&quot; for labor level transfer sets – transfer hours directly to the correct labor account from which a shift is to be paid.</td>
</tr>
<tr>
<td>Time Entry Method</td>
<td>Auto-defaults to &quot;Time Stamp &amp; Hourly&quot; for Student employees. All other employees will auto-default to Hourly.</td>
</tr>
<tr>
<td>Pay Code &quot;Edit&quot; Profile</td>
<td>Auto-defaults based on employee type for new and re-hires only.</td>
</tr>
</tbody>
</table>