

Systems Speak

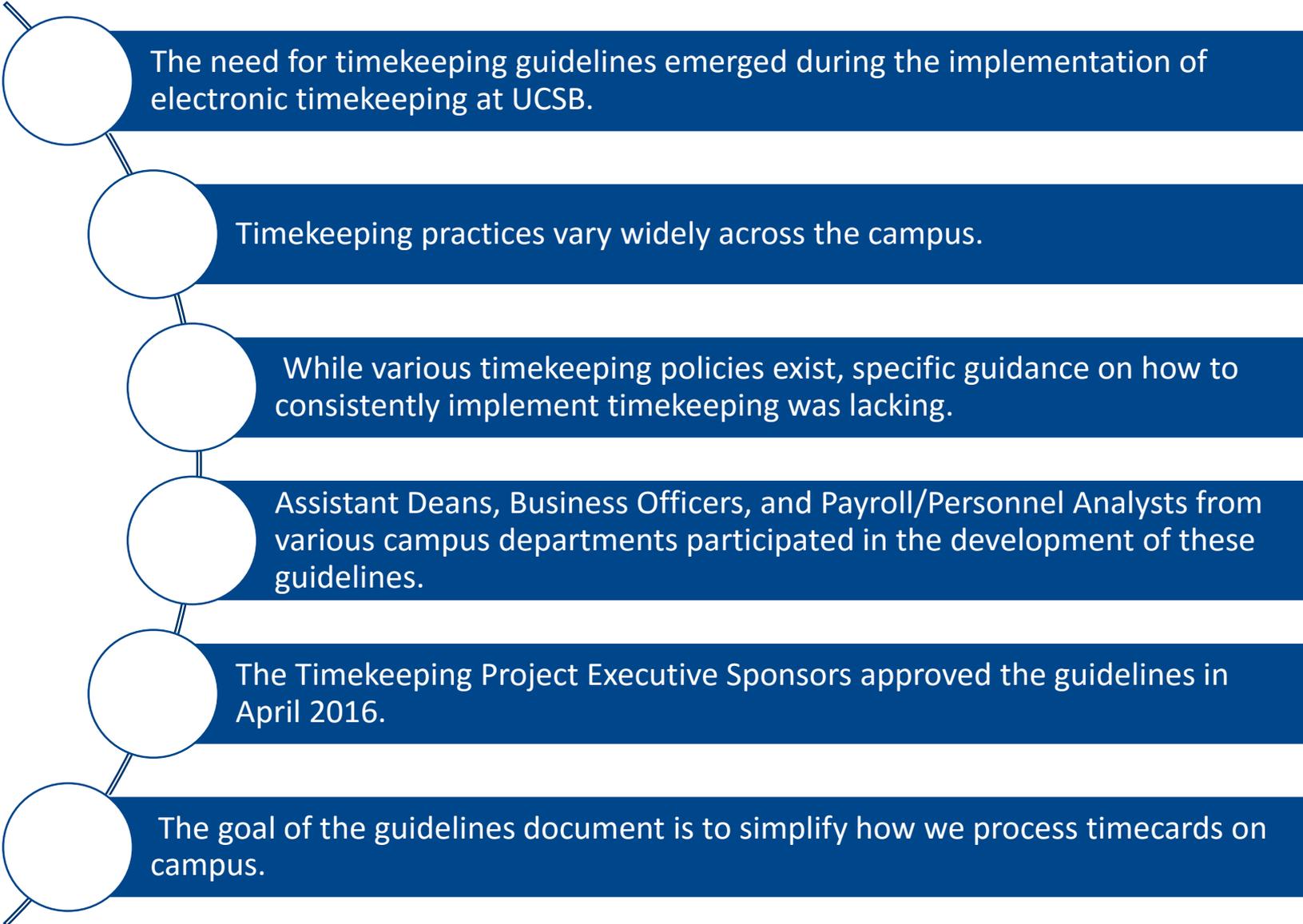
Timekeeping Guidelines

June 17, 2016

UC SANTA BARBARA

Timekeeping

the recording of hours worked and leave taken



The need for timekeeping guidelines emerged during the implementation of electronic timekeeping at UCSB.

Timekeeping practices vary widely across the campus.

While various timekeeping policies exist, specific guidance on how to consistently implement timekeeping was lacking.

Assistant Deans, Business Officers, and Payroll/Personnel Analysts from various campus departments participated in the development of these guidelines.

The Timekeeping Project Executive Sponsors approved the guidelines in April 2016.

The goal of the guidelines document is to simplify how we process timecards on campus.

Agenda

Timekeeping Guidelines

1. Introduction & Agenda
- 2. Appointment Types**
3. Timecards
4. What's Changing?
5. Roles and Responsibilities
6. Workload Changes
7. Questions & Comments

Appointment Types

Non-Exempt

paid overtime or allowed to earn overtime compensatory leave at time and a half for all hours worked over 40

Exempt

paid an established salary based on percentage of effort

Positive Pay (Variable)

paid on an hourly basis and must record the hours they work each day in order to receive a paycheck

Exception Pay (Fixed)

paid the percent time that is on their active distributions in the payroll system

Appointment Types

Non-Exempt Employees

- Paid based upon hours recorded on timecard
- **Required** to record their hours worked
- Expected to record absences (paid or unpaid)

Exempt Employees

- Paid a pre-determined, established salary
- **Not required** to record their hours worked
- Expected to record absences (paid or unpaid)

Non-Exempt Employee Timecards

Must contain:

Employee's name

Record of time worked each day

Record of absences (*with or without pay*)

Employee's verification of time submitted

Employee's manager/supervisor approval

Timecards for split-funded, non-exempt, variable employees must also include fund source designation.

Exempt Employee Timecards

Must contain:

Employee's name

Record of absences (*with or without pay*)

Employee's verification of time submitted

Employee's manager/supervisor approval

Timecards for exempt, variable employees, such as Readers and Tutors, must include a record of time worked each day.

Payment Types

Positive Pay (Variable)

- Hours worked are uploaded to the payroll system
- All Positive Pay employees are required to record daily hours worked and absences

Exception Pay (Fixed)

- Leave taken is uploaded to the payroll system
- Non-Exempt, Exception pay employees are required to record daily hours worked and absences

Positive Pay (Variable) Appointment Types

- Non-exempt casual-restricted appointments (e.g. Student Assistants)
- Non-exempt limited staff appointments
- Non-exempt per diem appointments
- Exempt hourly student academic appointments (e.g. Readers, Tutors)

Exception Pay (Fixed) Appointment Types

- Exempt career and contract staff appointments
- Non-exempt career staff appointments
- Exempt academic appointments
- Exempt student academic appointments (e.g. GSRs)

Is a timecard required?

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

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Who uses timecards?

Employees who submit hours worked and/or are eligible to accrue leave

Examples of employees who are **NOT** required to maintain a timecard:

- Faculty
- Teaching Associates and Teaching Assistants (TAs)
- Graduate Student Researchers (GSRs) and other exempt Academic Employees appointed below the percent threshold for leave accrual eligibility
- Lecturers and other Unit 18 employees
- By Agreement (BYA) Appointments

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What's changing?

Today

Exempt Employees who are not eligible to accrue leave no longer need a timecard (GSRs).

Fund source is not certified on timecards and is only a required element if an hourly positive pay employee is paid on more than one fund source.

Paid overtime for biweekly exception-paid employees who use Electronic Timekeeping (Kronos) is automatically uploaded to PPS.

August 2016

The overtime approval process in Kronos will be removed. As time is recorded, calculated overtime will flow directly to the appropriate pay codes without requiring an intermediary approval process. Per UCSB policy, overtime and over-schedule must be approved in advance, but if overtime or over-schedule is worked it must be compensated whether approved or not.

January 2017

(projected)

Kronos will NOT calculate vacation and sick accruals. Balances will be imported from PPS. Balance limits will be removed in Kronos since PPS is the system of record for managing maximum balances. The ability to update accrual balances will be removed in Kronos as data will be coming from PPS.

Why is timekeeping changing?

Simplify the timekeeping process

Promote consistent, policy-driven practices

Fund source and percent of time are not listed as required timecard elements in the Office of Management and Budget Uniform Guidance and UC policy.

Employee's percent of time is determined by appointment distribution in PPS

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Employees' Responsibilities

- Submit timecard by pay period end
- Exempt employees: record all absences (paid or unpaid) in full day increments
- Non-exempt employees: record hours of work and/or all leave (paid or unpaid) to the nearest quarter hour
- Best practice is for employees to enter hours worked and/or leave taken on a daily or weekly basis

Manager/Supervisor Responsibilities

- Review and approve employee hours worked and/or leave taken on a biweekly or monthly basis
- If necessary, work with the employee and/or departmental payroll staff to correct errors
- In special circumstances, approval may be delegated to an individual with direct knowledge of the employee's responsibilities and schedule

Department Payroll Staff Responsibilities

- Review timecards prior to payroll upload deadline
- When there are incomplete timecards or errors, work with the individuals to finalize timecards
- For shared employees, coordinate as necessary with other departmental payroll staff/payroll managers
- Complete final review prior to the payroll upload deadline, review post-audit reports to ensure hours were reported as expected, and initiate corrections as necessary
- Monitor holiday pay process for Positive Pay employees

Timecard Due Dates

Payroll Schedule	Employee Due Date	Employee No Later Than Date	Manager/ Supervisor Due Date	Manager/ Supervisor No Later Than Date
Biweekly	Last day worked or pay period end (PPE)	5pm Monday after pay period end (PPE)	Day after pay period end (PPE)	Noon on Tuesday after pay period end (PPE)
Monthly – Positive Pay	Last day worked or 15 th which is the PPE	18 th or as determined by the department	Day after PPE	19 th or as determined by department
Monthly – Exception Pay	Last day worked or PPE	3 rd day after PPE	Day after PPE	5 th day after PPE

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Graduate Student Researchers (GSRs)

Opportunities for Workload Changes

- Eliminate completing any timecard
- Transition to exception pay (fixed)

Improved Audit Controls

- Receive communication regarding appointment and funding changes

Faculty, Principal Investigators, and/or Hiring Managers

Opportunities for Workload Changes

- Eliminate timecard approval for GSRs and other employees who no longer need them
- Ensure timely certification of funding distribution documentation

Improved Audit Controls

- Clear communication with department payroll staff for any changes to PPS appointment and/or distribution
- Clear process for monthly review of financial statements and salary projections

Department Payroll Staff

Opportunities for Workload Changes

- Eliminate generating, distributing, and collecting paper timecards for employees who no longer need them

Improved Audit Controls

- Strengthened and simplified backup for PPS actions
- Accountability placed on Faculty, Principal Investigators, and/or Hiring Managers
- Timely and detailed communication with employees regarding change in PPS appointment or distribution

Questions/Comments