

September 29, 2022

A large, circular stone labyrinth is built on a sandy dune. The labyrinth consists of multiple concentric, slightly irregular rings of flat, grey stones. The dune is surrounded by low-lying green and yellow vegetation. In the background, there are several tall, dark green trees. Beyond the trees, the blue ocean stretches to the horizon under a clear blue sky with wispy white clouds. A small coastal town is visible on the right side of the horizon.

Mini Tune-Up: Shared Employees

Electronic Timekeeping

Mini Tune-Up Session Info

Objective

- To provide campus Payroll Managers and Timekeepers additional training, resources, and assistance for various Timekeeping topics.

Format

- 45 min sessions via Zoom Webinar
- Questions can be submitted throughout presentation
- Recording, Presentation, and Q&A posted on website

Agenda

- Training Objectives
- Shared Employees
 - What, When and How to work with Shared Employees
 - Case Studies
 - Summary, Resources
- Prepared Q&A
- Live Q&A

Training Objectives

By the end of this session, Payroll Managers and Timekeepers should understand:

- Definition of a Shared Employee
- Verifying a Shared Employee's Labor Level Transfer Set
- Queries for Payroll/Shared Employees
- Transferring an Employee's Time
- Timecards for Shared Employees

Introduction

Today's MTU will primarily focus on:

- **Shared Employees**
- **Working with and reporting shared employees**

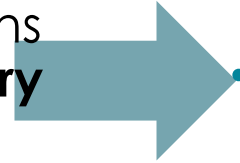
Poll:

I feel comfortable working with timecards for shared employees in my department. I understand how shared employees should record time and may interact with multiple departments.

Overview: Shared Employees

Definition

- *An Employee who has multiple active positions from multiple departments, that record time in Kronos*
- Only one of these positions will show up as the **primary (default)** position



Factors

- One timecard
- Primary Labor Account (PLA)
- PLA is system derived
- Transfer time to report hours

Overview: Shared Employees

Where can we find the distinction between the positions for Shared Employees?

- Employee's Labor Level Transfer Set (LLTS)
- Nav: People Editor > Job Assignment tab > Employee Role

Employee Role

Labor Level Transfer Set:

1999999 Student

New

Edit

Restrict manager timecard approvals to the manager's Approval Set

| Time Entry Method | | |
|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Time Stamp & Hourly View |
| <input type="checkbox"/> | <input type="checkbox"/> | Hourly View |
| <input type="checkbox"/> | <input type="checkbox"/> | Time Stamp & Hourly View |
| <input type="checkbox"/> | <input type="checkbox"/> | |

Pay Codes "Edit" Profile:

NE Hours Worked Emplo...

Pay Codes "Restricted" Profile:

Empty Profile

Work Rule Profile:

Empty Profile

Reference: [How to Verify a Shared Employee's Labor Level Transfer Set in Kronos](#)

Overview: Shared Employees

LLTS detail; Full Account String for all (active) positions

- Navigation: click "Edit" and "Configure Accounts"

Labor Level Set Editor

Name: 19999999 Student

Loaded: 11:14AM



Description: Test Student

Use In: Labor Level Transfer Sets

Select Entries

Configure Accounts

Select All

Show Authorized Only

| Valid Account | Authorized | Work rule |
|-------------------------------------|-------------------------------------|-----------|
| MATH/0/0/0/MATH12000/16.00/40073055 | <input checked="" type="checkbox"/> | |
| ECON/2/0/0/0/14.00/40071208 | <input checked="" type="checkbox"/> | |

Case #1: The Importance of the Primary Position

- David is a part-time employee with **BARN (FTE = .25)** as the Brand Manager, and revitalizes the store
- He dreams of becoming an entrepreneur
- David will also work at **ROSE (FTE = .50)**



Case #1: David's Primary Position



BARN hears he's started a new job with **ROSE**, but now Wendy can no longer see David in Kronos

Poll:

Why can't **BARN** see David's timecard?



Case #1: The importance of the Primary Position

Why can't BARN see David's timecard?

- ❑ Once you get a new job, they let you go from the old position
- ❑ Kronos doesn't know how to account for two jobs and errors out
- ❑ Kronos uses the most recent UCPath job data to decide which job is active
- ❑ The Primary Labor Account changed to the new position in ROSE



Case #1: The importance of the Primary Position

Why can't BARN see David's timecard?

- ❑ Once you get a new job, they let you go from the old position
- ❑ Kronos doesn't know how to account for two jobs and errors out
- ❑ Kronos uses the most recent UCPath job data to decide which job is active
- ✓ **The Primary Labor Account changed to the new position in ROSE**



Solution: Verifying David's Primary Labor Account

David's (new) Primary Labor Account = **ROSE**

Why can't **BARN** see him?

- Full Time Equivalent (FTE)
- Primary Labor Account changed
- All BW > **All Home and Eligible Transfer**

David needs to transfer his time to **BARN & ROSE**

Primary Labor Accounts can change at any time/dynamic



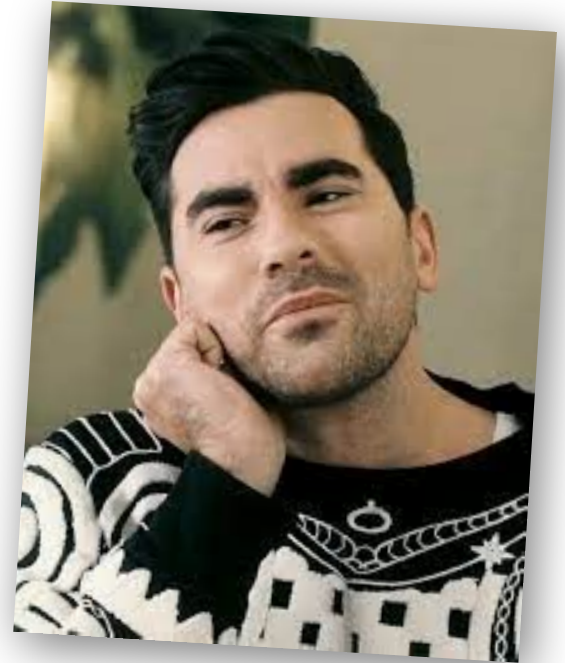
Reference: [Best Queries for Payroll Processing in Kronos](#)

Primary Labor Accounts Designation

4 factors based on the position (if all equal, next evaluation factor)

- Highest Full Time Equivalent (FTE) percentage
- Latest (most recent) begin date
- Highest Pay Rate
- Highest numerical value (position number)

David = 1st criteria



Reference: [Labor Level Definition & Purpose](#)

UC SANTA BARBARA

See All Shared Employees

View Shared Employees using queries

- Home = active in dept (PLA)



All Home and Eligible Transfer

- Both home & shared employees = widest visibility
- Criteria: HOME dept - PLA is home dept
- Eligibility: shared employees who can transfer time



Helpful tip:

You can view an employee's PLA history, by going to People Editor > History > Primary Account

Reference: [Best Queries for Payroll Processing in Kronos](#)

Case #2: Alexis Inactive Employment

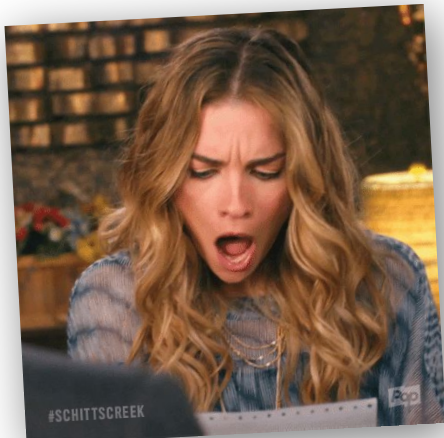
- Alexis works at **ROSE** and will also work at **VETS**
- To pursue her passion, Alexis leaves her position at **VETS**
- Ted will review time on Mon 10/3. He enters her termination date (Fri 9/30)
 - Next BW upload is Tues 10/4
- Alexis didn't enter all her time!



Case #2: Alexis Inactive Employment

- Alexis is not visible on **VETS** roster
- Ted missed reviewing/editing her timecard

When Ted finalized payroll, he used the All Home and Eligible Transfer for Previous Pay Period



How should Ted have handled this situation?

Case #2: Alexis Inactive Employment

How should Ted have handled this situation?

- ❑ Since VETS can't see the timecard, they need to ask BFS to cut her a check
- ❑ VETS should ask the ROSE timekeeper to add VETS time to Alexis' timecard
- ❑ VETS should have found a way to view her timecard and transfer the time on Alexis' behalf (before the upload)
- ❑ VETS should ask for a Historical Correction for any missed pay



Case #2: Alexis Inactive Employment

How should Ted have handled this situation?

- ❑ Since VETS can't see the timecard, they need to ask BFS to cut her a check
- ❑ VETS should ask the ROSE timekeeper to add VETS time to Alexis' timecard
- ✓ **VETS should have found a way to view her timecard and transfer the time on Alexis' behalf (before the upload)**
- ❑ VETS should ask for a Historical Correction for any missed pay



Solution: Alexis' time can be submitted by VETS



Ted needs to use a workaround to see her timecard

All Home and Transferred In query;

- Employees' position is terminated
 - They have previously transferred time to department
- Criteria: Best for Previous Pay Period & inactive shared employees

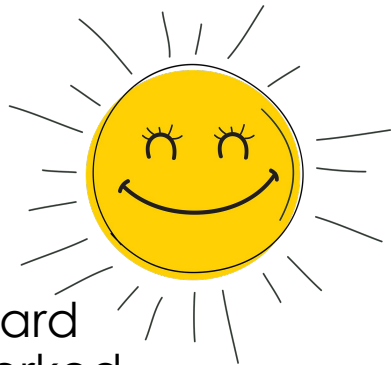


Ideally: Employees should enter their own time, prior to their final day (when their position is terminated) in the department

Transferring time on a shared employee's timecard

Ideally: **LESS WORK**

Shared employee transfers their own time on their timecard



Steps

1. Access Timecard
2. Enter hours worked
3. Select job

Manual Transfer: **MORE WORK**

Review information on timecard, to verify valid account(s);

1. View Primary Account and hours
2. Check Labor Level Account(s)
3. Review Labor Level Transfer Set
4. Confirm through Labor Level Set Editor
5. Navigate to employee's timecard
6. Click the "Transfer" cell for the correct shift
7. Click on "Labor Account" and add the account string according to what you saw in the employee's Labor Level Transfer Set = Transfer window
8. Click 'Apply'
9. Add a comment (*optional)



Reference: [How to Transfer an Employee's Time on their Kronos Timecard](#)

Case #3: Moira's Position Terminates

- Moira's **WINE** schedule is (MON-WED)
- Punches in and out
- Employee-specific scheduled hours
- **WINE** signs off (on SUN) - thinks of Moira as a terminated employee



- **CROW** films (THUR-SAT) in Bosnia
- Works as many hours needed (non-scheduled)
- Attempts to enter **CROW** hrs on MON

'Sharing' Moira's timecard

Outcome: she isn't able to enter any hours

What one department does affects the other;

- One timecard for shared employees
 - Approvals, sign-off, configuration
- Does this employee have another position?
- Should their Kronos licenses be removed?



Communicate with other departments

WINE wanted to close out her employment

- didn't know she was still working with **CROW**

Tip: Active positions (check in Person Org Summary in UCPath)

Scenario: If her job ended within the current pay period (ex. 9/28)

- ★ Moira will still be visible in **Current Pay Period** view
- ★ She won't be visible in the **Next Pay Period** (no active position)
- ★ BW and MO pay periods timing (MO may linger a little longer)



Sharing is Caring

- Etiquette with Shared Employees
- Communication with home/other departments
- Transferring time - default Primary Lab Account
- Waiting to approve / sign off on shared employees
 - If one department signs off before another
 - ETS ticket needs to be submitted
- Reminder for timecard accuracy and timeliness, to make sure pay is not impacted/delayed [Reviewing Timecards in Kronos](#)
- Terminating / Terminated Employees -> Licenses should not be removed without confirming/checking status for shared employee/accounts



Takeaways for Shared Employees

- Shared employees may require extra handling
- Departments should coordinate
 - Requesting sign off removal
 - Terminating employees



- When using the following queries, be sure that you're noting that this includes shared employees;
 - All Home and Eligible Transfer (active shared employees)
 - All Home and Transferred In (transferred time before to your department) best way to find terminated / active employees

Summary

- The Primary Labor Account is dynamic, and can change without notice, (i.e., even though an employee was once visible on your roster and now is no longer visible, doesn't mean they've left (**David**))
- If one position is no longer active, keep a close watch to make sure all reported hours and departments have been accounted for (**Alexis**)
- Departments with shared employees should review set-up and configuration, to avoid unintended consequences (**Moira**)



Resources

- [Timekeeping Website](#)
- Submit a [Kronos Timekeeping Question or Request](#)
- The [Timekeeping calendar](#) references important dates
- [How to Verify a Shared Employee's Labor Level Transfer Set in Kronos](#) KB article helps with finding a shared employees Primary Labor Account
- [Best Queries for Payroll Processing in Kronos](#) KB article helps you see your home department and shared employees in Kronos
- [How to View History in the Kronos People Editor](#) KB article helps you see the active job/Primary Labor Account & LLTS
- [How to Transfer an Employee's Time on their Kronos Timecard](#) KB article helps with transferring time for shared employees
- [Reviewing Timecards in Kronos](#) KB article helps with reviewing employees in your home/shared departments

Last Poll

Poll (round 2):

I feel comfortable working with timecards for shared employees in my department. I understand how shared employees should record time and may interact with multiple departments.



THANK YOU!

Questions?

Live Q&A: Managerial Visibility

Q: I have a supervisor that cannot see the timecards for his employees. UCPATH and Kronos both have the supervisor as “reports to”. Is there another setting I should adjust so this supervisor can see the timecards for his employees?

A: We can troubleshoot specific issues regarding managerial visibility if you submit a ticket. Manager visibility is configured using an Employee Group in Kronos and an ACN assignment in TMAA.

Live Q&A: Primary Labor Accounts

Q: Are two primary labor accounts needed if the student works for two different departments?

A: There can only be one Primary Labor Account. Any position that is not the Primary Labor Account can be found in the Labor Level Transfer Set.

Live Q&A: Removing Licenses pt. 1

Q: What is the consequence of not removing licenses?

A: The timing (and potential consequences) for license removal can depend on a specific employee's situation. Instead of removing licenses, do not sign off an employee if you do not want hours to upload.

We have a previous MTU on Final Timecards & Removing Licenses if you want to learn more:

<https://www.timekeeping.ucsb.edu/blog/mini-tune-sessions/final-time-cards-removing-licenses>

Live Q&A: Removing Licenses pt. 2

Q: What problems does not ever removing the licenses cause to avoid these risks?

A: There is a monthly process to remove licenses if not handled by the department.