

February 18th, 2021



# Mini-Tune Up: Effective Dates

## Electronic Timekeeping

# Mini Tune-Up Program

## Objective

- Mini Tune-Ups are designed to give campus payroll managers and timekeepers additional training, resources, and assistance for various Timekeeping topics.

## Principles

- Sessions are conducted and recorded via Zoom Webinar
- Sessions will be scheduled for 45 min (Presentation and Q&A)
- All session materials will be available on the website
- Questions can be submitted two ways:
  - **Prior** to the session via MTU page
  - **During** the session via Q&A
- Future topics can be suggested via MTU page

# Agenda

- Knowledge Base Introduction (Elliott Lee)
- Training Objectives (Tracey Nguyen)
- Effective Dates (Tracey Nguyen)
  - Key Points
  - Use Cases
    - Pay Rule
    - Accrual Profile
- Questions

# Training Objectives

Timekeepers and Payroll Managers should understand:

- When to use the correct effective date
- How effective dates affect payroll
- How effective dates affect accruals and accrual imports

# Introduction

In this mini-tune up session, we will be discussing

- **when and how to use effective dates in Kronos**

Primary focus on

- **Pay Rules and Accrual Profiles**

Survey Question

# Effective Dates - Accrual Profile

## Under Accrual Profile

- (People Editor > Person tab > Accruals & Leave > Accrual Profile)

TEST, EXEMPT2 1 of 1 523123123 Loaded: 4:23 PM

History Licenses Refresh Save Go To

Person Job Assignment

▼ Accruals & Leave

		Accrual Profile *	Start Date *	End Date *
+	×	99 Exempt E no Sick	3/01/2020	3/31/2020
+	×	LX D	4/01/2020	4/30/2020
+	×	99 Exempt A or G	5/01/2020	Forever
+	×			

# Effective Dates - Pay Rule

## Under Pay Rule

- (People Editor > Job Assignment tab > Timekeeper > Pay Rule)

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History Licenses Refresh Save Go To

Person Job Assignment

Timekeeper

Worker Type: Limited

Standard Hours

Daily: 0.00 Weekly: 0.00 Per Pay Period: 0.00

		Pay Rule	Effective Date *
+	x	PX PostDoc MO-S HOL0	12/01/2016
+	x		

# Using Effective Dates

Updating Pay Rule or Accrual Profile

More specifically

- imports for first time
- change in employment status



# Key Points

- Kronos effective dates do not always need to align with UCPath effective dates.
- Effective dates in Kronos should **never be within a signed off pay period.**
- If the desired effective date falls within a:
  - Signed off period, use **last sign off + 1**
  - Current pay period, use the **desired effective date**
  - Future pay period, **wait until the date falls within current pay period** and then use the desired effective date

# Last Signed Off Date + 1

The end date of the last signed off pay period

Last signed-off found People Editor > Job Assignment tab > Primary Account

TEST, NON-EXEMPT

◀ 1 of 1 ▶ 522345678

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History

Licenses

Refresh

Save

Go 1

Person

Job Assignment

▼ Primary Account

		Primary Job	Primary Labor Account *	Effective Date *
+	×		-/0/0/0/1/0/0	1/14/2018
+	×			

Signed Off: 2/06/2021

# Last Signed Off Date + 1 Example

An MO employee's effective date is 1/1/2021 in UCPath, and the employee needs an a new Pay Rule.

January timecard is signed off.

What is their effective date?

**2/1/2021**

# Effective Dates

Wrong date:

- calculation issues during historical corrections
- partial sign off
- overall payroll processing complications

Correct date:

- fewer errors - easier and smoother payroll processing

# Training Objectives

Timekeepers and Payroll Managers should understand:

- ✓ When to use the correct effective date
  - How effective dates affect payroll
  - How effective dates affect accruals and accrual imports

# Pay Rule Cases

We'll be going over three Pay Rule cases:

- Historical Corrections & Recalculation

- Partial Sign Off

- Future Dated Pay Rules

# Case 1: Historical Correction & Recalculation of Uploaded Hours

Rachel is a full-time biweekly (BW) employee

- Works in dept BING
- Clocks in from M-F at 8 AM to 5 PM

**Pay Rule:** 99 BW-H HOL8 OT 60



Let's see her timecard

99 BW-H HOL8 OT 60

99 non-represented

BW-H biweekly hourly

HOL8 8 holiday hours

OT overtime is paid out

60 **automatic lunch deduction**



		Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily	Period
+	✕	Sun 1/10												
+	✕	Mon 1/11			8:00AM		5:00PM					8.00	8.00	8.00
+	✕	Tue 1/12			8:00AM		5:00PM					8.00	8.00	16.00
+	✕	Wed 1/13			8:00AM		5:00PM					8.00	8.00	24.00
+	✕	Thu 1/14			8:00AM		5:00PM					8.00	8.00	32.00
+	✕	Fri 1/15			8:00AM		5:00PM					8.00	8.00	40.00
+	✕	Sat 1/16												40.00
+	✕	Sun 1/17												40.00
+	✕	Mon 1/18	Martin Luther King Day	8.00									8.00	48.00
+	✕	Tue 1/19												48.00
+	✕	Wed 1/20												48.00
+	✕	Thu 1/21												48.00
+	✕	Fri 1/22												48.00
+	✕	Sat 1/23												48.00

Rachel clocks in at 8 AM and clocks out at 5 PM resulting in 8 hours of work due to the 60 minute deduction in her Pay Rule

# Case 1: Rachel gets a new job!

hooray!

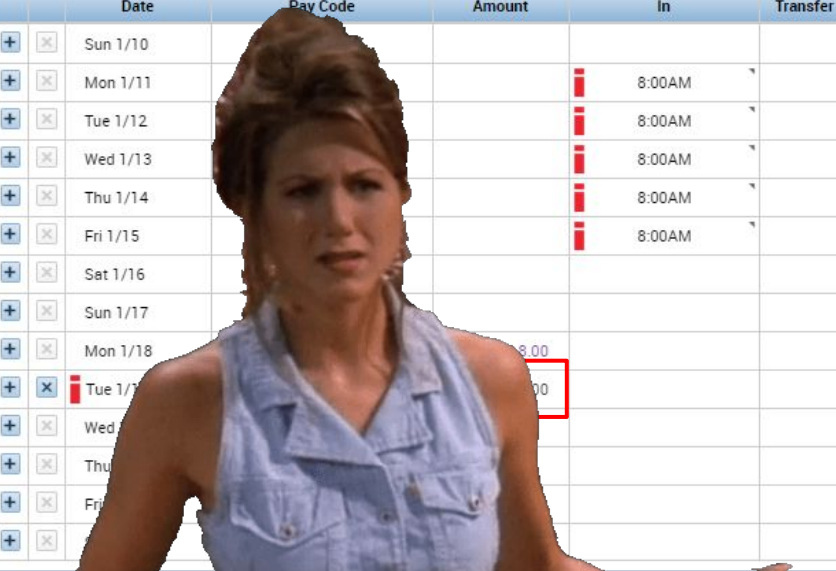


Rachel transfers from BING to ROSS effective 1/19/2021:

- Remains as a non-rep, biweekly employee
- Now enters Hours Worked

Let's see her timecard

# Case 1: Rachel's Timecard with dept ROSS



		Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily	Period
+	✕	Sun 1/10												
+	✕	Mon 1/11			8:00AM		5:00PM					8.00	8.00	8.00
+	✕	Tue 1/12			8:00AM		5:00PM					8.00	8.00	16.00
+	✕	Wed 1/13			8:00AM		5:00PM					8.00	8.00	24.00
+	✕	Thu 1/14			8:00AM		5:00PM					8.00	8.00	32.00
+	✕	Fri 1/15			8:00AM		5:00PM					8.00	8.00	40.00
+	✕	Sat 1/16												40.00
+	✕	Sun 1/17												40.00
+	✕	Mon 1/18		8.00									8.00	48.00
+	✕	Tue 1/19		7.00									7.00	55.00
+	✕	Wed 1/20												55.00
+	✕	Thu 1/21												55.00
+	✕	Fri 1/22												55.00
+	✕	Sat 1/23												55.00

When entering 8 Hours Worked, Rachel notices her daily amount is only 7.

# Case 1: Rachel's Timecard with dept ROSS (cont.)

		Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily	Period
		Sun 1/10												
		Mon 1/11			8:00AM		5:00PM					8.00	8.00	8.00
		Tue 1/12			8:00AM		5:00PM					8.00	8.00	16.00
		Wed 1/13			8:00AM		5:00PM					8.00	8.00	24.00
		Thu 1/14			8:00AM		5:00PM					8.00	8.00	32.00
		Fri 1/15			8:00AM		5:00PM					8.00	8.00	40.00
		Sat 1/16												40.00
		Sun 1/17												40.00
		Mon 1/18	Martin Luther King Day	8.00									8.00	48.00
		Tue 1/19	Hours Worked	9.00									8.00	56.00
		Wed 1/20	Hours Worked	9.00									8.00	64.00
		Thu 1/21	Vacation	8.00									8.00	72.00
		Fri 1/22	Hours Worked	9.00									8.00	80.00
		Sat 1/23												80.00

Rachel's Pay Rule isn't updated, so Rachel enters 9 Hrs Wk and 8 hours of vacation on 1/21 to total 40 hrs/wk.

Her timecard is subsequently signed off and uploaded.

# Case 1: Rachel's New Pay Rule

Dept ROSS's Payroll Manager (PM) updates Rachel's Pay Rule, but with an effective date **within a signed off pay period**.

GREEN, RACHEL

1 of 1

522345678

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History

Licenses

Refresh

Save

Go T

Person

Job Assignment

Timekeeper

Worker Type: <None>

Standard Hours

Daily: 0.00

Weekly: 0.00

Per Pay Period: 0.00

		Pay Rule	Effective Date *
+	×	99 BW-H HOL8 OT	1/19/2021
+	×		

# Case 1: Rachel Changes Vacation to Sick

Historical Correction to change Vacation to Sick on 1/21.

In a historical correction (HC), the Kronos System Administrator opens the timecard in the requested pay period for editing.

So when a HC is done for Rachel, this **triggers her timecard to be recalculated.**

# Case 1: Timecard Recalculation

		Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily	Period
+	✕	Sun 1/10												
+	✕	Mon 1/11			8:00AM		5:00PM					8.00	8.00	8.00
+	✕	Tue 1/12			8:00AM		5:00PM					8.00	8.00	16.00
+	✕	Wed 1/13			8:00AM		5:00PM					8.00	8.00	24.00
+	✕	Thu 1/14			8:00AM		5:00PM					8.00	8.00	32.00
+	✕	Fri 1/15			8:00AM		5:00PM					8.00	8.00	40.00
+	✕	Sat 1/16												40.00
+	✕	Sun 1/17												40.00
+	✕	Mon 1/18	Martin Luther King Day	8.00									8.00	48.00
+	✕	Tue 1/19	Hours Worked	9.00									9.00	57.00
+	✕	Wed 1/20	Hours Worked	9.00									9.00	66.00
+	✕	Thu 1/21	Sick	8.00									8.00	74.00
+	✕	Fri 1/22	Hours Worked	9.00									9.00	83.00
+	✕	Sat 1/23												83.00

From 80 hours to 83 hours.

The next upload picks up the sick and 3 additional hours from the HC.

# Case 1: Historical Correction & Recalculation of Uploaded Hours

If a Pay Rule effective date is set **within a signed-off pay period**, the employee's timecard may incorrectly recalculate in a HC.

GREEN, RACHEL

1 of 1

522345678

Loaded: 3:27PM

History

Licenses

Refresh

Save

Go To

Person

Job Assignment

Job Assignment Summary

Primary Account

Primary Labor Account *		Effective Date *
<div>+</div>	<div>×</div>	-/0/0/0/1/0/0
<div>+</div>	<div>×</div>	1/14/2018

Signed Off: 1/23/2021

Rachel's effective date should have been 1/24/2021.



## Case 2: Partial Sign-Off

Monica is going from BW to MO effective 1/1 in UCPath.

Her timecard is signed off thru BW PPE 1/23.

PM updates the to Pay Rule MO-S effective 1/1, **within a signed off pay period.**

Let's see her timecard



# Case 2: Partial Sign-Off

Error NGUI-00263 Timecard is already signed off.

GELLER, MONICA

1 of 1

534567890

Loaded: 4:10 PM

Previous Pay Period

1 Employee(s) Selected

View

Approve Timecard

Sign Off

Accruals Actions

Print Timecard

Refresh

Calculate Totals

Save

Go To

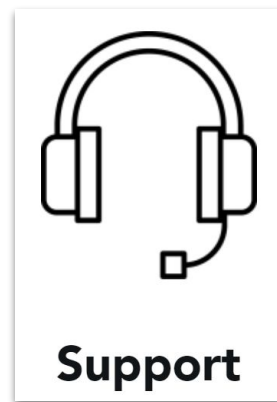
		Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Schedule	Shift	Daily	Period
+	x	Wed 1/20												16.00
+	x	Thu 1/21												16.00
+	x	Fri 1/22												16.00
+	x	Sat 1/23												16.00
+	x	Sun 1/24												16.00
+	x	Mon 1/25												16.00
+	x	Tue 1/26												16.00
+	x	Wed 1/27												16.00
+	x	Thu 1/28												16.00
+	x	Fri 1/29												16.00
+	x	Sat 1/30												16.00
+	x	Sun 1/31												16.00

Monica's PM is now unable to sign off her timecard.

## Case 2: Partial Sign-Off

If a Pay Rule effective date is set **within a signed-off pay period**, this can cause partial sign off issues.

Best to submit a ticket for cycle changes.



## Case 3: Future Dated Pay Rules

Joey is a postdoc employee with a PostDoc BW-H Pay Rule.

Starting 4/1, Joey will be moving from BW to MO.



# Case 3: Future Dated Pay Rules

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History Licenses Refresh Save Go To

Person Job Assignment

Timekeeper

Worker Type: Limited

Standard Hours

Daily: 0.00 Weekly: 0.00 Per Pay Period: 0.00

		Pay Rule	Effective Date *
+	x	PX PostDoc BW-H H0L0	12/01/2016
+	x	PX PostDoc MO-S H0L0	4/01/2021
+	x		

PM sets the new Pay Rule's effective date of 4/1, two months from now. This is considered to be future dated\*.

\*Future dated effective dates are dates set after the Current Pay Period

## Case 3: Future Dated Pay Rules

Next BW upload occurs.

But Joey reports that he didn't receive that paycheck.

What happened?

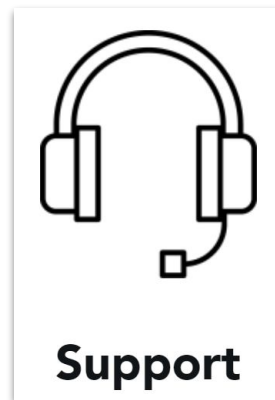
Kronos doesn't recognize the BW Pay Rule because of the future dated MO Pay Rule.



## Case 3: Future Dated Pay Rules

If a Pay Rule effective date is set in a **future date**, this can prevent the employee from uploading and impacting their pay.

Best to submit a ticket for cycle changes.



# Training Objectives

Timekeepers and Payroll Managers should understand:

- ✓ When to use the correct effective date
- ✓ How effective dates affect payroll
  - How effective dates affect accruals and accrual imports



# Accrual Profile Case

We'll be going over one Accrual Profile case

# Case 1: Accruals Aren't Appearing

It's important that an employee's configuration is set up properly.

UCPath is the system of record.

"No Accruals" profile can delay the employee from seeing and entering leave.



sick



vacation



pto

# Case 1: Accruals Aren't Appearing

Incorrect Accrual Profile effective date may also delay accrual use.

Incorrect date = accrual import mismatch

As a result, it's important that the employee is assigned an Accrual Profile with a start date of the last sign off date plus one.



sick



vacation



pto

# Training Objectives

Timekeepers and Payroll Managers should understand:

- ✓ When to use the correct effective date
- ✓ How effective dates affect payroll
- ✓ How effective dates affect accruals and accrual imports

## Summary:

- Effective dates in Kronos should not be within a signed off pay period.
- Effective dates in Kronos do not need to align with effective dates in UCPath.
- Entering in effective dates within a signed off pay period or future dated effective dates can cause issues in employees configuration, timecards, miscalculation, and more.

**THANK YOU!**

**Questions?**

# Q&A

**Q:** How many participants were there?

**A:** 79 attendees

**Q:** If accruals are calculated in UCPath, why do we need to update accrual profiles in Kronos?

**A:** Kronos Accrual Profiles set the reminder threshold for when an employee is nearing their accrual cap. Although UCPath is the system of record, but they do not generate email reminders which is a helpful tool for employees as they reach to their accrual max.

# Q&A

**Q:** I have GSRs and TAs (MO) that often also hold a Reader position for a quarter. They may or may not get hired into the Reader (BW) position in a future quarter. Can I inactivate a Reader position without affecting the GSR or TA employment? Is it okay to leave the employee showing in Kronos BW but not currently active?

**A:** GSR and TAs don't use Kronos or record time to any timecards. With that in mind, if an employee has a readership and then their position ends, you can remove their licenses in Kronos once final pay has been settled. If they ever get another position that records time in Kronos, they'll automatically re-populate into Kronos.

**Q:** Are Payroll Managers notified regarding service milestones?

**A:** PMs are not notified regarding service milestones (as far as the Timekeeping team is aware). This might be a question you want to ask HR, though.



# Q&A

**Q:** Who adjusts Path when a leave accrual milestone has been reached?

**A:** UCPath adjusts the earning rate automatically, since it's aware of employees' service length. You can see employees' earning rate reflected in the Review Absence Balance page.