Mini Tune-Up: Final Timecards & Removing Licenses

Electronic Timekeeping

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Mini Tune-Up Session Info

Objective

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

Format

- 1 hour session via Zoom Webinar
- Questions can be submitted throughout presentation
- Recording, Presentation, and Q&A will be posted on website

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Agenda

- Training Objectives (Elliott Lee)

- Final Timecards & Removing Licenses (Elliott Lee)
  - Intro to licenses and what they do
  - Case #1: "Boomerang" Employees
  - Comparing and picking between on- and off-cycle
  - Case #2: Off-cycle pay through BFS
  - Case #3: On-cycle pay through Kronos

- Prepared Q&A
- Live Q&A

Training Objectives

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

- When and how to remove employee licenses in Kronos
- When and how to remove manager licenses in Kronos
- Why previously-terminated employees may temporarily appear on your roster
- How to handle terminating employees in Kronos
- How to process an employee's final Kronos timecard

Intro Poll

Poll:

I am comfortable with processing final timecards and removing licenses in Kronos.

- Agree
- Neither agree nor disagree
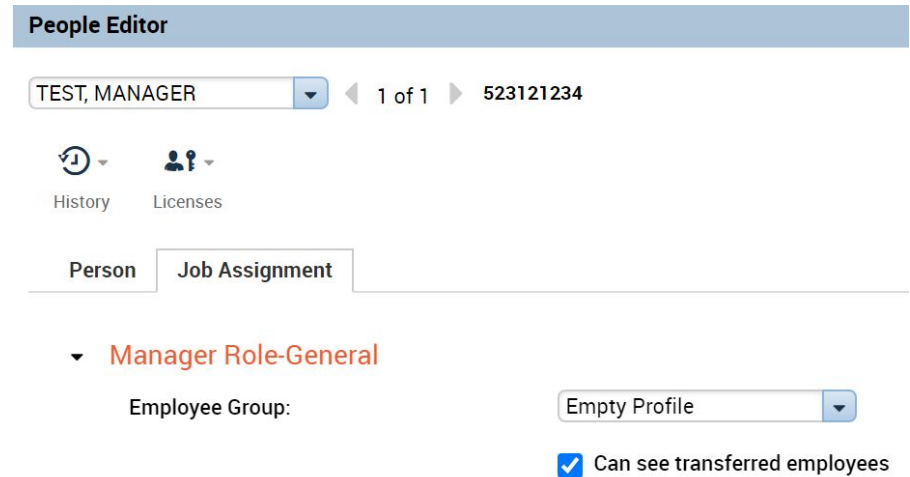- Disagree

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What are licenses, and what do they do?

- Licenses give employees access to Kronos
  - Employees who import into Kronos have two active licenses: **Workforce Timekeeper** and **Workforce Employee**
  - Licenses are per-employee, *not* per-position!

- Managers need an additional license: **Workforce Manager**

- Mistimed removal can cause issues
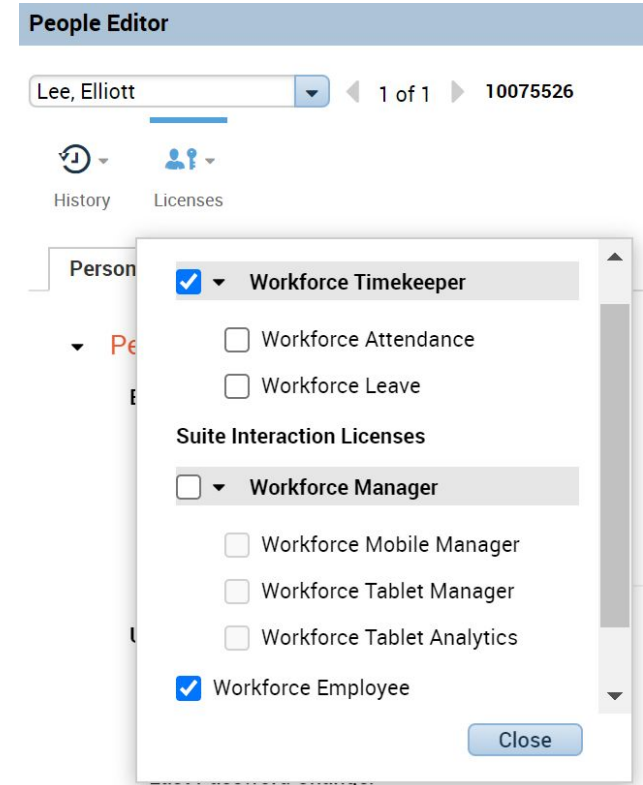
Additional step when removing managers' licenses

- People Editor -> Job Assignment tab -> Manager Role-General, Employee Group should be set to **Empty Profile** and saved before removing a manager's licenses

- This ensures managers cannot be rehired and import with their old visibility!

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How do I remove or verify licenses?

- People Editor -> click Licenses icon, uncheck licenses and save

- If you want to confirm that licenses are turned *on*: under Person Summary, check **Employment Status** and **User Account Status**

Kronos License Maintenance

- Every month, the Kronos Admins automatically remove Kronos licenses based on this UCPath criteria:
  - No active jobs
  - No future-dated job actions
  - Current job action is RET or TER
  - Effective date of the current job action is older than the current month

- Departments are notified of these removals by email
- Admins can bulk-remove licenses via a ticket
  - Must be 20+ employees, and include a spreadsheet with names & IDs

"Boomerang" Employees

What's the issue?	When does it occur?	Why does it happen?	Solution for old departments?
Previous employees reappearing in old department rosters with a new, unrelated position from another department	Employee is rehired by a new department after a break in service	Kronos does not allow gaps in effective dates for Primary Labor Accounts	Look at next pay period; they'll drop out of roster

No ticket or manual intervention needed

Don't approve or sign off on boomerang employees! |

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"Boomerang" Employees: Real-Life Example

Primary Account History

Primary Job	Primary Labor Account	Start Date	End Date
	447636/57022/KK52/...	4/15/2018	4/30/2018
	447636/57022/KK52/...	5/01/2018	6/30/2018
	447636/57022/KK52/...	7/01/2018	7/31/2018
	447636/57022/KK52/...	8/01/2018	8/31/2018
	NRII/0/0/0/0/0/40033...	9/01/2018	3/14/2021
	PSYC/2/0/0/UCSB008...	3/15/2021	Forever

Employee *actually* left NRII in **November 2019**, and began working for PSYC on March 15, 2021

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Case #1: Jess, the "Boomerang" Employee

- Staff member Jess works for department **LUKE**

- Jess leaves UCSB in February 2021 to write a moody novel

- Jess returns to UCSB on 6/14/21 to work for department **KIRK**

- On 6/14, the **LUKE** payroll manager notices Jess is on their Current Pay Period roster with a **KIRK** position!
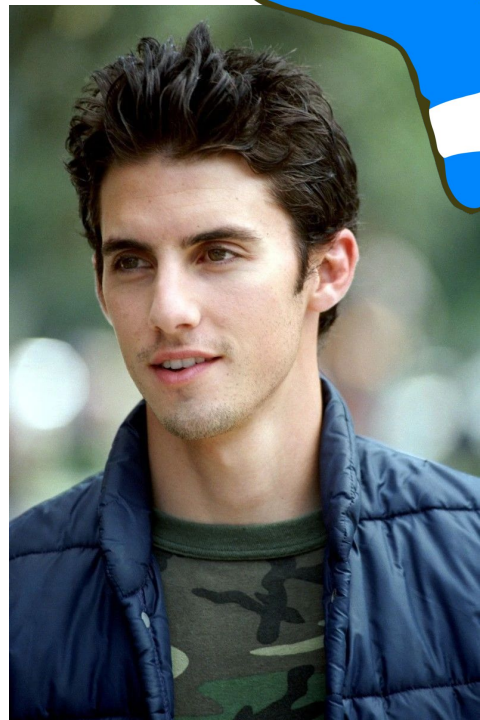
Case #1: Jess, the "Boomerang" Employee

Poll:

The **LUKE** payroll manager notices Jess has reappeared in their roster with a new **KIRK** position. What should the **LUKE** payroll manager do?

A. Submit a ticket
B. Remove Jess's licenses
C. Do nothing

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Solution: do nothing!

- Jess is only *temporarily* appearing in the **LUKE** roster. He will naturally drop off in the following pay period
  - The **LUKE** payroll manager can verify this by switching their Kronos view to the following pay period

- The **KIRK** payroll manager can see Jess without any problems in Current Pay Period, and all future pay period views

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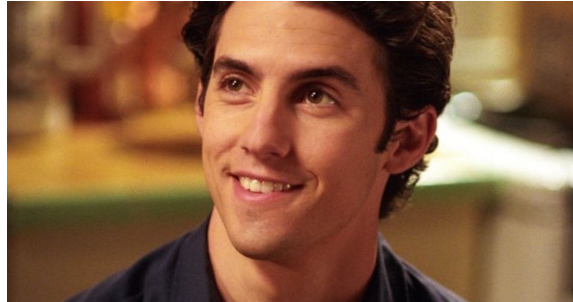
Final Timecard Definition

- Final timecard: the last timecard in Kronos for an employee who has **no other active positions that record time.**

- Final timecard process and license removal timing depends on **how the employee's final paycheck is processed!**
  - Processed off-cycle through BFS Final Pay Request ticket

    or…
  - Processed on-cycle through Kronos payroll upload

On-cycle (Kronos)

Off-cycle (BFS)

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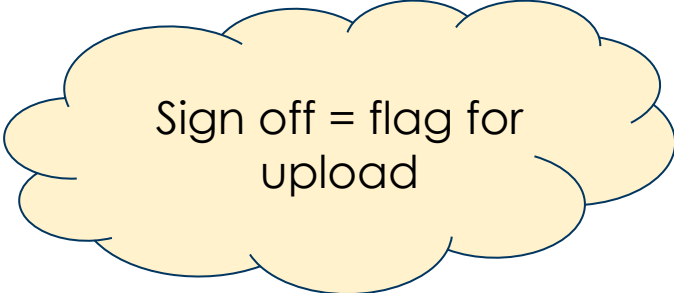
On- or off-cycle? Picking a BUUNK bed

- **B**argaining **U**nit: what does the employee's contract say?
  - E.g.: a union contract requires final check within defined time frame

- **U**pload: do I need their final timecard to upload?
  - If yes: sign off final pay period before upload deadline, remove licenses after paycheck is confirmed.
    - Employees need active licenses *and* timecard sign off in order to upload
  - If no: do not sign off final pay period, remove licenses on/after term date

- **N**eed **K**ronos: when does the employee no longer need to be in Kronos?
  - If they have other active positions that record time in Kronos, don't remove their licenses!

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Comparing off-cycle vs. on-cycle

Off-cycle (BFS)

- Do **not** want final timecard uploaded, so do **not** sign off

- Remove licenses on day of or after termination date

- Accruals and final wages paid out through BFS

Sign off = flag for upload

On-cycle (Kronos)

- Final timecard signed off and included in the upload

- Remove licenses after upload and paycheck is confirmed

- Comp Time paid out on timecard, Vacation paid out by BFS

- Final wages paid on-cycle without BFS assistance

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Case #2: Lane & BUUNK

- **B**argaining **U**nit: Lane's contract says she needs to receive final pay within 10 calendar days of resignation
    - Must go **off-cycle** through BFS

- **U**pload: final timecard does not need to upload if BFS is handling final pay and accrual payout. **No need to sign off**

- **N**eed **K**ronos?: does not need Kronos after termination date, can remove licenses then

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Case #2: Lane & off-cycle final pay through BFS

- Lane is a represented, BW-H manager in Kronos. She is leaving UCSB to go on tour with her band

- Her termination is complete in UCPath, and her payroll manager already submitted a Final Pay Request for Lane through BFS

- Lane's payroll manager updates Lane's Employee Group to "Empty Profile"

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Case #2: Lane & off-cycle final pay through BFS

Poll:

Lane's termination is complete in UCPath, and she is being paid off-cycle via BFS Final Pay. Lane's Employee Group in Kronos has already been updated to "Empty Profile." What should Lane's payroll manager do next?

A. Do not sign off on her timecard, remove licenses on/after termination date

B. Sign off on her timecard, leave licenses on until after the upload

C. Do nothing

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Solution: *do not* sign off her timecard, then remove licenses on or after termination date

- Signing off on her timecard flags it for the upload 👎
  - *Not* signing off on the timecard excludes it from the upload 👍👍👍

- Removing Lane's licenses also excludes her timecard from the upload 👍👍👍
  - Since her termination is complete, Lane doesn't need to use or appear in Kronos anymore

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Case #3: Lorelai & BUUNK

- **B**argaining **U**nit: Lorelai's policy-covered, and there's no particular reason to do final pay off-cycle through BFS
  - Will go **on-cycle** through Kronos

- **U**pload: final timecard needs to be uploaded if going on-cycle through Kronos. **Timecard needs to be signed off** before upload

- **N**eed **K**ronos?: needs to stay active in Kronos until final timecard uploads

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Case #3: Lorelai & on-cycle Kronos processing

- Lorelai is a policy-covered, MO-S employee who is leaving UCSB on 6/17 to open her own business, the Dragonfly Inn. Her termination is approved in UCPath

- Lorelai uses 40 hours of Vacation from 6/7 - 6/11 to meet with potential inn vendors

- Lorelai's payroll manager reaches out to BFS to pay out all of her Vacation earnings, minus those 40 hours taken

How should Lorelai's payroll manager time the sign off and license removal?

PM should: sign off her June timecard before the 7/23 MO upload, remove licenses after upload

- June timecard needs to be signed off for June leave taken to upload on 7/23

- 7/1 paycheck will contain June wages and Vacation payout

- PM can remove licenses after 7/23 MO upload

Alternate universe: Lorelai didn't use any leave during June

- If Lorelai *hadn't* recorded June leave: PM signs off on May timecard before 6/22 MO upload
- PM removes licenses after confirming 7/1 paycheck in UCPath, around 6/29
  - 7/1 paychecks are available to view in UCPath on 6/29

- PM can remove licenses sooner since June has no leave taken to upload

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When processing on-cycle through Kronos...

- Employee should enter hours worked and leave taken normally
  - They should enter time before they terminate!

- PM/TKs should enter CT Payout (if applicable) on the last day worked of the pay period
  - If a non-quarter-hour increment of CT needs to be paid out, submit a Timekeeping ticket

- Vacation Payout, if applicable, still goes to BFS
- Sign off on the timecard before the upload deadline
- Remove licenses after termination is complete and final paycheck is confirmed in UCPath

Summary, pt. 1

- Sign off/license removal process and timing depends on how final pay is being handled.

- Use **BUUNK** to help determine how to process an employee's licenses and final timecard, whether you're going on- or off-cycle.

- Update managers' Employee Group to "Empty Profile" and save before removing their Kronos licenses.

Empty Profile

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Summary, pt. 2

- If you see an old employee pop up in your roster with a new department's position, the employee will naturally drop out of view in the next pay period. (Jess)

- When doing final pay off-cycle through BFS, do not sign off the final Kronos timecard, and remove licenses on or after termination. (Lane)

- When going on-cycle through Kronos, sign off the final Kronos timecard before the upload, and only remove licenses after the final paycheck is confirmed. (Lorelai)

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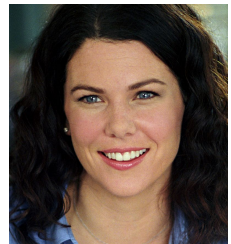
Resources

- [Terminated Employees & Payroll Upload](#) KB article: outlines concepts described in this presentation
- [UCPath Production Processing Schedule](#): outlines when paychecks will appear for a given pay period
- [Timekeeping Calendar](#): shows when each pay period's upload is scheduled
- [BFS ServiceNow portal](#): submit Final Pay Request tickets here. (Vacation Payout is also handled through the Final Pay Request ticket)

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Intro Poll (post-MTU edition)

Poll (round 2)

I am comfortable with processing final timecards and removing licenses in Kronos.

- Agree
- Neither agree nor disagree
- Disagree

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Pre-Submitted Q&A: License Removal Timing

Q: When do you remove a license after termination? Is it different for BW vs. MO? Should we wait to remove licenses so that MO-S leave taken can upload?

A: The biggest differentiating factor for timing of license removal is whether final pay is *off-cycle through BFS*, or if they're being processed *on-cycle through Kronos.*

BW vs. MO only changes the timeline as it relates to the upload, since the upload schedule is different for each pay cycle.

There are situations where, if an employee is going on-cycle through Kronos, you would want to wait to remove licenses so leave taken can upload (Lorelai).

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Pre-Submitted Q&A: Uploading when terminated

Q: Does information upload from Kronos to UCPath when an employee no longer has any active positions in UCPath?

A: Yes, if they have active Kronos licenses, their timecard is signed off, and if the employee is active in UCPath on the dates that timecard data is uploading for.

For example: if a BW-H employee's last day is Thursday, 6/10:
- Hours from 5/30 - 6/10 will upload on Tuesday, 6/15
- Hours worked on Friday, 6/11 will error, because UCPath knows the employee terminated on Friday, 6/11

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Pre-Submitted Q&A: Terminal pay codes

Q: Do we ever need to use the "Terminal" pay codes in Kronos?

A: Nope! "Terminal" pay codes (and other similar pay codes) been removed in Kronos, as of this month.

The only relevant, conceptually-similar pay code is the **CT Payout** pay code, which pays out an employee's accrued comp time.

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THANK YOU!

Questions?

Live Q&A: Retiring employees

Q: For those retiring on 6/29/21, what is the best way to do final pay?

A: In general, our guidance here for terminated employees should also apply to retiring employees. For more specific cases, please submit a Timekeeping ticket.

Live Q&A: Forgot to update manager's Employee Group

Q: I removed the license for a manager without updating the Employee Group to "Empty Profile." Should I go back in and correct this?

A: If the Employee Group wasn't updated to "Empty Profile" at the time of a manager's termination, there's no need to go back and clear it out now. If they're rehired, that manager can still have their Employee Group updated once they import back into Kronos.

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Live Q&A: Cycle changes

Q: For those BW employees transferring to MO position, do we need to wait for MO vacation upload?

A: Timing advice for cycle changes is highly specific and differs depending on an employee's specific situation. Please submit a Timekeeping ticket, and we can give more tailored advice for a given employee's cycle change.

Live Q&A: Timing of license maintenance

Q: Which day of the month is license maintenance performed by the administrators?

A: The targeted schedule is on or near the last day of the month. It must follow the last BW and MO upload.

For example, in June 2021, the last BW upload is on June 29, so the process is scheduled for June 30.

Live Q&A: Transferring to another UC

Q: Do all UC campuses use Kronos? Should we remove licenses when an employee transfers to another UC?

A: Not all UC campuses use Kronos.

If an employee is moving to another UC campus, they would still be considered a terminating employee. As such, this presentation's guidance would still apply as if they were an employee who was leaving the UC system entirely.

The Kronos environment that we use is specific to UCSB, so if an employee transferred to another Kronos-using UC campus, that would not change our guidance.

Live Q&A: Benefits premium deductions

Q: Have you ever seen final pay include benefits premium deductions if the employee doesn't want coverage for the total time that they've already paid into with their final paycheck?

A: HR and/or BFS would be able to provide more authoritative answers here. From a Timekeeping perspective, Kronos is unaware of employees' insurance plans, premiums, deductions, etc.

Live Q&A: Student working in another dept

Q: If a student works in a different department, and they're terminating from a position in our department, do we remove their licenses?

A: In this scenario, you would **not** remove their licenses, assuming their employment in the other department needs to report time in Kronos. (Positions like TAships and GSRs do not need Kronos, since they don't record time.)

Slide #6 emphasizes that licenses are **per-person, not per-position**. Licenses should only be considered for removal if an employee will have 0 positions that report time in Kronos.

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