Time Reporting System (TRS)

Supervisor Handbook

Last update: 10/30/24

TRS Support Desk, UCOP Payroll Services

Questions? Email href.com.edu

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TRS OVERVIEW

Welcome to the UCOP Time Reporting System (TRS). TRS is a web-based application developed by the University of California, Irvine (UCI) in 2010 for campus time entry, tracking, and reporting. The version of TRS that is retiring with PPS was renamed to Legacy TRS. The new version referred to as TRS UCPath or UCPath TRS, is the University of California's comprehensive payroll, benefits, human resources and academic personnel system. This system brings efficiency with an online interface that allows employees to enter time online, supervisors to approve/edit/return timesheets, and department time administrators (DTAs) to submit timesheets electronically to the campus payroll system. New employee appointment is automatically loaded into TRS, using information from UCPath and from the university identity management system.

This handbook provides an overview of TRS, specifically for supervisors (primary or backup). General instructions on navigating TRS and utilizing its many features are included.

Primary and Backup Supervisors

In TRS, there is a primary supervisor, a backup, and an optional supervisor.

Primary Supervisor

The primary supervisor is the individual that is most aware of the employee's work schedule and is generally the one that will review and approve the employee's timesheet.

The **DTA assigned to your department is responsible for the assignment** and maintenance of primary and backup or optional backup supervisor records for each employee in your department.

If you should/should not be listed as the supervisor (primary/backup/optional backup) for a particular employee/group of employees, please contact your DTA for assistance.

The DTA is also responsible for updating the supervisor information for employees that transition from one appointment to another.

Backup and Optional Backup Supervisors

The backup and optional backup supervisors are the individuals that can approve the employee's timesheet in the primary supervisor's absence. Before taking action on any employee timesheet for which you are the backup and optional backup supervisor, you should contact the primary supervisor of that employee first.

Employee

Both primary and backup supervisors must be added in order for the employee to save or submit a timesheet. We generally recommend the backup supervisor be the supervisor of the primary supervisor.

Timesheet Deadlines

It is extremely important that supervisors are aware of the timesheet submission deadlines to ensure that your employees are paid in a timely manner.

Biweekly employees

Timesheets are available on the first day of the pay period and are generally <u>due</u> on the **last working day of the pay period by 5 PM**. System email reminders are sent the day before the timesheet is due.

Example: For the pay period of January 20-February 2, the timesheet is available on January 20.

Monthly employees

Timesheets are available on the first day of the pay period, and <u>due</u> on the **6**th **calendar day of the following month**. System email reminders are sent out the day the timesheet is due.

The TRS/UCPath Deadlines are managed by the Payroll Division and are posted online in https://www.ucop.edu/local-human-resources/op-life/payroll/time-reporting.html.

Policy and Calculations

TRS uses the UC Time and Attendance Policy to compute total hours for the day to the nearest quarter of an hour (e.g., 8:10 time is rounded up to 8:15). Applicable overtime, based on employee classification, and number of hours worked (daily, weekly), are automatically calculated, and alternate work schedules (4/40 and 9/80) accounted for.

Email Notifications

The Time Reporting System automatically generates emails to assist you in meeting deadlines and to alert you to changes that may be needed for a timesheet. These emails come from the **UCPath TRS** - **UCOP DoNotReply@uctrs.it.ucla.edu** email address and are sent to your UCOP e-mail address. If you do not receive the system-generated emails, you may want to check your spam/junk folders to ensure that they are not being delivered there.

Logging Into TRS

- To Access the TRS system, log into <u>Time Reporting System (TRS)</u> via Single Sign-On (SSO).
- 2- The TRS main page will be displayed with access options.
- 3- Select the Supervisor option.

			G SYSTEM
l l	Employee	Supervisor	Administrator (DTA)
		Experience Center & 9 Support & Training University 5.15	

The **Manage My Staff** tab will be displayed, along with the Manage My Time tab. This guide will focus on the Manage My Staff tab. See the Manage My Staff section for details. For the Manage My Time tab, see the TRS UCPath Employee Handbook.

NOTE: All TRS Users must have an active UCPath employee ID and password to access TRS.

Manage My Staff

The Manage My Staff tab has five sub-tabs:

- 1. **Approve as Primary** Used by Primary Supervisors to review/approve timesheets.
- Approve as Backup Used by Backup Supervisors and Optional Backup Supervisors to review/approve timesheets. This section mirrors the functions of the Approve as Primary section.
- 3. Manage Timesheets Enables the user to view timesheets based on selected criteria. It is also used for creating a timesheet on behalf of the employee.

Manage My Time 🝷	Manage My Staff -
	Approve as Primary Approve as Backup Search Timesheet Create Timesheet
	Supervisor Notification Pay Status Hour Report

- 4. **Set up Notification** Used by Primary Supervisors to Opt-in or Opt-out of timesheet submitted notifications from employees.
- 5. **Generate Reports** Enables the user to view timesheets based on selected criteria. It is also used for creating a timesheet on behalf of the employee.

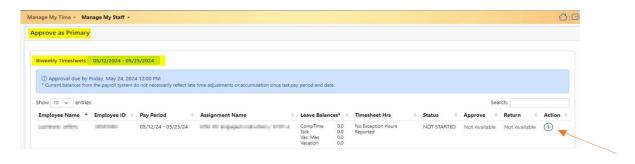
Approve as Primary or Backup

ROSTER SECTIONS

Supervisors should always check both tabs to view timesheet data. Once on the Primary or Backup subtab, a **roster** of each active employee assigned to the supervisor is displayed.

The roster displays four sections:

- (1) Past Pending Monthly Timesheets (not included in screen shot below)
- (2) Current Monthly Timesheets (not included in screen shot below)
- (3) Past Pending Biweekly Timesheets (not included in screen shot below)
- (4) Current Biweekly Timesheets



Note: If employee did not create the timesheet, as supervisor, you may select + under Actions for specific employee and create the timesheet on behalf of the employee.

Search - To Search for a name, type in name, and TRS will display your options.

Timesheet submission:

Timesheets for monthly-paid employees will only be submitted for processing once they have been approved. If a biweekly timesheet has been created and is not approved by the payroll deadline, the timesheet will be auto approved and submitted by the system. However, your timely attention in reviewing and approving your employees'' timesheets is critical in processing accurate pay and reducing possible corrections.

If the timesheet has **NOT** been created by an employee on active assignment during the pay period and you receive an email, then you should create the timesheet and submit on behalf of the employee.

Column Headings

(1) Action - An optional avenue of approving and submitting a timesheet to UCPath. Two icons are displayed here:

- View Timesheet icon: Select this icon to view an employee timesheet.
- View Workflow icon: Select this icon to view the workflow of a timesheet.
- (2) **Employee Name** Names are displayed by last name, first name. This is a sortable column. Use the caret to sort the results.
- (3) Pay Period Timesheet dates are displayed by pay periods. This is a sortable column.
- (4) Assignment Name Unique appointment information. This is a sortable column.
- (5) **Primary Supervisor** The name of that employee's supervisor.
- (6) **Timesheet Hrs.** Displays hours reported for that timesheet.
- (7) **Timesheet Status** Displays the current status of the timesheet. Please refer to the *Status Codes* in the next section of this handbook.
- (8) **Approve** An optional avenue of approving and submitting a timesheet to UCPath.
- (9) **Return** This function returns a timesheet back to an employee. Once an employee submits his/her timesheet to the supervisor, the employee cannot make any changes/updates to the timesheet unless the supervisor returns the timesheet or the employee recalls the timesheet.

Timesheet Status Codes

Only timesheets for the current monthly and biweekly pay periods are displayed on the roster.

The supervisor can use the roster to review if timesheets have been submitted to the supervisor, the department time administrator (DTA), or if no action (NONE) has been taken by the employee.

Once hours have been entered and submitted, TRS automatically tracks the status of the timesheet.

Here are some of the most common codes:

Timesheet Status Code	
Saved	Hours have been entered and timesheet saved
Submitted to Supervisor	Timesheet has been submitted to the supervisor for approval
Recalled by Employee	Request submitted that TRS returns a submitted timesheet to the employee
Returned by Supervisor	Supervisor has returned the timesheet back to the employee for edits
Submitted to DTA	Supervisor has approved the timesheet and submitted to DTA
Submitted to UCPath	DTA has reviewed the timesheet and submitted it to UCPath for processing
Batch Locked	Timesheet is locked while the system is processing it
Completed	TRS processed the timesheet successfully without errors
None	Timesheet has not been opened, saved or submitted

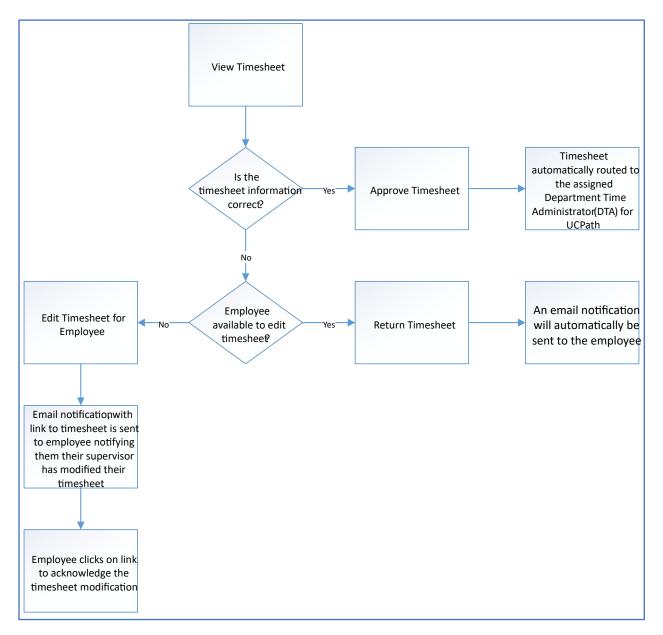
TRS Icons

TRS icons are displayed across TRS tabs and can be used to navigate the system. The table below summarizes the functionality of each of the icons available in TRS.

lcon	Action / Display	Description
	Edit/Open	Indicates editable sections of a timesheet
	Leave Balances	Marks a section for dedicated calculated leave balances such as accrued vacation and sick leave
	View Timesheet	Use to view the status of a timesheet
7	View Workflow	Use to view the status of a timesheet
	Refresh	Use to refresh a screen
Q	Search	Use to search for a value within a document
Û	Delete	Use to delete an entry
Q	Recall Timesheet	Use to recall a timesheet needing edits
	Create Past Pay Period Timesheet	Use to create a timesheet for a past pay period
9	Timesheet Modification	Displayed when a timesheet has been edited by the supervisor on behalf of the employee
0	Acknowledge	For employee to acknowledge a change after supervisor adjusts timesheet
0	Reminder	Displayed as a reminder to submit a timesheet

	Electronic Signature Disclaimer	I (the employee) understand any misstatement or falsification of hours on this time sheet may be cause for disciplinary action up to and including termination.
0	Notice	Displayed in the Timesheet Calendar View to draw attention to an important message
?	Timesheet Work Schedule	Indicates that employee is on an alternative work schedule

Timesheet Workflow



Workflow activities the supervisor will perform include:

- · View employee's current and past timesheets for leave time reported
- Edit an employee's timesheet
- Approve employee's timesheet
- Return employee's timesheet

REVIEWING TIMESHEETS | MONTHLY EMPLOYEES

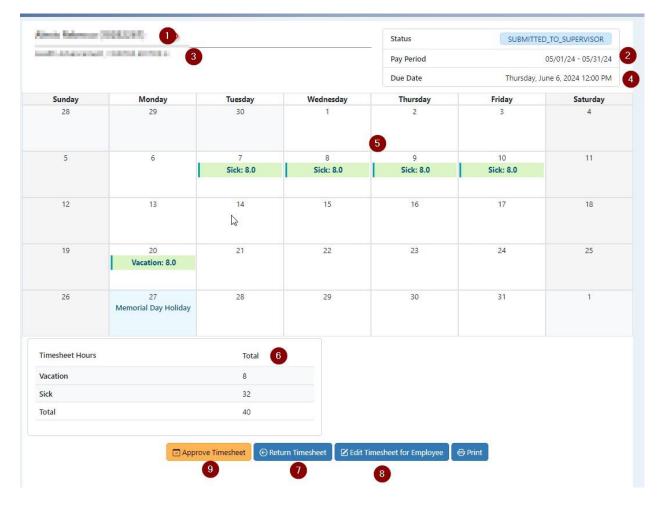
The Monthly Employee

What defines the monthly employee?

- Exempt (not eligible to claim overtime)
- Do not enter overtime.
- Enter only leave time (vacation, sick, etc.)
- Do not enter work hours on timesheet

Understanding the Calendar Interface

Monthly employees use the Timesheet Calendar to add leave hours.



The following is displayed in the Timesheet Calendar:

- (1) Name and ID number.
- (2) Pay Period Begin and end dates.

- (3) Basic Appointment Information Department, Title code name, Job name.
- (4) Due Date Day and Time
- (5) Sick Hours Number of hours entered
- (6) **Timesheet Totals** Displays productive (work hours) and nonproductive hours (e.g., vacation, sick time, etc.). Monthly employees do not report work hours only leave hours.
- (7) **Return Timesheet** Click **Return Timesheet** if changes or corrections must be performed by the employee. An email notification will automatically be sent to the employee if the supervisor returns a timesheet.
- (8) Edit Timesheet for Employee Click Edit Timesheet for Employee only in extreme cases where an employee is not available to make edits to their timesheet. This button allows the supervisor to make edits on behalf of the employee. If this function is used, the employee will receive an email advising them that their supervisor has modified the timesheet; the email will indicate what was changed by the supervisor, along with any comments entered by the supervisor. The email will include a link to the timesheet, which will ask the employee to acknowledge the timesheet modification.
- (9) **Approve Timesheet** Click **Approve Timesheet** if all hours reported by the employee are complete and accurate. The timesheet will automatically route to UCPath. If this button is clicked in error, you will need to contact the DTA and request that they return the timesheet to you.

REVIEWING TIMESHEETS | BIWEEKLY-PAID EMPLOYEES

In accordance with the Federal Fair Labor and Standards Actfederal Fair Labor Standards Act, non-exempt employees are required to enter all work hours and leave time on their timesheets. In other words, every biweekly employee timesheet should include all work time and leave hours.

Note: On holidays, if an employee is eligible for paid holidays off, they will be paid automatically for the holiday. Biweekly employees should not enter any work hours on any university holidays unless they worked on the holiday. TRS will automatically calculate any applicable holiday premium pay.

The Biweekly Employee

What defines the biweekly employee?

- Non-Exempt (eligible to claim overtime).
- Enter overtime.
- Enter all work hours and leave hours.

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Understanding the Calendar Interface

Figure 1: Bi-weekly Employee Calendar

- (1) **Timesheet In/Out Details** A Supervisor can view the details of the work hours (including time in and time out, and lunch in and lunch out) reported by the employee.
- (2) Return Timesheet Use if changes or corrections must be performed by the employee. This option should be used if the biweekly employee failed to enter all of their work or leave hours on their timesheet. An email notification will automatically be sent to the employee if the supervisor returns a timesheet.
- (3) Edit Timesheet for Employee Use only in extreme cases where an employee is not available to make edits to their timesheet.

This button allows the supervisor to make edits on behalf of the employee. If this function is used, the employee will receive an email advising them that their supervisor has modified the timesheet. The email will indicate what was changed by the supervisor, along with any comments entered by the supervisor. The email will include a link to the timesheet, which will ask the employee to acknowledge the timesheet modification.

(4) **Approve Timesheet** - Approve Timesheet if all hours (work and leave) reported by the employee are complete and accurate. The timesheet will automatically route to the assigned department time administrator (DTA) for UCPath processing. If this button is clicked in error, you will need to contact the DTA and request that they return the timesheet to you.

The Alternate Work Schedule

The Time Reporting System uses the alternate work schedule information to calculate any applicable overtime compensation for the biweekly employee.

When viewing a timesheet for a biweekly employee with an *alternate work schedule* (4/40, 9/80, Regular & Temporary), this information will be listed on their timesheet below the calendar, such as *4/40 schedule*: Mon, Tue, Wed, Thu (10 Hrs.)."

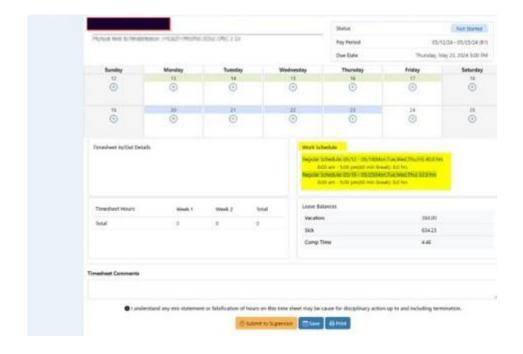
To help the employee identify the work week, the data fields are color coded in TRS.

4/40 Work Schedule

• Week 1 & 2 - Purple

9/80 Work Schedule

- Week (44 hrs) Green
- Week (36 hrs) Blue



Note: If a biweekly employee works an alternate work schedule (4/40, 9/80, Regular & Temporary), and the information is not listed on their timesheet, please contact your department time administrator (DTA) for assistance. If the information is not indicated, the employee may be incorrectly compensated for days worked more than 8 hours.

Shift Differentials

Some biweekly employees may have what is known as a shift differential (SDF). This occurs when an employee works hours that cross over from one shift to another (morning, day or night). When an

employee works hours that constitute an SDF and their assignment is eligible for SDFs, TRS will calculate SDF pay once the supervisor approves the timesheet.

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Once the timesheet has been approved, the SDF hours will show under Earn codes and Hours Summary.

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In this example, the biweekly employee has entered work hours that cross over from one shift to another (day to night). The supervisor will see an **SDF Earn code summary** in the timesheet.

Timesheet Roster Screen

On the timesheet roster screen (accessible from the **Approve as Primary or Approve as Backup** subtabs), there is **workflow** icon⁽²⁾; clicking on this icon will open the **Timesheet Workflow** screen. For a timesheet that has received all the required approvals, and for which data has been successfully submitted in the UCPath System, the screen will include the data shown below:

- Date and time the employee submitted the timesheet
- Date and time the supervisor approved the timesheet
- Date and time the timesheet was submitted to UCPath by the department time administrator (DTA)

Workflow:

2nd Icon under Action will indicate the workflow.

Search Timesheet									
Employee ID	Employee Name	Departme	nt Code	Pay Group Select options		Title Unit Code Select optio	ons	8	
Begin Range	End Range	Tracking S	itatus	Timesheet Identifier		Job Codes			ob Ids
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MANAGING TIMESHEETS

Searching for a Timesheet/Employee

How to Search for a Timesheet/Employee:

- 1. Navigate to the Manage My Staff tab, and select Manage Timesheets
- 2. Enter timesheet or employee related information for the search
- 3. Select Search

Manage My Time -	Manage My Staff -			0.0
	Approve as Primary Approve as Backup Search Time-Peet Create Time-Peet	System) is an user biancity ordere tool designed to shee	niew time tracking and payrial processing for employees, supervisor	s, and departments.
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- (1) Employee ID 8-digit employee ID number
- (2) Employee Name First name, last name or last name, first name
- (3) Begin Range Pay period begin date
- (4) End Range Pay period end date
- (5) Department Code Six-digit home department code
- (6) Tracking Status Select from the available status codes from the drop-down menu
- (7) Timesheet Identifier Job Name (job nickname if assigned)
- (8) Job Ids A piece of TRS data
- (9) Pay Schedule
- (10) Primary Supervisor Your Reports to in UCPath

Creating Timesheet on Behalf of Employee

The Create Timesheet screen allows supervisors to create a timesheet on behalf of an employee in situations where the employee is unable to create/submit a timesheet due to a medical/other situation where the employee is unable to create/submit their own timesheet. A supervisor should not regularly create a timesheet on behalf of an employee.

A supervisor can create a timesheet for an employee if the supervisor is the primary/backup/optional supervisor to the employee's assignment in TRS.

The timesheet **must have** one of the following statuses:

- NONE (never created by the employee)
- SAVED (by the employee)
- RETURNED_BY_SUPERVISOR
- RECALLED_BY_EMPLOYEE

A supervisor cannot create a timesheet that is in one of the following statuses:

- SUBMITTED_TO_SUPERVISOR
- SUBMITTED_TO_DTA
- SUBMITTED_TO_UCPath
- COMPLETED

How to Create a Timesheet on behalf of an employee:

- 1. Navigate to the Manage My Staff tab.
- 2. Go to the Manage Timesheets tab.
- 3. Enter the Employee ID and/or Employee Name.
- 4. Enter the pay period end date of the timesheet you wish to create.
- 5. Click on **Create Timesheet**.

A message appears stating that the timesheet was created.

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If the timesheet already exists, a message stating it will appear here, and the screen will include the data shown below:

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- Date and time the employee submitted the timesheet
- Date and time the supervisor approved the timesheet
- Date and time the timesheet was submitted to UCPath by the department time administrator (DTA).

- 6. Navigate to the Manage My Staff tab.
- 7. Go to the Manage Timesheets tab.
- 8. Enter the Employee ID and/or Employee Name.
- 9. Enter the pay period end date of the timesheet you wish to create.
- 10. Click on Create Timesheet.

Opt-In Email (Primary Supervisor Only)

The primary supervisor can set up notification preferences. Under **Manage My Staff**, select Supervisor Notification.

Manage My Time +	Manage My Staff - M	anage Employee + Review/Submit Payroll + Generate Reports + Manage Feeder + Maintenance +
	Approve as Primary Approve as Backup	fication
	Search Timesheet Create Timesheet	visor Only - Notification of Employee Timesheet Submission
	Supervisor Notification Pay Status Hour Report	receive this notification, you will get an email whenever your employee's timesheet is submitted. In to the due reminder email you get if the timesheets of any of your employees have not been approved by the deadline.

- 1. Navigate to the Manage My Staff.
- 2. Select Supervisor Notification.
- 3. Choose your preference of employee email notifications you would like to receive. You have two options:
 - Yes: I also want to receive a notification every time my employee submits the timesheet.
 - No: I do not want to receive a notification every time my employee submits the timesheet.
- 4. Click Submit My Preference.

Note: When choosing the "Yes" option TRS will send out notification when the employee submits a current timesheet before the employee deadline

in - Manage My Staff - Manage Employee - Review/Submit Payroll - Generate Reports - Manage Foeder - Maintenance -	
Supervisor Notification	
For Primary Supervisor Only - Netlification of Employee Timesheart Submittion	
If you choose to receive this notification, you will get an email whenever your employee's timesheet is submitted.	
This is in addition to the due remendar email you get if the tenesheals of any of your employees have not been approved by the deadline.	
Would you like to start receiving this additional email notification?	
O YES: Labo want to receive nutification every time my employee submits the timesheet.	
NOLI do not want to receive notification every time my employee submits the timesheet. This is your current preherence.	
C Submit My Professiona	
For Backup Supervisor Only - Due Date Remoider Email	
You are not designated as a backup supervisor for any primary supervisor. This option is not available for you	

Employees with Multiple UCPath Jobs

TRS loads one Assignment per UCPath Job, so employees with multiple TRS-eligible UCPath Jobs will have multiple Assignments in TRS and thus, multiple timesheets in TRS, too.

Action	Employee Name	Assignment Name	Job ID	Empl Rcd	Job Start Date	Job End Date	Primary Supervisor	Backup Supervisor
20	Kinene Ricklin	Edu/Instruction & Research / GSR TRAINEE/FELLOW SUPPLEMENT	1400	2	10/01/23	06/30/2024	Denied 1	-
20	Justice Research	Edu/Instruction & Research / GSR-FELLOWSHIP-TUIT&FEE REM	7942	3	10/01/23	06/30/2024	therein the	1000 101

Multiple Timesheet Profiles

Employees with multiple Jobs belonging to more than one Timesheet Profile will not have all assignments loaded into TRS. In this scenario, only the first available job will load to TRS. Subsequently employees will only see the timesheet(s) for the job(s) that successfully loaded to TRS.

Example:

Employees holds 2 active jobs:

Rec 0 under Profile 2 (Monthly Exempt Salary) and Rec 1 under Profile 5 (Monthly Exempt Hourly). TRS will only load the first available job and will error out the second.

We understand that while salary jobs only need to report leave taken, hourly jobs need to report positive time worked to receive pay. If all departments involved agree to have the hourly job be the one that is loaded into TRS, please submit an EEC case to the Central Time Administration group, attaching the written agreement for assistance with manual updating to TRS.

Note that following manual updates, leave taken for the salary job will need to be reported/tracked outside of TRS.

NEED ASSISTANCE?

Contact Us

Email <u>hrpayroll@ucop.edu</u> with any questions.

TRS Deadlines

All employees should refer to the TRS Payday Calendar. The calendar lists the TRS deadlines. It is extremely important to be aware of the timesheet submission deadlines to ensure a timely payment.

The TRS deadlines are managed by the Payroll Division and are posted online at https://www.ucop.edu/local-human-resources/op-life/payroll/time-reporting.html

TRS Help

Visit our website https://www.ucop.edu/local-human-resources/op-life/payroll/time-reporting.html

Contact your supervisor if you have questions on how you should report your time in TRS.