UC Davis **Time Reporting System (TRS)** User Guide for **Supervisors**

Questions or issues regarding TRS should be referred to the TRS Resources website or to your Department Time Administrator (DTA).

Last Revised: 10/12/16

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Welcome to TRS!

Welcome to the UC Time Reporting System (TRS)! This information is for individuals who have been designated as a **supervisor** (**primary** or **backup**) in TRS for their department.

Primary and Backup Supervisors and Responsibilities

In TRS, there is a **primary** supervisor, a **backup** supervisor, and an **optional backup** supervisor role. 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 **backup/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** /**optional backup** supervisor, you should contact the primary supervisor of that employee first.

The Department Time Administrator (DTA) assigned to your department is responsible for the assignment and maintenance of **primary** and **backup**/**optional backup** supervisor records for each employee in your department. If you should/should not be listed as the supervisor (**primary** or **backup**/**optional backup**) for a particular employee/group of employees, please contact your Department Time Administrator for assistance. The DTA is also responsible for updating the supervisor information for employees that transition from one appointment to another.

If a **primary** supervisor is not set up for an employee, the employee will receive a warning message and will be unable to save or submit a timesheet.

If a **backup** supervisor is not set up for an employee, the employee will receive a warning message and will be unable to save or a submit a timesheet. 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.

Optional backup supervisor is purely optional. The employee will receive no warning if an optional backup supervisor is not assigned.

Primary, **backup**, and **optional backup** supervisors should not be subordinate to the employee.

The supervisor (**primary** and **backup**/**optional backup**) is responsible for knowing the work schedule of the employee(s) for which they are approving a timesheet as they are certifying the information is correct when they approve it. Incorrect timesheets should be returned to the employee for correction and re-submission.

Supervisors are also responsible for reviewing the maximum vacation accruals for their employees and working with their employees to develop a "vacation plan" to use accrued vacation.

TRS Timesheet Submission Deadlines

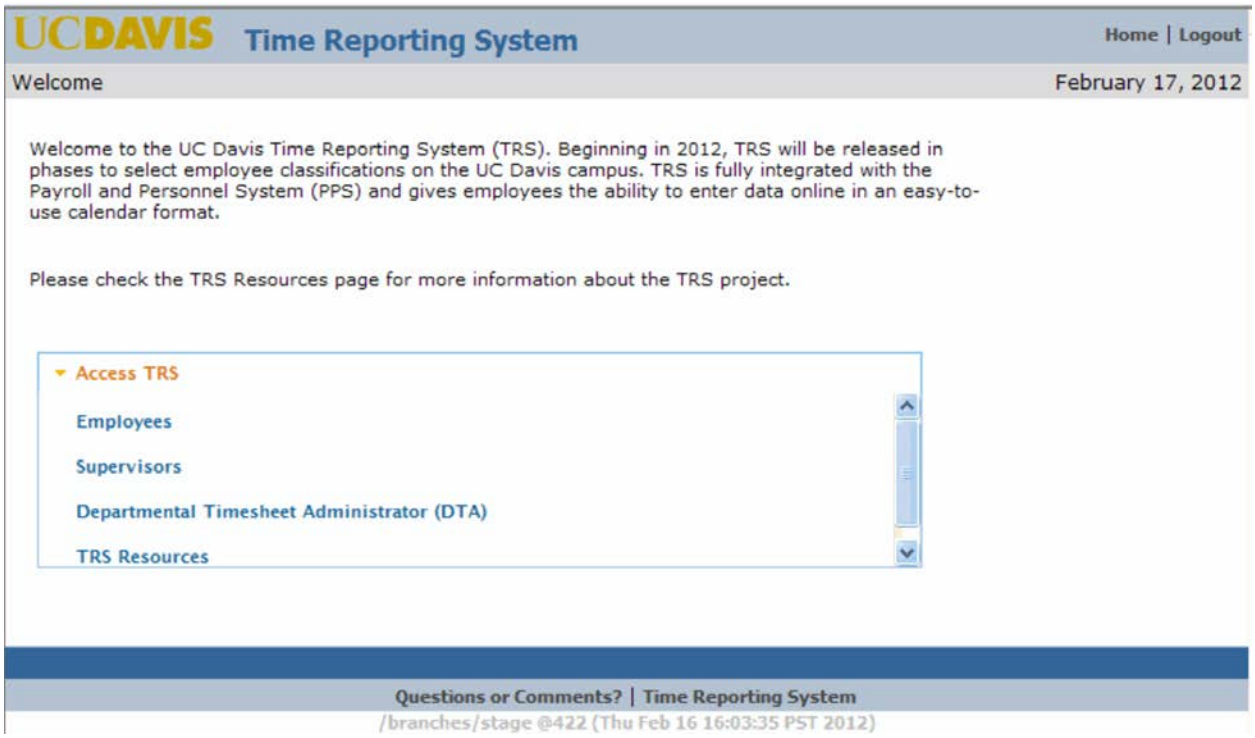
Supervisors should refer to the deadlines on the TRS informational website. It is extremely important that you are aware of the timesheet submission deadlines to ensure that your employees are paid in a timely fashion.

E-Mail Notifications

When certain transactions occur (e.g., supervisor returns a timesheet for correction) or do not occur (e.g., failure to submit timesheet on time), TRS will generate an e-mail notification. The e-mail notice is sent to your e-mail address listed in the campus directory. Please see the Email Notifications page on the TRS website to see when emails are generated. You should read all e-mail notices carefully to ensure that any actions required by you are completed properly and on time.

Logging in to TRS

The direct link is http://trs.ucdavis.edu. Log in using your UCD login ID and Kerberos password. If you cannot remember your login ID/password, please visit the Computing Accounts page for assistance.



Once on the TRS main page select the **Supervisors** link.

You can select the **TRS Resources** link to learn more about TRS, including an FAQ and Best Practices section.

Manage My Staff Tab

Upon logging in using the **Supervisor** link, the user will be on the **Manage My Staff** tab.

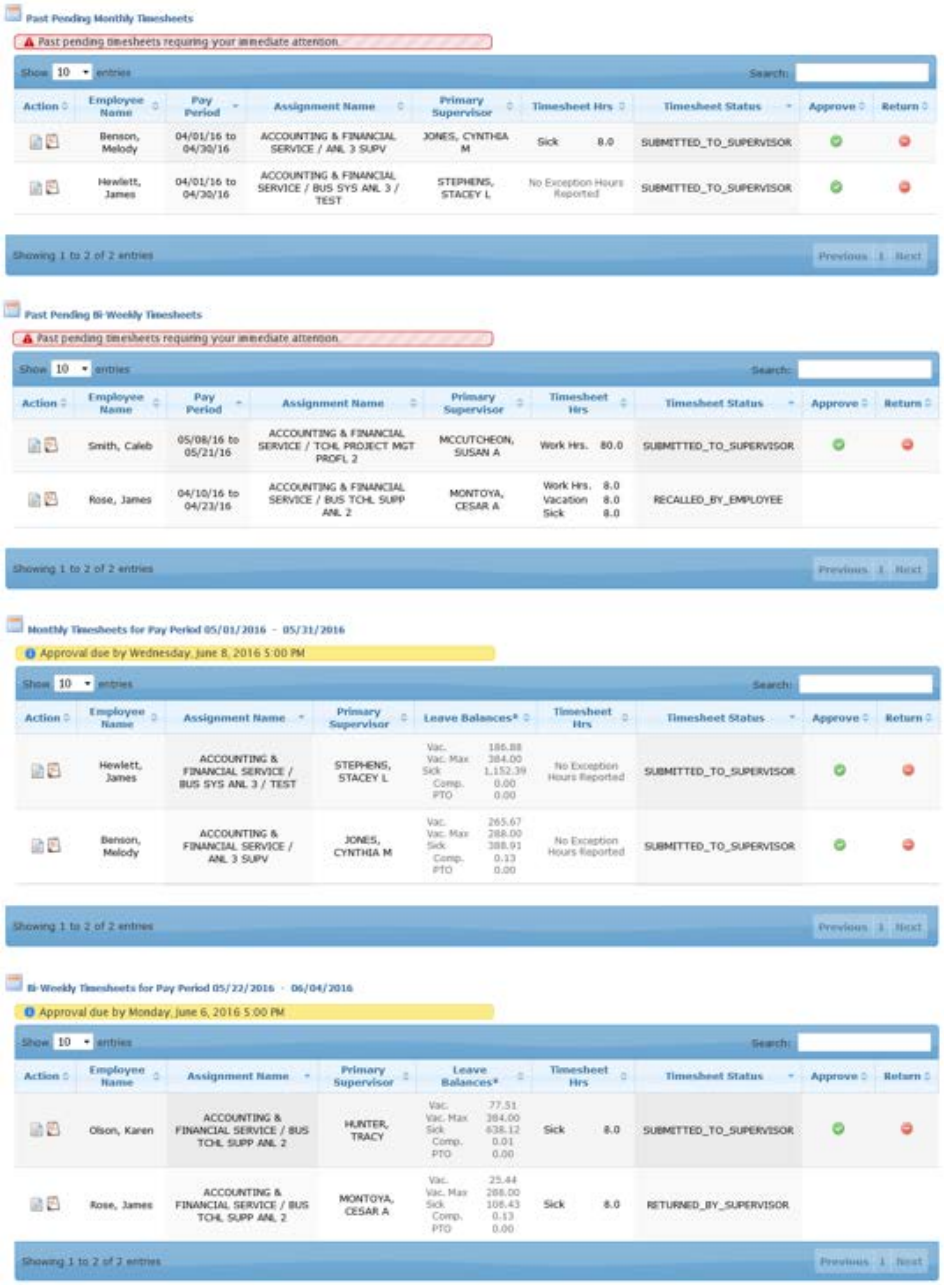
The **Manage My Staff** tab has four sub tabs:

1. **Approve as Primary** – Used by Primary Supervisors to review/approve timesheets.
2. **Approve as Backup** – Used by 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.
4. **Set up Notification**– Used by Primary Supervisors to Opt-in or Opt-out of timesheet submitted notifications from employees

Note: Supervisors may also have one additional tab. The **Manage My Time** tab contains the supervisor's own timesheet. Please refer to the appropriate employee user guide (Biweekly or Monthly) to learn how to complete and submit your own timesheet.

Approve as Primary or Backup Sub Tabs

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



The Roster displays up to 6 main sections:

A. Reminder notification: a yellow or red alert located at the top, reminding supervisors of the timesheet due date.

1. Past Pending Monthly Timesheets
2. Past Pending Biweekly Timesheets
3. Current Monthly Timesheets

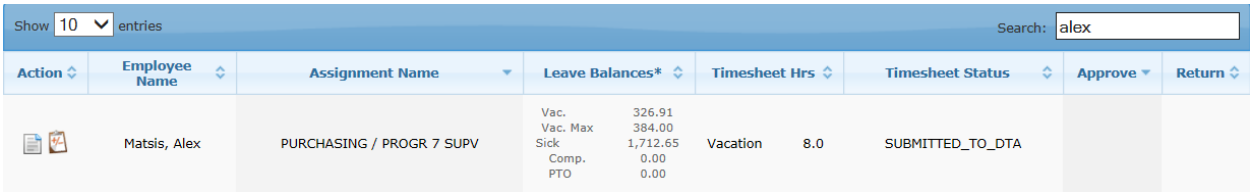
4. Current Biweekly Timesheets
5. Monthly Timesheets Future
6. Biweekly Timesheets Future

The Roster

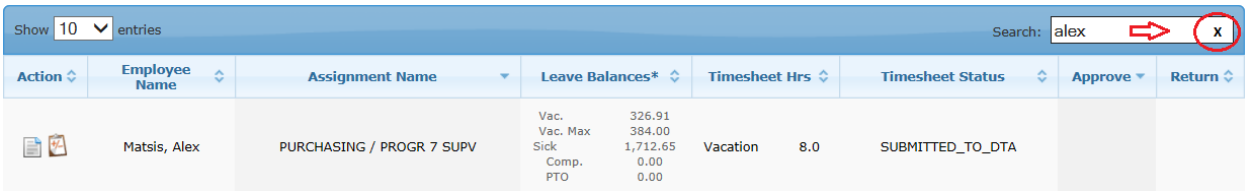
The roster column headings are:

- **Action** – up to two icons are displayed, they are:
  - "View Timesheet" icon Select this icon to view an employee timesheet.
  - "View Workflow" icon Select this icon to view the workflow of a timesheet.
- **Employee Name** – names are displayed by last name, first name. [Sortable column]
- **Pay Period** – timesheet dates are displayed by pay periods. [Sortable column]
- **Assignment Name** – unique appointment information. [Sortable column]
- **Leave Balances –** includes vacation, vacation max, sick and comp time accrued.
- **Timesheet Hours** – displays hours reported for that timesheet.
- **Timesheet status** – displays the current status of the timesheet. [Sortable column]
- **Approve** – an optional avenue of approving and submitting a timesheet to the Department Time Administrator (DTA).
- **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 if the employee recalls the timesheet.

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



When you are done, click on the “x” and you will go back to your timesheet list.



To sort a column, click on the up/down icon next to the column title.

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.

Click the **Timesheet Status** column header to sort the status codes:

- ***NONE:** The employee has not started (saved) or submitted the timesheet to the supervisor.
- ***SAVED:** The employee has saved (but not submitted) their timesheet.
- **SUBMITTED_TO_SUPERVISOR:** The employee has submitted the timesheet to the supervisor and it is awaiting approval.
- **SUBMITTED_TO_DTA:** The supervisor has already approved the timesheet and it has automatically routed to the DTA for processing in the Payroll and Personnel System (PPS). NOTE: A Timesheet does not route to the DTA until the supervisor has approved it.

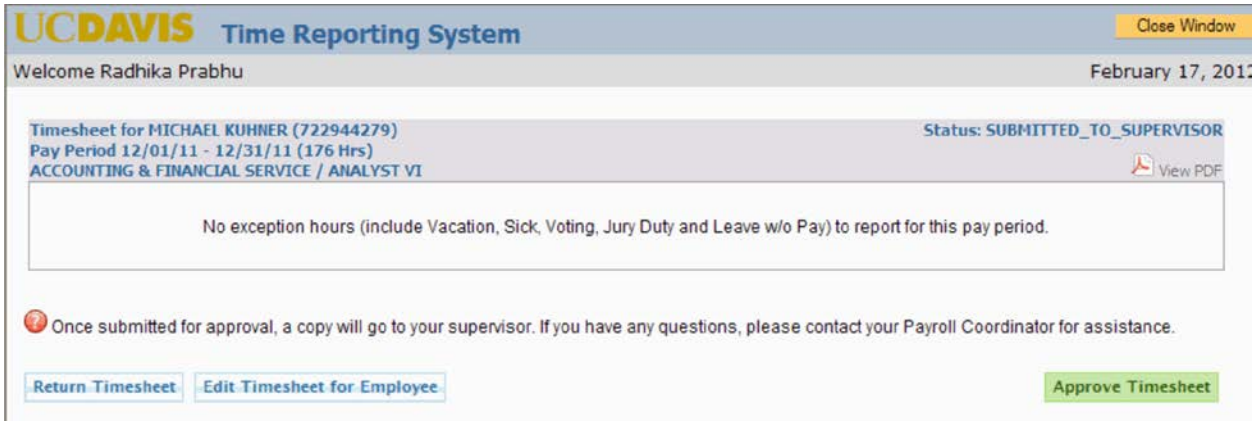
*Supervisors should pay close attention to timesheets indicated as “None” or “Saved.” If a timesheet is not submitted to the supervisor/time approver by the employee deadline, the employee may not be paid in a timely manner.

Reviewing/Approving Timesheets for Various Employee Types

Reviewing a monthly-paid employee timesheet with no leave reported

Monthly-paid employees are exempt employees, meaning that they are **not** eligible to claim overtime. Monthly employees only enter **leave** time (e.g., vacation, sick) on their timesheets; they do not enter any work hours on their timesheets.

Upon selecting the View Timesheet icon for a Monthly employee with no leave reported, a screen similar to the one below will be displayed.



Supervisors will be defaulted into this section when reviewing a Monthly employee timesheet with **no** leave time reported by the employee for the month.

Leave time includes:

•Vacation
•Sick
•Jury Duty
•LWOP (Leave Without Pay)

The screen includes Employee name and employee ID, Pay Period begin and end dates, Basic appointment information (department/title code name/job assignment), Timesheet Status, section explaining that no exception hours (vacation, sick etc.) have been reported, and an option to view and/or print a PDF copy of a timesheet.
There are three options available to supervisors each time a timesheet has been submitted for their approval:

- Click **Approve Timesheet** if the information is correct, and the timesheet will automatically route to the assigned Department Time Administrator (DTA) for PPS

processing. If this button is clicked in error, you will need to contact the DTA and request that they return the timesheet to you.

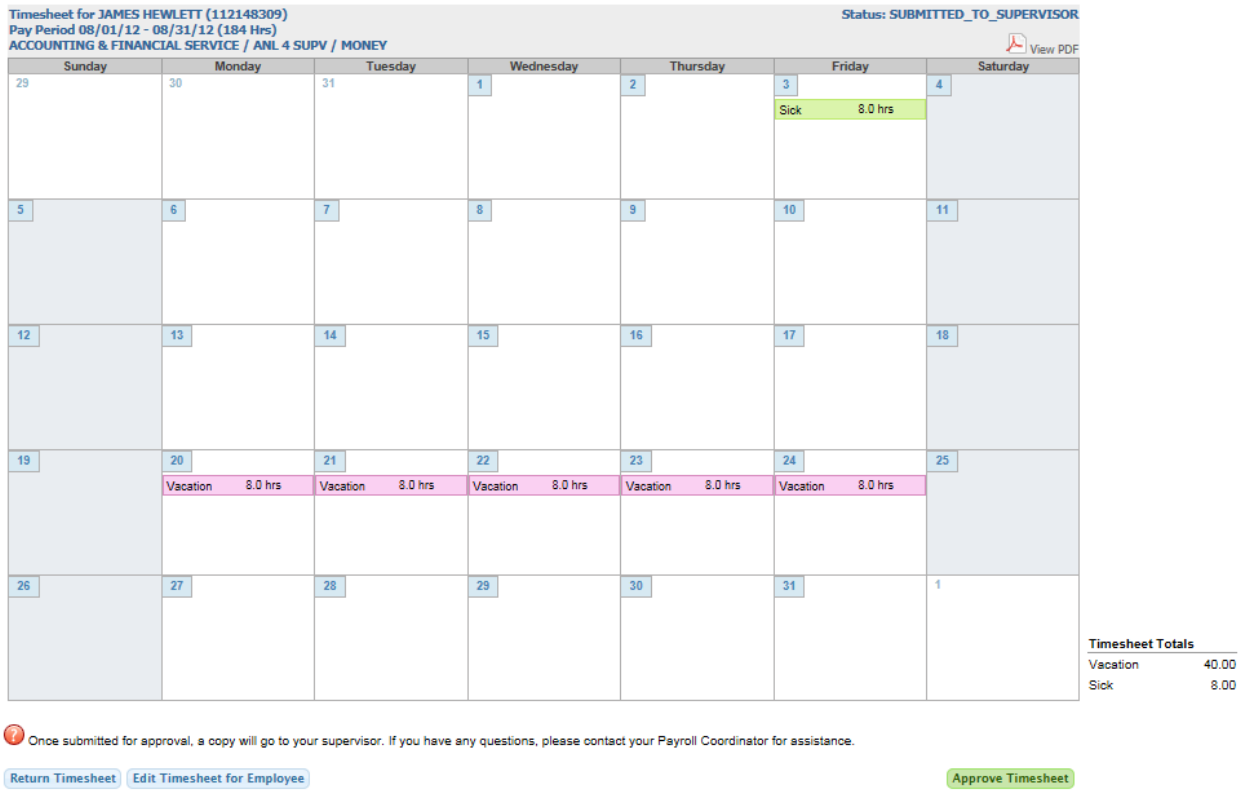
- Click **Return Timesheet** if changes or corrections must be performed by the employee. An email notification will automatically be sent to the employee if the supervisor returns a timesheet.

- 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 e-mail advising them that their supervisor has modified the timesheet; the e-mail will indicate what was changed by the supervisor, along with any comments entered by the supervisor. The e-mail will include a link to the timesheet which will ask the employee to acknowledge the timesheet modification.

Reviewing a monthly-paid employee timesheet with leave hours reported for the month.

Monthly-paid employees are exempt employees, meaning that they are **not** eligible to claim overtime. Monthly employees only enter leave time on their timesheets; they do not enter any work hours on their timesheets.

Upon selecting the "View Timesheet" icon a timesheet will be displayed:



Timesheet Layout:

- Employee name and ID
- Pay Period – begin and end dates
- Basic appointment information – department/title code name/job assignment
- Status – current status of a timesheet
- Calendar – for the current pay cycle
- Timesheet totals – Only displays leave hours (e.g. vacation, sick) for monthly employees.
- Timesheet Modifications (if applicable) – all changes made after an employee submits a timesheet will be logged in this section
- View PDF Timesheet - View or print out a PDF copy of a timesheet, by selecting the **View PDF** timesheet button

There are three options available to supervisors each time a timesheet has been submitted for their approval:

- Click **Approve Timesheet** if all hours reported by the employee are complete and accurate. The timesheet will automatically route to the assigned Department Time Administrator (DTA) for PPS processing. If this button is clicked in error, you will need to contact the DTA and request that they return the timesheet to you.

- 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.

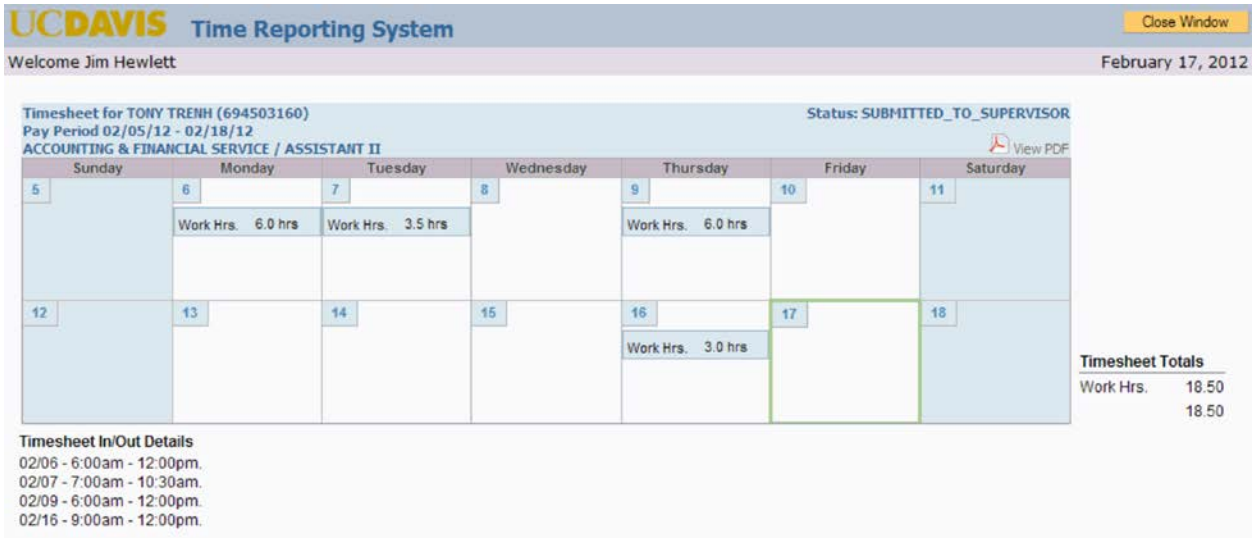
- Click **Edit Timesheet for Employee** only in extreme cases where an employee is not available to make edits to their timesheet. This button allows the supervisor to make edits on behalf of the employee. If this function is used, the employee will receive an e-mail advising them that their supervisor has modified the timesheet; the e-mail will indicate what was changed by the supervisor, along with any comments entered by the supervisor. The e-mail will include a link to the timesheet which will ask the employee to acknowledge the timesheet modification.

Reviewing a biweekly-paid employee timesheet

Biweekly-paid employees are non-exempt employees, meaning that they are eligible to claim overtime. In accordance with the Federal Fair Labor and 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.

Upon selecting the "View Timesheet" icon a timesheet will be displayed for the Supervisor to view. The work calendar will change based upon the employee's pay cycle.

The timesheet will display a work calendar for the two-week Pay Period:



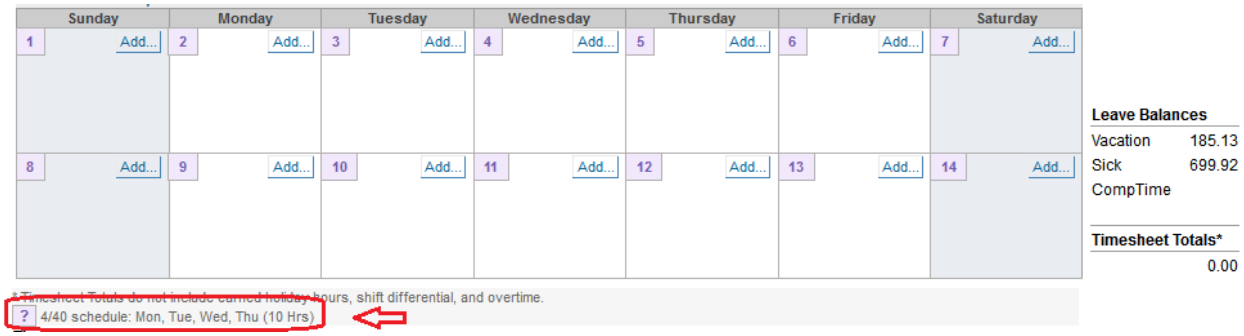
Supervisors of biweekly employees should verify that they have entered **both** their work and leave time. If they have not, the supervisor should return the timesheet to the employee so that they can make any needed corrections. Work hours and any leave hours reported are displayed in the calendar and in the **Timesheet Totals** section. If a biweekly employee fails to enter their work hours on their timesheet, their pay for that period could be delayed.

> 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 actually worked on the holiday. TRS will automatically calculate any applicable holiday premium pay.

A Supervisor can view the details of the work hours (including time in and time out and lunch in and lunch out) reported by reviewing the **Timesheet In/Out Details** (bottom left corner of the calendar).

Alternate Work Schedule

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



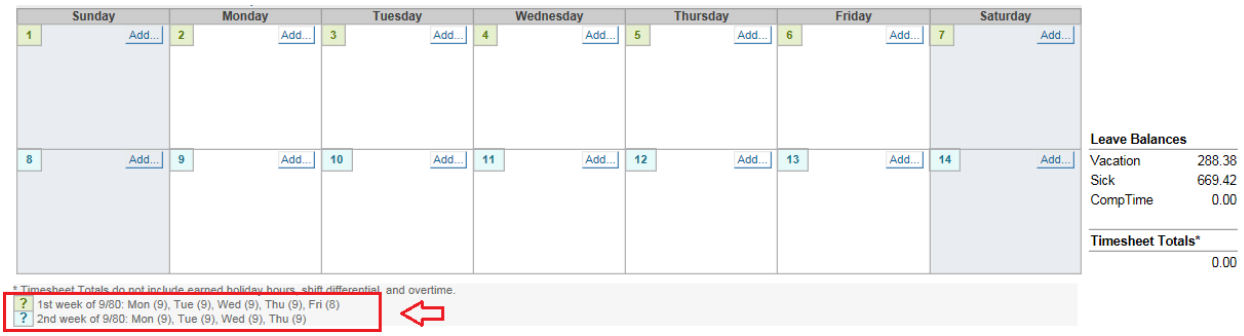
To help the employee identify the work week, the data fields are color coded in TRS:

4/40 Work Schedule

- Week 1 & 2- purple

9/80 Work Schedule

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



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

If a biweekly employee works an alternate work schedule (4/40, 9/80), 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 in excess of 8 hours.

Please note that the Time Reporting System does not accommodate other alternate work schedules, other than 4/40 and 9/80, at this time.

After reviewing a timesheet, a supervisor can perform one of the following actions: **Approve Timesheet**, **Return Timesheet**, or **Edit Timesheet for Employee**:

- Click **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 PPS processing. If this button is clicked in error, you will need to contact the DTA and request that they return the timesheet to you.

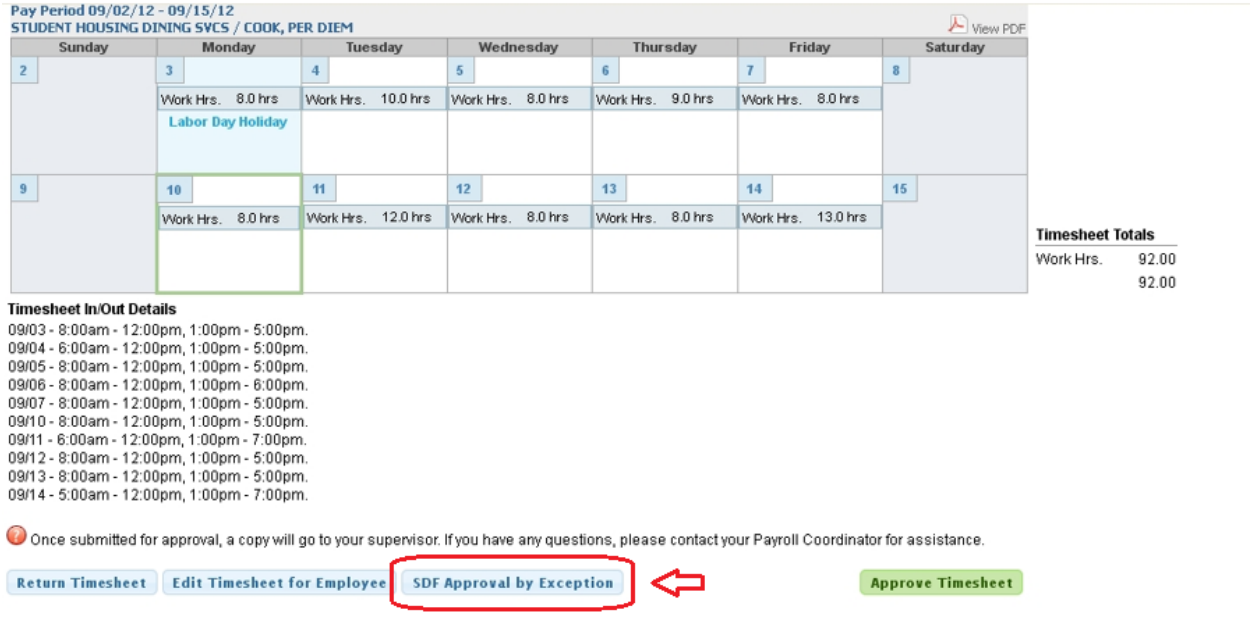
- Click **Return Timesheet** if changes or corrections must be performed by the employee. This option should be used if the biweekly employee failed to enter their work hours on their timesheet. An email notification will automatically be sent to the employee if the supervisor returns a timesheet.

- 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 e-mail advising them that their supervisor has modified the timesheet; the e-mail will indicate what was changed by the supervisor, along with any comments entered by the supervisor. The e-mail will include a link to the timesheet which will ask the employee to acknowledge the timesheet modification.

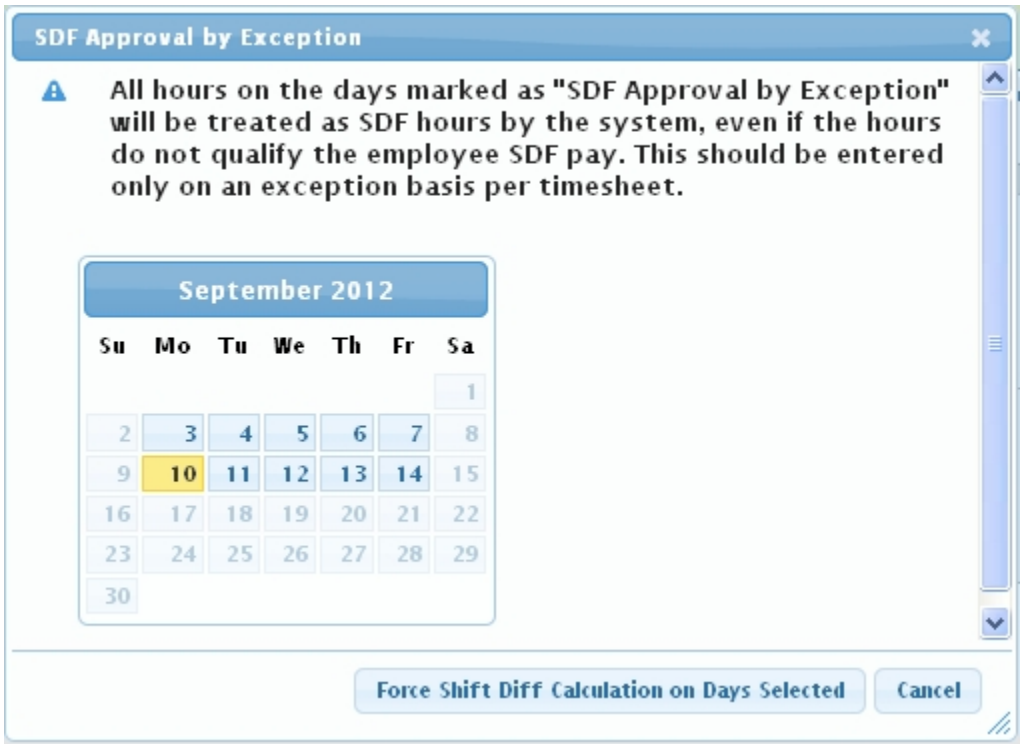
Shift Differentials

Some biweekly employees may have what is known as a shift differential. 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 a shift differential (SDF), the supervisor will be presented with an option at the bottom of the timesheet that will allow them to select days to be excluded from SDF pay calculations. This option will only appear if the employee is eligible for shift differential and worked hours that would qualify them for shift differential.

In the example below, the biweekly employee has entered work hours that cross over from one shift to another (day to night). The supervisor will see an **SDF Approval by Exception** button at the bottom of the timesheet.



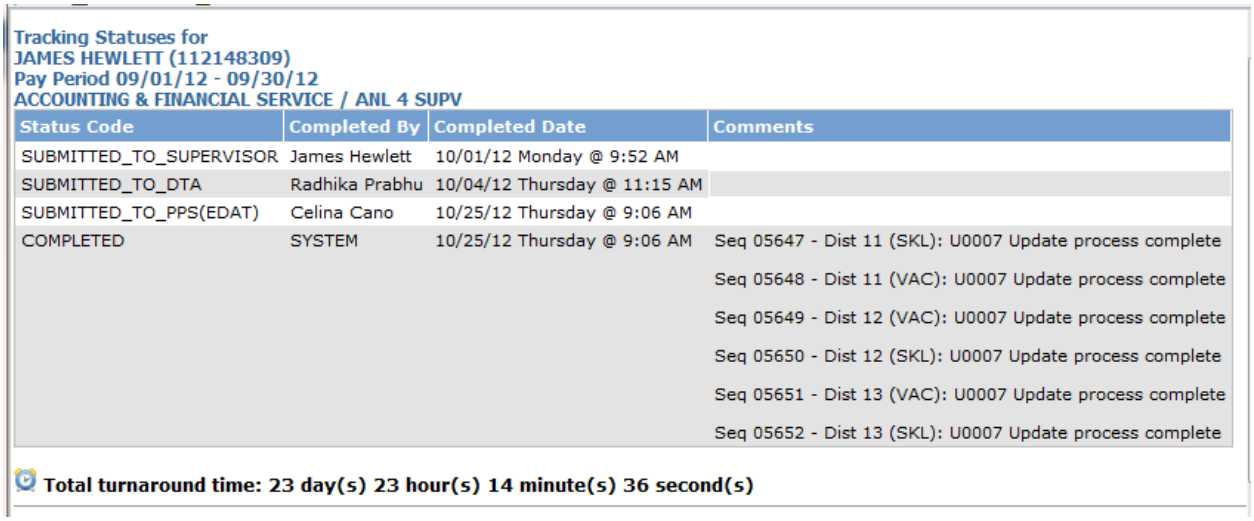
If the supervisor clicks the **SDF Approval by Exception** button, they will receive the prompt below. The supervisor should review the applicable shift differential policies if they are unsure of how to process the SDF.



Timesheet Workflow

On the timesheet roster screen (accessible from the **Approve as Primary** or **Approve as Backup** sub-tabs), there is workflow icon ; 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 Payroll & Personnel System (PPS), 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 the Personnel Payroll System (PPS) by the Department Time Administrator (DTA)



Tracking Statuses for
JAMES HEWLETT (112148309)
Pay Period 09/01/12 - 09/30/12
ACCOUNTING & FINANCIAL SERVICE / ANL 4 SUPV

Status Code	Completed By	Completed Date	Comments
SUBMITTED_TO_SUPERVISOR	James Hewlett	10/01/12 Monday @ 9:52 AM	
SUBMITTED_TO_DTA	Radhika Prabhu	10/04/12 Thursday @ 11:15 AM	
SUBMITTED_TO_PPS(EDAT)	Celina Cano	10/25/12 Thursday @ 9:06 AM	
COMPLETED	SYSTEM	10/25/12 Thursday @ 9:06 AM	Seq 05647 - Dist 11 (SKL): U0007 Update process complete
			Seq 05648 - Dist 11 (VAC): U0007 Update process complete
			Seq 05649 - Dist 12 (VAC): U0007 Update process complete
			Seq 05650 - Dist 12 (SKL): U0007 Update process complete
			Seq 05651 - Dist 13 (VAC): U0007 Update process complete
			Seq 05652 - Dist 13 (SKL): U0007 Update process complete

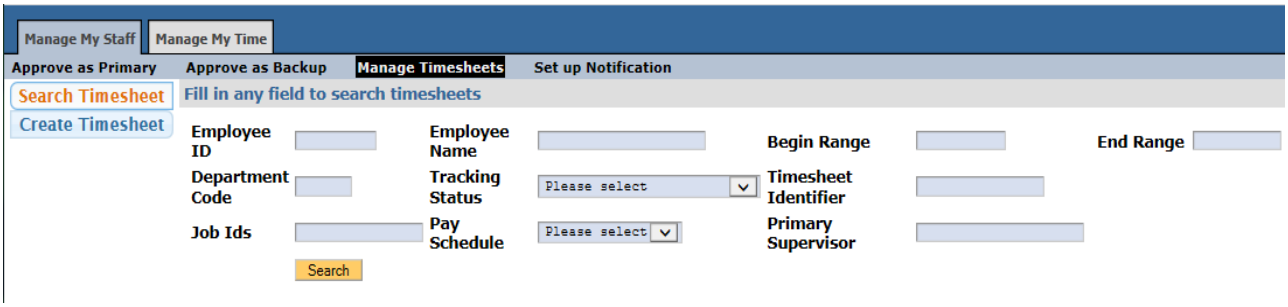
Total turnaround time: 23 day(s) 23 hour(s) 14 minute(s) 36 second(s)

- Name/ Employee ID Number
- Pay Period/Title/Job Assignment
- Status Code
- Completed By – individual that performed the action on the timesheet
- Completed Date – the date and time the action was performed
- Comments – all comments entered by the person in the **Completed By** field will display

- Total turnaround time – the total time it took to process the timesheet from the date and time you submitted it to your supervisor to the date and time it was COMPLETED. This field will only be displayed if the timesheet has reached the COMPLETED status.

Manage Timesheets/Create Timesheet on Behalf of Employee

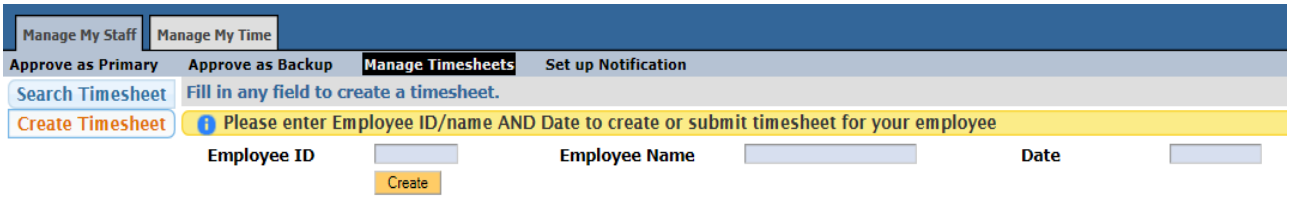
Click on the **Manage Timesheets** sub tab to look up the status of timesheets or create a timesheet on behalf of an employee that you supervise.



The **Search Timesheet** screen allows supervisors to search for timesheets based on one or more of the following criteria:

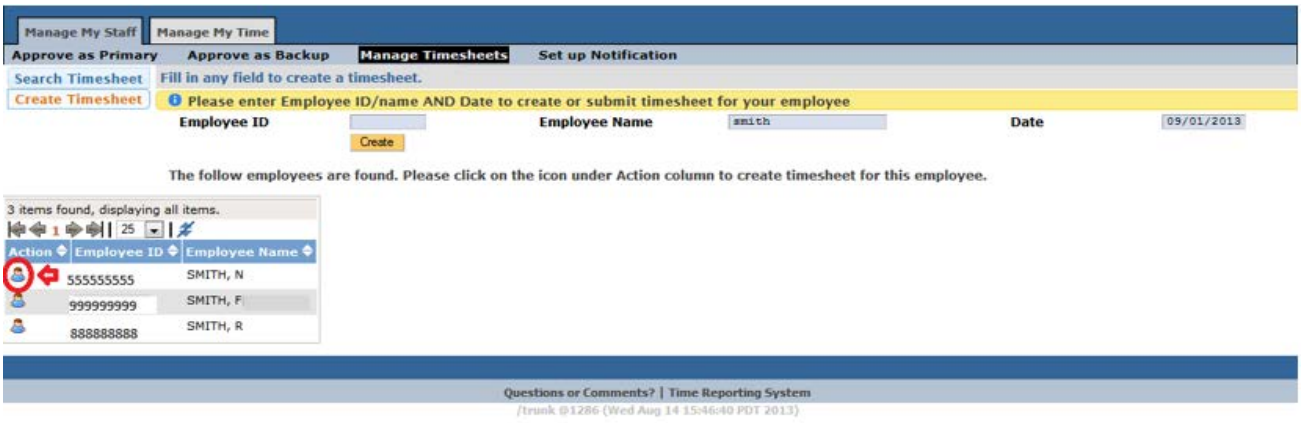
- Employee ID – 9-digit employee ID number
- Employee name – First name last name or last name, first name
- Begin Date - Pay period begin date
- End Date - Pay period end date
- Department Code – Six-digit home department code.
- Tracking Status – Select from the available status codes from the drop down menu
- Timesheet Identifier - Job assignment (job nickname if assigned)
- Job Ids – Currently not available

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.

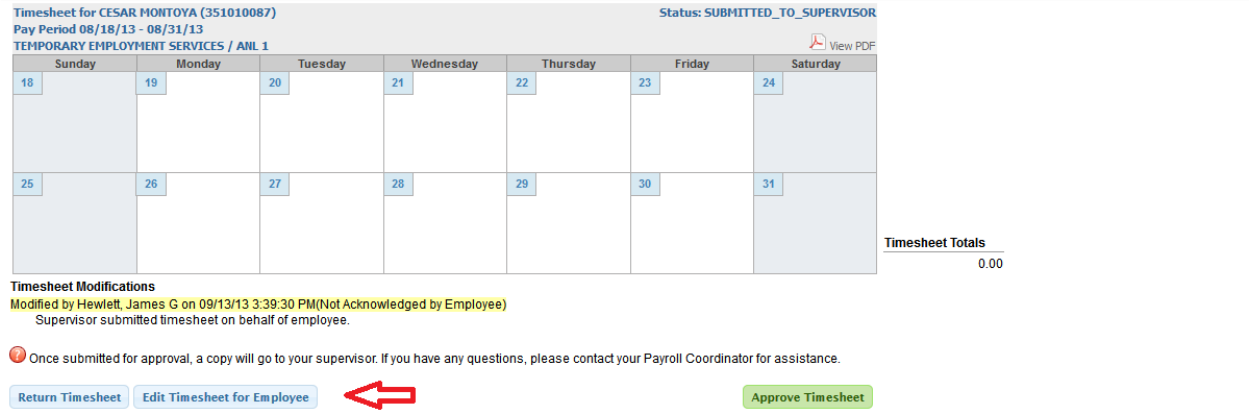


A supervisor can create a timesheet for an employee if the supervisor is the primary/backup/optional supervisor to the employee's assignment in TRS.

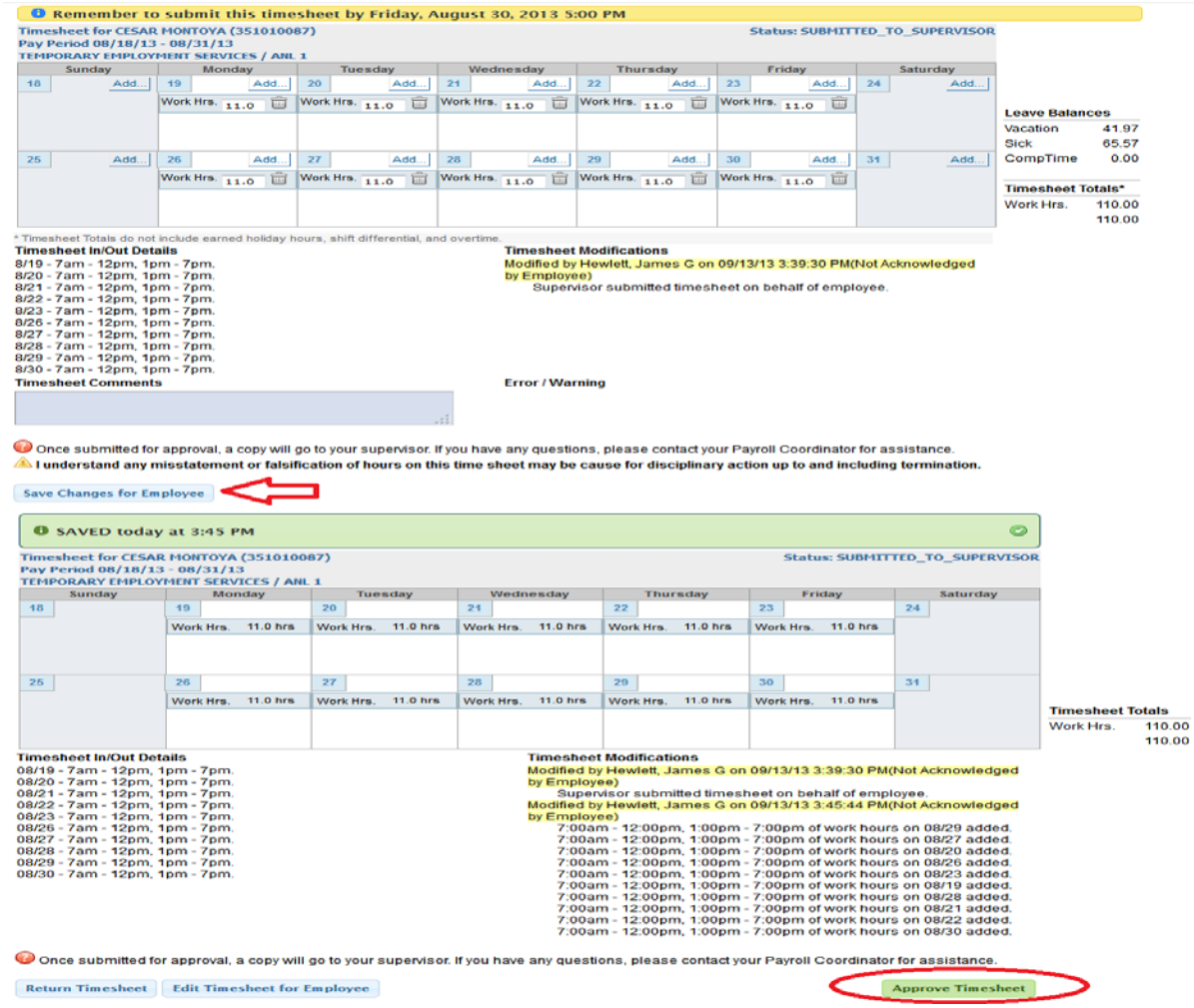
- To **Create a timesheet** enter:
  - Employee ID *or* Employee name (searches are acceptable on just a last or first name; best results occur when searching on the least common part of the name)
  - Pay Period Start Date in the **Date** field.
- If the supervisor uses employee name to perform the search and more than 1 employee is found, the supervisor can click on the employee icon to continue to the next step:



- Once a timesheet is created, the employee's assignment information is displayed below and the message "Created Timesheet successfully" displays. Click on the timesheet icon to open timesheet and click the **Edit Timesheet for Employee** button.



- Once changes have been made to the timesheet, click on the **Save Changes for Employee** button and then **Approve Timesheet**. Add a comment indicating the business reason for creating the timesheet on behalf of the employee, and confirm edit.



- The supervisor comments will now appear on the timesheet. The employee will receive an email notice with the supervisor comments indicating that a timesheet has been created on their behalf. The email will include a link to the supervisor-created timesheet, with a button to acknowledge that the employee has viewed the timesheet.

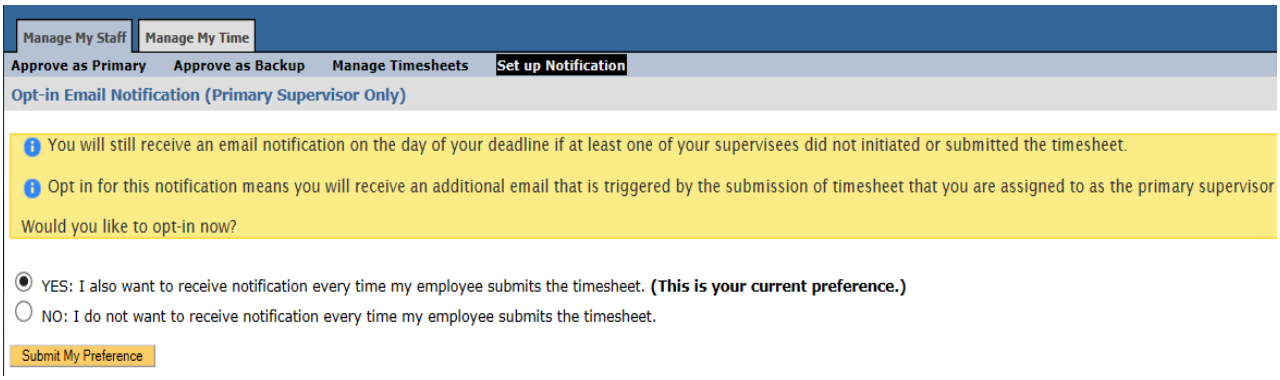
- A supervisor can create a timesheet for an employee that is in one of the following statuses:
  - NONE (never created by employee)
  - SAVED (by employee)
  - RETURNED_BY_SUPERVISOR
  - RECALLED_BY_EMPLOYEE

- A supervisor cannot create a timesheet that is in one of the following statuses:
  - SUBMITTED_TO_SUPERVISOR
  - SUBMITTED_TO_DTA
  - SUBMITTED_TO_PPS (EDAT)
  - COMPLETED

Opt-In Email (Primary Supervisor only)

Click on the **Set up Notification** sub tab to choose your preference of employee email notifications you would like to receive. You have two options:

- Yes: I also want to receive notification every time my employee submits the timesheet
- No: I do not want to receive notification every time my employee submits the timesheet



Click on the option and hit “Submit My Preference” button.

Please note that choosing the “Yes” option TRS will send out notification when the employee submits a current timesheet before the employee deadline.