



Time Study Buddy

... is a cloud-based
time study service
that integrates with existing
payroll time card systems.

Our Customers

Serving California
Departments of:

Human and Social Services
Public Health
Mental Health
Probation
First 5

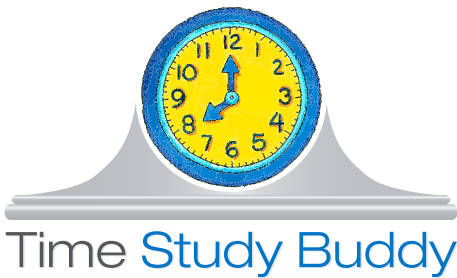


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LOGGING IN

To the Time Study Buddy

WELCOME TO THE TIME STUDY BUDDY

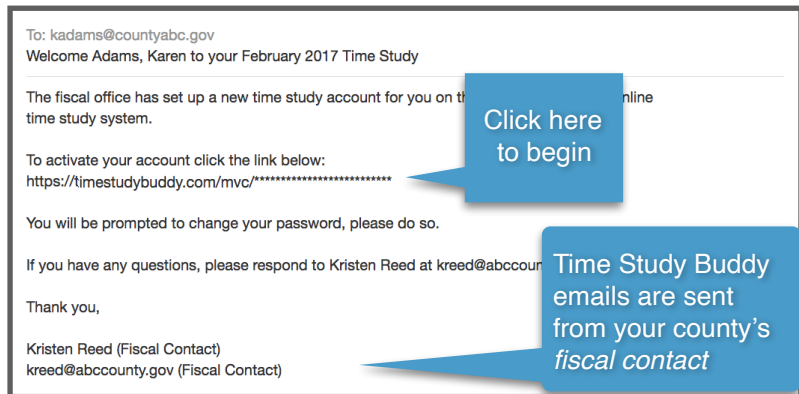
You will receive an email informing you that your time study has been setup and is ready for you to begin.

Clicking on the [login link](#) will open Internet Explorer on your PC and prompt you to enter your password. Pick any password you like.

For help send a message to your county's *fiscal contact* by replying to this email.

If your account with the Time Study Buddy has already been setup, go to our homepage at:

www.timestudybuddy.com and click the green **LOGIN** button in the upper right-hand corner of the homepage.



The screenshot shows the login page with the following elements:

Login to the Time Study Buddy

Email Address

(show) Password

[Click here](#) [Forgot Password](#)

Enter you county email address and password.

If you need help with your password click **FORGOT PASSWORD**. An email will be sent to you.

WORKER TIME STUDY

BEGINNING YOUR TIME STUDY

Starting with the first day, verify the *hours paid* on the top line. This should match your payroll records. You can click on the [pre-filled number](#) to change it. Beginning from the top and working down enter your hours for the day. Click the **DONE** button to advance to the next day.

		Tue (11/1/2016)									
Enter Payroll Information		1	2	3	4	5	6	7	8	9	10
Hours paid	8.00	8.00	8.00	8.00	8.00	-	-	8.00	8.00	8.00	8.00
Less: Paid time off		-	-	-	-	-	-	-	-	-	-
Hours worked		8.00	8.00	8.00	8.00	-	-	8.00	8.00	8.00	8.00
Enter Hours Worked		used: 0.00 of 8.00									
1442	CWS HR - Family Maintenance		-	-	-	-	-	-	-	-	-
1443	CWS HR - Family Reunification		-	-	-	-	-	-	-	-	-
1444	CWS HR - Permanent Placement		-	-	-	-	-	-	-	-	-
1465	CWS - Services		-	-	-	-	-	-	-	-	-
1482	CWS Case Mgt. - Family Maintenance		-	-	-	-	-	-	-	-	-
1483	CWS Case Mgt. - Family Reunification		-	-	-	-	-	-	-	-	-
1484	CWS Case Mgt. - Permanent Placement		-	-	-	-	-	-	-	-	-
5134	EA-L Referrals		-	-	-	-	-	-	-	-	-
		DONE									

Begin here and work down

Fiscal indicators, green = good, red = bad

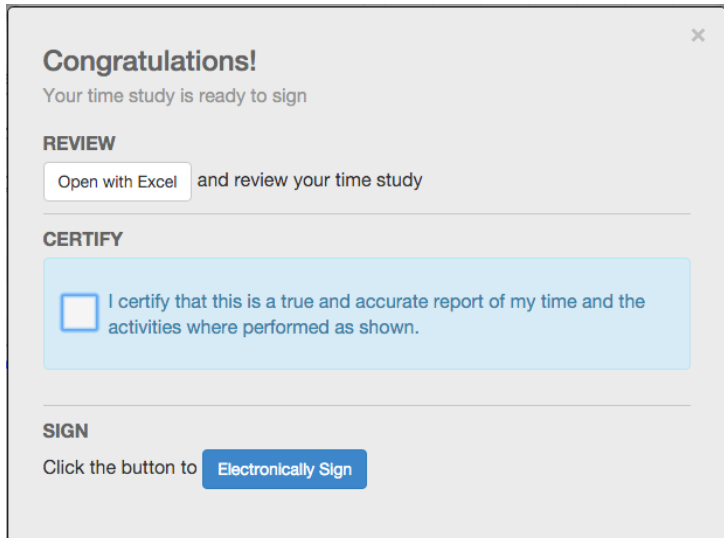
Click on a code number to see its full description

When the day is complete, click DONE to advance to the next day

SIGN ELECTRONICALLY

When your monthly time study has been completed it is ready for your electronic signature. Check the **CERTIFY** box, then click the **ELECTRONICALLY SIGN** button.

If you just do a middle month time study for each quarter, you will be notified by email when it's time to begin your next middle month time study.



Congratulations!
Your time study is ready to sign

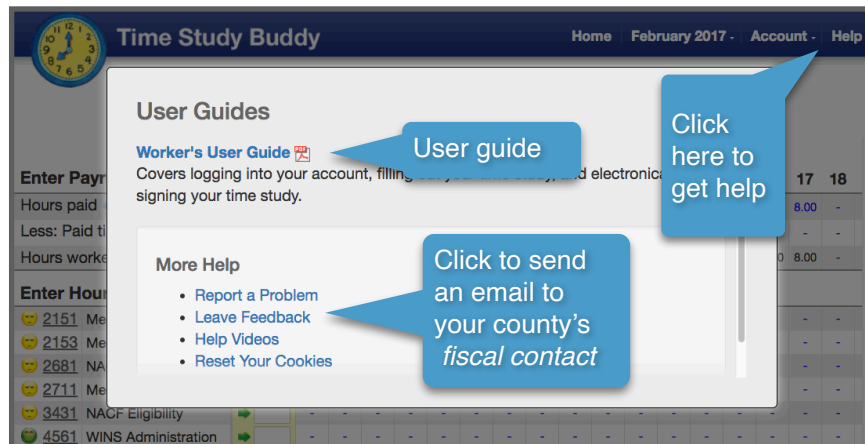
REVIEW
Open with Excel and review your time study

CERTIFY
 I certify that this is a true and accurate report of my time and the activities where performed as shown.

SIGN
Click the button to **Electronically Sign**

GETTING HELP

Click the **HELP** button in the upper right-hand corner of your time study screen. From the popup screen you can view the user guide or send an email to your county's *fiscal contact*.



Time Study Buddy Home February 2017 Account Help

User Guides
[Worker's User Guide](#)
Covers logging into your account, filling out your time study, and electronically signing your time study.

More Help

- Report a Problem
- Leave Feedback
- Help Videos
- Reset Your Cookies

Click here to get help

Click to send an email to your county's *fiscal contact*

Enter Payroll
Hours paid
Less: Paid time
Hours worked

Enter Hours
2151 Me
2153 Me
2681 NA
2711 Me
3431 NACF Eligibility
4561 WINS Administration

	17	18
	8.00	-
	-	-
	8.00	-
	-	-
	-	-
	-	-
	-	-
	-	-
	-	-
	-	-

SUPERVISOR TIME STUDY

SUPERVISOR TIME STUDY

Welcome to the Time Study Buddy. As a supervisor you have access to your worker's time study so that you can review, approve and electronically sign them.

Depending on whether or not you prepare a time study yourself, you will see one of the following screens:

Supervisor **with** a time study:

The screenshot shows the 'Time Study Buddy' interface for a supervisor with an active time study. The header includes a clock icon, the title 'Time Study Buddy', and navigation links for 'Home', 'Supervising - November 2015', 'Account', and 'Help'. Below the header, there is a message '1 Enter November 2015 Time Study'. The main section is titled 'Enter Payroll Information' and contains a table with columns for days of the month (1-17) and rows for 'Hours paid', 'Less: Paid time off', and 'Hours worked'. A dropdown menu is open, listing workers with their names and status (e.g., 'Brown, James' with a green pencil icon, 'Christensen, Pearl' with a green 'DONE' button). Below the table, there is a section for 'Enter Hours Worked' with a 'Super' button and a link to 'Add Program Code'.

Supervisor **without** a time study:

The screenshot shows the 'Time Study Buddy' interface for a supervisor without an active time study. The header includes a clock icon, the title 'Time Study Buddy', and navigation links for 'Home', 'November 2015', 'Account', and 'Help'. Below the header, there is a message 'Christine Braun, welcome to the Time Study Buddy'. The main section is a table with columns for 'Name', 'Unit', and 'Status'. The table lists several workers and their status (e.g., 'Coleman, Penny' with a green pencil icon, 'Cudney, Brittany' with a green pencil icon, 'Kirwan, Denny' with a green 'DONE' button, etc.).

Name	Unit	Status
Coleman, Penny	HHFS	
Cudney, Brittany	HHFS	
Kirwan, Denny	HHFS	
Lang, Christie	HHFS	
Leek, Bella	HHFS	
McClenagan, Linda	HHFS	
Todd, Laura	HHFS	

In both situations you have access to your worker's time study by clicking on their [status icon](#). Managers can drill down through multiple levels to access any time study within their chain of supervision.

Brown, James		waiting for signature
Christensen, Pearl	DONE	
Fredriks, Cindi	DONE	signed and approved
Gillan, Dill		waiting for approval
Neubauer, Lynda	DONE	
Nolen, Lawrence		43% complete
Nunez, Helen		has not logged in
Wise, Shirley	DONE	

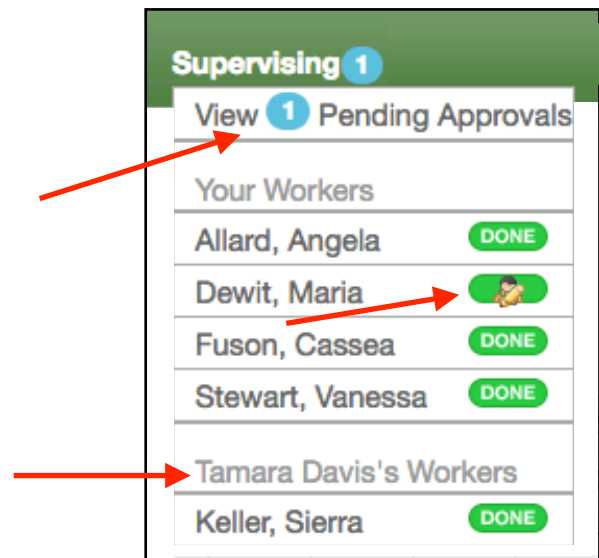
If there are worker time studies waiting for your approval, you will be notified by email.

Also, on your own time study you will see a number in the green menu bar indicating that there are worker time studies waiting for your approval.

Click on the [Waiting for Approval](#) status icon to review and electronically approve the worker's time study.

Backup Supervisors - These supervisors can access and electronically approve the worker's time study. However, they do not receive email notifications and are excluded from *supervisor calculations*.

Backup workers are displayed underneath.



On the approval screen, click the **CERTIFY** box and then the **ELECTRONICALLY APPROVE** button to electronically approve a worker's time study.

Approval Pending ×

Nikki Baker's November 2015 time study is pending electronic approval.

REVIEW

and review Nikki Baker's time study.

CERTIFY

I certify that the employee's time records have been examined and that, to the best of my knowledge and belief, this time record is true and correct and the activities were performed as shown.

SIGN

Click the button to

Sometimes it is necessary to sign a time study on behalf of one of your workers. When doing so, you will be prompted to write an explanation as to why. These explanations are saved for future reference.

EXPLAIN

Explain why you are signing on behalf of Nikki Baker.

UNLOCK and PRINT Buttons

After approving one of your worker's time studies, it is locked and cannot be modified.

The **UNLOCK** button allows you to unlock their time study to make changes. Doing so will revert the status to "waiting for signature."

The **PRINT** button opens their time study in Excel to view or print.

Thank you for using the Time Study Buddy. 😊

2	3	4	5	Total
8.00	8.00	8.00	-	160.00
-	-	-	-	24.00
8.00	8.00	8.00	-	136.00
1.50	7.00	2.25	-	52.75
5.00	-	-	-	5.00
-	-	0.25	-	14.25
1.50	1.00	5.50	-	50.00
-	-	-	-	0.00
-	-	-	-	0.00
-	-	-	-	14.00
				UNLOCK
				PRINT

HUMAN AND SOCIAL SERVICES ADMINISTRATION

HUMAN AND SOCIAL SERVICES - ADMINISTRATION

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 - 17 Exclude from Reports
 - 17 Reset Time Study
 - 17 Remove Account
- 18 WORKER UNIT
 - 18 OCT/NOV/DEC - Time studies and their status during the quarter
 - 19 COMMENTS and FLAGS
 - 19 VERIFICATION to PAYROLL TIME RECORDS

Email	Worker Information	Oct/Nov/Dec	Comments	Verification
Alexander, Samantha			0	
Barlaan, William			0	
Bauer, Colleen				
Carson, Virginia				
Chung, Norma				
Cumberland, Deborah				
De Leon, Brienne	AF			
Erazo, [unclear]	AI			
James, [unclear]	AF			
Kearson, [unclear]	AF			
Martin, [unclear]	AF			
Morale, [unclear]	AI			
Nguyen, [unclear]	AF			
Samsco, [unclear]	AI			
Williams, [unclear]	AF			

Callouts in the image:

- Click to view or edit this worker's account setup information (points to Worker Information column)
- Click to send an email to this worker, or to a group of workers (points to Email Log column)
- Click to access this worker's time study (points to Oct/Nov/Dec column)
- Click to verify this worker's payroll time records to their time study (points to Verification column)

MAIN SCREEN - ACTIONS

- 21 SEARCH BOX
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 - 21 Excluded from Reports Workers
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 - 21 Limit to Supervisors and other filters
 - 22 Per Page setting

November 2016 Time Studies

search by name or unit [input field] [x]

Actions [dropdown arrow]

Actions [x]

Add Time Study

Worker Types

Normal Workers

Excluded from Reports

No Time Study

Worker Filters

Limit to Supervisors

Limit to Deleted Accounts

Unit: showing all units [dropdown arrow]

Unit Group: showing all unit groups [dropdown arrow]

Location: showing all locations [dropdown arrow]

Worker type: showing all worker types [dropdown arrow]

Month: showing all time studies [dropdown arrow]

Status: showing all states [dropdown arrow]

Options

Per Page: 250 [dropdown arrow]

GOLD MENU BAR



Time Study Buddy Home Admin · Nov 2016 · Account · Help
created on 12/20/2016 10:10:47 AM

- 27 HELP MENU
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 - 34 Locations
 - 34 Holidays
 - 35 Fiscal Contact
 - 35 Program Codes
- 36 ACCOUNT MENU

Each fiscal quarter exists in its own database shell. Click on any previous quarter to access.

3Q FY16-17 -	
✓ 3 rd Qtr FY16-17	
2 nd Qtr FY16-17	
1 st Qtr FY16-17	
4 th Qtr FY15-16	
3 rd Qtr FY15-16	
2 nd Qtr FY15-16	
1 st Qtr FY15-16	
4 th Qtr FY14-15	
3 rd Qtr FY14-15	
2 nd Qtr FY14-15	
1 st Qtr FY14-15	
4 th Qtr FY13-14	

OTHER

- 37 MAA/TCM DIFFERENCES
- 41 PAYROLL INTEGRATION OPTIONS
- 45 MOBILE DEVICE APP
- 47 SPECIAL SITUATIONS
- 53 COUNTY OPTIONS
- 60 GLOSSARY

LOGIN

To login click the **LOGIN** button on the home page at www.timestudybuddy.com. From the login screen, enter your email address and password. Then click **LOGIN**.

FORGOT PASSWORD

If you can't remember your password, click the **FORGOT PASSWORD** link on the login screen. You will be prompted to enter your email address, then click the **EMAIL PASSWORD** button. Your password will be emailed to you. Clicking on the [link contained within the email](#) will automatically log you onto the Time Study Buddy.

Login to the Time Study Buddy

Email Address remember email

(show) Password stay logged in

➔
Forgot Password
Login

MAIN ADMIN SCREEN - COLUMNS

Each worker is displayed on one line on the *main admin screen*. The columns are described below. Clicking on the [arrows](#) to the right of each label sorts the workers by that column. ➔

Email	Worker Information ↕	Oct/Nov/Dec ↕	Comments ↕	Verification ↕
<input type="checkbox"/>	Alexander, Samantha		0	
<input type="checkbox"/>	Barlaan, William		0	
<input type="checkbox"/>	Bauer, Colleen			
<input type="checkbox"/>	Carson, Virginia			
<input type="checkbox"/>	Chung, Norma			
<input type="checkbox"/>	Cumberland, Deborah			
<input type="checkbox"/>	De Leon, Brienne	AF		
<input type="checkbox"/>	Erazo, F	AI		
<input type="checkbox"/>	James	AF		
<input type="checkbox"/>	Kearso	AF		
<input type="checkbox"/>	Martin	AF		
<input type="checkbox"/>	Morale	AI		
<input type="checkbox"/>	Nguyen	AF		
<input type="checkbox"/>	Sams	AI		
<input type="checkbox"/>	William	AF		

Click to view or edit this worker's account setup information

Click to verify this worker's payroll time records to their time study

Click to send an email to this worker, or to a group of workers

Click to access this worker's time study

Send Bulk Email

You've selected 3 recipients (show)

Title

Message

- Include Login Link for Workers
- Copy Supervisors
- Copy Others
- Add Attachments

SEND EMAIL Checkbox

The checkboxes on the left-hand column are used to select workers to send email messages to. Then click the **SEND EMAIL** button.

In the pop-up screen, you compose your message and have some checkbox options below, including adding attachments. Then click **SEND**.

Email	Worker Information ↕
<input type="checkbox"/>	Burton, William
<input type="checkbox"/>	Cameron, Virginia
<input checked="" type="checkbox"/>	Cumbie, Deborah
<input checked="" type="checkbox"/>	King, Erin
<input type="checkbox"/>	McClure, Myles
<input checked="" type="checkbox"/>	Musser, Tylene
<input type="checkbox"/>	Saunders, Cheryl
<input type="checkbox"/>	Simmons, Colleen

check all

WORKER INFORMATION COLUMN

Click on a [Worker's Name](#) to view or update that worker's account information tab.

Note: There are 4 tabs at the top, each containing their own screen.

The screenshot shows a web interface for managing worker information. At the top, there are four tabs: 'Account Information', 'Normal Work Week', 'Daily Schedule', and 'Email Log'. The 'Account Information' tab is selected, indicated by a red arrow. Below the tabs, the title 'Account Information for Vicki E. Perez' is displayed, along with an 'Actions' button. The form is divided into three sections: 'Account Information', 'Time Study Information', and 'Job Information'. Each section contains various input fields and dropdown menus. A blue callout box points to the 'End Date' field in the 'Time Study Information' section, containing the text: 'This field is used to remove an account. You can reactivate it by either editing or deleting the date entered.'

Account Information	
Name	Perez, Vicki E.
Employee Identifier	3100872
Email Address	vperez@yourcounty.gov
Hold Email	No
Permissions	None

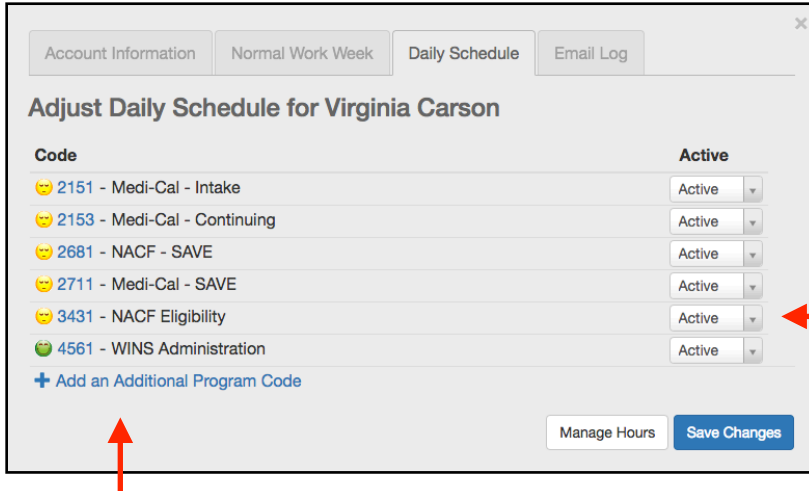
Time Study Information	
Time Study Type	Mid-Month
Unit	Eligibility
Supervisors	× Yalung, Sandra
Backup Supervisors	× Achter, Ashley
Location	Main Office
Start Date	6/11/2018
End Date	

Job Information	
Worker Type	Eligibility Worker
Job Title	EW II
Full-Time	Yes
Supervisor/Manager	No

ACCOUNT INFORMATION - For details see pages 23-25 of this guide.

NORMAL WORK WEEK - For details see page 25 of this guide.

DAILY SCHEDULE - This is where changes are made to a worker's assigned codes and hours.



To remove a code click the **ACTIVE** drop-down button and select **INACTIVE**.

To add a code, click the **ADD AN ADDITIONAL PROGRAM CODE** button to open the program code screen (see page 35). Select the codes to add by checking the box, then click the **ADD CODES** button.

Click the **MANAGE HOURS** button to change the hours assigned to each code.

The existing values were setup automatically based on the worker's actual time study entries from the last quarter. Most counties are using this data for the Quarterly Comparison Report (see Other Reports on page 33) to view worker time study changes from quarter to quarter.

However, some counties are using this data in different, creative ways. See Time Study Guidance on page 54.

Code	Active	Last Quarter	Current	Adjust	New
2151 - Medi-Cal - Intake	Active	4.50	2.50		2.50
2153 - Medi-Cal - Continuing	Active	3.25	5.00		5.00
2681 - NACF - SAVE	Active	0.25	-		0.00
2711 - Medi-Cal - SAVE	Active	-	-		0.00
3431 - NACF Eligibility	Active	-	0.50		0.50
4561 - WINS Administration	Active	-	-		0.00
Total		8.00	8.00		8.00

EMAIL LOG

Emails are automatically sent:

1. To newly added workers to login and set their password. This is called the *welcome email*.

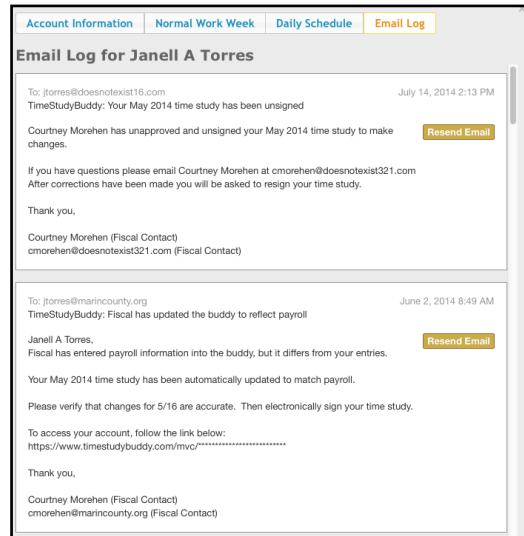
Note: If the new worker is doing a *mid-month* time study, this email is held until the time study period begins.

2. When it's time to begin a new *mid-month* time study.

3. To supervisors to review and approve their worker's completed time studies.

4. To notify workers that their time study does not match their payroll records.

These automatic emails are kept in a log for reference. Those with *administrator* permissions can review the log and resend any email by clicking the **RESEND EMAIL** button.



ACTIONS BUTTON

Note: There are two ACTIONS buttons, one on the worker information screen (shown here), and the other on the *main admin screen*.

Reset Password - Scrambles the existing password and sends the worker an email with a link to reset it.

Send Login Link - Sends an email to the worker containing a link for them to login to the Time Study Buddy.

Exclude from Reports - Excludes a worker's time study results from all reports. This is useful for leaves of absence or when a worker's status is uncertain. On the *main admin screen* and on the Time Study List Report these workers are identified using a red shading.

Reset Time Study - Deletes all of the worker's time study entries for the current quarter. Sometimes you just need to start over.

Warning: Deleted time study entries are not recoverable.

Remove Account - To remove the worker's account go to their *account information screen* and assign an *end date*.



You may reactivate a removed account either by changing or removing their *end date*.

The worker's login access is also revoked. However, there is an option to continue to allow worker access. Removed accounts will disappear from the list of workers the quarter after their *end date* has elapsed. However, you can always update and locate removed accounts by searching for their name.

WORKER UNIT COLUMN - Displays the worker's unit. Click on the [up/down arrows](#) to sort.



OCT/NOV/DEC COLUMN - Time study and status

Each oval [status icon](#) represents one month's time study during the quarter. The graphic inside the status icon represents the status of that month's time study.

- has not logged in
- 48% complete
- waiting for signature
- waiting for approval
- signed and approved

Workers who time study *continuously* will see 3 status icons, one for each month in the quarter.



Clicking on the [status icon](#) opens the worker's time study screen for that month. This is exactly what the worker sees when completing their own time study.

Time Study Buddy

created on 12/20/2016 4:51:58 PM

Home November 2016 - Account - Help

Managing Jeffrey James [Back to Admin](#)


1 Enter November 2016 Time Study
2 Electronically Sign
3 Approve

	Mon (11/7/2016)														
Enter Payroll Information	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Hours paid ?	8.00	8.00	8.00	8.00	-	-	8.00	8.00	8.00	8.00	8.00	-	-	8.00	8.00
Less: Paid time off ?	-	3.50	-	-	-	-		-	-	-	8.00	-	-	-	-
Hours worked	8.00	4.50	8.00	8.00	-	-	8.00	8.00	8.00	8.00	-	-	-	8.00	8.00
Enter Hours Worked							used: 0.00 of 8.00								
2151 Medi-Cal - Intake	1.25	4.50	4.00	2.50	-	-		-	-	-	-	-	-	-	-
2153 Medi-Cal - Continuing	-	-	-	-	-	-		-	-	-	-	-	-	-	-
3431 NACF Eligibility	2.50	-	4.00	-	-	-		-	-	-	-	-	-	-	-
3521 OCOP/GR General Relief	-	-	-	0.25	-	-		-	-	-	-	-	-	-	-
6141 CalWORKs Eligibility	4.00	-	-	4.75	-	-		-	-	-	-	-	-	-	-
6151 Initial Common Eligibility Programs	-	-	-	-	-	-		-	-	-	-	-	-	-	-
6641 Information and Referral	0.25	-	-	0.50	-	-		-	-	-	-	-	-	-	-
(+ Add Program Code)															


Managing Jeffrey James
Back to Admin

Click the **BACK TO ADMIN** button to return to the *main admin screen*.

COMMENTS and FLAGS COLUMN













Comments	
0	
1	
0	

Comments may be added to the worker's account for future reference. They are typically used to notate leaves of absence and worker changes. There is a report available (Admin Menu > Reports > Claim Tab > Comments Report) to view and print all of the *comments* for the quarter.

Lorena Camero's Comments		Flag
Separated 10/02/13 MAL		
Posted by MaryAnn LoBalbo		10/16/2013
Account created using import tool.		
Posted by Brian Gardner		10/15/2012

A flag can be added, usually to indicate a future action is needed.

VERIFICATION to PAYROLL TIME RECORDS COLUMN

Verification	
	
	
	
	
	
	

Each circle indicates a payroll period that coincides with the time study period. In this example the *mid-month* time study period used the full calendar month. Alternately the 28-day method (consisting of two two-week pay periods) can be used.

The color green indicates the *verification* has been completed.

Click on a [circle](#) to pop-up the *verification* screen.

Payroll Verification Screen

Payroll #21 (9/25-10/8)	Payroll #22 (10/9-10/22)	Payroll #23 (10/23-11/5)	Payroll #24 (11/6-11/19)	Payroll #25 (11/20-12/3)	Payroll #26 (12/4-12/17)	Payroll #27 (12/18-12/31)
Enter Payroll Information for Carson, Virginia						
Date	Alloc Hours	Non-Alloc Hours	Total			
11/6	-	<input type="text"/>	<input type="text"/>			
11/7	8.00	<input type="text"/>	8.00			
11/8	8.00	<input type="text"/>	8.00			
11/9	8.00	<input type="text"/>	8.00			
11/10	8.00	<input type="text"/>	8.00			
11/11	-	8.00	8.00			
11/12	-	<input type="text"/>	<input type="text"/>			
11/13	-	<input type="text"/>	<input type="text"/>			
11/14	8.00	<input type="text"/>	8.00			
11/15	8.00	<input type="text"/>	8.00			
11/16	8.00	<input type="text"/>	8.00			
11/17	7.00	1.00	8.00			
11/18	8.00	<input type="text"/>	8.00			
11/19	-	<input type="text"/>	<input type="text"/>			
Total	71.00	9.00	80.00			

C O S O F C
V E R I F Y

All of the pay periods within the quarter can be accessed by clicking on the [Pay Period](#) at the top of the screen.

Each screen is pre-populated with the total and non-allocable hours from the worker's time study.

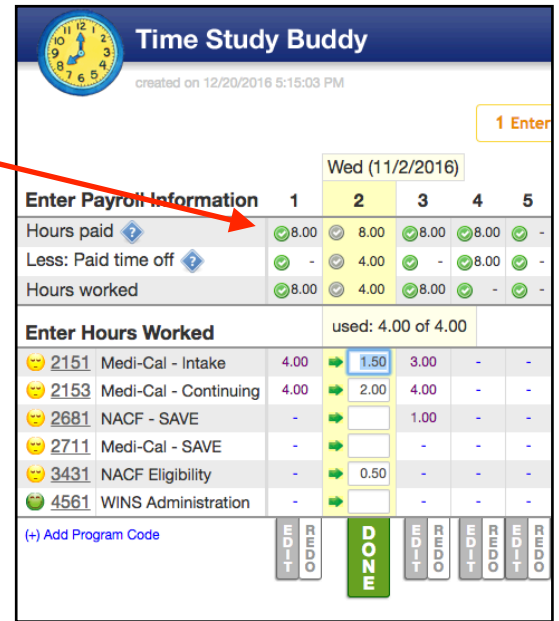
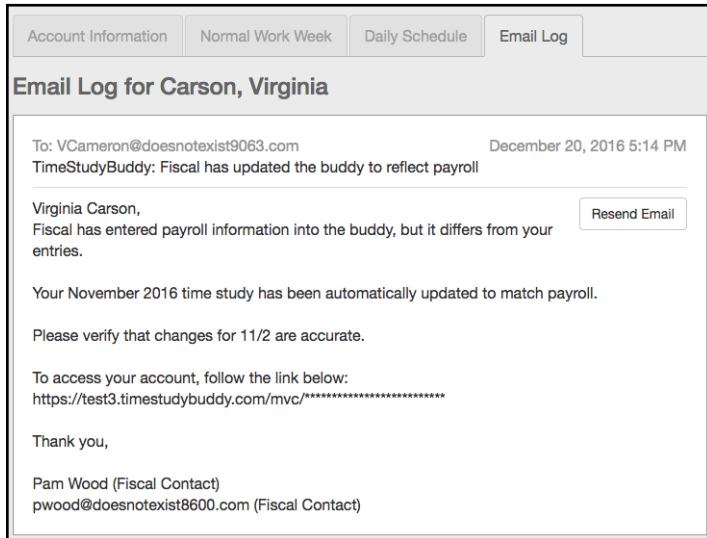
With the payroll time sheet in-hand or on-screen, verify the non-allocable and total hours from the payroll. Make corrections as needed, and then click **VERIFY**.

Continued on the next page

After verifying a payroll:

Green check marks are placed on the worker's time study next to the verified amounts, and the worker can no longer edit those fields because they are locked.

Also, if there were any corrections a few more things happen automatically:

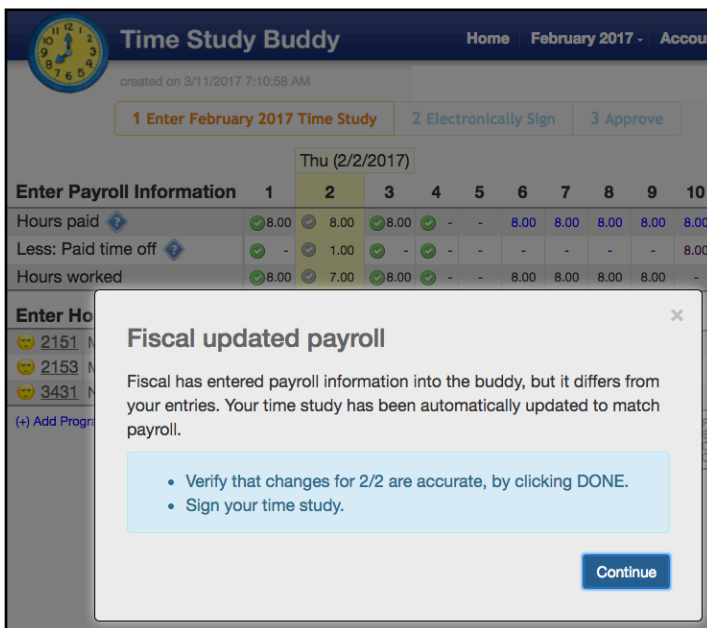


1. If the worker's time study was already electronically signed, it is unsigned.

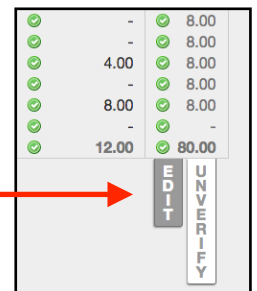
2. An email is sent to the worker letting them know there were differences between their time study and payroll. It asks them to review the days changed and then to electronically re-sign.

3. Upon returning to their time study screen, the worker is prompted to review the automatic correction (using pro-rata logic), to make any changes if needed.

If there is more than one correction they will then advance to the next one, and once finished, taken to the electronic signature screen.



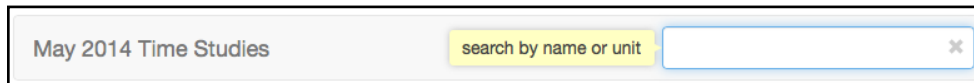
If a payroll was verified incorrectly, click either the **EDIT** or **UNVERIFY** button to make changes.



MAIN SCREEN - ACTIONS

The *main admin screen* can be filtered in a variety of ways. This is particularly useful for counties with a large number of workers.

SEARCH BOX



Type a worker or unit name in the box to search for it. The search will find any worker in the database, and is not limited to just those displayed on the *main admin screen*. To cancel, click the **X** in the box.

ACTIONS BUTTON on the *main admin screen*

Filters by Worker Types - Check the box to select the worker types to be displayed on the *main admin screen*.

Normal Workers - The default

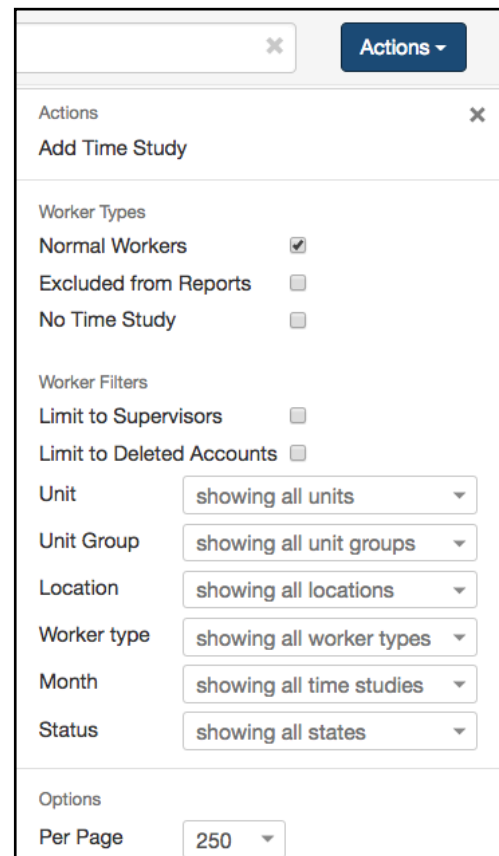
Excluded from Reports Workers - These workers have been excluded from all reports. See Exclude from Reports on page 17. Click the [box](#) to display them on the *main admin screen*. Excluded workers are shaded red when displayed.

No Time Study Workers - These workers (typically managers) have an account but do not have a time study. They use their account to electronically approve the time studies of their supervisees.

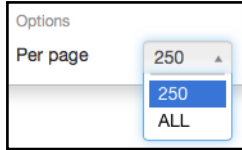
Filters to Limit the Display:

Limit to Supervisors - Check to box to only display supervisors. They are shaded green when displayed on the *main admin screen*.

Additional Filters: - A variety of other filters are available. Click on the [drop-down arrow](#) to select from a variety of choices.

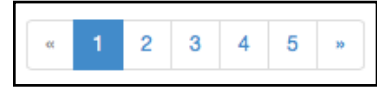


You can get creative (and sometimes lost) with multiple filters. To clear all filters, click the **CLEAR FILTERS** button displayed at the bottom of the *main admin screen*.



Per Page - For large organizations this limits the number of accounts displayed on the *main admin screen* to speed up access.

For example, if there are 1,200 accounts and “250 per page” is selected, they would be spread over 5 screens, and accessed using page buttons. This allows each page to load faster.



Note: Regardless of the filters used or the *per page* selection, the search box searches the entire database.

ADD TIME STUDY

To add new workers click **ADD TIME STUDY** located at the top of the Actions Button screen. If you are adding over 50 workers please contact Time Study Buddy staff to find out if it would be easier to upload the data instead.

There are several sections to the setup:

- Account Information
- Time Study Information
- Job Information
- Normal Work Week
- Prior Time Study
- Unit Daily Schedule

Details for completing each section are covered on pages 23-26.

Add Time Study - February 2018

Account Information

Name:

Employee Identifier:

Email Address:

Verify Email Address:

Hold Email:

Permissions:

Time Study Information

Time Study Type:

Unit:

Supervisors:

Backup Supervisors:

Location:

Start Date:

Job Information

Worker Type:

Job Title:

Full-Time:

Supervisor/Manager:

Normal Work Week

	Week 1	Week 2
Sun		
Mon	8.00	8.00
Tue	8.00	8.00
Wed	8.00	8.00
Thu	8.00	8.00
Fri	8.00	8.00
Sat		
40.00		40.00
Grand Total		80.00

Unit Daily Schedule

Code	Hours
3431	2.75
2153	2.25
2151	1.50
2111	1.00
6141	0.50
Total	8.00

Recommendation: Every field in the screen above can be edited later. If you are missing some information, we recommend using a **best guess** as a temporary placeholder.

ACCOUNT INFORMATION

Name - Enter the worker's last name, comma, then first name and middle initial if available.

Employee Identifier - This is usually the worker's payroll ID. However, do not use confidential personal information such as a social security number. This field is optional.

Email Address - Carefully enter the email address.

Verify Email Address - If you typed in the email address, type it again here. The most common data entry error is an incorrect email address.

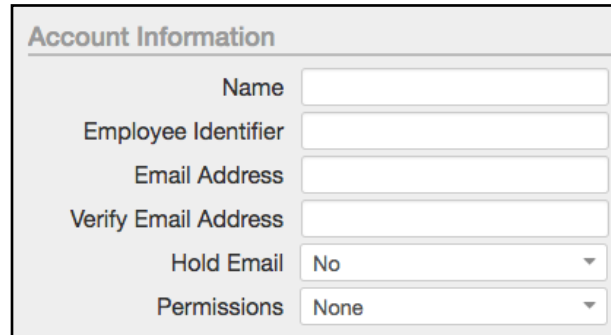
Hold Email - Select YES to **hold** all automatic emails generated by the Time Study Buddy. Change the setting to NO to immediately send out emails on **hold**.

Permissions:

None - For most workers including supervisors. Supervisor permissions are automatically added to an account when another worker selects them as their supervisor.

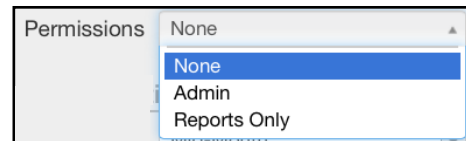
Admin - They have access to all accounts and all administrative features, including reports. All *administrators* should be adequately trained and the number should be kept to a minimum.

Reports Only - This permission was designed for managers and analysts. It provides them with access to reports, but without access to the other administrative features.



The screenshot shows a form titled "Account Information" with the following fields:

Name	<input type="text"/>
Employee Identifier	<input type="text"/>
Email Address	<input type="text"/>
Verify Email Address	<input type="text"/>
Hold Email	No <input type="button" value="v"/>
Permissions	None <input type="button" value="v"/>



The screenshot shows a dropdown menu for "Permissions" with the following options:

Permissions	None <input type="button" value="v"/>
	None
	Admin
	Reports Only

TIME STUDY INFORMATION

Time Study Type - The default is *mid-month* except for Staff Development and EDP Staff. As an option any worker type can be *continuous*, and workers can be switched from *continuous* to *mid-month* and vice versa at any time.

The hours of workers who *continuously* time study are automatically converted to a *mid-month* equivalent for all reports. See the Convert Continuous to Mid-Month Report on page 30.

Does Not Time Study is for workers (typically managers) who need to electronically approve time studies of their supervisees but don't have one themselves.

Unit - Select from the drop-down list. The units must be setup in advance. You can temporarily select a substitute unit and update it later.

Supervisor - Click **ASSIGN** to select a name from the pop-up list. The supervisor for the worker's unit appears at the top of the list.

It is allowable to assign no supervisor, or more than one supervisor.

Backup Supervisor - These supervisors can access and electronically approve the worker's time study. However, they do not receive email notifications and are excluded from *supervisor calculations*.

Location - Select from the drop-down list. The locations must be setup in advance. You can temporarily select a substitute location and update it later.

Start Date - This is the date the worker begins their time study and is used to create their initial time study input screens.

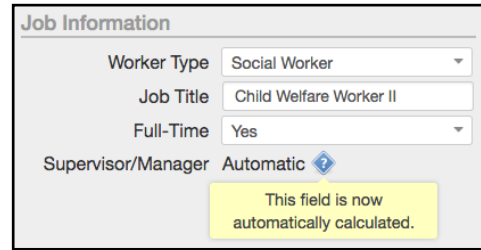
It is also used to send out a *welcome email* containing their login information.

If the *start date* is in the past, the *welcome email* goes out immediately. If in the future, the email is held until that date arrives. For those doing a *mid-month* time study, it is additionally held until the beginning of the *mid-month*.

End Date - Entering an *end date* automatically zeros out any subsequent days during the current quarter, and in future quarters removes the worker's account. Entries may be edited, and if the date previously entered is deleted, the account is reactivated.

JOB INFORMATION

Worker Type - Select one of the 9 official worker types, also called cost pools. A 10th worker type called *extraneous* is also available.



Job Information

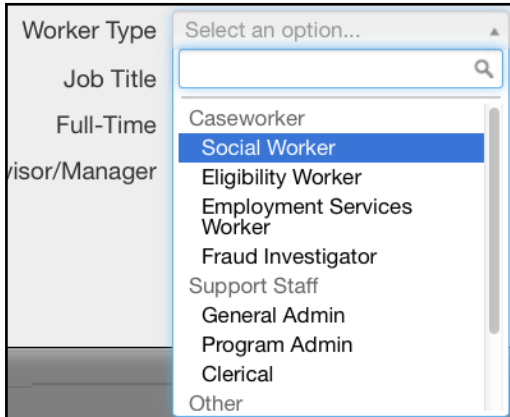
Worker Type: Social Worker

Job Title: Child Welfare Worker II

Full-Time: Yes

Supervisor/Manager: Automatic

This field is now automatically calculated.



Worker Type: Select an option...

Job Title: [Search]

Full-Time: [Dropdown]

Supervisor/Manager: [Dropdown]

- Caseworker
- Social Worker**
- Eligibility Worker
- Employment Services Worker
- Fraud Investigator
- Support Staff
- General Admin
- Program Admin
- Clerical
- Other

Generally, anyone included in the county's social services budget unit must complete a time study using one of these worker types.

Each worker type has its own program codes and its own corresponding cost pool. A cost pool is a collection of the salary and benefit costs for all of the workers in that pool.

To cross-over and use program codes from other worker types, see Using Program Codes from other Worker Types on page 50.

Job Title - Enter the worker's job title or classification.

Full-Time - This selection is displayed at the top of the worker's printable time study, but serves no other purpose.

Supervisor/Manager - Supervisor and manager permissions are automatically assigned to any worker who has subordinates.

NORMAL WORK WEEK

This section is customized to match the county's payroll. In this example the payroll is every two-weeks beginning on Sunday and the worker is using a 9/80 schedule.

For the worker's convenience, this information is used to pre-fill the *hours paid* line at the top of each worker's time study screen. The pre-filled amounts can be edited later by the worker when entering their time for each day.

Recommendation: Workers with variable schedules must review and edit the pre-filled entry for each day. For full-time workers with flexible schedules we suggest setting them up with 8 hours on Monday through Friday.

Normal Work Week		
	Week 1	Week 2
Sun		
Mon		9.00
Tue	9.00	9.00
Wed	9.00	9.00
Thu	9.00	9.00
Fri	9.00	8.00
Sat		
	36.00	44.00
Grand Total		80.00

PRIOR TIME STUDY

Use this section to enter the program codes from a worker's prior time study.

There's no limit to the number of program codes assigned to a worker. Additional entry rows are added automatically when needed.

Prior Time Study	
Code	Hours
5134	2.00
1482	0.00
0371	1.00
1431	5.00
1456	1.00
Total	9.00

UNIT DAILY SCHEDULE

Based on the unit selected, a calculation is automatically made and this section is pre-filled with the top 5 codes currently in use by that unit.

This is a good starting point for new hires. The pre-filled entries may be edited as needed, either now or later via their *daily schedule*.

There's no limit to the number of program codes assigned to a worker. Additional entry rows are added automatically when needed.

Unit Daily Schedule	
Code	Hours
5134	3.75
1482	1.25
0371	1.00
1431	1.00
1456	1.00

GOLD MENU BAR



Administrators see a gold menu bar at the top of the main screen. For supervisors the menu bar is green, and blue for workers.

HELP MENU

User Guides

[Worker's User Guide](#)
Covers logging into your account, filling out your time study, and electronically signing your time study.

[Supervisor's User Guide](#)
How to manage and approve your worker's time studies.

[Administrator's User Guide](#)
In depth guide for administrating the Time Study Buddy. Covers managing your county's time studies, running reports, sending bulk emails, and more.

More Help

- [Report a Problem](#)
- [Leave Feedback](#)
- [Help Videos](#)
- [Reset Your Cookies](#)

User Guides - Separate guides are available for workers, supervisors, and *administrators* as downloadable PDF documents.

Report a Problem - Report a problem in an email to the county's *fiscal contact* and to Time Study Buddy support staff and programmers.

Leave Feedback - Send *comments* in an email to the county's *fiscal contact* and to Time Study Buddy support staff.

Help Videos - These are now old and have not been updated because we are now doing User Guides instead. However, some workers still find them useful and perhaps entertaining.

Reset your Cookies - Reset your Time Study Buddy **cookie** located on your PC. The cookie stores login information (to make it easy to login) and keeps track of your progress, so that when you log back in you are taken to exactly to where you left off.

Note: When workers change PCs, or more than one worker is using the same PC, the cookie can get confused and odd login problems may occur. Resetting the cookie fixes this.

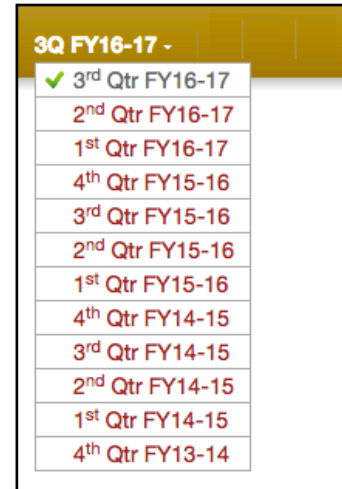
QUARTER MENU

This menu shows the fiscal quarter/year you are working in. To open and work with another quarter/year, select from the drop-down list.

The county has access to the most recent 3 years. If more time is needed contact Time Study Buddy staff. Our policy is to save our data for 7 years.

See New Quarter Setup on page 48.

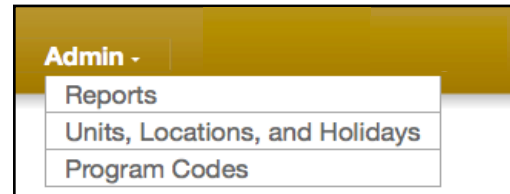
Important: All of the activity for each quarter is maintained within that quarter's shell. It is necessary to be in the proper quarter when managing time studies.



ADMIN MENU

This menu contains a list of sub-menus:

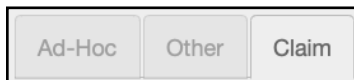
- Reports
- Units, Locations and Holidays
- Program Codes



REPORTS

Select **REPORTS** from the Admin Menu drop-down list.

All reports are created in Excel and may be easily modified if the standard report doesn't exactly meet your needs.



At the top of the reports screen there are three selection tabs: Ad-Hoc, Other, and Claim. Click on the [Claim Tab](#) to view the CEC Reports.

CLAIM REPORTS

The screenshot shows a web interface for generating reports. At the top, there are three tabs: 'Ad-Hoc', 'Daily', and 'Claim'. Below the tabs, a status bar displays 'Batch #110345 generated on 1/27/2017 12:01 PM by Rachel R Brannon (Final)'. To the right of this text is a dropdown menu currently set to 'Final', with a red arrow pointing to it. Below the status bar, the section is titled 'Download Standard Reports'. It is divided into three categories: 'Time Study Codes:', 'FTEs:', and 'Other:'. Each category lists several report types, each with a green 'Download' button. A 'Close' button is located at the bottom right of the interface.

Category	Report Name	Action
Time Study Codes:	Input (DFA 55 etc.)	Download
	Detail	Download
	Audit Trail by Code	Download
	Supervisor Calculations (manage)	Download
	Convert Continuous to Mid-Month	Download
FTEs:	FTE Input (DFA 403)	Download
	FTE Audit Trail	Download
Other:	Time Study List	Download
	Shift Report	Download
	Electronic Time Studies	Download
	Billing Report	Download
	Comments	Download

The Claim Reports are based on a batch containing a copy of the database at the point-in-time the batch was created, and are used to prepare the quarterly County Expense Claim. Each batch is numbered and displayed at the bottom of every Claim Report.

When all of the time studies are complete and you're ready to complete the CEC, run a new batch and mark it as *final*.

This is just an indicator that can be turned on or off at any time.

Important: Run all of the CEC Reports from the same batch to ensure that all of the data is in-sync. If there's an audit of the CEC in the future, run all of the reports given to the auditors from that same batch.

Adjusted (Amended) CECs - To use the Time Study Buddy for time study changes related to an Adjusted CEC, the time studies must first be unlocked. Either an *administrator* or the worker's supervisor can unlock their time study. The worker would make the necessary changes and then re-sign. The supervisor would then re-approve. When the changes are completed a new batch would be run and used for the Adjusted CEC.

The Claim Reports include:

Input (DFA 55 Etc.) - This report is formatted to match the input screens of the FoxPro CEC, and includes the input data for caseworkers, support staff, staff development. and EDP staff.

Detail - This report provides a detail of all completed time studies, and is formatted similar to the Ad-Hoc Reports (page 32) with workers in rows and codes in columns.

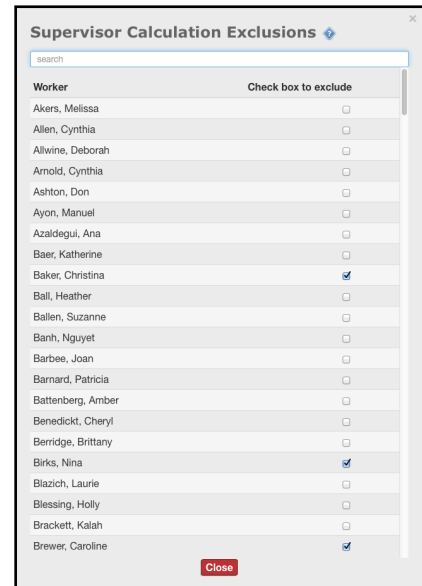
Audit Trail by Code - This report provides the details needed to trace the hours on the Input Report (DFA 55 Etc.) to specific workers and their time studies.

Supervisor Calculations - For each supervisor this report shows the detailed calculation of how their supervision hours were distributed to program codes.

Supervisor Calculations (manage)



Click the **MANAGE** button to exclude certain workers from their supervisor’s automatic calculation. From the pop-up list, checking the box would omit that worker from the calculation of their supervisor’s supervision time. For example, this could be used when a support staff worker has a caseworker supervisor.



Convert Continuous to Mid-Month - For reporting purposes the hours of workers who time study *continuously* are converted into a *mid-month* equivalent. This report shows the detailed calculations for each worker.

A special Ad-Hoc Report is available to show the monthly detail for each worker, unconverted, for all 3 months in the quarter, and commonly used for CalWIN, C4, and grant claims. See the Special Report on page 33.

FTE Input (DFA 403) and FTE Audit Trail - This report is formatted to match the input screens of the FoxPro CEC.

The FTE Audit Trail Report shows the details of the automatic FTE calculations. If a worker's total *hours paid* are more than 80% of the median average *hours paid*, they are determined to be full-time. Otherwise they are part-time.

If a worker uses program codes outside of those assigned to their worker type the FTE is automatically divided between the worker types in 1/10 FTE increments.

The FTEs reported on the CEC have no effect on the funding calculations therein. However, they are used for statistical and budgeting purposes by the State, and perhaps the county. The Time Study Buddy calculates FTEs consistently and accurately.

Time Study List - This report displays textual data and statuses for each worker, including all of the account information. It also includes:

- Time study status (i.e. 93% complete),
- Payroll verification status,
- Dates electronically signed and approved,
- Number of subordinates.

Important: The county should develop a process each quarter to match worker types used in the Time Study Buddy (and displayed in the Time Study List Report) to the worker salaries and benefits included in the expenditure cost pools.

Shift Report - This report shows workers who have used program codes belonging to a different worker type. It is useful for:

- Calculating the corresponding salary and benefit cost pool shifts,
- Identifying workers assigned to an incorrect worker type, and
- Identifying workers using incorrect program codes.

Electronic Time Studies - This report includes viewable and printable time studies showing the electronic signatures imprinted at the bottom. It contains all of the time studies, one on each sheet (tab) of the workbook. It only includes time studies that have been 100% completed by the worker. See page 2 for an example.

Note: Unlike other Excel based reports, the cells in time studies are locked and cannot be edited.

Billing Report - This report determines the number of workers using the Time Study Buddy, and is provided as backup to the Quarterly Invoice sent to the county. See Quarterly Invoices on page 49 for more info.

Comments - This report shows a list of the *administrator* comments made during the quarter. See Comments and Flags on page 19 for an example.

AD-HOC REPORTS

All Ad-Hoc Reports follow the format of workers listed in rows and program codes in columns, and are used to create a customized report in Excel.

Each report includes automatic *supervisor calculations* and automatic *continuous to mid-month conversions*.

	A	B	C	D
1	Code	2151	5134	6151
2	Group	Eligibility	Children	CalWORKs
3	Area	Medi-Cal	CWS	Eligibility
4	Alexander, Samantha	12.75	0.00	0.00
5	Barnes, Carmin	0.00	104.00	0.00
6	Boots, Glenda	0.00	0.00	122.25
7	Dillon, Shirley	0.00	0.00	105.50
8	Bowman, Grenadine	67.00	0.00	0.00
9	Broughton, Audrey	78.00	0.00	0.00

There are a number of options to extract the data in various useful formats.

Source Options - Choose between:

- Completed time studies
- Only completed “done days”
- Projected from daily schedule

This source uses completed days and the worker’s daily schedule to project for incomplete days.

Sheet Options - You can have one giant worksheet, or break it up into multiple sheets (tabs).

Output Options

Include Code Name - Includes the full name of the program code on the worksheet. This can be helpful!

Show Columns - Select additional columns to display on the report.

Filter by Staff - Select the workers you want to appear in the report. There’s an option to select individual workers if desired.

Filter by Program - Select the program codes you want to appear in the report. There’s an option to select individual program codes if desired.

Special Report - There's a Monthly Detail Report for those who *continuously* time study:

Select:

Sheet Option - One sheet per month (CalWIN)

Filter by Staff - Limit to continuous

Filter by Staff:
<input type="radio"/> Include all staff members
<input checked="" type="radio"/> Limit to continuous

<input checked="" type="radio"/> One sheet per month (CalWIN)
Output Options:
<input type="checkbox"/> Include code name
<input checked="" type="checkbox"/> Show continuous workers unconverted
<input checked="" type="checkbox"/> Show super code unconverted

This will generate a report, one sheet (tab) for each month in the quarter and will show the actual time study hours for those who *continuously* time study (i.e. the hours are not converted to a *mid-month* equivalent).

Note: Unlike other reports, automatic *supervisor calculations* are not performed and included in the Monthly Detail Report for technical reasons.

OTHER REPORTS

Daily Schedule

Shows for each worker the program codes and the daily hours assigned.

Note: The daily hours are assigned to each worker automatically based on their previous quarter's actual time study.

Quarterly Comparison

Worker	Employee Id	Unit	Supervisor	Status	Quarterly Comparison
Aguilar, Mary	105219	Eligibility C-4	Page, Theresa	e-approved	91.25%
Booker, Garrett	101913	Aging G	Garza, Clay	e-approved	100.00%
Carter, Melinda	103433	Children Adoptions	Loftin, Ellen	e-approved	75.58%

Calculates the change from the previous quarter's time study. This change is expressed as the quarterly comparison percent. This report includes a detailed sheet (tab) for each worker.

Database Dump

Shows for each worker all of the time study data, in a table format for easy upload to an outside database. This report is updated in real time and can serve as a tool to access your data in other formats, as well as a backup to reconstruct time studies if needed.

Name	Employee Id	Date	Program Code	Hours	Verification
Aaronson, Linda	105266	2/4/2020	3431	4.00	Verified
Aaronson, Linda	105266	2/4/2020	6151	4.00	Verified
Aaronson, Linda	105266	2/5/2020	2153	2.00	Verified
Aaronson, Linda	105266	2/5/2020	3431	6.00	Verified
Aaronson, Linda	105266	2/6/2020	3431	8.00	Verified

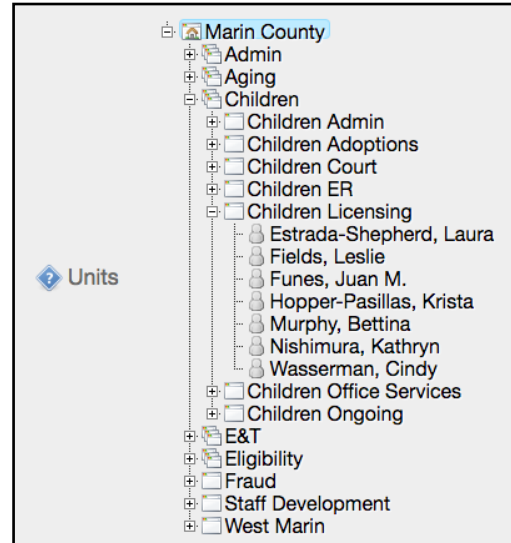
UNITS, LOCATIONS AND HOLIDAYS

Units

This is where units are setup. For detailed instructions place your mouse on the blue **QUESTION MARK**.

A unit typically contains several workers and one supervisor. Several units may be combined into a *unit group*, representing a division, section, etc., and can be useful for running reports for managers.

For large organizations *unit groups* can be nested into other *unit groups* providing an unlimited number of levels, creating in essence an organization chart.



Add Location

Locations

- 120 N Redwood [rename](#)
- 1600 Los Gamos [rename](#)
- 371 BMK [rename](#)
- 75 Rowland [rename](#)
- 920 Grand [rename](#)
- Bldg. 1010 [rename](#)
- Bldg. 1020 [rename](#)
- Campus [rename](#)
- Detention Medical [rename](#)
- West Marin [rename](#)

Locations

This is where locations are setup, and are displayed on the worker's printable time study.

Holidays

This is where holidays are setup. On each worker's time study, the hours normally worked on a holiday are automatically re-assigned to non-allocable. They can edit this automatic entry if needed.

Click on the **MANAGE 2019 HOLIDAYS** button to setup holidays for the next year.

Add Holiday

2018 Holidays

[Manage 2019 Holidays](#)

- New Years Eve (1/1/2018) [remove](#)
- New Years Day (1/2/2018) [remove](#)
- Martin Luther King Jr. Day (1/15/2018) [remove](#)
- President's Day (2/19/2018) [remove](#)
- Memorial Day (5/28/2018) [remove](#)
- Fourth of July (7/4/2018) [remove](#)
- Labor Day (9/3/2018) [remove](#)
- Columbus Day (10/8/2018) [remove](#)
- Veteran's Day (11/12/2018) [remove](#)
- Thanksgiving (11/22/2018) [remove](#)
- Day after Thanksgiving (11/23/2018) [remove](#)
- Christmas Eve (12/24/2018) [remove](#)
- Christmas Day (12/25/2018) [remove](#)
- New Years Eve (12/31/2018) [remove](#)

Fiscal Contact

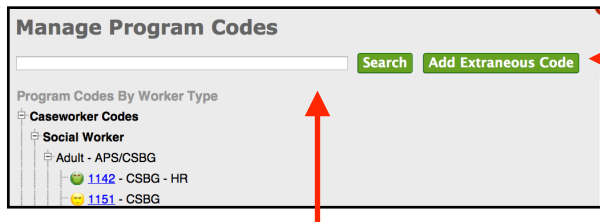
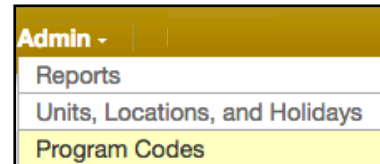
Located at the bottom of the Units, Locations and Holidays Menu, the *fiscal contact* is an *administrator* who manages the time study process for the county. To change the *fiscal contact*, select from the drop-down list and click **UPDATE FISCAL CONTACT**. The list contains all workers with *administrator* permissions.



The Time Study Buddy sends out many emails automatically, and the *fiscal contact* is shown as the sender on those emails. A copy of these emails is stored on each worker's email log. See Email Log on page 17.

PROGRAM CODES

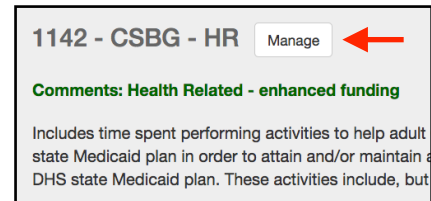
This is where you manage the program codes. Over 1,000 standard codes have been setup. Time Study Buddy staff add new program codes when available.



Click on the **ADD EXTRANEIOUS CODE** button to setup your own internal program codes. These are typically used for grants and other programs. There is no limit to the number of codes that can be added. See Extraneous Groups on page 57.

You can find a specific code by using the Search Box or by browsing the tree structure.

To manage a code, first click on the **code number or name** (for example: 1142), then click the **MANAGE** button.

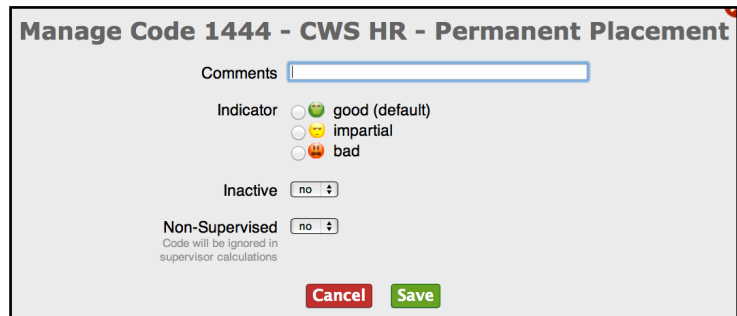


Comments - A comment may be added to any program code. They appear at the top of the official code description, and may be used to provide examples and clarifications.

Fiscal Indicators - The *fiscal indicators*, also known as the happy faces may be changed if desired.

Inactive - A code may be marked Inactive to make it unavailable for workers to use.

Non-Supervised - A code may be marked non-supervised and is omitted from *supervisor calculations*. Typically, this is used for *extraneous codes*.



ACCOUNT MENU

Here you can **CHANGE YOUR PASSWORD** or **LOGOUT**. It is not necessary to logout, and doing so takes you to the home page. To log back in from the home page click the **LOGIN** button and enter your email address and password.

Account -
Welcome Pam Wood
Change your Password
Logout

MAA/TCM - DIFFERENCES ADMINISTRATION

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MAIN ADMIN SCREEN MENUS

Claiming Unit Menu:

This menu contains a list of Claiming Units. To add or remove Claiming Units please contact us.

Claiming Units can be a department or section within a county, and/or a city or CBO organization. For that reason, there is no crossover or connection of data between Claiming Units (with one exception, see below). Each is completely independent. For example, holidays must be setup in each.

Exception: Supervisors within an organization with several Claiming Units may **supervise** any worker, even if the worker is in a different Claiming Unit.

Claiming Unit -
Breast and Cervical Cancer Services
Community Programs
✓ DPH Central Admin
HUH Support Services Team
Newcomers Health Program
SFGH Administration and Outpatient
Tuberculosis Clinic

ACCOUNT INFORMATION

Permissions:

LGA Admin - This permission is used to assign administrator access at the Claiming Unit level for one or more Claiming Units.

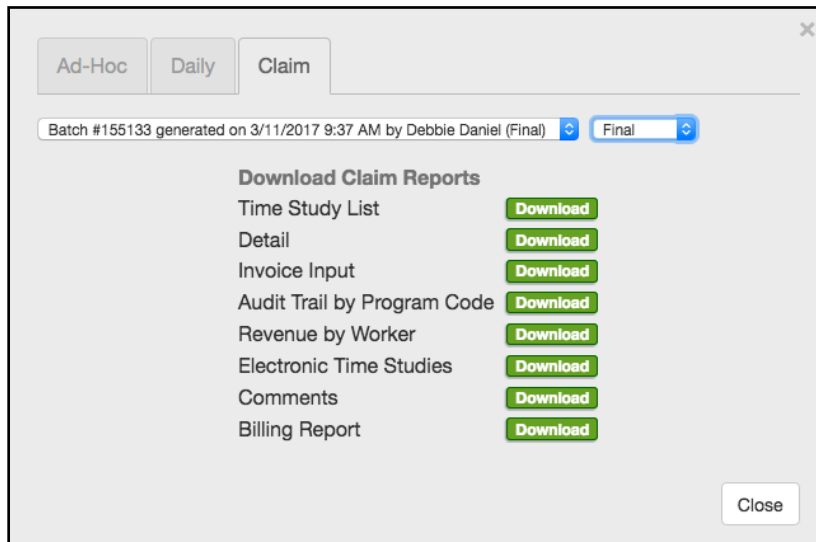
Permissions	Lga Admin
Admin For	<ul style="list-style-type: none">× ADT - Alcohol Drug & Tobacco× CHI - Children's Health Initiative× Public Health

Continued on the next page

MENTAL HEALTH MAA

In addition to County MAA (CMAA), Time Study Buddy is optimized for MH MAA, including special reports and using 1-minute increments for time study entries.

CLAIM REPORTS



The Claim Reports are based on a batch containing a copy of the database at the point-in-time the batch was created, and are used to prepare the quarterly MAA Invoice. Each batch is numbered and displayed at the bottom of every Claim Report.

When all of the time studies are complete and you're ready to complete the MAA Invoice, run a new batch and mark it as *final*.

This is just an indicator that can be turned on or off at any time.

Important: Run all of the MAA Invoice Reports from the same batch to ensure that all of the data is in-sync. If there's an audit of the MAA Invoice in the future, run all of the reports given to the auditors from that same batch.

Continued on the next page

The Claim Reports include:

Time Study List - This report displays textual data and statuses for each worker, including all of the account information. It also includes:

- Time study status (i.e. 93% complete),
- Payroll verification status,
- Dates electronically signed and approved,
- Number of subordinates.

Detail - This report provides a detail of all completed time studies, and is formatted similar to the Ad-Hoc Reports (page 32) with workers in rows and codes in columns.

Invoice Input - This report is formatted to match the input screen of the MAA Invoice, and includes the input data for SPMP and Non-SPMP Hours.

Audit Trail by Program Code - This report provides the details needed to trace the hours on the Invoice Input Report to specific workers and their time studies.

Revenue by Worker - This report provides the federal revenue percentage generated for each worker, including summary and detail tabs.

Electronic Time Studies - This report includes viewable and printable time studies showing the electronic signatures imprinted at the bottom. It contains all of the time studies, one on each sheet (tab) of the workbook. It only includes time studies that have been 100% completed by the worker. See page 2 for an example.

Note: All of the cells in the Electronic Time Studies Report are locked and cannot be edited.

Code	Description	SPMP Hours	Non-SPMP Hours
1	Other Programs/Activities	972.75	981.75
2	Direct Patient Care	777.75	
3	Outreach to Non Medi-Cal Programs	8.50	65.00
4	Medi-Cal Outreach	78.75	79.50
5	Referral, Coordination, and Monitoring of Non	6.75	44.50
6	Referral, Coordination, and Monitoring of Med	320.75	392.00
7	Facilitating Non Medi-Cal Application		5.00
8	Facilitating Medi-Cal Application	13.25	8.75
9	Arranging and/or providing Non-Emergency, H		
10	Arranging and/or providing Non-Emergency, H		6.50
11	Contract Administration for Non Medi-Cal Serv		10.75
12	Contract Administration (A) for Medi-Cal Serv		
13	Contract Administration (B) for Medi-Cal Serv	6.75	74.00
14	Program Planning and Policy Development for	31.00	393.00
15	Program Planning and Policy Development (A)		151.25
16	Program Planning and Policy Development Ski	93.50	Not allowed
17	Program Planning and Policy Development (B)		636.00
18	Program Planning and Policy Development (Sf	488.50	Not allowed
19	MAA/TCM Coordination and Claims Administra		
20	MAA/TCM Implementation Training	3.00	4.75
21	General Administration	543.50	852.00
22	Paid Time Off	1,002.00	1,129.75
23	Non-Targeted Case Management		
24	Providing Targeted case Management (TCM)		
25	TCM Encounter Related Activities		
26	Travel related to providing TCM		
27	Supervision of Case Managers		
28	Encounter Entry into TCM On-Line System		
29	TCM Data Systems and Claiming Coordination		
30	TCM Quality Assurance/Performance Monitorin		
31	TCM Subcontract Administration		
32	TCM Program Planning and Policy Developmer		
Total		4,346.75	4,834.50

Employee Name	Unit	Hours	Hours Reimbursed	Revenue Percent
Barsotti, Carme	Health	390.00	40.69	10.43%
Beauchamp, Maryellen	Health	520.00	254.44	48.93%
Blake, Jill	Admin	520.00	110.38	21.23%
Bradley, Devin	Admin	520.00	27.13	5.22%
Cambra, Patty	Admin	416.00	71.25	17.13%
Cross, Cathy	Admin	520.00	105.38	20.26%
Giammona, Rebecca	Health	392.00	43.88	11.19%
Glaz, Shannon	Admin	520.00	17.50	3.37%
Graves, Dawn	Admin	520.50	148.38	28.51%
Hughes, Jennifer	Health	520.00	168.00	32.31%
Key, Cindy	Health	520.00	150.00	28.85%
Kirby-Rost, Rachel	Health	56.00	13.88	24.78%
Martin, Kathlee	Health	420.50	108.38	25.77%
Matson, Liz	Admin	518.00	77.38	14.94%
Pierson, Debra	Admin	520.00	96.63	18.58%
Richardson, Lisa	Admin	520.00	59.88	11.51%
Sweet, Jamie	Admin	118.50	16.75	14.14%
Vega, Jonte	Health	112.00	14.44	12.89%
Weiss-Wenzl, Charlene	Health	520.00	156.38	30.07%
Whittaker, Holly	Health	520.00	32.25	6.20%
Wilson, Cynthia	Health	520.00	116.44	22.39%
Total		9,183.50	1,829.38	19.92%

Billing Report - This report determines the number of workers using the Time Study Buddy, and is provided as backup to the Quarterly Invoice sent to the county. See Quarterly Invoices on page 49.

Comments - This report shows a list of the *administrator* comments made during the quarter. See Comments and Flags on page 19.

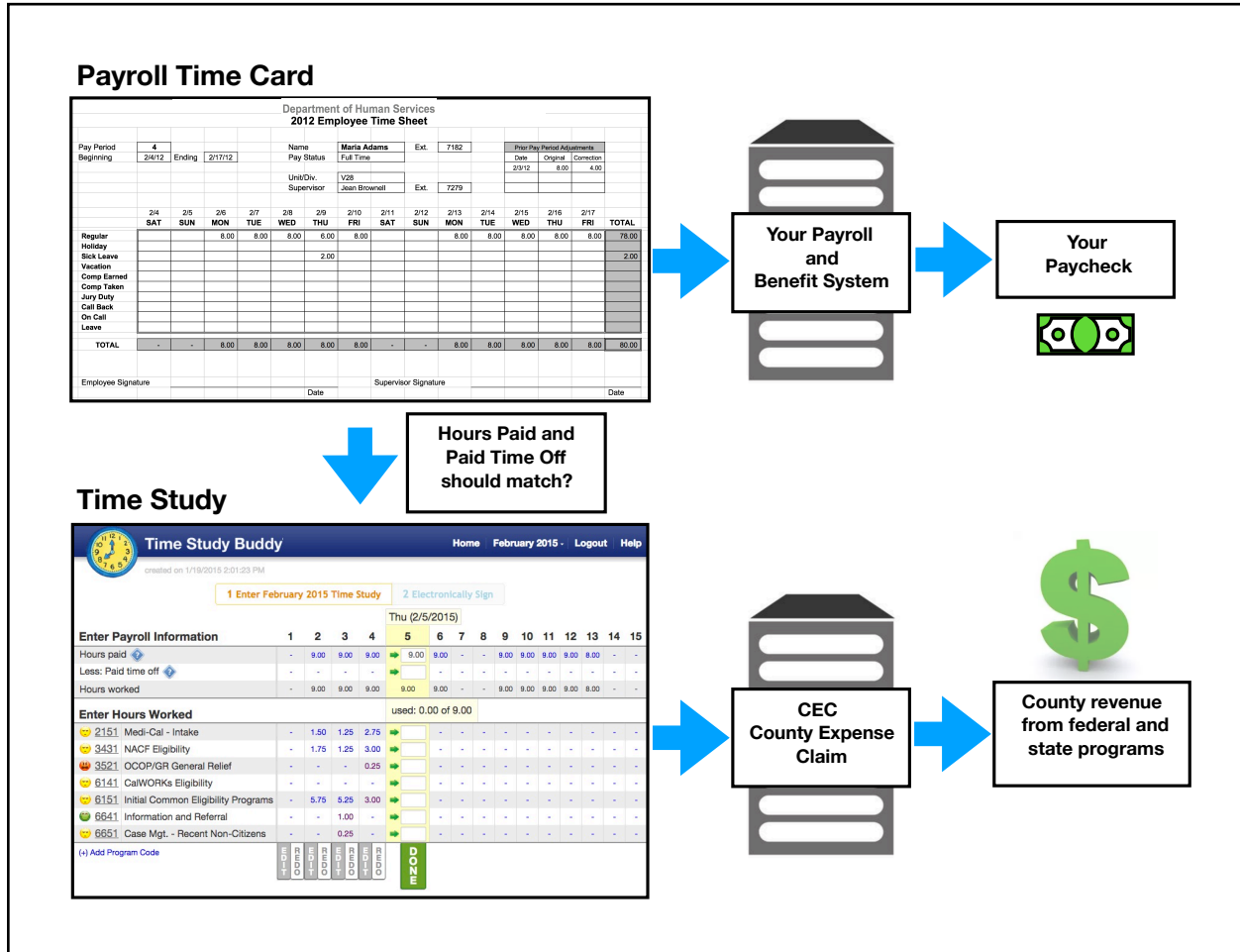
PAYROLL INTEGRATION OPTIONS

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42	Payroll Verification
43	Full Payroll Upload
43	CECRIS - County Expense Claim Reporting Information System

PAYROLL INTEGRATION OPTIONS

The chart below displays the differences between a time study system and a payroll time card system. While they both keep track of time, they do so for entirely different purposes.



Payroll Verification

The Time Study Buddy can verify the following data from the County's payroll time card system:

- Total Hours Paid
- Paid Time Off

This can be done via an upload of your County's payroll data, or manually. See Verification to Payroll Time Records on page 19.

Full Payroll Upload

For Counties that are currently using their payroll time card system for times studies, we can upload all of the payroll data into the Time Study Buddy. The advantages of doing this are:

The time studies, if incorrect, can be edited independent of payroll.

Provides a printable time study using the State's official format including electronic signatures, and meeting all State requirements.

Provides full access to our extensive management reports designed to assist in maximizing revenue.

Automatically performs all post time study processing, including reports designed for easy entry into the claim.

When available via CECRIS, we will accommodate the automatic electronic uploading of time study data to the claim.

CECRIS - County Expense Claim Reporting Information System

We are following the progress of CECRIS and will be fully compliant when released. This will include a crosswalk to match the old and the new time study code identifiers.

A concern is that CECRIS may not be programmed to provide useful time study reports. However, for counties using Time Study Buddy that should not be a problem. Our extensive management reports designed to assist in maximizing revenue will continue to be available.

MOBILE DEVICE APP

Mobile Device App

After a worker has setup their account, an iOS App (iPhone and iPad) can be downloaded from the Apple Store to make daily time study entries. An Android App will be available in the future.

Time study data entered on the App is automatically synchronized with the time study data on the worker's desktop computer.



SPECIAL SITUATIONS

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SPECIAL SITUATIONS - GENERAL

Multiple Worker Accounts

It is possible for any worker to have multiple accounts. Each account is identified by using the combination of the email address + password. Because a worker typically has just one county email address, the password for each account must be unique to create a unique combination.

Recommendation: Having multiple accounts can be confusing. We suggest using them only as a last resort.

Removing Duplicate Accounts

It is possible to accidentally setup duplicate accounts for a worker. To remove them: 1) change the worker's name to something obscure so that it doesn't appear in searches, and 2) set the *end date* to the day before the *start date*.

Transfers During the Time Study Period

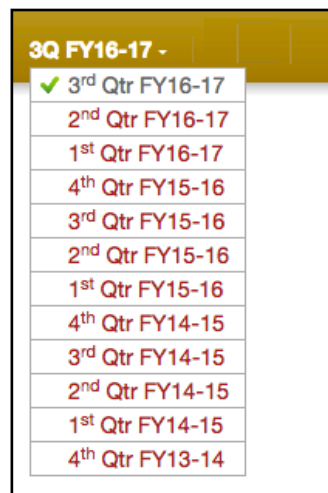
A worker may transfer to another unit and/or supervisor during the middle of a time study period. Darn it! In this situation we recommend you update the worker's unit and supervisor in the current quarter, and add additional program codes if needed. The new supervisor reviews and approves the entire time study. Any unused program codes should be inactivated in the next quarter.

New Quarter Setup

To allow counties to add, remove, or edit worker accounts before each new quarter begins, a new quarter is automatically created in the Time Study Buddy one month before the quarter starts. As an example, the quarter beginning on January 1 (new quarter) is setup in advance on the preceding December 1.

The new quarter starts with a copy of the old quarter. However, the old quarter is not yet complete. Time studies will continue to be active in the old quarter, including changes to worker accounts (such as transfers to a different unit, supervisor, etc.). These changes to the old quarter will automatically carry forward to the new quarter.

However, this does not happen in reverse. Changes to worker accounts in the new quarter have no effect on the old quarter.



3Q FY16-17 -
✓ 3 rd Qtr FY16-17
2 nd Qtr FY16-17
1 st Qtr FY16-17
4 th Qtr FY15-16
3 rd Qtr FY15-16
2 nd Qtr FY15-16
1 st Qtr FY15-16
4 th Qtr FY14-15
3 rd Qtr FY14-15
2 nd Qtr FY14-15
1 st Qtr FY14-15
4 th Qtr FY13-14

Important: For counties using the 28 day pay period method (instead of the full calendar month), review the new quarter setup before it begins, and contact Time Study Buddy staff if changes are needed. Our default method is to setup the time study period using the two 14-day pay periods with the most calendar days in the middle month, and in the event of a tie the later pay periods are used.

Data Backups

The Time Study Buddy maintains real-time backups to N+1 redundant servers and hard drives, and daily backups at two off-site locations.

Also, your data is easily accessible on the website for 12 quarters (3 years). If you need to go back farther just let us know. We maintain your data for 7 years.

For Internal County Backups

The Database Dump Report contains all of the information needed to reconstruct all of the county's time studies during the quarter. You can run this reports at any time.

Reports Menu > Other Tab > Database Dump Report

Recommendation: After the time studies are complete we recommend that you run all of the Claim Reports from the *final batch* and save them in a folder, along with your other CEC documentation.

Quarterly Invoices

During the middle of each quarter we prepare your invoice using an automated process based on county usage at that time. You are charged for all workers with active time studies as well as anyone with *administrator* or reports permissions, and anyone who approves a time study. A detailed Billing Report (see page 31) is provided as backup.

Recommendation: At the beginning of each quarter clean up any unused accounts for those who do not time study, and limit *administrator* and reports permissions.

SPECIAL SITUATIONS - HUMAN AND SOCIAL SERVICES

Worker Types and Cost Pools

Each worker is assigned to one of the 9 available worker types. Each worker type has its own cost pool, and the salary and benefit cost for each worker is accumulated in the cost pools. This is done by the county outside of the Time Study Buddy.

Important: The county should develop a process each quarter to match worker types used in the Time Study Buddy (and displayed in the Claim > Time Study List Report) to the worker salaries and benefits included in the cost pools.

Using Program Codes from Other Worker Types

Each of the 9 worker types has its own program codes. Workers can only add program codes to their time study for their own worker type. However, an *administrator* can add any of the over 1,000 program codes to any worker's time study.

A special report was developed to identify when a worker uses codes from another worker type. See Shift Report on page 31.

SPECIAL SITUATIONS - MAA/TCM

5, 10, or 20 Work Day Option

Claiming Units with over 100 workers have the option of time studying for 20 work days during the quarter. If over 200 workers for 10 work days, and if over 400 workers for just 5 work days. In addition to a time study each worker is required to complete secondary documentation.

The Time Study Buddy accommodates the various work day options, and the selection is usually made during the initial Claiming Unit setup. Subsequently you can switch back and forth between perpetual time studies and/or between one of the work day options.

Secondary Documentation

When completing their time study entry for each day, the worker has an option to type in a **who, what, where** description for each federally funded program code. These descriptions are printed and electronically signed as a second page to the time study.

See page 55 for details.

Note: Secondary documentation is only available to Claiming Units using one of the 5, 10, or 20 work day options.

COUNTY OPTIONS

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58	Time Card for Payroll

COUNTY OPTIONS

These options are available to all counties and there is no extra charge to implement them. Please contact Time Study Buddy staff if interested.

Time Study Guidance

With this option the worker's time study entries from the previous quarter are available as a guide to assist them with their current entries.

Some workers wait until the end of the month to do their time study, sometimes randomly guessing to disguise the fact that they have not done daily entries. This can result in inaccurate and inconsistent results, with an adverse fiscal effect.

This option assists them in making more accurate and consistent time study entries, even if they are waiting until the end of the month to prepare their time study.

Delay Supervisor Approvals



With this option, the [Pending Approval](#) status icon is displayed after the worker signs their time study.

The notification to supervisors to electronically approve completed time studies is delayed until after they have been verified to match the payroll time records.

This reduces supervisor time and potential confusion from needing to re-approve time studies that need correction.

Password Security

A unique worker password is required to meet the electronic signature standards. To make passwords more secure, the County may apply a variety of password restrictions, such as a minimum length, or requiring special characters.

Also, the Time Study Buddy password can be synchronized with the worker's existing county-wide password using Single Sign-On technology.

Pay Periods

The Time Study Buddy works with a variety of pay periods, including:

- Weekly
- Every two weeks
- Twice a month
- Monthly

See Payroll Integration on page 42.

Rounding Increments

Although most time studies require time to be recorded in 15-minute intervals (.25 hour), we also support the following intervals:

- 1 minute
- 5 minutes
- 6 minutes
- 10 minutes
- 30 minutes
- 60 minutes

Mental Health MAA now requires time to be recorded in 1-minute intervals.

Clock In and Clock Out

We accommodate clock in and clock out times for each day if needed.

Secondary Documentation

To add secondary documentation for a specific code, go to the Manage Code Screen located at: [ADMIN](#) menu > [PROGRAM CODES](#) > select a [specific code](#) > click the [MANAGE](#) button.

Secondary Doc Type

From the Manage Code Screen select one of four options for Secondary Doc Type.

Secondary Doc Type	Secondary documentation is always optional
No secondary documentation is used	
Secondary documentation is always optional	
Secondary documentation is always required	
Secondary documentation is required twice per time study	

Instructions for Workers

Here you can customize the instructions the worker will see.

Instructions for Workers
Describe what you did, who for, and where this service

Triangles

On the worker's time study screen, after clicking the [DONE](#) button for the day, a [blue triangle](#) appears in the corner to indicate that documentation is available.

Time Study Buddy
created on 12/21/2018 3:21:00 PM

Enter Payroll Information	1	2
Hours paid	8.00	8.00
Less: Paid time off	8.00	-
Hours worked	-	8.00

Enter Hours Worked

123 Test Code	Test Code for Test Group	-	8.00
---------------	--------------------------	---	------


(+) Add Program Code

EDIT REMOVE EDIT REMOVE

Enter Documentation

Clicking the **blue triangle** displays a popup window with a text box for the worker's documentation.

Add Secondary Documentation


Code  123 Test Code - Test Code for Test Group

Date Wednesday, Jan 2

Hours 8.00

Describe what you did, who for, and where this service was performed.

I was picking up a client to drive to the clinic.





After clicking **SAVE**, the triangle changes color from blue to green. Clicking on the **green triangle** brings back the popup, to be viewed and/or edited.

Secondary Documentation Reports

When the worker's time study has been completed and is ready for electronic signature, both the time study and the secondary documentation are electronically signed and approved.

Two claim reports are available:

Electronic Time Studies Report

A second page is added to the worker's time study, including electronic signatures and approvals.

SECONDARY DOCUMENTATION WORKSHEET		NAME:
ACTIVITY DESCRIPTIONS		AAA, Test Worker
CODE	DOCUMENTATION	
23 Test Cod	I was picking up a client to drive her to the clinic.	
EMPLOYEE:	I certify that this is a true and accurate report of my time and the activities were performed as shown in accordance with program requirements	
	Electronically signed by Dan Gardner for Test Worker AAA on 12/19/2018	
	Employee's Signature	Date

Secondary Documentation Report - This report shows all of the documentation entries for all workers in list format.

	A	B	C	D	E	F
1	Worker Name	Employee Id	Code	Date	Hours	Documentation
2	AAA, Test Worker		123 Test Code	12/7/2018	8.00	I was picking up a client to drive her to the clinic.
3						
4						
	AAA, Test Worker - 1	AAA, Test Worker - 1D	Aguayo, Aurora - 1	Baulwin, Crystal - 1	Beverly, Catrina - 1	Bokelman, Carol - 1 Boyle, Teresa - 1

Extraneous Groups

We use the term *extraneous* to identify a custom county program code. These codes can be grouped together under a variety of custom group names. This can be useful when adding several program codes that are all related to a single program, such as MCAH or CHDP. To setup a new group, select:

ADMIN Menu > PROGRAM CODES > ADD EXTRANEIOUS CODE

On that screen click on the **drop-down arrow**.

Add an Extraneous Code

Group: Extraneous Codes

Code:

(can be numbers and letters)

Name:

Comments:

Indicator: good impartial bad

From the list that drops down you can create a new group, or rename the existing group.

When running Ad-Hoc Reports, the added groups will appear in the Program Group section, and may be selected individually for reporting purposes.

Ad-Hoc Daily Claim

Source: Completed Time Studies

Sheet Options: All on One Sheet

Output Options: Include Code Name Show Continuous Workers Unconverted Show Super Code Unconverted

Show Columns: Supervisor Unit Unit Group Worker Type Job Title Employee Id Time Study Status

Filter by Staff: Include All Staff Members Limit to Continuous Limit by Unit Limit by Unit Group Limit by Worker Type Limit by Staff Member

Filter by Program: Include All Codes Limit by Program Group Adult CalWORKs Children EDP Eligibility Extraneous Codes Fraud Generic Non-Welfare Staff Development Support Staff Test Group WIA Limit by Program Limit by Program Code

Close Run Report

Allow Workers to Adjust their Normal Work Week

Normal Work Week		
	Week 1	Week 2
Sun	<input type="text"/>	<input type="text"/>
Mon	<input type="text"/>	9.00
Tue	9.00	9.00
Wed	9.00	9.00
Thu	9.00	9.00
Fri	9.00	8.00
Sat	<input type="text"/>	<input type="text"/>
	36.00	44.00
Grand Total		80.00

Normal Work Weeks (page 25) are typically maintained by the county. If you would like your workers to be able to adjust their schedule as well, contact Time Study Buddy staff to implement.

Home April 2020 - Account -

Welcome Dawn Beggs

Change your Password

Update your Normal Work Week

Logout

Time Cards for Payroll

We plan to introduce a Time Cards for Payroll feature to the Time Study Buddy in April 2019.

Currently we just track summarized data for Hours Paid and Paid Time Off.

With this new feature the county would be able to setup an unlimited number of county specific time card codes to capture payroll related data.

Time Study Buddy Home Clock In/Out November 2018 - Account - Help
 created on 2/14/2019 4:00:46 PM Managing Jennie Evins [Back to Admin](#)

1 Enter November 2018 Time Study 2 Electronically Sign 3 Approve

Fri (11/30/2018)

Enter Time Card Information	20	21	22	23	24	25	26	27	28	29	30	1	Total
Regular Pay Hours	3.00	8.00	8.00	8.00	-	-	8.00	8.00	8.00	8.00	8.00	-	160.00
Overtime Pay Hours	-	-	-	-	-	-	-	-	-	-	-	-	0.00
Less: Paid Time Off	-	-	-	-	-	-	-	-	-	-	8.00	-	24.00
Other Codes	-	-	-	-	-	-	-	-	-	-	-	-	0.00
Time Study Hours	3.00	8.00	-	-	-	-	-	-	-	-	8.00	-	136.00

used: 0.00 of 8.00

Enter Hours Worked

2151	Medi-Cal - Intake	-	1.00	-	-	-	-	-	-	-	-	-	10.00
2153	Medi-Cal - Continuing	3.00	7.00	-	-	-	-	-	-	-	-	-	86.25
3431	NACF Eligibility	-	-	-	-	-	-	-	-	-	-	-	22.25
4561	WINS Administration	-	-	-	-	-	-	-	-	-	-	-	0.00
6141	CalWORKs Eligibility	-	-	-	-	-	-	-	-	-	-	-	5.25
6151	Initial Common Eligibility Programs	-	-	-	-	-	-	-	-	-	-	-	4.25

Friday (11/30/2018)

- KCSIC Sick Leave 8.00
- KCVAC Vacation
- KCHOL Holiday Pay
- KCVSL Vacation in Lieu of Sick

Total Less: Paid Time Off 8.00

Buttons: EDIT, DONE

Time Study Buddy Home Buddy - Admin (Marin) - 2Q FY18-19 - Account - Help

2nd Q

Codes Categories

Code	Name	Category	Required	Active
KCREG	Regular Hours	Regular Pay Hours	Required	Active
KCOTP	Overtime Pay	Overtime Pay Hours	Required	Active
KCCMT	Comp Time Taken	Less: Paid Time Off	Required	Active
KCFHP	FMLA Holiday	Less: Paid Time Off	Optional	Active
KCFSE	FMLA Sick - Employee	Less: Paid Time Off	Optional	Active
KCFFS	FMLA Sick - Family	Less: Paid Time Off	Optional	Active
KCFVA	FMLA Vacation	Less: Paid Time Off	Optional	Active
KCHOL	Holiday Pay	Less: Paid Time Off	Required	Active
KCCMW	Comp Time Worked	Other Codes	Required	Active
KCEMR	Emergency Response	Other Codes	Optional	Active

code name Regular Pay Hours Required Active (+) Add

GLOSSARY OF TERMS

ADMINISTRATOR - Someone who has administrative permissions to the Time Study Buddy including access to all worker accounts and all features.

COMMENTS - An *administrator* may add comments and flags to a worker's time study. See page 19.

CONTINUOUS - A worker who times studies during all 3 months of each quarter. Also called *perpetual*.

COUNTY - The majority of Time Study Buddy customers are county governments. Other customers are cities and CBOs (Community Based Organizations). In this guide the term *county* applies to all customers.

DAILY SCHEDULE - This includes the list of program codes that appear on each worker's time study screen. It also includes in the background their actual time study results from the previous quarter, converted to a daily format. See page 16.

END DATE - The date the worker permanently discontinues doing a time study in the Time Study Buddy. See page 24.

EXCLUDE FROM REPORTS - The time study results for these workers are excluded from all reports. On the *main admin screen* and on the Time Study List Report these *excluded* workers are identified using a red shading. See page 17.

EXTRANEOUS - A program code or worker type that is *extraneous* to the quarterly Claim. See Add Extraneous Code on page 35, Add Extraneous Group on page 57, and Worker Type on page 25.

FINAL BATCH - When running Claim Reports, this identifies the batch number that was used to input data into the CEC Claim. See page 29.

FISCAL CONTACT - An *administrator* who manages the time study process for the county. The Time Study Buddy sends out many emails automatically, and the *fiscal contact* is shown as the sender on those emails.

FISCAL INDICATORS - These are used to identify program codes with good reimbursement (green), bad (red) and in-between (yellow). See page 35.

FIVE, TEN, or TWENTY WORK DAY - MAA/TCM Claiming Units with over 100 workers have the option of time studying for 20 work days during the quarter, if over 200 workers for 10 work days, and if over 400 workers for just 5 work days. In addition to a time study each worker is required to complete secondary documentation.

HOURS PAID - This includes regular hours paid. Time studies for Human and Social Services typically exclude overtime.

MAIN ADMIN SCREEN - The primary Time Study Buddy screen *administrator's* use to manage and oversee the county's time study process. See page 14.

MID-MONTH - Someone who time studies during the middle month of each quarter. As an alternate they may time study using the 28 days corresponding to the payroll periods that most closely match the middle month.

PAYROLL VERIFICATION - The process of comparing a worker's payroll time records to their time study entries to ensure they match. See pages 19 and 42.

PERPETUAL - A worker who times studies during all 3 months of each quarter. Also called **continuous**.

START DATE - The date the worker begins their time study. It is used to create their initial time study input screens.

SUPERVISOR CALCULATION - The process of converting **supervision code hours** into **program code hours** based on their subordinate's actual program code usage. See page 30.

UNIT GROUP - A group of 2 or more units representing a division, section, etc. See page 34.

WELCOME EMAIL - An email sent to newly added workers including a link for them to login to their account to begin using the Time Study Buddy.



Thank you ... Dan and Brian

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