BOSTON PRIVATE

WEALTH ▫ TRUST ▫ PRIVATE BANKING

Employee Self Service (Pay Statements, Tax Forms, Direct Deposit and more): UltiPro https://e12.ultipro.com/login.aspx	**Username:** Last Name, First Initial of First Name, Last four digits of SSN **Ex:** James Adams 123-45-6789 ***adamsj6789*** **Password:** Date of Birth **Ex:** January 1, 1900 ***01011900***
Time Reporting System: NOVAtimeAnywhere® 4000 SaaS EMPLOYEE WEB SERVICES https://online1.novatimeanywhere.com/nova4000/ewslogin.aspx?cid=1F8BDAEC-7848-4E1A-A2F5-86456FB55C14%20	**Username:** Employee ID (Can be found in UltiPro) **Password:** Select *"Punch"* then follow instructions on employee guide **Note**: Please contact Petruvna Bundu for password resets or system issues
Learning Management System (Compliance and Career Development Courses): BAI LEARNING & DEVELOPMENT http://www.bai.org/learninganddevelopment/logins/custom_login	**Username**: Will be emailed to you on your third day **Password**: Will be emailed to you on your third day **Note**: Please contact Chris Lerner for password resets or BAI test resets
BP Connect (Boston Private's Intranet and Employee Resource Center) BOSTON PRIVATE WEALTH ▫ TRUST ▫ PRIVATE BANKING BP Connect (the Internet homepage)	**Username:** jadams@bostonprivate.com **Password:** The same password you use to log into your computer.

BOSTON PRIVATE
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Welcome to Ultipro!

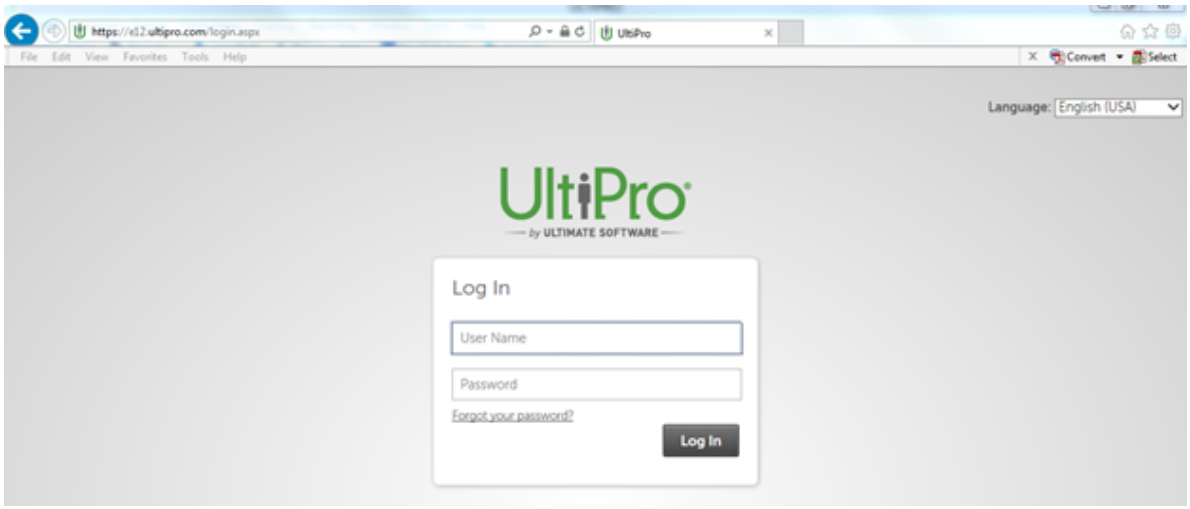
The Ultipro software solution is a complete web-based Human Resources Information System (HRIS) that allows employees to view their pay and benefit deduction details on-line quickly and easily.

How to Log Onto UltiPro

1. Open your internet browser.

2. Type in the URL address: https://E12.UltiPro.com
   Helpful tip: Save the URL address in your Favorites. The URL is also posted on the Human Resources page of BPBconnect.

3. The initial login screen will request a username and password:



4. Username is the last name (up to the first 10 characters), the first initial of the employee's first name and the last four digits of the employee's social security number. Please note that the username is not case sensitive and all apostrophes (') and/or hyphens (-) are included as the first 10 characters of the last name.

   Example: Username for William O'Connor SSN# 123-45-6789
   Username: o'connorw6789

5. Password is set as the employee's date of birth (mmddyyyy)
   Example: Password for 03/23/1971: **03231971**

6. Click Log in. **(Upon login you will be prompted to change your password)**

7. To change your password, retype your current password (date of birth) and create a new password with the following criteria:
   - 6 to 15 characters
   - at least one number
   - at least one uppercase character
   - at least one special character

<u>This will be your new password the next time you log into UltiPro.</u>

5. Once you have created a new password, you will be prompted to select and answer three security questions. If you forget your password you will be prompted to answer these three security questions in order to reset your password.

Once logged in you will be viewing the UltiPro Home Page!

NOVATIME
EMPLOYEE MANUAL

NOVAtime is a time management database system that tracks all work hours and schedule related data in a centralized online location

As an Employee you are able to record time worked, track paid time off usage and availability, and request paid time off.

This Document will walk through How To:

Subject	Page Number
Login	2 – 5
Requesting Time Off	6 – 12
Managing your Timesheet	13 – 17

LOGGING IN AND CHANGING YOUR PASSWORD

LOGGING IN TO NOVATIME FOR THE FIRST TIME

To access NOVAtime, click the following link:
https://online2.novatimeanywhere.com/nova4000/ewslogin.aspx?cid=1F8BDAEC-7848-4E1A-A2F5-86456FB55C14

** For employees that are also supervisors or approvers, note that this link is different from the supervisor login. Your login information as a supervisor or approver will not work for the employee link and your login information as an employee will not work for the supervisor login.*

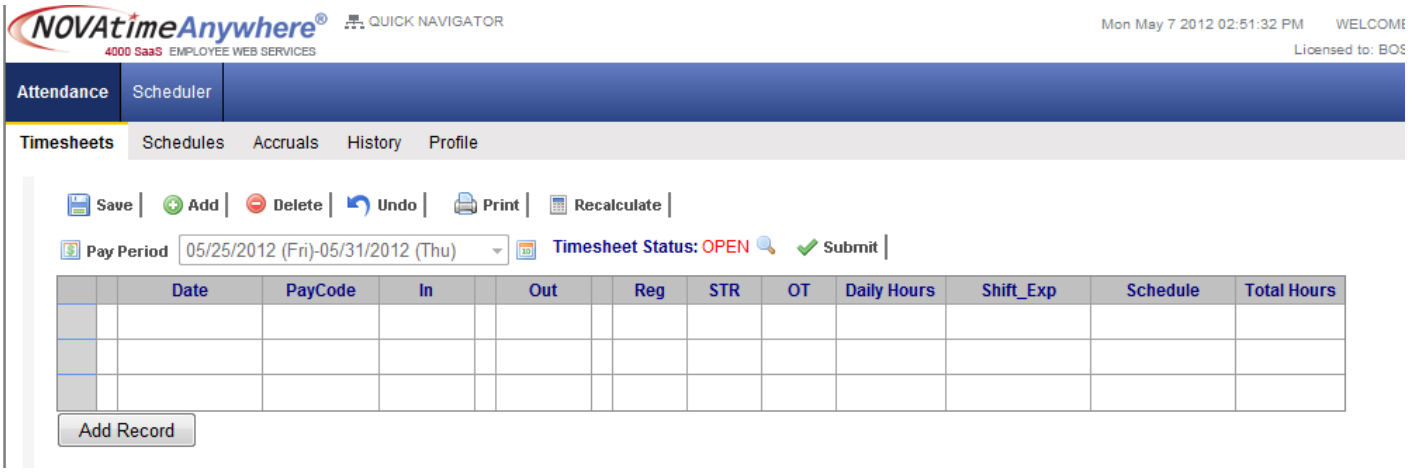
Enter your employee ID number in the ID field and click **Punch**. Your employee ID number can be located in UltiPro.

The system will prompt you to create a password. Passwords must consist of a minimum of eight characters with at least one numeric and one capital letter.

After creating a password, you should use the **Employee Web Services** button to log into NOVAtime. You can use Employee Web Services to view and make changes to your timesheet, to request time off and to view your PTO balance and usage.

CONFIRMING YOUR ACCESS – NON-EXEMPT EMPLOYEES

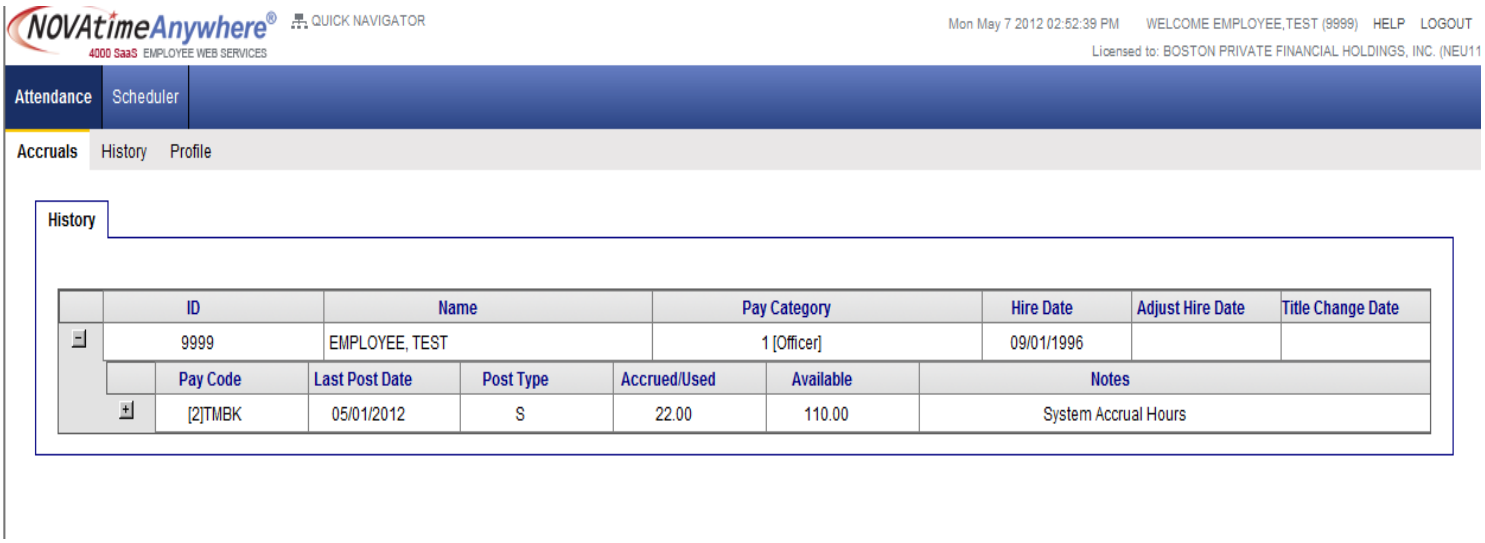
After you have logged in, you should see the following page:



This is your timesheet. If you do not see a timesheet and you are a non-exempt employee (you track your hours worked each week), please contact your HR administrator.

CONFIRMING YOUR ACCESS – EXEMPT EMPLOYEES

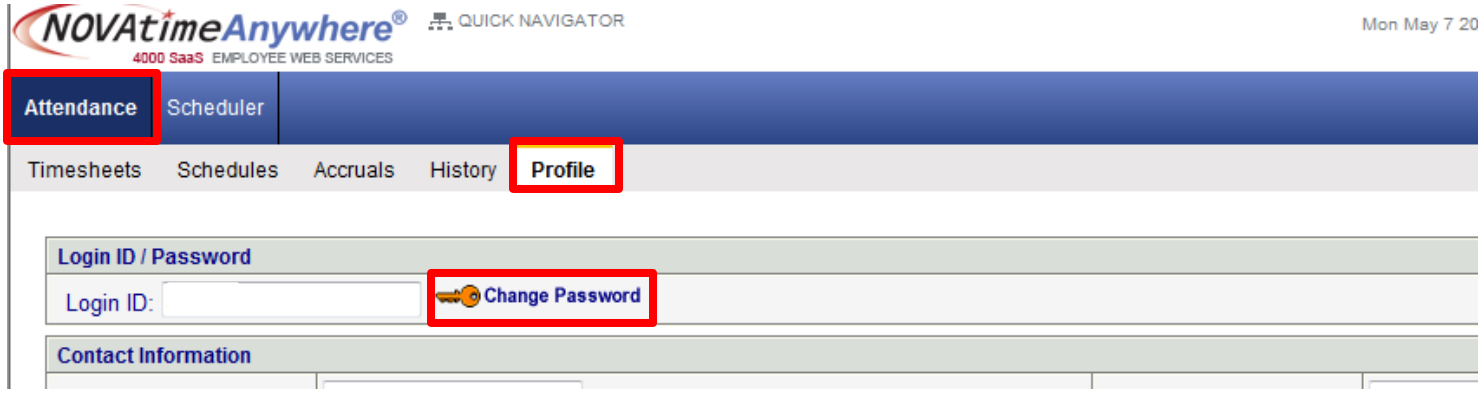
After you have logged in, you should see the following page:



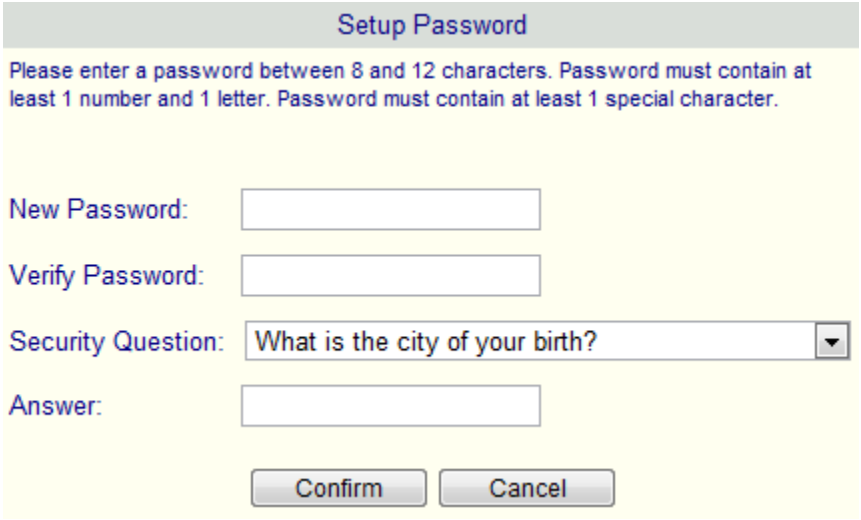
Contact your HR administrator if you see a timesheet like the one shown above and are a non-exempt employee.

CHANGING YOUR PASSWORD

Log in to your NOVAtime Employee Web Services account and navigate to the following page. Then click the **Change Password** button.



The following screen will appear – you do not have to re-enter your security question and password if you have already set this up once:

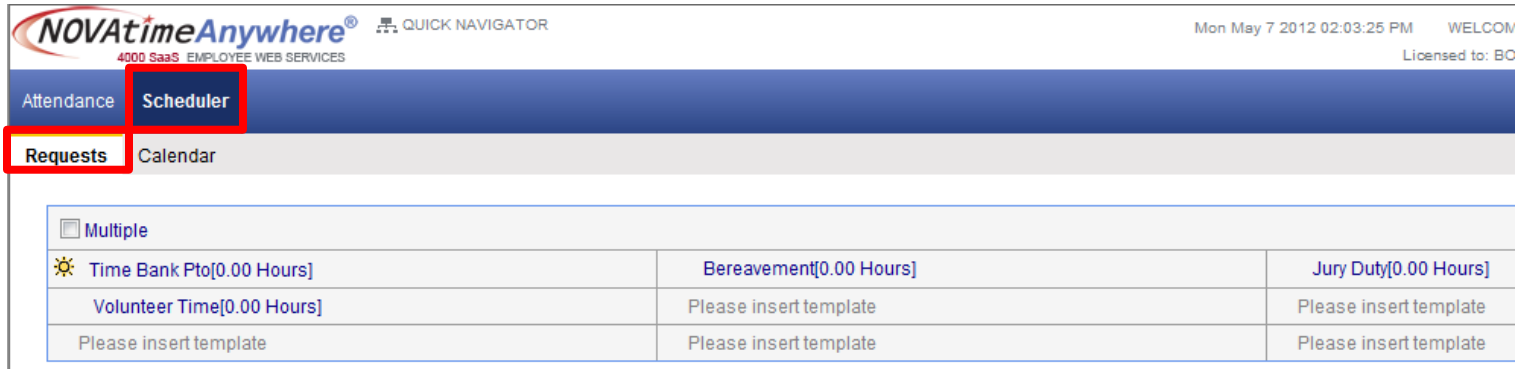


When you have entered your new password, click **Confirm**.

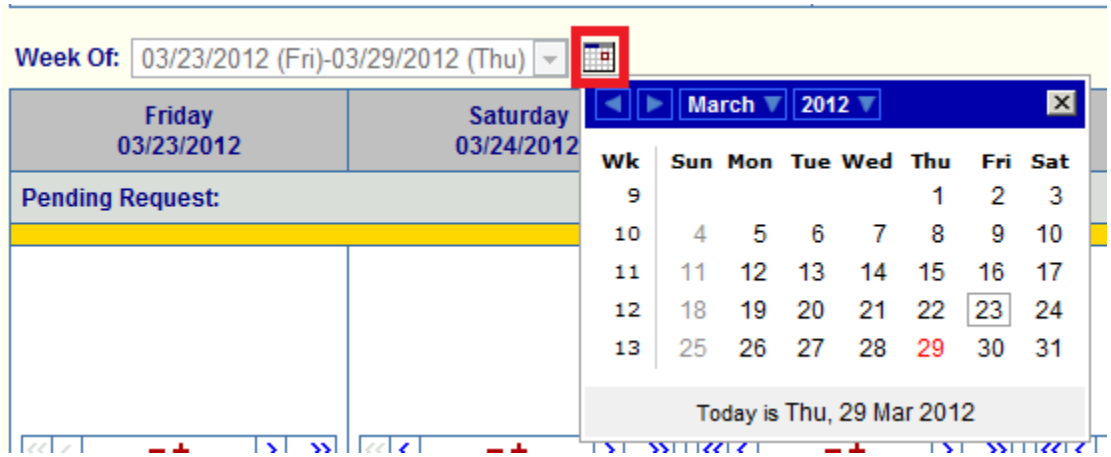
REQUESTING TIME OFF AND VIEWING YOUR REQUESTS

REQUESTING TIME OFF

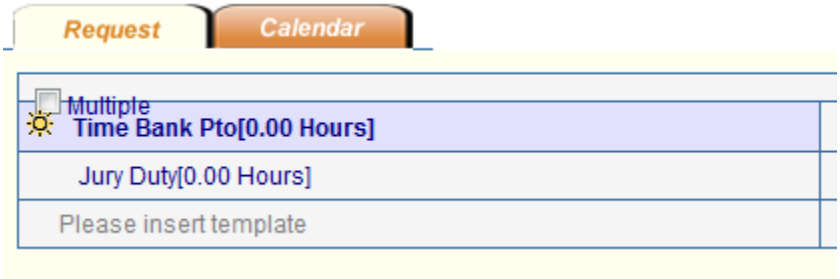
Log in to your NOVAtime Employee Web Services account and navigate to the following page:



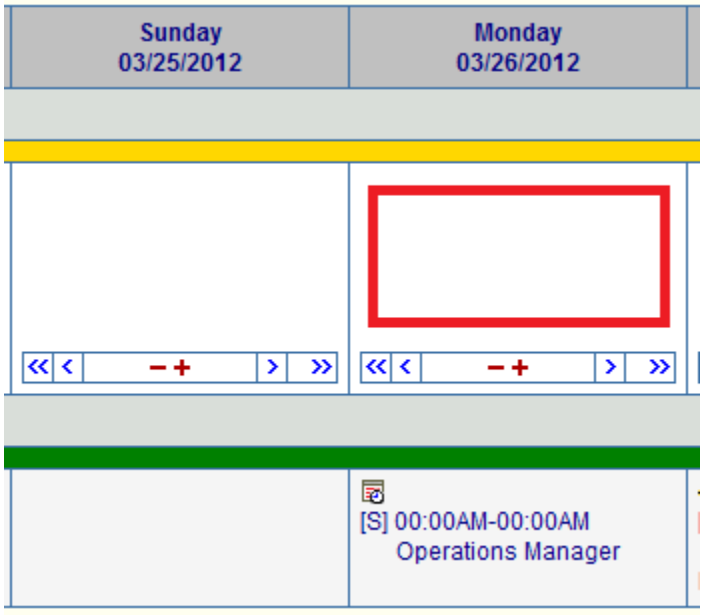
Use the calendar button to select the work week during which you want to request time off. You can click on the date for any day in that week to select that work week.



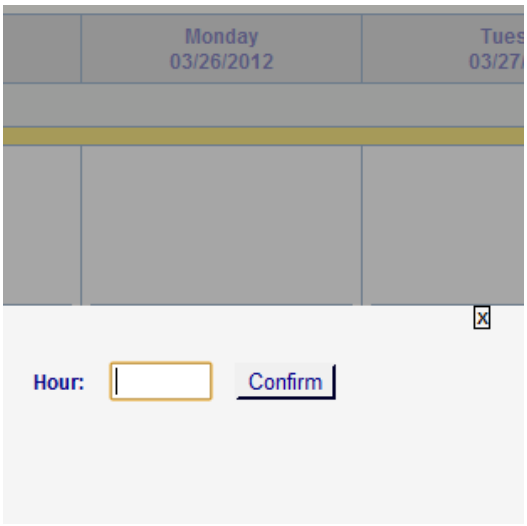
Once you have selected the correct week, click the type of request you are making at the top of the page. Usually, this will be **Time Bank PTO[0.00 Hours]**. After you click the type of request, it will be highlighted in blue as shown below:



Click anywhere in the white box for that day:

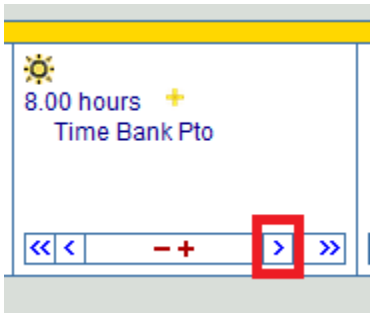


A box will pop up asking how many hours you want to request off. This will be 8.0 hours if you take the entire day off.



Click **Save**.

- Clicking the > button will copy your request to the following day.
- Clicking the >> will copy your request across the entire week.

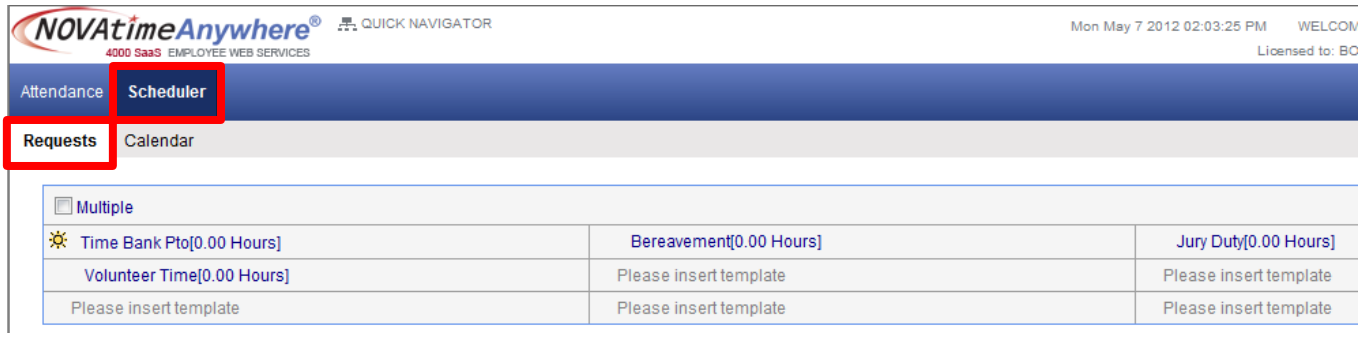


After copying your request to the correct days, click **Save**.

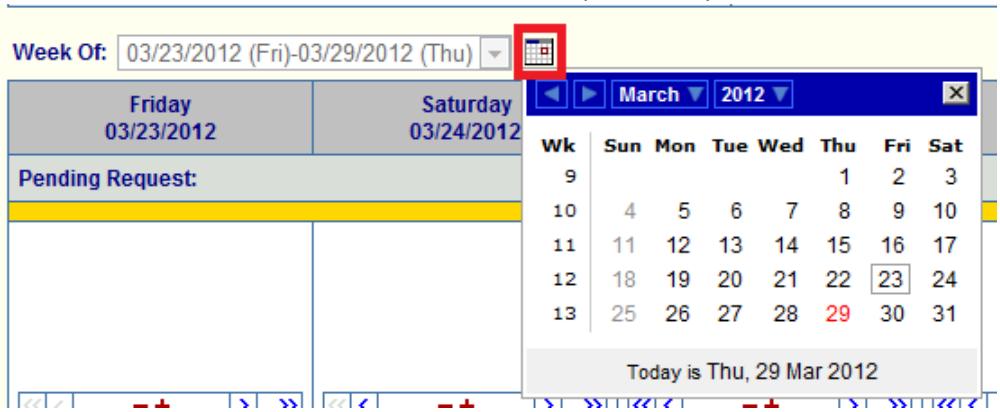
DELETING A REQUEST FOR TIME OFF

If the request has **not** already been approved:

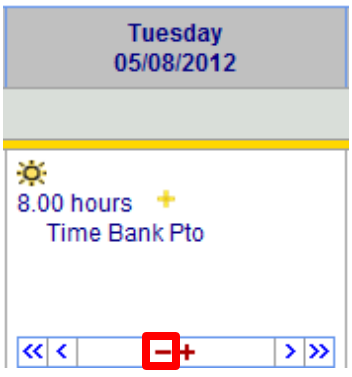
1) Go to the Scheduler



2) Use the calendar button to select the work week for the request that you want to delete.



3) Click the red minus button underneath the request:



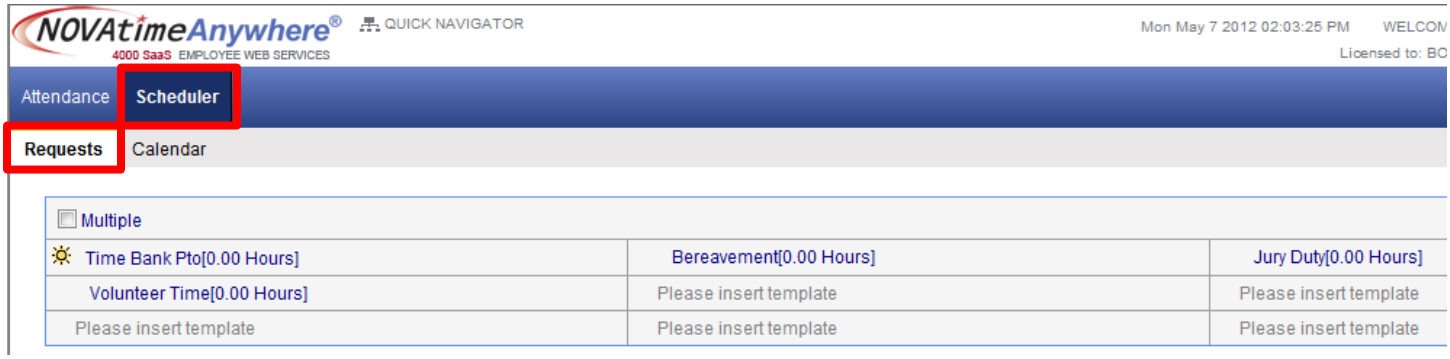
4) Click **Save**.

NOTE: If the request has already been approved, you must contact your supervisor or HR administrator to have them remove the request.

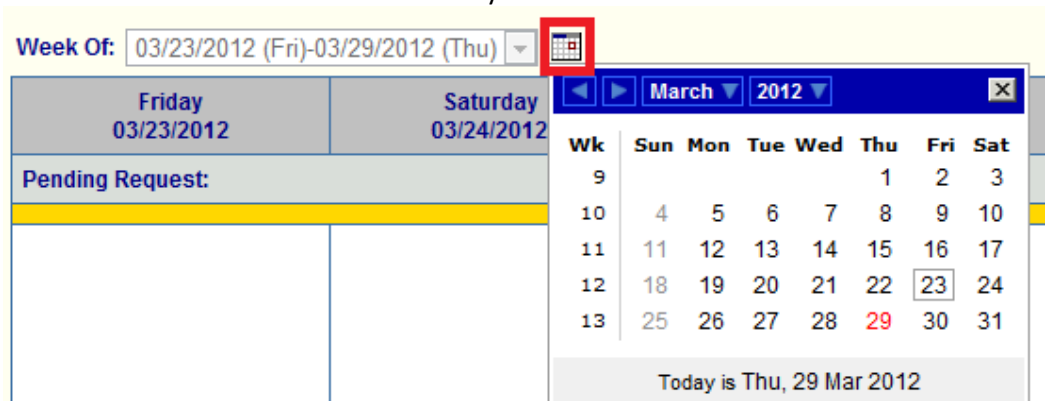
VIEWING YOUR REQUESTS FOR TIME OFF

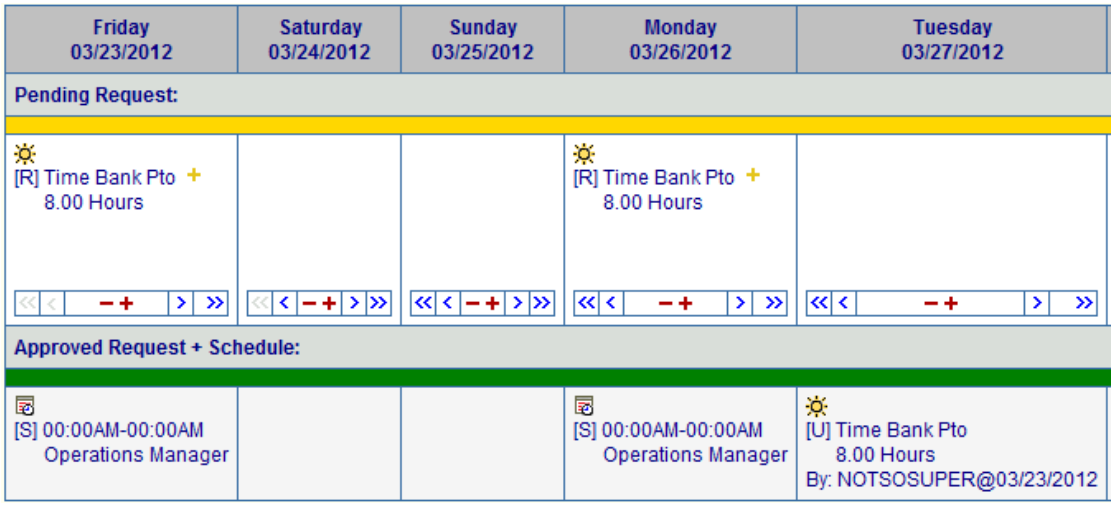
WEEKLY VIEW:

1) Go to the Scheduler



2) Use the calendar button to select the work week you want to view.



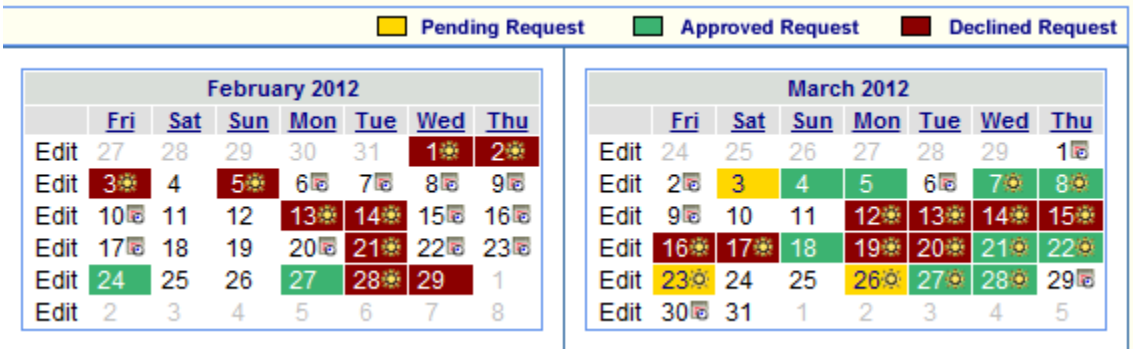


3) The first row shows pending requests (marked with an [R]). The second row shows your schedule [S] and approved requests [U].

CALENDAR VIEW:

1) Go to the Scheduler and click on the Calendar tab

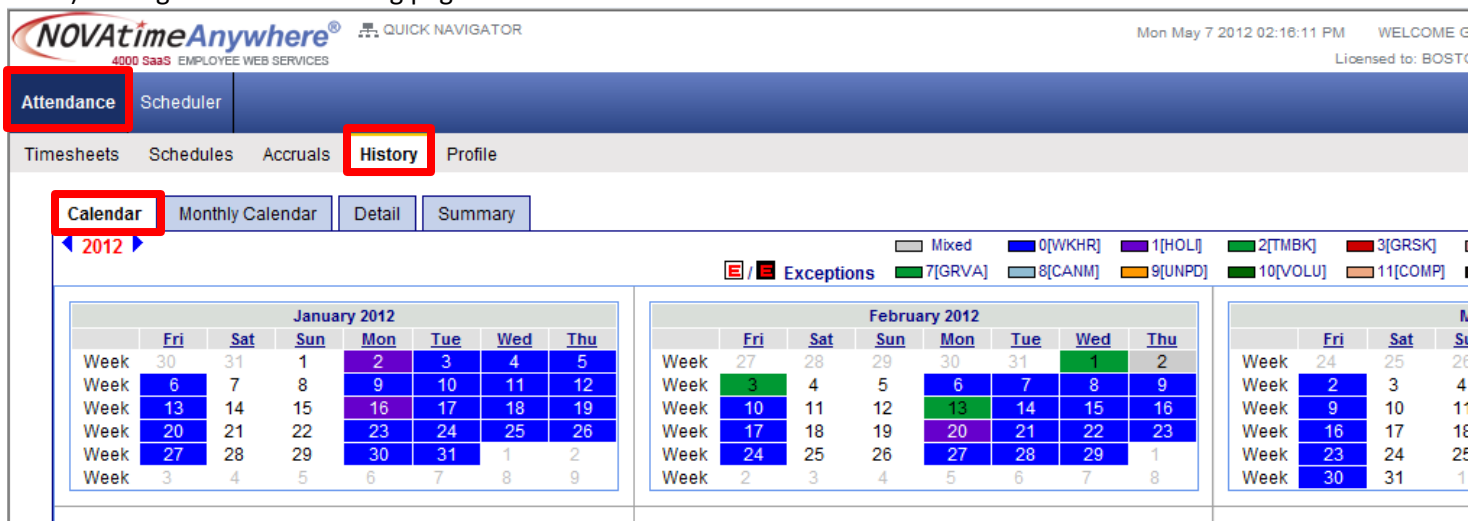
2) On this page you can look at the status of your requests. Yellow requests are pending, green requests are approved and red requests have been declined:



Note: this calendar *only* shows the status of the request. It does not show the type of the request, although for time bank requests you will see a sun icon:

To see all of your NOVAtime data on one calendar,

1) Navigate to the following page:



2) On this page you will see work hours, approved requests and the type of request (time bank, volunteer, etc.).
3) If you click on any given day, you will be directed to the detail tab for that day, which shows you more information about the time logged for that day.

Note: declined and pending requests will not appear on this calendar.

VIEWING YOUR PTO BALANCES

Log in to your NOVAtime Employee Web Services account and navigate to the following page:

	ID	Name	Pay Category	Hire Date	Adjust Hire Date	Title Change Date
+	9999	EMPLOYEE, TEST	1 [Officer]	09/01/1996		

Clicking the + boxes to the left of each row will expand them:

	ID	Name	Pay Category	Hire Date	Adjust Hire Date	Title Change Date
−			1 [Officer]			

	Pay Code	Last Post Date	Post Type	Accrued/Used	Available	Notes
−	[2]TMBK	03/01/2012	S	20.67	54.00	System Accrual Hours

Acc. Code	Type	Post Date	Hours	Carry Hours	Used	Adjust	Earned	Available	Notes
PC1	S	03/01/2012	20.67	33.33	0.00	0.00	0.00	54.00	System Accrual Hours
PC1	T	02/28/2012	0.00	41.33	8.00	0.00	0.00	33.33	Usage
PC1	T	02/27/2012	0.00	49.33	8.00	0.00	0.00	41.33	Usage
PC1	T	02/24/2012	0.00	57.33	8.00	0.00	0.00	49.33	Usage
PC1	T	02/23/2012	0.00	65.33	8.00	0.00	0.00	57.33	Usage
PC1	T	02/22/2012	0.00	73.33	8.00	0.00	0.00	65.33	Usage
PC1	T	02/21/2012	0.00	81.33	8.00	0.00	0.00	73.33	Usage
PC1	S	02/01/2012	20.67	60.67	0.00	0.00	0.00	81.33	System Accrual Hours
PC1	S	01/01/2012	20.67	40.00	0.00	0.00	0.00	60.67	System Accrual Hours
PC1	+	01/01/2012	40.00	0.00	0.00	0.00	0.00	40.00	Import Balance

The first row (highlighted in blue) is a snapshot of your accrual account for that pay code. It shows the most recent transaction – it will be the same as the first line in the table below.

This table shows all time bank balance and usage information as follows:

Column Heading	Definition
Acc. Code	"Accrual Code" – corresponds to pay category for time bank data, corresponds to pay code for all others
Type	Explains why hours were added or subtracted in this row
T	Normal PTO usage (Using a time bank day)
U	Administrator changes to the balance
S	System updates – appears on the 1st of each month when accruals are added to your PTO balance
+	Initial balance in the system
Post Date	When the hours were added or used
Hours	Hours provided through a data import or a monthly accrual
Carry Hours	Balance before this row
Used	Amount of hours used

Adjust	Hours added or subtracted by administrators
Available	Balance as of this the row's Post Date
Notes	Explains why a row is included

Pay Code Definitions (not limited to the Accrual Table):

Pay Code	Full Name	Symbol	Definition
0[WKHR]	Work Hours		Time worked – only applies to non-exempt employees. Any work hours appearing on exempt timesheets are not included in payroll.
1[HOLI]	Holiday		Holiday hours – automatically applied to each employee's timesheet for each holiday
2[TMBK]	Time Bank PTO		Standard paid time off. Can be requested by employees.
3[GRSK]	Grandfather Sick		Sick hours for west coast employees. Can only be added to employee timesheets by HR administrators
4[BRVM]	Bereavement Hours	[no symbol]	Can be requested by employees.
5[FLTD]	Floating Holiday	[no symbol]	Can be granted to an employee by an HR administrator if the employee works on a holiday. Not currently included in our implementation.
6[JURY]	Jury Duty Time	[no symbol]	Can be requested by employees.
7[GRVA]	Grandfather Vacation	[no symbol]	Vacation time grandfathered in for a very few employees whose yearly PTO allotment was slightly reduced under the new PTO policies.
9[UNPD]	Unpaid Leave	[no symbol]	Can be added to employee timesheets by HR administrators.
10[VOLU]	Volunteer Time	[no symbol]	Can be requested by employees. Each employee receives 8 hours per year.

Notes:

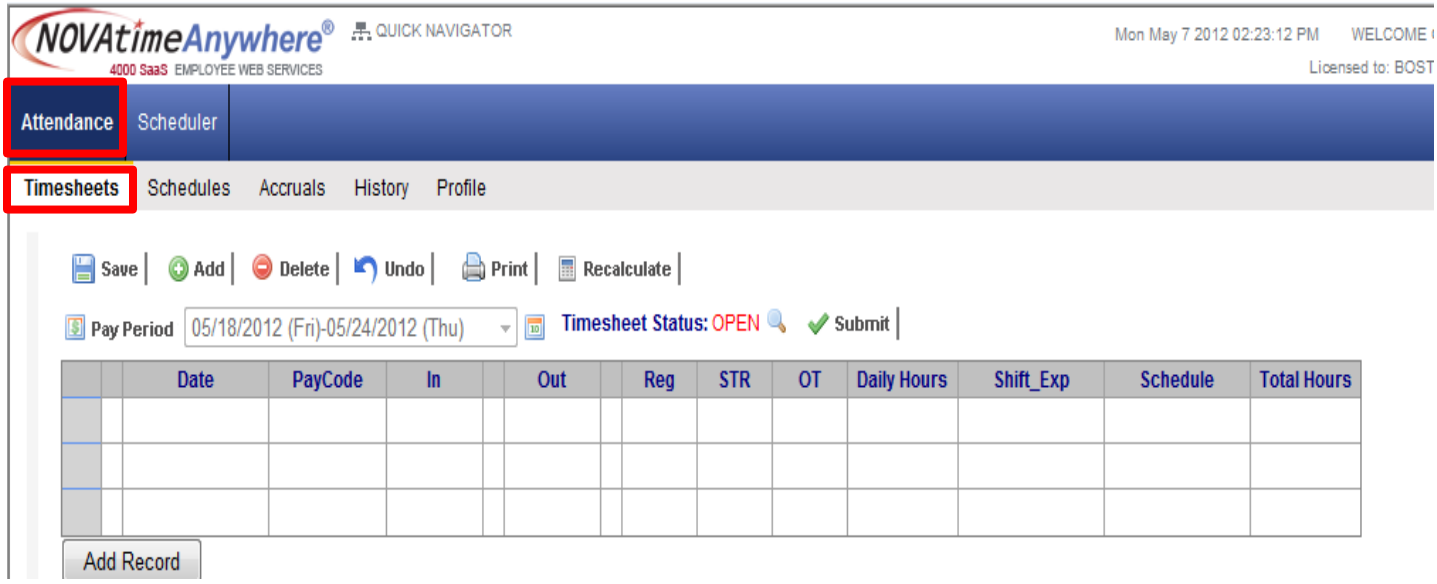
You may notice that the **Attendance | Accrual** tab does not always seem to match the accrual summary information on the **Scheduler | Request** tab. This is because the Accrual tab shows your PTO usage for the entire year, including time off that has been approved for future dates, whereas the accrual summary table on the Request tab only shows your PTO usage as of the current date.

MANAGING YOUR TIMESHEET

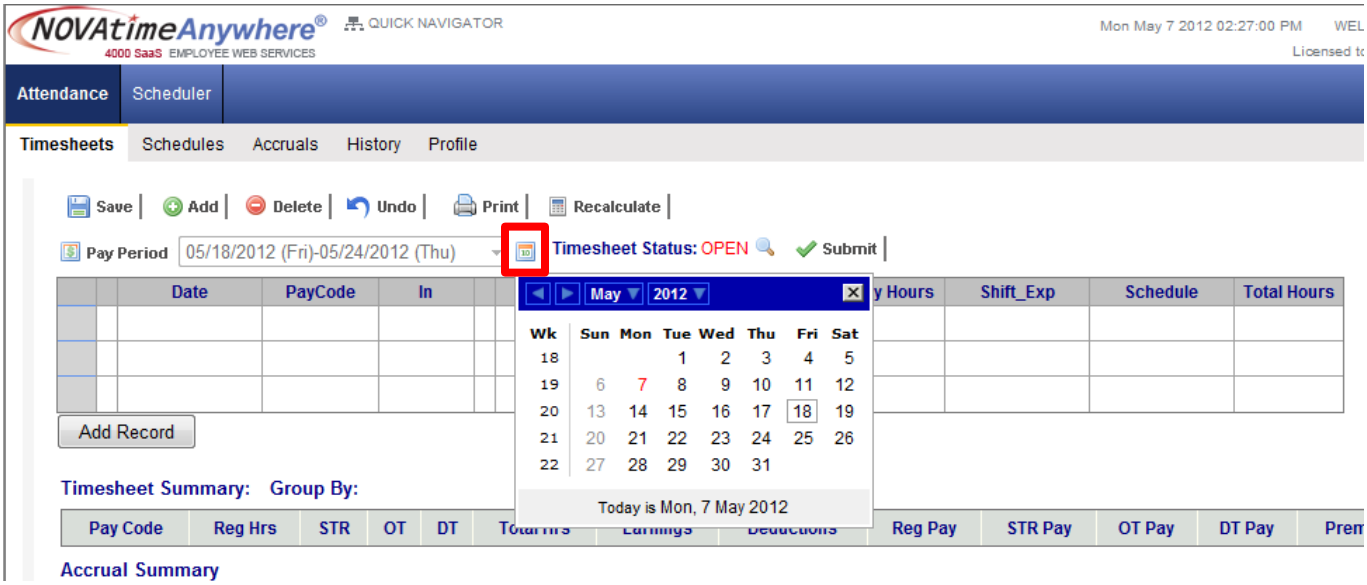
For non-exempt employees only

VIEWING YOUR TIMESHEET AND ADDING TIME

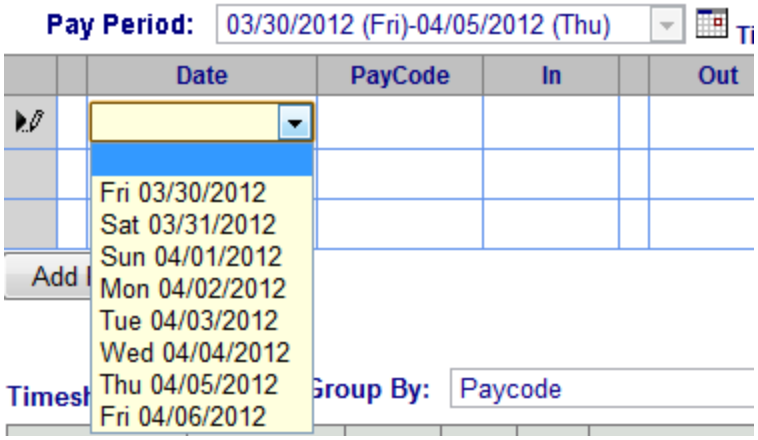
Log in to your NOVAtime Employee Web Services account and navigate to the following page:



Use the calendar icon to select the work week that you want to view. You can only edit timesheets that are marked as OPEN, but you are able to view any timesheet.

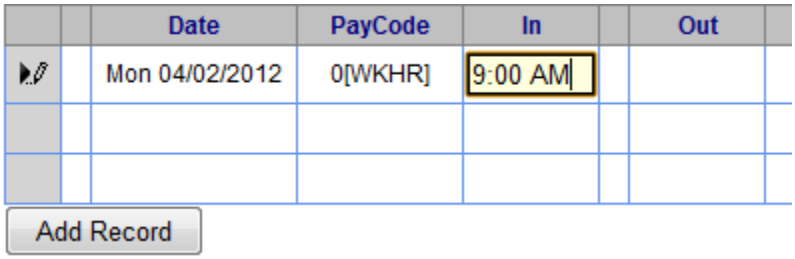


To add time, click the drop down menus in the **Date** column



Enter the **PayCode** the same way – the only option available is 0[WKHR]:

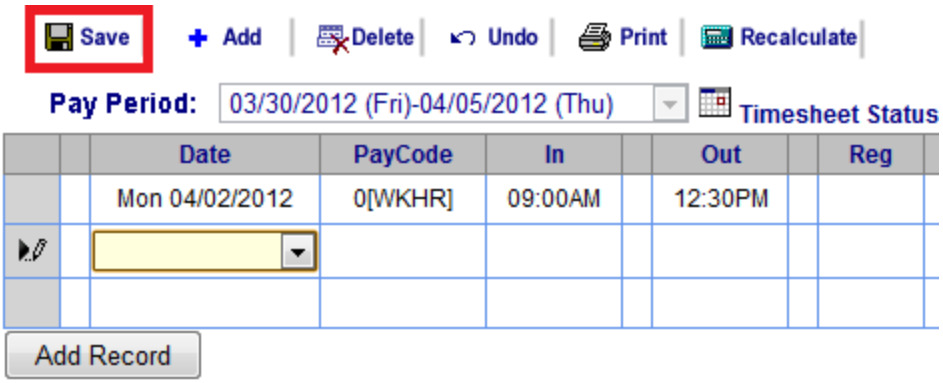
Click the box in the **In** column– this will be your starting time. Make sure you type "am" or "pm" after the time ("a" or "p" is also sufficient).



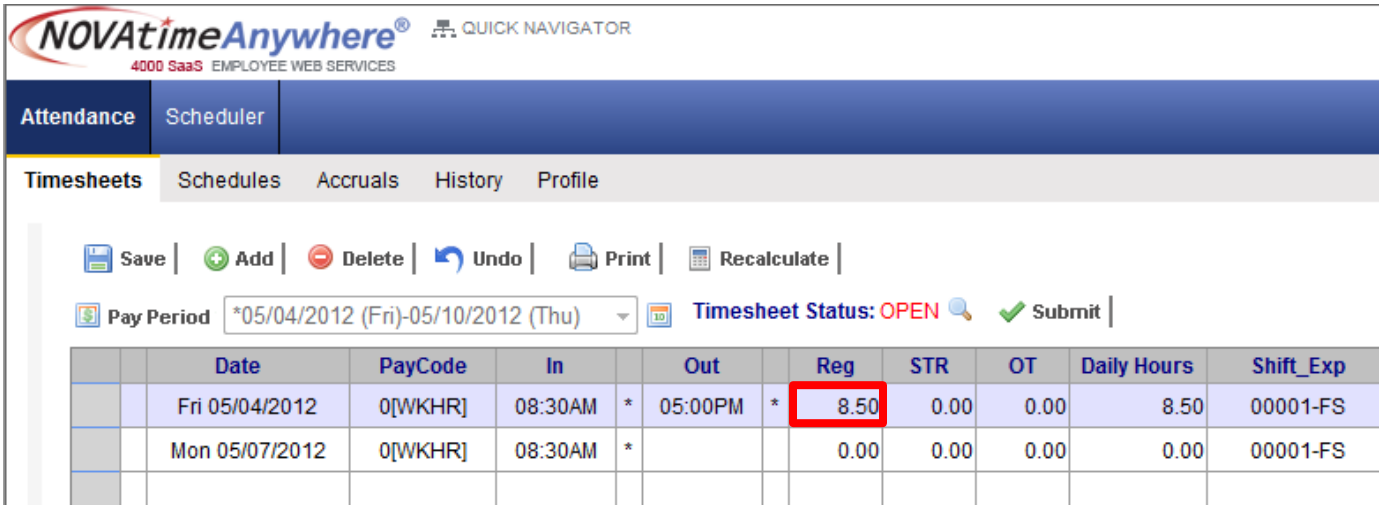
Repeat step 5 for the **Out** column – this will be your ending time.

Repeat steps 3-6 to add additional rows of data. If you need more rows, click the **Add Record** button.

When you have finished entering data, click the **Save** button



Note, the system automatically calculates the number of hours after you click **Save** – this is a good way to be sure that you have saved.

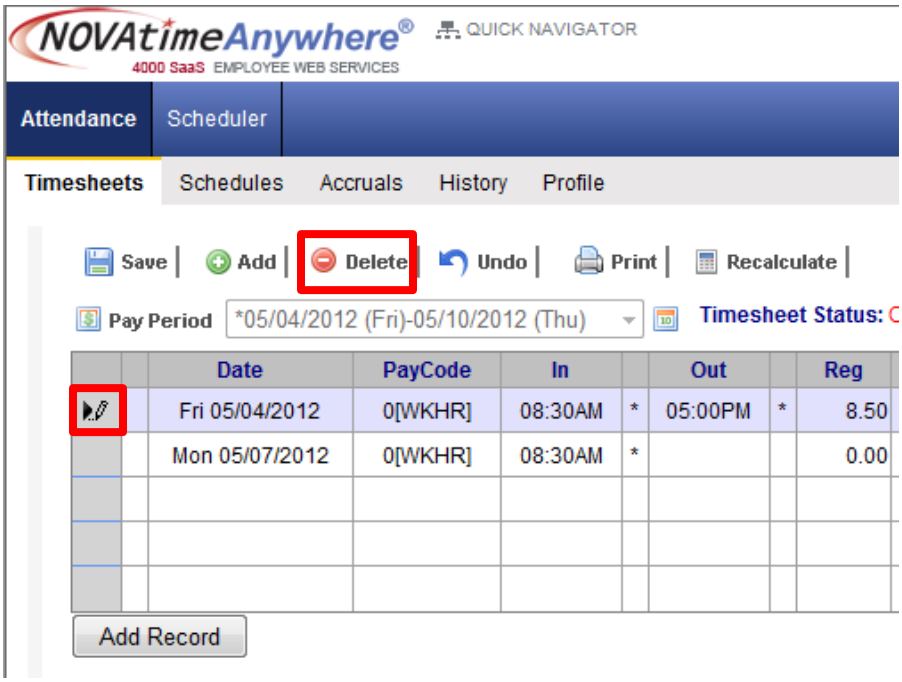


EDITING YOUR TIMESHEET

You can change the time you entered by clicking the **In** and **Out** fields and entering new information. When you have finished making edits, click the **Save** button.

DELETING INFORMATION FROM YOUR TIMESHEET

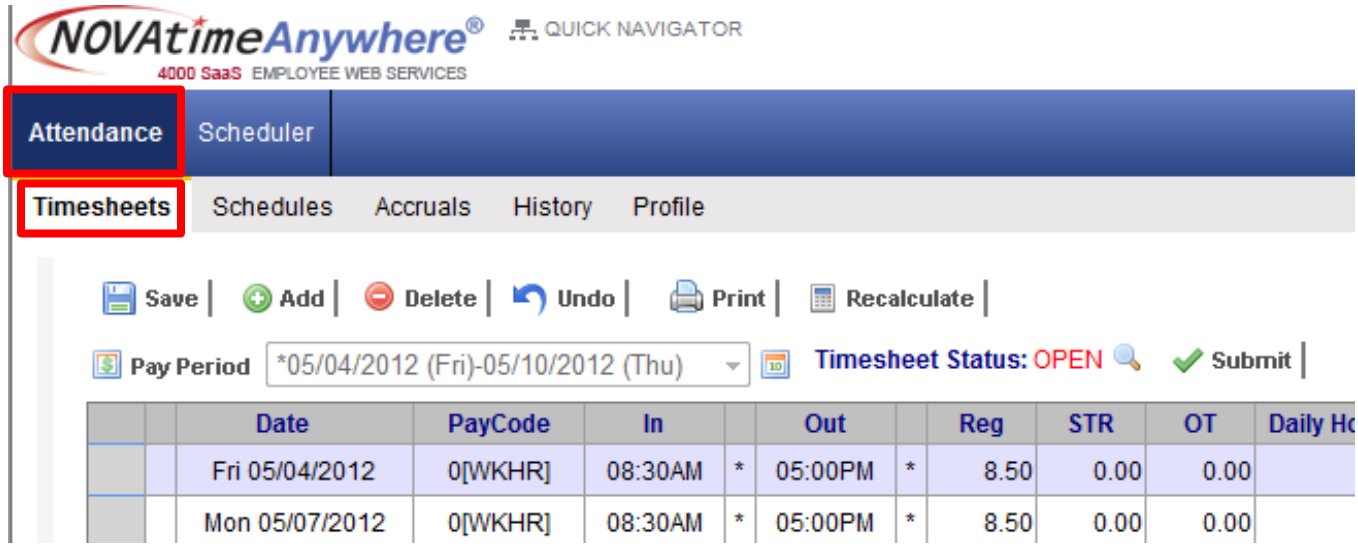
To delete a row, click the gray square to the left of that row and then click the **Delete** button. Click the **Save** button when you are finished.



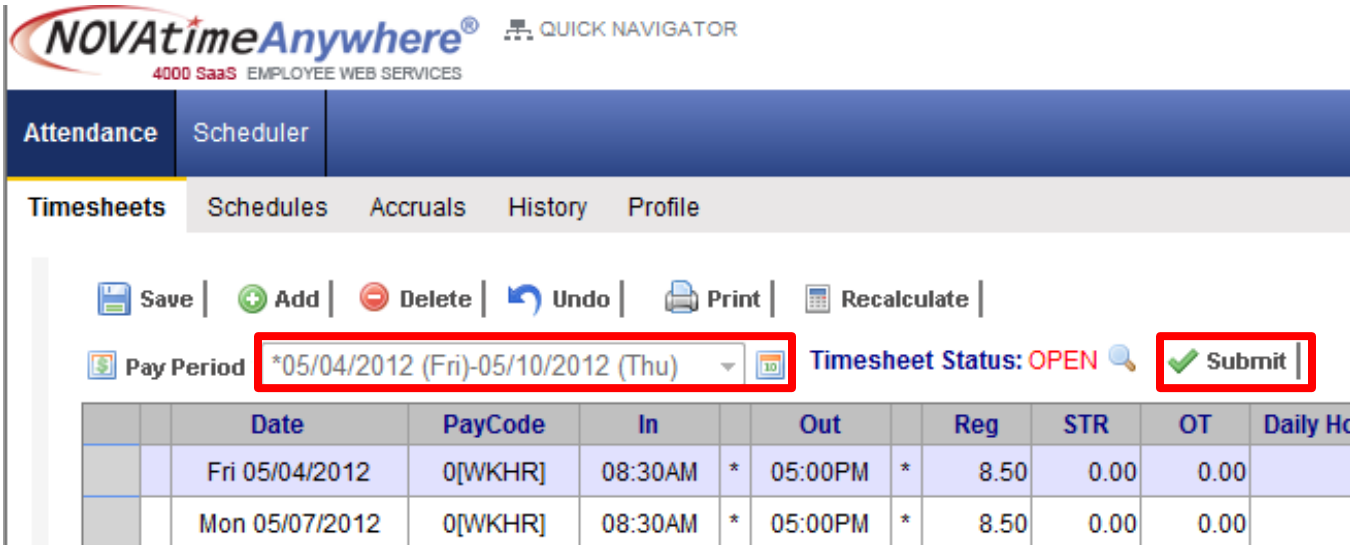
SUBMITTING YOUR TIMESHEET

At the end of every Thursday, confirm that the data on your timesheet is correct and then **Submit** your timesheet for your supervisor to review and approve.

1) First log in to your NOVAtime Employee Web Services account and navigate to the following page:



2) Use the calendar icon to select the correct week.



3) When you finish reviewing your timesheet for this week, click the **Submit** button.

Once you have submitted your timesheet, you will not be able to make any further edits unless your supervisor or an HR administrator changes the status of the timesheet back to OPEN.

EDITING A TIMESHEET THAT IS NOT OPEN

If the status of your timesheet is SUBMIT or APPROVED, your supervisor or an HR administrator can change the status of your timesheet to OPEN . When they have changed the status back to OPEN you can edit it as usual.

If the status of your timesheet is PAYROLL, only an HR administrator can change it back to OPEN. When they have changed the status back to OPEN you can edit it as usual.

STILL HAVE QUESTION ABOUT NOVATIME?

Please reach out to your local Human Resource Team if you have questions.

NovaTime Q & A

1) Q: What is NovaTime?
A: NovaTime is an online time management application that will track employee time worked, employee Time Bank requests, and other time off options.

2) Q: How can I access NovaTime?
A: A link to NovaTime will be available from UltiPro's Home Page, and the MemberCenter.
Note: There are two links to NovaTime:

1) Manager/Supervisor Link (approve employee time worked) -

https://online.novatimeanywhere.com/nova4000/wslogin.aspx?cid=1F8BDAEC-7848-4E1A-A2F5-86456FB55C14

2) Employee link (enter time worked and request time off) -

https://online.novatimeanywhere.com/nova4000/ewslogin.aspx?cid=1F8BDAEC-7848-4E1A-A2F5-86456FB55C14

3) Q: What is my User ID?
A: Employees User ID: Your employee number, which can be found in **UltiPro** (Myself -> Employee Summary (4 digit number)).

A: For Managers/Approvers User ID for logging in to Approve direct reports time worked access the Manager/Supervisor Link about and enter: First initial of first name, first nine characters of last name (ex: Mark Zucherberg User ID: mzuckerber)

4) Q: Password Criteria?
A: Must be 8 to 10 characters in length, have one number, one letter and one special character. You will answer a security question. Please retain this info in a confidential place.

5) Q: As an employee who tracks time worked, what will I need to do in NovaTime?
A: You will now track/record/log your time worked in the NovaTime application. This includes logging time In, Time Out, meal period time out and meal period time back in as well as any time off requests.

6) Q: As a manager, what will I need to do in NovaTime?
A: Approve non-exempt employees' time worked and requests for time off.

7) Q: Will I need to approve employee's time at the end of each week or just at the end of each two week pay period?
A: You must approve employee time each week, every Friday by 9:30 am.

8) Q: For payroll purposes what is the cut off for approving employee two week pay period time?
A: Employee time must be approved by Friday 12 noon (respective of your time zone).

9) Q: What if I can't approve the employee's time?
A: NovaTime is set up to accommodate a second approver and your Human Resource Team will have access to assist if needed, please work with HR.

10) Q: As a manager, what am I looking for when approving employee time worked?
A: Employee's time worked will typically be the standard 40 regular scheduled hours per week, any overtime (MA, WA and CA) or double time (CA) exceptions will automatically calculate. When approving the work week for employees you will see this amount.

11) Q: Will NovaTime track employee Meal Breaks?
A: Yes, Employees who track time need to log their off-duty meal breaks (non-working break). If an employee does not take or is not able to take an off-duty meal break and works through a meal period (after 5 hours of work in a day) this is considered an on-duty meal break and the employee will be paid for the time worked and 1 hour of regular pay will be added to the employees' work hours for the day.

Employees have the right and should be provided the opportunity to take no less than a thirty-minute off-duty (non-working) unpaid meal break when the work period is more than five hours (CA and WA) (six hours MA) except if the entire work period for that day is no more than six hours (CA). Managers should ensure that employees are aware that they have the right to and should be provided the opportunity to a full 30 minute off-duty meal break.
CA: http://www.dir.ca.gov/dlse/faq_mealperiods.htm
MA: http://www.malegislature.gov/Laws/GeneralLaws/PartI/TitleXXI/Chapter149/Section100
WA: http://www.lni.wa.gov/WorkplaceRights/Wages/HoursBreaks/Breaks/

12) Q: What about the 'Scheduler' application in NovaTime, is this how I request Time Off?
A: Yes, the 'Scheduler' is used to request time off we are working to confirm everyone's time bank balances so through the month of Jan and into Feb please be patient with this part of the application. We will follow up with confirmation email to ensure that time bank balances are accurate.

13) Q: I am a Non-exempt employee does the time worked that I enter into NovaTime effect my pay check?
A: Yes, the hours that you work over a regular 40 hours in a work week will import into our payroll database and be used to determine any exceptions to your regular pay.

14) Q: I still have questions?
A: Please reach out to your Human Resource Team or Janece Rittenberry, HRIS Manager (jrittenberry@bostonprivate.com)

BOSTON PRIVATE

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NEW HIRE CHECKLIST

Task	Completed	Waived	Instructions
I-9 document(s)	☐	N/A	To be completed by HR
Federal Tax Forms **(currently defaulted to "0")**	☐	N/A	See UltiPro Instructions to complete
State Tax Forms **(currently defaulted to "0")**	☐	N/A	
Emergency contact info	☐	N/A	
Direct Deposit	☐	N/A	
BAI Compliance Training	☐	N/A	Check email for BAI Instructions and Login information

Please return to HR within 30 days of hire

Employee Name_____

Employee Signature_____ Date_____

Human Resources Signature_____ Date_____

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