



## Phase I – Basic Company Information (Small Business)

<b>Setting Expectancies</b>		
<p>1. Using the <b>Small Business Edition</b>, you are limited to:</p> <ol style="list-style-type: none"> <li>a. <b>One Pay Period, and Holiday Table.</b> These settings will apply globally to all employees.</li> <li>b. <b>Time Zone</b> – can be set globally, or at the employee level. Once configured, the time zone cannot be changed (i.e. one employee cannot enter time across multiple time zones).</li> <li>c. <b>Pay Rules</b> – <b>up to five</b> different types of employees who follow different sets of rules (Example: Hourly, Salaried, Union, Non-Union, Temp).</li> <li>d. <b>Pay Categories</b> – you are limited <b>ten</b> worked time categories (Ex. Regular, Overtime), <b>ten</b> time off categories (Ex. Sick, Personal), and <b>ten</b> extra pay categories (Ex. Tips, Bonus).</li> <li>e. <b>Cost Centers</b> – there are <b>three</b> labor buckets available; under each bucket an unlimited list can be created. Cost Centers are non-relational and are independent lists.</li> <li>f. <b>Rates</b> – No concept of rates with respect to effective dating or as a multiplier. Static rate field will exist for reporting purposes as a reference.</li> </ol>		
<b>Contact Information</b>		
<b>Company Name:</b>		
<b>Company Address:</b>		
<b>Pay Period (select only one)</b>		
<b>Weekly</b>	<b>Pay Period Start Date:</b>	<b>Pay Period End Date:</b>
<b>Bi-Weekly</b>	<b>Pay Period Start Date:</b>	<b>Pay Period End Date:</b>
<b>Semi-Monthly</b>	<b>Pay Period Start Date:</b>	<b>Pay Period End Date:</b>
<b>Monthly</b>	<b>Pay Period Start Date:</b>	<b>Pay Period End Date:</b>
<i>NOTE: Your pay period must fit into one of the patterns defined above. If your pay period has custom dates (no set pattern, please consult your provider for further options.</i>		
<b>Holidays</b>		
<b>1. Please supply a list of holidays you observe.</b>		
<b>2. Who is eligible to receive holiday pay? Ex. Salaried Employees, Full Time Employees.</b>		
<b>4. Do you have any special rules for hours worked on a holiday? Ex. Employee receives doubletime.</b>		



<b>5. What happens if a holiday falls on a weekend?</b> <i>Ex. Paid on the weekday preceding or following.</i>	
<b>6. What additional time off categories do you utilize?</b> <i>Ex. Jury Duty, Bereavement, etc.</i>	

**Workflow**

Within the application, managers will have access to edit employee's timesheets. What we will need to achieve this is a list of employees and the manager who should have access to do so. If there are managers who supervise entire departments, then you can just send a list of departments with the managers who supervise those departments.

Employee Name	Manager 1 (View/Edit Timesheet)	Payroll Admin
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**Hardware**

<b>1. Are you planning to utilize hardware?</b>	
<b>1a. How many clocks are you looking to use?</b>	
<b>1b. In terms of connectivity, we prefer that end-users use clocks that have an Ethernet connection because data is then uploaded real-time. Is your current connection Ethernet or Modem?</b>	
<b>1c. How do employees currently interface with the clock? (Ex. Do they use a keypad to enter an employee id#? A badge? Both keypad and badge?)</b>	
<b>1d. Is there an interest for biometric validation?</b>	

**1e. Does the work environment in which the hardware terminals will reside in include any of the following conditions? Please confirm and highlight Yes or No. (\*\*NOTE: All standard devices are not be used outdoors.)**

a. Electromagnetic Pulses	Yes	No
b. Dust / Dirt	Yes	No
c. Extreme Temperatures	Yes	No
d. Moisture	Yes	No



Job Costing	
<b>1. How many physical locations do you have?</b>	
<i>1a. Will employees be working in multiple locations?</i>	
<i>1b. Are these locations in multiple time zones? (Please note, the Small Business Edition does not support multiple time zones).</i>	
<i>1c. If an employee has worked 30 hours in Location A, and 30 hours in Location B, do they receive overtime?</i>	
<i>1d. Please supply a list of your locations.</i>	
<b>2. Do you have Departments or Divisions?</b>	
<i>2a. Will the employees be moving from one department/station to another department/station?</i>	
<i>2b. Would you like department/station changes to be done on the clock?</i>	
<i>2c. Please supply a list of your departments.</i>	
Tracking Time	
<b>1. What is your standard workday? Ex. 8 hours, 7.5 hours.</b>	
<b>2. Will you be tracking any type of bonus or commission (flat dollar amount) within the time and attendance system?</b>	
<b>3. How will you be tracking retroactive pay?</b>	
<b>4. How will hourly employees track time? Ex. Punching a clock, entering their own start/stop times.</b>	
<b>5. How salaried employees track time? Ex. Only tracking Time Off or auto-pay.</b>	



<p><b>6. Should employees be able to access the system from outside of your office? Ex. Employees work in the field or from home.</b></p>	
<p><b>7. Please include any additional notes about how employees will track time.</b></p>	

### Phase II – Pay Rules

<b>Overtime</b>	
<p><b>1. How do you currently calculate overtime?</b></p> <p>1a. Please highlight:    Paid Daily?    Weekly?    Pay Period?</p> <p>1b. If Daily, at which point does overtime calculation begin?</p> <p>1c. If Weekly, on which weekday does your workweek begin?</p> <p><b>2. Does any time off count towards OT? Ex. Sick, Vacation, Personal, etc.</b></p>	
<b>Doubletime</b>	
<p><b>1. How do you currently calculate doubletime?</b></p> <p>1a. Please highlight:    Paid Daily?    Weekly?    Pay Period?</p> <p>1b. If Daily, at which point does doubletime calculation begin?</p> <p>1c. If Weekly, on which weekday does your workweek begin?</p> <p><b>2. Does any time off count towards DT? Ex. Sick, Vacation, Personal, etc.</b></p>	
<b>Breaks and Meals</b>	
<p><b>1. What is the length of your normal meal period? Ex. 30 minutes, 1 hour.</b></p>	
<p><b>2. Do employees clock out for meals?</b></p>	
<p><b>3. Do employees clock out for breaks?</b></p>	
<p><b>4. Should meals be automatically deducted?</b></p>	
<p><b>4a. If yes, how much time should be deducted?</b></p>	
<p><b>5. What happens when an employee takes longer than your normal meal period?</b></p>	
<p><b>6. What happens when an employee takes less than your normal meal period?</b></p>	
<p><b>7. How many hours will the employee have to work to be eligible for a lunch break? Ex. Employee must work 4 hours to be eligible for a 30 minute lunch period.</b></p>	



<b>8. Please list any additional rules you apply to lunch periods.</b>	
<b>Rounding</b>	
<b>1. Do you currently round employee's time?</b> 1a. If yes, please highlight:      Tenths per hour (Ex. 8:06, 8:12, 8:18)      Quarter hour (Ex. 8:00, 8:15, 8:30)	
<b>2. How many grace minutes would the employee receive?</b> <i>Ex. If employee punched in at 7:53AM, what time should that round to?</i>	
<b>3. Should lunch punches be rounded as well?</b>	
<b>4. Should punches be rounded based on a schedule?</b> <i>Ex. If an employee's schedule is 9AM-5PM, but they clock in at 8:50AM, should their punch be rounded to 9AM?</i>	
<b>Shift Premiums</b>	
<b>1. Do you have any shifts? If yes, please list.</b> <i>Ex. 11 PM - 7 AM).</i>	
<b>2. Do you pay a premium for specific shifts?</b>	
<b>3. Are premiums paid for working during the weekend?</b>	
<b>4. Please specify how premiums are paid if an employee works across the time boundaries of two different premium times?</b> <i>Ex. Shift 1 runs from 4PM-10PM. If an employee punches in at 3:45, should they be paid a premium?</i>	
<b>5. Please list any additional rules you apply to shifts.</b>	

**Phase III – Optional Features**

<b>Schedules</b>
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Within the application, you have the ability to maintain and assign schedules to employees. We can configure schedules in the system so you can track employee attendance. If this is something you would like to implement, please send us a list of employees and which schedule they are assigned to. See example format below.

Employee Name	Weekdays	In Time	Out Time	Lunch Period
Charlie Brown	M-F	9AM	5PM	1 hour