



Phase I – Basic Company Information (Mid-Market)

Contact Information			
Company Name:			
Company Address:			
Target Dates			
1. When would you like to begin clocking in?		DATE:	
2. When would you like to pass your first “live” payroll?		DATE:	
Pay Period (please highlight all that apply)			
Weekly	# of Weekly Pay Groups:	Pay Period Start Date:	Pay Period End Date:
Bi-Weekly	# of Bi-Weekly Pay Groups:	Pay Period Start Date:	Pay Period End Date:
Semi-Monthly	# of Semi-Monthly Pay Groups:	Pay Period Start Date:	Pay Period End Date:
Monthly	# of Monthly Pay Groups:	Pay Period Start Date:	Pay Period End Date:
Custom	# of Custom Pay Groups:	Pay Period Start Date:	Pay Period End Date:
Tracking Time			
1. What is your standard workday? Please list for each type of employee. <i>Ex. 8 hours, 7.5 hours.</i>			
2. Will you be tracking any type of bonus or commission (flat dollar amounts) within the time and attendance system? If yes, please list all categories that apply.			
3. Will you be tracking any kind of piecework on the employee’s timesheet? <i>Ex. # of miles.</i>			
4. How will you be tracking retroactive pay?			
5. How will hourly employees track time? <i>Ex. Punching a physical time clock, entering their own start/stop times.</i>			



<p>6. How will salaried employees track time? <i>Ex. Only tracking Time Off or auto-pay.</i></p>	
<p>7. Should employees be able to access the system from outside of your office? <i>Ex. Employees work in the field or from home.</i></p>	
<p>a. If no, please supply a list of IP addresses from your company's network that employees should be allowed to log in from.</p>	
<p>8. Should employees manually submit timesheets, or should the system automatically submit timesheets?</p>	
<p>9. Please highlight which warnings / errors the <u>employee</u> should receive when submitting timesheets (this would <u>not</u> apply if timesheets are automatically submitted by employees):</p> <p>1. Missed Punches <input type="checkbox"/> Warning <input type="checkbox"/> Error (will prevent from proceeding)</p> <p>2. Pending Time Off Requests <input type="checkbox"/> Warning <input type="checkbox"/> Error</p> <p>3. Time Off Entered > Accrued <input type="checkbox"/> Warning <input type="checkbox"/> Error</p>	
<p>10. Please highlight which warnings / errors the <u>manager</u> should receive when approving timesheets:</p> <p>a. Missed Punches <input type="checkbox"/> Warning <input type="checkbox"/> Error (will prevent from proceeding)</p> <p>b. Pending Time Off Requests <input type="checkbox"/> Warning <input type="checkbox"/> Error</p> <p>c. Time Off Entered > Accrued <input type="checkbox"/> Warning <input type="checkbox"/> Error</p>	
<p>Holidays</p>	
<p>1. Please provide a list of holidays you observe.</p>	
<p>2. Who is eligible to receive holiday pay? <i>Ex. Salaried Employees, Full Time Employees.</i></p>	
<p>3. Is there a waiting period associated with holiday pay? <i>Ex. 90-day probation period.</i></p>	
<p>4. Do you have any special rules for hours worked on a holiday? <i>Ex. Employee receives doubletime, have to work the day before or day after the holiday to be paid for holiday</i></p>	



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

Workflow

Within the application, employees can submit timesheets and time off requests to their approvers. What we will need to achieve this is a list of employees and the manager who can approve their timesheets/time off requests. If this happens in a chain (more than one manager will approve the timesheet/time off request), then please indicate who the other approvers are in the order that it occurs. If there is a chain of managers who supervise entire departments, then you can just send a list of departments with the managers who supervise those departments. The final person in a chain of managers is generally the payroll administrator. See example format below.

Employee Name	Department Name	Manager 1 (View/Edit, 1 st Approval)	Manager 2 (View/Edit, 2 nd Approval)	Time Off Requests Handler

Hardware

1. Are you planning to utilize hardware?	
<i>a. How many clocks are you looking to use?</i>	
<i>b. 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, Wireless or Modem?</i>	
<i>c. If you are using an Ethernet or Wireless device, you will need an open, available IP address that can be assigned to the clock, the gateway address and subnet mask of your network. This information can be obtained from your IT Department.</i>	IP Address (if you have multiple clocks, please list all): Gateway Address: Subnet Mask:



<p>d. 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?)</p>																					
<p>e. Is there an interest for biometric validation?</p>																					
<p>2. 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.)</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">a. Electromagnetic Pulses</td> <td style="width: 10%;">Yes</td> <td style="width: 10%;"><input type="checkbox"/></td> <td style="width: 10%;">No</td> <td style="width: 10%;"><input type="checkbox"/></td> </tr> <tr> <td>b. Dust / Dirt</td> <td>Yes</td> <td><input type="checkbox"/></td> <td>No</td> <td><input type="checkbox"/></td> </tr> <tr> <td>c. Extreme Temperatures</td> <td>Yes</td> <td><input type="checkbox"/></td> <td>No</td> <td><input type="checkbox"/></td> </tr> <tr> <td>d. Moisture</td> <td>Yes</td> <td><input type="checkbox"/></td> <td>No</td> <td><input type="checkbox"/></td> </tr> </table>		a. Electromagnetic Pulses	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	b. Dust / Dirt	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	c. Extreme Temperatures	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	d. Moisture	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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<p>Job Costing</p>																					
<p>1. How many physical locations do you have?</p>																					
<p>a. Will employees be working in multiple locations?</p>																					
<p>b. If an employee has worked 30 hours in Location A, and 30 hours in Location B, do they receive overtime?</p>																					
<p>c. Please supply a list of your locations.</p>																					
<p>2. Do you have Departments or Divisions?</p>																					
<p>a. Will the employees be moving from one department/station to another department/station?</p>																					
<p>b. Would you like department/station changes to be done on the clock?</p>																					
<p>c. Please supply a list of your departments.</p>																					
<p>3. Are you interested in tracking time against any other bucket. Ex. Projects, Clients, Tasks, Jobs, etc.</p>																					



a. Please supply a list of your Projects, Clients, Tasks, Jobs, etc.

Phase II – Pay Rules

(Please copy and paste this section for each type/group of employee(s). For example: Hourly vs. Salaried.)

Overtime

1. How do you currently calculate overtime?

a. Please highlight: Paid Daily? Weekly? Pay Period?

b. If Daily, at which point does overtime calculation begin?

c. If Weekly, on which weekday does your workweek begin?

2. Does any time off count towards OT? Ex. Sick, Vacation, Personal, etc.

Doubletime

1. How do you currently calculate doubletime?

a. Please highlight: Paid Daily? Weekly? Pay Period?

b. If Daily, at which point does doubletime calculation begin?

c. If Weekly, on which weekday does your workweek begin?

2. Does any time off count towards DT? Ex. Sick, Vacation, Personal, etc.

Breaks and Meals

1. What is the length of your normal meal period?
Ex. 30 minutes, 1 hour.

2. Do employees clock out for meals?

3. Do employees clock out for breaks?

4. Should meals be automatically deducted?

a. If yes, how much time should be deducted?

b. If yes, how many hours does the employee have to work in order for lunch deduction to occur? Ex. I must work a minimum of 6 hours to get 30 minutes deducted.

5. Do you pay any portion of their meal?



<p><i>a. If yes, how much time do you pay?</i></p>	
<p>6. Do you pay any portion of their break?</p>	
<p><i>a. If yes, how much time do you pay?</i></p>	
<p>7. What happens when an employee takes longer than your normal meal period?</p>	
<p>8. What happens when an employee takes less than your normal meal period?</p>	
<p>9. 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.</p>	
<p>10. Please list any additional rules you apply to lunch periods.</p>	
<p>Rounding</p>	
<p>1. Do you currently round employee's time? <input type="text"/></p> <p>a. If yes, please highlight:</p> <ul style="list-style-type: none"> - Tenths per hour (Ex. 8:06, 8:12, 8:18) <input type="checkbox"/> - Quarter hour (Ex. 8:00, 8:15, 8:30) <input type="checkbox"/> - Based on employee's schedule <input type="checkbox"/> 	
<p>2. How many grace minutes would the employee receive? Ex. Round to the nearest quarter hour, up after 7 minutes.</p>	
<p>3. Should lunch punches be rounded as well?</p>	
<p>4. Should punches be rounded based on a schedule? Ex. If an employee's schedule is 9AM-5PM, but they clock in at 8:50AM, should their punch be rounded to 9AM?</p>	
<p>Shift Premiums</p>	
<p>1. Do you pay a premium for specific shifts? If yes, please list. Ex. Hours worked between 11PM and 7AM are paid at a shift premium.</p>	
<p>2. Are premiums paid for working during the weekend?</p>	



<p>3. Please specify how premiums are paid if an employee works across the time boundaries of two different premium times? Ex. Shift II runs from 4PM-10PM. If an employee punches in at 3:45, should they be paid a premium?</p>	
<p>4. Please list any additional rules you apply to shifts.</p>	

Phase III – Optional Features

Benefit Accruals	
<p><i>(Please copy and paste this section for each time off category and each type of employee. Example: Hourly Sick, Salaried Sick, Hourly Vacation, Salaried Vacation).</i></p>	
<p>1. How would you like accruals to be handled in the system?</p> <p>a. System Maintained – I would like the system to be responsible for calculating accruals. <input type="checkbox"/></p> <p>b. User Maintained – I would like to be responsible for calculating accruals. (If selected, only fill out items 2 and 4 below) <input type="checkbox"/></p> <p>c. Imported – I would like balances to be imported from a 3rd party system. (If selected, only fill out items 2 and 4 below) <input type="checkbox"/></p>	
<p>2. Time Off Category. <i>Ex. Sick, Vacation, PTO.</i></p>	
<p>3. Accruals are based on... (please highlight one).</p> <p>a. Tenure based on Hire Date <input type="checkbox"/> Start Date <input type="checkbox"/> Other, please specify: <input style="width: 150px;" type="text"/></p> <p>b. Hours Worked <input type="checkbox"/></p> <p>c. Other, please explain: <input type="checkbox"/> <input style="width: 250px;" type="text"/></p>	
<p>4. Please list the date in which your accrual schedule is based on (Anchor Date). <i>Ex. January 1st, Hire Date, etc.</i></p>	
<p>5. Do you have a waiting period associated with this time off accrual? <i>Ex. 90 days, 1 year, etc.</i></p>	
<p>6. How does the employee accrue during the waiting period? (please highlight one)</p> <p>a. They do not accrue at all. <input type="checkbox"/></p> <p>b. They accrue during the waiting period, but cannot see the balance until they are out of the waiting period. <input type="checkbox"/></p> <p>c. They receive a pro-rated amount, please explain: <input type="checkbox"/> <input style="width: 200px;" type="text"/></p> <p>d. Other, please explain: <input type="checkbox"/> <input style="width: 450px;" type="text"/></p>	
<p>7. Does your company utilize carry over?</p>	



<p>a. If yes, on what date does carry over apply? <i>Ex. January 1st, Hire Date, etc.</i></p>	
<p>b. How many hours are carried over?</p>	
<p>c. Are carried over hours moved to another time off category? <i>Ex. All carried over Sick time moves to the Unused Sick bucket.</i></p>	
<p>d. Do carried over hours have to be used by a certain date? <i>Ex. I can carry over 40 hours, but I must use that time within the next 90 days.</i></p>	
<p>e. What should happen to a negative accrual balance? <i>Ex. Carried over, zeroed out, moved to a different time off category.</i></p>	
<p>8. Using the following example, when tenure changes occur mid-accrue period, how should time accrue? <i>Ex. I accrue per month, my hire date is 1/15. (Please highlight one).</i></p> <p>a. I should accrue at my new rate on 1/1. <input type="checkbox"/></p> <p>b. I should accrue at my new rate on 1/15. <input type="checkbox"/></p> <p>c. I should accrue at my new rate on 1/30. <input type="checkbox"/></p> <p>d. Other, please explain: <input type="checkbox"/> <input style="width: 500px; height: 20px;" type="text"/></p>	
<p>9. Is there a maximum amount the employees can accrue?</p>	
<p>a. If so, what happens if the employee uses some of their time off hours, are they able to accrue again to reach that maximum amount?</p>	
<p>10. How often do employees accrue? (please highlight one)</p> <p>a. Daily <input type="checkbox"/> e. Weekly <input type="checkbox"/></p> <p>b. Monthly <input type="checkbox"/> f. Per Pay Period <input type="checkbox"/></p> <p>c. Quarterly <input type="checkbox"/> g. Annually <input type="checkbox"/></p> <p>d. Semi-Annually <input type="checkbox"/> h. Custom, please explain: <input type="checkbox"/> <input style="width: 250px; height: 40px;" type="text"/></p>	



11. Please describe the schedule at which an employee accrues, adding additional rows if necessary:

a. Initially, employee receives:

b. After _____, employee receives ____ hours.

c. After _____, employee receives ____ hours.

d. After _____, employee receives ____ hours.

e. After _____, employee receives ____ hours.

E-mail Notifications

Please highlight all e-mail notifications you would like to implement:

To Employee;

- Timesheet has been approved
- Timesheet has been rejected
- Time Off Request has been approved
- Time Off Request has been rejected
- Other:

To Manager / Supervisor / Administrator:

- Timesheet has been submitted for approval (manager will receive 1 e-mail per employee)
- Time Off Request has been submitted for approval
- Employee has a negative accrual balance
- The end of the pay period is approaching
- Other: