

New Timekeeping Client Profile

This profile is designed to be used in partnership with the New Client Setup Wizard of the online timekeeping system. The questions are intended to help identify the needs of a client in order to easily and accurately move through the wizard and client set up process.

It is suggested that you ask the client all of the following questions, though some of the information may already be accessible through records used for payroll in the event that the client currently uses your payroll services. By doing so, you can ensure a smooth transition to automated time tracking.

Basic Wizard

Create Account

Company Name: _____

Client Contact: _____ Phone Number: _____

Select Account Type: ☐ 30 DAY TRIAL ☐ BILLABLE

Create Admin Account

Login and password for the master client level account:

Login: _____ Password: _____

Pay Frequency & Time Zone

Select Pay Frequency: ☐ WEEKLY ☐ BI-WEEKLY ☐ SEMI-MONTHLY ☐ MONTHLY

Pay Period Start Date: _____

Second Pay Period Start Date: (for semi-monthly only) _____

Time Zone: _____

Overtime Preferences

Work Week for OT Calculation: (ex: Sunday-Saturday) _____

Overtime Calculation Settings:

- | | |
|---|--|
| <input type="checkbox"/> FLSA: 1.5x after 40hr/wk | <input type="checkbox"/> 8H: OT after 40hr/week OR 8hr/day |
| <input type="checkbox"/> NO: No overtime (straight time only) | <input type="checkbox"/> XH: OT after 10hr/day, no DT |
| <input type="checkbox"/> CA: California Overtime Rules | <input type="checkbox"/> 12: OT after 12hr/day, no DT |
| <input type="checkbox"/> NV: Nevada Overtime Rules | <input type="checkbox"/> ON: Ontario Overtime Rules |
| <input type="checkbox"/> PP: 1.5x after 80hr/pay period | <input type="checkbox"/> AB: Alberta Overtime Rules |
| <input type="checkbox"/> OTHER: (Available through scripting, contact support or search the Knowledge Base) _____ | |

Multiple Pay Rates OT Behavior: (If there are multiple pay rates on a single time card, which method should the system use to calculate the correct overtime premium?)

- ☐ Option A: Add all the hours together and calculate a blended rate. Then calculate overtime based on that rate.
- ☐ Option B: Pay overtime strictly based on the rate in effect once the threshold is reached. (Default)
- ☐ Option C: Shuffle overtime so it's evenly spread across all punches within a calendar week. This lets you allocate overtime evenly across job codes or departments.

Rounding Rule

Select a Rounding Rule:

- ☐ None: No rounding
- ☐ C10: Round to 10 min interval in favor of employer (INs up, OUTs down)
- ☐ C15: Round to 15 min interval in favor of employer (INs up, OUTs down)
- ☐ C5: Round to 5min interval in favor of employer (INs up, OUTs down)
- ☐ N10: Round to the nearest 10 minutes
- ☐ N15: Round to the nearest 15 minutes
- ☐ N5: Round to the nearest 5 minutes
- ☐ N6: Round to the nearest 6 minutes (tenth of an hour)
- ☐ Sched15: Round anything within 15 minutes of schedule, to schedule
- ☐ Other: (requires custom scripting) _____

Advanced Wizard

Supervisor Accounts

Will permission-based supervisor accounts be required? ☐ YES ☐ NO

If so, will the client be allowed to set up and manage the account settings? ☐ YES ☐ NO

If the client will not be managing these accounts, list account specifics (This information will be entered through Login Maintenance after the account is set up through the New Client Wizard.):

Supervisor 1

Login: _____ Password: _____

Employees filtered by (select one): ☐ Department ☐ Location ☐ Supervisor

Which departments/locations/supervisors can this account view (up to 5) _____

This account: ☐ Can edit punches ☐ Can add/edit employees ☐ Can see wages

Supervisor 2

Login: _____ Password: _____

Employees filtered by (select one): ☐ Department ☐ Location ☐ Supervisor

Which departments/locations/supervisors can this account view (up to 5) _____

This account: ☐ Can edit punches ☐ Can add/edit employees ☐ Can see wages

If more supervisor accounts are needed, note the specifics on the back of the sheet.

Exception Approval

Would you like to add an "Exception Approval Box" in the time cards to give supervisors the ability to approve punch exceptions? ☐ YES ☐ NO

Minute Rounding

Show time card totals in hours and minutes (2:30 hours) rather than the default decimal hours (2.5 hours)? ☐ YES ☐ NO

Military Time

Show punch times in Military Time (14:30) rather than the default am/pm format (2:30 pm) on time cards? ☐ YES ☐ NO

Extra Categories

List pay categories needed in addition to the default categories of Regular/OT, Sick, Vacation, Holiday, Personal, Misc, Bonus, Commission, and Salary (optional). _____

Time Card Signature Line

Specify text (up to 200 characters) to be printed at the bottom of each time card along with a signature line (optional). _____

Clock Prompts

Will any data need to be collected using clock prompts (such as department, job code, tips, sales, etc.)?

If so, what needs to be collected? _____

Prompt 1:

Should everyone be prompted to enter this information? ____ If not, who will be prompted (ex: a specific department or a list of employees)? Specify: _____

How will this information be used?

☐ Displayed only on time cards

- ☐ Paid through the payroll software
- ☐ Displayed in other reports
- ☐ Other _____

If the data collected is a type of labor code (department, job code, location, etc.), a list of specific entries or codes can be added to the system to prevent invalid entries. List the valid entries (optional). _____

Prompt 2:

Should everyone be prompted to enter this information? ____ If not, who will be prompted (ex: a specific department or a list of employees)? Specify: _____

How will this information be used?

- ☐ Displayed only on time cards
- ☐ Paid through the payroll software
- ☐ Displayed in other reports
- ☐ Other _____

If the data collected is a type of labor code (department, job code, location, etc.), a list of specific entries or codes can be added to the system to prevent invalid entries. List the valid entries (optional). _____

If more space or additional prompts are needed, use the back of the sheet.

Holidays

Select the holidays that will be recognized in the system allowing hours worked to be treated differently:

- | | |
|---|--|
| <input type="checkbox"/> New Year's Day | <input type="checkbox"/> Civic Holiday (Canada) |
| <input type="checkbox"/> New Year's Day or closest weekday | <input type="checkbox"/> Labor Day (US) |
| <input type="checkbox"/> Martin Luther King Jr Day (US) | <input type="checkbox"/> Labour Day (Canada) |
| <input type="checkbox"/> President's Day (US) | <input type="checkbox"/> Columbus Day (US) |
| <input type="checkbox"/> Good Friday (Canada) | <input type="checkbox"/> Thanksgiving (Canada) |
| <input type="checkbox"/> Easter Sunday | <input type="checkbox"/> Veterans Day (US) |
| <input type="checkbox"/> Easter Monday (Canada) | <input type="checkbox"/> Veterans Day or closest weekday (US) |
| <input type="checkbox"/> Memorial Day (US) | <input type="checkbox"/> Remembrance Day (Canada) |
| <input type="checkbox"/> Victoria Day (Canada) | <input type="checkbox"/> Remembrance Day or closest weekday (Canada) |
| <input type="checkbox"/> Flag Day (US) | <input type="checkbox"/> Thanksgiving (Thursday) |
| <input type="checkbox"/> Flag Day or closest weekday (US) | <input type="checkbox"/> Thanksgiving (Friday) |
| <input type="checkbox"/> Canada Day (Canada) | <input type="checkbox"/> Christmas Day |
| <input type="checkbox"/> Canada Day or following Monday (Canada) | <input type="checkbox"/> Christmas Day or closest weekday |
| <input type="checkbox"/> Independence Day (US) | <input type="checkbox"/> Boxing Day (Canada) |
| <input type="checkbox"/> Independence Day or closest weekday (US) | <input type="checkbox"/> Boxing Day or closest weekday (Canada) |
| <input type="checkbox"/> Others _____ | |

Select a pay method for hours worked on a holiday:

- ☐ None – Treat as Regular Pay
- ☐ Pay Normal Rate – Convert to Holiday Pay
- ☐ Pay 1.5x – Convert to Holiday Pay
- ☐ Pay 2.0x – Convert to Holiday Pay
- ☐ Other (Requires custom scripting) _____

Please note that the system offers an additional layer of custom account settings and functionality through script writing. If the client has a question regarding the need for additional functionality beyond the settings found within this document, please discuss these with the client for further review and set up considerations.

To set up a list of employees in the account with their associated information (i.e., card number, web password, department, etc.), a "Bulk Employee Import" may be performed via copy-and-paste from an Excel spreadsheet. For instructions on setting up the client spreadsheet and access to the import page, refer to the "Bulk Import" utility.