

Timekeeping New Account Setup Form

Your new automated timekeeping system can be customized to meet your organization's needs. The below options will help begin the process of configuring your account. As needed, we may request additional information regarding specific features and system preferences.

Provider Information

Contact Representative Name: _____ Phone _____

Email: _____

New Client Account Information

Company Name: _____

Primary Contact: _____

Phone: _____ Email: _____

*Client Code (To Be Filled in By Provider): _____

Client Primary Admin Account

Name _____

Phone: _____ Email: _____

Login ID (Must be 8 alphanumeric characters) _____

Note: A generic password will be assigned, and the system will ask you to change your password when first logging in.

Basic Account Information

Desired Start Date: _____ Number of Employees: _____

• Time Zone: (Check one)

☐ Pacific ☐ Mountain ☐ Mountain AZ ☐ Central ☐ Eastern

☐ Check this box if you have employees in multiple time zones

• Pay Period Frequency: (Check one)

☐ Weekly ☐ Bi-weekly ☐ Semi-monthly ☐ Monthly

☐ Other custom pay frequency: _____ (e.g., 3 periods per month)

• **Pay Period Start Date:** ____/____/____

• **(For Semi-monthly only) 1st Day of Second Period:** _____

• **Day-of-week your overtime week begins:** (*Check one*)

☐ Sun ☐ Mon ☐ Tues ☐ Wed ☐ Thurs ☐ Fri ☐ Sat

• **Overtime Rule** (*Processing Rule*): (*Check one*)

The system provides many options for configuring overtime settings on your account. The setting will automatically apply overtime hours once a threshold has been met. Please select your company's overtime rule (e.g., 40 hours/week):

- ☐ FLSA: overtime after 40 hours in a week (OT40)
- ☐ 8hours: overtime after 8 hours in a day & 40 hours in a week (N1)
- ☐ 10hours: overtime after 10 hours in a day (XH)
- ☐ California OT: overtime after 8 hours in a day; double time after 12 hours in a day. Also, on the 7th consecutive day worked all hours are overtime with double time after 8 hours on the 7th day. Weekly overtime set at 40 hours (CA)
- ☐ Nevada OT: overtime after 8 hours within a day (NV)
- ☐ Nevada OT (24 hours): overtime after 8 hours worked in a 24 hour period (NV11)
- ☐ Other - Please specify: _____

Will another overtime rule apply to a specific employee or group(s) of employees?
(*Check one*)

☐ YES ☐ NO

• **Multiple Pay Rate Overtime Rule**

☐ YES ☐ NO **Use system default (most common)?** (Pay overtime strictly based on the rate in effect once the threshold is reached.)

If **NOT**, which method should be used to calculate the correct overtime premium for your employees? (NOTE: The options below alter how base pay rates are displayed; however, both methods provide the same totals.)

(*Check one*)

- ☐ 1. Manipulates overtime premiums to be based on a blended rate. Base pay rates are unaffected (may be easier to understand).
- ☐ 2. Change the base pay rate for time card rows, such that OT always displays as 1.5x the employee's base pay rate.

• **Rounding Rule** (*Processing Rule*): (*Check one*)

The system provides many options for rounding punch times, including the ability to round to an employee's schedule. Generally stated, any number divisible by 60 (i.e., one hour) can be used. A list of the most common rounding options is provided below. "*Neutral*" or "*nearest*" options are

recommended if rounding is required. Please select the rounding option you would like applied to your account.

- ☐ None: No Rounding (most common)
- ☐ 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).
- ☐ C10: Round to 10 min interval in favor of employer (not recommended).
- ☐ C15: Round to 15 min interval in favor of employer (not recommended).
- ☐ C5: Round to 5 min interval in favor of employer (not recommended).
- ☐ Round punches based on the employee schedule. (Note: Available only if *Scheduling* function is activated.)

Other (*requires custom scripting*)? Please Explain:

• **Minute Rounding:** (*Processing Rule*)

Show time card totals in hours and minutes (e.g., 2:30 hours) rather than the default decimal hours (2.5 hours)? (*Check one*)

☐ YES

☐ NO

• **Select Time Clocks:** Select the type of time clock(s) desired for employees to clock in/out. (*Check one or both*)

☐ Web Clock (clock in/out via web browser)

☐ Wall-mounted time clock(s)

If wall-mounted, how many time clocks (e.g., locations) do you plan to install? _____

--- End Basic Set Up ---

(Note: For optional advanced configuration settings, continue to next page.)

Timekeeping New Account Advanced Settings

Client Configuration

Complete the optional sections below for advanced timekeeping configuration. For settings that do not apply to your account, check "no" and skip to the next question.

#1 Clock Prompts – Should the time clock collect data from the employee at clock in/out (e.g., tips)? ☐ YES ☐ NO

ABOUT CLOCK PROMPTS (Client Configuration)

"Clock Prompts" are questions that the clock asks of the employee while clocking in or out. There are two types of prompts available: Numeric and Labor Code. These prompts can be set to collect categorical labor data or numerical data, which can be used on time cards and for reporting.

NUMERIC PROMPTS

This prompt type collects a given number showing quantity or value, such as "tips" earned, "jobs," completed, "sales," "deliveries" made, "mileage," etc.

LABOR CODE PROMPT

*Labor code prompts are used to track **department, job code, location** or other labor codes used in categorizing and reporting data. While numbers can still be used, they represent a category rather than quantity.*

Each of the data types below, or fields, can be collected at the clock and/or adjusted by supervisors/managers when "editing" time cards. To include a clock prompt on your timekeeping account, please indicate the names of the fields you wish to collect and whether they will be collected by a wall-mounted time clock or web browser only.

Note: Wall mounted (physical) time clocks are restricted to 3 numeric and 3 labor code prompts. Web clock (via web browser) prompts are unlimited.

Data or Field Name (Enter below)	Collect at time clock and/or web browser?		
	Yes	No	Web Only
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Should all employees be prompted to enter this information? (*Check one*)

☐ YES ☐ NO

If “NO,” who will be prompted (e.g., department)? Please specify:

#2 Employee Settings – Should employees be enabled to view designated authorized data regarding their personal timekeeping records? ☐ YES ☐ NO

Employee Self Service (ESS) offers customizable access for employees to punch in/out, review their personal time card, view schedule information, accruals balance, and request time off if authorized. (*Client Configuration, Employee Self Service*):

Via ESS, I would like my employees to:

- ☐ Punch in/out via ESS (WebClock)
- ☐ View their personal time card AND (check all that apply) ...
 - ☐ View notes on their time card
 - ☐ Add notes to their time card
 - ☐ *Edit times/hours on their time card (Note: This can be filtered to only apply to specific employees/departments/locations)
 - ☐ *Note: Check if you would like to restrict which employees can edit their personal time card.
- ☐ View their schedule (requires activation in *Processing Rules*)
- ☐ Request time off
- ☐ Review their time off balance (requires timekeeping *Accruals* to be activated)
- ☐ Update their phone number and email address

*Notes: _____

#3 WebClock IP Address Filter (*Miscellaneous Settings*) – Should clocking in/out through a web browser be restricted to certain IP addresses? ☐ YES ☐ NO

The IP Address Filter restricts WebClock punching to specific IP addresses. This prevents employees from clocking IN/OUT from unauthorized locations (e.g., their homes or cell phones). Leaving the IP Filter blank will allow employees assigned a “Web Password” to clock IN/OUT from anywhere.

List the IP addresses ALLOWED for Web Clock use, separating entries with commas. Use an * character as a “wildcard” to authorize a range of IP addresses. (e.g., Enter 198.60.22.20, 204.246.133.*)

IP Addresses: _____

PROCESSING RULES

The system automatically provides the following "default" set of pay categories unless otherwise specified: Regular / Overtime / Sick / Vacation / Holiday / Personal / Miscellaneous / Bonus / Commission / Salary

#4 Extra Categories (*Punch Categories*): Will additional or custom pay categories be required for your account? ☐ YES ☐ NO

If "YES," please list: _____

#5 Scheduling: A schedule application can be added to your account for planning labor hours and comparing schedules to time card information. Would you like to add scheduling? ☐ YES ☐ NO

#6 Military Time (*24hr*): Would you like to show punch times in Military Time (i.e., 14:30) rather than the default am/pm format (i.e., 2:30 pm) on time cards? ☐ YES ☐ NO

#7 Auto-Lunch: Should the system automatically deduct lunch minutes from an employee's time card? ☐ YES ☐ NO

Auto-lunch automatically deducts minutes from an employee's time card any time they are clocked in for more than a specified number of hours. (Note: Auto breaks can be overridden in the punch editor.)

(Insert amounts) Subtract: _____ "minutes" after: _____ "hours"

#8 Holidays: Would you like to select which holidays will be identified on time cards and may be eligible for additional configuration settings in the account (e.g., applicable pay rate)? ☐ YES ☐ NO

Select the holidays that will be identified in the system and eligible for additional configuration settings. (Check all that apply)

- | | |
|---|---|
| <input type="checkbox"/> New Year's Day | <input type="checkbox"/> Independence Day or closest weekday |
| <input type="checkbox"/> New Year's Day or closest weekday | <input type="checkbox"/> Labor Day (1st Mon in Sep) |
| <input type="checkbox"/> Flag Day | <input type="checkbox"/> Columbus Day (2nd Mon in Oct) |
| <input type="checkbox"/> Flag Day or closest weekday | <input type="checkbox"/> Veterans Day |
| <input type="checkbox"/> Martin Luther King Jr Day (3rd Mon in Jan) | <input type="checkbox"/> Veterans Day or closest weekday |
| <input type="checkbox"/> President's Day (3rd Mon in Feb) | <input type="checkbox"/> Thanksgiving (4th Thu in Nov) |
| <input type="checkbox"/> Easter Sunday | <input type="checkbox"/> Thanksgiving - Black Friday (4th Fri in Nov) |
| <input type="checkbox"/> Easter Monday | <input type="checkbox"/> Christmas Day |
| <input type="checkbox"/> Memorial Day (Last Mon in May) | <input type="checkbox"/> Christmas Day or closest weekday |
| <input type="checkbox"/> Independence Day | |

Custom holidays: Custom holidays (i.e., holidays not shown above) can be set up as the same date each year or to follow a recurring pattern (e.g., 2nd Tuesday in July). If applicable, enter custom holidays below.

Name: _____ Date: __/__/__ _ OR Pattern: _____
Name: _____ Date: __/__/__ _ OR Pattern: _____
Name: _____ Date: __/__/__ _ OR Pattern: _____
Name: _____ Date: __/__/__ _ OR Pattern: _____

Select a **pay method** for hours worked on a holiday: (*Check one*)

- ☐ None – Treat as Regular Pay
- ☐ Pay Normal Rate – Convert to Holiday Pay
- ☐ Pay 1.5 X – Convert to Holiday Pay
- ☐ Pay 2.0 X – Convert to Holiday pay

Other (*Requires custom scripting*):

#9 Pay Rates - Would you like to track employee pay rates on your timekeeping account? ☐ YES ☐ NO

Note: Up to nine separate pay rates can be stored for each employee in the timekeeping system.

If “YES,” how many rates will apply to each employee? (1-9) ____

#10 Additional User Fields (Optional) - Would you like additional *Departments* or *Home* fields on your timekeeping account? ☐ YES ☐ NO

Note: Up to nine separate *Departments* or *Home* fields can be stored for each employee in the timekeeping system to allow for tracking additional information for your employees.

☐ YES ☐ NO - Add *Departments*? If “YES,” how many *Departments* would you like to add for each employee? (1-9) ____

☐ YES ☐ NO - Add *Home*? If “YES,” how many *Home* fields would you like to add for each employee? (1-9) ____

Would you like a field for “Birthdays”? ☐ YES ☐ NO

#11 Time Card Approvals– Would you like to activate automated supervisor approvals (Note: Additional monthly charges may apply)? ☐ YES ☐ NO

Time card approvals will automate the time card approvals process between employees, supervisors, and managers by activating an approval button and indicator on your employees' time card. This option also includes an "Approvals Report" for members of your supervisor and management staff.

If **"YES,"** please indicate which levels of staff will approve time cards.

- I would like the following to approve time cards:
 - ☐ Employees (level 1)
 - ☐ Supervisors (level 2)
 - ☐ Managers (level 3)
- Additional supervisor approval settings:
 - ☐ Allow Managers to approve time cards on behalf of Supervisors
 - ☐ Please "lock" my prior period's approved time cards

#12 ACCRUALS – Would you like to track accrual balances (e.g., PTO, Sick, Vacation) in your timekeeping account (additional monthly charges may apply)? ☐ YES ☐ NO

Note: This setting requires a copy of your company's "time off policy" and *may result in additional setup charges*. Please provide a filled out copy of the "Accrual Form" and the "Accrual Questionnaire" (Note: Ask service provider for these documents).

#13 Extended Shift Periods (punch-join-span) – Would you like to increase the maximum length of hours allowed per shift from 18 hours? ☐ YES ☐ NO

The maximum amount per shift (clock in/out one time) is 18 hours. This can be extended to accommodate a longer shift. (Note: This is common for fire fighters or medical operations with longer shift durations). If your company requires longer than 18 hours per shift, please enter the length of the longest possible shift an employee may work at your company.

If **"YES,"** enter maximum hours authorized per shift: _____

#14 Shift Differentials - Would you like to create shift differentials to apply custom settings based on the shift worked? ☐ YES ☐ NO

Shift differentials can be configured for a variety of shift needs. Please explain your company's shifts below and how the differentials are applied (Note: If you have a complex shift differential setup, please submit the shift information in a separate attached document).

Provide shift differential explanation:

#15 Punch Date Adjustments ("Reporting Date") – Would you like to apply hours and punch times from one day to an adjacent day for employees who work a shift that spans across two work days (e.g., Mon. 10:00pm to Tue. 6:00am)? ☐ YES ☐ NO

The timekeeping system can be customized to apply hours beginning or ending on two separate days to an adjacent day if required (e.g., Ending a pay period at a time other than midnight, but assign all hours for overnight shifts based on the beginning date or ending date for the shift).

If "YES," check which apply:

☐ Shift "cut off" — Pull all hours and punch times to "yesterday"

Apply times worked before a certain time the following day back to the prior day, or "yesterday" (e.g., all hours worked before 6:00am are brought to the previous day)

☐ Shift "cut off" — Pull all hours and punch times to "tomorrow"

Apply times worked after a certain hour to the next day, or "tomorrow" (e.g., all hours worked after 6:00pm are moved to the next day)

#16 Employee Groups – Would you like to create custom "employee groups" containing only designated employees or by a specified set of "criteria" (in addition to standard assignments of department, location, etc.)?

The *Employee Groups* feature lets you group employees together for easy selection elsewhere in the site. *Employee Groups* can assist with organizing the timekeeping account for easy selection and/or to correspond with the client's staffing organization. (Example: A call center can set up groups for each of the shifts or for employees under each team leader.)

Note: Two types of groups are available:

"A LIST group" - Contains a specific selection of employees and is automatically created when you choose employees individually with checkboxes.

"A SMART group" - Created when you choose specific criteria that can be automatically matched (e.g., name, department, location). Employees are automatically added to and dropped from *Smart* groups as their information is updated.

If "YES," please enter the quantity of groups you estimate must be created: _____

Choose the type: ☐ LIST ☐ SMART ☐ BOTH

Note: Because there is no limit to how many Employee Groups you can create, you can find additional instructions on how to create Employee Groups on your own online.

#17 Supervisor Settings

1. Will any supervisors be authorized to process payroll? ☐ YES ☐ NO

2. Are employees subordinate to more than one supervisor within your organization? ☐ YES ☐ NO
3. Will supervisors need to edit and approve their own personal time cards in your organization? ☐ YES ☐ NO

#18 Supervisor Logins (*Login Maintenance*)- Would you like to create Supervisor Logins for managing employee time cards? ☐ YES ☐ NO

Note: Because there is no limit to how many Supervisor accounts you can create, additional instructions on how to create supervisors on your own can be found online.

Create your first Supervisor Login. Provide the name and email address for your first Supervisor account below. Check all boxes for the privileges the Supervisor will be authorized to manage.

1. Name: _____

Email Address: _____ Login ID: _____

Which department(s)/location(s)/supervisor(s) can this login view?

Login privileges: (*Check all that apply*)

- ☐ See Wages
- ☐ Edit Punches
- ☐ Access Employee Setup
- ☐ Edit/Delete "Unmatched" Punches

*Unmatched punches typically result from a mistyped employee PIN or an unassigned badge used by a new employee to clock IN/OUT.

Employees filtered by: (*Select one*)

- ☐ Department
- ☐ Location
- ☐ Supervisor

Is more than one filter needed? ☐ YES ☐ NO

Note: Additional Supervisor Logins can be set up in your timekeeping account.

Additional Question Details (Optional)

If you need to provide additional details for any "YES" responses given in the "New Account Advanced Settings" indicate the question number and provide additional details below.

Question # _____

Question # _____

Question # _____

Question # _____

Additional Features (Optional)

Your timekeeping account can be configured to accommodate numerous additional features and custom settings. If any additional features are required to manage your staff's time and labor, please indicate below so further review can take place in a follow up discussion.

Congratulations! Now that this form is complete, save the file to your desktop. You may be asked to email the PDF or provide a printed copy to your payroll service provider.