

# 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. Please be prepared to answer questions about how your company currently collects timekeeping information. As needed, we may request additional information regarding specific features and system preferences.

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## 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 Administrator Information

Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Preferred Login ID: \_\_\_\_\_

\*Note: A generic password of **Password** will be assigned, and the system will ask you to change your password with your initial login.

## BASIC ACCOUNT INFORMATION

Desired Start Date: \_\_\_\_\_ Number of Employees: \_\_\_\_\_

### • Time Zone: (Check one)

Pacific       Mountain       Arizona       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 pay frequency ONLY, Start of Second Pay Period: \_\_\_/ \_\_\_/ \_\_\_\_\_

• **Please specify your work week (e.g., Sun-Sat):** \_\_\_\_\_

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

- FLSA: overtime after 40 hours in a week (OT40)
- Other (Please describe): \_\_\_\_\_
- Other – State Specific: \_\_\_\_\_

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

- YES
- NO

• **Multiple Pay Rate Overtime Rule**

Do your employees have more than one rate of pay (usually dependent on job or department changes)?

- YES
- NO

If YES, how many pay rates will apply to each employee? \_\_\_\_\_

\*Note: Up to 9 pay rates may be stored for each employee

If YES, check an option below for overtime rule when multiple pay rates apply:

- Use system default (most common):** Pay overtime strictly based on the rate in effect once the threshold is reached.
- Blended:** Add all the hours together and calculate a blended rate. Then calculate overtime based on that rate.
- Shuffle:** 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** (Processing Rule): (Check one)

- 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)
- Round punches based on the employee schedule (\*Available only if *Scheduling* feature is active)

Other? (May require custom scripting) Please Describe:

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

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

(\*NOTE: this feature may alter how times are rounded if rounding is in place)

- YES       NO

• **Select Time Clocks:** Select the type of time clock(s) that will be used for employees to clock in/out.  
(*Check one*)

- Mobile Application  
 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

Would you like to configure your time clock(s) to collect data from the employee at clock in/out (e.g., job, tips, department, etc.)?

YES  NO

If YES, please indicate below which type(s) of prompt(s) apply.

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

LABOR CODE PROMPTS – used to track labor codes used in categorizing and reporting data. While numbers can still be used, they represent a category rather than quantity. This information is typically collected during the IN punch.

Department  Job code  Location  Other \_\_\_\_\_

NUMERIC PROMPTS – collects a given number showing quantity or value and is typically collected during the OUT punch.

Tips  Sales  Deliveries  Mileage  Other \_\_\_\_\_

Each of the Labor Prompts can be limited to a specific list preventing the employee from entering information that is invalid. If applicable, please provide the acceptable list you wish to collect (E.g., Wait Staff, Kitchen OR 100, 200, 300, etc.).

\*\*NOTE: Physical clocks can only accept numeric values

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**Customization may be possible.** If customization is desired, please describe it below.

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### #2 Employee Settings

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

Should employees be enabled to view designated authorized data through ESS regarding their personal timekeeping records?  YES  NO

Via ESS, which of the following pages should be made available to your employees (check all that apply):

- Web Clock
- Time Card
- Schedule
- Request time off
- Accruals Report (*\*requires timekeeping Accruals to be activated*)
- Update personal info (e.g., phone number, email address, and password)
- View notes on their time card
- Edit notes on their time card
- Edit punches on their time card (Note: This can be filtered to apply ONLY to specific employees, departments, locations, etc., if desired)
- Allow employees to view unrounded times (if rounding rules are active)
- View punch audit and comment details

Notes: \_\_\_\_\_

### **#3 Web Clock IP Address Filter** (*Miscellaneous Settings*)

Should clocking in/out through a web browser be restricted to certain IP addresses?  YES  NO

If yes, list the IP address(es) ALLOWED for Web Clock use, separating entries with commas. Use the (\*) as a "wildcard" to authorize a range of IP addresses (e.g., 198.60.22.20 or 204.246.133\*)

IP Address(es): \_\_\_\_\_

\*Note: employees will still be able to "view" their timecard from any machine.

### **#4 Mobile Time**

Should employees have access to the mobile application?

- YES  NO

If YES, should employees have access to clock in and out from the mobile application?

- YES  NO

If YES, would you like to enable Pinpoint GPS location collection for mobile punches?

- YES  NO

## **PROCESSING RULES**

### **#5 Extra Categories** (*Punch Categories*)

The system automatically provides the following "default" set of pay categories unless otherwise specified. Please indicate *desired* punch categories from the default list below:

Regular/ Overtime / Sick / Vacation / Holiday / Personal / Miscellaneous / Bonus / Commission / Salary

Will additional or custom pay categories be required for your account?  YES  NO

If YES, please list: \_\_\_\_\_

### #6 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

### #7 Military Time (24hr)

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

### #8 Auto-Lunch

Would you like the option of an automatic deduction of lunch minutes to be made from the employees' time cards?  YES  NO

\*Note: "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 (the requirements can be set on a per employee basis from the Employee Setup records).

### #9 Holidays

Would you like to select which holidays will be identified on time cards?  YES  NO

\*Note: Holidays and Holiday pay may be eligible for additional configuration settings in the account (e.g., applicable pay rate)

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

Name: \_\_\_\_\_ Date: \_\_/\_\_/\_\_ OR Pattern: \_\_\_\_\_

Name: \_\_\_\_\_ Date: \_\_/\_\_/\_\_ OR Pattern: \_\_\_\_\_

Name: \_\_\_\_\_ Date: \_\_/\_\_/\_\_ OR Pattern: \_\_\_\_\_

Should 8 hours of Holiday pay be automatically applied to the employees' timecards if they do not work?  YES  NO

If YES, should it only apply to specific employees/departments/locations?  YES  NO

Please define: \_\_\_\_\_

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

### #10 AutoAddHours

Should the system automatically apply hours to certain employees' time cards?  YES  NO

\*Note: This is common to track salaried employee hours without requiring them to clock in/out.

If YES, please specify the employee(s), day(s) of the week, and how many hours to apply:

- Employees (dept. / title / location / other \_\_\_\_\_) is = to \_\_\_\_\_

- Days of the week:  Sun  Mon  Tues  Wed  Thurs  Fri  Sat

- Number of hours to apply \_\_\_\_\_

### #11 Additional User Fields (Optional)

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.

Would you like additional *Departments* or *Home* fields on your timekeeping account?  YES  NO

If "YES," how many *Departments* would you like to add for each employee? (1-9) \_\_\_\_\_

Would you like a field for the employees' "Birthdays"?  YES  NO

### #12 Employee Pay Rates

Would you like to collect employee pay rates (Often collected by your Payroll Software)?

- YES  NO

If YES, do your employees have more than one rate of pay? (This is usually dependent on job or department changes)  YES  NO

If YES, at most, how many *Pay Rate* fields will apply to each employee? (1-9) \_\_\_\_\_

### #13 Time Card Approvals

Time Card Approvals will allow the option to electronically approve employee time cards. An approval button and indicator will appear on your employees' time cards. This option also includes an "Approvals Report" for members of your supervisory and managerial staff.

Would you like to activate electronic supervisor approvals? *\*Additional monthly charges may apply*

- YES  NO

Should Supervisors have access to the Multi Time Card Approval feature?  YES  NO

If YES, please indicate which levels of staff will 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
  - "Lock" my prior period's approved time cards (NOTE: if checked, supervisors will not be able to edit a prior pay period once it has been approved.)

Should employees, supervisors, and managers be able to view time card approvals?  YES  NO

If NO, please list which level should not see approvals: \_\_\_\_\_

#### **#14 Extended Shift Periods (punch-join-span)**

Would you like to increase the max 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. (This is common for fire fighters or medical operations with longer shift durations).

If YES, enter maximum hours authorized per shift: \_\_\_\_\_

#### **#15 Shift Differentials**

Would you like to create shift differentials to apply custom settings based on the shift worked? (E.g., Night Shift increases pay by \$.50)  YES  NO

Shift differentials can be configured for a variety of shift needs. Please explain your company's shifts below and how the differentials should be applied:

\_\_\_\_\_

\_\_\_\_\_

\*Note: If you have a complex shift differential setup, please submit the shift information in a separate attached document.

#### **#16 Punch Date Adjustments ("Reporting Date")**

Would you like hours and punch times from one day to apply to an adjacent day for employees who work a shift that spans across two typical work days (e.g., Mon. 10:00pm to Tue. 6:00am)? \*NOTE: By default, hours are reported on the day of the "IN punch." (This includes clocking back in from a break)

- YES  NO

If YES, check one:

- Yesterday Rule: Apply entire shift to prior day (determined based on IN punch)  
If selected, please specify "cut-off" time \_\_\_\_\_
- Tomorrow Rule: Apply entire shift to following day (determined based on OUT punch)  
If selected, please specify "cut-off" time \_\_\_\_\_



**#17 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, you will be given additional instructions during the training session*

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

Name: \_\_\_\_\_

Email: \_\_\_\_\_ Login ID: \_\_\_\_\_

**\*NOTE:** A generic password of **"Password"** will be assigned. The Supervisor is encouraged to change their password when they first sign in from the **"Update Personal Info"** page.

Login privileges (*Check all that apply*):

- See Wages
- Edit Punches
- Access Employee Setup
- Edit/Delete "Unmatched" Punches
- View Employee Punches in X Prompt

Employees filtered by (*Check one*):

- Department
- Location
- Supervisor

Is more than one filter needed?  YES  NO

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

**#18 Additional Question Details (Optional)**

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

Question # \_\_\_\_\_

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Question # \_\_\_\_\_

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**#19 Additional Information**

Any feature in the following section marked “yes” will be discussed during the training session.

**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.)?  YES  NO

**Employee Announcements** – Would you like to provide your employees with announcements that they can view from the Employee Self Service portal?  YES  NO

**Daily Auto Emails** – Would you and your management team like to receive automated daily emails of the employees’ punch activity?  YES  NO

If YES, please indicate when you would like to receive the email (e.g., 7:00am) \_\_\_\_\_

**#20 Accruals**

Would you like to track accrual balances (e.g., PTO, Sick, Vacation) in your timekeeping account?

YES  NO *\*additional monthly charges may apply*

*\*Note: This setting requires a copy of your company’s “time off policy” and may result in additional setup charges. Please provide a completed copy of the “Accrual Form” and the “Accrual Questionnaire” (these documents may be obtained from your service provider).*

Please list any other details that may impact the setup of your timekeeping account

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**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 timekeeping service provider.**