

NOVAtime 3000

System Setup Questionnaire



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Overview

This questionnaire is designed to help you gather your pay rules and company policies. Your responses will help us build a system that will detail how your employees' hours are calculated. Please try to answer all questions as completely as possible. If you do not fully understand any of the questions or terminology used, please indicate so by putting a "question mark" beside the question. Your technical support rep. from Cincinnati Time Systems will be meeting with you soon to go over this entire document with you. That meeting is called the walkthrough. You may call prior to the walkthrough to ask questions or simply have your questions ready on that day.

Company Information

Company _____
Contact(s) _____
Main Phone# _____ Phone#2 _____
Fax # _____
Email _____

Walkthrough Information

- Walkthrough not performed due to distance of installation
 Walkthrough performed on ____/____/____

Client Representative(s)

Cincinnati Time Systems Representative(s)

System Setup

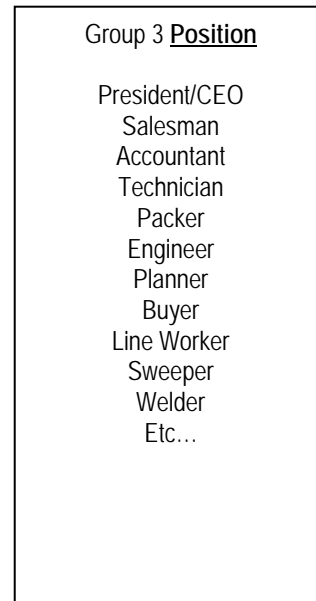
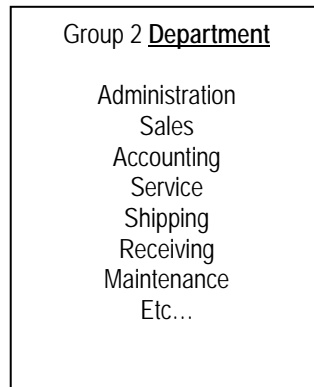
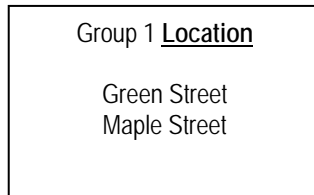
GROUPS

Groups are used in the system for report sorting and for labor tracking purposes. Up to 8 groups can be defined in the system. Typical groups might be Company, Department, and Job. Inside each of these groups you can define an unlimited list of items. For example, you might have 15 Departments listed in the Department group and 200 Jobs listed in the Job group.

Example:

Company ABC has purchased Novatime3000. The company has two locations and the payroll is done separately by location. There are 15 total Departments between the locations and the company has about 50 different Positions that employees are assigned to within those Departments.

In Novatime we would define the following 3 groups:



Week Starts on: Sun Mon Tue Wed Thu Fri Sat

Employee ID Length (6 – 20): _____.

Employee ID Alignment: Right justified blank filled Right justified zero filled

Date Format: mm-dd-yy dd-mm-yy yy-mm-dd

Display Century (4 digit year)

Time Display: AM / PM Military

Leading Zero

Payroll is done on: Sun Mon Tue Wed Thu Fri Sat

Payroll must be turned in by what time on that day?

Did you purchase an interface to a payroll system? Yes No

If YES, please provide the following information:

PAYROLL SERVICE

Which Service will you be using? _____

Contact Name at Payroll Service: _____

Contact Phone Number: () _____

IN HOUSE PAYROLL

Name of Software: _____

_____ PC Based

_____ Mainframe Based

Pay Categories

Breakdown often used for reporting purposes (ex. Full Time, Part Time, Temps, Salaried)

Pay Category ID – Alphanumeric up to 4 characters

Description – Up to 30 characters

Pay Category ID	Description

Reason Codes

List of Reasons used in time editing (ex. doctor visit, forgot to punch, car broke down, snow, etc...)

Reason ID - Alphanumeric up to 4 characters

Description - Up to 30 characters

Reason ID	Description

MEAL RULES

Do employees take meals? Yes No

Meals are Paid Unpaid

Length of meal is _____ Minutes

Do employees punch out for meals? Yes No

Meal time is fixed from _____ to _____

Meal time is flexible and can be taken between _____ and _____

Note: This may be a window of time (ex. 10am – 2pm) or a number of hours into the shift (ex. 3hrs – 5hrs)

There is no rhyme or reason to when employees take their meals

If punched out for less than the full meal length deduct:

Full Meal Exact Time Gone Round by _____

If punched out longer than the meal length deduct:

Only Meal Length Exact Time Gone Round by _____

Automatically deduct the lunch if employees do not punch? Yes No

Deduct if employee works over _____ hours

Hours Worked Meal Deduction Rule:

If the punch-out time is longer than _____ minutes, then treat it as a meal break

Please list any exceptions to the meal rules above:

Group of Employees

Meal Rule

BREAK RULES

Do employees take breaks? Yes No

How many breaks are taken? _____

Breaks are _____ minutes long

Breaks are Paid Unpaid

Do employees punch out for breaks? Yes No

Break times are fixed from _____ to _____
and _____ to _____

Break times are flexible and can be taken between _____ to _____
and _____ to _____

Note: This may be a window of time (ex. 10am – 2pm) or a number of hours into the shift (ex. 3hrs – 5hrs)

There is no rhyme or reason to when employees take their breaks

For unpaid breaks only, if punched out for less than the full break length deduct:

Full Break Exact Time Gone Round by _____

For paid or unpaid breaks, if punched out longer than the break length deduct:

Nothing Exact Time Gone Round by _____

Please list any exceptions to the break rules defined above:

Group of Employees

Meal Rule

Pay Policies

The list of Pay Policies will come from answering the following questions in the Policy Management section. Answer the questions in the Salaried/Exempt section, then fill out the Hourly section based on the most common group of hourly employees in your company. On the final page (or next to the questions) list any exceptions to the standard hourly rules and the group of employees to which the exception applies. This will help determine how many different policies you will need and what they will be called. Following are some examples of typical Pay Policies:

Salaried
Full Time
Part Time
Full Time Nursing
Part Time Nursing
Maintenance
Temps

Policy #	Description
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

Pay Policy Management

Salaried / Exempt Employees

Do you want to track Salaried/Exempt employees or have them in the system in order to run employee listing reports, etc...?

Yes No

If yes:

Will they be punching IN and OUT? Yes No

Pay Period Type: Weekly Semi-monthly, second cycle falls on the ____th day.

Biweekly Monthly Custom

Current Pay Period Dates are _____ to _____

Do you wish to have the system automatically load time based on one trigger punch each day?

Will the salaried hours be sent to the payroll system through the payroll interface in Novatime?

Hourly Employees

PAY PERIOD RULES

Pay Period Type: Weekly Semi-monthly, second cycle falls on the ____th day.

Biweekly Monthly Custom

Current Pay Period Dates are _____ to _____

New Pay Period Begins _____ (day of week) at _____ (time)

END OF DAY RULES

When an employee's shift starts before midnight and ends after midnight, which day should the hours be credited to?

- The day the shift started
- The day the shift ended.

If the cutoff time is not midnight, specify the time: _____ A.M. P.M.

For example, a company with an 11:00 P.M. to 7:00 A.M. shift may want their cutoff to be 11:00 P.M. so that the hours are credited to the day when most of them are worked.

Apply workday expansion? Yes No (Extends the day if not punched out by midnight)

- Based on workday definition:
Before the start of a workday: _____ minutes. After the end of a workday: _____ minutes.
- Based on off-clock hours:
If this employee off-clock within _____ hours, system will treat as the same workday.

Apply work-hour carry-over? Yes No (Forces punches before midnight to the next day)

Punches _____ minutes before midnight will load to the next day.

OVERTIME LEVELS & RULES

Overtime Code (Abbreviation)	Description (Description)	Rate (Multiplier)
<i>ex. OT</i>	<i>Overtime</i>	<i>1.5</i>

Overtime is paid:

- Daily After _____ Hours
- Weekly After _____ Hours Starting on which day of the week? _____
- Biweekly After _____ Hours Starting on which day of the week? _____
- Custom Cycle: _____ Days (Only available when Pay Period Type used "Custom".)
Reference Date: _____ / _____ / _____.

Apply automatic Saturday Overtime? Yes No

Apply automatic Sunday Overtime? Yes No

Do you pay consecutive day overtime? Yes No

Number of consecutive days needed to qualify _____

Days may span multiple pay cycles. All days must be in a single pay cycle.
Hours required in the previous days to invoke this rule: _____.

Does overtime need to be authorized to be paid? Yes No

If yes: Allow to be authorized at the edit timesheet screen? Yes No

Apply automatic Holiday Overtime? Yes No

Accumulate holiday work hours toward weekly overtime.

Apply out of shift / schedule overtime? Yes No

If yes: Including non-schedule days? Yes No

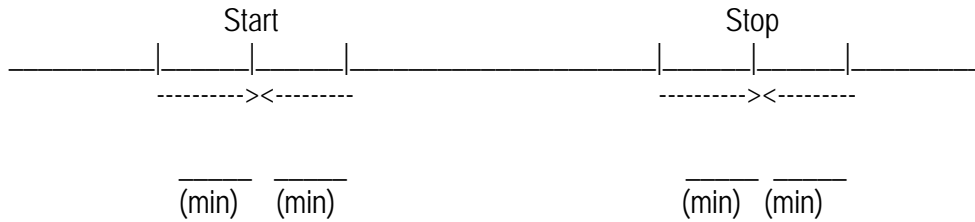
Accumulate daily overtime toward weekly overtime? Yes No, if yes:

ROUNDING RULES

Standard rounding unit used in calculating employee time:

- Exact - Totals are to the exact minute (ex. 8:03 or 8.05)
- Tenths - Totals are in 6 minute increments (ex. 8:06 or 8.10)
- Quarters- Totals are in 15 minute increments (ex. 8:15 or 8.25)
- Other _____

Shift rounding grace periods:



Fill in the number of minutes for each grace period based on a schedule start and stop time. Punches that fall within these grace periods will be rounded forward or back to the start or stop time of the shift according to the arrows in the diagram above.

Exception Grace Periods (determine when tardy or early out exception will display)

Tardy _____ minutes (number of minutes an employee can punch in late without receiving a tardy exception)

Early Out _____ minutes (number of minutes an employee can punch out early without Receiving an out early exception)

Do any of the following rounding rules apply?

In Punch Rounding (Each IN punch is rounded by this rule)

In Rounding Unit _____ In Rounding Point _____

Out Punch Rounding (Each OUT punch is rounded by this rule)

In Rounding Unit _____ In Rounding Point _____

In/Out Pair Rounding (Net rounding is done on every pair of punches)

Daily Net Rounding (Net rounding is done on the total at the end of the day)

Weekly Net Rounding (Net rounding is done on the total at the end of the week)

Other Rounding Rules (Explain below)

Apply guaranteed and limited daily hours? Yes No, if yes:

Guaranteed or limited hours: ____.

How many minutes can an employee be short of working the guaranteed hours and still be paid for the guaranteed hours? ____ minutes.

How many minutes must an employee work beyond limited hours to be paid more than limited hours? ____ minutes.

Apply schedule guaranteed hours? Yes No, if yes:

Schedule guaranteed hours if working more than ____ minutes.

Exceptions to the Standard Hourly Policy

Group

Exceptions

Premiums / Differentials

Some companies pay a higher hourly rate to employees willing to work specific and often less desirable shifts. These shifts are typically evening, graveyard, early morning, or weekend shifts.

Does your company pay any premium or differential pay? Yes No

Premiums are based on:

- Time Segment** Working within a window of time (ex. 3pm – 11pm)
- Shift Period** Working on a designated shift (ex. Assigned permanently to 2nd shift)

Using the examples as a guideline, list your company's differentials/premiums in the table below.

Type: Amount Dollar amount added to the employees regular rate
 Percentage Percentage added to the employees regular rate
 Rate Rate that replaces the employees regular rate

Description	Start Time	End Time	Type	\$ or %	Su	M	T	W	Th	F	Sa
ex. 2 nd Shift	3pm	11pm	Amount	\$.25	X	X	X	X	X	X	X
ex. Graveyard	12am	8am	Percentage	15%	X	X	X	X	X	X	X
ex. Weekends	-	-	Rate	\$15.00	X						X

Does the premium rate apply to overtime hours worked within the segment?

How is the differential or premium passed to payroll?

- Shift ID** (ex. Hours paid with a differential have a "2" or "3" in the payroll data record)
- Add On Hours Amount** (ex. Diff hours are paid using a separate pay code like "2DR" or "3DO" for 2nd shift diff regular hours or 3rd shift diff overtime hours)*

* note – Novatime currently can only pass by shift ID

Qualifiers Please list any qualifiers and other rules regarding the above premiums:
 ex. Pay premium if worked at least 3 hrs of shift within the segment, Full Time only, etc...

Accruals

NOTE: THE ACCRUALS MODULE IS NOT STANDARD IN THE NOVATIME2000 SOFTWARE. IF YOU HAVE NOT PURCHASED THIS MODULE PLEASE SKIP THIS PAGE. ALL MODULES COME STANDARD WITH THE NOVATIME3000 SOFTWARE.

The Accrual module in Novatime can be used to track benefit time and/or automatically calculate earned time off such as vacation and sick days. A simple use of this module might be to set the number of vacation hours for each employee at the beginning of each year and track their balance throughout the year. A more complex setup might calculate their available vacation hours based on years of service and post that amount once each month.

List the accrual codes you would like to track in the table below:

Accrual Code	Description	Pay Code
ex. VAC	Vacation (Full Time)	VAC

There are many other rules that may be associated with each of the codes above. If you have these rules in a written policy such as an employee handbook it would be ideal to make a copy of those rules and provide them to the technical representative at the walkthrough. Following is an example of the rules that might be associated with the Vacation accrual code above:

Rules

- Based on Hire Date
- Posting frequency is monthly
- Must work a minimum of 100 hrs each month to qualify
- Cannot carry hours forward to the next year

Computation Levels

- 1 Year of service 80 hours accrued
- 5 Years of service 120 hours accrued
- 10 Years of Service 160 hours accrued
- 15 Years of Service 200 hours accrued

User Defined Fields

In addition to the existing employee fields on the following page, there are up to 4 date fields and 8 other fields that can be defined in Novatime by the user. These fields cannot be used in calculations of any kind but can be used for sorting purposes on reports.

User Defined Date Fields: (up to 4 can be defined by the user)

Date	Caption
Date 1	
Date 2	
Date 3	
Date 4	

Other User Defined Fields: (up to 8 can be defined by the user)

Field	Caption	Input Mask
Field # 1		
Field # 2		
Field # 3		
Field # 4		
Field # 5		
Field # 6		
Field # 7		
Field # 8		

Importing Employee Data

In many cases we can import your employee data into the Novatime software to reduce your time and labor in getting the system operational. There is no additional charge for this service. The most commonly used format is an excel (.xls) file. Other file types may also be imported.

Will you be providing a file for importing of Employee Data? Yes No

The format of the file will be _____

Existing Fields on Employee Screen

Employee ID	Key number in the system (typically used also for payroll transfer)
Card Number	Number on the badge or pin# for hand readers
Last Name	
First Name	
SS#	Social Security# - Can also be used for payroll transfer if different than Employee ID
Status	Active, Inactive, Leave Without Pay
Supervisor	Supervisor this employee is assigned to
Pay Policy	Set of Rules this person is assigned to in the system
Shift Number	Home shift assignment
Holiday Rule	Controls eligibility for automatic Holiday pay
Pay Category	User definable (ex. Full Time, Part Time, Temp)
Job Title	
Group 1-8	(user defined up to 8 groups)
Pay Method	Hourly or Salaried
Pay Type	Exempt, FLSA Eligible, Non-Exempt
Pay Rates	Effective Date, Salary amount, Rates 1-?
Job Rates	Rate assignment for each Job this employee might work
Exemptions	Federal, State
FTE	Full Time Equivalency
Cert. Rate Bonus	
Hire Date	
Adjusted Hire Date	
Last Reviewed Date	
Last Raise Date	
Termination / Leave Date	
Birthday	
Title Change Date	
Probation Date / # of Days	
Email	
Phone#1	
Phone#2	
Emergency Phone#	
Contact / Relation	
Gender	
Marital Status	
Address 1	
Address 2	
City	
State	
Zip Code	
Country	

Clock Functionality

NT5000 Badge Reader

Put a check in the box next to each item you wish to implement:

Used?	General Capabilities
	Bells (provide a list of times and ring duration in seconds)
	Door Access
	Public Messaging
	Private Messaging
	Employee Name Display (on each swipe)

Used?	Employee Functions
	Use of IN and OUT Keys
	Department or Job Transfers
	View Previous Punches
	View Total Hours
	Tips Entry

Used?	Supervisor Functions
	Lockout Override
	Add Hours (list misc pay types)
	Add Earnings / Deductions
	Add / Delete Punches
	Review

Hand Readers

Put a check in the box next to each item you wish to implement:

Used?	General Capabilities
	Bells (provide a list of times and ring duration in seconds)
	Door Access
	Employee Messaging (HP4000 only)
	Employee Name Display (HP4000 only)

Used?	Employee Functions
	Department or Job Transfers
	Lockout Zones (only on HP3000 or HP4000)

Used?	Supervisor Functions
	Review
	Add Hours (list misc pay types)
	Add Earnings / Deductions
	Add / Delete Punches