

***NOVA*Time SBE 1000**
System Setup Questionnaire



9959 Cincinnati-Dayton Road
West Chester, Ohio 45069
Phone: (513) 733-5300 Fax: (513) 733-5341
Toll Free: (800) 454-8463

Overview

This questionnaire is designed to help you gather your pay rules and company policies. Your responses will help to 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.

Company Information

Company _____

Contact(s) _____

Phone# _____

Fax # _____

Email _____

System Setup

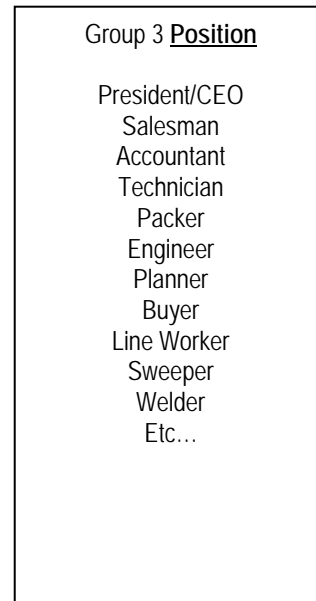
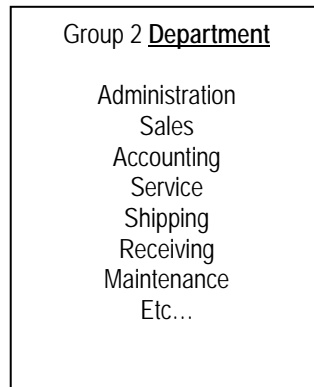
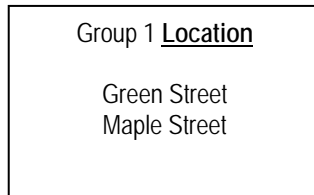
GROUPS

Groups are used in the system for report sorting and for labor tracking purposes. Up to 3 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 Novatime1000. 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

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

Display Century (4 digit year)

Time Display: AM / PM Military

Leading Zero

Will you be using 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: () _____

User Defined Fields

In addition to the existing employee fields on the following page, there are 2 date fields and 4 other fields that can be defined in SBE 1000 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 2 can be defined by the user)

Date	Caption
Date 1	
Date 2	

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

Field	Caption	Input Mask
Field # 1		
Field # 2		
Field # 3		
Field # 4		

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
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 1-4	(user defined up to 4 groups)
Pay Method	Hourly or Salaried
Pay Rates	Effective Date, Salary amount, Rates 1-?
Job Rates	Rate assignment for each Job this employee might work
Hire Date	
Termination / Leave Date	
Birthday	
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	

Shifts are available for use in SBE 1000 for the purpose of tracking exceptions such as tardiness, out early, absence, and time worked outside an employee's designated work schedule. Rounding rules such as grace periods for punching in and out are also based on shifts.

Does your company require the use of shifts for any of the reasons above? Yes No

Following are shift types available in the SBE 1000 software: Check all that apply to your company.

- Flexible (has no definitive start and stop times – allows absence tracking only)
- Fixed (has a definite start time and stop time – allows tracking of all exceptions)

Shift Templates (These templates will be used to build fixed and flexible shifts)

List below all the basic shift start / stop times commonly used within your company:

Start	Stop

Start	Stop

Please gather as much information as you can regarding the shifts in your company. The following questions may help.

Do you have a 24-hour operation? Yes No

Do employees sometimes work double shifts? Yes No

Does your company have any shifts that rotate? Yes No
 If yes, how many weeks or days is the rotation based upon? _____

Do the days off for a week vary for any of your employees? Yes No
Fixed Shifts (up to 10 max)

Fill out the following table based on the fixed shifts your company has:

Shift Description	Sun	Mon	Tues	Weds	Thurs	Fri	Sat
Ex. Plant Shift 1		700-1530	700-1530	700-1530	700-1530	700-1530	
Ex. Office 8am – 5pm		800-1700	800-1700	800-1700	800-1700	800-1700	

Meals

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

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

Pay Policies

The list of **Pay Policies (up to 5 max)** 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
Temps

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 _____

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

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 SBE 1000?

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 RULES

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: ____ / ____ / _____.

Overtime-1 Rate Multiplier: _____.

Overtime-2 Rate Multiplier: _____.

Overtime-3 Rate Multiplier: _____.

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: _____.

Apply automatic Holiday Overtime? Yes No

Accumulate holiday work hours toward weekly overtime.

ROUNDING RULES

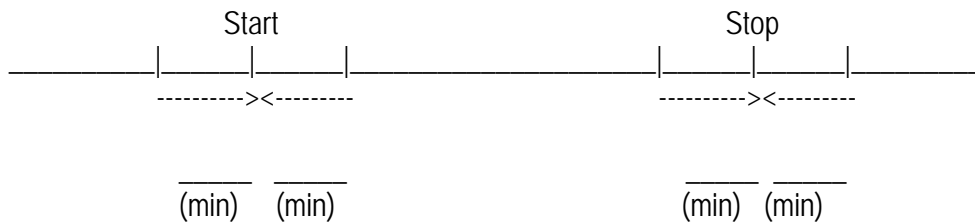
Standard rounding unit used in calculating employee time:

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)

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 _____

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)

Apply guaranteed daily hours? Yes No, if yes:

Guaranteed hours: _____.

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

Holiday Pay Rules

Do you want the system to automatically load time on Holidays? Yes No

List the group(s) of employees and the number of hours they should receive on a Holiday

Group	Hours to pay

Apply to employee on probation? Yes No

Must work the day before holiday Must work the day after holiday

How do you pay hours worked on a Holiday? _____

Other rules for how you pay Holiday time?

Holiday List

Date	Holiday

Importing Employee Data

In many cases we can import your employee data into the SBE 1000 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 _____

Time Clock Locations

Please list all of your time clock locations below.

Clock Location	Connection Type	Modem
		Line #

Clock Functionality

NT300 Badge Reader

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

Used?	General Capabilities
	Employee Name Display (on each swipe)

Used?	Employee Functions
	Department or Job Transfers
	View Previous Punches