

XactTime Questionnaire

The purpose of this questionnaire is to help us assist you in configuring XactTime.
 Please fill out as much as you can and return it to Precision Payroll Technical Support.
 You will be contacted by the Precision Payroll XactTime trainer who will schedule a questionnaire review.
 At this time you will go over any questions you may have as well as schedule your training.
 You can use the last page, the fax cover sheet, to fax this questionnaire to 630-887-0765.

Company: _____

Main Contact: _____ Title: _____

Phone: _____ Email: _____

The following two tables to be completed by trainer:

Schedules	
Benefits	
Shift Differentials	
Telephony	
IP Access	
Employee Import	
Custom Export	

Employee Import	
Pay Type Codes	
Labor Level Codes	
Live Date	
Q Review Date	

<p>Name of Payroll Company: _____</p> <p>Contact Name: _____ Title: _____</p> <p>Phone: _____ Email: _____</p>

How will your employees clock in and out? Hardware Web Telephony

If using hardware, enter the number of clocks that will be in use next to the model below and complete the Clock Configuration document at the end of the questionnaire:

TA520 _____ TA620 _____ Hand Reader _____

Approximately how many employees will be using XactTime? _____

How many locations do you have? _____

If you have an IT department, please fill in the information below:

Technical Contact Information

Name: _____ Title: _____

Phone: _____ Email: _____

Payroll Policies

You may need multiple policies for your company if you have employees within your organization who follow different rules; these are listed as Policy 1-4 below. If you have more than 4 policies please copy this section.

<i>Name of Policy</i>	Policy 1	Policy 2	Policy 3	Policy 4
What day does your work week start on?				
Is this a Weekly, Bi-weekly, Semi-monthly or Monthly Payroll Period?				
Please provide the beginning and ending dates of your current pay period.				

Do you want to track your employees early and/or late punches with a tardy report?

(Schedules must be used) Yes No

Note: *If you are NOT using schedules, please skip to the Standard Rounding section.*

<i>Round to Schedule</i>				
What Window of time would you like the In punch to round to schedule? Before/After				
What Window of time would you like the Out punch to round to schedule? Before/After				
<i>Standard Rounding</i>				
What window of time would you like the IN punch to round using the following guidelines? Nearest, Next or Previous (Ex: 7/8 split)				
What window of time would you like the OUT punch to round using the following guidelines? Nearest, Next or Previous (Ex: 7/8 split)				
<i>Overtime</i>				
Do you pay time and a half over 40 hours per week?				
Do you pay time and a half over 8 hours per day?				
Do you pay double time? If so after how many hours? Per day or per week?				

Do you pay any other kind of overtime? _____

Holidays				
Do you pay holidays?				
Does the person need to be employed for a certain number of days before being eligible for the holiday pay? If so, how many days?				
Does the employee get paid for the holiday only if they are scheduled to work on the holiday?				
If using schedules please complete the following 3 questions.				
Must the employee work their scheduled day before and/or after the holiday in order to be paid for the holiday?				
Must the employee work their entire scheduled shift? (If NO, please enter minimum minutes below.)				
How many minutes before and/or after?				
If not using schedules, please complete the following 2 questions.				
Must the employee work a minimum number of minutes before and/or after the holiday in order to be paid for the holiday?				
How many minutes before and/or after?				
How much time should be added for an un-worked holiday? (Please select from the following 2 options)				
Number of minutes				
Scheduled hours only				
How much time should be added for a worked holiday? (Please select from the following 2 options)				
Number of minutes				
Scheduled hours only				
Do Holiday hours apply towards Overtime?				
Should worked hours on a holiday be paid at an overtime rate? If so what rate (OT1 or OT2)?				
Lunch				
Do your employees clock for lunch?				
Do the employees manually clock in/out for lunch?				
Is lunch deducted automatically? If so, how much time?				
If lunch is deducted automatically, after how many minutes of being clocked in would you like the lunch deducted?				
Is lunch paid?				
Is lunch applied to OT?				
Lunch Rounding -----IF YOU DO NOT USE LUNCH ROUNDING PLEASE SKIP TO THE BREAKS SECTION				

Do you want to round the lunch punches? If so, please review and answer the questions below based on the type of rounding you wish to use.				
What window of time would you like the START LUNCH punch to round using the following guidelines? Nearest, Next or Previous (Ex: 7/8 split)				
What window of time would you like the END LUNCH punch to round using the following guidelines? Nearest, Next or Previous (Ex: 7/8 split)				
Would you like to round the entire lunch duration? If so, please answer the question below.				
What window of time would you like the duration to round to? Nearest, Next or Previous (Ex: 7/8 split)				
Short Lunch Rounding				
Would you like to round short lunches DOWN to a certain number of minutes?				
If so, how many minutes?				
Do you only want the above rule to take effect if the lunch was less than a certain amount of time?				
If so, how many minutes?				
Would you like to round short lunches UP to a certain number of minutes?				
If so, how many minutes?				
Do you only want the above rule to take effect if the lunch was less than a certain amount of time?				
If so, how many minutes?				
Breaks				
Do your employees clock for break?				
How many breaks do they clock for?				
How long is each break?				
Are the breaks paid?				
Are breaks applied to OT?				
Break Rounding				
If the employees punch in/out for break, do you want to round their punches?				

<i>Employee Settings</i>				
Do you want missing out punches to automatically be punched out after a specific amount of time has elapsed?				
If YES...				
1) How much time should elapse from the clock in punch before the automatic clock out occurs?				
2) How many minutes should be given to the employee when they are automatically clocked out? (length of their shift)				
Do you want to restrict the employees from clocking IN for a certain amount of time prior to their scheduled time? If so, how much time? (Schedules must be used)				
Allow these employees to view the status board?				
Allow these employees to change their password?				
Do you want the employees to approve their time electronically? (Must use Web Punching)				
Do you want the "Transfer" option to appear after the employees clock in on the web?				
Do you want to require a note from anyone adding or editing a timesheet? (If you do not require a note there will still be a place to voluntarily leave a note.)				
<i>Time Sheet Processing Configuration</i>				
For shifts that begin on one day, and end on the next, do you want the time to be credited to the punch in day, or the day of the punch out?				
Reject duplicate punch time within how many minutes of each other?				
Reject opposing punch time within how many minutes of each other?				

Shift Differentials

This is paid based on a set start and stop time. This is not related to departments, but can be assigned to different groups of employees.

<i>Templates</i>				
Do you have shift differentials?				
What is the \$ amount?				
What days of the week do you pay the shift differentials? (Everyday, Mon-Fri, etc)				
What is the Start and Stop time? (You may have multiple shifts)				

Clock Configuration

Clock _____ of _____

Please complete one form for each clock.

What type of clock is this? TA520 TA620 Hand Reader: 1000 2000 3000 4000

Clock Description: _____
(What would you like to name this clock?)

How are you going to be communicating with this clock?

TCP/IP IP Address: _____

Modem Com Port: _____ Baud Rate: _____ Phone Number: _____

Serial (RS232) Com Port: _____

What time zone is the clock in? Eastern Central Mountain Pacific

Is daylight savings time observed? Yes No

Do you want to allow the employees to transfer between labor levels (Locations, Departments, Jobs, etc.) on the clock? (Not available when using the Hand Reader 1000.) Yes No

Do you want to allow the employees to punch for the lunches and/or breaks? Lunch Break Both

How will the employee punch at this clock?

Magnetic Badges Bar Code Badges Key In Badge Number Other

If the employees are using badges, do you want to allow badge-less entries at the clock if they forget it?
Yes No

Would you like a message displayed on the clock while it is idle? (This feature can only be used with TA520 and TA620 clocks.)

Message: _____

How often would you like to poll the clock?

Interval Type: Minutes Hours Days

Interval Length: _____ (Number of minutes, hours or days)

Fax

To: Precision Payroll Technical Support From: _____

Fax: 630-887-0735 Pages: _____

Phone: 630-887-3156 Date: _____

Re: XactTime Clock Questionnaire CC: _____

Urgent For Review Please Comment Please Reply Please Recycle

● Comments: