

Advanced Tracker Technologies Inc

Time Adjustments and Distribution

Overview

This document details the ways Employee Tracker can adjust and distribute pay time. It covers the settings available in both the 'Standard' and 'Advanced' Time Calculation Rules, as well as how Shift Lunch Rules are setup and used.

Time Calculation Rules

The time calculation rules are the main force governing adjustment and distribution of paid time in Employee Tracker. Maintenance of the rules is performed at the menu Setup->Time Calculation Rules. Here the user is given the opportunity to add, edit, delete, copy or rename rules.

'Standard' Time Calculation Rules

Each rule is broken down in a tabbed dialog. We'll discuss each tab as an entity.

Rounding

Employee Tracker allows for two rounding methods: round the swipes or round the day.

Round the swipe time

The first option available when rounding the swipe times "If employees SCAN IN EARLY do you pay them for the additional time", when checked, grants an employee pay for work prior to the shift start time, barring the fulfillment of the "How many minutes EARLY do they have to be?" setting which becomes available when early pay is permitted. This can be tuned to catch times which most probably are premature scans for the shift start.

The next couple of options detail the rounding of scan in and scan out times. Both the in and out rounding settings behave the same.

Rounding of a particular time of the day has two parts: the rounding minutes and a grace period. Rounding minutes are always divisible by 60, and options for 0, 6, 10, 12 and 15 are available in Employee Tracker. This setting states that any time of the day must fall on the rounding minute interval. For example, a setting of 15 for rounding minutes will ensure that the time is 0, 15, 30 or 45 (e.g. 7:00, 7:15, 7:30, or 7:45).

The grace period sets the direction of rounding for any intermittent value. The grace period extends a zone of time for the rounding increment in which any time caught gets rounded back to the previous rounding minute. Therefore the grace period can never exceed the rounding minutes.

For example, a rounding minute setting of 15 with a grace period of 5 would always round back swipe times 5 minutes after each increment. Therefore a swipe at 7:16 would round to 7:15. As well as scans at 7:17, 7:18, 7:19 and 7:20. But a scan at 7:21, which is beyond the grace period reach from the rounding increment, would round forward to 7:30. As would any scan up to 7:35!

The bottom option "If employees SCAN OUT LATE do you pay them for the additional time", when checked, grants an employee pay for work after the shift stop time, barring the fulfillment of the "How many minutes LATE do they have to be?" setting which becomes available when late pay is permitted.

The lower left corner also has a button labeled Incidental Rounding Rules. These are further enhancements to the rounding described above, but are only effective for short durations of time near the start or stop of the transactional shift.

Incidental rules are broken down into four areas: rounding "Prior to Shift Start", "After Shift Start", "Prior to Shift Stop" and "After Shift Stop". Each one can be enabled independently for customized rounding scenarios.

The first option on any of the four incidental rounding possibilities details how many minutes around the shift start or stop the incidental rule is effective for. The remaining options per incidental possibility are rounding minutes and grace period settings. The relationship of these settings and their affect on times are described above.

Round the day

Rounding of the day is taking the exact elapsed minutes of work for a day, and rounding the results. The first option in this rounding method, "Select the rounding minutes..." ensures that no matter how much time was work, the results will always be rounded to that increment. Employee Tracker allows for settings of 0, 6, 10, 12 and 15.

There are two ways to round the total minutes for the day to the rounding minute increment, by zone or by grace period.

Zone type of daily rounding can be set so any time greater the value entered will round up. For example, a setting of "6:00" will make any total time worked less than six hours round down to the previous rounding increments, but any time worked which exceeds six hours would round up to the next rounding increment.

Grace period type rounding behaves in conjunction with the rounding minutes setting exactly as described above.

The next option outlines where any time adjustments due to rounding are to reflect. The possibilities are "All", "First" or "Last". Let's say we have a daily rounding setup with a 15 minute rounding minute setting, doing grace period rounding at a 5 minute grace. A scan at 7:06 would require 14 minutes be added to the total daily worked time. A setting of "First" here would tack that 14 addition minutes onto the first transaction of the day. Setting this to "Last" would tack those 14 minutes to the last transaction of the day. The "All" setting would average the additional minutes across the total transactions for the day.

The last daily rounding option sets "How many minutes...should elapse before overtime is approved" grants an employee pay for work after the shift stop time, barring the fulfillment of the user-defined limit.

Incidental Rounding Rules

The lower-left section of the Rounding tab contains a button which allows for definition of Incidental rounding rules, which allow for further tuning on how swipes are to be rounded. From the Incidental Rounding window, you can define rounding overrides Prior To Shift Start, After Shift Start, Prior To Shift Stop and After Shift Stop. Each section, if enabled, requires an amount of minutes prior or after the selected event in which these rounding overrides are applicable. If the employee scan occurs outside this window, the standard rounding rules defined on the Rounding tab are used. Below the definition of the event window are settings for the override rounding minutes and grace period. For example, your standard rounding rules may specify that IN scans are always bumped forward to the next rounding increment, but with the use of Incidental Rounding Rules, you can specify an override which allows for employees to be perhaps 2 minutes late from the shift start before they lose an entire 15 minutes from their day.

Daily Deductions and Additions

This tab allows for automatic time adjustments. There are five main parts:

Do you want to automatically DEDUCT time from shifts?

When checked, will remove the defined amount of time from a shift-worked total after the employee has satisfied a set amount of time. For example, a typical lunch deduction scenario would remove 30 minutes of time for every employee who works for 6 hours or more. If the employee works less than 6 hours, no auto deduction occurs.

Do you want to have a second automatic DEDUCTION of time from shifts?

Further, each rule can have a second automatic deduction. A common implementation of this would be to have another 30 minutes come off a shift if the employee works more than 12 hours in a day.

Do you want to have a third automatic DEDUCTION of time from shifts?

Finally, each rule can have a third automatic deduction. As with the first and second automatic deduction setup, the amount of worked time and the amount of time to deduct are required.

Do you want a MINIMUM LUNCH DEDUCTION for employees who SCAN for lunch?

The "Minimum Lunch Deduction" is used for employees who go for lunch and scan when leaving the work area. This option states that any scanned time out during the day should adjust to at least the set amount. For example, if an employee scanned out for lunch, then back in after 18 minutes, a minimum lunch deduction setting of 30 would remove 12 minutes of worked time to round the lunch to 30 minutes. A scan in excess of the minimum lunch deduction setting would further reduce the total worked time on a minute-by-minute basis.

Do you want to automatically ADD time to shifts?

The last adjustment option here allows for an addition of time to a worked-shift total after a set amount of worked time.

Daily and Weekly Overtime

This tab is divided into two sections, one for daily overtime and the other for weekly overtime.

Do you calculate DAILY overtime?

Standard distribution allows for the user to enter how, on a daily basis, time should be distributed. "After...hours/minutes allocate...to 1.5". The value entered here would represent the amount of worked time to be left in the regular time column. The next line down represents the amount of worked time to be left in the time and a half column, and likewise the third line represents time to be left in the double time column.

The first option below the distribution defines which absent codes are to be included in the daily overtime distribution. Not all payable absents may be applicable. Once checked, a button labeled [Specify...] becomes visible. Here the user can define the exact absent codes to include or not include.

The next option states whether statutory holiday pay is to be included in the daily overtime distribution.

The next two options deal with daily overtime approvals. If turned on, any overtime worked must be approved by the supervisor prior to becoming payable. Further, Employee Tracker allows for what's called a three-state approval process. Here, time is

not approved for overtime, or can be set to one of three approval states, approve all, approve from the start only, or approve from the stop only. Approving all lets any extra time, whether worked before the shift or after the shift, be paid. Approving from the shift start allows time worked prior to the shift to be approved for pay, but any extra time worked past the end of the shift is not and vice versa when approved for pay after the end of the shift. See the Edit Time and Attendance section below for more details on how to toggle these approval options.

Do you calculate WEEKLY overtime?

The weekly overtime side allows for definition of weekly (7-day) or bi-weekly (14-day) overtime periods. When turned on, the user can define how any overtime on the weekly or bi-weekly range should be distributed into each pay time column.

The first option below the distribution defines which absent codes are to be included in the weekly or bi-weekly overtime distribution. Not all payable absents may be applicable. Once checked, a button labeled [Specify...] becomes visible. Here the user can define the exact absent codes to include or not include.

The next option states whether statutory holiday pay is to be included in the weekly or bi-weekly overtime distribution.

The next option defines whether the weekly or bi-weekly overtime is to include the daily overtime distribution. Typical weekly or bi-weekly overtime only accumulates on regular hours. When this option is turned on, any time distributed by a daily setting would be included in the weekly or bi-weekly accumulations per column.

If the "...weekly...include daily overtime?" option is turned on, a sub-option becomes enabled. This option is labeled "Ignore Daily In Weekly For Stat Week". The activation of this option let's the user tune the inclusion of daily overtime in the weekly distribution to weeks that do not include a statutory holiday.

Starting with versions of Employee Tracker released in 2008, a new option is available to exclude transactions when a rule is not setup for weekly or bi-weekly overtime. In a typical environment, weekly overtime is distributed based on the first rule encountered during a week or bi-weekly region. These distribution details follow the entire region regardless of subsequent rules which may or may not be setup for weekly or bi-weekly overtime. But sometimes it is desirable to override a day or piece of work in a day to enforce time to be paid but explicitly excluded from the weekly overtime distribution routines. To achieve this, a new rule will be needed for these special occasions. The new rule must have the "Do you calculate WEEKLY / BI-WEEKLY overtime?" option turned off. This action turns on the new option to "Always disregard this rule for Weekly and Bi-Weekly overtime calculations". With this option on, for example, you can force time worked to distribute into regular time always for time segments attached to this rule, even if the worked time would normally be distributed into overtime based on the weekly or bi-weekly overtime achievements.

Last section on the weekly overtime side deals with anchoring for the 7- or 14-day period. If weekly overtime is specified, the anchor becomes a day of the week. If bi-weekly overtime is selected, the anchor becomes a certain date. When Employee Tracker performs it's bi-weekly calculations, this anchor date is used to determine the grouping of days into the bi-weekly regions.

Saturday, Sunday and Holiday Overtime

Here we define the daily overtime distributions for these special case days. The distribution portion is identical to the Daily overtime distribution described above. If the distribution of time on a Saturday, Sunday or Holiday does not differ from the standard daily overtime distribution, the user should enter the same amounts here as on the daily overtime section. Otherwise, the particular distribution needs per special case day can be defined.

Each of these special case days can also incur a logical override to the time allocation and distribution. The switches “Follow the above definition for any time which falls on a Saturday/Sunday/Holiday”. These options really only have bearing when an employees’ work time crosses a midnight barrier. Let’s say an employee started work Friday evening at 5:00 pm, and worked until 2:00 am Saturday morning. If we turned on the switch to follow the definition on Saturday, the time from 5:00 pm until 12:00 am would distribute based on the standard daily overtime distribution rules. But the time from 12:00 am until 2:00 am would distribute based on the Saturday special-case distribution rule.

Exceptions

The Exceptions tab contains three sections which can be setup to override certain behaviors in Employee Tracker

Do you want to over-ride the statutory holiday payroll export codes?

This allows for rule-level overrides during payroll exports on the earning codes used for allocation of statutory holiday time worked. The option, when enabled, allows for entry of the over-ride earning codes for Regular, Time and a half and Double time. There is further an option to ‘Accumulate’ or ‘Distribute’ the collected earnings. The ‘Accumulate’ option will collect and distribute earnings in the standard method. The ‘Distribute’ option does things a little different. With this option, the total time worked (regular + time and a half + double) is associated with the Regular earning code, and half the total time worked is associated with the Time and a half earning code.

Do you want to allow a window of time for split-shifts?

Some facilities may have rules which state that any time worked within a certain amount of time after the previous worked time is to be tied to the date of the initial time portion. This option allows for setting up a minimum amount of time between an OUT scan and an IN scan to bind the two time worked pieces to the initial time worked shift date. This has obvious implications in regards to daily overtime distributions.

What is the OVERTIME HOLIDAY DURATION differential?

An overtime holiday duration differential amount will reduce the weekly or bi-weekly overtime achievement levels by the amount entered for any weekly or bi-weekly region which contains a statutory holiday pay transaction. For example, an overtime holiday duration differential of ‘08:00’ with a weekly overtime level for regular time set to 40 hours will be altered to 32 hours of possible regular time if the week contains a statutory holiday transaction.

Advanced

The Advanced tab further allows for fine-tuning of some advanced options in regards to time and attendance calculations.

Do you want to automatically ADD time to shifts?

You may choose to automatically add time based on weekly achievements. When this option is on, you first enter 'How long does an employee have to work for the auto-ADDITION to occur?' which is the amount of time the employee must work in the week to be eligible for the weekly addition. The 'How much time do you ADD?' field is the amount of extra time added to the employees' week. Finally, you will need to set 'Which absent code do you want to use to pay-out the additional time?' which is how the extra time will be applied. **Note:** *the absent code you select to automatically add time on a weekly basis should be dedicated to this task only. Any use of the selected absent code in other areas of the application may cause the program to operate incorrectly.*

Is there a need for a Break-record based deduction?

Employee Tracker supports Break type records which are used to track paid-break time within a day. It may be desirable to place limits on the length of such breaks (typically these would be coffee breaks) and have any extra break time deduct from the paid work time segment. When you enable this feature, two items require setting. First, you must decide whether the rule applies to 'any ONE break record' or 'the total of ALL break records'. Now enter the maximum number of minutes per your previous selection. For example, if you set that any one break in a day cannot exceed 15 minutes and an employee takes a 20 minute break, they will have 5 minutes deducted from the paid time segment for that day.

Set a minimum calculatable amount of time?

In some scenarios you may want to have a minimum amount of time, for example for special call-in shifts where an employee is guaranteed 4 hours of pay as a minimum. You can define the minimum calculatable amounts either per transaction or for all transactions in a day.

Split Shifts

The lower-left section of the Advanced tab allows for entering of an amount of time in hh:mm format which will be used in comparisons between a worked time segments IN time and the previous time worked segments OUT time. If the difference between the two times is within this window, the second time-worked segment will be assigned the shift date of the previous segment.

Maximum pay hours per day

In contrast to the minimum calculatable time per day, you can also set a maximum amount of time permitted per day. This value cannot exceed 24 hours (for obvious reasons).

Tardiness Point Rules

If the Point System is enabled within Employee Tracker, a seventh tab is available which allows for definition of point assignments for various levels of tardiness against Shift Start, Lunch Start, Lunch End and Shift End events. For example, you can assign 1 point for an employee who arrives between 1 and 5 minutes late for the shift start, 2 points if between 6 and 10 minutes late, etc.

‘Advanced’ Time Calculation Rules

The Advanced time calculation rules further enhance most of the options available within the Standard rules, adding greater flexibility for facilities which may have more complex rules governing how time is calculated and distributed.

The Advanced time calculation rules are not enabled by default. To enable these rules, log into Employee Tracker as MASTER and follow the menu Utilities->Policies. From the left-side bar, select ‘Calculations’ and locate the policy titled ‘Advanced Time Calculation Rules’. Once active, you will need to exit Employee Tracker and log back in to ensure they are fully available. There is currently no method to convert Standard type rules into Advanced type, so great care must be taken if you have rules currently defined. Also note that the Advanced Rules do not make available all the options in the Standard rules. The options not available in the Advanced rules are specialty items which should not cause great negative impact.

As with the Standard rules, we will discuss each tab of a rule definition as an entity.

Rounding

Employee Tracker allows for two rounding methods: round the swipes or round the day.

Round the swipe time

The first option available when rounding the swipe times “If employees SCAN IN EARLY do you pay them for the additional time”, when checked, grants an employee pay for work prior to the shift start time, barring the fulfillment of the “How many minutes EARLY do they have to be?” setting which becomes available when early pay is permitted. This can be tuned to catch times which most probably are premature scans for the shift start.

The next couple of options detail the rounding of scan in and scan out times. Both the in and out rounding settings behave the same.

Rounding of a particular time of the day has two parts: the rounding minutes and a grace period. Rounding minutes are always divisible by 60, and options for 0, 6, 10, 12 and 15 are available in Employee Tracker. This setting states that any time of the day must fall on the rounding minute interval. For example, a setting of 15 for rounding minutes will ensure that the time is 0, 15, 30 or 45 (e.g. 7:00, 7:15, 7:30, or 7:45).

The grace period sets the direction of rounding for any intermittent value. The grace period extends a zone of time for the rounding increment in which any time caught gets rounded back to the previous rounding minute. Therefore the grace period can never exceed the rounding minutes.

For example, a rounding minute setting of 15 with a grace period of 5 would always round back swipe times 5 minutes after each increment. Therefore a swipe at 7:16 would round to 7:15. As well as scans at 7:17, 7:18, 7:19 and 7:20. But a scan at 7:21, which is beyond the grace period reach from the rounding increment, would round forward to 7:30. As would any scan up to 7:35!

The bottom option “If employees SCAN OUT LATE do you pay them for the additional time”, when checked, grants an employee pay for work after the shift stop time, barring the fulfillment of the “How many minutes LATE do they have to be?” setting which becomes available when late pay is permitted.

The lower left corner also has a button labeled Incidental Rounding Rules. These are further enhancements to the rounding described above, but are only effective for short durations of time near the start or stop of the transactional shift.

Incidental rules are broken down into four areas: rounding “Prior to Shift Start”, “After Shift Start”, “Prior to Shift Stop” and “After Shift Stop”. Each one can be enabled independently for customized rounding scenarios.

The first option on any of the four incidental rounding possibilities details how many minutes around the shift start or stop the incidental rule is effective for. The remaining options per incidental possibility are rounding minutes and grace period settings. The relationship of these settings and their affect on times are described above.

Round the day

Rounding of the day is taking the exact elapsed minutes of work for a day, and rounding the results. The first option in this rounding method, “Select the rounding minutes...” ensures that no matter how much time was work, the results will always be rounded to that increment. Employee Tracker allows for settings of 0, 6, 10, 12 and 15.

There are two ways to round the total minutes for the day to the rounding minute increment, by zone or by grace period.

Zone type of daily rounding can be set so any time greater the value entered will round up. For example, a setting of “6:00” will make any total time worked less than six hours round down to the previous rounding increments, but any time worked which exceeds six hours would round up to the next rounding increment.

Grace period type rounding behaves in conjunction with the rounding minutes setting exactly as described above.

The next option outlines where any time adjustments due to rounding are to reflect. The possibilities are “All”, “First” or “Last”. Let’s say we have a daily rounding setup with a 15 minute rounding minute setting, doing grace period rounding at a 5 minute grace. A scan at 7:06 would require 14 minutes be added to the total daily worked time. A setting of “First” here would tack that 14 addition minutes onto the first transaction of the day. Setting this to “Last” would tack those 14 minutes to the last transaction of the day. The “All” setting would average the additional minutes across the total transactions for the day.

The last daily rounding option sets “How many minutes...should elapse before overtime is approved” grants an employee pay for work after the shift stop time, barring the fulfillment of the user-defined limit.

Incidental Rounding Rules

The lower-left section of the Rounding tab contains a button which allows for definition of Incidental rounding rules, which allow for further tuning on how swipes are to be rounded. From the Incidental Rounding window, you can define rounding overrides Prior To Shift Start, After Shift Start, Prior To Shift Stop and After Shift Stop. Each section, if enabled, requires an amount of minutes prior or after the selected event in which these rounding overrides are applicable. If the employee scan occurs outside this window, the standard rounding rules defined on the Rounding tab are used. Below the definition of the event

window are settings for the override rounding minutes and grace period. For example, your standard rounding rules may specify that IN scans are always bumped forward to the next rounding increment, but with the use of Incidental Rounding Rules, you can specify an override which allows for employees to be perhaps 2 minutes late from the shift start before they lose an entire 15 minutes from their day.

Adjustments

This tab allows for automatic time adjustments. There are five main parts:

Do you want to automatically DEDUCT time from shifts?

When checked, will remove the defined amount of time from a shift-worked total after the employee has satisfied a set amount of time. For example, a typical lunch deduction scenario would remove 30 minutes of time for every employee who works for 6 hours or more. If the employee works less than 6 hours, no auto deduction occurs.

Do you want to have a second automatic DEDUCTION of time from shifts?

Further, each rule can have a second automatic deduction. A common implementation of this would be to have another 30 minutes come off a shift if the employee works more than 12 hours in a day.

Do you want to have a third automatic DEDUCTION of time from shifts?

Finally, each rule can have a third automatic deduction. As with the first and second automatic deduction setup, the amount of worked time and the amount of time to deduct are required.

Do you want a MINIMUM LUNCH DEDUCTION for employees who SCAN for lunch?

The "Minimum Lunch Deduction" is used for employees who go for lunch and scan when leaving the work area. This option states that any scanned time out during the day should adjust to at least the set amount. For example, if an employee scanned out for lunch, then back in after 18 minutes, a minimum lunch deduction setting of 30 would remove 12 minutes of worked time to round the lunch to 30 minutes. A scan in excess of the minimum lunch deduction setting would further reduce the total worked time on a minute-by-minute basis.

Do you want to automatically ADD time to shifts?

The last adjustment option here allows for an addition of time to a worked-shift total after a set amount of worked time.

Overtime

The Overtime tab allows for definition on how any paid time should be distributed through the Regular, Time and a Half and/or Double time columns.

The Region, Weekly and Independent Second Weekly overtime definitions share similar fields. First, they all contain 3 fields for defining the maximum amount of hours and minutes which should be accrued into the Regular time, time and a half and double time columns. You can also choose to include statutory holiday paid time as well as paid absent time. For absents, you can further define the specific absent codes which may impact the particular overtime type.

The 'All Columns' option defines whether the weekly overtime region is to include the daily overtime distribution. With this option turned off weekly or bi-weekly overtime only accumulates

on regular hours. When this option is turned on, any time distributed by a daily setting would be included in the weekly or bi-weekly accumulations per column.

Region Overtime

The Region Overtime section allows for definition of a user-defined overtime region in which hours are accumulated and distributed according to the specified limits. Region overtime can be 2, 3 or 4 weeks in length. A 2-week region would be equivalent to the bi-weekly overtime in the standard time calculation rules. Because these specialized regions can extend for multiple weeks, an anchor date is used during calculations and should be setup as a date when the multiple-week region would start. Employee Tracker will use this date when determining the number of days into a region any particular date occurs.

***Note:** The use of user-defined overtime regions has implications relating to the speed of calculations within Advanced Tracker software. Any 1 transaction being calculated could incur multiple weeks of look-back recalculations to ensure the distribution of the entire region is bound by the rules defined here.*

Weekly Overtime

The weekly overtime section contains no specific items and defines the overtime distribution rules for any particular week.

Independent Second Week

The Independent Second Week distribution contains no specific items, and is used primarily in a 2-week Region Overtime scenario when the overtime distribution between the first and second weeks have different distribution rules, allowing for very flexible overtime definitions.

Week start

Even when a rule does not use any sort of weekly overtime distribution, all Advanced Time Calculation rules require a starting day of the week which is used throughout the system for certain items like weekly transaction totals. Of course, when also making use of weekly overtime, this value is used as the week start for hours accumulations.

Daily Overtime

The Daily Overtime section is where the power of the Advanced Time Calculation rules can really be seen. Unlike the Standard rules which only allow for definition of a typical day with the three special overrides for Saturday, Sunday and Holidays, the daily overtime section in the Advanced rules can be setup for specific overtime on all 7 days of the week plus holidays.

The top part of the daily overtime window allows for selection of the days which this distribution applies to. Once you have defined how any special case days should be handled, as distribution rules can be setup as the Default which will apply to any days not specifically defined.

As with the weekly overtime variations, you can choose to include paid statutory holiday pay in the accumulations, as well as any paid absent time which applies.

The bottom section is where we define how the time should be distributed. There are five types of time in a day which can be acted upon for distribution.

Lapsed Hours type is the typical 'bucket' style distribution where a maximum amount of time is entered.

Time Of Day distribution allows for a particular zone of time to get special time distribution.

Work Before Shifts type allows for entry of a range of time before a shift starts when special distribution should occur.

Work After Shifts type allows for entry of a range of time after a shift ends when special distribution should occur.

Previous Day distribution allows for time which falls within a defined range from the end of the previous days' work to follow the defined special case distribution.

After selection of the type of distribution sub-set you would enter the **From** and **To** values corresponding to the selected distribution type.

Finally, select which column this distribution sub-set should fall into, being Regular, Time and a half, double time or double time and a half.

When multiple daily overtime distribution sub-sets are defined, it is necessary to ensure they are in the correct order for processing otherwise you may experience unpredictable results. The best practice is to order the sub-sets as you would expect them to occur in the day. The order of the sub-sets can be altered via the up and down arrow buttons to the right of the sub-set list.

Note: Some options are grayed out within the Daily Overtime window. These are still being worked on and will be ready in future versions of Employee Tracker.

Always disregard this rule Weekly and Bi-Weekly overtime calculations

Sometimes it is necessary to have rules which do not follow the weekly or region overtime distributions to which a day may be part. In these situations, a rule would be defined with this option turned on to force certain daily overtime distributions.

Exceptions

The Exceptions tab contains three sections which can be setup to override certain behaviors in Employee Tracker

Do you want to over-ride the statutory holiday payroll export codes?

This allows for rule-level overrides during payroll exports on the earning codes used for allocation of statutory holiday time worked. The option, when enabled, allows for entry of the over-ride earning codes for Regular, Time and a half and Double time. There is further an option to 'Accumulate' or 'Distribute' the collected earnings. The 'Accumulate' option will collect and distribute earnings in the standard method. The 'Distribute' option does things a little different. With this option, the total time worked (regular + time and a half + double) is associated with the Regular earning code, and half the total time worked is associated with the Time and a half earning code.

Do you want to allow a window of time for split-shifts?

Some facilities may have rules which state that any time worked within a certain amount of time after the previous worked time is to be tied to the date of the initial time portion. This option allows for setting up a minimum amount of time between an OUT scan and an IN scan to bind the two time worked pieces to the initial time worked shift date. This has obvious implications in regards to daily overtime distributions.

What is the OVERTIME HOLIDAY DURATION differential?

An overtime holiday duration differential amount will reduce the weekly or bi-weekly overtime achievement levels by the amount entered for any weekly or bi-weekly region which contains a statutory holiday pay transaction. For example, an overtime holiday duration differential of '08:00' with a weekly overtime level for regular time set to 40 hours

will be altered to 32 hours of possible regular time if the week contains a statutory holiday transaction.

Advanced

The Advanced tab further allows for fine-tuning of some advanced options in regards to time and attendance calculations.

Do you want to automatically ADD time to shifts?

You may choose to automatically add time based on weekly achievements. When this option is on, you first enter 'How long does an employee have to work for the auto-ADDITION to occur?' which is the amount of time the employee must work in the week to be eligible for the weekly addition. The 'How much time do you ADD?' field is the amount of extra time added to the employees' week. Finally, you will need to set 'Which absent code do you want to use to pay-out the additional time?' which is how the extra time will be applied. **Note:** *the absent code you select to automatically add time on a weekly basis should be dedicated to this task only. Any use of the selected absent code in other areas of the application may cause the program to operate incorrectly.*

Is there a need for a Break-record based deduction?

Employee Tracker supports Break type records which are used to track paid-break time within a day. It may be desirable to place limits on the length of such breaks (typically these would be coffee breaks) and have any extra break time deduct from the paid work time segment. When you enable this feature, two items require setting. First, you must decide whether the rule applies to 'any ONE break record' or 'the total of ALL break records'. Now enter the maximum number of minutes per your previous selection. For example, if you set that any one break in a day cannot exceed 15 minutes and an employee takes a 20 minute break, they will have 5 minutes deducted from the paid time segment for that day.

Set a minimum calculatable amount of time?

In some scenarios you may want to have a minimum amount of time, for example for special call-in shifts where an employee is guaranteed 4 hours of pay as a minimum. You can define the minimum calculatable amounts either per transaction or for all transactions in a day.

Split Shifts

The lower-left section of the Advanced tab allows for entering of an amount of time in hh:mm format which will be used in comparisons between a worked time segments IN time and the previous time worked segments OUT time. If the difference between the two times is within this window, the second time-worked segment will be assigned the shift date of the previous segment.

Maximum pay hours per day

In contrast to the minimum calculatable time per day, you can also set a maximum amount of time permitted per day. This value cannot exceed 24 hours (for obvious reasons).

Tardiness Point Rules

If the Point System is enabled within Employee Tracker, a seventh tab is available which allows for definition of point assignments for various levels of tardiness against Shift Start, Lunch Start, Lunch End and Shift End events. For

example, you can assign 1 point for an employee who arrives between 1 and 5 minutes late for the shift start, 2 points if between 6 and 10 minutes late, etc.

Shift Lunch Rules

The Time Calculation Rules are great for rounding of the first IN and last OUT punch in a day, but situations when the employee may be scanning out then back in for lunch may warrant extended rounding rules. These are called Shift Lunch Rules and these extensions to the shift definition allow for setup of specific rounding and minimums applicable only to the punches inside the day start and stop.

By default, Shift Lunch Rules are not enabled within Employee Tracker. To turn them on, log into Employee Tracker as MASTER and go to the menu Utilities->Customize Software. On the "General" tab, turn on the option "Shift Lunch Rules".

Now that the shift lunch rules are enabled, we can go into each shift and define how lunch rounding should occur. Under the menu Setup->Shifts, highlight a shift and click the [Edit] button. The actual Shift Lunch Rule settings are not displayed until the main Shift details are saved. Click the [Save] button and you should be presented with the setup page for this particular Shift Lunch Rules.

First, we need to define where within the shift the lunch should occur. This window of time we define as the lunch period can be equal to the shift start and stop times if a lunch could occur anywhere within the shift, or we could tighten the time of day when these rules would be implemented.

Now we can define the rounding minutes and grace period to use for rounding both the lunch start and lunch stop times. See "Round The Swipe Time" under Time Calculation Rules for a description on the usage of the rounding minutes and grace period.

The next option available is the "Minimum Lunch Duration". This is the least amount of time a lunch break should ever be. If we define the minimum to 30 minutes, and an employee takes a 22 minute lunch break, Employee Tracker will bump the lunch break up to 30 minutes automatically. Conversely, if an employees' lunch break exceed the minimum definition, that extra time would be deducted from the total worked time for the day, minute by minute.

We can further enhance the lunch taking scenario using the "Auto-deduct the defined Minimum Lunch if no lunch taken by the employee." In essence, if the employee does not leave for lunch, they get the automatic minimum deducted from their total worked time. An enhancement option to this switch is to define how long an employees' total worked time for a day must be before deducting the time.