TIMEFORCE HOLIDAY CHECKLIST

This document walks you through setting up each section of the software that is required in order for holiday hours to be awarded to your employees' time cards.

Holiday Checklist

- Make sure that your Holiday Lists have been updated for the current year.
- Make sure that your employees are assigned to the appropriate Holiday Lists.

Static and Dynamic Holidays

There are two types of holidays, "Static" and "Dynamic." A static holiday falls on the same day of the month every year. For example, Christmas always falls on the 25th of December. Independence Day always falls on the 4th of July. A dynamic holiday falls on the same week day of the month every year. For example, Labor Day always falls on the first Monday in September. Memorial Day always falls on the last Monday in May. Because the date on which dynamic holidays fall changes from year to year, even customers who have previously set up their Holiday Lists should double-check that their settings are correct.

Creating Holiday Lists

The Holiday List setup consists of two steps. First, you must create the list and define how you would like the system to handle paid holiday hours. You must then add the desired holiday dates to the list.

Inserting a Holiday List

1. Log into the TimeForce system as an administrator user.
2. Click on the main "Admin" navigation tab located at the top of the screen.
3. Click on the "Holiday Lists" link located under the **Policies** section of the screen.
4. From the main ''Holiday Lists" screen, click on the [ADD HOLIDAY LIST] icon. The "Holiday List Properties" screen opens.
5. Enter a name for this Holiday List, such as "Full Time Employees" or "2009 Holidays."
6. Put a check mark in the box next to each holiday rule that you would like to use, and specify the required settings.

Holiday rules are as follows:

✔ The "Will Holiday hours be generated?" option is selected by default. This will award your employee's with paid holiday hours on the days specified as holidays. With this option de-selected, holiday hours will not be automatically generated, but employees will still receive an accelerated rate of pay for hours worked on a day designated as a holiday.

✔ Put a check mark in the box if you would like holiday hours to count toward Hours Based accruals.
Example: Hours Based Accrual Polices award your employees with a specified number of accrued hours based on the number of hours worked. Would you like the system to consider "Holiday" hours as hours worked when calculating accrual totals?

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- ✔ Put a check mark in the box if you would like to award employees who work on days designated as a holiday with paid holiday hours in addition to the number of hours worked.

- ✔ By default, the system will award employees with the number of holiday hours specified in their employee profile. With the "Create holiday hours equal to worked hours" option enabled, employees will receive the same number of holiday hours as the number of hours worked on the holiday.
  Example: An employee works for 4 hours and 15 minutes on a day that is designated as a holiday. The employee will receive pay for the hours worked, as well as an additional 4 hours and 15 minutes of holiday pay.

- ✔ Put a check mark in the box if you would like holiday hours to count towards overtime.
  Example: An employee receives overtime after working 40 hours a week. When he clocks out from work on the day before a holiday he is at a total of 38 weekly hours. The next day 8 holiday hours are added to his time card. Should the system award 6 of the 8 holiday hours as overtime?

- ✔ If desired, enter a number of hours into the"Max Holiday hours to be awarded" field.

- ✔ If you do not want holiday hours to be generated, the "Holiday will create a Holiday Absence" option allows you to specify an absence code for holiday hours to be assigned to. Select the desired absence code from the drop-down menu.
  Note: Only absence codes with a type of "Holiday" will be available for selection in this field.

- ✔ Put a check mark in the box if you would like to use a Probation Period for this Holiday List. Put the number of probation days into the provided field.
  Example: Company policy states that employees are not allowed to receive paid holiday hours until they have been with the company for 90 days. "90" isentered into this field.

- ✔ Put a check mark in the box if you would like employees to receive an accelerated rate of pay for working on a day that is designated as a holiday. This option allows you to choose between two different ways of awarding employees with an accelerated pay rate. If you would like to award employees with a specified rate (such as "1.5" for time-and-a-half), select the **Holiday Rate** field, and enter the desired rate. If you would like to award employees with an accelerated rate of pay based on a Premium Pay Policy, select the **Premium Pay Code** Rate field and select the desired code from the dropdown menu.

- ✔ Put a check mark in the "Count holiday hours toward premium" option if you would like holiday hours to be counted in the "Premium" hours total on the employee's time card.

7. If you would like automatically generated holiday hours to be assigned to a specific department level, make the desired selection from the drop-down menu. Click on the icon at the end of the field to select the department from a map.

8. Click on the [FINISH/SAVE] icon to add the Holiday List.

Assigning Holiday Dates to a List

1. Each holiday list is shown on the main screen under the **Existing Holiday Lists** header. To add holidays to a list, click on the "Assign Holidays" link in the column to the right of the holiday list name.

2. Enter the **Date** on which you would like the holiday to occur. Click on the icon to the right of the field to select the date from a calendar.

3. In the **Holiday** field, enter a name for this holiday as you would like it to appear in the software.

4. If your employees are required to work any number of their previous scheduled shifts in order to receive holiday pay, put a check mark in the first **Employees must be scheduled** box and specify the number of shifts that employees assigned to this policy must work.

Example: Company policy states that employees must work their last 3 scheduled shifts prior to the holiday in order to receive paid time off. If the employee does not clock in for any one of the previous three scheduled shifts, no holiday hours will be awarded.

WARNING: Ensure that your employees are assigned to a schedule in the TimeForce software before using this option. This option should not be used by customers who do not use TimeForce scheduling. See the Software Procedures section of the "TimeForce Operator's Manual" for instructions on using schedules.

5. If your employees are required to work any number of their scheduled shifts *after* the holiday in order to receive paid holiday hours, put a check mark in the second **Employees must be scheduled** box and specify the number of required shifts that employees assigned to this holiday list must work.

Example: Company policy states that in order for employees to receive paid time off for a holiday, they must show up for their next shift scheduled *after* the holiday. If the employee does not show up for work on the next day after the holiday on which they are scheduled, no holiday hours will be awarded.

6. Click on the [ADD HOLIDAY] icon to add the date to the holiday list.

7. Remove dates from the holiday list by clicking on the icon in the column to the right of the holiday name.

8. By default the list will only display the holidays for the current year. Put a check mark in the ''Show All Holidays" field if you would like to see all holidays that have been inserted.

Click on the [HOLIDAY LIST MAIN] icon to return to the main holiday list screen.

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Assigning Employees to a Holiday List

Once you have created Holiday Lists you must assign your employees to the appropriate list. Holiday List assignments can be made in multiple areas of the software.

Employee Setup Wizard

The Employee Setup Wizard walks you through setting up your employee profiles stepby- step. See the TimeForce Operator's Manual for full documentation on Employee Setup.

1. Click on the main "Admin" navigation tab, and then on the "Employee" link located under the Personnel section of the screen. The "Employee Setup" screen opens.

2. Select the desired employee from the Active Employees drop-down menu and click on the "Edit/View" link.

3. The "Profile Information" screen opens. Click on the [NEXT] icon to continue.

4. The "Salary History" screen opens. Click on the [NEXT] icon to continue.

5. The "Address Information" screen opens. Click on the [SKIP] icon to skip this section of the wizard.

6. The "Pay Period and Department" screen opens. Click on the [NEXT] icon to continue.

7. The "Rounding and Premium Pay"screen opens. Click on the [NEXT] icon to continue.

8. The "Accruals" screen opens. Click on the [NEXT] icon to continue.

9. The next screen that opens is the "Holiday List" screen.

10. Select the desired Holiday List from the drop-down menu.

11. Enter the number of hours that this employee should be awarded with on days designated as holidays.

    Note: If an employee is scheduled to work on a day designated as a holiday, they will be awarded the number of hours for which they are scheduled. If an employee is assigned to a Pay Group, and is not scheduled to work on the holiday, the number of holiday hours specified in the Pay Group will be used. This setting is only used for employees who are not assigned to either a Schedule or a Pay Group.

12. Click on the [NEXT] icon repeatedly until you come to the final screen of the Setup Wizard, then click on [FINISH/SAVE] to save the changes that you have made.

Employee Profile

Holiday List assignments can also be made directly from the "Employee" section of the program. However, this method only allows you to specify the number of hours to be awarded when a Pay Group or Schedule is in use (See step #11 above).

1. Click on the main "Employee" navigation tab at the top of the screen.

2. Select the desired employee from the **Employee** drop-down menu.

3. Click on the "Pay Policies" link located in the row of links directly below the main program navigation tabs.

4. The employee's Holiday List assignment is located in the **Pay Policies** section in the upper right-hand corner of the screen. Select the desired **Holiday List** from the drop-down menu.

5. Enter the number of hours that this employee should be awarded with on days designated as holidays.

   Note: If an employee is scheduled to work on a day designated as a holiday, they will be awarded the number of hours for which they are scheduled. If an employee is assigned to a Pay Group, and is not scheduled to work on the holiday, the number of holiday hours specified in the Pay Group will be used. This setting is only used for employees who are not assigned to either a Schedule or a Pay Group. This option will not be available if the employee is assigned to either a Schedule or a Pay Group.

6. Click on the [SAVE] icon in the lower right-hand corner of the screen to save the changes that you have made.

Pay Groups

Pay Groups allow you to assign groups of people to the same pay policies. This can be useful when setting up union rules. See the "TimeForce Operator's Guide" for full documentation on setting up Pay Groups.

1. Click on the main "Admin" navigation tab at the top of the screen.

2. Click on the "Pay Groups" link located in the **Personnel** section of the screen. The main "Pay Groups" screen opens.

3. Existing Pay Groups are listed in the middle of the screen. To edit an existing group, click on the "Edit/View" link. To create a new Pay Group, click on the [ADD PAY GROUP] icon in the lower right-hand section of the screen.

4. The Holiday List setting is located near the bottom of the screen. Each Holiday List that you have inserted into the system is displayed. Select the list that you would like to assign to this Pay Group.

5. In the Holiday Hours field, enter the number of hours that employees assigned to this Pay Group should be awarded with on days designated as holidays.

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Note: If an employee is scheduled to work on a day designated as a holiday, they will be awarded the number of hours for which they are scheduled. This setting will only be used when employees are not assigned to work a schedule on days designated as a holiday.

6. Click on the [FINISH/SAVE] icon to save the changes that you have made. Once your Holiday Lists have been created, and your employees have been assigned to a list, the system will award your employees with paid Holiday hours.

Troubleshooting

If you are having trouble getting automatically generated Holiday hours to appear on employee time cards, use the following troubleshooting steps to correct the problem.

Recalculating Employees

Any changes that you have made to your company policies (including Holiday Lists) will not be applied on employee time cards until they have been recalculated.

Recalculating One Employee

1. On the main "Time Card" screen, select the employee that you would like to recalculate.

2. Click on the [RECALCULATE EMPLOYEE] icon located directly below the hours totals boxes in the lower right-hand corner of the screen.

Recalculating All Employees

1. From the main "Time Card" screen, click on **Daily Details** located in the row of links directly below the main program navigation tabs.

2. Click on the [RECALCULATE PAY PERIOD] icon located in the upper righthand corner of the screen.

Employee Pay Policies

Each employee that you would like to receive Holiday hours must be assigned to a Holiday List in the TimeForce system.

1. Click on the main "Employee" tab, and then on the **Pay Policies** link located directly below the row of main program navigation tabs at the top of the screen.

2. Select the desired employee from the drop-down menu.

3. The **Pay Policies** box appears on the right-hand side of the screen. Ensure that the correct **Holiday List** is selected, and that the desired number of **Holiday Hours** appears.

   Note: The Holiday Hours setting may not appear if the employee is assigned to a schedule in the TimeForce system.

4. Ensure that you save any changes made to the pay policies and recalculate the employee's Time Card.

Assigned Holidays

Your Holiday Lists must be edited to reflect the holiday dates that apply with each new year. It is recommended that you append your existing Holiday Lists at the beginning of each year (as opposed to creating entirely new lists from scratch each year).

1. Click on the main "Admin" navigation tab, and then on the **Holiday Lists** link located in the **Policies** section of the screen. Your existing Holiday Lists are displayed.

2. For the desired Holiday List, click on the **Assign Holidays** link. Each holiday date included in the list is displayed.

3. Ensure that the holiday to be awarded exists in the Holiday List. If it does not, add it by clicking on the [ADD HOLIDAY] icon and specifying the **Date** and **Holiday** fields.

   Note: The "Employees with Schedules" option should only be selected if employees are assigned to a schedule in TimeForce, and are required to work a specific number of days before or after the holiday in order for hours to be awarded.

4. If you have edited the Holiday List, ensure that you save the changes you have made and recalculate employee time cards in order to apply the changes that have been made.

Generating Holiday Hours

In order for holiday hours to appear on employee Time Cards, the Holiday List that they are assigned to in the system must be set up to generate hours for holidays.

1. Click on the main "Admin" navigation tab, and then on the **Holiday Lists** link located in the **Policies** section of the screen. Your existing Holiday Lists are displayed.

2. For the desired Holiday List, click on the link located under the **Name** column.

3. Under the option labeled "#2. Do any of the following rules need to apply..." ensure that the **Will Holiday Hours be Generated**? Option is selected.

4. If necessary, click on the [FINISH/SAVE] icon and recalculate employee Time Cards to apply the changes that have been made.

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Working on a Holiday

When an employee works on a day that is specified as a holiday in the Holiday List that they are assigned to, automatically generated holiday hours will only be awarded *in addition* to their worked hours if the policy is specifically configured to do so.

1. Click on the main "Admin" navigation tab, and then on the **Holiday Lists** link located in the **Policies** section of the screen. Your existing Holiday Lists are displayed.
2. For the desired Holiday List, click on the link located under the **Name** column.
3. Under the option labeled "#2. Do any of the following rules need to apply..." ensure that the **If You Work on a Holiday, You Receive Holiday and Worked Hours** Option is selected
4. If necessary, click on the [FINISH/SAVE] icon and recalculate employee Time Cards to apply the changes that have been made.

Probation Periods

The TimeForce system allows you to set up Probation Periods for Holiday Lists. An example of a standard Holiday Probation Period would be when an employee must be with the company for 30 days before they are eligible to receive paid holiday hours. Any employee who has not met the specified Probation criteria will not receive automatically generated hours for holidays. Ensure that your Probation Periods are set up correctly.

1. Click on the main "Admin" navigation tab, and then on the **Holiday Lists** link located in the **Policies** section of the screen. Your existing Holiday Lists are displayed.
2. For the desired Holiday List, click on the link located under the **Name** column.
3. Under the **Probation Period** check box, ensure that your settings are correct, and that the employee in question meets the specified criteria.
4. If necessary, click on the [FINISH/SAVE] icon and recalculate employee Time Cards to apply the changes that have been made.

Using Holiday Lists with Unscheduled Employees

The options on a Holiday List allow you to specify that your employees are required to work a set number of days before or after the scheduled holiday in order for automatic hours to be generated. These settings will prevent any employee who is not assigned to a schedule in the TimeForce system from receiving holiday hours.

1. Click on the main "Admin" navigation tab, and then on the **Holiday Lists** link located in the **Policies** section of the screen. Your existing Holiday Lists are displayed.
2. For the desired Holiday List, click on the **Assign Holidays** link. The dates included in this Holiday List are displayed.
3. For each holiday in the list, ensure that the **Before** and **After** settings are set to "No." If "Yes" appears, the holiday will need to be deleted from the list by clicking on the icon. The holiday can then be re-entered, ensuring that both **Employees with Schedules** options are not selected.
4. If necessary, click on the [FINISH/SAVE] icon and recalculate employee Time Cards to apply the changes that have been made.

Using Holiday Lists with Scheduled Employees

When using Holiday Lists in conjunction with Schedules in the TimeForce system, there are a couple things to keep in mind.

1. In order for holiday hours to be generated, employees must be scheduled to work the day specified as a holiday in the Holiday List.
2. The number of holiday hours that will be automatically generated is taken from the **Absence Hours** setting specified in the Schedule Rule that the employee's schedule is assigned to.
3. If the holiday is set up to require a set number of days worked before/after the holiday date, this criteria must also be met.

Checking the Absence Hours Setting

1. Click on the main "Schedule" tab, and then on the **Schedule Rules** link located directly below the row of main program navigation tabs.
2. Click on the Schedule Rule that the employee in question is assigned to.
3. Ensure that the **Absence Hours** setting contains the number of hours that you would like to be automatically generated on holidays.
4. If changes have been made, click on [SAVE], and recalculate the employee.

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Using Holiday Lists with a Combination of Both Scheduled and Unscheduled Employees

If a Holiday List is used with both scheduled and unscheduled employees, and if some or all of the holidays in the Holiday List require the employee to work a set number of days before/after the holiday in order for hours to be generated, TimeForce must be configured to ignore this setting for employees who are not scheduled.

1. Click on the main “Admin” navigation tab, and then on the **Settings** link located under the **System Tools** section of the screen.

2. Under the section of the screen labeled **System Setup**, click on the **Edit** link.

3. Browse to the **Schedule Settings** section of the screen. Ensure that the following setting is enabled: “Ignore Schedule Day Before and After on Holidays for Unscheduled Employees.”

4. Click on the [SAVE] icon if changes have been made, and recalculate the employee’s time card.

If you need assistance, contact Qqest Technical Support at 1-800-697-7010 from 6 a.m. to 6 p.m. Mountain Standard Time, Monday through Friday.

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