

The purpose of this questionnaire is to help us assist you in configuring your UKG Time Clock System. Please complete as much as possible and return it to your FrankCrum contact. A UKG team member will review the questionnaire with you over the phone to answer any questions you may have and schedule your training.

CONTACT INFORMATION

Company Name _____

Company Main Address _____

Company Main Contact _____

Phone _____ Email _____

TARGET DATES

When would you like to begin clocking in?

Date _____

When would you like to process your first “live” payroll?

Date _____

PAY PERIOD PROFILE (please complete all that apply)

Weekly Bi-Weekly Semi-monthly Monthly

Custom _____

Starts on: _____ Ends on: _____

Additional notes or comments

Tracking Time

1. How do you want to track your time?

- Web
 Mobile App
 Physical Clock

a. If mobile, do you want to restrict your employees' punches geographically, or by geo-fencing? If yes, provide address.

- Yes No
 List location(s) that need to be added.

b. If web, do you want to restrict your employees' punches on the network, by IP address? If yes, provide public IP address.

- Yes No
 List IP address(es) that need to be added.

2. Will the employees need to change between jobs/projects throughout the day? E.g. Employee works at one location, but after lunch needs to go to a different location to be tracked for job costing reasons.

- Yes No
 If yes, list cost centers:

3. Will you be tracking any type of bonus or commission (flat dollar amounts) within the time and labor management system?

- Yes No
 If yes, list all earning codes that apply.

Additional notes or comments

Schedules

1. Will you need schedules within UKG?

Yes

No

If yes, please provide a list of all schedules.

Holidays, Time Off and Overtime

1. Please provide a list of holidays you observe.

2. Which employees receive holiday pay? E.g. salaried employees, full time employees.

3. How many hours do you pay per holiday?

4. Is there a waiting period associated with holiday pay? E.g. 90-day probation period

Yes

No

If Yes, how many days? _____

5. Do employees receive a different rate of pay for working on a holiday? E.g., Employee receives double-time pay for working on the holiday.

Yes

No

If Yes, how many days? _____

<p>6. What happens if a holiday falls on a weekend? E.g. Paid on the weekday preceding or following.</p>	
<p>7. How do you currently calculate overtime?</p>	<p><input type="checkbox"/> Daily <input type="checkbox"/> Weekly</p>
<p>8. Does any time off count towards OT? E.g. sick, vacation, personal, etc.</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Additional notes or comments</p>	

Breaks and Meals	
1. What is the length of your normal lunch break?	
2. Should lunches be automatically deducted?	<input type="checkbox"/> Yes <input type="checkbox"/> No
a. If yes, how much time should be deducted?	
b. If yes, how many hours does the employee have to work in order for lunch deduction to occur? E.g. Must work a minimum of 6 hours to get 30 minutes deducted.	
3. Do employees clock out for breaks?	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. Do you pay any portion of their lunch?	<input type="checkbox"/> Yes <input type="checkbox"/> No
a. If yes, how much time do you pay?	
5. Do you pay any portion of their break?	<input type="checkbox"/> Yes <input type="checkbox"/> No
a. If yes, how much time do you pay?	
6. Please list any additional rules you apply to lunch periods.	
Additional notes or comments	

Rounding

<p>1. Do you currently round employee's time?</p>	<p><input type="checkbox"/> No</p> <p><input type="checkbox"/> Yes, at tenths per hour (ex. 8:06, 8:12, 8:18)</p> <p><input type="checkbox"/> Yes, at quarter hour (ex. 8:00, 8:15, 8:30)</p> <p><input type="checkbox"/> Based on employee's schedule</p>
<p>2. How many grace minutes would the employee receive? E.g. Round to the nearest quarter hour, up after 7 minutes.</p>	
<p>3. Should punches be rounded based on a schedule? E.g., If an employee's schedule is 9AM-5PM, but they clock in at 8:50AM, should their punch be rounded to 9AM?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>4. Should lunch punches be rounded as well?</p>	<p><input type="checkbox"/> No</p> <p><input type="checkbox"/> Yes, at tenths per hour (ex. 8:06, 8:12, 8:18)</p> <p><input type="checkbox"/> Yes, at quarter hour (ex. 8:00, 8:15, 8:30)</p>
<p>Additional notes or comments</p>	

Shift Premiums	
<p>1. Do you pay a premium for specific shifts? E.g., Hours worked between 11PM and 7AM are paid at a shift premium.</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>a. If yes, please list.</p>	
<p>2. Are premiums paid for working during the weekend?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>3. Please specify how premiums are paid if an employee works across the time boundaries of two different premium times. E.g., Shift II runs from 4PM-10PM. If an employee punches in at 3:45, should they be paid a premium?</p>	
<p>4. Please list any additional rules you apply to shifts.</p>	
<p>Additional notes or comments</p>	

Admin Access and Timesheet Approvals

<p>1. Who are the admins? E.g., Anyone that should have access to all employees and be able to process the payroll.</p>	<p>List admins:</p>
<p>2. Who will approve the timesheets (managers, admins, etc.)?</p>	<p>List timesheet approvers:</p>
<p>a. Do you want them to receive notifications when timesheets are ready to be approved?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Additional notes or comments</p>	