



Giving Employers Their Freedom Back

# Through Payroll & HR Services

Platform Features

## Introduction

This centralized resource shows how the different features across our human capital management (HCM) solution fit together within a cohesive, unified platform. You can quickly look through to see the full scope of what our HCM solution can do and learn about specific features within the product's modules.

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# HR Solution

## Talent acquisition

### Talent Acquisition\*

- Internal and external job requisitions
- Free and/or premium job board integration\*\*
- Configurable online applications
- Candidate self-service
- Pre-screening questions
- Knockout questions
- Resume parsing
- Applicant/interview notifications and tracking
- Background screening\*\*
- Work Opportunity Tax Credit (WOTC) service\*\*
- Recruiting insights\* (trends and visual metrics based on current workforce data)

## Talent management

### Compensation Management

- Job/position/cost center history
- Salary history
- Employee self-service: benefit statements
- Pay grades/steps
- Total compensation analysis
- Comprehensive add-on module available:\*
  - Compensation cycles with budget data
  - Worksheets for managers to model increases
  - Staff increases modeled and proposed by managers are routed and approved via configurable workflows
  - Merit Matrix links performance ratings to compensation

### Performance Management\*

- Performance development (continuous feedback and goals tracking)
- Configurable performance appraisals
- Definition and measurement of competencies, goals, core values
- Prior and current performance reporting
- Employee self-assessment
- Multiple manager assessment
- Workflow review

### Succession Planning

- Succession planning profiles
- Configurable talent matrix dashboard
- Succession plans reporting

### Trainings and Certifications Management

- Skills tracking
- Course management
- Certifications tracking

### Incident Tracking

- Case tracking/reporting and workflow
- Incident-based email notifications
- Supporting document storage
- Points tracking and escalation

### Attendance Management

- Requests and approvals for time off
- Attendance tracking

\* Requires additional module(s)

\*\* Service provided by 3rd party

## HR Solution (cont.)

### Asset Management

Company property management  
 Vehicle management  
 Insurance and warranty-related contracts

### Offboarding

Termination details/history/checklist  
 Exit interview  
 Notifications of termination  
 COBRA elections/refusals  
 COBRA administration\*\*

## Human resources management

### Onboarding

New hire checklist/welcome/workflow  
 Personal information  
 I-9 submission/signoff/E-Verify\*\*  
 W-4 election/submission  
 Employee self-service: benefits overview and enrollment  
 Property allocation  
 HR document and forms creator (custom forms)

### Benefits Administration

Employee self-service: benefits overview and enrollment/open enrollment/life event enrollment/auto-enrollment  
 Defined benefits eligibility  
 Benefits-driven payroll deductions  
 Carrier connections and forms\*\*  
 Effective date benefit plans  
 Evidence of insurability

### Position Management

Position creation  
 Position budget setup  
 Position assignments  
 Integrated budget versus actual tracking  
 Position audit reports  
 Set defaults at the Position or Job level

### Compliance

New hire reporting  
 Notifications regarding date expirations  
 EEO reporting  
 Vets 100 reporting  
 Workers' compensation injuries/claims management  
 OSHA reporting  
 Affordable Care Act (ACA) management\*

### HR Resources

Document storage  
 Document retrieval tracking  
 Employee directory  
 Employee self-service  
 Organizational charts  
 Company events and news  
 HR documents and forms creator (custom forms)

### Mobile Application

Benefits enrollment  
 Applicant portal

\* Requires additional module(s)

\*\* Service provided by 3rd party

## Timekeeping Solution

### Labor Management

Employee/manager self-service

Timesheet approval workflow

Mass edit capabilities

Import/export utility

Exception handling

Document storage (receipts, company handbook, etc.)

Automated points tracking (attendance trends)

Temporary manager (backup) assignment

Itemized expense tracking

Employee self-service time off request tool and manager approval workflow

Time-off planning

Open absences/Bradford factor scores for absence tracking

### Accruals\*

Tracking of Eligibility, Tenure, Hours Worked

Synching with External HR or Payroll Systems

### Scheduling

Daily, weekly, or configurable recurring patterns

On-the-fly entries/edits for day-to-day changes

Dynamic time off durations based on scheduled hours

Visibility into employee timesheet

Assign employees to schedules or schedules to employees

Assign two schedules per employee per day

View schedule, location, department, job, etc.

### Pay Rules

Location

Cost center (nine cost centers with up to 10 levels each)

Shift differentials

Pay rule priority

Autopopulated holidays

Multiple pay periods (weekly, monthly, etc.)

Time zones

Non-standard pay periods

Employee contract-based pay rules

Automatic deductions (breaks, meals)

Paid meals

Annualization tracking

Flat pay

Extra time and guaranteed minimum time

Grace and rounding

Holiday pay

Overtime

### Rate Tracking

Job costing

Pay categories (such as direct, indirect)

Multipliers, special rates

Effective dating

Counter value calculations

Piece rate quantity tracking (units, miles, etc.)

Pay rate per piece/piece rate requirements

\* *Accruals is an add-on module.*

## Timekeeping Solution (cont.)

### Reports

- Over 50 built-in standard reports
- Custom/ad hoc reports
- Ability to export to five formats (CSV, Excel, PDF, HTML, XML)
- Daily email summary report
- Saving and sharing reports with quick link access
- In/out dot board
- Exception reporting
- Time off calendar and roster
- Dynamic drill-down capabilities
- Security profile settings for defining access
- Points history
- CMS submission

### Mobile Application

- Timesheet (completion, submission, correction, manager approvals)
- Accruals (balances and history)\*
- Schedule
- Time off requests (submission, balances, history, manager approvals)
- Overtime requests
- Time off calendar
- Punch in/out
- Offline punch
- GPS punch tracking/geofencing
- Job/cost center transfer
- Piecework collection
- Reports access (read only)
- Employee attendance tracking

### Data Collection

- Ethernet-based clocks
- Mag stripe, proximity, and bar code badges
- Biometric verification and identification
- Remote hardware management
- Remote punch via mobile app

### Security

- Permanent, detailed audit trail
- IP address and/or punch restriction
- Application manager/user access profiles
- RSA login authentication
- Single Sign-On (SSO)
- User/manager configurable user interface
- Virtual code authentication

### Email Notifications (alerts, reminders, etc.)

- Standard time off request, rejection, and approval
- Standard timesheet request, rejection, and approval
- Beginning and end of period manager/employee notifications
- Accrual balance notifications\*
- Exception notifications
- Point notifications
- Companywide announcements

\* Accruals is an add-on module.

## Payroll Solution

### Payroll Process

- Built-in test environments
- Calculations as you go
- Payroll prep checklist and quick links
- Correction delta process for easy recalculation of payroll edits
- Custom batch payroll entry screen
- Direct deposits
- Gross to net
- Pay stub printing/distribution
- Payroll alerts
- Payroll batches by pay frequency
- Real-time payroll processing
- Reconciliation pay statement

### Payroll Reporting

- Change history reporting
- Consolidated reporting across tax IDs
- Cross-year reporting
- Date-driven reporting across all years
- Excel® native reports
- Integrated report writer
- Reports sent by email
- Standard report library
- 401(k)/retirement plan 180° integrations\*\*

### Payroll Setup

- Geospatial tax identification
- Labor distribution and cost center tracking
- Multi-EIN support

### General Ledger/Year End

- Automated reciprocity tax withholding
- General ledger processing
- Year-end processing

### Outsourced Payroll Services\*\*

- Check printing/distribution
- Employee direct deposit
- Tax filing/deposits
- Tax filing/payment
- Garnishment disbursement

### Benefits Administration

- Benefits and insurance management\*
- COBRA administration\*\*
- Leave request management\*
- Total compensation statement
- Workers' compensation
- Affordable Care Act Form 1094-C\*

### Platform and Security

- Profile-based functionality security
- Unlimited users with security
- Automated event notifications
- Third-party software interfaces
- Unlimited data storage

### Mobile Application

- Direct deposit/electronic consent
- View pay statements, W-2s, and 1099s

\* Requires additional module

\*\* Service provided by 3rd party

# Scheduling Solution

## Build

Workload planning\* — automatically generate shifts based on imported business data

Optimized schedule generation — take a step beyond simply meeting constraints and achieve business goals such as lowering cost, reducing overtime, meeting employee preferences and much more,

Budget and workload definition

Shift and schedule definition

Schedule rule and constraints definition

Manual schedule planning and editing

Schedule pattern templates

## Fill

Schedule groups or individuals

Schedule to skill and proficiency

Open-shift visibility

Automatic shift assignment — have the system automatically assign shifts based on several important factors such as availability, skills, location, and much more

Color-coded availability

Drag-and-drop fill

## Mobile Application

View schedule

Swap shifts (peer approvals available)

Coverage requests

Open shift requests

## Manage

Schedule change alerts and notifications

Skill tracking

Credential and certification tracking\*

Staff management drag-and-drop shift transfer

Call list

Employee availability and preferences

Fatigue management

Open-shift management — automatically displays the available employees who meet shift criteria, allowing the shift to be offered and accepted by those employees within a predefined time frame

Employee self-service: request coverage

Employee self-service: shift swap

Employee self-service: request open shift

Timesheet sync\*\* — ensure schedules are posted to employees' timesheets

Employee self-service: approve schedule changes (where secure scheduling ordinances apply)

## Measure

Reporting

Coverage graph and metrics

Detailed audit trails

Planned-to-actual schedule metrics

## Notifications

Schedule changes

Shift swap requests

Coverage requests

Open shifts posted

Open shifts requested

*\*Add-on functionality required*

*\*\*Applicable only if the Timekeeping module is being licensed*



# Accruals Solution

## Prerequisites: Requires Timekeeping or Payroll modules

### Accrual Settings

System-maintained values — accrual balances will be calculated automatically in system

User-maintained values — accrual balances will be manually updated by the system administrator

Imported values — accrual balances will be calculated externally and imported to the system on a regular basis

Tenure changes — will be shown if tenure changes in the middle of an accrual period

Maximum accrued amount (per accrual year) — maximum hours that can be accrued based on tenure

Maximum running balance — maximum balance that an employee can have at any given time

Balance move — move any excess accrued amounts to a specific bucket

Utilization — order in which different time-off buckets are used

Accrual day — first or last day of month

New-hire accruals — when and how much a new hire starts accruing his or her first month

Sick time compliance

Waiting period schedule — schedule on which an employee will accrue after the waiting period settings have been reached

Processing accruals — amount and frequency accruals are calculated (automatically, manually, individual users, multiple users, all users)

Accrual termination — allows for multiple options to pay out accrual balances upon termination of an employee

### Benefit Accrual Profiles — determines the rate at which an employee accrues benefit time

Default — applied to all new employees added in system

Tenure

Hours worked

Points

Waiting period

Carryover settings

### Accrual Management

Modify accrual balances

Zero out accrual balances

Import accrual balances

Modify employee hours taken

Test accruals

### Notifications

Negative balances

End of a waiting period

### Employee Self-Service

View accrual balances

Request time off — automatically updates accrual balances

Time-off balance report

### Mobile

View accrual balances

Request time off

Approve time off

### Payroll\*

Calculate accruals in payroll based on hours worked

Display accrual balance on pay statement

*\*Requires Payroll module*

# Attestation Solution

## Prerequisite: Requires Timekeeping module

### Device Support

Kronos InTouch® time clock

Timesheet clock

Web clock

### Workflows

Attestation questionnaire

Attestation manager change request

Cascading prompts when responses may trigger follow-up questions or requests

Generation of email to employees or managers notifying of to-do item

### Employee Actions

Attestation approval

Attestation rejection

Cancel/postpone attestation

Cancellation/postponing of attestation — Note that can reject or approve

Reason code included

### Employee Prompts

End of shift (daily)

Timesheet submission

Configurable questions

Configurable response choices

At every punch — requires custom configuration

### Reports

Attestation audit report

Attestation summary report

Attestation summary dashboard widget

### Notifications and To-Dos

Missed attestation to-do

Rejected attestation email notification

Approved attestation email notification

# ACA Management Solution

## Prerequisites: Requires Timekeeping or Payroll or HR modules

### Measurement Periods

Initial measurement configuration — measurement, administration, and stability periods

Standard measurement configuration — measurement, administration, and stability periods

### Compliance Alerts

Minimum value plan offered\* or \*\*

Affordable plan offered\* or \*\*

### Notifications

ACA benefits enrollment\* or \*\* — sends email when the ACA status changes to full-time in order to offer benefits enrollment

ACA predicted status change — sends email about a possible upgrade or downgrade in employee status

ACA status change

Projected change in status

Current benefit plan\* or \*\*

### Reports

Employee ACA status — all employees and their assigned ACA profiles

ACA data detail — each employee and his or her detailed ACA history for the selected date range

ACA data summary — total amounts for the selected date range within each affected ACA field

Ad hoc reports

Imports — pull ACA timeline information into system

Form 1094-C employee count — drill down into the numbers reported on Form 1094-C Part III

ACA account status change history — list of changes in status for each employee

### Widgets/Views

ACA timeline widget — employee numbers and settings for each month

ACA timeline exceptions widget — force calculation exceptions as of a certain date

ACA summary widget — summary of ACA data for an employee

ACA compliance overview widget — customizable view of ACA data

ACA employees status history widget — lists all changes in dates of service for each employee

### Calculations/Profile Rules

Future possible downgrade to part-time

Future possible upgrade to full-time

Monthly hours from payroll\*\*

Monthly hours from timesheets\*\*\*

ACA status

Minimum value plan offered\* or \*\*

ACA profile effective date

Support for nonvariable-hour EE waiting period

Benefit profile configuration\* or \*\*

Break-in-service rule support

COBRA tracking

*\*Need HR module*

*\*\*Need Payroll module*

*\*\*\*Need Timekeeping module*

## ACA Management Solution (cont.)

### IRS Forms — autopopulated with information tracked in system or imported

1094-C

1095-C

Employee self-service view of the 1095-C form

Mass population of 1095-C forms

Mass editing of form fields

### Year-End Processing

Year end process checklist

Final forms

Form delivery — electronic and hard copy to employees

Format forms to file — AIR submission (e-filing) or paper

Break-in-service rule support

Corrections — AIR correction and replacement formats supported

# Leave Management Solution

**Prerequisites: Requires Accruals with Timekeeping or HR modules**

## Request Management

Leave of absence requests

Approval of requests

Rejection of requests

Management of requests

Modify balances

Modification of balances — Employee self-service

Leave of absence workflow — customizable configuration

Qualifier questionnaire

## Views

View history

View balances

Leave of absence calendar

Entitlement based on leave profile

Global entitlement report — employee entitlement amount, what has been taken, balance, type of leave, entitlement as of date, taken as of date

Ad hoc reports

## Manager Tools

View leave requests for any employee

View leave cases for any employee

Add new case

Close existing case

## Mobile

Request leave of absence

Approve requests

Reject requests

## Compliance

Continuous leave tracking

Intermittent leave tracking

Automated tracking of leave eligibility, including the hours worked eligibility criteria rule, type, and duration

Automated notifications

Department of Labor forms

## Leave Administration

Leave profile configuration

Populate timesheet from leave case\*

Append HR documents directly to an employee's case record

Permissions — determine what functionality employees or managers have

Department of Labor forms

*\*Need Timekeeping module*

## Cross-Platform Features

### Marketplace\*

- Self-service apps from 3rd party providers expanding the platform's functionality, such as G Suite for Google Cloud and Certify

### Employee Perspectives

- Delivers an at-a-glance view of employee data that can serve as a scorecard of key employee metrics

### Mobile App

- Compatible with Apple and Android devices
- Download free from your device's app store

### analytic.li

- Preferred people analytics partner
- Pulls, transforms, and builds on data from our HCM solution to show how talent impacts business for historical, current day, and predictive insights
- Dashboards for stakeholders across the organization — Executive Overview, Human Capital Investment, Workforce Planning, Talent Overview, Time & Labor, Wage & Benefit, Talent Acquisition

