SMART systems Time Tracker

* not all items are required for use

1. **TimeTracker will use starting information based on what is in SMART HR currently**
   - *Active employees from Payroll/Personnel*
   - *Active Pay Codes from Payroll*
   - *Active TimeOff Plan/TimeOff Reason combinations from TimeOff*
   - *Active locations from Payroll*

2. **As employees are hired and terminated in SMART HR, it will automatically adjust TimeTracker.**
   - *New hire will build employees assigned to a group and basic defaults OR can be copied from another employee. It will also assign them to a location.*
   - *Rehire will automatically build the new location in TimeTracker.*
   - *Terminate will automatically stop all of the employee's TimeTracker settings. It will also delete any future dated items and notify if the employee is currently an active supervisor for employees.*

3. **TimeTracker Settings will be setup in SMART HR**
   - **Clock Setup**
     - *Expensive, physical clocks are not needed…just a web browser.*
     - *IP Addresses can apply to clocking restrictions*
     - *Tracking of actual time or rounded time can be chosen*
     - *Pay codes can be assigned descriptions employees will understand*
     - *One pay code can have many descriptions*
     - *Automatic breaks can be setup to be taken automatically after a certain amount of time.*
     - *Early restriction rules apply only to the first clock in of the day. If an employee works more than one job, it does not apply to the second clock in or if an employee leaves the building for an appointment and clocks back in. **Example:** Employee clocks in at 8:00 am, leaves for an appt at 9:00 am, then tries to clock back in at 10:00 am, they will be able to.*
     - *Split Schedule will automatically split out an employee's time at the end of the day into the schedule segments setup (as long as consecutive) with only one clock in and clock out.*
     - *Schedule exceptions can be setup to pay if a person works more than what they are normally scheduled to work.*
     - *Many other pay setup options…*

   - **TimeOff Request Setup**
     - *Not all TimeOff Plans/Reasons need to be allowed in TimeTracker. Customizable by district.*
     - *Districts can assign employee friendly descriptions to help employees know what they are choosing.*
     - *TimeOff Codes can be setup to not allow negative usage.*
     - *It can be setup to require a specific increment length, minimum increment, or both.*
     - *Employees and Supervisors will see the current balance from SMART HR, Approved and Submitted in TimeTracker.*
     - *Many other TimeOff setup options…*

Time Tracker

- ***Timesheets***
  - ○ *Can be entered manually day by day*
  - ○ *Can be populated based on a schedule.*
- ***All***
  - ○ *Employee groups can be created if helpful.*
  - ○ *Employee groups can be setup to specific locations.*
    Example: Teacher could be the group. Elementary, Middle and High School could be defined as locations if needed for approval.
  - ○ *Future TimeOff Requests and Timesheets can be restricted to a certain number of days.*

4. **Employees can enter information directly from the Home page in SMART eR**
   - *Employees do not need to fully login to SMART eR to clock in/out, unless they would like to, then they could continue to SMART eR after clocking. Employees will only see the clock if it applies to them.*
   - *Employees can enter TimeOff requests, but only if they are allowed to.*
   - *Negative Usage can be stopped for an employee entering a request; but a supervisor can enter it.*
   - *Current TimeOff balances will display to know the impact prior to entering a request.*
   - *Employee approval can be required prior to supervisor approval.*
   - *They will receive notifications automatically if something needs to be done.*
   - *They can view statuses of their requests at any time including history.*

5. **TimeTracker Management in SMART eR**
   - *Many role choices for access to TimeTracker: Payroll, Admin, Approver, Editor, View only, etc.*
   - *Supervisors can view TimeOff requests of employees in a calendar or list option and also enter on an employee's behalf.*
     - ○ *They will be able to see current TimeOff balance information prior to approving a request.*
     - ○ *They can adjust an approved TimeOff request until it is processed.*
   - *Supervisors can approve time/TimeOff Requests as they are entered, or be required to approve in a specific order.*
   - *Reminder notifications to Supervisors and Employees can be setup to send automatically.*
   - *Quick links available from a supervisor's dashboard.*
   - *Proxy options if someone on a long vacation or extended leave.*
   - *Third party leave can be imported into TimeTracker if it needs to be added into the OT calculation or pay.*

6. **Close Period**
   - *Can close TimeOff or TimeOff and Hours together.*
   - *Closed data can be automatically moved in the TimeOff Import for usage and comp time.*
   - *Closed data can be automatically moved in the Timecard Import.*
   - *Closed data can be automatically moved in the ACA Hours Import.*