

Update Salary Records

Any employee who will no longer be exempt from overtime will need to have a new Position and Salary record created. This will be added under the tabs Employee > Position and Salary. The new record will reflect the **Pay Type** as “Non-Exempt Salary.” The screenshot below shows the criteria you will need to update.

Position And Salary							Add Position and Salary
Effective Date	Position	Pay Type	Pay Rate	Pay Interval	Change Reason	Base Pay Code	
▶	Salaried Worker	Non Exempt Salary	\$0.00	Annually	Hire	Salary	

1. Click on the **Add Position and Salary** button.
2. Set the **Effective Date** to the start of the pay period that ends on or after November 30th.
3. Set the **Pay Type** to “Salaried (Non Exempt).”
4. Enter a **Change Reason** (this is required).
5. Choose **Save**.

Ensure Overtime Policies are applied

Policy Group assignments may need to be adjusted as well. Ensure the Salary Non-Exempt employees are associated with a group which includes Overtime. Policy Groups can be added or adjusted under the tabs Admin > Personnel > Policy Groups.

Policy Groups			
Name	Pay Period	Department	Supervisor
Default	Weekly	Dep3	✗
Full Time	Bi-Weekly	Dep1	✗
Part Time	Bi-Weekly	QA	✗

Add

1. Select the Policy Group where affected employees are tied.

Policy Group Data

Name: Full Time
 Pay Period: Bi-Weekly
 Supervisor: Use Employee Current Supervisor
 Department: Dep1
 Comp Time Policy:
 Last Calculated:
 Overtime Week: Monday-Sunday
 Multiple Week Overtime Start Date:
 Time Zone:

Employees

Department Filter: Allowed Schedule
 All Departments

Unselected: 21 | Selected: 8

Admin, Clock	FT-Allen, Thomas
Branch, Rick	FT-GANDHI, SHREYAS
Brown, Joe C	FT-GAURAV, SHETH
Castle, Richard	FT-Howard, Robert
Clark, Don R	FT-Jazayerli, Sam
DALAL, AMISH	FT-Jones, Jon B
Darleth, August	FT-Keller, Ron
Ely, Mike	FT-Kelly, David
Gorman, Vinnie O	
Lovcraft, H.P.	
MILIND, GOLU	
mobile, iphone	

Quick Search: Search
 First: Id:
 Last: Card:

- Highlight the employees you wish to move to the new Salary Non-Exempt group and use the << keys to move them to the unselected category.
- Click the **Assign-UnAssign Policies** button to move the employees out of the group.
- Click the **Update** button once the status bar as completed.
- Click on your Salary Exempt Policy group.
- Highlight the names of the employees you wish to move into the group and use the >> keys to move them into the selected category.
 - You may not have a Salary Exempt Policy group, which means one must be created.
- Click the **Assign-UnAssign Policies** button to save your changes.

Enable Access for Time Clock Punches

Any affected employees may need to be given the ability to track their hours. If your company uses a physical time clock to collect punches, you will need to add a card number to the affected employees which allow them to clock in and out using that physical time clock. The card number for the employee can be added under Employee > Employee Main.

- Select the employee's name from the drop down list.
- Add a numeric only card number to the employee.
- Choose **Update Employee** to save changes.

Note: If you are using a Biometric clock, the employee will need to be enrolled.

TIME CARD MY SCREEN REPORTS CLOSE PAY PERIOD **EMPLOYEE** SCHEDULE CLOCKS JOB TRACKING ADMIN

• Menu → Employee Main • Position And Salary • Pay Policies • Employee Schedule • Error Monitoring • HR Info • Accruals • Comp Time • Discip

Employee ◀ ▶ Status: Active Clear Filter

New Employee Update Employee

Required Information		Photo
Salutation	<input type="text"/>	Photo
First Name	<input type="text" value="JESSICA"/>	
Middle Name	<input type="text"/>	
Last Name	<input type="text" value="DAVIS"/>	
Employee Id	<input type="text" value="01180"/>	
Card Number	<input type="text" value="1180"/>	
Hire Date	<input type="text" value="7/11/2016"/>	
Status	<input type="text" value="Active"/>	

Demographics

New Employee Update Employee

Enable Access for Self-Service Punches

Any affected employees may need to be given the ability to track their hours. If you would like the affected employees to collect their time via self-service punches you will need to ensure they have self-service security access. The self-service security can be added under Admin > System Tools > User Security.

Note: Some users may already have user security access; others may need access created. Below are the steps to creating new access.

1. Choose **Add User**.
2. Select "Employee" from the **Security Role** drop down.
3. Enter a **Username**.
4. Select the employee's name from the **Employee** drop down.
5. Set and confirm the password.
6. If necessary, check the **Require Password Change**.
 - a. This will allow the employee to change their password upon login
7. If your company observes **Daylight Savings**, check the box.
8. Select the **Add** button at the bottom of the screen.

Accrual Policy

We recommend double checking accrual policies assigned to the affected employees to ensure proper policy assignment.

Exporting Hours to Payroll

Note: If you have restricted Pay Codes or Employee Types within your payroll export, you'll need to update these settings. This can will be adjusted under the tab Close Pay Period > Export Templates.

Export Template

Name	<input type="text" value="Payroll Export"/>	
Payroll Software	<input type="text" value="Infinisource - iSolved Payroll"/>	
Company Default	<input type="checkbox"/>	
Saved Filename	<input type="text"/>	<small>(without the extension) Leave blank to use the default filename</small>

Custom Fields

Types of Employees to Export	All Employee Types <input checked="" type="checkbox"/>
Types of Pay Codes to Export	All Pay Codes <input checked="" type="checkbox"/>

Types of Employees to Export			
Employee Type	Hourly	Exempt Salary	Non Exempt Salary
Full Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
On Call	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Part Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seasonal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Temporary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unspecified	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Types of Pay Codes to Export			
	Hourly	Exempt Salary	Non Exempt Salary
Base Pay Codes			
Absence	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Holiday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PTO	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Salary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sick	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unpaid Absence	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vacation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Worked	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overtime Pay Codes			
7 Day Consecutive	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7 Day Consecutive Double Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Daily 8	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Daily After 12	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>