

TIMEFORCE II 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 the Holiday date has been set up in the system.
- Make sure that your employees are assigned to the appropriate Holidays.

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 Holidays should double-check that their settings are correct.

Creating Holiday Lists

Insert each Holiday into the program, and define how you would like the system to handle paid Holiday hours.


1. Log into the program as an administrator user.
2. Click on the main "Admin" navigation tab located at the top of the screen.

3. Click on the "Holiday" link located under the **Policies** section of the screen.
 4. Click on the [ADD] icon in the lower left-hand corner of the screen.
 5. Enter the Name of this Holiday, as you would like it to appear in the program.
 6. Specify the Recurrence of this Holiday. The first option is used for static Holidays (Holidays that fall on the same month and day of the year) The second option is used for dynamic Holidays (Holidays that fall on the same day of the month each year). The third option is used when you *do not* want this Holiday to recur from year to year.
 7. The **Pay Codes** section applies to hours that employees work on the Holiday date. Specify the "Base Pay Code" to be applied to worked hours, and any additional "Premium Pay Codes."
 8. The final section on the screen allows you to specify some rules which define how automatically generated Holiday hours are to be handled by the system.
- Select "Generate Hours" if you would like the system to automatically generate Holiday hours for employees assigned to this Holiday. With this option un-checked, no other Holiday rules apply.

- The “Use Scheduled Hours” setting tells the system to award hours based on the number of **Absence Hours** specified in the Shift Policy that the employee’s schedule is assigned to. With this option un-checked, the “Awarded Holiday Hours” setting is used.
 - “Awarded Holiday Hours” allows you to define the number of hours awarded to employees on the Holiday.
 - Select the “Receive Holiday and worked hours” option if you would like employees who work on the Holiday to receive both their worked hours, and the automatically awarded Holiday hours. With this option un-checked, the automatic Holiday hours will be overridden when the employee clocks in on the Holiday.
 - Put a check mark in the box if you would like to use a “Probation Period” for new employees before this Holiday goes into effect. Enter the number of probation days into the provided field.
 - Select the “Base Pay Code” that automatically awarded Holiday hours are to be assigned to.
 - If your employees are required to work any number of their scheduled shifts before or after the Holiday date in order to receive paid Holiday hours, put a check mark in the “Require Prior Shifts” and “Require Following Shifts” settings. Specify the required number of shifts in the fields provided.
9. If you would like to assign hours for this Holiday to a **Department**, click on the “No Department” link and select the desired department level from the tree-directory.
 10. Click on the [CREATE] icon to save the Holiday.




Assigning Employees to Holiday Policies

Holidays are assigned to employees on an individual basis from the **Pay Policies** section of the main “Employees” screen.

1. Click on the main “Employees” tab at the top of the screen.
2. Click on “Pay Policies” from the row of links that runs across the top of the screen (directly below the main program navigation tabs).
3. Select the desired Employee from the drop-down menu.
4. Click on the  icon at the beginning of the header labeled **Holidays**.
5. Select the desired “Holiday” from the drop-down menu and click on the [ADD] icon. The selected Holiday is assigned to the employee.
6. Repeat the above step for each Holiday that you would like to assign to the employee.

Assigning Holidays using Policy Groups

Policy Groups are used when you want to assign entire groups of employees to the same Pay Policies.

1. Click on the main “Admin” navigation tab, and then on the “Policy Groups” link located under the **Personnel** section of the screen.
2. Click on the [ADD] icon to create a new group.
3. Enter a **Name** for this group as you would like it to appear in the system.
4. Click on the  icon labeled **Show Employees** to assign employees to the group. Select the desired employees in the “Unselected” box and click on the  icon. Use the “Quick Search” box to search for specific employees.
5. The group must be saved before Pay Policies can be specified. Click on the [CREATE] icon.
6. Multiple policies can be assigned to the group. Click on the  icon in the **Holiday** header to assign Holidays
7. Select each desired “Holiday” from the drop-down menu and click on the [ADD] icon.
8. When you have finished assigning Holidays to the group, click on the [UPDATE] icon to save the changes that you have made.

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. “Awarded Holiday Hours” allows you to define the number of hours awarded to employees on the Holiday.


Recalculating Employees

Any changes that you have made to your company policies (including Holidays) will not be applied on employee Time Cards until they have been recalculated.

1. Click on the main “Time Card” navigation tab at the top of the screen.
2. To recalculate an individual employee, select the desired **Employee** from the drop-down menu. Click on the [RECALCULATE EMPLOYEE] icon in the bottom right-hand corner of the screen.
3. Click on the [RECALCULATE COMPANY] icon to recalculate *all* employees.

Employee Pay Policies

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

1. Click on the “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. Click on the  icon in the Holidays header to view the **Holidays** that the employee is assigned to.

4. Make any necessary edits to the Holiday assignments and click on the [UPDATE] icon to save the changes that you have made.

Holiday Dates/Recurrence

Ensure that the date and recurrence of the Holiday is configured correctly in the Holiday Policy.

1. Click on the “Admin” tab, and then on the “Holidays” link located under the **Policies** section of the screen.
2. Locate the Holiday in question and click on it to bring up the detail screen.
3. Ensure that the Holiday **Date** and **Recurrence** are specified correctly.
4. If you have edited the Holiday, ensure that you click on the [UPDATE] icon and recalculate employee Time Cards to apply the changes that you have made.

Generating Holiday Hours

In order for Holiday hours to appear on employee Time Cards, the Holiday policy that they are assigned to must be set up to generate hours for the Holiday.

1. Click on the “Admin” tab, and then on the “Holidays” link located under the **Policies** section of the screen.
2. Locate the Holiday in question and click on it to bring up the detail screen.
3. Make sure that the **Generate Hours** option is selected. No hours will be automatically awarded with this option un-checked.

4. If you have edited the Holiday, ensure that you click on the [UPDATE] icon and recalculate employee Time Cards to apply the changes that you have made.

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2. Locate the Holiday in question and click on it to bring up the detail screen.
3. Make sure that the **Generate Hours** option is selected. No hours will be automatically awarded with this option un-checked.
4. If you have edited the Holiday, ensure that you click on the [UPDATE] icon and recalculate employee Time Cards to apply the changes that you have made.

Working on a Holiday

When an employee works on a day that is specified as a Holiday in the system, the program must be configured to award automatically generated Holiday hours in *addition* to their worked hours.

1. Click on the “Admin” tab, and then on the “Holidays” link located under the **Policies** section of the screen.

2. Locate the Holiday in question and click on it to bring up the detail screen.
3. Review the **Receive holiday and worked hours** option. If this option is not selected, employees who clock in on the Holiday will override the automatically generated Holiday hours.
4. If you have edited the Holiday, ensure that you click on the [UPDATE] icon and recalculate employee Time Cards to apply the changes that you have made.

Probation Periods

The TimeForce II system allows you to set up Probation Periods for Holidays. 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. An employee who has not met the specified Probation criteria will not receive automatically generated hours for Holidays.

1. Click on the “Admin” tab, and then on the “Holidays” link located under the Policies section of the screen.
2. Locate the Holiday in question and click on it to bring up the detail screen.
3. Under the “Probation Period” box, ensure that your settings are correct and that the employee in question meets the specified criteria.
4. If necessary, click on the [UPDATE] icon and recalculate employee Time Cards to apply the changes that you have made.

Using Holidays with Unscheduled Employees

The number of Holiday hours awarded for unscheduled employees is specified in the Holiday policy. Also, the options on a Holiday allow you to require that your employees work a set number of days before or after the scheduled Holiday in order for automatic hours to be generated. These settings will prevent an employee who is not assigned to a schedule in TimeForce II from receiving Holiday hours.

1. Click on the “Admin” tab, and then on the “Holidays” link located under the **Policies** section of the screen.
2. Locate the Holiday in question and click on it to bring up the detail screen.
3. Ensure that the “Awarded Holiday Hours” setting contains the number of hours that you would like the employee to receive.
4. Ensure that both the “Require Prior Shifts” and “Require Following Shifts” settings are not selected.
5. If you have edited the Holiday, ensure that you click on the [UPDATE] icon and recalculate employee Time Cards to apply the changes that you have made.

Using Holidays with Scheduled Employees

When using Holidays in conjunction with Schedules in the TimeForce II system, there are a couple of things to keep in mind.

- In order for Holiday hours to be generated, employees must be scheduled to work the day specified as a Holiday in the system.

- The number of hours awarded to scheduled employees is taken from the **Absence Hours** setting on the Shift Policy that their schedule is assigned to.
- 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 “Schedule” tab at the top of the screen, and then on the [SHIFT POLICIES] icon under the **Setup** header.
2. Click on the Shift Policy that the employee’s schedule for the Holiday is assigned to.
3. Ensure that the **Absence Hours** setting contains the number of hours that you would like the employee to receive on the Holiday.
4. If necessary, save the changes that you have made and recalculate employee Time Cards.

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