
Employee Tracker

Holidays

by Advanced Tracker



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Holidays

Overview

Employee Tracker can determine the amount of statutory holiday pay that each employee is due. Statutory holidays are easy to set up and easy to process in Employee Tracker. Once you have done the necessary one-time setup steps, all you need to remember is to run the Holiday Pay Run after each holiday has passed.

If you prefer to manually add the holiday time yourself to each employee, either in Edit Time & Attendance or in your payroll program, then you can ignore everything in this document.

Scope of this Document

This document covers Holiday Pay, being the pay that the government or union agreement dictates that an employee receives for not working on a statutory holiday.

It specifically does not cover Worked Holiday, being the premium pay that an employee receives for working on a statutory holiday.

Terminology

The word **Holiday** may evoke images of driving cross-country with the kids, or spending a week in a sunny beach paradise, or swinging in a hammock in the back yard with a cold drink and the latest novel. Sorry, those are **Vacations**, which are a specific form of **Absence**.

In time and attendance the word Holiday means statutory holidays, which are days designated by government to mark or commemorate some special occasion or event. Every country has several national statutory holidays, and every province or state has some statutory holidays designated through labour standards laws. Employees who meet qualifying requirements are entitled to a paid holiday or, if they are required to work, wages paid at a premium rate for work performed.

Setup

A number of things need to be setup before Employee Tracker can process holidays for you:

- the general rules that govern eligibility and payment calculation,
- the list of dates which are holidays,
- the employee's specific holiday information,
- the payroll interface export codes,
- optionally, the employee statuses can be linked to the holiday pay rules.

Each of these things is configured in the Setup menu.

Setup> Holiday Pay Rules

The Holiday Pay Rule is used during the Holiday Pay Run. The rule defines the eligibility requirements that an employee must meet, and how much holiday pay an eligible employee will receive. The rule settings depend on provincial or state statutes, or a collective agreement, or company policy.

Many companies will have one rule for full-time employees, and another rule for part-time employees.

The rules defined on this screen are used in

- Setup> Holidays,
- Setup> Employees,
- and Setup> Employee Status.

Special provincial rules

Note that in addition to the rules described here, there may be additional eligibility criteria or methods of calculation specific to your province or situation. These can be enabled and configured from the Utilities menu, in the menu items labeled Policies, and Labour Standards (province name).

Eligibility – Will the Employee Get Holiday Pay?

An eligible employee is one who has worked the requisite number of days before the holiday (e.g., must have worked on 15 of the 30 days prior to the holiday) and who was present on the scheduled work days before and/or after the holiday. All the eligibility criteria are optional.

Must have worked n days

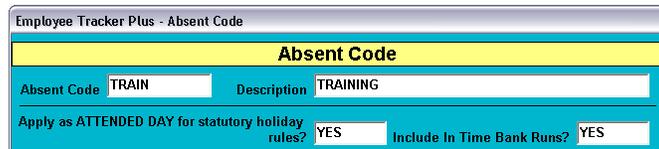
If the employee must have worked a certain number of days before the holiday, enter the values here:

Employee must work days out of days prior to the holiday. Pro-rate hours if employee fails this condition

For example, in BC the common setting is 15 out of 30, because that is what the province has legislated. If the employee has worked sufficient days before the holiday, he will receive holiday pay. If he has not worked sufficient days, he will receive no holiday pay, or he will receive a pro-rated amount of holiday pay if the “Pro-rate hours” option is checked.

If it does not apply (e.g., in Ontario), leave the two fields empty.

Note that in determining how many days the employee has worked, Absences can also be included. This is defined in Setup> Absences on a per-code basis, using the “Apply as attended day” switch:

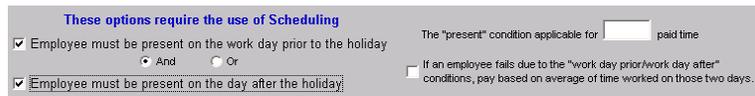


Absent Code	
Absent Code	TRAIN
Description	TRAINING
Apply as ATTENDED DAY for statutory holiday rules?	YES
Include In Time Bank Runs?	YES

In this way you can define that some absences (e.g., vacation, offsite training, etc.) are to be included in the count of days worked.

Must have worked the day before/after

If the company has a rule that the employee must be present on the day before and/or after the holiday, Employee Tracker can make this determination for you. Setup the parameters in the Holiday Pay Rule:



These options require the use of Scheduling

Employee must be present on the work day prior to the holiday

Employee must be present on the day after the holiday

The "present" condition applicable for paid time

If an employee fails due to the "work day prior/work day after" conditions, pay based on average of time worked on those two days.

Employee Tracker will look at the employee’s schedule to determine when the employee was supposed to be at work. **Therefore you must explicitly setup each employee’s work schedule** using Setup> Schedule and Operations> Schedule.

Use of this option affects the timing of when you can do your Holiday Pay Run – you must wait until the employee work day after the holiday so that the system can know whether he was present or absent. See “When to Run” on page 10 for more details.

If you have such a policy but prefer to implement it manually, do not check the options. In that case you will adjust the employee’s holiday hours using Holiday Pay Run or Edit T&A.

Method of Payment – How Much Holiday Pay Will the Employee Get?

The amount of holiday pay is calculated in one of three ways:

- based on the employee’s profile,
- based on full-time equivalent averaging,
- or based on a total hours formula.

All three methods determine the **amount of time** that will be paid for the holiday. That is, the number of hours that will be paid. The **rate** that those hours will be paid is a different matter. All three methods use the same mechanism for determining the rate.

Typically the hourly rate assigned to the holiday time will be the employee’s default rate. However for employees whose hourly rate fluctuates (e.g. because of working different positions that pay at different rates), you can have Employee Tracker figure out the average rate the employee worked for a given number of days before the holiday. In determining the average rate, Employee Tracker optionally can look at complete work weeks if you set a week-ending day of the week.

Pay what’s setup in the employee profile

The employee, if eligible, will be paid the amount of time defined in his employee profile Defaults category. See “Setup> Employees” on page 8.

This will be taken from the employee’s Maximum Pay Hours field. The Minimum Pay Hours will be ignored.

Pay based on full-time equivalent averaging

The employee, if eligible, will be paid based on a full-time equivalent averaging formula.

Set the “Days worked prior” value to the number of calendar days that Employee Tracker will look back when totaling the hours.

Set the “Full Time Equivalent” value to the number of hours that the employee would have to work in order to be eligible for a full day of holiday pay. E.g., if the employee normally works 160 hours in a month, set the value to 160:00.

Select the Time, Absent, and Holiday events that are to be included in the total.

Employee Tracker will count up the total amount of time, based on the types of time that are to be included in the total. As long as the total is greater than or equal to the amount of time specified as Full Time Equivalent, the employee will get a full day's amount of time. If the total is less than the Full Time Equivalent, the employee will get a pro-rated amount.

A full day's amount of time is defined in the employee's profile Maximum Pay Hours.

Note that if the employee's total does not meet the Full Time Equivalent, the resulting pro-rated calculation may be an odd amount of time such as 7:52. If you prefer to have the result rounded, set the appropriate Round and Grace values.

Pay based on total hour averaging

The employee, if eligible, will be paid based on a total hour averaging formula. This will result in the employee being paid an "average day length" for the holiday.

Set the "Days worked prior" value to the number of calendar days that Employee Tracker will look back when totaling the hours. Optionally you can choose to include only the employee's scheduled work days in the total.

Set the "Divide" value to "Total Shifts", or enter a specific number to divide by. E.g., in Ontario you typically set this value to 20, but in most other locations you would leave this set to "Total Shifts".

Select the Time, Absent, and Holiday events that are to be included in the total.

Employee Tracker will count up the total amount of time, based on the types of time that are to be included in the total, and divide that total by "Divide" value. The result will be an amount of time that the employee will be paid for the holiday. The result will be adjusted to fall within the employee's Minimum and Maximum Pay Hours as defined in the employee's profile.

Note that if the employee has not worked full shifts for the entire period of time, the resulting calculation may be an odd amount of time such as 7:52. If you prefer to have the result rounded, set the appropriate Round and Grace values.

Hierarchy of Rule Usage

Once the rules have been defined, they are referenced when setting up Holidays, Statures, and Employees. When more than one rule exists, it is important to understand which rule will be used during the Holiday Pay Run.

1. Employee Profile is the highest level. If there is a Stat Holiday Rule defined in the employee's profile (Default category), it will be used. If the employee profile is set to <No Default Holiday Pay Rule>, then either the rule set in the Status or the Holiday will take effect, in that order.

2. Employee Status is the second level. If no holiday pay rule has been defined at the employee level, and one has been defined in the employee status, it will be used. If the rule in the Employee Status is set to <Take Rule From Holiday or Employee>, then either the rule set in the Employee or the Holiday will be used, in that order.
3. Holiday is the third and lowest level. If no holiday pay rule has been defined for the employee or the status, and one has been defined for the holiday itself, then it will be used. If the rule in the Holiday is set to <No Holiday Pay Rule – System Defaults>, then either the rule set in the Employee or the Status will be used, in that order.

If no holiday pay rule has been selected at any level, then the employee will receive the Maximum Pay Hours as defined in the employee’s profile.

Setup> Holidays

The holidays themselves are defined using this screen:

The date of the holiday is the day that most employees will take off, the day that employees will get premium pay if they work.

If all employees are to get the same Holiday Pay Rule for this holiday, set it on this screen. If some employees will get a different rule from others, you can set the common rule on this screen, and set the other rule in the profile of the employees who will get the other rule. Or you can set the rule on a per-Status basis, if appropriate, in Setup> Employee Status.

Payroll Earning codes

The earning codes on this screen are not for the holiday pay. They are for the pay that an employee will get if he works on the holiday, if the codes are to be different from the earning codes used on normal non-holiday work days. The earning codes for the statutory holiday pay are defined in the Setup> Payroll Export screen. See “Setup> Payroll Export” on page 9.

Restrictions

The Restrictions tab allows you to indicate that the Holiday is in effect only for certain employees. (Most users will not use the Restrictions tab.)

Employee Tracker Plus - Statutory/Public Holidays

Statutory/Public Holidays

Date: 02/20/2006 Name: Alberta Family Day

Rule: < No Holiday Pay Rule - System Defaults >

Include hours against this holiday in Time Bank runs

Payroll Restrictions

Department: 0000 ADMINISTRATION

Status: FT FULL TIME EMPLOYEES

Shift: 0000 8:00 AM - 4:30 PM

Save Exit <<

For example, if your Employee Tracker includes employees from multiple provinces, including Alberta, you might define Alberta Family Day as a holiday that is in effect only for those departments that are located in Alberta. This assumes, of course, that it is possible to conclusively identify the relevant employees based on some combination of Department, Status, and/or Shift.

These restrictions do not affect the processing of the Holiday Pay Run. Rather, they define that certain days are to be considered holidays for certain employees. The section of the time calculation rule that decides whether the employee is working on a holiday and therefore is eligible to get premium pay will look to these restrictions. Employees who are included by the Restrictions criteria will be deemed to be working on a holiday, and therefore may be eligible for premium pay for working on a holiday, whereas other employees who scan on the same day but are not included in the Restrictions criteria will be deemed to be working on a normal non-holiday day.

Add New Holidays Every Year

It is entirely up to you to decide which dates are statutory holidays for your organization, as defined by law, collective agreement, and company policy. Continue to add new holidays to the table. Most users update the table once or twice a year, to keep ahead of things.

There is no need to remove old holidays from the table, although you can do so. Removing a holiday from the list does not remove any Holiday records from employees' time history. Note however that if you remove defined holidays from the list, recalculations of old time history for the period that includes the deleted holiday dates will no longer treat time worked on those dates as premium time.

Setup> Employee Status

If employees of different statuses have different holiday pay rules, it may be appropriate to associate the rule with the status. E.g., full-time employees use one rule, and part-time employees use a different rule. This is more convenient than specifying the rule in each employee's profile.

Setup> Employees

Each employee has some settings in his profile that determine whether he can get holiday pay, when he can start getting it, and how much.

These settings affect the operations of the Holiday Pay Run. They do not affect what you can do when entering Holiday pay manually using Edit T&A or Scheduling.

If the employee can get holiday pay, the bottom half of this screen needs to be filled in.

The Stat Holiday Eligible Date is the first day that the employee could get stat pay. This often corresponds to a defined waiting period following the hire date, e.g. 30 days.

The Stat Holiday Rules is the rule that this employee must use during the Holiday Pay Run, even if a different rule is defined in Setup> Holidays or Setup> Employee Status. It is a high-level override, and is typically not used. It is usually possible to

define the holiday pay rule in the Employee Status or in the Holiday itself, so that it is not necessary to define it on a per-employee basis.

The minimum and maximum pay hours define the boundaries of how much holiday pay the Holiday Pay Run can calculate, depending on which method of calculation is defined in the Holiday Pay Rule. The values are defined on this screen, or are taken from the employee's schedule for the day.

The Bank Stat Pay setting defines whether the employee's holiday pay will be paid or banked, and if banked, into which bank the time will be deposited.

Setup> Payroll Export

The Payroll Export Setup defines how Employee Tracker will prepare the data for the payroll program. It defines, among other things, the export codes used in the interface file between Employee Tracker and the payroll program.

The specific settings are individual for each payroll provider and for each customer. Consult your payroll provider for the specific values to use.

	Earning Code	G.L. Account Number
Regular Hours:	R	
1.5 Hours:	1	
2.0 Hours:	2	
Holiday Regular:	X	
Holiday 1.5:	X1	
Holiday 2.0:	X2	
Piece Work:		

There are two kinds of time that are related to holidays: statutory holiday pay, and time worked on a holiday.

Time worked on a holiday

Time worked on a holiday is usually paid at a premium rate, as defined in your Time Calculation Rules. If that time is to be sent to the payroll program in the same category as any other time (or time-and-a-half, or double-time) worked, then nothing special needs to be done. However, if time worked on a holiday needs to be sent to the payroll program as a special category of time different from time worked not-on-a-holiday, those codes are not defined on this screen, they are defined on the Setup> Holidays screen. See “Setup> Holidays” on page 6.

Statutory holiday pay

Holiday pay (being the pay that an employee receives simply because it is a holiday regardless of whether she works on the holiday or not) is usually sent to the payroll program as a special category of time. The associated earning codes are defined on this screen in the Holiday Regular, Holiday 1.5, and Holiday 2.0 fields. If holiday pay is to be summed with normal time worked and not treated in any special way by

the payroll program, fill the Holiday fields with the same values are used for the Regular Hours, 1.5 Hours, and 2.0 Hours.

Operations

Once the Setup elements are in place, processing the Holiday can be done in a number of ways:

1. Use the Holiday Pay Run to create Holiday records for a number of employees at once. (See “Operations> Holiday Pay Run” on page 10.)
2. Use Edit Time & Attendance to add or edit Holiday record on a per-employee basis. (See “Operations> Edit Time & Attendance” on page 13.)
3. Use the Schedule instead of Edit Time & Attendance to add or edit Holiday records on a per-employee basis. (See “Operations> Monthly Schedule” on page 15.)

Use the operation that is most convenient or appropriate for your situation. You may use a combination of operations.

The desired end result is to put Holiday records into each eligible employee’s time history, so that the holiday pay can be exported to the payroll provider along with the pay for time worked.

Operations> Holiday Pay Run

The Holiday Pay Run calculates how much stat pay each eligible employee is entitled to receive, and creates Holiday records in each employee’s time history.

When to Run

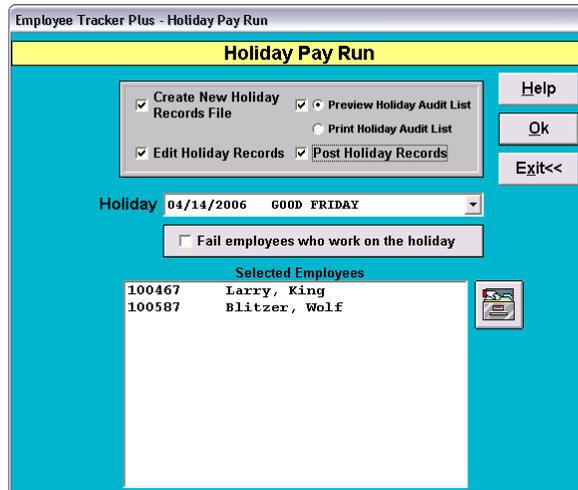
Holiday Pay Run is usually run after the holiday has passed, but before the Payroll Export Run that includes the holiday.

If you do not have any eligibility criteria (e.g., must work 15 out of 30, must work the scheduled day after) then you may post the Holiday Pay Run before the holiday actually happens. Otherwise wait until the holiday has passed.

See also “Employee Must Work the Day Before/After the Holiday” on page 17.

The Four Steps

Use the Operations> Holiday Pay Run menu item:



The Holiday Pay Run has four steps, which are processed in this sequence:

1. Create
2. Edit
3. Preview / Print
4. Post

You can do them all in one pass, or you can single-step through the process. The results from one step are passed along to the next step as long as you do not exit from the Holiday Pay Run screen. If you Exit, you will need to start the Holiday Pay Run from the beginning the next time you go back into it. This is unlike the Payroll Export Run, which allows you to exit and return later to the run already in progress.

Between each step you will receive a dialog box saying “Holiday Pay Run is complete”. Press OK to move to the next selected step.

You may omit the Edit and Preview/Print steps if you like. The two required steps are Create and Post.

Press OK to run the selected steps.

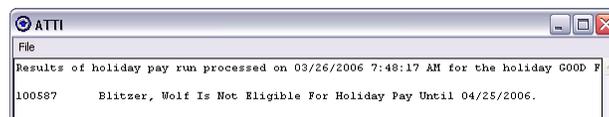
Create New Holiday Records File

The “file” in question is not an actual file at all, but simply a “batch scratchpad” that is maintained for the duration of the Holiday Pay Run.

Check the Create option, and specify which Holiday is to be processed, and which employees are to be considered for holiday pay. As with other parts of Employee Tracker, use the Employee Specification Buckets button (the hand reaching into the filing cabinet) to select the employees. Usually you will choose the same employees who you would choose for a Payroll Export Run.

If you have a policy that employees who work on the holiday are to receive only their work pay but no holiday pay, check the “Fail employees who work” option.

The Create step will display a Warning screen, if any employees have been rejected for any reason:



The warnings will notify you of the reasons for the employees' ineligibility. Common reasons include

- Not having reached the eligible date specified in the employee profile
- Not having worked sufficient days prior to the holiday (e.g. 15 out of 30)
- Not having worked the scheduled day before and/or after the holiday

You may print or save the Warning report, from its File menu.

If you exit from the Holiday Pay Run process to investigate or resolve the warnings, you will need to restart the Holiday Pay Run from the beginning with the Create step.

Edit Holiday Records

This step permits you to alter the information in the "batch scratchpad" that was created in the prior step. You can edit the information, add records for employees who were skipped by the prior step, or delete records for employees who should not get holiday pay.

Employee	Date	Time
100467 Larry, King	04/14/2006	08:00

The Edit button will permit you to change the amount of holiday time that the selected employee will be paid.

Note that if you find you need to edit this information, it may be that the Holiday Pay Rule is not setup correctly, and that it may be preferable to change the rule settings to give the correct results in the first place, rather than editing the records.

When you Exit from this step, Holiday Pay Run will move to the next selected step.

Preview/Print Holiday Audit List

This step lets you print the information in the "batch scratchpad". You can preview on the screen, or send it to your defined printer.

Employee	Description	Date	Rate
100467 - Larry, King	GOOD FRIDAY	04/14/2006	08:00

Total number of employees included: 1
Total number of hours for employees: 8.00

The report includes the total number of employees who will be receiving holiday pay, as well as the total amount of time to be paid. The count of employees excludes those who were rejected on the warning list.

Post Holiday Records

The Post step uses the information in the “batch scratchpad” to create the actual Holiday records in the employees’ time history. Until you complete this step, nothing has been put into the employees’ time history.

After this step has completed you can see the results in each employee’s time history. You can then print the records using the Print T&A function, or edit the posted Holiday records using Edit Time & Attendance.

Posting the same holiday more than once

If you run the Holiday Pay Run more than once for the same holiday, all the way through the Post step, any Holiday record posted will replace Holiday records that may already be in the employees’ time history. Multiple runs for the same Holiday will not create multiple Holiday records.

Posting multiple holidays

Occasionally two statutory holidays fall so close to each other that they interact. They may even fall in the same pay period. Typically this happens for Christmas and New Year. In that case you must run the Holiday Pay Run twice, once for each holiday.

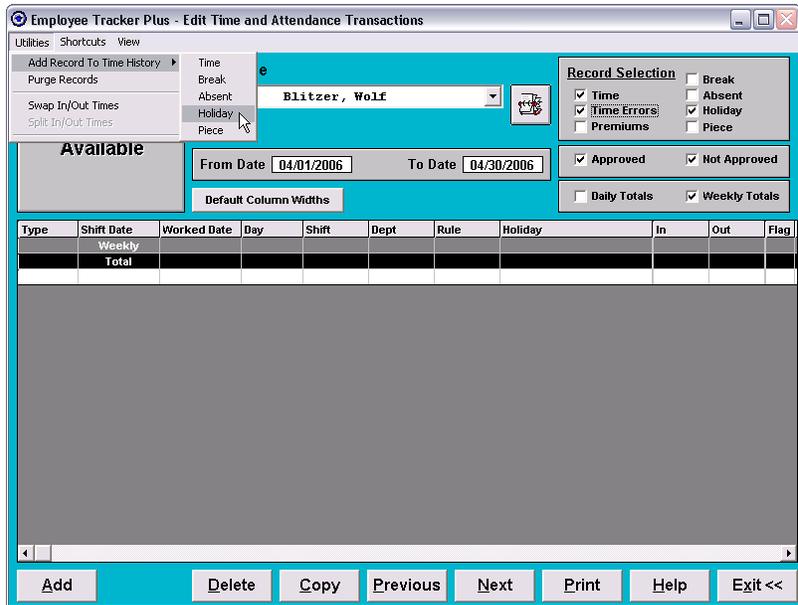
When the holiday pay rule includes a “15 out of 30” type of eligibility specification, if the employee’s time history has a holiday record for the prior holiday (Christmas) it will be included in the count when processing the next holiday (New Year).

Keep in mind that when calculating the amount of time payable using the Full Time Equivalent Averaging or the Total Hour Averaging methods, your rule may need to include the hours of the prior holiday (Christmas) in the total hours for the next holiday (New Year). See “Pay based on full-time equivalent averaging” on page 4 or “Pay based on total hour averaging” on page 5 for details.

Operations> Edit Time & Attendance

You can manually add a Holiday record to any employee’s time history, or edit or delete an existing Holiday record if you like. If you add the record manually you decide how much time to allocate; the Holiday Pay Rule is not used for a manual addition of a Holiday record.

Add the holiday record by pressing the Add button at the bottom-left of the Edit T&A screen, or by selecting the Add Record function from the Utilities menu:



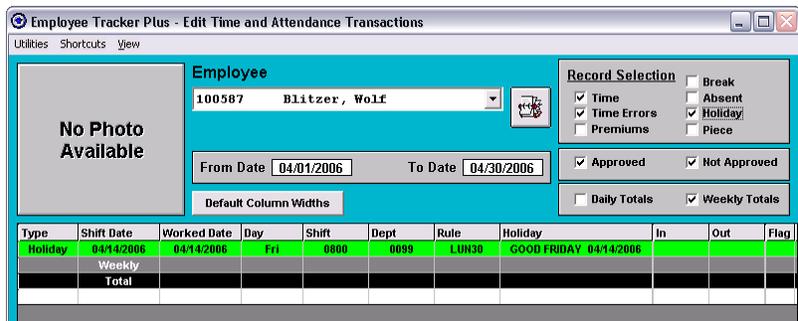
Note that for the Add button, you can add only those types of records that you have selected using the Record Selection checkboxes at the top-right of the screen.

The Add Holiday Record screen is displayed:



Enter the date on which you want to pay the holiday pay, then choose the holiday and the amount of time.

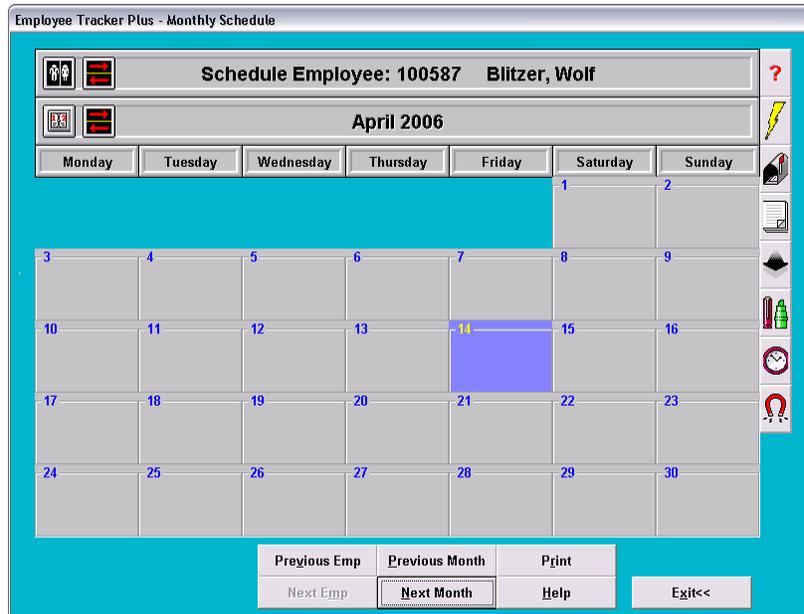
The resulting Holiday record is put into the employee's time history:



Operations> Monthly Schedule

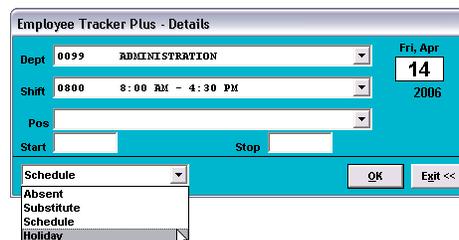
You can manually add Holiday records to one or more employees using the Schedule functions. This is functionally equivalent to adding the Holiday records using Edit Time & Attendance, but it may be more efficient to use the schedule if you want to add the holiday to many employees at once.

The Monthly Schedule shows any defined holiday dates with a light blue background. This simply indicates visually that the date is in the Setup> Holidays table (similar to circling special dates on your wall calendar); it does not mean that there is a Holiday record in the employee's time history:

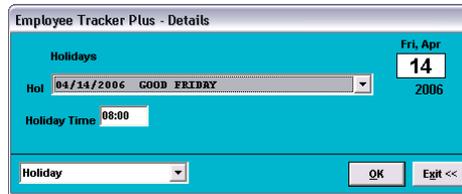


Adding a Holiday Record for One Employee

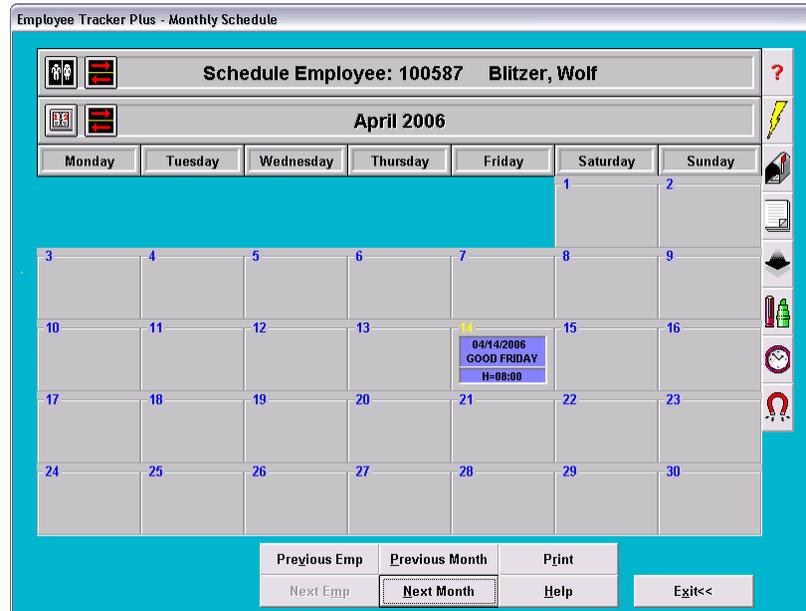
Using the Monthly Schedule you can add a Holiday to any employee's time history. When viewing the employee's schedule, double-click on the day that you want to pay with Holiday pay. Note that you do not have to choose the official day of the holiday; you can add the holiday pay to any day you like. From the Details window select the Holiday option in the bottom-left selector:



Choose the holiday to apply as well as how much time to pay:



The Monthly Schedule will now reflect that the employee will be getting holiday pay for that day:



We can tell that this is an actual time history Holiday record because it shows the name of the holiday and the amount of time the employee will be paid as holiday pay.

Designated alternate holiday days

Note that you do not have to add a holiday on the defined date for that holiday. For example, if you wanted the employee to work on Good Friday, but take a different day off as his “Good Friday” holiday, you would double-click on the other day and add the Good Friday holiday time to that day.

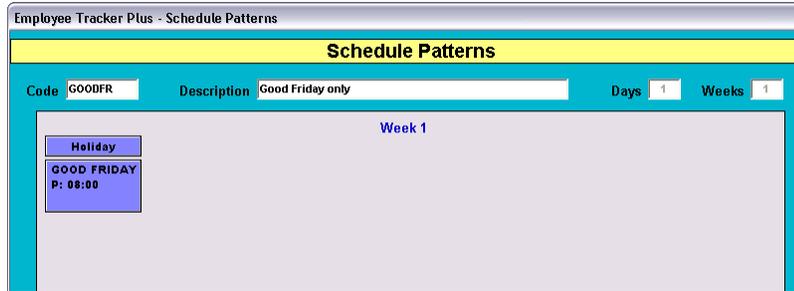
Adding Holiday Records to Multiple Employees

The Post function can be used to add a single Holiday to multiple employees. This is a two step operation:

1. Setup a schedule pattern that consists of exactly one day, being the holiday.
2. Post the pattern to multiple employees.

Setup a one-day schedule pattern

From Setup> Schedule> Schedule Pattern, add a new pattern. Set it up so that the pattern looks like this:

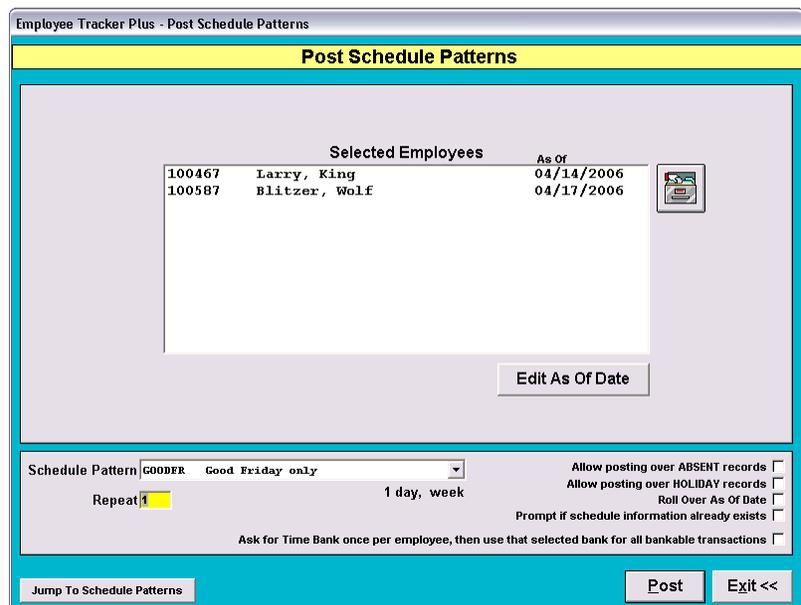


Delete days until there is only one day, then double-click on the remaining day and define it as the desired holiday.

Post the pattern to multiple employees

From Setup> Schedules> Post Employee Schedules, post the one-day holiday pattern to the desired employees.

- choose the employees who will get Holiday pay
- choose the date on which each will get the Holiday pay (use ctrl/shift to multi select)
- choose the one-day pattern you just created
- repeat only once

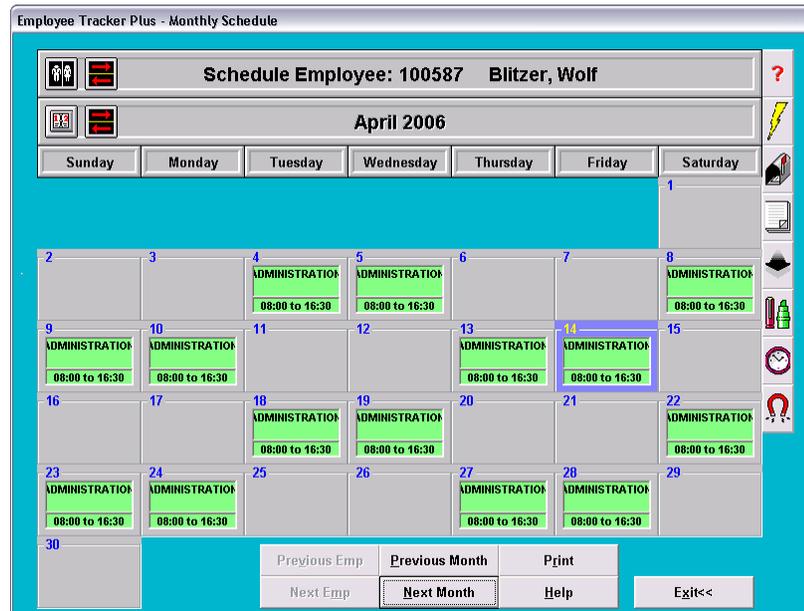


The posting function can also be activated from the Monthly Schedule screen by pressing the Post button (which looks like a mailbox, or a postbox, get it?).

Employee Must Work the Day Before/After the Holiday

The Holiday Pay Rule has a setting defining whether the employee must be present the day before and/or the day after the holiday (see “Must have worked the day before/after” on page 3). This requires that the system know the employee’s work schedule, to know which days need to be checked for presence.

Here is an employee's schedule, where the pattern has the employee working 7 days out of 14:



The employee is scheduled to work the day before (on April 13), then take three days off (returning on April 18).

In this case it's not possible for the rule to determine whether the person has worked on his scheduled day after the holiday until at least the 18th. If there is no payroll scheduled between April 14 and April 18 then everything is fine. However if the payroll is scheduled to be run on, say, April 17, then you may need to relax the "must be present after" rule before doing the Holiday Pay Run on April 17, trusting that the employee will show up as scheduled. If the employee does not work as expected, a payroll adjustment may be necessary.

Glossary of Terms

Holidays

A day off with pay mandated by government or by contract. A statutory holiday. E.g., New Year's Day. Not to be confused with vacations, which are a specific case of Absence.

time history

The records that you can see in Edit T&A, and that you can print using Print T&A. These include Time, Error, Absent, Holiday, Premiums, Break, and Piece records.

absences

Time and attendance events that record a period of time when an employee has not scanned. An absence may be paid or unpaid (e.g. Vacation vs AWOL). Specifically in regard to determining holiday pay eligibility, some absences may be considered as if the employee were at work.

time calculation rule

A collection of settings that determine how scans are to be interpreted and paid. This includes setting how much to pay when the employee works on a statutory holiday.

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