

Setup Step 5 - Employees

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The Employee setup is the culmination of all the other setup steps. It is the final step to setting up your Time and Attendance Database. SedonaOffice customers will have to create an employee for each user for Time and Attendance.

There are many options for setting up your employees, but listed is what needs to be set up in order for the employee to be able to clock in.

1. Attach your employees to their associated user with the first field in the employee setup.

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2. For SedonaOffice customers, make sure you add your employees to their respective technician.

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3. Make sure you attach your employee to their respective paygroup in the paygroup dropdown field.

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4. At the very bottom of the setup is the paycode area, where you will add the paycodes that the employee needs to be able to clock in to. Each employee can only clock into the paycodes that are assigned to him/her. *Make sure that one of the paycodes has a default box checked, as without a default your employee will not be able to clock in*

Default Hourly Paycode Rate: We originally made the point that when we are creating paycodes, we are going to leave the hourly rate at zero because most likely each employee gets paid differently. For each paycode that has a rate of zero in the employee setup, those paycodes will default to the amount setup in the employees 'Default Hourly Paycode Rate' field. If any hourly rate exist for a paycode assigned to the employee it will use that rate instead of the 'Default Hourly Paycode Rate'.

Dispatch/Arrival Defaults: Just like there is a default area for dispatch and arrival on appointments in the preferences area of the setup, there is also a default area for dispatch and arrival in the employee setup. The paycodes setup in the employee setup will take precedent over those setup in the preferences. If you leave these blank in the employee setup, the defaults setup within the preferences area of the setup will take precedent.

Salary: This is the area of the employee setup where you can set them up to be on salary. Check the salary box, select the salary paycode, which should already be created, and then specify the salary amount.

How do I add Tracked Hour or SedonaJob paycodes?

When adding paycodes, add them by type (Standard, SedonaJob, Tracked Hours). You can change what type of paycodes you are adding to an employee with the 'Manage PayCode Type' dropdown.

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PTO Paycodes: As stated above, you will want to change your 'Manage PayCode Type' dropdown to Tracked Hours first. Then, when you add the paycode(s), specify whether this employee has fixed or accrual hours.

- If the employee is fixed, place the amount of hours they have available to use per year in the 'Max Trackable Hours' field.
 - If the employee is accrual, place the amount of hours they accrue per hour of work in the 'Reg Hrs Accrual Factor' field.
 - If they accrue extra hours during overtime work, place how many hours are accrued per overtime hour in the 'OT Hrs Accrual Factor' field.
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