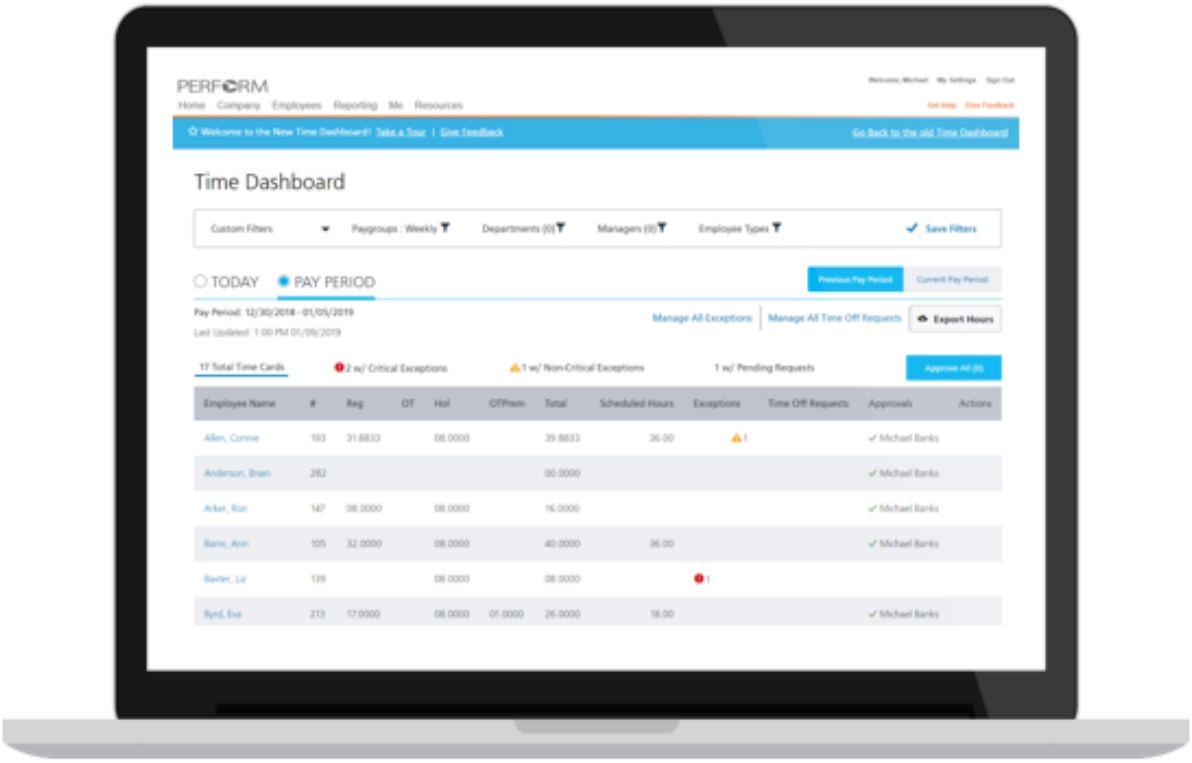
Paycor

Perform Time

CLIENT TRANSITION JOURNEY



ABOUT THIS GUIDE

Your organization will be fully transitioning to Paycor Time, Paycor's Time and Attendance technology platform. Paycor Time will offer your organization immediate advantages in terms of ease of use, tracking labor costs, attendance management and a unified platform with Paycor Payroll.

Here is what LJ Associates had to say about Paycor Time and how it helped address their absenteeism problem and how it reduced their overall labor costs through our unified platform:

LJ Ross saved $30K while decreasing employee absenteeism and tardiness by 250%. Because of Paycor's automated time solution with P&I, HR and supervisors are no longer burdened with reviewing manual timecards or managing it's P&I policy.

LJ Ross Associates Overcome Absenteeism with Paycor

Alline Fox, *HR Generalist, LJ Ross Associates*

"Paycor's solution has provided business results above and beyond what I and our executives expected."

As a part of this journey, we'll review with you all the key benefits you'll receive by transitioning to Paycor Time.

Paycor is committed to making this process as easy and convenient for you as possible, however, your participation is critical to the success of the transition.

To ensure your readiness and prevent any interruptions of service, this guide outlines communications, tools and instructions that will guide you step by step through the process along with the assistance of your dedicated transition consultant. In fact, Customers with the highest level of satisfaction with the transition relied on the Client Transition Journey to keep them on pace and informed. We hope you find this to be a valuable

tool as well. We've created an easy to follow transition checklist that will guide you each step of the way during your transition.

Should have any questions or concerns, please contact TimeUpgrades@paycor.com.

Thank you for your continued trust in Paycor!

TRANSITION CHECKLIST

Discovery (45 days prior)

- ☐ !! View Paycor Time Intro Video (20 mins)
- ☐ Review Paycor Time Client Microsite (10 mins)
- ☐ !! Review Time Configuration Summary (30 mins)
- ☐ !! Sign and Return Transition Agreement (5 mins)
- ☐ Provide your shipping address (Physical Clock Clients Only)

Configuration (15-30 days prior)

- ☐ !! Attend call with Transition Consultant (15-30 mins)
- ☐ Complete required training modules (90 minutes)
- ☐ Paycor Time Service Activation
- ☐ !! Review and Complete Database Configuration (varies based on setup)

Live Punch Prep (5-10 days prior)

- ☐ Prepare your organization for the transition (Duration: 15 mins)
- ☐ Approve all pending time off requests in TOD (Duration: 5 mins)
- ☐ Install time clock hardware (Physical Clock Clients Only)
- ☐ !! Notify employees to begin using Paycor Time

Live punching and beyond

- ☐ Monitor Time Dashboard for activity (Duration: 15 min)
- ☐ Complete first payroll import
- ☐ !! Prepare for Deactivation of TOD – Historical Data
- ☐ !! Return clock hardware (Physical Clock Clients Only)

!! Denotes Critical Task

RESOURCES & TRAINING

WHAT IS YOUR GOAL?	LEARN ON YOUR OWN	LEARN WITH PAYCOR
Educate yourself	Manage Access Manage Employees Importing Time Paycor Time Reports	Paycor Time Overview Paycor Scheduling Paycor Time Policies
Educate your Managers	Managing Time Off Managing Timecards Time Dashboard	Paycor Time Supervisor Timecard Overview
Educate your Employees	Employee Timesheet Requesting Time Off Employee Punch Instructions	

DISCOVERY: 45 DAYS

VIEW PAYCOR TIME INTRO VIDEO

!! Duration: 20 mins

Review the Paycor Time Intro Video which provides an overview of the new system and prepares you for completing upcoming actions. It is approximately 20 minutes in length.

REVIEW PAYCOR TIME MICROSITE

Duration: 10 mins

Everything you need to get started with your Paycor Time Transition, can be found on our microsite. Here you can find product information, helpful videos and webinars, training materials, FAQs and more.

REVIEW TIME CONFIGURATION SUMMARY

!! Duration: 30 mins

The Time Configuration Summary is a requirements overview of your Time on Demand configuration translated for Paycor Time. You will receive the Time Configuration Summary from your Transition Consultant approximately 30-45 days prior to your live punch date.

To ensure you have a smooth transition it is critical that you review and validate the configuration of Paycor Time. While we have access to your ToD configuration and can replicate that in Paycor Time, this is your opportunity to confirm that your policies have been interpreted accurately. In addition, the transition offers a chance to make changes to or even remove rules and policies that may be outdated.

Steps to review configuration summary:

Step 1: High Level Review of Policy Groups

Policy groups in Paycor Time serve the same function as Pay Classes in ToD. Before you begin to review each rule and policy that make up your policy groups, it's important to review the policy groups themselves at a high level to ensure that none are missing or that we don't build policy groups that are no longer necessary. For example, maybe your organization had Part Time employees at one point in ToD but now everyone is either Full Time or Salary. This is a case where we'd only want to build the Full Time and Salary policy groups in order to keep your system clean and simplified. Please note that as you're reviewing this list, there may be policy groups that have already been removed by your Transition Consultant. Much of the time this is intentional as Paycor Time allows us to not have to account for things like punch methods, pay period frequencies and other variables in the Policy Group setup as was required by the pay classes in ToD. An example of this would be: In ToD, you may have had Full Time Weekly and Full Time Bi-Weekly pay classes. In Paycor Time, this would be condensed to Full Time as the pay period frequency is driven off the employee's profile.

Step 2: Detailed Policy Review

Once you have confirmed that the policy group list is accurate, now it's time to move on to reviewing each individual policy. This means settings like Overtime, Meals, Rounding.etc. This is where you can ensure that things like Holiday Eligibility, Time Card Exceptions, Overtime Thresholds and many other items are documented and configured correctly. Identifying any necessary changes that need to be made before live punching begins will ensure a smooth and successful transition of these configuration items.

SIGN AND RETURN TRANSITION AGREEMENT

!! Duration: 5 mins

A revised client service agreement will be emailed to you approximately 45 days prior to your live punch date and details the transition of services on your account. It will need to be signed and returned before your transition start date.

PROVIDE YOUR SHIPPING ADDRESS (PHYSICAL CLOCK CLIENTS ONLY)

With your transition, you will need to begin using a new physical clock that is compatible with Paycor Time. YOUR CURRENT PHYSICAL CLOCK WILL NO LONGER WORK ONCE THE REQUIRED TRANSITION TAKES PLACE. Your Transition Consultant will be reaching out to you approximately 45 days prior to your live punch date to gather information necessary to get your organization setup with new clocks. It is imperative that you provide Paycor with the shipping details so we can send your new clocks to the correct location. You will receive your clocks about 14 days in advance of your live punch date. PLEASE NOTE: You will be required to return current rental clocks.

If you currently use a physical clock and would like to use a web-based clock in the future please notify your Transition Consultant when they reach out to you

CONFIGURATION: 15-30 DAYS PRIOR

ATTEND CALL WITH TRANSITION CONSULTANT

!! Duration: 15-30 mins

In order to make your transition as seamless as possible, we have assigned a dedicated Transition Consultant who will guide you throughout the entire process. Your Transition Consultant will reach out to you approximately 30 days prior to your live punch date. If you have questions prior to this call or haven't received a communication from your Transition Consultant, please email TimeUpgrades@paycor.com.

COMPLETE PAYCOR TIME TRAINING MODULES

Duration: ~90 mins

Review the following training materials which walk you through navigating the new system and prepare you for your upcoming transition. These training links should also be shared with others within the organization to ensure they are ready for the transition.

Educate yourself	Manage Access Manage Employees Importing Time Paycor Time Reports
Educate your Managers	Managing Time Off Managing Timecards Time Dashboard
Educate your Employees	Employee Timesheet Requesting Time Off Employee Punch Instructions

*NOTE: Time Off Manager will not be active until we go live as it can interfere with Time and Attendance leave requests if both are active)

Additional training & resources are available below.

THE TRAINING HUB
Sign in to **Paycor.com** > Hover over **Resources** menu > click **Paycor Training**

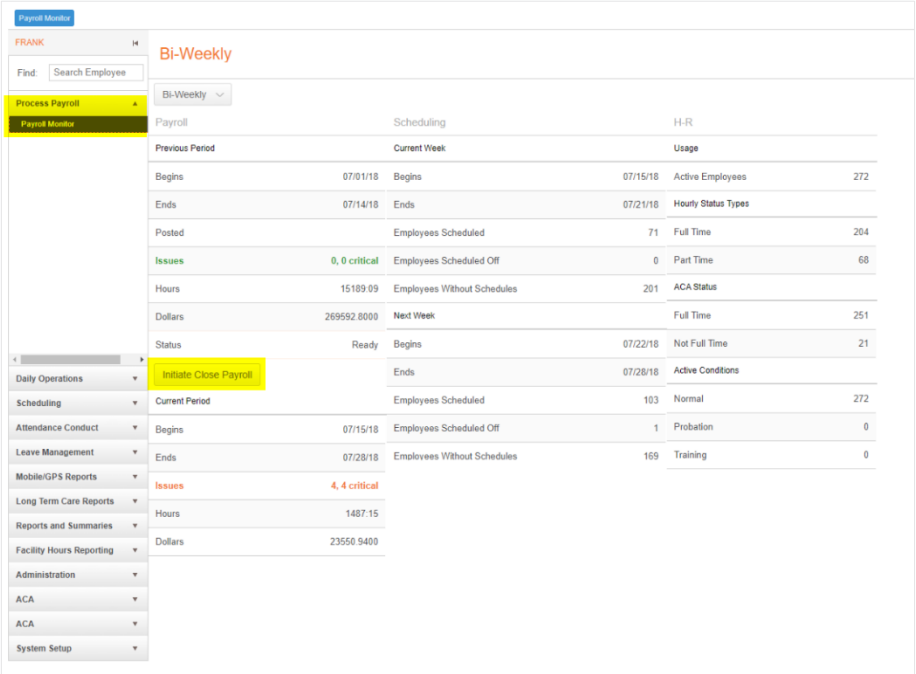
SEARCH FOR JOB AIDS
Sign in to **Paycor.com** > Select **Get Help** > Select **Knowledge Base** > Select the appropriate product > Browse the relevant job aids.

PAYCOR TIME SERVICE ACTIVATION

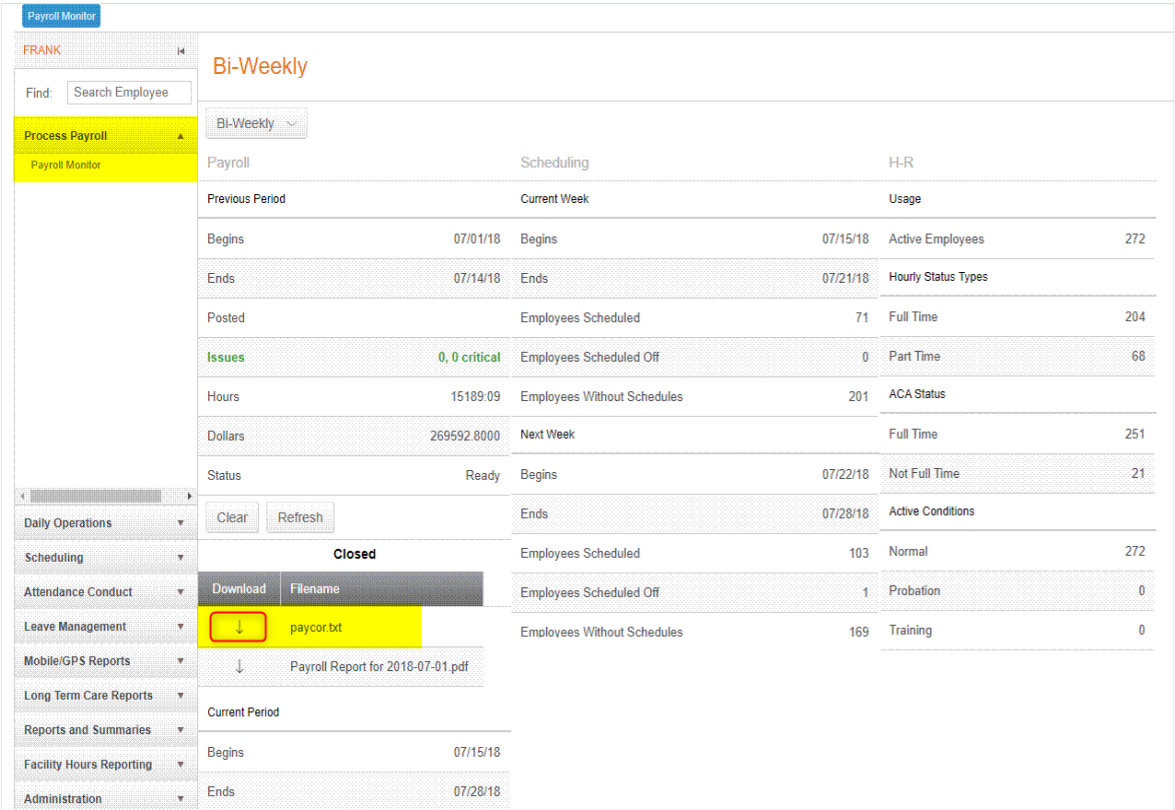
At the time when Paycor begins the configuration, having both the ToD and Paycor Time services active at the same time results in some changes to the appearance and workflow in your system.

- **New Hire Process:** Once the Paycor Time service is activated, you will need to adjust your process of adding employees to Time on Demand as the option to select “Add this employee to Time and Attendance” will no longer appear in the new hire wizard. Instead, you’ll simply navigate to the employee’s profile after hiring them and complete those fields in the Work Hours Settings section of the profile.
- **New Paycor Time Related Menus/Options:** As we activate the service, you will also notice that menus and options related to Paycor Time functionality will appear in your system. You employees and managers are to ignore those options and continue completing their daily activities as they normally would until you communicate otherwise. This will not negatively affect any ability to work in Time on Demand.
- **Time Import:** Lastly, and most importantly there will be a low impact process change to the way you import your hours from Time on Demand into payroll for 1 to 2 pay periods. Detailed instructions are below.

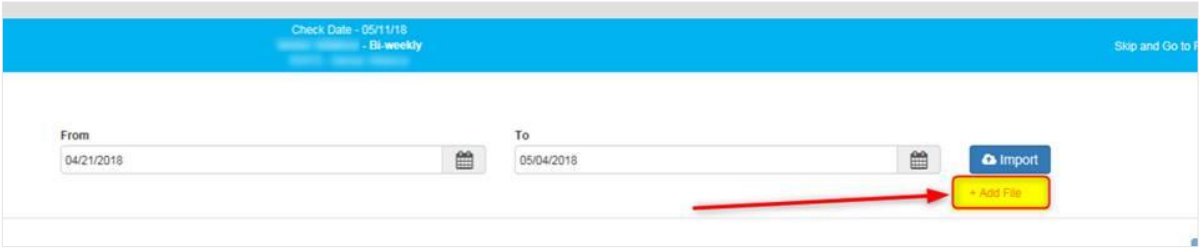
Step 1: Normally, when you go to the Paygrid, you would just select the Import Time button. Now, and only during the transition phase, you will go to Manage Time & Attendance > Payroll Monitor > select Initiate Close Payroll.



Step 2: When completed, it will produce two files in the Production Files box. You need to save the file ending in .txt somewhere that you will remember to find it. (Make sure to save it as a .txt file).



Now you are ready to go to the Paygrid and import the file. It will say Import and + Add File, and you will select + Add File, Browse and find your file you saved and hit OK.



From here, you will continue the same steps that you normally would with any other payroll processing.

REVIEW AND COMPLETE DATABASE CONFIGURATION

!! Duration: Varies based on setup

In order to ensure your new Paycor Time system is configured correctly we require you to view the configuration review recording and complete required activities. This step is in place to allow you complete an audit of the database and provide any feedback or changes that need to be made. After the changes are made, you will need to complete a final review and approve the configuration. If there are no changes, you will need to send approval of your configuration to your Transition Consultant via email after completing your audit.

If we do not receive customer sign-off in a timely manner, we will assume the information is correct. All changes will then be the responsibility of you and your organization to address.

To begin: **View Configuration Recording**

Next, below are important items that you should audit and/or configure.

1. Validate that your Transition Consultant has assigned employees to the correct Policy Groups
2. Audit manager to employee assignments to ensure accuracy for each employee. These are most likely already accurate, but it's recommended to perform this audit as it is one piece of data that drives who the managers will have access to when they login and who Time Off requests are routed for approval.
3. Assign manager access roles to the appropriate Manager users. See Paycor Time: Manage Access for more information)
4. Verify Holiday dates
5. Create Schedules if necessary
6. Create Mobile Punch Locations if necessary

LIVE PUNCH PREP: 5-10 DAYS PRIOR

PREPARE YOUR ORGANIZATION

Duration: ~15mins

Notify your managers and employees of the upcoming transition to Paycor Time.

Ensure employee shortcuts to KIOSK or Employee Self Service punching links are updated and/or removed. As a reminder, these can be found in Company > Configure Company > Time and Attendance > Punch Profiles.

Below is an email template that can be used to prepare your employees for live punching in Paycor Time. The template can also be downloaded from our microsite.

> **[Subject Line]**: Exciting News: Get Ready for Paycor Time
> **[Body Copy]** :
>
> Hello **[NAME]**,
>
> I'm excited to inform you that Paycor, our HR & Payroll partner, is rolling out an amazing new time solution that will make managing your schedules and requesting PTO easier than ever.
>
> Here are the advantages you can expect:
>
> - Employees can easily manage their schedule and request PTO by mobile, web, kiosk or clock
> - Using geolocation, employees can punch in on their mobile devices
> - Proactive alerts will notify employees of scheduling errors or discrepancies
>
> I encourage you to read through the attached training materials below, complete with everything you need to get the most out of Paycor Time.
>
> [Insert training link(s) from above based on audience (Employee vs Manager)]
>
> As always, if you have any questions or feedback, please contact me at **XXXX**.

APPROVE ALL PENDING TIME OFF REQUESTS

Duration: 5 mins

Approve any outstanding time off requests in Time on Demand so that those can be reentered into Paycor Time.

INSTALL TIME CLOCK HARDWARE (PHYSICAL CLOCK CLIENTS ONLY)

You will receive your new clock(s) approximately 14 days prior to your live punch date. Instructions for clock setup and help guides will be included with the clock. Please review these materials, complete steps to set up the clock, and reach out to your Transition Consultant with any questions.

NOTIFY EMPLOYEES TO BEGIN USING PAYCOR TIME

!! Duration: 5 mins

A couple days prior to go live, send a reminder to managers and employees ensuring they begin using Paycor Time.

Sample Email Template

> **[Subject Line]: Paycor Time Live Punch Reminder**
>
> Hello **[Name]**,
>
> Please remember that **[Day of Week/Tomorrow]** we will be going live with Paycor Time and you should be punching in that system only and no longer tracking time in ToD. This goes for Managers as well. All of your timecard and time off request approvals will now take place in Paycor Time via the Time Dashboard. Please ensure that you can access your employees in the dashboard and that you are reviewing for timecard accuracy more frequently than normal through this initial transition phase. This will allow us to catch any changes that need to be made. If you have any questions or concerns, please let me know so that I can pass them along to our transition consultant at Paycor.

LIVE PUNCHING AND BEYOND

MONITOR TIME DASHBOARD FOR ACTIVITY

You are now live on Paycor Time and your employees should start using it to punch in and out.

Key Steps for a Successful Transition to Paycor Time:

1. Reviewing your TODAY dashboard to make sure that employees scheduled to work this morning are punching.
2. Contact managers and employees to make sure that no one is having any difficulty accessing the system.
3. Make sure managers are completing their final review and approval of the Time on Demand time cards for the period that ended yesterday and that they are using the direct link and credentials provided last week.
4. Contact your Transition Consultant regarding any questions
5. Don't forget about all the resources available to you and your team as you begin your journey with Paycor Time.
    - Communication Hub
    - Training Modules
    - FAQs
    - Webinars
    - And More

COMPLETE FIRST PAYROLL IMPORT

!! Duration: 15 mins

Now that you've completed your first full pay period using Paycor Time, you will resume your normal import process. As a reminder from previous materials, we have included a refresher on the steps involved to Review and Submit your time.

PREPARE FOR DEACTIVATION OF TOD – HISTORICAL DATA

!! Duration: Varies based on setup

After you have completed your last payroll using data from Time and Attendance, we will want to make sure you have any historical time card data that you need before we close down that database. The database will be closed on the 20th of the month following your live punch date. (Example: Live punch is 11/15, database will be closed on 12/20). **Please note: It is important you complete this step as we do not have the ability to import this data into Paycor Time.**

A report has been added to your database to assist you with this process. The name of that report is Archived Time Cards – People with Pay Desg Hours. This report pulls employees that

have hours whether they are active or terminated. You can navigate to this report by going into ToD > Reports > Shard Reports and finally to the Custom option in the dropdown menu.

From there, you will just need to edit the Period (date range) that you would like to run the report for and then run the report. We recommend pulling these reports in increments of 1, 3 or 6 months at a time depending on your employee count so that your file sizes stay small and the data is easier to reference in the future.

RETURN CLOCK HARDWARE (RENTAL CLOCK CLIENTS ONLY)

Duration: 10 min

You will receive a return shipping label after your live punch date via email from your Transition Consultant. You will need to package the clock, affix the shipping label, and ship it via UPS. **PLEASE NOTE: It is important that your rental clock(s) are returned within 30 days or you will be charged for the cost of the clock.**