



Everything  
You Need to  
Know About  
**Workforce  
Management**



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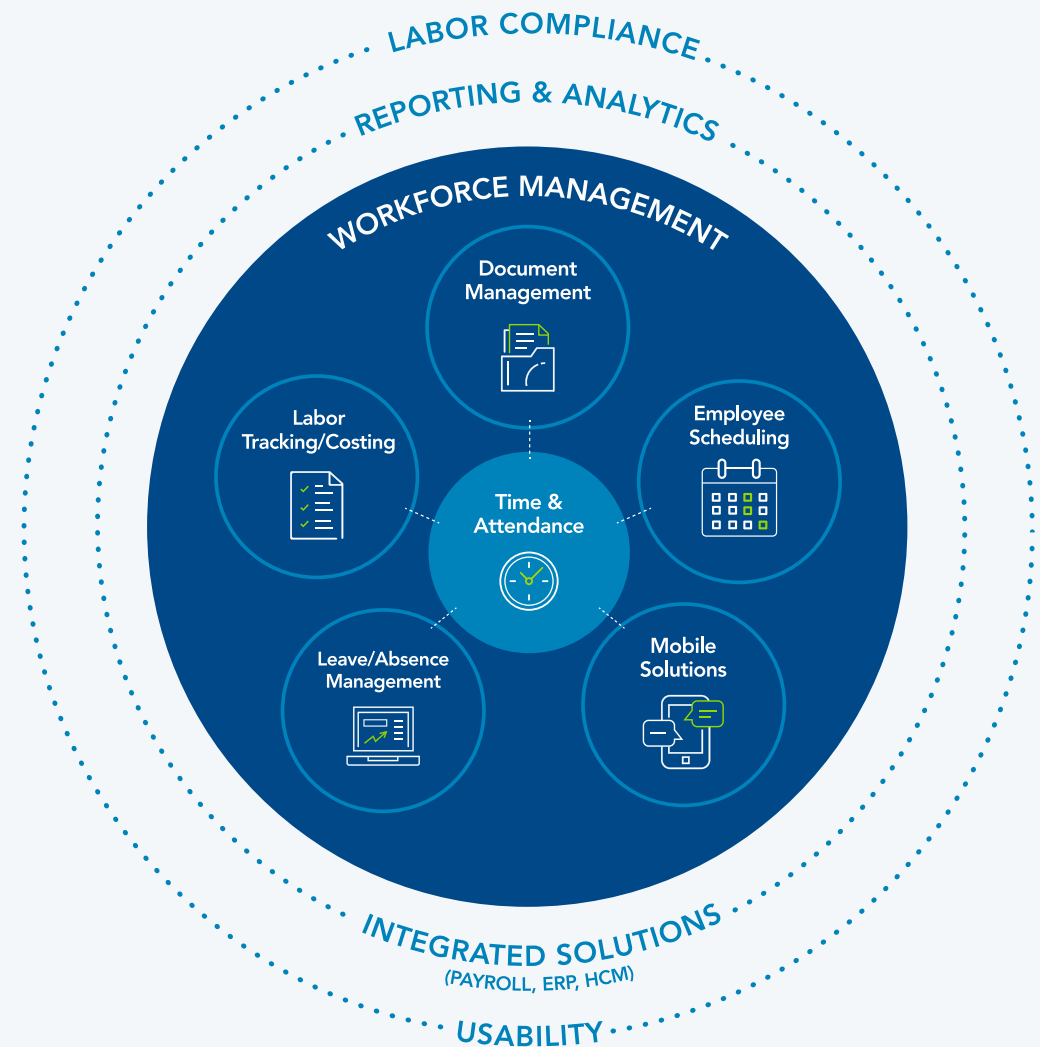
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## Are You Getting the Complete Package from Your Workforce Management Solutions?

True workforce management happens when all the key activities required to maintain a productive workforce integrate seamlessly into one package. In this eBook, chapter by chapter, you'll learn what robust workforce management looks like, and we'll show you how the TCP workforce management suite, powered by TimeClock Plus software, does just this.



Chapter

1

TIME & ATTENDANCE

# The Core of Workforce Management



# Technology is Vital to Robust Time & Attendance

Finding a time and attendance solution is often the first step when an organization wants to level up their workforce management approach. Maybe you – or your employees – are tired of manual timecards, or you’re finding it tough to get accurate reporting. Or maybe it’s a leadership desire to work smarter, not harder. Whatever the reason, time and attendance is where the journey begins when it comes to using the power of technology for better workforce management.

Workforce management is an organizational process that includes all the activities required to maintain a productive workforce, including managing mobile or remote employees, employee scheduling, leave management, and document management. Thanks to technology, workforce management now incorporates tools and software that support management, front-line supervisors, and workers across manufacturing, distribution, transportation, and retail operations. While robust, integrated solutions are key to true workforce management, time and attendance remains at the core of it all. Determining how your employees’ clock in and out, when they work, and what functions they perform while at work are all key elements of optimizing your workforce.

Time and attendance is also at the top of the list as an essential part of HR technology. It’s one of the ways HR needs to meet its core contract with employees, according to George LaRocque, founder of the HR technology research and advisory firm HR Wins.

“For many small functions, [adopting automation] means looking first at payroll, benefits, and time and attendance technologies. I’ve surveyed thousands of small businesses, and executives usually see the biggest ROI in those technologies because they want to see costs associated with those areas contained, measured, and managed,” LaRocque told the [Society for Human Resource Management](#) (SHRM).

With the COVID-19 pandemic forcing most businesses to adopt remote work, employers have an obligation and need to effectively track the hours employees work both onsite and remotely. Accurate time and attendance is both essential to meet requirements put forth under the Fair Labor Standards Act (FLSA), and important for effective operational management. As part of field management, data collection, budgeting, forecasting, scheduling, and analytics — time and attendance play an essential role in enhancing your overall workforce management strategy.

Integrated solutions are key to true workforce management, time and attendance remains at the core of it all.

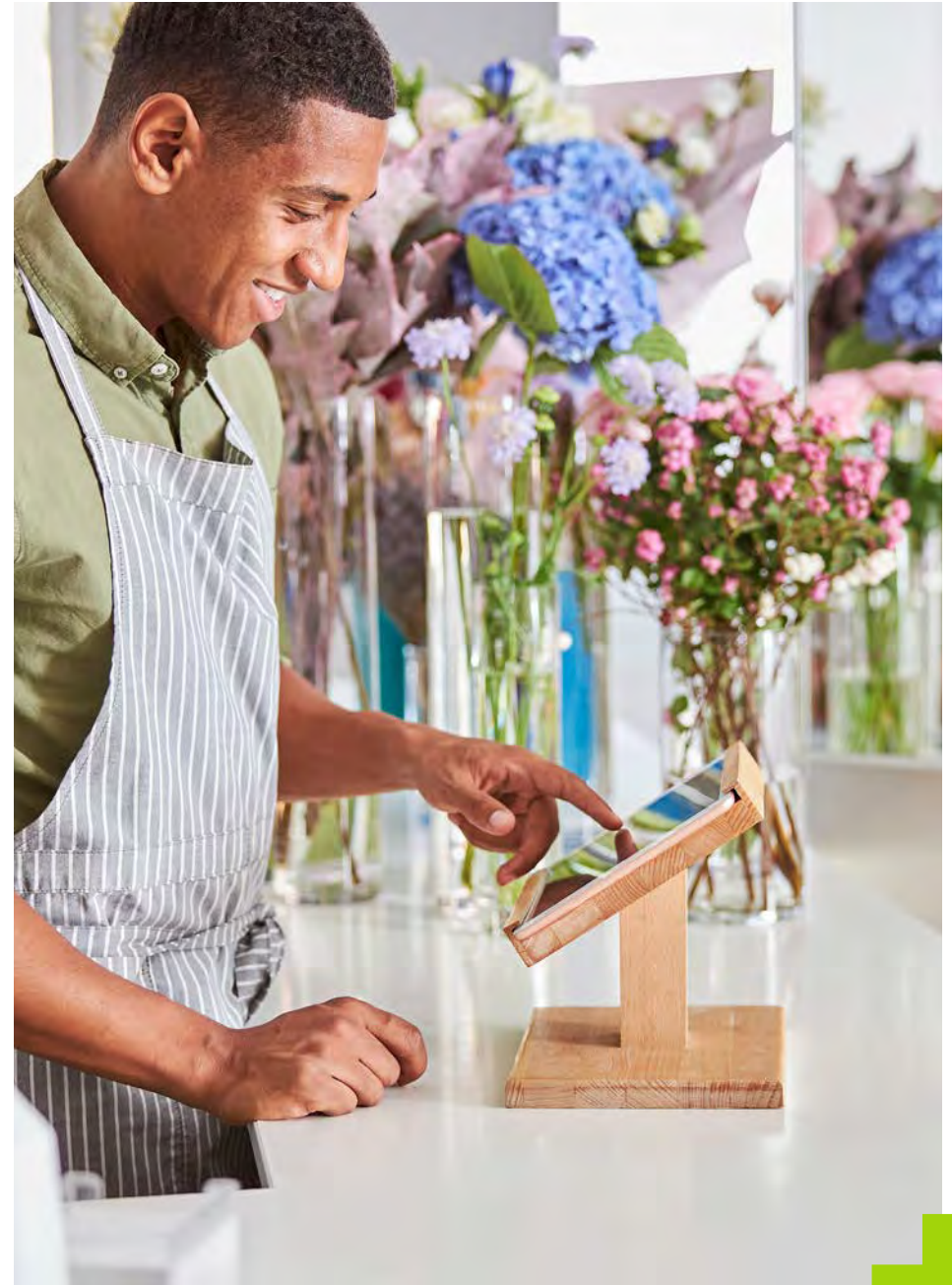


# How Time & Attendance Software Can Improve How You Manage Your Workforce

As the intersection of time and attendance with workforce management continues to deepen, it's essential for organizations to have a system that supports workforce strategies now and for the long term. This key component is no longer just about tracking time, it's now essential to improving employee engagement and key to what you need to support the business.

There are many ways time and attendance can support and enhance your workforce management. Three of the primary ways are:

- Automation
- Increased Employee Engagement
- Improved Business Decisions

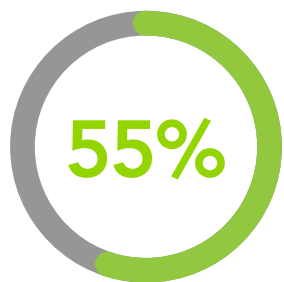


## Automation reduces errors & frustration

Automating your time and attendance system reduces the outdated and sometimes frustrating manual process that administrators, employees, and management must do to keep their records accurate. When you're relying on pen and paper, spreadsheets or other manual processes to track hours, there are many opportunities for errors. Automation reduces the chances for human error, which can save time and money.

Today's employees are accustomed to using technology in nearly every part of their lives, and work is no exception. They expect their employers to have efficient and accurate workforce management technology in place. Whether it is clocking in and out or having more control over their schedules, hours, or PTO, employees want visibility into their work records.

In fact, NOT having an automated time and attendance system to help ensure accurate payroll could be problematic when it comes to attracting and retaining talent. HR Dive reports that nearly 55% of members of the U.S. workforce are [impacted by payroll problems](#). That means trouble for employers. After experiencing just two payroll issues, almost half of all workers will look for a new job.



U.S. workforce members impacted by payroll problems

## Self-Service options empower employees

In addition to accurate payroll deposits in their bank, employees also appreciate the visibility of time and attendance systems. With the right platform, employees can access their data and see the same information as their manager (accruals, messages, requests). This type of transparency creates opportunities to fix issues and builds trust between employees and their managers. According to Gartner, 31% of CHROs say employee experience will [remain a top priority](#) in 2021.

Employees and managers, as well as HR and Payroll teams, appreciate the self-service functions modern time and attendance systems offer. Self-service features provide employees more access to their data and help streamline communication between employees and managers for time approvals, requests for paid time off (PTO), and even scheduling. For example, when employees request PTO, a notification is sent to their manager, ensuring that the request isn't missed.

Keeping time-related communications in one system helps managers and employees efficiently manage requests, approvals, and attendance issues. The two-way messaging in self-service allows employees to read and review manager messages when they perform a clock operation versus digging through their inbox for an email, they received weeks ago. Similarly, it's easier for managers to manage and track all time-related questions and issues for their employees in one place.

# Data informs & improves workforce decisions

Time and attendance data inform every aspect of workforce management. Reporting pulls information from time and attendance, leave management administration relies on the integration with time and attendance, scheduling is useless if you don't track what hours people work, and payroll uses calculations based on the records from time and attendance.

For organizations that manually process time worked and employee schedules, it's hard to achieve efficient and effective workforce management because time and attendance information isn't readily available and is not reliable. Without HR tech for time and attendance, errors and issues typically come to light at the end of a pay period – when hours are tabulated and reviewed. Or even worse, a time tracking error may become apparent only *after* you run payroll, requiring additional time and effort to correct. As for building your workforce management capabilities on time and attendance actions, that becomes next to impossible without technology in place.

But payroll and HR don't need to suffer through these time-related issues. Today's technology can put real-time data at your fingertips, making time and attendance relatively seamless and providing opportunities to leverage other workforce management capabilities that will help you drive business results.

"Our ability to collect and analyze data is evolving at an exponential rate. We collect vast quantities of data every second and are only beginning to understand the true potential impact it can have on our businesses," [states a recent Forbes article.](#)

"All this data is an ever-expanding mountain of gold, waiting to be mined and transferred into new, profound capabilities that will help us become more adept at predicting the future. Fundamentally, this capability transforms organizations from reactive environments -- being managed by static and aged data -- to automated continuous learning environments in real-time."

"Our ability to collect and analyze data is evolving at an exponential rate."

— Forbes

The Value of Real-Time Data Analytics





# Data informs & improves workforce decisions

With access to real-time data and reporting features, leaders and managers can make better- informed decisions quickly. For example, the data related to time and attendance can help:

- Compare job costs to help organizations understand what projects or work areas on which employees spend the most time.
- Examine absenteeism rates to understand the impact on loss in salary, productivity, and quality. Data from the [Bureau of Labor Statistics \(BLS\)](#) indicates that in 2019, nearly 3% of an organization’s workforce was absent on any given day.
- Analyze overtime expenses against [new overtime rulings](#) to determine if your model for exempt and non-exempt employees is working for – or against – your bottom line. And track the data to help you keep clear of the [common overtime errors](#) many organizations face.

Modern time and attendance software play a vital role in helping HR and business leaders stay on top of organizational goals and KPIs.



Average daily workforce absentee rate in 2019



# Six Features That Set TCP's Time & Attendance Apart

Some of the organizations we encounter, even those using an “electronic” timekeeping system, typically supplement time collection gaps by relying on manual or paper-based timesheets, email, and even “sticky notes” to manage employee time and attendance. Other employers believe that adding purpose-built time collection options to their time management will resolve any issues they're experiencing.

Based on our experience, we know that a robust time and attendance platform can and should include capabilities that will improve overall operations, from employee punch to payroll. TCP's workforce management solution is built on experience and a robust time and attendance foundation. That foundation is at the core of how we help organizations become more effective in managing their workforce.

It may be tempting to think of time and attendance as “just clocking in and out.” But the right system offers employers so much more than just a time clock.

Here are six important ways TCP sets itself apart from other providers...

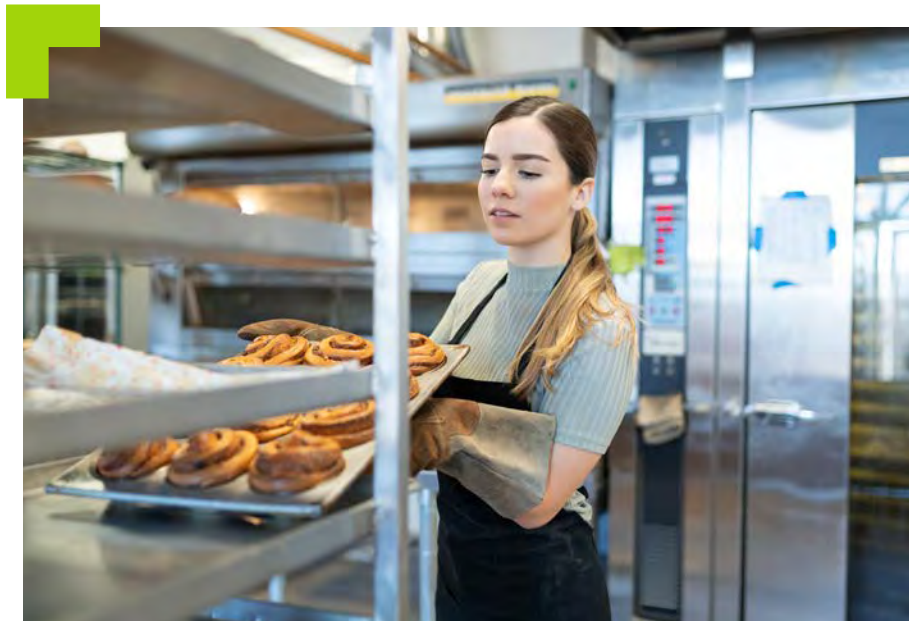


# 1

## Multiple methods to collect time

Each organization needs to collect employees' time worked in a feasible manner for the job, location, and employer need. TCP has a configurable, **customizable time clock** that can have up to five attachments or methods by which an employer can collect time.

Based on your unique needs, TCP can collect time via thermal sensors, fingerprint scanners, and badge-readers. We also offer a hand scanner clock, a USB option for a fingerprint scanner, a mobile app, and a browser-based time clock option. We have yet to hear of any competitor that offers so many customizable methods for time collection.



# 2

## Flexible job tracking options

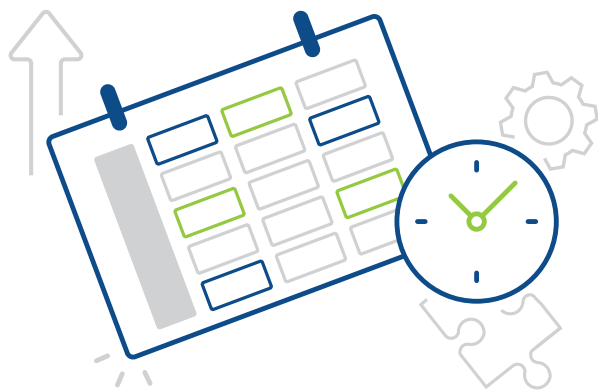
We realize that your employees wear many hats. And some of them may take on distinct roles that require different levels of work, job costs, and codes. That's why TCP enables you to track up to six layers of labor. Employees can have as many job and cost codes as necessary on their profile, and they can switch between those codes at any point.

This ability to accurately track jobs and roles enhances the precision of labor tracking. That flexibility in code selection creates a snowball effect of benefits that includes reporting, analytics, and improved day-to-day workforce management. Many of our competitors cannot match the flexibility of tracking that we offer.

## 3 Numerous options for labor & overtime calculations

Many organizations lose money and waste valuable time around labor and OT calculations. TCP provides numerous options that remove that risk of wasted time entering calculations and fixing related errors. We offer flexible pay periods, shift differential, and adjustable work weeks — by employee or department. For OT calculations, TCP includes 12 different threshold types: weekly, biweekly, daily, and others.

To address time and attendance needs that come up regularly, we have calculations in place to address such things as comp time and weighted overtime. Advanced overtime settings are also in place for situations such as when an employee works on a holiday. None of our competitors can match the breadth or configurability of the calculation options that TCP offers. We understand that to help our customers save time and money, it's essential to make calculations as dynamic and configurable as possible.



## 4 Dynamic accrual set-up

As you work on managing PTO and other forms of leave, it's important to have the ability to configure accruals in a way that matches your attendance policies. TCP provides some of the most flexible configuration capabilities in the industry.

Based on your needs, you can configure flexible posting periods, as well as accruals that distribute based on hours worked, or based on a flat rate. TCP also allows for negative balance limits, configurable caps and resets, and all settings can be adjusted on a master, departmental, or individual employee level.



# 5

## Expansive configurability

The risk of capturing data that is inaccurate or not useful for your organization can severely impact both your HR strategy and the larger organization. TCP is designed to offer as many configurable options as possible, including calculations, employee set-up, and employee interaction capabilities.

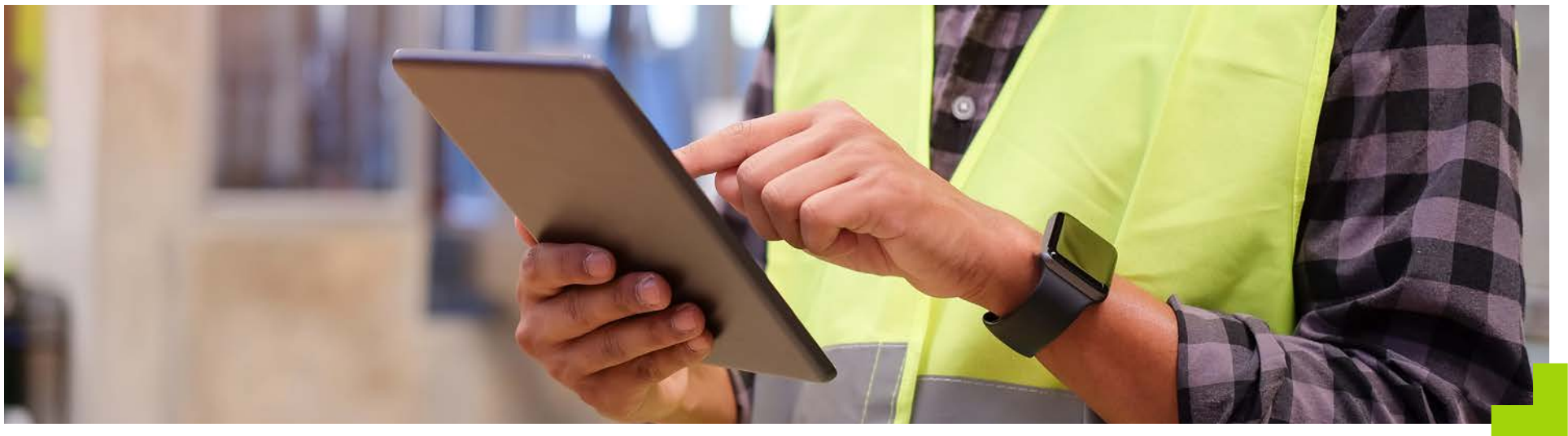
Our platform can adjust to most configuration needs. We're also not limited to one configuration – we can make changes on a level that applies to the organization, a department, an employee, or even individual timesheet segments. This level of configuration is unique to TCP.

# 6

## Extensive exception options & an interactive view

Exceptions are an important element in time and attendance tracking. They show anomalies in the hours an employee works. Whether it's shift exceptions, overtime comp time, a short or long break, missed punches, or nearly 30 other exceptions, TCP helps organizations efficiently track the data they need to optimize their employees' time.

Thanks to notifications and settings in TCP, managers can be notified of exceptions, view those irregularities, and take any necessary action. In our platform, there's no need to run a report to verify; these exceptions are available on-screen and in real-time. This interactive view of hours also enables managers to view exceptions and make the changes as needed.



# Integrations Level Up Your Workforce Management

At TCP, we believe robust time and attendance solutions aren't complete until they are integrated with your payroll and ERP/HCM systems. Our customers frequently [rave about how these integrations](#) can take related processes, like running payroll, from days to hours.

## Payroll Integrations

We work with all the major payroll providers, including ADP, QuickBooks and Sage, to offer specially configured payroll integrations. Whether your integration is seamless, a one-click, pre-coded module, or a flat-file export, we make it happen.

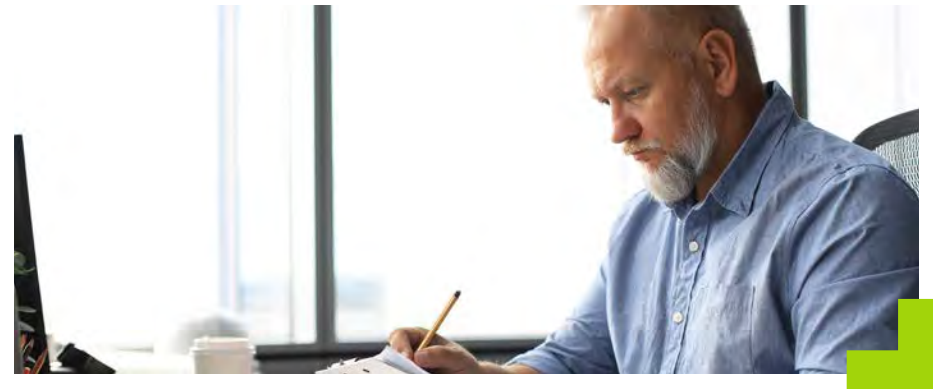
[View all TCP's payroll integrations here.](#)

Don't see your payroll provider? We maintain relationships with payroll providers to create the integration your organization needs and to ensure you have the best customer service.

## ERP/HCM Integrations

Sometimes even the most robust Enterprise Resource Planning (ERP) or Human Capital Management (HCM) solutions lack time collection capabilities sophisticated enough to meet your needs. Our time collection solutions are built to operate with your existing business system(s) and can result in substantial savings. Optimized data handling, seamless communication and industry leading labor calculations helps you complete your time and labor strategy with a more comprehensive solution. We integrate with PeopleSoft, Oracle HCM, SAP and Workday to deliver the capabilities you need.

[Learn more about our ERP/HCM Integrations.](#)



# Questions to Ask About Your Time & Attendance Tool

As part of your process, keep in mind that a single, fully integrated solution that meets multiple requirements is better than using two, three, or four disparate systems to achieve your workforce management strategy. Ensure that your time and attendance system is dynamic and evolves to keep up with the growth of your workforce. Organizations must examine important factors and ask questions as they seek out potential time and attendance and workforce management solutions.

- What is the current time tracking process? Do we have complex or changing needs we're not meeting today?
- Do we want a solution that can be mobile and adapts to the needs of various worksite locations?
- Do we want a system that can integrate with our payroll software?
- What will our workforce look like in the future? Can we expand our time and attendance approach to satisfy new requirements?
- What are the workforce and time and attendance reporting and analytic capabilities we need?

With the big picture in mind, identify your organization's unique needs and non-negotiables. Then do your best to find a single system that offers everything you need to support the business from a workforce management perspective. When a time and attendance system is thoughtfully implemented as part of your larger workforce goals, you can automate outdated processes, improve employee engagement, and make better-informed business decisions.

Time and attendance are at the heart of what TCP does, and it's where we began. How your employees' clock in and out, when they work, and what they work on are the core workforce optimization. We've taken what we know about time and attendance and evolved the TCP platform to offer an expansive range of workforce management capabilities. Each component has been carefully designed to support the needs of each organization.

## Get a Live Demo

Reach out today to learn more and schedule a demo with one of our consultants.

[SCHEDULE A DEMO](#)

Chapter

# 2

SCHEDULING

# Reduce Workforce Friction with Integrated Scheduling





# Any Way You Look at It, Employee Scheduling Is Complicated

It seems like simple advice when a manager hollers, “Check the schedule for your next shift” as an employee leaves for the day. But the reality is, scheduling is one of the most complicated aspects of running a smooth operation.

Integrated solutions are essential to accurate workforce management. Scheduling is a key area where the right solution can streamline processes and procedures to relieve organizational and employee issues that you may not have even realized. Aside from receiving accurate pay, it's likely that an employee's schedule is one of the most relevant aspects of their work experience.

Consider the following scenario...

It's a playoff game during football season. Everybody is at the grocery store buying snacks and people are impatient to get home in time to watch the game. Looking at the long lines at each register, the store manager realizes one employee is more than 30 minutes late. He dials the employee's number, hoping she's on her way to work.

*“Why aren't you here for your shift?” he asks when she picks up.*

*“I checked the schedule on Tuesday. I'm not scheduled to work until next week,” says the employee.*

*“I updated the schedule on Thursday because we had a few last-minute changes. Didn't you see the latest?”*

*“I haven't been at the store since Tuesday, so I had no idea,” says the employee.*

*The manager is frustrated. He knows there must be a better way to communicate schedules than posting them on the wall or calling employees every time there's an update. But he can't think about that right now – the customers are getting restless.*

Regardless of your industry or business, if you're in charge scheduling, there's a good chance you feel this manager's pain. Unfortunately, scheduling is one of the most complicated business elements and one of the most critical aspects of operational success. You can't maximize business results without the people there to help you do so.

# Scheduling Doesn't Have To Be Hard, It Starts with an Integrated Approach

HR technology offers a way to address scheduling issues through proactive workforce management – the organizational process that comprises all the activities required to maintain a productive workforce, including:

- Tracking employee time and attendance
- Managing mobile or remote employees
- Creating schedules
- Administering leave management
- Maintaining and managing employee documents
- Integrating with other business systems, including payroll and ERP

Not only are integrated solutions essential to accurate workforce management, but organizations also need a platform that will adapt and flex to their unique needs. Whether it's tracking time and attendance, creating schedules, or integrating with payroll, you need flexibility and configurability in your system.

“The reality is that nonstandard work schedules are common, and every organization that is reimagining the workplace should be cognizant of the pros and cons of implementing them. Schedules can affect a host of important outcomes for employees, both personal and professional,” [according to Harvard Business Review.](#)

Many organizations don't know what they're missing – in terms of employee and operational effectiveness – by not having scheduling integrated with their other systems and tools. When you have a robust workforce management system in place, you have all the information you need to avoid issues like the previous scenario, thanks to an integrated approach.



# How workforce management solutions solve scheduling issues

Even with the technology available, many organizations with hourly employees or shift workers on staff still rely on paper schedules, cumbersome spreadsheets, or outdated backend systems that employees can't access. In these organizations, you'll find the schedule posted on the backroom wall or other central location so that employees can find out when they work next. This approach may suffice when schedules don't need to change. But what happens when they do need to change?

"It is clear that volatile schedules can create tremendous stress and hardship for employees and their families. This is especially true for workers in positions that do not pay well and offer limited benefits," according to the authors at Harvard Business Review.

In many organizations, schedule changes occur daily – if not hourly. Managers and shift supervisors might even say that despite their best efforts, schedules are living documents. The reality is that employees need to swap shifts, special circumstances require adding more labor, people get sick. Managers change and update schedules to fix gaps and ensure the right people are in place. With so much volatility on the scheduling process, and without a convenient way to access the current schedule, it can be tough for employees to know where they need to be and when.

Without workforce management solutions that integrate and include key scheduling capabilities, it can be next to impossible for managers to know what's going on with their teams and even more challenging to manage shift overages and overtime costs effectively.

Organizations such as healthcare providers may have multiple locations, 24-7 operational hours, and traveling workers. All these factors create unique scheduling challenges. Keeping track of these schedules requires significant time and energy that many operations don't have.

## Consider this...

A nurse in the emergency department at your hospital agrees to cover a shift to allow another nurse to take a weekend trip with family. Last minute, you realize this change puts the nurse covering the shift into overtime hours you cannot afford. Now you have to break it to your employee that their weekend plans are ruined.

## How workforce management solutions solve scheduling issues

Without a central workforce management system, managers must review multiple spreadsheets, request forms, and data points to schedule each employee properly. These outdated systems make the scheduling process ripe for errors. In the healthcare industry, managing overtime is particularly essential to ensure employees aren't burdened by too many shifts and reduce perceptions of favoritism around shift assignments. In this environment, accurate and smart scheduling not only impacts the organization budget and employee satisfaction, but it also affects patient safety.

There are also labor laws and state requirements regarding hours worked. For example, in California, there are unique [regulations regarding overtime](#). In Seattle and other localities, employees earn [sick and safe paid time off](#) based on the number of hours they work. A flexible system that adapts to your organization's needs is an important way to ensure you're meeting local and federal compliance regulations.





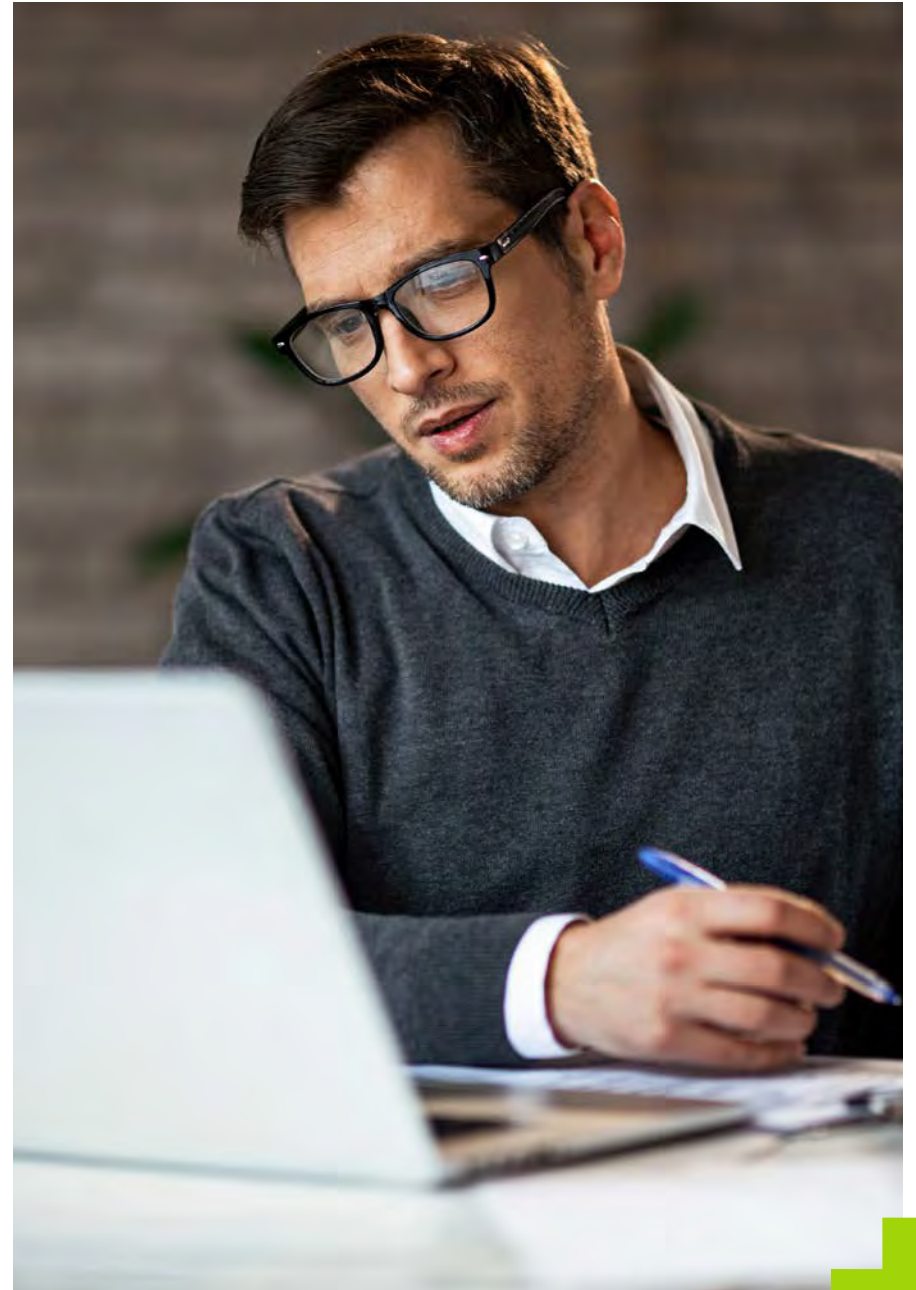
## Important capabilities for scheduling

Week after week, month by month, schedules need to be created repeatedly. Making the employee schedule to cover various shifts is an important, but thankless, role in many organizations. When a schedule is managed effectively using a scalable, repeatable process, productivity is off the charts, and labor costs come in at -- or under -- budget.

The person or people who manage the schedule not only need to know each employee's availability, but also their role, skillset, and in some cases, the hours they're working in other parts of the organization. (That's all information that can easily be lost if it's posted to the schedule on a sticky note!)

The good news is that HR technology has made this task much more manageable for every size company. In the past, only large companies could afford to purchase systems that would help automate scheduling. Thanks to cloud-based platforms, scheduling automation and robust workforce management are an option for any organization.

When a schedule is managed effectively...productivity is off the charts, and labor costs come in at—or under—budget.



## Important capabilities for scheduling

Some of the fundamental ways that scheduling software supports organizations include:

**Flexible schedules and configurations** allow managers to pivot shift coverage quickly or reassign a shift to another employee. This flexibility helps when people are out sick or are using other paid time off.

**Reporting** is a crucial benefit to view and compare scheduling data against hours worked. Variance tracking also enables Payroll, HR, and leadership teams to assess scheduling from a strategic perspective for organizational impact and analysis.

**Employee access** to schedules improves engagement and efficiency. When employees can see their schedule online, make schedule requests, and communicate with their manager about changes, they're empowered to participate in the process, helping to make it more efficient and productive. Some systems even provide the ability to create push notifications about schedule changes or to send reminders when it's time to work.

**Interdepartmental communication** and views provide enhanced organizational visibility. This is great for multiple departments or locations and employees who work in multiple departments. This view of all an employee's roles and departments where they work reduces the chances of scheduling an employee in two locations at once, helps keep unnecessary overtime in check, and ensures compliance with hourly regulations.

### Consider this...

A Lieutenant in your police department needs a day off. There are plenty of officers willing to cover the shift, but this shift can only be covered by another lieutenant. How can you make it easier to find replacements with the proper qualifications to cover the shift?



## Software solves common scheduling issues

Two recent HR industry studies found that while the Covid-19 pandemic changed organizations' spending on traditional HR technologies, many still invest in the systems required to support remote work, [according to the Society for Human Resource Management](#).

One of the studies attributes the desire to upgrade systems to an increased need for "time management technologies with time tracking and scheduling applications that are highly configurable." They also found that 36 percent of organizations practiced workforce planning in 2020, which was much higher than in previous years. Now more than ever, HR functions need workforce data and tools they can leverage to provide answers and make workforce plans – even during challenging times.

Now more than ever, HR functions need workforce data and tools they can leverage to provide answers and make workforce plans



# Software solves common scheduling issues

As you consider what your organization needs from a scheduling tool, there are vital features to consider. Necessary capabilities to think about scheduling and workforce management solutions include...

- **How does the system allow employees to view schedules?**  
A schedule created in a vacuum is not going to help anyone. Even if a manager uses technology to create a schedule, it's only useful if they have a way to deliver it to employees. Look for solutions that enable employees to check and view their schedule, regardless of their location. You also want to provide a way for them to view historical data about their hours and the shifts they've worked. Without these capabilities, employees may suffer due to miscommunication, lack of job satisfaction, and even burnout.
- **Can the system meet individual department and team needs?**  
Your medical office staff may have standard hours, but your on-call nurses work various hours and shifts. Each department and team may schedule differently, which means you need a solution that fits multiple scheduling needs.
- **Will the system help identify and control overspending in labor?**  
When it comes to schedules and time tracking, you don't know what you don't know. Suppose your scheduling system is separate from time and attendance. In that case, labor variances or issues will come to your attention when the pay period closes, which may be long after they

occurred. Managers need to be able to view exceptions so they can follow-up on employee time entries and data. Rather than asking managers to dig deep into data files, try to find a system that flags issues, alerts managers, and raises awareness regarding any employees who are close to reaching overtime limits or who aren't keeping to the schedule (e.g., arrive late and leave early).

- **Is there a way we can examine scheduling against workforce management trends?**  
Scheduling is a crucial component of workforce management, and as such, you need data that will provide a perspective about schedule variance and trends. With integrated reporting capabilities, workforce management systems empower managers by allowing them to view productivity trends in schedules and hours worked.

Just as your scheduling capabilities have outgrown the calendar-on-the-wall method, you want the workforce management you choose to grow and flex to meet your needs. As with any HR technology solution, it's best to find a fully integrated solution that meets multiple requirements.



# Five Features That Set TCP's Scheduling Capabilities Apart

Based on our experience, we know that scheduling should improve overall operations and ensure you have the right people in the right place at the right time. For today's employers and employees, scheduling is much more complicated than posting a calendar on a wall. We offer a variety of scheduling tools to support how your organization achieves results. With [TCP's scheduling solution](#), powered by TimeClock Plus software, you can build and manage schedules, create recurring schedules, set up exceptions, and download reports to optimize your workforce.

Here are five important ways TCP sets itself apart from other providers...





# 1 Flexible scheduling options

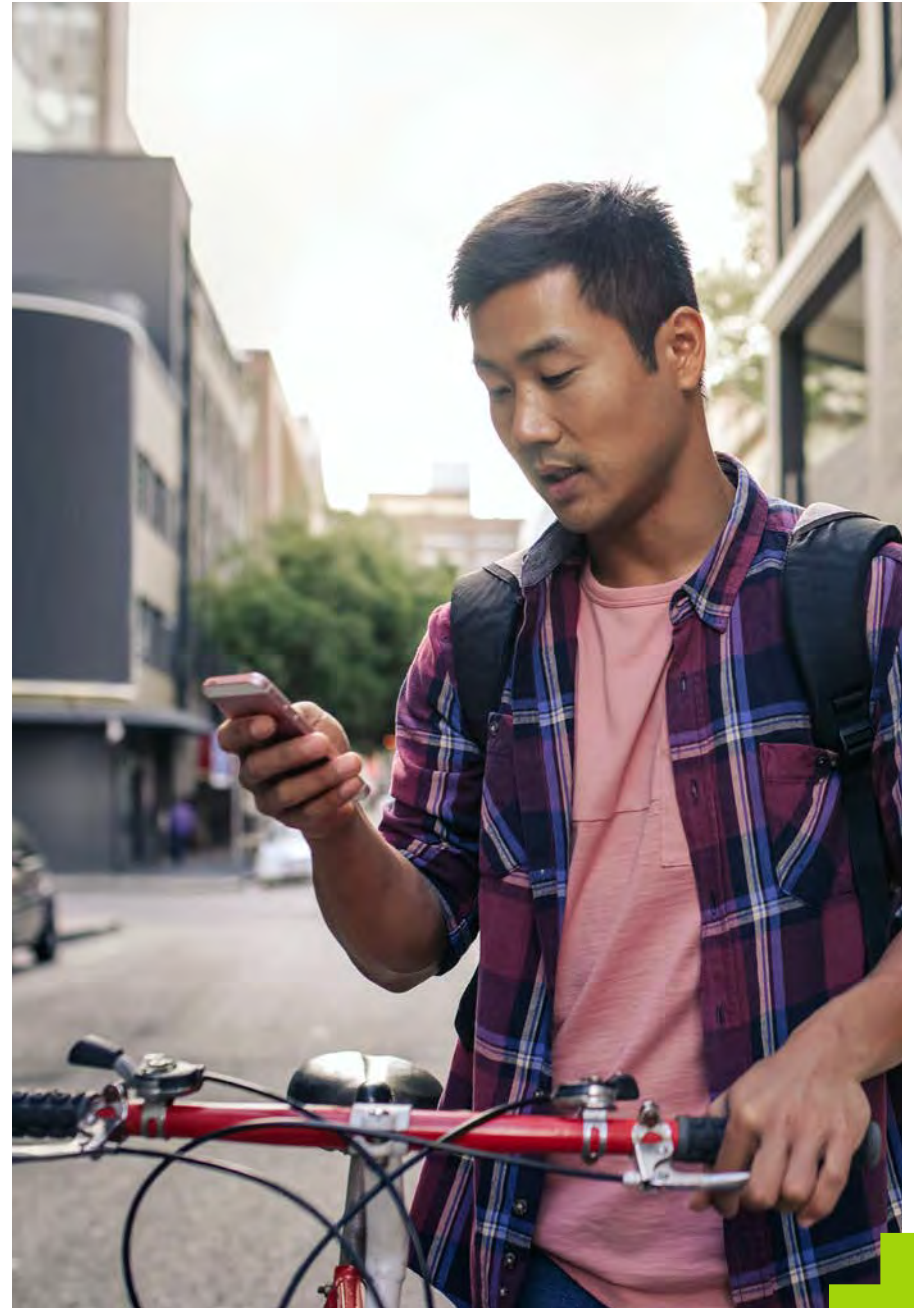
Schedules in our software can be set up on an ad hoc basis to recurring 9 to 5 hours, and anything in between. You can also deploy specific schedules for different environments. The easy-to-use interface allows you to drag and drop shift assignments, as well as view coverage percentages to ensure the right people are scheduled at the right time.

# 2 Employee accessibility

We make it easy for your workforce to access their schedules on any electronic device. With this ability, employees are empowered to manage their schedules remotely, trade shifts, and request days off. Organizations also have the flexibility to allow employees to change their schedules without manager input if desired.

# 3 Integrated workforce management

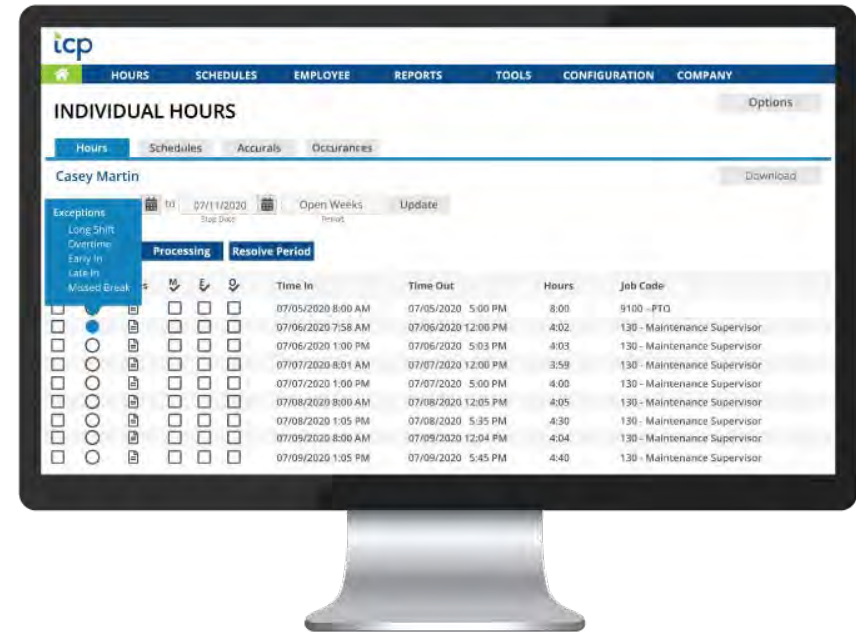
Thanks to seamless configuration, you're able to integrate scheduling with our time and attendance, leave management, and other capabilities.



# 4

## Regulatory compliance

In the TCP system, you can create rules to ensure that laws are followed and, overtime is appropriately applied. This helps ensure compliance with federal, state, and local labor laws.



# 5

## Exception tracking

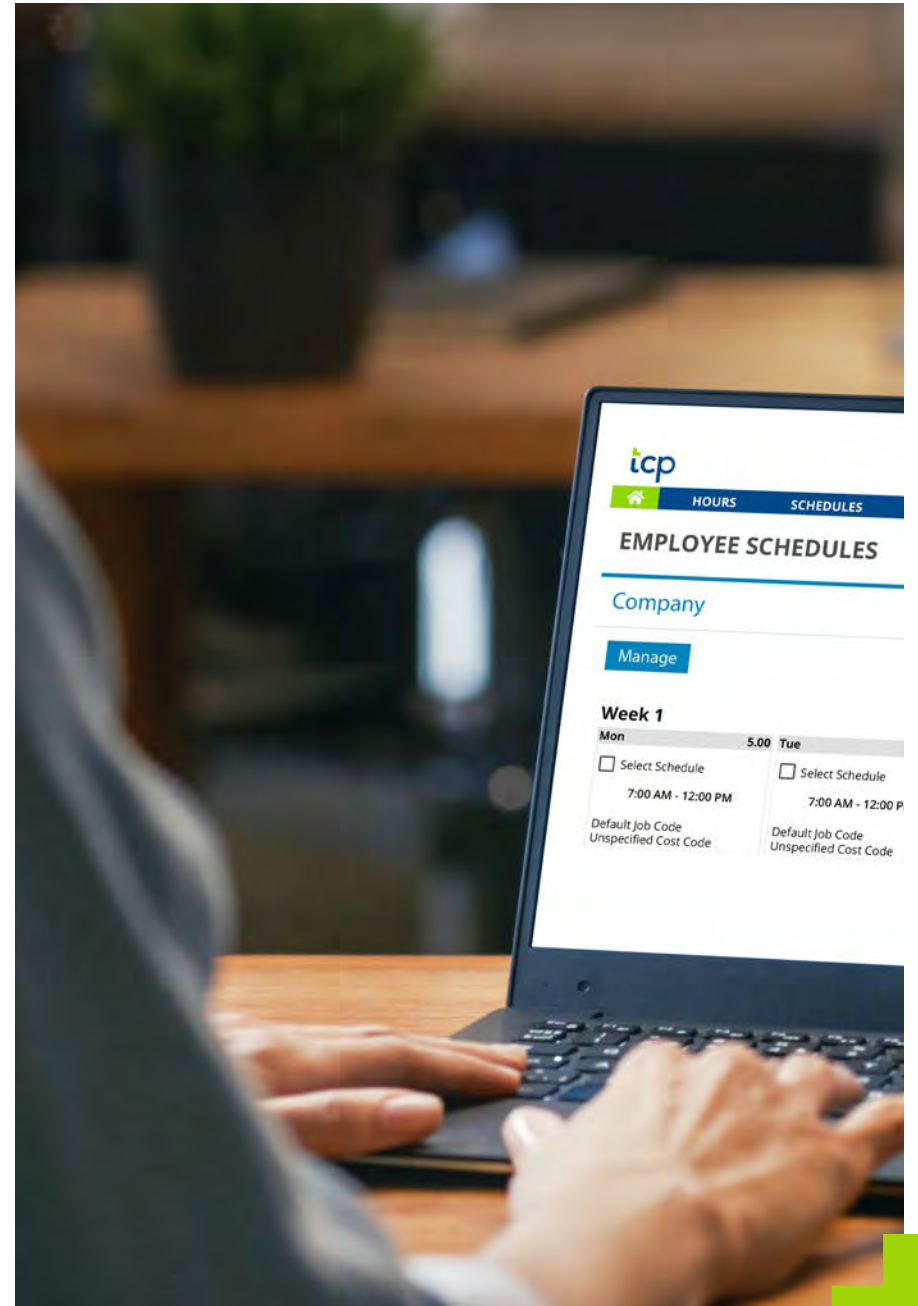
We know that organizations need to monitor schedule anomalies, such as late arrivals or missed shifts, and take action to resolve issues. Our TimeClock Plus software allows users to define the types of anomalies they wish to track, and you can also set up notifications based on these actionable occurrences.

# You Can Schedule Better with TCP

Scheduling is about having the right people in the right place at the right time. But the long-term impact extends far beyond that weekly or monthly schedule. Effective, efficient scheduling built with a modern system can help cut costs, ensure compliance, and provide workforce management and planning data that informs business decisions.

Find a solution that offers you scheduling support but also provides what you need when it comes to workforce management. When you have a flexible, real-time scheduling option that includes opportunities to analyze vital operational data, you can improve employee experiences, support managers, and make changes that impact your business.

Reach out today to learn more and [schedule a demo](#) with one of our consultants.





Chapter

3

ABSENCE & LEAVE MANAGEMENT

# Leave Management Tools That Flex to Meet Your Needs



[www.tcpsoftware.com](http://www.tcpsoftware.com) | Your Workforce Ally



# How Would You Grade Your Organization's Leave Management?

Many employees don't have a clue how tough it is for organizations to manage everything related to leaves of absence or time off – even if it's just for one day. From the employee's point of view, when you need to take a sick day, you let your manager know and it's done.

Despite that being a seemingly "simple" request, employers are all too familiar with the difficult job of managing leaves. More than half (56%) scored a C, D, or F for their absence practices, according to the Absence and Disability Readiness Index published by The Standard. The survey results also indicated that fewer than half of employers say they believe their programs are well managed.

Indeed, due to local, state, and federal regulations, managing leave can be one of the most complicated issues for HR and payroll teams. With so many compliance issues related to time off—as well as rules developed by the individual organization—managing, reporting and paying employees for time off isn't simple at all.

Thankfully, integrated workforce management tools can help improve the leave management process.





# The High Cost of Ineffective Leave Management

Many factors related to time off must be tracked – whether it's one day or three months' leave. For example, organizations must:

- Adhere and comply with leave requirements based on industry, location and job type (e.g., hourly, salary or union)
- Evaluate leave requests based on organizational policies
- Monitor employee leave limits and paid time off balances
- Determine coverage during an employee's absence

As your organization grows, leave management becomes more complex. It's too risky for HR teams to manage leave balances with paper forms and disparate legacy systems make gathering real-time data to approve or deny leave requests an onerous task.

Aside from the difficulty of effectively and efficiently managing and tracking data, there are two additional pain points related to leave management: compliance risk and the costs of excessive absenteeism.



## Compliance risk

Only two out of five employers in the [Absence and Disability Readiness Index](#) were using a system to track absences covered by the Family Medical Leave Act (FMLA). When this type of highly regulated leave is left to manual processes, you're risking your organization's ability to maintain compliance.

"Mastering leave management is a necessary challenge. The overlapping (and ever-increasing) patchwork of state and federal mandates make it an area of particular concern for employers," according to [HR Dive](#).

Indeed, there are important federal leave requirements to meet, such as FMLA, but HR and payroll must also effectively manage time off and leaves of absence based on organizational policies and rules. Without integrated workforce management tools, handling these complex situations can lead to incorrect pay, inaccurate accruals and disgruntled employees.



## Excessive absenteeism

Even if you're able to effectively administer leave and manage federal and local regulations, if you're using legacy systems or manual methods, you're not uncovering or addressing the costly issues related to employee absenteeism.

Unfortunately, for some organizations, excessive absenteeism is considered a "cost of doing business." According to the [Society for Human Resource Management \(SHRM\)](#), "many firms still underestimate the magnitude of the problem of employee absenteeism."

But the costs of absenteeism add up. In 2019, full-time wage and salary workers had a total of 117,383,000 absences, according to the [Bureau of Labor Statistics](#). To put that into perspective, the [Center for Disease Control Foundation](#) reports that "productivity losses linked to absenteeism cost employers \$225.8 billion annually in the United States, or \$1,685 per employee."

The full impact of costs related to ineffective leave management—whether they are due to increased legal risks or an inability to manage absenteeism—can be costly. No matter how tough leave management may be, a trusted workforce management solution is essential if you want to streamline processes, protect your business and boost your bottom line by managing complicated leaves and payroll.

Read more on this topic ["5 Ways Time Tracking Boosts Your Bottom Line"](#)

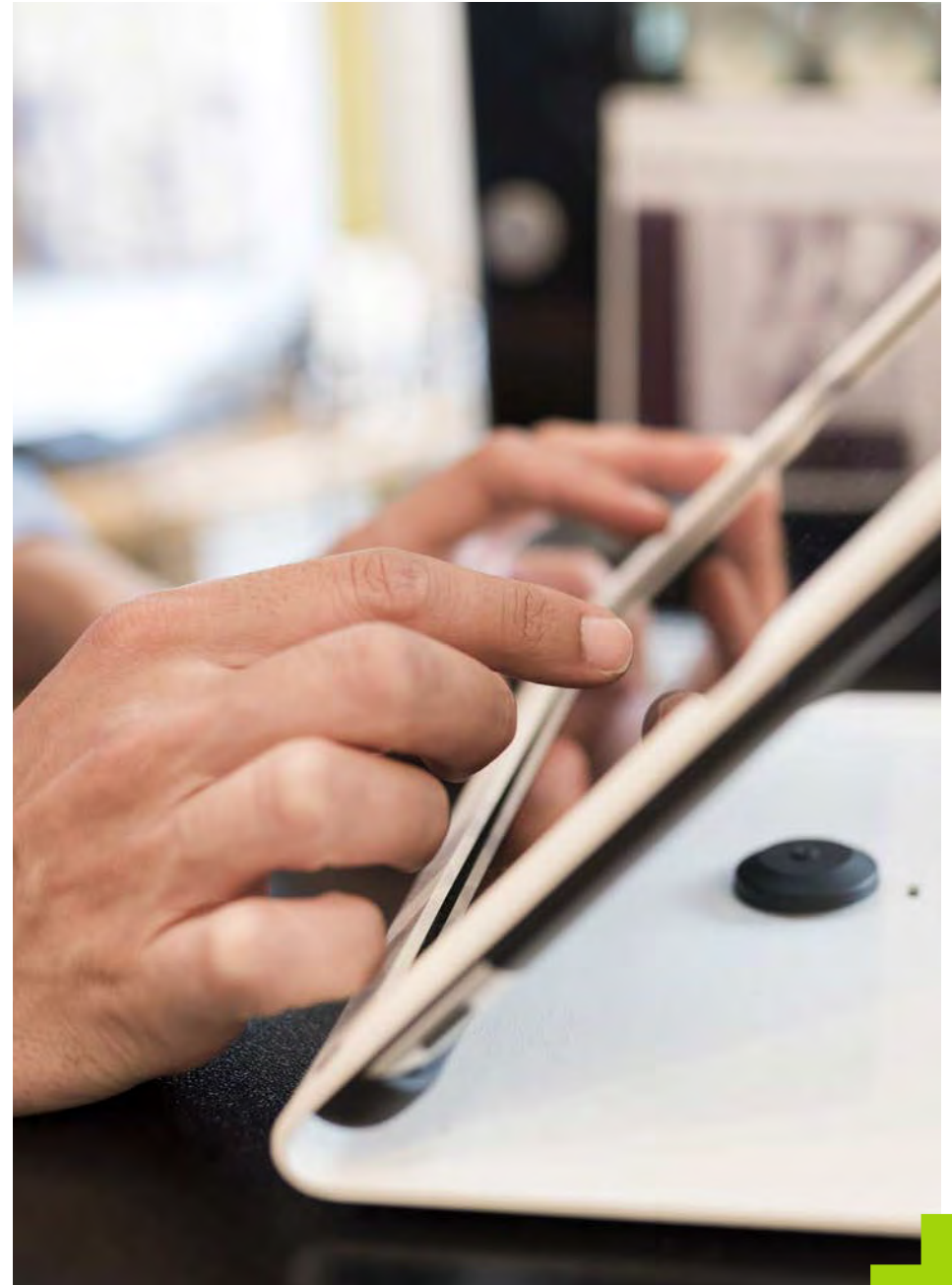
# The Benefits of Integrated Leave Management

Having leave and absence management integrated with your time and attendance, payroll and scheduling saves a lot of manual work and ensures greater accuracy.

At the foundational level, workforce management software can address many common leave management issues. Fundamental system requirements for leave management should:

- Provide accessible means of electronically submitting leave and time-off requests
- Give employees and managers real-time access to time off balances
- Manage a leave schedule that grants adequate insight into the workplace
- Embed policy and regulation requirements
- Establish protocols for who receives, reviews and approves requests

As you consider [innovative leave management solutions](#), also look for a system that will meet your compliance and legal requirements, that will flex to your organization's needs, and that integrates with your overall workforce management approach.





## Meet compliance & legal requirements

A powerful solution will allow you to account for a variety of factors that impact leave, such as job level, employee location and union status. As you manage compliance risks, you want a comprehensive view that will help you audit the process. At the same time, you want a micro-view that allows you to easily pull up data to view accruals for employees. Employees also need to be able to view their current earned and accrued leave status. Ideally, your system should also provide a dedicated FMLA workflow that automatically tracks FMLA-related leave (including requests and required documentation). This helps you stay compliant with the regulations and avoid the cost of a mishandled FMLA case.



## Support your organization's policies

You want a solution that accommodates your policies, rather than one that forces you to change your policies because of system limitations. Consider how the system establishes workflows that best fit your organization. For example, can it be configured for the necessary levels required to approve and administer short-term disability or parental leave? Can you implement and enforce any blackout dates in the system for vacation requests?

Make sure the system also empowers managers. Look for notifications and easy methods they can use to review, approve or deny requests for time off—ideally without having to log in, switch systems, or dig through emails. In addition to managing the process of taking leave, these capabilities help managers keep an eye on absenteeism before it becomes a problem. Similarly, make it as easy as possible for people managing benefits to handle any long-term leave requests.

These capabilities help managers keep an eye on absenteeism before it becomes a problem.

## Integrate with core workforce management functions

As you face workforce challenges, such as those during the COVID-19 pandemic, you need a system that you can quickly update based on unanticipated situations. In the case of COVID-19, many organizations without leave management software struggled to quickly implement the [Families First Coronavirus Response Act \(FFCRA\)](#) as part of their policies and processes. Amidst a chaotic time, it's key that your leave management policies and the system responsible for administering them are updated so everyone has access to the most accurate information.

Given the complexity of leave management, it's ideal if all the workforce information you need is readily available in one system. Leave requests are a key part of scheduling, employee hours and payroll. When creating schedules or running payroll, it's a time-consuming and error-prone process to switch between systems.

There are many bottom-line benefits of having an automated leave and absence management system, but perhaps one of the biggest and often overlooked advantages is that with the right software in place, managers and HR teams have more time to connect with employees about their leave—whether it's time off for a vacation, to welcome a new baby or to care for an elderly parent. Employees may appreciate the opportunity to talk about their life outside of work.

If it's a long-term issue, managers can show care and concern for the circumstances that may be affecting attendance or requiring a prolonged leave. Similarly, HR teams have an opportunity to provide information about company-sponsored resources that may help, such as physical or mental health services. Treating employees with this level of care and concern builds trust and reinforces the organization's commitment to its workforce.





# The Flexible Leave and Absence Management Solution

TimeClock Plus software was built on the idea that it's important to provide the level of flexibility and configurability our customers need to run their organization.

With our complete workforce management approach, you can easily integrate leave and absence management with a time and attendance solution, as well as your scheduling configuration. This type of integration allows for instant, automated calculations that transfer seamlessly between all of TCP's workforce management solutions.

For those customers looking for help in managing FMLA, human resources can manage and monitor FMLA within the leave system. With [TCP's leave management solution](#), there's no need for a separate solution or tracker. Our FMLA feature also lets employees select the type of leave they want to request. This simple step makes it much easier for HR to process and track time off.

Depending on your industry, we also understand you have specific needs. You want to find one integrated system that allows you to administer leave management and empowers your workforce management strategy.

Some of the ways we've seen our solution play out in various industries include:

- **Healthcare:** If a provider (nurse, aide, doctor) requests time off, managers need visibility to schedules and paid leave balances before approving the request. They also need to view overtime totals before assigning the shift to another employee.
- **Public Safety:** Depending on the policy, a police department may require more than one lieutenant to be on a shift. With integrated workforce management, schedulers can quickly identify any gaps that a leave request might create.
- **Manufacturing:** If production drops, an integrated workforce management system provides comprehensive leave data that will highlight possible correlations between absenteeism rates and productivity.

TimeClock Plus software was built on the idea that it's important to provide the level of flexibility and configurability our customers need to run their organization.

# Specialized Solutions for Locating Substitute Workers



Every industry has different concerns, and TCP works with our customers to ensure our solutions meet their needs. For schools and other organizations that need to manage large populations of substitute workers, our Substitute Management tool ties scheduling and leave management together. We understand the time, effort and organization it takes to locate, contact and schedule substitutes. Thanks to our [automated Substitute Management solution](#), the days of using the antiquated phone tree to find a substitute are over.

Using a preferred list configuration and notification hierarchy, administrators can set up lists to make sure the best substitutes get notified first. We also use qualification-based notifications to avoid unnecessary confusion—notifications go to the right people so you don't send an over or under-qualified substitute to a job.

Substitutes can receive and accept offers and view real-time schedules from their desktop or mobile device. Thanks to seamless integration and real-time processing, subs can view offers as soon as they're created. Administrators have a real-time view of the leave request calendar that enables them to immediately search for substitutes and see when an opening has been filled.

Whether your situation is standard or one of a kind, our leave and absence management solution can be configured based on your unique policies, hierarchy for approvals and accrual configurations.

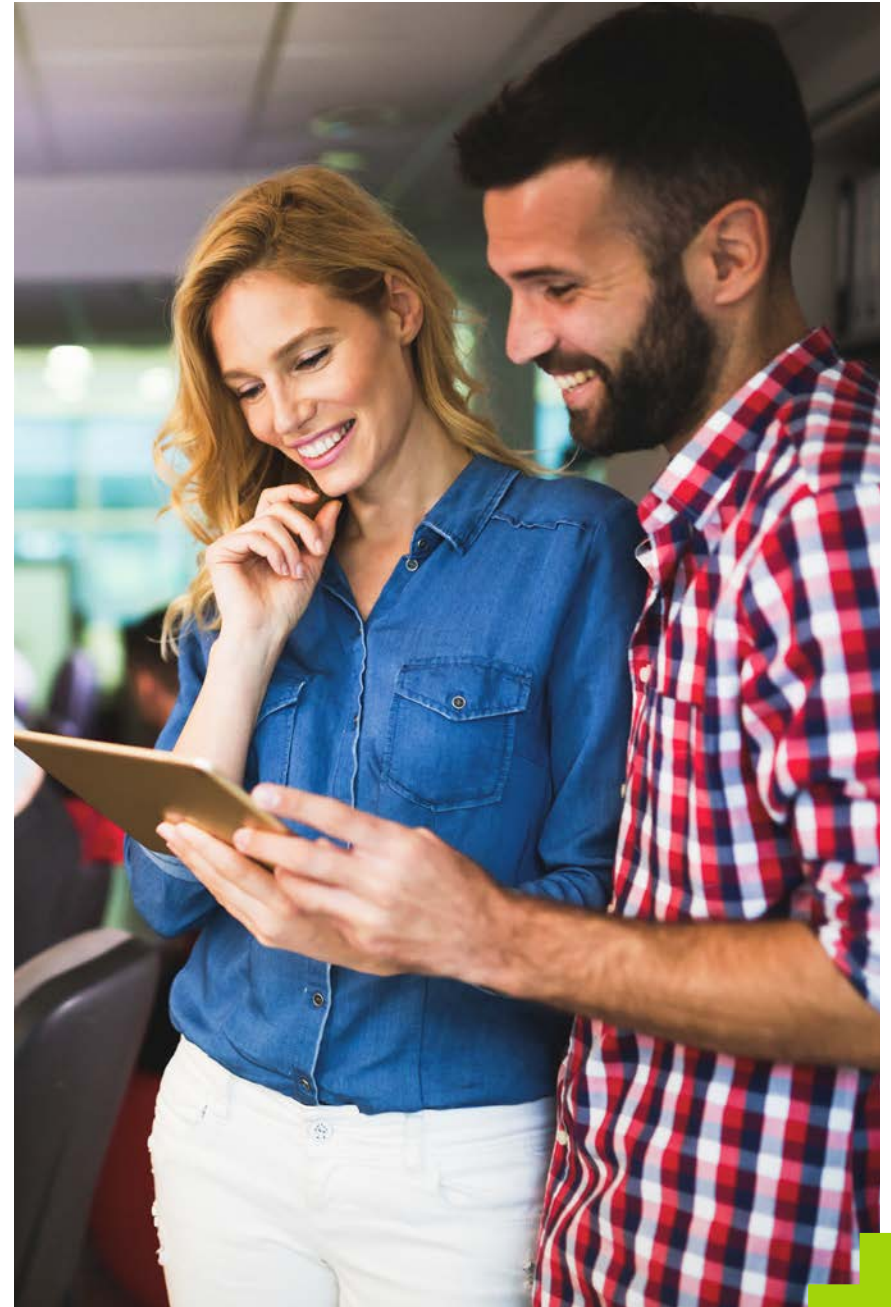
# Integration to Empower Your People & Your Organization

First and foremost, leave and absence management is about meeting regulations and ensuring you have appropriate staffing to deliver results. But a flexible solution that's configured to your needs can help you manage leaves and absences in a way that positively impacts results.

A robust leave and absence management solution helps you streamline manual processes and empowers employees to manage their time off. It allows managers to maintain productive operations, even when team members are absent, and identify if absenteeism is becoming a problem. Finally, effective leave management provides HR teams with the data they need to address issues and make business decisions.

Find a solution that empowers people to work better while they're at work and streamlines the process—for you and for them—when they need time off. With the right solution, you can manage your employees more effectively, increase their satisfaction and meet organizational needs.

Reach out today to learn more and [schedule a demo](#) with one of our consultants.



Chapter

4

DOCUMENT MANAGEMENT

# Secure Your Employee Files with a Document Management Solution



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Many smaller businesses are still storing hard copies of extremely sensitive employee documents. Others may store digital files in a third-party system or, worse, on an individual employee's computer. These standard document management solutions are neither secure, nor are they generally well organized. Not having an electronic document management solution can lead to costly errors uncovered during an audit or legal action.

## Consider this...

You're the proud owner of a growing business.

One afternoon as you're leaving the office, your assistant informs you that Donald, an auditor from the Department of Labor, is arriving in two days to follow-up about an FMLA complaint.

In normal times, this announcement might not cause you concern. But these aren't normal times.

The first issue: your HR manager just left the organization. The second issue: all FMLA files were apparently saved on her computer. The third issue: her file organization leaves something to be desired. So far, you've only found photos from what appears to be her nephew's high school graduation from Franklin Marshall High School in Louisiana. (Otherwise known as file name: FMLA.)

To say you're dreading your meeting with Donald from the DOL is an understatement.

This situation offers the perfect illustration of how a business can benefit from a document management solution that allows people in the organization to upload and store employee-related documents. Whether it's performance reviews, direct deposit information, I-9's, FMLA records or other important employee records, storing them in a central, secure location is essential.

Without a document management system, it's easy for managers to become overwhelmed by keeping track of employee-related documents and paperwork. That's when documentation is lost or hard to find, which creates serious issues if audits occur. When a documentation process and system are in place, organizations save time, money and stress.





# The Importance of Document Management

There are several risks for HR and Payroll departments if the organization doesn't maintain employee-related files in a secure location that provides easily accessible digital files.

In terms of operations, there are issues related to **space and document retention** when organizations use paper files or disorganized digital methods to store employee-related files. Whether it's the space for multiple filing cabinets, offsite storage, or maxed out hard drives, copies of employee files consume a lot of space. These file storage issues only grow as your business expands, and the number of current and former employee files increases.

In terms of **data security**, if you're using paper documents or unencrypted files, you're at risk of a confidential data breach. Employee-related documents contain highly sensitive information, including bank accounts, social security numbers and performance management details.

Some organizations opt to store employee documents in a third-party system offsite. While this may solve the security issues, it has negative impacts on syncing systems and having immediate access to records in the same system where your workforce management tools and processes already exist.



## Easy access to documents during an audit

While having integrated document management is key for smooth operations and record retention, having documents readily available in the event of an audit is essential to avoid stress, legal issues and costly fines. An audit can happen at any time, and companies are expected to have certain documents organized and readily available for all employees.

Federal agencies typically don't provide much advance notice of an audit; the amount of time an employer must gather documentation depends on the auditor. For an organization without a document management system in place, an auditor's arrival creates stress and panic as teams scramble to locate required records, data and forms. Three common employee-related audits that organizations encounter include:

- **FMLA audit:** The Department of Labor (DOL) can audit employers at any time; often, the reason for an audit is due to an employee complaint. The DOL's Wage and Hour Division has consistently [received more than 1,000 Family Medical Leave Act \(FMLA\) complaints per year](#) for decades. As part of the audit, the DOL will review the FMLA process step-by-step and request to see all relevant forms and documentation.
- **I-9 audit:** The Department of Homeland Security conducts these audits to confirm employees' eligibility to work in the United States. As part of this process, hiring practices are reviewed, and verification is required for all employees. If Forms I-9 are incomplete or missing, employers can be [fined between \\$100 and \\$1,000 for each failure](#).

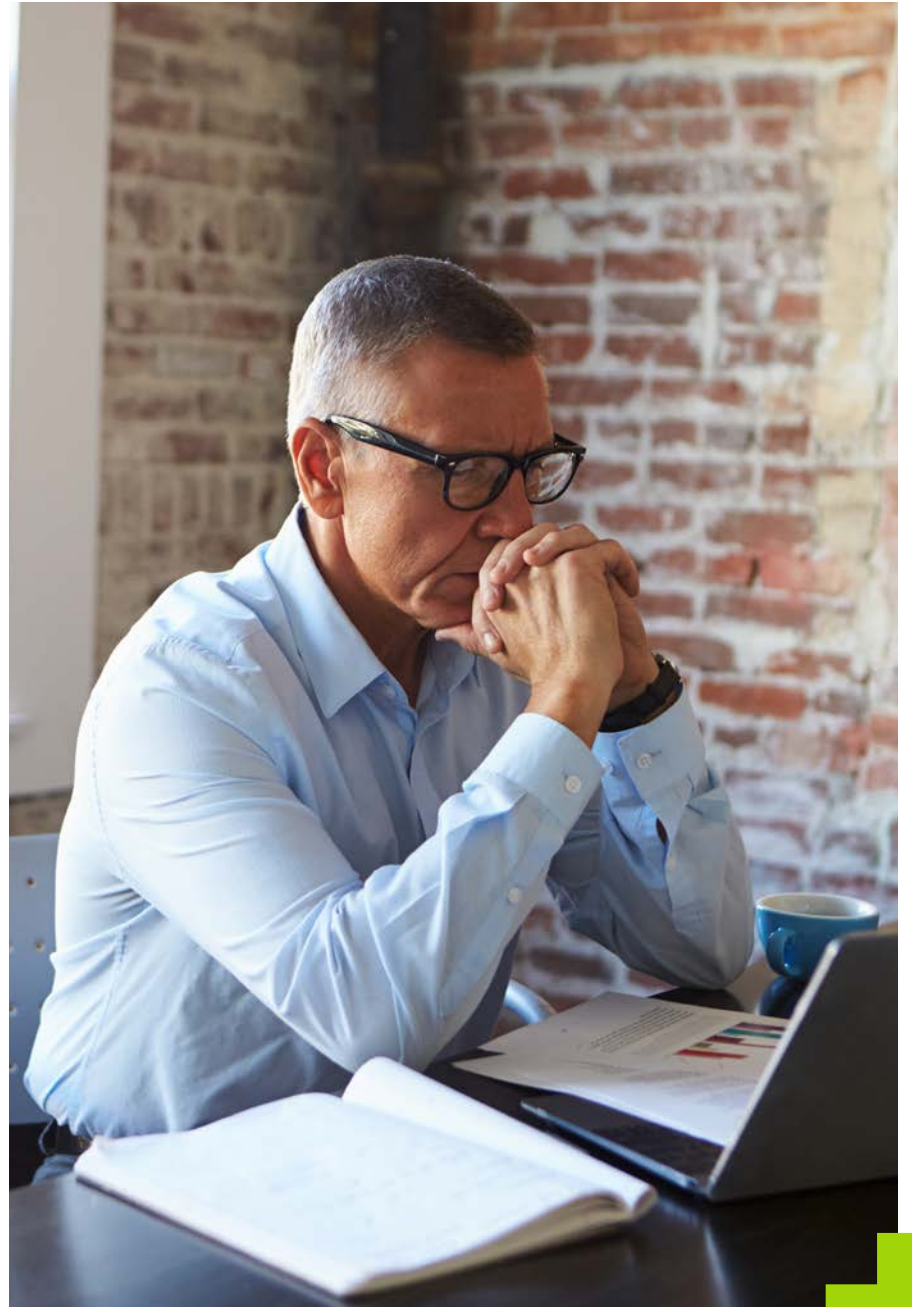
- **Wage and hour audit:** The focus of these investigations by the DOL is anything related to pay and covered by the Fair Labor Standards Act (FLSA). For example, they may be auditing overtime pay compliance, exempt vs. nonexempt classification or minimum wage compliance. In addition to interviewing employees, the DOL will request records and documents for their review. The [maximum penalty](#) for violations of the FLSA's minimum wage and overtime provisions is \$2,014, assessed on a per-employee basis.

In addition to investigating based on employee complaints, [SHRM reports](#) that the DOL "has also targeted employers in low-wage industries for wage and hour violations, particularly in the areas of agriculture, daycare, food service, garment manufacturing, guard services, healthcare, hotels and motels, janitorial services and temporary help."

Storage space, record retention, security and audits are all impacted when organizations don't have an integrated document management system in place for their employee-related files. Be sure you're [keeping the files you need](#) and that you're storing them according to legal guidelines. Before the costs and time spent on these issues quickly spiral out of control, HR leaders must examine how an integrated platform can help protect their organization.

# The Benefits of Integrated Document Management

From a practical standpoint, many organizations have already found that moving to electronic employee file management is beneficial. A system can be maintained effectively and efficiently when a plan is in place for implementation, monitoring and retention. Accessibility, data security and consolidation are three of the primary benefits of integrating document management with your workforce management solutions.



# 1

## Accessibility

Rather than sifting through a stack of file folders, when documents are stored electronically, you can use categories and tags for easy sorting within the system. Attaching these to each employee profile makes it easy to locate any file you need quickly. If you experience an FMLA audit, for example, you could pull all records related to FMLA. This type of access makes an internal or external audit much more efficient and less stressful.



# 2

## Data security

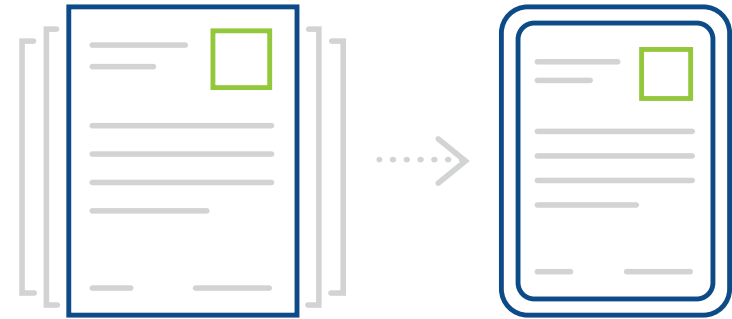
Even if an employee has the administrative rights to access sensitive information, that doesn't mean they need access to all data. For example, Payroll employees don't need access to employee performance reviews. Managers don't need access to direct deposit info or W-4 info. With a secure, organized solution, you can control access to documents by role or other factors.



# 3

## Consolidation

When employee document management is part of your workforce management platform, you don't have to bother with switching systems or pushing data sync before accessing a file. The most current information you need exists within the same system. Management can access documents directly within their workforce management solution, making the data readily accessible for all departments.



Maintaining documents within the existing workforce management solution saves money by consolidating systems and minimizes time wasted on administrative work. As part of a cloud-based solution, your HR and Payroll teams will also have access to necessary files regardless of their location.

In addition to the benefits of digital document management, there are important legal considerations to keep in mind. As with any new technology, organizations should consult with legal counsel regarding any requirements.

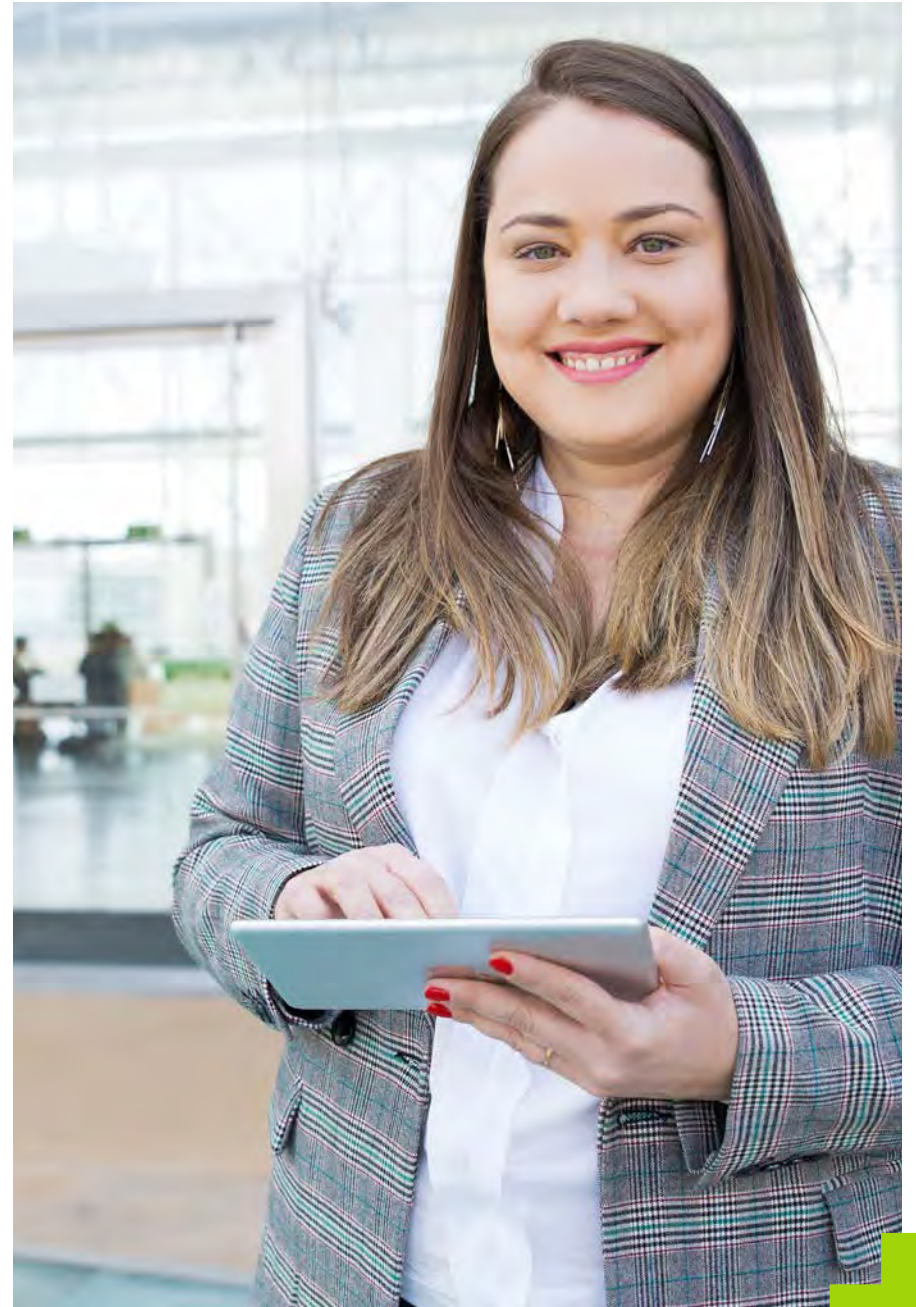
There are a variety of document management options in the marketplace. As you consider adding this beneficial tool to your workforce management processes, it's crucial to work with a provider that understands your business and offers a tool that meets your needs.

# A Vital Addition to the Workforce Management Toolbox

As part of our experience delivering industry-leading workforce management solutions and payroll integrations for clients, we witnessed first-hand the struggle companies face when they don't have an efficient document management system for their employee records. Our customer service team received many calls from clients who faced audits but didn't have easily accessible digital copies of their most essential employee records.

We're committed to providing clients with the tools they need to be successful, which is why our growing workforce management portfolio now features [streamlined, secure document storage](#) that benefits your entire organization.

TCP allows you to store and manage documents in a way that's designed for the sensitive nature of confidential HR-related documents. Our approach is built on customizable categories, streamlined FMLA uploads and extensive permission configurations.



## Customizable categories

Customizable categories can be as specific or generic as an organization deems necessary. It's possible to configure it to simple categories such as HR or Payroll, or you can make it more complex based on your needs. For example, you might choose to establish categories by document type, such as performance reviews, audits or leave requests. Everything is customizable, so you don't have to worry about modifying your processes and policies to meet the system's requirements.



## Streamlined FMLA uploads

Streamlined FMLA uploads enable organizations to upload all necessary FMLA files to both the employee profile and FMLA cases. With three to ten documents required per FMLA request, this can save considerable time. Uploading directly onto the employee's profile allows you to store and track employee-specific documentation where that employee's information already exists. Uploading to an FMLA case ensures that all the necessary materials for an FMLA case are located in one place. This is useful for auditing purposes and ensuring that all the required documentation is successfully filled out and tracked. Regardless of the need, with streamlined uploads FMLA information is easy to find and accessible in both locations. If you experience an audit, this easy access will be of great importance to locate files that may help you avoid fines.

Streamlined FMLA uploads ensure all the necessary files for an FMLA case are located in one place.



## Extensive user permissions

Extensive user permissions allow organizations to configure a hierarchy when it comes to managing employee documents. You can restrict permissions so managers may only view document categories relevant to them, and you can even grant access regarding viewing, uploading, downloading or deleting documents. This ensures that document integrity is secure. Additionally, TCP's solution offers SOC-2 compliance to ensure the data is secure and encrypted.

An integrated workforce management solution can offer standardized, centralized document management and storage capabilities that make it easy to find what you need when you need it. Adding document management capabilities to your existing workforce management platform provides an even more powerful and holistic solution for your organization.



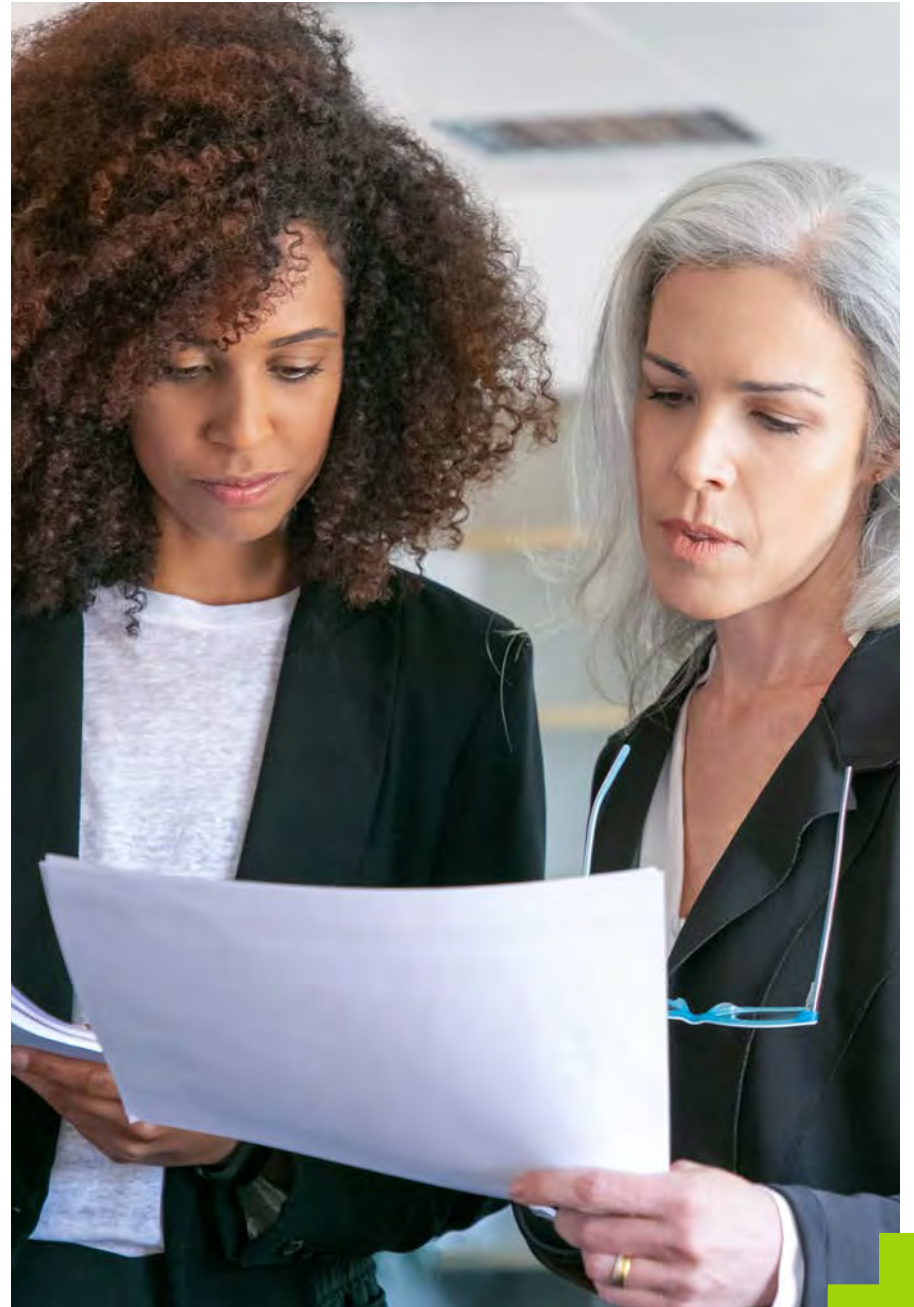


# Removing the Document Management Dilemma

Instead of drama and dilemmas related to employee documents, organizations can save time, money and stress with the right platform in place. TCP believes that Document Management is a crucial part of workforce management. It's the third pillar in our robust platform, which includes Scheduling, Absence/Leave Management, Document Management, Labor Tracking/Costing, and Mobile.

Document Management is a new feature in TCP's TimeClock Plus platform explicitly designed to help organizations store sensitive data while also making it easy to locate and track employee-related documents in the system.

During this era of extensive workforce change, HR needs to switch to digital employee files. As a function, HR is charged with managing the most documents in an organization and protecting a high volume of sensitive information. But merely uploading documents is just one part of the equation. How HR works with files once they're digital determines whether going paperless translates to productivity gains. This type of solution reduces the administrative burden and allows HR to be more flexible and agile in meeting business needs. Your employees trust you keep their sensitive data safe. Is your organization doing enough to protect this information?



Chapter

5

LABOR TRACKING & JOB COSTING

# Gain Valuable Workforce Insight with Labor Tracking and Job Costing



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A solid workforce management (WFM) strategy starts with a clear picture of the time and work required to complete tasks across your business. From that foundation, companies use workforce management to create forecasts, schedule employees and measure employee and job performance.

If you're running into issues such as job cost overages, inaccurate bids that end up costing you money or lagging employee productivity, basic time and attendance won't help you address those issues. Instead, you need a level of workforce management detail that provides valuable insight about your business and your workforce.

Empowered by workforce management tools, organizations are positioned to optimize and increase performance across human resource management, scheduling, budgeting and forecasting.

Your organization needs the data and insights that will empower you to take your labor tracking capabilities to the next level. There are two essential workforce management tools that will help you do this: labor tracking and job costing.

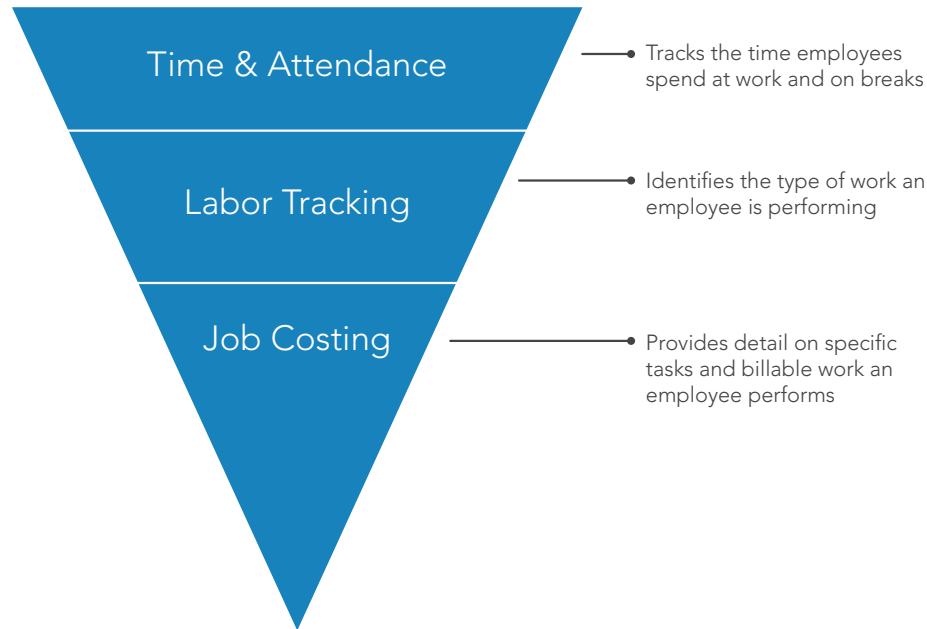
**Labor tracking** is how your organization tracks and understands your labor costs. It's how you pay employees for their time – based on the labor of the job they performed. Accurate labor tracking is essential for accurate budgeting and job costing.

**Job costing** is a way of using codes to track the costs of a job. This data reflects what the labor costs to get a job done. With job costing in real time, you can see whether your project is on track and on budget.



# What level of employee time tracking is right for you?

Using these two tools, HR and Finance can shine the light on labor budgets and workforce management.



Instead of calculating the profitability of the entire business, labor tracking and job costing allow business owners to manage their workforce based on the cost-related metrics related to specific products, services and processes. It's an effective strategy to assess the profitability of different elements of the company, including how labor is impacting the bottom line.

“At most companies, [the workforce] is the biggest expense the company faces,” Brian Kropp, human resource practice leader for CEB told the [Society for Human Resource Management \(SHRM\)](#).

The impact of labor costs makes it essential for an organization to understand if they're using the appropriate workforce model, if they're maintaining budgets, and how they might be able to improve their operations.

Thanks to technology, labor tracking and job costing now exist within workforce management platforms. With software, organizations are now empowered to efficiently track their employees' labor hours, gain greater insight into how the workforce uses their time and provide essential data on the status and costing of projects.





# Maximize Cost Efficiency by Tracking Labor Hours

Given the various types of work that happen in an organization, it's essential that companies have a way to efficiently organize and oversee labor hours. Workforce management software allows you to do just that. With the right software not only can you track the hours employees work, but you can also define and configure the types of labor that occur in your organization.

"Once your company starts to grow, it's going to be impossible to personally track your employee's work," according to Dave Nevogt in [Forbes](#). "Instead, use a tool that can help you...knowing that you're tracking work each day gives you peace of mind and allows you to focus on actually growing the company."

If an organization wants to run a cost-effective operation, at a minimum, HR teams need to lead the way in tracking and measuring workforce hours. This not only allows you to accurately pay your employees, but it allows you to determine how long it takes them to accomplish the necessary tasks to run your business.

This is the data that allows your organization to maximize productivity, efficiency and profitability. You're not asking people to work harder. Instead, using the data and insights gained through your workforce management tools, you're enabling your entire organization to work smarter. You've captured and analyzed the information needed to be able to make wise, data-driven decisions when it comes to workforce management.

"Instead, use a tool that can help you... knowing that you're tracking work each day gives you peace of mind and allows you to focus on actually growing the company."

— Dave Nevogt  
Forbes



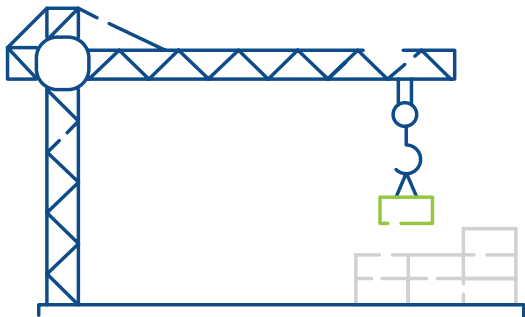
# Insights you can gain by tracking labor

By tracking labor, employers attain insights into what their workforce is doing. They're able to understand what qualifies as billable production time and gain awareness as to how their workforce uses time to get the work done.

For example, a mechanic who works in an auto shop will clock in and out for their shift. The employer uses that data to:

- Gather insight into the work that's happening
- Pay employees accurately for specific roles
- Make business decisions based on the division of labor for the organization

Having accurate labor tracking also helps employers uncover any issues, irregularities and root causes. They have insight into exactly what jobs and tasks are requiring time. Accurate labor tracking increases efficiency for an organization by associating an employee's time with their specific labor.



## Consider this...

A student worker at a university is employed by both the transit and food service departments.

The student typically works a total of 20 hours a week; however, their hours fluctuate. Some weeks they have 20 hours of food service shifts while others they work 10 hours in food service and 10 hours in transit. In addition, the pay rate for these two jobs is not the same.

In the above example, it's easy to see that without a system, this student's labor would be difficult to track in an efficient and accurate manner. However, by allowing you to define and configure types of labor, a strong labor tracking system saves time and energy for payroll as well as ensuring a higher degree of accuracy, leading to a happy and fairly compensated employee.

The organization can track each type of labor individually (transit job or food service job) and export that data directly to payroll, so the student can receive the accurate pay for the hours worked in each job. In addition, managers in these two departments can ensure the student's hours don't exceed the total hours students are allowed to work on campus.

# Gain Insights With Job Costing

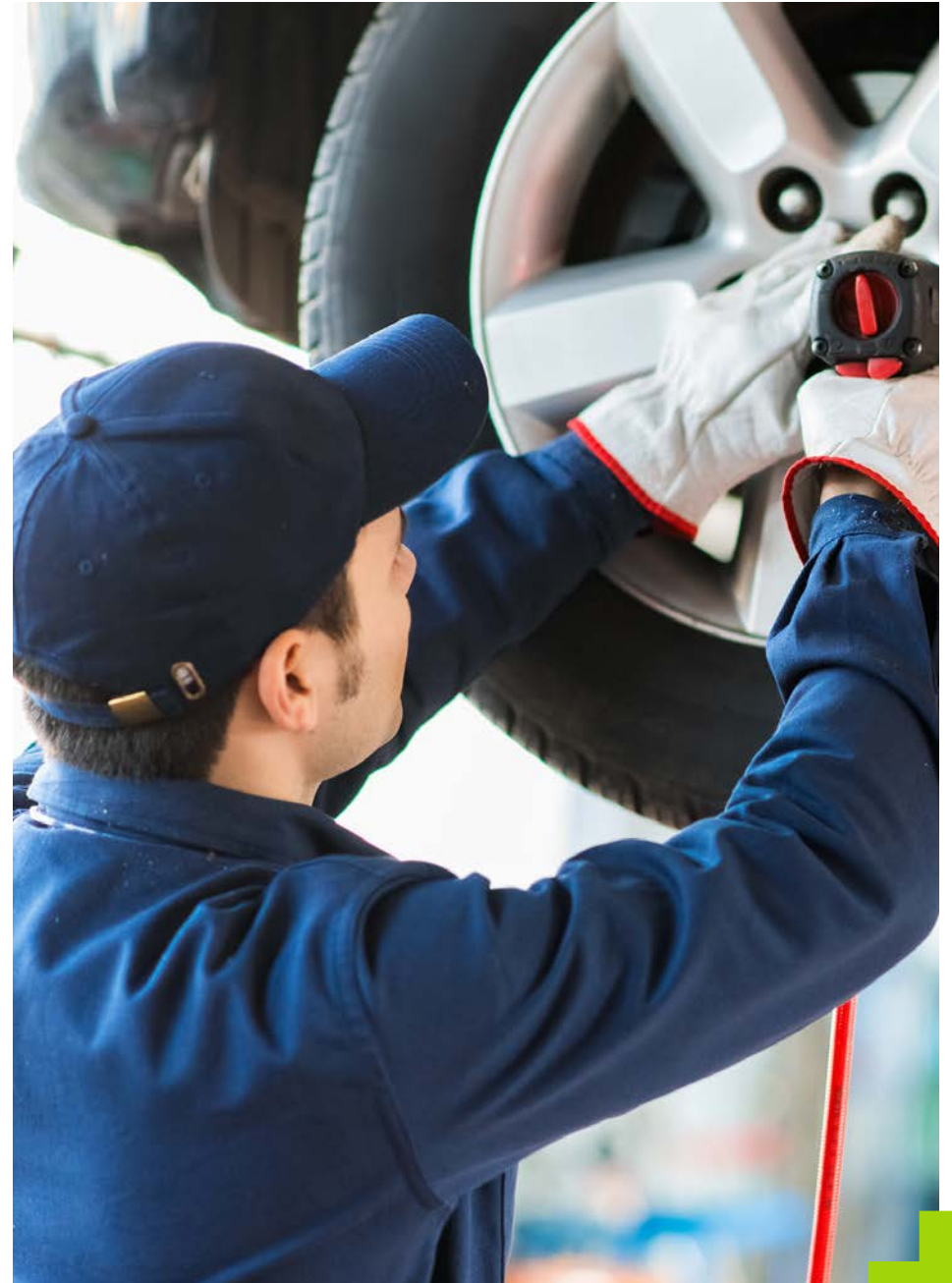
Labor tracking is just the beginning. When you also have job costing data as part of your workforce management solution, you can capture additional valuable insights that can have a huge impact on your business.

For example, when a mechanic clocks in for the day as an hourly employee, they are also presented cost codes that deliver more detail about their labor. As employees select cost codes identifying specific jobs, you'll not only have the time they worked, but you'll also know what they were working on.

If the mechanic finishes the oil change in an hour, they will move to the next task. At that point they select the cost code for their next project – for example, spark plug replacement. After working on that job, they clock out for a break using the time clock device.

By examining the data from labor tracking and job costing, you can answer questions such as:

- Are we using our workforce efficiently?
- Is our labor spend over or under budget?
- Are we spending time on the most profitable jobs?
- How much time are we spending on billable work?



Job costing data provides numerous benefits for organizations to help ensure you're using labor efficiently and maximizing your results. While job costing has historically been used in manufacturing or service industries, it has applicable use across industries.

Our clients use job costing to:

#### **Inform their employees which projects they will be working on.**

You can set up job costing so that employees choose their task from a list, or you can assign it to them through the system. For example, a construction company can use job costing to tell their crew which site to work at each day, as well as what type of work they'll be doing – framing, roofing, or window installation. This ensures their time gets charged to the correct project each day.

#### **Evaluate the overall amount of time spent on specific tasks.**

Cost codes can be applied across employees and departments so that organizations have a full view of all hours worked against specific tasks. For example, manufacturers could use cost codes to determine the productivity of each station or machine on the floor.

#### **Analyze data to understand project status.**

When you're tracking labor against cost codes, you have a real-time view on project status. For example, in manufacturing, the company can get information about units made for a project, steps completed, or parts used – all based on cost code data. This data is another way for organizations to evaluate overall production and project status.

#### **Track activities to specific projects and grants.**

Many public universities and school districts receive funding based on grants. Part of the requirement to receive the funding is tracking and submitting information about how the money is applied. To effectively allocate funding from these sources, you must carefully track the time employees spend on a range of student support activities and tie those activities back to your overall budget. When you have a reliable time-tracking solution, you can track hours, assign them to the right budget codes, and have a real-time view of how your payroll costs compare to your budget for specific activities.

#### **Capture billable time by client project.**

Job costing can be used to configure work assignments so that employees can track and bill time to a client's project. This is applicable for organizations such as law firms, marketing agencies and architecture groups. In each of these cases, organizations set up time clocks and job costing to track billable time based on their unique billing requirements.





# Analyze Labor & Job Costing Data For Business Impact

Labor and job inefficiencies can add up quickly and have a negative impact on your bottom line. [Small Business Trends](#) reports that only 40 percent of small businesses are profitable, 30 percent break even, while another 30 percent continually lose money.

You're not in business to break even or worse, lose money. So, think about what it might take to change the game. The labor tracking and job costing functions in workforce management software can help company leaders identify and examine workforce issues. Then they can use the data to determine changes that need to be made based on jobs and tasks within the organization.

"While workforce management started out as a method for scheduling, it's since grown into a multi-faceted management framework that helps organizations easily track employee productivity," [according to CIO](#). "As more employees have the ability to work remotely and mobile technology becomes the norm, companies are starting to embrace mobile workforce management of off-premise employees."



Indeed, workforce management has evolved into a framework that helps businesses improve time management, forecast workloads and offer insights into the workforce. In addition to solving current issues, having access to data related to jobs and labor allows you to forecast for the future and help your organization make more informed decisions.

Using the data from your workforce management platform, you can make decisions based on:

- Total hours worked and dollars spent by a project, department or business unit.
- Future scheduled hours that will forecast total labor spend for any department, job, step, operation or task in the system.
- Real-time over/under budget status based on hours worked and tasks completed.
- Reports such as an actual vs. scheduled vs. budgeted can be used to analyze and compare factors and functions within your business.

Labor tracking and job costing can also help which jobs and tasks are most profitable and who is working on them. Fortified with this information, HR teams and managers can implement workforce policies that support productivity and profitability. It also helps organizations understand the ideal labor mix required for given tasks. Based on data, you can ensure top performers are assigned to the most profitable jobs to increase efficiency and limit unnecessary costs.

Workforce management has evolved into a framework that helps businesses improve time management, forecast workloads and offer insights into the workforce.



# Advance Beyond Time & Attendance

Workforce management is an organizational process that includes all the activities required to maintain a productive workforce. It includes time and attendance, but it goes far beyond that. Workforce management supports the management of mobile and remote employees. It streamlines scheduling and the management of employee leaves.

Finally, workforce management enhances your ability to track the labor and job costs associated with your workforce so you can make business decisions. Configurable labor tracking and job costing allows you to assess the when, what and how of your employees' performance are essential to optimize your workforce.

TCP has experienced the growth of the workforce management industry firsthand. We began in 1988 to help the restaurant industry solve time and attendance challenges. Since then, we've grown into a comprehensive workforce management system that helps thousands of organizations optimize operations and streamline processes.

Like all the components in our workforce management solution, we provide labor tracking and job costing tools that are built so clients can make the best use of their tech stack. While other providers may force clients to fit into a box, our solutions are highly configurable. In TCP's platform, cost

codes are configurable to include the entire organization or an individual department. You can define up to five different levels of work per cost code. For example, these levels can be related to the specifics of a particular job, or you can use a level to designate specific work orders.

In addition, through labor tracking and job costing, we help organizations simplify labor calculations with automated payroll. Using shift differential in our TimeClock Plus software, users can create and assign shift schedules that modify employee rates of pay. These shift schedules can be assigned to employees and will, when processed, modify the rate of pay the employee receives. Rather than just calculating the amount of time worked, organizations benefit from automated tracking of all the different types of work employees do. This ensures employees get paid at the proper rate, based on the job they were performing at that time. It also helps organizations maintain accurate records of overall labor and job costs.



## LABOR TRACKING & JOB COSTING IN ACTION:

# How TCP Software Improves Time Tracking for Title 1 Activities



For our clients working in the field of education, automated time tracking takes the pain out of budgeting and recording the time spent on Title 1 activities.

[TCP's solution for K-12 schools](#) helps learning institutions streamline the process of assigning employee time to the correct budget and make sure they're using the funds as planned. Here's how:

- **Time-saving automation:**  
Employees can submit their hours in just a few clicks. Integration with payroll platforms makes for seamless delivery of supplemental pay based on approved work hours.
- **Real-time budget management:**  
Administrators can view hours dedicated to any supplemental-pay activity as they are submitted, approved and tracked against budget.
- **Track employee time for a broad range of activities:**  
Calendar tools help track employee hours spent on teaching, Title 1 activities and other types of supplemental pay.

- **Dashboards and reporting:**  
Our [cloud-based dashboard](#) makes it easy to manage employee hours and attendance from a single, user-friendly portal and run reports to see trends over time.
- **Anywhere mobile tools:**  
The [MobileClock app](#) allows teachers to record their time from any location.

These features are proof that we're dedicated to solutions that adapt to the needs of your business, rather than requiring clients to use a standard format. Our broad range of capabilities, including these labor tracking and job costing tools, are designed to work together so your teams can work better.



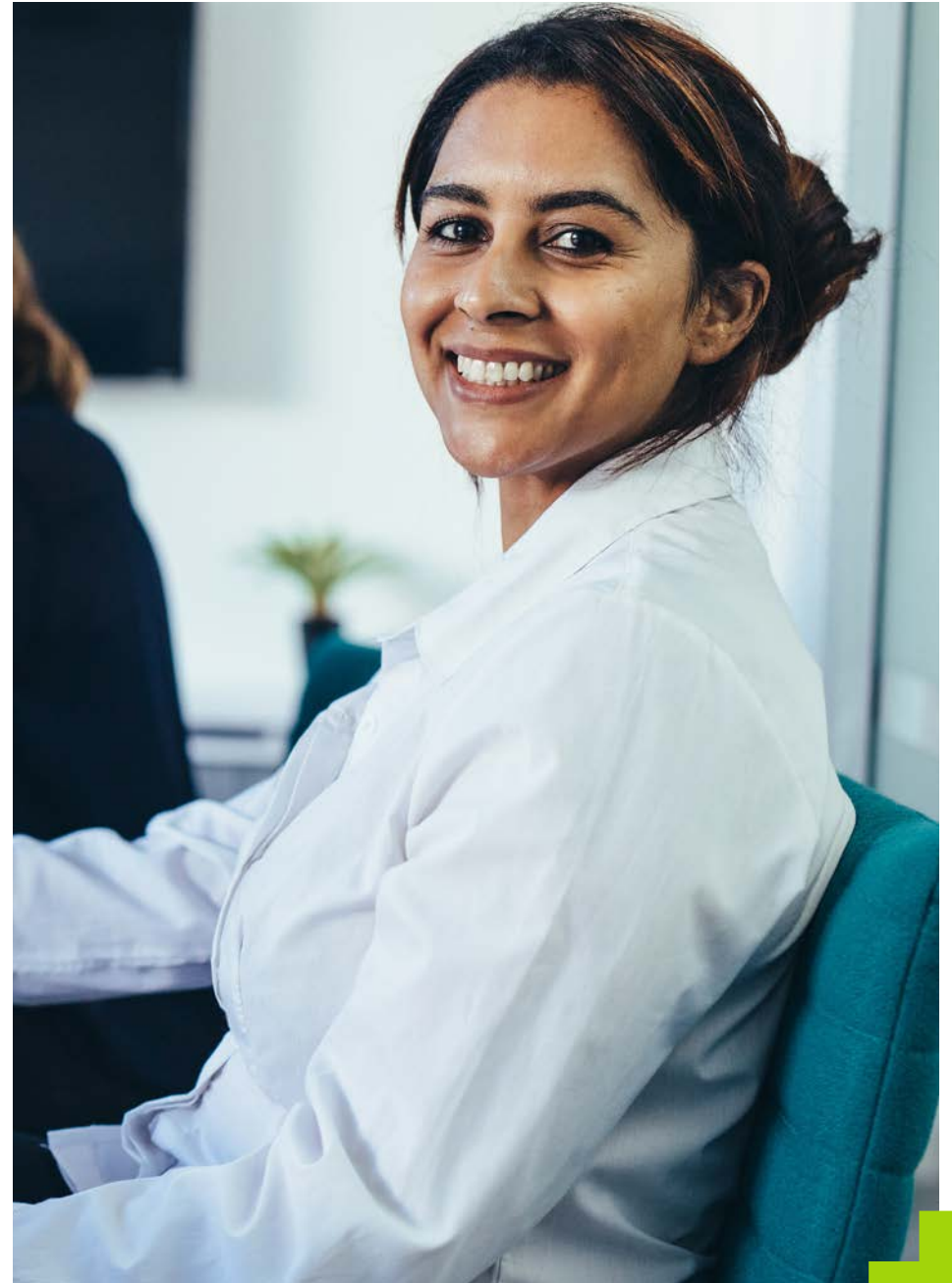
# Conclusion

In the past, the idea of labor tracking and job costing may have been assigned to Operations or Finance. However, the time has come for HR and Payroll to take an active role in the discussions about labor tracking and job costing. As the function that manages “all things people,” HR benefits when they have access to the data regarding labor and associated job costs. This valuable information brings direction and focus impact to the organization’s long-term workforce management approach.

Precise tracking of labor and job costing allows your workforce management to be comprehensive and actionable. A flexible solution for creating, assigning and customizing cost codes helps you prioritize precise labor and job tracking so you can optimize your workforce management operations. Equipped with labor tracking and job costing tools, organizational leaders can ensure they’re monitoring every aspect of a job as well as the labor required to get it done.

With a highly configurable workforce management solution, labor tracking and job costing provide you with the actionable data you need to make more informed business decisions. This level of data allows you to move far beyond what you can do based on the basic insights available from time and attendance. Workforce management is more than just a software tool – it is an entire business-process solution.

[Contact us](#) today to learn more about how we can customize a workforce management solution that will help you take your business to the next level.



Chapter

6

MOBILE SOLUTIONS

# Mobile Solutions Are Essential for Today's Workforce



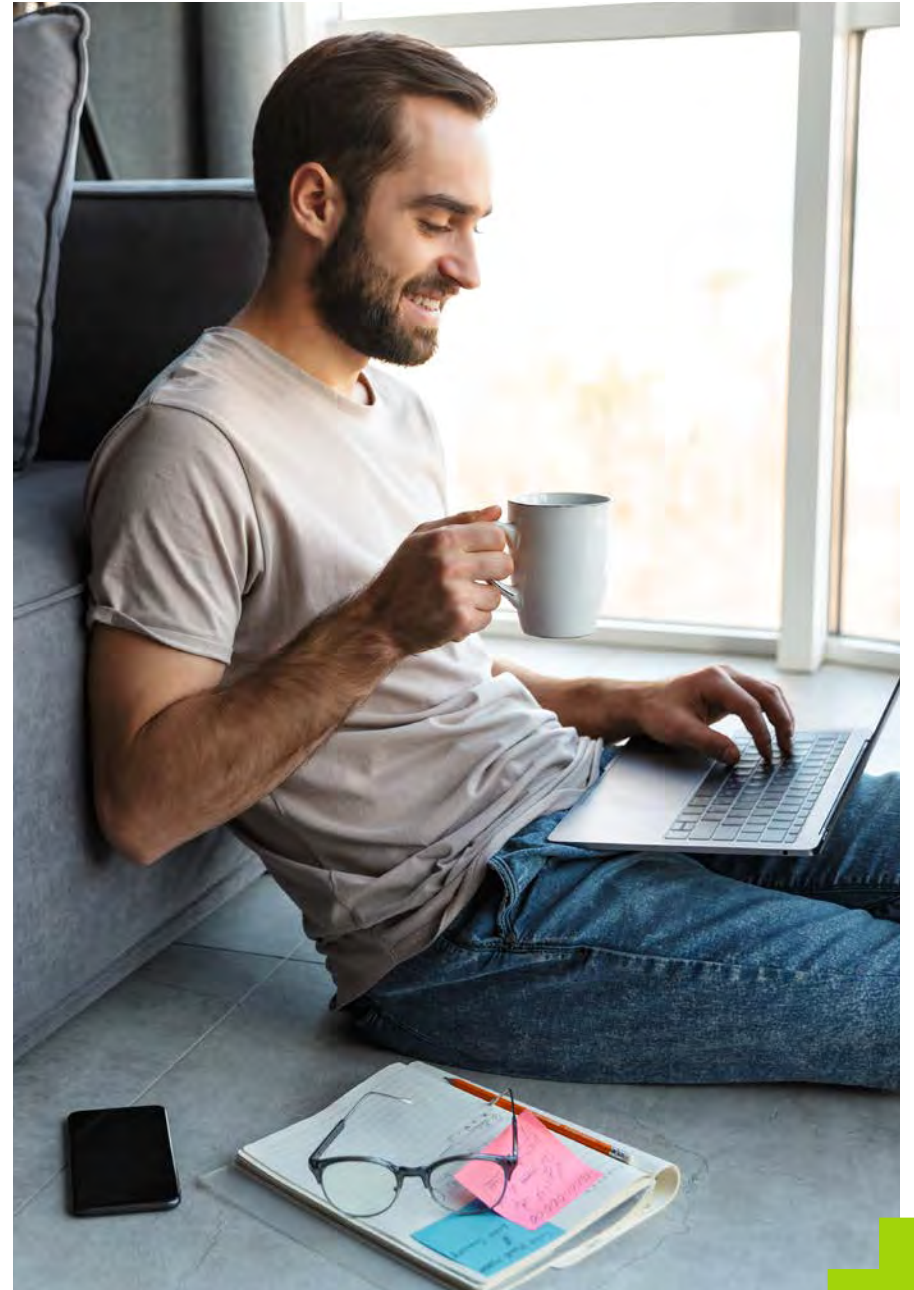
The idea of a mobile workforce may seem fairly new, but it's not. It began with a NASA engineer. In 1973, Jack Nilles worked [on a complex NASA communication project remotely](#), and the concept of "telecommuting" was born. Since that time, organizations have slowly accepted the idea that employees don't have to be in an office to get their work done.

Small and large businesses are focused on empowering every employee to use technology that fits their needs and adds value to the bottom line.

"Businesses operate in a very complex global world today that requires them and their employees to work everywhere," [Brynne Kennedy, CEO of Topia, told HR Technologist](#).

"More than 60% of the workforce will be millennials and Gen Z by 2020, and they have vastly different working styles than other generations. For example, they prefer to work in and out of full-time employment and often want flexibility between remote locations and being in the office. Managing a mobile workforce involves supporting administrative processes and employee experiences across many locations, policies, and types of locations."

Today, the modern workforce uses mobile solutions on a daily basis, and thanks to the proliferation of the cloud, most employees are now able to access necessary work information anywhere easily when they need it. They can also join meetings via the internet and email colleagues regardless of their location. Mobile technology has changed the game even more by providing most employees with access to digital information and records easily obtained through a device that fits in their back pocket.





## What does mobile mean for workforce management solutions?

Mobile is all about accessibility and ease of use. Through mobile solutions, companies can deploy workforce management to employees who may not work in an office setting – for example, construction, maintenance, transportation workers and hourly employees who are working remotely. For these employees, workforce management software is accessed via a mobile device to provide them with access to time clocks, schedules, manager communications, and company notifications, among other things.

Some companies allow employees to access the full breadth of workforce management capabilities, and other employers just use the mobile interface for time clock purposes. Company policies and needs will inform what level of access each organization needs to offer employees at any given time.





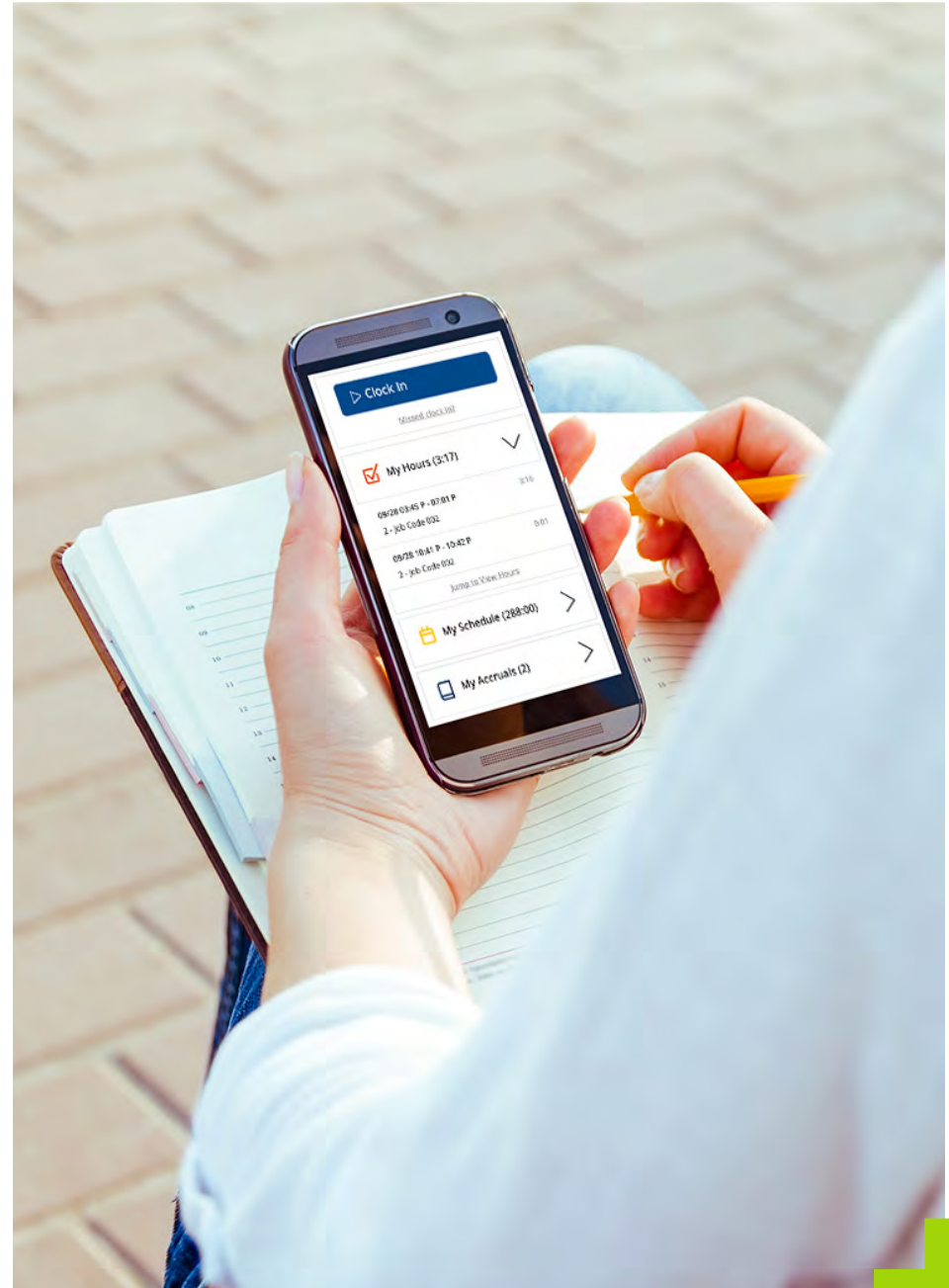
# Top Mobile Functionalities & Requirements

Not all mobile workforce management solutions are created equal. Unlike the fitness app, if it doesn't meet your needs, it's not as simple as downloading another app from the store. It takes careful review to ensure a mobile solution is right for your workforce management strategy. For organizations considering mobile options, you need a clear vision of functionalities and benefits they can achieve when deploying technology for mobile workforce management.

TCP believes there are five key functionalities that a mobile solution should include.

- **Configurability**

You need a mobile solution that can be deployed to your level of comfort. A one-size-fits-all solution forces your organization to adapt to its limitations instead of the other way around. Managers should feel confident and comfortable about the level of access and self-service that employees have via their mobile devices. You should be able to provide employees access to simple functions such as the ability to clock in and out—to more extensive self-service options such as requesting time off or reviewing schedules. As always, access levels and permissions should be based on your comfort level and needs.



- **Offline access**

If you're considering mobile access, that means your employees work from various locations – including those which may have spotty internet access. But we know that even if they can't clock in, employees may be working. In those cases, you need a mobile solution that is not just available in an employee's pocket but is also available offline to allow employees to use the system, even when internet service is not available.

- **Communication tools**

Managers may struggle with reaching employees at remote sites. Your mobile workforce management solution should allow you to push messages to employees working in the field. This functionality is essential for sending schedule changes and communicating the same message to a dispersed group of employees. A side benefit is that you also have a document trail of all communications sent through official channels.

- **Individual devices**

Whether it's via a mobile device or a desktop application, a digital solution allows your employees to clock in without long lines at a time clock. When considering pandemic precautions, this also reduces the chance of big groups of employees using common surfaces.

- **Geofencing**

This location functionality allows you to map areas where mobile operations are permitted. For example, geofencing helps ensure that employees will not perform clock operations from home, on the road to work – or elsewhere.



# Industry Use Cases for Mobile Solutions

Globally, more than 5 billion people own a mobile device, according to [Pew Research Center](#). More than half of those devices are smartphones. To maximize the benefits of today's technology and the efficiencies of a mobile workforce, organizations must adopt a mobile mindset.

"Any technology deployed for workers outside an office should be accessible so that efficiency improves," [according to HR Technologist](#). "Organizations must keep in mind that their employees now have access to better technology outside work than they do at work. They expect any technology they use – for work or personal use – to be intuitive and engaging. To keep them engaged and efficient, a mobile-first mindset is critical."

The mobile workforce is most common in industries such as manufacturing, construction, retail and healthcare, where "deskless" workers are out in the field and not in an office. As an example of mobile workforce management efficiencies, consider how mobile makes it easier for employers and employees in these industries.

- **Construction**

Workers can start their day at any job site without needing a physical time clock to do so. That means construction companies don't need to install or service time clocks at multiple sites. Managers can deploy teams to various places without worries about someone not being able to clock in at a given location. This flexibility allows companies to employ automated solutions without a physical time clock.

- **Transportation**

Drivers can clock in when they start a shift, clock out for breaks, and receive urgent, official communication regardless of their location. Especially in times of disaster or emergencies, reaching these workers with information about inclement weather or road conditions helps reduce safety and logistical issues.

- **Maintenance**

Custodians, landscapers, plumbers, electricians and other maintenance employees are constantly on the move during their shift. Mobile options to clock in help them do so from multiple sites to efficiently track their location as well as the hours they've worked each day.

- **Campus jobs**

Colleges and universities employ large numbers of digital natives. For members of this workforce, who often work multiple jobs, it's practical to give them the ability to clock in via a digital time clock on their mobile device.

While these industries typically have more remote workers, it's important to note the increase of remote and mobile work due to the COVID-19 pandemic. At the peak of the U.S. shut down in early April 2020, [62% of employed Americans](#) worked from home. Since then, many organizations have shifted from managing a remote workforce to managing complex hybrid versions of work. These organizations have joined the growing list of employers who need a reliable, convenient way to manage remote and mobile employees.

# Addressing concerns about falsified time

There are significant advantages when employers use mobile software, especially to manage employee time. Supervisors can react immediately if overtime issues arise. Through automation, digital time clocks save time and effort by seamlessly transferring employee's hourly data to payroll. Finally, time clock apps also improve record retention, securely store data in one location and help organizations comply with all regulations and avoid legal issues.

While managers appreciate and understand the benefits of using time clock applications, they may also have concerns about the falsification of time records. They want to know how they can tell if an employee is clocking in from the beach in Hawaii, 15 minutes early as they sit in their car in the parking lot or from the job site as per schedule.

Those are valid concerns. The answers to those concerns are geofencing and geolocation, staggered access and configuration options. Features that will help you limit falsified time records include the ability to:

- **Varied access.** Find a solution that allows you to enable all functions from every location, functions dependant on an employee's job, or block access from a specific location. For example, a user may have access to everything the app offers when they are onsite. From home, they may only be able to view time worked and request time off. If the geolocation is outside a specific area, you should have the option to shut off access altogether.

- **Configure the system.** Workforce management software should enable you to tailor the experience and user permissions based on time, user location, job types, department or other organizational specifics.
- **Limit IP addresses.** While geofencing and geolocation are popular solutions to limiting access, you may also want a system that allows you to limit the locations where employees can use the mobile app.





# TCP's Mobile Solutions

We understand that organizations need a reliable, convenient way to manage both in-person and remote employees. Using TCP's [mobile solutions](#), employees can perform time clock operations, check their schedules, request time off and more, making it easier for remote, hybrid and mobile workforces.

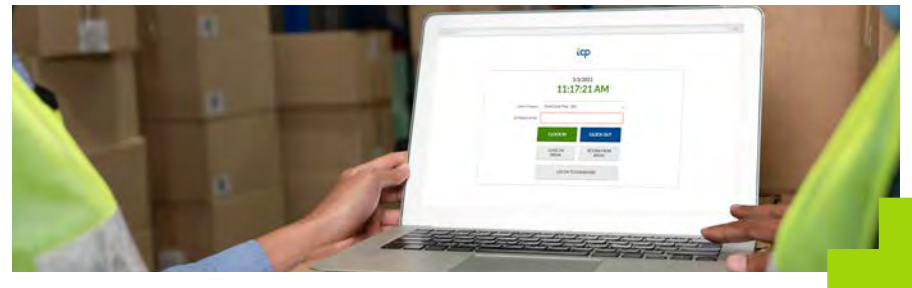
[MobileClock](#) removes the limitations of fixed time-collection devices and gives employees the ability to clock in and out from wherever they may be. Added benefits of our solution include:

- Streamlined delivery of app updates ensure all employees are using the latest version of the app.
- Ability to set different parameters for clocking in and out for salaried vs. hourly employees or remote vs. in-person workers, or prompting employees to complete a health questionnaire before they can proceed to work.
- Options for biometric security protection through a phone's fingerprint scanner to authenticate the employee's identity.
- Setting validation criteria, including using geolocation to ensure that an employee is in the right place at the right time.

TCP's [WebClock](#) is a web-based time clock that allows employees to perform clock operations and self-service actions directly from a computer, tablet or another device.

Through this easy-to-use interface, employees can quickly clock in and out, leave on break, change departments or tasks, submit time-off requests and create timesheets. The customizable dashboard widgets give employees a quick snapshot of their hours worked, messages, time-off accruals, leave requests and more. This software solution is available to employees wherever they are – typically on their personal computers. Some companies use the WebClock instead of regular time clocks, and other companies offer it in addition to time clocks.

Our web and mobile solutions allow employees the flexibility they need to do their jobs and provide organizations with a sense of relief, knowing that their time and attendance data is accurate, secure and accessible.



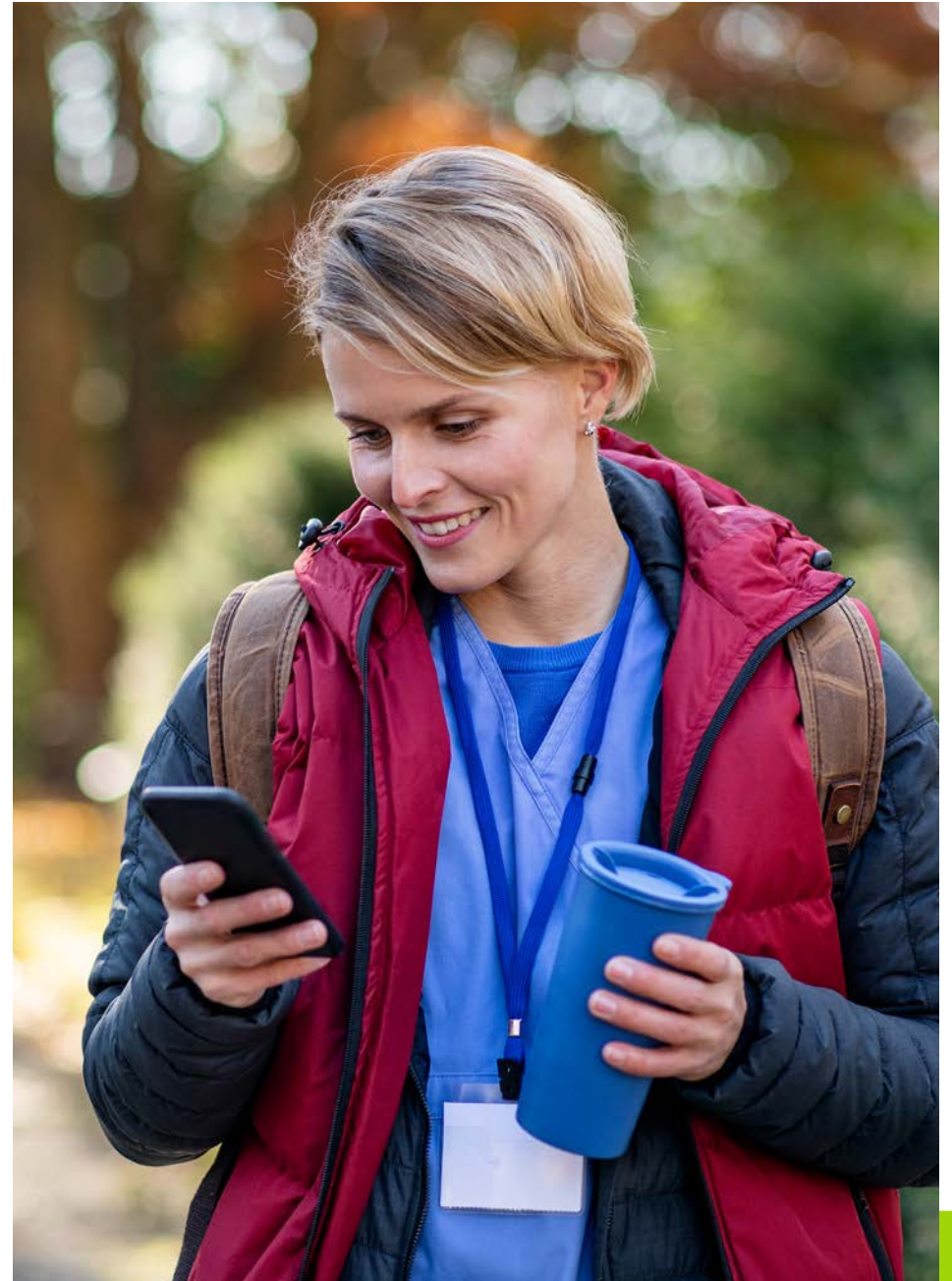
# Maximize the Benefits of Your Mobile Workforce

Mobile workforce needs aren't going away anytime soon. In fact, they're only increasing. The global mobile workforce is expected to [increase to 1.88 billion people in 2023](#), accounting for 43.3% of the overall global workforce.

A mobile workforce is not defined merely by the type of worker. It is also determined by the technology that enables members of this workforce to do their jobs. This is about the data and location mobility that adds to the "anytime, anywhere" landscape of modern work.

Today, mobile workforce management tools enable this agile workplace. When you deploy mobile solutions, time tracking is possible from any location. Communication is enterprise-wide and not limited to people within a single specific job site. With a mobile workforce, information and data are streamlined across systems for greater visibility, productivity and efficiency.

If you're ready to maximize the benefits of a mobile workforce, let's talk. We'll help you understand how you can take advantage of mobile options to deploy the versatile solution that your workforce – and your organization – needs.



# Conclusion

In the past, organizational leaders focused primarily on levers such as supply chain management, production planning systems or enterprise resource planning. But leaders have turned their attention to workforce management – the strategic use and planning for their human resources.

Today, workforce management is a key organizational process that includes all the activities required to maintain a productive workforce. Workforce management involves supervising mobile and remote employees, scheduling employees and administering leave, making business decisions based on labor tracking and job costing, and deploying document management solutions to avoid risk.

Thanks to technology, this long list of workforce management tasks can now be handled through tools and software that support management, front-line supervisors and workers across every industry. Genuine workforce management happens when all the key activities required to maintain a productive workforce integrate seamlessly into one package.

Over the coming years, the idea of what it means to “work” will continue to shift and change dramatically. Organizations can prepare for those shifts by implementing tools and technology to engage and supervise employees. Enabled by effective systems, it’s possible for companies to manage their workforce in a way that empowers everyone to work better.



## Thanks for reading “Everything You Need to Know About Workforce Management.”

Interested in learning more about how TCP's solutions can help you better manage your workforce? **Schedule a consultation today.**