Scheduling, Payroll and Benefit Management System

James R. Polkowski
Executive Director of Business Services and Risk Management
Schoolcraft College, Livonia, Michigan
Abstract

The College-wide systems used for processing payroll and tracking employee benefit time off were multiple manual paper systems that required extensive manual data entry into both the college’s administrative payroll system and spreadsheets and tracking calendars in the Human Resources department. Approximately 900 staff are paid bi-weekly and about 300 staff receive benefit time off that is tracked by bank type: vacation, sick, personal business, and compensation time; also tracked are jury duty, bereavement, and FMLA. The goal was to automate these payroll and benefit processes through a computerized system, to enhance and standardize scheduling systems and to install electronic time clocks for data entry for some employee groups.
Introduction

Schoolcraft College is a comprehensive, open door, community-based college. The college operates two campuses in the western suburbs of Detroit, Michigan. The college 2006 fall enrollment was 11,300 credit students and 4,500 continuing education students. The college employs about 1200 staff (excludes faculty) which includes about 250 student employees at any point in time but up to 400 student employees throughout the year. We also have a large number of on-call staff that work during busy registration periods or on an as-need basis. About 300 staff receive benefit time off (benefits) for vacation, sick and personal business. Compensation time (comp time) is also banked and tracked when an employee works overtime and takes time off in lieu of over-time pay. There are four unions and eight pay classes all with unique contract language rules or benefit attributes. Visit our web site at www.schoolcraftcollege.edu.

Design

A business improvement process was initiated in the Finance and Business Services division to fully computerize the payroll processes. It was determined our administrative computer system (Datatel) could not be easily programmed to accomplish all our goals. A team researched available software to computerize as much of the payroll and benefit tracking processes as possible. Most commercial software in this area was designed for industry. We found few universities or colleges that had implemented the full range of time, attendance and scheduling software standardized across the entire institution including electronic time clock. Software Requests for Proposals, RFP's, were sent out and analyzed. This process took about six months of study. The Enterprise software from InfoTronics Inc., Farmington, Michigan, http://www.infotronics.com/ with limited
license for 50 employees was purchased in December, 2003, from a Michigan dealer, Advanced Time Management, Inc.  http://www.advancedtime.com/ The system was tested in the Food Services department as part of the study with the use of an electronic time clock and the college’s proximity ID badges. After a few months testing the software, a full package for 1,000 active employees was purchased. An unlimited number of terminated employees can reside in the system. The license also includes access to the system for up to 150 supervisors.

How the System Works and Benefits the College

The system consists of three integrated components: Payroll Management, Schedule Management, and Benefits Management. These three components work together to give managers a computerized system that is standardized and consistent across all departments but can also be customized to meet unique department requirements. Departments with larger numbers of staff use the system more intently than departments with only a few staff.

1. Payroll Management

Employee data entry into bi-weekly timesheets are automatically accessable through the use of staff PC’s (personal computers) and 16 time clocks. About 900 employees use the system each pay period and a total of about 1200 employees use the system annually. Proximity ID badges are used at the time clocks by about 400 employees each pay period. The ID badges have dual functionality for both the college security system and the time clocks and help identify an employee to customers and students. Payroll and Human Resources staff process 26 payroll periods a year. The complete
elimination of all paper timesheets was realized in 2007 (about 20,000 timesheets per year). These timesheets were reviewed by Payroll and Human Resources to manually input and track data and to have historical records. All these records will now be stored on the server for immediate retrieval. The bi-weekly timesheets are uploaded to the administrative payroll system in a few hours and have eliminated about two days of manual data entry by two payroll employees.

2. Schedule Management

The management of employee schedules, timesheets and benefit time off is fully integrated and standardized for all departments. The integration improves scheduling and also monitors and documents staffing problems. With multiple supervisors in most departments, many of the monitoring functions can be performed by full-time clerical and classified staff. Managers can also review timesheets at any time during the pay period eliminating the “Monday crunch” of collecting and proofing manual timesheets. Monitoring is done by the “exception method” so managers only need to look at errors, reducing review time. The standardization improves college-wide training and in many departments provides a needed computerized management scheduling system which includes basic and customized reporting and tracking tools.

3. Benefits Management

The management of staff benefit time off (vacation, sick, personal business, comp time, jury duty, and bereavement) has been automated and integrated into the scheduling system and the timesheets. This method completely replaced the manual paper tracking and reporting methods used in the Human Resources department and provided
for “real time” reporting of used and available benefit time for staff and managers. The software has eliminated all need for paper copies of staff “Absence Request Forms” and replaced it with an electronic “Request for Time Off” method. An estimated 10,000 annual forms have been eliminated. Human Resources staff no longer needs to send out annual memos to staff and managers on benefit balance banks or carryover vacation.

**Implementation**

The team consisted of Finance and Business Services directors and staff leading the team and Human Resources and Information Services staff. We knew the full transition would take a couple years as the staff required a lot of training due to the complexity and scope of the software’s capabilities.

The basic payroll software was initially introduced in December, 2003, in the Food Services area and was fully implemented by all areas of the College in 2004. There were many stages to the implementation and training processes. The Benefits module was not fully completed until 2006 due to the complexities of the benefit rules for eight different pay classes. The software has been customized to meet most of our requirements. These customizations were not realized in the beginning but progressed rapidly with excellent support from our dealer.

The system runs on a server with Microsoft Sequel database as the operating system. The server and Microsoft Sequel database software will be upgraded in 2007 to allow for additional features and redundancy. The Information Services staff handles the
server and software and does consult with the software dealer when updates are installed. The system can be hosted by the dealer through the internet but this was not available at the time of purchase nor would it be our preference because of possible internet downtime.

Implementation for the whole college took about a year as we had a large number of supervisors that needed access to the system, currently about 131, which includes all the staff in the Human Resource and Payroll departments, all administrators, and a large number of clerical and classified staff.

We have a part-time employee who is the primary trainer and assists with software issues. The dealer provides most software support. Training is a very significant part of the development of the system and is ongoing. A video training program is in the development process for both the employees and supervisors.

Employees enter their time from a campus PC or from any of 16 time clocks on the two campuses. We do not allow access from any PC off campus. The time clocks use the college proximity ID badge. All employees have an ID badge which also operates the college security and access system. Most full-time clerical and classified employees use their PC for entering time. The clocks are very important to areas such as food service, facilities management, public safety, children’s center and any department employing students and on-call staff. In the past, these employees had to hand-write a timesheet for a two-week pay period; now an electronic time clock calculates their time
automatically. Most buildings have a single time clock but a few have two or three because of the size or for ease of use.

The dealer contracted with a software company, Integrated Design, Inc., [http://www.timebank.com/aboutus/index.html](http://www.timebank.com/aboutus/index.html), for the design of the interface program which uploads the payroll data to the administrative payroll system. This was a difficult process to map out but the software company specialized in this conversion software, Time Bank, so the results were excellent and can be easily modified. We do have to pay a maintenance contract for keeping this software up to date with any changes to the administrative payroll system.

**Benefits**

As with any computerized database the reporting capabilities are endless and provide many departments with better tools to manage their staff. This is more applicable for departments with a large number of employees. Employees using the PC based data entry option have the flexibility to enter their own time. Time clocks are the simplest and most accurate method for many employees to enter their time worked and are seen as technologically advanced and easy to use. The system can document an employee’s negative behaviors when they are absent or tardy by using the scheduling system in conjunction with the time clocks. The system screens are easy to understand and use as they mimic a Microsoft Outlook design. A new supervisor module is now available that has more customizable screen using a dashboard design. We have not yet reviewed this new software but will in 2007.
Here is a list of the benefits outlined in the three categories.

**Payroll Management:**
1. Payroll imports the timesheet data into the administrative payroll system in a few hours.
2. Employees have an easier method to create a timesheet from a PC or time clock.
3. All timesheets are calculated electronically.
4. Supervisors can monitor employee activity at any time.
5. Supervisors manage from an exception method so only errors or problems need to be reviewed and corrected.
6. Paper timesheets have been eliminated but can be printed if necessary.
7. Employees can review current and archived timesheets from their PC.
8. All departments have at least one back-up supervisor.
9. Employees and supervisors authorize timesheets electronically.
10. Payroll can review all timesheets from a variety of reports and exception methods to review accuracy prior to importing.
11. The Payroll staff no longer works overtime to ensure payroll is completed and has more time to review data.
12. Payroll files no paper timesheets (20,000 annually).

**Scheduling Management:**
1. The college has a standardized employee scheduling system.
2. Reporting capabilities are numerous and customizable.
3. Exception reports identify problems and reduce the amount of time required to make corrections.

4. Department schedules can be printed by each employee or by group and posted.

5. Calculation of timesheets is automated.

6. Scheduling tools are numerous and are also displayed in graphical format for easy use.

7. Multiple staff in a department can manage and schedule.

8. Employees with supervisor rights require minimal training when changing positions.

**Benefit Management:**

1. Employees request and supervisors approve time off by use of a PC. This has eliminated all paper requests (10,000 annually) and manual tracking of benefit banks.

2. Accruals of benefit time are automatically processed either monthly or on an annual basis depending on the employee pay class.

3. The supervisor has the ability to see when other employees in the same department are scheduled off or have pending requests to take time off when making a decision whether to approve or deny an employee’s time off request. This allows for quicker decision making and can eliminate scheduling conflicts.

4. Employees manage their own benefit banks and can review current and carry-over balances. (Carry-over vacation and personal business from past year needs to be used by October 31 of the new year.)
5. Human Resource staff has eliminated all paper tracking methods and spreadsheets (300 employees).

6. Human Resource staff can monitor many factors related to benefits and benefit banks.

7. Administrators and supervisors can monitor employee benefit banks and time off at any time.

**Retrospect**

We encountered some resistance to the new processes as change is accepted by people differently. Occasionally, staff would see some of the processes as more work because they have additional scheduling requirements or need to learn new computerized methods. An example of this additional scheduling responsibility is our Children’s Center staff; they need to schedule eight classrooms for coverage from 6 am to 6 pm and the system does not accommodate their needs on a classroom basis. Training manuals from the dealer were too generic and we created our own custom manuals. Historically the college required everyone except administrators and faculty to complete a bi-weekly timesheet. This method can be very repetitive for staff using a PC for their timesheet, and we are looking to auto fill time worked from schedules and allow for just corrections to be made. Training continues and we are just beginning the process of creating training videos so staff and supervisors can get immediate training upon hiring and orientation. It would have been advantageous to have video or computerized training methods in the beginning. The benefit module was slow to implement because the Human Resource staff was in the process of negotiating most of
the union contracts and did not have the time to get all the accrual policies written and tested.