

STAFF System User Guide

AWR - outline of support software

version 2.1

January 2012

0. Document

This is version 2.1 of the document, it describes the latest facilities within the STAFF system to assist users with managing their AWR responsibilities. It completely replaces the previous versions reflecting the updated version of the software.

Previous versions:

V2.0 – a faulty version, withdrawn

v1.0 – initial version

There are likely to be updates to reflect the anticipated minor changes to Reports.

1. Overview

There are two main parts to the support for AWR within the STAFF System:

- a twelve-week continuous employment report
- addition to Hours Entry to support 'rolled-up' processing of any additional holidays

The report is a completely new facility while Hours Entry simply has some features added to allow for the marginal rates for the additional holidays

2. The AWR 12-week report

2.1 Overview

This is a completely new report that allows you to find Temps who have been working continuously for the same client for twelve weeks. However the report has a number of parameters and with these you can refine the output considerably; in particular, you can choose the number of weeks so that you can find Temps at, for example, 10 weeks continuous work and use the report to identify those Temps that are approaching the 12 week eligibility threshold and so can ensure that you have met all of your Agency's responsibilities well in time.

We would suggest that the report is run as a part of your normal weekly processing, perhaps after completing your payroll and invoicing cycle for the week. This will ensure that the 12-week report is run using the most recent timesheet data because it is from the timesheets that the report performs its calculations. However in practice the report can be run at any time but it always reports relative to the most recent payroll date.

The report does have several parameters so that it can be used in a variety of situations depending on your practices. In many cases where your Temps tend to work at single assignments for one client at a time then you will probably just need the default that provides an AWR analysis for the timesheets at that client. However if the Temp works on several assignments for the same client (usually sequentially, but, perhaps, simultaneously) then seeing the assignments separately (LIST ASSIGNMENTS=Y) and even analysed separately (ANALYSE ASSIGNMENTS=Y) may be required.

If you want you can run the report to find those Temps about to reach the eligibility threshold of twelve weeks – for example setting Minimum Duration to 10 and Maximum to 12 weeks would show all Temps whose eligibility 'clock' has reached 10, 11 or 12 weeks, and this is the most likely regular use of the report. However by setting Minimum to 0 and Maximum to 3 it would report those Temps with up to 3 weeks on the clock, that is the new starters. Conversely by setting Minimum to 12 and Maximum to 99 the report would list all of those Temps who had

already reached the eligibility threshold.

Running the report

At any menu enter

RP

in the Make a Selection box, and then

Prog name

S2T12WRP and press RETURN

Program switch

just press RETURN

NOTE – we can usually add the program to an existing menu should you require, please call support for details.

The report parameter screen

The initial screen is displayed as shown below:

```
TEMP for 2003/04          ---*** THE STAFF SYSTEM ***---          23/ 1/12
                                TEMP 12 WEEK REPORT

ENTER TEMP: [ _          ]
                Enter name or ALL for all temps

The report will list all Temps who have been in the same job between
the specified minimum and maximum number of weeks

MINIMUM DURATION : [10] WEEKS
MAXIMUM DURATION : [12] WEEKS
REPORT ORDER :    [N] N - by temp Name, W - by eligible weeks
LIST ASSIGNMENTS : [N] (Y/N)    ANALYSE ASSIGNMENTS : [Y] (Y/N)
                                LIST TIMESHEETS : [N] (Y/N)

SAME CLIENT ONLY : [Y] (Y/N)
SHOW ALL TEMPS :  [Y] (Y/N)

S2T12WRP/B08
```

The parameter fields are described below:

ENTER TEMP

Usually this report would be run for all Temps but it can be run for a single Temp by entering the name, or by using the ? Search term.

MINIMUM DURATION

MAXIMUM DURATION

The program will search for Temps with particular AWR eligibility employment durations. It will analyse the timesheet data and determine the current AWR clock count and will use the 'Minimum ' and 'Maximum Duration' figures to select those temps to report. Temps will be reported who have a count at a client of at least 'Minimum Weeks' duration and not more than 'Maximum'. So, using the defaults above the report would show those Temps who have AWR clock counts of 10, 11 and 12 weeks. See also 'SHOW ALL TEMPS' which overrides the settings of Duration.

If you want to select all Temps who are already eligible then enter 12 for the Minimum and 99 for the Maximum. Similarly if you want to only show those Temps beginning work you can enter a Minimum of 1 and some Maximum.

Note that unless you do use SHOW ALL TEMPS any Temp whose AWR "clock" has been reset to zero (more than 6 weeks without an eligible week) will not be reported.

REPORT ORDER

The report lines are usually ordered in Temp Name order ('T') but alternatively they may be ordered by the number of weeks eligible ('W') so that using the example above those Temps with a clock count of 10 weeks work would be listed first followed by those with 11 weeks and then 12 weeks.

LIST ASSIGNMENTS

If this is set to 'N'o (the default) each employment is shown as a pair of lines for each client with all assignments for that client combined into one week-by-week line. When it is set to 'Y'es then additional lines will follow the standard lines showing all assignments in that employment with their individual week-by-week breakdown. Very often the employment will only involve a single Assignment but it is possible that the employment may consist of the Temp moving from one Assignment to another without any gaps and this may constitute a continuous employment in AWR terms.

ANALYSE ASSIGNMENTS

If this is set to 'N'o (the default) the AWR analysis is only carried out at client level where if there is more than one assignment these assignments are combined and the AWR analysis is carried out on the combination. When this is set to 'Y'es then (provided you have LIST ASSIGNMENTS=Y) there will also be an AWR analysis performed on each assignment as well.

LIST TIMESHEETS

If this is set to 'Y'es (the default is 'N'o) each timesheets is reported following the client or assignment (if LIST ASSIGNMENT = Y) analysis lines. Because of the likely high volume of the output if this is requested for when reporting for ALL Temps the user is asked to confirm the selection.

SAME CLIENT ONLY

In almost all cases this will be set to 'Y'es because in AWR terms a continuous employment has to be with the same Client, however in some cases there may be Clients that are recorded as separate Clients within the STAFF database but in reality are a single 'Hirer' in AWR terms. For example we are aware of Clients that require separate invoicing for different

departments and these are set up as separate clients in STAFF but in AWR terms would be a single 'Hirer'. When set to 'Y'es all timesheets are combined and analysed as a single 'Combined client'. These situations may require some clarifications but this option does allow a greater degree of flexibility.

SHOW ALL TEMPS

When set to 'N'o (the default) only those Temps that fall within the 'Minimum' and 'Maximum Duration' criteria will be reported. When set the 'Y'es the report will contain an entry for every temp even if they do not meet the 'Minimum' and 'Maximum Duration' criteria. This may be a useful tool as a general report but we invite comments.

NOTE - this may not remain in the final version

As usual you will be asked to select the output device (Screen, Printer or File) and depending on how you system in configured you may be asked about which branches are to be processed.

The report output - Summary

This is a simple output (a more realistic sample will replace this shortly) with the LIST ASSIGNMENTS option set to 'N'o (and SHOW ALL TEMPS set to 'Y'es)

```

TEMP for 2003/04          ---*** THE STAFF SYSTEM ***---          23/ 1/12
                                                                PAGE:  1

          TEMP AWR CONTINUOUS JOB REPORT -  PAYROLL DATE 24/04/06

REPORT FOR TEMP : ALLEN SUE
  ABC COMPANY LT      ( 2)  Clock : counting   Num Wks :   1
                    WW.....W
  CROWN INSURANC     ( 1)  Clock : counting   Num Wks :   1
                    W.....W
  ABC COMPANY LT      ( 2)  Clock : counting   Num Wks :   1
                    WW.....W
  BELL BROS           ( 1)  Clock : reset -> 0
                    W.....
BROWN JOHN           nothing to report
REPORT FOR TEMP : CARTER JAMES
  AIR UK LTD          ( 1)  Clock : reset -> 0
                    W.....
CLASSROOM TEST       nothing to report
REPORT FOR TEMP : EVES PAM Q
  AZ PROMOTIONS      ( 1)  Clock : reset -> 0

          PRESS RETURN FOR SCREEN CONTINUATION OR 'X' TO EXIT [ ]
  
```

Below the Temp name there are a three lines for each client that the Temp has worked for:

```

ABC COMPANY LT ( 2)  Clock : counting   Num Wks :   1
                    WW.....W
  
```

Line 1: the company name; the number of assignments, in brackets, for the period analysed;

and the AWR analysis. This is presented in the form of the result where 'clock' has the following values:

- counting – where Num Wks is the count towards the 12 weeks
- paused – where Num Wks is as above, Interval is the number of weeks since latest work/eligible week
- reset->0 – where the clock has been reset because > 6 weeks since latest work/eligible week

Line 2: the timesheets for the previous 52 weeks with the rightmost position representing the latest payroll week. Each position/week can be:

- . - no timesheet
- W – a worked week with a paid timesheet
- U – an unpaid week with an 'unpaid holiday' timesheet
- H – a holiday week with a paid holiday timesheet

(more values will be added for SPP, S*P etc.)

The report output – List Assignment = Yes

This is a simple output (a more realistic sample will replace this shortly) with the LIST ASSIGNMENTS option set to 'Y'es (and SHOW ALL TEMPS set to 'Y'es)

```
TEMP for 2003/04          --*** THE STAFF SYSTEM ***--          23/ 1/12
                                                                PAGE: 1

          TEMP AWR CONTINUOUS JOB REPORT -  PAYROLL DATE 24/04/06

REPORT FOR TEMP : ALLEN SUE
ABC COMPANY IT      ( 2)  Clock : counting      Num Wks : 1
                    WW.....W
          A0032      Clock : counting      Num Wks : 1
                    WW.....W
          A0029      Clock : reset -> 0
                    W.....
CROWN INSURANC     ( 1)  Clock : counting      Num Wks : 1
                    W.....W
          A0044      Clock : counting      Num Wks : 1
                    W.....W
ABC COMPANY IT      ( 2)  Clock : counting      Num Wks : 1
                    WW.....W
          A0032      Clock : counting      Num Wks : 1
                    WW.....W
          A0029      Clock : reset -> 0

PRESS RETURN FOR SCREEN CONTINUATION OR 'X' TO EXIT [ _ ]
```

3. Handling Additional Holiday Entitlements

3.1 Overview

In the AWR Guidance document from the BIS (HMG Department for Business Innovation and Skills, see page 34) it is explicitly stated that where there is a Holiday entitlement that arises because of the AWR over and above the statutory entitlement (28 days) a possible way to deal with the excess is as part of the hourly/daily rate. This can be done within the STAFF System by adding this extra pay in lieu of holiday as an extra line on the Timesheets (as some users used to do in the form of "rolled up" holiday pay).

If you have any situations where the standard holiday entitlement is above 28 days then please contact us; the methods given below can be used but note that in the example the figures used assume a starting point of 28 days.

This is actually quite straightforward but may seem unduly complicated, certainly when working out the relevant figures, but we hope that the following worked examples will help. But please contact us if you need clarification.

3.2 Working out the additional accrued holiday pay

The Accrued Holiday Pay for any number of days holiday is readily worked out (we can provide you with a spreadsheet if required) and the figures for 28-34 days are given below – note that they are often quoted as a percentage (so the 28 day figure would be 12.07%) but for practical purposes the decimal is more useful.

Number of holiday days	Accrual fraction	Fraction – difference from 28 days
28	0.1207	
29	0.1255	0.0048
30	0.1304	0.0097
31	0.1354	0.0147
32	0.1404	0.0197
33	0.1454	0.0247
34	0.1504	0.0298

Table 3-1 – Holiday days and accrual fractions (the table rounded to four decimal places)

What this means is that: for the standard 28 days holiday, for a gross pay of £100, the Temp would accrue £12.07 as holiday pay; for 29 days the same £100 would accrue £12.55 (an additional 48p); for 30 days the figure is £13.04 (an additional 97p) and so on. The figures for accrued holiday pay are calculated by multiplying the pay by the accrual fraction as above. Of course we wouldn't normally work it out on the gross, the accrual fraction is usually applied to the hourly rate to give an "accrued holiday pay hourly rate" and then multiplied by the hours worked.

Take a more realistic example:

a Temp works 40 hours at £11 per hour. Giving a gross pay of £440

- accrued holiday pay = gross pay * 12.07 % = £53.11
- alternatively "accrued holiday pay rate" = £11 * 12.07 % = £1.3277; and 40 hours * 1.3277 = £53.11

So we can use a calculated "accrued holiday pay rate" and that is what the STAFF System uses to calculate the accrued holiday pay at every payroll run.

The same can be applied, of course, when we want to look at the extra holiday where, for example, our Temp above is now entitled to 30 days holiday. In this case the accrual fraction is 0.1304 (13.04%) and repeating the calculation above

- accrued holiday pay = gross pay * 13.04% = £57.38
- alternatively "accrued holiday pay rate" = £11 * 13.04 % = £1.4344; and 40 hours *

$$1.4344 = £57.38$$

This is £4.27 more than the 28 day figure. And if we look at the third column in the table ("difference from 28 days") we see a figure of 0.0097, and we could use that directly, thus:

$$\text{accrued holiday pay difference} = \text{gross pay} * 0.0097 = £4.27$$

Or if you like we could calculate the additional accrued holiday pay rate and then multiply that by the number of hours

$$\text{"additional accrued holiday pay rate"} = £11 * 0.0097 = £0.1067; \text{ and } 40 \text{ hours} * 0.1067 = 4.27.$$

This means that in order to calculate the additional "accrued holiday pay" (which we can pay with the ordinary pay) we just use the "difference from 28 days" fraction to derive the "additional accrued holiday pay rate" and then multiply that by the number of hours worked..

To summarise for the above example:

Number of holiday days	Accrual fraction	Accrued holiday pay rate	Difference from 28 days fraction	Accrued holiday pay difference rate
28	0.1207	1.3277	-	-
30	0.1304	1.4344	0.0097	0.1067

Table 3-2 – Summary for £400 gross pay example

At this stage we have shown that the figures in Table 3-1, in particular the "difference from 28 days fraction" can be used to calculate the additional accrued holiday pay. The question is what do we do with this now ?

3.3 Entering the data in the Timesheet

3.3.1 As a Cash rate

What we can now do is to calculate the pay rate for the additional accrued holiday and this can be entered directly into the timesheet as in Figure 3-1 (using the same example)

** image needed – hours entry – Cash with pay in lieu of additional holiday in overtime line

Figure 3-1 Hours Entry

That is straightforward although it does mean that you will have to calculate the additional accrued holiday pay rate for every assignment, but having done that you then just use the rate as a Cash rate on the timesheet with an appropriate description (see 3.3.3 for clarification). And the STAFF System does offer a method for recording overtime rates for each assignment so once calculated these figures can be stored against the appropriate assignments and these will be loaded into the timesheet when they are created for you to use in Enter Hours (see 3.3.4)

3.3.2 As a Multiplier rate

There is another way to use Table 3-1 which might prove easier but it does depend on the use of Multiplier rates on your timesheets. In a timesheet the overtime rates can be referred to as Multiplier rates where the Multiplier figure entered in the timesheet overtime rate columns multiplies the standard pay (and charge) rates, for example week day overtime might be 1.5 (i.e. time and a half) while weekend might be 2 (double time).

** image needed – hours entry – simple Multiplier

Figure 3-2 Hours Entry, simple use of multiplier rates

As we showed in 3.1 we can use the "difference from 28 days fraction" to calculate the additional accrued holiday pay rate by multiplying the fraction by the pay rate so we can use this fraction as a Multiplier on the timesheet. The Hours Entry screen shown in Figure 3-2 will result in the same pay calculations as that in Figure 3-1.

** image needed – hours entry – Multiplier with pay in lieu of additional holiday in overtime line

Figure 3-3 Hours Entry

The advantage with this method is that you do not need to calculate the additional accrued holiday pay rate for each assignment, you just use the "difference from 28 days fraction" figure which is appropriate for that assignment.

Note that there is an updated version of the Hours Entry program that is available which allows the entry of rates to four decimal places; this is necessary when using Multipliers because of the magnitude of the fractions required.

3.3.3 Cash or Multiplier

This can be set on each Timesheet as you enter data but if you will be mainly using one then it is better if that choice is set up as the default. This can be readily done as follows:

At any menu enter RP,

- program name - S2PARAMUP and press enter
- program switch – just press enter
- branch ID – 0000 and press enter
- Do you want to see Header Indicators – Y and press return

```

TEMP for 2003/04          ---*** THE STAFF SYSTEM ***---          17/ 1/12
PARAMETER FILE MAINTENANCE
BRANCH ID [0000]
-----
GENERAL
T/S print indicator [N] Rate type Cash, Mult [C] Ass confirm to C,T,B [ ]
Tax expenses deflt YN[Y] False front Y/N [N] Central payroll Y/N [N]
Expected Hours Y/N [N] Single Branch Y/N [N] Tsheet Stationery Y/N[Y]
Assign remarks Y/N [Y] invno-prefix M, B. [ ] Assign history Y/N [N]
Asgn clear complete? [Y] Print Assign rems Y/N [Y] Tsht days in week 5-7[5]
Print tprate on tsht [N] Ask for tsheet seen? [Y] Default tsheet seen [Y]
Pay if ts not seen ? [Y] Inv if ts not seen ? [Y] Comment if not seen? [Y]
Purchase order Y/N? [Y] Write to staff08 Y/N?[Y] Holiday pay default [ ]
Printp menu PAGC [B] Job complete default [Y] Rates on skill B, O [ ]
Rates on assign Y/N [Y] Temp Availability Y/N[N] Ass confirm rems 0123[ ]

Max temp pay rate [05.00] Max client rate [10.00] Warning hours T/S [040]
Assign clear date [000000] Hold ashist mnths [00] Hold invhst mnths [00]
Max margin percent [00.00] Min margin percent [00.00]
S2PARAMUP/B05
    
```

Figure 3-5 Parameter Maintenance – Header Indicators

The relevant parameter is in middle column of the first line, amend this to C for cash or M for multiplier as required and press return.

- Type A to Accept ... - enter A and press return
- you can reply N to the remaining "Do you want to see..." questions
- at Branch ID, leave blank and press return to get back to the menu

3.3.4 Rates on Assignments

There is a way of recording overtime rates against any Assignment and having done that these rates will be used as the default rates when a Timesheet for that assignment is created in Hours Entry. You may already be using this feature but if not you may not be aware of it because it does depend on a parameter setting. In fact it is shown in Figure 3-5, left column, bottom row, "Rates on Assign". When set to N there is no Rate record but when set to Y each Assignment may have an additional Rates record where the standard and overtime rates can be set.

Having changed the parameter to Y, when you open the assignment (STAFF Record → Assignment Details) you will be asked the additional question "Do you wish to see pay and charge rates?" and if you reply Y you will be given this screen in figure 3-6. Here you can set the rates as Cash or Multiplier values as you choose, the description and the Cash/Multiplier setting all of which will be copied in to the Timesheets for this Assignment as the default values. Note that on this screen you must set all appropriate rates here, including the standard pay and charge rates, which will no longer appear on the first assignment screen.

NOTE. On the Assignment Rates screen, rates can only be stored to two decimal places so they should not be used to store the Multiplier figures which must be used as four decimal places to ensure accuracy.

```

TEMP for 2003/04          ---*** THE STAFF SYSTEM ***---          18/ 1/12
                          ASSIGNMENT RECORD
ASSIGNMENT NUMBER: [A0034] Enter Assignment Number then press RETURN.
                          Please enter 'N' if a New Assignment.
                          To return to menu just press RETURN.
-----
BASIC PAY RATE: [ 0.00]   BASIC CHARGE RATE: [ 0.00]
OVERTIME PAY RTE: [ 1.20] OVERTIME CHARGE RATE: [ 1.25] DESC: [Daily o'time]
PAY RATE: [ 0.00]       CHARGE RATE: [ 0.00] DESC: [
PAY RATE: [ 0.00]       CHARGE RATE: [ 0.00] DESC: [
PAY RATE: [ 0.00]       CHARGE RATE: [ 0.00] DESC: [
PAY RATE: [ 0.00]       CHARGE RATE: [ 0.00] DESC: [
Is O/Time rate a multiplier or cash? M/C [C]
Maximum number of hours at basic rate [ 0.00]

S2LDRTES/B02

```

Figure 3-6 Assignment Rates screen

Please call if you have any queries regarding this process.

Olympic Computers Limited

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