

Objectives & Benefits

Understand and correctly implement WorkRecords processes so you can:

- Invoice your client accurately and on time
- Collect payroll data for your workers
- Ensure accurate communications and reports
- Reduce rework

Additional Resources

To ensure that you can easily and correctly utilize the basic features of the WorkRecords system, be sure to take advantage of the most current training tools via our support site at <https://workrecords.freshdesk.com>

- Review and follow the *Supplier GoLive Roadmap* and use it as a reference for available training/refresher resources
- Review the GoLive Checklist below
- Utilize our support site training tools or contact support@workrecords.com for any last minute questions

GoLive Checklist

Staff Preparation for GoLive

- Confirm all team members have access in to www.workrecords.com
- Confirm all team members have access to WorkRecords Support Site - <https://workrecords.freshdesk.com>
- Confirm all team members have completed training
- Designate team member(s) to supervisor workers onsite as they use the Kiosk to check-in/out on the first day and ensure they:
 - Understand how to properly register magnetic swipe cards
 - Have access to the worker's SSN as entered into WorkRecords
 - Understand buyer's convenience/check-in rules (window of time for checking in/out with defined start and end times)
 - Know if workers need to check in/out for breaks (for example, at meals)
- Ensure security photos are uploaded
- Confirm back office staff is prepared for following requirements:
 - Produce a single weekly invoice
 - Present invoices through WorkRecords rather than mailing, faxing, or emailing invoices
 - Confirm the total amount on the invoice matches the amount that must be paid (all billing items, adjustments etc. must be reflected in WorkRecords).

Operations

- Ensure Kiosk training document is posted near the Kiosk
- Review all orders in WorkRecords to ensure that a "timeclock order" is available for each worker expected to start with the correct start date entered
- Confirm that swipe cards were created for each worker when they were trained to use the kiosk.
- Confirm that workers understand they are being paid by the kiosk selections and not by any manual sign in process
- Make sure workers know their SSN

Confirm that you have scheduled a Review Call with the client and your WorkRecords Implementation Representative to discuss progress, issues, and action items one week following your *GoLive!* (For tips on this call, see page 2.)

QUICK GUIDE: GOLIVE SUPPLIER ACTIVITIES & CHECKLIST

Review Call Tips

Get it on the calendar

- Contact your client and Implementation Representative to arrange this 15-20 minute meeting
- Send an email or meeting request to confirm the meeting date, time, and logistics

Prepare for the Review Call

- Refer to the GoLive Roadmap found at <https://workrecords.freshdesk.com> and reflect on the steps you've taken so far
- Review the details below to consider things that might be discussed during this call:
 - were all my orders entered prior to the worker's start date/time
 - were my workers trained with regard to Check-in/out procedures
 - were all my security file photos uploaded AND were my workers' security photos at check-in and check-out usable
 - did I review punches daily to ensure my workers were checking in and out correctly
 - did I review if any of my workers forgot to check out at the end of their shift or have an unusually large number of hours
- Before the actual meeting (as you are conducting activities related to Going Live), capture things you want to remember to discuss. Encourage team members to add their thoughts
- Have a list of any challenges you and your team experienced during the preparation for the GoLive and the first week

Notes:

Participate in the Review Call

- As you participate in the call, take notes – especially about any action items you commit to

Notes:

Follow Up on any commitments you made and contact support@workrecords.com with any questions or ideas to improve the process of GoLive preparation, training or training tools