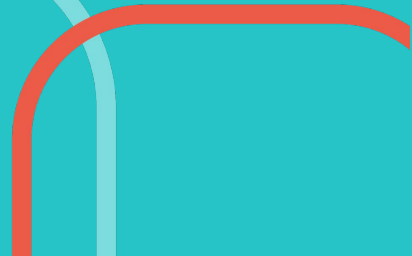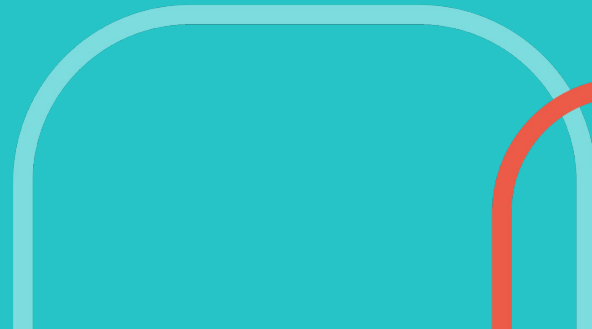**WEBINAR**

Aligning HR Best Practices with Time Tracking for Your Firm

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THE OPTIMAL ACCOUNTING, HR & OPS TEAM

Meet Your Experts

Jilian Dimitt, SPHR, SHRM-SCP
VP of Human Resources
Optima Office

Dana Sarbluescu
Director of Accounting
Optima Office

Today's agenda

- HR best practices for a good timekeeping system

- What qualifies as an exempt employee?

- The rules and potential risk exposure of HR compliance

- How to leverage BigTime's time tracking to build custom over-time reports

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How to assist payroll when setting up your timekeeping system

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Two things to consider when setting up your timekeeping system:

- Have key policies established prior to setting up timekeeping system:
  - Sick leave
  - Vacation
  - Full and part time hours requirement

- Make sure that employees are classified correctly with non-exempt or exempt status

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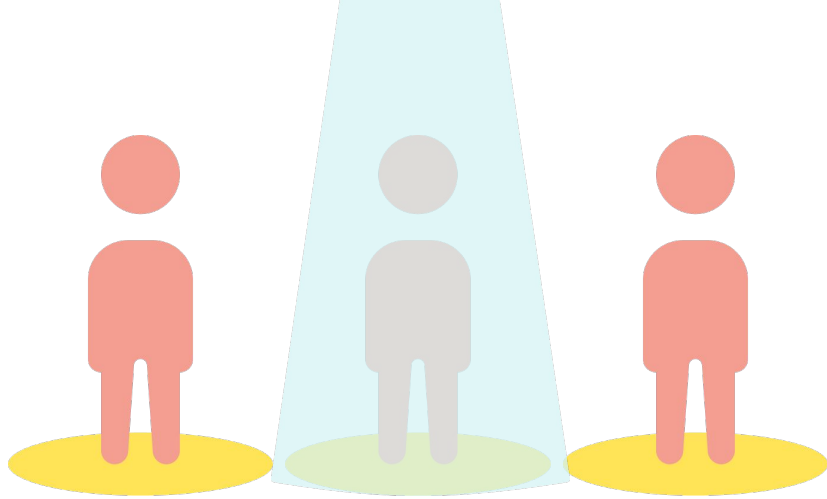
Non-Exempt Employees

For more information on
FLSA Overtime information.

These are hourly employees with overtime:

- Hourly employees are entitled to overtime compensation paid out depending on where the work is being performed.

- In California, overtime is paid for hours worked over 8 hours per day and 40 hours per week.

- In many other states, Overtime is paid for all hours worked in excess of 40 hours per week.

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Exempt Employees

?
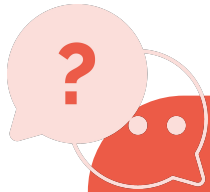
Some definitions are more difficult to classify such as Sales or Software professionals.

*For specific guidance on these roles look here.*

Some employers think it is easier to just classify all their employees as exempt - that is a serious error.

Who qualifies as an exempt employee:
- Have primary duty of managing a company or a department within the company
- Direct the work of at least 2 or more other full-time employees or their equivalent, and
- Have the authority to hire or fire other employees

Employees exempt from the FLSA typically must be paid a salary above a certain level and work in an administrative, professional, executive, computer or outside sales role. The Department of Labor (DOL) has a duties test that can help employers determine who meets this exemption criteria.

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Meal Breaks in California
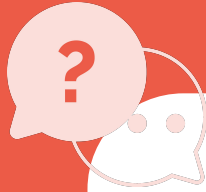
Resource for meal break DOL requirements and rules specific to other states.

- ½ hour is required if work is for more than 5 hours per day, EXCEPT when the workday will be completed in 6 hours or less AND there is a meal waiver in place.

- The meal break must be started prior to the end of the 5th hour (By 4:59 in your shift)

- An employer may not employ an employee for a work period of more than 10 hours per day without providing the employee with a second meal period of not less than 30 minutes except that if the total hours worked is no more than 12 hours, the second meal period may be waived by mutual consent but only if the first meal break period was not waived.

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How to set up your timekeeping system for HR compliance

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Step by Step:
Timekeeping & HR Compliance

- Meet with HR, understand company policies and laws around timekeeping (how the pay period is defined, time off policies, overtime)
- Define data points needed at Staff Level:
  - Employee work state
  - Exempt/Non exempt status
  - Employment Type (Full Time/Part Time)

BigTime Tip: Leverage custom fields

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Step by Step: Timekeeping & HR Compliance

- Decide if you want to utilize BigTime for payroll import batches into your payroll system. Additional fields suggested for Staff profile:
  - Compensation Type (salary, hourly)
  - Compensation amount => pay attention to user rights settings and ensure only authorized staff in BigTime has access to this information
  - Employee number (match it to your payroll system if applicable)

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Step by Step: Timekeeping & HR Compliance

- Define the Tasks/Roles that have relevance for payroll and HR compliance:
    - Vacation, Sick Time, Holiday
        - Who gets assigned to these (eligibility)
        - Defined as non-working hours, do not count towards overtime
    - Overtime
    - Meal Breaks (for CA and potentially other states)

BigTime Tip: Leverage Role Type to define these as non-working, to exclude them from overtime.

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| Week | Day | Add Timesheet Row | Clear Blank Rows | < 2022-07-04 > | 🖨 | ⬛ ▾ | ⚙ |

Job ⇕	Role	Labor Code	Mon 7/4	Tue 7/5	Wed 7/6	Thu 7/7	Fri 7/8	Sat 7/9	Sun 7/10	Total Hours
⬛ - Southern California	Accounting Manager		--	🔒 08:00	🔒 08:00	🔒 08:00	🔒 08:00	--	--	32:00
⬛ - Southern California	Accounting Manager	Overtime	--	--	--	🔒 01:00	🔒 02:00	--	--	03:00
Optima Office:Optima Office Admin	Meal Break		--	--	--	--	--	--	--	--
Optima Office:Optima Office Admin	Meal Break		--	🔒 00:30	🔒 00:30	🔒 00:30	🔒 00:30	--	--	02:00
Optima Office:Optima Office Admin	Holiday		🔒 08:00	--	--	--	--	--	--	08:00
Overall Totals			08:00	08:30	08:30	09:30	10:30	--	--	45:00

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Step by Step: **Timekeeping & HR Compliance**

- Set up the proper reporting
  - Tip: set up reporting groups to keep related reports together (e.g. Payroll group)

  - Daily Overtime report:
    - Screenshare example
    - Filters used: non-exempt employees, work state, summary of daily totals working hours

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Payroll

ⓘ Commission Summary for Payroll workbook	ⓘ Timesheet Detail for payroll workbook Dana
ⓘ New Employees this month	ⓘ Employee List for Payroll
ⓘ Weekly Totals for OT	ⓘ Expense Reimbursements for Payroll
ⓘ Timesheet Detail for payroll workbook	ⓘ Employee List for Payroll
ⓘ Weekly Totals for OT	ⓘ Daily hours Hourly Employees with Meal Break
ⓘ Expense Reimbursements for Payroll (5/23/2022)	ⓘ Daily Totals by EE for OT

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Step by Step: **Timekeeping & HR Compliance**

- Weekly Overtime report
  - Screenshare example
  - Consider how weekly overtime aligns with your pay periods
  - Filters used: non-exempt employees, work state, summary of weekly totals working hours
- Meal Breaks
  - Screenshare example

Avoid costly mistakes! Train your payroll staff and ensure good reporting.

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Thank you!

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We'd love to hear from you

BigTime

BigTime.net

sales@bigtime.net

(312) 346-4646

Optima Office

For HR or Accounting Support please reach out to info@optimaoffice.com or call 858-283-1234. Optima provides HR Assessments and fractional Accounting and HR services.

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