

Advanced OT (Overtime)

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Synopsis:

With Payroll Now's Advanced OT feature, you can have several OT setups depending on State, Union, Position, etc. And you can set if you use blended daily rates in the OT calculation, consecutive day OT, daily OT, and doubletime. In the 'additional payroll setup' table is where you would turn which parameters will be filtered when looking for the correct record

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1. ACCESS THE 'ADDITIONAL PAYROLL SETUP'

- Navigate to 'Payroll Setup'
- Select 'Additional Setup' page action in Payroll Setup table.

Payroll Setup

Get Tax Settings **Additional Setup** Actions Fewer options

General Show less

Solution Version	PY15.0.3.0	Only Show Current Ye...	☐
Tenant ID	msft1a6720f83494295	45 Day Duration Check	☒
Country	US	Allow Manual Holidays	☒
Hours per Week	40.00	Amount Rounding Pr...	0.01
Weeks per Year	52.00	Hours PTO Accrual R...	0.01
Overtime Multiplier	1.50	Federal Tax Rounding...	1.00
Payroll Calendar Code		Read Overtime from I...	☒
Default Bank Account...	B010	Auto-Approve Time E...	☒
Display Employer Taxes	☒	Allow Deletion of Ho...	☐
Display Employer Co...	☒	Verify Payroll Docum...	☐
Gen. Journal Template	USPY	Set Posting Date Equ...	☒
Gen. Journal Batch	DEFAULT	Set Salary / Deductio...	Payment Date

Payroll Batch Setup Show more

- Check off appropriate boxes in 'Advanced OT Setup'

The screenshot shows the 'Additional Payroll Setup' page. The 'Advanced OT Setup' section is highlighted with a red box. It contains the following settings:

- Use Advanced OT / DT Calculations: ☒
- Filter by State: ☒
- Filter by Position Code: ☐
- Filter by Position Department: ☐
- Filter by Position Category: ☐
- Filter by Union Code: ☒
- Use Override OT/DT Rate Setup: ☒

Below the 'Advanced OT Setup' section is the 'Salary Modification Setup' section, which includes a dropdown for 'Hours Details Salary Modification Field' set to 'Position Category' and a text field for 'Hours Details Salary Modification Code' set to 'SALARYMOD'.

Use Override OT / DT Rate Setup: If set to True its going to make 'Overtime Rate Override Settings' available in the OT Setup Card. See below

This screenshot is similar to the first one, but the 'Use Override OT/DT Rate Setup' toggle is highlighted with a red box. The settings are:

- Use Advanced OT / DT Calculations: ☒
- Filter by State: ☒
- Filter by Position Code: ☐
- Filter by Position Department: ☐
- Filter by Position Category: ☐
- Filter by Union Code: ☒
- Use Override OT/DT Rate Setup: ☒

The 'Salary Modification Setup' section remains the same, with 'Position Category' selected for the field and 'SALARYMOD' for the code.

← ADVANCED OT SETUP    ✓ SAVED 

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 Daily Overtime Rules  **Overtime Rate Override Settings** More options: 

Codes

Position Code		Union Code	UNION A
Position Department		State	CA
Position Category			

General Settings

Show less

Use Imported Overtime / Doubletime	☐	Use Payroll Code Level Rate Calc	☒
Allocate Overtime / Doubletime	☐	Rounding Precision	0.01
Use Daily Overtime / Doubletime Hours	☒	Rounding Direction	▾

Overtime/Doubletime Multipliers

Overtime Multiplier	1.50	Doubletime Multiplier	2.00
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- Overtime Override

1. This allows you to override the normal OT calc with a fixed number if it sees this information in the Hours Detail Line and its calculating OT.
2. For example, if you have a job and a task that should pull a prevailing wage OT rate, you would first select those check boxes in the 'Overtime/Doubletime Rate Override Settings' tab.

← ADVANCED OT SETUP  +  ✓ SAVED 

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 Daily Overtime Rules  Overtime Rate Override Settings | [More options](#)

[Overtime Settings >](#)

[Doubletime Settings >](#)

Overtime/Doubletime Rate Override Settings

Position Code Filter 	Payroll Dim. 4 Filter 
Position Department Filter 	Payroll Dim. 5 Filter 
Position Category Filter 	Payroll Dim. 6 Filter 
Union Code Filter 	Payroll Dim. 7 Filter 
Job No. Filter 	Payroll Dim. 8 Filter 
Job Task No. Filter 	Custom Dim. Alloc. 1 Filter 
Payroll Dim. 1 Filter 	Custom Dim. Alloc. 2 Filter 
Payroll Dim. 2 Filter 	Custom Dim. Alloc. 3 Filter 
Payroll Dim. 3 Filter 	Custom Dim. Alloc. 4 Filter 

1. Then you would click 'Overtime Rate Override Settings' page action to set the Job, Job Task and applicable rate

 Search  New  Edit List  Delete Page

EDIT - OVERTIME RATE OVERRIDE SETUP

  

Job No.	Job Task No.	Overtime Rate	Doubletime Rate
→ DEERFIELD, 8 WP	DEE1100	55.00	0.00
GUILDFORD, 10 CR	1120	62.50	0.00



- Use Imported Overtime/ Doubletime Hours
 1. This allows you to use imported hours to calc OT and DT.

- Allocate Overtime/ Doubletime

This will allocate OT / DT throughout the week proportionately. For example, if an employee gets paid OT after 40 hours per week and the employee works 5 extra hours

1. on Friday for a total weekly hours of 45, this feature will allocate 1 hour of OT per day throughout that week.

- Daily Overtime / Doubletime

1. This settings just means that the system will look to the Daily Overtime / Doubletime rules that need to be setup in the Daily Overtime Rules.

- Set Holiday as Overtime

1. When set to True, if an employee has a holiday in their work calendar and they book time on that day, the system will automatically apply the OT or DT rates to those hours.

- Use Payroll Code Level Rate Calc

1. If set to True, you can set the pay codes that go into OT by pay code

2. ADJUST or CREATE ADVANCED OT SETTINGS

NOTE: At the top of the payroll setup table 'Read OT From Imported Hours' must be turned off in order for the Advanced OT Setups to work

Payroll Setup

Get Tax Settings Additional Setup Actions Navigate Fewer options

General [Show less](#)

Solution Version	PY15.4.0.0	Only Show Current Ye...	☐
Tenant ID	msft1a6720t83494295	45 Day Duration Check	☒
Country	US	Allow Manual Holidays	☒
Hours per Week	40.00	Amount Rounding Pr...	0.01
Weeks per Year	52.00	Hours PTO Accrual R...	0.01
Overtime Multiplier	1.50	Federal Tax Rounding...	1.00
Payroll Calendar Code		Read Overtime from I...	☒
Default Bank Account...		Auto-Approve Time E...	☒
Display Employer Taxes	☒	Allow Deletion of Ho...	☐

To access the 'Advanced OT List'

- Enter 'advanced ot' in BC Search Box
- Click 'Advanced OT List'

Tell me what you want to do

advanced ot

Go to Pages and Tasks

> Advanced OT List Administration

Documentation [Show all \(17\)](#)

- Select an existing 'Advanced OT' or create a new one

← ADVANCED OT LIST

Search **+ New** Manage Page

Position Code ↑	Position Department ↑	Position Category ↑	Union Code ↑	State ↑
-	:		UNION A	CA

In the 'Advanced OT Setup' page, you can make the necessary adjustments.

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Actions

Codes

Position Code		State	CA
Position Department		Rounding Precision	0.01
Position Category		Rounding Direction	=
Union Code	UNION A		

General Settings Show less

Use Imported Overtime / DT Hours	☐	Use Daily Overtime / Doubletime Hours	☒
Allocate Weekly Overtime	☐	Use Payroll Code Level Rate Calc.	☒

Overtime/Doubletime Multipliers

Overtime Multiplier	1.50	Doubletime Multiplier	2.00
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Overtime Settings

Weekly Overtime Hours	40.00	Set Holiday as Overtime	☐
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Doubletime Settings

Use Doubletime	☒	Set Holiday as Doubletime	☐
Weekly Doubletime Hours			

Allocate Weekly Overtime : If set to true, this will allocate overtime and double time proportionately throughout the week. If this is set to false, the last entries of the week will be considered overtime / double time

Use Payroll Code Level Rate Calc : If this is set to true, the blended earnings rate used to generate overtime and double time will be calculated based on the payroll code setting 'Use in Blended OT/DT Rate Calc'. If this is set to false, all earnings of subtype regular, additional rate, and pay matrix that have hours in the payroll lines will be used to calculate the blended rate.

Set Holiday as Overtime: If set to true the holiday hours worked will automatically be overtime hours. The system will use the payroll calendar linked to the employee to calculate this

Set Holiday as Doubletime: If set to true the holiday hours worked will automatically be double time hours. The system will use the payroll calendar linked to the employee to calculate this

DAILY OVERTIME RULES

You can access ‘Daily Overtime Rules’ by:

- Click ‘Actions’
- Click ‘Daily Overtime Rules’

← ADVANCED OT SETUP

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Actions

Daily Overtime Rules

Position Code

Position Department

Position Category

Union Code

UNION A

State

CA

Rounding Precision

0.01

Rounding Direction

=

General Settings

Show less

Daily Overtime Rules Table:

← DAILY OVERTIME RULES ✓ SAVED

Search + New Edit List Delete Page More options

Day of Week ↑	Overtime Floor	Doubletime Floor	Auto... Overt...	Auto... Doub...	Cons... Day OT/DT Applies	Consecutive Day Doubletime Floor	Number of Consecutive Days
→ Monday ▾	9.00	0.00	☐	☐	☐	0.00	0
Tuesday	9.00	0.00	☐	☐	☐	0.00	0
Wednesday	9.00	0.00	☐	☐	☐	0.00	0
Thursday	9.00	0.00	☐	☐	☐	0.00	0
Friday	9.00	0.00	☐	☐	☐	0.00	0
Saturday	0.00	0.00	☒	☐	☐	0.00	0
Sunday	0.00	8.00	☐	☐	☐	0.00	0
			☐	☐	☐		

DAY OF WEEK: Determines the day of the week that will apply to the rule

OVERTIME FLOOR: Once this number of hours is surpassed on that particular day of the week, Overtime will be applied to any hours above the 'floor'

DOUBLETIME FLOOR: Once this number of hours is surpassed on that particular day of the week, doubletime will be applied to any hours above the 'floor'

AUTOMATIC OVERTIME: If this box is checked, any hours on that day will automatically calculate as Overtime

AUTOMATIC DOUBLETIME: If this box is checked, any hours on that day will automatically calculate as Doubletime

CONSECUTIVE DAY OT/DT APPLIES: If checked, consecutive days rules entered in the following fields will apply

CONSECUTIVE DAY DOUBLETIME FLOOR: All hours that exceed this floor on this day will apply to doubletime

NUMBER OF CONSECUTIVE DAYS: Number of consecutive days worked that will trigger the consecutive day Overtime/Doubletime

The screenshot below would be an example of a 9 hour per date OT floor with automatic OT on Saturday and a consecutive day OT on Sunday with a 4 hour doubletime floor. In this example if an employee worked 6 days straight prior to working Sunday they would be applicable the 4 hour doubletime floor, if not, they would get overtime pay, not doubletime pay, no matter the number of hours they work on Sunday.

← ADVANCED DAILY OVERTIME RULES ✓ SAVED

Search + New Edit List Delete Page More options

Day of Week ↑	Overtime Floor	Doubletime Floor	Automatic Overtime	Auto... Doubl...	Cons... Day OT/DT Appli...	Consecutive Day Doubletime Floor	Number of Consecutive Days
Monday	9.00	0.00	☐	☐	☐	0.00	0
Tuesday	9.00	0.00	☐	☐	☐	0.00	0
Wednesday	9.00	0.00	☐	☐	☐	0.00	0
Thursday	9.00	0.00	☐	☐	☐	0.00	0
Friday	9.00	0.00	☐	☐	☐	0.00	0
Saturday	0.00	0.00	☒	☐	☐	0.00	0
→ Sunday	0.00	0.00 ×	☐	☐	☐	4.00	6

If you need to reduce the overtime/doubletime floor by holiday hours, you can do that with the setting below found inside the payroll calendar attached to the employee:

← PAYROLL PAYROLL - DEFAULT PAYROLL CALENDAR ✓ SAVED

Payroll Calendar Dates

Search + New Edit List Delete Page

Recurring System ↑	Date ↑	Day ↑	Description	Nonw...	Nonworking Hours	Reduce OT Hours Floor by
→ Special Day	1/1/2020	Wednesday	New Year's Day	☒	8.00	☒