
Datatech Accounting Software

Webinar Training

Payroll Refresher



Datatech

Your Source for Ag Software

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Datatech

4910 E Clinton Suite 103

Fresno, CA 93727

Toll free (888) 222-DATA

Fax (559) 226-5418

www.DatatechAg.com

support@DatatechAg.com

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This webinar is designed for existing Datatech users that are familiar with the payroll software. We'll cover various payroll entry methods designed for crew based time sheets. In addition, we'll review Rest & Recovery and Overtimes rules and how those are applied and calculated within the software.

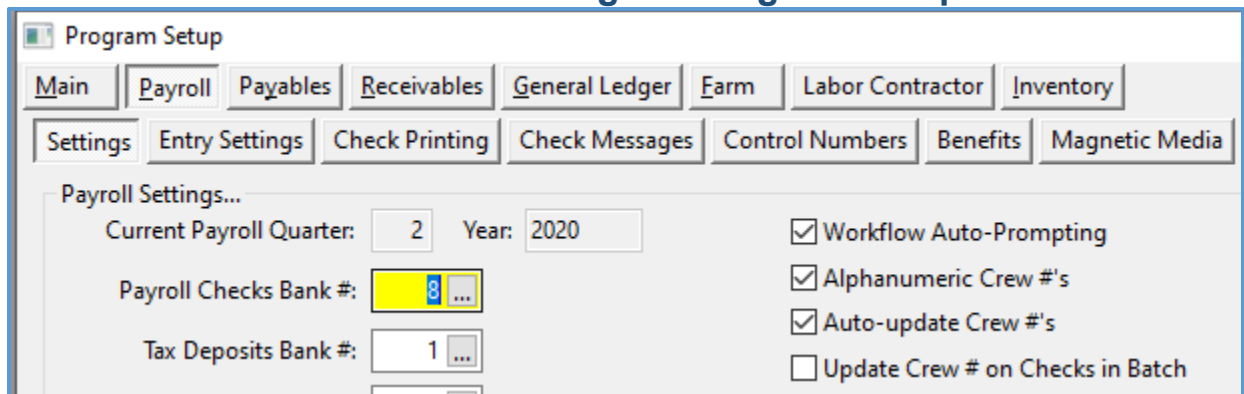
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Crews

Crews can be created to establish core groups or a crew number can be entered “on the fly” during payroll entry. If you have some consistency in the employees on a crew, several payroll shortcuts are available to speed up and improve accuracy in payroll entries.

Crew Settings in Program Setup



The screenshot shows the 'Program Setup' window with the 'Payroll' tab selected. Under the 'Payroll Settings...' section, the following options are visible:

- Current Payroll Quarter: 2
- Year: 2020
- Payroll Checks Bank #: 8
- Tax Deposits Bank #: 1
- Workflow Auto-Prompting
- Alphanumeric Crew #'s
- Auto-update Crew #'s
- Update Crew # on Checks in Batch

The following Crew settings can be adjusted from Tools > Program Setup.

Alphanumeric Crew #'s

The default crew identification is by Crew #. The Alphabetic Crew #'s will change the Crew Setup and Crew entries fields to alphanumeric. This allows you to use up to 4 letters or numbers as an ID. For example, you can use the supervisor's initials or a location abbreviation.

Auto-update Crew #'s

This option will update the Employee file with the last crew the employee work on after printing checks. This is helpful if you don't have pre-set crews. You can see on employee lists, the last crew employees worked on and be able to run employee lists by crew to see who currently is working on each crew.

In addition, you can use tools on the Crew Management window to easily inactivate and terminate multiple employees on a crew at one time.

Update Crew # on Checks in Batch.

When a crew # is changed on an employee account on the entry/edit window, and the employee has a check in the batch that was already created with the employee's former crew #, the program will update the check in the batch with the employee's new crew number when this box is checked.

Crews & Crew Sheets

The Employee Crews window can be used to easily add, remove and move employee between crews.

Select the Crews option on the Payroll menu and this window will open. Detailed Help is available by pressing the F1 key while on this window.

The screenshot shows the 'Employee Crews' window with the following elements:

- Crew ID:** A yellow dropdown menu.
- Description:** A text input field.
- Active:** An unchecked checkbox.
- Supervisor Account #:** A dropdown menu.
- Supervisor Name Key:** A text input field.
- Titles/Rates...:** A button.
- Employees assigned to this crew...:** A table with columns: Acct #, Name Key, Employee Name. The first row is highlighted in cyan.
- Buttons on the right:** Add..., Remove, Move To..., Set Inactive, Terminate, Pay Rates..., Edit Account..., Add Dept...
- Buttons at the bottom left:** Select All, Clear Selections, Invert Selections.
- Crew Sheet Type:** A dropdown menu set to 'Standard'.
- Buttons at the bottom right:** Supervisor List, Print Crew Sheets, Save, Clear, Delete.

Even if you are unable to utilize pre-defined crews, as mentioned above, by using the Auto-Update Crew # option, you can at least maintain current lists of who's working on which crew.

Crew Sheets

If you can utilize pre-printed Crew Sheets, several format options are available.

Some of the Crew Sheet formats have been customized for customers, however these formats are available for any users:

Standard/Fruit Harvest – Weekly Time Sheets

Gulf Harvest – Daily Time Sheet with multiple piece columns

Samco/Tudor – Daily Time Sheets for hourly & piece columns

We are no longer adding customized formats to this list. If you would like to customize your crew sheets, you can use the Excel Template option.

Creating a Template

The template that you create in Excel should print on a single page. The program will look at each cell for specific field names enclosed in square brackets and replace those field names with data from the employee file, crew, or pay period. After replace all of the fields in the template, the program will instruct Excel to print the spreadsheet. If there are additional employees to print (i.e. a large crew doesn't fit on one page) then the template will be cleared, the additional employees will be entered into the template, and additional page that is needed will be printed.

Any data, formatting, borders, etc. that you have set up on the template will be printed as-is. For instance, if you enter you company name in cell A1, then it will print in this position on all crew sheets pages. If you format a field to print bold, then it will be printed in bold on the crew sheet.

Keep in mind as you are designing the form that you can use the Print Preview option in Excel to preview the crew sheet to make sure it fits on a single page. You can also use the Preview button on the Print Crew Sheets window to do a test printout of the crew sheet. Remember though that the program will process and preview one page at a time, so the Preview window will appear for each page. When testing your template, it is best to use a crew with just a few employees.

Field Names

The following fields may be used to insert general information on the crew sheet:

[DATE_TIME_STAMP]

Inserts a date and time stamp for when the crew sheet was generated, similar to the date/time stamp that appears at the top of reports.

[COMPANY_NAME]

Inserts the company name (useful if you have multiple companies that use the same template files).

[COMPANY_ADDR]

[COMPANY_CITY]

[COMPANY_PHONE]

The following fields may be used to insert information from the employee file on the crew sheet:

[EMPL_NAME]

This will insert the employee last name followed by a comma and then the first name.

[LAST_NAME]

This will insert the employee last name.

[FIRST_NAME]

This will insert the employee first name.

[FIRST_LAST_NAME]

This will insert both the employee's first and last name.

[ACCT_NUM]

This will insert the employee account number.

[ACCT_NUM39]

This will insert the employee account number with asterisks appearing before and after the account number and use the "Free 3 of 9" bar code font for this cell, resulting in a Code 3 of 9 barcode.

[TITLE]

This will insert the employee title that is set up on the crew record. For supervisors, the program will automatically insert "Supervisor". If you set up other employees on the Titles/Rates window from the Crew setup, the titles that you entered on that window will be printed here. Any other employees that are assigned to the crew will not have a titled printed.

[SS4]

This will insert the last four digits of the employee social security number.

[PIN]

This will insert the employee's PIN. The PIN is normally the unique numeric identifier/account # used by a third party data collection system.

[BADGE_NUM]

This will insert the employee's badge #. The badge number is normally set by importing it from a payroll data import file. The badge # is a six character alpha-numeric ID.

[PHONE_NUM]

Inserts the employee's phone number.

[CELL_PHONE]

Inserts the employee's cell phone number.

[CELL_OR_PHONE_NUM]

Inserts the employee's cell phone number if one has been entered, otherwise inserts the employee's phone number.

[ALIEN_NUM]

This will insert the employee alien registration number.

[EXP_DATE]

This will insert the employee alien registration expiration date.

[PAY_RATE]

This will insert the employee's pay rate.

[DEPARTMENT]

This will insert the employee's department

The following fields may be used to insert information from the crew record. They would normally be used in the header section of the crew sheet.

[CREW_NUM]

This will insert the crew number/ID.

[SUPERVISOR]

This will insert the crew supervisor's name.

[SHEET_NUM]

The program will insert the next available crew sheet number.

[HASH_TOTAL]

This will print the total of all of the employee account numbers that are printed on the time sheet. This total may be compared to the hash total on the Daily Payroll Entry window and Daily Payroll Reports (assuming that all of the employees on the crew sheet have time and no additional employees are manually added to the crew).

If some employees that are listed on the time sheet do not work, during data entry you can subtract their account numbers from the hash total. Likewise, if there are employees that are manually added to the crew sheet, you can add their account numbers to the hash total.

The following fields are related to the payroll period:

[PAY_PERIOD]

This will insert the payroll period starting and ending dates in the same cell, in the format “starting TO ending”.

[PAY_PERIOD_START]

This will insert the starting date for the pay period.

[PAY_PERIOD_END]

This will insert the ending date for the pay period.

[DAY1] ... [DAY7]

This will insert the day of the week.

[DATE1] ... [DATE7]

This will insert the date for each day in the pay period.

Sample Template

The following screen shot from Excel shows a daily crew sheet template:

The screenshot displays the Microsoft Excel interface with the following elements:

- File Name:** XXX-XX-
- Formulas Bar:** C5
- Worksheet Grid:**
 - Row 1: Crew ID: _____ Week Ending: _____
 - Row 2: GROWER NAME: _____ CROP: _____ PHASE: _____
 - Row 4: **Acct #**, **Employee Name**, **SS #**, **Hours**, **Rate**, **Pieces**, **Rate**
 - Rows 5-31: Data rows with placeholder text: [ACCT_NUM], [EMPL_NAME], [SS4]
 - Row 32: Date: _____ WAGES \$
 - Row 33: Start Time: _____ A.M. Break: _____ FOREMAN
 - Row 34: OUT: _____ IN: _____ OPERATOR
 - Row 35: Stop Time: _____ CAL VAN #1
 - Row 36: Lunch: _____ P.M. Break: _____ CAL VAN #2
 - Row 37: OUT: _____ IN: _____
 - Row 38: SUBTOTAL \$
 - Row 39: COMMISSION \$
 - Row 40: BINS RATE PER BIN
 - Row 41: BOXES PICKED RING # HAULING
 - Row 42: NO. TREES PICKED TREE CLASS RENT MACHINE
 - Row 43: YIELD PER TREE TRUCK RENTAL
 - Row 44: LEMONS PER BOX
 - Row 45: TREE CLASS **TOTAL** \$

Notice that the formatting for various cells, including colors, borders and text alignment, are preserved in the resulting crew sheet. The program simply replaces the field names that it finds in the spreadsheet with the appropriate text.

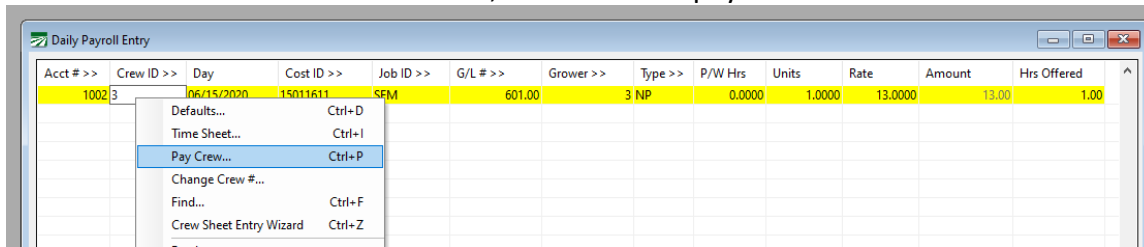
Daily Payroll Entry Methods

Pay Crew

The Pay Crew option can be used to automatically copy a daily payroll entry line to all employees assigned to the crew entered on the line.

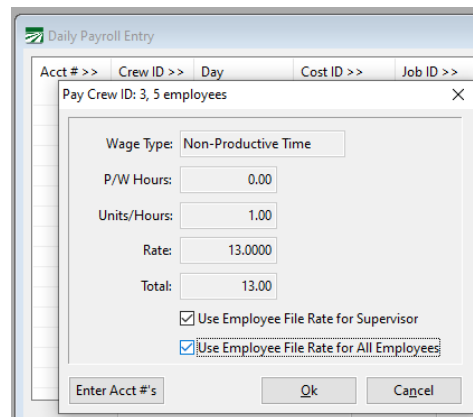
It can also be used as a shortcut to quickly employee account #'s to everyone on a time sheet, even if the crew is not pre-set.

To start, enter the first payroll line for the crew:



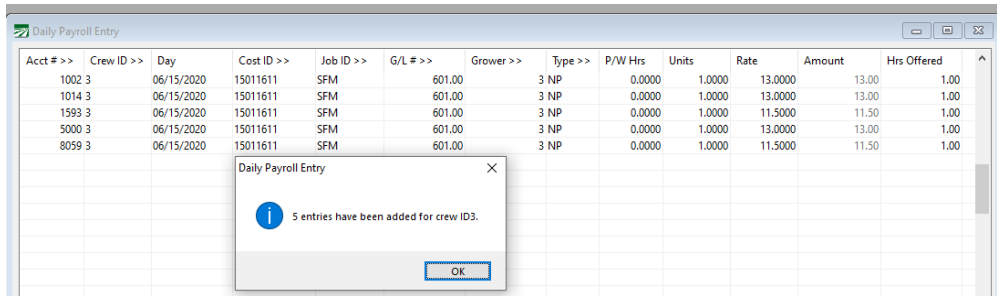
Right click on the entry you wish to copy. On the popup menu, select the Pay Crew option. A window will appear showing the crew number and the units/rate/amount that will be copied to each employee.

To pay a crew already established:



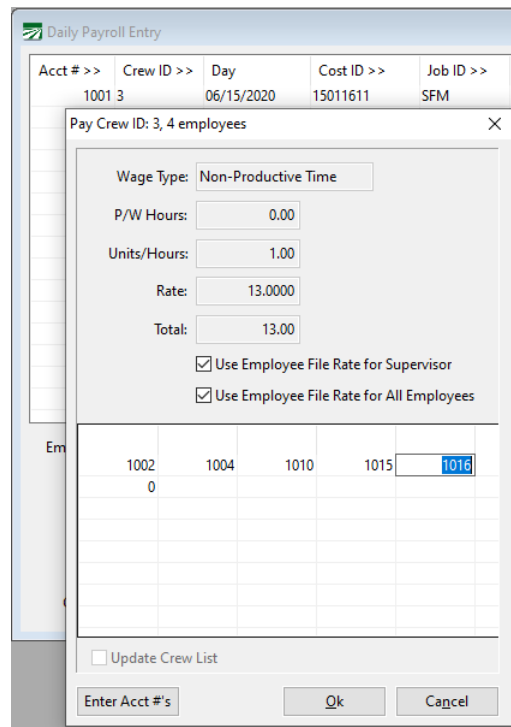
Select the Rates options as needed > Use Employee File Rate for Supervisor and/or User Employee File Rate for All Employees

Click on the Ok button to create the entries for everyone else assigned to the crew:



If there are any variations for any employees, you can of course edit the entries that are generated by the Pay Crew feature.

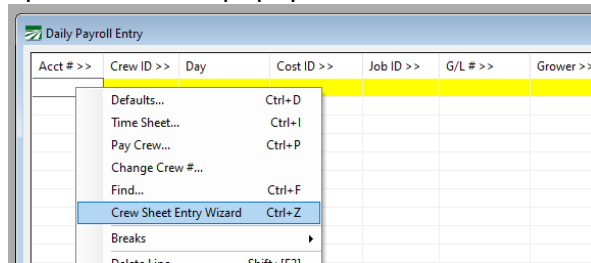
To use the Pay Crew option for a crew “on the fly”/where a crew is not established, click on the enter Account #'s on the Pay Crew pop-up:



If an employee # does not exist, you’ll get a message that the account # needs to be corrected. Once all account numbers are verified the entries will be created.

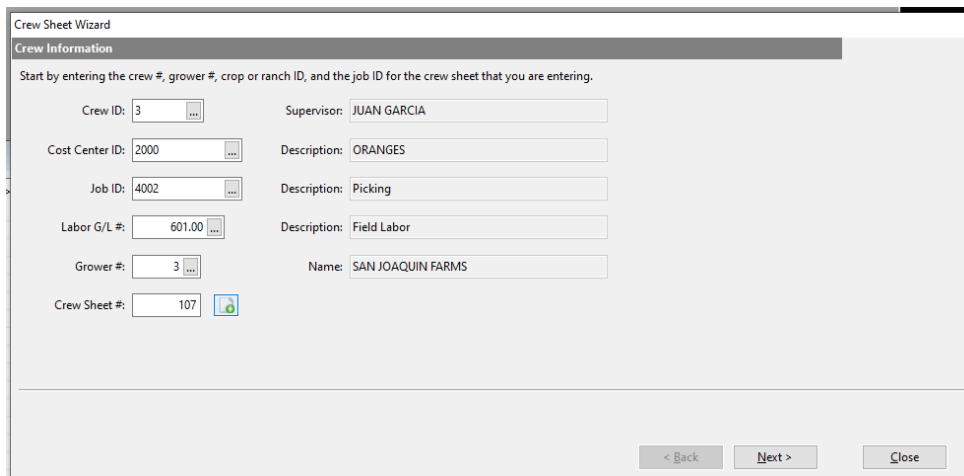
Crew Sheet Entry Wizard

The Crew Sheet Entry Wizard may be used to quickly enter time or pieces for an entire crew into the Daily Payroll file. This option is typically used in conjunction with the Crew Sheets printed by the software. To activate the wizard, press [Ctrl]+[Z] or select the option from the popup menu.



A new option was added last year to allow for you to enter Account #'s instead of populating the crew in alphabetic or account number order, so it now may be more useful for customers that can't utilize pre-set crews.

Step 1 – Enter the Crew Information, including Job, Crop/Cost ID & Grower:

A screenshot of the 'Crew Sheet Wizard' dialog box. The title bar reads 'Crew Sheet Wizard'. Below the title bar is a section titled 'Crew Information' with the instruction: 'Start by entering the crew #, grower #, crop or ranch ID, and the job ID for the crew sheet that you are entering.' The form contains several input fields: 'Crew ID:' with value '3', 'Supervisor:' with value 'JUAN GARCIA', 'Cost Center ID:' with value '2000', 'Description:' with value 'ORANGES', 'Job ID:' with value '4002', 'Description:' with value 'Picking', 'Labor G/L #:' with value '601.00', 'Description:' with value 'Field Labor', 'Grower #:' with value '3', and 'Name:' with value 'SAN JOAQUIN FARMS'. At the bottom, there is a 'Crew Sheet #' field with value '107' and a download icon. At the very bottom of the dialog are three buttons: '< Back', 'Next >', and 'Close'.

Step 2 – Select whether you are entering and Daily or Weekly Times Sheet and select the corresponding dates:

The screenshot shows the 'Crew Sheet Wizard' window at the 'Pay Period Dates' step. On the left, there are three sections: 'Select type of crew sheet...' with 'Weekly' selected, 'Pay Period Dates...' with 'Starting Date' as 06/15/2020 and 'Ending Date' as 6/21/2020, and 'Crew Sheet Date...' with a date field. On the right, there is explanatory text about weekly and daily crew sheets. At the bottom right, there are '< Back', 'Next >', and 'Close' buttons.

Crew Sheet Wizard
Pay Period Dates

Select type of crew sheet...

Weekly
 Daily

Pay Period Dates...

Starting Date: 06/15/2020
Ending Date: 6/21/2020

Crew Sheet Date...

Date: / /

There are two types of crew sheets, weekly and daily. A weekly crew sheet has time/pieces recorded for an entire week (or part of a week) for a single crew. A daily crew sheet has time/pieces for a single day in the pay period. The grid where you enter hours and pieces will be formatted according to the type of crew sheet you are using.

< Back Next > Close

Step 3 – Enter Wage Information

The screenshot shows the 'Crew Sheet Wizard' window at the 'Pay Type/Rate' step. It prompts the user to select pay type and rate. There are two main sections: one for 'Regular Hours' with Wage Type Code 'RH' and Pay Rate '13.5000', and another for 'Salary' with Wage Type Code 'SA' and Pay Rate '140.0000'. There are also several checkboxes for options like 'Use Pay Rates from Employee File' and 'Use a different pay type/rate for supervisor'. At the bottom right, there are '< Back', 'Next >', and 'Close' buttons.

Crew Sheet Wizard
Pay Type/Rate

Now select the pay type (usually regular hours or piecework) and the pay rate to use for the employees on this crew.

Wage Type Code: RH Wage Type: Regular Hours
Pay Rate: 13.5000

Use Pay Rates from Employee File
 Exclude Supervisor
 Display Pieces to 4 Decimal Places

Use a different pay type/rate for supervisor

Wage Type Code: SA Wage Type: Salary
Pay Rate: 140.0000

< Back Next > Close

When selecting BH – Base Hourly, you will also be prompted to enter the Hourly and Piece Rates. In addition, a second piece-rate can be entered. This may be helpful when there are rates for different pack styles or 2nd rate when they meet a production goal.

Crew Sheet Wizard

Pay Type/Rate

Now select the pay type (usually regular hours or piecework) and the pay rate to use for the employees on this crew.

Wage Type Code: ... Wage Type:

Hourly Pay Rate: Piece Rate #1: Rate #2:

Step 4 – Enter Defaults

This window will vary depending on which type of pay and pay cycle was selected.

This is an example of the defaults for Hourly / Weekly Crew Sheet:

Crew Sheet Wizard

Default Hours

Now enter the default hours for each day that employees worked.

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	
8.00	8.00	9.00	9.00	9.00	9.00	6.00	0.00

Apply Overtime Rules: ...

When Piecework is selected you can enter hour and piece defaults:

Crew Sheet Wizard

Default Hours

Now enter the default hours for each day that employees worked.

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	
8.00	8.00	9.00	9.00	9.00	9.00	6.00	0.00

Apply Overtime Rules:

And enter the default number of pieces for each employee on each day.

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	
90.00	90.00	100.00	100.00	50.00	0.00	0.00	

When using a Daily Time Sheet Your Default page will only have single entries. You can also specify break time at this point to save time from applying breaks after entries are created. This can also be helpful if you need to add additional heat break time on specific employees:

Crew Sheet Wizard

Default Hours

Now enter the default number of hours worked:

Regular Hours:

Overtime Hours:

Doubletime Hours:

of Pieces:

of Pieces #2: Overtime

Break Time:

Employee Loan:

Step 4 - Select the order employees were printed in on time sheets.

This is where the new option of custom appears:

Crew Sheet Wizard

Employee Order

What order are the employees listed in on the crew sheet?

Alphabetic

Account #

Custom

Check this box if other employees were added to the crew sheet by hand

If you are using crews from the software that were printed in Alphabetic or Account # order, you can select the respective option AND Check the box at the bottom if you need to add employees to the crew sheet.

To enter the Account #'s manually, click Custom.

You'll have one final review of totals and then when you click on Finish the Daily Payroll Lines are created:

Crew Sheet Wizard

Ready to Create Daily Payroll Entries

Click Finish to create entries in the Daily Payroll File.

Total Hours:

Total Pieces:

Total Hourly Wages:

Piecework Wages:

Salary Wages:

Break Hours:

< Back Finish Close

Daily Payroll Entry - Time Sheet #: 110

Acct # >>	Crew ID >>	Day	Cost ID >>	Job ID >>	G/L # >>	Grower >>	Type >>	P/W Hrs	Units	Rate	Amount	Hrs Offered
1002	3	06/22/2020	2000	4002	601.00		3 IP	0.0000	101.0000	0.0500	5.05	0.00
1002	3	06/22/2020	2000	4002	601.00		3 BH	0.0000	8.0000	13.0000	104.00	0.00
1004	3	06/22/2020	2000	4002	601.00		3 BH	0.0000	8.0000	13.0000	104.00	0.00
1004	3	06/22/2020	2000	4002	601.00		3 IP	0.0000	104.0000	0.0500	5.20	0.00
1006	3	06/22/2020	2000	4002	601.00		3 IP	0.0000	108.0000	0.0500	5.40	0.00
1006	3	06/22/2020	2000	4002	601.00		3 BH	0.0000	8.0000	13.0000	104.00	0.00
1009	3	06/22/2020	2000	4002	601.00		3 IP	0.0000	114.0000	0.0500	5.70	0.00
1009	3	06/22/2020	2000	4002	601.00		3 BH	0.0000	8.0000	13.0000	104.00	0.00
1014	3	06/22/2020	2000	4002	601.00		3 BH	0.0000	8.0000	13.0000	104.00	0.00
1014	3	06/22/2020	2000	4002	601.00		3 IP	0.0000	116.0000	0.0500	5.80	0.00
1016	3	06/22/2020	2000	4002	601.00		3 BH	0.0000	8.0000	13.0000	104.00	0.00
1016	3	06/22/2020	2000	4002	601.00		3 IP	0.0000	101.0000	0.0500	5.05	0.00

Employee: Rate: Reg/OT/DT Hrs: Total:

G/L: Pieces/Hours: Viewing:

Crop: Crew ID:

Job ID: Display Order:

Grower: Defaults

Assigning/Reusing Time Sheet #'s

When pre-printing crew sheets, an option is available to assign each sheet a Time Sheet #'s. The program records the time sheet # with the employees that were printed on the sheet at that point in time.

If a corresponding time sheet number is entered during the crew sheet entry wizard, the program will default the employee list to those employees.

When you use the auto-assign option in the crew sheet wizard, the same time sheet records are created when you add employees through the Custom Employee entry option.

You can use the same Time Sheet # on additional entries through the wizard to have those same employees auto-filled. For example, if the employees are generally the same within a crew for the week, you can enter the employees on the first day through the Custom option. The on sub-sequent days you can use the same time sheet # to auto-fill the employees in the wizard and add/delete as needed when editing that day.

Allocate Piecework Units

The Allocate Piecework Units is an entry option used when a crew splits one production total (Bins/Tons/Package count). The entries for a crew are pro-rated, so if an employee works different hours than others on a crew, the system adjusts the allocated piecework units.

To use the Allocate Piecework Units, you first enter all of the Hours for the employees. Use the PW Wage Type, but enter the Hours in the Units. This is how the program determines which lines need to be allocated.

Then, right click and select Allocate Piecework Units.

Enter the Total Piecework Units for the Crew and click OK.

The Adjust for Rounding will check to see if the pro-rated entries total the Piecework Units. In some cases a small adjustment is made to the pieces on one entry to adjust the final allocation to ensure it balances to the total piecework units entered.

Daily Payroll Entry - Time Sheet #: 110

Acct # >>	Crew ID >>	Day	Cost ID >>	Job ID >>	G/L # >>	Grower >>	Type >>	P/W Hrs	Units	Rate	Amount	Hrs Offered
1001 3		06/15/2020	DT101	PI		601.00	1 PW	0.0000	6.0000	1.1500	6.90	0.00
1002 3		06/15/2020	DT101	PI		601.00	1 PW	0.0000	6.0000	1.1500	6.90	0.00
1004 3		06/15/2020	DT101	PI		601.00	1 PW	0.0000	6.0000	1.1500	6.90	0.00
1006 3		06/15/2020	DT101	PI		601.00	1 PW	0.0000	6.0000	1.1500	6.90	0.00
1009 3		06/15/2020	DT101	PI		601.00	1 PW	0.0000	6.0000	1.1500	6.90	0.00
1014 3		06/15/2020	DT101	PI		601.00	1 PW	0.0000	6.0000	1.1500	6.90	0.00
1016 3		06/15/2020	DT101	PI		601.00	1 PW	0.0000	4.0000	1.1500	25.16	0.00

Employee: AVALOS, CARLOS GONZALEZ Rate: 0.00 Reg/OT/DT Hrs: Total: 66.56

G/L: Field Labor Pieces/Hours: Viewing: Crew ID: Display Order: Account # Defaults

Crop: BLOCK 101 Job ID: PICKING Grower: DATATECH

Allocate Piecework Units

Total Regular Hours: 57.88

Total Overtime Hours: 0.00

Total Piecework Units: 850.0000

Adjust for Rounding

Ok Cancel

In this example there was a total of 850 pieces and a combined total hours of 40. SO, the average pieces per hour was 21.25. The employee that worked 4 hours only received 85.00 Pieces while those that worked 6 received 127.5.

Daily Payroll Entry - Time Sheet #: 110

Acct # >>	Crew ID >>	Day	Cost ID >>	Job ID >>	G/L # >>	Grower >>	Type >>	P/W Hrs	Units	Rate	Amount	Hrs Offered
1001 3		06/15/2020	DT101	PI		601.00	1 PW	6.0000	127.5000	1.1500	146.63	0.00
1002 3		06/15/2020	DT101	PI		601.00	1 PW	6.0000	127.5000	1.1500	146.63	0.00
1004 3		06/15/2020	DT101	PI		601.00	1 PW	6.0000	127.5000	1.1500	146.63	0.00
1006 3		06/15/2020	DT101	PI		601.00	1 PW	6.0000	127.5000	1.1500	146.63	0.00
1009 3		06/15/2020	DT101	PI		601.00	1 PW	6.0000	127.5000	1.1500	146.63	0.00
1014 3		06/15/2020	DT101	PI		601.00	1 PW	6.0000	127.5000	1.1500	146.63	0.00
1016 3		06/15/2020	DT101	PI		601.00	1 PW	4.0000	85.0000	1.1500	97.75	0.00

Employee: AVALOS, CARLOS GONZALEZ Rate: 0.00 Reg/OT/DT Hrs: 0.00 0.00 0.00 Total: 977.53

G/L: Field Labor Pieces/Hours: 850.00 40.00 Viewing: Crew ID: Display Order: Account # Defaults

Crop: BLOCK 101 Job ID: PICKING Grower: DATATECH

Create Entries/Report

Once your entries are complete, you will use the Create Entries button to review the information and create the daily payroll entries.

Enter the Starting & Ending Time Sheet # range for the time sheets you want to review.

Report Type

Trial – Run the Trial to review the crew piecework totals.

Webinar Training Files Crew Piece Total Report									
Starting #: 15									
Ending #: 15									
Sheet#	#Empls	Pieces	Pieces/Empl	Total Piece \$	Hours	Hourly Rate	Hour\$	Total Wages	
15	5	220.000	44.000	209.00	3.25	0.000	0.00	209.00	
15	5	260.000	52.000	221.00	3.25	0.000	0.00	221.00	
15	5	180.000	36.000	135.00	3.25	0.000	0.00	135.00	
15	5	0.000	0.000	0.00	0.33	11.000	18.15	18.15	
SheetTotals				565.00			18.15	583.15	
Report Totals				565.00			18.15	583.15	

Proof Entries – Run the Proof Entries to see actual payroll entries that will be created.

Webinar Training Files Custom Batch Report									
Starting Sheet#: 15									
Ending Sheet#: 15									
Date Worked	Acct #	Employee Name	Crop ID	Job ID	Wage Type	Hours	Pieces	Rate	Amount
01/18/2017	1000	JUAN JOSE AYALA GARCIA	15-1	HA	PW	3.25	47.6667	0.95	45.28
01/18/2017	1000	JUAN JOSE AYALA GARCIA	15-2	HA	PW	3.25	52.0000	0.85	44.20
01/18/2017	1000	JUAN JOSE AYALA GARCIA	SJ15-3	HA	PW	3.25	36.0000	0.75	27.00
01/18/2017	1000	JUAN JOSE AYALA GARCIA	GL	BT	RR	0.33	0.0000	11.00	3.63
Total for Empl Acct # 1000 JUAN JOSE AYALA GARCIA						10.08	135.6667		120.11
01/18/2017	1001	MARIA REY AYALA GONZALES	15-1	HA	PW	2.00	29.3333	0.95	27.87
01/18/2017	1001	MARIA REY AYALA GONZALES	15-2	HA	PW	3.25	52.0000	0.85	44.20
01/18/2017	1001	MARIA REY AYALA GONZALES	SJ15-3	HA	PW	3.25	36.0000	0.75	27.00
01/18/2017	1001	MARIA REY AYALA GONZALES	GL	BT	RR	0.33	0.0000	11.00	3.63
Total for Empl Acct # 1001 MARIA REY AYALA GONZALES						8.83	117.3333		102.70
01/18/2017	6505	ROGELIO REYES	15-1	HA	PW	3.25	47.6667	0.95	45.28
01/18/2017	6505	ROGELIO REYES	15-2	HA	PW	3.25	52.0000	0.85	44.20
01/18/2017	6505	ROGELIO REYES	SJ15-3	HA	PW	3.25	36.0000	0.75	27.00
01/18/2017	6505	ROGELIO REYES	GL	BT	RR	0.33	0.0000	11.00	3.63
Total for Empl Acct # 6505 ROGELIO REYES						10.08	135.6667		120.11
01/18/2017	6972	JOSE JESUS LOPEZ	15-1	HA	PW	3.25	47.6667	0.95	45.28
01/18/2017	6972	JOSE JESUS LOPEZ	15-2	HA	PW	3.25	52.0000	0.85	44.20
01/18/2017	6972	JOSE JESUS LOPEZ	SJ15-3	HA	PW	3.25	36.0000	0.75	27.00
01/18/2017	6972	JOSE JESUS LOPEZ	GL	BT	RR	0.33	0.0000	11.00	3.63
Total for Empl Acct # 6972 JOSE JESUS LOPEZ						10.08	135.6667		120.11
01/18/2017	8059	GREGORIO DIAZ	15-1	HA	PW	3.25	47.6667	0.95	45.28
01/18/2017	8059	GREGORIO DIAZ	15-2	HA	PW	3.25	52.0000	0.85	44.20
01/18/2017	8059	GREGORIO DIAZ	SJ15-3	HA	PW	3.25	36.0000	0.75	27.00
01/18/2017	8059	GREGORIO DIAZ	GL	BT	RR	0.33	0.0000	11.00	3.63
Total for Empl Acct # 8059 GREGORIO DIAZ						10.08	135.6667		120.11
						49.15	660.0001		583.14

Ordering/Customize

The Ordering option allows you to change the order in which entries are printed and sub-totaled. For example, instead of printing by employee in the above example, you may elect to print by Cost Center/Crop ID and or Job to review your piecework totals by location or pack style.

The Customize option allows you to define the columns that appear on the report.

Final – Create Daily Payroll Entries

Entries can still be edited through Daily Payroll, however, you can't re-allocate if there were mistakes in the crew totals. You can delete entries by time sheet and enter them again.

Create Rest & Recovery/Breaks

For California operations a helpful page for Rest & Recovery information is the D.I.R.'s FAQ page:

https://www.dir.ca.gov/pieceratebackpayelection/AB_1513_FAQs.htm

Washington Rest Break policies can be found at:

<https://lni.wa.gov/workers-rights/docs/esc6.2.pdf>

When to create Rest & Recovery (R&R)/Breaks

The R&R entries can be created at different points during the payroll entry process:

- 1) When all entries have been completed.

The simplest method for creating breaks is when all payroll entries have been entered and reviewed.

When using the Add/Update Breaks option you can select to create entries for **All Entries in Pay Period**.

Add/Update Breaks

Add Breaks to...

Currently Displayed Entries

All Entries in Pay Period

Starting Date: 06/15/2020

Ending Date: 06/21/2020

Operator:

Crew ID:

State:

Extract break time from employees that only have hourly wages

Extract break time from hourly wages

Ok Cancel

- 2) By Time Sheet/Display Entries

In some situations you may want to create breaks by time sheet/batch of entries. For example, a farm labor contractor may have employees move between different growers/fields in a day. To accurately bill each client, they may want to create breaks separately for the morning break from another location where they took their afternoon break.

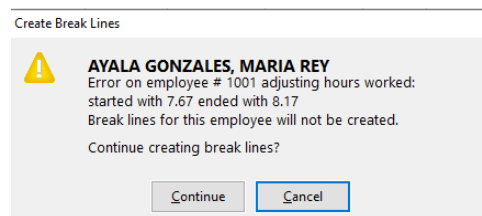
As long as you have the Daily Payroll window filtered to a Time Sheet #, Crew or Entry Operator, you can use the option to **Add Breaks to Currently Displayed Entries**.

If you have created breaks for only certain batches of payroll, you can then use the Add/Update Breaks for all entries when your payroll entry is completed. If the program sees there are already break entries on a specific day, it will not duplicate those breaks. It will only add breaks for other days as needed.

Changing break time on entries already created.

If you have already created breaks and want to change the amount of break time paid, the program does not handle using the Add/Update Breaks to adjust the hours.

For example, I recently had a new customer that applied 20 minutes of breaks to some entries. They decided they wanted to pay for 15 minute breaks each for a total of ½ time. When they tried to update the breaks, this message appeared:



That is because the program does not currently handle calculation and only added the difference in amounts.

In this case, the options are to use the Search & Replace to modify the P/W Hours and Break Time. Or, use the Filter to delete the R&R entries, edit the P/W Hours and re-create the breaks.

Options for Creating Breaks on Hourly Days

On the Add/Update Breaks window there are two options for whether breaks are created on hourly days:

- 1) Extract break time from employees that only have hourly wages

This setting is optional and only needs to be selected if you want to create break entries for employees that have **no piecework**/only hourly wages. This option was requested by a customer that wanted to standardize the payroll and apply breaks for all time, even when there is only hourly pay.

- 2) Extract break time from hourly wages

This option will default to be check-marked for California operations, as California rules dictate breaks must be paid at the Regular Rate of Pay, even on hourly days, if there is any piecework in the pay period.

For Washington this option will be unchecked, as you don't have to create/pay breaks separate on hourly days.

When you operate in multiple states, you may need to verify this setting, depending on which state you are preparing payroll for.

Overtime

A handy chart with the California Overtime phase-in thresholds is available in a Datatech Support blog post at <https://datatechag.com/2020-california-ag-overtime-laws/>

As Datatech is in California, we are more familiar with its overtime rules. Many other states exempt field workers from overtime pay, however you may have packing houses or other operations where overtime rules apply. Always refer to your states guidelines for overtime rules and calculation methods.

The Overtime Rules within the software are not automatically updated. As the rules will still be changing the next few years, you'll need to review and adjust the Overtime Rules setup under Payroll > Setup > Overtime Rules.

Applying Overtime Hourly vs. Piecework

When there are more than 2 rates on any payroll check, state and federal rules dictate to calculated overtime using a “weighted average” or regular rate of pay method.

A good example of this can be found in the DIR AB 1513 FAQ link cited above in the R&R section. In example 4, you'll see how the regular rate of pay is calculated and the rate that breaks are paid. Since the employee has already received the “straight” time compensation in the piecework wages, ½ the average hourly rate is added on, as a premium, for the additional ½ time pay.

4. For a workweek of piece-rate compensation and overtime hours:

- An employee works a 6-day, 47-hour workweek, for which 7 hours constitute overtime.
- The employee has two 10-minute rest periods authorized and permitted per day, for a total of 120 minutes (2.0 hours) of rest periods for the workweek.
- The employee earns a total of \$800 in piece-rate compensation for the workweek.

The average hourly rate to be paid for the rest periods for this employee is calculated as follows:	
\$800	Total compensation for the workweek, not including compensation for the rest and recovery periods or premium pay for overtime.
÷ 45 hours	Total hours, not including the rest and recovery periods.
= \$17.78/hour x 2.0 hours = \$35.56	Compensation for rest and recovery periods for this workweek.
The overtime premium compensation for this employee is:	
\$800	Piece-rate compensation
+ \$35.56	Compensation for rest and recovery periods
= \$835.56	
÷ 47 hours	
= 17.78/hour	Regular rate of pay
x .5	
= \$8.89	Premium pay due for overtime hours
x 7 hours	Overtime hours
= \$62.23	
Total compensation for the workweek:	
\$800	Piece-rate compensation
+ \$35.56	Compensation for rest and recovery periods
+ \$62.23	Premium pay for overtime hours
= \$897.79	

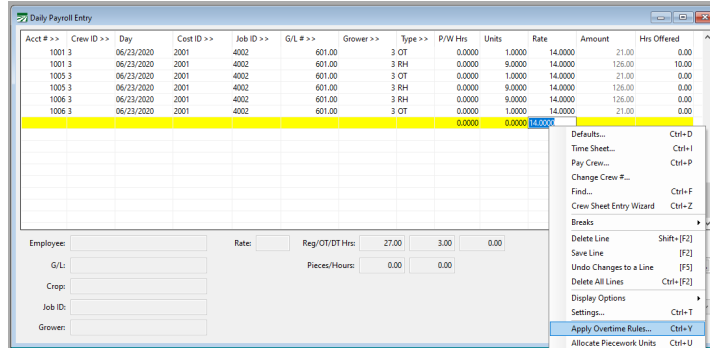
4. Para una semana laboral de pago por pieza y horas extras:

- Un empleado cumple una semana laboral de 6 días, 47 horas, para los cuales 7 horas constituyen horas extras.
- El empleado tiene dos períodos de descanso de 10 minutos autorizados y permitidos por día, por un total de 120 minutos (2.0 horas) de período de descanso para la semana laboral.
- El empleado gana un total de \$800 en pago por pieza por la semana laboral.

La tarifa promedio por hora que se le debe pagar al empleado por los períodos de descanso se calcula de la siguiente manera:	
\$800	Remuneración total por la semana laboral, sin incluir la remuneración por los períodos de descanso y de recuperación o el pago de horas extras
÷ 45 horas	Horas totales sin incluir los períodos de descanso y de recuperación
= \$17.78/horas x 2.0 horas = \$35.56	Remuneración por los períodos de descanso y de recuperación por la semana laboral
El pago de primas por horas extras para el empleado es:	
+ \$800	Remuneración de pago por pieza
+ \$35.56	Remuneración por períodos de descanso y de recuperación
= \$835.56	
÷ 47 horas	
= 17.78/hora	Tarifa regular de pago
x .5	
= \$8.89	Pago de primas adeudado por horas extras
x 7 horas	Horas extras
= \$62.23	
Compensación total por la semana laboral	
\$800	Remuneración de pago por pieza
+ \$35.56	Remuneración por los períodos de descanso
+ \$62.23	Pago de primas por horas extras
= \$897.79	

Hourly Overtime

When you only have Hourly Overtime, you can enter the total amount of hours when entering Daily Payroll. Then right click and select Apply Overtime Rules:



Select the Rule to Apply:

The screenshot shows the 'Daily Payroll Entry' window with the payroll data table. The first row is highlighted in yellow, indicating it is selected. The table data is as follows:

Acct # >>	Crew ID >>	Day	Cost ID >>	Job ID >>	G/L # >>	Grower >>	Type >>	P/W Hrs	Units	Rate	Amount	Hrs Offered
1001 3	06/23/2020	2001	4002	601.00	3	OT	0.0000	1.0000	14.0000	21.00	0.00	
1001 3	06/23/2020	2001	4002	601.00	3	RH	0.0000	9.0000	14.0000	126.00	10.00	
1005 3	06/23/2020	2001	4002	601.00	3	OT	0.0000	1.0000	14.0000	21.00	0.00	
1005 3	06/23/2020	2001	4002	601.00	3	RH	0.0000	9.0000	14.0000	126.00	0.00	
1006 3	06/23/2020	2001	4002	601.00	3	RH	0.0000	9.0000	14.0000	126.00	0.00	
1006 3	06/23/2020	2001	4002	601.00	3	OT	0.0000	1.0000	14.0000	21.00	0.00	

The software will subtract the overtime hours from the RH line and create a separate OT line.

Piecework Overtime

Piecework Overtime is calculated when you run the Daily Payroll Batch Report.

Acct # >>	Crew ID >>	Day	Cost ID >>	Job ID >>	G/L # >>	Grower >>	Type >>	P/W Hrs	Units	Rate	Amount	Hrs Offered
1001	3	06/15/2020	2001	BT	601.00	3	RR	0.0000	0.3300	19.6300	6.48	0.33
1001	3	06/15/2020	2001	PI	601.00	3	PW	9.1700	4.0000	45.0000	180.00	9.50

In this example the employee worked 9 ½ hours of piecework and break time. The Regular Rate of Pay is 19.6295 (rounded to 19.63).

When the Daily Payroll Batch Report adds on the Overtime Premium a line will be added with .5 units (this does not count as additional hours) and a rate of 9.82 (19.6295 / 2 = 9.8147):

Webinar Training Files
Daily Payroll Batch Report

Starting Date: 06/15/2020
Ending Date: 06/21/2020

Acct #/Employee Name	Reg	Wages	Excess		Check Total	SDI	Fed Wht	Soc Sec	Loans	Account #
			Overtime	Units			State Wht	Medicare	Misc Ded	Net Check
1001 AYALA GONZALES MARIA REY		186.48	4.91		191.39	1.91	0.00	11.87	0.00	122.39
Day G/L # Job ID Crop	Grow	Type	PW Hr	Units	Rate	Total	Cr. ID			
15 601.00 BT 2001	3	RR	0.00	0.3300	19.6300	6.48	3	0.00	2.77	52.45
15 601.00 PI 2001	3	PW	9.17	4.0000	45.0000	180.00	3		Child Support	52.45
15 601.00 PI 2001	3	OP	0.00	0.5000	9.8200	4.91	3			
Days Worked: 1		Totals:	9.17	0.3300 Hrs		191.39				
				4.0000 Pieces						

Keep in mind that with the weekly overtime rule in place, the software will also adjust overtime premium if the employee crosses the weekly overtime limit, even if they have not passed a daily overtime limit.

This is also a reason to reconsider creating checks by crew, if you currently do so. For example, an employee that worked 6 days @ 9 hours a day, on different crews, could fall under the overtime limit if the checks are created separately. 6 days @ 9 hours = 54 hours, which means 4 hours need to be counted to Overtime Premium.

Recalculating & Making Corrections in Check Entry

When checks have been issued incorrectly there are several ways to make corrections to checks

- 1) If the employee has not cashed the check, the best way to make corrections is to use the Void & Re-Issue option to re-create the check in the Batch Check Entry.

Once you have corrected any missing/overpaid pieces and/or hours, use the Recalculate R&R Rate option on the breaks button to re-calculate break rates.

If you have Overtime Premium, in most cases, the rates should be updated to $\frac{1}{2}$ the R&R rate.

Or, you can use the Undo Create

- 2) If the employee has already cashed the checked, options to re-calculate the difference include:
 - a. Re-enter the entire check as it should have been paid and calculate the R&R and Overtime Premium if needed. Then, enter one adjustment line with a negative total for the wages already paid on the original check. This will issue the employee the difference in wages they are due.
 - b. Manually add the missing wages to the prior wages to calculate the corrected R&R rate. Enter a new check with:
 - i. The missing piecework/hourly pay
 - ii. Pay adjustment for the breaks hours at the difference between the paid break rate and the corrected break rate.

Submitted Questions

Our pay cycle is bi-weekly and we are entering checks through the Batch Payroll Check window. When Breaks are added is there a way to only apply breaks to the week in which they worked piecework and is this permissible by law?

We could not find anything in the DIR's documentation that addresses bi-weekly. There is a section regarding semi-monthly that discusses a "true-up" compensation made on the following pay period once they have all compensation for a work week to calculate the R&R rate for that week, so it seems it is permissible to only pay breaks that work week. We recommend you verify this with a labor law consultant or attorney.

At this time, if you only need to calculate R&R for a workweek with piecework, you could enter that week's hours first, add breaks and then add the second week's wages.

If the piecework came in the second week and you already have the first week entered in the batch, another option may be to use the Daily Payroll for the second week.

Enter the second week entries in Daily Payroll > Add Breaks > then use the Daily Payroll Report/Create Checks process to move those entries to the Check file. This will add those entries to the existing check.

I will review this situation with the programmers and see if there are any other programming modifications we could make to only create breaks for a workweek within a bi-weekly pay cycle.

Is there a way to apply OT rules in Batch Payroll Check entry?

No, the Check Entry window does not have the overtime rules application functions.

You may want to start enter your payroll through the Daily Payroll to utilize these functions. When you enter daily payroll by employee, you can use the Default setting under Date > Increment Date for Same Employee. This way the program will automatically update the date on consecutive lines for the same employee.

If I have R&R and Overtime Premium, want to use the reports to update rates/create OP entries instead of using the Daily Payroll Batch Report, which order do I run the reports in?

Run and update the Rest & Recovery Report first. This will adjust the rates that are needed in the Overtime Premium Report calculations.

Note, however, that if you use the Daily Payroll Batch Report, the report will make both calculations at the same time and the running of the reports separately is not required.

If we have a crew that is working for a grower that is deducting Union dues and they've also worked with another grower one day how can I separate the union dues with that particular day they worked for a different grower?

- 1) In the Grower entry, mark the Union box on growers that require union deductions.
- 2) Employee should be set up with the Union deduction with the Method "Percent of Union Wages" and respective %.
- 3) After Creating Checks use the Calculate Union Deductions on the Checks menu to calculate the deductions based on the wages for the growers that are set to Union.

Do you have a tab for Non-Productive time like Rest & Recovery?

Not at this time, but the request has been reported to our programming dept.

The quickest way of entering NP time when you don't have a pre-set crew, is to use the Pay Crew > Enter Account #'s tool or the Crew Sheet Entry Wizard > Custom Employee Ordering.

Can you use this option (Add/Update Breaks) if you import data using excel and add just the breaks for the crew or just one employee?

Yes, there is already an option on the Add/Update Breaks to create for All Entries in the Pay Period and then you can select/assign a crew.

To create breaks for one employee, click on a line in the Daily Payroll for that employee, in the Account # field. Press the Ctrl key and = key to apply a filter to just that employees entries. Then, use the option on Add/Update Breaks to Apply to the Currently Displayed Entries.

How can I Add all the breaks if I use weekly entries (totals)?

This can be tricky and you may need to do some extra verification of the payroll and Break Time Setup to make sure all breaks are paid.

Depending on how many hours the employees worked each day, total the amount of break hours you want the system to apply.

For example, if the employees worked 8-9 hours each day, you can estimate that an employee that worked 24 – 31 hours, worked 3 days and therefor needs 6 paid breaks. An employee with 32 – 39 hours would have worked 4 days and need 8 breaks. An employee with 40 – 49 hours worked 5 days and is due 10 breaks.

You can then adjust the Break Time Table accordingly.

However, if the employees days were not consistent you may need to adjust the entries after the breaks are created.