

# Shiftboard

## Overtime Equalization

### Key Benefits

Overtime equalization is one of the most critical aspects of workforce scheduling. Eliminating errors and favoritism in overtime distribution is vital to preventing compliance issues, improving employee morale, and ensuring workforce productivity. Powered by one of the most advanced rule engines, Shiftboard enables fair, seamless, and evidence-based overtime balancing so that you can:

#### Comply with Internal Policies and Union Agreements

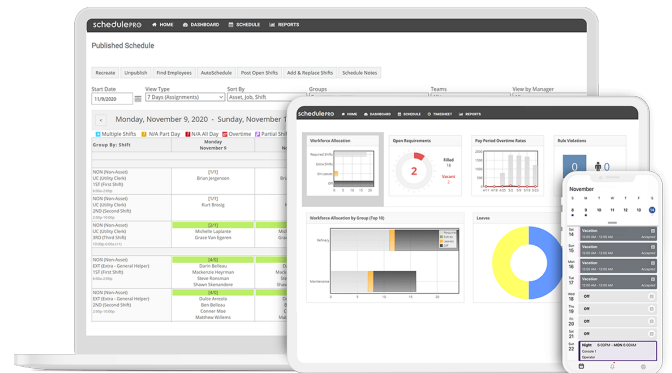
Reduce scheduling errors, grievances, and penalties associated with wrongful overtime assignments.

#### Keep Your Workforce Happy with Fair Schedules

Automate a standardized and transparent scheduling process to provide everyone equal access to overtime.

#### Ensure Employee Productivity

Prevent burnout and fatigue risks due to uneven overtime hours distribution.



### Capabilities

#### Matches Your Overtime Detection, Counting, and Tracking Methods

Overtime distribution begins with data you can trust. Shiftboard alleviates the manual work required to maintain employee data and work stats and ensures the use of timely and accurate information in scheduling decisions.

- Detects which overtime hours and multipliers to apply for adherence with complex site policies.
- Tracks and applies overtime refusal charges to employees automatically.
- Exempts employees from overtime and refusal penalties when appropriate.
- Updates employee work stats upon schedule changes and timesheet approvals.

## Prioritizes Employees for Overtime Based on Your Policy

Managing complex overtime rules and processes is time-consuming and error-prone. Highly configurable, Shiftboard automatically assigns overtime to employees in the order specified in your overtime equalization policy. Our wide range of employee sorting methods includes:

- Overtime hours balance
- Overtime refusal hours balance
- Last date overtime worked or refused
- Company, plant, unit seniority
- Year-to-date work hours
- Pay period work hours
- Job classifications
- Pre-defined employee rotation order
- Other custom methods

Employee	Pay Period Hours	YTD Total	OT	Refusal	
TRUDA BOTEAD (FLT   EXTR   F/T) PTS 66	84.00/unlim.	864.00	360.00	Add	Assign Overtime ⓘ
ROBINA GORS (FIN   EXTR   F/T) PTS 0	84.00/unlim.	887.00	556.50	Add	Assign Overtime ⓘ
LAW GRAYER (SU   EXTR   F/T) PTS 0	84.00/unlim.	876.00	558.00	Add	Assign Overtime ⓘ
JUDE HULSTROM (FIN   EXTR   F/T) PTS 288	84.00/unlim.	876.00	558.00	Add	Assign Overtime ⓘ

## Tracks Overtime Decisions for Scheduling Transparency

The key to building a fair and trusting workplace is helping staff understand your scheduling process and having sound evidence to support overtime decisions. Shiftboard’s robust auditing tools empower you to address inquiries and back up decisions with ease and confidence.

- Offers a comprehensive audit trail of the schedule history to diagnose issues and resolve disputes.
- Evaluates and identifies any eligible employees overlooked for overtime shifts.
- Generates real-time insights for trends analysis on overtime distribution among employees.
- Allows employees online access to view their work stats and priority standing for overtime.

The screenshot displays the 'Activity Log' for a shift update on 9/25/2021. The interface includes a calendar view on the left, a central activity log window, and a right-hand panel showing shift details and a 'Paid Hours 8.00' gauge.

**Activity Log: 9/25/2021**

Action: Update  
 Affected Employee: Dylan Brault  
 Affected Date: 9/25/2021  
 Created By: EDP Administrator  
 Created Date: 9/14/2021 3:44:24 PM

Field	Before	After
Shift Code	-	3RD
Start Time	9/25/2021 12:00:00 AM	9/25/2021 10:00:00 PM
End Time	9/26/2021 12:00:00 AM	9/26/2021 6:00:00 AM
Total Overtime Hours	0.00	12.0
Overtime Hours	0.00	8
Shift Date	9/25/2021 12:00:00 AM	9/25/2021 12:00:00 AM
Asset Code	1413	1413
Job Code	OP	OP

**ADDITIONAL INFORMATION**

Schedule is updated

Close

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