

The employee overtime audit template is designed to help you identify the trends and issues that may arise with overtime at your organization. Sometimes overtime is necessary to reach goals and it is wanted, other times it becomes a burden that leads to excessive costs and employee burnout.

At what point will adding a new position be more cost efficient and beneficial to all? While there is no set metric to determine that, this template can identify which jobs and departments may need to be reviewed further.

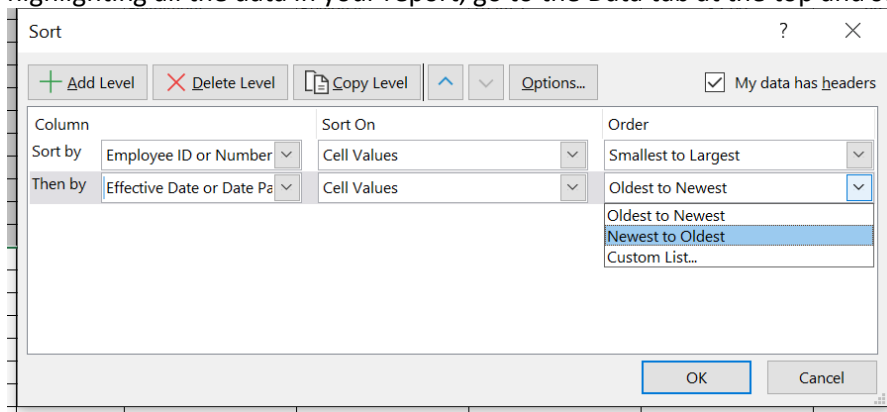
The templates are color coded with this setup:

- **Green Cells** – Enter your information
- **Grey Cells** – Contains formulas that will calculate based on the information entered in the green cells
- **No color** – You can enter information in these cells, but they won't affect any formulas.

Step 1 – Review your organizations overtime earnings reports. You should be able to get a detailed report that lists out overtime paid per employee ID, depending on your payroll provider and systems.

- If your overtime report has each employee listed 1x with their annual total overtime in 1 row, skip the below step and go to step 2.
- If your overtime report includes multiple rows of data per employee ID:

Be sure to sort the file by employee ID and the most recent effective date per employee ID. While highlighting all the data in your report, go to the Data tab at the top and select Sort. Then select:



In the case the employee had a title, department or hourly rate change, the detailed summary page will pull in the first record only (so sort with most recent data at the top, unless you want the older position showing up in the summary).

The Detailed Summary page will summarize your overtime data into totals with 1 row per employee with their grand total overtime amounts, after step 2 is completed.

Step 2 – Paste the overtime data into the OT Earnings Detail page. Make sure to line up the columns so they match the template, or paste each column into the template, just below the template headers.

If you only have the hourly rate, the file will calculate an annual rate as 2080 the hourly rate. If you have a different annual salary, you can copy that over the 2080 formula.

DIRECTIONS FOR OVERTIME AUDIT WORKSHEET

Step 3 – On the ‘Enter Ranges’ page: In this page you can enter the Overtime Percentages that you want your summary to group and show counts of how many employees are falling into each category:

Overtime Percentage of Base Pay Ranges

From	To	OT % of Base
0.0%	0.0%	none
0.1%	9.9%	0.10% to 9.90%
10.0%	20.0%	10.00% to 20.00%
20.0%	39.9%	20.00% to 39.90%
40.0%	59.9%	40.00% to 59.90%
60.0%	100.0%	60.00% to 100.00%
		0.00% to 0.00%
		0.00% to 0.00%

For example, employee #3 has \$20k in overtime and 64k annual base pay. The percentage of overtime earnings will be their overtime divided by their base pay, which comes to 31% for employee #3. He will be counted in the Overtime Category range of 20% - 39%:

Employee	Employee Name	Total Overtime Earnings	Current Hourly Rate	Current Annual Salary	Overtime as a % of Base Pay	Overtime % of Base Pay - Ranges	Date of Hire
1	Name 5	700.00	25.00	52,000.00	1.35%	0.10% to 9.90%	5/1/2019
2	Name 7	600.00	28.00	58,240.00	1.03%	0.10% to 9.90%	5/1/2019
3	Name 10	20,200.00	31.00	64,480.00	31.33%	20.00% to 39.90%	5/1/2019
4	Name 12	200.00	32.00	66,560.00	0.30%	0.10% to 9.90%	1/1/2012
5	Name 13	900.00	34.00	70,720.00	1.27%	0.10% to 9.90%	5/1/2019

Note: this percentage is calculated based on the total overtime compared to their annual base salary. If you don't have a full year's worth of overtime data, the percentages will be lower. If you are reviewing 1 quarter, or 1 month at a time, you could update the Current Salary in the OT Earnings detail page, so it's reflecting of their base pay during the specified time period.

Step 4 – Click Refresh All – this is what will update your information on the following 3 summary pages. Anytime new data is added to the OT Earnings Detail page, be sure to click the Refresh All button:

The screenshot shows the Microsoft Excel interface with the 'Data' tab selected. The 'Refresh All' button in the 'Queries & Connections' group is circled in blue. Below the ribbon, three summary tables are displayed:

Title	Sum of Overtime Earnings	Sum of Current Salary	Average % OT of Base
(blank)	0	0	#DIV/0!
HR Specialist	650	126,880	0.51%
HR Manager	350	131,040	0.27%
Accountant	1,000	139,360	0.72%
Finance Specialist	1,250	220,480	0.57%
Finance Manager	10,450	224,640	4.65%
Operations Manager	20,200	126,880	15.92%
Specialist	1,100	278,720	0.39%
Grand Total	35,000	1,248,000	2.80%

Department	Sum of Overtime Earnings	Sum of Current Salary	Average % OT of Base
Finance	12,700	584,480	2.17%
Fulfillment	1,100	278,720	0.39%
HR	1,000	257,920	0.39%
Operations	20,200	126,880	15.92%
(blank)	0	0	#DIV/0!
Grand Total	35,000	1,248,000	2.80%

Functional Area	Sum of Overtime Earnings	Sum of Current Salary	Average % OT of Base
Region 1	2,450.00	341,120.00	0.72%
Region 2	20,550.00	266,240.00	7.72%
Region 3	750.00	274,560.00	0.27%
Region 4	10,450.00	282,880.00	3.69%
(blank)	800.00	83,200.00	0.96%
Grand Total	35,000.00	1,248,000.00	2.80%

Step 5: Review the 3 pages of summary data & adjust percentage ranges if needed

Job Title Overtime Totals

Title	Overtime Earnings	Sum of Current Salary	Average % OT of Base
(blank)		0	#Div/0!
HR Specialist	650	126,880	0.51%
HR Manager	350	131,040	0.27%
Accountant	1,000	139,360	0.72%
Finance Specialist	1,250	220,480	0.57%
Finance Manager	10,450	224,640	4.65%
Operations Manager	20,200	126,880	15.92%
Specialist	1,100	278,720	0.39%
Grand Total	35,000	1,248,000	2.80%

Department Overtime Totals

Department	Sum of Overtime Earnings	Sum of Current Salary	Average % OT of Base
Finance	12,700	584,480	2.17%
Fulfillment	1,100	278,720	0.39%
HR	1,000	257,920	0.39%
Operations	20,200	126,880	15.92%
(blank)	0		#Div/0!
Grand Total	35,000	1,248,000	2.80%

Overtime by Region

Overtime % of Base	Headcount	Total Overtime Earnings
= 0	1	800
0.10% to 9.90%	1	800
= Region 1	2	1,600
0.10% to 9.90%	2	1,600
= Region 2	2	31,500
10.00% to 20.00%	1	11,300
20.00% to 39.90%	1	20,200
= Region 3	1	600
0.10% to 9.90%	1	600
= Region 4	2	500
0.10% to 9.90%	2	500
Grand Total	8	35,000

Overtime by Team

Overtime % of Base	Headcount	Total Overtime Earnings
= 0	1	800
0.10% to 9.90%	1	800
= Team 1	1	700
0.10% to 9.90%	1	700
= Team 2	2	11,500
0.10% to 9.90%	1	200
10.00% to 20.00%	1	11,300
= Team 3	4	22,000
0.10% to 9.90%	3	1,800
20.00% to 39.90%	1	20,200
Grand Total	8	35,000

Tip: Sort to see a listing of the employees with the most overtime first.

If you had multiple rows per employee ID, you can review the grand totals per employee ID in the Detailed Summary page. Sort any column by highlighting all data, and then going to the Data tab at the top and selecting the Sort button.

For more information on how to best use your template and free spreadsheet tips, checkout these resources:

<https://timesavingtemplates.com/get-started-excel/>

<https://timesavingtemplates.com/freeresources/>