

## **TIME & BILLING POLICY**

### **Purpose**

Pierce Washington's requires all full time personnel to work a minimum of 40 hours per week and to record their time accurately for purposes of billing clients, managing our business, and processing payroll. Pierce Washington also recognizes the employee need for time away from work and strives to create a flexible work environment that balances the needs of our employees, our customers, and the company through telecommuting and paid time off (PTO). The purpose of this policy is to outline the parameters for time reporting, telecommuting and paid time off.

### **Scope**

This policy applies to all salaried employees and partners (collectively, "employees") of Pierce Washington.

## **Time and Billing Policy**

### **Use of Projector**

Pierce Washington uses Projector, an online time and billing system, to track all projects and employee hours. All employees are required to use Projector to enter time for project staffing, payroll and billing purposes. Hours should be entered into Projector by 9am on Monday for the prior week's work. In addition, all hours should be also be entered by the first day of each month for any hours that have not yet been recorded (ie when the first day of the month falls on a day other than Monday).

### **Time Entry and Billing Guidelines**

Employees are required to work a minimum of 40 hours per week. All time worked must be entered into Projector. It is not mandatory that all of the hours entered will be billable time. Non-billable internal project time and unassigned time should also be entered into Projector. All time must be entered in the following categories:

#### ***Project Specific***

Client project tasks are the primary categories used by employees. All client billable time that an employee works should be recorded against the corresponding client project and task code. For questions regarding which tasks to use within a client project, please contact your project manager

#### ***Internal Activities***

This category includes hours for work on internal projects and company development activities, including work on committees, work on internal Pierce Washington projects, mentoring, knowledge sharing, performance review preparation and delivery, developing training material, company meetings and other assigned internal activities.

#### ***Pre-Sales Activities***

This category includes hours for all Pierce Washington presales, business development, and non-billable client activities (except travel).

#### ***Training***

This category includes hours for all Pierce Washington training, including attendance at Brown Bag sessions and both formal and informal training

#### ***Travel***

This category includes hours for all Pierce Washington non-billable travel (including non-billable client travel).

### **Unassigned Time**

This category is to be used for unassigned, non-billable time, that does not fall into one of the other categories listed, including completing administrative tasks, completing open enrollment or human resources activities, time off for voting and hours used to reach the 40-hour per week reporting minimum.

### **Time Off**

This category is to be used for Time Off from work, including Paid Time Off, Jury Duty, and Unpaid Time Off.

### **General Administration**

This category includes hours for department activities for Department Heads and Partners.

## **Work from Home Policy**

While Pierce Washington supports opportunities to work from home, any work from home requests should be communicated via email directly to Regional Director and Project Manager. . These requests should be made at least one day in advance and are subject to approval. Once approved, employees must update their Outlook calendar to reflect that the employee is working remotely, notify individuals that the employee will be working remotely and indicate the best way to communicate (phone, Skype, email, etc.). Employees who are telecommuting will be treated like any other employee who is on site and must be available and reachable by email and telephone.

Pierce Washington strives for a positive, flexible work environment and generally approves periodic requests to work remotely. However, we also benefit a great deal from the knowledge sharing gained when everyone is in the office working together. The above guidelines will help us strike the right balance between the two.

## **PTO Policy**

Regardless of length of company service, all employees are eligible for and will accrue PTO time. There is no waiting period before you may utilize PTO. Usage and scheduling of time off is subject to the direction and written approval of your manager.

### **PTO Guidelines**

- PTO hours can be used for any reason, including vacation, illness, doctor's appointments or personal business.
- Employees must obtain approval via email from their Regional Director and Manager/Project Managers, prior to taking PTO.
- Employees are responsible for reporting PTO hours as soon as possible. The system allows PTO to be recorded either before or after PTO is taken.
- Managers are responsible for ensuring that employees have accurately reported PTO.
- PTO can be taken in partial day increments if requested by the employee and agreed to with management.
- If the time away from the workplace will amount to less than 4 hours, the employee may choose to make up this time in the course of the business week and not use PTO. However, the employee's manager must still be notified of the time away from work via email so alternative arrangements can be made to cover that employee, if necessary.

#### **Accrual**

Paid PTO days are accrued with each bi-monthly payroll period on a prorated basis at a rate of 1/24th of the employee's annual PTO eligibility.

The maximum amount of accrued PTO hours is up to a maximum cap of 30 paid PTO days. No additional paid PTO will be earned above the 30 days, until the PTO balance is below the allowed maximum amount.

Employees and managers are responsible for monitoring PTO balance to ensure appropriate PTO usage and accurate reporting.

#### **Employment Status Change Effects on PTO**

##### **Termination**

In the event of termination, the value of unused PTO balance (PTO accrued less PTO taken) will be paid in full.

##### **Leave of Absence**

In the event of a Leave of Absence, including short-term disability for California employees, the employee must use accrued PTO hours.

PTO does not accrue while an employee is on a Leave of Absence.

##### **Request for Leave**

Employee must request the leave from management, in advance, whenever possible. The written request must indicate the reason for the leave and the length of time. Advance requests for leaves with documentation supporting the leave will be given priority status in determining leave time available and approval. Any leave of absence that extends beyond the PTO the employee has saved is at Management's discretion.

Additionally, Pierce Washington reserves the right to restrict leaves or the duration of a leave if the leave will cause a major impact on business or any departmental operation. In emergency circumstances, an employee may submit a request for leave under this policy without supporting documentation; however, documented leave requests will receive priority attention in advance of undocumented leave requests.