PRACTICE EXERCISE III

Logging Billable vs. Non-Billable Time

BILLABLE TIME

Teamwork designates logged time as either billable or non-billable. Billable time should be assigned to ANY work we do on behalf of a client. That includes meetings (both internal and client calls) where a client is discussed, as well as strategy planning time, research and other general account time not tied to the

To help you determine where to log time, ask yourself this: If [insert client name] was not a Jairus client, would we be doing this [meeting, task, etc.]? If the answer is no, the time should be logged to the client, NOT the agency.

PRACTICE LOGGING TIME: BILLABLE

STEP 1:

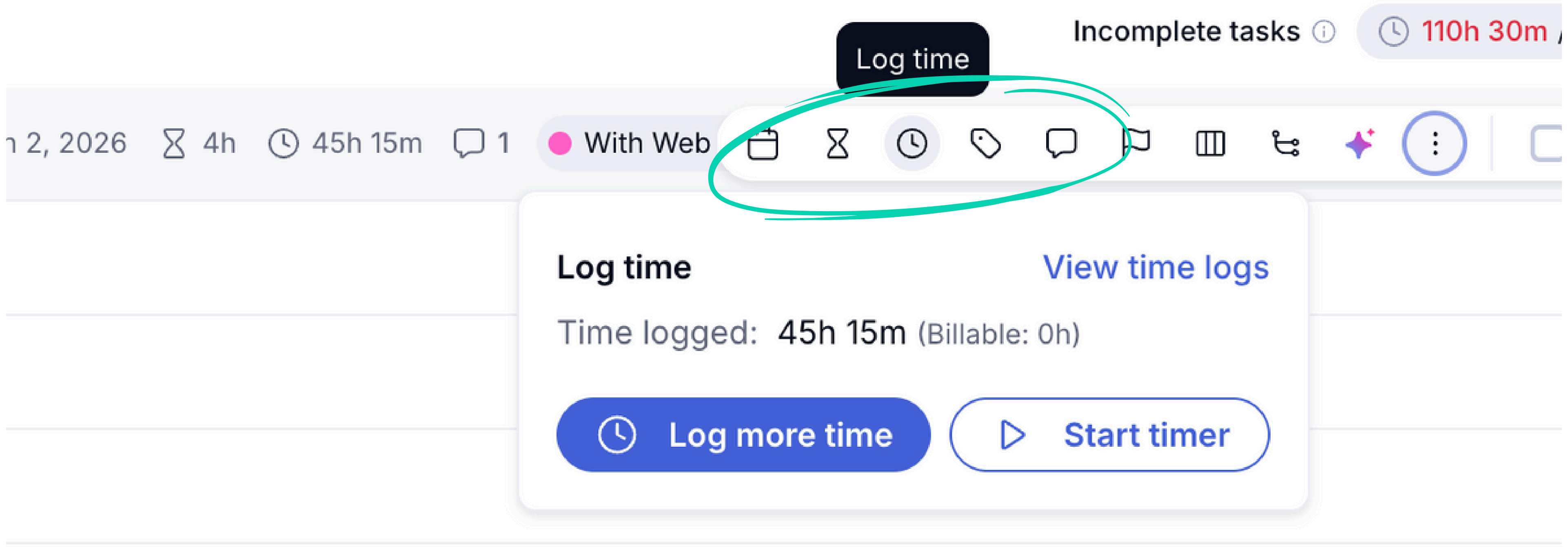
- Log into Teamwork, and navigate to your Task List.
- On your Task List, Locate the Task Called Billable Time Logging within the Project Named Practice Project 4: Time Logging.

PRACTICE LOGGING TIME: BILLABLE

STEP 2:

- From your Task List, click on the project name to access the full project, then locate your task within the full project view: Billable Time Logging

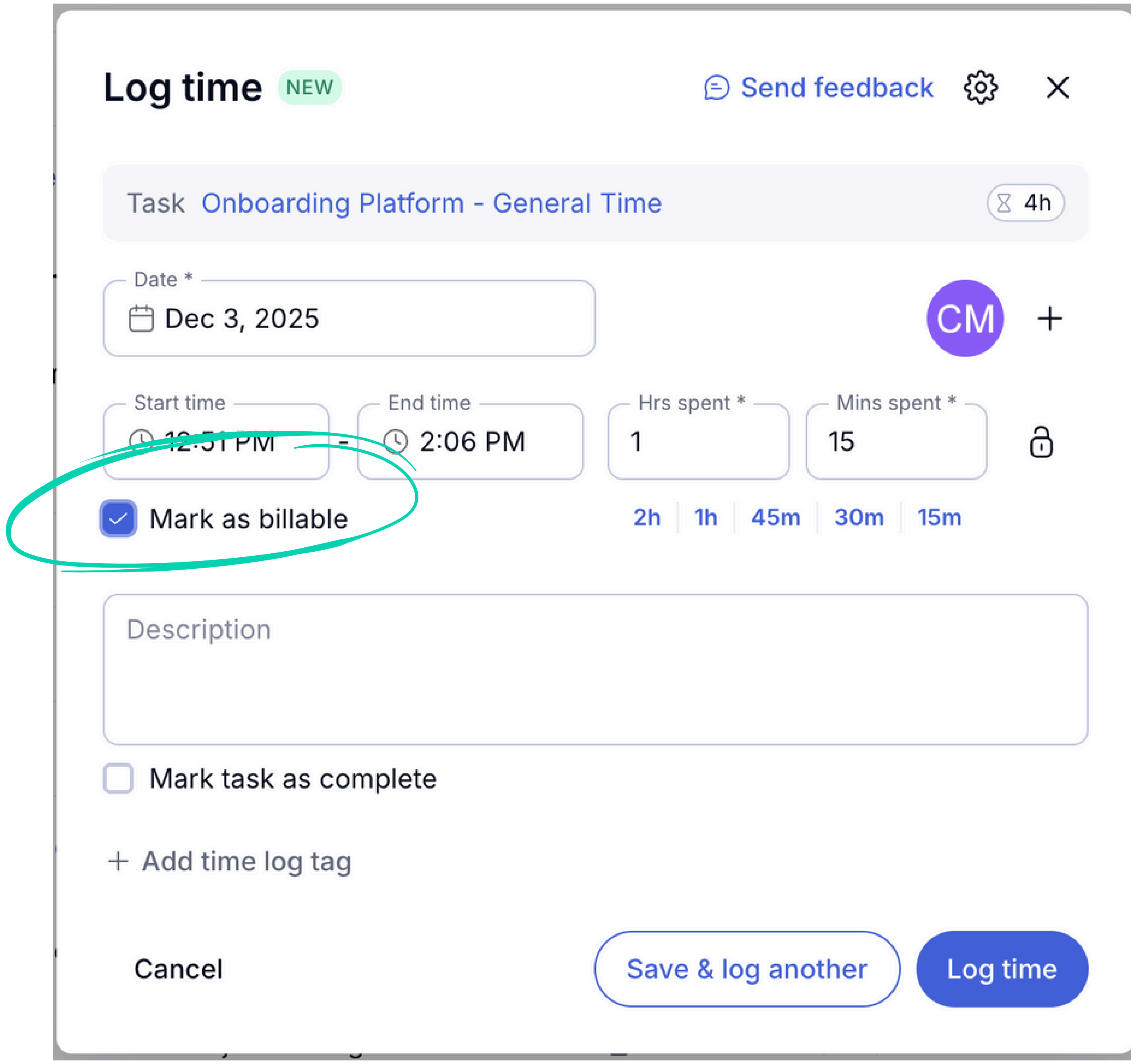
- On your task, find the clock icon and click on the Log Time button.



PRACTICE LOGGING TIME: BILLABLE

STEP 3:

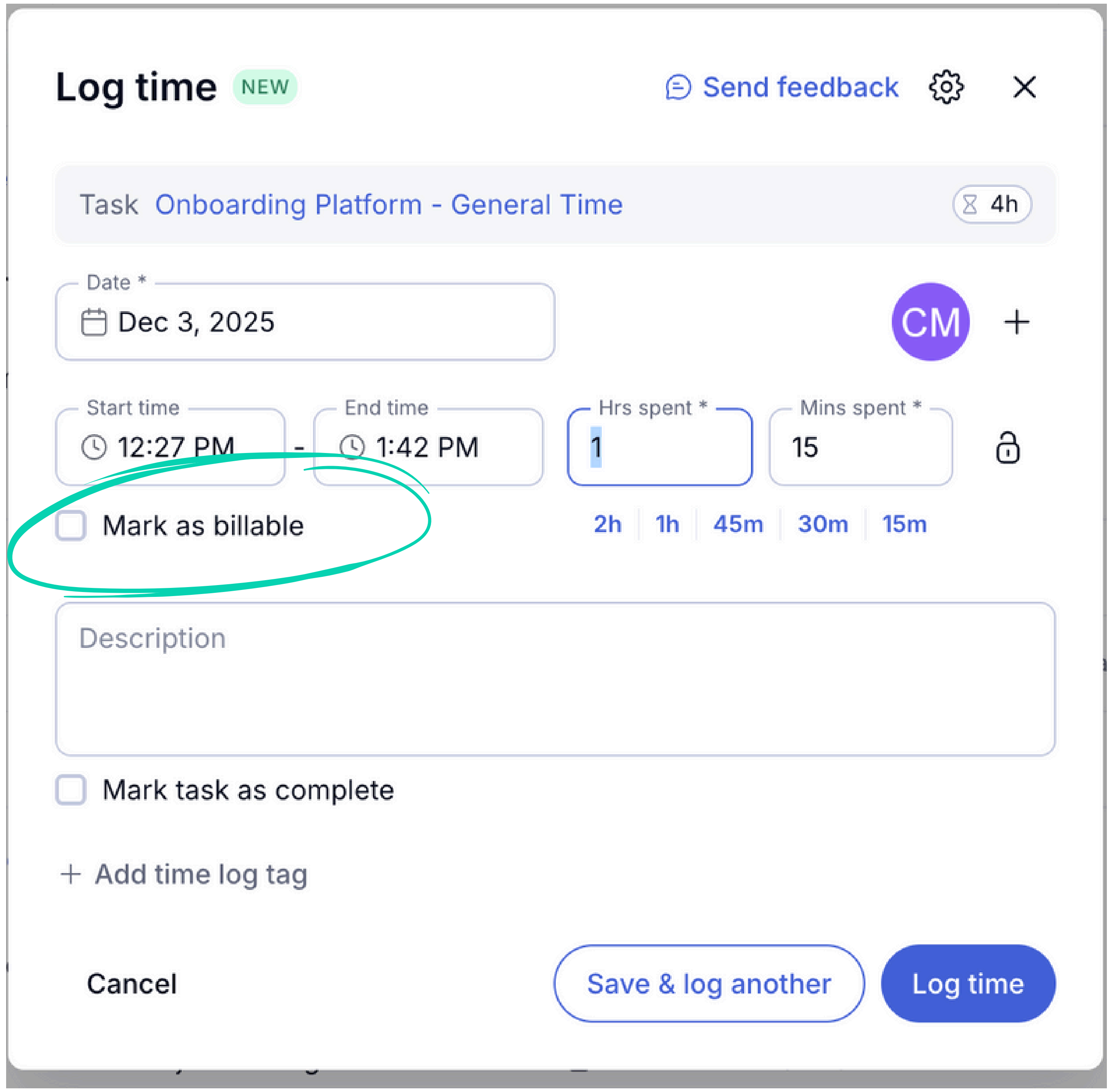
- In the Log Time pop-up box, enter 15 minutes. The start and end time are not important when logging time - only the total time spent.
- For time logged to the agency (internal time) confirm that the Mark as Billable box IS checked.



PRACTICE LOGGING TIME: BILLABLE

STEP 4:

- Click the blue Log Time button to log your time and close the pop-up box.
- Once your time has been logged, change your task status from With Account to Completed and confirm that your task is completed (grey checkmark icon changes to green checkmark icon).



PTO & AGENCY TIME

Time Logging: Agency Time

Any time not spent directly on clients should be logged to your Agency Internal Calls & General Time task. Every team member has an open task to log to throughout the year - this task stays open at the bottom of your Task List in Teamwork.

- Log any time not tied to a specific client here - the Daily Check-in Call, filling out a survey, HR meetings, employee performance reviews

- If a meeting, task or other activity IS tied to a client or multiple clients, that time should be logged to the client(s). For our internal performance reviews, for example, estimate the approximate time spent on each client (typically divide 1 hour by the # of clients discussed) and log that time to each client's open acct. mgt. hours.

Time Logging: PTO Time

Log any PTO to the Agency Internal Team Member PTO Time Entry project (every team member has their own task within this project that stays open through the year. Your PTO tasks stays live at the bottom of your Task List in Teamwork, for easy access.

How it works: After your PTO request in Bamboo has been approved, log that time within Teamwork on the correct date and with the correct time increment (typically 4 or 8 hours). Each date should be logged separately, on the corresponding day you're out. This includes paid holidays, when the agency is closed.

PRACTICE LOGGING TIME: NON-BILLABLE

STEP 1:

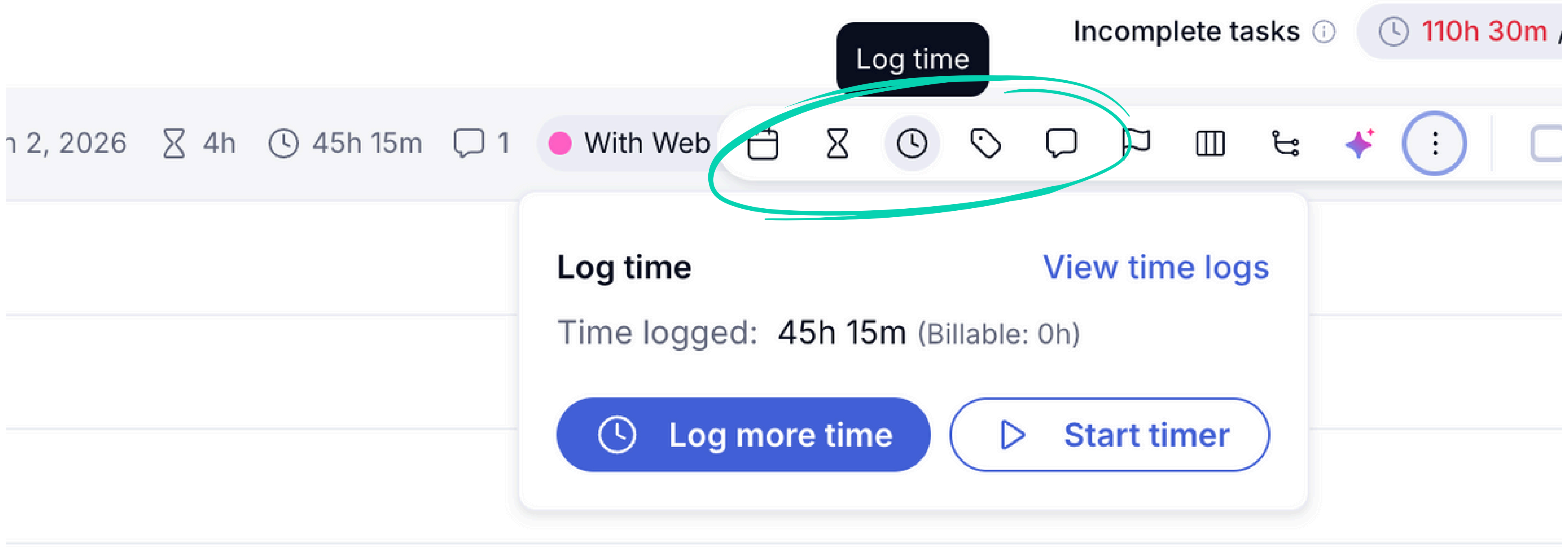
- Log into Teamwork, and navigate to your Task List.
- On your Task List, Locate the Task Called Non-Billable Time Logging - Agency Time within the Project Named Practice Project 4: Time Logging.

PRACTICE LOGGING TIME: NON-BILLABLE

STEP 2:

- From your Task List, click on the project name to access the full project, then locate your task within the full project view: Non-Billable Time Logging - Agency Time

- On your task, find the clock icon and click on the Log Time button.



PRACTICE LOGGING TIME: NON-BILLABLE

STEP 3:

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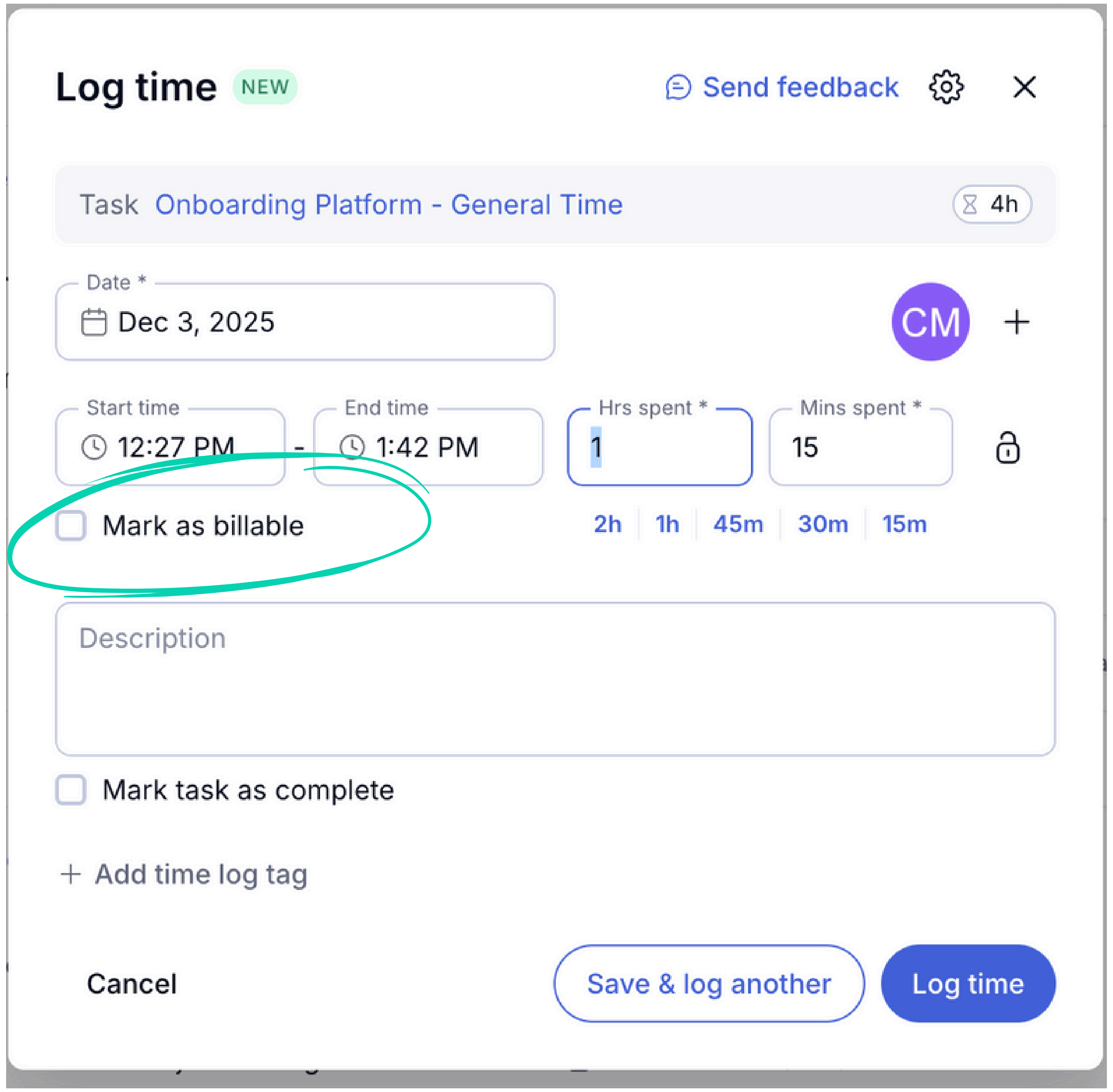
- For time logged to the agency (internal time) confirm that the Mark as Billable box is NOT checked.



PRACTICE LOGGING TIME: NON-BILLABLE

STEP 4:

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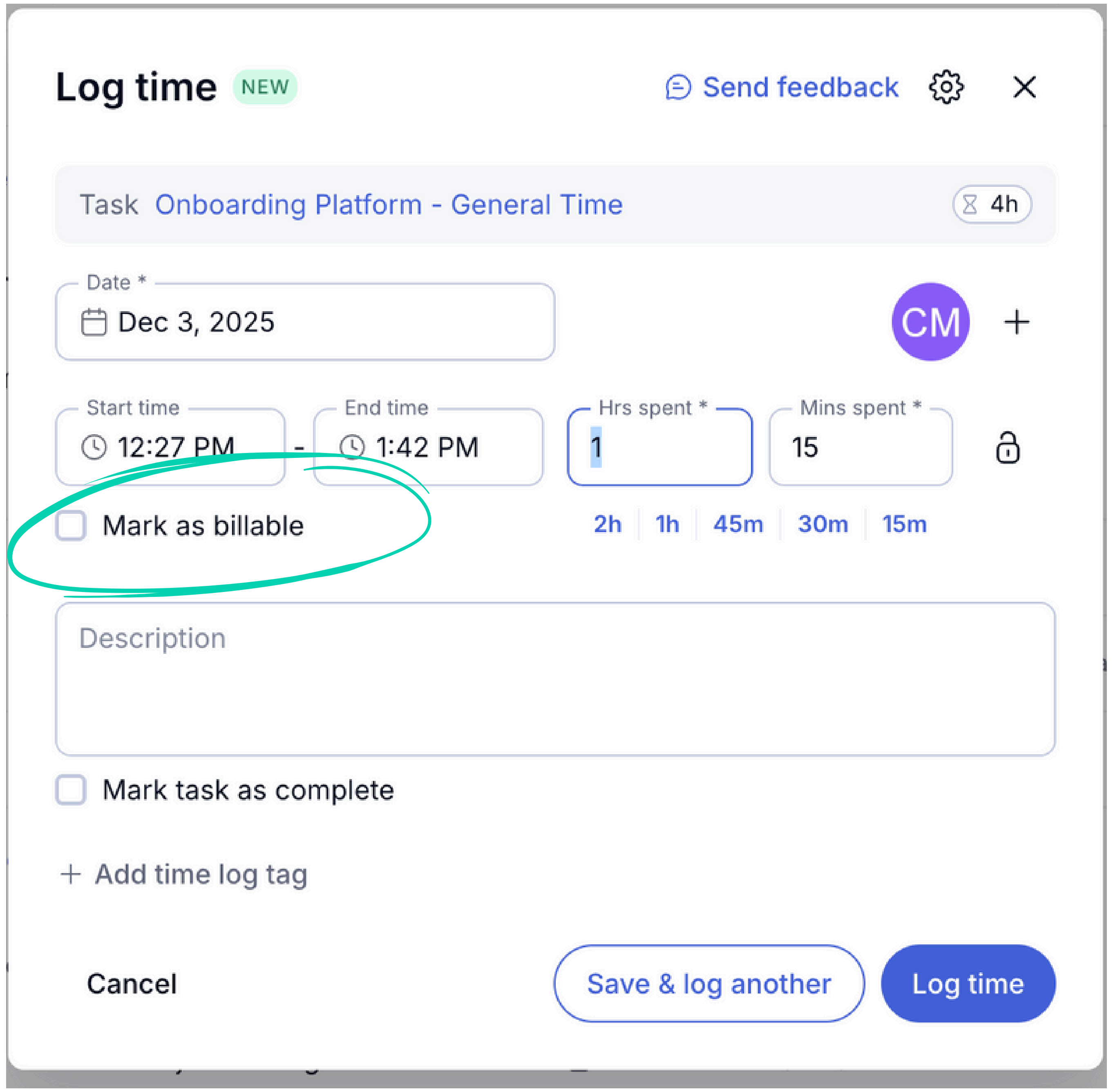


PRACTICE LOGGING TIME: NON-BILLABLE

STEP 1:

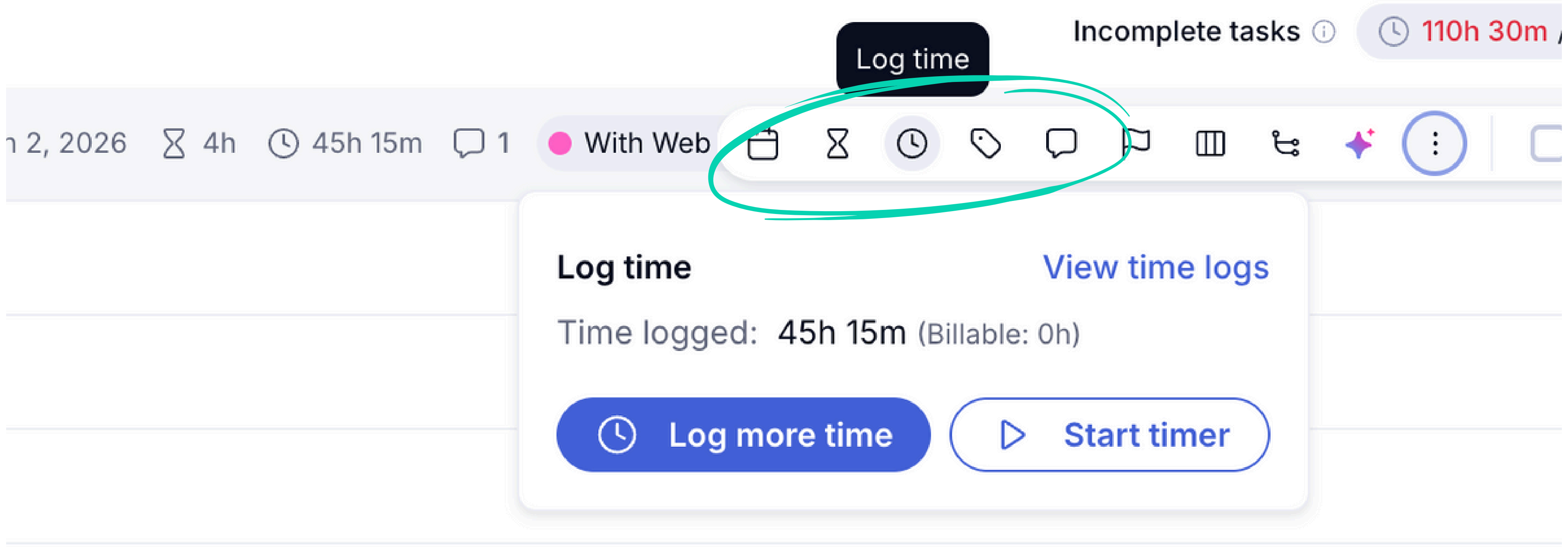
- Log into Teamwork, and navigate to your Task List.
- On your Task List, Locate the Task Called Non-Billable Time Logging - PTO Time within the Project Named Practice Project 4: Time Logging.

PRACTICE LOGGING TIME: NON-BILLABLE

STEP 2:

- From your Task List, click on the project name to access the full project, then locate your task within the full project view: Non-Billable Time Logging - Agency Time

- On your task, find the clock icon and click on the Log Time button.



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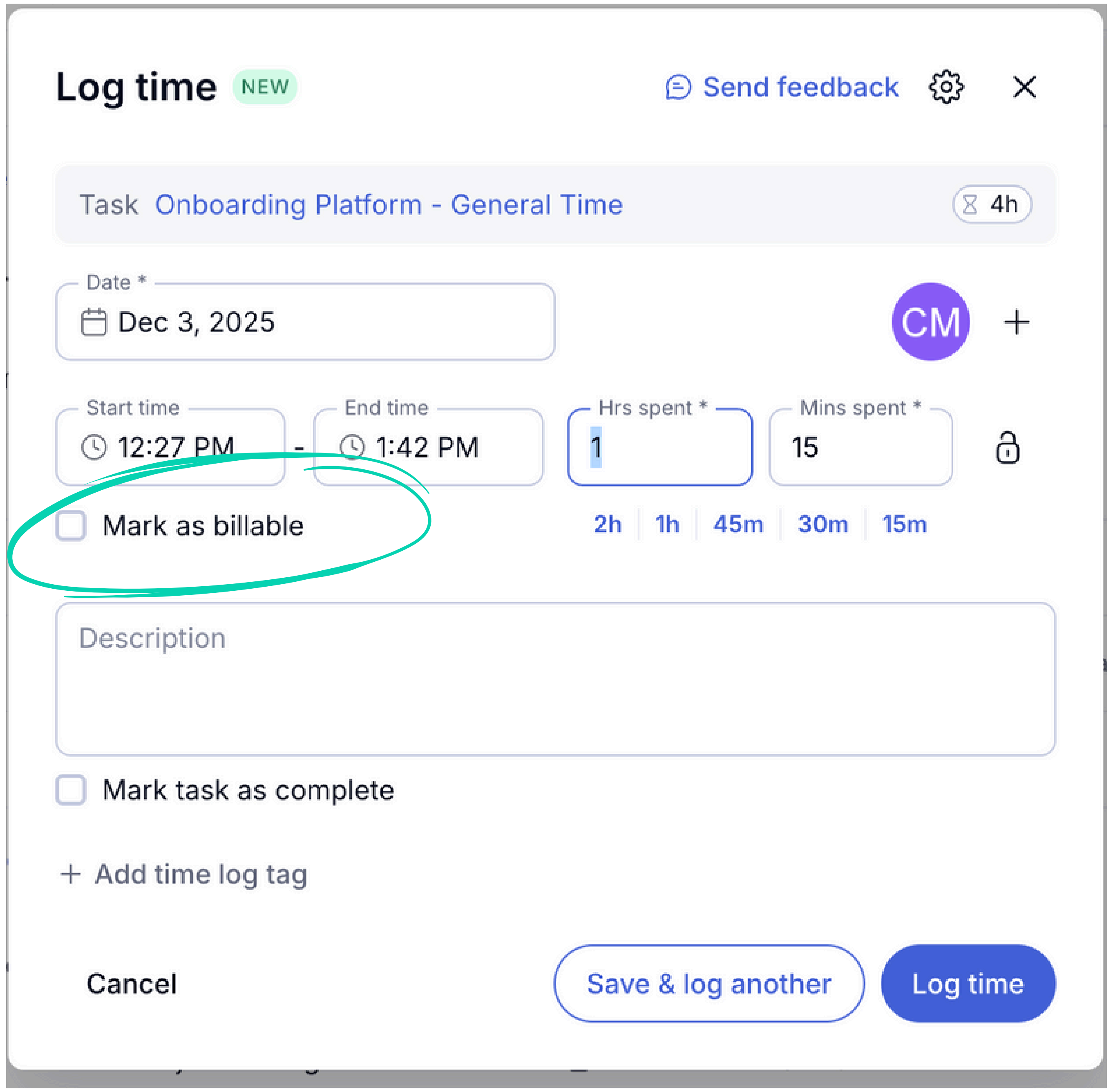

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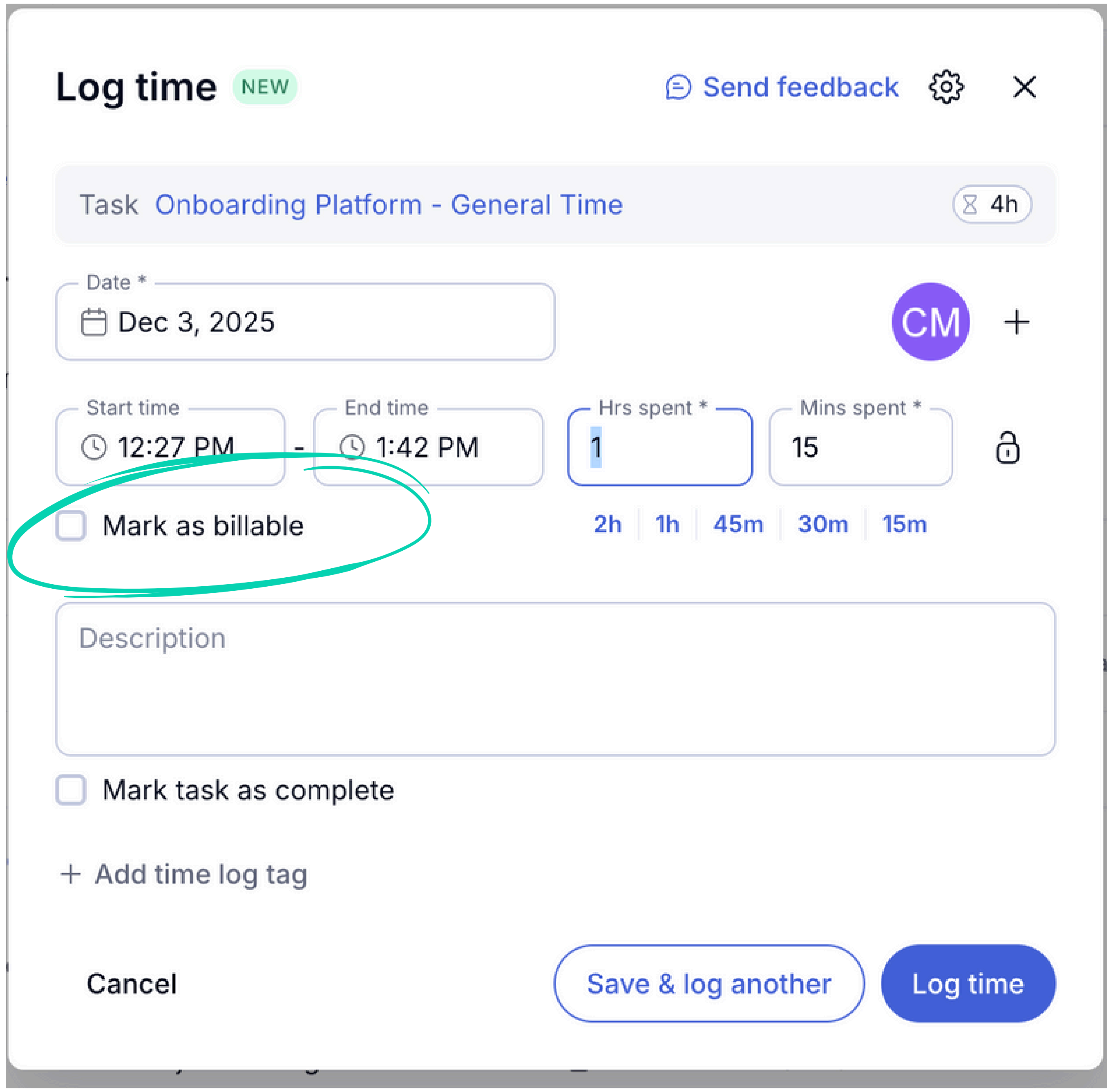

Have questions about logging time?

Reach out to our Project Manager.