Time Off Accrual

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Employee – Time off Accrual (Details Screen)

<mark>When talking about accrual dates, the system will look at pay period's not check dates.</mark>

Adding a New Time Off Accrual Type

1. - Click on the green plus key or alt insert to add a new time off accrual type.

2. **Type** - Use the drop down box to see the selection of time off accrual types. Select the type that you would like to add.

3. **Current Accrued** - If the employee has a beginning balance load it under this field. If not Save the info by using the green check mark at the top of the screen. As the employee accrues time, this field will be updated.

4. **Current Used-** This is updated when an employee uses time within payroll.

5. **Active** – If the employee should no longer accrue new time, but needs to use the existing balance, change this to no

6. **Override Annual Accrual Maximum-** If an employee can accrue to a different Annual Maximum than the company Time Off Accrual set up, add that Annual Maximum here.

7. **Override Rate-** If the employee can accrue at a different level than the company Time Off Accrual Rates, add the different rate. This rate will not change if there is a tier on the company level. This will have to be done manually.

8. If the employee is allowed to rollover time from one accrual type to another
   A. Select the correct type in the grid. This should be the type that holds the existing balance.
   B. In the override rollover type select the type that you want the balance to transfer to.
   C. Override Rollover Date – select the date that you want the rollover to happen

Remember: Time off Accrual is always based on the pay period dates, not the check dates.

9. **Override Eff (effective) Date -** If the employee should be accruing at a different hire level than what the Employee Hire date is, change the Eff Date to be greater than what the Original Hire date is on the EE Entry tab in Employee. Example: From 13 months through 24 months the employee should receive 2.5 hours per pay period of Vacation time. If a new hire should be getting rate of 2.5 hours per pay period, load in a hire date of 12 months prior to the Original Hire date.

Manual Adjusting a Time Off Accrual Type

1. To adjust a time off accrual type highlight the type in the grid and go to the field that needs to be adjusted in the bottom of the screen.

2. Highlight the entire field and type in what the new amount should be. This will bring up a **Reason box** at the bottom of the screen. Tab down to the reason and type in why you are adjusting that field.

3. Save the date by using the green plus key at the top of the screen or the F10 key button on the keyboard.

Using the Show TOA (Time off Accrual) History Button
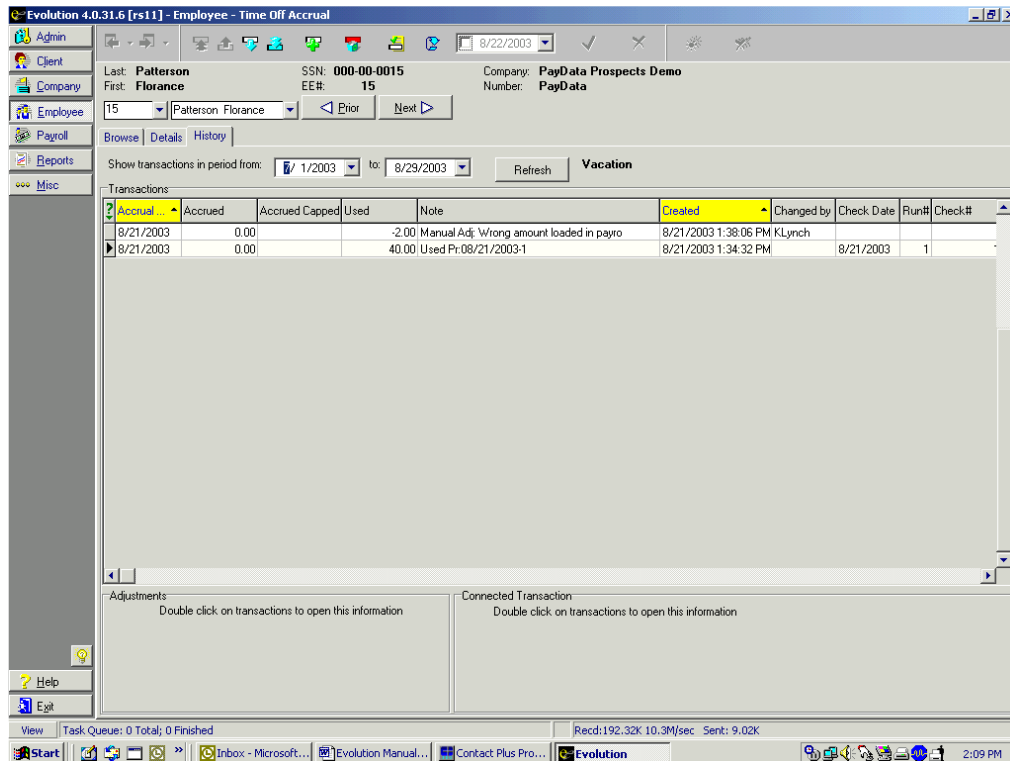
This is an information Tab only; used to show the history of each type of Time Off Accrual

1. Click on the Show **TOA History button** and this will add the History tab.

2. Use this field to tell if the change was a change made with payroll or a manual adjustment. This will also list who made the change according to the Evolution Log In it was made under.

Note: If you do not want the Employee's time off to begin accruing on hire date, do not set up the time off accrual until ready for the accrual to begin. If the Accrual begins at Hire Date but the employee is not allowed to use time off until a certain date, begin accrual on Hire Date but ask your Client Service Representative to block balance from showing on the check stub.