ADP Workforce Now®
Managing Time Off (PTO) Demonstration

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Project Leader
Multiple Award Policies

Purpose
We will be demonstrating a Multiple Award policy that allows a client to set up one policy with different award rules for different groups of employees.

Example:
The client's vacation policy allows newly-hired hourly employees to earn different vacation amounts based on the calendar month of hire than employees who have been with the company for over 1 year and whose awards are based on years of service.
Scenario - Hourly Employees

- Hourly employees receive a flat amount of hours upon new hire depending on the month they are hired.
- On an annual basis the amount of paid vacation an employee is eligible to receive on Jan 1, is based on the length of employment.
- Employees who are unable to use all allotted vacation days during the calendar year, are allowed to roll over a maximum of 80 hours to the following year.
- At the end of the calendar year, employees forfeit any unused vacation days in excess of 80 hours.
### Annual Vacation Award

<table>
<thead>
<tr>
<th>Years of Service</th>
<th>Vacation Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-0</td>
<td>See Pro-rated</td>
</tr>
<tr>
<td>1-4</td>
<td>80</td>
</tr>
<tr>
<td>5-6</td>
<td>88</td>
</tr>
<tr>
<td>7-10</td>
<td>96</td>
</tr>
<tr>
<td>11-15</td>
<td>104</td>
</tr>
<tr>
<td>16 or Higher</td>
<td>120</td>
</tr>
</tbody>
</table>

### Pro-Rated Vacation Award

<table>
<thead>
<tr>
<th>Hire Month</th>
<th># of Hours</th>
<th>Hire Month</th>
<th># of Hours</th>
<th>Hire Month</th>
<th># of Hours</th>
<th>Hire Month</th>
<th># of Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>80</td>
<td>Apr</td>
<td>64</td>
<td>Jul</td>
<td>40</td>
<td>Oct</td>
<td>24</td>
</tr>
<tr>
<td>Feb</td>
<td>72</td>
<td>May</td>
<td>56</td>
<td>Aug</td>
<td>40</td>
<td>Nov</td>
<td>16</td>
</tr>
<tr>
<td>Mar</td>
<td>72</td>
<td>Jun</td>
<td>48</td>
<td>Sep</td>
<td>32</td>
<td>Dec</td>
<td>16</td>
</tr>
</tbody>
</table>
Scenario - Hourly Employees (continued)

Rules
• Multiple awards must be entered in sequence, with the earliest expected award listed first

Benefits
• Saves time because you can set up one policy with multiple qualifiers
• Avoids having to manually move new hires from one policy to another
• More flexibility to base the awards on different lengths of service (years vs. month of year).
Demonstration
Testing your policy

- Assign the policy to employee that has no other assignments for clarity. Use the accrual date field if hire date is past or you can assign to any current new hire. Roll out the calendar to make sure accrual performs as expected. Forecasting will display roll overs and resets, but will not display transfers in from another policy.
Testing your policy

Use accrual date in conjunction with policy for testing

General Options: Additional Settings

Dates to determine Employee Service Date

Select the service dates in order of preference

1. Accrual Date

2. Hire Date

ADD
Testing your policy

• Assigning your policy
Testing your policy

• People, Time Off, Time Off Balances
Scenario two: Accrual type per payroll

- Employee receives a sick accrual of 1.54 hours per payroll.
- The maximum is 40.00 per year.
- Carryover is allowed up to 80 hours.
- Calendar year cycle, Jan 1st reset.
- Employee cannot request time until 3 month probation period is over.
Demonstration
Deleting your test

- People, Time Off, Policy assignments, Show Inactive.

View / delete history

Policy Assignments

<table>
<thead>
<tr>
<th>ASSIGNMENT START DATE</th>
<th>ASSIGNMENT END DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Future)</td>
<td></td>
</tr>
<tr>
<td>03/29/2017</td>
<td>03/29/2017</td>
</tr>
</tbody>
</table>
### Balance Carry Over Tip

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Service Date</td>
<td>The carryover occurs on the employee service dates selected in Step I-General Options (i.e. Hire Date)</td>
<td>Carryover balances on employees’ anniversary date</td>
</tr>
<tr>
<td>Specific Date (MM/DD)</td>
<td>Enter the specific calendar date for carryover to take place</td>
<td>Carryover Balances on 01/01.</td>
</tr>
<tr>
<td>At the time of the awards</td>
<td>Every time an award is made, the system carries the left over balance from one accrual period to the other (rather than once a year)</td>
<td>Carryover balances at the beginning of each month when the awards are granted. Reset the Balances on 01/01.</td>
</tr>
<tr>
<td></td>
<td>*A Reset Balances Option selection is required</td>
<td></td>
</tr>
</tbody>
</table>
# Mapping Policies

## Time Off Policy Mapping Guidelines
Differences in Mapping Requirements based on Policy Accrual Engine

<table>
<thead>
<tr>
<th>If the Accrual Engine Is:</th>
<th>Map the Time Off Reason Code to:</th>
<th>To Send:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workforce Now Time Off</td>
<td>Payroll Hours and Earnings code</td>
<td>Time taken to a paydata batch</td>
</tr>
<tr>
<td></td>
<td>Time &amp; Attendance Earnings code</td>
<td>Time taken to timecards and schedules. This mapping also enables time off entered directly on timecards to automatically generate a time off request</td>
</tr>
<tr>
<td></td>
<td>Payroll Memo codes***Optional</td>
<td>Balances to mainframe for display on pay statements</td>
</tr>
<tr>
<td>AutoPay</td>
<td>Time &amp; Attendance Earnings code</td>
<td>Time taken to timecards and schedules. This mapping also enables time off entered directly on timecards to automatically generate a time off request</td>
</tr>
<tr>
<td></td>
<td>Payroll Allowed and Taken Codes</td>
<td>Time taken to the paydata batch and then to AutoPay. This mapping also enables WFN Time Off to receive balances back from AutoPay via the YTD file</td>
</tr>
</tbody>
</table>
Appendix A

Time Off Policy

Time Off Policies
Policy Setup: Vacation
Time Off Setup feature has been enhanced. Learn More!

Policy Effective Date

General Options
Policy Name
Policy Description

EDIT USING CUSTOM TEMPLATE

EDIT
Employee Service Dates (in priority order)
1. Rehire Date
2. Hire Date

Time Off Tracking
Time is tracked in: Hours

Make this policy available on New Hire Template
No

Balances and Accruing Time Off
Allow balances to carry over

On Employee Service Date
On Specific Date (MM/DD) 1 / 1
At the time of awards

Waiting Period To Accrue Time Off
No waiting period

Accrual Processing for Employees on Leave
Put awards on hold

Carryover
Automatic
Forecasting
Yes

Transfer Balances to Another Policy
No balance transfer

ADP
A more human resource.
Time Off Policy (cont.)
## Time Off Summary (cont.)

### Award Rules and Tiers

- **Award Rule Name**: 

  - Select how often employees must be awarded time off:
    - One Time Only
    - On a specific interval

### Tier Configuration

- Define tiers based on:
  - Service length
  - Calendar month

- Select how employees service length must be calculated:
  - Calendar Year
  - Employee Service Date

### Tier Crossover

When employees cross a service tier in a distribution period, give them the accrual based on:

- Award amount defined in previous tier
- Award amount defined in current tier
- Award amount defined in tier where the employee has spent maximum time

<table>
<thead>
<tr>
<th>FROM MONTHS</th>
<th>TO MONTHS</th>
<th>AWARD AMOUNT</th>
<th>MAX BALANCE</th>
<th>MIN BALANCE</th>
<th>MAX CARRYOVER</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

[DONE]
Mapping Your Policy

### Time Off Policies

Time Off policy defines how an employee can accrue and use time off. Create different policy for each time off you want to track.

<table>
<thead>
<tr>
<th>POLICY NAME</th>
<th>ACCRUALS</th>
<th>EFFECTIVE DATE</th>
<th>EMPLOYEES ASSIGNED</th>
<th>MAPPING POLICY</th>
<th>STATUS</th>
<th>ACTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jury Duty</td>
<td></td>
<td>1/1/2012</td>
<td>50</td>
<td>Mapped</td>
<td>Map Now</td>
<td>Active</td>
</tr>
<tr>
<td>Personal</td>
<td>Use Workforce Now for processing accrual...</td>
<td>5/1/2012</td>
<td>50</td>
<td>Mapped</td>
<td>Map Now</td>
<td>Active</td>
</tr>
<tr>
<td>Sick</td>
<td>Use Workforce Now for processing accrual...</td>
<td>1/7/2013</td>
<td>50</td>
<td>Mapped</td>
<td>Map Now</td>
<td>Active</td>
</tr>
<tr>
<td>Vacation</td>
<td>Use Workforce Now for processing accrual...</td>
<td>4/21/2016</td>
<td>50</td>
<td>Mapped</td>
<td>Map Now</td>
<td>Active</td>
</tr>
</tbody>
</table>
Any questions on setting up Time Off Policies?