

ADP Workforce Now® Managing Time Off (PTO) Demonstration

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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.



Scenario - Hourly Employees (continued)

Annual Vacation Award	
Years of Service	Vacation Hours
0-0	See Pro-rated
1-4	80
5-6	88
7-10	96
11-15	104
16 or Higher	120

Pro-Rated Vacation Award							
Hire Month	# of Hours	Hire Month	# of Hours	Hire Month	# of Hours	Hire Month	# of Hours
Jan	80	Apr	64	Jul	40	Oct	24
Feb	72	May	56	Aug	40	Nov	16
Mar	72	Jun	48	Sep	32	Dec	16





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

 **Work Schedule**


FTE	Blackout Calendar <Not Assigned>
Assigned Shift	Default Request Hours
Scheduled Hours	Default start time
Hours Period	Accrual Date 4/1/2017

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. ▼
2. ▼ 

Testing your policy

- Assigning your policy

Policy Assignments ? ▶ ↗

RB Burgundy, Ron ▶
 TEST1 - test1
 Home Department : -

Tax ID (SSN) XXX-XX-XXXX Position ID 29596052N 🇺🇸 Hire Date 08/01/2016 Status Active

i Policies with an accrual method of US-based Benefit Accruals are not displayed because they can only be assigned to a U.S. Paid Position.

Move your selections from Policies to Assigned to Employee, or remove assignments by moving selections back to Policies.

Policies

sick accrual for workshop

Assigned to Employee

pto fixed for workshop [Start: 03/29/2017]

»» > < ««

CANCEL CONTINUE

Policy Assignments ? ▶ ↗

RB Burgundy, Ron ▶
 TEST1 - test1
 Home Department : -

Tax ID (SSN) XXX-XX-XXXX Position ID 29596052N 🇺🇸 Hire Date 08/01/2016 Status Active Employee Search <STATUS IS ACTIVE> 🔍

i Policies with an accrual method of US-based Benefit Accruals are not displayed because they can only be assigned to a U.S. Paid Position.

Move your selections from Policies to Assigned to Employee, or remove assignments by moving selections back to Policies.

Policies

sick accrual for workshop

pto fixed for workshop

Assigned to Employee

Choose Assignment Dates ✕

Select an Assignment Start Date to assign a policy, or select an Assignment End Date to unassign a policy.

POLICY	ACTION	ASSIGNMENT START DATE	ASSIGNMENT END DATE
pto fixed for workshop	Remove	3/29/2017	<input type="text" value="3/29/2017"/> 📅 Remove

CANCEL DONE

Testing your policy

- People, Time Off, Time Off Balances

RB Burgundy, Ron [▶](#) Tax ID (SSN) XXX-XX-XXXX Position ID 29596052N Hire Date 08/01/2016 Status Active
 TEST1 - test1
 Home Department : -

Pending Requests are not included in balances below.

Scheduled and Future Earned amounts only show values that impact the balance As Of date. Click the policy name for details.

Balances As Of:

TIME OFF POLICY	CARRYOVER	+	EARNED/ADJUSTED	-	TAKEN	-	SCHEDULED
-----------------	-----------	---	-----------------	---	-------	---	-----------

RB Burgundy, Ron [▶](#) Tax ID (SSN) XXX-XX-XXXX Position ID 29596052N Hire Date 08/01/2016 Status Active Employee Search [<STATUS IS ACTIVE>](#)

TEST1 - test1
 Home Department : -

Pending Requests are not included in balances below.

Scheduled and Future Earned amounts only show values that impact the balance As Of date. Click the policy name for details.

Balances As Of:

TIME OFF POLICY	CARRYOVER	+	EARNED/ADJUSTED	-	TAKEN	-	SCHEDULED	+	FUTURE EARNED
pto fixed for workshop	0		64.00 hours		--		--		--

RB Burgundy, Ron [▶](#) Tax ID (SSN) XXX-XX-XXXX Position ID 29596052N Hire Date 08/01/2016 Status Active

TEST1 - test1
 Home Department : -

Pending Requests are not included in balances below.

Scheduled and Future Earned amounts only show values that impact the balance As Of date. Click the policy name for details.

Balances As Of:

TIME OFF POLICY	CARRYOVER	+	EARNED/ADJUSTED	-	TAKEN	-	SCHEDULED
pto fixed for workshop	0		144.00 hours		--		--



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   

Policy pto fixed for workshop Balance 0.00 Hours

Select a record to delete.

 DELETE

ASSIGNMENT START DATE	ASSIGNMENT END DATE
(Future)	
<input checked="" type="checkbox"/> 03/29/2017	03/29/2017



Balance Carry Over Tip

Option	Description	Example
Employee Service Date	The carryover occurs on the employee service dates selected in Step I- General Options (i.e. Hire Date)	Carryover balances on employees' anniversary date
Specific Date (MM/DD)	Enter the specific calendar date for carryover to take place	Carryover Balances on 01/01.
At the time of the awards	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) *A Reset Balances Option selection is required	Carryover balances at the beginning of each month when the awards are granted. Reset the Balances on 01/01.

Mapping Policies

Time Off Policy Mapping Guidelines

Differences in Mapping Requirements based on Policy Accrual Engine

If the Accrual Engine Is:	Map the Time Off Reason Code to:	To Send:
Workforce Now Time Off	Payroll Hours and Earnings code	Time taken to a paydata batch
	Time & Attendance Earnings code	Time taken to timecards and schedules. This mapping also enables time off entered directly on timecards to automatically generate a time off request
	Payroll Memo codes***Optional	Balances to mainframe for display on pay statements
AutoPay	Time & Attendance Earnings code	Time taken to timecards and schedules. This mapping also enables time off entered directly on timecards to automatically generate a time off request
	Payroll Allowed and Taken Codes	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



Time Off Policy

Time Off Policies

Policy Setup: Vacation

Time Off Setup feature has been enhanced. [Learn More!](#)

Policy Effective Date:

General Options

[EDIT USING CUSTOM TEMPLATE](#)

<p>Policy Name *</p> <input type="text"/>	<p> EDIT</p>
<p>Policy Description</p> <input type="text"/>	<p> Employee Service Dates (In priority order)</p> <ul style="list-style-type: none">1. Rehire Date2. Hire Date <p> Time Off Tracking</p> <p>Time is tracked in: Hours</p> <p> Make this policy available on New Hire Template</p> <p>No</p>

Balances and Accruing Time Off

<p><input checked="" type="checkbox"/> Allow balances to carry over </p> <p><input checked="" type="radio"/> On Employee Service Date</p> <p><input type="radio"/> On Specific Date (MM/DD) <input type="text" value="1"/> / <input type="text" value="1"/></p> <p><input type="radio"/> At the time of awards</p>	<p> EDIT</p> <p> Waiting Period To Accrue Time Off</p> <p>No waiting period</p> <p> Accrual Processing for Employees on Leave</p> <p>Put awards on hold</p> <p> Carryover</p> <p>Automatic</p> <p> Forecasting</p> <p>Yes</p> <p> Transfer Balances to Another Policy</p> <p>No balance transfer</p>
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Time Off Policy (cont.)

Award Rules and Tiers

ADD NEW RULE

ORDER	RULE NAME	RULE TYPE	DETAILS	ACTION
There are currently no entries.				

EDIT

- Employee Banked Hours: None

Requesting Time Off

Allow time off requests on blackout days

Allow time off requests when balance is below minimum threshold

EDIT

- Waiting Period to Use Time Off: No waiting period
- Request Rules: Minimum amount per request: None, Request amount increment: None

Reason Codes

ADD REASON CODE

REASON CODE	DESCRIPTION	DELETE
Vacation	Vacation	

CANCEL **DOWNLOAD** **SAVE & EXIT** **DONE**



Time Off Summary (cont.)

< BACK

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

| Enter service tiers as ? Award amounts are tracked in **Hours**

<input type="checkbox"/>	FROM MONTHS	TO MONTHS	AWARD AMOUNT	MAX BALANCE	MIN BALANCE	MAX CARRYOVER
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>

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



Mapping Your Policy

Client ID: testb2k | RUBEN ROSADO

HOME RESOURCES MY TEAM PEOPLE PROCESS REPORTS SETUP

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.

Find as of: 4/27/2016 Show Inactive Show In Progress

POLICY NAME	ACCRUALS	EFFECTIVE DATE	EMPLOYEES ASSIGNED	REASON CODES	MAPPING POLICY	STATUS	ACTIONS
Jury Duty	-	1/1/2012	50	✔ Mapped	⚠ Map Now	Active	➔
Personal	Use Workforce Now for processing accrual...	5/1/2012	50	✔ Mapped	⚠ Map Now	Active	➔
Sick	Use Workforce Now for processing accrual...	1/7/2013	50	✔ Mapped	⚠ Map Now	Active	➔
Vacation	Use Workforce Now for processing accrual...	4/21/2016	50	✔ Mapped	⚠ Map Now	Active	➔

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Any questions on setting up Time Off Policies?



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