

## Benefit Accruals

(Please copy and paste this section for each time off category and each type of employee. Example: Hourly Sick, Salaried Sick, Hourly Vacation, Salaried Vacation).

**1. How would you like accruals to be handled in the system?**

- a. **System Maintained** – I would like the system to be responsible for calculating accruals.
- b. **User Maintained** – I would like to be responsible for calculating accruals. (If selected, only fill out items 2 and 4 below)
- c. **Imported** – I would like balances to be imported from a 3<sup>rd</sup> party system. (If selected, only fill out items 2 and 4 below)

**2. Time Off Category.** Ex. Sick, Vacation, PTO.

**3. Accruals are based on... (please check one).**

- a. Tenure based on Hire Date / Start Date / Other, please specify: \_\_\_\_\_
- b. Hours Worked
- c. Other, please explain:

**4. Please list the date in which your accrual schedule is based on (Anchor Date).** Ex. January 1<sup>st</sup>, Hire Date, etc.

**5. Do you have a waiting period associated with this time off accrual?** Ex. 90 days, 1 year, etc.

**6. How does the employee accrue during the waiting period? (please check one)**

- a. They do not accrue at all.
- b. They accrue during the waiting period, but cannot see the balance until they are out of the waiting period.
- b. They receive a pro-rated amount, please explain:
- d. Other, please explain:

**7. Does your company utilize carry over?**

- a. If yes, on what date does carry over apply?  
Ex. January 1<sup>st</sup>, Hire Date, etc.
- b. How many hours are carried over?
- c. Are carried over hours moved to another time off category? Ex. All carried over Sick time moves to the Unused Sick bucket.

<p>d. Do carried over hours have to be used by a certain date? <i>Ex. I can carry over 40 hours, but I must use that time within the next 90 days.</i></p>	
<p>e. What should happen to a negative accrual balance? <i>Ex. Carried over, zeroed out, moved to a different time off category.</i></p>	
<p>8. Using the following example, when tenure changes occur mid-accrue period, how should time accrue? <i>Ex. I accrue per month, my hire date is 1/15. (Please check one).</i></p> <p>a. I should accrue at my new rate on 1/1.</p> <p>b. I should accrue at my new rate on 1/15.</p> <p>c. I should accrue at my new rate on 1/30.</p> <p>d. Other, please explain:</p>	
<p>9. Is there a maximum amount the employees can accrue?</p>	
<p>a. If so, what happens if the employee uses some of their time off hours, are they able to accrue again to reach that maximum amount?</p>	
<p>10. How often do employees accrue? (please check one)</p> <p>a. Daily</p> <p>b. Monthly</p> <p>c. Quarterly</p> <p>d. Semi-Annually</p> <p>e. Weekly</p> <p>f. Per Pay Period</p> <p>g. Annually</p> <p>h. Custom, please explain:</p>	
<p>11. Please describe the schedule at which an employee accrues, adding additional rows if necessary:</p> <p>a. Initially, employee receives:</p> <p>b. After ___ years/months/days (please check), employee receives ___ hours.</p> <p>c. After ___ years/months/days (please check), employee receives ___ hours.</p> <p>d. After ___ years/months/days (please check), employee receives ___ hours.</p> <p>e. After ___ years/months/days (please check), employee receives ___ hours.</p>	