

Healthy Families Act Accrual Plan Setup Guide

new world ERP – Human Resources: Maintenance



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HOW TO SET UP AN ACCRUAL PLAN BASED ON HOURS WORKED

1. If the beginning of the year is the same for your part-times as it is for your full-times, go to step 2. If it is not, you will need to set up a new Hours Category and new Sick Earned and Sick Taken hours codes. After setting up the new category and codes, go to step 2.
2. If the beginning of the year is *Anniversary*, skip to step 4. If it is *Fiscal* or *Calendar Year*, navigate to Maintenance > Human Resources > Earnings Maintenance > Hours Categories to create an hours category.
3. Select the *Roll Date* month in which your organization starts the California Part-Time Sick Year. Do not select **Seniority Date**, **Hire Date**, **Benefit Date** or **Accrual Date**, even if you are anniversary-based.

ANNIVERSARY-BASED ACCRUALS SETUP

1. Navigate to Maintenance > Human Resources > Employee Attributes > Accrual Plans.
2. Click **New** to open the Accrual Plan Entry page:

Accrual Plan List
Accrual Plan Entry

Plan

Plan Code California PT

Plan Name PT Sick Hours

Status Active

Effective Range

Effective Date 01/01/2015

Last Used in Payroll

Save Save/New Reset

3. **Key Entries:**

Plan Code: Any code that best describes the group that will receive this Accrual Plan. This plan will be available for selection on each employee in Workforce Administration.

Effective Date: Date the accrual plan will be available for selection in Workforce. Later, as Create Event is used, it will dictate which plan is in effect when you run Calculate Accruals.

4. Click **Save**. The **Profile** tab will appear.
5. Click the **Profile** tab.
6. Click **New** to start a new accrual profile:

Accrual Plan List > Accrual Plan Entry - California PT

Accrual Profile Entry

Profile

Calculation Type	Calculation Method
Rule Set Type <input type="text"/>	Apply FTE or Accrual FTE <input type="text"/>
Calculation Based On <input type="text"/>	Allow Percent <input type="checkbox"/>
Anniversary Earn Date <input type="text"/>	Allow Percentage Earned to Exceed 100% <input type="checkbox"/>
Non Anniversary Earn Date <input type="text"/>	Percent Based On Equation <input type="text"/>
Interval Taken <input type="text"/>	Fixed Hours <input type="text"/>
Interval Earned <input type="text"/>	Actual Hours Based On <input type="text"/>
Rounding Method <input type="text"/>	Prorate Maximum Balances <input type="checkbox"/>
	Earn By Hours Worked <input type="checkbox"/>
Probation Information	Payoff Specification
Based on Date <input type="text"/>	Payoff Type <input type="text"/>
Days on Probation <input type="text"/>	Payoff Hours Code <input type="text"/>
	Lost Hours Code <input type="text"/>
eTimesheets Validation	
Allow Negative Balance <input type="checkbox"/>	
<input type="button" value="Save"/> <input type="button" value="Save/New"/> <input type="button" value="Reset"/>	

7. Key Entries:

Calculation Type

Rule Set Type: Tells the system what date type to use for Calculate Accruals and Hours Entry Maximum Earnings. Select one of the following four date types: **Accrual Date**, **Benefit Date**, **Hire Date** or **Seniority Date**. If none of these apply, use **Exception**. If you leave this field blank, only one rule set will be created on the Rule Sets tab.

In the case of California Part-Time Sick Hours, leaving this field blank will be the norm.

Calculation Based On: Determines the months of service an employee has. Select one of the following four: **Accrual Date**, **Benefit Date**, **Hire Date** or **Seniority Date**.

Anniversary Earn Date and Non-Anniversary Earn Date: Work date Calculate Accruals will use. Though both entries are required, only one may be used.

Select from the following: **Accrual Date**, **Benefit Date**, **First Day of Pay Period**, **First of the Month**, **Hire Date**, **Last Day of Pay Period**, **Last Day of Month**, **Manual**, **Seniority Date**.

If you select **Manual**, Calculate Accruals will use the date filled in on the Calculate Accruals screen. If you select any other date, Calculate Accruals will ignore the date filled in on the screen and use the date selected.

Interval Taken and *Interval Earned*: Tell the system how time can be taken and earned. If you leave either field blank, all four decimals will be used; however, you may enter **0001** up to **1.0000**.

Examples: An entry of **1.0000** would represent a whole number and would expect and use a whole number. An entry of **.25** would expect and use .25, .50, .75 and 1.00 but not .3333.

Rounding Method: Once you have filled in the *Interval Taken* or *Interval Earned*, determines the type of rounding: **Round Down**, **Round Up** or **Standard Rounding**.

In the case of California Part-Time Sick Hours, the *Interval Taken* and *Interval Earned* are expected to be blank.

Probation Information

Based On Date: Determines an employee's days on probation. Select one of the following four: **Accrual Date**, **Benefit Date**, **Hire Date** or **Seniority Date**.

Days on Probation: Number of days the employees in this profile are on probation. They can earn time but cannot use time until after the *Days on Probation*.

In the case of California Part-Time Sick Hours, 90 days are expected; however, to accommodate the non-consecutive 90 days, a new field, *Accrual Probation End Date*, is available on the **Jobs** tab in Workforce. This field will show only show for employees who have the *Earn by Hours Worked* selected.

Hours Category: Accrual category, such as vacation or sick time, of the plan profile. All related hours codes are tied to this category.

In the case of California Part-Time Sick Hours, the category of **Sick** is expected, but another could be used.

Hours Code: Hours code for the selected *Hours Category*—for example, **Sick Time Earned**. The field drop-down contains all hours codes that have the *Accruals* check box selected in Maintenance. This selection is required.

Calculation Method

Earn by Hours Worked: Requires selection for California Part-Time Sick Hours. Once selected, other fields will be available to be filled in.

8. Click **Save**. The **Rule Sets** tab will appear.

RULE SETS

9. Click the **Rule Sets** tab.
10. Click **New**:

Accrual Plan List > Accrual Plan Entry - California PT > Accrual Profile Entry

Rule Set Entry

Rule Set Code: [All] [v] [p] [n]

Operator: [v]

Earn Steps | Excess Hours Distribution

	Anniversary Calculation	Anniversary Date Type	Hours Worked	Hours Earned
[X]	Annually	Hire Date	30.0000	1.0000

Export

Since *Earned by Hours Worked* is selected, a new column, *Hours Worked*, will appear.

California part timers can earn 1 hour per 30 hours worked. Up to 24 hours may be earned and used per year.

A year is determined in one of three ways: calendar, fiscal or anniversary. The law did not indicate what the year needed to be, so the system will allow you to select the year that is right for your organization.

We treat calendar and fiscal years the same. If you are using calendar or fiscal year, you will need to set the *Roll Date* on the category for the month that starts the new year. This step will be explained at the end of this document so you will not need to leave the Accrual Plan.

If anniversary is to be used, **Annually** is available on the *Anniversary Calculation* drop-down.

11. **Key Entries:**

Anniversary Calculation: If the *Earned by Hours Worked* is selected, only **Annually** will be available. If your organization is to have the part timers earn and use their hours by their anniversary, select **Annually**; otherwise, leave the field blank.

Anniversary Date Type: Determines an employee's anniversary. Select one of the following: **Accrual Date, Benefit Date, Hire Date** or **Seniority Date**.

Do not select **None**; it does not pertain to this calculation.

Hours Worked: Number of hours an employee needs to work before earning any time. Appearing when *Earn by Hours Worked* is elected, this column is new.

In the case of California Part-Time Sick Hours, 30 hours is expected in this field.

Hours Earned: Number of hours to be earned.

In the case of California Part-Time Sick Hours, 1 hour is expected in this field.

Accrual Plan List > Accrual Plan Entry - California PT > Accrual Profile Entry

Rule Set Entry

Rule Set Code: [All] [v] [p] [n]

Operator: [v]

Earn Steps | Excess Hours Distribution

	Anniversary Calculation	Anniversary Date Type	Hours Worked	Hours Earned
[X]	Annually	Hire Date	30.0000	1.0000

Export

Minimum Hours: Minimum hours required to be worked in a pay period before this time may be earned.

In the case of California Part-Time Sick Hours, this field is expected to be blank.

12. Click **Save**.

13. Click the **Excess Hours Distribution** tab.

Accrual Plan List > Accrual Plan Entry - California PT > Accrual Profile Entry

Rule Set Entry

Rule Set Code: [All] Operator: []

Earn Steps: **Excess Hours Distribution**

	Hours Earned Maximum Balance	YTD Hours Earned Maximum	Max Taken Per Year	Roll Hours Cap
*	24.0000	24.0000	24.0000	24.0000

Export

Hours Earned Maximum Overflow Distribution

Lost/Paid Hours Code: Sick OT - Sick Time at Overtime R

Overflow Hours Code: []

☐ Allow Split

Percentage to Primary: []

Secondary Hours Code: []

☐ Allow Override of Hours Earned Maximum Balance

Roll Hours Transfer Distribution

Lost/Paid Hours Code: Sick P/T Used - Sick Used Part Tim

Overflow Hours Code: []

☐ Allow Split

Percentage to Primary: []

Secondary Hours Code: []

Max Taken per Year is a new column (explained below).

14. **Key Entries:**

Hours Earned Maximum: Maximum number of hours an employee may have in the bank at any one time.

In the case of California Part-Time Sick Hours, 48 hours are allowed, since up to 24 hours may be rolled over. If 24 hours are the most allowed, enter that number.

YTD Hours Earned Maximum: Maximum number of hours an employee may earn in one year.

In the case of California Part-Time Sick Hours, 24 hours is the most likely entry.

Max Taken per Year: Maximum number of hours allowed to be taken per year within this category.

In the case of California Part-Time Sick Hours, 24 hours is the most likely entry.

The **Hours Earned Maximum Overflow Distribution** section requires you to fill in a *Lost/Paid Hours Code*, but it will not be used. The hours will max at the *Max Taken per Year* when accruals are calculated.

The **Roll Hours Transfer Distribution** section requires you to fill in a *Lost/Paid Hours Code*, but it will be used only if you roll over this category and plan.

That concludes an *Anniversary*-based accruals setup. If your organization uses *Calendar* or *Fiscal Year*, follow the steps in the next section.

CALENDAR- OR FISCAL YEAR-BASED ACCRUALS SETUP

1. Navigate to Maintenance > Human Resources > Earnings Maintenance > Hours Categories:

Hours Categories				
Code	Description	Accrual Category	System Calculated	Roll Date
APPR	Appreciation	✓	✓	April 1
COMP	Comp Time	✓		
FMLA	FMLA	✓	✓	
HOL	Holiday	✓	✓	
MIL	Military	✓	✓	
OT	Overtime			
OTH	Other			January 1
PERS	Personal	✓	✓	
REG	Regular			
SICK	Sick	✓	✓	
VAC	Vacation	✓	✓	
WC	Worker's Compensation			

[View](#)
[Save](#)
[Save/New](#)
[Delete](#)
[Print](#)
[Cancel](#)

January 1
 February 1
 March 1
 April 1
 May 1
 June 1
 July 1
 August 1
 September 1
 October 1
 November 1
 December 1
 Seniority Date
 Hire Date
 Benefit Date
 Accrual Date

2. Select the *Roll Date* month in which your organization starts the California Part-Time Sick Year. Do not select **Seniority Date**, **Hire Date**, **Benefit Date** or **Accrual Date**, even if you are anniversary-based. They are not applicable for this setup.
3. If this setup is different from what you need for your full timers, you will need to create a new Sick Category and Sick Earned and Taken hours codes.

EMPLOYEE SETUP IN WORKFORCE ADMINISTRATION

Now that the accrual plan is set up, the applicable employees need the plan selected on their **Jobs** tabs in Workforce.

1. Using the Employee Search, search for all of the benefit groups or departments for which this plan is applicable.
2. Select the first employee.
3. Select the **Jobs** tab.
4. Highlight the primary job.
5. Click **Create Event**. If necessary, you may back date the event date.
6. Edit the primary job:

Employee Search

Abad, Shirley T (1693)

07/08/2001

Personal Employment **Jobs** Payroll Data Employer Reporting

Position: 43-031 - Athletic Staff Assistant I
 Title:
 Position Entry Date: 01/01/2015
 Department: 4311 - Parks - Athletics
 Department Entry Date: 01/01/2015

Union Code:
 Worksite: BG Recreation Center - Main Con
 Workers' Comp Code: 9102 - Parks & Recreation
 EEOC Category: Administrative Support
 EEOC Function: Natural Resources / Parks and Re
 Annual Survey Function:

Plan Information

Benefit Group: P/T No Accruals - Part Time - No
 Benefit Exception:
 Accrual Plan: California PT - PT Sick Hours
 Accrual Exception:
 Accrual Probation End Date:
 Longevity Plan:
 Longevity Exception:

Budgeting Information

Position FTE: 1.00
 Daily Hours: 4.0000
 Weekly Hours: 20.0000
 Cycle Hours: 40.0000
 Annual Hours: 1,040.0000

Common Links

Documents
 Notes
 eSuite Access
 Employee Service

Quick Links

Jobs

7. Select the appropriate *Accrual Plan*.
8. The *Accrual Probation End Date* shows only if the *Accrual Plan* has the *Earn by Hours Worked* selected. If the employee's probation period is nonconsecutive, you will need to enter when the probation period will end; otherwise, the setup on the plan will be used.
9. Click **Save**.
10. Navigate to the next employee. If you click the right arrow after the employee's name, you will be taken to the next employee who matches the selection criteria you used in the Employee Search. You also may click the magnifying glass and type the employee's name or number. Either method will take you to the **Jobs** tab for the next employee.

Note: If you use the magnifying glass, you will lose the employee list the original search generated on the drop-down.

11. You may need to have a separate Sick Taken for this plan so the system can determine the Hours Worked for the year. The system will look at all the hours codes that have *Apply to Accruals* selected. If Sick Taken has *Apply to Accruals* selected, you will want to use that hours code for these employees. Those hours would then be counted towards the 30 hours worked to get 1 hour.

Employee Number	Employee Name
1693	Abad, Shirley T
2610	Balzotti, Sage M
3253	Bitsko, Ansley R
3501	Cantres, Diego O

1693 Hire Date 7/8/01

Hours analysis = zero

3253 probation end date 5/30/2015, Hire Date 4/30/2015

Hours Analysis = zero

3501 Accrual Date 1/17/2014

Hours analysis = 203.50

2610 accrual date 4/1/2015, all others 8/6/2007

Hours Analysis = Hours Worked 1000.75

Sick P/T Used 15.75

3651 ZZZeck Hire Date = 4/22/2015

Prob Date 30 days